

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

## User Guide Link for Sage 50 Accounts





## Summary

1.	General 3
2.	Link for Sage 50 Accounts Settings
3.	Creating Products, Images and Customers in Sage 50 Accounts5
4.	Importing Products, Images and Categories from Sage to DataPlug
5.	Viewing Products Imported from Sage 50 Accounts
6.	Importing Customers
7.	Viewing Customers Imported from Sage 50 Accounts15
8.	Uploading Data (Images, Products and Users) to Oxatis
9.	Viewing Data Uploaded to the Oxatis Site
10.	Example of 2 Orders Placed on the Oxatis site
11.	Downloading Orders from the Oxatis site to the DataPlug
12.	Viewing Orders Downloaded to the DataPlug27
13.	Export Customer Orders to Sage 50 Accounts
14.	Viewing Sales Orders Imported to Sage 50 Accounts
15.	Creating Customers in Sage 50 Accounts
16.	Task Scheduler



### 1. General

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- 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 3<sup>rd</sup> party activation key, contact Sage at:
    - <u>support@sage.com</u>
    - 0845 111 55 11
- 2. Link for Sage 50 Accounts Settings

In the DataPlug, select the <u>Connectors | Link for Sage 50 Accounts | Configuration menu</u>.

Oconfiguration			-		$\times$
Sage 50 Accounts Professional 2019					
0					
	The SDO is not registered.				
Data folder location:					
Select company:					
User name:					
Password:		Connection Test			
			Ж	Cance	el

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:

Sage 50 Accounts Professional 2019          The SDO is not registered.         Register Sage SDO         Data folder location:         Select company:         Serial Number:         User name:         Activation Key:         Password:         OK	O Configuration		-	×
	Data folder location: Select company: User name:	Register Sage SDO ×		

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Or from the "Sage 50 Accounts" software: Go to <u>Tools</u> | <u>Activation</u> | Upgrade Program. You will be prompted for the Serial Number and Activation Key for the SDO.

品					Sage 50 Accounts Professional - Stationery & Computer Mart UK
File Edit View M	lodules Settings	Tools Favourites	WebLinks	Help	
Home Help centre					
Customers Quotations Sales orders Invoices and credits					Live Q&A sessions Welcome to Sage Welcome to Sage
Suppliers Purchase orders					Our Sage experts are holding Support, how can Get ready for MTD. We'll make Product Registration
Products and services					Activate Sage Software
Bank accounts					Manage existing licences:
Nominal codes					Licence on my computer:
VAT					Serial Number:      Serial Number:
Transactions					Activation Key:
Fixed assets					The licence on this computer is different to the licence held on your network.
Departments					Which licence is correct?
Projects					O The one on my computer CCB
Diary					
					Enter a new licence
					If neither of the above are correct you can enter an alternative serial number and activation key. These can be found on the correspondence received when you purchased your product.
					If you're a new customer and need to register your software click: Register my software
					Serial Number*:
					Activation Key*:
					Hint: If you've already registered your product and can't find your serial number or activation key, click: End my keys
					OK Cancel

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.

0	Configuration	- 🗆 🗙
Sage 50 Accounts Profes	ssional 2019 Task Scheduler	
Select company: User name:	C: \ProgramData \Sage \Accounts \2019 ···· C: \PROGRAMDATA \SAGE \ACCOUNTS \2019 \DEMODATA \ACCDATA \ ···· OXAUSER ****** Connection Test	
	OK	Cancel



