

# **DSD Business Systems**

Sage 100 Enhancements

**S333**

**Line Item Discount Validation by Product Line**

**SO-1333**

**Version 6.20**



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Line Item Discount Validation by Product Line User's Manual  
Version 6.20

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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*

S333 Line Item Discount Validation by Product Line :

<http://www.dsdinc.com/enh/pages/S333.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.

### ***Line Item Discount Validation by Product Line Features***

This Extended Solution adds the ability to default and validate an inventory line discount percent by Product Line in Sales Order and Invoice entry. A new button has been added to 'refresh' discounts for all lines with matching product lines.

## 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
A/P	Y	6.20

### 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.*

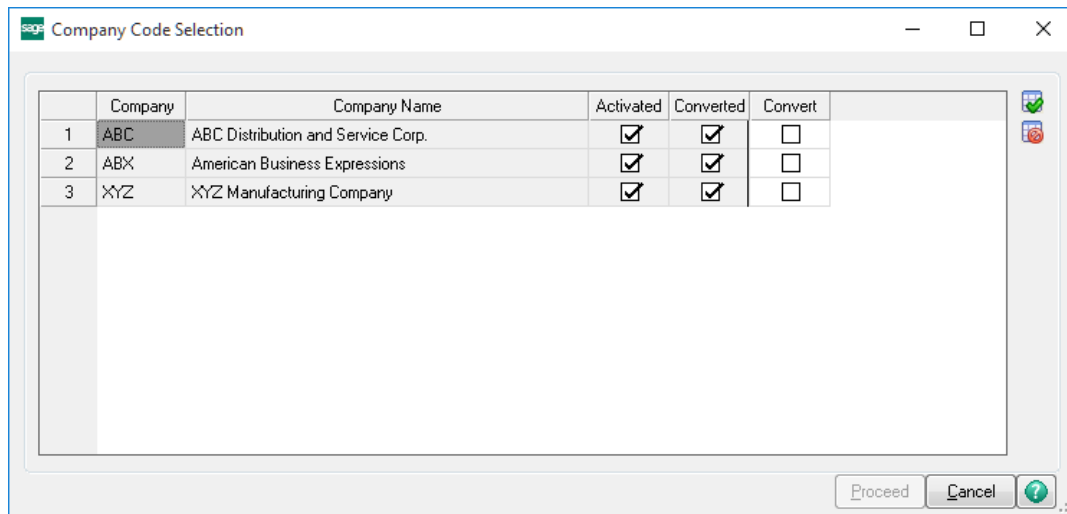
**Unlock Product:** This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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

**SO-1333 Setup Options**

**Line Item Disc Validate Prod L**

Enable DSD Extended Solution ☒ Level 6.20

Use Customer Discount as Initial Product Line Default ☐

Default First Line Item Discount Rate ☒

Accept Cancel

DSD ABC 11/16/2020

Answer the following prompts:

**USE CUSTOMER DISCOUNT AS INITIAL PRODUCT LINE DEFAULT:** Check this box to attempt a match on the Customer's Discount Rate to a valid value in the product line file for the inventory item being entered.

**DEFAULT FIRST LINE ITEM DISCOUNT RATE:** Check this box to have the first Line Item Discount rate from the Item's Product Line Maintenance setup default into the Disc % field in Sales Order Entry or SO Invoice Entry.

You cannot have both 'Use Customer Discount as Initial Product Line Default' and 'Default First Line Item Discount Rate' checked at the same time.

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

The following Security Event has been added to Sales Order, Miscellaneous:

- Allow Override of the Discount % field

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

## Section D: System Operations

### I/M Product Line Maintenance

A 'More' button has been added to Inventory Product Line Maintenance.

Click the button to access Default Line Item Discount Entry. Specify the valid discount percentage(s) and corresponding description(s). An unlimited list of valid discounts may be maintained. Click the lookup button to see all valid options and to select from the list for edit.

### Sales Order and S/O Invoice Data Entry

The line 'Discount %' field has been enhanced with a lookup button. This button is only functional on Inventory lines and will list the valid discount percentages set up in Product Line Maintenance. If there are any valid discounts for the Product Line, only those discounts or zero can be used for items in that product line. Any value can be entered if there are no records in the validation file for the Product Line.

A user without the Role Security Event option 'Allow Override of the Discount % field' can only select from the valid discounts setup for the product line regardless of the discount % value previously entered for this item.

