
Paperless Office: Sales Orders

SO-1463

Overview

This Extended Solution to the standard MAS 90 MAS 200 Sales Order module prints Sales Orders to PDF files.



Additional functionality is available if LM-1019: *Electronic Forms Delivery* is also installed and enabled.

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

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 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 Sales Order 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

Answer the following prompts:

DIRECTORY: Select a directory where PDF documents will be placed.



If you are running MAS 200, you should use UNC names as opposed to drive letters. If you do use drive letter, be certain that the path is valid and points to the same location on both the workstations and the server.

ONLY KEEP LAST COPY: Check this box to keep only one copy of a sales order. Reprinting a sales order will overwrite the last copy. Uncheck this option to keep every copy of a sales order ever printed. A sequence number will be appended to the filename.

Extended Solutions



The following options are available only if you have LM-1019: *Electronic Forms Delivery* installed and enabled.

SPECIFY E-MAIL/FAX ON ORDER: This option will allow you to add an additional email address via a UDF, or to use the Fax Number on the document. Select 'No,' 'In Addition to Customer Masterfile Information,' or 'Instead of Customer Masterfile Information.'

S/O ORDER UDF TO USE FOR EMAIL ADDRESS: If you answered other than 'No' above, enter the Custom Office S/O Order Header UDF to use for the email address.



When using UDF for Fax transmission enter as E-mail format; 1#####@aaaaa.com where '#####' is the Fax number and 'aaaaa' is the domain address for your online fax service.

Role Maintenance

The following task has been added to Sales Order, Miscellaneous Tasks:

- Purge Sales Order PDF

The following task has been added to Sales Order, Setup:

- Extended Solution Setup

The following task has been added to Library Master, Inquiry:

- Customer Viewer

The following Security Event has been added to Sales Order:

- User to Delete S/O Order PDFs (SO-1463)

Users who are authorized to run any of the above should be granted permissions for the prospective tasks and security events. Please review your security setup in Role Maintenance and make appropriate changes.


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

Implementation Guidelines

If you are using this Extended Solution in conjunction with LM-1019: *Paperless Office: Electronic Forms Delivery* it is suggested that you do a 'trial run' in Test Mode before sending your sales order PDF files electronically. Please refer to the LM-1019 manual for details.

Extended Solutions

Operation*Paperless Office Processing*

This Extended Solution adds a Paperless Office button to certain screens. It looks like this . When you click this button, you will have access to the Paperless Office options for that screen.

S/O Order Entry

In S/O Order Entry, if you specified a Sales Order Custom Office UDF to hold the email address and multiple email addresses are required, you will need to enter them using semicolon between entries.

Sales Order Printing

The Sales Order Printing screen (Figure 2) has been modified with the addition of a 'Produce Orders For' drop box. The options available and the results they produce are:

Produce Orders For	E-mail Customer	Print Customer	LM-1019 Option
Print All	Printed	Printed	No
E-mail Customers Only	PDF, E-mail	Nothing	Yes
Print Customers Only	Nothing	Printed, PDF	No
Print All and E-mail Customers	Printed, PDF, E-mail	Printed, PDF	Yes
Print or E-mail Customers	PDF, E-mail	Printed, PDF	Yes
Print All, PDF All	Printed, PDF	Printed, PDF	No
PDF All	PDF	PDF	No

