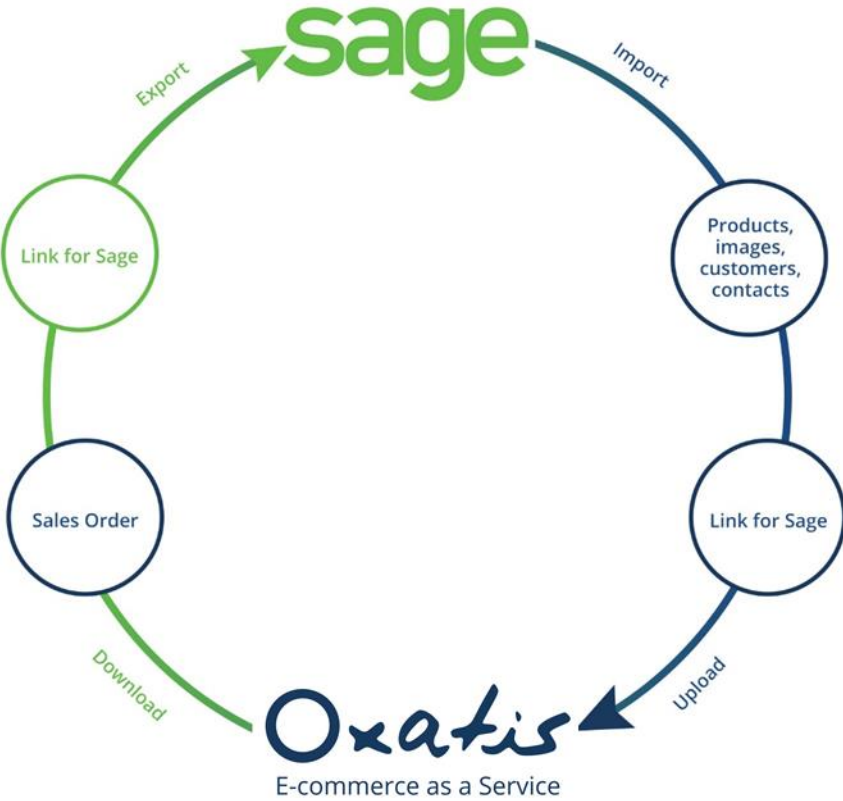


Oxatis DataPlug

For Windows Vista®, Windows® 7, Windows® 8 and Windows® 10

User Guide Link for Sage 200c 2018



Introduction

Welcome in documentation for Oxatis's Sage 200c 2018 connector.

The connector is the tool that will allow data to be exchanged between your website and your commercial management software Sage 200c.

The different features will be shown in the proper order of use, starting from configuration. Will be then presented the 3 wizards: article importation, customer importation, and order exportation. A last chapter will deal with most advanced features of the connector needing a particular attention, given the complexity or the number of the possible cases that could be met.

The first two chapters are dealing with a presentation of the new features and general information about the connector.

We wish you a good reading, a good discovery, and a good daily use of this tool.

Oxatis's collaborators are at your disposal to help you, especially through online support in your back-office.

Oxatis's team

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1. General information on the connector

- The DataPlug is the software dedicated to the importation of items, users and orders between an Oxatis e-commerce website and local files (.csv, .xml, .jpg...). The technology used to communicate between Oxatis's platform is called "WebServices".
- The Sage 200c connector is the connector proposed by Oxatis in order to automate the link between products, customers and orders directly with the Sage Database
- Installation softwares for the connectors and user guides are downloadable from the menu "Online Help" under the "?" menu in the back-office. They are also accessible from the following URL:
<http://www.oxatis.com/Help/HelpCenter.asp?ActionID=512&LangID=1>
- A setup and update guide is presented on the next chapter.



Advices are shown with this blue icon.



Elements that particularly require your attention are shown with this orange icon.

2. Setup, update and backup

This chapter presents how to install the DataPlug and the Connector step by step.

Installation

- To install Oxatis DataPlug, Microsoft .net Framework 4.0 is required.
- To activate the DataPlug Link for Sage 200c, the following is required:
 - ✓ Installation of Sage 200c 2018 – On Premise software with valid activation keys.
 - ✓ OR Installation of Sage 200c 2018 – Online software with valid activation keys.
- Launch the DataPlug's setup software « OxatisDataPlugSetupEN.msi »:
 - ✓ Accept the licence agreement
 - ✓ Select the install folder
 - ✓ Choose if the DataPlug has to be installed only on the current windows session ("Only me"), or every session on this computer.



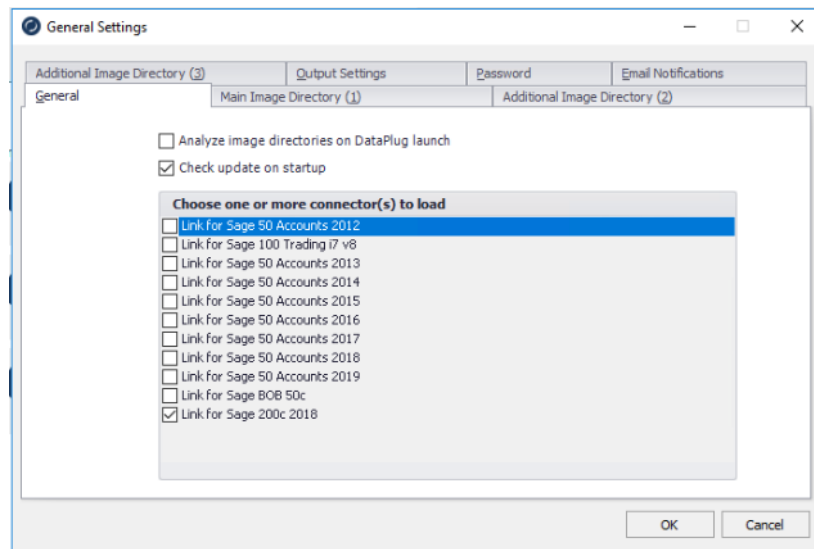
In order to share the database and change users more easily, it is preferable to choose:

- One remote desktop session with the setup set as "only me". This session can then be used alternatively by the users that have access to this session. It allows the DataPlug to continue to work in the background and continue the automation of data exchange 24/7 thanks to the scheduler, as long as the session is not stopped.
- One computer, shared with an installation for "everyone", allowing different Windows session to access the DataPlug on this computer.

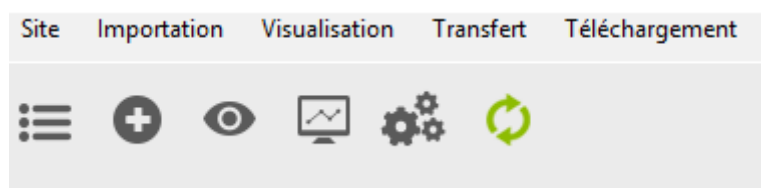
- A shortcut is automatically created on the desktop.
- During the first installation, it is advised to right click on the DataPlug to "open as an administrator", from the Windows program list or the program's folder (for example: C:\Program Files (x86)\Oxatis\DataPlug)

Update

- In “Tools > settings” of the DataPlug, an option allows you to check if an update is available:



- If the option is activated, an icon will appear, meaning that an update is available, or else it is still possible to check manually in “Tools > Check for Oxatis DataPlug Updates”:



- Clicking on the DataPlug icon will update the software automatically to the latest available version.



Once the new version is installed, it is advised to use the different importation wizards to check the different configuration parameters and discover the default values for the new available features. Selection and activation of the “task scheduler” is also advised.

Backup

It is important to periodically save a database from the menu “Tools > DataPlug database > Backup”.



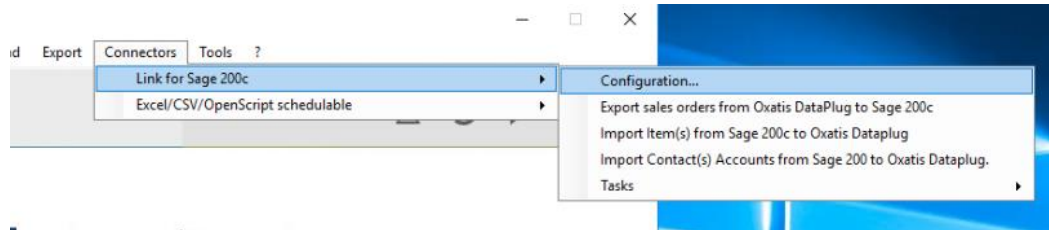
The folder C:\ProgramData\Oxatis contains the database, and the user’s preferences should also be included in the company’s data saving plan.

Note the different importation parameters for the Products and the users, as well as the exportation for orders. The update can make some fields change, due to the arrival of new features.

3. Configuration

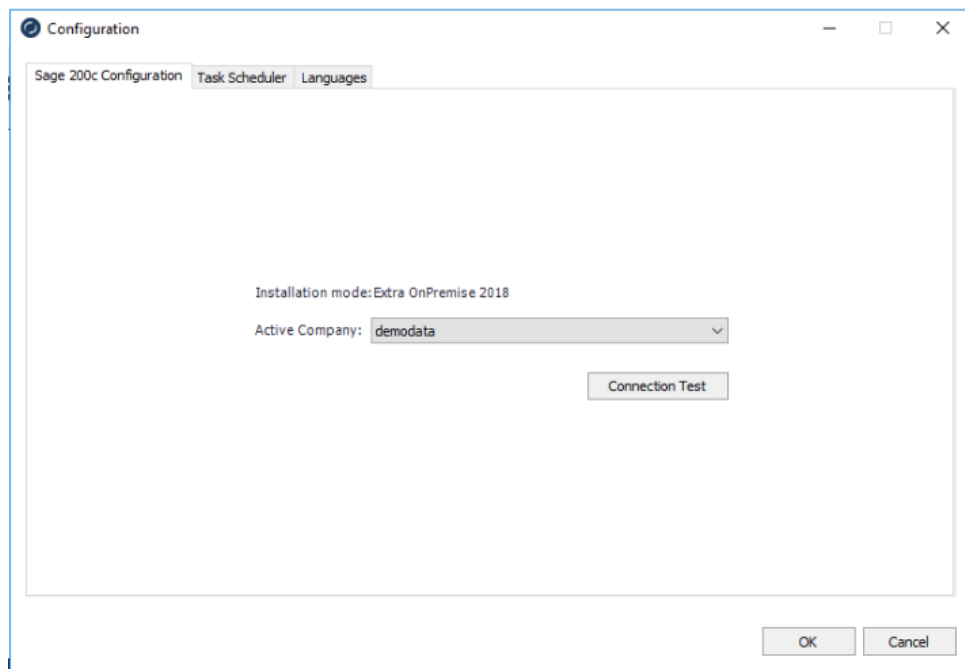
On Premise Version

In the DataPlug, select the **Connectors | Link for Sage 200c | Configuration** menu.



In the window below from the DataPlug, you will have to configure the following:

- Active company,



The "Connection Test" button checks the installation and the communication with the software: Sage 200c 2018- On Premise.

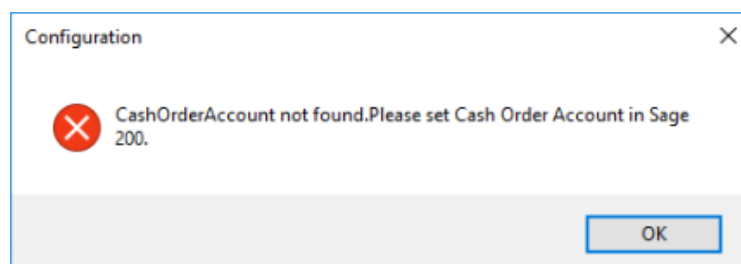


It is possible that the CashOrder Account is not filled in Sage 200c

In this case it is necessary to fill in the following field:

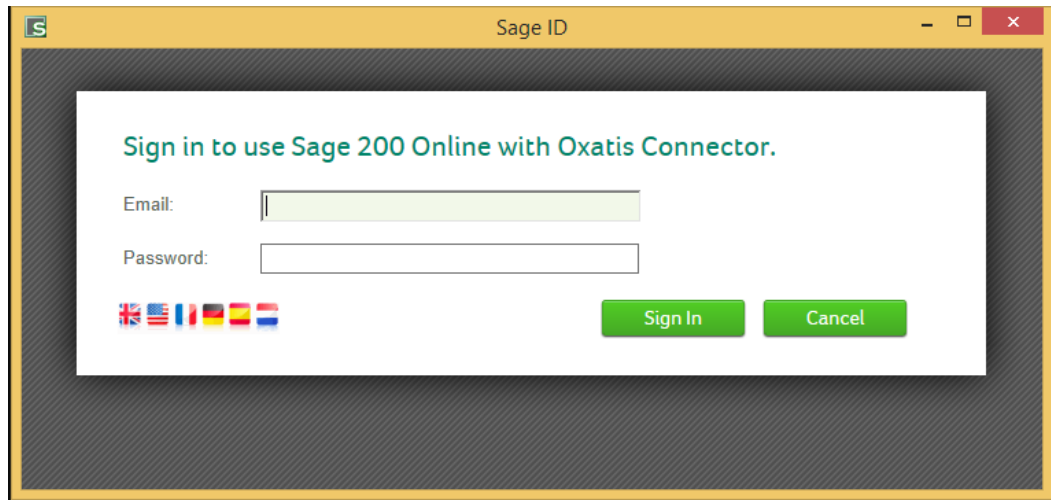
Sales Order Processing > SOP Utilities > System Set Up > SOP Settings > Default Accounts

Allow cash orders to be taken, using this account



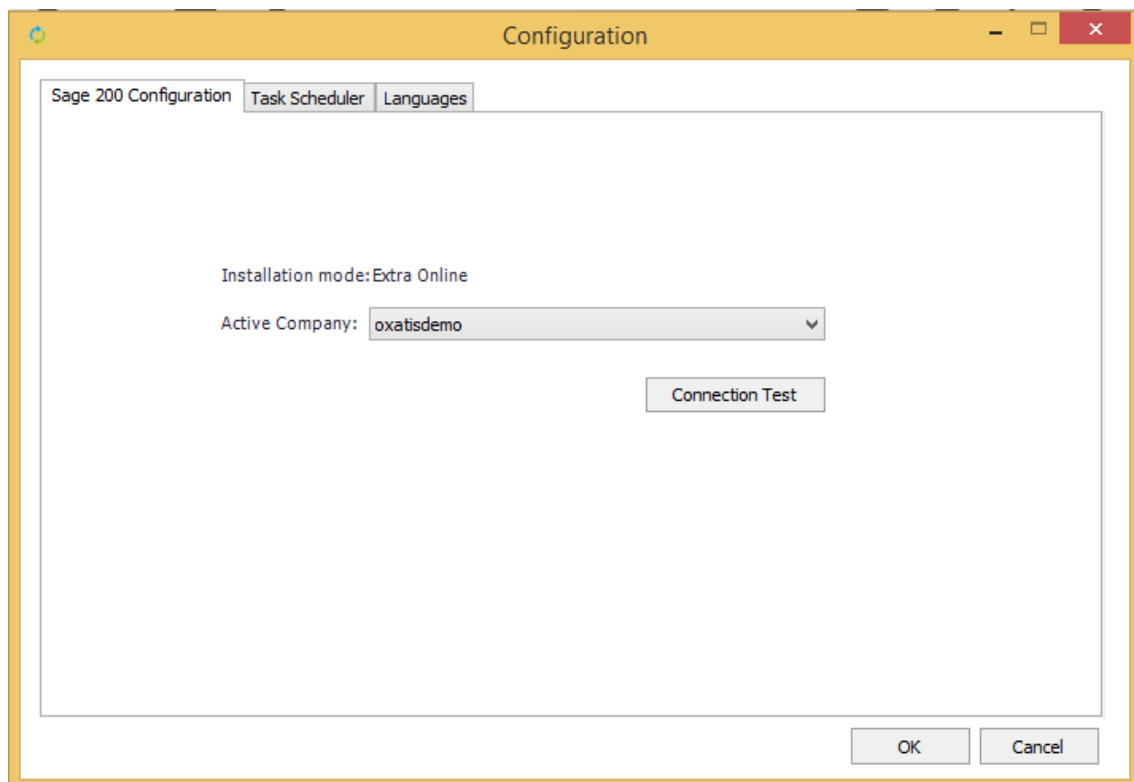
Online Version

In the DataPlug, select the **Connectors | Link for Sage 200c | Configuration** menu. Log in with your Sage 200c information.



In the window below back in the DataPlug, you will have to configure the following:

- Active company,



The "Connection Test" button checks the installation and the communication with the software: Sage 200c - Online.

4. Creating Products, Images and Customers in Sage 200c 2018

We have created various products and a customer for a new company in the Sage 200c 2018 On Premise software.

- Products

Below is a list of products created in Sage 200c 2018.

Code	Name	Sales Price	Actual Quantity	Free Stock Quantity
ABBuiltIn/15/0/2	AB Built-In Cookers Single-Oven/300mm/White	199.98000	59.00000	54.00000
ABBuiltIn/15/1/2	AB Built-In Cookers Single-Oven/600mm/White	299.98000	49.00000	31.00000
ABBuiltIn/15/20/2	AB Built-In Cookers Single-Oven/500mm/White	299.98000	42.00000	32.00000
ABBuiltIn/15/21/2	AB Built-In Cookers Single-Oven/550mm/White	299.98000	54.00000	45.00000
ABBuiltIn/16/0/2	AB Built-In Cookers Double-Oven/300mm/White	299.98000	37.00000	17.00000
ABBuiltIn/16/1/2	AB Built-In Cookers Double-Oven/600mm/White	299.98000	44.00000	40.00000
ABBuiltIn/16/20/2	AB Built-In Cookers Double-Oven/500mm/White	299.98000	58.00000	38.00000
ABBuiltIn/16/21/2	AB Built-In Cookers Double-Oven/550mm/White	299.98000	47.00000	41.00000
ABCookHoods/22/2	AB Cooker Hoods Chimney/White	30.00000	31.00000	13.00000
ABCookHoods/23/2	AB Cooker Hoods Standard/White	30.00000	32.00000	24.00000
ABFSE/12/0/2	AB Freestanding Electric 2-Ring/300mm/White	160.00000	46.00000	40.00000
ABFSE/12/1/2	AB Freestanding Electric 2-Ring/600mm/White	160.00000	40.00000	35.00000
ABFSE/12/20/2	AB Freestanding Electric 2-Ring/500mm/White	160.00000	44.00000	36.00000
ABFSE/12/21/2	AB Freestanding Electric 2-Ring/550mm/White	160.00000	50.00000	40.00000
ABFSE/13/0/2	AB Freestanding Electric 3-Ring/300mm/White	160.00000	44.00000	38.00000
ABFSE/13/1/2	AB Freestanding Electric 3-Ring/600mm/White	160.00000	58.00000	40.00000
ABFSE/13/20/2	AB Freestanding Electric 3-Ring/500mm/White	160.00000	59.00000	50.00000
ABFSE/13/21/2	AB Freestanding Electric 3-Ring/550mm/White	160.00000	54.00000	46.00000
ABFSE/14/0/2	AB Freestanding Electric 5-Ring/300mm/White	160.00000	44.00000	40.00000
ABFSE/14/1/2	AB Freestanding Electric 5-Ring/600mm/White	160.00000	51.00000	46.00000

Below is an example of the details of the product "COOK/CERM/HOB" in Sage 200c 2018 On Premise:

Amend Stock Item Details
- □ ×

Stock Item

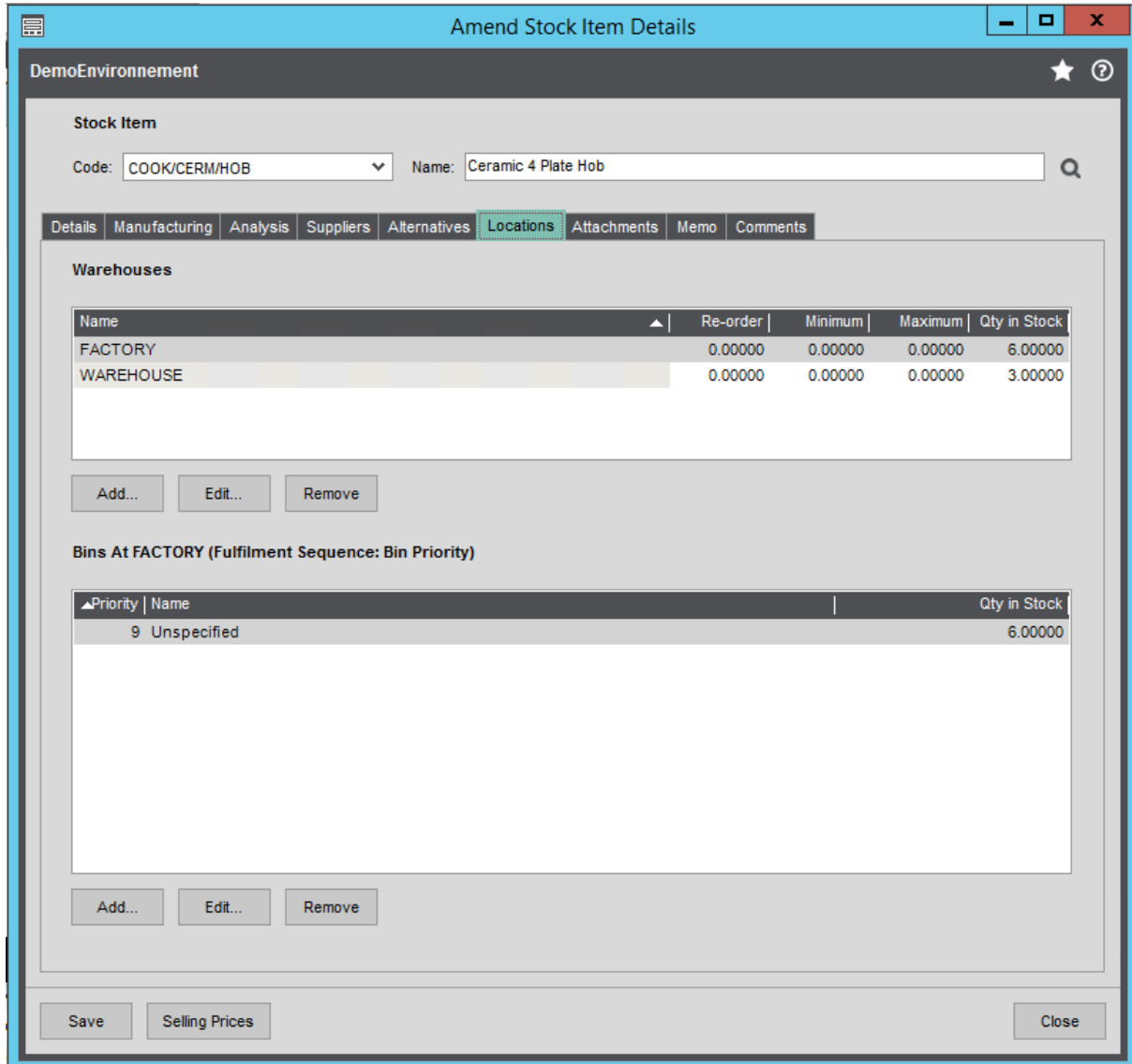
Code: COOK/CERM/HOB Name: Ceramic 4 Plate Hob 🔍

Details
Manufacturing
Analysis
Suppliers
Alternatives
Locations
Attachments
Memo
Comments

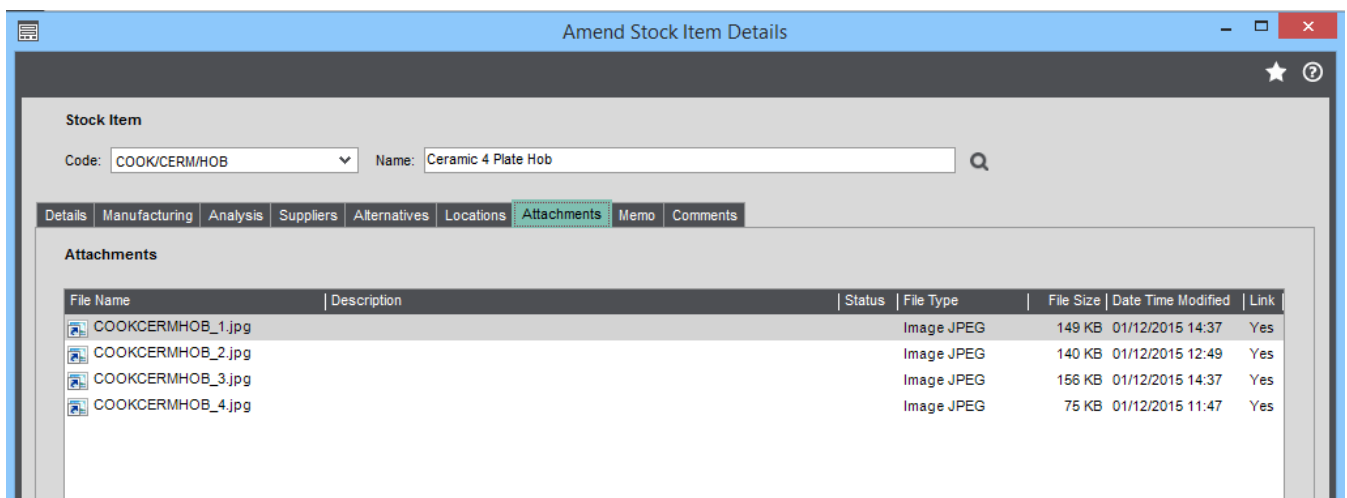
<p>Item Classification</p> <p>Product group: COOKING ▼</p> <p>Product type: Stock</p> <p>Trading Settings</p> <p>Stock unit: Each ▼</p> <p>VAT rate: 1 - Std Rate ▼</p> <p>Label Printing Options</p> <p>Label printing option: Label not required ▼</p> <p>Costing Method</p> <p>Cost method: Standard</p> <p>Item Description</p> <div style="border: 1px solid #ccc; height: 40px; width: 100%; margin-top: 5px;"></div> <p><input type="checkbox"/> Use item description on orders and invoices</p>	<p>Item Status</p> <p>Current status: Active ▼</p> <p>Inactivation date: 📅</p> <p>Manufacturer Details</p> <p>Manufacturer: </p> <p>Part no: 4-HOB-443333</p> <p>Sales Orders</p> <p>Allow sales orders: <input checked="" type="checkbox"/></p> <p>Standard cost price: £ 89.00000</p> <p>BOM Details</p> <p><input checked="" type="radio"/> Component</p> <p><input type="radio"/> Built item</p> <p><input type="radio"/> Phantom item</p> <p><input type="radio"/> Built/Bought</p> <p> ▼</p>
--	---

Save
Selling Prices
Close

Below is an example of the locations for the product "COOK/CERM/HOB" in Sage 200c 2018 On Premise:



Below is an example of the attachments for the product "COOK/CERM/HOB" in Sage 200c 2018 On Premise:
It is possible to attach images on a product (format: png, jpg, bmp and gif)



- Customers

We have also created a customer with the following content in Sage 200c 2018 On Premise:

Company customer details:

Customer Enquiry for Abbey Retail Ltdlkjk

DemoEnvironnement

Customer Selection

Code: ABB001
Short name: Abbey
Postcode: EH12 1WE

Current Status

Credit limit: £ 100000.00
Balance: £ 16260.69

Company | Contacts | General | Stationery | Terms | Credit | Analysis Codes | Aged Balances £ | Turnover £ | Turnover By Year £ | Attachments | Memo *

Company Details

Address: 16 Church Lane
Lochside
Edinburgh
Midlothian
EH12 1WE

Telephone: 44 0131 621 9900
Fax: 44 0131 621 9855
Web site: www.abbeyretail.com.uk
Contact: Hayley Bass

Contact Details

Telephone: 44 0131 621 9900 More...
Mobile: More...
Fax: 44 0131 621 9855 More...
E-mail: info@abbeyretail.com.uk More...
Web site: www.abbeyretail.com.uk More...

Transaction Enquiry View Orders Close

Main customer details:

Customer Enquiry for Abbey Retail Ltdlkjk

DemoEnvironnement

Customer Selection

Code: ABB001
Short name: Abbey
Postcode: EH12 1WE

Current Status

Credit limit: £ 100000.00
Balance: £ 16260.69

Company | **Contacts** | General | Stationery | Terms | Credit | Analysis Codes | Aged Balances £ | Turnover £ | Turnover By Year £ | Attachments | Memo *

Contacts

Default	Name	Role	Preferred	Telephone	E-mail
Yes	Hayley Bass	Account	Yes	44 0131 621 9900	info@abbeyretail.com.uk
	Hayley Bass	SendStatementTo	Yes	44 0131 621 9900	info@abbeyretail.com.uk
	Ian Mowbray			44 0131 621 9901	Ian.Mowbray@AbbeyRetail.co.uk
	Susan Whiffin			44 0131 621 9902	SusanWhiffin@abbeyretail.com.uk
	Piers Thom			44 0131 621 9903	PiersThom@abbeyretail.com.uk

Details...

Transaction Enquiry View Orders Close

Customer delivery address:

Customer Delivery Addresses

DemoEnvironnement

Customer Selection

Code: ABB001
Short name: Abbey
Postcode: EH12 1WE
Name: Abbey Retail Ltdkijk

Customer Delivery Addresses

Description	Default
1	
2	
3	

Add... Edit... Delete Set as Default

Close

Edit Delivery Address For: ABB001

DemoEnvironnement

Delivery Address Details

Description: [i]
Postal name: Abbey Retail Ltd
Address Line 1: Warehouse
Address Line 2: Unit 15
Address Line 3: Wayside Industrial Estate
Address Line 4: Farmers Road, Edinburgh
City:
County:
Postcode: EH12 6HY
Country:
Contact:
Telephone:
Fax:
E-mail:

VAT Details

VAT number: 612 5749 32
VAT code: 1 - Std Rate
Country code: GB - Great Britain

OK Cancel



It is possible to unlock the "Country" and "County" fields. For this, it is needed to check the box "Use segmented addresses" in the menu: "Configuration Settings > Accounting system > System settings"

5. Importing Products, Images and Categories from Sage to DataPlug

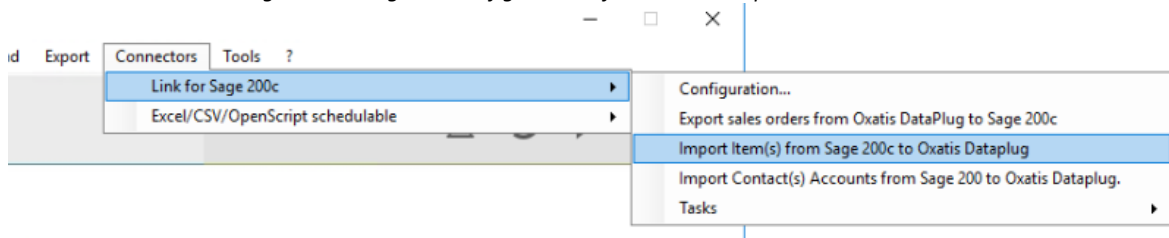
- The Link for Sage 200c 2018 allows you to import products that meet the following criteria to your website:
 - ✓ “Publish to web” is set to true (in “Web” tab of product file in Sage 200c 2018)
 - ✓ The used VAT rate exists on the Oxatis website
 - ✓ Product code length is less than or equal to 20 characters
- Below are the Oxatis fields that are automatically mapped by the Link for Sage 200c 2018 On Premise:

Oxatis	Sage 200c 2018 On Premise
Code	Code
Name	Name
Quantity in Stock	In Stock or Free stock
VAT Rate	Tax value associated to tax code
Description	Item description
Price 1	Sales Price
Weight	Weight Note: weight in website will be expressed in grams
Zoom Image	Image (Web Defaults Custom Fields)
Main Image	Image (Web Defaults Custom Fields)
Thumbnail image	Image (Web Defaults Custom Fields)
Category 1	Product group
Cost	Unit Cost Price

- Importing products to the DataPlug:

Click on the following menu in the DataPlug: **Connectors | Link for Sage 200c | Import Items from Sage 200c to DataPlug.**

You will then be guided through the configuration of the data to import.



1st step: You can select:

- A warehouse.
- Possibility to choose between **Free Stock** or **In Stock**. Both terms are defined as follows in the Sage documentation:
 - **Free stock=**
In stock – Allocated stock
 - **In stock=**
Allocated stock + Free Stock
- For BOM products, it is possible to display the composed product and associated quantity.

Import Items from Sage 200 [EN]

Import Items from Sage 200

Company: DemoEnvironment

Warehouse Selection

Warehouse: WAREHOUSE

Quantity in Stock management:

Free stock In Stock

Bill of Materials management

Append BOM component names and quantities in Oxatis item description

Append BOM component names and quantities in Oxatis item long description

< Back Next > Cancel



Consequently, the “Bill of material products” will be displayed as simple products in the Oxatis Website.

2nd step: You can select:

- A range of products groups.
- A range of item codes.
- A range of suppliers
- You can decide to ignore Items with an "Inactive" state
- You can decide to ignore items whose stock is unavailable

Import Items from Sage 200 [EN]

Item Filters Configuration

You can import desired items by checking and filling product and or supplier group and or item code interval

Product Groups Selection

From: Accessories

To: Worktops Unfinished

Item Codes Selection

From:

To:

Item Status

Ignore all inactive items

Ignore Items whose stock is unavailable

Supplier Groups Selection

From: AB Cookers

To: Xavier plc

< Back Next > Cancel

3rd step: For each of the 10 Oxatis prices of the item, you can define the matching price in Sage 200c. It is not possible to import prices in another currency than the one defined for the Oxatis website.

Item prices mapping
Mapping (Oxatis) prices with (Sage) price band.

Prices	Strikethrough prices
<input checked="" type="checkbox"/> Price 1 Standard	<input type="checkbox"/> Strikethrough Price 1 Standard
<input checked="" type="checkbox"/> Price 2 Selling Band 2	<input type="checkbox"/> Strikethrough Price 2 Standard
<input checked="" type="checkbox"/> Price 3 Selling Band 3	<input type="checkbox"/> Strikethrough Price 3 Standard
<input checked="" type="checkbox"/> Price 4 Selling Band 4	<input type="checkbox"/> Strikethrough Price 4 Standard
<input checked="" type="checkbox"/> Price 5 Selling Band 5	<input type="checkbox"/> Strikethrough Price 5 Standard
<input type="checkbox"/> Price 6 Standard	<input type="checkbox"/> Strikethrough Price 6 Standard
<input type="checkbox"/> Price 7 Standard	<input type="checkbox"/> Strikethrough Price 7 Standard
<input type="checkbox"/> Price 8 Standard	<input type="checkbox"/> Strikethrough Price 8 Standard
<input type="checkbox"/> Price 9 Standard	<input type="checkbox"/> Strikethrough Price 9 Standard
<input type="checkbox"/> Price 10 Standard	<input type="checkbox"/> Strikethrough Price 10 Standard

< Back Next > Cancel

4th step (exclusive to the EXTRA version): Options:

In order to import the options, you need to first check the box allowing their activation. 4 fields are available:

Oxatis Parent Item Code: This field defines which "search category" holds the code of the parent article for the products with options.

Oxatis 1st Option: Defines the prefix allowing the connector to get the first option. (Ex: OX_Option1_Electric)

Oxatis 2st Option: Defines the prefix allowing the connector to get the second option

Oxatis 3st Option: Defines the prefix allowing the connector to get the third option

Import Items from Sage 200 [EN]

Items with options settings

Search Item Values (Sage) can be used to handle items with options on Oxatis.

This case is illustrated from the Sage 200 demo database:
"COOK/CERM/HOB" and "COOK/DOUBLE OVEN" are defined with 2 "Item Search Values": "Electrical" and "Fuel". If you would like to create on Oxatis site an item with variations ("Electrical" and "Fuel"), you should use the "Item Search Values" in Sage 200.
To do this, you must for each one of the 2 items mentioned above:

- Create a new entry in the "Search Categories" named for example "OX_PARENT_ITEM" having a "Search Value": "COOK"
- Modify their existing "Search Category" entries by prefixing:
 - o The first one with e.g. "OX_OPTION1_" which gives "OX_OPTION1_Electrical".
 - o The second one with e.g. "OX_OPTION2_" which gives "OX_OPTION2_Fuel".

To handle this, you should do in the fields below:

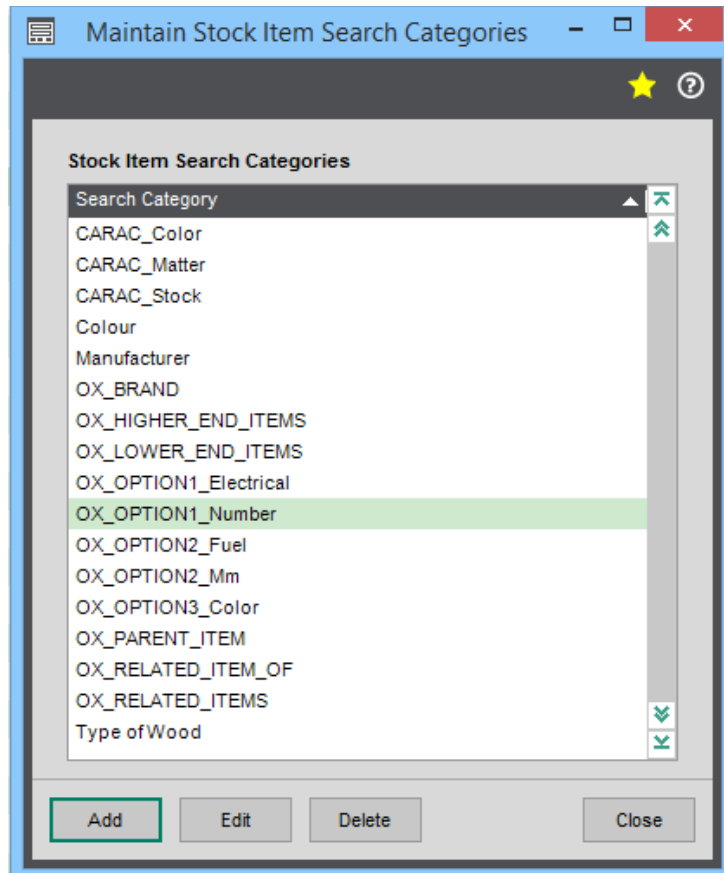
Import Items with Options

Oxatis Parent Item Code: <input type="text" value="OX_PARENT_ITEM"/>	Oxatis 2nd Option: <input type="text" value="OX_OPTION2_"/>
Oxatis 1st Option: <input type="text" value="OX_OPTION1_"/>	Oxatis 3rd Option: <input type="text" value="OX_OPTION3_"/>

< Précédent Suivant > Cancel

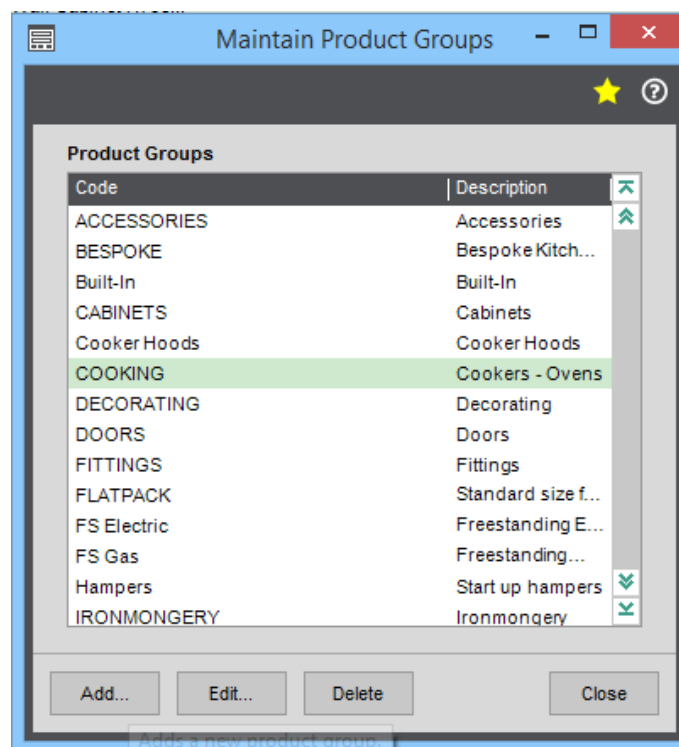
Creating Search Categories in Sage 200c

Creation of Search categories can be made in the “Stock Control > Stock Maintenance > Search Categories” menu.

