



DSD Business Systems

Sage 100 Enhancements

LMAD

Advanced Data Editor

Version 7.40



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Advanced Data Editor User's Manual
Version 7.40

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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*

LMAD Advanced Data Editor:

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.

Advanced Data Editor Features

A new utility has been added to the Library Master menu. This utility will facilitate data record editing by making available for modifications all data column elements for any Business Framework table in a user friendly, grid entry format.

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	7.40

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.

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 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.

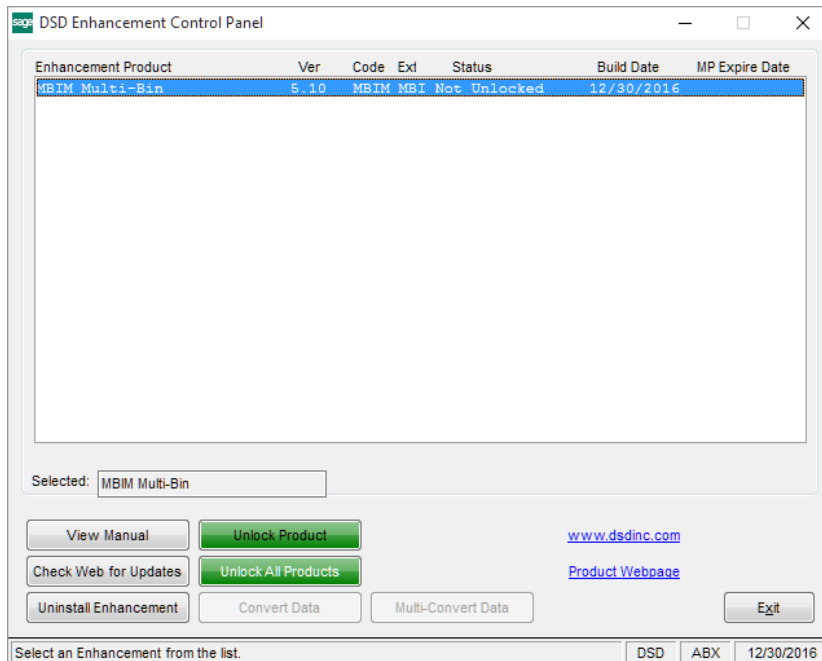
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct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

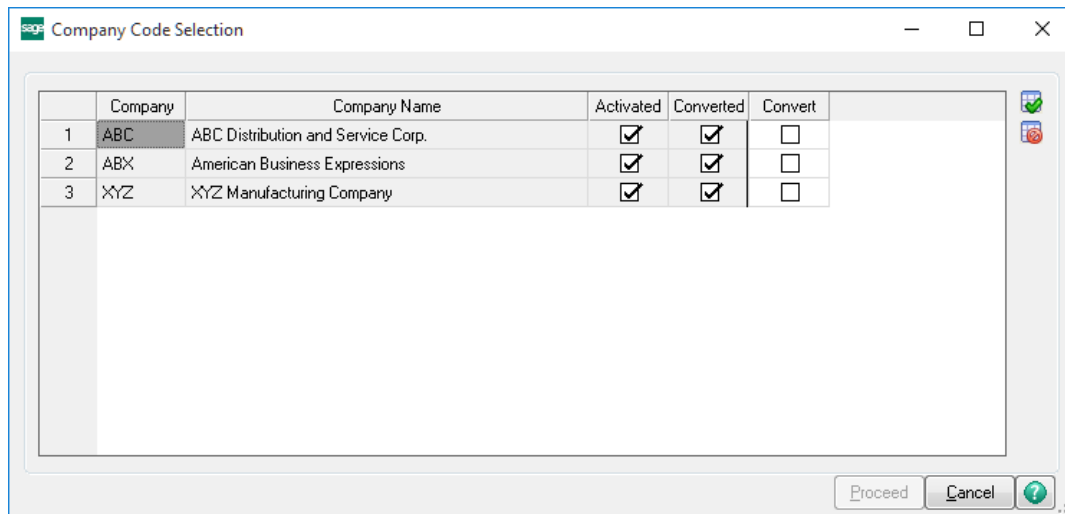
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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.

