DSD Business Systems

Sage 100 Enhancements

POLM

Purchase Order Line Move

Version 7.40

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Purchase Order Line Move User's Manual
Version 7.40

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Table of Contents

SECTION A: INTRODUCTION 5

WEB RESOURCES 5
SUPPORT 5
PURCHASE ORDER LINE MOVE FEATURES 6

SECTION B: GETTING STARTED 7

REQUIRED LEVELS 7
INSTALLATION 7
DSD ENHANCEMENT CONTROL PANEL 8

SECTION C: SETUP 11

SECTION D: SYSTEM OPERATIONS 12

PURCHASE ORDER ENTRY 12

SECTION E: UNINSTALL DSD ENHANCEMENTS 15

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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

POLM Purchase Order Line Move:

http://www.dsdinc.com/enh/pages/POLM.htm

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.

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Exact sequence that caused the error, including menus and menu selections.
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.

Purchase Order Line Move Features

This DSD Enhancement to the Purchase Order module will allow lines from selected open purchase orders to be moved to the existing purchase order being entered.

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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
P/O	Y	7.40

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.

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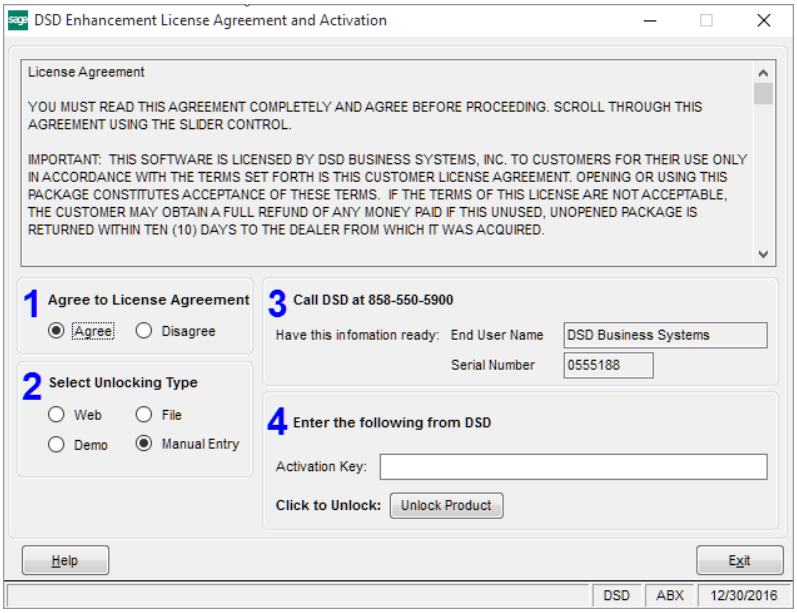
Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from 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.

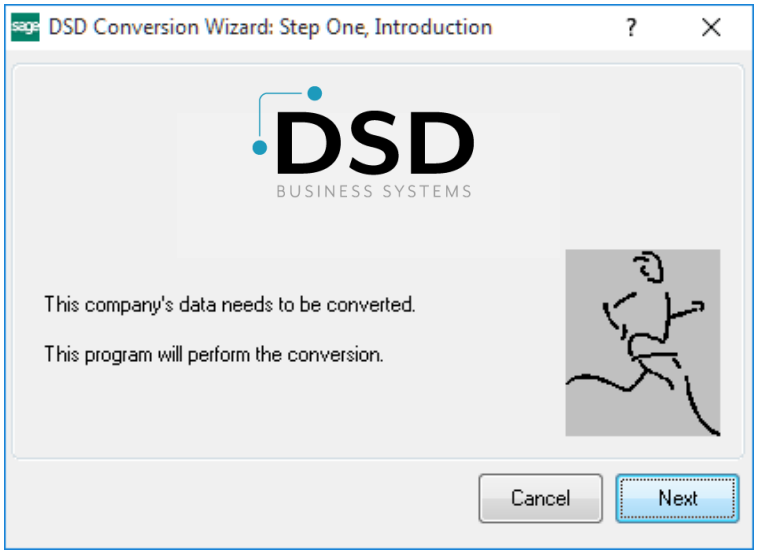
- *Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.*



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.*



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**.

