

SAGE PFW

Version 5.6 Release Guide





New Ways to Improve Efficiency, Increase Performance, and Better Manage Your Business— Sage PFW v5.6

Your Sage PFW ERP solution may already be doing a great job, but it could be doing much better. We're constantly developing new ways to improve Sage PFW—all based on requests from customers just like you! Best of all, you can take advantage of the new features with minimal or no training. That's because the basic workflow in version 5.6 is virtually identical to your current system. We kept what you like and simply give you more ways to make your life easier.

Let us show you how you can leverage the Sage PFW v5.6 enhancements to get the most out of your software investment. Focusing exclusively on the new features with a combination of graphics, handy references, and real-world examples—this guide will quickly put you in-the-know!

You may be wondering how you can get your hands on all of the dynamic new features packed into this version. Great news! You are entitled to all software upgrades and maintenance updates as part of your Sage PFW ClientCare plan, along with many other features such as award-winning support, which helps keep your system running smoothly. In addition to unlimited phone, fax, and e-mail support, your ClientCare plan offers you access to Sage Software Online, a Web-based technical resource, available 24-7, providing the same award-winning troubleshooting access to the support knowledge base used by Sage Software technical analysts. If your Sage PFW ClientCare plan has lapsed, you don't have to miss out, simply contact us at 888-928-8989 today.

Improve Efficiency

We have added many great new features that enable you to find and navigate information throughout Sage PFW in record time.

Advanced Lookup Engine

The Advanced Lookup Engine was introduced in v5.5 as a way for you to take control of the way you locate information. The Advanced Lookup Engine enhances the same lookup methods you are comfortable using today with a host of powerful new options that add flexibility and help you increase efficiency. Now, you have the power to set up lookup parameters in any way that best suits your business in the Sage PFW Transaction File Maintenance Menu Items. Quickly locate transaction details to assist with auditing, troubleshooting, or finding specific historic data. You can even export the results to Microsoft Excel or print them for reference.

Caption Hyperlinks

Maximize user efficiency by enabling users to quickly and easily navigate file maintenance tables with a single click of the mouse, saving valuable time and keystrokes when accessing information. For example, if you're entering a voucher, you may need to double check to see if the vendor is selected to support 1099s. Simply click on the Vendor Key caption and Vendor File Maintenance will automatically launch the selected Vendor on the screen. You can then update the Vendor table, close the screen, and continue to process your voucher. This functionality is available throughout Sage PFW for quick access and editing of your file maintenance records. Imagine the time you can save!

"The entire system is very user friendly and intuitive, and the process manufacturing features are ideal for our operations. The Caption Hyperlinks are very useful when a customer is on the phone with customer service. They can quickly jump right to another screen without having to minimize the current one."

Robert O'Connor
MIS Manager
Franklin Foods

Improved Find Historical Functionality

The power of our Templates Feature has now been combined with the Find Historical Feature. Now you take control of how the Find Historical feature works in each entry screen by using Templates to specify which information will be populated. For example, when you enter a sales order using the Find Historical feature, you can select if you want the price to populate from the historical sales order. If you select not to populate the price, then the system will determine the price from the current system information.

Better Auditing and Data Tracking

We've enhanced several features to give you added flexibility and more control over your information.

Retain Original Invoice Number

You can now optionally select to maintain the original invoice number when you reprint an invoice before the invoice is posted. For example, you print an invoice and do not post it and the invoice number 19473 is assigned. You then choose to reprint the invoice, selecting this new option, the invoice is reprinted with the original invoice number, 19473. If this option is not selected, a new invoice number will be assigned (as in previous Sage PFW versions). This new option allows you to decide how the invoice number is handled when reprinting and provides better auditing capabilities.

Invoice History Report

The Invoice History Report has been enhanced to be a true invoice reprint. The report will now show all information from the original invoice. It can be printed or sent to your customers by e-mail. You can utilize this enhanced report to ensure your customers are paying you on time and keep cash flow moving through the business.

Pervasive AuditMaster Integration

Achieve better auditing and save time when troubleshooting which program has made a change to the data. Context information is important to understand or track the flow of data within the system, or to help identify bugs or errant Transaction File Maintenance changes. Sage PFW can now designate the menu item or process as a context for the data changes of front-end applications.

Universal Notes and Attachments

Category Field

It's never been easier to quickly find the Notes or Attachments you need. Simply type in any category you deem appropriate for the note. The category can then be used again when you or other users create notes. If all notes or attachments assigned to a specific category are removed, then the category will automatically be removed from the lookup.

Creator and Creation Date

Quickly sort Notes and Attachments by the user that created the entry or the date it was created.

Order Entry Pro and Purchasing Pro

If you use the Order Entry Pro and Purchasing Pro modules you can now benefit from the powerful Universal Notes and Attachments functionality. This new functionality will not interfere with your current notes functionality—only give you another more detailed method of tracking notes and attachments on your Sales Orders and Purchase Orders.





Effective Management of Your Business

Get better visibility into your business and take better control over your customer and vendor management.

