Order Process Tracking
For Sage 100 ERP 2013

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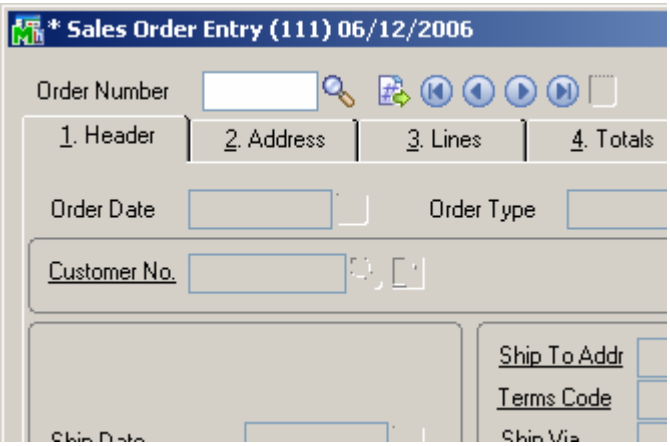
Installation Instructions and Cautions

***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.

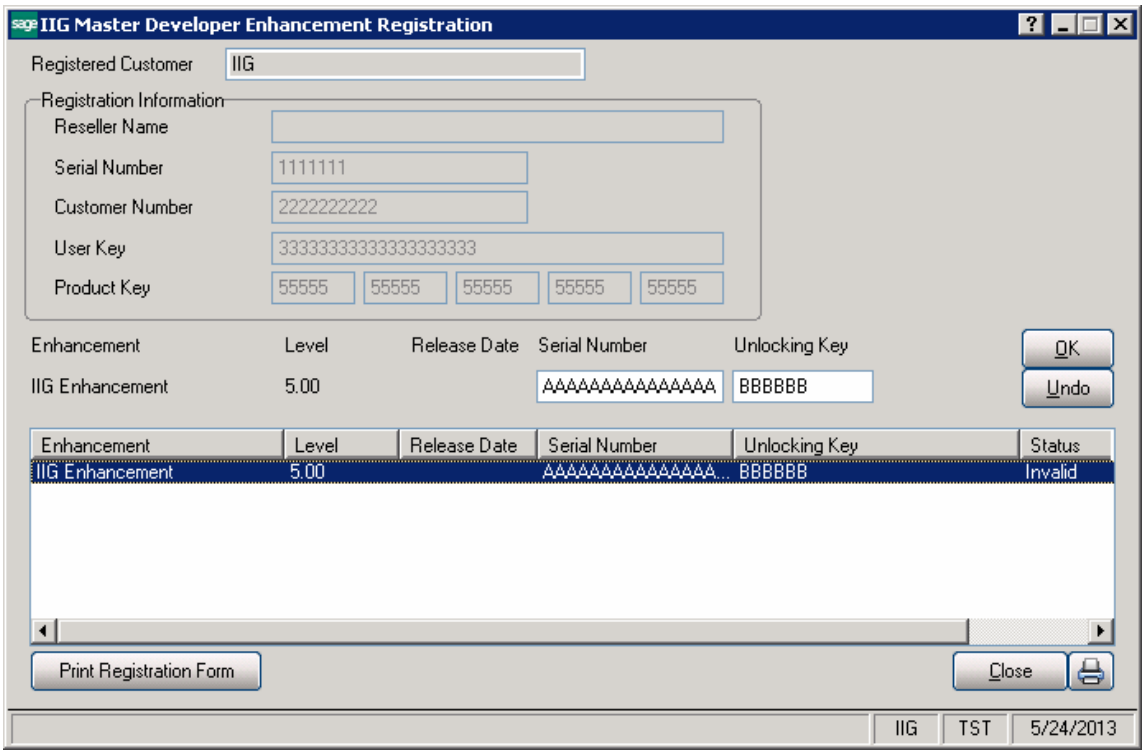
Follow all the instructions on this page before you run **Customizer Update**!

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 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**.



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.

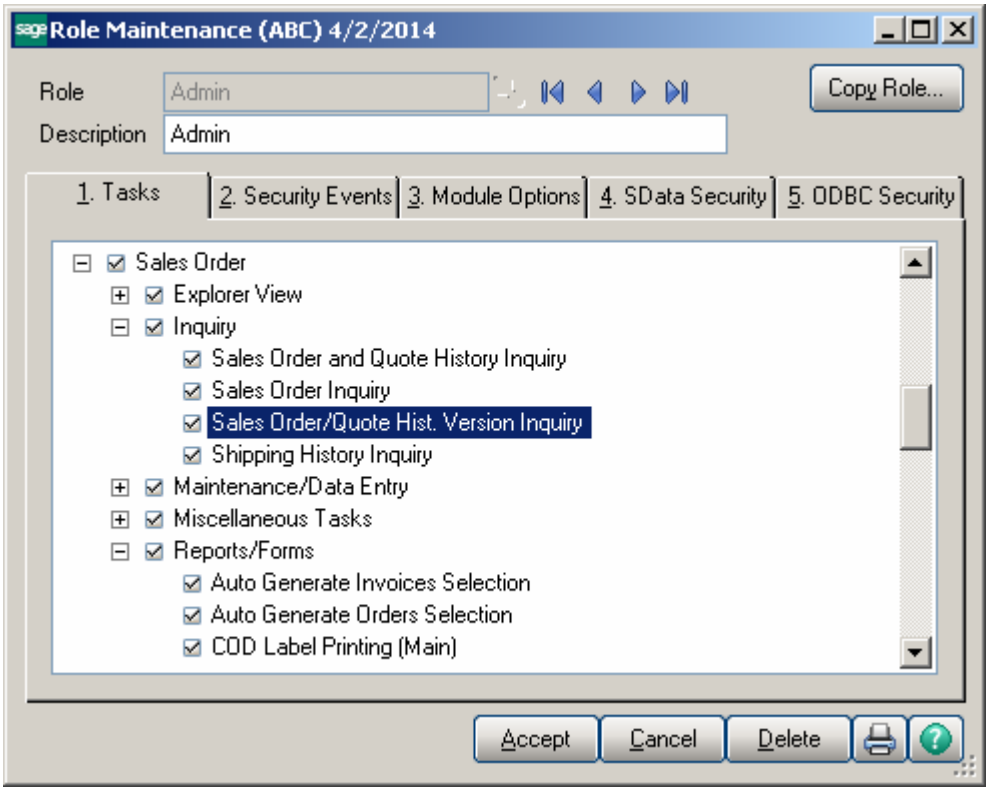
Use the **Print Registration Form** button to print IIG Registration Form.

