
Drop Ship Orders From Master Orders

PO-1159

Overview

This Extended Solution to the Purchase Order module allows you to create a Drop Ship Purchase Order from a Sales Order and to also reference a Master Purchase Order to thereby relieve quantities on a Master Order via Drop Ships.



Additional functionality is available if CM-1001: *Enhanced Custom Office User Defined Fields* is 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

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Setup

Once the disk is installed, you will need to access the Purchase Order options screen. After the 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).

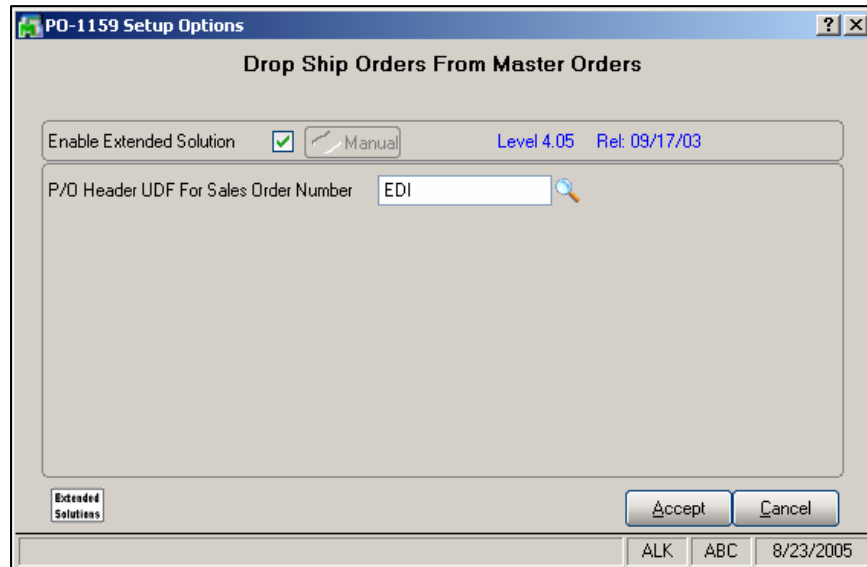


Figure 1

P/O HEADER UDF FOR SALES ORDER NUMBER: Enter one Custom Office P/O Header UDF to hold the Sales Order Number.

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

Operation

With this Extended Solution installed, the program will replace the S/O Number field, which is currently available with Drop Ship type Purchase Orders, with 'Master Order Number' (Figure 2). When a Master Order has been defined, the Drop Ship's order creation process will be the same as that of a standard Purchase Order that was created from a Master. And as the ROI is performed on the Drop Ship Purchase Order, it will update the Master Order quantities the same as a Standard Purchase Order would.

Additionally, all Drop Ship-type Purchase Orders, whether a Master Order is referenced or not, will have access to 'Sales Order' Number field via the P/O Custom Office UDF entered in Setup. You can type in a valid Sales Order Number. You can look up a Sales Order Number

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via an ALE into the open Sales Order file if CM-1001 is installed and a Sales Order type Custom UDF has been defined. When a Sales Order Number is specified, then the Ship To Address on the P/O Address tab will be updated with the Ship To Address from the Sales Order. Any time the Sales Order Number is changed, the Ship To Address information will change. Note: to prevent the Ship To Address from being overridden by the Master Order, the Sales Order Number must be entered in the UDF **after** the Master Order Number has been defined.

The screenshot shows the 'Purchase Order Entry' window in SAGE MAS 200. The window title is '* Purchase Order Entry'. It has a top navigation bar with tabs for '1. Header', '2. Address', '3. Lines', '4. Totals', and 'User ID'. The 'Header' tab is selected. The main area contains various input fields and controls. At the top, there's an 'Order Number' field with '0000090' and a search icon. To the right are buttons for 'Quick Print...', 'Defaults...', and 'Vendor...'. Below this is a row of tabs: '1. Header', '2. Address', '3. Lines', '4. Totals', and 'User ID'. The 'Header' tab is active. Below the tabs, there are fields for 'Order Date' (09/22/2003), 'Type' (Drop Ship), and 'Master P/O'. Below that are 'Vendor No.' and 'Purchase Address' fields, both with search icons. A section on the left contains 'Customer No.', 'Order Status' (New), 'Date Required' (09/22/2003), 'Use Tax' (checkbox), 'On Hold' (checkbox), and 'Print Purchase Order' (checkbox). To the right of this section are 'Ship To Address', 'Terms Code', 'Ship Via' (FOB), 'Warehouse' (000 MAIN WAREHOUSE), 'Confirm To', and 'Comment' fields. At the bottom right of the main area are 'Telephone', 'Ext', 'Fax', and 'Batch Fax' fields. A status bar at the very bottom shows 'MJF MJF 09/22/2003'.

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.

