



# JobOps 2013 R2 Installation Guide

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## IMPORTANT INFORMATION

JobOps 2013 R2 includes only programs for JobOps and for Sage 100 Standard ERP or Sage 100 Advanced ERP programs that JobOps modifies. Before installing this release you must first install and register the Sage 100 Standard ERP or Sage 100 Advanced ERP 2013 release *including Product Update 4 (Version 5.00.4.0)*. Please refer to the *Installation and System Administrator's Guide* for Sage 100 Standard ERP or Sage 100 Advanced ERP for instructions on how to install the Sage 100 Standard ERP or Sage 100 Advanced ERP 2013.

**\*\*\* If rebuilding the data files, per the Sage 100 Standard ERP or Sage 100 Advanced ERP instructions, do NOT rebuild the JobOps (JT) files.**

Please be sure to review the release notes for each JobOps release that is higher than your current version before installing to review the important program updates included in this release. Prior to installing, the release notes can be downloaded from the JobOps website: <http://www.jobops.com>. After installing, the release notes PDF document installs and is located in the following directory:...\mas90\JT\2013 Release Notes.pdf.

**If you have any questions regarding installation, please contact your authorized JobOps reseller, or contact the JobOps Help Desk at 1-800-815-8485.**

## SAGE 100 STANDARD ERP OR SAGE 100 ADVANCED ERP MODULE REQUIREMENTS

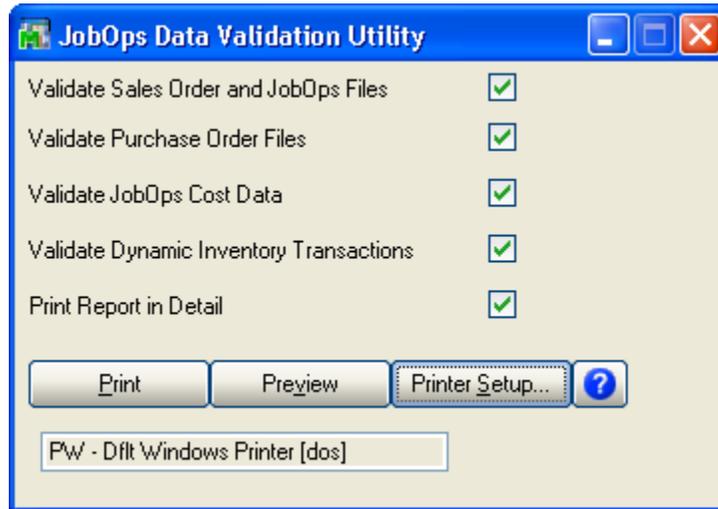
JobOps requires the Library Master, General Ledger, Accounts Receivable, Inventory Management and Sales Order Sage 100 Standard ERP or Sage 100 Advanced ERP modules to be installed prior to installing JobOps.



### BEFORE INSTALLING JOBOPS 2013 R2

Before installing JobOps 2013 General Release (R2), the following steps should be taken for a successful installation.

- ◆ **Do not install JobOps when custom modifications exist and they have not yet been retrofitted to the current version.** Please contact your JobOps reseller or the JobOps Support Desk for information on how to obtain retrofits for custom modifications.
- ◆ **Do not install JobOps when Extended Solutions or Third Party Products are installed.** Please contact your JobOps reseller or the JobOps Support Desk for information on evaluating Extended Solutions or third party software.
- ◆ **Confirm that the Sage 100 Standard ERP / Sage 100 Advanced ERP installed System 2013 Version is 5.00.4.0.** From the Sage 100 Standard ERP or Sage 100 Advanced ERP Desktop, select the File>Run option and enter \*info as the program name to run. The installed System Version is displayed in the Sage 100 Standard ERP or Sage 100 Advanced ERP System Information window.
- ◆ **Verify that all data entry files have been updated prior to installing or upgrading to a new version of JobOps:** Accounts Payable Invoice Data Entry, Accounts Receivable Invoice Data Entry and Cash Receipts Entry, Inventory Transaction Entry, Purchase Order Receipt of Goods Entry, Receipt of Invoice Entry and Return of Goods Entry, RMA Entry and RMA Receipts Entry, and Sales Order Shipping Data Entry and Invoice Data Entry, Daily Parts Usage, Daily Labor Register, Make to Stock Closing Journal, and Service Ticket Billings.
- ◆ When JobOps is already installed, run the JobOps Data Validation Utility, prior to installing an updated JobOps release. Access the JobOps Data Validation Utility from the JobOps>Reports menu (version 4.x) or the JobOps>Setup menu (prior to version 4.x). Select all options as shown in Figure 1 below. After the report prints, if error messages are reported on the JobOps Data Validation Utility, repair the data prior to installing a new level of JobOps. Contact your authorized JobOps reseller or the JobOps Support Desk for assistance with repairing any errors reported on the validation utility log. Back up your MAS 90 or MAS 200 data files, prior to repairing any data.



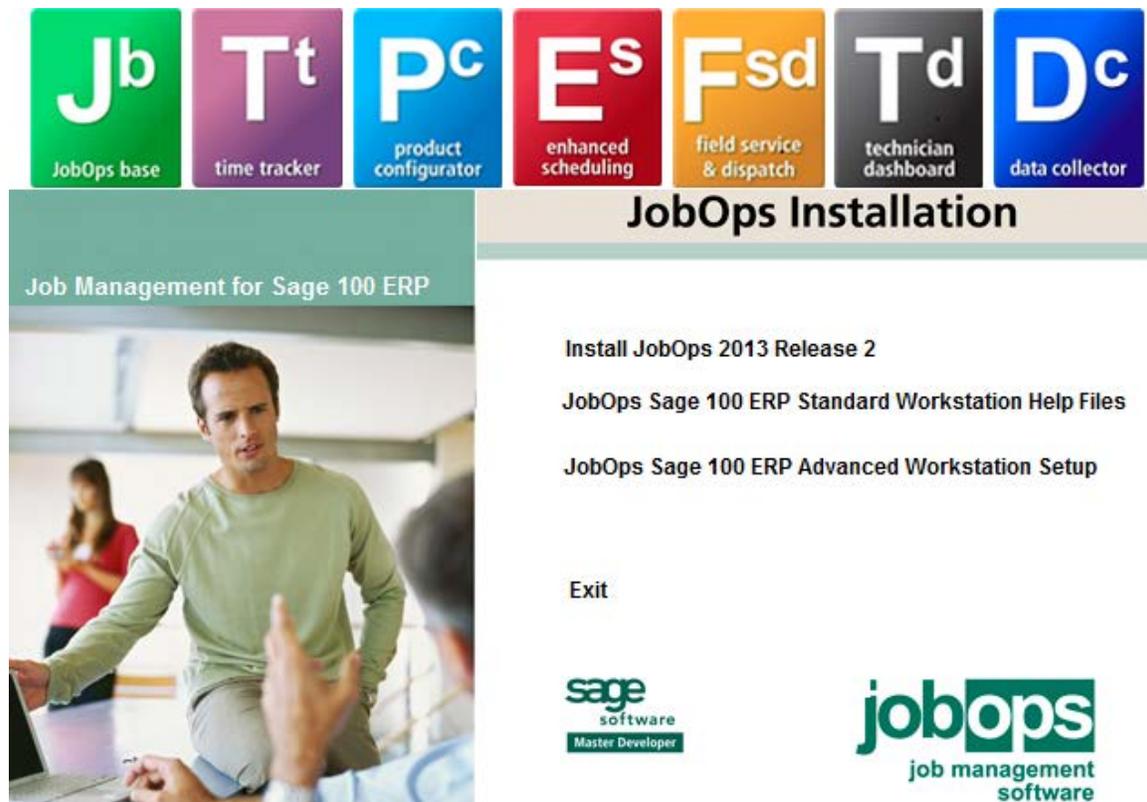
***Figure 1: JobOps Data Validation Utility***

- ◆ After all data entry files are updated and no validation utility errors are reported, backup your entire Sage 100 Standard ERP or Sage 100 Advanced ERP system including programs and data prior to installing the JobOps 2013.

