



Order Process Tracking For Sage 100 ERP 2014

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Table of Contents

Installation Instructions and Cautions..... 3
 Wait! Before You Install – Do You Use CUSTOM OFFICE? 3
 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

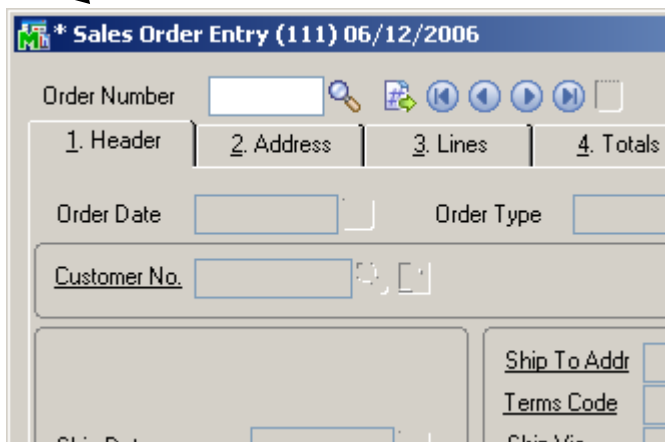
PLEASE NOTE: SAGE 100 ERP must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 ERP installation and setup now; then allow any updating to be accomplished automatically.

Once SAGE 100 ERP 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 ERP 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 ERP.

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 'SAP IIG Master Developer Enhancement Registration' dialog box. It features a 'Registered Customer' field containing 'IIG - Glendale'. A 'Registration Information' section includes several input fields: 'Reseller Name' (empty), 'Serial Number' (1111111), 'Customer Number' (222222222), 'User Key' (33333333333333333333), and 'Product Key' (five 55555 fields). Below this is a table with columns: Enhancement, Level, Release Date, Serial Number, and Unlocking Key. The table contains one row: 'IIG Enhancement', '5.10', an empty field, 'AAAAAAAAAAAAAAAAA', and 'BBBBB'. At the bottom are buttons for 'Print Registration Form', 'Close', and 'Undo'. The status bar at the bottom right shows 'IIG ABC 4/7/2014'.

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.

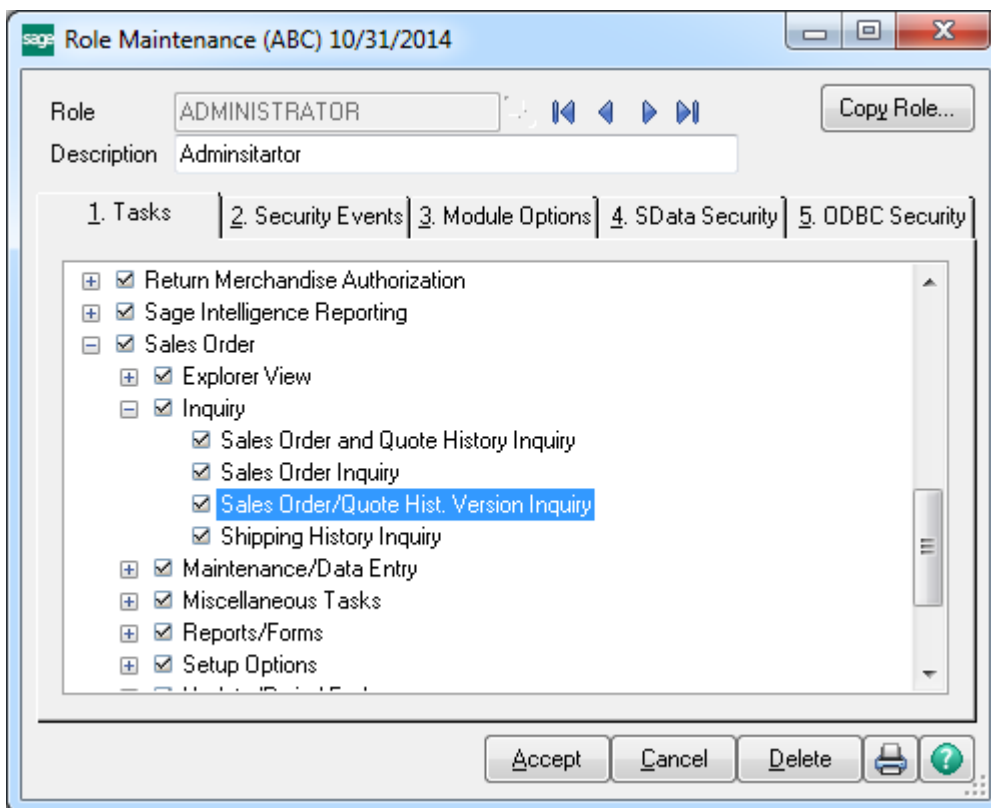
ODBC Security

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.