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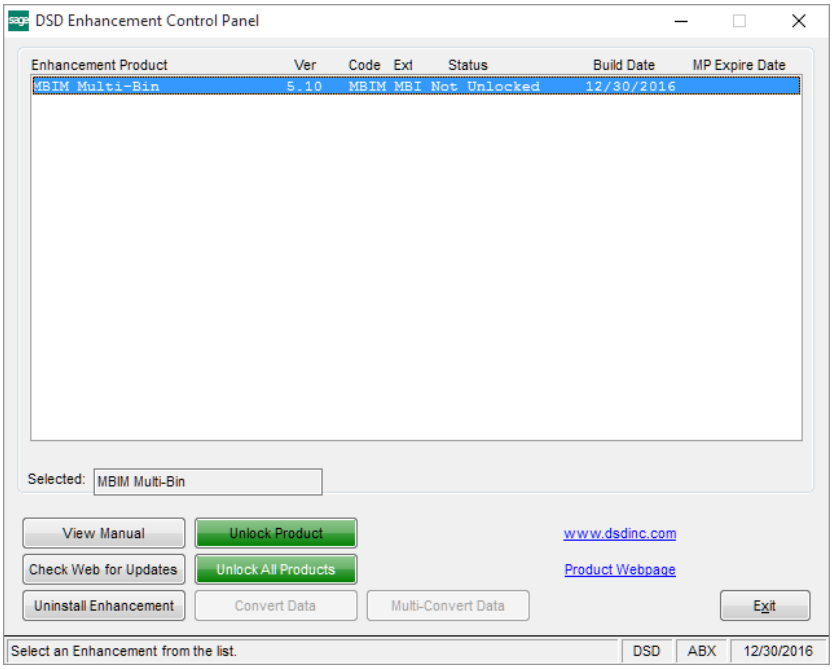
The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired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

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.)*

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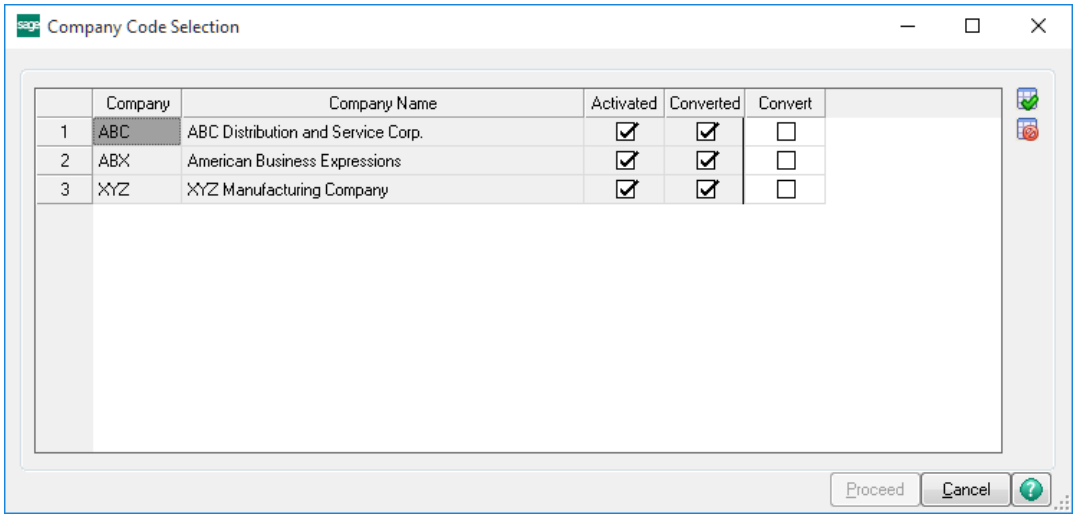

Help: The Help button, located at the bottom right of the window, opens an HTML help file.