## INSTALLING JOBOPS 2013 R2

The following installation steps should be followed only after Sage 100 Standard ERP or Sage 100 Advanced ERP version 2013 has been installed (or is already installed), *with Product Update 4*.

1. Double click the JobOps\_2013\_Release2.exe file that was downloaded from the JobOps website. The JobOps Autorun window should automatically display.
2. From the JobOps 2013 Release 2 Autorun window, shown in Figure 2, select the *Install JobOps 2013 Release 2* option.



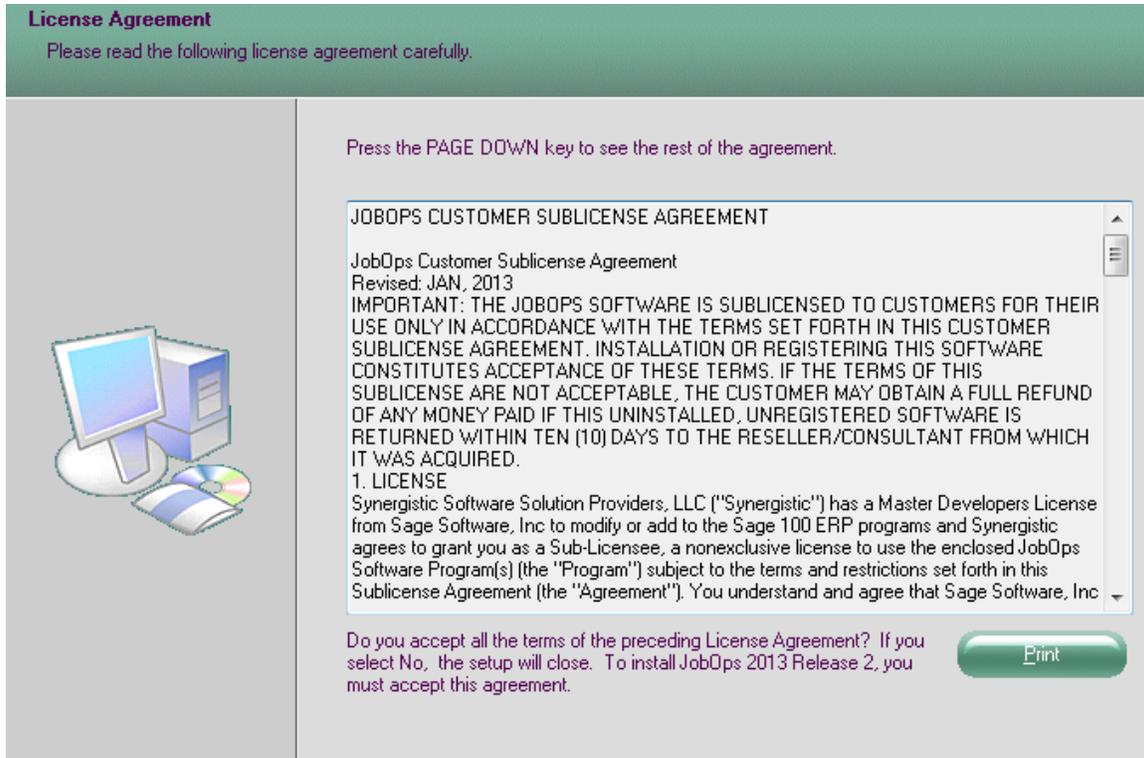
*Figure 2: JobOps Autorun Window*

3. Verify that all Windows programs have been closed and then select the *Next* button in the JobOps 2013 Release 2 – InstallShield Wizard, shown in Figure 3.



***Figure 3: JobOps InstallShield Wizard***

4. Read the JobOps Customer Sublicense Agreement and then select the *Yes* button in the window shown in Figure 4.

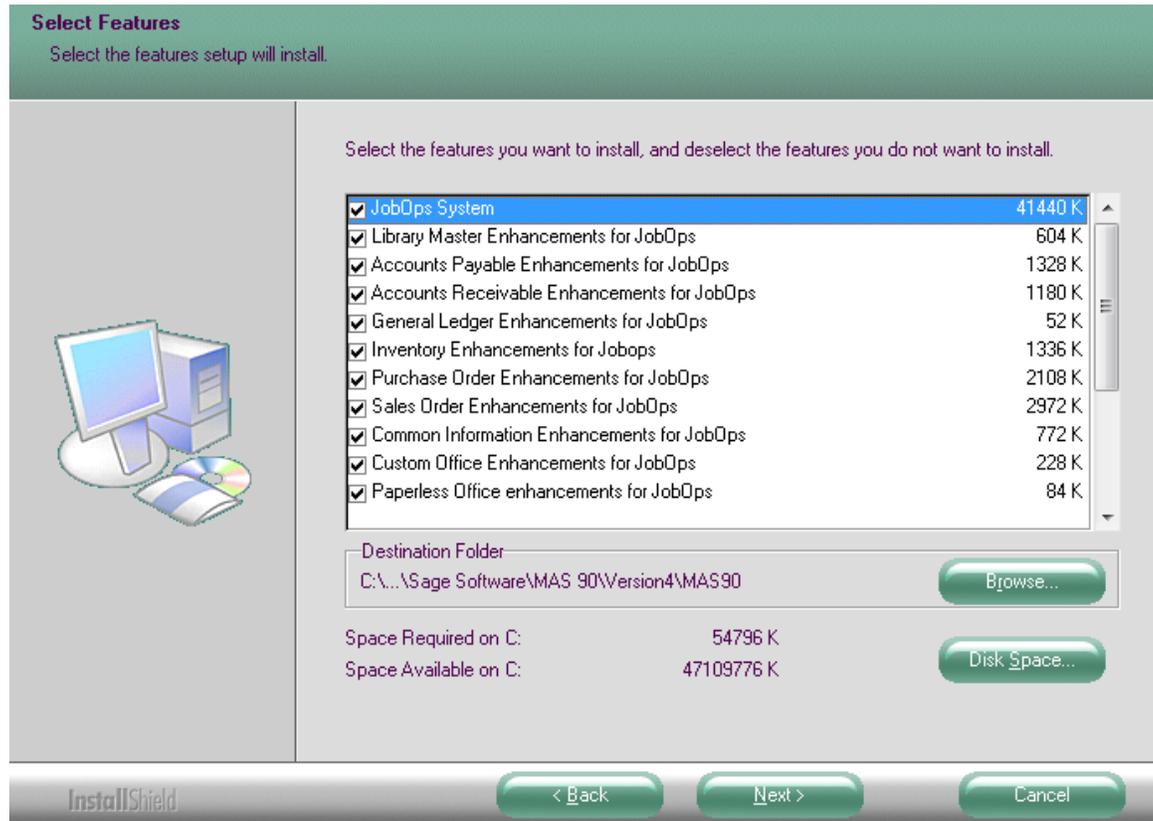


**Figure 4: JobOps Customer Sublicense Agreement**

5. Select the features to install. Select the JobOps module **AND** all the other features for which you have the corresponding Sage 100 Standard ERP or Sage 100 Advanced ERP modules installed, as shown in Figure 5.

