

DSD Business Systems

Sage 100 Enhancements

CIDM

Lot/Serial InstaDocs

Version 6.20





Information in this document is subject to change without notice.

Copyright 1993-2024, DSD Business Systems All rights reserved.

I/M InstaDocs User's Manual Version 6.20

21 February, 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

Trademarks

ProvideX[®] is a Trademark of Sage Software.

Windows is a trademark of Microsoft Corporation.

Sage 100[®] is a registered trademark of Sage Software.

PXPlus [®] is a registered trademark of PVX Plus technologies

All other product names and brand names are service marks, and/or trademarks or registered trademarks of their respective companies.

This documentation and the software described herein, is prepared and published under license. Sage Software has not tested or verified either the software or any representation in this documentation regarding the software. Sage Software does not make any warranty with respect to either this documentation or the software described herein, and specifically disclaims any warranty, express or implied, with respect hereto, including the warranties of fitness for a particular purpose and merchantability.

Lot/Serial InstaDocs Table of Contents

SECTION A: INTRODUCTION	4
Web Resources	4
SUPPORT	
CIDM LOT/SERIAL INSTADOCS FEATURES	5
SECTION B: GETTING STARTED	6
Required Levels	6
INSTALLATION	6
DSD ENHANCEMENT CONTROL PANEL	8
SECTION C: SETUP	10
Сомратівішту	10
INSTADOCS WORKSTATION SETUP – SAGE 100 ADVANCED AND PREMIUM VERSIONS ONLY	
INSTADOCS SETUP OPTIONS	
INSTADOCS SECURITY	11
Microsoft's One Drive™ integration	11
SECTION D: SYSTEM OPERATIONS	12
INTEGRATION WITH IMDM INVENTORY INSTADOCS	12
LOT/SERIAL NUMBER DISTRIBUTION	
Tagging a Document	
Searching for a Document	
Archiving a Document ITEM MAINTENANCE / COST DETAIL PANEL	
Lot/Serial Inquiry	
INSTADOCS SUPERSEARCH	
INSTADOCS SUPERSEARCH	
SECTION E: UNINSTALL DSD ENHANCEMENTS	20

3

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

CIDM InstaDocs:

http://www.dsdinc.com/enhancement/imdm-instadocs

The product web page contains:

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

Support

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

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

Error number. Program name. Line number. Program version. Exact sequence that caused the error, including menus and menu selections.

Other pertinent information.

If leaving a message or faxing, please include:

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

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

CIDM Lot/Serial InstaDocs Features

InstaDocs allows electronic documents to be stored, viewed and accessed within Sage 100 ERP. It is the first and only document management solution to be embedded within Sage 100 ERP. This unique electronic document storage solution provides easy access of documents relating to specific records.

The CIDM Lot/Serial InstaDocs is an extension to the IMDM Inventory InstaDocs, and allows for document management for Lot/Serial Items in the Inventory module. The Documents Panel is embedded into Lot Serial Number Distribution (all data entries), Item Maintenance and Inquiry.

As each record is accessed, the documents that correspond to that record are displayed. The user has the ability to drag and drop documents, select documents to edit, and tag documents with unlimited keywords. Users can then search all stored documents based on those specific keywords. *InstaDocs* **Search** allows users to search all documents based on File Name, Keywords, and Document Source.

With *InstaDocs* Role Security enabled, you can define which users/roles can View, Open, Email, Delete, and Drag and Drop documents within the *InstaDocs* Documents Panel.

With InstaDocs, all documents are at your fingertips!

Section B: Getting Started

CAUTION

• If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.

• Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.

• Check with DSD before installing more than one Enhancement.

Required Levels

Sage 100	Module	Required
Module	Required	Level
C/I	Y	6.20

Installation

- 1. Back-up: Exit all Sage 100 sessions. Back-up existing Sage 100 data.
- 2. Check Levels: Sage 100 module levels must match those listed above.
- 3. Run Enhancement Setup Program: Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.
- 4. Send your Sage Serial Number to your DSD Representative: Send your Sage Serial Number to your DSD representative in order for us to send you back the encrypted keys to unlock your system. This serial number can be found in Library Master\Setup\System Configuration, Tab 3. Registration as Serial Number.
- 5. Re-Start Sage 100: Sage 100 will be updated.
- 6. Unlock the Enhancement: DSD Enhancements must be unlocked to run. When any part of the Enhancement is run for the first time, the DSD Enhancement License Agreement and Activation window will appear. Follow the steps shown on that window. You can click the Help button for more detailed instructions.

