Overview
This Extended Solution to the Sales Order module allows for a Miscellaneous Item Code to be automatically added to Orders and/or Invoices when you exit the Lines Tab. This additional fee could be:
- A flat fee
- With IM-1077: *User Defined Fields for Inventory Masterfile* installed and enabled, the result of a calculation of I/M item Quantities multiplied by a value in an IM-1077 UDF, then summed for the Order or Invoice.
- The result of a calculation of IM1 'Retail Price' multiplied by a percentage specified in Setup, and then multiplied by the Qty Ordered/Shipped and summed for the Order or Invoice.
- Based on the presence of a specified Customer UDF it is then calculated as either a percentage of the Order's Total amount or the result of the Order's Total Quantity multiplied by a rate.

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](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

**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](image)

Answer the following prompts:

**CREATE DURING:** Select ‘Orders’ to add the charge line to Sales Orders. Select ‘Invoice’ to add the charge line to Invoices. Select ‘Both’ to allow addition of the charge line in Sales Orders and Invoice entry.
**Charge Code Creation Method:** Select ‘Standard,’ ‘A/R Customer UDF,’ or ‘Percentage of Retail Price’ method (see each section below for descriptions of each method).

If you have selected ‘Standard’ (Figure 1) the following prompts will be available:

**Auto Addition Charge Code:** Specify the Sales Order enabled Miscellaneous Item Code which will be added.

If you have IM-1077 installed and enabled, then the following prompt will be available:

**Cash Redemption Value UDF:** Enter the IM-1077 Numeric type UDF to be used to calculate the Misc. Charge Amount.

If you selected ‘A/R Customer UDF’ Creation Method, the following three sets of prompts will be available (Figure 1b)

**A/R Customer UDF:** Enter a Numeric Type UDF.

**Calc Type:** This option defines how the value of the A/R Customer UDF will be used to calculate the Misc Charge Amount:

- Select ‘Percentage of Total Amount’ to calculate the amount of the charge based upon a percentage of the Order’s Total amount.
- Select ‘Rate* Total Quantity’ to calculate the amount of the charge based upon Order’s Total Quantity multiplied by a rate.
**CHARGE CODE:** Specify the Sales Order enabled Miscellaneous Item Code which will be added.

If you have selected ‘Percentage of Retail Price’ (Figure 1c) the following prompts will be available:

**AUTO ADDITION CHARGE CODE:** Specify the Sales Order enabled Miscellaneous Item Code which will be added.

**PERCENTAGE:** Enter the percentage you wish to use with the ‘Percentage of Retail Price’ calculation method.

**MINIMUM CHARGE:** Enter a minimum charge here. If the value in the Minimum Charge is greater than zero, then during Charge Code calculation, the program will compare the result to this minimum and use which ever is greater.

![Automatic Addition of Charge Code](image)

**Figure 1c**

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

**Operation**

**Standard Charge Code Creation Method**

**Sales Order Entry**

If you selected ‘Order’ or ‘Both’ for the ‘Create During’ Setup option, the first time you exit the Lines tab of a newly-created Sales Order, the specified Miscellaneous Item Code is
added. This functionality will not take place on Master or Repeating type Orders. The default Unit Price value from Miscellaneous Item Maintenance will be used. If it is an Item type code the Qty Ordered will be set to ‘1’.

If you entered an IM-1077 UDF for the Cash Redemption Value, an option will appear as you exit Sales Order lines allowing you to ‘Recalculate CRV Value?’ (Figure 2). If you select Yes, the specified Miscellaneous Item Code will be calculated by multiplying the value of the Item UDF by the Quantity Ordered per line then summing them for all lines.

Figure 2

Invoice Data Entry/Auto Creation
If you selected ‘Invoice’ or ‘Both’ for the ‘Create During’ Setup option, the first time you exit the lines tab of an Invoice that does not reference a Sales Order number, the specified Miscellaneous Item Code is added. The default Unit Price from Miscellaneous Item Maintenance will be used. If it is an Item type code the Qty Ordered will be set to ‘1’.

