



DSD Business Systems

Sage 100 Enhancements

S532

Sales Order Defaults

SO-1532

Version 7.00



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Sales Order Defaults User's Manual
Version 7.00

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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*

S532 Sales Order Defaults:

<http://www.dsdinc.com/enhancement/sales-order-defaults-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.

Sales Order Defaults Features

This DSD Extended Solution to the Sales Order module adds field defaulting and processing changes to Sales Order entry and Sales Order Invoice entry. Please review the Setup section for a listing of this Extended Solution's capabilities.

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	7.00

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.*

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.

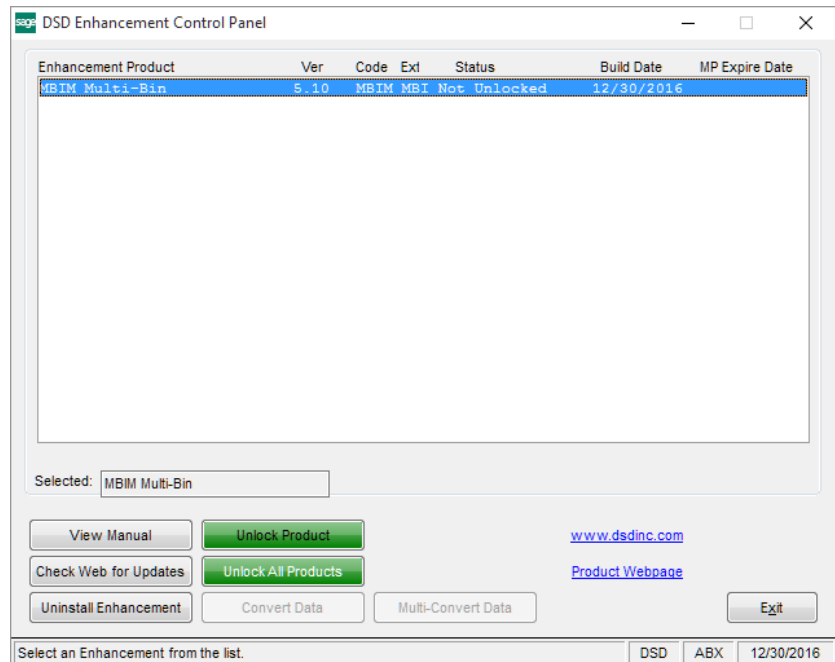
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct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

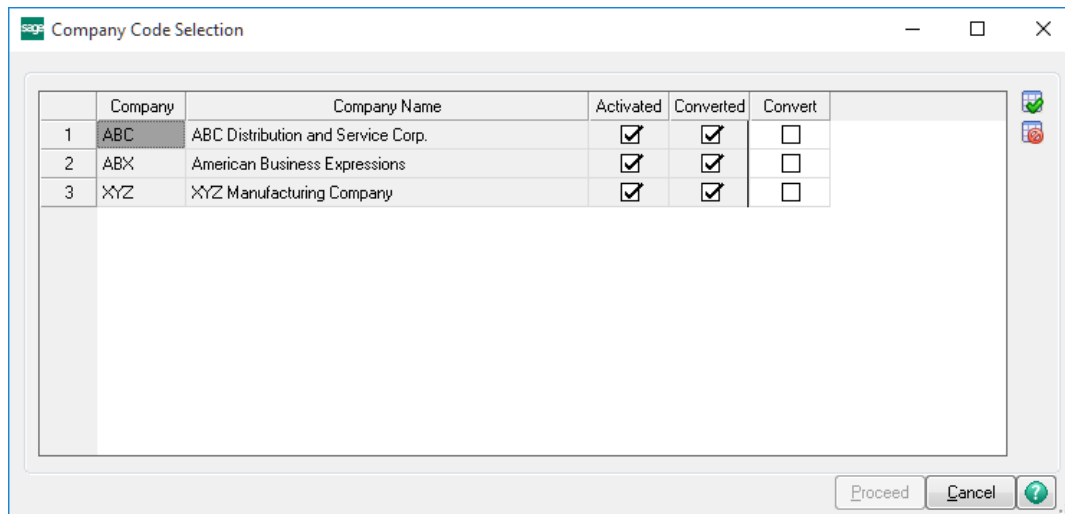
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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 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.

