DSD Business Systems

Sage 100 Enhancements

MBDD

DSD / ScanForce Multi-Bin Advanced Demo Data

Version 5.40

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DSD / ScanForce Multi-Bin Advanced Demo Data 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

MBDD DSD / ScanForce Multi-Bin Advanced Demo Data:

http://www.dsdinc.com/enhancement/MBDD-multi-bin-advanced-demo-data/

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.

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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.

DSD / ScanForce Multi-Bin Advanced Demo Data Features

The **DSD / ScanForce Multi-Bin Advanced Demo Data** enables the **Sage 100** reseller the ability to effectively demonstrate the features of the enhancement to an end-user. Demo data has been created for the **ABC Company Code** for all distribution modules.

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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
MB Advanced	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.

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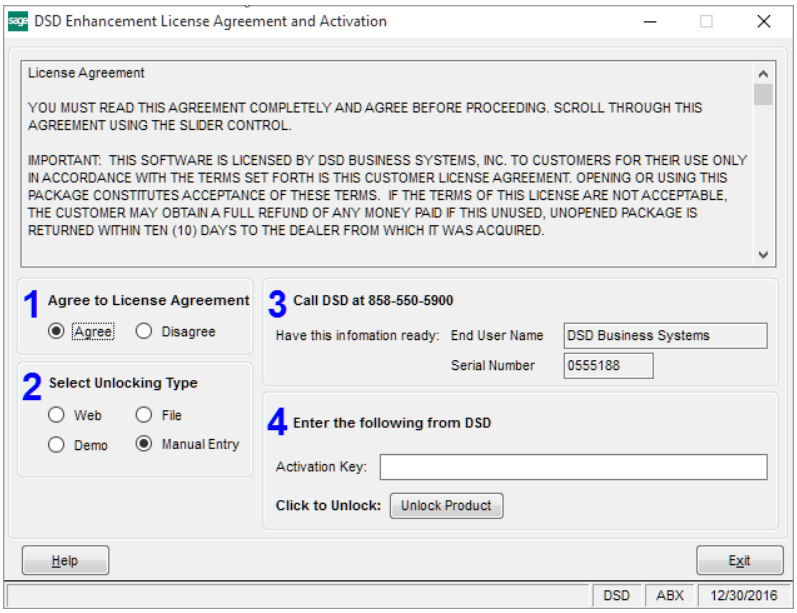
Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from 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.*

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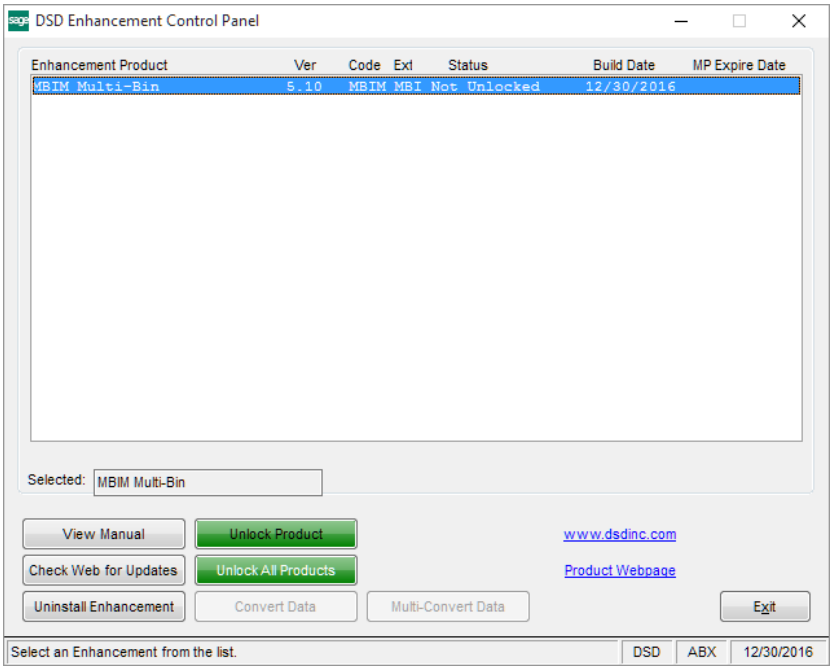
DSD Enhancement Control Panel

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.

