



# Order Process Tracking For Sage 100 2018

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## **Table of Contents**

<i>Installation Instructions and Cautions</i> .....	3
<b>Wait! Before You Install – Do You Use CUSTOM OFFICE?</b> .....	3
<b>Registering IIG products</b> .....	4
<b>ODBC Security</b> .....	5
<b>Role Maintenance</b> .....	5
<i>Introduction</i> .....	6
<b>Sales Order Entry</b> .....	6
<b>Sales Order and Quote History Inquiry</b> .....	8
<b>Invoice History Inquiry</b> .....	11
<b>Order/Quote History Version Inquiry</b> .....	14
<b>IIG Order Process Tracking Report</b> .....	18
<i>Visual Integrator</i> .....	20
<i>ODBC Dictionary</i> .....	20

## 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.*

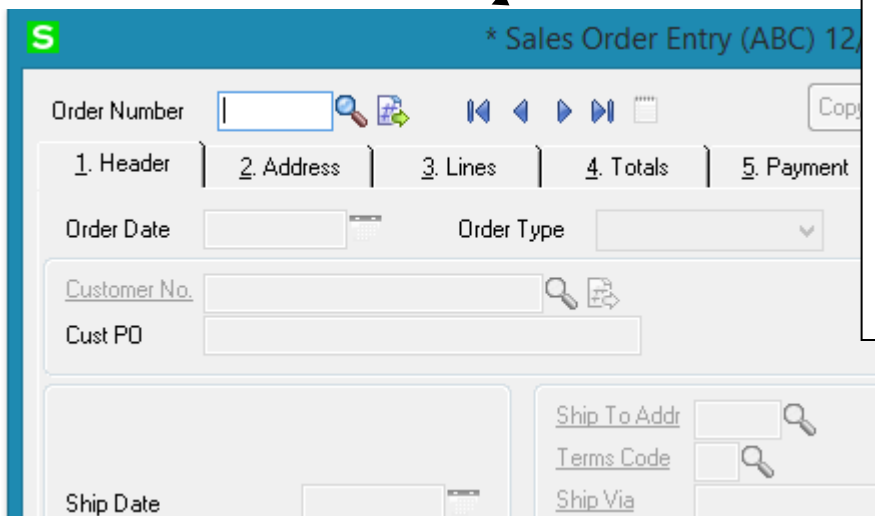
### Wait! Before You Install – Do You Use CUSTOM OFFICE?

***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**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement	6.00		AAAAAAAAAAAAAAAAAA	BBBBB

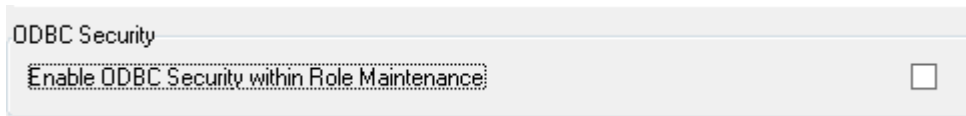
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

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.

