Oxatis *Data*Plug

User Guide
Link for Sage 50 Accounts

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Summary

Link for Sage 50 Accounts

1. General

- To install Oxatis DataPlug, Microsoft .net Framework 4.5 is required.
- To activate the DataPlug Link for Sage 50 Accounts, the following is required:
  - ✓ Installation of Sage 50 Accounts software.
  - ✓ Activation of SDO (Sage Data Objects) for Sage 50 Accounts.

  For more details or to obtain your 3rd party activation key, contact Sage at:
  - support@sage.com
 - 0845 111 55 11

2. Link for Sage 50 Accounts Settings

In the DataPlug, select the **Connectors** | **Link for Sage 50 Accounts** | **Configuration** menu.
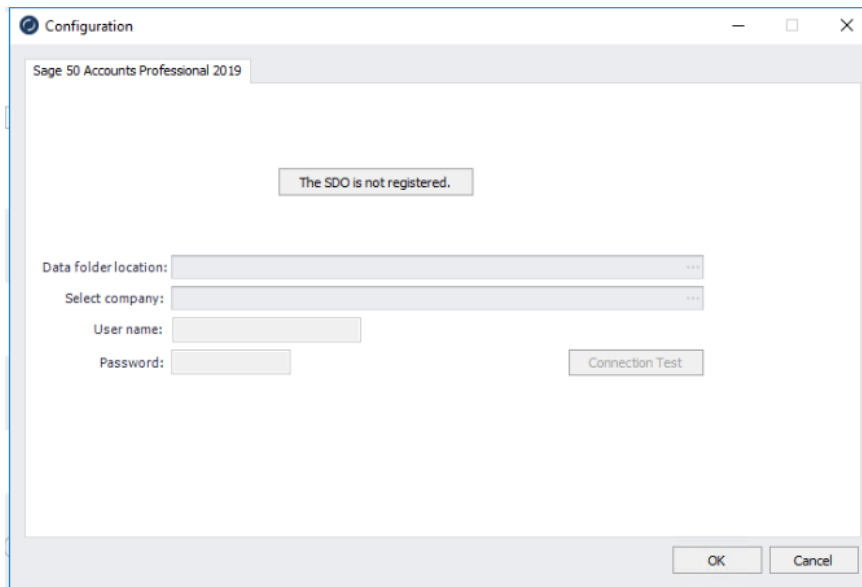
If the SDO (Sage Data Objects for Sage 50 Accounts) has not been registered, there are two ways to do so:

➢ Either by clicking on the "**The SDO is not registered**" button. A pop-up window will prompt you to enter the Serial Number and Activation Key:
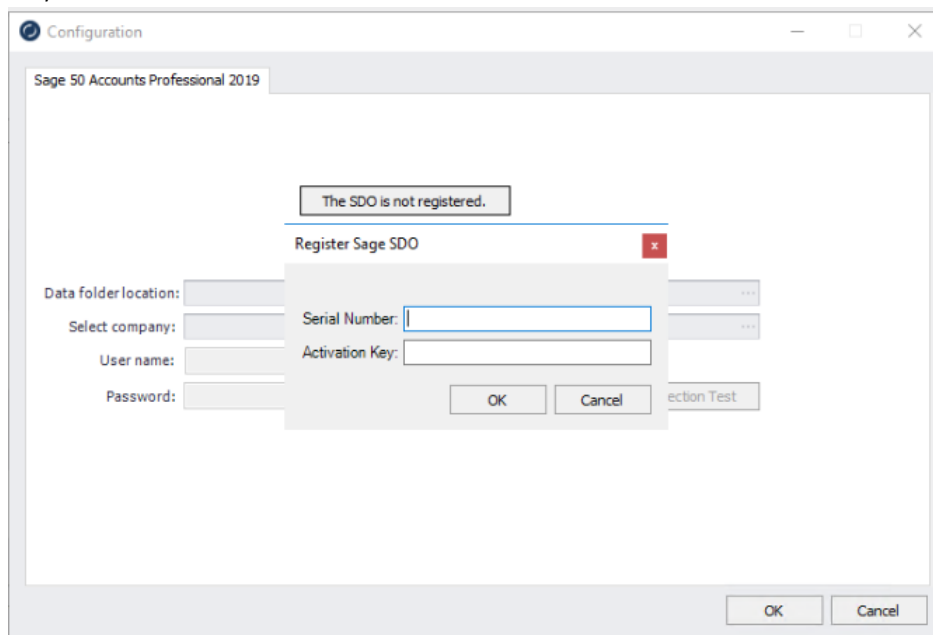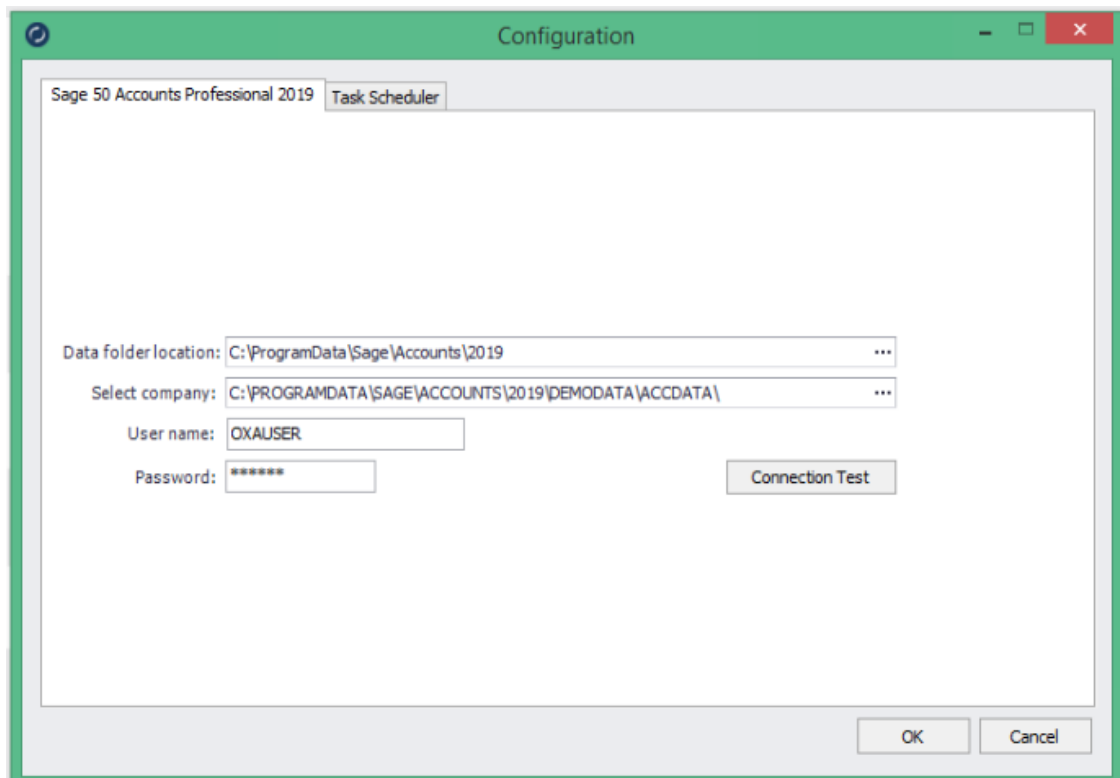
➢ Or from the "Sage 50 Accounts" software: Go to **Tools** | **Activation** | **Upgrade Program**. You will be prompted for the Serial Number and Activation Key for the SDO.
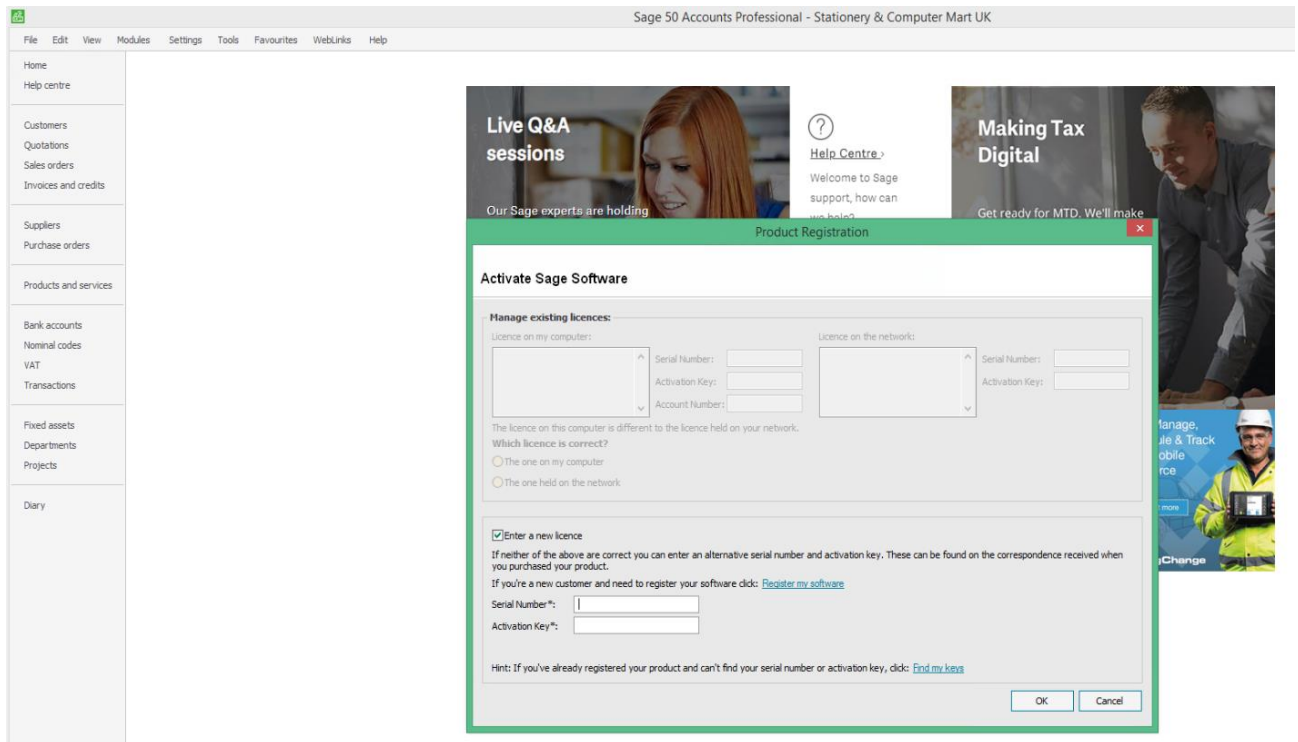
In the window below back in the DataPlug, you will have to configure the following:

- The data folder location for Sage 50 Accounts,
- Select company,
- The user name,
- And password.

