



DSD
BUSINESS SYSTEMS

DSD Business Systems

MAS 90/200 Enhancements

J000

Inventory Price Transfer

JC-1000

Version 4.40



**Sage Software
Development Partner
GOLD**

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Inventory Price Transfer User's Manual
Version 4.40

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Table of Contents

SECTION A: INTRODUCTION	5
WEB RESOURCES	5
SUPPORT	5
INVENTORY PRICE TRANSFER FEATURES.....	6
SECTION B: GETTING STARTED	7
REQUIRED LEVELS	7
INSTALLATION	7
DSD ENHANCEMENT CONTROL PANEL.....	8
SECTION C: SETUP	11
SECTION D: SYSTEM OPERATIONS	12
WHEN USING SALES ORDER PRICING	12
VISUAL INTEGRATOR	13
CRYSTAL REPORTS	13
SECTION E: UNINSTALL DSD ENHANCEMENTS	14
LICENSE AGREEMENT	17
FAX TRANSMITTAL FORM	19

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 MAS 90/200. For instructions on using MAS 90/200, refer to the appropriate MAS 90/200 manual, or call your MAS 90/200 reseller. DSD Business Systems offers excellent MAS 90/200 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*

J000 Inventory Price Transfer:

<http://www.dsdinc.com/enh/pages/J000.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 MAS 90/200 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.

Inventory Price Transfer Features

This DSD Extended Solution to the Job Cost module affects the way inventory items are priced for a customer. This Extended Solution allows each job that has inventory items issued to it to have its own pricing methodology by having the items priced using Retail, Standard, Sales Order or the normal Job Cost Price.

Section B: Getting Started

CAUTION

- **If you reinstall or upgrade one of the MAS 90/200 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.**
- **Do not install this Enhancement on MAS SQL Systems.**

Required Levels

MAS 90/200 Module	Module Required	Required Level
J/C	Y	4.40

Installation

1. **Back-up:** Exit all MAS 90/200 sessions. Back-up existing MAS 90/200 data.
2. **Check Levels:** MAS 90/200 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 MAS 90/200 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 MAS 90/200:** MAS 90/200 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 MAS 90/ 200 system that is being used must have web access for this option to be effective.
- You can send your Sage Serial Number to your DSD Enhancements sales representative.

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

- *Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.*

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

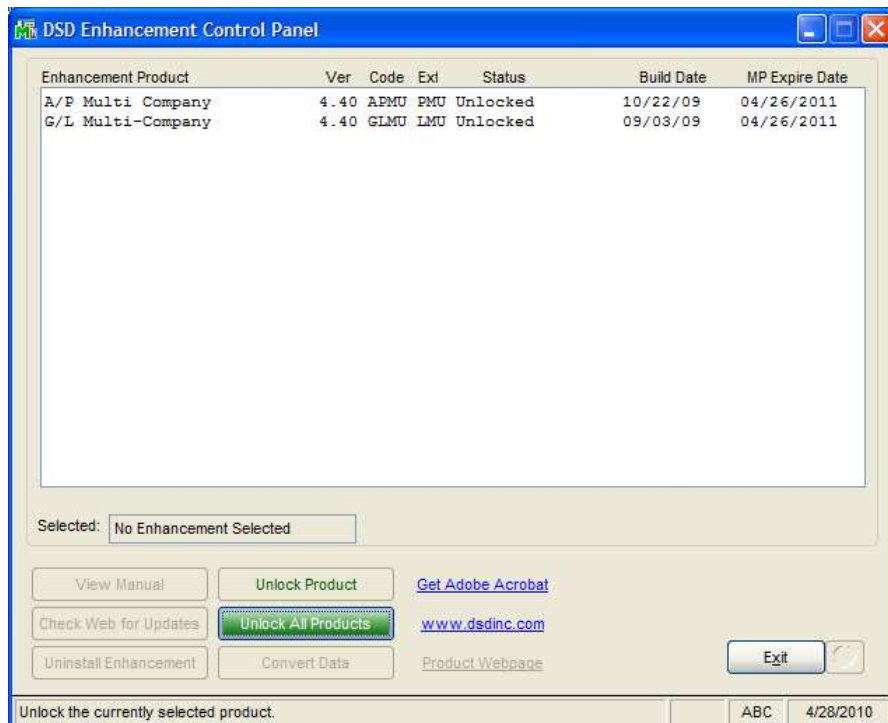
Note: You can also unlock a DSD Enhancement through the **DSD Enhancement Control Panel** found on the Library Master Utilities Menu. Then, select the Enhancement with your mouse from the list of Enhancements and click the **Unlock Product** button on the right side of the window.

