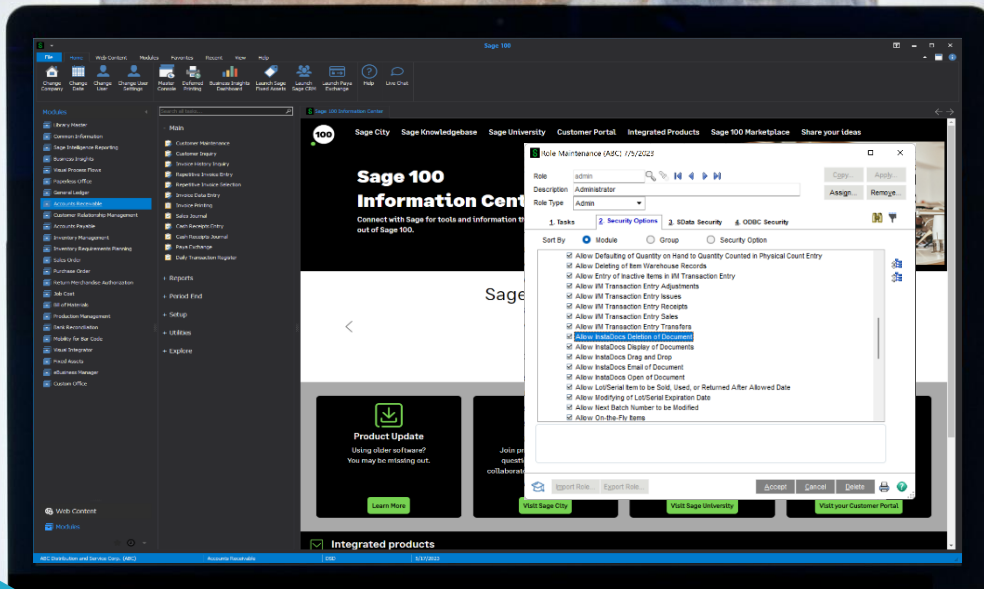


# Sage



**DSD** BUSINESS SYSTEMS

SAGE 100 ENHANCEMENTS

**CIDM**

**LOT/SERIAL INSTADOCS**

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## Lot/Serial InstaDocs

**Published Date: June 18, 2026**

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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.

### Lot/Serial InstaDocs Features

Lot/Serial 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 CIDM Lot/Serial InstaDocs is an extension to the IMDM Inventory InstaDocs, and allows for document management for Lot/Serial Items in the Inventory module. The Documents Panel is embedded into Lot Serial Number Distribution (all data entries), Item Maintenance and Inquiry.

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

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



**Important – Read this section prior to installing this enhancement.**

## Updated Modules

This enhancement modifies several Sage 100 modules. If you reinstall one of the Sage 100 modules listed in the following table, you must also reinstall this enhancement. **Enhancements from different Sage Tech Partners may not be designed to work together.**

Module	CIDM
<b>Common Information</b>	✓

If you are upgrading Sage 100 with a Product Update, check the DSD website for compatibility before upgrading. A new version of the enhancement may be required.

If you are upgrading Sage 100 to a new version (e.g., 2021 to 2023), you must obtain the latest compatible release from the DSD website prior to installing and converting.

Ensure the compatibility of all enhancements with the version being upgraded to prior to starting the installation process. Work with your reseller to ensure that enhancements are compatible with each other and note the proper order in which they should be installed.

## Installation

**Back-up:** Exit all Sage 100 sessions. Back-up existing Sage 100 data.


**Check Levels:** Sage 100 module levels must match those listed above.

**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.

**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.

**Re-Start Sage 100:** Sage 100 will be updated.

**Update Security:** After installation, you may not see the modules you installed on the Launcher menu. You will need to update all your security Roles to include access to the newly installed modules. Make sure your user has sufficient rights to modify Role Maintenance and add access to the new DSD enhancements to the appropriate Roles.

 If this is your first DSD enhancement, make sure to add the DSD Enhancement Control Panel in the Library Master module to an appropriate Role.

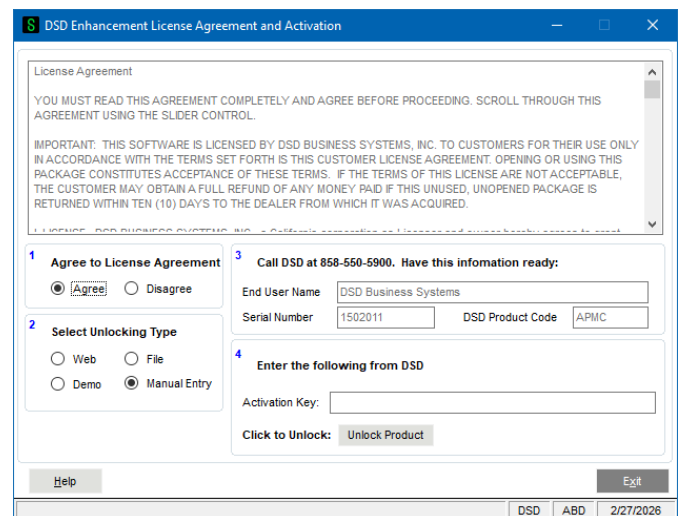
**Run the DSD Enhancement Control Panel:** Run the DSD Enhancement Control Panel from the Library Master module under the Utilities menu.

