DSD Business Systems

Sage 100 Enhancements

S473

Delivery Scheduling for Sales Orders

SO-1473

Version 7.30

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Delivery Scheduling for Sales Orders User's Manual
Version 7.30

28 August, 2024

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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Table of Contents

SECTION A: INTRODUCTION 4

Web Resources 4
Support 4
Delivery Scheduling for Sales Orders Features 5

SECTION B: GETTING STARTED 6

Required Levels 6
Installation 6
DSD Enhancement Control Panel 8

SECTION C: SETUP 10

SECTION D: SYSTEM OPERATIONS 12

SECTION E: UNINSTALL DSD ENHANCEMENTS 21

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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

S473 Delivery Scheduling for Sales Orders:

http://www.dsdinc.com/enh/pages/S473.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:

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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.

Delivery Scheduling for Sales Orders Features

This DSD Extended Solution allows you to establish delivery calendars for trucks. These calendars will hold the specific days of the week which are available for delivery as well as the maximum number of deliveries allowed per day. Each calendar's delivery area is restricted by Zip Code. A master user is allowed to override this restriction.

This Extended Solution also ships a Scheduling Maintenance program that allows you to assign entire sales orders or individual lines from sales orders as:

- Customer Pick Up
- Scheduled for Delivery
- Approximate Scheduled Date of Delivery

Custom Office UDFs are used to track which User Code scheduled a line of an order and on what date as well as what the last User Code was to make a change to that scheduling and on what date.

Scheduling Dates are stored in the Sales Order line's Promise Date field thereby disabling Promise Dates for any other use.

The Custom Office module must be 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**	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.

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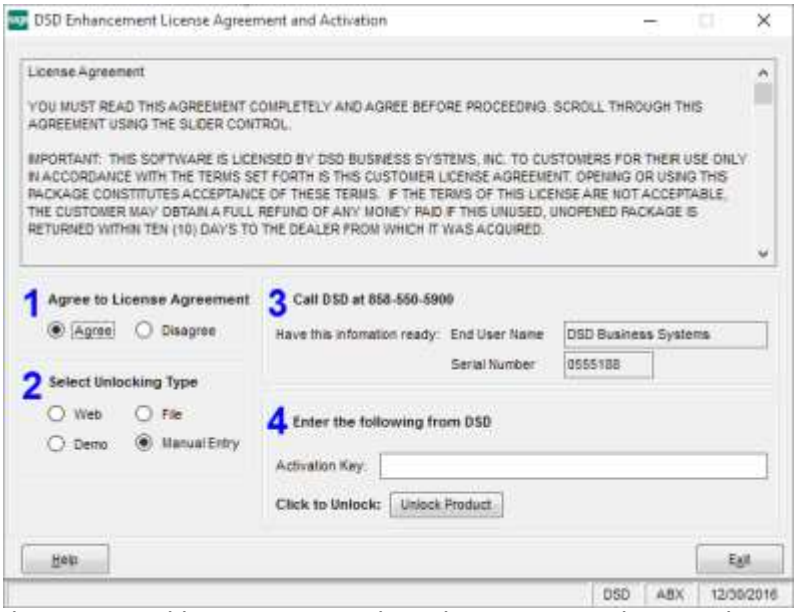
Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from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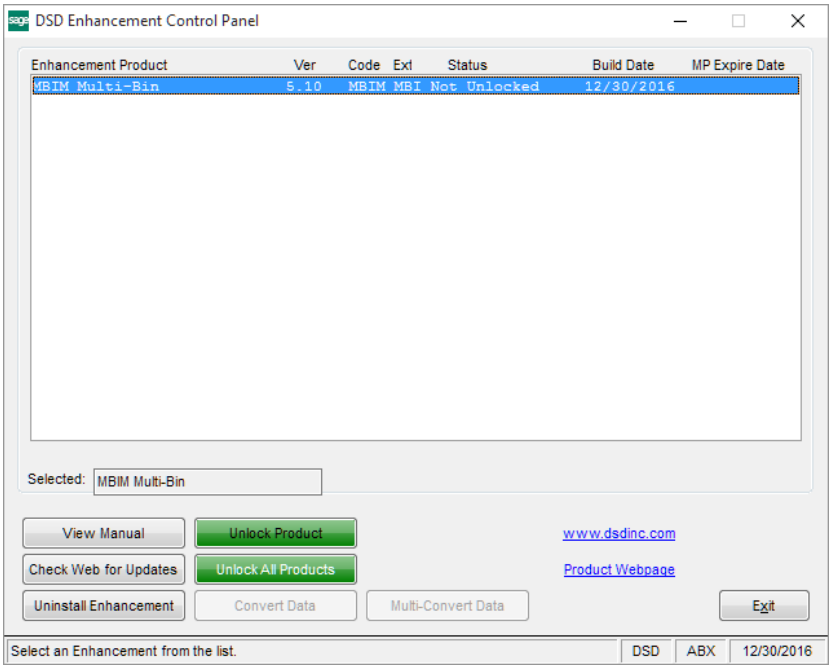
DSD Enhancement Control Panel

