

DSD BUSINESS SYSTEMS

SAGE 100 ENHANCEMENTS

SMDM

SERVICE CENTER INSTADOCS

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Service Center InstaDocs

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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.

Service Center InstaDocs Features

Service Center 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.

Service Orders, Service Items 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!

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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	SMDM
Common Information	✓
Accounts Payable	✓
Accounts Receivable	✓
Purchase Order	✓
Sales Order	✓
Inventory Management	✓
Job Cost	✓

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.

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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.

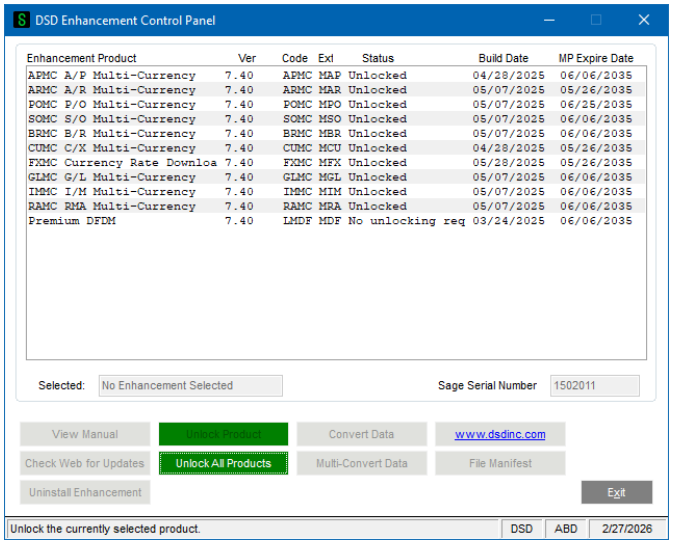
DSD Enhancement Control Panel

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.

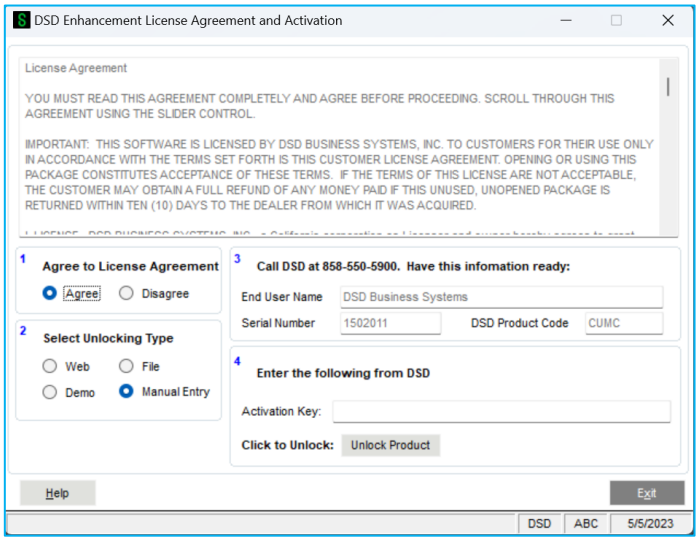
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View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not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

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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**.

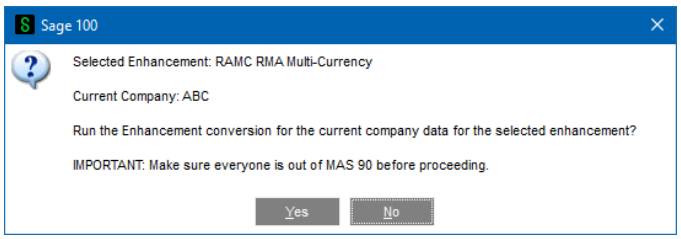
Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

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.

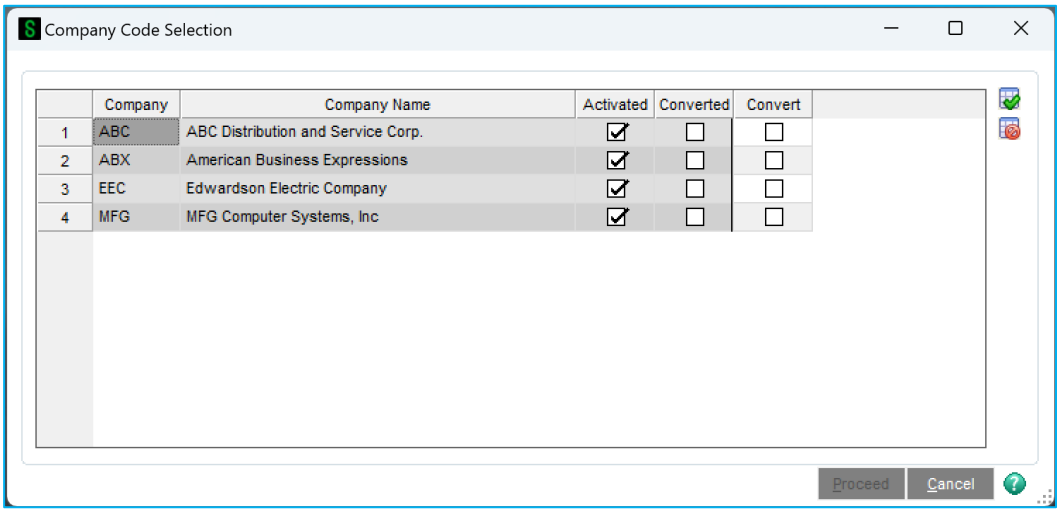
Manual Entry Unlock**:** If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