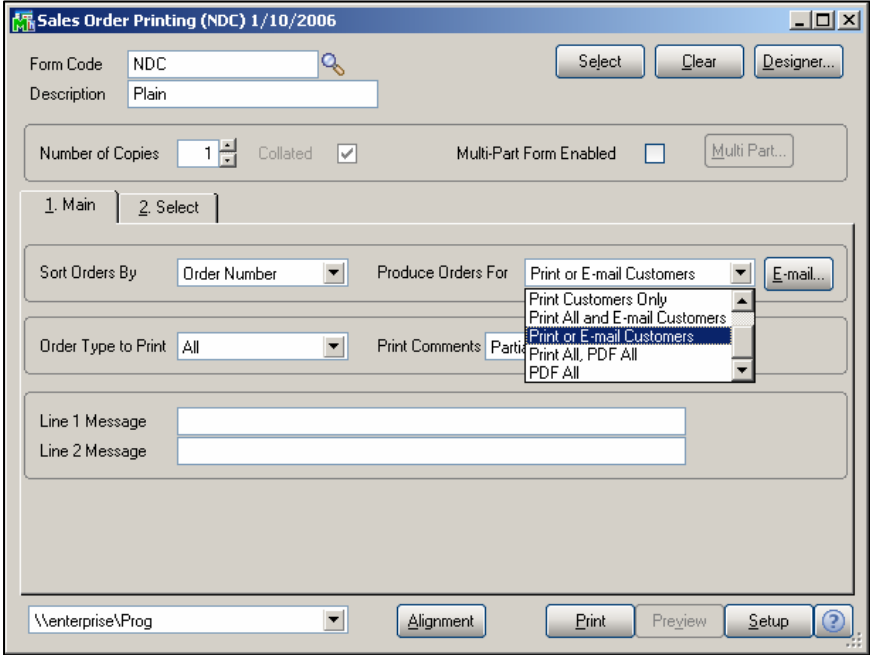


Figure 2

If one of the E-mail options is selected, the 'E-mail' button will be enabled. Click the button to specify the E-mail Subject, From E-mail address, and whether you want to enable test mode (Figure 3). If you want the actual Order Number to appear in the subject line of the e-mail, enter the token <<DOC_#>> in your subject line text. The actual document number will be substituted in its place.



The LM-1019 default From E-mail Address will NOT default into the 'From Address' field. To specify a default From E-mail Address, you need to set up a new form code (ie. not 'STANDARD') and specify a 'From E-mail Address' for that form code. It will be saved as part of the form settings. It is the same for E-mail Subject. If you want to use the 'STANDARD' form code, you will have to enter the From E-mail Address and Subject every time.

Figure 3

The document naming convention for a Sales Order PDF file will be:

Customer Number + Source + Order No + Order Type + Order Date* + Seq#

*Although the Order Date is included in the naming convention, it does not make that document unique. If the Order Number is reused for the same Customer, the previous order will be overwritten.



The use of illegal characters (characters not allow by Windows) in Customer or Vendor names will create undesirable results when generating PFD documents.

Sales Order Quick Print has also been modified to allow you access to the 'Produce Orders For' options (Figure 4).

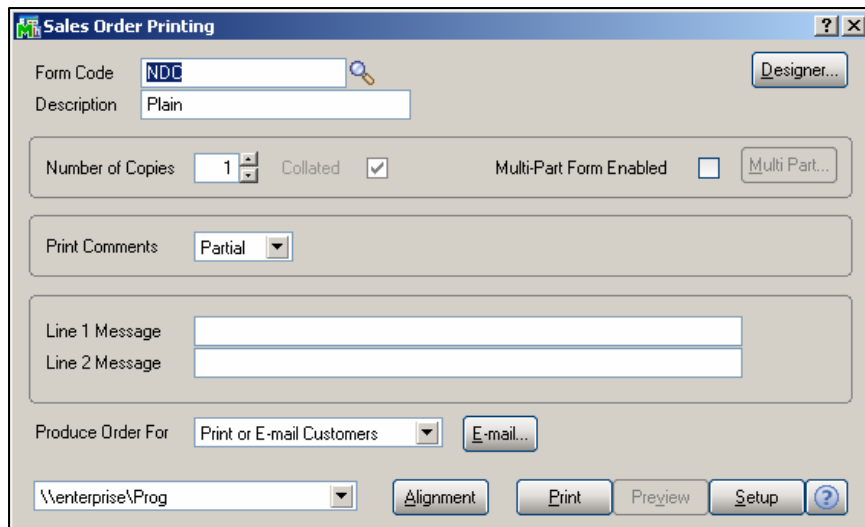


Figure 4

Sales Order Viewer

There are two options for accessing your documents. The first is via the Paperless Office button on the 'S/Os' tab of Customer Maintenance (Figure 5).

