



DSD Business Systems

Sage 100 Enhancements

R007

Ship-To Addresses

AR-1007

Version 7.30



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Ship-To Addresses User's Manual
Version 7.30

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DSD Business Systems
8787 Complex Drive
Suite 400
San Diego, CA 92123
858/550-5900 8:00am to 5:00pm PST
858/550-4900 Fax

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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 DSD 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	7.30

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.

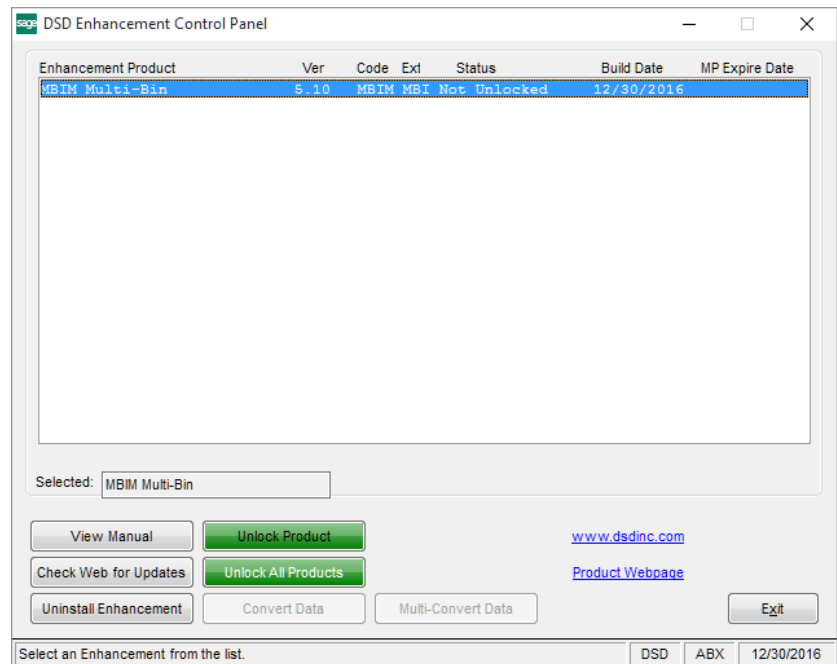
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct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

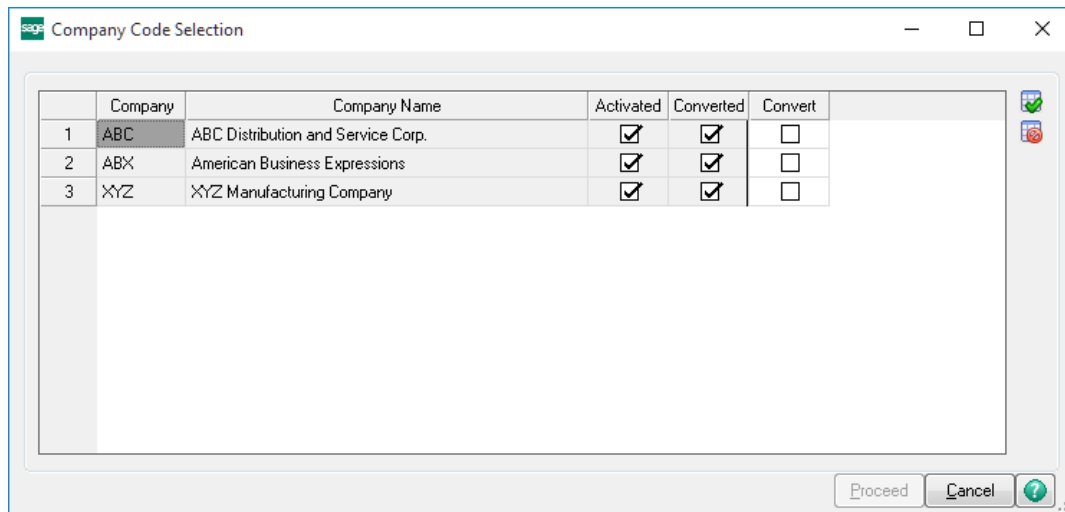
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

