



# Purchase Agent 2021

## Installation Guide

Sage Version 7.00

August 2021

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# Chapter 1

## Introduction to Purchase Agent

Purchase Agent helps you manage the purchasing process to avoid materials shortages and ensure the right materials arrive just in time.

By analyzing orders, minimum stock requirements, current supply, quantities on purchase order, and optional MRP projections, Purchase Agent creates a to-do list of the materials that need to be purchased.

The list is presented in an easy-to-read graphical table format ready for your buyer to review, edit, and act upon. Purchase Agent will even generate Purchase Orders with the click of a button.

## About this Guide

This guide provides the information necessary for installing, migrating, converting, and registering Sage 100 2021 with Purchase Agent 2021.

## Important Information

Read this guide completely before installing Purchase Agent. The Purchase Agent installation includes programs modified for the Purchase Agent. Before installing Purchase Agent, install and register Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium 2021.

## Registration Key Requests

Registration key requests are fulfilled in 1-3 business days. When conducting an upgrade or a new installation, please plan according and only conduct an installation once registration keys are received. Purchase Agent may be requested from <http://www.thepurchaseagent.com/node/8>.

## Parallel Test Environment


Performing a test upgrade or a test new install allows you to resolve issues that may occur during the live upgrade or live new install, reducing downtime and allows you to determine a rough estimate of how long the upgrade process will take. Refer to the [Sage Knowledgebase article ID 101266](#) for more information. Note that third party products must be re-installed after a migration, which also includes Purchase Agent.

## Non-Scanco Third Party Products

 **Warning:** Purchase Agent may not be compatible with non-Scanco third party products.


If third-party products that integrate with Sage 100 are used, check with the vendor of the third-party product to ensure that the third-party product is fully compatible with this release. If other Sage products are integrated, check with your business partner or Sage to ensure that these components are compatible.

## Sage Production Management

 **Warning:** The integration with Sage Production Management is currently unavailable. This integration will be available in the near future.

Purchase Agent may be installed when Sage Production Management is installed in Sage 100. Purchase Agent currently does not review Sage Production Management work tickets when generating data.

## Sage Operations Management


 **Warning:** The integration with Sage Production Management is currently unavailable. This integration will be available in the near future.

Purchase Agent may be installed when Sage Operations Management is installed in Sage 100. Purchase Agent currently does not review Sage Operations Management work tickets when generating data.

## Scanco Multi-Bin

Purchase Agent may be installed when Scanco Multi-Bin is installed in Sage 100. Purchase Agent currently does not review Sage Operations Management work tickets when generating data.

## Scanco Enhancements

 **Warning:** Purchase Agent is not compatible with Scanco Manufacturing Efficiency, Scanco In Transit, Scanco Scheduled Bill of Materials, Scanco Property Management 2000, or Scanco Advanced Landed Cost.

## Component Exception Manager vs. Inventory Requirements Planning

Purchase Agent may be installed when Sage Production Management or Sage Operations Management is installed in Sage 100. The Inventory Requirements Planning (IRP) module is only compatible when the Sage Production Management module is installed in Sage 100 or Sage Production Management and Sage Operations Management are not installed in Sage 100. Use the Component Exception Manager when Sage Operations Management is installed.

## Supporting Documentation

Refer to the Sage 100 Installation and System Administrator's Guide for information on installing Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium and Sage 100 2021.

 **Note:** Please contact your authorized Sage Operations Management partner or JobOps Support at (800) 815-8485 or [support@jobops.com](mailto:support@jobops.com) for assistance.

## Required Sage 100 Modules

The following Sage 100 modules are required to be installed, activated, and set up 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 to use the Purchase Agent module.

- Bill of Materials
- Work Order
- Material Requirements Planning

The following modules do not integrate with the Purchase Agent module. Purchase Agent may be installed when the following module are installed in Sage 100. However, the data produced by the following modules is not reviewed by the Purchase Agent module.

- Sage Production Management
- Sage Operations Management
- Scanco Multi-Bin

# Chapter 2

## Purchase Agent Pre-Installation Checklist

Complete the following pre-installation checklist prior to installing Purchase Agent to ensure a successful installation.

- ❑ Do not install Purchase Agent 2021 when custom modifications exist on Sage 100 or Sage Operations Management modules. Custom modifications must be retrofitted to the current Sage 100 or Sage Operations Management. Please contact your Sage Operations Management partner or Sage Operations Management Sales at sales@jobops.com for information on evaluating extended solutions or third party software.
- ❑ Do not install Purchase Agent 2021 when Extended Solutions or Third Party Products are installed on the Sage 100 system. Please contact your Sage Operations Management partner or Sage Operations Management Sales at sales@jobops.com for information on evaluating extended solutions or third party software.
- ❑ Confirm that the Sage 100 2021 version is 7.00.0.0, 7.00.1.0, or greater 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 2021 is compatible with Sage 100 2021 with and without Product Update 1 and greater.

- ❑ Obtain a registration key for Purchase Agent 2021. When upgrading from a prior version, do not install Purchase Agent 2021 without first acquiring a new registration key. Refer to the Registering Purchase Agent 2021 section in the installation guide for more information on how to obtain a Purchase Agent 2021 registration key.



**Note:** Please allow 1-3 business days for processing a Purchase Agent 2021 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 2021.

# Chapter 3

## Purchase Agent Installation Checklists

Complete one of the following installation checklists to successfully install Purchase Agent 2021.

### New Installation of Sage 100 and Purchase Agent

- ❑ Complete the Purchase Agent 2021 pre-installation checklist. Refer to Purchase Agent Pre-Installation Checklist on page 8.
- ❑ Install Sage 100 2021. Refer to the Sage 100 2021 Installation and System Administrator's Guide.
- ❑ Install the Product Update for Sage 100 2021.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2021 Installation and System Administrator's Guide.
- ❑ Install Purchase Agent 2021. Refer to Installing Purchase Agent 2021 on page 11.
- ❑ If hot fixes are available on the Purchase Agent Downloads page for Purchase Agent 2021, install Purchase Agent 2021 hot fixes.
- ❑ Activate the required and optional Sage 100 modules from Library Master Main menu > Company Information.
- ❑ Create and set up company data files for required and optional Sage 100 modules.
- ❑ Define role security for the Purchase Agent module from Library Master Main menu > Role Maintenance Tasks tab under Purchase Order.
- ❑ Register Purchase Agent 2021 from Purchase Order Main menu > Purchase Agent. Refer to Purchase Agent Registration on page 16.
- ❑ Select the Options button from Purchase Agent 2021 from Purchase Order Main menu > Purchase Agent to set up the Purchase Agent module. Refer to How to Register Purchase Agent on page 17.

### Migrating Sage 100 to 2021 with Purchase Agent

The following steps must be conducted when migrating to Sage 100 2021 and the Purchase Agent module is installed.

- ❑ Complete the Purchase Agent 2021 pre-installation checklist. Refer to Purchase Agent Pre-Installation Checklist on page 8.
- ❑ Conduct a parallel installation of Sage 100 2021 when upgrading from version 2019. Refer to the Sage 100 2021 Installation and System Administrator's Guide, Sage 100 2021 Customer Upgrade Guide, and Sage 100 2021 Upgrade Checklist.
  -  **Warning:** Install Purchase Agent 2021 into a parallel test Sage 100 environment. Performing a test upgrade or a test new install allows you to resolve issues that may occur during the live upgrade or live new install, reducing downtime and allows you to get a rough estimate of how long the upgrade process will take. Refer to the [Sage Knowledgebase article ID 101266](#) for more information. As not noted in the Sage Knowledgebase article before step 20, third party products must be re-installed after a migration.
- ❑ Install the Product Update for Sage 100 2021.
  -  **Note:** Purchase Agent 2021 is compatible with Sage 100 2021 and Sage 100 2021 Product Update 1 and greater

- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2021 Installation and System Administrator's Guide.
- ❑ Install Purchase Agent 2021. Refer to Installing Purchase Agent 2021 on page 11.
- ❑ Migrate and convert Sage 100 data to 2021. Refer to the Sage 100 2021 Installation and System Administrator's Guide, Sage 100 2021 Customer Upgrade Guide, and Sage 100 2021 Upgrade Checklist.
- ❑ Reinstall Purchase Agent 2021. Refer to on page .
- ❑ If hot fixes are available on the Purchase Agent Downloads page for Purchase Agent 2021, install Purchase Agent 2021 hot fixes.
- ❑ If not activated in the prior version, activate the required and optional Sage 100 modules from Library Master Main menu > Company Information.
- ❑ If not activated in the prior version, create and set up company data files for required and optional Sage 100 modules.
- ❑ Define role security for the Purchase Agent module from Library Master Main menu > Role Maintenance Tasks tab under Purchase Order.
- ❑ Select the Options button from Purchase Agent 2021 from Purchase Order Main menu > Purchase Agent to set up the Purchase Agent module. Refer to How to Register Purchase Agent on page 17.

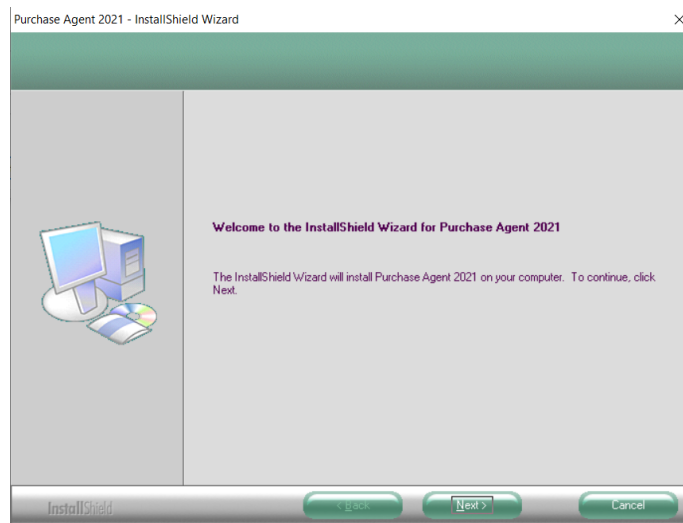
# Chapter 4

## Installing Purchase Agent 2021

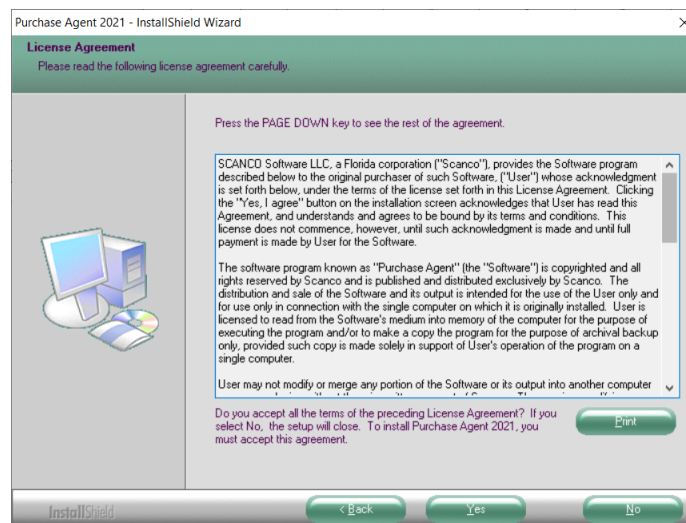
Conduct the following steps after Sage 100 2021 is installed successfully.

### How to Install Purchase Agent 2021

1. Download the Purchase Agent 2021 Release executable file from the Downloads page on the Purchase Agent website at [hwww.thepurchaseagent.com/](http://hwww.thepurchaseagent.com/) or <https://scanco.com/purchase-agent-for-sage-100-downloads/>
2. Right click on the Purchase Agent 2021 Release executable file.
3. Select Run as administrator.
4. Select the Next button from the Purchase Agent 2021 welcome window.

