

ZipAssist User Guide

*Build 26 of ZipAssist
for GP2013*

ZipAssist Build

Version: 13.00.26

System Requirements

Microsoft Dynamics 2013

Microsoft SQL Server 2005 or Higher

Contact Us

For more information, pricing details or to schedule a demo, please contact us at:

Sales:

- 610.983.3100 option: 1
- sales@accountable.com
- www.accountable.com

**A Guide for the
Administration,
Installation &
Implementation
of ZipAssist**



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Trademarks

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Installing ZipAssist

This section explains how to install ZipAssist™ software and is divided into three sections:

- *INSTALLING ZIPASSIST DATA FILES* describes how to install the ZipAssist Addressing Data Files.
- *INSTALLING ZIPASSIST CLIENT* describes how to install the ZipAssist code files that work with Microsoft Dynamics™ GP.
- *REGISTERING THE SOFTWARE* shows you how to acquire and enter valid registration keys to register the product.

Installing ZipAssist Data Files

ZipAssist uses U.S. Postal Service database files to determine the appropriate Zip+4 zip code for all U.S. addresses. These database files are included on your CD in compressed format.

Because these files are now compressed, they cannot be used without being installed with a setup program. These files are typically installed to a shared network folder, but can also be installed to a local directory. This installation requires a minimum of 640 Meg of free space on the hard drive on which the data files will be installed.

To install these data files, choose >Install Latest ZipAssist Data from the CDSetup.exe main screen. Follow the onscreen directions to complete the installation.

Installing ZipAssist Client

The installation of ZipAssist Client is a three-step process that must be completed on all workstations from which you intend to use ZipAssist. Installation must be performed while logged in as a user with rights to install software and modify registry keys (typically Administrator).

- 1. Install ZipAssist code files.**
- 2. Include the new code in the Client Application. Initialize SQL Tables.**
- 3. Specify the location of the Data files (only once, usually a shared network location for all workstations)**

1. Install ZipAssist code files.

- Insert the ZipAssist CD into the CD-ROM. The CD is required for installation, because it contains the Addressing Data that is required for use of ZipAssist.
- The setup program should start as soon as you insert the CD into the drive. If it does not launch automatically, then it may be started manually by selecting **Start » Run** from the Windows Taskbar and selecting the application “cdsetup” on the CD.

The installation program begins with a “Welcome” window.

- Click **Next>**.

Review the license agreement, and confirm your acceptance to the terms described within.

- Click **Yes**.

Select the folder where the Microsoft Dynamics™ GP Application is installed. This folder is typically located on your local hard drive.

The install program will attempt to find your current Microsoft Dynamics™ GP installation.

- Verify that the desired directory is displayed as the destination folder, or use the **Browse...** button to select the location of the correct directory.
- Click **Next>**.
- Choose the setup type. You should select Typical unless you need to select individual components for installation.
- Click **Next>**.
- The setup program will then begin to copy all files to the appropriate directories.

The installation of ZipAssist has been completed.

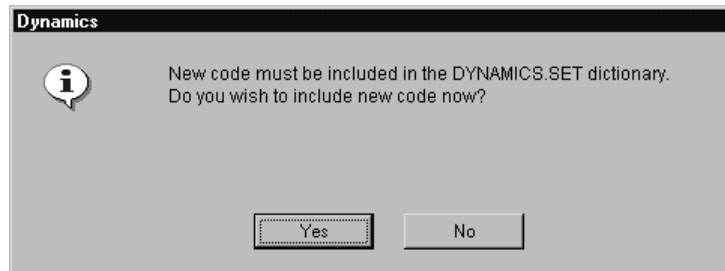
- Click **Finish**.

2. Include the new code into Microsoft Dynamics™ GP Client

Once the ZipAssist code files have been copied to your system, you then need to have the Application “include” the code.

- To do so, start the Application.

You will see a prompt asking you if you want to include the new code, as shown in the following illustration.



- Click **Yes**.

A progress bar will display, while the “unchunking” process is executing:

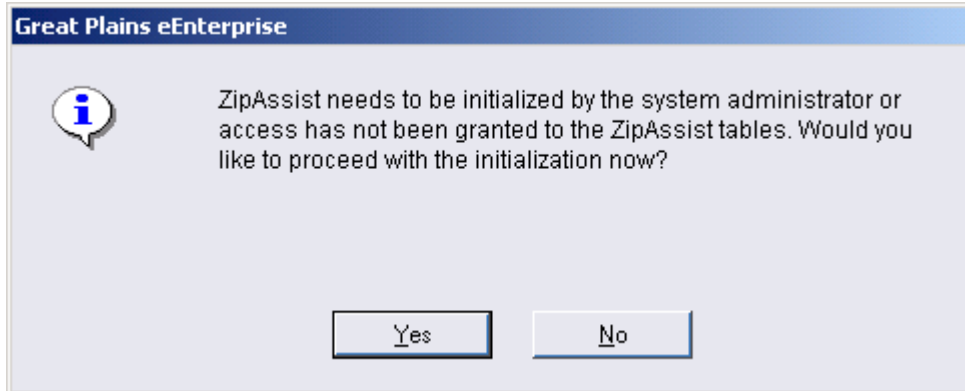
The following will occur:

- Your DYNAMICS.SET file will be modified to include the information required to run ZipAssist.
- A dictionary named “ZIP1513.DIC” will be created in your Application folder.

SQL Database Only: Initialize the ZipAssist Setup Tables.

For the first Client only, log in as 'sa', and Initialize/Update ZipAssist Tables if asked. This will Create/Update the ASI1513x Tables in the Company Databases. Repeat this step, logging in for each Company.

If this dialog does not appear, then The Tables are already in place.



3. Specify the location of the Addressing Data Files

If this is the first installation of ZipAssist, the first time a window containing an Address is opened on each client; ZipAssist will prompt for the location of the Addressing Data Files. (Example: "Locate address.cas"). Browse to the location where the data was installed, and save. This path will be saved in the c:\Windows (or WINNT) Operating system folder of the Client in the **mrnk.ini** file.

Registering the Software

By registering your copy of ZipAssist, you will enable us to keep you informed of all enhancements, improvements, and upgrades for the software. Also, by communicating with you, we can gather information about how you think ZipAssist could be improved or about additional enhancements that would enable us to continue *Enhancing The Experience* for you. Software registration can also eliminate unauthorized use of software without imposing restrictive copy protection.

Registration Keys are required to run ZipAssist in a production environment. Accountable Software provides the registration keys. Registered users of ZipAssist should be enrolled in the Enhancement plan for ZipAssist, which will provide them with the bi-monthly CDRom updates needed to keep their address data up to date. For more information or to obtain your registration keys, please call (484) 875-0600 or email ASIsales@accountable.com.

To register the ZipAssist software:

- 1. Respond to the prompt Dialog. (or open the registration window manually)**
- 2. Enter your Registration keys. Press the 'Register' Button.**
- 3. Close the Registration window.**

1. Respond to the prompt Dialog (or open the Registration window).

- Start the Application, and Log in.

When starting Microsoft Dynamics™ GP, respond to the prompt Dialog that informs you that you are running an unregistered version by clicking **Register**.

If you do not receive this prompt Dialog, Open the registration window manually by choosing the menu entry Help->About Microsoft Dynamics™ GP..., and then, while the About Microsoft Dynamics™ GP Window is open, choose the **Extras** Menu, ZipAssist Entry. (The Extras menu will appear only while the About Microsoft Dynamics™ GP Window remains open.)

2. Enter your Registration keys.

- Enter the keys exactly as you received them from us.

If you received the keys via email, simply cut and paste the keys into the appropriate field(s) on the form.

- Click **Register**.

If you mistyped the key, you will receive a warning message. Try again. If you still receive a warning, contact Accountable Software for assistance.

3. Close the Registration window.

- If the module(s) you are registering now appears with a checkbox in its **Registered** column, click the "close" button to close the Accountable Software Registration window.

Customer Support

Accountable Software Customer Support is available Monday through Friday from 9:00 am to 5:00 pm EST.

Customer Support can be reached in the following ways:

610.983.3100 (voice)
610.983.3160 (fax)
TechSupport@accountable.com
<http://www.accountable.com>

When you call, fax or emails Accountable Software for support please include the following information:

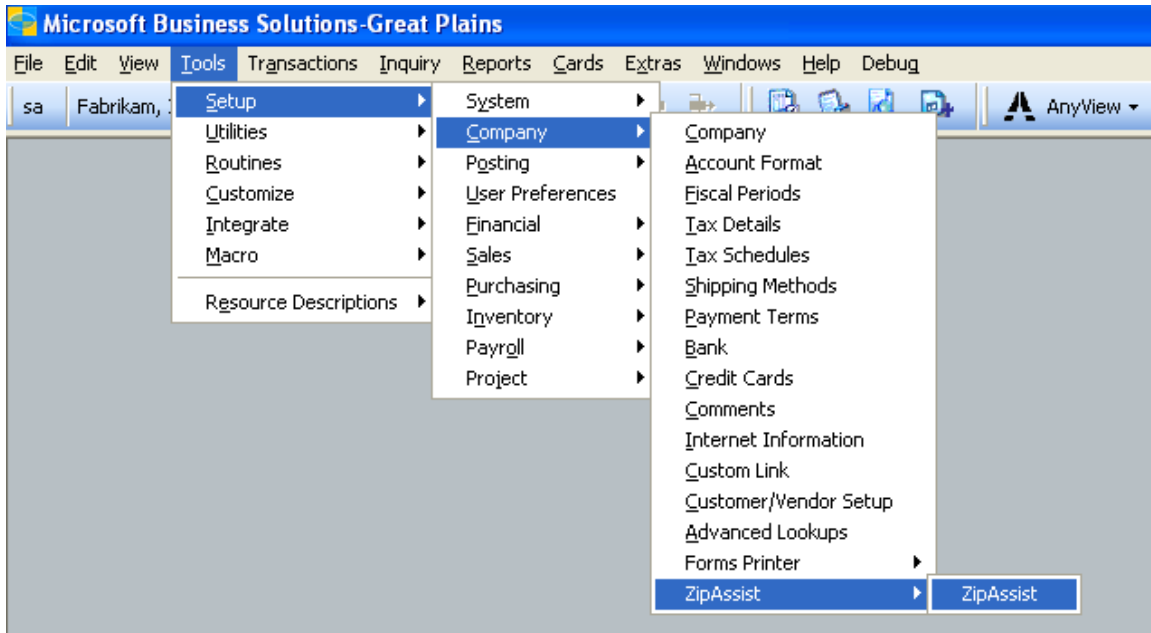
- Your company name and phone number.
- Your name.
- The name of the product you are working with and the version you are running (from the registration window).
- A brief description of the problem.

In addition, have this manual available when you are connected with Customer Support—you may be directed to various pages in the manual as you are helped with your problem.

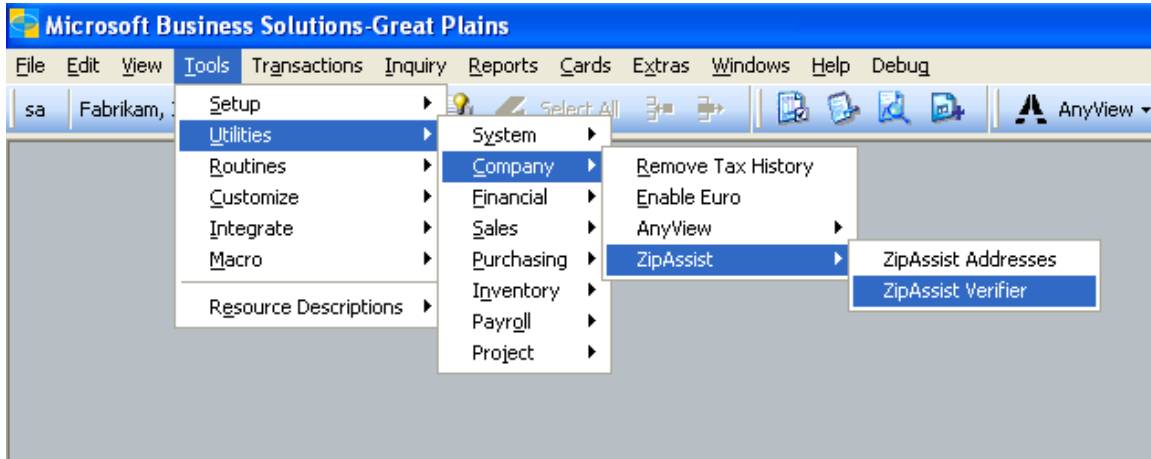
Please be aware that all technical support issues are chargeable unless the issue you are calling about is a result of a defect in an Accountable Software product or accompanying documentation.

ZipAssist Window Navigation

The following items are added to your Microsoft Dynamics™ GP menu during ZipAssist Initialization:



The menu entry above provides access to the ZipAssist Setup Window for the current company.



The menu entry above provides access to the ZipAssist Mass Modify, and ZipAssist Verifier Windows for the current company.

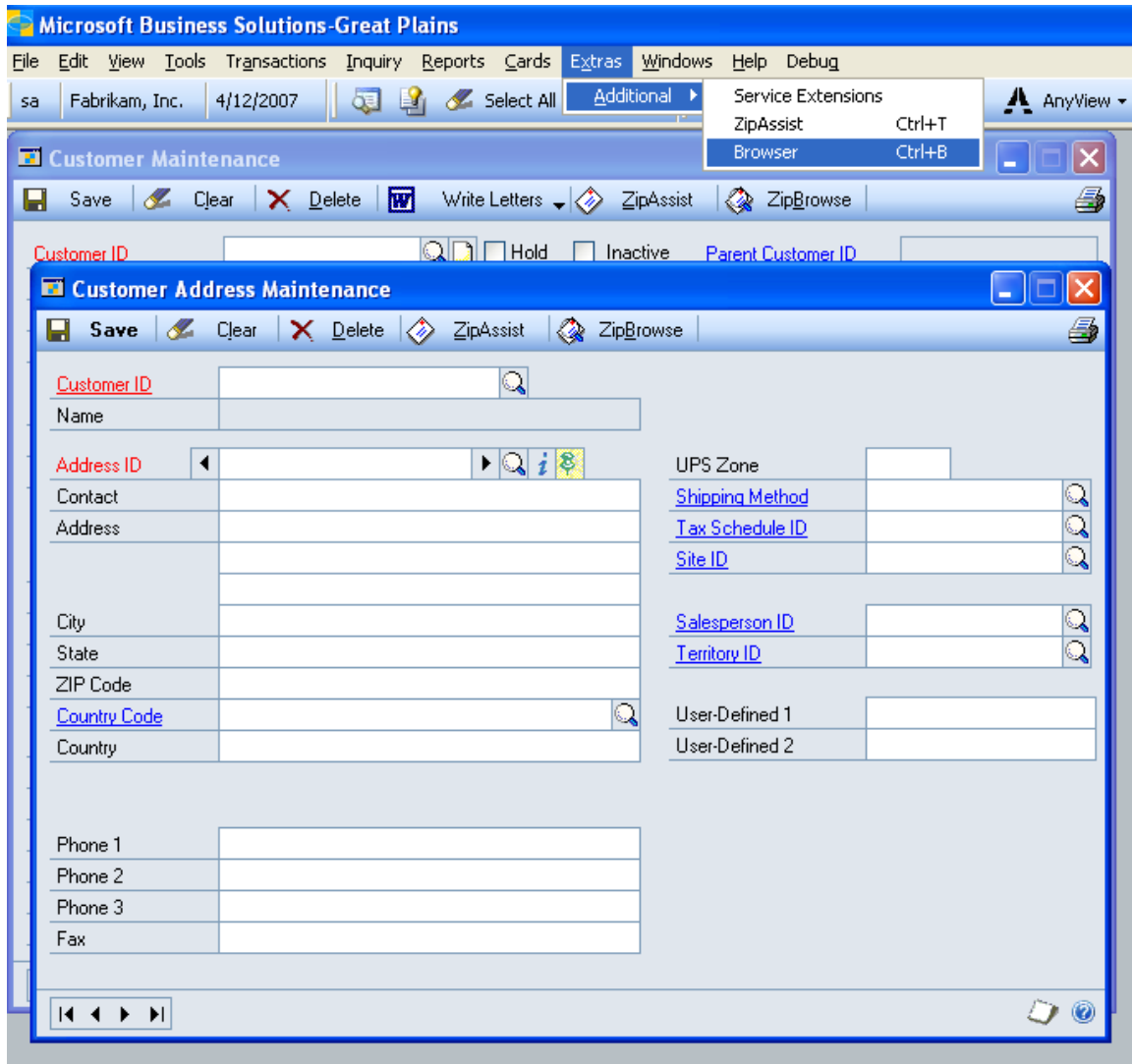
The actual Window Names for the Zipassist Menu items are shown below. These names can be used to add these Windows to the Microsoft Dynamics™ GP Shortcut bar.

| Item | Series | Window Name |
|---------------------|---------|----------------------------|
| ZipAssist | Company | ZipAssist Setup |
| ZipAssist Addresses | Company | ZipAssist Mass Modify |
| ZipAssist Verifier | Company | ZipAssist Address Verifier |

