



Order Process Tracking

For Sage ERP MAS 90, MAS 200 and MAS200 SQL

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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
 Sales Order Entry..... 6
 Sales Order/Quote History Inquiry 8
 Invoice History Inquiry..... 11
 Order/Quote History Version Inquiry 13
 IIG Order Process Tracking Report 17

Installation Instructions and Cautions

PLEASE NOTE: MAS 90 must already be installed on your system before installing any IIG enhancement. If not already done, perform your MAS 90 installation and setup now; then allow any updating to be accomplished automatically. Once MAS 90 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

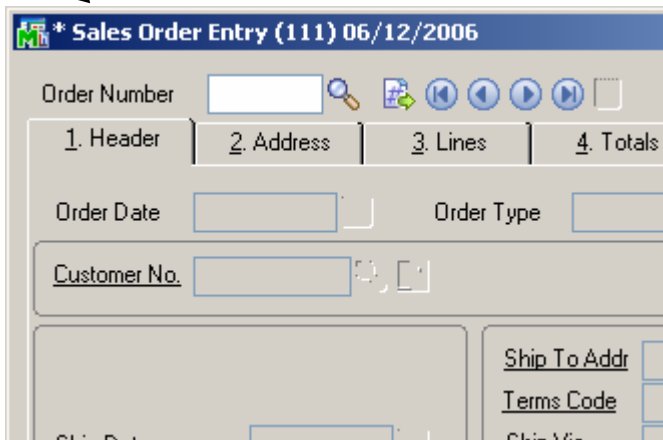
Wait! Before You Install – Do You Use CUSTOM OFFICE?

THIS IS AN IMPORTANT CAUTION: If you have Custom Office installed, **and** if you have modified any MAS 90 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 MAS 90.

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 Name	4.50		AAAAAAAAAAAAAAAAAAAA	BBBBBB

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.

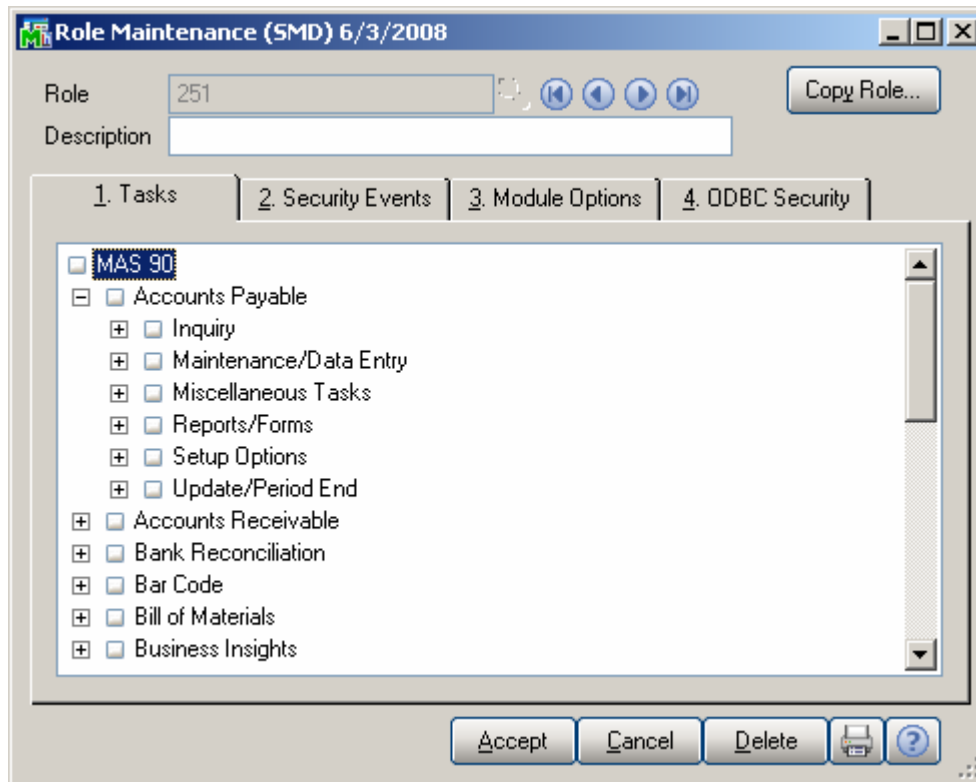
ODBC Security

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

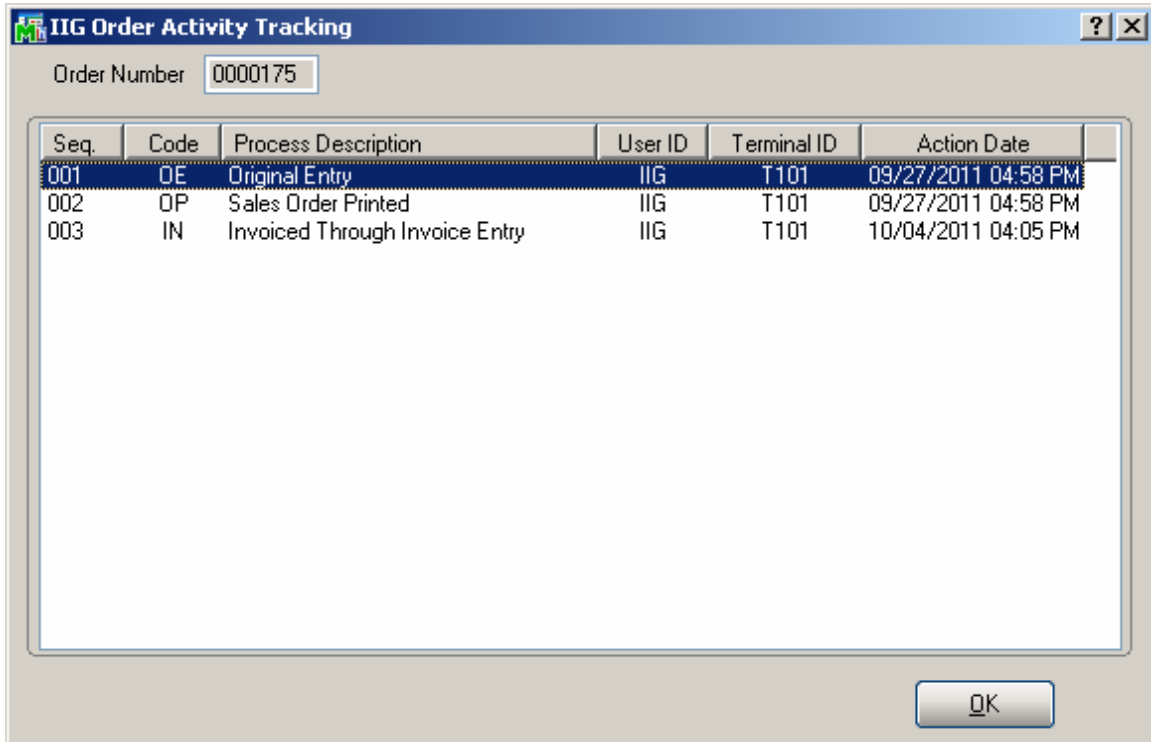
The IIG **Order Process Tracking** enhancement enables tracking all the activity on Sales Order: entry, changes, invoicing as well as printing a report of this tracking. The Order Activity Tracking information can be accessed from Sales Order Inquiry and Sales Order/Quote History Inquiry. The Order Process 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.



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 Quote History Inquiry (ABC) 10/04/2011

Order Number: 0000175 Activity... Invoices... Credit...

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

Order Date: 09/27/2011 RMA No. Master/Repeating No.