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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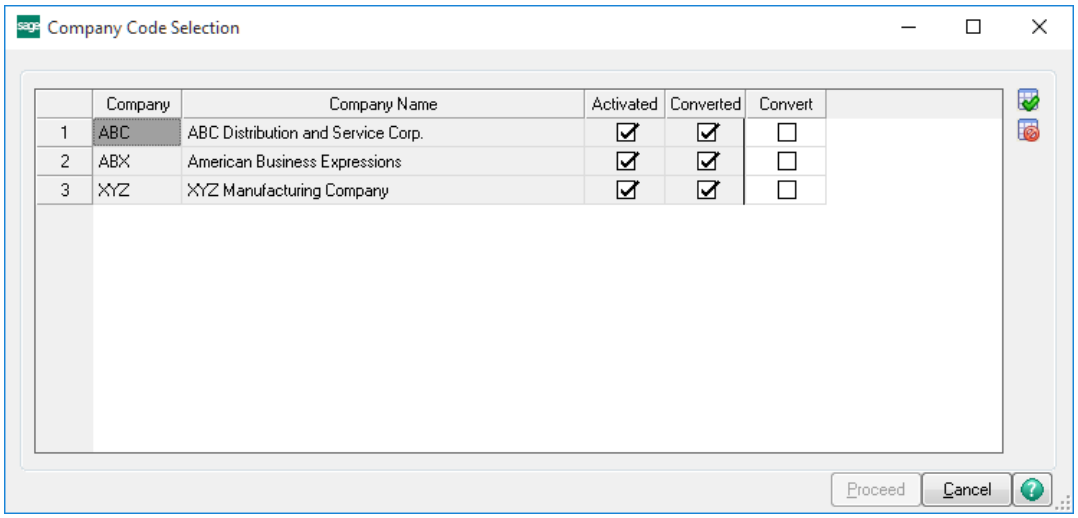
Multi-Convert Data: Multiple Companies can be converted at the same time for a given Enhancement. (*If you have a large number of Companies to convert, please do in batches of 20 or fewer due to memory limitations.)*



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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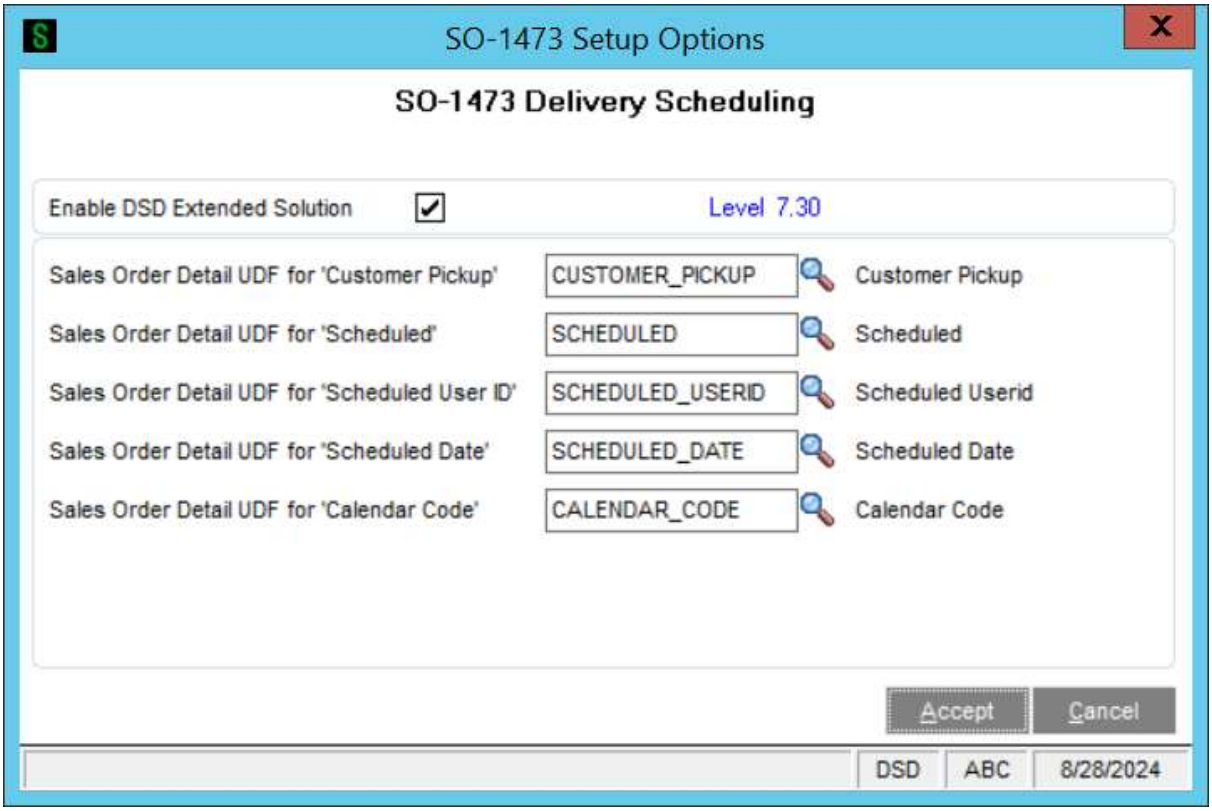
Section C: Setup

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:

S/O Line UDF for 'Customer Pickup': Enter the checkbox type UDF that will be used to signify 'Customer Pickup'.

