



DSD Business Systems

Sage 100 Enhancements

IT00

Internet Sales

IT-1000

Version 5.30



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Internet Sales User's Manual
Version 5.30

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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*

IT00 Internet Sales:

<http://www.dsdinc.com/enh/pages/IT00.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.

Internet Sales Features

This DSD Extended Solution allows salespeople access to customer data via the e-Business Manager module. Orders can be placed while viewing costs, adding line item discounts, and flagging items for drop-shipment. Access is limited to customers assigned to a specific salesperson.

The E-business Manager .order applet must be installed in order for this Extended Solution to function.

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
I/T	Y	5.30
I/W	Y	5.30
A/R	Y	5.30

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.

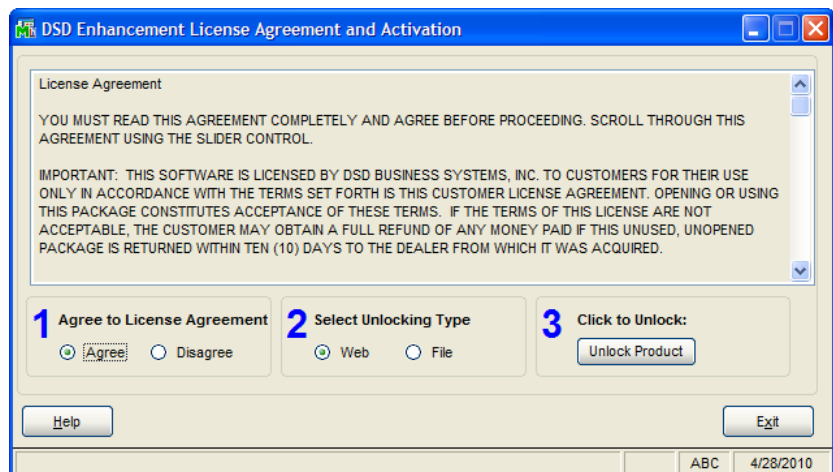
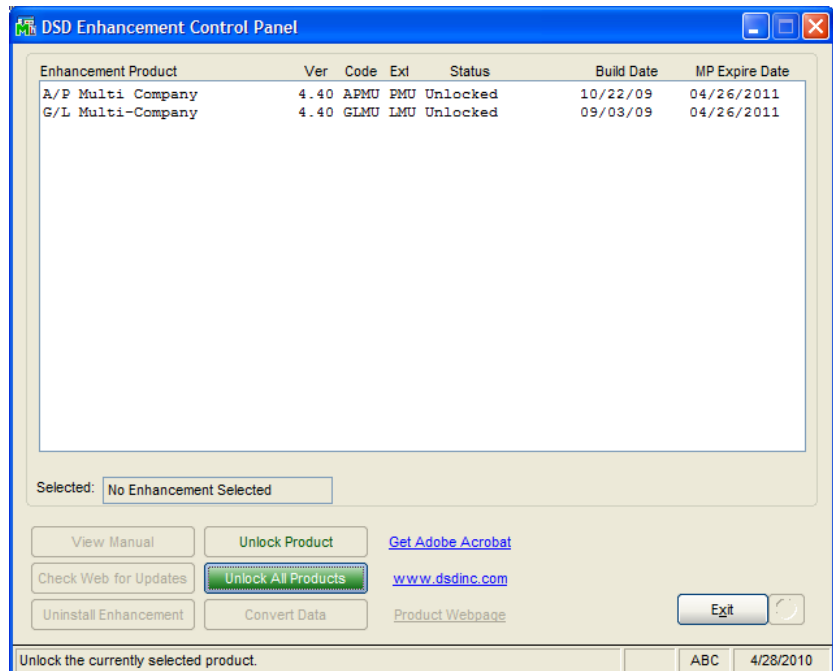
The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired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

MAS90WEB

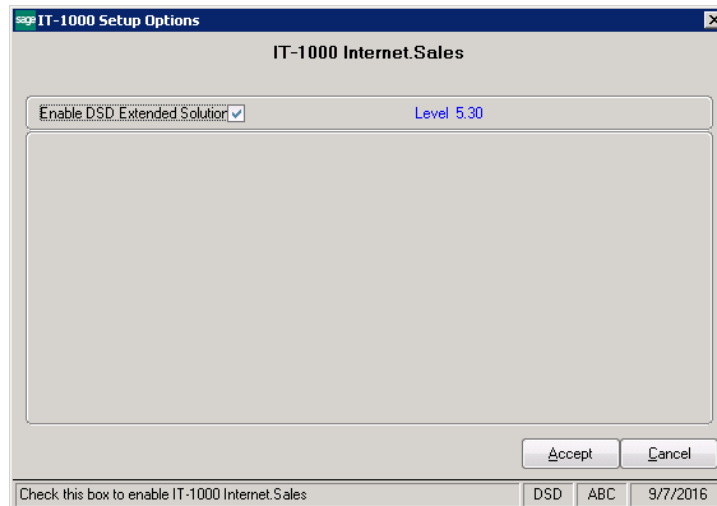
After installation, you will need to copy the following files from the MAS90\Links folder in the Sage 100 installation into the Webeng\Links folder on the web server:

AR_LevelConversion.pvc	IT_LevelConversion.pvc
AR_SalespersonListing_rpt.pvc	IT_ShoppingCartDetail_bus.pvc
AR_Salesperson_bus.pvc	IT_ShoppingCart_bus.pvc
AR_Salesperson_ui.pvc	IT_ShoppingCart_upd.pvc
IT_EBMUserIDLListing_rpt.pvc	IT_UIDCustomerChange_bus.pvc
IT_EBMUserIDLListing_ui.pvc	IT_WebMenu_bus.pvc
IT_EBusinessManagerUserID_bus.pvc	IT_WebMenu_ui.pvc
IT_EBusinessManagerUserID_ui.pvc	

Copy IW programs to IS Server: Copy the programs in the “IW” directory into the “IW” directory in the “wwwroot” directory of the Sage 100 **e-Business Manager server**. *This step is required to place the proper programs on the server. As some businesses have a server site that is remotely hosted, this step may require you to FTP the “IW” programs to the server.*

Setup

Upon completion of software installation, you will need to access Setup Options from the e-Business Manager 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 must visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

Role Maintenance

The following Task has been added to e-Business Manager, Setup Options:

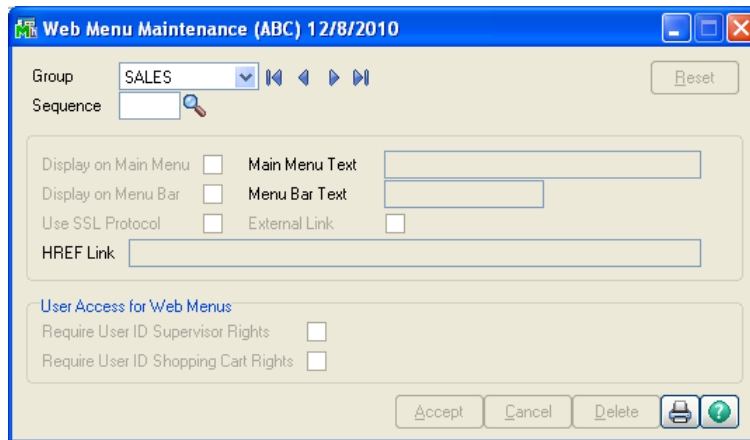
- Extended Solutions Setup

Please review your security setup in Role Maintenance and make appropriate changes.

