

DSD Business Systems

Sage 100 Enhancements

S460

Committed Items for Sales Order

SO-1460

Version 7.20



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Committed Items for Sales Order User's Manual
Version 7.20

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DSD Business Systems
5120 Shoreham Place
Suite 280
San Diego, CA 92122
858/550-5900 8:00am to 5:00pm PST
858/550-4900 Fax

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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*

S460 Committed Items for Sales Order:

<http://www.dsdinc.com/enhancement/committed-items-for-sales-order-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.

Committed Items for Sales Order Features

This DSD Extended Solution adds the concept of consigning quantities of inventory items on a sales order for delivery now *versus* the quantities of those items that are on order for delivery later. Back Order processing has been removed from the Sales Journal Update: the 'Back Ordered Quantity' on an Order or Invoice becomes the 'Committed Quantity.' Quantities can be committed or de-committed manually or via a Commitment Utility.

Purchase Order Receipt Update has been modified with an option to print a Commitment Fill Report that details to which Sales Order lines the received quantities should be allocated, based on the sales order line's Promise Date.

The Sales Order Setup option 'Check for Available Quantity' must be unchecked in order to enable this Extended Solution.

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	7.20

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.

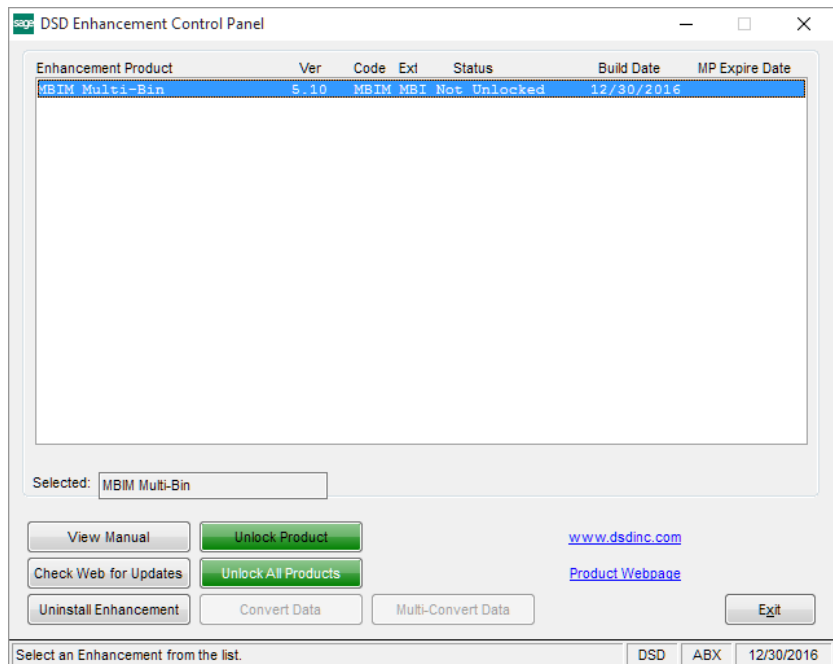
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct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

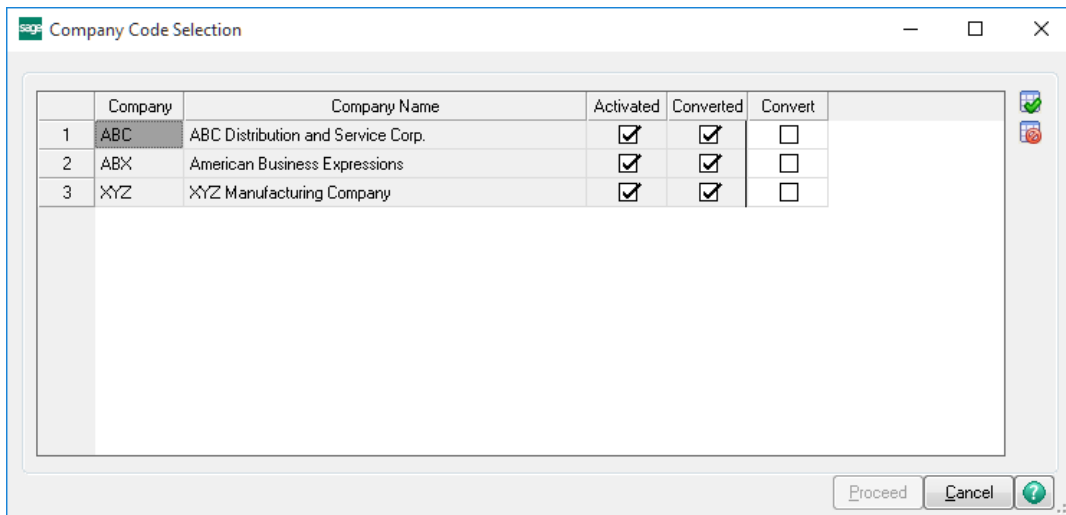
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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.)*



