Sage 100 ERP 2015 – What's New

Global Enhancements

Migration Changes

- If you are converting data for a company using the Purchase Order module, a message appears asking if you want to retain purchase order history and whether you want to create history using data in the Purchase Order data entry files. For more information, see Purchase Order History.
- When upgrading Sage 100 Premium ERP, you no longer have to manually copy your company databases from the prior installation to the new one. The databases are now automatically copied when running the Parallel Migration Wizard.

Option to Install Canadian Postal Codes

When installing Sage 100 ERP, you now have the option to install Canadian postal codes. On the Module Selection page of the installation wizard, select Canadian Postal Codes to install the codes. They can then be maintained in ZIP Code Maintenance.

Module Options for Printing and Exporting

The module options for Library Master now include two options related to securing the data that appears in lookup windows and grids.

- The Allow Export to Excel from Lookups/Grids option allows the user to export the information listed in lookup windows and grids to Excel.
- The Allow Printing from Lookup Windows option allows the user to print the information listed in the lookup window.

Expanded Vendor Name Field

The vendor name field has been expanded to 50 characters. The field held a maximum of 30 characters in prior versions.

- Check forms now display up to 50 characters. If you have customized check forms, they will automatically print up to 50 characters, and long vendor names will wrap to a second line. The customized check forms must be modified. Otherwise, if a vendor name wraps, the city, state, and ZIP Code will not print when two address lines are used.
- The standard forms and reports handle the expanded field differently, depending on the report layout. On some, vendor names that exceed 30 characters wrap to the next line. On others, the longer names either fit on one line, or they are truncated.

For all standard forms and reports, the vendor name field in the work table has been expanded to hold 50 characters. You can use SAP Crystal Reports to modify these forms to display the full name if needed.

- Test all customized forms that print the vendor name to ensure that they correctly display names that exceed 30 characters. Be sure to check fields that include the vendor name, such as “remit to,” “purchase name,” and so forth.
- Reports created with the Business Insights Reporter Wizard must be modified by editing the report using SAP Crystal Reports Designer, or you can recreate the reports using the wizard.
- Labels that include both the vendor name and address have been updated to display a vendor name of 50 characters. Longer names will extend to a second line.

The vendor name field for mailing labels that print in three columns remains truncated. Also, labels that include only the vendor name, such as inventory labels, were not updated.

- Windows and tabs that display the vendor name have been updated to display either all 50 characters or as many as possible. For fields that do not display all 50 characters, you can use the Right Arrow key or the End key to move the cursor within the field and view the full name. The Home key returns the cursor to the beginning of the field.

Company-Specific Color for Window Frame Only

The Enable Company Specific Color check box on the Preferences tab in Company Maintenance has been replaced with a drop-down list. When enabling the feature, you can now specify whether the company-specific color will be used for the window background, for the frame around the window, or for both.

Lookup Wizard Button Added to Lookup Windows

A Lookup Wizard button has been added to all lookup windows. Click the button to start the User Lookup Wizard.

Clicking the Lookup Wizard button instead of the Custom button allows you to specify which companies and users will have access to the customized lookup view.

You must have the appropriate security setup to access the Lookup Wizard button.

Stay in Current Module When Changing Company

You can now remain in the current module when switching to a different company. To enable this feature, select the Retain Module on Company Change check box on the Preferences tab in User Maintenance.

New Fields on User Logon Screen

The following fields have been added to the User Logon screen.

- Job Title
- E-mail Address

The fields appear if the Participate in Program check box is selected in the Sage Product Enhancement Program window. The information will be used to help Sage to learn more about who uses the software and to send occasional product-related e-mails that provide information on product features and helpful tips.

Detailed Activity Log Entries for Changes to Module Setup Options

When changes are made in module setup tasks, such as Accounts Receivable Options, a more detailed description appears in the Activity Detail window accessed from the Activity Log.

A new activity type, Setup Options Activity, has been created to group these events. This allows you to easily view them when sorting by the Type column in the Activity Log and to search for them using the Activity Log Search button.

Accounts Payable Enhancements

Ability to Reprint Quick Print Checks

In Manual Check and Payment Entry, you can now reprint checks that have been quick printed. To reprint a quick print check, enter the check number and click the Reprint Check button. The checks can be printed as long as they remain in the data entry file.

