



DSD Business Systems

Sage 100 Enhancements

S055

S/O Commissions by Line Item

SO-1055

Version 7.30



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S/O Commissions by Line Item User's Manual
Version 7.30

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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*

S055 S/O Commissions by Line Item:

<http://www.dsdinc.com/enhancement/so-commissions-by-line-item-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.*
- 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.

S/O Commissions by Line Item Features

This DSD Extended Solution to the Sales Order module allows commission rates to be overridden in Sales Order and S/O Invoice entry on a line item basis.

Additional functionality exists if DSD Extended Solution AR-1049, *Enhanced Salesperson Commission Report*, is also installed and enabled.

Section B: Getting Started

CAUTION

- **If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.**
- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.
- **Check with DSD before installing more than one Enhancement.**

Required Levels

Sage 100 Module	Module Required	Required Level
S/O	Y	7.30
A/R	Y	7.30

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.*

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.*

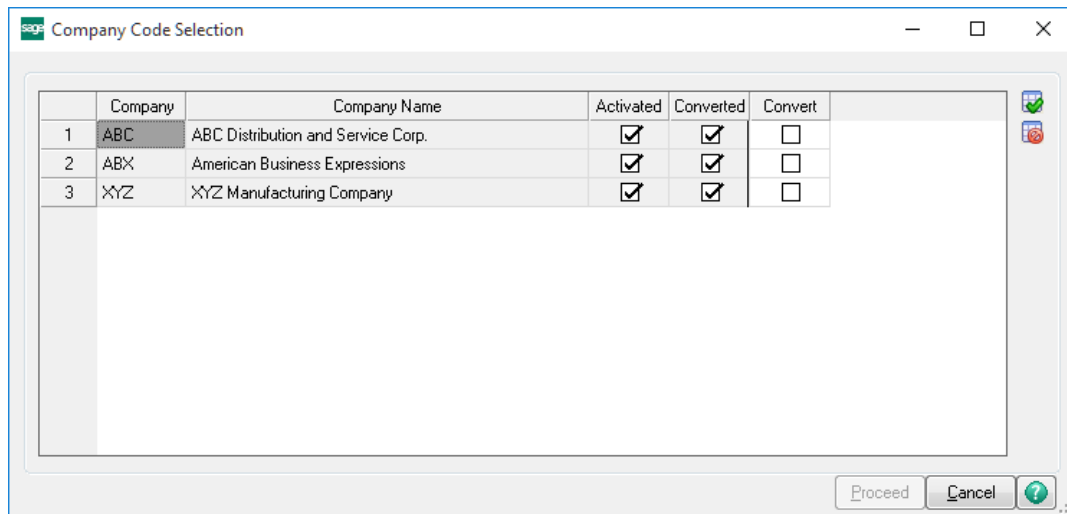
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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

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

The screenshot shows a dialog box titled "SO-1055 Setup Options" with a close button (X) in the top right corner. The main heading inside the dialog is "SO-1055 Commissions/Line Item". Below this heading is a form with the following options:

- Enable DSD Extended Solution Level 7.30
- Prompt For Line Commission Refresh
- Allow Edit of Line Level Commission Amounts
- Give Highest Priority
- Prioritize SO-1051 before Standard Commission

At the bottom right of the dialog are "Accept" and "Cancel" buttons. At the bottom left, there are labels for "DSD", "MFG", and "7/15/2024".

Answer the following prompts:

Prompt For Line Commission Refresh: Check this box to be prompted to refresh line commission rates whenever the standard commission rate on the totals screen is changed.

The following prompt is available if you have DSD Extended Solution AR-1049: *Enhanced Salesperson Commission Report* installed and enabled:

Allow Edit Of Line Commission Amounts: Check this box to allow the editing of Line Commission amounts in History. See Operations for more information.

Give Highest Priority: Check this box to give line commission rates precedence over all other commission structures.

Note: This will affect all DSD Extended Solutions dealing with Commission Rates in Sales Order.

The following prompt is available if you have DSD Extended Solution SO-1051: *Salesperson Commission by Product Line/Item* installed and enabled and have checked the '**Give Highest Priority**' box.

