



DSD
BUSINESS SYSTEMS

DSD Business Systems

Sage 100 Enhancements

S477

Auto Create One Purchase Order from S/O Entry

SO-1477

Version 5.00



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Auto Create One Purchase Order from S/O Entry User's Manual
Version 5.00

13 August, 2013

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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*

S477 Auto Create One Purchase Order from S/O Entry:

<http://www.dsdinc.com/enh/pages/S477.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.

Auto Create One Purchase Order from S/O Entry Features

This DSD Extended Solution adds a 'Create PO' Button to the Sales Order Totals tab that is active on Standard and Master Orders. This button allows the user to create one Purchase Order for all the Inventory Items on the Sales Order using the Primary Vendor of the first item or the vendor number in a specified S/O Detail UDF. Sales Order Quick Print will print the Purchase Order that has the same number as the Sales Order after the Sales Order is printed.

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	5.00

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.

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.

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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: DSD Business Systems
 Serial Number: 0555188

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

ABC 4/28/2010

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 registration, the Data Conversion window 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.

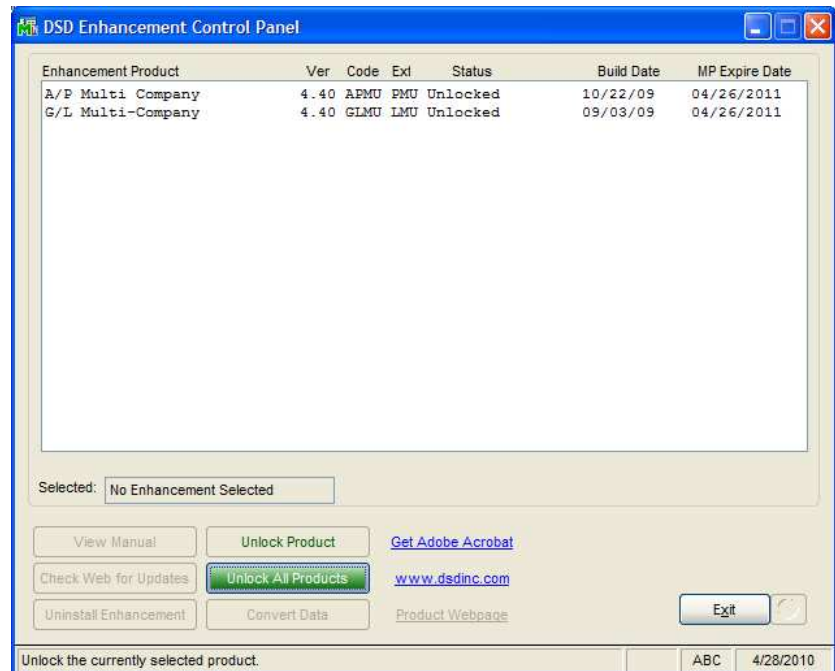
The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired 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 FTP web 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.*

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 Enhancements 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.

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.

There are also links to the DSD website and the Enhancement page on that site.

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.

SO-1477 Setup Options

SO-1477 Auto Create PO from SO

Enable DSD Extended Solution ☒ Level 5.00

Sales Order Detail UDF for 'Unit Cost' UNIT_COST Unit Cost

Sales Order Detail UDF for 'Vendor Number' VENDOR Vendor

Sales Order Header UDF for 'Required Date' REQUIRED_DATE Required Date

Accept Cancel

DSD ABC 6/25/2013

Sales Order Detail UDF for 'Unit Cost': Define the numeric type UDF to be used as the Purchase Order Unit Cost.

Sales Order Detail UDF for 'Vendor Number': Define the Uppercase type UDF with a length of 9 to be used as the Vendor Number.

Sales Order Header UDF for 'Required Date': Define the date type UDF to be used for the Purchase Order Header and Line Required Date.

Role Maintenance

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

- K Extended Solutions Setup

The following Security Event has been added to Sales Order:

- Auto Create One Purchase Order from S/O Entry

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.