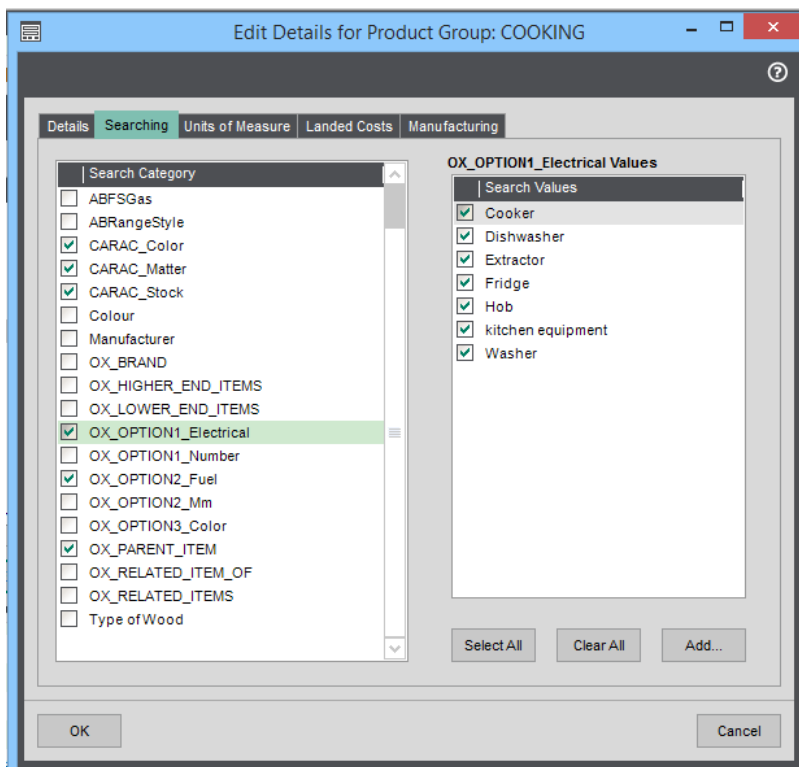


It is necessary to create as many Search Categories as your website will have options.

Once the creation of the search categories has been done, it is necessary to connect them to the product groups. This action can be made in “Stock Control > Stock Maintenance > Product Groups”. You need to edit the product group to add the search category.



In the "searching" tab, add every search category you need to link to this article.

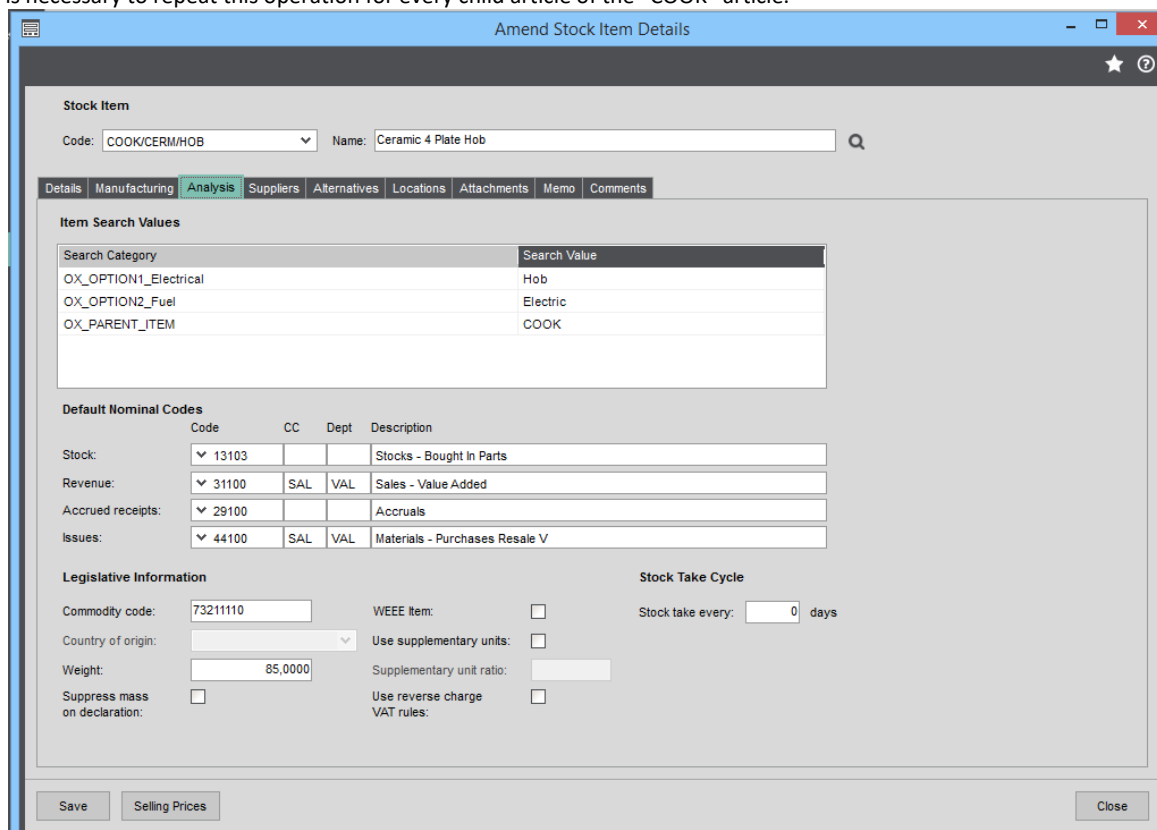


On the article view, Analysis tab, it is now possible to fill the search values for the specific product.

On this example, for the child product "COOK/CERM/HOB", there are 2 options:

- Options1_Fuel, which has the value "electric"
- Options2_Electrical, which has the value "hob"
- The parent product of this article will be "COOK"

It is necessary to repeat this operation for every child article of the "COOK" article.



5th step (exclusive to the EXTRA version): Three categories are available to associate product categories (Oxatis). You can:

- Create an Oxatis tree-structure for the categories from the “Product Group” and search categories.
- Find the category name (Sage) inside the category tree (Oxatis)

Example: If an article has a “Hob” category (on Sage) and is in a subcategory “Cooking/Hob” on your Oxatis website, you can check this box and the product will be put in the corresponding Oxatis’s subcategory.

It is possible to skip this step, in order to associate later the 3 products categories with other information from the article view.

Import Items from Sage 200 [EN]

Item categories mapping

For each Oxatis item category, a category tree can be created a category tree could be created from the mapping below.

First Item Category

C_OX_CATEGORY1 ▼ C_OX_CATEGORY2 ▼ [] ▼ [] ▼

Find the category name (Sage) inside the categories tree (Oxatis)

Second Item Category

ProductGroup ▼ [] ▼ [] ▼ [] ▼

Find the category name (Sage) inside the categories tree (Oxatis)

Third Item Category

[] ▼ [] ▼ [] ▼ [] ▼

Find the category name (Sage) inside the categories tree (Oxatis)

< Back Next > Cancel

6th step (Exclusive to the Extra version): - Oxatis's website allows the final customer to filter the products with some technical characteristics. This navigation is also made possible thanks to some information on the Product view.

In order to import them, it is necessary to check the box "Import characteristics".

- For every search category (Sage 200c), it is possible to associate one or more characteristic form your Oxatis website, which will be shown on the Article level.
- It is possible to define if the characteristics values have to be translated on the website.

For example, for a characteristic "colour", and a value "red", it will be necessary to translate the value "Red" for the different languages your website uses.

The translation has to be made in the "Commerce > Option types" menu. Choose the correct characteristic, modify it and change the values in the "Edition language" column.



For the value of the characteristics that have to be translated, it is necessary for the characteristic to have already been imported in the site's main language.



The "public name of an option type" can be translated without problem, as the DataPlug uses mainly the internal name of the characteristic.

Sage item search category	Associate with an Oxatis characteristic	The characteristic requires a translation of the Oxatis site
ABCookerHood	<input type="checkbox"/>	<input type="checkbox"/>
ABFSElectric	<input type="checkbox"/>	<input type="checkbox"/>
ABFSGas	<input type="checkbox"/>	<input type="checkbox"/>
ABRangeStyle	<input type="checkbox"/>	<input type="checkbox"/>
CARAC_Color	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CARAC_Matter	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CARAC_Stock	<input checked="" type="checkbox"/>	<input type="checkbox"/>
OX_RELATED_ITEM_OF	<input type="checkbox"/>	<input type="checkbox"/>
OX_RELATED_ITEMS	<input type="checkbox"/>	<input type="checkbox"/>
OX_LOWER_END_ITEMS	<input type="checkbox"/>	<input type="checkbox"/>
OX_HIGHER_END_ITEMS	<input type="checkbox"/>	<input type="checkbox"/>

< Back Next > Cancel



It is possible to import several characteristics per search category (Sage). In order to achieve this, you only need to separate every characteristic's value by the separator defined during the product transfer. By default, it is the semicolon ";". If a value is null, it won't be imported.

Characteristic values:

;

Characteristic 1 = value 1 ; value 2 ; value 3 |
Characteristic 2 = value 4 ; value 5 ; value 6 | ...

7th step: In this step, all the fields of the Oxatis item - that are not automatically associated by the connector - are proposed in order to be associated manually to Sage 200c fields and Search categories.

- □ ×

Import Items from Sage 200 [EN]

Columns mapping

Define column mapping and their default values.

Oxatis fields	Sage fields	Default value
Strikethrough Price 1 VAT Excluded		▼
Strikethrough Price 1 VAT Included		▼
Eco-Tax (Ind. VAT)		▼
Detailed description		▼
Second category name		▼
Third category name		▼
Product family	ProductGroup	▼
Brand name		▼
Display the fact that an item is in stock		▼
Display stock level		▼
Show this item even if unavailable		▼
Propose this item for sale even if unavailable		▼
Unavailability reason		▼
Show days to ship		▼

< Back
Next >
Cancel

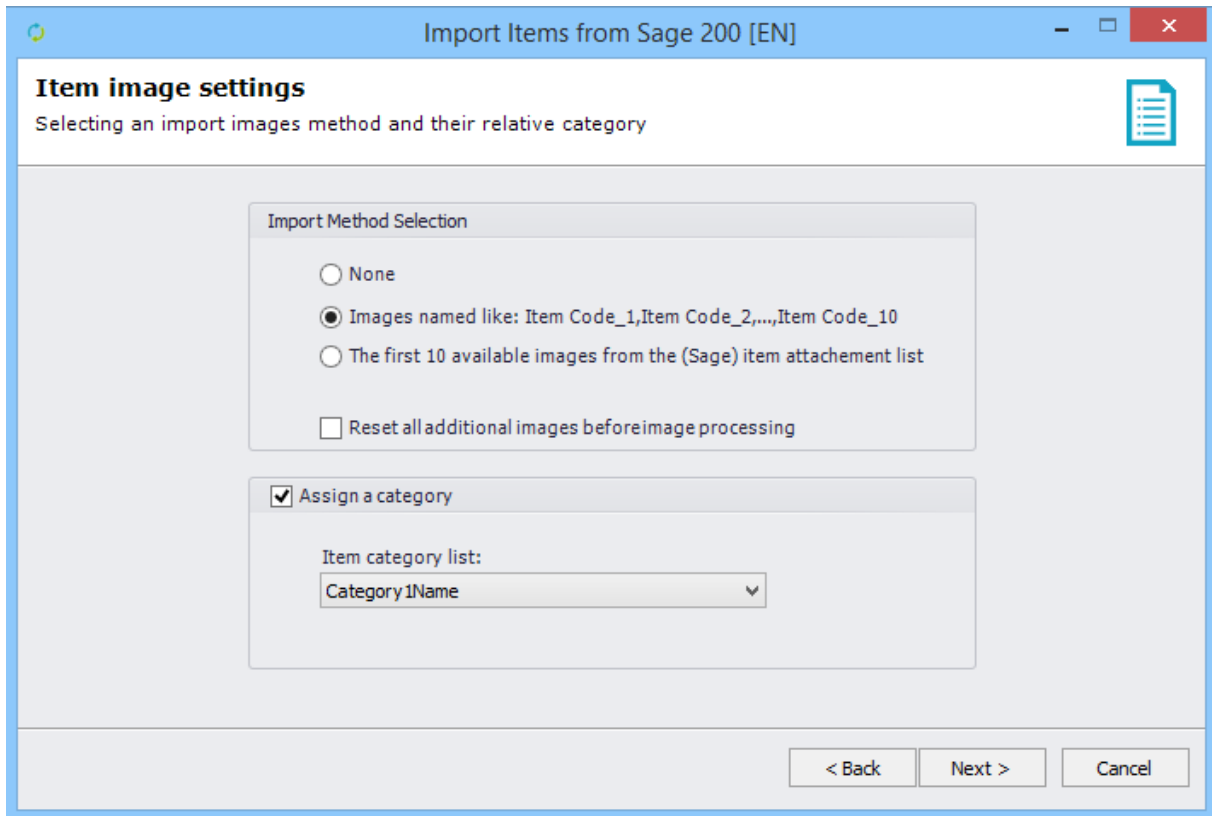
8th step: Images attached to every article in Sage 200c (attachments tab) can be sent to your Oxatis website

Several possibilities:

- No image importation
- Images named like: "Item Code_1, Item Code_2..., Item Code_10"
- The first 10 available images from the (Sage) item attachment list

It is also possible to reset all additional images already attached to an article.

The box "Assign a category" will group the imported images in an image category.



The screenshot shows a window titled "Import Items from Sage 200 [EN]". Inside, there is a section titled "Item image settings" with the subtitle "Selecting an import images method and their relative category". The settings are organized into two main panels. The first panel, "Import Method Selection", contains three radio button options: "None", "Images named like: Item Code_1,Item Code_2,...,Item Code_10" (which is selected), and "The first 10 available images from the (Sage) item attachment list". Below these is a checkbox labeled "Reset all additional images before image processing" which is currently unchecked. The second panel, "Assign a category", has a checked checkbox. Below it is a dropdown menu labeled "Item category list:" with "Category1Name" selected. At the bottom right of the window are three buttons: "< Back", "Next >", and "Cancel".

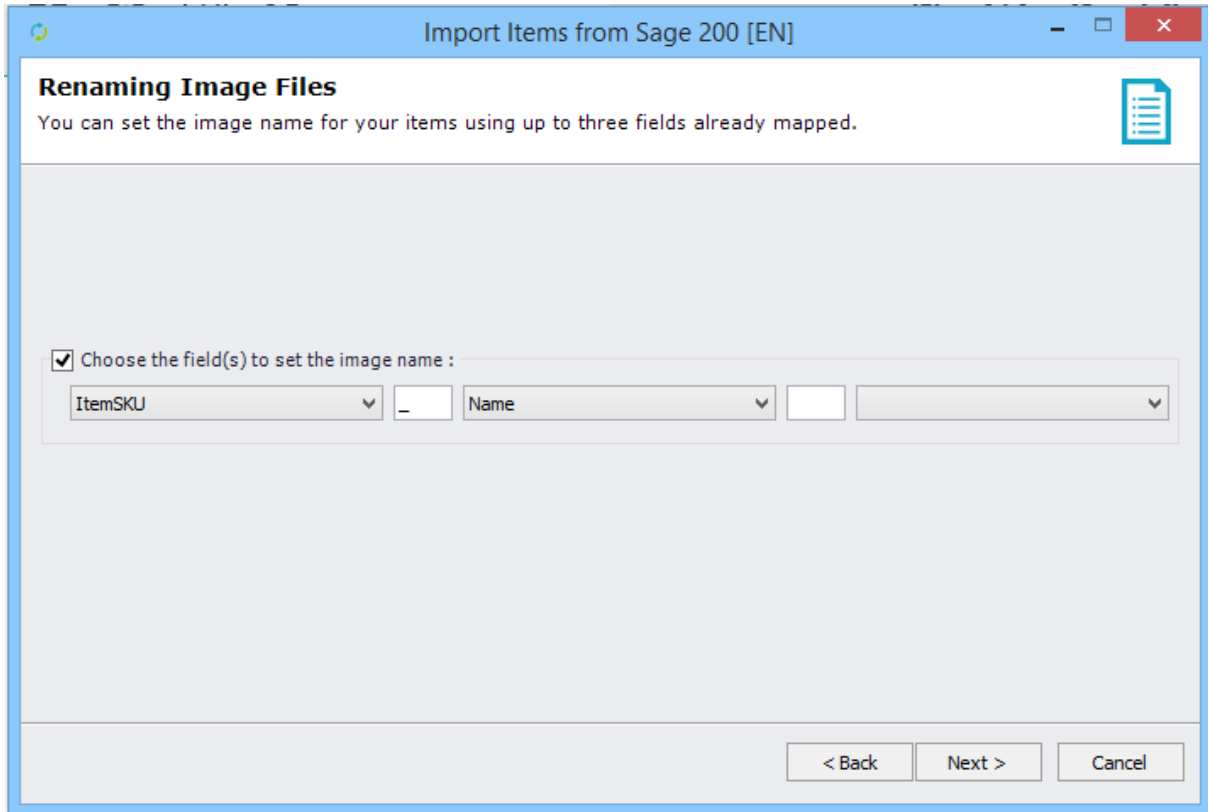


With the option "Image Named like: Item Code_1, Item Code_10", the "item Code_1" image will be defined as main image. Consequently, it is necessary to have an image marked as "_1"

