Sage 100c Integration Documentation

Sage 100 Contractor utilizes a license server to manage users. The license server can either be installed locally or on a host machine on the local network. The host machine installation allows users to access licenses from other computers. For more information about the Sage 100 Contractor setup visit <u>Sage Support</u>.

Setting up API Group inside Sage 100 Contractor

- 1. Open Sage 100 Contractor
- 2. Open the Company that will be utilizing the Sage 100c Integration

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Cancel

3. Login as Supervisor (If you do not have Supervisor permissions you will need whomever has those permissions to do these steps)

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4. Hover over Administration Tab \rightarrow Security \rightarrow Click Groups

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Installation and Setup of the Sage 100c Integration Plugin

1. Login to PlanSwift Plugin Store→ Search for Sage→ Select the Sage 100c Integration→ Click the Download button

- 2. Run installer
 - a. If multiple versions of PlanSwift are on the computer select the version that will be utilizing the integration
- 3. If installed properly, you will see a new tab in the bottom left hand corner of the PlanSwift Home Tab called "Sage 100 Contractor"
 - a. You can right click the tab and choose to dock it on the right if you prefer
- 4. Click on the New or Open icons at the top of the Sage 100 Contractor tab to pull up the Sage 100 Login window

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		2. Fill out the form with proper information that matches Sage 100 Cont

- 5. Fill out the the window with the appropriate Drive, Company, Username, and Password.
 - a. Please note that the user must be assigned to the API Group in Sage 100 Contractor for them to be able to log in
- 6. Once logged in, you will have access to create new jobs or open existing jobs from Sage 100 Contractor

Note: If you are using a beta version it must be uninstalled before installing the full version

Creating a New Job in PlanSwift using the Sage 100c Integration plugin

- 1. Click on the New Job icon located in the top left corner of the Sage 100 Contractor tab
- 2. Fill out the Job Properties window with the Job information
 - a. All of the following must be filled in:
 - i. Job#
 - ii. Job Name
 - iii. Short Name
 - iv. Job Status
 - b. Bid Items and Phases may be used. If none are added it will default to "0-None".
 - i. For more information about Bid items and Phases visit Sage Support

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- 3. After clicking the Create button, a window will pop up that states, "Could not find associated Job, Would you like to create a new PlanSwift Job?
 - a. Click the Yes button if you will be adding blueprints or if you are planning on digitizing in PlanSwift
 - b. Click No if you are just trying to create the project within Sage 100 Contractor
- 4. The New Job window will pop up with the Job/Quote # automatically populated with the Job # from Sage
 - a. It is recommended that you add a Description so as to easily find the project in the PlanSwift files later if you need to
 - b. Click the Next button

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5. The Properties information can be edited if you want to, but it is not necessary

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- 6. The Image Files window will allow you to browse to the location of the blueprints you want to load
 - a. Check the box next to the image files you want to load
 - b. Click the Next button

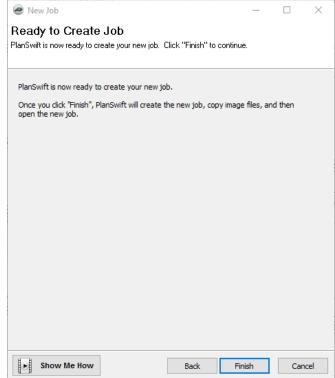
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7. The Convert Settings window allows you to adjust the quality and file type of the blueprints

- a. It is recommended that you convert the file to a TIF file to improve the speed of the speed of the software
- b. You can lower the DPI if you are loading a large set of plans to improve the speed of the software. Note: This will lower the quality of the image files
- c. Click the Next button

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Large TIF files ☑ Downsize large TIF files.			
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- 8. The Ready to Create Job window will pop up
 - a. Click the Finish button and your project will begin to load in PlanSwift



Uninstall Sage 100c Integration Plugin

The uninstall of the Sage 100c Integration can be done through the Programs and Features within Windows. Locate the the plugin with in the list (Sage 100c Integration) and click the uninstall button.

Setting Types

Every assembly within the Sage 100c Integration needs to have an associated type before you can use it to digitize. To set the type, locate the assembly with the Sage 100 Contractor window. The farthest right column of the assembly will display a "? None" if a type hasn't been set yet. Click the "? None" and select one of the available type options to assign to it. Once it has be set you can click the green dot on the far left of the assembly to start digitizing with that assembly.

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Digitizing In PlanSwift using the Sage 100 Contractor Assemblies

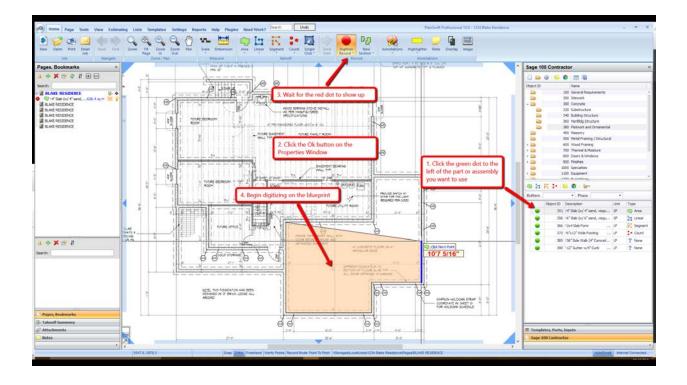
1. After a Job has been created, you will have access to the Sage 100 Contractor parts and assemblies within the Sage 100c Integration tab in PlanSwift

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- 2. A Type must be assigned to a Part or Assembly before you can use it to digitize in PlanSwift
 - a. To assign a type, click the box with "? None" and select the desired Type you will be using to digitize

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- 3. Make sure the appropriate scale has been set on your page
- 4. Click the green to the left of the part or assembly to begin digitizing
 - a. A properties window will show up that will allow you to change some of the properties. Remember that PlanSwift is pulling the formulas from Sage 100 Contractor so only adjust properties that won't affect the item information or formulas like color, fill, etc.
 - b. Click the Ok button to start digitizing
- 5. Wait for the red dot to show up at the top
- 6. Begin digitizing on the blueprint



Viewing Takeoff Information

- You can view your takeoff information in multiple ways.
 a. Pages tab in PlanSwift

 - b. Takeoffs window in Sage 100c Integration
 - c. Takeoffs window in Sage 100 Contractor

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