DSD Business Systems

Sage 100 Enhancements

POLS

Purchase Order/Receipt Line Sorting Options

Version 7.30

sage
Certified Solution

sage GOLD
Development Partner

Information in this document is subject to change without notice.

Purchase Order/Receipt Line Sorting Options User's Manual
Version 7.30

14 October, 2024

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Table of Contents

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*

POLS Purchase Order/Receipt Line Sorting Options:

http://www.dsdinc.com/enh/pages/POLS.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.*
> *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 remotely or by some other to duplicate the system.

Purchase Order/Receipt Line Sorting Options Features

With this DSD Extended Solution, Purchase Orders and Purchase Order Receipt Entry lines may be sorted by:
- Item Number
- Warehouse/Bin Location/Item Number
- Item Category Code
- Item Description
- Product Line/Item Number
- Item Number/PO Detail UDF

The Sort may be set to occur during the conversion of a Purchase Order to a Receipt, after exiting the Lines section of an Order or Receipt, or after exiting a Purchase Order.

The Custom Office module must be Activated.

Section B: Getting Started

CAUTION

•**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**	7.30
I/M	**Y**	7.30

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 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**.

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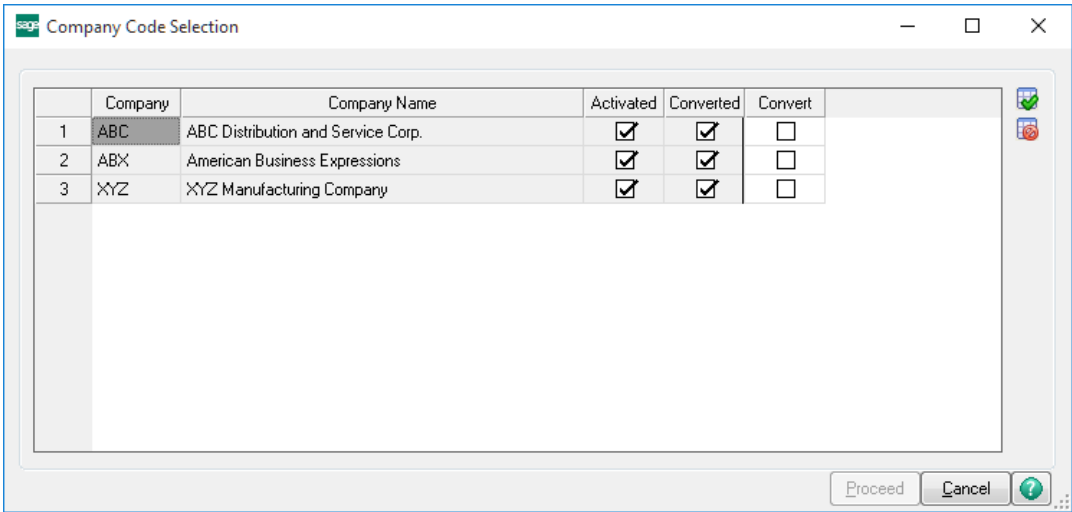
Help: The Help button, located at the bottom right of the window, opens an HTML help file.

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)

Section C: Setup

Upon completion of software installation, you will need to access the POLS Setup Options from the Purchase Order Setup menu. Select this part number and the Setup screen for this Extended Solution will appear. Check the 'Enable' box to activate this Extended Solution.

Answer the following prompts:
Sort By: Select from the drop box the order in which you want the lines sorted:
- Item Number
- Warehouse/Bin Location/Item Number
- Item Category Code
- Vendor Number
- Item Description
- Product Line/Item Number
- Item Number and P/O Detail UDF

If you selected the 'Item Number and P/O Detail UDF' sort option above you will have access to this option:
Sort UDF: Specify the String type P/O Detail UDF (maximum length of 30 characters). You will need to have a corresponding P/O Detail UDF setup as well in order for invoice sorting to take place.

Sort After: Select from the drop box the event after which you would like the sort activated:
- Purchase Order to Receipt Conversion
- Purchase Order Line Entry
- P/O Receipt Line Entry
- Purchase Order and P/O Receipt Line Entry
- Purchase Order Entry Completion
- Sort Button is Pressed Only

Prompt Before Sorting: Check this box if you wish to be prompted for line item sorting. Leave it blank if you want sorting to take place automatically.

If you checked Prompt before Sorting, you will have access to this option:

Default Response: Specify Yes or No as your default answer to the 'Do You Want To Sort Line Items On This Order?' prompt.

If you choose to sort by Item Category Code, the following prompts will be available:

Restrict Sorting by Vendor UDF: Specify the checkbox type Vendor UDF you wish to use to restrict item sorting. Only orders or receipts for vendors that have the specified Vendor UDF unchecked will be selected for item sorting. Leave this field checked if you do not wish to restrict the sorting by vendor.

Item Category: Enter the Item Category (1-4) you wish to use.

Item Category Value: Enter the value by which you want to select lines for sorting. Only Inventory items with the specified category value will be selected for sorting. Leave this field blank to sort inventory regardless of the category's value.

If you choose to sort by Item Number, Bin Location, Vendor Number, Line Item Description or Product Line / Item Number the following prompts will be available:

Comments Move with Associated Lines: Select from the drop box the method in which you want Comment lines to sort
- All: all comment lines (up to the next non-comment line) follow the previous line.
- First: only the first comment line follows the previous line
- None: if you do not want to have comment lines follow any previous lines

Move Unassociated Comments to The..: Select Top or Bottom from the drop box as the location in the grid for all non-associated comment lines to sort.