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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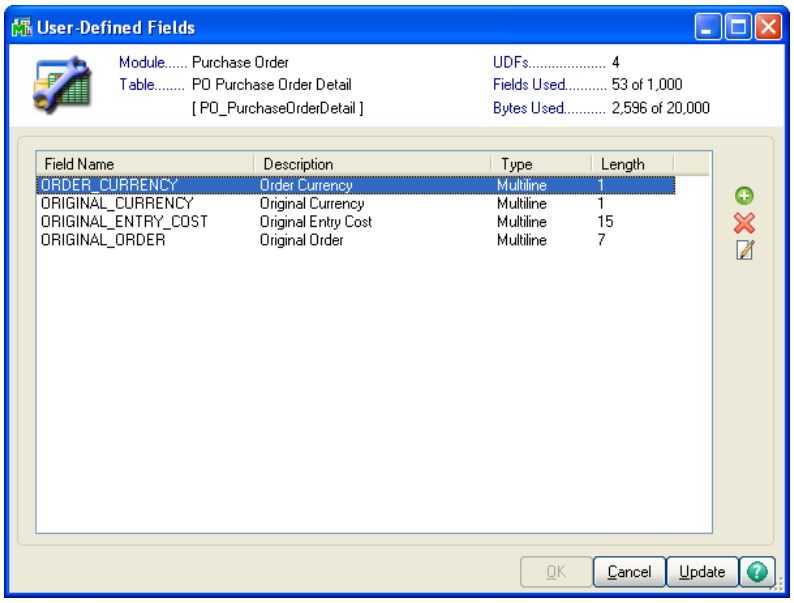
Section C: Setup

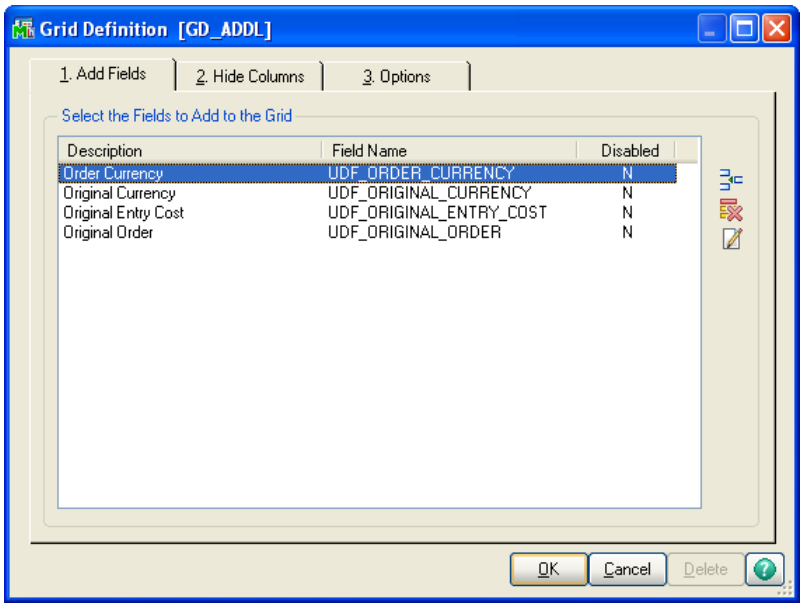
These User Defined Fields (UDFs) can be added in Custom Office through 'User-Defined Field and Table Maintenance' to support Multi-Currency calculations (but are not required):

PO Purchase Order Detail:

ORDER_CURRENCY – 1-char (not required)
ORIGINAL_ORDER – 7-char
ORIGINAL_CURRENCY – 1-char field (not required)
ORIGINAL_ENTRY_COST – numeric field



The UDF's can also be added to the Purchase Order Entry PLINES/PLINESW secondary grid in 'Customizer Selection':



