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Sage 500

Product Overview





Sage 500 ERP is a complete enterprise management solution to help you streamline operations, manage with insight, and grow your business. From supply chain and manufacturing management to financial and e-commerce capabilities, Sage 500 ERP enables progressive companies to increase user productivity and lower overall costs. Additionally, integration with a wide range of complementary solutions from Sage and certified partners can springboard your business to the next level.



Complete, Robust Financial Applications

Sage 500 ERP Financials

- General Ledger
- Accounts Payable
- Accounts Receivable
- Cash Management
- Purchase Order
- Multicurrency Management
- Sage AP Automation
- Sage Budgeting and Planning
- Sage Fixed Assets

Sage 500 ERP Financials offer deep functionality and superior usability for all your core accounting and enterprise requirements. Advanced reporting and analysis capabilities—including the ability to track key performance indicators, publish reports to the web, and drill into data—empower your managers to make proactive decisions with real-time insight. Sage 500 ERP Financials put you in control of finances so you can manage your company to capture more profits.

General Ledger

General Ledger provides quick access and easy manipulation of mission-critical data. You can process intercompany transactions, establish flexible accounting periods and an unlimited number of budgets, perform future posting, and more. With its financial report writer, you can

perform consolidations setup—and maintain a variety of sophisticated reports so decisions are always based on insight gained from in-depth analysis.

“I’m very pleased with Sage 500 ERP, especially its ease of use and flexibility. It gives me a great deal of control, and guides me when I need to drill down to a trial balance or transaction report—exactly what we need for planning and managing rapid growth.”

— Britt Hayes, controller, Childcare Network

Accounts Payable

Accounts Payable offers several options to save time and reduce administrative costs by automating vendor-related tasks and simplifying voucher entry. It also accommodates multiple vendor addresses, multiyear history retention, automatic payment selection, check printing, and more.

Accounts Receivable

Accounts Receivable improves your cash flow and enhances customer satisfaction with streamlined automation of your collections process. Gain complete control of your receivables and invoicing processes and leverage automatic calculations that avoid errors and eliminate duplicate data entry. Consolidate customer receivables, statements, reporting, and credit checking across national accounts.

Cash Management

Cash Management enables you to quickly and accurately reconcile all of your bank accounts, as well as perform bank transactions with pinpoint accuracy. This module integrates seamlessly with the other Sage 500 ERP financial modules for automatic cash transactions and secure record keeping that flows through your entire system.

Purchase Order

Even businesses that don't manage warehouses can benefit from the advanced tracking capabilities of the Purchase Order module. You can monitor the purchase of office equipment, consumables, and fixed assets—and catch undershipments from your vendors. Vendor performance metrics enable you to better negotiate reduced costs with vendors and build stronger vendor relationships.

Multicurrency Management

Multicurrency Management provides robust multicurrency and analysis capabilities so you can optimize your international opportunities. You can maintain an unlimited number of currencies and exchange rate schedules, update exchange rates daily, and post realized and unrealized gains or losses due to currency fluctuations.

Sage AP Automation

Automate your entire AP process, from purchase to payment. Automated data entry saves you time, enters invoices with guaranteed accuracy, and stores them securely in the cloud. By managing approval workflows and internal controls in Sage AP Automation, you ensure that your coded invoices automatically route to the correct approvers and that every user has access to only the specific modules needed. Since all invoices are stored in the cloud, approvals can be completed from any location.

Sage Budgeting and Planning

Take control of the budget process and bring strategic insight to business planning. This budgeting and planning solution enables you to make strategic, more informed business decisions using "bottom up" and "top down" budgeting and "what if" analysis. It makes the budgeting and planning process faster and easier, encourages collaboration across all lines of business, and ties budgeting activities to organizational performance.

