



## BOM Options Display For Sage 100 2017

457 Palm Drive  
Glendale, CA 91202  
818-956-3744  
818-956-3746  
[sales@iigservices.com](mailto:sales@iigservices.com)

[www.iigservices.com](http://www.iigservices.com)



Information in this document is subject to change without notice. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose without the express written consent of Information Integration Group, Inc.

## **TRADEMARKS**

*MS-DOS* and *Windows* are trademarks of Microsoft Corporation.

SAGE 100 (formerly Sage ERP MAS 90 and 200) is registered trademark of Sage Software, Inc.

All other product names and brand names are service marks, and/or trademarks or registered trademarks of their respective companies.

Table of Contents

*Installation Instructions and Cautions* .....3  
    **Wait! Before You Install – Do You Use CUSTOM OFFICE?** .....3  
    **Registering IIG products**.....4  
    **ODBC Security** .....5  
    **Role Maintenance** .....5  
*Introduction* ..... 6  
*Bill of Materials Maintenance* ..... 7  
*Sales Order Entry* ..... 8  
    **Editing Bill Options in the Sales Order** ..... 12

## Installation Instructions and Cautions

**PLEASE NOTE: SAGE 100** must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 installation and setup now; then allow any updating to be accomplished automatically. Once SAGE 100 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

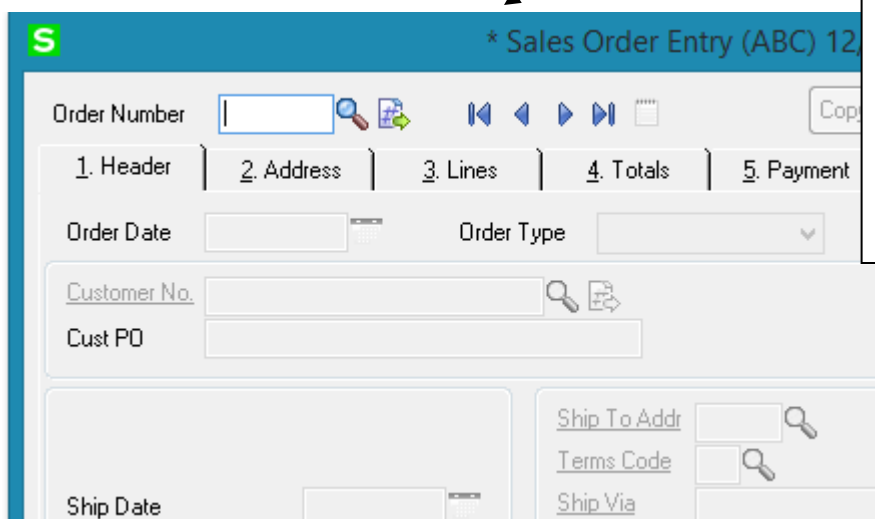
### Wait! Before You Install – Do You Use CUSTOM OFFICE?

**THIS IS AN IMPORTANT CAUTION:** If you have Custom Office installed, **and** if you have modified any SAGE 100 screens, you must run **Customizer Update** after you do an enhancement installation.

**But wait! BEFORE** you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



## Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the SAGE 100.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

The screenshot shows the 'IIG Master Developer Enhancement Registration' window. The 'Registered Customer' field is 'IIG - Glendale'. The 'Registration Information' section includes:

- Reseller Name: (empty)
- Serial Number: 1111111
- Customer Number: 222222222
- User Key: 33333333333333333333
- Product Key: 55555 55555 55555 55555 55555

Below the registration information is a table with the following data:

| Enhancement     | Level | Release Date | Serial Number      | Unlocking Key |
|-----------------|-------|--------------|--------------------|---------------|
| IIG Enhancement | 5.40  |              | AAAAAAAAAAAAAAAAAA | BBBBB         |

The 'IIG Enhancement' row is highlighted. At the bottom of the window, there are buttons for 'Print Registration Form', 'Close', and 'Undo'. The status bar at the bottom right shows 'IIG ABC 12/16/2016'.

Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

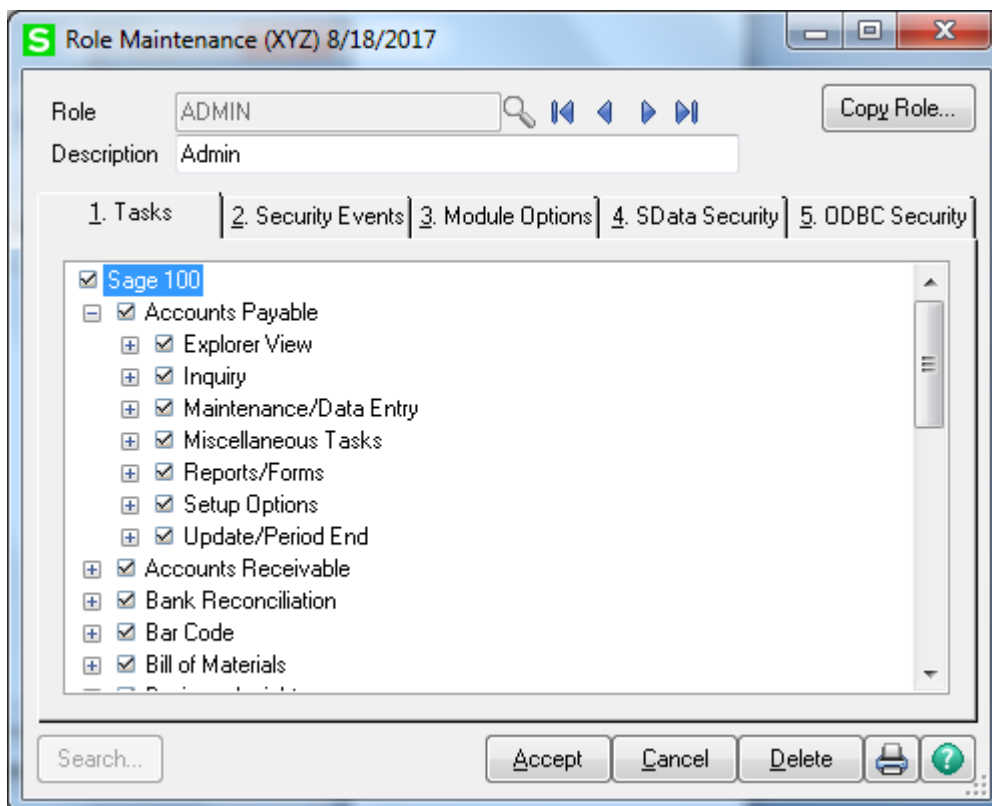
## ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.



## Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.



## Introduction

The **BOM Options Display** enhancement enables user to view and edit Bill Options directly when entering a sales order.

Before starting to use the enhancement, please make sure that the **Use Option Bills** box is checked in the **Bill of Materials Options** under the **Bill of Materials Setup** menu.

The screenshot shows a software window titled "Bill of Materials Options (XYZ) 8/18/2017". The window has a tabbed interface with three tabs: "1. Main", "2. Entry", and "3. Printing". The "1. Main" tab is active. The window is divided into several sections:

- Require Bill Revisions**:
- Use Option Bills**:  (highlighted with a blue border)
- Enable Engineering Change Control**:
- Post to General Ledger**:
- Production Entry Register in Detail**:
- History**:
- Retain Production History**:
- Segment Substitution**:
- Post Miscellaneous Charges by Warehouse**:
- G/L Segment Selected for Inventory**: None

On the right side, there are two main sections:

- Bill of Materials Maintenance**:
  - Allow Kit Bills**:
  - Allow Phantom Bills**:
  - Allow Duplicate Components**:
  - Allow Entry of Negative Quantities**:
  - Allow Scrap and Yield Percentage Factors**:
  - Maximum Number of Levels**: 10
  - Sync Bill Description and Item Description**: Prompt
- Integrate with**:
- General Ledger**:

At the bottom right, there are buttons for "Accept", "Cancel", a printer icon, and a help icon.

## Bill of Materials Maintenance

Select the **Bill of Materials Maintenance** program from the **Bill of Materials Main** menu.

The screenshot shows the 'Bill of Materials Maintenance (XYZ) 8/18/2017' window. The 'Header' tab is selected. The 'Bill Number' field contains 'DSKTP-00200'. The 'Revision' field contains '000'. The 'Description 1' field contains 'TURBO DESKTOP COMPUTER SYSTEM'. The 'Bill Type' is set to 'Standard'. The 'Option Categories' list is as follows:

| Option Category                 | Required                                     |
|---------------------------------|--|
| 1 MAIN DISK DRIVE ASSEMBLY      | <input checked="" type="checkbox"/> Required |
| 2 AUXILIARY DISK DRIVE ASSEMBLY | <input type="checkbox"/> Required            |
| 3 SECOND AUXILIARY DISK DRIVE   | <input type="checkbox"/> Required            |
| 4 HIGH SPEED CPU                | <input type="checkbox"/> Required            |
| 5 MEMORY PACKAGE                | <input type="checkbox"/> Required            |
| 6 COLOR DISPLAY PACKAGE         | <input type="checkbox"/> Required            |
| 7                               | <input type="checkbox"/> Required            |
| 8                               | <input type="checkbox"/> Required            |
| 9                               | <input type="checkbox"/> Required            |

The 'Print Option Codes on S/O' checkbox is checked and highlighted with a blue box.

Enter a **Bill Number** or use the **Lookup** button to select a Kit.

Make sure the **Bill Has Options** box is checked.

Check the **Print Option Codes on S/O** box to load the Bill Options as comment lines while entering the Bill Item in the Sales Order lines.



## Sales Order Entry

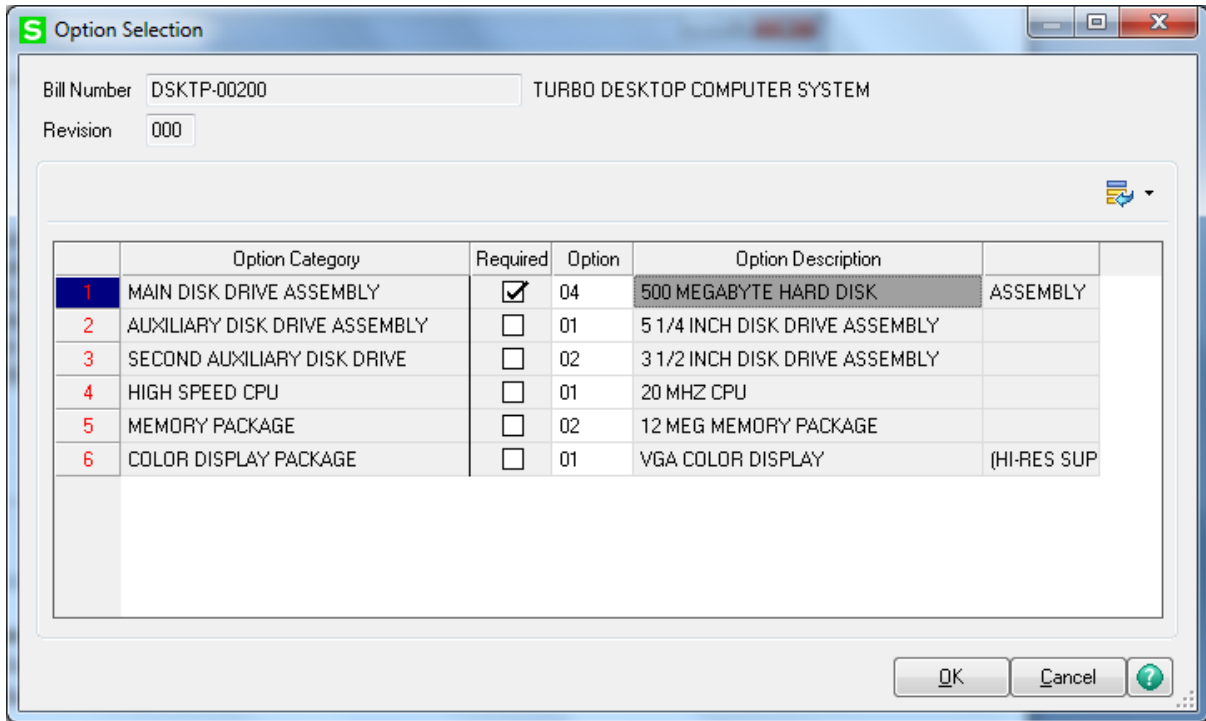
In the **Lines** tab of the **Sales Order Entry** program from the **Sales Order Main** menu, select a Bill Item from a Bill of Materials List.