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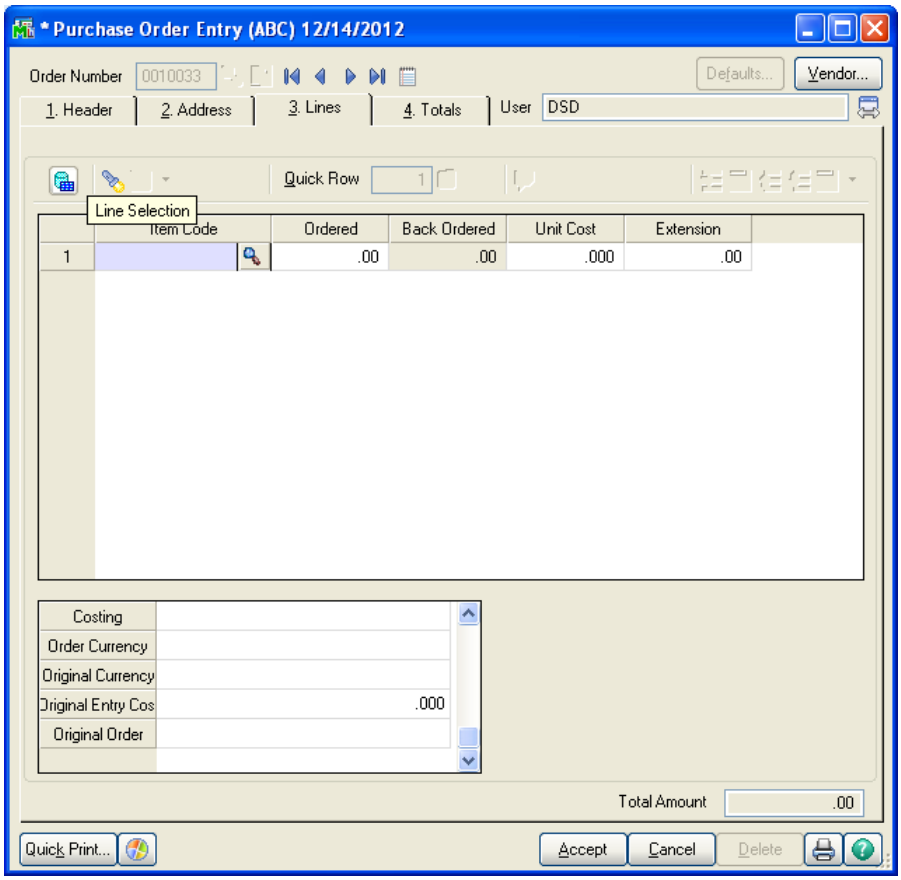
Section D: System Operations

Purchase Order Entry

A new “Line Selection” button has been added to the “3. Lines” panel of Purchase Order Entry.



When selected, a new “Purchase Order Line Move” panel will be displayed with the following:

Required Date (entry not required) – this date field can be entered by the user. If a date is entered, the Display Grid will filter records based on that Required Date. If the Required Date is left <blank>, then ALL PO lines for the same Vendor Number will be displayed, otherwise, only those lines that match the Required Date will be displayed.

Exchange Rate (displayed for entry only if **Order_ Currency** UDF exists)– this is a 6-6 numeric field that the user will enter for a daily exchange rate

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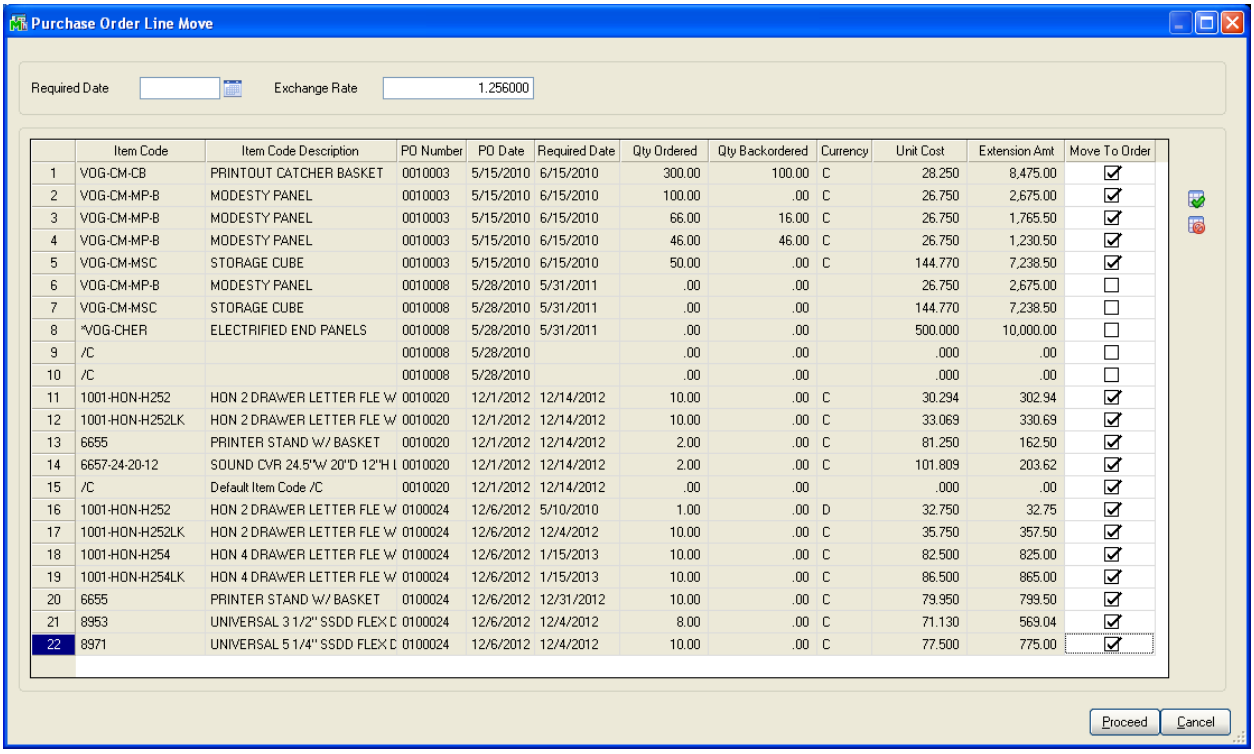

