



DSD Business Systems

Sage 100 Enhancements

SODM

Sales Order InstaDocs

Version 7.40



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S/O InstaDocs 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*

SODM S/O InstaDocs:

<http://www.dsdinc.com/enh/pages/SODM.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 with Symantec PCAnywhere or by some other means access or duplicate the system.

S/O InstaDocs Features

Sales Order InstaDocs allows electronic documents to be stored, viewed and accessed within Sage 100 ERP. It is the first and only document management solution to be embedded within Sage 100 ERP. This unique electronic document storage solution provides easy access of documents relating to specific records.

The Documents Panel is embedded into various Sage 100 ERP Maintenance, Inquiry, and Data Entry programs. As each record is accessed, the documents that correspond to that record are displayed. The user has the ability to drag and drop documents, select documents to edit, and tag documents with unlimited keywords. Users can then search all stored documents based on those specific keywords.

Master Search allows users to search all documents based on File Name, Keywords, and Document Source.

Sales Orders, Packing Lists, and S/O Invoices can be automatically stored in PDF format within the appropriate **Customer** directory.

With **InstaDocs** Role Security enabled, you can define which users/roles can View, Open, Email, Delete, and Drag and Drop documents within the **InstaDocs** Documents Panel.

With **InstaDocs**, all documents are at your fingertips!

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 | 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.

- 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.

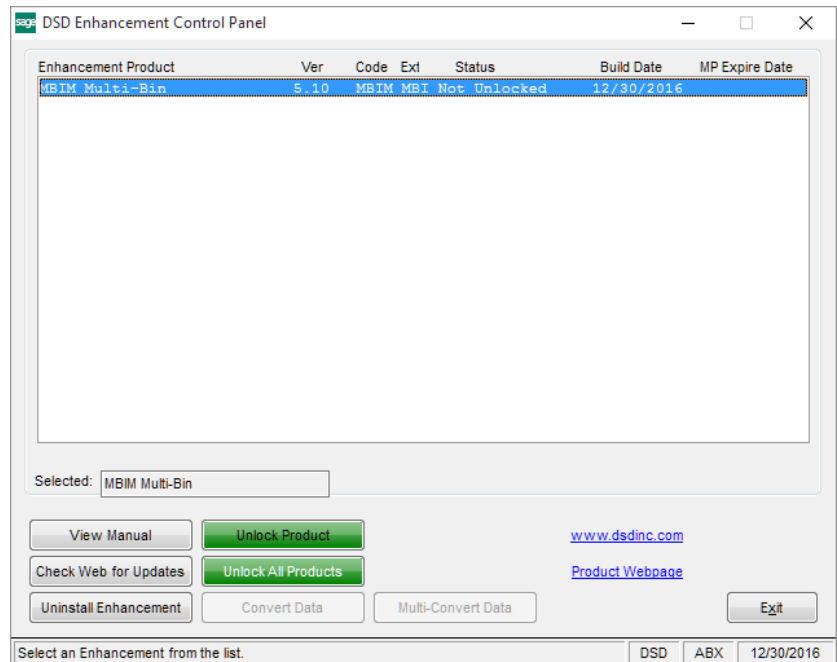
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct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

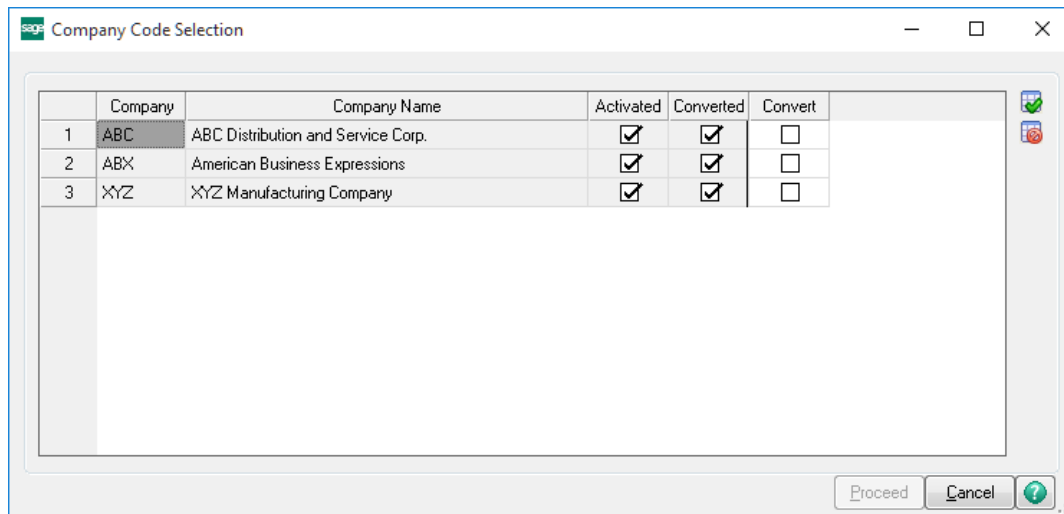
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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

Compatibility

InstaDocs is not compatible with Windows O/S versions 2003 (server) or XP. Windows Vista or higher is required.

InstaDocs Workstation Setup – Sage 100 Advanced and Premium Versions Only

The DLL Components required for each workstation will be copied automatically from the server on the initial load of an InstaDocs screen, and the necessary Window's registration performed. Should this process fail, for Window's security reasons or otherwise, a DLL registration error will result, requiring this process to be performed manually. To perform this process manually, do the following:

1. Copy the DSDDocuments.dll and REGDM.BAT files from the ..\MAS90\Home directory on the server, to the directory of the same name on the workstation.
2. Open a Command Prompt as Administrator.
3. Change the current directory to the workstation's MAS90\Home location.
4. Enter: REGDM.BAT

InstaDocs Setup Options

NOTE: *Prior to setup of S/O InstaDocs, it is recommended that you first setup A/R InstaDocs.*

InstaDocs Setup Options has been added as a menu item on the Sales Order Setup menu.