Sort Report By Field for Vendor Audit Report

A Sort Report By field has been added to the Vendor Audit Report. You can now sort the report by either the vendor number or the user logon.

Ability to Sort By Multiple Columns

A Sort Columns button has been added to the windows listed below. Click the button to select one or more columns and specify whether to sort each one in ascending or descending order.

- Select Invoices for Payment window (accessed from Invoice Payment Selection
- Select Check and Electronic Payment Maintenance Invoices (accessed from Check and Electronic Payment Maintenance)
- Select Manual Check and Payment Invoices (accessed from Manual Check and Payment Entry)
- Select Vendor Transfer Invoices (accessed from Invoice Data Entry and Manual Check and Payment Entry)
- Select Customer Invoices (accessed through AP from AR Clearing Entry)

Purchase Vendor Transfer Invoice Selection

The Select button in the Purchase Vendor Transfer window is now available for all vendors so that you can select multiple invoices. Previously the button was available only if the vendor selected in the Purchase Vendor Transfer window was the same vendor selected in Invoice Data Entry or Manual Check and Payment Entry.

Print Full Comments Selection Retained When Printing Journals and Registers

When printing the journals and registers listed below, your choice of selecting or clearing the Print Full Comments check box will be retained. The same choice will be made automatically the next time you print the journal or register.

- Daily Transaction Register
- Invoice Register
- Manual Check and Payment Register

UDF Data Sources Added for Manual Check Printing

The following UDF (user-defined field) data sources have been added to AP_CheckStubWrk for manual check printing:

- AP_InvoiceHistoryDetail
- AP_InvoiceHistoryHeader
- AP_ManualCheckDetail
- AP_ManualCheckHeader
- AP_ManualCheckInvDetail
- GL_Account

Accounts Receivable Enhancements

Cash Receipt List Button

A Cash Receipt List button has been added to two windows.

- In the Cash Receipts Deposit window, clicking the button lists all unposted cash receipts. If batch processing is enabled, all unposted cash receipts for the selected batch are listed.
- In the Cash Receipts Entry window, clicking the button lists cash receipts for the selected deposit.

Sage Data Cloud Invoice Printing Option

A Use Sage Data Cloud for Invoice Printing check box has been added in Customer Maintenance. When this check box is selected, the Print Invoice check box will be cleared by default in A/R Invoice Data Entry and S/O Invoice Data Entry so that the customer's invoices are not printed as part of the typical invoice printing process.

This option is designed for use if you are e-mailing invoices to your customers using Sage Billing and Payment. For more information on Sage Billing and Payment or other solutions that leverage the power of the Sage Data Cloud, visit www.sage.com.

Sort Report By Field for Customer Audit Report

A Sort Report By field has been added to the Customer Audit Report. You can now sort the report by either the customer number or the user logon.

Ability to Sort By Multiple Columns

A Sort Columns button has been added to the Select Cash Receipts Invoices window that is accessed through Cash Receipts Entry. Click the button to select one or more columns and specify whether to sort each one in ascending or descending order.

Calculator Button Added to Finance Charge Applied Field

A calculator button has been added to the Finance Charge Applied field in the Finance Charge Entry window.

Ability to Filter Salesperson Commission Report by Pay Date

A Pay Date field has been added to the Selections grid in the Salesperson Commission Report window. This field is available if the Commissions Paid on Paid Invoices Only check box is selected in Accounts Receivable Options.

Ship Via Field Added to Customer Ship-To Address Maintenance

A Ship Via field has been added to customer Ship-To Address Maintenance. The shipping code entered in this field will be the default shipping code for sales orders and one-step Sales Order invoices.

Print Full Comments Selection Retained When Printing Journals and Registers

When printing the journals and registers listed below, your choice of selecting or clearing the Print Full Comments check box will be retained. The same choice will be made automatically the next time you print the journal or register.

- Daily Transaction Register
- Cash Receipts Journal
- Sales Journal

Option to Keep Window Open after Print or Preview

The following check boxes have been added to several task windows used for form printing:

- Keep Window Open After Print
- Keep Window Open After Preview

If the check boxes are selected, the window will remain open after printing or previewing the form.

If the form is part of a printing sequence, a Print Add'l Documents button will appear on the window. Click this button to continue with the print sequence when you have one or both check boxes selected.

For example, if you have the Keep Open After Print check box selected in Sales Order Printing, after you print sales orders, the Print Add'l Documents button will be enabled. You can then click the button to print picking sheets.

