



# DSD Business Systems

**Sage 100 Enhancements**

**CIDM**

**Lot/Serial InstaDocs**

**Version 7.30**



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I/M InstaDocs User's Manual  
Version 7.30

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## Section A: Introduction

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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*

CIDM 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*
- 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.

### **CIDM Lot/Serial InstaDocs Features**

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

### CAUTION

- **If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.**
- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.
- **Check with DSD before installing more than one Enhancement.**

### Required Levels

| Sage 100 Module | Module Required | Required Level |
|-----------------|-----------------|----------------|
| C/I             | Y               | 7.30           |

### 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.

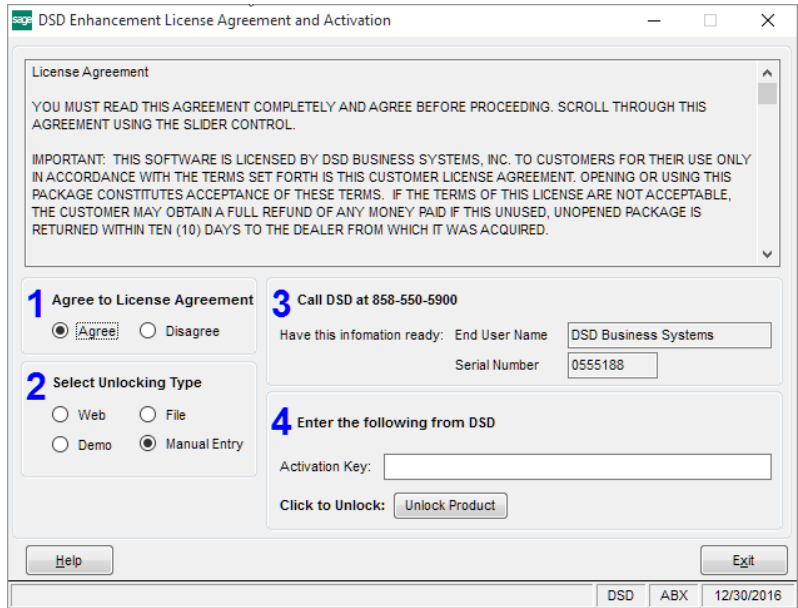
**File Unlock:** After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

**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.

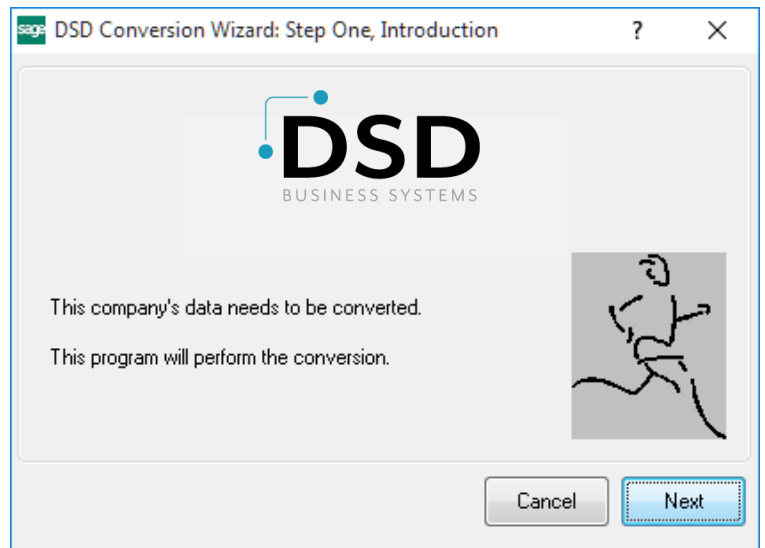
- *Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.*