Expanded Address Support

Now you have more room to grow, as we have increased the Customer Name and Address Fields sizes! The larger field sizes now allow you to easily accommodate international or other addresses that tend to be larger due to the language or address format.

Field	Previous Field Size	New Field Size
Customer Name	30	50
Customer Address1	30	50
Customer Address2	30	50
Customer Address3	30	50
Customer City	15	40
Customer State	2	40

To minimize the impact for customers to move up to v5.6, we have not upgraded Sage PFW reports to utilize the expanded name and address field sizes. However, the expanded fields will be available in all reports. You will need to modify your reports and forms to fully support the new field sizes.

"Great [Multiple Customer Contacts] feature! Wonderful! This is exactly what our business needed."

Greg Seales
MIS Manager
East Shore Specialty Foods

Multiple Customer Contacts

Simplify your contact details with our new Contact File Maintenance and Contact Type Tables. The Contact Type allows you to define the role the contact fits in your customer's business such as purchasing, accountant, and CEO. The Contact File Maintenance allows you to store the contact name, address, time zone, five phone numbers, and three e-mail addresses. You can track unlimited contacts in the table. The Customer File Maintenance Table has been updated to allow you to relate five contacts to each customer. You can quickly access the contact details using a new hyperlink to the contact table.

Vendor Status

Simplify your vendor relationship management with the new Vendor Status functionality. You can set vendors to **Active**, **Active-No new purchases**, or **Inactive**. Only Active vendors can be displayed in the vendor lookup window. In addition, you can only enter new vouchers for Active vendors, as vendors with the status of Inactive or Active-No new purchases will be red flagged. The system will prevent you from changing the status on a vendor with any open vouchers and you can view a list of the associated vouchers. Entry of new vouchers will now be more accurate and efficient than ever before.

Customer Status

Previously a new Customer Status field was introduced in the Customer Maintenance screen to reduce data entry errors and provide more flexible reporting options. In v5.5, the Customer Status field could be set to **Active** or **On Hold**. In v5.6 we have added additional Customer Status options—including **Inactive**, **Prospect**, and **In Collections**. Leverage all five statuses to increase the control over the types of transactions that you can process for your customers.

Tip: You can limit the customer accounts that are displayed for selection by establishing a default lookup view using the Advanced Lookup Engine. This will restrict the customer selection list to display only customers with an Active status.

Effect of Customer Statuses in Sage PFW Menu Items

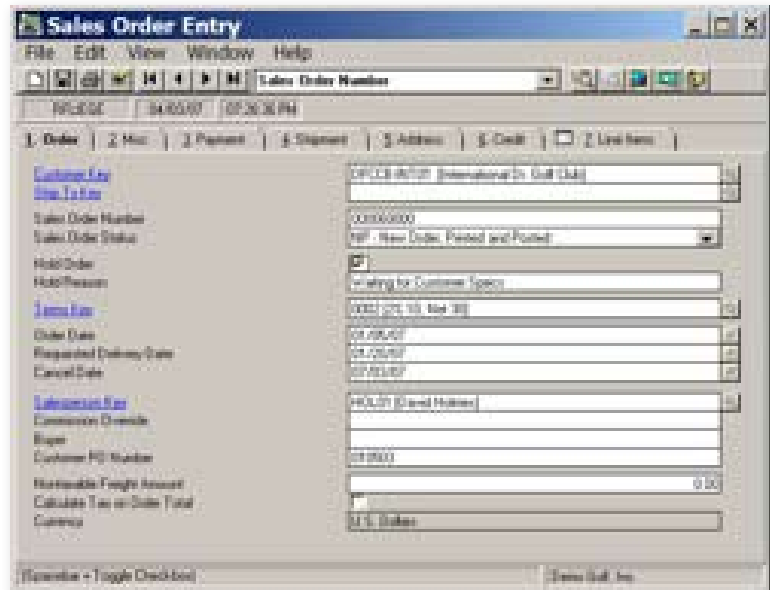
Menu Item / Process	Active	On Hold	In Collections	Prospect	Inactive
Cash Receipts Entry	✓	✓	✓	-	-
Cash Receipts Adjustment	✓	✓	✓	-	-
Credit Memo Entry	✓	✓	✓	-	-
Invoice Entry	✓	✓	✓	-	-
After the Fact Invoice Entry	✓	✓	✓	-	-
Assess Finance Charge	✓	✓	✓	-	-
Void Posted Receipt	✓	✓	✓	-	-
Sales Order Entry – Save Order	✓	✓	-	-	-
Sales Order Entry – Save Quote	✓	✓	-	✓	-
Shipment Entry	✓	-	-	-	-
Sales Order Shipment Entry for Documents (Order Entry Pro)	✓	-	✓	-	-
Return Entry (Order Entry Pro)	✓	✓	✓	-	-
Return Receipt Entry (Order Entry Pro)	✓	✓	-	-	-
Pick List (Order Entry Pro)	✓	-	-	-	-
Production Batch Entry	✓	-	-	-	-
Purchase Order Entry (Drop Shipment)	✓	-	-	-	-

Hold Sales Order Feature

Improve customer satisfaction by staying on top of the entire sales order process by selectively Holding individual orders.

