
Paperless Office: Purchase Orders

PO-1165

Overview

This Extended Solution to the standard MAS 90 MAS 200 Purchase Order module prints purchase orders, both graphical and non graphical forms, to PDF files.



Additional functionality is available if LM-1019: *Electronic Forms Delivery* is also 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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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 Purchase 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:

DIRECTORY: Select a directory where the PDF documents will be placed.



If you are running MAS 200, you should use UNC names, as opposed to drive letters. If you do use drive letter, be certain that the path is valid and points to the same location on both the workstations and the server.

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PRINTING DEFAULT: Select what you would like the printing option default to be: Print and PDF, Print Only, or Electronic Delivery if you have LM-1019: *Electronic Forms Delivery* installed and enabled.

ONLY KEEP LAST COPY: Check this box to keep only one copy of a purchase order. Reprinting a purchase order will overwrite the last copy. Uncheck this option to keep every copy of a purchase order ever printed.



The following options are available only if you have LM-1019: *Electronic Forms Delivery* installed and enabled.

SPECIFY E-MAIL/FAX ON INVOICE: This option will allow you to add an additional email address via a UDF, or to use the Fax Number on the document. Select 'No,' 'In Addition to Customer Masterfile Information,' or 'Instead of Customer Masterfile Information.'

P/O ORDER UDF TO USE FOR E-MAIL ADDRESS: If you answered other than 'No,' above, enter the Custom Office P/O Header UDF to use for the e-mail address.



When using UDF for Fax transmission enter as E-mail format; 1#####@aaaaa.com where '#####' is the Fax number and 'aaaaa' is the domain address for your online fax service.

FROM E-MAIL ADDRESS: Enter the address you wish to have in the From field.

E-MAIL SUBJECT LINE: Enter the text you would like to appear in the Subject field. To have the Purchase Order Number inserted use the token <<DOC_#>>. (For example: Attached is our Purchase Order <<DOC_#>> from ABC Industries.) This token will be replaced with the actual Purchase Order Number.



The installation of the PDF printer will reset the form's length to 066. This will result in an additional piece of blank paper with every printed form. To prevent this, it is suggested that you set the form length to 063.

Role Maintenance

The following Task has been added to Library Master, Inquiry:

- Vendor Viewer

The following Security Event has been added to Purchase Order:

- Allow User to Delete P/O Order PDFs (PO-1165)


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

Implementation Guidelines

If you are using this Extended Solution in conjunction with LM-1019: *Paperless Office: Electronic Forms Delivery* it is suggested that you do a 'trial run' in Test Mode before sending your purchase orders PDF electronically. Please refer to the LM-1019 manual for details.

Operation

Paperless Office Processing

This Extended Solution adds a Paperless Office button to certain screens. It looks like:  When you click this button, you will have access to the Paperless Office options for that screen.

Purchase Order Entry

In Purchase Order Entry, if you specified a Purchase Order Custom Office UDF to hold the EFD e-mail address and multiple e-mail addresses are needed on a Purchase Order, you will need to enter them using semicolon between entries.

Purchase Order Printing

This Extended Solution supports the printing to PDF of both graphical and non-graphical purchase order forms. The Purchase Order Printing screen (Figure 2) has been modified with a Paperless Office button, which, when clicked, will pop up a Paperless Office Processing Options window with these options: Electronic Delivery, Print and PDF, or Print Only. It defaults to the option specified in Setup (Figure 3).

Figure 2

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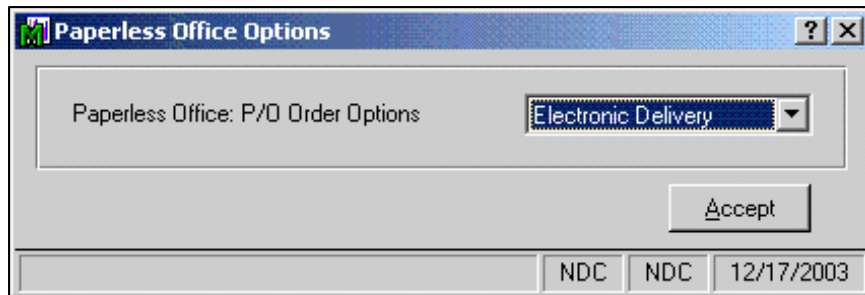


Figure 3

If 'Print' is selected, no PDF files will be created and all processing will be per standard MAS 90 MAS 200.

