



Order Process Tracking For Sage 100 2015

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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.

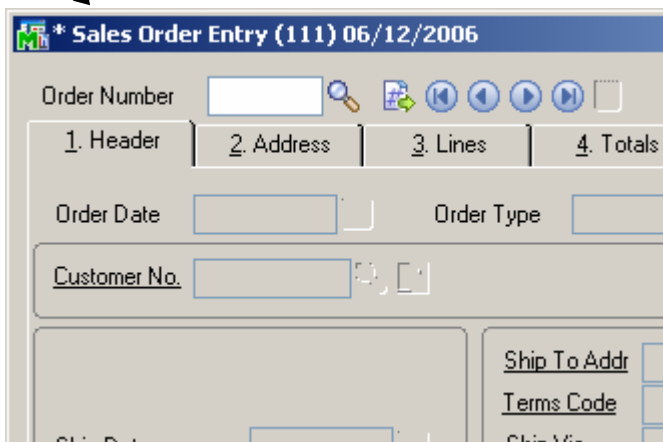
Wait! Before You Install – Do You Use CUSTOM OFFICE?

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 **Customize 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	5.10		AAAAAAAAAAAAAAAAAAAA	BBBBB
IIG Enhancement	5.20		AAAAAAAAAAAAAAAAAAAA...	BBBBB

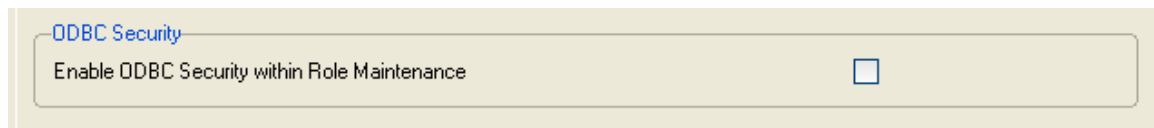
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

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.

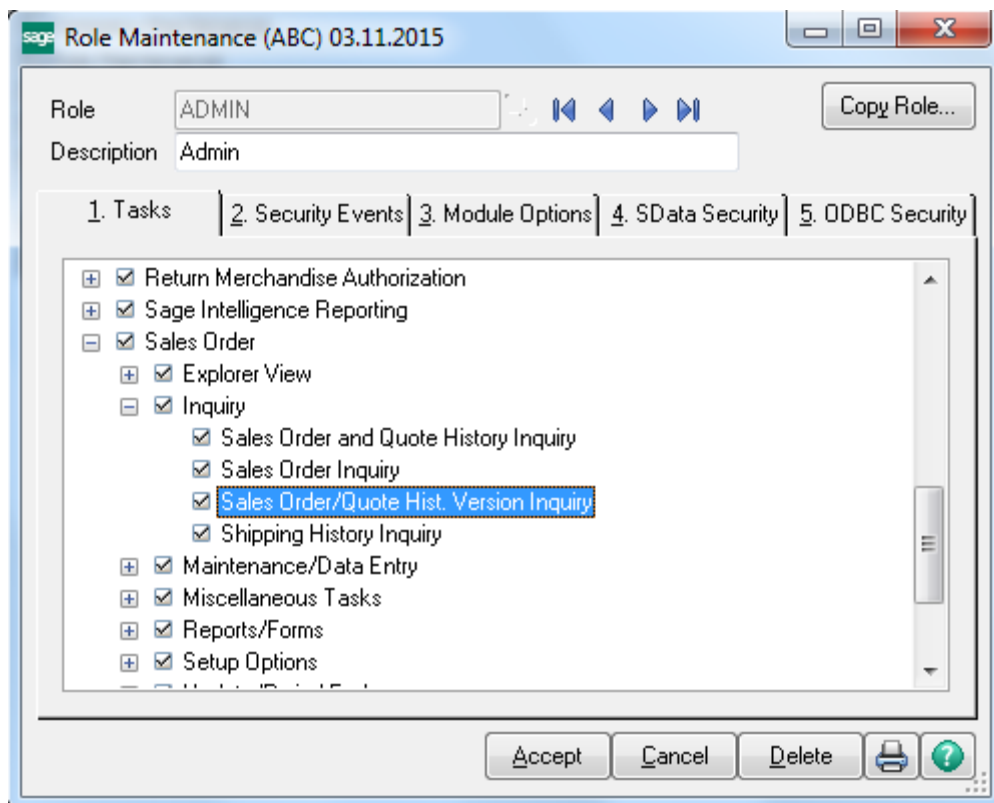
ODBC Security

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.