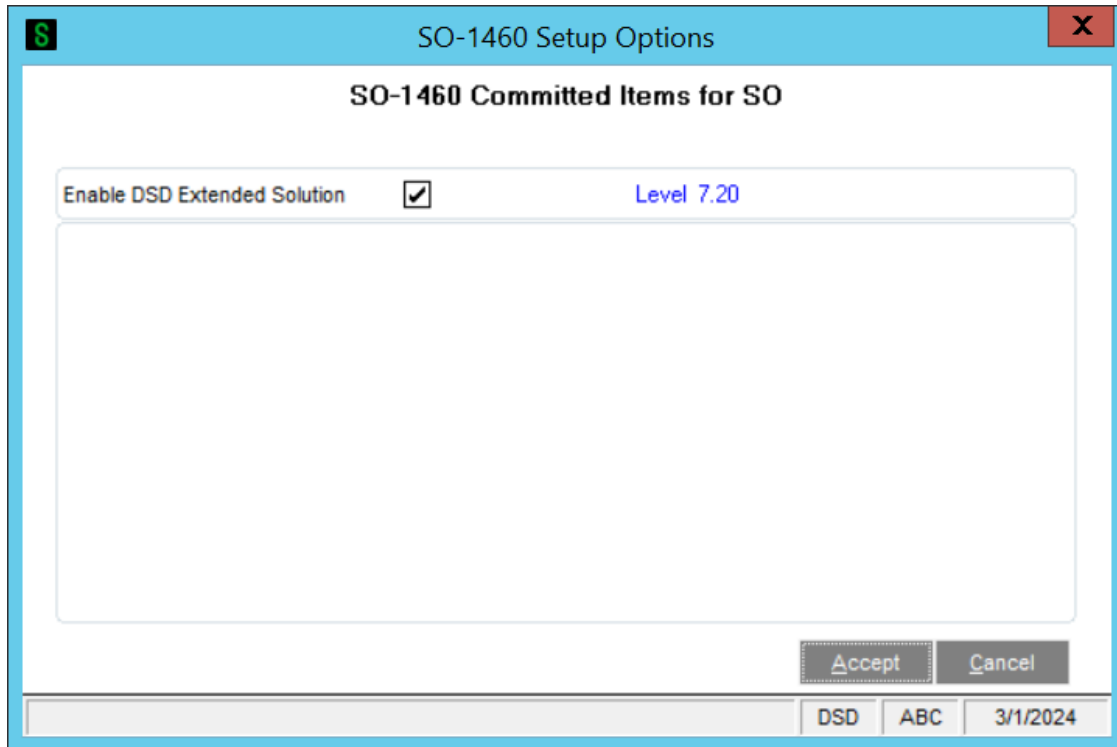
Help: The Help button, located at the bottom right of the window, opens an HTML help file.

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.



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

The following Task has been added to Sales Order, Miscellaneous Tasks:

- Commitment Utility

Users who are authorized to run any of the above should be granted permissions for the prospective tasks and security events. Please review your security setup in Role Maintenance and make appropriate changes.

Section D: System Operations

Sales Order Entry

This Extended Solution redefines the 'Quantity Back Ordered' field in Sales Order Entry, S/O Invoice Entry, Shipping Entry and Sales Order Inquiry to 'Quantity Committed'.

