



ZIP Code Genie

User's Manual

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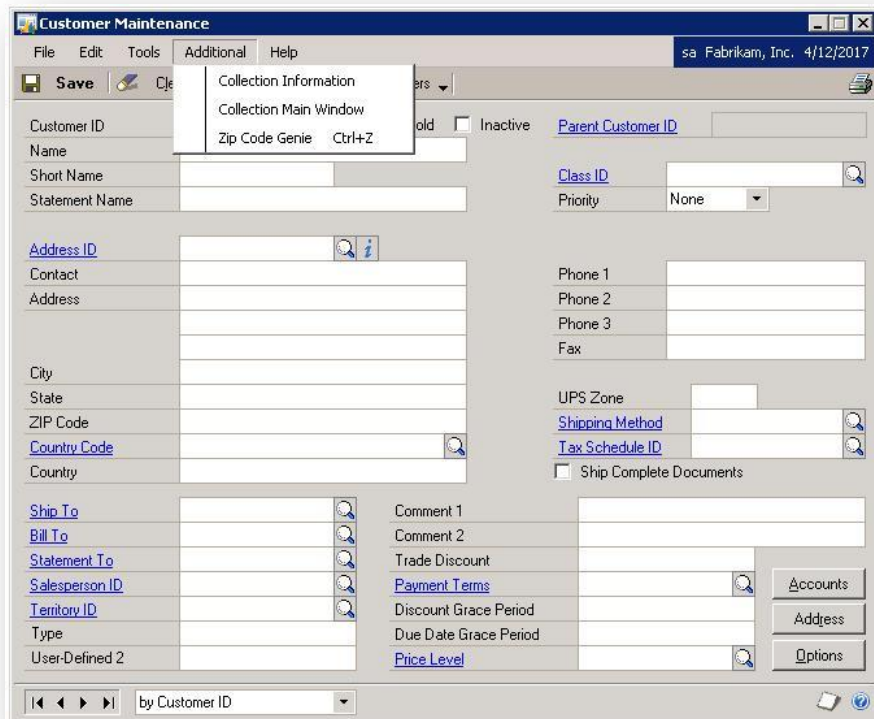
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ZIP Code Genie

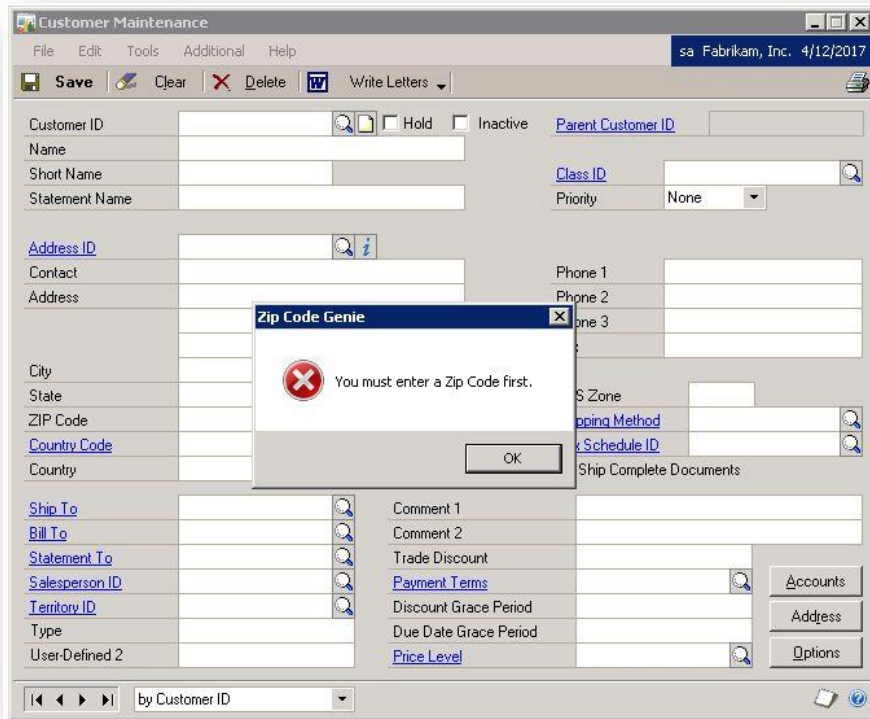
ZIP Code Genie automates the entry of City, State, Country Code, and Country using the ZIP Code. The City and State information is standardized based on the U.S. Postal Service ZIP Code database. The benefits of ZIP Code Genie are:

- Faster data entry
- Eliminate keying errors
- Accurate address information

ZIP Code Genie is invoked using the “Ctrl + Z” key combination or by selecting ZIP Code Genie from the “Additional” Menu.



The only requirement is that a valid ZIP Code is typed in the “ZIP Code” text box. If there is not a ZIP Code present then ZIP Code Genie will display the following error.



The following windows have ZIP Code Genie as an available option:

- Customer Maintenance
- Customer Address Maintenance
- Vendor Maintenance
- Vendor Address Maintenance
- Employee Maintenance
- Salesperson Maintenance
- Site Maintenance

Customer Maintenance

Customer Maintenance

File Edit Tools Additional Help sa Fabrikam, Inc. 4/12/2017

Save Clear Delete Write Letters

Customer ID: GENIE Hold Inactive Parent Customer ID:

Name: dynamicsGenie

Short Name: dynamicsGenie

Statement Name: dynamicsGenie

Class ID:

Priority: None

Address ID: PRIMARY

Contact:

Address: 111 Somewhere

Phone 1:

Phone 2:

Phone 3:

Fax:

City:

State:

ZIP Code: 60073

Country Code:

Country:

UPS Zone:

Shipping Method:

Tax Schedule ID:

Ship Complete Documents

Ship To: PRIMARY

Bill To: PRIMARY

Statement To: PRIMARY

Salesperson ID:

Territory ID:

Type:

User-Defined 2:

Comment 1:

Comment 2:

Trade Discount:

Payment Terms:

Discount Grace Period:

Due Date Grace Period:

Price Level:

Accounts Address Options

by Customer ID

Information highlighted that ZIP Code Genie filled in.

Customer Maintenance

File Edit Tools Additional Help sa Fabrikam, Inc. 4/12/2017

Save Clear Delete Write Letters

Customer ID: GENIE Hold Inactive Parent Customer ID:

Name: dynamicsGenie

Short Name: dynamicsGenie

Statement Name: dynamicsGenie

Class ID:

Priority: None

Address ID: PRIMARY

Contact:

Address: 111 Somewhere

Phone 1:

Phone 2:

Phone 3:

Fax:

City: ROUND LAKE

State: IL

ZIP Code: 60073

Country Code: US

Country: United States

UPS Zone:

Shipping Method:

Tax Schedule ID:

Ship Complete Documents

Ship To: PRIMARY

Bill To: PRIMARY

Statement To: PRIMARY

Salesperson ID:

Territory ID:

Type:

User-Defined 2:

Comment 1:

Comment 2:

Trade Discount:

Payment Terms:

Discount Grace Period:

Due Date Grace Period:

Price Level:

Accounts Address Options

by Customer ID

Customer Address Maintenance

The screenshot shows the 'Customer Address Maintenance' window for 'sa Fabrikam, Inc.' dated 4/12/2017. The 'Name' field contains 'dynamicsGenie'. A context menu is open over this field, showing options: 'Service Extensions' and 'Zip Code Genie Ctrl+Z'. Other fields include 'Address ID' (SHIPPING), 'Address' (222 Anywhere), 'City', 'State', 'ZIP Code' (60073), 'Country Code', 'Country', 'Phone 1-3', and 'Fax'. A 'Save' button is visible in the top left.

