



DSD Business Systems

Sage 100 Enhancements

S010

S/O Data Entry Tracking by User ID

SO-1010

Version 5.40



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S/O Data Entry Tracking by User ID 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*

S010 S/O Data Entry Tracking by User ID:

<http://www.dsdinc.com/enhancement/sales-order-data-entry-tracking-by-user-id-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.

S/O Data Entry Tracking by User ID Features

This DSD Extended Solution adds a pop up window to Sales Order Data Entry and Sales Order Quote History Inquiry that contains the names of the users who created or last modified the sales order, or converted a quote to a standard order as well as the date and time of each action.

From Sales Order Quote History Inquiry a fourth line is displayed showing the name of the user who deleted the Sales Order and the date and time it was deleted. These fields are 'display only' and cannot be accessed by the user.

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
S/O	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.

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.

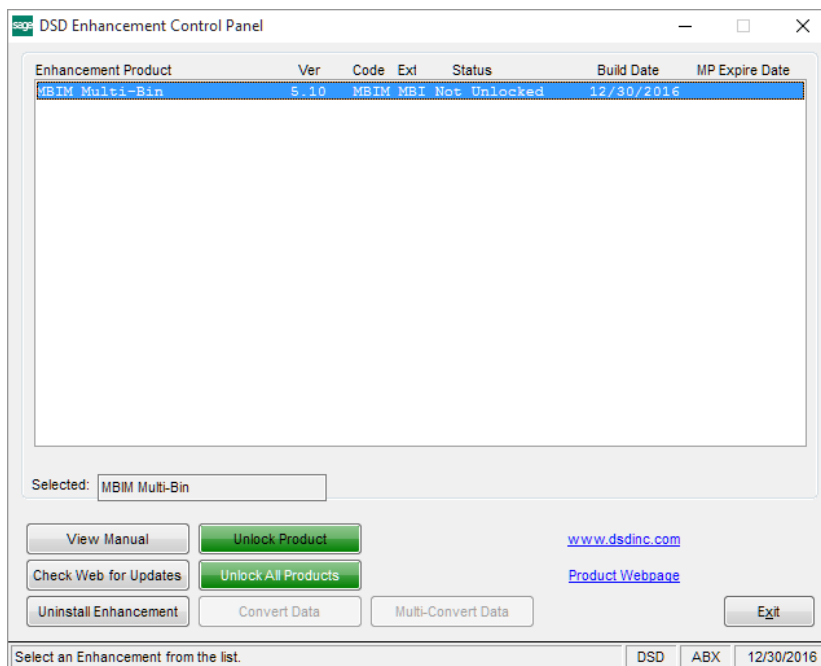
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct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

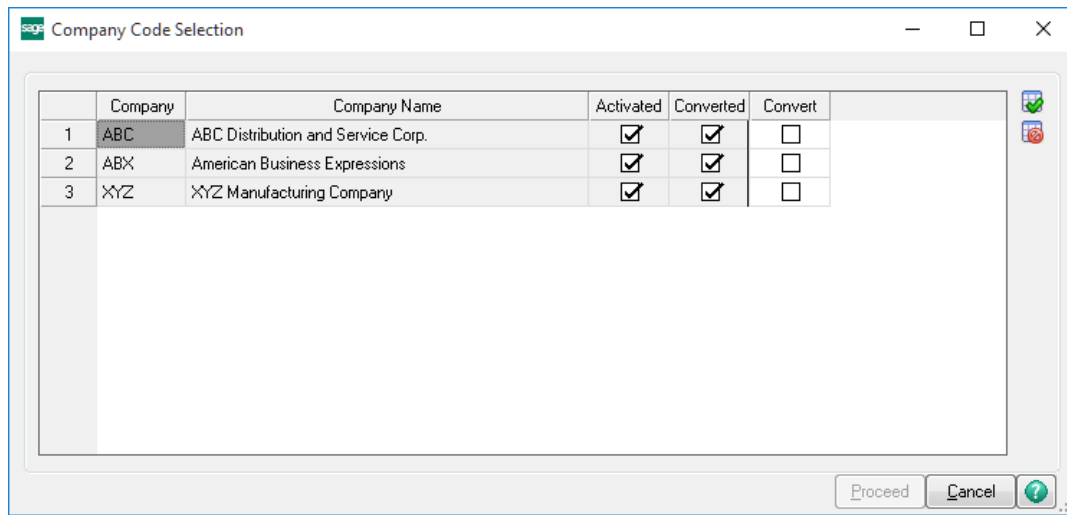
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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.)*