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.)*



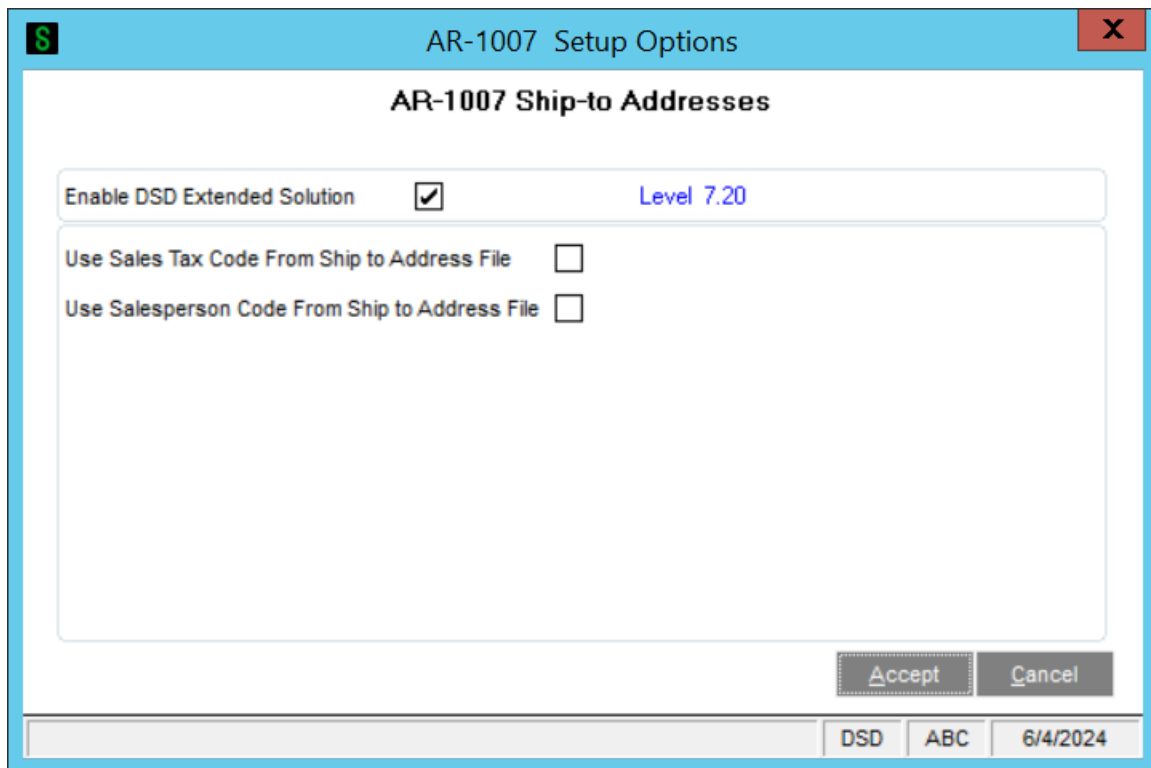
Help: The Help button, located at the bottom right of the window, opens an HTML help file.

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.



The image shows a software dialog box titled "AR-1007 Setup Options". Inside the dialog, the title "AR-1007 Ship-to Addresses" is centered. Below the title, there are three options with checkboxes: "Enable DSD Extended Solution" (checked), "Use Sales Tax Code From Ship to Address File" (unchecked), and "Use Salesperson Code From Ship to Address File" (unchecked). The text "Level 7.20" is displayed to the right of the first option. At the bottom right of the dialog are "Accept" and "Cancel" buttons. A status bar at the very bottom of the dialog shows "DSD", "ABC", and "6/4/2024".

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) 6/14/2024

Customer No. 01-ABF
Name American Business Futures

Copy From... Renumber... Ship To...

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

Country USA United States Residential ☐
Address 2131 N. 14th Street
Suite 100
Accounting Department
ZIP/Postal Code 53205-1204
City Milwaukee State/Province WI
Telephone (414) 555-4787 Ext 219 Work
Fax
E-mail Address artie@sage.sample.com
URL Address www.abf.com

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

Credit Hold ☐
Credit Limit 120,000.00

Salesperson 0100 Jim Kentley Split Comm...
Tax Schedule WI MILMIL Milwaukee Exemptions...

Customer Ship-To Address Maintenance

Location Code 1 Primary ☐
Name American Business Futures

Country USA United States Residential ☐
Address Distribution Warehouse
3121 W. 24th Street
ZIP/Postal Code 53146
City Milwaukee State/Province WI
Telephone (414) 555-4311 Ext Batch Fax ☐
Fax
E-mail Address

Contact JOHN QUINN John Quinn
Warehouse
Salesperson 0100 Jim Kentley
Ship Via UPS BLUE

Sales Tax
Tax Schedule WI MILMIL Milwaukee Exemptions...