Sage Fixed Assets

- Sage Fixed Assets—Depreciation accounts for your company's tangible assets (laptops, copiers, production machines, and other business equipment), automatically calculate depreciation and tax deductions, eliminating the need for off-line spreadsheets.
- Sage Fixed Assets—Inventory takes Sage Fixed Assets—Depreciation one step further with a sophisticated bar-code system that empowers you to easily track the physical location of assets using a convenient handheld radio frequency device.
- Sage Fixed Assets is integrated to the Sage 500 Purchase Order module which reduces double entry during the purchasing process, and also with the General Ledger which generates journal entries to book depreciation expense.



Efficient Distribution and Supply Chain Management

Sage 500 ERP Distribution

- Inventory Management
- Inventory Replenishment
- Purchase Order
- Sales Order
- Sales Tax by Avalara
- Payment Processing
- eBusiness Suite
- Advanced Kitting
- Product Configurator
- Warehouse Management
- Sage Inventory Advisor

Sage 500 ERP provides an advanced distribution and supply chain management solution that helps you minimize carrying costs while ensuring sufficient product availability. Automated supply chain and warehouse management processes integrate solidly with demand forecasting to maximize inventory control and profits. With features that support multiwarehouse configurations as well as multisite customers, Sage 500 ERP is optimized for a wide variety of distributors and manufacturers. Specially designed features include comprehensive inventory demand forecasting, a web-integrated product catalog, flexible sales and returns processing, and automated procurement.

The Sage 500 ERP distribution solution empowers you to strategically manage every aspect of the distribution cycle, from purchasing all the way through sales, with unparalleled efficiency and control.

Inventory Management

With its warehousecentric design, the Inventory Management module can save you time and money. You can track costs and sales histories by warehouse and manage assemble-to-order or build-to-order kits. You also retain complete inventory visibility by tracking your stock transfers

both within and between warehouses. Down time turns into up time since you'll be able to take orders during inventory cycle counting. You can even attach images to inventory items and organize your products into a comprehensive catalog, which translates to easy item lookup in both the Sales Order and Purchase Order modules. Inventory Management fully supports raw material and finished goods lot control and serial number tracking in addition to physical inventory counts.

“Sage 500 ERP does much more than the ERP I implemented at a previous company for nearly half a million dollars . . . We looked at 20 different systems, and none even came close to Sage 500 ERP.”

— Bob Schrader, operations manager,
Hartland Controls LLC

Inventory Replenishment

This sophisticated module gives you the insight to maximize your profits by finding the optimal balance between accelerating inventory turnaround and maintaining adequate stock levels to meet customer demand. Inventory Replenishment includes demand forecasting and automated procurement capabilities, which enable you to automatically generate purchase orders and warehouse transfers based on your inventory requirements. By tracking overhead costs and optimal purchase levels for vendors, you can combine orders so you receive maximum discounts from your vendors as you minimize your overhead costs. Inventory Replenishment utilizes seasonal cycles, sales history, and lead times to forecast the appropriate inventory levels and minimize carrying costs while maximizing efficiency throughout your supply chain.

Purchase Order

The Purchase Order module helps you manage the requisition, purchase, and physical receipt of items and services. You can tag incoming product against customer sales orders so that as product is received, it is immediately designated to customer back orders. In addition, manufacturers can accurately track material and outside process costs by tagging a purchase order line to a specific work order operation. You can also verify payable invoices by matching the delivery receipt with the invoice and the original purchase order. Tighter tracking and more accurate purchasing control within your warehouse means greater cost efficiency and ultimately a better bottom line.

Sales Order

Sales Order increases operational efficiency by accommodating multiple customer requests in one transaction. For example, each order or return line item can have its own ship-to address, salesperson, tax rate, ship date, ship-from location, and drop-ship designations. In addition, the flexibility of the Sales Order module enables you to price inventory items based on customer class, location, discounts, and more. Sales Order leverages a

user-friendly grid entry form that can be personalized for streamlined data entry. The Sales Order module includes a formalized Return Merchandise Authorization (RMA) process to manage customer and vendor returns. Adding the Sage 500 ERP Multicurrency module equips Sales Order to accommodate multiple currencies for easy entry into global markets and unsurpassed pricing flexibility. Real-time visibility enables you to confirm stock availability or, if out of stock, source from another warehouse, drop-ship, create work orders, or substitute other items.