If 'Print & PDF' is selected, the Extended Solution will create a PDF file for each purchase order in addition to printing it to the specified printer (each purchase order will print as its own print job).

If 'Electronic Delivery' is selected, this Extended Solution will create a PDF for every Purchase Order and electronically deliver it per the Vendor's setup, using the e-mail addresses and fax numbers provided in the Vendor Masterfile or the values in the UDF, if specified in Setup. If nothing has been set up for that vendor, and there is nothing in the UDF, the program will Print and create a PDF file for the document.



Helpful Hint: To review purchase orders without printing them on paper first, print to 'Deferred Print.'

The document naming convention will be:

Vendor Number + Source + Purchase Order Number (including Type) + Order Date* + Seq #

*Although the Purchase Order Date is included in the naming convention, it does not make that document unique. If the Purchase Order Number is reused for the same Vendor, the previous order will be overwritten.



The use of illegal characters (characters not allow by Windows) in Customer or Vendor names will create undesirable results when generating PFD documents.

Quick Print has also been modified to allow you access to Paperless Options.

A record will be created in a log file for each PDF document.

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Order Viewer

The P/Os tab in Vendor Masterfile Maintenance (Figure 4) and Inquiry has been modified with a Paperless Office button. When this button is clicked, you will be presented with a listing of the purchase order PDF files for this Vendor (Figure 5).

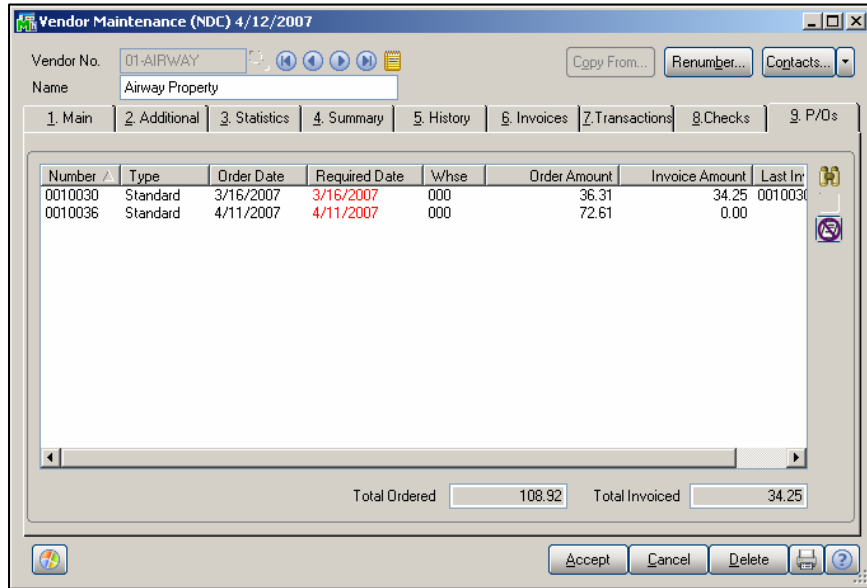


Figure 4

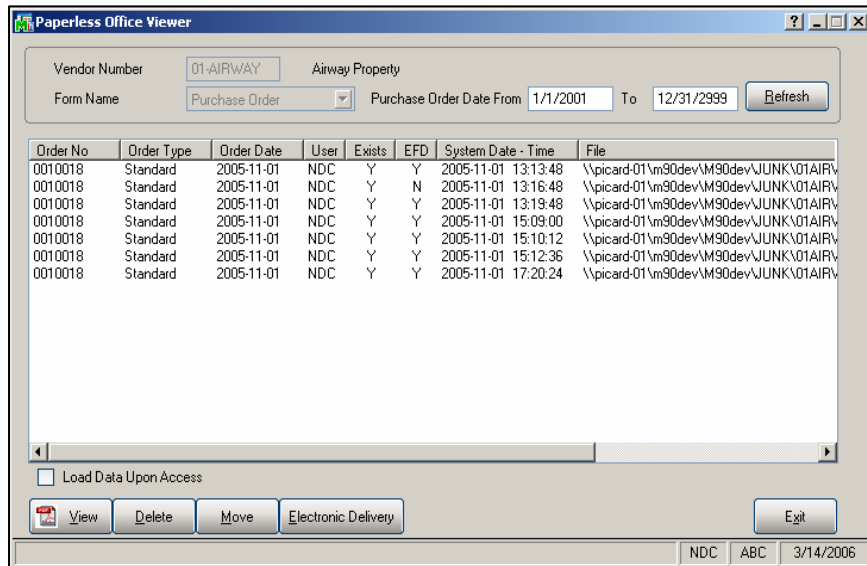


Figure 5



A Global Vendor Viewer was added to Library Master Paperless menu which has similar set up and functionality as the Paperless Office Viewer.

