



# Duplicate Customer Tracking

## For Sage 100 ERP 2014

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The Sage logo consists of the word 'sage' in a lowercase, green, sans-serif font.

Development Partner

**GOLD**

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## Table of Contents

<i>Installation Instructions and Cautions</i> .....	3
<b>Wait! Before You Install – Do You Use CUSTOM OFFICE?</b> .....	3
<b>Registering IIG products</b> .....	4
<b>ODBC Security</b> .....	5
<b>Role Maintenance</b> .....	5
<i>Introduction</i> .....	6
<i>Duplicate Customer Tracking Options</i> .....	6
<i>Duplicate Customers Lookup</i> .....	8
<b>Customer Maintenance</b> .....	8
<b>Bill To Customer Maintenance</b> .....	11

## Installation Instructions and Cautions

**PLEASE NOTE: SAGE 100 ERP** must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 ERP installation and setup now; then allow any updating to be accomplished automatically.

Once SAGE 100 ERP installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

### Wait! Before You Install – Do You Use CUSTOM OFFICE?

**THIS IS AN IMPORTANT CAUTION:** If you have Custom Office installed, **and** if you have modified any SAGE 100 ERP screens, you must run **Customizer Update** after you do an enhancement installation.

**But wait! BEFORE** you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**

The screenshot shows a software window titled "sage\* Sales Order Entry (ABC) 5/22/2015". The asterisk in the title bar is highlighted by an arrow from the text box on the right. The window interface includes a search bar, navigation buttons, and several tabs: "1. Header", "2. Address", "3. Lines", "4. Totals", and "5. Credit Card". Below the tabs are input fields for "Order Number", "Order Date", "Order Type", "Customer No.", "Cust PO", "Ship To Addr", "Terms Code", and "Ship Date".

## Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the SAGE 100 ERP.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement	5.10		AAAAAAAAAAAAAAAA	BBBBB

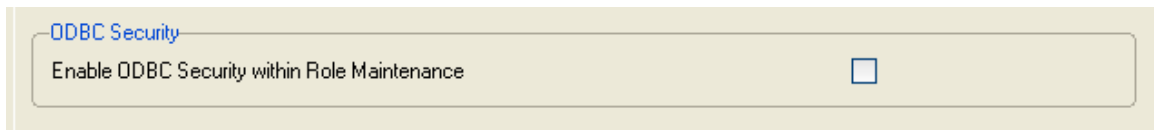
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

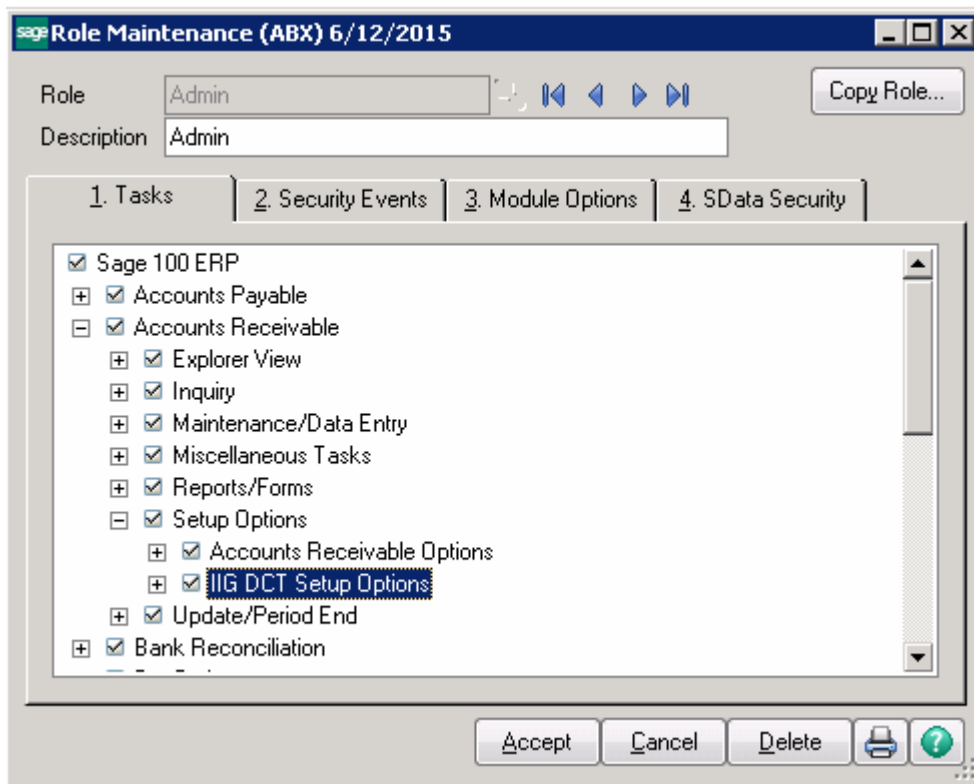
## ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.



## Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.



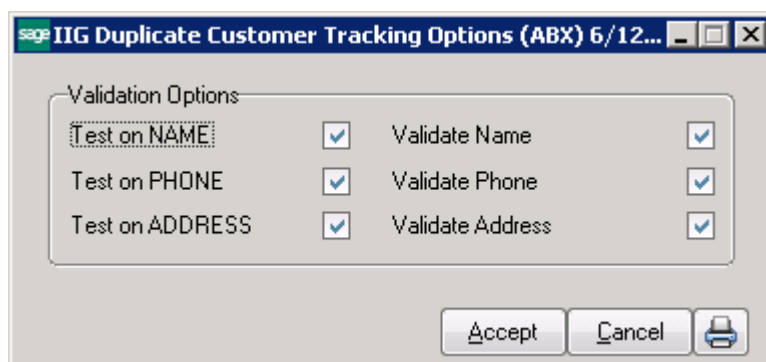
## Introduction

The **IIG Duplicate Customer Tracking** enhancement enables control over entering customers with **Name, Phone, Address** matching to existing customer Name, Phone or Address.

## Duplicate Customer Tracking Options

The **IIG Duplicate Customers Tracking Options** program has been added under the **Accounts Receivable Setup** menu.

Open the Options screen.



You can select **Validation Options**, including testing if there are Customers with same Names, Phones, Addresses, and validating Names, Phones, Addresses to be non-empty.

Check the **Test on NAME** box to enable looking for Customers with the same Name.

Check the **Test on PHONE** box to enable looking for Customers having the same Phone number.

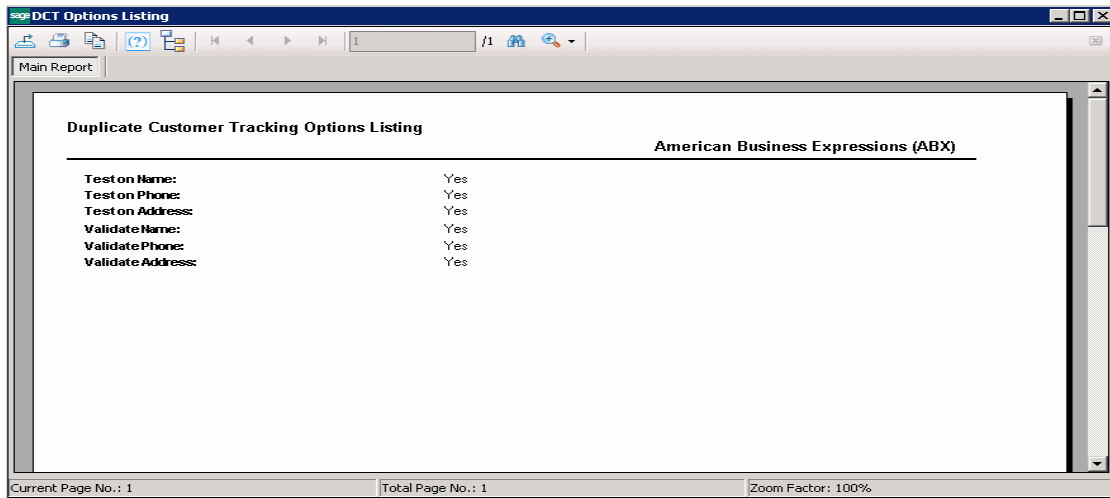
Check the **Test on ADDRESS** box to enable looking for Customers with the same Address.

Check the **Validate Name** box to not allow blank Bill To Customer Name.

Check the **Validate Phone** field to not allow blank Bill To Customer Phone number.

Check the **Validate Name** box to not allow blank Bill To Customer Address fields. If the validate options are not set, the blank fields will not be taken into account while checking for duplicated customers.

You can preview/print the **DCT Options Listing**.





## Duplicate Customers Lookup

### Customer Maintenance

Enter new customer in the **Customer Maintenance** program under the **Accounts Receivable Main** menu.

Customer No. 01-0000014  
Name American Business Futures \*\* NEW \*\*

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: 92618  
City: Irvine State: CA  
Country: USA United States of America  
Residential Addr:   
Salesperson: 0300 Susan Maye  
Telephone: (949) 555-4787 Ext: 219  
Fax:

Terms Code: 01 Net 30 Days  
Primary Contact: ARTIE JOHN  
Ship Code: YELLOW  
Primary Ship To:

Tax Schedule: CA California Exemptions...  
Credit Hold:   
Credit Limit:  .00

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

Accept Cancel Delete Print Help

When saving customer information, checking for duplicate customers is performed.

If the Name, Phone, and Address fields' values (depending on the Options) match for one or more existing customers, the following Duplicate Customer screen is popup:

**Duplicate Customer (ABX) 6/12/2015**

Customer No.	01 - 0000001	Navigation icons	7 Rec.
Name	American Business Futures		
Address	2131 N. 14th Street Suite 100		
City/State	Irvine	CA	
Phone #/Ext	(949) 555-4787	219	
Duplicate by name	Y		
Duplicate by phone	Y		
Duplicate by address	Y		

OK Cancel

You can view in this screen the Customers with the duplicating information. The Name, Phone and Address are displayed for each customer, and the fields, by which information is duplicated, are indicated.

Click **OK** to save the customer record disregarding the fact that information is duplicated.

Click **Cancel** to discard the entered customer information and cancel the new record.

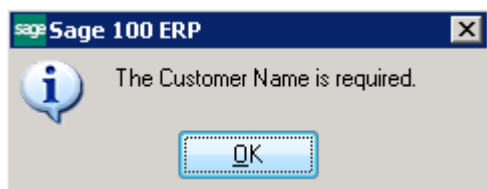
The checking for duplicated customers is performed also for existing customer, if any change is made in the customer's record and saved by clicking the **Accept** button.

The same program checks for duplicating customers when entering new customer from the **Sales Order Entry** screen.

Depending on the **Validate** check boxes in the **Options**, the program also checks the fields to not be blank.

For instance, enter a new customer, leaving some or all of the **Name**, **Telephone** or **Address** fields blank.

When leaving blank the Customer Name field, you will receive the following message:



And the new Customer will not be accepted until entering the **Customer Name**.

If there are any other blank fields, corresponding prompt messages will be shown, and again you will not be allowed to proceed until entering all missing fields (but only those fields, for which the corresponding validation checkbox is selected in the **Duplicate Customers Tracking Options**).

Bill To Customer Maintenance

If the **Bill To Customer Reporting** is enabled in the system, checking for duplicated customer is performed and a message is popup when the selected **Sold to Customer** has Address, Phone, Name records matching with the Bill To Customer's Address/Phone/Name records.