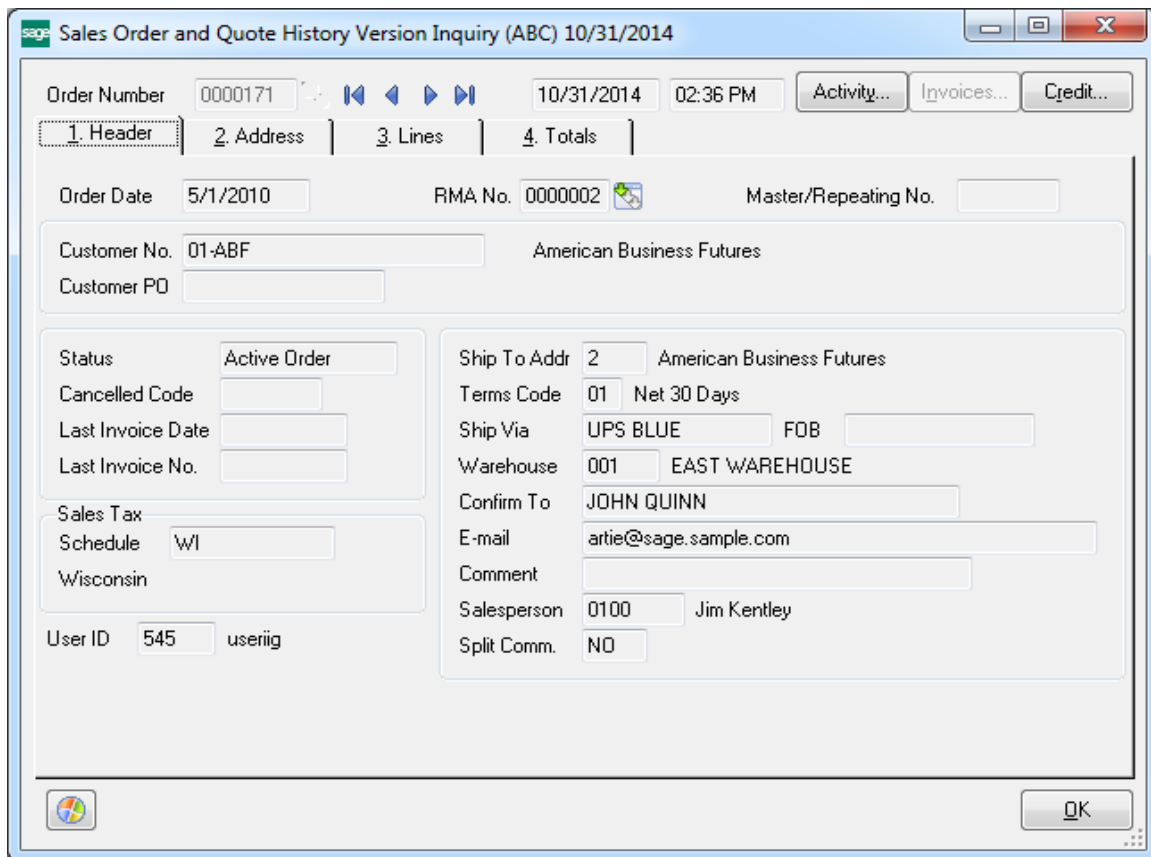


Introduction

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.



Sage Sales Order and Quote History Version Inquiry (ABC) 10/31/2014

Order Number 0000171 10/31/2014 02:36 PM Activity... Invoices... Credit...