Prioritize SO-1051 before Standard Commission: Check this box to prioritize the SO-1051 Commission calculation before the Standard Sage Commission calculation.

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

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.


Starting with version 4.50, Sage 100 has a new Line Item Commission feature available on the Sales Order Setup menu which allows the user to setup a Line Commission, but not to override it in Sales Order Line Data Entry

Line Item Commissions can be set up for a combination of specific or 'all' Salespersons/Cust/Items, with a choice of the Commission Type Percent or Amount.


 Line Item Commission Maintenance (ABC) 2/5/2024 — □ ×


Salesperson No.    

Salesperson Name

Customer No. 


Customer Name

Item Code 


Effective Date 



Item Commission

Commission Method	<input type="text"/>
Commission Rate	0.000%
Base Commission	.00

Commission Type 

Commission Rate	0.000%
-----------------	--------



Records set up in this file will affect the Commission Percent that defaults on line items that are commissionable. Previously, the line defaulted the Override Commission checkbox as unchecked, and the Commission % to .00. It will now search for a record in the Line Item Commission file and automatically assign a Commission % if it finds one.

If the Type is set to Percent, it will default the checkbox to checked, and pull the appropriate Commission % assigned. The defaulted Commission % can be changed.

If the Type is set to Amount, it will default the checkbox as unchecked and show the header Com %. The Line Item Commission 'Amount' will print on the Gross Profit Journal.

The Effective Date will be the Order Date for orders, and the Invoice Date for invoices.

Section D: System Operations

Order Entry/Invoice Entry

The Order Entry's and Invoice Entry's primary grid has been modified with two additional fields: 'Override Commission' and 'Commission %'. The Commission Rate will default to the value which Sage 100 thinks should be used (Line Item Commission rate if it finds a record in the new Line Commission Rate file, Item, Salesperson or Ext Solution specific rate). If the Override Commission flag is checked, you will have access to override the default Commission %. If a Percent Type record has been found in the Line Commission Rate file, the Override Commission flag will be automatically checked and the appropriate Commission Rate will be pulled from the file.

Item Code	Ordered	Back Ordered	Unit Price	Extension	Override Commission	Commission %
1 1001-HON-H252	1.00	.00	100.000	100.00	<input checked="" type="checkbox"/>	10.000
2 1001-HON-H254	1.00	.00	131.000	131.00	<input type="checkbox"/>	10.000
3	.00	.00	.000	.00	<input type="checkbox"/>	0.000

Comment	
Description	HON 4 DRAWER LETTER FLE W/O LK
Warehouse	001
Unit Of Measure	EACH
Shipped	.00

Total Amount: 231.00

The standard 'Commissionable' checkbox, the SO-1055 'Override Commission' checkbox and the SO-1055 'Commission %' fields must all be in the same grid, either primary or secondary. You will need to move some of your fields in order for this Extended Solution to function.

If the Setup question 'Prompt For Line Commission Refresh' is checked, then the line's commission rates may be refreshed from the standard Commission Rate field on the Totals tab of Order Entry and Invoice Entry. You will be prompted to refresh the line commission rates when you change that value).

Sage 100

Do you want to refresh the line item commission rates with the value just entered?

Yes No Overrides

- If you answer 'Yes', the Override Rate for each line item subject to commission will be refreshed with the new value and the Override Commission Rate Flag will be checked.

- If you answer 'No', no changes will be made.
- If you answer 'Overrides', all line items with Override Commission Rate Flag checked will be refreshed with the new Commission Rate.

Shipping Data Entry

No changes have been made to Shipping Data Entry. This Extended Solution will create default commission records for any line that is added via the 'Alternate Items' option.