**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.*

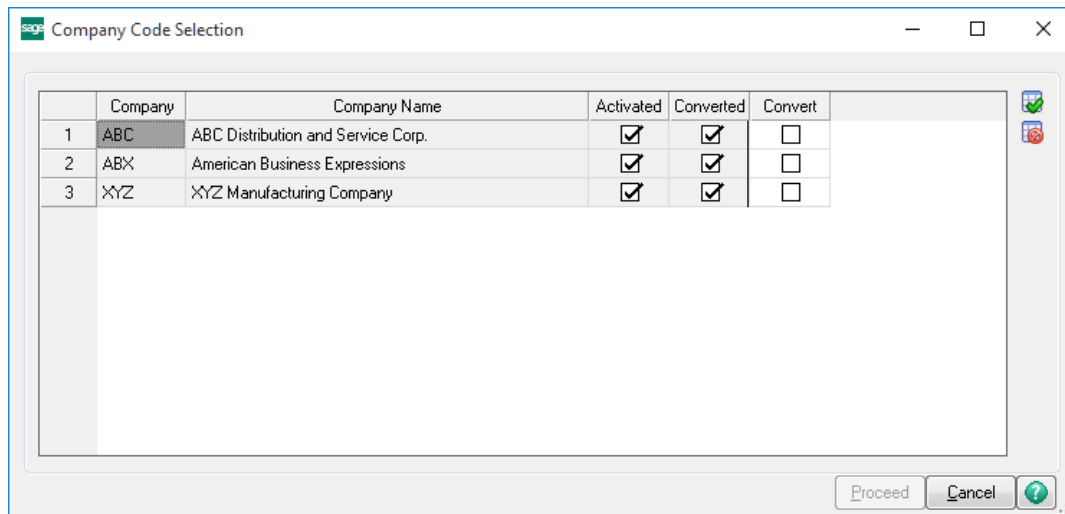
**Unlock All Products:** This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*

**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

**I/M InstaDocs Setup Options** has an "Enable Lot/Serial Instadocs" Checkbox

Screenshot of the I/M InstaDocs Setup Options dialog box. The dialog has two tabs: "Main" and "Tags". Under the "Main" tab, there are several settings:

- Enable Security:
- Default Path: C:\710\INSTA\
- Enable Archive Documents:
- Default Archive Path: C:\INSTADOCSEARCHIVE\
- Naming Convention For Item Directory: Item Number
- Default View: Details
- Enable Lot/Serial InstaDocs:

Buttons at the bottom: Accept, Cancel, and a help icon.

***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

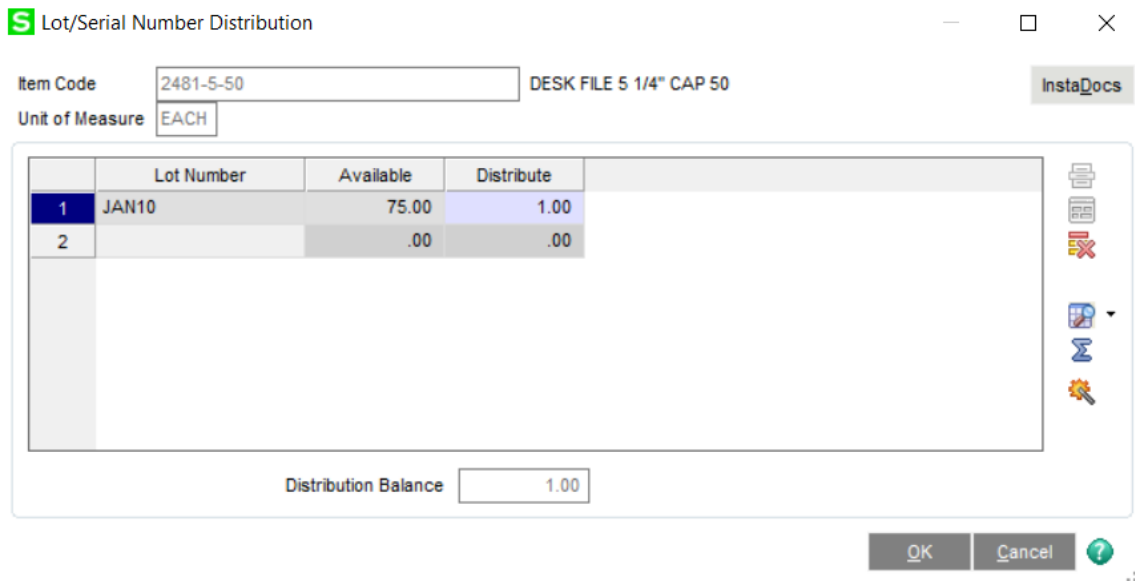
**Important:** All InstaDocs documents that are for Lot/Serial Numbers are saved into the Inventory InstaDocs document directory, and are tagged with the Lot/Serial Number. When a document is dragged/dropped or copy/pasted to the InstaDocs panel for Lot/Serial Number allocation, that document will appear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