The following columns of data will be presented:

Order Number: The Order Number assigned.

Order Type: Type of order created.

Order Date: Date the order was created.

User: The ID of the user who printed the statement.

Exists?: Does the PDF file still exist?

EFD Performed: Was EFD performed? Y/N or blank, if Extended Solution LM-1019 is not installed.

System Date and Time: The date and time on the user's workstation when the PDF was generated.

File: The directory and filename of the PDF document, recorded at the time the document was created.

LOAD DATA IN VIEWER UPON ACCESS: Check this box to cause the Paperless Office Viewer to load automatically with all document records upon access. Every time a change is made to the form name or the date range, the list box will be auto refreshed.

Leave it unchecked to force the user to specify the form and the date range then click the 'Refresh' button. Only records relating to the specified selections will load in the list box. You must click 'Refresh' to reload the list box each time the form or date range is changed. The last option selected for the Viewer will be remembered. This option is Viewer specific not form specific.

The documents display in Purchase Order Number order, with the top entry highlighted by default. You can click on any of the columns to resort the data.

There is a 'View' button with an Adobe icon located on the bottom. When clicked, it will load the Adobe Acrobat Reader with the document on the highlighted line.

You can define a Date From-To range of Purchase Orders you wish to view. Click the 'Refresh' button each time you change the dates to up date the screen.

The 'Delete' button allows you to delete records from the log file as well as the actual PDF documents from their specified locations. If Setup specifies that only users with Supervisor

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rights can delete PDFs, then this button will only be available if the User ID has Supervisory rights.

If LM-1019 is installed and enabled, there will be an 'Electronic Delivery' button that will e-mail and/or fax according to the Vendor's Setup, as well as any Purchase Order UDF information denoted in the UDF specified. Delivery will respect the Setup question Specify E-mail/Fax on Order (this button will only electronically deliver, it will not print.)

You can Shift/click or Ctrl/click to highlight multiple entries. When the 'Electronic Delivery' button is clicked, you will be prompted to send the highlighted Purchase Orders. When the 'Delete' button is clicked, you will be prompted to delete the highlighted Purchase Orders.

When one document is selected within the viewer a 'Send E-mail Options' window will display allowing you to add/change the email address, the subject, the body, and add an unlimited amount of additional attachments (Figure 6).