Sales Journal Update

During the S/O Journal Commission Calculation, **the commission rate stored on the line will be used to calculate the commission for that particular line.** The Sales Order Gross Profit Journal has been modified with an additional column: Commission Rate. It will print the line's Commission % from the Invoice. The Commission (Comm) Flag will be set as follows:

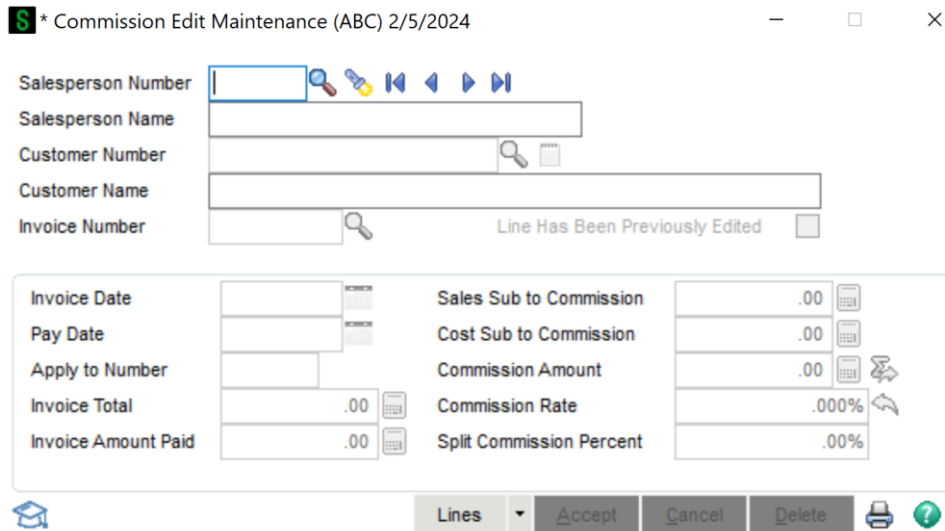
- If the item is not commissionable (the standard commissionable checkbox is not checked in data entry), then the Commission flag will be set to "No" per standard.
- If the commissionable flag is "Y" and SO-1055 override flag is "N," then the gross profit commission field will be set to "Yes".
- If the commissionable flag is "Y" and the override flag from SO-1055 is also "Y," then that field on the gross profit journal will be set to "Override" instead.

Sales Order Gross Profit Journal										
Journal Posting Date: 10/11/2010										
Register Number: SO-000007										
Salesperson No: 01-0100 Jim Kentley										
* = Price Change										
* = Cost Change From RMA										
Invoice Number	Invoice Date	Order Number	Commission Rate	Net Sales Amount	COGS Amount	Gross Profit Amount	Profit Percent	Comm	Commission Amount	Invoice Total
0100056 - IN	10/11/2010									
	1001-HON-H252			781.20	342.50	438.70	56.16%	No	0.00	
	SALES ACCT: 400-01-02									
	COGS ACCT: 450-01-02									
	1001-HON-H252LK		12.00	809.10	371.50	437.60	54.08%	Yes	97.09	
	SALES ACCT: 400-01-02									
	COGS ACCT: 450-01-02									
	6655		15.00	895.00	406.25	488.75	54.61%	Override	134.25	
	SALES ACCT: 400-01-02									
	COGS ACCT: 450-01-02									
	Sales Subject To Commission:			1,704.10	777.75	926.35	54.36%		231.34	
	Net Invoice Total:			2,485.30	1,120.25	1,365.05	54.92%			2,485.30
0100057 - IN	10/11/2010	0000182								
	1001-HON-H252		4.00	781.20	342.50	438.70	56.16%	Override	31.25	
	SALES ACCT: 400-01-02									
	COGS ACCT: 450-01-02									
	6655		5.00	895.00	406.25	488.75	54.61%	Override	44.75	
	SALES ACCT: 400-01-02									
	COGS ACCT: 450-01-02									
	Sales Subject To Commission:			1,676.20	748.75	927.45	55.33%		76.00	
	Net Invoice Total:			1,676.20	748.75	927.45	55.33%			1,676.20
Salesperson 01-0100 Total:				3,380.30	1,526.50	1,853.80	54.84%		307.34	
Net Invoice Total:				4,161.50	1,869.00	2,292.50	55.09%			4,161.50
Report Total:				3,380.30	1,526.50	1,853.80	54.84%		307.34	
Net Invoice Total:				4,161.50	1,869.00	2,292.50	55.09%			4,161.50

Commission Edit Maintenance

If you have AR-1049: *Enhanced Salesperson Commission Report* installed and enabled and you checked 'Allow Edit Of Line Commission Amounts' in Setup, A/R Commission Edit Maintenance will be modified as follows:

There will be a new 'Line' button on the Commission Edit Maintenance screen.