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.)*



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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

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

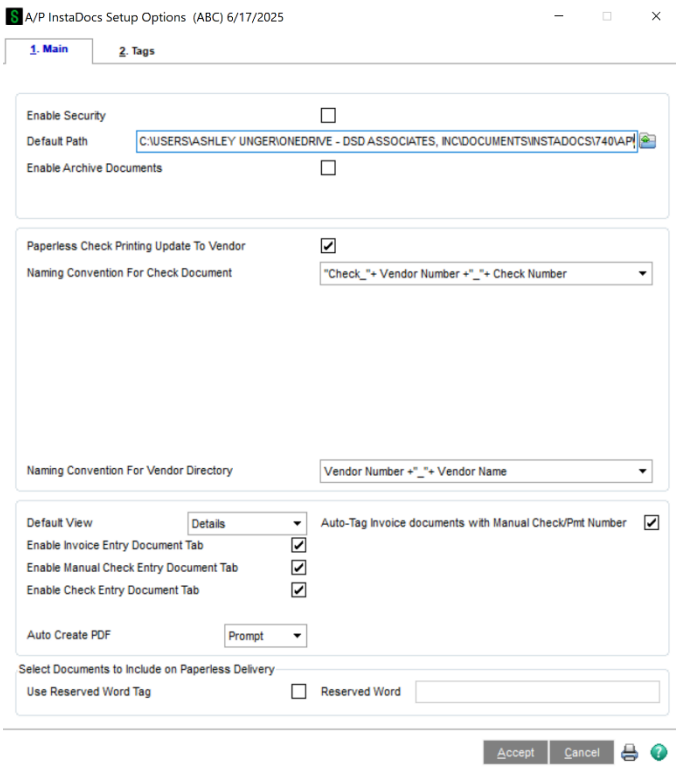
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InstaDocs Setup Options

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

***InstaDocs* Setup Options** has been added as a menu item on the Service Center Setup menu.

On the Main Tab, the following fields are available:



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.

Default Path: Enter the path for Service Items to be stored. As documents are Drag and Dropped or pasted into the Service Item InstaDocs panel, the document directory will be automatically created using this Default Path, plus the Naming Convention Service Item Code + "_" + Serial Number. The Default Path can be a local drive, network drive or Microsoft's One Drive™.

Enable Archive Documents: Selecting this checkbox turns on the archive features of InstaDocs.

Default Archive Path: Enter the starting path to the service archive documents. Documents can be added to the archive path via the "archive documents" button in Service Item Maintenance or Drag and Drop when the archive directory is selected.

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Paperless Service Order Printing Update To Customer: Selecting this checkbox turns on the Paperless Service Order Printing feature.

Naming Convention for Service Order Document: With the **Paperless Service Oder Printing Update to Customer** feature turned on, the naming convention of the Service 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:

- Service Order Number
- Customer Number + "_" + Service Order Number
- "Service Order _" + Service Order Number
- "Service Order _" + Customer Number + "_" + Service Order 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 Service Order Entry Document Tab: Select this checkbox to enable the ***InstaDocs*** Panel in S/M Service Order Entry.

Enable Service Item Entry Document Tab: Select this checkbox to enable the ***InstaDocs*** Panel in S/M Service Item Maintenance.

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"

Enable Auto-Tag of Service Order number in Invoice/Shipping Entry: Select this checkbox to enable documents that are tagged in Service Order Entry, to ALSO be tagged with the S/M Service

