# DSD Business Systems

**Sage 100 Enhancements**

# PORR

# ProCat's "ReceiveRight" Integration

**Version 7.50**

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P/O ProCat's 'ReceiveRight' User's Manual
Version 7.50

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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*

PORR S/O Ship To Split Commissions:

**http://www.dsdinc.com/enh/pages/PORR.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.*

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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.

## *P/O ReceiveRight Features*

This DSD enhancement to P/O Purchase Order Entry is modified to generate export files formatted for ProCat's "ReceiveRight".


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# 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 |
|---|---|---|
| P/O | **Y** | 7.50 |

## *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.

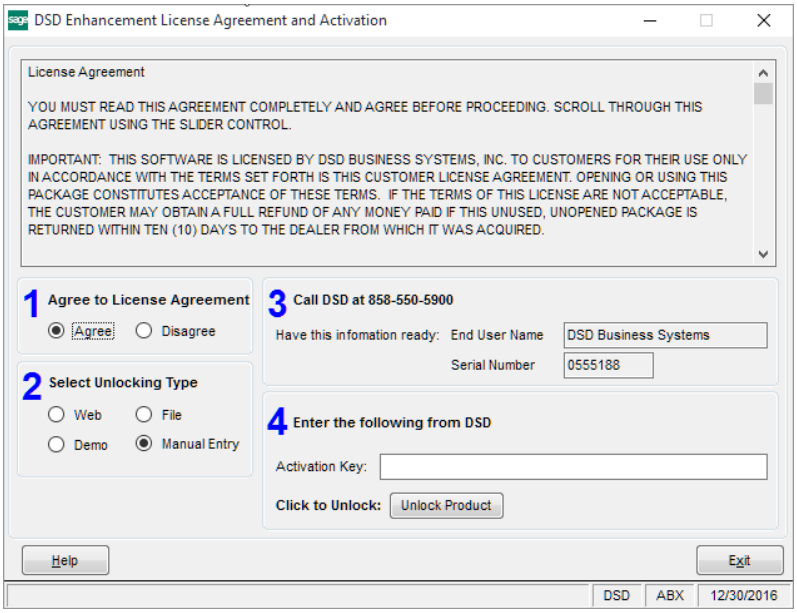
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**Web Unlock:** If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt 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.

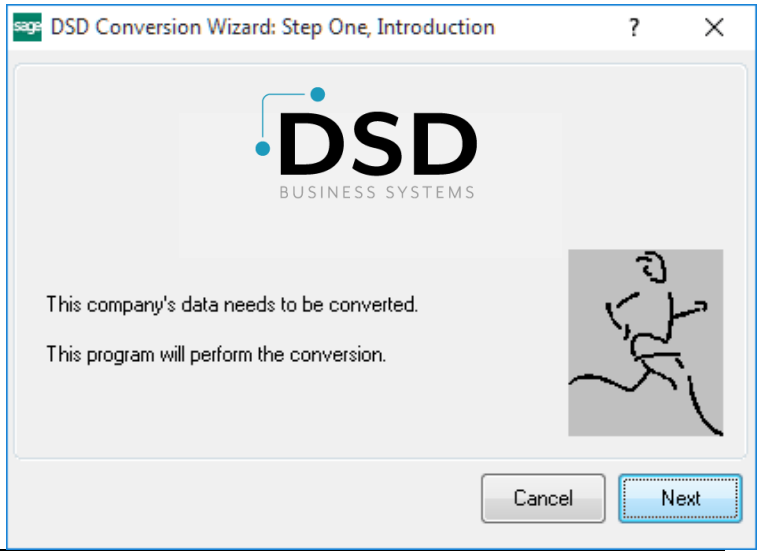
- *Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.*




**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.*

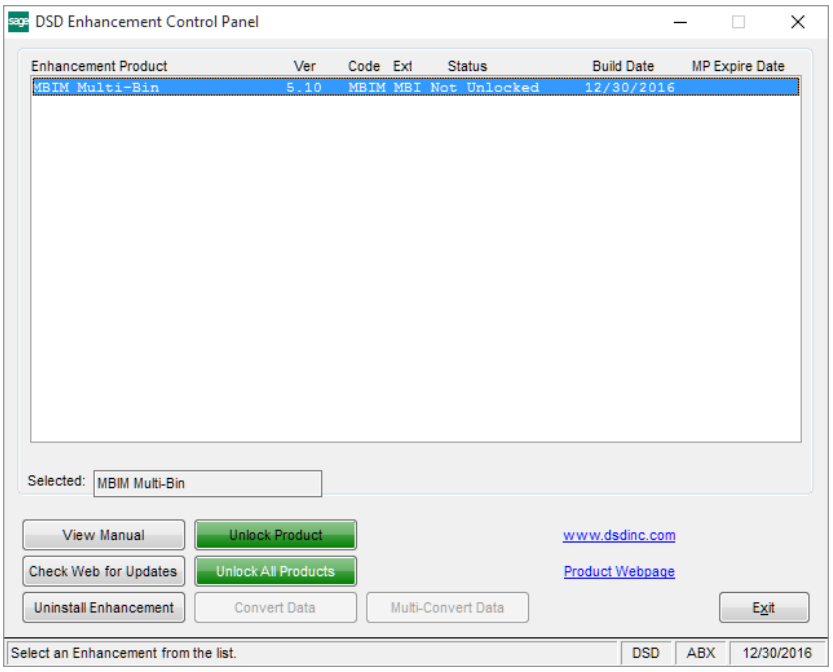




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## *DSD Enhancement Control Panel*

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 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.*

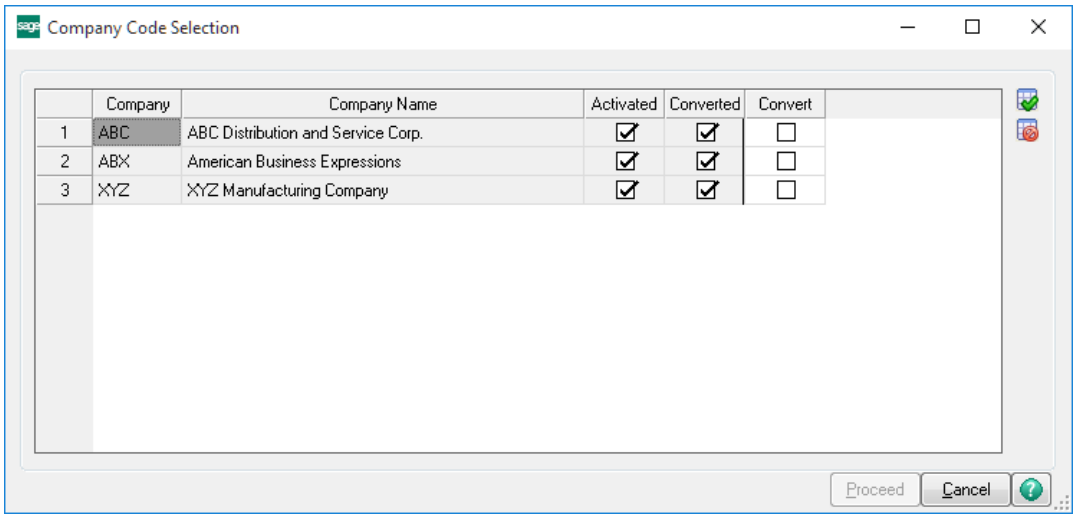
**Unlock Product:** This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

**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.)*




**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)


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## Section C: Setup

UDFs to be created:

Table Name: PO_PurchaseOrderHeader
Field Names:

1. UDF_SENT_TO_RR, Checkbox
2. UDF_SENT_TO_RR_DATE, (10) Date
3. UDF_SENT_TO_RR_TIME, String (8)
4. UDF_REC_FROM_RR, Checkbox
5. UDF_REC_FROM_RR_DATE, (10) Date
6. UDF_REC_FROM_RR_TIME, String (8)

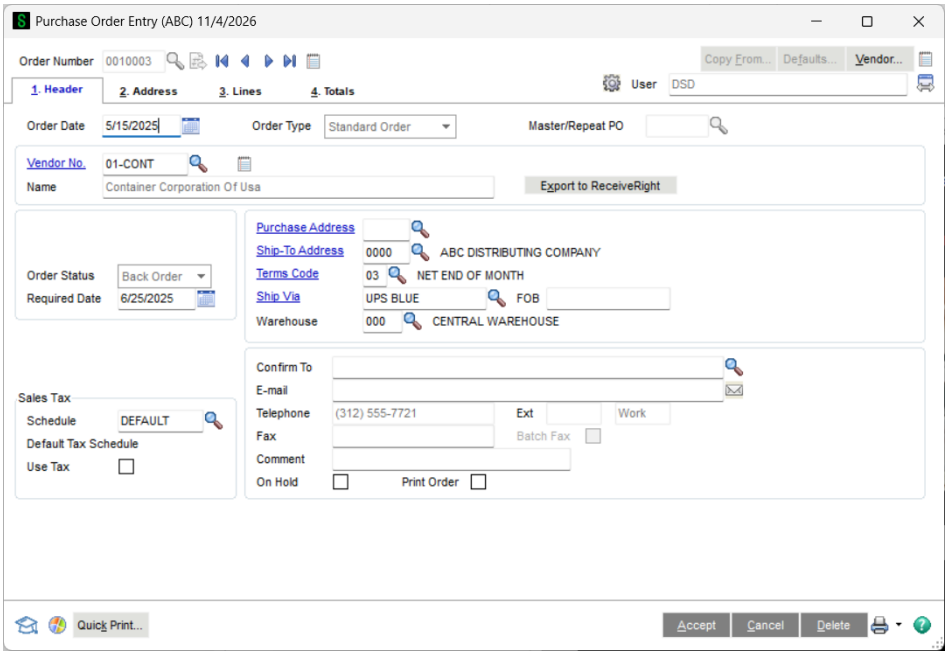
## Section D: System Operations

The export files will be created in the following location: …\MAS90\MAS_XXX\POXXX\Export

The naming convention for the file is as follows: Purchase Order No + ".imp"

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

A new button "Export to ReceiveRight" has been added to the Header tab of Purchase Order Entry.




Pressing this button will export the selected Purchase Order. Upon successful completion of the export the following Purchase Order Header UDF values will be updated as follows.

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i. UDF_SENT_TO_RR will be checked
ii. UDF_SENT_TO_RR_DATE will be set to the Sage100 System Date
iii. UDF_SENT_TO_RR_TIME will be set to the Sage100 System Time

Purchase Order Entry:

If the UDF_SENT_TO_RR is checked, the Purchase Order's UI access will be set to "View Only"
Note: The field control will be disabled via Custom Office

| Field Name | Type | Start | Len | Sage 100 PO Source | Description |
|---|---|---|---|---|---|
| Record designator | C | 1 | 1 | (Literal "H") | "H" for header |
| PO ID # - must be unique | C | 2 | 16 | PO_PurchaseOrderHeader.PurchaseOrderNo | Must match filename without .imp. May be PO number or other reference. |
| Vendor Name | C | 18 | 30 | PO_PurchaseOrderHeader.PurchaseName | Name of vendor for PO ID # |
| Vendor Number | C | 48 | 10 | PO_PurchaseOrderHeader.VendorNo | Number of Vendor for PO ID # |
| Jurisdiction | C | 58 | 14 | (Leave blank) | Leave blank |
| Number of Detail Records | N | 72 | 6 | (Calculated - count of detail lines) | Total number of line items - validates file integrity |
| PO Number | C | 78 | 16 | PO_PurchaseOrderHeader.PurchaseOrderNo | Actual PO Number for this PO ID # |
| Order Number | C | 94 | 16 | (Leave blank - future use) | Leave Blank - future reference field |
| Memo Number | C | 110 | 16 | (Leave blank - future use) | Leave Blank - future reference field |
| Route Name | C | 126 | 20 | (Leave blank - future use) | Can be "NA" if no data available |
| Route Number | C | 146 | 5 | (Leave blank - future use) | Can be "NA" if no data available |
| Stop Number | C | 151 | 5 | (Leave blank - future use) | Can be "1" if no data available |
| Street Address 1 | C | 156 | 25 | (Leave blank - future use) | Leave Blank - future reference field |
| Street Address 2 | C | 181 | 25 | (Leave blank - future use) | Leave Blank - future reference field |
| City | C | 206 | 25 | (Leave blank - future use) | Leave Blank - future reference field |
| State | C | 231 | 2 | (Leave blank - future use) | Leave Blank - future reference field |
| Zip Code | C | 233 | 10 | (Leave blank - future use) | Leave Blank - future reference field |
| Phone Number | C | 243 | 20 | (Leave blank - future use) | Leave Blank - future reference field |
| Delivery Date | C | 263 | 10 | PO_PurchaseOrderHeader.RequiredExpireDate | PO Receive Date, format: YYYYMMDD |
| Door | C | 273 | 3 | (Leave blank - future use) | Receiving Door Number - Optional |
| Pick Area | C | 276 | 10 | PO_PurchaseOrderHeader.VendorNo | Always populate with "REC" |
| Pick Area Description | C | 286 | 20 | PO_PurchaseOrderHeader.PurchaseName | Always populate with "RECEIVING" |
| Number of Cigarette Ctns | N | 306 | 5 | (Future use) | Number of Cig Cartons on PO - Future Use |
| Print Packing List | C | 311 | 1 | (Default "N") | Y or N flag - Default = N |
| Label message #1 | C | 312 | 35 | (Leave blank - future use) | Label message #1 |
| Label message #2 | C | 347 | 35 | (Leave blank - future use) | Label message #2 |
| PO Message #1 | C | 382 | 35 | (Leave blank) | PO Message #1 |
| PO Message #2 | C | 417 | 35 | (Leave blank) | PO Message #2 |
| PO Message #3 | C | 452 | 35 | (Leave blank - future use) | PO Message #3 |
| PO Message #4 | C | 487 | 35 | (Leave blank - future use) | PO Message #4 |
| Miscellaneous | C | 522 | 30 | (Leave blank - future use) | Miscellaneous data field - TBD |
| Wave | C | 552 | 5 | (Leave blank - future use) | Wave |
| Sequence | C | 557 | 5 | (Leave blank - future use) | Sequence |
| Chain Vendor Number | C | 562 | 10 | (Future use) | Chain Vendor Number - Future Use |
| Chain Store Number | C | 572 | 10 | (Future use) | Chain Store Number - Future Use |
| Cust Use Header field | C | 582 | 30 | (Leave blank - future use) | Pass-through field for customer use |
| AllowOverage | C | 612 | 1 | (Default "Y") | Y/N to allow overages for items on this PO |
| Reserved Header | | 613 | 387 | (Blank - future use) | Reserved for future use |


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| Field Name | Type | Start | Len | Sage 100 PO Source | Description |
|---|---|---|---|---|---|
| Record designator | C | 1 | 1 | (Literal "D") | "D" for detail |
| Record Type | C | 2 | 1 | (Literal "P" or "S") | "P" for Primary, "S" for Substitute |
| PO Sequence Number | N | 3 | 6 | PO_PurchaseOrderDetail.SequenceNo | Line Sequence Number (000001, 000002, etc.) |
| Case UPC | C | 9 | 20 | PO_PurchaseOrderDetail.UDF_CASE_UPC | UPC number - Case level. If UOM <> CASE, use alias. |
| Case Item Description | C | 29 | 30 | PO_PurchaseOrderDetail.ItemCodeDesc | Description for UPC |
| PO Order qty - Legacy | N | 59 | 4 | (Leave blank) | Use position 543 for PO quantity |
| Picking Bin | C | 63 | 10 | Im.ItemWarehouse.BinLocation | Item Picking/Receiving Location |
| Item Number | C | 73 | 10 | PO_PurchaseOrderDetail.ItemCode | Wholesaler Item Number |
| Mfg item number | C | 83 | 20 | PO_PurchaseOrderDetail.UDF_MFG_ITEM | Mfg item number |
| Pack | C | 103 | 7 | PO_PurchaseOrderDetail.UDF_PACK | Item Packing |
| Size | C | 110 | 7 | PO_PurchaseOrderDetail.UDF_SIZE | Size |
| UOM | C | 117 | 7 | PO_PurchaseOrderDetail.UnitOfMeasure | Unit of Measure |
| Vendor Number | C | 124 | 10 | PO_PurchaseOrderHeader.VendorNo | Vendor Number (from PO) |
| Vendor Name | C | 134 | 30 | PO_PurchaseOrderHeader.PurchaseName | Vendor Name (from PO) |
| Slot | C | 164 | 10 | (Leave blank - future use) | Restocking Location |
| Kit Number | C | 174 | 10 | (Leave blank - future use) | Leave Blank - future reference field |
| Hazmat Flag | C | 184 | 1 | (Leave blank) | Y/N |
| Package Type | C | 185 | 1 | (Leave blank - future use) | Leave Blank - future reference field |
| Expiration Date | C | 186 | 10 | (Leave blank - future use) | YYYYMMDD or NNN (days). Calc from system date + shelf life. |
| Catch Weight Item | C | 196 | 1 | PO_PurchaseOrderDetail.UDF_CWITEM | Y/N Default = N |
| Lot Control Item | C | 197 | 1 | PO_PurchaseOrderDetail.UDF_LCITEM | Y/N Default = N |
| Full Case Label Item | C | 198 | 1 | (Default "Y") | Y/N Default = N |
| QOH - Legacy | N | 199 | 5 | (Leave blank) | Use Position 554 for QOH |
| Last Receive Date | D | 204 | 10 | (Leave blank - future use) | Last received date |
| Retail Price | N | 214 | 5 | (Leave blank - future use) | Customer Retail - format xxxxx no decimal |
| Retail UPC | C | 219 | 20 | (Leave blank - future use) | Retail UPC |
| Tax Code 1 | C | 239 | 4 | (Leave blank - future use) | Leave Blank - future reference field |
| Tax Code 2 | C | 243 | 4 | (Leave blank - future use) | Leave Blank - future reference field |
| Retail Price Stickers | C | 247 | 1 | (Leave blank - future use) | Leave Blank - future reference field |
| Color Code | C | 248 | 1 | (Leave blank - future use) | Color for displaying item on receiving screen. If blank and UOM <> CASE, assign R. |
| UPC capture | C | 249 | 1 | (Leave blank - future use) | Y/N to request UPC Capture if feature enabled |
| Misc Future Flags | C | 250 | 1 | (Leave blank) | Leave Blank - future reference field |
| Message 1 | C | 251 | 35 | (Leave blank - future use) | Line message 1 |
| Message 2 | C | 286 | 35 | (Leave blank - future use) | Line message 2 |
| Message 3 | C | 321 | 35 | (Leave blank - future use) | Line message 3 |
| Price Tag Msg 1 | C | 356 | 6 | (Leave blank) | Leave Blank - future reference field |
| Price Tag Msg 2 | C | 362 | 18 | (Leave blank) | Leave Blank - future reference field |
| Catch Weight Min (Legacy) | N | 380 | 2 | (Leave blank - future use) | Catch Weight Minimum value |
| Catch Weight Max (Legacy) | N | 382 | 2 | (Leave blank - future use) | Catch Weight Maximum value |
| Misc 1 | C | 384 | 7 | (Leave blank - future use) | Misc 1 |
| Misc 2 | C | 391 | 35 | (Leave blank - future use) | Misc 2 |
| Cust Use Detail Field | C | 426 | 35 | (Leave blank - future use) | Field for customer use |
| Catch Weight Min | N | 461 | 6 | PO_PurchaseOrderDetail.UDF_CWMIN | Catch Weight Min - format xxxx.xx, implied decimal |
| Catch Weight Max | N | 467 | 6 | PO_PurchaseOrderDetail.UDF_CWMAX | Catch Weight Max - format xxxx.xx, implied decimal |
| Unit Weight | N | 473 | 6 | (Leave blank - future use) | Unit Weight - format xxxx.xx, implied decimal |
| Collect Serial Number | C | 479 | 1 | (Leave blank - future use) | Y/N |

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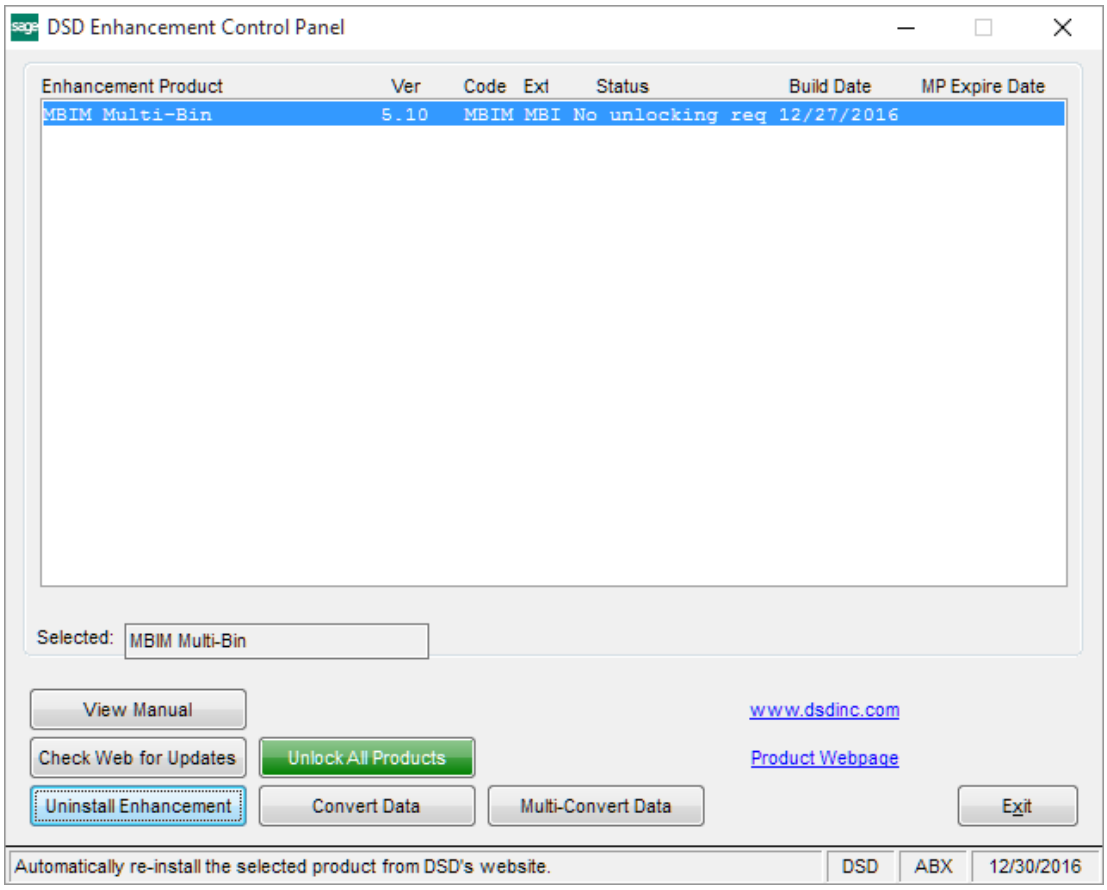
| Field Name | Type | Start | Len | Sage 100 PO Source | Description |
|---|---|---|---|---|---|
| Force GS-1 Parsing | C | 480 | 1 | Default "Y") | Y/N - Default to Y |
| Item Desc (Extended) | C | 481 | 60 | CI_ExtendedDescription.ExtendedDescription Text | Extended item description |
| COOL Code Type | C | 541 | 2 | (Leave blank - future use) | 2 char COOL code collection type. Blank if not used. |
| PO quantity | N | 543 | 8 | PO_PurchaseOrderDetail.QuantityOrdered | Quantity required for PO (NEW - use this field) |
| Reserved | C | 551 | 3 | (Blank) | Reserved for future use |
| QOH | N | 554 | 8 | Quantity on Hand | Quantity on Hand (NEW - use this field) |
| Level | C | 562 | 1 | Default "1") | Level 1, 2, 3, n |
| Reserved | C | 563 | 50 | (Leave blank - future use) | Reserved for future use |
| Temperature Capture | C | 613 | 1 | (Leave blank - future use) | Y to capture item temperature at receive time |
| SerialMin | N | 614 | 3 | (Leave blank - future use) | Min length of captured Serial Number (1-499) |
| SerialMax | N | 617 | 3 | (Leave blank - future use) | Max length of captured Serial Number (2-500) |
| Unit Volume | N | 620 | 8 | CI_Item.Volume | Unit Volume. Format xxxxx.xxx, implied decimal. |
| Reserved Detail | C | 628 | 20 | (Leave blank - future use) | Reserved for future use |
| Kill Date Days | C | 648 | 4 | (Leave blank - future use) | Days past kill date to prohibit receiving |
| Reserved Detail | C | 652 | 348 | (Blank) | Reserved for future use |