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

Order Date 5/1/2010 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

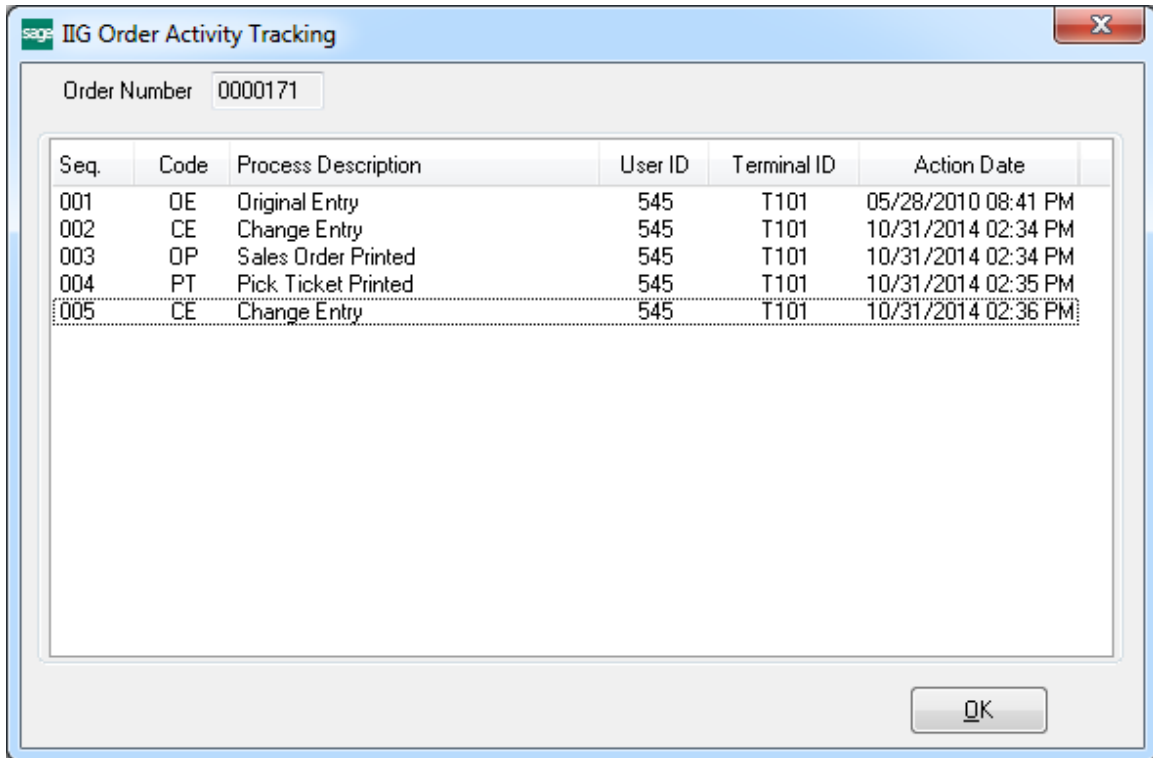
Sales Tax
Schedule WI
Wisconsin

User ID 545 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.

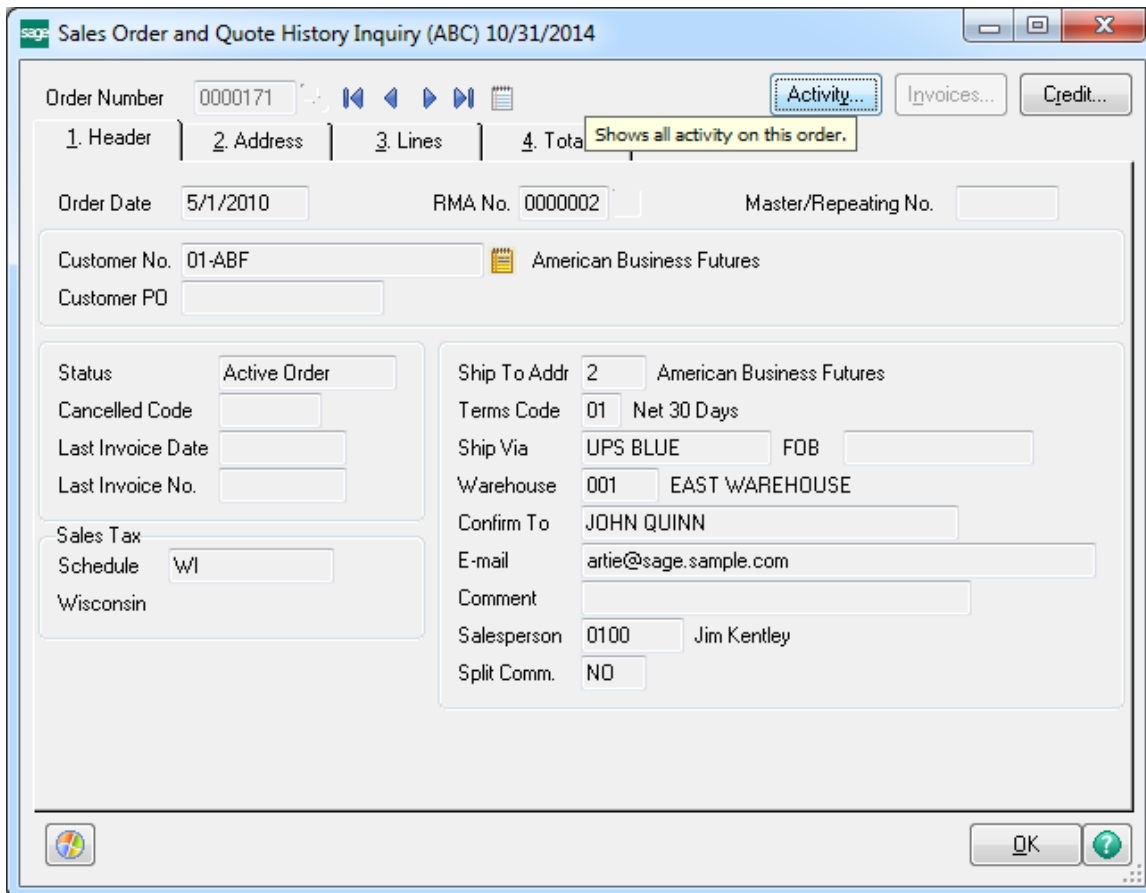


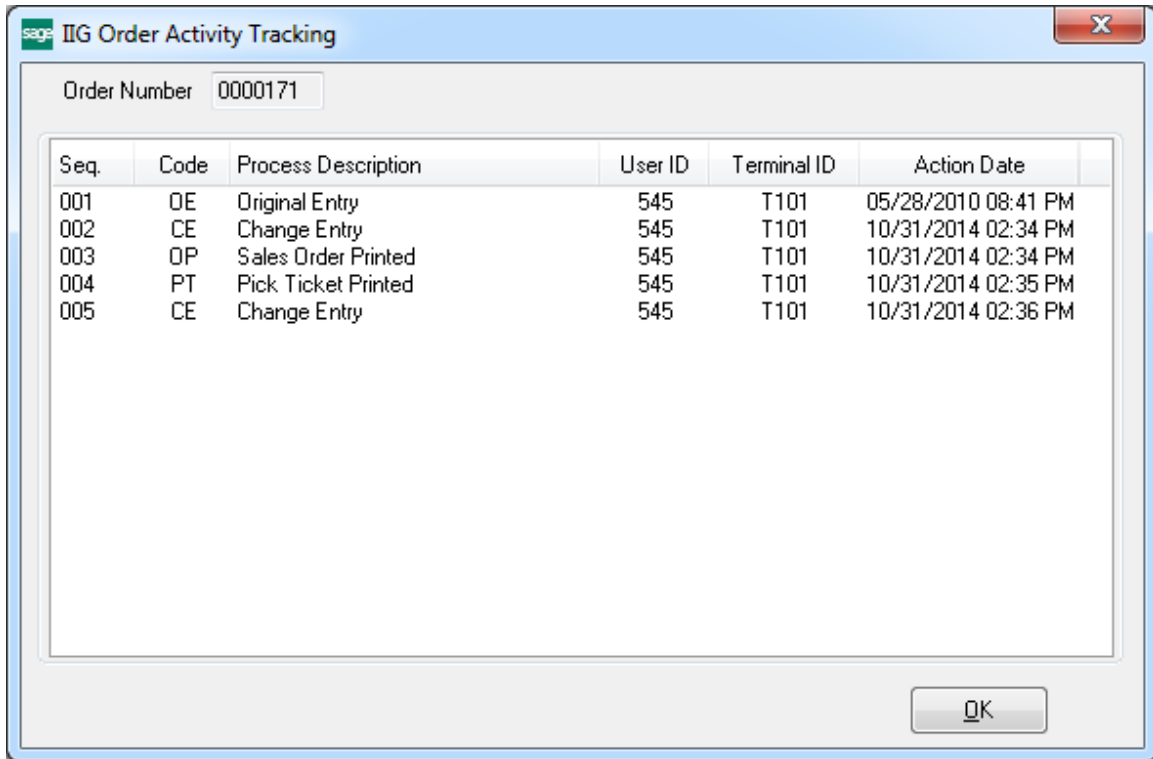
The screenshot shows a software window titled "sage IIG Order Activity Tracking". At the top, there is a text field for "Order Number" containing the value "0000171". Below this is a table with the following columns: "Seq.", "Code", "Process Description", "User ID", "Terminal ID", and "Action Date". The table contains five rows of activity logs. The last row, with sequence number 005, is highlighted with a dotted border. 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	545	T101	05/28/2010 08:41 PM
002	CE	Change Entry	545	T101	10/31/2014 02:34 PM
003	QP	Sales Order Printed	545	T101	10/31/2014 02:34 PM
004	PT	Pick Ticket Printed	545	T101	10/31/2014 02:35 PM
005	CE	Change Entry	545	T101	10/31/2014 02:36 PM

Sales Order/Quote History Inquiry

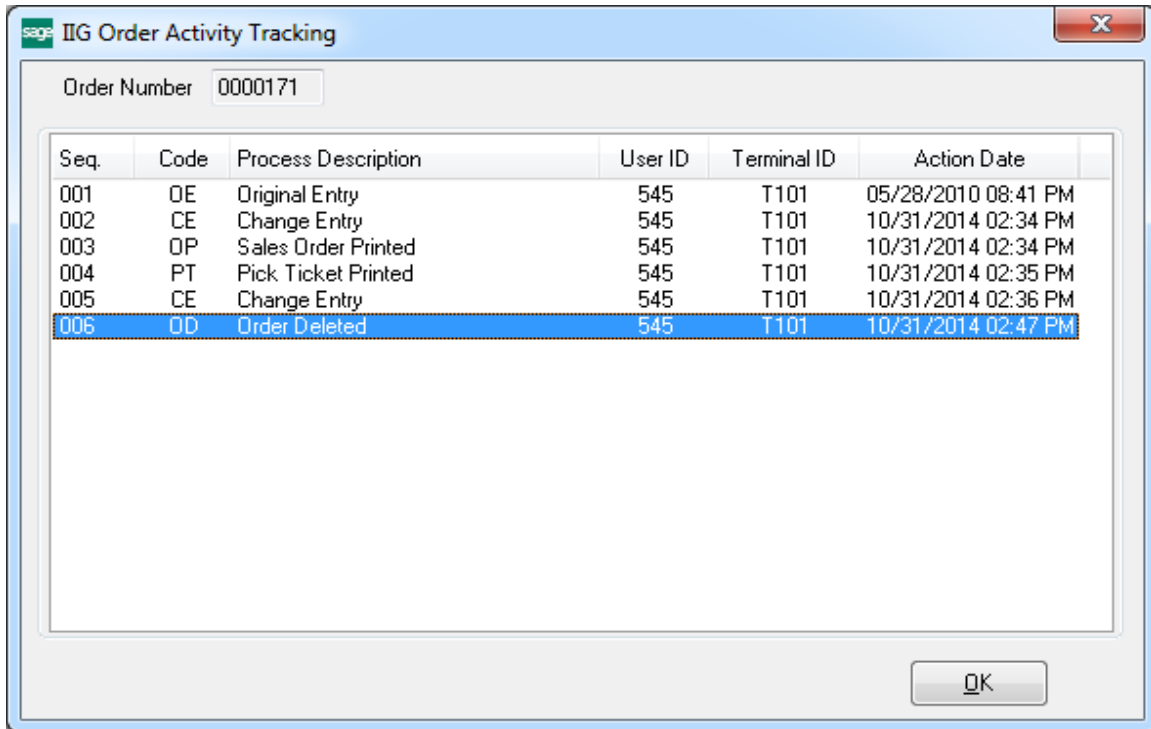
The **Activity** button has been added to the **Sales Order/Quote History Inquiry** screen to allow viewing all the activity on the selected order: change, printing, invoicing, etc.