**!Warning**

JobOps 2013 R2 must be installed to the same directory where Sage 100 Standard or Advanced ERP 2013 is installed.

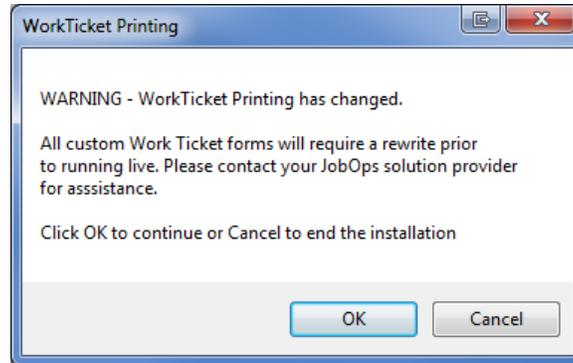


**Figure 5: Select Features**

**Important Note:** After you select destination folder and click the Next button to continue with the installation, the installed version of Sage 100 Standard ERP or Sage 100 Advanced ERP is validated.

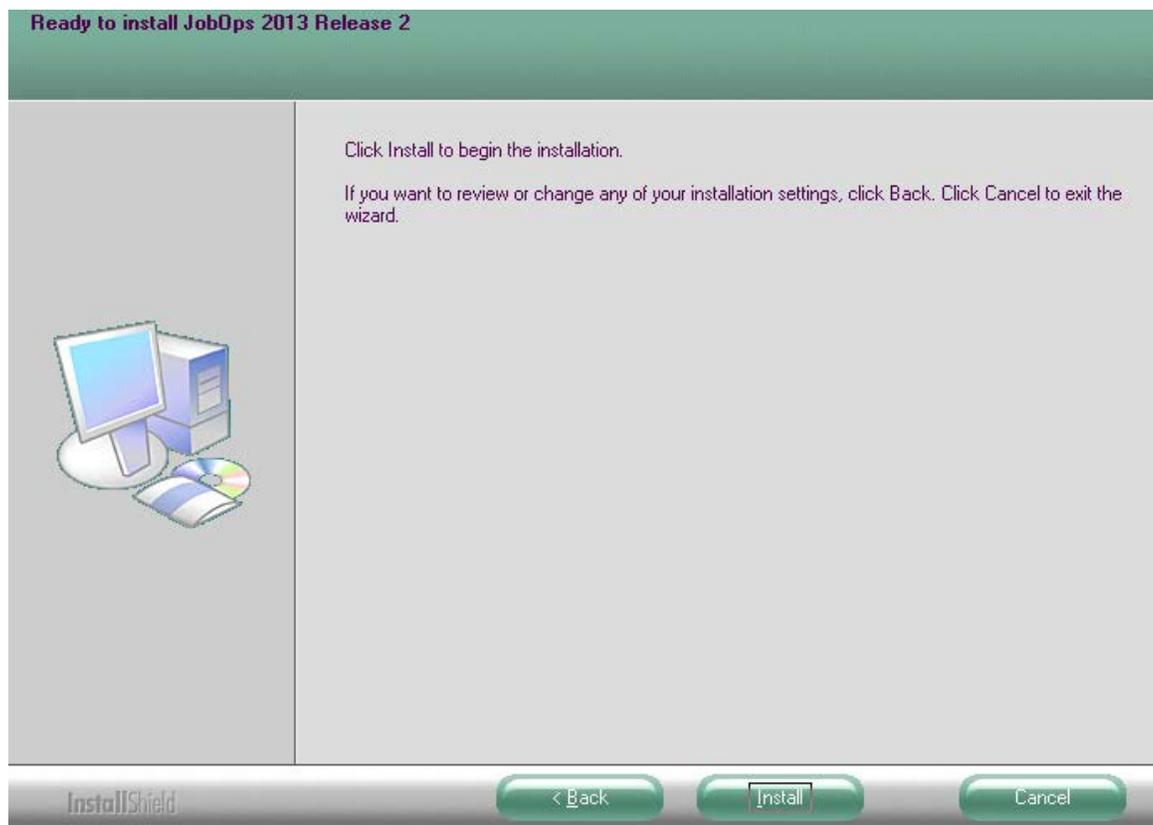
6. Accept the default Destination Folder where Sage 100 Standard ERP or Sage 100 Advanced ERP is installed, or select the *Browse* button to locate the path where Sage 100 Standard ERP or Sage 100 Advanced ERP is installed. Select the *Next* button in the window shown to continue with the installation.

- The following message will be displayed as a reminder that any custom Work Ticket forms will need to be rewritten using the new crystal file work file before going live.



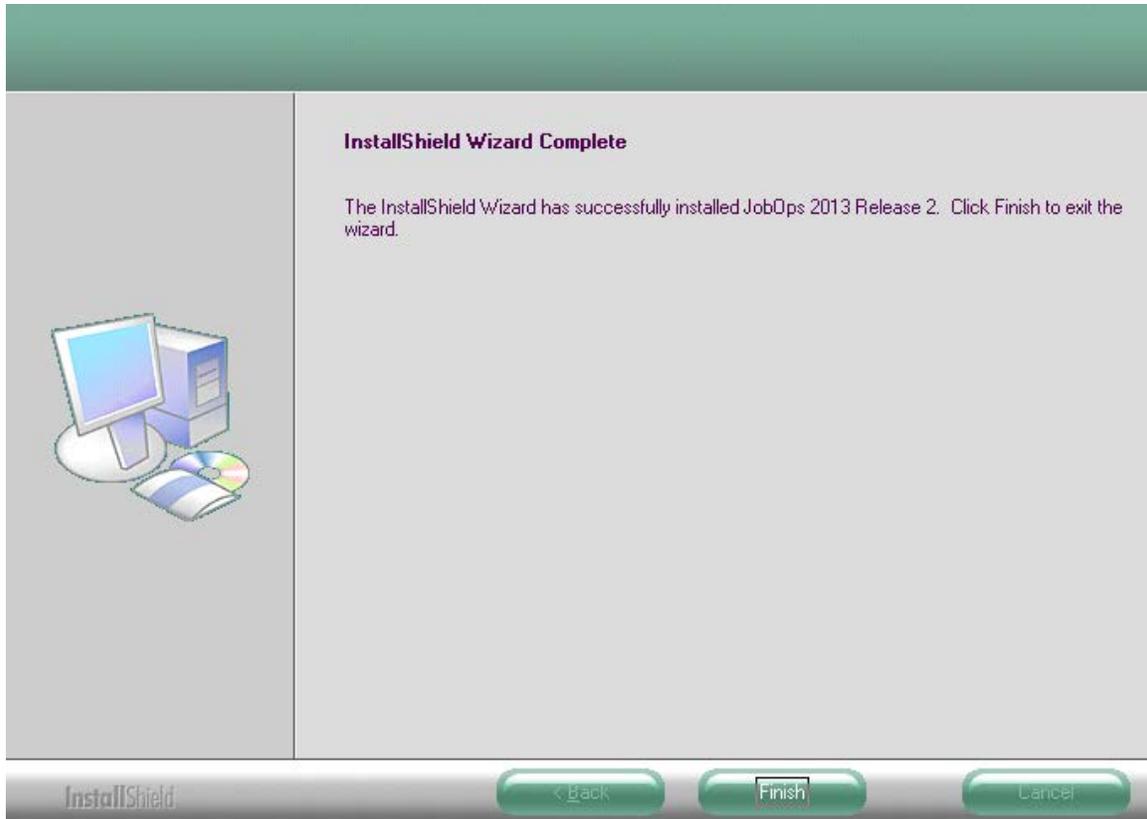
Selecting the Ok button will proceed with installation.  
 Selecting the Cancel button will terminate the installation.