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.

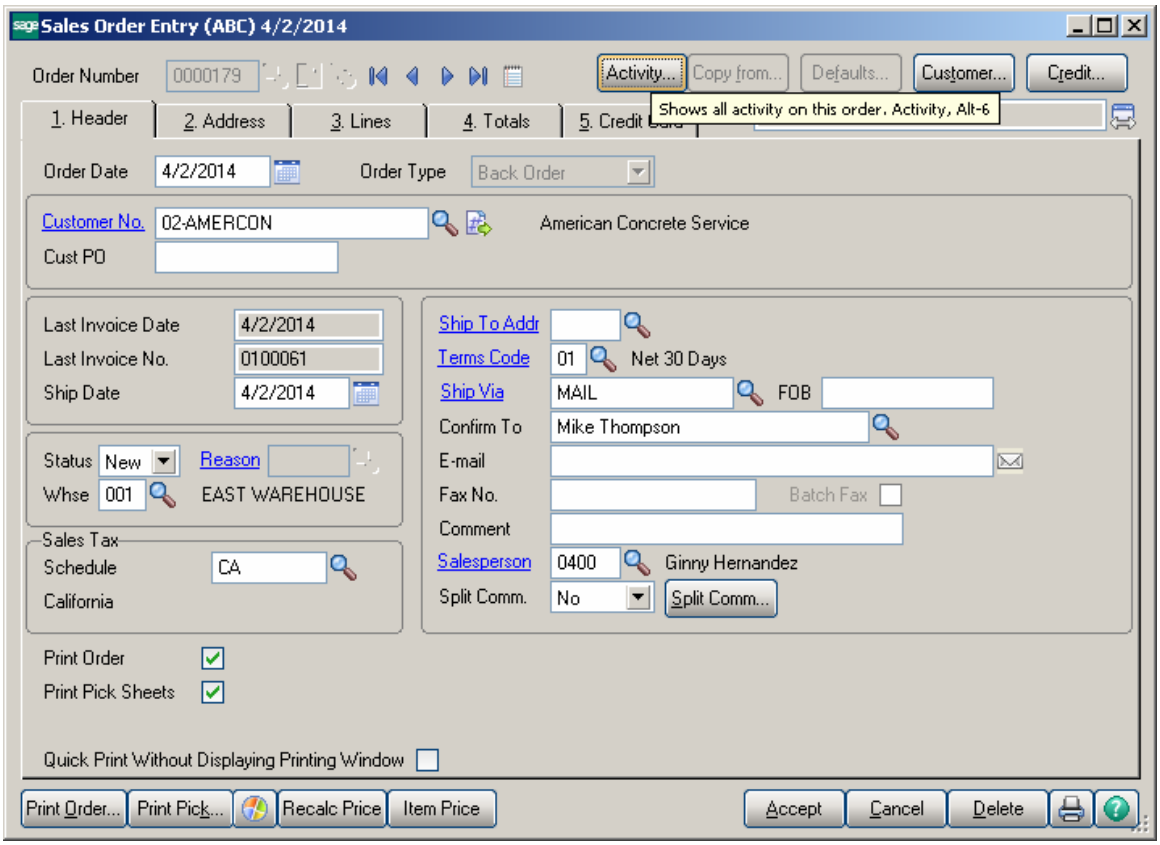


Introduction

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.