Grant Security to Alternate Windows - Optional

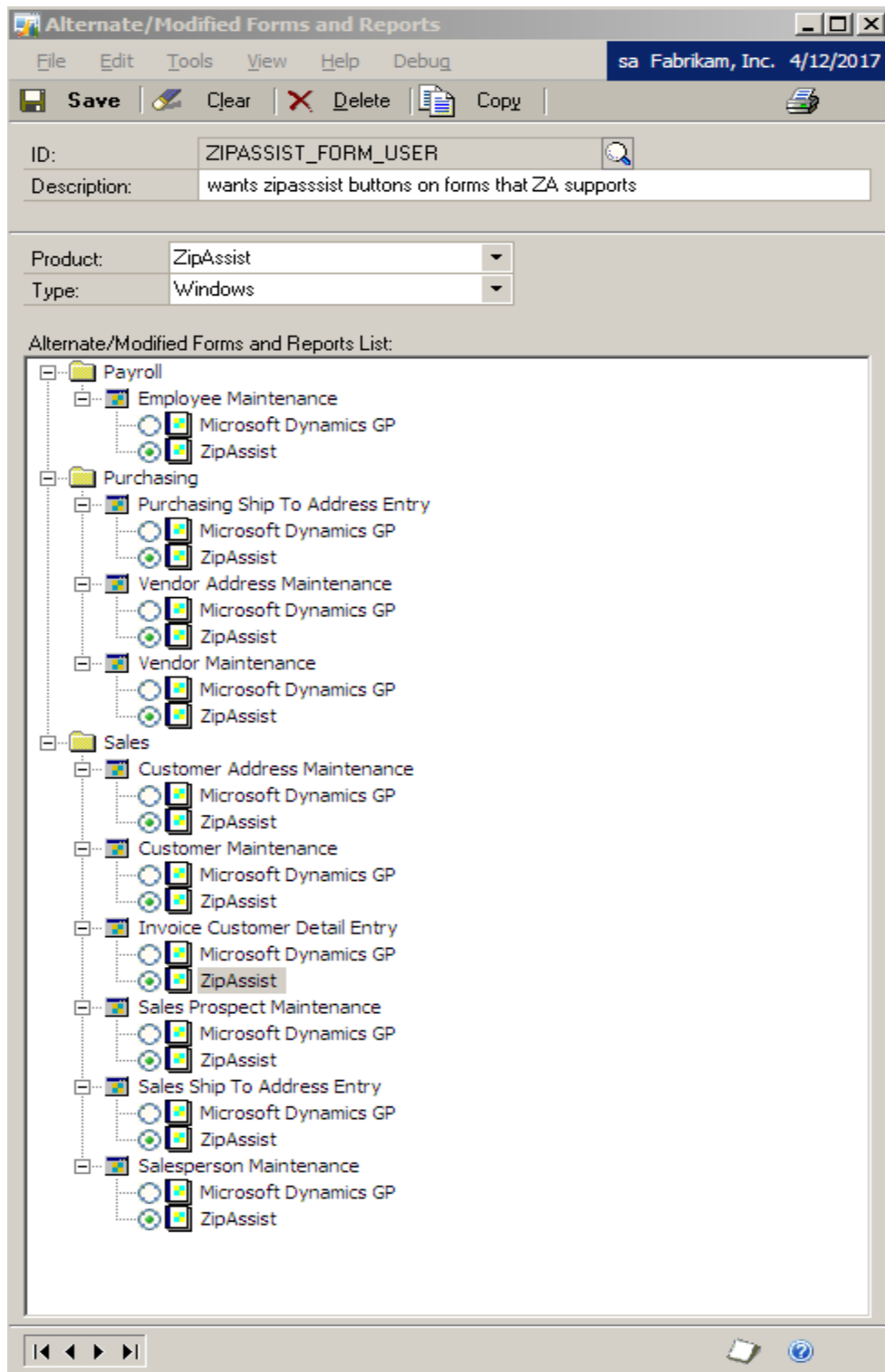
| Series | Window Name | Required |
|------------|----------------------------------|----------|
| Sales | Customer Address Maintenance | Optional |
| Sales | Customer Maintenance | Optional |
| Sales | Salesperson Maintenance | Optional |
| Sales | Invoice Customer Detail Entry | Optional |
| Sales | Sales Prospect Maintenance | Optional |
| Sales | Sales Customer Detail Entry | Optional |
| Purchasing | Vendor Maintenance | Optional |
| Purchasing | Vendor Address Maintenance | Optional |
| Purchasing | Purchasing Ship To Address Entry | Optional |
| Payroll | Employee Maintenance | Optional |

ZipAssist utilizes, but does not require, the use of the Alternate Microsoft Dynamics™ GP Windows listed above. The ZipAssist Alternate Windows add 2 buttons: a button that performs the address verification; and a Button that opens the Zip Browser Window. If you decide not to use these Alternate Windows, ZipAssist Address correction and Address browsing will be accessible from the Extras menu associated with the standard version of these windows. (Seen also in the screenshot of the alternate window below.)

