



# **DSD Business Systems**

**Sage 100 Enhancements**

**S328**

**Hold Flags for Sales Order**

**SO-1328**

**Version 7.20**



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Hold Flags for Sales Order User's Manual  
Version 7.20

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## Section A: Introduction

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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*

S328 Hold Flags for Sales Order:

<http://www.dsdinc.com/enh/pages/S328.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 with Symantec PCAnywhere or by some other means access or duplicate the system.

### ***Hold Flags for Sales Order Features***

This DSD Extended Solution to the Sales Order module allows you to place orders on specific types of 'hold': Terms Hold, Credit Hold and Margin Hold.

- The Custom Office module must be activated.
- Additional functionality exists if Extended Solution AR-1054, *Automatic Credit Hold Utility* is installed.

## 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 License Agreement and Activation**

**License Agreement**

YOU MUST READ THIS AGREEMENT COMPLETELY AND AGREE BEFORE PROCEEDING. SCROLL THROUGH THIS AGREEMENT USING THE SLIDER CONTROL.

IMPORTANT: THIS SOFTWARE IS LICENSED BY DSD BUSINESS SYSTEMS, INC. TO CUSTOMERS FOR THEIR USE ONLY IN ACCORDANCE WITH THE TERMS SET FORTH IN THIS CUSTOMER LICENSE AGREEMENT. OPENING OR USING THIS PACKAGE CONSTITUTES ACCEPTANCE OF THESE TERMS. IF THE TERMS OF THIS LICENSE ARE NOT ACCEPTABLE, THE CUSTOMER MAY OBTAIN A FULL REFUND OF ANY MONEY PAID IF THIS UNUSED, UNOPENED PACKAGE IS RETURNED WITHIN TEN (10) DAYS TO THE DEALER FROM WHICH IT WAS ACQUIRED.

**1 Agree to License Agreement**  
☒ Agree ☐ Disagree

**2 Select Unlocking Type**  
☐ Web ☐ File  
☐ Demo ☒ Manual Entry

**3 Call DSD at 858-550-5900**  
 Have this information ready: End User Name   
 Serial Number

**4 Enter the following from DSD**  
 Activation Key:   
 Click to Unlock:

DSD ABX 12/30/2016

**sage DSD Conversion Wizard: Step One, Introduction**

**DSD BUSINESS SYSTEMS**

This company's data needs to be converted.  
 This program will perform the conversion.

### 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

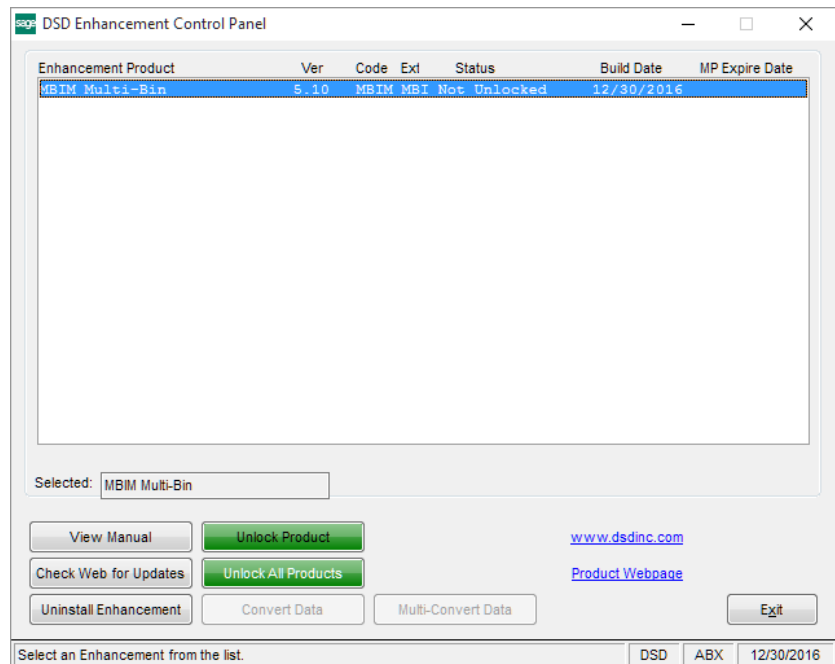
present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