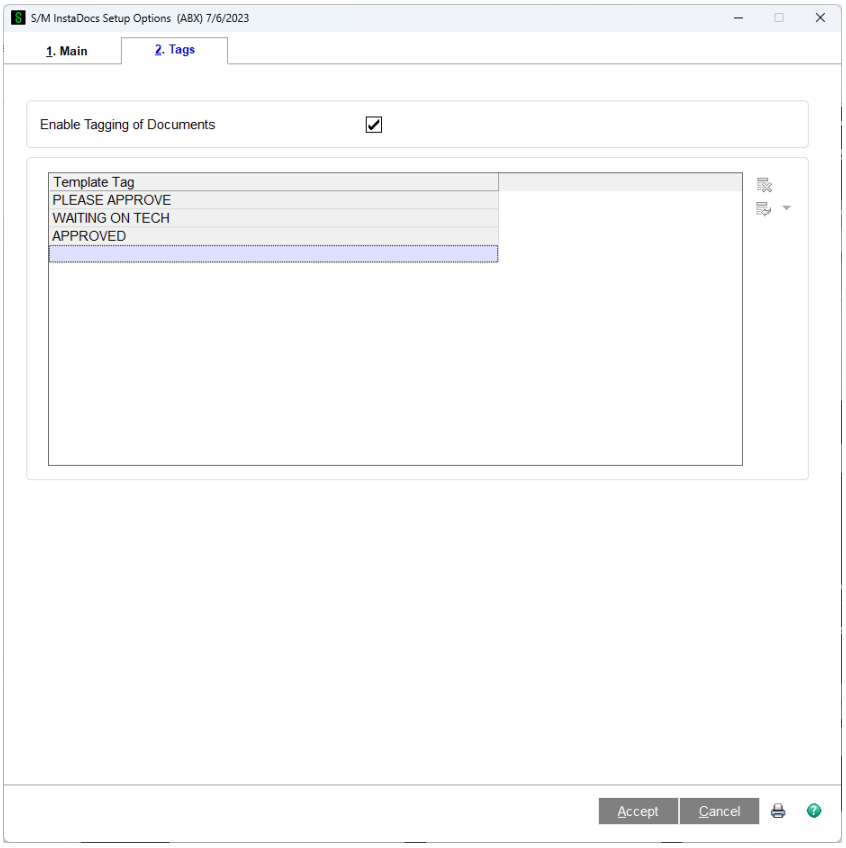
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Order Number during Invoice/Shipping Data Entry. The end-result is that the documents that are displayed on the Service Order Entry *InstaDocs* Tab for a Service Order will also be displayed in Invoice/Shipping Data Entry.

Enable Auto-Tag of Service Order number for Sales Order generations: Select this checkbox to enable documents that are tagged in service order Entry, To ALSO be tagged with the S/M Service order number.

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”

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.



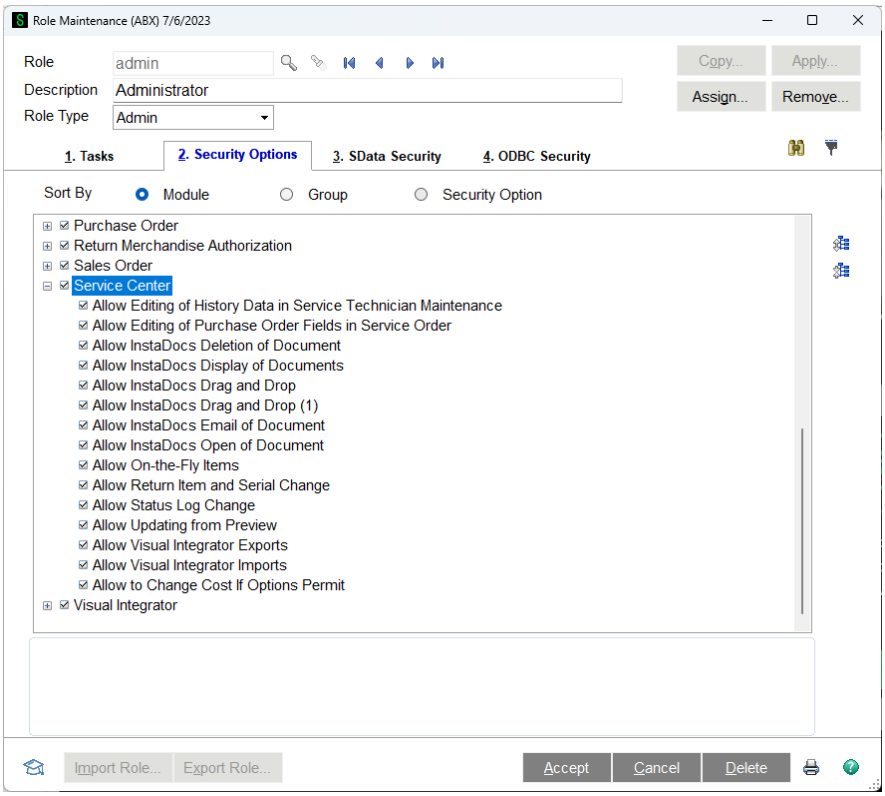
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Enable Tagging of Documents: Select this checkbox to allow for tagging of documents. Tagging can be done by selecting one or more documents in the ***InstaDocs*** Tab in various Maintenance, Data Entry, and Inquiry programs, and then selecting the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

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.

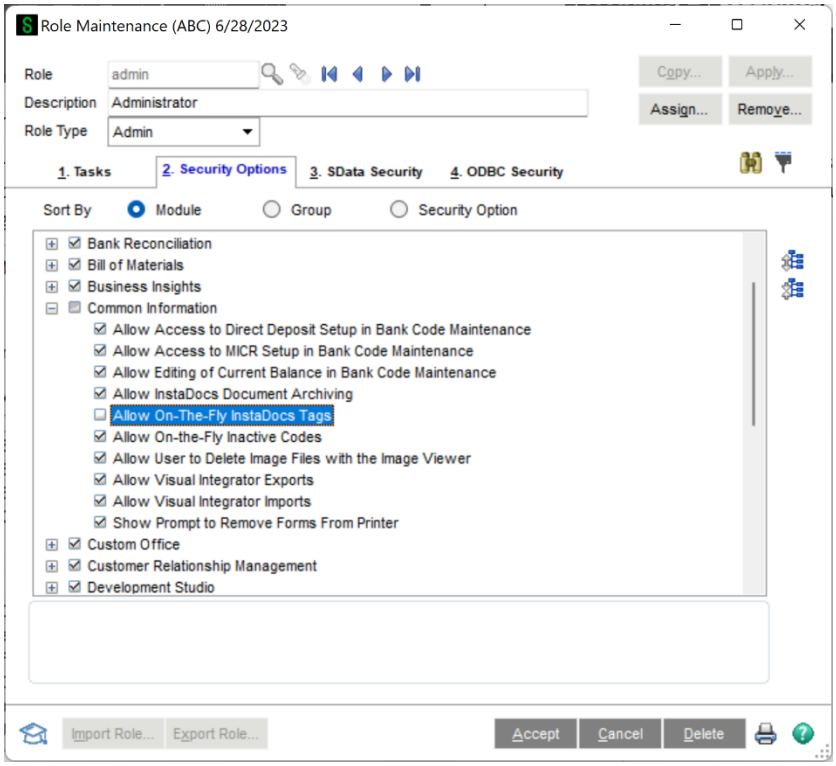
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Allow InstaDocs Open of a Document: Allow/Disallow the open of a document from the InstaDocs Document Tab.

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.

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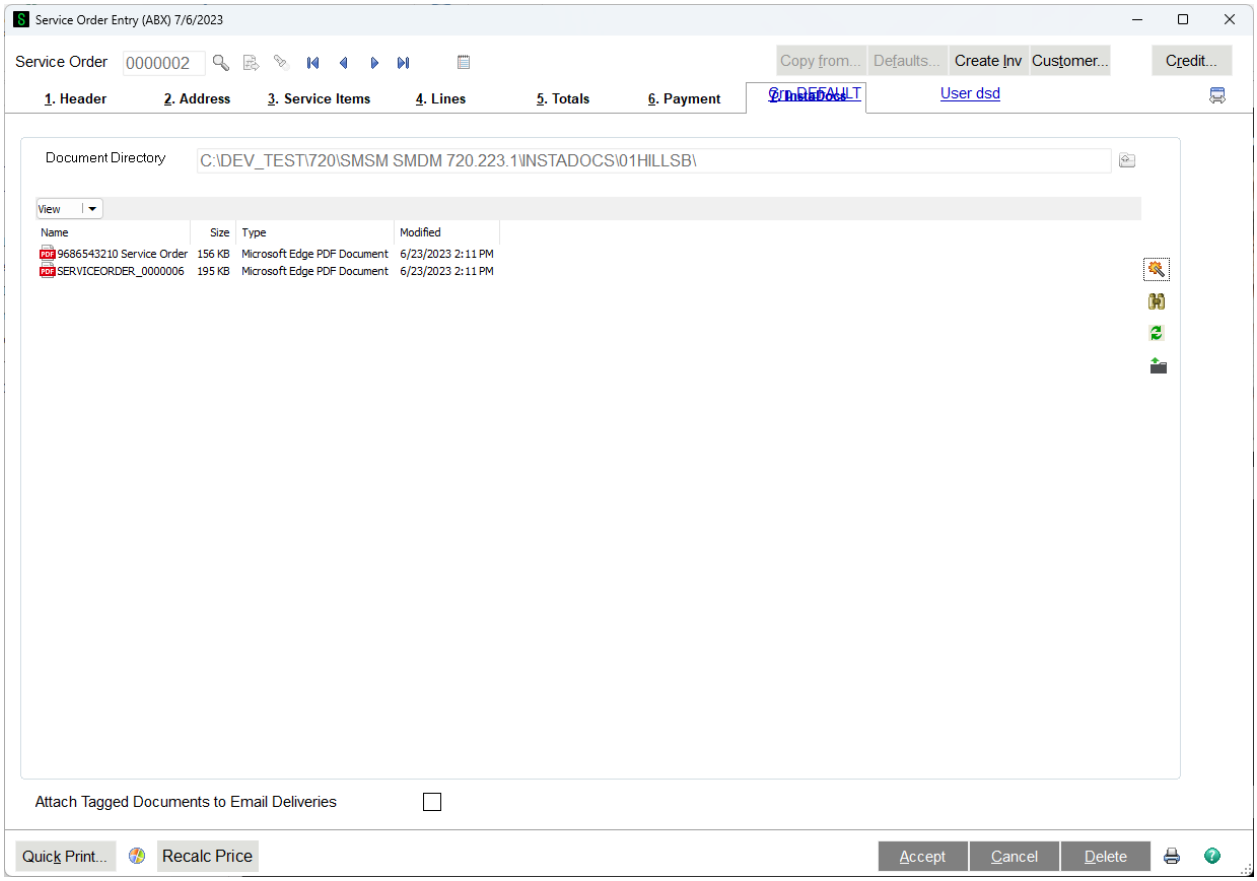
Section D: System Operations

Customer Maintenance

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

Service Order Entry

The ***InstaDocs*** Tab has been added to the S/M Service Order Entry Panel.



