

DSD Business Systems

Sage 100 Enhancements

S050

S/O Weight & User Defined Category Item

SO-1050

Version 7.20



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S/O Weight & User Defined Category Item User's Manual
Version 7.20

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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*

S050 S/O Weight & User Defined Category Item:

<http://www.dsdinc.com/enhancement/so-weight-and-user-defined-category-item-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.*

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.

S/O Weight & User Defined Category Item Features

This DSD Extended Solution adds a floating window to the Lines tab of Sales Orders and Sales Order Invoices. For Inventory Item lines it displays: Weight Each, Weight Extended (Quantity Ordered times Weight Each) and Order Total Weight. Additionally, you can elect to display one of the Inventory Category Codes and have the value in that field applied to the quantity ordered to produce: Each, Extended Amount and Order Total per Category. Note that respective Inventory Category Code Value must be numeric to accommodate applicable calculation(s) – Otherwise, the corresponding values displayed will be 0.

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
S/O	Y	7.20

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.*

- 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.

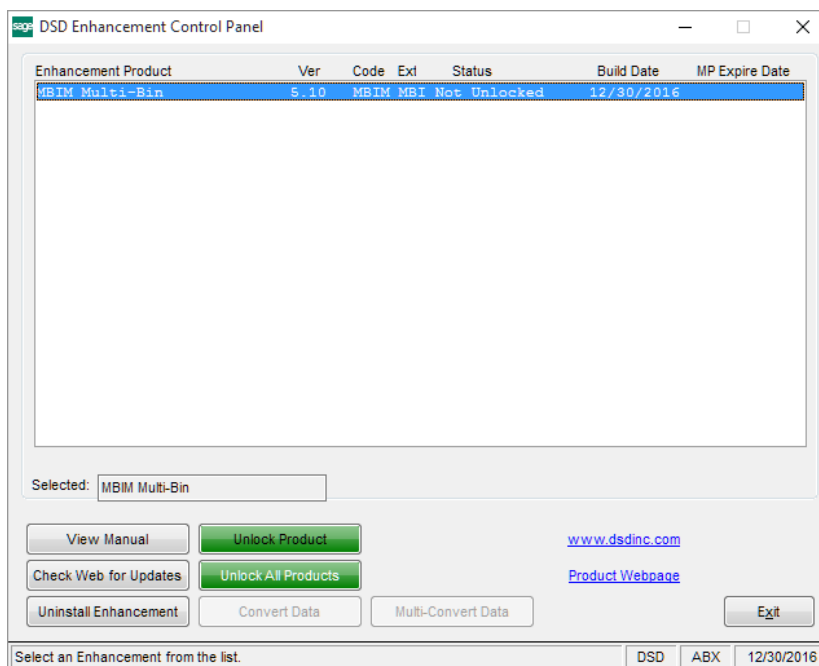
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct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

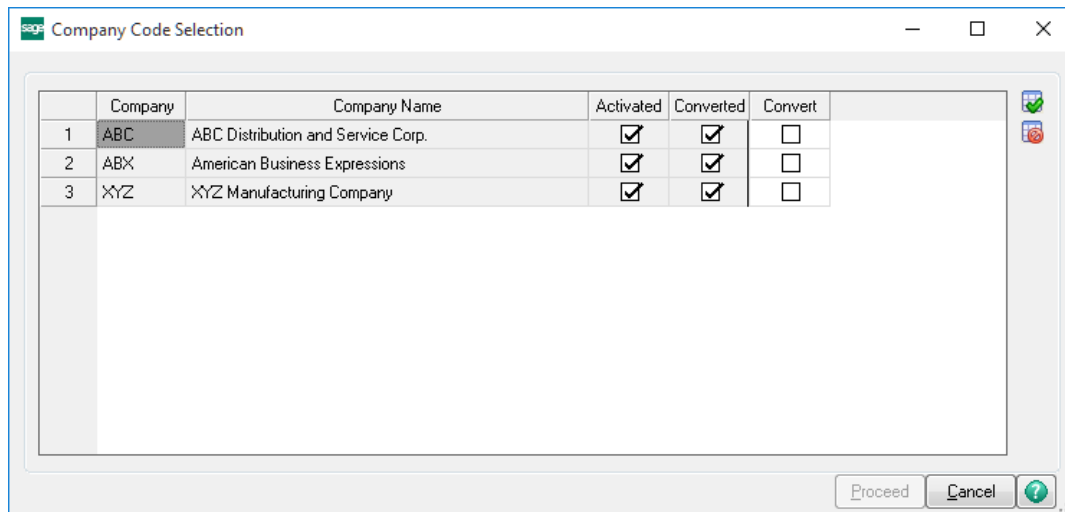
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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 DSD Extended Solutions Setup from the Sales Order 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:

Number of Decimal Places For Weight: Specify the number of decimal places to be used for Weight.