**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.*

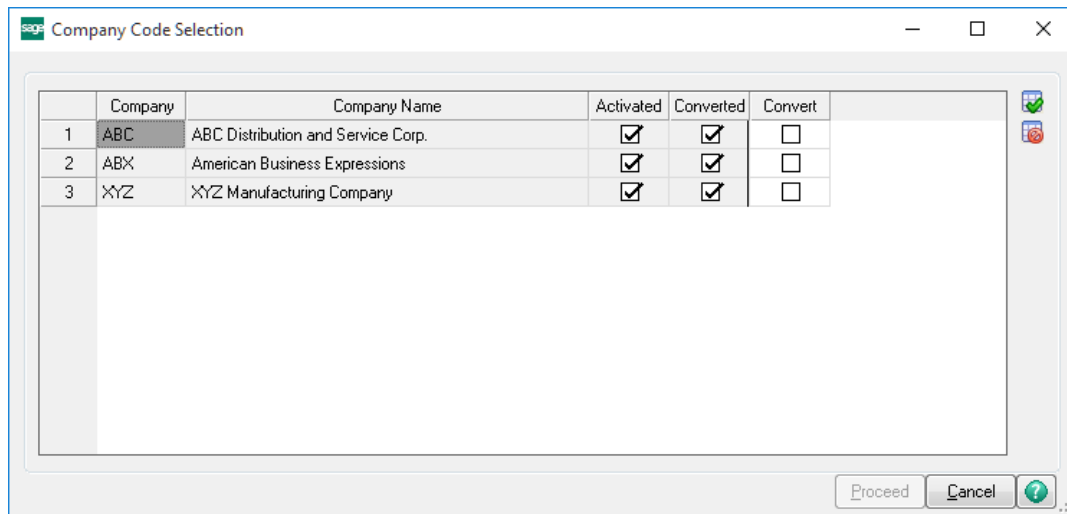
**Unlock All Products:** This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*

**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 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 Extended Solution' box to activate this Extended Solution.

**SO-1328 Setup Options**

**SO-1328 Hold Flags for Sales O**

Enable DSD Extended Solution ☒ Level 7.20

S/O Sales Order Header UDF for Terms Hold Flag	TERMS_HOLD	Terms Hold
S/O Sales Order Header UDF for Terms Hold Override Flag	TERMS_HOLD_OVR	Terms Hold Override
S/O Sales Order Header UDF for Credit Hold Flag	CREDIT_HOLD	Credit Hold
S/O Sales Order Header UDF for Credit Hold Override Flag	CREDIT_HOLD_OVR	Credit Hold Override
S/O Sales Order Header UDF for Margin Hold Flag	MARGIN_HOLD	Margin Hold
S/O Sales Order Header UDF for Margin Hold Override Flag	MARGIN_HOLD_OVR	Margin Hold Override
S/O Sales Order Header UDF for Gross Margin Amount	GROSS_MARGIN_AMT	Gross Margin Amount
S/O Sales Order Header UDF for Gross Margin Percent	GROSS_MARGIN_PCT	Gross Margin Percent
Gross Margin Percent for Margin Hold Flag	5.000%	
Select 'Print SO' When Orders Are Taken Off Hold	<input type="checkbox"/>	

Accept Cancel

DSD ABC 11/7/2023

Answer the following prompts:

**S/O SALES ORDER HEADER UDF FOR TERMS HOLD FLAG:** Specify the checkbox type S/O Sales Order Header UDF for the Terms Hold Flag.

**S/O SALES ORDER HEADER UDF FOR TERMS HOLD OVERRIDE FLAG:** Specify the checkbox type S/O Sales Order Header UDF for the Terms Hold Override Flag.

**S/O SALES ORDER HEADER UDF FOR CREDIT HOLD FLAG:** Specify the checkbox type S/O Sales Order Header UDF for the Credit Hold Flag.

**S/O SALES ORDER HEADER UDF FOR CREDIT HOLD OVERRIDE FLAG:** Specify the checkbox type S/O Sales Order Header UDF for the Credit Hold Override Flag.

**S/O SALES ORDER HEADER UDF FOR MARGIN HOLD FLAG:** Specify the checkbox type S/O Sales Order Header UDF for the Margin Hold Flag.

**S/O SALES ORDER HEADER UDF FOR MARGIN HOLD OVERRIDE FLAG:** Specify the checkbox type S/O Sales Order Header UDF for the Margin Hold Override Flag.

- All of the checkbox type UDFs specified should have a default value of 'N' defined in UDF setup.

**S/O SALES ORDER HEADER UDF FOR GROSS MARGIN AMOUNT:** Specify the numeric type S/O Sales Order Header UDF for the Gross Margin Amount.

**S/O SALES ORDER HEADER UDF FOR GROSS MARGIN PERCENT:** Specify the numeric S/O Sales Order Header UDF for the Gross Margin Percent.

**GROSS MARGIN PERCENT FOR MARGIN HOLD FLAG:** Specify the minimum required Gross Margin percent. Anything entered that is lower than the minimum set here will cause the Margin Hold Flag to be checked.

**SELECT 'PRINT SO' WHEN ORDERS ARE TAKEN OFF HOLD:** Check this box to set the Sales order print flag to be checked when all holds have been removed.

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:

- ☐ Extended Solutions Setup

## Section D: System Operations

### Custom Office UDFs

It is recommended that you use Customizer to add the Hold flag UDFs and or Override UDFs to the S/O Entry form but set them to disabled for all users except those who have permission to change them. If you would like to password protect changes to the UDFs, CM-1001, *Enhanced Custom Office User Defined Fields* adds that feature.

### Sales Order Entry

- If the Terms Code on the order is changed, the Terms Hold UDF is checked.
- If the Customer Credit History window appears, the Credit Hold UDF is checked. Clicking the CREDIT button will not cause the UDF to be checked.
- If the Gross Margin Percent UDF is less than the setup specified Gross Margin Percent for Margin Hold, the Margin Hold UDF is checked (see details on *Margin* below).