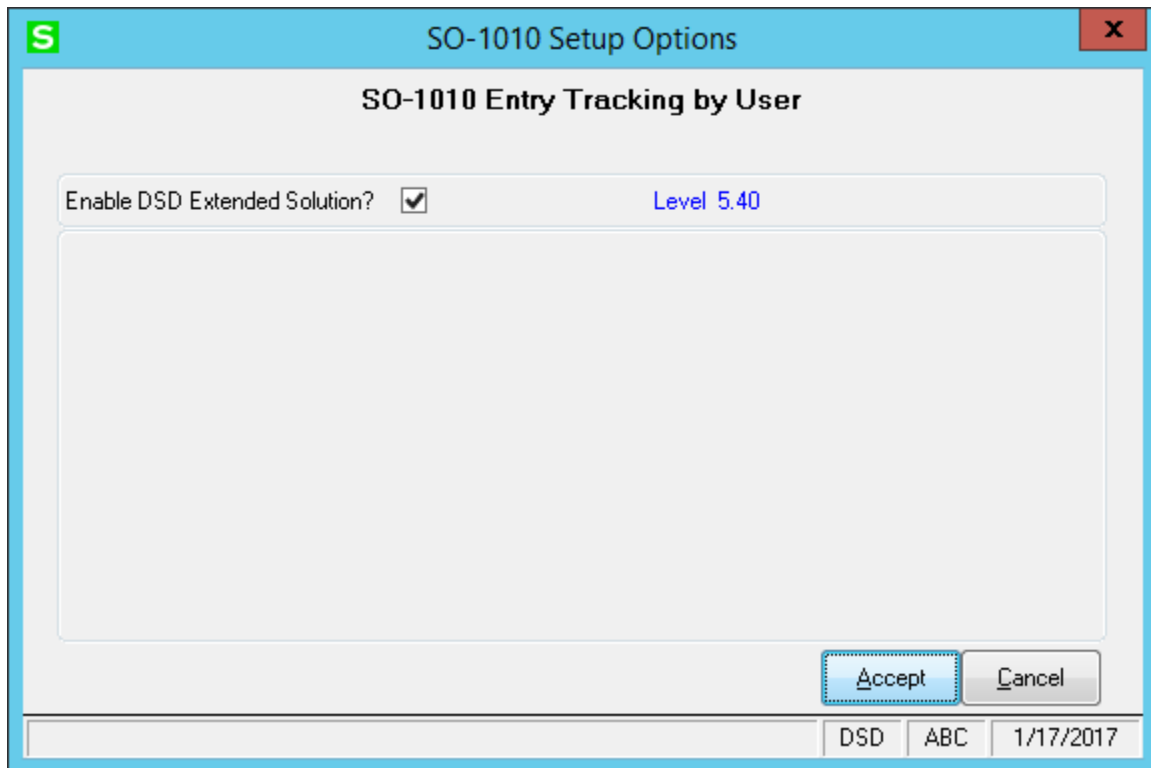
Help: The Help button, located at the bottom right of the window, opens an HTML help file.

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

Upon completion of software installation, you will need to access the DSD Extended Solutions Setup from the Sales Order 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.



If the standard Sales Order Setup questions 'Retain Sales Order/Quote History' and 'Retain Deleted Orders/Quotes in History' are answered 'Yes', then this Extended Solution will make a record the ID of the user who performed the deletion as well as the Date it was deleted.

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

Section D: System Operations

Sales Order Entry

A new drop list button has been added to Sales Order Entry. When you select the option 'Track...' S/O Data Entry Tracking by User ID will pop up. This screen displays the names of the users who created the sales order, last modified the sales order, or converted a quote to a standard order as well as the date and time of each action. The names which display are the ones associated with the user key who made the changes. These fields are display only.

Sales Order Entry (ABC) 2/9/2011

Order Number: 0000175

Order Date: 2/9/2011 | Order Type: Standard Order | Master/Repeating No.:

Customer No.: 01-ABF | American Business Futures

Cust PO:

Ship Date: 2/9/2011

Status: New | Reason:

Whse: 001 | EAST WAREHOUSE

Sales Tax: W1

Wisconsin:

Ship To Add: 2 | American Business Futures

Terms Code: 01 | Net 30 Days

Ship Via: UPS BLUE | FOB:

Confirm To: John Quinn

E-mail: artie@abf.com

Fax No.:

Comment:

Salesperson: 0100 | Jim Kentley

Split Comm.: No | Split Comm.:

Print Order: ☒

Print Pick Sheets: ☒

Quick Print Without Displaying Printing Window: ☐

Buttons: Print Order..., Print Pick..., Recalc Price, Track..., Accept, Cancel, Delete, ?

S/O Data Entry Tracking by User ID

Created by	Lisa B	on	02/09/2011	at	11:57 AM
Updated by	Lisa B	on	02/09/2011	at	11:59 AM
Converted by	John Russell	on	02/09/2011	at	11:58 AM

OK

Sales Order Quote History Inquiry

If the Sales Order Setup question: 'Retain Sales Order/Quote History', has been checked, then S/O Data Entry Tracking by User ID may also be accessed during Sales Order Quote History Inquiry by selecting 'Track...' from the drop list button.

Sales Order Quote History Inquiry (ABC) 2/9/2011

Order Number: 0000175 | Invoices... | Credit...

1. Header | 2. Address | 3. Lines | 4. Totals

Order Date: 2/9/2011 | RMA No.: | Master/Repeating No.: |

Customer No.: 01-ABF | American Business Futures
Customer PO: |

Status: Deleted Order | Ship To Addr: 2 | American Business Futures
Cancelled Code: | Terms Code: 01
Last Invoice Date: | Ship Via: UPS BLUE | FOB: |
Last Invoice No.: | Warehouse: 001 | EAST WAREHOUSE
Sales Tax: | Confirm To: JOHN QUINN
Schedule: W1 | E-mail: artie@abf.com
Wisconsin: | Comment: |
Salesperson: 0100 | Jim Kentley
Split Comm.: NO

Track... | OK | ?

In addition to displaying the tracking information for Created by, Updated by, and Converted by, if the standard Sales Order Setup question: 'Retain Deleted Orders/Quotes in History', has been checked, then the Deleted by user name along with date and time will also be displayed.

S/O Data Entry Tracking by User ID

Created by	Lisa B	on	02/09/2011	at	11:57 AM
Updated by	Lisa B	on	02/09/2011	at	12:01 PM
Converted by	John Russell	on	02/09/2011	at	11:58 AM
Deleted by	Lisa B	on	02/09/2011	at	12:01 PM

OK

Created by, Updated by, and Converted by user keys are only recorded in the Sales Order History file if the action took place when Sales Order History was enabled. The Deleted by user key is only recorded if you additionally elected to retain Deleted Orders in Quote History.

ODBC Dictionary

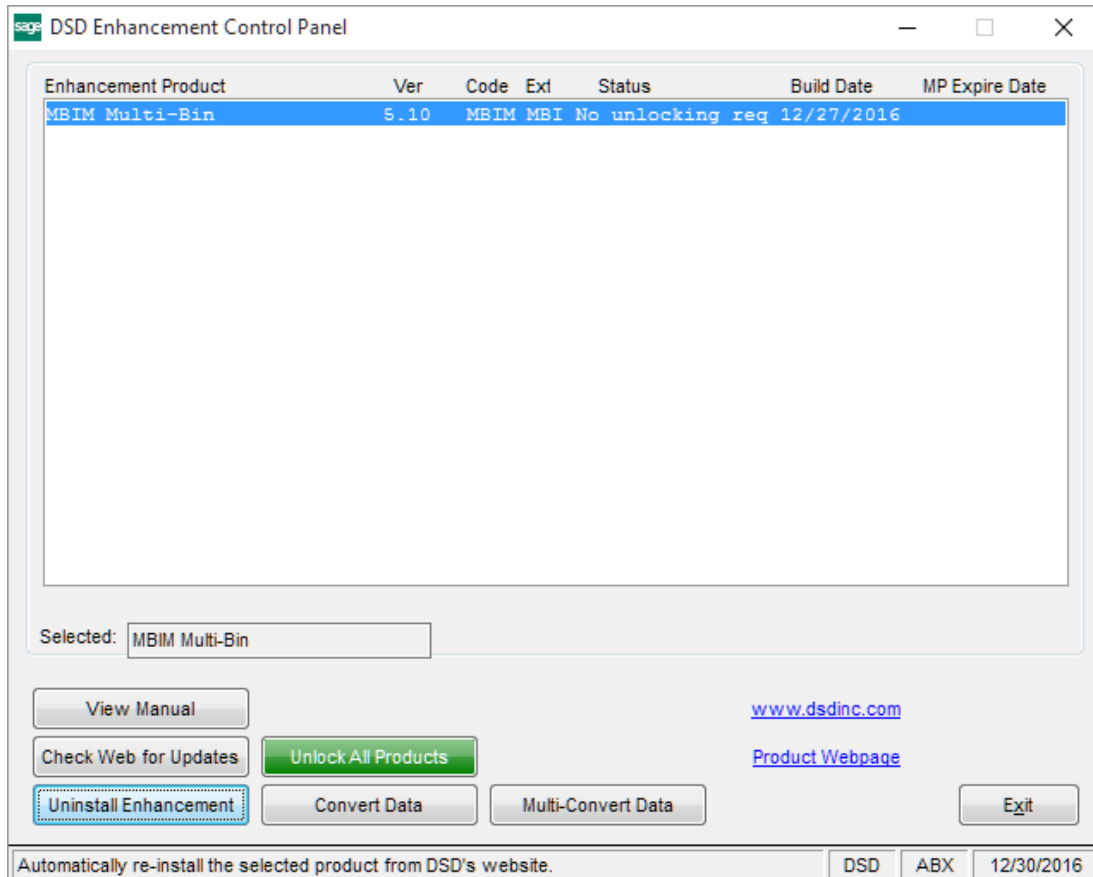
The files listed below have been added or changed in the ODBC Dictionaries by this Extended Solution for Crystal Reports purposes.

