



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.

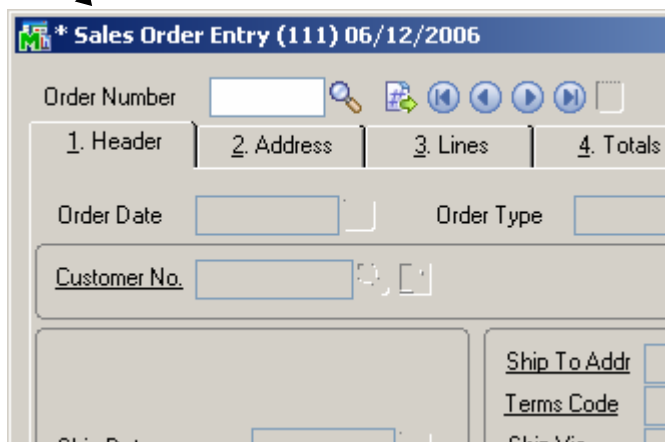
Wait! Before You Install – Do You Use CUSTOM OFFICE?

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**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key	Status
IIG Enhancement	5.00		AAAAAAAAAAAAAAAAAA	BBBBBB	Invalid

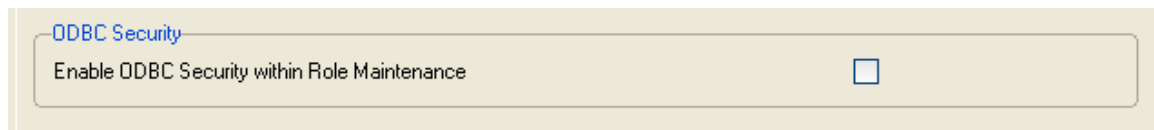
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

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.

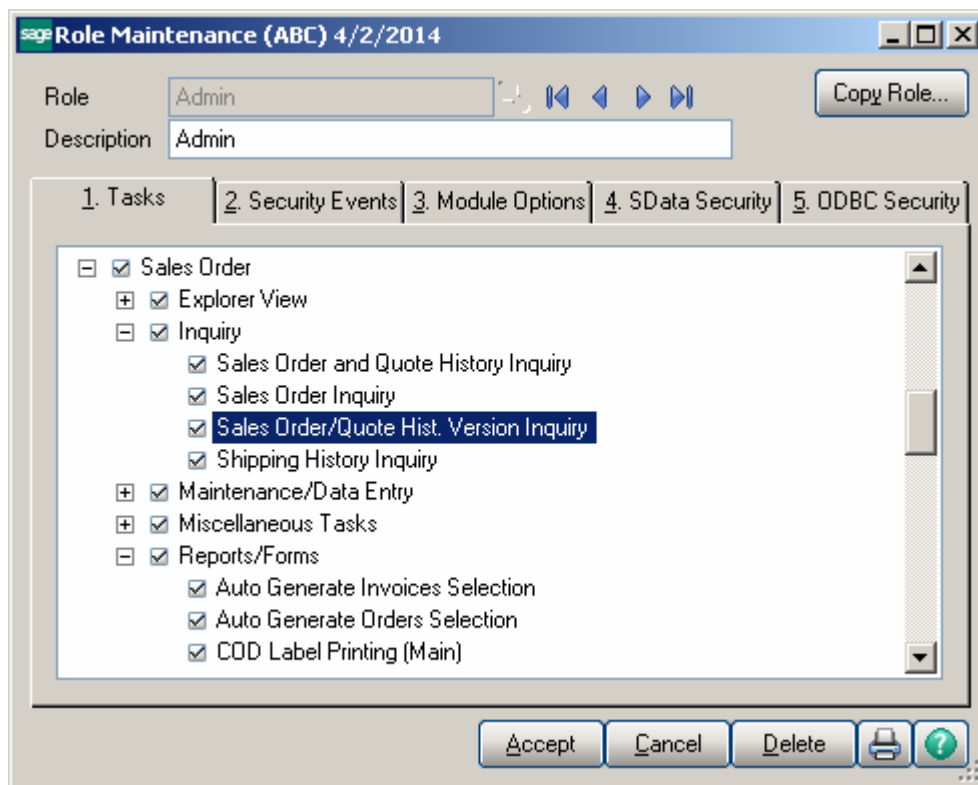
ODBC Security

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.