The screenshot shows a window titled "SO-1532 Setup Options" with a close button (X) in the top right corner. Inside the window, the title "SO-1532 Sales Order Defaults" is centered. Below the title, there is a section with "Enable DSD Extended Solution" checked and "Level 7.00" displayed. Below this, there are five tabs: "Header Options" (selected), "Lines Options I", "Line Options II", "Operation Options", and "Update Options". Under the "Header Options" tab, the following settings are visible:

- Default Sales Order Type: Standard (dropdown)
- Default Sales Order Status: New (dropdown)
- Use A/R Comment Field As Default: ☐
- Force Ship To Code Entry: ☐
- Prompt to Recalculate Freight: ☐
- Append User ID to 'Next' Order Number: ☐
- Prevent Refresh of 'Confirm To' Field: ☐
- Default Credit Limit: .00 (text field)
- Default Sales Order Type for 'Copy From': Standard (dropdown)

At the bottom right of the dialog box are "Accept" and "Cancel" buttons. At the very bottom, there is a status bar with the text "DSD ABC 6/1/2021".

Answer the following prompts on the Header Options tab:

Default Sales Order Type: Select the default for the Order Type: <None>, Backorder, Master, Quote, Repeating Order, or Standard.

Default Sales Order Status: Select New, Open, or Hold as the default Status for a sales order.

Use A/R Comment Field as Default: Check this box to default the A/R Customer Comment to the Sales Order or Sales Order Invoice header comment field.

Force Ship To Code Entry: If you check this box, and at least one Ship To Location Code exists for the customer, you will not be able to leave the Ship To Location Code blank during Sales Order and Sales Order Invoice Data Entry.

Prompt To Recalculate Freight: Check this box if you wish to be prompted to recalculate freight during Sales Order Entry and Invoice Entry. This option has no effect on shipping codes with a calculation type of 'Product Line'; it will always recalculate without prompting first.

Append User ID to 'Next' Order Number: Check this box to append the Sage 100 User ID to the 'Next' Order Number. See Operations section below for details about this option.

Prevent refresh of 'Confirm To' field: Check this box to prevent the 'Confirm To' field from being refreshed by the Ship To Location Code's Contact when a Ship To Location Code is entered during Sales Order Entry and Invoice Entry. See Operations section below for details about this option.

Default Credit Limit: Enter the default Credit Limit for customers created on the fly in Sales Order module.

Default Sales Order Type for 'Copy From': Select the default Order Type for the 'Copy From' option in Sales Order Entry: <None>, Backorder, Master, Quote, Repeating Order, or Standard.

Answer the following prompts on the Lines Options I tab:

Always Display Standard Cost During Line Entry: Check this box to always display the Standard Cost while on the Unit Price field during S/O Line Item Entry.

Protect Line Item Price from Changes Due to Quantity: Check this box to prevent a change to the unit price on the sales order as changes are made to the Quantity field.

Remove Lines With Zero Qty Ordered On Std Order: If you check this box, zero Quantity lines will be removed from Standard Orders when you exit the lines screen. If you have Sage Software Extended Solution SO-1314: *Repeating Order Write Back From Standard Orders* installed and enabled, the deletion of zero Quantity lines will occur after the update/creation of the Repeating Order.

Automatic Back Order of Unavailable Quantities: Checking this box has the same effect as selecting 'Backorder Items Not On Hand' from the 'Qty Order Exceeds...' pop-up window in standard Sage 100.

Display Qty On Hand/Available During Inv Qty Shipped Entry: Check this box to display Quantity On Hand/Available while the cursor is in the Quantity Shipped field during Sales Order Invoice Data Entry.

Display Qty On Hand/Available During S/O Qty Ordered Entry: Check this box to display Quantity On Hand and Qty Available (for the warehouse referenced on the line) while the Quantity Ordered field has focus during Sales Order data entry.

Display FIFO Item's First Cost: Check this box if you wish to display a FIFO Inventory item's First Cost instead of the Average Cost in Sales Order and S/O Invoice entry. See the Operation section below for details about this option. In addition, if this box is checked and you checked 'Display Profit Margin Percent' in S/O Setup then the FIFO Item's First Cost will be used to calculate gross margin percent.

Default Line Item Quantity: Enter the default line item Quantity Ordered for new line entry. The default quantity does not cause the 'Qty Order Exceeds...' pop-up window in standard Sage 100 if this quantity does not have enough quantity on hand. This default may be overridden during S/O Order and Invoice data entry.

UOM Causing Unit Price To Be Displayed Multiplied by 1000: Enter one UOM value that causes the display of Unit Price x 1,000 during S/O Order and Invoice Entry.

SO-1532 Setup Options

SO-1532 Sales Order Defaults

Enable DSD Extended Solution ☒ Level 7.00

Header Options Lines Options I **Line Options II** Operation Options Update Options

Warn if Invoice Qty Shipped Exceeds None

Item Masterfile UDF for 'Drop Ship Flag Default'

Suppress 'Quantity Shipped Exceeds Quantity Ordered' Prompt ☐

Display Line in Red When Insufficient Qty During Order Entry ☐

Accept Cancel

DSD ABC 6/1/2021

Answer the following prompts on the Lines Options II tab:

Warn if Invoice Quantity Shipped Exceeds: You may choose to display a warning in Invoice Data Entry that Quantity Shipped is greater than Quantity Available, Quantity On Hand or None.

Item Masterfile UDF for 'Drop Ship Flag Default': Specify a C/I Item UDF (Check Box type) which denotes the default value for a sales order line's 'Drop Ship Flag'. If the UDF is checked in Item Maintenance, the item will default to Drop Ship in Sales Order Entry.

Suppress 'Quantity Shipped Exceeds Quantity Ordered' Prompt: If you check this box, the 'Quantity Shipped Exceeds Quantity Ordered' warning will not appear in Sales order Invoice Data Entry.

Display Line In Red When Insufficient Qty During Order Entry: Check this box to display the sales order row in RED if the quantity available for this item in this warehouse negative. This will only apply to Standard and Back Order type orders.

The screenshot shows a software window titled "SO-1532 Setup Options" with a close button (X) in the top right corner. Inside the window, the title "SO-1532 Sales Order Defaults" is centered. Below the title, there is a section with a checkbox labeled "Enable DSD Extended Solution" which is checked, and a text field labeled "Level 7.00". Below this, there are five tabs: "Header Options", "Lines Options I", "Line Options II", "Operation Options" (which is selected and highlighted with a dashed border), and "Update Options". Under the "Operation Options" tab, there are two checkboxes: "Sales Order Quick Print to 'Auto' Accept" and "Refresh Sales Orders with Customer Information", both of which are currently unchecked. At the bottom right of the dialog, there are "Accept" and "Cancel" buttons. At the very bottom of the window, there is a status bar with three fields: "DSD", "ABC", and "6/1/2021".

Answer the following prompts on the Operations Options tab:

Sales Order Quick Print to 'Auto' Accept: Check this box to remove the prompt 'Do You Want To Save Changes' when clicking the Quick Print button in Sales Order.

Refresh Sales Orders With Customer Information: Check this box if you wish to refresh the Sales Order Header fields (Customer Name, Address Lines, City, State, Zip, Country, Contact, Tax Schedule) as the fields are modified **via the 'Customer' button in Sales Order Entry**. Ship To Address fields (if Ship To Location Code is blank) will also be updated file.

SO-1532 Setup Options

SO-1532 Sales Order Defaults

Enable DSD Extended Solution ☒ Level 7.00

Header Options Lines Options I Line Options II Operation Options Update Options

Set Pick Sheet Flag to 'Y' on Back Orders ☐

Set Print Order Flag to 'Y' on Back Orders ☐

Set Back Order Status to 'Hold' ☐

Accept Cancel

DSD ABC 6/1/2021

Answer the following prompt on the Update Options tab:

Set Pick Sheet Flag to 'Y' On Back Orders: Check this box to set the 'Print Pick Sheets' box to checked during Sales Journal Update.

Set Print Order Flag to 'Y' on Back Orders: Check this box to set the Sales Order's 'Print Order?' box to checked during Sales Journal Update.

Set Back Order Status To 'Hold': When you check this box, the Order Status will be set to 'Hold' when a Back Order is created during Sales Order Sales Journal Update. No changes have been made to the default Status of a manually-created order whose order Type is set to 'Back Order.'

