

DSD Business Systems

Sage 100 Enhancements

S562

Restricted Purchase by Pharmaceutical License

S0-1562

Version 7.20



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Restricted Purchase by Pharmaceutical License User's Manual
Version 7.20

12 September, 2023

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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*

1562 Restricted Purchase by Pharmaceutical License:

<http://www.dsdinc.com/enh/pages/1562.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.

Restricted Purchase by Pharmaceutical License Features

This DSD Extended Solution restricts the sale of regulated inventory items in Sales Order Entry and S/O Invoice Entry. Three valid license numbers and expiration dates can be maintained by customer's ship to code. All items included on a sales order, invoice, or in an S/O Invoice batch will be restricted to the same license class. This enhancement validates a license number exists and the expiration date is current for the license class.

Section B: Getting Started

CAUTION

- 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	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.

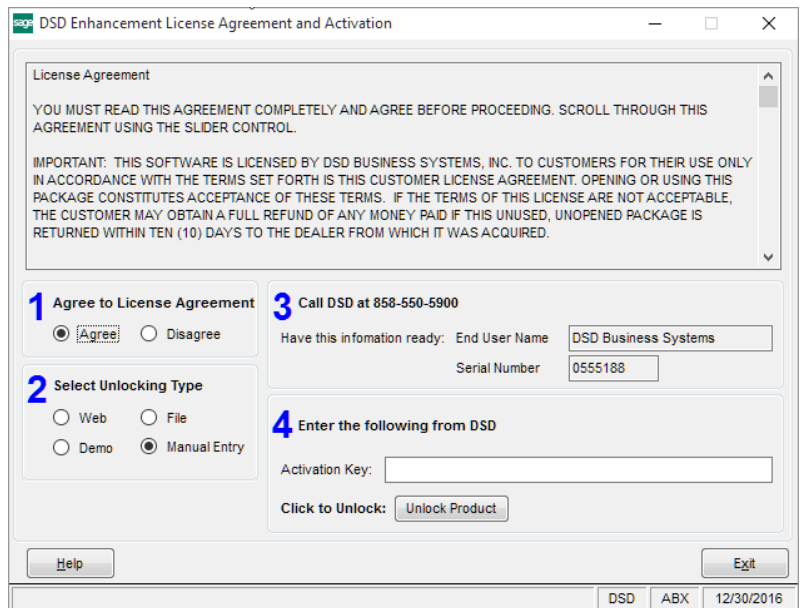
File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

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.

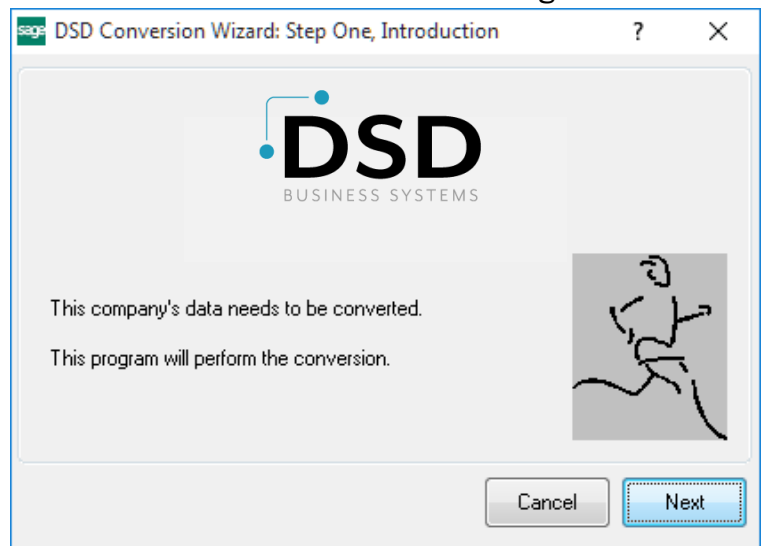
- Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.



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

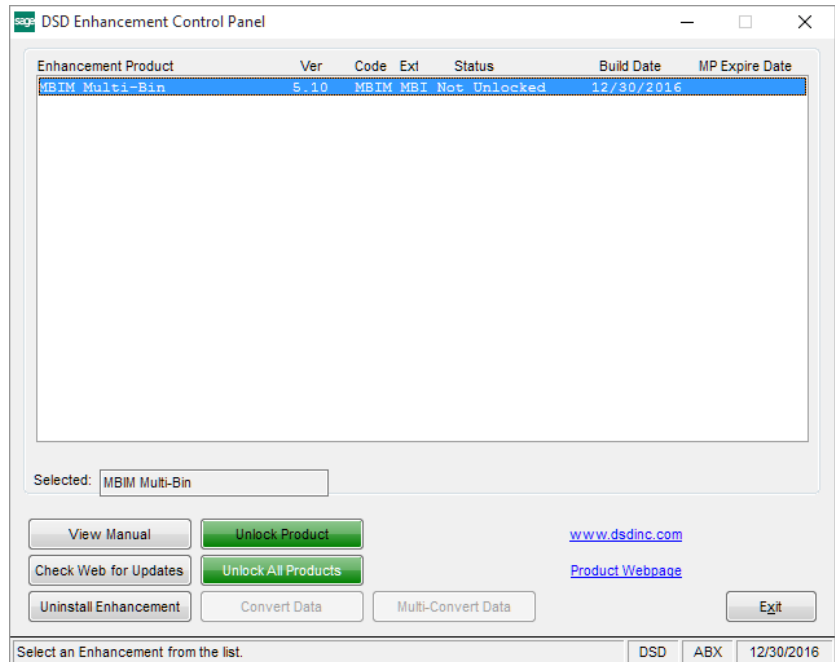
100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the “MAS90/PDF” folder and then displayed.

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.*

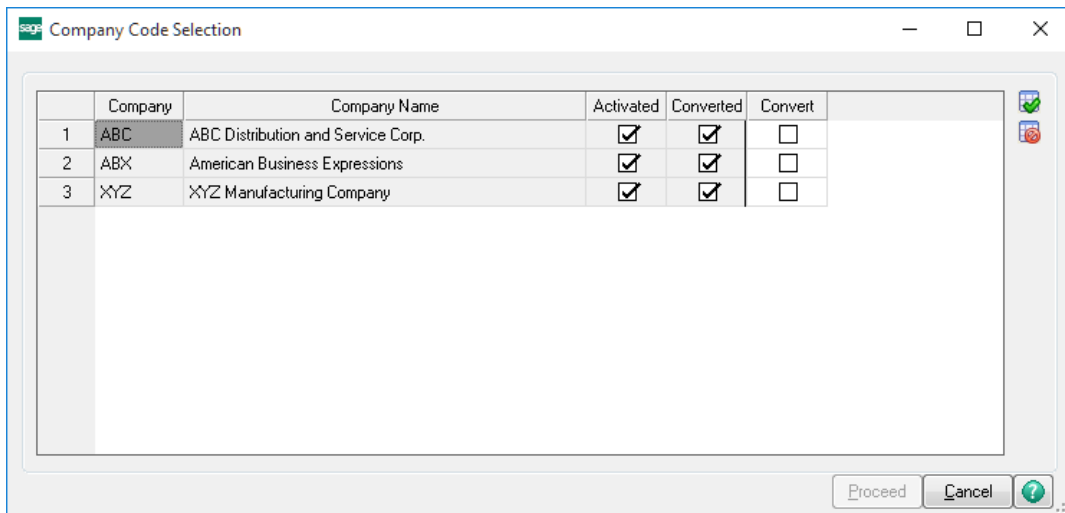
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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

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

Answer the following prompts:

The screenshot shows a software dialog box titled "SO-1562 Setup Options" with a sub-title "SO-1562 Restricted Purchase". At the top left is a green "S" icon, and at the top right is a red "X" icon. The main content area includes a checkbox labeled "Enable DSD Extended Solution" which is checked, and a blue text label "Level 7.10". Below this is a list of labels for various UDFs (User-Defined Functions) on the left, and corresponding input fields on the right. The first input field is a dropdown menu currently showing "COLOR". The other input fields are empty text boxes. Some of the input fields have a magnifying glass icon to the right, indicating a search function. At the bottom right of the dialog are two buttons: "Accept" and "Cancel". At the very bottom of the dialog is a status bar with three fields: "DSD", "ABC", and "9/12/2023".

S/O SALES ORDER HEADER UDF FOR 'LICENSE CLASS': Specify a drop-box type uppercase S/O Header UDF. There should be values of G, C, P defined in the UDFs validation list. You need to create an S/O Invoice Header UDF of the same name using the data source of this S/O Sales Order Header UDF. Both UDFs should be marked as "required".

ITEM CATEGORY FOR LICENSE CLASS: Choose the Item Category to store the inventory item's license class value.

ITEM CATEGORY VALUE FOR DEA: Enter the Item Category values that will be governed by the DEA.

ITEM CATEGORY VALUE FOR SALUD: Enter the Item Category values that will be governed by the SALUD.

ITEM CATEGORY VALUE FOR ASSMCA: Enter the Item Category values that will be governed by the ASSMCA.

S/O SHIP TO ADDRESS UDF FOR 'DEA LICENSE #': Enter the S/O Ship To Address UDF that will hold the DEA license number.

S/O SHIP TO ADDRESS UDF FOR 'DEA LICENSE EXPIRATION DATE': Enter the date-type S/O Ship To Address UDF that will hold the DEA license expiration date.

S/O SHIP TO ADDRESS UDF FOR 'SALUD LICENSE #': Enter the S/O Ship To Address UDF that will hold the SALUD license number.

S/O SHIP TO ADDRESS UDF FOR 'SALUD LICENSE EXPIRATION DATE': Enter the date-type S/O Ship To Address UDF that will hold the SALUD license expiration date.

S/O SHIP TO ADDRESS UDF FOR 'ASSMCA LICENSE #': Enter the S/O Ship To Address UDF that will hold the ASSMCA license number.

S/O SHIP TO ADDRESS UDF FOR 'ASSMCA LICENSE EXPIRATION DATE': Enter the date-type S/O Ship To Address UDF that will hold the ASSMCA license expiration date.

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

Section D: System Operations

Ship To Code Maintenance

Each customer who will be shipped controlled substances will need to have at least one Ship To Code on file. Within a Ship To Code you will define the license number for the appropriate governing authority and its expiration date in the Setup specified UDFs.

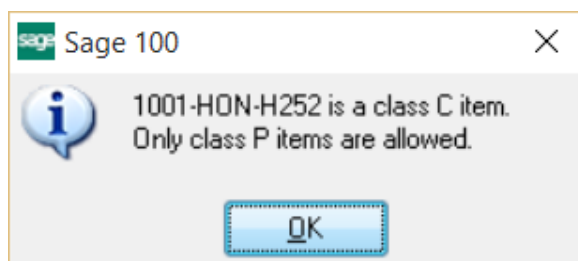
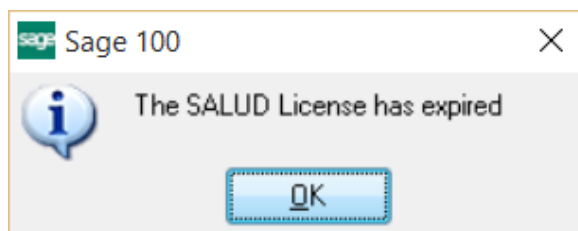
Inventory Maintenance

Each inventory item which is regulated by one of the governing agencies will need to have the setup specified value for that agency in the item category noted in Setup. An item can only belong to one License Class, but items can be governed by multiple agencies.

Sales Order Entry

All orders will need to contain a value in the license class UDF. During line entry, the Item Category for an inventory line must match the license class on the header.

When entering an item number or accepting the order, the enhancement checks the Ship To Code UDFs for the license numbers and expiration dates of every license type that regulates the license class specified on the order header. All licenses that regulate the header's license class must be nonblank and all expiration dates for those licenses must equal or exceed the Sales Order Date. If a blank license number or expired license date is encountered, or if there are items on the order whose Item Category is blank or does not contain the appropriate license class value to match the sales order header, the system will produce a failure notice (screenshots below are examples of two of the possible failure notices). The sales order cannot be accepted until all instances are corrected.