The screenshot shows the 'Customer Address Maintenance' window with the 'Name' field updated to 'GENIE'. The 'Address ID' is 'SHIPPING' and the 'Address' is '222 Anywhere'. The 'City' is 'ROUND LAKE', 'State' is 'IL', 'ZIP Code' is '60073', and 'Country Code' is 'US'. The 'Country' is 'United States'. The 'Phone 1-3' and 'Fax' fields are also present. A 'Save' button is visible in the top left.

Vendor Maintenance

Vendor Maintenance sa Fabrikam, Inc. 4/12/2017

File Edit Tools Options Additional Help

Save Clear Delete Write Letters

Vendor ID: Hold Status: Active

Name: Class ID:

Short Name:

Check Name:

Primary Address:

Address ID:

Contact:

Address:

Phone 1:

Phone 2:

Phone 3:

Fax:

City:

State:

ZIP Code:

Country Code:

Tax Schedule:

Shipping Method:

UPS Zone:

Address IDs:

Purchase:

Remit To:

Ship From:

Vendor Account:

Comment 1:

Comment 2:

Options Address Accounts

by Vendor ID

Vendor Maintenance sa Fabrikam, Inc. 4/12/2017

File Edit Tools Options Additional Help

Save Clear Delete Write Letters

Vendor ID: Hold Status: Active

Name: Class ID:

Short Name:

Check Name:

Primary Address:

Address ID:

Contact:

Address:

Phone 1:

Phone 2:

Phone 3:

Fax:

City:

State:

ZIP Code:

Country Code:

Tax Schedule:

Shipping Method:

UPS Zone:

Address IDs:

Purchase:

Remit To:

Ship From:

Vendor Account:

Comment 1:

Comment 2:

Options Address Accounts

by Vendor ID

Vendor Address Maintenance

Vendor ID:

Name:

Address ID:

Contact:

Address:

City:

State:

ZIP Code:

Country Code:

Country:

Phone 1:

Phone 2:

Phone 3:

Fax:

Tax Schedule:

Shipping Method:

UPS Zone:

EFT Bank:

Employee Maintenance

Employee ID:

Class ID:

Last Name:

First:

Middle:

Suffix:

Soc Sec Number:

Seniority Date:

Hire Date:

Adjusted Hire Date:

Last Day Worked:

Date Inactivated:

Reason:

SLITA State:

Workers' Comp:

Employment Type:

Address ID:

Address:

City:

State:

ZIP Code:

Country:

Phone 1:

Phone 2:

Phone 3:

Division:

Department:

Position:

Location:

Supervisor:

Additional Positions:

Human Resources:

Address:

Additional Information:

Site Maintenance

Site Maintenance sa Fabrikam, Inc. 4/12/2017

File Edit Tools Additional Help

Save Clear Delete

Site ID: 01-N
 Description: North Regional

Address: 1750 North Kingbury St
 City: Chicago
 State: IL
 ZIP Code: 60614
 Country Code: US
 Country: United States

Account Segment ID:
 Segment1:

Phone 1: (312) 664-3500 Ext. 0000
 Phone 2: (312) 664-2340 Ext. 0000
 Phone 3: (000) 000-0000 Ext. 0000
 Fax: (000) 000-0000 Ext. 0000

Tax Schedule ID:
 Sales: ALL DETAILS
 Purchases:

Bins Planning Assign

by Site ID

Salesperson Maintenance

Salesperson Maintenance sa Fabrikam, Inc. 4/12/2017

File Edit Tools Additional Help

Save Clear Delete

Salesperson ID: GREG E. Inactive
 Last Name: Erickson
 First: Gregory
 Middle: J

Employee ID: ERIC0001
 Territory ID: TERRITORY 2
 Vendor ID:

Address: 74 Logan Estates
 City: Carmel
 State: IN
 ZIP Code: 46032-8674
 Country: United States

Phone 1: (317) 555-0101 Ext. 0000
 Phone 2: (000) 000-0000 Ext. 0000
 Phone 3: (000) 000-0000 Ext. 0000
 Fax: (317) 555-0101 Ext. 0000

Percent: 3.00%
 Applied To: Sales Total Invoice
 Commission ID:

	Year-to-Date	Last Year
Total Commissions	\$27,361.72	
Commissioned Sales	\$912,052.47	
Non-Commissioned Sales		
Cost of Sales	\$240,940.52	

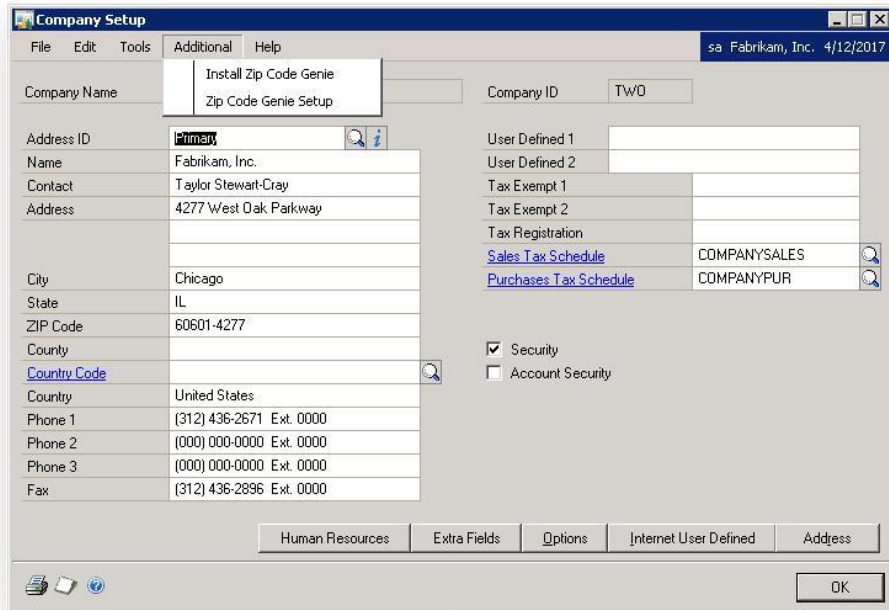
Maintain History: Calendar Year Fiscal Year

History

by Salesperson ID

Setup

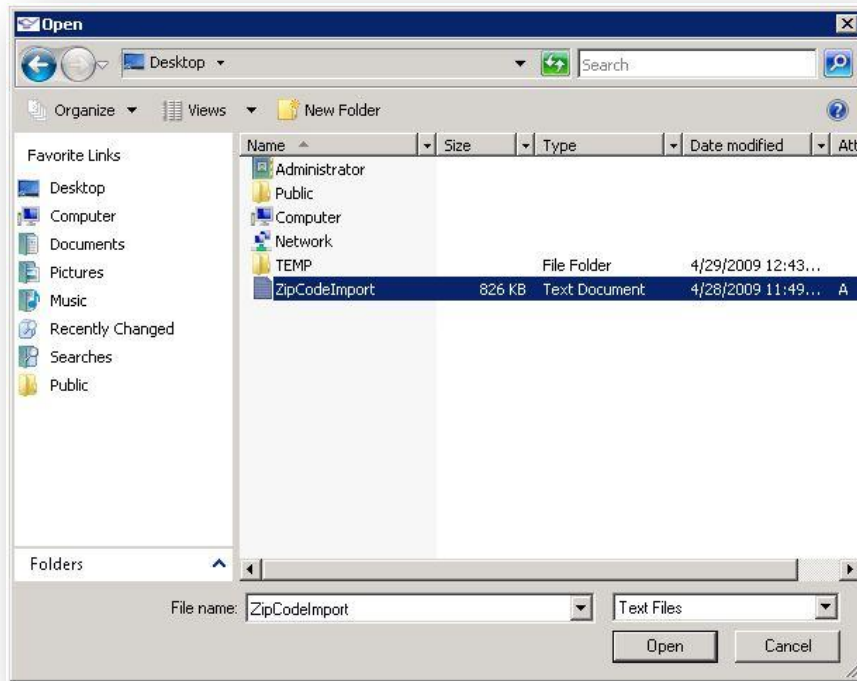
ZIP Code Genie is setup by using the “ZIP Code Genie Setup” selection on the Additional Menu within the Company Setup Window.



The ZIP Code data table needs to be initialized after ZIP Code Genie is installed. Click the “Import” Button on the Setup Window. This initialization only needs to be done once, regardless of the number of companies being used in Dynamics GP.



Browse to where you stored the ZIPCodes.txt file and Select it.



When the import is finished, ZIP Code Genie will display the following message.



After the import is successful you are ready to complete the setup. You have just a few options to decide.

- *Capitalize All letters*

With this option checked all City and State letters will be upper case



- *Full State Name*

By default ZIP Code Genie uses the standard 2 letter abbreviation for States; however, with this option checked the State name will be spelled out completely

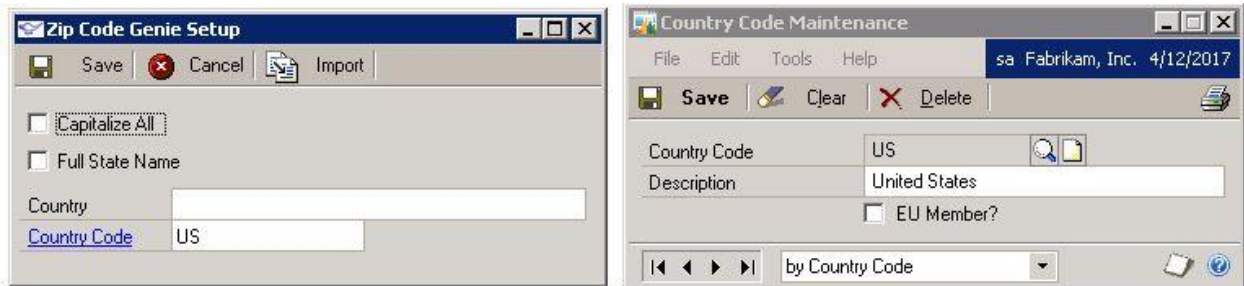
- *Country Description*

If you are using Country Codes then you don't need to complete this. If you are not using Country Codes then type in the Country Name as you would like it to appear.



- *Country Code*

Select the Country Code to use, you can check or create a Country Code by using the blue Zoom “Country Code” text to open up the standard Country Code Maintenance. There you can add “US” or “USA” (however you want it to appear) and the Description. When using Country Codes, the ZIP Code Genie “Country Description” is ignored.

