



Order Process Tracking For MAS 90 and MAS 200

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Installation Instructions and Cautions

PLEASE NOTE: MAS 90 must already be installed on your system before installing any IIG enhancement. If not already done, perform your MAS 90 installation and setup now; then allow any updating to be accomplished automatically. Once MAS 90 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

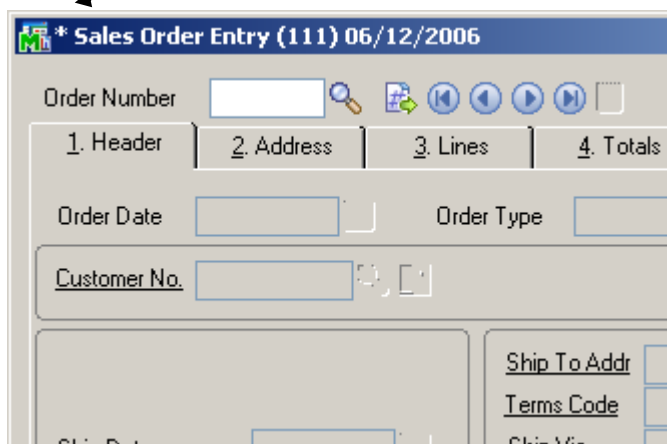
Wait! Before You Install – Do You Use CUSTOM OFFICE?

THIS IS AN IMPORTANT CAUTION: If you have Custom Office installed, **and** if you have modified any MAS 90 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 MAS 90.

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**.

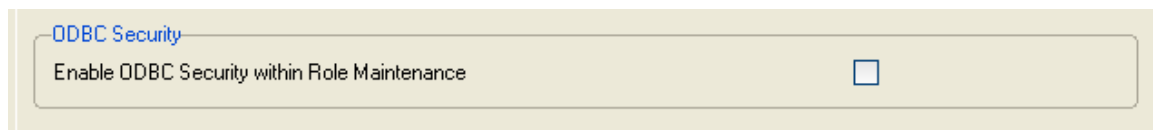
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

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.

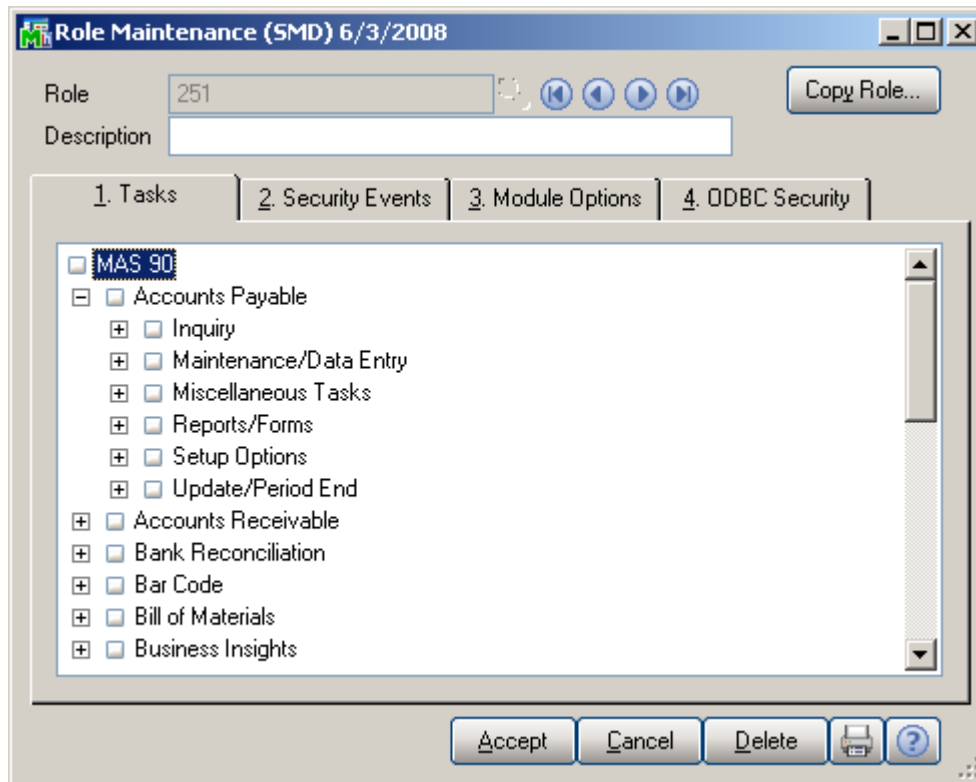
ODBC Security

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.