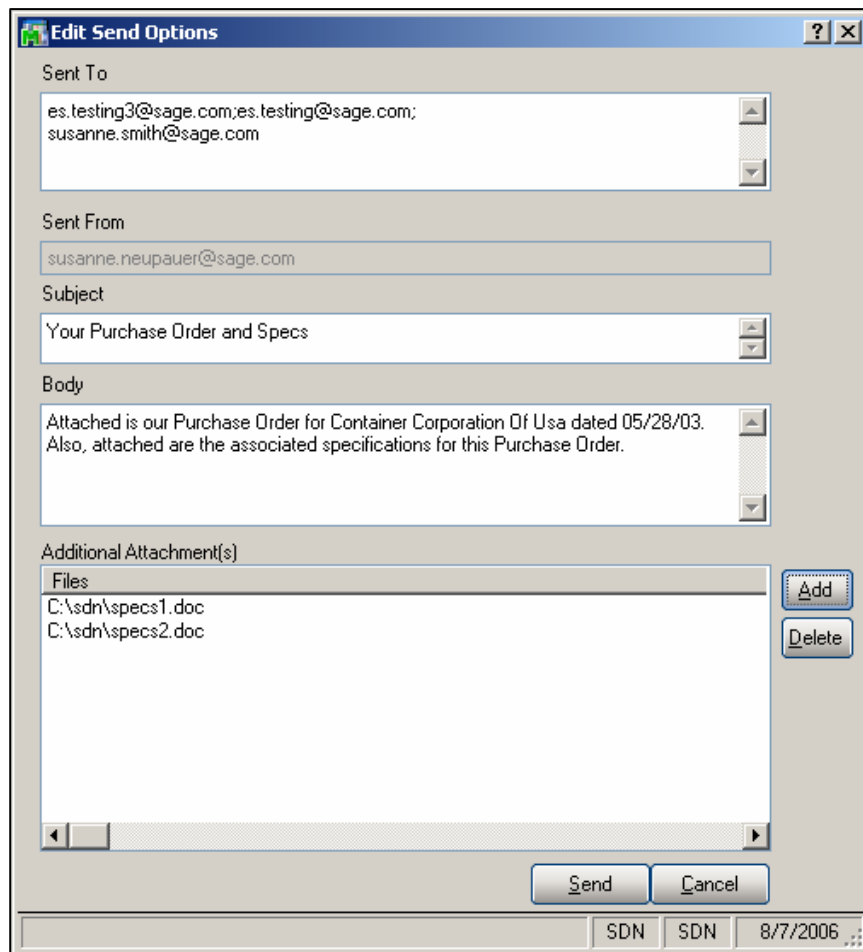


Figure 6

If the token <<DOC_#>> was added to the Subject Line Text during Setup the resulting Subject Line of the e-mail, after it has been printed to PDF and an e-mail generated, will have the Purchase Order Number of the attached PDF substituted where <<DOC_#>> exists.

You can Shift/click or Ctrl/click to highlight multiple entries. When the 'Electronic Delivery' button is clicked, you will receive the following message telling you that multiple documents have been selected and you will not be able to edit the Send Email options (Figure 7). After you click 'Yes' to continue, you will be prompted to send the highlighted Purchase Orders. When the 'Delete' button is clicked, you will be prompted to delete the highlighted Purchase Orders.

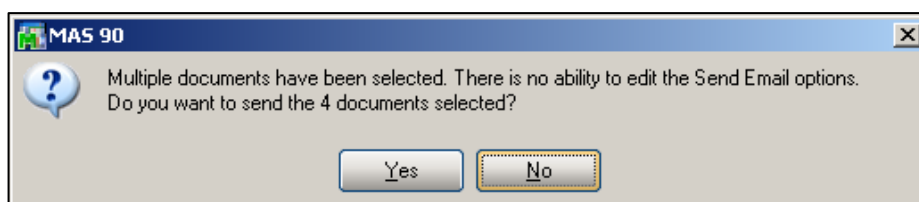


Figure 7

Moving Documents

When the 'Move' button (Figure 5) is clicked with documents highlighted, you will be prompted for the new path for the documents (Figure 8).

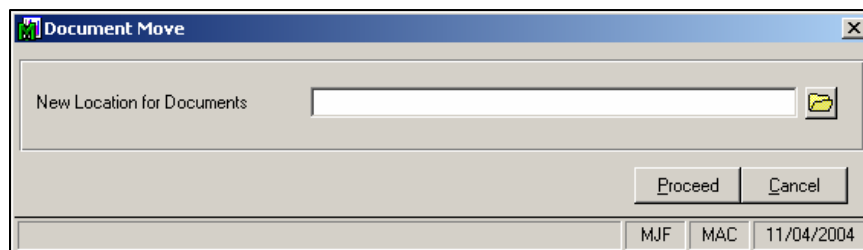


Figure 8

After you have selected the directory location for the documents, press Proceed to begin the Move process. If you have not selected any documents in the viewer then it is assumed that you want to move all of the documents currently listed in the Viewer. You will be warned and asked if you want to continue (Figure 9). To move all the documents currently displayed in the viewer, press 'Yes'.



Due to interpreter limitations, you should select no more than 100 documents at a time for moving.

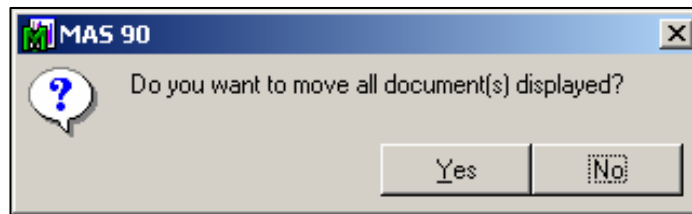


Figure 9

The program will attempt to move all of the selected documents that it can, and will reset the path for those documents.



If 'Exist' = No then no document will be copied, but the path will be changed (this assumes it has already been moved).

