



DSD Business Systems

Sage 100 Enhancements

PRTT

P/R Oregon Transit Tax Conversion

Version 6.20



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P/R Oregon Transit Tax Conversion User's Manual
Version 6.20

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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*

PRTT P/R Oregon Transit Tax Conversion:

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

P/R Oregon Transit Tax Conversion Features

The **PRTT Oregon Transit Tax Conversion** for the Sage 100 Payroll module converts Oregon Employee State Disability Insurance (SDI) information to 'Other' Information after a user is upgraded and converted to the 2018 and above versions of Sage 100 (Payroll versions 2.17 and above).

When the state of Oregon added the **Transit Tax** requirement in 2018, Sage only added the feature to the 2018 and above versions of Sage 100. This required that, for users on versions 2017 (5.40) and below, that the user setup State Disability Insurance (SDI), which Oregon doesn't use, to store this information.

Once the user is fully upgraded to the 2018 version, then this product will convert the State Disability Insurance (SDI) information to 'Other' Information in the following data files:

- ◆ PR_EmployeeTaxHistory
- ◆ PR_EmployeeTaxHistoryOther
- ◆ PR_PayrollHistoryTaxReporting
- ◆ PR_PayrollHistoryTaxRepOther
- ◆ PR_PayrollHistoryTaxDetail
- ◆ PR_PayrollHistoryTaxDtlOther

There are no menu items added to Sage 100 for this product, except for the DSD Enhancement Control Panel. It is from this panel that the Conversion for the Transit Tax is run.

Please refer to section **D: Setup and Operations** for use of this product.

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
P/R	Y	2.xx

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*.

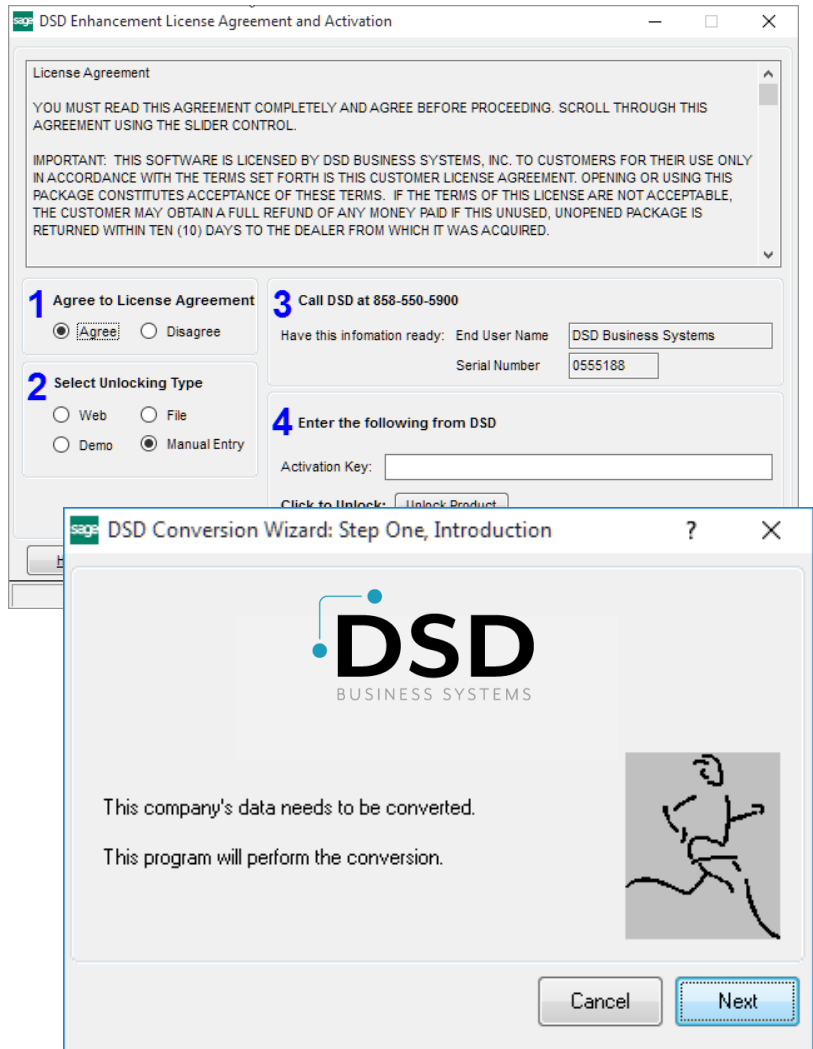
- The Sage 100 system that is being used must have web access for this option to be effective.
- You can send your Sage Serial Number to your DSD Enhancements sales representative.