The screenshot displays the 'Sales Order Entry (XYZ) 8/18/2017' window. The 'Lines' tab is active, showing a table with the following data:

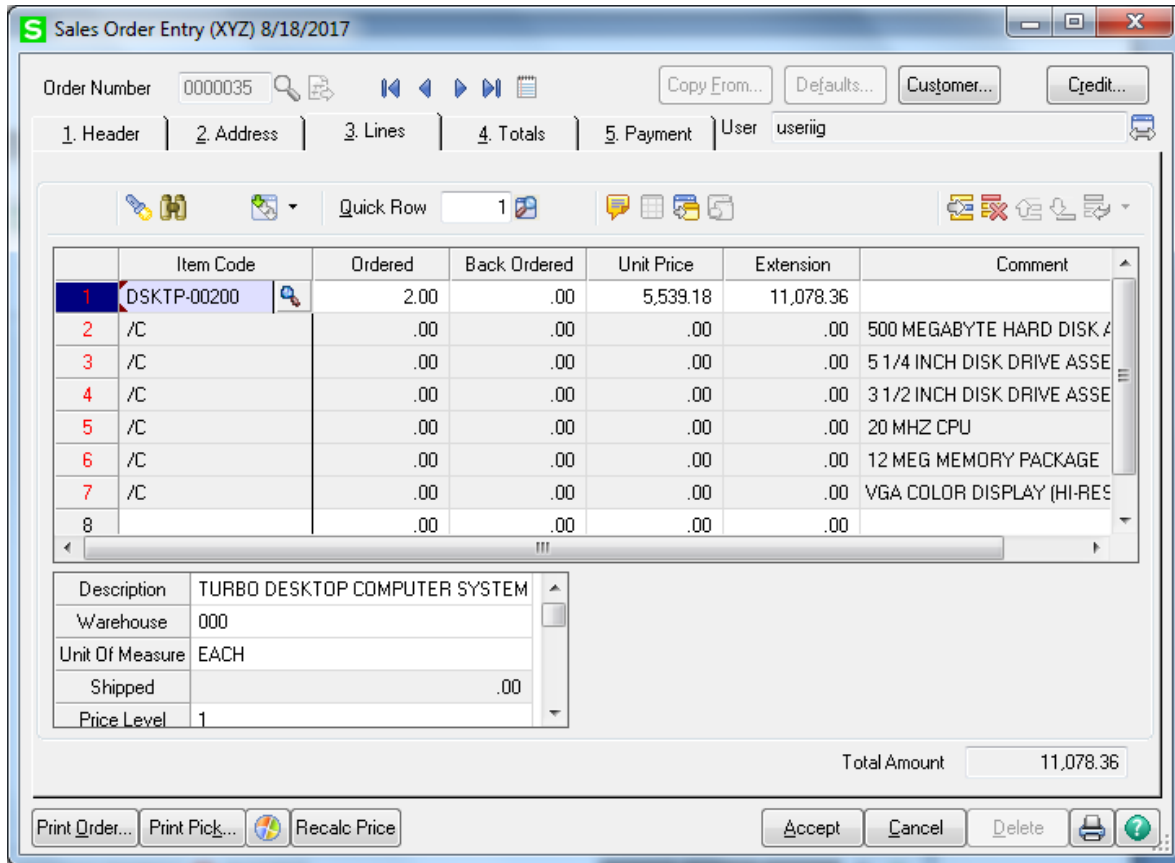
|   | Item Code   | Ordered | Back Ordered | Unit Price | Extension | Comment |
|---|-------------|---------|--------------|------------|-----------|---------|
| 1 | DSKTP-00200 | 2.00    | .00          | 3,176.18   | 6,352.36  |         |
| 2 |             | .00     | .00          | .00        | .00       |         |