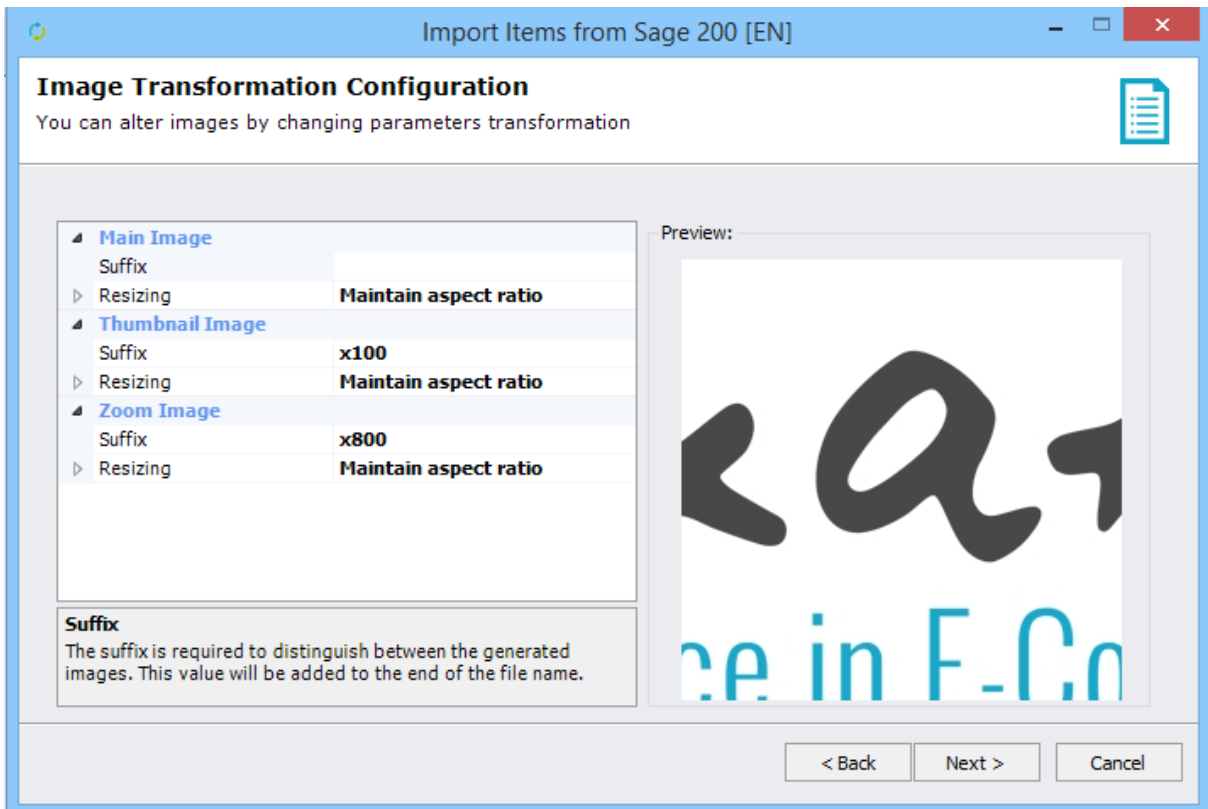


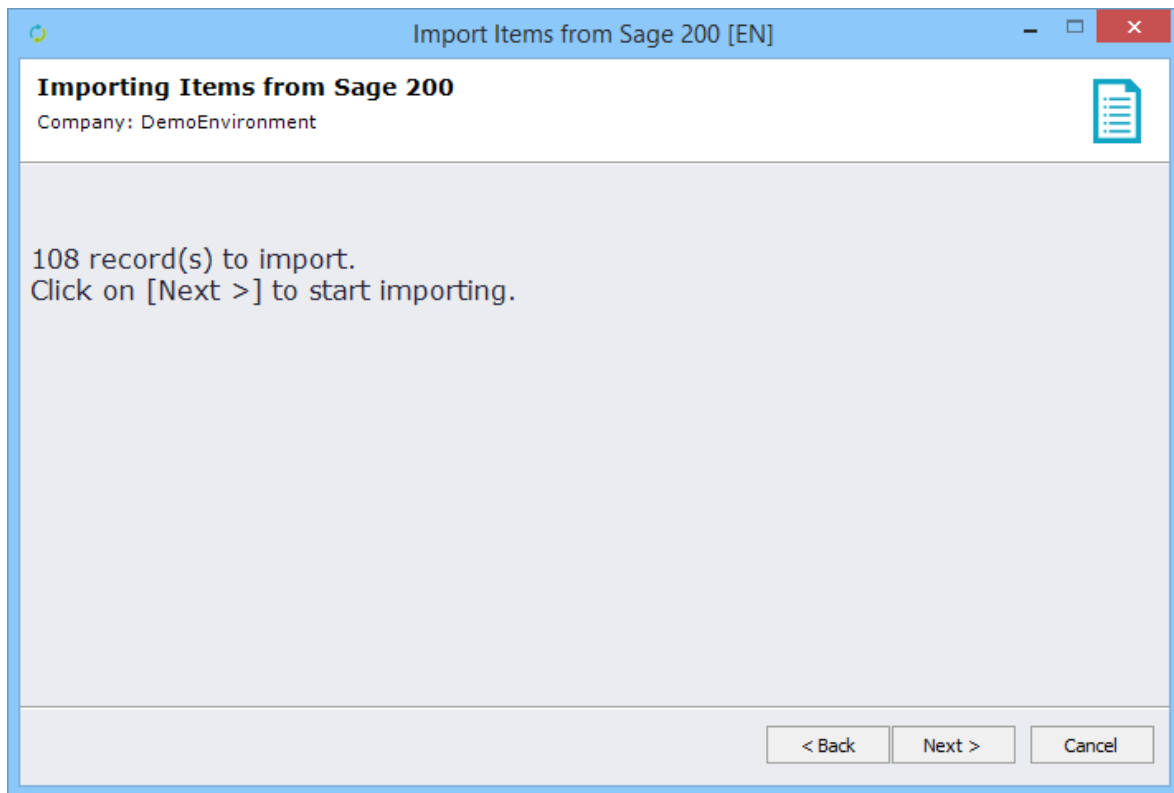
To have the image import wizard it is necessary that the first item to be imported have images

9th step: It is possible to rename images.

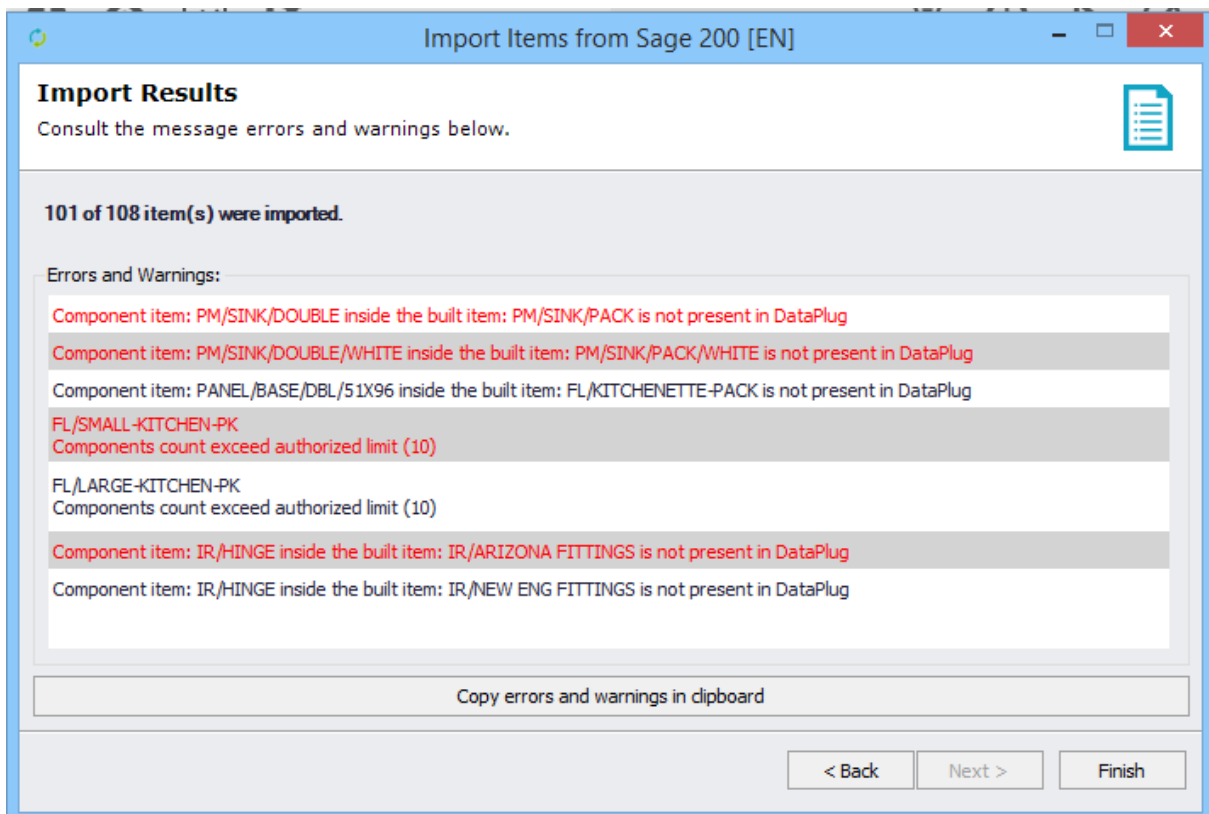


10th step: The image format can be kept or automatically adapted to the site's dimensions. If its quality is high enough, the same image can be used to generate the main image, thumbnail image and zoom image at once.





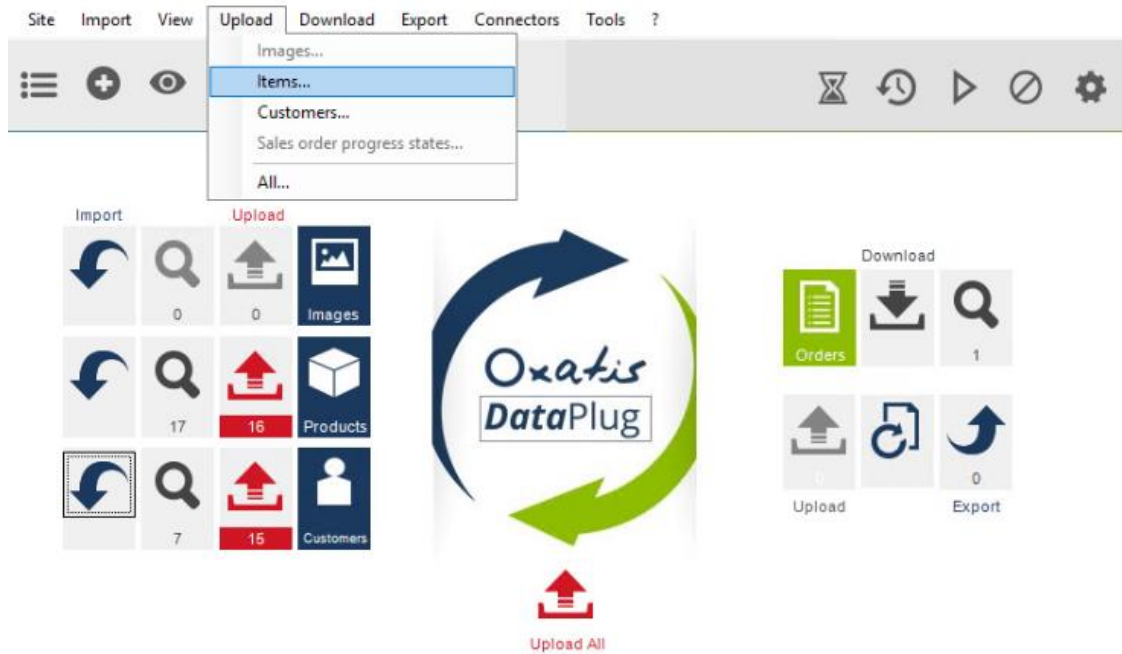
Last step: The importation of products from Sage 200c 2018 On Premise is complete. The number of products that were imported or updated in the DataPlug database is displayed in the results. By clicking on the "Finish" button, all of the import settings (product selection criteria) are saved.



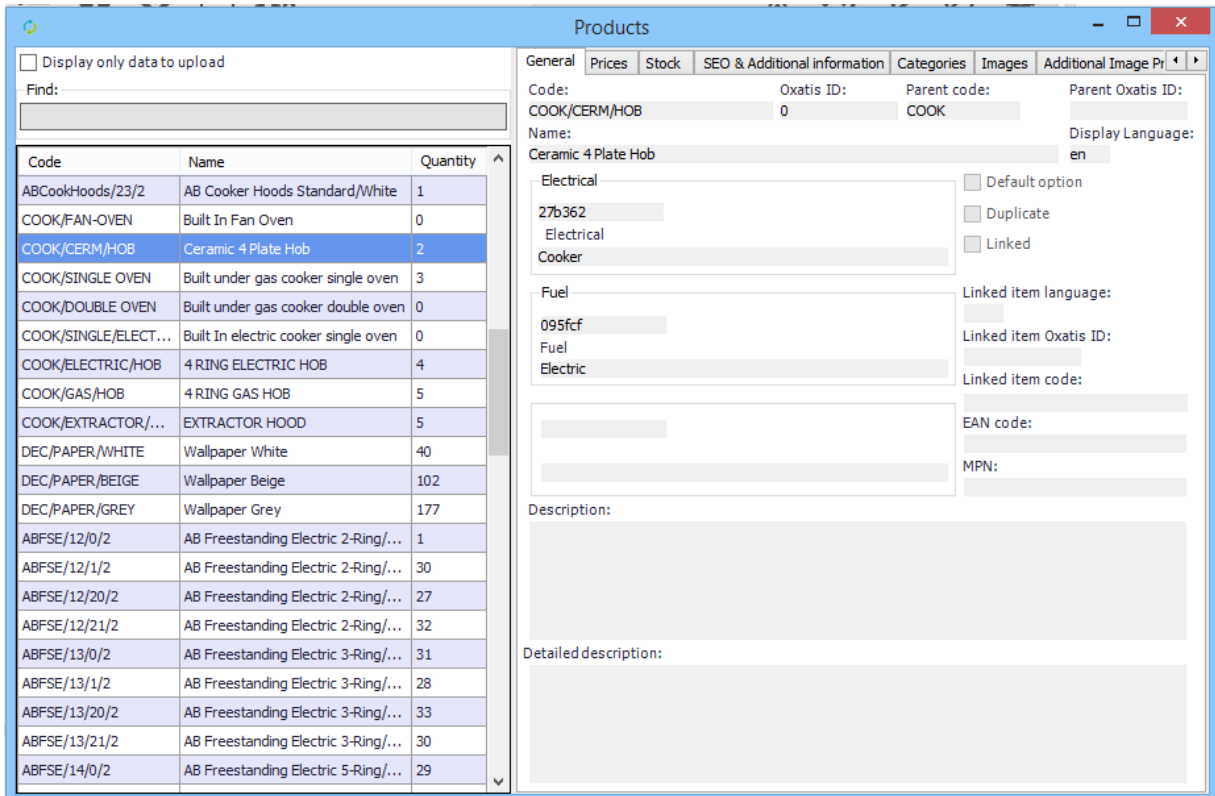
6. Preview of the Products imported from Sage 200c 2018 On Premise

Once the products have been imported from Sage 200c 2018 On Premise, the main screen of the DataPlug is refreshed and displays the number of products imported or updated in the DataPlug's database.

You can view this data in the **View | Products** menu before uploading them to your Oxatis website.



Preview of the "General" tab in the product list.



Preview of the "Prices" tab in the product list.

The screenshot shows the 'Products' window with the 'Prices' tab selected. On the left, a table lists various products with their codes, names, and quantities. The 'COOK/CERM/HOB' product is highlighted. On the right, the pricing details for this product are shown, including VAT, discount grid codes, and a table of price indices.

Code	Name	Quantity
ABCookHoods/23/2	AB Cooker Hoods Standard/White	1
COOK/FAN-OVEN	Built In Fan Oven	0
COOK/CERM/HOB	Ceramic 4 Plate Hob	2
COOK/SINGLE OVEN	Built under gas cooker single oven	3
COOK/DOUBLE OVEN	Built under gas cooker double oven	0
COOK/SINGLE/ELECT...	Built In electric cooker single oven	0
COOK/ELECTRIC/HOB	4 RING ELECTRIC HOB	4
COOK/GAS/HOB	4 RING GAS HOB	5
COOK/EXTRACTOR/...	EXTRACTOR HOOD	5
DEC/PAPER/WHITE	Wallpaper White	40
DEC/PAPER/BEIGE	Wallpaper Beige	102
DEC/PAPER/GREY	Wallpaper Grey	177
ABFSE/12/0/2	AB Freestanding Electric 2-Ring/...	1
ABFSE/12/1/2	AB Freestanding Electric 2-Ring/...	30
ABFSE/12/20/2	AB Freestanding Electric 2-Ring/...	27
ABFSE/12/21/2	AB Freestanding Electric 2-Ring/...	32
ABFSE/13/0/2	AB Freestanding Electric 3-Ring/...	31
ABFSE/13/1/2	AB Freestanding Electric 3-Ring/...	28
ABFSE/13/20/2	AB Freestanding Electric 3-Ring/...	33
ABFSE/13/21/2	AB Freestanding Electric 3-Ring/...	30
ABFSE/14/0/2	AB Freestanding Electric 5-Ring/...	29

Pricing details for 'COOK/CERM/HOB':

- Eco-Tax (Incl. VAT):
- Discount grid code:
- Cost (Excl. VAT): 100,72
- Tax country ISO code: GB

Price Index	Sale Price (Ex VAT)	Sale Price (Inc VAT)	Strikethro Price (Ex VAT)	Strikethro Price (Inc VAT)	VAT Rate	Packaging Unit	Discount Rule
1	151,3				20		
2	151,3				20		
3	151,3				20		
4	151,3				20		
5	151,3				20		
6					20		
7					20		
8					20		
9					20		

Preview of the "Categories" tab in the product list.

The screenshot shows the 'Products' window with the 'Categories' tab selected. The product list on the left is identical to the previous screenshot. On the right, the category assignment fields are visible.

Category assignment details:

- First category:
- Second category:
- Third category:
- Product family: COOKING

7. Importing Customers

1. The DataPlug Link for Sage 200c 2018 On Premise allows you to import customers and contacts, provided that they contain an email address.

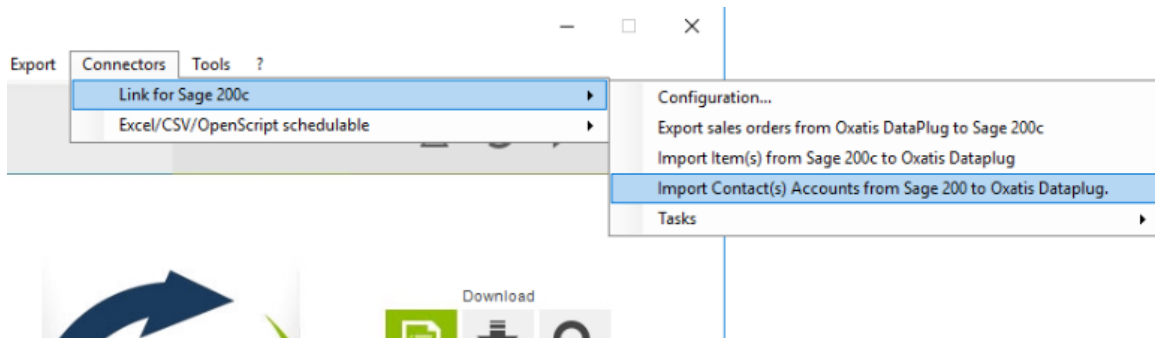
2. Below are the Oxatis fields that are automatically mapped by the Link for Sage 200c 2018:

Oxatis	Sage 200c 2018 On Premise
Last Name	Last name
First Name	First name
Email	Email
Company	Company name
VAT Reg No	VAT Number
Phone	Telephone
Secondary Phone	Mobile
Fax	Fax
Address	Address
Postal Code	Post Code
Shipping Address	Address Line 1 + Address Line 2 (Delivery address)
Postal Code(Shipping Address)	Post Code (Delivery address)
Country (Shipping Address)	Country Code (Delivery address)
Phone (Shipping Address)	Telephone (Delivery address)
Discount	Invoice Discount %

3. Importing customers:

*Click on the following menu in the DataPlug: **Connectors | Link for Sage 200c | Import Customer Account from Sage 200c to DataPlug.***

You will then be guided through the configuration of the data to import.



1st step: You can select:

- A different range of:
 - Contact Last names.
 - Default Email
 - Contact Role Name
 - Customer Account Number
- A Customer Account Code, who will be the Sage 200c customer gathering all the B2C contacts. Indeed, any new B2C contact will be added to this customer.

Import Contacts from Sage 200c [EN]

Oxatis
DataPlug

Import Contacts from Sage 200c
Company: demodata

Filters

Field: LastName

From:

To:

Import Default Contact only

B2C Customer (GBP)

Customer Account Code: CASH01

Contacts from this account will be imported as cash

< Back Next > Cancel



This B2C Customer Account must be in the currency defined on the Oxatis website. (Which is displayed in brackets as a reminder)



This B2C customer account is automatically retrieved from Sage 200c
The client is displayed:
Sales Order Processing > SOP Utilities > System Set Up > SOP Settings > Default Accounts
Allow cash orders to be taken, using this account

2nd step: You can select the following options:

- Import Line Discount
- Import Discount for Product group and discount for Stock Item
- Automatically map the Oxatis Price and the Customer Price (Sage)
- A choice for importing shipping addresses
- Account balance threshold limit before the customer moves from customer in account to cash customer
If Credit limit > (balance + informed number) the customer moves from customer in account to cash customer

Import Contacts from Sage 200c [EN]

Additional informations

Customer Discounts

- Line Discount
- Discount for Product Group
- Discount for Stock Item

Oxatis Customer Price

- Automatic mapping of Customer Price (Sage) Band and (Oxatis) Price (1 to 10)

Account Balance Threshold

Account Balance Threshold
0

Delivery Addresses

- Import all delivery addresses

< Back Next > Cancel

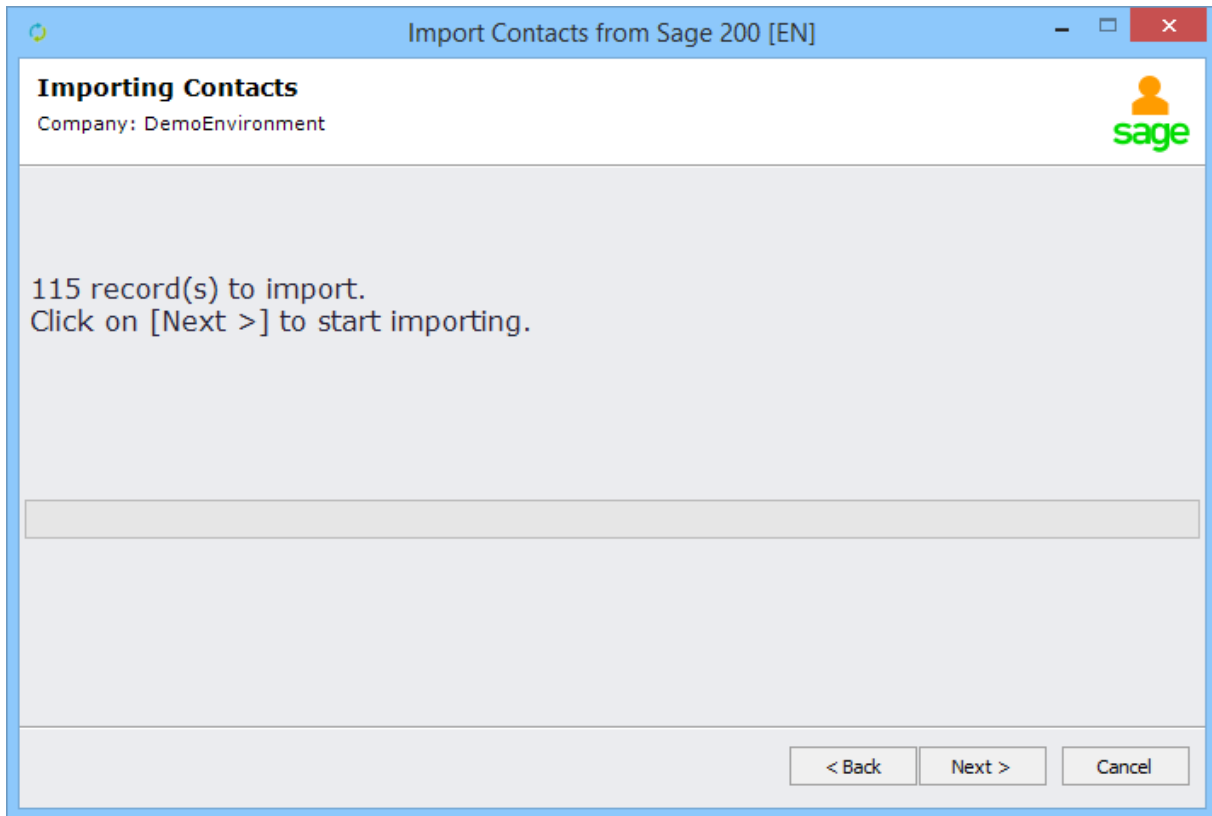
Final step: In this step, all fields from the Oxatis users – that are not automatically mapped by the connector – are proposed in order to be associated manually to Sage fields.

