



# DSD Business Systems

**Sage 100 Enhancements**

**SOUS**

**Sales Order Upsell**

**Version 5.40**



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Sales Order Upsell User's Manual  
Version 5.40

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## Section A: Introduction

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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*

SOUS Sales Order Upsell:

<http://www.dsdinc.com/enh/pages/SOUS.htm>

The product web page contains:

- Product Description*
- Web Links*
- Current Product Version Table*
- Product Installation File Download*
- Product Manual in .pdf Format*
- Revision History*
- FAQ*

### Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate. DSD's telephone number is **858-550-5900**. Fax: **858-550-4900**.

For a hard error, where the program displays an error dialog, report:

- Error number.*
- Program name.*
- Line number.*
- Program version.*
- Exact sequence that caused the error, including menus and menu selections.*
- Other pertinent information.*

If leaving a message or faxing, please include:

*Your name.*

*Your phone number (and fax if applicable) and extension.*

It is possible to be unable to duplicate a problem, because of data corruption or because we have not exactly duplicated a particular operating environment. In such circumstances, we can only continue to try to fix the problem if we can either access the system remotely or by some other to duplicate the system.

### ***Sales Order Upsell Features***

**Sales Order Upsell (SOUS)** is an ideal Sage 100 enhancement for companies looking to increase sales by upselling items during order or invoice entry. The SOUS enhancement allows users to define an unlimited number of “Upsell Items” for inventory items. When entering a sales order or sales order invoice, these items will appear as suggested add-on / upsell items that the customer may wish to purchase and can be automatically added to the order.

## 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
A/R	Y	5.40
S/O	Y	5.40
I/M	Y	5.40

### 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.

- 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.

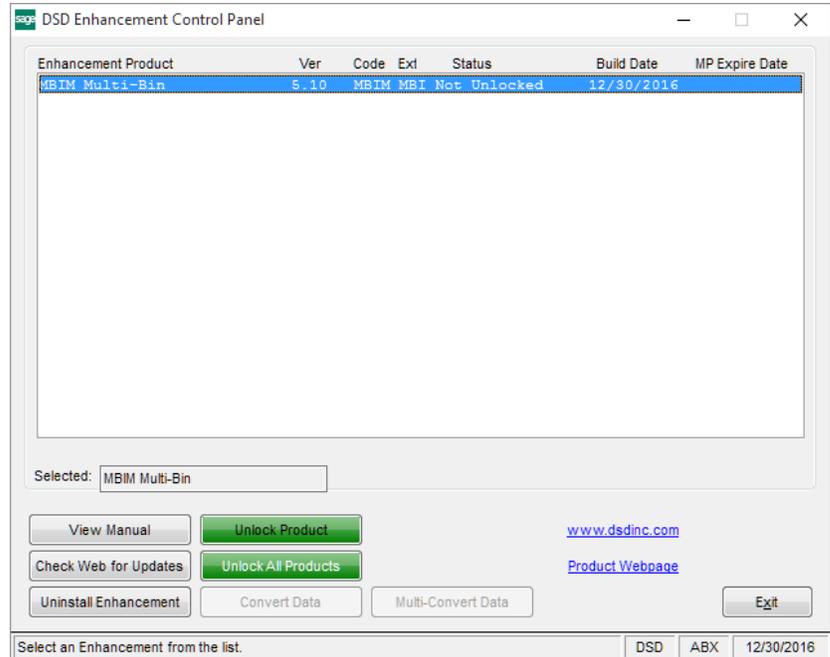
**View Manual:** This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct 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.*

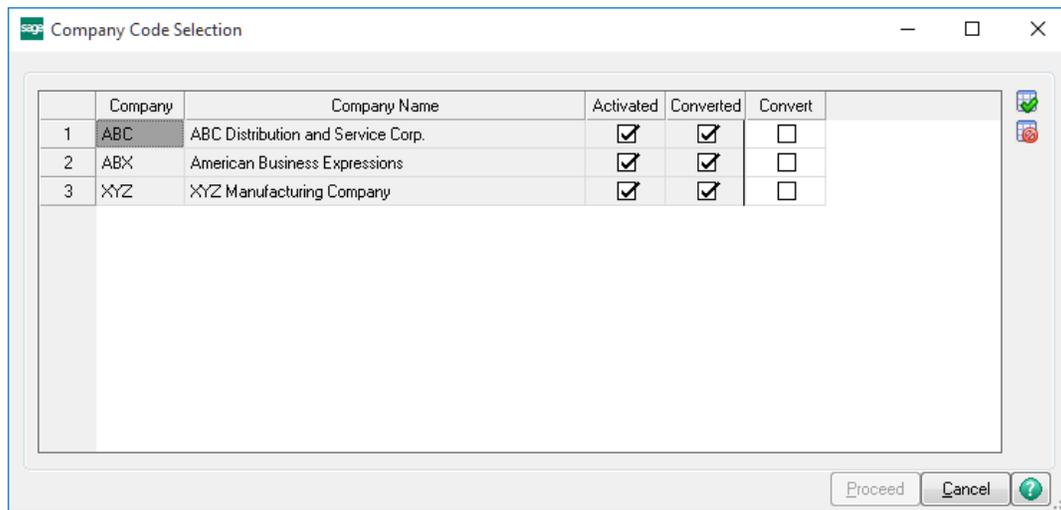
**Unlock Product:** This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

