
Enhanced Promise Date by Line Item

SO-1018

Overview

This Extended Solution adds additional functionality to the Promise Date field in the lines section of Sales Orders and Sales Order Invoices.

- You can refresh existing lines with a change to the header Ship Date
- The Promise Date is added to the S/O Invoice grid in the same manner as Order Entry
- Sales Orders can be sorted by Promise Date or Order Date on the Inquiry tab of Inventory Maintenance and Inventory Inquiry.
- Picking Sheet selection has been modified with a range of Promise Dates

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

Extended Solutions

- Merge Installation Files
- Extended Solutions Setup options

Custom Office

If you customize your MAS 90 MAS 200, then you must run the Update Utility *every time* you install a Sage Software 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).

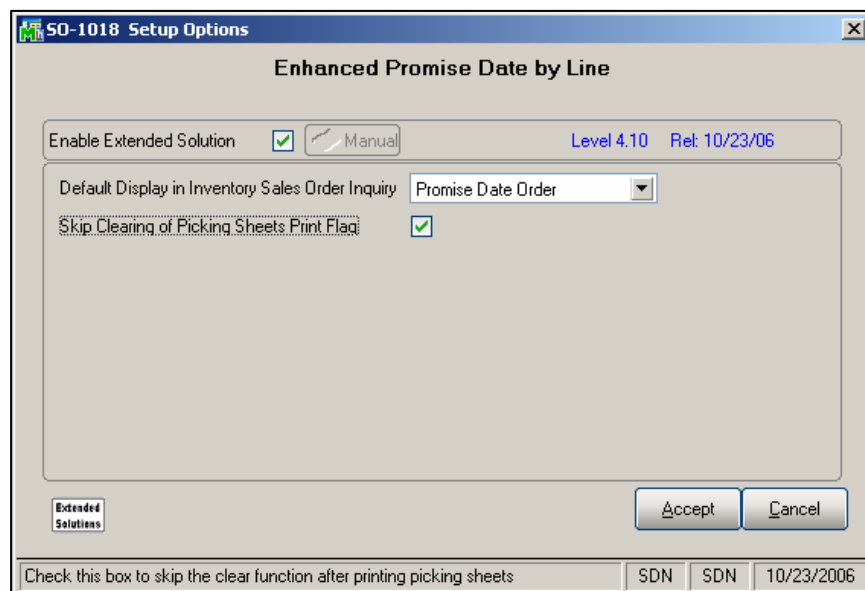


Figure 1

Answer the following prompts:

DEFAULT DISPLAY IN INVENTORY SALES ORDER INQUIRY: Select 'Promise Date Order' or 'Sales Order Number Order' as the default display setting you wish to see on the Inventory Maintenance, Inquiry tab with the Sales Orders option checked.

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SKIP CLEARING OF PICKING SHEET PRINT FLAG: If you check this box and enter a starting and ending promise date range (other than the default) during Picking Sheet Printing Selection, the clearing process will be skipped after the Picking Sheets have been printed.

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

Operation

Sales Order and Sales Order Invoice Data Entry

During Sales Order and Sales Order Invoice data entry, after a change is made to the standard Ship Date, a new prompt will appear asking if you wish to update the line item Promise Date with the new Ship Date (Figure 2). You may select Yes, No, or Match. If you select 'Yes,' all line item Promise dates will be updated. If you answer 'No,' no line items update will occur. If you answer 'Match,' then only those lines items which had a date matching the old ship date will be updated.

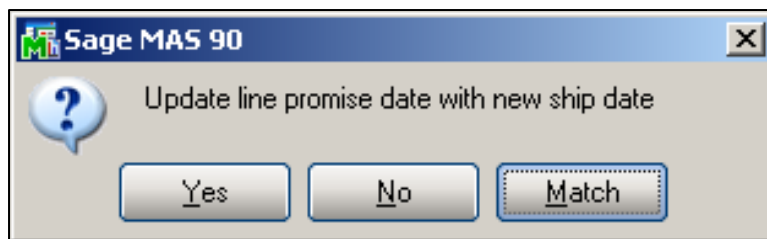


Figure 2

In Sales Order Invoice Data Entry, the Promise Date will now be available in the grid for invoice lines. For new lines, the Promise Date will default in the same manner as it does in Sales Order Entry lines.

Inventory Maintenance/Inquiry Sales Order Inquiry

The Inquiry tab of Inventory Maintenance and Inventory Inquiry has been modified. You may display the Sales Orders in Promise Date or Order Number order (Figure 3). The screen will default based on what was selected in Setup, however you can toggle between the two by clicking the 'Sort' button.

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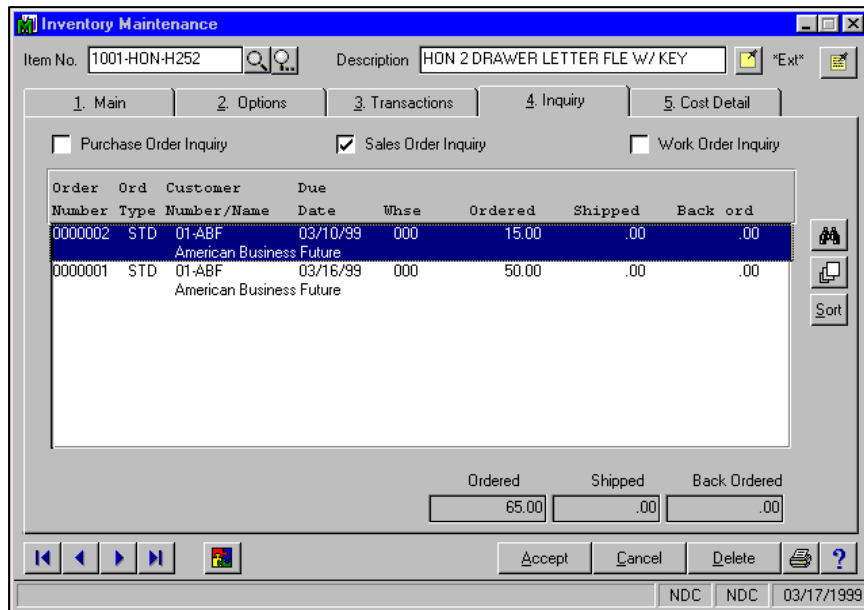


