



DSD Business Systems

Sage 100 Enhancements

R007

Ship-To Addresses

AR-1007

Version 5.40



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Ship-To Addresses User's Manual
Version 5.40

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to SAGE 100. For instructions on using SAGE 100, refer to the appropriate SAGE 100 manual, or call your SAGE 100 reseller. DSD Business Systems offers excellent SAGE 100 support, at an hourly rate.

Web Resources

DSD web site: <http://www.dsdinc.com>

The Enhancement page contains:

- Current Release Schedule*
- Purchasing Information*
- Installation Instructions*
- Product Support*
- Enhancement Links*

R007 Ship-To Addresses:

<http://www.dsdinc.com/enhancement/ship-to-addresses-2/>

The product web page contains:

- Product Description*
- Web Links*
- Current Product Version Table*
- Product Installation File Download*
- Product Manual in .pdf Format*
- Revision History*
- FAQ*

Support

DSD provides product support through SAGE 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate. DSD's telephone number is **858-550-5900**. Fax: **858-550-4900**.

For a hard error, where the program displays an error dialog, report:

- Error number.*
- Program name.*
- Line number.*
- Program version.*

*Exact sequence that caused the error, including menus and menu selections.
Other pertinent information.*

If leaving a message or faxing, please include:

Your name.

Your phone number (and fax if applicable) and extension.

It is possible to be unable to duplicate a problem, because of data corruption or because we have not exactly duplicated a particular operating environment. In such circumstances, we can only continue to try to fix the problem if we can either access the system with Symantec PCAnywhere or by some other means access or duplicate the system.

Ship-To Addresses Features

This Extended Solution adds Ship-To Addresses to A/R Invoices and Repetitive Invoices. The Ship-To Addresses may be maintained from Customer Maintenance, as if the Sales Order module were installed. Each Ship-To Address is assigned a 'Ship-To Code.'

If the Sales Order module is installed, then the SO_ShipToCode_001\$ field needs to be used rather than the AR_ShipToCode_001\$ for Visual Integrator Imports.

Section B: Getting Started



- **If you reinstall or upgrade one of the SAGE 100 modules listed in the following table, you must also reinstall this Enhancement.**
- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.
- **Check with DSD before installing more than one Enhancement.**
- **Do not install this Enhancement on MAS SQL Systems.**

Required Levels

SAGE 100 Module	Module Required	Required Level
A/R	Y	5.40

Installation

1. **Back-up:** Exit all Sage 100 sessions. Back-up existing Sage 100 data.
2. **Check Levels:** Sage 100 module levels **must match** those listed above.
3. **Run Enhancement Setup Program:** Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.
4. **Send your Sage Serial Number to your DSD Representative:** Send your Sage Serial Number to your DSD representative in order for us to send you back the encrypted keys to unlock your system. This serial number can be found in Library Master\Setup\System Configuration, Tab 3. Registration as Serial Number.
5. **Re-Start Sage 100:** Sage 100 will be updated.
6. **Unlock the Enhancement:** DSD Enhancements must be unlocked to run. When any part of the Enhancement is run for the first time, the **DSD Enhancement License Agreement and Activation** window will appear. Follow the steps shown on that window. *You can click the Help button for more detailed instructions.*

Note: On the next page is a screenshot of the DSD Enhancement License Agreement and Activation window.

After accepting the License Agreement, you can then select the type of unlocking that you'd prefer. The choices are File, Web, Demo and Manual Entry.

File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from DSD *and then proceed to unlock all enhancements contained in the file*.

- The Sage 100 system that is being used must have web access for this option to be effective.
- You can send your Sage Serial Number to your DSD Enhancements sales representative.

Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

- Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.

Manual Entry Unlock: If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

Note: You can also unlock a DSD Enhancement through the **DSD Enhancement Control Panel** found on the Library Master Utilities Menu. Then, select the Enhancement with your mouse from the list of Enhancements and click the **Unlock Product** button on the right side of the window.

