



DSD Business Systems

Sage 100 Enhancements

S095

Sliding Scale Commissions by Items
SO-1095

Version 7.40



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Sliding Scale Commissions by Items User's Manual
Version 7.40

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Table of Contents

SECTION A: INTRODUCTION	4
WEB RESOURCES.....	4
SUPPORT	4
SLIDING SCALE COMMISSIONS BY ITEMS FEATURES.....	5
SECTION B: GETTING STARTED	6
REQUIRED LEVELS.....	6
INSTALLATION	6
DSD ENHANCEMENT CONTROL PANEL	8
SECTION C: SETUP	10
SECTION D: SYSTEM OPERATIONS	12
A/R SALESPERSON MAINTENANCE	12
NEGATIVE TIER RECORDS	13
INVENTORY MAINTENANCE	14
ITEM GROSS PROFIT PERCENT COMMISSION METHOD	15
ITEM UNIT PRICE COMMISSION METHOD	16
SALES JOURNAL PRINT & UPDATE.....	17
ODBC DICTIONARY.....	17
SECTION E: UNINSTALL DSD ENHANCEMENTS	18

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.dsdingc.com>

The Enhancement page contains:

Current Release Schedule
Purchasing Information
Installation Instructions
Product Support
Enhancement Links

S095 Sliding Scale Commissions by Items:

<http://www.dsdingc.com/enhancement/sliding-scale-commissions-by-items-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.

Sliding Scale Commissions by Items Features

This DSD Extended Solution allows commissions generated from Sales Order invoices to be calculated on a sliding scale based on either the gross profit percentage or the unit price of the individual Inventory line items. Additionally, you may calculate an Inventory item's commission by applying the commission rate arrived at by this Extended Solution to the line extension rather than using the Inventory item's standard commission method.

The 'Calculate Commissions By Inventory Item' box in Inventory Options Setup must be checked.

This Extended Solution affects only the commission for Inventory lines.

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
S/O	Y	7.40
I/M	Y	7.40
A/R	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.

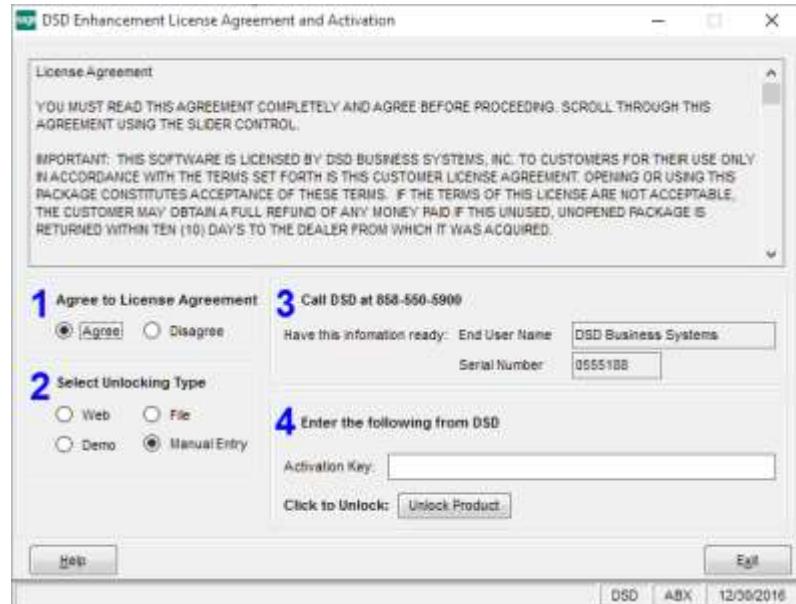
File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

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.