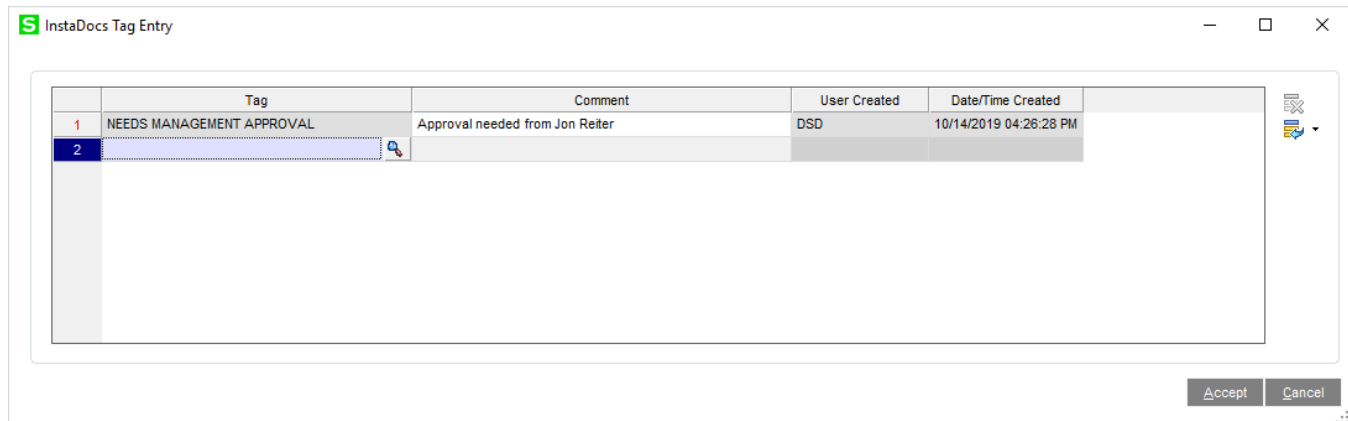
When this button is selected, a new InstaDocs Panel will be displayed, with all features that are available in other InstaDocs panels. All documents placed into this panel will be saved to the IMDM Item Document Directory for that Item Code, and auto-tagged with the Lot/Serial Number. The InstaDocs panel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

InstaDocs Search — □ ×

| Select Field | Operand | Value |
|--------------|---------|-------|
| Tag          | All     |       |
| File Name    | All     |       |


Source:  ▼

**Search**

Document Directory:

| File Name | Directory | Tag | Source Code | Document Type |
|-----------|-----------|-----|-------------|---------------|
|           |           |     |             |               |