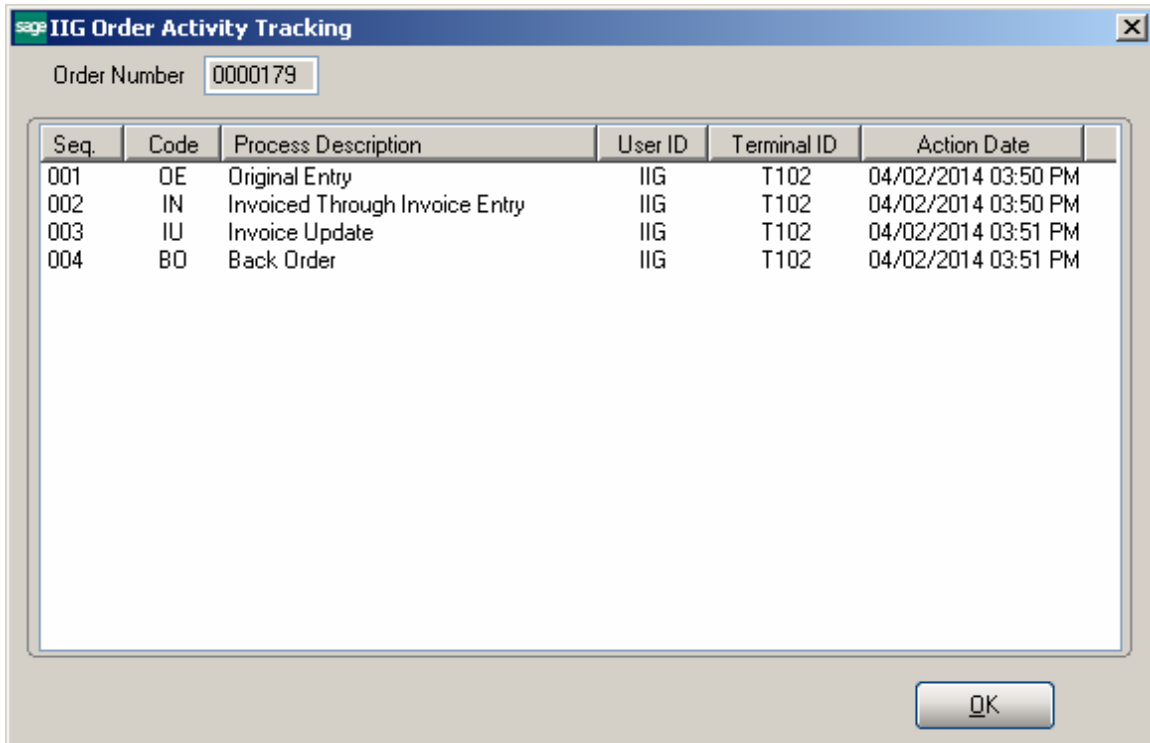
Sales Order Entry

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

The screenshot displays the 'Sales Order Entry (ABC) 4/2/2014' window. At the top, there's a title bar and a menu bar. Below the menu bar, there's a toolbar with buttons: 'Activity...', 'Copy from...', 'Defaults...', 'Customer...', and 'Credit...'. The 'Activity...' button is highlighted with a yellow box, and a tooltip above it reads 'Shows all activity on this order. Activity, Alt-6'. The main area of the window is divided into several sections. The top section contains 'Order Number' (0000179), 'Order Date' (4/2/2014), and 'Order Type' (Back Order). Below this, there's a 'Customer No.' field (02-AMERCON) and a 'Cust PO' field. The middle section contains 'Last Invoice Date' (4/2/2014), 'Last Invoice No.' (0100061), and 'Ship Date' (4/2/2014). To the right of these fields, there's a 'Ship To Addr' field, 'Terms Code' (01), 'Net 30 Days', 'Ship Via' (MAIL), 'FOB' (FOB), 'Confirm To' (Mike Thompson), 'E-mail', 'Fax No.', 'Batch Fax', 'Comment', 'Salesperson' (0400), 'Ginny Hernandez', and 'Split Comm.' (No). The bottom section contains 'Status' (New), 'Reason', 'Whse' (001), 'EAST WAREHOUSE', 'Sales Tax' (CA), 'California', 