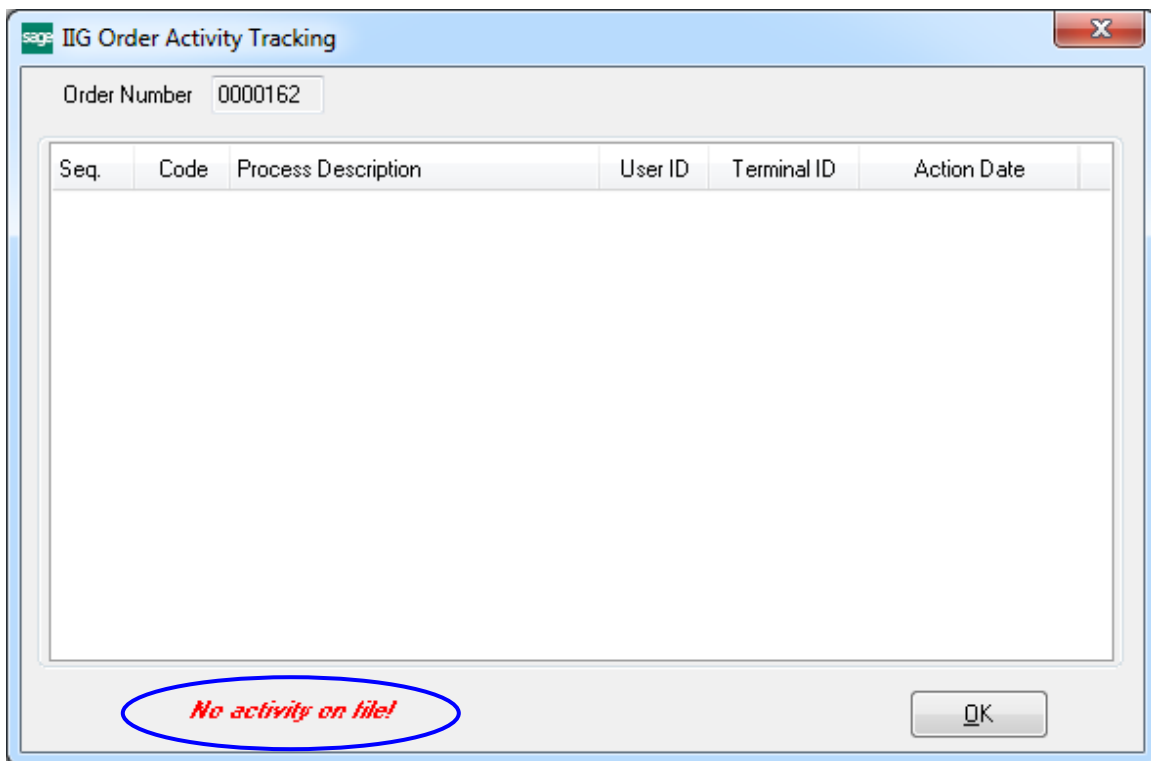


Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	545	T101	05/28/2010 08:41 PM
002	CE	Change Entry	545	T101	10/31/2014 02:34 PM
003	OP	Sales Order Printed	545	T101	10/31/2014 02:34 PM
004	PT	Pick Ticket Printed	545	T101	10/31/2014 02:35 PM
005	CE	Change Entry	545	T101	10/31/2014 02:36 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) 10/31/2014

Invoice No. 0100055 Type C/M Date 5/10/2010 Current... Tax Detail...
 Source S/O Order No. 0000170 Split Comm... Shipping ...