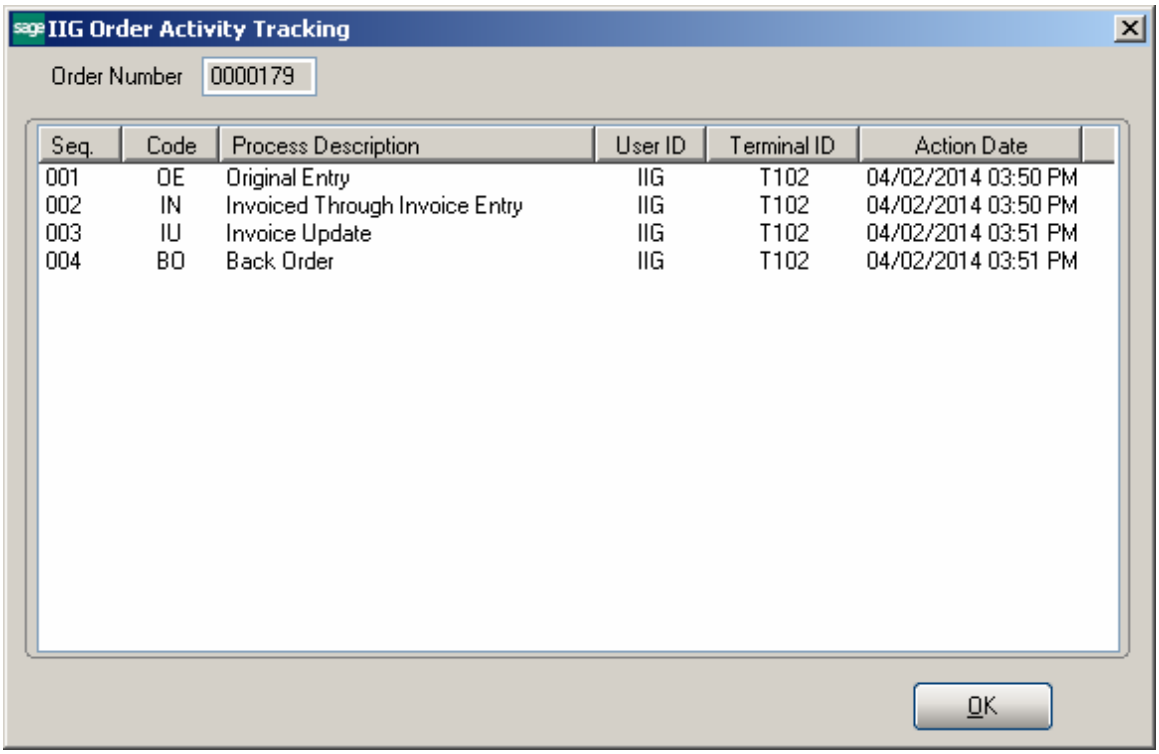
Sales Order Entry

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



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

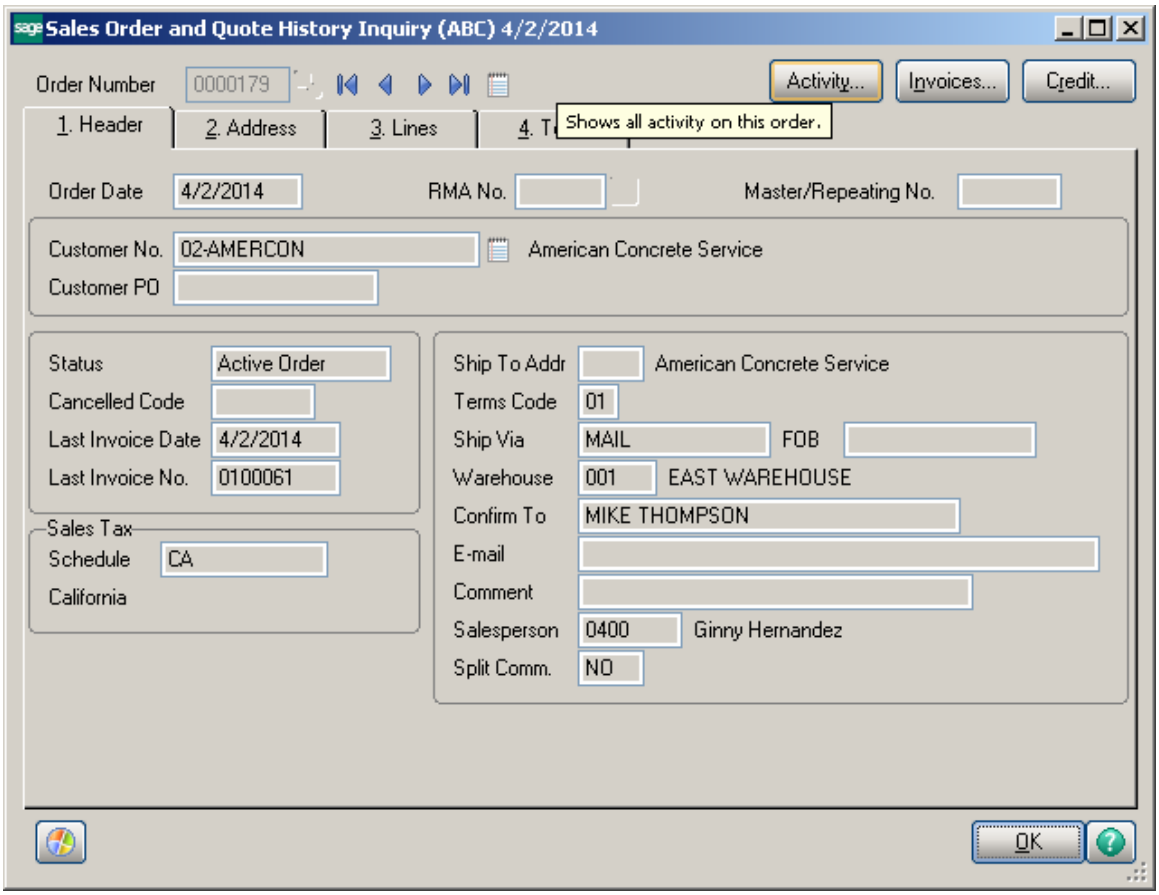
All the activity with the selected order and corresponding invoice, shipping entry is logged.

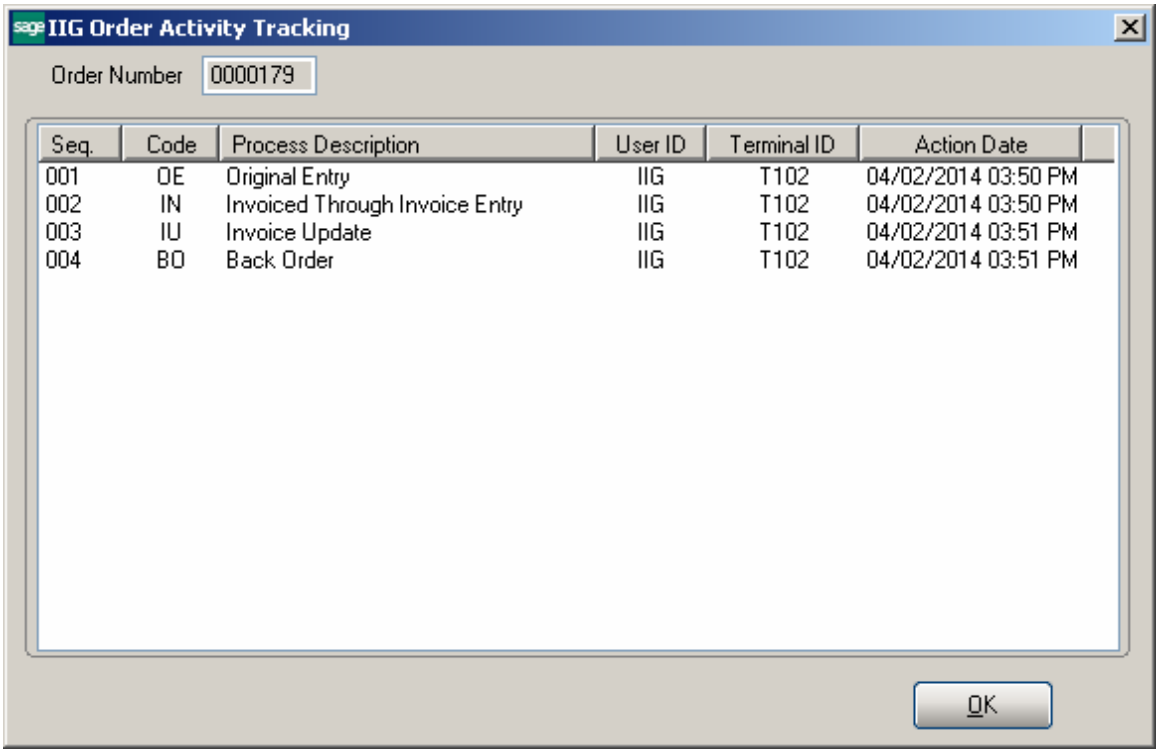


Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	IIG	T102	04/02/2014 03:50 PM
002	IN	Invoiced Through Invoice Entry	IIG	T102	04/02/2014 03:50 PM
003	IU	Invoice Update	IIG	T102	04/02/2014 03:51 PM
004	BO	Back Order	IIG	T102	04/02/2014 03:51 PM