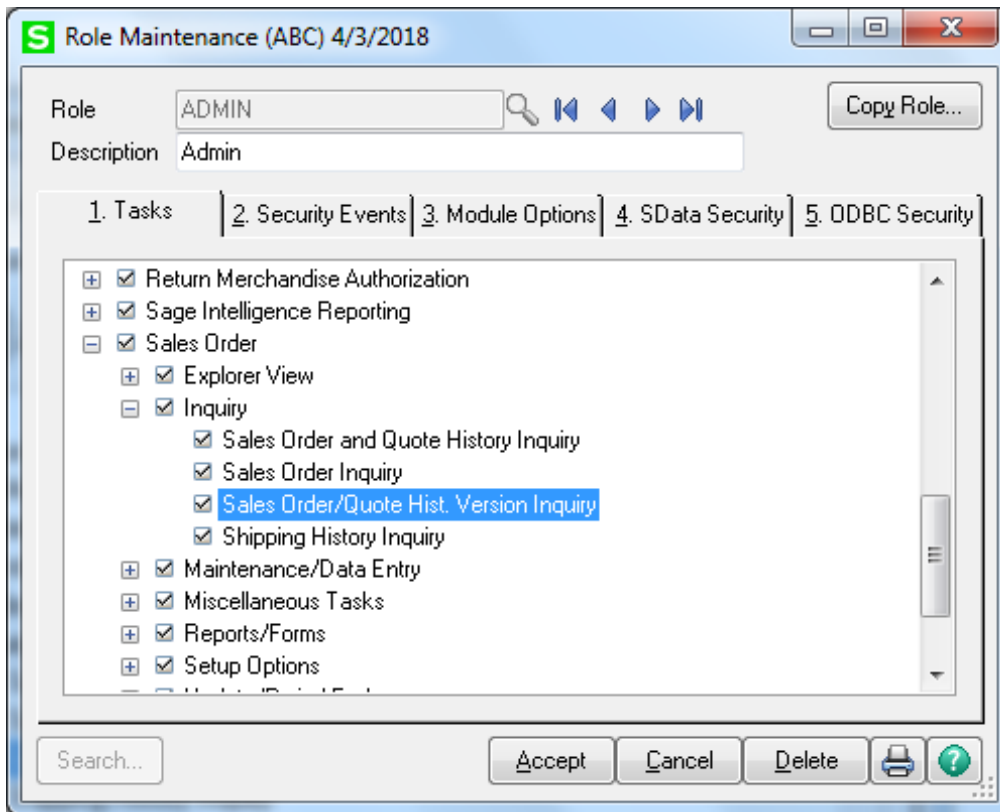
## ODBC Security

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

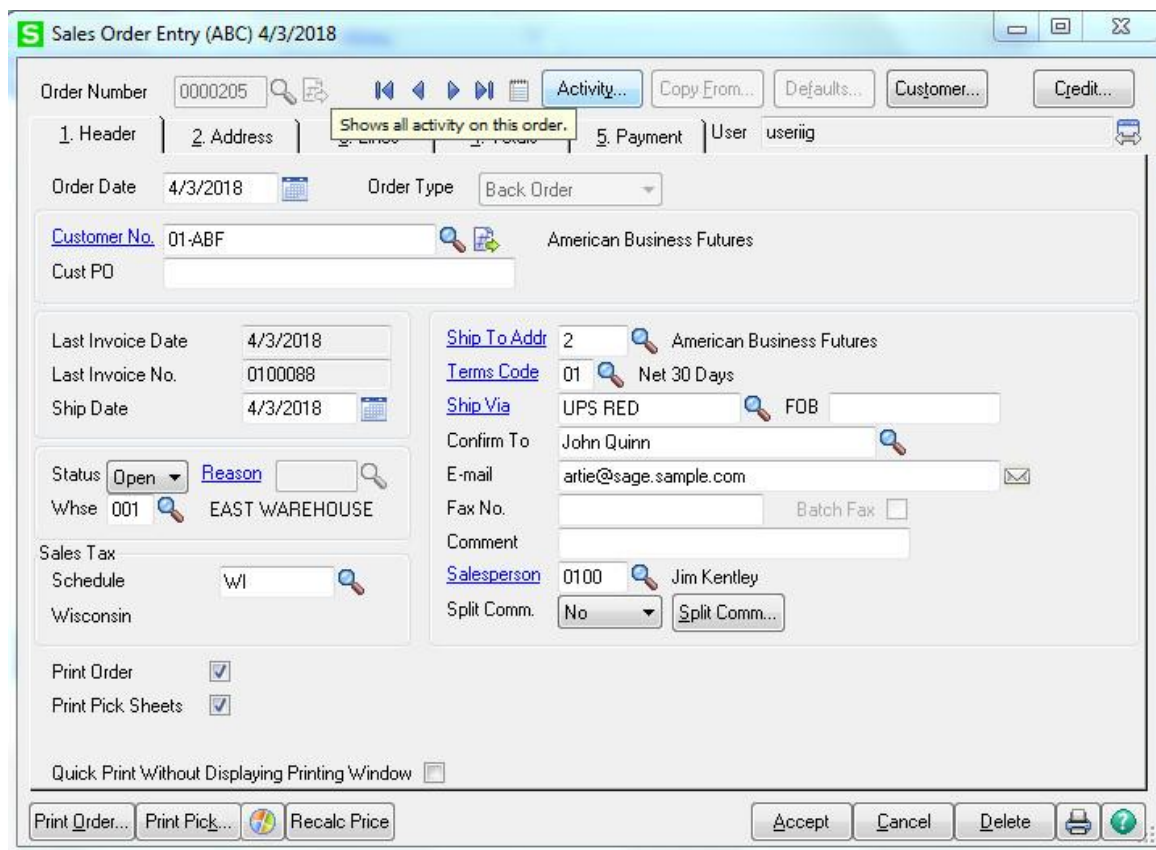
The IIG **Order Process Tracking** enhancement enables tracking all the activity on Sales Order: entry, changes, invoicing as well as printing a report of this tracking.

The Order Activity Tracking information can be accessed from Sales Order Inquiry and Sales Order/Quote History Inquiry.

The Order Process Tracking Report is intended for printing the order process activity log.

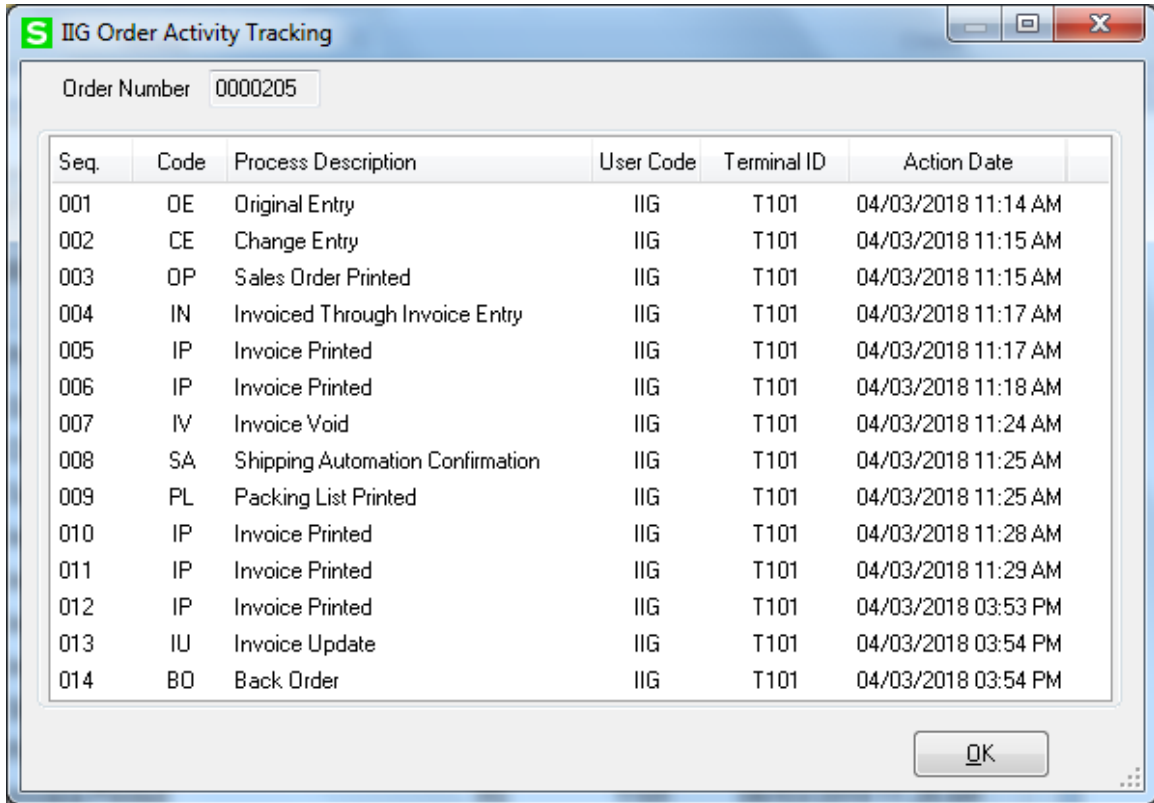
## Sales Order Entry

The **Activity** button has been added on the **Sales Order Entry** screen.



Click the **Activity** button to open the **IIG Order Activity Tracking** screen.

All the activity with the selected order and corresponding invoice, shipping entry is logged.



The screenshot shows a software window titled "IIG Order Activity Tracking". At the top left, there is a green square icon with a white letter 'S'. Below the title bar, there is a text input field for "Order Number" containing the value "0000205". The main area of the window contains a table with the following columns: "Seq.", "Code", "Process Description", "User Code", "Terminal ID", and "Action Date". The table lists 14 rows of activity. At the bottom right of the window, there is an "OK" button.

Seq.	Code	Process Description	User Code	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	04/03/2018 11:14 AM
002	CE	Change Entry	IIG	T101	04/03/2018 11:15 AM
003	OP	Sales Order Printed	IIG	T101	04/03/2018 11:15 AM
004	IN	Invoiced Through Invoice Entry	IIG	T101	04/03/2018 11:17 AM
005	IP	Invoice Printed	IIG	T101	04/03/2018 11:17 AM
006	IP	Invoice Printed	IIG	T101	04/03/2018 11:18 AM
007	IV	Invoice Void	IIG	T101	04/03/2018 11:24 AM
008	SA	Shipping Automation Confirmation	IIG	T101	04/03/2018 11:25 AM
009	PL	Packing List Printed	IIG	T101	04/03/2018 11:25 AM
010	IP	Invoice Printed	IIG	T101	04/03/2018 11:28 AM
011	IP	Invoice Printed	IIG	T101	04/03/2018 11:29 AM
012	IP	Invoice Printed	IIG	T101	04/03/2018 03:53 PM
013	IU	Invoice Update	IIG	T101	04/03/2018 03:54 PM
014	BO	Back Order	IIG	T101	04/03/2018 03:54 PM



## Sales Order and Quote History Inquiry

The **Activity** button has been added to the **Sales Order and Quote History Inquiry** screen to allow viewing all the activity on the selected order: change, printing, invoicing, etc.

Sales Order and Quote History Inquiry (ABC) 4/3/2018

Order Number: 0000202

Activity... Invoices... Credit...

1. Header | 2. Address | 3. Lines | 4. Totals | User: useriig

Order Date: 4/3/2018 RMA No.: 0000022 Master/Repeating No.:

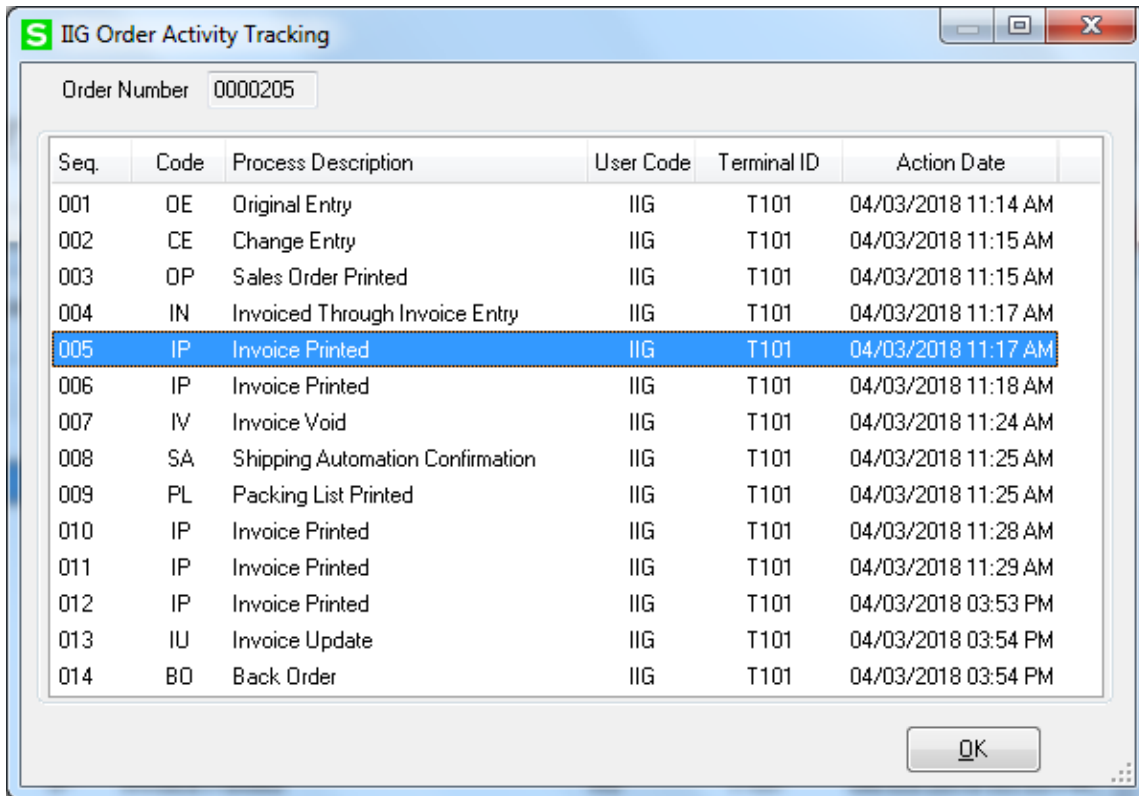
Customer No.: 01-ABF American Business Futures  
Customer PO:

Status: Active Order  
Cancelled Code:  
Last Invoice Date:  
Last Invoice No.:

Ship To Addr: 2 American Business Futures  
Terms Code: 01 Net 30 Days  
Ship Via: UPS RED FOB  
Warehouse: 001 EAST WAREHOUSE  
Confirm To: JOHN QUINN  
E-mail: artie@sage.sample.com  
Comment: Call Ed for credit approval.  
Salesperson: 0100 Jim Kentley  
Split Comm.: NO

Sales Tax Schedule: WI Wisconsin

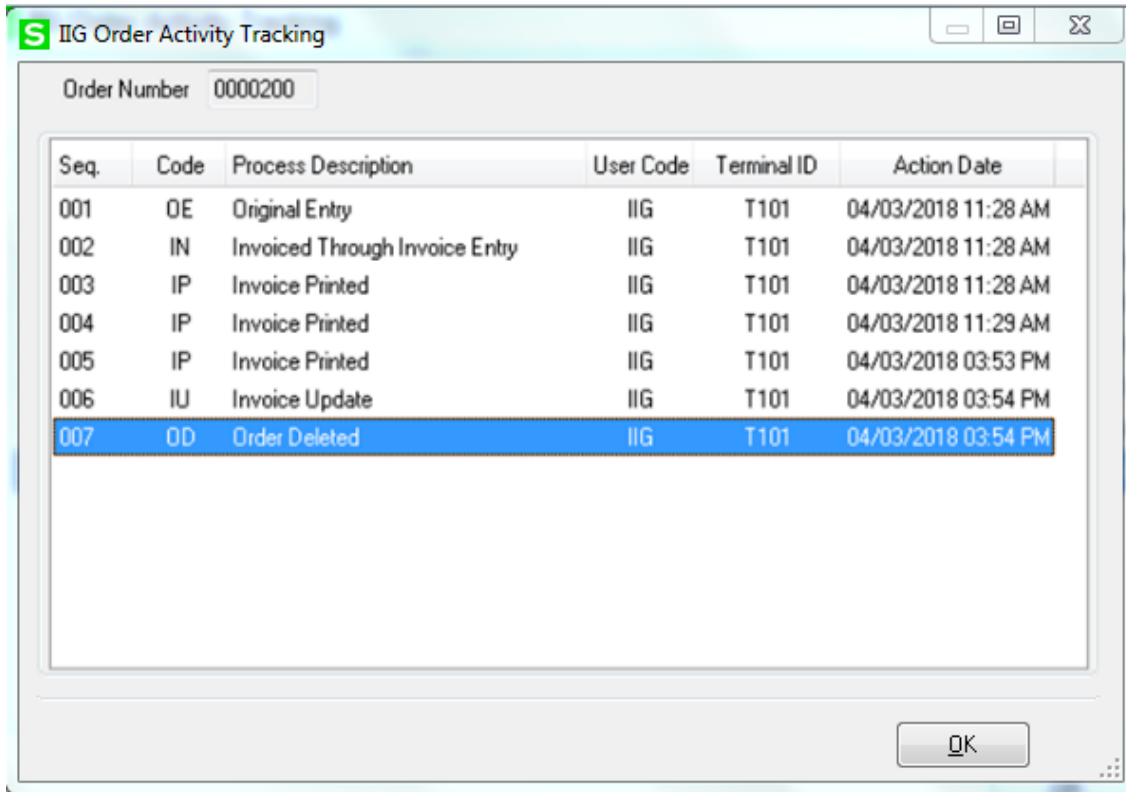
OK ?



The screenshot shows a window titled "IIG Order Activity Tracking" with a search field for "Order Number" containing "0000205". Below the search field is a table with the following columns: Seq., Code, Process Description, User Code, Terminal ID, and Action Date. The table contains 14 rows of activity data, with the row for Seq. 005 (Invoice Printed) highlighted in blue. An "OK" button is located at the bottom right of the window.

Seq.	Code	Process Description	User Code	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	04/03/2018 11:14 AM
002	CE	Change Entry	IIG	T101	04/03/2018 11:15 AM
003	OP	Sales Order Printed	IIG	T101	04/03/2018 11:15 AM
004	IN	Invoiced Through Invoice Entry	IIG	T101	04/03/2018 11:17 AM
005	IP	Invoice Printed	IIG	T101	04/03/2018 11:17 AM
006	IP	Invoice Printed	IIG	T101	04/03/2018 11:18 AM
007	IV	Invoice Void	IIG	T101	04/03/2018 11:24 AM
008	SA	Shipping Automation Confirmation	IIG	T101	04/03/2018 11:25 AM
009	PL	Packing List Printed	IIG	T101	04/03/2018 11:25 AM
010	IP	Invoice Printed	IIG	T101	04/03/2018 11:28 AM
011	IP	Invoice Printed	IIG	T101	04/03/2018 11:29 AM
012	IP	Invoice Printed	IIG	T101	04/03/2018 03:53 PM
013	IU	Invoice Update	IIG	T101	04/03/2018 03:54 PM
014	BO	Back Order	IIG	T101	04/03/2018 03:54 PM

From the **History Inquiry** screen, the Activity Tracking can be viewed for the deleted orders, too. When deleting, you should save the order in the history, to be able to view it in the Inquiry. The deletion of an order is logged also if the Order is deleted in a result of Daily Sales Reports/Updates.