- Select the *Install* button to continue with the installation. Select the *Back* button to return to the Select Features window to change the selected modules.



**Figure 6: Ready to Install JobOps 2013R2**

- After the selected features are installed, select the *Finish* button in the InstallShield Wizard Complete window shown in Figure 7.



*Figure 7: InstallShield Wizard Complete*

## INSTALLING SAGE MAS SALES TAX POWERED BY AVATAX

Upon completion of the JobOps installation, MAS Sales Tax powered by AvaTax can be installed.

Install Sage MAS Sales Tax Powered by AvaTax according to the installation instructions provided to you by Avalara.



## WORKSTATION SETUP

### JobOps Sage 100 Standard ERP Workstation Help Files

1. After you have completed the installation of JobOps 2013 R2, the JobOps Sage 100 ERP Standard or Advanced Workstation Help Files should be run for each workstation using Sage 100 ERP to install the most current JobOps help files and file layouts to the client. You can run this program from your network installation of Sage 100 ERP or from the JobOps 2013 R2 Installation Zip file.

**Running JobOps Sage 100 ERP Workstation Help Files from your network.**  
Select the *setup.exe* program from your `..\mas90\JT_90WKSetup` folder.

**Running JobOps Sage 100 ERP Workstation Help Files from the JobOps Installation CD.** Select the *JobOps Sage 100 Standard ERP Workstation Help Files* or *JobOps Sage 100 Advanced Workstation Setup* installation option as shown in Figure 8 below.

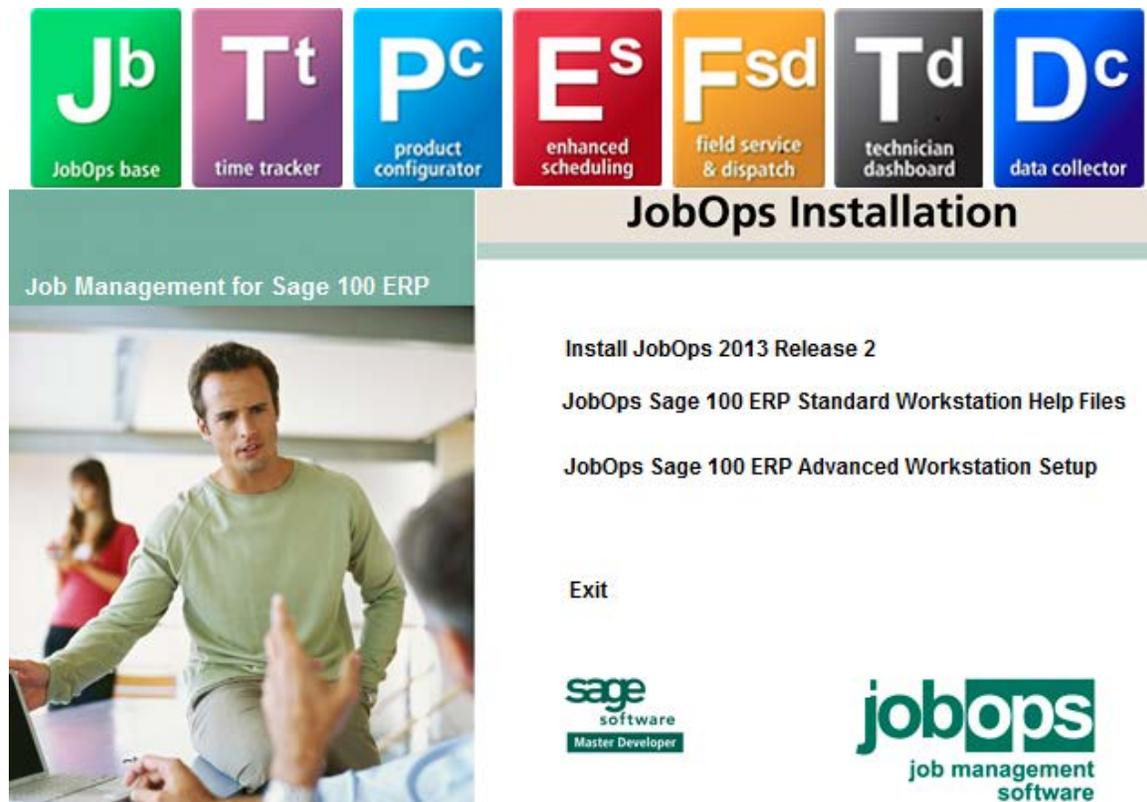
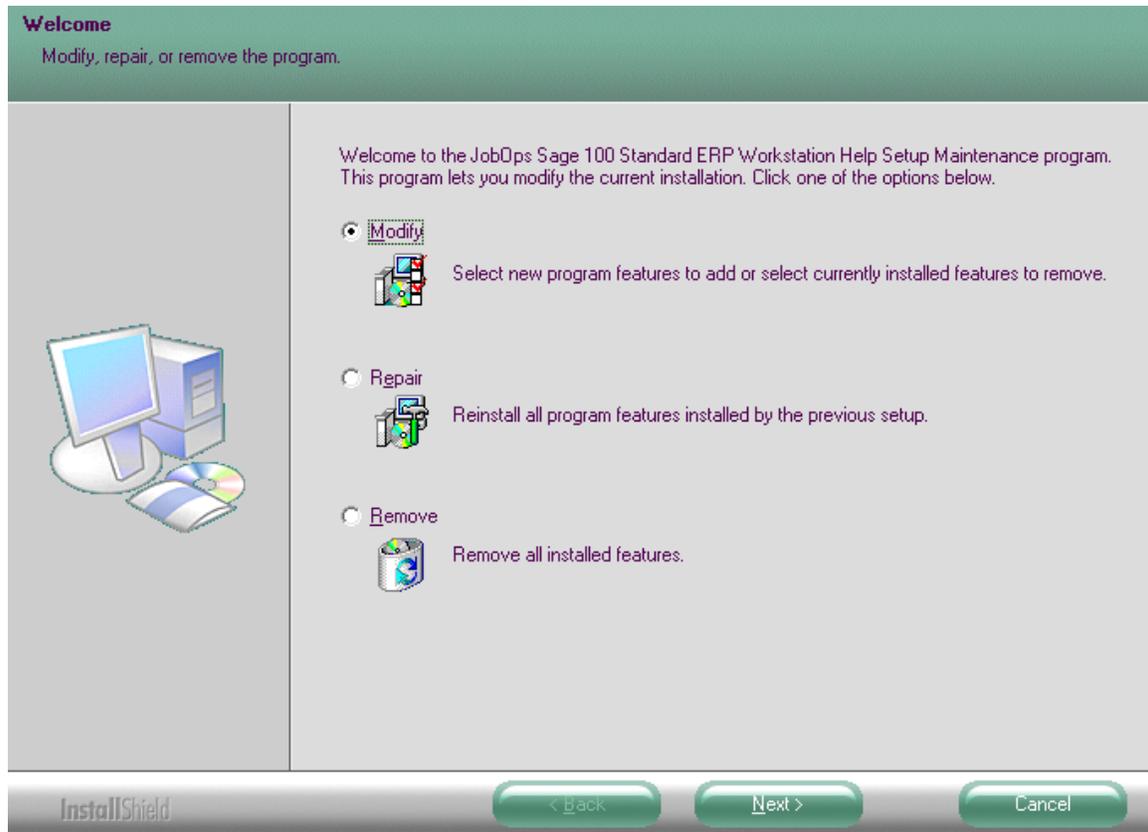