## 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.

•	Prod	lucto
	1100	ucus

Below is a list	t of produc	is created	u in So	ige 5	U ACC	ounts			_						
5											5	Sage 50 Ao	counts	Profess	ional
File Edit View	Modules Setting	s Tools Fa	vourites	WebLin	ks He	р									
Home	o 🧋 🔅			€.,		5	£			2	k.	•	2	~%	4
Help centre		zard Duplicate	Batch changes	Activity	Buy/sell	Shortfall	Price lists	Check bill of materials	Stock	Stock valuation	Adjustment in	Adjustment out	Stock transfer	Copy discount	Return
Customers	Filter	Search				204	ll reco	rds (106)							
Quotations	Product Code	- In-	escription								Sales Price	0	uantity In	Stock	
Sales orders	MOUSE004	·····	ual Wheel i	Mouse							15.00	~		-12.00	
Invoices and credits	ENV001		velope - V		x 220) P	lain					8.99			-11.00	
	BOOKS002		4 Carbon 0								2.99			-4.00	
Suppliers	FLIP002		p Chart - /								16.00			-4.00	
Purchase orders	PC001		Combo P								550.00			-4.00	
	CDR001	cr	DR08432 F	lead/Write	E CD Drive						154.00			-3.00	
Products and services	PC003	PC	Combo P	ack 3							750.00			-3.00	
Products and services	TR001	LP	100 Laser	Printer To	ner						10.00			-3.00	
	PRC003	PC	R 700 Pro	cessor							200.00			-2.00	
Bank accounts	PC002	PC	Combo P	ack 2							650.00			-1.00	
Nominal codes	PRC004	PC	R800 Pro	cessor							300.00			-1.00	
VAT	CALC001	Ca	alculator -	Desktop							10.00			0.00	
Transactions	CALC002	Ca	alculator -	Pocket							6.00			0.00	
	CALC003	Ca	alculator -	Desktop (	Printing)						17.00			0.00	
Fixed assets	EURO01	EL	JRO01								10.00			0.00	
Departments	FAX001	FX	(010 Plain	Paper Fax							180.00			0.00	
Projects	FAX002	FX	(020 Multif	unctional	Fax						400.00			0.00	
	FAX003	FX	030 Multif	unctional	Fax						460.00			0.00	
Diary	FIL001	Fil	ing Cabine	t - 3 Drav	/er						45.00			0.00	
	FIL002		ing Cabine	t - 5 Drav	/er						65.00			0.00	
	INST001		stallation								50.00			0.00	
	LAM001		minator -								75.00			0.00	
	PC005		Combo P								1200.00			0.00	
	PRC005	PC	R900 Pro	cessor							400.00			0.00	

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

A	Product Record - CDR10432 Read/Write CD Drive	- 🗆 🗙
Clear form		
Details Bill of materials Discount Web Memo Activity Sales Graph	Product Details       Ordering         Product Code*       Item Type       Stock Item       Last Cost Price         Description       CDR 10432 Read/Write CD Drive       Last Cost Price       (Standard)         Category       10 Computer Hardware       ✓       Last Cost Price       (Discounted)         Intrastat Com. Code       Supp Unit Qty       0.00 T       Last Ord Qty       Last Ord Date       3         Bar Code       Inactive       Inactive       Incation       Workshop       Workshop       Inactive	160.00 TF 160.00 TF 10.00 30/03/2008
	Defaults     Sales Nominal Code     4000     Tax Code     T1 20.00     Price       Purchase Nominal Code     5000     Part No.     CD0124     Unit of Sale       Supplier A/C     SUP001     Department     1     Sales       EC VAT Description:     V     V     V	190.00 🗑 Each
	Status       Stock Take         In Stock       1.00       In Stock       1.00       Re-order Level       5.00       Date       3         Allocated       0.00       Image: Construction of the state	1/12/2007 10 6.00 17
	Record 1 of 1	ave Close

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A.	Product Record - CDR10432 R	ead/Write CD Drive	- • ×
Clear Delete Address			
Details Bill of materials Discount Web Memo Activity Sales Graph	Web Defaults         Description       EDR10432 Read/Write CD Drive         Details       This quality high speed writeable CD of the following specification:         Drive Speeds: 10 speed write, 4 speed rewrite, 32 speed read       Interface: EIDE         Indudes user manual and software.       Indudes user manual and software.         Image: Publish to Web       Special Offer         Custom Fields       Computer Hardware	Image	
	Category B CD/D/D Drives Category C	cdr003.jpg	Same Class
	Reco	rd lof 1	Save Close

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.