Number of Decimal Places For Extended Weight and Total: Specify the number of decimal places to be used for Extended Weight and Total.

Specify Which Inventory Category Item to Use: If you would like to add an Inventory Category to the pop up, select it here. If desired, a new name may be assigned.

If you specified an Inventory Category, you will have access to the next option:

Calculate Item Category Extension and Total: Check this box to calculate the Item Category Extension and Total, using the value in the item category as part of the calculations of both the Extended Category and Total Category.

If you checked the box to 'Calculate Item Category Extension and Total' you will have access to the next two options:

Number of Decimal Places For Item Category: Enter the number of decimal places to be used for Item Category.

Number Of Decimal Places For Extension and Total: Enter a number between zero and four for the number of decimal places to display.

Enhanced Kit Component Weight Calculation: Check this box if you wish to use Enhanced Kit Component Weight Calculation.

Force Entry if Item Weight is Zero: Check this box to force the user to fill in a Unit Weight if the value coming from Inventory is blank or zero.

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

Role Maintenance

The following Task has been added to Sales Order, Setup Options:

- DSD Extended Solutions Setup

Note: Because the Extended Solution does not have a workstation installation, SY_WDX needs to be copied into each workstation's SOA directory

Section D: System Operations

Inventory Maintenance

Both the Weight field and the specified Item Category field should contain only numeric values. If it contains any alpha values, the field value will be considered to be zero. Decimal points are allowed. The Weight 'unit of measure' and Category 'unit of measure' will need to be consistent across all inventory items.

Order and Invoice Entry of Inventory Items

During Sales Order and Sales Order Invoice line entry, an Order Weight pop up will appear when you select an Inventory line . It will display the item's weight from the Inventory Masterfile converted to the UOM on the line as well as the extension for the line and an order total.

Order Weight & Cubic Volume					
Item Weight	35.67	Extended Weight	71.340	Total Weight	229.02
Cubic Volume:	10				

If an Inventory Category Code was specified in Setup, the window will include the Item's specified category value from the Inventory Masterfile converted to the UOM on the line as well as the extension for the line and an order total.

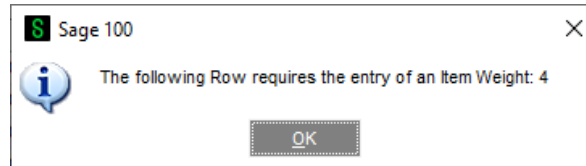
Order Weight & Cubic Volume					
Item Weight	35.67	Extended Weight	71.340	Total Weight	229.02
Cubic Volume:	10.00	Extended Category	20.00	Total Category	20.00

An Item Weight field has been added to the Sales Order entry grid. It will default to the value in Inventory at the time the order or invoice line was added; it does not refresh as changes are made in Inventory.

The screenshot shows the 'Sales Order Entry (ABC) 8/3/2023' window. The 'Lines' tab is active, displaying a table with columns: Item Code, Ordered, Back Ordered, Unit Price, Extension, and Comment. The table contains 8 rows of data. Below the table, there is a detailed view for the selected item (1001-HON-H252) showing fields for Alias Item Desc, Vendor Number, PO Number, PO Req Date, and Item Weight (35.67). The Total Amount is 825.00.

Item Code	Ordered	Back Ordered	Unit Price	Extension	Comment
1 TEST_KIT	2.00	.00	1.000	2.00	
2 1001-HON-H252	4.00	.00	.000	.00	
3 1001-HON-H252LK	2.00	.00	.000	.00	
4 1001-HON-H252	2.00	.00	84.000	168.00	
5 1001-HON-H254	1.00	.00	131.000	131.00	
6 1001-HON-H254	1.00	.00	131.000	131.00	
7 1001-HON-H254	3.00	.00	131.000	393.00	
8	.00	.00	.000	.00	

When you exit the lines tab, or attempt to accept the Order/Invoice and one or more of the item weight fields are zero, you will be warned and returned to the Lines tab to edit the item weight entries.



