DSD Business Systems

Sage 100 Enhancements

R239

Multi-Company Customer Synchronization

AR-1239

Version 7.20

Information in this document is subject to change without notice.

Multi-Company Customer Synchronization User's Manual
Version 7.20

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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*

R239 Multi-Company Customer Synchronization :

http://www.dsdinc.com/enh/pages/R239.htm

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 remotely or by some other to duplicate the system.

Multi-Company Customer Synchronization Features

This DSD Extended Solution to the Accounts Receivable module synchronizes Customer Maintenance information across multiple companies.

Section B: Getting Started

CAUTION

- **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.**

Required Levels

Sage 100 Module	Module Required	Required Level
A/R	**Y**	7.20

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.*

7. **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.*)
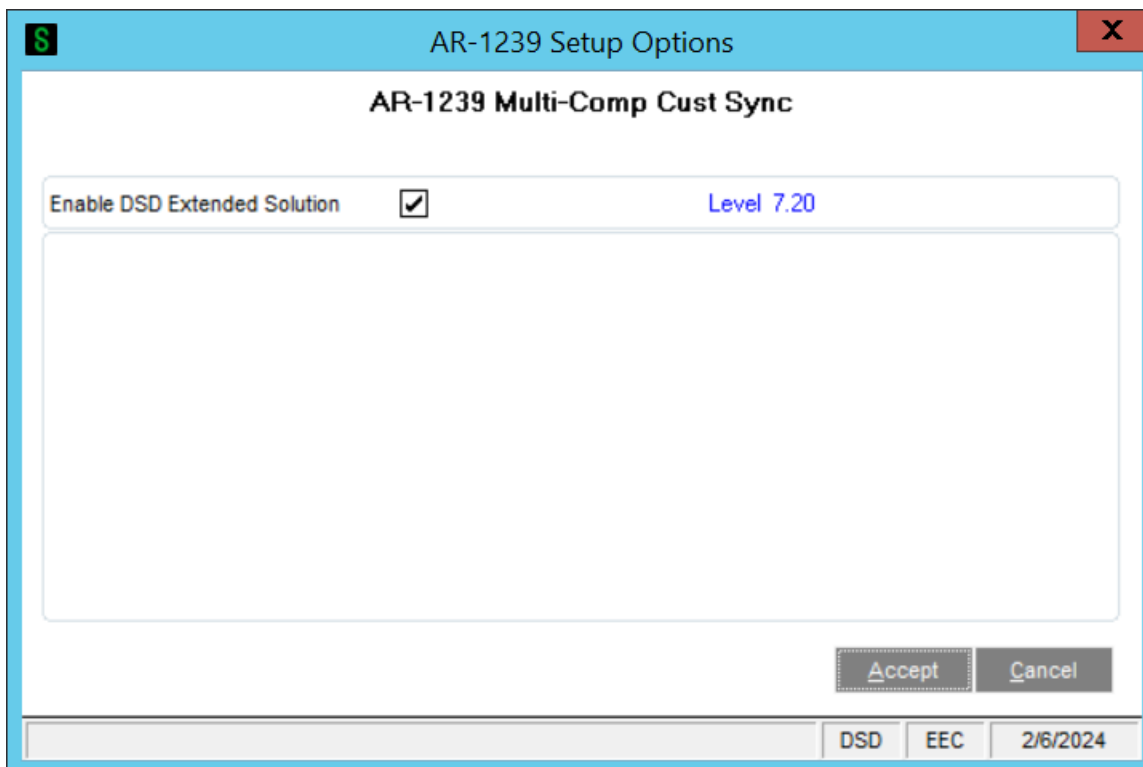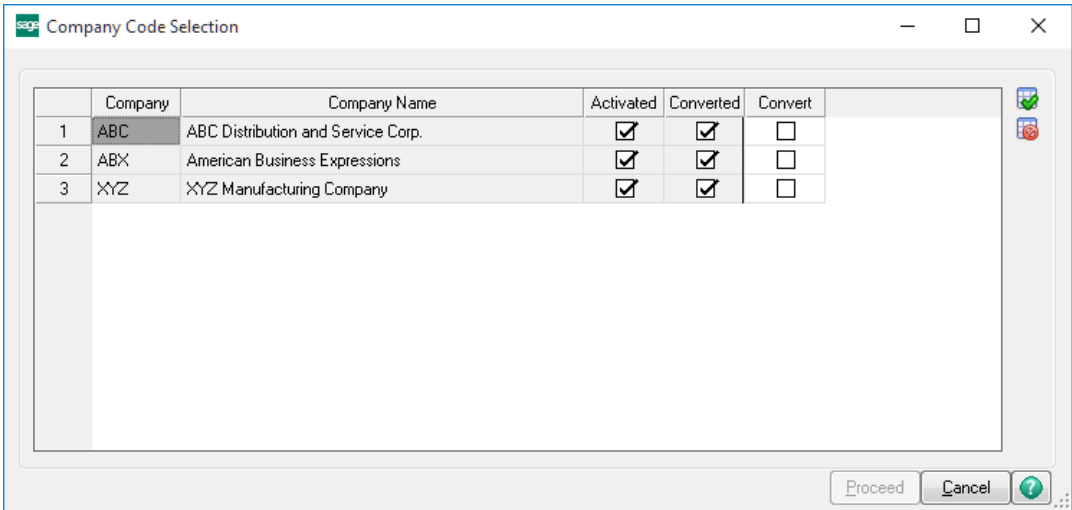