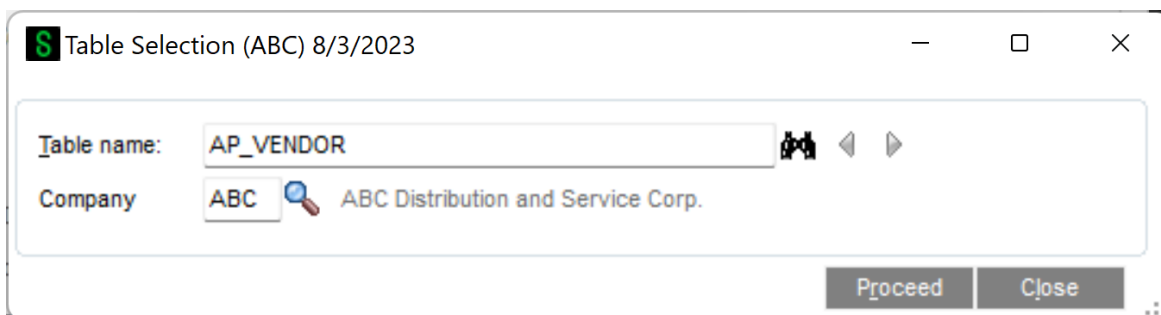
Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system. (for more information see [Uninstall DSD Enhancements](#))

Section C: System Operations

Product Use

The Advanced Data Editor task is accessible from the Library Master / Utilities menu.

A Table Selection dialog allows the selection of a Table name and Company Code for editing.



Once the Table name and Company code have been selected, the “Proceed” button will become enabled allowing the presentation of all data records within the table in a formatted grid.

A grid record loading threshold has been assigned to one hundred records.

A button in the lower left margin of the screen allows the load of additional records in increments of one hundred.

	AP Division Number	Vendor Number	Vendor Name	Address Line 1	Address Line 2	Address Line 3	C
11	01	STEV	Stevens Supply	P.O. Box 40-a			Santa Clara
12	01	SWAM	Southwest Amalgamated Distribution, Inc.	56321 Marguerite Pkwy			Mission Viejo
13	01	UNITED	United Computers	4498 Ruby Lane			Dallas
14	01	UPS	United Post Office Service	P.O. Box 8890			Santa Ana
15	02	ARTRAV	Airport Service Travel	6666 Campus Drive			Newport Beach
16	02	AMERLR	American Alarm Service	3333 North Grand	Suite 331		Indianapolis
17	02	AMEX	American Express Company	P.O. Box 666654			Dallas
18	02	ARROW	Arrowsmith Drinking Water	P.O. Box 55612			Phoenix
19	02	AVID	Avid Label	98 West 25th			Pasadena
20	02	BROWN	Brown & Johnson	23321 Ventura Avenue			Woodland Hills
21	02	CONSULT	Tax Consultants, Inc.	12205 Emerald Street			Garden Grove
22	02	CORPEIS	Corporate Enterprise Infrastructure Solutions	491 Commercentre Drive			Lake Forest
23	02	DIVARCH	Diversified Architectural Concrete Systems	127696 Preble Drive			Tustin
24	02	EMPLOY	Employment Development Dept	P.O. Box 31216			Los Angeles
25	02	EQUAL	State Board Of Equalization	P.O. Box 8871			Sacramento
26	02	IRS	Internal Revenue Service	776 Sacramento Drive			Sacramento
27	02	LEARNER	Roger W. Learner	7721 24th Street	Suite 125		Corona Del Mar
28	02	MCS	Mcs Long Lines	Commercial Service Center			Phoenix
29	02	MUTLIF	Mutual Life Company	P.O. Box 66541			Orange
30	02	OFFICE	OfficeMax	85 Technology			Irvine
31	02	PACTEL	Pacific Telephone	3214 East 14th Street			Santa Ana
32	02	SCR	South Coast Rep Theater	42165 Avenue Of the Arts			Newport Beach
33	02	TELCOMM	Tel-comm Communications	4356 Grand Avenue			Oakland
34	02	TOUCHWA	Touche Waterhouse & Company	Newport Center Drive			Newport Beach

The grid will initially load in “View Only” mode.

A “Fix” button, located in the screen’s right margin, allows record editing.

- Once the fix button has been pressed the following additional buttons will be enabled: Delete Row, Insert Row, Reset Row
- **Note:** A Role Security event exists to allow the assignment of editing permissions by User Role. The Fix button will be hidden if the user doesn't have the security event enabled.

An "Excel" button, located on the screen's right margin, allows the grid records to be exported to excel.

A "Navigate Column" check box option exists on the bottom of the screen.

- When this checkbox is enabled, the grid column receiving focus will remain active allowing "down direction" editing when pressing "enter".