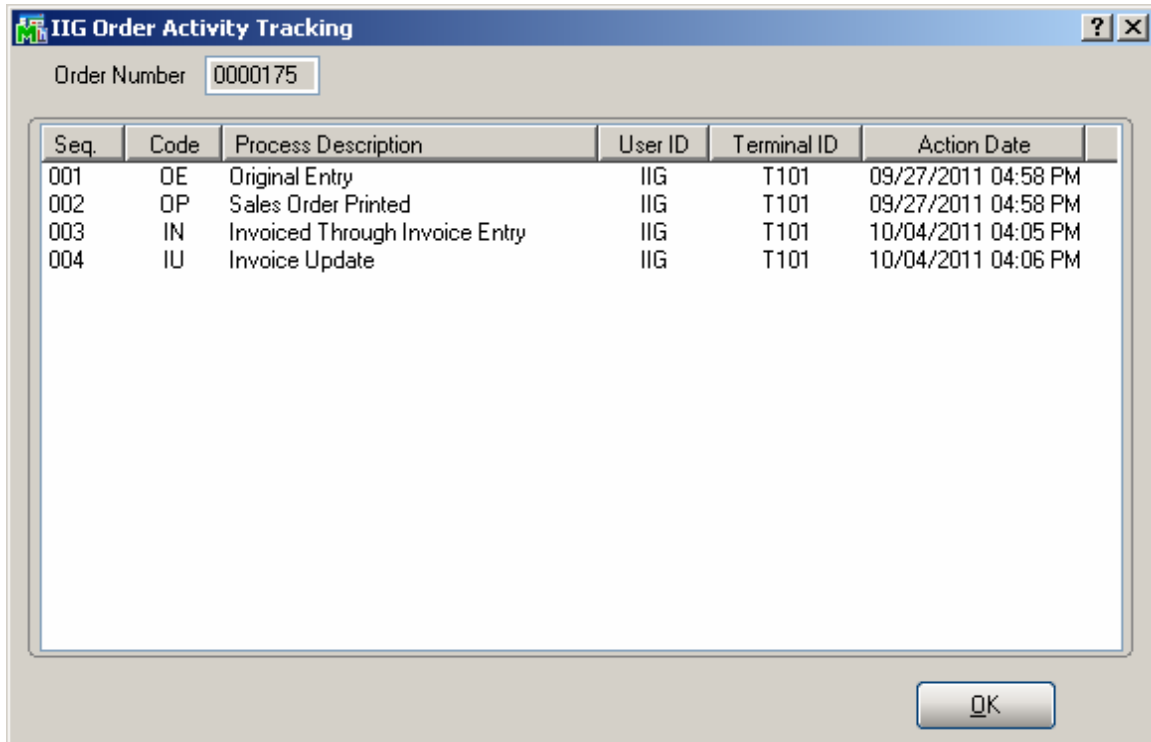
Customer No. 02-ALLENAP Allen's Appliance Repair
Customer PO

Status: Complete Order
Cancelled Code
Last Invoice Date: 10/04/2011
Last Invoice No. 0100056

Ship To Addr: Allen's Appliance Repair
Terms Code: 02
Ship Via: MAIL FOB
Warehouse: 002 WEST WAREHOUSE
Confirm To: JEFF ALLEN
E-mail
Comment
Salesperson: 0400 Ginny Hernandez
Split Comm. NO