7. **Convert Data:** After registration, the Data Conversion window will appear. Follow on-screen instructions to complete data conversion. *You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.*

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 MAS 90/200 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 MAS 90/200 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the “MAS90/PDF” folder and then displayed.

Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an ftp web connection on the MAS 90/ 200 system.*

Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked.*

Unlock All Products: This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled*



Convert Data: After verification, the selected Enhancements data conversion program will run. Data conversion is non-destructive, and may be triggered any number of times. Sometimes this is required to fix data records imported or updated from a non-enhancement installation.

Help: The Help button, located at the bottom right of the window, opens an HTML help file .

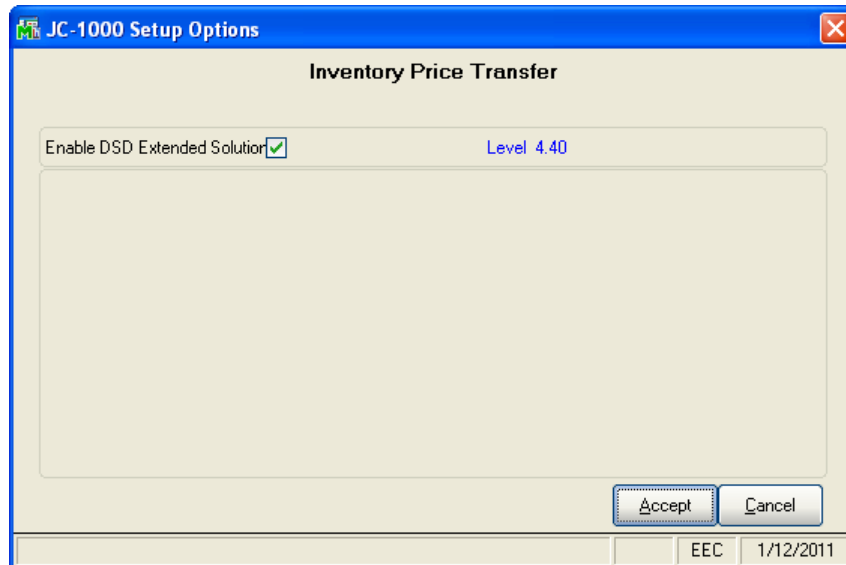
Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system.

There are also links to the DSD website and the Enhancement page on that site.

Section C: Setup

Upon completion of software installation, you will need to access the DSD Extended Solutions Setup from the Job Cost 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.



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

Section D: System Operations

Once this Extended Solution is installed and enabled, all jobs will be setup to use normal pricing procedures for Inventory items. Click the 'More...' button on the Job Masterfile Maintenance Main tab to change the Pricing Method you wish to use to Normal Job Cost Price, Retail, Standard, or Sales Order.

The screenshot displays the 'Job Masterfile Maintenance' application window. The main form contains the following fields and values:

- Job No.: EEC2140
- Description: Saddleback-Hospital Remodel
- Customer No.: 01-SADDLE (Saddleback Community Hospital)
- Job Address: 1234 Olive Heights Rd., Orange, CA
- Contact: Mike Shapiro
- Phone: (714) 633-2571
- Estimator: JACOBS, Manager: ELLIOTT
- Contract No.: 2250-RTJ, Date: 04/25/2003
- Job Type: 001 (Contract Billing)
- Acctg Method: Completed Contract
- Bill Method: Time and Material, Retention %: 20.00%
- Job Status: Open, Status Date: 05/31/2003

The 'Pricing Method Entry' dialog box is overlaid on the main form, showing a dropdown menu with the following options: Normal, Retail, Standard, and Sales Order. The 'Normal' option is selected. The dialog also includes an 'OK' button and a 'Select a pricing method' field.

Based on the option selected, the standard job cost price would be overridden with the Retail, Standard or Sales Order price when the issued item is billed during normal Job Cost Billing. The Sales Order price will not re-calculate if the quantity is changed in Job Billing.

When Using Sales Order Pricing

If you elect to use Sales Order pricing, the same hierarchy used by Sales Order (i.e., Contract Pricing, Item Pricing, Price Code Pricing) will be employed during the billing. When determining the hierarchy for Sales Order Pricing, the Customer Number used will be the one referenced for the job and the Price level will be the one referenced in the Customer Masterfile. As is true with Sales Order, if no other pricing method is setup for an item, this Extended Solution will use an item's Standard Price when billed.

- Make sure the cost type is set up to be billed in detail in Job Cost Options.
- The Cost Code/Cost Type on the job needs to be billable using the bill method 'Unit Price.'
- The Bill Method on the job needs to be Time and Material.
- This Extended Solution only affects the pricing of I/M items issued from inventory, not items received through P/O.

Visual Integrator

The files listed below have been added or changed in the Data Dictionary by this Extended Solution for Visual Integrator purposes.

New File: *Field:*

JC.JOBS_II INV_PRICE_METH

The Data Dictionary may contain other files and data fields that are not available without their corresponding Sage Software Extended Solutions installed.

Crystal Reports

The files listed below have been added or changed in the Crystal Dictionaries by this Extended Solution for Crystal Reports purposes. Any additions or changes to the Crystal Dictionaries will be incorporated into your system after you set up the Extended Solution or when you use the Star Part (*PART) option from a menu.

