

DSD Business Systems

Sage 100 Enhancements

S451

Sales Promotions for Item Pricing and Commissions 50-1541

Version 7.00





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Sales Promotions for Item Pricing and Commissions User's Manual Version 7.00

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DSD Business Systems 8787 Complex Drive Suite 400 San Diego, CA 92123 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

EEEE Sales Promotions for Item Pricing and Commissions:

http://www.dsdinc.com/enh/pages/EEEE.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 remotely or by some other to duplicate the system.

Sales Promotions for Item Pricing and Commissions Features

This DSD Extended Solution to the Sales Order adds Sales Promotions Maintenance, which allows commission and inventory item pricing to be associated with a sales promotion.

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	Required
Module	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 <u>DSD Enhancement Control Panel</u> 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.

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

License Agreement				^
YOU MUST READ THIS AGREEMENT C AGREEMENT USING THE SLIDER CONT	OMPLETELY AND AGREE BEFORE PROCEEDING. TROL.	SCROLL THRC	UGH THI	s
IN ACCORDANCE WITH THE TERMS SE PACKAGE CONSTITUTES ACCEPTANC THE CUSTOMER MAY OBTAIN A FULL	NSED BY DSD BUSINESS SYSTEMS, INC. TO CU T FORTH IS THIS CUSTOMER LICENSE AGREEME E OF THESE TERMS. IF THE TERMS OF THIS LICE REFUND OF ANY MONEY PAID IF THIS UNUSED, THE DEALER FROM WHICH IT WAS ACQUIRED.	NT. OPENING C	R USING	THIS ABLE,
				~
Agree to License Agreement	3 Call DSD at 858-550-5900			
Agree O Disagree	Have this infomation ready: End User Name	DSD Busines	ss Syster	ms
Select Unlocking Type	Serial Number	0555188		
Veb File Demo Manual Entry	4 Enter the following from DSD			
	Activation Key: Click to Unlock: Unlock Product			
				Exit

👓 DSD Conversion Wizard: Step One, Introduction

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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

Enhancement Product		Ver C	ode l	Ext Status		Build Date	MP E	xpire Dat	te
MBIM Multi-Bin	5	.10 N	IBIM I	MBI Not Unl	ocked	12/30/2016			
Selected: MBIM Multi-Bin									
Selected: MBIM Multi-Bin									
Selected: MBIM Multi-Bin View Manual	Unlock Pro	duct]			www.dsdinc.com	1		
	Unlock Pro Unlock All Pri]			www.dsdinc.com Product Webpage			
View Manual		oducts		Multi-Convert Da				E <u>x</u> it	t

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.

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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.*)

Com	pany Code S	election				-	×
	Company	Company Name	Activated	Converted	Convert		
1	ABC	ABC Distribution and Service Corp.		I			6
2	ABX	American Business Expressions		☑			
3	XYZ	XYZ Manufacturing Company		☑			
						Proceed	 0

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 <u>Uninstall DSD</u> <u>Enhancements</u>)

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-1541 Setup Options				×
:	30-1541 SI	ls Promo for Itm Prc		
Enable DSD Extended Solution		Level 7.00		
			<u>A</u> ccept	<u>C</u> ancel
			DSD ABC	2/16/2022

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, Maintenance/Data Entry:

• Sales Promotion Maintenance

Section D: System Operations

The DSD Extended Solution adds Sales Promotion Maintenance to Sales Order Setup.

Sales Promotion	Maintenance	(ABC) 10/20/2020				_		×
Promotion Code	P1	S 14 4 1	• •					
Promotion Description	Promo #1							
Start Date	10/1/2020							
End Date	10/31/2020							
erms Code	01 🔍 Net	t 30 Days						
nvoice Due Date	10/31/2020							
Shipping Code	UPS BLUE	٩,						
Iter	n Code	Pricing Method	Discount	Commission Rate	Promo Retail		0	
1 1001-HON-	H252	Discount Percent	10.000	1.000	79.000		=>>	
2		Discount Percent	.000	0.000	.000 🗐		ÛE	
Item Description								
Standard Price		.000	0					
Retail Price		.000)					
Standard Cost		.000)					
					<u>∖</u> ccept <u>C</u> anc	el <u>D</u> e	elete	₿
hen selected yo	ou will be p	prompted to fill in	the followin	g:				

- End Date Terms Code: not required
- **Invoice Due Date:** not required
- Shipping Code: not required

After you have defined the above prompts you can then specify the following information:

Inventory Item: The description and the standard price will display.Pricing Method: (drop box) Price Override or Discount PercentDiscount: numeric, fill in either the override or the discount percentage from the standard price

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Commission Rate: numeric **Promo Retail:** numeric, enter a user determined price

Select the printer icon on Sales Promotion Maintenance to print a listing.