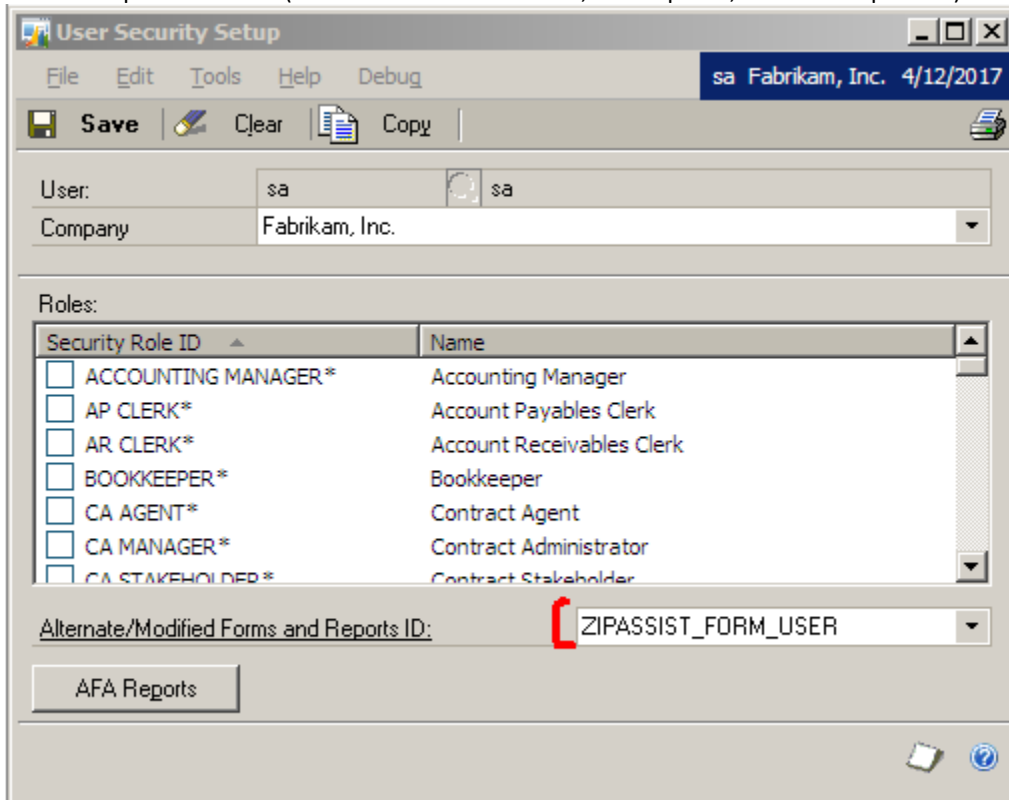


Example Alternate Window – Showing ZipAssist and ZipBrowse Buttons added to Windows, and “Extras Menu” Choices for Address Verification and Browsing.

Use the Application security window that is normally used by your organization to grant security to the alternate windows documented above, and shown below:



Use Dynamics GP User Security Setup to apply a Modified Forms ID to the users that need to have the modified Zipassist forms. (these forms are OPTIONAL, not required, for use of ZipAssist.)



ZipAssist Setup Window

This Window is used to set up ZipAssist for the Current Company.

Menu Entry: Tools >> Setup >> Company >> Zipassist >> ZipAssist

Modify Type

You may choose to have ZipAssist update your addresses and zip codes automatically as they are entered OR have ZipAssist update your addresses only when you choose.

Manual: If the Manual Button is chosen, ZipAssist will update/verify addresses and zip codes when the ZipAssist button is clicked, or by the keyboard combination of ALT+Z, if you are using the appropriate Alternate Window. You may also activate ZipAssist from the Extras Menu, or the keyboard combination of CTRL+T.

Automatic: If the Automatic Button is chosen, additional options are enabled so that ZipAssist will automatically update address and zip code information without any additional intervention.

Verify address when field changes

When the Modify Type is set to Automatic, you have the option to have ZipAssist attempt to verify/update the address and zip code information after data is entered in the Business Name (United Kingdom database only), City, State, Zip Code and Country fields.

You may select any of these options in any combination. After an address line is entered, the entry of data into any of the selected fields will cause ZipAssist to attempt to create any address and zip code match.

The recommended option is to use ZipAssist with the zip code button checked for automatic update (if using the United Kingdom database it is recommended to also select the Business Name option). It is also recommended that you use the Microsoft Dynamics™ GP Modifier to change the tab order of your address fields so that the cursor moves in the following order:

- 1) Address Line 1
- 2) Address Line 2
- 3) Zip Code
- 4) City
- 5) State

If you enter many foreign addresses, the recommended tab order is

- 1) Address Line 1
- 2) Address Line 2
- 3) Country
- 4) Zip Code
- 5) City
- 6) State

Example:

When the City, State and Zip Code boxes are all checked in [Verify Address When Field Changes](#), the following would occur: if the street address of 412 Creamery Way Suite 100 is entered, and then Exton is entered in the City Field, Zip Assist will attempt to complete the address and you would receive a message that ZipAssist could not verify the address from the data entered. By clicking okay and then entering PA in the State field, ZipAssist will then complete the address by filling in the zip code.