On the Main Tab, the following fields are available:

S/O InstaDocs Setup Options (ABC) 8/21/2025

1. Main 2. Tags

Enable Security ☐

Paperless Sales Order Printing Update To Customer ☒

Naming Convention For Sales Order Document "SalesOrder_" + Customer Number + "_" + Sales Order Number

Paperless S/O Packing List Printing Update to Customer ☒

Naming Convention For Packing List Document "PackingList_" + Customer Number + "_" + Sales Order Number

Paperless S/O Invoice Printing Update to Customer ☒

Naming Convention For Sales Order Invoice Document "Invoice_" + Customer Number + "_" + Invoice Number

Paperless S/O Picking Sheet Printing Update to Customer ☒

Naming Convention for Picking Sheet Document "PickingSheet_" + Customer Number + "_" + Sales Order Number

Default View Details

Enable Sales Order Entry Document Tab ☒

Enable Invoice Entry Document Tab ☒

Enable Shipping Entry Document Tab ☒

Auto-Tag Sales Order documents with Invoice/Shipping No ☒

Auto-Tag Invoice/Shipping documents with Sales Order No ☒

Include Item Documents in Emails ☒

Include Lot/Serial Documents in Emails ☒

Auto Create PDF Prompt

Generate One Email per Customer Invoice Batch ☐

Accept Cancel

Enable Security: Selecting this checkbox turns on the Module Security Options in Role Maintenance. Please refer to the **InstaDocs Security** section in this User Manual.

Paperless Sales Order Printing Update to Customer: Selecting this checkbox turns on the Paperless Sales Order Printing feature.

Naming Convention for Sales Order Document: With the **Paperless Sales Order Printing Update to Customer** feature turned on, the naming convention of the Sales Order document can be defined, and is used when automatically printing to PDF and saving into the Customer's document directory. There are four options to choose from:

- Sales Order Number
- Customer Number + “_” + Sales Order Number
- “Sales Order_” + Sales Order Number
- “Sales Order_” + Customer Number + “_” + Sales Order Number
- “Sales Order_” + Sales Order Number + “_” + Form Code

Paperless Packing List Printing Update to Customer: Selecting this checkbox turns on the Paperless Packing List Printing feature.

Naming Convention for Packing List Document: With the **Paperless Packing List Printing Update to Customer** feature turned on, the naming convention of the Packing List document can be defined, and is used when automatically printing to PDF and saving into the Customer's document directory. There are four options to choose from:

- “Packing List_” + Sales Order Number
- “Packing List_” + Customer Number + “_” + Sales Order Number

Paperless S/O Invoice Printing Update to Customer: Selecting this checkbox turns on the Paperless S/O Invoice Printing feature.

Naming Convention for Sales Order Invoice Document: With the **Paperless S/O Invoice Printing Update to Customer** feature turned on, the naming convention of the S/O Invoice document can be defined, and is used when automatically printing to PDF and saving into the Customer's document directory. There are four options to choose from:

- Invoice Number
- Customer Number + “_” + Invoice Number
- “Invoice_” + Invoice Number
- “Invoice_” + Customer Number + “_” + Invoice Number

Default View: Select the default “View” for the **InstaDocs** Document Directory display in the various Maintenance, Data Entry, and Inquiry programs. The following options are available:

- Details – similar to Microsoft Explorer Details View
- Small Icon
- Medium Icon

- Large Icon
- Extra Large – great for .jpg or .bmp
- Tile

These “views” are similar to the directory view that can be seen in Microsoft Explorer. The option of changing from the default display is available in the Maintenance, Data Entry, and Inquiry programs. It is recommended that you try the different views in Customer Maintenance, and then set your preferred view in *InstaDocs* Setup Options.

Enable Sales Order Entry Document Tab: Select this checkbox to enable the *InstaDocs* Panel in S/O Sales Order Entry.

Enable Invoice Entry Document Tab: Select this checkbox to enable the *InstaDocs* Panel in S/O Invoice Entry.

Enable Shipping Entry Document Tab: Select this checkbox to enable the *InstaDocs* Panel in S/O Shipping Data Entry.

Auto-Tag Sales Order documents with Invoice/Shipping No: Select this checkbox to enable documents that are tagged in Invoice/Shipping Data Entry to ALSO be tagged with the Sales Order Number. The end-result is that the documents that are displayed on the Invoice/Shipping Data Entry *InstaDocs* Tab for as Invoice will also be displayed in Sales Order Entry for the Order that is invoiced.

Auto-Tag Invoice/Shipping documents with Sales Order No: Select this checkbox to enable documents that are tagged in Sales Order Entry to ALSO be tagged with the S/O Invoice Number during Invoice/Shipping Data Entry. The end-result is that the documents that are displayed on the Sales Order Entry *InstaDocs* Tab for a Sales Order will also be displayed in Invoice/Shipping Data Entry.

Include Item Documents in Email: Select this checkbox to enable documents for Item Numbers (if IMDM Inventory InstaDocs is installed) on Sales Order / SO Invoices to be included in Paperless Electronic Delivery. A Reserve Word can be optionally used to choose which Item Documents are included.

Include Lot/Serial Documents in Email: Select this checkbox to enable documents for Lot/Serial Numbers (if CIDM Lot/Serial InstaDocs is installed) on Sales Order / SO Invoices to be included in Paperless Electronic Delivery. A Reserve Word can be optionally used to choose which Lot/Serial Documents are included.

Generate One Email per Customer Invoice Batch: Check this box to generate one email per customer in Sales Order Invoice printing for paperless office. An additional checkbox (One Email per Invoice Batch) has been added to customer maintenance and must be enable per customer for this feature. Invoice History Printing will also generate one email per customer.

On the Tags Tab, the ability to create “Template Tags” is available, which can be used when tagging documents. Template Tags are Terms or phrases that are commonly used for documents and can relate to different stages in workflow.