**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

### Role Maintenance

The following task has been added to the Sales Order Miscellaneous Tasks in Role Maintenance:

- S/O Upsell Options

You must enable this option in Role Maintenance after installing and unlocking the enhancement to access the S/O Upsell Options task.

### S/O Upsell Options

After installing, access S/O Upsell Options from the Sales Order Options Menu.

S/O Upsell Options (ABC) 6/8/2018

Enabled for Sales Order Entry	<input checked="" type="checkbox"/>
Enabled for SO Invoice Data Entry	<input checked="" type="checkbox"/>
Enable Recommended Unit of Measure	<input checked="" type="checkbox"/>
Enable Recommended Warehouse Code	<input checked="" type="checkbox"/>
Enable Recommended Quantities	<input checked="" type="checkbox"/>
Recommended Quantity Setting	Actual

Accept Cancel

**Enabled for Sales Order Entry / SO Invoice Data Entry:** Select these options to enable the Upsell Items screen in Sales Order Entry and SO Invoice Data Entry.

**Enable Recommended Unit of Measure:** Select this option to enable the Recommended Unit of Measure column in the Upsell Items screen. This field will default from the Items Sales Unit of Measure but may be changed in the Upsell items screen.

**Enable Recommended Warehouse Code:** Enabling this option will display a Warehouse Code column in the Upsell Items window which displays from Sales Order and Invoice Data Entry.

**Enable Recommended Quantities:** Enabling this option will display a Recommended Quantity column in the Upsell Items screens accessed from Item Maintenance, Sales Order and S/O Invoice Data Entry screens. When a recommended quantity is defined in Item Maintenance this quantity will be used when entering the Sales Order or Invoice but may also be overridden.

**Recommended Quantity Setting:** Select from Actual or Multiply. If the Recommended Quantity Setting is set to Actual then the Quantity Ordered in the Sales Order or Invoice will be set to the recommended quantity. If the Setting is set to Multiply then the Quantity Ordered for the Item will be the Recommended Quantity MULTIPLIED by the original regular item on the order.

## Section D: System Operations

### Item Maintenance / Inquiry

Once installed, a new Upsell Items option will be available from the 'More...' menu in Item Maintenance and Inquiry.

In this screen, you can add various Upsell Items to be displayed during the order/invoicing process. These items may be either regular inventory items or miscellaneous charges and items as well. Note: The columns displayed in this grid will depend on the options selected in the S/O Upsell Options screen.

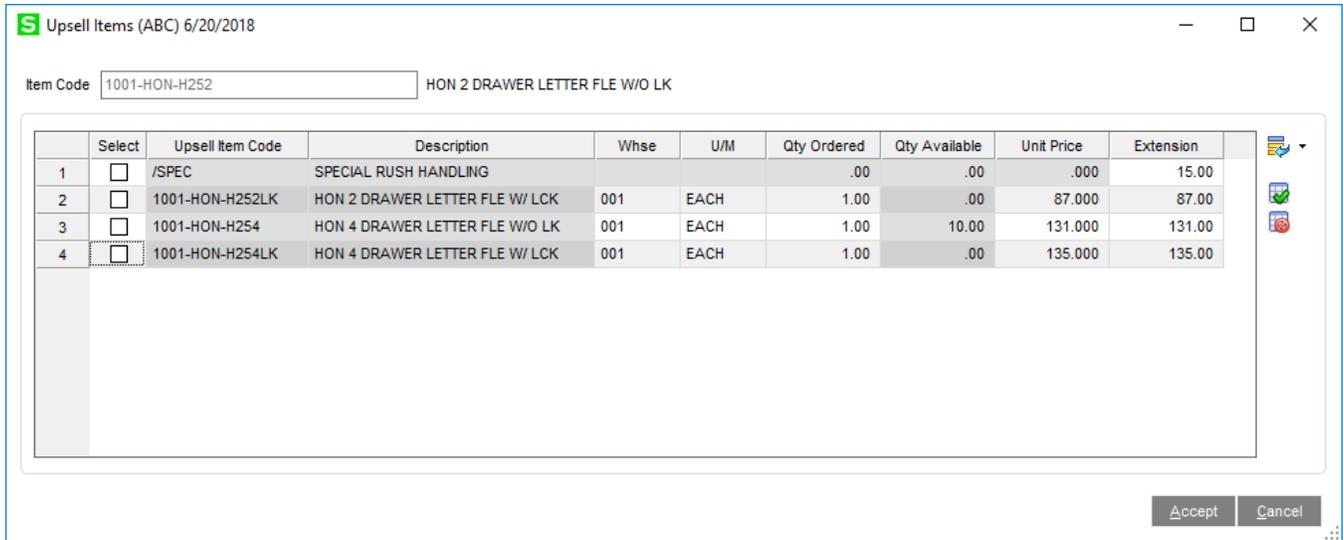
Item Code: 1001-HON-H252      HON 2 DRAWER LETTER FLE W/O LK

	Upsell Item Code	Item Code Description	U/M	Quantity	Qty Setting	
1	1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/ LCK	EACH	1.00	Actual	
2	1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK	EACH	1.00	Multiply	
3	1001-HON-H254LK	HON 4 DRAWER LETTER FLE W/ LCK	EACH	1.00	Multiply	
4	/SPEC	SPECIAL RUSH HANDLING		.00	Actual	
5				.00		

Accept    Cancel

**Sales Order Entry and Invoice Data Entry**

In Sales Order and Invoice Data Entry when an item is entered which has Upsell Items previously defined in Item Maintenance, the Upsell Items screen will be displayed.



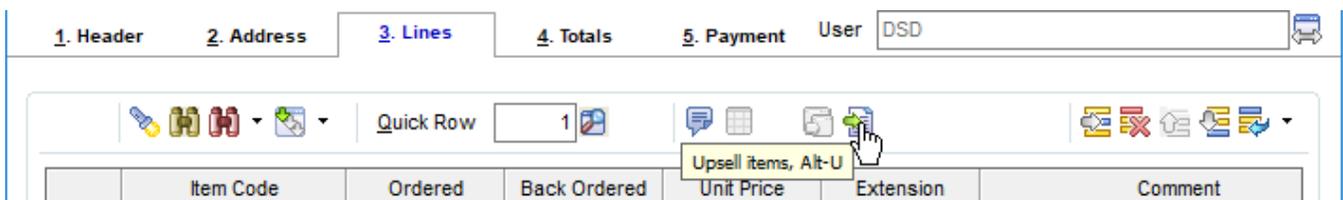
Users can select items manually to add to the order by using the Select column on the far left or the can check/uncheck all using the buttons to the right of the grid.

The Warehouse Code column and Unit of Measure column will only appear if these options have been enabled in S/O Upsell Options.

The Unit Price will be calculated using the normal Sage pricing hierarchy rules however these prices may be manually overridden in this screen.

If Upsell Items are selected in the grid and the user clicks Accept, the items will automatically be added to the Sales Order or Invoice.

The Upsell Items screen will not display again for that line unless you select the Upsell Items button which appears above the data entry grid.



**Utilities and Exclusions**

The Delete and Change Items Utility has been modified to also remove items from the IM\_UpsellItems\_234 file. No changes have been made to S/O Shipping Data Entry or the SO Sales Journal Update process.

**Dictionary Changes**

The following changes have been made to the dictionary upon installation of the enhancement.

Table: IM UpsellItems 234

Field Name	Description	Type	Length
ItemCode	Item Code	String	30
UpsellItemCode	Upsell Item Code	String	30
RecommendedUnitofMeasure	Recommended Unit of Measure	String	4
RecommendedQuantitySetting	Recommended Quantity Setting	String	1
RecommendedQuantity	Recommended Quantity	Number	
DateCreated	Creation Date	String	8
TimeCreated	Creation Time	String	8
UserCreatedKey	Creation User ID	String	10
DateUpdated	Last Update Date	String	8
TimeUpdated	Last Update Time	String	8
UserUpdatedKey	Last Update User ID	String	10

Table: SO UpsellOptions 234

Field Name	Description	Type	Length
ModuleCode	Module Code	String	3
EnabledforSalesOrderEntry	Enabled for Sales Order Entry	String	1
EnabledforSOInvoiceDataEntry	Enabled for SO Invoice Data Entry	String	1
EnableRecommendedUnitofMeasure	Enable Recommended Unit of Measure	String	1
EnableRecommendedWarehouseCode	Enable Recommended Warehouse Code	String	1
EnableRecommendedQuantities	Enable Recommended Quantities	String	1
DefaultRecomQuantitySetting	Default Recommended Quantity Setting	String	1
DateCreated	Creation Date	String	8
TimeCreated	Creation Time	String	8
UserCreatedKey	Creation User ID	String	10
DateUpdated	Last Update Date	String	8
TimeUpdated	Last Update Time	String	8
UserUpdatedKey	Last Update User ID	String	10

Table: SO SalesOrderUpsellItems 234

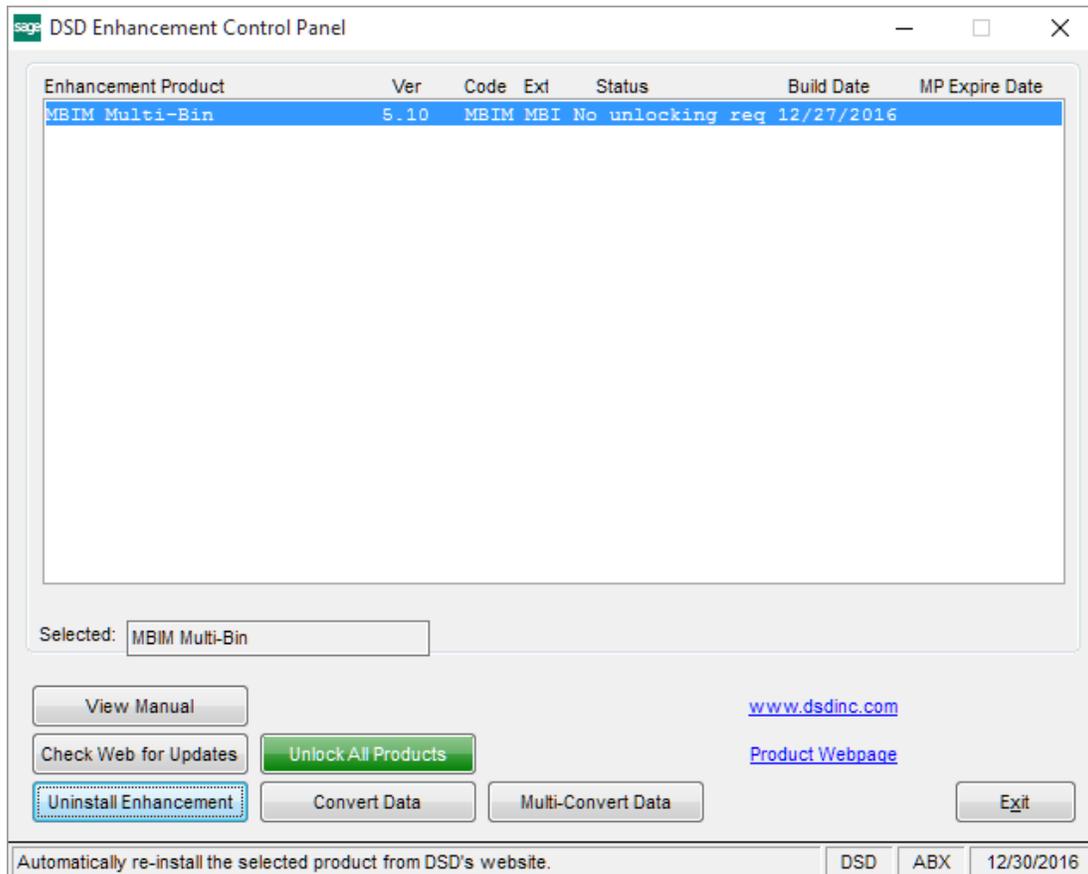
Field Name	Description	Type	Length
SalesOrderNo	Sales Order Number	String	7
ItemCode	Item Code	String	30
UpsellItemCode	Upsell Item Code	String	30
UpsellItemType	Upsell Item Type	String	1
UpsellValuation	Upsell Valuation	String	1
WarehouseCode	WarehouseCode	String	3
UnitOfMeasure	Unit of Measure	String	4
PriceLevel	PriceLevel	String	1
Select	Select	String	1
UnitOfMeasureConvFactor	Unit Of Measure Conversion	Number	
QuantityOrdered	Quantity Ordered	Number	
QuantityAvailable	Quantity Available	Number	
UnitPrice	Unit Price	Number	
UnitCode	Unit Cost	Number	
ExtensionAmt	Extension Amount	Number	