## 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.

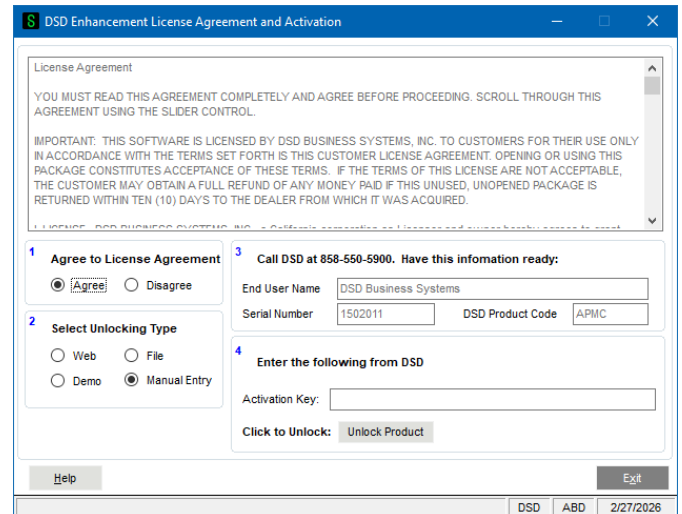
The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired 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. 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. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*




**Agree to the License Agreement:** On the DSD Enhancement License Agreement and Activation window, click on the Agree button to accept the DSD License Agreement. 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 licensing program will attempt to download encrypted serial number key file from DSD **and then proceed to unlock all enhancements contained in the file.**

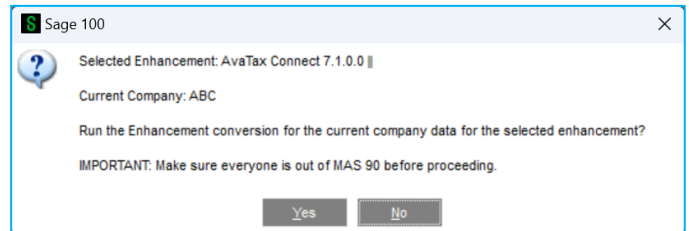
**Demo Unlock:** If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

 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.

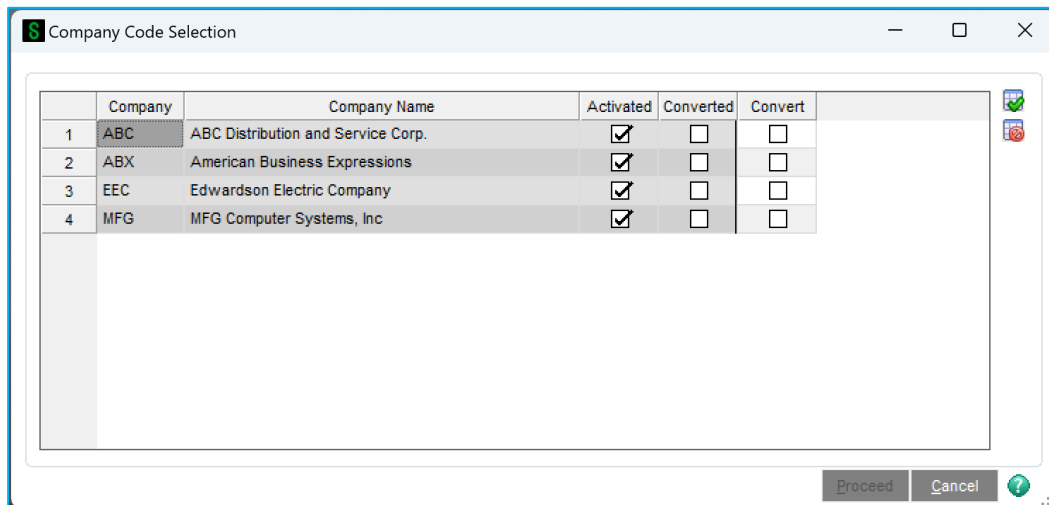
**Manual Entry Unlock:** If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

**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 Directory Permissions

The directories that store the InstaDocs files must have full permissions for all Users, including Local Admin user.

## 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:

#### For Sage 100 32-bit system installations (versions 2025 and below):

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. Type the following and press Enter: REGDM.BAT

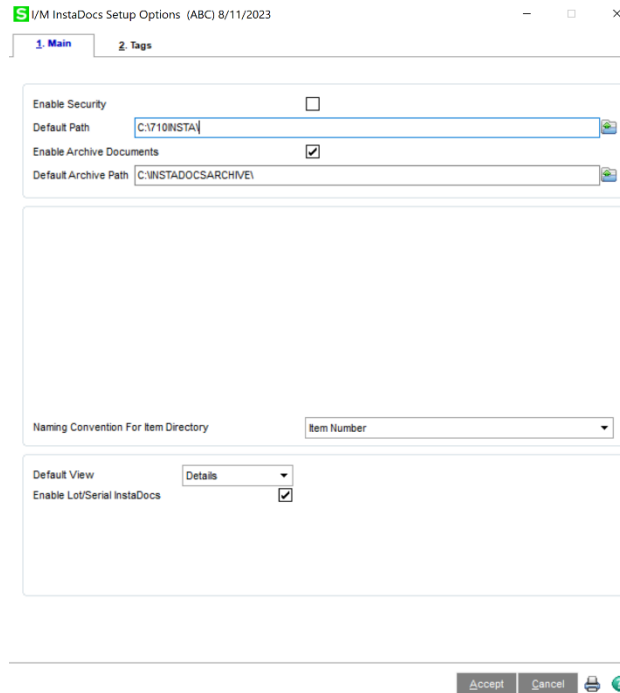
#### For Sage 100 64-bit system installations:

1. Copy the DSDDocuments64.dll and REGDM64.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. Type the following and press Enter: REGDM64.BAT

**NOTE that versions 2026 and above are always 64-bit.**

## InstaDocs Setup Options

I/M InstaDocs Setup Options has an “Enable Lot/Serial InstaDocs” Checkbox:



## InstaDocs Security

For **InstaDocs Security** please refer to Inventory InstaDocs (IMDM) user manual.