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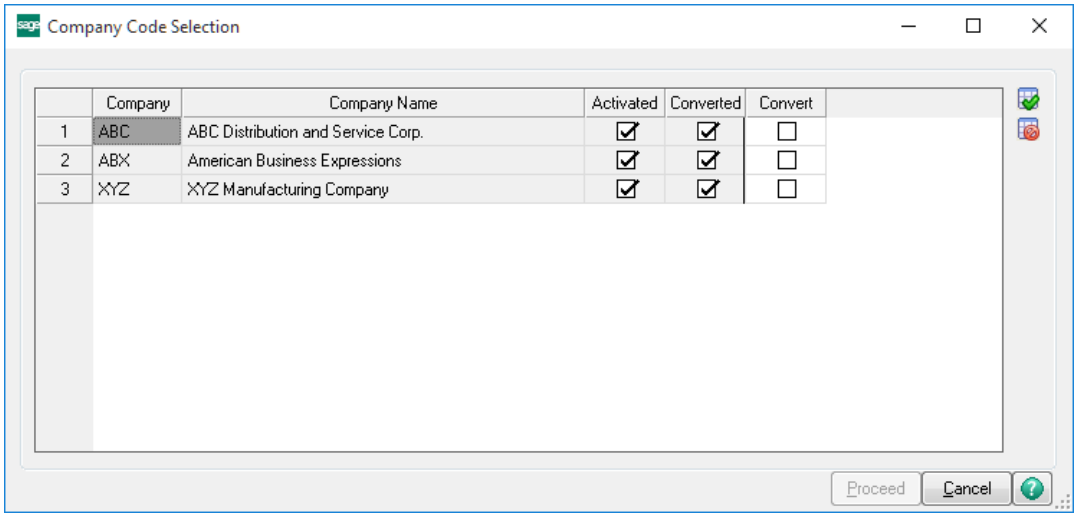
Multi-Convert Data: Multiple Companies can be converted at the same time for a given Enhancement. (*If you have a large number of Companies to convert, please do in batches of 20 or fewer due to memory limitations.)*



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.

Section C: Setup

Initial Setup of DSD / ScanForce Multi-Bin Advanced with Demo Data

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1. Install standard Sage 100 with ABC Demo Data. **Note:** If ABC Demo data is not installed you may still proceed as long as an ABC Company is Activated before installation.

2. Run Sage 100, to fully finish the standard installation procedure. Go to Library Master/ Security/ Product Registration. Make sure the Company Name and Registration ID are not blank as this is required for the DSD module registration, even in Demo mode.

3. Download and install each of the DSD / ScanForce Multi-Bin modules and documentation that you wish to demo.

4. Download and install the MBDD executable and read the accompanying documentation.

5. Run Sage 100. You will see the installation of each enhancement module. Make sure to review all Role Mainteannce options to ensufre you have full security for the new module.

   Note: All Period End Processing is disabled in Demo mode registration.

   Note: In order to use the Bill of Materials demo data contained in this installer, the Bill of Materials Module must be activated in company ABC prior to installation.

Multi-Bin Options

This is the starting point in setting up the DSD / ScanForce Multi-Bin Advanced Module.

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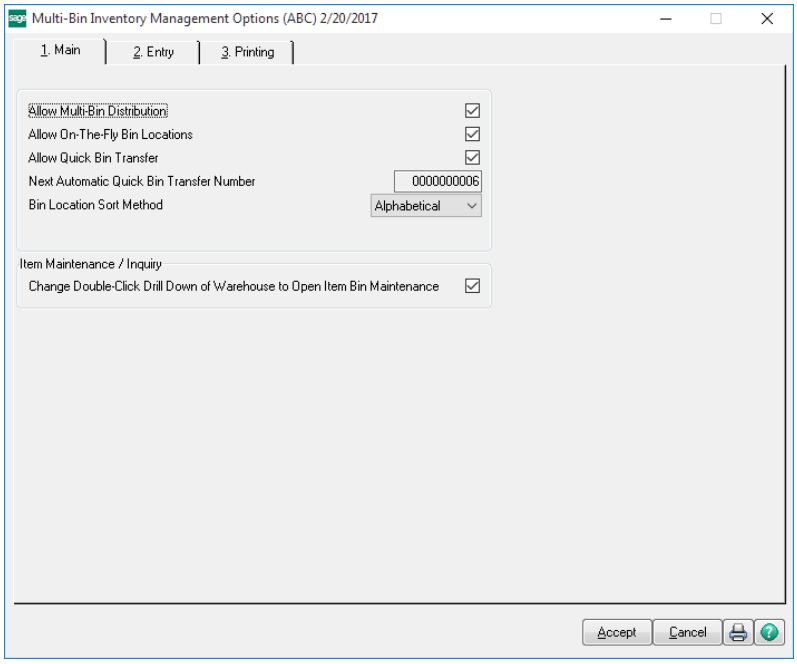

