

Sage 500 ERP



Office

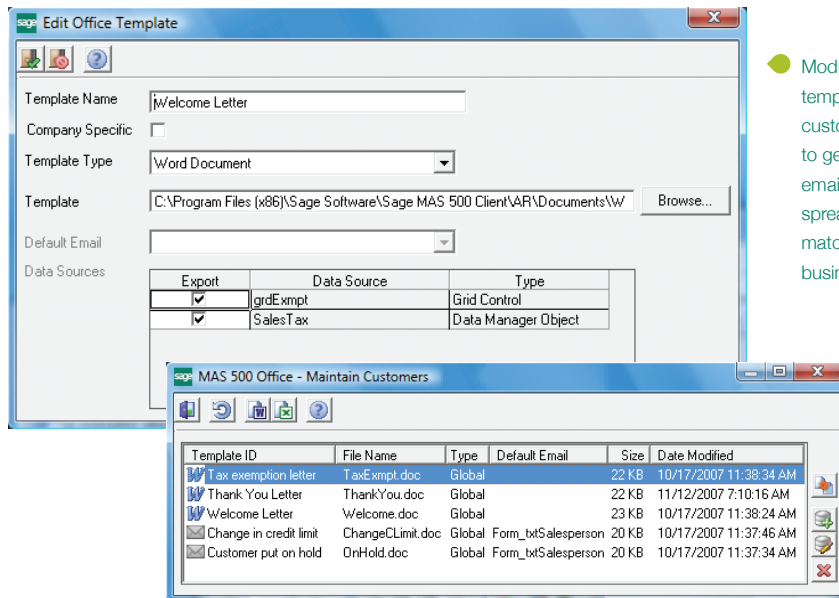
Build Strong Customer Relationships

The Sage 500 ERP (formerly Sage ERP MAS 500) Office module helps you use the power of automation to build stronger, more lasting customer relationships through enhanced communications. It is a valuable component that is included with Sage 500 ERP.

With Office, you can use predefined, customizable templates to help you automatically (or manually) generate business communications that incorporate application data. You can save time while boosting productivity as you create a wide range of highly customized documents, including business letters, emails, or spreadsheets, without ever leaving Sage 500 ERP.

Any authorized user in your organization can quickly and easily create a new template or one-time document without any programming knowledge. Simply open an existing Sage 500 ERP template, make any necessary modifications, and save the new template.

Through Office, you can leverage familiar productivity tools to gain new efficiencies in business communications and customer service. For example, press a toolbar button on the Customer Maintenance screen or Business Insights Explorer customer inquiry, and Office launches Microsoft® Word and populates a customized dunning letter with Sage 500 ERP data, including customer name, address, and aging information—all without your having to type a word! You can also use Sage 500 ERP spreadsheets as budget analysis tools to transfer business data from Sage 500 ERP tasks into Microsoft Excel® for what-if analysis.



● Modify standard templates or create custom templates to generate letters, emails, and spreadsheets that match your unique business needs.

● Sage 500 ERP Office has been implemented in all data entry tasks, so custom documents and spreadsheets can be generated effortlessly from any maintenance or transaction entry screen.

PREDEFINED TEMPLATES

- New Customer Welcome Letter
- Inactive Customer Letter
- Accounts Receivable 30-Day and 120-Day Dunning Letters
- Tax Exemption Letter
- Customer Thank You Letter
- Customer on Hold Email
- Customer Change in Credit Limit Email
- Customer Exceeded Credit Limit Email
- Problem With Vendor Account Balance Email
- Budget Planning Analysis Spreadsheet
- Salesperson Sales History Analysis Spreadsheet
- Customer Sales History Analysis Spreadsheet
- Edit Commissions Spreadsheet
- Customer Class History Analysis Spreadsheet
- PO Matching Analysis Spreadsheet
- Standard Journal Entry Spreadsheet
- Transaction Journal Entry Spreadsheet

SAGE 500 ERP SOLUTIONS

- Financials and Project Accounting
- Distribution and Manufacturing
- CRM and E-business
- Human Resources and Payroll
- Customization and Integration
- Business Intelligence

“Sage 500 ERP has been a lifesaver for us. It’s trimmed 20 percent off administration time, and will have paid for itself in a little over a year.”