- Convert Data:** After unlocking, the DSD Conversion Wizard will appear. Follow on-screen instructions to complete data conversion. You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.

DSD Enhancement Control Panel

Starting with version 3.61, all DSD Enhancement products include DSD's Enhancement Control Panel. The **DSD Enhancement Control Panel** is accessed from the **Library Master Utilities** menu.

The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired task.

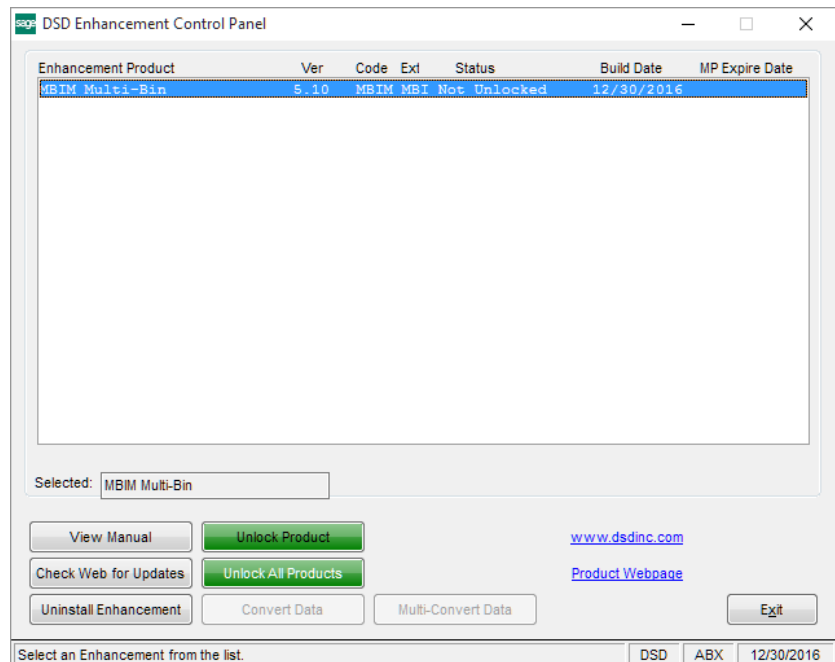
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

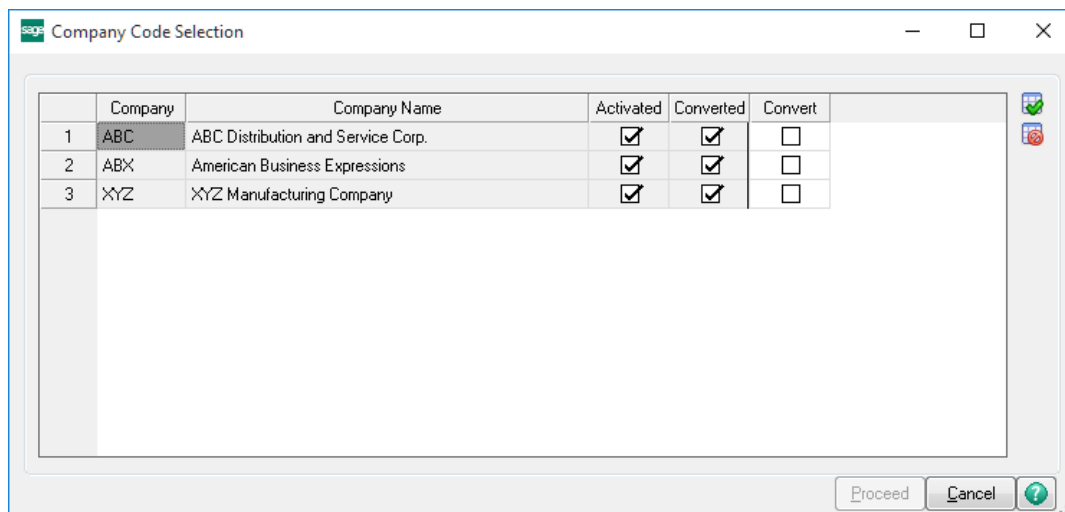
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

Unlock All Products: This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*

Convert Data: After verification, the selected Enhancement's data conversion program will run. Data conversion is non-destructive, and may be triggered any number of times. Sometimes this is required to fix data records imported or updated from a non-enhancement installation.



