



DSD Business Systems

Sage 100 Enhancements

L033

Enhanced Faxing for Paperless Office

LM-1033

Version 7.20



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Enhanced Faxing for Paperless Office User's Manual
Version 7.20

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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*

L033 Enhanced Faxing for Paperless Office:

<http://www.dsdinc.com/enhancement/enhanced-faxing-for-paperless-office-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 Faxing for Paperless Office Features

This Extended Solution adds internet faxing capabilities to Paperless Office by converting faxes to emails for the following providers:

- eFax
- MaxEmail
- Protus

It is designed to be used in conjunction with Paperless forms and Extended Solution AP-1095, *Paperless Office: A/P Checks and Direct Deposit Stubs*.

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
L/M	Y	7.20

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.

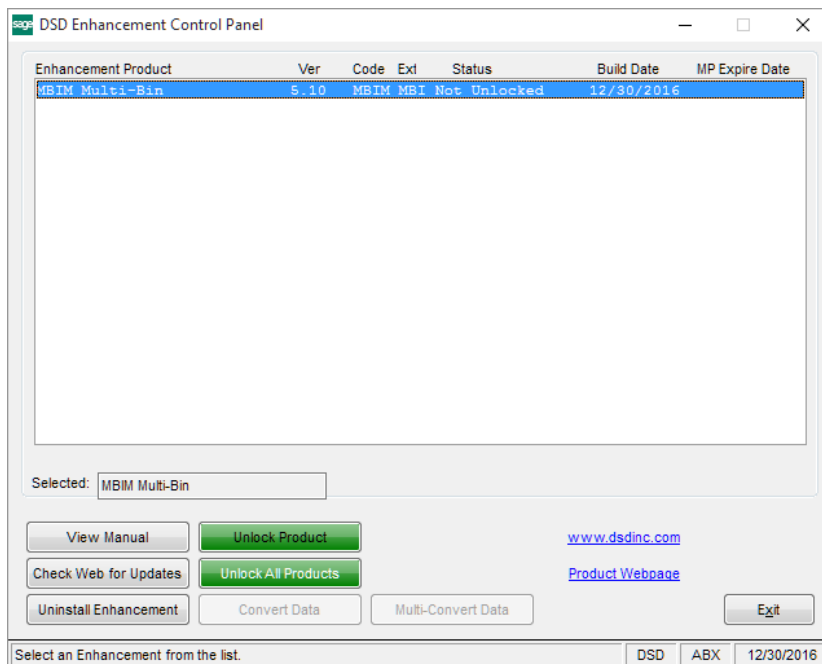
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct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

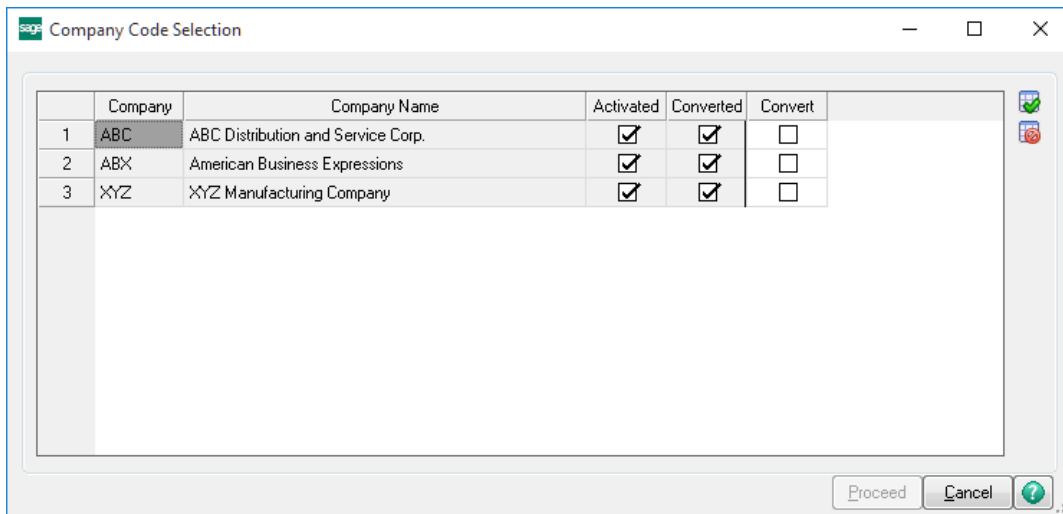
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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

Once the software is installed, you will need to access the Library Master Setup menu item and select DSD Extended Solutions Setup. Check the 'Enable DSD Extended Solution' box to activate this Extended Solution.

