



U s e r M a n u a l
D a t a L i n k o s C o m m e r c e
C o n n e c t o r f o r S a g e L i n e
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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 DataLink osCommerce connector. This will enable the transfer of products, categories and customer details from Sage to your web site, and the transfer of downloaded order information from web site to Sage Line 50. This guide assumes you are already familiar with Sage Line 50.

Compatibility: DataLink osCommerce Connector will work with the 'Accountant', 'Accountant Plus', and 'Financial Controller' versions of Sage Line 50 (versions 10,11,12 and 2007). Connector supports transfer of Stock, Invoices, Sales orders, and customer transactions but you will need an appropriate version of Sage Line 50 to use these features.

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 support@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

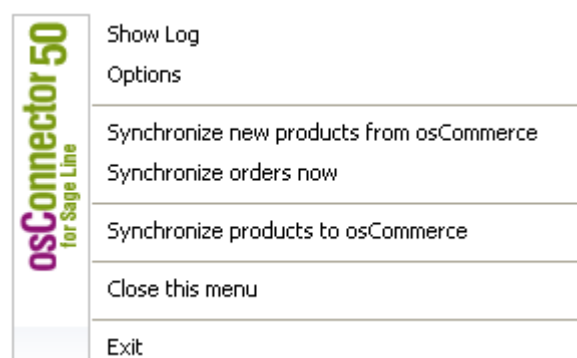
DataLink osCommerce Connector for Sage Line 50 can be used to synchronise an osCommerce-based online store with your Sage Line 50 software (Accountant, Accountant Plus or Financial Controller). This includes:

- Order and customer accounts download from osCommerce to Sage Line 50
- Product download from osCommerce to Sage Line 50
- Category and product upload from Sage Line 50 to osCommerce
- Order status upload from Sage Line 50 to osCommerce

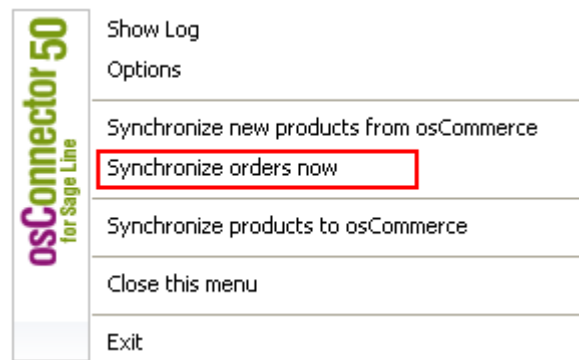
While running, the DataLink Sage Line 50 "sits" in the system tray in the bottom right corner of your screen as an icon.



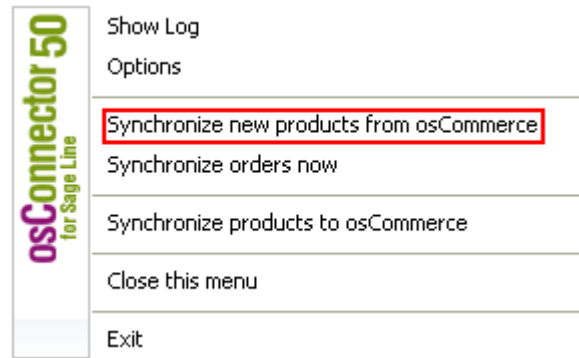
When you right-click on the icon, a popup menu (seen on the right) contains the following items:



“Synchronize orders now” downloads orders and/or invoices from osCommerce to Sage Line 50.



“Synchronize new products from osCommerce” downloads products from osCommerce to Sage Line 50. (This feature is useful for systems that have newly installed 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.)



Installation

The DataLink osCommerce Connector for Sage consists of two parts. The web part is pre installed to the osCommerce web site by DataLink UK team.

Please note the DataLink osCommerce connector must be installed onto the same computer as Sage Line 50.

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

Contained in the installation are the following documents and files:

- Setup.exe (install file for the DataLink osCommerce Connector for Sage Line 50)
- Licence 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 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 then double click on the “setup.exe” file. This will launch the “SET UP Wizard”.

(c) Follow the instructions in the “SET UP WIZARD” and then accept the “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 DataLink osCommerce Connector icon in the system tray or the icon on the computer Desktop.

Setup and configuration

Checking your Sage settings

There are a few things you need to check in your copy of Sage before starting to synchronise product and customer information using DataLink osCommerce Connector for Sage.

Go to Sage connector Options window and choose the Sage Line Connections tab in the left. There you can see Sage options you should configure before start working.

At first you must verify the Connection details because it's necessary for successful connection to your Sage database.

You must check if the Installation folder is correct.

Also you should define login and password which will be used to connect to your Sage database.

You should use the "Test connection" button to check the connection settings. If everything is ok you will see the «Test connection successful» message.

The screenshot shows a window titled 'Sage Details' with two sections: 'Connection Details' and 'System folders'. In 'Connection Details', there are fields for 'Installation Folder' (C:\Program Files\Sage Line50 11\), 'Login' (manager), and 'Password'. A 'Test Connection' button is to the right. In 'System folders', there is a 'BackUp folder' field (C:\Program Files\DataLinkSage11\BackUp\).

The following prompt will appear when DataLink osCommerce Connector connects to Sage Line 50 with a username and password that is currently in use by Sage. Press "Yes" to continue. Provided that there are no other current users using this username and password no data will be lost.



Checking your osCommerce settings

For successful work DataLink Sage connector requires access to your web site. Go to Options window and press the osCommerce icon on the left. There you can see FTP connection details you must configure before processing any further.

Please use Test connection button to check osCommerce settings. If everything is ok you will see the message «Test connection successful».

Checking your General settings

The DataLink Sage connector has some general options that make work with it easier. Go to Options window and choose the General tab on the left.

There you can see Schedule and Log options.

The DataLink Sage connector can work automatically. You can set days and times when connector will work using the Schedule options. Please see relevant section of this document.

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

From osCommerce to Sage

DataLink connector for Sage can perform two types of actions:

- Synchronise new products from osCommerce site
- Synchronise online orders to the Sage database

Connector updates product price, description, model, stock, pictures, and categories. Also connector creates customer accounts, and sales orders in the Sage.

Synchronise new products from osCommerce

Use the “Products from osC” button on the Options screen, or “Synchronise new products from osCommerce” item from the main menu.

Synchronise orders

To synchronise orders: note that only sales orders but not invoices can be created in Sage should there be not enough products in stock.

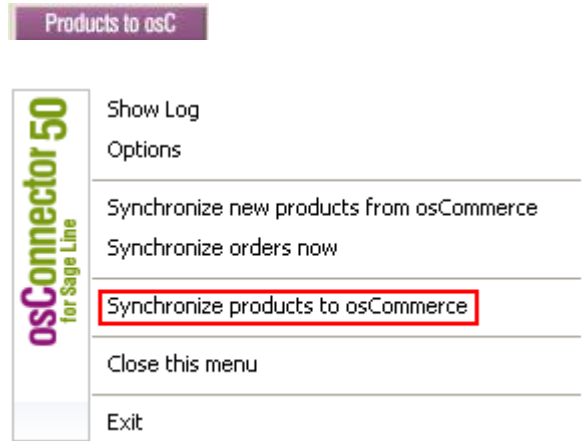
An online order can be added into Sage as a sales order or as an invoice. Also Invoice can be automatically set into the “Posted” status, and sales order – into the “Completed” status.

From Sage to osCommerce

Synchronise products to osCommerce

Press the "Products to Osc" button on the Options screen:

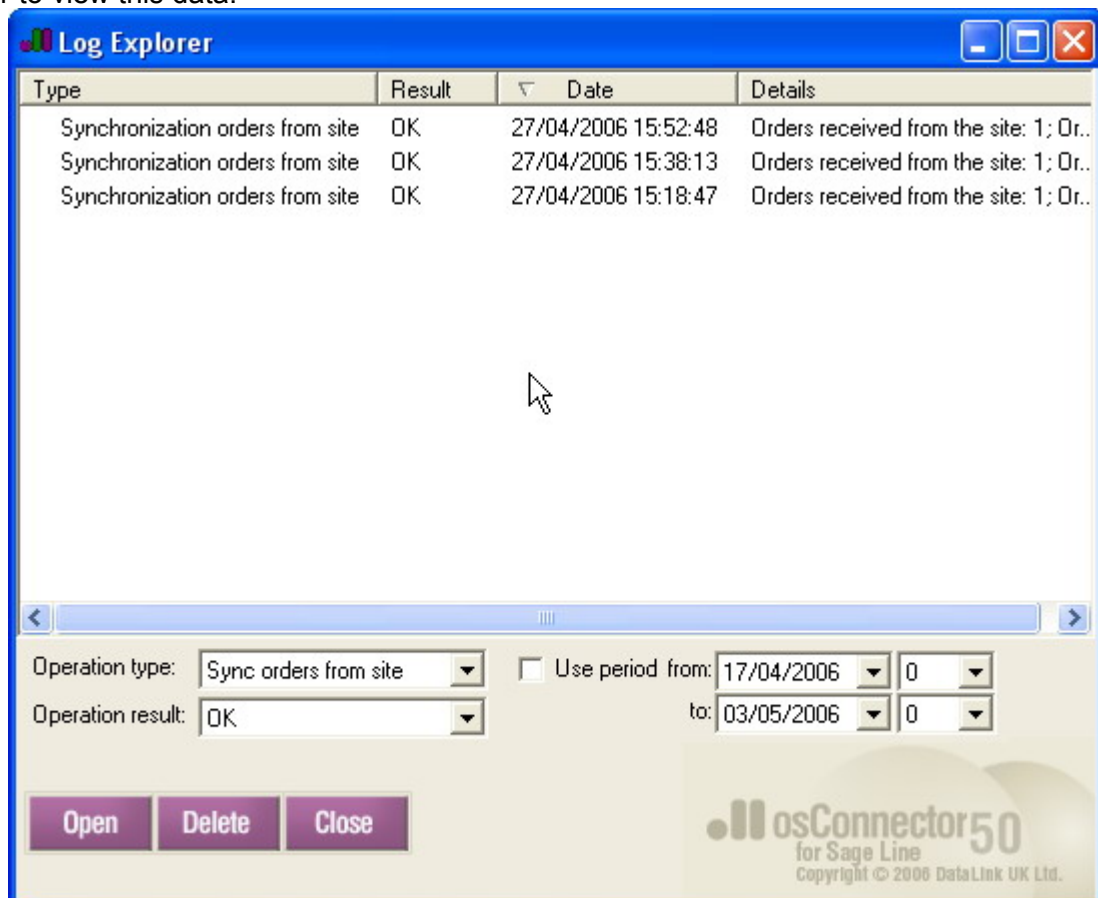
Or use this main menu item:



Options and settings

Log Explorer

The detailed information about all DataLink Sage connector's actions is stored into log file. You can use the Log Explorer to view this data.



Choose the «Show log» item of the tray icon's pop up menu to see the Log Explorer window.

All records have Type, Result, Date and Details fields.

The «Type» field contains the operation type. We have three types of operations here:

- Synchronise products from site
- Synchronise products from Sage to site
- Synchronise orders from site to Sage

The «Result» field contains the operation results. It can be either Ok, Error or Begin.

The «Date» field contains operation date and time.

The «Details» field contains additional information: how many products and orders were processed.

Also you can filter the log by operation type, operation result and date.

If you click on the column's header all data will be sorted in the alphabetical order.

For more detailed information about each action you can select an item from the list and press the “Open” button. Then you can see a separate window with log item details.

You can delete any log entry by using the “Delete” button.

Also you can close the Log Explorer window by clicking the “Close” button.

General settings

The «General»tab contains options that DataLink connector uses to make its easier for you to run it.

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

Then you set up time of day, when connector will run. If you want to run the connector only once a day, you can tick the “Every day” option and then set a time, for example 8:00.

Also you can synchronise your data several times during the day. In this case you should tick the option “Ongoing between” and then set a time range, for example, 8:00 and 17:00, and then set up an interval, for example, every 10 minutes. So with such settings the connector will be synchronising data every 10 minutes between 8:00 and 17:00 on the selected days of the week.

The screenshot shows the 'General options' dialog box with the following settings:

- Schedule:**
 - Days: Sunday (unchecked), Monday (checked), Tuesday (checked), Wednesday (checked), Thursday (checked), Friday (checked), Saturday (unchecked).
 - Frequency: Every Day at 08:00:00
 - Frequency: Ongoing between 08:00:00 and 17:00:00 every 10 minute(s)
- Run on Windows startup:**
- Log options:**
 - Store Log

Also in this section there is the “Run on Windows startup” option. If this option is ticked the connector will run on Windows startup. Please note in this case it doesn’t mean the synchronisation process will be started immediately. It will start on time accordingly to the Scheduler options set above.

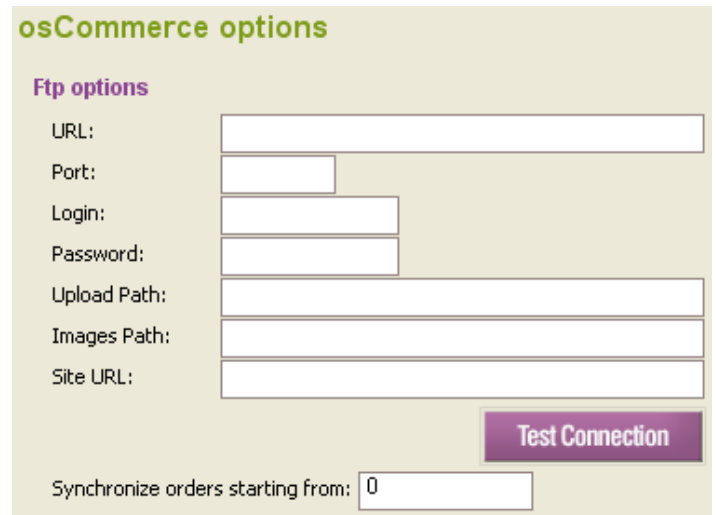
We strongly recommend you to tick the Store Log checkbox. It means detailed information about all connector’s activities will be stored in the log file. It will help us to solve any problems with connector’s work if any will take place.

osCommerce options

The “osCommerce options” tab has FTP options used by DataLink Connector for Sage to connect your web site.

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

If you don't want to synchronise all online orders you can set the Order ID in the “Synchronise orders starting from” field so only orders with greater IDs will be synchronised.



The screenshot shows the "osCommerce options" configuration page. It features a section titled "Ftp options" with several input fields: "URL:", "Port:", "Login:", "Password:", "Upload Path:", "Images Path:", and "Site URL:". A "Test Connection" button is located at the bottom right. Below the "Ftp options" section, there is a field labeled "Synchronize orders starting from:" with the value "0" entered.

Sage Line connection settings

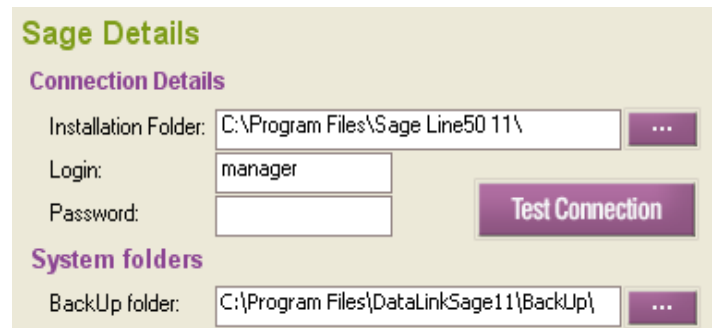
The “Sage Line connections” tab has the Sage Line 50 options used by DataLink Connector for Sage to connect your Sage database.

There are several sections here. The first section is “Connection details”. It consists of 3 fields: Installation folder, Login, Password and Test Connection button.

The Installation folder must contain the Sage Line 50 installation path. Please use the Browse button (on the right) to set the correct path.

In the Login and Password fields you should enter the login and password used to access the database.

The “System folders” section consists of only one field – BackUp folder. The software uses this folder to store temporary files. Default backup folder path is in the connector's installation directory, for example, c:/Program Files/DataLink/BackUp/



The screenshot shows the "Sage Details" configuration page. It features a section titled "Connection Details" with three input fields: "Installation Folder:" (containing "C:\Program Files\Sage Line50 11\"), "Login:" (containing "manager"), and "Password:". A "Test Connection" button is located to the right of the "Password" field. Below the "Connection Details" section, there is a section titled "System folders" with one input field: "BackUp folder:" (containing "C:\Program Files\DataLinkSage11\BackUp\").

The next section is "Tax management". All options in this section correspond with Sage order's fields. You can leave all fields empty, and the connector will use default values in this case.

Def. tax code field: use it to set up the default tax code for online orders. Default value is T1.

Def. Tax Rate: use it to set up the default tax rate. Default value is 17.5%

Def. zero tax rate: use it to set up the default zero tax rate. Default value is T0.

Def. A/C ref: use it if you want all online orders to be long to same customer's account.

Def. prod Dept: If you are using the departmental analysis facility you can assign products to a department for reporting purposes. Enter the department number here.

Def Department: If you wish to assign carriage fees to a department, enter it's number here.

Carriage N/C: use it to set up a specific nominal code for carriage fees.

Global N/C: If you wish to assign the entire net value of the invoice to just one nominal account, enter the nominal code in this box.

Customer N/C: use it to set up a specific nominal code for customers.

Bank Account(def): use it to set up the nominal code of the bank account that you want the online orders to be associated with.

Tax management

Def Tax Code: Def Zero Tax Code:

Def Tax Rate: Def A/C ref:

Def prod Dept: Def Department:

Carriage N/C: Global N/C:

Customer N/C: Bank Account(def):

Code	Rate(%)	UK	Europe	Registered for VAT	VAT charged

It is possible to add some additional tax codes for any special purposes. Press Add button and enter code name, rate, and some special options.

Add Tax

Tax Details

Code: Rate(%):

UK
 Registered for VAT

Europe
 VAT charged

Next section is "Orders options".

Online orders can be downloaded as a sales order and/or an invoices in Sage. Also you can tick *Set SOP completed* checkbox, and then all SOPs downloaded into Sage Line 50 will be marked as Completed.

The *Set Invoice Posted* checkbox works in the same way for invoices.

Orders options

Download online orders as: SOP Set SOP completed

Sage is master
 Invoice
 Set Invoice Posted

(product name, description, image, category)

Pay special attention to the *Sage is master* checkbox. With this option checked the Product Price, Name,

Description, Image and Category fields in Sage will remain unchanged even if changed on the website. With this option unchecked it works in the contrary way, and this product data remains unchanged on the website even if changed in Sage. Note, that stock levels are always taken from Sage. It make sense to disable stock subtraction feature on the website.