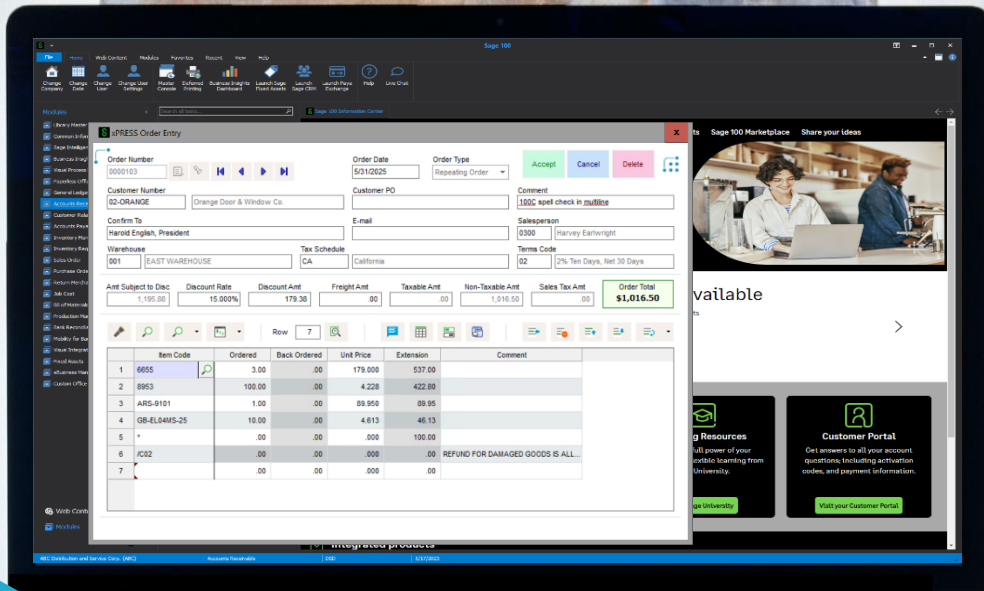


Sage



DSD BUSINESS SYSTEMS

SAGE 100 ENHANCEMENTS

SOEX

XPRESS SALES ORDER ENTRY

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xPRESS Sales Order Entry

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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.

xPRESS Suite

This DSD xPRESS Suite of enhancements is designed to take advantage of the Internet and allow for anytime/anywhere access of specific applications when used in conjunction with the Sage Provisioning Portal (SPP). The xPRESS Suite is not limited to just SPP customers, though. The customized screens make the Suite applications ideal for touch screen entry. Other users may prefer the simplified screens for data entry.



Note: The ability to use iOS and Android devices requires the use of the Sage Provisioning Portal, specifically running in Browser Mode. Windows devices can use the xPRESS Suite products in any environment and are not dependent on the Sage Provisioning Portal.

One of the key features of the DSD xPRESS Suite is that the code is still running in Sage 100, so all customizations, modifications and enhancements from third-party Tech Partners can still run in the xPRESS Suite programs. Some third-party enhancements may require customizations from DSD to support new fields and/or logic.

xPRESS Sales Order Entry

The xPRESS Sales Order Entry program is designed to supplement Sales Order Entry particularly for users who want to create orders through a mobile or touchscreen device. It is not intended to fully replace all the functionality found in the Sales Order program. The idea behind xPRESS Sales Order Entry is to provide the core functionality of Sales Order so that mobile salespeople can create orders at customer's sites, or wherever is convenient, but could then be edited and updated back at the home office through the standard Sales Order Entry program. Certain fields and controls may be read-only and not editable from within xPRESS Sales Order Entry. On-the-fly entry of new fields (e.g. Terms Codes, Salesperson Code, etc.) are not available in the xPRESS Suite.

Section B: Getting Started



Important – Read this section prior to installing this enhancement.

Updated Modules

This enhancement modifies several Sage 100 modules. If you reinstall one of the Sage 100 modules listed in the following table, you must also reinstall this enhancement. **Enhancements from different Sage Tech Partners may not be designed to work together.**

Module	P182
Library Master	✓
Sales Order	✓
Accounts Receivable	✓
Inventory Management	✓

If you are upgrading Sage 100 with a Product Update, check the DSD website for compatibility before upgrading. A new version of the enhancement may be required.

If you are upgrading Sage 100 to a new version (e.g., 2021 to 2023), you must obtain the latest compatible release from the DSD website prior to installing and converting.

Ensure the compatibility of all enhancements with the version being upgraded to prior to starting the installation process. Work with your reseller to ensure that enhancements are compatible with each other and note the proper order in which they should be installed.

Installation

Back-up: Exit all Sage 100 sessions. Back-up existing Sage 100 data.

Check Levels: Sage 100 module levels must match those listed above.

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.

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.

Re-Start Sage 100: Sage 100 will be updated.

Update Security: After installation, you may not see the modules you installed on the Launcher menu. You will need to update all your security Roles to include access to the newly installed modules. Make sure your user has sufficient rights to modify Role Maintenance and add access to the new DSD enhancements to the appropriate Roles.



If this is your first DSD enhancement, make sure to add the DSD Enhancement Control Panel in the Library Master module to an appropriate Role.

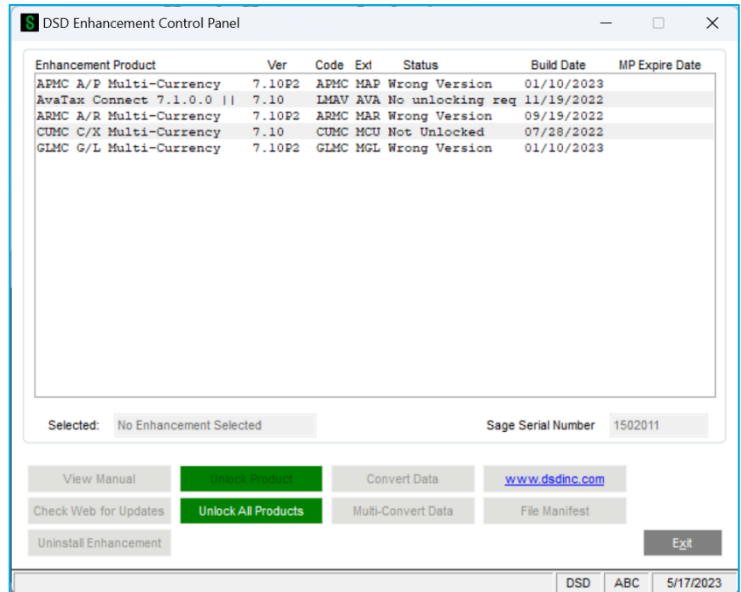
Run the DSD Enhancement Control Panel: Run the DSD Enhancement Control Panel from the Library Master module under the Utilities menu.

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.

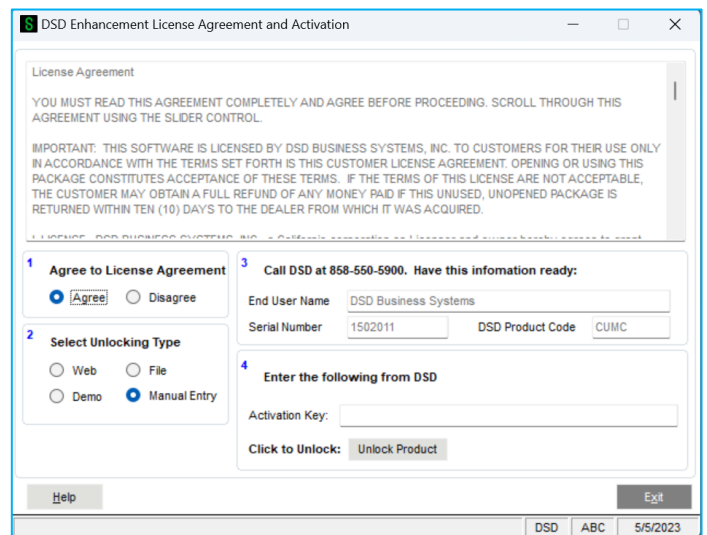
The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired 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. 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. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*




Agree to the License Agreement: On the DSD Enhancement License Agreement and Activation window, click on the Agree button to accept the DSD License Agreement. 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 licensing program will attempt to download encrypted serial number key file from DSD **and then proceed to unlock all enhancements contained in the file.**

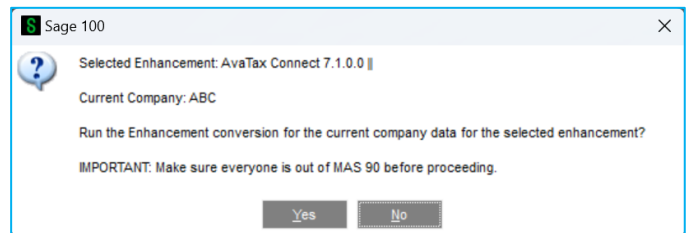
Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

 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.

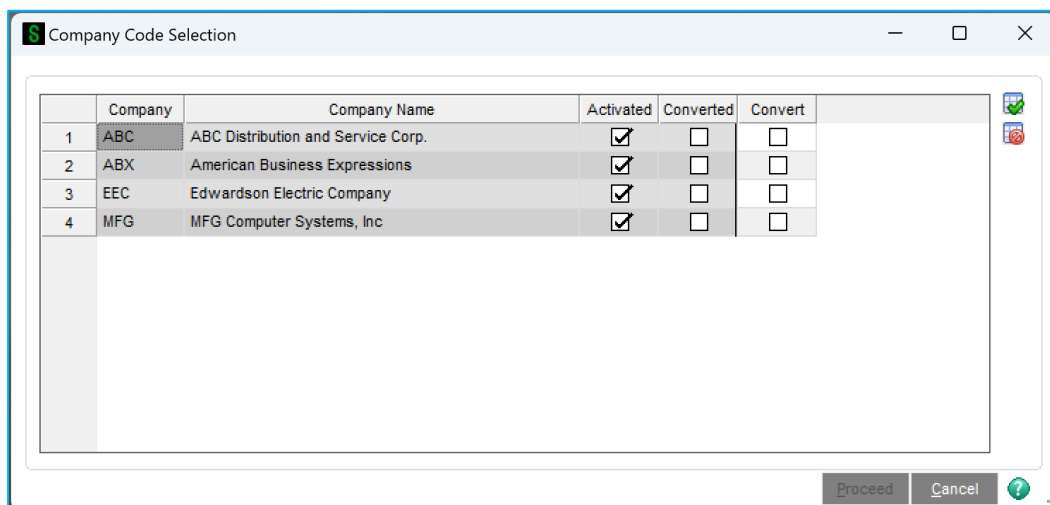
Manual Entry Unlock: If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

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

Once the SOEX module has been installed, registered and converted, it is ready to use when launched from the Sage 100 Launcher. You can also set up a shortcut to the program to launch it from the Windows desktop or from the Sage Provisioning Portal's landing page.

