



DSD Business Systems

Sage 100 Enhancements

I135

Instant Item Description Key Word Search

IM-1135

Version 7.00



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Instant Item Description Key Word Search User's Manual
Version 7.00

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Table of Contents

SECTION A: INTRODUCTION 4

 WEB RESOURCES.....4

 SUPPORT.....4

 INSTANT ITEM DESCRIPTION KEY WORD SEARCH FEATURES.....5

SECTION B: GETTING STARTED 6

 REQUIRED LEVELS.....6

 INSTALLATION.....6

 DSD ENHANCEMENT CONTROL PANEL.....8

SECTION C: SETUP 10

SECTION D: SYSTEM OPERATIONS 11

 SALES ORDER ENTRY, SO INVOICE ENTRY, AND PURCHASE ORDER ENTRY 11

 SALES ORDER ENTRY AND SALES ORDER INVOICE LINE ENTRY..... 12

 KEY WORD SEARCH INTO STANDARD PRICING AND CUSTOMER PRICING..... 12

SECTION E: UNINSTALL DSD ENHANCEMENTS 14

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*

I135 Instant Item Description Key Word Search:

<http://www.dsdinc.com/enh/pages/I135.htm>

The product web page contains:

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

Support

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

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

- Error number.*
- Program name.*
- Line number.*
- Program version.*
- Exact sequence that caused the error, including menus and menu selections.*
- Other pertinent information.*

If leaving a message or faxing, please include:

Your name.

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

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

Instant Item Description Key Word Search Features

This DSD Extended Solution to the Inventory Management, Sales Order, and Purchase Order modules allows you to search the Extended Item Description in the Inventory Item Lookup. Two options have been added to the Sales Order Inquiry Menu: 'Key Word Search Into Std Pricing' and 'Key Word Search Into Cust Pricing'.

Section B: Getting Started

CAUTION

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

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

- Check with DSD before installing more than one Enhancement.

Required Levels

Sage 100 Module	Module Required	Required Level
I/M	Y	7.00

Installation

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

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

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

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

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

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

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

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

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

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

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

DSD Enhancement Control Panel

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

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

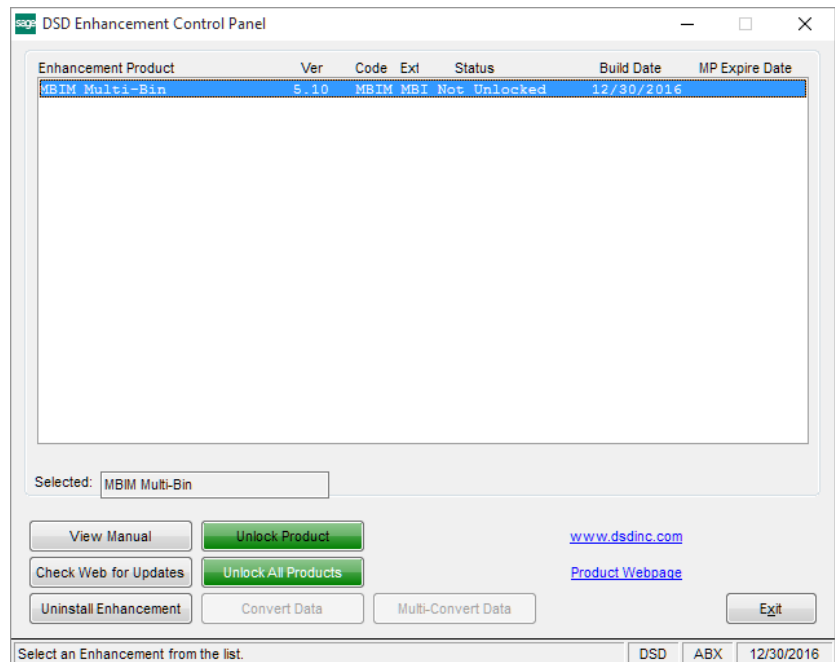
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