Import Contacts from Sage 200 [EN]

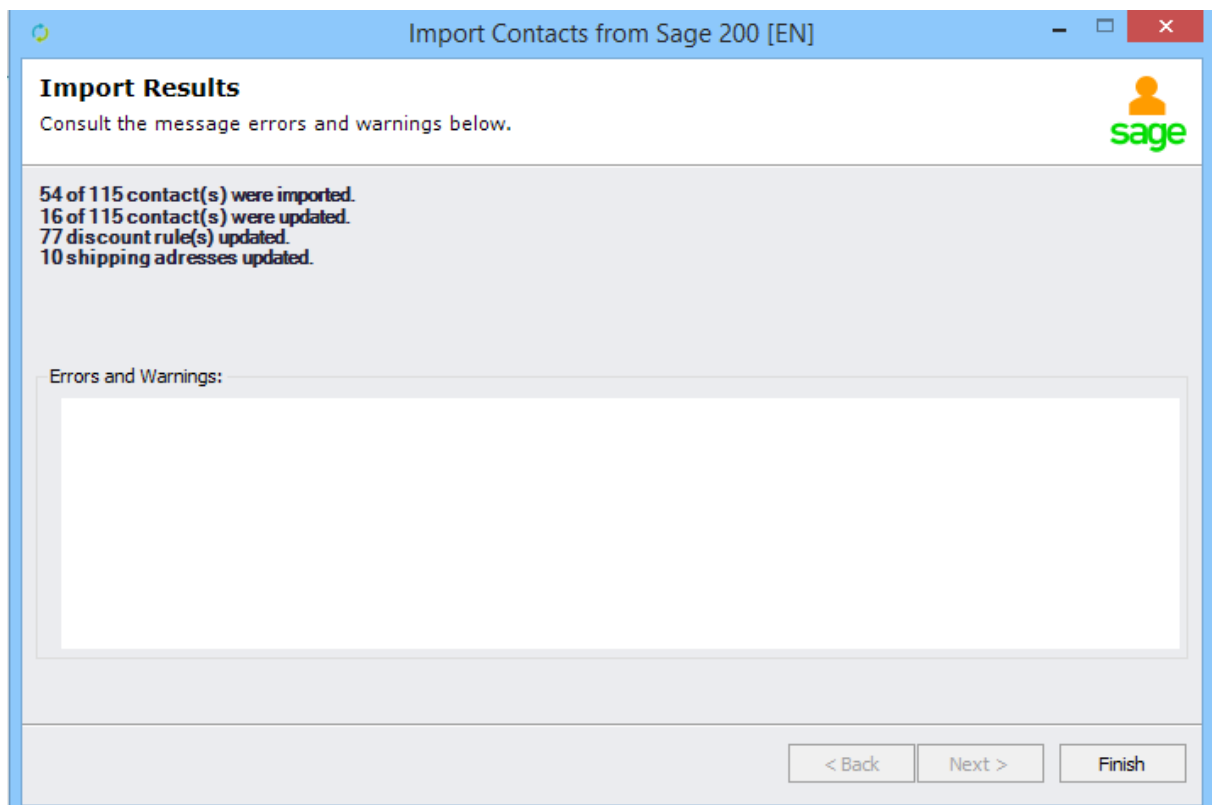
Columns mapping
Define column mapping and their default values.

Oxatis Fields	Sage Fields	Default Value
Password		
Subscribed to newsletters		
Customer Account		true
First category name		
Second category name		
Third category name		
Fourth category name		
Global discount rate	InvoiceDiscountPercent	
Date of birth		
Comments	Description	
Reward points		
Subscribed to SMS Marketing		
Custom text field 1		

< Back Next > Cancel



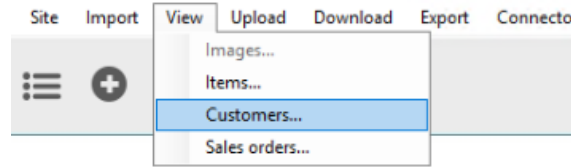
Last step: The import of customers from Sage 200c 2018 is complete. The number of customers that were imported or updated in the DataPlug database is displayed in the results. By clicking on the "Finish" button, all of the import settings (customer selection criteria) are saved.



8. Previewing Customers Imported from Sage 200c 2018 On Premise

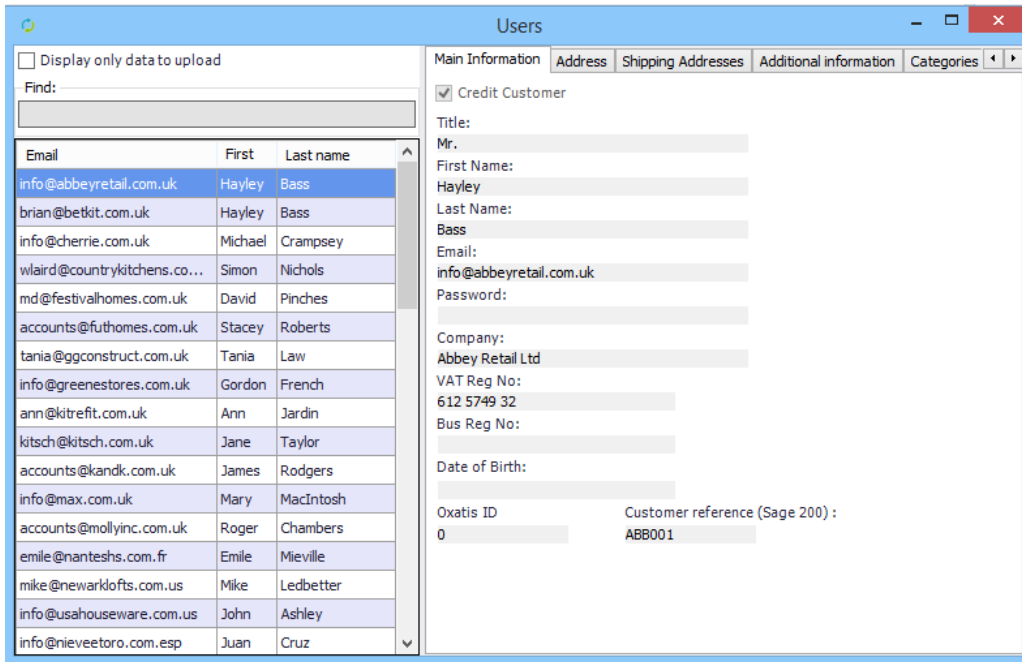
Once users have been imported from Sage 200c 2018 On Premise, the main screen of the DataPlug is refreshed and displays the number of customers or users imported or updated in the DataPlug's database.

You can view this data in the **View | Users** menu before uploading it to your Oxatis website.

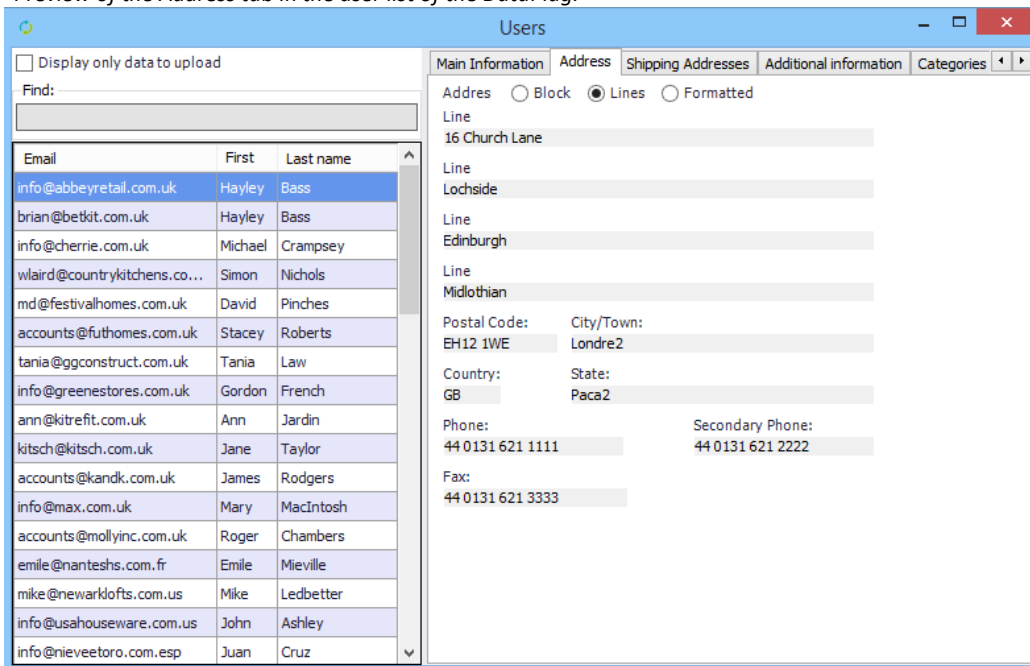


Preview of the "Main Information" tab in the user list of the DataPlug.

Note: You will find the Sage 200c 2018 On Premise "customer code" in the "customer reference" field.

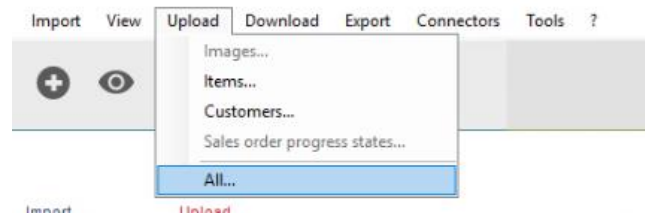


Preview of the Address tab in the user list of the DataPlug.

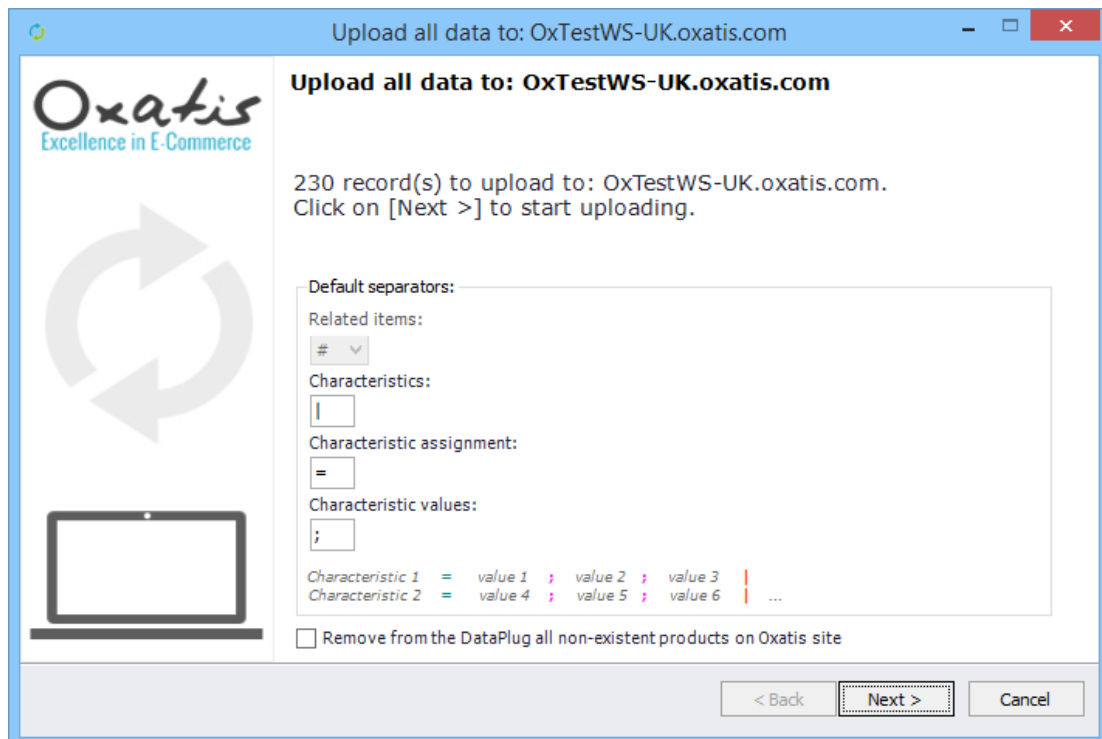


9. Uploading Data (Images, Products and Users) to Oxatis

Data from Sage 200c 2018 On Premise can be uploaded from the DataPlug to Oxatis separately (Products, Images, Users) or all at once from the DataPlug menu: **Upload** | **All**.



The total number of records (Images, Products and Users) to be uploaded to Oxatis is displayed before the data is uploaded.



Click on **“Next”** to upload the data to the Oxatis website.

You can cancel the upload at any time and send the remaining data at a later date.

Once the upload is complete, the number of records (Images, Products and Users) that were uploaded to the Oxatis site will be displayed.

Upload all data to: OxTestWS-UK.oxatis.com

Upload Results

Consult the message errors and warnings below.

Results
24 of 24 image(s) uploaded.
101 of 101 product(s) uploaded.
All product characteristics uploaded.
54 of 54 user(s) uploaded.
10 of 10 shipping address(es) uploaded.
All product bundles uploaded.
14 discount rule(s) uploaded.

Errors and Warnings:

Product family name: "DOORS" not found.

Product family name: "PANELS" not found.

Copy errors and warnings to clipboard

< Back Next > Finish

10. Viewing Data Uploaded to the Oxatis Webite

CUSTOMERS/USERS: Log in to the Oxatis website and click on the following menu to see the customers/users uploaded from the DataPlug: **Marketing | Users**

Below is a preview of the uploaded users.

<input checked="" type="checkbox"/>	Creation Date	Last Name	First Name	Email	Language	Company	
<input type="checkbox"/>	29 March 2016	Ashley	John	info@usahouseware.com.us		New Hampshire Houseware (USA)	
<input type="checkbox"/>	29 March 2016	Bass	Hayley	brian@betkit.com.uk		Better Kitchens	
<input type="checkbox"/>	29 March 2016	Brendan	Harry	info@rwk.com.uk		Rose & Woodpack & King	
<input type="checkbox"/>	29 March 2016	Carrere	Jacques	carrere@ouest.com.fr		Ouest Home Stores (Fr)	
<input type="checkbox"/>	29 March 2016	Chambers	Roger	accounts@mollyinc.com.uk		Molly Inc	
<input type="checkbox"/>	29 March 2016	Cornet	Loic	loic.cornet@oxatis.com		Oxatis	
<input type="checkbox"/>	29 March 2016	Crampsey	Michael	info@cherrie.com.uk		Cherrie Ltd	

PRODUCT CATEGORIES: To see the product categories created during the upload, click on the **Commerce | Categories** menu.

Items - Category Editing

English Classify by name

Add a category to the root

- ACCESSORIES
- BESPOKE
- Built-In
- CABINETS
- Cooker Hoods
- COOKING
- DECORATING
- FS Electric
- FS Gas
- LINOLEUM
- PAINT
- PLUMBING
- PROM
- RangeStyle
- SUMMER LINES
- TILE
- WWRE

PRODUCTS: To see the products created during the upload, click on the **Commerce | Items** menu.

Below is the detailed product information for product code "COOK/CERM/HOB":

Main information: Prices, Product Code, EAN Code, Name...

Home Site Galleries Commerce Components Marketing Account Help
oxtestws-uk.oxatis.com

Item : Ceramic 4 Plate Hob (Electrical: Cooker, Fuel: Electric) - Properties

Back Modify Delete

General Image(s) Categories SEO Language and Visibility Attributes Up/Cross-Selling Characteristics Bundle +

MAIN Additional Stock Availability Weight and Dimensions Handling Intangible Items

Main Information

Code: COOK/CERM/HOB
 EAN Code:
 MPN:
 Name: Ceramic 4 Plate Hob
 Electrical: Cooker
 Fuel: Electric
 Short Description:

	Sale Price		Strikethrough-Price		Packing Unit	Discount
	Ex VAT	Inc VAT	Ex VAT	Inc VAT		
Price 1	151.3	181.56			1	
Price 2	151.3	181.56			1	
Price 3	151.3	181.56			1	
Price 4	151.3	181.56			1	
Price 5	151.3	181.56			1	
Price 6					1	
Price 7					1	
Price 8					1	
Price 9					1	
Price 10					1	

Item Family: COOKING
 Eco-Tax (Inc VAT):
 VAT Rate: UK - Standard Rate (20.0%)
 Cost (Ex VAT): 100.72

Product Quantity in Stock and Low stock Level

Home Site Galleries Commerce Components Marketing Account Help
oxtestws-uk.oxatis.com

Item : Ceramic 4 Plate Hob (Electrical: Cooker, Fuel: Electric) - Properties

Back Modify Delete

General Image(s) Categories SEO Language and Visibility Attributes Up/Cross-Selling Characteristics Bundle +

Main Additional **STOCK** Availability Weight and Dimensions Handling Intangible Items

Stock

Quantity in Stock: 2 Unit(s)
 Low Stock Level: 0 Unit(s)
 Item in stock (Quantity in stock > 0):

Show that item is in stock (Example: "In Stock")
 Show stock level (Example: "4 Items in Stock")

Product Weight

Item : Ceramic 4 Plate Hob (Electrical: Cooker, Fuel: Electric) - Properties

Back Modify Delete

General Image(s) Categories SEO Language and Visibility Attributes Up/Cross-Selling Characteristics Bundle +

Main Additional Stock Availability **WEIGHT AND DIMENSIONS** Handling Intangible Items

Weight and Dimensions
Weight: 85 Gram(s)
Height: 0 Centimeter(s)
Width: 0 Centimeter(s)
Length: 0 Centimeter(s)

Product Categories

Item : Ceramic 4 Plate Hob (Electrical: Cooker, Fuel: Electric) - Properties

Back Modify Delete

General Image(s) **Categories** SEO Language and Visibility Attributes Up/Cross-Selling Characteristics Bundle +

CATEGORY CLASSIFICATION

Category Classification
Category 1: COOKING
Category 2:
Category 3:

Product Characteristics

Item : Ceramic 4 Plate Hob (Electrical: Cooker, Fuel: Electric) - Properties

Back Modify Delete

General Image(s) Categories SEO Language and Visibility Attributes Up/Cross-Selling **Characteristics** Bundle +

CHARACTERISTICS

Edit Characteristics

Characteristics								
<table border="1"> <tr> <td>Electrical</td> <td>• Cooker</td> <td>Fuel</td> <td>• Electric</td> </tr> <tr> <td><i>Electrical</i></td> <td></td> <td><i>Fuel</i></td> <td></td> </tr> </table>	Electrical	• Cooker	Fuel	• Electric	<i>Electrical</i>		<i>Fuel</i>	
Electrical	• Cooker	Fuel	• Electric					
<i>Electrical</i>		<i>Fuel</i>						

11. Example: 2 Orders placed on the Oxatis website

Two orders have been placed on the website to be downloaded to the DataPlug.