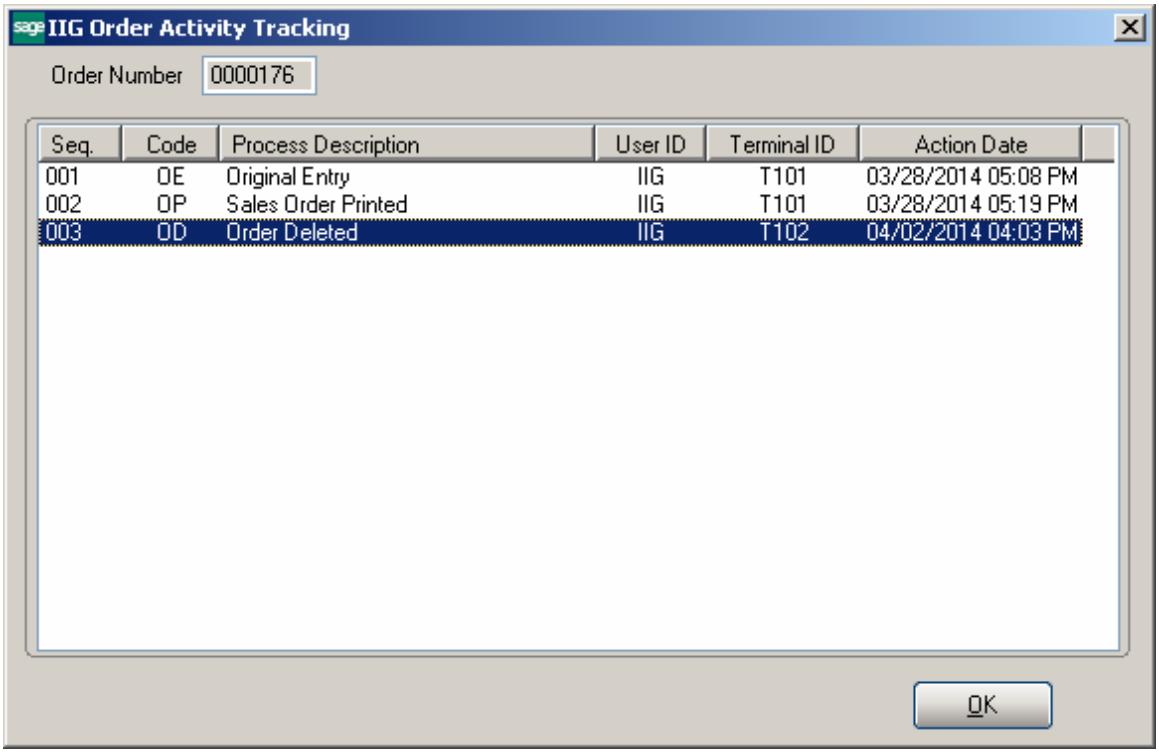
Sales Order/Quote History Inquiry

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.

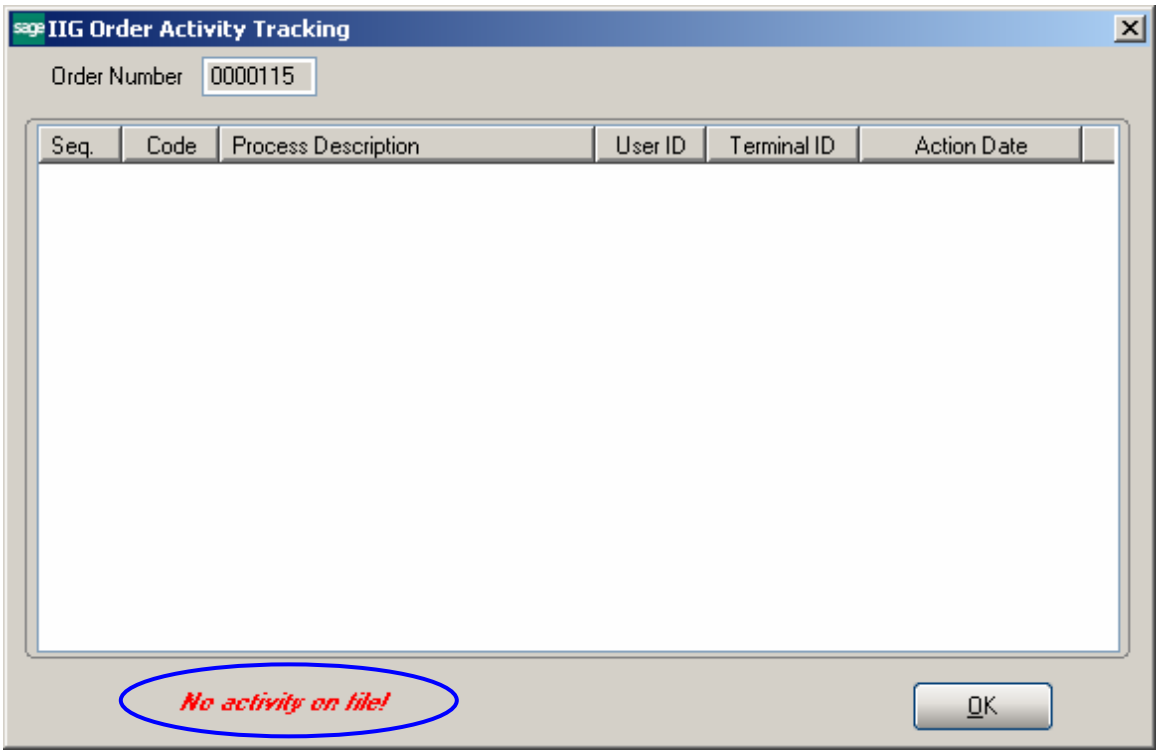




From the **History Inquiry** screen, the Activity Tracking can be viewed for the deleted orders, too. When deleting, you should save the order in the history, to be able to view it in the Inquiry. The deletion of the order is also logged.