If you are using the ‘Both’ option, no Item Code will be added when you create an Invoice from a Sales Order.

If you entered an IM-1077 UDF for the Cash Redemption Value, an option will appear as you exit Sales Order Invoice lines allowing you to ‘Recalculate CRV Value?’ (Figure 2). If you select Yes, the specified Miscellaneous Item Code will be calculated by multiplying the value of the Item UDF by the Quantity Shipped per line then summing them for all lines.

A/R Customer UDF Charge Code Creation Method
Sales Order Entry
If you selected ‘Order’ or ‘Both’ for the ‘Create During’ Setup option, the first time you exit the Lines tab of a newly-created Sales Order, the specified Miscellaneous Item Code(s) will be added if the specified Customer UDF has a value greater than zero and the result of the calculation is greater then zero. This functionality will not take place on Master or Repeating type Orders. If the Miscellaneous Item Code is an Item type, the Unit Price will be set to the result of the calculation specified for the UDF in Setup and the Qty Ordered will be set to ‘1’. If it is a Charge type code then the extension will be set to the calculation result.
When modifying an existing order, an option will appear as you exit Sales Order lines allowing you to ‘Recalculate A/R Customer UDF Charge Value?’ (Figure 3). Select Yes, the Miscellaneous Item Codes will be recalculated based upon the Order’s current Total Quantity and Amount.

![Figure 3](image)

**Invoice Data Entry/Auto Creation**

If you selected ‘Invoice’ or ‘Both’ for the Setup option ‘Create During’ Setup option, the first time you exit the lines section of an Invoice that does not reference a Sales Order Number, the Miscellaneous Item Code(s) from Setup will be added in the same manner noted in Order Entry, only the Qty Shipped will also be set to ‘1’ if it is an Item type Code.

When modifying an existing Invoice, an option will appear as you exit Invoice lines allowing you to ‘Recalculate A/R Customer UDF Charge Values?’ (Figure 3). If you enter Yes, the Miscellaneous Item Code(s) will be recalculated based upon the Invoice’s current Total Quantity and Amount.

**Percentage of Retail Price Creation Method**

If you selected ‘Order’ or ‘Both’ for the ‘Create During’ Setup option, the first time you exit the Lines tab of a newly-created Sales Order, the specified Miscellaneous Item Code is added. This functionality will not take place on Master or Repeating type Orders.

If you elected to calculate in Order Entry, the Miscellaneous Item Code that is added upon exit of the Lines Tab will be the result of:

\[(IM1 \text{ Retail Price} \times \text{Qty Ordered}) \times \text{Percentage from Setup}\]

for each line, then sum all of the results from each line.

If you elected to calculate in Invoice Entry, the Miscellaneous Item Code that is added upon exit of the Lines Tab will be the result of:

\[(IM1 \text{ Retail Price} \times \text{Qty Shipped}) \times \text{Percentage from Setup}\]

for each line, then sum all of the results from each line.

If you elected to calculate in Both, orders being invoiced will have their Miscellaneous Item Code recalculated based on Qty Shipped. This will occur upon exit of the Lines Tab in Invoice Entry.

If the value in the ‘Minimum Charge’ field on the Setup screen is greater than zero, the program will compare the calculated result to this minimum and use which ever is greater.

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If changes are made to an Order or Invoice, you will be asked if you want to recalculate the percentage value (Figure 4) as you exit the Lines Tab.

All Creation Methods
Shipping Date Entry
If you selected ‘Both’ for the Created During option, and you use Shipping Data Entry, the Miscellaneous Item Code will be recalculated in the same manner as described for Invoice Entry.

Sales Order Journal Update
If a Back Order is created during Sales Journal update, Miscellaneous Item Code processing will occur as if the order was entered manually per its creation method's specifications.

Helpful Hint
• In all instances, the auto added Item Codes may be deleted or overridden by the user.

What’s New
With the 06-14-07 release:
• Converted to Business Framework
• The AR-1080 UDFs are now Custom Office Customer UDFs

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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