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### ***Back in Business***

In this article, the senior vice president and general manager of Sage Pro ERP reflects upon the changes in our economy over the last year and how those changes will influence our business in the near future.

### ***Save the Date: Sage Online Educational Symposium***

The Sage Online Educational Symposium is coming soon! Learn more about this unique virtual conference and how easy it will be to attend.

### ***How to Use the Recalculate History Feature***

Recalculating history is done to sum up the total of transactions and populate the period buckets for Customer, Item, and Vendor history inquiries. Learn how to recalculate history during a monthly close or at any time

### ***Printing AR Refund Checks***

The process to print AR refunds has been simplified in the most recent version of Sage Pro. Learn how to do this task and how these improvements can benefit your company.

### ***New! Sage Credit Card Processing—Integrated with Sage Pro***

Did you know you can process credit cards using your Sage Pro software? See the many benefits to adding Sage Payment Solutions to your system.

### ***Take Advantage of Free Monthly Training Sessions!***

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### ***Network with Fellow Sage Pro Users***

Facebook and LinkedIn users: You can now network with other Sage Pro users on your favorite social networking sites!

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## In this issue

- ▶ [Back in Business](#)
- ▶ [Save the Date: Sage Online Educational Symposium](#)
- ▶ [How to Use the Recalculate History Feature](#)
- ▶ [Printing AR Refund Checks](#)
- ▶ [New! Sage Credit Card Processing—Integrated with Sage Pro](#)
- ▶ [Take Advantage of Free Monthly Training Sessions!](#)
- ▶ [Network with Fellow Sage Pro Users](#)
- ▶ [Sage Contacts](#)

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## Back in Business



### Dear Valued Sage Pro ERP Customer:

What a difference a year makes. With the economy taking us on a wild ride over the past 12+ months, it's been difficult to predict where markets will end up, but I'm glad to see things have settled down and the worst appears to be behind us. That's not to say we are in the same place we were before. In fact, we are in a very, very different place, and we have different behaviors and expectations with regards to our buying habits. As we approach the end of the year, I'd like to share with you some changes I've observed and how I believe they will influence the way we all look at the world around us.

### The value of simplicity

In an increasingly complex world, it has become important to be able to find simplicity. In the past, for example, when I was thirsty and stopped into a convenience store for a drink, it was overwhelming to look at row after row of beverages to choose from, and I'd often leave without making a purchase. In recent articles I've been reading, many retailers are reacting to similar situations by narrowing their offerings to a few, top-quality items rather than a plethora of random offerings. We should all keep this in mind when determining what we want to provide to our own customers.

### Cost-conscious environmentalism

When economic times were better, it was easy to be green, even if it cost more. But in today's world, we aren't as likely to spend a great deal more in order to be more environmentally friendly. Rather, it's the opposite. We are attempting to spend less and at the same time trying to help the planet. For instance, many won't spend an additional \$10,000 to buy a hybrid automobile but will turn down the thermostat and turn off unused lights. This is having an effect two ways: We are personally reducing our energy consumption, and we are forcing manufacturers to find less expensive ways of bringing green products to market. This in turn means we as businesses need to be acutely aware of the latter.

### Utilizing business intelligence

Within our own companies, we are finding it's more important than ever to have a handle on our business to ensure we are spending at appropriate levels (not too little and certainly not too much), that our revenue is flowing as predicted, and that sales forecasts can be developed more frequently. All of this requires a constant stream of accurate data. In order to get this

## In this issue

- ▶ [Back in Business](#)
- ▶ [Save the Date: Sage Online Educational Symposium](#)
- ▶ [How to Use the Recalculate History Feature](#)
- ▶ [Printing AR Refund Checks](#)
- ▶ [New! Sage Credit Card Processing—Integrated with Sage Pro](#)
- ▶ [Take Advantage of Free Monthly Training Sessions!](#)
- ▶ [Network with Fellow Sage Pro Users](#)
- ▶ [Sage Contacts](#)

data, we need software and systems that not only deliver a large number of reports, but also allow us to customize and manipulate this information to ensure it is tailored to our unique needs. It's important to not just have the information, but to actually use it.