Below the table, the description 'TURBO DESKTOP COMPUTER SYSTEM' is visible, along with other details: Warehouse 000, Unit Of Measure EACH, Shipped .00, and Price Level 1. The 'Available Quantity in this Warehouse is 63 EACH' and 'Total Amount 6,352.36' are also displayed. The window includes various navigation and action buttons such as 'Print Order...', 'Print Pick...', 'Recalc Price', 'Accept', 'Cancel', and 'Delete'.

Enter the necessary information (Quantity Ordered, Warehouse and other) and Tab/Enter. The **Options Selection** screen is opened.



Select **Options** using corresponding **Lookup** buttons.  
 Click **OK** to load the selected **Bill Number** along with its options into the order lines.



Options are loaded as comment lines, which cannot be edited and only descriptions of options are visible. When the order with such lines is invoiced, the lines are converted into standard Comments that can be edited.

S/O Invoice Data Entry (XYZ) 8/18/2017

Invoice No. 0000030

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment

|   | Item Code   | Ordered | Shipped | Unit Price | Extension | Comment                    |
|---|-------------|---------|---------|------------|-----------|----------------------------|
| 1 | DSKTP-00200 | 2.00    | 2.00    | 5,539.18   | 11,078.36 |                            |
| 2 | /C          | .00     | .00     | .00        | .00       | 500 MEGABYTE HARD DISK /   |
| 3 | /C          | .00     | .00     | .00        | .00       | 5 1/4 INCH DISK DRIVE ASSE |
| 4 | /C          | .00     | .00     | .00        | .00       | 3 1/2 INCH DISK DRIVE ASSE |
| 5 | /C          | .00     | .00     | .00        | .00       | 20 MHZ CPU                 |
| 6 | /C          | .00     | .00     | .00        | .00       | 12 MEG MEMORY PACKAGE      |
| 7 | /C          | .00     | .00     | .00        | .00       | VGA COLOR DISPLAY (HI-RES  |
| 8 |             | .00     | .00     | .00        | .00       |                            |

|                 |                               |
|-----------------|-------------------------------|
| Description     | TURBO DESKTOP COMPUTER SYSTEM |
| Warehouse       | 000                           |
| Unit Of Measure | EACH                          |
| Back Ordered    | .00                           |
| Price Level     | 1                             |

Total Amount 11,078.36

Quick Print | Accept | Cancel | Delete

Editing Bill Options in the Sales Order

Select the Bill Item in the Sales Order.

Sales Order Entry (XYZ) 8/18/2017

Order Number 0000042

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment | User userig

Quick Row 1

|   | Item Code   | Ordered | Back Ordered | Unit Price | Extension | Comment                    |
|---|-------------|---------|--------------|------------|-----------|----------------------------|
| 1 | DSKTP-00200 | 2.00    | .00          | 5,539.18   | 11,078.36 |                            |
| 2 | /C          | .00     | .00          | .00        | .00       | 500 MEGABYTE HARD DISK A   |
| 3 | /C          | .00     | .00          | .00        | .00       | 5 1/4 INCH DISK DRIVE ASSE |
| 4 | /C          | .00     | .00          | .00        | .00       | 3 1/2 INCH DISK DRIVE ASSE |
| 5 | /C          | .00     | .00          | .00        | .00       | 20 MHZ CPU                 |
| 6 | /C          | .00     | .00          | .00        | .00       | 12 MEG MEMORY PACKAGE      |
| 7 | /C          | .00     | .00          | .00        | .00       | VGA COLOR DISPLAY (HI-RES  |
| 8 |             | .00     | .00          | .00        | .00       |                            |

Description TURBO DESKTOP COMPUTER SYSTEM

Warehouse 000

Unit Of Measure EACH

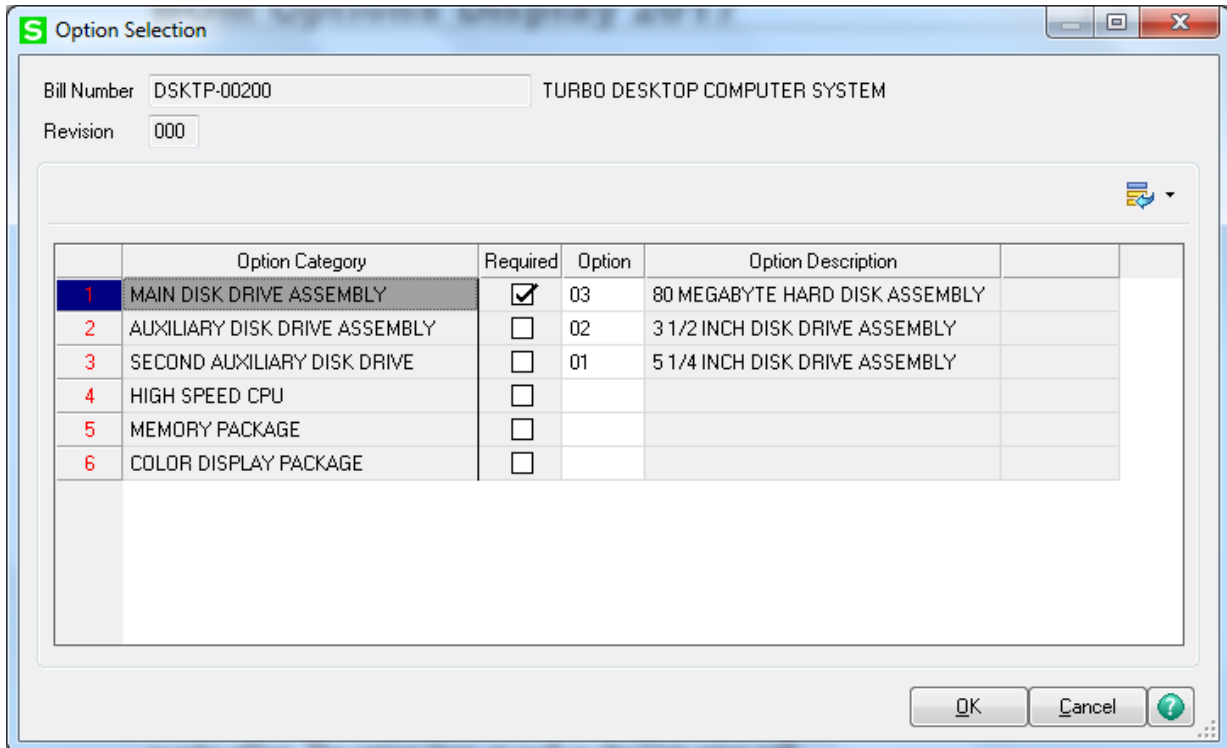
Shipped .00

Price Level 1

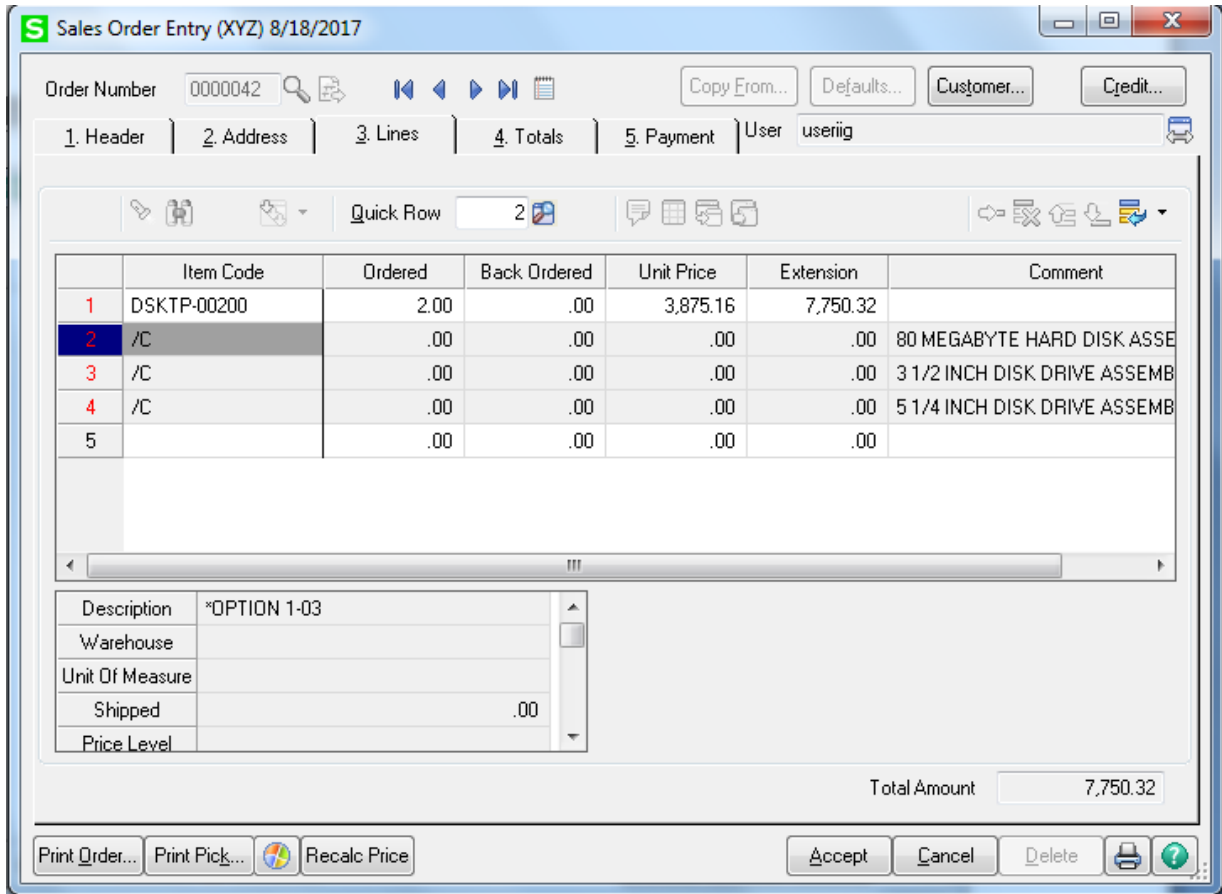
Total Amount 11,078.36

Print Order... Print Pick... Recalc Price Accept Cancel Delete

Click the **Edit Bill Options** button to open the **Options Selection** screen and edit the options. Here you can change your selections made previously.



After clicking **OK** you are returned to **Sales Order Entry**. Here you have to change the focus in the grid for changes to take effect. The option lines as well as the Unit price will be changed respectively.



If you delete Options for the Categories checked as **Required**, a message like the following one will display the numbers of these categories:

