



DSD Business Systems

Sage 100 Enhancements

IMUE

Lot/Serial UDF Edit

Version 7.00



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Lot/Serial UDF Edit User's Manual
Version 7.00

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to Sage 100. For instructions on using Sage 100, refer to the appropriate Sage 100 manual, or call your Sage 100 reseller. DSD Business Systems offers excellent Sage 100 support, at an hourly rate.

Web Resources

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

The Enhancement page contains:

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

IMUE Lot/Serial UDF Edit:

<http://www.dsdinc.com/enhancement/lotserial-udf-edit-2>

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.

Lot/Serial UDF Edit Features

This DSD enhancement allows addition/editing of multiple Lot/Serial UDFs that have already been posted to Inventory.

A new UDF Button has been added to Lot/Serial Distribution that allows for easy editing of multiple Lot/Serial UDFs, as well as Copy From preceding entries.

Note: This enhancement is compatible with MBIM – DSD Multi-bin Inventory Management, however the UDF button will only be available from Lot/Serial Inquiry. It will not be available from within Tier Distribution screens.

Section B: Getting Started



- **If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.**
- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.
- **Check with DSD before installing more than one Enhancement.**

Required Levels

Sage 100 Module	Module Required	Required Level
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.*

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

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 IN 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.

1 Agree to License Agreement
☒ Agree ☐ Disagree

2 Select Unlocking Type
☐ Web ☐ File
☐ Demo ☒ Manual Entry

3 Call DSD at 858-550-5900
Have this information ready: End User Name: DSD Business Systems
Serial Number: 0555188

4 Enter the following from DSD
Activation Key:
Click to Unlock:

DSD ABX 12/30/2016

DSD Conversion Wizard: Step One, Introduction

DSD BUSINESS SYSTEMS

This company's data needs to be converted.
This program will perform the conversion.

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.

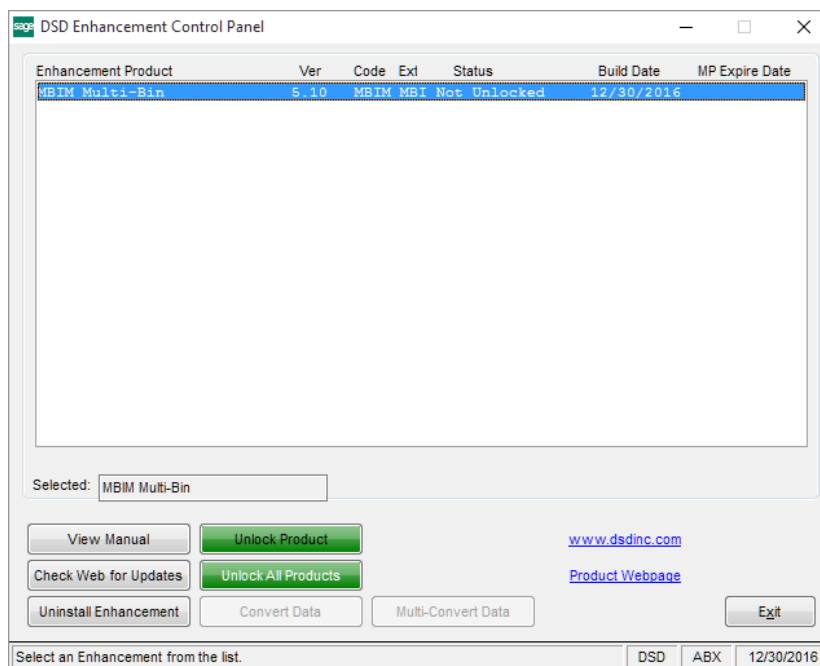
Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

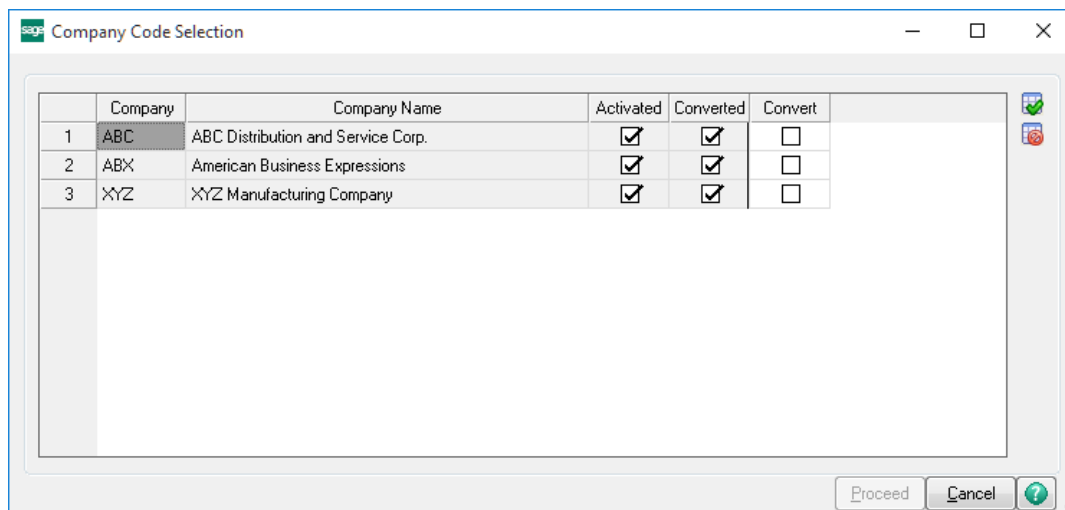
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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.)*





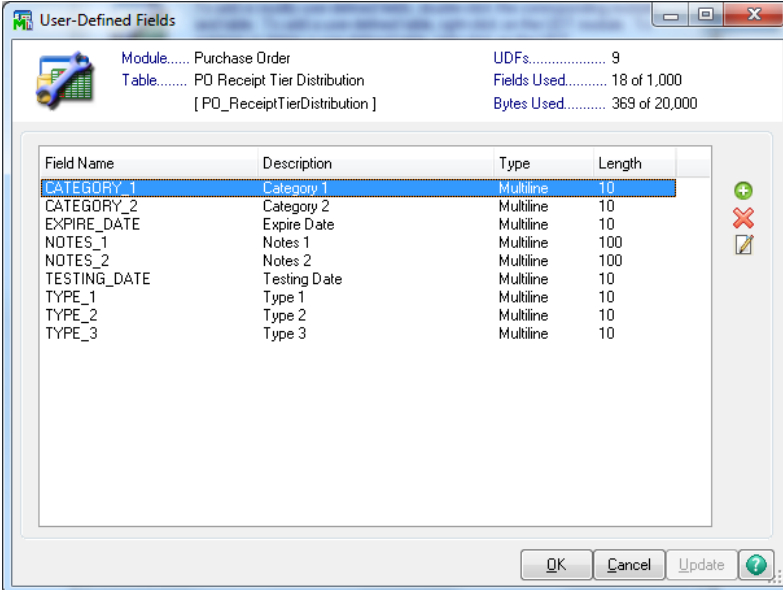
Help: The Help button, located at the bottom right of the window, opens an HTML help file.

