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Newsletter for Sage PFW

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## Headline News

Sage has recently created an Online Community for Sage PFW ERP customers. The site offers customers the opportunity to engage and interact with one another through a variety of different communication forums and tools. Jump right in, join a discussion, and share your experiences: [click here](#).

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## Introducing Sage PFW Version 5.7

Sage PFW ERP Version 5.7 will be available in early 2009. This latest version incorporates many customer-requested features designed to streamline processing and increase productivity. We previewed this release in an earlier newsletter, so in this article we'll highlight some of the many features and functionality that space prohibited us from telling you about last time. If you'd like a complete list of the new features, please give us a call.



### Import Your Bank Statement

Your bank can typically provide your company bank statement in an electronic format, and now you have the ability to import electronic bank statement transactions into the Bank Book reconciliation screen using the file from your bank. The import supports either a Microsoft Excel (.xls) or Comma Separated Value (.csv) file format, and it includes the ability to define the .xls file format layout during the import. You can define the column numbers where the Date, Check Number, Description, Debit, and Credit information reside within the Microsoft Excel spreadsheet.

The import can be run in trial mode to test the process before running in final mode. A simple report provides information on the import for your records. Once the import is complete and you access the Account Reconciliation menu item, any discrepancies are noted and corrections are recorded.

Based on input from Sage PFW customers,

the reconciliation screen was updated to facilitate navigation. The ability to sort by any column and a new Undo button were added, and the Auto Reconcile button was moved away from the Reconcile Current line button. The Undo button allows you to remove the last edit within the Reconciliation screen.

### Historical Receivables Report

Version 5.7 adds a new Historical Receivables Report that gives you the ability to view aged receivables information as of a date you specify. Now you can close your period and still have the information you need for audit purposes.

### Item Status Support

You may be familiar with the control and security the Customer and Vendor Status fields deliver. Version 5.7 adds a new Item Status field. Now you can set Item status to *No New Purchases*, *Obsolete*, or *Deactivated*, and the system will consider it non-active,

(continued on page 2)

## Introducing Sage PFW Version 5.7

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and allow you to decide the modules that will be prevented from processing the item. By eliminating the ability to enter an inappropriate item code you can increase accuracy during data entry.

### New And Expanded Fields

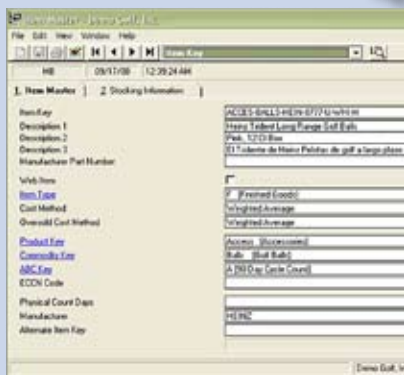
Version 5.7 expands the size of several existing fields and adds new fields to help you better track important information.

A third Item Description field was added to the Item Master File Maintenance menu item, and Description 1 and 2 were lengthened, giving you greater flexibility in describing your items.

With the new Customer and Vendor Description fields you can track more information, such as the customer or vendor name in a different language, or any other type of information that you require.

Other new fields include: Inventory INCI (International Nomenclature of Cosmetic Ingredients) and EC (Enzyme Commission) Number. In addition, several field sizes were expanded, including the Vendor Name field and the Bank Book Description field.

### ZOOM IN



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### Sales Order Price Update Flag

The Sales Order Report now includes an option to flag line items where the default price was overridden during data entry and show how the new price compares to the system calculated price.

### Customer Insights

Version 5.7 incorporates many enhancements intended to help you deliver exceptional customer service, including the ability to view the profit margin in the Pricing View. This allows you to offer the best possible price quote to your customer, while protecting your profit margin.

A link on the e-mail address provides a one-click method to create a new message in Outlook.

### Recurring Returns

Perhaps your business processes require recurring returns, such as returning buckets or pallets to your vendors. If so, you'll appreciate that Version 5.7 includes the same Recur functionality in Return Entry that you currently have in Sales Order Entry. Now you can set up returns that are automatically recurred based on your preferences; you can even have the return recur until a certain balance is met.

### Processing Company ID

If your workload requires you to operate within multiple companies, this feature will be a welcome one. The new Processing Company ID Menu Header helps you reduce the possibility of errors when processing data for two or more companies. The company name is displayed in the header of the screen allowing you to double-check quickly that you are in the correct company before proceeding with your processing.

### Fill Weight

Many batch manufacturing companies are required to report the fill weight of finished goods to the customer. In Version 5.7, you now can print the fill weight of finished goods on your Sales Order and Invoice forms. The fill weight allows you to determine how much (measured in weight) of a formula has been put into a container.

### Ingredient Listing

It now is a simple matter to find the total percentage of a single ingredient when reviewing the Multi-level Formula Ingredient Report. The new Ingredient Listing feature allows you to run the Multi-level Formula Ingredient Report and select to combine like ingredients into a single line with the accurate percentage of the total mix. The new *Combine Like Items* option on the Multi-level Formula Ingredient Report gives you the information you need quickly, easily, and accurately.

### Project Cost Validation

Now you have the ability to specify which segments you would like to be validated in Project Cost. When entering most types of transactions, you must enter required segments, based on the segment validations defined in the Segment Validation Setup file. With this addition, you specify which segments require that validation.

### New Technology Support

Version 5.7 is Vista compatible, Windows 2008 Server (32 bit) compatible, and utilizes Pervasive SQL 10.

Give us a call with your questions about Sage PFW Version 5.7. 