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

Section D: System Operations

Sales Order Entry

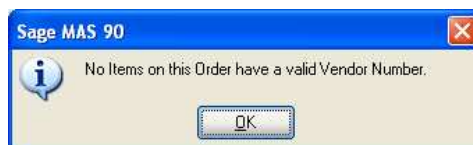
When a user is authorized to auto create purchase orders, the 'Create PO' button is active on the Sales Order Totals screen for Standard and Master type orders. When clicked, it will attempt to create a Standard type Purchase Order with the same number as the Sales Order using either

- the Vendor Number UDF value, if specified in Setup, in the form of division and vendor number without a dash (ex. 01AIRWAY) or
- the Primary Vendor Number associated with the first inventory item on the order.

If there is no valid vendor number in the UDF, then it will check the item's Primary Vendor.

If there is not a valid Tax Schedule set for the vendor, no Purchase Order will be created.

If there is no Primary Vendor, then no Purchase Order will be generated and the user will receive the following message:



If the Purchase Order number already exists, then no Purchase Order will be created and the user will receive the following message:



The following message will appear if the sales order number is the same as a deleted purchase order number. Answer 'Yes' to reuse the Purchase Order number. Answer 'No' to not generate the Purchase Order.



Each Purchase Order's Ship To Address fields will default from the Sales Order's Ship To Address fields. All Inventory Item Lines on the Sales Order will be copied to the Purchase Order, with the 'Quantity Ordered' on the Purchase Order set to the 'Quantity Ordered' from a standard Sales Order or the 'Original Quantity' from a master Sales Order using the Sales Order's Unit of Measure. The line's Warehouse will default from its corresponding Sales Order line's Warehouse.

If a UDF is specified to hold the Unit Cost and the UDF value is greater than zero, then the UDF will be used. Otherwise, the Unit Cost from Inventory for that item's valuation method, with UOM conversion factor applied when applicable, will be used. All other fields (header and line) will default per standard Sage 100.

If a UDF is specified to hold the Required Date and the UDF contains a non-blank value, the Purchase Order Header's 'Date Required' field and each Purchase Order Line's 'Req'd Date' field will be set to the UDF value.

Only Standard type Purchase Orders will be created; therefore, if the S/O line is marked as a Drop Ship, it will not be considered Drop Ship in Purchase Order.