You can hold an order for completion, customer specifications, credit issues, or for any other reason. Facilitate communication with your customers and other employees by designating a reason for the hold directly on the order.

This new functionality works cohesively with the improved customer status feature to help save you time and keep order management as efficient as possible.



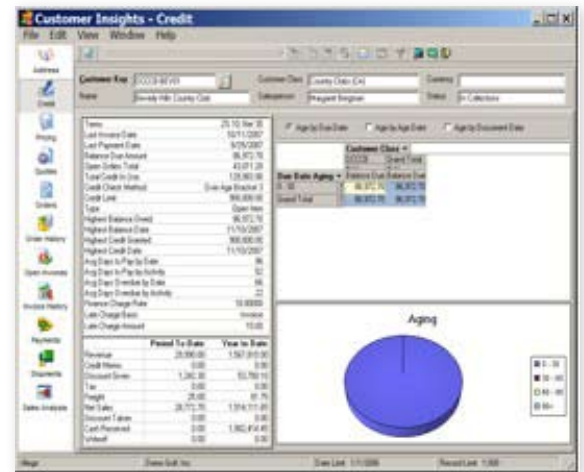


Customer Credit Tracking Fields and Calculations

Get better visibility into your customer's credit history. You can now track your customer's SIC or NAIC Code, Credit Risk, D&B Number, and Credit Ratings for three credit bureaus in the Customer File Maintenance Table.

New credit calculations are stored in the Customer Activity Transaction File Maintenance Table and are visible in Customer Insights:

- Highest Balance Owed and Date
- Highest Credit Granted and Date
- Average Days to Pay by Date & by Activity
- Average Days Overdue by Date & Activity



Tip: These new fields can be added to any Sage PFW reports by customizing the report using the Crystal Designer and the unique customization hierarchy in Sage PFW.

Increase Performance

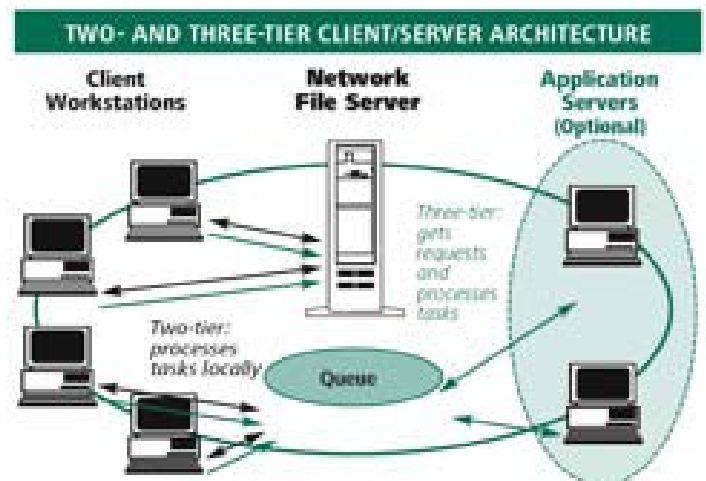
You can only work as fast as your computer. Sage PFW v5.6 gives you additional tools to ensure that you are getting the most out of your system performance.

Data Optimization Utility

You can now rebuild line item files without affecting line item order within entry screens. Plus, you can utilize the Pervasive Control Center to rebuild all of your company data files at once. It helps keep your system running at optimal performance levels!

Third-Tier Processing and Scheduling Capability

Customers with the Inventory Pro and MRP modules can now optimize performance with the innovative three-tier architecture of Sage PFW. Tasks that are processed remotely can also be scheduled to run during off-peak hours, saving time, eliminating server bottlenecks, and substantially enhancing overall system performance.



Certified on Microsoft Vista

Sage PFW v5.6 is certified on the new Microsoft operating system, supporting the Vista Business and Ultimate Editions. Microsoft Vista is now available and is being included on new computer purchases. Vista offers several improvements to security and desktop management. The security improvements will help minimize the likelihood of malware attacks, unfortunately it also prevents legitimate software applications from operating correctly since many applications require either full or administrator rights.

We encourage you to double check Microsoft Vista compatibility for all Sage Software products and any third-party products before upgrading. You must run Pervasive version 9.6 and Microsoft FRx 6.7 R09 with Microsoft Vista. These products are available to download from Sage Software Online, as well as an informative FAQ document. The following table displays the Vista capable versions of products integrated with Sage PFW:

Product	Version
Abra Payroll	7.6
Abra Link	5.1
Crystal Reports®	10
Microsoft FRx*	6.7 (R09)
Pervasive SQL*	9.6
Sage FAS Fixed Asset Management	2007.2
Sage FAS Fixed Asset Management Universal Link	5.3
StarShip	9.9

*Available for download from Sage Software Online

NOTE: *Business Alerts Version 4.1 and Pervasive AuditMaster 6.3 are server-based programs and therefore are not Vista Capable, as Vista is a Client Operating System. Both programs have a Client Console that cannot be used on a Vista workstation.*

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5PFW079 09/07 07-4274/0907