



DSD Business Systems

Sage 100 Enhancements

J022

Enhanced Change Order

JC-1022

Version 5.40



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Enhanced Change Order User's Manual
Version 5.40

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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*

J022 Enhanced Change Order:

<http://www.dsdinc.com/enhancement/enhanced-change-order-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.

Enhanced Change Order Features

This Extended Solution to the Job Cost module modifies Change Order entry in Job Maintenance to support allocation of the change order to multiple Cost Code/Cost Type combinations. If desired a Revised Cost Estimate and Revised Unit Estimate fields.

Additionally a Percent Complete field has been added to the Change Order record for separate tracking from the Job's Contract.

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
J/C	Y	5.40

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.

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
 Serial Number

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

DSD ABX 12/30/2016

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 Conversion Wizard: Step One, Introduction

DSD BUSINESS SYSTEMS

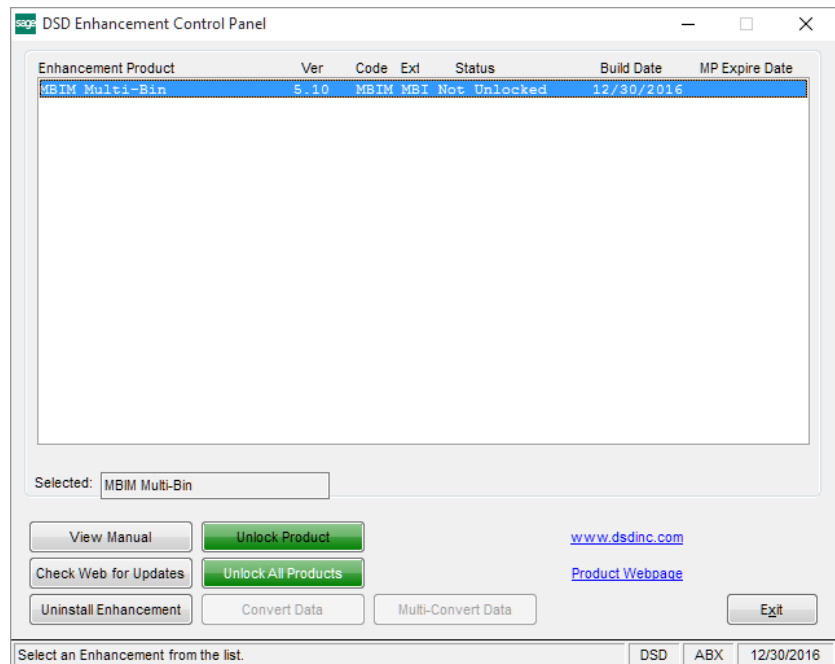
This company's data needs to be converted.
 This program will perform the conversion.

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.



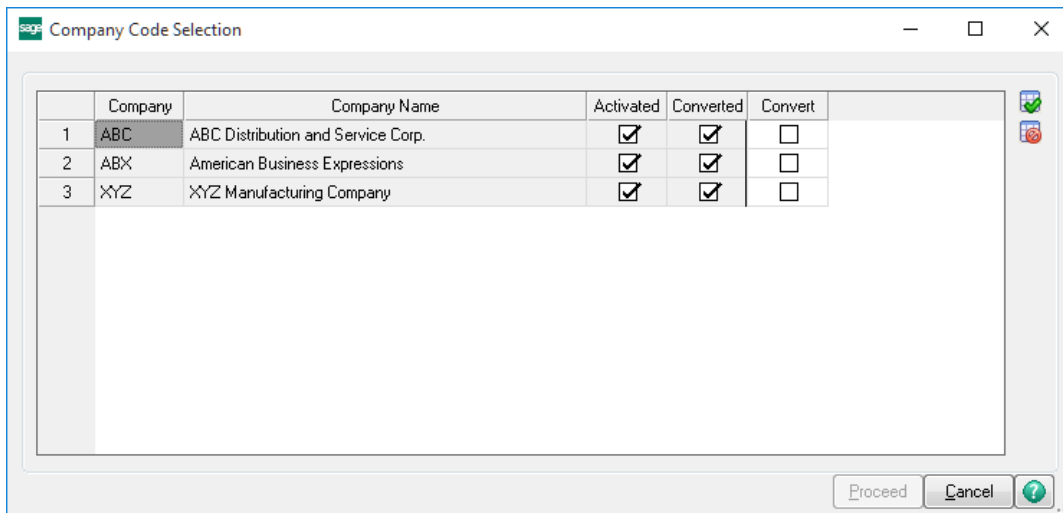
Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

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

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.

The screenshot shows a window titled "JC-1022 Setup Options" with a green "S" icon on the left and a red "X" icon on the right. The main content area is titled "Enhanced Change Order". It contains a checkbox labeled "Enable DSD Extended" which is checked, and a text field to its right displaying "Level 5.40". Below this is a large empty rectangular box. At the bottom right of the main area are "Accept" and "Cancel" buttons. The bottom of the window features a status bar with the text "Check this box to enable Enhanced Change Order" and three small boxes containing "DSD", "EEC", and "11/8/2016".

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

Section D: System Operations

The Job Masterfile Change Orders tab has been modified with a 'More' button. When accessed, you can apply the Change Order to up to 999 combinations of Cost Codes and Cost Types. If the Cost Type is 'Subcontract,' you will have access to a Vendor Number.

The screenshot shows the 'Job Masterfile Maintenance' window with the 'Change Orders' tab selected. The window displays a list of change orders with columns for Date, Seq, Comment, and Contract Amount. The first change order is dated 05/15/2003, sequence 00, with the comment 'Upgrade of standard fixtures to class 2' and a contract amount of 450.00. Below the list, there are buttons for 'Del' and 'More ...', and fields for 'Original Contract' (30,000.00) and 'Revised Contract' (36,450.00). At the bottom, there are navigation buttons and a status bar showing 'EEC' and '10/8/2010'.

Date	Seq	Comment	Contract Amount
05/15/03	00	Upgrade of standard fixtures to class 2	450.00
05/20/03	00	Smoke detector installation	1,000.00
05/31/03	00	Additional upgrades at customer request	5,000.00

The screenshot shows the 'Enhanced Change Orders' window. It includes fields for Date, Seq, Change Order Comment, and Percent Complete. The 'Cost Code' is 100-010-001, 'Cost Type' is Subcontract, and 'Vendor Number' is 01-J&J. The 'Description' is 'Addtl work required', 'Revised Cost Estimate' is 750.00, and 'Revised Unit Estimate' is 5.00. At the bottom, there is a table showing the details of the change order.

Cost Code	Cost Type	Vendor No	Description	Revised Cost	Revised Units
100-010-000	Labor		Addtl trenching required	1,500.00	25.00
100-010-001	Subcontract	01-J&J	Addtl work required	750.00	5.00

The Percent Complete field has been added to the Enhanced Change Orders screen for the change order completion percentage.

If you enter the Revised Estimate and the Revised Unit values for that Cost Code/Cost Type, then value entered here will increment (or decrement) the Job's Cost Code Detail 'Revised Estimate Dollars' and 'Revised Estimate Units' fields.

Period	5	Dollars	% Estimate	Units	% Estimate
Original Estimate		.00		0.0000	
Revised Estimate		1,500.00		25.0000	
Period to Date		.00	.00%	0.0000	.00%
Year to Date		.00	.00%	0.0000	.00%
Job to Date		.00	.00%	0.0000	.00%
Unbilled Cost (WIP)		.00	.00%	0.0000	.00%

Visual Integrator

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

New File:	Field:
JC.CO_DTL	All Fields
JC.TRAN_2	PCT_COMPLETE

When using Visual Integrator, you will need to import records into JC3, *Job Cost Transaction Detail File*, JC_A3, *Job Cost Transaction Detail II*, and JC_C3, *Job Cost Change Order Detail* in that order. Import into JC1, *Job Master File* and JC2, *Job Cost Detail File* to update revised estimate and unit fields. For tables JC3 and JC_C3 you must define the record type for Change Orders in the Records tab.

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

Crystal Reports

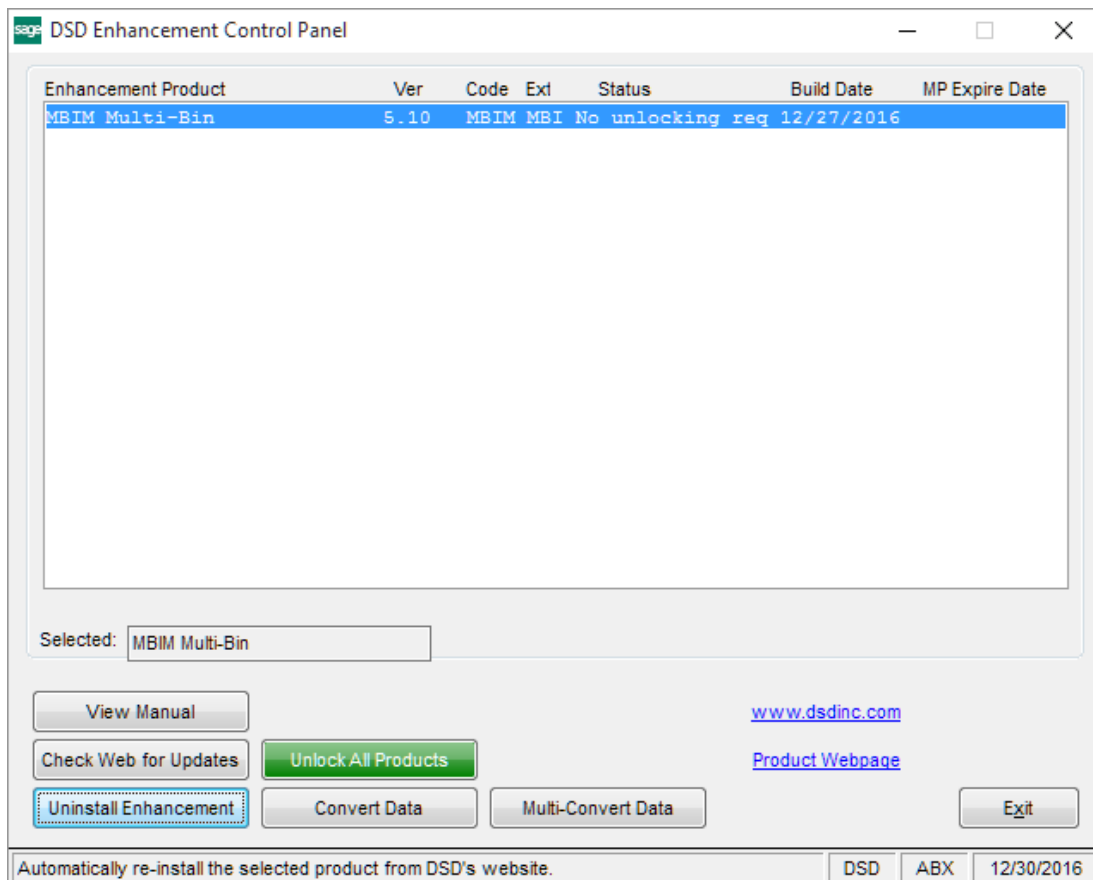
The files listed below have been added or changed in the Crystal Dictionaries by this Extended Solution for Crystal Reports purposes.

File:	Description	Field:
JC_C3_EnhancedChangeOrder		J/C Change Order Detail File All Fields
JC_A3_TransactionDetail2		Percent Complete

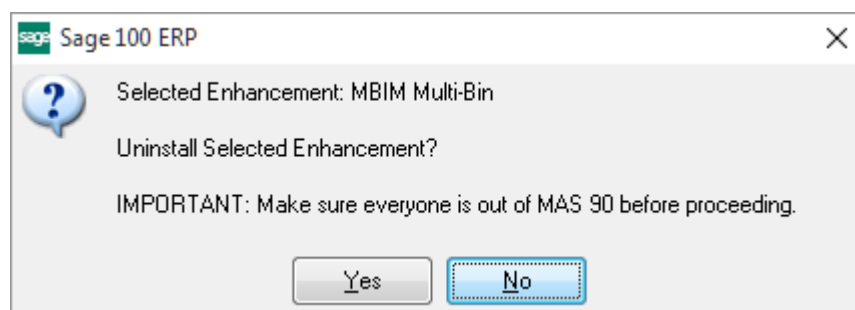
Be aware that the Crystal Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

Section E: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.

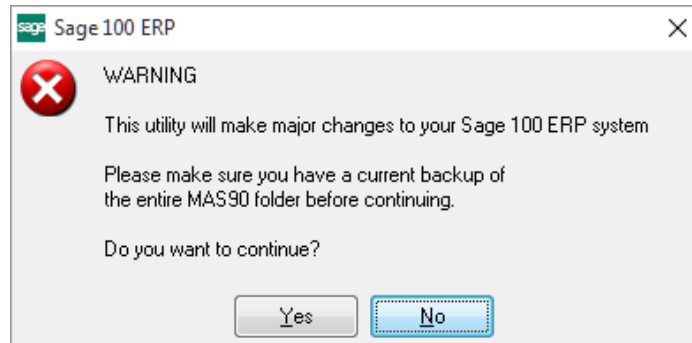


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.

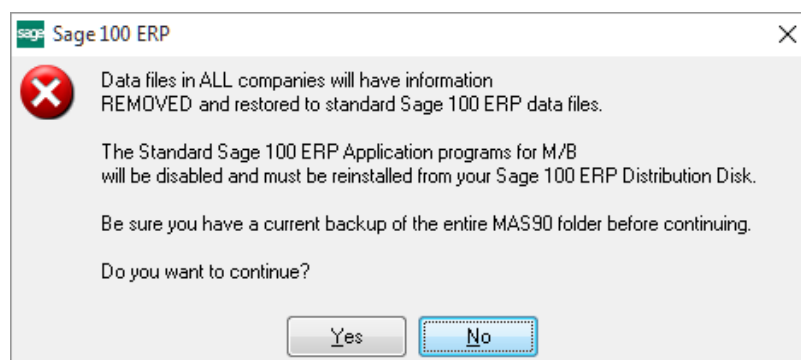
After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

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.

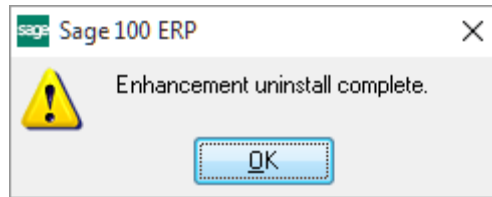
The following message box will appear, displaying the final warning message.



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).