S/O Line UDF for 'Scheduled': Enter the checkbox type UDF that will be used to signify 'Scheduled'.

S/O Line UDF for 'Scheduled User ID': Enter the uppercase multi-line type UDF that holds the 'User Code' of the user who scheduled the delivery. This must be at least 3 characters in length.

S/O Line UDF for 'Scheduled Date': Enter the multi-line date type UDF that holds the Sales Order system date stamp of when the delivery was scheduled.

S/O Line UDF for 'Calendar Code': Enter the 1 character multi-line string type UDF that holds the Calendar Code. If you plan to use lower case Calendar Code, do not set up the UDF as uppercase.

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

Role Maintenance

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The following Tasks have been added to Sales Order, Setup**:**

- DSD Extended Solutions Setup
- Delivery Calendar Maintenance
- Delivery Zip Code Maintenance
- Delivery Schedule Maintenance

The following Task has been added to Sales Order, Inquiries**:**

- Delivery Schedule Inquiry

The following Task has been added to Sales Order, Utilities**:**

- Purge Expired Delivery Schedule

The following Security Events have been added to Sales Order**:**

- Allow to Schedule Deliveries When Not defined in Zip Code Maintenance
- Allow to Schedule Deliveries When Delivery Status shows 'Full'

Users who are authorized to run any of the above should be granted permissions for the prospective tasks and security events. Please review your security setup in Role Maintenance and make appropriate changes.

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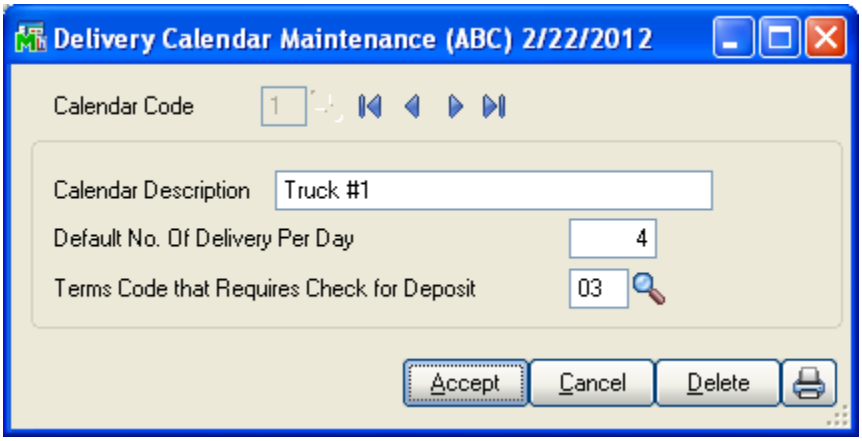
Section D: System Operations

You can set up the details for each Calendar Code.



Answer the following prompts:

Calendar Code: Enter the single character alpha-numeric Calendar Code.

Calendar Description: Enter a description for this calendar.

Default No. of Delivery Per Day: Enter the number of deliveries to be used as the default when creating new records in Scheduling Maintenance.

Terms Code that requires check for Deposit: Enter the Terms Code that signals a deposit is required.

Delivery Zip Code Maintenance

You can maintain a list of 5-character Zip Codes for each Calendar Code. This list will control which orders can be scheduled by any users (those with a Ship To Zip Code on this list) and which orders can only be scheduled only by users who have the appropriate security rights.

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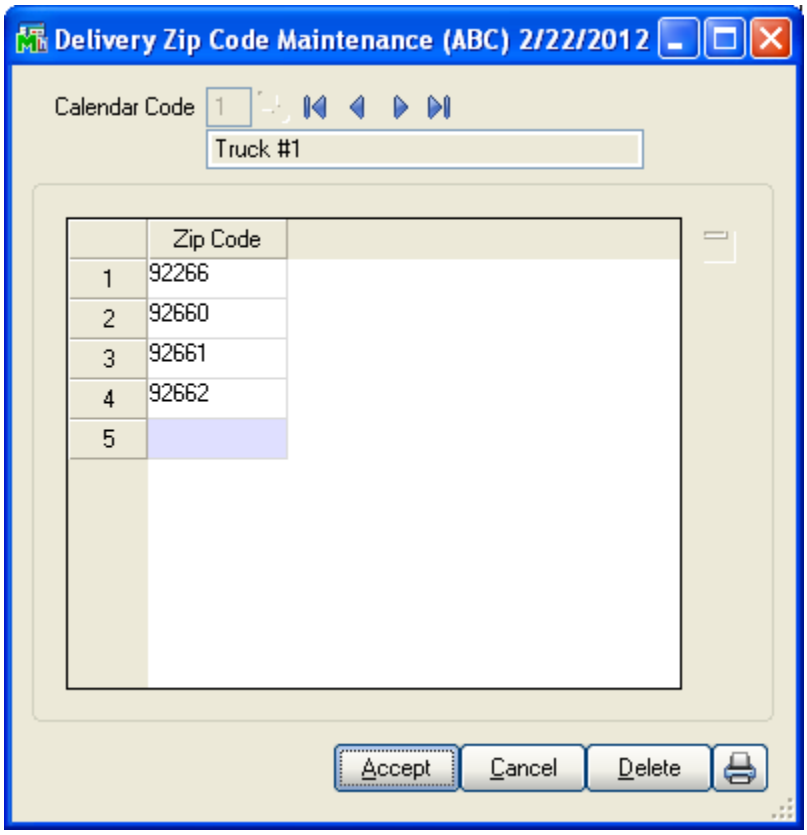

Delivery Schedule Maintenance & Inquiry

When Delivery Schedule Maintenance is accessed, you will be prompted for the following:

Calendar Code: Select a Calendar Code.