Figure 3

If you elect to sort by Promise Date, the 'Order Date' column will be relabeled 'Due Date.' Sales Orders will be listed from the oldest to the most recent. Any line items without a date will sort to the top.

A new option, 'Sort Order,' has been added under Search Options (Figure 4). You may change your sort by selecting this option.

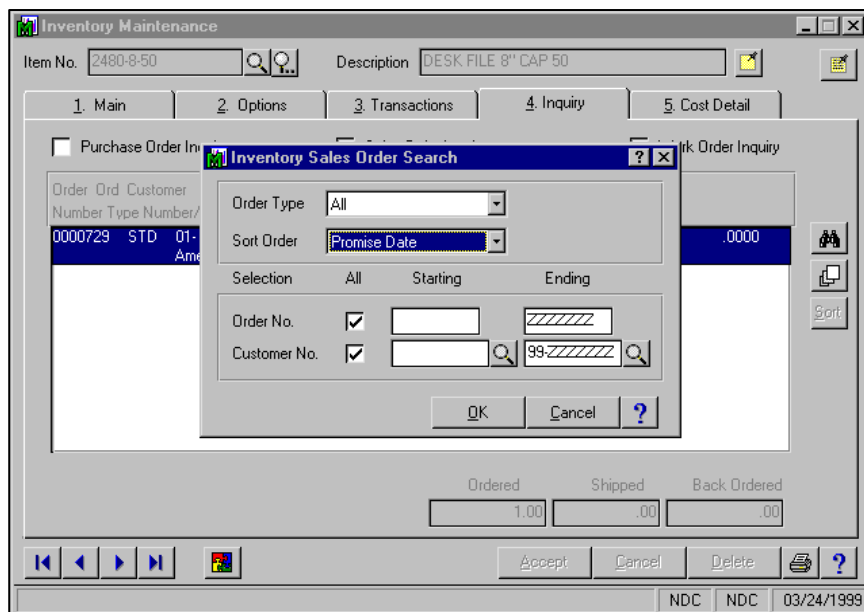


Figure 4

Picking Sheet Printing

With this Extended Solution, Sales Order Picking Sheets can be selected by a range of Line Item Promise Dates (Figure 5).

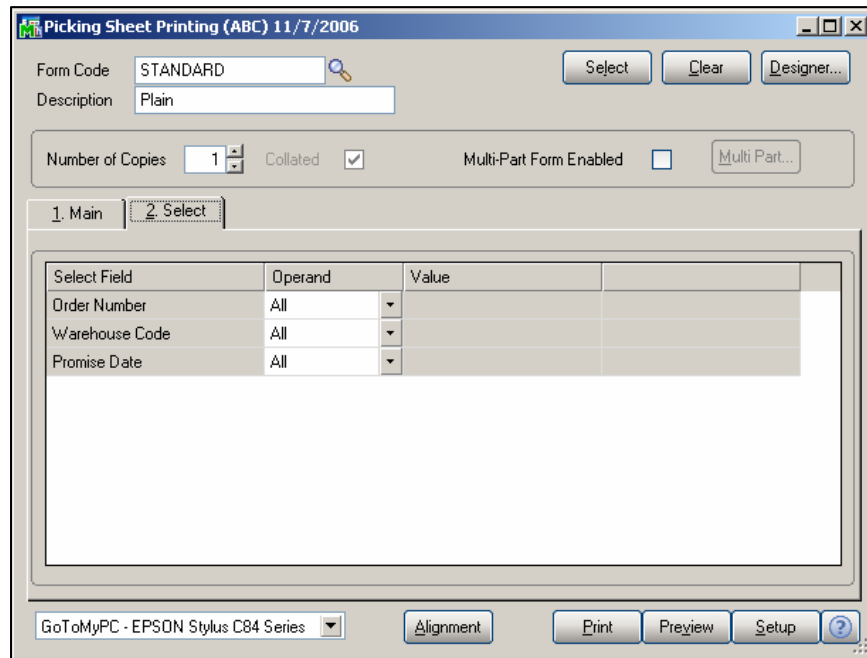


Figure 5

Only lines with a Promise Date within the selected range will print on the Picking Sheets. If you selected to Skip Clearing of Picking Sheet Print flag in Setup, the Print Picking Sheets flags will remain checked for the selected orders.

What's New

With the 11-7-06 release:

- Converted to Business Framework
- Changed title to 'Enhanced Promise Date by Line Item'
- Removed the following setup options:
 - Auto Skip Tab Stop
 - Enter Promise Date In Header
 - Default Promise Date From Previous Line
- Removed the following reports:
 - On Time Promise Report
 - Promise Date Report

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

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