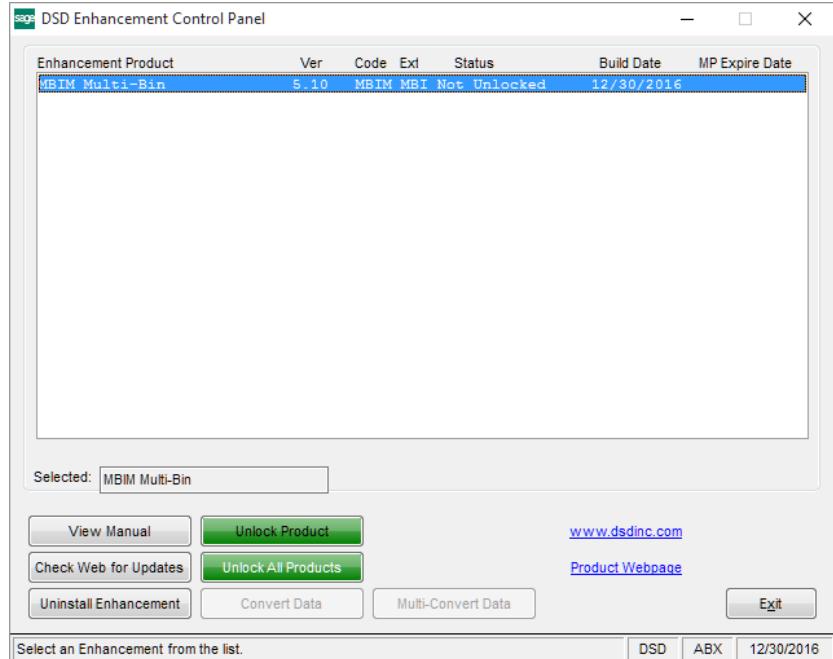
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct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

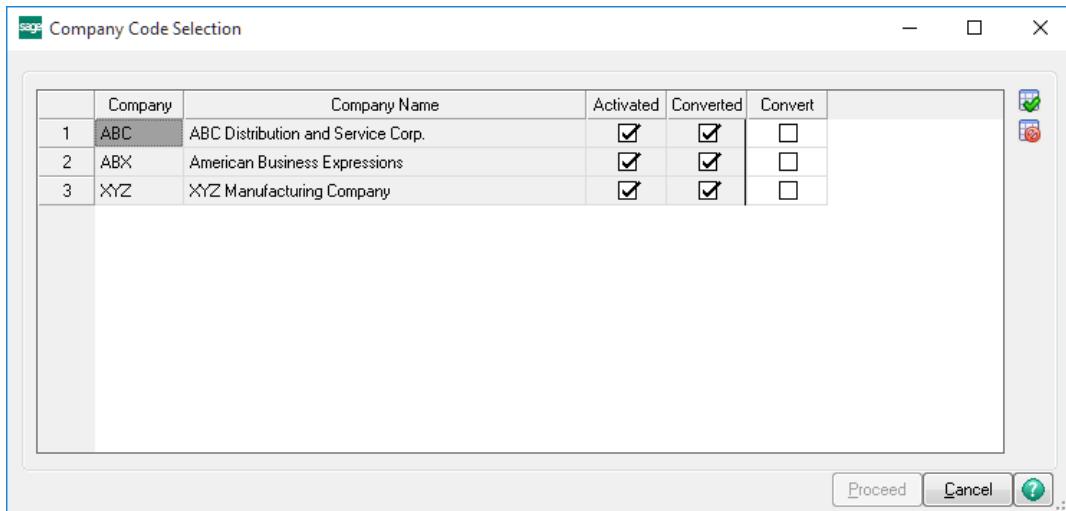
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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.)