3. Creating Products, Images and Customers in Sage 50 Accounts

We have created various products and a customer for a new company in the Sage 50 Accounts software.

- Products

  Below is a list of products created in Sage 50 Accounts.

Below is an example of the details of product "CDR002" in Sage 50 Accounts:

Note: Category B in Sage 50 Accounts above includes the "\" character, which will create the "CD" category and the "DVD Drives" sub-category on the website.

Link for Sage 50 Accounts

- Customers

We have also created a customer with the following content in Sage 50 Accounts:

Main customer details:

Customer delivery address:

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

1. The Link for Sage 50 Accounts 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 50 Accounts)
   ✓ VAT rate is equal 0%, 5% or 20%
   ✓ Product code length less than or equal to 20 characters

2. Below are the Oxatis fields that are automatically mapped by the Link for Sage 50 Accounts:

| Oxatis	Sage 50 Accounts
Code	Product Code
Name	Description
Quantity in Stock	In Stock or Free stock
Reorder threshold	Re-order level
VAT Rate	Tax value associated to tax code
Description	Web Defaults Description
Detailed description	Web Defaults Details
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	Category A (Web Defaults | Custom Fields)
Category 2	Category B (Web Defaults | Custom Fields)
Category 3	Category C (Web Defaults | Custom Fields)
EAN Code	Bar Code
Cost	Last Cost Price

3. Importing products to the DataPlug:

   Click on the following menu in the DataPlug: **Connectors** | **Link for Sage 50 Accounts** | **Import** **Products***.*
   You will then be guided through the configuration of the data to import.
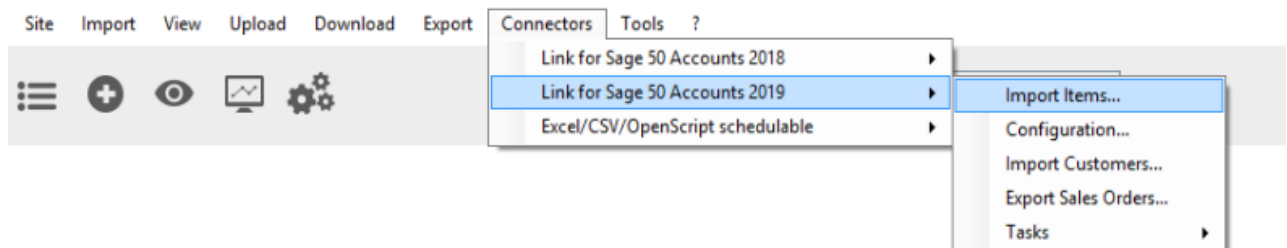
Data transfer to Oxatis

1st step: *You can select:*

- *A range of product codes.*
- *A range of product categories.*
- *Item Type: Stock, Non-Stock or Service.*
- *Source of stock: Oxatis stock field may be linked with "In stock" field from sage or "Free stock"*

2nd step: *The image associated to the product in Sage 50 Accounts can be retrieved and used as the main image in the Oxatis product page and transformed for use as a thumbnail and zoom image if desired.*

3ʳᵈ step: *The number of records corresponding to the criteria defined in the selection are displayed before the data is imported into the DataPlug.*
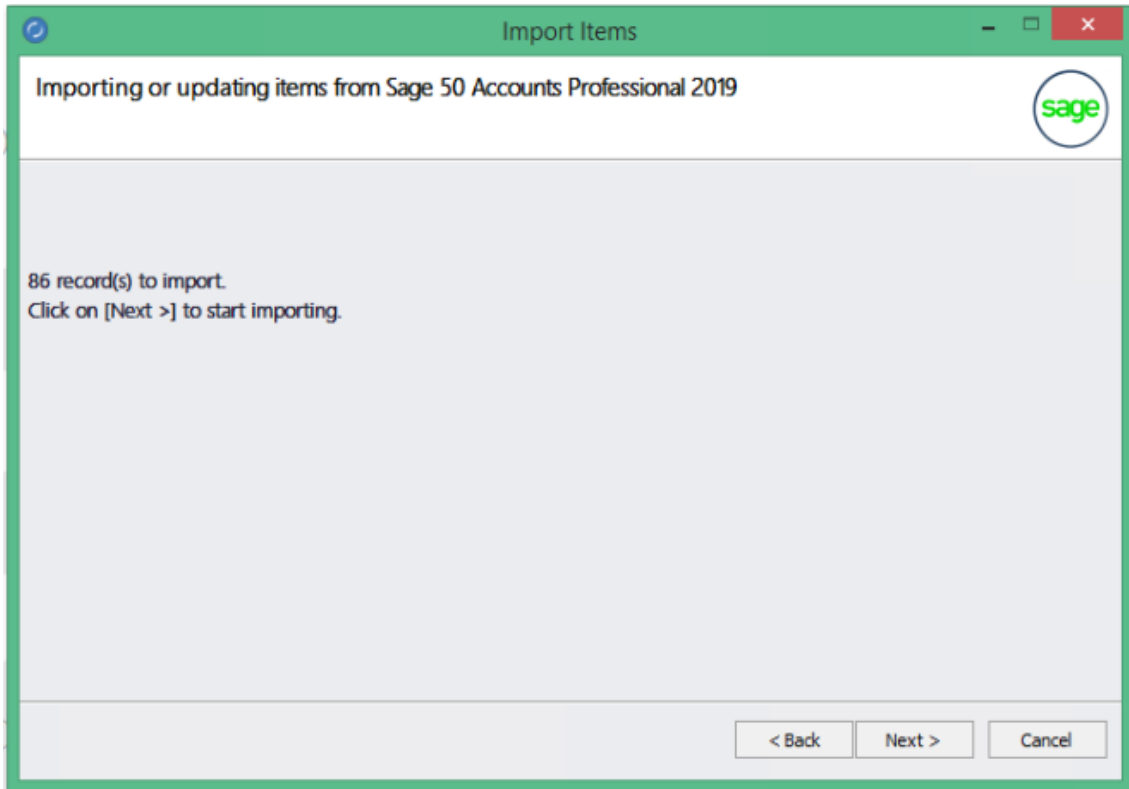

Last step: *The import of products from Sage 50 Accounts is complete. The number of products that were imported or updated in the DataPlug database is displayed in the results. By clicking on the "Finish" button, all of the import settings (product selection criteria) are saved.*
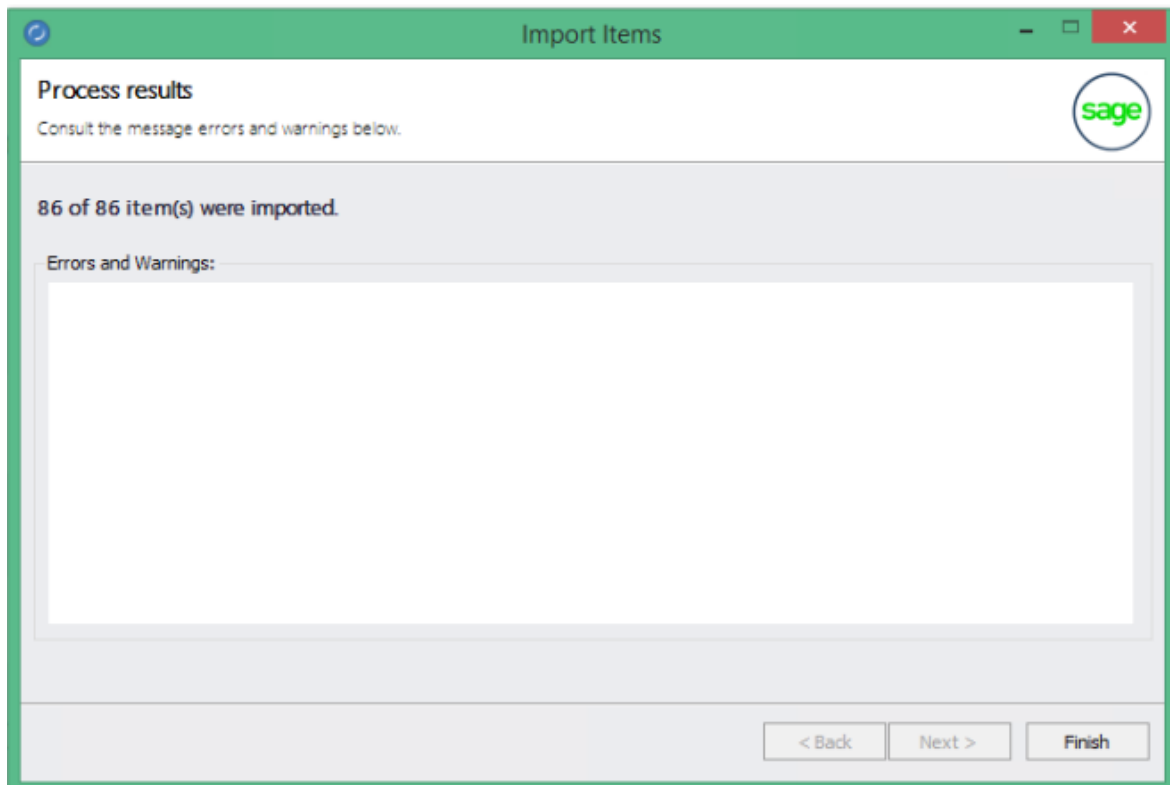
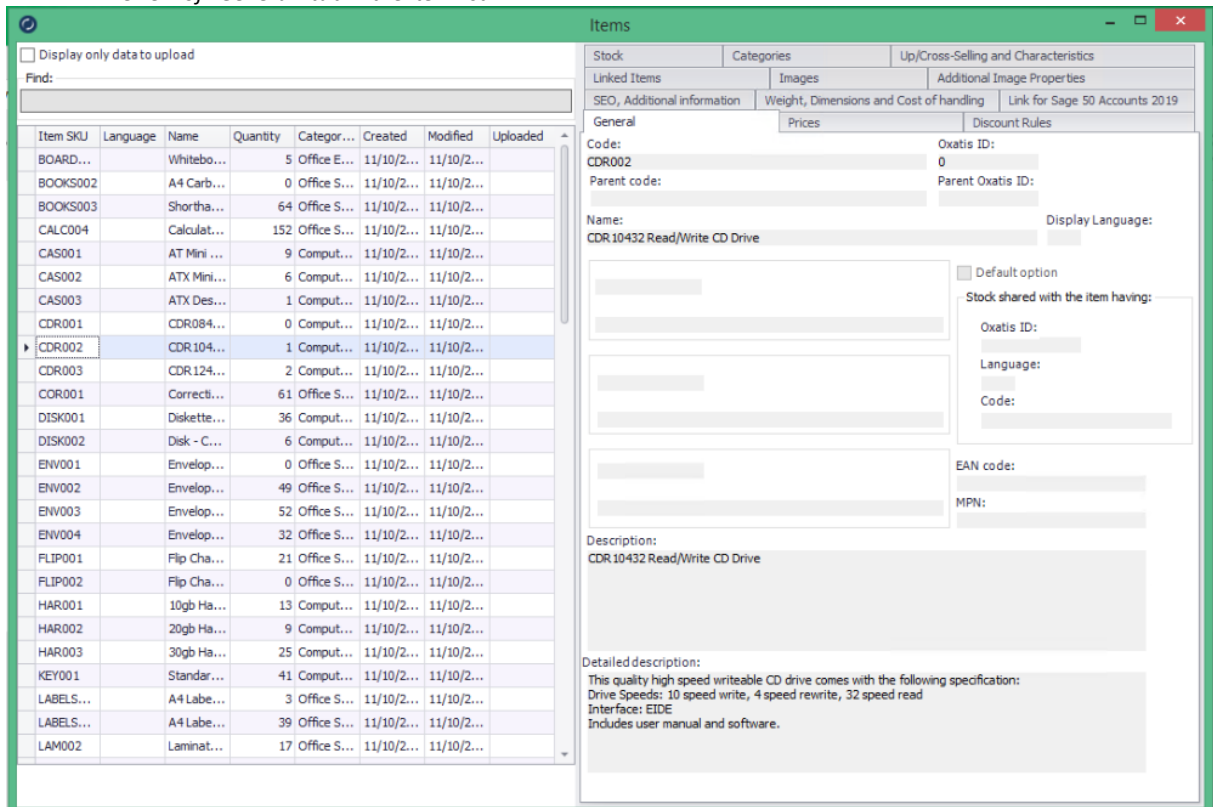## 5. Viewing Products Imported from Sage 50 Accounts