If the Setup question 'Enhanced Kit Component Weight Calculation' is **checked** and you explode the kit:

- 1) The kit item's weight is calculated as the sum of all of the components
- 2) The floating window displays on the kit item line as well as on the component item lines

If the Setup question 'Enhanced Kit Component Weight Calculation' is **unchecked**, and you explode the kit:

- 1) The kit item's weight is taken from the Inventory Masterfile
- 2) The floating window displays only on the kit item; it does not display when a component line is in focus.

If you do not explode the kit, then the kit item weight comes from the Inventory Masterfile.

Regardless of how you answered 'Enhanced Kit Component Weight Calculation,' Categories do not calculate as the sum of the component items for exploded kits.

Freight Calculations

If you have answered 'Actual' to the Sales Order setup option 'Use Shipping Code to Calculate Freight', the Order Total Weight as calculated by this Extended Solution will default into the Ship Weight field.

Shipping Data Entry

Shipping Data Entry has been modified to display the floating window when on the Lines Tab and has the Weight field added to the Lines grid. Access to the weight field follows the same rules outlined above.

The screenshot shows the 'Shipping Data Entry (ABC) 8/3/2023' window. At the top, there are fields for Shipper ID (1), Ship Date (8/3/2023), Shipping No. (0100063), Customer No. (01-ABF), Order No. (0000192), Ship Status (New), and SO Created By (dsd). Below this is a '1. Lines' tab with a '2. Shipping' sub-tab. A grid displays the following data:

Item Code	Ordered	Shipped	Back Ordered	Comment
D1400	1.00	1.00	.00	
2 1001-HON-H252	2.00	2.00	.00	
3 1001-HON-H254	1.00	1.00	.00	
4 1001-HON-H254	1.00	1.00	.00	
5 1001-HON-H254	3.00	3.00	.00	

A floating window titled 'Order Weight & Cubic Volume' is open, showing the following summary:

Item Weight	113.00	Extended Weight	113.000	Total Weight	198.34
Cubic Volume:	3840.00	Extended Category	3,840.00	Total Category	3860.00

At the bottom of the window, there are buttons for 'Quick Print...', 'Auto Increment' (checked), 'Accept', 'Cancel', 'Delete', and a help icon.

Helpful Hints

- Total Weight and Total Item Category will not be recalculated on orders and invoices created before this Extended Solution was installed and enabled. If you add new lines/remove existing lines from these orders/invoices after this Extended Solution is enabled, the orders' Total Weight will be incorrect.