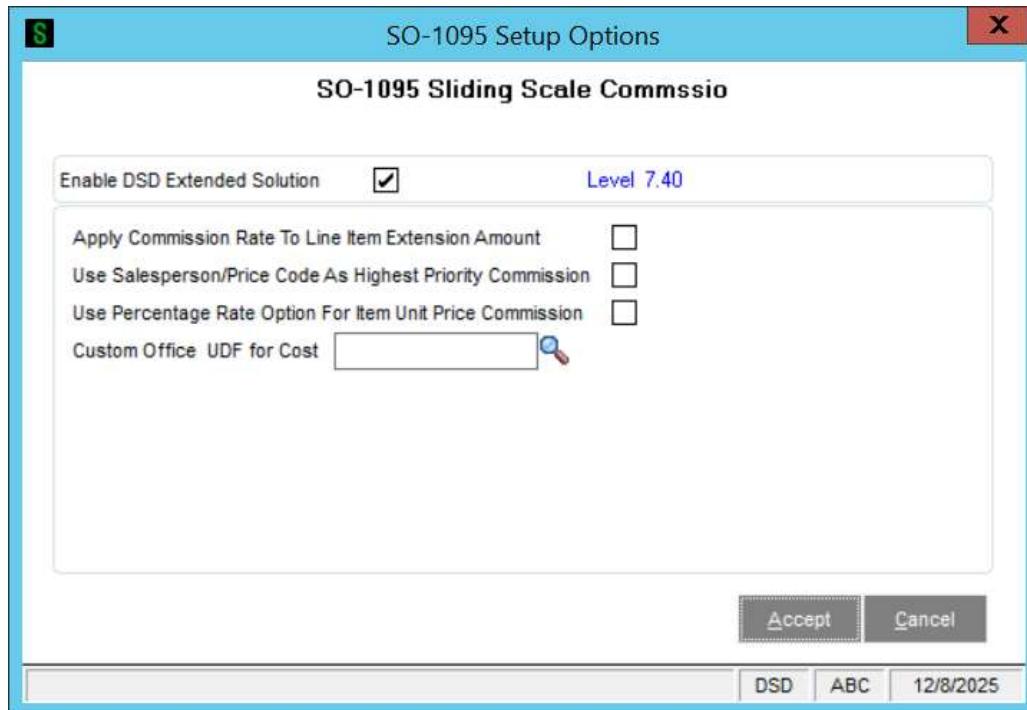
Help: The Help button, located at the bottom right of the window, opens an HTML help file.

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 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:

Apply Commission Rate To Line Item Extension Amount: Check this box to calculate the Commission Rate using the line's extension rather than the line's gross profit. The processing will be the same as if you had set the commission method to 'Std Price Percentage' for all Inventory items on the invoice.

Use Salesperson/price Code As Highest Priority Commission: Checking this box will cause the Salesperson/Price Code to be used as the Highest Priority commission. This will change the Commission selection hierarchy to

1. Salesperson/Price Code
2. Item/Customer Specific Gross Profit Commission Table
3. Item Specific Gross Profit Commission Table
4. Salesperson (not Price Code specific)

If unchecked the Commission selection hierarchy is

1. Item/Customer Gross Profit Commission Table
2. Item/Customer Unit Price Commission Table
3. Item/Price Level Gross Profit Commission Table (blank customer)
4. Item/Price Level Unit Price Commission Table (blank Customer)

5. Item Gross Profit Commission Table (blank customer and blank price level)
6. Item Unit Price Commission Table (blank customer and blank price level)
7. Salesperson/Price Code
8. Salesperson (not Price Code specific)

Use Percentage Rate Option For Item Unit Price Commission: Check this box if you wish to use a percentage amount for the Item Unit Price option. When changing this option, the system checks for any existing records. If any are found, a prompt will appear asking you if you want to delete any existing records with the old format. If you answer 'NO,' the option will not be changed from its current setting. If you answer 'YES,' then the old records are deleted and the option flag is changed. If you are using the sliding scale by item option, all items must have either a flat rate or percentage rate commission. You will not be able to have some items that are percentage rate and some that are flat rate.

If you have the Custom Office module enabled you will have access to the following prompt:

Custom Office UDF for Cost: If you wish to use a line UDF to hold the unit cost value used in the commission calculation, then specify one S/O Invoice Detail, numeric UDF.

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

Role Maintenance

The following Tasks have been added to Sales Order, Setup Options:

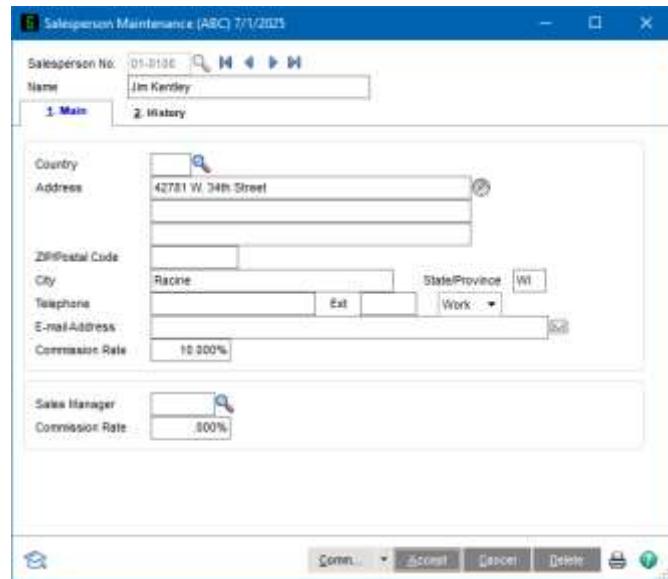
- Extended Solutions Setup

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

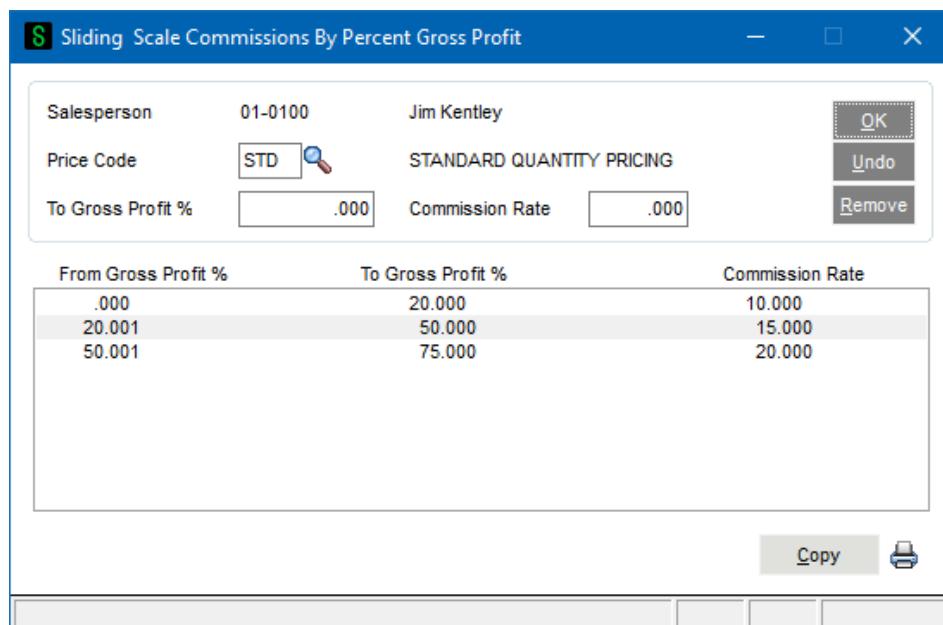
Section D: System Operations

A/R Salesperson Maintenance

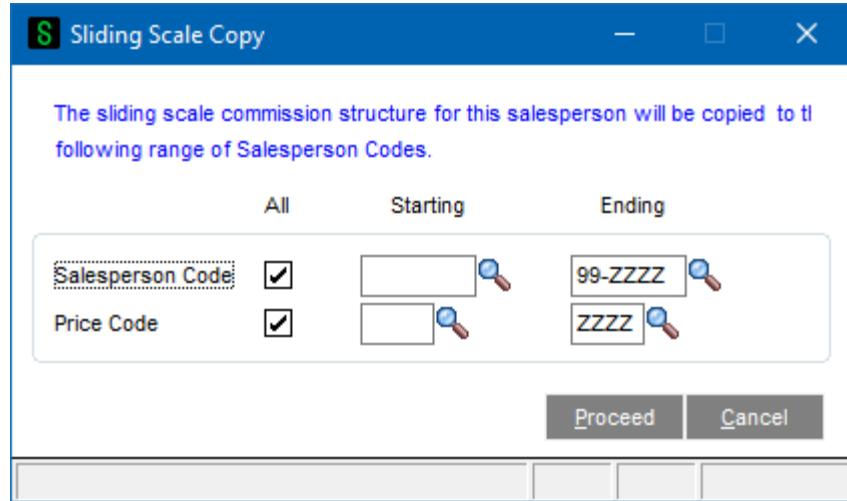
A 'Comm...' button has been added to the A/R Salesperson Maintenance screen. Click this button to enter and maintain a sliding scale commission rate table for any number of tiers between 0% and 99999.999% Gross Profit.