'Print Order' (checked), 'Print Pick Sheets' (checked), and 'Quick Print Without Displaying Printing Window' (unchecked). At the very bottom, there's a row of buttons: 'Print Order...', 'Print Pick...', 'Recalc Price', 'Item Price', 'Accept', 'Cancel', 'Delete', and a help icon.

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". Inside the window, there is a text field labeled "Order Number" containing the value "0000179". Below this is a table with the following data:

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

At the bottom right of the window 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) 4/2/2014

Order Number: 0000179

Buttons: Activity... Invoices... Credit...

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

Order Date: 4/2/2014 RMA No. Master/Repeating No.

Customer No. 02-AMERCON American Concrete Service

Customer PO

Status: Active Order

Cancelled Code

Last Invoice Date: 4/2/2014

Last Invoice No. 0100061

Sales Tax Schedule: CA California

Ship To Addr: American Concrete Service

Terms Code: 01

Ship Via: MAIL FOB

Warehouse: 001 EAST WAREHOUSE

Confirm To: MIKE THOMPSON

E-mail

Comment

Salesperson: 0400 Ginny Hernandez

Split Comm. NO

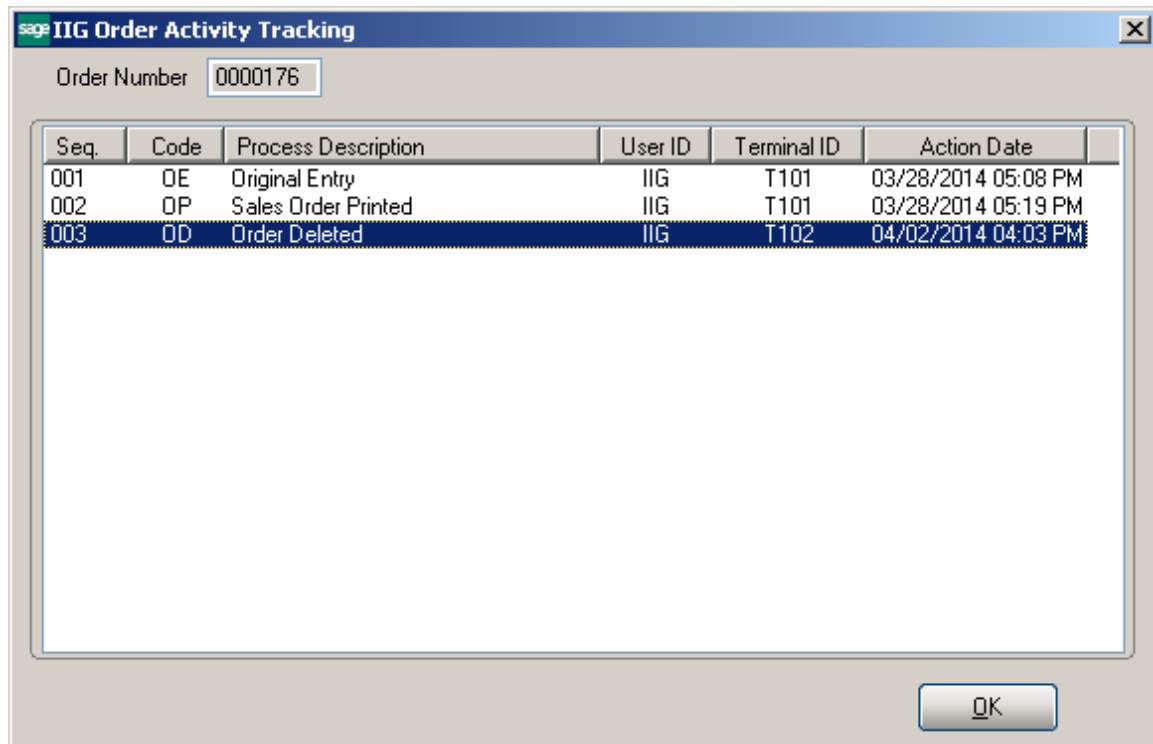
Buttons: OK ?