As you can see, “Allow Multi-Bin Distribution” has been enabled for the company. Options can be enabled/disabled as desired. With the Multi-Bin Advanced Demo Data, Options which are specific to the Advanced version, like Auto-Allocations, Allocations during S/O Picking Sheet Printing, and Replenishement Options, have already been set for you.

Location Type Maintenance

Location Type Maintenance has been setup with several samples of Location Types – “Overstock”, “Picking”, “Receiving”, “Shipping”, and “Showroom”. The “Overstock” and “Showroom” locations have no transaction restrictions, all others contain restrictions on various transaction types.

Warehouse Bin Maintenance

Multi-Bin has been enabled for Warehouse Codes “000”, “001” and “002”. Warehouses “000” and “001” contain a bin structure, whereas Warehouse Code “002” does not. Allocations are disabled in Multi-Bin Advanced.

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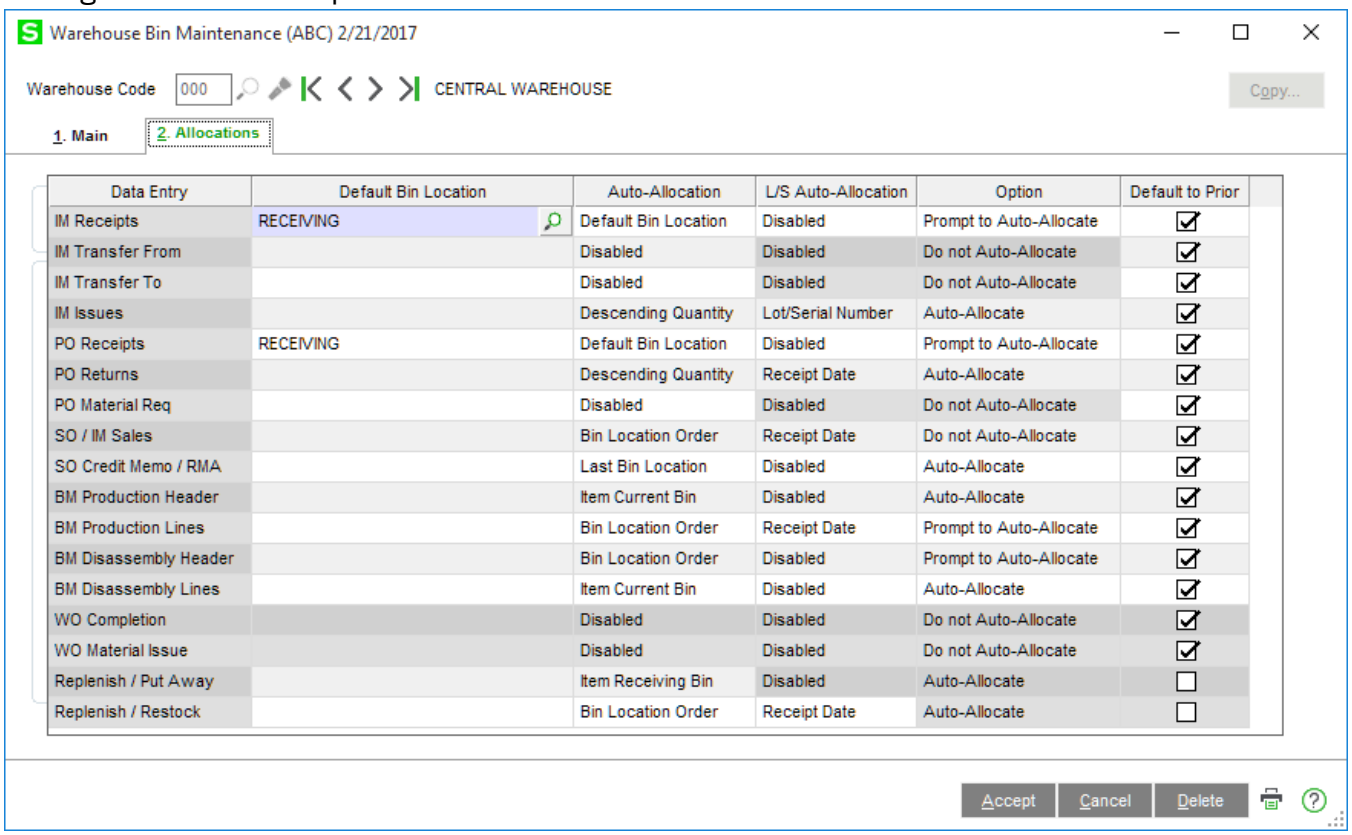
With the Multi-Bin Advanced Demo Data installed, Default Bin Locations and Auto-Allocation settings have also been pre-defined for Warehouse “000”.