For each Salesperson/Price Code combination, a break level may be entered with a corresponding commission rate. The entry of a Price Code is not required. If no Price Code is entered, the table will be associated with the Salesperson only, not Salesperson/Price Code combination. An option to print a Sliding Scale Commission by Gross Profit Listing by Salesperson has been included.



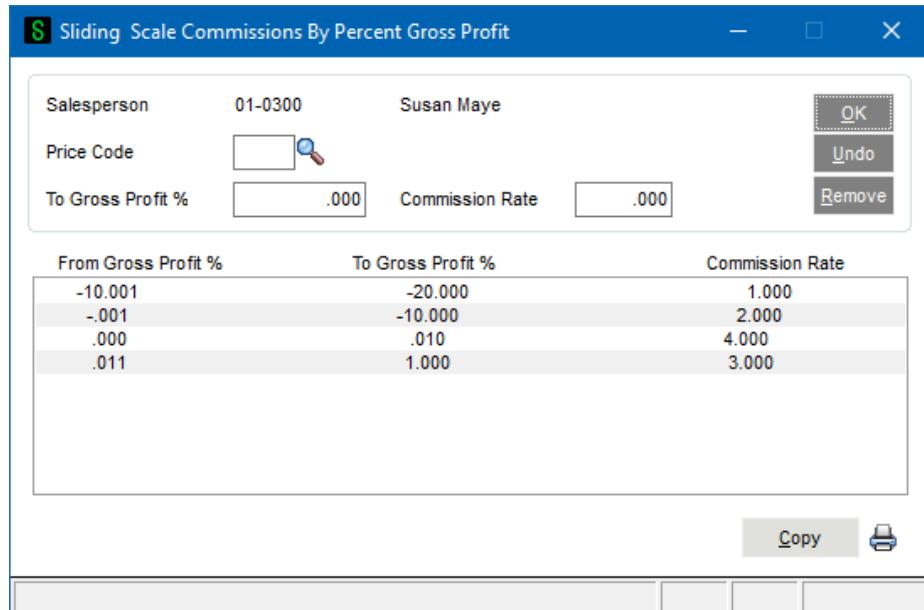
An additional option allows the commission table for a Salesperson to be copied to a range of Salesperson codes.



Negative Tier Records

Negative tier records are stored in the file as their inverse amount. This is done in order to maintain their correct sort position in the file. The inverse formula is $\text{TIER} = -9999.999 - \text{TIER}$.

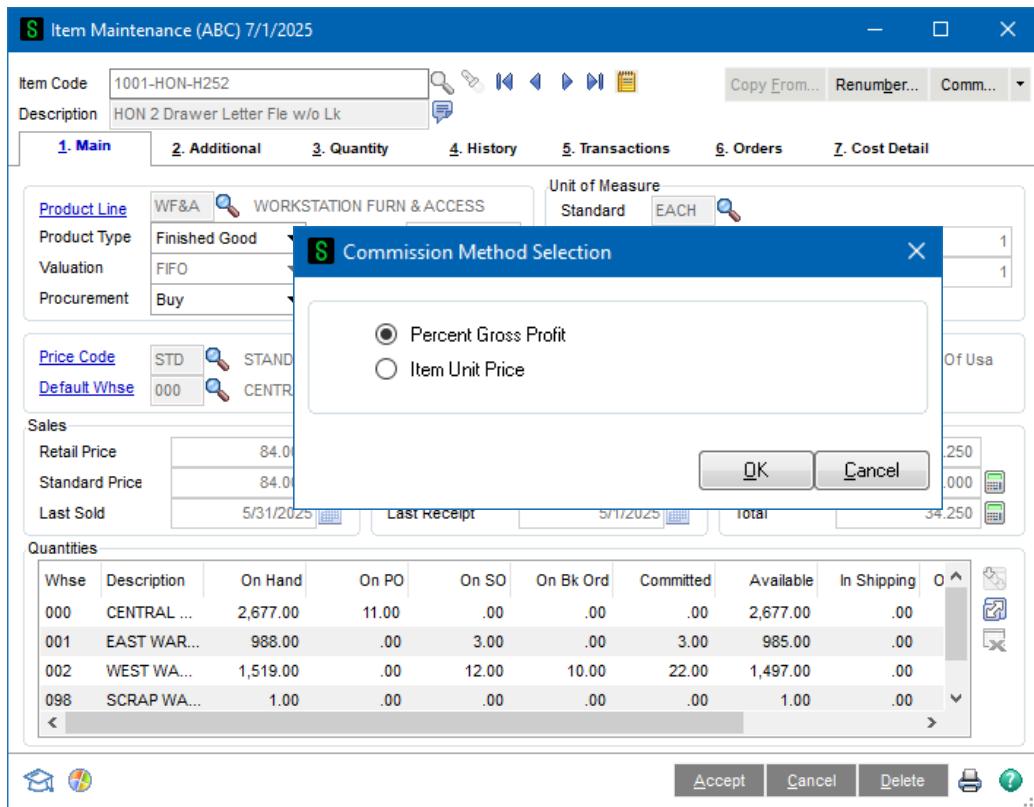
See below for an example for negative tier records in Sliding Scale Commission by Percent Gross Profit.