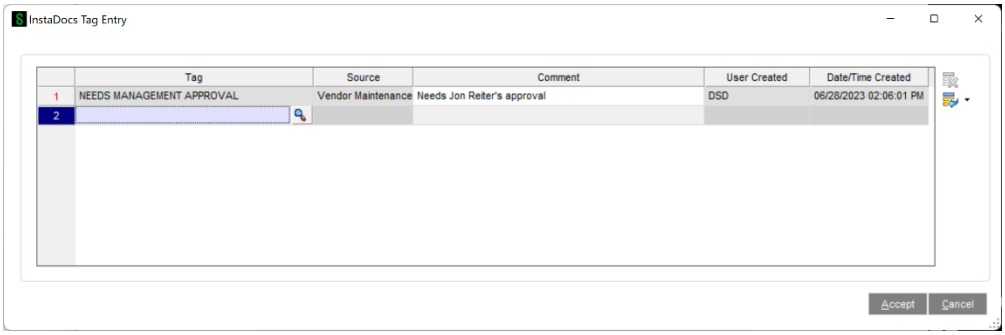
Document Directory: This directory is based on the setting in Customer Maintenance. All documents that are Drag and Dropped or Pasted into this panel are saved into this Customer directory.

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

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

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- 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/M Service Order Number.

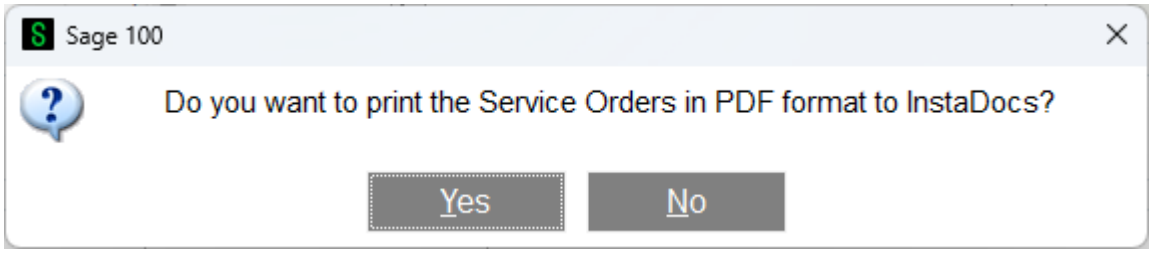


All tags will have system-generated **User Created** and **Date/Time Created** fields added. The Date/Time is based on when the tag was created.

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

Service Order Printing

After Service Orders 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 **A/R Customer Naming Convention** setting in ***InstaDocs* Setup Options**.

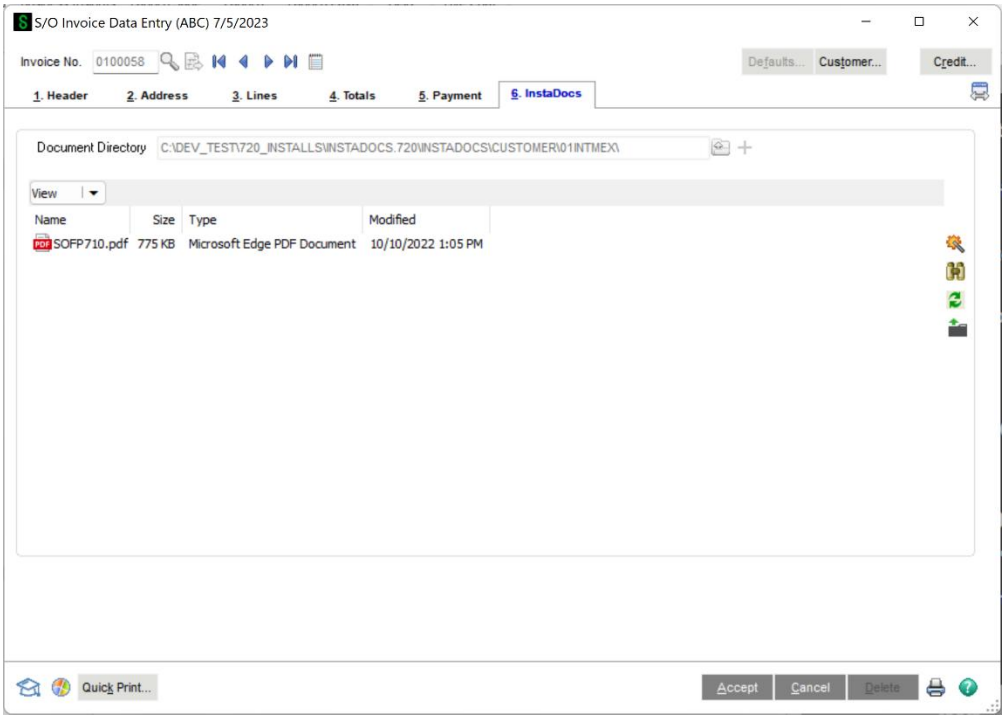
As the PDF is saved, the document is Auto-Tagged with the Service Order Number.

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

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Invoice Data Entry and Shipping Entry

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



*Note documents from the S/M Service Order will pull through to the invoice.

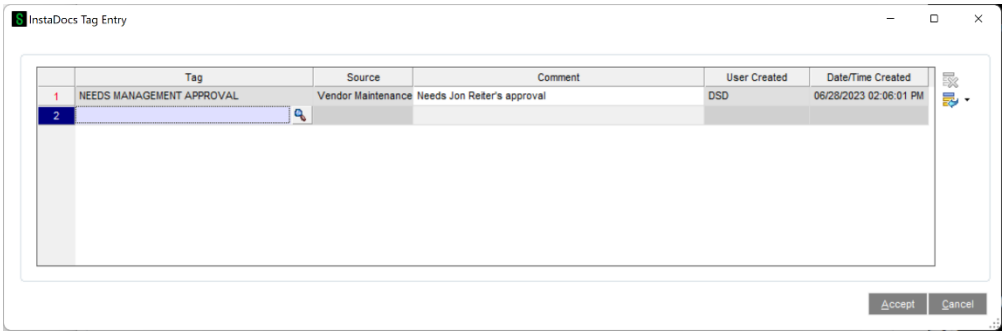
Document Directory: This directory is based on the setting in Customer Maintenance. All documents that are Drag and Dropped or Pasted into this panel are saved into this Customer directory.

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

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 Invoice Number.

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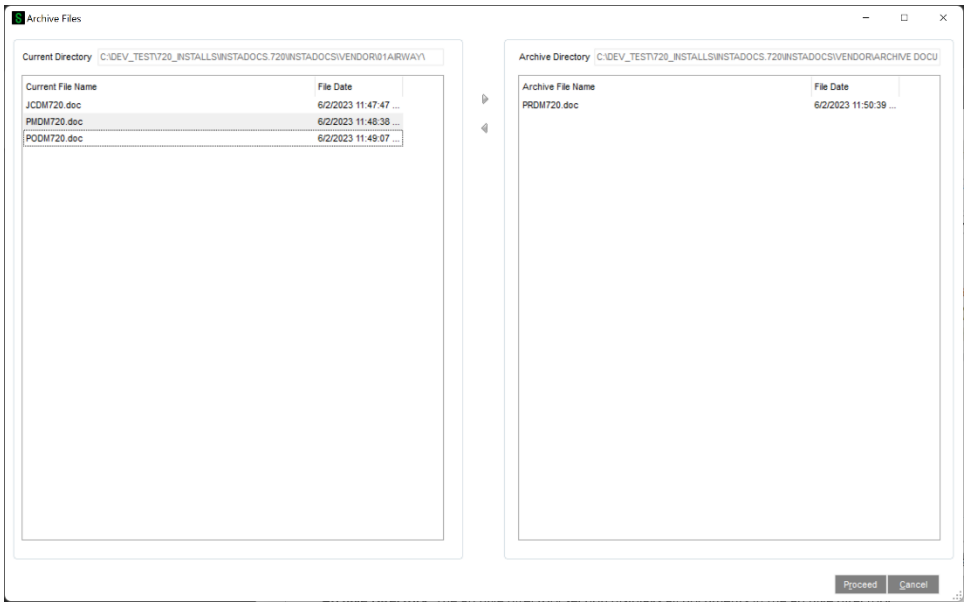
All tags will have system-generated **User Created** and **Date/Time Created** fields added. The Date/Time is based on when the tag was created.

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 Service 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 Service Order Entry *InstaDocs* Tab for a Service Order will also be displayed in Invoice/Shipping Data Entry.

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**.



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

Archive Directory: The archive directory section dislplays 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 Service Center 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.

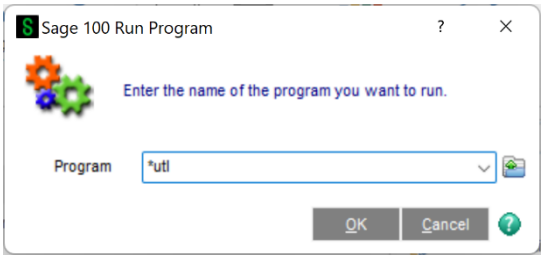
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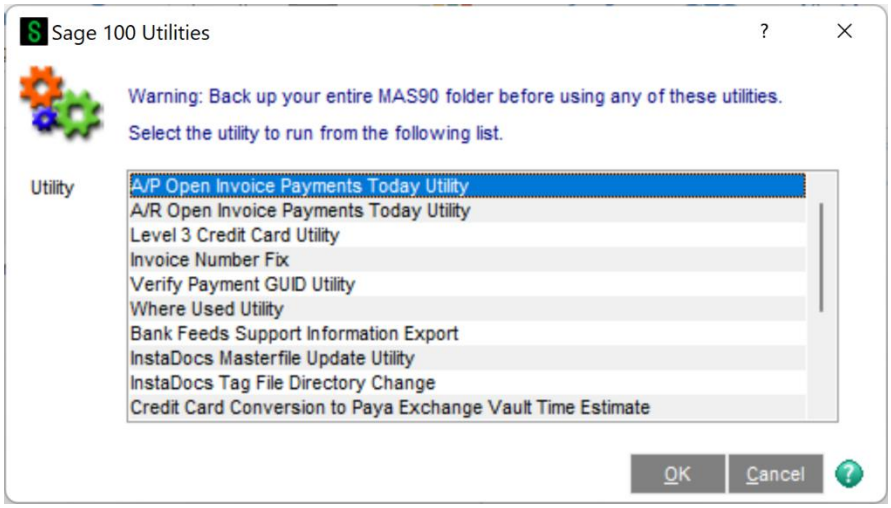
   a. A new directory will be created for those that don't already exist.
3. The InstaDocs Directory for each Masterfile record for the specified module will be updated with the new Default Directory
4. The InstaDocs Tag file will be updated for all tags that contain the original path.

