Matrix Processing by Item
For Sage 100 ERP 2015

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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**!
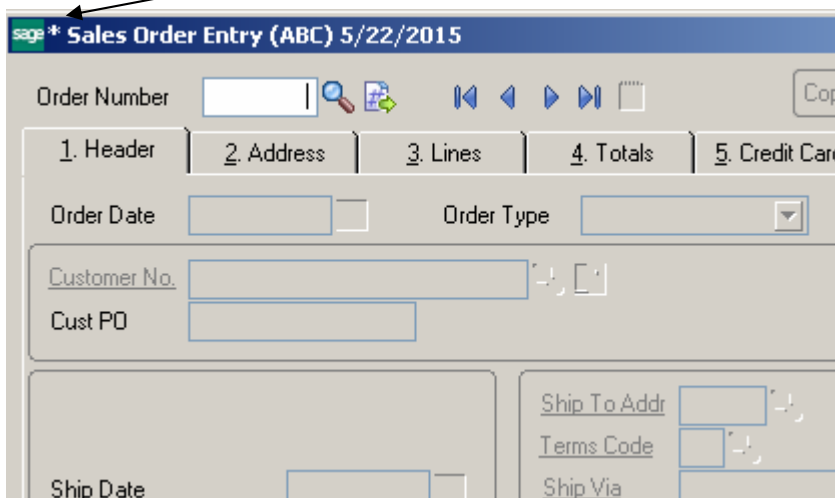
Registering IIG products

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.

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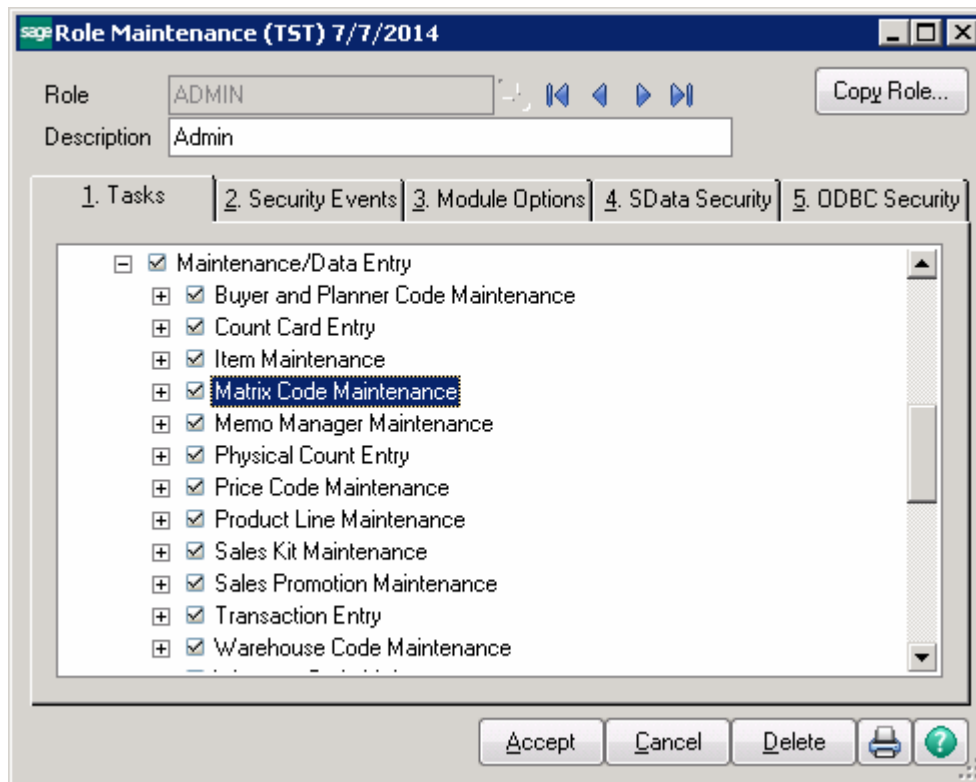457 PALM DRIVE   WWW.IIGSERVICES.COM
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ODBC Security

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.
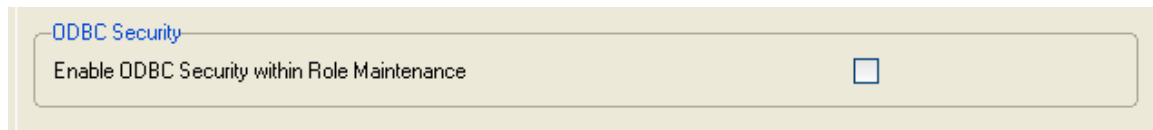
Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.

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Size & Color Matrix for Data Entries

Inventory Management Options

The **Matrix Processing by Item** section with **Master Item Code** Style, **Size** and **Color** fields have been added to the **Main** tab of the **Inventory Management Options** screen to allow for specifying the number of characters for respective segments of Master Items.

The first segment of Item Code "Style" indicates the size of Master Item Code. The second (Size) and third (Color) segments are intended correspondingly for indicating the number of characters for Size and Color.

If there are Matrix Codes already setup in the system based on the defined segments, the following message will appear upon changing the sizes of corresponding segments.

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Selecting **Yes** will allow the user to accept changes and delete all Matrix Codes previously setup.