	Item Code	Item Code Description	PO Number	PO Date	Required Date	Qty Ordered	Qty Backordered	Currency	Unit Cost	Extension Amt	Move To Order
1	VOG-CM-CB	PRINTOUT CATCHER BASKET	0010003	5/15/2010	6/15/2010	300.00	100.00	C	28.250	8,475.00	☑
2	VOG-CM-MP-B	MODESTY PANEL	0010003	5/15/2010	6/15/2010	100.00	.00	C	26.750	2,675.00	☑
3	VOG-CM-MP-B	MODESTY PANEL	0010003	5/15/2010	6/15/2010	66.00	16.00	C	26.750	1,765.50	☑
4	VOG-CM-MP-B	MODESTY PANEL	0010003	5/15/2010	6/15/2010	46.00	46.00	C	26.750	1,230.50	☑
5	VOG-CM-MSC	STORAGE CUBE	0010003	5/15/2010	6/15/2010	50.00	.00	C	144.770	7,238.50	☑
6	VOG-CM-MP-B	MODESTY PANEL	0010008	5/28/2010	5/31/2011	.00	.00		26.750	2,675.00	☐
7	VOG-CM-MSC	STORAGE CUBE	0010008	5/28/2010	5/31/2011	.00	.00		144.770	7,238.50	☐
8	*VOG-CHER	ELECTRIFIED END PANELS	0010008	5/28/2010	5/31/2011	.00	.00		500.000	10,000.00	☐
9	/C		0010008	5/28/2010		.00	.00		.000	.00	☐
10	/C		0010008	5/28/2010		.00	.00		.000	.00	☐
11	1001-HON-H252	HON 2 DRAWER LETTER FLE W	0010020	12/1/2012	12/14/2012	10.00	.00	C	30.294	302.94	☑
12	1001-HON-H252LK	HON 2 DRAWER LETTER FLE W	0010020	12/1/2012	12/14/2012	10.00	.00	C	33.069	330.69	☑
13	6655	PRINTER STAND W/ BASKET	0010020	12/1/2012	12/14/2012	2.00	.00	C	81.250	162.50	☑
14	6657-24-20-12	SOUND CVR 24.5"W 20"D 12"H I	0010020	12/1/2012	12/14/2012	2.00	.00	C	101.809	203.62	☑
15	/C	Default Item Code /C	0010020	12/1/2012	12/14/2012	.00	.00		.000	.00	☑
16	1001-HON-H252	HON 2 DRAWER LETTER FLE W	0100024	12/6/2012	5/10/2010	1.00	.00	D	32.750	32.75	☑
17	1001-HON-H252LK	HON 2 DRAWER LETTER FLE W	0100024	12/6/2012	12/4/2012	10.00	.00	C	35.750	357.50	☑
18	1001-HON-H254	HON 4 DRAWER LETTER FLE W	0100024	12/6/2012	1/15/2013	10.00	.00	C	82.500	825.00	☑
19	1001-HON-H254LK	HON 4 DRAWER LETTER FLE W	0100024	12/6/2012	1/15/2013	10.00	.00	C	86.500	865.00	☑
20	6655	PRINTER STAND W/ BASKET	0100024	12/6/2012	12/31/2012	10.00	.00	C	79.950	799.50	☑
21	8953	UNIVERSAL 3 1/2" SSDD FLEX D	0100024	12/6/2012	12/4/2012	8.00	.00	C	71.130	569.04	☑
22	8971	UNIVERSAL 5 1/4" SSDD FLEX D	0100024	12/6/2012	12/4/2012	10.00	.00	C	77.500	775.00	☑

