Enhanced Customer Purchase Order Number Validation
SO-1096

Overview

This Extended Solution modifies the Standard Sales Order Option 'Check for Duplicate Customer PO Numbers' by

- Allowing the user to prevent re-use of a Customer P/O Number
- Telling the user on what document the duplication was detected
- Always searching A/R Invoice History
- Optionally searching S/O Invoice Entry

The Standard Sales Order Option 'Check for Duplicate Customer PO Numbers' must be checked in order to enable this Extended Solution.

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

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
Upon completion of software installation, you will need to access Extended Solutions Setup from the Sales Order Setup menu. Select this part number, and the Setup screen for this Extended Solution will appear (Figure 1). Check the 'Enable Extended Solution' box to activate this Extended Solution. The manual for this Extended Solution 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).
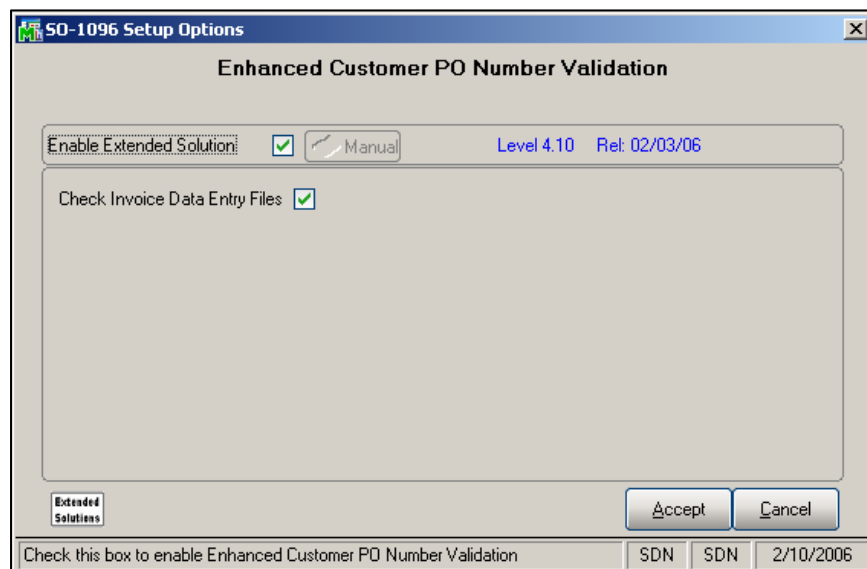

SO-1096 Setup Options

Enhanced Customer PO Number Validation

| Enable Extended Solution | ☑ | Manual | Level 4.10   Rel: 02/03/06 |

Check Invoice Data Entry Files ☑

Extended Solutions

Accept   Cancel

Check this box to enable Enhanced Customer PO Number Validation | SDN | SDN | 2/10/2006

Figure 1

Answer the following prompt:

CHECK INVOICE DATA ENTRY FILES: Check this box to cause the Invoice Data Entry files to also be searched for a duplicate Customer P/O number.

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

Roles/Tasks
The following security event has been added:
- 'Allow Duplicate Customer POs' can be found under the Sales Order module.

Users who are authorized to run any of the above should be granted permissions for the prospective tasks and security events. Please review your security setup in Role Maintenance and make appropriate changes.

Operation
During Sales Order and Sales Order Invoice data entry, if an existing Customer P/O Number is found in the Open Sales Order file, the A/R Invoice History file or (if specified) in the Open S/O Invoice file, then a pop-up window will be displayed showing the Sales Order or Invoice number that references the duplicate Customer P/O Number (Figure 2).
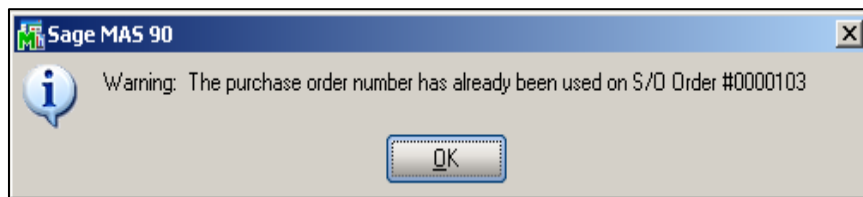

Figure 2

If a user is assigned the security event: 'Allow Duplicate Customer POs' then they will be warned, but allowed to accept entry of the duplicate Customer PO.
If a user is not assigned that security event then they must change the Customer PO Number in order to proceed.

What's New
With the 2-8-06 release:
- Title changed.
- Converted to Business Framework
- The following options were removed from Setup:
  - Require Unique Customer P.O. Number
  - Password
  - Activate Extended Solution In (Order Entry/Invoice Entry/Both)
- Added a security event to 'Allow Duplicate Customer POs'

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 channel partner 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 their 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