The screenshot shows the 'S/O InstaDocs Setup Options' window with the '2. Tags' tab selected. The window has a title bar with the text 'S/O InstaDocs Setup Options (ABC) 8/26/2025'. Below the title bar are two tabs: '1. Main' and '2. Tags'. The '2. Tags' tab is active. Inside the tab, there is a section 'Enable Tagging of Documents' with a checked checkbox. Below this is a table with the following content:

| Template Tag |
|-----------------------|
| CUSTOMER PO |
| EMAILS |
| SHIPPING INSTRUCTIONS |

To the right of the table is a button with a red 'X' icon. Below the table is a section 'Select Documents to Include on Paperless Delivery' with two rows of checkboxes and text labels:

| | | |
|---------------------------------|--------------------------|---------------------|
| Use Reserved Word Tag | <input type="checkbox"/> | Reserved Word |
| Use IMDM/CIDM Reserved Word Tag | <input type="checkbox"/> | IM/CI Reserved Word |

At the bottom of the window are three buttons: 'Accept', 'Cancel', and a help icon.

Enable Tagging of Documents: Select this checkbox to allow for tagging of documents. Tagging can be done by selecting one or more documents in the **InstaDocs** Tab in various Maintenance, Data Entry, and Inquiry programs, and then selecting the  button on the right of the **InstaDocs** Tab.

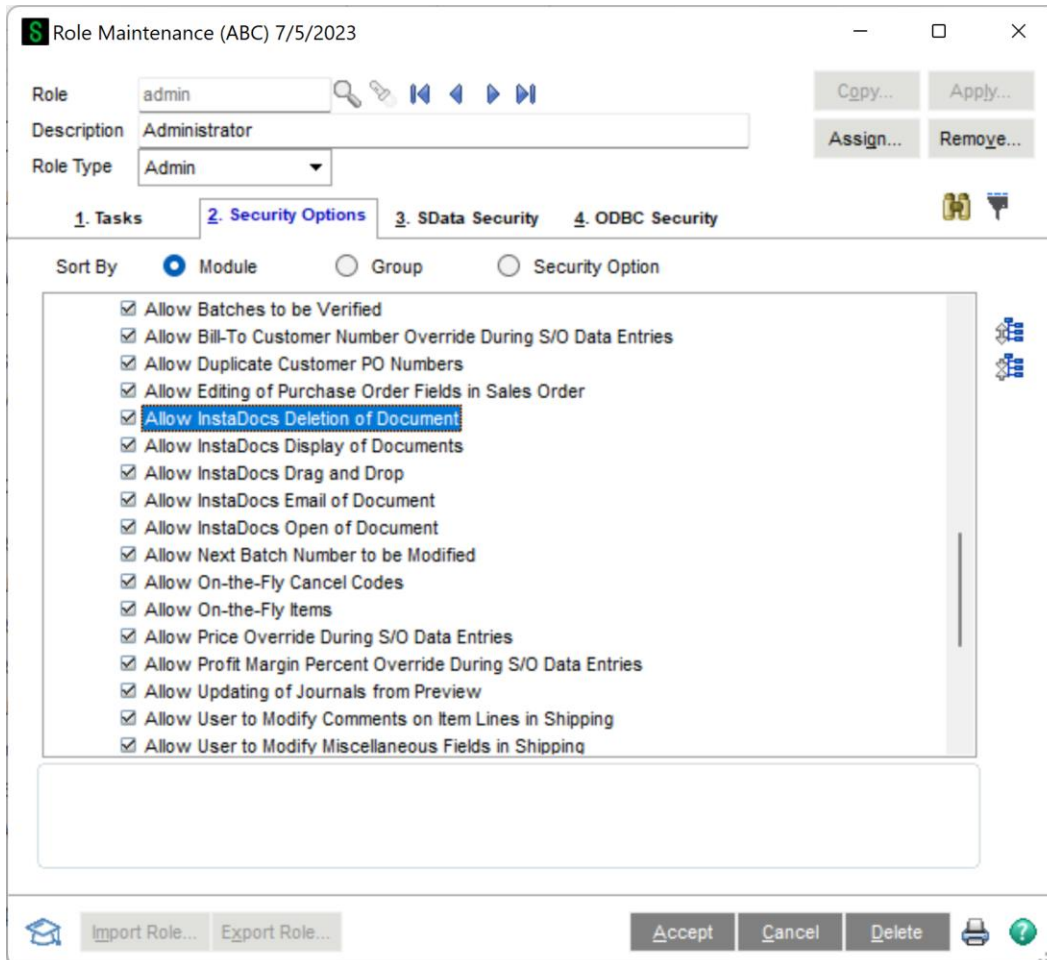
Use Reserved Word Tag: Check this box to use a reserved word. When enabled, this tag needs to be on documents that you want emailed to customers with the feature “Attach Tagged Documents to Email Deliveries”

Use IMDM/CIDM Reserved Word Tag: Check this box to use a reserved word when tagging Item or Lot/Serial Documents (see IMDM User Manual for more information). When enabled, this tag needs to be on documents that you want emailed to customers with the feature “Attach Tagged Documents to Email Deliveries”

If the **Enable Security?** checkbox is checked on the Main Tab, then the Enable/Disable Tagging of Documents can be set in **Role Maintenance**.

InstaDocs Security

InstaDocs Security can be maintained in Library Master / Main / **Role Maintenance**. Select the 3. Module Options panel to access the security options.



Allow InstaDocs Deletion of a Document: Allow/Disallow the deletion of a document from the InstaDocs Document Tab.

Allow InstaDocs Display of a Document: Enable/Disable the display of the InstaDocs Document Tab in the Maintenance, Data Entry, and Inquiry programs.

Allow InstaDocs Drag and Drop Allow/Disallow the drag and drop of a document into the InstaDocs Document Tab.

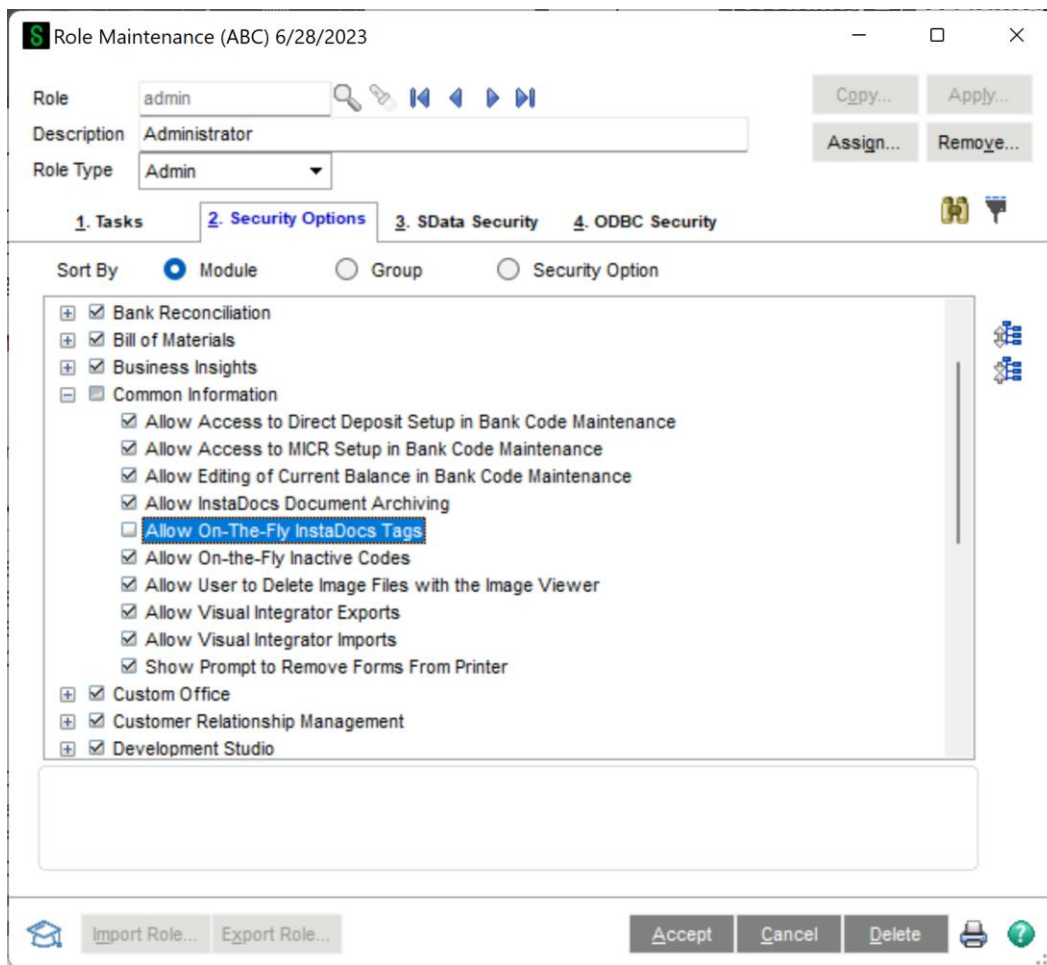
Allow InstaDocs Email of a Document: Allow/Disallow the email of a document from the InstaDocs Document Tab.

Allow InstaDocs Open of a Document: Allow/Disallow the open of a document from the InstaDocs Document Tab.

InstaDocs Security – Common Information

A new **Common Information Security Event** has been added:

Allow On-The-Fly InstaDocs Tags: Select this checkbox to allow the user to enter free-form Tags to documents. Clear this checkbox to disallow free-form Tags, and only allow Template Tags to be used when tagging documents.



Microsoft's One Drive™ integration

Microsoft's One Drive™ can be obtained on the One Drive website: <https://onedrive.live.com>.

After signup and purchase, be sure to download the install to enable One Drive™ on your network or workstation. After installation, you will have the ability to set the One Drive™ as your Default Path in InstaDocs Options.

The One Drive™ mobile device application is also available for download, which enables you to preview documents remotely.

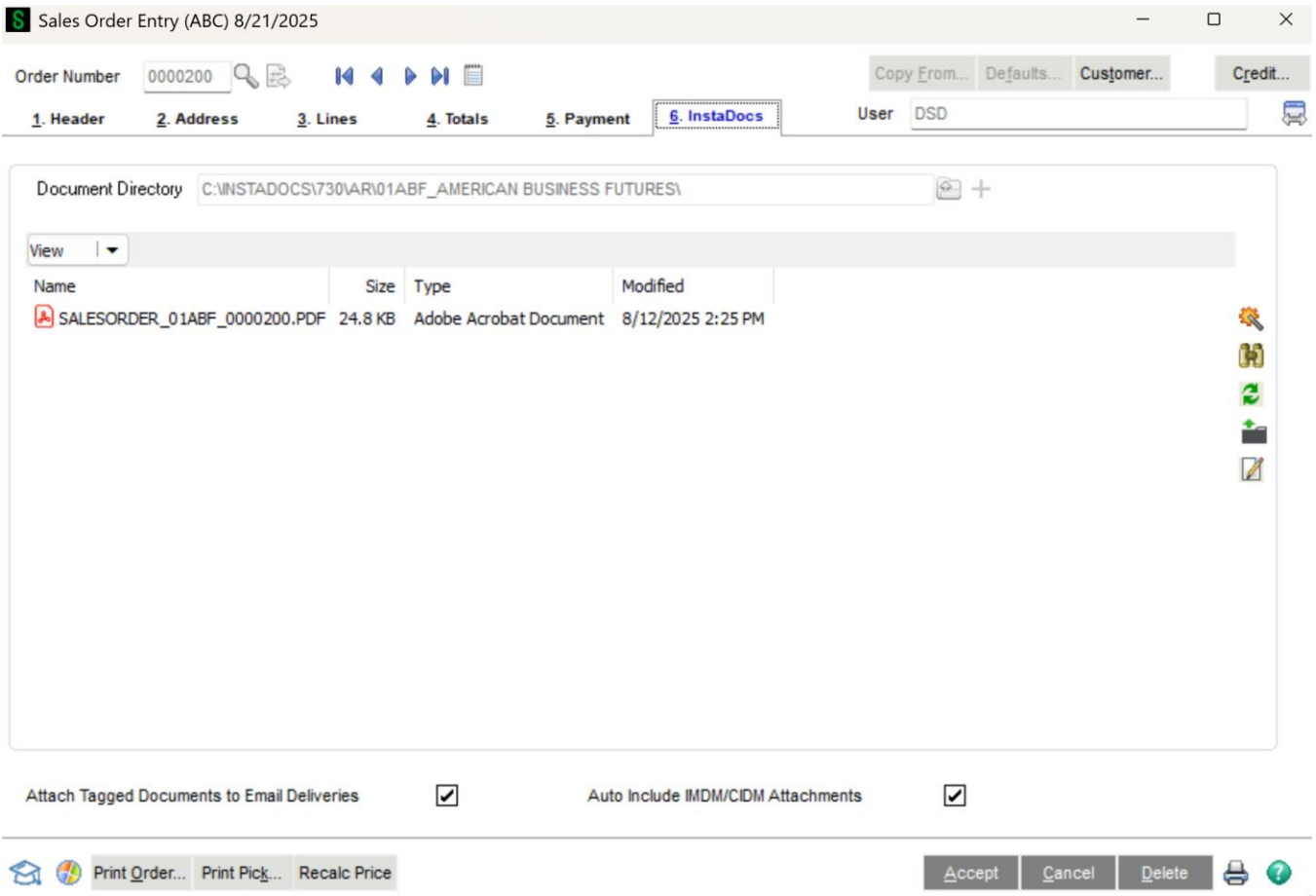
Section D: System Operations

Customer Maintenance

Please refer to the **ARDM Accounts Receivable InstaDocs User Manual** for explanation of the Customer Maintenance features.

Sales Order Entry

The **InstaDocs** Tab has been added to the S/O Sales Order Entry Panel.



Document Directory: This directory is based on the setting in Customer Maintenance. All documents that are Drag and Dropped or Pasted into this panel are saved into this Customer directory.

Attach Tagged Documents to Email Deliveries: Select this option to have Tagged Documents attached to email deliveries when electronically sending invoices through Paperless

Auto Include IMDM/CIDM Attachments When enabled, InstaDocs documents for items can be included in Electronic Delivery for Sales Orders and Invoices. The InstaDocs Options for Sales Order allows for enabling of this feature for documents related to both Items and Lot/Serial Numbers. Sales Order Entry and S/O Invoice Data Entry now have an option to include Item documents on the Electronic Delivery of that entry. Reserve Word Tags can be used to identify which Item Documents are included in the delivery.

The behavior of the panel is similar to those in Customer Maintenance, with these additions:

- Only those documents Drag and Dropped or Pasted into this panel are displayed on this panel.
- Files that are Drag and Dropped or Pasted into this panel are **Auto-Tagged** with the S/O Sales Order Number.

| | Tag | Source | Comment | User Created | Date/Time Created |
|---|---------------------------|--------------------|-----------------------------|--------------|------------------------|
| 1 | NEEDS MANAGEMENT APPROVAL | Vendor Maintenance | Needs Jon Reiter's approval | DSD | 06/28/2023 02:06:01 PM |
| 2 | | | | | |

All tags will have system-generated **User Created** and **Date/Time Created** fields added. The Date/Time is based on when the tag was created.

Comment: A comment may be entered for each tag. Once the Comment is added, and saved, it cannot be changed.

Invoice Data Entry and Shipping Entry

The **InstaDocs** Tab has been added to the S/O Invoice Data Entry, and Shipping Data Entry Panels.

S/O Invoice Data Entry (ABC) 8/21/2025

Invoice No. 0100069 Shipper ID 1 Defaults... Customer... Credit...

1. Header 2. Address 3. Lines 4. Totals 5. Payment 6. InstaDocs

Document Directory C:\INSTADOC\S1730\AR\01ABF_AMERICAN BUSINESS FUTURES\

| Name | Size | Type | Modified |
|---------------------------------|---------|------------------------|------------------|
| PACKINGLIST_01ABF_0100069IN.PDF | 26.0 KB | Adobe Acrobat Document | 8/6/2025 3:53 PM |

Attach Tagged Documents to Email Deliveries ☒ Auto Include IMDM/CIDM Attachments ☒

Quick Print... Accept Cancel Delete

Document Directory: This directory is based on the setting in Customer Maintenance. All documents that are Drag and Dropped or Pasted into this panel are saved into this Customer directory.

Attach Tagged Documents to Email Deliveries: Select this option to have Tagged Documents attached to email delivered when electronically sending invoices through Paperless Office.

Auto Include IMDM/CIDM Attachments When enabled, InstaDocs documents for items can be included in Electronic Delivery for Sales Orders and Invoices. The InstaDocs Options for Sales Order allows for enabling of this feature for documents related to both Items and Lot/Serial Numbers. Sales Order Entry and S/O Invoice Data Entry now have an option to include Item documents on the Electronic Delivery of that entry. Reserve Word Tags can be used to identify which Item Documents are included in the delivery.

The behavior of the panel is similar to those in Customer Maintenance, with these additions:

- Only those documents Drag and Dropped or Pasted into this panel are displayed on this panel.
- Files that are Drag and Dropped or Pasted into this panel are **Auto-Tagged** with the S/O Receipt/Return Number.

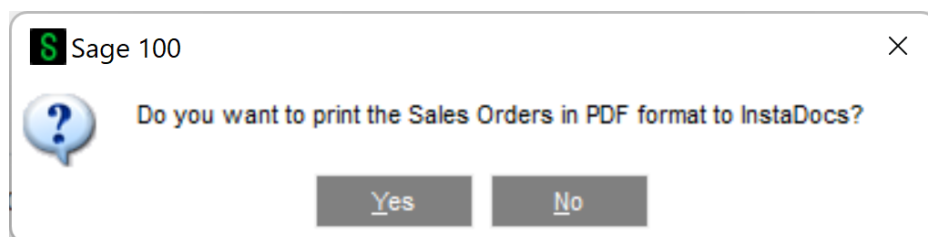
All tags will have system-generated **User Created** and **Date/Time Created** fields added. The Date/Time is based on when the tag was created.

Comment: A comment may be entered for each tag. Once the Comment is added, and saved, it cannot be changed.

If the **Enable Auto-Tag of Order number in Invoice/Shipping Entry** setting in **InstaDocs Setup Options** is selected, then documents that are tagged in Sales Order Entry will ALSO be tagged with the Invoice Number during Invoice/Shipping Data Entry. The end-result is that the documents that are displayed in the Sales Order Entry *InstaDocs* Tab for a Sales Order will also be displayed in Invoice/Shipping Data Entry.

Sales Order Printing

After Sales Orders are previewed or printed, the user will be prompted to print the Sales Orders in PDF format and saved into the Customer's directory.



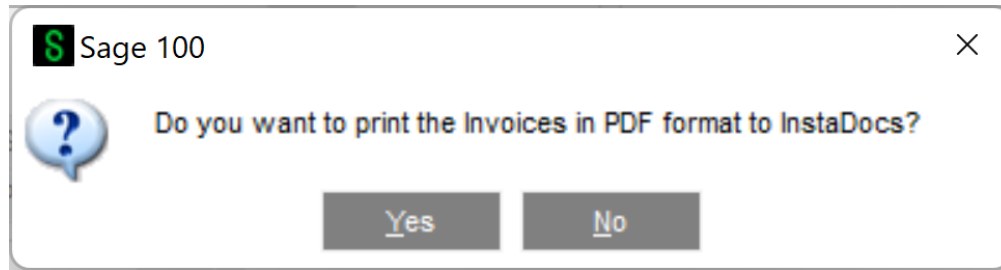
The PDF File Name will be based on the **Naming Convention for Sales Order Document** setting in **InstaDocs Setup Options**.

As the PDF is saved, the document is Auto-Tagged with the Sales Order Number.

Note: This feature is only available if the **Paperless Sales Order Printing Update to Customer** checkbox is selected in **InstaDocs Setup Options**.

S/O Invoice Printing

After S/O Invoices are previewed or printed, the user will be prompted to print the checks in PDF format and saved into the Customer's directory.



The PDF File Name will be based on the **Naming Convention for Sales Order Invoice Document** setting in **InstaDocs Setup Options**.

As the PDF is saved, the document is Auto-Tagged with the S/O Invoice Number.

Note: This feature is only available if the **Paperless S/O Invoice Printing Update to Customer** checkbox is selected in **InstaDocs Setup Options**.

Note: This feature is also available with Packing List Printing

InstaDocs SuperSearch

This Search Program has been added to the Sales Order Utilities menu, and has the same functionality as the Search Panel outlined in Customer Maintenance.

InstaDocs Document Migration Utility

The InstaDocs Document Migration Utility has been added to the Common Information / Utilities menu.



New Default Directory: Select the new directory to move all documents to.

Company Code: Select the Company Code for the migration.

Module Code: Select the InstaDocs module code to migrate, or select ALL to do all modules.

When the **Proceed** button is selected, the utility will scan all InstaDocs directories and do the following:

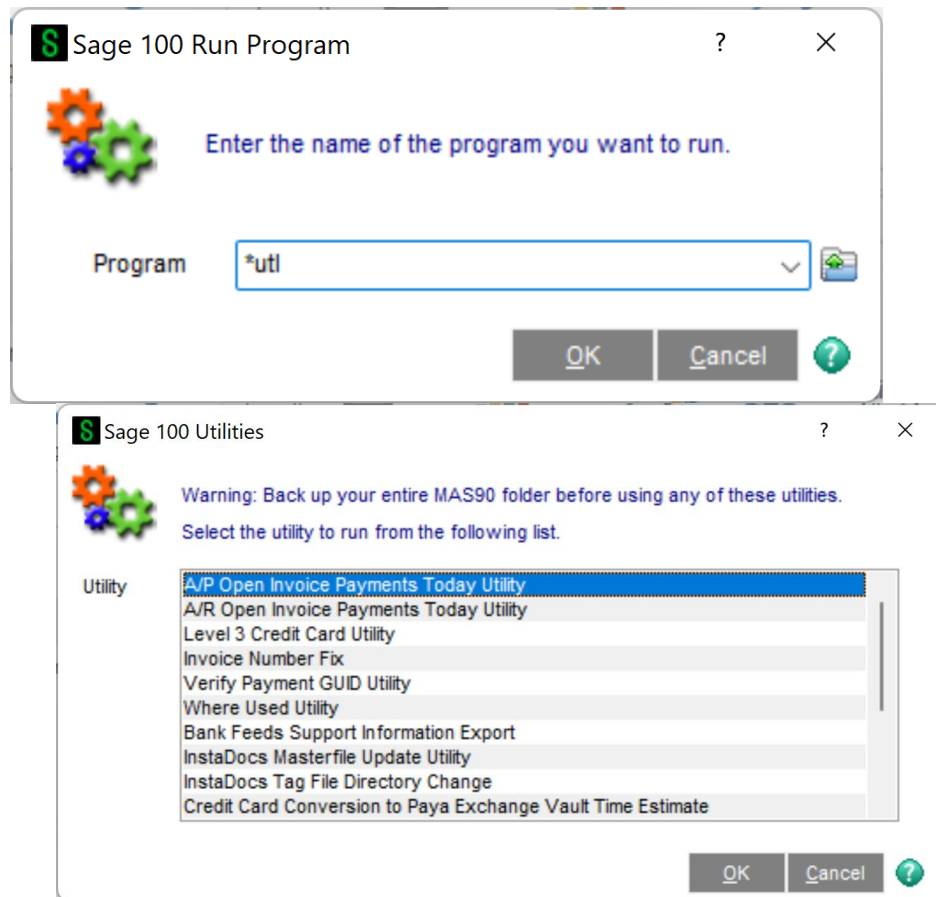
When the **Proceed** button is selected, the utility will scan all InstaDocs directories and do the following:

1. A Find/Replace process will be performed for the specified InstaDocs module, substituting the original Default Directory with the New Default Directory
2. All files in the original document directories will be moved to the new location as prefixed by the new Default directory.
 - a. A new directory will be created for those that don't already exist.
3. The InstaDocs Directory for each Masterfile record for the specified module will be updated with the new Default Directory
4. The InstaDocs Tag file will be updated for all tags that contain the original path.

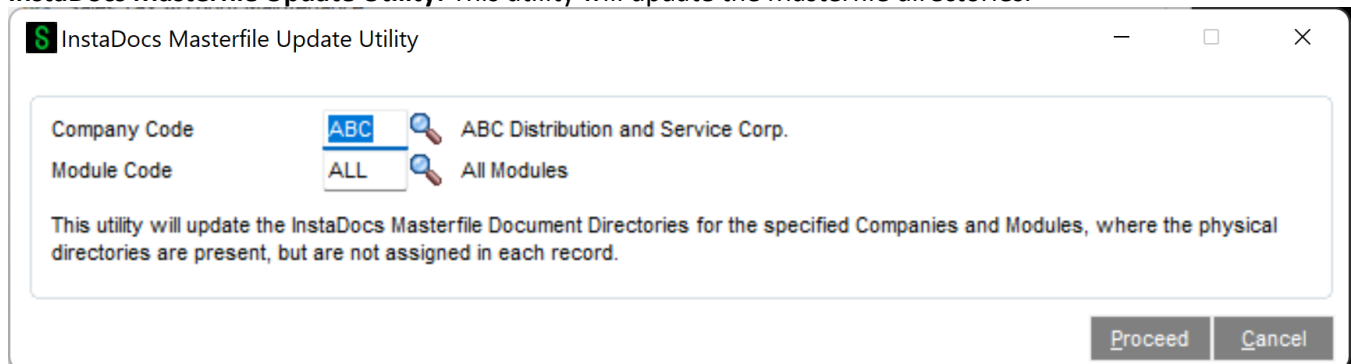
Utilities

Sage file > Run > *UTL

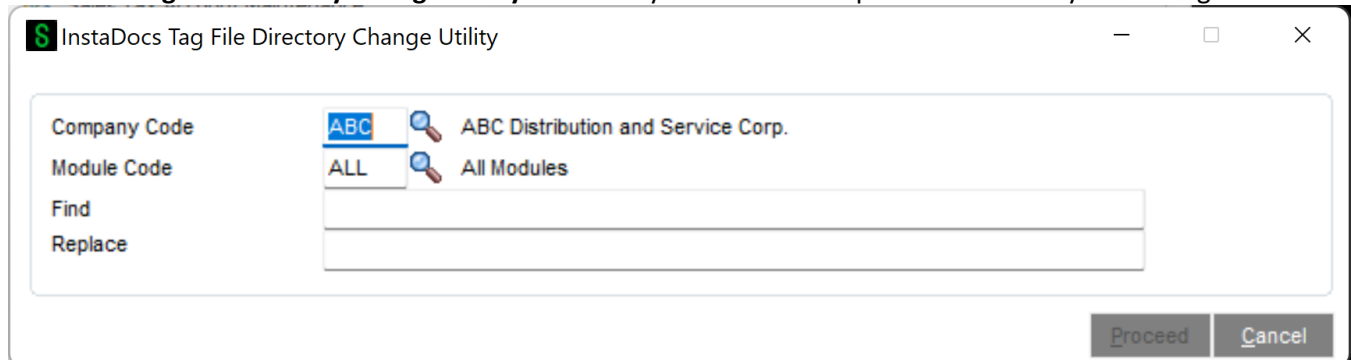
Here are the Panels when running:



InstaDocs Masterfile Update Utility: This utility will update the Masterfile directories.



InstaDocs Tag File Directory Change Utility: This utility will Find and Replace the directory for the tag file.



Two new security tasks have been added. “InstaDocs Tag File Directory Change” and “InstaDocs Masterfile Update Utility”

Role Maintenance (ABC) 7/5/2023

Role:

Description:

Role Type:

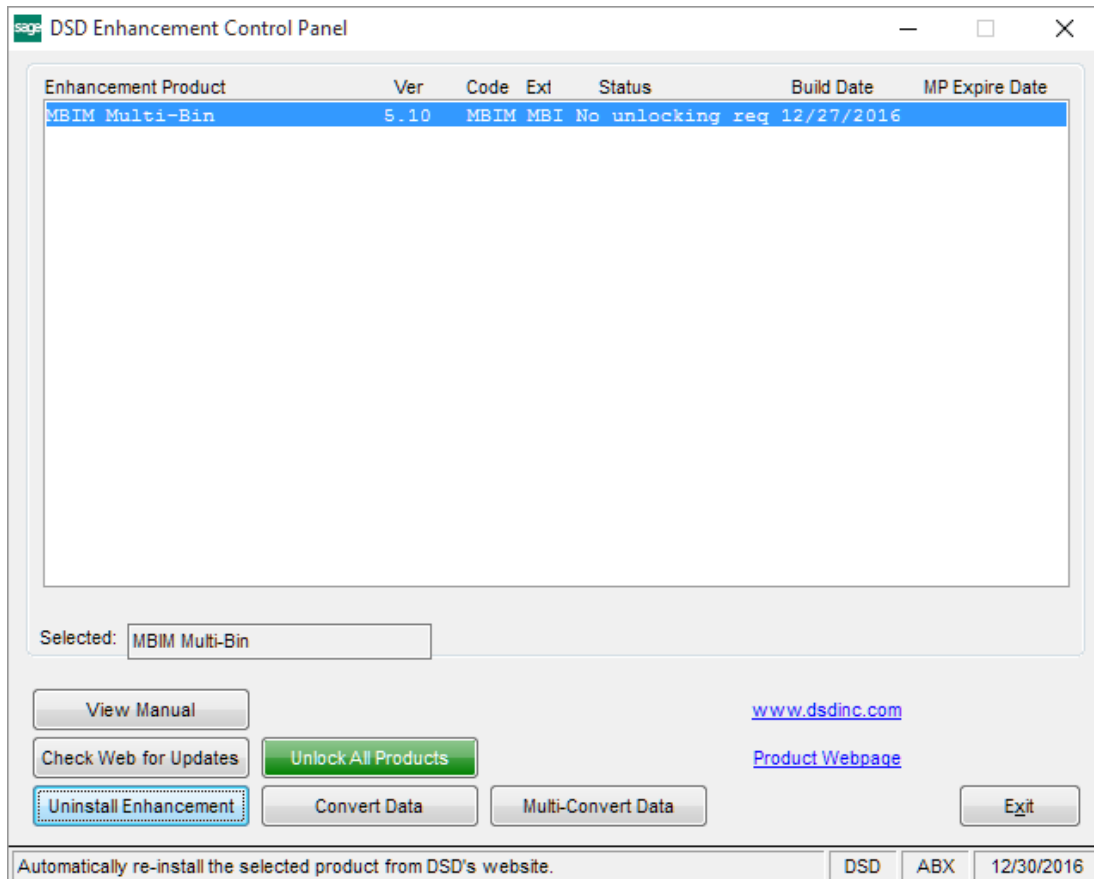
1. Tasks 2. Security Options 3. SData Security 4. ODBC Security

Sort By: ☒ Alphabetical ☐ Default Menu Order

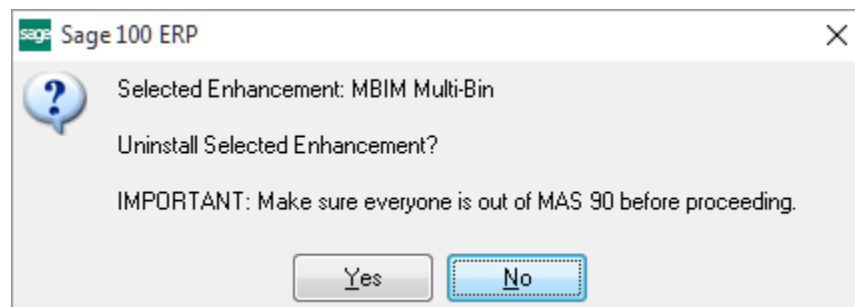
- ☒ Common Information
 - ☒ Main
 - ☒ Reports
 - ☒ Setup
 - ☒ Utilities
 - ☒ Purge Obsolete Extended Descriptions
 - ☒ Purge Item History
 - ☒ Recalculate Item History
 - ☒ Commodity Code Import
 - ☒ InstaDocs Document Migration Utility
 - ☒ Miscellaneous
 - ☒ C/I Setup Wizard
 - ☒ Cloud Connector Configuration Utility
 - ☒ Sage Payment Center - Info Center
 - ☒ **InstaDocs Tag File Directory Change**
 - ☒ InstaDocs Masterfile Update Utility
- ☒ Custom Office
- ☒ Customer Relationship Management
- ☒ Development Studio
- ☒ eBusiness Manager
- ☒ Fixed Assets

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.

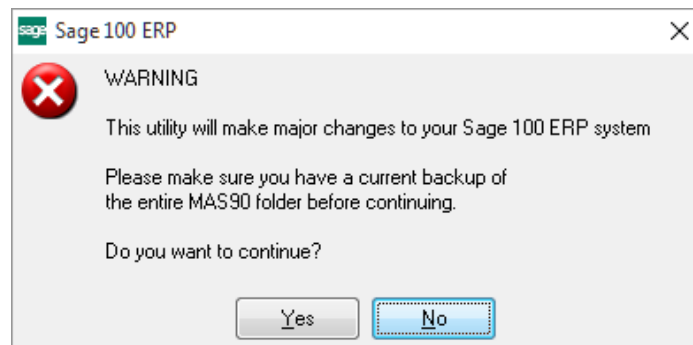


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



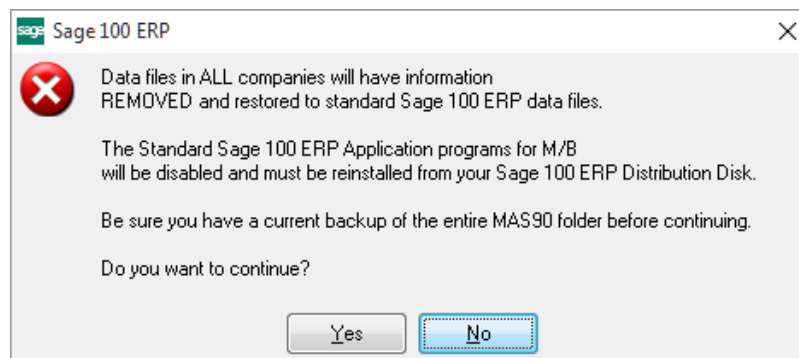
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

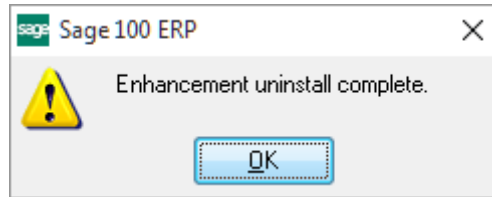
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).