Note: On the next page is a screenshot of the DSD Enhancement License Agreement and Activation window.

After accepting the License Agreement, you can then select the type of unlocking that you'd prefer. The choices are File, Web, Demo and Manual Entry.

File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

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

- The Sage 100 system that is being used must have web access for this option to be effective.
- You can send your Sage Serial Number to your DSD Enhancements sales representative.

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

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

Manual Entry Unlock: If you want to unlock a single enhancement using a

sos DSD Enhancement License Agreement and Activation License Agreement ^ YOU MUST READ THIS AGREEMENT COMPLETELY AND AGREE BEFORE PROCEEDING. SCROLL THROUGH THIS AGREEMENT USING THE SLIDER CONTROL IMPORTANT: THIS SOFTWARE IS LICENSED BY DSD BUSINESS SYSTEMS, INC. TO CUSTOMERS FOR THEIR USE ONLY IN ACCORDANCE WITH THE TERMS SET FORTH IS THIS CUSTOMER LICENSE AGREEMENT. OPENING OR USING THIS PACKAGE CONSTITUTES ACCEPTANCE OF THESE TERMS. IF THE TERMS OF THIS LICENSE ARE NOT ACCEPTABLE, THE CUSTOMER MAY OBTAIN A FULL REFUND OF ANY MONEY PAID IF THIS UNUSED, UNOPENED PACKAGE IS RETURNED WITHIN TEN (10) DAYS TO THE DEALER FROM WHICH IT WAS ACQUIRED Agree to License Agreement 3 Call DSD at 858-550-5900 Agree Disagree Have this infomation ready: End User Name DSD Business Systems Serial Number 0555188 Select Unlocking Type O Web O File Enter the following from DSD O Demo Manual Entry Activation Key: Click to Unlock: Unlock Product Help Exit DSD ABX 12/30/2016

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 onscreen instructions to complete data conversion. You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.



×

DSD Enhancement Control Panel

Starting with version 3.61, all DSD Enhancement products include DSD's Enhancement Control Panel. The **DSD Enhancement Control Panel is accessed from the Library Master Utilities menu**.

The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired task.

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

Enhancement Product	Ver	Code Ext	Status	Build Date	MP Expir	e Date
MBIM Multi-Bin	5.10		I Not Unlocked	12/30/2016		
Selected: MBM Multi⊦Bin						
	ck Product			www.dsdinc.com		
View Manual Unlo	ck Product All Products			www.dsdinc.com Product Webpage		

and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

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

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

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

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

lom	ipany Code S	election				_	×
	Company	Company Name	Activated	Converted	Convert		
1	ABC	ABC Distribution and Service Corp.	7	I			6
2	ABX	American Business Expressions		I			
3	XYZ	XYZ Manufacturing Company		I			

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 <u>Uninstall DSD</u> <u>Enhancements</u>)

Section C: Setup

Compatibility

InstaDocs is not compatible with Windows O/S versions 2003 (server) or XP. Windows Vista or higher is required.

InstaDocs Workstation Setup – Sage 100 Advanced and Premium Versions Only

The DLL Components required for each workstation will be copied automatically from the server on the initial load of an InstaDocs screen, and the necessary Window's registration performed. Should this process fail, for Window's security reasons or otherwise, a DLL registration error will result, requiring this process to be performed manually. To perform this process manually, do the following:

- 1. Copy the DSDDocuments.dll and REGDM.BAT files from the ..\MAS90\Home directory on the server, to the directory of the same name on the workstation.
- 2. Open a Command Prompt as Administrator.
- 3. Change the current directory to the workstation's MAS90\Home location.
- 4. Enter: REGDM.BAT

InstaDocs Setup Options

I/M InstaDocs Setup Options has an "Enable Lot/Serial Instadocs" Checkbox

Default Path C:\?!ONSTAL Enable Archive Documents Image: Comparison of the path of the pa	Enable Security		
Default Archive Path C:\INSTADDCSARCHIVE\ Image: Second	Default Path C:\710INSTAV		e
Default Archive Path C:\INSTADDCSARCHIVE\ Image: Second	Enable Archive Documents		
Default View Details 👻	Default Archive Path C:\INSTADOCSARCHIVE		<u>e</u>
	Naming Convention For item Directory	Rem Number	•

InstaDocs Security

For *InstaDocs* Security please refer to Inventory InstaDocs (IMDM) user manual.