Help: The Help button, located at the bottom right of the window, opens an HTML help file.

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 the 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.

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

Users who perform Customer synchronization need to have the following Accounts Receivable Maintenance/ Data Entry Tasks defined to their Role in each company code:

- Customer Maintenance
- Salesperson Maintenance
- Terms Code Maintenance

Section D: System Operations

Library Master - Company Synchronization Maintenance

When the user selects this menu option, all company codes will be displayed in the grid, and the user will be able to toggle the "Customer" selection for those companies to be included in the auto-copy.

Below the grid, there will be a field called "**Prompt During Data Entry**". Check this box to allow users to override the selections in A/R Customer Maintenance.

To the right of the "Prompt During Data Entry" will be a field called "**Copy for Account Changes**". Check this box to allow the Customer changes (such as Customer Name, Address, etc.) to existing Customer records to be copied to the other companies.

An entry in the "**Password**" field will require the user to enter a password to override the company settings in A/R Customer Maintenance.

To the right of the "Password" will be a field called "**Retain Last Company Selection**". Check this box to retain the last "Included" selections by company instead of using one selection globally.

Check the **"Only display companies that need to be updated"** checkbox to only display companies that need updating. If the Customer Number entered is a **new** customer, then only those companies that do NOT have the customer already setup will be displayed. If the Customer Number is **changed**, then only those companies where the Customer Number exists, and the customer data is different, will be changed.

Select the **Accept** button to save the company entries, **Cancel** to void changes, and the **Printer b**utton to print a listing of the companies and associated "Include" setting.

Customer Maintenance and Customer Maintenance On-The-Fly

When a new Customer is created or when a change has been made to any the following fields in the Customer record:

> Customer Number
> Customer Name
> Address line 1
> Address line 2
> Address line 3
> Zip
> City
> State
> Country
> Terms Code
> Sales Tax Schedule
> Email Address
> Fax No
> Telephone No

Or the following fields in a Ship-To Address record

> Ship To Code
> Ship To Name
> Ship To Address line 1
> Ship To Address line 2
> Ship To Address line 3
> Ship To Zip
> Ship To City
> Ship To State
> Ship To Country
> Ship To Contact Code
> Ship To Sales Tax Schedule

Or the following fields in a Contact Code record

> Contact Code
> Contact Name
> Contact E-mail

Or any standard MAS90 field in Paperless Delivery Options

as you click the 'Accept' or 'Cancel' button* in Customer Maintenance, you will be prompted to synchronize the customer information across all Company Code which have an Accounts Receivable module set up and which contain this customer's division. Select the company codes you wish to have updated via the Select checkbox to the right of the company code. This box will default to 'checked' if the Customer Number exists in that Company.

* Note regarding standard Sage 100 processing: Clicking the 'Cancel' button on the customer maintenance screen will not cancel changes already made in Ship-To Address Maintenance, Contact Code Maintenance, and Paperless Delivery Options Maintenance. Also, if you change a customer data field before going into another dialog, your change is automatically saved and cannot be cancelled.

Once you click 'Proceed' the same Customer (if new) will be created in all the selected company codes. If the Customer already exists, the Customer's information will be updated.

A form must be set up and enabled for Electronic Delivery for a destination company in Paperless Office Form Maintenance for the synchronization of Paperless Delivery Options to occur in that company.

Ship-To Address Maintenance

When you access Ship-To Address Maintenance outside of Customer Maintenance and Customer Maintenance on-the-fly, you will be prompted to synchronize the data as the record is accepted. If you make a change, then access the Tax Exemption dialog within Ship-To Maintenance, your change to Ship-To Maintenance is automatically saved and cannot be cancelled. In this case, the company selection window will appear when you click the 'Cancel' button.

Contact Code Maintenance

When you access Contact Code Maintenance outside of Customer Maintenance and Customer Maintenance on-the-fly, you will be prompted to synchronize the data when the record is accepted.

Creating New Customer in Destination Company

When creating a new Customer record, the Salesperson Number will be copied from the source company because it is a required field. If that Salesperson Number doesn't exist in the destination company, a new Salesperson will be created. The copied salesperson data fields will be: Name, Address, Phone Number, E-Mail Address, and Commission Rate.

The same is true for Terms Code; it will be copied from the source company because it is a required field. If that terms code doesn't exist in the destination company, a new one will be created. Standard Sage 100 Terms Code data fields (not User Defined Fields) will be copied.

Creating New Contact Code in Destination Company

Only the three fields listed above will be copied from the source company. Other fields will follow standard Sage 100 defaulting logic.

*Creating New Ship-To Address in Destination Company*

Only the eleven fields listed above will be copied from the source company. Other fields will follow standard Sage 100 defaulting logic.

The Accounts Receivable Customer Delete/ Renumber/ Merge Utilities and Customer Renumber through Customer Maintenance are not supported.

User Defined Fields (UDFs) are supported when copying Customer Masterfile, Customer Contact, and Ship To Address data.

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.
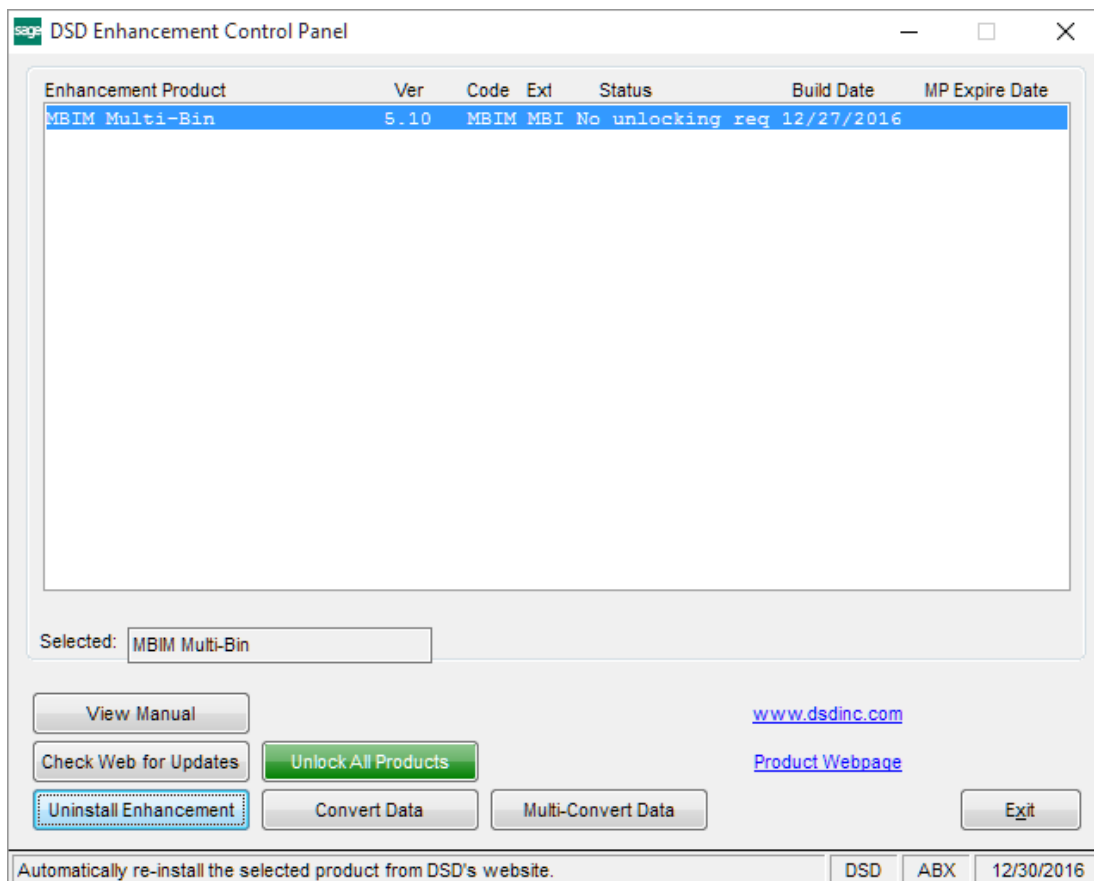

When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:
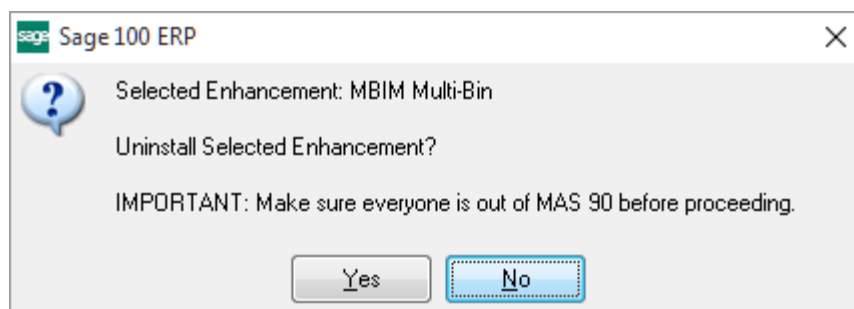
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.
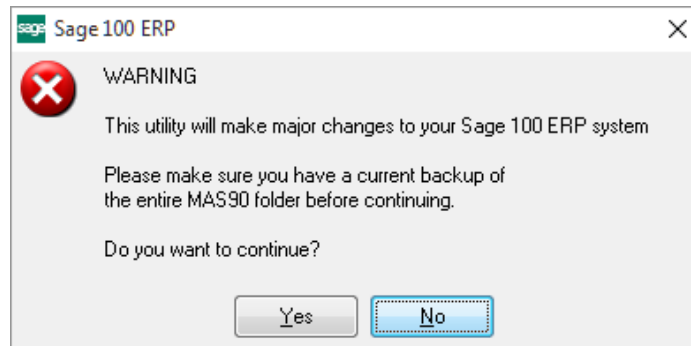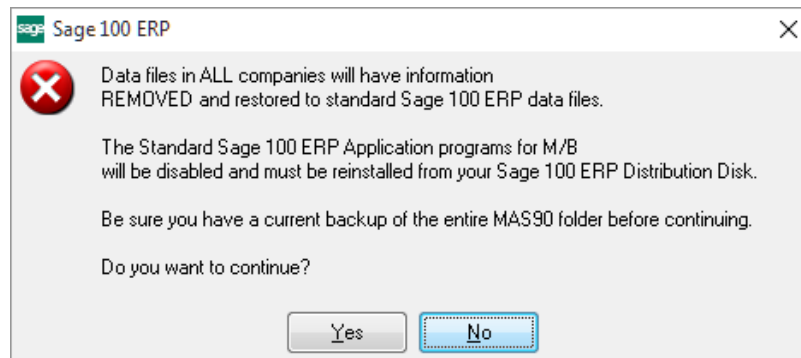

Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

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.
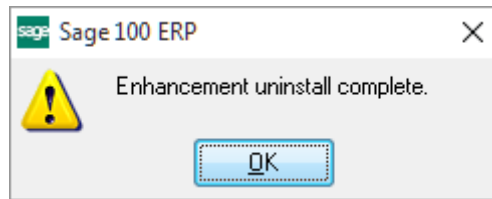
Now that the Uninstall process is completed, you must:

- 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).