Section D: System Operations

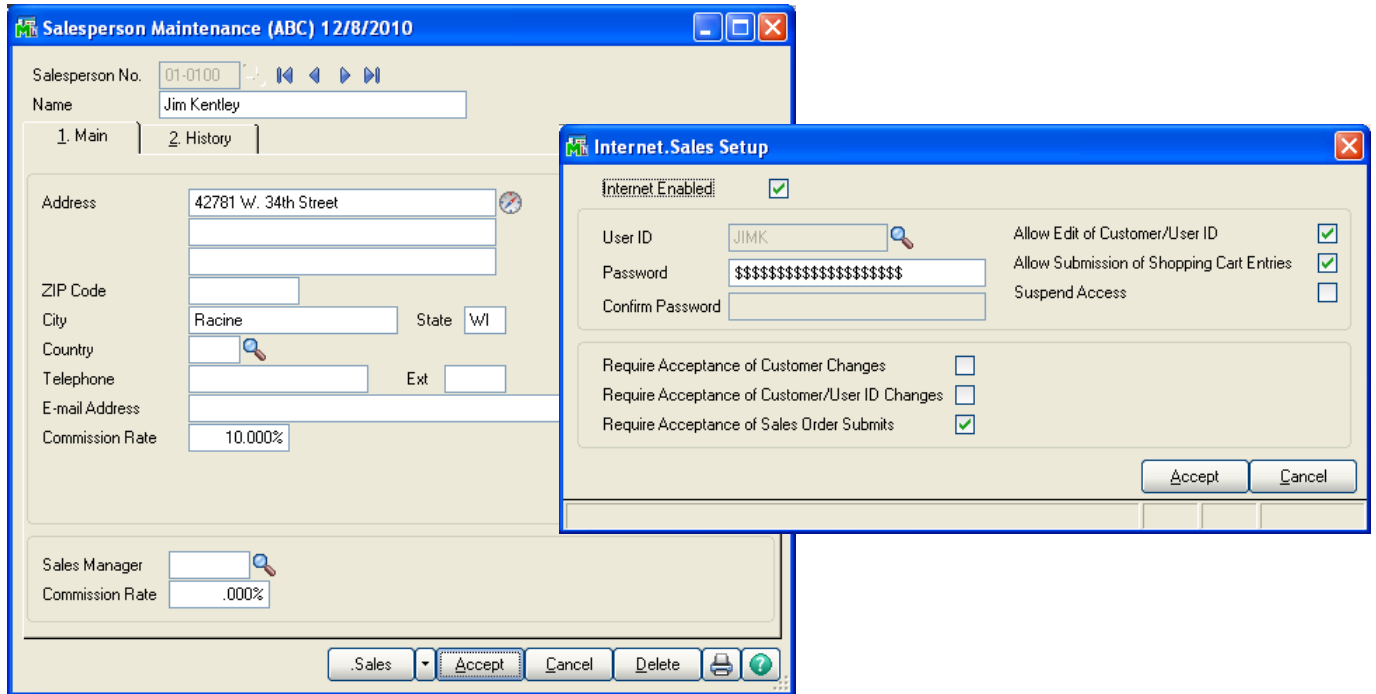
Web Menu Maintenance

A new Group called 'Sales' has been added. It is similar to the .order Group MAIN. You will need to configure this for what is appropriate for your salespeople.



A/R Salesperson Maintenance

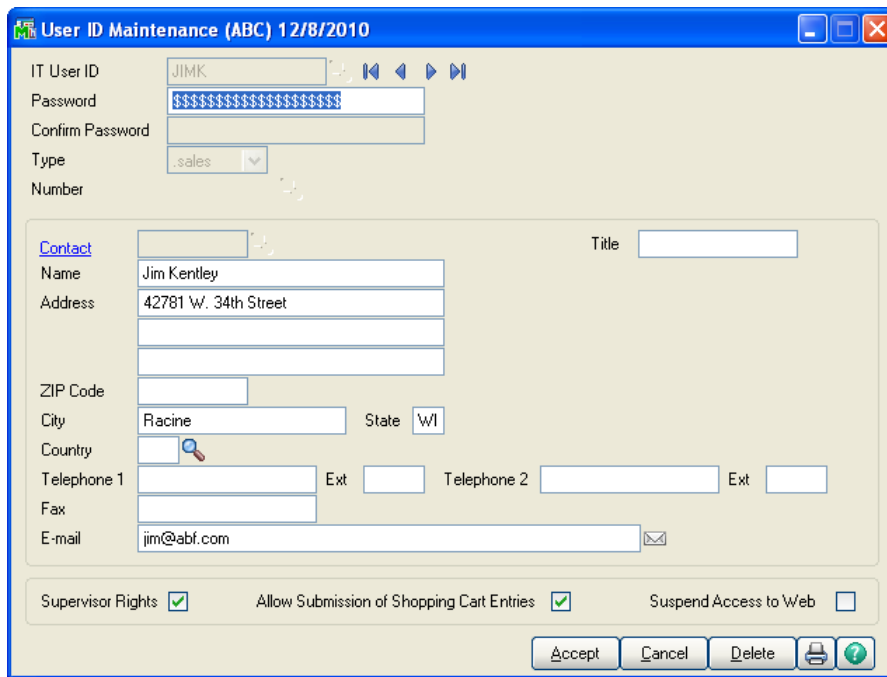
Salesperson Maintenance has been modified with a 'Sales' button. Click this to access the Internet.Sales Setup screen.



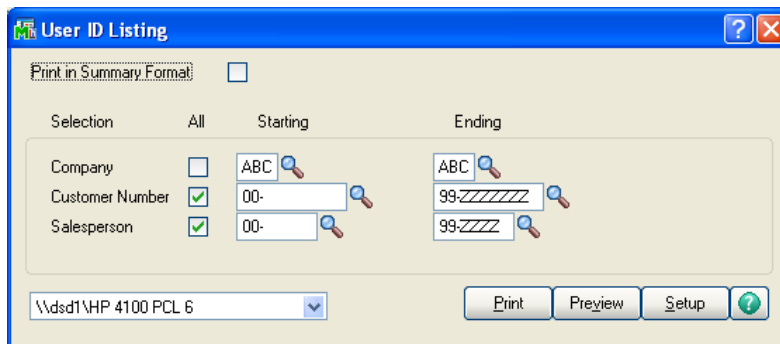
Establish the User ID and password. The option to 'Allow Edit of Customer /User ID' is the same as 'Supervisor Rights' in EBM User ID Maintenance. 'Suspend Access' is the same as 'Suspend Access to Web' and 'Allow Submission of Shopping Cart Entries' is tied to the same named option in User ID Maintenance. The salesperson options to require acceptance of changes and submits will override whatever has been established for the customer. Therefore if the customer option to require sales order submits is checked, but not for the salesperson, then no acceptance will be required when this salesperson submits a shopping cart for this customer.

User ID Maintenance

Salesperson logins can also be maintained in EBM User ID Maintenance. The Type field has been modified with .sales in the drop box.

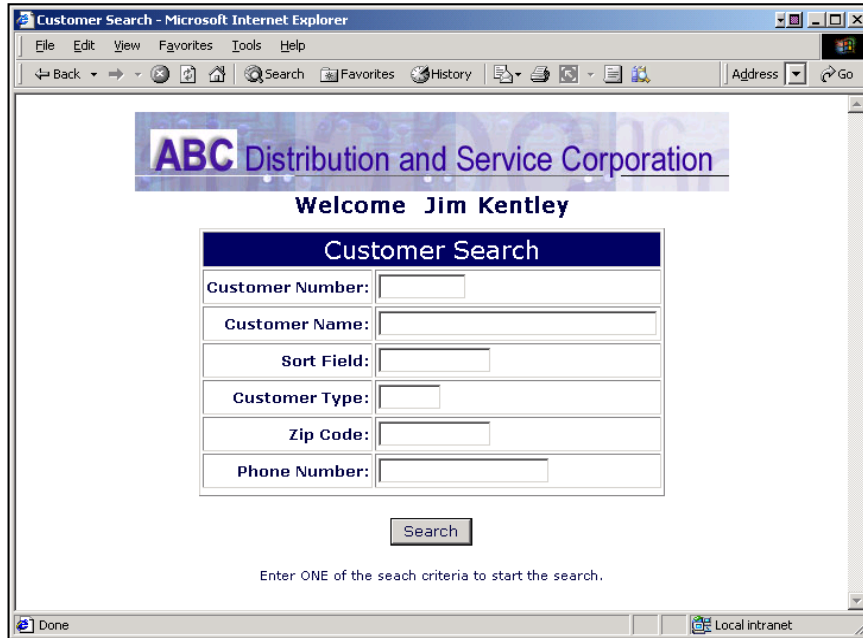


A selection range by Salesperson Number has been added to the User ID listing.



From the Internet

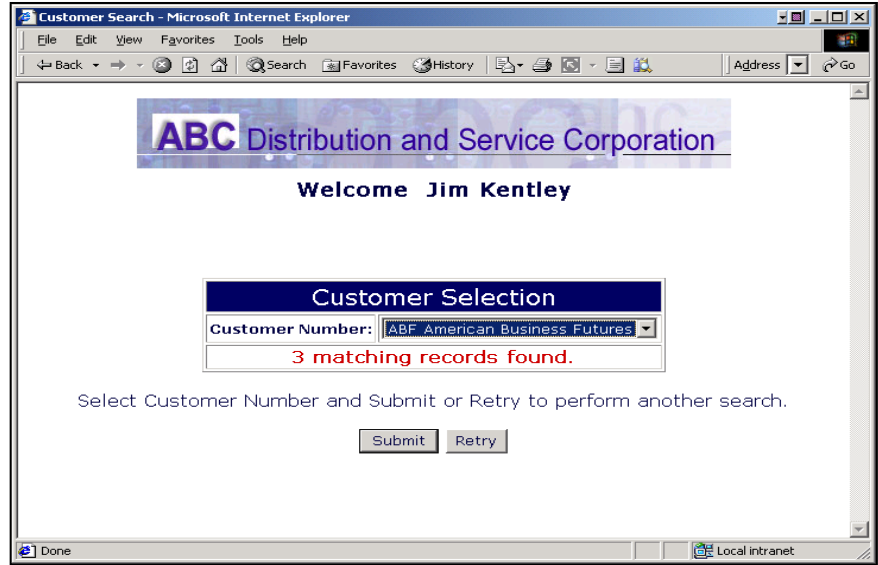
After you have logged on to e-Business Manager as a salesperson, you will be presented with the Customer Search form. Specify the Customer Number, Customer Name, Sort Field, Customer Type, Zip Code, or Phone Number.



The screenshot shows a web browser window titled "Customer Search - Microsoft Internet Explorer". The browser's address bar is empty, and the status bar at the bottom indicates "Done" and "Local intranet". The main content area displays the logo for "ABC Distribution and Service Corporation" in a blue banner. Below the logo, it says "Welcome Jim Kentley". The central focus is the "Customer Search" form, which has a dark blue header. The form contains six input fields, each with a label to its left: "Customer Number:", "Customer Name:", "Sort Field:", "Customer Type:", "Zip Code:", and "Phone Number:". Below these fields is a "Search" button. At the bottom of the form area, there is a small instruction: "Enter ONE of the search criteria to start the search."