Microsoft's One Drive™ integration

Microsoft's One Drive[™] can be obtained on the One Drive website: <u>https://onedrive.live.com</u>.

After signup and purchase, be sure to download the install to enable One Drive[™] on your network or workstation. After installation, you will have the ability to set the One Drive[™] as your Default Path in InstaDocs Options.

The One Drive[™] mobile device application is also available for download, which enables you to preview documents remotely.

Section D: System Operations

Integration with IMDM Inventory InstaDocs

Important: All InstaDocs documents that are for Lot/Serial Numbers are saved into the Inventory InstaDocs document directory, and are tagged with the Lot/Serial Number. When a document is dragged/dropped or copy/pasted to the InstaDocs panel for Lot/Serial Number allocation, that document will appear in Inventory Item Maintenance / Inquiry.

Lot/Serial Number Distribution

The changes to the Lot/Serial Distribution panel are visible to ALL Sage 100 modules that have Lot/Serial distribution. The InstaDocs "Magic Wand" **button** has been added to right side of the distribution grid on the Lot/Serial Distribution panel and will only be enabled when a Lot/Serial line is highlighted in the distribution panel.

When this button is selected, a new InstaDocs Panel will be displayed, with all features that are available in other InstaDocs panels. All documents placed into this panel will be saved to the IMDM Item Document Directory for that Item Code, and auto-tagged with the Lot/Serial Number. The InstaDocs panel will display all documents in the Item Directory that have that Lot/Serial tag.

A new "InstaDocs" **button** will be added to TOP-RIGHT of the distribution panel on the Lot/Serial Distribution panel. When this button is selected, a InstaDocs Panel will be displayed. All documents placed into this InstaDocs panel will be saved to the IMDM Document Directory for that Item Code, and auto-tagged with **ALL LOT/SERIAL NUMBERS that are on the Distribution Grid.**

	Lot Number	Available	Distribute			-
1	JAN10	75.00	1.00			
2		.00	.00			
						₩ - Σ &
	I	Distribution Balance	1.00]		
					<u>о</u> к	Cancel 🕜

Tagging a Document

On the right of the *InstaDocs* Display Panel is the **P** Tag button. A file, or multiple files, can be selected, and then the Tag Button can be pressed to display the *InstaDocs* Tag Entry panel:

	Tag	Comment	User Created	Date/Time Created	
1	NEEDS MANAGEMENT APPROVAL	Approval needed from Jon Reiter	DSD	10/14/2019 04:26:28 PM	
2	٩				

- Single file tagging: When a single file is selected to tag, the *InstaDocs* Tag Entry panel will display all existing tags and will allow addition of new ones.
- Multiple file tagging: When multiple files are selected to tag, the *InstaDocs* Tag Entry panel will NOT display existing tags and will allow addition of new ones to be applied to all files selected.

Unlimited tags can be added, and existing tags can be deleted. Template Tags that are setup in *InstaDocs* **Options** can be accessed by selecting the Lookup Button, or any word or phrase may be entered as the tag. Tagging of a file allows for searching of files by tags that have been added to documents.

All tags will have system-generated **User Created** and **Date/Time Created** fields added. The Date/Time is based on when the tag was created.

Comment: A comment may be entered for each tag. Once the Comment is added, and saved, it cannot be changed.

Searching for a Document

On the right of the *InstaDocs* Display Panel is the A Search button. Selecting this button will display the *InstaDocs* Search Panel.

Selection Grid: Select the Search Values for Tag and File Name.

Source: Narrow a search by selecting the Source of where the document was added into the *InstaDocs* **Display Panel**. This includes Item Maintenance, Invoice Entry, and Check Entry.

Search All Directories: Select this Checkbox to search in **all** *InstaDocs* directories for the tagged documents. UnCheck this Checkbox to only search in the specific Item's directory.

Select Field	Operand		Value		Source	All	
Тад	All	-					
File Name	All	•					
					Sear	ch	
cument Directory							
ile Name	Dire	ectory		Tag	Source Code	e Document Type	
ile Name	Dire	ectory		Tag	Source Code	e Document Type	
ile Name	Dire	ectory		Tag	Source Code	e Document Type	÷
ile Name	Dire	ectory		Tag	Source Code	e Document Type	
ile Name	Dire	ectory		Tag	Source Cod	e Document Type	÷
ile Name	Dire	ectory		Tag	Source Cod	e Document Type	÷
ile Name	Dire	ectory		Tag	Source Cod	e Document Type	÷
file Name	Dire	ectory		Tag	Source Cod	e Document Type	÷

Search Button: After completing the search criteria, select the Search button to do the search.