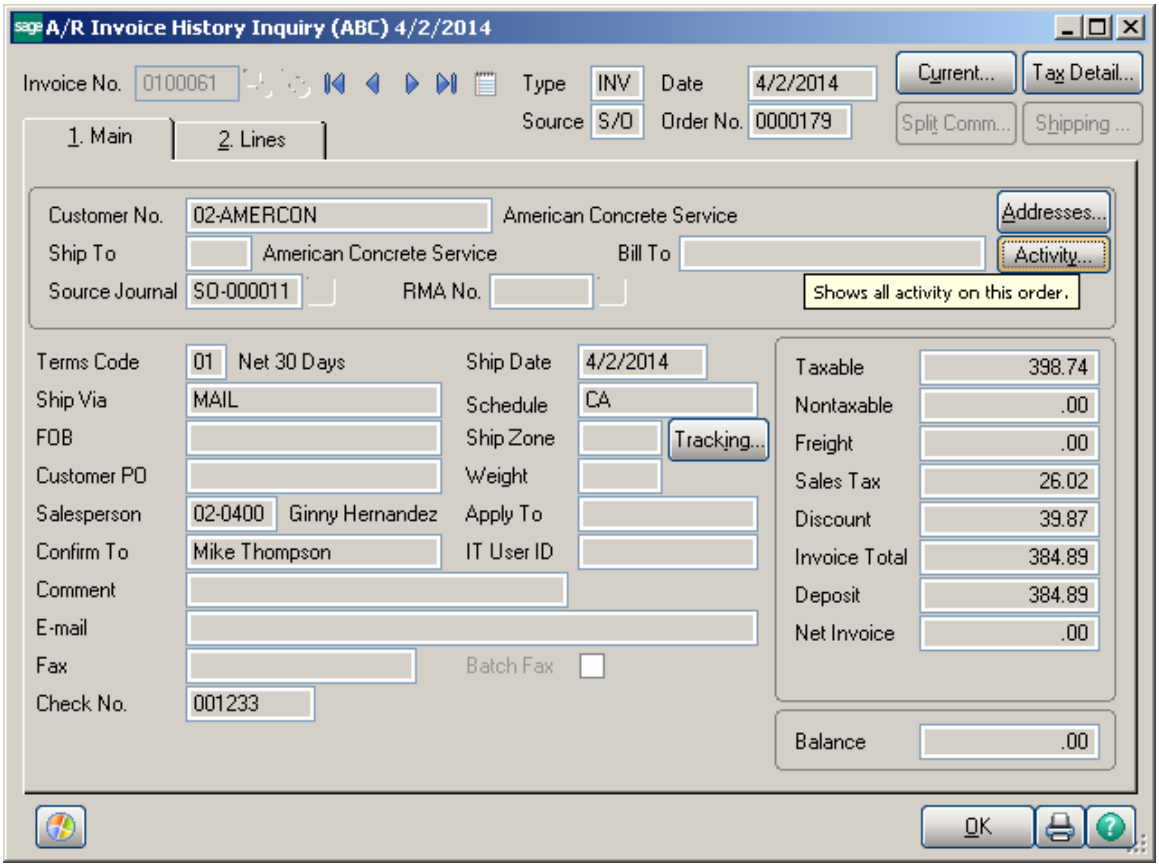
For the orders processed prior to the **Order Process Tracking** enhancement installation, the following message is displayed on the screen:



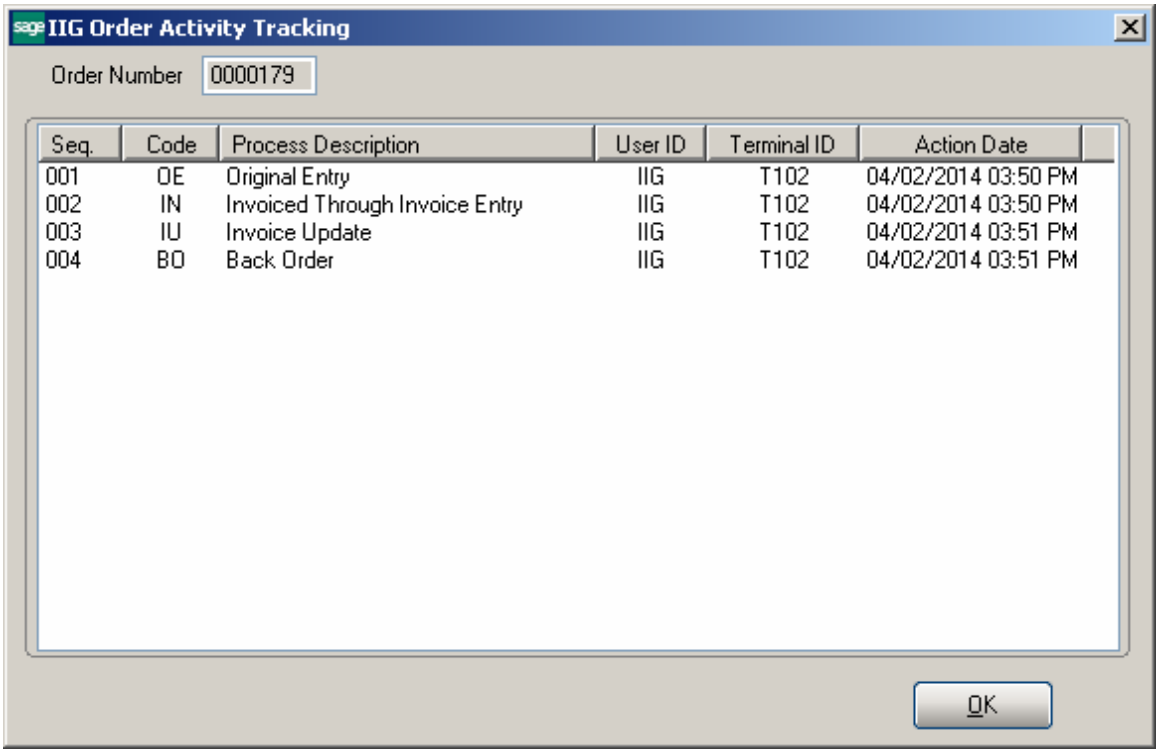
When running the **Purge Order/Quote History** program to remove sales order and quote history records, which order dates are on or before the date entered, the **Order Activity Tracking** information is deleted as well.