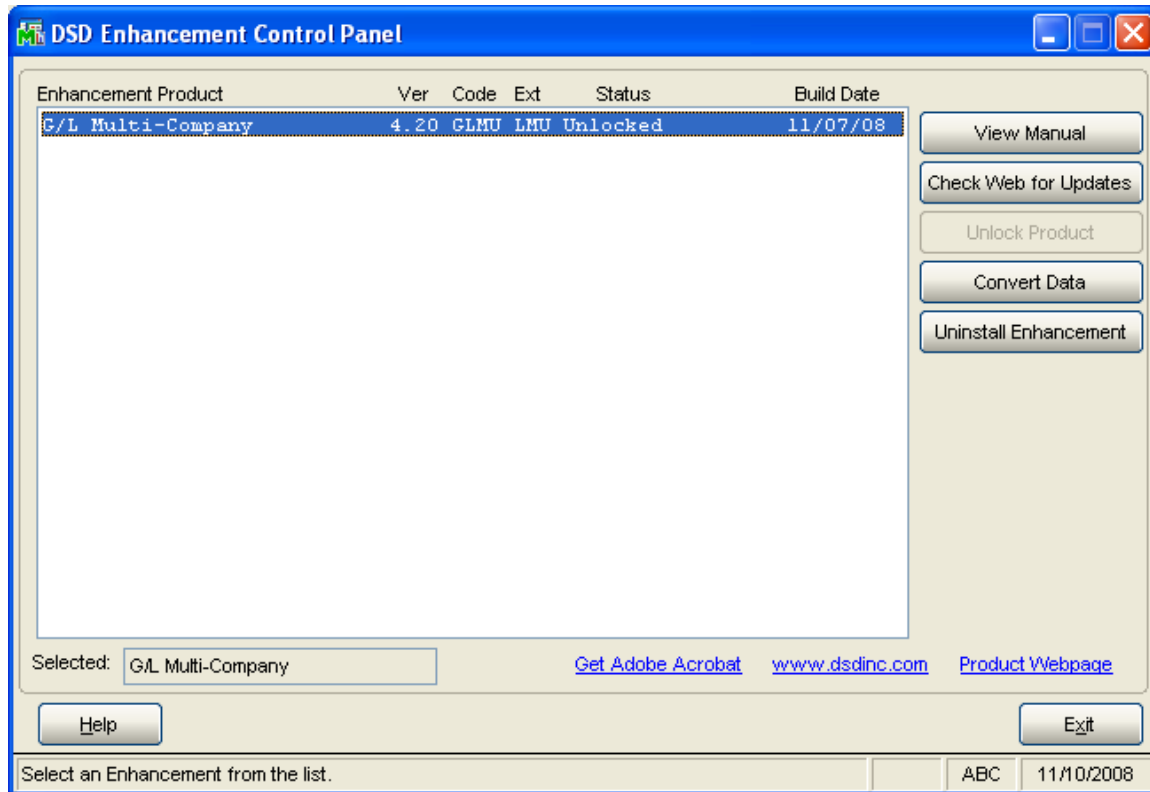
When Purchase Order creation is completed, the user will be prompted to print the Sales Order and the Purchase Order.



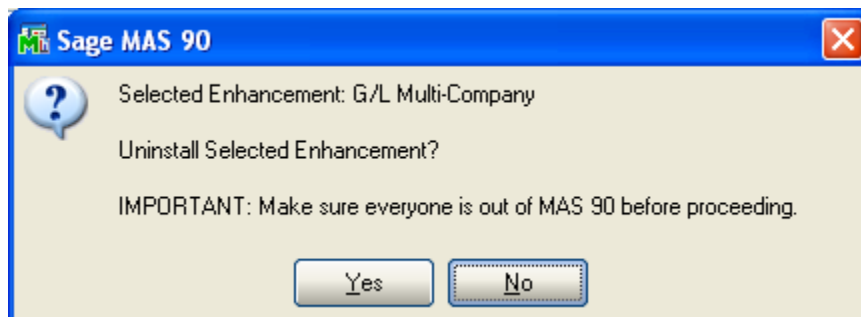
The Quick Print button has been modified to print the Purchase Order with the same order number after the Sales Order has printed. The standard Purchase Order Quick Print dialog will appear. If no Purchase Order of the same number exists, then only the Sales Order will print.

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.

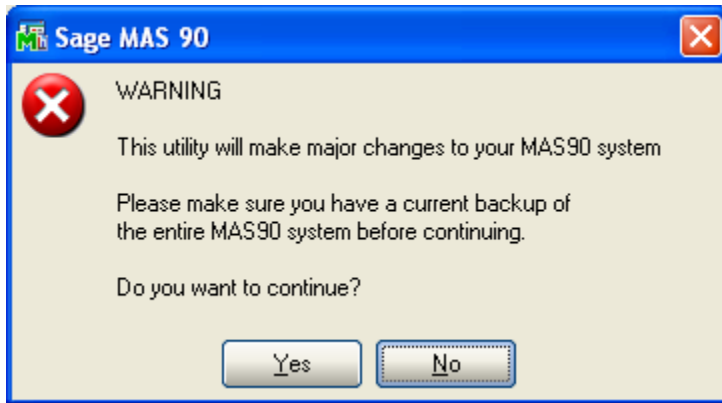


When accessing the **DSD Utility Suite**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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 MAS90 system should be completed prior to uninstalling a DSD product.