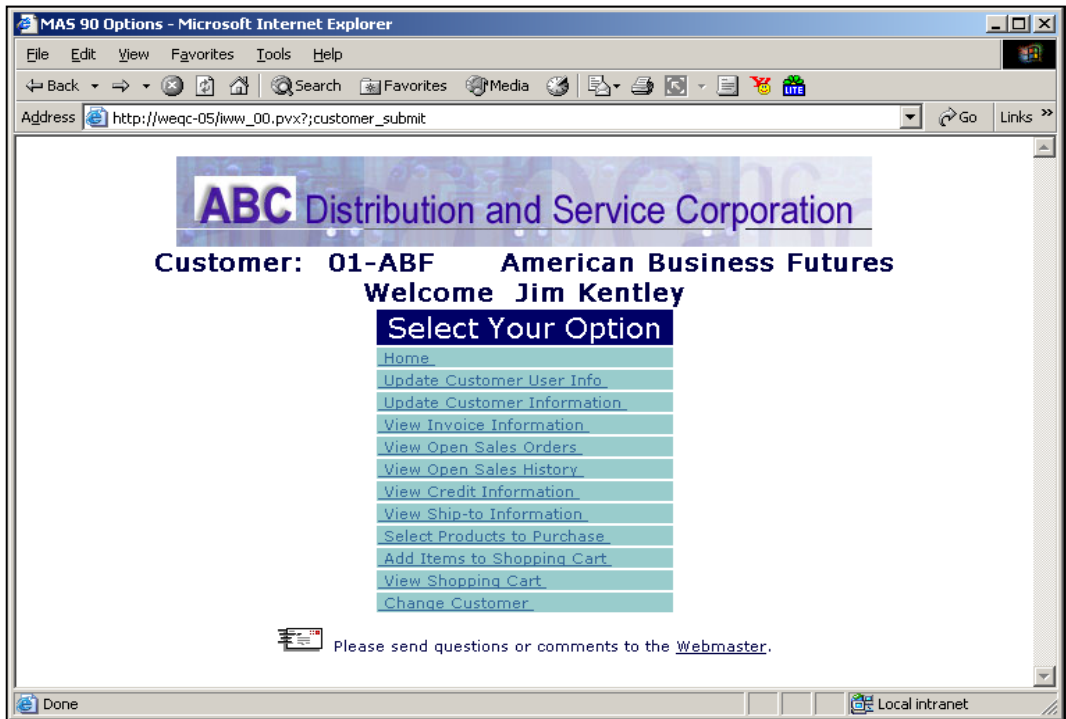
Enter search criteria in any of these fields (full or partial) and click the Search button. If multiple criteria are entered, then it uses the data in the first search field with non-blank value*.

** Only one Search on a field is performed at a time. Therefore, if you entered 'Accounting' in the customer name field and '(708)' in the phone number field, the results will **not** be all customers who match both data fields. It will be all customers who match 'Accounting' as the beginning characters of their customer name, or if it finds none, then all customers whose phone number begins (708).*



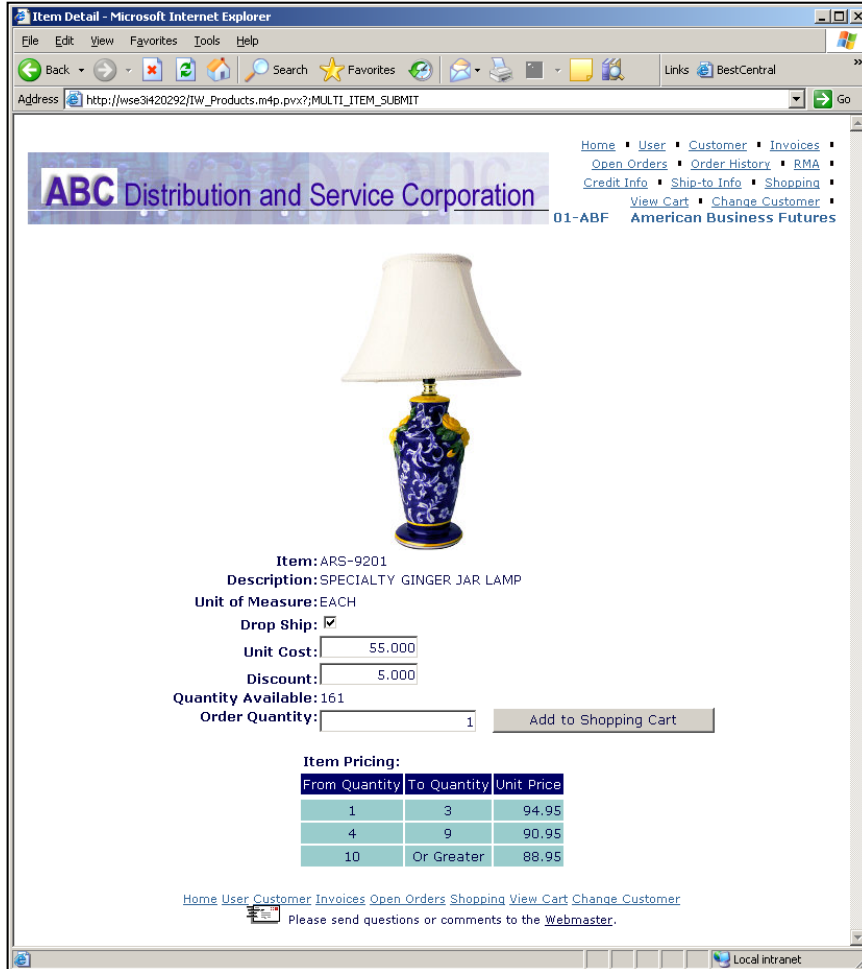
If only one match is found, it will select that Customer. If more than one match is found, you will need to select the appropriate value from the Customer Number drop box and click the Submit button or press the Retry button to enter in new search criteria.