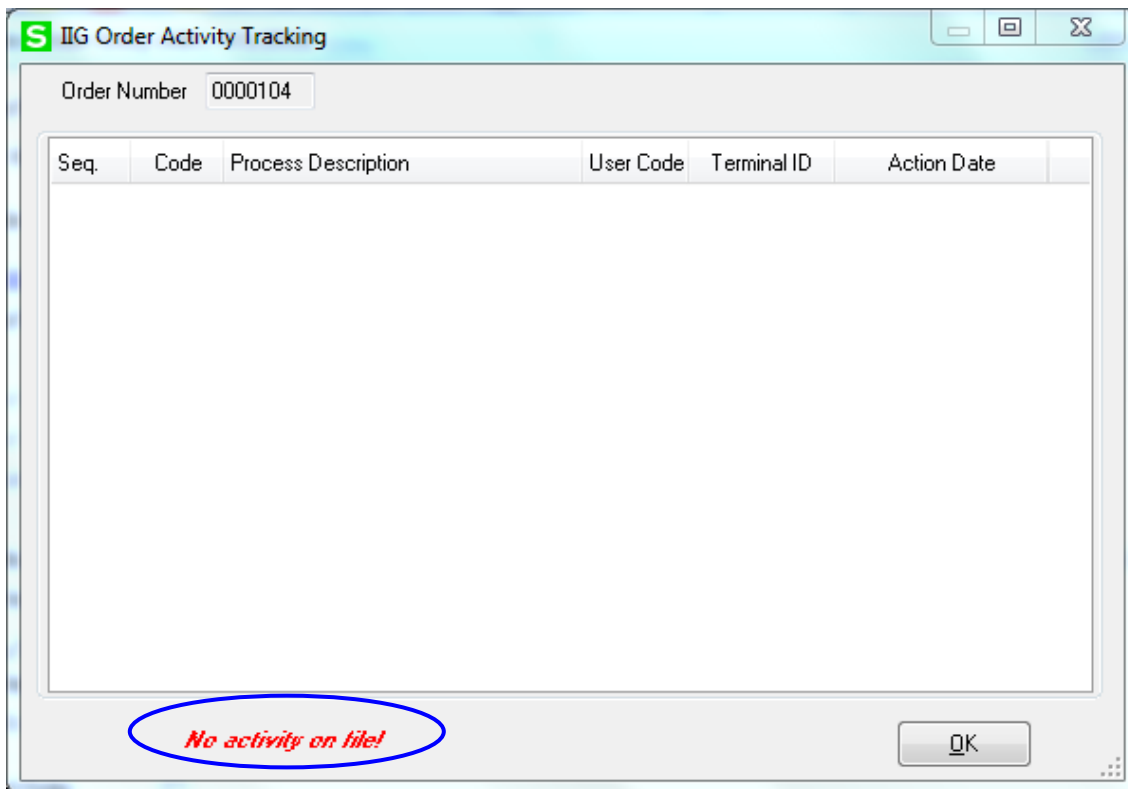
IIG Order Activity Tracking

Order Number 0000200

Seq.	Code	Process Description	User Code	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	04/03/2018 11:28 AM
002	IN	Invoiced Through Invoice Entry	IIG	T101	04/03/2018 11:28 AM
003	IP	Invoice Printed	IIG	T101	04/03/2018 11:28 AM
004	IP	Invoice Printed	IIG	T101	04/03/2018 11:29 AM
005	IP	Invoice Printed	IIG	T101	04/03/2018 03:53 PM
006	IU	Invoice Update	IIG	T101	04/03/2018 03:54 PM
007	OD	Order Deleted	IIG	T101	04/03/2018 03:54 PM

OK

For the orders processed prior to the **Order Process Tracking** enhancement installation, the following message is displayed on the screen:



When running the **Purge Order/Quote History** program to remove sales order and quote history records, which order dates are on or before the date entered, the **Order Activity Tracking** information is deleted as well.

## Invoice History Inquiry

The **Activity** of a Sales Order being invoiced can be viewed from **Invoice History Inquiry** as well.