Select **Item Codes** or **Matrix Codes** in the **Construct Grid by only existing** drop down to construct the Matrix grid by existing Item Codes or Matrix Codes.
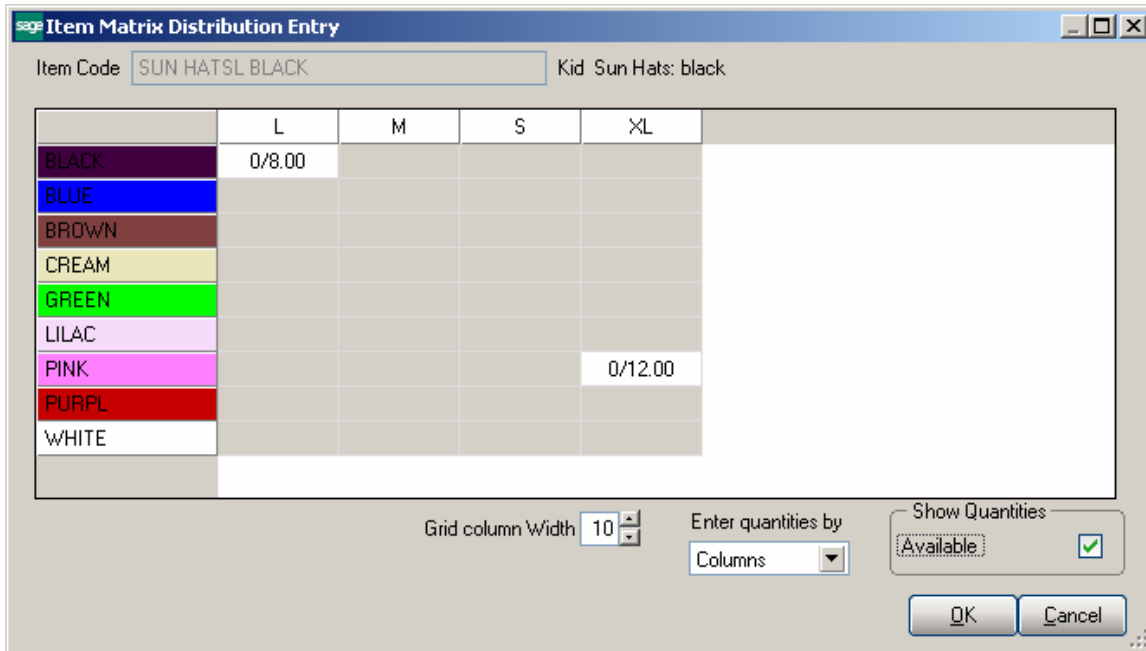
It's necessary to have the Item Codes with corresponding number of characters for Style, Size and Color segments setup in the system so that to have the Matrix Distribution grid constructed based on the **Item Codes**.

If Matrix **Code** is selected in the **Construct Grid by only existing** drop-down, the Item **Matrix Distribution Entry** looks as follows:

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The **Manual** button allows for viewing the MXI5.20 manual in PDF format.

The **Matrix Processing by Item** options are available also on the **Options Listing** report.

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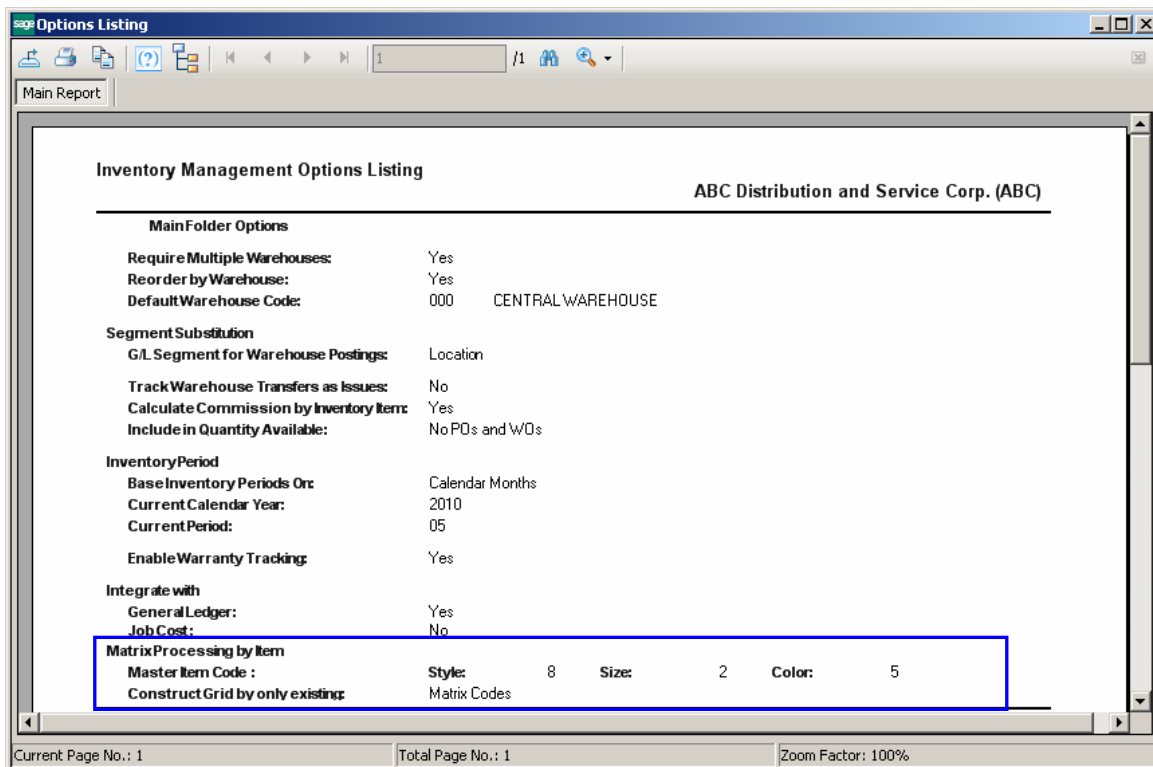
Item Maintenance

In the **Item Maintenance** enter an item with the Item Code size equal to the number of characters specified for Style in the Inventory Management Options and select **Master** in the **Master/Slave** drop down.

After accepting the Master Item it's necessary to enter corresponding Slave Items with Item Codes constructed as follows: **Master Item Code** + **Size** +**Color** and assign to respective **Master Item.**
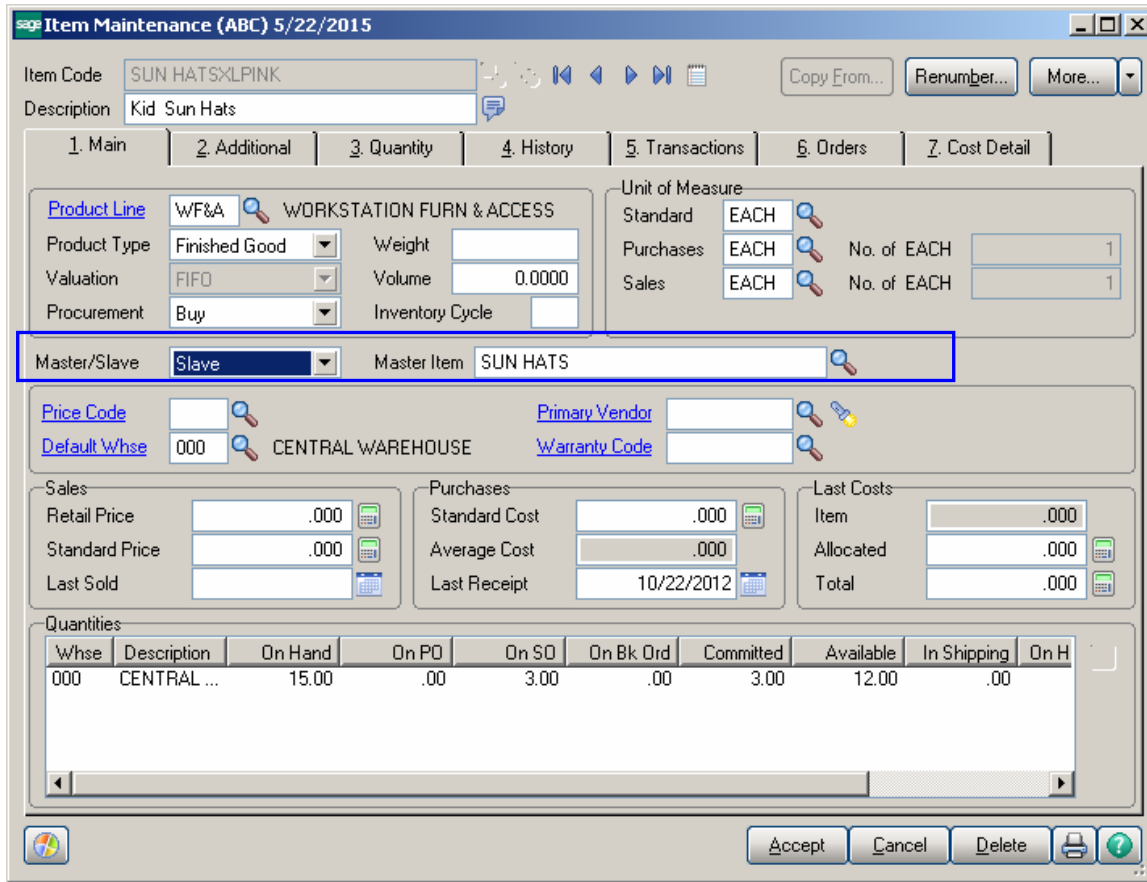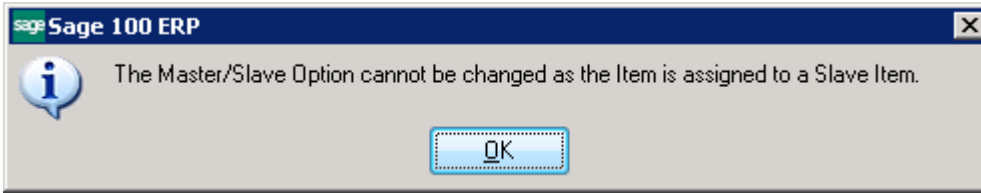
*Note: Specifying **Master Item** for Slave items is required in case you have selected the **Item Codes** option in the **Construct Grid by only existing** drop down in the Inventory Management Options.*

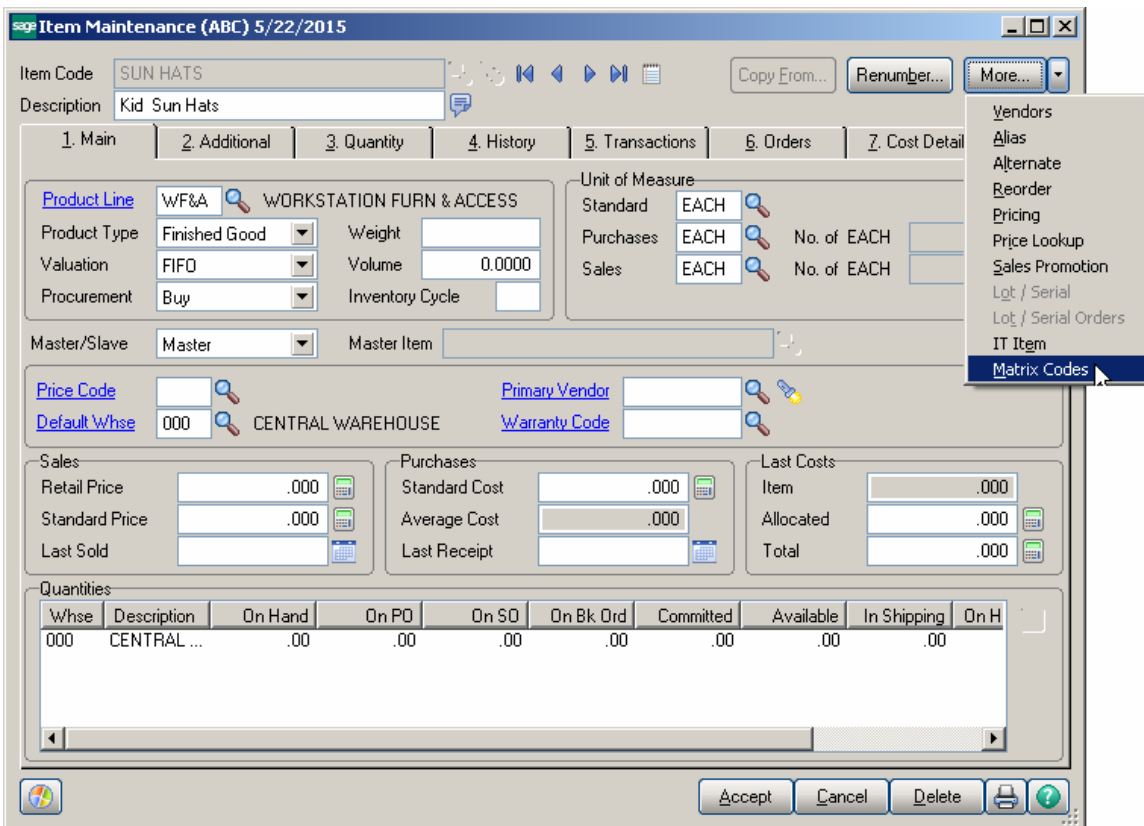The user is not allowed deleting Master Item if there is an Item (Slave) in the system to which it is assigned.
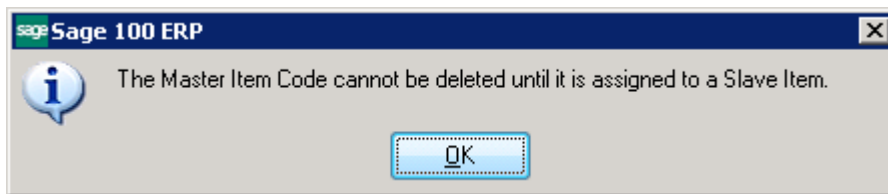
A message appears also when changing Master/Slave option for Master Item already assigned to a Slave one.

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If **Matrix Codes** is selected in the Inventory Management Options it's enough to have corresponding Item Codes setup in the system.
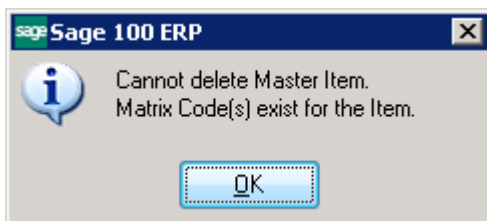
Select **Matrix Codes** from the **More...** menu button to open the **Matrix Code Maintenance** for the selected **Master Item**. This option is available only for Master Items.
 The Matrix Codes button is not available if **Construct Grid by only existing** option in the Inventory Management Options screen is set to **Item Codes.**
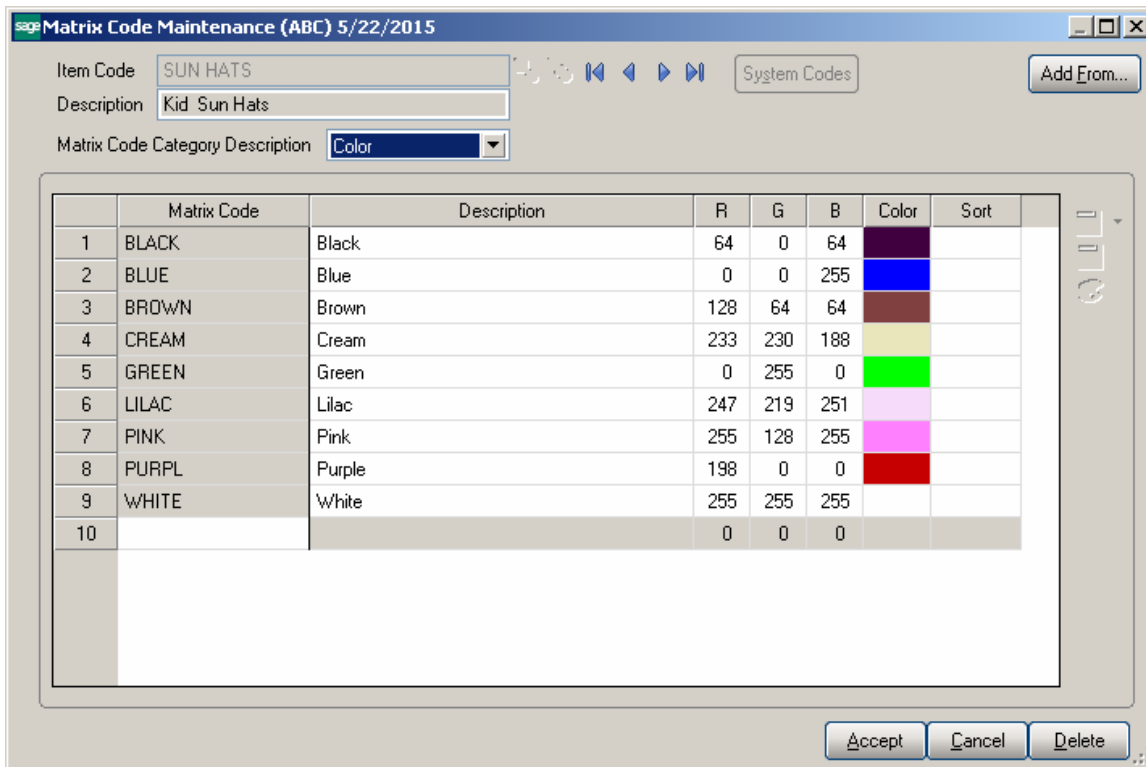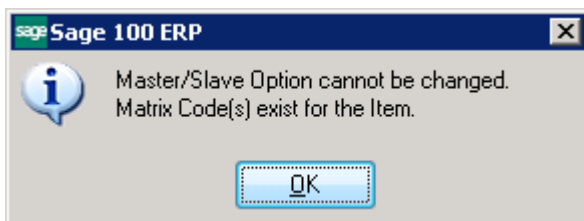
The user is not allowed to delete Master Item if there are Matrix Codes entered for it.


The user cannot change also the Master/Slave option for Master Item having Matrix Codes.
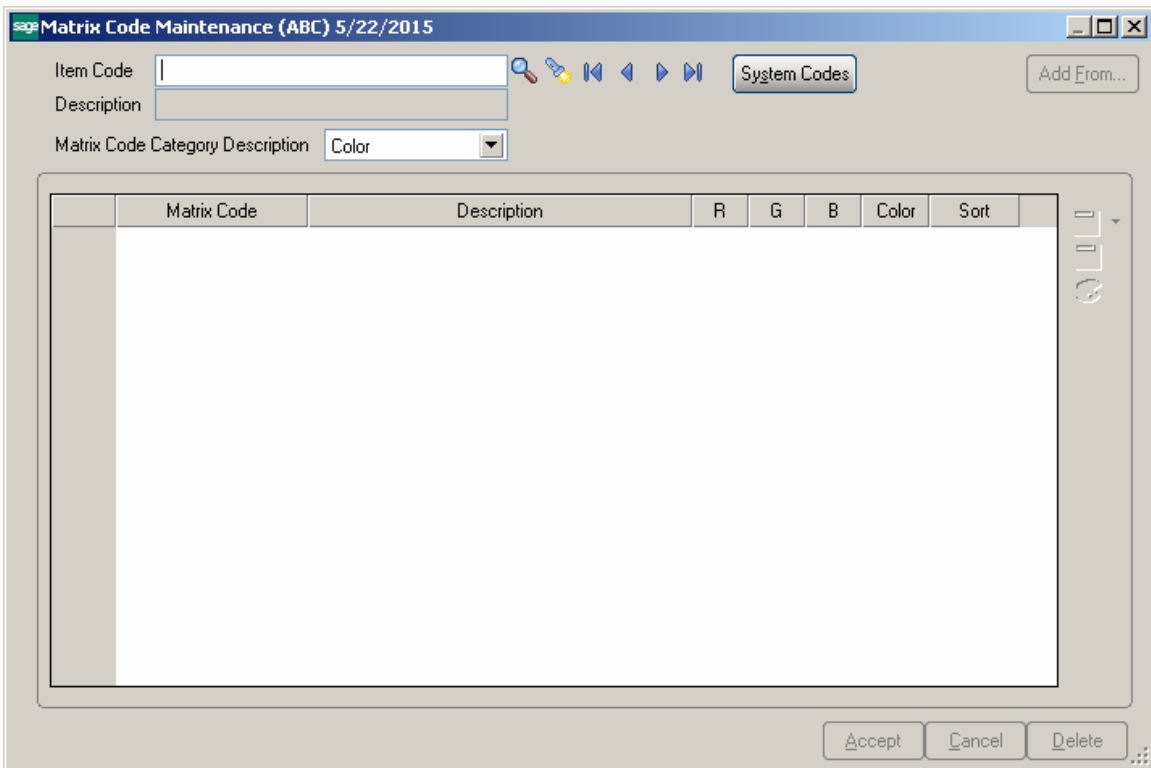

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Matrix Code Maintenance

The **Matrix Code Maintenance** has been added to the **Inventory Management Setup** menu to allow specifying Matrix Codes for Size/Color to be used for Master item.

The **Matrix Code Maintenance** is available in the system only if Matrix Codes option is selected in the Construct Grid by only existing drop- down in the Inventory Management Options, otherwise the following message will appear while trying to run the Matrix Code Maintenance:
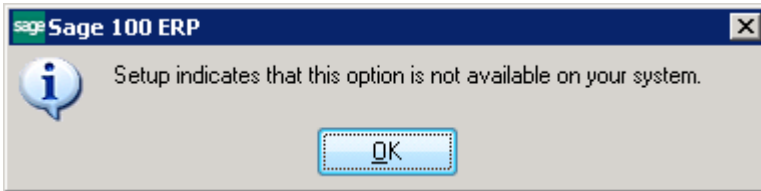
Each **Master Item** (item specified as Master in the **Inventory Maintenance** program) can have its own **Matrix Codes**. Besides it, Matrix Codes can be defined for the entire system.

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If there is not Item selected in the **Item No.** field, the **System Codes** button is enabled allowing the user to setup system matrix codes, which may be added to any Item.
The **Item Code** is defaulted to *SYSTEM_MATRIX* in this case:


To enter a new Code, first select the **Matrix Code Category** by Description and type in the **Matrix Code** and **Description.**
To assign **Color** to the selected Code, enter RGB values or click the **Color palette** button to select a color in the standard Windows **Color** screen.

Click **Del** to delete the selected Code from the grid.

To view/modify an existing Matrix Code select the Item code having Matrix Codes setup. All the Matrix Codes of current Item for the selected Category are loaded in the grid.
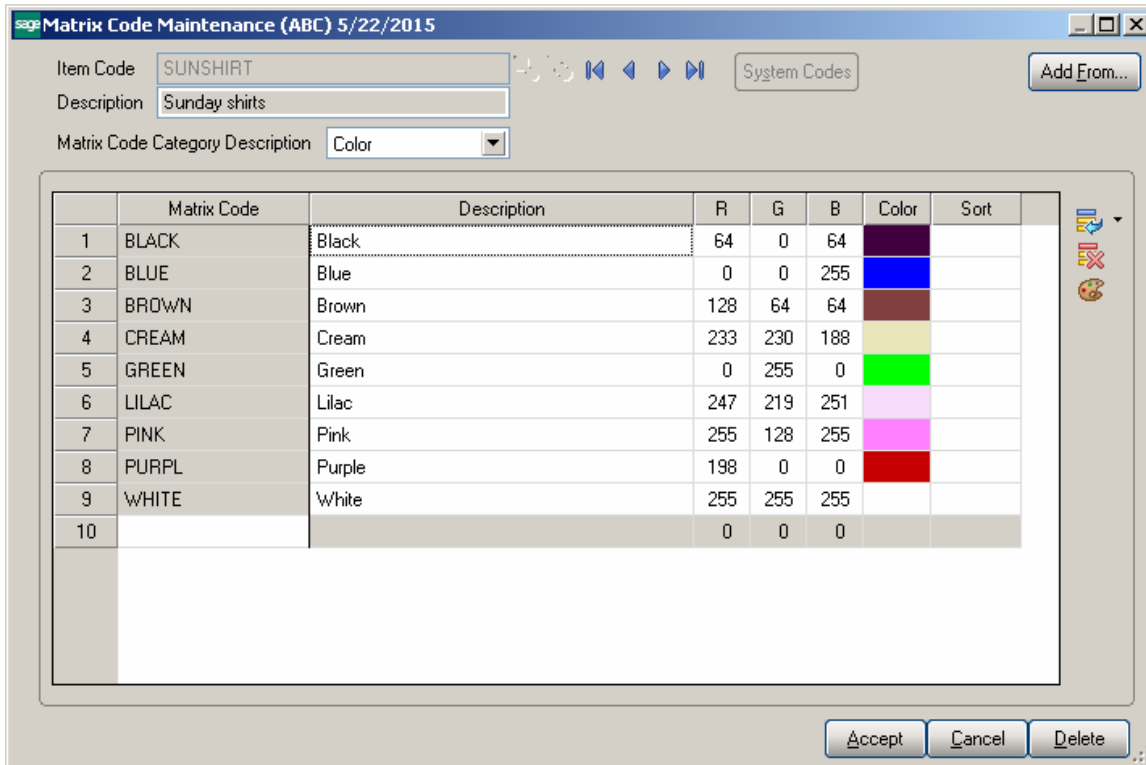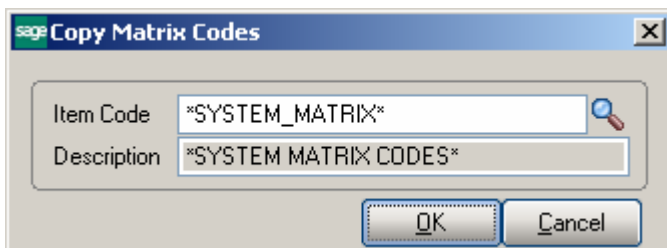
The **Add From** button allows copying and adding Matrix Codes from other Items. The existing Matrix Codes of the destination Item will be retained, and the copied Codes will be added. If the Code already exists, it is retained with all options and not overridden by the added Code.
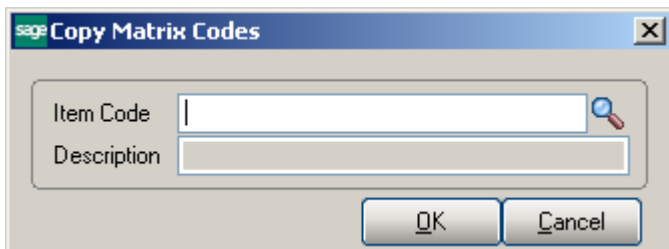
From the Item Code lookup select the Item, which Matrix Codes you want to copy.
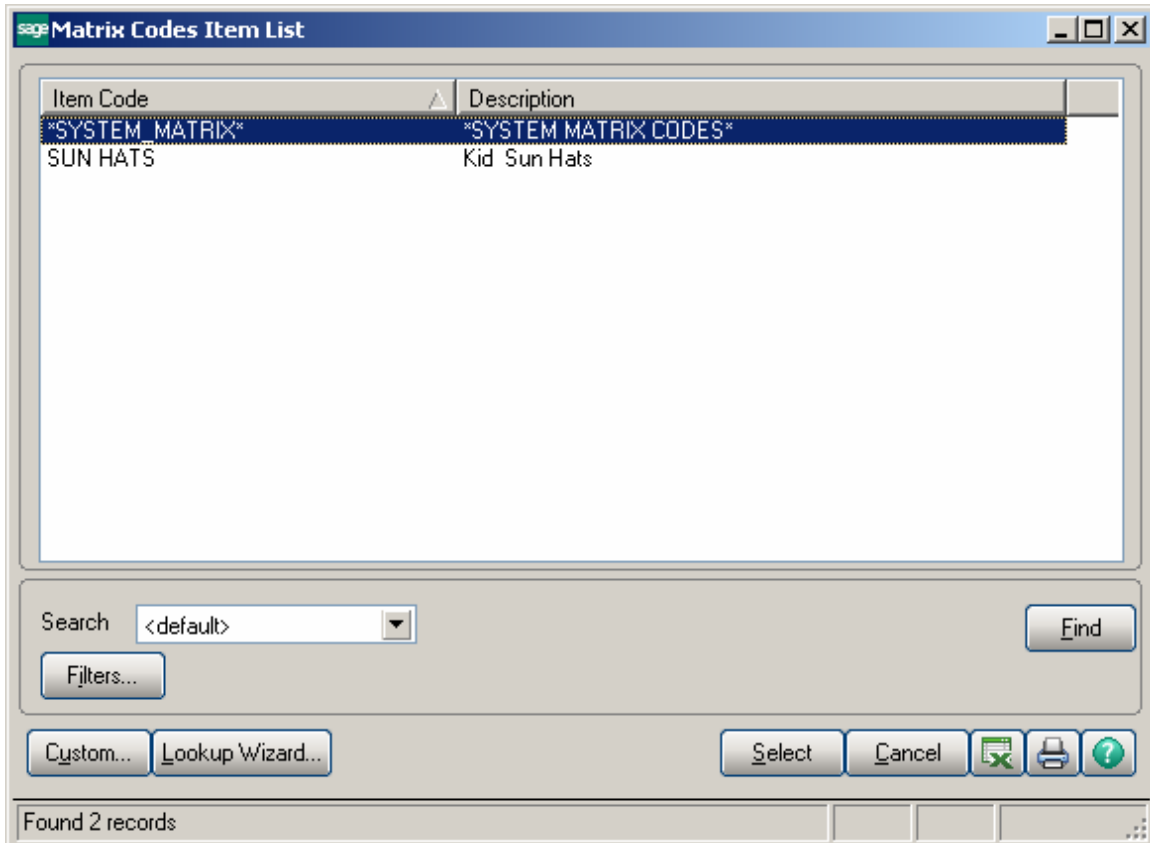
Press **Ok** to add the Matrix Codes of the selected Item to the new Item.

Delete- this button deletes all Matrix Codes setup for current Item.

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Purchase Order

Create a new **Purchase Order** and go to **Lines** tab. Select a **Master Item** from the **Item Code** lookup.

Item Matrix Distribution Entry screen will popup to allow ordering Items. In the **Show Quantities** group select/clear the **Available** check box to show/hide available quantity for each Item.

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Only the **Matrix Cells,** which refer to existing **Item Codes,** are available for entry**.** Enter quantities in the matrix grid and press **OK**. New order line will be added for each entered quantity with respective Item Code and Quantity.
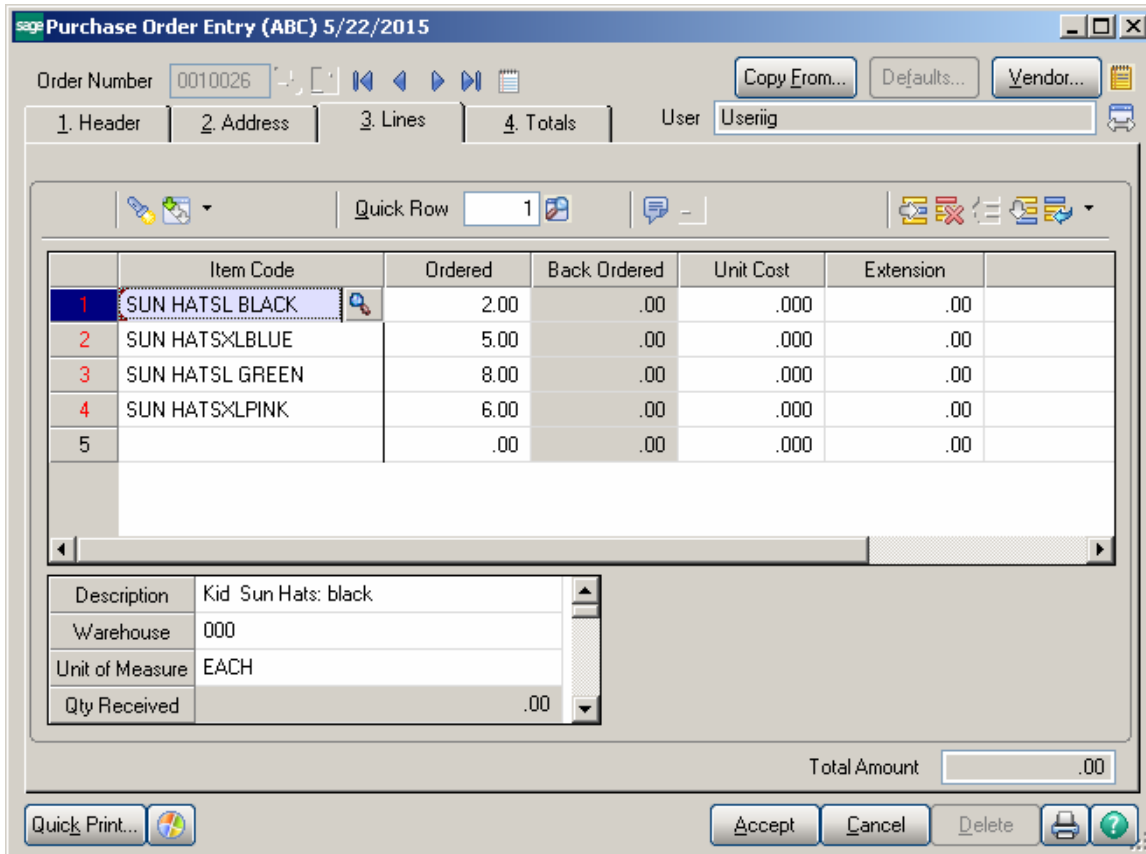
The same functionality has been provided also in the **Receipt of Goods Entry** and **Invoice Data Entry.**

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Sales Order Entry

Open the **Sales Order Entry** program and create a new Order. Go to **Lines** tab. Select a Master Item from the **Item Code** lookup.