Delivery Date: Enter a date.

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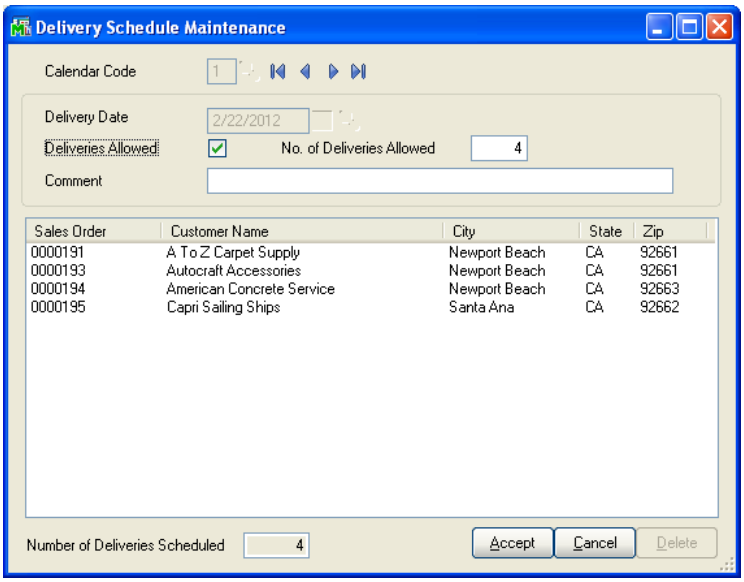
Deliveries Allowed: Check this box to show that deliveries are allowed.

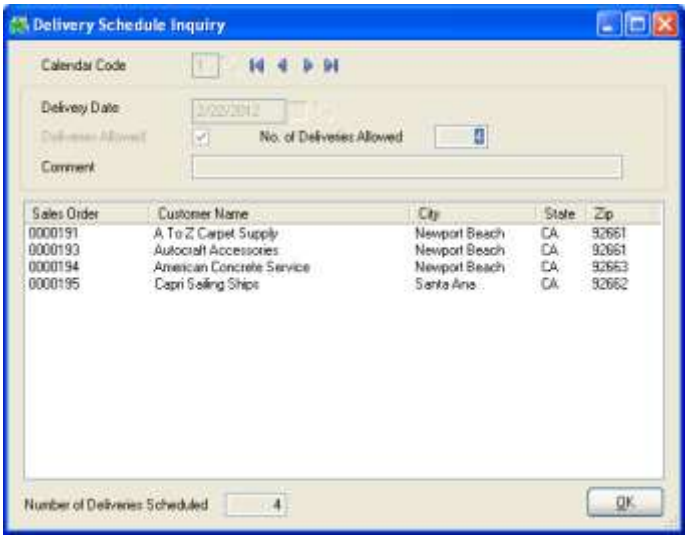
Number of Deliveries Allowed: Will default to the quantity specified but can be overridden.

Comment: User defined 50-character comment.



Any deliveries scheduled for that day will be displayed in the list box but cannot be modified within this screen. The total number of Deliveries (Sales Orders) scheduled will be displayed at the bottom of the screen.

Scheduling Inquiry will display all of the same fields as Scheduling Maintenance, but no changes to the setup of the date will be allowed.



Sales Order Entry

When new order line is added either manually or by copying another order, the line promise date is set to blank. Therefore, it has a status of 'unscheduled'.