The screenshot shows a window titled "LM-1033 Setup Options" with a sub-header "LM-1033 Enhanced Faxing". At the top, there is a checkbox for "Enable DSD Extended Solution" which is checked, and a "Level 7.20" label. Below this are two tabs: "Faxing Setup" (selected) and "Test Faxing". Under the "Faxing Setup" tab, there is a "Faxing Service" dropdown menu with the text "Choose a Fax Service". Below the dropdown are three text input fields: "From' E-mail Address", "Password", and "Fax Service Domain". There are two checkboxes: "Include Cover Page" and "Use 'Fine' Transmission Resolution", both of which are currently unchecked. At the bottom left of the form area is a "Local Area Code" text input field. At the bottom right of the window are "Accept" and "Cancel" buttons. A status bar at the very bottom of the window shows "DSD", "ABC", and "5/10/2023".

Answer the following prompts under the 'Faxing Setup' tab:

Faxing Service: Select the service you will be using to send faxes:

- eFax
- MaxEmail
- Protush
- Generic FAX Service

Generic Fax Service has been added as an option in addition to the faxing services currently offered. We have made this option available for users that can configure it to work with their chosen fax service. We provide no warranty or support of this option.

'From' E-Mail Address: Enter the e-mail address authorized to send faxes from this fax service.

Password: Enter the password for this service, if one is required.

Include a Cover Page: Check this box to include cover page if your fax service supports cover page. If you use Protus, check this box to include the fax message on the cover page that you set up in your account preference.

Fax Service Domain: Enter the domain name for the fax service selected above.

Use 'Fine' Transmission Resolution: Check this box to use 'fine' resolution. Note that not all faxing services support this option.

Local Area Code: Enter your local area code.

Answer the following prompts under the 'Test Faxing' tab:

Fax Number: Enter the fax number to which you want to send a test fax. Format the number as instructed by your fax service (usually beginning with a '1' and followed by the area code and phone number).

Subject Line For Testing: Enter the text for the subject line on the test fax.

Click the 'Send Test Fax' button. The text box to the right of the button will tell you whether or not the fax was sent to the selected faxing service successfully. Obviously, you should also check to see if the fax was received at the specified fax number.

Company Maintenance

Your Company Code must be set up to send emails on the E-mail tab. The Fax tab options are irrelevant to this Extended Solution.

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

Note: Do not print to eFax printer instead of using Paperless Office. It is not compatible with Crystal Reports for v. 4.40 and up.

Section D: System Operations

Paperless Forms Printing

Paperless form faxes will be converted to emails to the faxing service selected. 'From Fax Number' and 'From Name' are not used.

Paperless Office Selection

PDF Options
 Store PDF

E-mail Options
 E-mail Use E-mail Message Test E-mail...
 From E-mail Address
 Subject Line
 To E-mail Addresses

Fax Options
 Fax Use Fax Message Test Fax...
 From Fax Number
 From Name
 Subject Line
 To Fax Numbers

Fax Number	Recipient Name
<input type="text"/>	<input type="text"/>

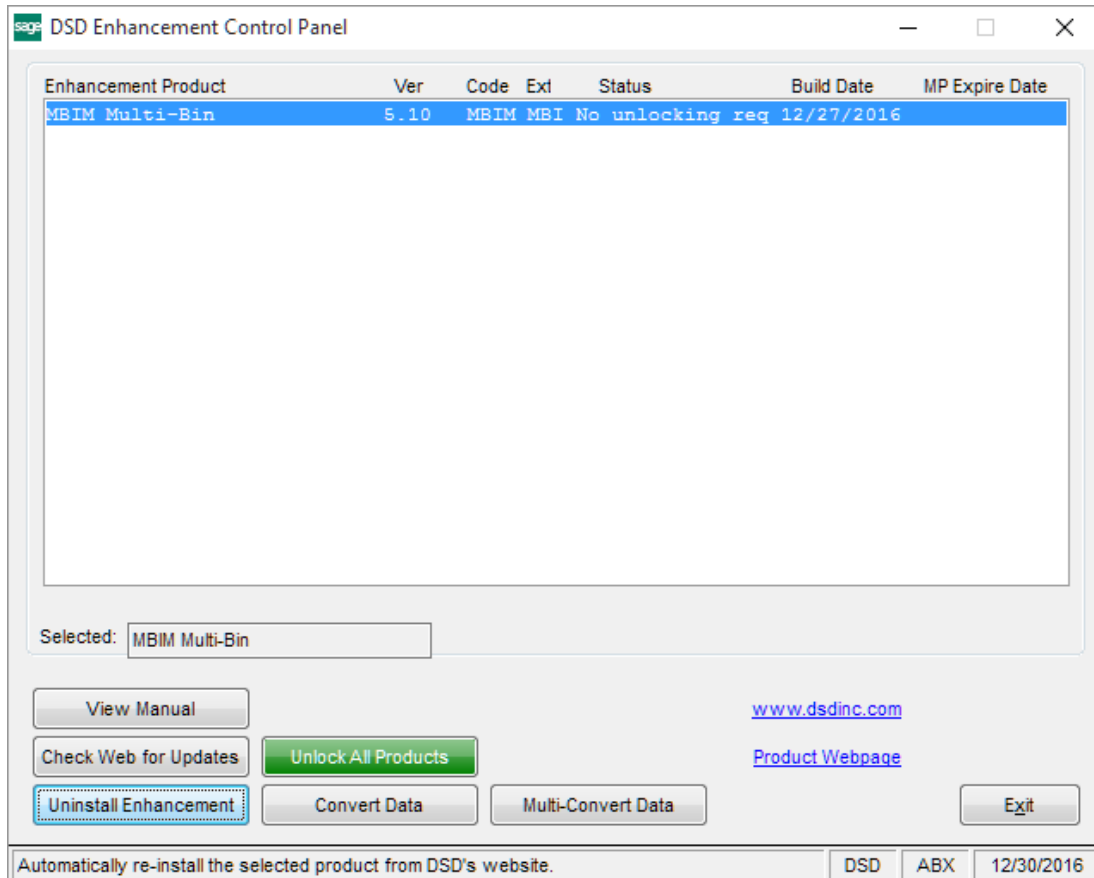
Proceed Cancel ?