The check boxes were added to the following windows:

- Customer Mailing Labels
- Invoice History Printing
- Invoice History Printing (Quick Print)
- Invoice Printing
- Invoice Printing (Quick Print)
- Statement Printing

Bank Reconciliation

Sample Format in Positive Pay Export Wizard

A new sample format has been added to the Positive Pay Export Wizard.

Remit-To Vendor Name In Positive Pay Export File

If the Print Remit To Information check box in the Check Printing window is selected when printing checks, the vendor name entered in Remit To Address Maintenance is now used as the payee name in positive pay export files.

Ability to Sort By Multiple Columns

A Sort Columns button has been added to the windows listed below. Click the button to select one or more columns and specify whether to sort each one in ascending or descending order.

- Check Deposit and Adjustment Entry
- Reconcile Bank

Print Full Comments Selection Retained When Printing Journals and Registers

When printing the journals and registers listed below, your choice of selecting or clearing the Print Full Comments check box will be retained. The same choice will be made automatically the next time you print the journal or register.

- Bank Reconciliation Transaction Register
- Daily Transaction Register

Bar Code

Improved Process for Correcting Rejected Import Records

A Fix Entry button has been added to the Rejected Import Maintenance window. You can select a transaction and click this button to open the record containing the error.

If the error exists in the line information, the Rejected Import Record - Line Edit window opens with the applicable record selected, allowing you to bypass the Rejected Import Record - Header Edit window.

Also, an Error Message field has been added to the window. The field displays the message associated with the import failure.

Bill of Materials

Option to Synchronize Bill and Item Description

A Sync Bill Description and Item Description field has been added to Bill of Materials Options. You can select Yes, No, or Prompt to determine whether changes to the bill description and item description fields are synchronized.

- If you select Yes and the two description fields contain the same value, an update to one field automatically updates the other one.
- If you select Prompt and the two description fields contain the same value, a message will appear when you update one field asking if you want to update the other one.

This feature applies only to items that do not have an extended item description. If the Require Bill Revisions check box is selected in Bill of Materials Options, only the current revision is synchronized.

Print Full Comments Selection Retained When Printing Journals and Registers

When printing the journals and registers listed below, your choice of selecting or clearing the Print Full Comments check box will be retained. The same choice will be made automatically the next time you print the journal or register.

- Daily Transaction Register
- Disassembly Register/Update
- Production Register/Update

Credit Card Processing

Level 3 Credit Card Processing

You can now submit level 3 credit card transactions for payments entered in Sales Order Entry and S/O Invoice Data Entry. (Deposit transactions are not subject to level 3 processing because line item information is required, and there is no way to associate specific lines with a deposit.) The following related changes have been made.

Library Master

An ISO Country Code field has been added to the Country Code Maintenance window. This code will be included with the ship-to address information when processing level 3 credit card transactions.

Accounts Receivable

An Include Level 3 Data check box has been added to the Payment Type Maintenance window.

Sales Order

The following fields have been added to the secondary grid in Sales Order Entry and S/O Invoice Data Entry.

- Commodity Code
- Alt Tax ID
- Tax Type
- Net/Gross
- Debit/Credit
- Tax Amount
- Tax Rate

A Level 3 button has been added to the Credit Card tab in Sales Order Entry and S/O Invoice Data Entry. You can click the button to enter additional information for level 3 transactions. An empty text string or a zero value (depending on the field type) will automatically be transmitted for level 3 transactions if you do not enter a value for these fields.

The new fields on the Lines tab and the Level 3 button are available only if the following conditions are met:

- The customer’s credit card entered on the Credit Card tab is associated with a payment type set up for level 3 processing.
- The transaction type is Payment/PrePost Authorization.
- A value is entered in the Corporate ID/PO field.

Certain default values must be set to ensure that the fields added to the Lines tab are available without first entering information on the Credit Card tab. For more details and the steps required to prepare for level 3 processing, see “Setup Customer Credit Cards for Level 3 Processing” in the help system.

Customer Purchase Order Number

When you process level 3 credit card payments, customers' purchase order numbers will now be transmitted as part of the transactions.

The purchase order number will share the same field as the sales order or invoice number, and they will be separated by a dash. The purchase order number will have "PO" appended to the end. "SO" will be added to sales order numbers, and "IN" will be added to invoice numbers.

For example: 1234567PO - 7654321IN

This information may print on customers' credit card statements; it may be truncated, depending on the statement design.

Custom Office

User-Defined Scripts for Windows and Tabs

You can now create user-defined scripts for windows and tabs in Business Framework modules. A script can be added to any panel that is available through Customizer Selection. A User-Defined Scripts button has been added to the Customizer Selection window, and it will appear when a panel is selected.

Also, a field with a drop-down list has been added next to the Compile button in the User-Defined Script Maintenance window. Use this field to specify what type of scripts you want to compile.

General Ledger

Out-Of-Balance Message on Detail Report

If the General Ledger Detail Report is out of balance, "The Detail Report is not in balance" now prints next to the report totals.

Sort Report By Field for Account Audit Report

A Sort Report By field has been added to the Account Audit Report. You can now sort the report by either the account number or the user logon.

One-Click Journal Reversals

A Journal Reversal button has been added to the Transactions tab in Account Maintenance and to the Journal Drill Down window. Click this button to perform one-click journal reversals. The reversing entry is created, and a journal comment is added noting the reversal. You can then review the entry in General Journal Entry before updating it.

A security event, Allow Journal Reversal, has been added in Role Maintenance to enable the button.

Print Full Comments Selection Retained When Printing Journals and Registers

When printing the journals and registers listed below, your choice of selecting or clearing the Print Full Comments check box will be retained. The same choice will be made automatically the next time you print the journal or register.

- General Journal
- Recurring Journal
- Transaction Journal
- Daily Transaction Register
- Allocation Journal

Inventory Management

Module Options for Transaction Types

In Transaction Entry, the options available in the Transaction Type field are now based on the user's security setup.

The following module options have been added to Role Maintenance:

- Allow Transaction Entry Adjustments
- Allow Transaction Entry Issues
- Allow Transaction Entry Receipts
- Allow Transaction Entry Sales
- Allow Transaction Entry Transfers

For existing roles, the new module options are automatically selected so that the transaction types are allowed by default.

If you create a role for which none of the transaction types are allowed, users assigned to that role will not be able to access Transaction Entry.

Copy From Button in Product Line Maintenance

A Copy From button has been added to Product Line Maintenance. After entering a new product line, you can now click Copy From to copy information from an existing product line to the new one. The new Copy From window has a Copy Accounts check box that allows you to specify whether to copy the general ledger account information.

Copy From Options for Items

When using the Copy From button in Item Maintenance, you can now specify whether to include the vendor and alias item records of the item you are copying from.

The vendor and alias item information is copied by default, but you can exclude it by clearing the following check boxes that have been added to the Copy From window:

- Copy Item Vendors

- Copy Alias Items

The check boxes have also been added to the Item Maintenance On-The-Fly window.

Source Journal Zoom Button in Item Maintenance

A Source Journal Zoom button has been added to the Transactions tab in Item Maintenance. You can click the button to view detailed journal information about the selected transaction. The journal information is available only for transactions entered after you have upgraded from your previous version of Sage 100 ERP.

Also, a Source Journal column has been added to the transactions grid to display the source journal number.

Sort Report By Field for Item Audit Report

A Sort Report By field has been added to the Item Audit Report. You can now sort the report by either the item code or the user logon.

Access Bill of Materials Maintenance from Item Maintenance

You can now go directly from Item Maintenance to Bill of Materials Maintenance by clicking the More drop-down button in the top-right corner of the window and then clicking BOM Maintenance.

The BOM Maintenance option is available only if the currently selected item exists as a bill in the Bill of Materials module.

Security Options for Item Vendor Maintenance

Security options for Item Vendor Maintenance have been added to Role Maintenance; therefore, you can now maintain different levels of security for this task and Item Maintenance.

Last Physical Count Date Added to Item Maintenance

You can now view the date of the last physical count for an item in Item Maintenance and Item Inquiry. The Last Physical Count Date field displays the date that the Physical Count Variance Register was last updated. The field is view-only and has been added to the following locations:

- Additional Tab
- Quantity Tab
- Quantities grid on the Main tab

Library Master

Preexisting Codes in Country Code Maintenance

Country Code Maintenance is now pre-populated with country codes. The codes are the ones used in Sage CRM, as well as additional codes defined by the International Organization for Standardization (ISO).

An Alternate Country Code field has been added to the Country Code Maintenance window. This field, along with the others will be pre-populated with values.

As a result of this enhancement, the CRM Country Cross Reference Maintenance task is no longer necessary and has been retired. The alternate country code in Country Code Maintenance will be referenced by the Sage CRM integration when data is exchanged.

State Code Required Option

A State Code Required check box has been added to Country Code Maintenance. If this check box is selected for a country, the State field in ZIP Code Maintenance will be a required entry when adding a postal code for the country.

Paperless Office

Access Report Viewer Directly from Report Task Windows

You can now access the Report Viewer directly from report task windows. To access the viewer, click the drop-down button in the top-right corner of the window, and then click Report Viewer.

When the Report Viewer opens, the current company, module, and report will be automatically entered in the applicable fields, and the existing PDFs will appear in the list box.

The Report Viewer option is available only if the specific report is set up in Report Maintenance, and you must have the appropriate security set up to access it.

Updated PDF Printer Driver

The PDF printer driver used to create Paperless Office documents has been updated.

Paperless Office Feature Added to Reports and Registers

The following reports and registers can now be printed using Paperless Office.

Accounts Payable

- Vendor Contact Listing
- Repetitive Invoice Listing

Accounts Receivable

- Repetitive Invoice Listing
- Customer Contact Listing

Custom Office

- Customizer Summary Report
- Customizer Detail Listing

General Ledger

- Sage Payroll Services Activity Log

Inventory Management

- Item Valuation Change Register
- Standard Cost Adjustment Register
- Missing Count Card Listing

Library Master

- Role Report
- User Report
- Activity Log Report

Purchase Order

- Vendor Purchase Address Listing

Return Merchandise Authorization

- RMA Receivers
- Generate Transactions Listing

Sales Order

- Customer Ship-To Address Listing

Visual Integrator

- Job Listing
- Data Dictionary Listing

Payroll

New Fields Added to Tax Status Window

Three new fields have been added to the Tax Status window accessed from Employee Maintenance.

- The W2 Electronic Consent Signed check box, for use with Federal eFiling and Reporting, determines whether the employee receives an electronic or paper W-2 form.
- The MN Reporting Unit field, for use with State eFiling and Reporting for Minnesota, appears when MN is selected in the State field.
- The PA PSD Code field, for use with State eFiling and Reporting for Pennsylvania, appears when PA is selected in the State field.

Perpetual Payroll History Retained by Default

When a new company is created, the Retain Perpetual Payroll History check box in Payroll Options is now selected by default.

Purchase Order

Copy Purchase Order Information

A Copy from button has been added to the Purchase Order Entry window. After entering a new purchase order number, you can now copy information from one of the following:

- Purchase orders
- Purchase order history (if the Retain Purchase Order History check box is selected in Purchase Order Options)
- Purchase order receipts (if Yes or Period End is selected in the Retain Receipt History field in Purchase Order Options)
- Accounts Payable invoices (if the Post Accounts Payable Invoices check box is selected in Purchase Order Options and the Track Detailed Invoice/Payment History check box is selected in Accounts Payable Options)

Purchase Order History

The following fields have been added to the History tab in Purchase Order Options and to the Purchase Order Setup Wizard.

- Retain Purchase Order History
- Retain Deleted Orders
- Retain Deleted Lines for Orders

Select the Retain Purchase Order History check box to retain history. When the check box is selected, you can select Yes, No, or Prompt to define how deleted orders and lines are handled.

If the purchase order data entry files contain records and the purchase order history files are empty when you select the Retain Purchase Order History check box, a message appears asking if you want to create history records. Click Yes to create records for any standard orders, drop-ship orders, and material requisitions that exist in the purchase order data entry files.

Option to Create History During Data Conversion

If you are upgrading from a prior version of Sage 100 ERP, before converting data you will see a window with the same fields that were added to Purchase Order Options. You can enable the history feature and choose whether to create history at that time.

Create Purchase Order History Utility

If you do not choose to create history records when you first select the Retain Purchase Order History check box, you can do so later using the Create Purchase Order History utility. This new utility has been added to the Purchase Order Utilities menu.

Purchase Order History Inquiry

A new task, Purchase Order History Inquiry, has been added to the Purchase Order Inquiries menu. The task is available only if the Retain Purchase Order History check box is selected in Purchase Order Options.