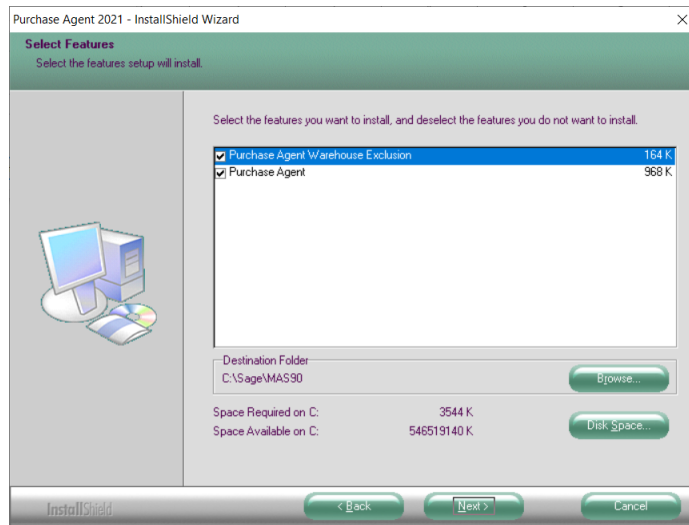


5. Review the Purchase Agent Customer Sublicense Agreement.

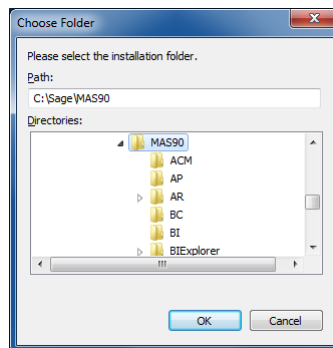


6. Select the Yes button to agree to the Purchase Agent Customer Sublicense Agreement and to continue with the Purchase Agent 2021 installation process.

7. Verify that the Purchase Agent Warehouse Exclusion and Purchase Agent check box fields, found on the Select Features window, are selected.

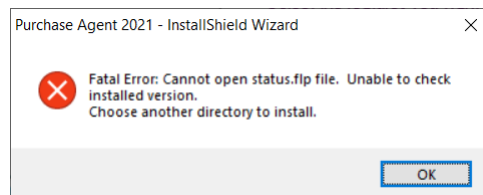


8. Accept the default location of Sage 100 or select the Browse button to specify the location of the Sage 100 installation. The Choose Folder window displays after the Browse button is selected.



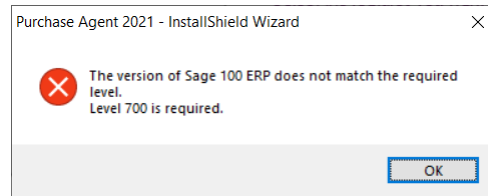
Specify the location of Sage 100 in the Path field. Select the OK button to return to the Select Features window.

**Warning:** Purchase Agent 2021 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.

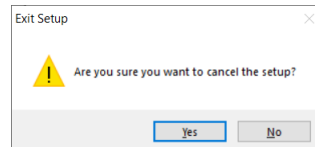


Select the OK button and then enter the correct location of Sage 100.

**Warning:** When Sage 100 is installed but is not version 2021, the following message displays.

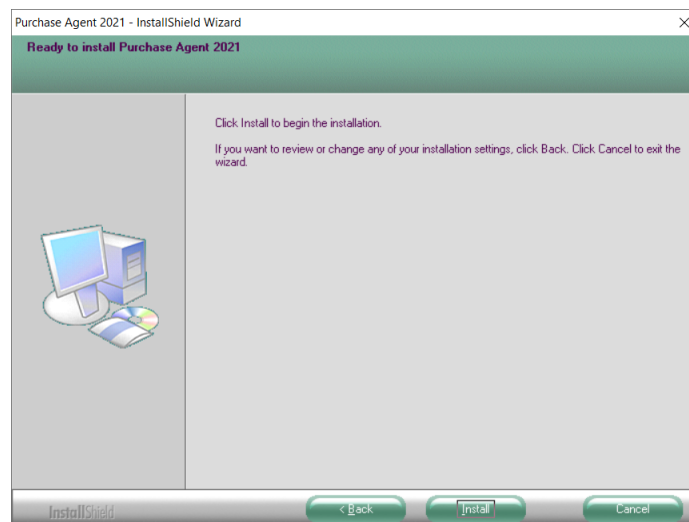


Select the OK button from the message. Select the Cancel button from the Select Features window. The following message displays.

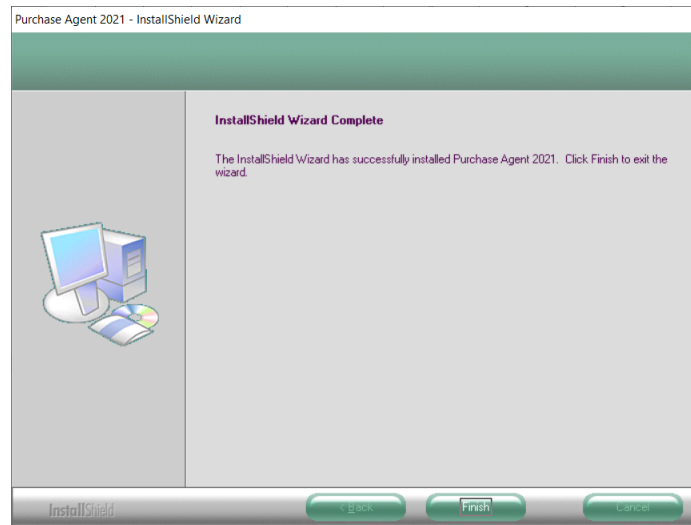


Select Yes in the message. Select the Finish button from the InstallShield Wizard Complete window to cancel the Purchase Agent 2021 installation process. Install Sage 100 2021 and then install Purchase Agent 2021.

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 2021. 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 2021 installation process.



11. Select the Finish button from the Purchase Agent 2021 InstallShield Wizard Complete window.



# Chapter 5

## **Purchase Agent Online Help**

Purchase Agent Online Help (JT.chm) is now installed by the Sage 100 Workstation Synchronization process.

# Chapter 6

## Purchase Agent Registration

A new registration key is required to access Purchase Agent 2021.

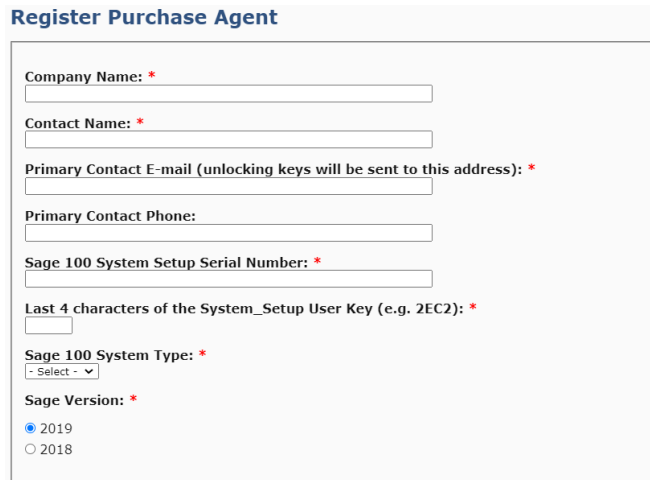
### How to Obtain a Purchase Agent Registration Key


1. Access [www.thepurchaseagent.com](http://www.thepurchaseagent.com).

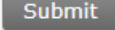



2. Select the Registration Keys tab.


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



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

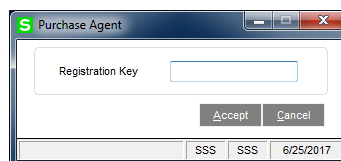
4. Select the  button. An email response to acknowledge the request is sent to the email address assigned to the Primary Contact E-mail field on the Purchase Agent registration form.

 **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 [support@jobops.com](mailto:support@jobops.com) or Scanco Support at [support@scanco.com](mailto:support@scanco.com) for assistance.

## How to Register Purchase Agent

1. After receiving a Purchase Agent registration key and installing Purchase Agent 2021, 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. When Sage 100 was migrated from a version prior to 2021, select the Options button from the Purchase Agent Selection window and then select the Registration button from the Purchase Agent Options window.



4. Enter a key in the Registration Key field.
5. Select the Accept button to register the Purchase Agent module and to access the Purchase Agent Selection window.