SLIDING SCALE COMMISSION LISTING			ABC Distribution and Service Corp.
PRICE CODE	FROM % GROSS PROFIT	TO % GROSS PROFIT	COMMISSION RATE
	-10.001	-20.000	1.000
	-.001	-10.000	2.000
	.000	.010	4.000
	.011	1.000	3.000

Inventory Maintenance

A 'Comm' selection has been added to the 'More...' drop-down button in Inventory Maintenance to access the Commission panel. Click the 'Comm' option to access the Commission Method Selection window. (The Standard commission method for an item cannot be 'None' or 'Std Commission').



Select an option to enter and maintain a sliding scale commission rate table for any number of tiers, either by Item's Unit Price or by Item's Percent Gross Profit.

Item Gross Profit Percent Commission Method

For each Inventory item, a Customer Number or Price Level can be defined or left blank, and a Gross Profit percentage break level may be entered with a corresponding commission rate. Click on the lookup located next to the Item Description to list entries for this Item by Customer Number. The Inventory Item Specific Table is not variable by Salesperson.

Sliding Scale Commissions

Item Number	1001-HON-H252	HON 2 Drawer Letter File w/o Lk	OK			
Customer Number	<input type="text"/>		Undo			
Price Level	<input type="text"/>		Remove			
To Gross Profit %	<input type="text"/> .000					
Commission Rate	<input type="text"/> .000					
From Gross Profit %	To Gross Profit %	Commission Rate				
<table border="1"> <tr> <td></td> <td></td> <td></td> </tr> </table>						
Copy 						

A/R Sliding Scale Commissions

Item Number	Customer	Price Level
1001-HON-H252	01-ABF	
1001-HON-H252	01-ABS	
1001-HON-H252	01-AVNET	

Search Customer Begins with Find

Filters...

Custom... Lookup Wizard... Select Cancel

Found 3 records

Item Unit Price Commission Method

Either a Customer Number or a Price Level can be defined when using the Item Unit Price Commission Method. In addition, a To Unit Price break level may be entered with a corresponding commission rate. Click on the lookup button located next to the Item Description to list entries for this Item by Customer Number.

If the Setup prompt ‘Use Percentage Rate Option for Item Unit Price Commission’ is unchecked, a break level may be entered with a corresponding flat commission amount. If checked, a break level may be entered with a corresponding commission percentage rate.

These tables do not vary by Salesperson.

You can copy records by clicking on the ‘COPY’ button. You will be prompted for a range of Inventory items and a range of Customer Numbers. Clicking ‘PROCEED’ will create or overwrite existing records for the Items and or Customers defined. (‘All’ is not an operand for Customer Number.)

The copy button will be disabled whenever there is a Price Level on the screen.

Selections		
Select Field	Operand	Value
Item Code	All	
Customer Number	Not Equal to	

An option to print a Sliding Scale Commission Listing has been included. Below is an example of what is produced when you use Commission by Gross Profit.