Demo Unlock: Not available for this product.

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.



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.

Enhancement Product	Ver	Code	Ext	Status	Build Date	MP Expire Date
AP-1085 Multi Comp Vendor S	6.00	A085	A21	Unlocked	08/31/2018	08/31/2019
APNV A/P Next Vendor Number	6.00	APNV	PNV	Unlocked	08/16/2018	08/16/2019
ARMU A/R Multi-Comp Inv Ent	6.00P2	ARMU	RMU	Unlocked	06/02/2018	07/29/2019
PR32 P/R Oregon Form 132 Ex	2.18P1	PR32	R32	Unlocked	08/14/2018	07/13/2019
MRCA Qtr Unemployment Repor	2.18P1	MRCA	RCA	Unlocked	07/13/2018	07/13/2019
MRNY Qtr Unemployment Repor	2.18P1	MRNY	RNY	Unlocked	07/17/2018	09/04/2019
MROH Qtr Unemployment Repor	2.18P1	MROH	ROH	Unlocked	03/23/2018	09/04/2019
PRTT Transit Tax Conversion	2.18	PRTT	RTT	Unlocked	10/15/2018	10/24/2019
VIEU V/I Export During Upda	6.00	VIEU	VIE	Unlocked	07/29/2018	07/29/2019

Selected: Sage Serial Number

www.dsdinc.com

Convert or re-convert the current company data for the selected product. DSD JON 10/24/2018

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.

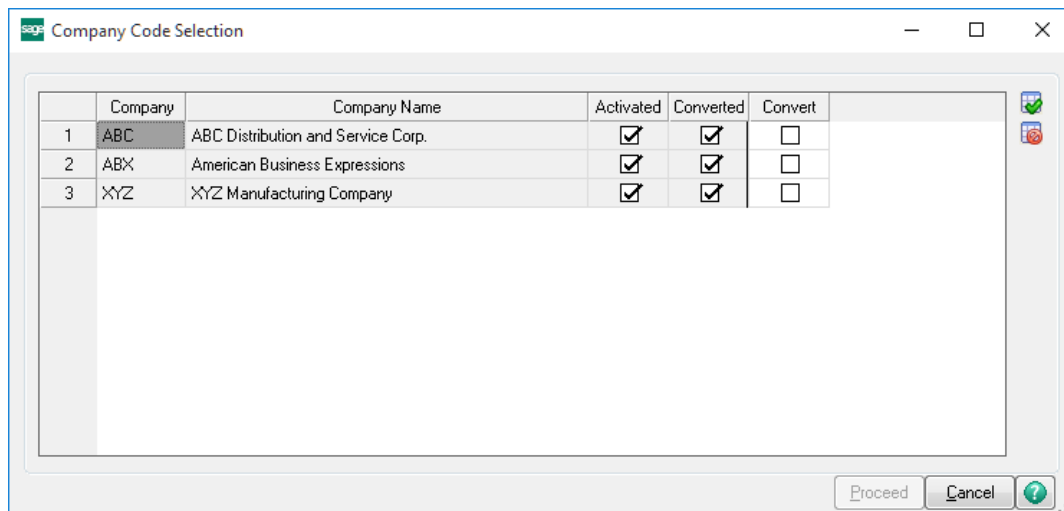
Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

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.