**S** A/R Invoice History Inquiry (ABC) 4/3/2018

Invoice No. 0100090 Type INV Date 4/3/2018

1. Main | 2. Lines | Source S/O Order No. 0000202

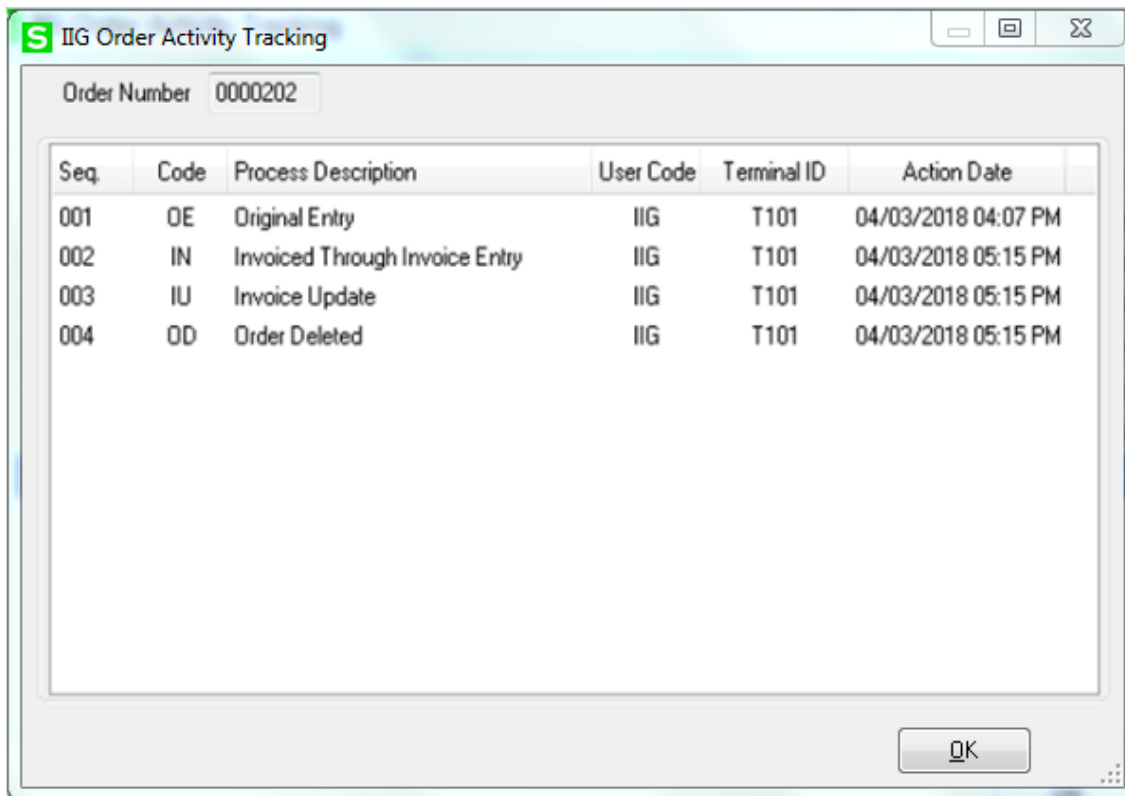
Customer No. 01-ABF American Business Futures

Ship To 2 American Business Futures

Source Journal SO-000019 RMA No. 000022

Terms Code	01 Net 30 Days	Ship Date	4/3/2018	Taxable	.00
Ship Via	UPS RED	Schedule	WI	Nontaxable	.00
FOB		Ship Zone	<input type="button" value="Tracking..."/>	Freight	.00
Customer PO		Weight	70	Sales Tax	.00
Salesperson	01-0100 Jim Kentley	Apply To		Discount	.00
Confirm To	John Quinn	IT User ID		Invoice Total	.00
Comment	Call Ed for credit approval.			Deposit	.00
E-mail	artie@sage.sample.com			Net Invoice	.00
Fax		Batch Fax	<input type="checkbox"/>	Balance	.00

Clicking the **Activity** button displays information for the Sales Order, if there is any for the selected Invoice.



The screenshot shows a window titled "IIG Order Activity Tracking" with a search field for "Order Number" containing "0000202". Below the search field is a table with the following data:

Seq	Code	Process Description	User Code	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	04/03/2018 04:07 PM
002	IN	Invoiced Through Invoice Entry	IIG	T101	04/03/2018 05:15 PM
003	IU	Invoice Update	IIG	T101	04/03/2018 05:15 PM
004	OD	Order Deleted	IIG	T101	04/03/2018 05:15 PM

An "OK" button is located at the bottom right of the window.

When the A/R Purge History program is run for deleting the A/R Invoice History records the program searches for Sales Order number and in case corresponding record is not found in the Sales Order Header and S/O Version History Header files the order's activity tracking information is deleted.

## Order/Quote History Version Inquiry

The **Order/Quote Hist. Version Inquiry** program has been added under the **Sales Order Inquires** menu to allow recording changes made to Sales Order (except printing).

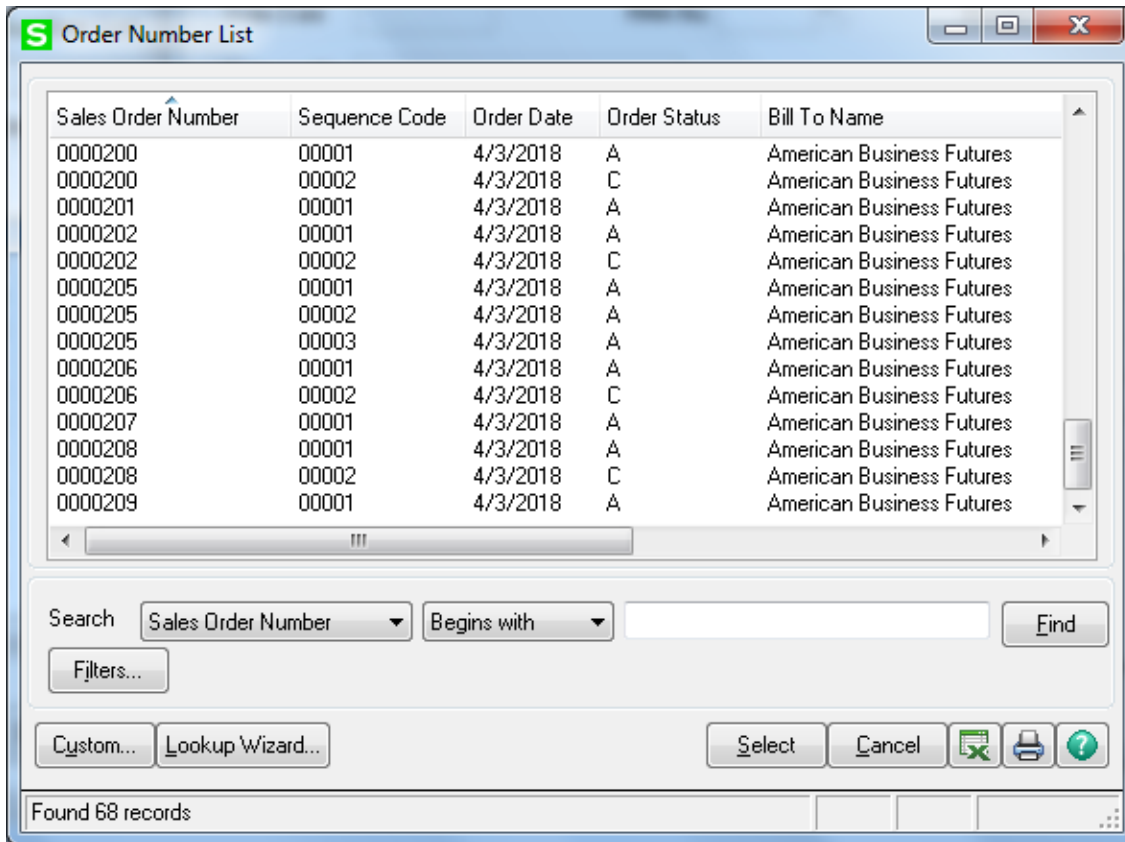
The **Date** and **Time** of the posted change in the Sales Order are displayed on the **Sales Order/Quote History Version Inquiry** screen. The **User Code** of the posted change is displayed in the corresponding field.