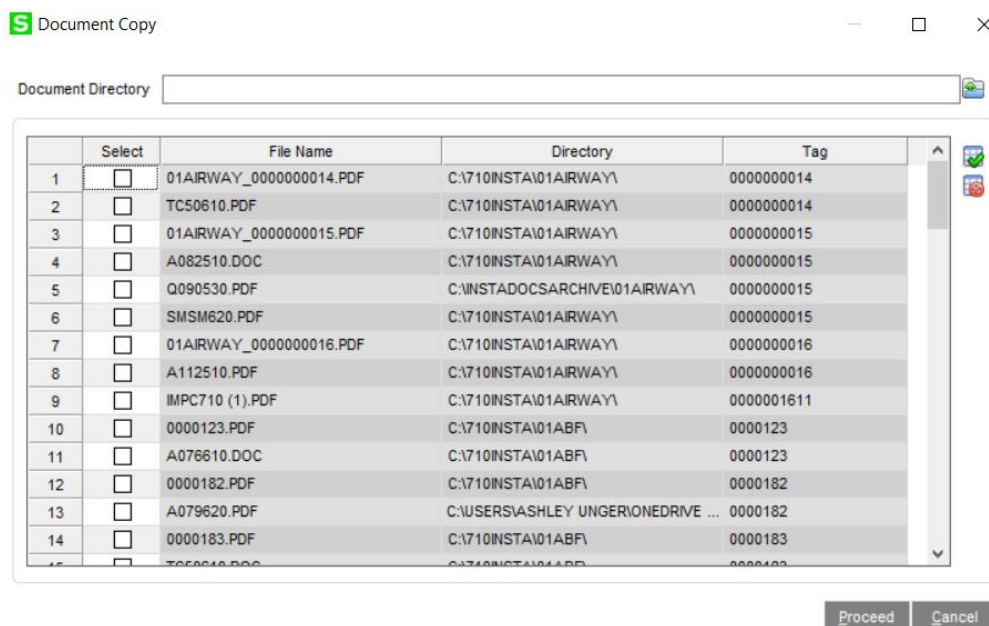
**Search Display Panel:** This panel will display the documents found in the search. The directory path is also displayed. Double-click on the row in the **Search Display Panel** to **open** the document.

**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.

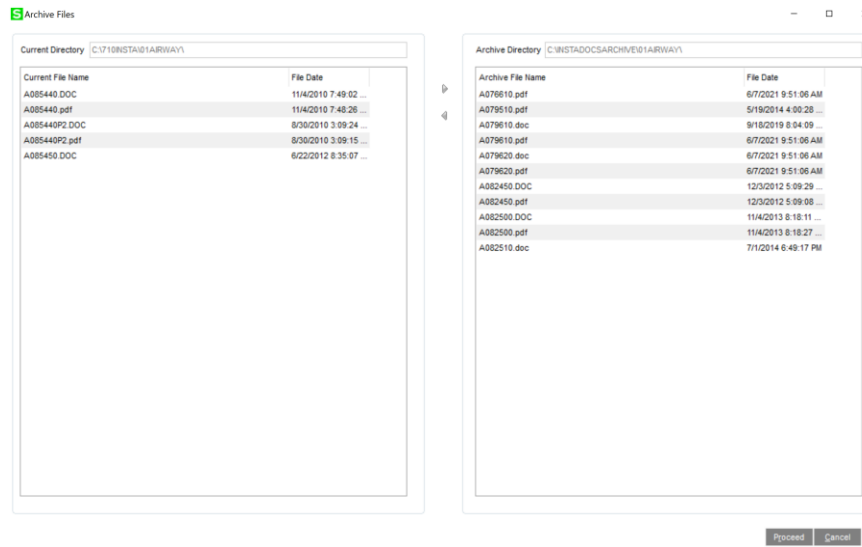
**Clear All button** – selecting this button will uncheck the Select checkbox for all entries.