By contrast, if only the Zip Code box is checked in the Verify Address When Field Changes setup, the address and zip code would not be verified until after a zip code was entered into the Zip Code field.

Default Database

This selection is used to instruct Zip Assist on how to treat addresses where the Country field is blank. If a database is selected in this option, ZipAssist will attempt to verify all addresses with a blank Country using the selected database. If "(none)" is selected in this option, ZipAssist will not attempt to verify any address where the Country field is blank.

Silent Mode

By default, ZipAssist will display a message when it attempts to verify an address and is unsuccessful. Selecting the Silent Mode option will stop these messages from being displayed.

Country Database Options

Database

This section allows you to set options for each registered ZipAssist database.

Set Regular Text To UPPERCASE

When this option is selected, all address information will be replaced by UPPERCASE text when ZipAssist verifies an address.

Example:

When the address 412 Creamery Way suite 100, exton, PA is entered, ZipAssist will return 412 CREAMERY WAY SUITE 100, EXTON, PA 19341-2500 when it verifies the address.

Auto Browse

When this option is selected the ZipBrowse address lookup window will automatically open, if an address cannot be verified. This allows the user to search for the correct address.

Verify Address When Country Equals

This field is used to instruct ZipAssist how to recognize addresses based upon the Value entered in the Country field.

Modify Country

- 1) Don't Change: ZipAssist will not modify the Country field.
- 2) Specific Value: ZipAssist will modify the Country field to the specified value.
- 3) Don't Change: ZipAssist will modify the Country field to the value returned from the address verification database if it is different from the entered value (this applies only to certain UK Addresses)

Example:

The screenshot shows the 'ZipAssist Setup' dialog box. The 'Country Database Options' section is highlighted. It includes a 'Database' dropdown set to 'United States', a checked 'Set regular text to UPPERCASE' checkbox, and an unchecked 'Auto Browse' checkbox. Below this is a 'Verify address when country equals' text field and a 'Modify Country' dropdown set to 'Don't Change'. At the bottom, there is a table with columns 'Verify Country', 'Modify Type', and 'Modify To'. The table contains three rows: 'U.S' with 'Specific Value' and 'US', 'U.S.A' with 'Specific Value' and 'US', and 'US' with 'Don't Change' and an empty 'Modify To' field. There are 'Insert', 'Delete', and 'Delete All' buttons to the left of the table.

| Verify Country | Modify Type | Modify To |
|----------------|----------------|-----------|
| U.S | Specific Value | US |
| U.S.A | Specific Value | US |
| US | Don't Change | |
| | | |
| | | |

In the above example, the United States database will be used to verify all addresses in which the Country field contains "U.S", "U.S.A" and US. If the Country field contains "U.S" or "U.S.A" it will be changed to "US".

ZipAssist Zip Browser

The Zip Code Browser can be accessed from the Extras menu, or from the ZipBrowse Button on Alternate windows. It can also be auto-opened if the AutoBrowse Setup Window option is checked.

The Zip Code Browser is your address and Zip Code directory. In this window you can manually look up any address contained in the Zip Code database. The Zip Code Browser is a fundamental mailing tool, as it allows you to search for and find specific addresses. This may be useful when ZipAssist is having difficulty automatically correcting a specific address.

The screenshot shows the Zip Browser window with the following data:

| Address Entry | | Pre ... | Street Name | Suffix | Post ... |
|---------------|-------------------|---------|--------------|--------|----------|
| State: | PA | E | LANCASTER | AVE | |
| City: | EXTON | W | LANCASTER | AVE | |
| Address: | 204 Lindenwood Dr | | LANCASTER | PIKE | |
| | | | LANDERS | CT | |
| | | | LANGSTON | CIR | |
| | | | LAUREL | LN | |
| | | N | LAUREL | LN | |
| | | | LAUREL MOORS | DR | |
| | | E | LINCOLN | HWY | |
| | | W | LINCOLN | HWY | |
| | | | LINDENWOOD | DR | |

| E/O | Primary | Building/Firm | E/O | Secondary | Zip+4 | DP/CD |
|-----|---------|---------------|-----|-----------|------------|-------|
| B | 1-10 | | | | 19341-2109 | |
| B | 11-26 | | | | 19341-2135 | |
| B | 27-38 | | | | 19341-2137 | |
| B | 39-46 | | | | 19341-2147 | |
| B | 47-99 | | | | 19341-3104 | |
| B | 100-182 | | | | 19341-2164 | |
| B | 183-194 | | | | 19341-2166 | |
| B | 195-206 | | | | 19341-2167 | 042 |
| B | 207-218 | | | | 19341-2171 | |
| B | 219-230 | | | | 19341-2172 | |
| B | 231-242 | | | | 19341-2173 | |
| R | 243-254 | | | | 19341-2110 | |

The Zip Code Browser will automatically search for a specific address when it is launched, filling in all of the address element fields for which it can find a unique match. You can also enter search criterion manually. The more address elements you include in your search criteria, the more refined your results will be.

