DSD Business Systems

Sage 100 Enhancements

IMIC

Item Masterfile Synchronization

Version 7.50

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Item Masterfile Synchronization User's Manual
Version 7.50

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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

IMIC Item Masterfile Synchronization:

https://development.dsdinc.com/enhancement/imic-inventory-masterfile-synchronization/

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:

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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.

Item Masterfile Synchronization Features

IMIC allows the user adding new inventory items in Item Maintenance to automatically copy those new items to other company's Inventory Master files.

A new **Company Synchronization Maintenance** menu item has been added to the Library Master Setup Menu that allows selection of Company Codes for automatic copy of Inventory Item additions. There is a checkbox option to allow Item changes to also update other companies.

There is also a checkbox option to have a user prompted when an item is added or changed, and the user may change the companies to be updated, and save the selections by company.

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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
I/M	**Y**	7.50

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.

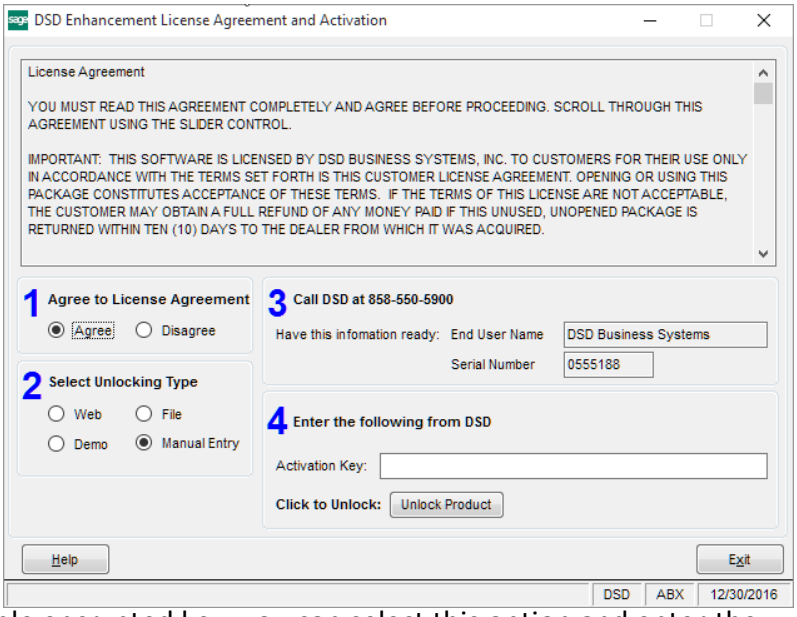
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Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt 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.

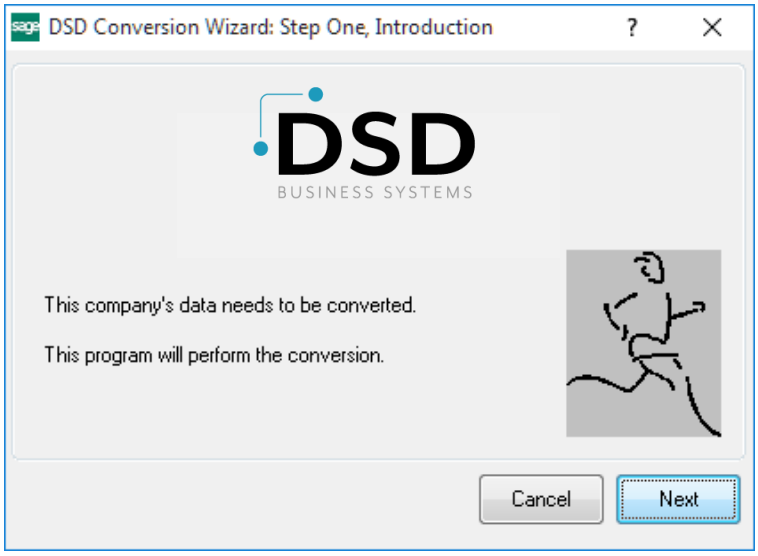
- *Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.*