Search Display Panel: This panel will display the documents found in the search. The directory path is also displayed. Double-click on the row in the **Search Display Panel** to **open** the document.

Tag Button: Highlight a row, and then select the **≥** Tag button to review the tags for a specific document. The deletion of tags and addition of new ones is available.

Open Button: Highlight a row, and then select this button to open the document. Open a document my double-clicking he document in the **Search Display Panel.**

Directory Button: Highlight a row, and then select this button to open the directory of the file in a new panel.

Copy Document: This button will be enabled when the list box is populated after a Search is completed. When selected, a new **Document Copy** popup panel will be displayed

S Do	cument Copy				
Docum	ent Directory				
	Select	File Name	Directory	Tag	^
1		01AIRWAY_0000000014.PDF	C:\710INSTA\01AIRWAY\	000000014	
2		TC50610.PDF	C:\710INSTA\01AIRWAY\	000000014	
3		01AIRWAY_0000000015.PDF	C:\710INSTA\01AIRWAY\	000000015	
4		A082510.DOC	C:\710INSTA\01AIRWAY\	000000015	
5		Q090530.PDF	C:\INSTADOCSARCHIVE\01AIRWAY\	000000015	
6		SMSM620.PDF	C:\710INSTA\01AIRWAY\	000000015	
7		01AIRWAY_0000000016.PDF	C:\710INSTA\01AIRWAY\	0000000016	
8		A112510.PDF	C:\710INSTA\01AIRWAY\	000000016	
9		IMPC710 (1).PDF	C:\710INSTA\01AIRWAY\	0000001611	
10		0000123.PDF	C:\710INSTA\01ABF\	0000123	
11		A076610.DOC	C:\710INSTA\01ABF\	0000123	
12		0000182.PDF	C:\710INSTA\01ABF\	0000182	
13		A079620.PDF	C:\USERS\ASHLEY UNGER\ONEDRIVE	. 0000182	
14		0000183.PDF	C:\710INSTA\01ABF\	0000183	
		T050040 D00	04740BICT 4104 4 DE	0000402	~

Directory to Copy to – this field allows entry of a directory path to copy files to. A Lookup Button will allow for navigation to a directory.

Selection Panel – this panel will display all documents that were displayed in the Super Search results, with the following columns:

- **Select** this column is a checkbox, and enabled for the user to Select/Clear which documents to copy
- File Name (disabled)
- Directory (disabled)
- Tag (disabled)

Select All button – selecting this button will check the Select checkbox for all entries.

Clear All button – selecting this button will uncheck the Select checkbox for all entries.

Cancel button – this will cancel the process, and exit back to the Super Search panel.

Proceed button – when selected, the documents selected will be copied from the source directories to the "Directory to Copy To" directory. After the documents are copied, the user will be prompted "Copy Complete", and the panel will be closed, and the user will be taken back to the Super Search panel.

Archiving a Document

On the right of the *InstaDocs* Display Panel is the display the *InstaDocs* Archive Files Panel.

Archive button. Selecting this button will

15

urrent Directory C:\710INSTA\01AIRWAY\			Archive Directory C:\INSTADOCSARCHIVE\01	AIRWAYN
Current File Name	File Date		Archive File Name	File Date
A085440.DOC	11/4/2010 7:49:02	₽	A076610.pdf	6/7/2021 9:51:06 AM
A085440.pdf	11/4/2010 7:48:26	4	A079510.pdf	5/19/2014 4:00:28
A085440P2.DOC	8/30/2010 3:09:24	4	A079610.doc	9/18/2019 8:04:09
A085440P2.pdf	8/30/2010 3:09:15		A079610.pdf	6/7/2021 9:51:06 AM
A085450.DOC	6/22/2012 8:35:07		A079620.doc	6/7/2021 9:51:06 AM
			A079620.pdf	6/7/2021 9:51:06 AM
			A082450.DOC	12/3/2012 5:09:29
			A082450.pdf	12/3/2012 5:09:08
			A082500.DOC	11/4/2013 8:18:11
			A082500.pdf	11/4/2013 8:18:27

Current Directory: The current directory section displays all documents in the current directory.

Archive Directory: The archive directory section dislplays all documents in the archive directory.

Arrows: Selection of a document or multiple documents can then be moved by using the arrows to move the document between directories. The Proceed button then confirms the document move. The cancel button will cancel any moves between directories. Document tags will also be updated when documents are moved between directories.

Item Maintenance / Cost Detail Panel

The InstaDocs Tab on Item Maintenance Panel will include documents related to Lot/Serial entries.

Item Code Description	1001-HO		LETTER FLE W/O LK	_9, % № 4 ₽		Cop	y <u>F</u> rom	Renum <u>b</u> er	More.	
<u>1</u> . Mair		Addition			ō. Transactions	<u>6</u> . Orders	<u>7</u> . Co	st Detail	<u>8</u> . InstaD	ocs
Docume	ent Director	C 17	10INSTA\1001-HON-H252					1	è +	
	Directory	-	SERSVASHLEY UNGERION		SSOCIATES, INC		STADOC			
View	•									
Name		Size	Туре	Modified						R
O A082	2620.pdf		Chrome HTML Document	6/7/2021 9:51	AM					ห
										2
										*
										8
Directory	Current	t	•							
Directory	Current	1	•							
	Current	ł	•			Accent	Cance		ete 🕰	
Directory	Current	t	•			Accept	Cance	el <u>D</u> el	ete 🔒	⊘.:
	Current	t	•			Accept	Cance	el <u>D</u> el	ete 🔒	@ .:
	Current	t	•			Accept	Cance	91 Del	ete 🔒	?

The InstaDocs "Magic Wand" **button** has been added to right side of the Lot/Serial display panel. When this button is selected, a new InstaDocs Panel will display. You are able to drag/drop or copy/paste documents to this panel. All documents placed into this panel will be saved to the IMDM Document Directory for that Item Code, and auto-tagged with the Lot/Serial Number.

The InstaDocs panel will display all documents in the Item Directory that have that Lot/Serial tag.

