Purchase Agent 2019 Installation Guide

Warning: Complete the Pre-Installation Check List before installing the Purchase Agent 2019 module.

Important Information

The Purchase Agent 2019 installation includes Sage 100 and Purchase Agent programs that have been modified for the Purchase Agent module.

Note: Purchase Agent is a standalone module for Sage 100 that does not require JobOps/Sage 100cloud Manufacturing.

The following steps must be conducted before installing the Purchase Agent 2019 module.
- Install and register Sage 100 Standard 2019, Sage 100 Advanced 2019 or Sage 100 Premium 2019 (6.10.0.0)
- Install Sage 100 2019 and/or
- Install Sage 100 2019 Product Update 1 or greater. Purchase Agent 2019 may be installed when any Sage 100 2019 Product Update is installed.

Note: Refer to the Sage 100 Installation and System Administrator's Guide for information on installing Sage 100 Standard 2019, Sage 100 Advanced 2019 or Sage 100 Premium 2019 and Product Updates.

Purchase Agent and Sage 100 Modules

The following Sage 100 modules are required to be installed, activated and set up in order to use the Purchase Agent module.
- Library Master
- General Ledger
- Inventory Management
- Accounts Payable
- Purchase Order
- Accounts Receivable
- Sales Order

The following Sage 100 modules may be installed and activated but are not required to be installed in order to use the Purchase Agent module.
- Bill of Materials
- Work Order
- Material Requirements Planning

Note: A new registration key must be obtained in order for Purchase Agent to review Work Order information.

Pre-Installation Check List

Before installing Purchase Agent 2019, the following steps must be completed to ensure a successful installation.

☐ Do not install Purchase Agent 2019 when custom modifications exist on Sage 100 or JobOps/Sage 100cloud Manufacturing modules. Custom modifications must be retrofitted to the current Sage 100 or JobOps version. Please contact your JobOps/Sage 100cloud Manufacturing partner or JobOps/Sage 100cloud Manufacturing Sales at sales@jobops.com for information on evaluating extended solutions or third party software.

☐ Do not install Purchase Agent 2019 when Extended Solutions or Third Party Products are installed on the Sage 100 system. Please contact your JobOps/Sage 100cloud Manufacturing partner or JobOps/Sage 100cloud Manufacturing Sales at sales@jobops.com for information on evaluating extended solutions or third party software.

☐ Confirm that the Sage 100 2019 version is 6.10.0.0, 6.10.1.0 or 6.10.2.0 for the Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium.

Access Help menu > About Sage to review the currently installed Sage 100 version. To review additional information on the currently installed Sage 100 system in the Sage 100 System Information window, select File menu > Run. Enter *info* in the Program field. Select the OK button.

Note: Purchase Agent 2019 is compatible with Sage 100 2019 and all Sage 100cloud 2019 Product Updates.

☐ Obtain a registration key for Purchase Agent 2019. When upgrading from a prior version, do not install Purchase Agent 2019 without first acquiring a new registration key. Refer to the Registering Purchase Agent 2019 section in the installation guide for more information on how to obtain a Purchase Agent 2019 registration key.

Note: Please allow 1-3 business days for processing a Purchase Agent 2019 registration key request.

☐ Backup the entire Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium system, including programs and data files before installing Purchase Agent 2019.

Migrating Data to Sage 100 2019 and Purchase Agent 2019

The following steps must be conducted when migrating to Sage 100 2019 and the Purchase Agent module is installed.

☐ From the Pre-Migration window, enter the Source Path of the current Sage 100 installation and the company code to migrate.

☐ Run the pre-migration tasks for all related companies. The listed pre-migration tasks are dependent on the Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium version being migrated from.

☐ Conduct the Parallel Migration process after all pre-migration tasks are completed and all data issues are corrected. Refer to Sage 100 instructions for more information on performing the migration process.

☐ Purchase Agent 2019 must be re-installed prior to performing data conversions after the parallel migration process to Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium 2019 is successfully completed.

☐ Conduct the data file conversion process.

☐ After the conversion process is completed, access the Custom Office Utilities Menu and run the Update Customized Panels to Current Level process when panel customizations exist.

Registering the Purchase Agent Module

A new registration key is required when upgrading to Purchase Agent 2019. Follow the following steps to obtain a new Purchase Agent 2019 registration key.