#### • Customers

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

Main	customer details.						 
<b>.</b>		Customer Rec	ord - Morley S	olicitors		-	Clear
	New New Delete Sky	ype Google Maps					
Details	Account Details		Contact	Information			
Defaults Credit Control	A/C*	MOR001 ¥	Contact r	John Bam	pton		ier
Bank	Company name	Morley Solicitors	Trade cor	ntact Heather B	Bell		
Communications	Balance	392.67 08	Telephon	e 01789 656	5 556	-	tone
Memo	Inactive		Telephon	e 2 01789 656	5 558		
Activity	Desistant address		Fax	01789 65	6 557		
Sales	Registered Address		Website	www.sage	e.co.uk	-	wc
Orders	Street1 Street2	23 High Street					
Projects	Town	Evesham	- Social Me				rris
Graph	County	Worcestershire	Twitter	www.	twitter.com/		·
	Post Code	WR34 3CD	LinkedIn	www.li	nkedin.com/		.q
	Country	United Kingdom GB 🗸	Facebook	www.fac	ebook.com/		etter
	VAT Number	GB382 3234 12					cuc
		Addresses & Contacts	Email Set	ttings & Addresse	25		
			Email 1		newbusines	sadvice 19@sage.c 🖂	er
			Email 2			-	1
			Email 3				n 1
							m
			I send le	tters, statements, e	etc. to this customer via e	mail 🗌	ani
					Addresses & Co	ntacts	×
			0 🖊 🛛				
			New Edit Co		ferences		
		I4 - 4		stomer Addresses	×		
	iueo kentai company		~/~		×		
	Young		Mo	orley Solicitors			
			Description 🔺		Τ	уре	
			Main Office Addr			elivery address	
			Registered addre Trade contact	285		egistered address ontact address	

#### Customer delivery address:

General			Contact Detail	5	
Description*:	Main Office Address		Contact name:	John Bampton	
Address type:	Delivery address	*	Role:		
Notes:		^	Telephone:	01789 656 556	
			Telephone 2:		2
		-	Fax:	01789 656 557	
Address			Email:	john@morleysol.co.uk	
Company	Morley Solicitors				
Street1	23 High Street		VAT Details		
Street2			Def. Tax Code:	T1 20.00 ↔	
Town	Evesham		VAT Number:		
County	Worcestershire		var number:		
Post Code	WR34 3CD				
Country	United Kingdom GB	*		ОК	Cancel



## 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:* <u>Connectors | Link for Sage 50 Accounts | Import Products</u>. *You will then be guided through the configuration of the data to import.* 

Site	Import	View	Upload	Download	Export	Connectors Tools ?		
						Link for Sage 50 Accounts 2018	- • I	
≣	0	$\mathbf{O}$	- 🗠 🧃	<b>1</b> 00		Link for Sage 50 Accounts 2019	•	Import Items
	-					Excel/CSV/OpenScript schedulable	•	Configuration
								Import Customers
								Export Sales Orders
								Tasks >

Data transfer to Oxatis



#### 1<sup>st</sup> 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"

0	Import Items	- 🗆 🗙
Oxa <i>tis</i> DataPlug	Importing items from Sage 50 A Professional 2019	ccounts
$\uparrow$	End: En	ries rt: 0 • d: 0 • e Item
sage	Stock to map: Quantity: In Stock O Free Stock	
	< Back Ne	ext > Cancel

2<sup>nd</sup> 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.

0	Impor	t Items	×
Image transformation	settings		sage
Import images		Preview:	
Suffix ▷ Resizing	Maintain aspect ratio		
Thumbnail Image     Suffix	x175		
Resizing     Zoom Image     Suffix	Maintain aspect ratio	)xa.	
▷ Resizing	Maintain aspect ratio	1 K G	
Suffix		1	
	tinguish the generated images. This end of the file name.		
		< <u>B</u> ack <u>N</u> ext	> Cancel



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

Import Items	- 🗆 🗙
Importing or updating items from Sage 50 Accounts Professional	I 2019 Sage
86 record(s) to import. Click on [Next >] to start importing.	
	< Back Next > Cancel

*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.

