



DSD Business Systems

Sage 100 Enhancements

SOPR

S/O “PickRight”

Version 7.40



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S/O “Pick Right” User's Manual
Version 7.40

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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.dsding.com>

The Enhancement page contains:

*Current Release Schedule
Purchasing Information
Installation Instructions
Product Support
Enhancement Links*

SOPR S/O Ship To Split Commissions:

<http://www.dsding.com/enh/pages/SOPR.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.

S/O Pick Right Features

This DSD enhancement to S/O Picking Sheet Printing is modified to generate export files formatted for ProCat's "PickRight"

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 | 7.40 |

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.

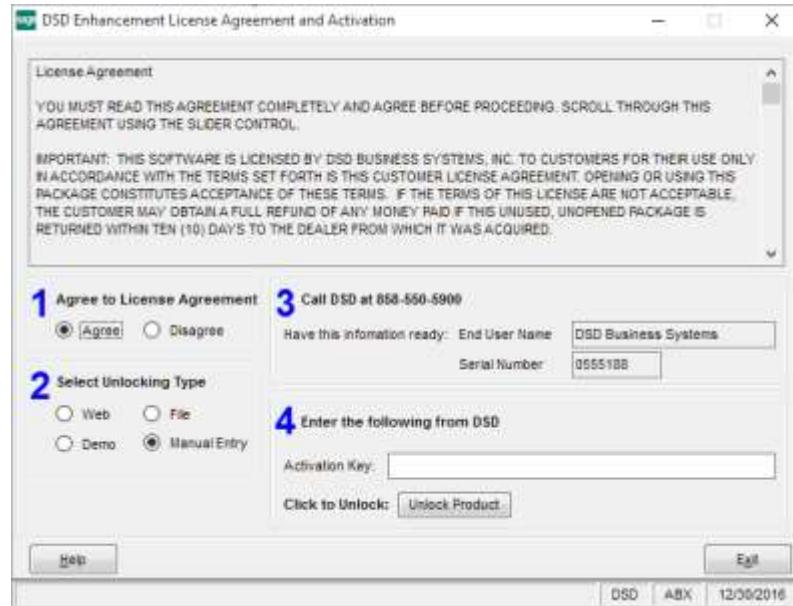
File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

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.

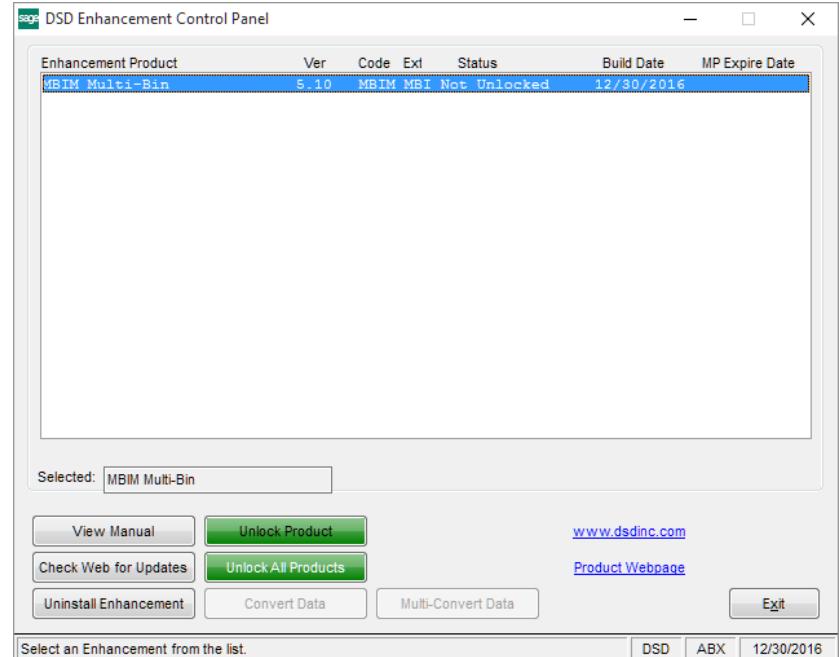


DSD Enhancement Control Panel

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.