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.*

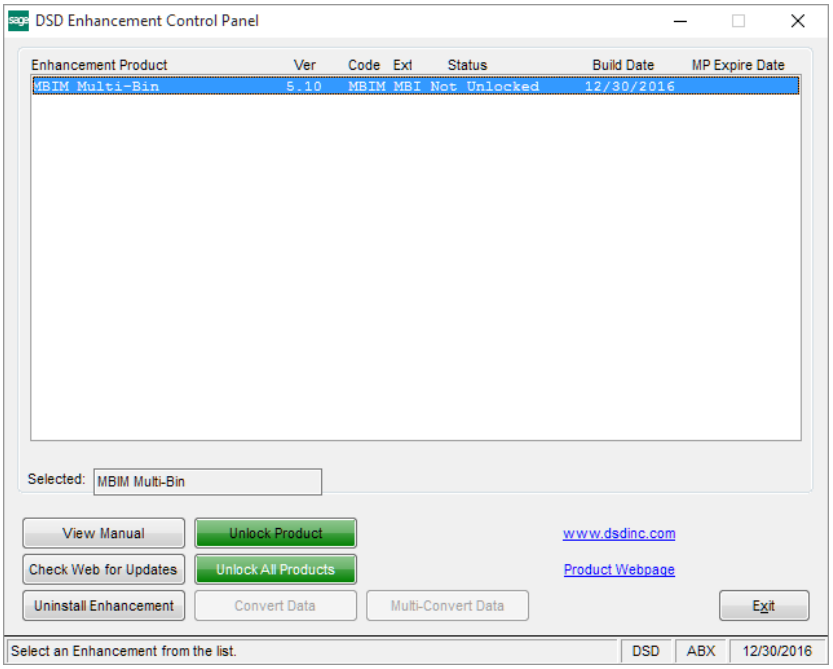
7. **Convert Data:** After unlocking, the DSD Conversion Wizard will appear. Follow on-screen instructions to complete data conversion. *You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.*



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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.*

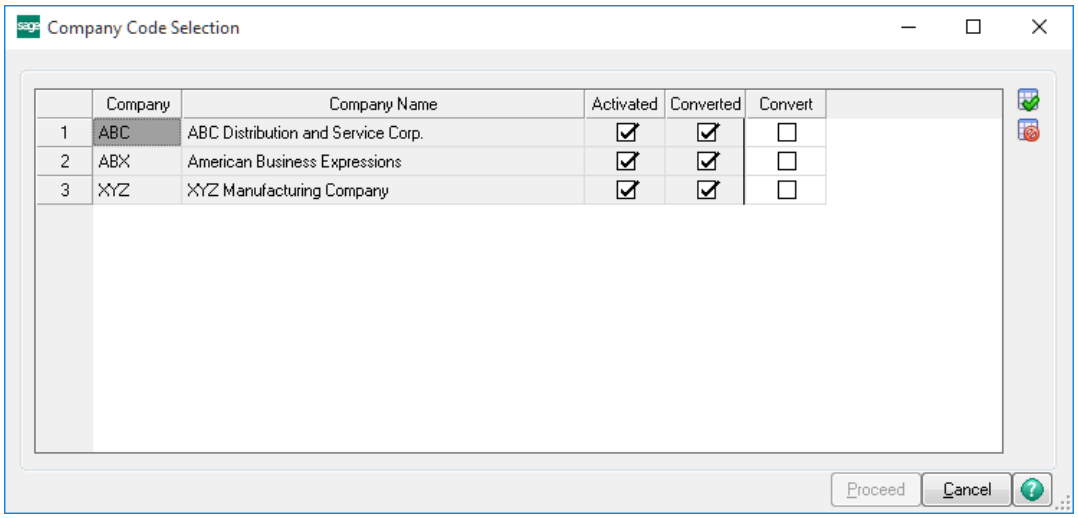
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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.