	Item Code	Ordered	Back Ordered	Unit Price	Extension	Disc %
1	PFS-007-CABLE	1,000.00	.00	.180	177.75	1.250
2	PFS-007-CONN-F	10.00	.00	13.000	128.38	1.250
3	PFS-007-CONN-M	15.00	.00	13.000	192.56	1.250
4	VOG-CM-MP-B	3.00	.00	42.000	124.43	1.250
5	VOG-CM-MSC	8.00	.00	266.750	2,107.33	1.250
6	WJ-M-2107-B	12.00	.00	30.960	366.88	1.250
7	WJ-M-2109-A	5.00	.00	28.400	140.23	1.250
8		.00	.00	.000	.00	0.000

Description: POST BINDER 3/16 X 1/2 (100)  
Warehouse: 001  
Unit Of Measure: BOX  
Shipped: .00  
Total Amount: 3,237.56

Upon setting the discount percentage to a non-zero value, that value will become the default value for each subsequent inventory line within this Product Line keyed onto the order or invoice until the default is changed or until you exit the Order/Invoice. If you re-access an existing Order/Invoice and key in another item, the Extended Solution uses the last recorded instance of product line usage on the order or invoice as the default. (Last recorded instance could have occurred at any line on the order; there is no correlation to row numbers in the grid.)

If the Setup Option, 'Use Customer Discount as Initial Product Line Default' is checked, the Discount Rate from the Customer Masterfile will be used as the default value for the discount rate in

Order\Invoice entry for the first occurrence of an inventory item within a product line. If the rate from the Customer Masterfile is not in the list of valid discounts for that product line you will be warned and the rate will default to zero.



If the Setup Option, 'Default First Line Item Discount Rate' is checked, then the Discount Rate from the first Line Item's Product Line Maintenance setup will default into the Disc % field in Sales Order Entry or SO Invoice Entry.

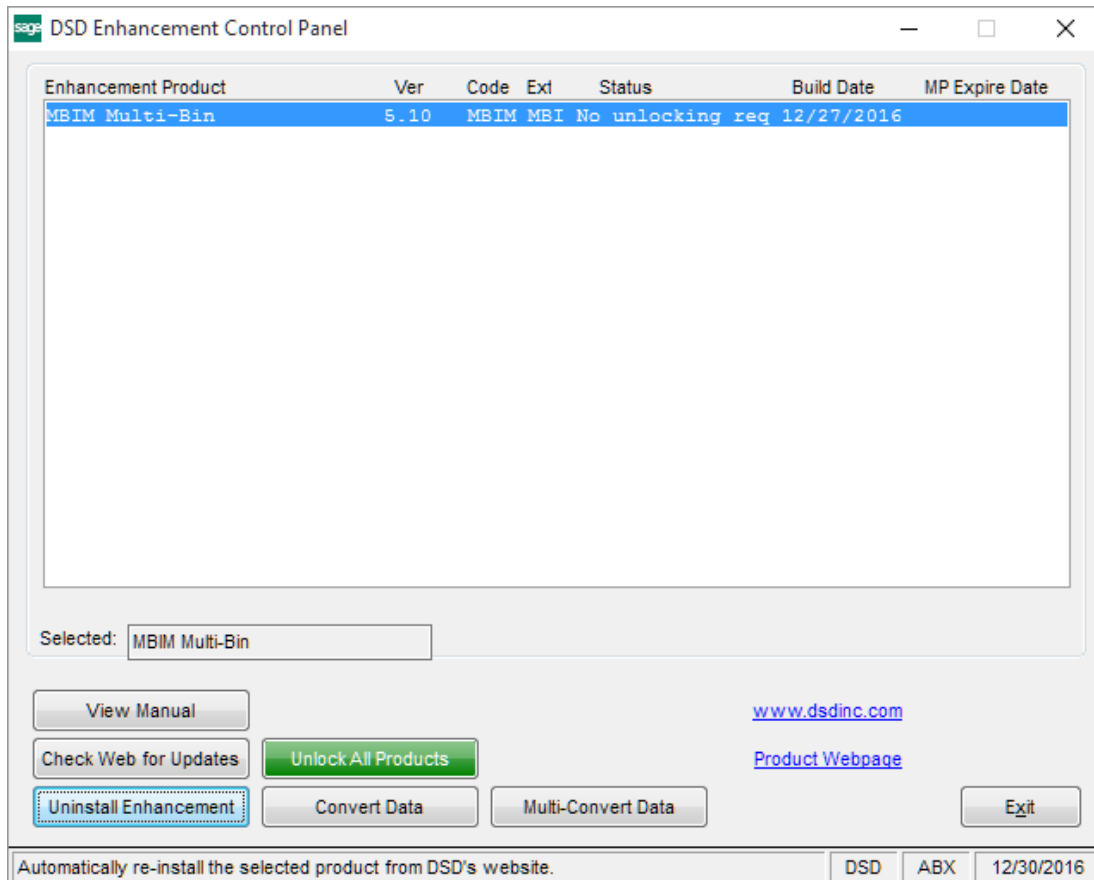
A 'Pct Rfsh' button is available above the grid on the Lines tab (Figure 5). Click this button after making a change to an inventory items' existing discount field and all other items on the order which reside on the same Product Line will be changed to reflect the same discount rate. This button will not be disabled when a non inventory line is in focus.