It's amazing the way the recent downturn, then upswing, in the economy has changed the way we behave, both personally and in business. During the boom time, a lot of behaviors that had always been "nice to haves" became "need to haves," while the downturn is making us more responsible both to ourselves and the environment. In order for us to thrive in this new world and provide our own customers with products and services that have evolved to meet everyone's new expectations, we must recognize that we and those around us have changed. What will be really interesting to see is which of these behaviors become permanent fixtures in the years ahead, and which will fall to the wayside.

Sage is proud to play a part in your company's success, and we hope by working together, we can all look forward to a simpler, greener, and more prosperous 2010.

Regards,



Sam Hunter  
Senior Vice President and General Manager

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### ***Save the Date: Sage Online Educational Symposium***

Mark your calendar now to attend the Sage Online Educational Symposium March 18, 2010. During this unique virtual conference, you'll have the opportunity to learn from others, discuss business topics, and further educate yourself about your Sage Pro solution. And it's all available from the comfort and convenience of your own desk—no travel required! Be on the look out for an e-mail invitation and additional information coming in January!

### **In this issue**

- ▶ [Back in Business](#)
- ▶ [Save the Date: Sage Online Educational Symposium](#)
- ▶ [How to Use the Recalculate History Feature](#)
- ▶ [Printing AR Refund Checks](#)
- ▶ [New! Sage Credit Card Processing—Integrated with Sage Pro](#)
- ▶ [Take Advantage of Free Monthly Training Sessions!](#)
- ▶ [Network with Fellow Sage Pro Users](#)
- ▶ [Sage Contacts](#)



## How to Use the Recalculate History Feature

The purpose of recalculating history is to sum up the total of transactions and populate the period buckets for Customer, Item, and Vendor history inquiries. These can be accessed from their respective maintenance screens. When clicking on the Inquiry button from either the Customer or Vendor maintenance screen and selecting "History" from the option list, you can see sales and purchase history respectively for the last 24 periods. For Item Inquiries, the 36-Month Sales/Usage option should be selected from the inquiry type list to view three years of \$ Sales, Qty Sales, and Period ASP. The information displayed can then be printed or graphed.

Prior to Sage Pro ERP v.7.4, the period buckets would get updated at the time of the close. The periods would reflect the values at the time the application was closed, so if the application was not closed until the middle of the month, the totals would be lower than they would be had they been done at the end of that month. If a close was not done for a whole month, that period would have zero totals.

Beginning with Sage Pro ERP 7.4 and 7.5, a Recalculate History option was introduced for Customer, Item, and Vendor. The transaction dates for each application are grouped and totaled based on the defined beginning and ending dates for each period in the fiscal calendar. These values update period totals for the various inquiries.

The application tables updated in Sage Pro 7.4 and 7.5 are APVSUM, ARCSUM, and ICISUM for Vendor, Customer, and Item History respectively. The APVHST, ARCHST, and ICHIST application tables are no longer used.

Recalculating history can be done during a monthly close or at any time with the following steps:

1. Open System Manager.
2. Under the **Transaction** menu, point to **System Recovery, Recalculate History**, and click **Customer, Item, or Vendor**.
3. Enter the company to recalculate.
4. Enter the Starting Fiscal Year and Starting Fiscal Period.
5. Enter the Ending Fiscal Year and Ending Fiscal Period.

## In this issue

- ▶ [Back in Business](#)
- ▶ [Save the Date: Sage Online Educational Symposium](#)
- ▶ [How to Use the Recalculate History Feature](#)
- ▶ [Printing AR Refund Checks](#)
- ▶ [New! Sage Credit Card Processing—Integrated with Sage Pro](#)
- ▶ [Take Advantage of Free Monthly Training Sessions!](#)
- ▶ [Network with Fellow Sage Pro Users](#)
- ▶ [Sage Contacts](#)

Any starting and ending fiscal period and year can be entered if the date is found in the fiscal calendar. These updates can be seen from the Customer, Item, and Vendor Maintenance screen by clicking on the **Inquiry** button, which will display the last 24 or 36 months of data.

The end dates are defined in the fiscal calendar. Period 1 end date will be the period before the current fiscal period. For example, if your current fiscal period is defined with a date range of 05/01/09 – 05/31/09, the end date of period 1 will be 04/30/09. To see transactions recalculated from history after 04/30/09, click on the **All Pds** button at the top of the Customer, Item, or Vendor History screens. This brings up a data driller that displays all archived transactions regardless of the period and year.