Leave Last Comment Line On Bottom: Check this box if you wish the last line in the grid when it is a comment line to remain where it is. Uncheck this box to treat this comment line according to your answers to the previous prompts.

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

Role Maintenance
The following Task has been added to Purchase Order, Setup Options:
- POLS Setup Options

Please review your security setup in Role Maintenance and make appropriate changes.

Section D: System Operations

Sorting by Warehouse/Bin Location/Item Number
Non drop ship lines without bin locations and warehouses will sort to the top of the grid. Then all non drop ship inventory lines will sort alphanumerically by warehouse, then bin location then item number. All Drop-Ship lines will sort to the bottom.

Sorting by Item Number
All inventory lines will sort alphanumerically by Item Number. Miscellaneous Items, Miscellaneous Charges, Special Items and comments not associated with an Item Number will sort next with Drop Ship Items sorted to the bottom.

Sorting by Item Description
All non comment lines will be sorted alphabetically by Item Description.

Sorting by Item Category Code
If you selected this option, and left the Category Value in setup blank, then all inventory items will be sorted in the order of their specified Inventory Category Code value.
If you selected this option, but defined a Category Value in setup then only those inventory items which contain that value will be *selected for sorting*, and will then sort alphanumerically in Item Number order. Any lines not specifically selected for sorting will sort to the bottom of the grid in the order in which they appeared on the grid prior to sorting.

Sorting by Product Line/Item Number
All inventory lines will sort alphanumerically first by Product Line then by Item Number. Miscellaneous Items, Miscellaneous Charges, Special Items and comments not associated with an Item Number will sort to the bottom of the grid in the order in which they appeared on the grid prior to sorting.

Sorting by Item Number and P/O Detail UDF
The lines on the order will be sorted in descending Item Code order, and within an Item Code, in descending UDF order for all non-comment line types.

Regardless of sort
Component lines created from Kit explosion will be placed directly below the corresponding Kit line, and will remain in their original order.
If you elected to prompt before sorting in setup, you will be prompted to sort line items on this invoice/order.
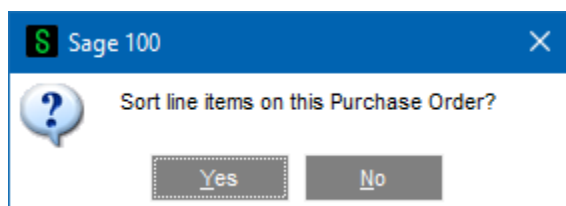
If you answer 'No' to this prompt, then the sorting of line items will not take place. If you answer 'Yes' to this prompt, then the line items will be sorted by the option selected during Setup.

If you are using the Item Category Code sort and have denoted a Vendor UDF you will only get this prompt if the vendor qualifies for sorting.

Purchase Order Entry / P/O Receipt of Goods Entry – Lines Tab
A new **button** has been added to the top of the lines tab of Purchase Order Entry and P/O Receipt of Goods Entry lines tab, When selected, the lines will auto-sort.

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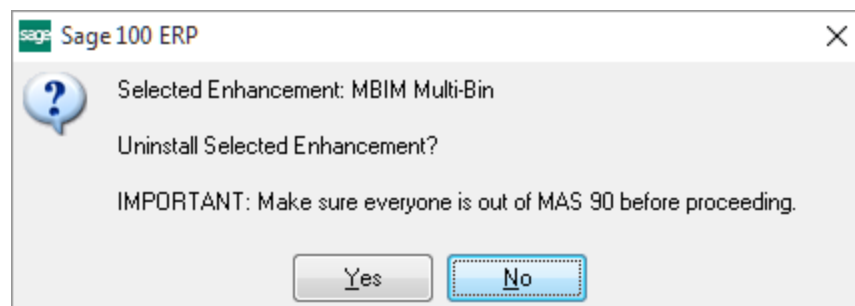
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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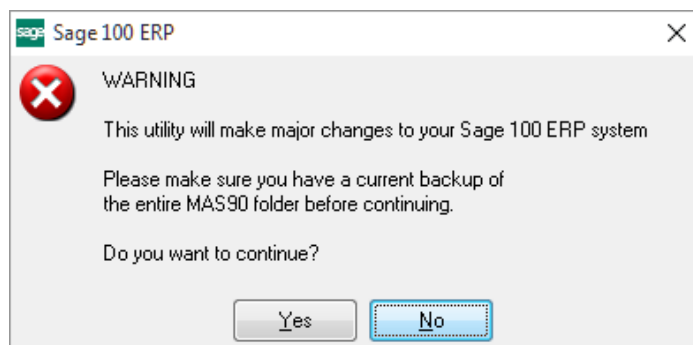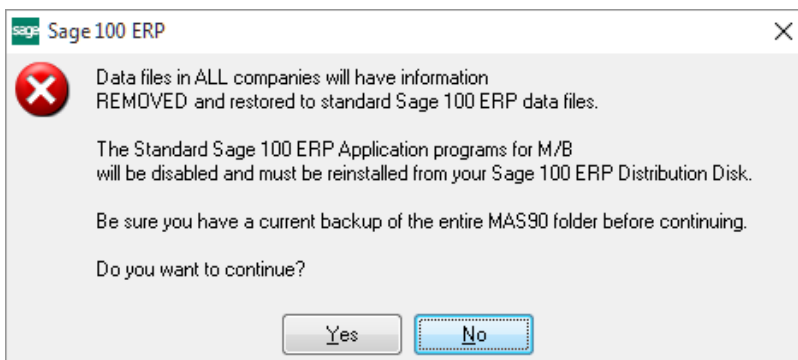
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

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).