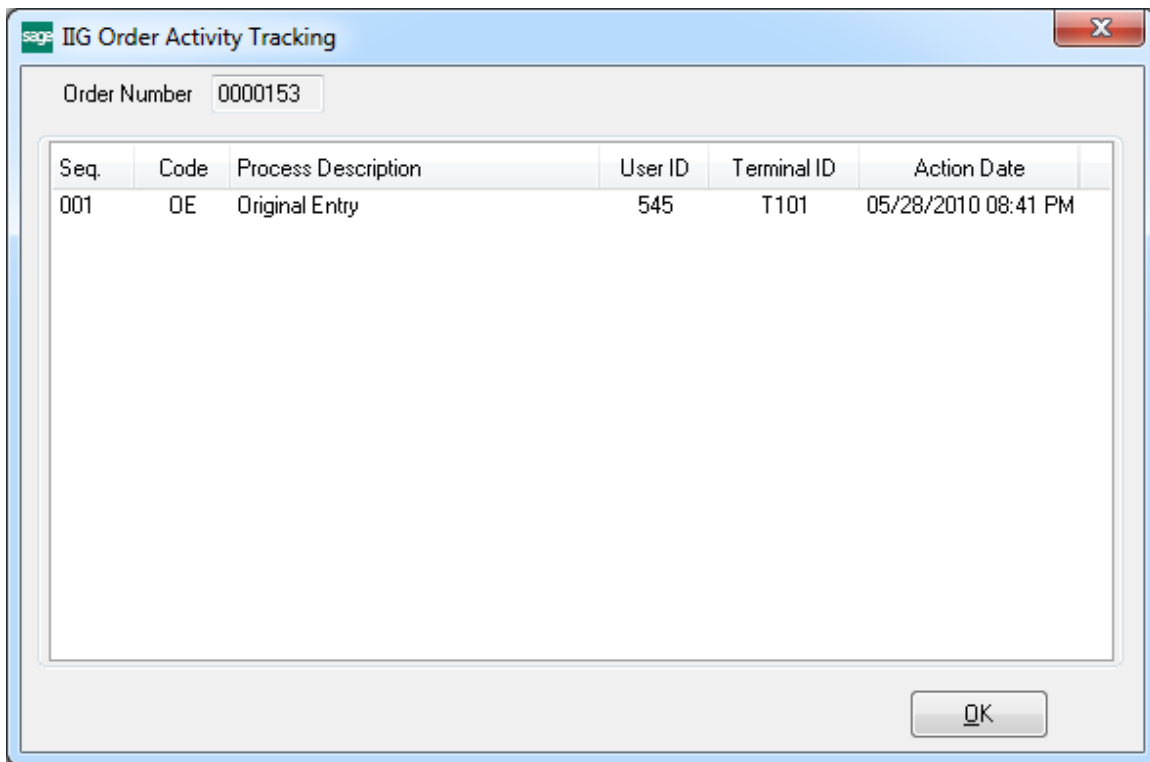
1. Main 2. Lines

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	5/10/2010	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.



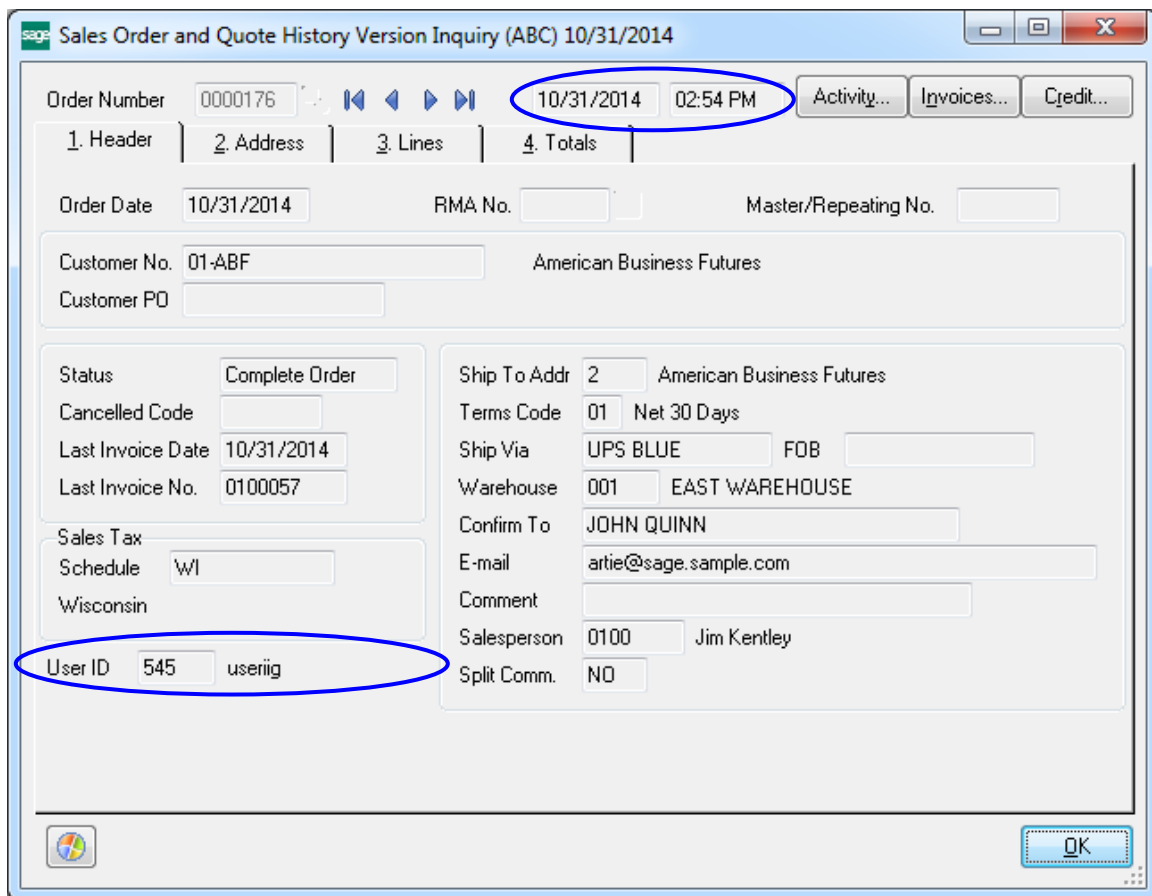
Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	545	T101	05/28/2010 08:41 PM

