



Order Process Tracking For Sage 100 2016

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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.

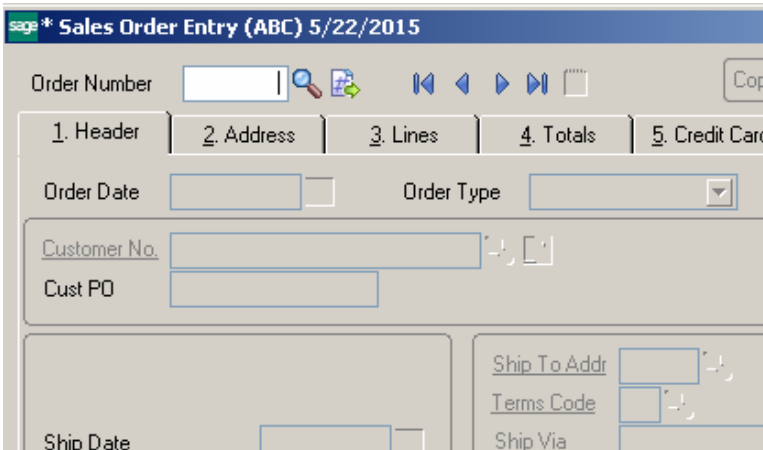
Wait! Before You Install – Do You Use CUSTOM OFFICE?

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**.

The screenshot shows the 'IIG Master Developer Enhancement Registration' window. It includes the following elements:

- Registered Customer:** IIG - Glendale
- Registration Information:**
 - Reseller Name: [Empty]
 - Serial Number: 1111111
 - Customer Number: 222222222
 - User Key: 33333333333333333333
 - Product Key: 55555 55555 55555 55555 55555
- Enhancement Table:**

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement	5.30		AAAAAAAAAAAAAAAAAA	BBBBBB
- Buttons:** OK, Undo, Print Registration Form, Close, and a printer icon.
- Status Bar:** IIG ABX 12/2/2015

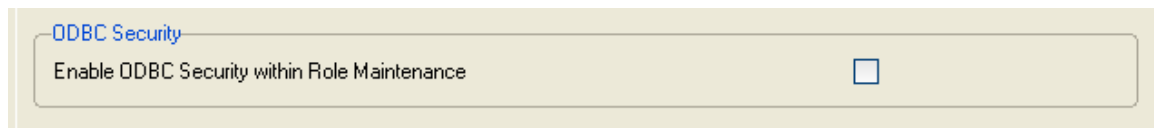
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

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.

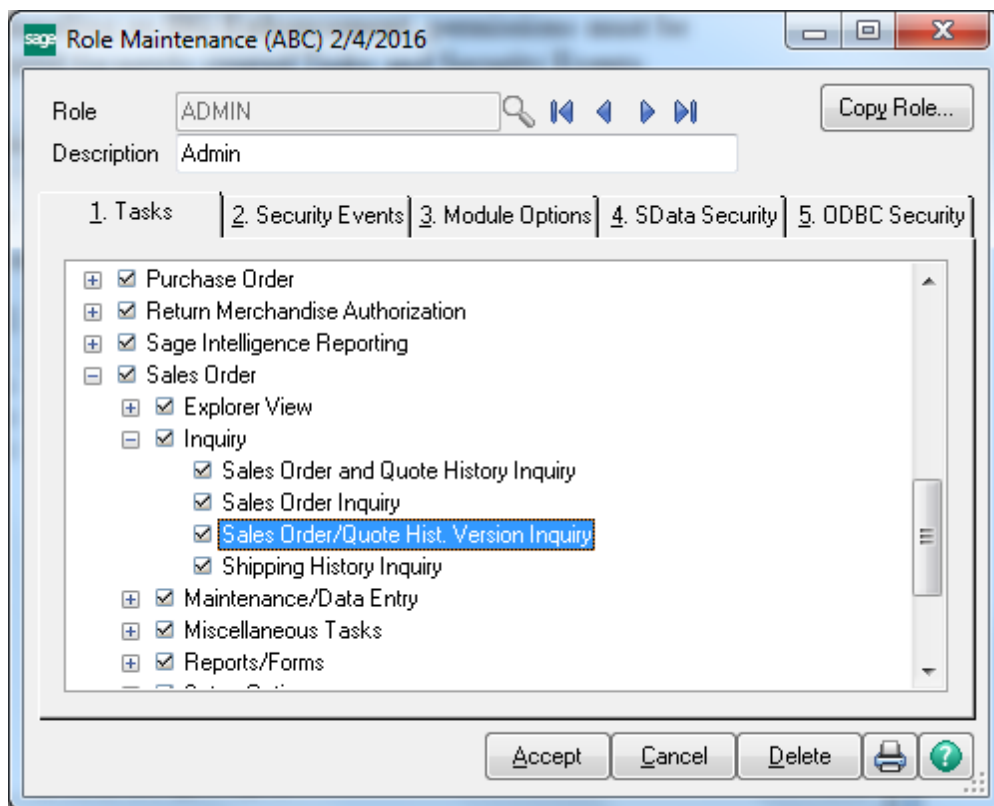
ODBC Security

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.