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

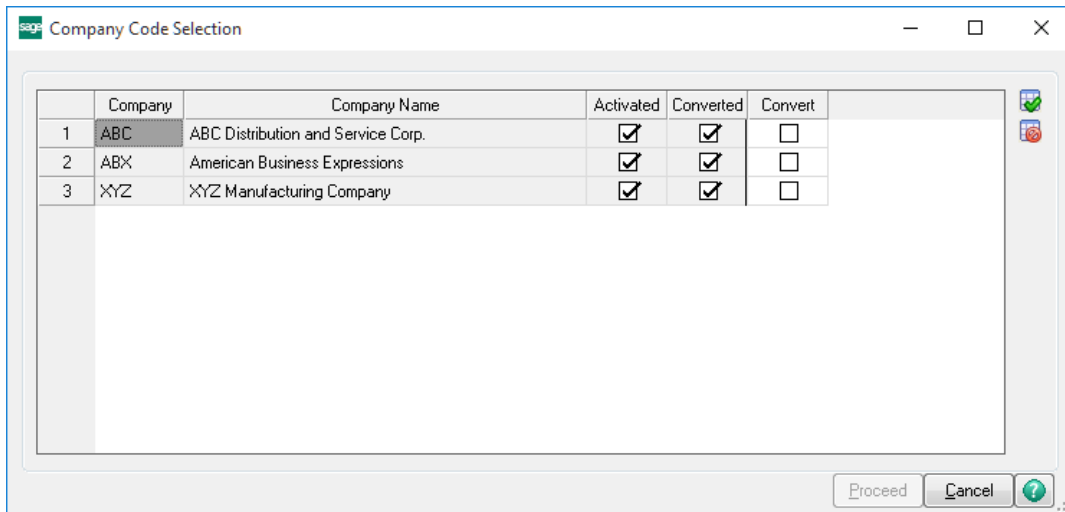
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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

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



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



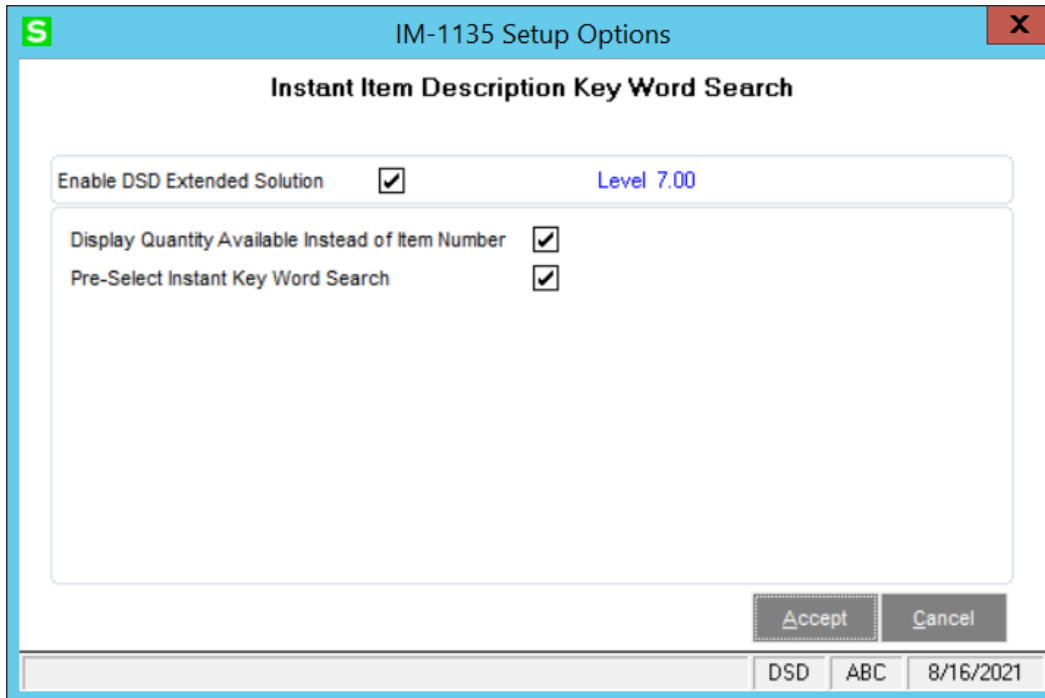
Help: The Help button, located at the bottom right of the window, opens an HTML help file.

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

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system. (for more information see [Uninstall DSD Enhancements](#))

Section C: Setup

Upon completion of software installation, you will need to access the DSD Extended Solutions Setup from the Inventory Management Setup menu. Select this part number and the Setup screen for this Extended Solution will appear. Check the 'Enable DSD Extended Solution' box to activate this Extended Solution.



Answer the following prompts:

Display Qty Available Instead Of Item No: Check this box to show Quantity Available instead of Item Number in 'Key Word Search Into Std Pricing' and the 'Key Word Search Into Cust Pricing' lookups.

Pre-select Instant Key Word Search: Check this box to have the Key Word Search window automatically pop up every time you do Inventory Item Lookup.

A sort file has been created to facilitate the search process. After you enable this Extended Solution, you should rebuild I/M sort files by running the standard Sage 100 Rebuild Sort Files program from the Utilities menu in Library Master.

Role Maintenance

The following Tasks have been added to Sales Order, Inquiry:

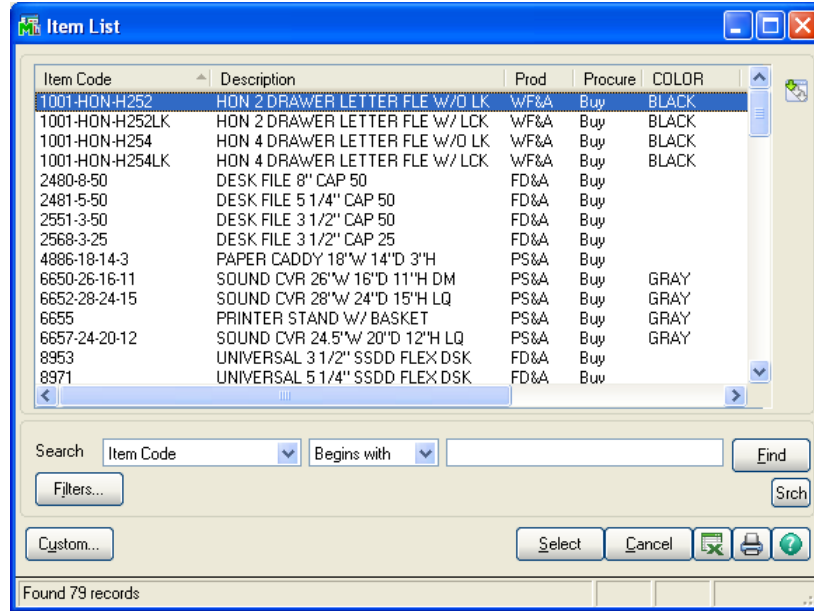
- Key Word Search Into Cust Pricing
- Key Word Search Into Std Pricing

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

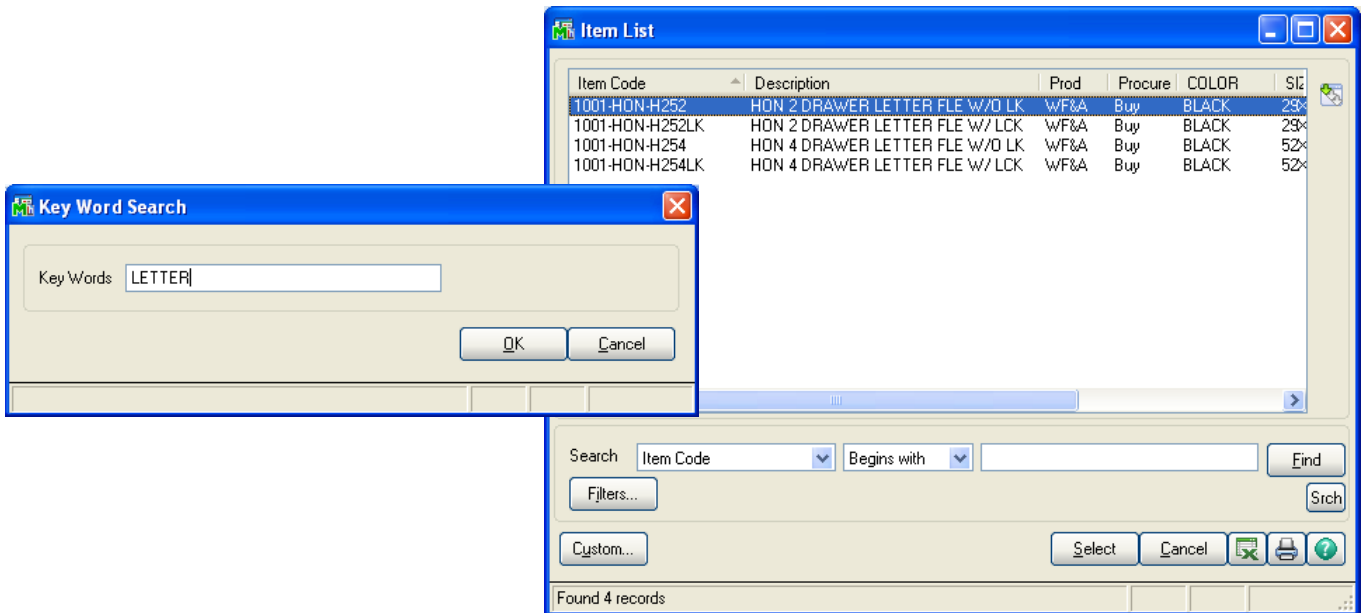
Section D: System Operations

Sales Order Entry, SO Invoice Entry, and Purchase Order Entry

A new 'Srch' button has been added to the Inventory Item Lookup.



To initiate the Key Word Search, click the 'Srch' button and enter up to 30 characters of text that will be used for your description search. You may enter portions of text separated by spaces. The search will include the entire Extended Description.

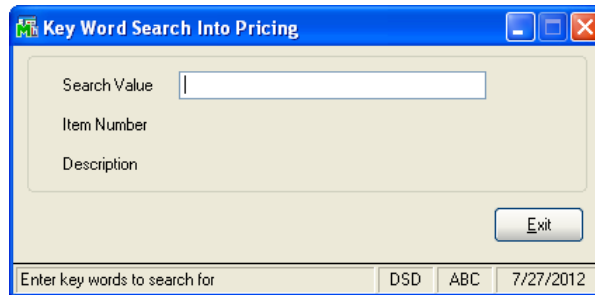


Sales Order Entry and Sales Order Invoice Line Entry

When you drill down to an item via the item number lookup button, then launch Price Lookup from Item Inquiry, the Customer Number from the Order will auto populate the Customer Number field.

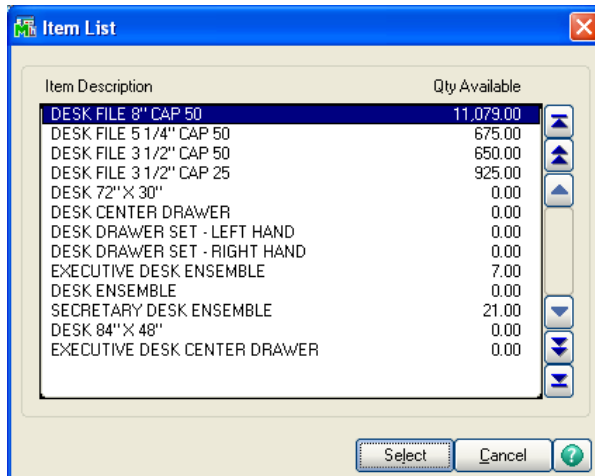
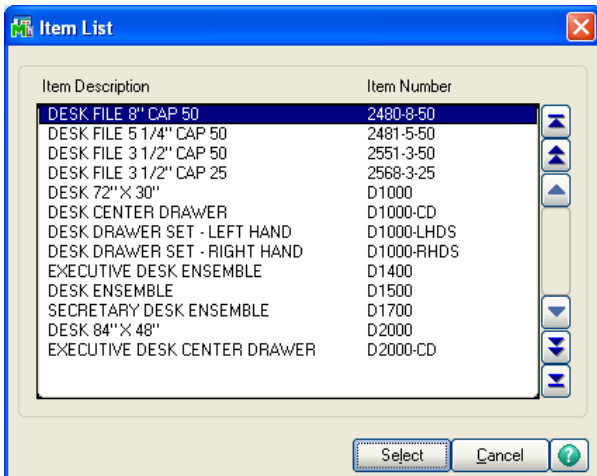
Key Word Search into Standard Pricing and Customer Pricing

Two search options are available from the S/O Inquiry menu: 'Key Word Search Into Std Pricing' and 'Key Word Search Into Cust Pricing'. Both will prompt you for the search value. If there is a single item which matches the Search Value, you will be dropped into the Item Price Lookup with the selected item loaded.



Key Word Search into Standard Pricing will not allow access to the Customer Number field in Item Price Lookup where as Key Word Search into Customer Pricing will allow access to the Customer Number and Price Level fields.

If multiple matches are found, you will be presented with a list of items to choose. The list will include either the Item Number or Quantity Available in the item's default warehouse, depending on your answer to the Setup option 'Display Qty Available instead of Item No'.



The Item Price Lookup has been modified with an 'Inquiry' button. Click the 'Inquiry' button to launch the Inventory Inquiry screen.

Price Lookup

Item Code: 2480-8-50 DESK FILE 8" CAP 50

Price Level: Standard Standard

Pricing Method: Price Override

Standard Price: 34.950 Sale Starting Date: 5/15/2010

Standard Cost: 15.750 Sale Ending Date: 5/31/2010

Sale Price: 33.203

Step	From Quantity	To Quantity	Unit Price	Unit Price
1	1	1	34.950	34.950
2	2	5	31.950	31.950
3	6	99,999,999	30.950	30.950
4				
5				

	Quantity	U/M	Unit Price	Extension
Order	.00	EACH	.000	.00

Inquiry OK

Key Word into Std Pricing

Price Lookup

Item Code: 2480-8-50 DESK FILE 8" CAP 50

Customer No.

Price Level:

Pricing Method:

Standard Price: 34.950 Sale Starting Date: 5/15/2010

Standard Cost: 15.750 Sale Ending Date: 5/31/2010

Sale Price: 33.203

Step	From Quantity	To Quantity	Unit Price	Unit Price
1				
2				
3				
4				
5				

	Quantity	U/M	Unit Price	Extension
Order	.00	EACH	.000	.00

Inquiry OK

Key Word into Customer Pricing

Item Inquiry (ABC) 7/27/2012

Item Code: 2480-8-50 Description: DESK FILE 8" CAP 50

Standard Unit of Measure: EACH

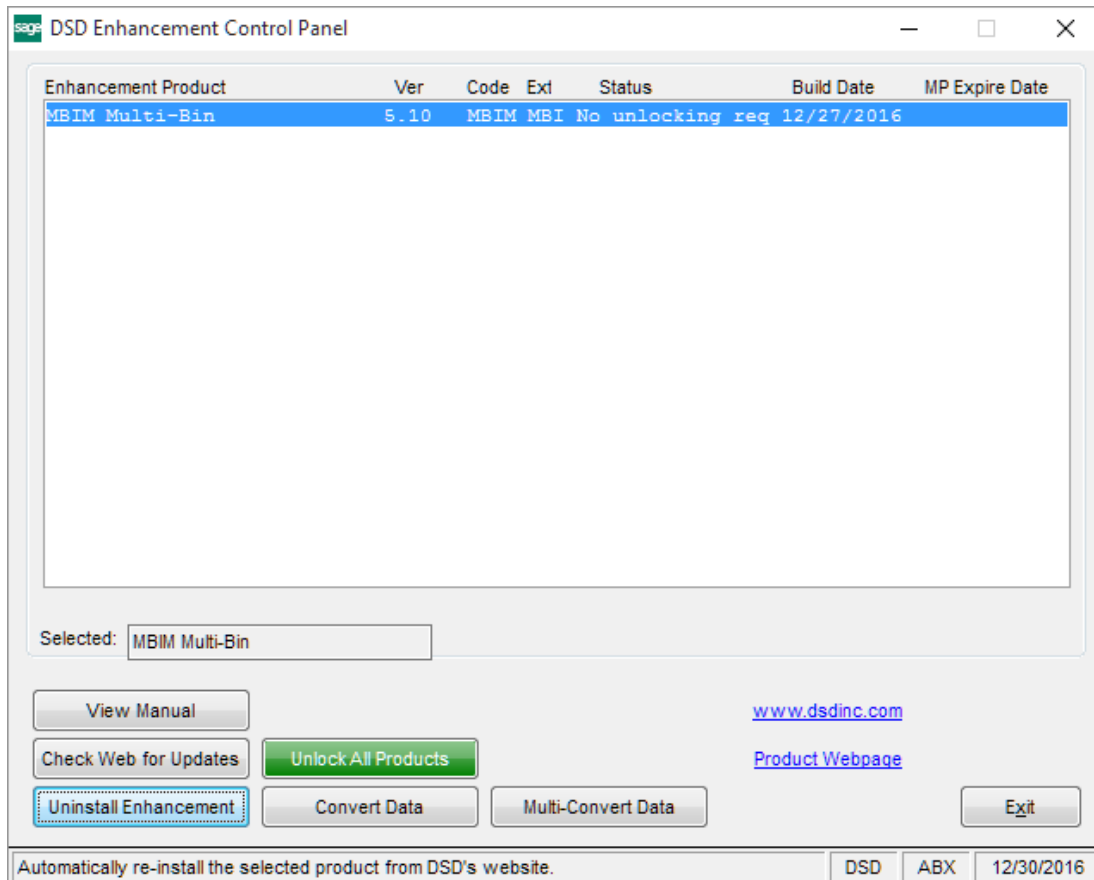
1. Main 2. Additional **3. Quantity** 4. History 5. Transactions 6. Orders 7. Cost Detail

Whse	Description	On Hand	On PO	On SO	On Bk Ord	Committed	Available	In Shipping	On Hand Less SP
000	CENTRAL ...	11,079.00	.00	.00	.00	.00	11,079.00	.00	11,079.00
001	EAST WA...	165.00	.00	.00	.00	.00	165.00	.00	165.00
002	WEST WA...	210.00	.00	100.00	20.00	120.00	90.00	.00	210.00
Totals		11,454.00	.00	100.00	20.00	120.00	11,334.00	.00	11,454.00

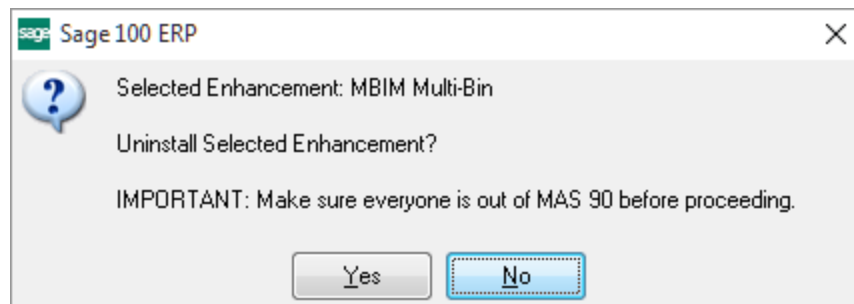
OK

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.

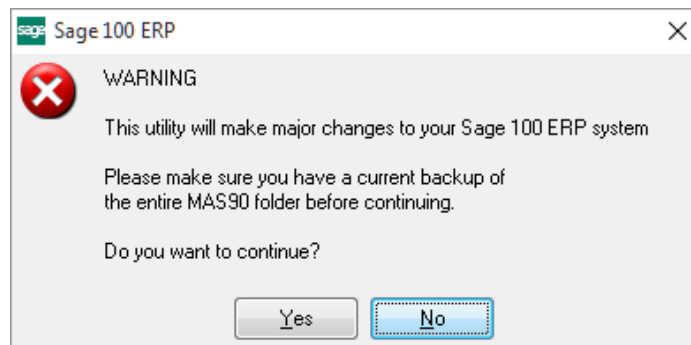


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



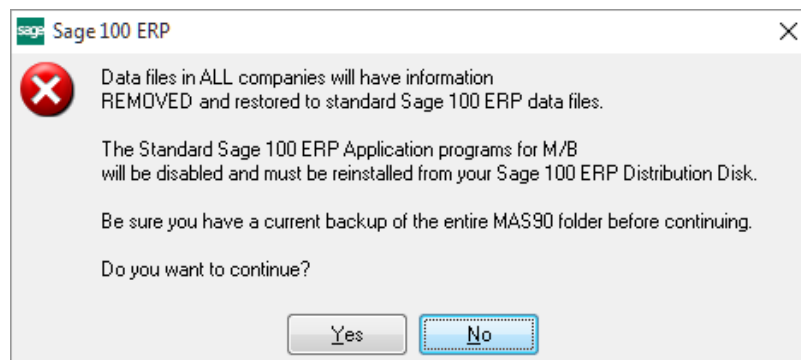
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

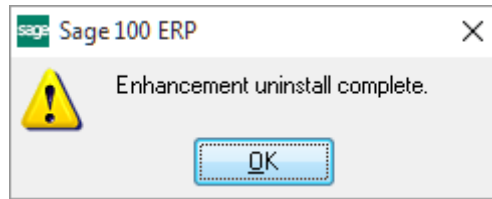
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).