Sales Order and Quote History Version Inquiry (ABC) 03.11.2015

Order Number: 0000171 | 03.11.2015 | 03:56 PM | Activity... | Invoices... | Credit...

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

Order Date: 01.05.2020 | RMA No.: 0000002 | 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 BLUE | FOB:
Warehouse: 001 | EAST WAREHOUSE
Confirm To: JOHN QUINN
E-mail: artie@sage.sample.com
Comment:
Salesperson: 0100 | Jim Kentley
Split Comm.: NO

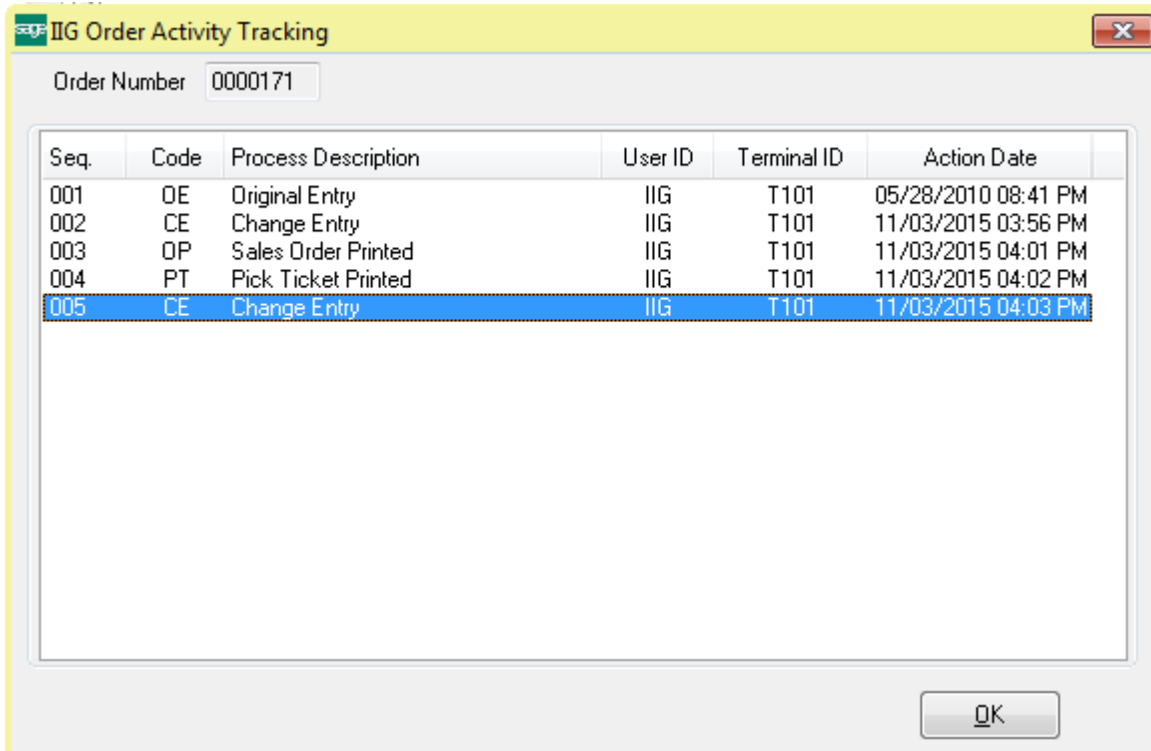
Sales Tax Schedule: WI
Wisconsin

User ID: IIG | Useriig

OK

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 window titled "IIG Order Activity Tracking" with a yellow header bar. Below the header, there is a text box for "Order Number" containing "0000171". The main area of the window contains a table with the following data:

Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	DE	Original Entry	IIG	T101	05/28/2010 08:41 PM
002	CE	Change Entry	IIG	T101	11/03/2015 03:56 PM
003	OP	Sales Order Printed	IIG	T101	11/03/2015 04:01 PM
004	PT	Pick Ticket Printed	IIG	T101	11/03/2015 04:02 PM
005	CE	Change Entry	IIG	T101	11/03/2015 04:03 PM

At the bottom right of the window, there is an "OK" button.

Sales Order/Quote History Inquiry

The **Activity** button has been added to the **Sales Order/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) 03.11.2015

Order Number: 0000171 Activity... Invoices... Credit...