0	Import Items		- 🗆 🗙
Process results Consult the message errors and warnings below.			sage
86 of 86 item(s) were imported.			
Errors and Warnings:			
		< Back Next >	Finish



## 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 <b>View</b>	Items menu before uploading it to	vour Oxatis website
	items mena bejone aproading it to	your onaits website.

0				Oxatis Data	aPlug - t	est-loic-e	en.oxatis.com					
Site	Import	View Upload Download	Export Connectors Tools ?									
≔	0	Images Items Customers		Oxa	tis	Data	Plug v9.30		5	>	$\oslash$	φ.
		Sales orders		No DataPlug d	lata back	up has b	een performed					
			Data transfer to O	katis								
				Import into	the Data	Plug	Upload to Oxatis					
			Images	٦	Q	216	216	(nt)				
			Products	٦	Q	86	<b>6</b> 86	Upload all				
			Customers	٦	Q	0	0	$\bigcirc$				
			Oxatis Sales Order									
			Download	Export			Synchronization	Upload to Oxatis				
				0			Q O	O				

#### Preview of "General" tab in the item list.

0									Items					- 🗆 🗙
Display or	ly data to u	pload							Stock	Cate	egories	Up/Cross-S	elling and Ch	aracteristics
Find:									Linked Items		Images	Addi	tional Image	Properties
									SEO, Additional infor	mation	Weight, Dimensions and	d Cost of han	dling Link	for Sage 50 Accounts 2019
Three Cliffs	1	Manua	0	Colores	Countral	Modified	Uploaded		General		Prices		Discount P	tules
Item SKU BOARD	Language	Whitebo	Quantity	Categor			Upioaded	n	Code:				tis ID:	
				Office E					CDR002 Parent code:			0	ent Oxatis ID	
BOOKS002		A4 Carb		Office S					Parent code:			Pale	ent Oxatis IL	/=
BOOKS003		Shortha		Office S					Name:					Display Language:
CALC004		Calculat		Office S					CDR 10432 Read/Writ	e CD Drive	e			
CAS001		AT Mini		Comput									Default o	otion
CAS002		ATX Mini		Comput										d with the item having:
CAS003		ATX Des		Comput									Stock share	a with the item having:
CDR001		CDR084		Comput				1					Oxatis II	D:
CDR002		CDR 104	-	Comput									Languad	
CDR003		CDR124		Comput									Languay	
COR001		Correcti		Office S									Code:	
DISK001		Diskette		Comput										
DISK002		Disk - C		Comput										
ENV001		Envelop	0	Office S	11/10/2	11/10/2						E	AN code:	
ENV002		Envelop	49	Office S	11/10/2	11/10/2							IPN:	
ENV003		Envelop	52	Office S	11/10/2	11/10/2							1PN:	
ENV004		Envelop	32	Office S	11/10/2	11/10/2			Description:					
FLIP001		Flip Cha	21	Office S	11/10/2	11/10/2			CDR 10432 Read/Writ	e CD Driv	e			
FLIP002		Flip Cha	0	Office S	11/10/2	11/10/2								
HAR001		10gb Ha	13	Comput	11/10/2	11/10/2								
HAR002		20gb Ha	9	Comput	11/10/2	11/10/2								
HAR003		30gb Ha	25	Comput	11/10/2	11/10/2			Detailed description:					
KEY001		Standar	41	Comput	11/10/2	11/10/2				d writeabl	le CD drive comes with th	e following sp	ecification:	
LABELS		A4Labe	3	Office S	11/10/2	11/10/2					4 speed rewrite, 32 spee			
LABELS		A4Labe	39	Office S	11/10/2	11/10/2			Interface: EIDE Indudes user manual	and softw	vare.			
LAM002		Laminat	17	Office S	11/10/2	11/10/2								
								-						



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

Display on	ly data to u	pload							General	_	Prices	_	Disc	ount Rules
Find:	ily docu to d	produ							Stock	Cateo	and the second s	11n/Croce	1.2013	nd Characteristics
e 10.								-	SEO, Additional inform		Weight, Dimensions and			Link for Sage 50 Accounts 20
									Linked Items		Images			mage Properties
Item SKU	Language	Name	Quantity	Categor	Created	Modified	Uploaded	*				11500		
BOARD		Whitebo	5	Office E	11/10/2	11/10/2			Thumbnail Image: M	lain Imag	ie:			
BOOKS002		A4 Carb	0	Office S	11/10/2	11/10/2			-	-				
BOOKS003		Shortha	64	Office S	11/10/2	11/10/2								
CALC004		Calculat	152	Office S	11/10/2	11/10/2								
CAS001		AT Mini	9	Comput	11/10/2	11/10/2					and the second se			
CAS002		ATX Mini	6	Comput	11/10/2	11/10/2			0					
CAS003		ATX Des	1	Comput	11/10/2	11/10/2								
CDR001		CDR084	0	Comput	11/10/2	11/10/2			Additional Images: (	Thumb	nail 🔿 Main 🔿 Zo	om		
CDR002		CDR 104	1	Comput	11/10/2	11/10/2								
CDR003		CDR 124	2	Comput	11/10/2	11/10/2								
COR001		Correcti	61	Office S	11/10/2	11/10/2								
DISK001		Diskette	36	Comput	11/10/2	11/10/2								
DISK002		Disk - C	6	Comput	11/10/2	11/10/2								
ENV001		Envelop	0	Office S	11/10/2	11/10/2			in the					
ENV002		Envelop	49	Office S	11/10/2	11/10/2								
ENV003		Envelop	52	Office S	11/10/2	11/10/2								
ENV004		Envelop	32	Office S	11/10/2	11/10/2								
FLIP001		Flip Cha	21	Office S	11/10/2	11/10/2								
FLIP002		Flip Cha	0	Office S	11/10/2	11/10/2								
HAR001		10gb Ha	13	Comput	11/10/2	11/10/2								
HAR002		20gb Ha	9	Comput	11/10/2	11/10/2								
HAR003		30gb Ha	25	Comput	11/10/2	11/10/2								
KEY001		Standar	41	Comput	11/10/2	11/10/2								
LABELS		A4 Labe	3	Office S	11/10/2	11/10/2								
LABELS		A4 Labe	39	Office S	11/10/2	11/10/2								
LAM002		Laminat	17	Office S	11/10/2	11/10/2								

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

•								Items						-	
Display on	ly data to u	pload						General			Prices		Disco	ount Rules	
Find:								Linked Ite	ms		Images	1	Additional I	mage Properties	
								SEO, Addi	tional informatio	m \	Weight, Dimensions ar	nd Cost of	handling	Link for Sage 50 Acco	unts 201
Item SKU	Language	Name	Quantity	Categor	Created	Modified	Uploaded	Stock		Catego	ories	Up/Cros	ss-Selling a	nd Characteristics	
BOARD	Language	Whitebo		5 Office E			opioaded	1st catego							
BOOKS002		A4 Carb		Office S				Computer	naroware						
BOOKS002 BOOKS003		Shortha		4 Office S				2nd categ							
CALC004		Calculat		2 Office S				CD\DVD D	rives						
CAS001		AT Mini		9 Comput				3rd catego	ory:						
CAS002		ATX Mini		5 Comput											
CAS002 CAS003		ATX Des		1 Comput				4th catego	ory:						
CDR001		CDR084		Comput											
CDR001		CDR104		1 Comput				5th catego	ory:						
CDR002		CDR124		2 Comput											
COR001		Correcti		1 Office S				6th catego	iry:						
DISK001		Diskette		5 Comput											
DISK002		Disk - C		5 Comput				7th catego	erv:						
ENV001		Envelop		O Office S											
ENV002		Envelop		9 Office S				8th catego	inv:						
ENV003		Envelop		2 Office S				oth corego							
ENV004		Envelop		2 Office S				9th catego	201						
FLIP001		Flip Cha		1 Office S				Stircatege	// <b>y</b> .						
FLIP002		Flip Cha		Office S				10th categ							
HAR001		10gb Ha		3 Comput				Toth categ	1013:						
HAR002		20gb Ha		9 Comput				These family							
HAR003		30gb Ha		5 Comput				Item famil	y:						
KEY001		Standar		1 Comput											
LABELS		A4Labe		3 Office S											
LABELS		A4Labe		9 Office S											
LAM002		Laminat		7 Office S											



