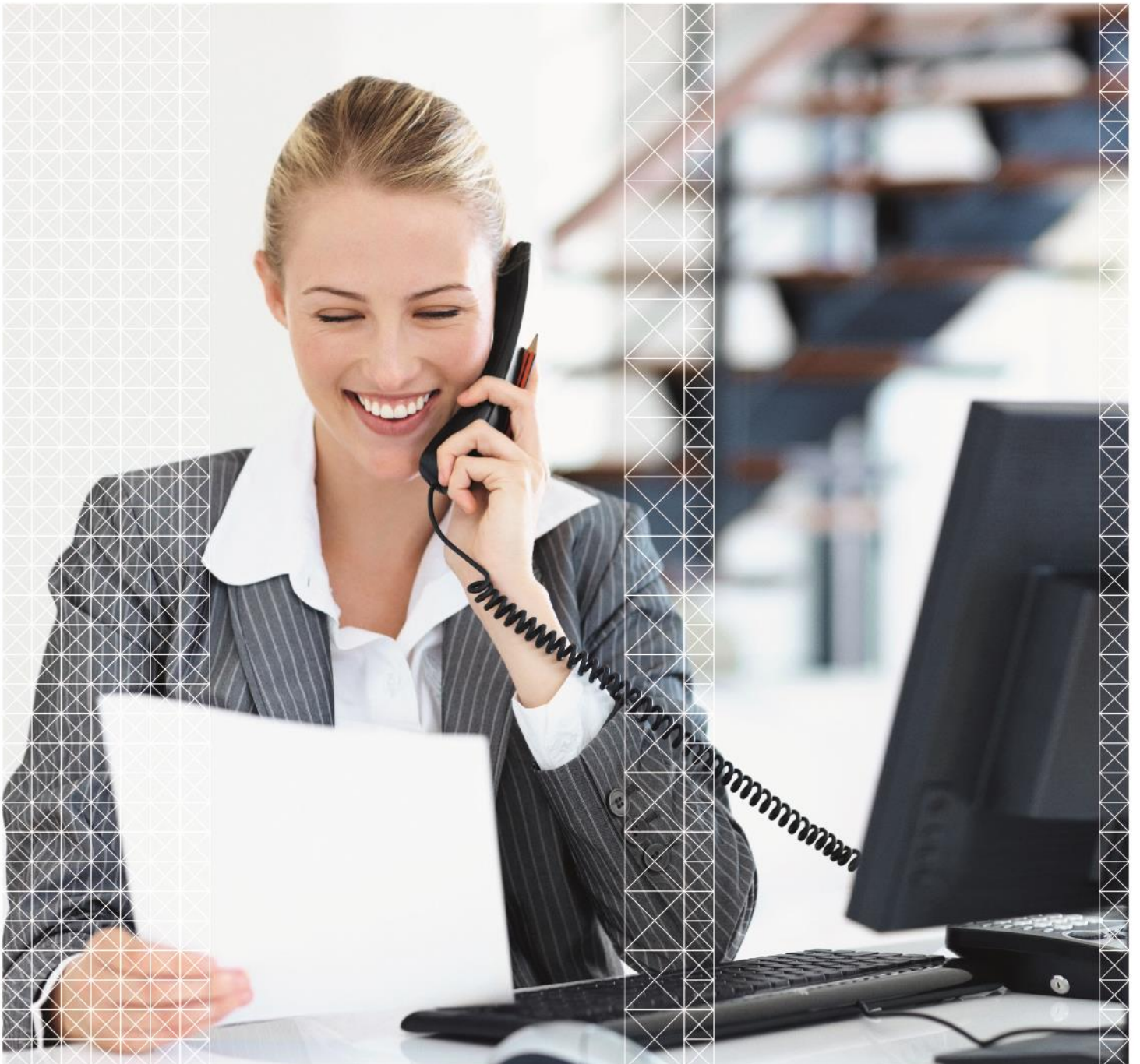


▶ **Invoice/Credit Note**

Locking

Sage 1000 Help Sheet



Sage ERP 1000 v3 Service Pack 2 introduced a different way of managing users entering invoices and credits at the same time as Invoice & Credit Print is being run. The old (OPINVLOCK) method can still be used.