1. Header | 2. Address | 3. Lines | 4. T *Shows all activity on this order.*

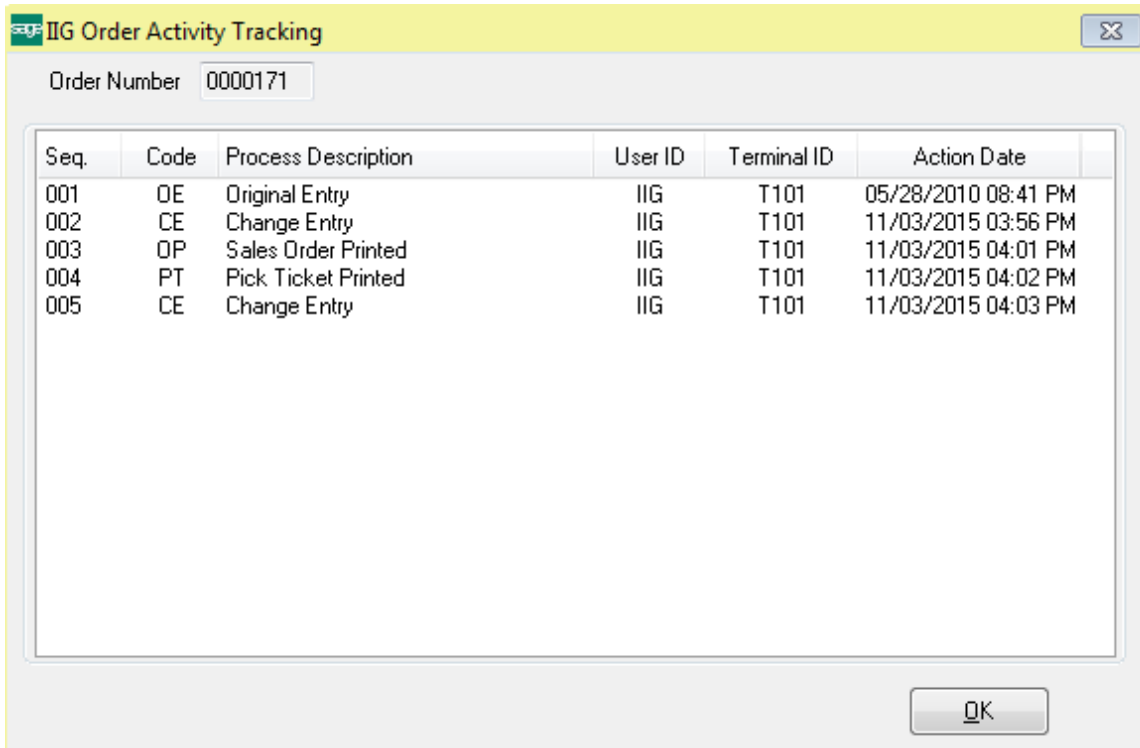
Order Date: 01.05.2020 RMA No.: 0000002 Master/Repeating No.:

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

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 BLUE FOB
Warehouse: 001 EAST WAREHOUSE
Confirm To: JOHN QUINN
E-mail: artie@sage.sample.com
Comment:
Salesperson: 0100 Jim Kentley
Split Comm.: NO

OK ?