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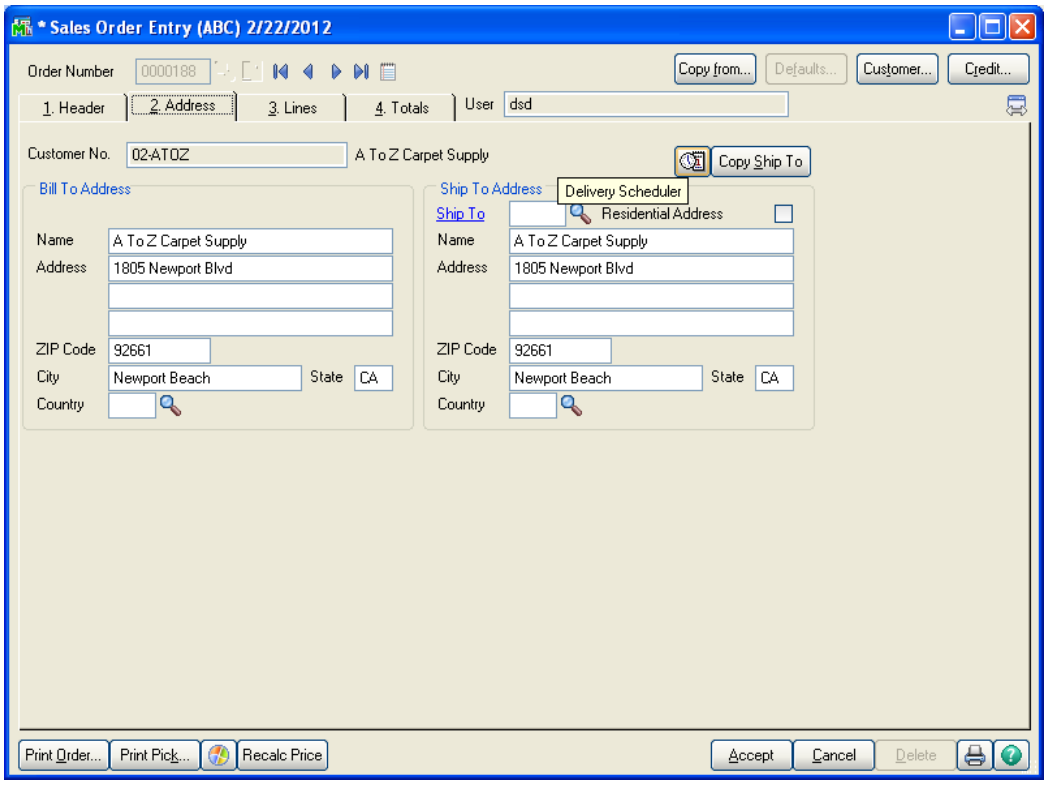
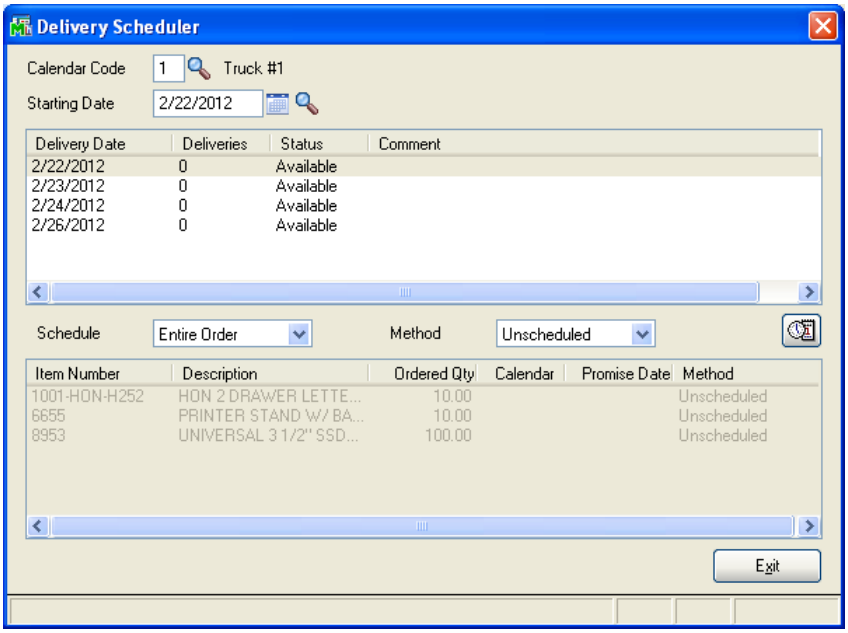


-

A new 'Delivery Scheduler' button has been added to the Address and Totals tab of Sales Order Entry.

In Delivery Scheduler, enter a Calendar Code.



Beginning with the sales order's date, the Scheduler will list all Dates setup in Delivery Schedule Maintenance as 'Allowed' to schedule in a scrolling list. For each date you can see how many deliveries are currently scheduled, whether that date is considered full or available, and the comment from Delivery Schedule Maintenance.

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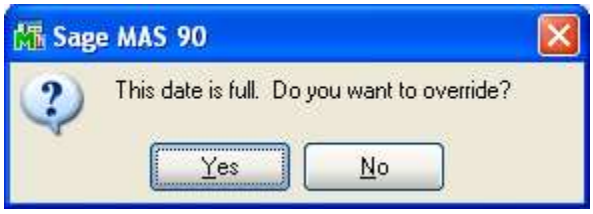
- A date is considered 'Full' when the number of deliveries scheduled is greater than or equal to the number of deliveries allowed.
- A date is considered 'Available' if the number of deliveries scheduled is less than the number of deliveries allowed.

You can type in a date and be taken to that place in the list. If the Delivery Date has not been defined in Delivery Schedule Maintenance, you will be warned 'Invalid Delivery Date'. If the Delivery Date is defined in Delivery Schedule Maintenance but its Allowed flag is unchecked, then you will be warned: 'Delivery not allowed on this date'. If the date is full, a warning will be presented. Users with security rights to schedule deliveries on dates that are full will not receive this warning. They can also override this warning for other users.



If no Item lines exist on the Order, the only option will be to 'Exit' the Scheduler. If there are Item lines on the order, then you will be able to select a date from the list and have access to the following prompts:

Schedule:	Entire Order By Line
Method:	Scheduled Approximate Customer Pick Up Unscheduled

Select 'Entire Order' to schedule all lines simultaneously or 'By Line' to schedule one line at a time.