1. Existing Implementation

The existing method is to use the OPINVLOCK system key to record how many users are in the Sales Invoices and Sales Credits options, or if the Invoice & Credit Print is being run.

Users in Invoices and Credits

- ▶ Every time a user goes into the Sales Invoices or Sales Credits option (they don't even need to be in an invoice or credit note, just in the option itself) the system key OPINVLOCK gets updated. If it is blank, it gets set to a value of LOCK. If it already says LOCK and then a number, the number is incremented. In this way it effectively keeps a count of the number of users in the relevant option.

Exit Copy Delete
Confirm Extended help Print

System key maintenance header

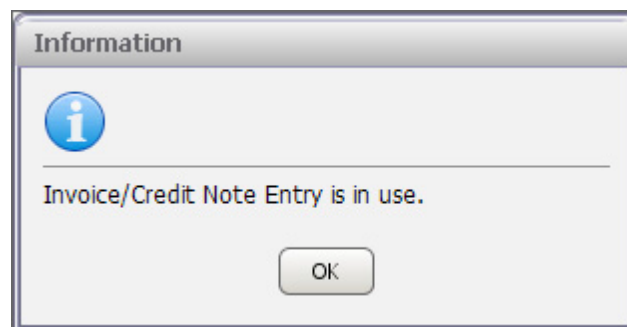
System key: OPINVLOCK

System key maintenance details

Description: Invoice run lock - user name and tty

Value: LOCK 1

- ▶ If Invoice & Credit Print is run at this point, there is an error informing the user that other people are entering invoices or credit notes.



- ▶ When a user exits the Sales Invoices or Sales Credits option then number in the system key gets decremented. When it reaches zero the system key is cleared. At this point Invoice & Credit Print can run.
- ▶ When a user goes into Invoice & Credit Print, again the system key OPINVLOCK gets set, this time to EXCLUSIVE followed by the username and process id of the user running the option.

System key maintenance header

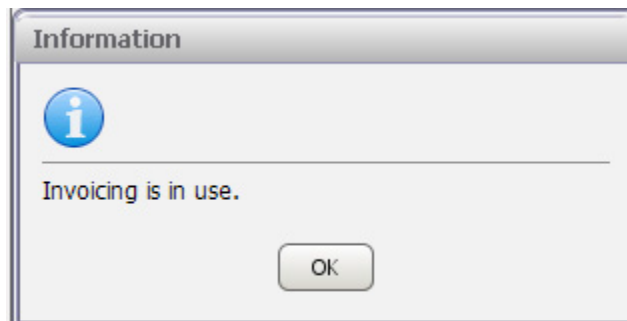
System key:

System key maintenance details

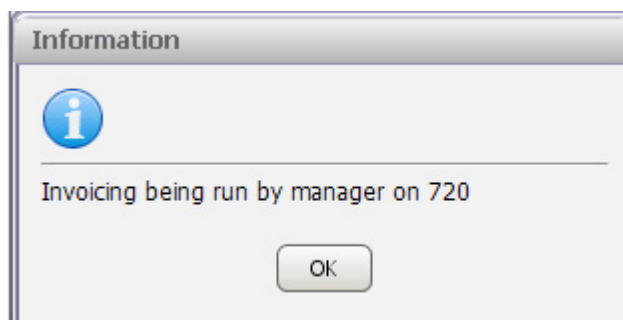
Description:

Value:

- ▶ Now when users attempt to go into Sales Invoices or Sales Credits they get a message that the Invoice & Credit Print is being run.



- ▶ Users are also prevented from going into Invoice & Credit Print.



- ▶ When the user exits Invoice & Credit Print the OPINVLOCK key is cleared once again.

This method of using a system key as a 'semaphore' to indicate that programs are in use has a drawback which is highlighted by the way Sage ERP 1000 v3 works.

If the user fails to exit the option fully then the key remains locked and the only way to clear it is to manually edit the key via the System Manager menu option. The most common reason for this happening is if the user closes their browser window whilst in the option. Although the option itself can be cleared up, there is no way to perform the additional required action of updating the system key.