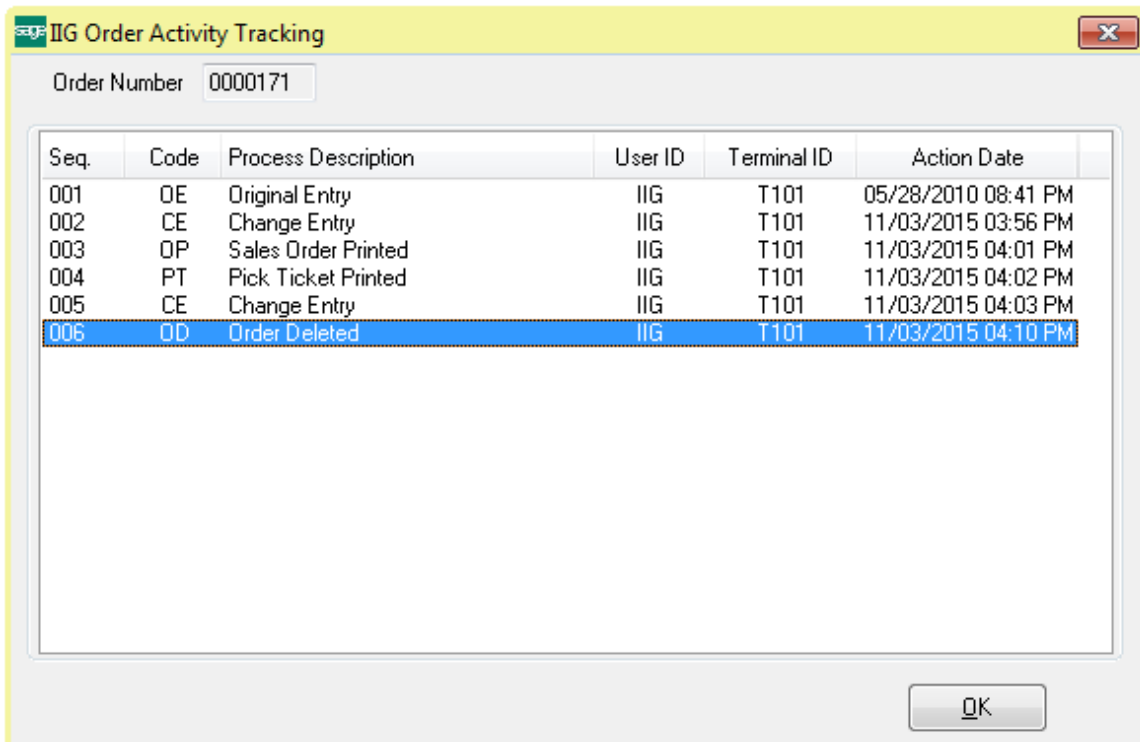


The screenshot shows a window titled "IIG Order Activity Tracking" with a search field for "Order Number" containing "0000171". Below the search field is a table with the following data:

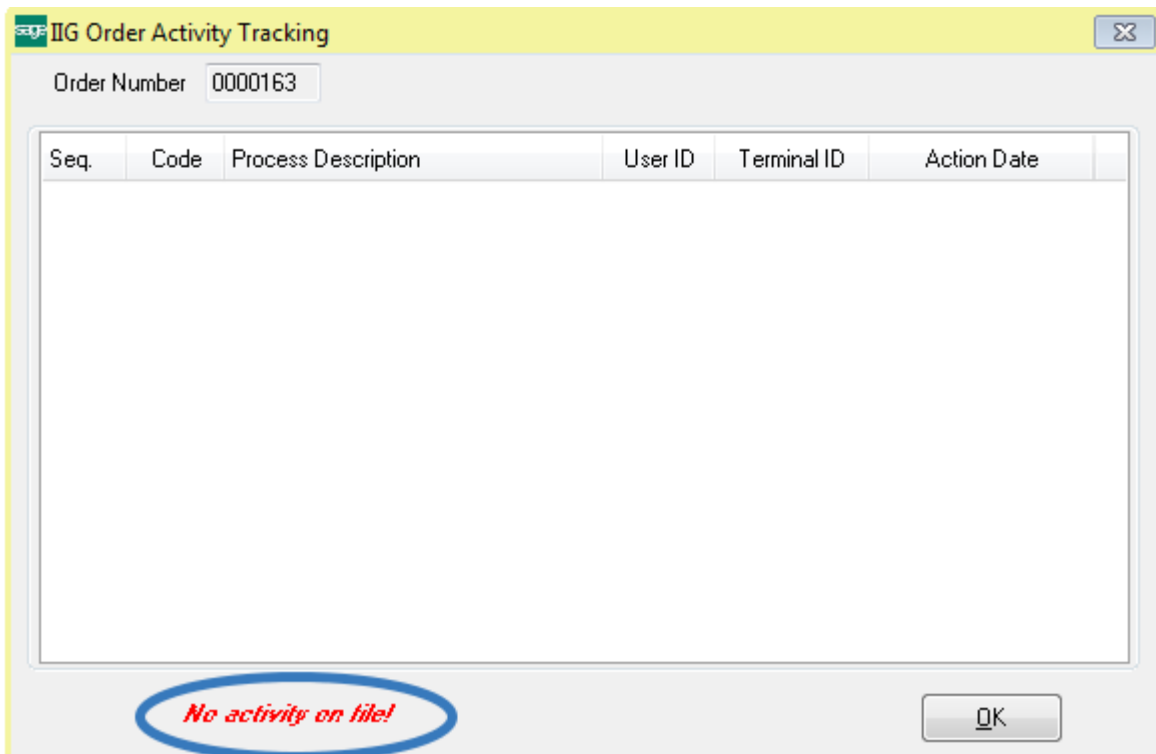
Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	05/28/2010 08:41 PM
002	CE	Change Entry	IIG	T101	11/03/2015 03:56 PM
003	OP	Sales Order Printed	IIG	T101	11/03/2015 04:01 PM
004	PT	Pick Ticket Printed	IIG	T101	11/03/2015 04:02 PM
005	CE	Change Entry	IIG	T101	11/03/2015 04:03 PM

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

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 the order is also logged.



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.

A/R Invoice History Inquiry (ABC) 03.11.2015

Invoice No. 0100055 Type C/M Date 10.05.2020 Current... Tag Detail...
 Source S/O Order No. 0000170 Split Comm... Shipping ...

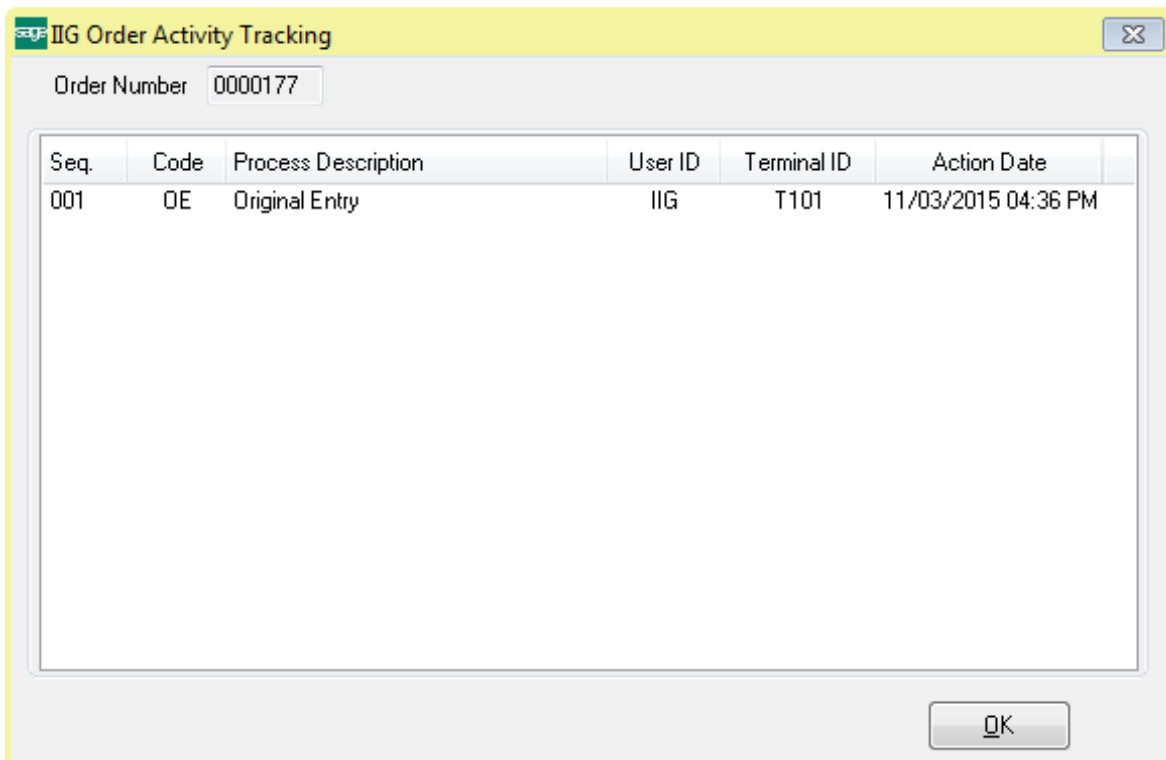
1. Main 2. Lines

Customer No. 01-ABF American Business Futures Addresses...
 Ship To 2 American Business Futures Activity...
 Source Journal SO-000006 RMA No. 0000003 Shows all activity on this order.

Terms Code	01 Net 30 Days	Ship Date	10.05.2020	Taxable	.00
Ship Via	UPS BLUE	Schedule	WI	Nontaxable	81.48-
FOB		Ship Zone		Freight	.00
Customer PO	3456	Weight	175	Sales Tax	.00
Salesperson	01-0100 Jim Kentley	Apply To		Discount	.00
Confirm To	John Quinn	IT User ID		Invoice Total	81.48-
Comment				Deposit	.00
E-mail				Net Invoice	81.48-
Fax		Batch Fax	<input type="checkbox"/>	Balance	81.48-

Tracking... OK Print Help

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



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 ID** of the posted change is displayed in the corresponding field.

