
Sort Field and Customer Type Validation

AR-1091

Overview

This Extended Solution to the Accounts Receivable module allows you to specify the field length and Setup validation values for the standard MAS 90 MAS 200 A/R Customer fields 'Sort Field' and 'Customer Type.' A Setup Utility is provided to create and maintain values for validation to be used during A/R Customer Maintenance.

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

Once the disk is installed, you will need to access the Accounts Receivable Setup menu option 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).

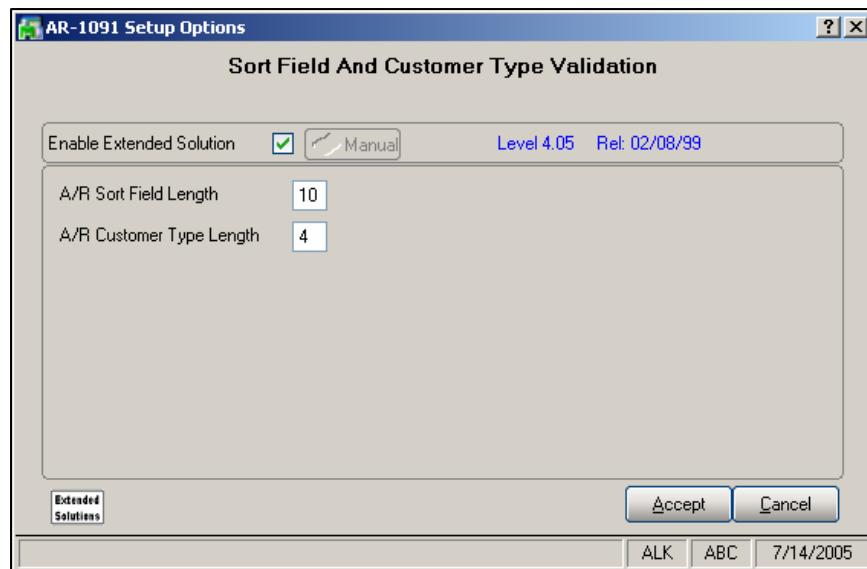


Figure 1

Answer the following prompts:

A/R SORT FIELD LENGTH: Enter the field length you want to use for the A/R Sort field. This field has a maximum length of ten.

A/R CUSTOMER TYPE LENGTH: Enter the field length you want to use for the A/R Customer Type field. This field has a maximum length of four.



Note that if you do not specify a field length for either 'Sort Field' or 'Customer Type,' no validation will occur and no lookup will be available during Customer Maintenance for that field. In addition, the Validation Maintenance program will no longer prompt you for a field type, but will instead go directly to field validation entry.

Extended Solutions

Extended Solutions Setup will be added to the Accounts Receivable Main Menu as a Setup Option task. 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.

Operation

The Validation Field Maintenance program maintains sort field and customer type values to be used for validation purposes in A/R Customer Maintenance (figures 2 and 3). In addition, the maintenance program provides a print option. A/R Customer Maintenance has been changed to accept, at the field size specified, only values from the Sort Field and Customer Type validation file. Lookup is available at the Sort Field and Customer Type prompts in both Validation Field Maintenance and A/R Customer Maintenance (Figures 4 and 5).

If the new field size you select is smaller than the existing size, the Setup program will verify that all existing Sort Field/Customer Type validation fields are equal to or smaller than the new size selected. If a validation field is found that is larger than the new field size, a warning message will be displayed informing you must change any existing validation records to match the new size selected before the field size change can take place (Figure 6). This program *does not* check all Customer files when changing the size of the sort field or customer type.

The screenshot shows a Windows-style dialog box titled "Validation Field Maintenance". It contains the following elements:

- Customer Masterfile Field:** A dropdown menu currently showing "Sort Field".
- Customer Sort Field:** A text input field with a magnifying glass icon to its right, indicating a lookup function.
- Description:** A larger text input field.
- Buttons:** Four buttons at the bottom: "Accept", "Cancel", "Delete", and a print icon.
- Status Bar:** Located at the bottom right, it displays "AR", "NDC", and the date "01/29/1998".

Figure 2

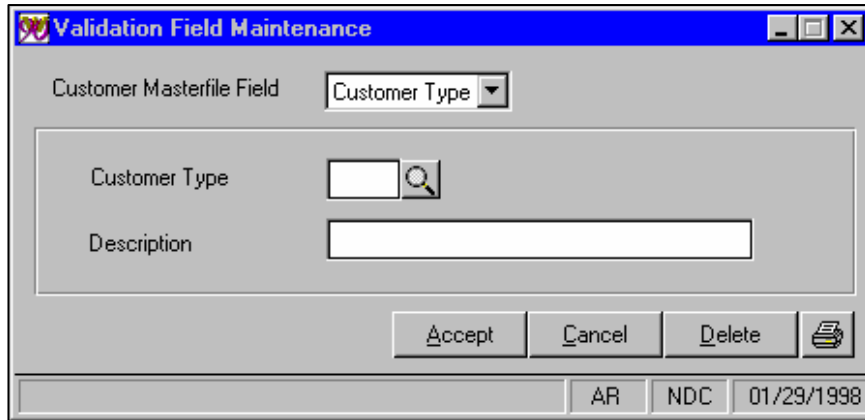


Figure 3

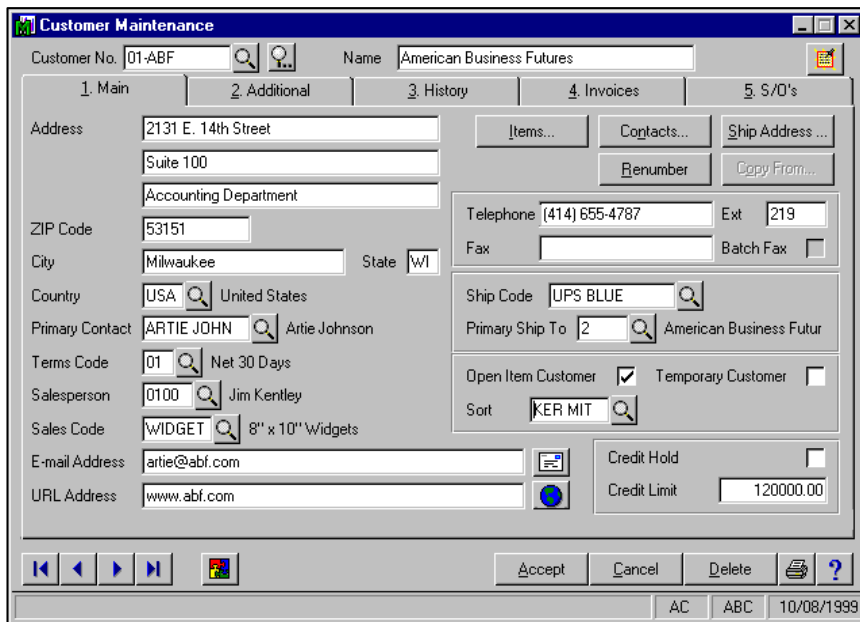


Figure 4

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Customer Maintenance

Customer No. 01-900000 Name American Business Futures

1. Main 2. Additional 3. History 4. Invoices 5. S/O's

Customer Type T2 Print Dun Message

Price Level 1 Statement Cycle M

Sales Tax

Tax Exempt Number

State WI Only MIL Loc MIL

Credit Card Information

Number

Cardholder Name

Expiration Date

Payment Type

Discount Rate .000%

Fin Charge Rate 1.500%

Comment CALLED SMITH FOR CREDIT APPVL

Accept Cancel Delete ?

NDC NDC 01/29/1998

Figure 5

AR-1091 Setup Options

A/R Sort Field And Customer Type Field Validation

Enable Enhancement Level 3.20 Rel: 03/04/98

A/R Sort Field Length 5

MAS 90 For Windows

I have detected that the size of Sort field Validation record 1234567890 is larger than the new field size selected. This field and any others that exceed the new field size must be changed using Validation Field Maintenance before the Sort field length may be changed.

OK

Accept Cancel

AR NDC 01/29/1998

Figure 6

Report Master/Visual Integrator

The files listed below have been added or changed in the Data Dictionary by this Extended Solution for Visual Integrator purposes.

Extended Solutions

<i>New File:</i>	<i>Field:</i>
AR.SUB_MST	RECORD_TYPE
	FIELD
	DESCRIPTION

The Data Dictionary may contain other files and data fields that are not available without their corresponding Sage Software Extended Solutions installed.

Note: The Report Master module is not supported in MAS 200 SQL.

Crystal Reports

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

<i>File:</i>	<i>Fields:</i>
AR_FM_SubsiaryField	All Fields

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

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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