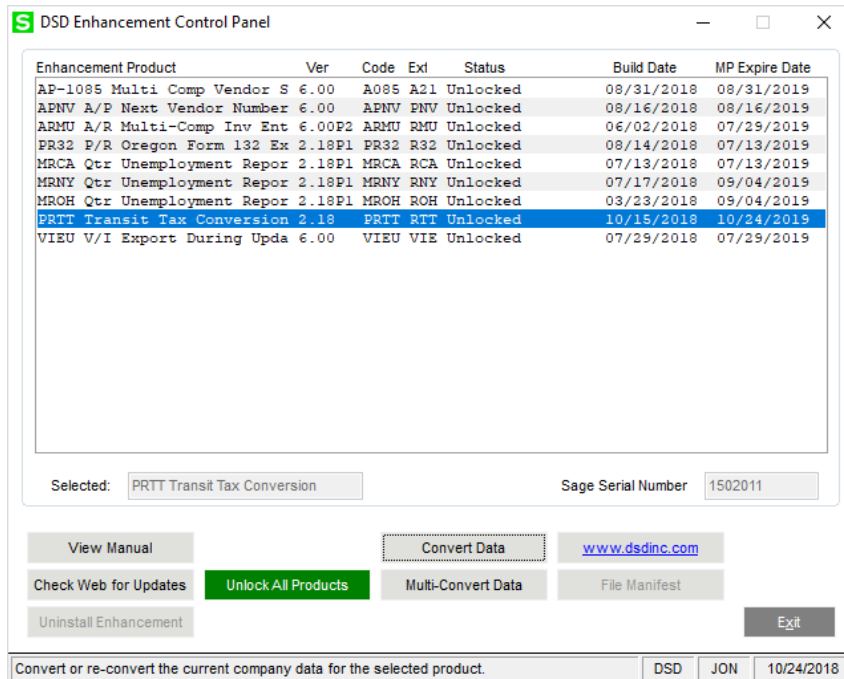
Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

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 and Operations

There are no menu items added to Sage 100 for this product, except for the **DSD Enhancement Control Panel**. It is from this panel that the Conversion for the Transit Tax is run.

Select the **DSD Enhancement Control** from the Library Master / Setup menu:



Highlight the **PRTT Transit Tax Conversion** enhancement from the selection panel, then select one of the following buttons at the bottom of the panel:

- ◆ **Convert Data Button** – select this button to only convert the existing company.
- ◆ **Multi-Convert Data Button** – select this button to convert all companies that have the Payroll module activated and setup.

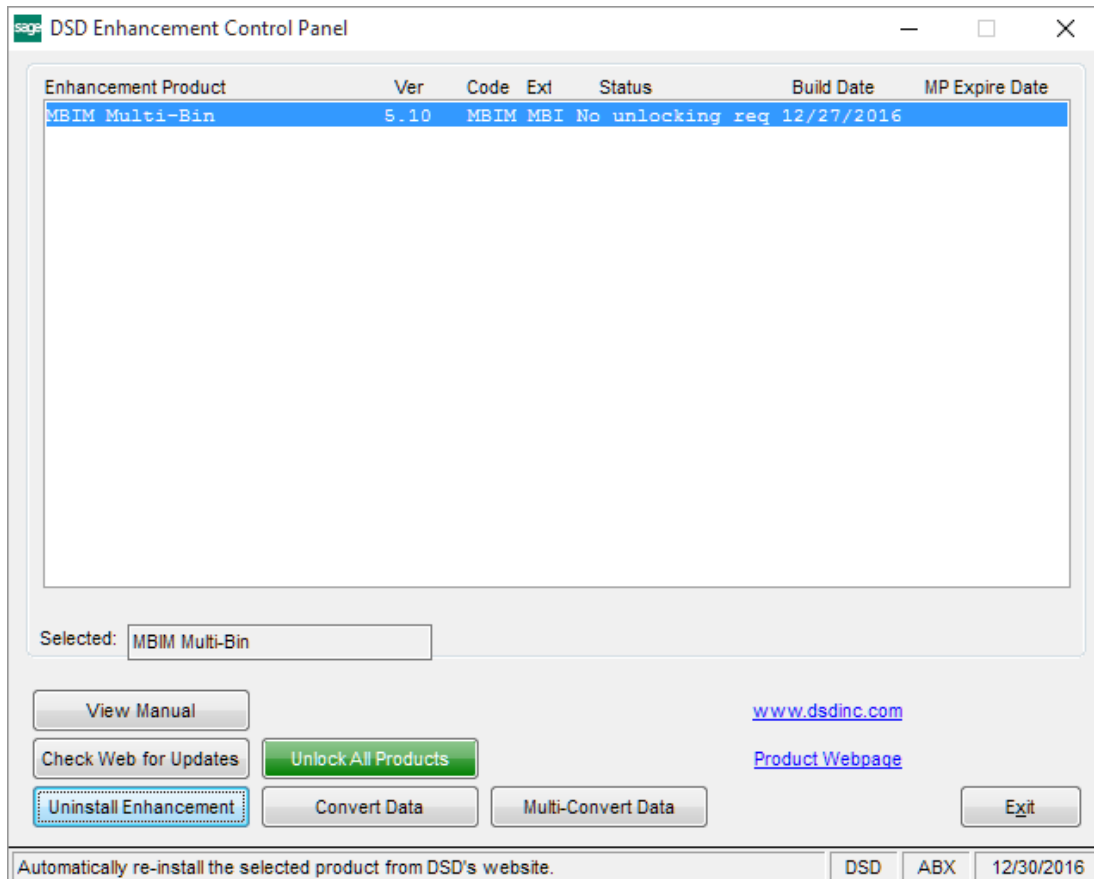
IMPORTANT: Please have backups of your company data prior to running this utility.