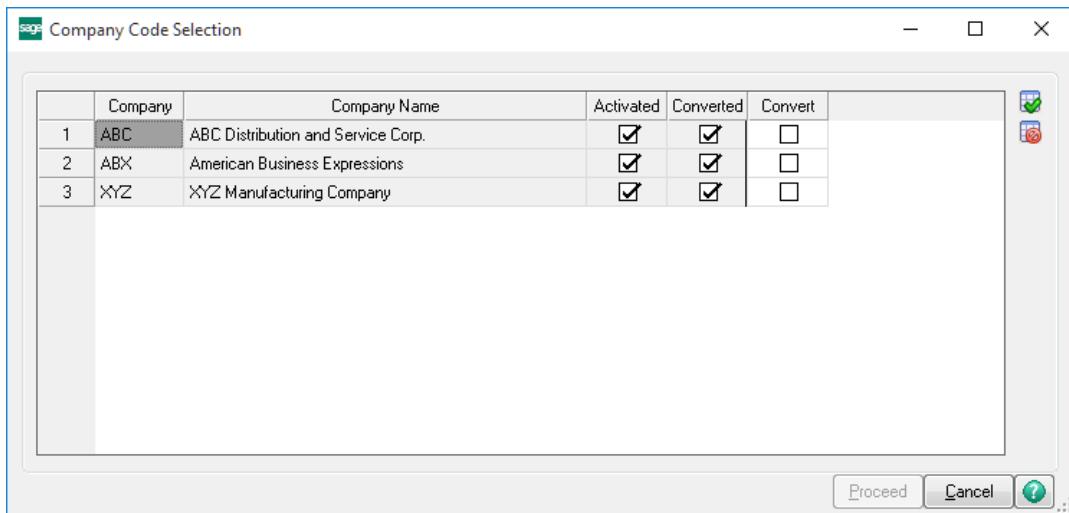
Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

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

UDFs to be created:

Table Name: SO_SalesOrderHeader

Field Names:

1. UDF_SENT_TO_PR, Checkbox
2. UDF_SENT_TO_PR_DATE
3. UDF_SENT_TO_PR_TIME, String, Length 10
4. UDF_REC_FROM_PR, Checkbox
5. UDF_REC_FROM_PR_DATE
6. UDF_REC_FROM_PR_TIME, String, Length 10

Section D: System Operations

The export files will be created in the following location: ...\\MAS90\\MAS_XXX\\SOXXX\\Export

The naming convention for the file is as follows: SalesOrderNo + WarehouseCode + MID(itemWarehouse.BinLocation,1,2) + ".imp"

Note: If an .imp file already exists in the directory for a given Sales Order, the file will be erased, and a new one created.

The printing process will also be modified to update the following Sales Order Header UDF values for each order export file successfully created.

- i. UDF_SENT_TO_PR = “Y”
- ii. UDF_SENT_TO_PR_DATE = System Date
- iii. UDF_SENT_TO_PR_TIME = System Time

Sales Order Entry will:

If the UDF_SENT_TO_PR = “Y”, the order’s UI access will be set to “View Only”

- i. Note: The field control will be disabled via Custom Office

The Sales Order “Write” function for only VI imports, perform the following:

- a. UDF_REC_FROM_PR = “Y”
- b. UDF_REC_FROM_PR_DATE = System Date
- c. UDF_REC_FROM_PR_TIME = System Time
- d. UDF_SENT_TO_PR = “N”

| Numeric Fields | Right Justified | | | |
|-------------------------------|-----------------|-------|--------|--|
| Field Name | Type | Start | Length | Description |
| Record designator | C | 1 | 1 | "H" for header |
| Unit of Work - must be unique | C | 2 | 16 | Unit of work number – must match the file name without the .imp. Typically, naming is the invoice number and pick area |
| Customer name | C | 18 | 30 | Name of customer for Unit of Work |
| Customer number | C | 48 | 10 | Number of customer for Unit of Work |
| Jurisdiction | C | 58 | 14 | Name of tax jurisdiction for unit of work - If more than one, use lowest level jurisdiction |
| Number of Detail Records | N | 72 | 6 | Total number of line items - used to validate file integrity |
| Invoice number | C | 78 | 16 | Invoice number for Unit of Work |
| Order Number | C | 94 | 16 | Order number |
| Memo Number | C | 110 | 16 | Memo Number |
| Route Name | C | 126 | 20 | SO_SalesOrderHeader.UDF_Route |
| Route Number | C | 146 | 5 | SO_SalesOrderHeader.UDF_Frequency |
| Stop Number | C | 151 | 5 | SO_SalesOrderHeader.UDF_Stop |
| Street Address 1 | C | 156 | 25 | Customer address line 1 |
| Street Address 2 | C | 181 | 25 | Customer address line 2 |
| City | C | 206 | 25 | City |
| State | C | 231 | 2 | State |
| Zip Code | C | 233 | 10 | Zip Code plus 4 |
| Phone Number | C | 243 | 20 | Phone number and possible extension |
| Delivery Date | C | 263 | 10 | Delivery Date with format: YYYYMMDD |
| Door | C | 273 | 3 | Loading Door Number |
| Pick Area | C | 276 | 10 | Pick Area - Can be WHS |
| Pick Area Description | C | 286 | 20 | Pick Area Description - Can be WHS |
| Number of Cigarette Ctns | N | 306 | 5 | Number of Cartons on Order - may be 0 |
| Print Packing List | C | 311 | 1 | Y or N Flag for printing a packing list - Default to Y |
| Comment line 1 | C | 312 | 35 | Label message #1 |
| Comment line 2 | C | 347 | 35 | Label message #2 |
| Comment Line 3 | C | 382 | 35 | Pick Ticket Message #1 |
| Comment Line 4 | C | 417 | 35 | Pick Ticket Message #2 |