Sales Order and Quote History Version Inquiry (ABC) 03.11.2015

Order Number: 0000175 03.11.2015 04:35 PM Activity... Invoices... Credit...

1. Header 2. Address 3. Lines 4. Totals

Order Date: 09.10.2015 RMA No. Master/Repeating No.

Customer No.: 01-ABF American Business Futures

Customer PO

Status: Complete Order

Cancelled Code

Last Invoice Date: 09.10.2015

Last Invoice No.: 0100057

Sales Tax

Schedule: WI

Wisconsin

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

Salesperson: 0100 Jim Kentley

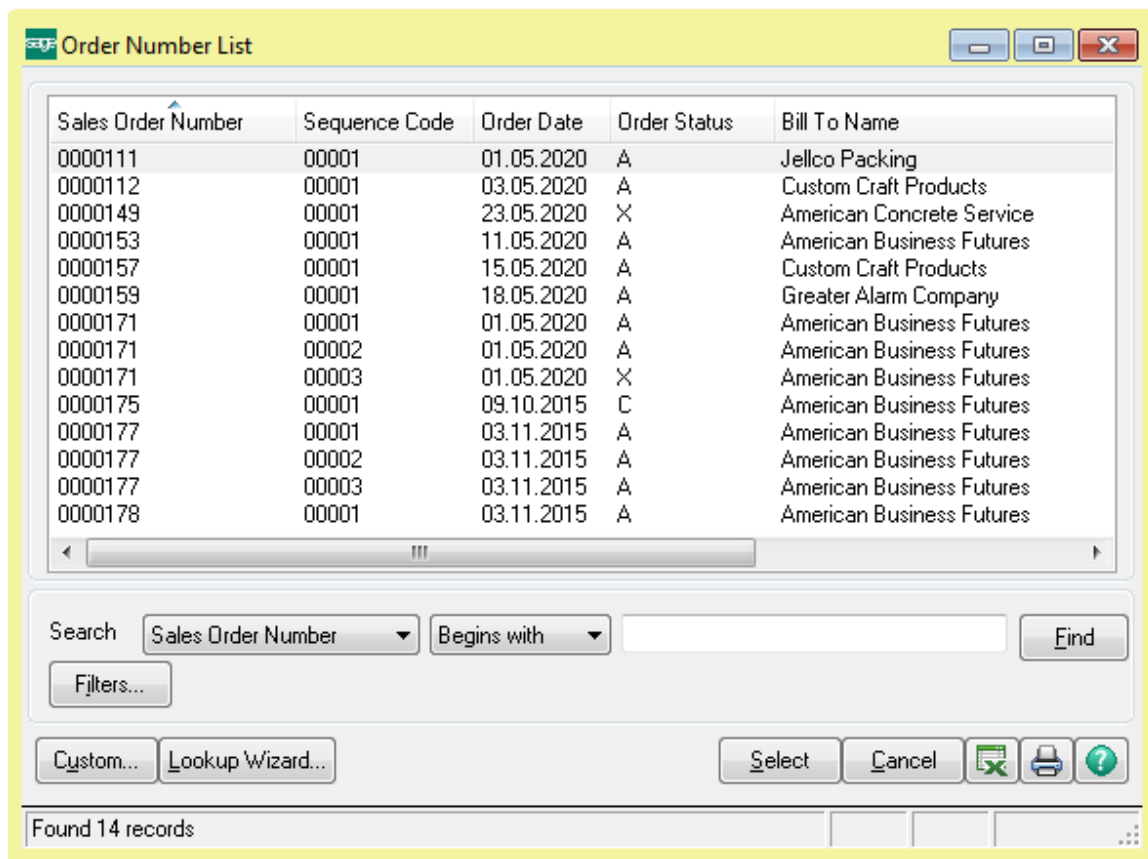
Split Comm.: NO

User ID: IIG Useriig

OK

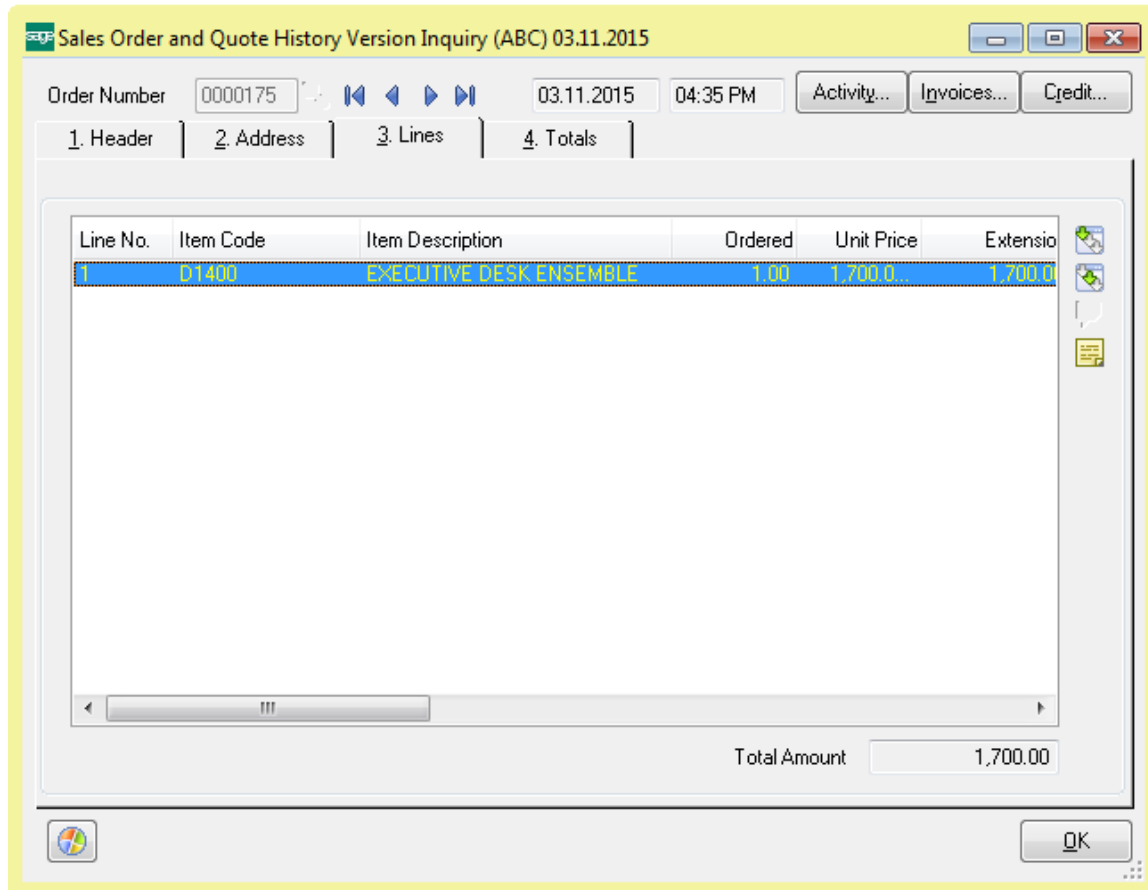
The changed Sales Orders themselves can be seen on the **Sales Order/Quote History Version Inquiry** screen, too. All changed Orders have the same **Sales Order Number** but different **Sequence Codes**.