Data Entry	Default Bin Location	Auto-Allocation	L/S Auto-Allocation	Option	Default to Prior
IM Receipts	RECEIVING	Default Bin Location	Disabled	Prompt to Auto-Allocate	☑
IM Transfer From		Disabled	Disabled	Do not Auto-Allocate	☑
IM Transfer To		Disabled	Disabled	Do not Auto-Allocate	☑
IM Issues		Descending Quantity	Lot/Serial Number	Auto-Allocate	☑
PO Receipts	RECEIVING	Default Bin Location	Disabled	Prompt to Auto-Allocate	☑
PO Returns		Descending Quantity	Receipt Date	Auto-Allocate	☑
PO Material Req		Disabled	Disabled	Do not Auto-Allocate	☑
SO / IM Sales		Bin Location Order	Receipt Date	Do not Auto-Allocate	☑
SO Credit Memo / RMA		Last Bin Location	Disabled	Auto-Allocate	☑
BM Production Header		Item Current Bin	Disabled	Auto-Allocate	☑
BM Production Lines		Bin Location Order	Receipt Date	Prompt to Auto-Allocate	☑
BM Disassembly Header		Bin Location Order	Disabled	Prompt to Auto-Allocate	☑
BM Disassembly Lines		Item Current Bin	Disabled	Auto-Allocate	☑
WO Completion		Disabled	Disabled	Do not Auto-Allocate	☑
WO Material Issue		Disabled	Disabled	Do not Auto-Allocate	☑
Replenish / Put Away		Item Receiving Bin	Disabled	Auto-Allocate	☐
Replenish / Restock		Bin Location Order	Receipt Date	Auto-Allocate	☐

Segment Code Maintenance

Segment Codes have been defined for Warehouse Codes ”000” and “001”.

Product Line Bin Maintenance

No settings have been defined in the demo data for Product Line Bin Maintenance.

Section D: System Operations

Bin Location Maintenance

Many sample Bin Locations have been defined in the Demo Data, many of which have transaction, customer, or item based restrictions. Here are some examples:

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All Bins with "Picking Location" in the Bin Description field are all restricted from IM Receipts, PO Receipts, PO Returns, and PO Mat Req.

The Warehouse "000", "RECEIVING" bin location does not allow IM Issues, PO Returns, PO Mat Req, or SO/IM Sales/RMA.

Warehouse "000" Bin Location "A-100-00" is restricted to only customer "01-ABF".

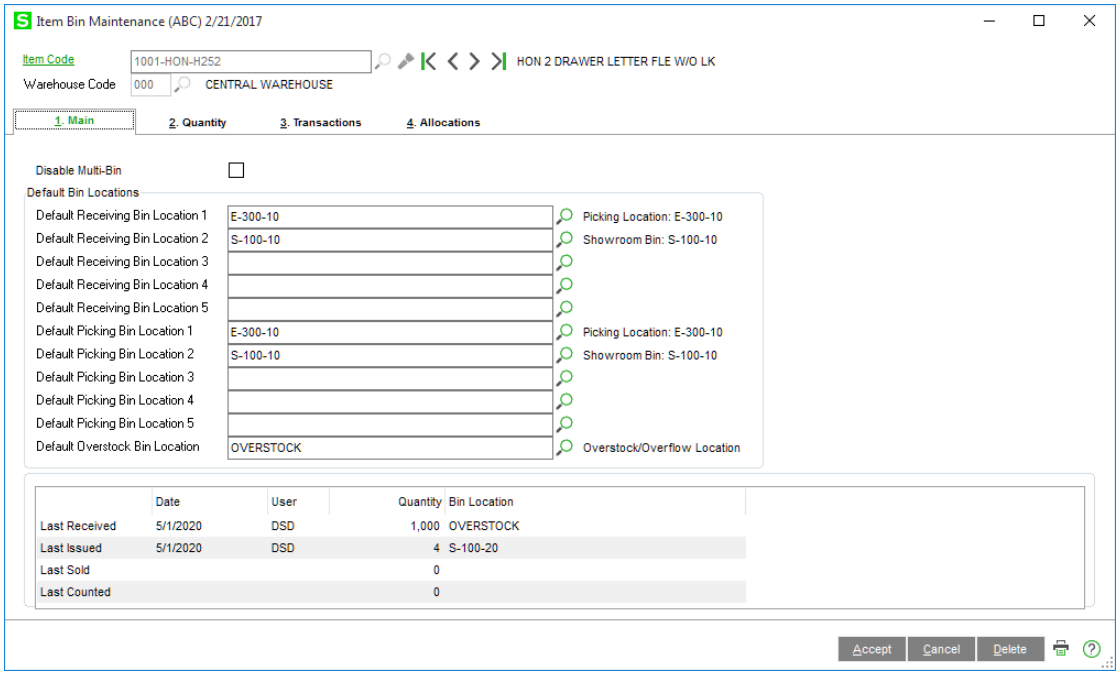
Warehouse "001" Bin Location "A-100-10" is restricted to only product line "C&A".

Warehouse "000" Bin Location "SHIPPING", does not allow for PO Reciepts and PO Returns.

"Showroom" bins "S-100-10" through "S-100-90" contain various item min max quantities.

Item Bin Maintenance

With the Multi-Bin Advanced Demo Data installed, Default Receiving Bins, Default Picking Bins and Overstock locations have been assigned to many of the Item Codes. These default locations are used when performing Replenishement Selections, and during Auto-Allocations.



Data Entry Tasks

The following data entry tasks within Sage 100 contain data for demoing the DSD / ScanForce Multi-Bin Advanced Module:

- I/M Transaction Entry
- I/M Physical Count

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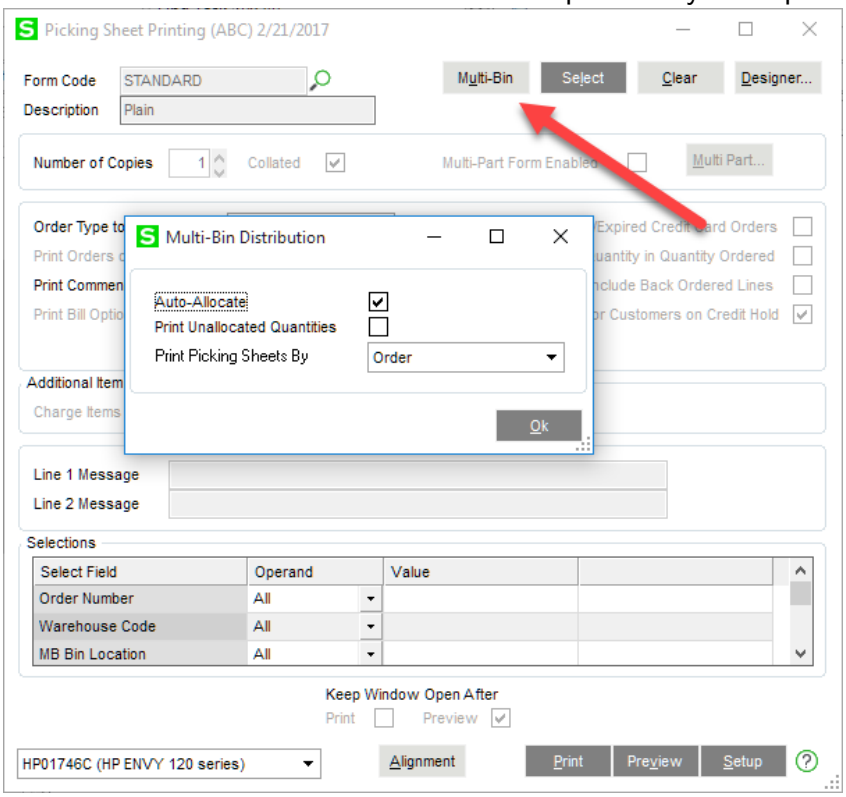
- P/O Receipt Entry
- S/O Sales Order Entry
- S/O Invoice Data Entry
- B/M Production Entry