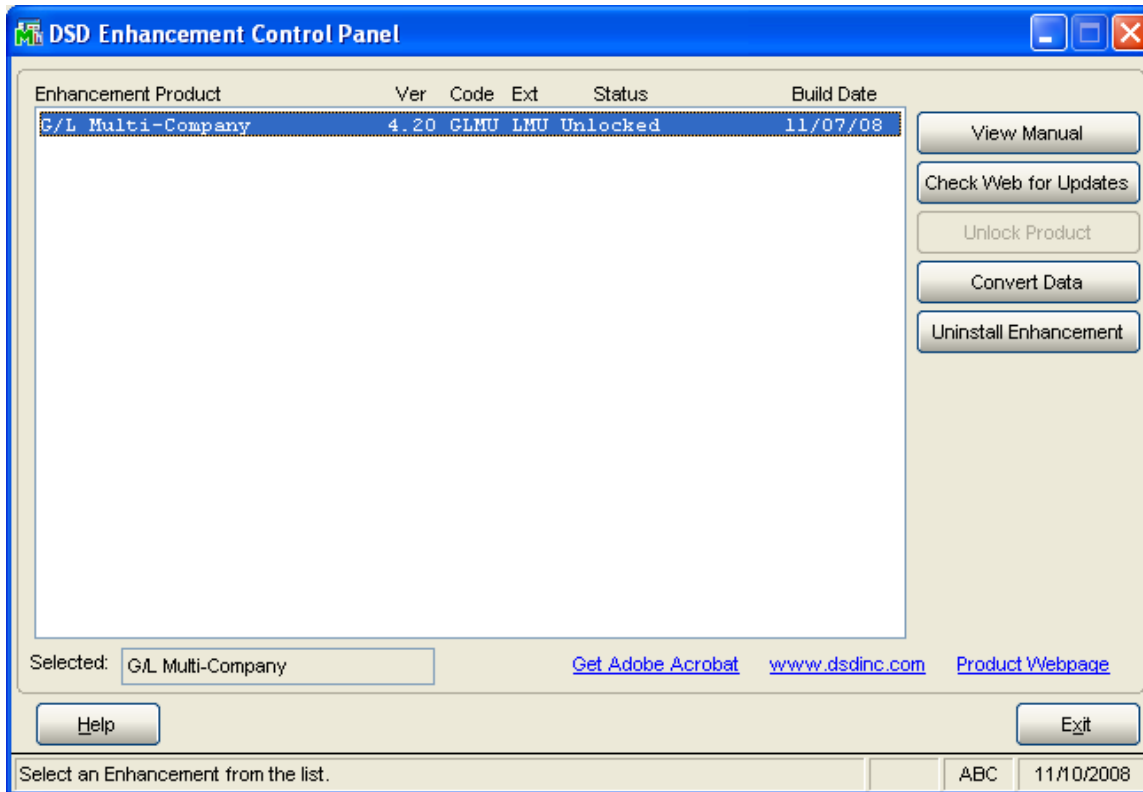
File: *Description* *Field:*

JC_A1 Job Masterfile 2 InvPriceMeth

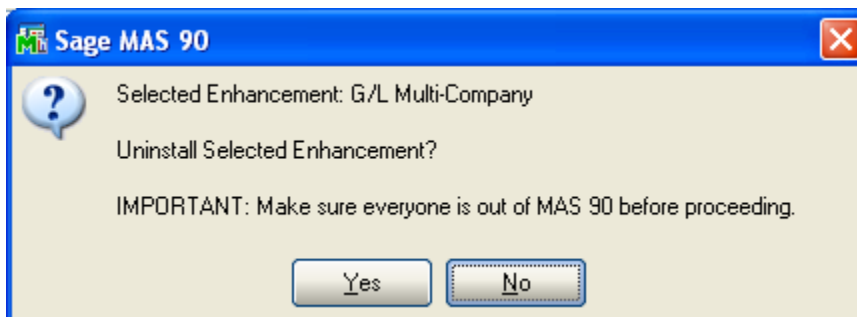
Be aware that the Crystal Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

Section E: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your MAS 90/200 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.

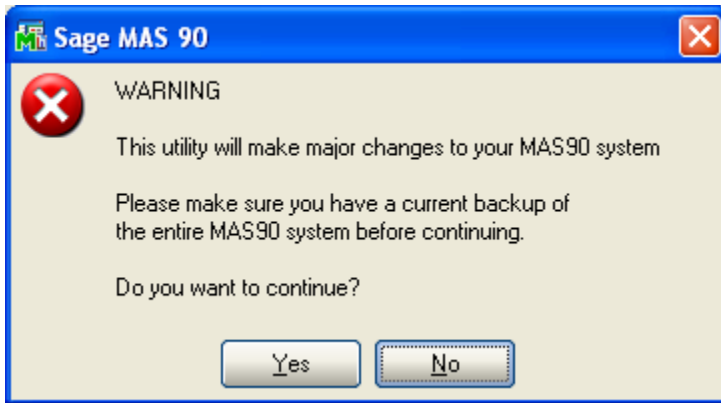


When accessing the **DSD Utility Suite**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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