Once products have been imported from Sage 50 Accounts, the main screen of the DataPlug is refreshed and displays the number of products (88) and images (222) imported or updated in the DataPlug database.

*You can view this data in the __View__ | **Items** menu before uploading it to your Oxatis website.*
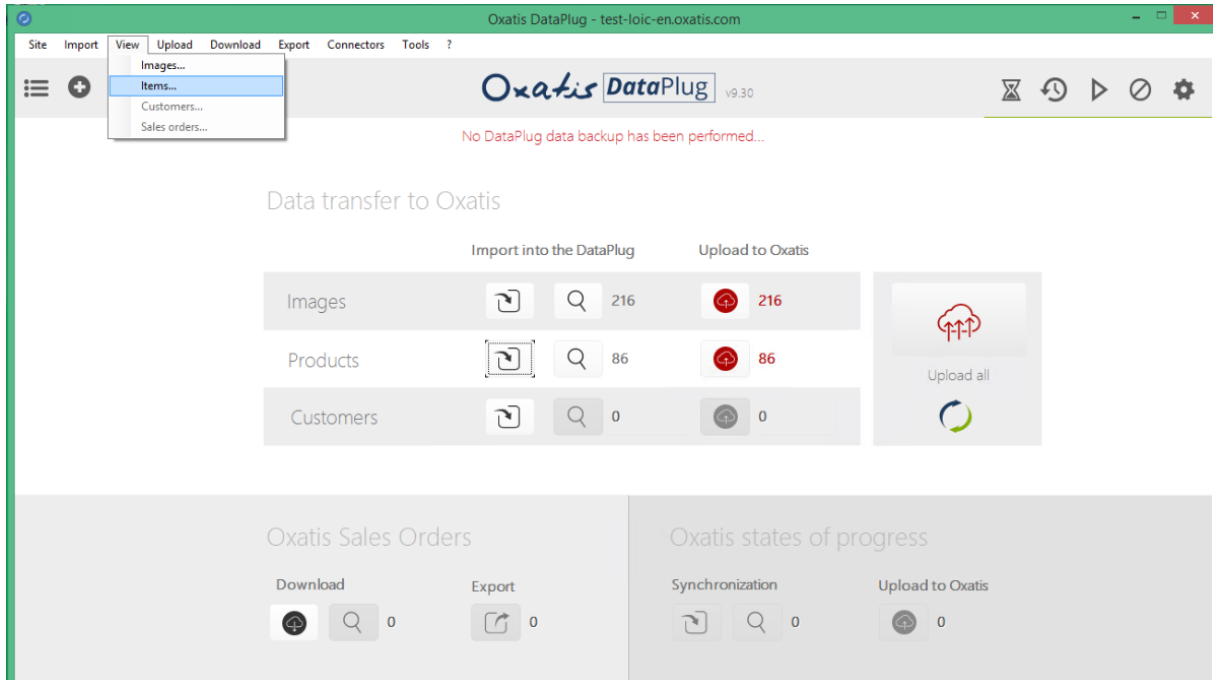
Preview of "General" tab in the item list.

Preview of the "Images" tab in the item list.

*Preview of the "Categories" tab in the item list.*

6. Importing Customers

1. The DataPlug Link for Sage 50 Accounts allows you to import customers and contacts, provided that the files contain an email address.

2. Below are the Oxatis fields that are automatically mapped by the Link for Sage 50 Accounts:

Oxatis	Sage 50 Accounts
Last Name	Contact name
Email	Email
Company	Company name
VAT Reg No	VAT Number
Phone	Contact Telephone
Secondary Phone	Contact Telephone 2
Fax	Contact Fax
Subscribed to Newsletter	I send letters, statements, etc to this customer via email
Subscribed to SMS Marketing	I send letters, statements, etc to this customer via email
Address	Street1 + Street2
Postal Code	Post Code
City/Town	Town
State/County	County
Country	Country
Company (Shipping Address)	Company name (Delivery address)
Shipping Address	Street1 + Street2 (Delivery address)
Postal Code(Shipping Address)	Post Code (Delivery address)
City (Shipping Address)	Town (Delivery address)
State(Shipping Address)	County (Delivery address)
Country (Shipping Address)	Country (Delivery address)
Phone (Shipping Address)	Phone (Delivery address)
Discount	Discount %

3. Importing customers:

Click on the following menu in the DataPlug: **Connectors | Link for Sage 50 Accounts | Import Customers**.
You will then be guided through the configuration of the data to import.
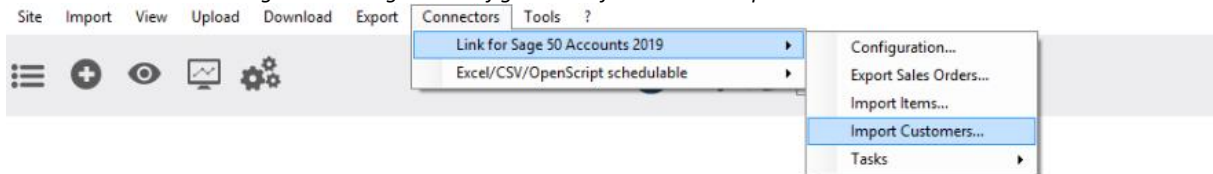
1st step: *You can select:*

- *A range of Account Customer codes.*
- *A range of Account Status.*
- *Check the Billing phone numbers*

2nd step: *The number of records corresponding to the criteria defined in the selection is displayed before the data is imported into the DataPlug.*


1st step: *You can select:*

- *A range of Account Customer codes.*
- *A range of Account Status.*
- *Check the Billing phone numbers*

Link for Sage 50 Accounts

Last step: *The import of customers from Sage 50 Accounts 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.*
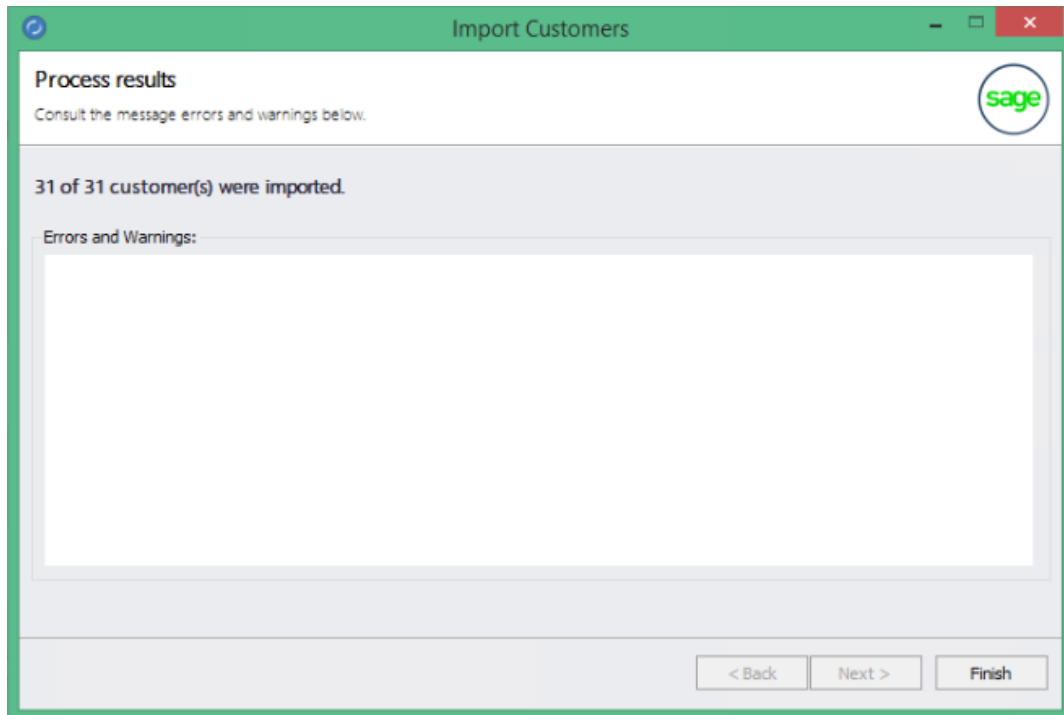
7. Viewing Customers Imported from Sage 50 Accounts

Once users have been imported from Sage 50 Accounts, the main screen of the DataPlug is refreshed and displays the number of customers or users (1) imported or updated in the DataPlug database.