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

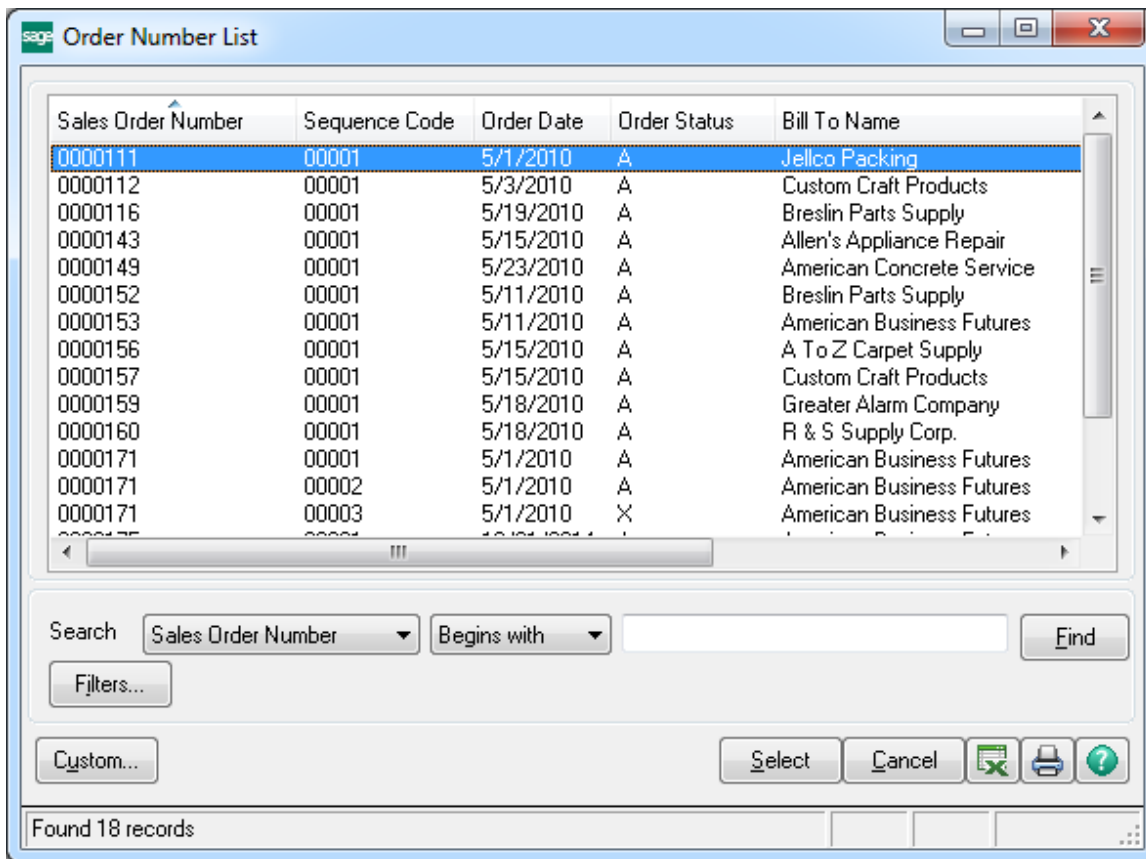
The **Order/Quote Hist. Version Inquiry** program has been added under the **Sales Order Inquires** menu to allow recording changes made to Sales Order (except printing).

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.