Role Maintenance

The following Module Options have been added to Sales Order:

- Allow User to Change Defaulted Sales Order Status
- Allow User to Change Terms Code on Sales Order
- Allow User to Change Terms Code on Invoice
- Only Present Reason Code Prompt When Retaining Sales Order History
- Allow User to Access Sales Orders After Picking Sheet Printed

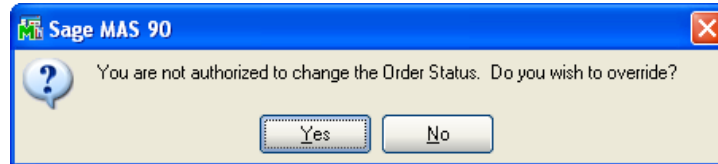
You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

Section D: System Operations

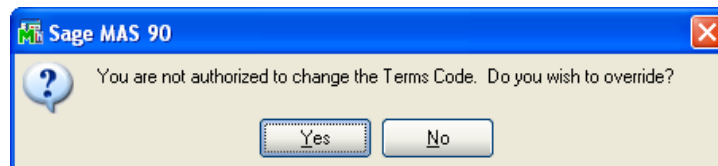
Field defaulting and processing changes to Sales Order entry and Sales Order Invoice entry will take place as documented in Setup. Here are more specific notes on some of the features:

Role changes

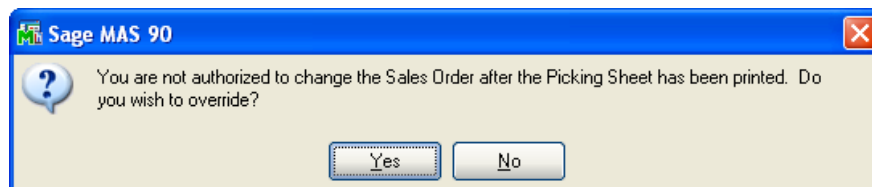
Those who are not associated with 'Allow User to Change Defaulted Sales Order Status', will receive the following warning if they attempt to change that field.



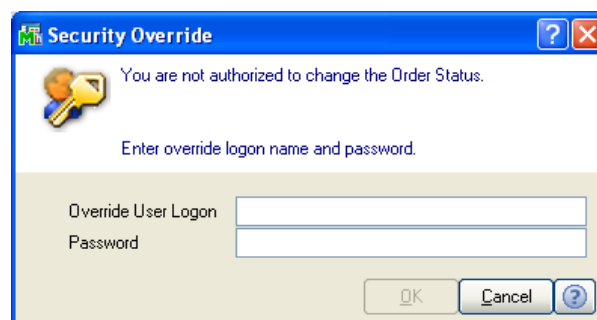
Those who are not associated with 'Allow User to Change Terms Code on Sales Order' or 'Allow User to Change Terms Code on Invoice' will receive the following warning if they attempt to change that field.



Those who are not associated with 'Allow User to Access Sales Orders After Picking Sheet Printed' will receive the following warning if they attempt to access the Sales Order after the Picking Sheet is printed.



In all instances, clicking No will return the user to the order with field's value set to the default. Click 'Yes' to access Security Override which allows entry of the logon and password for one who is associated with the module options. Click ok to proceed to the Sales Order.



Default Sales Order Type

The type you selected during setup will become the default setting for the 'Sales Order Type' option on the Sales Order (not S/O Invoice) Default Values screen. When <None> is selected, the sales order type field will default to none, and the user must select a valid order type before leaving the order entry header tab.

Force Ship To Code Entry

If you answered 'Y' in Setup, you will not be able to leave the Ship To Code blank if at least one Ship To Code exists for the customer during Sales Order and Sales Order Invoice Data Entry.

Prompt to Recalculate Freight

If you checked this box in Setup, during Sales Order Entry and Invoice Entry, you will be prompted to choose whether or not to recalculate freight whenever Sage 100 is going to recalculate freight on an existing order or invoice. This option does not affect shipping codes with a calculation type of 'Product Line'; it will always recalculate without prompting first.

Append User ID to 'Next' Order Number

When the '#' button is used to assign the next Sales Order Number during S/O Entry, the program will assign the next number from Setup, and then strip the first two digits. The first two characters of the Sage 100 User ID will be appended as the last two characters of the Sales Order Number. For example, if the next number normally assigned would be 0001024 and the User ID is TBA, then the Sales Order Number created will be 01024TB.