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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.

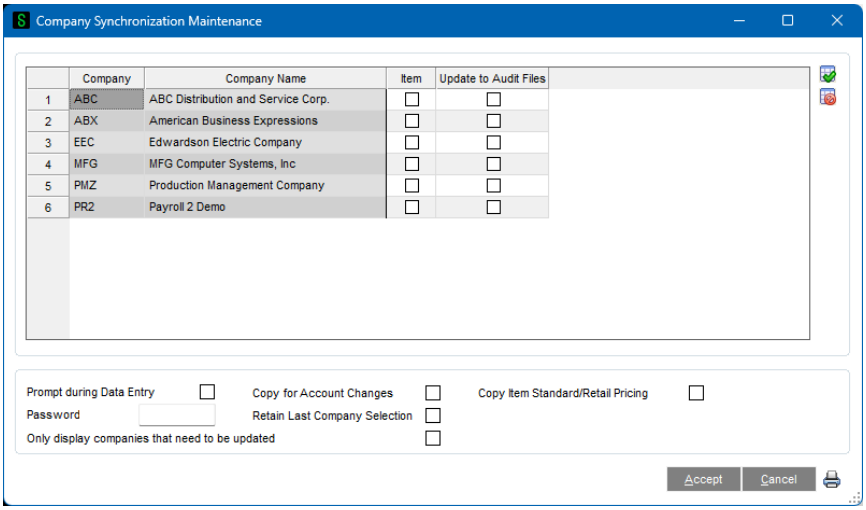
Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

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)

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Section C: Setup

A new **Company Synchronization Maintenance** menu item has been added to the Library Master Setup Menu that allows selection of Company Codes for automatic copy of Inventory Item additions. When selected, the program will display a List box with the following columns:



Check the box under '**Item**' on a line to include that company in the copy selection. If the '**Update to Audit Files**' checkbox is checked, changes made to the CI_Item file will be updated to the IM_Audit file. Below the List Box, there will be a field called "**Prompt During Data Entry**". Check this box to allow users to override the selections in Item Maintenance.

To the right of the "Prompt During Data Entry" will be a field called "**Copy for Account Changes**". Check this box to allow the item changes (such as Description, UOM, etc.) to existing Items to be copied to the other companies.

An entry in the "**Password**" field will require the user to enter a password to override the company settings on the Company Synchronization panel and Proceed with the copy to the Inventory Items. To the right of the "Password" will be a field called "**Retain Last Company Selection**". Check this box to retain the last "Included" selections by company instead of using one selection globally.

Check the **"Only display companies that need to be updated"** checkbox to only display companies that need updating. If the Item entered is a **new** item, then only those companies that do NOT have the item already setup will be displayed. If the item is **changed**, then only those companies where the item exists, and the item data is different, will be changed.

Check the **"Copy Item Standard/Retail Pricing"** to copy the field values for StandardUnitPrice, and SuggestedRetailPrice.

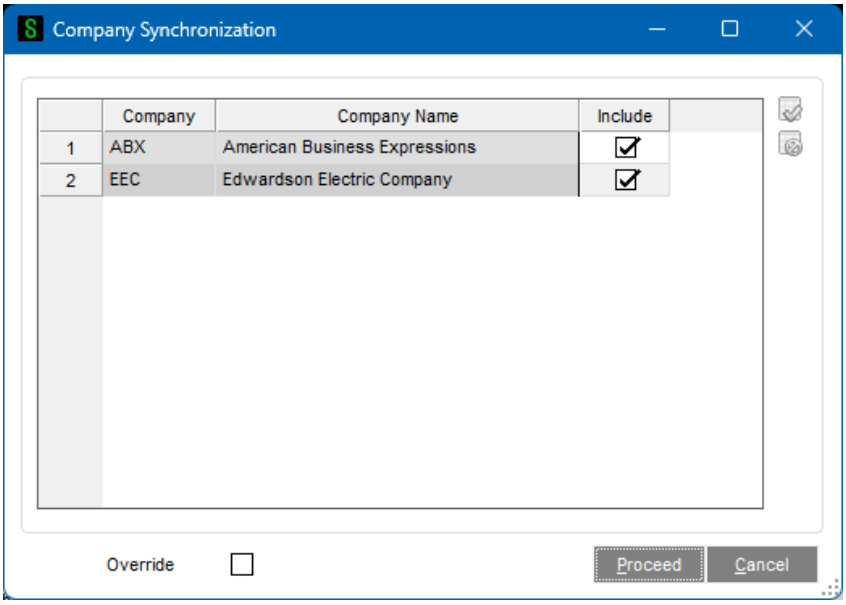
Select the **Accept** button to save the company entries, **Cancel** to void changes, and the **Printer b**utton to print a listing of the companies and associated "Include" setting.