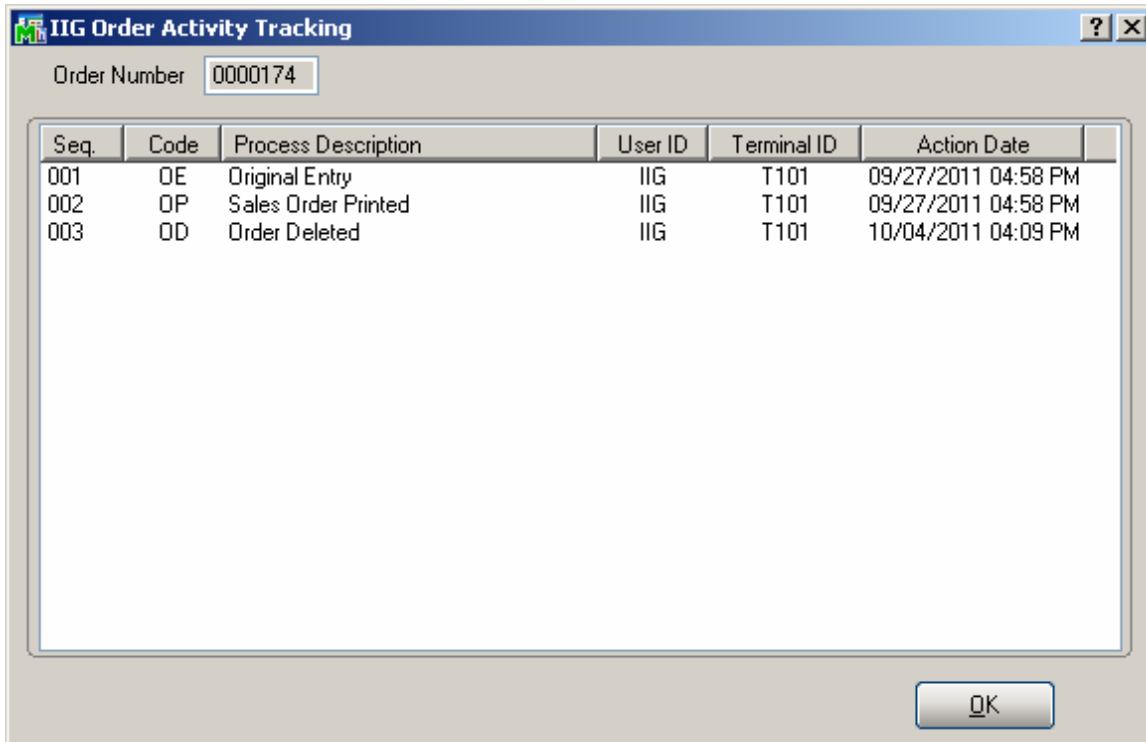
Sales Tax Schedule: CA
California

OK ?

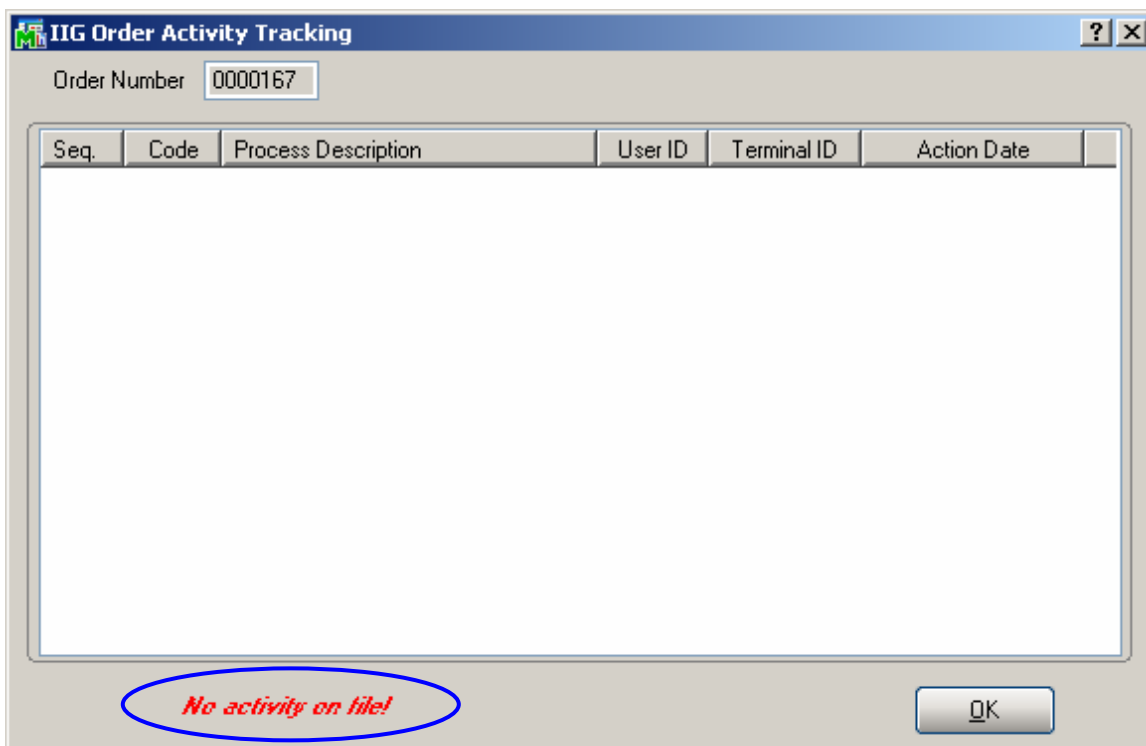


Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	09/27/2011 04:58 PM
002	OP	Sales Order Printed	IIG	T101	09/27/2011 04:58 PM
003	IN	Invoiced Through Invoice Entry	IIG	T101	10/04/2011 04:05 PM
004	IU	Invoice Update	IIG	T101	10/04/2011 04:06 PM

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 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) 10/07/2011

Invoice No. 0100056 Type INV Date 10/04/2011 Current... Tax Detail...
 Source S/O Order No. 0000175 Split Comm... Shipping ...

