



# **DSD Business Systems**

**Sage 100 Enhancements**

**J151**

**Customer Equipment Numbers for Jobs**

**JC-1151**

**Version 7.00**



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Customer Equipment Numbers for Jobs User's Manual  
Version 7.00

31 January, 2022

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## 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*

EEEE Customer Equipment Numbers for Jobs:

<http://www.dsdinc.com/enh/pages/EEEE.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.

### ***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 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	7.00
A/R	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 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:

Help Exit

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.

Cancel Next

### 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.

JC-1151 Setup Options

JC-1151 Customer Equipment Num

Enable DSD Extended Solution ☒ Level 7.00

J/C Header UDF for Serial Number SERIALNO SerialNo

Accept Cancel

DSD EEC 1/20/2022

Answer the following question:

**J/C Job Masterfile 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

Customer Masterfile Maintenance has been modified to add a 'Serial Number' option to the standard 'More ...' 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.

The screenshot shows the 'Customer Maintenance (EEC) 9/6/2019' window. At the top, there's a title bar with a green 'S' icon and standard window controls. Below the title bar, the 'Customer No.' is '01-A&H' and the 'Name' is 'Adams & Hanks'. There are buttons for 'Copy From...', 'Renumber...', and a dropdown menu for 'Serial...'. A tabbed interface at the top includes '1. Main' (selected), '2. Additional', '3. Statistics', '4. Summary', '5. History', '6. Invoices', '7. Transactions', and '8. S/Os'. The main area is divided into two columns. The left column contains fields for 'Address' (444 Centerpoint Drive, Floor 12), 'ZIP Code' (92626), 'City' (Costa Mesa), 'State' (CA), 'Country', 'Residential' (checkbox), 'Salesperson' (0100, Michael Ericson), 'Telephone' ((714) 540-1414), 'Ext' (1224), 'Fax', 'E-mail Address', and 'URL Address'. The right column contains 'Terms Code' (01, Net 30), 'Primary Contact' (JILL THOMP, Jill Thompson), 'Ship Code', 'Tax Schedule' (CA, California), 'Exemptions...', 'Credit Hold' (checkbox), and 'Credit Limit' (.00). At the bottom, there are 'Accept', 'Cancel', and 'Delete' buttons, along with a printer icon and a help icon.

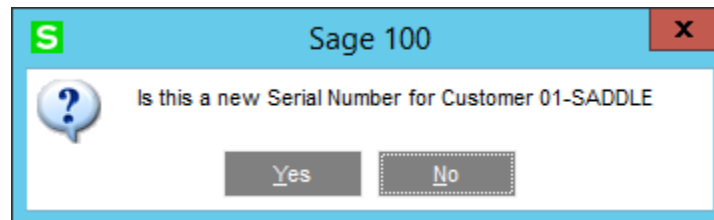
The screenshot shows the 'Serial Numbers' window. It has a title bar with a green 'S' icon and a close button. The main area contains a list of serial numbers: 5678 (highlighted), 1234, and 5678. To the right of the list are 'Add' and 'Delete' buttons. At the bottom, there are 'Accept' and 'Cancel' buttons.

**Job Maintenance**

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

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 with an additional Selection of 'Serial Number'

**S** Job Transaction Detail Report (EEC) 7/25/2018

Report Setting: STANDARD Ref Comment Save

Description: Job Transaction Detail Report

Setting Options

Type: Public Print Report Settings ☐ Number of Copies: 1

Default Report: ☒ Three Hole Punch ☐ Collated ☒

Sort Report By: Job Number

Job Statuses to Print

All Statuses ☒ Bid ☒ Complete ☒ Hold ☒ Late Charge ☒ Open ☒ Closed ☒

Cost Types/Codes to Print

All Cost Types ☒ B,E,L,M,O,S Select Cost Type...

All Cost Codes ☒

Source Modules to Print

All ☒ ☐ ☐ ☐ ☐

Options

Print Transaction Detail ☒ Print Total Labor Units ☐ Additional Information to Print: Estimate Detail

Print Jobs with No Activity ☒ Page Break by Job ☒

Selections

Select Field	Operand	Value
Job Type	All	
Transaction Date	All	
Serial Number	All	

Brother HL-2170W series Printer Keep Window Open After Print ☐ Preview ☐ Print Preview Setup

The report will now include the Serial Number associated with the Job as the last line of the Job Header information.

**Job Transaction Detail Report**  
Sorted by Job Number

**Edwardson Electric Company (EEC)**

Job No: EEC2140    Saddleback-Hospital Remodel    Customer No: 01-SADDLE Saddleback Community Hospital

Job Type: 001 Contract Billing    Bill Method: F FIXED    Estimator: JACOBS    Start Date: 5/1/2020  
 Job Status: C Complete    Status Date: 5/31/2020    Manager: ELLIOTT    Compl Date: 8/31/2020  
 Contract No: 2250-RTJ    Contr Date: 4/25/2020    Rev.Contract: 36,450.00    SQ FEET: 10,000.00  
 %Complete: 60.00%    Reported Date: 5/15/2020    Rev.Estimate: 33,515.00    Calc % Cmp: 55.13%  
 Serial Number: 123

Cost Code /Type	Trans. Date	SRC	Reference/Posting Remarks	Billed?	Unit Cost	Units	Dollars	Revised Estimate	%Estimate
100-010-000			Underground Work - Digging						
E		Equipment		U/M: HOUR			0.00	0.00	