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Section D: System Operations

Inventory Item Maintenance & On-The-Fly Entry

When a new item is created or an existing item is changed in a company and the 'Accept' button is pushed, a new "Company Synchronization" List box will be displayed if the "**Prompt During Data Entry**" check box is checked.

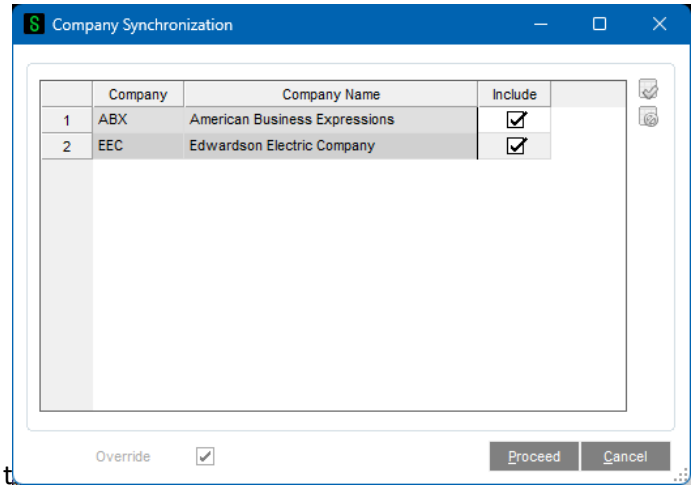


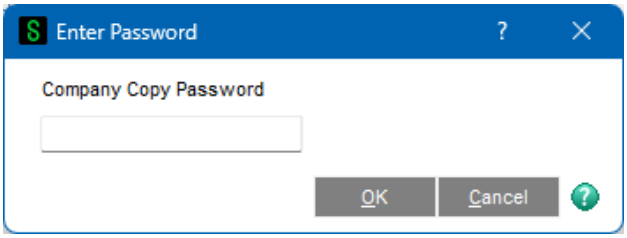
If the field is **not** checked, then the user will **not** be prompted with the "Company Synchronization" List box.

The list box will only show companies that have been selected in Setup, and the "Include" field will be to the right of each company code, defaulted to "Y". If the "**Retain Last Company Selection**" option has been checked, the "Include" selections will be saved by company.

If there is no Password entered in maintenance, the user will be allowed to toggle the "Include" field to "N".

If a password has been entered in maintenance, the "Company Synchronization" List box will be displayed with the selection's "Proceed" button disabled. The user will be able to check the "Override" checkbox to allow entry of the password.



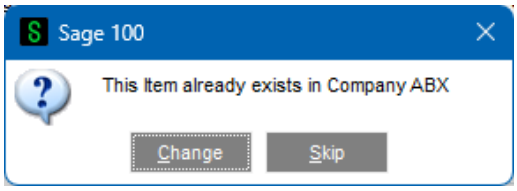


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When the correct password is entered, the company selection's "Proceed" button will be enabled and the user will be able to toggle any of the selections by clicking on the line.

If the item already exists in the other company, the user will be prompted and there will be two buttons the user can select:



Change – if the user selects this, then the item will be copied over anyways.
Skip – if the user selects this, then that company copy will be skipped.

If the "**Copy for Account Changes**" box is checked in maintenance, then the same copy functionality will occur when a user changes a field for an existing item, such as Description.

The Copy functionality will include the copy of all UDF's for the CI_Item file.

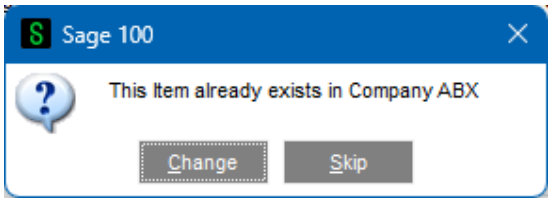
These fields will be excluded from copy:

Primary Vendor (will be copied over as <blank>)

Retail Price (will be copied over as zero)

Standard Price (will be copied over as zero)

If the "**Copy for Account Changes**" box is checked in Setup, and the item exists in the 'Copy To' company, the system will prompt the user to 'Change' or 'Skip':

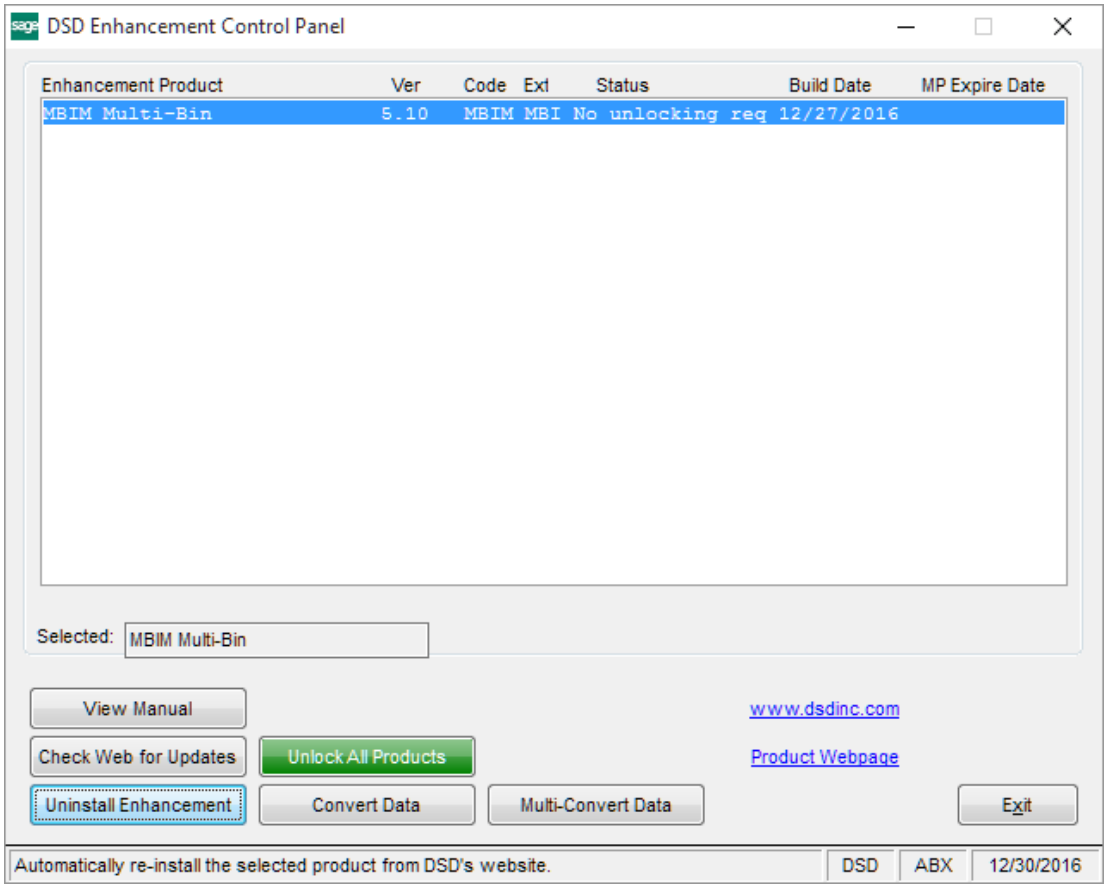


If items are created using Visual Integrator, then the companies setup in Company Consolidation Maintenance will be copied to automatically.