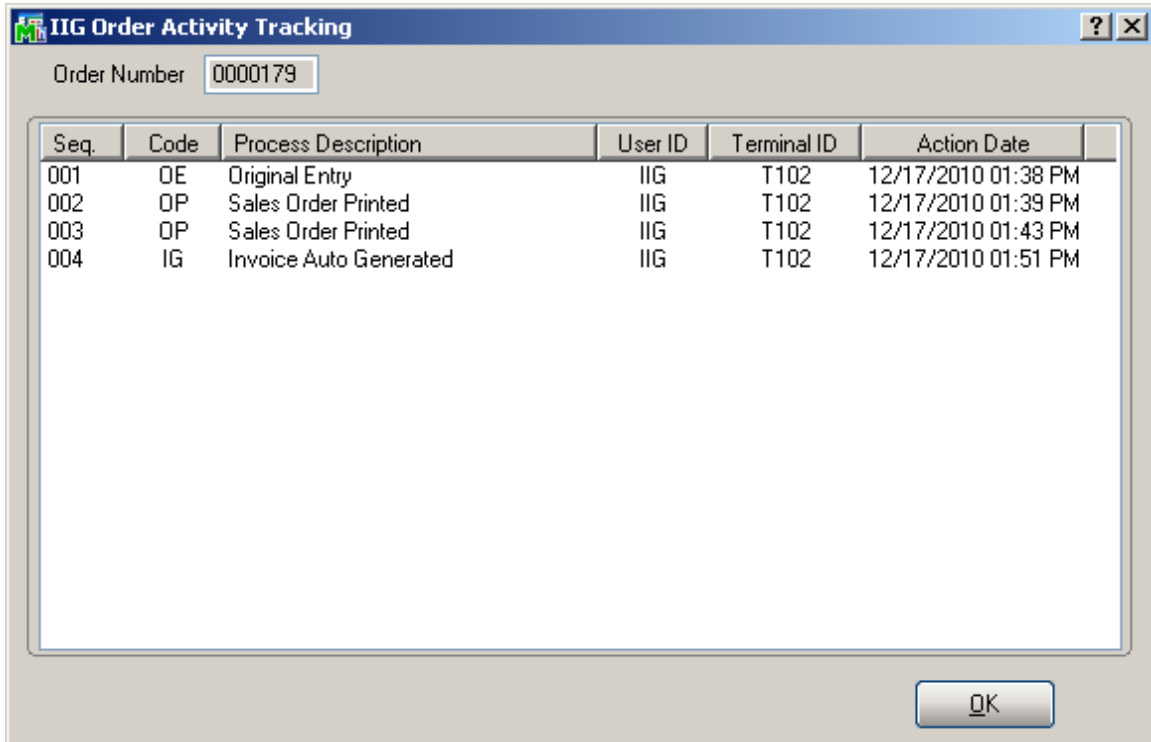
Sales Order Entry

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

The screenshot shows the 'Sales Order Entry' window for order 0000179. The 'Activity...' button is highlighted with a yellow box and a tooltip that reads 'Shows all activity on this order. Activity, Alt-5'. The window contains various fields for order details, including customer information, shipping details, and warehouse information. The 'Print Order' and 'Print Pick Sheets' options are checked, and the 'Recalc Price' button is visible at the bottom.

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.

Sales Order/Quote History Version Inquiry (ABC) 12/17/2010

Order Number 0000179 12/17/2010 01:38 PM Activity... Invoices... Credit...

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

Order Date 12/17/2010 RMA No. Master/Repeating No.

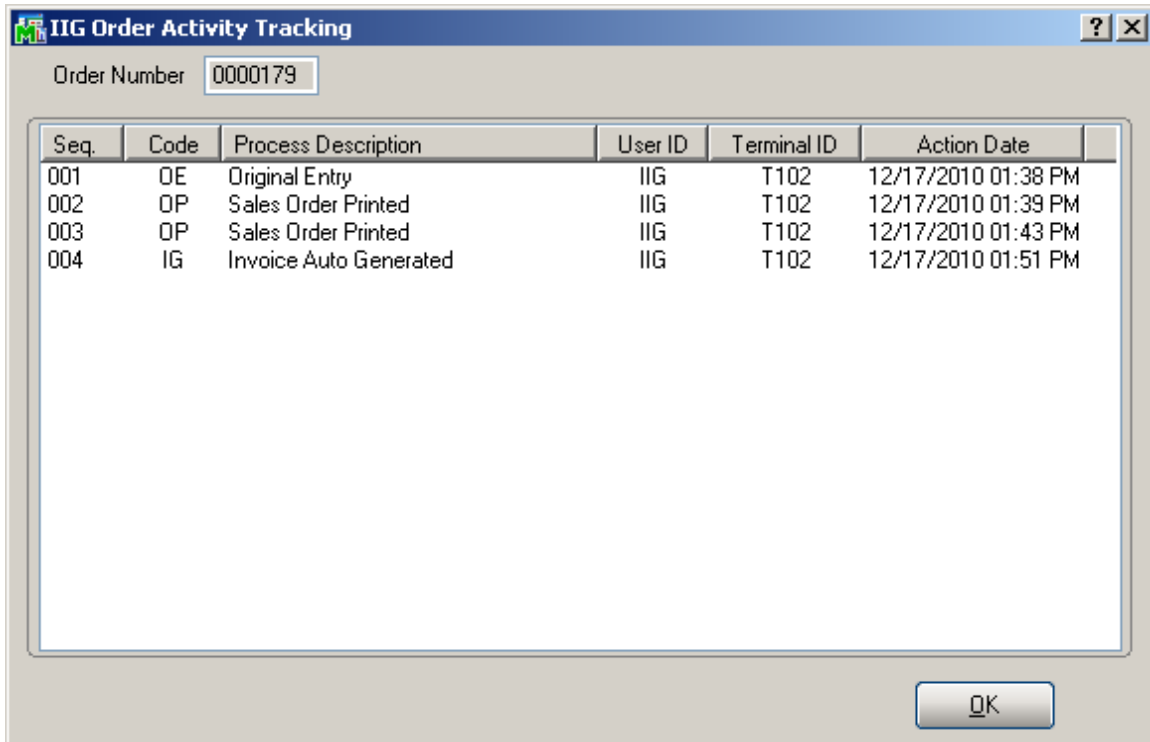
Customer No. 01-ABF American Business Futures
Customer PO VERBAL

Status Active Order
Cancelled Code
Last Invoice Date
Last Invoice No.

Ship To Addr 2 American Business Futures
Terms Code 01
Ship Via UPS BLUE FOB
Warehouse 001 EAST WAREHOUSE
Confirm To JOHN QUINN
E-mail artie@abf.com
Comment
Salesperson 0100 Jim Kentley
Split Comm. NO

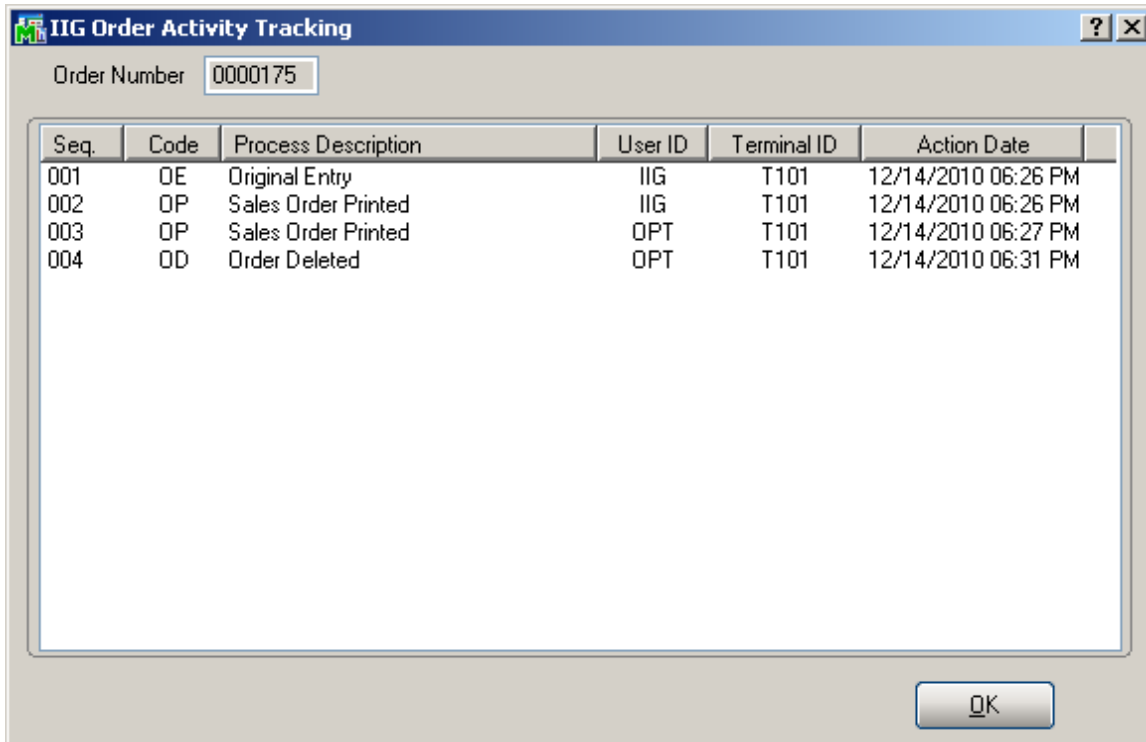
Sales Tax Schedule WI Wisconsin
User ID IIG USERIIG

OK ?

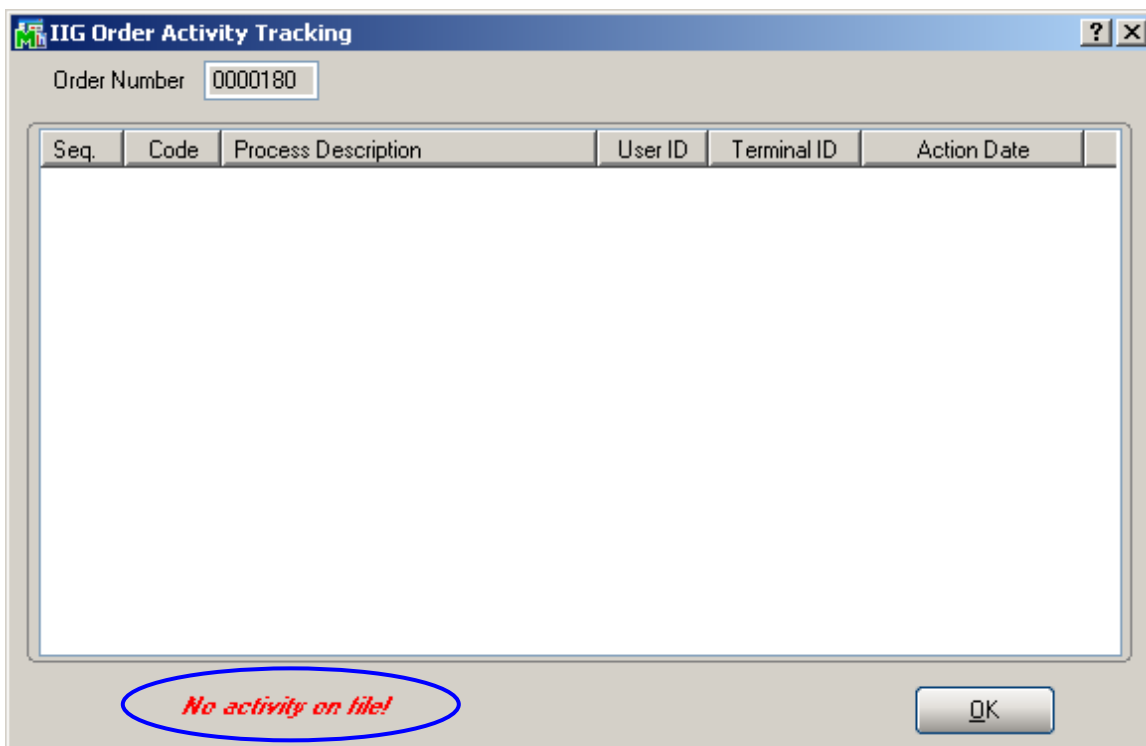


Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	IIG	T102	12/17/2010 01:38 PM
002	OP	Sales Order Printed	IIG	T102	12/17/2010 01:39 PM
003	OP	Sales Order Printed	IIG	T102	12/17/2010 01:43 PM
004	IG	Invoice Auto Generated	IIG	T102	12/17/2010 01:51 PM

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) 12/17/2010

Invoice No. Type Date

Source Order No.

1. Main | 2. Lines

Customer No. American Business Futures

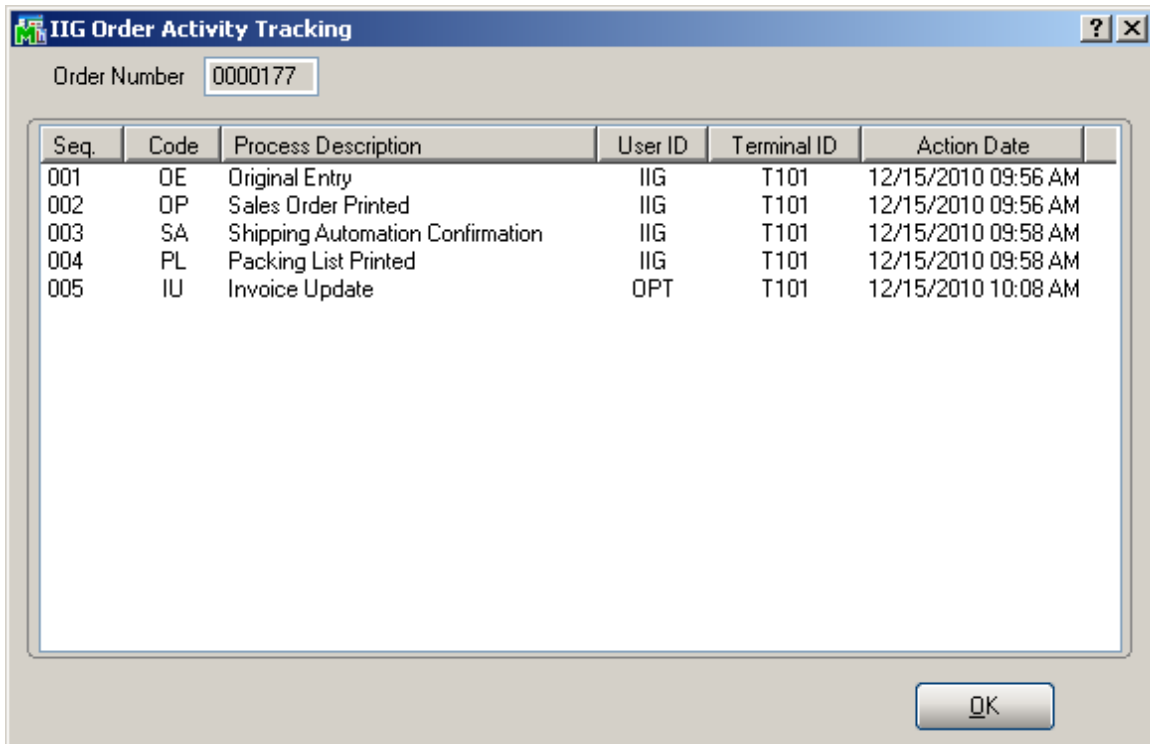
Ship To American Business Futures

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="12/15/2010"/>	Taxable	<input type="text" value=".00"/>
Ship Via	<input type="text" value="UPS BLUE"/>	Schedule	<input type="text" value="W1"/>	Nontaxable	<input type="text" value="595.90"/>
FOB	<input type="text" value=""/>	Ship Zone	<input type="text" value=""/>	Freight	<input type="text" value=".00"/>
Customer PO	<input type="text" value="11"/>	Weight	<input type="text" value="70"/>	Sales Tax	<input type="text" value=".00"/>
Salesperson	<input type="text" value="01-0100"/> Jim Kentley	Apply To	<input type="text" value=""/>	Discount	<input type="text" value=".00"/>
Confirm To	<input type="text" value="John Quinn"/>	IT User ID	<input type="text" value=""/>	Invoice Total	<input type="text" value="595.90"/>
Comment	<input type="text" value=""/>			Deposit	<input type="text" value=".00"/>
E-mail	<input type="text" value="artie@abf.com"/>			Net Invoice	<input type="text" value="595.90"/>
Fax	<input type="text" value=""/>	Batch Fax	<input type="checkbox"/>	Balance	<input type="text" value="595.90"/>
Cred Card No.	<input type="text" value="*****6780"/>				

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 search field for "Order Number" containing "0000177". Below the search field is a table with the following data:

Seq.	Code	Process Description	User ID	Terminal ID	Action Date
001	OE	Original Entry	IIG	T101	12/15/2010 09:56 AM
002	OP	Sales Order Printed	IIG	T101	12/15/2010 09:56 AM
003	SA	Shipping Automation Confirmation	IIG	T101	12/15/2010 09:58 AM
004	PL	Packing List Printed	IIG	T101	12/15/2010 09:58 AM
005	IU	Invoice Update	OPT	T101	12/15/2010 10:08 AM

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

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

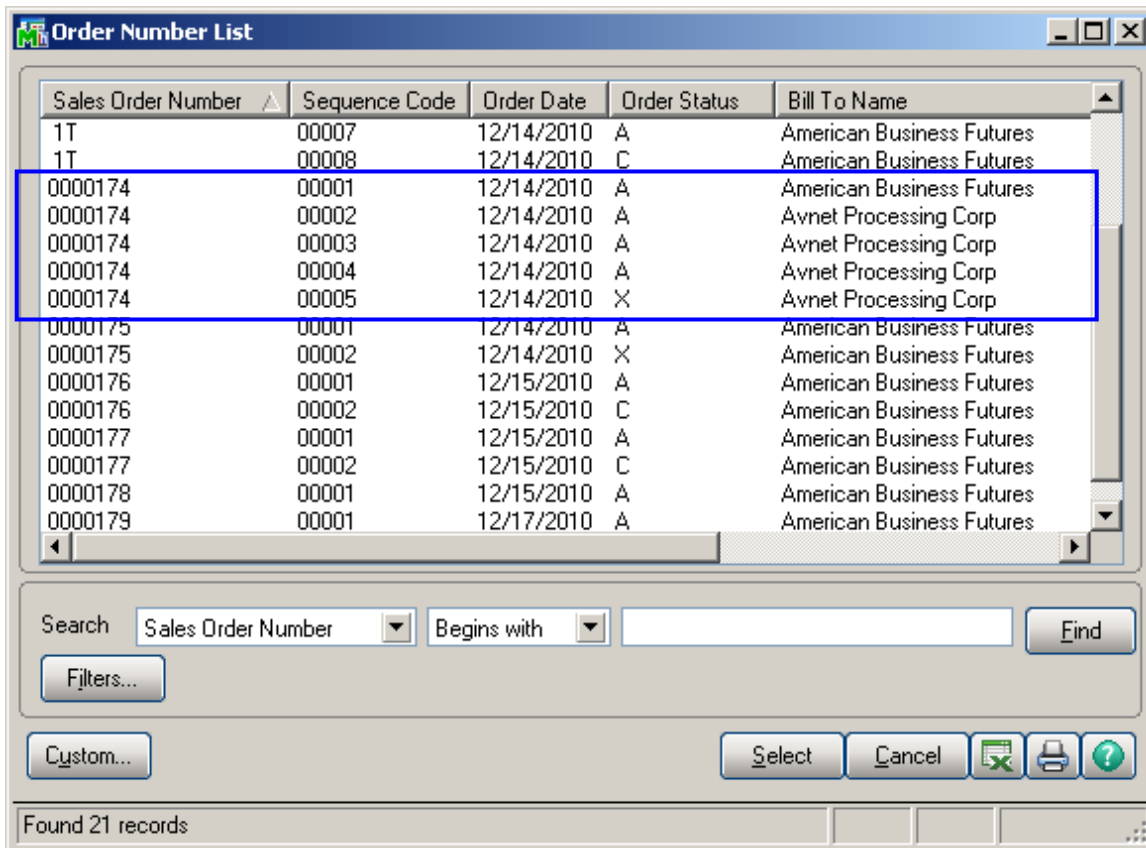
The **Order/Quote Hist. Version Inquiry** program has been added under the **Sales Order Inquires** menu to allow recording changes made to Sales Order (except printing).

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 'Sales Order/Quote History Version Inquiry' window. The title bar reads 'Sales Order/Quote History Version Inquiry (ABC) 12/17/2010'. The main area is divided into several sections. At the top, there's a header section with 'Order Number' 0000174, navigation arrows, and a date/time field '12/14/2010 05:44 PM'. Below this are tabs for '1. Header', '2. Address', '3. Lines', and '4. Totals'. The main form area contains fields for 'Order Date' (12/14/2010), 'RMA No.', 'Master/Repeating No.', 'Customer No.' (01-AVNET), 'Customer PD', 'Status' (Active Order), 'Cancelled Code', 'Last Invoice Date' (12/14/2010), 'Last Invoice No.' (0100056), 'Sales Tax Schedule' (CA), 'Ship To Addr' (2 Irvine Warehouse), 'Terms Code' (01), 'Ship Via' (UPS BLUE), 'Warehouse' (002 WEST WAREHOUSE), 'Confirm To' (TERRY STAFFORD), 'E-mail' (tonys@avnet.com), 'Salesperson' (0200 Shelly Westland), and 'Split Comm.' (NO). The 'User ID' field is highlighted with a blue oval and contains 'IIG USERIIG'.

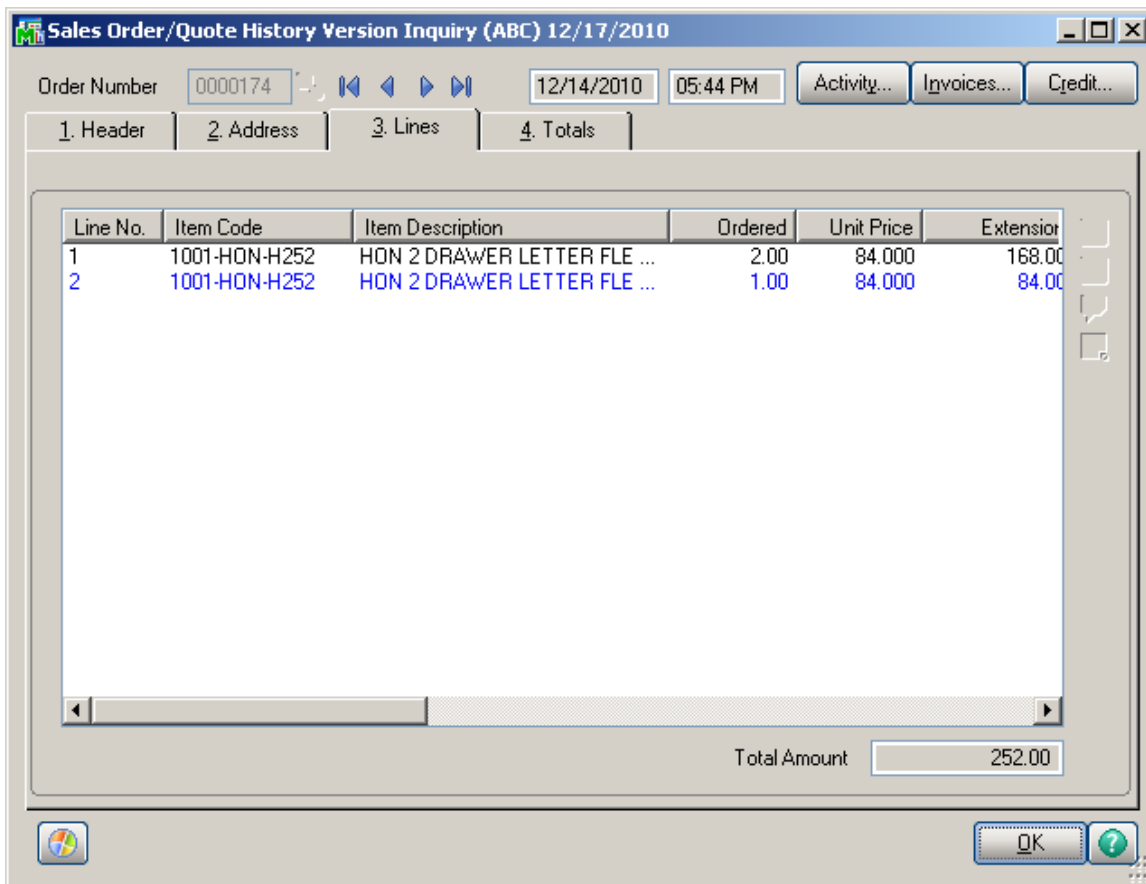
The changed Sales Orders themselves can be seen on the **Sales Order/Quote History Version Inquiry** screen, too. All changed Orders have the same **Sales Order Number** but different **Sequence Codes**.

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



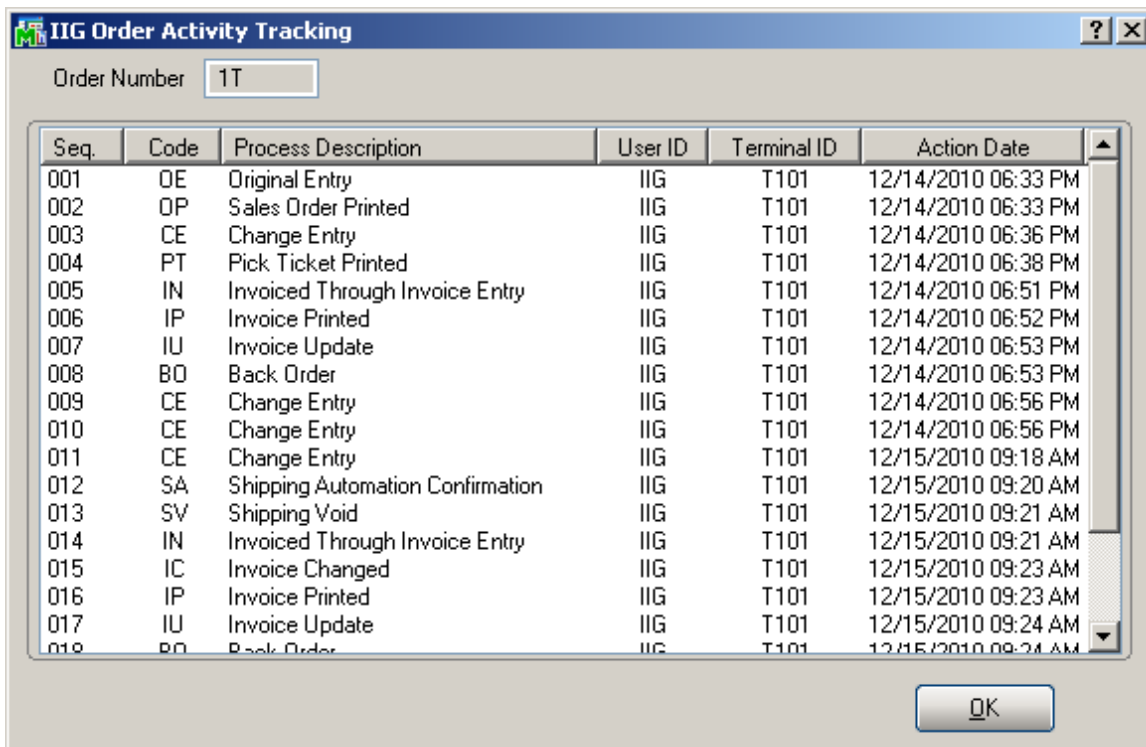
The **Sales Order/Quote History Version Inquiry** program record also the newly created Sales Orders, including Back Orders being generated during invoice update.

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 will be displayed with each change Sequence Number, Code, Process Description, User ID (who performs the change), and Action Date/Time (when the change has occurred).



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**.

Report Setting: STANDARD

Description: Order Process Tracking Report

Setting Options:

- Type: Public
- Print Report Settings:
- Three Hole Punch:
- Number of Copies: 1
- Collated:

Options:

- Exclude Invoiced Orders?

Selections:

Select Field	Operand	Value
Sales Order Number	All	

Deferred

Keep Window Open After:

Print Preview **Print** **Preview** Setup ?

Here is an example of the printout:

ABC Distribution and Service Corp. (ABC)
IIG Order Process Tracking Report *Excluding invoiced orders.*

ORDER		CUSTOMER					
Seq	Date	Time	Action	User	Terminal ID		
0000171	01-ABF	American Business Futures					
001	12/14/2010	06:22 PM	Original Entry	OPT	T101		
002	12/14/2010	06:22 PM	Sales Order Printed	OPT	T101		
003	12/14/2010	06:23 PM	Pick Ticket Printed	IIG	T101		
Total transactions for order				0000171	3		
Total Orders:		1	Transactions:		3		