1. Main 2. Lines

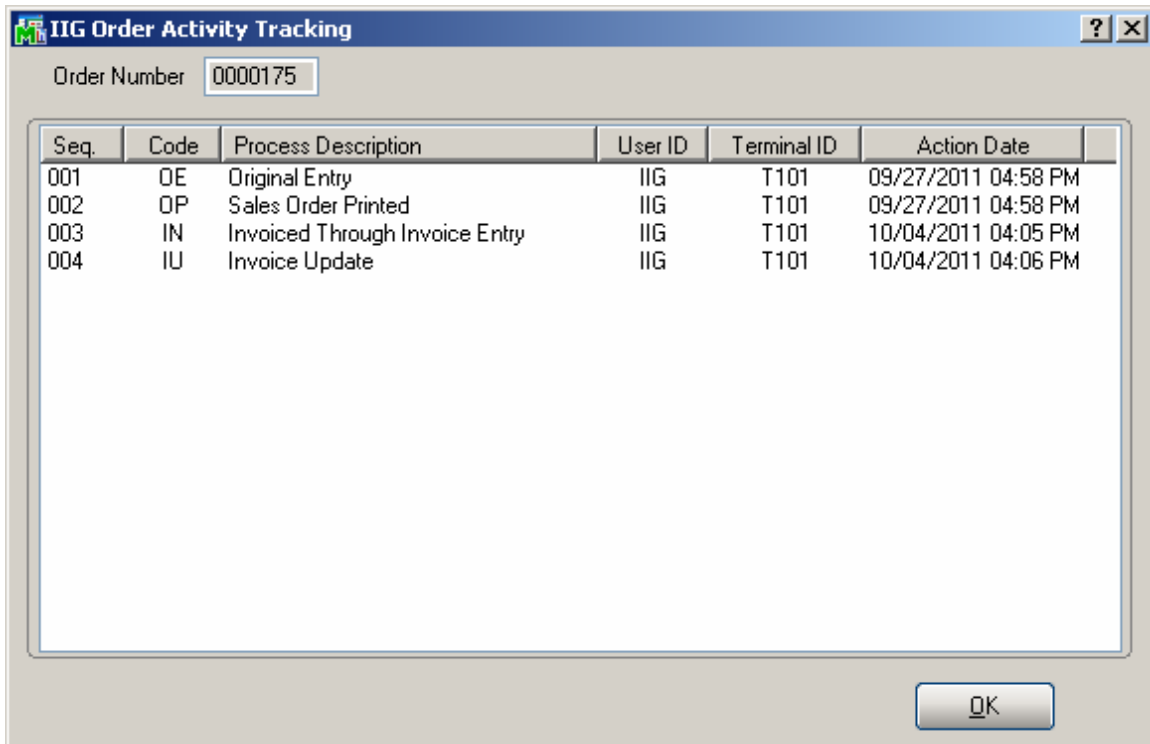
Customer No. 02-ALLENAP Allen's Appliance Repair Addresses...
 Ship To Allen's Appliance Repair Activity...
 Source Journal SO-000007 RMA No. Shows all activity on this order.

Terms Code	02 2% Ten Days, Net 30 D	Ship Date	09/27/2011	Taxable	9,915.68
Ship Via	MAIL	Schedule	CA	Nontaxable	.00
FOB		Ship Zone		Freight	.00
Customer PO		Weight	448	Sales Tax	682.94
Salesperson	02-0400 Ginny Hernandez	Apply To		Discount	495.78
Confirm To	Jeff Allen	IT User ID		Invoice Total	10,102.84
Comment				Deposit	.00
E-mail				Net Invoice	10,102.84
Fax		Batch Fax	<input type="checkbox"/>	Balance	10,102.84

Tracking...

OK Print Help

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 "0000175". 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	09/27/2011 04:58 PM
002	OP	Sales Order Printed	IIG	T101	09/27/2011 04:58 PM
003	IN	Invoiced Through Invoice Entry	IIG	T101	10/04/2011 04:05 PM
004	IU	Invoice Update	IIG	T101	10/04/2011 04:06 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 ID** of the posted change is displayed in the corresponding field.