Purchase Order History Report

The Purchase Order History Report has been added to the Purchase Order Reports menu. The report is available only if the Retain Purchase Order History check box is selected in Purchase Order Options.

When generating the report, you can select which purchase order types to print and choose from multiple sort options. The report can be further filtered using the selections grid.

Cancel and Reason Code Maintenance

A new task, Cancel and Reason Code Maintenance, has been added to the Purchase Order Setup menu. The task is available only if Prompt is selected in the Retain Deleted Orders or Retain Deleted Lines for Orders field in Purchase Order Options.

Use this task to create reason codes for tracking why purchase orders and purchase orders lines are deleted. The codes can be flagged as inactive so that they will not show up in lookup results.

Codes can also be created on they fly when deleting a purchase order or line.

New Business Insights Views

Several views related to purchase order history have been added to Business Insights Reporter, and one related view has been added to Business Insights Explorer.

Sort Option for Auto-Generated Purchase Orders

A Sort Purchase Order Lines By field has been added to the Generate tab in Purchase Order Options. Use this field to determine how purchase order lines are sorted -- either by item code or by sales order line number -- on the Auto-Generate from Sales Orders Listing and in Purchase Order Entry.

Use Data Entry Email Address for Paperless Office Delivery

A Use E-mail Address in Data Entry check box has been added to the Email tab in the Paperless Office Delivery Options window accessed from Vendor Maintenance. The check box is available when you select either P/O Order or P/O Return in the Document field and the E-mail check box on the Main tab.

Select this check box to email purchase orders and return orders to the vendor email address entered in Purchase Order Entry and Return Order Entry.

Option to Keep Window Open after Print or Preview

The following check boxes have been added to several task windows used for form printing:

- Keep Window Open After Print
- Keep Window Open After Preview

If the check boxes are selected, the window will remain open after printing or previewing the form.

If the form is part of a printing sequence, a Print Add'l Documents button will appear on the window. Click this button to continue with the print sequence when you have one or both check boxes selected.

For example, if you have the Keep Open After Print check box selected in Sales Order Printing, after you print sales orders, the Print Add'l Documents button will be enabled. You can then click the button to print picking sheets.

The check boxes were added to the following windows:

- Purchase Order Printing
- Purchase Order Printing (Quick Print)
- Return Order Printing
- Return Order Printing (Quick Print)

New Vendor Memo Button

A Vendor Memo button has been added next to the Vendor button in the tasks listed below. From any tab, you can click the button to view, create, or update memos for the currently selected vendor.

- Purchase Order Entry
- Receipt of Goods Entry
- Receipt of Invoice Entry
- Return of Goods Entry

Receipt History Inquiry

The following fields have been added to the grid on the Receipt history Inquiry Lines tab.

- Allocated Freight
- Allocated Landed Cost
- Allocated Tax

The fields listed below have been added to the Additional Fields window that appears when you select a line and click the Additional Information button.

- Item Type
- Product Type
- Product Line
- Costing

Calculator Button for Landed Cost Amount Field

A Calculator button has been added to the Amount field in the Landed Cost Entry window accessed through Receipt of Goods Entry.

Document and Batch Number Added to Purchase Order Entry Message

The message that appears in Purchase Order Entry when you select an order that is referenced in a receipt, return, or material requisition transaction will now include the number of the referencing transaction. If you have batch processing enabled for data entry tasks, the batch number is also included.

Fields Added to Ship-To Address Maintenance

A warehouse field has been added in Ship-To Address Maintenance:

The warehouse code entered in this field will be used in the data entry tasks listed below if you select a record and enter a ship-to address.

- Material Requisition Issue Entry
- Purchase Order Entry
- Receipt of Goods Entry
- Receipt of Invoice Entry
- Return of Goods Entry

Print Full Comments Selection Retained When Printing Journals and Registers

When printing the journals and registers listed below, your choice of selecting or clearing the Print Full Comments check box will be retained. The same choice will be made automatically the next time you print the journal or register.

- Daily Receipts Registers
- Daily Transaction Register
- Material Requisition Register
- Return Order Register

Redisplay Source Document After Quick Printing

On the Printing tab in Purchase Order Options, you can now select whether to redisplay the source document after quick printing in Purchase Order Entry and Return of Goods Entry.

Calculator Button Added to Purchase Order Entry Fields

A calculator button has been added to the Unit Cost and Extension fields in Purchase Order Entry.