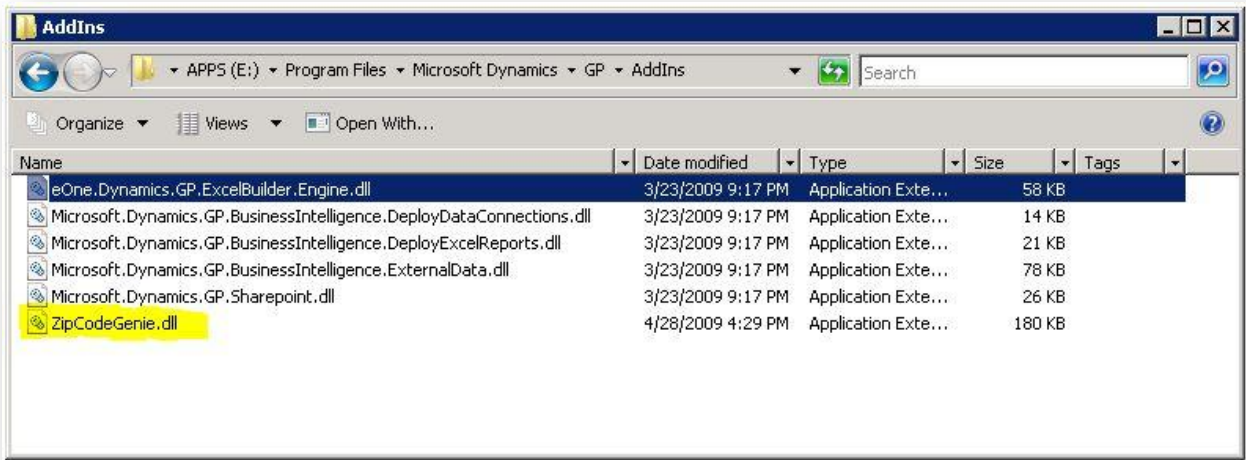


Installation and Registration

Installation

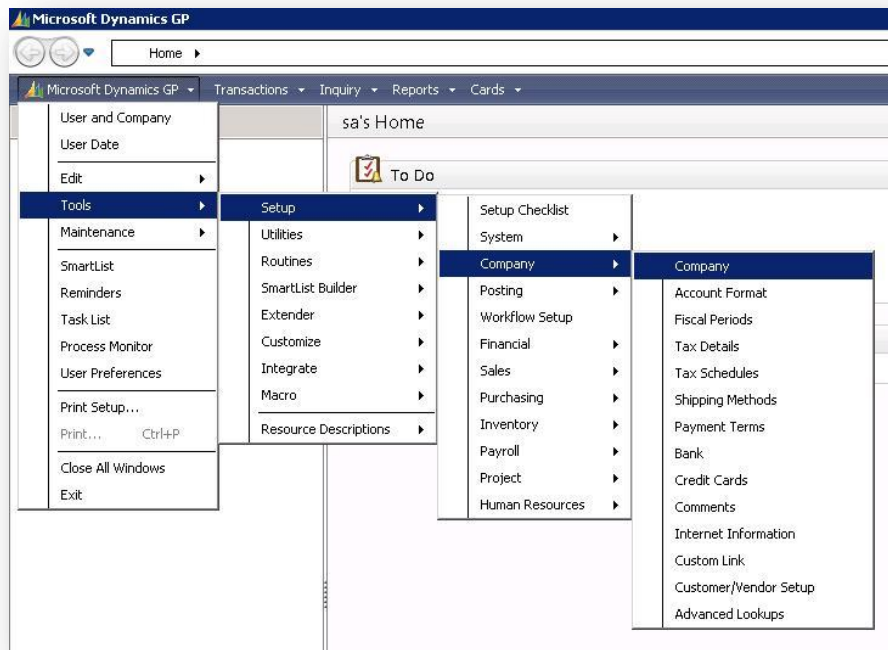
Copy DLL to GP AddIns Directory

The file “ZIPCodeGenie.dll” needs to be copied into the GP AddIns folder on every client and server that will be using ZIP Code Genie. Locate the AddIns folder, which is within the directory where the Dynamics GP client is installed, and copy the dll there. The GP client should not be running at the time you copy the file.

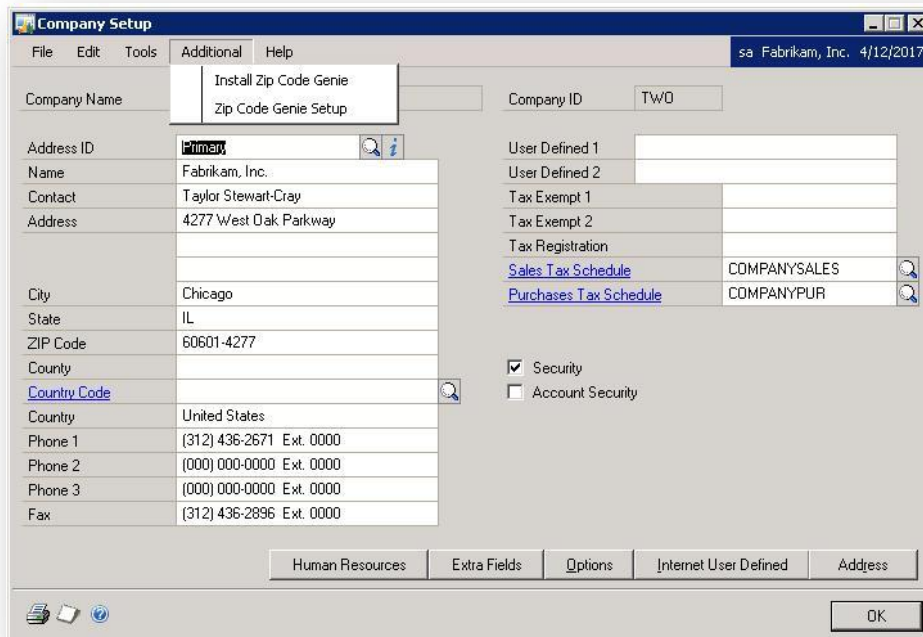


Company Setup

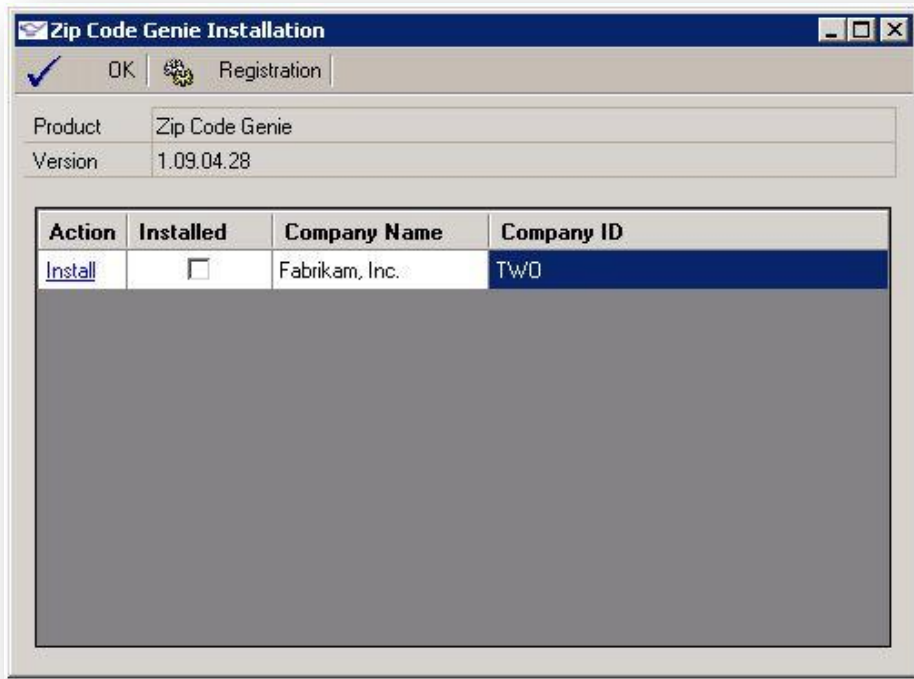
Once the dll is on the system, launch GP and login as "sa". Go to Tools>Setup>Company>Company.



Click on the "Additional" menu.

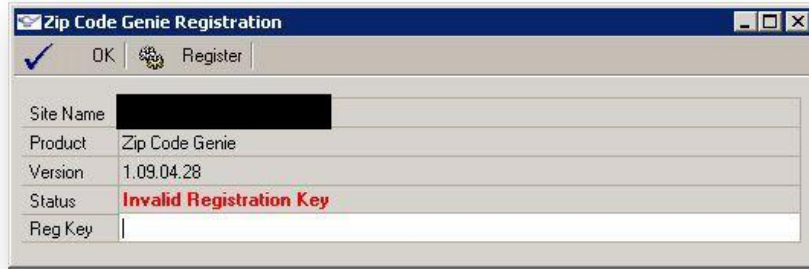


Click on “Install ZIP Code Genie” and the Installation window will display.