Sales Tax by Avalara

Sage 500 ERP Sales Tax automatically performs address validation, sales tax jurisdiction research, and rate calculation to ensure sales tax compliance.

Payment Processing

Quickly and easily process payment receipts with the Credit Card Processing module. Credit card transactions can be initiated and managed through the Sales Order, Accounts Receivable, and Cash Management modules. Advanced security includes fraud prevention features that protect both you and your customers from unauthorized credit card usage as well as the acceptance of ACH or electronic check payments through the same secure merchant processing process. Plus, you have peace of mind knowing that the payment processing has been verified as being compliant with Payment Application Data Security Standard (PA-DSS) requirements established by the Payment Card Industry (PCI), including level-3 processing compliance.

eBusiness Suite

The eBusiness Suite for Sage 500 ERP provides an intuitive extension to Sage 500 ERP in the form of a browser-based solution. It empowers your customers, salespeople, and customer-service representatives to increase efficiency and productivity in order to boost sales. Originally designed as an enhanced replacement for eCustomer and eSalesforce, eBusiness Suite has evolved into a more-comprehensive solution. It can serve as a B2B and B2C interface, as well as a sales-team, CSR and remote-location alternative interface to

“With \$4 million in inventory, 300 different products, and four warehouses, we appreciate how robust and accurate Sage 500 ERP is. Our raw material and labor costs vary depending on location. Sage 500 ERP lets us monitor each item independently—something not many systems can do. Inventory replenishment at our distribution site is so much more efficient that we’ve reduced our workload by 80 percent.”

— Janet O’ Neal, director supply chain management, Kellogg Garden Products

Sage 500 ERP.

Advanced Kitting

The Inventory Management module provides the ability to stock and ship assembled kits as well as sell build-to-order kits based on material templates. The Advanced Kitting module takes this a step further by incorporating labor costs into the kitting process and creating routings within the components.

Product Configurator

Developed by industry experts, Product Configurator puts you in control of orders and bills of material by associating rules to build finished goods items. This is particularly helpful for complex products that have customer-selected options such as color, size, or style.

Warehouse Management

Manage inventory movement within your physical warehouse and between warehouses using built-in, three-step inventory transfers. Inventory can also be assigned to a dedicated or random bin and tracked by location for wave and zone picking methods. Warehouse Management provides real-time inventory visibility for companies with large inventories or multiple warehouse locations.

Sage Inventory Advisor

By combining inventory management and control capabilities, Sage Inventory Advisor applies data already in the system to reduce stock-outs, excess inventory, and costs associated with daily operations. Use this joint capability to analyze inventory data, improve the accuracy of inventory forecasts, and suggest optimal replenishment recommendations.





Manufacturing With Confidence

Sage 500 ERP Manufacturing

- Light Manufacturing
- Advanced Manufacturing
- Advanced Planning & Scheduling
- Engineering Change Management
- Estimating
- Material Requirements Planning (MRP)
- Product Configurator
- Shop Floor Control

When demand hits, it's crucial that manufacturing is ready and able to deliver. Sage 500 ERP was designed with the flexibility and expanded capabilities to easily accommodate the requirements of many different industries. It handles production from raw materials through finished goods, works seamlessly with the accounting and distribution modules, and helps you pinpoint the areas where you can save time and money—all while helping you provide exceptional customer service.

Light Manufacturing

This streamlined manufacturing system is perfect for distributors, assemble-to-order industries, and other light manufacturers that don't contend with complicated labor transactions or material issues. Light Manufacturing features an easy-to-use production entry screen where finished goods are reported after the fact. Material quantities, outside process transactions, and labor time are posted to finished goods in one simple step, saving you time by eliminating dozens of labor and material transactions. In addition, distributors can identify labor as part of the kitting process, which dramatically improves product costingsubsequent pricing, and kitting, and in the event of an error, a single entry can reverse the production entry if needed.

Advanced Manufacturing

Advanced Manufacturing is especially well-suited for discrete assembly, electronics, metal fabrication, machine/equipment manufacturing, and other production environments where work order tracking and labor reporting are essential. The system features shop floor visibility to your entire enterprise. GAAP-compliant job costing gives you insight regarding your most profitable and costly jobs. Operations, machines, work centers, and other options may be defined to accommodate your unique manufacturing requirements. Advanced Manufacturing also supports coproducts, byproducts, disassembly, and outside process tracking.

"Sage 500 ERP gives us much better traceability of materials. We have real-time inventory and know exactly what is on the shop floor. And because of improved routing and bill of materials, we have significantly reduced scrap caused by BOM errors."

— Mark Chollett, director of technology,
Wiseco Piston, Inc.



Advanced Planning & Scheduling

Utilizing industry-standard scheduling rules, this module schedules production based on advanced algorithms and mathematical calculations. System-generated schedules and a drag-and-drop schedule board put you in control of big-picture planning and help you better manage scheduling by easily accommodating last-minute priority jobs and unexpected machine downtime. You can manage multiple production schedules by facility, conduct what-if analysis of the manufacturing process, and manage machine and tool resources in real time. Enterprisewide online visibility of production schedules, order status, and completion dates keep customer service, management, and sales all in the know.

Engineering Change Management

A routing/bill of materials may be placed under engineering change management control to track any changes made to the production standards. Members of predefined user groups are notified by email when a change is made to a controlled routing/bill of materials.

Estimating

Internal product structure and cost estimates are quickly created from scratch or copied from an existing routing/bill of materials, estimates, or work orders. Final estimates may be converted directly into a quote, sales order, or production routing/bill of material. Engineers can estimate multiple quantities with different markups to amortize setup and one-time costs across multiple quantities. Estimates may include labor, materials, subcontracted operations, prototyping, special tooling, and other costs.

Material Requirements Planning (MRP)

MRP is integrated with finite scheduling to provide a true closed loop system, which utilizes actual demand and transaction data from sales orders, purchase orders,

inventory management, project accounting estimates, and work orders. It also provides integration with demand forecasts for items based on advanced replenishment rules and formulas, thus enabling more accurate material plans by item. Planners have total control over generation criteria including start and stop dates, planning bucket sizes, and a demand time fence. Multiple MRP versions provide greater flexibility and simulation/comparison capabilities. MRP may be instantly accessed for material data from sales orders, purchase orders, work orders, and inventory.

Product Configurator

The Product Configurator module controls sales orders and bills of materials by associating rules to build finished goods items. This useful tool helps you determine which components to use, how much configured parts cost, and how much to charge the customer. You can also automatically build new part numbers and bills of materials, including all manufacturing requirements and instructions to make the configured part. The intuitive interface of Product Configurator facilitates quick sales order entry and customer service inquiry.

Shop Floor Control

Designed for use with bar-code and touchscreen technology, the shop floor control system can run on a terminal or from many handheld or terminal devices. Shop Floor Control features start-and-stop job entry, work order inquiry, material/outside/other issues entry, receipt of goods entry, labor assignments, and access to other essential shop floor activities.



Accurate Project Management

Sage 500 ERP Time and Project Management

- Project Accounting

Achieve the operational edge with these powerful functions that put you in control of managing projects with exceptional flexibility, preventing cost overruns, and maximizing bottom-line savings.

Project Accounting

With Project Accounting, track actual vs. estimated costs through forecast completion. Adjust estimated budget to increase forecast accuracy at any point through the project lifecycle. Also, designate the most appropriate project type—time and materials, fixed price, or a combination of the two, and eliminate the extra costs of maintaining multiple tracking systems. Capitalize on six GAAP-compliant profit recognition methods—and maximize project profitability with the insight you gain from these sophisticated time and expense tracking tools. You can proactively prevent cost overruns, increase cash flow, and generate greater bottom line savings.

“Sage 500 ERP and MRP let us get our act together. We finally have inventory numbers we can depend on, far more on-time shipments, and better quality throughout the company.”

— David Palmerston, VP of technology,
Helical Products Company, Inc.



Leveraging Business Intelligence

Sage 500 ERP Business Intelligence

- Business Insights Dashboard
- Business Insights Analyzer
- Business Insights Explorer
- SAP® Crystal Reports for Sage 500 ERP
- Sage 500 ERP Alerts
- Sage 500 ERP Office
- Sage 500 Intelligence Reporting
- Sage Enterprise Intelligence

Successful enterprises are those that are smart enough to leverage their business intelligence to lock in their competitive edge. Business intelligence and reporting helps your managers hone in on key performance indicators and actively monitor both internal and external changes as they occur. These tools not only help provide the insight behind the numbers, they help you move from reactive mode into proactive mode. It's what you need to work smarter, not harder.

Business Insights Dashboard

Get the vital information you need to stay in charge of your business all in one place with the new Business Insights dashboard. Using .NET technology, the Dashboard puts an end to information overload by putting up-to-date sales statistics, key accounting data, industry news, and competitive intelligence at your fingertips and all in one place. With this convenient, powerful solution, you get an unsurpassed level of knowledge management that consolidates critical personal, corporate, and external information and enables single-click access to analytical and collaborative tools. Business Insights Dashboard can easily be personalized to display information according to each user's preference.

Business Insights Analyzer

Business Insights Analyzer users have the ability to organize, graph, and format summarized information within the Sage 500 ERP system. Contextual mappings have been configured that allow a user to jump directly to data views for advanced analysis and reporting on virtually any data in the Sage 500 ERP database.

Business Insights Explorer

Business Insights Explorer brings a new paradigm to navigation. Sage 500 ERP is bundled with a series of predefined Preview relationships including customers, vendors, items, warehouses, projects, work orders, and more. In addition, the Explore option allows users to drill to original records. For example, users can drill into customer invoices, shipments, and work orders anywhere the customer ID is displayed within the system. Views can be filtered and sorted or exported to Excel.

SAP Crystal Reports for Sage 500 ERP

This powerful report writer helps you create, format, and print presentation-quality reports that reveal the business insights behind the numbers.

Sage 500 ERP Alerts

This innovative module utilizes standard and customized early warning email messages to notify you of critical events in your Sage 500 ERP system including credit holds, inventory thresholds, and priority client transactions. You can configure your email system to forward alerts to your mobile device so you can be instantly alerted to important business issues—no matter where you are. Enterprise Alerts puts your enterprise ahead of the game by keeping your managers in the know and giving them a proactive edge.

Sage 500 ERP Office

Take your enterprise communications and customer service to the next level with the single-click efficiency of automatic generation of custom letters, emails, and spreadsheets.

Sage 500 Intelligence Reporting

Sage 500 ERP Intelligence Reporting is a Microsoft® Excel®-based business intelligence (BI) reporting tool that makes financial and operational reporting a breeze. Intelligence Reporting extracts your data from Sage 500 ERP and delivers it in Excel so that you can enjoy the flexibility of designing any type of business report you need in a few mouse clicks. In addition, accessing new report templates with Sage 500 Intelligence Reporting is simple - just click on a desktop link to download templates that support a wide variety of business reporting needs. Sage 500 Intelligence Reporting speeds up the reporting process to give you more time to analyze reports, enabling you to make smart business decisions that will give your company a competitive edge.

Sage Enterprise Intelligence

Sage Enterprise Intelligence gives business users, managers, and executives the power to analyze and create business reports, dashboards, or views on their own and specific to their jobs—with no special expertise required. It offers intuitive viewing through a web interface, mobile devices, or through an Excel-based interface.



“The main thing I like about Sage 500 ERP is the ability to go into the database, grab information, and then manipulate it however we want. Because the system is based on an SQL engine, we can store vast amounts of data and generate any type of report imaginable.”

— John Kalinich, COO, Teva Sport Sandals



Customizing and Evolving With You

Implementation, Customization, and Integration

- Assisted Company Setup
- Data Import Manager
- Data Migrator
- Import Utilities
- Customizer
- Software Development Kit
- Source Code

Designed for maximum flexibility in customization and integration, Sage 500 ERP is a progressive software solution that adapts to meet your unique and changing enterprise requirements. The Customization suite ensures that you can get the most from your system with easily modified screens and forms—without having to modify your source code. You have the luxury of controlling application customizations to all users or any combination of specific user groups. Reports can easily be customized, and data from external applications can be imported into Sage 500 ERP.

In addition, world-class customization tools provide a foundation for Visual Studio .NET business application development and include software controls, tools, wizards, and utilities. Our goal for Sage 500 ERP is simple—to provide an affordable, sophisticated, end-to-end business management system that is easy to implement, to use, and to customize. The intuitive Assisted Company Setup, Data Import Manager, Data Migrator, and Import Utilities get you up and running quickly, while the powerful Customizer, Software Development Kit, and Source Code products allow you to customize Sage 500 ERP to meet your ever-changing business and industry needs.

Assisted Company Setup (ACS)

ACS is a process for implementing Sage 500 ERP that includes project management tools, tips for successful implementation, and data migration utilities. ACS helps

you manage the implementation timeline by integrating with Outlook so you can assign implementation tasks to employees or consultants. It also walks through the steps required to successfully implement Sage 500 ERP so there will be fewer questions and surprises when you go live.

Data Import Manager

Built with the latest .NET and SQL Server technology, the Data Import Manager allows database administrators to configure one-time or regularly scheduled imports into a wide variety of Sage 500 ERP transaction formats using a powerful mapping wizard. The mapping wizard provides the detailed knowledge of Sage 500 ERP, including required fields, default validations, and lookups—while enabling the administrator to transform direct feeds from ASCII, delimited, Microsoft Access, Excel, SQL Server, and XML data sources. Developers also can modify the final import package by adding scripting for additional validations and other complex transformations.

Data Migrator

Data migration is built into the Assisted Company Setup and available for postimplementation data imports. The Data Migrator can be used to move data from many different databases and file types into staging tables where the data can be modified and validated before being imported into Sage 500 ERP.

Import Utilities

A series of utilities is available throughout Sage 500 ERP for importing smaller sets of data. Import utilities are very useful for importing new item lists from vendors or sales orders from e-commerce storefronts. Utilities are available for importing general ledger, accounts payable, accounts receivable, and sales order transactions. In addition, you can import subsidiary company data for consolidations, import items or inventory transactions, and export general ledger consolidation data for use in external applications.

Customizer

With Customizer, you can quickly modify screens and forms to match your specific business processes, improve staff productivity, and achieve the desired look and feel. It also allows you to simply add industry-specific features without ever requiring extensive programming knowledge or changes to the source code.

Software Development Kit

The Software Development Kit (SDK) gives you the tools you need to complete your development tasks expediently and inexpensively. It provides Visual Basic controls, wizards, and utilities to solve housekeeping issues, including concurrency, user interface, security models, data handling, and more. With housekeeping issues handled by the SDK, your developers are free to build add-on programs or interface controls to Sage 500 ERP, saving you development time and money.

Source Code

Source Code for each module is available, which provides advanced capabilities for code development and implementation.