Table: SO InvoiceUpsellItems 234

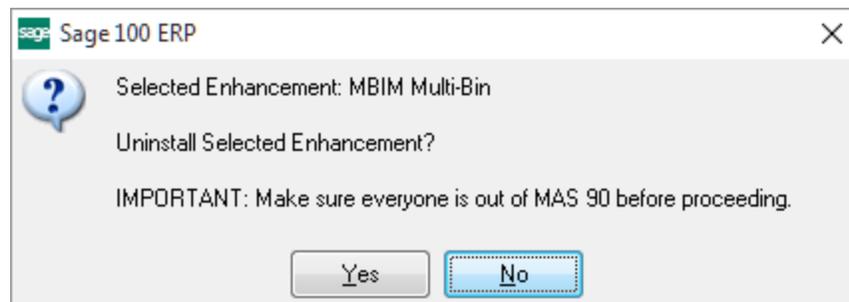
Field Name	Description	Type	Length
InvoiceNo	Invoice Number	String	7
ItemCode	Item Code	String	30
UpsellItemCode	Upsell Item Code	String	30
UpsellItemType	Upsell Item Type	String	1
UpsellValuation	Upsell Valuation	String	1
WarehouseCode	WarehouseCode	String	3
UnitOfMeasure	Unit of Measure	String	4
PriceLevel	PriceLevel	String	1
Select	Select	String	1
UnitOfMeasureConvFactor	Unit Of Measure Conversion	Number	
QuantityOrdered	Quantity Ordered	Number	
QuantityAvailable	Quantity Available	Number	
UnitPrice	Unit Price	Number	
UnitCode	Unit Cost	Number	
ExtensionAmt	Extension Amount	Number	

## 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.

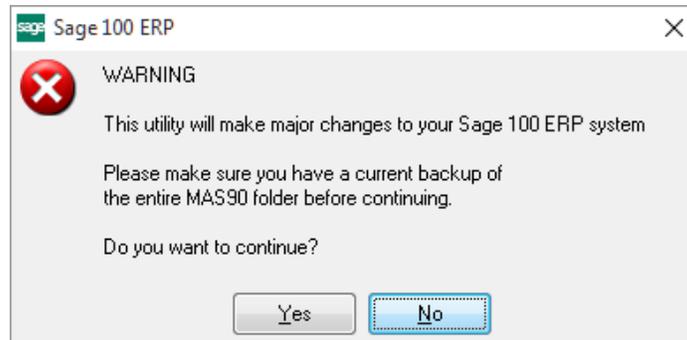


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



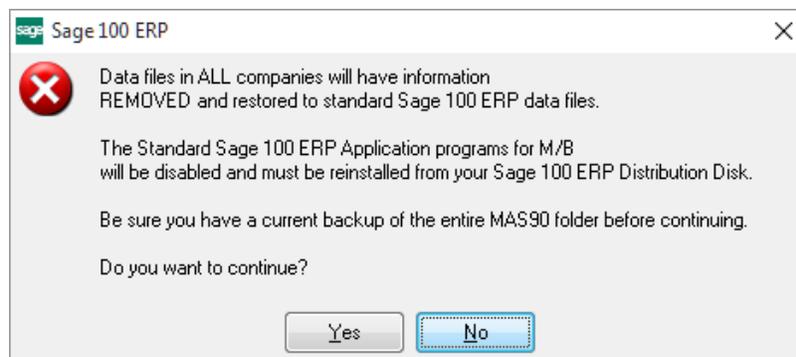
Select **No** to exit the Uninstall Process.  
Select **Yes** to continue with the Uninstall Process.

**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.

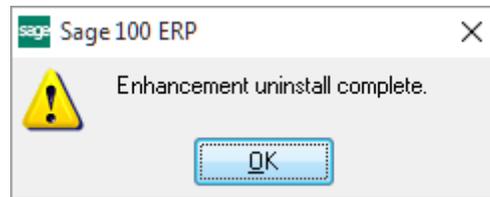
Select **No** to exit the Uninstall Process.  
Select **Yes** to continue with the Uninstall Process.

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).