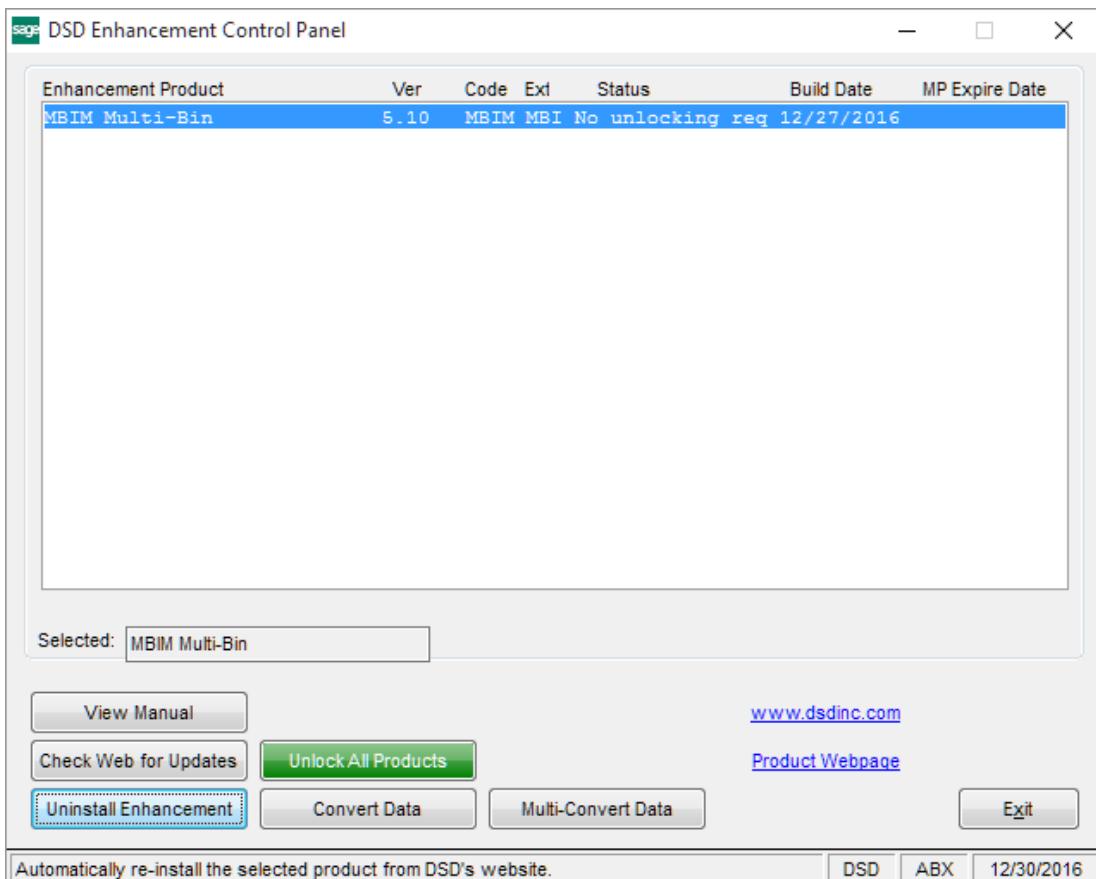
| Comment line 5 | C | 452 | 35 | Pick Ticket Message #3 |
|------------------------------|------|-------|--------|---|
| Comment line 6 | C | 487 | 35 | Pick Ticket Message #4 |
| Miscellaneous 1 | C | 522 | 30 | Miscellaneous data field - TBD |
| Wave | C | 552 | 5 | Wave |
| Sequence | C | 557 | 5 | Sequence |
| Chain Vendor Number | C | 562 | 10 | Chain Vendor Number - Walgreens etc. |
| Chain Store Number | C | 572 | 10 | Chain Store Number - Walgreens etc. |
| Cust Use Header field | C | 582 | 30 | Field for customer use |
| AllowOverage | C | 612 | 1 | Y/N to Allow overages for items on this Unit Of Work. Default to N |
| Reserved Header | | 613 | 27 | Reserved for future use |
| Last position in record | | 640 | | Populate with X |
| Field Name | Type | Start | Length | Description |
| Record designator | C | 1 | 1 | “D” for detail |
| Record Type | C | 2 | 1 | “P” for Primary Item |
| Unit of Work Sequence Number | N | 3 | 6 | Sequential Line Numbers 000001, 000002, etc |
| UPC | C | 9 | 20 | If the line.UnitofMeasure is <> “CASE” assign CI_Item.UDF_INNER_PK_UPC, else assign the General alias item number |
| Description | C | 29 | 30 | Description for the Item |
| Pick quantity | N | 59 | 4 | Quantity required for line item |
| Picking Bin | C | 63 | 10 | Im.ItemWarehouse.BinLocation Item Picking Location - Can be NA |
| Item Number | C | 73 | 10 | Wholesaler Item Number |
| Mfg item number | C | 83 | 20 | SO_SalesOrderDetail.UDF_MFG_ITEM |
| Pack | C | 103 | 7 | SO_SalesOrderDetail.UDF_PACK |
| Size | C | 110 | 7 | SO_SalesOrderDetail.UDF_SIZE |
| UOM | C | 117 | 7 | Unit of Measure |
| Vendor Number | C | 124 | 10 | CI_Item.PrimaryAPDivisionNo |
| Vendor Name | C | 134 | 30 | CI_Item.PrimaryVendorNo |
| Slot | C | 164 | 10 | CI_Item.UDF_SLOT |
| Kit Number | C | 174 | 10 | Master item number for component deal |
| Hazmat Flag | C | 184 | 1 | Y/N |
| Package Type | C | 185 | 1 | Code to signal start new box due to contents, cleaners, etc |

