Sage Pro ERP

System Manager and Customization Manager

System Manager

The Sage Pro System Manager module is the control center for the entire Sage Pro ERP system. Sophisticated tools are included in System Manager that ensure data integrity and streamline processing and deliver enhanced security management. With System Manager, you can configure system and workstation settings, user security, and more. The module's data dictionary provides utilities for viewing and maintaining database files and enables you to modify and create your own custom databases and indices. Flexible period-end and year-end closing routines allow you to process, archive, and purge transactions on a schedule tailored to fit the way you operate your business.
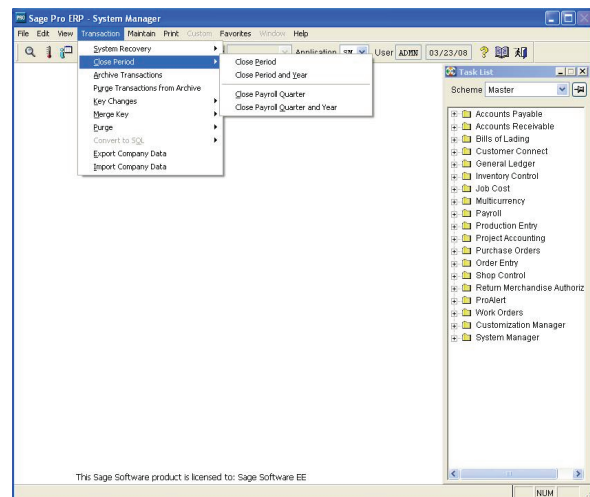
Desktop Features and Favorites Toolbar

- A Task List option on the Desktop enables you to choose a customizable Desktop menu to fit your unique business needs.

- Customize the Favorites Toolbar to include your most used tasks.

- Custom menus enable you to access as many as ten different user-defined custom options.

- Data Center icon located in the toolbar enables one-click access to view fields, browse tables, and maintain dictionary attributes. Choose a customizable desktop menu to fit your unique business needs, using Task Lists.

- Calendar view button added to all date fields.

- Desktop pictures, colors, and graphics can be added to each Company.

- Screens can be resized to allow expanded grids to view more data.

- System date is displayed in the standard tool bar.

Users/Workstations

- Gain tighter control with user security enhancements (improved SOX Compliance).

- Get more flexibility with an increased User ID field length of six characters.

- Password maintenance lets you control user access by function, time of day, and date range.

- Offers option to encrypt user passwords and names for added security.

- Records and reports user audit trails detailing time-specific information about user actions.

- Lets you designate whether users have read-only access or the ability to edit various records (such as inventory, customers, vendors, and General Ledger accounts).

- New Users Information Settings tab consolidates all user functions and settings in one easy-to-access, tree-view menu.

- User privileges, settings, reports, and data views can be easily selected and copied from one user to another and across companies.

- User-defined custom reports can be assigned to specific users or companies and selected from the option grid when printing.

Flexible period-end and year-end closing routines separate the closing, archiving, and purging of transactions to allow independent processing.

Fiscal Calendar and Period Close

- Flexible Fiscal Calendar includes up to 365 periods.

- Modify structure of existing calendars with the Fiscal Calendar maintenance.

- Flexible period-end and year-end closing routines separate the closing, archiving, and purging of transactions, to allow independent processing.

Working with Company Data

- Import company data directly from another Sage Pro installation.

- Enables you to change key values, such as customer, inventory, item, or vendor numbers throughout the system.

- Includes laser printing technology to produce high-quality, low-cost business forms on plain paper.

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- System Recovery utilities can update and verify database file structures and indices, clear user flags and file locks, delete unused temporary files, and clear the Error Log.

- Error Log provides System Administrator with powerful tools and information to track down system faults.

- Transaction rollback ensures data integrity and provides the ability to recover from interrupted transactions.

- Expanded Company ID field allows up to ten alphanumeric characters for an unlimited number of Sage Pro companies.

- Date & Time and Spell Check option buttons on all Notes fields.

- Import Data Wizard imports customers, vendors, items, AP invoices, AR manual invoices, employees, and General Ledger accounts in selected file formats to convert data more easily.

- User-defined search criteria available for dataviews and picklists.

Data Dictionary

- Rule tables provide data entry validation to ensure data input accuracy.

- Data dictionary stores information about application and custom database files, their fields and indices, data types, and program processes.

- Database containers ensure security and seamless access for better integration of third-party products.

- Data dictionary lets you expand key fields to user-defined lengths.

DataDrillers and Drilldowns

- Data views provide instant custom-defined views of your data from any file in the data dictionary using the DataDriller.

- Drilldown capabilities are available from many data fields throughout Sage Pro.

- Custom drilldowns can easily be set up from any field.

- Supports drilldown views in selected reports.

Key Reports

Each report can be customized from a matrix of user-selected options: Display, print, export to a spreadsheet, save as PDF, fax, send by e-mail, or save on disk. Some of the reports included are:

- User Activity
- Disk Usage
- Key Change Audit Log
- Key Change List
- Setup Information

Executive Dashboard (exclusively for Sage Pro 200)

The Sage Pro Executive Dashboard gives you and your executives the ability to check the pulse of your company in seconds. Instant access to business intelligence allows you to identify issues easily and work to prevent problems before they happen. You and your managers will appreciate the Executive Dashboard's accessibility—viewable either at the office or over the Internet at any time. You can quickly spot issues, filter through module information, drill down to source transactions, and communicate with stakeholders, all from one central location.

Features

- Save time digging through data and easily prioritize your most pressing issues. Click through five smart tabs and you're instantly updated on the health of your business.

- Chart trends and track progress for a variety of important factors using the Favorite Views tab.

- Remotely manage customer records and review customer-related inquiries such as Payments, Receivables, Invoices, and Orders.

- Stay up to the minute with the Business Status Report (BSR) screen, which includes cash balances, forecasts, and inventory values.

- Remotely manage vendor records and review vendor-related inquiries.

- Drill down into your Accounts Payable, Accounts Receivable, Order Entry, or Purchase Order modules from one handy General Ledger account view.

- While working through a Web browser, use Contact view to look up your customer and vendor information through easy-to-sort lists.

- The Message Center allows you to communicate proactively with your team. Now with remote access through the Dashboard, you gain even more flexibility to focus on your business. Plus, check your messages, return calls, and track order placement—all from one screen.

Customization Manager

The Sage Pro Customization Manager module enables you to customize your Sage Pro screens and preserve your changes in future builds. This powerful tool is designed to enable you to make user-specific changes to your Sage Pro screens without requiring access to source code. This saves you from having to redo modifications every time you update to a new version.

Features

- Create custom screen forms as subclasses of existing forms and make custom screens available to specific users /companies.

- Create Microsoft ® Visual FoxPro expressions that define the conditions in which a particular custom form is to be launched.

- Enables Solution Providers to deploy custom screen forms without changing the existing Sage Pro form.

- Provides maximum flexibility to change screen object properties such as field name labels, fonts, colors, and field sizes on Sage Pro screen forms.

- Enables Customization Manager to be added to the Favorites toolbar, providing access to the module from within any other Sage Pro application.

- Enables export and import of customizations between companies.

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