It is important to review this data, as well as the DSD / ScanForce Multi-Bin Advanced User's Manual, prior to demoing the product.

Sales Order Picking Sheet Printing

With the Multi-Bin Advanced Demo Data Installed, the Multi-Bin and Sales Order modules hav ebeen setup to allow Auto- Allocations during the Picking Sheet printing process. To demo this feature, select the Multi-Bin button in the Picking Sheet Printing screen and enable the Auto-Allocation option. After printing the selected picking sheets, allocations will be performed for all items which quanties are available and allocations have not previously been performed.



Replenishment Selection & Entry

The Multi-Bin Advanced Demo Data has been specifically designed to demonstrate the Replenishement Selection and Entry features that are included with the DSD / ScanForce Multi-Bin Advanced Module.

Here are some examples of how to demo the Replenishment Selection process:

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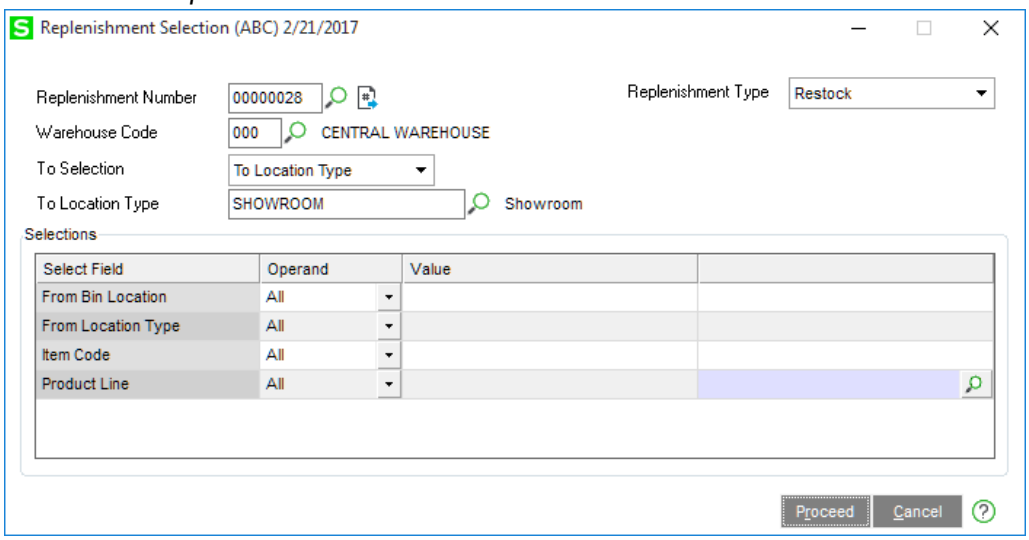
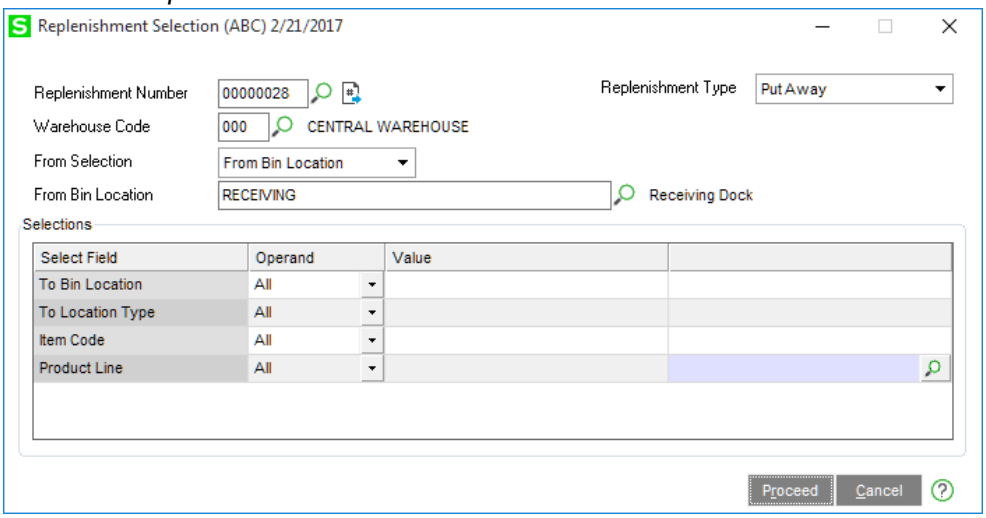
Create a new Replenishement Number, select the "Restock" Replenishment Type. Select Warehouse Code "000". For the "To Selection" choose "To Location Type" and select "SHOWROOM". Launch the Replenishment Entry task to view entries created from the Replenishment Selection process.



