



# **Scanco Property Management 2021.2 with Service Work Order**

## **Installation Guide**

Scanco Property Management Version 7.0021

Sage 100 Versions 7.00.2.0

December 2021

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Scanco Software, LLC  
1000 N Tamiami Trail  
Suite 201  
Nokomis, FL 34275

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# Introduction to Scanco Property Management with Service Work Order

## About this Guide


This guide provides the information necessary for installing Scanco Property Management with Service Work Order 2021.2 version 7.0021.


## Important Information


Read this guide completely before installing Scanco Property Management with Service Work Order 2021.2 version 7.0021.

Before installing Scanco Property Management with Service Work Order 2021.2 version 7.0021, install and register Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium 2021 and Product Update 2.

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.

 **Warning:** Install Scanco Property Management with Service Work Order 2021.2 version 7.0021 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 noted in the Sage Knowledgebase article before step 20, third party products must be re-installed after a migration.

 **Warning:** Scanco Property Management with Service Work Order 2021.2 version 7.0021 may not be compatible with other Scanco or non-Scanco third party products. If you use third-party products that integrate with your Sage product, check with the vendor of your third-party product to ensure their product is fully compatible with this release. If you integrate with other Sage products, check with your business partner or Sage to ensure that these components are compatible.

 **Warning:** Scanco Property Management with Service Work Order is not compatible with Sage Production Management, Sage Operations Management, Scanco Multi-Bin, Scanco Manufacturing Efficiency, WOScan, In-Transit, Scheduled Bill of Materials, and Advanced Landed Cost When these enhancements are present in Sage 100, the upgrade cannot proceed.

 **Note:** Please contact Scanco Support at [support@scanco.com](mailto:support@scanco.com) for assistance with Scanco Property Management with Service Work Order.

## Sage 100 Required Modules

The following Sage 100 Modules are required to be installed and activated to use Scanco Property Management with Service Work Order.


- Library Master
- Common Information
- General Ledger
- Accounts Payable
- Accounts Receivable

# Scanco Property Management with Service Work Order

## Pre-Installation Checklist


Complete the following pre-installation checklist prior to installing Scanco Property Management with Service Work Order 2021.2 version 7.0021 to ensure a successful installation.

- ❑ Do **not** install Scanco Property Management with Service Work Order when custom modifications exist in Sage. Custom modifications must be retrofitted to the current Sage 100 version. Please contact your Sage partner or your Scanco Account Rep for information on how to obtain a quote for custom modifications to be retrofitted to Scanco Property Management with Service Work Order 2021.2 version 7.0021.
- ❑ Do **not** install Scanco Property Management with Service Work Order when extended solutions or third-party products are installed on the Sage 100 system. Please contact your Sage partner or your Scanco Account Rep for information on evaluating extended solutions or third-party software.
- ❑ Confirm that the Sage 100 installed version is 7.00.2.0 for the Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium system. Access the 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. Type \*info in the Program field. Select the OK button.
- ❑ Confirm that Sage Production Management, Sage Operations Management, Scanco Multi-Bin, Scanco Manufacturing Efficiency, WOScan, In-Transit, Scheduled Bill of Materials, and/or Advanced Landed Cost are not present. If it is necessary to uninstall any of these modules, contact Scanco Support at [support@scanco.com](mailto:support@scanco.com).
- ❑ Prior to installation or upgrade, ensure that the following transactions have been updated.
  - Accounts Receivable Invoice Data Entry
  - Accounts Receivable Cash Receipts Entry
  - Accounts Payable Invoice Data Entry
  - Accounts Payable Manual Check and Payment Entry
- ❑ Backup the entire Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium system, including programs and data files, after all data entry files are updated, and before installing Scanco Property Management with Service Work Order 2021.2 version 7.0021.
- ❑ Download the Scanco Property Management with Service Work Order 2021.2 version 7.0021 installation file and request registration information from <https://scanco.com/scanco-downloads>.