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## Printing AR Refund Checks

The process to print accounts receivable (AR) refunds has been simplified in the most recent version of Sage Pro. Read on to learn how to complete this task and how these improvements will benefit your company.

Prior to Sage Pro ERP v7.4, the following had to be done to perform a refund:

1. Create a negative cash receipt.
2. Create an AP payable for a miscellaneous vendor and distribute to a cash account.
3. Create a check for the refund through AP.

Introduced in Sage Pro 7.4, the process has now been simplified with the ability to print AR refund checks in the following way:

1. Post negative cash receipt for the refunded amount.
2. Apply the negative cash receipt to the open credits as selected.
3. Print the refund check.

The refund feature can be accessed from AR. Under the **Transaction** menu, point to **Enter Cash Receipt**, and click **Refund**.

Benefits:

- You can process refunds from AR directly.
- You can combine multiple credit memos into one refund.
- Customer statements will reflect accurate balances.
- Generates bank reconciliation entries automatically.
- Include all the benefits of regular check printing (check recover, test printing, stub printing, and more).
- You can consolidate credit memos from multiple National Account customers into one refund check.
- Remit a check to another National Account customer.

## In this issue

- ▶ [Back in Business](#)
- ▶ [Save the Date: Sage Online Educational Symposium](#)
- ▶ [How to Use the Recalculate History Feature](#)
- ▶ [Printing AR Refund Checks](#)
- ▶ [New! Sage Credit Card Processing—Integrated with Sage Pro](#)
- ▶ [Take Advantage of Free Monthly Training Sessions!](#)
- ▶ [Network with Fellow Sage Pro Users](#)
- ▶ [Sage Contacts](#)

- The system is privilege protected.
- Void refund checks with complete audit trail.
- Ensures that there is enough open credit for the customer/national account before cutting a refund check.

For more information on using the new AR refund check, feature please refer to the AR user guide found in your DoconDisk.

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### ***New! Sage Credit Card Processing – Integrated with Sage Pro***

Did you know you can process credit cards using your Sage Pro ERP software? Sage Payment Solutions offers integrated payment processing, making it easy to pre-authorize transactions using the Order Entry module and post-authorize after the sale is complete—without leaving the software. Best yet, when you use the Sage Pro Accounts Receivable module, transactions automatically update your accounts receivable. Check out some of the other benefits of processing with Sage Payment Solutions:

- Seamless integration with Sage Pro version 7.5 software
- Free payment processing module
- Connects sales orders and accounts receivable functions with credit card authorization and settlement
- Creates pre-authorization transaction during the order process and completes the sale by performing a post-Authorization transaction
- Full 24/7 online transaction reporting
- Affordable Sage in-house processing rates for Sage Pro customers

For more information on how you can benefit from Sage integrated payment processing call 888-477-3694 or visit [www.sagepayments.com/sagepro](http://www.sagepayments.com/sagepro) for a free payment processing consultation or to learn more.

### In this issue

- ▶ [Back in Business](#)
- ▶ [Save the Date: Sage Online Educational Symposium](#)
- ▶ [How to Use the Recalculate History Feature](#)
- ▶ [Printing AR Refund Checks](#)
- ▶ [New! Sage Credit Card Processing—Integrated with Sage Pro](#)
- ▶ [Take Advantage of Free Monthly Training Sessions!](#)
- ▶ [Network with Fellow Sage Pro Users](#)
- ▶ [Sage Contacts](#)

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### Take Advantage of Free Monthly Training Sessions

Tech Tuesdays are a series of monthly, live, Web-based courses designed to help you become more proficient in using your Sage Pro software. Courses are held in real time, so you can interact with your instructor and classmates just like you would in a classroom.

From now until March 2010, the \$99 per-course fee is being waived, so you can now take advantage of this valuable learning opportunity—free!

Experienced instructors cover topics in Tech Tuesdays that impact your day-to-day business activities. You'll come away from each session with relevant skills and knowledge to help you work smarter and easier, boosting your efficiency.

Title	Date
Year-End Closing	December 15, 2009

Click [here](#) to see a list of courses.