The screenshot displays the 'Sales Order and Quote History Version Inquiry (ABC) 4/3/2018' window. The window title bar includes a search icon, navigation arrows, and buttons for 'Activity...', 'Invoices...', and 'Credit...'. The main area is divided into sections for order details, customer information, and shipping information. Two blue circles highlight the date and time fields (4/3/2018 and 11:14 AM) and the User Code field (IIG useriig).

Order Number	0000205	4/3/2018	11:14 AM	Activity...	Invoices...	Credit...
1. Header	2. Address	3. Lines	4. Totals			
Order Date	4/3/2018	RMA No.		Master/Repeating No.		
Customer No.	01-ABF	American Business Futures				
Customer PO						
Status	Active Order	Ship To Addr	2	American Business Futures		
Cancelled Code		Terms Code	01	Net 30 Days		
Last Invoice Date		Ship Via	UPS RED	FOB		
Last Invoice No.		Warehouse	001	EAST WAREHOUSE		
Sales Tax		Confirm To	JOHN QUINN			
Schedule	WI	E-mail	artie@sage.sample.com			
Wisconsin		Comment				
User Code	IIG useriig	Salesperson	0100	Jim Kentley		
		Split Comm.	NO			

The changed Sales Orders themselves can be seen on the **Sales Order/Quote History Version Inquiry** screen, too. All changed Orders have the same **Sales Order Number** but different **Sequence Codes**.

Use the **Lookup** button to select and display the changes made to the sales order.



The **Sales Order/Quote History Version Inquiry** program records also the newly created Sales Orders, including Back Orders being generated during invoice update.

On the **Lines** tab of the **Sales Order/Quote History Version Inquiry** screen, you can see all the changes done on each line item of the Order. Even if an Order line item has already been shipped, and it no longer appears as a line on the **Lines** tab of **Sales Order Entry**, you can see that fully shipped line item here. The Standard Order lines fully shipped as well as Back Order lines with Qty Ordered equal to the Qty Shipped are colored blue.

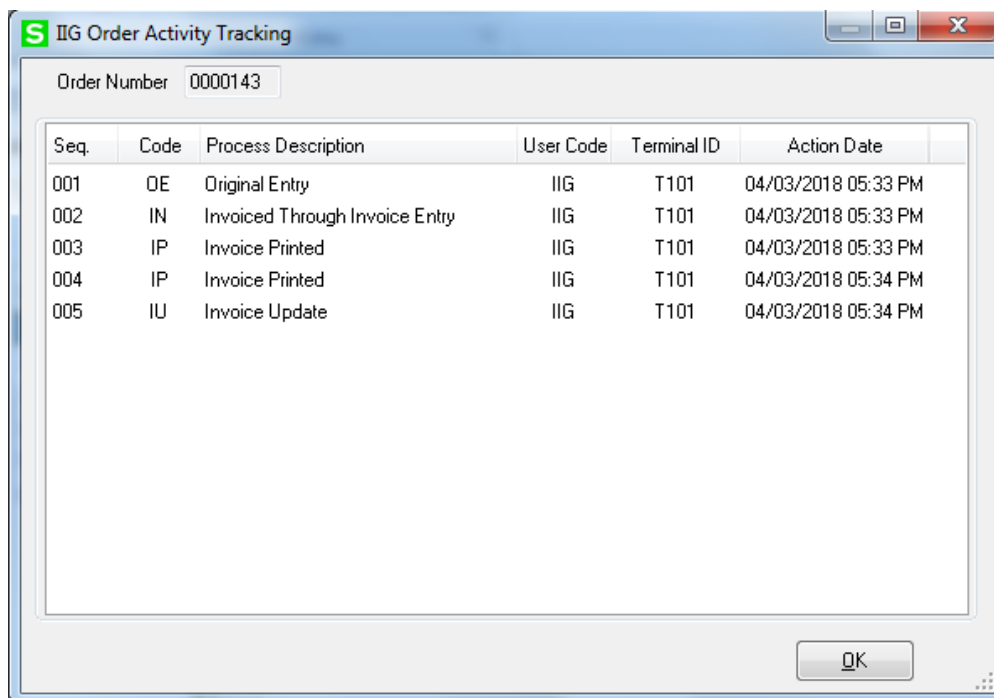


Line No.	Item Code	Item Description	Ordered	Unit Price	Extension
1	1001-HON-H252	HON 2 DRAWER LETTER FLE ...	12.00	78.120	937.44
2	1001-HON-H252LK	HON 2 DRAWER LETTER FLE ...	14.00	80.910	1,132.74
3	1001-HON-H254	HON 4 DRAWER LETTER FLE ...	25.00	117.900	2,947.50
4	1001-HON-H254LK	HON 4 DRAWER LETTER FLE ...	3.00	135.000	405.00
5	2480-8-50	DESK FILE 8" CAP 50	100.00	31.460	3,146.00
6	2481-5-50	DESK FILE 5 1/4" CAP 50	75.00	17.960	1,347.00

Total Amount: 9,915.68

If you want to see all the changes with descriptions done on the Order, click the **Activity** button.