Once a valid Customer Number is selected, you will proceed to the Main Options screen. The Customer Number and Name is displayed above the Options Menu. The Change Customer option has been added to the menu; use this to select a different Customer Number. On all of the internet HTML forms, the name of the current customer will be displayed.

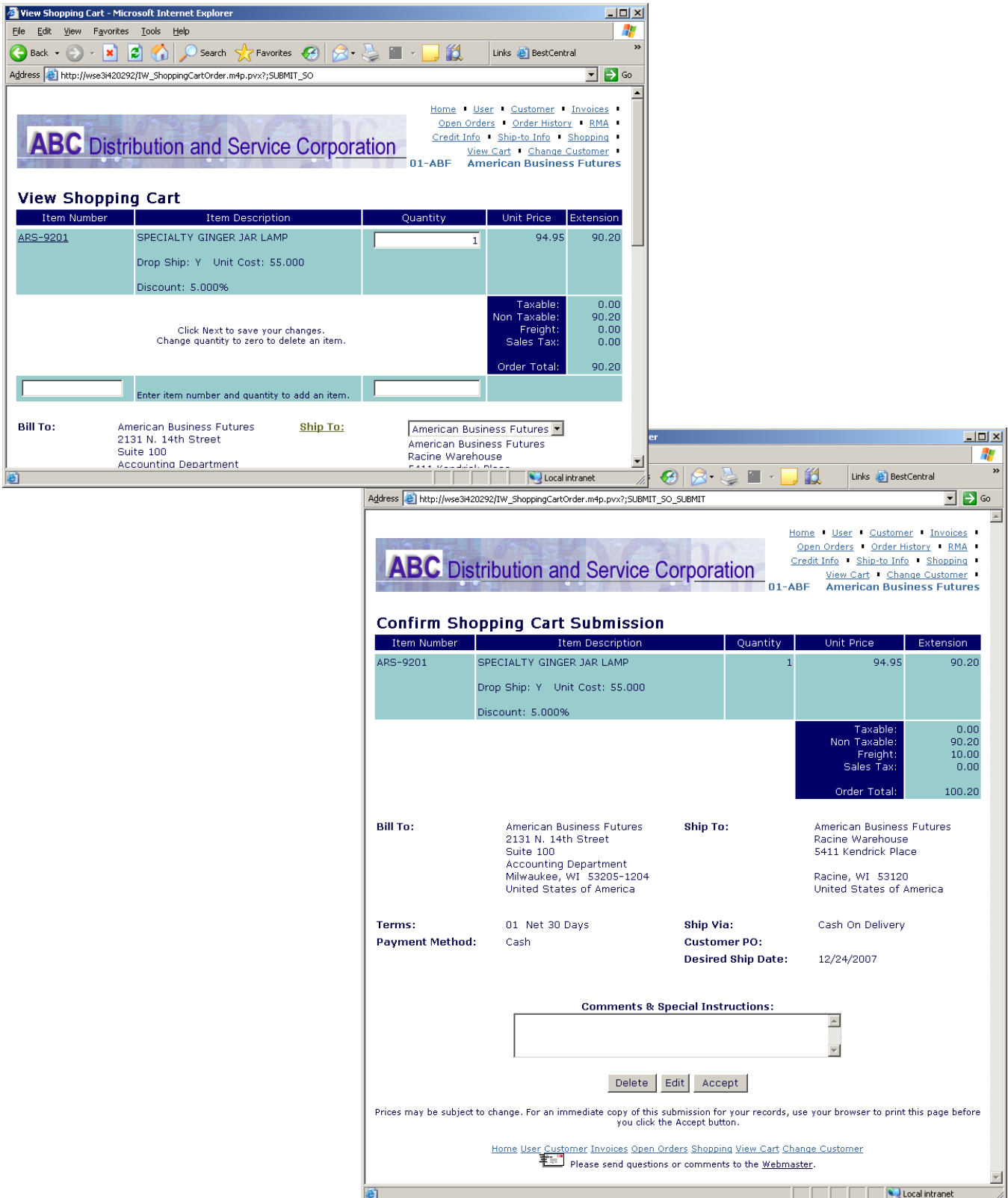


Item Entry

From Select Products to Purchase, then drill into the item detail the customer wishes to purchase. This form has been modified to display the Customer Number & Name at the top of the form. It also contains a Drop Ship field, a Unit Cost field and a Discount field. Unit Cost should only be filled in if you selected Drop Ship. It will default to zero and can be overridden. If you fill in a value when Drop Ship is unchecked, it will not update to the Sales Order. Discount should be entered as a percent like Sales Order line entry.



The View Shopping Cart and Confirm Shopping Cart forms will then display these additional fields under each item; Unit Cost will only display if Drop Ship is selected. Note the line extension reflects the application of the discount.



Shopping Cart Submittal

If Drop Ship was checked on a line in the shopping cart, then the subsequent sales order line will be set to Drop Ship. The Unit Cost will be set to the shopping cart's unit cost value.

