
Authorized Purchase Control by Customer or State

SO-1271

Overview

This Extended Solution to the Sales Order module

- prevents specified customers or orders that reference specified Ship To state codes from purchasing individual items or from specific product lines. **OR**
- allows only the specified customers or Ship To state codes to purchase certain items or from specific product lines.

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

Extended Solutions

- Merge Installation Files
- Extended Solutions Setup options

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).

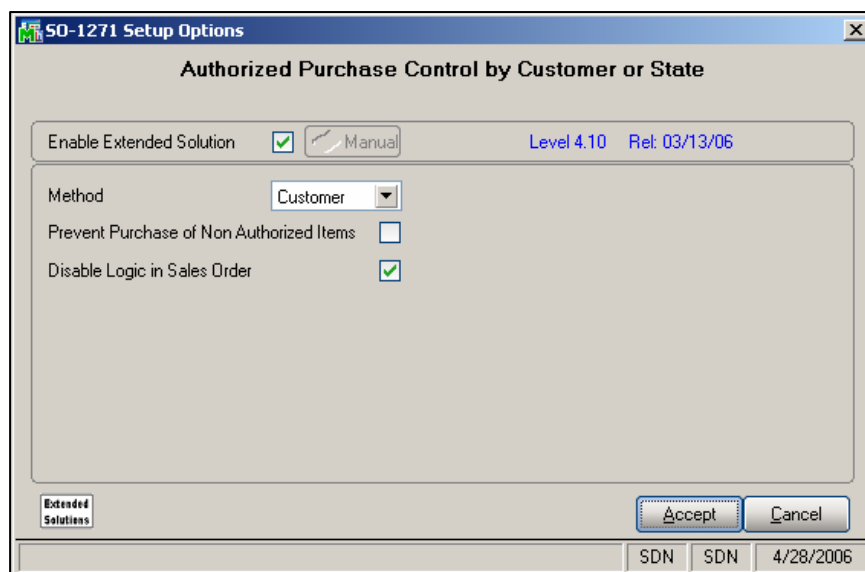


Figure 1

Answer the following prompts:

METHOD: Select 'Customer' to restrict based on the Customer Number. Select 'State' to restrict based on the order or invoice's Ship To State.

PREVENT PURCHASE OF NON AUTHORIZED ITEMS: If you check this box, the restriction will be that the customer or state can purchase *only* the items specified. If unchecked then the customer or state *cannot* purchase the items specified.

DISABLE LOGIC IN SALES ORDER: This option is only available if IT-1024: *SO-1271 Integration with e-Business Manager* is enabled. If checked, then SO-1271's logic in sales order entry and sales order invoice entry will be disabled.

Roles/Tasks

The following Security Event has been added to Sales Order:

- Allow Unauthorized Items/Product Lines

The following Task has been added to Sales Order, Maintenance/Data Entry:

- Purchase Control Maintenance

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.


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

Operation*Purchase Control Maintenance*

Purchase Control Maintenance has been added to the Sales Order Setup menu. If you selected 'Customer' for the Method, you will define a Customer Number along with an unlimited number of Items and Product Lines (Figure 2). If you checked 'Prevent Purchase of Non Authorized Items' during setup then the items on this list are the only items which the Customer can purchase.

Item Number	Description	Product Line	Description
1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK		
124			
2480-8-50	DESK FILE 8" CAP 50		
8953	UNIVERSAL 3 1/2" SDD FLEX DSK		
		DC	DATA COMMUNICATIONS
		FD&A	FLEXIBLE DISKS & ACCESS.
		PS&A	PRINTER SUPPLIES & ACCESS

Figure 2

Click on the  button to view a listing of the existing records in the file (Figure 3).

Extended Solutions

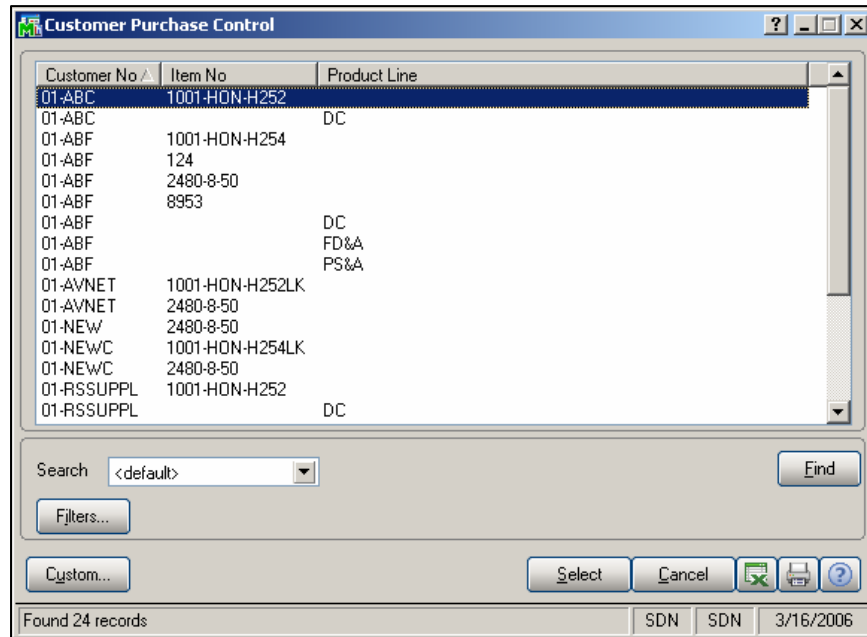


Figure 3

Click the Print button on the Purchase Control Maintenance screen (Figure 2) for a listing of all the authorized/unauthorized items and product lines set up for the current customer (Figure 4).

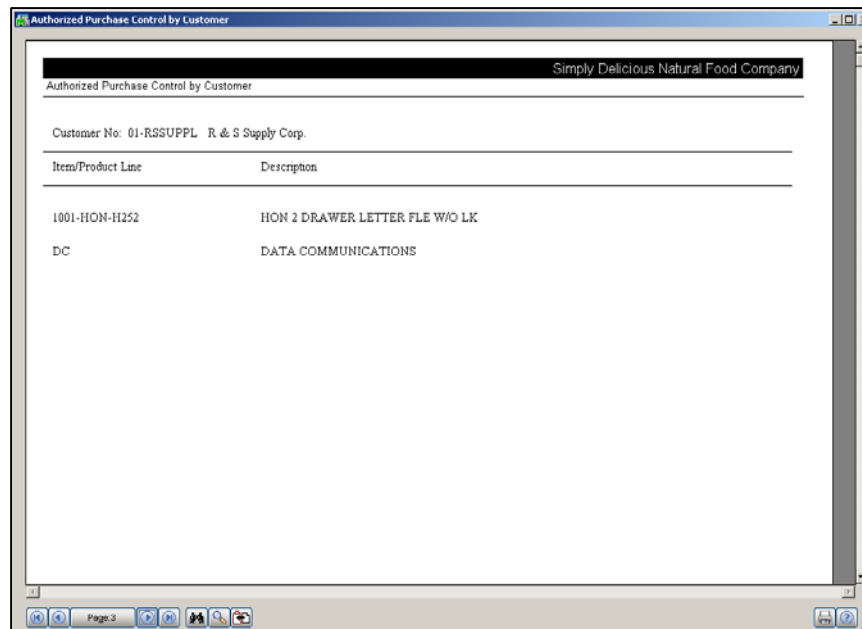


Figure 4

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If you selected 'State' for the Method, you will define a State Code along with an unlimited number of Items and Product Lines (Figure 5). If you checked 'Prevent Purchase of Non Authorized Items' during setup then the items on this list are the only items which the Customer can purchase.

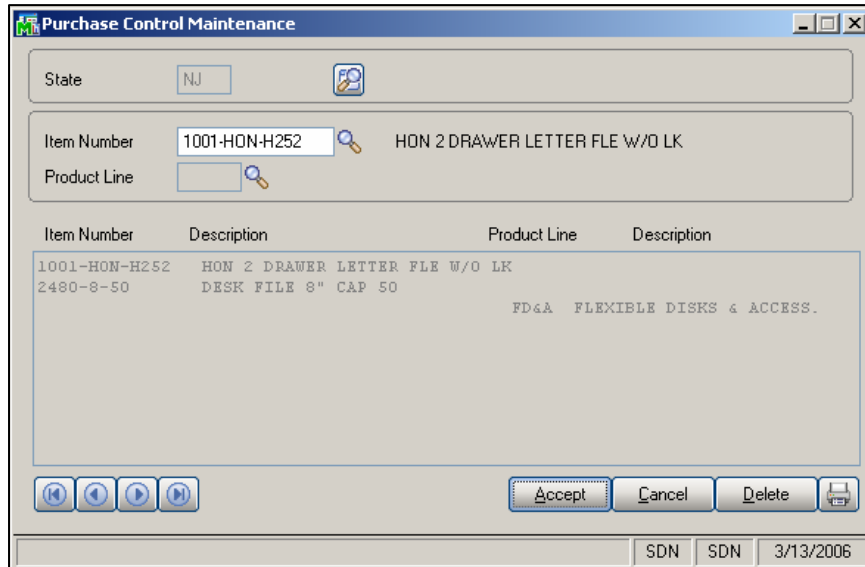



Figure 5

Click on the  button to view a listing of the existing records in the file (Figure 6).

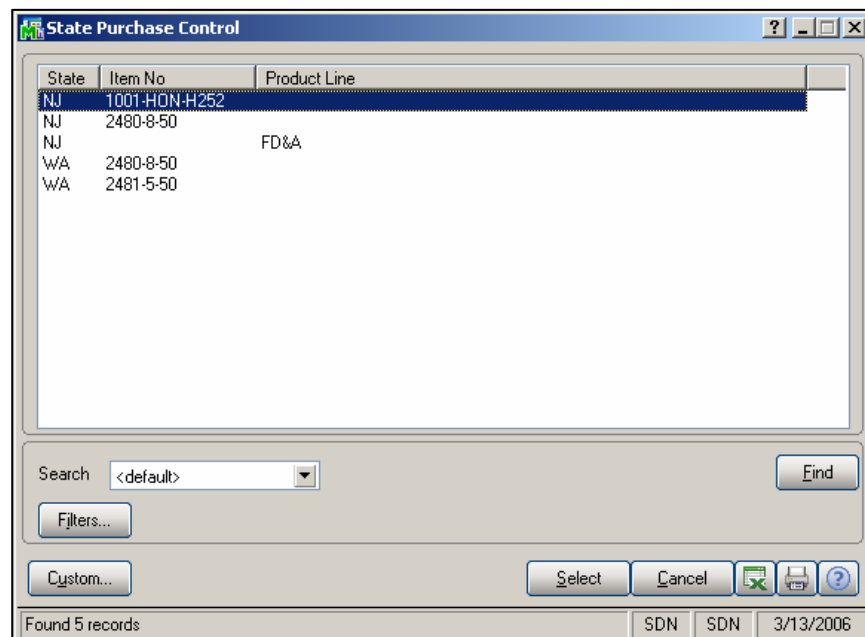


Figure 6

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Click the Print button on the Purchase Control Maintenance screen for a listing of all the authorized/unauthorized items and product lines set up for the current state (Figure 7).