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

Link for Sage 50 Accounts
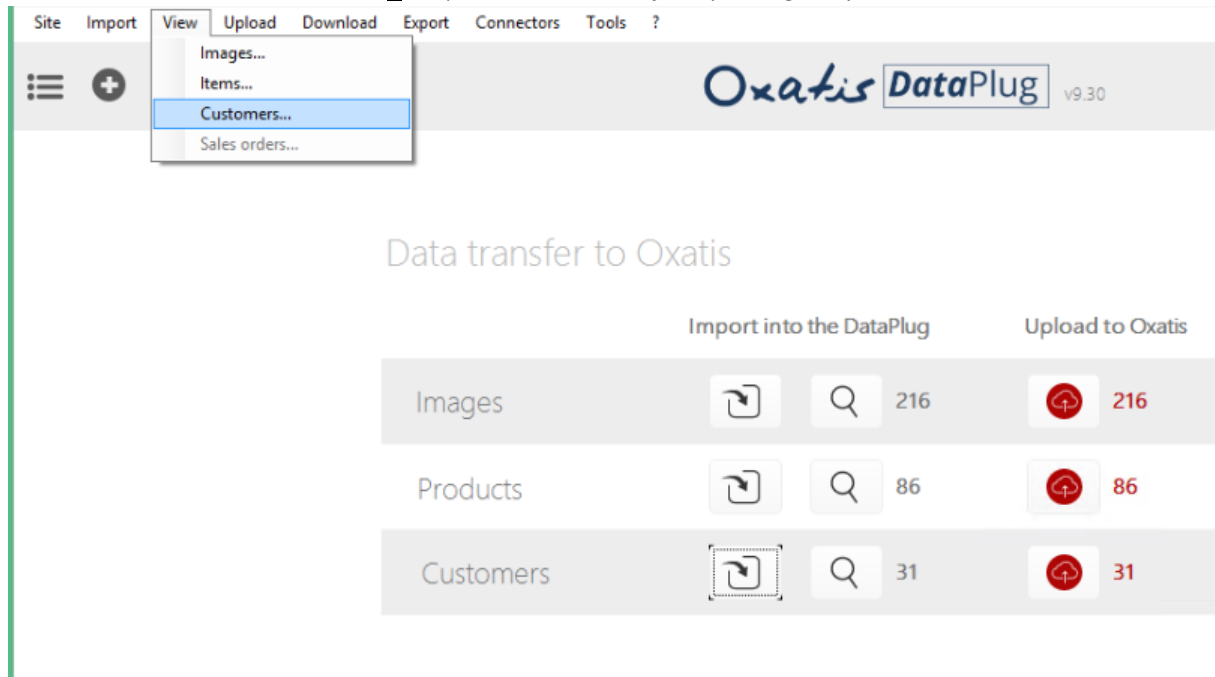
Preview of "Main Information" tab in the user list of the DataPlug.

Note: You will find the Sage 50 Accounts customer code in the customer reference field.

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

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

Data from Sage 50 Accounts can be uploaded from the DataPlug to Oxatis separately (Products, Images, Users) or all at once from the DataPlug menu: **Upload** | **All**.
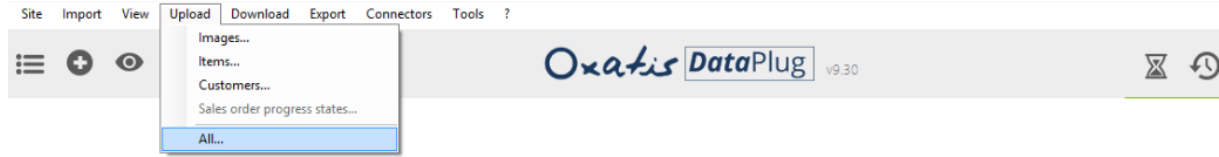
The total number of records (Images, Products and Users) to be uploaded to Oxatis is displayed before the data is uploaded.
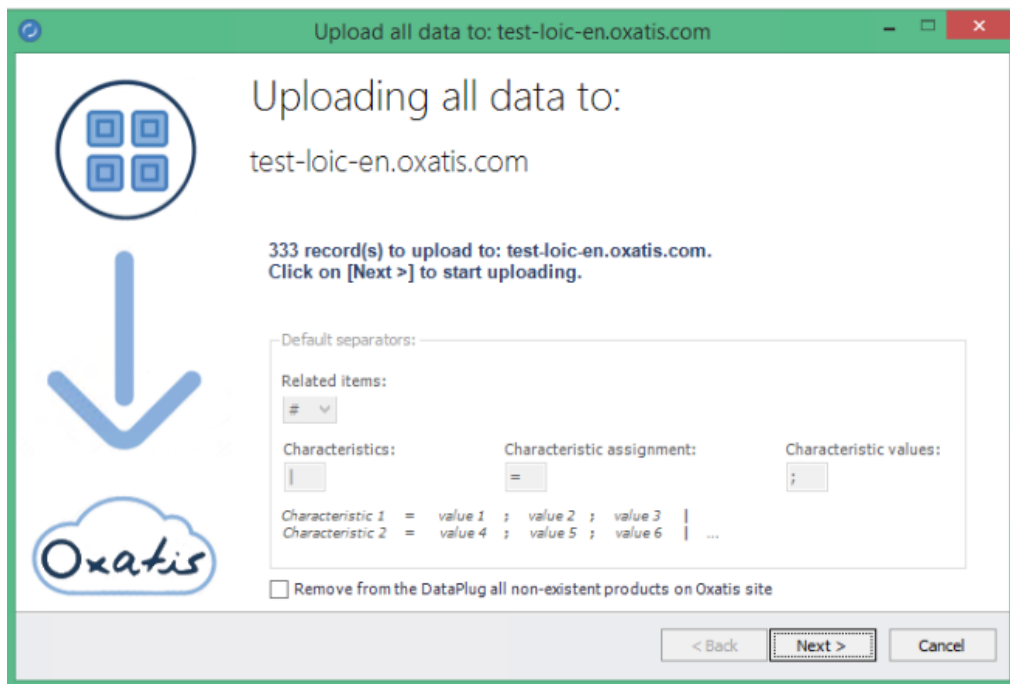
Click on "**Next**" to upload the data to the Oxatis site.
You can cancel the upload at any time and send the remaining data at a later date.
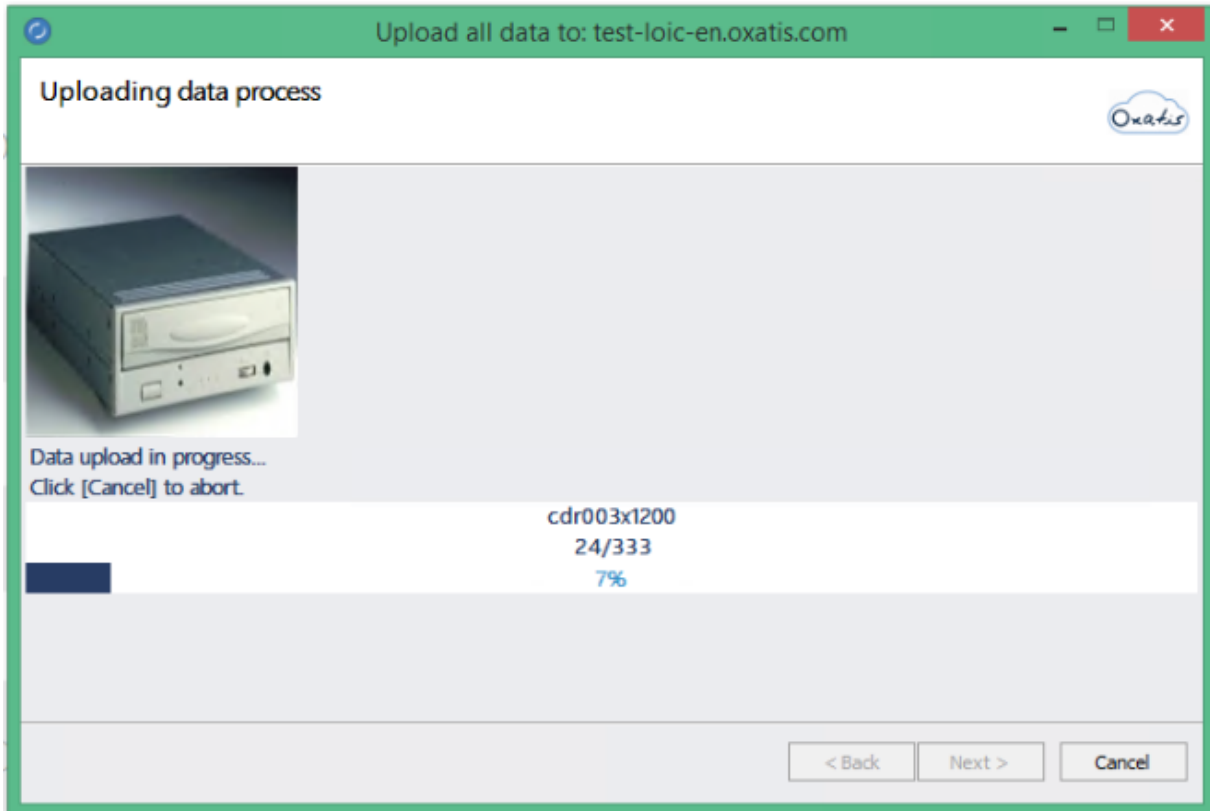
Once the upload is complete, the number of records (Images, Products and Users) that were uploaded to the Oxatis site will be displayed.

9. Viewing Data Uploaded to the Oxatis Site

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

Below is a preview of the uploaded customers.