Registration

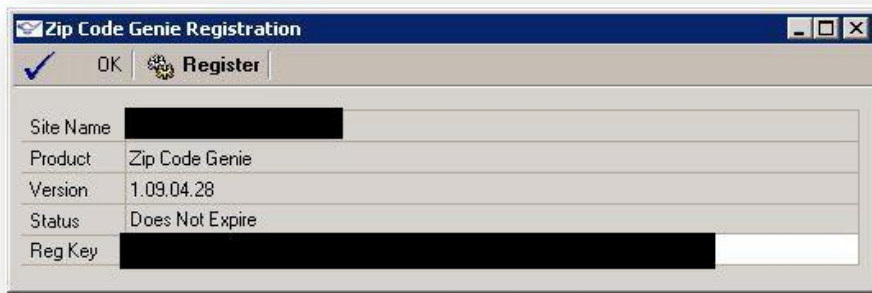
Before you can install it into any company, it must first be registered. Click the “Register” button and the registration window will appear.



The image shows a Windows-style dialog box titled "Zip Code Genie Registration". It has a blue title bar with a checkmark icon on the left and standard window controls on the right. Below the title bar is a toolbar with a checkmark icon, the text "OK", a gear icon, and the text "Register". The main area contains a table with the following data:

Site Name	[Redacted]
Product	Zip Code Genie
Version	1.09.04.28
Status	Invalid Registration Key
Reg Key	[Redacted]

Enter your registration keys and Click “Register” to validate them. If all is good you will get the status of your registration.

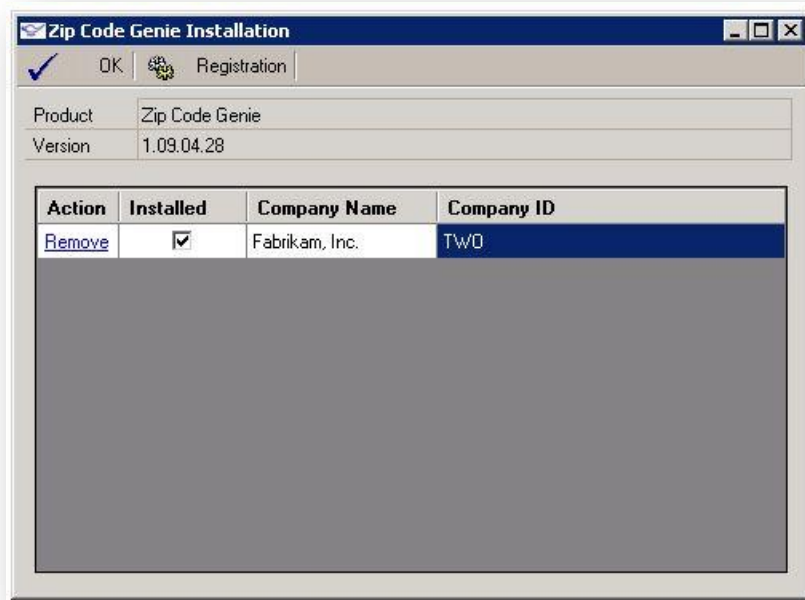


The image shows the same "Zip Code Genie Registration" dialog box. In this instance, the "Register" button is highlighted with a mouse cursor. The table data is as follows:

Site Name	[Redacted]
Product	Zip Code Genie
Version	1.09.04.28
Status	Does Not Expire
Reg Key	[Redacted]

Install

Clicking the “OK” button will get you back to the ZIP Code Genie Installation window. Click the blue “Install” action for each company that you want to use RID in. Upon successful installation the “Installed” checkbox will be checked and the Action will change to “Remove”.



Remove

To remove ZIP Code Genie from a company Click the “Remove” action and follow the prompts.

