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## A/R Enhanced Invoice History Search

AR-1027

### Overview

This Extended Solution adds the following new search options to Accounts Receivable Invoice History Inquiry and Sales Order Copy From: Customer Phone Number, Lot/Serial Number, Ship To Zip, Customer PO Number, Invoice Header Comment, Ship To Code, Invoice Date, two Invoice History Header UDFs, and two Invoice History Detail UDFs.

### Installation

Before installing this Extended Solution, please verify that the version level(s) printed on the CD label are the same as the version level(s) of the MAS 90 MAS 200 module(s) you are using. For further information, please see the Upgrades and Compatibility section below. Check your Shipping Manifest for a complete list of Extended Solutions shipped.

For detailed installation instructions, please refer to the Sage website at:

[http://support.sagesoftwareonline.com/mas/extended\\_solutions/main.cfm](http://support.sagesoftwareonline.com/mas/extended_solutions/main.cfm)

### ***Installing Your Extended Solutions under Windows From a CD***

If you have the *autorun* function turned on for your PC, the installation program will start up automatically. If not, find the **autorun.exe** file on your CD-ROM drive and double-click it to start the installation program. Follow the on-screen instructions.

### **From the Sage FTP site**

When your Extended Solution is ready to be downloaded, you will receive an email from 'extendedsolutions.na@sage.com' telling you that it is ready. The email will contain the Customer Name, Cross Reference, a case-sensitive Password, a link via which you can download your Extended Solution, instructions, and a Shipping Manifest. If you have any problems with this order, please email [extendedsolutions.na@sage.com](mailto:extendedsolutions.na@sage.com) and we will assist you during normal business hours.

### ***Extended Solutions Control Center***

Installing any Extended Solution will add an Extended Solutions Control Center to the MAS 90 MAS 200 Library Master Utilities menu. When you open the Control Center, the following options will be available:

- Extended Solutions Manuals
- Remove Extended Solutions
- Unlock Extended Solutions
- Merge Installation Files
- Extended Solutions Setup options

## Extended Solutions

**Custom Office**

If you customize your MAS 90-MAS 200, then you must run the Update Utility *every time* you install this Extended Solution.

**Setup**

Upon completion of software installation, you will need to access Extended Solutions Setup from the Accounts Receivable Setup menu. Select this part number and the Setup screen for this Extended Solution will appear (Figure 1). Check the 'Enable Extended Solution' box to activate this Extended Solution. The manual for this Extended Solution can be viewed by clicking the 'Manual' button next to the 'Enable Extended Solution' check box. It can also be viewed via the Extended Solutions Control Center (see Installation, above).

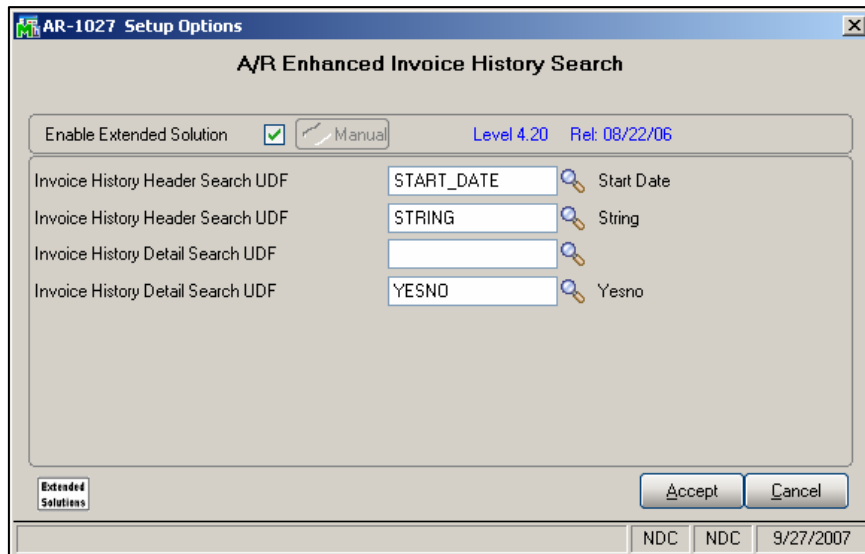


Figure 1

If you wish to add search capabilities to Invoice History header or detail UDFs, answer the following prompts:

**INVOICE HISTORY HEADER SEARCH UDF:** Specify a non-numeric UDF.

**INVOICE HISTORY HEADER SEARCH UDF:** Specify a non-numeric UDF.

**INVOICE HISTORY DETAIL SEARCH UDF:** Specify a non-numeric UDF.

**INVOICE HISTORY DETAIL SEARCH UDF:** Specify a non-numeric UDF.

You will need to rebuild sort files in the AR module if you specified header or detail UDFs; go to Library Master / Utilities / Rebuild Sort File to rebuild.

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You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

### Role Maintenance

The following Task has been added to Accounts Receivable, Setup Options:

- Extended Solutions Setup

Please review your security setup in Role Maintenance and make appropriate changes.

### Operation

An Invoice Search button has been added to Invoice History Inquiry (Figure 2) and Sales Order 'Copy From' (Figure 3).

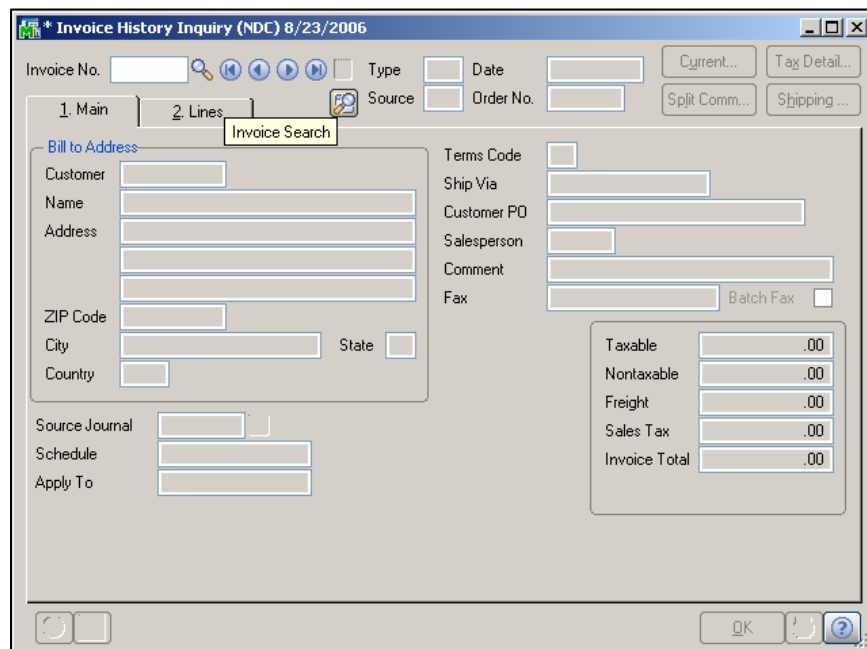


Figure 2

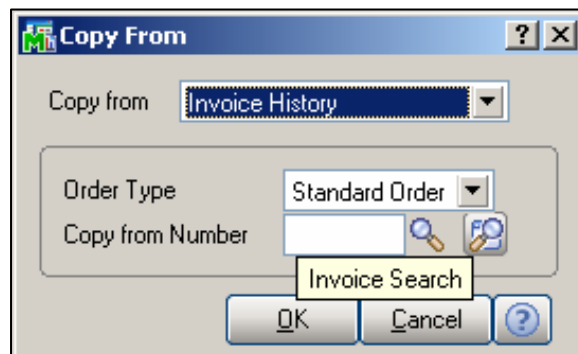


Figure 3

## Extended Solutions

Click the button to access the Search Options (Figure 4) where you may select

- Customer Phone Number
- Lot/Serial Number
- Ship To Zip Code
- Custom P/O Number
- Invoice Header Comment
- Invoice Date\*
- Ship To Code
- 2 specified Header UDFs by title\*
- 2 specified Detail UDFs by title\*

\*When searching by date (Invoice Date or date-type UDF), you need to enter the search value in YYYYMMDD format. You can enter a partial date such as '2007' or '200709'.

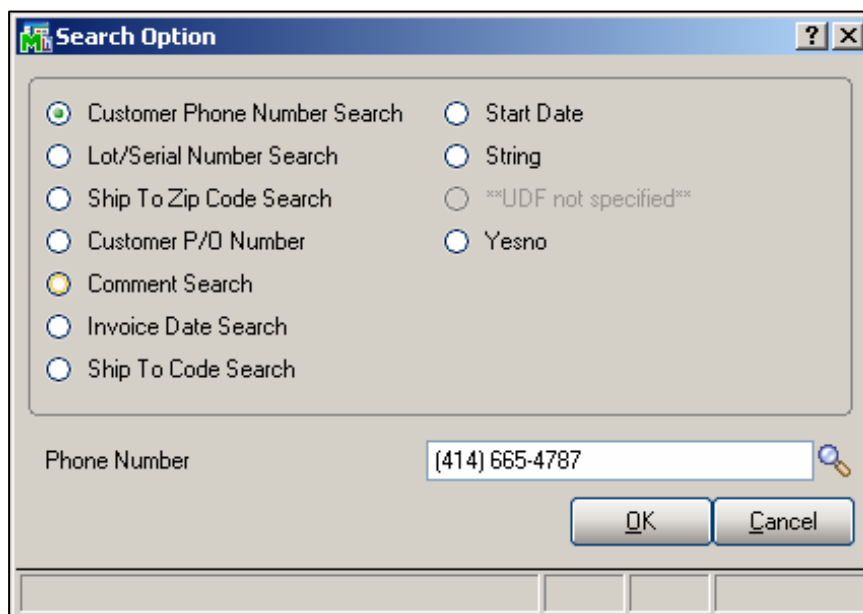
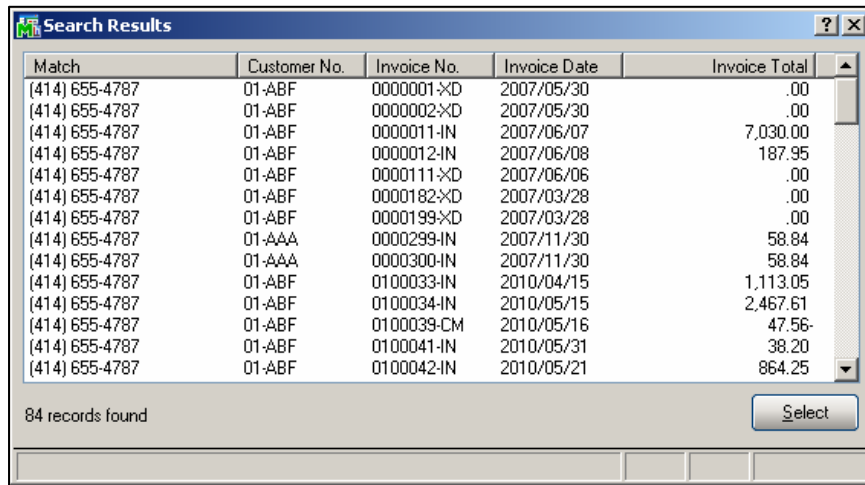


Figure 4

The Search value at the bottom of the screen will change as the Search option radio button is selected. Using the Phone Number as an example, after you fill in the phone number and click OK, the 'Invoice Search by Phone' screen will display all invoices that match the search criteria (Figure 5). Highlight the desired entry and click the 'Select' button.

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The screenshot shows a window titled "Search Results" with a table of data. The table has five columns: Match, Customer No., Invoice No., Invoice Date, and Invoice Total. There are 15 rows of data. At the bottom of the window, it says "84 records found" and there is a "Select" button.

Match	Customer No.	Invoice No.	Invoice Date	Invoice Total
(414) 655-4787	01-ABF	000001-XD	2007/05/30	.00
(414) 655-4787	01-ABF	000002-XD	2007/05/30	.00
(414) 655-4787	01-ABF	000011-IN	2007/06/07	7,030.00
(414) 655-4787	01-ABF	000012-IN	2007/06/08	187.95
(414) 655-4787	01-ABF	0000111-XD	2007/06/06	.00
(414) 655-4787	01-ABF	0000182-XD	2007/03/28	.00
(414) 655-4787	01-ABF	0000199-XD	2007/03/28	.00
(414) 655-4787	01-AAA	0000299-IN	2007/11/30	58.84
(414) 655-4787	01-AAA	0000300-IN	2007/11/30	58.84
(414) 655-4787	01-ABF	0100033-IN	2010/04/15	1,113.05
(414) 655-4787	01-ABF	0100034-IN	2010/05/15	2,467.61
(414) 655-4787	01-ABF	0100039-CM	2010/05/16	47.56
(414) 655-4787	01-ABF	0100041-IN	2010/05/31	38.20
(414) 655-4787	01-ABF	0100042-IN	2010/05/21	864.25

Figure 5

**ODBC Dictionary**

The files listed below have been added, or changed, in the ODBC Dictionaries by this Extended Solution for Crystal Reports purposes.

<i>File:</i>	<i>Fields:</i>
AR_InvoiceHistoryHdrSort_001	All
AR_InvoiceHistoryDtISort_001	All

Be aware that the ODBC Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

**What's New**

*With the 12-03-07 release*

- Replaced standard lookup with list box to display search results.
- Added Ship To Code, Ship To Zip, and Comment as alternate keys in AR Invoice History Header file.
- Added sort files for UDF search.

*With the 09-27-07 release*

- Added two Invoice History Header UDFs and two Invoice History Detail UDFs.
- Added the following options back: Ship To Zip Code, Customer P/O Number, Comment, Invoice Date, and Ship To Code.

**Upgrades and Compatibility**

The installation CD is labeled with the version of the MAS 90 MAS 200 module for which this Extended Solution was prepared. This Extended Solution will check its compatibility with the

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appropriate MAS 90 MAS 200 modules and will be disabled if an incompatibility is found. If you upgrade your MAS 90 MAS 200 modules, this Extended Solution must be upgraded as well. Your MAS 90 MAS 200 dealer can supply this upgrade.

### Documentation

Only changes made by Sage Software, Inc. to the standard operation of Sage Software, Inc. MAS 90 MAS 200 have been documented in this manual. Operations not documented in this manual are standard procedures of MAS 90 MAS 200 processing. Standard MAS 90 MAS 200 processes, data entry screens, inquiry screens, reports, updates, etc., have not been changed unless addressed in this document.

Parts of this document may refer to the *Specific Purpose Rule*. When referenced, the described feature was developed for a specific client to its specifications and may not conform to generally accepted MAS 90 MAS 200 standards and procedures. These features may or may not benefit you in your application of MAS 90 MAS 200.

### Acknowledgments

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