The Gross Margin Amount UDF will hold the sum of every line's Gross Margin. All line items are included in the calculation, inventory and non-inventory alike. Non-inventory item lines use the cost referenced on the line. Inventory lines use a calculated cost depending on valuation method. Standard and Average will use the standard MAS90 hierarchy of Cost determination. LIFO, FIFO, Lot and Serial will use Last Cost, unless zero, then will use Std. Cost, unless zero, then will use Avg. Cost.

- Gross Margin Amount is calculated as the (Taxable Amount + Non Taxable Amount) – Cost of Goods Sold as determined above.
- Gross Margin Percent is calculated as Gross Margin Amount divided by the sum of the line's extended amount multiplied by 100, rounded to two decimal places, expressed as a percentage.

If any of the hold flag UDFs are changed manually, then the corresponding override flag is checked and the program will no longer check or uncheck the hold flag for that hold condition.

### Printing

Sales Order Printing and Sales Order Picking Sheet Printing will not print orders that have one or more of the hold flags checked. No message will be given; these orders will not be included in the print batch. The quick print function will not operate for these orders.

If you have checked the Setup option: 'Select Print SO when orders are taken off hold', the standard "Print SO" flag on the sales order header will be set to checked when all of the hold flags on the order are cleared. The status of all hold flags will be checked under the following conditions:

- The user manually clears one of the hold flags
- The margin flag is unchecked due to the processing described above
- Extended Solution AR-1054 clears the credit hold and/or terms hold flags

### ***Sales Order Invoice Entry***

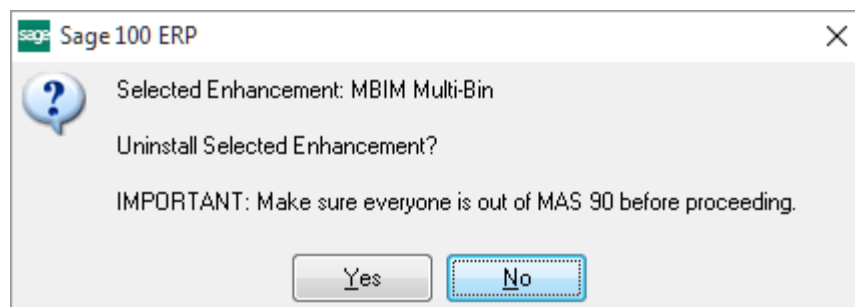
Sales Order Invoice Entry will not allow orders with one or more of the hold flags checked to be invoiced. An on-screen message will appear stating that the order is on hold and invoicing is not allowed.

## 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.

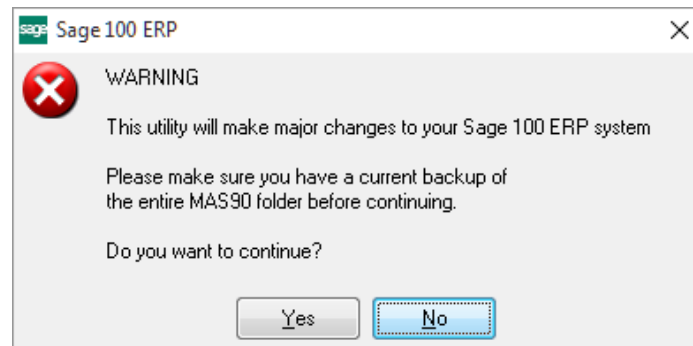


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



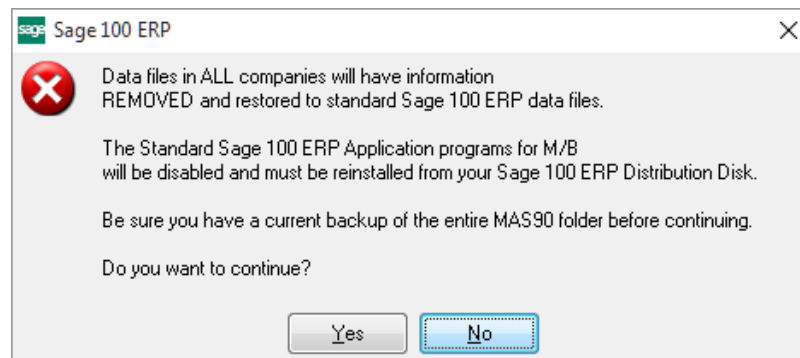
Select **No** to exit the Uninstall Process.  
Select **Yes** to continue with the Uninstall Process.

**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.

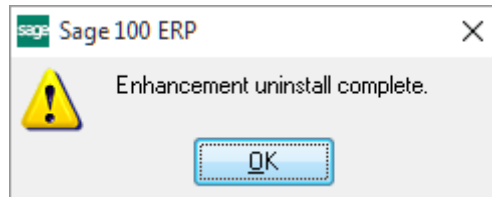
Select **No** to exit the Uninstall Process.  
Select **Yes** to continue with the Uninstall Process.

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).