The first order (No. 15102899) has been billed excluding VAT, the second order (No. 15102964) has been billed including VAT.

Below is a preview of the orders placed on the Oxatis site

Site Galleries Commerce Components Marketing Account Help
oxtestws-uk.oxatis.com

Order Tracking

Date
Filter Refresh States of Progress Invoice Properties Statistics
(2 Elements)


Quick filter:

<input checked="" type="checkbox"/>	Src	No.	Date	Time	Amount	Invoice No.	Language	Customer	Payment	Status	Progress	Indicator	
					From <input type="text"/>	<input type="text"/>						<input type="text"/>	<input type="button" value="OK"/> <input type="button" value="X"/>
<input type="checkbox"/>		15102964	29 March 2016	13:21	470.99			Hayley BASS			(Undefined)		
<input type="checkbox"/>		15102899	29 March 2016	13:15	619.11			Hayley BASS			(Undefined)		

Canceled,
 Technical Error,
 Contacting Payment Processor,
 Payment in Process,
 Payment Refused,
 Payment Confirmed

Website,
 eBay,
 Amazon,
 Facebook,
 Mobile,
 MOTO

Below is a preview of the order including VAT and a global discount of 10%.

Order #15102964 

29 Mar 2016

Customer Information

Mr. Hayley Bass (info@abbeyretail.com.uk)
Abbey Retail Ltd
Phone: +44 131 621 1111
Fax: 44 0131 621 3333

Address

16 Church Lane
Lochside
Edinburgh
Midlothian
Londre2, Paca2 EH12 1WE
United Kingdom

Shipping Method

UPS

Payment Method


Use Customer Account

Details

<i>Items</i>	<i>Unit Price</i>	<i>Quantity</i>	<i>Amount</i>
AB Built-In Cookers Single-Oven/300mm/White (Code: ABBuiltIn/15/0/2) Number : Single Mm : 300 Color : White	£ 359.98 (Discount 15.00%) £ 305.98	1	£ 305.98
AB Cooker Hoods Standard/White (Code: ABCookHoods/23/2)	£ 36.00	1	£ 36.00
Ceramic 4 Plate Hob (Code: COOK/CERM/HOB) Electrical : Cooker Fuel : Electric	£ 181.56 (Discount 6.00%) £ 170.67	1	£ 170.67
Subtotal before discount			£ 512.65
Discount (10.00%)			- £ 51.27
Subtotal			£ 461.38
Shipping & Handling UPS			£ 9.60
Total			£ 470.99

Base Price (Excl. VAT)	VAT Rate	VAT Amount
384.49	20	76.90

Below is a preview of the order excluding VAT, including discounted individual products, and a global discount of 10%

Order #15102899 

29 Mar 2016

Customer Information

Mr. Hayley Bass (info@abbeyretail.com.uk)
Abbey Retail Ltd
Phone: +44 131 621 1111
Fax: 44 0131 621 3333

Address

16 Church Lane
Lochside
Edinburgh
Midlothian
Londre2, Paca2 EH12 1WE
United Kingdom

Shipping Method

UPS

Payment Method

Use Customer Account

Details

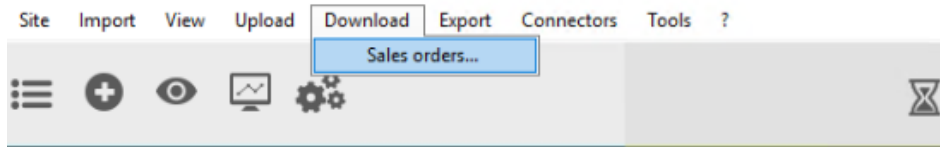
Items	Unit Price	Quantity	Amount
AB Cooker Hoods Chimney/White (Code: ABCookHoods/22/2)	£ 30.00 (Discount 5.00%) £ 28.50	1	£ 28.50
Ceramic 4 Plate Hob (Code: COOK/CERM/HOB) Electrical : Cooker Fuel : Electric	£ 151.30 (Discount 6.00%) £ 142.22	2	£ 284.44
AB Built-In Cookers Single-Oven/300mm/White (Code: ABBuiltIn/15/0/2) Number : Single Mm : 300 Color : White	£ 299.98 (Discount 15.00%) £ 254.98	1	£ 254.98
Subtotal before discount			£ 567.92
Discount (10.00%)			- £ 56.79
Subtotal			£ 511.13
Shipping & Handling UPS			£ 8.00
VAT			£ 99.98
Total			£ 619.11

Base Price (Excl. VAT)	VAT Rate	VAT Amount
25.65	5	1.28
485.48	20	97.10

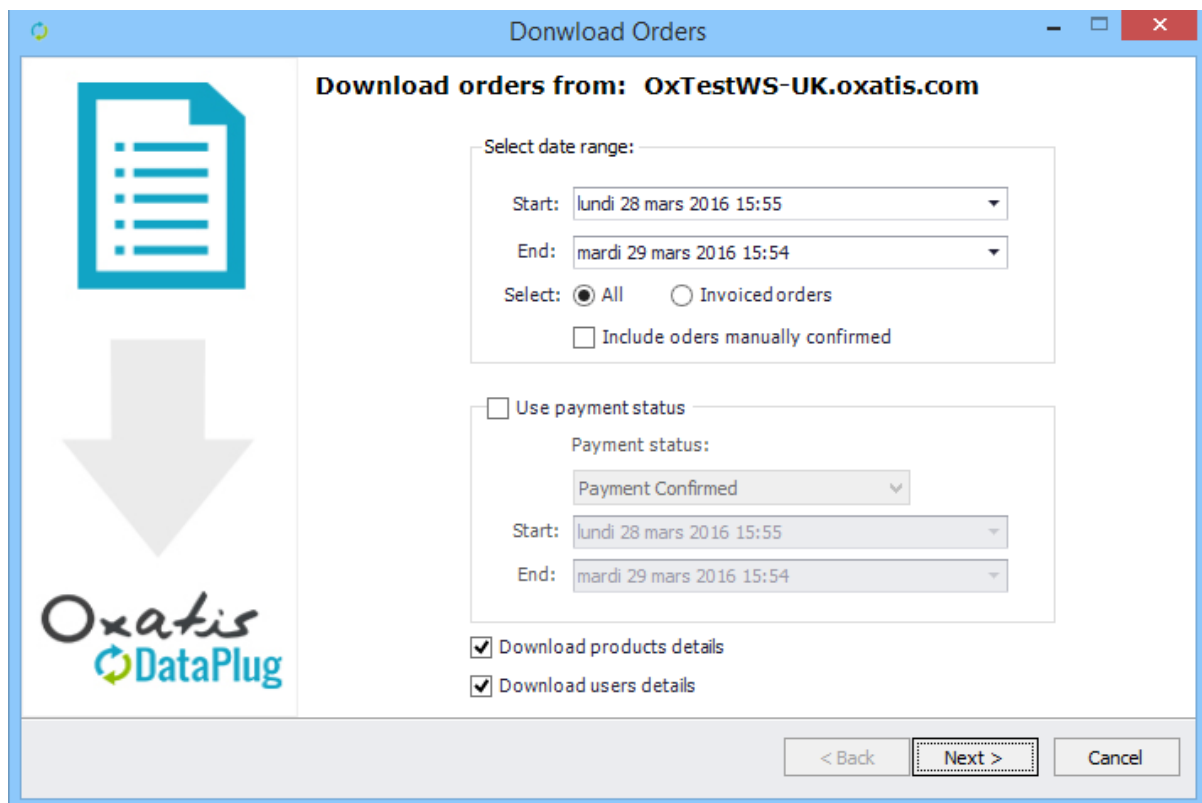
12. Downloading Orders from the Oxatis website to the DataPlug

This involves downloading - or importing - customer orders from the Oxatis website and saving them in the DataPlug's database.

Click on the following menu in the DataPlug: **Download | Orders**.
You will be guided through the configuration of the customer orders to download.



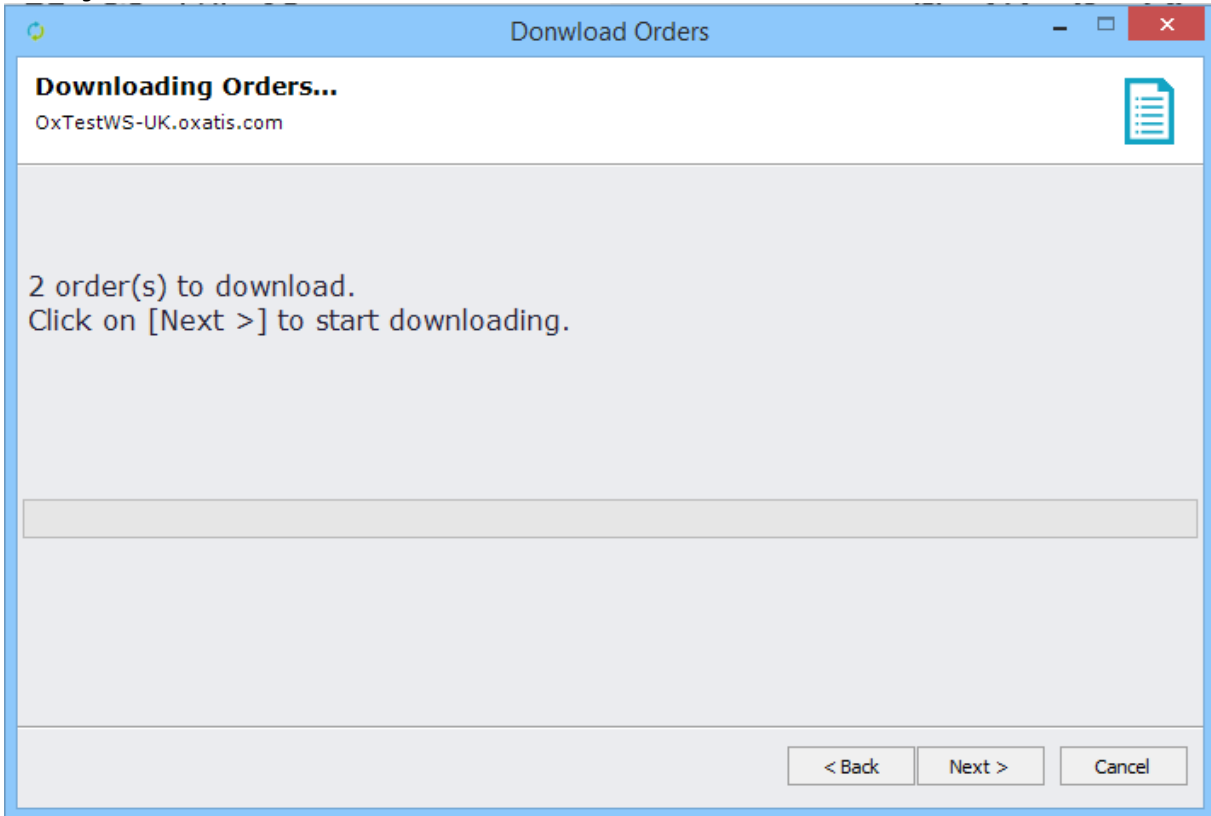
1st step: By default, the current day is proposed in the date range. However, you can select another date range.
Note: Only orders with a confirmed payment status are downloaded. However, you can select another payment status (Contacting Payment Processor, Payment in Process, or Payment Refused), as well as the date range related to the change of the payment status.

A screenshot of the 'Download Orders' dialog box. The title bar says 'Download Orders'. The main content area is titled 'Download orders from: OxTestWS-UK.oxatis.com'. On the left, there is a large blue document icon with a downward arrow and the Oxatis DataPlug logo. The configuration options are as follows:

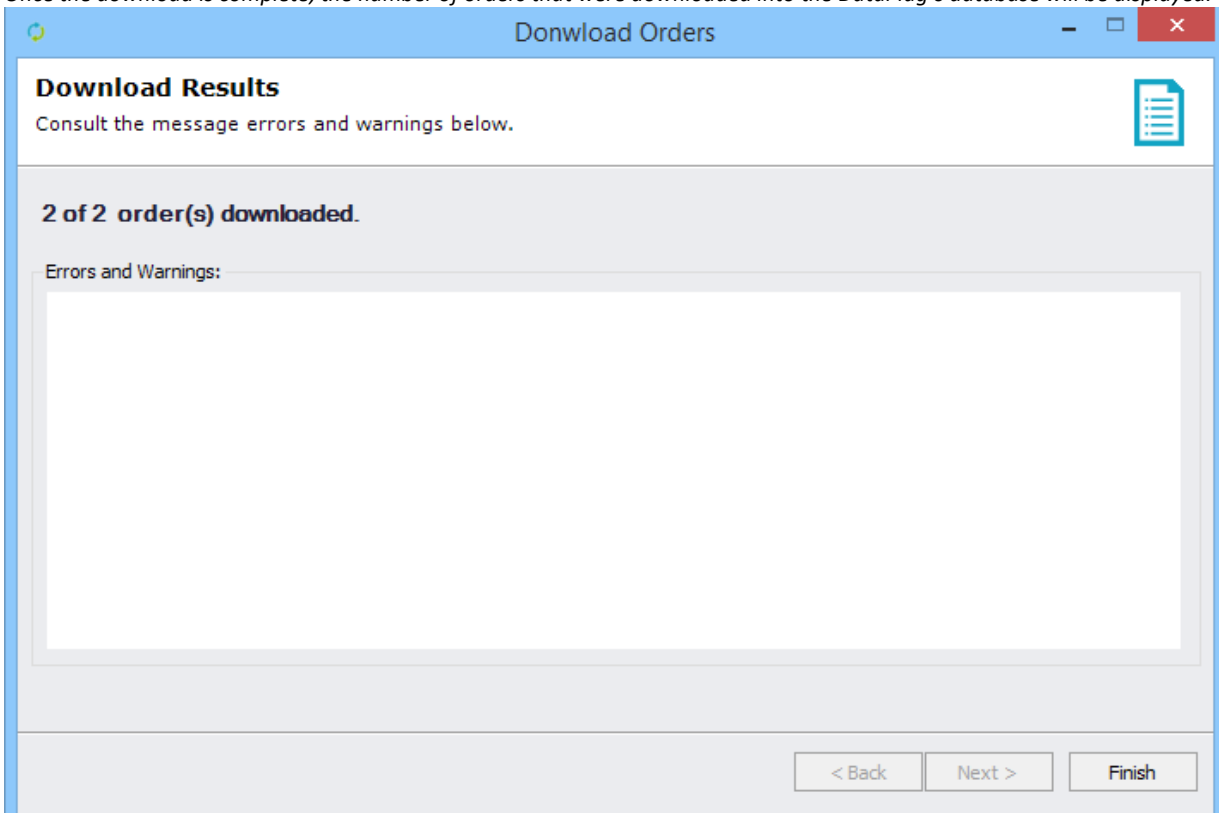
- Select date range:**
 - Start: lundi 28 mars 2016 15:55
 - End: mardi 29 mars 2016 15:54
 - Select: All Invoiced orders
 - Include orders manually confirmed
- Use payment status
 - Payment status: Payment Confirmed
 - Start: lundi 28 mars 2016 15:55
 - End: mardi 29 mars 2016 15:54
- Download products details
- Download users details

At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

2nd step: The number of orders to download is displayed. Click on the "Next" button to download the customer orders to the DataPlug.



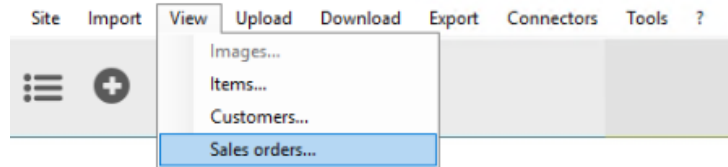
Once the download is complete, the number of orders that were downloaded into the DataPlug's database will be displayed.



13. Viewing Orders Downloaded to the DataPlug

Once orders have been downloaded from Oxatis, the main screen of the DataPlug is refreshed and displays the number of orders (2) downloaded to the DataPlug's database.

You can view this data in the **View | Orders** menu before exporting them to Sage 200c 2018 On Premise.



Below is a preview of the "Total" tab for the order selected from the list.

The screenshot shows the 'Orders' window with the 'Total' tab selected. On the left is a table of orders. On the right, the 'Total' tab displays various financial details.

Order	Date	Email
15102899	29/03/2016 13:15	info@abbeyretail.com.uk
15102964	29/03/2016 13:21	info@abbeyretail.com.uk

Financial Summary:

- Total VAT excluded: 567,92
- Currency: GBP
- Discount: 10,00 % (56,79)
- Total discounted VAT excluded: 511,13
- Shipping price VAT excluded: 8,00
- Total: 619,11

Base	VAT Rate	VAT Amount
25,65	5,00	1,28
485,48	20,00	97,10

Tax Summary:

- Total Tax: 98,38
- Shipping Tax: 1,60
- Shipping Tax Rate: 20,00

Below is a preview of the "Order Details" tab, where all products for the selected order can be found.

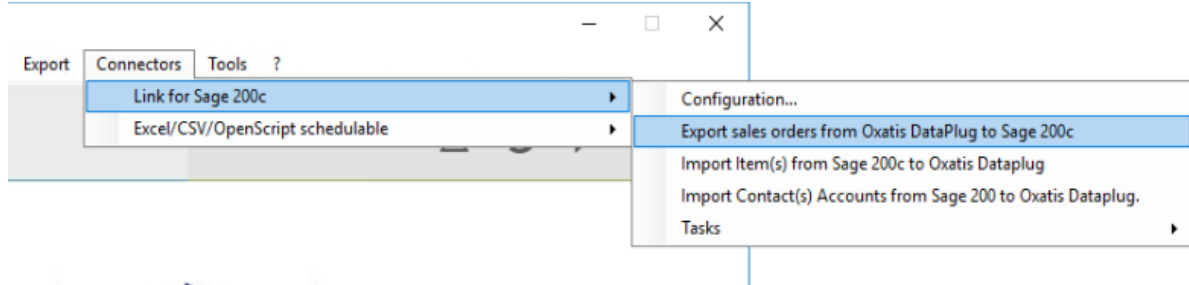
The screenshot shows the 'Orders' window with the 'Order Details' tab selected. It displays a table of items for the selected order.

Item Code	Item Name	Quant	Gross Price	Discount Rate	Net Price	Tax Rate	Net Amount	Ecotax Tax Includ	Offered
COOK/CERM/HOB	Ceramic 4 Plate Hob	2	151,30	6,00	142,22	20,00	284,44	0,00	<input checked="" type="checkbox"/>
ABCookHoods/22/2	AB Cooker Hoods Ch...	1	30,00	5,00	28,50	5,00	28,50	0,00	<input type="checkbox"/>
ABBuiltIn/15/0/2	AB Built-In Cookers ...	1	299,98	15,00	254,98	20,00	254,98	0,00	<input type="checkbox"/>

14. Export Customer Orders to Sage 200c 2018

Exporting orders from Oxatis to Sage 200c 2018 On Premise entails creating new sales orders in the company's Sage 200c 2018 On Premise.

In the DataPlug, click on the menu: **Connectors | Link for Sage 200c | Export Orders from DataPlug to Sage 200c**
You will be guided through the necessary configurations to export your orders.



1st step: By default, the DataPlug proposes to export all orders that have not yet been exported to Sage 200c 2018 On Premise.

However, you can select a date range, with the option to export orders that have already been exported.



2nd step: You should select the following parameters:

- The selected warehouse will be linked to the new orders to import in the Sage database. By default, it is the one connected during the products importation.
- Oxatis's payment methods must be associated to the payment methods filled in Sage. (Oxatis's "generic" payment methods will be associated with Sage's "other" payment methods) or it is possible to associate no payment to the order
- The user code holding every B2C customer is here for your information. It is the one filled during user importation.
- The Sage 200c "Customer document No" field prefix. This is not mandatory.
- One analysis code to contain the source mapping

Export Sales Orders to Sage 200c [EN]

Sales orders export settings

Additional informations

Mapping Oxatis payment methods

Checks : No payment

Credit Cards: Visa credit card

Wire transfer: Switch debit card

Paypal: No payment

Credit Cards (X times): No payment

Other: No payment

Sage 200c Sales Order "Customer Document No":

This "Customer Document No" field can be customized by entering a text below that will be completed automatically by the Oxatis Sales Order number.

Ox_Doc

Sales Order default warehouse:

WAREHOUSE

B2C Customer (GBP)

Customer Account Code: CASH01

Sales Order source mapping

Select analysis code for source mapping :

Sales Area

< Back Next > Cancel



It is only possible to export orders whose items are in the same warehouse. Indeed, if an order contains 2 products from 2 different warehouse, no order will be exported.




Reminder: The B2C customer account must have the same currency between Sage 200c and the Oxatis website. The Oxatis currency is displayed in brackets.

3rd step: You have to associate a shipping option from Oxatis to an additional charge in Sage 200c, where you charge the shipping costs.

Export Sales Orders to Sage 200c [EN]
— □ ×

Shipping settings

Map Oxatis shipping methods with Sage additional charges 

	Oxatis ID	Name	Sage additional charge	Default
	92557	Royal Mail	Carriage	<input type="checkbox"/>
I	92552	Chronopost	Express Delivery ▼	<input type="checkbox"/>

< Back
Next >
Cancel

4th step: You have to link VAT rates for local, EU and export.

The screenshot shows a software window titled "Export Sales Orders to Sage 200 [EN]". The main heading is "Local & Export Sales VAT mapping".

Local Sales

Oxatis Rate	Sage Rate
UK - Standard Rate (20.0%)	Std Rate
UK - Reduced Rate (5.0%)	Reduced Rated
UK - Zero Rate (0.0%)	Zero Rated

EU Sales

Oxatis Rate	Sage Rate
UK - Standard Rate (20.0%)	EU Std Rate
UK - Reduced Rate (5.0%)	EU Reduced Rate
UK - Zero Rate (0.0%)	EU Zero Rated

Export Sales

Sage Rate:

Buttons: < Back, Next >, Cancel

Last step: The number of orders to export is displayed. Click on the "Next" button to export the customer orders to the Sage 200c 2018 On Premise.

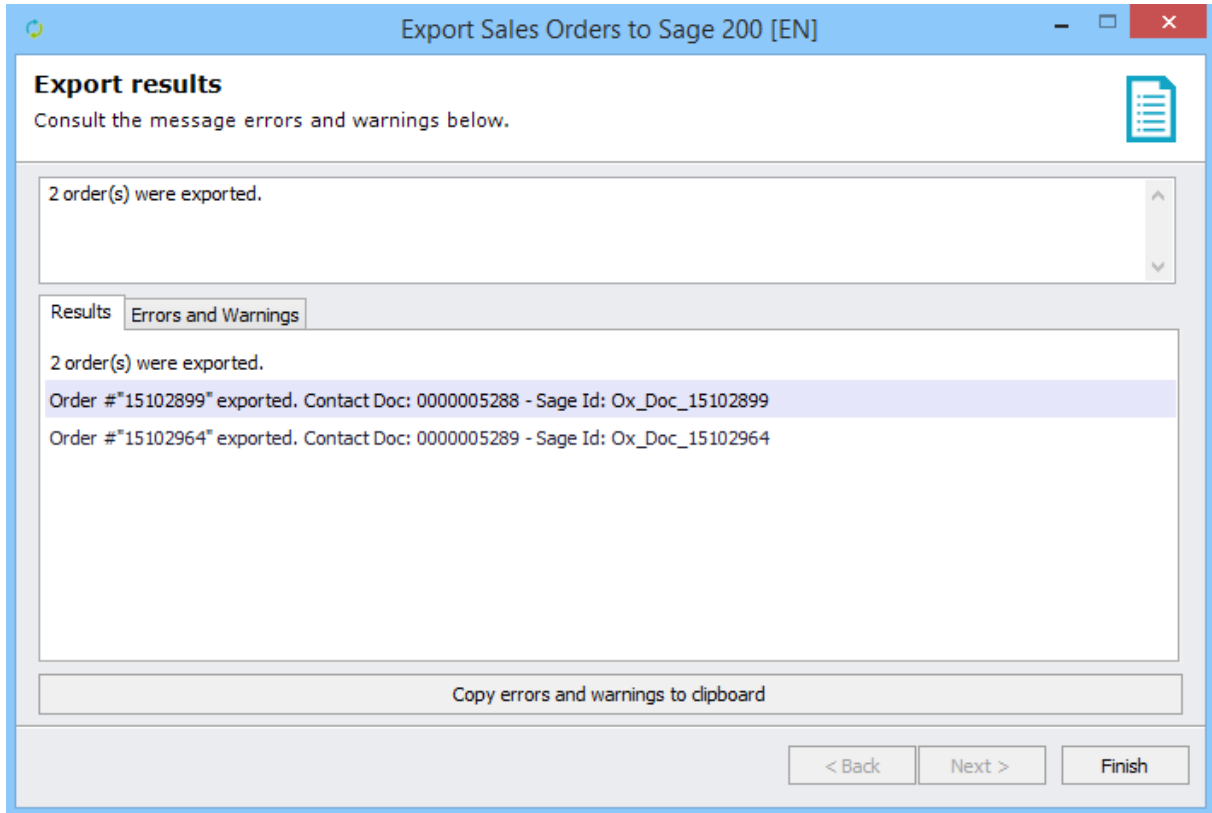
The screenshot shows a software window titled "Export Sales Orders to Sage 200 [EN]". The main heading is "Exporting Sales Orders to Sage 200".

2 order(s) to export.
Click on [Next >] to start exporting.

Buttons: < Back, Next >, Cancel

Once the export is complete, the number of orders that were exported and customer accounts that were added to Sage 200c 2018 On Premise will be displayed.

You can copy/paste the contents of the results tab to a document to consult the new records in Sage 200c 2018
Click on the "Finish" button to save all of your export settings (order selection criteria).



In the DataPlug, go back to your list of orders and select the "Main Information" tab.

Below is a preview of the "Main Information" tab where you will now see the sales order number from Sage 200c 2018

Orders

Search :

Order	Date	Email
15102899	29/03/2016 13:15	info@abbeyretail.c...
15102964	29/03/2016 13:21	info@abbeyretail.c...

	Details
	<div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding: 2px;"> Details Total Main Information Billing Address Shipping Address Instructions </div>
<div style="border-bottom: 1px solid #ccc; padding: 2px;">Title:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Mr.</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">First Name:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Hayley</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Last Name:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Bass</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Email:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">info@abbeyretail.com.uk</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Company:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Abbey Retail Ltd</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">VAT Reg No:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"></div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Bus Reg No:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"></div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Payment Method:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Use Customer Account</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Discount Coupon:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"></div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Invoice #:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"></div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Invoice Date:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"></div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Delivery Date:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"></div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Point of sale:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"></div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">order #:</div> <div style="border-bottom: 1px solid #ccc; padding: 2px;">000005288</div>	

15. Viewing Sales Orders Imported to Sage 200c 2018

- View sales orders created by the DataPlug export

In Sage 200c 2018 On Premise, go to the menu: **Modules | Sales Orders Processing**

Below is a preview of the 2 orders exported from the DataPlug.

No	Type	Date	Name	Amount	Customer Document No
0000005289	Sales Order	29/03/2016	Abbey Retail Ltd	470,99	Ox_Doc_15102964
0000005288	Sales Order	29/03/2016	Abbey Retail Ltd	619,11	Ox_Doc_15102899

Below is a preview of order No. 5288 in Sage 200c 2018

You can see the three products in the order with their prices, excluding VAT, as well as the global value of the 10% discount, also excluding VAT. The Oxatis order number can be seen here in the "Customer Order No." field.

Delivery information and Special Instructions from the Oxatis order are shown in the reserved rows of the Sage 200c 2018 On Premise order.

Amend Order

Order Details | Delivery & Invoicing | Payment with Order

Account Selection

Customer account (selected) | Cash account

Code: ABB001
Short name: Abbey
Postcode: EH12 1WE
Name: Abbey Retail Ltd
By default supply from: WAREHOUSE

Order Detail

Order no: 0000005288
Order status: Live
Document date: 29/03/2016
Date requested: 29/03/2016
Date promised: 29/03/2016
Customer order no: Ox_Doc_15102899

Show values (selected) | Show quantities

Item	Description	Quantity	Unit Price	Disc. %	VAT Rate	Gross
COOK/CERM/HOB	Ceramic 4 Plate Hob	2,00000	151,30000	6,00	Std Rate	284,44
ABCookHoods/22/2	AB Cooker Hoods Ch...	1,00000	30,00000	5,00	Reduced Rated	28,50
ABBuiltIn/15/0/2	AB Built-In Cookers...	1,00000	299,98000	15,00	Std Rate	254,98
Carriage	Carriage	1,00000	8,00000	0,00	Std Rate	8,00

Subtotals: Goods: £ 567,92; Charges: £ 8,00; Order disc: £ 56,79

Totals: Net: £ 519,13; VAT: £ 99,98; Gross: £ 619,11

Exchange Rate: Rate: 1,000000; Currency: Pounds Sterling

Buttons: Add Items..., Edit Item..., Delete Item, Move Up, Move Down, Save, Save and Generate PO, Order Profit..., Close

Below is a preview of the details for the first product in the order.

Edit Order Item Line
[Close]

Item Type

Standard item
 Free text item
 Additional charge
 Comment line

Product Item

Code: Name:

Warehouse: Amend item description

Fulfilment:

Item Values

Selling unit: <input type="text" value="Each"/>	Selling price unit: <input type="text" value="Each"/>	Unit discount %: <input type="text" value="6,00"/>
Quantity: <input type="text" value="2,00000"/>	Unit price: £ <input type="text" value="151,30000"/>	Unit discount: £ <input type="text" value="9,07800"/>
Qty to allocate: <input type="text" value="2,00000"/>	Stock item unit: <input type="text" value="Each"/>	Disc unit price: £ <input type="text" value="142,22200"/>
Allocated: <input type="text" value="2,00000"/>	Unit cost: £ <input type="text" value="89,00000"/>	

Item Totals

VAT rate: Net value: £ VAT value: £

Document Comments

Project analysis **Nominal analysis**

Project Analysis

Code: Revenue:

Delivery Dates

Requested:

Promised:

Below is the "Delivery & invoicing" tab.

Delivery Address

Postal name: Abbey Retail Ltd
 Address: 16 Church Lane
 Lochside
 Edinburgh
 Midlothian
 City: Londre2
 County: Paca2
 Postcode: EH12 1WE
 Country: United Kingdom
 Contact: Mr. Hayley Bass
 Telephone: +44 131 621 1111
 Fax: 44 0131 621 3333
 E-mail: info@abbeyretail.com.uk

Use invoice address Change...

VAT Details

VAT number:
 VAT code: 1 - Std Rate
 Country code: GB - Great Britain
 Triangulated

Invoice Address

Postal name: Abbey Retail Ltd
 Address: 16 Church Lane
 Lochside
 Edinburgh
 Midlothian
 City: Londre2
 County: Paca2
 Postcode: EH12 1WE
 Country: Great Britain

Early Settlement Discount

Discount %: 0,00 if paid within 0 days

Order Discount / Surcharge

Discount %: 10,00 Value: £ 56,79 Discount

Order Taken By **Order Priority**

Name: madagaga A

Analysis Codes

Name	Value
Sales Area	North
Sales person	None

Buttons: Save, Save and Generate PO, Order Profit..., Close

Below is the "Payment with Order" tab.

Record Payment With Invoice

Record payment with order

Full payment

Invoice payment with order immediately

Payment: £ 0,00
 Method:
 Payment Declared: 0,00
 Payment Undeclared: 0,00
 Declared Payment Remaining: 0,00

Reference:
 Description:

16. Creating Customers in Sage 200c 2018 On Premise

Exporting customer orders to Sage also allows you to create new customer accounts in the Sage database. Below is an example user from the Oxatis website that was exported to Sage 200c 2018 On Premise.

The main tab in the user account.

The screenshot shows the ACTINIC user account interface. At the top, there is a navigation bar with 'Site', 'Galleries', 'Commerce', 'Components', 'Marketing', 'Account', and 'Help'. The user is logged in as 'Arsene Anderson - Element Update'. Below the navigation, there are buttons for 'Back', 'Modify', 'Duplicate', 'Delete', 'Order list', and 'Login as a customer'. The 'General' tab is selected, and the 'MAIN' sub-tab is active. The 'Main Information' section displays the following details:

- Title: Mr.
- First Name: Arsene
- Last Name: Anderson
- Email: actiniconline@oxatis.com
- Password: *****
- Company: Actinic
- VAT No:
- Bus Reg No:
- Telephone: +44 845 129 4800
- Mobile:
- Fax: +44 845 129 4812
- Social Login:
- Language:
- Date of Birth:

Below is the billing address tab in the user account.

The screenshot shows the ACTINIC user account interface, similar to the previous one. The 'ADDRESS' sub-tab is selected under the 'General' tab. The 'Address' section displays the following details:

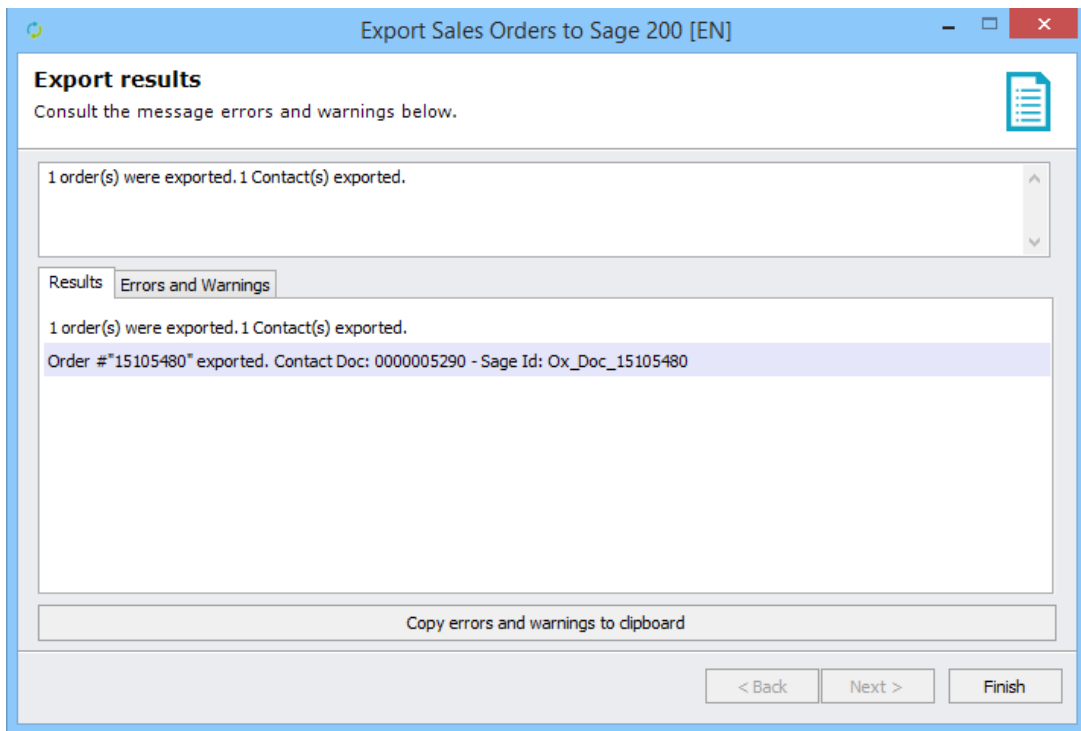
- Address: 37 Manlybone High Street
- Postcode: SW1Y6DS
- City/Town: Picadilly
- State/Country:
- Country: United Kingdom

Below is the shipping address tab in the user account.

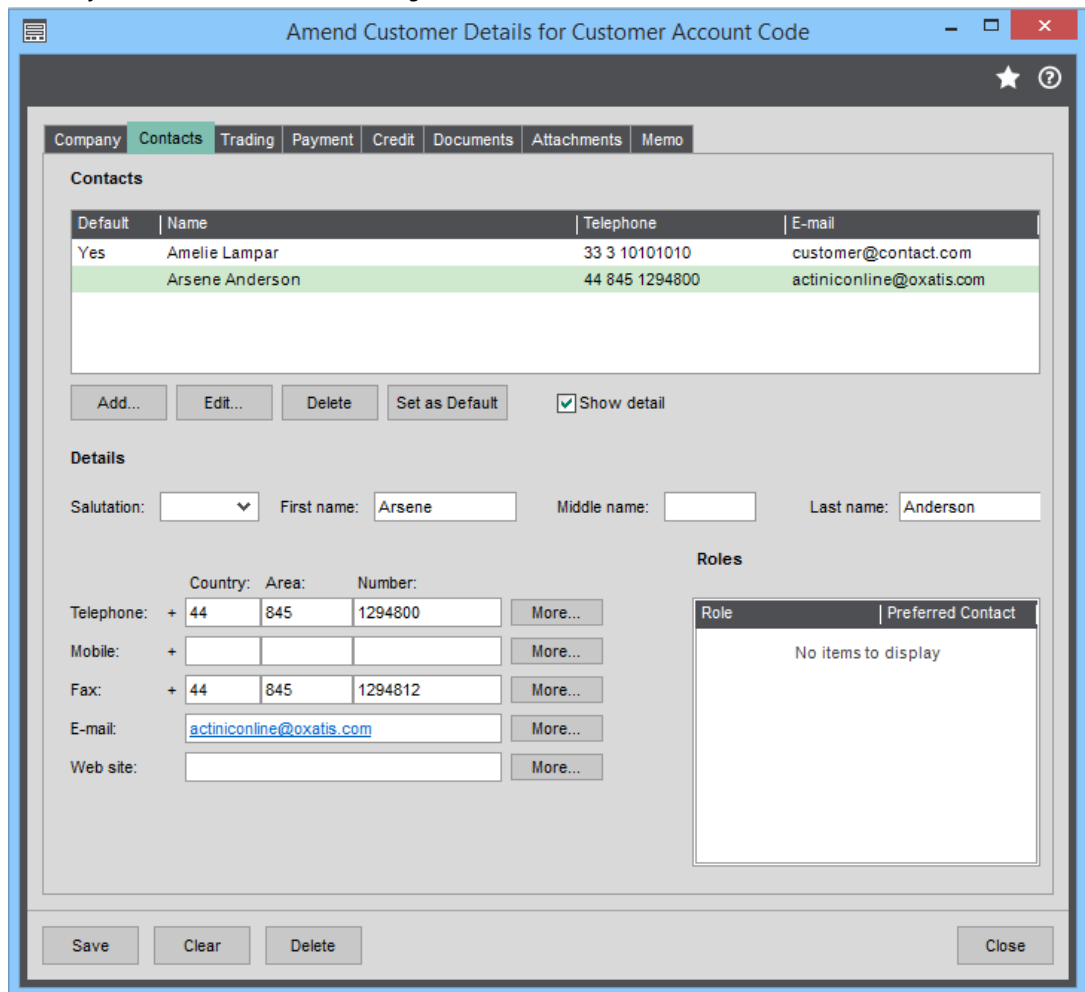
The screenshot shows the ACTINIC user account interface, similar to the previous ones. The 'SHIPPING ADDRESS' sub-tab is selected under the 'General' tab. The 'Shipping Address' section displays the following details:

- Title: Mr.
- First Name: Emma
- Last Name: Gerrard
- Company: Oxatis
- Telephone: +33 40 8411 1287
- Address: 172 Edison Street
- Postcode: CH1 4PL
- City/Town: Chester
- State/Country: Cheshire
- Country: United Kingdom

Exporting this customer's order will automatically add the customer's contact information in the B2C Customer account in Sage 200c 2018:



Below are the details of the new customer created in Sage.



17. Currency Management

To handle more than one currency, it is mandatory to have as many Oxatis websites as there are different currencies, as websites can only handle one currency each. It will then be necessary to import products with the right price and currency, and to import customers with the right currency.