<i>File</i>	<i>Fields</i>
SO_SalesOrderHeader.M4T	DateConverted_001 TimeConverted_001 UserConverted_001
SO_SalesOrderRecap.M4T	DateConverted_001 TimeConverted_001 UserConverted_001 DateCreated_001 TimeCreated_001 UserCreated_001
SO_SalesOrderHistoryHeader.M4T	DateConverted_001 TimeConverted_001 UserConverted_001 DateDeleted_001 TimeDeleted_001 UserDeleted_001

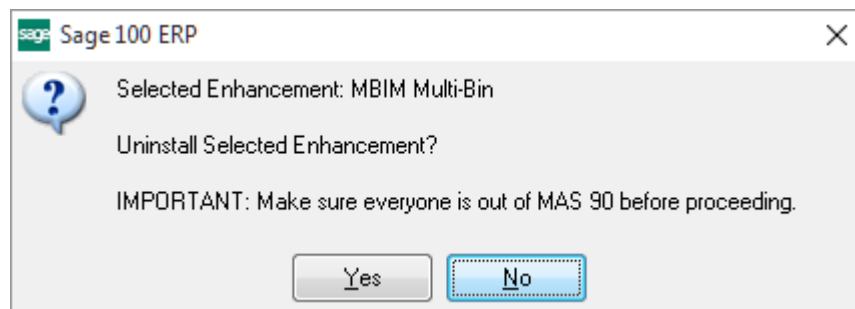
Be aware that the ODBC Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

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.

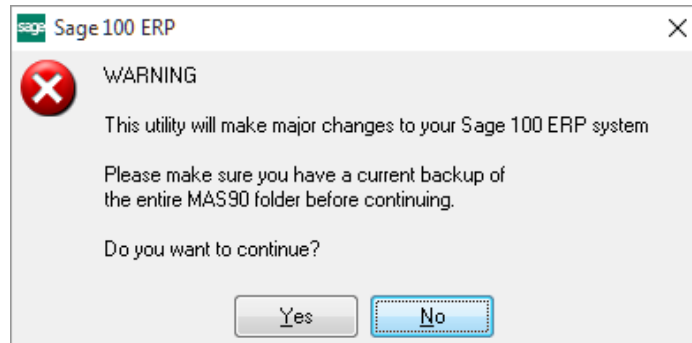


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.

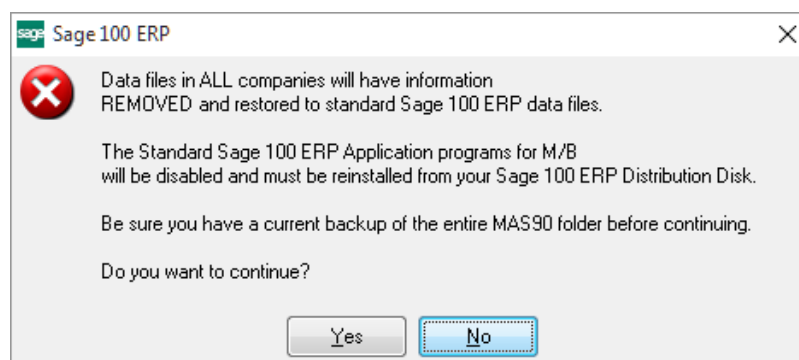
After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

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.

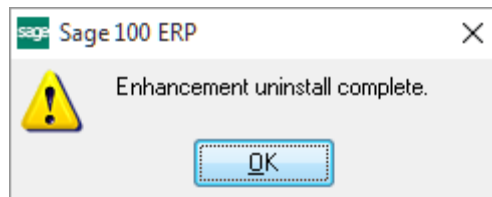
The following message box will appear, displaying the final warning message.



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).