Accept Cancel Delete

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 displays the 'Ship To Address Entry' dialog box. The 'Location Code' is set to '1'. The 'Name' field contains 'American Business Futures'. The 'Address' section includes 'Distribution Warehouse', '3121 W. 24th Street', and '53146' for the ZIP Code. The 'City' is 'Milwaukee' and the 'State' is 'WI'. The 'Country' is 'USA'. The 'Salesperson' is '0100' (Jim Kentley). The 'Sales Tax' section shows 'CA' (California). The background window shows the 'A/R Invoice Data Entry (ABC) 6/14/2024' screen with fields for 'Invoice Number' (0100061-IN), 'Batch' (00005), 'Customer No.' (01-A), and various dates. The 'Ship To' button is highlighted in the bottom toolbar.

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) 6/14/2024

Customer No. 01-ABF
 Name American Business Futures
 Reference 1. Header
 Customer PO
 Select Cycle
 Start Billing
 Stop Billing
 Net Invoice
 Sales Tax
 Schedule Wisconsin

Ship To Address Entry

Location Code Name American Business Futures

Address 2131 N. 14th Street
 Suite 100
 Accounting Department

ZIP Code 53205-1204
 City Milwaukee State WI
 Country USA
 Residential Address
 Salesperson 0100 Jim Kentley

Sales Tax
 Tax Schedule WI Wisconsin

OK Cancel

ShipTo Accept Cancel Delete

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) 6/14/2024

Invoice No. 0100061 Type INV Date 6/14/2024

Source A/R Order No.

1. Main 2. Lines 3. Payments

Customer 01-ABF

Name American Business Futures

Source Journal Ship To Address ? x

Location Code 1 Name American Business Futures

Address Distribution Warehouse

3121 W. 24th Street

ZIP Code 53146

City Milwaukee State WI

Country USA

Residential Address ☐

OK

E-mail artie@... Batch Fax ☐

OK

Forms

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

File:

AR_InvoiceWrk.M4T

AR_RepetitiveInvoiceListingWrk.M4T

AR_InvoiceHistoryHeaderWrk.M4T

Fields:

SOShipToCode_001

ARShipToCode_001

ShipToName_001

ShipToAddress1_001

ShipToAddress2_001

ShipToAddress3_001

ShipToCity_001

ShipToState_001

ShipToResidentialAddress_001

ShipToZip_001

ShipToCountryCode_001

Same as above

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
	ShipToResidentialAddress_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.