Kurt Gail, CFO
Central Distributors of Beer

Create New Templates

Create a wide choice of templates for your letters, emails, and spreadsheets.

- Create templates using a process as simple as dragging and dropping fields into your Word documents or export directly to Excel spreadsheets for formatting.
- Make templates available to all companies or a specific company.

Generate Templates

Easily select existing templates and generate customized communications.

- Activate Office from the current Sage 500 ERP task to display a list of templates.
- Automatically generate the template with all appropriate information.

Sage 500 ERP Office Functions

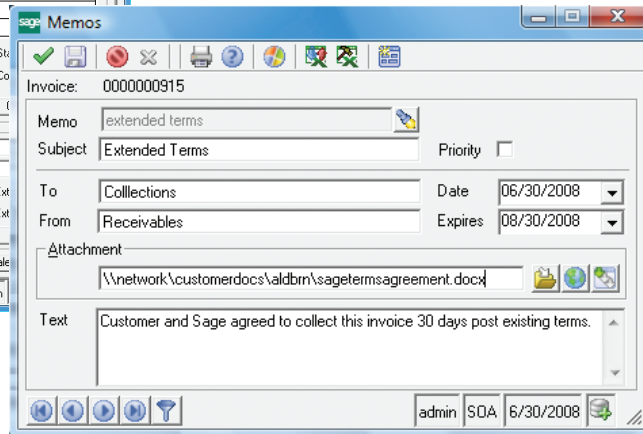
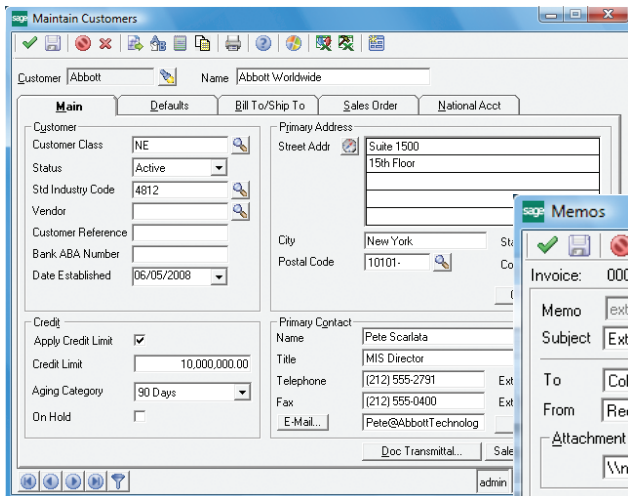
Facilitate the launch of frequently performed operations from the Office toolbar.

- Generate Templates—to view or modify an existing document prior to printing.
- Print Template.
- Send Mail Note.
- Create New Templates.
- Add New Attachments.
- Display Data Objects—to paste Sage 500 ERP fields into a new or existing template.

Easy Access to Documents

Leverage the Sage 500 ERP memo manager to attach a variety of files directly to Sage 500 ERP records.

- Attach any desktop file, including Word documents, Excel spreadsheets, scanned images, photos, drawings, notes, voice, and multimedia files, to any Sage 500 ERP masterfile or transaction record.
- Attach any file or Internet address (URL) to a Sage 500 ERP entity, such as a customer, vendor, salesperson, or account.
- Insert attachments at the transaction or masterfile level.
- Add an attachment and memo manager displays the attachment in a folder specific to the entity.
- View the document or file at any time.
- Associate or attach a scanned image of a signed contract to a vendor record or an image of an invoice to a customer record.



Memo manager allows you to easily attach any desktop file, including Word documents, spreadsheets, and images, to Sage 500 ERP transaction records or master files.

- Attach any memo, file, or Internet address (URL) to an entity such as a customer, vendor, salesperson, or account.

About Sage

Sage is a leading global supplier of business management software and services for small and midsized businesses. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs more than 12,300 people and supports more than 6 million customers worldwide. For more information about Sage in North America, please visit the company website at www.SageNorthAmerica.com. Follow Sage North America on Facebook, <http://www.facebook.com/SageNorthAmerica>, and Twitter, <http://twitter.com/#!/sagenamerica>.