| | | | | |
|---------------------------|---|-----|----|---|
| Expiration Date | C | 186 | 10 | YYYYMMDD or NNN (Number of days) Assign the date based on the Current System Date + ci_item.UDF_Self_Life (number of days) |
| Catch Weight Item | C | 196 | 1 | SO_SalesOrderDetail.UDF_CWITEM Y/N |
| Lot Control Item | C | 197 | 1 | SO_SalesOrderDetail.UDF_LCITEM Y/N |
| Full Case Label Item | C | 198 | 1 | SO_SalesOrderDetail.UDF_FCITEM Y/N |
| QOH | N | 199 | 5 | Quantity on Hand |
| Last Receive Date | D | 204 | 10 | CI_Item.LastReceiptDate Last received date |
| Retail Price | N | 214 | 5 | CI_Item.SuggestedRetailPrice Customer Retail - format xxx.xx, implied decimal |
| Retail UPC | C | 219 | 20 | SO_SalesOrderDetail.UDF_RETUPC Retail UPC |
| Tax Code 1 | C | 239 | 4 | Tax Code 1 |
| Tax Code 2 | C | 243 | 4 | Tax Code 2 |
| Retail Price Stickers | C | 247 | 1 | Y/N Flag to print RPS |
| Color Code | C | 248 | 1 | SO_SalesOrderDetail.UDF_CCODE If the UDF is blank and the line.UnitofMeasure is <> "CASE" assign "R" to this position |
| UPC capture | C | 249 | 1 | Y/N to request UPC Capture if feature enabled in pick area |
| Misc Future Flag | C | 250 | 1 | |
| Message 1 | C | 251 | 35 | Line message 1 |
| Message 2 | C | 286 | 35 | Line message 2 |
| Message 3 | C | 321 | 35 | Line Message 3 |
| Price Tag Msg 1 | C | 356 | 6 | Price Tag Msg on top line |
| Price Tag Msg 2 | C | 362 | 18 | Price Tag Msg on bottom line - Format B only |
| Catch Weight Min (Legacy) | N | 380 | 2 | Catch Weight Minimum value (Legacy) |
| Catch Weight Max (Legacy) | N | 382 | 2 | Catch Weight Maximum value (Legacy) |
| Misc 1 | C | 384 | 7 | Misc 1 |
| Misc 2 | C | 391 | 35 | Misc 2 |
| Cust Use Detail Field | C | 426 | 35 | Field for customer use |
| Catch Weight Min | N | 461 | 6 | SO_SalesOrderDetail.UDF_CWMIN Catch Weight Minimum value - format xxxx.xx, implied decimal |
| Catch Weight Max | N | 467 | 6 | SO_SalesOrderDetail.UDF_CWMAX Catch Weight Maximum value - format xxxx.xx, implied decimal |