When you click this button, Line Level Commission Edit will pop up allowing you to query each commissionable line on the Invoice. You will be allowed to modify the percentage.

Line Level Commission Edit

Line	Item Number	Description	Commission Pct

OK Cancel

As you exit Line Level Commission Edit, this Extended Solution will recalculate the Invoice's Commission Amount and will update A/R Invoice History.

Access to the 'Commission Amount' field will be prohibited and the 'Recalc' and 'Default' buttons will be disabled.

Helpful Hints

- During Sales Order Commission Calculation, if the Commission Method is set by Inventory Item and the Inventory Item Commission Method is set to 'None', then the Commission Amount for that Line Item will be zero. This is true even if you overrode the Commission on the line.

ODBC Dictionary

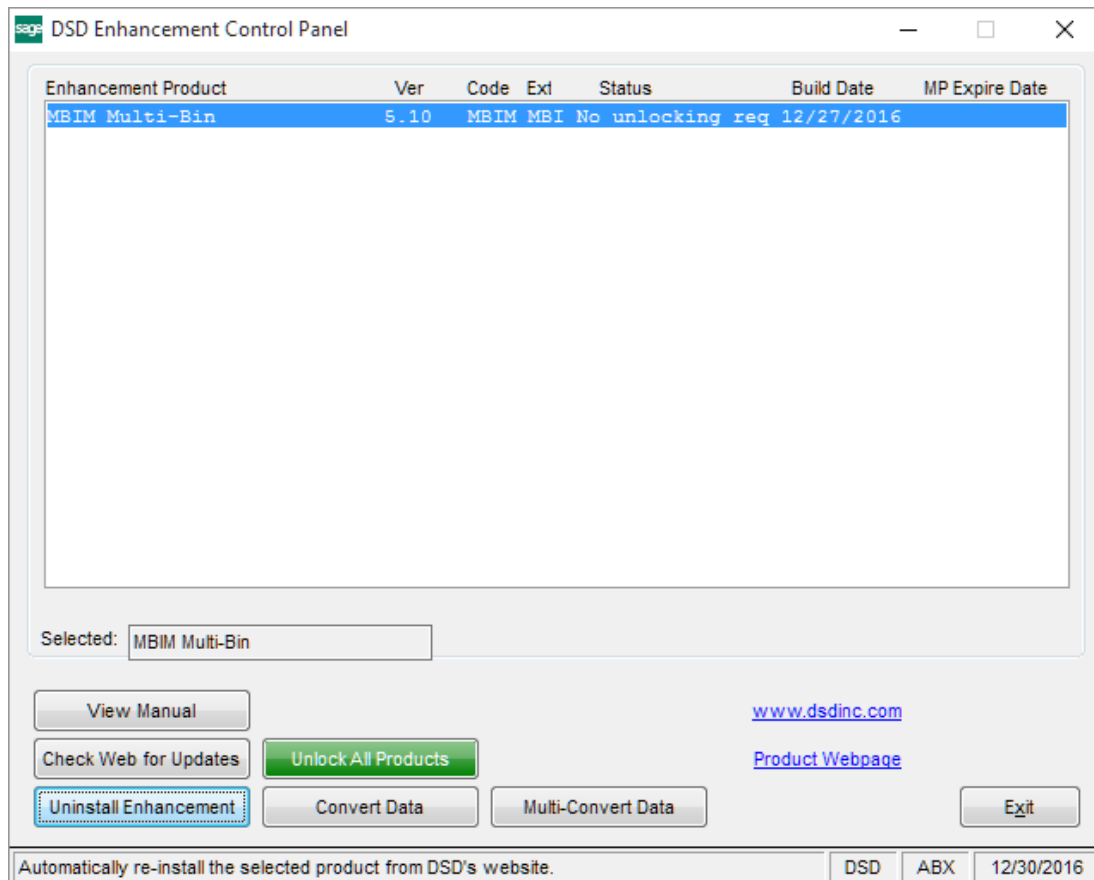
The files listed below have been added or changed in the ODBC Dictionaries by this Extended Solution for Crystal Reports purposes.