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.

Sales Order Number	Sequence Code	Order Date	Order Status	Bill To Name
0000174	00001	09/26/2011	X	Breslin Parts Supply
0000175	00001	09/27/2011	A	Allen's Appliance Repair
0000175	00002	09/27/2011	C	Allen's Appliance Repair
0000176	00001	10/07/2011	A	Allen's Appliance Repair
0000176	00002	10/07/2011	A	Allen's Appliance Repair

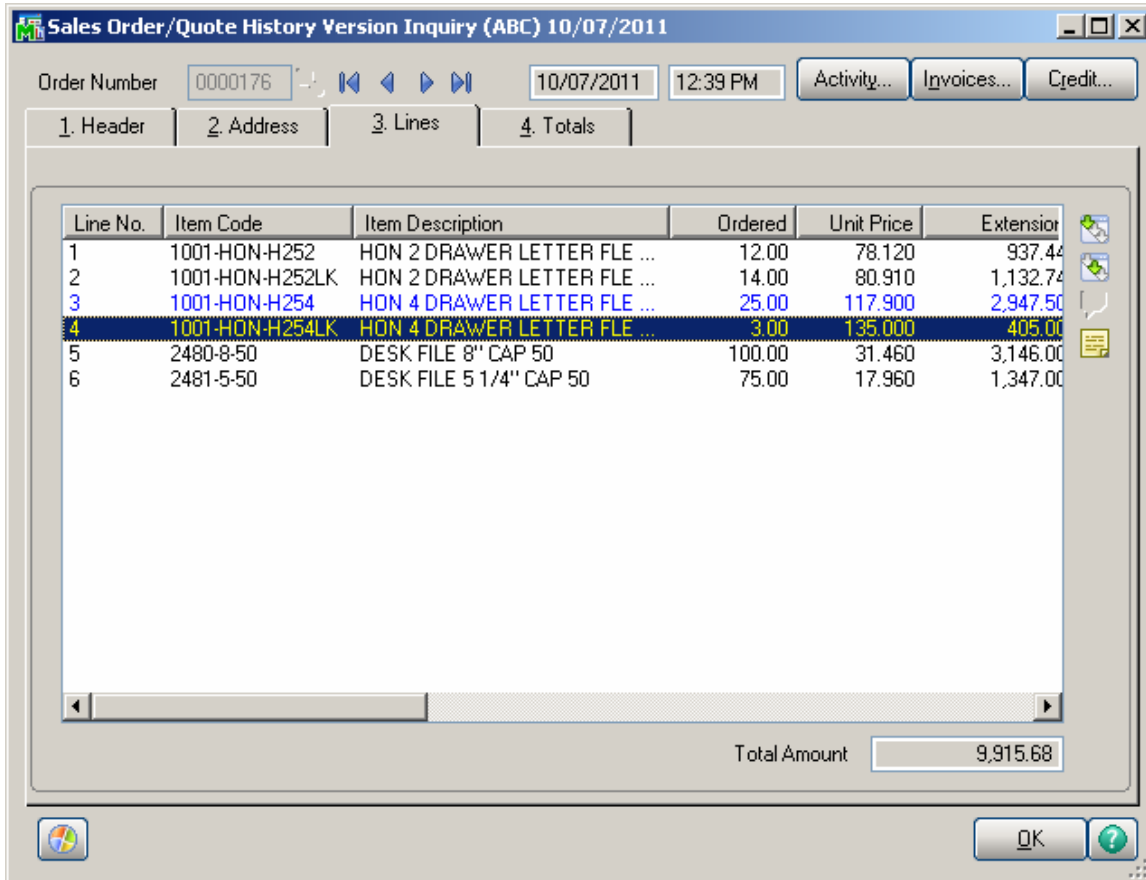
Search: Sales Order Number Begins with Find