SLIDING SCALE COMMISSION LISTING		ABC Distribution and Service Corp.	
		COMMISSIONS BY GROSS PROFIT %	
		1001-HON-H252 - HON 2 DRAWER LETTER FILE W/NO LK	
FROM % GROSS PROFIT		TO % GROSS PROFIT	
COMMISSION RATE			
CUSTOMER NO.			
000	10.00%	10.00%	1.000
10.001	20.00%	20.00%	2.000
20.001	100.00%	100.00%	3.000
CUSTOMER NO. 01-ABF			
100.001	10.00%	10.00%	1.000
10.001	20.00%	20.00%	2.000
20.001	100.00%	100.00%	3.000
CUSTOMER NO. 01-AVKET			
100.001	10.00%	10.00%	1.000
10.001	20.00%	20.00%	2.000
20.001	100.00%	100.00%	3.000

Sales Journal Print & Update

The method by which commissions are calculated in the Sales Order Journal Pre-Update has been enhanced to use these commission tables. The Sales Order Gross Profit Journal and Salesperson Commission Report will reflect the accurate commission amount calculated, based on the item's gross profit percentage and corresponding commission rate. If negative tiers are specified, then negative commission amounts will result. When no commission rate tier is found for the Inventory Item or the Salesperson, normal Sage 100 commission calculation will take over.

If you entered a UDF in Setup for 'Custom Office UDF for Cost,' SO-1095 will use the value in this field as the Inventory Item's Unit Cost for Commission Calculations. Zero will be considered a valid value. All other Sales Journal updates which reference 'cost' will be unaffected.

ODBC Dictionary

The files listed below have been added or changed in the ODBC Dictionaries by this Extended Solution for Crystal Reports purposes.