**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**.



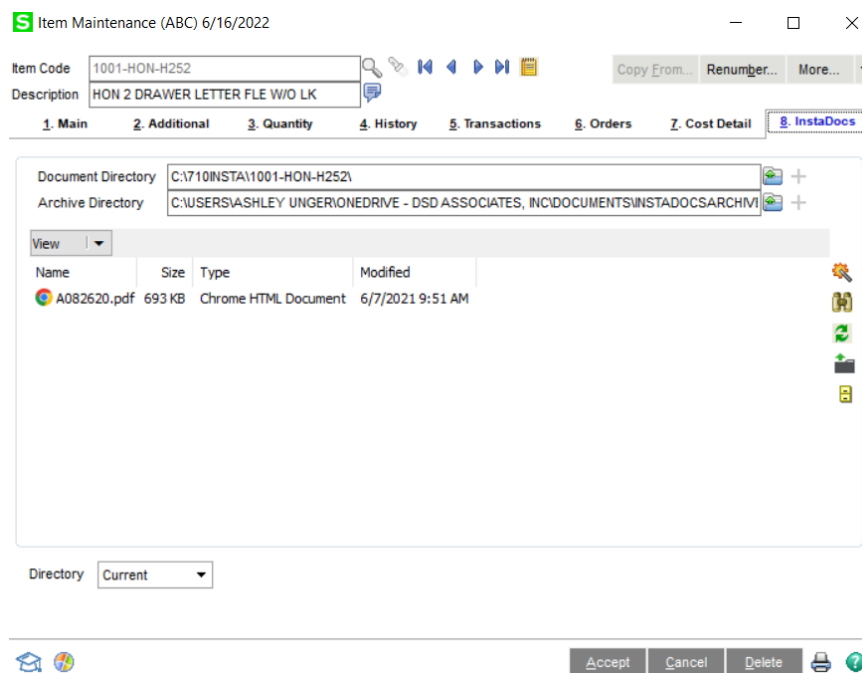
**Current Directory:** The current directory section displays all documents in the current directory.

**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.

### Item Maintenance / Cost Detail Panel

The *InstaDocs* Tab on Item Maintenance Panel will include documents related to Lot/Serial entries.





The InstaDocs “Magic Wand” **button** has been added to right side of the Lot/Serial display panel. When this button is selected, a new InstaDocs Panel will display. You are able to drag/drop or copy/paste documents to this panel. All documents placed into this panel will be saved to the IMDM 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.

Item Maintenance (ABC) 8/18/2023

Item Code: 2480-8-50  
Description: DESK FILE 8" CAP 50

1. Main 2. Additional 3. Quantity 4. History 5. Transactions 6. Orders 7. Cost Detail 8. InstaDocs

Warehouse: 000 CENTRAL WAREHOUSE

| Whse | Description   | Lot No. | Receipt Date | Receipt No. | Quantity | Unit Cost | Extension  | Item |
|------|---------------|---------|--------------|-------------|----------|-----------|------------|------|
| 000  | CENTRAL WA... | 101     | 5/31/2025    | G001008     | 9,694.00 | 15.453    | 149,801.38 | 15.  |
| 000  | CENTRAL WA... | 10210   | 5/31/2025    | G001007     | 200.00   | 15.453    | 3,090.60   | 15.  |
| 000  | CENTRAL WA... | JAN10   | 1/25/2025    | RC-0111     | 325.00   | 15.800    | 5,135.00   | 15.  |
| 000  | CENTRAL WA... | MAR10   | 3/25/2025    | RC-0225     | 850.00   | 15.453    | 13,135.05  | 15.  |
| 000  | CENTRAL WA... | MAY20   | 5/31/2025    | G001013     | 300.00   | 15.810    | 4,743.01   | 15.  |

Buttons: Accept, Cancel, Delete

Item Maintenance (ABC) 8/18/2023

Item Code: 2480-8-50  
Description: DESK FILE 8" CAP 50

1. Main 2. Additional 3. Quantity 4. History 5. Transactions 6. Orders 7. Cost Detail 8. InstaDocs

Warehouse: 000 CENTRAL WAREHOUSE

| Whse | Description   | Lot No. | Receipt Date | Receipt No. | Quantity | Unit Cost | Extension  | Item |
|------|---------------|---------|--------------|-------------|----------|-----------|------------|------|
| 000  | CENTRAL WA... | 101     | 5/31/2025    | G001008     | 9,694.00 | 15.453    | 149,801.38 | 15.  |
| 000  | CENTRAL WA... | 10210   | 5/31/2025    | G001007     | 200.00   | 15.453    | 3,090.60   | 15.  |
| 000  | CENTRAL WA... | JAN10   | 1/25/2025    | RC-0111     | 325.00   | 15.800    | 5,135.00   | 15.  |
| 000  | CENTRAL WA... | MAR10   | 3/25/2025    | RC-0225     | 850.00   | 15.453    | 13,135.05  | 15.  |

InstaDocs

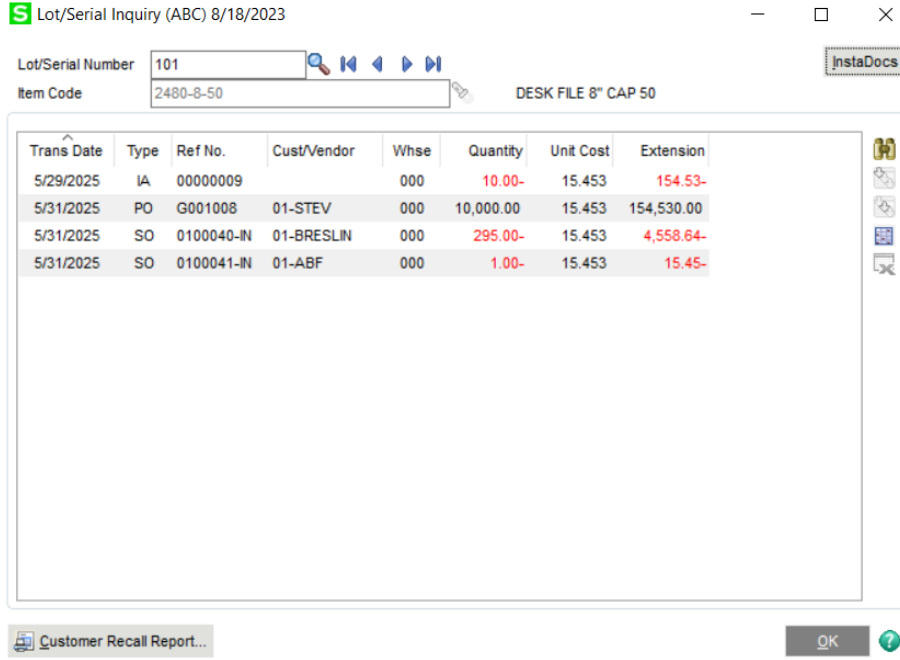
Document Directory: C:\710\INSTA\2480-8-50\  
Archive Directory: C:\INSTADOC\ARCHIVE\2480-8-50\

| Name        | Size   | Type                              | Modified         |
|-------------|--------|-----------------------------------|------------------|
| A079610.doc | 442 KB | Microsoft Word 97 - 2003 Document | 6/7/2021 9:51 AM |