 **Warning:** A new registration file must be requested and activated





1. For a new installation of Scanco Property Management with Service Work Order,
2. When a module or add on was recently purchased or previously not activated,
3. When the Sage 100 user count changes,
4. When migrating from a lower version, for example 2019 version 6.10.2.0 to 2021 version 7.00.2.0 ,  
or
5. When the subscription plan has expired or modified.

A new registration file is not required for service releases or product updates when a registration file was previously activated. For example, a new registration file is not required when upgrading from 2021.1 version 7.00.1.0.0 to 2021.2 version 7.00.2.0 .0 and the purchased products, user count, and subscription plan have not changed.

 **Note:** Please allow 3-5 business days for processing Scanco Property Management with Service Work Order registration requests. If Custom modifications are found, the registration file may be delayed and a Scanco Account Rep contact the requester to evaluate the upgrade.

# Scanco Property Management with Service Work Order Installation Checklists

## New Installation of Scanco Property Management with Service Work Order

- ❑ Complete the Scanco Property Management with Service Work Order pre-installation checklist.
- ❑ Install Sage 100 2021 and Product Update 2. Refer to the Sage 100 2021 Installation and System Administrator's Guide.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2021 Installation and System Administrator's Guide.
- ❑ Install Scanco Property Management with Service Work Order 2021.2 version 7.0021. Refer to How to Install Scanco Property Management with Service Work Order on page 8.
  -  **Note:** Use the Scanco Property Management with Service Work Order installer when the Service Work Order add on was purchased.
- ❑ If hot fixes are available on the Scanco Downloads page for Scanco Property Management with Service Work Order 2021.2 version 7.0021, download and install the hot fixes. Refer to How to Install Scanco Property Management with Service Work Order Hot Fixes on page 12.
- ❑ Allow administrator access to new screen options by defining role security from Library Master Main menu > Role Maintenance.
- ❑ Activate Scanco Property Management with Service Work Order 2021.2 version 7.0021 from Library Master Setup menu > Scanco Product Registration. Refer to How to Activate Scanco Property Management with Service Work Order on page 12.
- ❑ Run the Sage data conversion process from Library Master Main menu > Company Maintenance. Refer to Sage Data Conversion Utility on page 13.
- ❑ Create Property Management with Service Work Order data files from Library Master Setup menu > Scanco Product Registration. Refer to Scanco Property Management with Service Work Order Prepare Data Utility on page 13.
  -  **Warning:** This step must be completed for all companies including companies where Scanco Property Management with Service Work Order is not being activated. The Prepare Data process ensure that data dictionaries are properly merged.
- ❑ Merge Scanco Property Management with Service Work Order screens with existing Sage Custom Office modifications from Custom Office Utilities menu > Update Custom Panels to Current Level. Refer to Update Custom Panels to Current Level on page 14.
  -  **Warning:** In some cases, customizations must be merged manually. Please contact your Sage partner or Scanco Support at [support@scanco.com](mailto:support@scanco.com) for assistance.
- ❑ When Multi Company enhancements were purchased and activated, navigate to Service Work Order Setup menu > Multi-Company Setup and select the Convert Data button for all companies using the Multi Company enhancements. Refer to Convert Multi Company Data on page 15.
- ❑ Install any non-Scanco, 3<sup>rd</sup> party applications.
  -  **Warning:** All non-Scanco 3rd part application and enhancements have been reviewed and approved for use with Scanco Property Management with Service Work Order.