<i>File:</i>	<i>Description Fields:</i>
SO_SalesOrderDetail	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_SalesOrderWrk	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_InvoiceDetail	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_InvoiceWrk	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_SalesOrderHistoryDetail	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_SalesOrderQuoteHistoryWrk	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
AR_InvoiceHistoryDetail	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
AR_InvoiceHistoryWrk	OverrideCommissionRate_001\$ LineCommissionRateOverride_001
SO_GrossProfitJournalWrk	LineCommissionRate_001

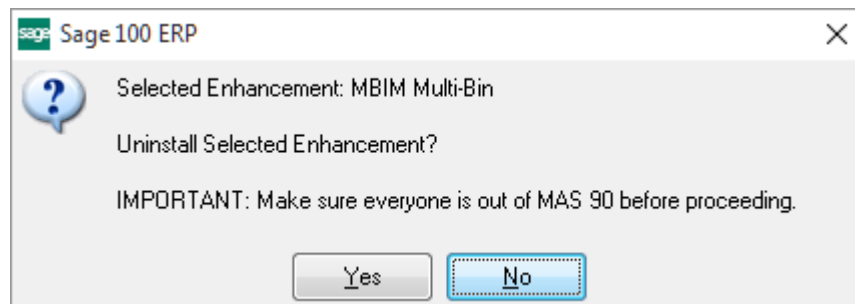
Be aware that the ODBC Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

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.

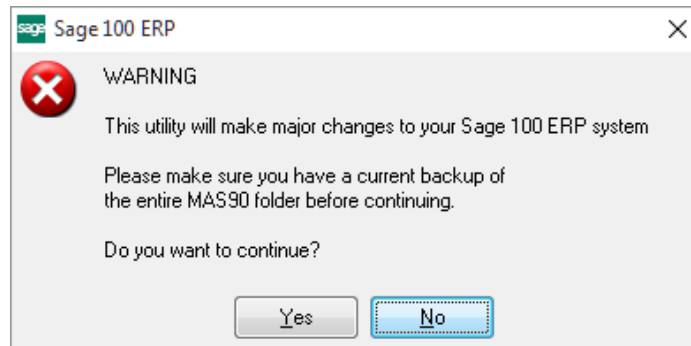


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



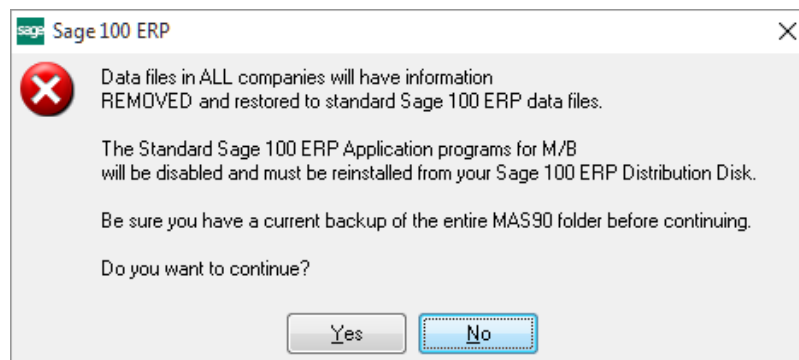
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

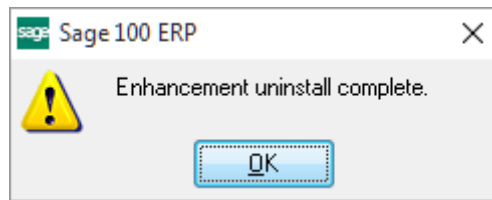
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).