User Manual
Web DataLink for Sage Line 50

Version 1.0.1

Connecting Ecommerce and ERP

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About this manual

This guide will explain how to connect your copy of Sage Line 50 with Web DataLink for Sage. This will enable the transfer of products from Sage to your website, and the transfer of downloaded order information from website to Sage. This guide assumes you are already familiar with Sage Line 50.

Compatibility: Web DataLink for Sage will work with the Sage Line 50 software. Web DataLink for Sage supports transfer of Stock, Orders, and Customer transactions.

Customer support

DataLink provides telephone and email support from Monday to Friday, 9am to 5pm UK Standard Time (GMT) (excluding UK Public&Bank Holidays). For UK customers, please call DataLink on 0800 011 2569.

Please note that on calling DataLink a member of our customer support team will always ask if you have sent us a copy of your Log file, so send an email to info@datalinkuk.com and attach a copy of the Log file and your support enquiry.

It is advisable that you do this before you call. We will then investigate your support call and let you know the solution or refer it to our Development team. In most cases extended time to amend an issue is less than 6 hours as it is quite involved to check log files and make sure all is setup correctly.

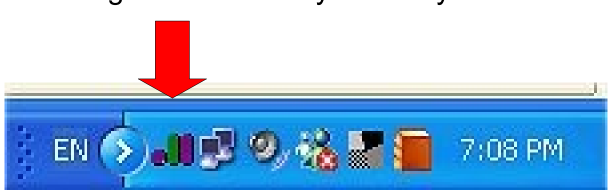
Purpose of the software

Web DataLink for Sage Line 50 can be used to synchronise a Magento-based online store with your Sage Line 50 software.

This includes:

- Orders and customers accounts download from Magento to Sage Line 50
- Products download from Magento to Sage Line 50
- Products upload from Sage Line 50 to Magento

While running, Web DataLink for Sage "sits" in the system tray as an icon.



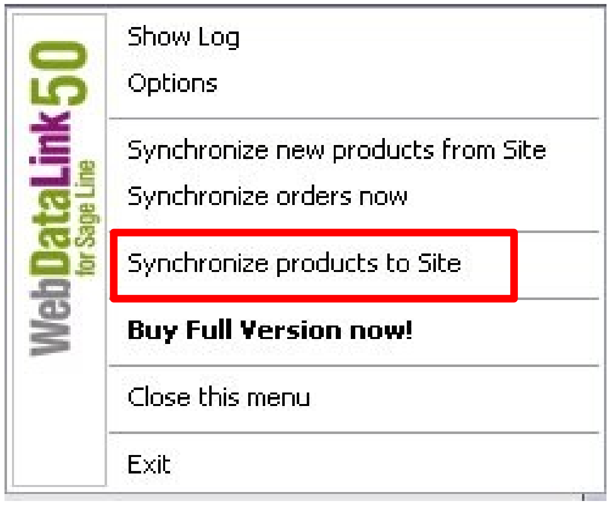
Right mouse clicking on the icon displays a pop-up menu containing the following items:

- **Synchronize orders now** downloads orders from Magento to Sage Line 50.

- **Synchronize new products from Site** downloads products from Magento to Sage Line 50.

(This feature is useful for systems that have newly installed the Sage Line 50 software with an empty product database. If you already have your product catalogue online, you can download it into Sage Line 50 and at a later date, if you wish to upgrade your software, you can then upload and manage your online catalogue through Sage Line 50.)

- **Synchronize products to Site** uploads products from Sage to Magento.



- **Show Log** opens Log Explorer window demonstrating information about Web DataLink's activity.

- **Options** opens the **Web DataLink Options** window.

Installation

Web DataLink for Sage Line 50 consists of two parts. The web part is pre installed to the Magento website by DataLink UK team. Please note Web DataLink for Sage must be installed onto the same computer as Sage Line 50.

Notes:
To install a web part of Web DataLink for Sage, a user should have the following information: Web Services User Name and IPI Key, plus the full rights to manage all the data that is supposed to be synchronized.

If the user is not provided with access to website Admin Panel for some reasons, then it should be provided with details described above.

The software itself is installed as any other MS Windows based software onto your PC, following the instructions of a specially designed Installation Wizard.

These procedures apply when the Web DataLink software is delivered to the Customer via email or via a web download with a Web DataLink's ZIP file as an attachment and by using the popular WinZip software, or when the installation is delivered as an executable file.

Contained in the installation are the following documents and files:

– Setup.exe (install file for Web DataLink for Sage Line 50)
– License Agreement
– Detailed installation Manual
– Readme File

Now unzip your program and install it to your PC:

(a) Firstly, save the ZIP file to your computer by either right clicking on the ZIP file attachment in the email or clicking on the website URL given to you in the email, and then click “SAVE AS”. Save the file to “MY DOCUMENTS”.

(b) Open “MY DOCUMENTS” in the computer Desktop, and then locate the Web DataLink ZIP File. Right click on the ZIP file, and then on GO TO “Extract DataLink …”, and then click on “EXTRACT TO”. Double click on the folder that you have unzipped and double click on the “setup.exe” file. This will launch the “SET UP Wizard”.

(c) Follow the instructions in the “SET UP WIZARD” and accept the “Web DataLink License Agreement”.

Create the Desktop icon:

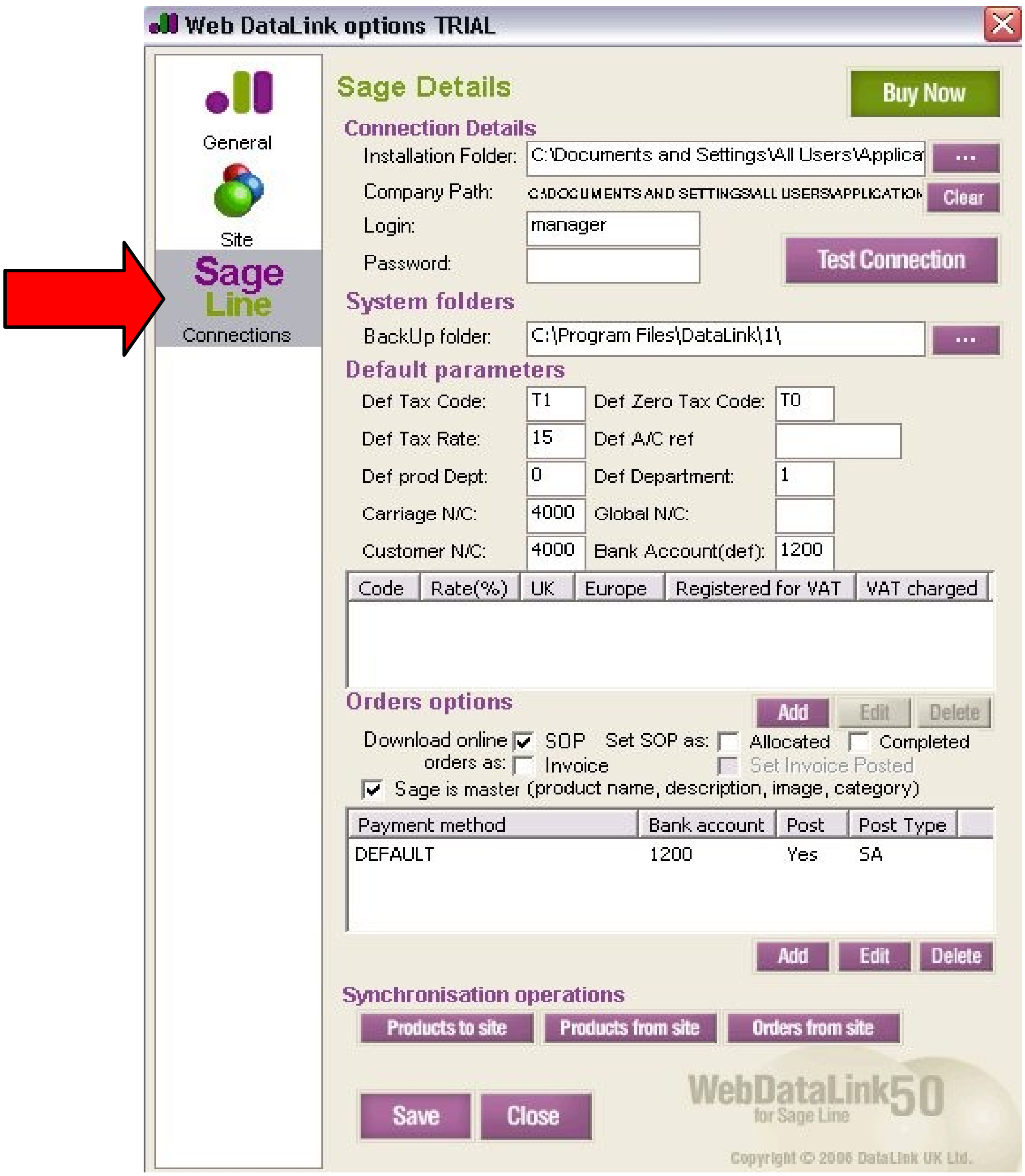
and the Quick Launch icon:

You will then be able to commence using the software by clicking the Web DataLink icon in the system tray or the icon on the computer Desktop.

Settings and Configuration

Sage Details

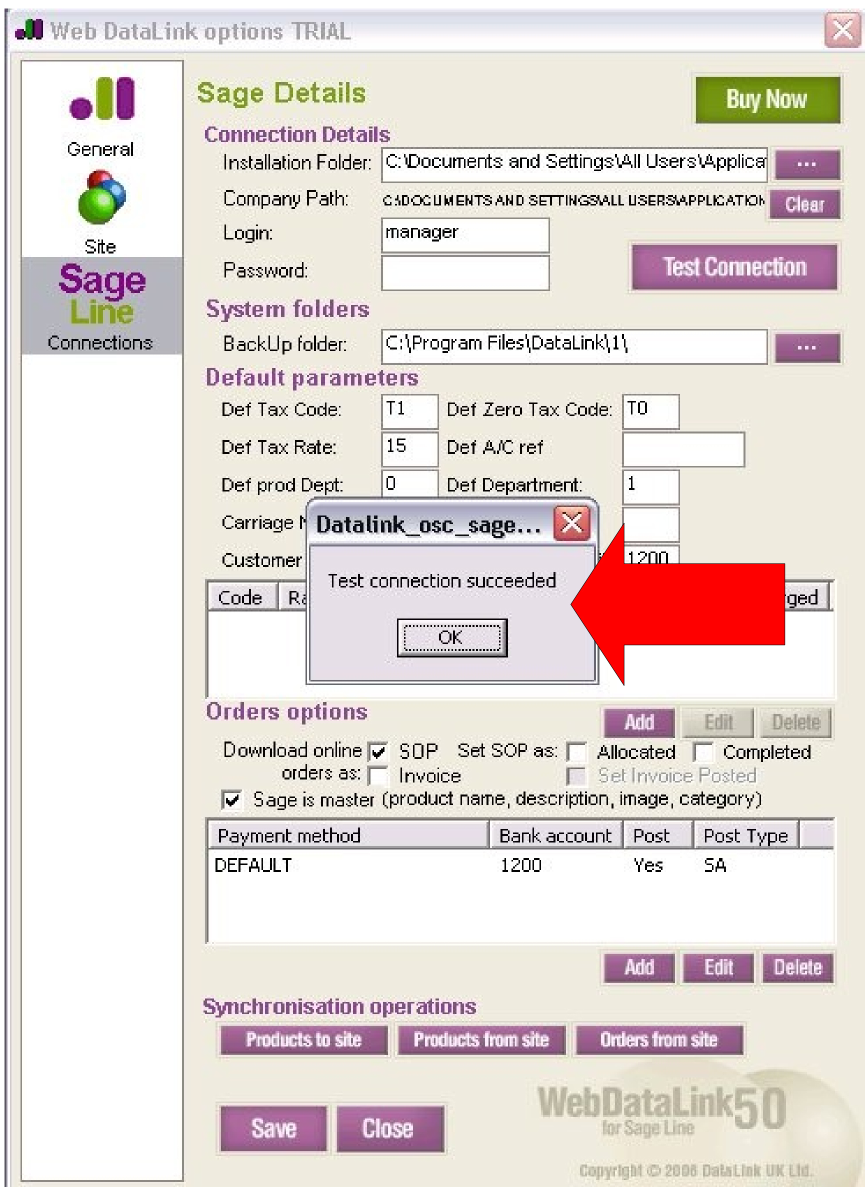
1. Click the **Sage Line Connections** tab to the left to switch to the **Sage Details** page.



5. Under **System Folders** show a path to the backup folder. The software uses this folder to store temporary files. Click the “*browse*” button opposite the **BackUp folder** field and select a proper directory, for example, C:\Program Files\DataLink\1\.

6. Click the **Test Connection** button in order to confirm the system can connect to the database, and also the “3d Party Integration” has been activated and is working properly on your local PC.

If everything is OK, the Web DataLink will show the “Test connection succeeded” message.



If Connection Fails

I. If connection fails you need to check/create User Access Rights within the Sage Line 50.

(a) Go to Sage Line 50.

(b) Press the **Alt-I**, and **A** hotkeys. Or, open **Settings** > **Access Rights** in the upper menu.

(c) Answer "Yes" in the message box appeared on the screen.

(d) If there is no user in the list, click the **New** button to create a new user and enter the name in the **Logon Name** field. You may leave the **Password** field empty if you do not want to protect the access by password.

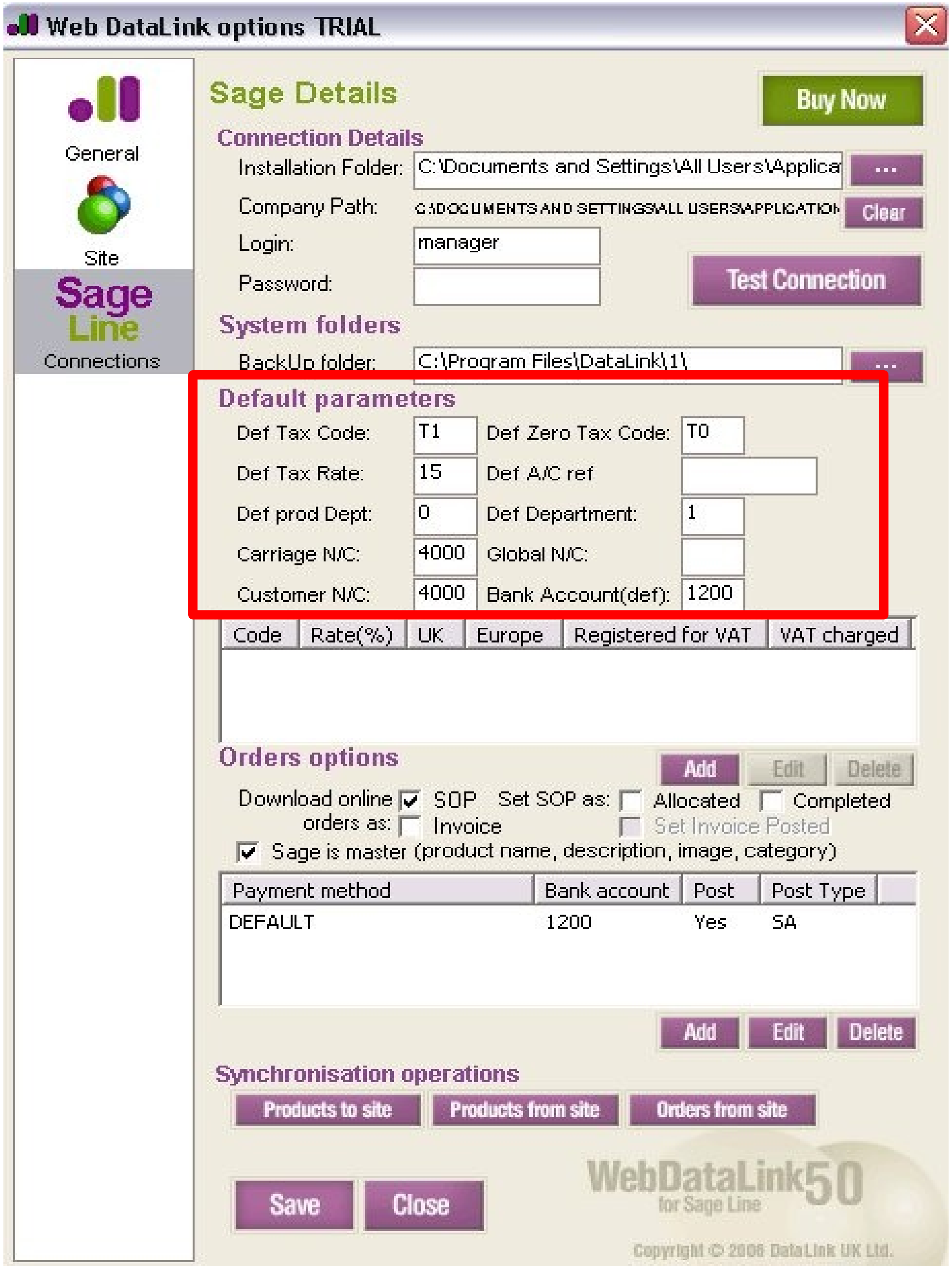
(e) Click the **Save** button and close the **Create New User** window by clicking the **Close** button.

(f) Then, close the **User Access Rights** window by clicking the **Close** button and return to the Web DataLink for Sage dialog.

(g) In the **Sage Details** page enter a username in the **Login** field and click the **Test Connection** button again.

(h) Click the **OK** button in the **"*Test connection succeeded*"** message box.

Return to the *Web DataLink PRO for Sage options* window. Under **Default parameters**, there are fields containing default parameters of the orders:

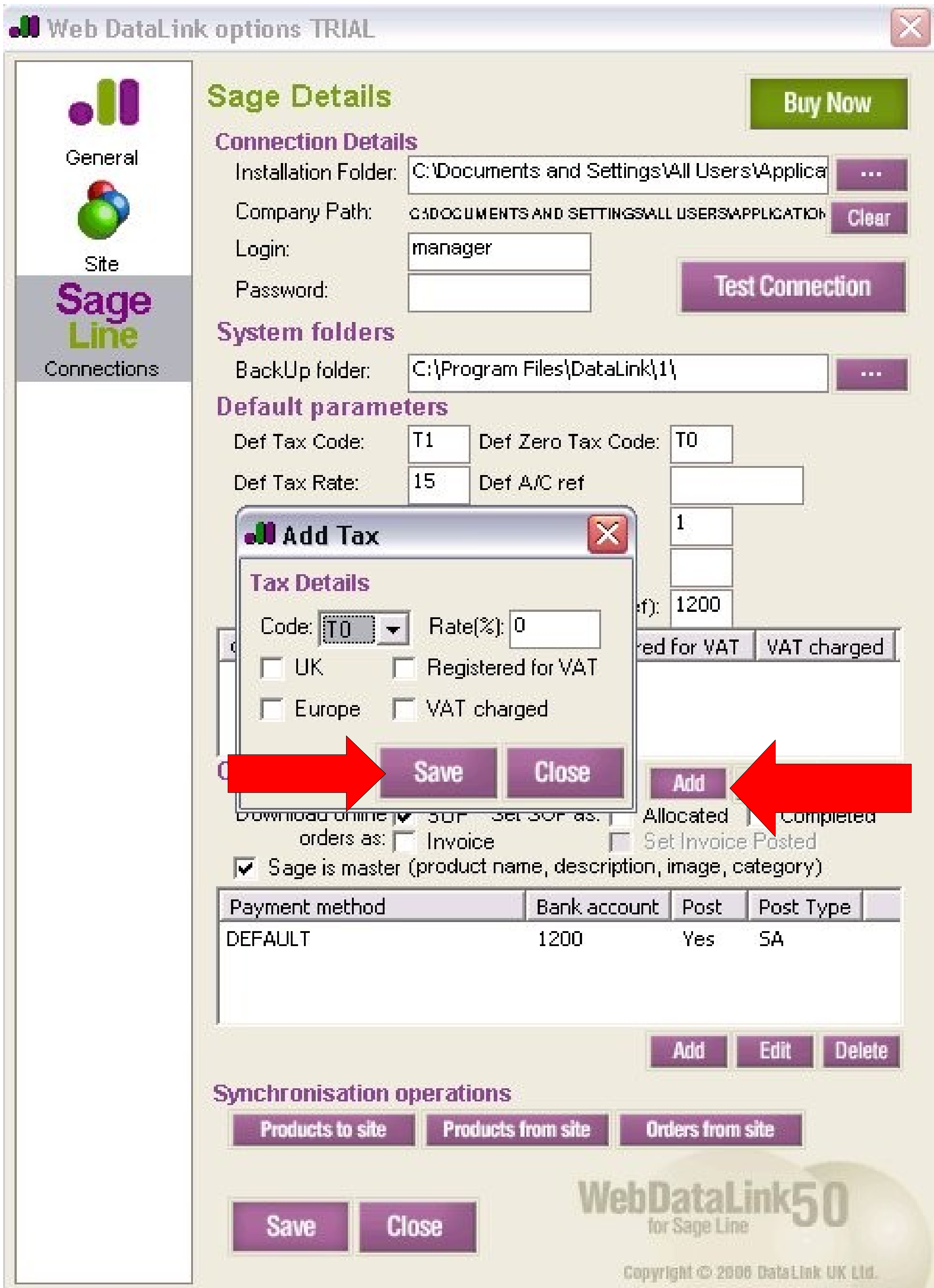


- **Def Tax Code** field is used to set the default tax code for online orders. Default value is T1.
- **Def Tax Rate** field is used to set the default tax rate. Default value is 17.5%
- **Def Zero Tax Code** field is used to set the default zero tax code. Default value is T0.
- **Def A/C ref** field is used to set one and the same customer's account number for all online orders.
- **Def prod Dept** field is used to set department number. If you are using the departmental analysis facility, you can assign products to a department for reporting purposes.
- **Def Department** field is used to set a department's number in order to assign carriage fees to it.
- **Carriage N/C** field is used to set a specific nominal code for carriage fees.
- **Global N/C** field is used to set a nominal code in order to assign the entire net value of the invoice to just one nominal account specified in this field.

Note: *If you import orders as INVOICES, this field should be filled in. Default value is 4000.*

- **Customer N/C** field is used to set a specific nominal code for customers.
- **Bank Account(def)** field is used to set the nominal code of bank account for online orders to be associated with.

It is possible to add some additional tax codes for any special purposes. To do this, press the ***Add*** *button and select* code name, specify rate (%), and tick the appropriate checkboxes. Then, click the **Save** button.