Prevent Refresh of 'Confirm To' field

If this box was checked in Setup, then when a Ship To Location Code is entered during Sales Order Entry or Invoice Entry, the program will *not* refresh the 'Confirm To' field with the Ship To Location Code's Contact.

Default Credit Limit

If you entered a value for Credit Limit in Setup, this value will be used as the default Credit limit for Customers created on the fly in the Sales Order module. This will not affect customers created in the Accounts Receivable module.

If you use the 'Copy' function to create a Customer, the value entered for Default Credit Limit in the Setup for this Extended Solution will not be used.

Remove Lines with Zero Quantity Ordered on Standard Orders

If you checked the 'Remove Lines With Zero Qty Ordered On Std Order' box in Setup, zero Quantity lines will be removed from Standard Orders as you exit the lines tab.

Display Quantity On Hand/Available

While the cursor is on the Quantity Ordered field of Sales Order Entry and S/O Invoice Entry, the Quantity On Hand and Quantity Available for the item will display in the prompt line portion of the screen. This applies only to Inventory lines.

Display FIFO Item's First Cost

When the cursor is present on the Unit Price field of a FIFO inventory item in Sales Order Entry and S/O Invoice Entry, the item's First Cost and Quantity On Hand will be displayed instead of the standard Sage 100 display of Average Cost. The First Cost is the Unit Cost in the first record in the Inventory Item Costing File that contains a Quantity on Hand greater than zero. If no record meets this requirement, the item's Average Cost will be displayed.

The FIFO Item's First Cost will be used to calculate gross margin percent if you also checked 'Display Gross Margin Percent' in S/O Sage 100 Setup.

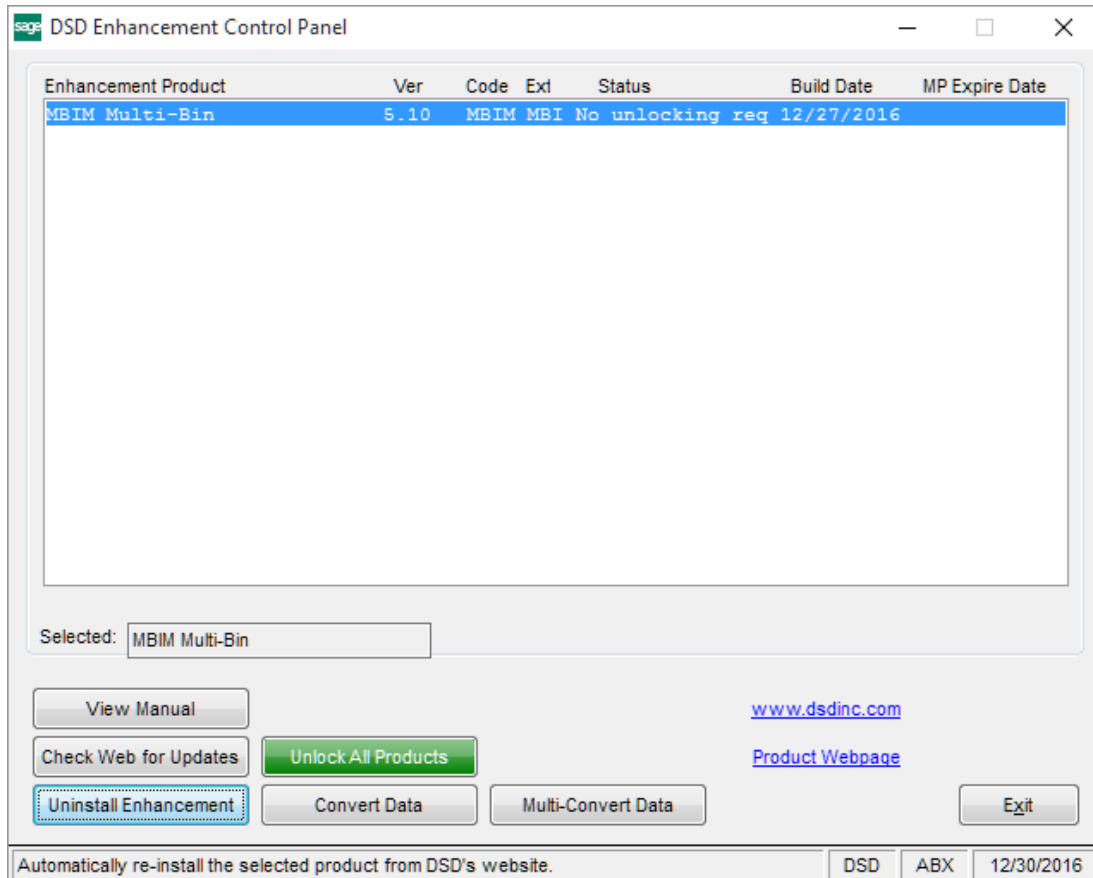
Warn If Invoice Quantity Shipped Exceeds Quantity Available/On Hand