	Item Code	Ordered	Committed	Unit Price	Extension	Comment
1	8983	1.00	.00	39.511	39.51	
2	8984	2.00	.00	49.011	98.02	
3	GB-WF-1200-360	1.00	.00	35.490	35.49	
4		.00	.00	.000	.00	

Description: _____
Warehouse: _____
Unit Of Measure: _____
Shipped: .00
Price Level: _____

Total Amount: 173.02

Buttons: Print Order..., Print Pick..., Recalc Price, Accept, Cancel, Delete

A *committed quantity* indicates the portion of the Quantity Ordered that is required to ship sooner, and therefore is actually required to be in stock to satisfy demand for this product. The line's Promise Date refers to the date by which the Quantity Committed is needed.

For example:

On an order you have Item X

Quantity Ordered 10. Quantity Shipped is 0. Quantity Committed is 3 and the line's Promise Date is 08/15/12. You need to ship 3 of the 10 by 08/15/12.

Since the Quantity Back Ordered no longer functions as a true back order, the Order type 'Back Order' will no longer be an option.

No changes were made to the term 'Back Ordered' on any screens, reports or forms unless explicitly noted. It is expected that the user will change these headings via Customizer or Forms Maintenance.

The Quantity Ordered can never be less than the Quantity Shipped in Sales Order Entry.

No changes were made to Sales Order History.

Picking Sheet Printing

SO_PickingSheetWrk file has been modified to print the line's Quantity Committed in the QuantityOrdered field. The QuantityBackordered field is set to zero.

The report will alert you by putting an asterisk next to any quantities committed for which there is insufficient available stock.

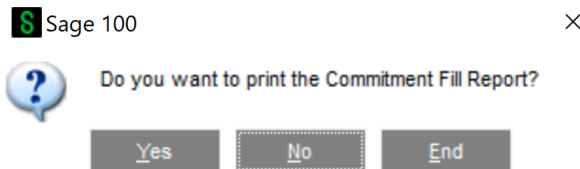
ABC Distribution and Service Corp.						
COMMITMENT UTILITY				COMMITMENT PROCESS		
S/O NUMBER	CUSTOMER NUMBER	ITEM NUMBER	WHSE CODE	QUANTITY COMMITTED	QUANTITY AVAILABLE	
PROMISE DATE: 05/01/2010						
0000112	02-CUSTOM	GLOB-V-3060-25W	001	2.00	2.00-	*
0000112	02-CUSTOM	GLOB-V-3096-25W	001	5.00	4.00	
0000112	02-CUSTOM	GLOB-V-3696-25W	001	4.00	0.00	
0000112	02-CUSTOM	PFS-007-CABLE	001	1000.00	1250.00	
0000112	02-CUSTOM	PFS-007-CONN-F	001	10.00	10.00	
0000112	02-CUSTOM	PFS-007-CONN-M	001	15.00	35.00	
0000112	02-CUSTOM	VOG-CM-CASTERS	001	10.00	9.00	
0000112	02-CUSTOM	VOG-CM-MP-B	001	3.00	54.00	
0000112	02-CUSTOM	VOG-CM-MS-C	001	8.00	61.00	
0000112	02-CUSTOM	WJ-M-2107-B	001	12.00	98.00	
0000112	02-CUSTOM	WJ-M-2109-A	001	5.00	10.00	
PROMISE DATE: 05/15/2010						
0000143	02-ALLENAP	1001-HON-H252	002	12.00	1507.00	
0000143	02-ALLENAP	1001-HON-H252LK	002	14.00	6.00-	*
0000143	02-ALLENAP	1001-HON-H254	002	25.00	16.00-	*
0000143	02-ALLENAP	1001-HON-H254LK	002	3.00	2.00-	*
0000143	02-ALLENAP	2480-8-50	002	100.00	110.00	
0000143	02-ALLENAP	2481-5-50	002	75.00	65.00	

Purchase Order Automatic Reorder Register

The Automatic Reorder Register which is printable from P/O Automatic Reorder Selection calculates the Quantity Available as Quantity on Hand minus Quantity Committed.

Purchase Order Receipts: Commitment Fill Report

After the update of P/O Receipts, instead of the Back Order Fill Report, you will be asked if you want to run the Commitment Fill Report .



The report will mirror the Back Order Fill Report with the following exceptions:

- The 'Quantity Required' field will be labeled 'Quantity Committed.'
- The Warehouse will print.
- 'Sales Order Date' will become the line's 'Promise Date.'
- There will be an additional column after 'Quantity Received' called 'Quantity Allocated.'

Commitment Fill Report		ABC Distribution and Service Corp. (ABC)						
		Warehouse: 001						
Item Code/Description	Order Number	Promise Date	Customer Number	Name	Unit of Measure	Quantity Committed	Quantity Received	Quantity Allocated
6855	PRINTER STAND W/BASKET				EACH		157.00	
	S/O: 0000162	5/31/2010	02-AMERCON	American Concrete Service		3.00		3.00
	S/O: 0000174	8/15/2012	01-ABF	American Business Futures		6.00		6.00
Total Committed:						<u>9.00</u>		

The report has a primary sort and page break by Warehouse. It then sorts by Item Number, and then, within each item, it lists the Sales Order Numbers referencing that Item, plus its Promise Date in ascending Promise Date order. The 'Quantity Allocated' column reflects how much of the 'Quantity Committed' can be filled for each Sales Order, in Promise Date order, until the total Quantity Allocated exceeds the Quantity Received. Once the Quantity Received is used up, the Quantity Allocated for the remaining sales order lines will be zero.

This is a report only; no data will be modified by the generation of this report.

Shipping Data Entry

The Quantity Committed is shown in the Back Ordered column. The Backorder and Alternate Item buttons are disabled. The Ship Remaining button will set the Quantity Shipped to the Quantity Committed. Quantity Shipped cannot exceed Qty Committed. The prompt "There are unresolved lines on this shipment. Do you want to proceed" will only appear if Quantity Shipped is less than Quantity Committed.

Sales Order Invoice Entry

For the prompt 'Do You Want to Ship Complete?', if answered 'Yes', the Quantity Shipped will be set to Quantity Committed. Quantity Committed cannot be changed and Quantity Shipped cannot exceed Quantity Committed.

Auto Generation of Sales Order Invoice is NOT supported.

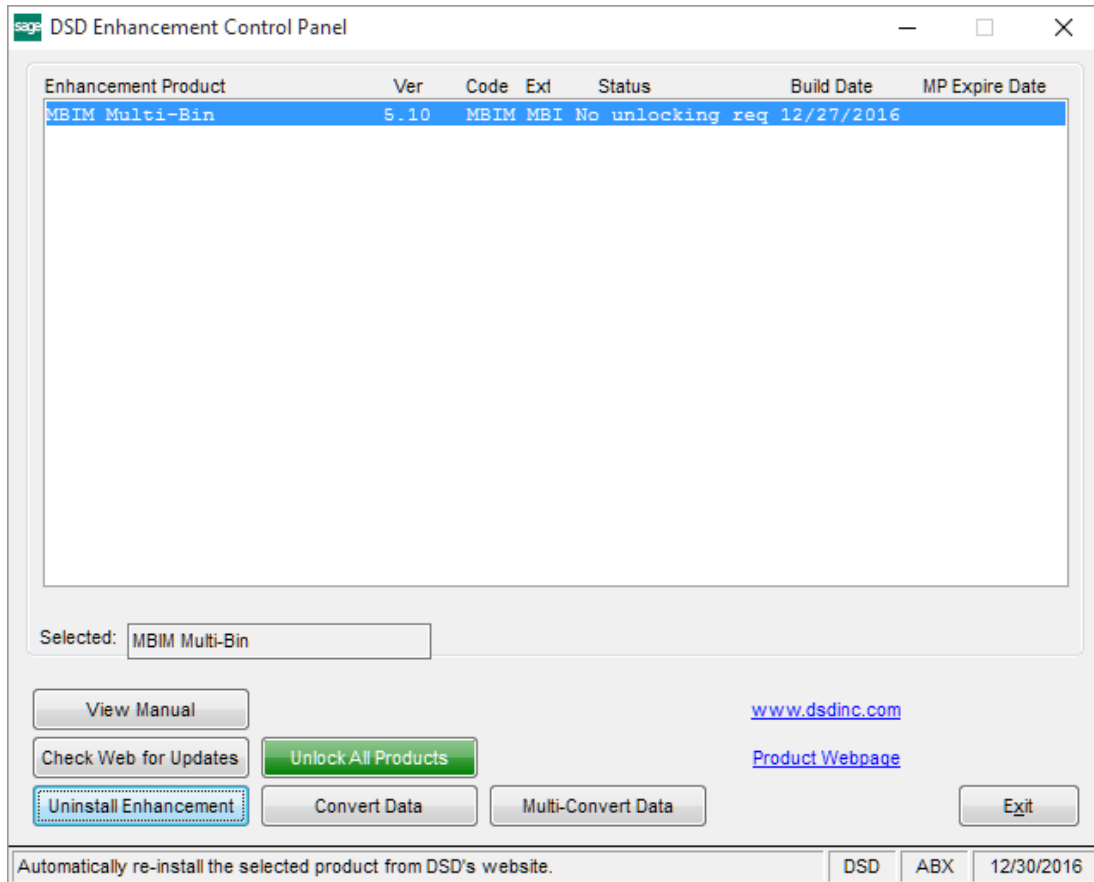
Sales Journal Update

Sales Journal Update will relieve 'Quantity On Order' and 'Quantity Committed' from the Item Warehouse Detail file.

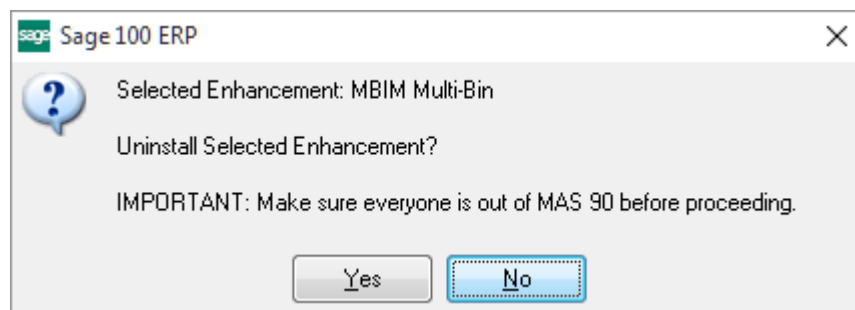
No back orders will be created for partially-shipped Invoices. The Sales Journal update will not change the order type *nor* move quantities into the formerly 'Quantity B/O' field. 'Quantity Shipped' will continue to be written back to the appropriate field.

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.

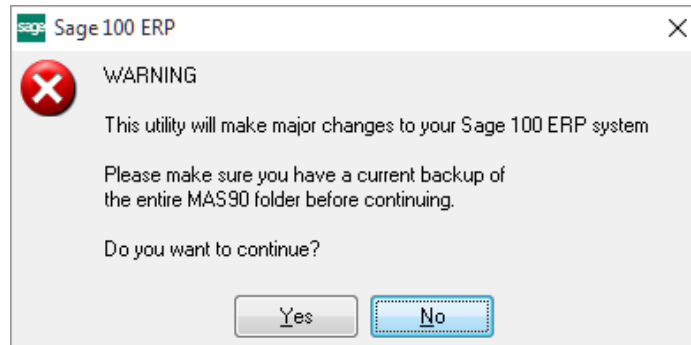


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



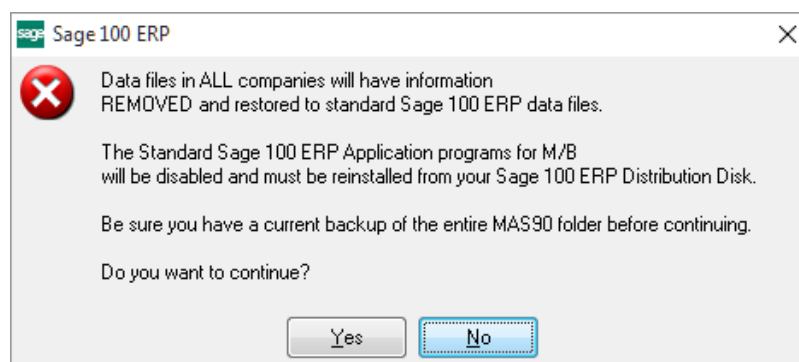
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

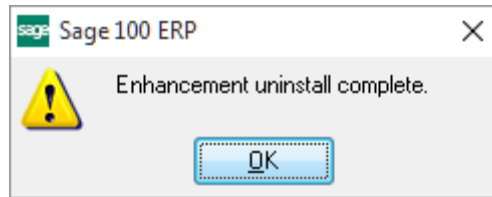
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).