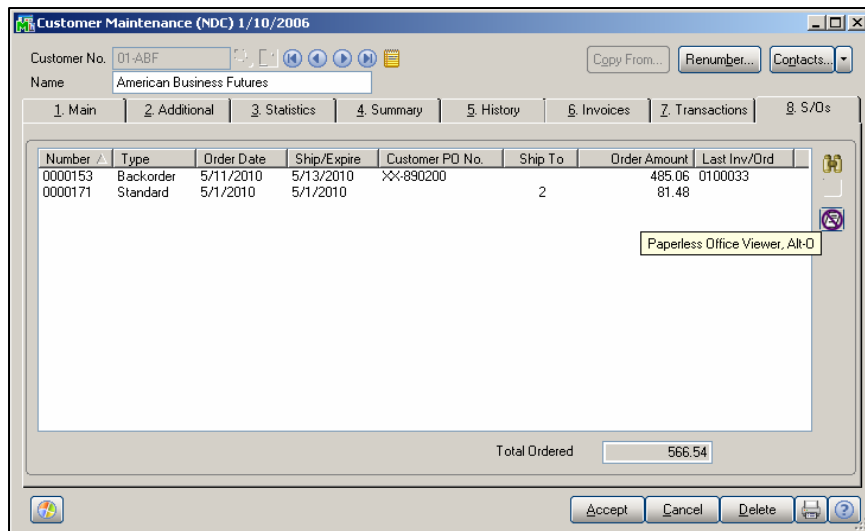


Figure 5

When this button is clicked, you will be presented with the Viewer which lists the Sales Orders PDF Files for this Customer (Figure 6a).

Extended Solutions

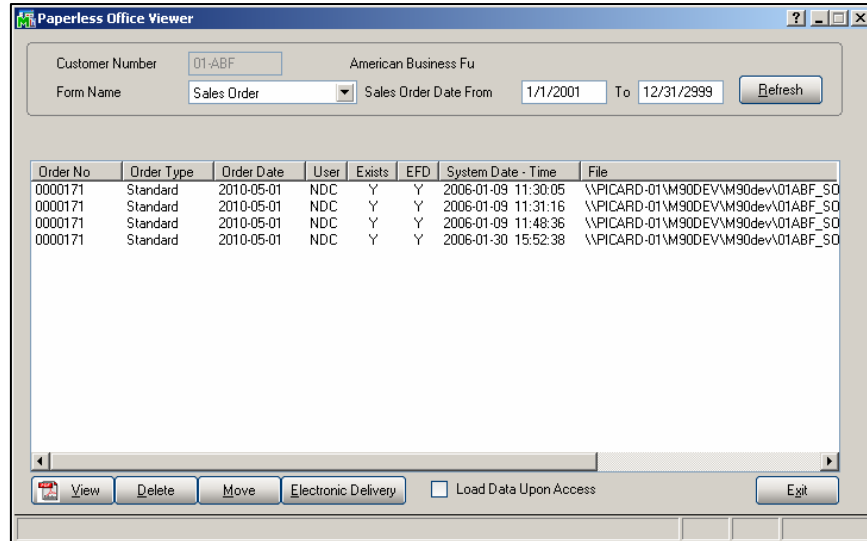


Figure 6a

The second is via a global Customer Viewer available under the Library Master, Paperless menu (Figure 6b).

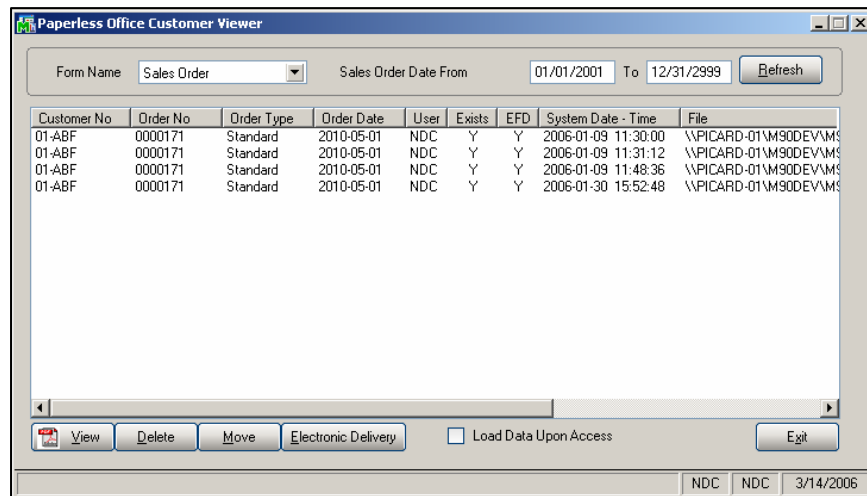


Figure 6b

You can define a range of Order Dates you wish to view. This range of dates will default the FROM to 30 days prior to the current system date and the TO date to 12/31/2999. Click the 'Refresh' button each time you change the dates to update the screen.

Extended Solutions

The following columns of data will be presented:

Customer Number

Order Number

Order Date

Order Type

User: The User Code who printed the order.

Exists: Does the PDF document still exist in the file?

EFD: Was electronic delivery performed? Y/N if LM-1019 installed. Will be blank if LM-1019 is not installed.

System Date and Time: The date and time on the user's workstation when the PDF document was generated.

File: The directory and filename of the PDF document, recorded at the time the document was created.

LOAD DATA IN VIEWER UPON ACCESS: Check this box to cause the Paperless Office Viewer to load automatically with all document records upon access. Every time a change is made to the form name or the date range, the list box will be auto refreshed.

Leave it unchecked to force the user to specify the form and the date range then click the 'Refresh' button. Only records relating to the specified selections will load in the list box. You must click 'Refresh' to reload the list box each time the form or date range is changed. The last option selected for the Viewer will be remembered. This option is Viewer specific not form specific.

The Viewer will display in Customer Number/Order Number order, with the top entry highlighted. You can click on any of the columns to resort the data.

There will be a 'View' button with an Adobe icon located on the bottom. When clicked, it will load the Adobe Acrobat Reader with the document on the highlighted line.

You can shift/click to highlight multiple entries, which can apply to any of the following three buttons: Delete, Move, or Electronic Delivery:

Deleting Documents

The 'Delete' button will only be available to Users associated with the Security Event, 'Allow User to Delete S/O Order PDFs'. When clicked all selected records and associated PDF documents will be deleted.

Moving Documents

When the 'Move' button is clicked with documents highlighted, you will be prompted for the new path for the documents (Figure 7).

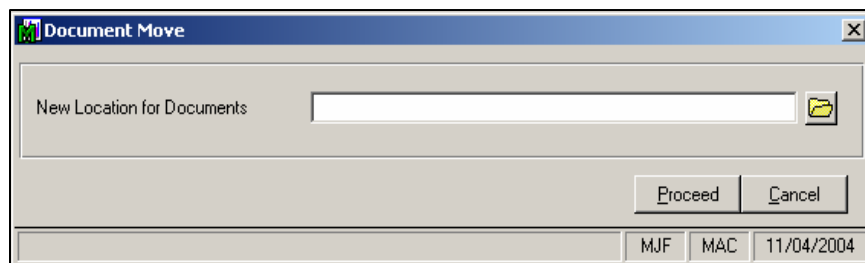


Figure 7

After you have selected the directory location for the documents press Proceed to begin the Move process. If you have not selected any documents in the viewer, then it is assumed that you want to move all of the documents currently listed in the Viewer. You will be warned and asked if you want to continue (Figure 8). To move all the documents currently displayed in the viewer press 'Yes'.



Due to interpreter limitations, you should select no more than 100 documents at a time for moving.

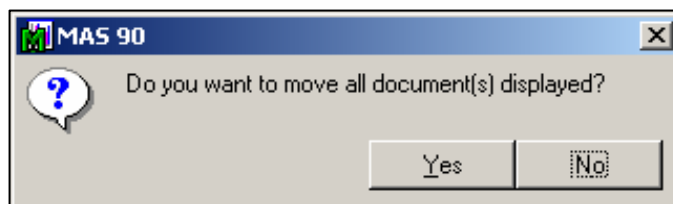


Figure 8

The program will attempt to move all of the selected documents that it can, and will reset the path for those documents. If 'Exist'= No then no document will be copied, but the path will be changed because this assumes it has already been moved.

Electronic Delivery

If LM-1019 is installed and enabled, an 'Electronic Delivery' button will be available. When this button is clicked, you will be prompted for the 'From' e-mail address, e-mail subject, and whether or not you want to activate test mode (Figure 9). The 'From' e-mail address will be saved by form type. The e-mail subject and test mode settings will not be saved. The viewer will e-mail and/or fax the selected documents according to the customer's current Delivery Options (refer to the AR CUSTOMER DELIVERY OPTIONS section of the LM-1019 manual for details). This button will NOT print the order.



Figure 9

Sales Order History Inquiry

Sales Order History Inquiry has a view button which brings up the last copy of the sales order PDF file, if one exists (Figure 10).