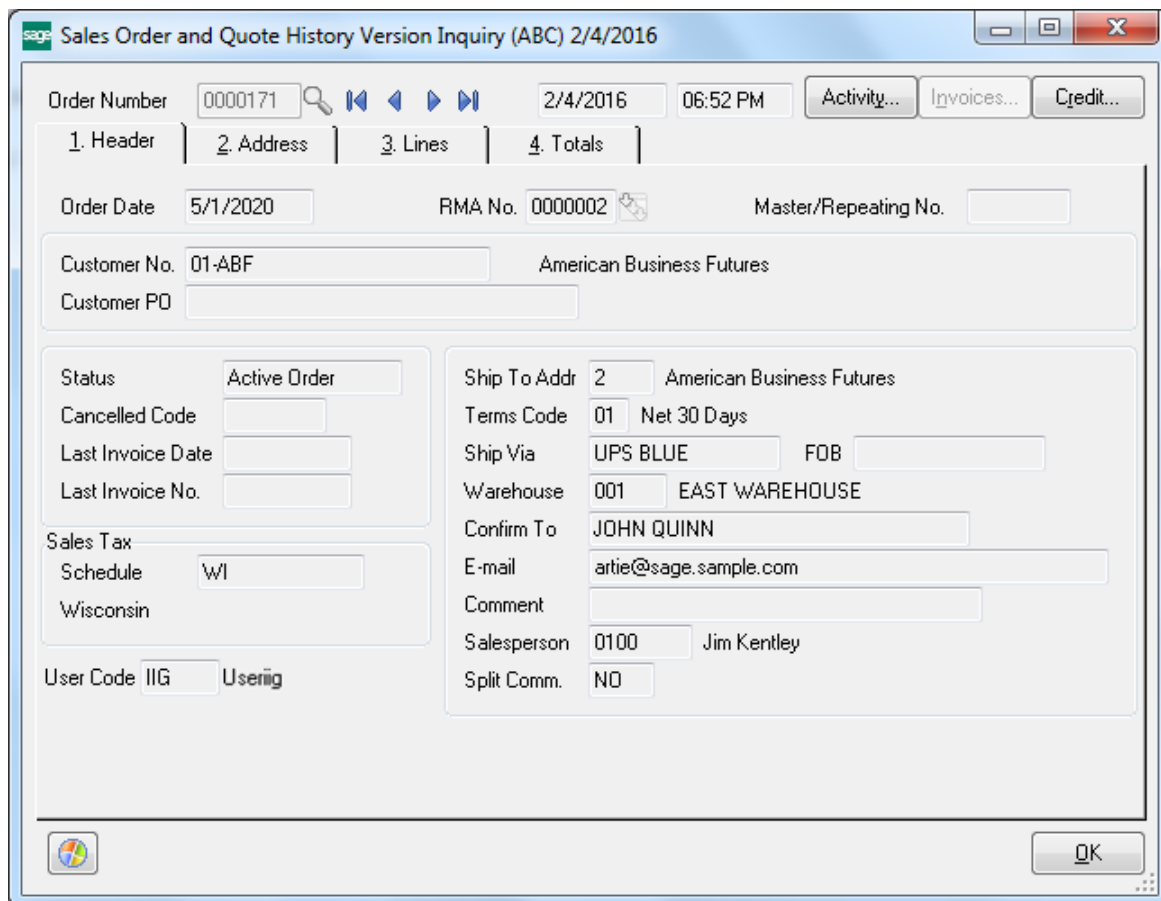


Introduction

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.