Note: Fields(columns) that comprise the key definition for the selected table will not be editable, nor will fields that are encrypted.

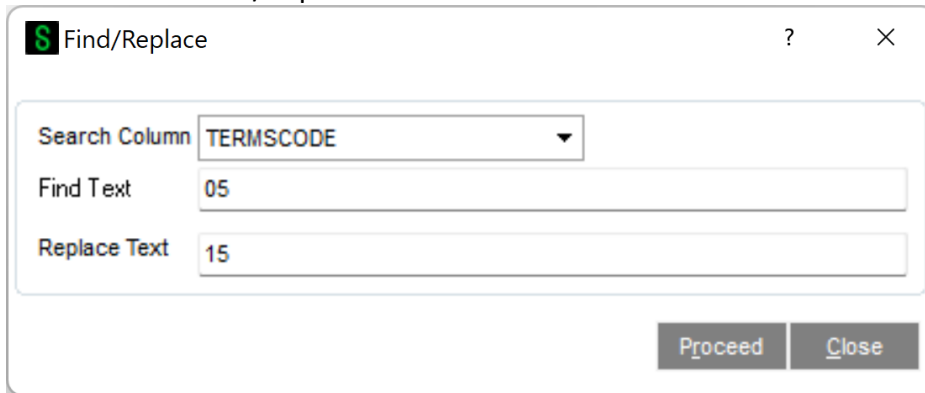
A "More" dropdown button located in the bottom margin of the screen offers the following two tasks:

- Search:

Select Field	Operand	Value
APDivisionNo	All	
VendorNo	All	
VendorName	All	
AddressLine1	All	
AddressLine2	All	
AddressLine3	All	
City	Equal to	San Diego
State	All	
ZipCode	All	
CountryCode	All	
PrimaryContact	All	
TelephoneNo	All	
TelephoneExt	All	
TelephoneType	All	
FaxNo	All	
EmailAddress	All	
URLAddress	All	

OK Cancel ?

- Find/Replace:

A screenshot of a 'Find/Replace' dialog box. The title bar shows a green 'S' icon, the text 'Find/Replace', a question mark, and a close button. The dialog contains three input fields: 'Search Column' with a dropdown menu showing 'TERMSCODE', 'Find Text' with the value '05', and 'Replace Text' with the value '15'. At the bottom right, there are two buttons: 'Proceed' and 'Close'.

All data is saved upon the Accept of the grid.

A message prompt will occur upon accepting record changes, inviting a backup of the table before proceeding.

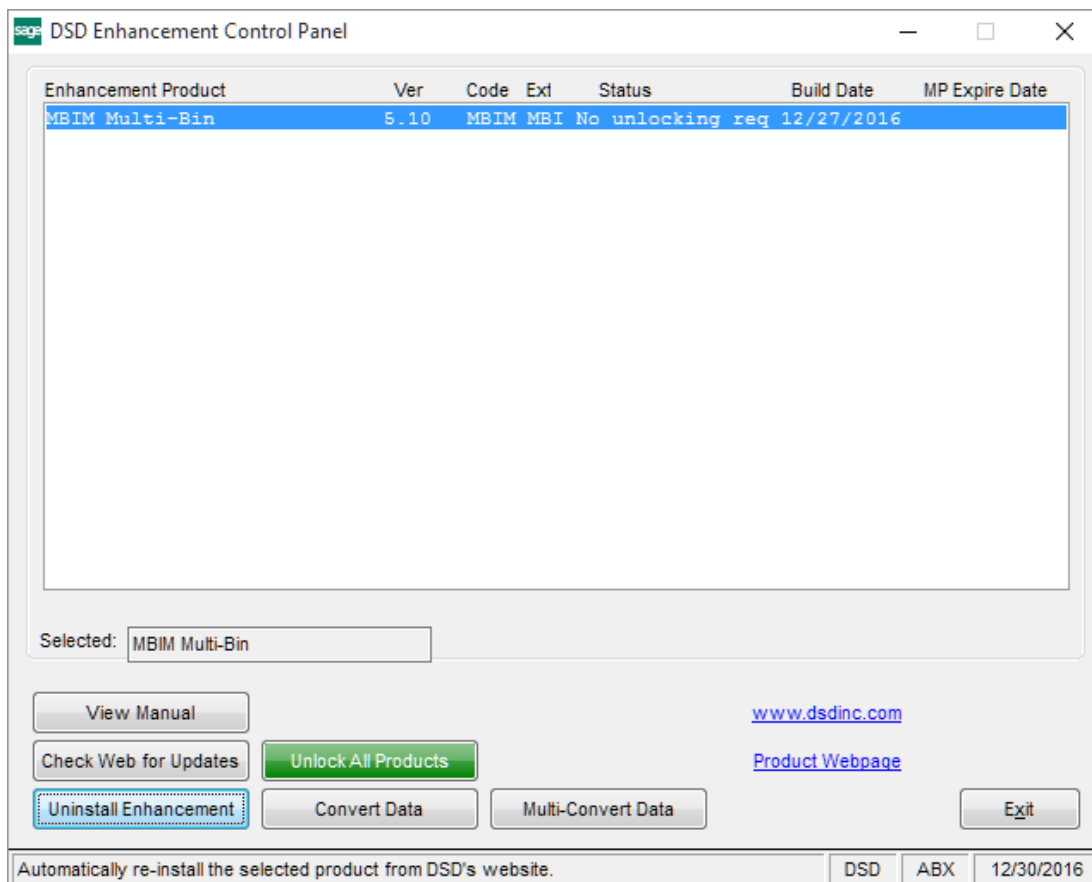
- A copy of the selected table will be created in the company's module data directory.