Custom Office

Three new options have been added to the Sales Order folder of User Defined Field and Table Maintenance: 'SO Sales Promo Detail (SO-1541),' 'SO Sales Promo Header (SO-1541),' and 'SO Sales Promotion Work' (Figure 5). The detail UDF's can be added to the primary or secondary grid of Sales Promotion Maintenance. These UDF's do not act as a data source for any other UDFs.

🔚 User-Defined Field and Table Maintenance (MAC) 1/15/2008	
To add or modify user-defined fields, double-click the corresponding modu and table. To add a user-defined table, right-click on the UDT module. T maintain or delete a user-defined table, right-click on the UDT.	
 SO Sales Promotion Detail (SO-1541) SO Sales Promotion Header (SO-1541) SO Sales Promotion Work (SO-1541) SO Sales Recap By Division Work SO Sales Recap By Product Line Work SO Sales Recap By Warehouse Product Line Work SO Sales Recap By Warehouse Work SO Sales Tax Journal Work SO Ship To Address Listing Work SO Shipping Exception Work SO Shipping Exception Work SO Shipping Exception Work SO Shipping Labels Work SO Shipping Rate Detail SO Shipping Rate Listing Work Mork Order System Tables [Recent] AP Manual Check Detail 	※「「く ■ 」」 3
	10

Sales Order Entry and Sales Order Invoice Entry

A new drop list button 'Promo' is added to Sales Order Entry and Invoice Entry, when clicked you will be able to enter or lookup a promotion code. You will only be allowed to enter a valid promotion code where the order date (or Invoice date if this is an Invoice which does not reference a sales order, or if additional lines are being added) falls into the promotion date range. When there is a valid Promotion Code, items belonging to the sales promotion will be priced according to the record in the file. If a terms code was specified with the promotion, then that value will default to the order or invoice.

🎆 * Sales Order Entry (SDN) 1/10/2007	
Order Number ABC0598	Opy from Defaults Customer Credit <u>4</u> . Totals
Order Date 1/2/2007 🧾 Order	Type Standard Order V Master/Repeating No.
Customer No. 01-ABF	American Business Futures Cust PO
Ship Date 1/2/2007	Ship To Addr 2 American Business Futures Terms Code 01 Net 30 Days Ship Via UPS BLUE FOB Confirm To John Quinn For E-mail artie@abf.com Immediate Salesperson 0100 Jim Kentley Split Comm. No Split Comm gl Coc Fax No. Batch Fax
Quick Print	Pr <u>o</u> mo

Ř	Repromotion Entr	У			<u>?</u> ×
	Promotion Code	PROM01	Q,	Sales Promo #1	
					<u>D</u> K <u>C</u> ancel

When the promotion code is changed, the terms code on the header will be changed as well. The following warning will also appear:

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Click 'Yes' if you wish to update the pricing on the lines with the new promotion code pricing. If you entered a promotion code that does not fall within the date range given you will receive the following message:



When you change the order date or invoice and the Promotion Code is no longer valid for the date listed, you will be asked if you want to update the pricing on the lines.

🚮 Sage	e MA5 90	x
?	Promotion Code is no longer valid for this date. Do you want to update the pricing on the lines?	
	Yes No	

Sales Journal Update

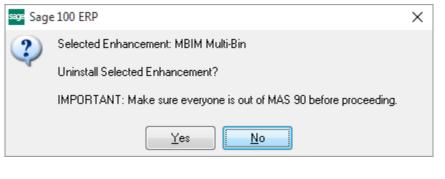
Sales Journal Update will commission the items associated with the Promotion and which are subject to commission according to the rate associated with the Promotion Code Maintenance for that item at the time of update. The items will be commissioned per standard Sage 100 logic when a Promotion Code is no longer on file.

Section E: Uninstall DSD Enhancements

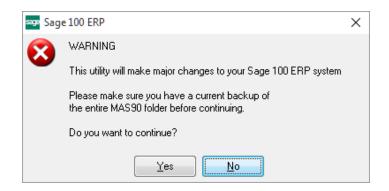
A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.

DSD Enhancement Control Panel						-	_	
Enhancement Product	Ver	Code	Ext	Status	Buik	l Date	MP Exp	oire Date
MBIM Multi-Bin	5.10	MBIM	MBI	No unlocking r	eq 12/2	7/2016		
Selected: MBIM Multi-Bin								
View Manual		_			<u>www.ds</u>	dinc.com		
	Products					dinc.com Nebpage		
			Multi-	Convert Data				E <u>x</u> it

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.



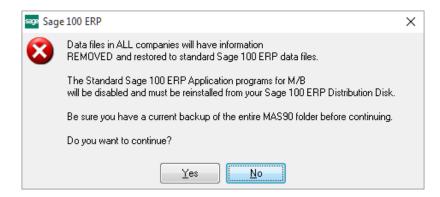
Select **No** to exit the Uninstall Process. Select **Yes** to continue with the Uninstall Process.

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.

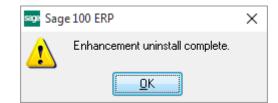


Select No to exit the Uninstall Process.

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.

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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).