Create a new Replenishement Number, select the "Put Away" Replenishment Type. Select Warehouse Code "000". For the "From Selection" choose "From Bin Location" and select "RECEIVING". Launch the Replenishment Entry task to view entries created from the Replenishment Selection process.



Create a new Replenishement Number, select the "Overstock" Replenishment Type. Select Warehouse Code "000". Launch the Replenishment Entry task to view entries created from the Replenishment Selection process.

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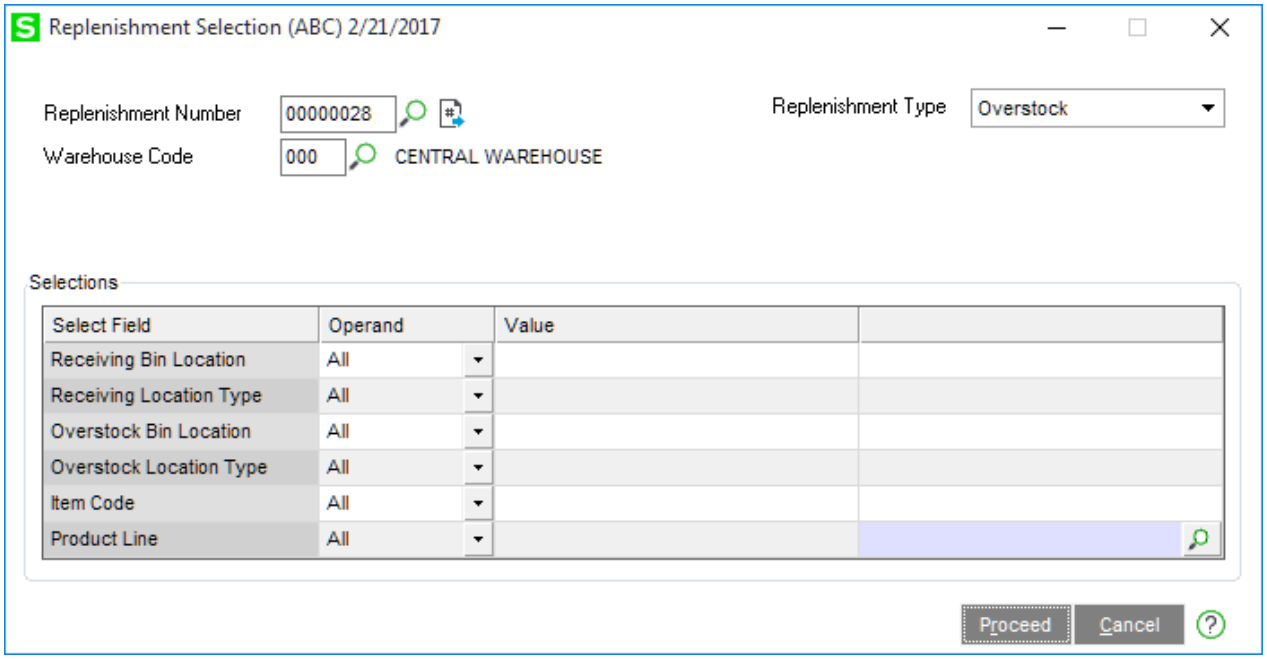

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