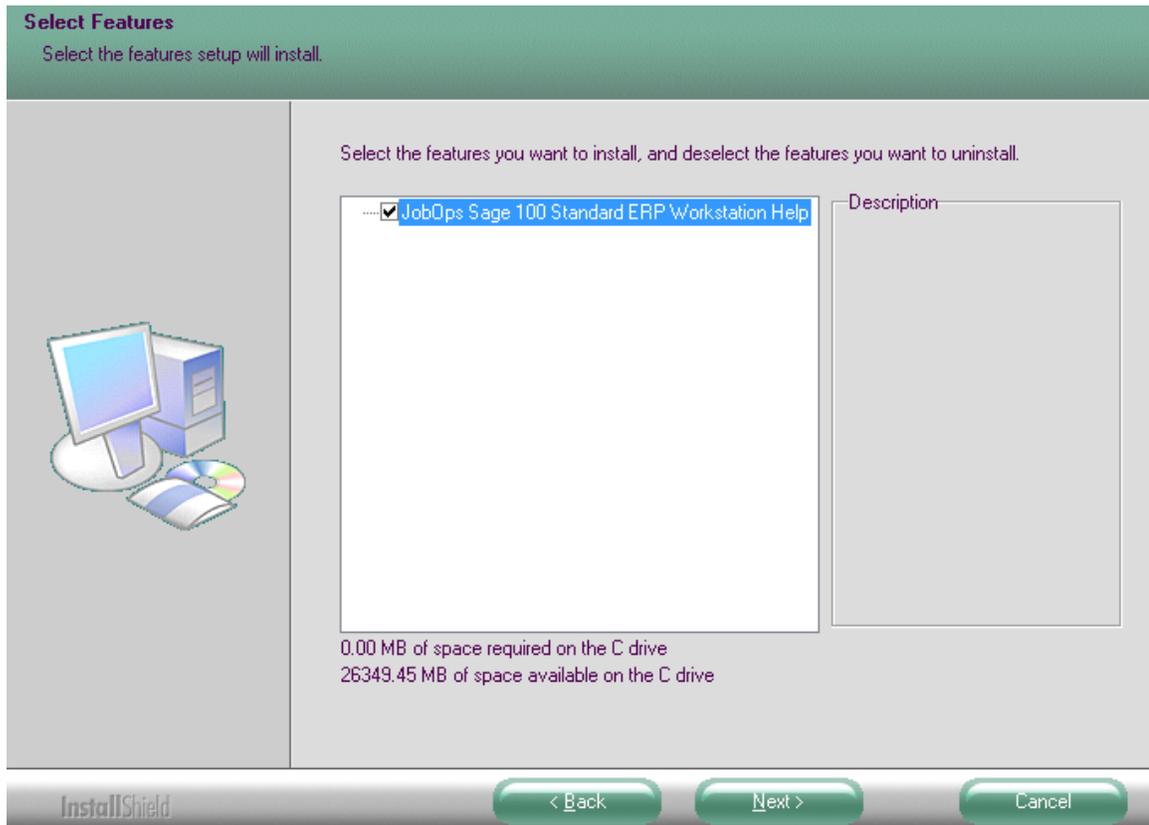
Figure 8: JobOps Autorun Window

2. Follow the instructions in the JobOps Sage 100 Standard ERP Workstation Help – InstallShield Wizard to complete the installation, as shown in Figures 9 and 10 below.



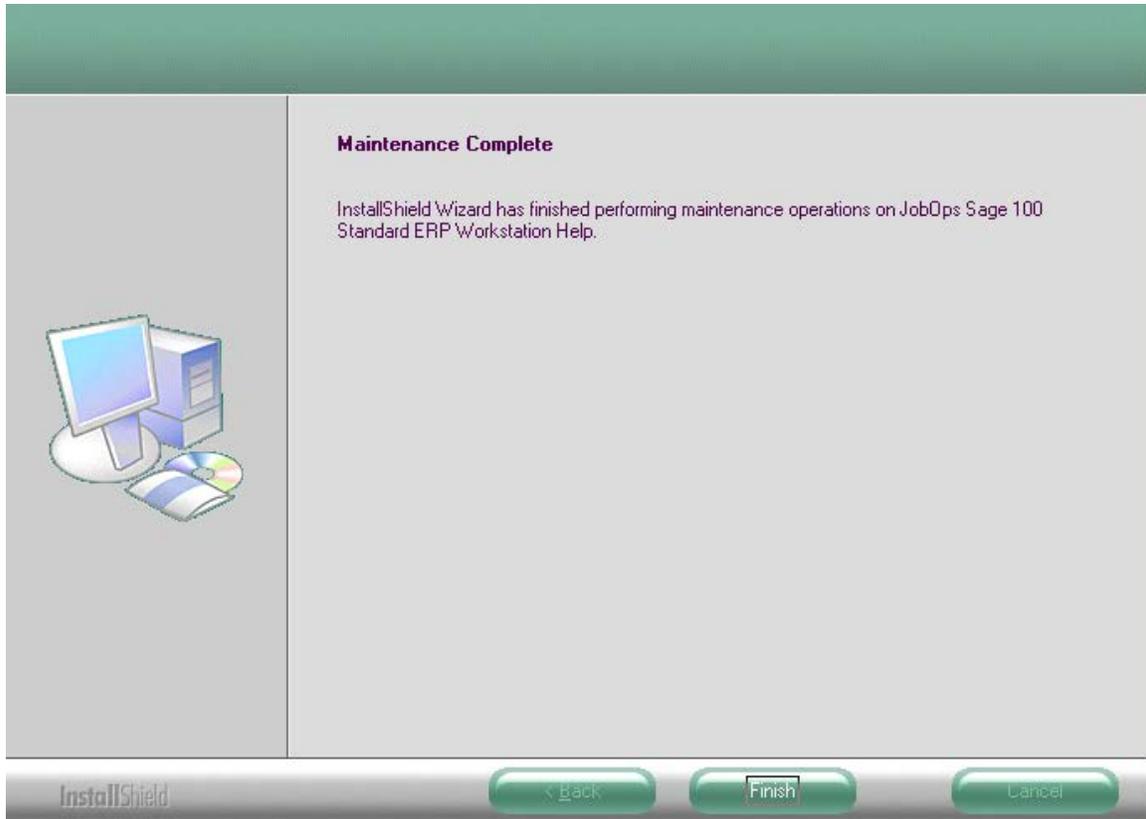
**Figure 9: JobOps Sage 100 ERP Workstation Help – InstallShield Wizard**

3. Accept the default Destination Folder where Sage 100 ERP Standard / Advanced is installed, or select the *Browse* button to locate the path where Sage 100 ERP Standard / Advanced is installed. Select the *Next* button in the window shown to continue with the installation.



**Figure 10: InstallShield Wizard – Select Features**

4. After the selected features are installed, select the *Finish* button in the InstallShield Wizard Complete window shown in Figure 11.



**Figure 11: InstallShield Wizard Complete**

## ACTIVATING JOBOPS

### JobOps Activation

The JobOps module must be activated and company data files must be created for each company in your Sage 100 Standard ERP or Sage 100 Advanced ERP installation which utilizes the Sales Order module, **regardless of whether JobOps will be used in the company** because JobOps has modified many Sage 100 Standard ERP/Sage 100 Advanced ERP programs and all companies read the same set of programs.

**Note:** You must select to activate the Sales Order module when also activating the JobOps module (when the Sales Order module is not already activated).

Access Company Maintenance from the Library Master>Main menu and enter the appropriate Company code. Select the *Activate* button and select JobOps from the Activate Module list, as shown in Figure 17 below.



*Figure 17: Activate Module*

## Create JobOps Company Data Files: New Installation

Company data files must be created the first time JobOps is installed in a Sage 100 Standard ERP or Sage 100 Advanced ERP installation, or after a new company has been created and data files have been created for the General Ledger, Accounts Receivable, Inventory Management and Sales Order modules.

When accessing the JobOps module before the Sales Order module data files are created, the following message appears.



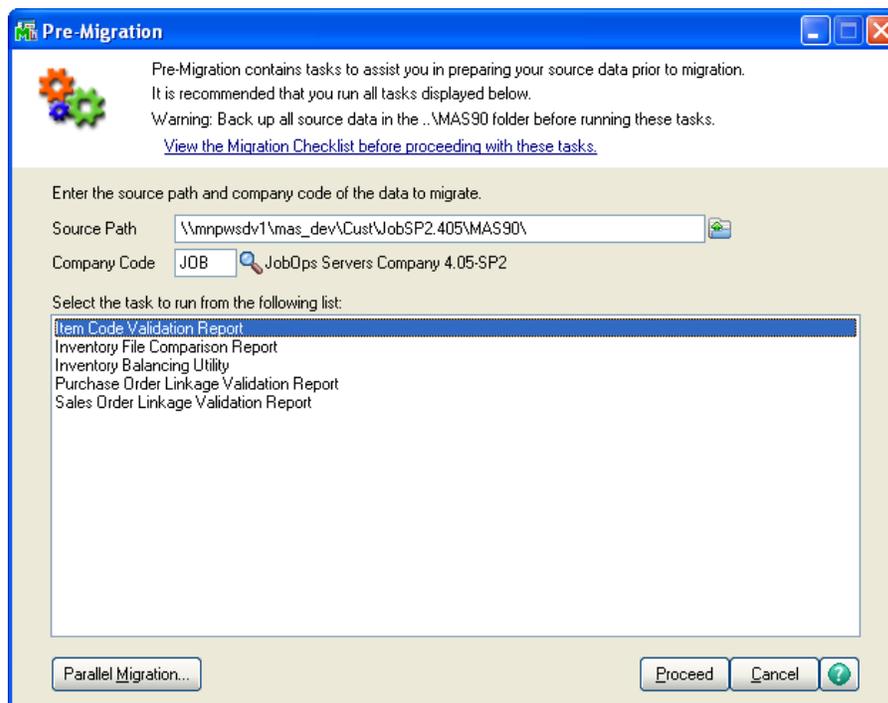
You must set up the required Sales Order data files prior to setting up the JobOps module data files. Access any task in the Sales Order module to set up the module and to activate the Sales Order Setup Wizard.



## UPGRADING FROM A PREVIOUS RELEASE OF JOBOPS (PRE 2013 VERSIONS)

*If upgrading from a previous version of JobOps that is 4.30R3M or below, please follow the steps below regarding installation and data conversion. It is important that these steps are followed to ensure that existing JobOps data is converted properly.*

1. Install Sage 100 Standard ERP or Sage 100 Advanced ERP version 2013
2. Install Product Update 2 for Sage 100 Standard ERP or Sage 100 Advanced ERP
3. Install the following Sage Hot Fixes for 2013 PU2 (optional)
  - LM5003-T
  - AP5001-T
  - AR5002-T
4. Install JobOps 2013 R2
5. Launch Sage 100 Standard ERP or Sage 100 Advanced ERP
6. Access Pre-Migration program from Library Master / Utilities Menu
7. Select Source Path of your current installation, then the Company Code to review





## Installation Instructions

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8. Depending on which version of Sage 100 Standard ERP or Sage 100 Advanced ERP you are converting from you will see Purchase Order Linkage Validation Report and/or Sales Order Linkage Validation Report. Run these utilities on all JobOps related companies.
9. Once the Pre-Migration has been validated and all data corrected the Parallel Migration process is ready to begin. Follow Sage Software instructions for performing the Migration from previous versions of Sage 100 Standard ERP or Sage 100 Advanced ERP to version 2013 Release. **\*\*\*If rebuilding files per Sage 100 Standard ERP or Sage 100 Advanced ERP installation instructions, do NOT rebuild JobOps (JT) files.**
10. Upon completion of the parallel migration of your data over to the new Sage 100 Standard ERP or Sage 100 Advanced ERP 2013 release you must re-install JobOps 2013 R2 prior to performing any data conversions.
11. Once the JobOps 2013 R2 Installation steps have been repeated after the parallel migration, remember to backup your entire data set before proceeding to company conversion.
12. Prior to actual conversion processing for companies converting **from 4.10 or higher**, remove the JT0xxx.SOA file from the MAS90\JTxxx directory, where xxx represents the company code being converted. Performing this will ensure that the J/T module will not be reactivated and prevents the JT.Notsetup folder from being created.
13. If panel customizations exist after the conversion is finished, access Custom Office Utilities Menu and run Update Customized Panels to Current Level.