## Upgrading Scanco Property Management with Service Work Order to Version 2021.2

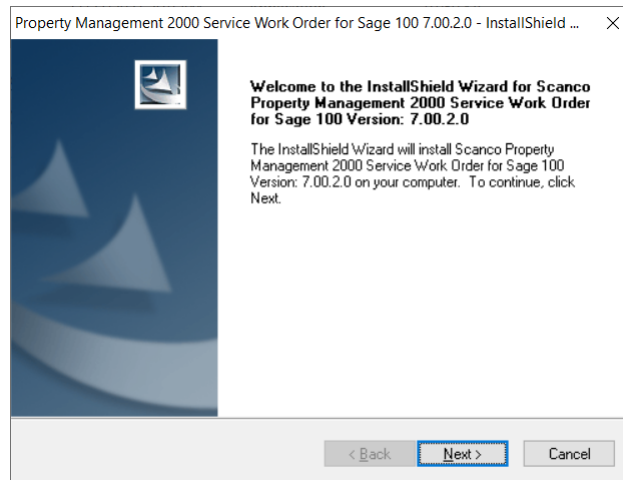
- ❑ Complete the Scanco Property Management with Service Work Order pre-installation checklist.
- ❑ Conduct a parallel installation of Sage 100 2021 when upgrading from a version lower than Sage 100 2021. Refer to the Sage 100 2021 Customer Upgrade Guide and the Sage 100 2021 Upgrade Checklist.
- ❑ Install Sage 100 2021 and Product Update 2. Refer to the Sage 100 2021 Customer Upgrade Guide and the Sage 100 2021 Upgrade Checklist.
- ❑ Run the Sage 100 workstation setup process on all applicable workstations. Refer to the Sage 100 2021 Installation and System Administrator's Guide.
- ❑ Install Scanco Property Management with Service Work Order 2021.2 version 7.0021. Refer to How to Install Scanco Property Management with Service Work Order on page 8.
- ❑ Migrate Sage 100 data to Sage 100 2021.2 through the Sage Data Migration Utility. Refer to the Sage 100 2021 Installation and System Administrator's Guide.
- ❑ Reinstall Scanco Property Management with Service Work Order 2021.2 version 7.0021.
- ❑ If hot fixes are available on the Scanco Downloads page for Scanco Property Management with Service Work Order 2021.2 version 7.0021, download and install the hot fixes. Refer to How to Install Scanco Property Management with Service Work Order Hot Fixes on page 12.
- ❑ Allow administrator access to new screen options by defining role security from Library Master Main menu > Role Maintenance.
- ❑ Activate Scanco Property Management with Service Work Order 2021.2 version 7.0021 from Library Master Setup menu > Scanco Product Registration. Refer to How to Activate Scanco Property Management with Service Work Order on page 12.
- ❑ Run the Sage data conversion process from Library Master Main menu > Company Maintenance. Refer to Sage Data Conversion Utility on page 13.
- ❑ Create Property Management with Service Work Order data files from Library Master Setup menu > Scanco Product Registration. Refer to Scanco Property Management with Service Work Order Prepare Data Utility on page 13.
  - ⚠ **Warning:** This step must be completed for all companies including companies where Scanco Property Management with Service Work Order is not being activated. The Prepare Data process ensure that data dictionaries are properly merged.
- ❑ Merge Scanco Property Management with Service Work Order screens with existing Sage Custom Office modifications from Custom Office Utilities menu > Update Custom Panels to Current Level. Refer to Update Custom Panels to Current Level on page 14.
  - ⚠ **Warning:** In some cases, customizations must be merged manually. Please contact your Sage partner or Scanco Support at [support@scanco.com](mailto:support@scanco.com) for assistance.
- ❑ When Multi Company enhancements were purchased and activated, navigate to Service Work Order Setup menu > Multi-Company Setup and select the Convert Data button for all companies using the Multi Company enhancements. Refer to Convert Multi Company Data on page 15.
- ❑ Install any non-Scanco, 3<sup>rd</sup> party applications.
  - ⚠ **Warning:** All non-Scanco 3<sup>rd</sup> part application and enhancements must be reviewed and approved for use with Scanco Property Management with Service Work Order prior to upgrading Sage 100 and Scanco Property Management with Service Work Order.

# Installing Scanco Property Management with Service Work Order

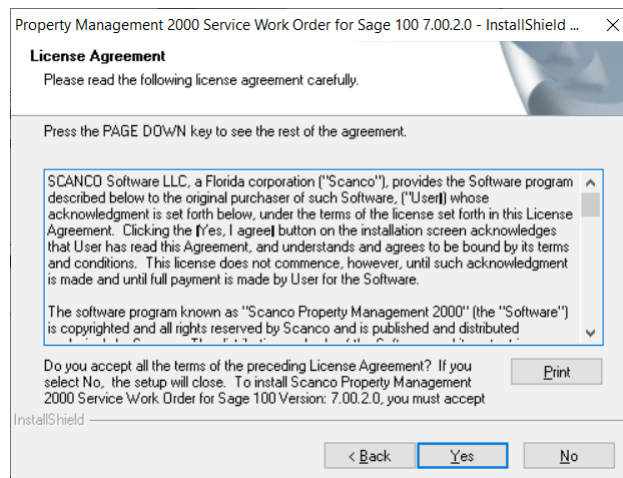
Conduct the following steps after Sage 100 2021 and Product Update 2 are installed successfully.

## How to Install Scanco Property Management with Service Work Order

1. Download the PM2000\_SWO\_70021.exe file from the Scanco Downloads page at <https://scanco.com/scanco-downloads>. When the Service Work Order enhancement was not purchased, download the PM2000\_70021.exe file.
2. Right click on the Scanco Property Management with Service Work Order 7.0021 executable file.  
 **Note:** The Scanco Property Management with Service Work Order executable file installs base Scanco Property Management and the Field Service Work Order enhancements.
3. Select Run as administrator.

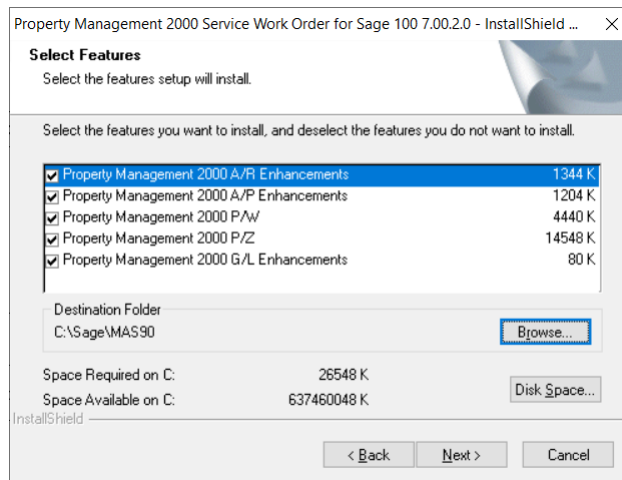


4. Select the Next button from the Scanco Property Management with Service Work Order Welcome window.
5. Review the Scanco Property Management with Service Work Order License Agreement.

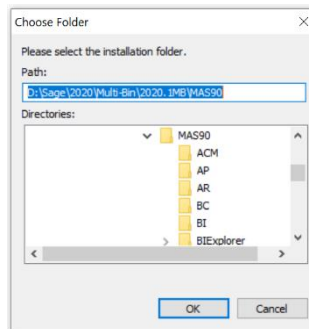


6. Select the Yes button to agree to the Scanco Property Management License Agreement and to continue with the installation process.
7. Accept the default check box field settings for Scanco Property Management with Service Work Order.





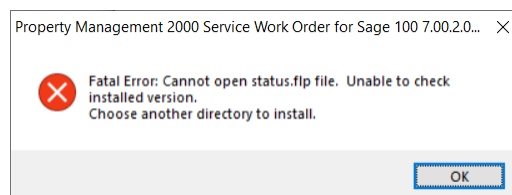
- Accept the default location of Sage 100 or select the Browse button to specify the location of Sage 100. The Choose Folder window displays after the Browse button is selected.



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

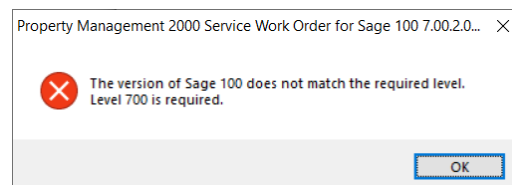
- Select the Next button from the Select Features window. The installed version of Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium is validated, including the Product Update.

**Warning:** Scanco Property Management with Service Work Order 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.

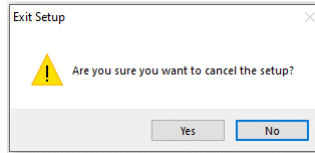


Select the OK button and modify the location where Sage 100 Standard, Sage 100 Advanced or Sage 100 Premium is installed.

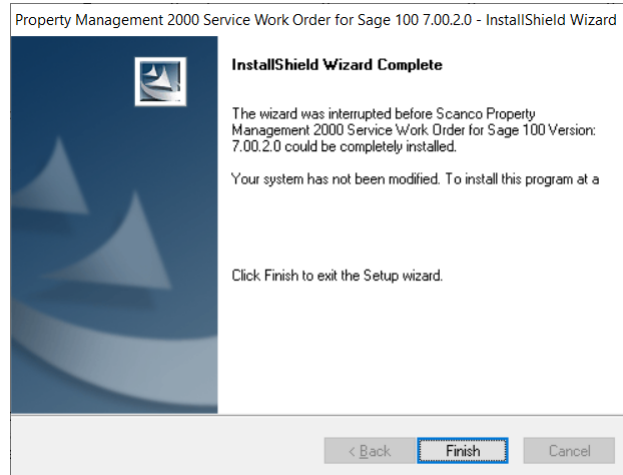
**Warning:** When Sage 100 is installed but is not version 7.00, the following message displays.



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

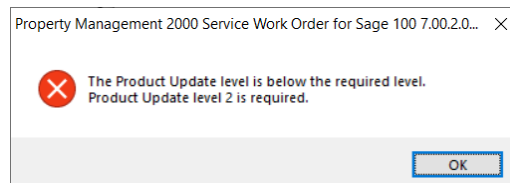


Select Yes in the Exit Setup message. Select the Finish button from the InstallShield Wizard Complete window to cancel the Scanco Property Management with Service Work Order installation process.



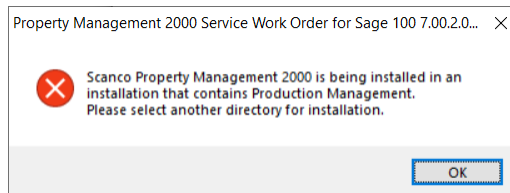
Install Sage 100 2021 Product Update 2 and then install Scanco Property Management with Service Work Order 2021.2 version 7.0021.

**Warning:** When Sage 100 version 6.20 is installed but Product Update 2 is not installed, the following message displays.



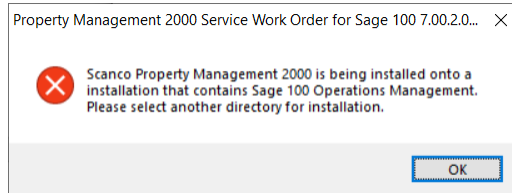
Select the OK button from the message. Cancel the Scanco Property Management with Service Work Order installation process. Install Product Update 2 and then install Scanco Property Management with Service Work Order by following the applicable checklist.

**Warning:** When Sage Production Management exists in Sage 100 the following message displays.



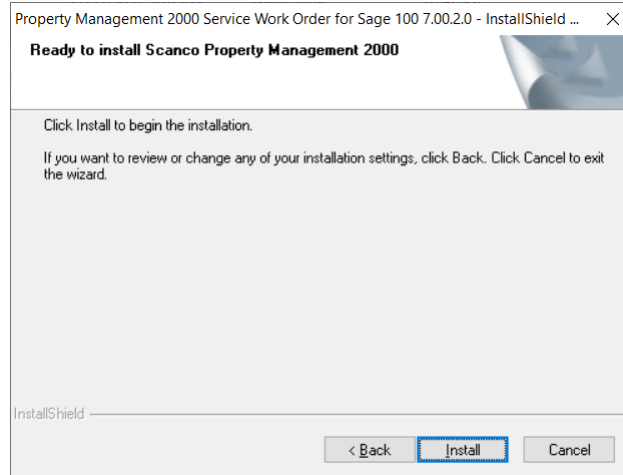
Scanco Property Management with Service Work Order may not be installed when Sage Production Management is installed in Sage 100. Select OK and cancel the Scanco Property Management with Service Work Order installation process.

**Warning:** When Sage Operations Management exists in Sage 100 the following message displays.



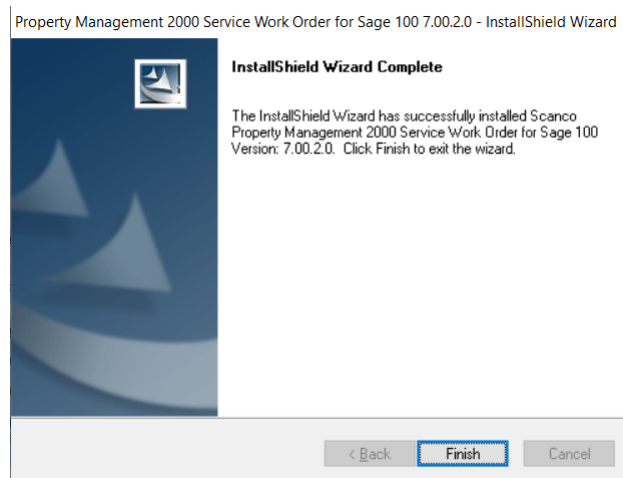
Scanco Property Management with Service Work Order may not be installed when Sage Operations Management is installed in Sage 100. Select OK and cancel the Scanco Property Management with Service Work Order installation process.

10. Select the Install button from the following window to install Scanco Property Management with Service Work Order.



Select the Back button to return to the Select Features window. Select the Cancel button, then select Yes in the message *Are you sure you want to cancel the setup?* and the Finish button from the InstallShield Wizard Complete window to cancel the Scanco Property Management with Service Work Order installation process.

11. Select the Finish button from the InstallShield Wizard Complete window to complete the Scanco Property Management with Service Work Order installation process.



## Scanco Property Management with Service Work Order Hot Fixes

Occasionally hot fixes are required to be installed after installing Scanco Property Management with Service Work Order. Access Scanco Property Management with Service Work Order hot fixes from the Scanco Downloads page <https://scanco.com/scanco-downloads>.

## How to Install Scanco Property Management with Service Work Order Hot Fixes

1. Navigate to the Scanco Downloads page at <https://scanco.com/scanco-downloads>.
2. Locate the section for Scanco Property Management with Service Work Order 2021.2 version 7.0021 Hot Fixes. Hot fixes may be available as singular IDs or in compilation zip files.  
**⚠ Warning:** Hot fixes are version and product update specific. Please verify that the Sage 100 and Scanco Property Management with Service Work Order versions matches the hot fix before downloading and installing.
3. Hot fixes will download in a .zip format. Extract the zipped directories into a working area.
4. Within the zip will be program directories that directly correspond to directories found within the Sage 100 .../MAS90 directory.
5. Prior to installing Scanco Property Management with Service Work Order 2021.2 version 7.0021 hot fixes, backup all .../MAS90 directory programs.
6. Copy the contents of each directory of the zip file to the corresponding .../MAS90 directory.

## Registering Scanco Property Management with Service Work Order

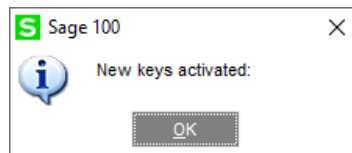
### How to Obtain Scanco Property Management with Service Work Order Registration

1. Navigate to the Scanco Downloads page at <https://scanco.com/scanco-downloads>.
2. Scroll down and click on Registration File Request.
3. Enter the required information in the Scanco Registration form. Fields noted with an asterisk (\*) are required.
4. Select the Submit button.

**📎 Note:** Please allow 3-5 business days for processing Scanco Property Management with Service Work Order registration requests. The Scanco Property Management with Service Work Order registration file is sent to the email specified in the Primary Contact Email field on the Scanco Property Management Registration form. If Custom Modifications are found, registration files may be delayed and a Scanco Account Rep will be in contact.

### How to Activate Scanco Property Management with Service Work Order

1. When requesting Scanco Property Management with Service Work Order registration, a text registration file with the format "SageSerialNumber-Version.txt" is provided.
2. Copy the text registration File to .../MAS90/\_Scanco.
3. Access Library Master Setup menu > Scanco Product Registration.
4. Select the Activate button.
5. Select OK in the following message.



# Data Preparation and Conversion

## Sage Data Conversion Utility

After installing Scanco Property Management with Service Work Order, the Sage Data Conversion Utility must be conducted.


- In Scanco Property Management with Service Work Order new installations, the Sage Data Conversion Utility ensures that all Sage required updates, conversion, or Product Update changes are fully integrated. Users are *required* to complete the Sage Data Conversion Utility prior to accessing any module activities.
- In Scanco Property Management with Service Work Order upgrades, the Sage Data Conversion Utility ensures that all Sage data conversion activities are successfully completed. Users are *required* to complete the Sage Data Conversion Utility prior to accessing any module activities.

### How To Run the Sage Data Conversion Utility

1. Users must log out of the Sage 100 system prior to running the Sage Data Conversion Utility.
2. Navigate to Library Master Main menu > Company Maintenance.
3. Select a Company Code.
4. Select the Convert button.
5. In the Convert Module Data Files Screen, review the warning and click Proceed.
6. Select OK when the conversion process is completed.

## Scanco Property Management with Service Work Order Prepare Data Utility


After the Scanco Property Management with Service Work Order installation process and the Sage Data Conversion Utility are completed, the Scanco Property Management with Service Work Order Prepare Data Utility must be conducted. The Scanco Property Management with Service Work Order Prepare Data Utility is a multi-function utility that completes data file preparation for new installations of Scanco Property Management with Service Work Order and a data conversion for existing installations of Scanco Property Management with Service Work Order with Service Work Order.


 **Warning:** All users except for the Sage 100 admin user conducting the Scanco Property Management with Service Work Order Prepare Data Utility must log out of Sage 100 for the Scanco Property Management with Service Work Order Prepare Data Utility to function properly.

### New Installations

Prior to enabling Scanco Property Management with Service Work Order for any company, the Scanco Property Management with Service Work Order Prepare Data Utility must be run to prepare existing data files with new Scanco Property Management with Service Work Order fields and newly create Scanco Property Management with Service Work Order files where needed.

The Scanco Property Management with Service Work Order Prepare Data Utility process merges Scanco Property Management files and fields into the Sage 100 data dictionary. This process ensures that all Sage 100 features that rely on the data dictionary, such as custom reporting, continue to function properly.

 **Warning:** Sage 100 data dictionary definitions are system-wise. Therefore, the Scanco Property Management with Service Work Order Prepare Data Utility must be processed for **ALL** companies in the Sage 100 system, including companies that are not utilizing Scanco Property Management with Service Work Order.

 **Note:** Running the Scanco Property Management with Service Work Order Prepare Data Utility for a company **WILL NOT** enable Property Management with Service Work Order in that company.

## Upgrading

When upgrading Sage 100 and Scanco Property Management with Service Work Order to a new version, the Scanco Property Management with Service Work Order Prepare Data Utility functions as a data conversion utility. The Scanco Property Management with Service Work Order Prepare Data Utility ensures that all new files and fields are properly set up and that data is converted from the prior version properly.

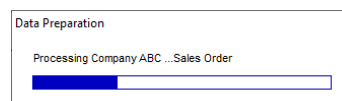
**Warning:** Upgrades from Sage 100 version 2018 or earlier are also converting to the Scanco Property Management with Service Work Order restructured file naming convention. The Scanco Property Management with Service Work Order Prepare Data Utility creates the new data files (with the new naming convention), and copies data from the old data file structure to the new. After conducting the Scanco Property Management with Service Work Order Prepare Data Utility after upgrading from 2018 or older, all data **must** be reviewed and confirmed by the Sage partner and/or end user.

## How To Run the Scanco Property Management with Service Work Order Prepare Data Utility

1. All users except for the Sage 100 admin user conducting the Scanco Property Management with Service Work Order Prepare Data Utility must log out of Sage 100 for the Scanco Property Management with Service Work Order Prepare Data Utility to function properly.
2. Navigate to Library Master Setup menu > Scanco Product Registration.
3. In the Upgrades section, select the Prepare Data Button.
4. Select One to run the Scanco Property Management Prepare Data with Service Work Order Utility for the current company. Select All to run the Scanco Property Management with Service Work Order Prepare Data Utility for all companies. Select No to cancel the Scanco Property Management with Service Work Order Prepare Data Utility process.



5. A processing dialog appears to track the progress of the Scanco Property Management with Service Work Order Prepare Data Utility through each module, in each company. Several other Scanco Property Management utilities run at the end of the Scanco Property Management with Service Work Order Prepare Data Utility.



**Warning:** The amount of time required to run the Scanco Property Management with Service Work Order Prepare Data Utility depends on the size of the Sage 100 database and server performance. The Scanco Property Management with Service Work Order Prepare Data Utility may process as quickly as a few minutes to several hours. Prepare for downtime accordingly, as users must be out of the Sage 100 system for the duration of the Scanco Property Management with Service Work Order Prepare Data Utility.

6. When completed, the focus is returned to the Scanco Property Management with Service Work Order window.
7. Select the Close button.


## Update Custom Panels to Current Level

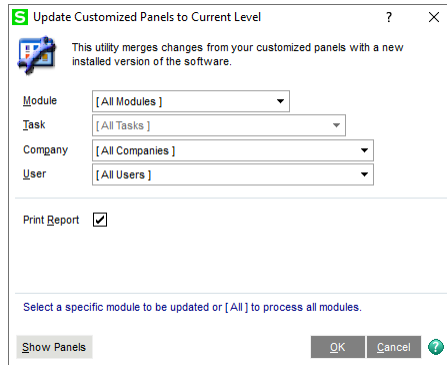
After Scanco Property Management with Service Work Order has been installed, panel customizations must be merged with Scanco Property Management with Service Work Order panel customizations. This process must be completed when upgrading from any version and panel customizations existed prior to the upgrade process. Use the Custom Office Update Custom Panels to Current Level Utility to merge customized panel.

**Warning:** In some cases, customizations must be merged manually. Please contact your Sage partner or Scanco Support at [support@scanco.com](mailto:support@scanco.com) for assistance.

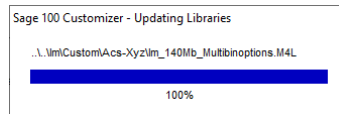
## How To Merge Customized Panels

1. Select Custom Office Utilities menu > Update Custom Panels to Current Level.
2. Select an option in the Module, Task, Company and User fields.

 **Note:** It is advised to run this utility for all options.



3. Select the OK button.
4. A process bar displays the libraries being updated.



5. Select to print or preview the Custom Office Customizer Detail Report if the Print Report checkbox was selected from the Update Customized Panels to Current Level task window.

## Convert Multi Company Data

When Multi Company enhancements were purchased and activated, the multi company convert data process must be conducted.

### How to Convert Multi Company Data

1. Navigate to Service Work Order Setup menu > Multi-Company Setup
2. Select the Convert Data button.
3. Conduct steps 1-2 for all companies that are using the Multi Company enhancements.