To do so, i. e. with the Euro currency, the product **COOK/CERM/HOB**, and customer NAN001 both carry the Euro currency. Those examples are available in the Sage 200c DemoEnvironment file.

It is first necessary to have a price band in the new currency. In the Selling Price menu of the COOK/CERM/HOB product, fill the price band in €, for example 120 as shown in the example below.

Price Band Name	Use Std	Price	Currency
Standard	<input checked="" type="checkbox"/>	151,30000	Pounds Sterling
Selling Band 2	<input type="checkbox"/>	143,20000	Pounds Sterling
Selling Band 3	<input type="checkbox"/>	165,00000	Pounds Sterling
Selling Band 4	<input checked="" type="checkbox"/>	0,00000	Pounds Sterling
Selling Band 5	<input checked="" type="checkbox"/>	0,00000	Pounds Sterling
Euro	<input type="checkbox"/>	120,00000	Euro

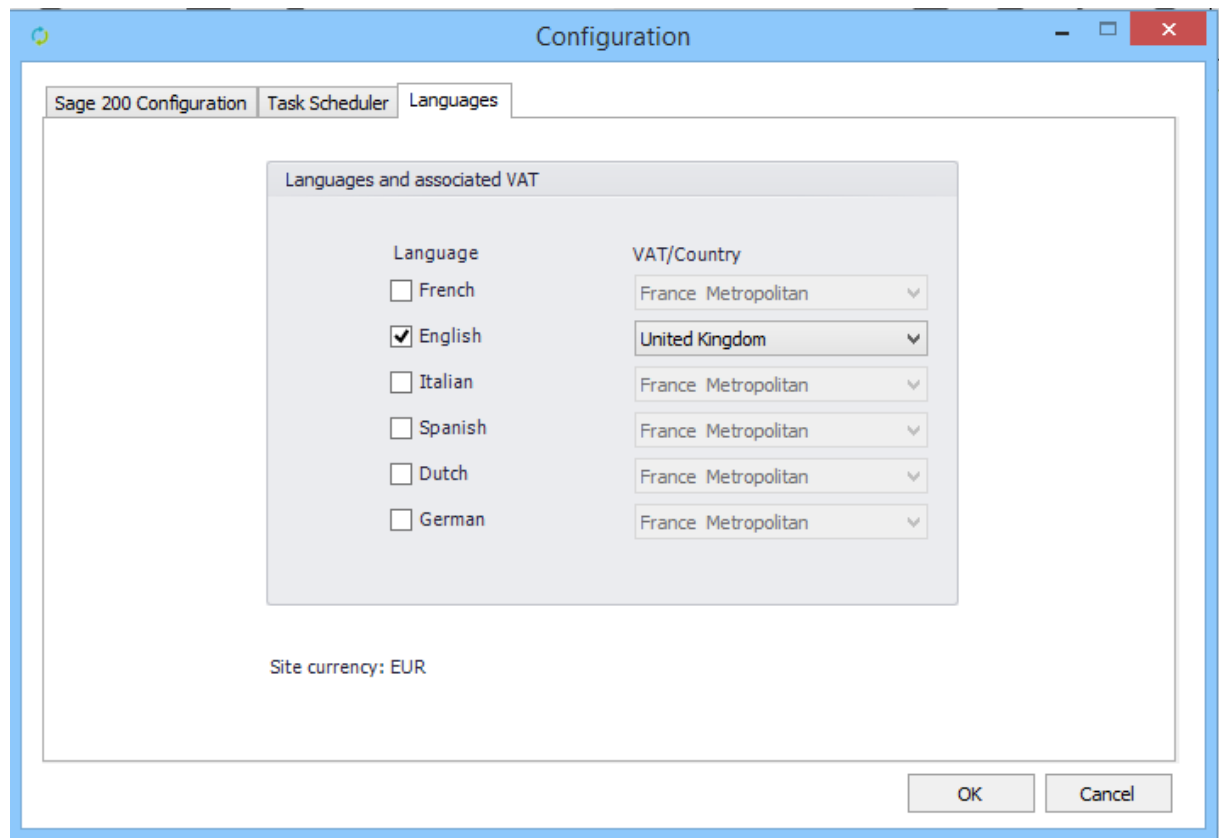
Connect with your DataPlug on an Oxatis website with your new currency, this information appears in the menu "Site > General Properties" in the Oxatis Back Office.

Main Currency

Currency used for prices: Euro (EUR)

Main Currency Format: # €

Go to **Connector/ link for Sage 200c /Configuration** in the DataPlug menu, and select the "Languages" tab. The website's currency is correctly displayed. If the website's currency was changed, it is necessary to wait for the DataPlug to take the information into account, as a cache is being temporarily kept on the website.



In the VAT/Country list, you can leave the website's country, and even with a different currency, you can continue to apply the country's VAT rates.

Then, in the DataPlug's **Connector/ Link for Sage 200c /Import Item(s)** menu, choose the option **Import Items**. During the Item prices mapping, it is only possible to retrieve the prices corresponding to the website's currency. The product will consequently have the wanted currency.

Import Items from Sage 200 [EN]

Item prices mapping

Mapping (Oxatis) prices with (Sage) price band.

Prices	Strikethrough prices
<input checked="" type="checkbox"/> Price 1 Euro Price Band	<input type="checkbox"/> Strikethrough Price 1 Euro Price Band
<input type="checkbox"/> Price 2 Euro Price Band	<input type="checkbox"/> Strikethrough Price 2 Euro Price Band
<input type="checkbox"/> Price 3 Euro Price Band	<input type="checkbox"/> Strikethrough Price 3 Euro Price Band
<input type="checkbox"/> Price 4 Euro Price Band	<input type="checkbox"/> Strikethrough Price 4 Euro Price Band
<input type="checkbox"/> Price 5 Euro Price Band	<input type="checkbox"/> Strikethrough Price 5 Euro Price Band
<input type="checkbox"/> Price 6 Euro Price Band	<input type="checkbox"/> Strikethrough Price 6 Euro Price Band
<input type="checkbox"/> Price 7 Euro Price Band	<input type="checkbox"/> Strikethrough Price 7 Euro Price Band
<input type="checkbox"/> Price 8 Euro Price Band	<input type="checkbox"/> Strikethrough Price 8 Euro Price Band
<input type="checkbox"/> Price 9 Euro Price Band	<input type="checkbox"/> Strikethrough Price 9 Euro Price Band
<input type="checkbox"/> Price 10 Euro Price Band	<input type="checkbox"/> Strikethrough Price 10 Euro Price Band

< Back Next > Cancel

In the DataPlug's **Connector/ Link for Sage 200c/Import Contact(s)** menu, choose the option "Import Contacts". The B2C customer account has to be in the website's currency.

Import Contacts from Sage 200 [EN]

Import Contacts from Sage 200

Company: DemoEnvironment

Filters

Field: LastName

From:

To:

B2C Customer (EUR)

Customer Account Code: OX_B2C_E

< Back Next > Cancel

Execute all the imports, then transfer the products to the website, and check the COOK/CERM/HOB product from the Back-Office, which will display the correct price.

Item : Ceramic 4 Plate Hob (Electrical: Cooker, Fuel: Electric) - Properties

Back Modify Delete

General Image(s) Categories SEO Language and Visibility Attributes Up/Cross-Selling Character

MAIN Additional Stock Availability Weight and Dimensions Handling Intangible Items

Main Information

Code: COOK/CERM/HOB
 EAN Code:
 MPN:
 Name: Ceramic 4 Plate Hob
 Electrical: Cooker
 Fuel: Electric


Short Description:

Prices:

	Sale Price		Strikethrough Price		Packing Unit	Discount
	Ex VAT	Inc VAT	Ex VAT	Inc VAT		
Price 1	120.00	144.00			1	
Price 2					1	
Price 3					1	
Price 4					1	
Price 5					1	
Price 6					1	
Price 7					1	
Price 8					1	
Price 9					1	
Price 10					1	

Item Family:
 Eco-Tax (Inc VAT):
 VAT Rate: UK - Standard Rate (20.0%)
 Cost (Ex VAT):

Order a product with the user, which will be associated to the Euro currency. The product will be displayed in Euro, as shown below:

Order #15182628 

7 Apr 2016

Customer Information

Ms. Emile Mieville (emile@nanteshs.com.fr)
Nantes Home Stores (Fr)
Phone: +33 2 40 44 59 00
Fax: 33 02 40 44 59 34

Address

567 Rue de Valmy
BP 90 561
Nantes cedex 4
France
FCity, 44309
France Metropolitan

Shipping Method

UPS

Payment Method

Use Customer Account

Details

<i>Items</i>	<i>Unit Price</i>	<i>Quantity</i>	<i>Amount</i>
Ceramic 4 Plate Hob (Code: COOK/CERM/HOB) Electrical : Cooker Fuel : Electric	120.00 €	1	120.00 €
Subtotal			120.00 €
Shipping & Handling UPS			8.00 €
VAT			25.60 €
Total			153.60 €

Base Price (Excl. VAT)	VAT Rate	VAT Amount
120.00	20	24.00

Download this order in the DataPlug and transfer it to Sage 200c.

By looking at the generated order, you can notice that the item keeps the Oxatis website's currency, but a change rate appears.

The screenshot shows the 'Amend Order' window with the following details:

Account Selection: Customer account selected. Code: NAN001, Short name: Nantes, Postcode: 44309, Name: Nantes Home Stores (Fr), By default supply from: WAREHOUSE.

Order Detail: Order no: 000005295, Order status: Live, Document date: 07/04/2016, Date requested: 07/04/2016, Date promised: 07/04/2016, Customer order no: Ox_Doc_15182628.

Item	Description	Quantity	Unit Price	Disc. %	VAT Rate	Gross
COOK/CERM/HOB	Ceramic 4 Plate Hob	1,00000	120,00000	0,00	EU Std Rate	120,00
Carriage	Carriage	1,00000	8,00000	0,00	EU Std Rate	8,00

Exchange Rate: Rate: 1,637023, Currency: Euro.

Subtotals: Goods: EUR 120,00, Charges: EUR 8,00, Order disc: EUR 0,00.

Totals: Net: EUR 128,00, VAT: EUR 25,60, Gross: EUR 153,60.

The name and the price of the product are the ones from the Oxatis Order.

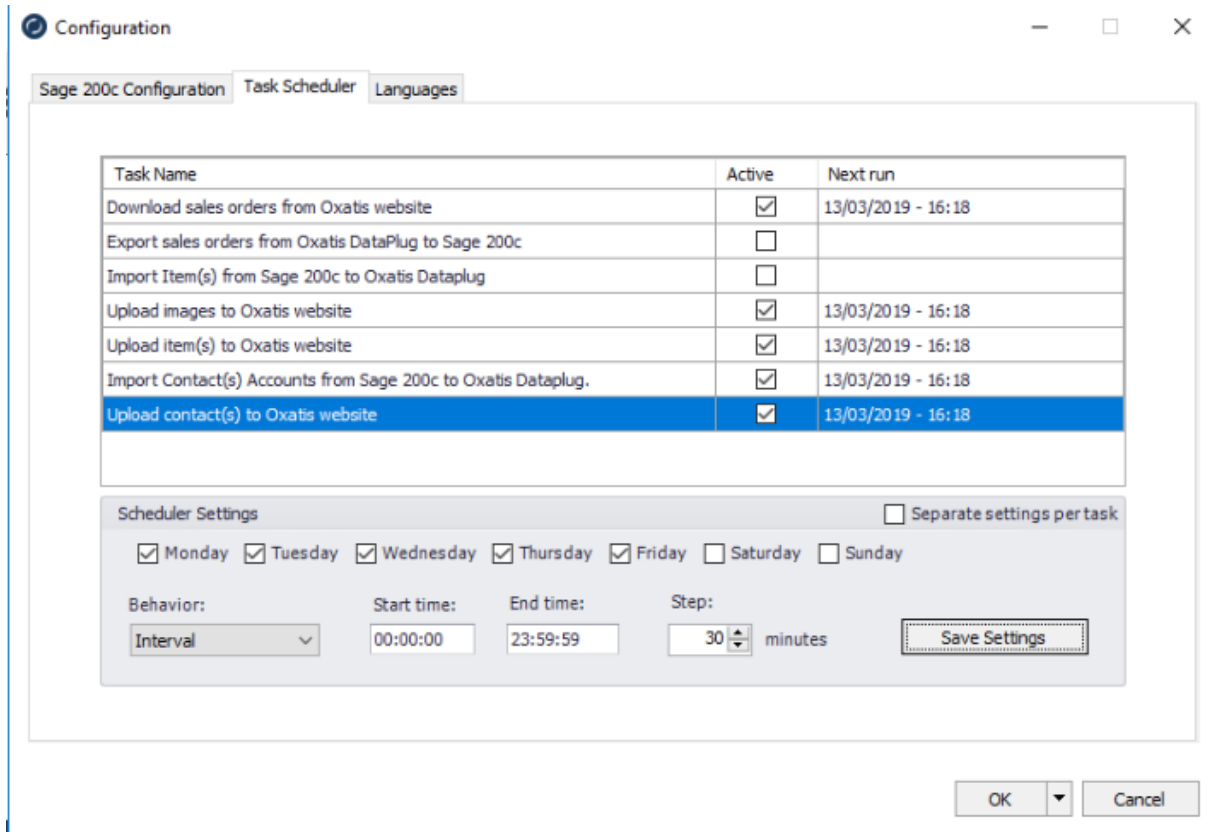
The item's currency is Euro and its change rate as filled in the Sage 200c file is shown.

18. Task Scheduler

All previously documented tasks (import of Sage data, upload to Oxatis, order download and export to Sage, etc.), can be scheduled for automatic execution.

To schedule these tasks, go to the DataPlug menu: **Connectors** | **Link for Sage 200c** | **Configuration**, then select the **Task Scheduler** tab.

In this tab, you can schedule your tasks.



To do so:

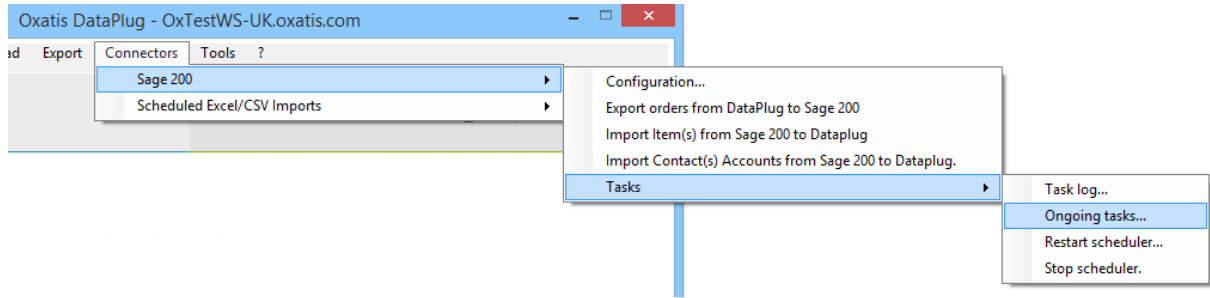
- ✓ Enable at least one of the available tasks.
- ✓ Enable at least one day of the week.
- ✓ Define the start and end times for your schedule (all the time by default).
- ✓ Define an execution interval in minutes (15 minutes by default).

Once set, the tasks that have been enabled in the scheduler will be automatically executed in the background.

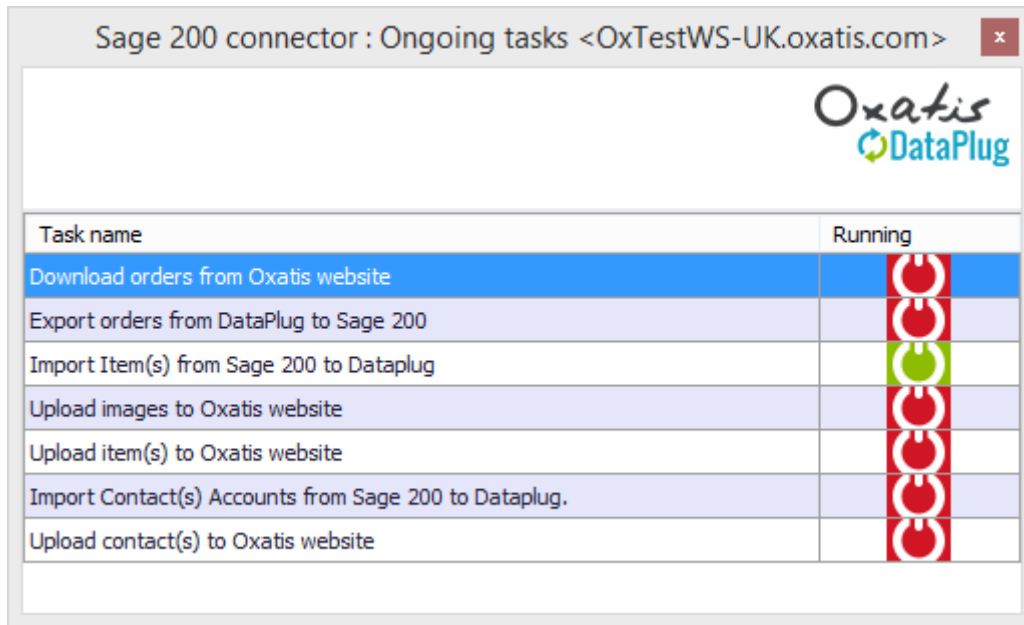
Note: Tasks are executed in a predefined order:

- 1) Sage product import to DataPlug.
- 2) Sage customer/contact import to DataPlug.
- 3) Images upload to Oxatis.
- 4) Products upload to Oxatis.
- 5) Customers/contacts upload to Oxatis.
- 6) Oxatis orders download to DataPlug.
- 7) Orders export from DataPlug to Sage.

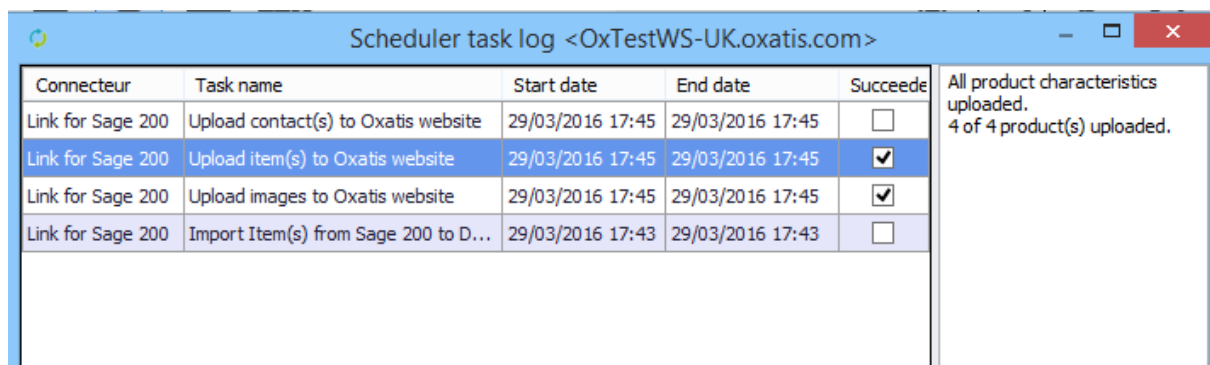
*Below: If the scheduler is enabled, you can consult the tasks being executed and a log of previously executed tasks in the following menu: **Connectors** | **Link for Sage 200c** | **Tasks** | **Ongoing tasks**.*



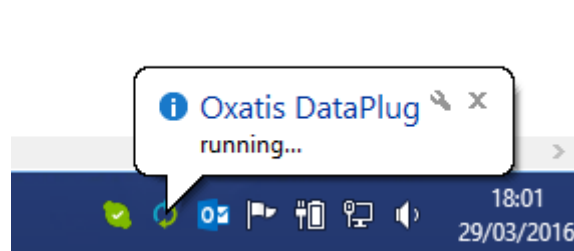
Below: Consultation of tasks being executed by the scheduler (enabled tasks are running in green).



Below: Consultation of the scheduler task log.



Below: You can close the DataPlug (from the red x in the main window, and not from the File menu) and leave it running in the background. An icon will appear in the Windows task bar.



Right-click on the DataPlug icon. A pop-up menu will appear and allow you to:

- Open the DataPlug.
- Quit the DataPlug.