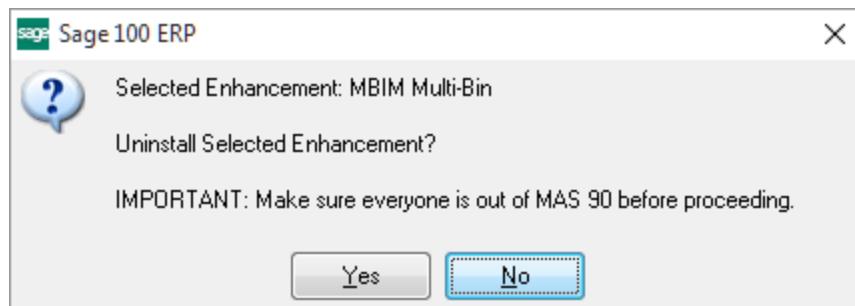
| Unit Weight | N | 473 | 6 | Unit Weight to use for packing lists and printed labels - format xxxx.xx, implied decimal |
|------------------------------|------|-------|--------|---|
| Collect Serial Number | C | 479 | 1 | Y/N |
| Force GS-1 Parsing | C | 480 | 1 | SO_SalesOrderDetail.UDF_FGS1 Y/N default is Y |
| Item Description (Extended) | C | 481 | 60 | Extended item description |
| COOL Code Type | C | 541 | 2 | 2 character COOL code collection type. Leave blank if not used. |
| Pick quantity - large Qty | N | 543 | 8 | Quantity required for line item (NEW) |
| Reserved | C | 551 | 3 | Reserved for future use |
| QOH | N | 554 | 8 | Quantity on Hand (NEW) |
| Level | C | 562 | 1 | Level 1, 2, 3, n |
| Case UPC | C | 563 | 20 | Full case UPC |
| Pick Area | C | 583 | 10 | Pick Area |
| Pick Area Description | C | 593 | 20 | Pick Area Description |
| Temperature Capture | C | 613 | 1 | SO_SalesOrderDetail.UDF_TEMPCAP Y to capture item's temperature at pick time |
| Reserved Detail | C | 614 | 26 | Reserved for future use |
| Last position in record | | 640 | | Populate with X |
| Field Name | Type | Start | Length | Description |
| Record designator | C | 1 | 1 | "U" for Additional UPC |
| Record Type | C | 2 | 1 | "P" for Primary Item, "S" for Substitute Item - same as associated detail record |
| Unit of Work Sequence Number | N | 3 | 6 | Picking Sequence - same as associated detail record |
| UPC | C | 9 | 40 | UPC number for line item |
| Description | C | 49 | 30 | Description for Additional UPC |
| Last position in record | | 79 | | |

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.



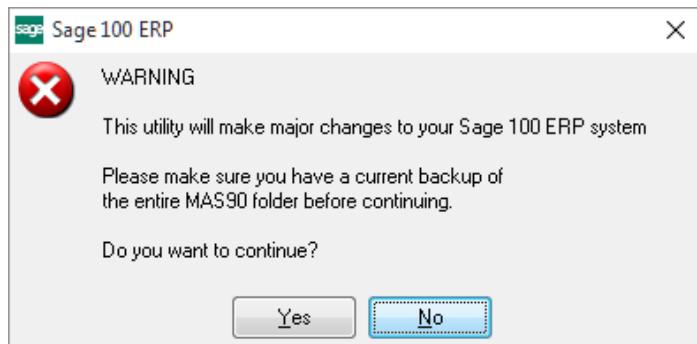
When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.

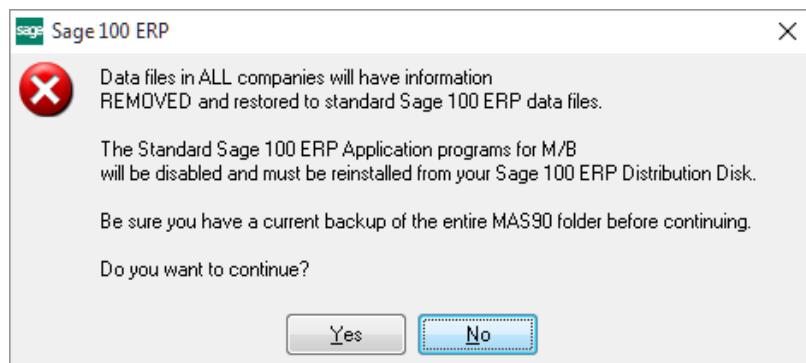
After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

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).