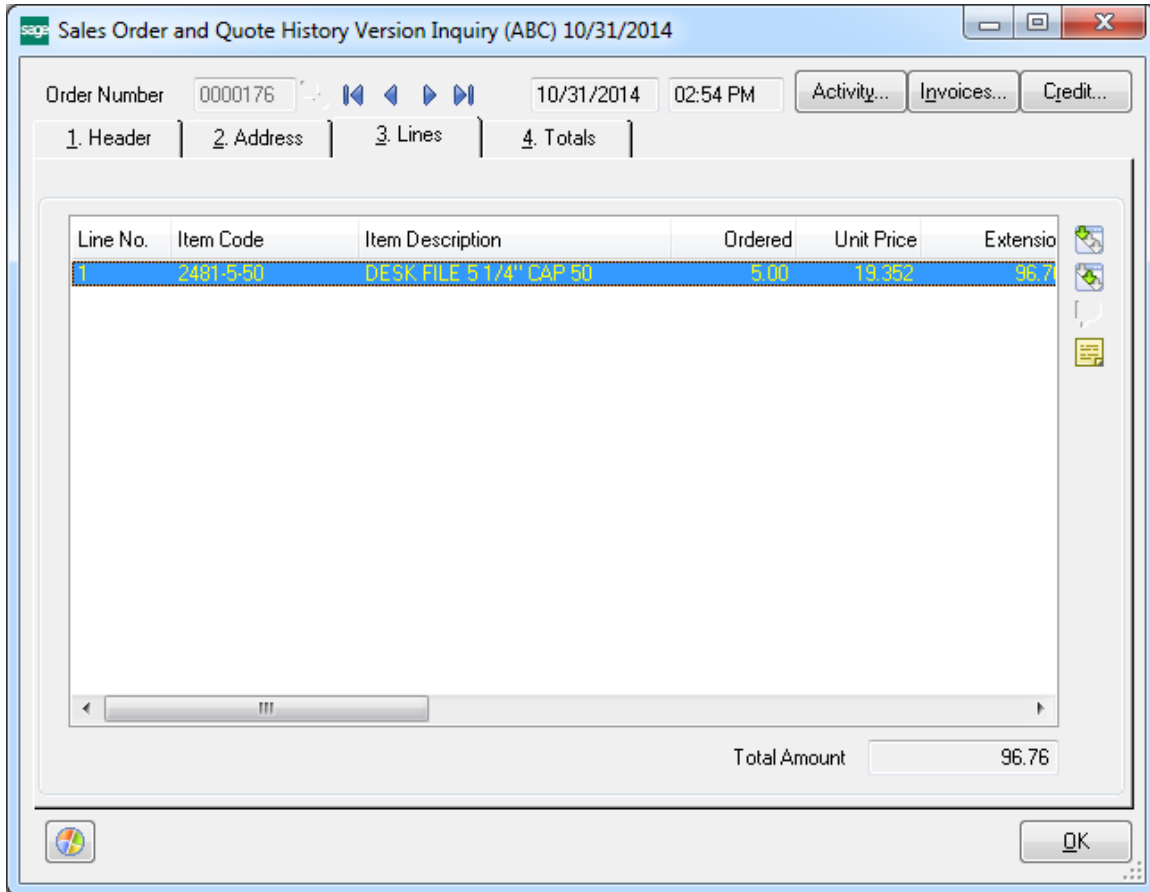
The changed Sales Orders themselves can be seen on the **Sales Order/Quote History Version Inquiry** screen, too. All changed Orders have the same **Sales Order Number** but different **Sequence Codes**.

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



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 close button in the top right corner. Below the title bar, there is a text field for "Order Number" containing the value "0000176". The main area of the window contains a table with the following data:

Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	545	T101	10/31/2014 02:53 PM
002	OP	Sales Order Printed	545	T101	10/31/2014 02:53 PM
003	PT	Pick Ticket Printed	545	T101	10/31/2014 02:53 PM
004	OP	Sales Order Printed	545	T101	10/31/2014 02:53 PM
005	IN	Invoiced Through Invoice Entry	545	T101	10/31/2014 02:54 PM
006	IP	Invoice Printed	545	T101	10/31/2014 02:54 PM
007	IU	Invoice Update	545	T101	10/31/2014 02:54 PM

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

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	

Microsoft XPS Document Writer

Keep Window Open After:

- Print:
- Preview:

Buttons: Print, Preview, Setup

Here is an example of the printout:

IIG Order Process Tracking Report

ABC Distribution and Service Corp. (ABC)
Excluding invoiced orde

ORDER		CUSTOMER				
Seq	Date	Time	Action	User	Terminal ID	
0000103		02-ORANGE		Orange Door & Window Co.		
001	10/31/2014	02:49 PM	Original Entry	545	T101	
002	10/31/2014	02:49 PM	Sales Order Printed	545	T101	
Total transactions for order				0000103		2
0000111		02-JELLCO		Jelco Packing		
001	5/28/2010	08:41 PM	Original Entry	545	T101	
Total transactions for order				0000111		1
0000112		02-CUSTOM		Custom Craft Products		
001	5/28/2010	08:41 PM	Original Entry	545	T101	
Total transactions for order				0000112		1
0000115		01-ABF		American Business Futures		
001	10/31/2014	02:49 PM	Original Entry	545	T101	
002	10/31/2014	02:49 PM	Sales Order Printed	545	T101	
003	10/31/2014	02:49 PM	Pick Ticket Printed	545	T101	
Total transactions for order				0000115		3

Current Page No.: 1 Total Page No.: 1+ Zoom Factor: 100%