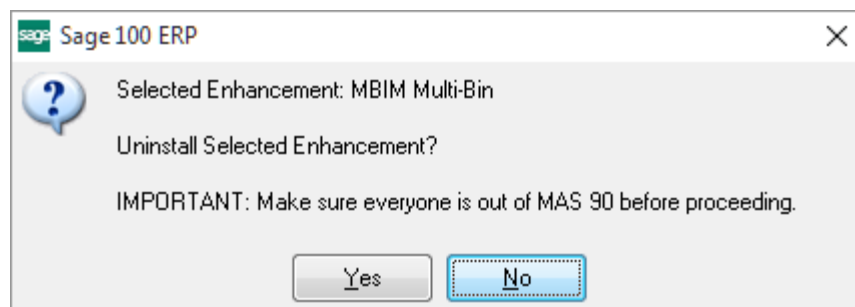
If an Invoice references a Sales Order Number, any changes made to Discounts on that Invoice will be for that Invoice only. If the Invoice is deleted, the Sales Order will not reflect any changes made to the Invoice, prior to its deletion.

## 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.



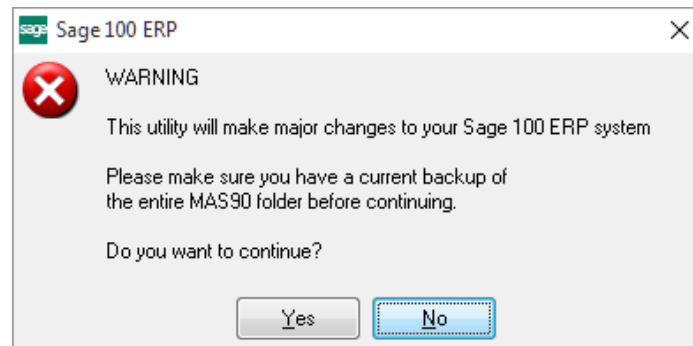
When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



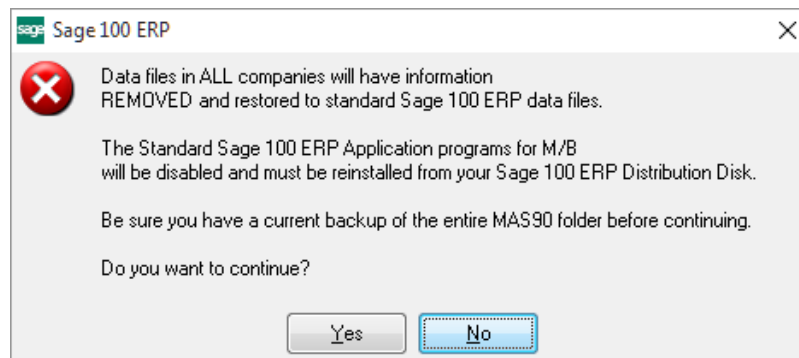
Select **No** to exit the Uninstall Process.  
Select **Yes** to continue with the Uninstall Process.

**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.

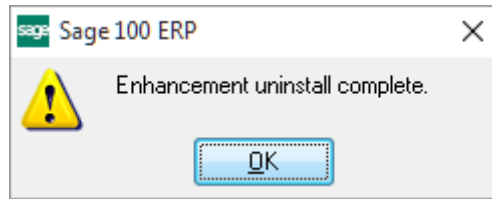
Select **No** to exit the Uninstall Process.  
Select **Yes** to continue with the Uninstall Process.

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).