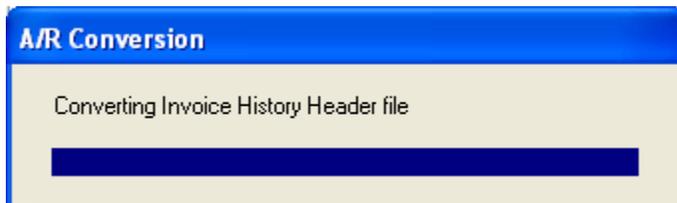
## CONVERTING JOBOPS DATA FILES (2013 VERSION)

After JobOps 2013 R2 is installed on an existing Sage 100 ERP 2013 installation, a data conversion must be invoked in order to begin using the Sales Order and JobOps modules. For each company, you must convert the data files from Company Maintenance and by accessing JobOps Options.

If you do not invoke the conversion, you will be required to do so when trying to access certain JobOps functions. The following message displays.



To convert the data from JobOps Options, access JobOps Options from the JobOps>Setup Menu. The conversion automatically begins. Each module that requires conversion is displayed, as in the example shown below.

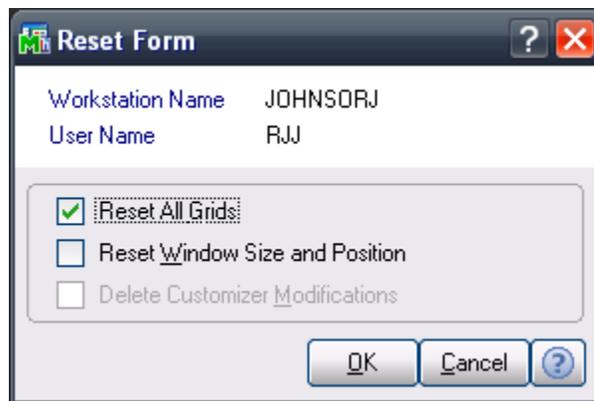


When the data conversion is complete, the JobOps Options window displays. Select the Accept button to exit JobOps Options.

## UPDATING SALES ORDER ENTRY PANELS

After installing JobOps on an existing Sage 100 ERP Standard or Advanced installation, the Sales Order Entry and Sales Order Invoice Data Entry grid panels will need to be updated in order to view and access JobOps fields. The following steps are required.

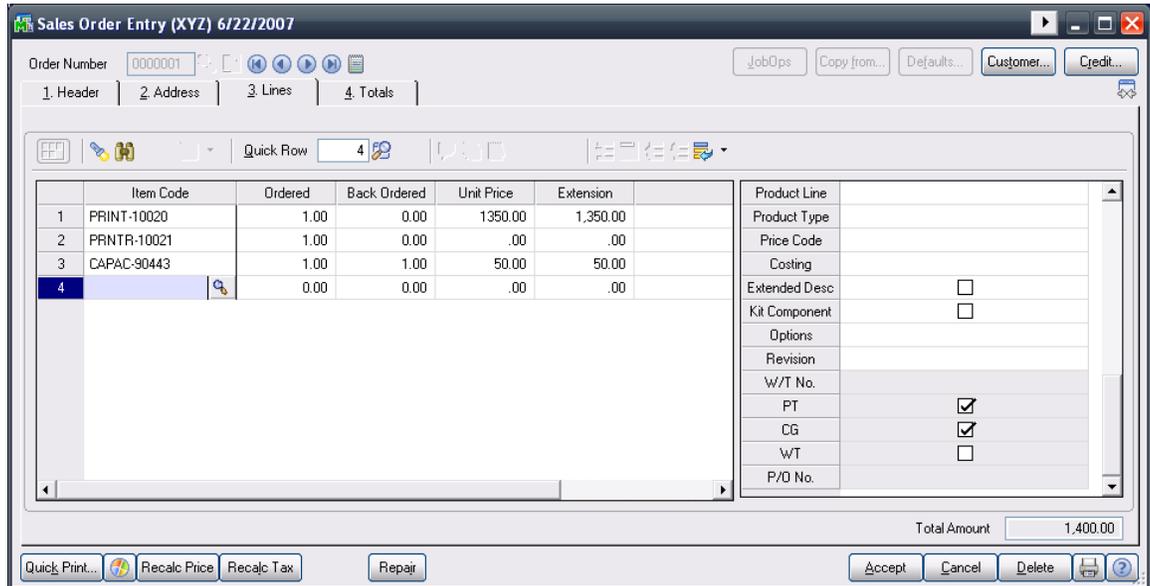
1. Access Sales Order Entry
2. Access the Lines Tab, where the Entry Grid resides
3. Place the mouse in the grid and right click. A menu will appear with the following options:
  - a. System Info
  - b. Panel Settings
  - c. Related Tasks
4. Select Panel Settings – Reset Panel
5. Select the Reset All Grids Option and select OK



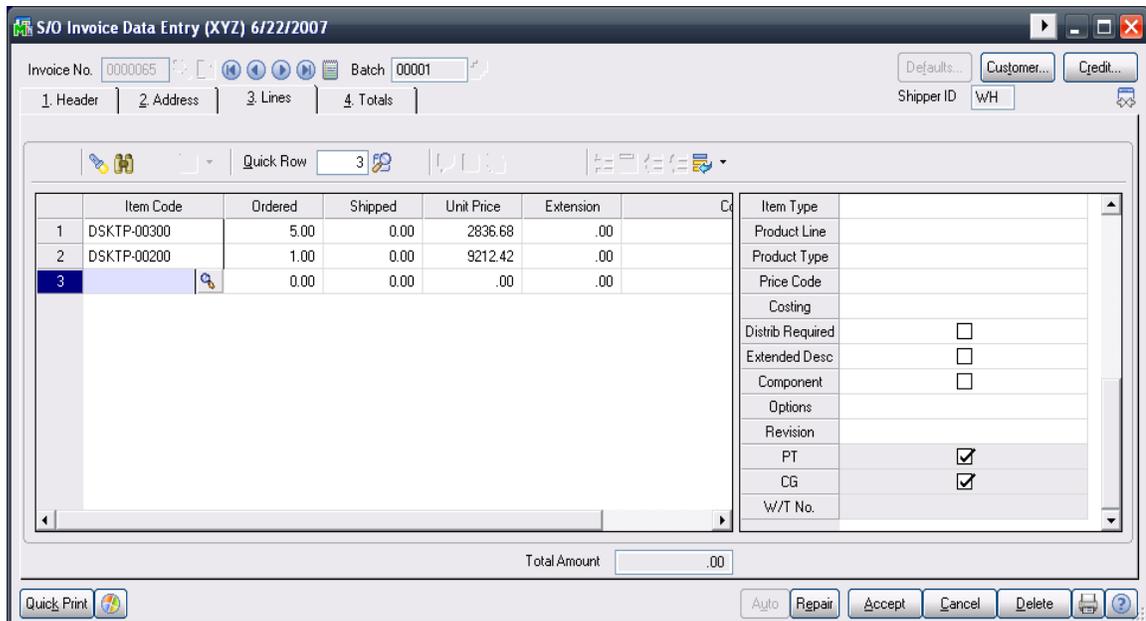
6. Select OK from the displayed message box and close out of Sales Order Entry



7. Access Sales Order Entry
8. Access the Lines Tab, note that the following fields are now visible: W/T No., PT, CG, WT and P/O No.