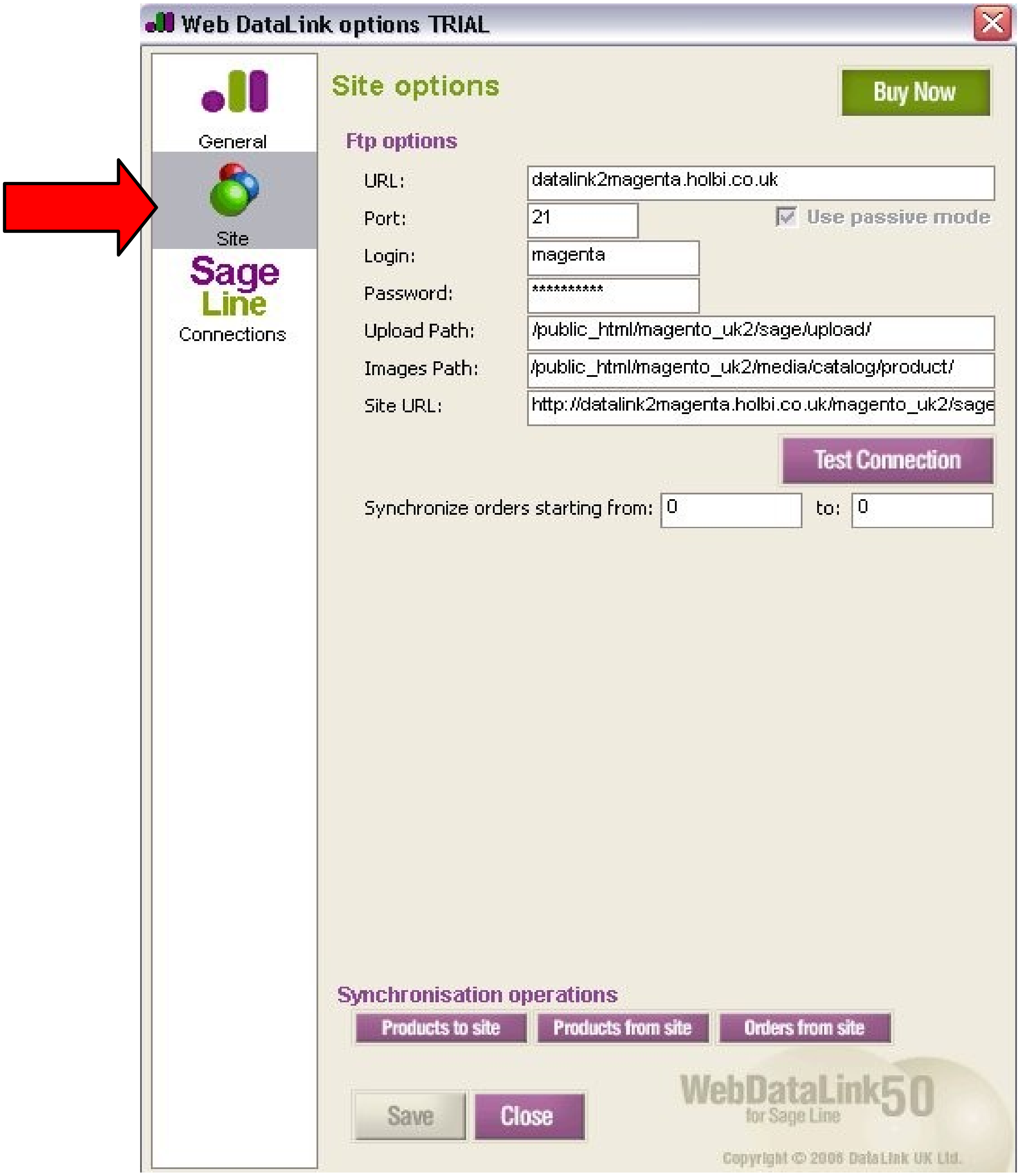


Site Options

Web DataLink for Sage Line 50 needs to be configured only once. It stores configuration settings in the MS Windows registry of the local PC.

1. For successful work Web DataLink for Sage requires access to your website. Go to **Site Options** window: right mouse click on the icon in system tray and select **Options** item.

2. Click the **Site** tab to the left.



The image above demonstrates test data in the fields. Actually, the fields are pre-filled with the default links and settings already, so you only need to press the **Test Connection** button to make sure the local PC actually can connect to the Magento installation.

Due to the license restrictions only FTP username and password can be changed, but not the URL and host.

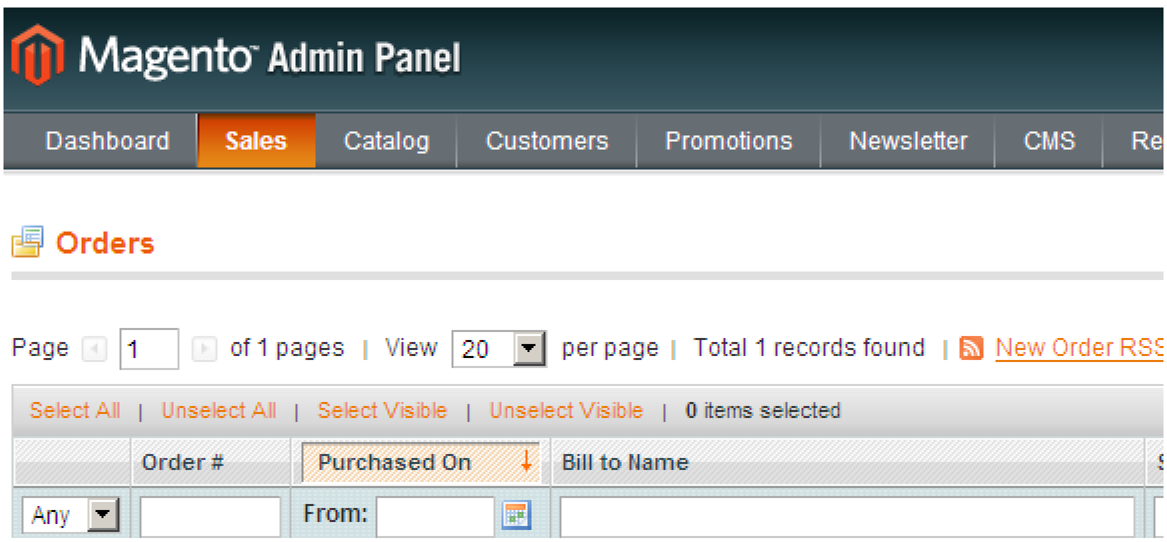
(Please note that all standard installations of the program are hardcoded with your FTP details to ensure that if you connect every time. If you have requested that we leave your username and password fields so that you can change these as you update your FTP login details, please make sure that if you change your FTP you also change options in Web DataLink for Sage.)

3. The **Synchronize orders from** option allows for a specific order ID on the site. If you don't want to synchronize all online orders, you can set an Order ID in this field, so only orders with greater IDs will be synchronized.

<u>Example:</u>

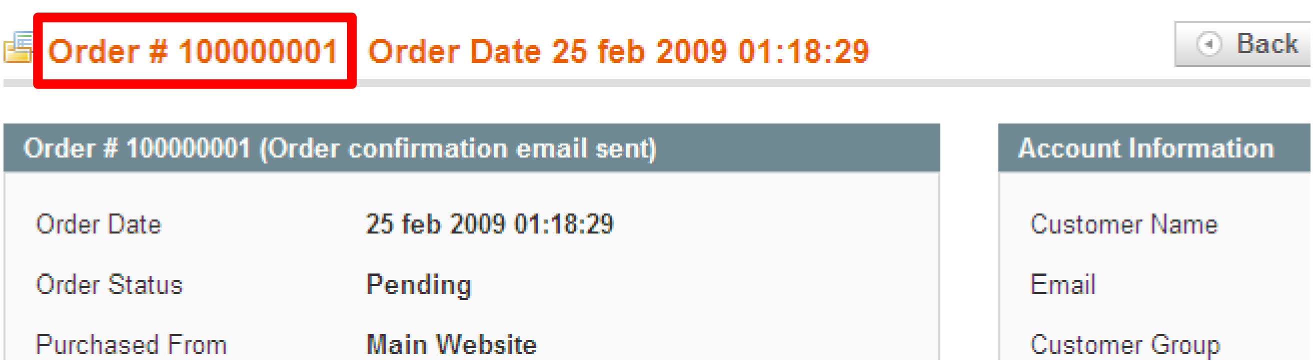
a) Open Administrative Panel of the Magento web-store.

b) Search for the **Orders** on site (go to Sales > Orders).



c) In the Orders list, choose a record.

d) Find an **Order #** and copy it. For example, the order # is 100000001.



a) Then, go to **Web DataLink for Sage** > **Site Options** window.

b) In the **Synchronize orders starting from** field, paste the order's ID. All the new orders with IDs greater than set in this field will be downloaded to Sage.

If you want to synchronize a certain range of orders (for example, from ID=100000001 to ID=100000005), specify the appropriate orders IDs in the “Synchronize orders starting from” and “to” fields.

4. Fill the **Login** and **Password** fields in: specify login name and password provided to you by Web DataLink developers. This will protect the scripts necessary for Sage's proper work from using these by other people.

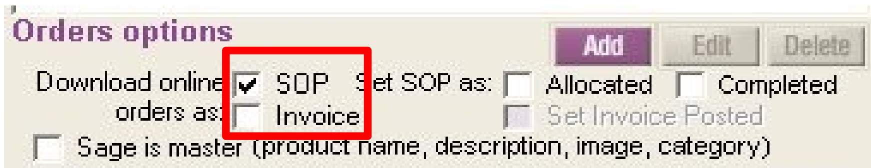
After you have finished with settings on this screen, please click the **Test Connection** button to check connection to your site.

Then, click the **OK** button on all the message dialogs appearing on the screen.

Orders options

Online orders can be downloaded into Sage Line 50 as Invoices and/or Sales Orders.

- Select the **Invoice** checkbox if you wish to add orders as Invoices.
- Select the **SOP** checkbox if you wish to add orders as Sales Orders.



Note: Only sales orders, but not invoices can be created in Sage should there be not enough products in stock.

Also, Sales Order can be automatically set into the “Completed” or “Allocated” status if the **Set SOP as:** [ ] **Completed** (or Allocated) checkbox is selected;
The Invoice can be automatically set into the “Posted” status if the **Set Invoice Posted** checkbox is selected.

Note: The Set Invoice Posted checkbox becomes available after the Completed checkbox has been selected.

Please pay special attention to the **Sage is master** checkbox. With this option checked the Product Name, Description, Image and Category fields will remain unchanged in the Sage Line 50 after synchronization even if changed on the website.

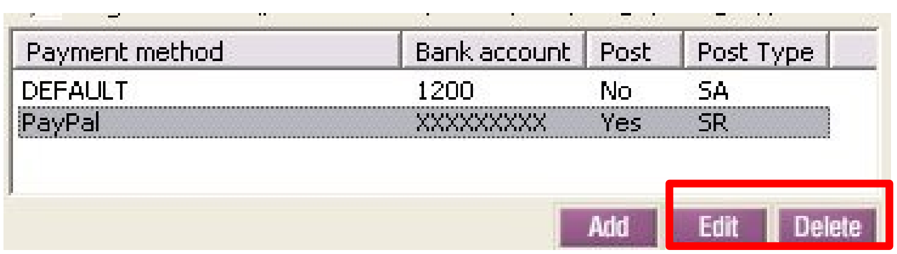
With this option unchecked it works vice versa - the product data remains unchanged on the website even if changed in the Sage Line 50.

Note: A stock level is always taken from the Sage Line 50. It make sense to disable stock subtraction feature on the website.

You can also add Payment methods here using the **Add** button below the grid.

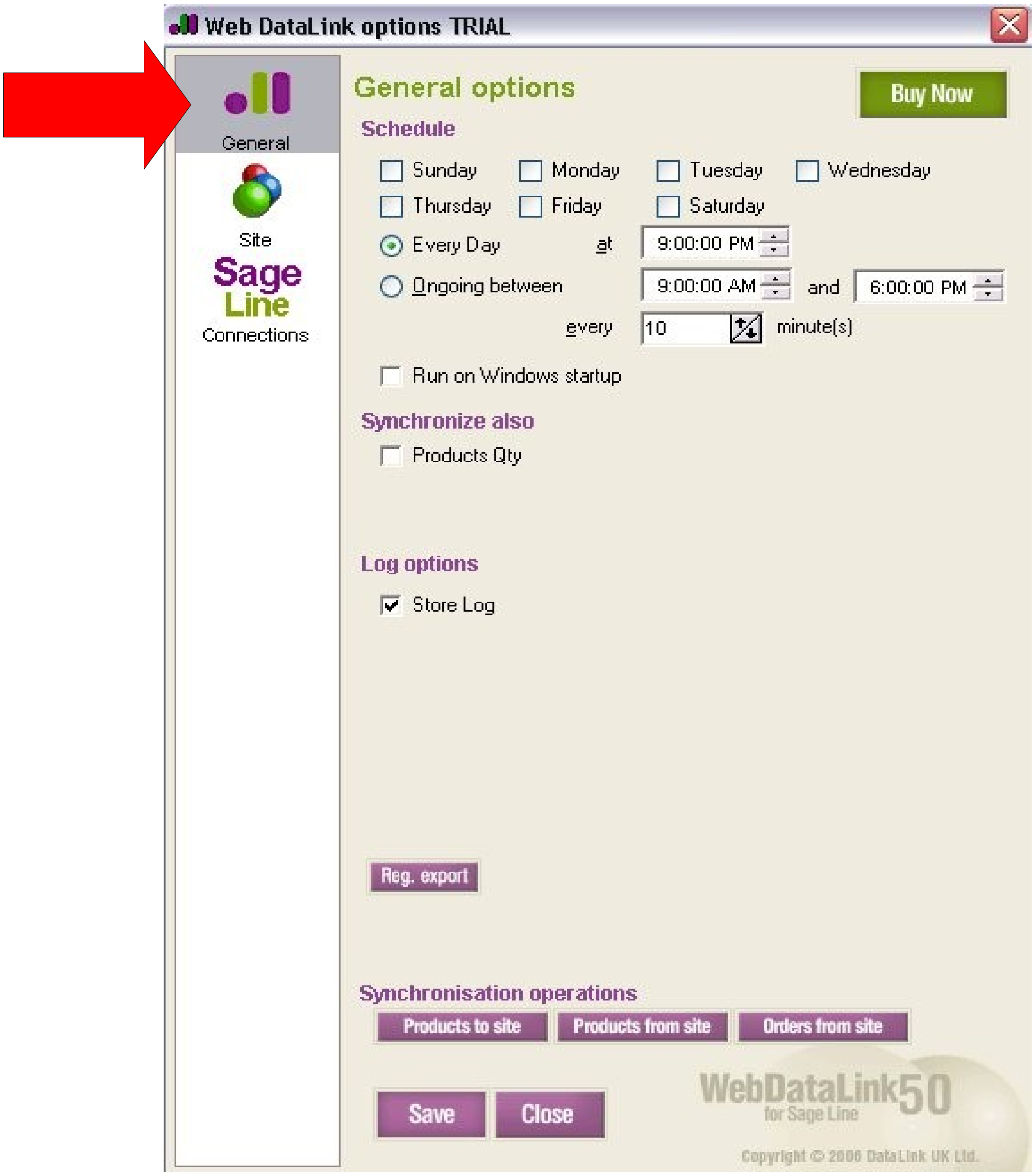
Fill all the necessary fields out with the appropriate information and choose the correct payment ("on Account" or "to Invoice"), and then click the **Save** button.

Note: Use the appropriate buttons to ***Edit/Delete*** *payment method.*



General Options

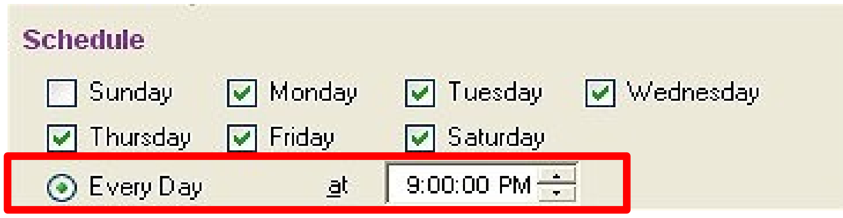
Click the **General** tab on the left to open the **General options** page.



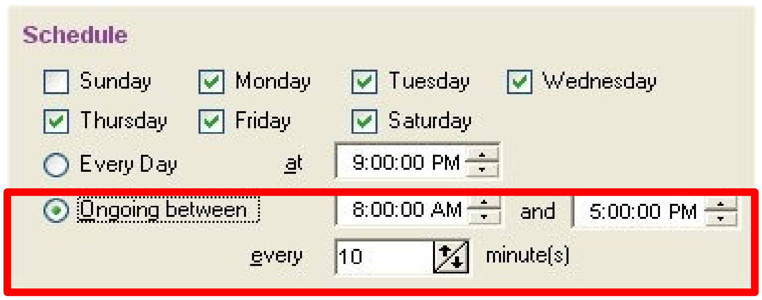
The **General Options** page contains options making the Web DataLink for Sage easier for you to run.

1. To synchronize your data once a week, you should choose any one day. If you want to do this every day, you should tick all days of the week. To disable automatic synchronization, simply untick all days options.

2. You can set the time for Web DataLink for Sage to run. If you want it to run once a day, you can tick the **Every day** option, and then set a time, for example, 9:00:00 PM.



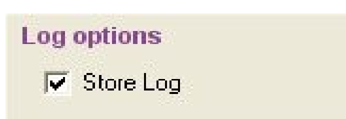
3. Also, you can synchronize your data several times a day. In this case you should tick the **Ongoing between** option, and then set a time range, for example, 8:00:00 AM and 5:00:00 PM, and then set an interval, for example, every 10 minutes. So, with such settings the Web DataLink for Sage will synchronize data every 10 minutes between 8:00:00 AM and 5:00:00 PM on the selected days of the week.



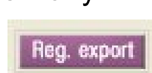
4. In this section there is **Run on Windows startup** option. If this option is ticked, the Web DataLink for Sage will run on Windows startup. Please note in this case it doesn't mean the synchronization process will be started immediately. It will start on time according to the Scheduler options described above.

5. If you wish to synchronize Product's Quantity, please tick the **Products Qty** checkbox under the '**Synchronize also**'.

6. We strongly recommend you to tick the **Store Log** checkbox. It means detailed information about all the Web DataLink's activities will be stored in the log file. It will help us solve the problems with its work if any will take place.



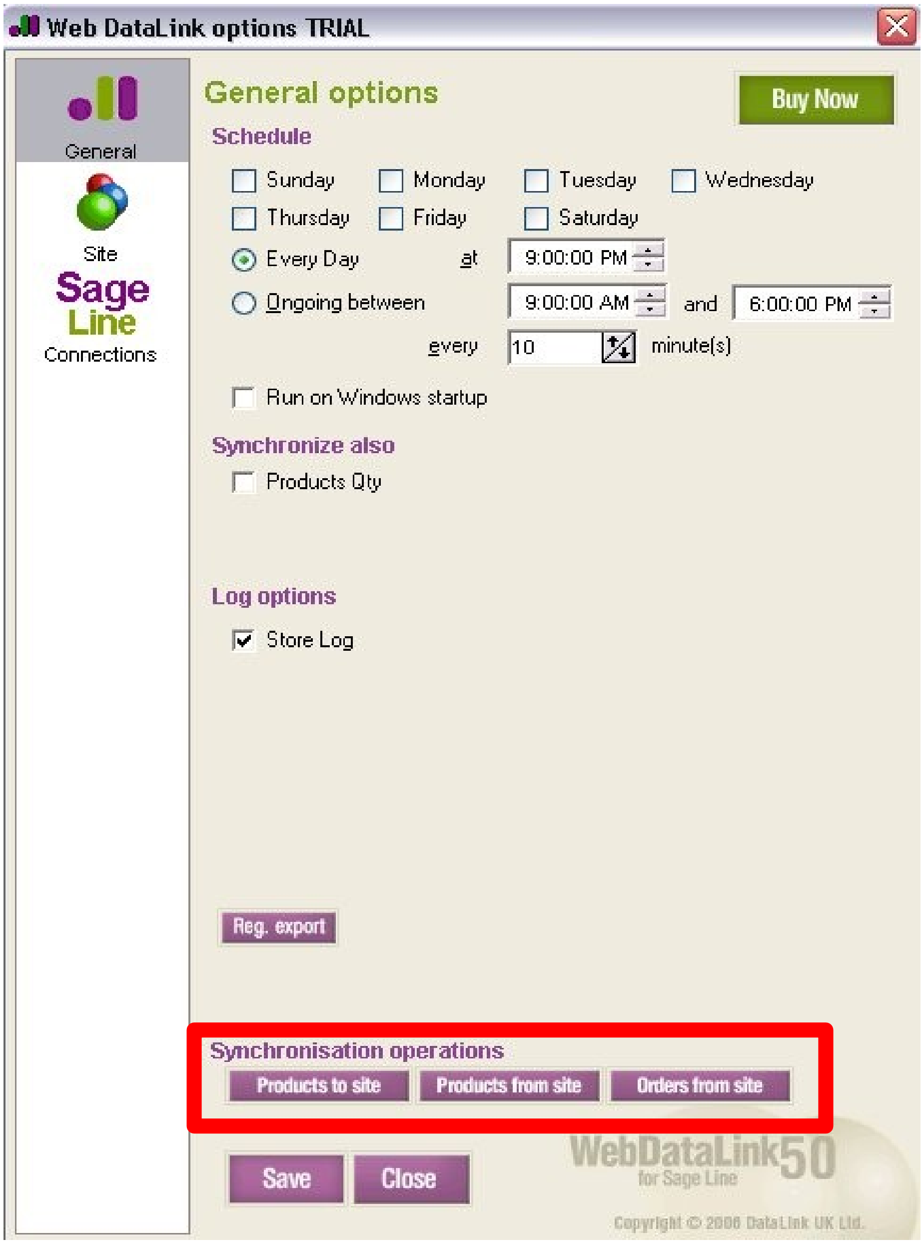
6. The **Reg. export** button allows for creating a file which contains information about current Web DataLink's settings. This file can be sent to the Web DataLink for Sage Line 50 developers in order to help them solve the problems if any will take place.



To create a ***.cop** file, click the **Reg. export** button and save the file to your PC.

Synchronization operations

After setting the Options up, you may start synchronization operations using buttons at the bottom of the **Web DataLink for Sage options** window.



- Click the **Products to site** button if you wish to upload products from Sage Line 50 to Magento.
- Click the **Products from site** button if you wish to download products from Magento to Sage Line 50.
- Click the **Orders from site** button if you wish to download orders from Magento to Sage Line 50.

The Web DataLink for Sage Line 50 updates product price, description, model, stock, pictures, and categories. Also, it creates customer accounts and sales orders in the Sage Line 50.

Now let's view some examples of products/orders downloading:

Downloading Products

1. Click the **Products from site** button at the bottom of the Web DataLink for Sage window.

2. The downloading process will take for a few seconds, please wait. Then, right mouse click on the Web DataLink icon in system tray and select the **Show Log** item.

The **Log Explorer** window demonstrates detailed information about all the Web DataLink's actions. All records have "Type", "Result", "Date" and "Details" fields.