Change any element(s) in the Address Entry section of the window to begin the search. All addresses that match your search criteria are shown in the lower section of the window.

If there is only one address that matches your search criteria, a single line will appear in the Results section, and you may click **Update** to update the record. If your search returned multiple matches in the Results section, use the scroll bars to locate the specific address you are looking for. When found, click on the address to highlight it, and click **Update** to update the record. You can also click **Cancel** to close the Zip Code Browser window without returning an address to the originating entry window.

ZipAssist Mass Modify

- ZipAssist Mass Modify is a utility that will allow you to update all the addresses stored in Microsoft Dynamics™ GP on a regular basis. It searches the addresses you select and compares them to the most recent addresses supplied on your current address CD. In a standard install, access to this window is made through the Menu entry:

Tools >> Utilities >> Company >> ZipAssist >> ZipAssist Addresses

It is recommended that you use the ZipAssist Mass Modify utility each time you receive a new CD from Accountable Software. The US Postal Service updates approximately 100,000 addresses per quarter.

Selection Options

Report Options

If no options are selected, ZipAssist will update records without printing a report. All changes will be written to the log file.

Updated Without Warnings

The ZipAssist Log file will be printed showing a list of all records updated.

Updated With Warnings

The ZipAssist Log file will be printed showing a list of all records updated and warning messages for each address if they occurred.

Addresses Not Updated

The ZipAssist Log file will be printed showing a list of all records not updated.

Only Display Verifiable Addresses

The ZipAssist log file will only display addresses that will be verified based upon the settings from ZipAssist setup.

Any or all of these options may be chosen for your report.

Modify

Please select the address types you want to be verified and updated. Options include:

- Customers
- Vendors
- Employees
- Prospects
- Salesperson

The final checkbox, Combine Address Lines, allows you to indicate if you want to have ZipAssist analyze the Application fields Address 1 and Address 2 as a single address line, otherwise the standard logic will apply. The standard logic for addresses is that Address 1 will be used, unless Address 2 contains more than a few characters, in which case Address 2 will be used for the street address.

Select Addresses Button

Pushing the Select Address Button will allow you to select specific addresses you would like verified and updated. It will open the ZipAssist Mass Modify Detail window.

ZipAssist Mass Modify Detail Window

The ZipAssist Mass Modify Detail Window is used to select or exclude addresses from the mass modify process. You may zoom back to the Customer Maintenance window for a particular customer by selecting it, by checking the Modify box, and then moving your cursor over the Master Number field title and clicking. If the record already has a check in the Modify box, simply re-check the box and then move your cursor to the Master Number field title and click.

Modify

Modify executes the Mass Update process.

Mark All

Mark All selects all addresses in the list.

Unmark All

Unmark All clears the selection of all addresses in the list.

Cancel

Cancel closes the ZipAssist Mass Modify Detail Window.

Type

In the Type field drop down box, select the list of addresses you want to view for exclusion or inclusion in the modify process.

Only Display Verifiable Addresses

Checking this box will cause the display list to include only addresses that can be verified based upon the settings from ZipAssist setup.

Modify Check Box

If this box is checked, the address will be included in the address verification and update process.

ZipAssist Address Verifier Window

- The ZipAssist Address Verifier Window is a utility that will allow you to check all the addresses stored in Microsoft Dynamics™ GP on a regular basis. It searches the addresses for the types you select and compares them to the most recent addresses supplied on your current address CD. The results of this verification are then displayed on screen and can be printed using a summary or detailed report. The Verifier utility does not modify any addresses. In a standard install, access to this window is made through the menu :

Tools >> Utilities >> Company >> ZipAssist >> ZipAssist Verifier

Process

Begins the verification process.

Calculate

Returns the verification results to the screen without printing a report.

Print Detail Report

Upon completion of the verification process, the ZipAssist Address Verifier will print a detailed report of all addresses with errors. The invalid address is shown along with the error found.

Print Summary Report

Upon completion of the verification process, the ZipAssist Address Verifier will print a summary report listing the total number of records, total number of addresses checked and total number of errors found for each type selected.

Total Records

This column displays the total number of records for the selected address type.

Records Verified

This column displays the total number of records that were checked for the selected address type. This number may vary from the Total Records quantity if foreign addresses exist for the selected address type.

Records with Errors

This column displays the total number of records, based on the Records Verified total, found to have errors in the selected address type.