Select the appropriate method, then **click the 'Apply to Schedule' button** **to update changes to the lines.**

If method '**Scheduled**' is selected, then the program will:

- set line Promised Date to the selected date
- set Scheduled UDF to Checked
- make an entry in the firm delivery file and increment/decrement the status

If method '**Approximate**' is selected, then the program will:

- set line Promised Date to the selected date
- set Scheduled UDF to unchecked

If method **'Customer Pick Up**' is selected, then the program will:

- set line Promised Date to the selected date

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- set 'Custom Pick Up' UDF to checked
- set Scheduled UDF to unchecked

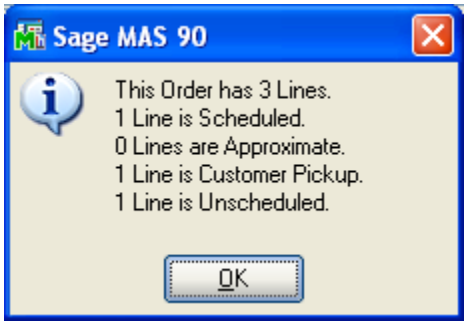
If method '**Unscheduled**' is selected, then the program will:

- set line Promised Date to blank
- set 'Custom Pick Up' UDF to unchecked
- set 'Scheduled' UDF to unchecked

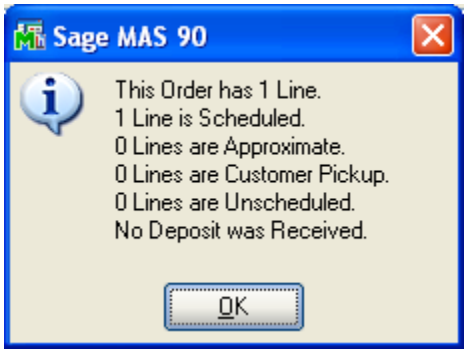
If you need to change the calendar code or delivery date on a line or change the method from 'Scheduled' to a different method, you need to unschedule the line first.

As a line is scheduled, or its Scheduling is changed, that User's ID will be written to the 'Scheduled ID' UDF and the workstation's date will then populate the 'Scheduled Date' UDF. This will take place each time a user modifies the line, therefore it will only reflect the last person who changed it.

As you Accept (or Quick Print) the Order, a pop-up window will appear telling you how many total non-comment lines are on the order, how many of those are scheduled, how many are approximate, how many are customer pickup and how many are unscheduled.



If the Terms Code on the Sales Order matches the 'Terms Code that requires Check for Deposit' specified in Delivery Calendar Maintenance and the deposit amount is zero, then there will also be a line in the pop-up window that says 'No deposit was received"



Changing the Item Number on a line will have the same effect as deleting the line. Therefore, you will need to re-schedule the line.

If you attempt to change the Promise Date in the sales order line entry grid, you will be warned and your change will not take effect.

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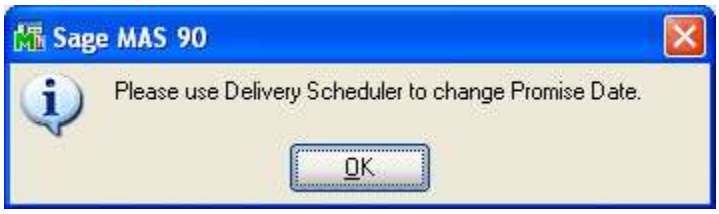
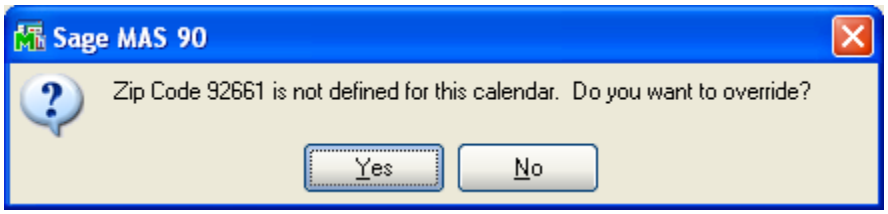


If you change the delivery date on an existing sales order line, the number of deliveries for the old delivery date will not decrease until you accept the sales order. If that date was full, another user cannot use the opening you have just made available until you leave your sales order. This is necessary to support the Cancel feature in sales order entry. If you click the Cancel button to leave your sales order, your scheduling changes will be cancelled as well.

If the Ship To Zip Code is not defined for the Calendar Code entered, a warning will be presented.



Users with security rights to schedule deliveries not defined in zip code maintenance will not receive this warning. They can also override this warning for other users.

Utilities

A Purge Expired Delivery Schedules utility has been added to the Utilities menu. All records with a date prior to the one defined in the specified Calendar code will be deleted from the Delivery Schedule file.

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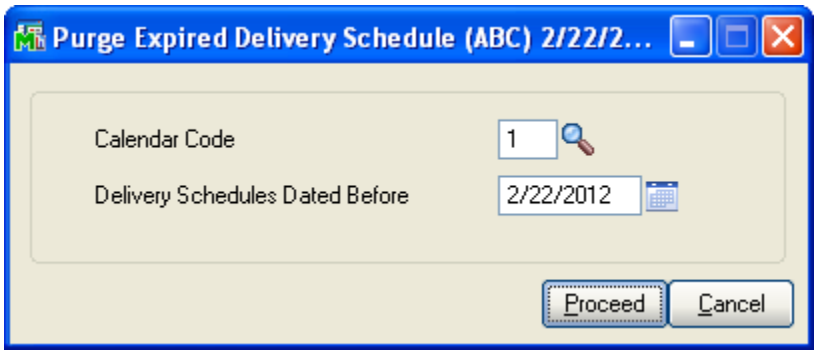

You will receive a warning if there are Sales Orders scheduled for Delivery Dates within the date range to be purged.