Display Grid – this grid will display records from Purchase Order Entry. All lines from other purchase orders for the same Vendor Number will be displayed in this grid. Lines will be sorted by PO Number/Line Number. The following are the columns that are displayed:

1. Item Code
2. Item Description
3. PO Number
4. PO Date
5. Required Date
6. Qty Ordered
7. Qty Back Ordered
8. Order Currency – (only displayed if PO Detail UDF exists)
9. Unit Cost
10. Extension
11. Move to Order – enabled checkbox that the user may select

All columns are disabled, except for the last column.

The user may select any of the lines to MOVE to the existing order.

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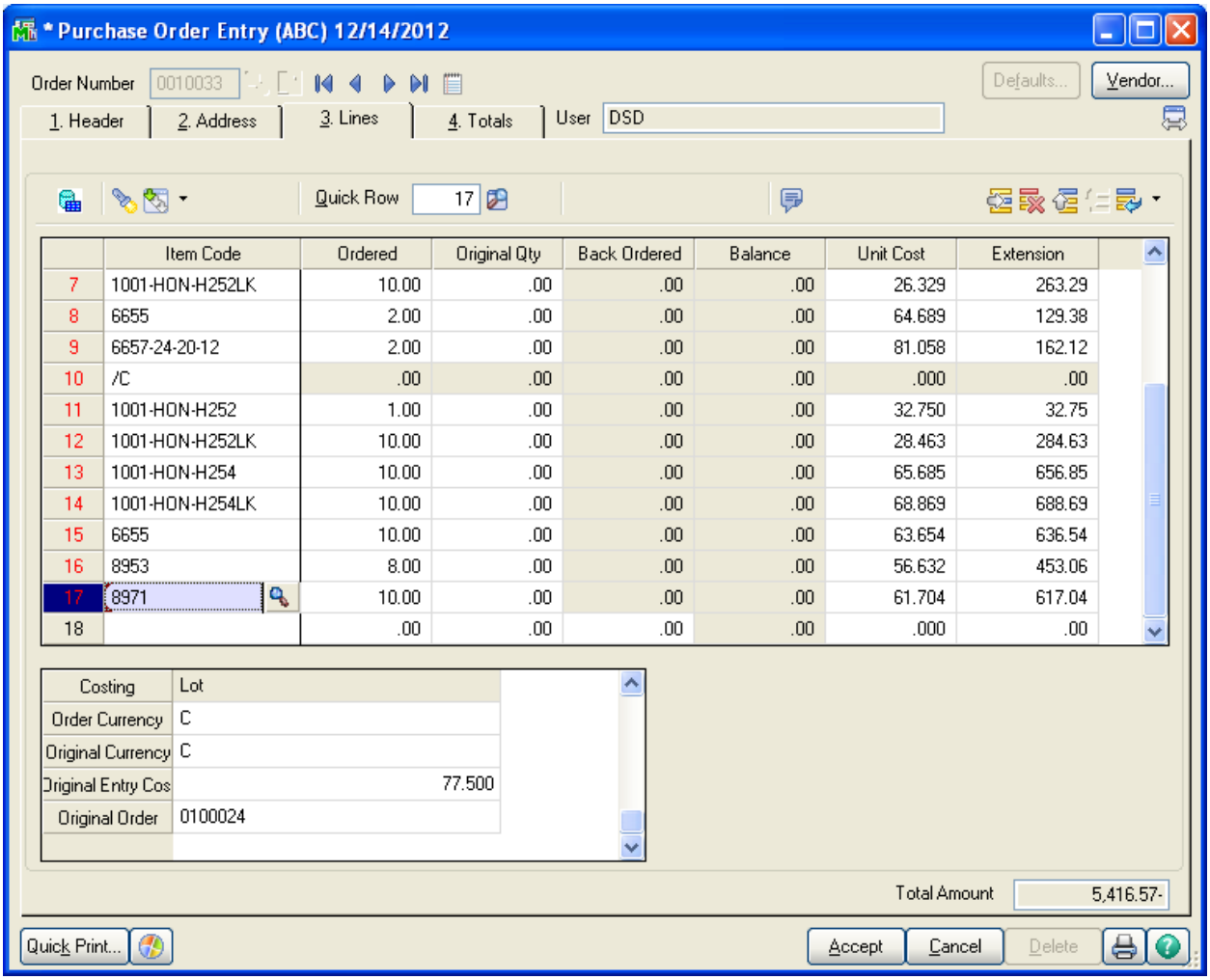

If the **Order_ Currency** UDF exists, and if one of the lines that is moved has a PO Detail UDF "ORDER_CURRENCY" NOT set to " " or "D", then the Unit Cost will be **divided by the Exchange Rate** field on the panel, and that line's Unit Cost will be set to that amount.

The new ORIGINAL_ORDER UDF will be set to the Purchase Order that was moved from.

If the **Order_ Currency** UDF exists, then the new ORIGINAL_CURRENCY UDF will be set to the ORDER_CURRENCY UDF from the original Purchase Order.

The new ORIGINAL_ENTRY_COST UDF will be set to the Unit Cost field from the original Purchase Order (prior to recalculation on Exchange Rate).

PO lines will be added to the new PO **in the exact order as they appear on the grid**. As the lines are added to the new Purchase Order, they will also be removed from the Original Order. When this occurs, the Original Order will be recalculated for Totals & Tax. The Original Order will be deleted only if **no lines (including comment lines) remain** after lines are moved from it.

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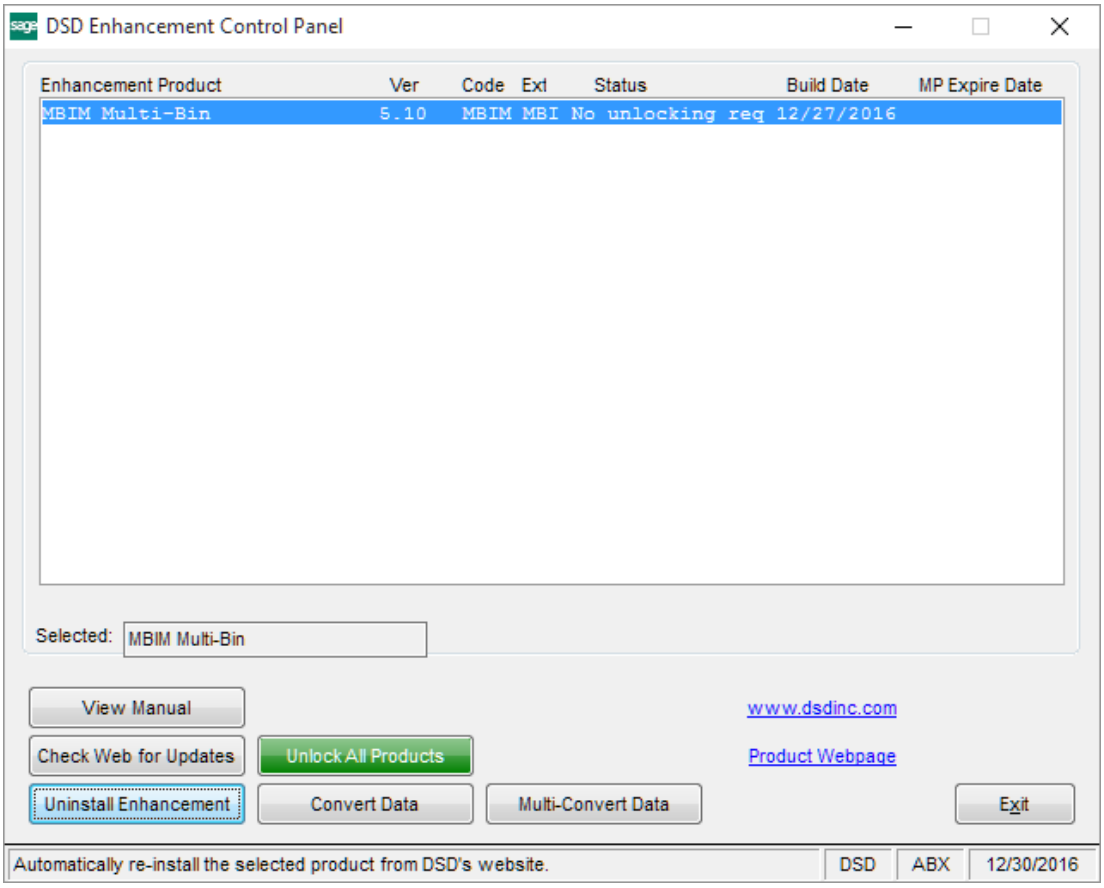
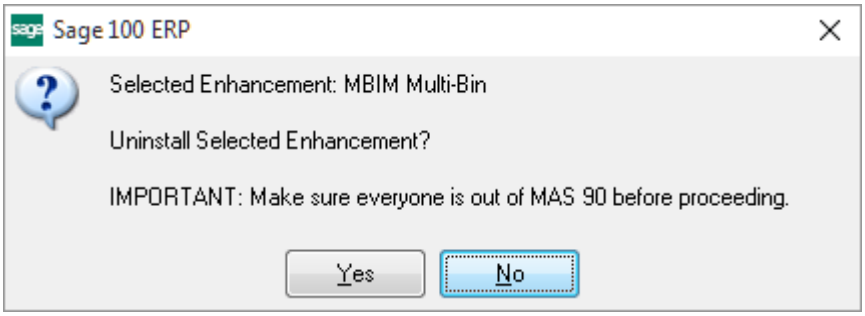
Section E: Uninstall DSD Enhancements

