

How do I set Address Book criteria for integration?

When Sage Construction Project Center synchronizes your Address Book contacts, it retrieves all active company contacts, and any person contacts associated with those companies. If you have a large address book, you might want to set criteria in order to filter the number of contacts you upload. You can do this in the integration setup's Additional Criteria area. This job reference explains how to enter criteria.

- The criteria you enter for these fields are applied to the ODBC table names shown here.

SAGE ODBC QUERY - ADDITIONAL CRITERIA	
Tables to which criteria apply:	
Companies Criteria	ABM_MASTER__COMPANY
Company Address Criteria	ABM_MASTER__COMPANY_PERSON_ADDRESS (company addresses)
Company Contacts Criteria	ABM_MASTER__PERSON
Person Address Criteria	ABM_MASTER__COMPANY_PERSON_ADDRESS (person addresses)

Save

Entries in the Company Address Criteria box are applied to:

ABM_MASTER__COMPANY_PERSON_ADDRESS where Address_Type <> 'Person business add'

Entries in the Company Contacts Criteria are applied to:

ABM_MASTER__COMPANY_PERSON_ADDRESS where Address_Type = 'Person business add'

- When you enter criteria in any of the fields, the system appends the text you entered to its existing query. You'll need to include AND or OR at the start of each string.

SAGE ODBC QUERY - ADDITIONAL CRITERIA (OPTIONAL)	
Companies Criteria	AND (ABM_MASTER__COMPANY.Date_Stamp > CURDATE()-4)
Company Address Criteria	AND Address_Type = 'Shipping address'
Company Contacts Criteria	AND Email_Address <> NULL OR Business_Fax <> NULL
Person Address Criteria	AND State = 'WA' ✕

Save

NOTE: Initially, we recommend that you enter this criteria for the Companies Criteria:

AND (ABM_MASTER__COMPANY.Date_Stamp > CURDATE()-4)

This filters companies such that only those that have changed in the past 4 days are uploaded. You can change this criteria to something more suitable once you are ready for Sage Construction Project Center to upload all of your Address Book companies.

- You can use the comparison operators = and <>. Do not use <= or >=.
- For string values, use single quotation marks.
- To set criteria for fields based on whether the value is empty, use NULL as the value. Do not use empty quotation marks, such as Type = ''.
- Only person records whose company meets the criteria for the company and company address fields are evaluated against further criteria. For example, if you use this criteria in the Companies Criteria box:

AND Company_Name = 'Acme Solutions'

any persons who do not belong to Acme Solutions are not evaluated for uploading to the cloud, even if they meet all other person criteria.

- Companies must have an address in order to be uploaded to the cloud, so if you enter this Company Address Criteria:

Address_Type = 'Shipping address'

companies who do not have a shipping address are not uploaded, and consequently their associated contacts are not uploaded.

Enter Address Book criteria

- For the Additional Criteria area, enter criteria to filter companies and contacts.

SAGE ODBC QUERY - ADDITIONAL CRITERIA (OPTIONAL)	
Companies Criteria	AND (ABM_MASTER_COMPANY.Date_Stamp > CURDATE()-4)
Company Address Criteria	AND Address_Type = 'Shipping address'
Company Contacts Criteria	AND Email_Address <> NULL OR Business_Fax <> NULL
Person Address Criteria	AND State = 'WA' x

Save

- Click Save.
- At the top of the window, click Request Synchronization to begin synchronizing your Address Book, standard cost code, and standard category lists.

Sage 300 Connector Connector Sync History

The Sage Connector allows this Organizations contact records to be synchronized with your Sage 300 database

☒ Synchronize this Organization

Request Synchronization

API Key

[Download Sage 300 Connector \(v15.x\)](#)

[Download Sage 300 Connector \(v16.x\)](#)

SAGE CPC USER NAME AND PASSWORD	
User Name:	<input type="text"/>
Password:	<input type="password"/>

SAGE 300 ON PREMISE USER NAME AND PASSWORD	
User Name:	<input type="text" value="SCPC"/>
Password:	<input type="password"/>