The "Type" field contains an operation type. The following types of operations can be displayed here:

- *Synchronization products from site*
- *Synchronization orders from site*
- *Synchronization products to site*

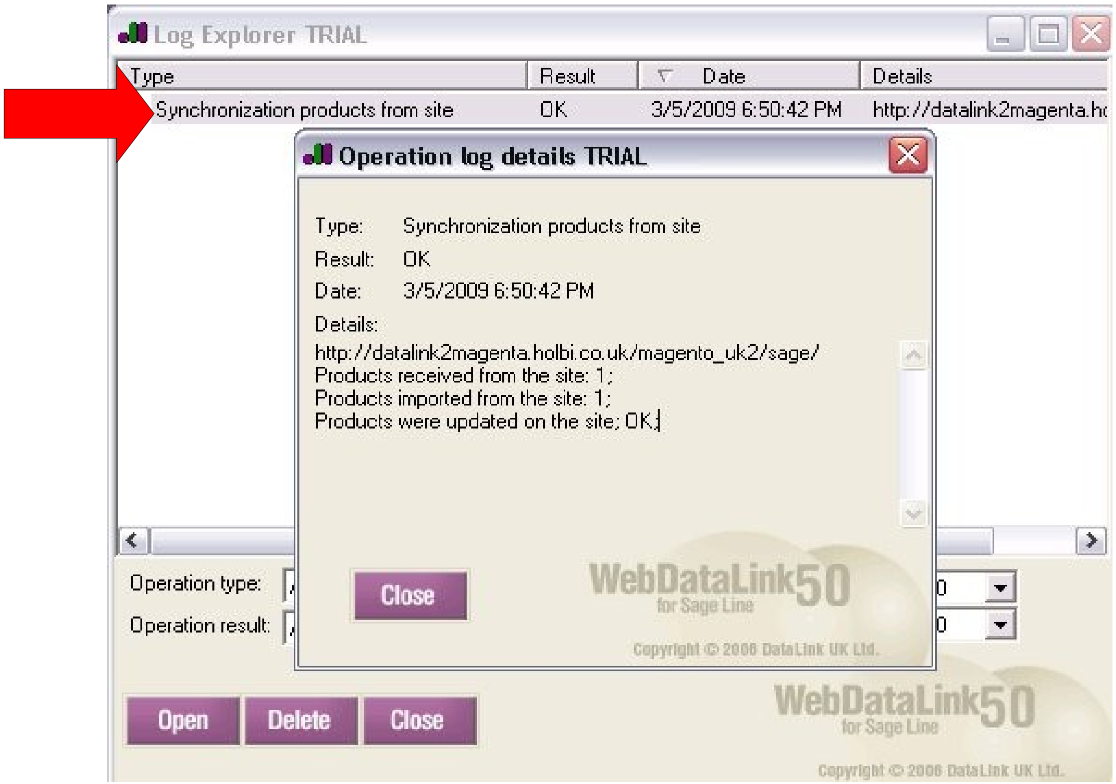
The "Result" field contains the operation results. It can display either ***Ok***, ***Error*** or ***Begin*** status.
The "Date" field contains operation date and time information.
The "Details" field contains additional data: how many products/orders were processed.

Note:

- ✔ You can filter the log by operation type, operation result, and date. If you click in the column's header, all data will be sorted in the alphabetical order.

- ✔ You can delete any log entry by using the **Delete** button at the bottom of the window.

3. For detailed information about the action you can select an item in the list and press the **Open** button. Or, double-click the “*Synchronization products from site*” item.

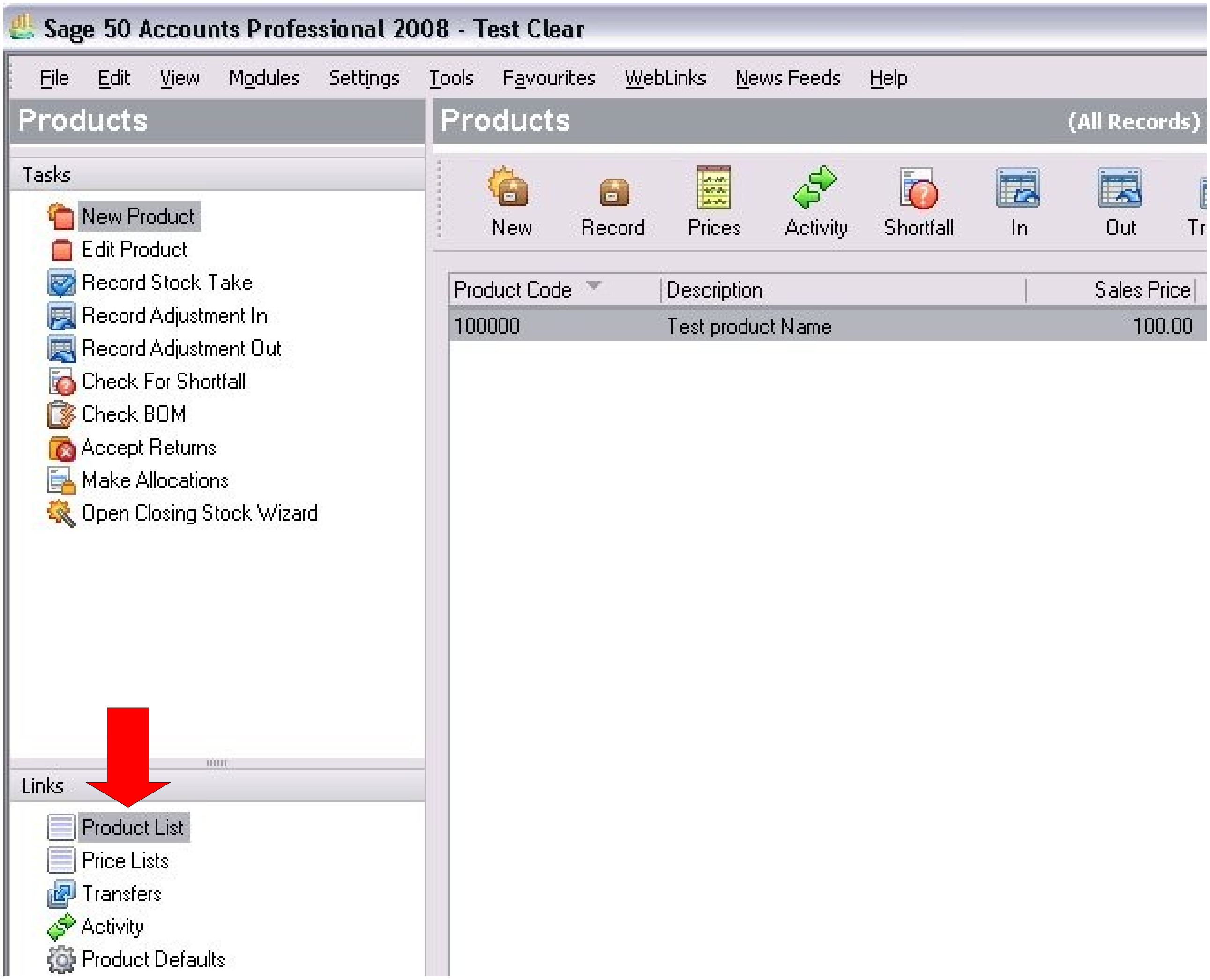


4. After reading information about Web DataLink's activity, close the **Log Explorer** window by clicking the **Close** button.

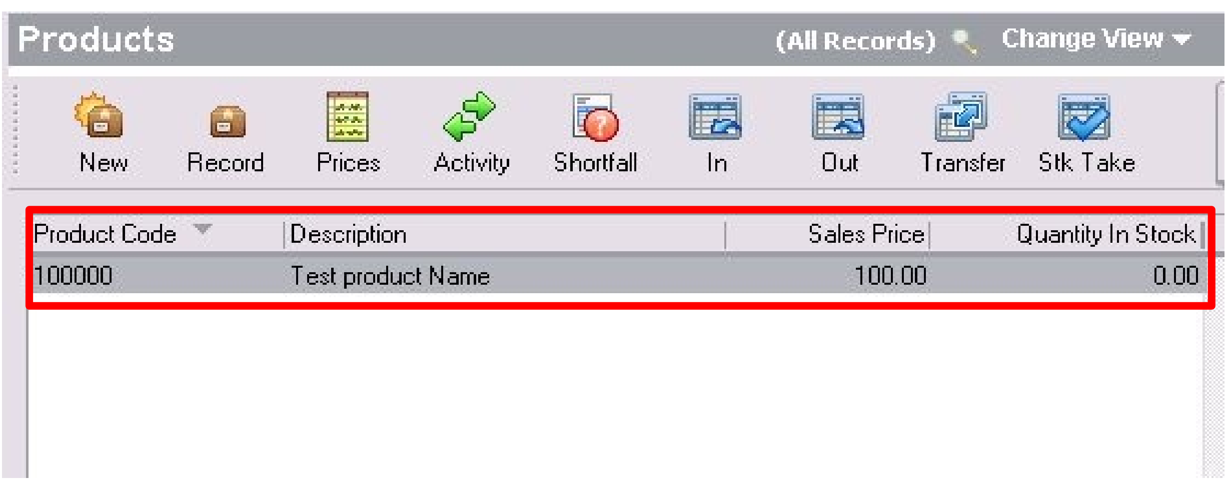
5. Then, go to the Sage Line 50.

4. In the left panel, under **'Links'** click the **Product List** item and view a list of new product(s) downloaded to Sage Line database.

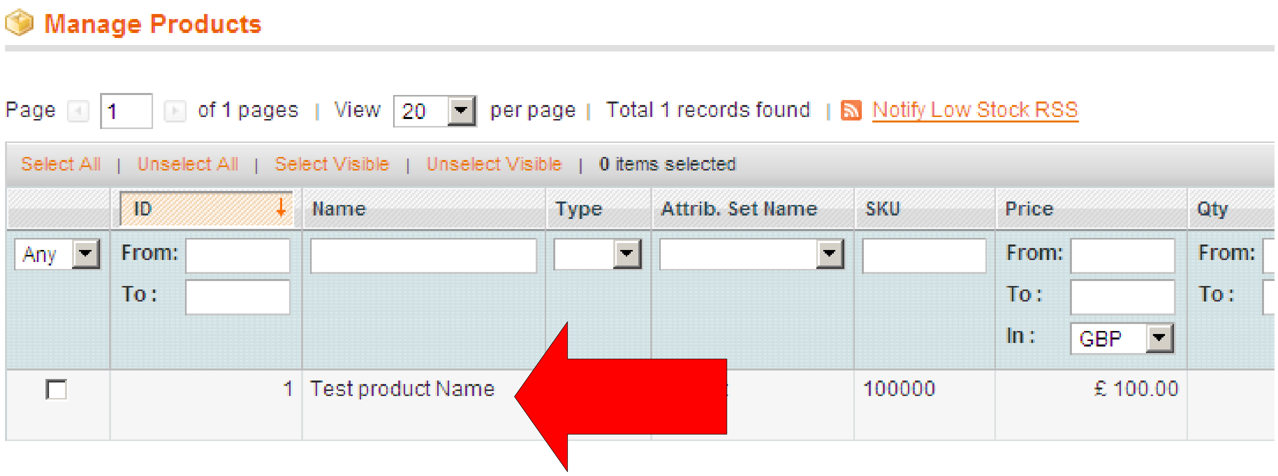
*Note: If the downloaded products don't show up in the list, please click the **Search** button at the bottom of the Sage window, and then click **Apply**.*



For example, there is one new product downloaded to Sage from site: **Test product Name**.



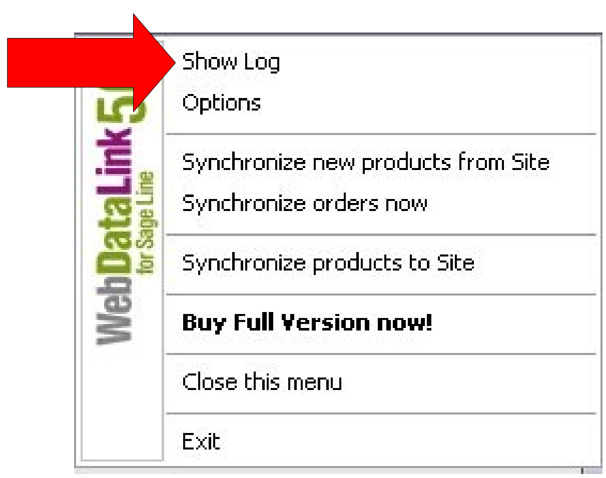
You can go to the website and view this product in the Catalog > Manage Products section to make sure the product was downloaded to Sage Line 50 properly.



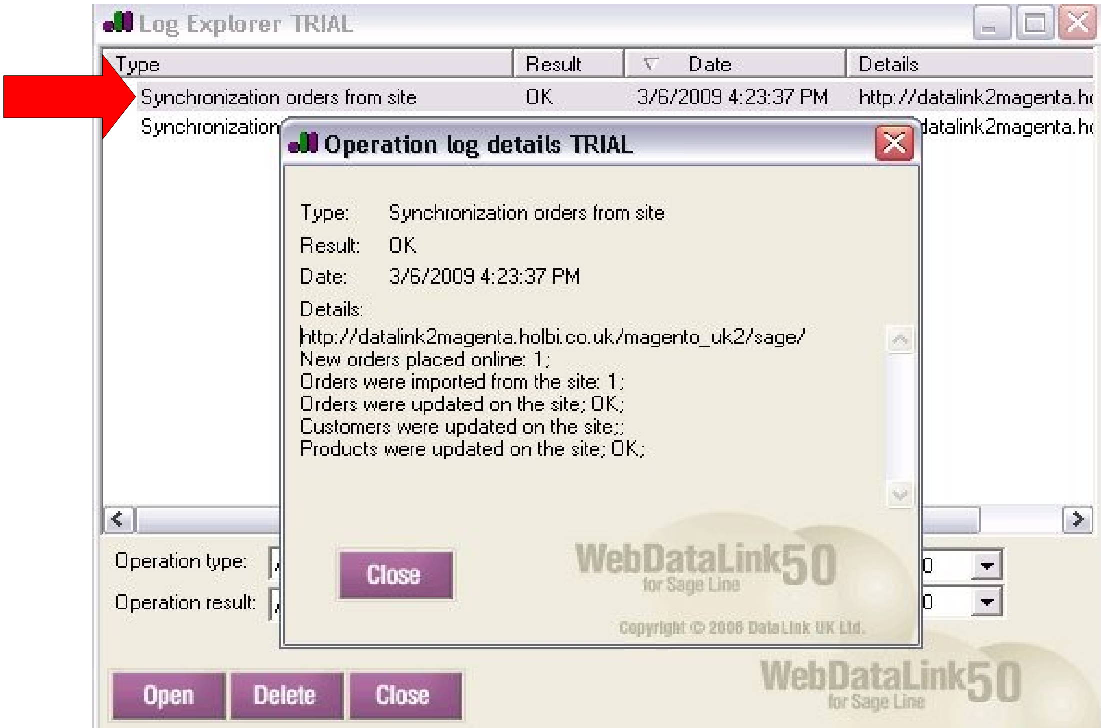
Downloading Orders

1. Click the **Orders from site** button at the bottom of the Web Datalink for Sage window.

2. The downloading process will take for a few seconds, please wait. Then, right mouse click on the Web DataLink icon in system tray and select the **Show Log** item.



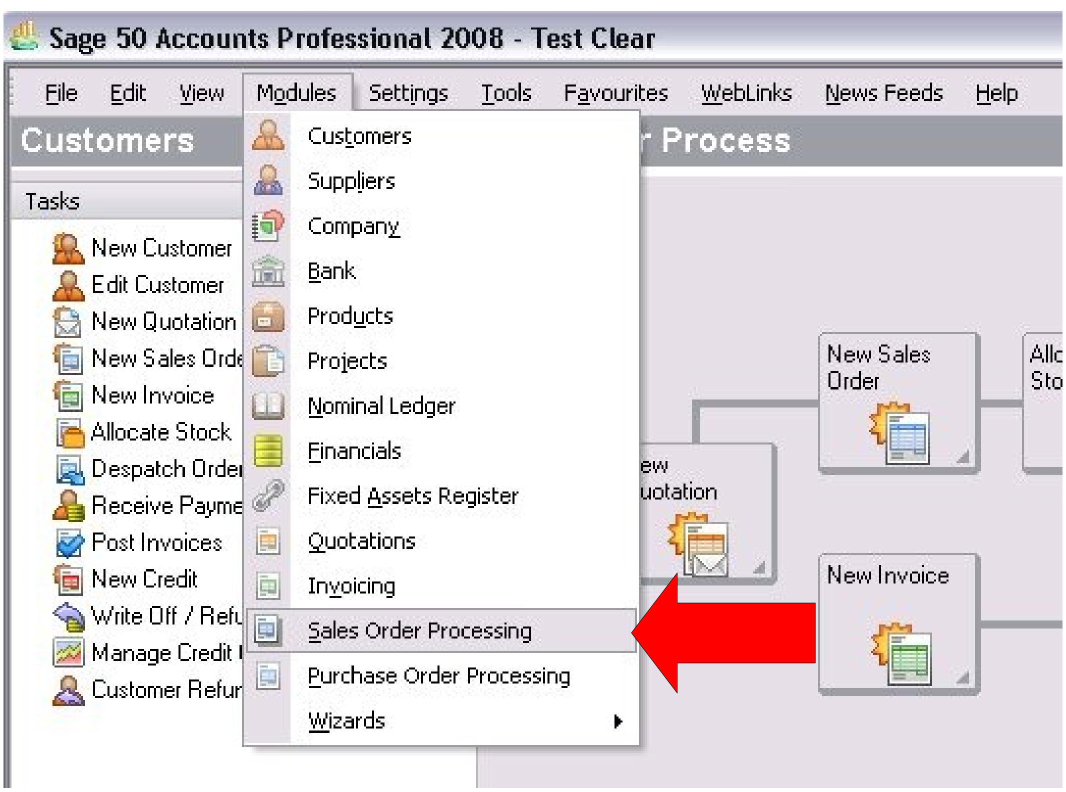
3. Double-click the "*Synchronization orders from site*" item in the grid to display the **Operation Log Details**. Or, select an item from the list and press the **Open** button.



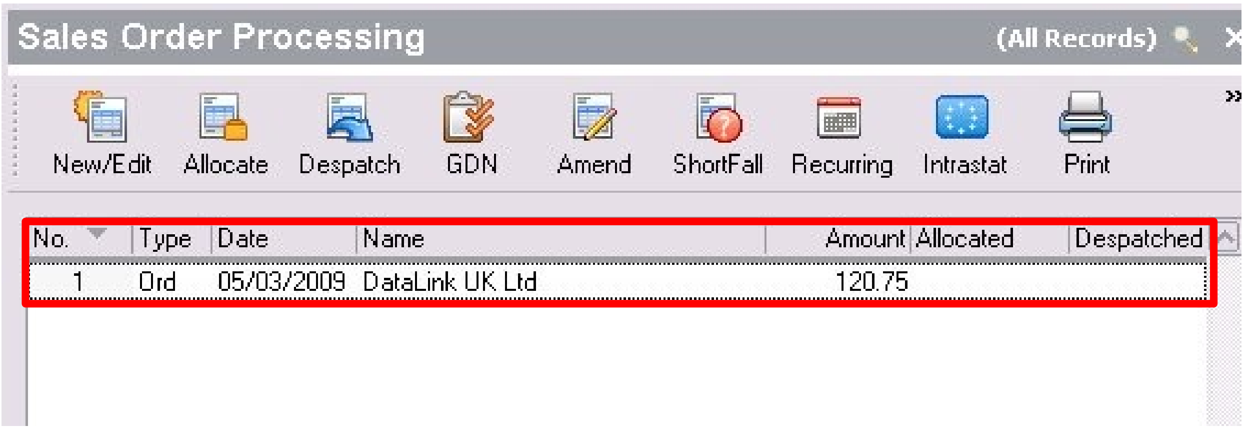
4. After viewing the information about Web DataLink's activity, close the **Log Explorer** window by clicking the **Close** button.

5. Then, go to the Sage Line 50.

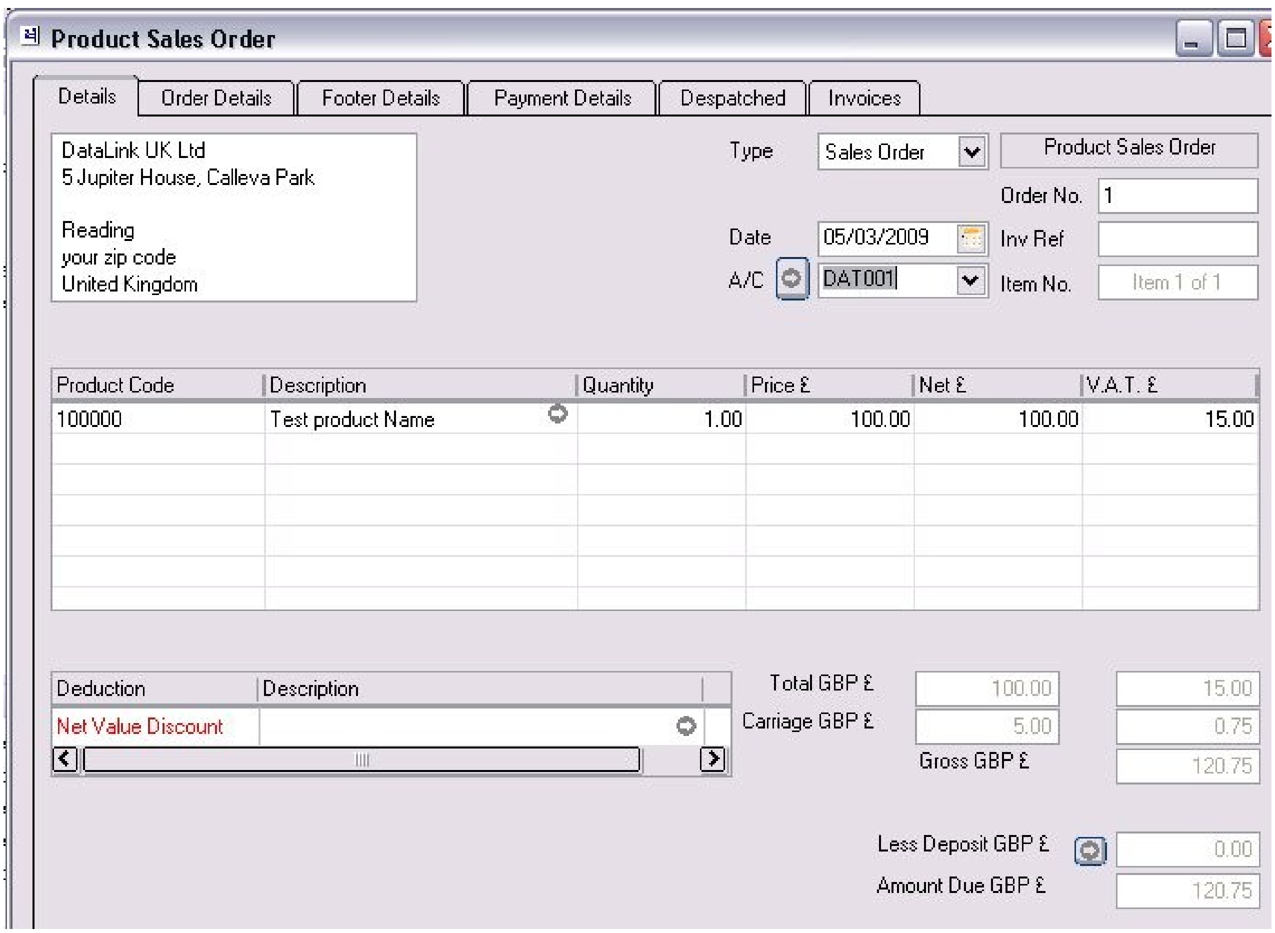
6. Press the **Alt-O**, and **S** hotkeys on your keyboard. Or, click **Modules**, and select the **Sales Order Processing** item in the upper menu.



