# DSD Business Systems

Sage 100 Enhancements

## S023

## Item Sales History

SO-1023

Version 5.10

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Item Sales History User's Manual
Version 5.10

15 July, 2015

DSD Business Systems
5120 Shoreham Place
Suite 280
San Diego, CA 92122
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*

S023 Item Sales History:

http://www.dsdinc.com/enhancement/item-sales-history-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.*


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*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.

## *Item Sales History Features*

This DSD Extended Solution allows you to view detailed Item Sales History by Customer/Item Number from Sales Order Entry, S/O Invoice Entry, A/R Customer Maintenance and Inquiry, and Inventory Item Maintenance and Inquiry.

The A/R Setup Option to Retain Invoice History in Detail must be set to Yes in order for this to function.
Additional functionality exists if the Custom Office Module is activated.

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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 |
|---|---|---|
| S/O | Y | 5.10 |
| A/R | Y | 5.10 |
| I/M | Y | 5.10 |

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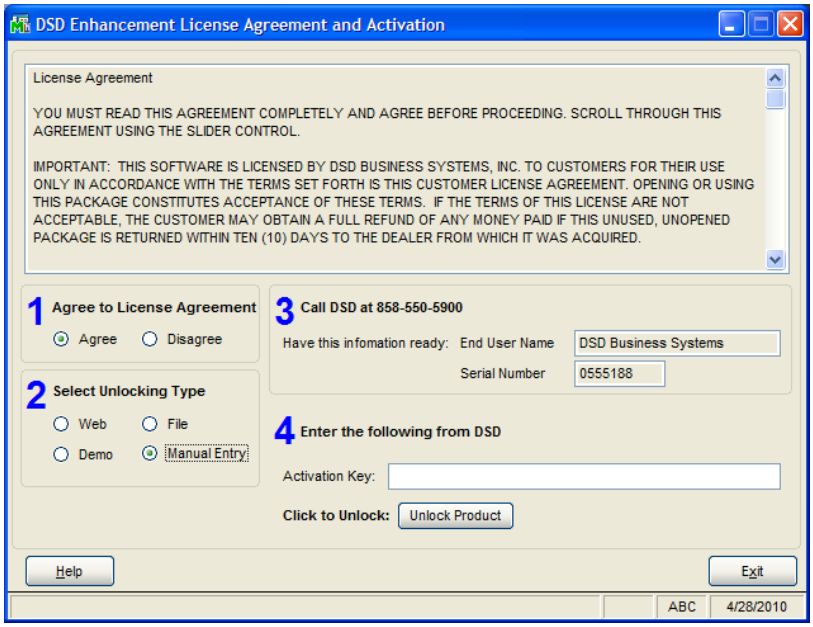
**Web Unlock:** If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from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

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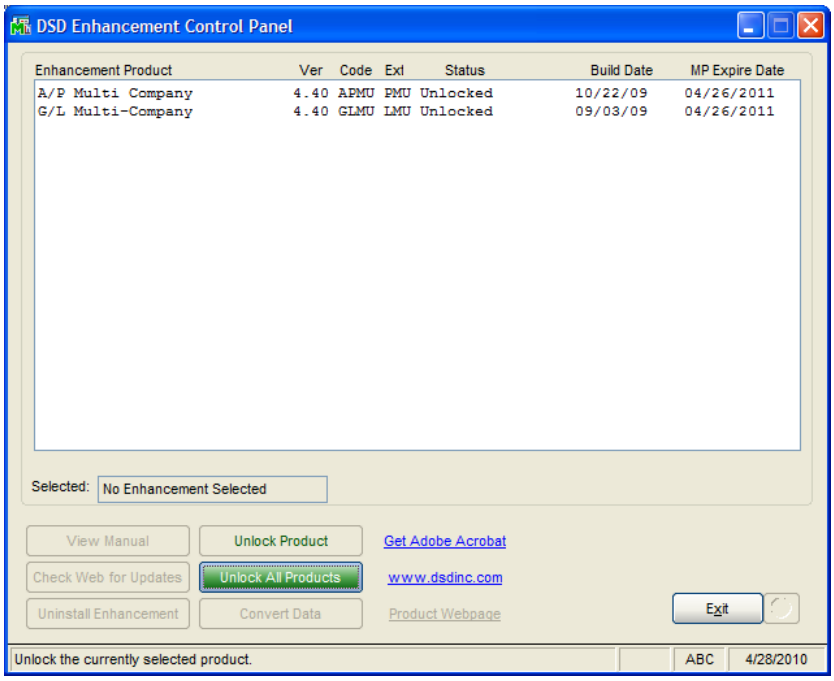
## *DSD Enhancement Control Panel*

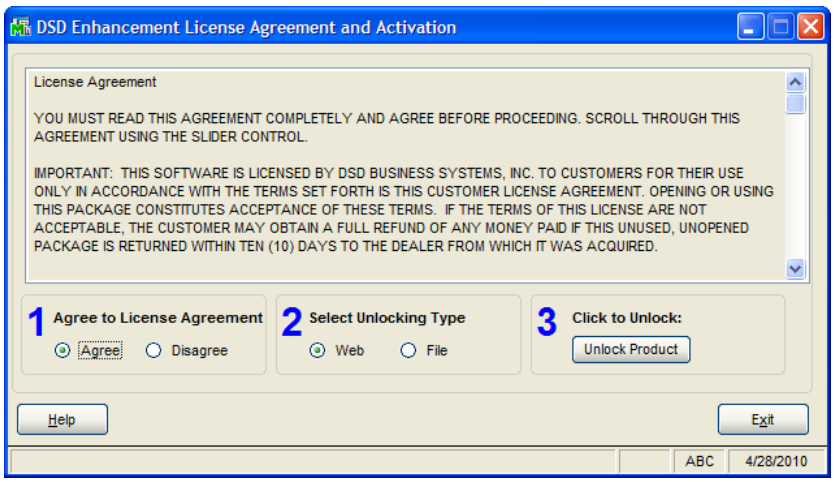
Starting with version 3.61, all DSD Enhancement products include DSD's Enhancement Control Panel. The **DSD Enhancement Control Panel is accessed from the Library Master Utilities menu**.




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 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.*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**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.

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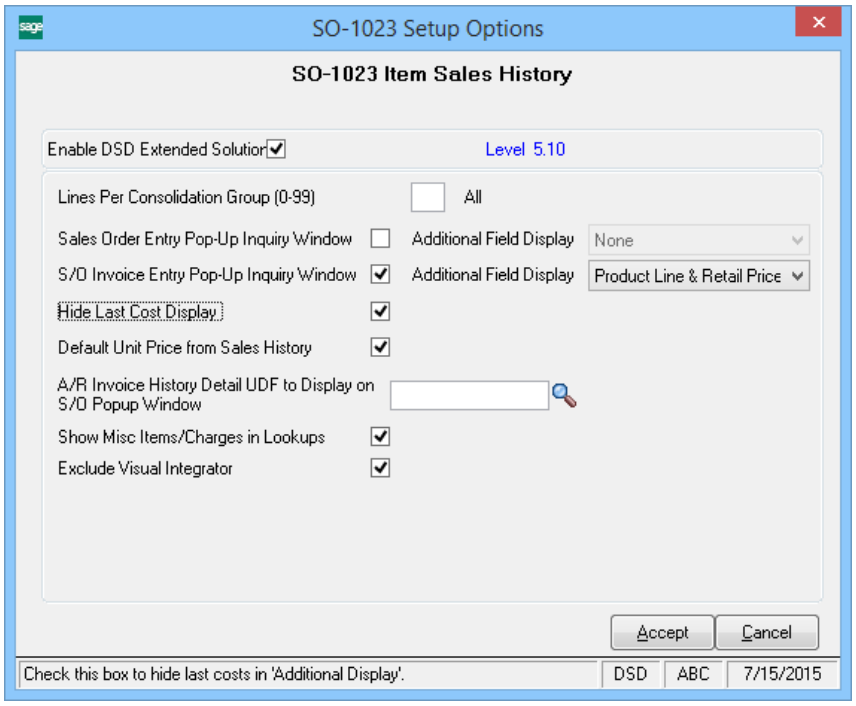
# Section C: Setup

Upon completion of software installation, you will need to access the 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 DSD Extended Solution' box to activate this Extended Solution.




Answer the following prompts:

**Lines Per Consolidation Group:** Enter a number from zero (0) to ninety-nine (99). The number entered here establishes how many entries will be displayed for each item in the Item Sales History Lookup window, showing the most recent to the oldest. Set the lines per consolidation group to '0' to show ALL item sales for the selected customer.

**Sales Order Entry Pop-up Inquiry Window:** Check this box if you want a 'Sales Order Pop-Up Inquiry Window' to appear during S/O Data Entry. The pop-up window will display information specific to the item referenced on the line and the customer referenced on the order. This window will display the item's Last (standard) Cost, Date of Last Receipt, Date Last Sold, Last Unit Price Sold, Last Quantity Sold and Unit of Measure.

**S/O Invoice Entry Pop-up Inquiry Window:** Check this box if you want an 'S/O Invoice Entry Pop-Up Window' to appear during S/O Invoice Entry. The pop-up window will display the same information as listed above.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**Additional Field Display:** The drop-box options are 'None,' 'Quantities & Gross Profit,' and 'Product Line & Retail Price' for both the Sales Order Entry Pop-Up Inquiry Window and the S/O Invoice Entry Pop-Up Inquiry Window. See Operations below for details.

**Hide Last Cost Display:** Check this box to hide the 'Last COS,' 'Last Prch Cst,' and 'Item Last Cost' in the Additional Display Fields. When this box is checked the GP% in the display will always use the Item's Standard Cost.

**Default Unit Price from Sales History:** Check this box to use the last Unit Price from Item Sales History records for the Customer/Item as the default Unit Price.

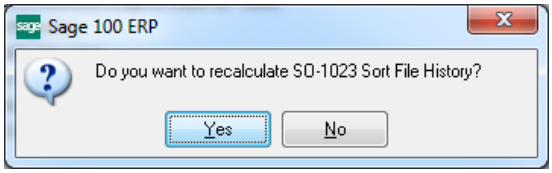
**A/R Invoice History Detail UDF to Display on S/O Popup Window:** If you indicate an A/R Invoice History Detail UDF it will be added to the bottom of whatever display option you select in both the S/O and S/O Invoice pop-up windows.

**Show Misc Charges/Items in Lookups:** Check this box to include Miscellaneous Charges and Misc Items in the Sales History lookups. Leave unchecked to display only inventory lines.

**Exclude Visual Integrator:** Check this box to exclude defaulting the unit price from Sales History when using Visual Integrator for Sales Order and Invoice entry.

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

**Note:** It may be necessary to populate the Customer/Item History Sort File after the Setup Options have been completed. The Library Master, "Rebuild Sort Files" utility for Sales Order has been modified to include this task.




*Role Maintenance*

The following Task has been added to Sales Order, Setup Options:

- Extended Solutions Setup

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

**Note:** Because the Extended Solution does not have a workstation installation, SY_WDX needs to be copied into each workstation's SOA directory.

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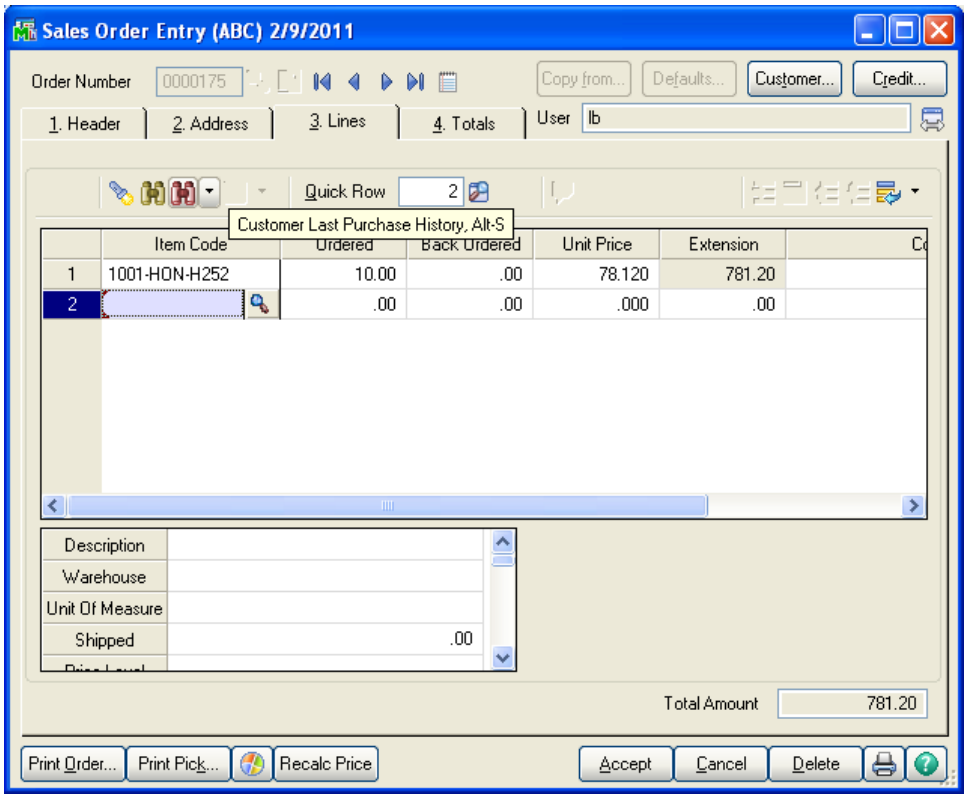
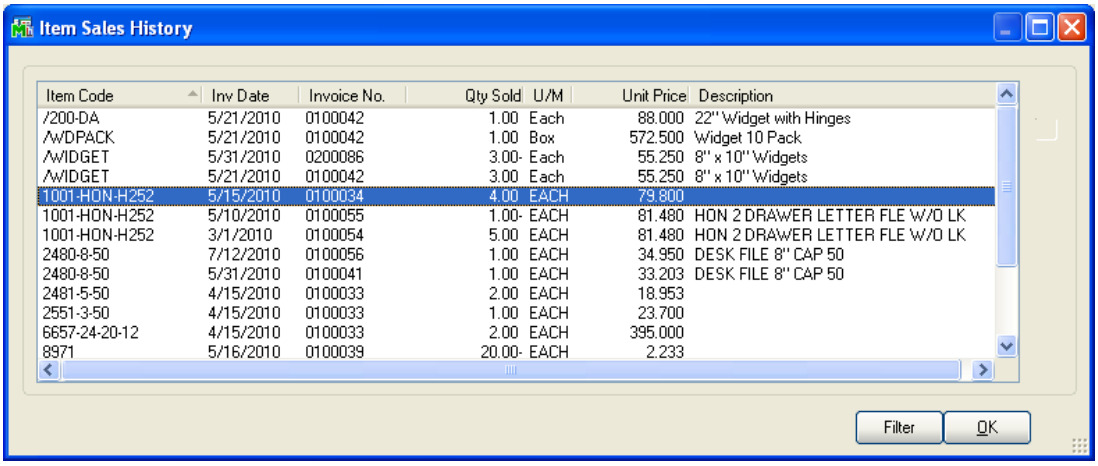
# Section D: System Operations

## *Sales Order and S/O Invoice Line Entry*

Sales Order and Sales Invoice Line Entry's Customer Last Purchase History buttons have been modified. Click the drop down list button next to the red binoculars to access 'Item Sales History'.





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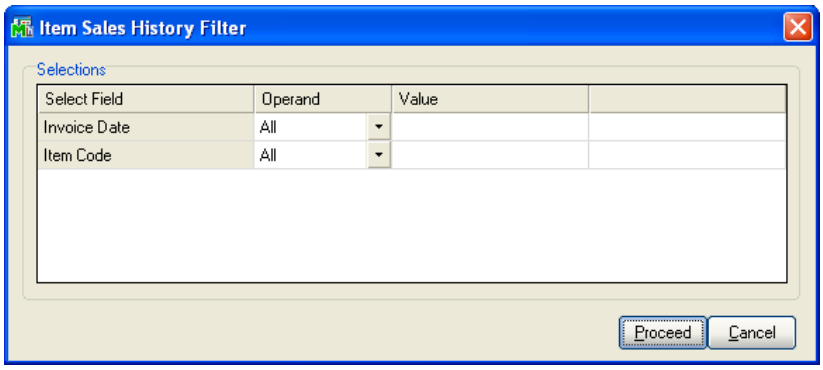
The customer's sales records are consolidated and listed by Item Number in reverse Invoice Date order (most recent at the top). Click the Filter button to specify Invoice Date or Invoice Code. After clicking Proceed, you will be returned to Item Sales History with only the data that matches that criteria displayed. The filtered selections are not saved.



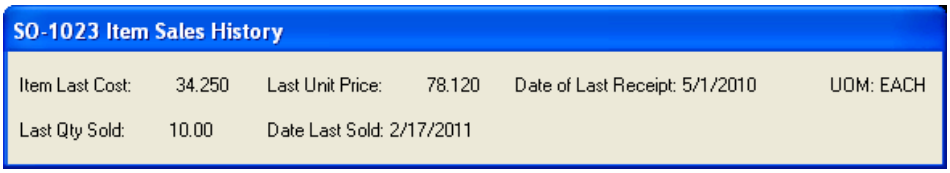

A window will display while the list box is loading to let you know where in history the program is. If you wish to stop the search at the date on the screen, press the X key on your keyboard.

You can choose any of the listed lines. This history is drawn from the A/R History File, so the Item Sales History will be available only as long as the A/R History is kept.

If you elected to include Miscellaneous Charges and Items, these will be included in the lookup. If not, then only Inventory items will be returned.

If you checked the 'Sales Order Pop-up Inquiry Window' box in Setup, a pop-up Inquiry window will appear when you edit a Sales Order line. The window will display information specific to the item referenced on the line and the customer referenced on the order. This window will display the item's Last Unit Cost from Inventory, the Date of Last Receipt, Date Last Sold, Last Unit Price Sold, Last Quantity Sold and Unit of Measure.

If you selected 'None' from the 'Additional Field Display' option in Setup, the window will look like the one below.

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If you selected 'Quantities & Gross Profit Info' from the 'Additional Field Display' option in Setup, the window will look like the one below.

The Qty On Hand, On PO, On SO and On BO contain summed values across all warehouses.

Qty Available = Qty On Hand + Qty On PO - Qty on SO - Qty on BO.

(Inclusion of Qty On PO in the Qty Available calculation is dependent on the I/M Setup option on whether On PO is included.)

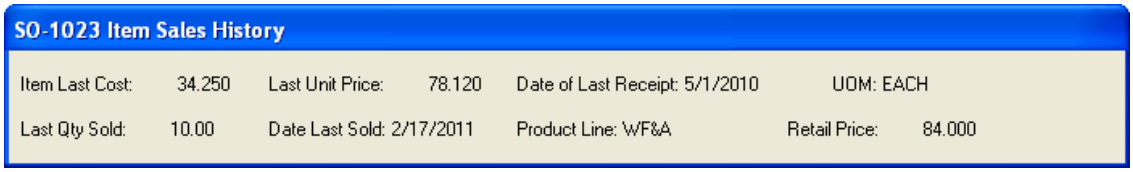
Three unit cost fields will display: Last COS (most recent unit cost associated with this item in A/R Invoice History), Last Purchase Cost (Item Last Cost from Inventory) and the item's Standard Cost.

Gross Profit % will contain the result of this calculation:
[Unit Price - Std Cost] / Unit Price
This will recalculate every time the Unit Price is changed

One of the following messages will display in the lower right corner:

- If the Std Cost is *greater than* Last COS, the message will read 'Std Cost Has Increased.'
- If the Std Cost is *less than* Last COS, the message will read 'Std Cost Has Decreased.'
- If the Std Cost is *equal to* Last COS, the message will read 'Std Cost Has Not Changed.'

If you selected 'Product Line & Retail Price' from the 'Additional Field Display' option in Setup, the window will look like the one below.




*In all of the above options, if an A/R Invoice History Detail UDF was specified in Setup, the UDF will display in the bottom of the window.*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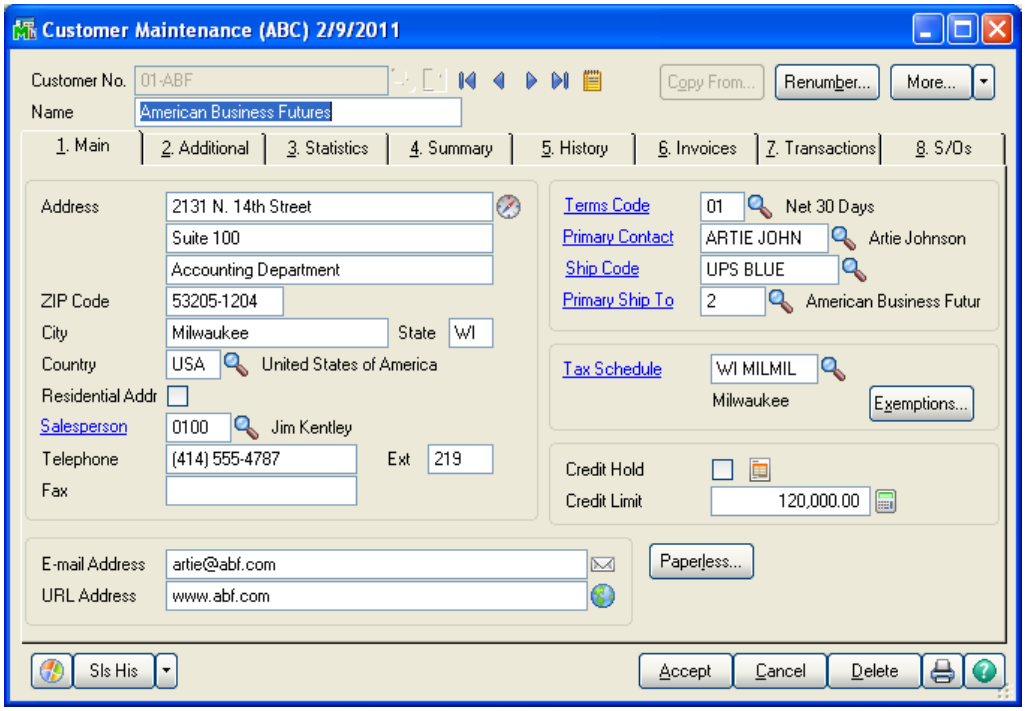
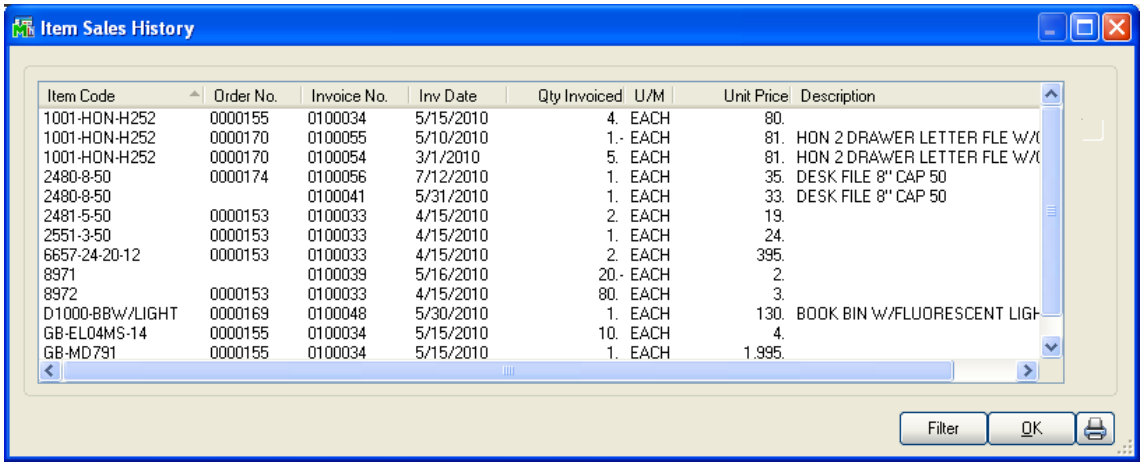
## *Customer Maintenance and Customer Inquiry*

A 'Sls His...' button has been added to the bottom of Customer Maintenance and Customer Inquiry. Click this button to bring up the Item Sales History Inquiry screen.




Item Sales History allows you to view and print the same Sales History data for the customer noted above in Sales Order (the print option is available only when you access Item Sales History through Customer Maintenance/Inquiry). Data is presented in Item Number order. The transactions will appear in reverse order (i.e., the most recent sale first).




| Item Code | Order No. | Invoice No. | Inv Date | Qty Invoiced | U/M | Unit Price | Description |
|---|---|---|---|---|---|---|---|
| 1001-HON-H252 | 0000155 | 0100034 | 5/15/2010 | 4. | EACH | 80. | |
| 1001-HON-H252 | 0000170 | 0100055 | 5/10/2010 | 1.- | EACH | 81. | HON 2 DRAWER LETTER FLE W/( |
| 1001-HON-H252 | 0000170 | 0100054 | 3/1/2010 | 5. | EACH | 81. | HON 2 DRAWER LETTER FLE W/( |
| 2480-8-50 | 0000174 | 0100056 | 7/12/2010 | 1. | EACH | 35. | DESK FILE 8" CAP 50 |
| 2480-8-50 | | 0100041 | 5/31/2010 | 1. | EACH | 33. | DESK FILE 8" CAP 50 |
| 2481-5-50 | 0000153 | 0100033 | 4/15/2010 | 2. | EACH | 19. | |
| 2551-3-50 | 0000153 | 0100033 | 4/15/2010 | 1. | EACH | 24. | |
| 6657-24-20-12 | 0000153 | 0100033 | 4/15/2010 | 2. | EACH | 395. | |
| 8971 | | 0100039 | 5/16/2010 | 20.- | EACH | 2. | |
| 8972 | 0000153 | 0100033 | 4/15/2010 | 80. | EACH | 3. | |
| D1000-BBW/LIGHT | 0000169 | 0100048 | 5/30/2010 | 1. | EACH | 130. | BOOK BIN W/FLUORESCENT LIGH |
| GB-EL04MS-14 | 0000155 | 0100034 | 5/15/2010 | 10. | EACH | 4. | |
| GB-MD791 | 0000155 | 0100034 | 5/15/2010 | 1. | EACH | 1.995. | |

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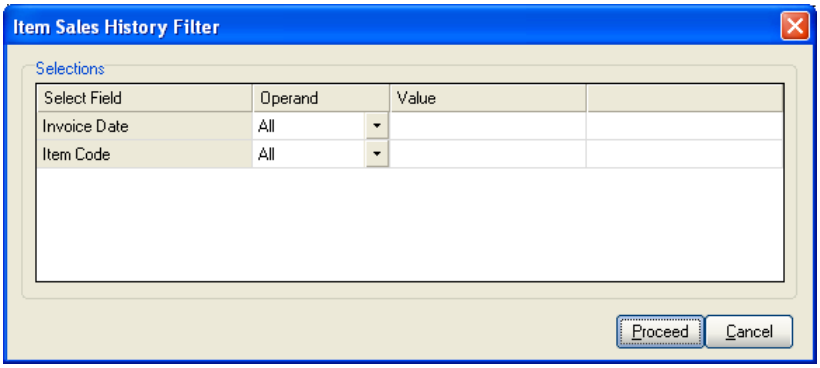
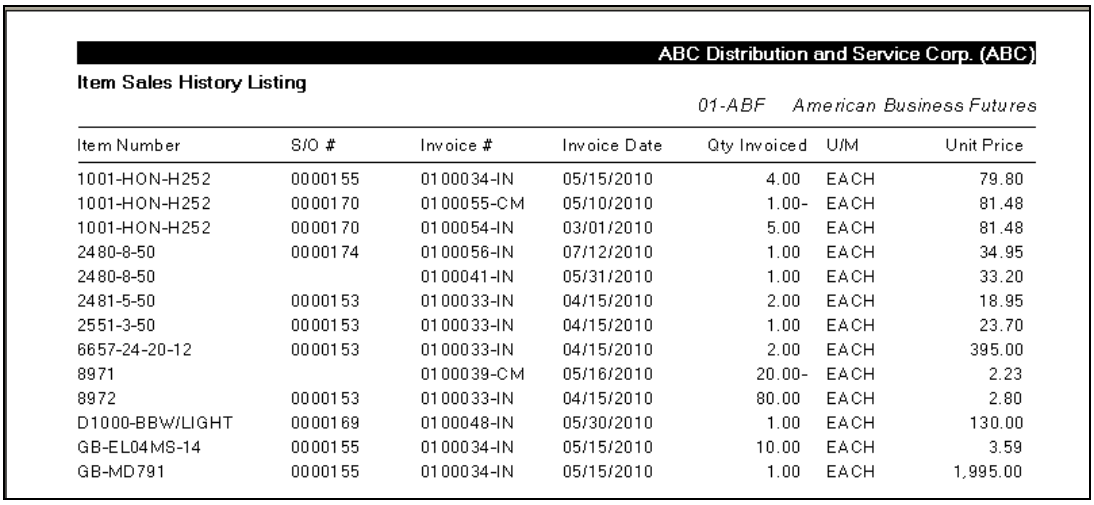
Click the Filter button to specify Invoice Date or Item Code. After clicking Proceed you will be returned to Item Sales History with only the data which matches that criteria displayed. The filtered selections are not saved and do not apply to the report.




Click the print button to print the Item Sales History Listing for the customer.



ABC Distribution and Service Corp. (ABC)

**Item Sales History Listing**

*01-ABF American Business Futures*

| Item Number | S/O # | Invoice # | Invoice Date | Qty Invoiced | U/M | Unit Price |
|---|---|---|---|---|---|---|
| 1001-HON-H252 | 0000155 | 0100034-IN | 05/15/2010 | 4.00 | EACH | 79.80 |
| 1001-HON-H252 | 0000170 | 0100055-CM | 05/10/2010 | 1.00- | EACH | 81.48 |
| 1001-HON-H252 | 0000170 | 0100054-IN | 03/01/2010 | 5.00 | EACH | 81.48 |
| 2480-8-50 | 0000174 | 0100056-IN | 07/12/2010 | 1.00 | EACH | 34.95 |
| 2480-8-50 | | 0100041-IN | 05/31/2010 | 1.00 | EACH | 33.20 |
| 2481-5-50 | 0000153 | 0100033-IN | 04/15/2010 | 2.00 | EACH | 18.95 |
| 2551-3-50 | 0000153 | 0100033-IN | 04/15/2010 | 1.00 | EACH | 23.70 |
| 6657-24-20-12 | 0000153 | 0100033-IN | 04/15/2010 | 2.00 | EACH | 395.00 |
| 8971 | | 0100039-CM | 05/16/2010 | 20.00- | EACH | 2.23 |
| 8972 | 0000153 | 0100033-IN | 04/15/2010 | 80.00 | EACH | 2.80 |
| D1000-BBW/LIGHT | 0000169 | 0100048-IN | 05/30/2010 | 1.00 | EACH | 130.00 |
| GB-EL04MS-14 | 0000155 | 0100034-IN | 05/15/2010 | 10.00 | EACH | 3.59 |
| GB-MD791 | 0000155 | 0100034-IN | 05/15/2010 | 1.00 | EACH | 1,995.00 |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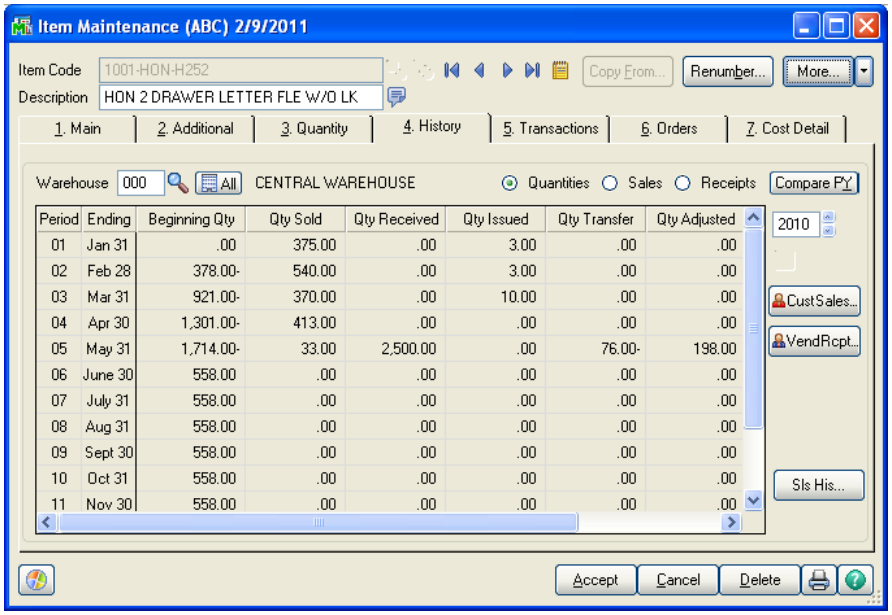
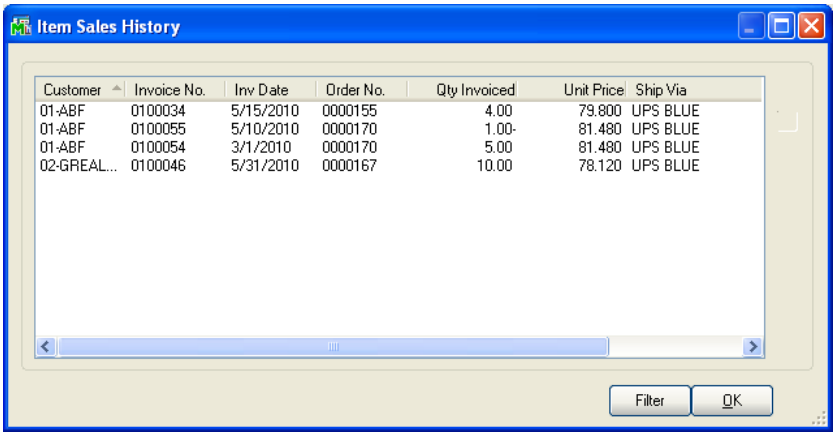
## *Inventory Inquiry and Inventory Maintenance*

A 'Sls His...' button has been added to the '4. History' tab in Inventory Inquiry and Inventory Maintenance.



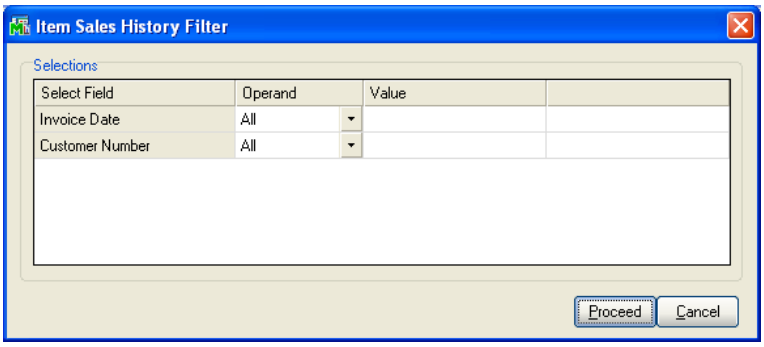

| Period | Ending | Beginning Qty | Qty Sold | Qty Received | Qty Issued | Qty Transfer | Qty Adjusted |
|---|---|---|---|---|---|---|---|
| 01 | Jan 31 | .00 | 375.00 | .00 | 3.00 | .00 | .00 |
| 02 | Feb 28 | 378.00- | 540.00 | .00 | 3.00 | .00 | .00 |
| 03 | Mar 31 | 921.00- | 370.00 | .00 | 10.00 | .00 | .00 |
| 04 | Apr 30 | 1,301.00- | 413.00 | .00 | .00 | .00 | .00 |
| 05 | May 31 | 1,714.00- | 33.00 | 2,500.00 | .00 | 76.00- | 198.00 |
| 06 | June 30 | 558.00 | .00 | .00 | .00 | .00 | .00 |
| 07 | July 31 | 558.00 | .00 | .00 | .00 | .00 | .00 |
| 08 | Aug 31 | 558.00 | .00 | .00 | .00 | .00 | .00 |
| 09 | Sept 30 | 558.00 | .00 | .00 | .00 | .00 | .00 |
| 10 | Oct 31 | 558.00 | .00 | .00 | .00 | .00 | .00 |
| 11 | Nov 30 | 558.00 | .00 | .00 | .00 | .00 | .00 |

Click this button to bring up Item Sales History in Customer Number/ reverse Invoice date order.




| Customer | Invoice No. | Inv Date | Order No. | Qty Invoiced | Unit Price | Ship Via |
|---|---|---|---|---|---|---|
| 01-ABF | 0100034 | 5/15/2010 | 0000155 | 4.00 | 79.800 | UPS BLUE |
| 01-ABF | 0100055 | 5/10/2010 | 0000170 | 1.00- | 81.480 | UPS BLUE |
| 01-ABF | 0100054 | 3/1/2010 | 0000170 | 5.00 | 81.480 | UPS BLUE |
| 02-GREAL... | 0100046 | 5/31/2010 | 0000167 | 10.00 | 78.120 | UPS BLUE |

Click the Filter button to specify Invoice Date or Customer Number. After clicking Proceed you will be returned to Item Sales History with only the data which matches that criteria displayed. The filtered selections are not saved.

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## *Helpful Hints*

- The quantity invoiced and unit price values will be displayed in the sales order unit of measure on the Customer Maintenance and Inquiry screens and will be displayed in the standard unit of measure on the Inventory screens.

## *ODBC Dictionary*

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

| *File:* | *Fields:* |
|---|---|
| SO_1023ItemSalesHistory001.rpt | All Fields |

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


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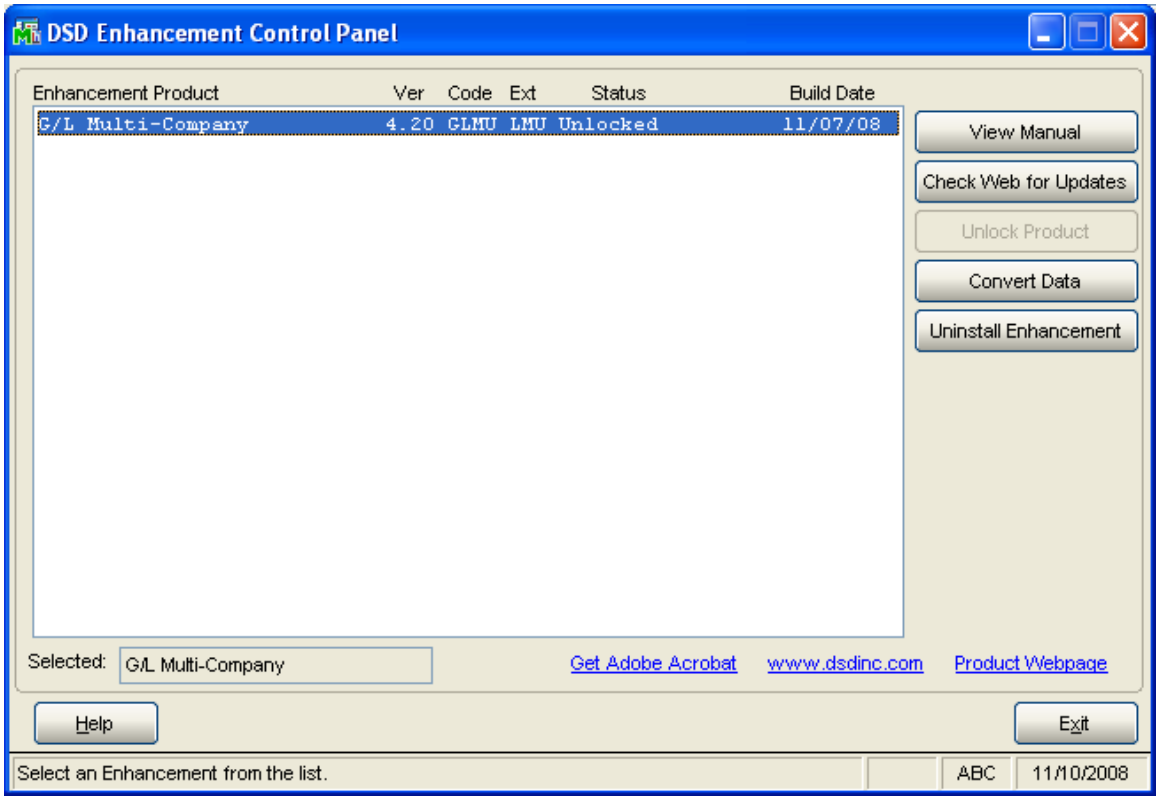
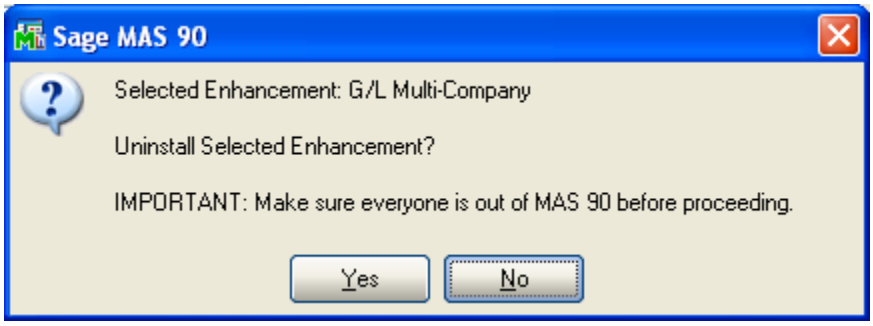
# Section E: Uninstall DSD Enhancements

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 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.

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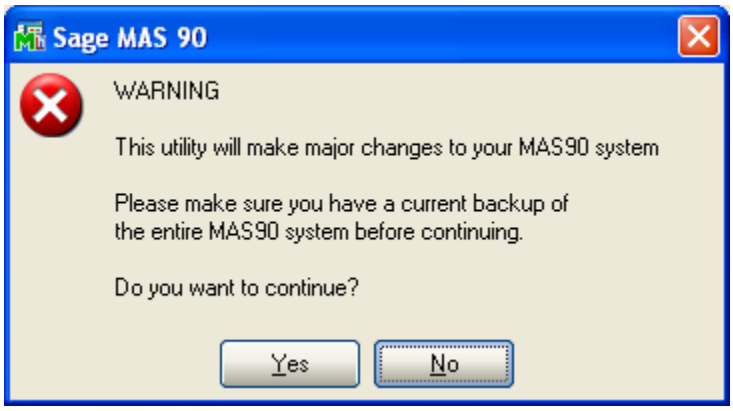
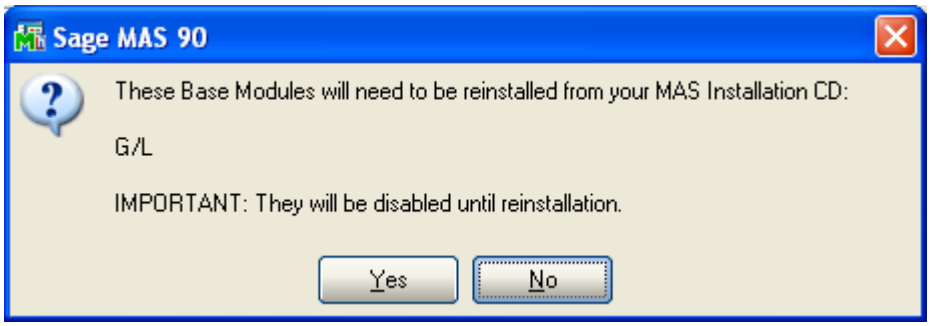
The following message box will appear, to remind you that a complete backup of your entire MAS90 system should be completed prior to uninstalling a DSD product.




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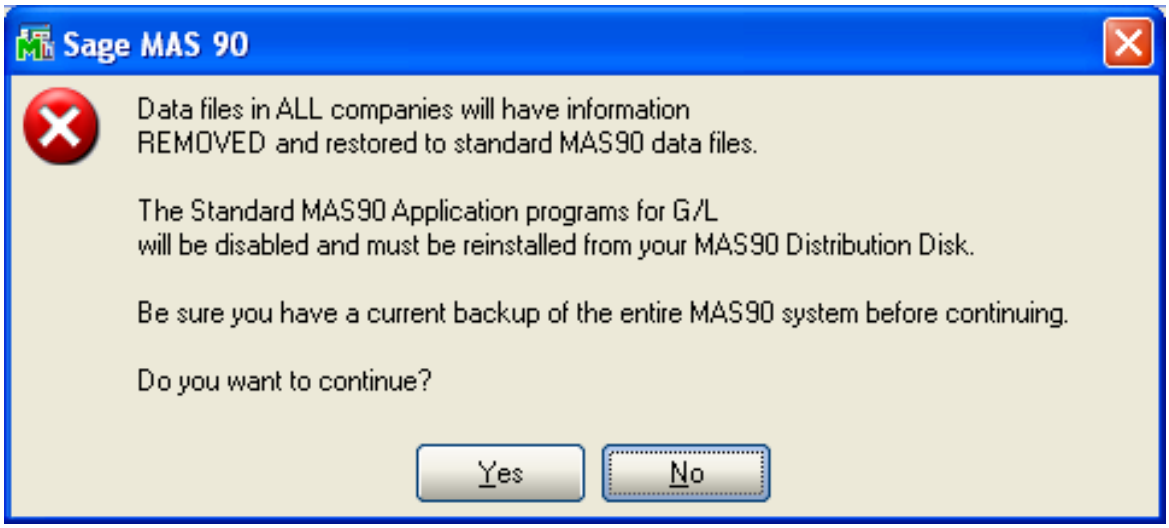
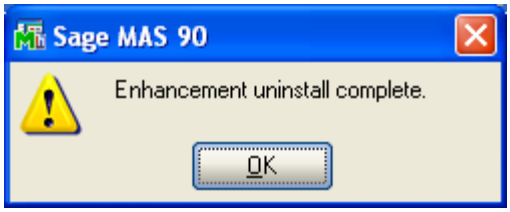
The following message box will appear, displaying the final warning message.

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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| | Company: | | Fax: | |
| Date: | / / | # Pgs Including this Page: | | |
| Subject: | Check One: | ☐ Product Problem | ☐ Suggestions | |
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