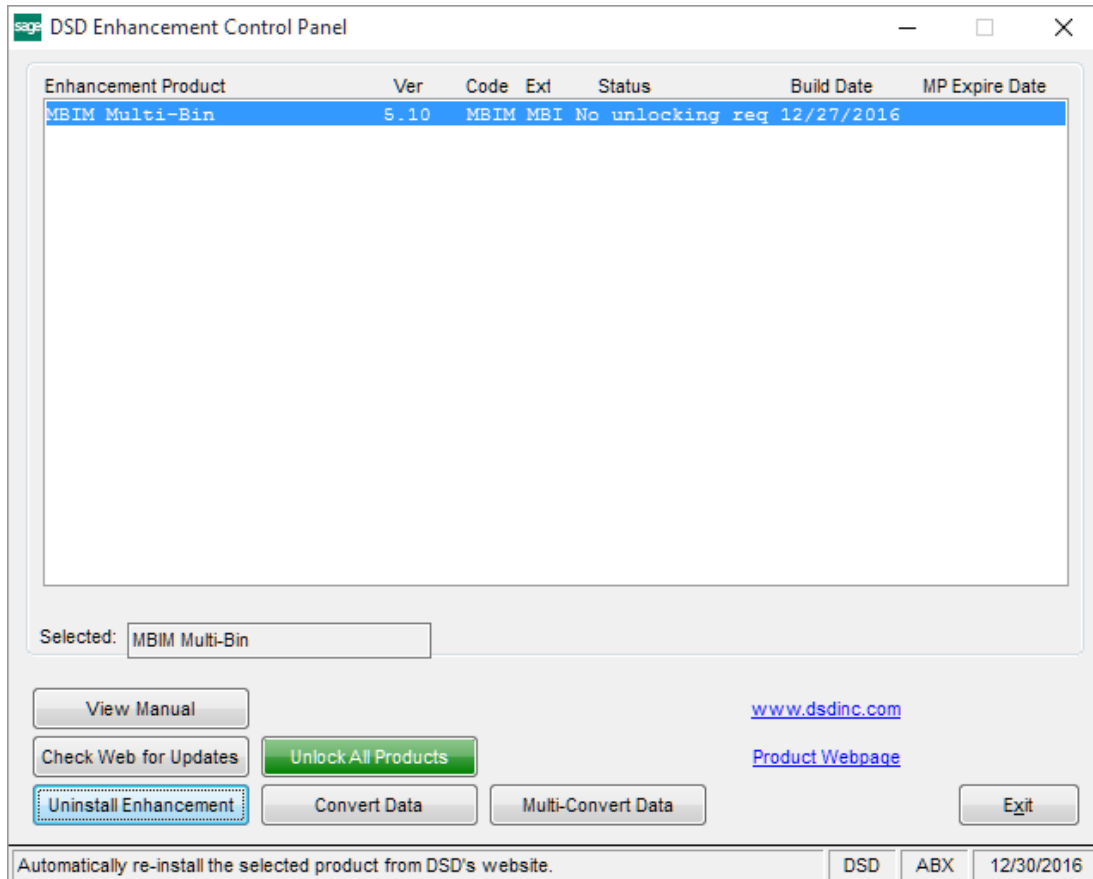
ODBC Dictionary

The files listed below have been added, or changed, in the ODBC Dictionaries by this Extended Solution

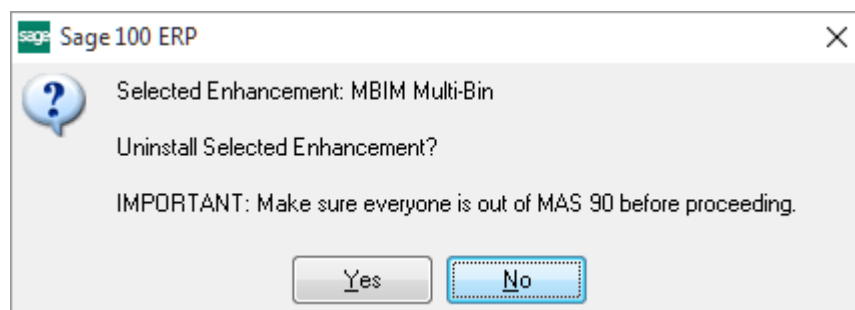
<i>File:</i>	<i>Field:</i>
SO.SalesOrderDetail	ItemWeight_001
SO.InvoiceDetail	ItemWeight_001

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.

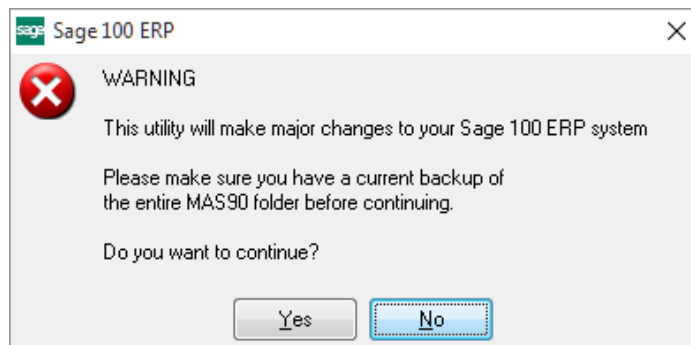


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



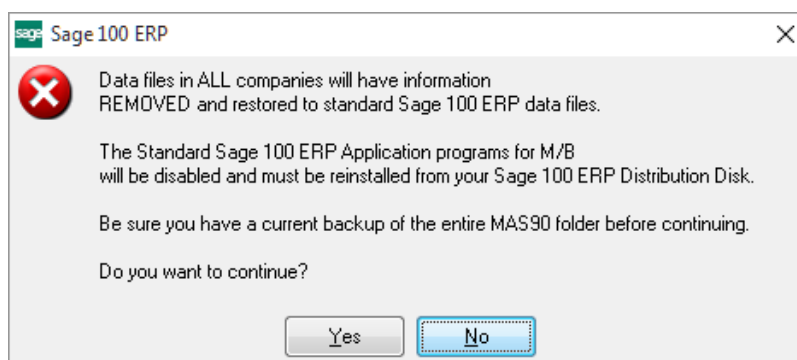
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

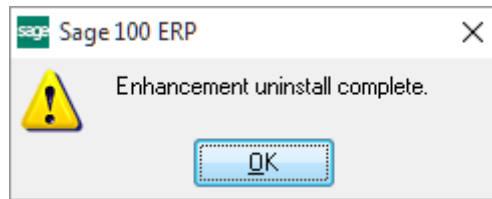
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).