Multi-Convert Data: Multiple Companies can be converted at the same time for a given Enhancement. *(If you have a large number of Companies to convert, please do in batches of 20 or fewer due to memory limitations.)*



Help: The Help button, located at the bottom right of the window, opens an HTML help file.

Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system. (for more information see [Uninstall DSD Enhancements](#))

Section C: Setup

Upon completion of software installation, you will need to access DSD Extended Solutions Setup from the Accounts Receivable Setup menu. Select this part number and the Setup screen for this Extended Solution will appear. Check the 'Enable DSD Extended Solution' box to activate this Extended Solution.

AR-1007 Ship-to Addresses

☒ **Enable DSD Extended Solution** Level 5.40

☒ **Use Sales Tax Code From Ship to Address File**

☒ **Use Salesperson Code From Ship to Address File**

Accept **Cancel**

Check this box to enable AR-1007 Ship-to Addresses

DSD EEC 2/8/2017

Answer the following prompts:

Use Sales Tax Code From Ship to Address File: Check this box to use the Sales Tax Code from the Ship-To Address file. If you leave this box blank, then the value from the Customer Masterfile will be used.

Use Salesperson Code From Ship to Address File: Check this box to use the Salesperson Code from the Ship-To Address file. If you leave this box blank, then the value from the Customer Masterfile will be used.

You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

Section D: System Operations

Customer Maintenance

A 'Ship To...' option has been added to the drop list button of Customer Maintenance. When selected, it will take you to Ship-To Address Maintenance. You will be prompted for the Ship To Code and may then enter or maintain the Ship-To Addresses for this customer. A listing is available to print by clicking the printer button.

Customer Maintenance (ABC) 1/26/2011

Customer No. 01-ABF Name American Business Futures

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Os

Address 2131 N. 14th Street Suite 100 Accounting Department

ZIP Code 53205-1204 City Milwaukee State WI Country USA United States of America

Residential Addr ☐ Salesperson 0100 Jim Kentley Telephone (414) 555-4787 Ext 219 Fax

E-mail Address artie@abf.com URL Address www.abf.com

Terms Code 01 Net 30 Days Primary Contact ARTIE JOHN Artie Johnson Ship Code UPS BLUE Primary Ship To 2 American Business Futur

Tax Schedule WI MILMIL Milwaukee Exemptions...

Credit Hold ☐ Credit Limit 120,000.00

Paperless...

Accept Cancel Delete [Printer Icon]

Customer Ship-To Address Maintenance

Location Code 1 Name San Diego Location Primary ☐

Address 22 Acacia Ave. Suite 666 Residential Address ☐

ZIP Code 92130 City San Diego State CA Country USA United States of America

Telephone 619-990-3946 Ext Fax Batch Fax ☐

E-mail Address Contact JOHN QUINN John Quinn Warehouse Salesperson 0200 Shelly Westland

Sales Tax CA California Tax Schedule CA California Exemptions...

Accept Cancel Delete [Printer Icon] [Help Icon]

Invoice Data Entry

Click on the 'Ship To...' button in Invoice Data Entry to display the Ship-To Address screen. The Ship-To Address will default to the Customer's billing name and address. From here you may perform one of the following options:

- Leave the Ship To Address as is
- Overwrite with a new address which will not be saved
- Select a Ship To Code from an on file list
- Setup a new Ship To Address on the fly
- Click on the search button to select another Customer number's address

When using an on file Ship To Code and either the 'Use Sales Tax Code from Ship-To' and/or 'Use Salesperson From Ship-To' option have been selected in Setup, then the fields on the Invoice will be over written with the values from the Ship To Code.