Utilities

Sage file > Run > *UTL

Here are the Panels when running:



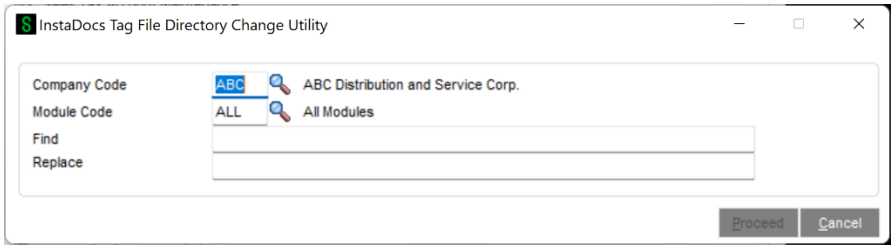


InstaDocs Masterfile Update Utility: This utility will update the Masterfile directories.

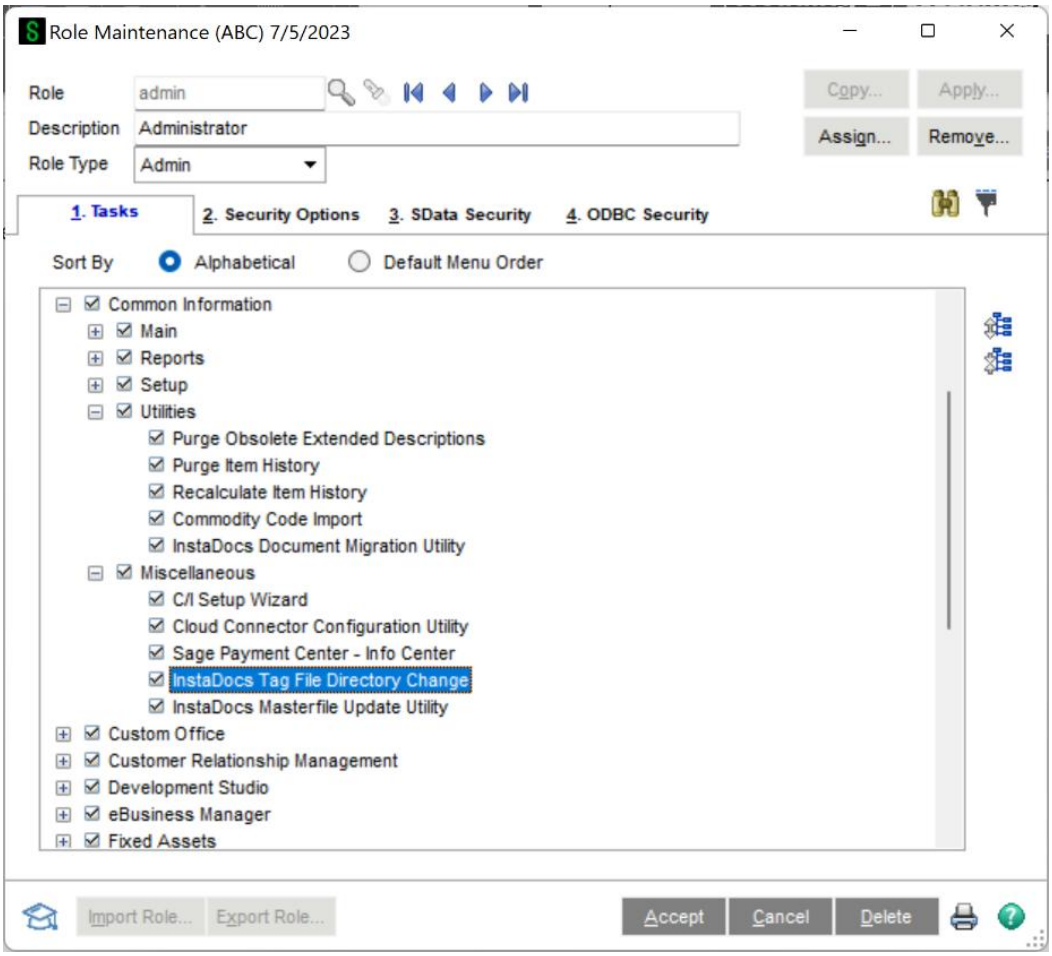


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InstaDocs Tag File Directory Change Utility: This utility will Find and Replace the directory for the tag file.