If the Sales Order option to Allow Discount Rate by Line is checked, the Discount rate on the shopping cart line will transfer to the Discount Rate of the sales order line.

ODBC Dictionary

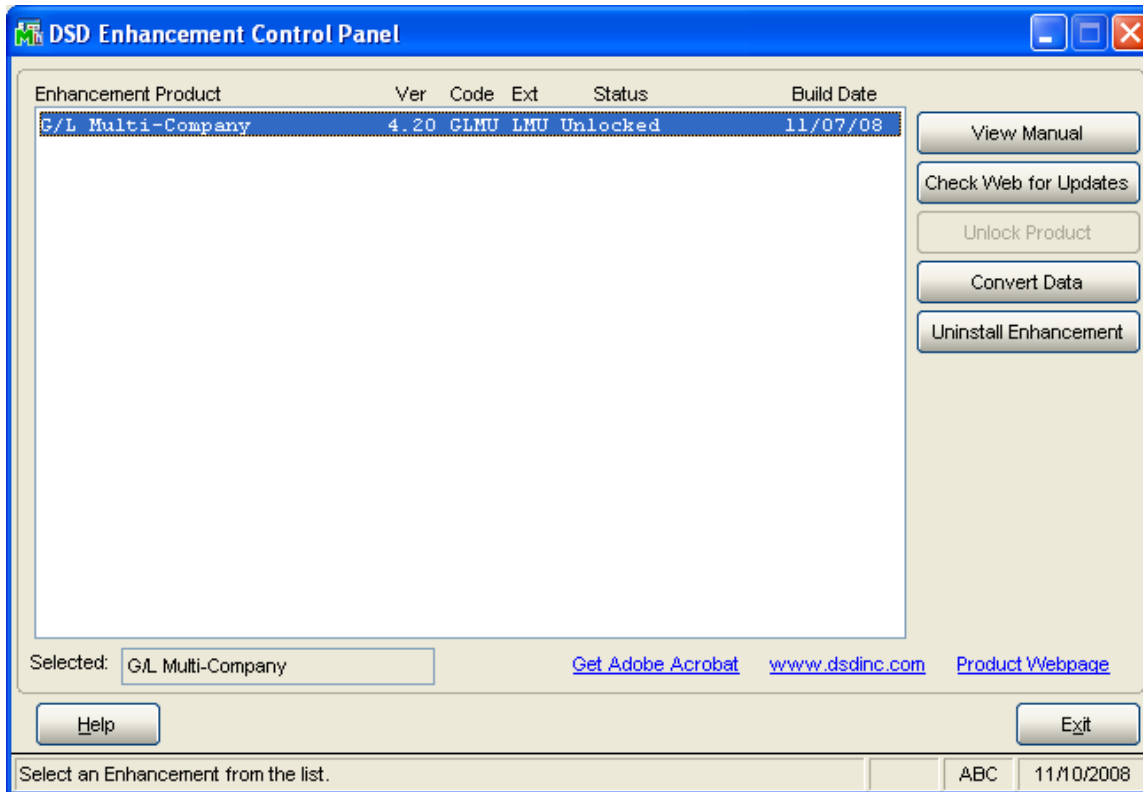
The files listed below have been added or changed in the ODBC Dictionaries by this Extended Solution for Crystal Reports purposes.

<i>File:</i>	<i>Field:</i>
AR_Salesperson:	EBMEnabled_001\$ RequireAcceptOfCustChange_001\$ RequireAcceptOfUIDChange_001\$ RequireAcceptOfSOSubmits_001\$
AR_SalespersonListingWrk:	EBMEnabled_001\$ RequireAcceptOfCustChange_001\$ RequireAcceptOfUIDChange_001\$ RequireAcceptOfSOSubmits_001\$ EBMUserID_001\$ SupervisorRights_001\$ AllowSubOfShoppingCart_001\$ SuspendAccess_001\$
SY_EBusinessManagerUserID:	SalespersonDivisionNo_001\$ SalespersonNo_001\$
IT_UserIDListingWrk:	SalespersonDivisionNo_001\$ SalespersonNo_001\$
IT_ShoppingCartItemsSelected:	DropShip_001\$ UnitCost_001 LineDiscountPercent_001
IT_ShoppingCartDetail:	DropShip_001\$ UnitCost_001 LineDiscountPercent_001
DropShip_001\$	IT_ShoppingCartAutoLogDtl: UnitCost_001 LineDiscountPercent_001

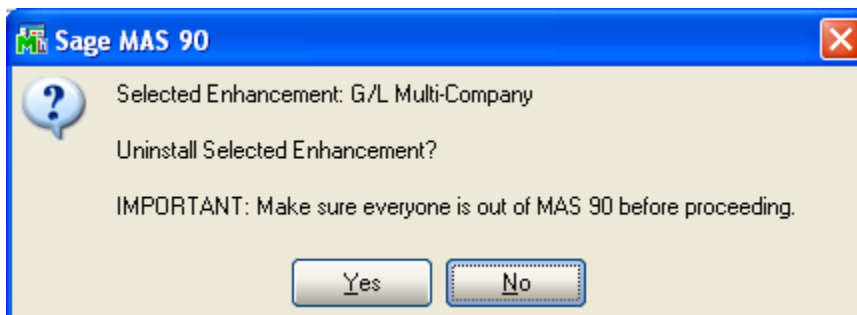
Be aware that the ODBC Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

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.

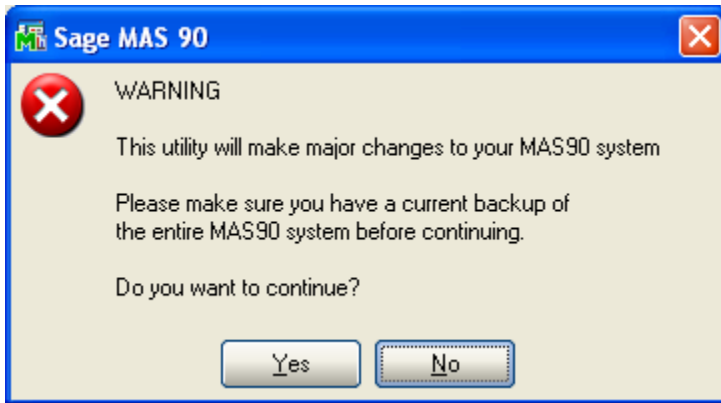


When accessing the **DSD Utility Suite**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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

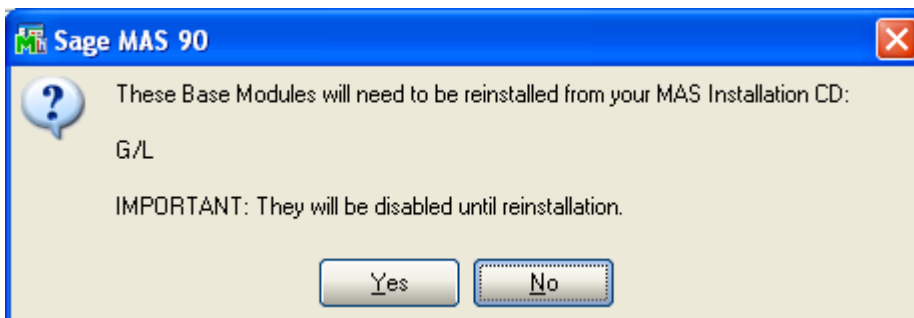
The following message box will appear, to remind you that a complete backup of your entire MAS90 system should be completed prior to uninstalling a DSD product.



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.

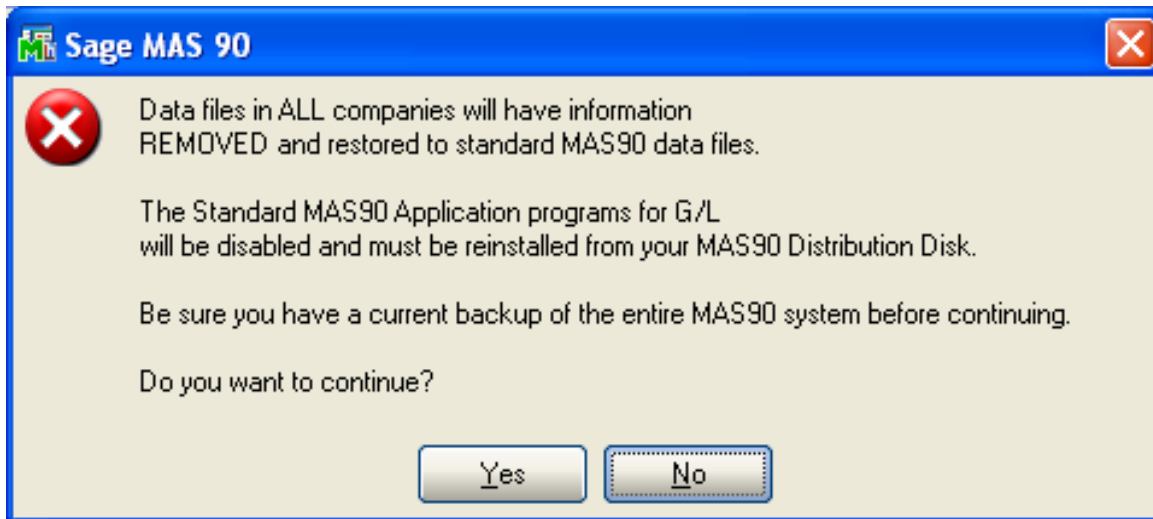


Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

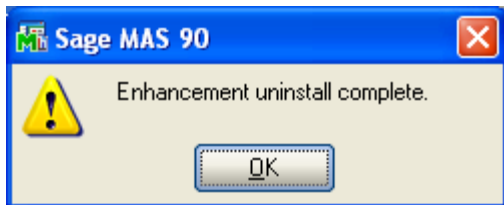
The following message box will appear, displaying the final warning message.

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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