Return Merchandise Authorization

Calculator Button Added to Multiple Fields

A calculator button has been added to the Unit Price and Restocking Charge fields in RMA Entry and RMA Receipts Entry.

Sage CRM

Access RMA Entry from Sage CRM

You can now access RMA Entry from within Sage CRM. An RMA Entry button has been added to the following locations:

- The menu that appears when you right-click the New button on the left side of the screen
- The Company Summary Page

You must be in the context of a company to access RMA Entry.

Reorganized Main Menu

The Main menu in the Customer Relationship Management module has been reordered. The tasks now appear in the order in which you access them to set up the modu

Sage Intelligence Reporting

Updated Version of Sage Intelligence Reporting

An updated version of Sage Intelligence Reporting provides the following benefits:

- Improved performance for the Financial Report Designer

- Missing accounts detection
- Context-specific help
- Inclusion of formula's within distributed reports
- Updated report templates

For details on these enhancements, see the *What's New* document in the Sage Intelligence Reporting online help.

Security Option for Report Viewer

You can now manage access to the Report Viewer through Role Maintenance. On the Tasks tab, a Report Viewer check box has been added under Sage Intelligence Reporting > Reports/Forms.

Sales Order

Ability to Reauthorize Credit Card Transactions

The Fix button is now available on the Credit Card tab in Sales Order Entry and Invoice Data Entry if there is an expired credit card authorization for the selected order or invoice. You can click this button to reauthorize the credit card transaction.

The Fix button is available if the Allow to Override Credit Card Authorization security event is selected for your role in Role Maintenance.

For more information on using this feature, see *Reauthorize a Credit Card Transaction* in the help system.

New Customer Memo Button

A customer Memo button has been added next to the Customer button in Sales Order Entry and Invoice Data Entry. From any tab, you can click the new Memo button to view, create, or update memos for the currently selected customer.

Batch Number Added to Sales Order Entry Message

If you have batch processing enabled for Invoice Data Entry, the messages that appear in Sales Order Entry when you select an order that is being invoiced or shipped will now include the batch number.

Ability to Omit Orders On Hold When Printing

A Print Orders On Hold check box has been added to the Sales Order Printing window. The check box is selected by default, but you can clear it to omit orders on hold when printing. A Print Order On Hold check box has also been added to the quick print window.

Calendar Button Added to PO Req Date Field

A calendar button has been added to the PO Req Date field in Sales Order Entry.

Calculator Button Added to Tax Amount Field

A calculator button has been added to the Tax Amount field in the Tax Detail window accessed through Sales Order Entry and Invoice Data Entry.

Message Appears if Quantity Packed Does Not Match Quantity Shipped

A message now appears in Shipping Data Entry and Item Package Maintenance if the quantity packed does not match the quantity shipped for one or more items.

Changes to Additional Fields Information

The following changes have been made for the information that is displayed in the Additional Fields window accessed from Sales Order and Quote History Inquiry:

- Information will now appear in the Product Type, Product Line, and Price Code fields.
- The information in the Costing field is now formatted correctly.
- Bill options now appear as they do in Sales Order Entry.
- The user logon of the person who created the sales order now appears in the upper-right corner of the window.

Option to Keep Window Open after Print or Preview

The following check boxes have been added to several task windows used for form printing:

- Keep Window Open After Print
- Keep Window Open After Preview

If the check boxes are selected, the window will remain open after printing or previewing the form.

If the form is part of a printing sequence, a Print Add'l Documents button will appear on the window. Click this button to continue with the print sequence when you have one or both check boxes selected.

For example, if you have the Keep Open After Print check box selected in Sales Order Printing, after you print sales orders, the Print Add'l Documents button will be enabled. You can then click the button to print picking sheets.

The check boxes were added to the following windows:

- Additional Packing List Printing
- Additional Packing List Printing (Quick Print)
- COD Label Printing
- COD Label Printing (Quick Print)
- Invoice Printing
- Invoice Printing (Quick Print)
- Packing List Printing
- Packing List Printing (Quick Print)

- Picking Sheets Printing
- Picking Sheets Printing (Quick Print)
- Sales Order Printing
- Sales Order Printing (Quick Print)
- Shipping Entry Label Printing
- Shipping Label Printing
- Shipping Label Printing (Quick Print)