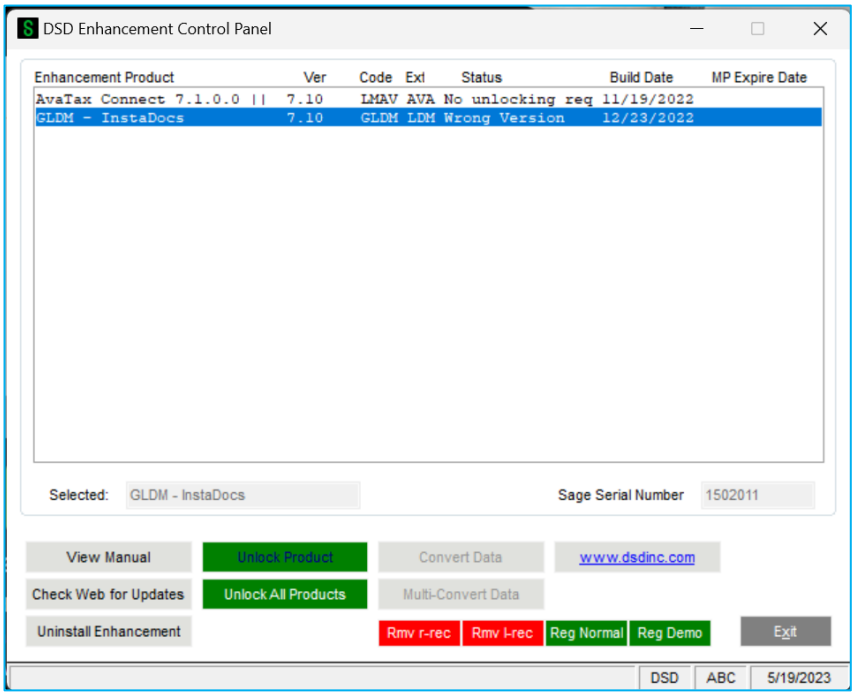
Two new security tasks have been added. “InstaDocs Tag File Directory Change” and “InstaDocs Masterfile Update Utility”



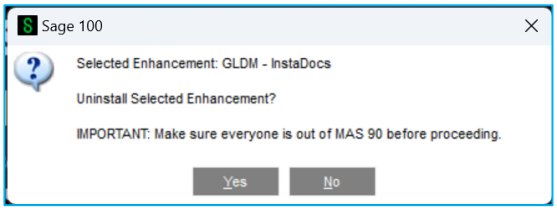
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Section E: Uninstall DSD Enhancements

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.

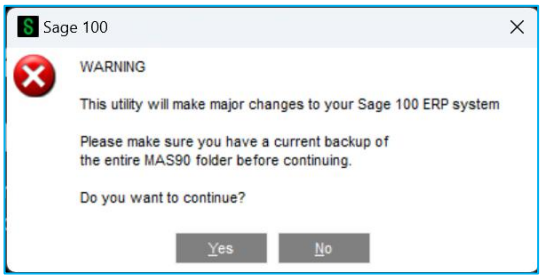


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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

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.

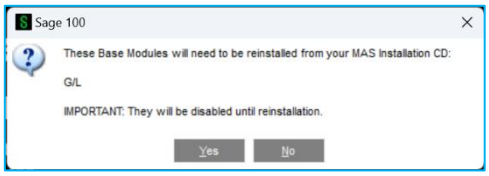


- Select **No** to exit the Uninstall Process.
- Select **Yes** to continue with the Uninstall Process.

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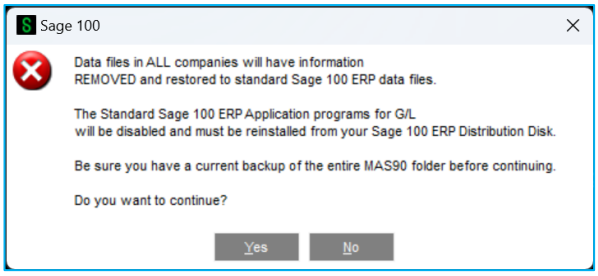
After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

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



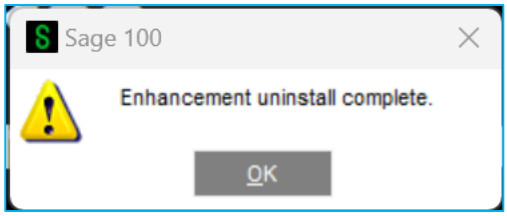
- Select **No** to exit the Uninstall Process.
- Select **Yes** to continue with the Uninstall Process.

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).

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Section I: 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

Service Center InstaDocs:

http://www.dsdinc.com/enh/pages/SMDM.htm

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

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

- Enhancement Name
- Error number
- Program name
- Line number
- Program version

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- 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.

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DSD BUSINESS SYSTEMS



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

Enhancements Marketplace

800-627-9032

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