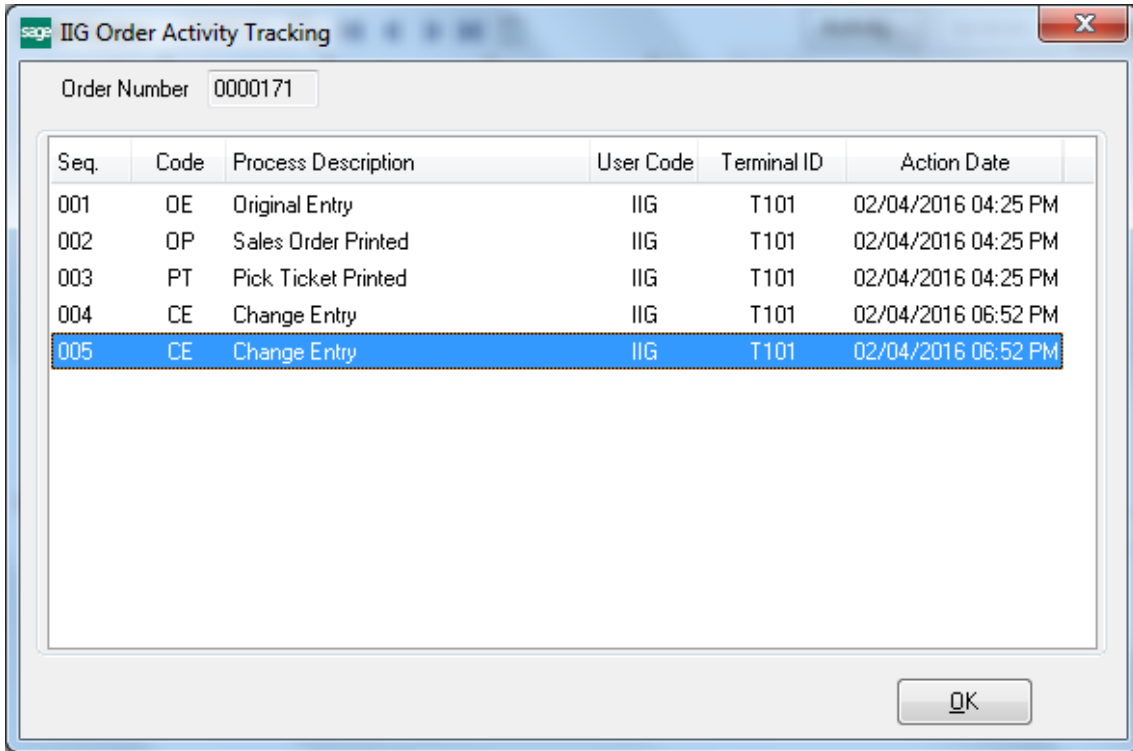
Sales Order Entry

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



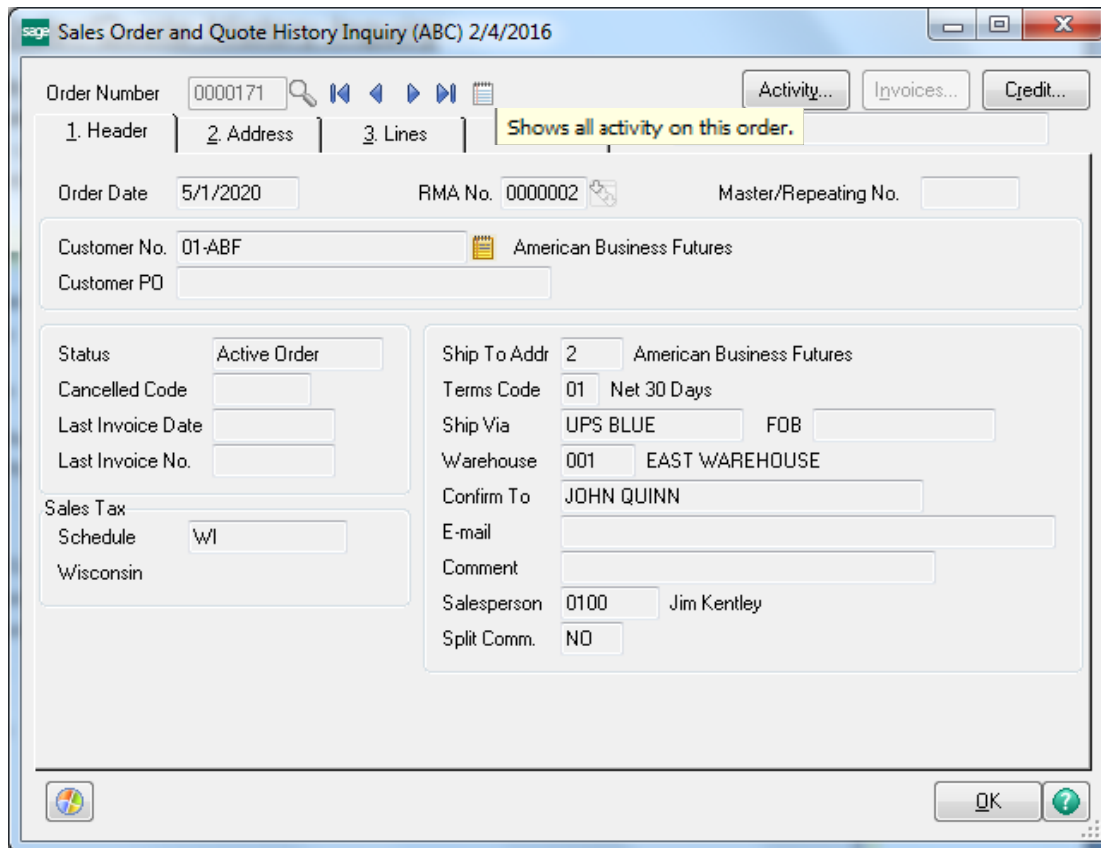
Click the **Activity** button to open the **IIG Order Activity Tracking** screen.