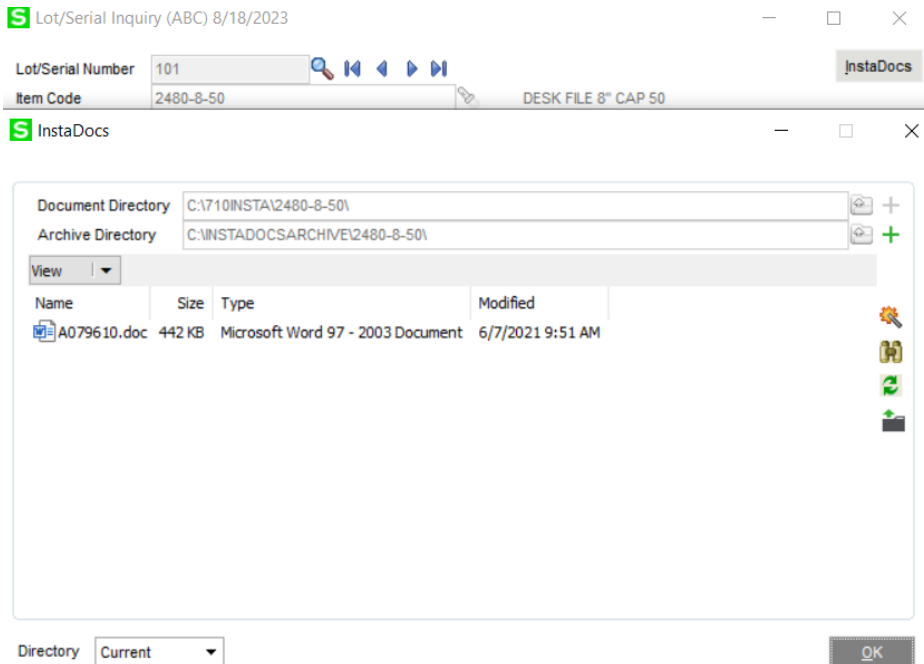
Directory: Current

### Lot/Serial Inquiry

A “InstaDocs” **button** has been added to the top-right of the Lot/Serial Inquiry panel. When this button is selected, a new InstaDocs Panel will display. The InstaDocs panel will display all documents in the Item Directory that have that Lot/Serial tag.



The user will be able to drag/drop or copy/paste documents to this panel. All documents placed into this panel will be saved to the IMDM Document Directory for that Item Code, and auto-tagged with the Lot/Serial Number.



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### ***InstaDocs SuperSearch***

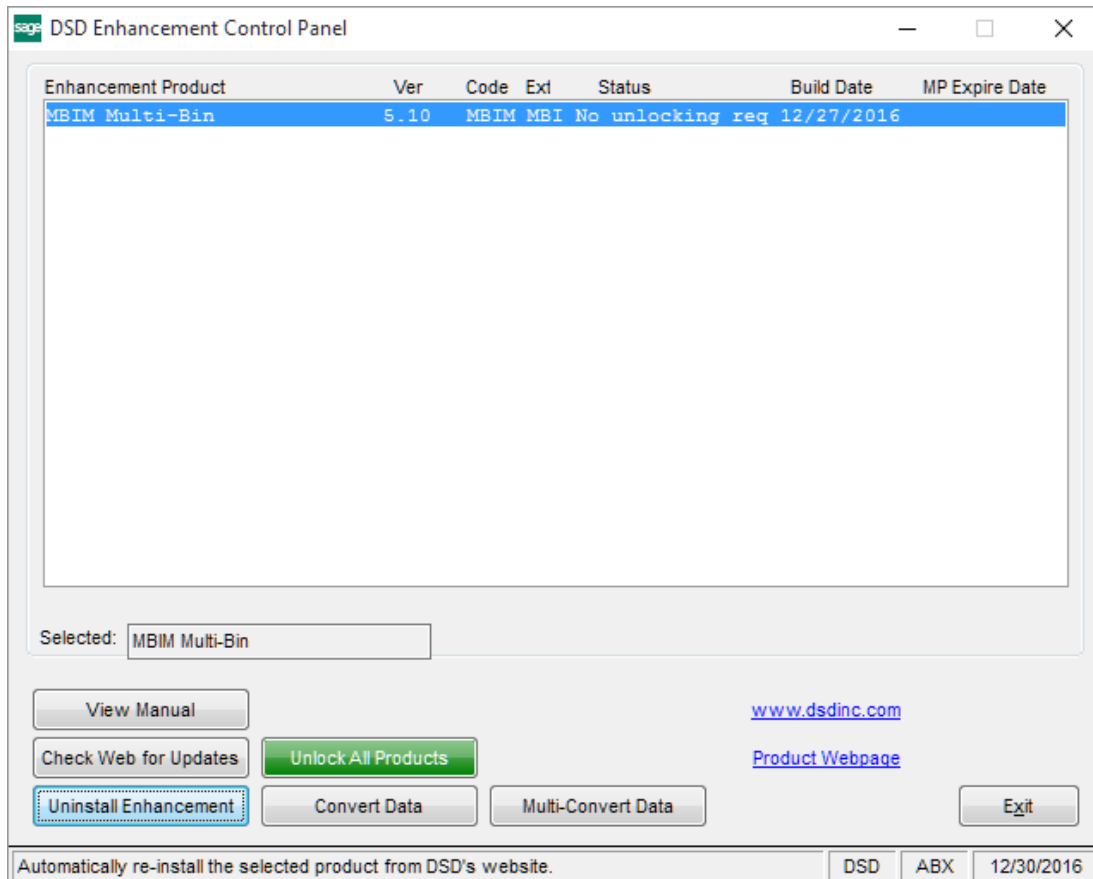
This Search Program has been added to the Inventory Management Utilities menu, and has the same functionality as the Search Panel outlined in Item Maintenance.