Inventory Maintenance and Inquiry

The Sales Order Inquiry display on the Inquiry Tab has been modified as follows:

- the Order Date column has been replaced by Scheduled Date (ie. line Promise Date)
- the Order Type column now displays the line's Scheduled Method using the following abbreviations
  - SCH = Scheduled
  - APP = Approximate
  - CPU = Customer Pick Up
  - UNS = Unscheduled
- lines are sorted in ascending order by Promise Date

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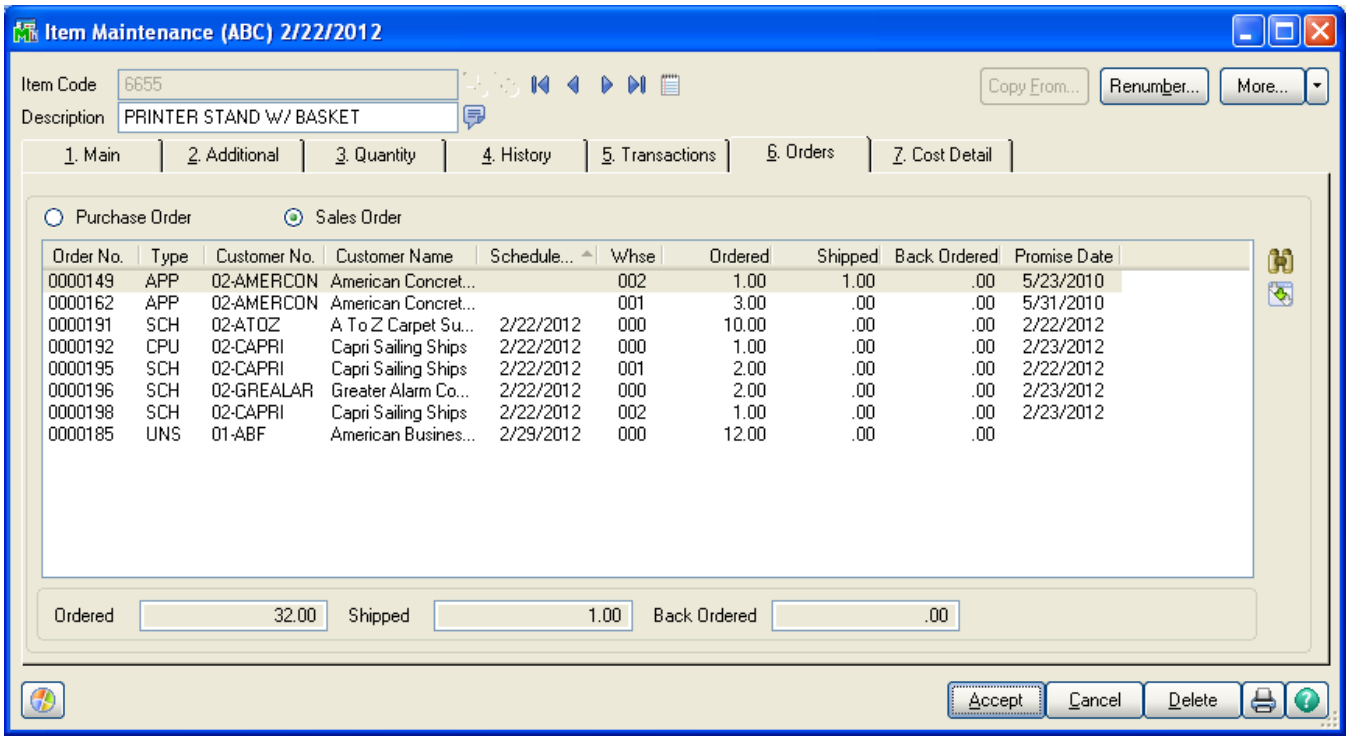

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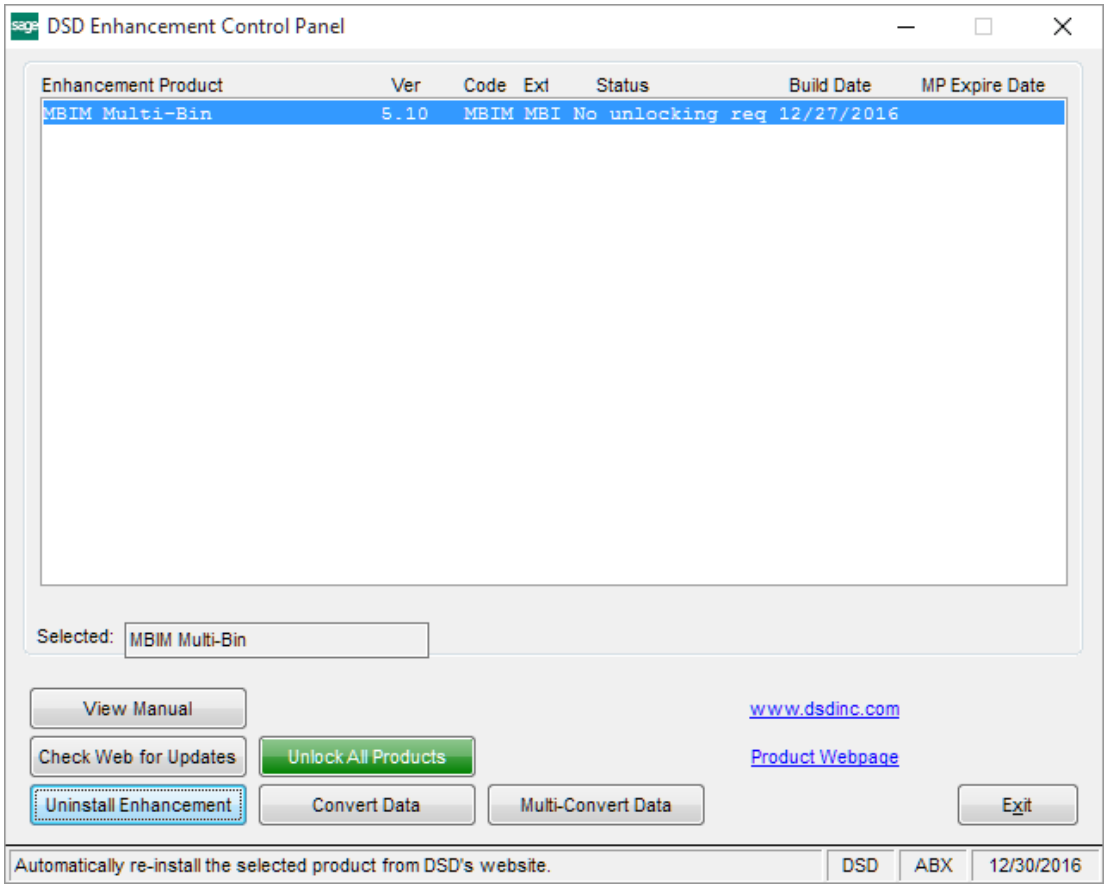
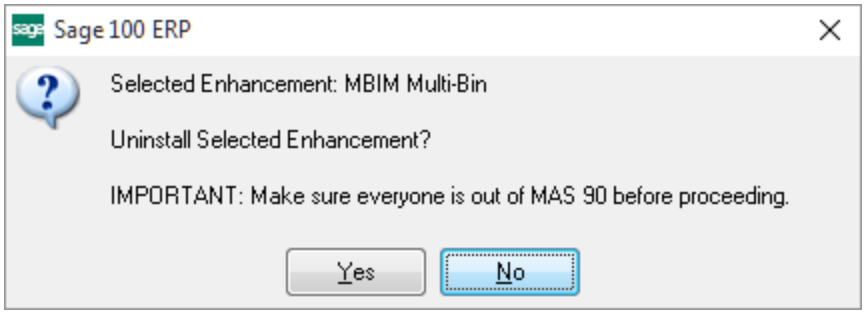
Section E: Uninstall DSD Enhancements

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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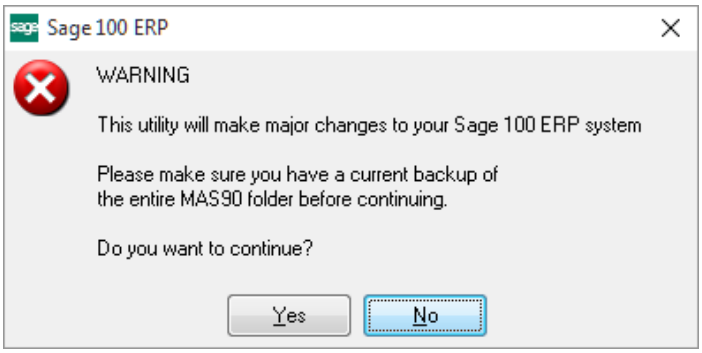
The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.



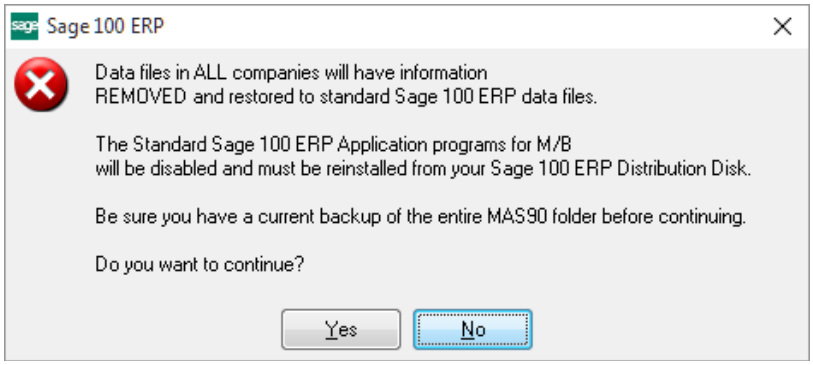
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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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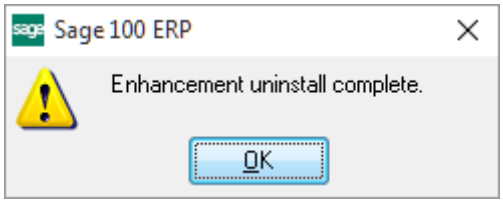

Now that the Uninstall process is completed, you must:

- 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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