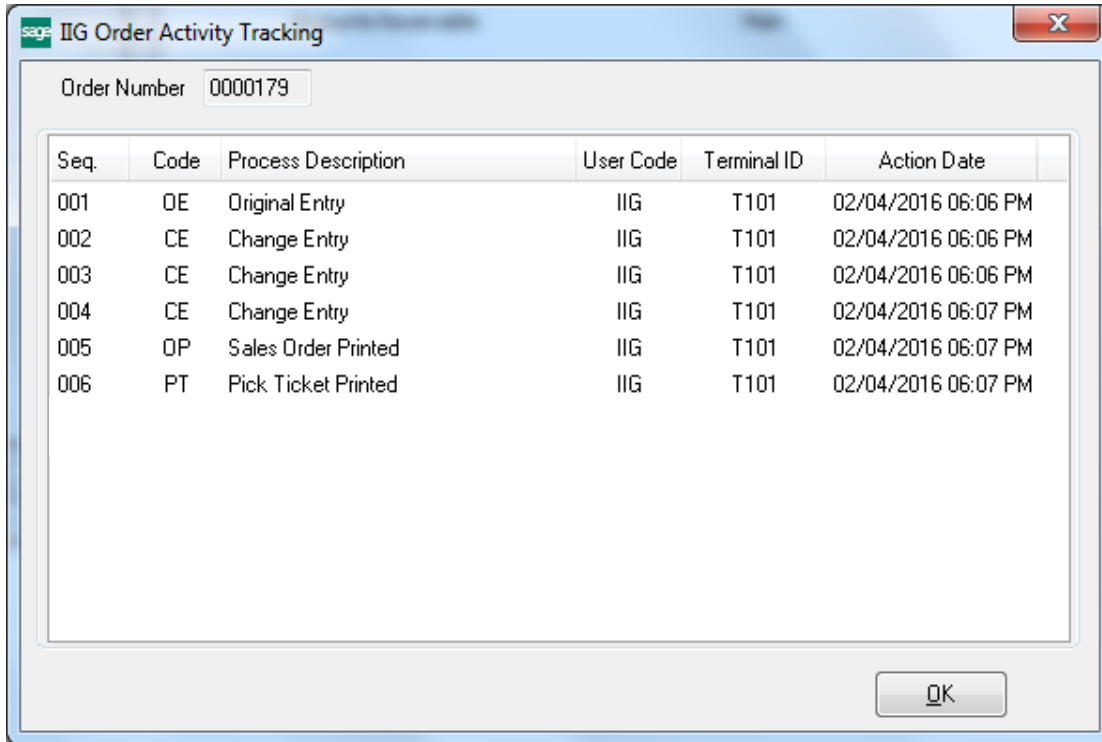
All the activity with the selected order and corresponding invoice, shipping entry is logged.



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.





The screenshot shows a window titled "IIG Order Activity Tracking" with a close button (X) in the top right corner. Below the title bar, there is a text field for "Order Number" containing the value "0000179". The main area of the window contains a table with the following data:

Seq.	Code	Process Description	User Code	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	02/04/2016 06:06 PM
002	CE	Change Entry	IIG	T101	02/04/2016 06:06 PM
003	CE	Change Entry	IIG	T101	02/04/2016 06:06 PM
004	CE	Change Entry	IIG	T101	02/04/2016 06:07 PM
005	OP	Sales Order Printed	IIG	T101	02/04/2016 06:07 PM
006	PT	Pick Ticket Printed	IIG	T101	02/04/2016 06:07 PM