## 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

## Integration with IMDM Inventory InstaDocs

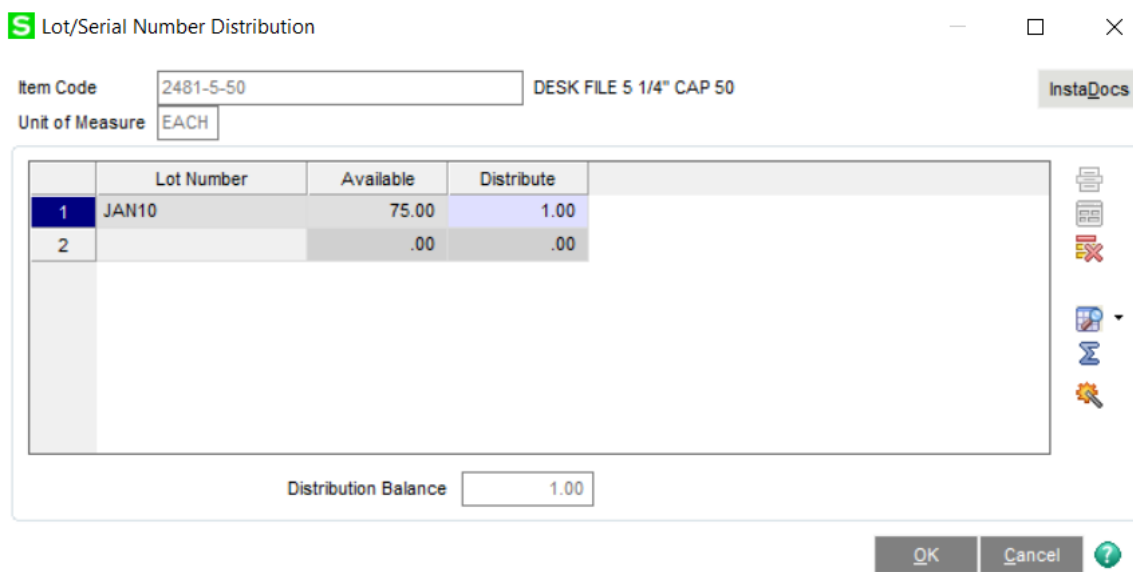
**Important:** All InstaDocs documents that are for Lot/Serial Numbers are saved into the Inventory InstaDocs document directory, and are tagged with the Lot/Serial Number. When a document is dragged/dropped or copy/pasted to the InstaDocs panel for Lot/Serial Number allocation, that document will appear in Inventory Item Maintenance / Inquiry.

## Lot/Serial Number Distribution


The changes to the Lot/Serial Distribution panel are visible to ALL Sage 100 modules that have Lot/Serial distribution. The InstaDocs “Magic Wand” button has been added to right side of the distribution grid on the Lot/Serial Distribution panel and will only be enabled when a Lot/Serial line is highlighted in the distribution panel.

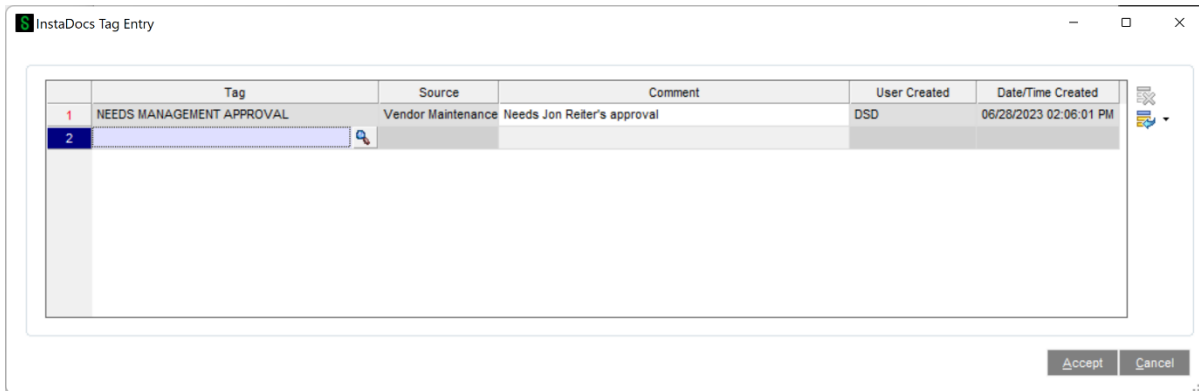
When this button is selected, a new InstaDocs Panel will be displayed, with all features that are available in other InstaDocs panels. All documents placed into this panel will be saved to the IMDM Item Document Directory for that Item Code, and auto-tagged with the Lot/Serial Number. The InstaDocs panel will display all documents in the Item Directory that have that Lot/Serial tag.

A new “InstaDocs” **button** will be added to TOP-RIGHT of the distribution panel on the Lot/Serial Distribution panel. When this button is selected, a InstaDocs Panel will be displayed. All documents placed into this InstaDocs panel will be saved to the IMDM Document Directory for that Item Code, and auto-tagged with **ALL LOT/SERIAL NUMBERS that are on the Distribution Grid.**



## Tagging a Document

On the right of the **InstaDocs Display Panel** is the  Tag button. A file, or multiple files, can be selected, and then the Tag Button can be pressed to display the **InstaDocs Tag Entry** panel:




- Single file tagging: When a single file is selected to tag, the **InstaDocs Tag Entry** panel will display all existing tags and will allow addition of new ones.
- Multiple file tagging: When multiple files are selected to tag, the **InstaDocs Tag Entry** panel will NOT display existing tags and will allow addition of new ones to be applied to all files selected.

Unlimited tags can be added, and existing tags can be deleted. Template Tags that are setup in **InstaDocs Options** can be accessed by selecting the Lookup Button, or any word or phrase may be entered as the tag. Tagging of a file allows for searching of files by tags that have been added to documents.

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.

## Searching for a Document

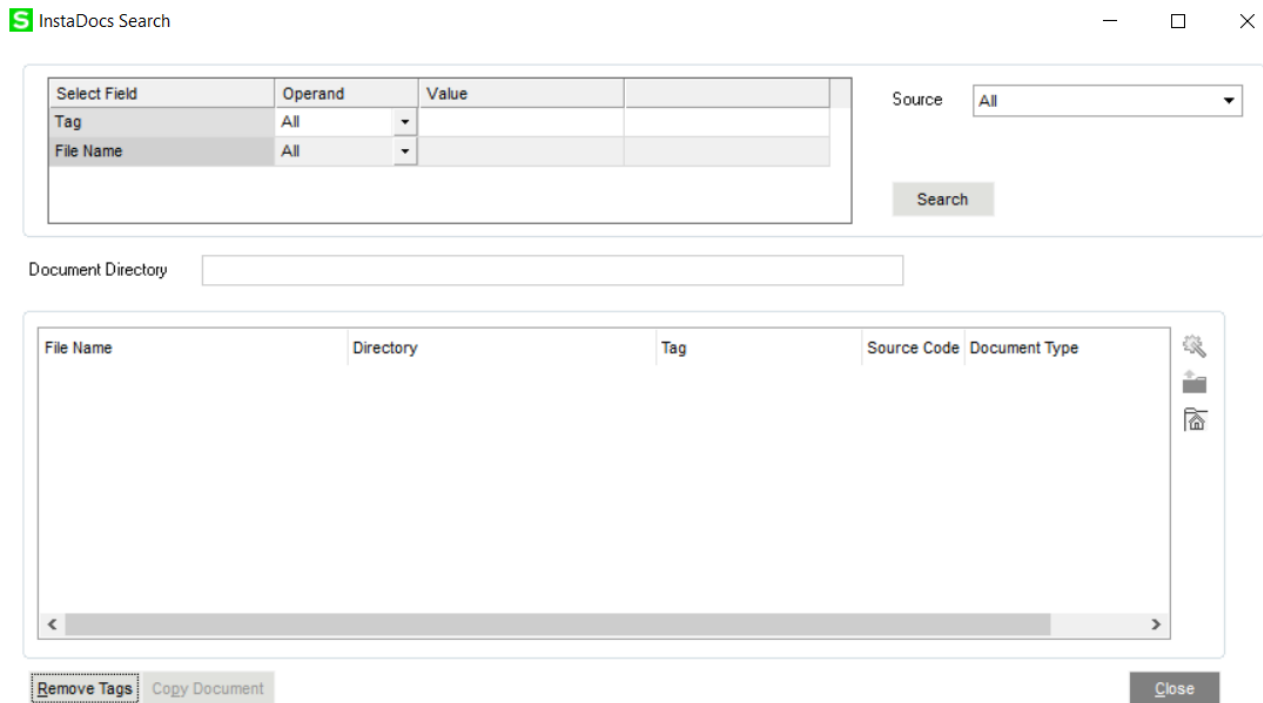
On the right of the **InstaDocs Display Panel** is the  Search button. Selecting this button will display the **InstaDocs Search Panel**.

**Selection Grid:** Select the Search Values for Tag and File Name.

**Source:** Narrow a search by selecting the Source of where the document was added into the **InstaDocs Display Panel**. This includes Item Maintenance, Invoice Entry, and Check Entry.

**Search All Directories:** Select this Checkbox to search in **all InstaDocs** directories for the tagged documents. UnCheck this Checkbox to only search in the specific Item's directory.

**Search Button:** After completing the search criteria, select the **Search** button to do the search.



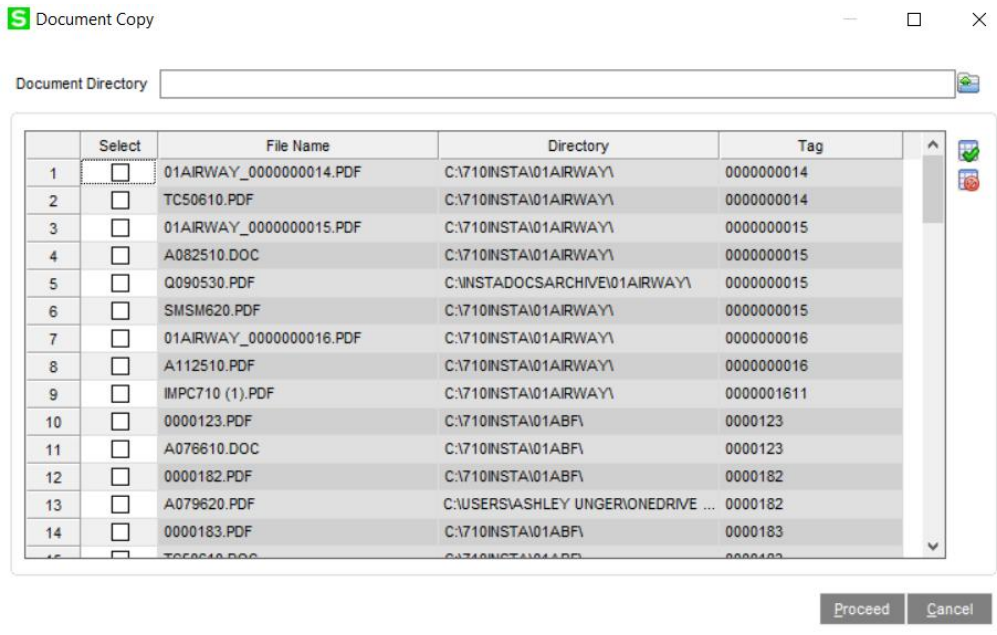
**Search Display Panel:** This panel will display the documents found in the search. The directory path is also displayed. Double-click on the row in the **Search Display Panel** to **open** the document.

**Tag Button:** Highlight a row, and then select the Tag button to review the tags for a specific document. The deletion of tags and addition of new ones is available.

**Open Button:** Highlight a row, and then select this button to open the document. Open a document by double-clicking the document in the **Search Display Panel**.

**Directory Button:** Highlight a row, and then select this button to open the directory of the file in a new panel.

**Copy Document:** This button will be enabled when the list box is populated after a Search is completed. When selected, a new Document Copy popup panel will be displayed.



**Directory to Copy to** – this field allows entry of a directory path to copy files to. A Lookup Button will allow for navigation to a directory.

**Selection Panel** – this panel will display all documents that were displayed in the Super Search results, with the following columns:

- **Select** – this column is a checkbox, and enabled for the user to Select/Clear which documents to copy
- **File Name** (disabled)
- **Directory** (disabled)
- **Tag** (disabled)


**Select All button** – selecting this button will check the Select checkbox for all entries.

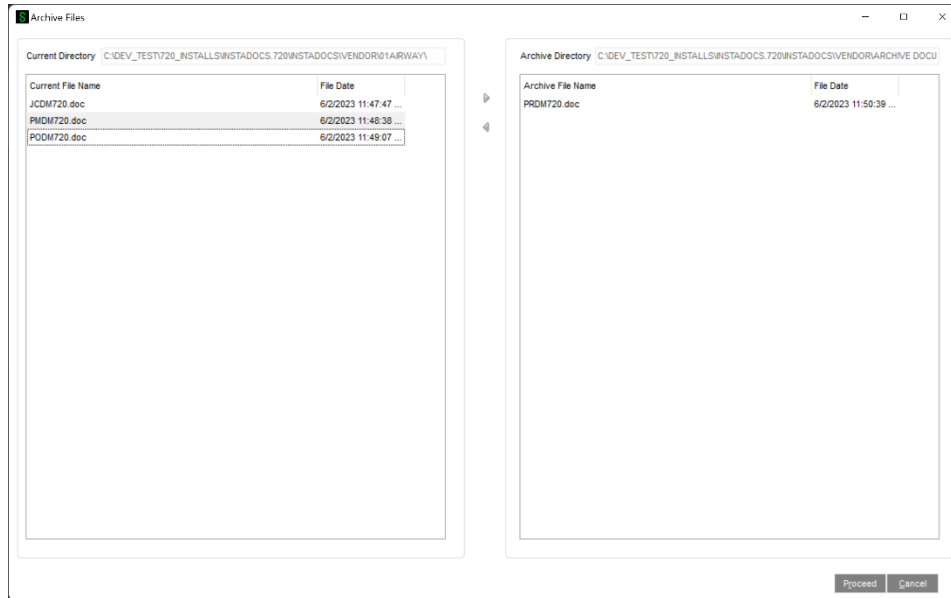
**Clear All button** – selecting this button will uncheck the Select checkbox for all entries.

**Cancel button** – this will cancel the process, and exit back to the Super Search panel.

**Proceed button** – when selected, the documents selected will be copied from the source directories to the “Directory to Copy To” directory. After the documents are copied, the user will be prompted “Copy Complete”, and the panel will be closed, and the user will be taken back to the Super Search panel.

## Archiving a Document

On the right of the **InstaDocs Display Panel** is the  Archive button. Selecting this button will display the **InstaDocs Archive Files Panel**.



**Current Directory:** The current directory section displays all documents in the current directory.

**Archive Directory:** The archive directory section displays all documents in the archive directory.

**Arrows:** Selection of a document or multiple documents can then be moved by using the arrows to move the document between directories. The Proceed button then confirms the document move. The cancel button will cancel any moves between directories. Document tags will also be updated when documents are moved between directories.

## InstaDocs SuperSearch

This Search Program has been added to the Inventory Management Utilities menu, and has the same functionality as the Search Panel outlined in Item 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:

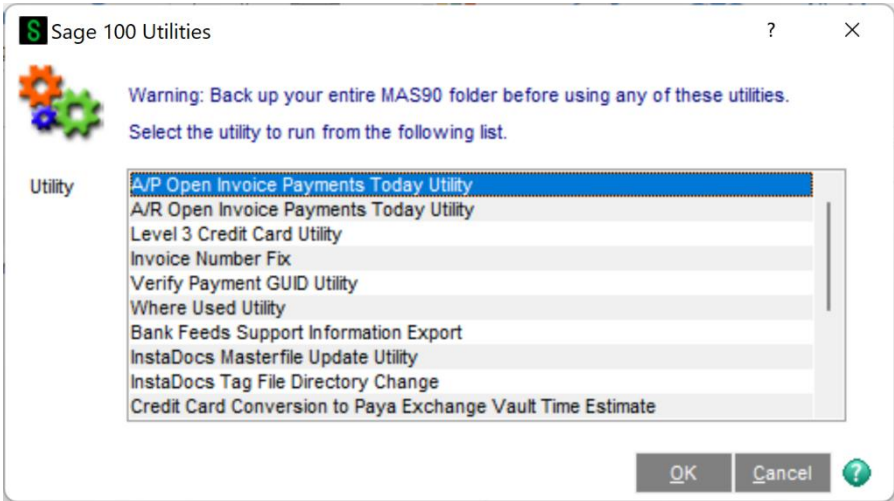
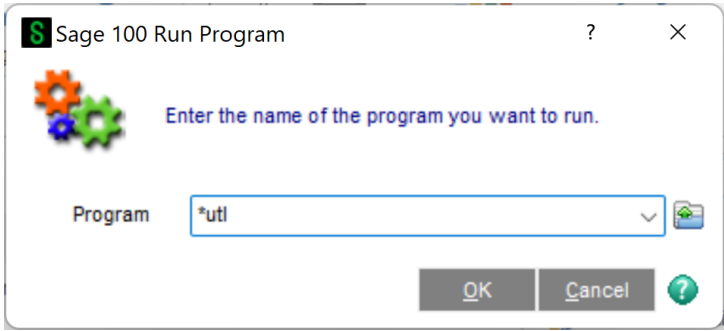
When the **Proceed** button is selected, the utility will scan all InstaDocs directories and do the following:

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.
3. A new directory will be created for those that don't already exist.
4. The InstaDocs Directory for each Masterfile record for the specified module will be updated with the new Default Directory
5. The InstaDocs Tag file will be updated for all tags that contain the original path.

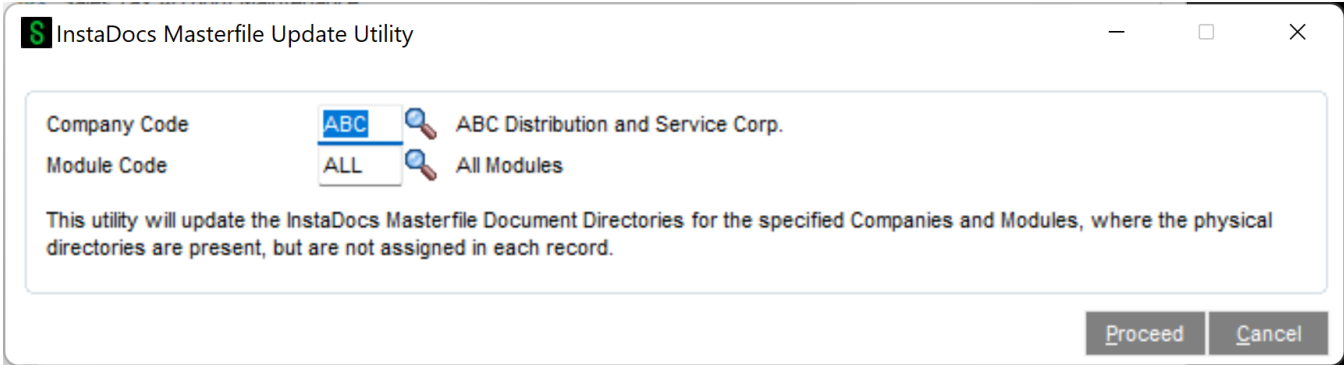
## Utilities

Sage file > Run > \*UTL

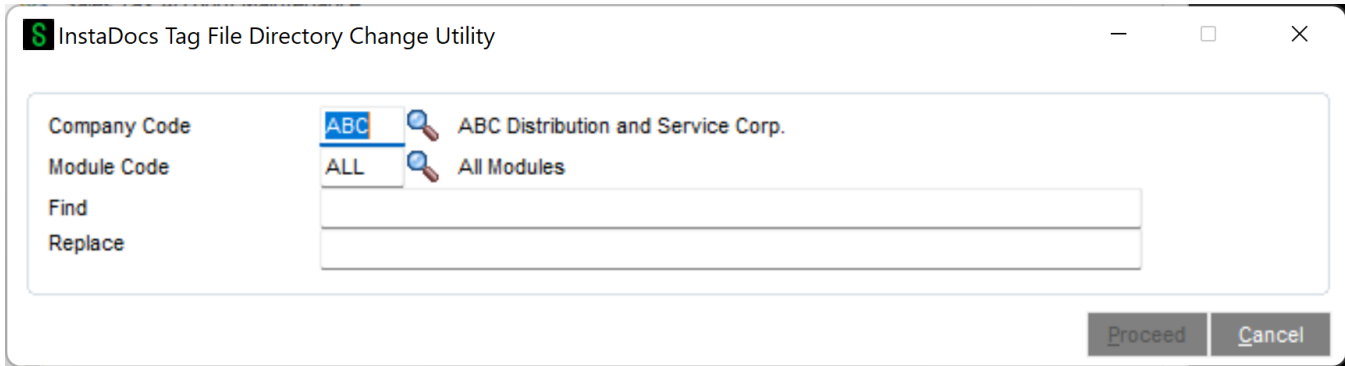
Here are the Panels when running:



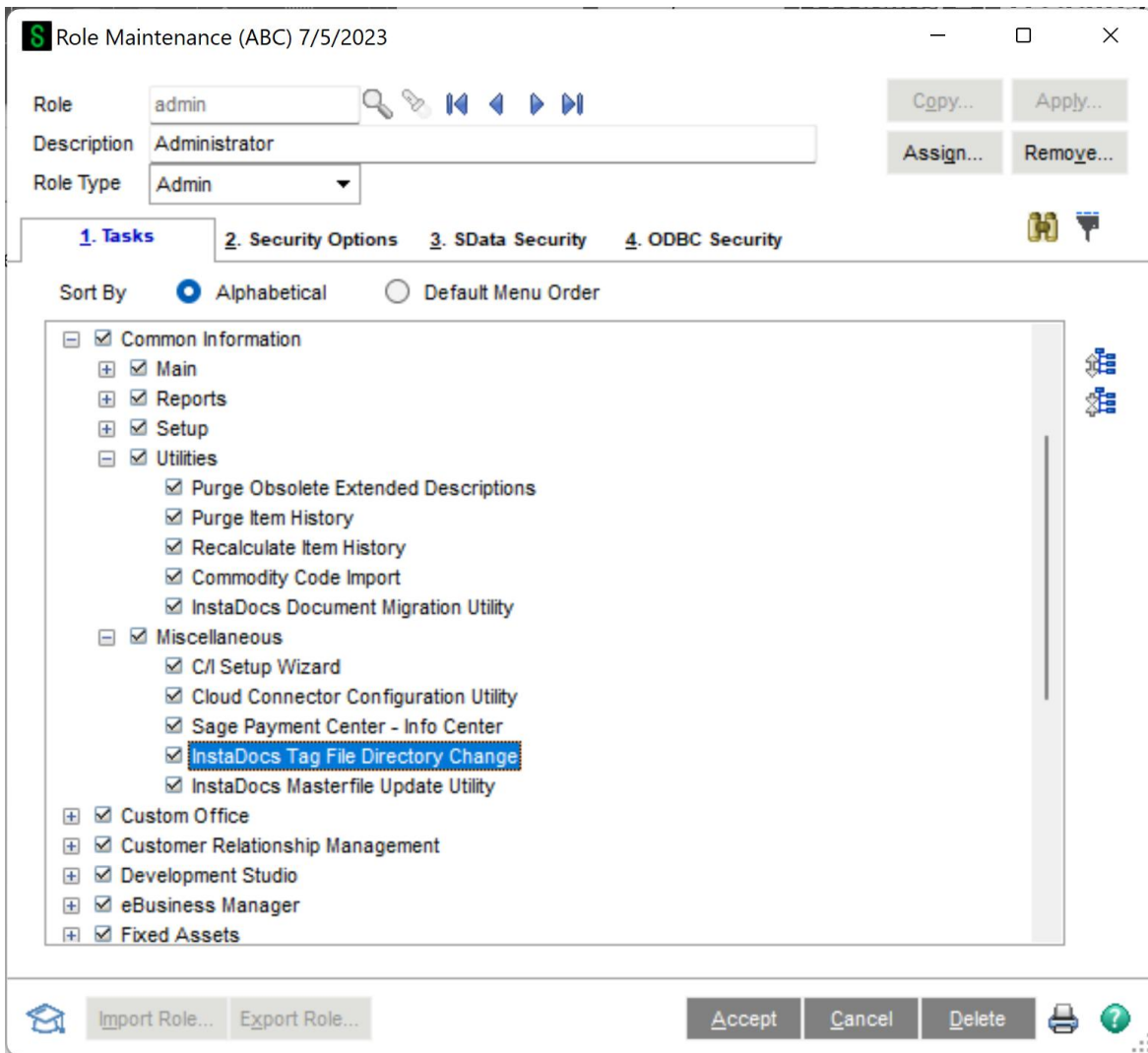
**InstaDocs Masterfile Update Utility:** This utility will update the Masterfile directories.



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

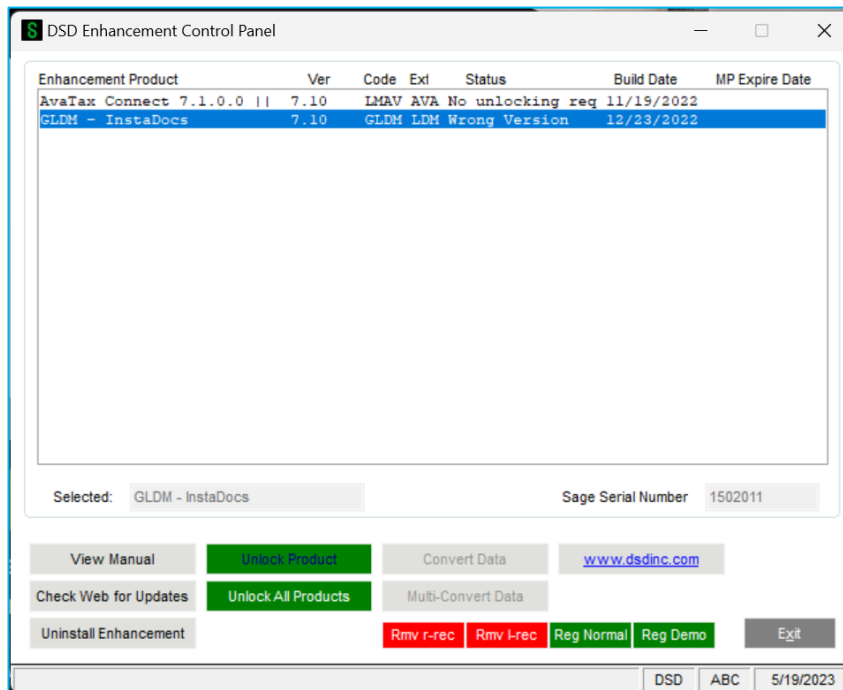


Two new security tasks have been added. “InstaDocs Tag File Directory Change” and “InstaDocs Masterfile Update Utility”



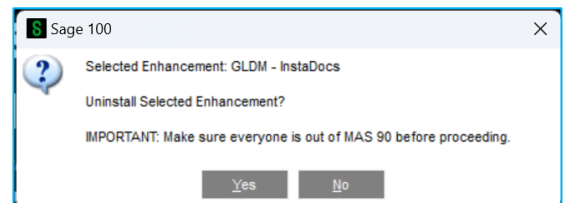
# Section E: Uninstall DSD Enhancements

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.



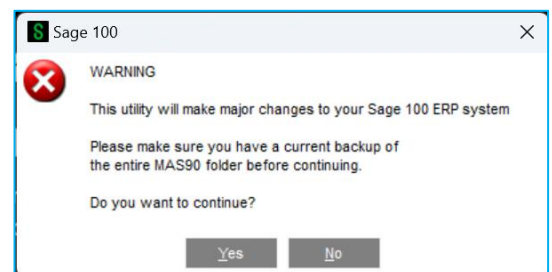
When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:

- 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.

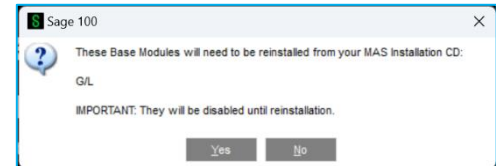
- Select **No** to exit the Uninstall Process.
- Select **Yes** to continue with the Uninstall Process.



**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.**

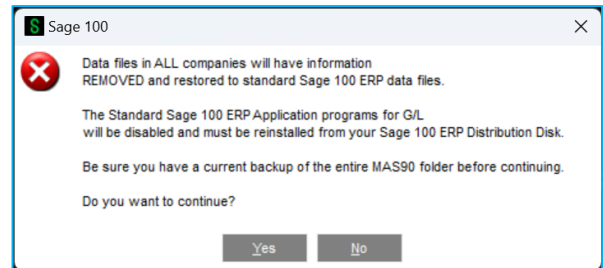
A message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

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

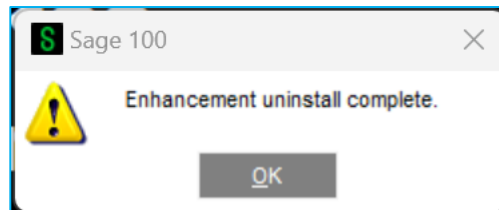


The following message box will appear, displaying the final warning message.

- 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).

# Section F: Resources and Support

## Web Resources

DSD web site: <http://www.dsdinc.com>

The Enhancement page contains:

- Current Release Schedule
- Purchasing Information
- Installation Instructions
- Product Support
- Enhancement Links

### Inventory Management InstaDocs:

<http://www.dsdinc.com/enhancement/imdm-instadocs>

The product web page contains:

- Product Description
- Web Links
- Current Product Version Table
- Product Installation File Download
- Product Manual in .pdf Format

## Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate.

- Telephone: 858-550-5900
- Fax: 858-550-4900
- Email: [enhancements@dsdinc.com](mailto:enhancements@dsdinc.com)

For a hard error, where the program displays an error dialog, report:

- Enhancement Name
- 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, faxing or email, please include:

- Your name and company
- 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.




Since 1984, DSD Business Systems has been providing clients with professional business consulting services and business software solutions across the globe. Specialties include Sage Intacct, Acumatica Cloud ERP, Sage 100, Sage 300, Sage 500, Sage CRM, Sage HRMS and more.

DSD Business Systems has been a Sage Tech Partner, commonly referred to as a “Master Developer”, for over 30 years. DSD currently has over 500 Enhancements to Sage 100 and has created thousands of custom solutions for end-users around the world. We have had the privilege of working with hundreds of Sage consultants, resellers, and end-users to produce powerful custom solutions that enhance the functionality of Sage 100.

### Contact DSD Enhancements

 [enhancements@dsdinc.com](mailto:enhancements@dsdinc.com)

 [Enhancements Marketplace](#)

 **800-627-9032**