9. Repeat Steps 1-6 from Sales Order Invoice Data Entry
10. Access Sales Order Invoice Data Entry
11. Access the Lines Tab, note that the following fields are now visible: PT, CG and W/T No.





## REGISTERING JOBOPS

When upgrading to JobOps 2013 – 5.00 R2, new registration keys **are** required for all installations that are upgrading from 4.50 RDuke and below.

**A JobOps Registration Form must be filled out and submitted in order to obtain JobOps registration numbers.**

### JobOps Registration Form

The registration form is located on the JobOps website at <http://jobops.com/>. In order to request product registration keys you will be required to log in to the JobOps website.

After logging in, select the Keys tab to access the registration form.

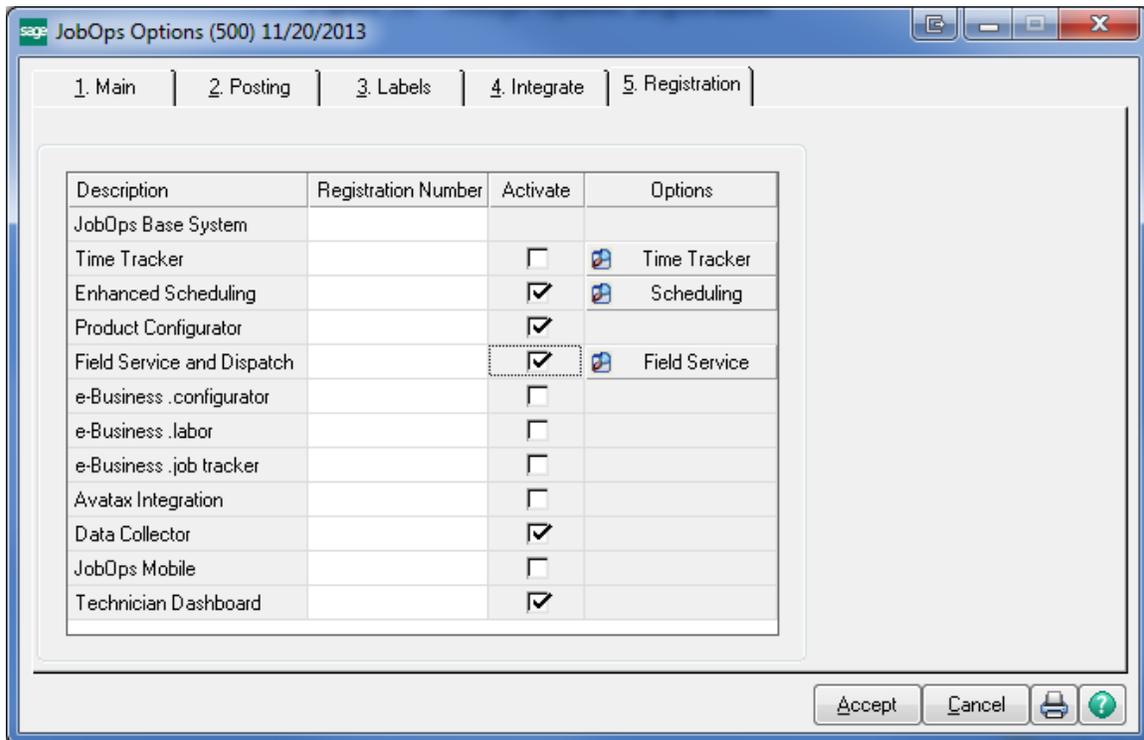
The screenshot shows the JobOps website navigation menu with the 'Keys' tab highlighted. Below the menu is the 'Register JobOps' form with the following fields:

- Company Name: \*
- Contact Name: \*
- Primary Contact E-mail (JobOps unlocking keys will be sent to this address): \*
- Primary Contact Phone:
- Sage 100 ERP System Setup Serial Number: \*
- Last 4 characters of the Sage 100 User Key found under System Configuration: \*
- Sage 100 ERP System Type: \* (dropdown menu with '- Select -')



## Installation Instructions

Once you have obtained your registration numbers, access JobOps Options from the JobOps>Setup menu. Select the Registration tab to enter your registration numbers. Select the Activate checkbox for each module being registered except the JobOps Base System. The JobOps Options Registration window is displayed in Figure 18 below.



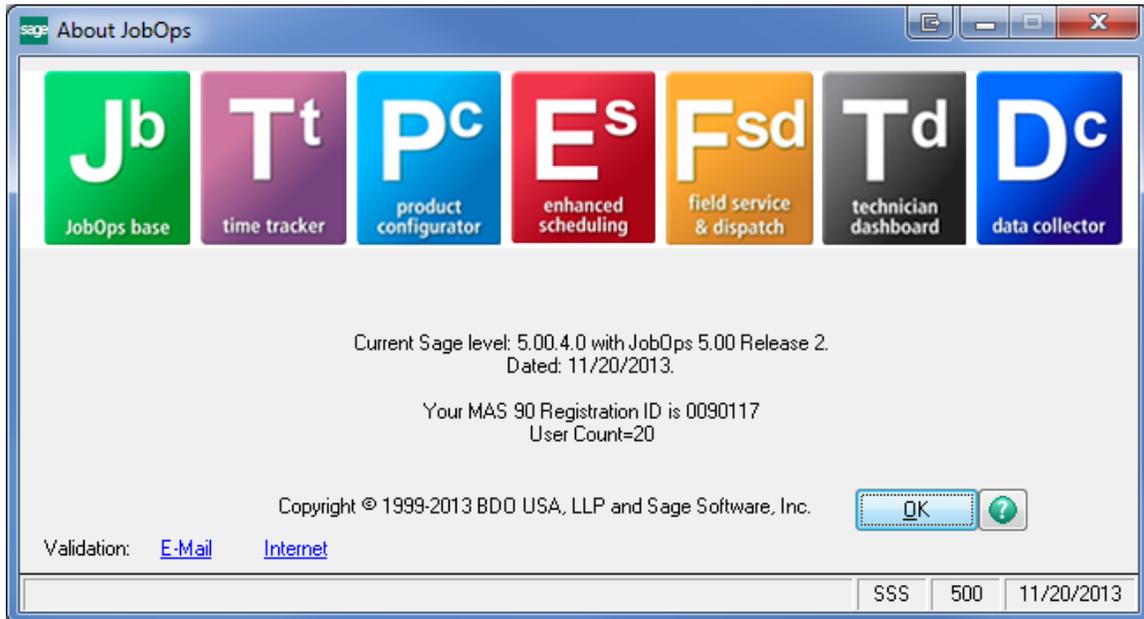
*Figure 18 – JobOps Options Registration*



## Installation Instructions

### ABOUT JOBOPS

The About JobOps screen provides the current version of JobOps that is installed as well as the release date.



There are 2 hyperlinks, E-mail / Internet, located on the About JobOps screen that will email your version information to JobOps support.

The information that is emailed is the Date/Company Name/MAS 90 Registration ID/JobOps version and release date/random number:

11-20-13|Synergistic\_Software\_Solutions|1231235.00GR\_20131120

This information is updated to the client record and is used if a support call is placed on behalf of the client, providing the support team with up to date version information.