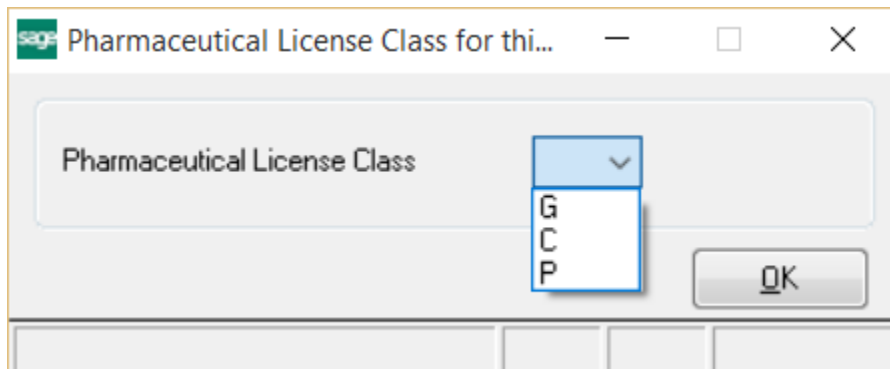


S/O Invoice Data Entry

Invoices in Invoice Data Entry must meet the same criteria using the S/O Invoice Header UDF for License Class. The Invoice Date is compared to the license expiration date instead of the Order Date.

Batch Processing

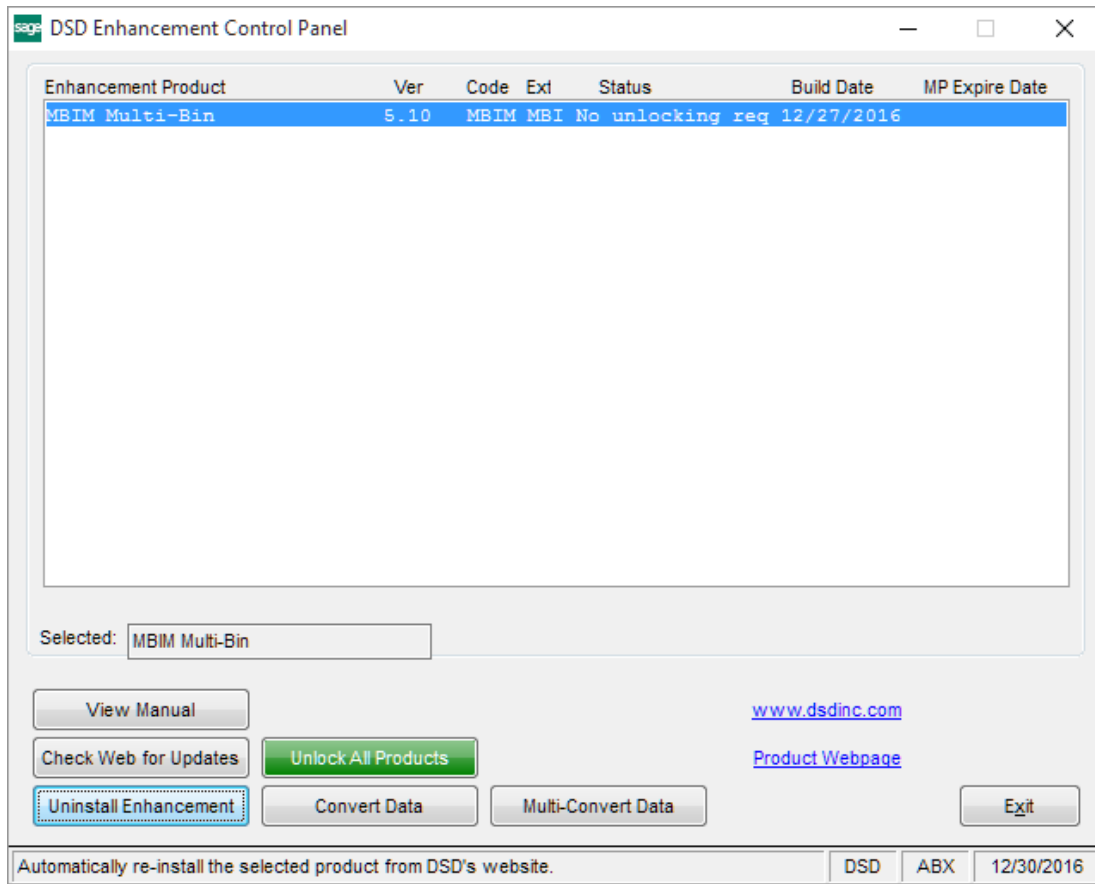
If you use batch processing, you must specify a license class for the entire batch. After selecting a batch, you will receive a pop-up prompt to pick a license class (Figure 4). Once you pick a license class for the batch you cannot change it, and you cannot merge this batch with other batches that have different license classes. All invoices in the batch must have the same license class in their SO Invoice Header UDF as the batch.



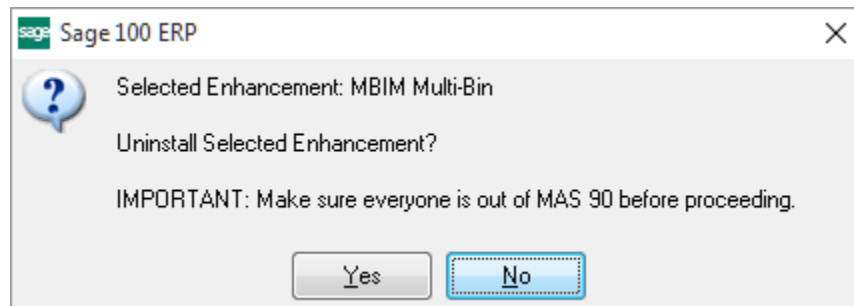
NOTE: Auto Generate Invoices is not supported.

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.

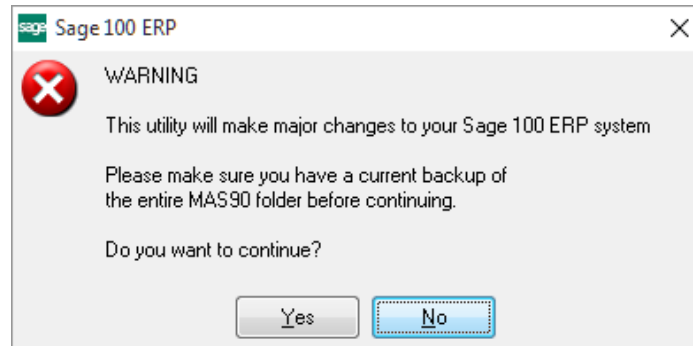


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



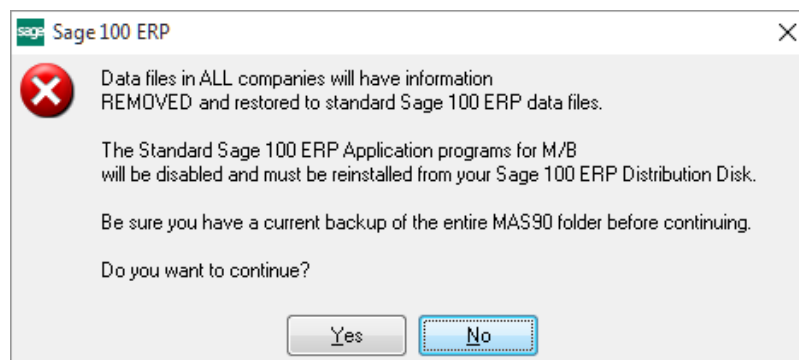
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

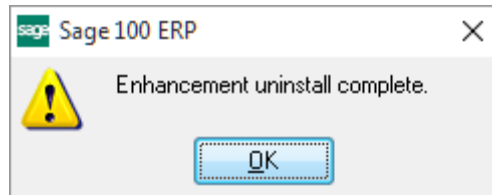
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).