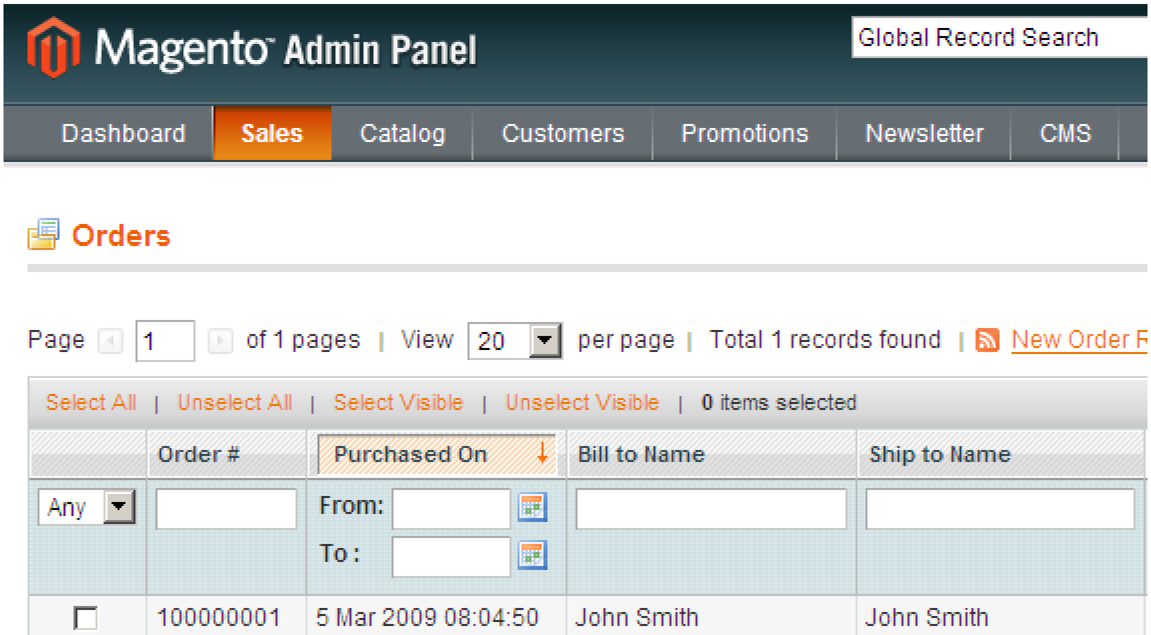
7. In the **Sales Order Processing** screen you can see the new order(s) downloaded to Sage from the website.



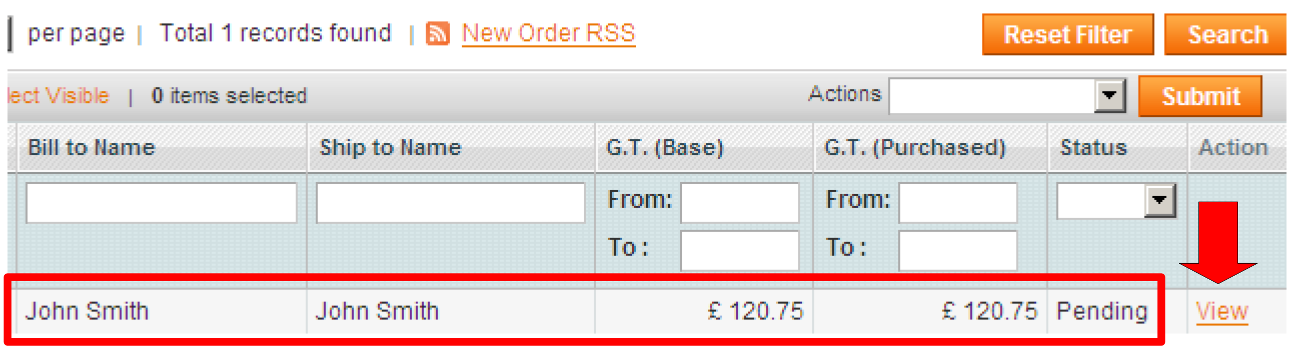
8. Double-click on the order's name in the grid to display its details.



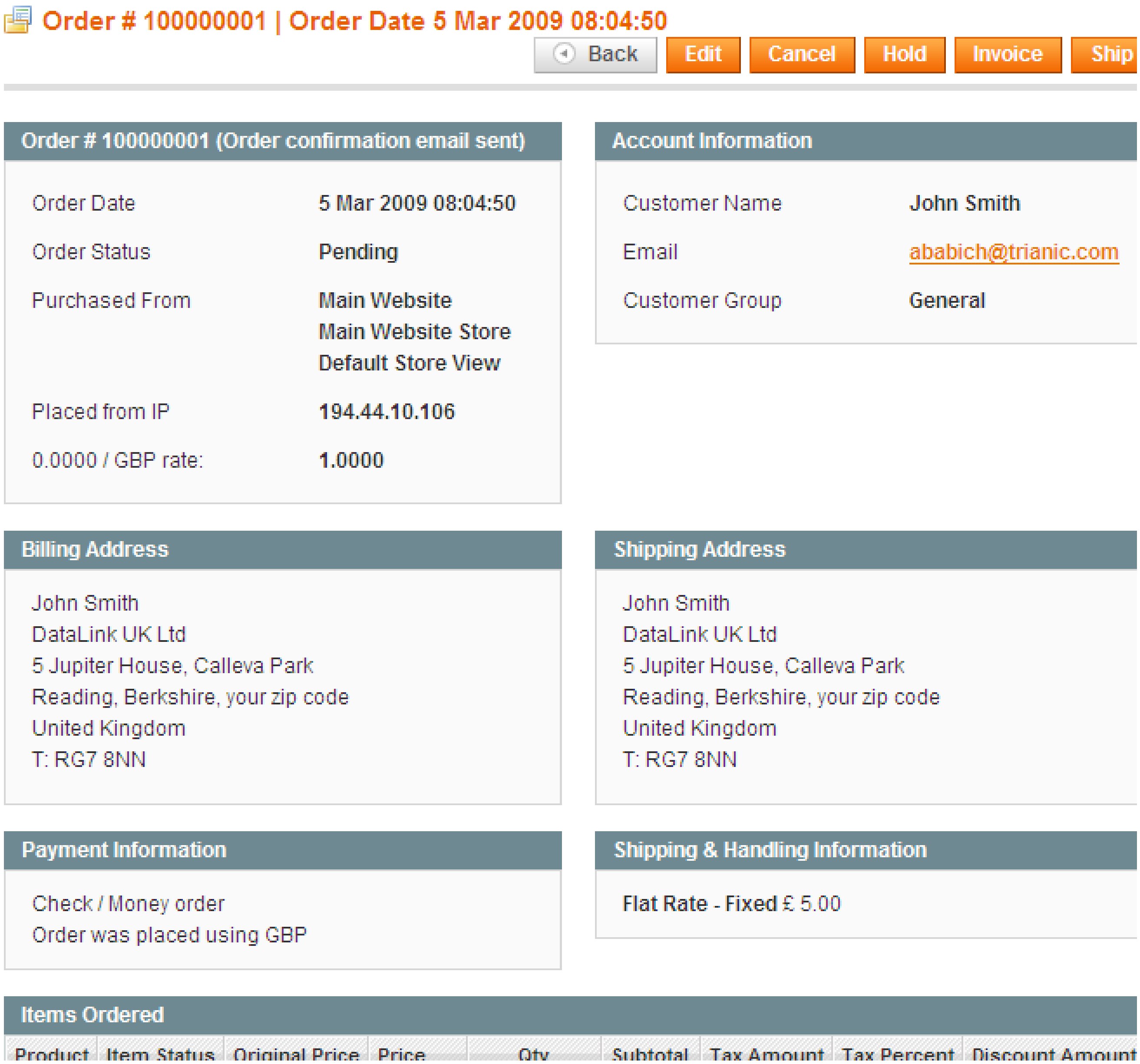
9. Then, go to the Magento site (Administrative part) > Sales > Orders section and view the order(s) to make sure the synchronisation process was done properly and all the orders details were downloaded to Sage Line 50.



10. Highlight an appropriate order in the list and click the **View** link.

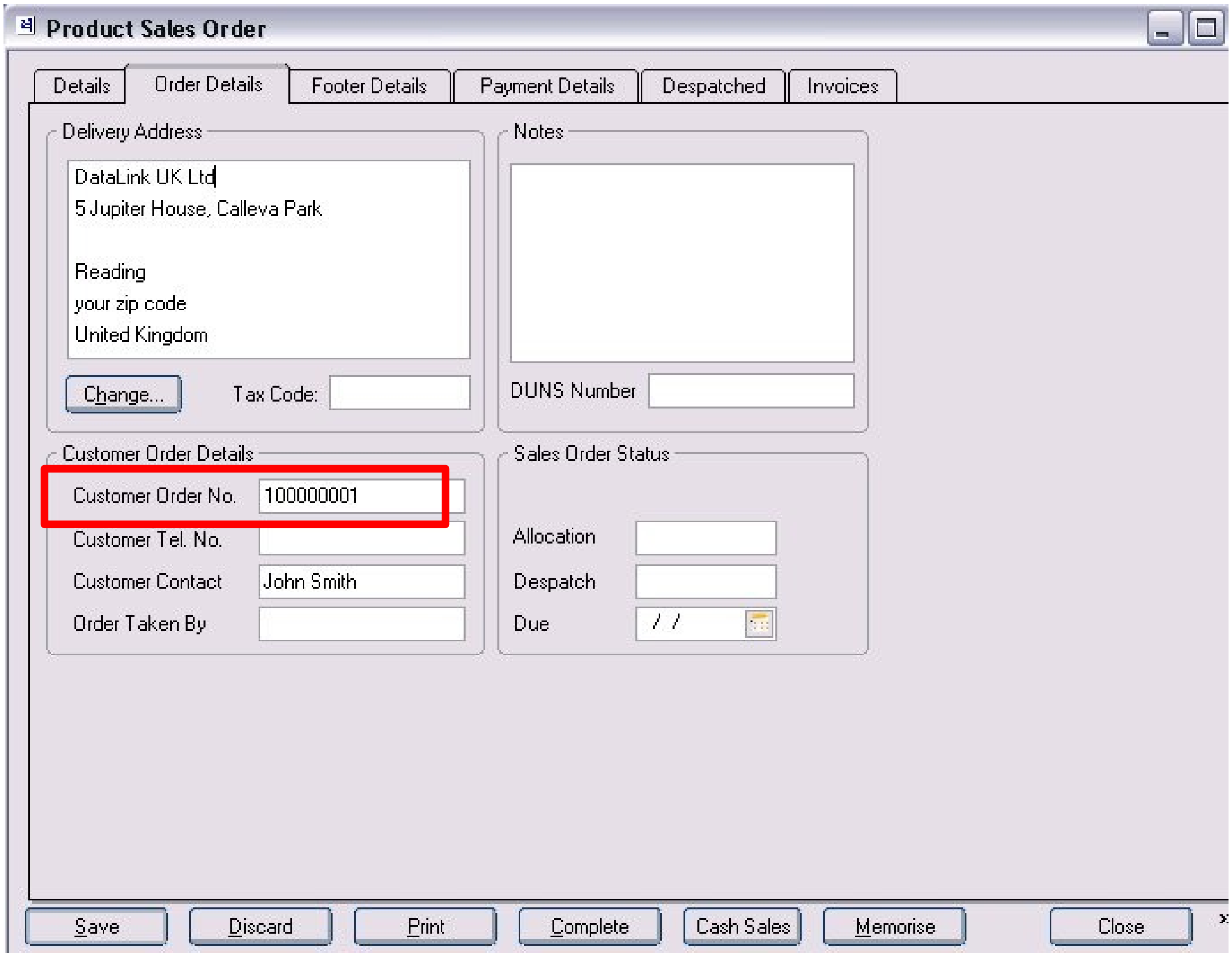


12. View order's details on the webpage:

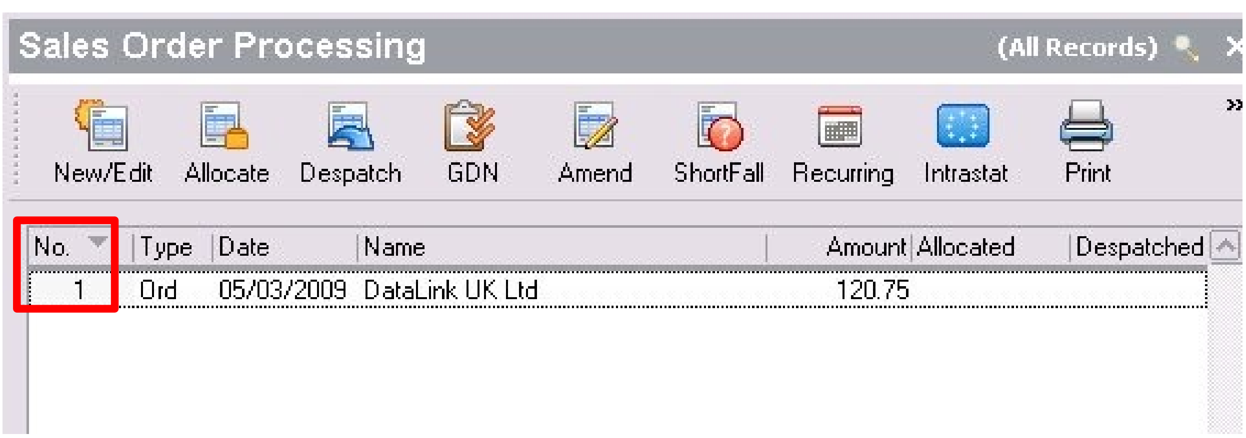


Order ID Number

Order ID number in Sage can differ from Order ID number on the website. Let's view this on a certain example: from the Product Sales Order window in Sage Line 50 click the **Order Details** tab. See the website Order ID number in the **Customer Order No.** field.



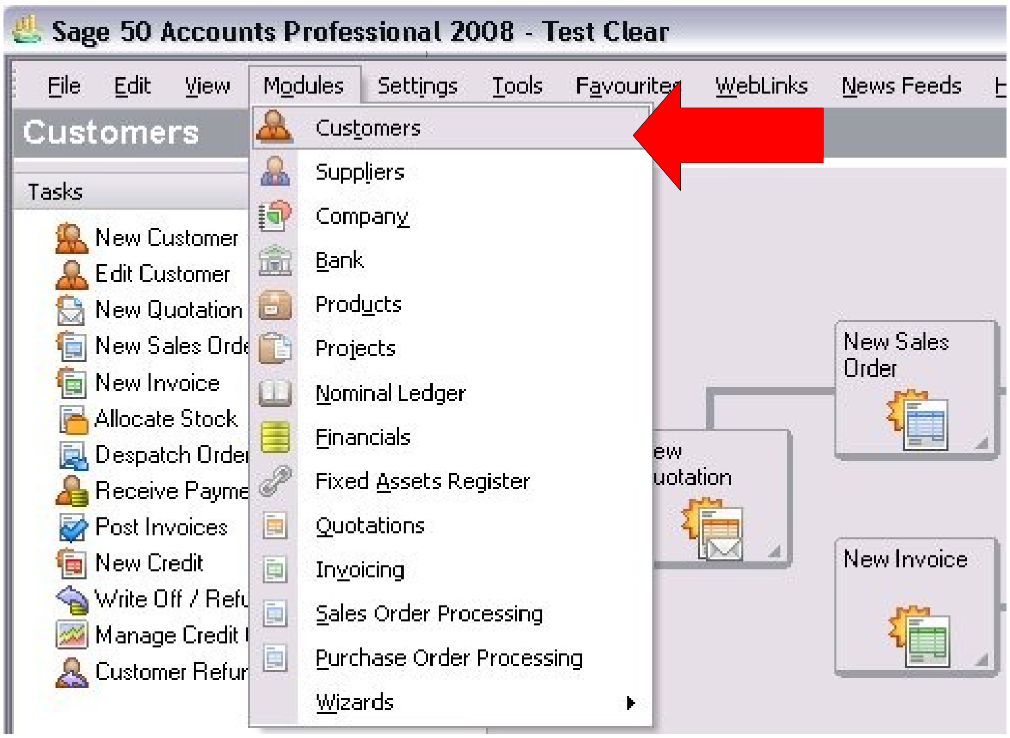
The Sage Order ID number is shown on the **Sales Order Processing** screen, in the first column of the grid.



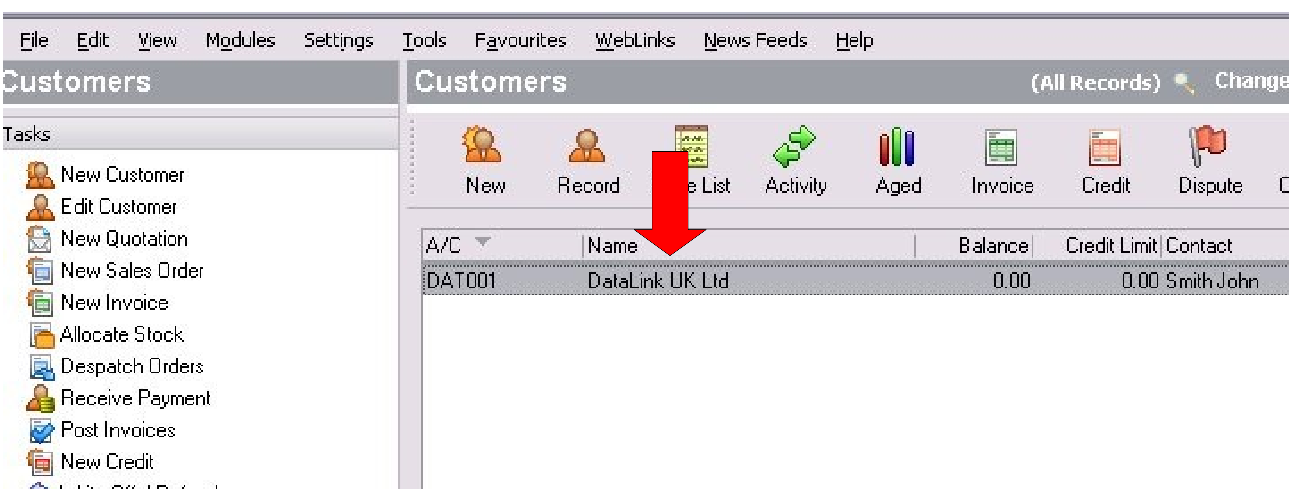
(An example above shows the Order ID on site is '100000001', while the Order ID in Sage is '1')

Customer Details

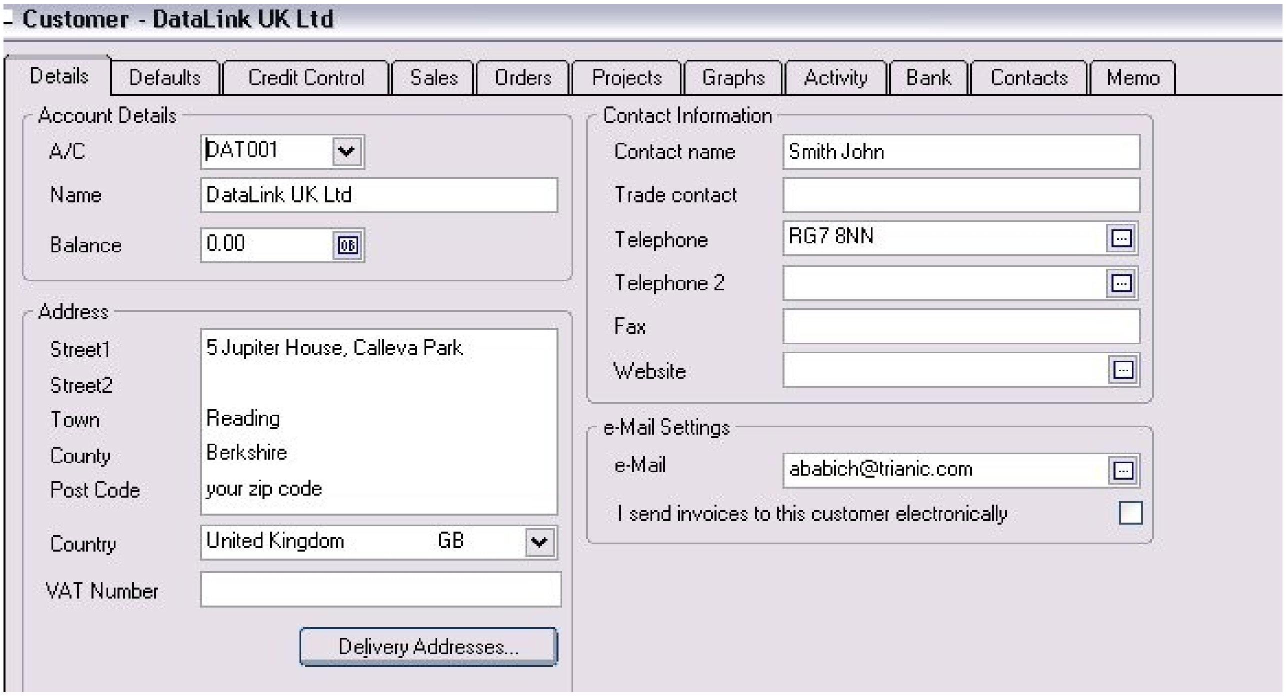
1. To view customer's details in the **Sage Line 50**, press **Alt-O**, and **T** hotkeys. Or, click **Modules**, and select the **Customers** item in the upper menu. Or, in the left panel, under the '**Links'** click the **Customer List** item and view a list of new customer(s) downloaded to Sage Line 50 database.



Double-click on the customer's name in the list to view details.



Customer's Details in Sage Line 50:

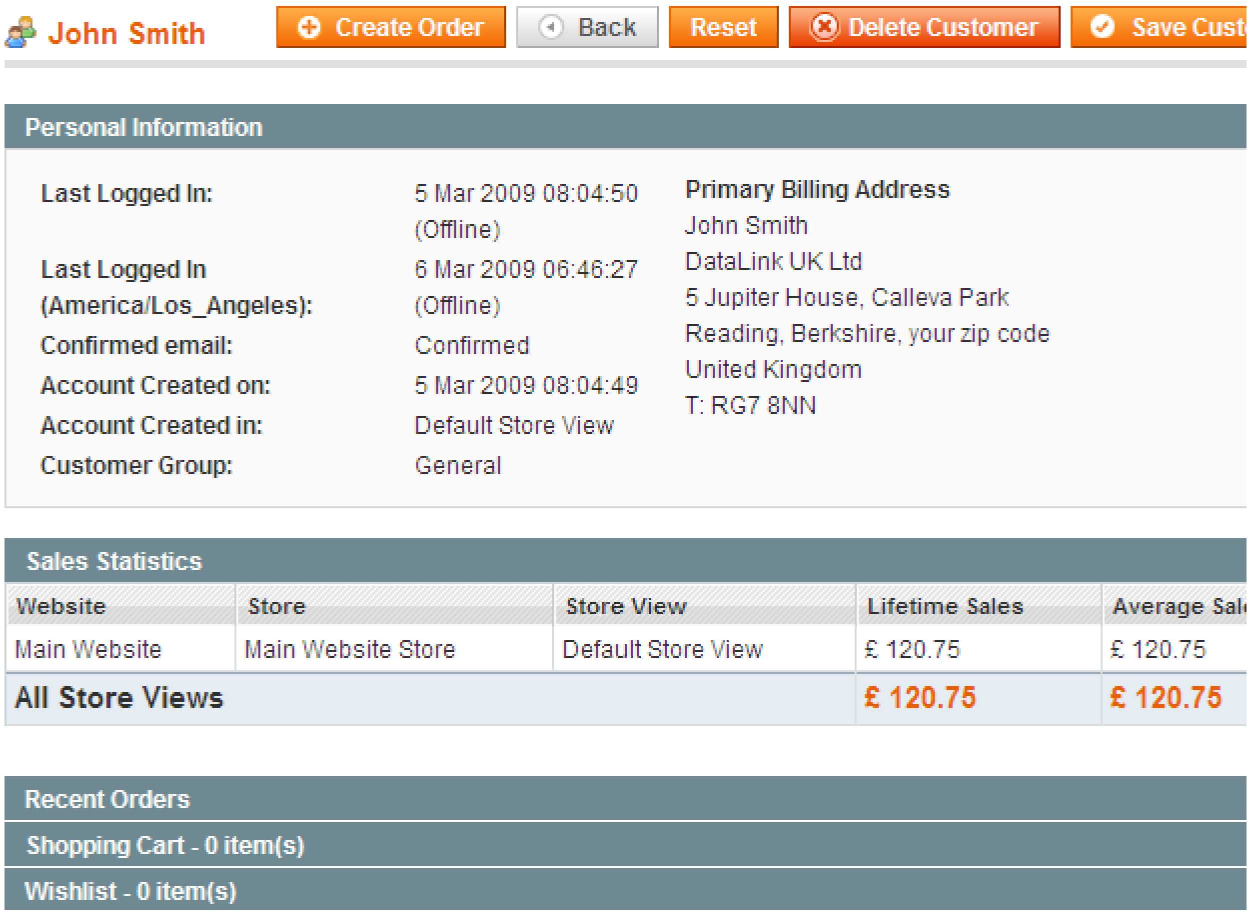


3. After viewing the customer's details in Sage, go to the Magento web-site (Administrative part).

4. Click the **Customers > Manage Customers** link.

5. From the Customers page select a record in the list and click the **Edit** link.

6. Here you can view customer's details to make sure that its information was downloaded to Sage properly.



7. When you have finished working with the Web DataLink for Sage Line 50, right mouse click on the Web DataLink icon in system tray and select the **Exit** item.

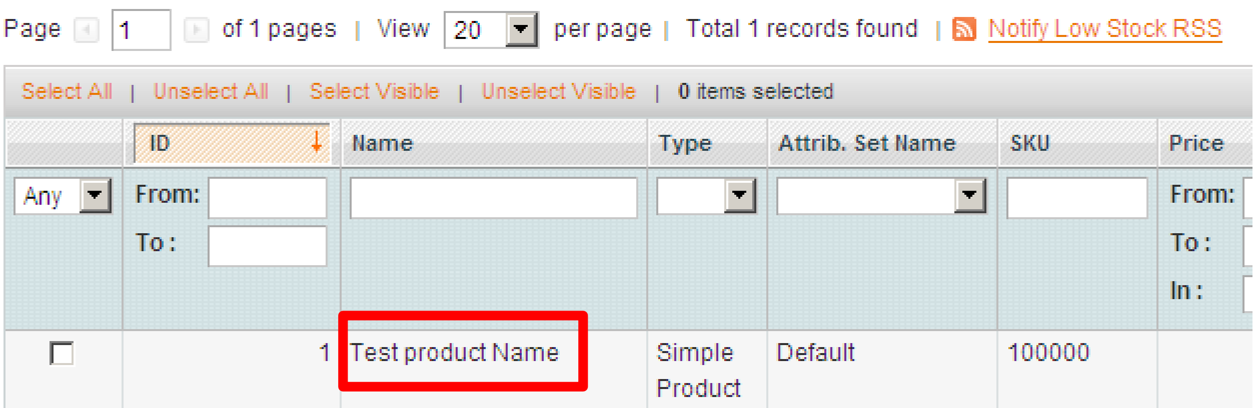
8. Answer “Yes” in the message appeared on the screen to confirm exiting of the program.

Product Data Synchronized

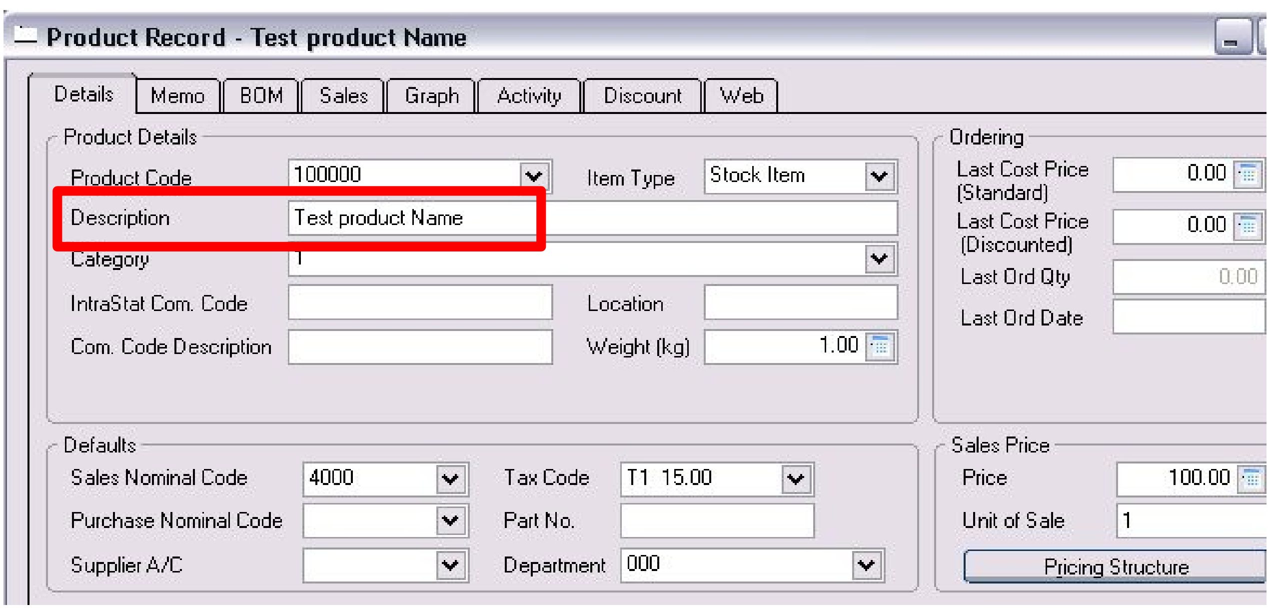
The following data is synchronized during DataLink for Sage activity:

- **Product Name**

Site:

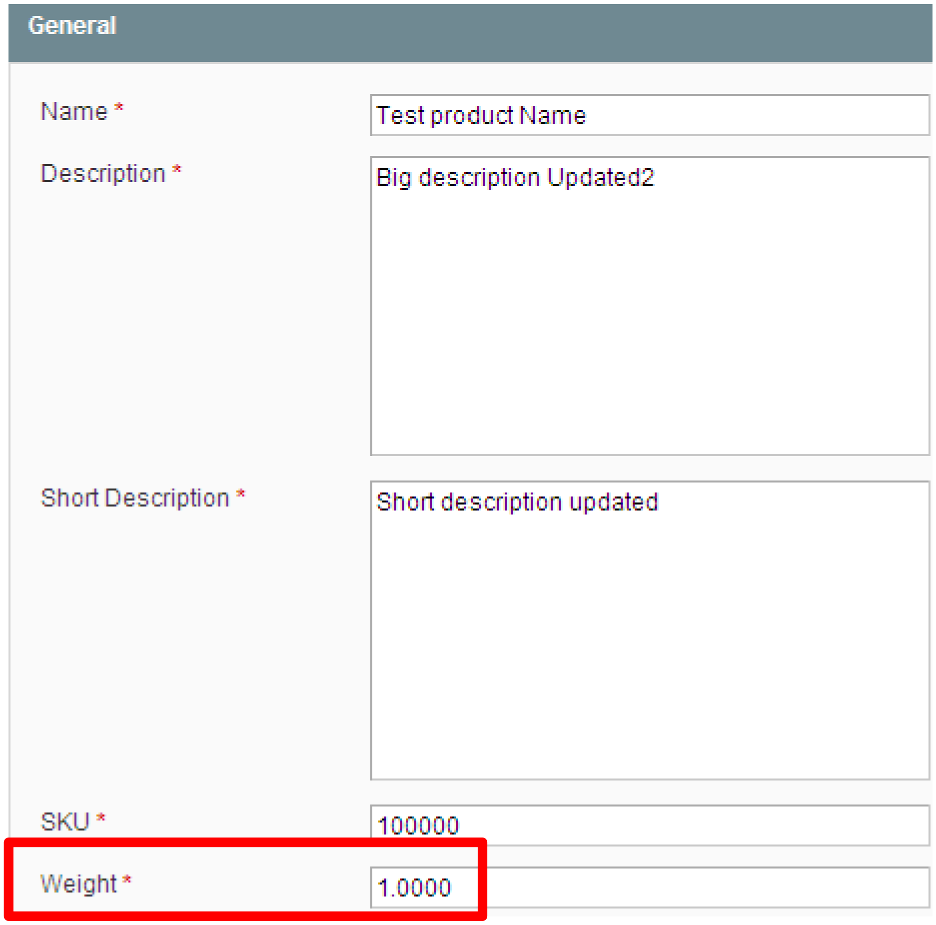


Sage:

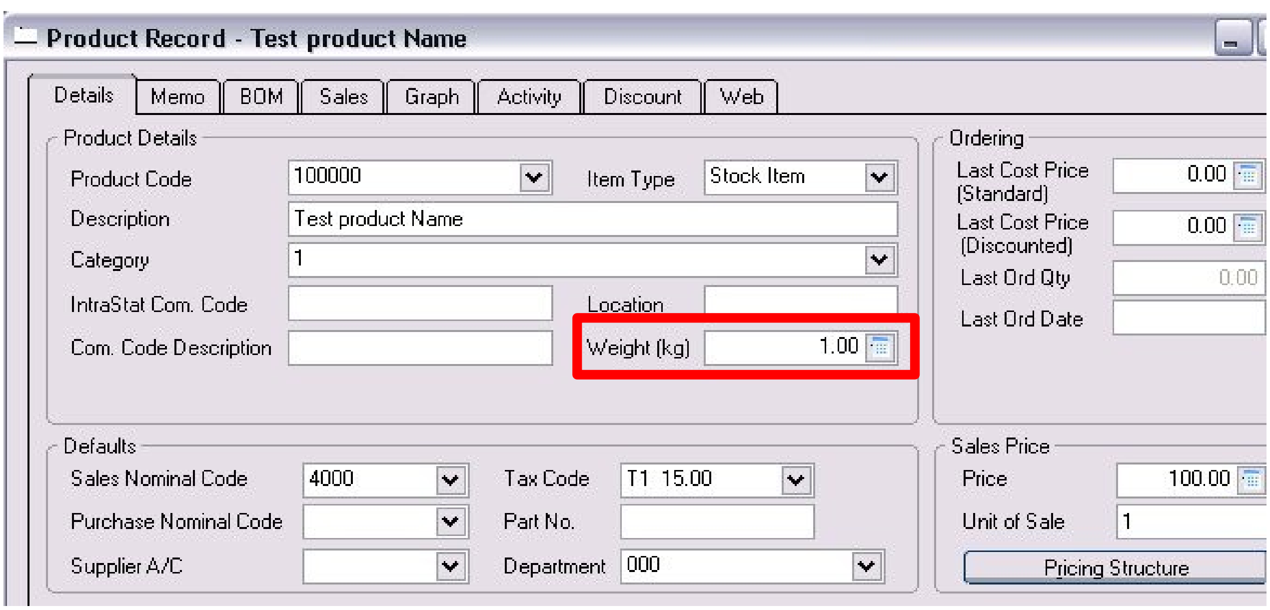


- **Product Weight**

Site:

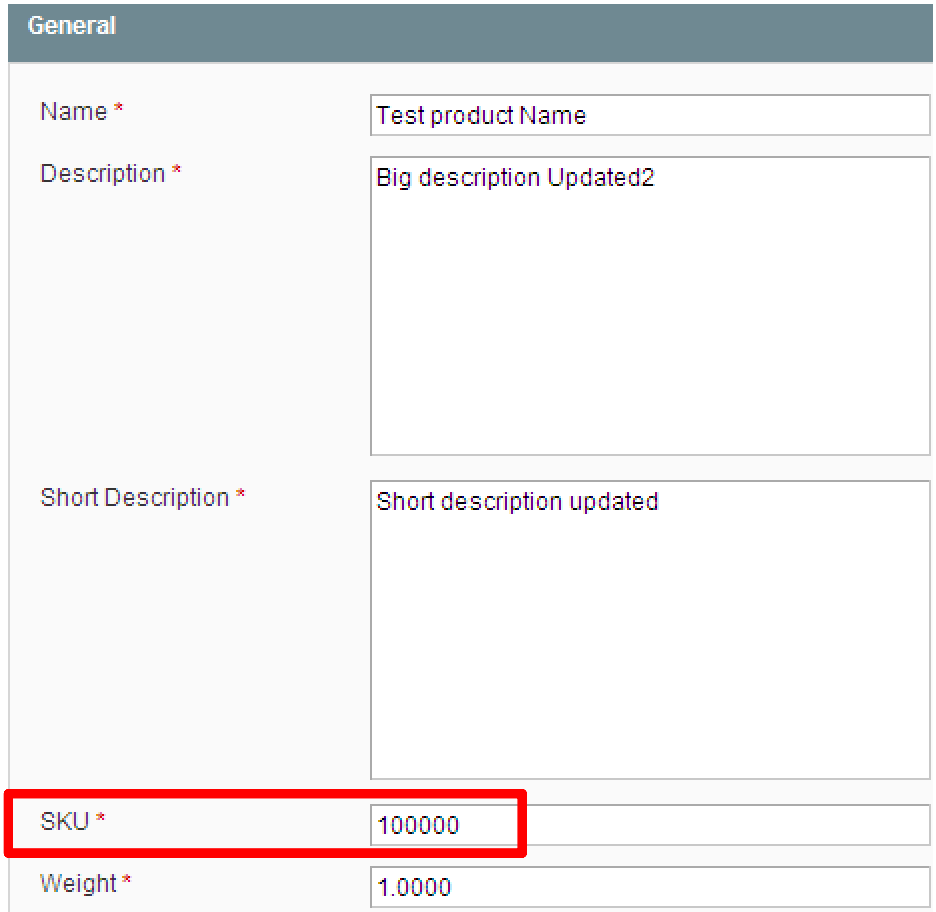


Sage:

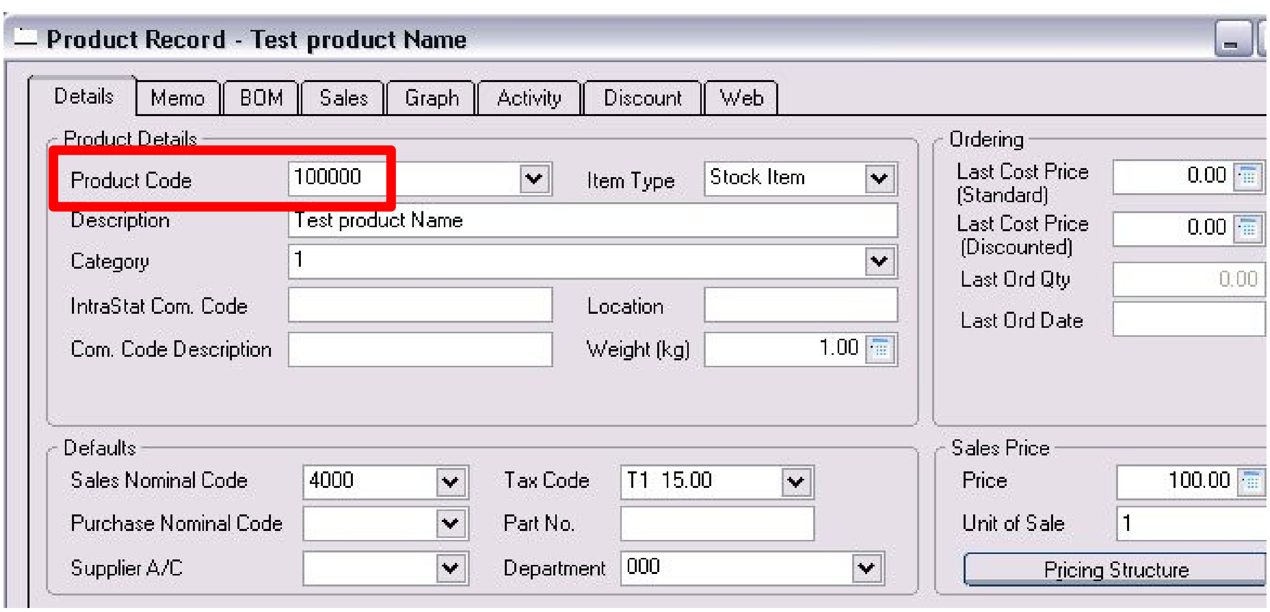


- **Product Model**

Site:

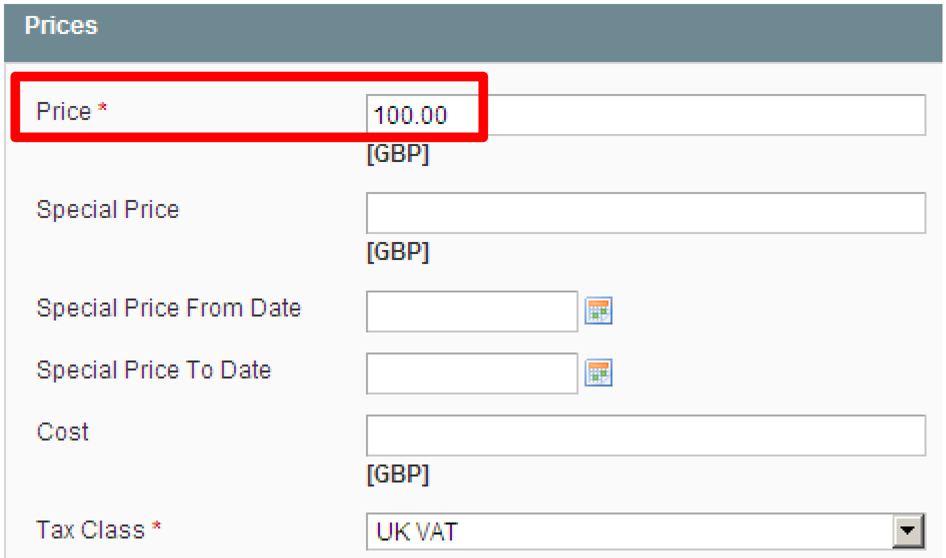


Sage:

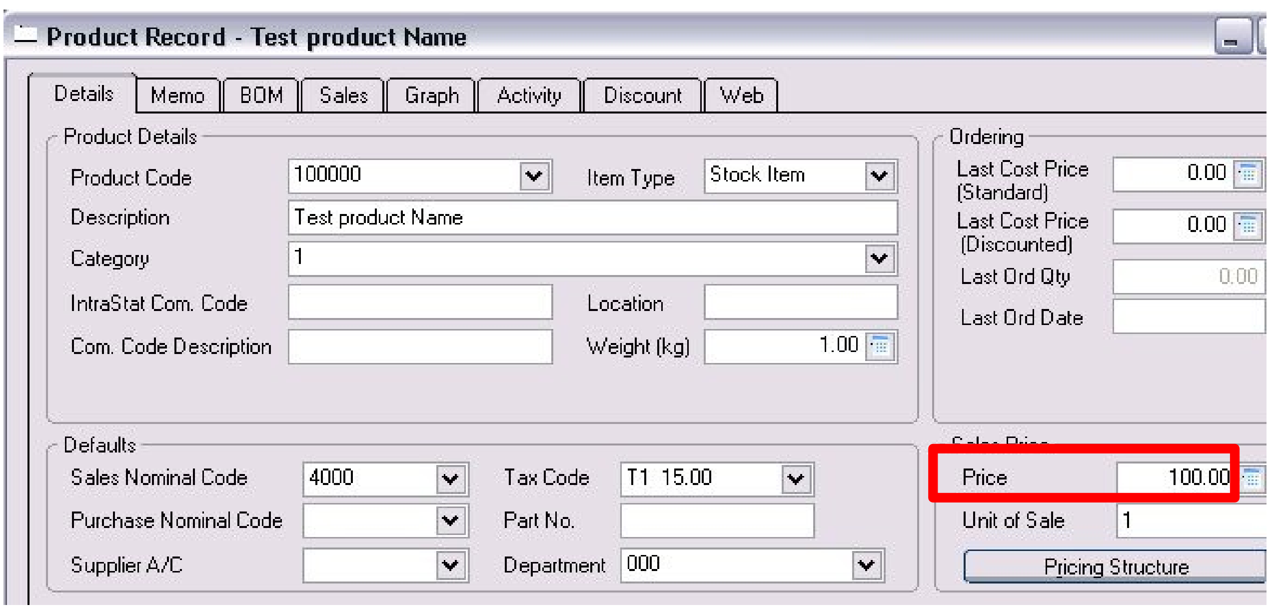


- **Product Price**

Site:

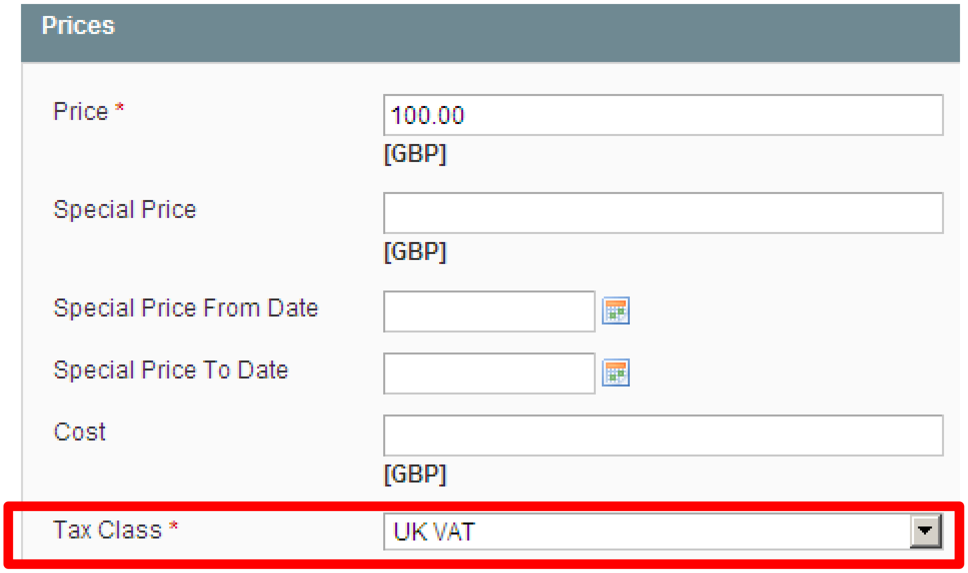


Sage:

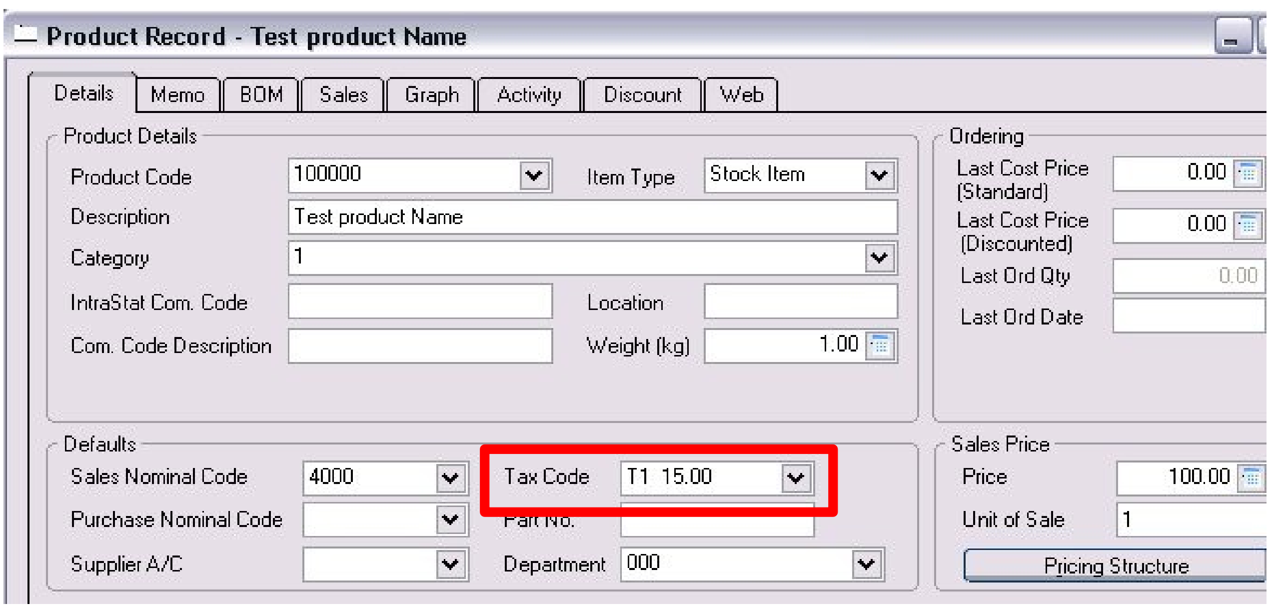


- **Tax Class**

Site:

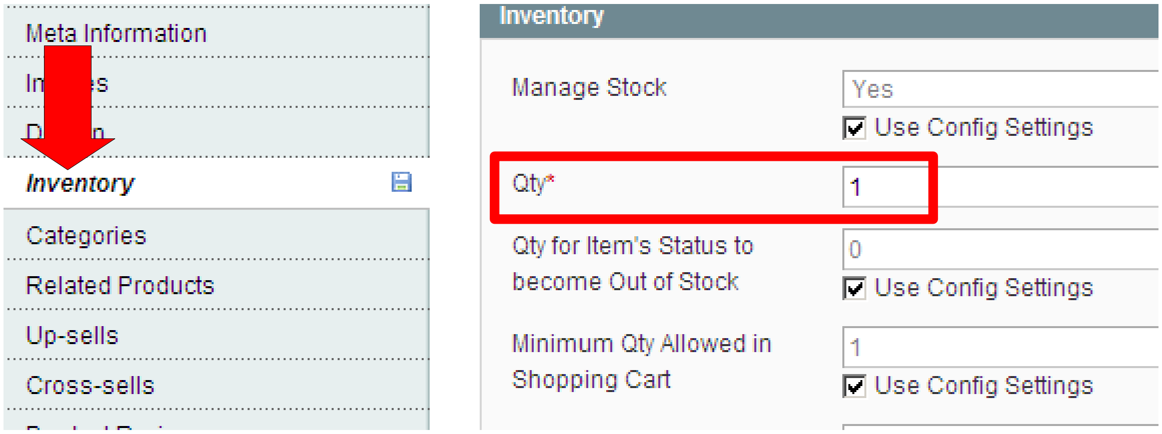


Sage:

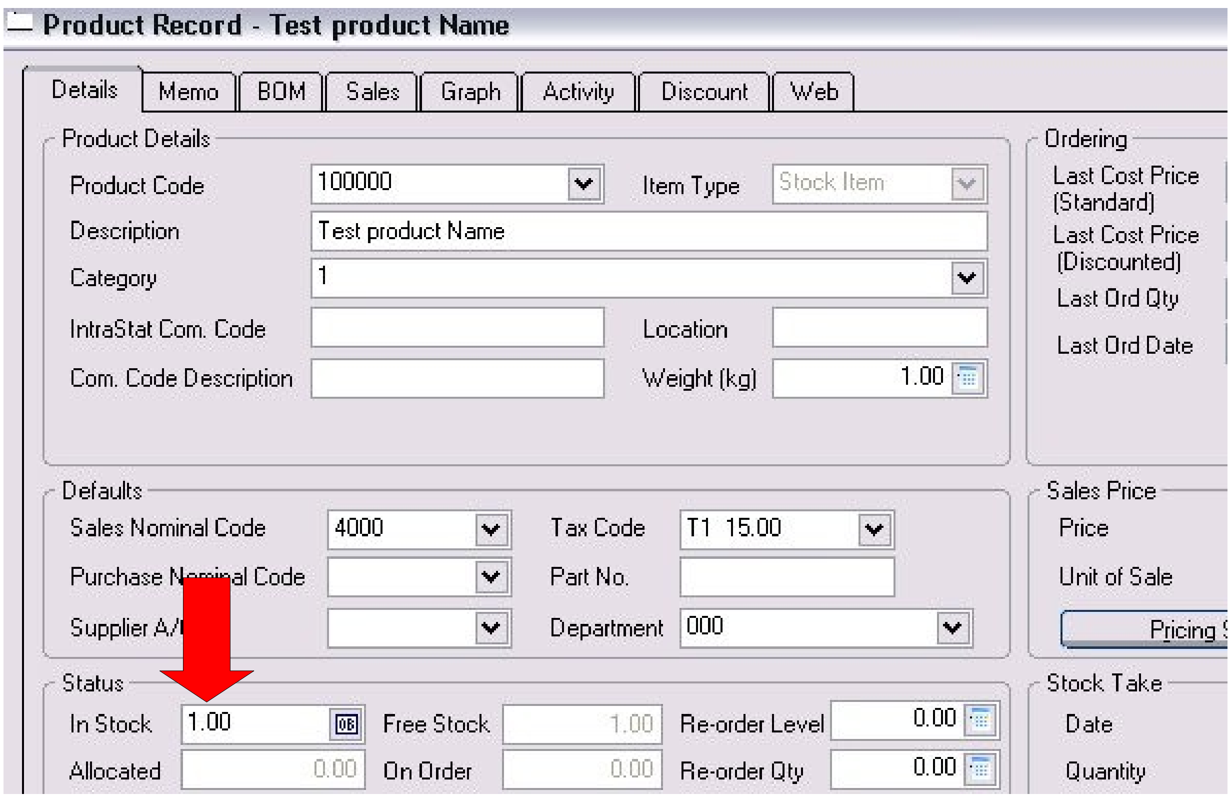


- **Product Quantity (Stock)**

Site:

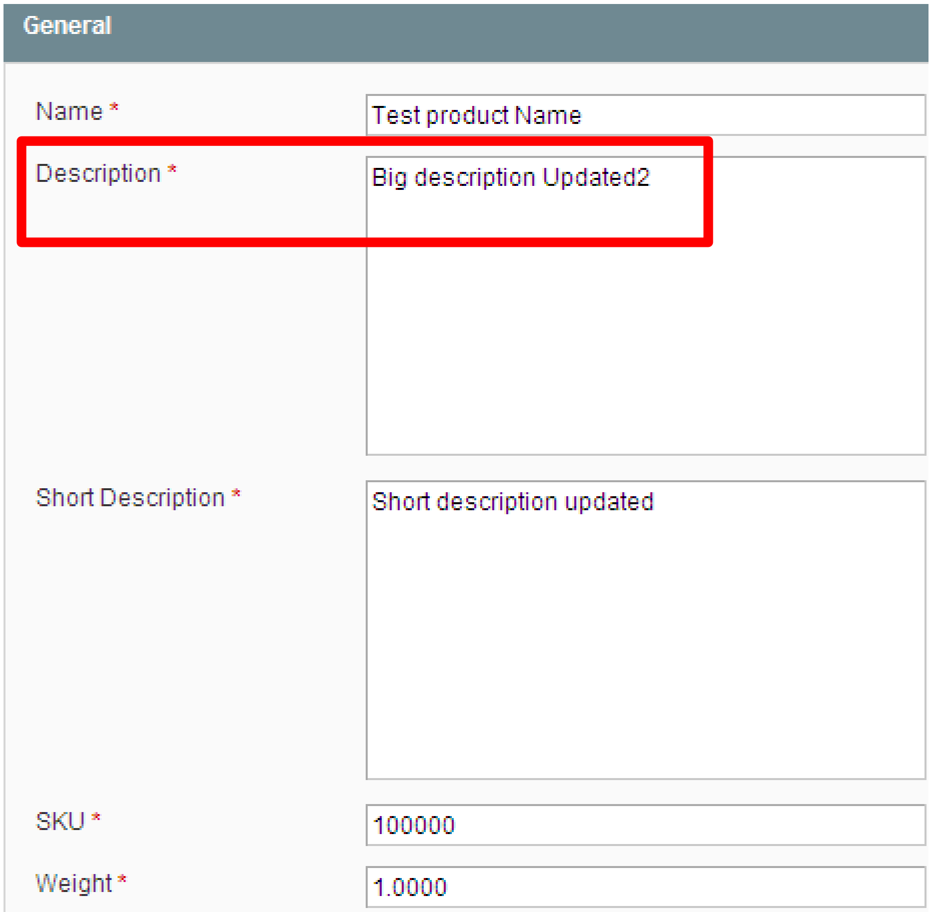


Sage:

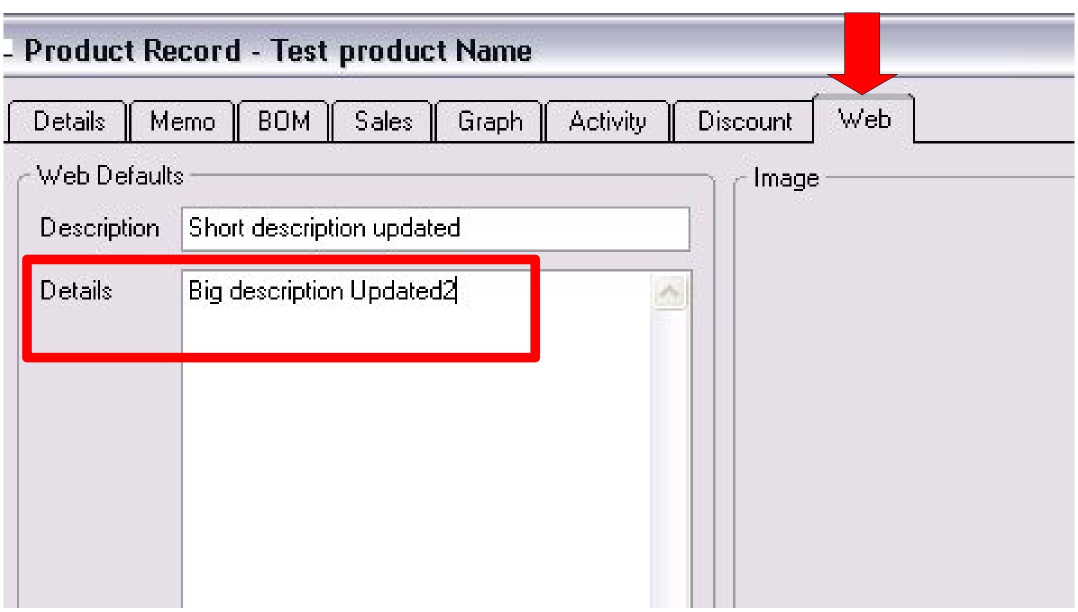


- **Product Description**

Site:

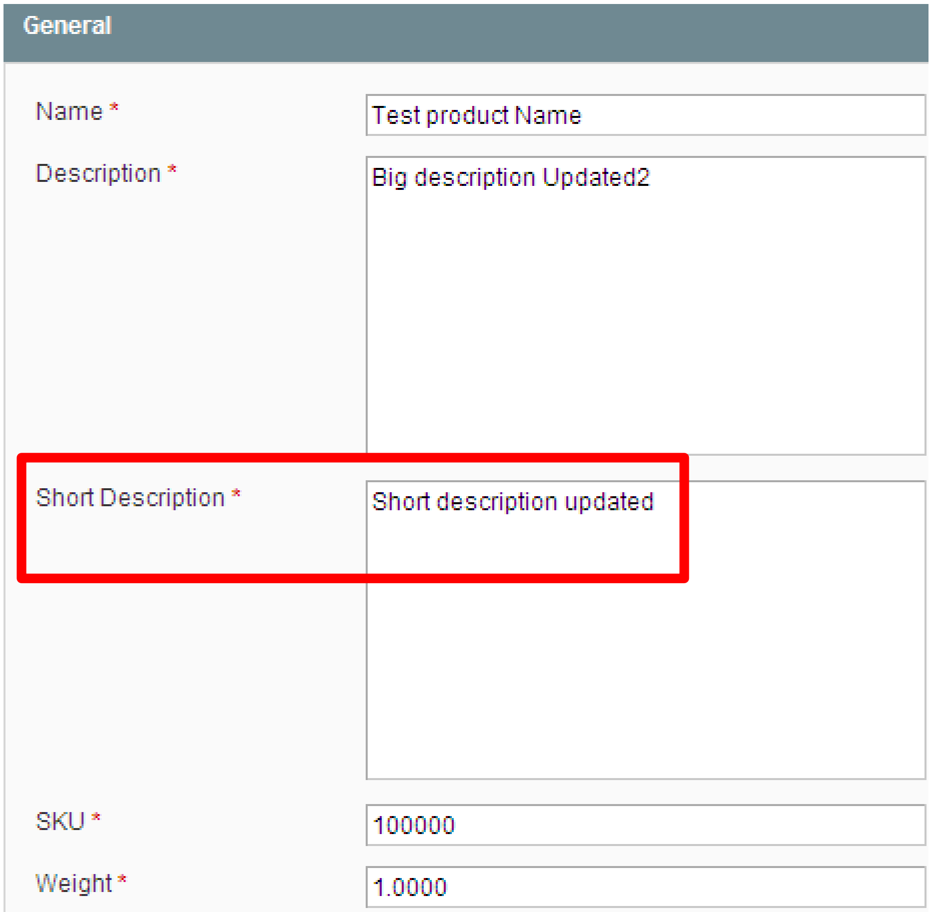


Sage:

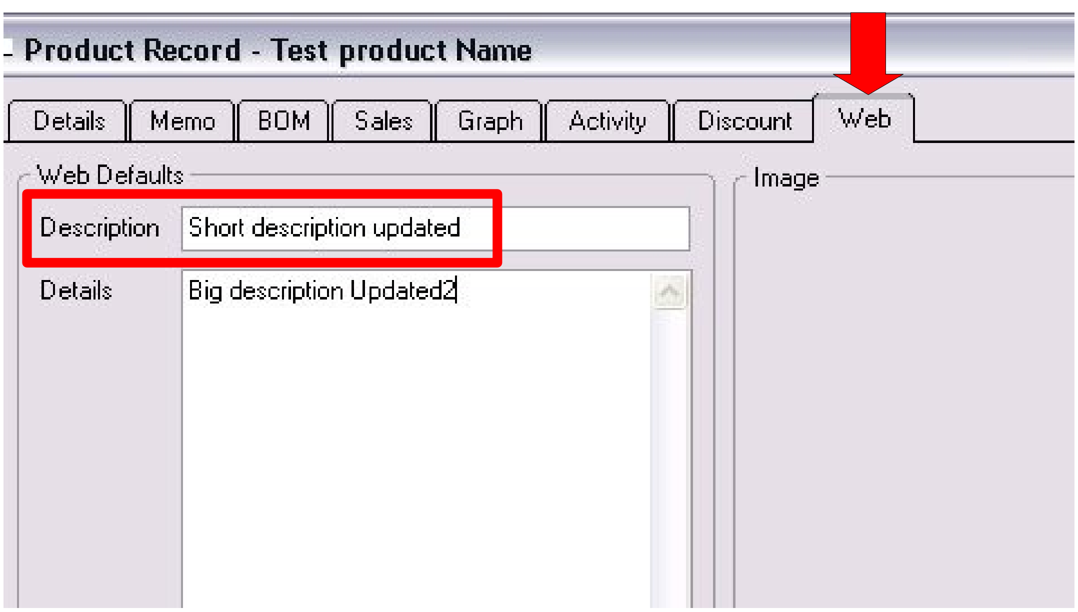


- **Product Short Description**

Site:

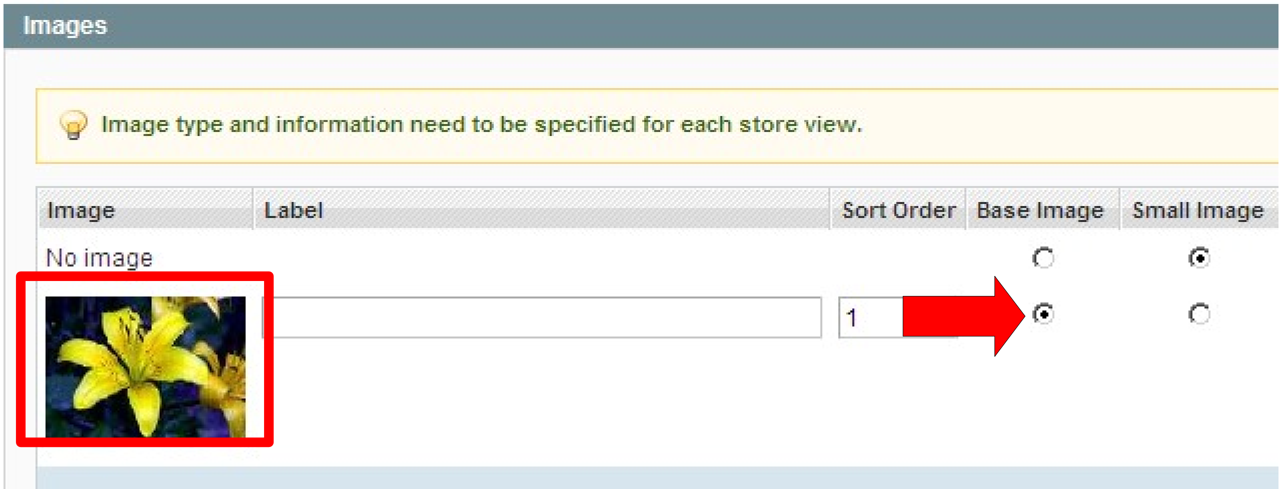


Sage:

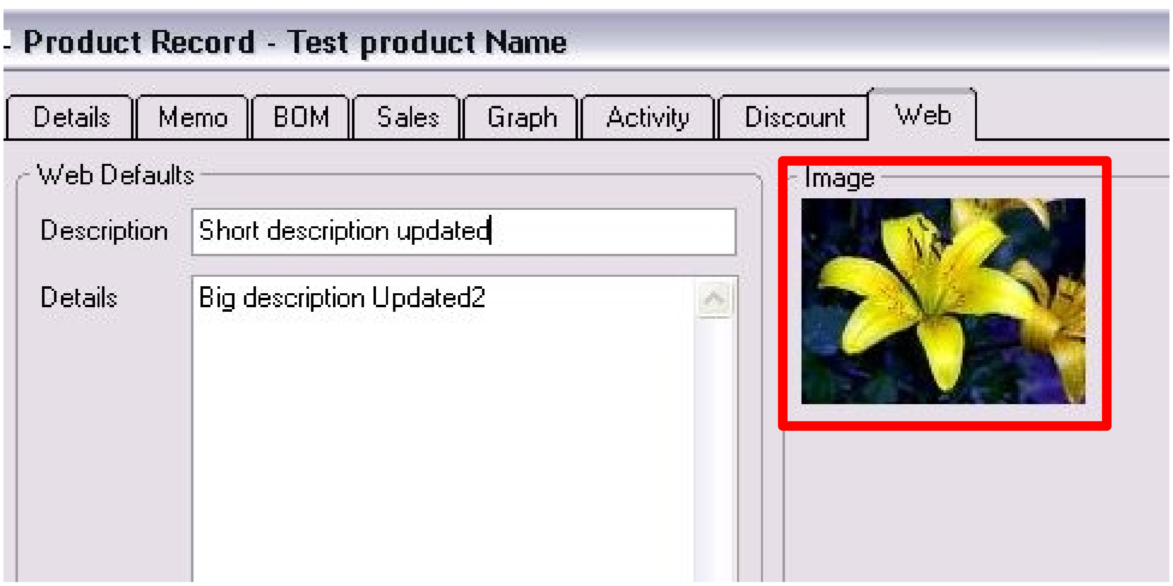


- **Product Image**

Site:



Sage:



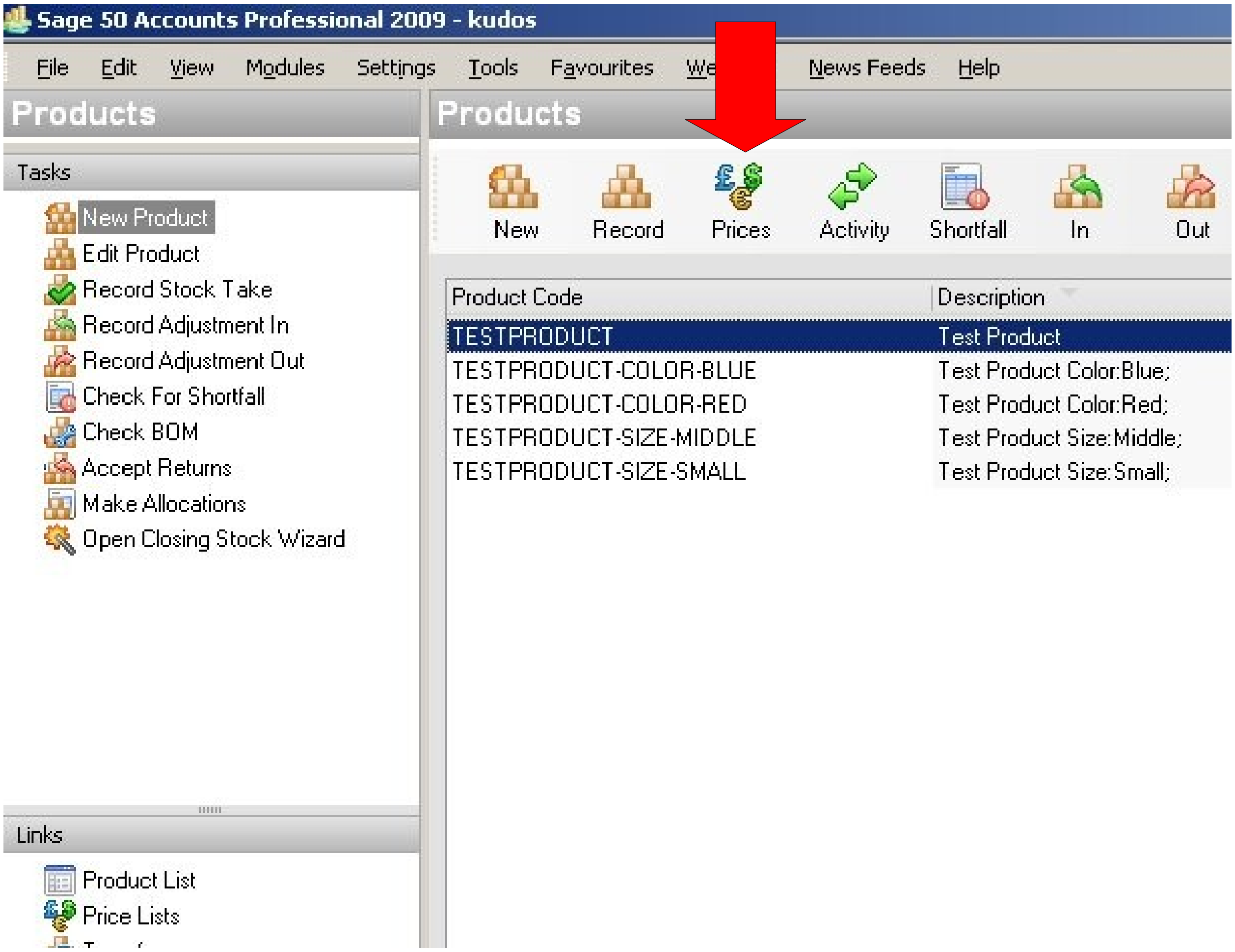
NOTE: *If there is an old product image on site, this will be replaced with a new product image from Sage during synchronization.*

B2B

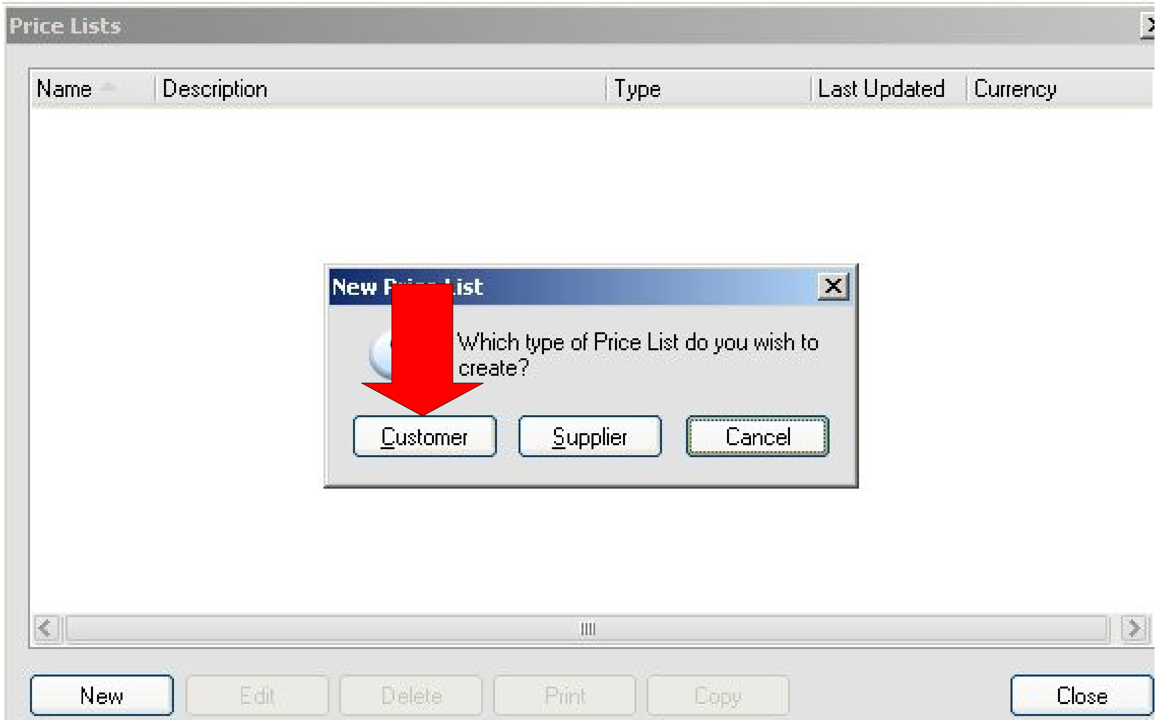
The B2B module is an additional functionality.

You have a possibility to synchronize customers group and product group discount values from site into Sage (as well as add this data manually in Sage).

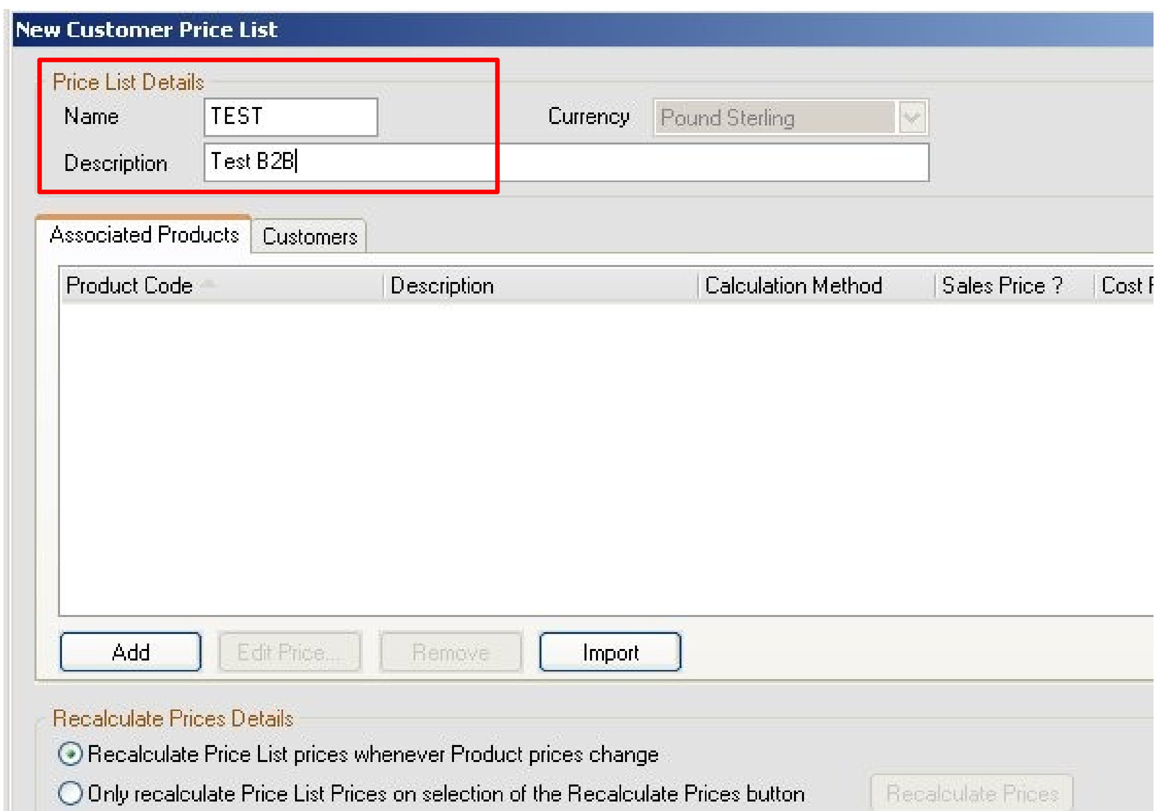
To add a new customers group and specify discount for products, go to **Sage > Prices**:



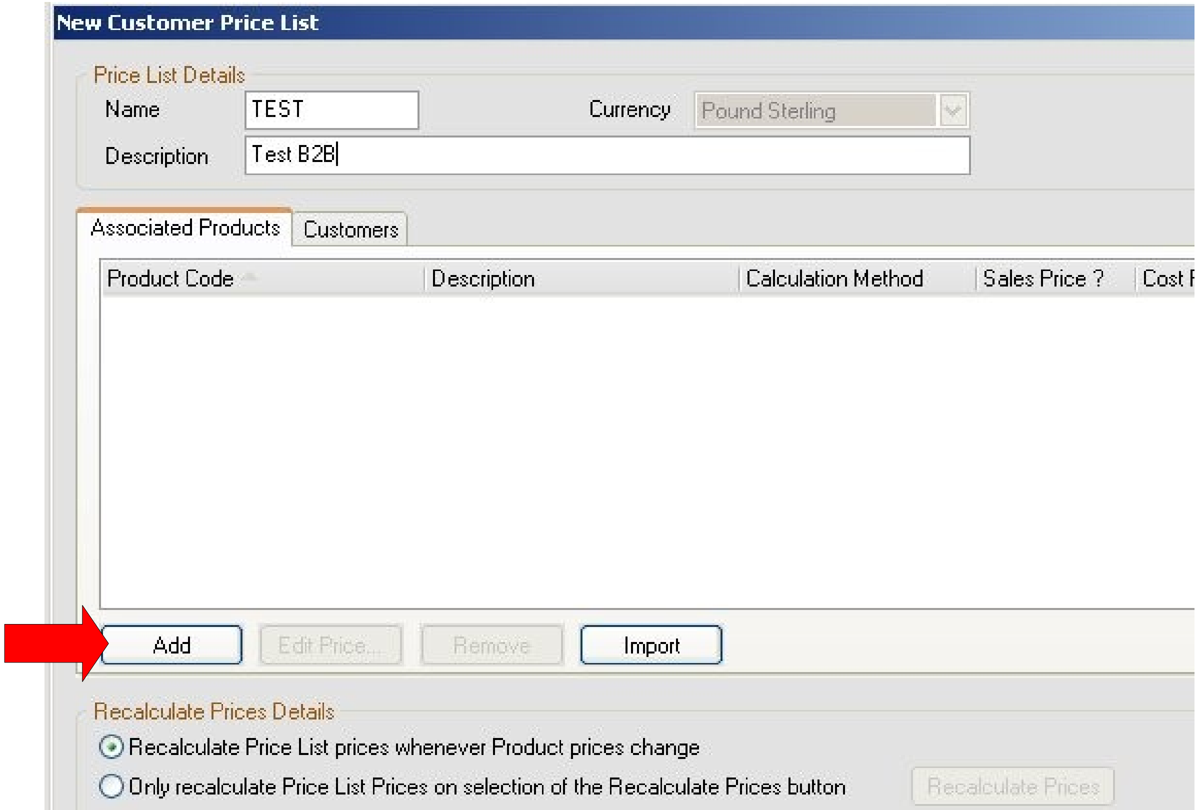
Click the **Customer** button on the popup window.



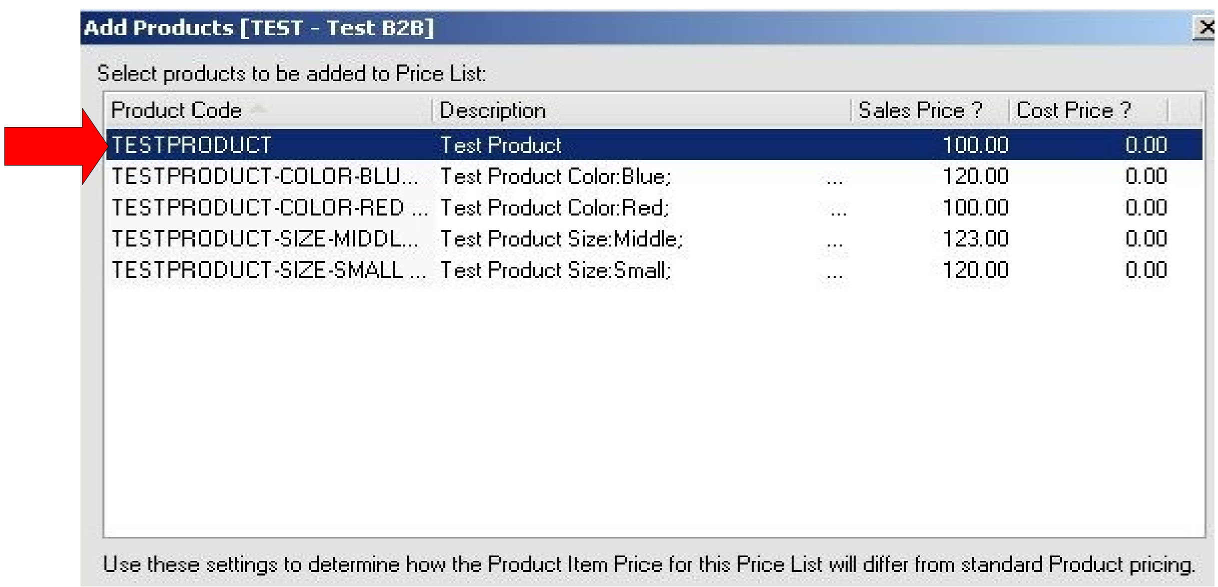
Specify **Name** and **Description** of new customers group.



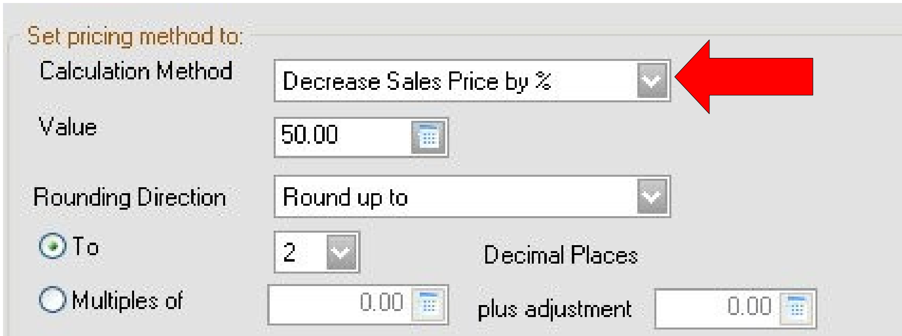
Click the **Add** button to specify products' discounts for newly created group.



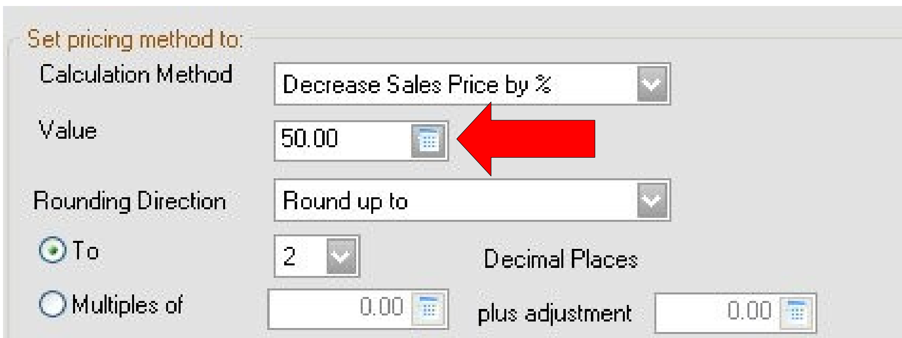
First, select a product in the list.



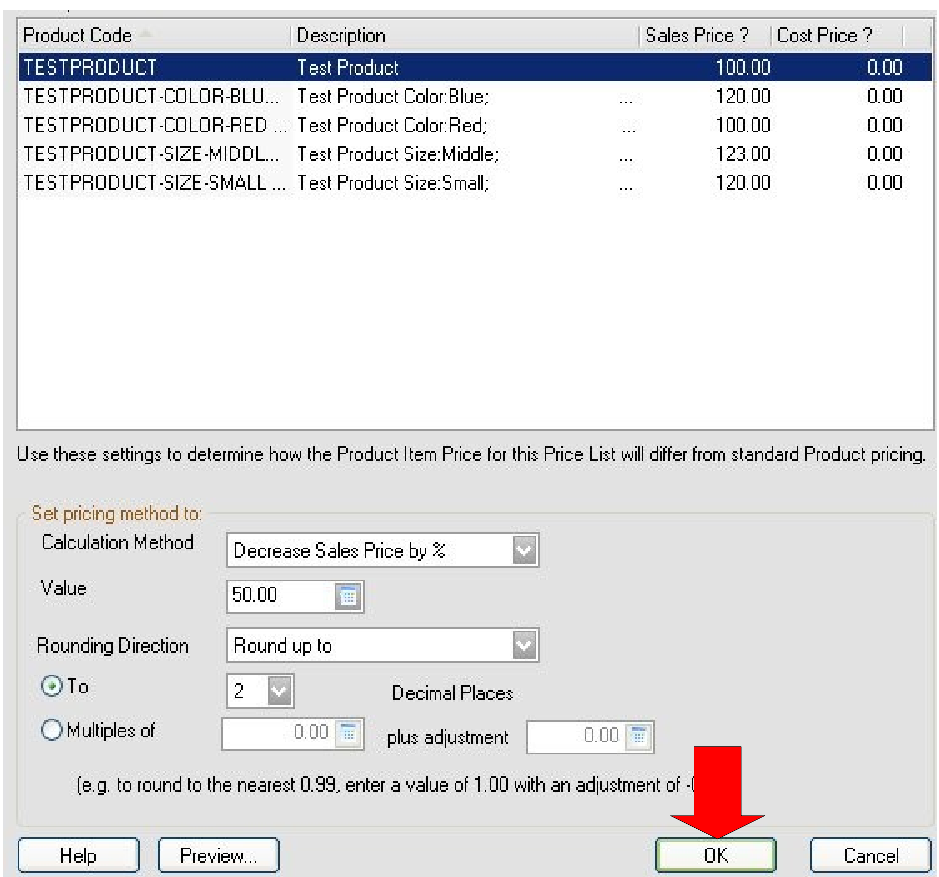
Then, select **Calculation Method** from dropdown.



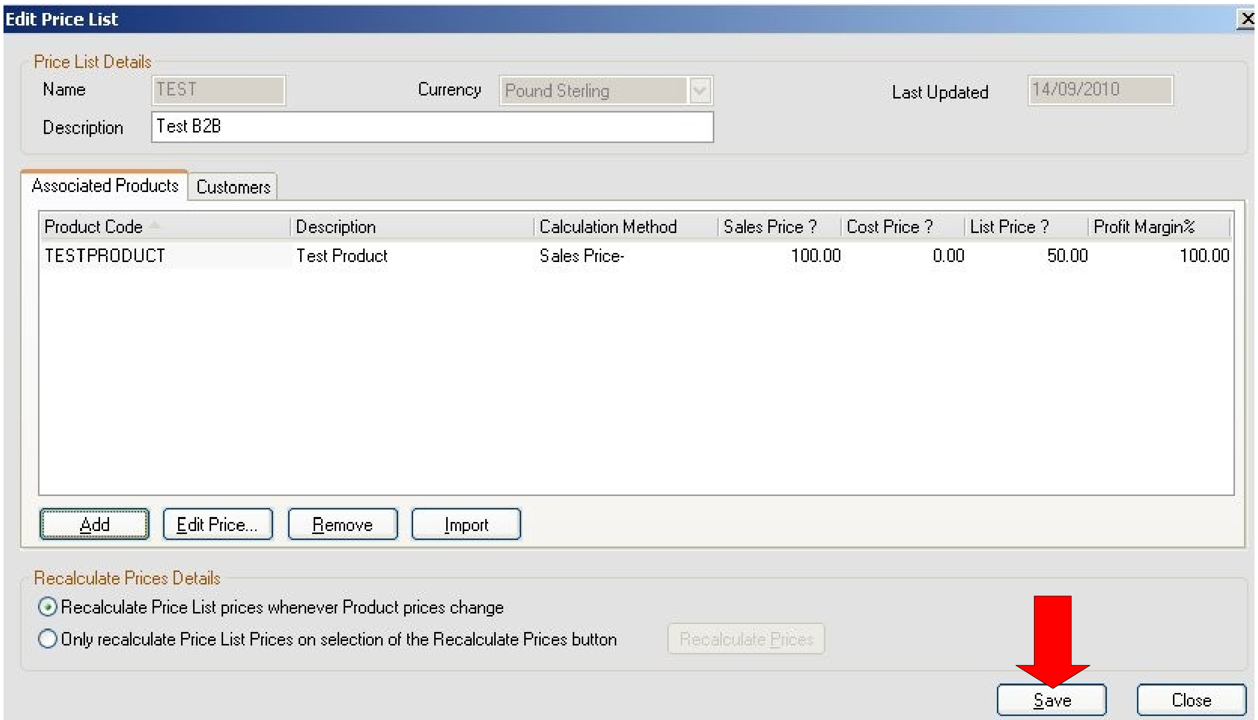
And then, specify a discount **Value**.



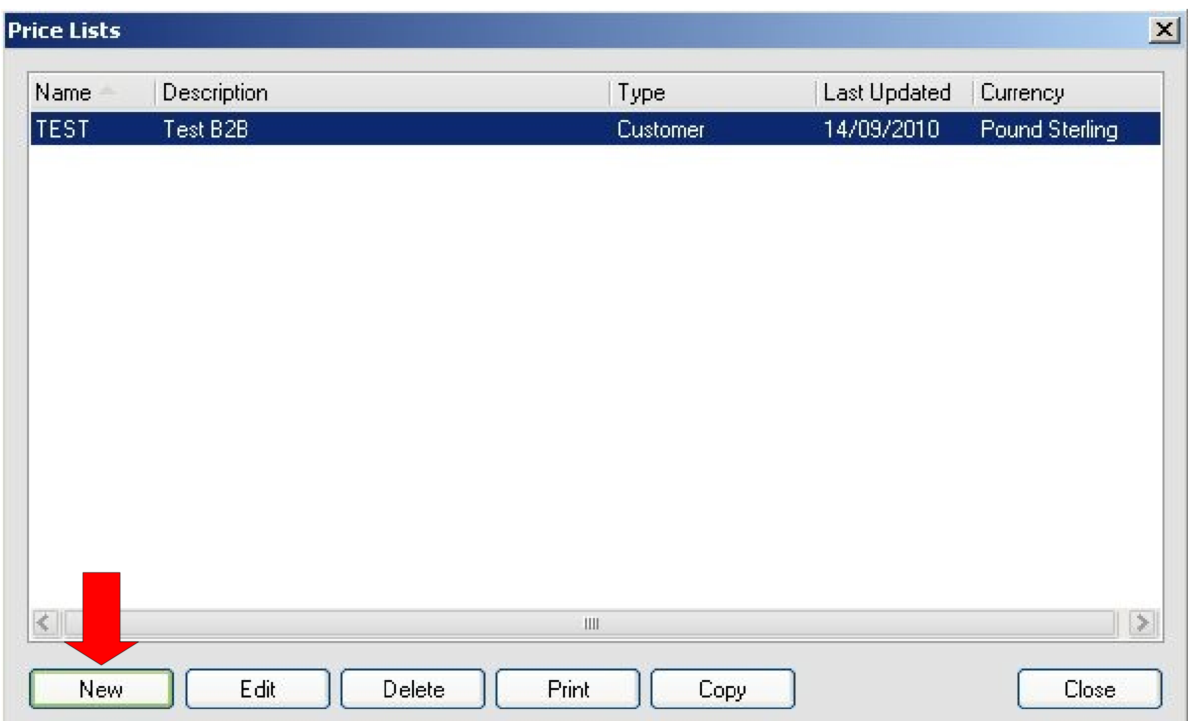
Click **OK**.



And click **Save** in the next window.

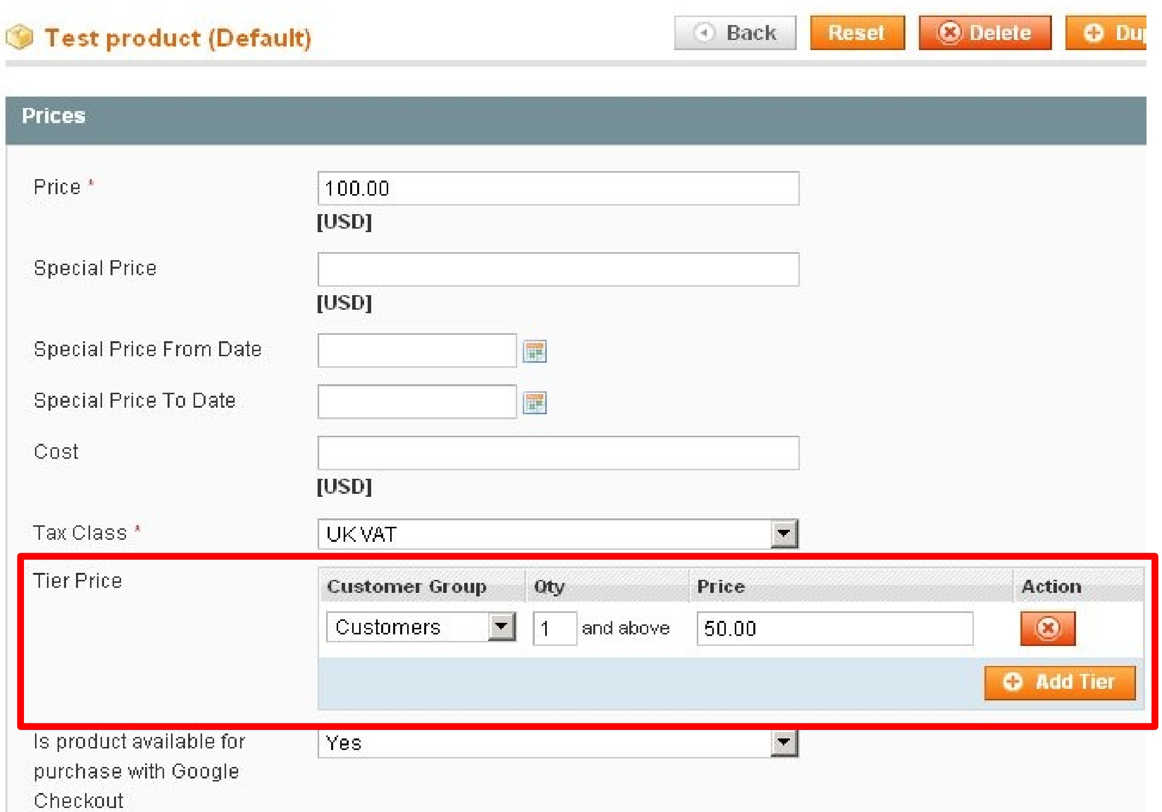


You will be returned to the window where you can add a new group using the **New** button if you wish.



After uploading data from Sage to site, you can go to Magneto site and check this. Open **Catalog > Manage Products > Prices**:

In the **Tier Price** box you can see data uploaded to site.

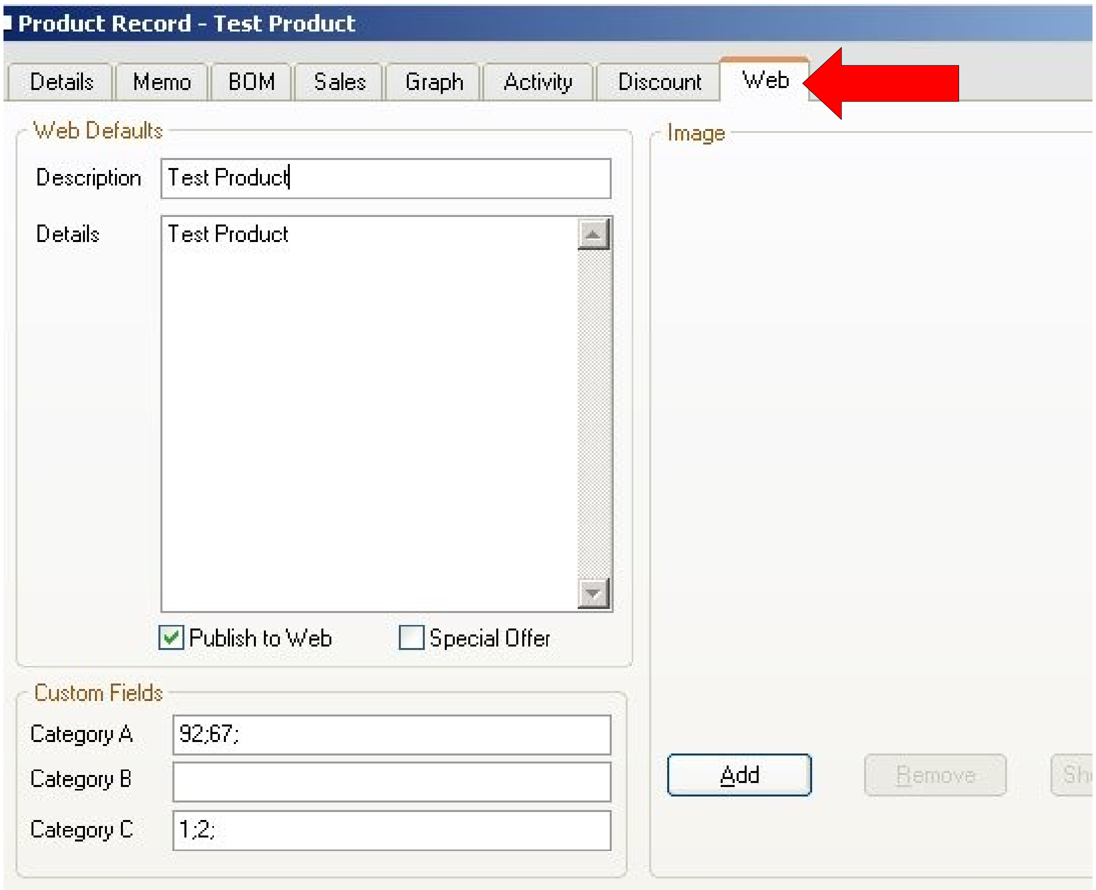


Multi Store

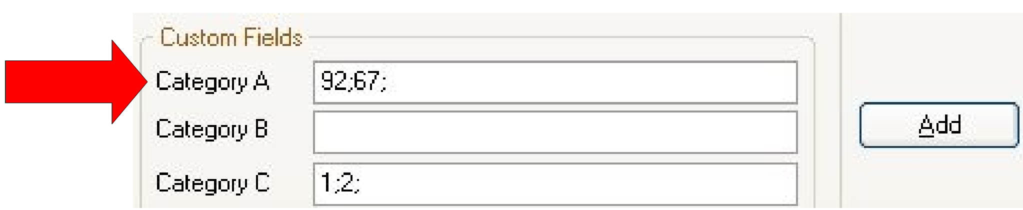
The **Multi Store** module is an additional functionality.

Now you can synchronize products categories of your different frontends from Sage to site and vice-versa.

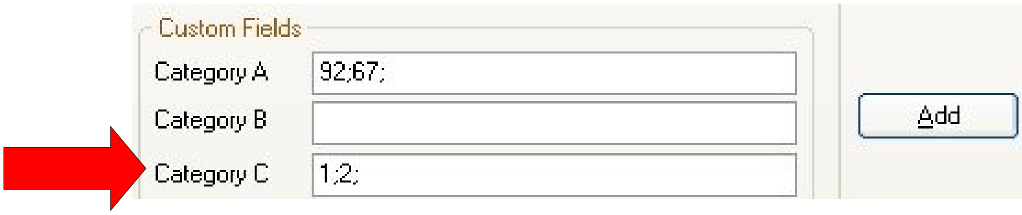
After synchronization of products from site, go to Sage > Product Record window and open the **Web** tab.



Categories IDs are stored in the **Category A** field. In the screenshot, 2 categories IDs are displayed. These IDs belong to certain webshop frontends, and so are displayed in a certain order (and semicolon separated): **92;67;**



Website frontends' IDs are stored in the **Category C** field below and also shown in a certain order (and semicolon separated): **1;2;**.



Website frontends get their ID numbers according to the date of their creation: the very first site will get ID = 1, website created secondly will get ID = 2, etc.

Note: Be attentive while specifying categories' IDs in Sage manually: put them in a proper order according to websites' IDs. For example, like it is shown on screenshot above: category 92 belongs to frontend 1, and category 67 belongs to frontend 2.

Inventory

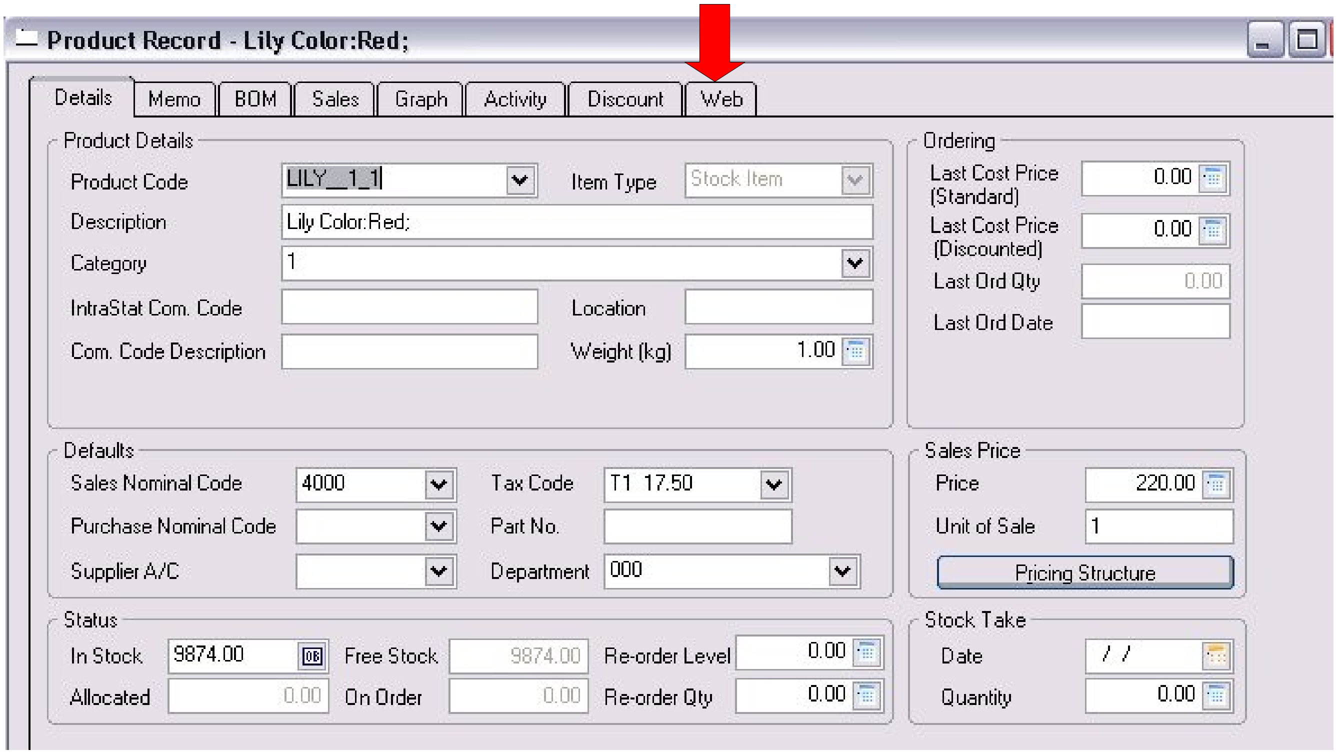
Please pay attention to Products Attributes and their values displayed in Sage. Their order of display is as follows:

[Product Name] [Attribute Name:] [Attribute Value;] [Attribute Price;]

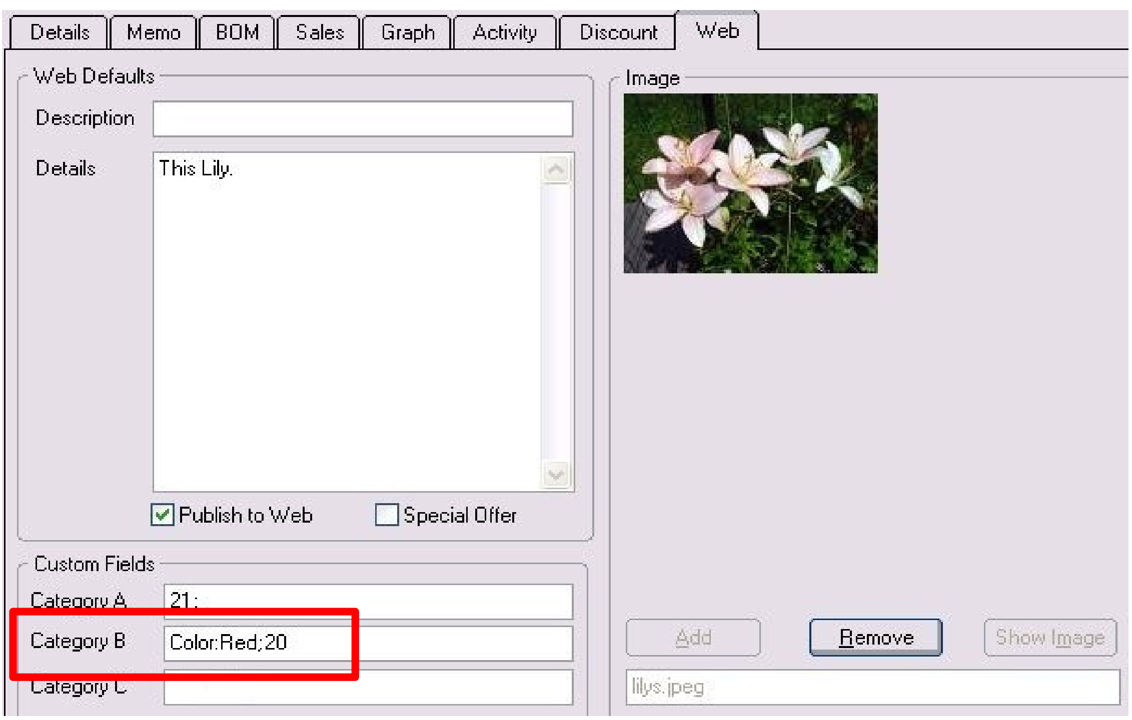
For example:

Lily Color:Red;20;

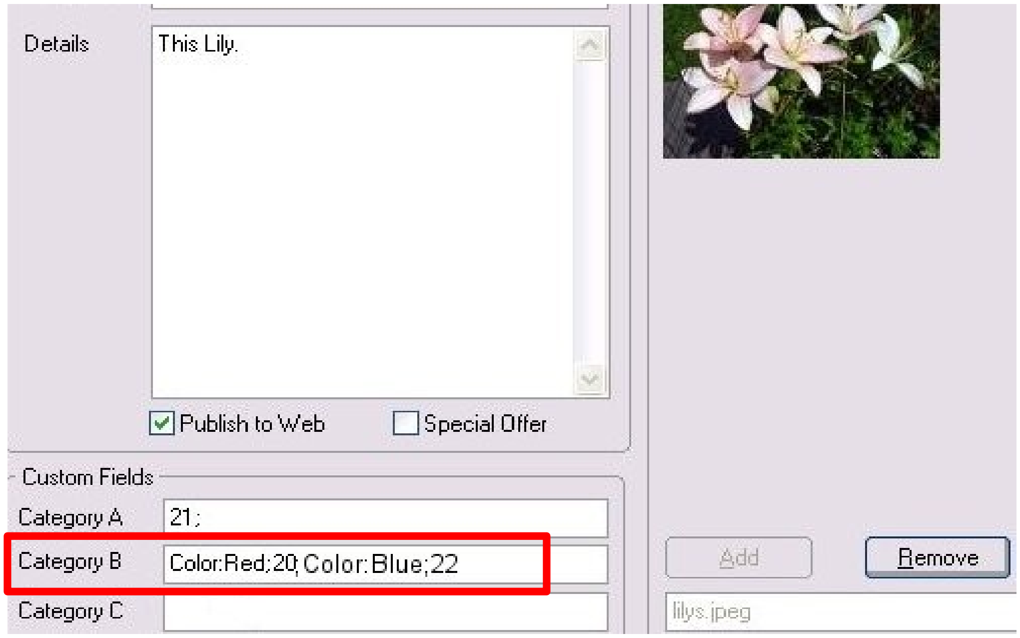
Double click in an attribute's name to review details. In the Product Record details window click the **Web** tab.



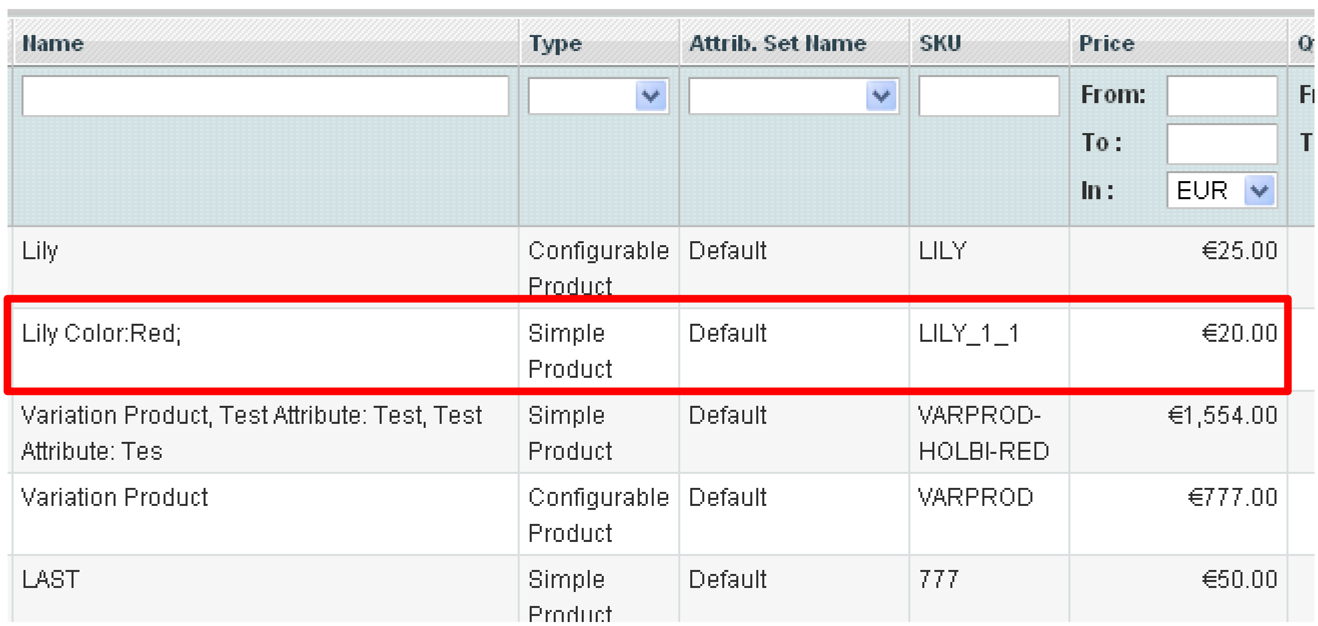
Attribute's name, value and price are stored in the **Category B** field in Sage (according to the displaying order described above):



Note: If there are a few attributes, they will be displayed semicolon separated. For example:



You can go to Magento site and check if the attributes data has been downloaded properly (go to the Catalog > Manage Products):



Name	Type	Attrib. Set Name	SKU	Price	Q
				From: To: In: EUR	F T
Lily	Configurable Product	Default	LILY	€25.00	
Lily Color:Red;	Simple Product	Default	LILY_1_1	€20.00	
Variation Product, Test Attribute: Test, Test Attribute: Tes	Simple Product	Default	VARPROD-HOLBI-RED	€1,554.00	
Variation Product	Configurable Product	Default	VARPROD	€777.00	
LAST	Simple Product	Default	777	€50.00	

Also, go to Product Edit page > Associated Products and see your attribute: