
Enhanced Shipping Data Entry

SO-1404

Overview

This Extended Solution to the Sales Order module adds four new options:

- To remove the restriction and/or warning against processing Sales Orders in Shipping Data Entry when a Customer is on Credit Hold or has exceeded his or her Credit Limit.
- To not recalculate freight when a specified Sales Order Header Customer Office UDF is set to a particular value
- To issue audible alerts any time the user over ships a line or selects an item that is not on the order
- To default all lines to the color of **red**, and then to change to **black** as they are fully shipped.

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.sagesoftware.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:

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

Setup

Once the disk is installed, you will need to access the Sales Order options screen. After the standard MAS 90 MAS 200 option screens have been displayed, a Setup screen for this Extended Solution will appear. Check the 'Enable Extended Solution' box to activate this Extended Solution (Figure 1). The manual for this Extended Solution, if it has been installed, 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).

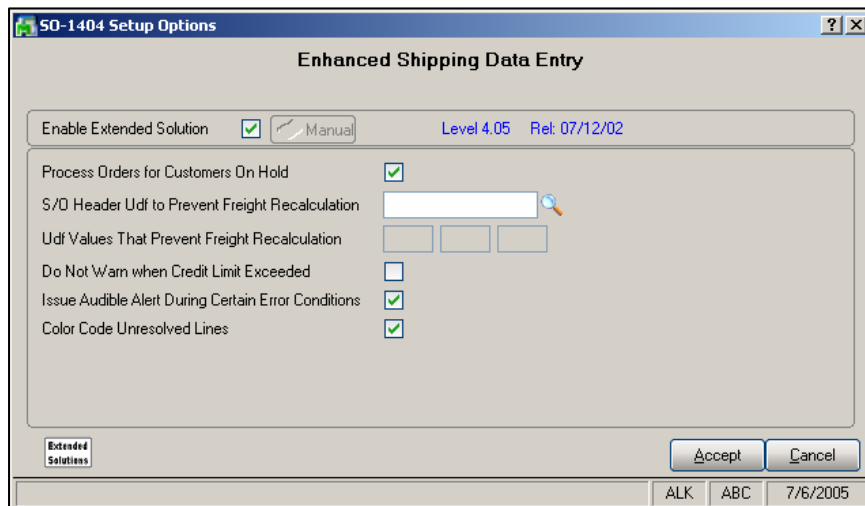


Figure 1

Answer the following prompts:

PROCESS ORDERS FOR CUSTOMERS ON HOLD: Check this box to process orders for customers on hold.

S/O HEADER UDF TO PREVENT FREIGHT RECALCULATION: Define one drop-box type Sales Order Header UDF.

The following question is only available (and must be answered) if you have specified a UDF to prevent freight recalculation.

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UDF VALUES THAT PREVENT FREIGHT RECALCULATION: Define up to three values of the specified UDF that are the flag to not recalculate freight. Only one value is required to leave the enable screen.

DO NOT WARN WHEN CREDIT LIMIT EXCEEDED: If you check this box, then during Shipping Data Entry during the Credit Checking process, if Over Limit is the ONLY credit problem found, the Shipper will no longer be presented with the window 'Customer Credit Limit Exceeded. Do you want to continue?'.

ISSUE AUDIBLE ALERT DURING CERTAIN ERROR CONDITIONS: If you check this box, the program will issue an audible alert any time the user over ships a line or selects an item that is not on the order. These alerts will be in addition to the warning windows that currently pop up.

COLOR CODE UNRESOLVED LINES: All lines will default into Shipping Data Entry in **red**, and as they fully shipped, they turn to **black**.

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

Operation

If you checked the Setup option, 'Process Orders for Customer on Hold,' then the restriction against processing an Order for a Customer who is on Credit Hold is removed. If the Order status is 'Hold,' the user will still receive a warning message.

If you checked the 'Do Not Warn When Credit Limit Exceeded' box in Setup, if Over Limit is the ONLY credit problem found, the Shipper will no longer be presented with the window 'Customer Credit Limit Exceeded. Do you want to continue?'.

If you specified 'UDF Values That Prevent Freight Recalculation' in Setup, the Freight will default from the order and not recalculate when the Order's UDF has one of the non-blank values specified in Setup (This will work in conjunction with SO-1409: *Shipping Data Entry Integration with SO-1099*).

If you checked the Setup option 'Issue Audible Alert During Certain Error Conditions,' the program will issue an audible alert any time the user over ships a line or selects an item that is not on the order. These alerts will be in addition to the warning windows that currently pop up.



The 'Audible Alert' is the SHIPPING_ALERT.WAV file. You are responsible for finding the .wav file you want to play, copying that file to the SOA directory (on the server and the workstation if CS), and naming it SHIPPING_ALERT.WAV.

If you checked the Setup option 'Color Code Unresolved Lines,' all lines will default into Shipping Data Entry in **red**, and change to **black** as they are fully shipped (Figure 2).

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Shipping Data Entry

Shipper ID: 1 Ship Date: 09/18/2003 Order No.: 0000380
 Shipping No.: 0100265 Ship Status: Shipped SO Created By: SCA
 Customer No.: 01-ABF Artie Johnson Inc.

Line	Item Number	U/M	Whse	Description	Ordered	Shipped	Back Ordered
1	1001-HON-H252	EACH	001	HON 2 DRAWER LETTER FLE W/D LK	1.000	1.000	0.000
2	1001-HON-H252LK	EACH	001	HON 2 DRAWER LETTER FLE W/LCK	1.000	1.000	0.000
3	1001-HON-H254	EACH	001	HON 4 DRAWER LETTER FLE W/D LK	1.000	0.000	SHIP
4	1001-HON-H254LK	EACH	001	HON 4 DRAWER LETTER FLE W/LCK	1.000	0.000	SHIP

Quick Line: Ship Remaining Auto Increment Current Package: 0005 #. #

Quick Print... Udf Accept Cancel Delete ?

Enter Quantity Shipped NDC ABC 09/29/2003

Figure 2

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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