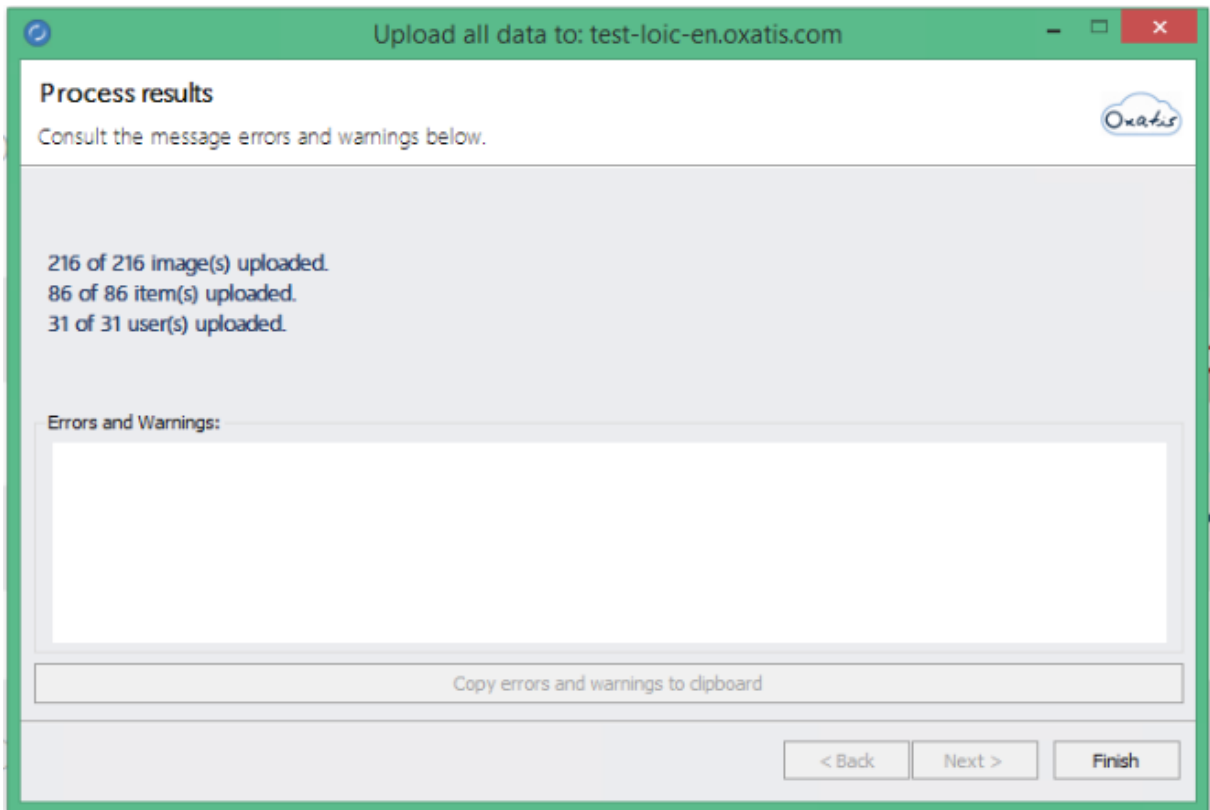|	Creation date	Last name	First name	Email	Language	Company
	11 October 2019			newbusinessadvice07@sage.com		Cash and Credit Card Sales
	11 October 2019	Ahmed Roumani		newbusinessadvice21@sage.com		Picture Frame Ltd
	11 October 2019	Alistair Leadbetter		newbusinessadvice13@sage.com		Hausser GMBH
	11 October 2019	Arsene Wenger		arsenal@oxatis.com		Arsenal
	11 October 2019	Clint Peddie		newbusinessadvice12@sage.com		Graham Electonics
	11 October 2019	David Bradford		newbusinessadvice11@sage.com		F G Landscape & Design
	11 October 2019	Edward Stuart		newbusinessadvice27@sage.com		Edward Stuart
	11 October 2019	First Sean Morris		newbusinessadvice09@sage.com		Compton Packaging
	11 October 2019	Fred Briant		newbusinessadvice04@sage.com		Fred Briant
	11 October 2019	Ian Cairns		newbusinessadvice01@sage.com		A1 Design Services

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

Note: As you can see from our first example, the "DVD Drives" sub-category has been created and is attached to the "CD" parent category.

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

Below is a preview of the products uploaded with their respective images.
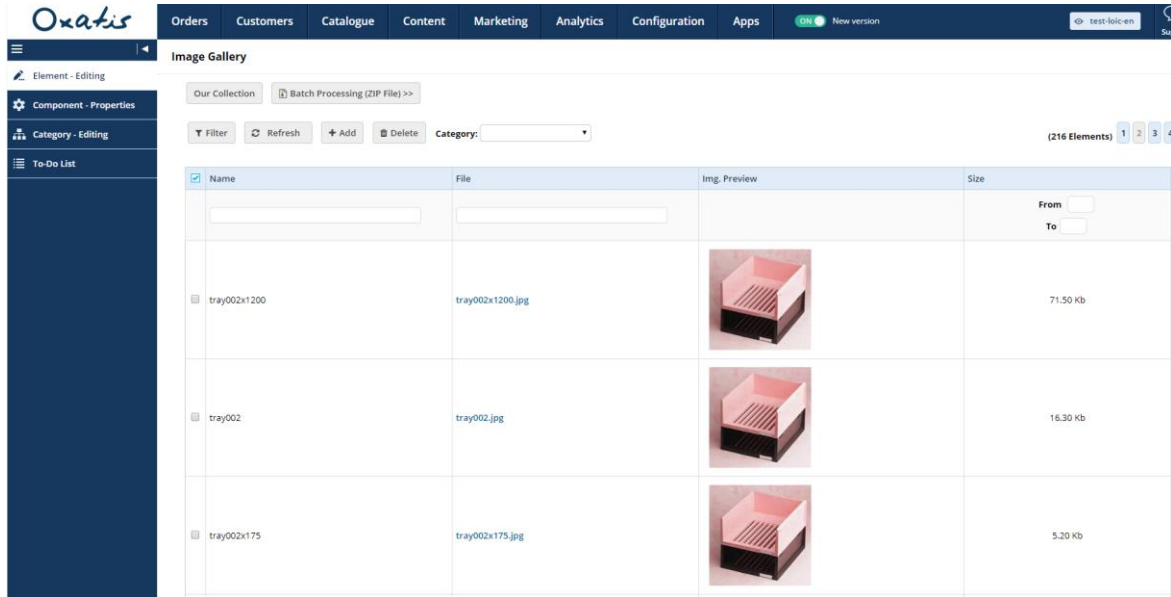
Below is the detailed product information for product code "CDR002":

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

Product Long Description

Product : CDR10432 Read/Write CD Drive - Properties

‹ Back | Edit | Duplicate | Delete

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

Main | **ADDITIONAL** | Stock | Availability | Weight and Dimensions | Handling | Intangible products

Additional Information

Detailed Description: This quality high speed writeable CD drive comes with the following specification:
Drive Speeds: 10 speed write, 4 speed rewrite, 32 speed read
Interface: EIDE
Includes user manual and software.
Brand: [None]
Discount Grid:
Product Condition: New
Guarantee:

Navigation Behaviour

Type of Behaviour: Do nothing

Product Quantity in Stock and Re-order Level

Product : CDR10432 Read/Write CD Drive - Properties

‹ Back | Edit | Duplicate | Delete

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

Main | Additional | **STOCK** | Availability | Weight and Dimensions | Handling | Intangible products

Stock

Quantity in Stock: 1 Unit(s)
Low Stock Level: 5 Unit(s)
Product in stock (Quantity in stock > 0):
☐ Show that product is in stock (Example: "In Stock")
☐ Show stock level (Example: "4 product in Stock")

Product Weight

Product : CDR10432 Read/Write CD Drive - Properties

‹ Back | Edit | Duplicate | Delete

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

Main | Additional | Stock | Availability | **WEIGHT AND DIMENSIONS** | Handling | Intangible products

Weight and Dimensions

Weight: 0 Gram(s)
Height: 0 Centimeter(s)
Width: 0 Centimeter(s)
Length: 0 Centimeter(s)

Product Images (Main, Thumbnail and Zoom)

Orders	Customers	Catalogue	Content	Marketing	Analytics	Configuration	Apps

Product : CDR10432 Read/Write CD Drive - Properties

‹ Back   Edit   Duplicate   Delete

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

ASSOCIATED IMAGE(S)

Main Image

Thumbnail

Additional Images

 Edit Additional Images ...

Product Categories

Orders	Customers	Catalogue	Content	Marketing	Analytics	Configuration	Apps	ON ⬤ New version

Product : CDR10432 Read/Write CD Drive - Properties

‹ Back   Edit   Duplicate   Delete

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

CATEGORY CLASSIFICATION

Category Classification

Category 1: Computer Hardware
Category 2: CD \ DVD Drives
Category 3:

Link for Sage 50 Accounts

10. Example of 2 Orders Placed on the Oxatis site

Two orders have been placed for Sage data that was uploaded to the site from the DataPlug.
The first order (No. 27112123) has been billed including VAT, the second order (No. 27112069) has been billed excluded VAT.

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

Below is a preview of the order including VAT with a global discount of 10% and payment by check.

Order #27112123

11 Oct 2019

Customer Information
Mr Stephen Baker (newbusinessadvice22@sage.com)
Robertson Joinery (GB311 1284 34)
Phone: +44 191 789 2323
Fax: 0181 789 3434

Billing Address
599 Church Road
Hounslow, Middlesex TW8 7TY
United Kingdom

Shipping Address
Mr Stephen Baker
Robertson Joinery
Phone: +44 191 789 2323
599 Church Road
Hounslow, Middlesex TW8 7TY
United Kingdom

Shipping Method
Royal Mail

Payment Method
Check

Details

Items	Unit Price	Quantity	Amount
ATX Mini Tower Case (Code: CAS002)	£ 24.00	1	£ 24.00
CDR12432 Read/Write CD Drive (Code: CDR003)	£ 267.60	1	£ 267.60
Disk - CDR (640MB) (Code: DISK002)	£ 9.60	1	£ 9.60
Subtotal before discount			£ 301.20
Discount (10.00%)			- £ 30.12
Subtotal			£ 271.08
Shipping & Handling Royal Mail			£ 26.40
Total			£ 297.48

Base Price (Excl. VAT)	VAT Rate	VAT Amount
225.90	20%	45.18

Below is a preview of the order excluding VAT, including discounted individual products, a global discount of 10% and payment by wire transfer.

Order #27112069 🇬🇧   *11 Oct 2019*

Customer Information
Mr Peter Young (newbusinessadvice30@sage.com)
Peter Young
Phone: +44 191 789 2323

Billing Address
78 Turnberry Road
Welburry
Cardiff, C34 3TY
United Kingdom

Shipping Address
Mr Peter Young
Peter Young
Phone: +44 191 789 2323
78 Turnberry Road
Welburry
Cardiff, C34 3TY
United Kingdom

Shipping Method
Royal Mail

Payment Method
Wire transfer

Details

Items	Unit Price	Quantity	Amount
ATX Mini Tower Case (Code: CAS002)	£ 20.00	1	£ 20.00
CDR10432 Read/Write CD Drive (Code: CDR002)	£ 190.00	1	£ 190.00
Disk - CDR (640MB) (Code: DISK002)	£ 8.00	5	£ 40.00
		Subtotal before discount	£ 250.00
		Discount (10.00%)	- £ 25.00
		Subtotal	£ 225.00
		Shipping & Handling Royal Mail	£ 22.00
		VAT	£ 49.40
		Total	£ 296.40

| Base Price (Excl. VAT)	VAT Rate	VAT Amount
225.00	20%	45.00

11. Downloading Orders from the Oxatis site to the DataPlug

This involves downloading, or importing, customer orders from the Oxatis site and saving them in the DataPlug database.