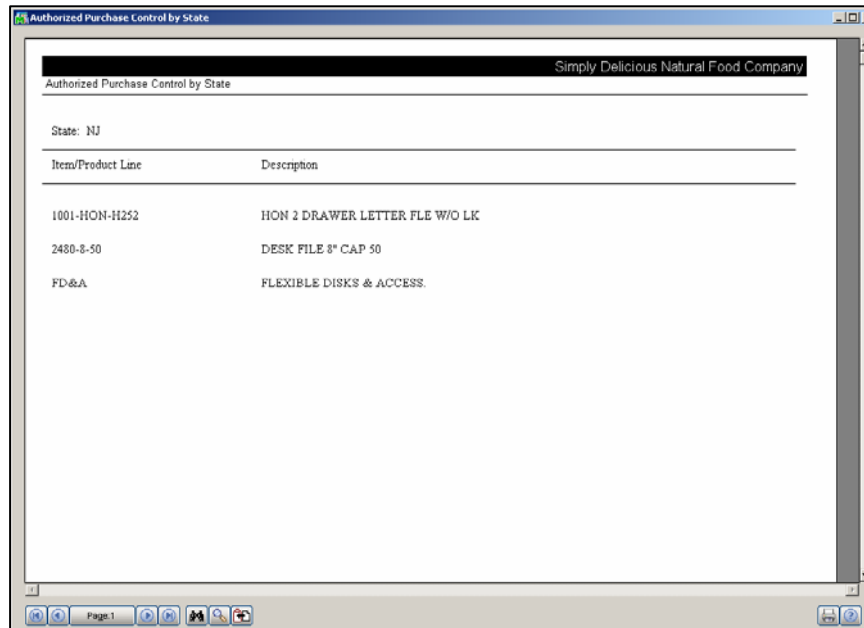


Figure 7

Sales Order Processing

During Sales Order Entry and Sales Order Invoice Entry, if you enter an unauthorized Item Number or an Item Number from an unauthorized Product Line, a warning message will appear (Figure 8).

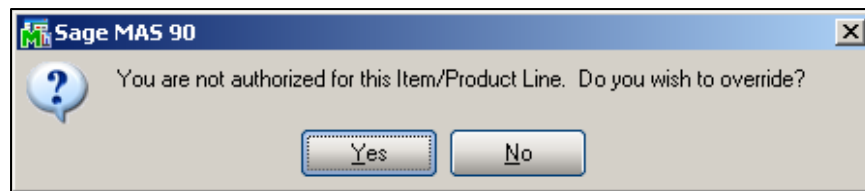


Figure 8

If you say No, the cursor will return to the Item Number field. If you answer 'Yes' you will be prompted to enter a User logon and password (Figure 9). This must be a user who has access to the security event to 'Allow Unauthorized Items/Product Lines'. Without entry of a valid override logon, the program will not accept entry of an unauthorized item.

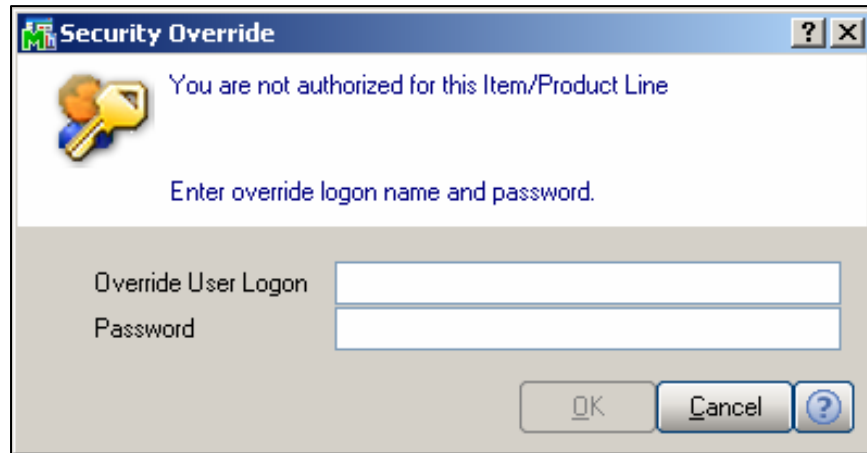


Figure 9

With IT-1024

If you have IT-1024, *SO-1271 Integration with e-Business Manager* enabled and have checked the 'Disable Logic in Sales Order' then all of the processing noted above will be disabled in the Sales Order module. The restrictions will apply only to purchases made from e-Business Manager.

ODBC Dictionary

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

File:

SO_CustomerPurchaseControl_001
SO_StatePurchaseControl_001

Fields:

All fields
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.

What's New*With the 04-28-06 release:*

- Added 'Disable Logic in Sales Order' when IT-1024 is installed.

With the 03-14-06 release:

- Converted to Business Framework
- Now allows for selection of restriction by Customer or by State
- Changed 'Allow by Customer' option to 'Prevent Purchase of Non Authorized Items'
- Changed password override to a Security Event

SAGE MAS 90

SAGE MAS 200

Extended Solutions

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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