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

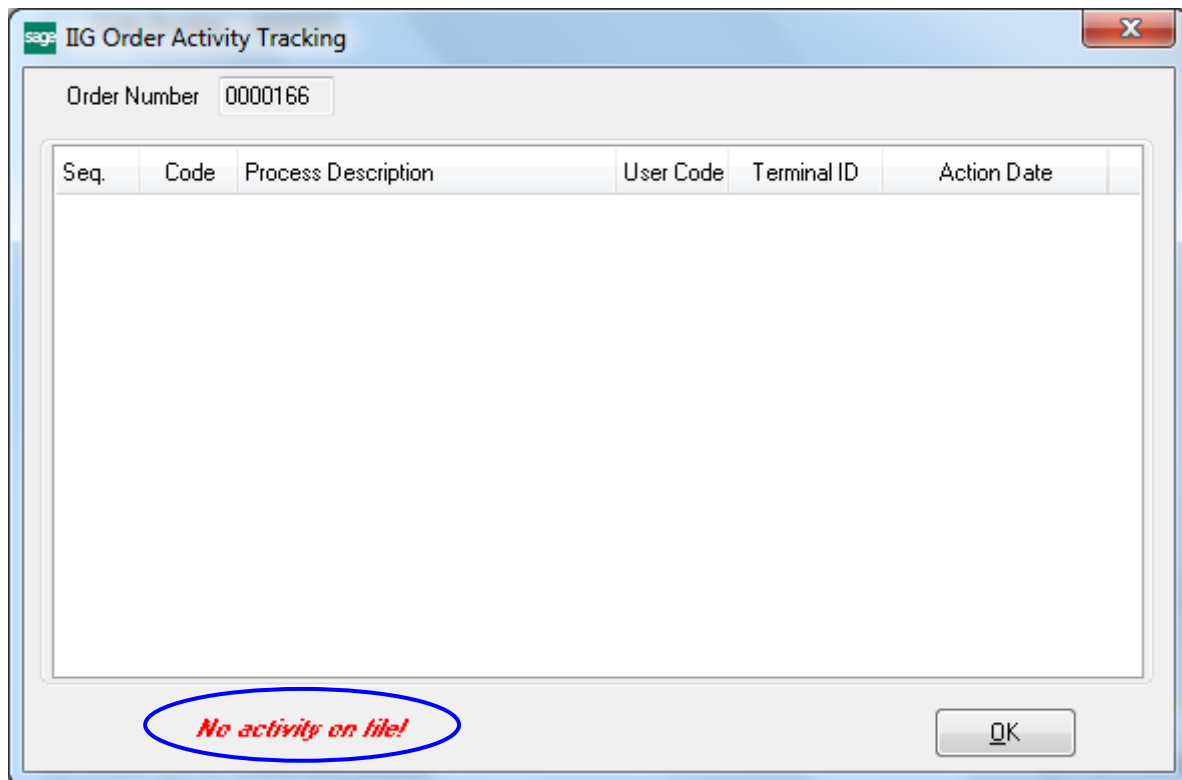
From the **History Inquiry** screen, the Activity Tracking can be viewed for the deleted orders, too. When deleting, you should save the order in the history, to be able to view it in the Inquiry. The deletion of the order is also logged.

Order Number 0000179

Seq.	Code	Process Description	User Code	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	02/04/2016 06:06 PM
002	CE	Change Entry	IIG	T101	02/04/2016 06:06 PM
003	CE	Change Entry	IIG	T101	02/04/2016 06:06 PM
004	CE	Change Entry	IIG	T101	02/04/2016 06:07 PM
005	OP	Sales Order Printed	IIG	T101	02/04/2016 06:07 PM
006	PT	Pick Ticket Printed	IIG	T101	02/04/2016 06:07 PM
007	OD	Order Deleted	IIG	T101	02/04/2016 06:07 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.

sage A/R Invoice History Inquiry (ABC) 2/4/2016

Invoice No. Type Date

Source Order No.