Invoice History Inquiry

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



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	IIG	T102	04/02/2014 03:50 PM
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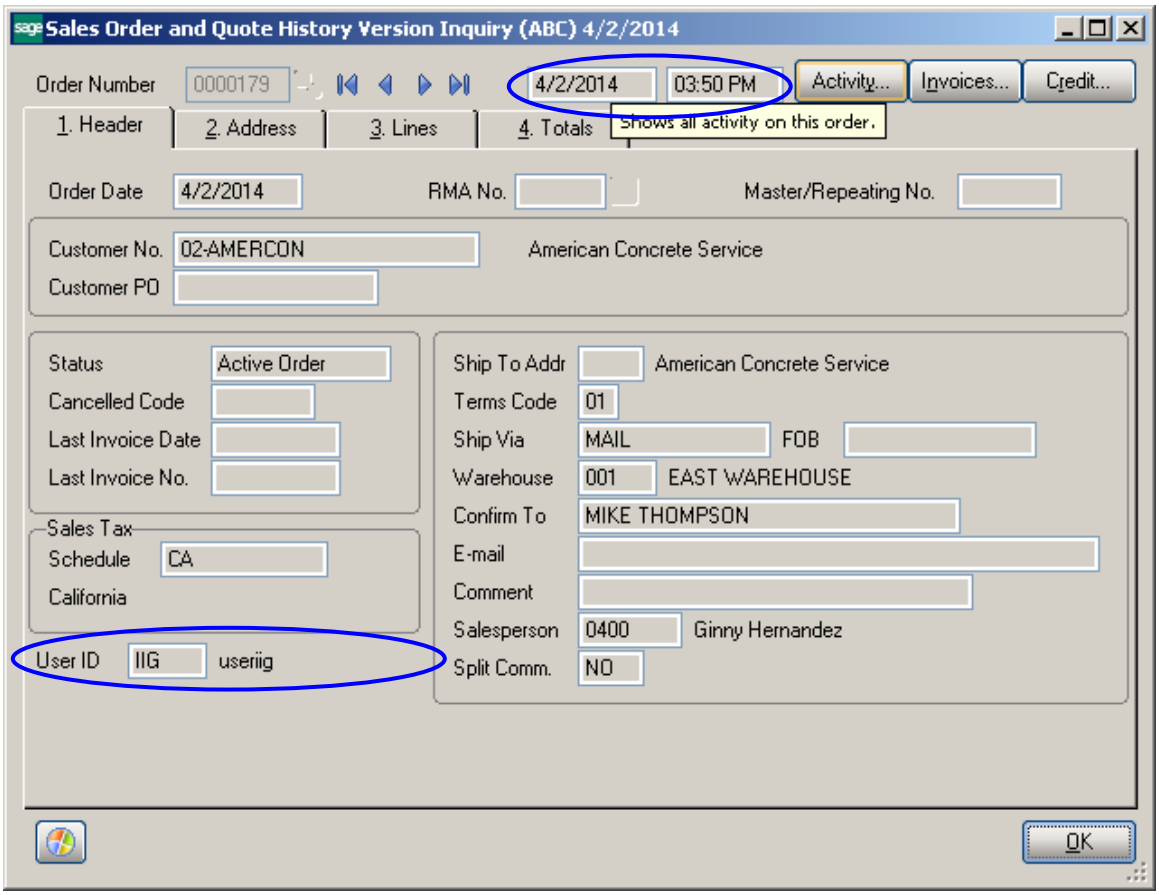
003	IU	Invoice Update	IIG	T102	04/02/2014 03:51 PM
004	BO	Back Order	IIG	T102	04/02/2014 03:51 PM

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

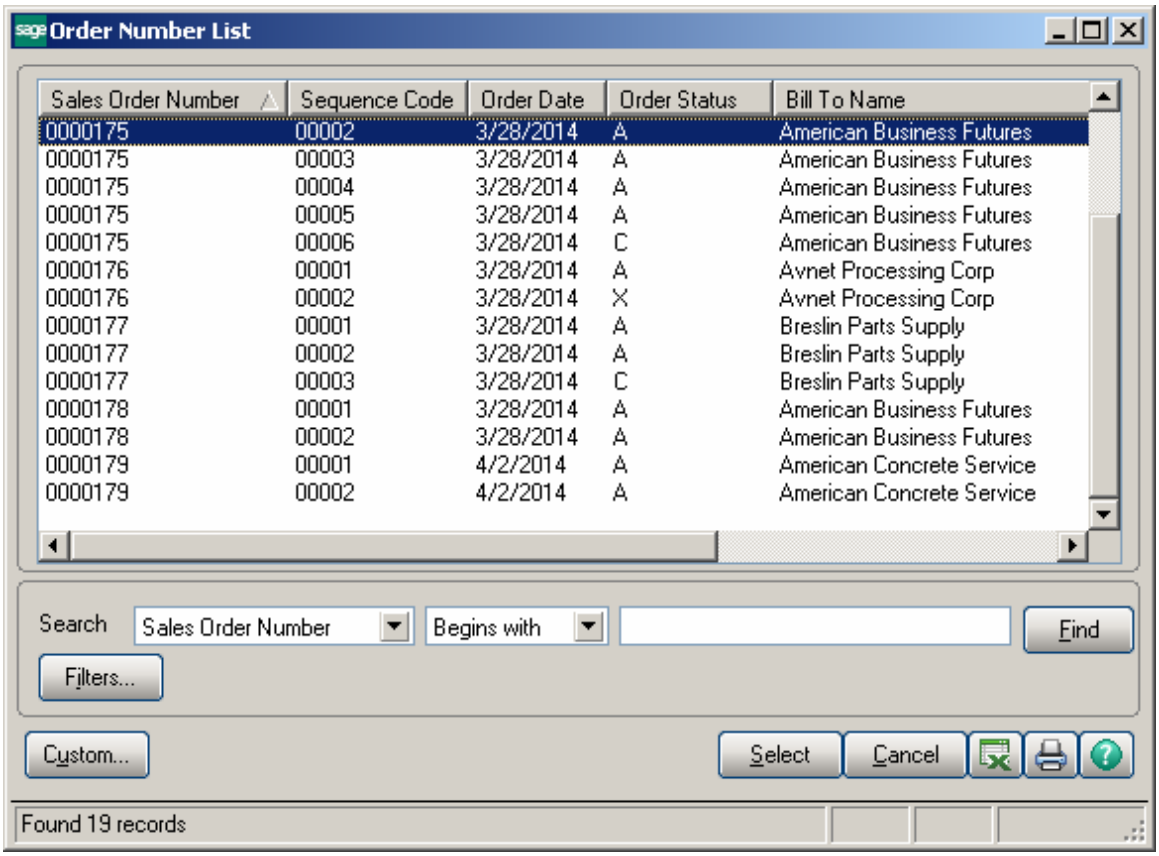
The **Order/Quote Hist. Version Inquiry** program has been added under the **Sales Order Inquires** menu to allow recording changes made to Sales Order (except printing).

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.



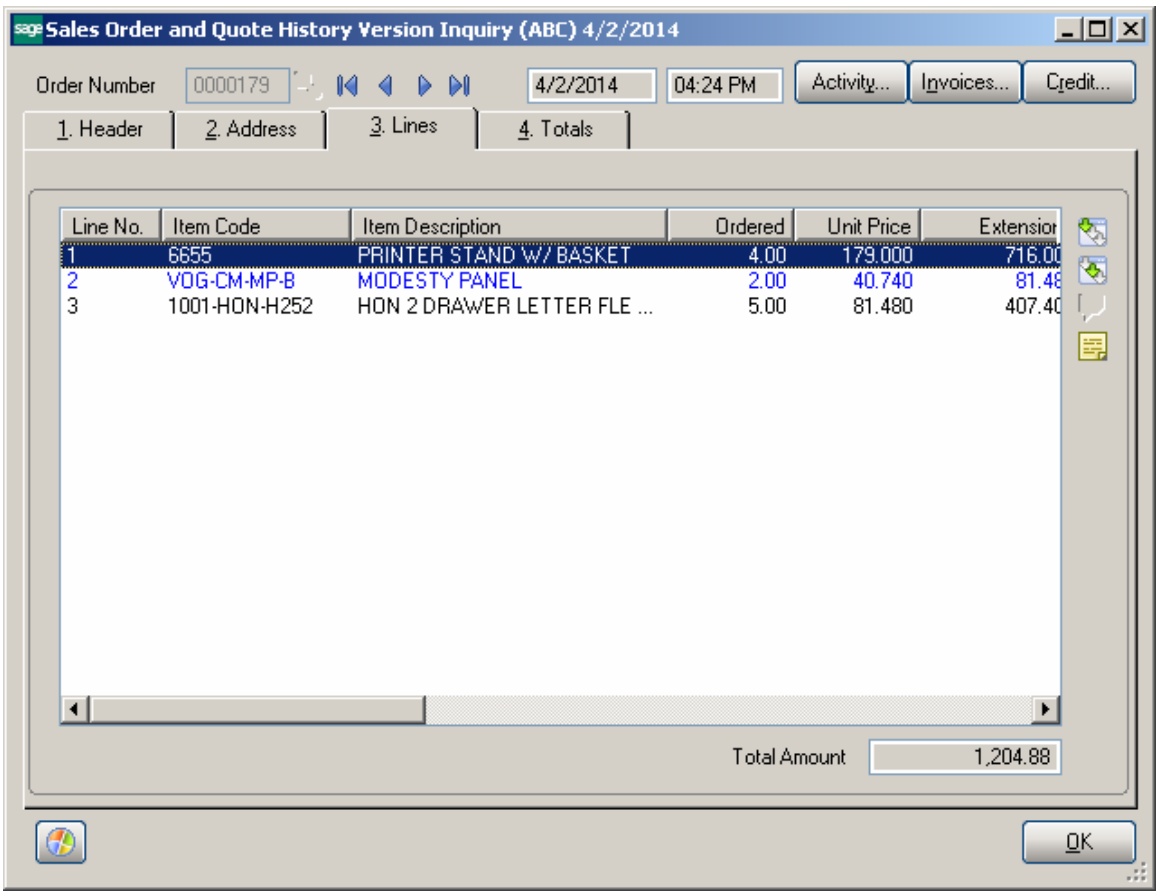
The changed Sales Orders themselves can be seen on the **Sales Order/Quote History Version Inquiry** screen, too. All changed Orders have the same **Sales Order Number** but different **Sequence Codes**.

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



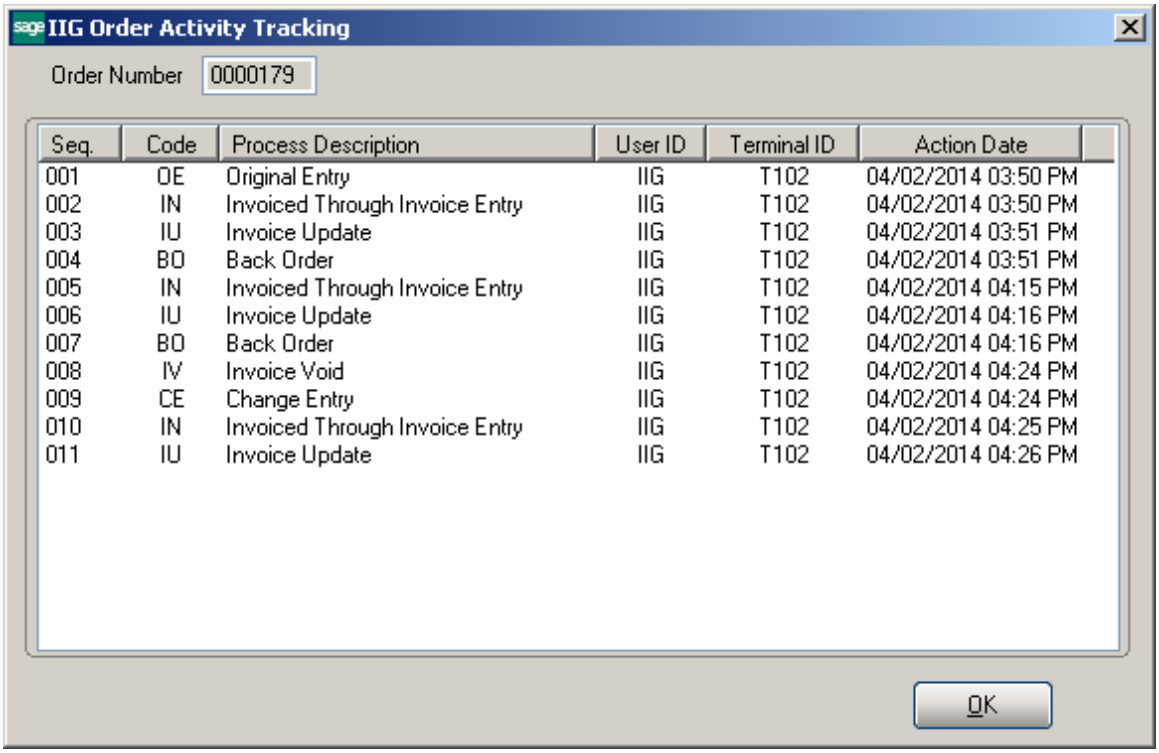
The **Sales Order/Quote History Version Inquiry** program records also the newly created Sales Orders, including Back Orders being generated during invoice update.

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).



Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	IIG	T102	04/02/2014 03:50 PM
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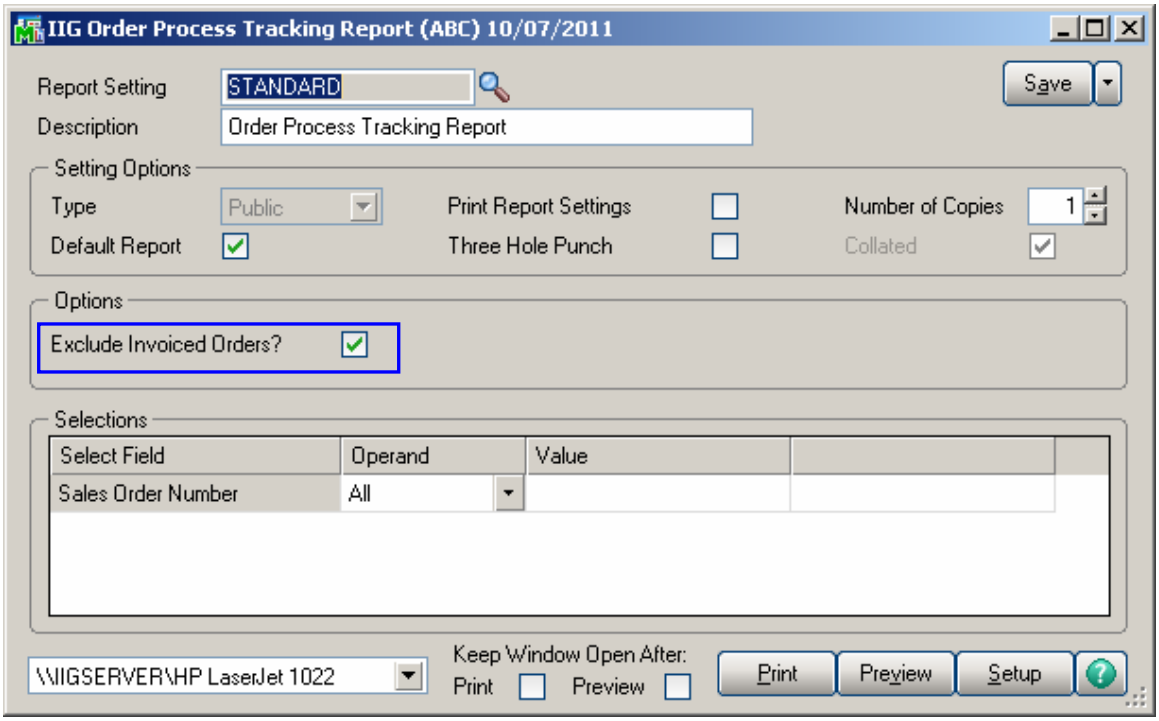
004	BO	Back Order	IIG	T102	04/02/2014 03:51 PM
005	IN	Invoiced Through Invoice Entry	IIG	T102	04/02/2014 04:15 PM
006	IU	Invoice Update	IIG	T102	04/02/2014 04:16 PM
007	BO	Back Order	IIG	T102	04/02/2014 04:16 PM
008	IV	Invoice Void	IIG	T102	04/02/2014 04:24 PM
009	CE	Change Entry	IIG	T102	04/02/2014 04:24 PM
010	IN	Invoiced Through Invoice Entry	IIG	T102	04/02/2014 04:25 PM
011	IU	Invoice Update	IIG	T102	04/02/2014 04:26 PM

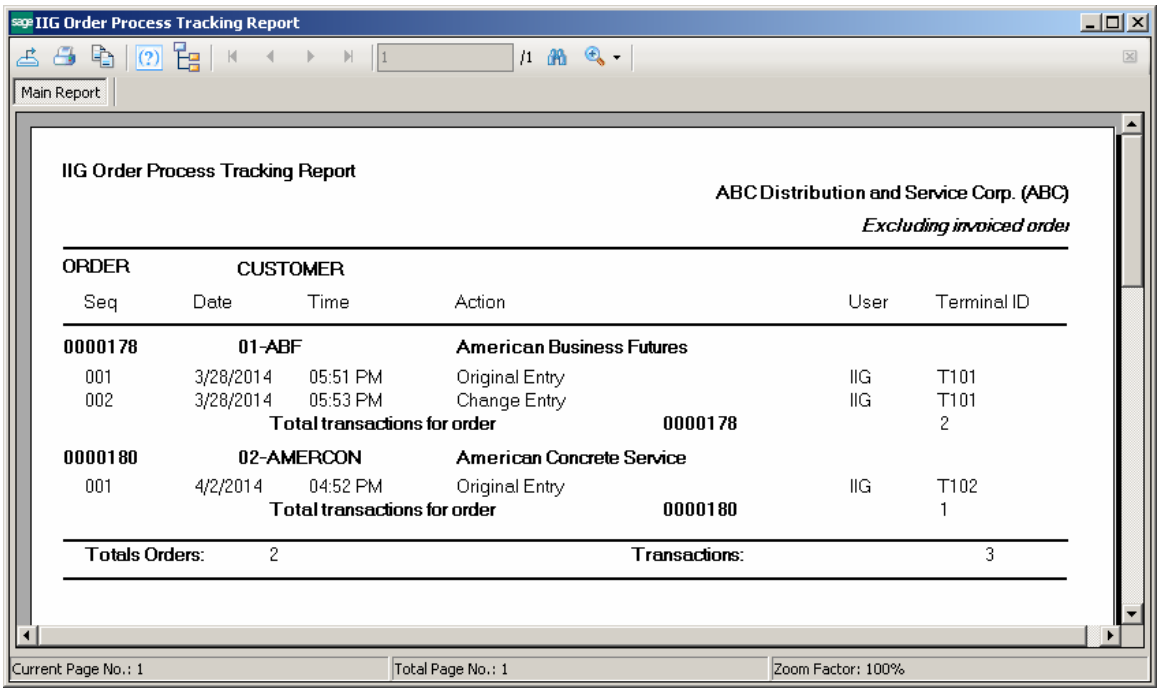
IIG Order Process Tracking Report

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:



Here is an example of the printout:



IIG Order Process Tracking Report

ABC Distribution and Service Corp. (ABC)

Excluding invoiced order

ORDER Seq	CUSTOMER Date	Time	Action	User	Terminal ID
0000178	**01-ABF**		**American Business Futures**		
001	3/28/2014	05:51 PM	Original Entry	IIG	T101
002	3/28/2014	05:53 PM	Change Entry	IIG	T101
	Total transactions for order		**0000178**		2
0000180	**02-AMERCON**		**American Concrete Service**		
001	4/2/2014	04:52 PM	Original Entry	IIG	T102
	Total transactions for order		**0000180**		1

Totals Orders: 2 **Transactions:** 3

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