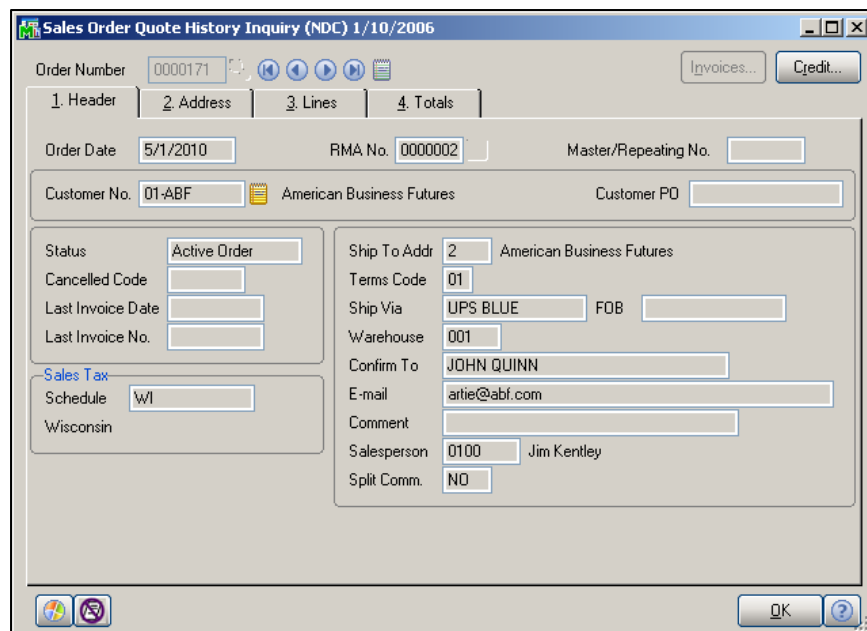


Figure 10

Purge Sales Order PDF

The Utilities menu has a new option to purge all sales orders PDF files by a single date (Figure 11). Only PDF files without a matching Order Numbers in the Sales Order Header File which were created on or before the specified date will be deleted.

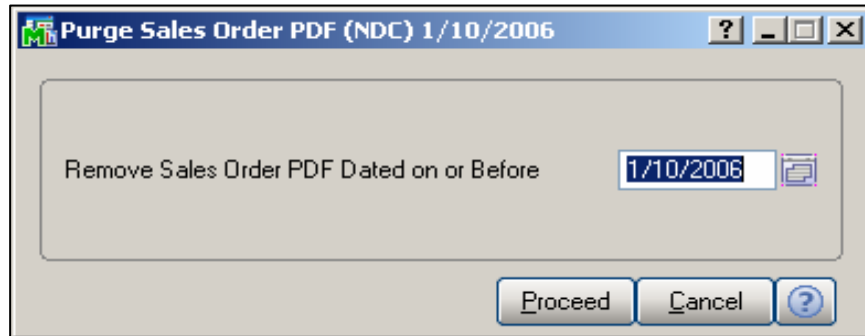


Figure 11

Delete and Change Customers Utility

The Customer Renumber/Merge/Delete Utility, as well as the 'Re-number' and 'Delete' options in Customer Maintenance, have been modified as follows:

When you renumber a customer, then all records in the log file will have the Customer Number changed to be the new Customer Number. The Filename, which contains the original Customer Number, will be unchanged.

When you merge customers, any records in the log file referencing the 'From Customer Number' will be changed to the 'To' Customer Number. The Filename, which contains the original Customer Number, will be unchanged.

When you delete a customer, no changes will be made to the PDF document or the records in the file.

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>Description</i>	<i>Field</i>
AR_CustomerPDFLog_001	Customer PDF Log File	All fields
SO_SalesOrderWrk	Sales Order Work File	Print_001 PDF_001 Email_001

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

SAGE MAS 90

SAGE MAS 200

Extended Solutions

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 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 to the standard operation of 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

© 2005 Sage Software, Inc. All rights reserved. Sage Software, MAS 90 and MAS 200 are registered trademarks or trademarks of Sage Software, Inc. All other trademarks are the property of their respective owners.

 LLC The Premier Provider of Effective Business Software Solutions

Regional Offices

Orange County, California 23161 Mill Creek Drive Laguna Hills, California 92653 Phone: (949) 583.9500 Toll Free: (800) 425.9843 Fax: (949) 583.0649 www.blytheco.com	Atlanta, Georgia 1100 Johnson Ferry Road, Ste. 450 Atlanta, Georgia 30342 Phone: (404) 841.6240 Toll Free: (800) 455.1368 Fax: (404) 841.6243 solutions@blytheco.com
---	---

Sage Software Business Partner of the Year

Complete Sage Software Solutions
Sage MAS 500 • Sage MAS 200 • Sage MAS 90
Sage BusinessWorks • Sage SalesLogix CRM • ACT! by Sage
Sage ABRN HRMS • Sage FAS • Sage MIP Fund Accounting & Fundraising

Offices in these cities & states:
Atlanta, GA • Chicago, IL • Los Angeles, CA • Orange County, CA • Tampa, FL
Colorado • Minnesota • Missouri • New Jersey • Ohio • Oklahoma • Pennsylvania
• South Carolina • Tennessee • Texas • Washington

National Presence - Local Touch