Current Page No.: 1    Total Page No.: 5+    Zoom Factor: 100%

### ODBC Dictionary

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

#### File:

AR\_CustomerSerial\_001.M4T

JC\_JobTransactionDetailWrk.M4T

#### Fields:

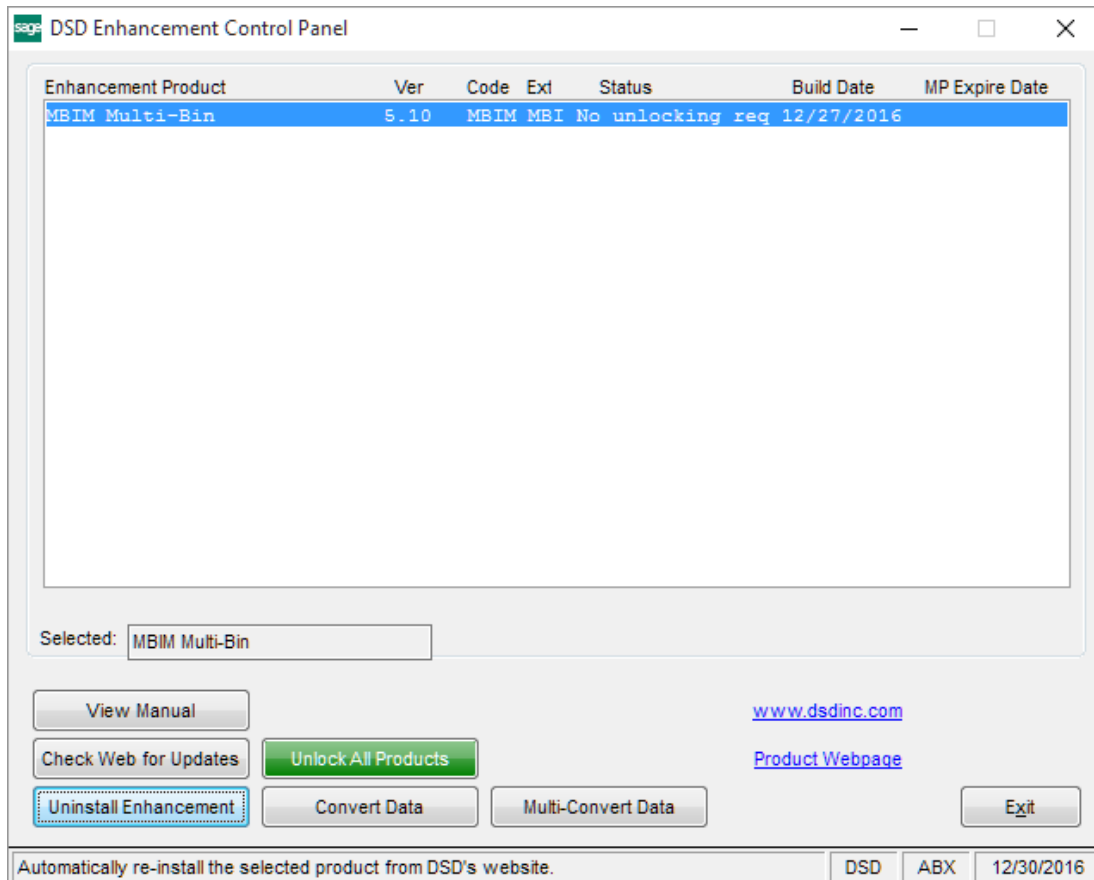
All Fields

SerialNo\_001

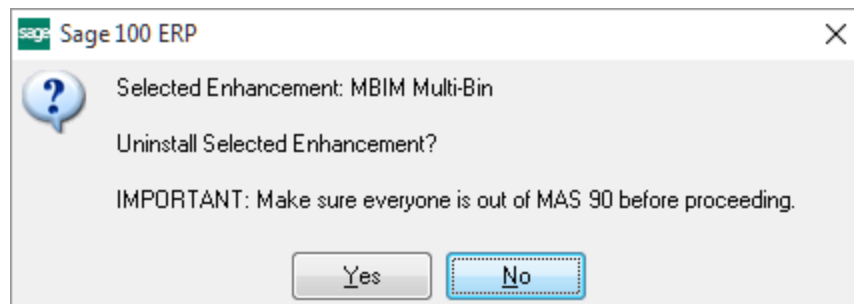
Be aware that the Crystal Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

## 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.

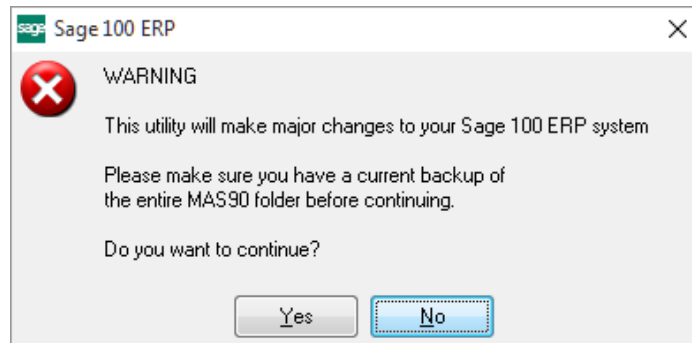


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.

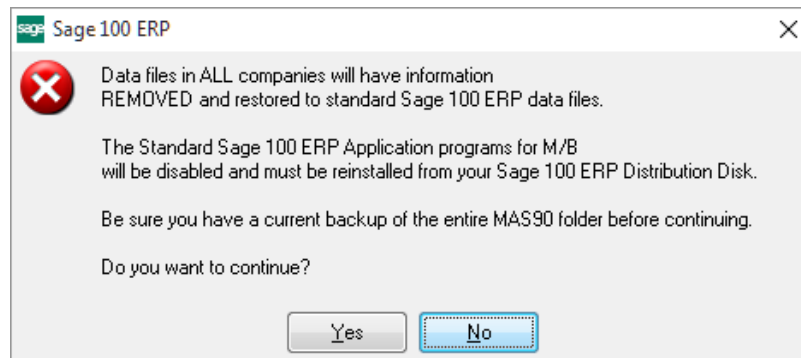
**After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.**

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.

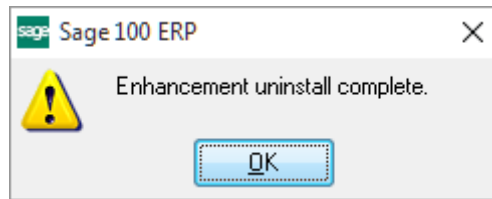


Select **No** to exit the Uninstall Process.

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).