

From the Desk of:

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Accpac Pro ERP 200 : Tip #1

Routing/Approvals

Routing/Approvals enhances the Sales Order, Purchase Order and RMA cycle in Pro ERP 200 v.7.4. Unlike the familiar Privilege function that merely allows users access to certain fields and screen, Routing dynamically allows a business to determine who in the organization needs to perform functions, processes the workflow and notifies users of their current state.

How the feature works:

In SM, approval codes are set-up (similar to Rules) under Maintain/Routing Approval. Processes sequences are simply functions assigned in progressive steps, using Pro's tree-like windows view. User ID's are matched with the process sequence and the approval code. As steps are required or are completed (routed), Pro can send notifications emails if Message Master is present or using the free Message Center on the main toolbar. Use the icon on the main tool to view the pending activities.

How the feature is used:

For example, a Sales Order is routed for approvals for entry under a stated credit limit. Thus, a Sales Order whose value is greater than the user's approval code will allow, is routed to another user for approval. A notification is sent that an additional task is required.

The Opportunity:

Staff complaints and errors around the processing of SO, PO and RMA's should trigger interest in implementing the SAGE Pro ERP v 7.4's Routing/Approvals function. It eliminates workflow snags and oversights as well as assures meeting the Company's business goals.

If you would like to talk about how to improve your lengthy Ordering/Buying/Returning cycles, please call me at 646-293-1744 or contact me via email: lslepian@netatwork.com.