*Click on the following menu in the DataPlug: **Download | Sales Orders.***
*You will be guided through the configuration of the customer orders to download.*
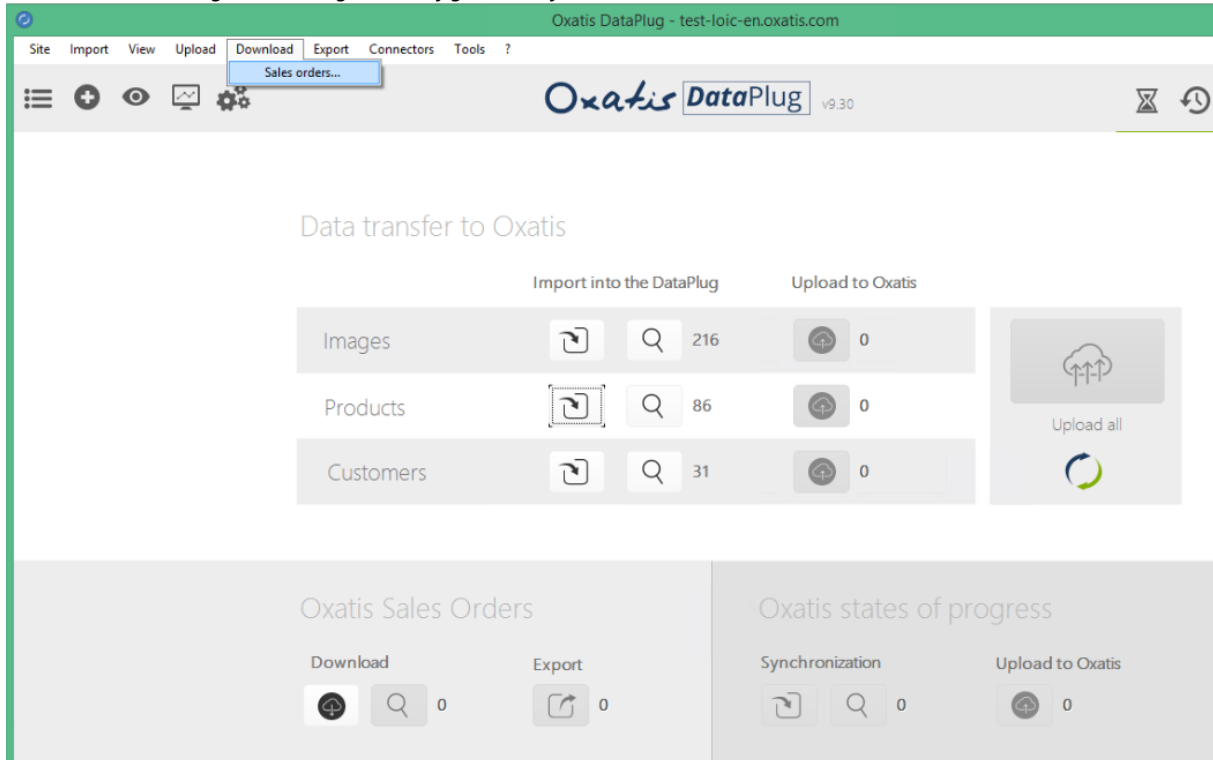
1st step: By default, the current day is proposed in the date range. However, you can select another date range.
Note: Only orders with a confirmed payment status are downloaded. However, you can select another payment status (Contacting Payment Processor, Payment in Process, or Payment Refused), as well as the date range related to the change of payment status.
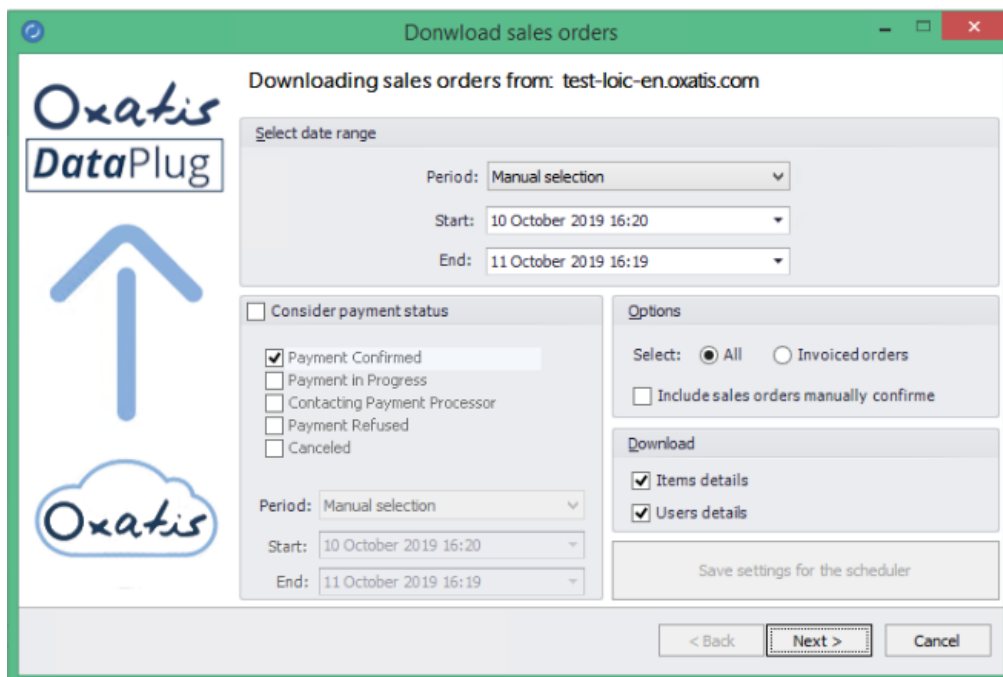
2ⁿᵈ step: *The number of orders to download is displayed. Click on the "Next" button to download the customer orders to the DataPlug.*
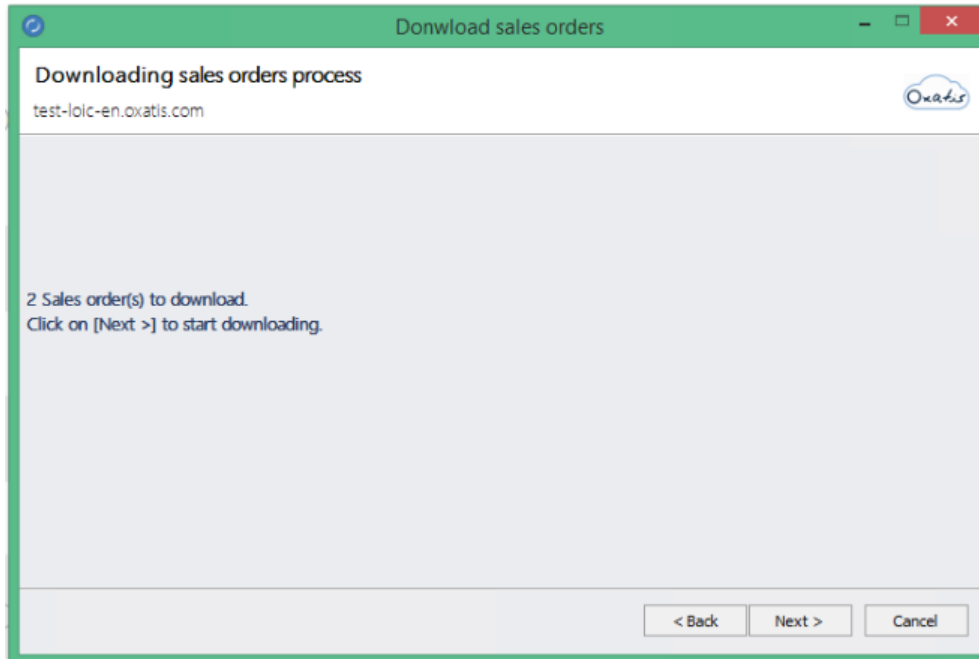
Once the download is complete, the number of orders that were downloaded into the DataPlug database will be displayed.
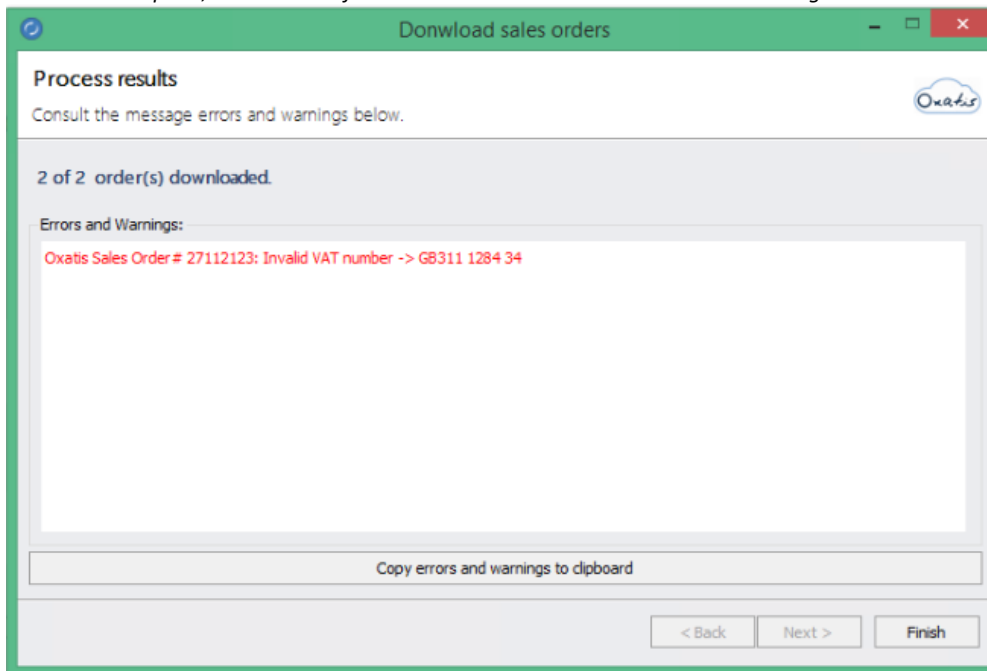
12. Viewing Orders Downloaded to the DataPlug

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 database.

*You can view this data in the **View** | **Sales Orders** menu before exporting it to Sage 50 Accounts.*

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

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

13. Export Customer Orders to Sage 50 Accounts

Exporting orders from Oxatis to Sage 50 Accounts entails creating new sales orders in the company's Sage 50 Accounts.