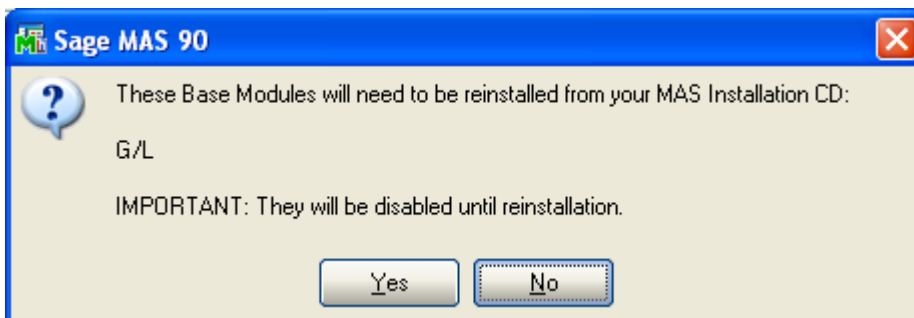
The following message box will appear, to remind you that a complete backup of your entire MAS90 system should be completed prior to uninstalling a DSD product.



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

After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard MAS 90/200 modules, followed by reinstallation of MAS Service Packs / Updates, if applicable.

The following message box will appear, and will display which of those specific MAS 90/200 modules you must reinstall afterwards.

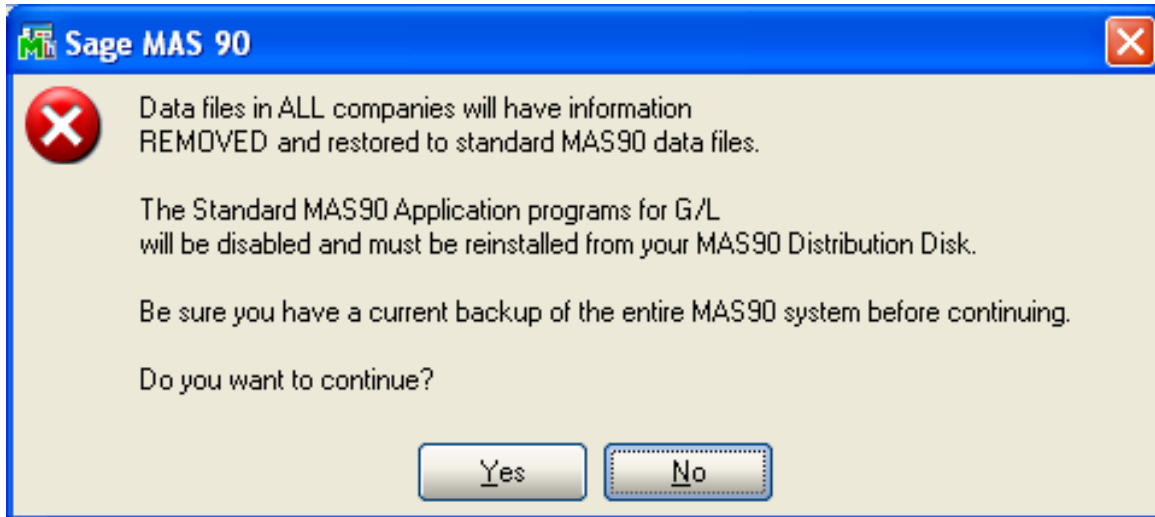


Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

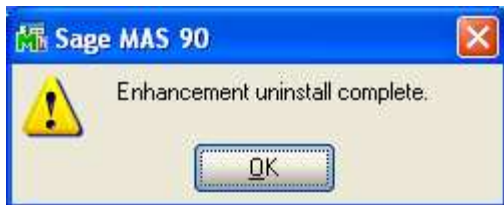
The following message box will appear, displaying the final warning message.

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 MAS 90/200 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 MAS 90/200 modules
- Reinstall the latest MAS 90/200 Service Pack/Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard MAS 90/200 module(s).

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Fax Transmittal Form

To:	<i>DSD Business Systems Customer Service</i>		Fax:	<i>858/550-4900</i>
From:	Name:		Phone:	
	Company:		Fax:	
Date:	/ /	# Pgs Including this Page:		
Subject:	Check One: <input type="checkbox"/> Product Problem <input type="checkbox"/> Suggestions			
Product:	<i>J000 Inventory Price Transfer</i>		Version:	<i>4.40</i>

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