2. Alternate Implementation

In Sage ERP 1000v3 with Service Pack 2 there is an alternative to this locking.

Instead of preventing users from going into options, this prevents the Invoice & Credit Print from processing invoices or credits notes that are actively being edited.

- ▶ To enable this there is a new system key, OPINVLOCKX. This is set to YES to use the existing (OPINVLOCK) functionality or NO to use the alternate functionality. It defaults to YES on install of Service Pack 2.

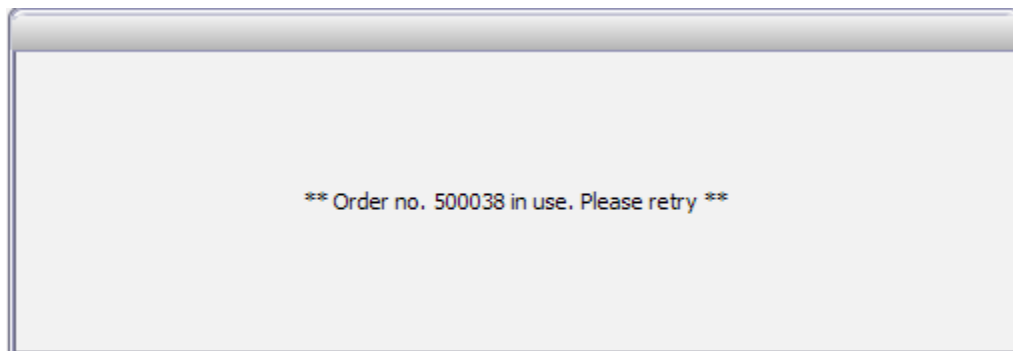
The screenshot shows a web-based interface for system key maintenance. At the top, there is a toolbar with buttons for Exit, Copy, Delete, Confirm, Extended help, and Print. Below the toolbar, the interface is divided into three sections:

- System key maintenance header:** A text field labeled "System key:" containing the value "OPINVLOCKX".
- System key maintenance details:** A "Description:" field containing "Use OPINVLOCK functionality" and a "Value:" field containing "YES".
- Help:** A text area containing the following text:
This system key is used in SOP options and Telesales options that print invoices, credit notes and credit reclaims.
If it is set to YES, OPINVLOCK will be set and released as described by the help for OPINVLOCK.
If it is set to NO, OPINVLOCK will not be used.
Please see extended help for further details.

The extended help reads:

- ▶ This system key is used in SOP options Sales Invoices, Sales Credits, Credit Reclaims, Invoice and Credit Print, Invoice and Credit Consolidation and Credit Reclaim Print. It is also used in the relevant Telesales options.
- ▶ If set to YES, OPINVLOCK will be set as per the extended help for OPINVLOCK. This is standard functionality as in Line 500.
- ▶ If set to NO, OPINVLOCK will not be used, unless user defined invoice numbering (project DA0687) has been set up for SOP.
- ▶ If OPINVLOCK is not used, the environment variable OPORDHOLD will be ignored for the OP Sales Invoice and Credit Entry options. This means that SOP invoices and credits will always be marked as held whilst being entered so that they cannot be picked up by the batch runs. This also means that more than one Invoice and Credit Print, Invoice and Credit Consolidation and Credit Reclaim Print may be run concurrently.

With the system key set to NO, the held indicator in the opheadm table is set to H. When the Invoice & Credit Print option is run, if one of these held records is encountered then a message indicating that an order is in use is displayed.



The run will continue when the user exits the invoice or credit note. There is no other way to proceed (i.e. no skip option) and so if the invoice or credit note is locked following a client failure the process will need to be killed manually on the server (which may be a call to support).

There is nothing to stop users going into Sales Invoices or Sales Credits while the Invoice & Credit Print option is being run. However this should not cause any issues in practice.

Neither is there anything to stop two Invoice & Credit Print options being run simultaneously. This is probably best avoided by internal procedures as there is the potential to produce two spool prints with the invoices and credit notes split between them.

3. Summary

There are now two methods of managing invoices and credit notes being entered while the invoice and credit notes are being spooled. They work in a different way to each other and which is used by a particular site is entirely down to which fits in better with their existing processes.