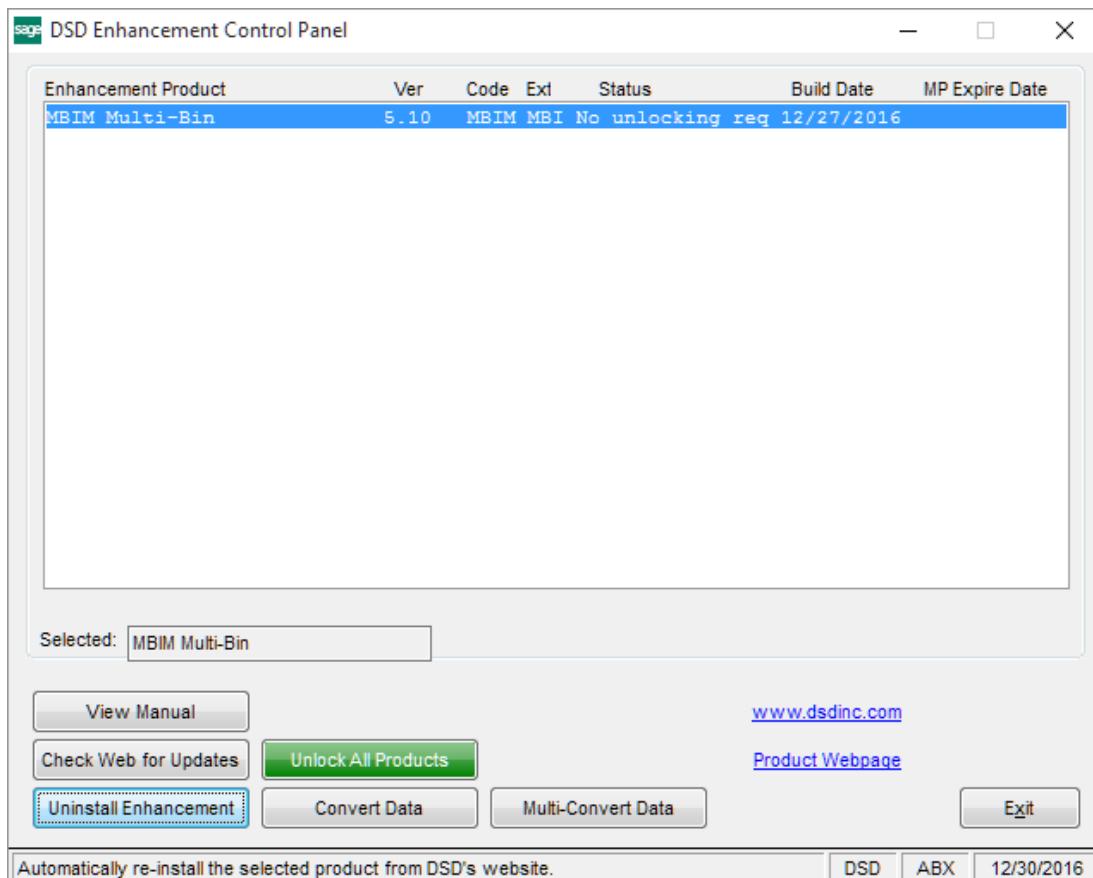
File:
AR_SlidingScaleCommissions_001

Field:
All Fields

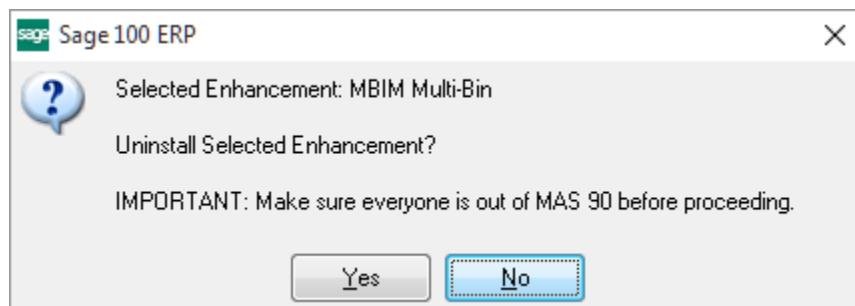
Be aware that the ODBC Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

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.



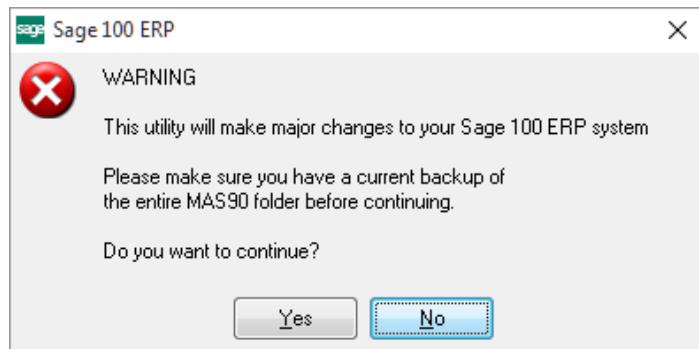
When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.

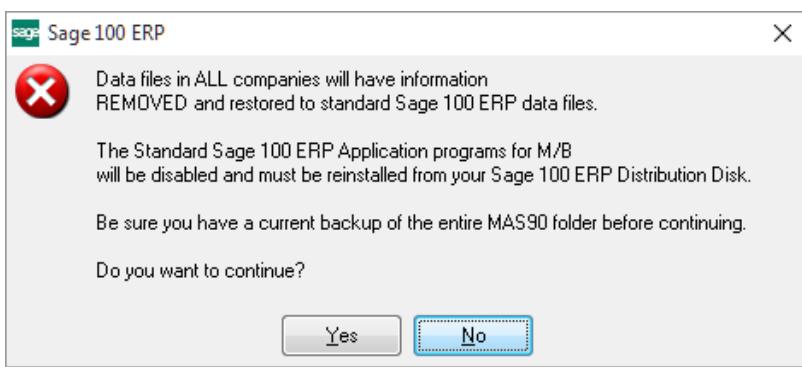
After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

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.

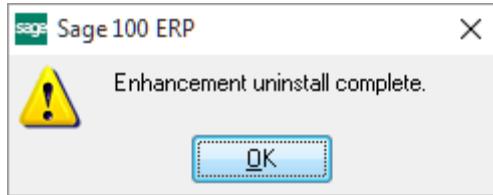
The following message box will appear, displaying the final warning message.



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).