Creating a Windows Shortcut

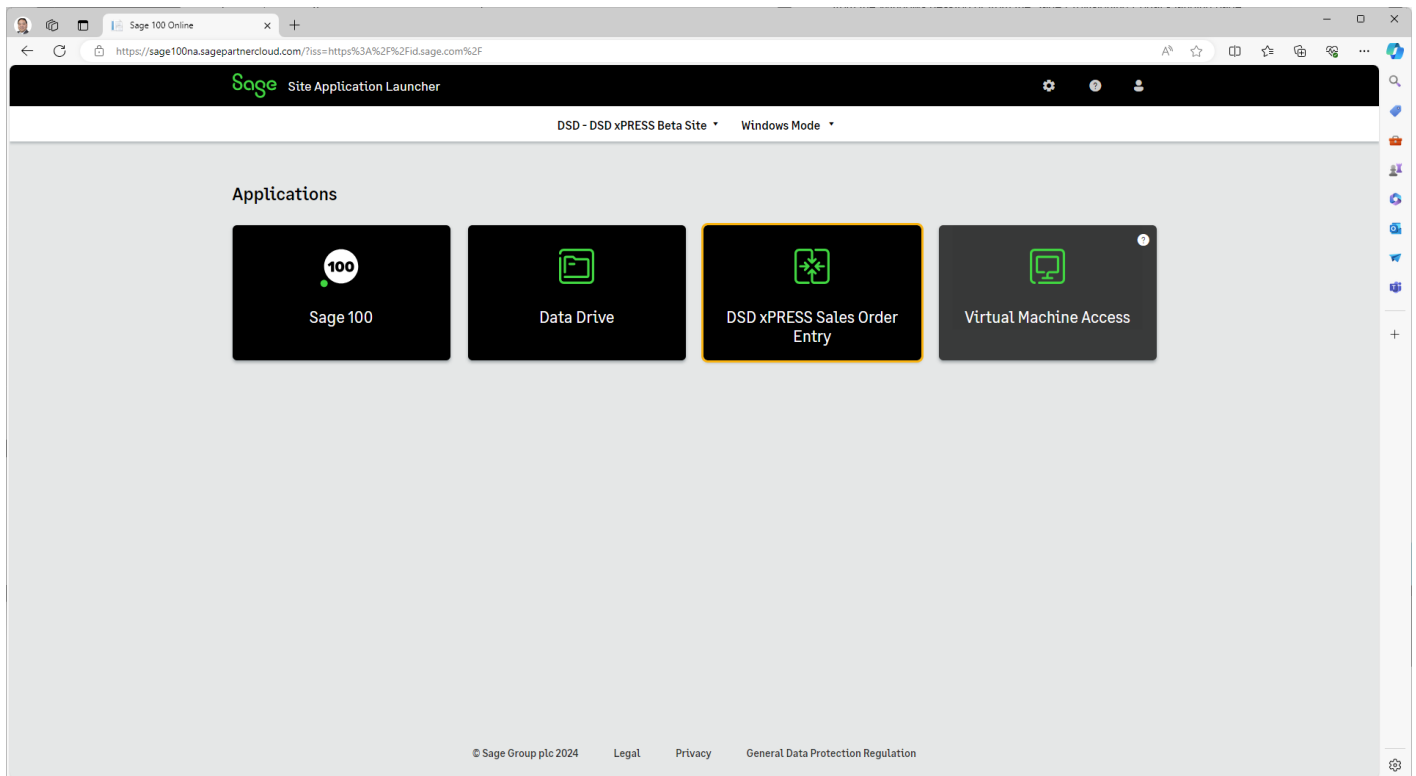
A Windows shortcut can be created to launch the xPRESS Sales Order Entry program from the Windows desktop rather than having to go through the Sage 100 Launcher. The shortcut bypasses the user login, company selection and module date dialogs by encoding this information in the arguments used to launch the program. The module date will be automatically set to the Windows system date when the program starts. Follow the instructions in the Sage 100 User Guide for setting up this shortcut. The new program to launch is "**SO234_SOEXSalesOrderStartup**." An example of the shortcut properties is shown here.

The shortcut must include the user login, user password and company code. If Sage 100 is configured to use Windows Logon, you can set the user login and password to "noID" and "noPW." In this case, the system will log in with the current Windows user login, assuming this user has been configured into Sage 100 as a valid user.

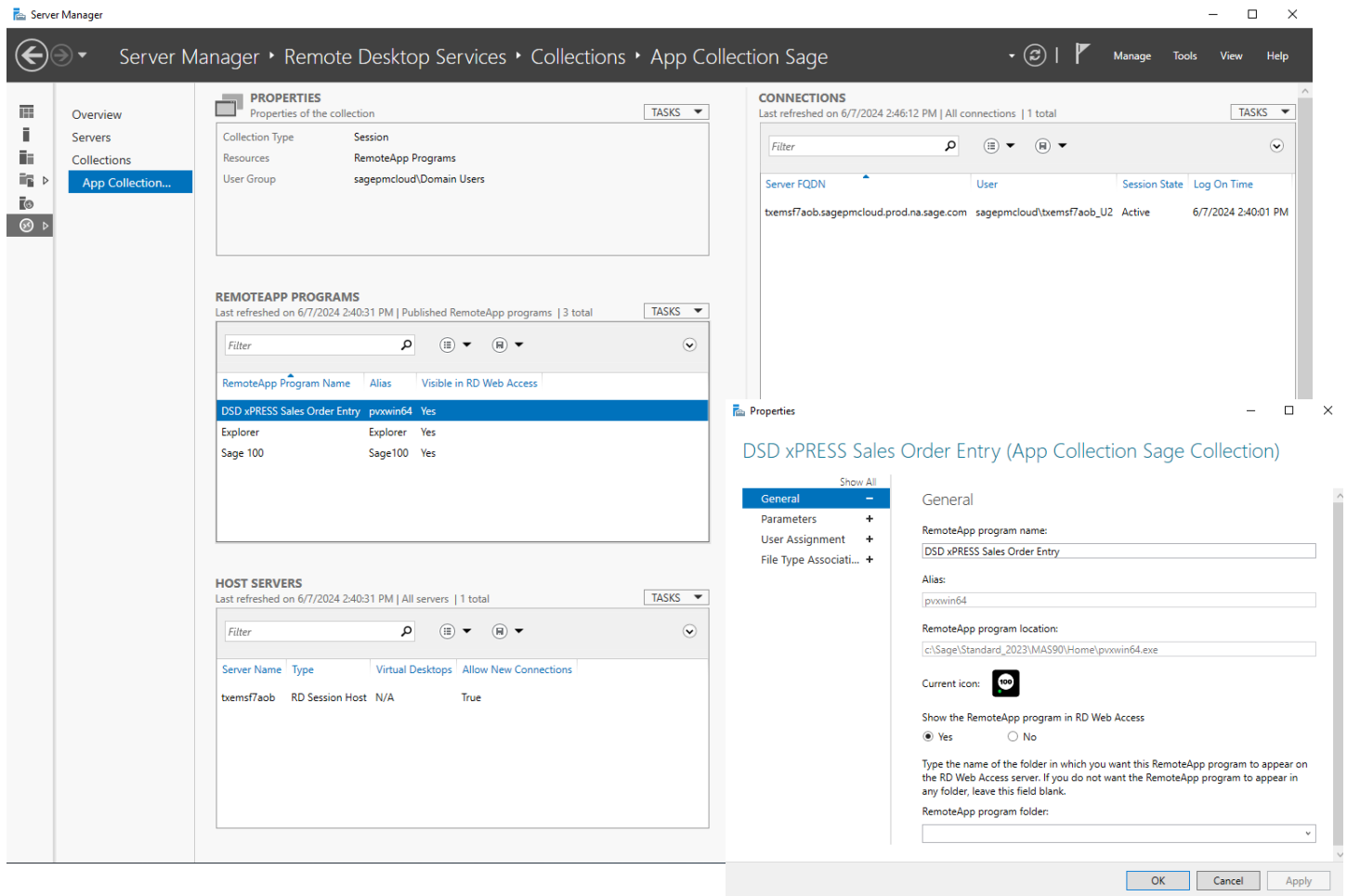
The company code must also be specified as a parameter in the shortcut. If multiple companies are required, a separate shortcut for each company will need to be configured. Before launching the shortcut, make sure to activate and convert the company to the latest version within Sage 100 through the Launcher.

Modifying the SPP Landing Page

The Sage Provisioning Portal’s landing page can be updated to show additional tasks. This is done through Remote Desktop Services in the Server Manager application on the Virtual Machine. Users will need to have access to the Virtual Machine in order to add the task to SPP launchpad. Contact your SPP reseller if you do not have access to the Virtual Machine. Additional permissions may be required to access the Server Manager.



Once connected to the Server Manager, navigate to the Remote Desktop Services menu, select Collections and then App Collections.



Select the Tasks menu in the RemoteApp Programs section and choose Publish RemoteApp Program. Follow the instructions in the Wizard that launches to add the program. You will need to manually add the ProvideX program located in your MAS90/HOME directory (typically C:\Sage\Standard_2023\MAS90\Home\pvxwin64.exe on most SPP installations). Set the parameters for the remote application like the parameters used for creating a Windows shortcut in the above section. Always set the user and password to “noID” and “noPW” respectively. You will need to create multiple versions of this RemoteApp if you want to launch the xPRESS Sales Order Entry in different companies.

Windows Mode vs. Browser Mode

When running Sage 100 on a Windows device, Windows Mode is available from within the SPP portal. This will run the application in an RDP session, which is generally suitable for most Windows environments. However, if running on a Mac, iPad, or Android tablet, the option for Windows Mode is not available and only Browser Mode can be selected. This will launch Sage 100 rendered as HTML5 in the browser. The application works best using Microsoft Edge but can also be used in Google Chrome. Apple's Safari does not render as well and is not recommended. The ability to render screens as HTML is out of DSD's control. To be technical, this feature is provided by a third-party application called SparkView which is licensed to Sage to be used as part of the Sage Provisioning Portal.



DSD only recommends using Microsoft Edge as the browser to access xPRESS Sales Order Entry when using Browser Mode.

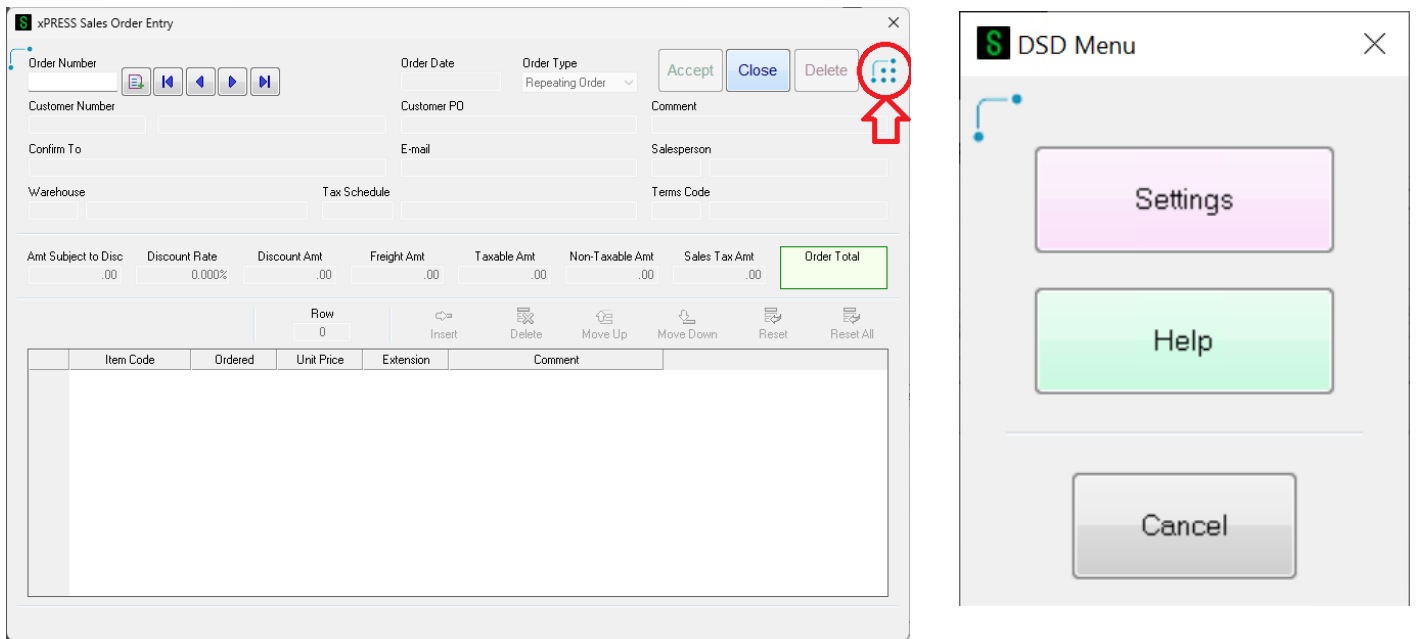
Role Security

In order to access xPRESS Sales Order Entry, access must be granted to launch this program by enabling access in Role Maintenance to a specific Role and then applying that Role to the individuals using this program. When installing for the first time, Sage 100 defaults access to new programs to OFF, which will also mean that the program will not show up on the Sage 100 menu. Once access is enabled, users with this Role will be able to access the xPRESS Sales Order Entry program, which will appear in the Sales Order, Main menu.

xPRESS Sales Order Entry inherits the security from Sales Order Entry, so if the Role being used does not have Create access in Sales Order Entry, the xPRESS Sales Order Entry will also disable the ability to create new orders or add new lines to existing orders.