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

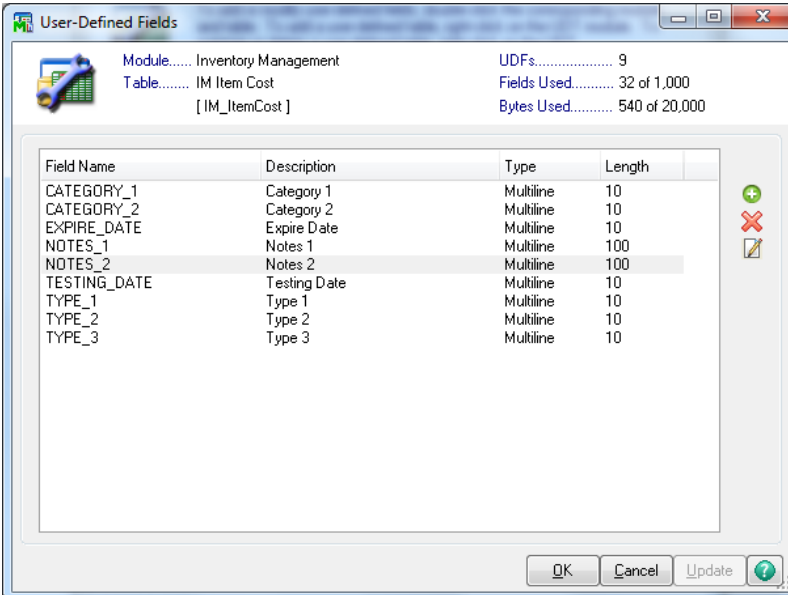
Set up UDFs in PO Receipt Tier Distribution:



The dialog box shows the configuration for User-Defined Fields (UDFs) for the 'PO Receipt Tier Distribution' table. It lists 9 UDFs, all of which are Multiline. The fields are: CATEGORY_1, CATEGORY_2, EXPIRE_DATE, NOTES_1, NOTES_2, TESTING_DATE, TYPE_1, TYPE_2, and TYPE_3. The lengths are 10 for CATEGORY_1, CATEGORY_2, EXPIRE_DATE, TYPE_1, TYPE_2, and TYPE_3; and 100 for NOTES_1, NOTES_2, and TESTING_DATE. The total fields used are 18 of 1,000, and the total bytes used are 369 of 20,000.

Field Name	Description	Type	Length
CATEGORY_1	Category 1	Multiline	10
CATEGORY_2	Category 2	Multiline	10
EXPIRE_DATE	Expire Date	Multiline	10
NOTES_1	Notes 1	Multiline	100
NOTES_2	Notes 2	Multiline	100
TESTING_DATE	Testing Date	Multiline	10
TYPE_1	Type 1	Multiline	10
TYPE_2	Type 2	Multiline	10
TYPE_3	Type 3	Multiline	10

Set up same UDFs in IM_ItemCost:



The dialog box shows the configuration for User-Defined Fields (UDFs) for the 'IM_ItemCost' table. It lists 9 UDFs, all of which are Multiline. The fields are: CATEGORY_1, CATEGORY_2, EXPIRE_DATE, NOTES_1, NOTES_2, TESTING_DATE, TYPE_1, TYPE_2, and TYPE_3. The lengths are 10 for CATEGORY_1, CATEGORY_2, EXPIRE_DATE, TYPE_1, TYPE_2, and TYPE_3; and 100 for NOTES_1, NOTES_2, and TESTING_DATE. The total fields used are 32 of 1,000, and the total bytes used are 540 of 20,000.

Field Name	Description	Type	Length
CATEGORY_1	Category 1	Multiline	10
CATEGORY_2	Category 2	Multiline	10
EXPIRE_DATE	Expire Date	Multiline	10
NOTES_1	Notes 1	Multiline	100
NOTES_2	Notes 2	Multiline	100
TESTING_DATE	Testing Date	Multiline	10
TYPE_1	Type 1	Multiline	10
TYPE_2	Type 2	Multiline	10
TYPE_3	Type 3	Multiline	10

Set the Data Sources appropriately:

Field Name: UDF_TYPE_1
Description: Type 1
Control Type: Multi-Line (selected), Drop-Box, List-Box, Check-Box

Field in Use: No
Bytes Used: 280 of 20,000
Name Space Used: 300
Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names.

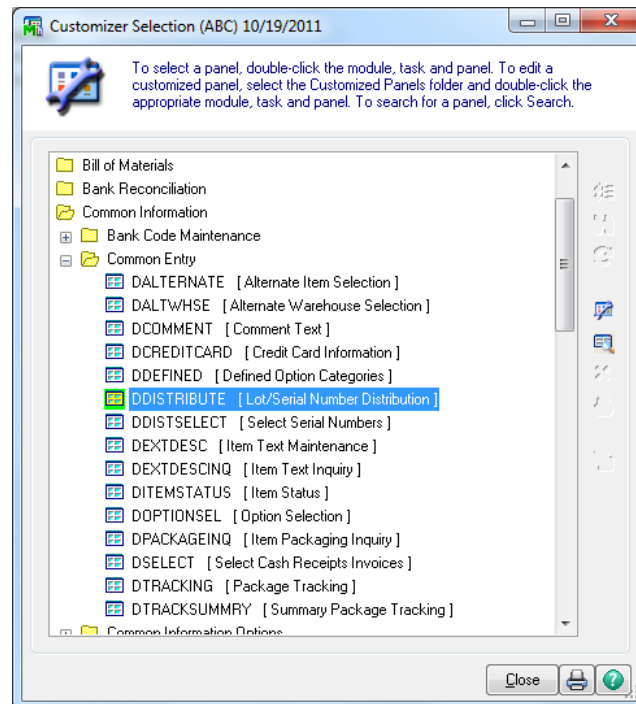
1. Attributes | 2. Validation | 3. Data Sources

Business Object	Select	Data Source	Column	Ignore	Expression	DM
IM_ItemCost_bus	☐					
IM_TransactionRegister_upd	☐					
PO_ReceiptRegister_upd	☒	PO_ReceiptTierDistribution	UDF_TYPE_1	☐		
SO_SalesJournal_upd	☐					
IM_PhysicalCountVarRegister_upd	☐					

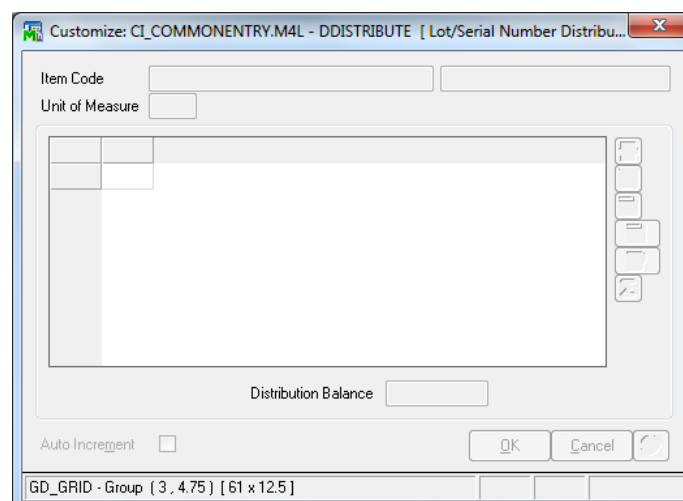
OK Cancel

Add UDF's to PO Receipt

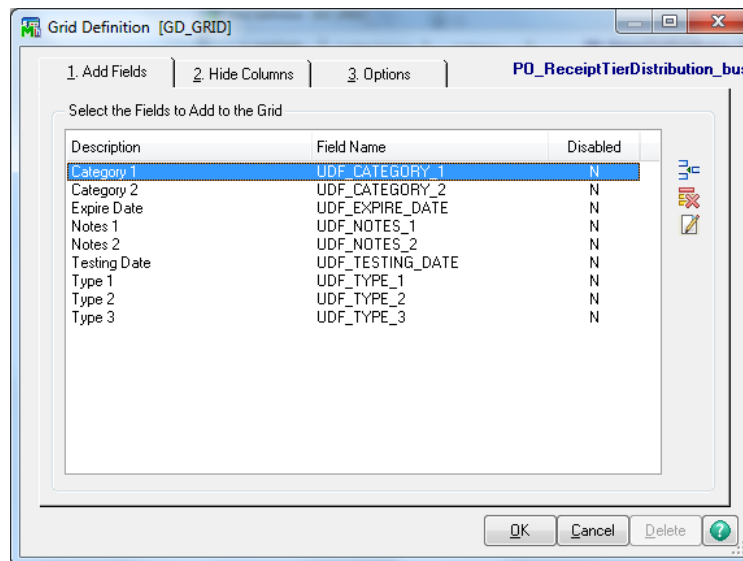
Select Common Information / Common Entry / DDISTRIBUTE:



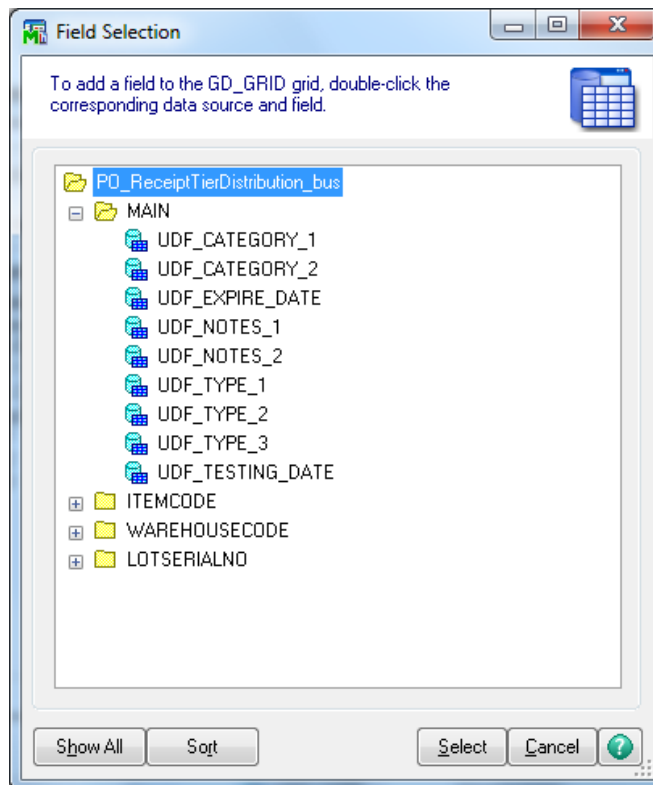
Right-Click on Grid to access UDF Addition:



Select Add Button on Right to add the UDF's to the grid:



When selecting UDFs, select from LOTSERIALNO. (Select the PO_ReceiptTierBistribution_bus.

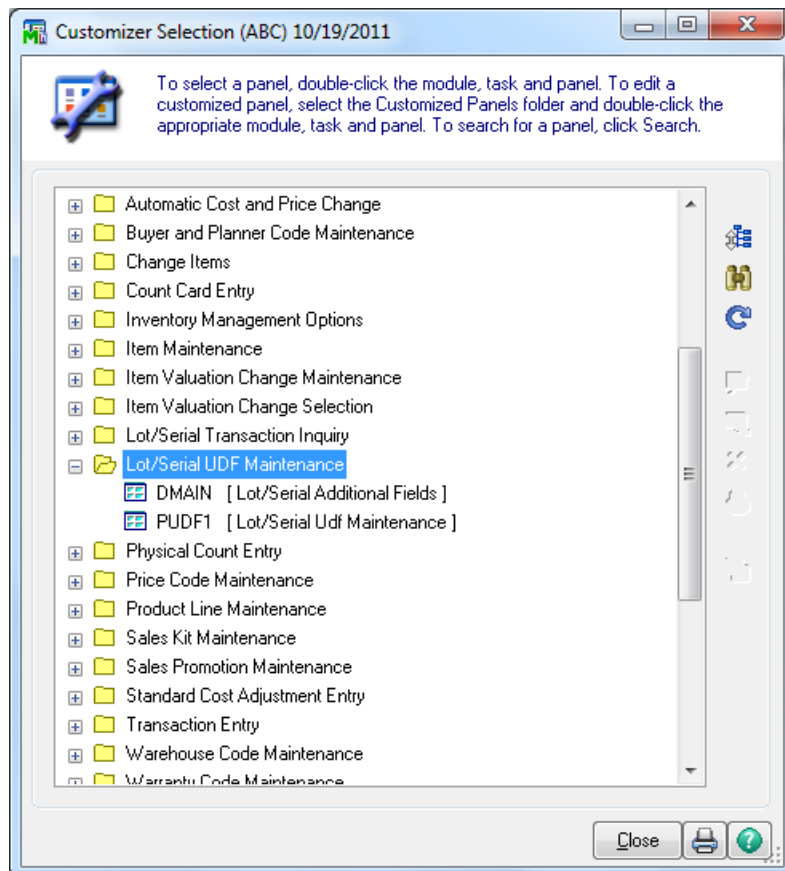


Enter a few POs and ROGs to get the UDF data in place

Verify that the data is in IM_ItemCost before going forward....

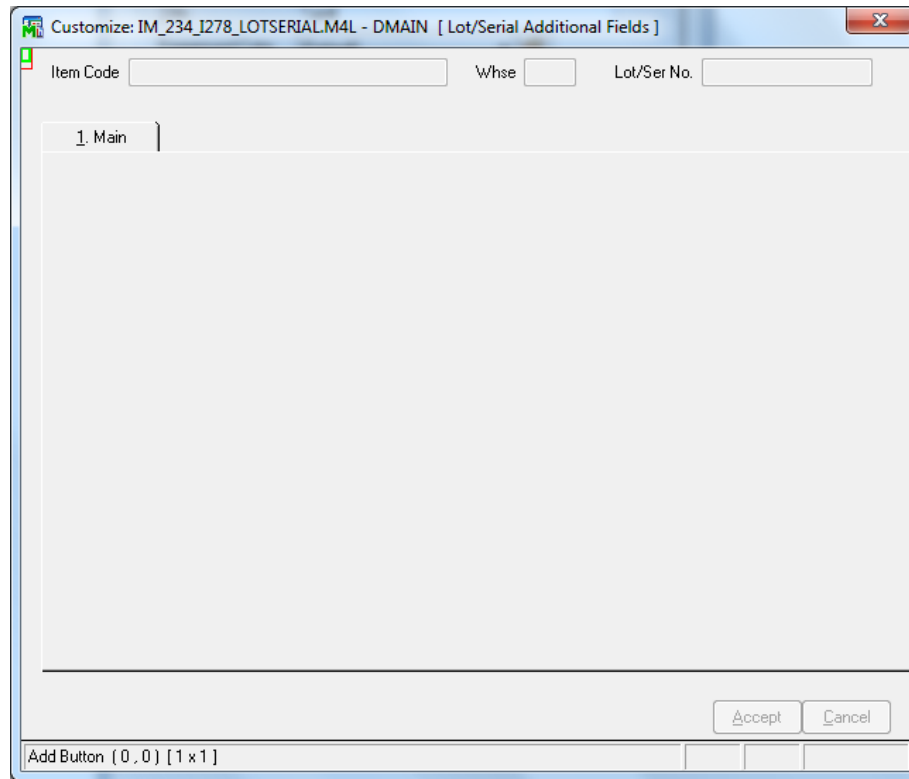
Adding UDF's to the new Lot/Serial UDF Maintenance popup panel

Select the Lot/Serial UDF Maintenance task from Customizer Selection

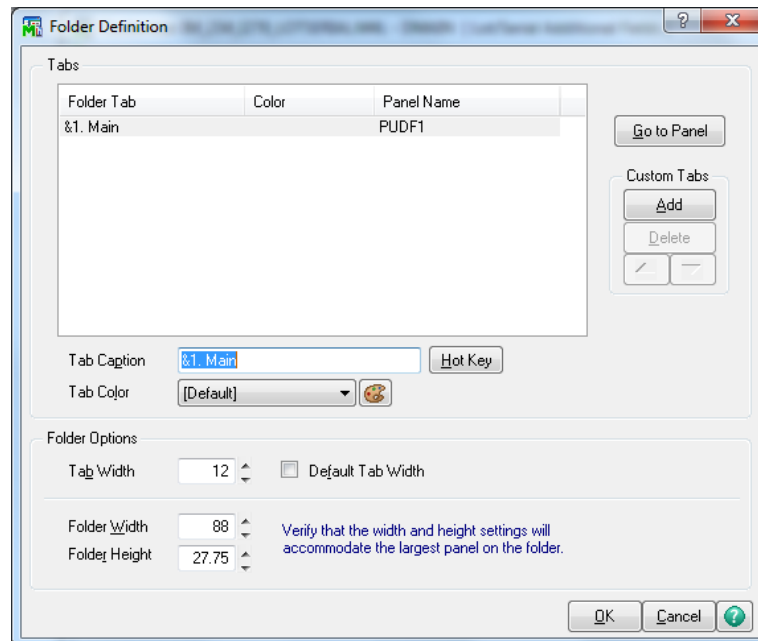


Changing Tab Titles or adding new Tabs

Select DMAIN to edit. The following panel appears:



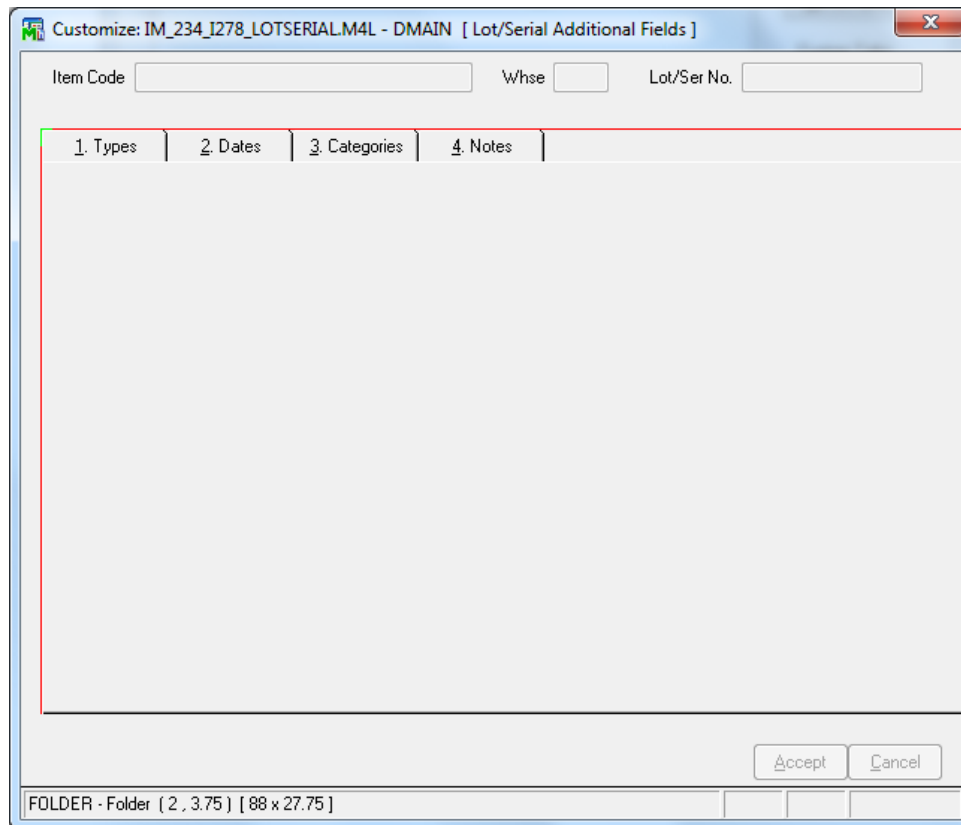
Right-click on the Main Folder to display this panel:



The name of the Tab Caption can be changed. In this example, Tab 1 will be changed from “Main” to “Types”.

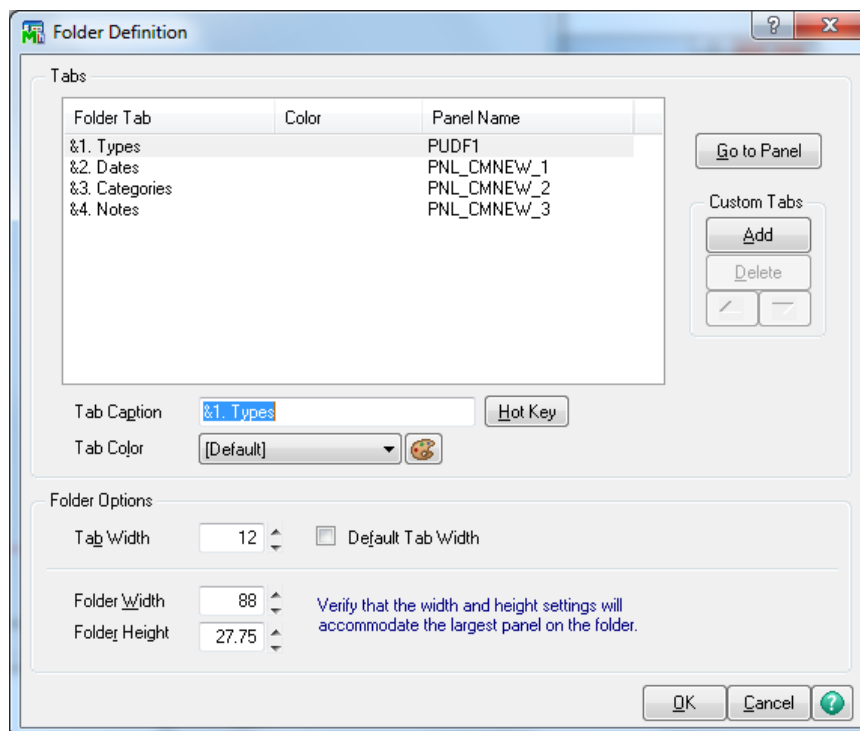
Select the “Add” Button to add new Tabs.

Below is an example of four tabs on the Lot/Serial UDF Maintenance popup panel:

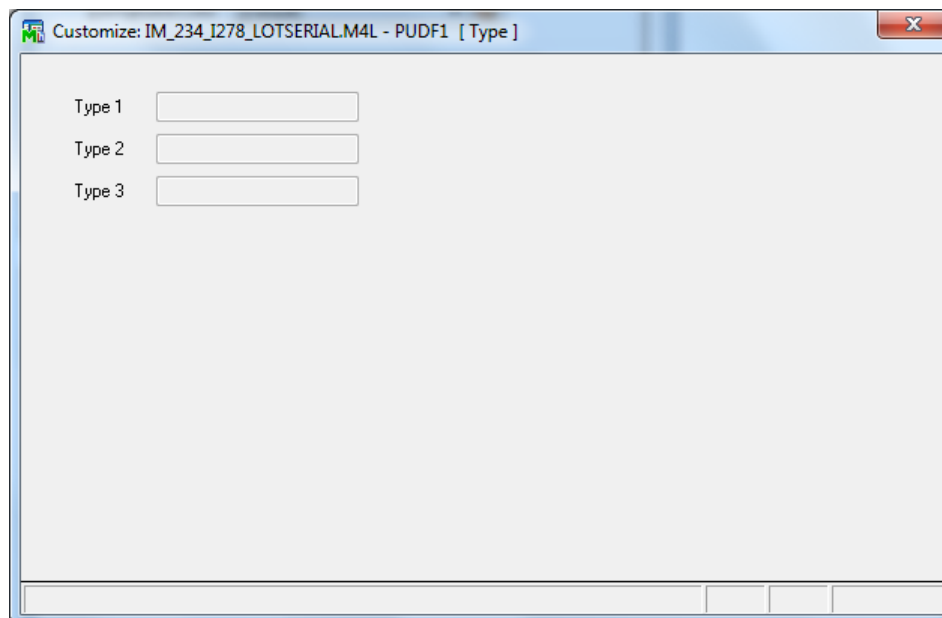


Adding UDF's to the tabs

Select the Tab that you want to add UDF's to and select the "Go to Panel" button on the right.



Add the appropriate UDF's to the Tab

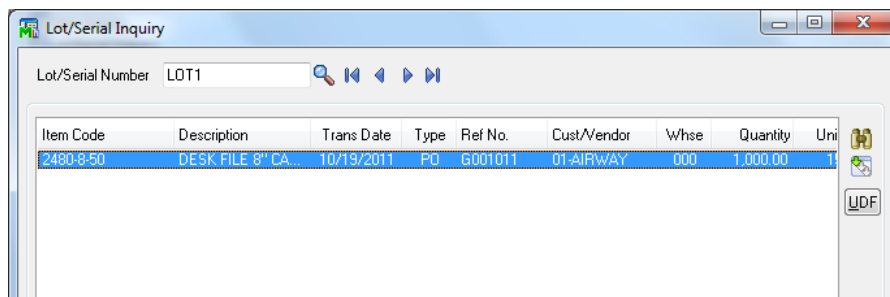


Section D: System Operations

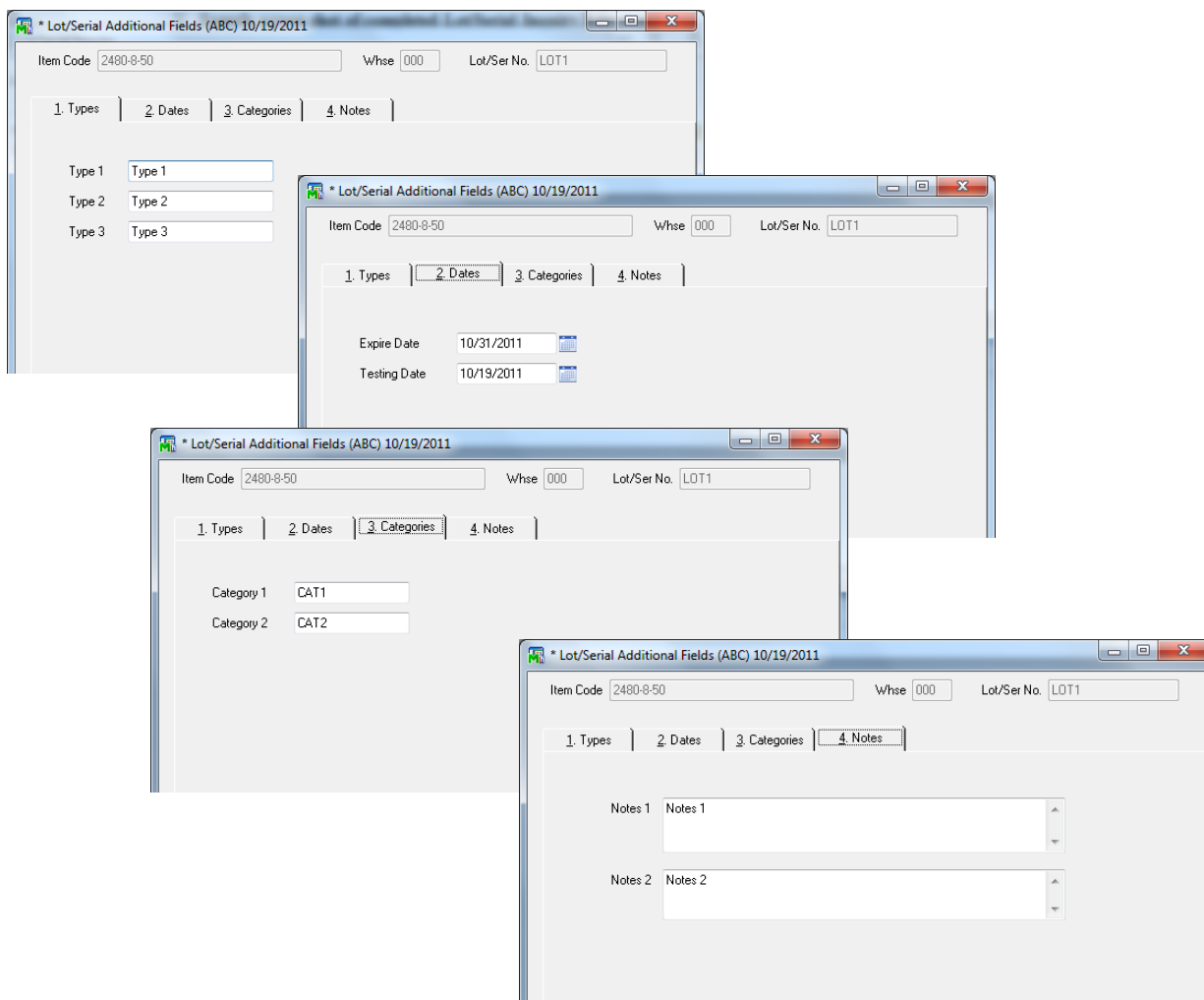
Lot/Serial Inquiry

Select **Lot/Serial Inquiry** from I/M Main Menu.

Select the Lot Number, then select the new UDF button on the right.



The Lot/Serial Additional Fields will be displayed:



Lot/Serial Distribution

A new UDF Button has been added to the Lot/Serial Distribution Panel that can be accessed in P/O Receipt Entry, I/M Transaction Entry, and S/O Invoice Date Entry.

The screenshot shows the 'Lot/Serial Number Distribution' window. At the top, the title bar reads '* Lot/Serial Number Distribution'. Below the title bar, there are two input fields: 'Item Code' with the value '0LOT' and 'Unit of Measure' with the value 'CASE'. The main area contains a table with four columns: 'Lot Number', 'Available', and 'Distribute'. The table has three rows of data. The first row is highlighted with a blue background. To the right of the table, there is a vertical toolbar with icons for adding, deleting, and saving, and a button labeled 'UDF'. Below the table, there is a 'Distribution Balance' field with the value '.00'. At the bottom right, there are 'OK', 'Cancel', and a help icon button.

	Lot Number	Available	Distribute
1	LL1	.00	1.00
2	LL2	.00	2.00
3		.00	.00

Distribution Balance: .00

When the UDF button is selected, the same UDF Panel that is configured for Lot/Serial Inquiry can be accessed here, allowing for simple entry of multiple UDF's. This feature is available if you have already entered the UDF's into the distribution grid for entry, or if you have not.

The screenshot shows the 'Lot/Serial Additional Fields (ABC) 2/16/2015' window. At the top, the title bar reads '* Lot/Serial Additional Fields (ABC) 2/16/2015'. Below the title bar, there are three input fields: 'Item Code' with the value '0LOT', 'Whse' with the value '000', and 'Lot/Ser No.' which is empty. To the right of these fields is a 'Copy From' button. Below the input fields, there is a section labeled '1. Main'. Inside this section, there are two input fields: 'Expire Date' with the value '2/18/2015' and a calendar icon, and 'Lot Size' with the value '2.00'. At the bottom right, there are 'Accept' and 'Cancel' buttons.

Item Code: 0LOT Whse: 000 Lot/Ser No.:

Copy From

1. Main

Expire Date: 2/18/2015

Lot Size: 2.00

Accept Cancel

MultiBin UDF

Setup UDF in MB_BinItem

The 'User-Defined Fields' window shows the configuration for the MB_BinItem table. The module is 'DSD / ScanForce Multi-Bin Advanced'. The table is 'MB Bin Item' with a sub-table '[MB_BinItem]'. The statistics show 1 UDF, 33 of 1,000 fields used, and 527 of 20,000 bytes used. The table below lists the defined fields.

Field Name	Description	Type	Length
TEST	Test	Multiline	10

Buttons at the bottom: OK, Cancel, Update, and a help icon.

In Item Bin Maintenance under the quantity tab a new UDF button has been added to the screen.

The 'Item Bin Maintenance' window for item 1001-HON-H252 (HON 2 DRAWER LETTER FLE W/O LK) at CENTRAL WAREHOUSE. The 'Quantity' tab is active. The table shows bin locations and their quantities. A 'UDF' button is visible on the right side of the table.

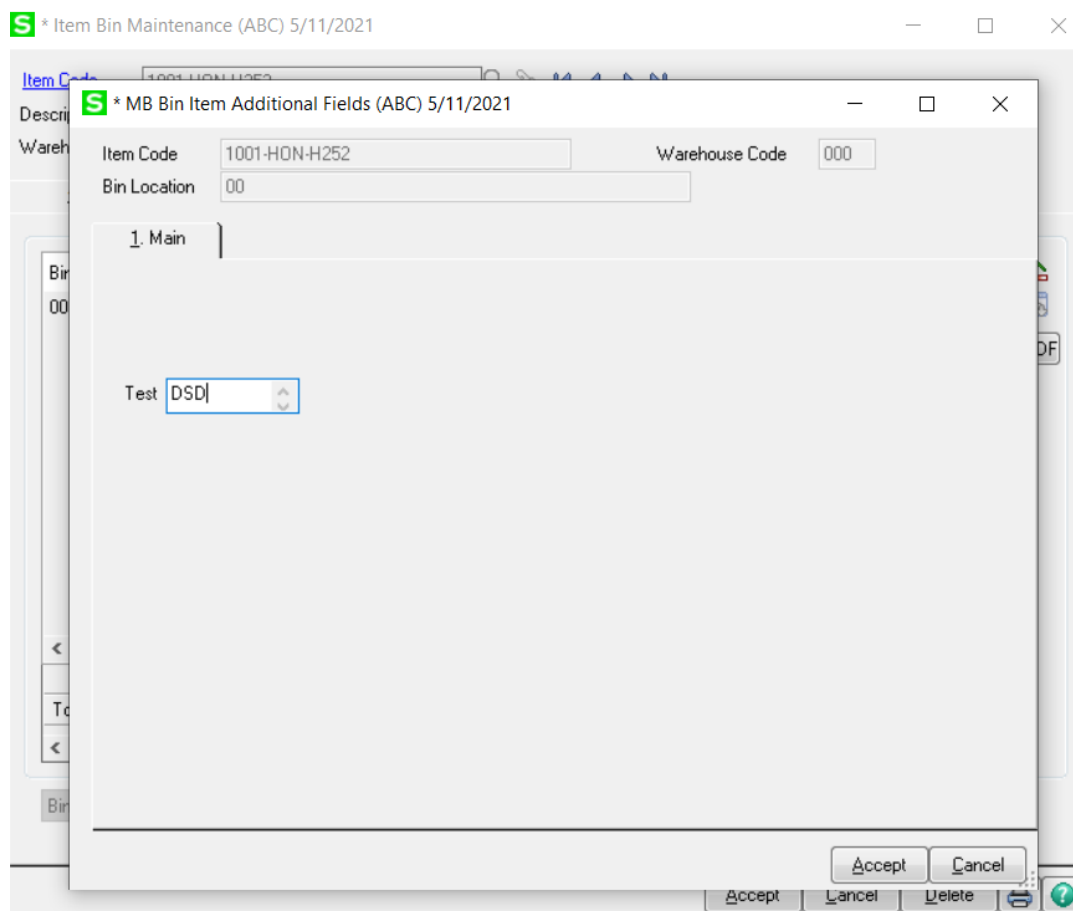
Bin Location	Description	On Hand	PO Receipts	PO Returns	PO Mat Req	IM Transa
00	00	2,677.00	.00	.00	.00	.00

Summary Totals:

	On Hand	On PO Rcpts	On PO Rtns	On PO MR	On IM Trans	On SO/IM Sl	On Repl From	On R
Totals	2,677.00	.00	.00	.00	.00	.00	.00	

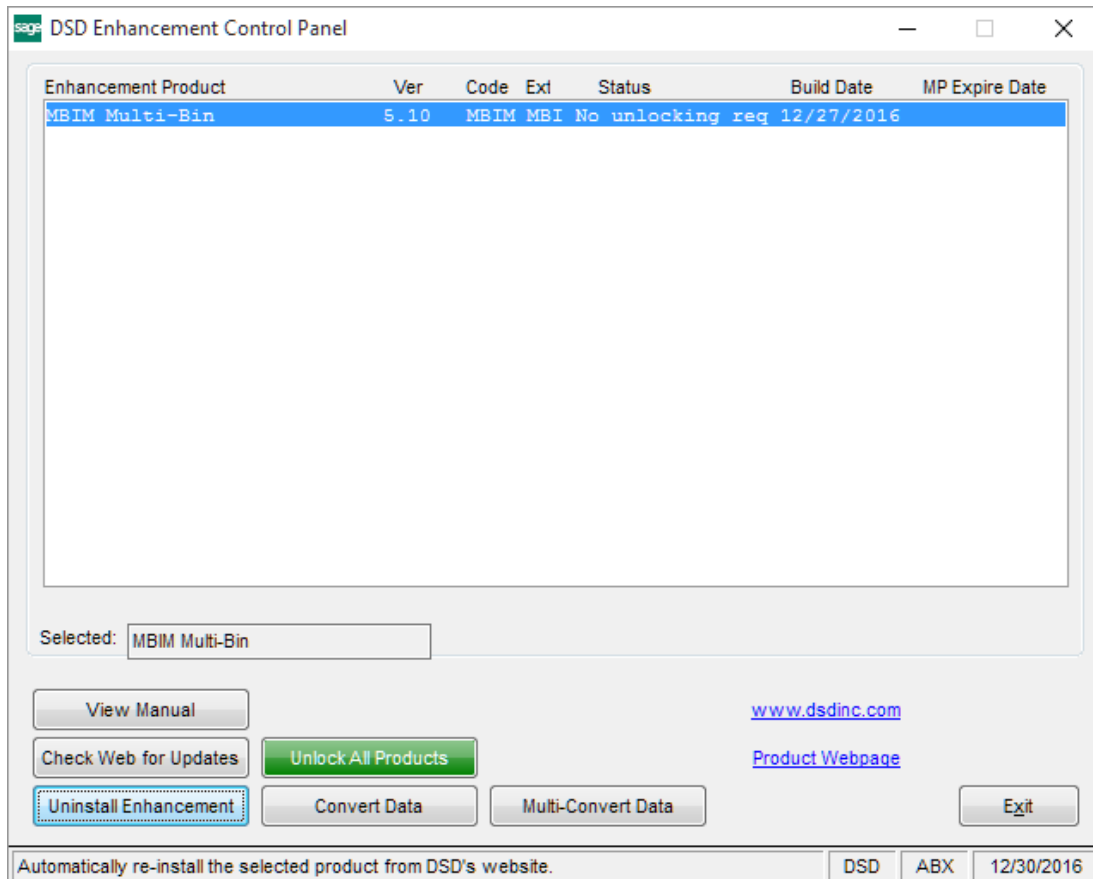
Buttons at the bottom: Accept, Cancel, Delete, and a help icon.

The button enables editing of the MB_BinItem UDFs.

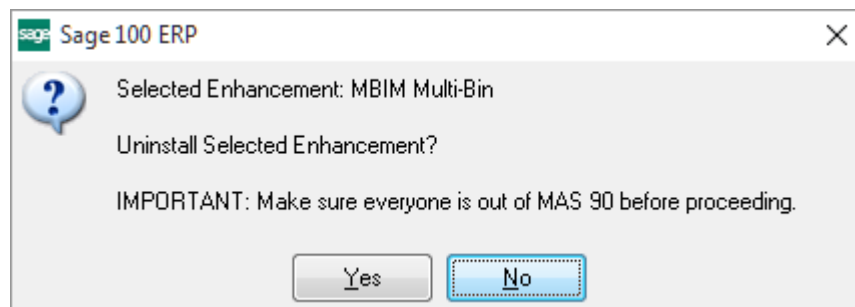


Section E: Uninstall DSD Enhancements

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.

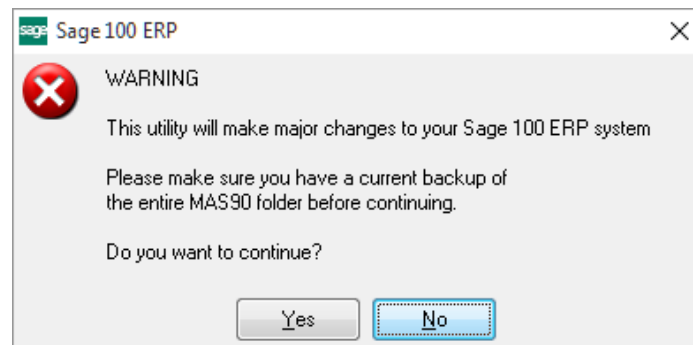


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



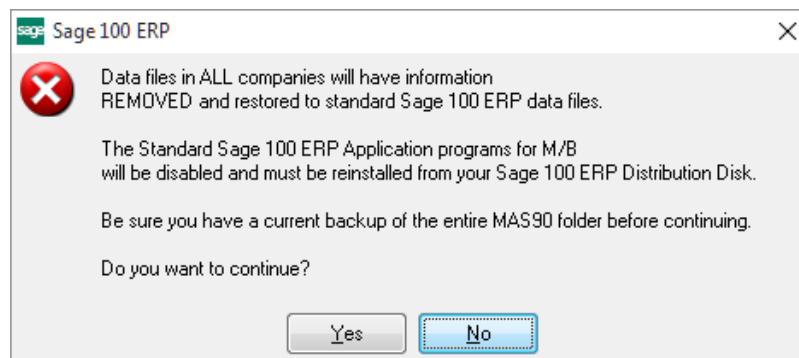
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

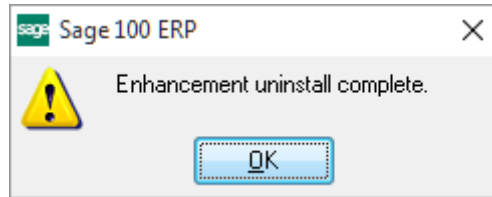
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).