			0						
m Code	2480-8-50 DESK FILE 8" CAP 50		Q_ % 			Copy From	n Renum <u>b</u> e	er Mor	re
scription <u>1</u> . Mair		3. Quantity	4. Histor	y <u>5</u> . Transa	ctions <u>6</u> . (Orders 7	. Cost Detail	8. Inst	aDocs
Waashau		CENTRAL MA	DEHOUSE				Mahaati		
Warehou		CENTRAL WA					Valuati		
Whse	Description Lot No.		Receipt Date	Receipt No.	Quantity	Unit Cost	Extension		-
	CENTRAL WA 101		5/31/2025	G001008	9,694.00	15.453	149,801.38	15.	×
	CENTRAL WA 10210		5/31/2025	G001007	200.00	15.453	3,090.60	15.	
	CENTRAL WA JAN10		1/25/2025	RC-0111	325.00	15.800	5,135.00	15.	4
	CENTRAL WA MAR10 CENTRAL WA MAY20		3/25/2025 5/31/2025	RC-0225 G001013	850.00 300.00	15.453 15.810	13,135.05 4,743.01	15. 15.	
۲					_			>	
	Item Maintenance (ABC) 8	3/18/2023	0 %						
Item (Desc	Item Maintenance (ABC) 8 Code 2480-8-50 DESK FILE 8" CAP 1. Main 2. Additiona	50	P		tions <u>6</u> . Or	Copy <u>F</u> rom ders <u>7</u> . Co	Renum <u>b</u> er	More	
Item (Desc	Code 2480-8-50 cription DESK FILE 8" CAP 1. Main 2. Additional /arehouse 000 Q []	50 I <u>3</u> . Quantit All CENTRAL V	ty <u>4</u> . Histo	ory <u>5</u> . Transad	ctions <u>6</u> . On	ders <u>7</u> . Co	Renum <u>b</u> er ost Detail <u>8</u> . Valuation	More . InstaDocs	
ltem (Desc	Code 2480-8-50 DESK FILE 8" CAP 1. Main 2. Additiona Varehouse 000 Q .	50 I <u>3</u> . Quantit All CENTRAL V t No.	VAREHOUSE Receipt Date	ry <u>5</u> . Transac Receipt No.	ctions <u>6</u> . On Quantity	ders <u>7</u> . Co Unit Cost	Renumber ost Detail 8 Valuation 1 Extension	More InstaDocs Lot Item ())	•
ltem (Desc	Code 2480-8-50 DESK FILE 8" CAP 1. Main 2. Additiona /arehouse 000 Q . Whse Description Lo 000 CENTRAL WA 10	50 3. Quantit All CENTRAL V t No. 1	VAREHOUSE Receipt Date 5/31/2025	ry <u>5</u> . Transad Receipt No. G001008	Quantity 9,694.00	ders <u>7</u> . Co Unit Cost 15.453 14	Renumber ost Detail 8 Valuation Extension 49,801.38	More InstaDocs Lot Item ())	•
ltem (Desc	Code 2480-8-50 DESK FILE 8" CAP 1. Main 2. Additiona /arehouse 000 Q . Whse Description Lo 000 CENTRAL WA 10	50 3. Quantit All CENTRAL V t No. 1 210	VAREHOUSE Receipt Date 5/31/2025 5/31/2025	Stransaction Receipt No. G001008 G001007	Cotions 6. Or Quantity 9,694.00 200.00 200.00	ders Z. Co Unit Cost 15.453 14 15.453	Renumber est Detail Valuation Extension 49,801.38 3,090.60	More InstaDocs	
Item (Desc	Code 2480-8-50 DESK FILE 8" CAP 1. Main 2. Additiona /arehouse 000 Q . Whse Description Lo 000 CENTRAL WA 10	50 3. Quantit CENTRAL V t No. 1 210 N10	VAREHOUSE Receipt Date 5/31/2025	ry <u>5</u> . Transad Receipt No. G001008	Quantity 9,694.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8 Valuation Extension 49,801.38	More InstaDocs Lot Item ())	•
Item (Desc	Code 2480-8-50 DESK FILE 8" CAP 1. Main 2. Additiona Varehouse 000 Q Whse Description Lo 000 CENTRAL WA 10 000 CENTRAL WA JA 000 CENTRAL WA MA InstaDocs	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10	VAREHOUSE Receipt Date 5/31/2025 5/31/2025 3/25/2025	5. Transact Receipt No. G001008 G001007 RC-0111	Quantity 9,694.00 200.00 325.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation Extension 49,801.38 3,090.60 5,135.00 13,135.05	More InstaDocs Lot tem (15. 15. 15. 15. X	
Item (Desc	Code 2480-8-50 DESK FILE 8" CAP: 1. Main 2. Additiona Varehouse 000 Q I Whse Description Lo 000 CENTRAL WA 10 000 CENTRAL WA JA 000 CENTRAL WA JA 000 CENTRAL WA MA InstaDocs	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8-	VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025	5. Transact Receipt No. G001008 G001007 RC-0111	Quantity 9,694.00 200.00 325.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot tem 15. 15. 15. X X	•
W	Code 2480-8-50 DESK FILE 8" CAP 1. Main 2. Additiona Varehouse 000 Q Whse Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA JA 000 CENTRAL WA MA InstaDocs Document Directory C.V7 Archive Directory C.V7	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10	VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025	5. Transact Receipt No. G001008 G001007 RC-0111	Quantity 9,694.00 200.00 325.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot tem (15. 15. 15. 15. X	
W	Code 2480-8-50 DESK FILE 8" CAP 1. Main 2. Additiona Varehouse 000 Q Whse Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA JA 000 CENTRAL WA MA InstaDocs Document Directory C.\/7 Archive Directory C.\/7	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH	VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025	Receipt No. G001008 G001007 RC-0111 RC-0225	Quantity 9,694.00 200.00 325.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot tem 15. 15. 15. X X	
W 1	Code 2480-8-50 DESK FILE 8° CAP 1. Main 2. Additiona Arehouse 000 2 3 Whse Description Lo 000 CENTRAL WA 10 000 CENTRAL WA JA 000 CENTRAL WA M# InstaDocs Document Directory C.\7 Archive Directory C.\7 Name Size	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH Type	VAREHOUSE VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025 5/0\ IVE\2480-8-50\	Pry 5. Transact Receipt No. G001008 G001007 RC-0111 RC-0225 Modified	Cuantity 9,694.00 200.00 325.00 850.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot tem 15. 15. 15. X X	
W 1	Code 2480-8-50 DESK FILE 8" CAP 1. Main 2. Additiona Varehouse 000 Q Whse Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA JA 000 CENTRAL WA MA InstaDocs Document Directory C.\/7 Archive Directory C.\/7	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH Type	VAREHOUSE VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025 5/0\ IVE\2480-8-50\	Pry 5. Transact Receipt No. G001008 G001007 RC-0111 RC-0225 Modified	Cuantity 9,694.00 200.00 325.00 850.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot Item () 15. 2 15. 2 15. 2 15. 4 15. 2 15. 4 15. 2 15. 4 15. 2 15. 4 15. 2 15. 4 15. 2 15. 4 15. 4	
W	Code 2480-8-50 DESK FILE 8° CAP 1. Main 2. Additiona Arehouse 000 2 3 Whee Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA MA 1000 CENTRAL WA SA 1000 CENTRAL WA SA	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH Type	VAREHOUSE VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025 5/0\ IVE\2480-8-50\	Pry 5. Transact Receipt No. G001008 G001007 RC-0111 RC-0225 Modified	Cuantity 9,694.00 200.00 325.00 850.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot Item () 15. 15. 15. 15. X X	
W	Code 2480-8-50 DESK FILE 8° CAP 1. Main 2. Additiona Arehouse 000 2 3 Whee Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA MA 1000 CENTRAL WA SA 1000 CENTRAL WA SA	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH Type	VAREHOUSE VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025 5/0\ IVE\2480-8-50\	Pry 5. Transact Receipt No. G001008 G001007 RC-0111 RC-0225 Modified	Cuantity 9,694.00 200.00 325.00 850.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot Item () 15. 2 15. 2 15. 2 15. 4 15. 2 15. 4 15. 2 15. 4 15. 2 15. 4 15. 2 15. 4 15. 2 15. 4 15. 4	
W	Code 2480-8-50 DESK FILE 8° CAP 1. Main 2. Additiona Arehouse 000 2 3 Whee Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA MA 1000 CENTRAL WA SA 1000 CENTRAL WA SA	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH Type	VAREHOUSE VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025 5/0\ IVE\2480-8-50\	Pry 5. Transact Receipt No. G001008 G001007 RC-0111 RC-0225 Modified	Cuantity 9,694.00 200.00 325.00 850.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot Item () 15. 15. 15. 15. X X	
W	Code 2480-8-50 DESK FILE 8° CAP 1. Main 2. Additiona Arehouse 000 2 3 Whee Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA MA 1000 CENTRAL WA SA 1000 CENTRAL WA SA	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH Type	VAREHOUSE VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025 5/0\ IVE\2480-8-50\	Pry 5. Transact Receipt No. G001008 G001007 RC-0111 RC-0225 Modified	Cuantity 9,694.00 200.00 325.00 850.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot Item () 15. 15. 15. 15. X X	
W	Code 2480-8-50 DESK FILE 8° CAP 1. Main 2. Additiona Arehouse 000 2 3 Whee Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA MA 1000 CENTRAL WA SA 1000 CENTRAL WA SA	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH Type	VAREHOUSE VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025 5/0\ IVE\2480-8-50\	Pry 5. Transact Receipt No. G001008 G001007 RC-0111 RC-0225 Modified	Cuantity 9,694.00 200.00 325.00 850.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot Item () 15. 15. 15. 15. X X	
W	Code 2480-8-50 DESK FILE 8° CAP 1. Main 2. Additiona Arehouse 000 2 3 Whee Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA MA 1000 CENTRAL WA SA 1000 CENTRAL WA SA	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH Type	VAREHOUSE VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025 5/0\ IVE\2480-8-50\	Pry 5. Transact Receipt No. G001008 G001007 RC-0111 RC-0225 Modified	Cuantity 9,694.00 200.00 325.00 850.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot Item () 15. 15. 15. 15. X X	
W	Code 2480-8-50 DESK FILE 8° CAP 1. Main 2. Additiona Arehouse 000 2 3 Whee Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA MA 1000 CENTRAL WA SA 1000 CENTRAL WA SA	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH Type	VAREHOUSE VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025 5/0\ IVE\2480-8-50\	Pry 5. Transact Receipt No. G001008 G001007 RC-0111 RC-0225 Modified	Cuantity 9,694.00 200.00 325.00 850.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot Item () 15. 15. 15. 15. X X	
W	Code 2480-8-50 DESK FILE 8° CAP 1. Main 2. Additiona Arehouse 000 2 3 Whee Description Lo 000 CENTRAL WA 10 000 CENTRAL WA 10 000 CENTRAL WA MA 1000 CENTRAL WA SA 1000 CENTRAL WA SA	50 3. Quantit All CENTRAL V t No. 1 210 N10 AR10 10INSTA\2480-8- ISTADOCSARCH Type	VAREHOUSE VAREHOUSE Receipt Date 5/31/2025 5/31/2025 1/25/2025 3/25/2025 5/0\ IVE\2480-8-50\	Pry 5. Transact Receipt No. G001008 G001007 RC-0111 RC-0225 Modified	Cuantity 9,694.00 200.00 325.00 850.00	Unit Cost 15.453 14 15.453 15.800	Renumber ost Detail 8. Valuation 1 Extension 49,801.38 3,090.60 5,135.00 13,135.05 -	More InstaDocs Lot Item () 15. 15. 15. 15. X X	

User's Manual

Lot/Serial Inquiry

A "InstaDocs" **button** has been added to the top-right of the Lot/Serial Inquiry panel. When this button is selected, a new InstaDocs Panel will display. The InstaDocs panel will display all documents in the Item Directory that have that Lot/Serial tag.

ot/Serial Number		01	Inst	aDoc					
m Code	2	480-8-50			DE:	SK FILE 8" C/	AP 50		
rans Date	Туре	Ref No.	Cust/Vendor	Whse	Quantity	Unit Cost	Extension	 	0
5/29/2025	IA	0000009		000	10.00-	15.453	154.53-		2
/31/2025	PO	G001008	01-STEV	000	10,000.00	15.453	154,530.00		2
/31/2025	SO	0100040-IN	01-BRESLIN	000	295.00-	15.453	4,558.64-		
5/31/2025	SO	0100041-IN	01-ABF	000	1.00-	15.453	15.45-		5

The user will be able to drag/drop or copy/paste documents to this panel. All documents placed into this panel will be saved to the IMDM Document Directory for that Item Code, and auto-tagged with the Lot/Serial Number.

S Lot/Serial Inqu	iiry (ABC)	:) 8/18/2023		- 🗆 X	
Lot/Serial Number	101	9, 14 4 F FI		InstaDocs	
Item Code	2480-8-	3-50	DESK FILE 8" CAP 50	0	
S InstaDocs				- 🗆 ×	<
Document Direc	tory C:\	\710INSTA\2480-8-50\		≥ +	
Archive Directo	ry C:\	\INSTADOCSARCHIVE\2480-8-50\	₽ +		
View 🛛 🕶					
Name	Size	2 Type	Modified		
A079610.do	442 KB	Microsoft Word 97 - 2003 Documer	nt 6/7/2021 9:51 AM	م ا	
				60	
				2	
				*	
Directory Curre	nt	•		<u>о</u> к	
nt © 1993-2024 DSD BULotSINES	SS SYSTE	EMS		User's Manua	al
-					

InstaDocs SuperSearch

This Search Program has been added to the Inventory Management Utilities menu, and has the same functionality as the Search Panel outlined in Item Maintenance.

InstaDocs Document Migration Utility

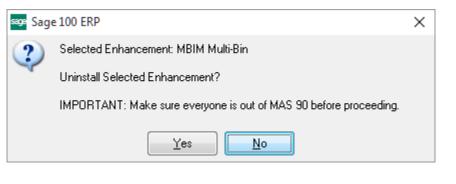
See Inventory InstaDocs User Manual.

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.

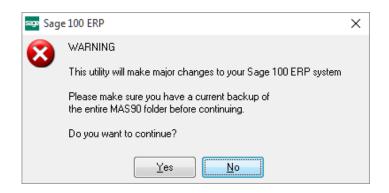
Enhancement Product			Ver Code Ext Status			Status	Build Date			MP Expire Date		
MBIM Mu	ulti-Bin		5.10	MBIM	MBI	No unlocking	req 12	/27/2016				
Selected:	MBIM Multi-Bin											
Viev	v Manual						<u>www.</u>	dsdinc.com				
Ob a shaw	b for Updates	Unlock All F	Products				Produc	ct Webpage	_			
спеск ууе												

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.



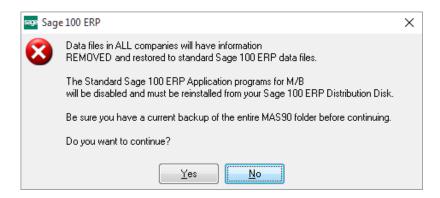
Select **No** to exit the Uninstall Process. Select **Yes** to continue with the Uninstall Process.

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).