
Shipping Data Entry Integration with SO-1099

SO-1409

Overview

This Extended Solution to the Sales Order module allows you to access S/O Invoices from Shipping Data Entry.



Sage Extended Solution SO-1099: *'On Demand' Sales Order Fill Report* must be installed and enabled for this Extended Solution to function. Additional functionality is available if you have Extended Solution SO-1014: *User Defined Line Fields for Sales Order* 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

Extended Solutions

- Unlock 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 this Extended Solution.

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).

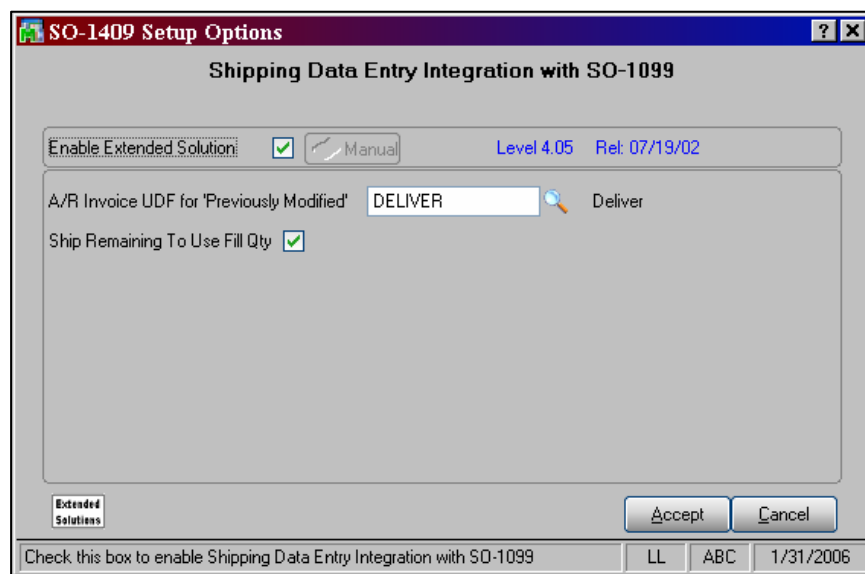


Figure 1

Answer the following prompts:

A/R INVOICE UDF FOR PREVIOUSLY MODIFIED: Specify a checkbox type UDF that the program will set to checked upon exit of a Shipping Entry (see *Operation* below).



This UDF must be setup with a default of unchecked and it should *not* be added to any screens via Customizer.

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SHIP REMAINING TO USE FILL QTY: Check this box to have the Qty Shipped default from the Fill Qty field when you click the Ship Remaining button.

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

Operation

This Extended Solution modifies Shipping Data Entry to allow S/O Invoices to be accessed (Figure 2). When an invoiced Sales Order is selected:

- The Invoice Number will appear in the Shipping No. field
- A new field called Fill Quantity will be located to the right of the Back Order button. It will contain either the value in the SO-1099 specified SO-1014 UDF for Fill Qty, or if the installation does not have SO-1014, then it will be the Fill Qty as stored in the developer string
- The Back Ordered column of the list box has been replaced with Fill Quantity

Line	Item Number	U/M	Whse	Description	Ordered	Shipped	Fill Quantity
1	8953	EACH	001	UNIVERSAL 3 1/2" SSDD FLEX DSK	10.00	0.00	10.00

Figure 2

Upon initial entry of a Shipping Entry which exists in Invoice entry, the value in the Qty Shipped field will be set to zero.

If you checked 'Ship Remaining to Use Fill Qty' in setup, then clicking the Ship Remaining button will set the value of the Qty Shipped for all lines to equal the line's Fill Qty field.

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Upon exit of a Shipping Entry for an Invoiced Order: the values in the Shipping Data Entry Qty Shipped fields will be updated to the Invoice and, if you specified a Previously Modified UDF in setup, that UDF will be checked.

Upon subsequent access of a Shipping Entry for an Invoiced Order where there exists a Previously Modified UDF, and it is checked, the Shipped Qtys will retain any value currently stored in the Qty Shipped field for the line.

Subsequent access of a Shipping Entry for an Invoiced Order where no UDF was specified, the values in the Qty Shipped fields on the Shipping Entry *will be set to zero*. This allows you to start over by exiting the entry and returning to the entry again.

Selecting to 'Delete' a Shipping Entry will delete the SO-1099 generated Invoice.

What's New

With the 1-10-06 release:

- Added two options to the setup screen:
 - Ship Remaining to Use Fill Qty
 - A/R Invoice UDF for Previously Modified

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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