### ***InstaDocs Document Migration Utility***

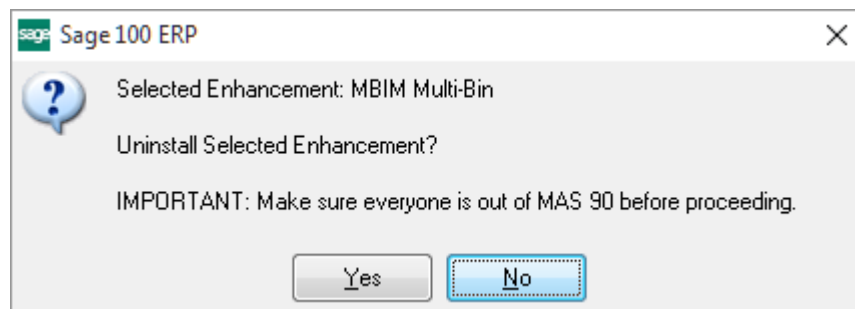
See Inventory InstaDocs User Manual.

## 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.

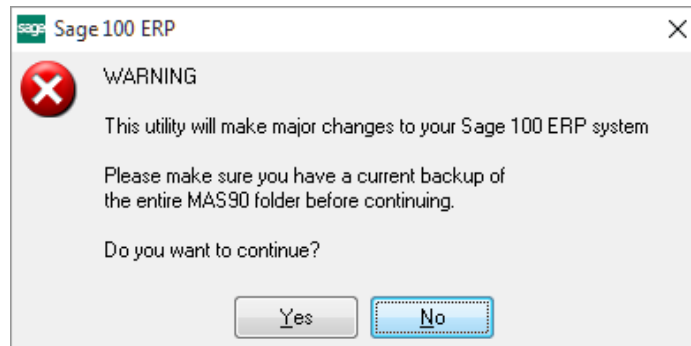


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



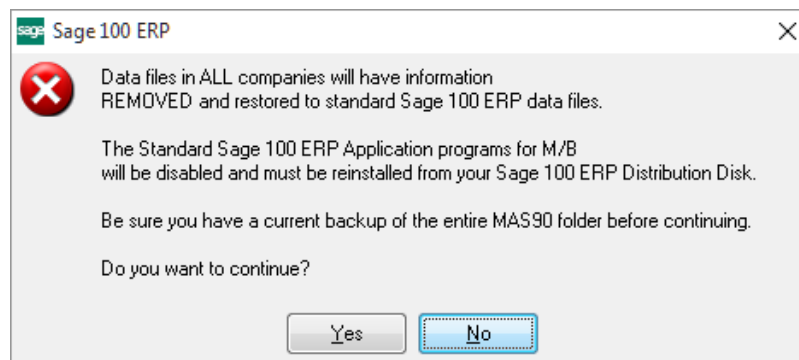
Select **No** to exit the Uninstall Process.  
Select **Yes** to continue with the Uninstall Process.

**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.

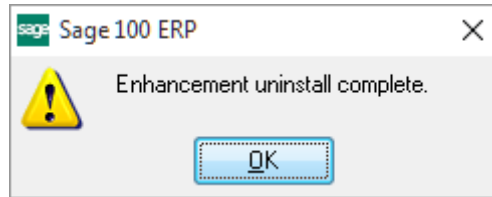
Select **No** to exit the Uninstall Process.  
Select **Yes** to continue with the Uninstall Process.

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).