In the DataPlug, click on the menu: **Connectors** | **Link for Sage 50 Accounts 2016** | **Export** **Orders**
You will be guided through the necessary configurations to export your orders.
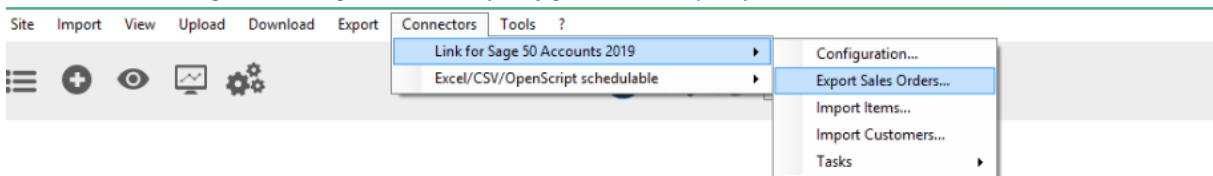
1st step: *By default, the DataPlug proposes to export all orders that have not yet been exported to Sage 50 Accounts.*

However, you can select:

- *A date range (with the option to export orders that have already been exported).*
- *The default nominal code for Carriage.*
- *The choice for allocated stock*

2nd step: *The product and customer assignment rules is displayed*

You can select:

- *The prefix for customer accounts to create in Sage 50 Accounts.*
- *The user code holding every B2C customer*
- *The rules for new address*
- *The rules for new products*

3ⁿᵈ step: *The Sales orders payment type and bank account mapping is displayed*
You can select:

- *The Bank account for local currency.*
- *The Bank account for foreign currency*
- *The mapping for Oxatis payment*

4ⁿᵈ step: *The number of orders to export is displayed. Click on the "Next" button to export the customer orders to the Sage 50 Accounts.*
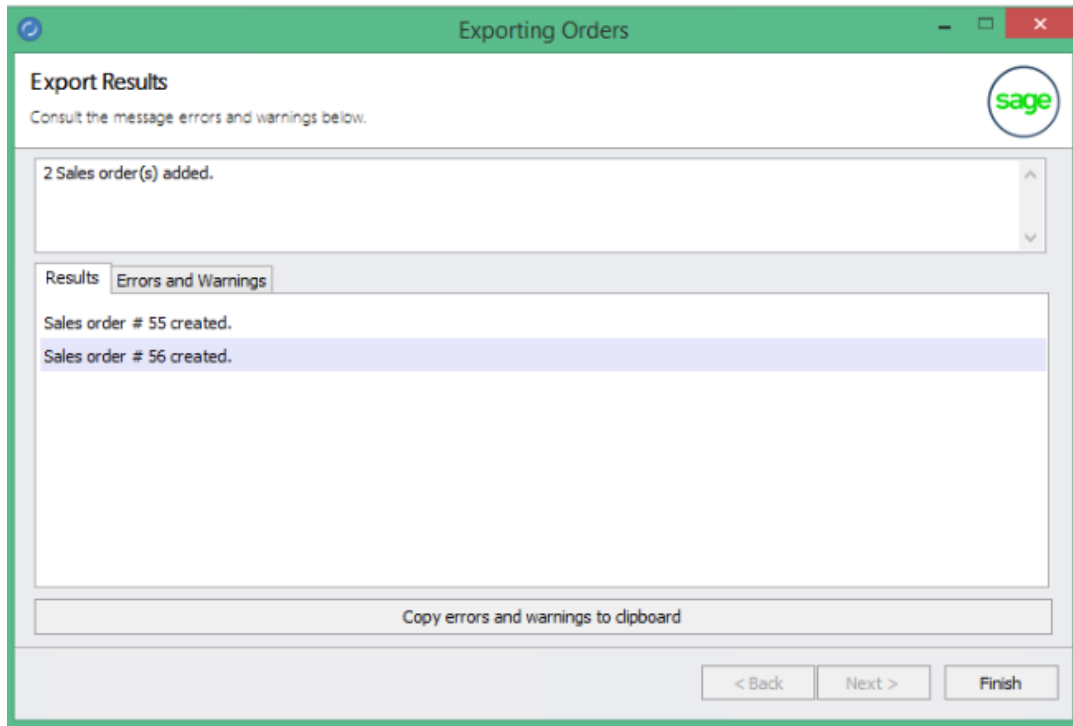
*Once the export is complete, the number of orders that were exported and customer accounts that were added to Sage 50 Accounts will be displayed.*

You can copy/paste the contents of the results tab to a document to consult the new records in Sage 50 Accounts. 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 50 Accounts

Link for Sage 50 Accounts
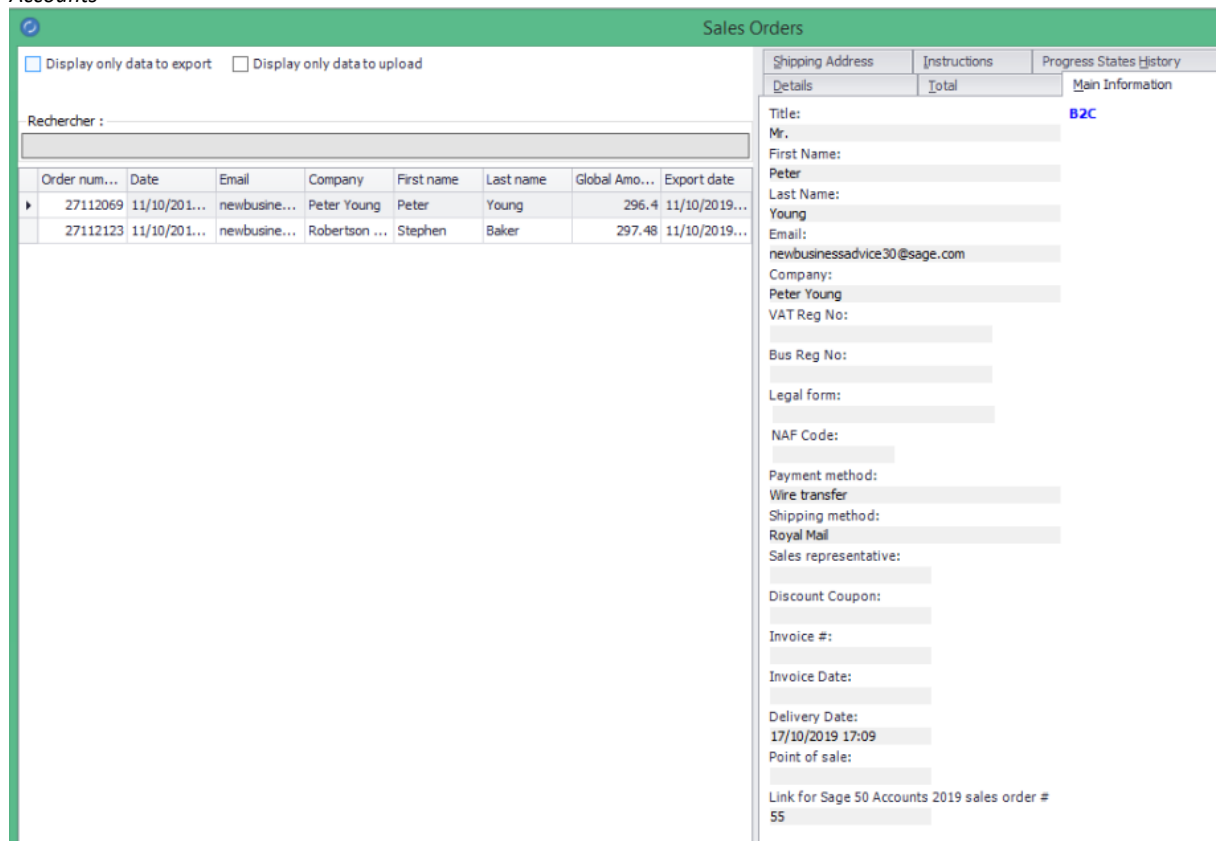
14. Viewing Sales Orders Imported to Sage 50 Accounts

- **View sales orders created by the DataPlug export**

  In Sage 50 Accounts, go to the menu: **Modules** | **Sales Orders**

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

Below is a preview of order No. 55 in Sage 50 Accounts.
You can see the two products in the order with their prices, excluding VAT, as well as the global discount of 10%, also excluding VAT.

Below is a preview of the details of the global discount excluding VAT.

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

Below: Delivery information, Special Instructions from the Oxatis order are shown in the Notes field in Sage 50 Accounts.

The Oxatis order number can be seen here in the "Customer Order No." field.
The origin of the order can also be seen here in the "Order Taken By" field, which in this case is the Oxatis website.

Below is the "Footer Details" tab, which includes carriage (shipping fees) and any associated tax.

Link for Sage 50 Accounts

Below is the "Payment Details" tab.

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15. Creating Customers in Sage 50 Accounts

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 50 Accounts.

The main tab in the user account.

Below is the billing address tab in the user account.

Customers : Paula Anderson - Update elements

| General | Categories | Visibility | Referrals | RFM customer rating | Tarifs |

Main | Additional | **ADDRESS** | Shipping Address | Address Book | Billing and Discounts

Address

Address:	37 Marylebone High Street
Town/City:	Picadilly
Country:	United Kingdom
County/State:	
Postcode:	SW1Y6DS

Below is the shipping address tab in the user account.

Customers : Paula Anderson - Update elements

| General | Categories | Visibility | Referrals | RFM customer rating | Tarifs |

Main | Additional | Address | **SHIPPING ADDRESS** | Address Book | Billing and Discounts

Shipping Address

Title:	Mr
First Name:	Gerald
Last name:	Mac
Company:	
Telephone:	+33 40 8411 1287
Address:	172 Edison Street
Town/City:	Chester
Country:	United Kingdom
County/State:	Cheshire
Postcode:	CH1 4PL

Exporting this customer's order will automatically create the customer account in Sage 50 Accounts:

Exporting Orders

Export Results

Consult the message errors and warnings below.

1 Sales order(s) added.
1 Customer(s) added.

Results | Errors and Warnings

Account Reference: OXAC1 created.

Sales order # 57 created.

Copy errors and warnings to clipboard

< Back | Next > | Finish

Link for Sage 50 Accounts

Below are the details of the new account 'OXAC1' created in Sage.

Below is the "Delivery Address" dialog box for the new customer account 'OXAC1'.

16. Task Scheduler

This feature can be accessed on request to Oxatis.
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 50 Accounts** | **Configuration**, then select the *Task Scheduler* tab.