Section D: System Operations

Configuring the xPRESS Sales Order Entry application will allow users to optimize the display and layout of the Order Entry form for their particular device. The first time the xPRESS Sales Order Entry program is run, the xPRESS Sales Order Entry Window & Keypad Settings dialog will be displayed. It's important to configure the settings for each specific device as the screen displays vary greatly and may result in controls appearing off the display if set incorrectly.



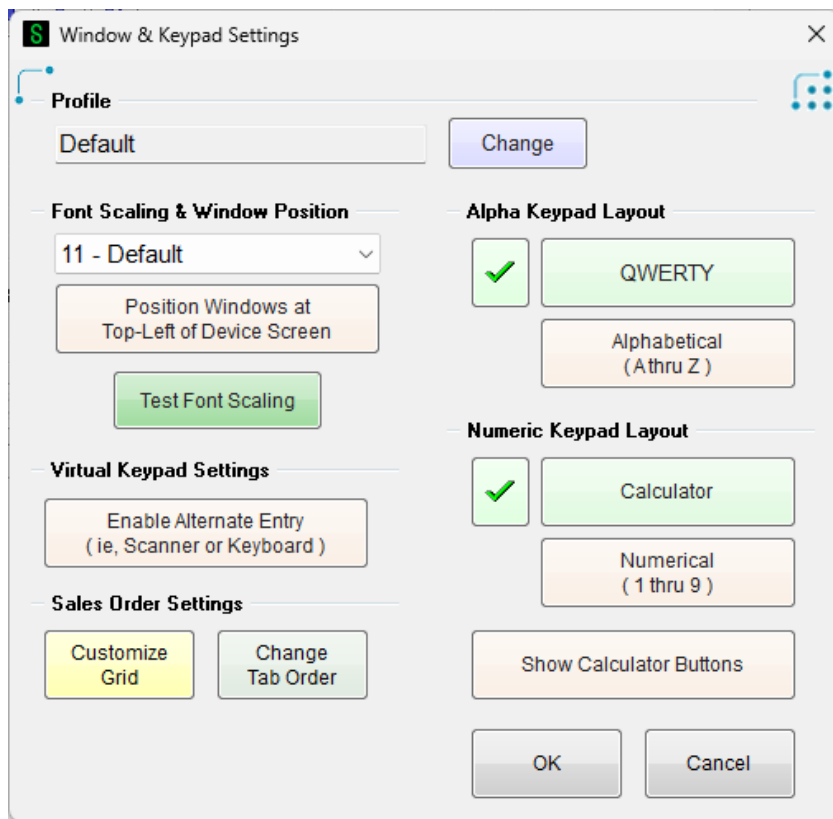
To access the Settings menu at any time, tap the DSD Menu Button located in the upper right corner of the application window which will launch the DSD Menu. Tap the “Settings” button to launch the xPRESS Sales Order Entry Window and Keypad Settings. Be aware that the settings can only be updated when there is no active record in the Order Entry screen.

The first time running the xPRESS Sales Order Entry program, users will also be prompted with extensive Help dialogs that will help familiarize themselves with the new xPRESS environment. Help will automatically display the first time any new dialog, keypad or other panel is launched. After the Help dialog is dismissed this first time, it will not appear again unless explicitly selected in the DSD Menu.

NOTE: The Theme used for the Sage 100 Company can change the way the xPRESS screens display. xPRESS Suite modules respect the settings defined in Company Maintenance which will allow for various color schemes to be used to render the screens.

xPRESS Window & Keypad Settings

The Windows and Keypad Settings dialog defines the font size that will be used for the xPRESS



Sales Order Entry program along with a number of other user-customizable options. One of the key features of the xPRESS Suite applications is being able to more granularly resize the application to take advantage of additional screen real estate. The Settings window will automatically appear the first time you access the xPRESS Sales Order Entry program from a unique workstation. Settings are configured and saved based on user and profile. If you are using xPRESS Sales Order Entry in the Sage Provisioning Portal on an iPad or other device, this is an important step that you should not skip. Changing the settings will require you to exit and restart the xPRESS Sales Order Entry

program before changes take effect.

Profile Definitions

Settings are defined and saved in Profiles. Users can define multiple profiles for various devices that they log into. Multiple profiles are available only to the same user. When the user starts up xPRESS Sales Order Entry, the program will determine if the user has logged in with this workstation previously and whether a profile is assigned to it. Devices used in Browser Mode return back a Workstation Name as an IP address. As this IP address can be dynamic, Profile definitions were created to allow users to copy their xPRESS Sales Order Entry settings in the event that the device IP address gets changed. This also allows the user to share profiles across different machines and/or devices.

First Time In

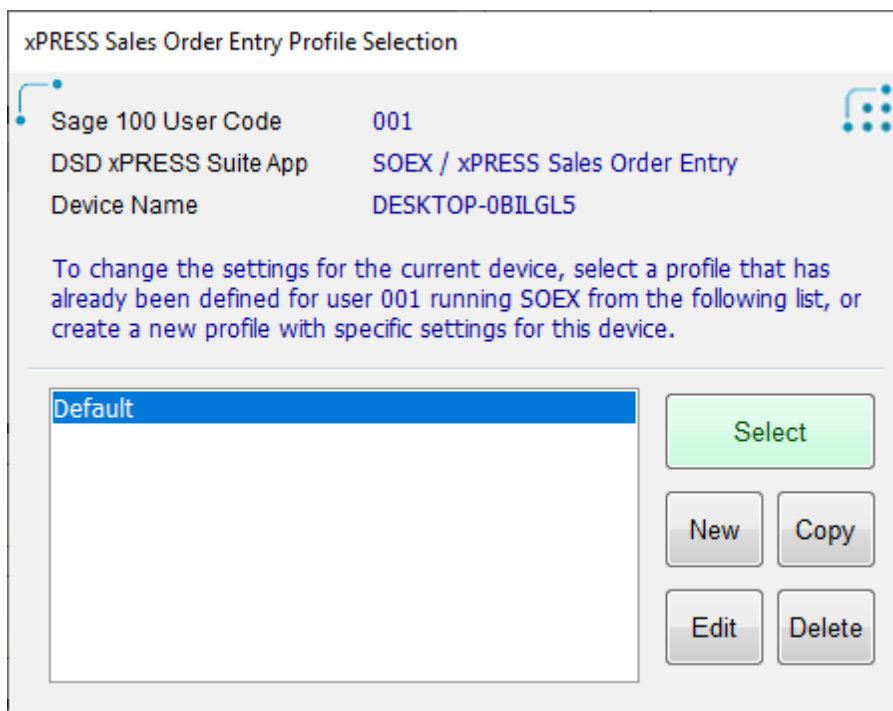
The first time each user starts xPRESS Sales Order Entry, a Default profile will be created. Users cannot change this first profile but once set up, accessing the Settings again will allow users to define additional profiles that can be used across multiple devices. A Default profile is set for each user login. Upon creating the base settings for this workstation, xPRESS Sales Order Entry will need to be restarted to use the new settings (the xPRESS Sales Order Entry program will exit at this point).

Creating New Profiles

To create multiple profiles, or select from several already defined profiles, tap the Change button next to the Profile description. The Profile Selection screen will be displayed with a list of Profiles created for this user.

To create a new Profile, either tap the New button to create a new Profile based on the factory default settings or select Copy to create a new Profile based on the selected Profile. Upon selecting either button, the user will be prompted to name the new Profile.

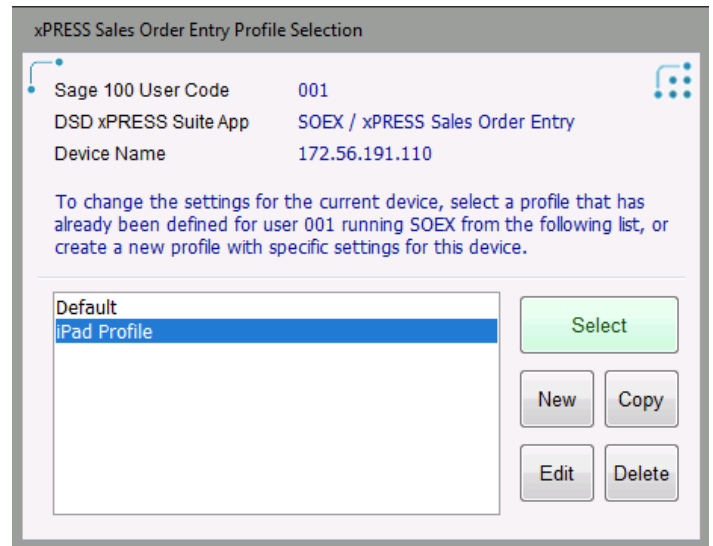
To change the name of an existing Profile, tap the Edit button. The user will be prompted to enter in a new name for the Profile. Select Enter to accept the new Profile name or Cancel to exit.



Once a new Profile is either created or selected, control will return back to the Settings screen where the font size, keypad layouts and other settings can be defined. Note that creating or selecting a new Profile will require xPRESS Sales Order Entry to exit as changes will not take effect until the program is restarted.

Detecting a New Workstation

When a new workstation is detected for an existing user, they will be prompted to first select a Profile before configuring the settings for this device. When using Browser Mode, workstations are assigned an IP address, which may not be static. If a new IP address is detected, even though the same device may be being used, an existing Profile can be selected so that users do not need to set up all their preferences and settings again.



xPRESS Window Settings

Select the font size to scale the xPRESS Sales Order Entry application. Available font sizes start at 11 as the default and can run up to 27 points. When selecting a new font size, tap the Test button to see how the window will look before committing the change. This is important when using devices such as an iPad where it is challenging to move windows around. Ensure the entire test window appears on the screen, particularly the Close button located in the upper right corner of the window.

The test window will also let you see the different keypads available and how they will look when you access them through the application. The keypads also scale based on the font size.

When accessing xPRESS Sales Order Entry through the Sage Provisioning Portal, the Position at Top-Left of Screen button can be selected to always bring the window up in the upper left corner of your screen. When running the Sage Provisioning Portal in Browser Mode, starting the application in the upper left corner of the screen will keep the application in view, particularly when using non-Windows devices such as an iPad.

xPRESS Suite Keypads

There are five types of keypads created for the xPRESS Suite based on the type of control/field being accessed. The different keypads can be viewed and testing using the Test button on the Settings menu.

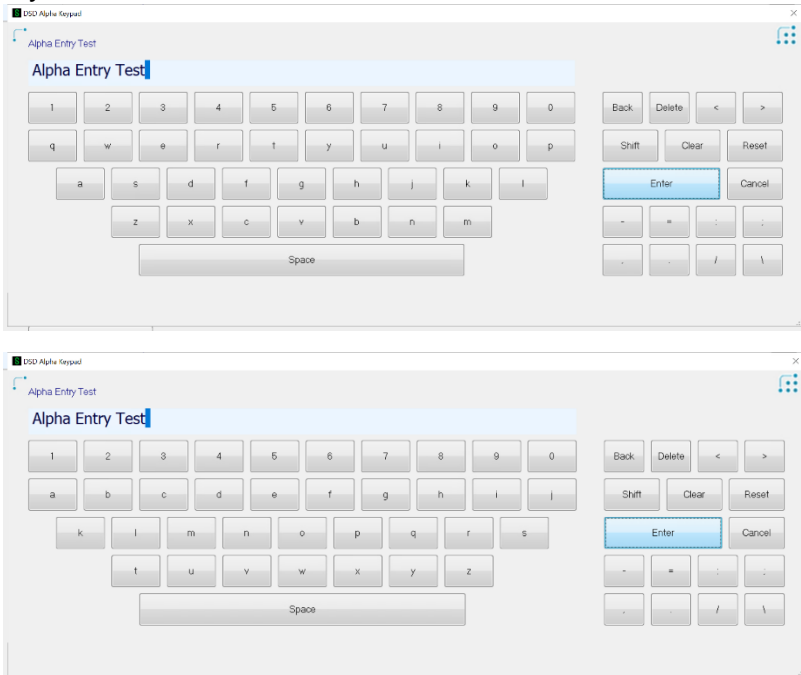
- Alpha Keypad – for most standard controls that take alpha-numeric input.
- Numeric Keypad with Calculator – for controls that only accept numeric input.
- Calendar Keypad – for controls that require date input.
- Dropbox/Listbox Keypad – for traditional dropbox, listbox or radio button controls with a limited number of options.

- Checkbox Keypad – for checking or unchecking check box controls.

Some of the keypads have settings that can be configured in the Windows Settings screen.

Alpha Keypad

Most controls will use the Alpha Keypad, which allows for alpha-numeric entry in addition to a handful of symbols/punctuation. The Alpha Keypad is defaulted into the traditional QWERTY-style keypad layout, but there is an option to change this to an alpha-linear keypad. An example of each keypad styles is shown below.



Tap the Shift button to toggle between upper and lower-case letters. Shift will also change the numerals on the top row to the standard symbols associated with those keys on the keypad. The Shift functionality will automatically be reset after selecting a value. Pressing the Shift button twice will activate the Shift Lock function, which will prevent the Shift from resetting after each key pressed. Tap the Shift button again to disable the Shift Lock. Shift Lock will be indicated on the keypad by changing the button to read "SHIFT."

Tap the Back button to remove the character to the left of the cursor. Tap the Delete button to remove the character highlighted by the cursor. In both cases, the remaining text (if not at the end of the string) will be shifted to the left. The left and right arrow buttons can be used to move the cursor to the left or right respectively.

The Clear button will clear the contents of the field. Reset button will reset the text to the original value that was passed into the keypad. The Enter button will close the keypad and send back the contents of the entry field to the calling program. The Cancel button will close the keypad without sending any changes back to the calling program.

Numeric Keypad

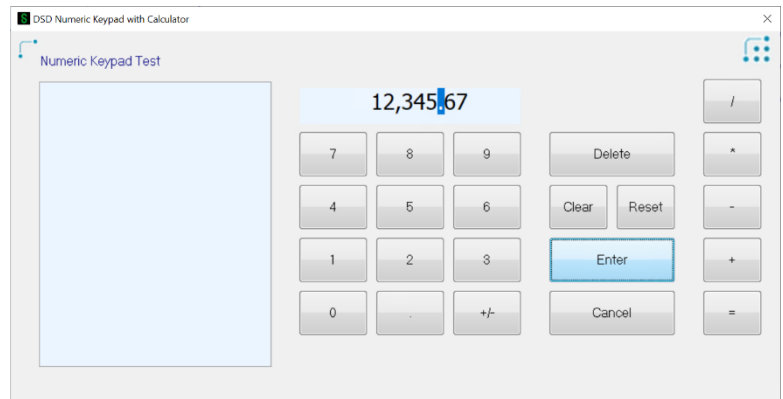
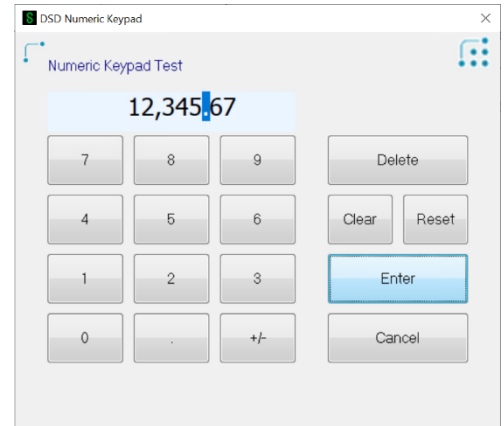
The Numeric Keypad is used by controls that only allow for a numeric value. Additionally, calculator buttons and a running tape total can be enabled for this control for users that want to be able to do calculations during entry. Users can also select to see the display of the buttons in a traditional calculator/keyboard style layout or a telephone-style numerical layout (1-3 on top row).

Enabling the Show Calculator Buttons will change the Numeric Keypad to display calculator functionality along with a running tape total.

When entering values into the numeric keypad, the cursor will default to the decimal point. Typing in any numeric value will add the digit to the left of the decimal point. Digits in the display will be pushed to the left as new digits are added. Once the decimal point is pressed, the digits entered will be added to the right of the decimal point, pushing out any existing digits to the right.

Pressing the Delete button removes a digit either to the left or right of the cursor based on whether the cursor is positioned before or after the decimal point. Pressing the Clear button will zero out the entry field. Pressing the Reset button will restore the value that was originally passed into the keypad.

If the Calculator functionality is enabled, pressing any operation button will add the current value into the running tape total and clear out the entry field. Entering new value and then pressing another operation button, including the equals sign, will perform the prior operation on the two values and place the resulting value in the running tape total. The entry field will be cleared in anticipation of another operation being executed. Even though the value showing in the entry field is 0, if there is a total in the running tape total, that value will be returned to the calling control when the Enter button is pressed.



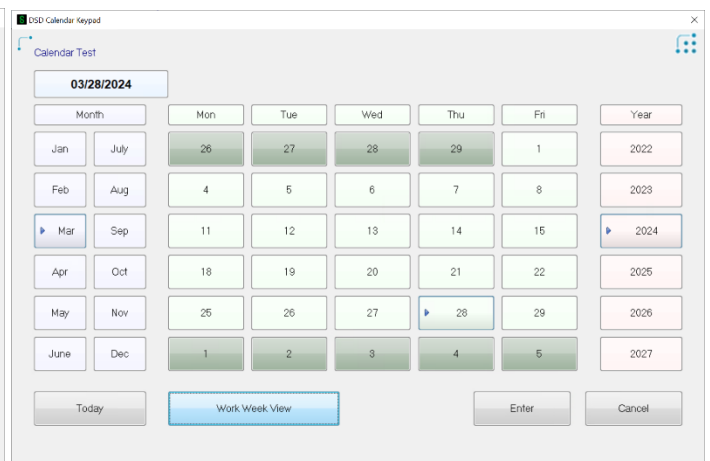
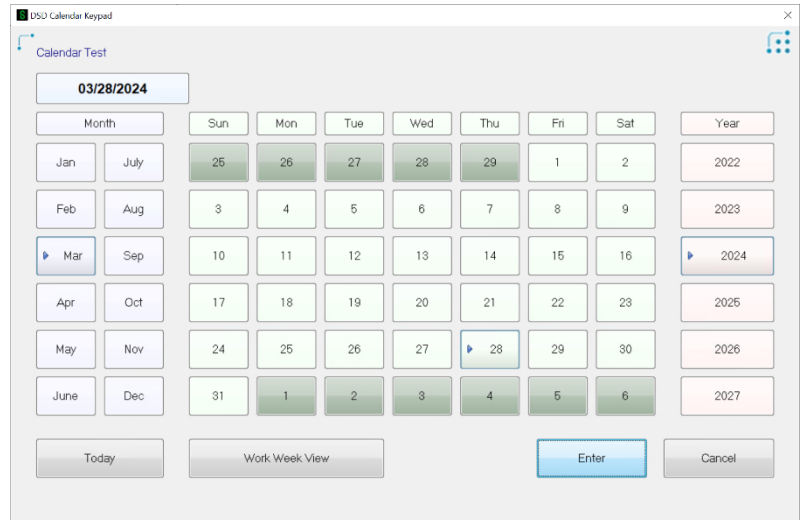
Calendar Keypad

The Calendar Keypad is a special keypad used for date entry. The keypad displays the month of the date that has been passed into the control. The current date is displayed with a light highlighting and small arrow next to the respective month, day and year.

The month being displayed in the keypad can be selected by pressing a month button along the left side of the keypad. The calendar year can be changed by selecting a year on the right side of the keypad. Initially, only the prior two and future three years are shown.

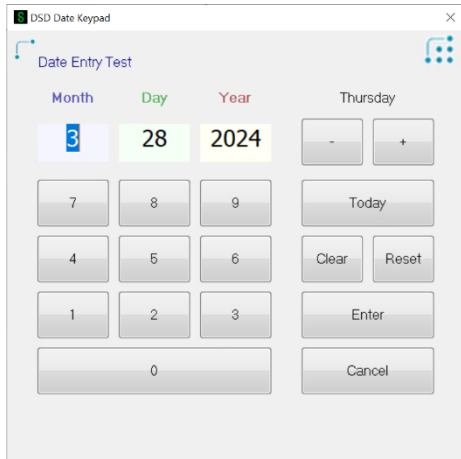
To scroll the years listed in the control, click on the earliest year to scroll the years back three years. Click on the latest year to scroll the years forward three years.

The layout of the calendar display can be modified to show the traditional month view, a highlighted view showing weekend days shaded and a work week view that only shows days between Monday and Friday. This view can be toggled by pressing the Work Week View button to cycle through the three options.



Pressing the Today button will set today's date to the keypad. Pressing the Cancel button will return control back to the calling program without changing the date. Pressing the Enter button will send the date back to the calling control.

Date Keypad



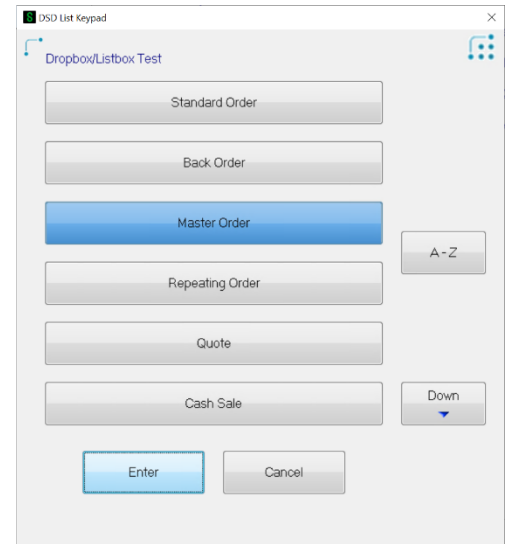
The specific date can be entered by pressing the date field in the top-left corner of the Calendar keypad. This will bring up a direct date entry dialog where the date can be typed in using a numeric keypad. Tap the Month, Day, or Year field to change their values. After pressing Enter, control will automatically advance to the next field during data entry. For year entry, two-digit years between 00 and 49 will translate to 2000 to 2049. Two-digit years 50 and greater will translate to 1950 to 1999.

The Today button can be pressed to set the date entry to today’s date. Pressing the + or – buttons will increment or decrement the day. Pressing the Clear button will reset the field that is currently active (Month, Day or Year) back to zero. Pressing the Reset button will reset the date to the original date passed into the keypad. Pressing the Cancel button will return control back to the calling program without changing the date. Pressing the Enter button will send this date back to the calling control.

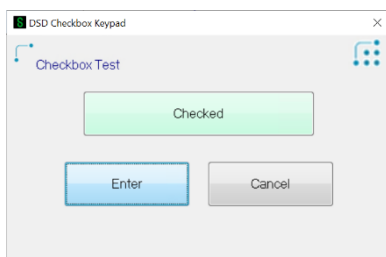
List Keypad

The List keypad replaces the traditional drop down, list box and radio button controls with a button list that is easier to use in a touchscreen environment. Most of these controls have a limited number of options. Up to six options can be displayed on the keypad at a time. In the event that there are more than six options available for selection, Up and Down buttons are displayed to scroll through all the available selections.

Pressing the Cancel button will return control back to the original program with no option selected (the default option already in the control will be used). Pressing the Enter button will send the selected option back to the calling control.



Checkbox Keypad



The checkbox keypad toggles between the green “Checked” option and the red “Unchecked” option. When checkbox controls are encountered within the entry forms, this dialog will appear. In addition to being more touch-friendly, it also completes the flow of data entry fields (without this keypad, the checkbox control would be skipped in the tab sequence and control would proceed to the next field).

Virtual Keypad Settings

An additional setting can be set in the xPRESS Sales Order Entry Window and Keypad Settings dialog. **Enable Alternate Entry (Scanner/Keyboard)** turns on the ability to use alternate entry methods like bar code scanners, keyboards or other input devices. While the Virtual Keypads are active, a traditional keyboard or other devices like bar code scanners, if attached to the device, will not register during data entry in the keypads. For users who are accessing the xPRESS Sales Order Entry program with a device that has an attached keyboard or a bar code scanner (or any other device that emulates keyboard entry), enabling this option will turn on a button on the keypads that will override the touch keypad entry and allow input from the attached device. **The Item Number column in the line entry grid is the only field which currently supports this feature.** This will allow users to attach a bar code scanner to scan in item codes during data entry.

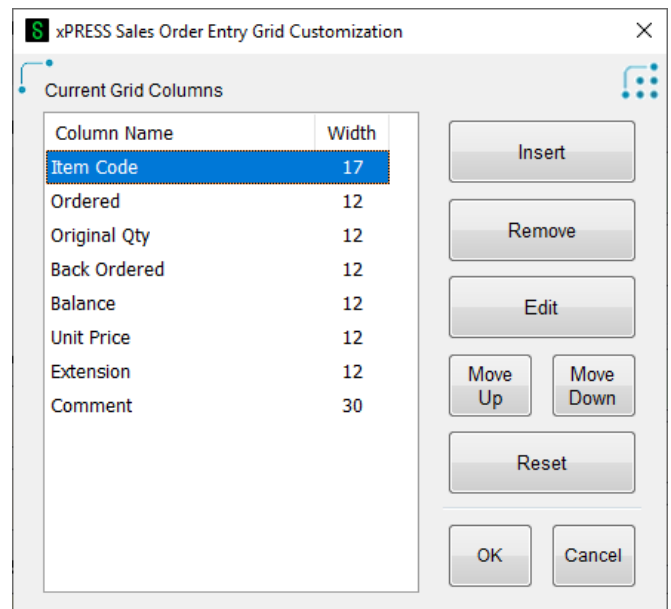
Sales Order Settings

The xPRESS Sales Order Entry program can be customized in multiple ways based on user workflow. These settings allow users to customize the grid entry fields being displayed in the xPRESS Sales Order Entry main dialog and adjust the Tab Order of the fields. All settings are saved by Profile so multiple workflows can be defined as saved as needed.

Customize Grid

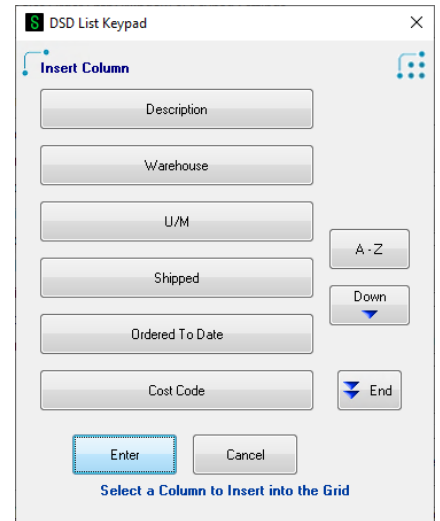
Tap the Customize Grid button to add or remove fields from the display grid. This functionality replaces the drag-and-drop capability of the traditional Sales Order Entry program when fields can be moved between the primary grid and secondary grid. As there is no secondary grid in xPRESS Sales Order Entry, this tool is used to add or remove fields from the displayed grid.

The first time the Customize Grid button is selected, the default ordering of the primary grid columns is listed. These columns can be re-ordered but they cannot be removed. To change the order of the columns as they appear in the grid, select the column and then tap the Move Up or Move Down buttons to shift that column. Note that some of these fields will not appear when entering Sales Orders based on the type of Order being created.



To add a new column tap the Insert button. The new column will be added before the column currently selected. Note that you cannot add a column before the Item Code, which must be the first item in the list.

A new dialog will appear displaying all the available columns that are available to be inserted into the grid. This list corresponds to the secondary grid in the traditional Sales Order Entry program. Navigation of the list uses the xPRESS Listbox keypad controls. Tap the A-Z button to reorder the list alphabetically. Select any column and tap the Enter button to move it into the primary grid. Select Start or End to go to the top or bottom of the list or the Up and Down buttons to shift the list of columns up or down. If UDFs exist on the Sales Order Detail object, they will be displayed at the end of the standard list of columns.



Select the column to add to the primary grid and tap the Enter button. Pressing the Cancel button will return back to the main customization dialog without bringing over any additional columns.

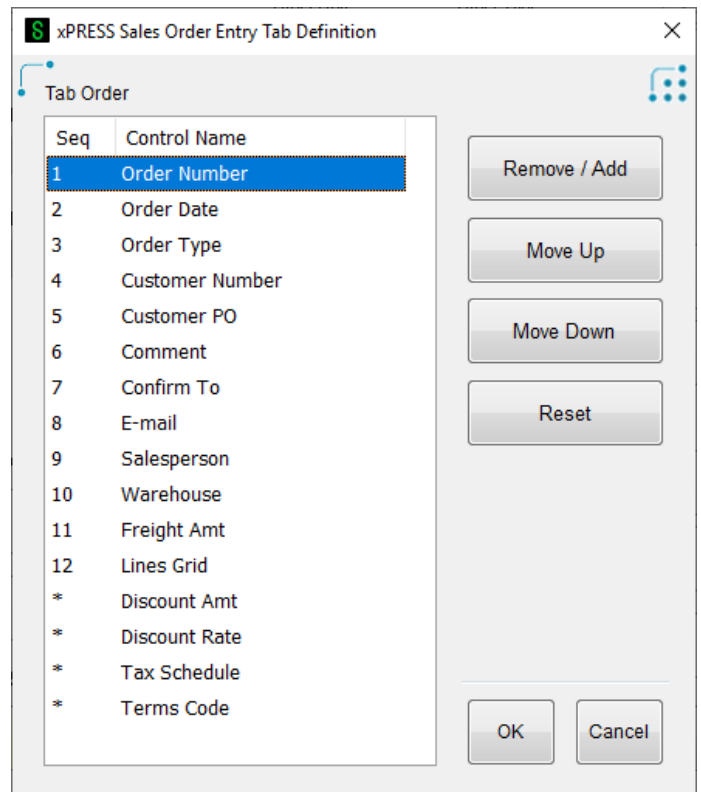
In addition to adding and re-ordering columns, the customization dialog also allows columns to be renamed and resized. To change the column name or width, select the column from the selection list and then tap the Edit button. A dialog box will appear allowing you to first change the description of the column and then the width of the column. This is particularly useful for UDF fields which will pull the dictionary name in by default (e.g., UDF_MYFIELDNAME).

Change Tab Order

The xPRESS Sales Order Entry main dialog displays most of the fields found on the Main, Address and Totals folders of the traditional Sales Order Entry program. While you are not able to add or remove any fields on the dialog, you can change the order in which they are accessed, or skip them altogether if they are not used or rarely used. To change the tab order, tap the Change Tab Order button under the Sales Order Settings section of the Settings window.

A list box displaying all the fields that are displayed on the main form are displayed in the order that they will be accessed. To change the order, select any control and tap the Move Up or Move Down button to position the control in the desired location.

To remove a control from the tab sequence, tap the control and then tap the Remove/Add button. The control will be moved to the bottom of the screen and displayed with an asterisk instead of a sequence number. To add back in a control that was previously removed, tap the control from the list and tap the Remove/Add button. The control will be added to the end of the list. Move the control to the order desired. Removing a field or control from the tab order does not remove the field from the dialog screen. You are still able to access this field by manually selecting it during data entry. The field will be skipped as you auto-advance from field to field during data entry.



To return the tab order to the factor defaults, tap the Reset button. All fields will be reinstated into the list and ordered based on the original default settings.

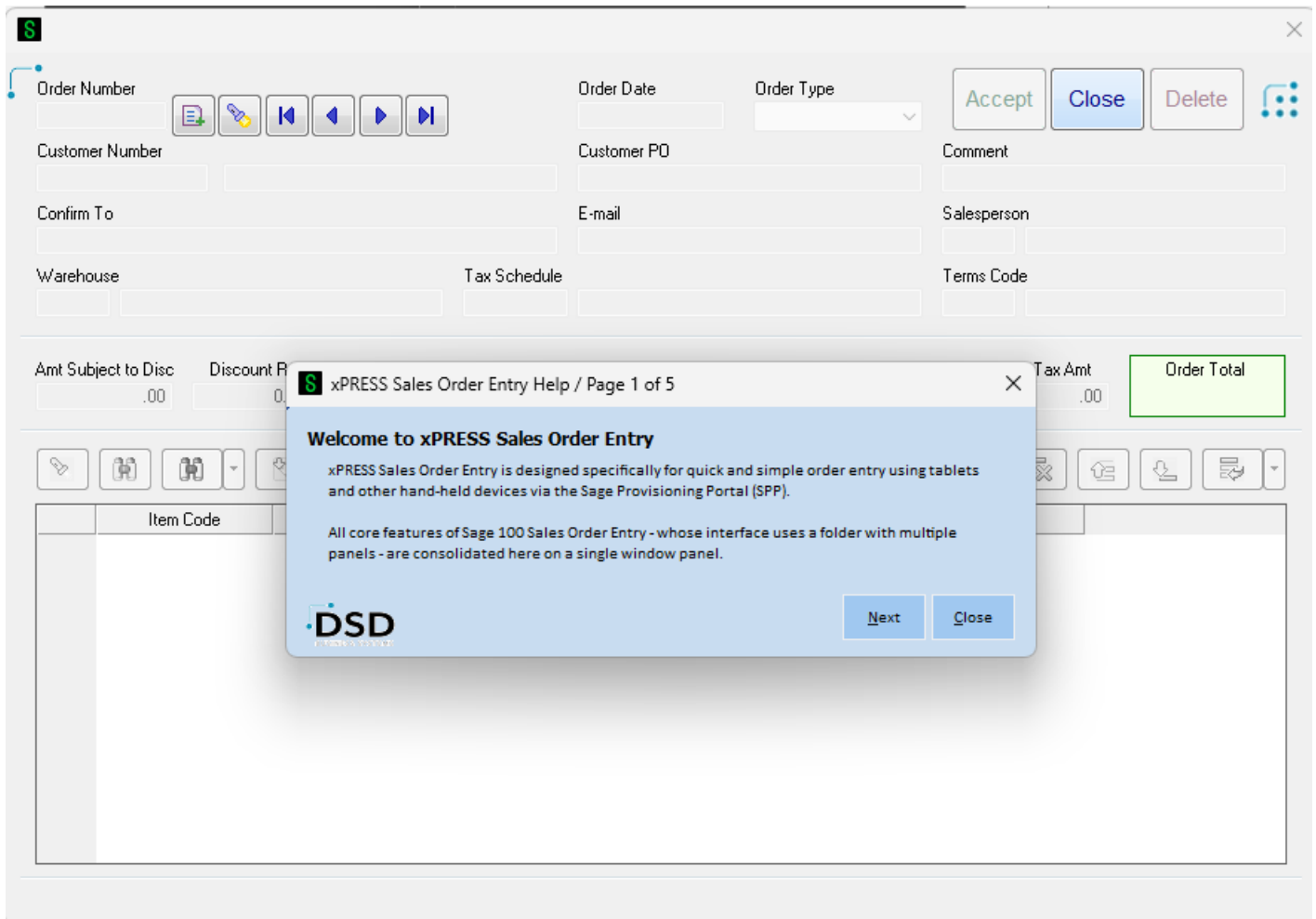
Tap the OK button to accept the changes as displayed. Tap the Cancel button to revert back to the previously saved tab order.

Using xPRESS Sales Order Entry

The xPRESS Sales Order Entry program functions very similarly to the base Sales Order Entry program that is run from the Sage 100 Launcher. The key difference between the base Sales Order Entry program and the xPRESS Sales Order Entry program is the consolidation of all the Sales Order Entry panels into a single panel in xPRESS Sales Order Entry.

Help System

A new, context-sensitive Help system has been developed for the xPRESS Suite of products. The first time xPRESS Sales Order Entry is run for each user, they will be presented with the blue help dialog. Pressing Next will cycle through the available help dialogs for this form. The help system can be accessed at any time by selecting the Help button off of the DSD Menu. Tap the Close button to close the Help dialog.



xPRESS Suite Keypads

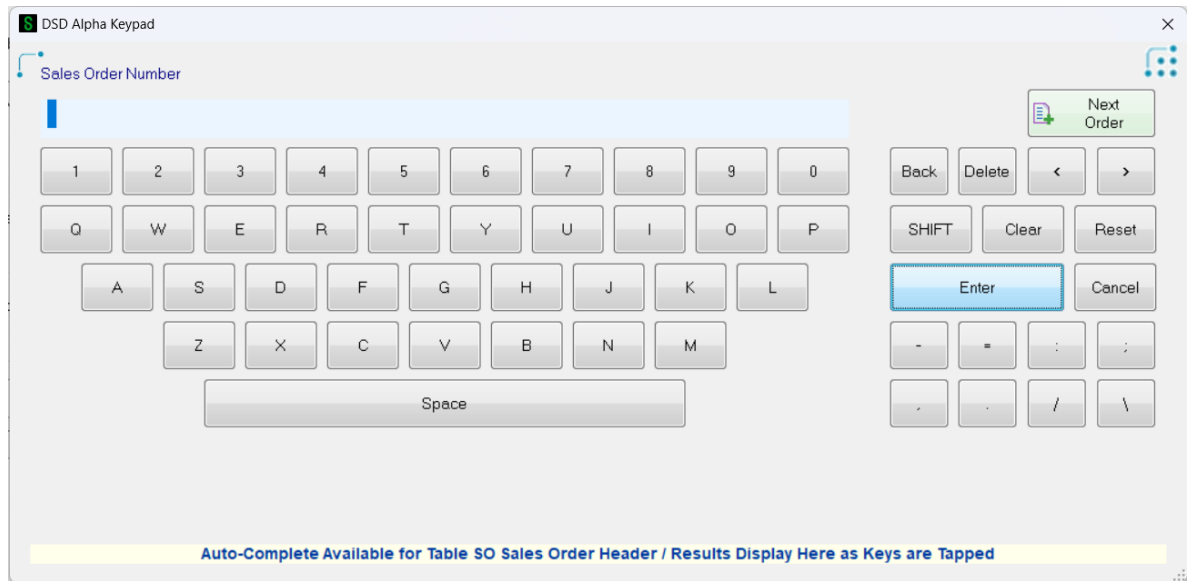
The xPRESS keypads are displayed automatically as each field is accessed. All the keypads are context-sensitive, and will display pertinent information to assist with navigation through the form. As the primary form will be obscured by the keypad, data such as the Sales Order Number and Item Number will be displayed. Additionally, relevant information about quantity on hand will also appear when entering quantities in the detail lines.

Pressing the Cancel button on any of the keypads will cancel the entry dialog and will return control back to the main form. This will allow the user to select a different field anywhere on the form. This

is useful when bringing up existing orders for review as opposed to entering in new orders. Tapping the DSD Menu button while in any keypad will show a “Keypad Assist” option that describes the features and usage of the keypad.

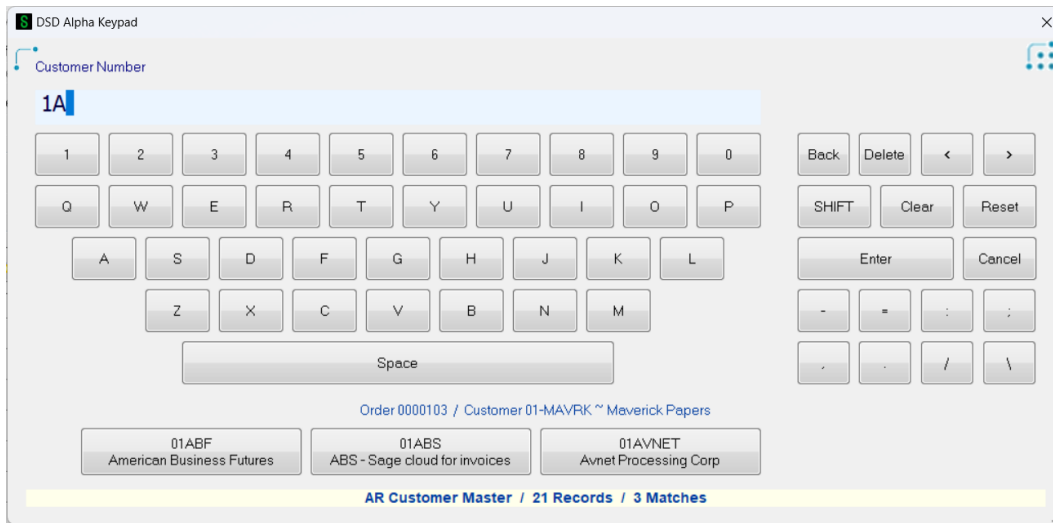
Next Number

Some fields allow the user to select the next available number, such as next Sales Order number. These controls appear on the keypad itself. Only select fields have this option; however, the ability to add certain records on the fly has not been implemented in xPRESS Sales Order at present. The Next button will appear in green in the upper right corner of the keypad as shown in the following example.



Auto Complete

Most fields have an auto-complete option that allows you to select a record based on the first few characters that have been entered. In the example below for Customer Number, the first two characters match three available records in the Customer Master file and are displayed below the keypad. For the Customer auto-complete, since the Customer record has two parts, the Division Number can be truncated for quicker searching. In the example below, “1A” translates to all customers that are in division 1 starting with the letter A.

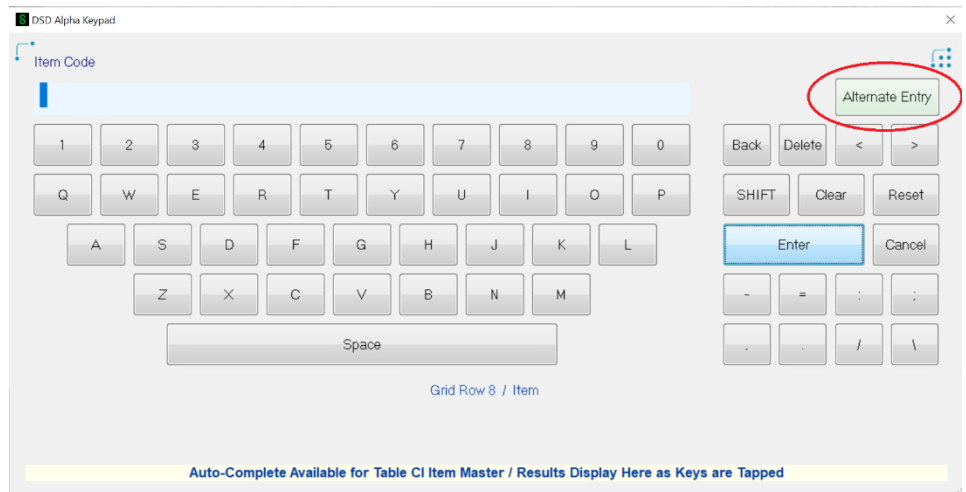


If more than four records are found, an arrow navigation button will appear to the left and right of the four items allowing you to scroll through the records that match the characters that have been entered into this dialog. In some cases (e.g. Terms Code), if

there are only four records available in the file, all records will be displayed until a value is entered which will narrow down the search. If more than four records exist, at least one character must be typed in before any options will be displayed.

Alternate Entry

When enabled, a button titled Alternate Entry will be displayed when entering an Item Code. This button is enabled by checking the **Enable Alternate Entry (Keyboard/Scanner)** option in the Settings menu.



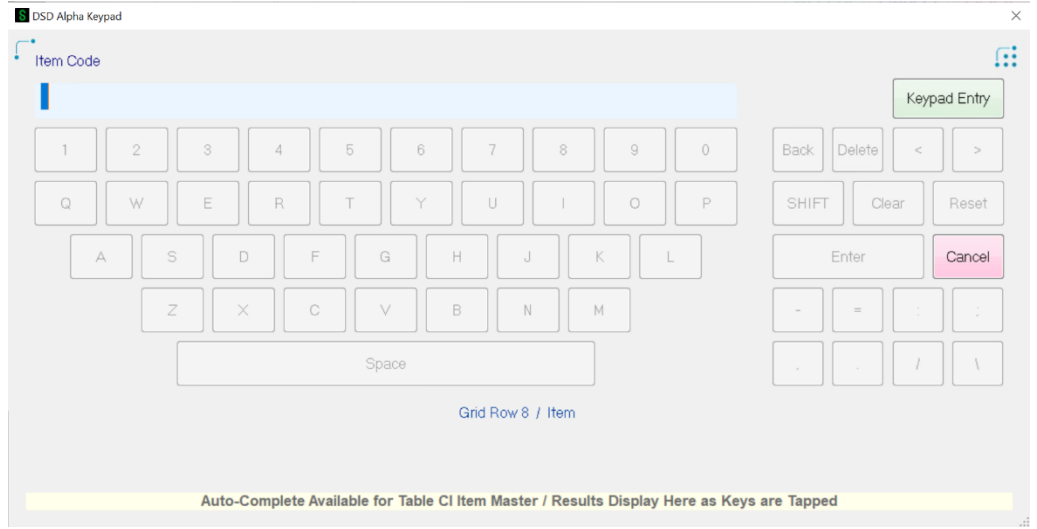
When pressed, the virtual keypad will be disabled except for the Cancel button. This also includes the Auto Complete feature. The Alternate Entry button will be renamed Keypad Entry and can be pressed to revert control back to the keypad. When in Alternate Entry mode, the keypad is still visible but the individual keys are no longer active. This will allow users to bypass the keypad entry and use any attached device that provides keyboard entry. For example, handheld bar code scanners that are attached to the device where xPRESS Sales Order Entry is being run can be used to scan in Item Codes. The scanner or other device must be configured to end input with a typical carriage return (CR or \$0D\$). If using an attached keyboard, pressing Enter will end entry. The field will be validated and control will then move to the next field.

If modifying a field with existing data, pressing the Alternate Entry key will clear the field in preparation for receiving data from the alternate entry source.

Pressing the Keypad Entry button will reset the keypad to its original data and re-enable the keypad for data entry.

Pressing Cancel while in Alternate Entry mode will cancel and close keypad entry. The field will reset

to its original data. Users will need to select a field to modify to display a new keypad for entry.

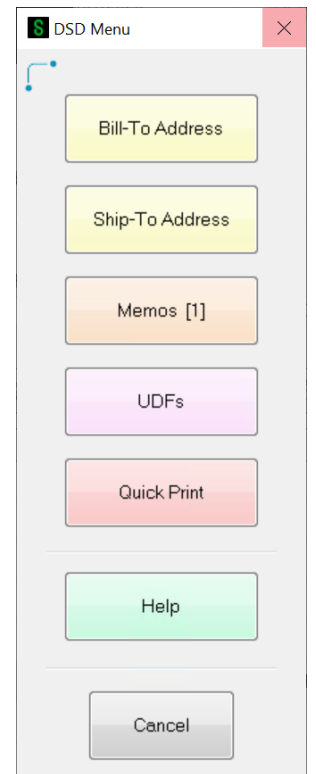


DSD Menu Button

The DSD Menu Button is located in the upper right corner of the xPRESS Order Form. Once a Sales Order is created or brought up, the contents of the DSD Menu will change. Note that Settings button is no longer available because this can only be selected when there is no Order loaded.

The options available on the DSD Menu will change based on the application. For xPRESS Sales Order Entry, these options are Bill-To Address, Ship-To Address, Memos, UDFs, and Quick Print. Details about each of these buttons and the associated functionality are described later in this document.

The DSD Menu Button highlights with a blue square whenever Memos exist for the Customer or Sales Order that has been accessed. If the Auto Display Memo option is not selected, Memos can be displayed through the DSD Menu. Similarly, UDFs can be created on a separate panel which can then be accessed by selecting the UDFs button.



Bill-to and Ship-to Addresses

The Bill-To and Ship-To addresses are not displayed on the primary form as these fields are generally not accessed often. Both can be accessed by pressing the DSD Menu button at the top right corner of the xPRESS Sales Order Entry form, which will display a menu of various options.

Tap the Bill-To Address button to display the bill-to address for this customer. Tap the Ship-To Address button to display the ship-to address for this order which has been defaulted in from the Customer Masterfile. Entering either Bill-To or Ship-To Address will allow the user to change the details of the billing or shipping address. Tap the OK button to save the changes or Cancel to

discard any changes and return back to the xPRESS Sales Order Entry main screen.

Memos

Two types of memos exist in Sales Order: Customer Memos and Sales Order Memos. If either type of memo exists when entering an order, a blue square will appear around the DSD menu indicating



that memos exist for this sales order or customer. Tap the DSD Menu button and then tap the Memos button. Note that memos are

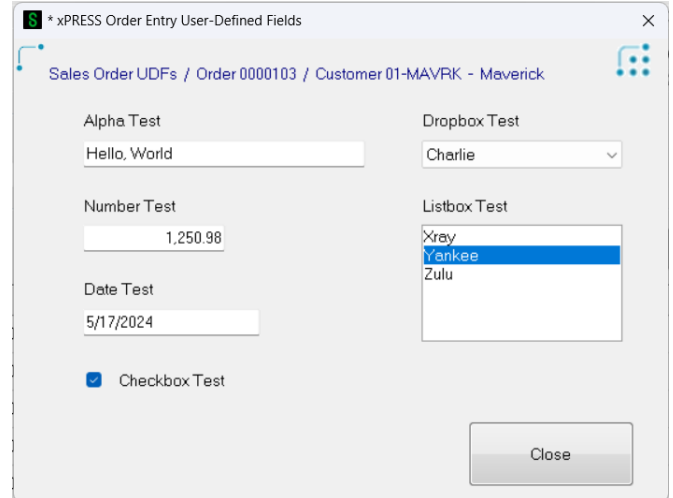
read-only in the xPRESS Sales Order Entry module and will only be displayed. Memos cannot be created or edited from within xPRESS Sales Order Entry.

If memos are flagged to be automatically displayed, they will appear when selecting the Sales Order and Customer. Memos for the Sales Order will be displayed first, followed by memos for the Customer in the event that both exist. The Memo dialog will allow the user to scroll through the memos for the Sales Order or Customer if more than one exists. Tap the Close button to return to the Order Entry screen.

UDFs

Tap the UDFs button to display the custom UDF panel created for the xPRESS Sales Order Entry library. This library can be customized through Custom Office, where you can add all types of UDF controls that are bound to the Sales Order Header business object. See Customization in the next section for more information on creating UDFs for the Sales Order Header.

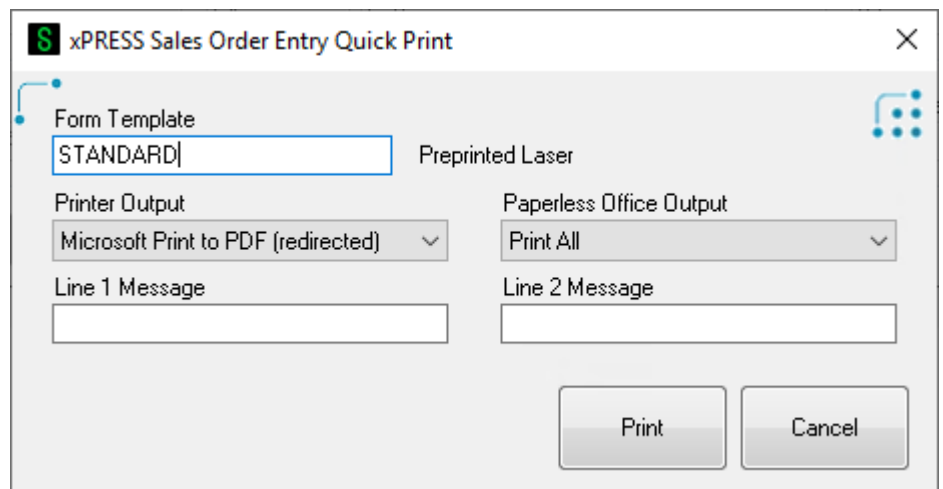
The UDF button will only be enabled when UDFs exist for the Sales Order Header. When selected, the xPRESS Sales Order Entry User-Defined Fields



panel will be displayed. The xPRESS Keypads corresponding to each UDF control type will be used to enter data into each of the fields. Tap the Close button to save the data in the UDFs and return back to the main Order Entry form.

Quick Print

Tap the Quick Print button from the DSD Menu to print this Sales Order to the printer of your choice. Printing from within xPRESS Sales Order Entry is limited to the current order, which must be saved prior to printing (similar to the standard Sage 100 Sales Order Entry program). If Paperless Office is enabled, the Paperless Office

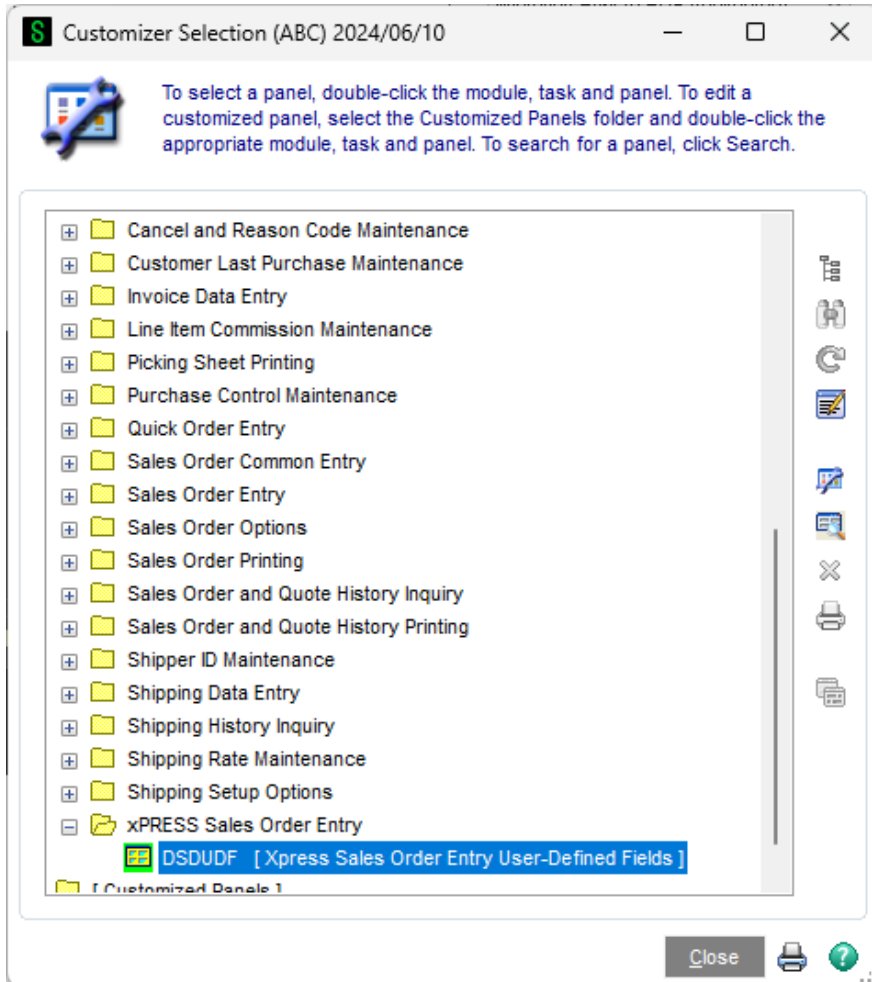


Output field will be enabled which will print Sales Orders to PDF and email then if this option is configured properly.

The printer options displayed reflect the options set by the operating system platform. Using RDP (Windows Mode) and/or Browser Mode to run xPRESS Sales Order Entry through SPP may limit the print options available.

Customization

The xPRESS Sales Order Entry can be customized to include UDFs and other information that doesn't appear on the form by default. Customization and personalization to the xPRESS Sales Order Entry form is saved by Profiles defined in the xPRESS Settings screen.



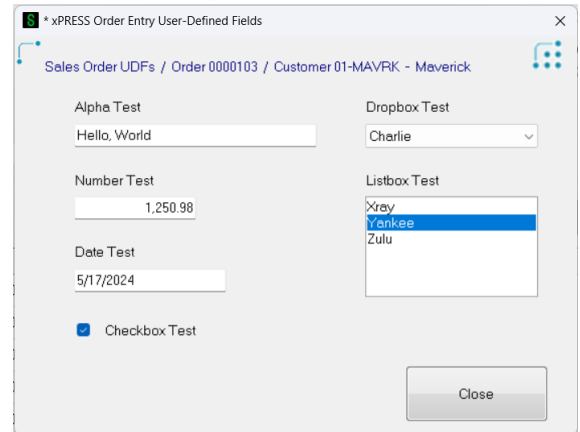
UDFs that have been added to the Sales Order Header file can be added to a special dialog created specifically for the xPRESS Sales Order Entry form. After creating UDFs on the Sales Order Header record, add these fields into the xPRESS Sales Order Entry panel for UDFs. You must add the fields in Custom Office through the standard Sage 100 interface. The xPRESS Sales Order Entry form cannot be customized on the fly.

UDFs are only allowed on the special UDF panel created in this form. Select the DSDUDF panel under xPRESS Sales Order Entry to access the panel. It will be defaulted to a blank form, but can be customized with any of the controls available within the Custom Office tool.

Users can access UDFs by pressing the DSD Menu button anytime while entering a Sales Order and selecting the UDFs button. When selected, a new dialog will appear showing the UDFs and other customizations that have been created on this DSDUDF panel.

The xPRESS Suite has introduced a number of new UI standards that diverge from the UI standards that Sage has used throughout the Sage 100 product. To match the consistency of the xPRESS Suite modules, take note of the following changes to the UI standards.

- Field Names and Field Controls are shown vertically instead of horizontally. The Field Name should appear above the Control itself. This makes re-sizing the forms more consistent and less prone to truncation as different font sizes are selected, particularly as the fonts get larger.
- Check box controls should display the check box to the left of the control text rather than to the right of the text.
- Buttons should be much larger to make it easier to touch the button as opposed to using the mouse to click on it.
- Keep fonts and sizes to default so that they can be dynamically adjusted by both Sage and the xPRESS Suite modules.



Additionally, the size of the UDF panel is not fixed. The UDF panel can be resized to fit the total number of controls on the panel. However, be careful not to make the UDF panel larger than the xPRESS Sales Order Entry screen or it may not be displayed in full based on the font size selected.

UDFs that are added to the Sales Order Detail file can be added into the grid through the Grid Customization logic in the xPRESS Sales Order Entry Window and Keypad Settings screen.

Sales Order Operations

The xPRESS Sales Order Entry program was not designed to completely replace the standard Sales Order Entry in Sage 100. Some functionality in the standard Sales Order Entry program is not available in the xPRESS Sales Order Entry program. xPRESS Sales Order Entry was envisioned to work for mobile salespeople who want to get an order entered at a client's location, for example, or anywhere that the salesperson happens to be. Once entered, an office employee may need to update the new Sales Order in the standard Sales Order Entry program for special/specific cases. As a result, several inquiries and other features have been suppressed or removed in the effort to simplify the xPRESS Sales Order Entry processes.

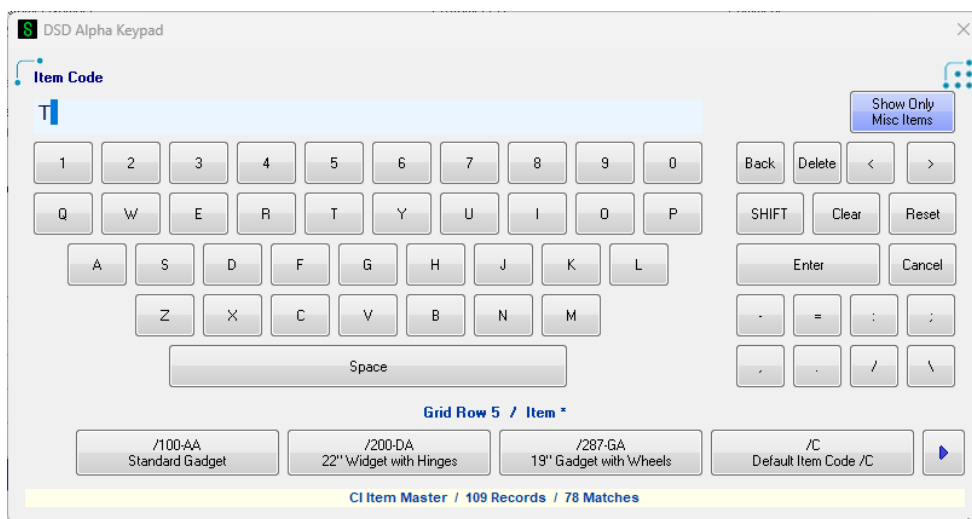
The features that are not enabled in xPRESS Sales Order Entry are described below.

- On-the-fly Entry – new Item Codes, Customer Numbers, Terms Codes, etc. are not enabled in xPRESS Sales Order. All data fields must already be in the system in order to be accessed through xPRESS Sales Order Entry.
- Lot/Serial Distribution – Distribution of Lot and Serial Items must be done in standard Sales Order Entry. It is presumed that the mobile salesperson doesn't know which serial number or lot an item will be shipped from when putting in the order.

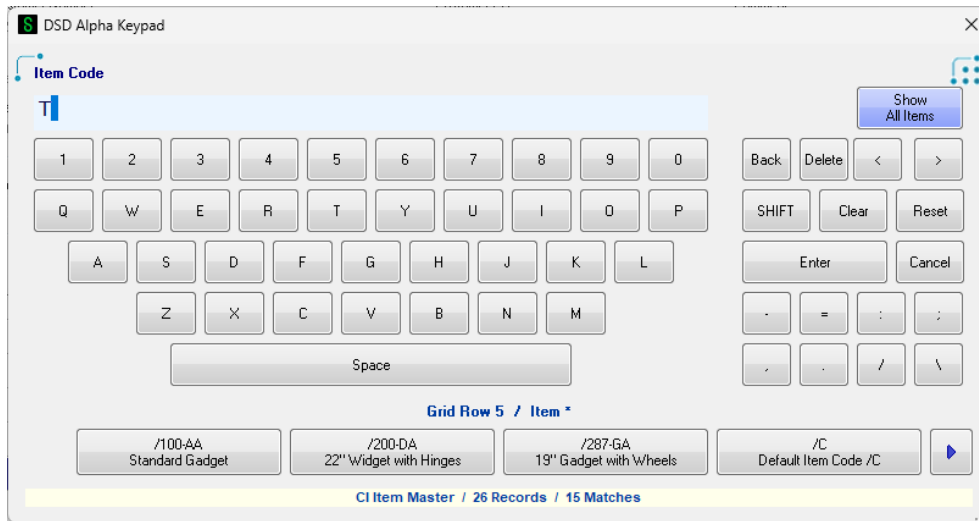
- Alternate Item Searches – Search buttons for Kits, Alias Items, Extended Descriptions and other buttons have been disabled on this version of xPRESS Sales Order. Other inquiries and searches for items have also been suppressed in this version.
- Special Items – Use of the “*” to add a special, one-time item is supported, but users will need to make sure to add the Cost field to the Line Entry Grid through Grid Customization in the Settings menu. This and possible other special codes may require additional that that is typically entered into the secondary grid of standard Sales Order Entry. In order to enter those items and save the sales order, those additional fields will need to be moved into the primary grid.

Miscellaneous Items

Miscellaneous items can be entered into the xPRESS Sales Order Entry detail grid similar to other items. As with standard Sales Order Entry, miscellaneous items must be flagged for use in Sales Order or they cannot be added. To facilitate finding Miscellaneous Items in the auto-complete logic, a new button has been added to the Alpha keypad when entering in items.



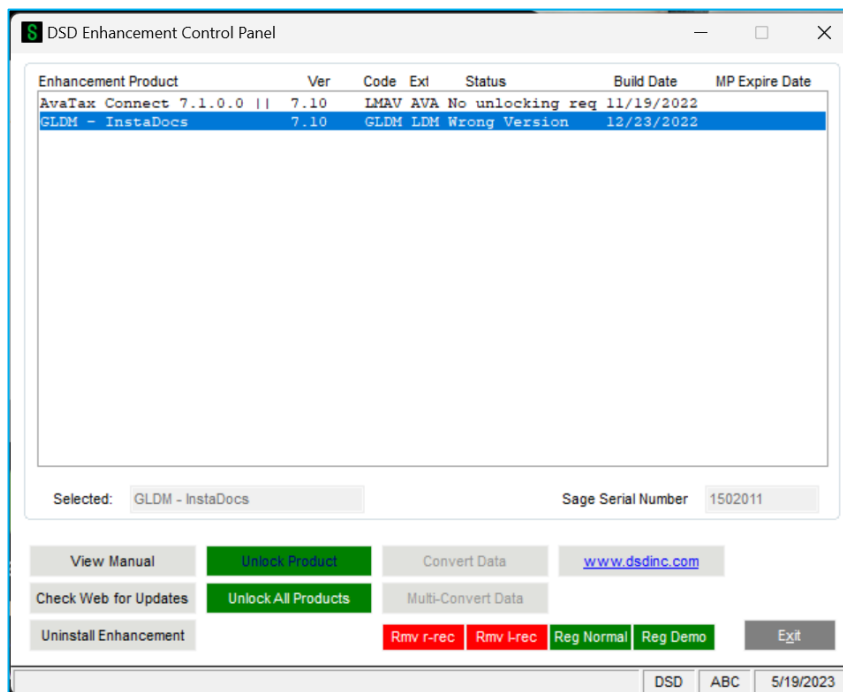
By default, all items are displayed in the auto-complete logic. By typing in a character, users can find items based on the item code or item description. However, if the user wants to only list miscellaneous items (which includes comments), clicking on the **Show Only Misc Items** button in the upper right corner of the keypad will reduce the number of entries in the auto-complete listing.



Once the **Show Only Misc Items** is pressed, the number of records and the number of matches has been reduced to only those found as Miscellaneous Items in the Item file. The button has also changed to **Show All Items**, which will toggle back to displaying all items in the auto-complete bar.

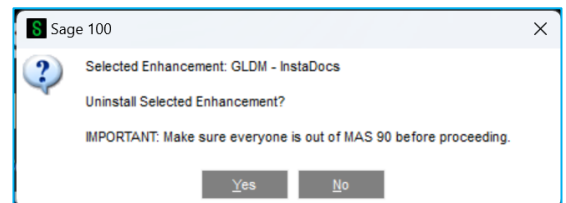
Section E: Uninstall DSD Enhancements

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.



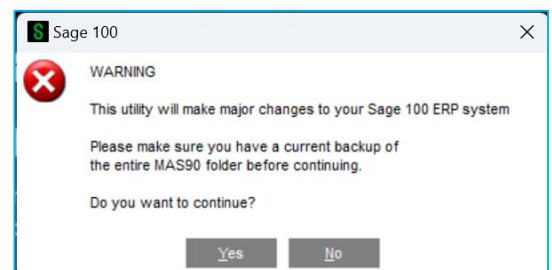
When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:

- 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.

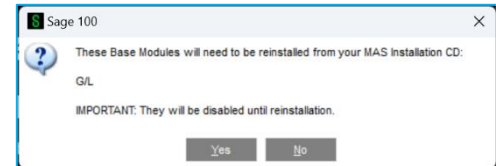
- Select **No** to exit the Uninstall Process.
- Select **Yes** to continue with the Uninstall Process.



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.

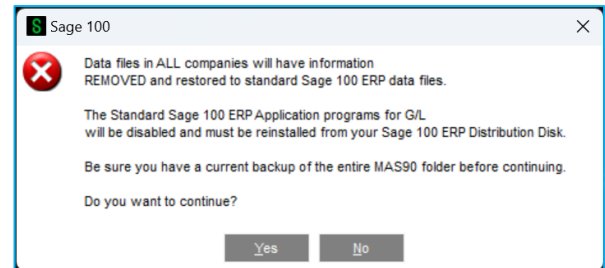
A message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

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

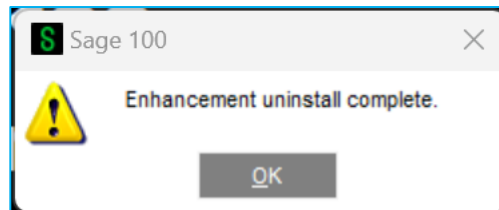


The following message box will appear, displaying the final warning message.

- 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).

Section F: Resources and Support

Web Resources

DSD web site: <http://www.dsdinc.com>

The Enhancement page contains:

- Current Release Schedule
- Purchasing Information
- Installation Instructions
- Product Support
- Enhancement Links

xPRESS Sales Order Entry :

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

The product web page contains:

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

Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate.

- Telephone: 858-550-5900
- Fax: 858-550-4900
- Email: enhancements@dsdinc.com

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

- Enhancement Name
- 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, faxing or email, please include:

- Your name and company
- 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.




Since 1984, DSD Business Systems has been providing clients with professional business consulting services and business software solutions across the globe. Specialties include Sage Intacct, Acumatica Cloud ERP, Sage 100, Sage 300, Sage 500, Sage CRM, Sage HRMS and more.

DSD Business Systems has been a Sage Tech Partner, commonly referred to as a “Master Developer”, for over 30 years. DSD currently has over 500 Enhancements to Sage 100 and has created thousands of custom solutions for end-users around the world. We have had the privilege of working with hundreds of Sage consultants, resellers, and end-users to produce powerful custom solutions that enhance the functionality of Sage 100.

Contact DSD Enhancements

 enhancements@dsdinc.com

 [Enhancements Marketplace](#)

 **800-627-9032**