Item Matrix Distribution Entry screen will popup to allow ordering Items. In the **Show Quantities** group select/clear the **Available** check box to show/hide available quantity for each item
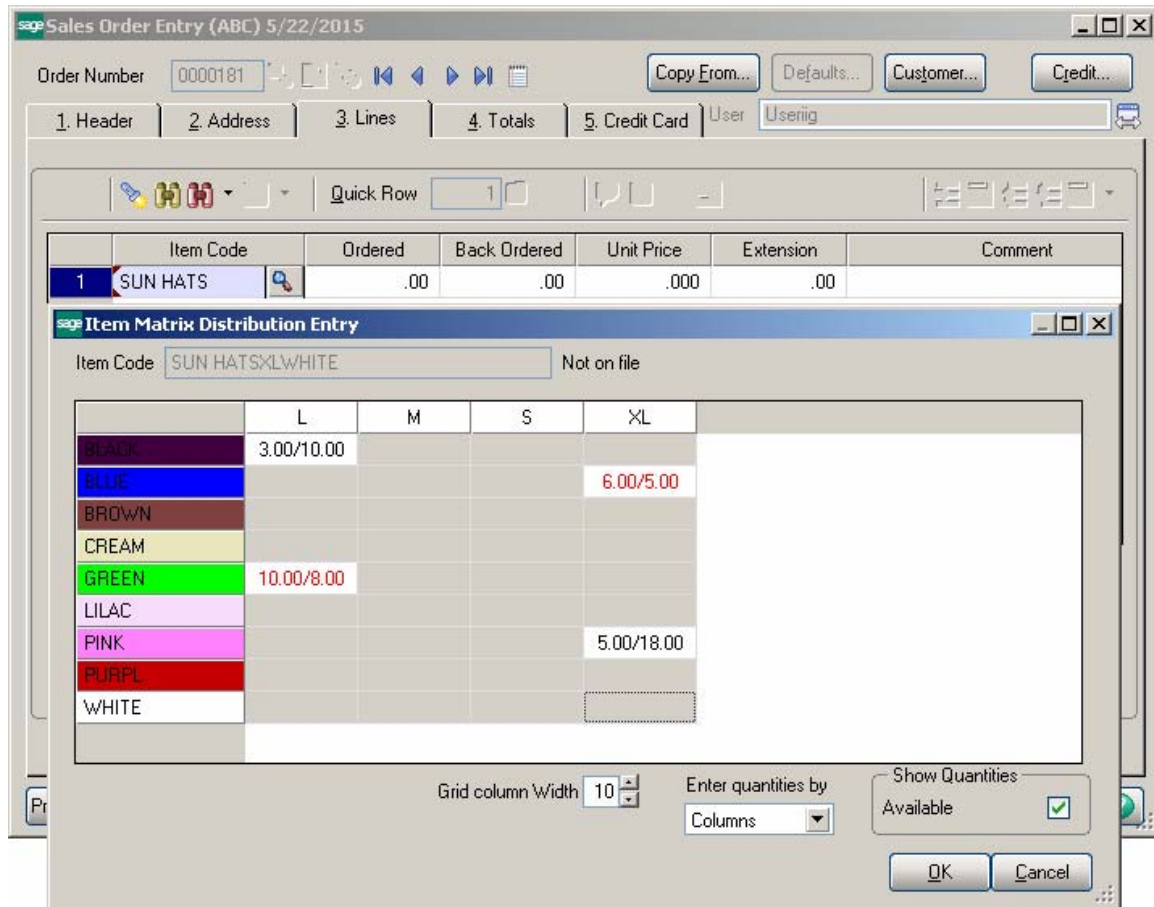
Enter quantities in the matrix grid and press **OK**. The user may enter more quantity than is available in the stock for current Item.

The font color of a cell is changed to red if the **Qty Entered** exceeds the **Qty Available.** The Quantity entered will be loaded into the line as **Ordered** quantity and the difference of **Qty Entered** and **Qty Available** will be automatically backordered. This logic is applied to the **Sales Quotes** as well.

 New order line will be added for each entered quantity with the corresponding Item Code and Quantity.
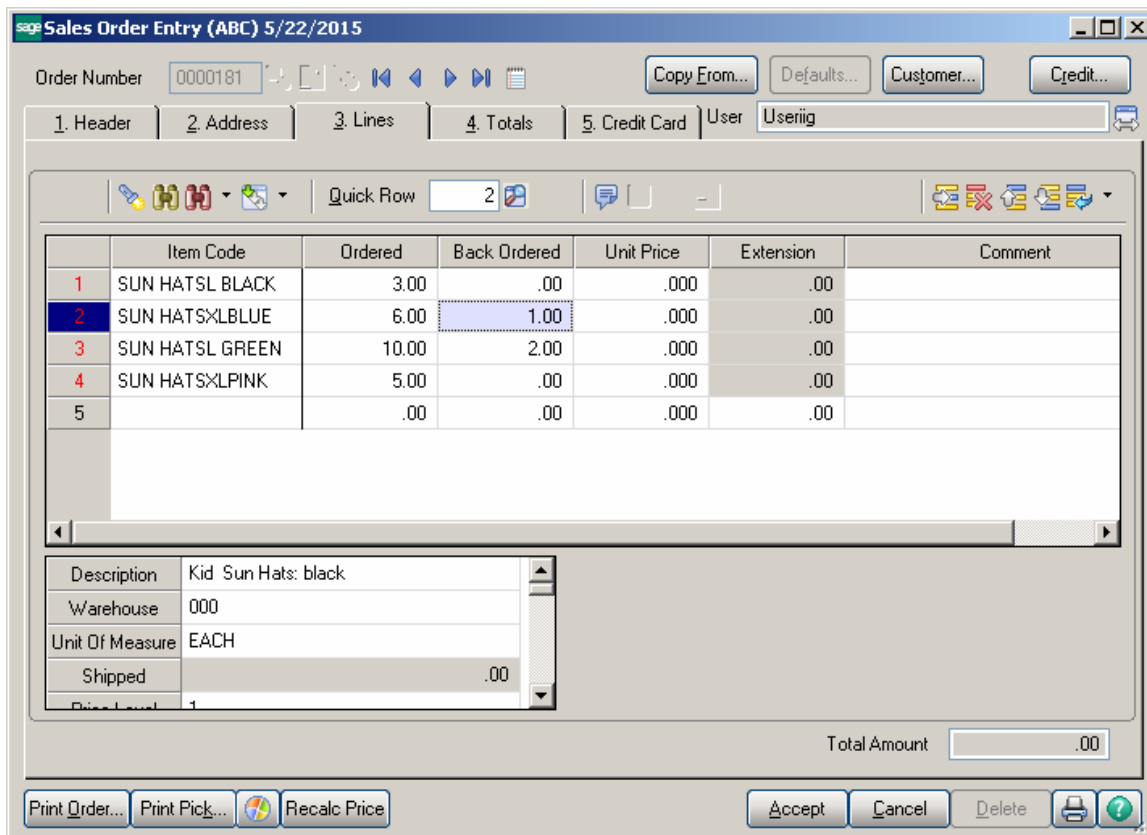
When Sales Order is created from a Master Order the program will check the Qty Available and automatically backorder the quantity exceeding Qty Available.