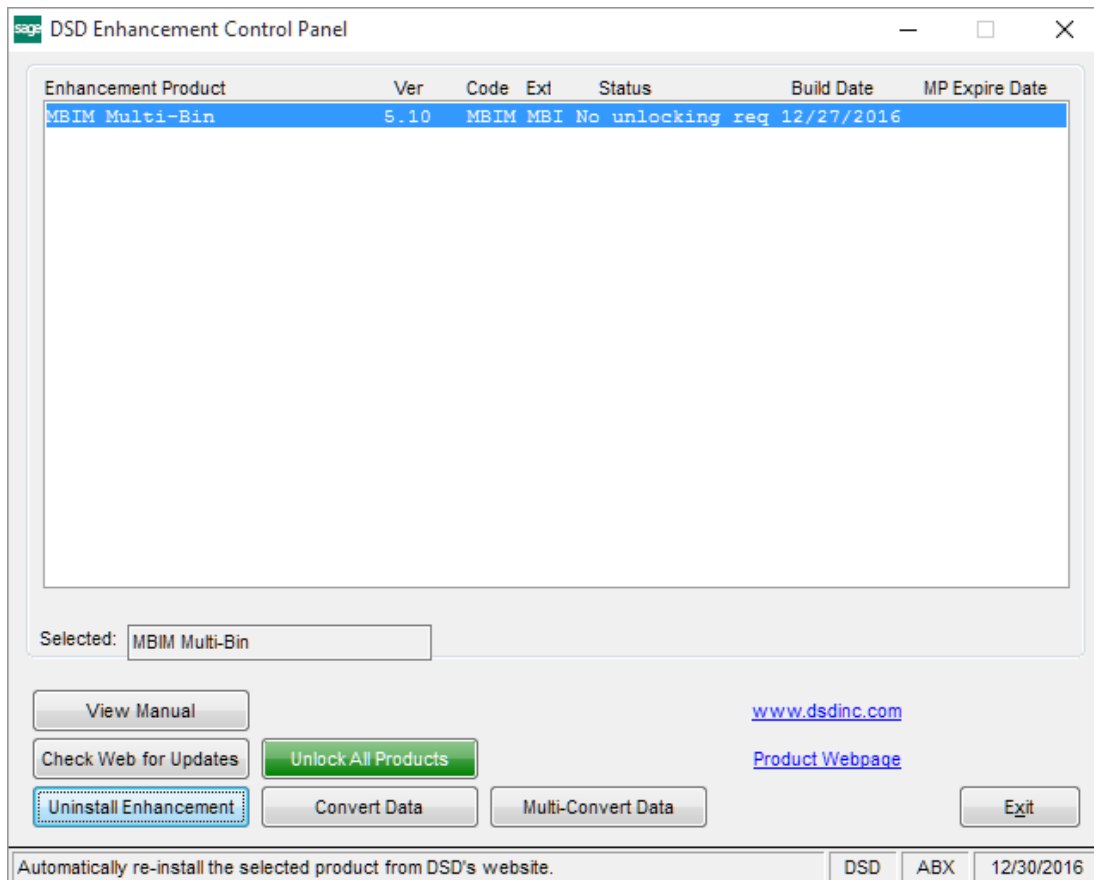
Reports

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

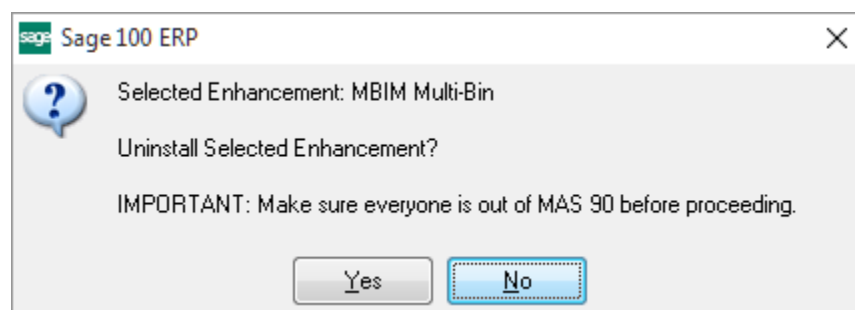
<i>Report Name</i>	<i>File</i>
AR_1007_001_ShipToAddressListing.rpt	AR_ShipToAddressListingWrk_001.M4T

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.

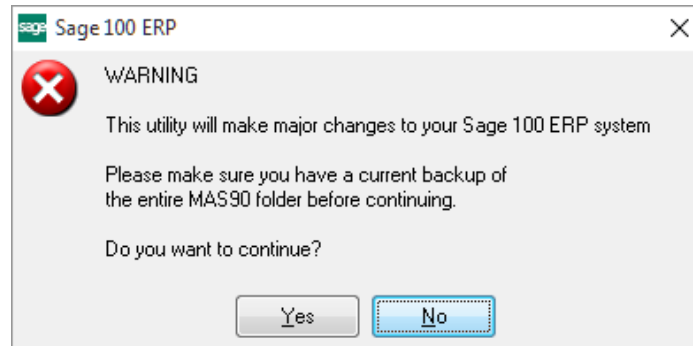


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



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.



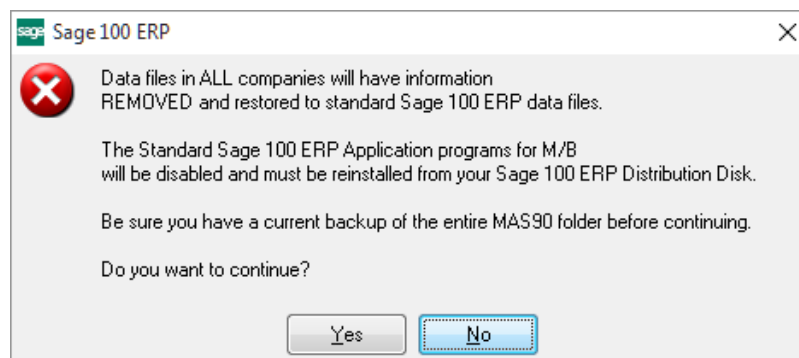
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.

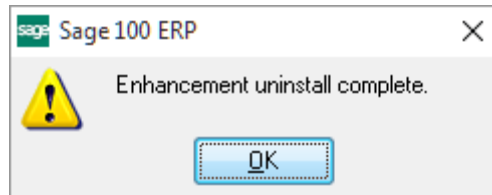
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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).