The **IIG Order Activity Tracking** screen is displayed with each change Sequence Number, Code, Process Description, User Code (who performs the change), and Action Date/Time (when the change has occurred).



The screenshot shows a window titled "IIG Order Activity Tracking" with a text field for "Order Number" containing "0000143". Below this is a table with the following data:

Seq.	Code	Process Description	User Code	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	04/03/2018 05:33 PM
002	IN	Invoiced Through Invoice Entry	IIG	T101	04/03/2018 05:33 PM
003	IP	Invoice Printed	IIG	T101	04/03/2018 05:33 PM
004	IP	Invoice Printed	IIG	T101	04/03/2018 05:34 PM
005	IU	Invoice Update	IIG	T101	04/03/2018 05:34 PM

An "OK" button is located at the bottom right of the window.

Here is the list of activity records written in the tracking log file:

- BO Back Order
- CE Change Entry
- CM Credit Memo Entry
- FP Fix Pressed
- IC Invoice Changed
- IE Invoice Entry (1 Step)
- IG Invoice Auto Generated
- IN Invoiced Through Invoice Entry
- IP Invoice Printed
- IU Invoice Update
- IV Invoice Void
- MF Manifested
- MV Manifest Voided
- OD Order Deleted
- OE Original Entry
- OG Order Auto Generated
- OI Order Imported
- OP Sales Order Printed
- PL Packing List Printed
- PT Pick Ticket Printed
- RA Reset All
- SA Shipping Automation Confirmation
- SC Shipping Changed
- SE Shipping Entry Label Printed
- SL Shipping Label Printed
- SV Shipping Void

## IIG Order Process Tracking Report

The **IIG Order Process Tracking Report** has been added to the **Sales Order->Reports** menu to allow printing the order process activity log.

You can choose to include or **Exclude Invoiced Orders**.

The **Exclude Invoiced Orders** checkbox is selected by default meaning the orders already invoiced and updated are skipped from printing:

**S** IIG Order Process Tracking Report (ABC) 4/3/2018

Report Setting: STANDARD [Save]

Description: Order Process Tracking Report

Setting Options

Type: Public [v] Print Report Settings:  Number of Copies: 1 [up/down]

Default Report:  Three Hole Punch:  Collated:

Options

Exclude Invoiced Orders:

Selections

Select Field	Operand	Value
Sales Order Number	All [v]	

Microsoft XPS Document Writer [v] Keep Window Open After Print:  Preview:  [Print] [Preview] [Setup]

Here is an example of the print out:

**IIG Order Process Tracking Report**  
 ABC Distribution and Service Corp. (ABC)  
 Excluding invoiced orders.

Order Number	Customer Number / Name			User Code	Terminal ID
Sequence	Action Date	Process Description			
<b>0000205</b>	<b>01-ABF American Business Futures</b>				
001	4/3/2018 11:14 AM	Original Entry		IIG	T101
002	4/3/2018 11:15 AM	Change Entry		IIG	T101
003	4/3/2018 11:15 AM	Sales Order Printed		IIG	T101
004	4/3/2018 11:17 AM	Invoiced Through Invoice Entry		IIG	T101
005	4/3/2018 11:17 AM	Invoice Printed		IIG	T101
006	4/3/2018 11:18 AM	Invoice Printed		IIG	T101
007	4/3/2018 11:24 AM	Invoice Void		IIG	T101
008	4/3/2018 11:25 AM	Shipping Automation Confirmation		IIG	T101
009	4/3/2018 11:25 AM	Packing List Printed		IIG	T101
010	4/3/2018 11:28 AM	Invoice Printed		IIG	T101
011	4/3/2018 11:29 AM	Invoice Printed		IIG	T101
012	4/3/2018 03:53 PM	Invoice Printed		IIG	T101
013	4/3/2018 03:54 PM	Invoice Update		IIG	T101
001	4/3/2018 05:28 PM	Original Entry		IIG	T101
<b>Total Transactions For Order:</b>			<b>0000207</b>		<b>1</b>
<b>0000209</b>	<b>01-ABF American Business Futures</b>				
001	4/3/2018 05:35 PM	Original Entry		IIG	T101
<b>Total Transactions For Order:</b>			<b>0000209</b>		<b>1</b>
<b>Totals Orders:</b>	<b>22</b>			<b>Transactions:</b>	<b>56</b>

Current Page No.: 2      Total Page No.: 2+      Zoom Factor: 100%

## **Visual Integrator**

The files listed below have been added, or changed, in the Data Dictionary by OPT enhancement for Visual Integrator purposes.

<b>Tables</b>	<b>Fields</b>
SO068_OPTSOVersionHistHeader	All Fields
SO068_OPTSOVersionHistDetail	All Fields
SO068_OPTSOVersionHistDetail	All Fields

## **ODBC Dictionary**

The files listed below have been added or changed in the ODBC Dictionaries by this enhancement for Crystal Reports purposes.

<b>Tables</b>	<b>Fields</b>
SO068_OPTSOProcessTrackWrk	All Fields