1. Main | 2. Lines |

Customer No. American Business Futures

Ship To American Business Futures

Source Journal RMA No. **Shows all activity on this order.**

Terms Code	<input type="text" value="01"/> Net 30 Days	Ship Date	<input type="text" value="5/10/2020"/>	Taxable	<input type="text" value=".00"/>
Ship Via	<input type="text" value="UPS BLUE"/>	Schedule	<input type="text" value="WI"/>	Nontaxable	<input type="text" value="81.48-"/>
FOB	<input type="text"/>	Ship Zone	<input type="text"/> <input type="button" value="Tracking..."/>	Freight	<input type="text" value=".00"/>
Customer PO	<input type="text" value="3456"/>	Weight	<input type="text" value="175"/>	Sales Tax	<input type="text" value=".00"/>
Salesperson	<input type="text" value="01-0100"/> Jim Kentley	Apply To	<input type="text"/>	Discount	<input type="text" value=".00"/>
Confirm To	<input type="text" value="John Quinn"/>	IT User ID	<input type="text"/>	Invoice Total	<input type="text" value="81.48-"/>
Comment	<input type="text"/>			Deposit	<input type="text" value=".00"/>
E-mail	<input type="text"/>			Net Invoice	<input type="text" value="81.48-"/>
Fax	<input type="text"/>	Batch Fax	<input type="checkbox"/>	Balance	<input type="text" value="81.48-"/>

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 close button (X) in the top right corner. Below the title bar, there is a text field for "Order Number" containing "0000174". The main area contains a table with the following data:

Seq.	Code	Process Description	User Code	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	02/04/2016 04:23 PM
002	CE	Change Entry	IIG	T101	02/04/2016 04:23 PM
003	CE	Change Entry	IIG	T101	02/04/2016 04:24 PM
004	CE	Change Entry	IIG	T101	02/04/2016 04:24 PM
005	CE	Change Entry	IIG	T101	02/04/2016 04:24 PM
006	CE	Change Entry	IIG	T101	02/04/2016 04:25 PM
007	OP	Sales Order Printed	IIG	T101	02/04/2016 04:25 PM
008	PT	Pick Ticket Printed	IIG	T101	02/04/2016 04:25 PM
009	IN	Invoiced Through Invoice Entry	IIG	T101	02/04/2016 04:46 PM
010	IU	Invoice Update	IIG	T101	02/04/2016 04:48 PM

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

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.

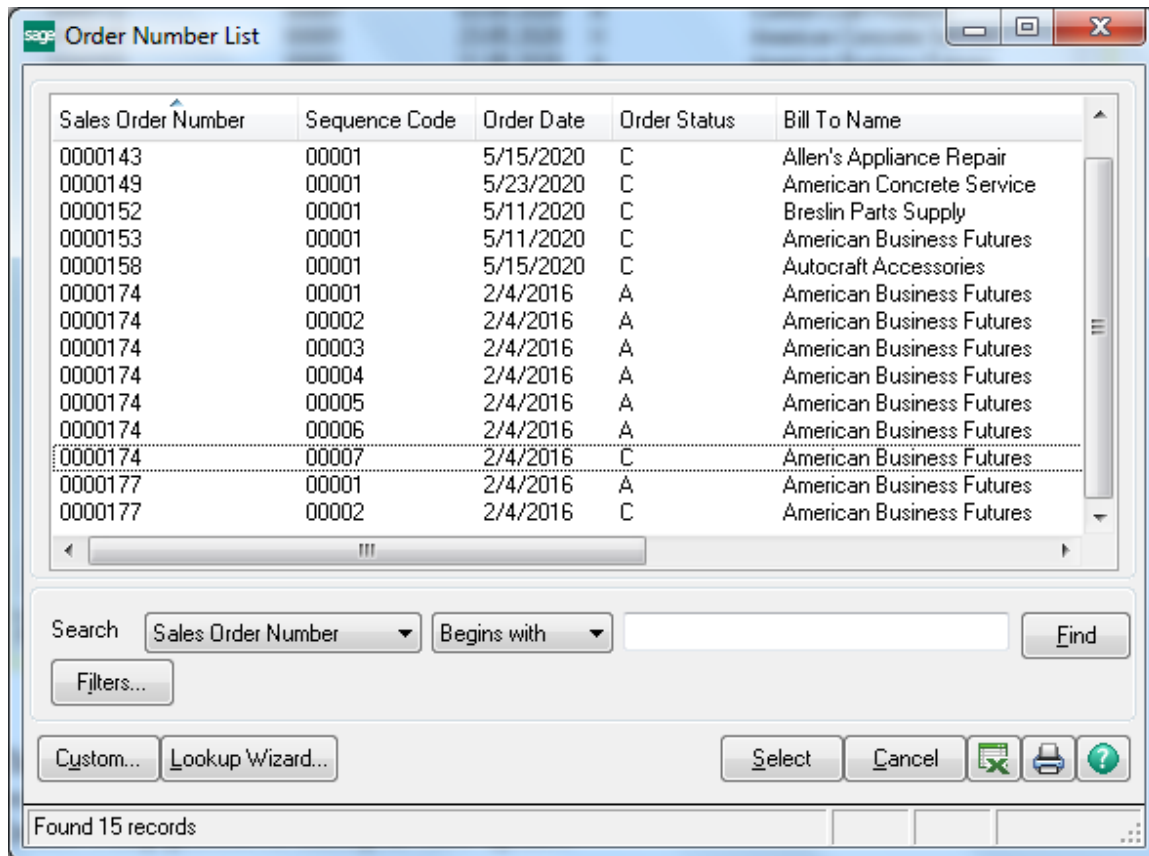
Order/Quote History Version Inquiry

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.

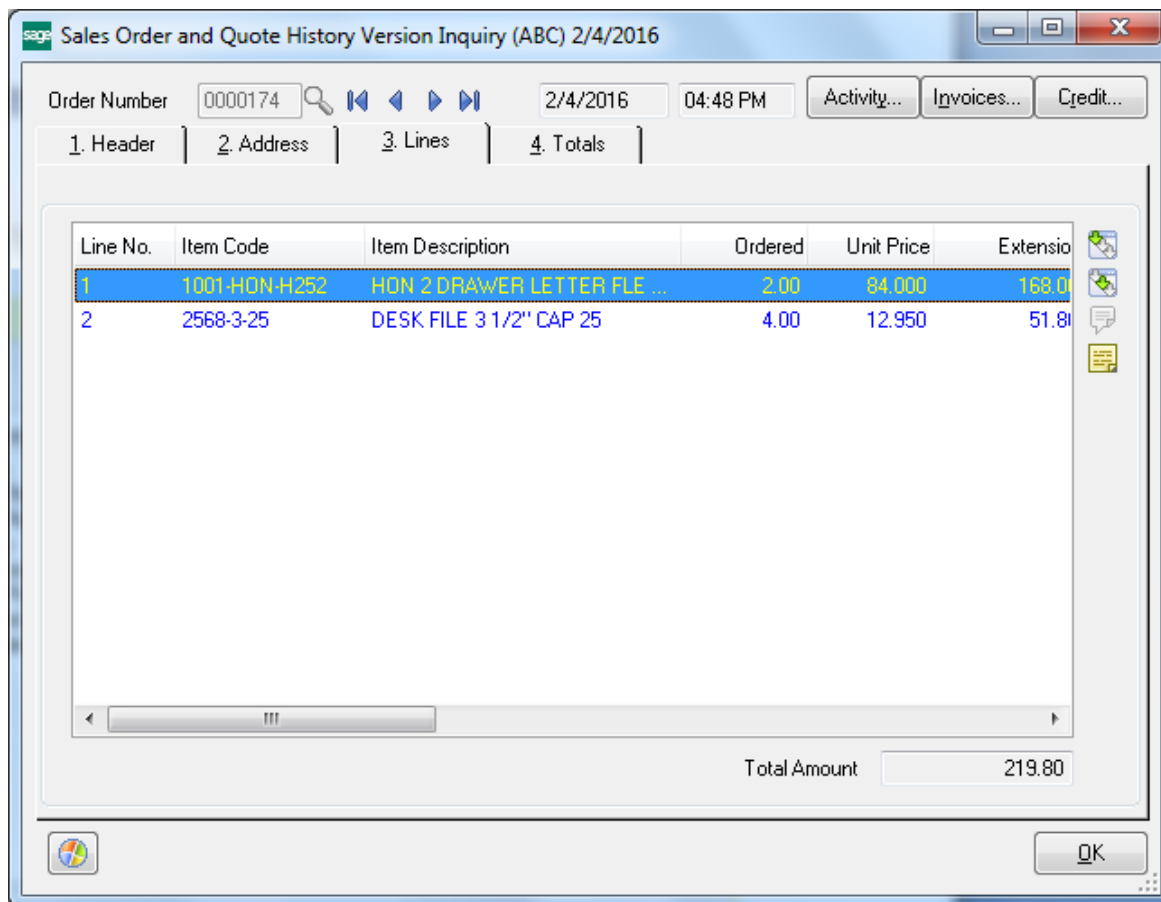
The changed Sales Orders themselves can be seen on the **Sales Order/Quote History Version Inquiry** screen, too. All changed Orders have the same **Sales Order Number** but different **Sequence Codes**.

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 Code (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 close button (X) in the top right corner. Below the title bar, there is a text field for "Order Number" containing the value "0000174". The main area of the window contains a table with the following data:

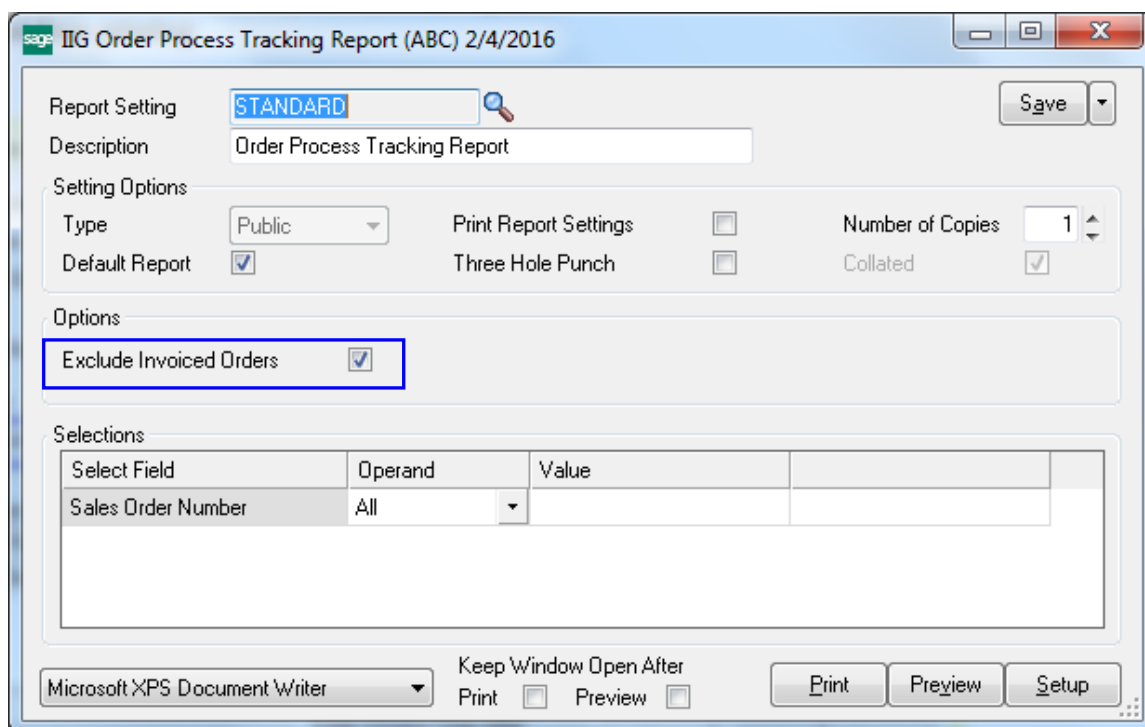
Seq.	Code	Process Description	User Code	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	02/04/2016 04:23 PM
002	CE	Change Entry	IIG	T101	02/04/2016 04:23 PM
003	CE	Change Entry	IIG	T101	02/04/2016 04:24 PM
004	CE	Change Entry	IIG	T101	02/04/2016 04:24 PM
005	CE	Change Entry	IIG	T101	02/04/2016 04:24 PM
006	CE	Change Entry	IIG	T101	02/04/2016 04:25 PM
007	OP	Sales Order Printed	IIG	T101	02/04/2016 04:25 PM
008	PT	Pick Ticket Printed	IIG	T101	02/04/2016 04:25 PM
009	IN	Invoiced Through Invoice Entry	IIG	T101	02/04/2016 04:46 PM
010	IU	Invoice Update	IIG	T101	02/04/2016 04:48 PM

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

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:



Here is an example of the print out:

IIG Order Process Tracking Report								
ABC Distribution and Service Corp. (ABC)								
<i>Excluding invoiced orders.</i>								
Order Number	Customer Number	Name						
Sequence	Date	Time	Action	User Code	Terminal ID			
0000103 02-ORANGE Orange Door & Window Co.								
001	2/4/2016	04:25 PM	Original Entry	IIG	T101			
002	2/4/2016	04:25 PM	Sales Order Printed	IIG	T101			
Total transactions for order				0000103	2			
0000115 01-ABF American Business Futures								
001	2/4/2016	04:25 PM	Original Entry	IIG	T101			
002	2/4/2016	04:25 PM	Sales Order Printed	IIG	T101			
003	2/4/2016	04:25 PM	Pick Ticket Printed	IIG	T101			
Total transactions for order				0000115	3			
0000116 01-BRESLIN Breslin Parts Supply								
001	2/4/2016	04:25 PM	Original Entry	IIG	T101			
002	2/4/2016	04:25 PM	Sales Order Printed	IIG	T101			
003	2/4/2016	04:25 PM	Pick Ticket Printed	IIG	T101			

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