The screenshot shows the 'A/R Invoice Data Entry (ABC) 1/26/2011' window with the 'Ship To...' button highlighted. The 'Ship To Address Entry' dialog box is open, displaying the following information:

Ship To Address Entry

Location Code: 1 Name: San Diego Location

Address: 22 Acacia Ave.
Suite 666

ZIP Code: 92130

City: San Diego State: CA

Country: USA

Residential Address: ☐

Salesperson: 0200 Shelly Westland

Sales Tax: CA California

Buttons: OK, Cancel

Repetitive Invoice Entry

Repetitive Invoice Entry works identically to Invoice Data Entry. The Ship-To Address and the code you enter here are saved with the repetitive invoice. When you perform a repetitive invoice selection, the new invoice is created with this Ship-To Address.

A/R Repetitive Invoice Entry (ABC) 1/26/2011

Customer No. 01-ABF
 Name American Business Futures
 Reference 0050

1 Header 2 Lines 3 Totals

Customer PO

Select Cycle 31
 Start Billing 1/31/2010
 Stop Billing
 Net Invoice 2,295.00

Terms Code 01 Net 30 Days
 Ship Method UPS BLUE
 Salesperson 0100 Jim Kentley
 Comment Monthly supply order

Sales Tax
 Schedule WI Wisconsin

Last Billed 5/31/2010
 Times Billed 5

Print Invoice ☒

ShipTo Accept Cancel Delete

Ship To Address Entry

Location Code 1 Name San Diego Location

Address 22 Acacia Ave.
 Suite 666

ZIP Code 92130
 City San Diego State CA
 Country USA
 Residential Address ☐

Salesperson 0200 Shelly Westland

Sales Tax
 Tax Schedule CA California

OK Cancel

A/R Invoice History

The Ship-To Address fields will be written to A/R Invoice History File as part of Sales Journal update. You can view the Ship-To Address associated with the document in A/R Invoice History Inquiry by clicking the Ship To button. Ship-To Addresses may be printed on A/R type invoices printed from the A/R Invoice History Printing option if you include the Ship-To fields in your form setup.

A/R Invoice History Inquiry (ABC) 1/26/2011

Invoice No. 0100057 Type INV Date 8/3/2010 Source A/R Order No.
 1. Main 2. Lines
 Bill to Address
 Customer 01-ABF
 Name American Business Futures
 Address 2131 N. 14th Street
 Suite 100
 Accounting Department
 ZIP Code 53205-1204
 City Milwaukee State WI
 Country USA
 Terms Code 01 Net 30 Days
 Ship Via UPS BLUE
 Customer PO
 Salesperson 01-0200 Shelly Westland
 Comment
 E-mail artie@abf.com
 Fax
 Source Journal AR-000005
 Schedule CA
 Apply To
 Taxable 55.25
 Nontaxable .00
 Freight .00
 Sales Tax 3.32
 Invoice Total 58.57
 Balance 58.57
 ShipTo

Ship To Address

Location Code 1 Name San Diego Location
 Address 22 Acacia Ave.
 Suite 666
 ZIP Code 92130
 City San Diego State CA
 Country USA
 Residential Address
 OK

Forms

The following fields have been added to these Crystal form printing work files:

<i>File:</i>	<i>Fields:</i>
AR_InvoiceWrk.M4T	SOShipToCode_001
	ARShipToCode_001
	ShipToName_001
	ShipToAddress1_001
	ShipToAddress2_001
	ShipToAddress3_001
	ShipToCity_001
	ShipToState_001
	ShipToZip_001
	ShipToCountryCode_001
AR_RepetitiveInvoiceListingWrk.M4T	Same as above
AR_InvoiceHistoryHeaderWrk.M4T	ARShipToCode_001

ODBC Dictionary

The files listed below have been added or changed in the ODBC Dictionaries by this Extended Solution.

<i>File:</i>	<i>Fields:</i>
AR_ShipToAddress_001.M4T	All Fields
AR_InvoiceHeader.M4T	SOShipToCode_001
	ARShipToCode_001
	ShipToName_001
	ShipToAddress1_001
	ShipToAddress2_001
	ShipToAddress3_001
	ShipToCity_001
	ShipToState_001
	ShipToZip_001
	ShipToCountryCode_001
AR_RepetitiveInvoiceHeader.M4T	Same as above
AR_InvoiceHistoryHeader.M4T	Same as above

Be aware that the ODBC Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

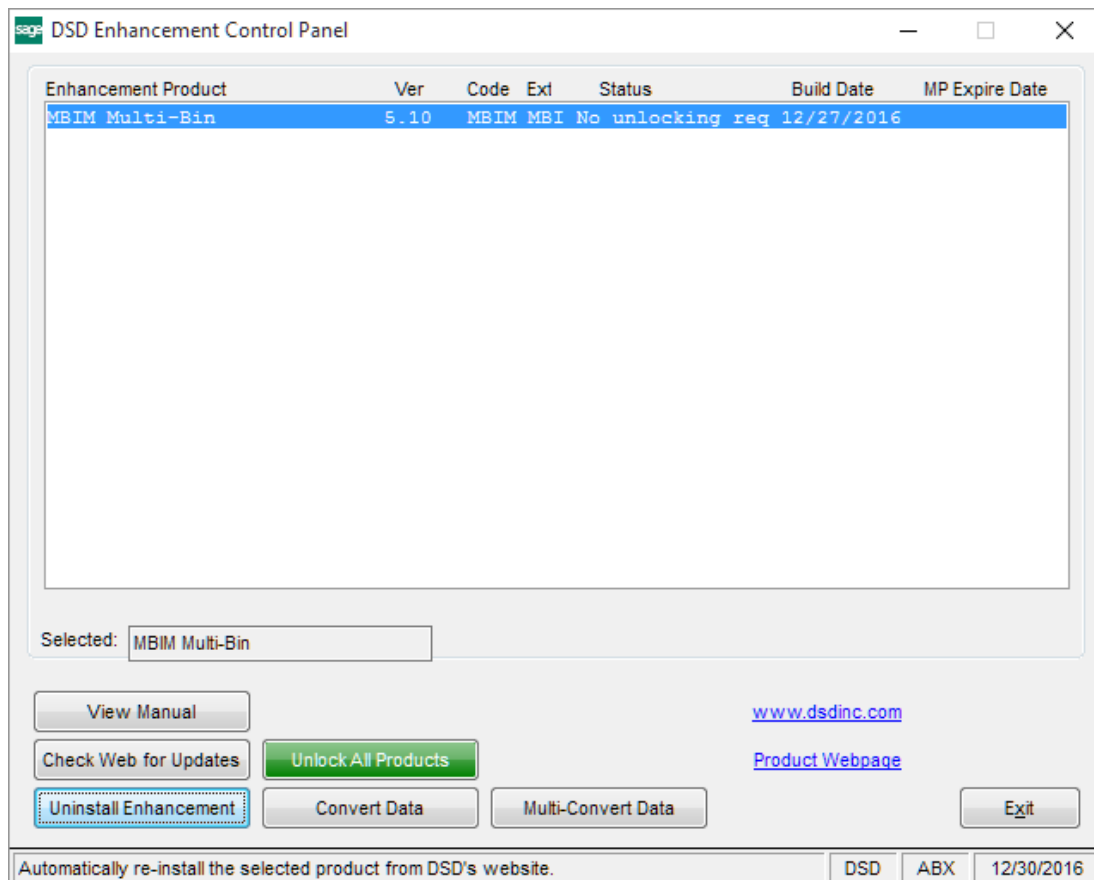
Reports

Listed below are the report names for any maintenance program which ships with this Extended Solution and its corresponding work file.

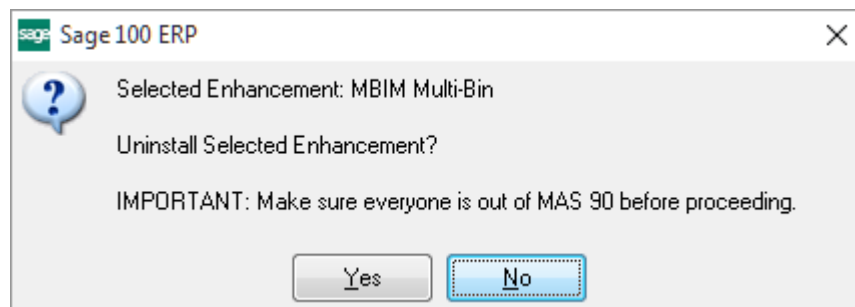
<i>Report Name</i>	<i>File</i>
AR_1007_001_ShipToAddressListing.rpt	AR_ShipToAddressListingWrk_001.M4T

Section E: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.

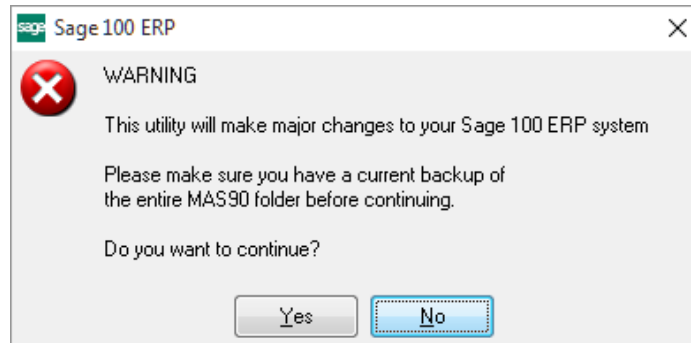


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.



Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process.

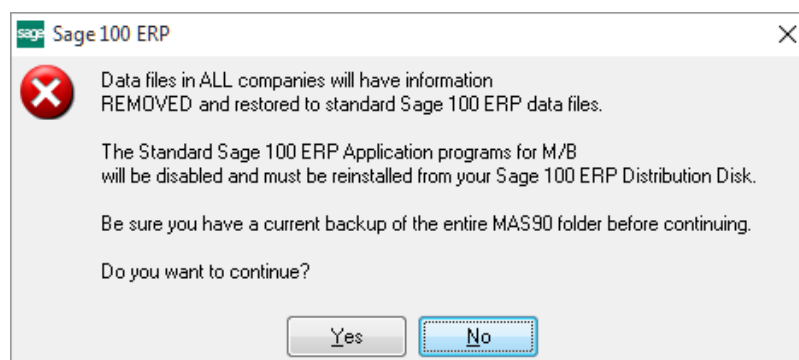
After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

A message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process.

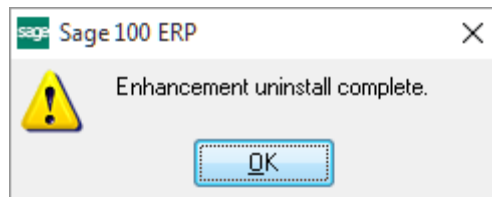
The following message box will appear, displaying the final warning message.



Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process. At this point, the DSD Enhancement will be removed from the Sage 100 system.

After completion of the Uninstall, the following message box will appear. Select OK to continue.



Now that the Uninstall process is completed, you must:

- Reinstall the applicable standard Sage 100 modules
- Reinstall the latest Sage 100 Service Pack/Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard Sage 100 module(s).