| Field Name | Type | Start | Len | Sage 100 PO Source | Description |
|---|---|---|---|---|---|
| Record designator | C | 1 | 1 | (Literal "U") | "U" for Additional UPC |
| Record Type | C | 2 | 1 | (Leave blank - future use) | "P" or "S" - same as associated detail record |
| UoW Sequence Number | N | 3 | 6 | (Leave blank - future use) | Same as associated detail record |
| UPC | C | 9 | 40 | (Leave blank - future use) | UPC number for line item |
| Description | C | 49 | 30 | (Leave blank - future use) | Description for Additional UPC |

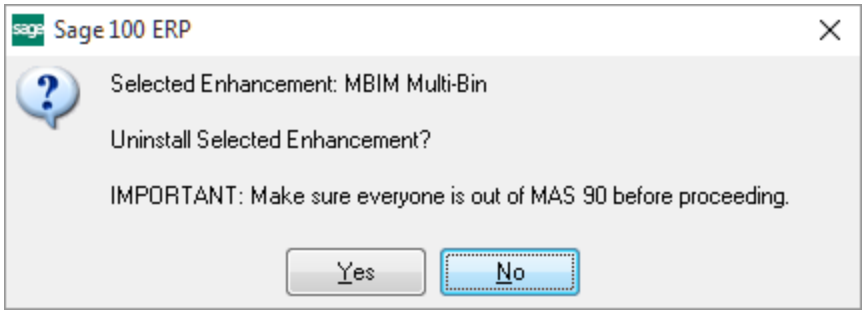

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## Section E: Uninstall DSD Enhancements

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.



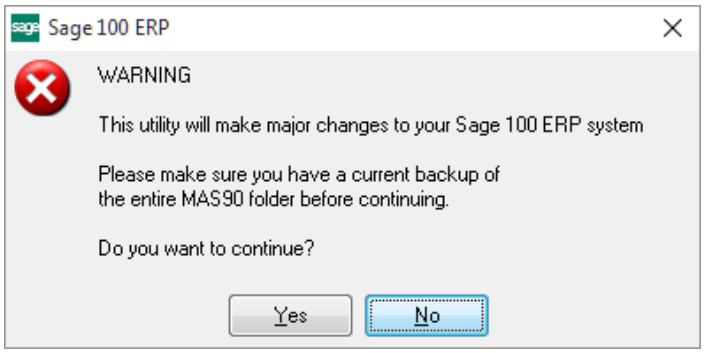

When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:




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

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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.



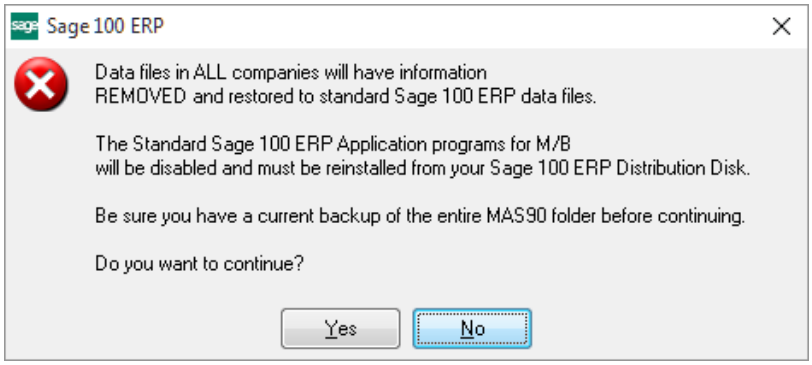

Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

**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.

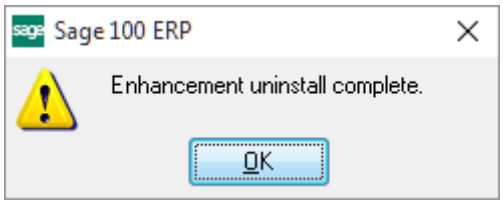
The following message box will appear, displaying the final warning message.




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).

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