### In this issue

- ▶ [Back in Business](#)
- ▶ [Save the Date: Sage Online Educational Symposium](#)
- ▶ [How to Use the Recalculate History Feature](#)
- ▶ [Printing AR Refund Checks](#)
- ▶ [New! Sage Credit Card Processing—Integrated with Sage Pro](#)
- ▶ [Take Advantage of Free Monthly Training Sessions!](#)
- ▶ [Network with Fellow Sage Pro Users](#)
- ▶ [Sage Contacts](#)

Sage Pro ERP

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Contact Us

Fall 2009 Newsletter PDF

Online  
Community



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### Network with Fellow Sage Pro Software Users

The Sage Pro team is proud to announce that you can become a fan of Sage Pro on Facebook and can join our group on LinkedIn. By joining these social networks, it is easier than ever to network with fellow users and receive updates about your Sage Pro software.

If you are already registered on these sites, just click the links below. If you are not using these services, why not join? They are both free to join as a standard user, and these sites are a great way to keep in touch with colleagues and friends.

Please click on the links below and join us today.

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<a href="#">Sage Pro ERP</a>	<a href="#">Sage Pro ERP Users</a>

### In this issue

- ▶ [Back in Business](#)
- ▶ [Save the Date: Sage Online Educational Symposium](#)
- ▶ [How to Use the Recalculate History Feature](#)
- ▶ [Printing AR Refund Checks](#)
- ▶ [New! Sage Credit Card Processing—Integrated with Sage Pro](#)
- ▶ [Take Advantage of Free Monthly Training Sessions!](#)
- ▶ [Network with Fellow Sage Pro Users](#)
- ▶ [Sage Contacts](#)

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Sage Pro ERP

Contact Us

Fall 2009 Newsletter PDF

Online  
Community



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#### Sales

Customer account manager: [Sean Munzert](#)  
Phone 1-800-368-2405 x3166

#### Support and Services

Phone: 1-800-253-1372  
Fax: 1-604-304-3145  
[E-mail Us](#)

#### Customer Community and other Social Networking Pages

Valuable resources are available for all Sage Pro software customers. The Sage Pro customer community is designed to enable you to engage and interact with Sage Pro professionals and other users through a variety of different communication forums and tools. Register at [Community.SageProERP.com](#) today!

Also, visit us on [Facebook](#) and [LinkedIn](#)!

#### Learning Services

1-877-920-9600, option 2  
[www.sageu.com](#)

#### Sage Webcast Center—**NEW!**

The Sage Webcast Center has been redesigned with easier-to-navigate product drop-down menus and a simpler interface. The new design makes it even easier for you to view Webcasts about Sage's products and solutions. As with all Webcasts, there is no charge to attend!  
[Visit the new Sage Webcast Center](#)

#### Product Updates

Download files containing patches and updates for your Sage Pro software.  
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### In this issue

- ▶ [Back in Business](#)
- ▶ [Save the Date: Sage Online Educational Symposium](#)
- ▶ [How to Use the Recalculate History Feature](#)
- ▶ [Printing AR Refund Checks](#)
- ▶ [New! Sage Credit Card Processing—Integrated with Sage Pro](#)
- ▶ [Take Advantage of Free Monthly Training Sessions!](#)
- ▶ [Network with Fellow Sage Pro Users](#)
- ▶ [Sage Contacts](#)

**Feedback**

Receiving feedback from customers who actually use the product on a day-in day-out basis can help us identify features that can make your tasks easier. If you have an idea or suggestion for something that you would like to see on the Sage Pro Web site or within Sage Pro, please visit our [Sage Pro ERP Product Feedback Form](#).

**Customer Loyalty**

We hope that you find the Sage Pro Source Newsletter both helpful and informative, as your business success is important to us. With this said, we want to make the Sage Pro Source the best resource for you. Please feel free to provide us with your feedback, information ideas, or anything else you would like so that we can keep providing you with outstanding products, services, and information to help your business succeed. Your success and satisfaction are our top priorities. Please contact us at [customer.loyalty@sage.com](mailto:customer.loyalty@sage.com) anytime we can help you receive the extraordinary service you deserve from either Sage or your Sage Business Partner.