Period End

Period End is modified with a new option to purge all purchase order PDFs by a single date (Figures 10 and 11) Only PDF files with no matching Order Numbers in the Purchase Order Header File (PO1) and were created on or before the specified date will be deleted.

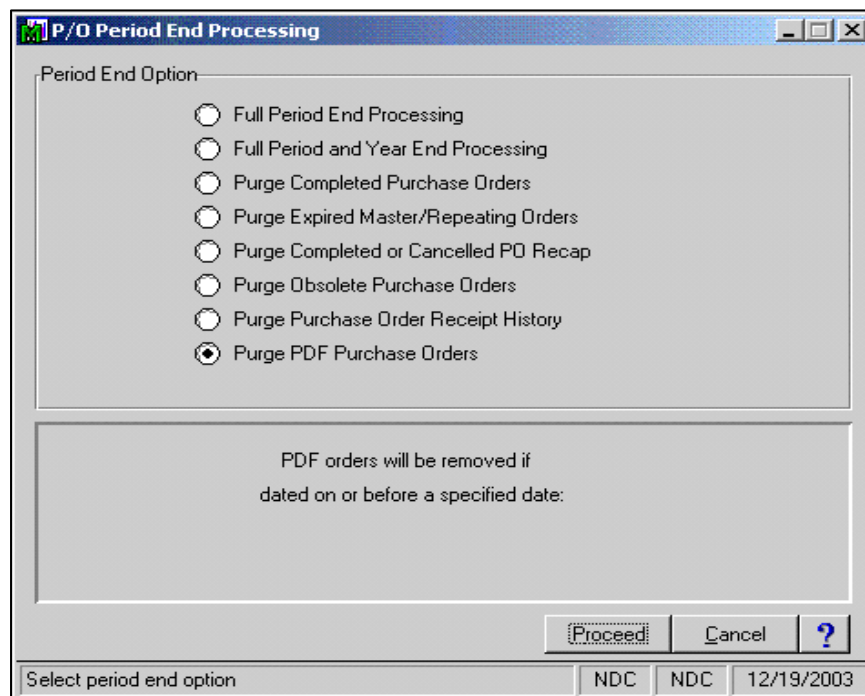


Figure 10

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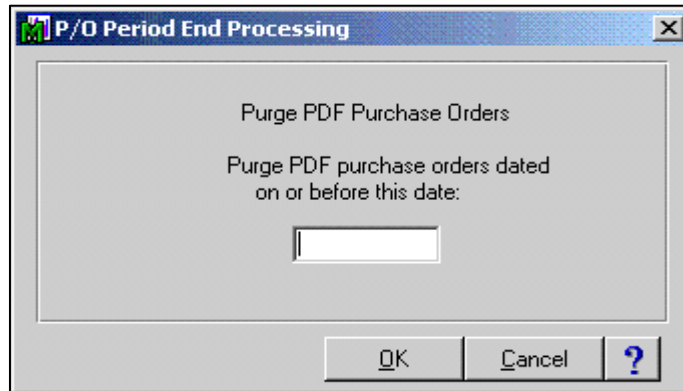


Figure 11

Vendor Renumber/Merge/Delete Utility

The Vendor Renumber/Merge/Delete Utility, as well as the 'Renumber' and 'Delete' options in Vendor Maintenance, have been modified as follows:

When you renumber a vendor, all records in the log file will have the Vendor Number changed to be the new Vendor Number. The PDF filenames, which contain the original Vendor Number, will be unchanged.

When you merge vendors, all records in the log file referencing the 'From Vendor Number' will be changed to the 'To' Vendor Number. The PDF filenames, which contain the original Vendor Number, will be unchanged.

When you delete a vendor, all log records and PDF documents for that vendor will be deleted.

ODBC Dictionary

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

<i>File:</i>	<i>Description</i>	<i>Field:</i>
AP_VendorPDFLog_001	Paperless Office Vendor	All Fields

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

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What's New

With the 07-12-07 release:

- Added a <<DOC_#>> token for purchase order number to the e-mail subject line.

With the 04-13-07 release:

- Replaced AP_EE with AP_VendorPDFLog_001

With the 08-08-06 release:

- Added ability to edit the send options as well as add other attachments from the viewer for a single document.

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 by Sage Software, Inc. to the standard operation of Sage Software, Inc. 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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