If Setup option 'Include Cover Page' is checked and your faxing service supports cover page, the fax message set up in Electronic Delivery Message Maintenance (when 'Use Fax Message' is checked) or the Subject Line (when 'Use Fax Message' is unchecked) will be included on the cover page.

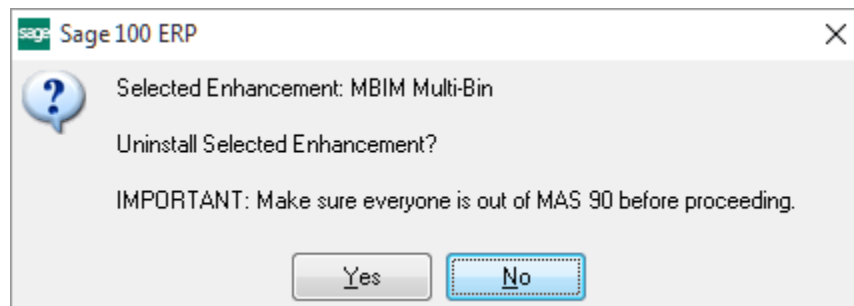
When importing fax numbers into Customer Maintenance, the format must be (###)###-####, otherwise your Fax Service may reject the request for transmittal.

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.

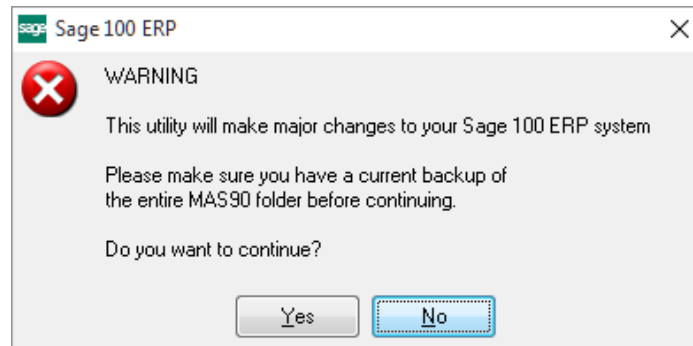


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



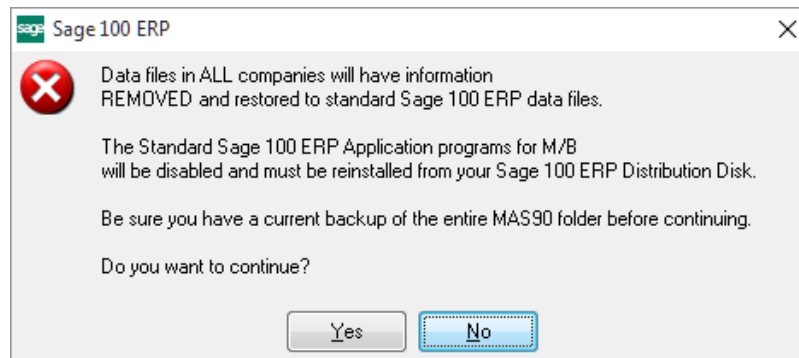
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

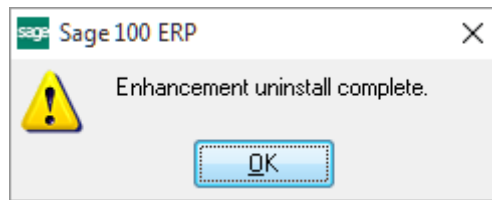
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).