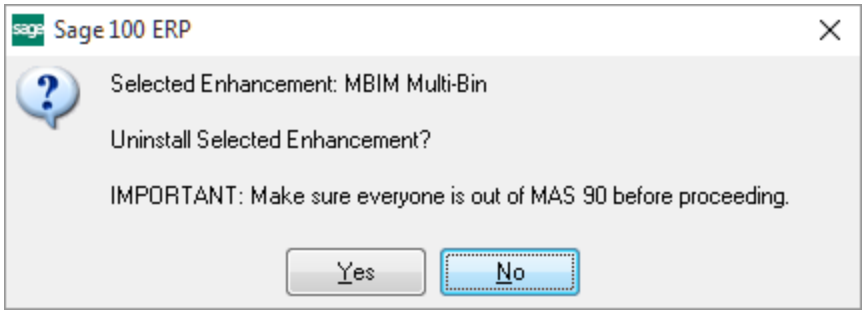
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Section E: Uninstall DSD Enhancements

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.



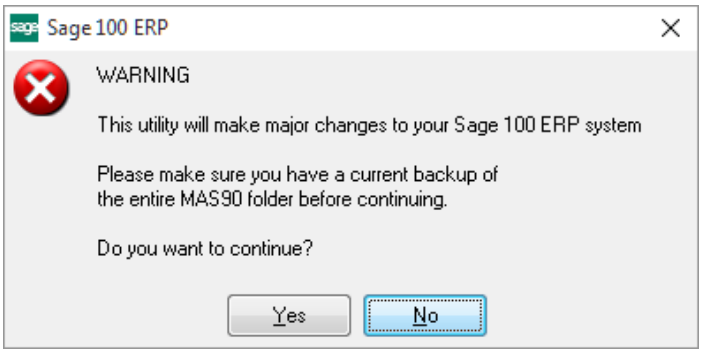
When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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

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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.



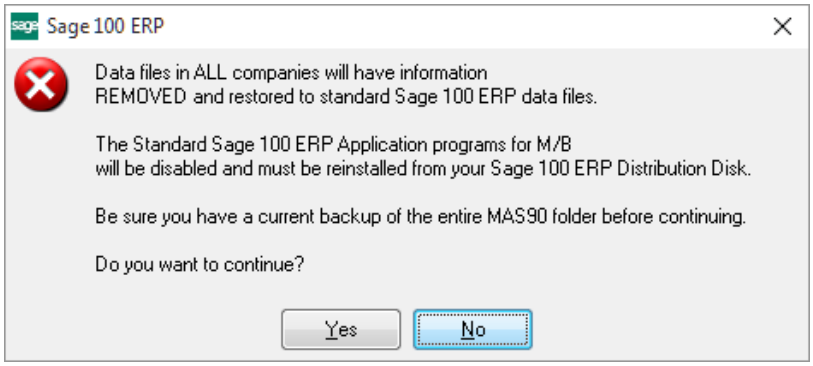
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

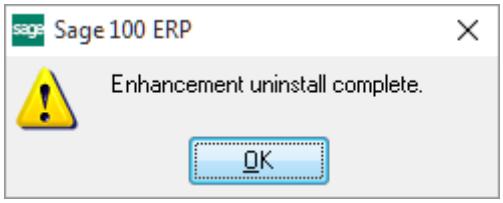
The following message box will appear, displaying the final warning message.



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.

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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).

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