



**DSD**  
BUSINESS SYSTEMS

# **DSD Business Systems**

Sage 100 Enhancements

**J151**

**Customer Equipment Numbers for Jobs**

JC-1151

Version 5.30



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Customer Equipment Numbers for Jobs User's Manual  
Version 5.30

2 May, 2016

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## Table of Contents

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<b>SECTION A: INTRODUCTION</b>	<b>5</b>
WEB RESOURCES .....	5
SUPPORT .....	5
CUSTOMER EQUIPMENT NUMBERS FOR JOBS FEATURES.....	6
<b>SECTION B: GETTING STARTED</b>	<b>7</b>
REQUIRED LEVELS .....	7
INSTALLATION .....	7
DSD ENHANCEMENT CONTROL PANEL .....	9
<b>SECTION C: SETUP</b>	<b>11</b>
<b>SECTION D: SYSTEM OPERATIONS</b>	<b>12</b>
EQUIPMENT SERIAL NUMBER MAINTENANCE BY CUSTOMER .....	12
JOB MAINTENANCE .....	13
JOB TRANSACTION DETAIL REPORT .....	14
ODBC DICTIONARY.....	15
<b>SECTION E: UNINSTALL DSD ENHANCEMENTS</b>	<b>16</b>
<b>LICENSE AGREEMENT</b>	<b>19</b>
<b>FAX TRANSMITTAL FORM</b>	<b>21</b>

## Section A: Introduction

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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*

J151 Customer Equipment Numbers for Jobs:

<http://www.dsdinc.com/enh/pages/J151.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 with Symantec PCAnywhere or by some other means access or duplicate the system.

### ***Customer Equipment Numbers for Jobs Features***

This DSD Extended Solution to the Job Cost module maintains a listing of Serial Numbers that are associated with each Customer. A serial number is then assigned to a job. The job transaction detail report can be selected by a range of serial numbers.

## Section B: Getting Started



- If you reinstall or upgrade one of the Sage100 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	5.30
A/R	Y	5.30

### 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 Sage100:** 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 registration, the Data Conversion window will appear. Follow on-screen instructions to complete data conversion. You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.



## DSD Enhancement Control Panel

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

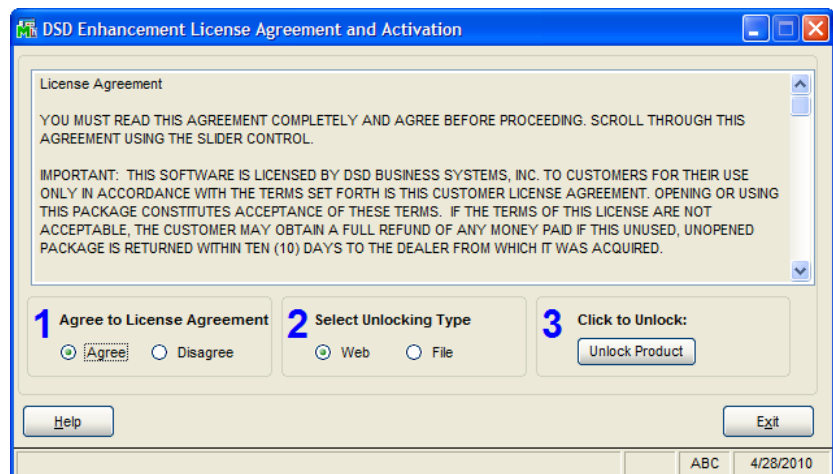
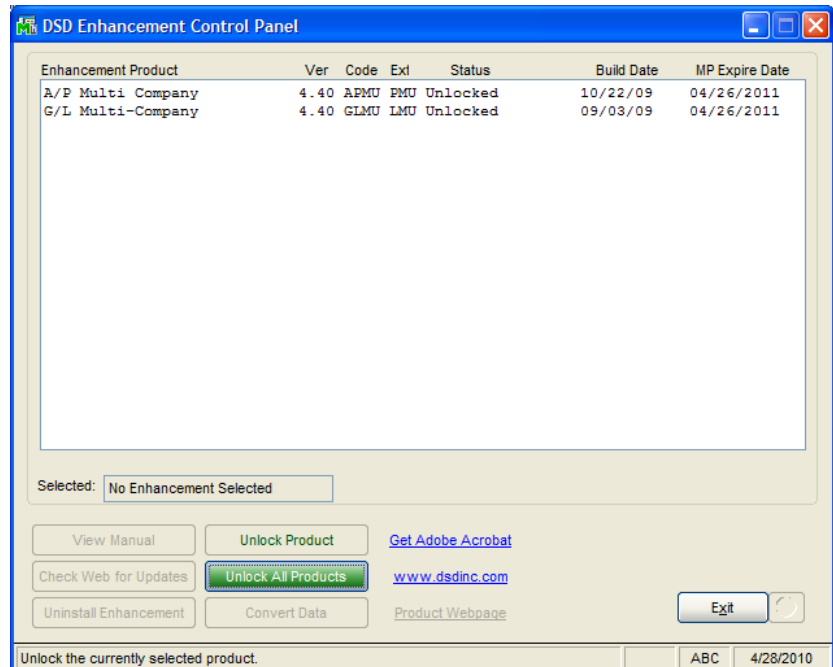
The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired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

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



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

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

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

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

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

## Section C: Setup

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

The screenshot shows a software setup window titled "JC-1151 Setup Options". The main heading is "JC-1151 Customer Equipment Num". It features a checkbox labeled "Enable DSD Extended" which is checked, and a text label "Level 5.30". Below this is a section for "J/C Header UDF for Serial Number" containing a text box with "SERIAL" and a search icon. A list below the text box shows "Serial". At the bottom right are "Accept" and "Cancel" buttons. At the bottom left is a checkbox "Check this box to enable JC-1151 Customer Equipment Num". At the bottom right are three buttons: "DSD", "XYZ", and "4/28/2016".

Answer the following question:

**J/C Header UDF for Serial Number:** Specify the multi-line, string, 25 characters maximum UDF which holds the serial number. **You do not need to add this UDF on the Job Maintenance screen via Customizer.**

## Section D: System Operations

### Equipment Serial Number Maintenance by Customer

Customer Masterfile Maintenance has been modified with a new 'Serial No' button to allow the user to maintain a list of equipment serial numbers for the customer. The serial number field is alphanumeric and can be up to 25 characters in length.

**Customer Maintenance (EEC) 11/28/2011**

Customer No. 01-SADDLE  
 Name Saddleback Community Hospital

1. Main | 2. Additional | 3. Statistics | 4. Summary | 5. History | 6. Invoices | 7. Transactions | 8. S/O's

Address 1905 E. Olive Heights Rd.  
 ZIP Code 92668  
 City Orange State CA  
 Country  
 Residential Addr  
 Salesperson 0200 Ann Jacobson  
 Telephone (714) 633-2571 Ext 545  
 Fax

Terms Code 01 Net 30  
 Primary Contact MIKE SHAPI Mike Shapiro  
 Ship Code  
 Tax Schedule CA California  
 Exemptions...  
 Credit Hold  
 Credit Limit .00

E-mail Address  
 URL Address

Serial No

Accept Cancel Delete

**Serial Numbers**

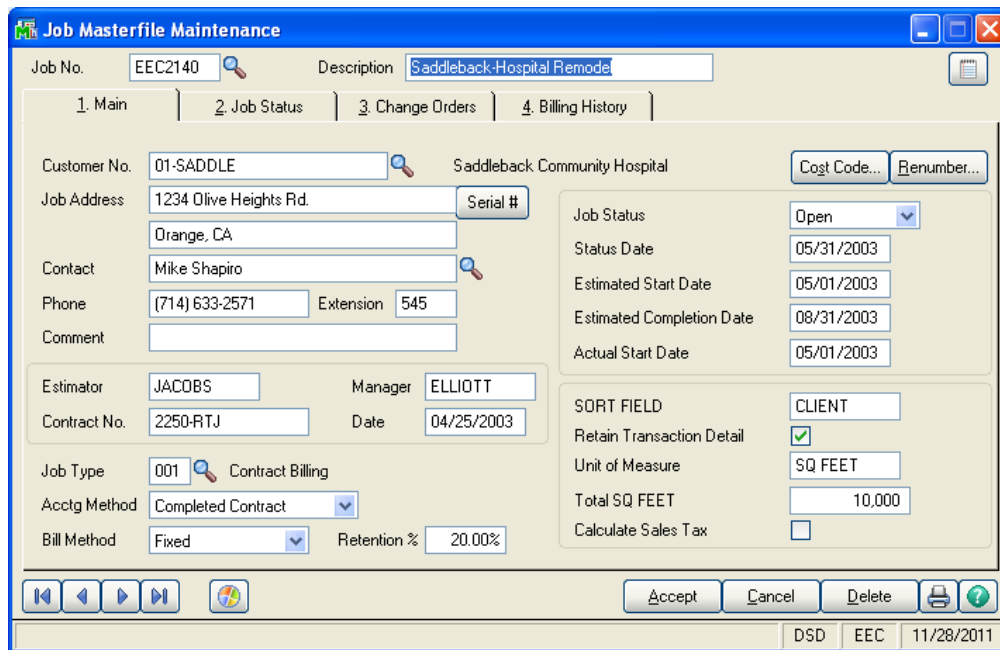
1  
 1234  
 1235  
 4550  
 4551  
 4552  
 A654  
 A655

Add  
 Delete

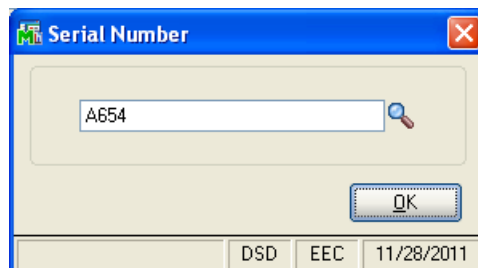
Accept Cancel

**Job Maintenance**

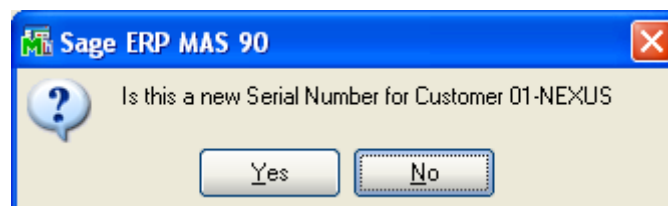
Job Masterfile Maintenance has been modified with a new button: 'Serial #'.



When clicked, it will prompt the user for a serial number for this Job.



The user can select from the list of serial numbers set up for this customer or can enter a new one. If a not-on-file serial number is entered, you will be prompted to add it to the Customer Serial Number file. The serial number will be stored in the J/C Header UDF specified in setup. It is not required that a user define a serial number to a job.



### Job Transaction Detail Report

The Job Transaction Detail Report has been modified to print the Serial Number. There is also an option to select a range of Serial Numbers via a new button 'Serial #'. When clicked, the user will be prompted for a range of serial numbers. An ALE into on file Serial Numbers will be available only when one customer is specified in the Customer Number range.

The screenshot shows the 'Job Transaction Detail Report' dialog box. It contains several sections for configuring the report:

- Sort Options:** A dropdown menu set to 'Job Number'.
- Cost Codes to Print:** A checkbox labeled 'All' is checked, followed by a text input field.
- Source Journal to Print:** A checkbox labeled 'All' is checked, followed by four empty text input fields.
- Data to Print:** A dropdown menu set to 'Estimate Information'.
- Job Status to Print:** A checkbox labeled 'All' is checked. Below it are checkboxes for 'Bid', 'Late Charge', 'Complete', 'Open', 'Hold', and 'Closed', all of which are checked.
- Cost Type to Print:** A checkbox labeled 'All' is checked. Below it is a text input field containing 'L,M,S,O,B,E' and a button labeled 'Select Cost Type...'.
- Print Total Labor Units:** An unchecked checkbox.
- Print Options:** Checkboxes for 'Print Transaction Detail', 'Page Break by Job', and 'Print Jobs with No Activity', all of which are checked.
- Selection:** A section with columns for 'All', 'Starting', and 'Ending'. It includes checkboxes and text input fields for 'Job Number', 'Estimator', 'Manager', 'Job Type', 'SORT FIELD', 'Transaction Date', and 'Customer Number'. The 'Job Number' checkbox is checked. The 'Transaction Date' checkbox is checked. The 'Ending' field for 'Job Number' contains '12/31/2999'.
- Serial # Button:** A button labeled 'Serial #' is located near the 'Ending' field.
- Printer Selection:** A text input field containing '\\dsd1\\HP P2055 Series PCL6'.
- Buttons:** 'Print', 'Preview', and 'Printer Setup...' buttons.
- Status Bar:** Displays 'DSD', 'EEC', and '11/28/2011'.

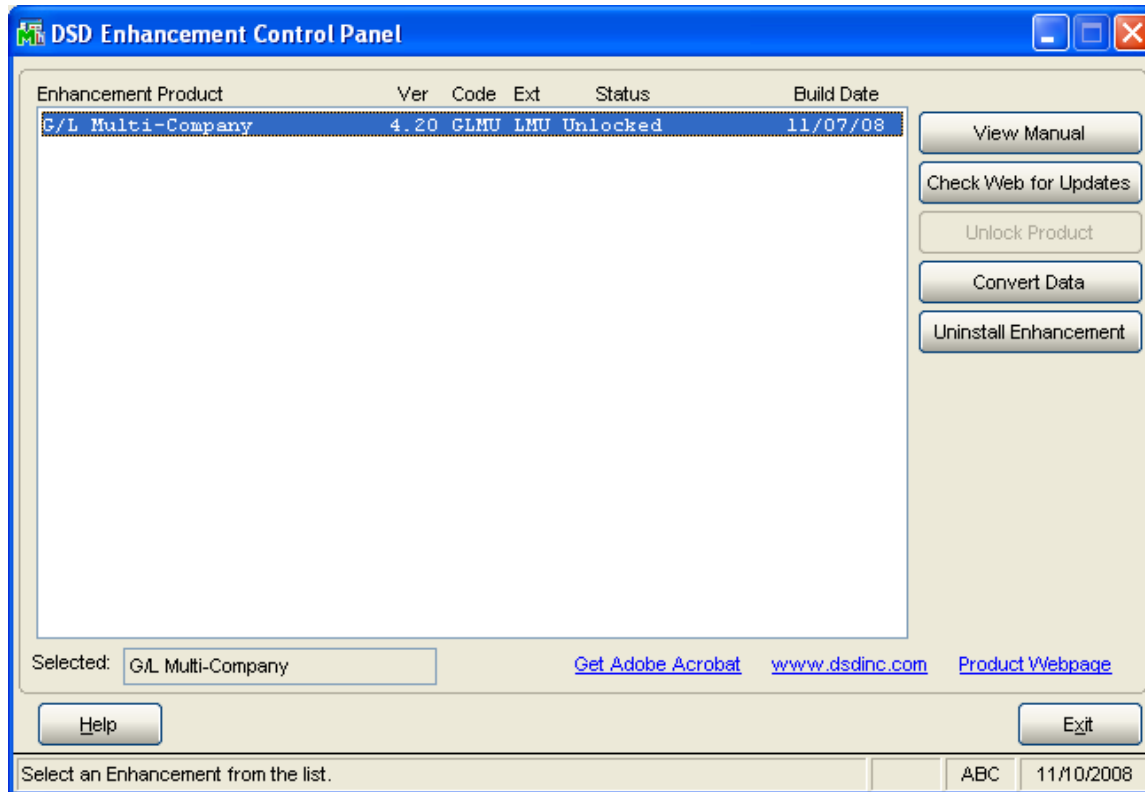
The screenshot shows the 'Serial Number Selection' dialog box. It contains a section for selecting a range of serial numbers:

- Selection:** A section with columns for 'All', 'Starting', and 'Ending'. It includes a checkbox labeled 'Serial Number' which is checked, followed by a text input field. The 'Ending' field contains '22222222222222222222222222222222'.
- OK Button:** A button labeled 'OK' is located at the bottom right.
- Status Bar:** Displays 'DSD', 'EEC', and '11/28/2011'.

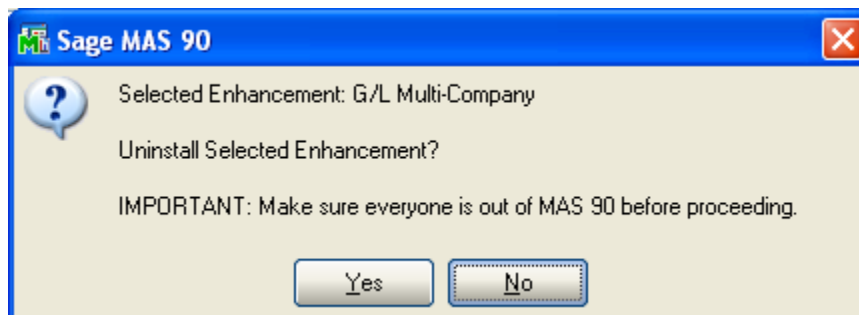


## Section E: Uninstall DSD Enhancements

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.



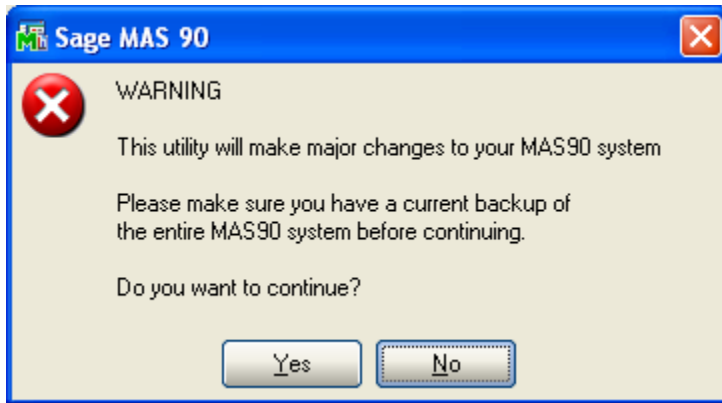
When accessing the **DSD Utility Suite**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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



The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.

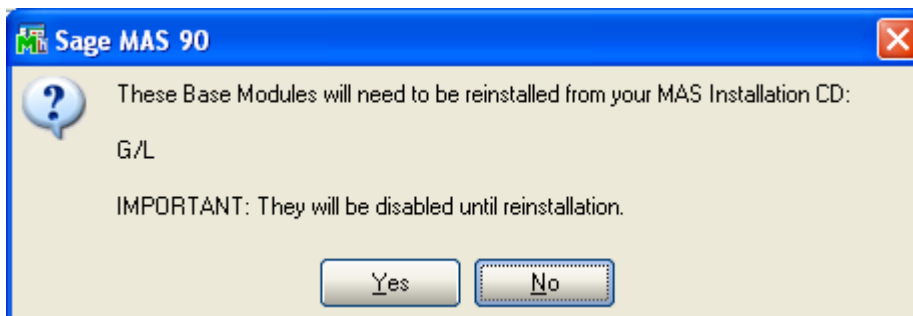


Select **No** to exit the Uninstall Process.

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 Sage 100 Service Packs / Updates, if applicable.

The following message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.



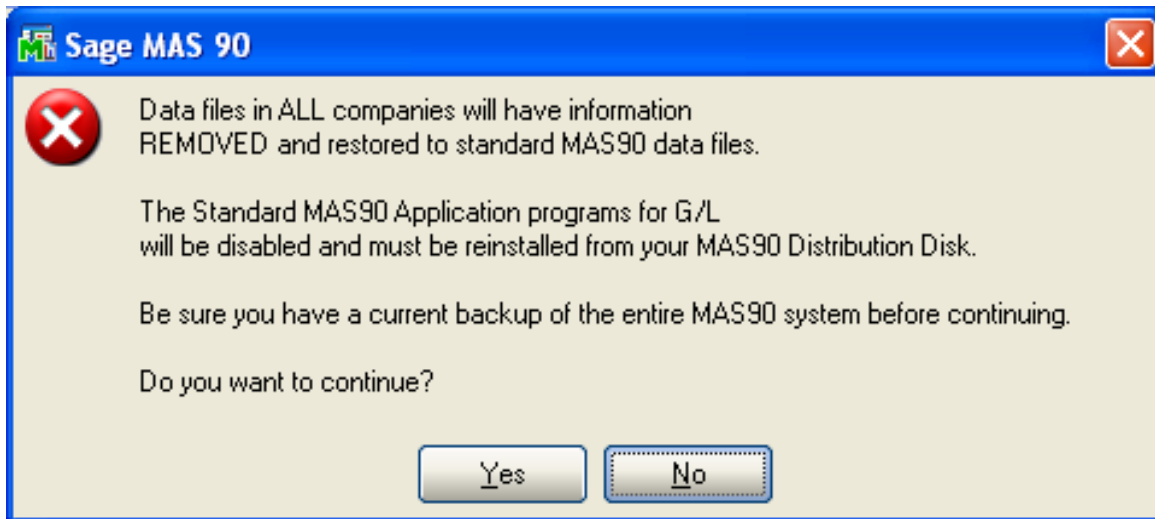
Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process.

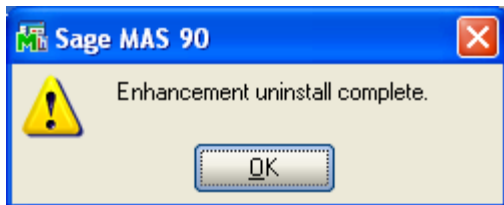
The following message box will appear, displaying the final warning message.

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).

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## Fax Transmittal Form

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To:	<i>DSD Business Systems Customer Service</i>		Fax:	<i>858/550-4900</i>
From:	Name:		Phone:	
	Company:		Fax:	
Date:	/ /	# Pgs Including this Page:		
Subject:	Check One: <input type="checkbox"/> Product Problem <input type="checkbox"/> Suggestions			
Product:	<i>J151 Customer Equipment Numbers for Jobs</i>		Version:	<i>5.30</i>

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