How to Obtain a Purchase Agent 2019 Registration Key

1. Access www.thepurchaseagent.com.

2. Select the Registration Keys tab.

3. Enter the required information on the Purchase Agent registration form.

Register Purchase Agent

Company Name: *

Contact Name: *

Primary Contact E-mail (unlocking keys will be sent to this address): *

Primary Contact Phone:

Sage 100 System Setup Serial Number: *

Last 4 characters of the System_Setup User Key (e.g. 2EC2): *

Sage 100 System Type: *
- Select - ▼

Sage Version: *
◉ 2018
○ 2017

Comments:
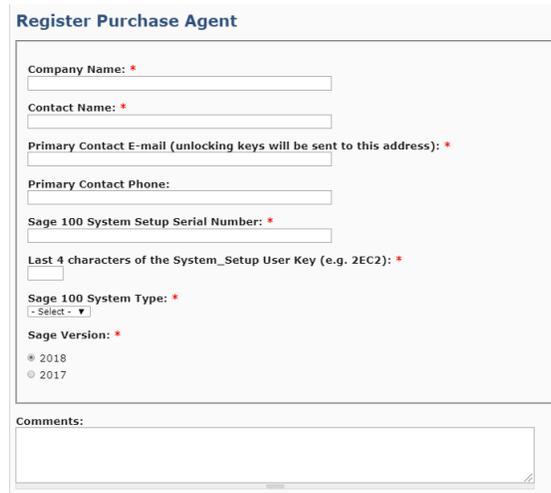
Note: All fields on the form that contain an asterisk * are required information in order to receive a Purchase Agent registration key.

4. Select the **Submit** button. An email response to acknowledge the request is sent to the email address assigned to the Primary Contact E-mail field on the Purchase Agent registration form.

Note: Please allow 1-3 business days for processing a Purchase Agent registration key request. Purchase Agent registration keys are sent to the email specified in the Primary Contact E-mail field on the Purchase Agent registration key request form.

Warning: If an email response acknowledging the request or an email containing the Purchase Agent registration key is not received within 1-3 business days, please contact JobOps Support at (800) 815-8485 or support@jobops.com.

How to Register the Purchase Agent 2019 Module

1. After receiving a Purchase Agent registration key and installing Purchase Agent 2019, access and log onto Sage 100.

2. Select Purchase Order Main menu > Purchase Agent from the Sage 100 menu.

3. The Purchase Agent registration window automatically displays when a registration key has not been assigned to the Purchase Agent module. Enter a key in the Registration Key field.
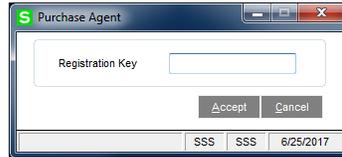
Select the Accept button to register the Purchase Agent module and to access the Purchase Agent Selection window.

Note: Refer to the Purchase Agent 2019 User Guide for more information on assigning a registration number and using the Purchase Agent module.

How to Install Purchase Agent 2019

1. Download the purchaseagent2019.exe file from the Downloads page on the Purchase Agent website.

2. Right click on the Purchase Agent executable file.

3. Select Run as administrator.

4. Select the Next button from the Purchase Agent 2019 welcome window.
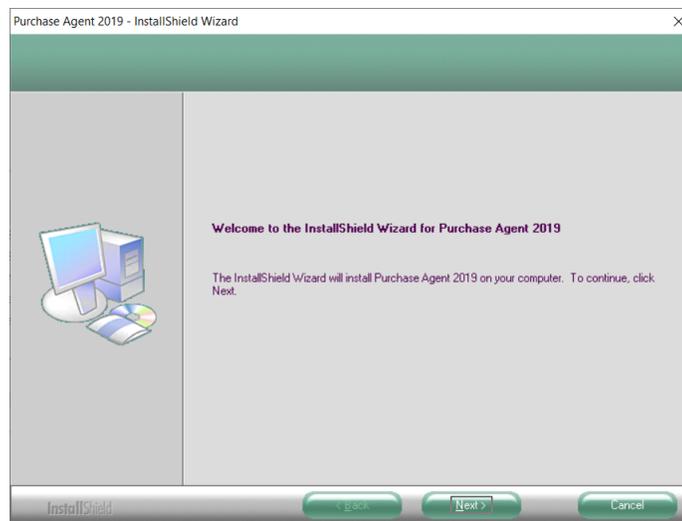
5. Review the Purchase Agent Customer Sublicense Agreement.
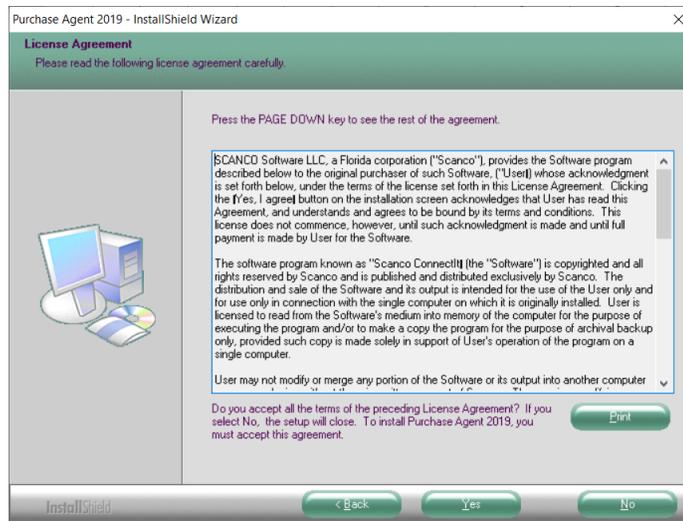
6. Select the Yes button to agree to the Purchase Agent Customer Sublicense Agreement and to continue with the Purchase Agent 2019 installation process.

7. Verify that the Purchase Agent Warehouse Exclusion, Purchase Agent and Purchase Agent Registration check box fields, found on the Select Features window, are checked.
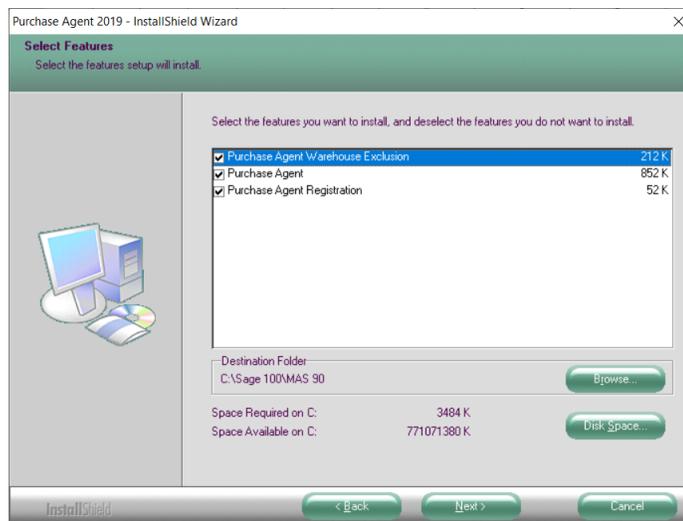
8. Accept the default location of Sage 100 or select the Browse button to specify the location of the Sage 100 installation. The Choose Folder window displays after the Browse button is selected.
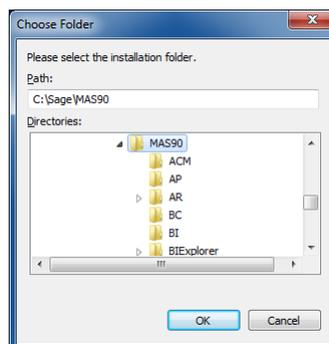
Specify the location of Sage 100 in the Path field. Select the OK button to return to the Select Features window.

Warning: Purchase Agent 2019 must be installed to the same location where Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium is installed. When an invalid directory location is entered in the Destination Folder field found on the Select Features window, the following message displays.
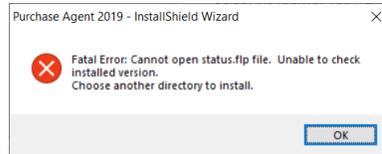
Select the OK button and then enter the correct location of Sage 100.

9. Select the Next button from the Select Features window. The installed version of Sage 100 is validated and then the confirmation installation window displays.

10. Select the Install button to install Purchase Agent 2019. Select the Back button to return to the Select Features window. Select the Cancel button, select *Yes* in the message *Are you sure you want to cancel the setup?* and then the Finish button from the InstallShield Wizard Complete window to cancel the Purchase Agent 2019 installation process.
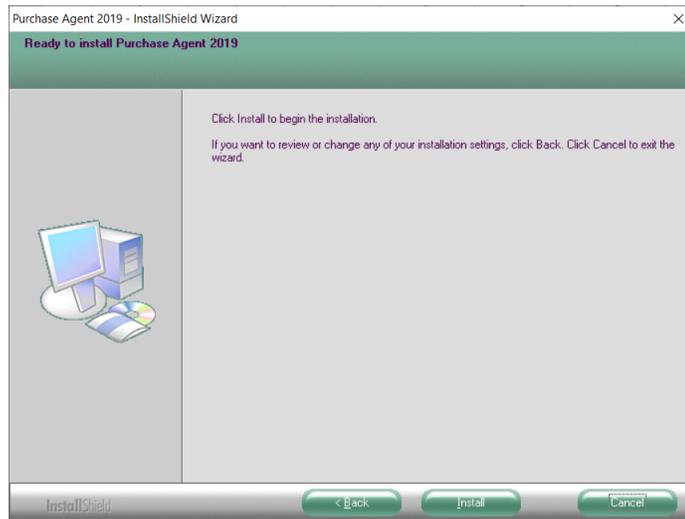
11. Select the Finish button from the Purchase Agent 2019 InstallShield Wizard Complete window.