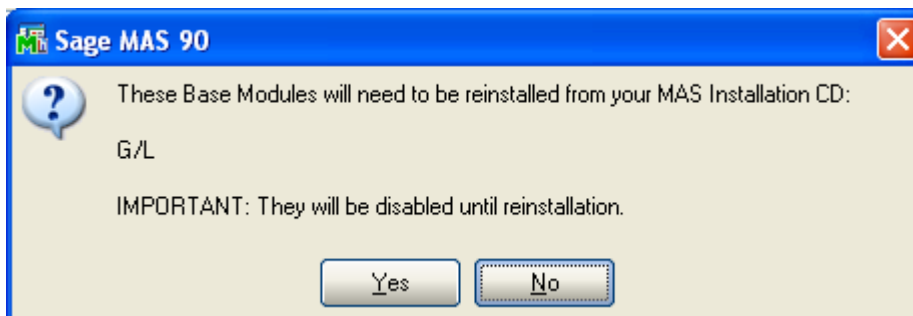


Select **No** to exit the Uninstall Process.

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 MAS Service Packs / Updates, if applicable.

The following message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.



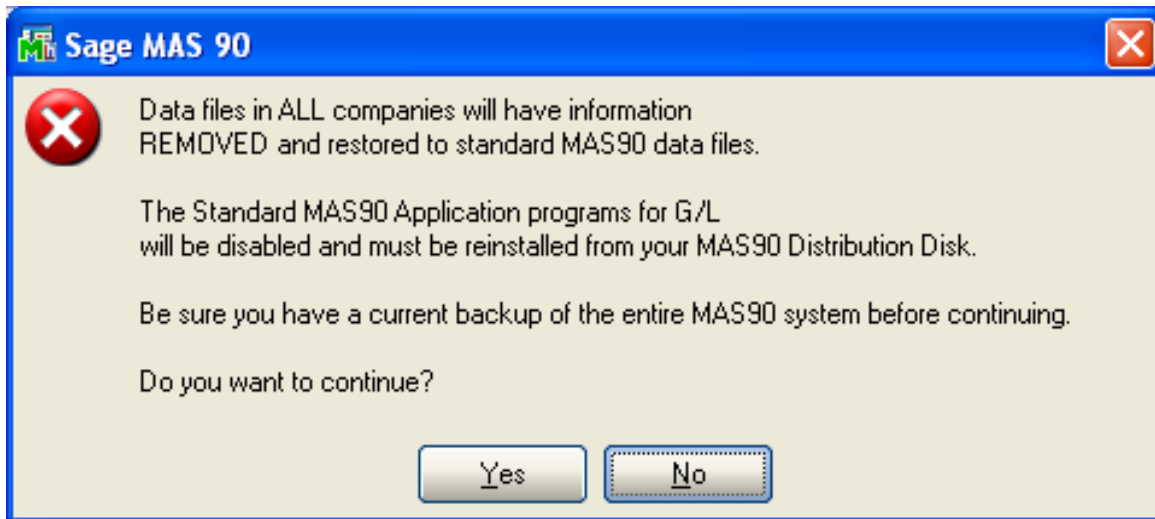
Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process.

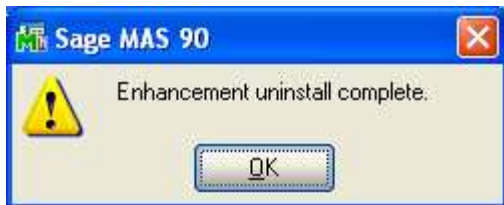
The following message box will appear, displaying the final warning message.

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).

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Fax Transmittal Form

To:	DSD Business Systems Customer Service		Fax:	858/550-4900
From:	Name:		Phone:	
	Company:		Fax:	
Date:	/ /	# Pgs Including this Page:		
Subject:	Check One: ☒ Product Problem ☒ Suggestions			
Product:	S477 Auto Create One Purchase Order from S/O Entry		Version:	5.00

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