In this tab, you can schedule your tasks.
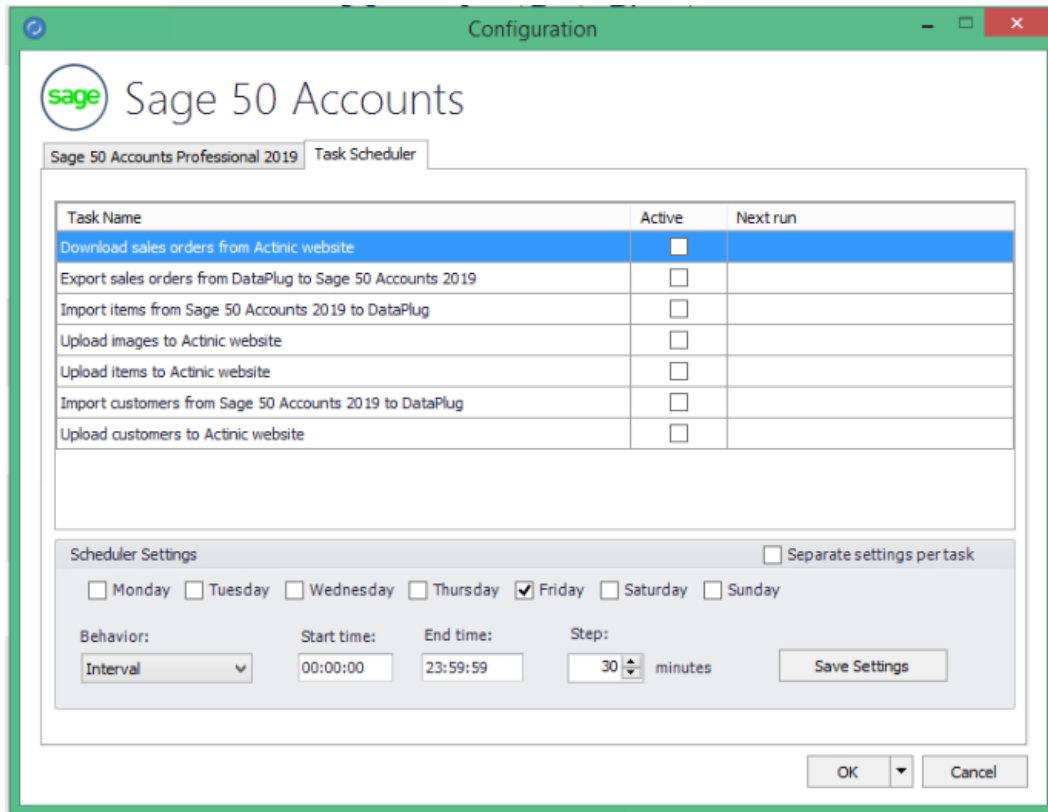

To do so:
- ✓ Enable at least one of the available tasks.
- ✓ Enable at least one day of the week.
- ✓ Define the start and end times for your schedule (all the time by default).
- ✓ Define an execution interval in minutes (15 minutes by default).

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

Note: Tasks are executed in a predefined order:
1) Oxatis order download to DataPlug.
2) Order export from DataPlug to Sage.
3) Sage product import to DataPlug.
4) Image upload to Oxatis.
5) Product upload to Oxatis.
6) Sage customer/contact import to DataPlug.
7) Customer/contact upload to Oxatis.

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 50 Accounts** | **Tasks**| **Outgoing tasks**.
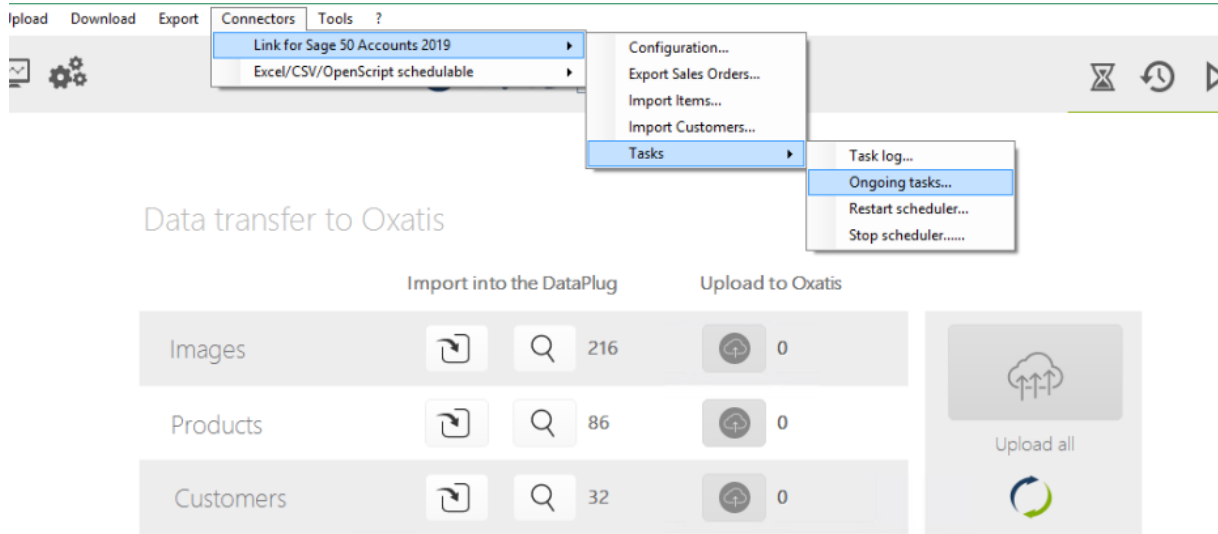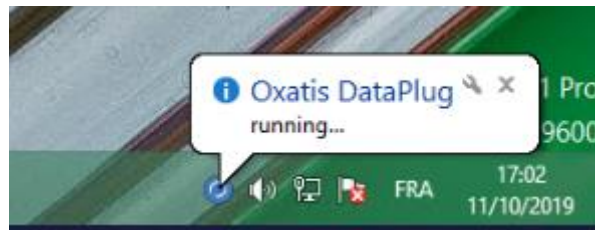

Below: Consultation of tasks being executed by the scheduler (enabled tasks are running in green).

Link for Sage 50 Accounts
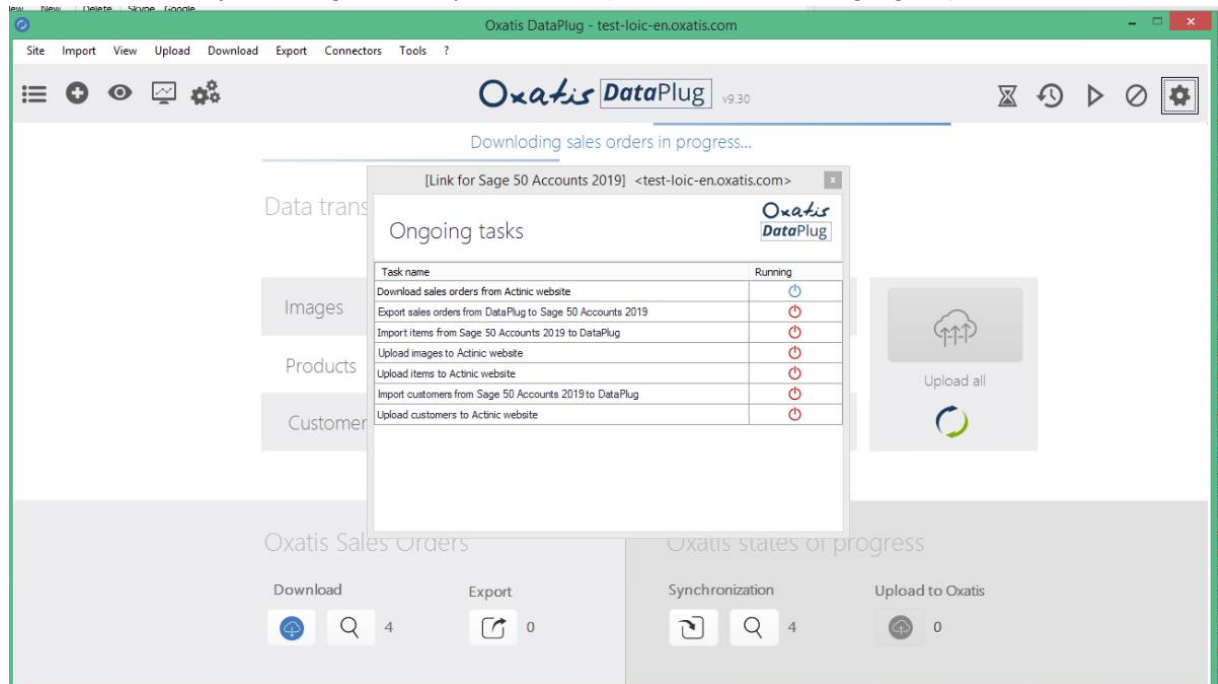
Below: Consultation of the scheduler task log.
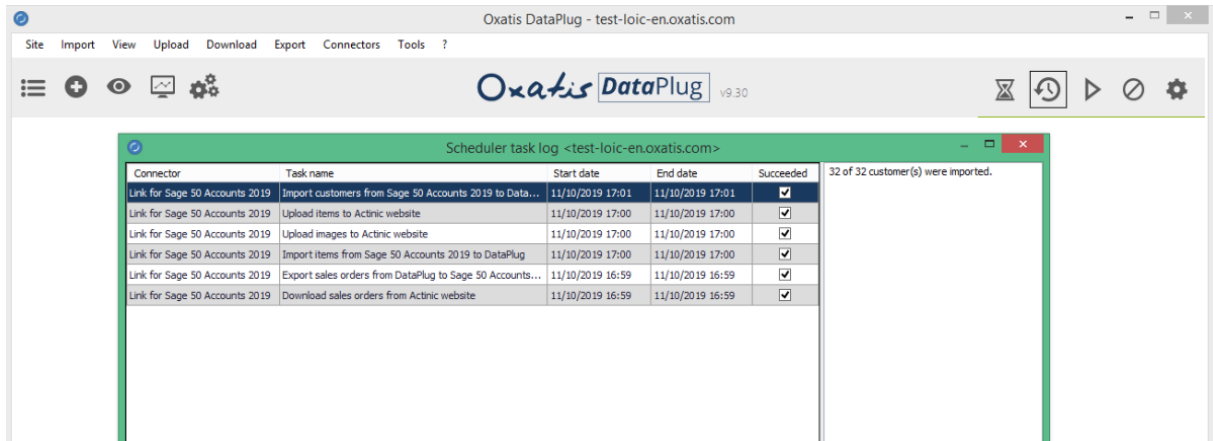
Below: You can close the DataPlug (from the red x in the main window, and not from the File menu) and leave it running in the background. An icon will appear in the Windows task bar.

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

- *Open the DataPlug.*
- *Consult running tasks.*
- *Consult the task log.*
- *Stop all running tasks.*
- *Quit the DataPlug.*