DSD Business Systems

Sage 100 Enhancements

IM69

Contract Pricing by Valid Date by Ship To

IM69

Version 6.20

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Contract Pricing by Valid Date by Ship To User's Manual
Version 6.20

31 October, 2022

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to Sage 100. For instructions on using Sage 100, refer to the appropriate Sage 100 manual, or call your Sage 100 reseller. DSD Business Systems offers excellent Sage 100 support, at an hourly rate.

Web Resources

DSD web site: **http://www.dsdinc.com**

The Enhancement page contains:

Current Release Schedule
Purchasing Information
Installation Instructions
Product Support
Enhancement Links

I069 Contract Pricing by Valid Date:

http://www.dsdinc.com/enhancement/contract-pricing-by-valid-date-2/

The product web page contains:

Product Description
Web Links
Current Product Version Table
Product Installation File Download
Product Manual in .pdf Format
Revision History
FAQ

Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate. DSD's telephone number is **858-550-5900**. Fax: **858-550-4900**.

For a hard error, where the program displays an error dialog, report:

Error number.
Program name.
Line number.
Program version.
Exact sequence that caused the error, including menus and menu selections.

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Other pertinent information.

If leaving a message or faxing, please include:

Your name.
Your phone number (and fax if applicable) and extension.

It is possible to be unable to duplicate a problem, because of data corruption or because we have not exactly duplicated a particular operating environment. In such circumstances, we can only continue to try to fix the problem if we can either access the system with Symantec PCAnywhere or by some other means access or duplicate the system.

Contract Pricing by Valid Date by Ship To Features

This DSD Enhancement adds five options to Inventory Item Pricing: Customer/Valid Date, Price Level/Valid Date, Customer/Price Level/Valid Date, Customer/Ship To and Customer/Valid Date/Ship To. (This enhancement is a combination of SOIP and IM-1069)

This Extended Solution does not function with IM-1097, *Additional Pricing Tiers for Item Pricing*.

Additional functionality is available if you have CM-1002, *User Defined Fields for IM-1069,* IM-1049, *Vendor Rebates,* and/or SO-1381, *Inventory Unit Cost by Line in Order Entry* installed and enabled. The Custom Office Module must be activated.

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Section B: Getting Started

- **If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.**
- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.
- **Check with DSD before installing more than one Enhancement.**

Required Levels

Sage 100 Module	Module Required	Required Level
I/M	**Y**	7.10
S/O	**Y**	7.10
A/R	**Y**	7.10

Installation

1. **Back-up:** Exit all Sage 100 sessions. Back-up existing Sage 100 data.
2. **Check Levels:** Sage 100 module levels **must match** those listed above.
3. **Run Enhancement Setup Program:** Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.
4. **Send your Sage Serial Number to your DSD Representative:** Send your Sage Serial Number to your DSD representative in order for us to send you back the encrypted keys to unlock your system. This serial number can be found in Library Master\Setup\System Configuration, Tab 3. Registration as Serial Number.
5. **Re-Start Sage 100:** Sage 100 will be updated.
6. **Unlock the Enhancement:** DSD Enhancements must be unlocked to run. When any part of the Enhancement is run for the first time, the **DSD Enhancement License Agreement and Activation** window will appear. Follow the steps shown on that window. *You can click the Help button for more detailed instructions.*

   Note: *On the next page is a screenshot of the DSD Enhancement License Agreement and Activation window.*

   After accepting the License Agreement, you can then select the type of unlocking that you'd prefer. The choices are File, Web, Demo and Manual Entry.

   File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

   Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web

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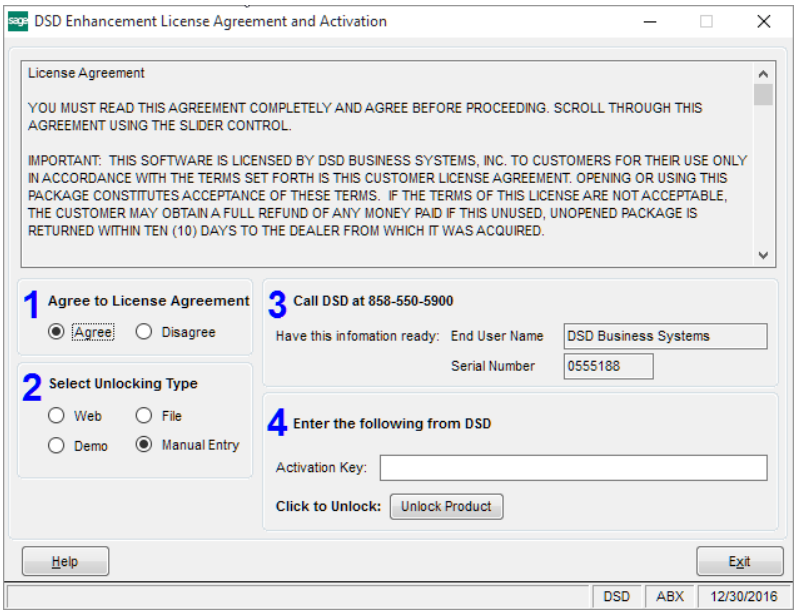
Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from DSD *and then proceed to unlock all enhancements contained in the file.*

- *The Sage 100 system that is being used must have web access for this option to be effective.*
- *You can send your Sage Serial Number to your DSD Enhancements sales representative.*

Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

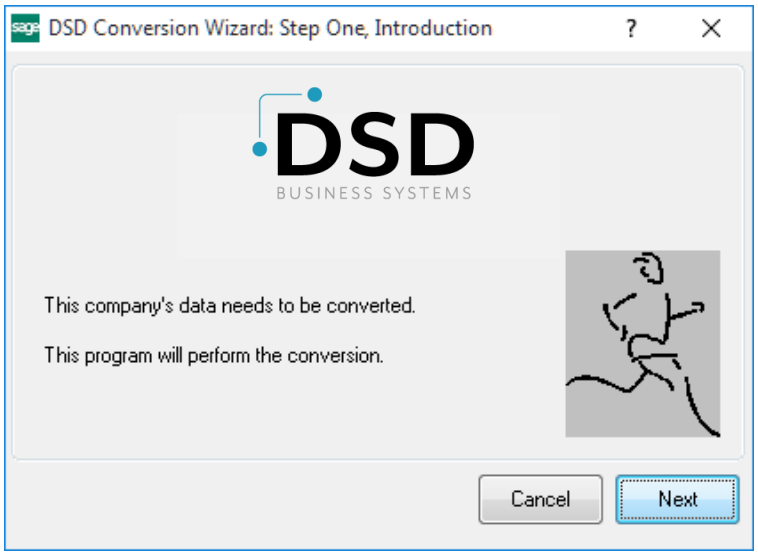
- *Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.*



Manual Entry Unlock: If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

Note: *You can also unlock a DSD Enhancement through the* ***DSD Enhancement Control Panel*** *found on the Library Master Utilities Menu. Then, select the Enhancement with your mouse from the list of Enhancements and click the* ***Unlock Product*** *button on the right side of the window.*

7. **Convert Data:** After unlocking, the DSD Conversion Wizard will appear. Follow on-screen instructions to complete data conversion. *You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.*



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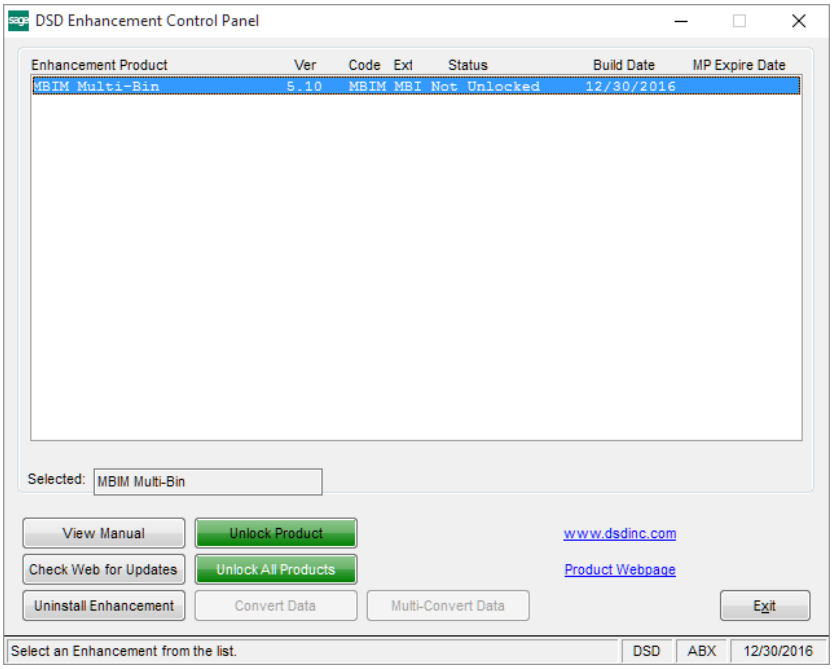
DSD Enhancement Control Panel

Starting with version 3.61, all DSD Enhancement products include DSD's Enhancement Control Panel. The **DSD Enhancement Control Panel is accessed from the Library Master Utilities menu**.



The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired task.

View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

Unlock All Products: This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*

Convert Data: After verification, the selected Enhancement's data conversion program will run. Data conversion is non-destructive, and may be triggered any number of times. Sometimes this is required to fix data records imported or updated from a non-enhancement installation.

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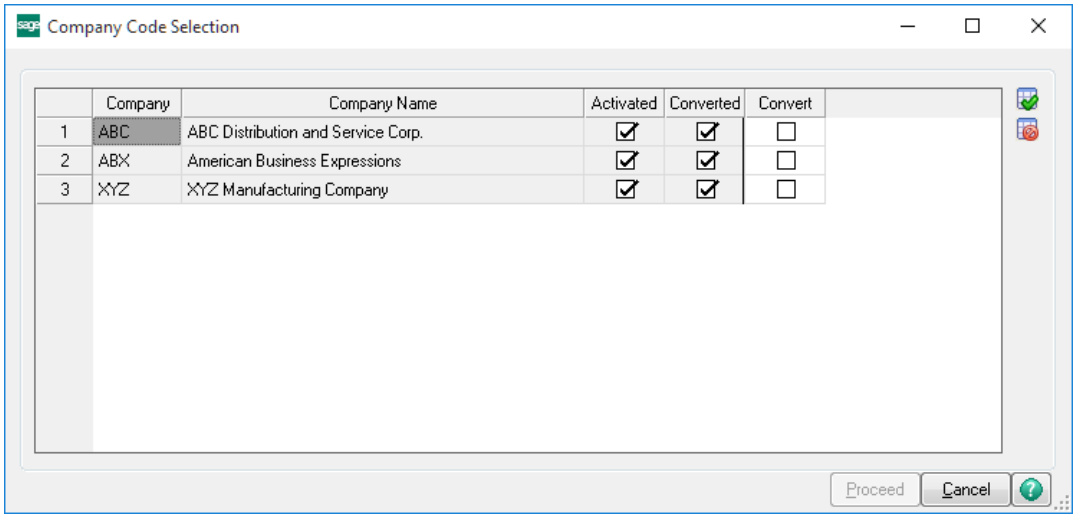
Multi-Convert Data: Multiple Companies can be converted at the same time for a given Enhancement. (*If you have a large number of Companies to convert, please do in batches of 20 or fewer due to memory limitations.)*



Help: The Help button, located at the bottom right of the window, opens an HTML help file.

Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system. (for more information see Uninstall DSD Enhancements)

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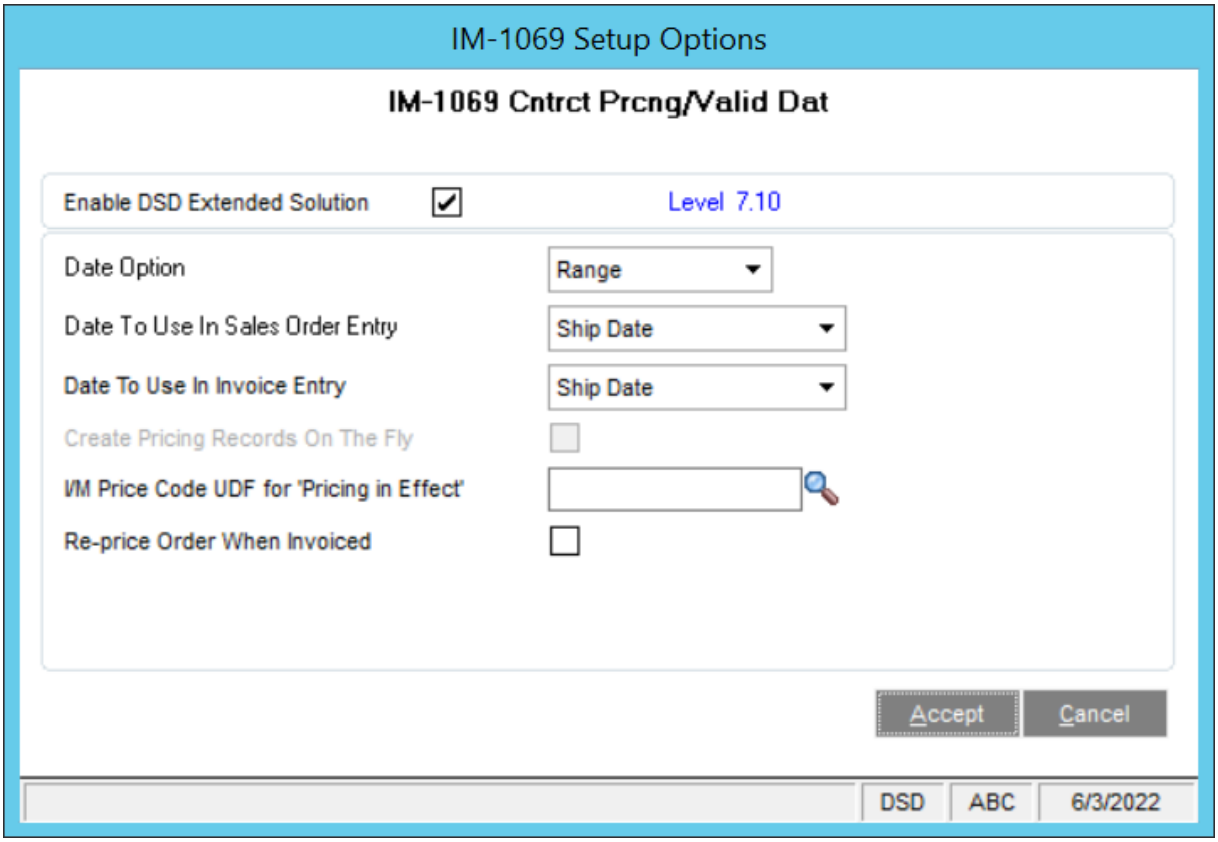
Section C: Setup

Upon completion of software installation, you will need to access the DSD Extended Solutions Setup from the Inventory Management Setup menu. Select this part number and the Setup screen for this Extended Solution will appear. Check the 'Enable DSD Extended Solution' box to activate this Extended Solution.



Answer the following prompts:

Date Option: Select 'Valid Through' to make prices valid through the date entered. Select 'Valid From' to make the prices valid from the date entered. Select 'Range' to enter both a Valid From and Valid Through date.

Date to Use in Sales Order Entry: Choose Ship Date, Order Date, Line Promise Date or Customer Assigned. If customer assigned is chosen, in Customer Maintenance there will be a new option to choose Ship Date, Order Date or Line Promise Date.

Date to Use in Invoice Entry: Choose Ship Date, Invoice Date or Customer Assigned. If customer assigned is chosen, in Customer Maintenance there will be a new option to choose Ship Date or Invoice Date.

The following option will only be available if the Date Option is set to 'Valid From':

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Create Pricing Records on The Fly: Check this box to create a 'Valid From' Customer pricing record automatically from Order Entry and Invoice Entry; it will occur for any Item which does not currently have a pricing record of this type in effect.

'Pricing in Effect' UDF: Specify an IM_PriceCode check-box type UDF which denotes that this pricing record is in effect (Note: the value of this UDF must be "N" for this pricing record to be ignored).

Re-Price Order When Invoiced: Check this box to re-price the Unit Price on the lines of the sales order as part of invoicing the order. It will use the date specified for the Setup option: 'Date to Use in Invoice Entry'.

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

Role Maintenance

The following have been added to the Inventory Management, Miscellaneous Tasks:

- Contract Price Change Utility
- Contract Price Purge Utility

The following has been added to the Inventory Management, Reports/Forms:

Customer Pricing Report

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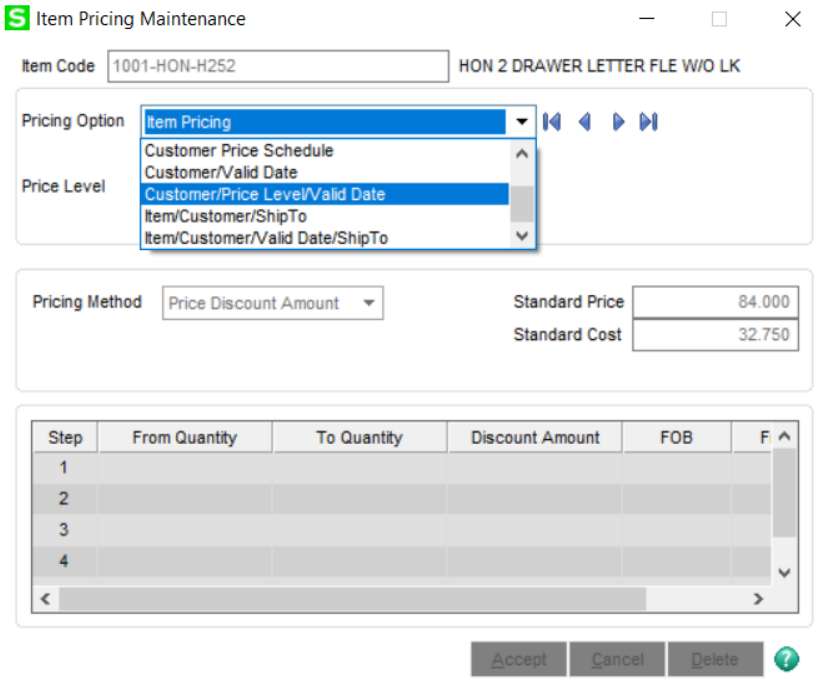
Section D: System Operations

Item Pricing Maintenance

Inventory Item Pricing has been modified with five additional Pricing Options Customer/Valid Date, Price Level/Valid Date, Customer/Price Level/Valid Date, Customer/Ship To and Customer/Valid Date/Ship To. If one of these is selected you will be prompted for a Customer Number, Price Level, or both, and/or Valid Date/Ship To ('Valid From,' Valid Through,' or a range, depending on Setup).

Multiple date ranges for an item/customer are supported, but they cannot have the same starting date. If you have specified a CM-1002 UDF in Setup, you will check that UDF to denote which pricing record is in effect.



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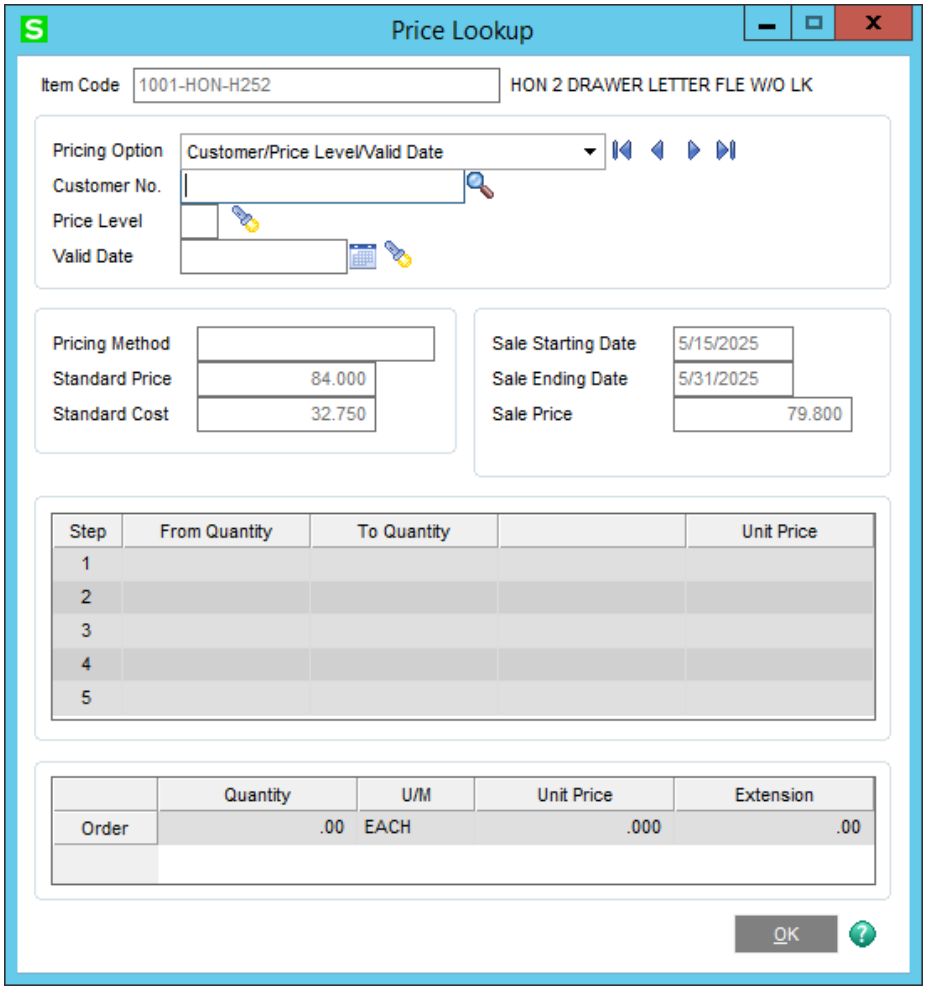
Inventory Maintenance / Inquiry - Price Lookup

Price Lookup has been modified to support the five additional Pricing Options.



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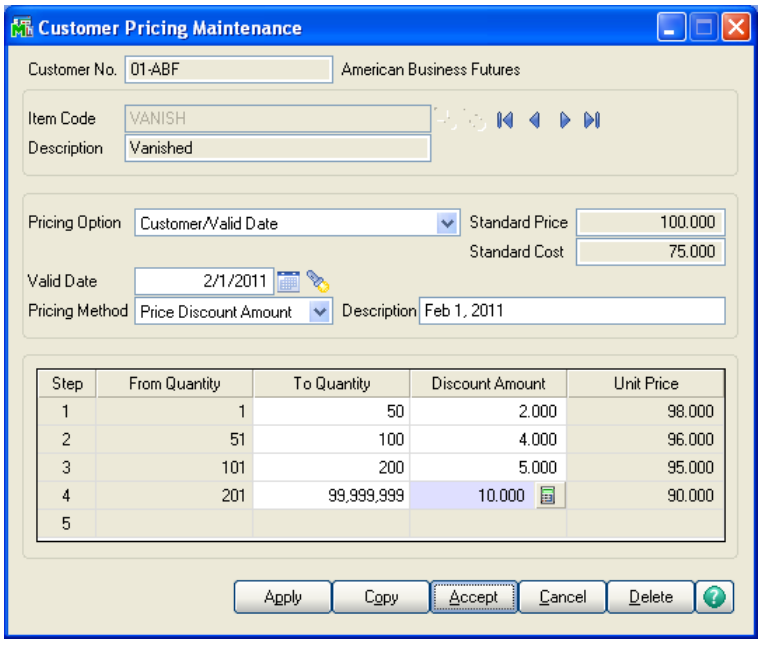
Customer Maintenance

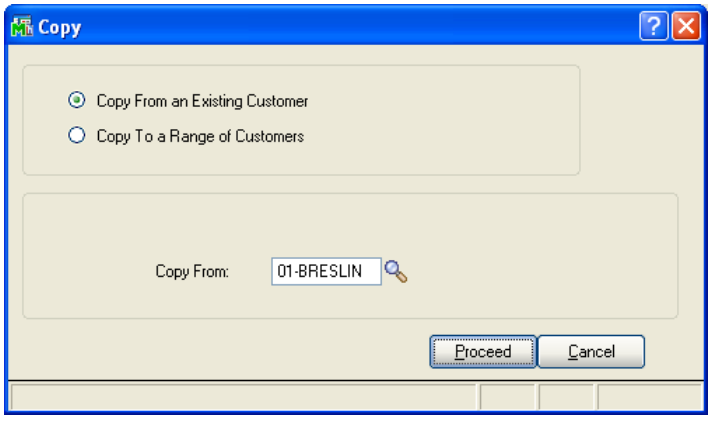
The additional Pricing Options are supported from within Customer Maintenance, Customer Item Pricing Maintenance.



Click the 'Copy' button and you will be prompted for the type of copy to be performed. This screen supports the following options:

- Copy all item pricing records from another customer to the current customer
- Copy the current item pricing record to a range of customers
- Copy all customer item pricing records for the current customer to a range of customers

If you select 'Copy From an Existing Customer', then you will have access to a single Customer Number field.



All item pricing records of the current Customer will be removed and all item pricing records of the 'From' Customer will be replicated for the To Customer.

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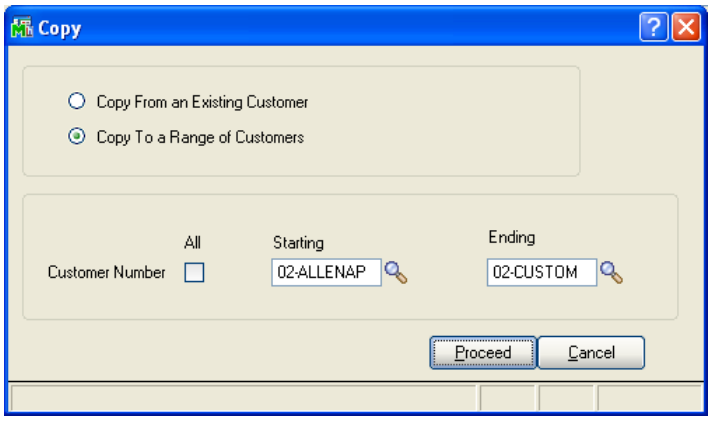
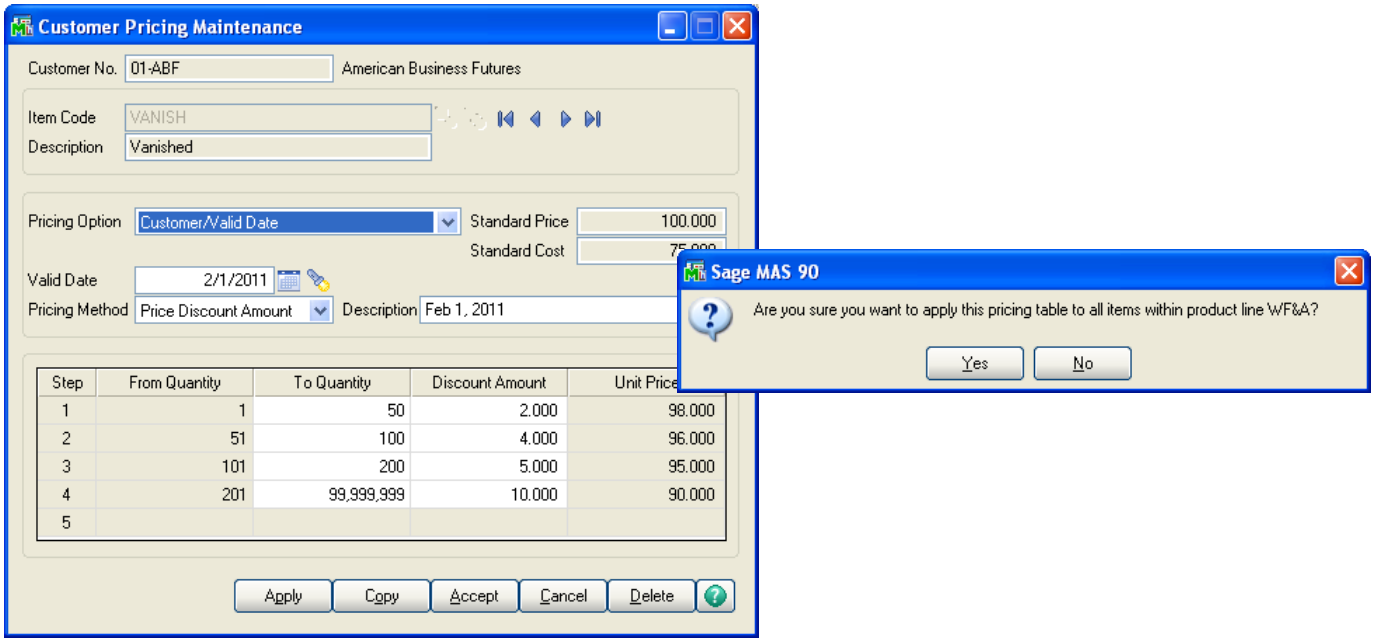
Select 'Copy To a Range of Customer' and you will be able to enter a range of customer numbers to receive the pricing records of the current Customer.



If no item is specified in the Customer Item Pricing Maintenance screen, *all* Customer Item Pricing records of the Copy To Customers will be removed and *all* Customer Item Pricing records of the current Customer will be replicated for the To Customers.

If an Item is specified in the Customer Item Pricing Maintenance Screen, then only Customer Item Pricing records that reference that Item will be replicated for the To Customers. You will be prompted to confirm the operation before the program proceeds to copy pricing information.

An 'Apply' function has been added to Customer Pricing Maintenance.



After an existing record is selected or a new record is set up, click the 'Apply' button to create pricing records for all items that belong to the same Product Line, regardless of Price Code, overriding whatever pricing may already be in effect for the Item/Customer. If a 'Pricing in Effect' UDF is specified in Setup, it will be copied to other items' pricing records. The 'Apply' function is not available when the pricing method is 'Override.'

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Sales Order Entry and Invoice Entry

The hierarchy that Sales Order will use in determining the Unit Price is as follows:

1. Standard Sage 100 Sales/Promotional Pricing
2. Customer / Ship-To / Valid Date range
3. Customer / Valid Date range
4. Item Code / Price Level / Valid Date range
5. Standard Sage 100 Customer Pricing
6. Standard Sage 100 hierarchy continues

If one of these pricing methods is detected and the specified date matches the Valid Date, the new pricing will be used.

- If you chose to use 'Valid Through,' the Date must be less than or equal to the Valid Date.
- If you chose to use 'Valid From,' the Date must be greater than or equal to the Valid Date.
- If you chose to use 'Range,' then the Date must fall between the 'From' and 'Through' Date.

If a 'Pricing in Effect' UDF is specified in Setup, the pricing record will be used only if the Date is valid and the IM_PriceCode UDF is checked.

A new checkbox field has been added to the secondary grid of Sales Order entry 'Skip Reprice'. If this field is checked this Sales Order Line will not be repriced when the Sales Order is repriced during Invoice Data Entry.

The Customer/Valid Date Pricing table will display in the line's Item Price Lookup.

If you chose to use the Line Promise Date as the date for Sales Order Entry, the program will update the Unit Price every time the Line Promise Date is changed.

If multiple pricing records apply to the Order Date, the program will use the first record it finds.

Contract Price Lookup

A **'Contract Price Lookup'** option has been added to the Customer Last Purchase History drop list button. The lookup includes all items that have current or future contract pricing set up for the customer. **Note:** This lookup does not support Price Level/Valid Date or Customer/Price Level/Valid Date records.

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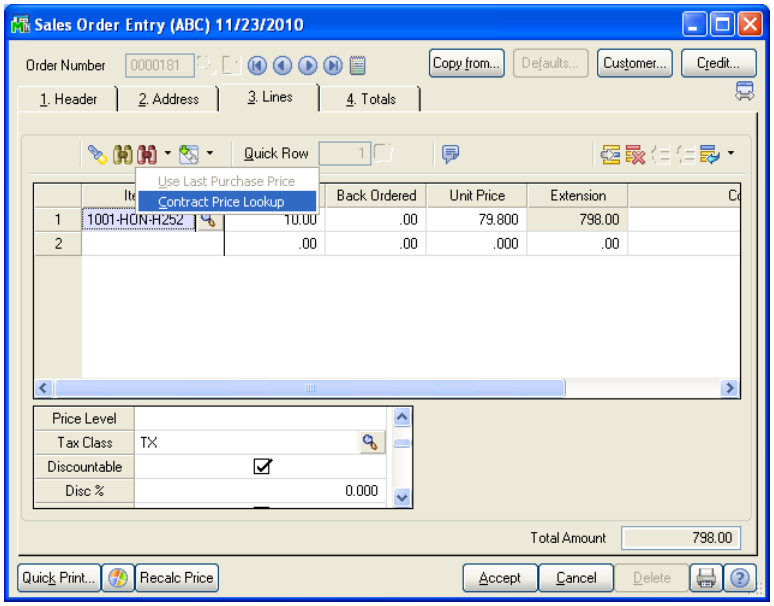
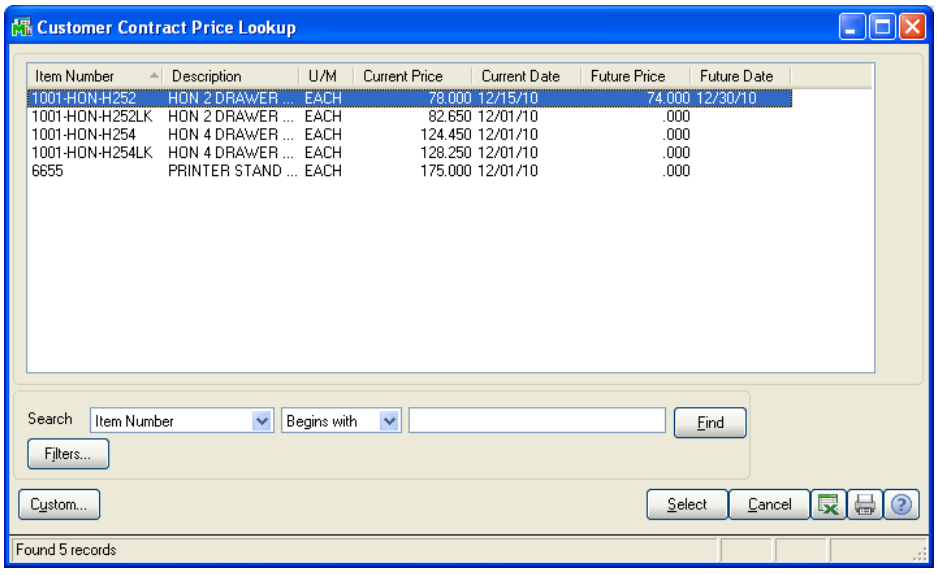


The following are included in the 'Contract Price Lookup' columns:

- Item Number
- Description
- Standard Unit of Measure
- Current Price - the current contract pricing in effect based on workstation date.
- Current Date - first tier unit price
- Future Price - the next contract pricing
- Future Date - first tier unit price



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Create Pricing Records On The Fly

If you checked the option for 'Create Pricing Records on The Fly' then during Order Entry and Invoice Entry, any Inventory Item added to the lines which does not currently have a pricing record in effect for this Customer will have one created using:

- Customer/Valid Date type pricing record
- the sales order (invoice) date as the 'Valid From' date
- the Unit Price on the line
- one qty tier (from 1 to infinity)

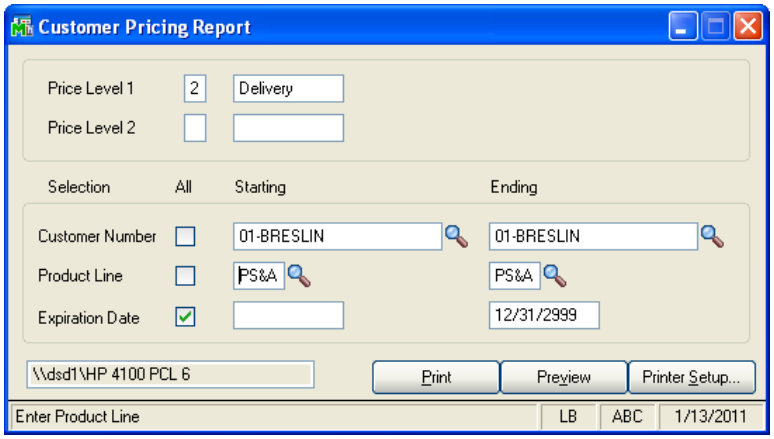
They will automatically be created when you click 'OK' on the line.

The features of this Extended Solution are not available in Shipping Data Entry.

If you checked the option for 'Re-Price Order When Invoiced', the Unit Price on the lines of the order will be re-priced prior to the order detail being pulled into Invoice Entry. It will use the date option defined for the 'Date to Use in Invoice Entry' in Setup. Changes will be to the Sales Order, therefore, if the Invoice is cancelled or deleted the Sales Order will retain the modified pricing.

Customer Pricing Report

This report only prints pricing by Customer/Price Level/Valid Date. You can select two Price Levels to print and the description you wish to use on the report.



The report is selected by a range of Customer Numbers, Product Lines, and Expiration Dates. The report is sorted by Customer Number/Item Number and page breaks by Customer Number.

A heading, but no total, will print when the Product Line changes. The report will include all items within the range, even those that do not have Customer Pricing set up. If you chose to use 'Valid From' or 'Valid Through,' the valid date must be within the range for the records to print. If you chose to use 'Range,' the ending date must be within the range for the record to print.

The following data elements will be included: Customer Number, Customer Name, Product Line, Product Line Description, Standard Price, Price Level 1 Pricing Method, Price Level 1 Unit Price, Price Level 1 Expiration Date, Price Level 2 Pricing Method, Price Level 2 Unit Price and Price Level 2 Expiration Date.

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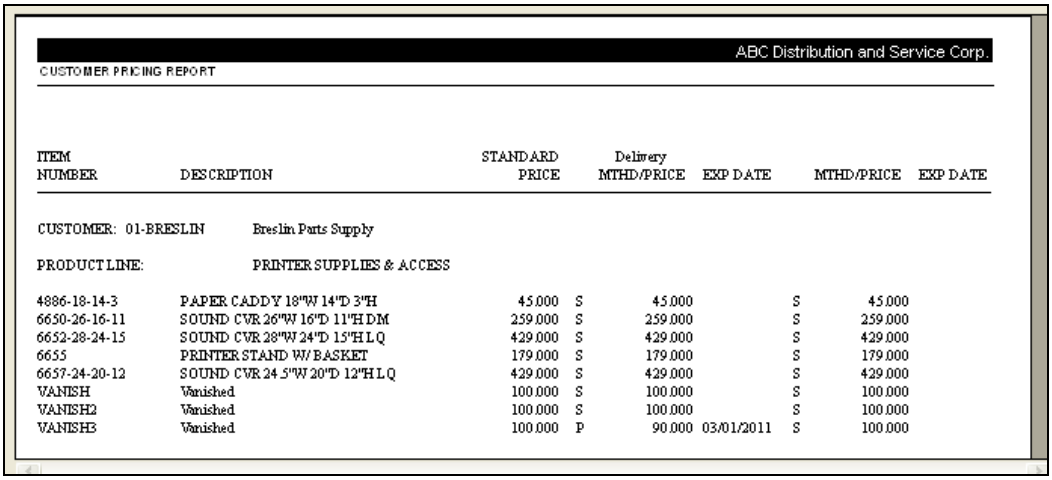
The Expiration Date is the 'Valid From' or 'Valid Through' date. If you chose to use 'Range,' the Expiration Date is the ending date. The Pricing Method is the Inventory Pricing Method used to determine the price. It may be 'S' – Standard Pricing, 'D' - Price Discount Percent, 'P' – Price Discount Amount, 'C' – Cost Markup percent, 'M' – Cost Markup Amount or 'O' – Price Override.



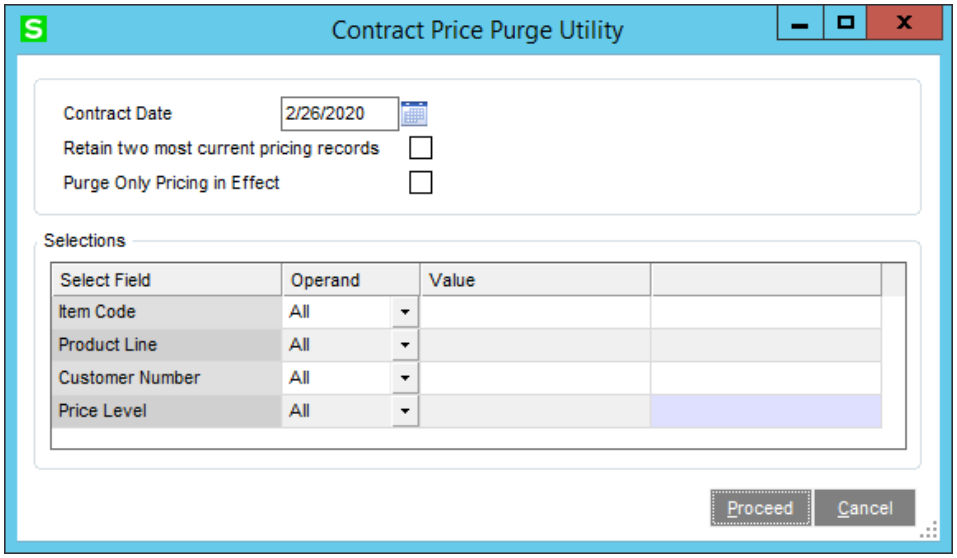
ABC Distribution and Service Corp.

CUSTOMER PRICING REPORT

ITEM NUMBER	DESCRIPTION	STANDARD PRICE		Delivery MTHD/PRICE	EXP DATE		MTHD/PRICE	EXP DATE
CUSTOMER: 01-BRESLIN	Breslin Parts Supply							
PRODUCT LINE:	PRINTER SUPPLIES & ACCESS							
4886-18-14-3	PAPER CADDY 18"W 14"D 3"H	45.000	S	45.000		S	45.000	
6650-26-16-11	SOUND CVR 26"W 16"D 11"H DM	259.000	S	259.000		S	259.000	
6652-28-24-15	SOUND CVR 28"W 24"D 15"H LQ	429.000	S	429.000		S	429.000	
6655	PRINTER STAND W/ BASKET	179.000	S	179.000		S	179.000	
6657-24-20-12	SOUND CVR 24.5"W 20"D 12"H LQ	429.000	S	429.000		S	429.000	
VANISH	Vanished	100.000	S	100.000		S	100.000	
VANISH2	Vanished	100.000	S	100.000		S	100.000	
VANISH3	Vanished	100.000	P	90.000	03/01/2011	S	100.000	

Contract Price Purge Utility

This utility is found on the Setup Menu in Inventory Management. To delete the Contract Pricing Record, Specify a Contract Date and select a range of Item Codes, Product Lines, Customer Numbers and Price Level.



The utility will delete Item Pricing records (referencing both Price Levels and Customers) where a Valid From/Valid through date (or both if you selected a date range) is earlier than the specified Contract Date. No printed log will be produced.

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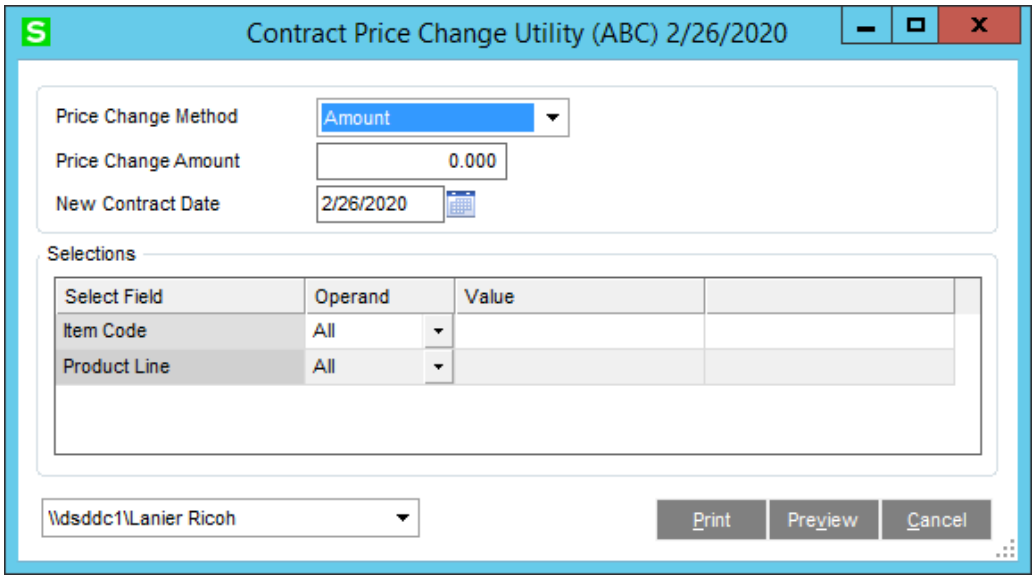
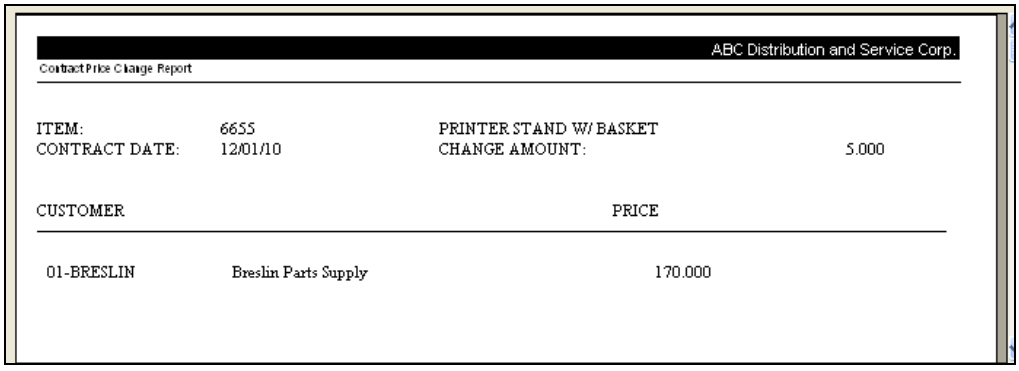
Contract Price Change Utility

This utility will be available if you have specified 'Valid From' or 'Valid Through' for your Date option in Setup. It will only apply to 'Customer/Valid Date' type Contract Pricing records with a Pricing Method of Override.

This utility screen will prompt for a Price Change Method, a Percentage/Amount (supports positive and negative numbers), a New Contract Date, and a range of Item Codes and Product Lines.



When you click 'Apply' on the Contract Price Change Utility Screen, the program will search Contract Pricing looking for 'Customer/Valid Date' records with a price method of Override for the Item Number specified. A new pricing record for the Item/Customer will be created using the New Contract Date noted on the selection screen. The price override for the new record will be obtained by adding or subtracting the Price Change Amount from the selection screen to the last record it finds and to all of the tiers in that record. After the new pricing records are created, a report will print noting all the Customers affected and the new price from the first pricing tier.



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NOTE: If Extended Solution IM-1049: *Vendor Rebates* is installed and enabled, you can set up Vendor Rebates in the contract pricing table. Please refer to the IM-1049 product documentation for more information about Vendor Rebates.

If Extended Solution SO-1381: *Inventory Item Unit Cost by Line in Order Entry* is installed and enabled, you can set up Unit Cost in the Customer/Valid Date or Customer/Price Level/Valid Date pricing table. Please refer to the SO-1381 product documentation for more information about this Unit Cost field.

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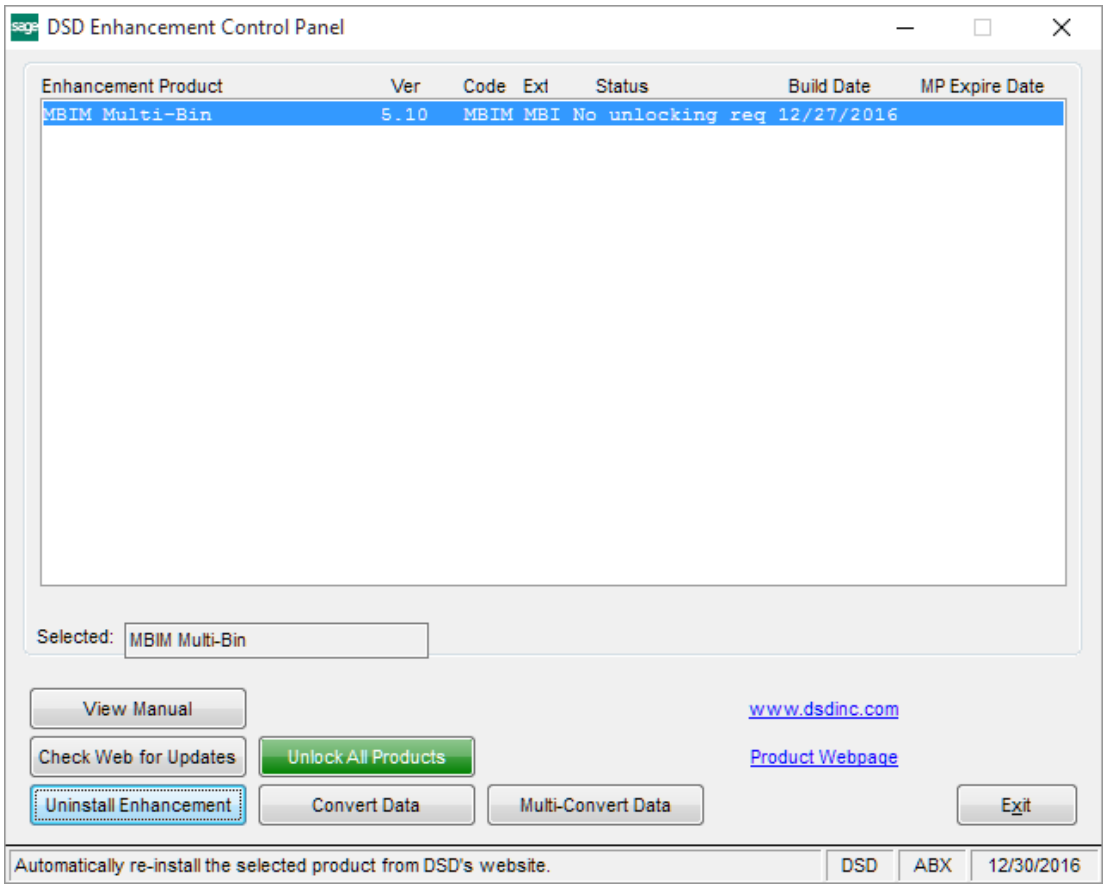
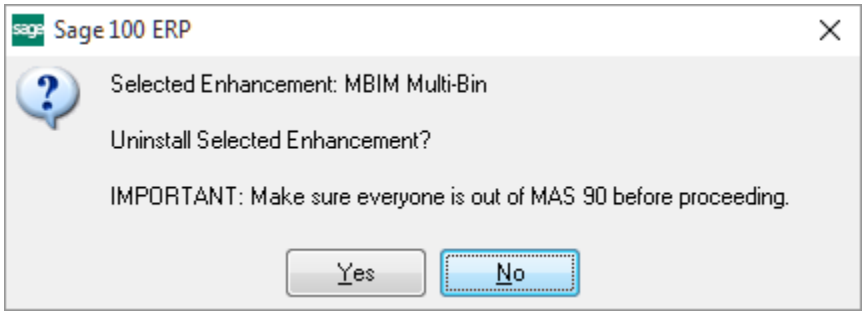
Section E: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.



When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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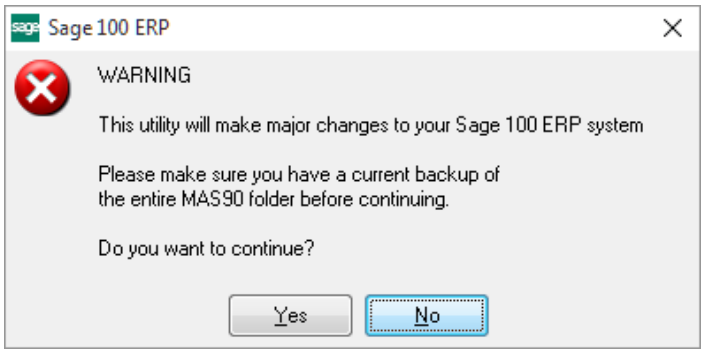
The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.



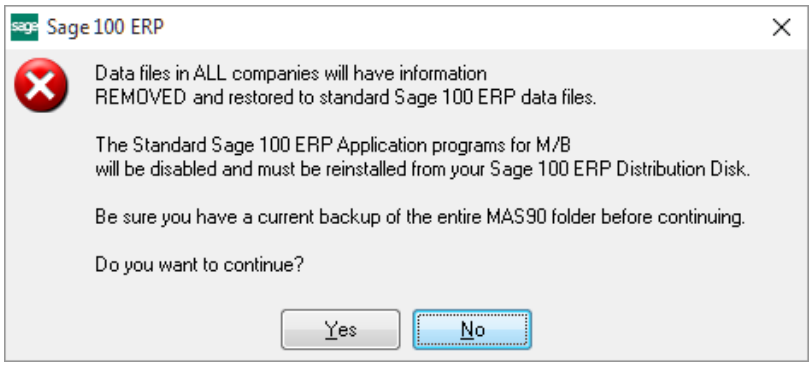
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

A message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

The following message box will appear, displaying the final warning message.



Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process. At this point, the DSD Enhancement will be removed from the Sage 100 system.

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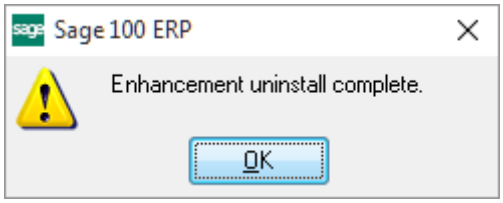
After completion of the Uninstall, the following message box will appear. Select OK to continue.



Now that the Uninstall process is completed, you must:

- Reinstall the applicable standard Sage 100 modules
- Reinstall the latest Sage 100 Service Pack/Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard Sage 100 module(s).

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