Audit tracking exists to capture all data edits and save them to the following file:

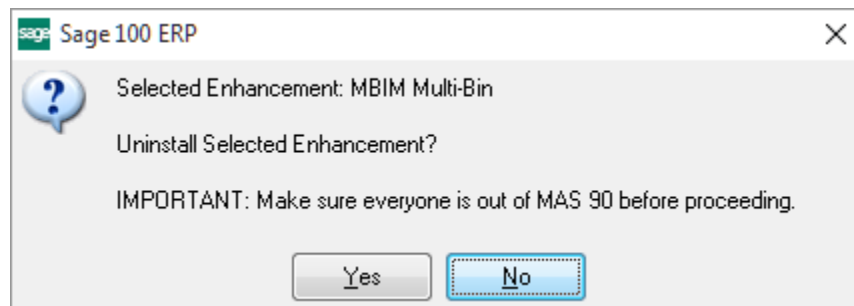
CI234_LMAD_AdvDataEditorAudit

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.

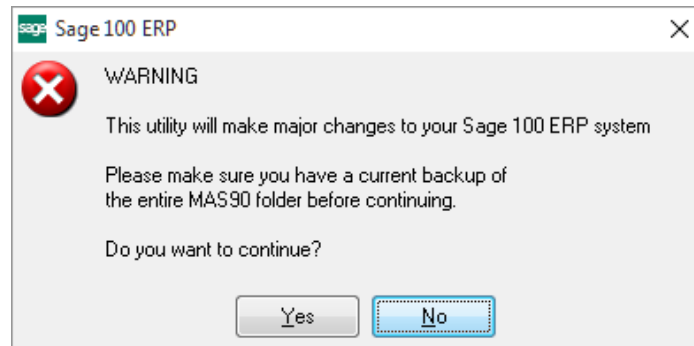


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



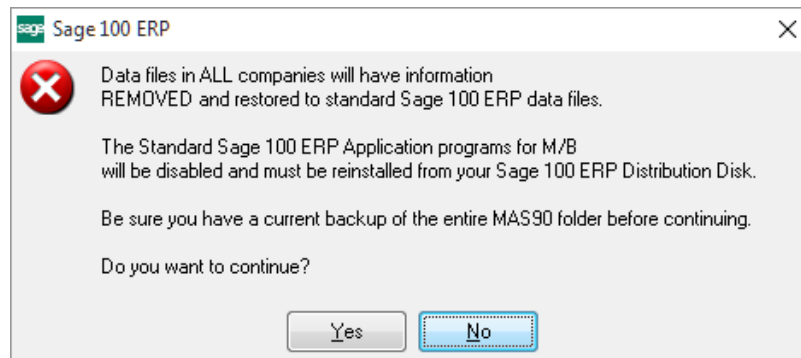
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

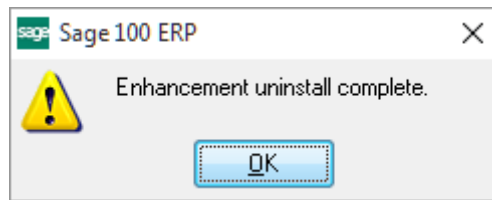
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).