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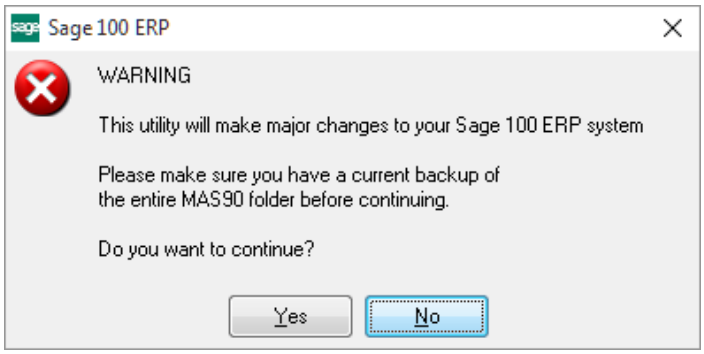
The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.



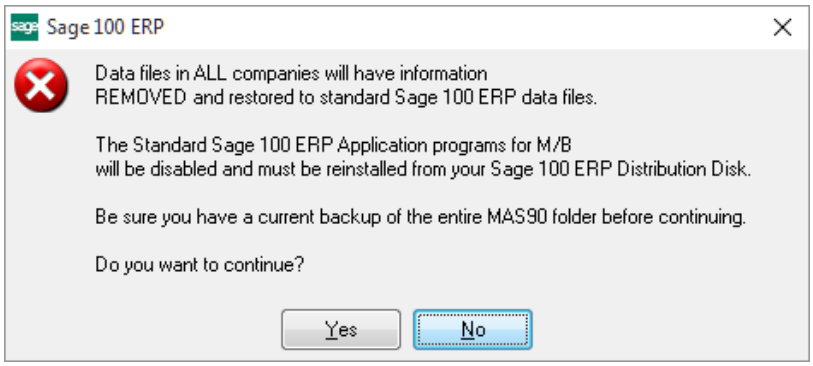
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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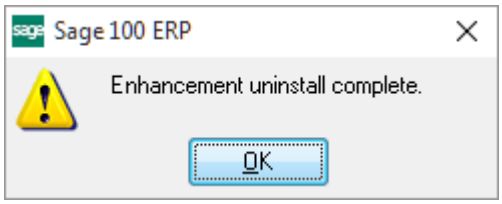
After completion of the Uninstall, the following message box will appear. Select OK to continue.



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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