Filters... Custom... Select Cancel

Found 5 records

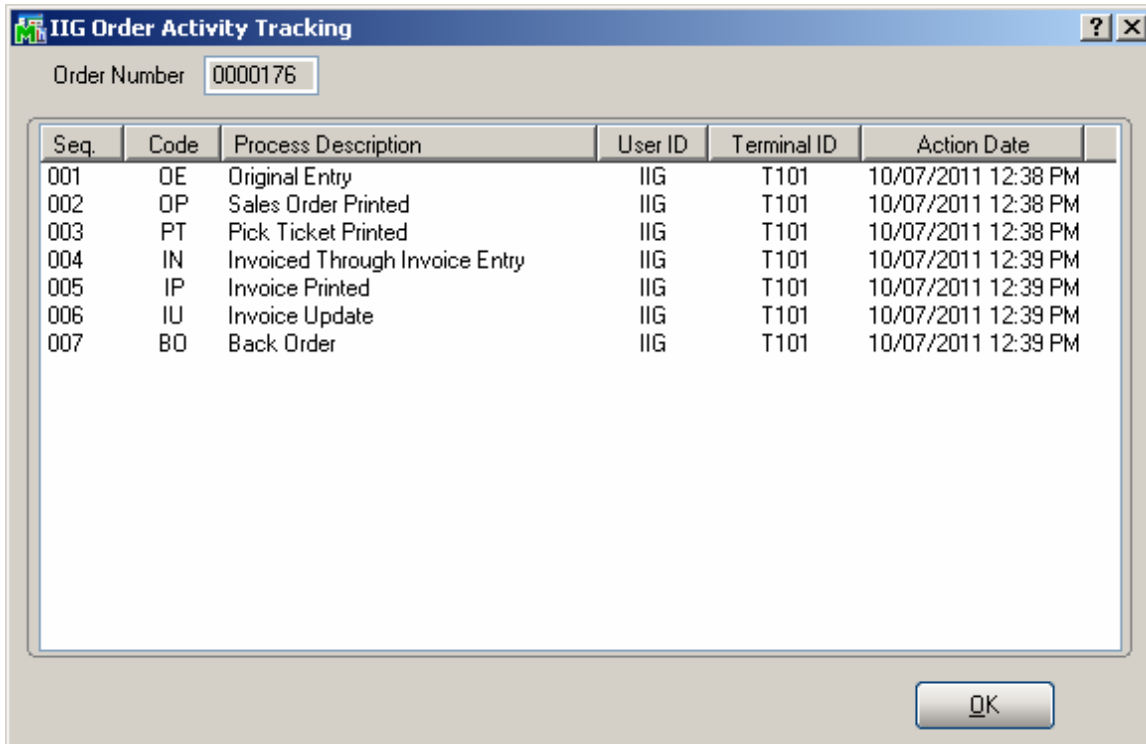
The **Sales Order/Quote History Version Inquiry** program records also the newly created Sales Orders, including Back Orders being generated during invoice update.

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 image shows a software window titled "IIG Order Activity Tracking". At the top, there is a text field for "Order Number" containing the value "0000176". Below this is a table with the following columns: "Seq.", "Code", "Process Description", "User ID", "Terminal ID", and "Action Date". The table contains seven rows of activity data. At the bottom right of the window is an "OK" button.

Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	10/07/2011 12:38 PM
002	OP	Sales Order Printed	IIG	T101	10/07/2011 12:38 PM
003	PT	Pick Ticket Printed	IIG	T101	10/07/2011 12:38 PM
004	IN	Invoiced Through Invoice Entry	IIG	T101	10/07/2011 12:39 PM
005	IP	Invoice Printed	IIG	T101	10/07/2011 12:39 PM
006	IU	Invoice Update	IIG	T101	10/07/2011 12:39 PM
007	BO	Back Order	IIG	T101	10/07/2011 12:39 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:

Report Setting: STANDARD

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	

Printer: \\IIGSERVER\HP LaserJet 1022

Keep Window Open After: Print Preview

Buttons: Print, Preview, Setup, Help

Here is an example of the printout:

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

ORDER		CUSTOMER					
Seq	Date	Time	Action	User	Terminal ID		
0000171	01-ABF	American Business Futures					
001	12/14/2010	06:22 PM	Original Entry	OPT	T101		
002	12/14/2010	06:22 PM	Sales Order Printed	OPT	T101		
003	12/14/2010	06:23 PM	Pick Ticket Printed	IIG	T101		
Total transactions for order				0000171		3	
Total Orders:		1		Transactions:		3	