The screenshot shows a software window titled "sage IIG Order Activity Tracking". Inside the window, there is a text field labeled "Order Number" containing the value "0000179". Below this is a table with the following data:

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

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

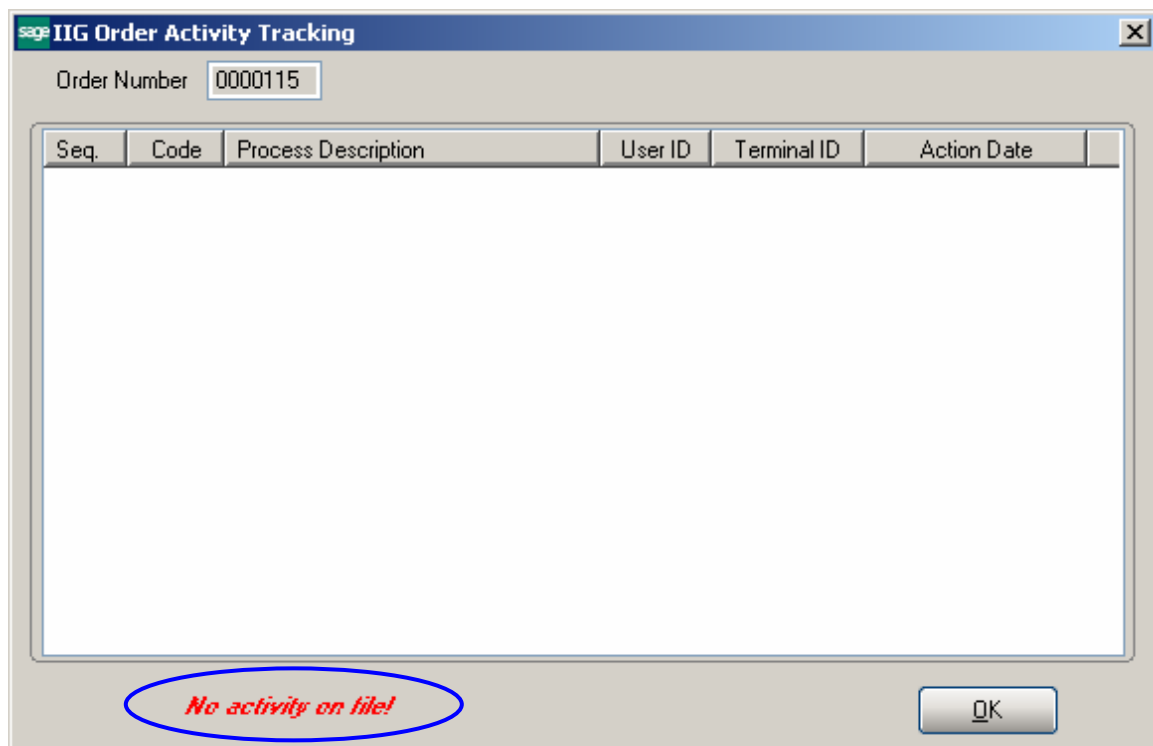
From the **History Inquiry** screen, the Activity Tracking can be viewed for the deleted orders, too. When deleting, you should save the order in the history, to be able to view it in the Inquiry. The deletion of the order is also logged.



Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	03/28/2014 05:08 PM
002	OP	Sales Order Printed	IIG	T101	03/28/2014 05:19 PM
003	OD	Order Deleted	IIG	T102	04/02/2014 04:03 PM

OK

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



Seq.	Code	Process Description	User ID	Terminal ID	Action Date
------	------	---------------------	---------	-------------	-------------

No activity on file!

OK

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) 4/2/2014

Invoice No. Type Date

Source Order No.

1. Main | 2. Lines

Customer No. American Concrete Service

Ship To Bill To

Source Journal RMA No.

Terms Code Net 30 Days Ship Date

Ship Via Schedule

FOB Ship Zone

Customer PO Weight

Salesperson Ginny Hernandez Apply To

Confirm To IT User ID

Comment

E-mail

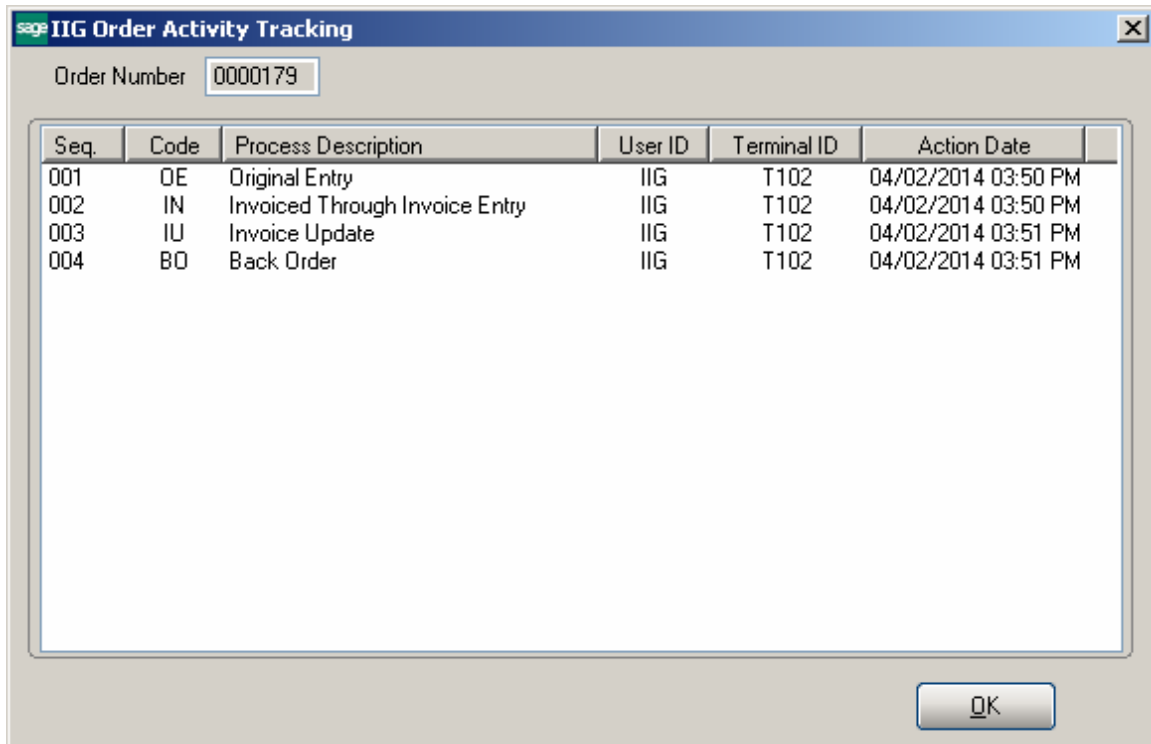
Fax Batch Fax ☐

Check No.

Taxable	398.74
Nontaxable	.00
Freight	.00
Sales Tax	26.02
Discount	39.87
Invoice Total	384.89
Deposit	384.89
Net Invoice	.00

Balance

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



The screenshot shows a software window titled "Sage IIG Order Activity Tracking". At the top, there is a text field labeled "Order Number" containing the value "0000179". Below this is a table with the following data:

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

At the bottom right of the window 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 ID** of the posted change is displayed in the corresponding field.

The screenshot shows the 'Sage Sales Order and Quote History Version Inquiry (ABC) 4/2/2014' window. The interface includes a top navigation bar with buttons for 'Activity...', 'Invoices...', and 'Credit...'. Below this is a tabbed interface with tabs for '1. Header', '2. Address', '3. Lines', and '4. Totals'. The '4. Totals' tab is selected, showing a summary of the order. The 'Order Date' is 4/2/2014, and the 'RMA No.' and 'Master/Repeating No.' fields are empty. The 'Customer No.' is 02-AMERCON, and the 'Customer PO' is empty. The 'Status' is 'Active Order', and the 'Cancelled Code' is empty. The 'Last Invoice Date' and 'Last Invoice No.' are empty. The 'Sales Tax' is 'CA', and the 'California' checkbox is checked. The 'Ship To Addr' is 'American Concrete Service', and the 'Terms Code' is '01'. The 'Ship Via' is 'MAIL', and the 'Warehouse' is '001 EAST WAREHOUSE'. The 'Confirm To' is 'MIKE THOMPSON', and the 'E-mail' is empty. The 'Comment' is empty. The 'Salesperson' is '0400 Ginny Hernandez', and the 'Split Comm.' is 'NO'. The 'User ID' is 'IIG useriig'.

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.

Sage Order Number List

Sales Order Number	Sequence Code	Order Date	Order Status	Bill To Name
0000175	00002	3/28/2014	A	American Business Futures
0000175	00003	3/28/2014	A	American Business Futures
0000175	00004	3/28/2014	A	American Business Futures
0000175	00005	3/28/2014	A	American Business Futures
0000175	00006	3/28/2014	C	American Business Futures
0000176	00001	3/28/2014	A	Avnet Processing Corp
0000176	00002	3/28/2014	X	Avnet Processing Corp
0000177	00001	3/28/2014	A	Breslin Parts Supply
0000177	00002	3/28/2014	A	Breslin Parts Supply
0000177	00003	3/28/2014	C	Breslin Parts Supply
0000178	00001	3/28/2014	A	American Business Futures
0000178	00002	3/28/2014	A	American Business Futures
0000179	00001	4/2/2014	A	American Concrete Service
0000179	00002	4/2/2014	A	American Concrete Service

Search: Sales Order Number Begins with Find

Filters... Custom...

Select Cancel [Excel Icon] [Print Icon] [Help Icon]

Found 19 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.

Line No.	Item Code	Item Description	Ordered	Unit Price	Extension
1	6655	PRINTER STAND W/ BASKET	4.00	179.000	716.00
2	VOG-CM-MP-B	MODESTY PANEL	2.00	40.740	81.48
3	1001-HON-H252	HON 2 DRAWER LETTER FLE ...	5.00	81.480	407.40

Total Amount: 1,204.88

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).

sage IIG Order Activity Tracking [X]

Order Number

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
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

OK

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) 10/07/2011

Report Setting: **STANDARD** [Save]

Description: Order Process Tracking Report

Setting Options

Type: Public [v] Print Report Settings: ☐ Number of Copies: 1 [v]

Default Report: ☒ Three Hole Punch: ☐ Collated: ☒

Options

Exclude Invoiced Orders? ☒

Selections

Select Field	Operand	Value
Sales Order Number	All [v]	

\\WIGSERVER\HP LaserJet 1022 [v] Keep Window Open After: Print ☐ Preview ☐ [Print] [Preview] [Setup] [?]