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



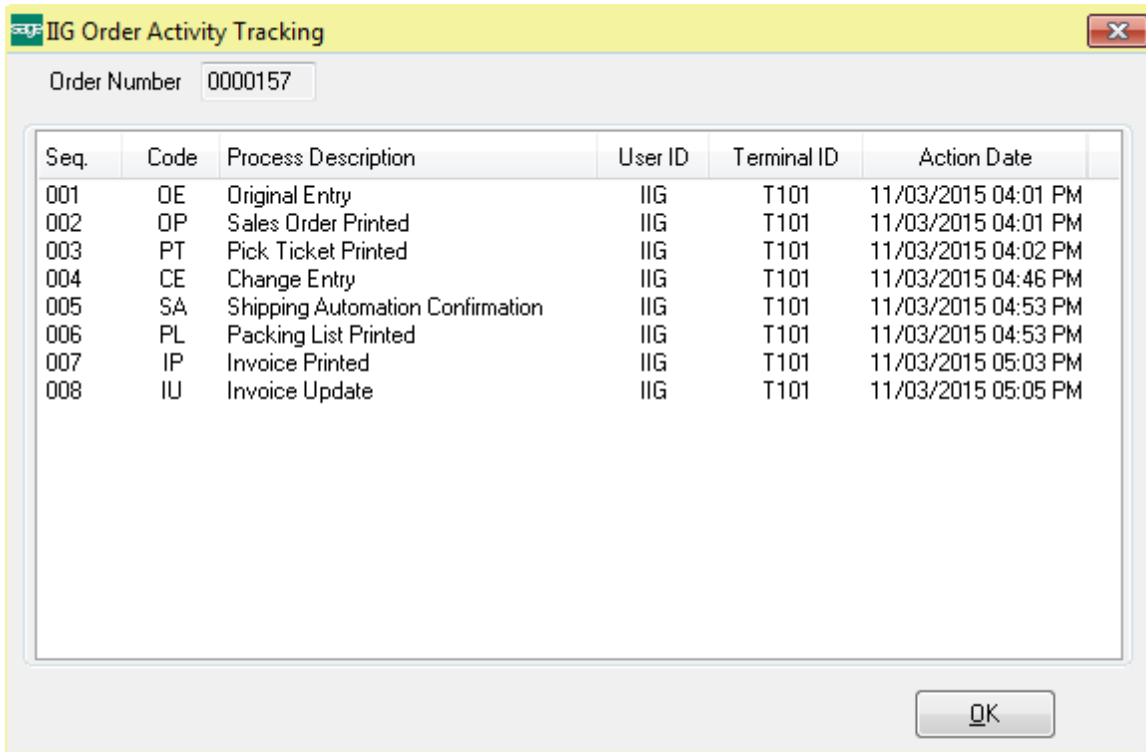
The **Sales Order/Quote History Version Inquiry** program records also the newly created Sales Orders, including Back Orders being generated during invoice update.

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.



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 ID (who performs the change), and Action Date/Time (when the change has occurred).



The screenshot shows a software window titled "IIG Order Activity Tracking" with a yellow header bar. Below the header, there is a text box for "Order Number" containing the value "0000157". The main area of the window contains a table with the following columns: "Seq.", "Code", "Process Description", "User ID", "Terminal ID", and "Action Date". The table lists eight rows of activity, all performed by user "IIG" at terminal "T101" on 11/03/2015. The activities include: Original Entry (04:01 PM), Sales Order Printed (04:01 PM), Pick Ticket Printed (04:02 PM), Change Entry (04:46 PM), Shipping Automation Confirmation (04:53 PM), Packing List Printed (04:53 PM), Invoice Printed (05:03 PM), and Invoice Update (05:05 PM). An "OK" button is located at the bottom right of the window.

Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	11/03/2015 04:01 PM
002	OP	Sales Order Printed	IIG	T101	11/03/2015 04:01 PM
003	PT	Pick Ticket Printed	IIG	T101	11/03/2015 04:02 PM
004	CE	Change Entry	IIG	T101	11/03/2015 04:46 PM
005	SA	Shipping Automation Confirmation	IIG	T101	11/03/2015 04:53 PM
006	PL	Packing List Printed	IIG	T101	11/03/2015 04:53 PM
007	IP	Invoice Printed	IIG	T101	11/03/2015 05:03 PM
008	IU	Invoice Update	IIG	T101	11/03/2015 05:05 PM

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:

IIG Order Process Tracking Report (ABC) 03.11.2015

Report Setting: STANDARD [Save]

Description: Order Process Tracking Report

Setting Options:

- Type: Public
- Print Report Settings:
- Number of Copies: 1
- Default Report:
- Three Hole Punch:
- Collated:

Options:

- Exclude Invoiced Orders?

Selections:

Select Field	Operand	Value
Sales Order Number	All	

Microsoft XPS Document Writer | 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)
						<i>Excluding invoiced orde</i>
ORDER	CUSTOMER					
Seq	Date	Time	Action	User	Terminal ID	
0000103	02-ORANGE			Orange Door & Window Co.		
001	03.11.2015	04:01 PM	Original Entry	IIG	T101	
002	03.11.2015	04:01 PM	Sales Order Printed	IIG	T101	
003	03.11.2015	04:48 PM	Change Entry	IIG	T101	
Total transactions for order				0000103	3	
0000111	02-JELLCO			Jellco Packing		
001	28.05.2010	08:41 PM	Original Entry	IIG	T101	
002	03.11.2015	04:46 PM	Change Entry	IIG	T101	
Total transactions for order				0000111	2	
0000112	02-CUSTOM			Custom Craft Products		
001	28.05.2010	08:41 PM	Original Entry	IIG	T101	
002	03.11.2015	04:47 PM	Change Entry	IIG	T101	
Total transactions for order				0000112	2	