The conversion program will convert (move) the Oregon Employee State Disability Insurance (SDI) information to 'Other' Information in the following data files:

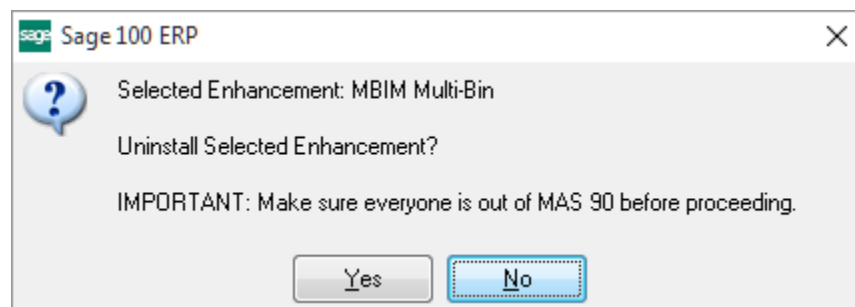
- ◆ PR_EmployeeTaxHistory
- ◆ PR_EmployeeTaxHistoryOther
- ◆ PR_PayrollHistoryTaxReporting
- ◆ PR_PayrollHistoryTaxRepOther
- ◆ PR_PayrollHistoryTaxDetail
- ◆ PR_PayrollHistoryTaxDtlOther

Section D: 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.

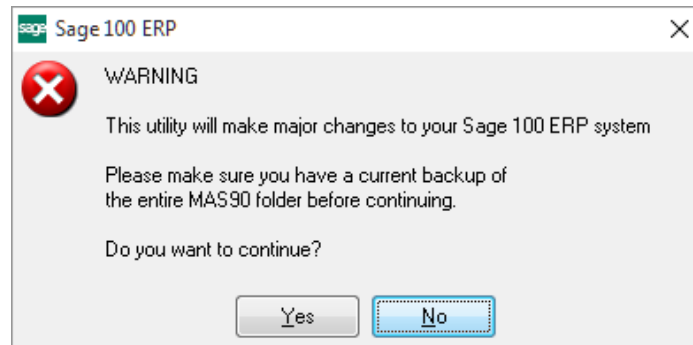


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.

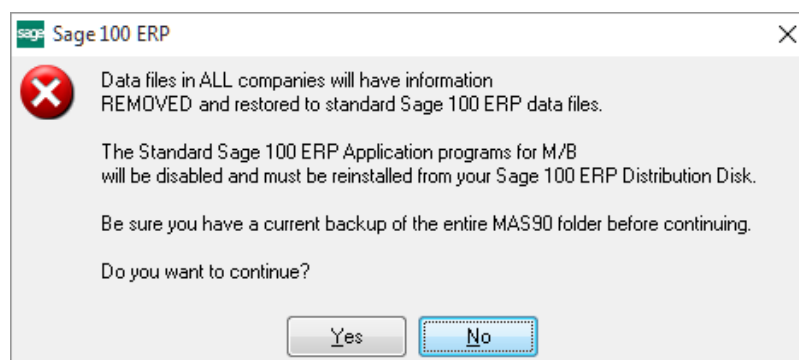
After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

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.