Invoices that references a Sales Order number will perform an abbreviated version of standard Sage 100 Quantity Checking as part of Invoice entry. If the inventory line's Quantity Shipped is greater than Quantity Available or Quantity On Hand (depending on what you selected in Setup), then a warning will appear. *You must answer No to the 'Do You Want to Ship Complete' in Invoice entry to be prompted for insufficient quantity.*

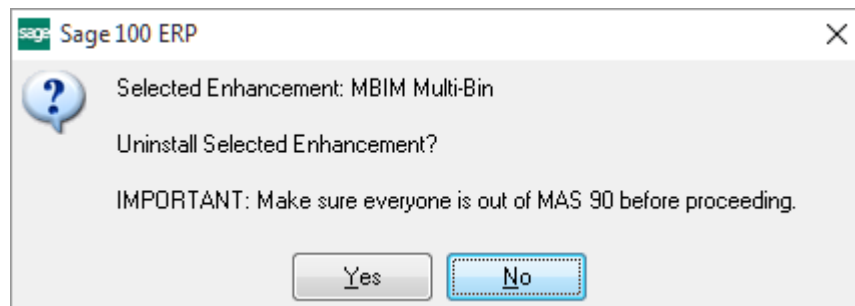


Section E: Uninstall DSD Enhancements

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.

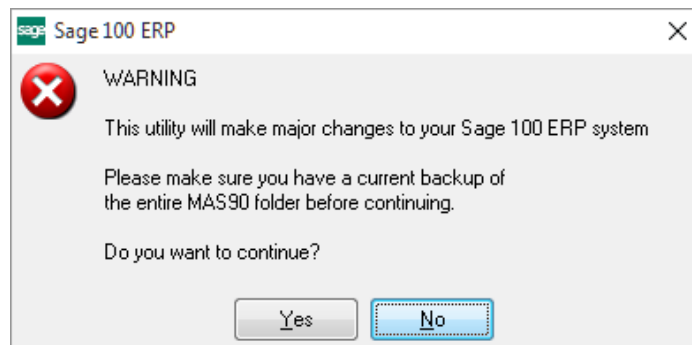


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



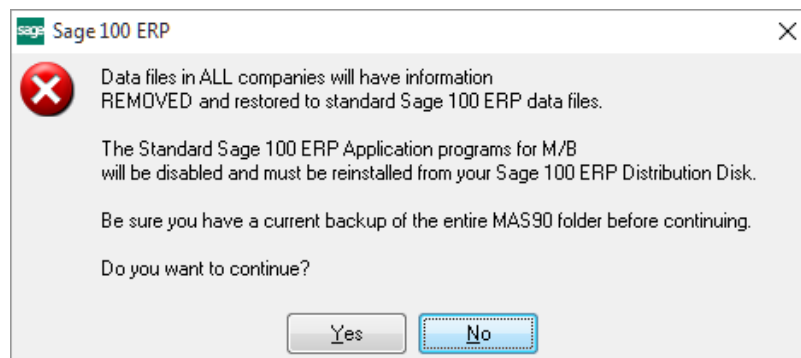
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

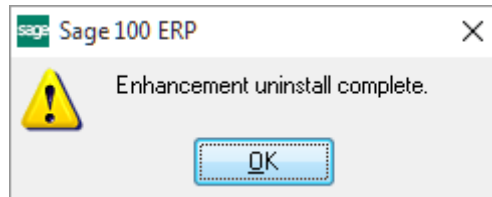
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).