### 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 %
Discount	Discoulter

3. Importing customers:

*Click on the following menu in the DataPlug:* <u>Connectors | Link for Sage 50 Accounts | Import Customers.</u> *You will then be guided through the configuration of the data to import.* 

0 0	<b>0</b> %	L		ge 50 Accounts 201 /OpenScript schedu	 •	Exp	nfiguration ort Sales Orde	ers	
						-	oort Items oort Customer	rs	
						Tas		•	
		Data t	transfer	to Oxatis					
		Data I	transfer		the Data	aPlug	Uple	oad to C	Oxatis
		Data 1 Imag		Imp	the Data	aPlug 216	Uple	oad to C	



### 1<sup>st</sup> step: You can select:

- A range of Account Customer codes.
- A range of Account Status.

•	Check the Billing phone numbers

0	Import Customers	- 🗆 🗙
Oxatis DataPlug	Importing customers from Sage 50 Accounts Professional 2019	
$\uparrow$	A/C Start: End: Account status	
sage	Start: 0 End: 0 End: 0	
	< Back Next >	Cancel

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

0	Import Customers	X
Importing or updating customers	from Sage 50 Accounts Professiona	I 2019
31 record(s) to import. Click on [Next >] to start importing.		
		< Back Next > Cancel



*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.

0	Import Customers	×
Process results Consult the message errors and warnings below.		sage
31 of 31 customer(s) were imported.		
Errors and Warnings:		
		< Back Next > Finish

### 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.

Site Import View Upload Download Export Connectors Tools ? Images	
Items Oxatis DataPlug	v9.30
Customers	
Sales orders	
Data transfer to Oxatis	
Import into the DataPlug Up	load to Oxatis
Images Q 216	216
Products Q 86	
Customers Q 31	31



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.

0								Cust	on	ner	rs					
	] Display only data to	o uplo	ad									Categories	Discount rules	Prices per packag	ing	Custom fields
F	ind:											Main Information	Address	Shipping addresses	Ad	ditional information
												Credit Custome	er			
	Email		Last Name	Company	 City	Post	State	Phone				Title:				
•	newbusinessadvic			Peter Young	Cardiff	C34		08976 656 878				First Manual				
	newbusinessadvic			The Video	Skipton		West Yo	0678 234 5678				First Name:				
	newbusinessadvic			Swan Leis	Sunderland			0191 567 2345				Last Name:				
	newbusinessadvic			Edward S	Gateshead			0191 839 3940				Peter Young				
	newbusinessadvic		Steven Y	Steven St	Manchester	M23		0151 977 8876				Email: newbusinessadvice	30@caca.com			
	newbusinessadvic		Jonatho	Stevenso	Altrincham	C39	Cheshire	01244 453 232				Company:	ooleaage.com			
	newbusinessadvic		Lesley W	The Show	Birmingham	B12	West Mi	0121 383 0345				Peter Young				
	newbusinessadvic		Jane Scott	S D Enter	Heaton	NE5	Tyne &	0191 937 9836				VAT Reg No:				
	newbusinessadvic		Stephen	Robertso	Hounslow	TW8	Middlesex	0181 789 2323				Bus Reg No:				
	newbusinessadvic		Ahmed R	Picture Fr	Devizes	SN12	Wiltshire	01249 265 9								
	newbusinessadvic		Simon Bill	Patterson	West Denton	EK1	East Kib	0987 678 234				Legal form:				
	newbusinessadvic		John Ba	Morley So	Evesham	WR3	Worcest	01789 656 556				NAF Code:				
	newbusinessadvic		Tracy Sm	Mile Road	Whitley Bay	NE65	North Ty	01981 674 234				NAT CODE.				
	newbusinessadvic		Mike Bra	Mikes Ins	Bradford	WS1	West Yo	01754 234 895				Date of Birth:				
	newbusinessadvic		Siobhan	Macolm H	Chester	CH1	Cheshire	01244 343433				Oxatis ID	Curtan	erence (Link for Sage	F0.4	2010)
	newbusinessadvic		John Bell	Kinghorn	Newcastle	NE19	Tyne &	0191 676 5656				Oxatis ID 0	YOU001	erence (Link for Sage	SU ACC	ounts 2019):
	newbusinessadvic		John Smith	John Smit	East Herrin	HU1	Humbers	01327 617 542								
	newbusinessadvic		Alistair L	Hausser	Germany			00 49 531 3								

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

Email 🔹	 Last Name	Company	 City	Post	State	Phone			 	
newbusinessadvic	Peter Yo	Peter Young	Cardiff	C34		08976 656 878				
newbusinessadvic	June Whi	The Video	Skipton	WY1	West Yo	0678 234 5678				
newbusinessadvic	John Blair	Swan Leis	Sunderland	SU16	Tyne &	0191 567 2345	•••			
newbusinessadvic	Edward	Edward S	Gateshead	NE4	Tyne an	0191 839 3940				
newbusinessadvic	Steven Y	Steven St	Manchester	M23		0151 977 8876				
newbusinessadvic	Jonatho	Stevenso	Altrincham	C39	Cheshire	01244 453 232				
newbusinessadvic	Lesley W	The Show	Birmingham	B12	West Mi	0121 383 0345		***		
newbusinessadvic	Jane Scott	S D Enter	Heaton	NE5	Tyne &	0191 937 9836				
newbusinessadvic	Stephen	Robertso	Hounslow	TW8	Middlesex	0181 789 2323				
newbusinessadvic	Ahmed R	Picture Fr	Devizes	SN12	Wiltshire	01249 265 9				
newbusinessadvic	Simon Bill	Patterson	West Denton	EK1	East Kilb	0987 678 234				
newbusinessadvic	John Ba	Morley So	Evesham	WR3	Worcest	01789 656 556				
newbusinessadvic	Tracy Sm	Mile Road	Whitley Bay	NE65	North Ty	01981 674 234				
newbusinessadvic	Mike Bra	Mikes Ins	Bradford	WS1	West Yo	01754 234 895				

Categories	Discount rules	Prices per packaging	Custom fields
Main Information	Address	Shipping addresses	Additional information
Address Line 1:			
78 Turnberry Roa	ad		
Address Line 2: W <mark>elburry</mark>			
Postal Code: C34 3TY	City/Town: Cardiff		
Country: GB	State:		
Felephone: 08976 656 878		Mobile:	
ax:			



## 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**.

Site Import View Upload Download Export Connectors Images Items Customers	Oxatis DataPlug 1930	X ·
Sales order progress states All Data transfe	er to Oxatis	
	Import into the DataPlug Upload to Oxatis	
Images	Q 216 🚱 216	(AT)
Products	Q 86 6 86	Upload all
Customers	<b>1 Q</b> 31 <b>3</b>	$\bigcirc$

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

0	Upload all data to: test-loic-en.oxatis.com 🛛 – 🗖 💌
	Uploading all data to:
	test-loic-en.oxatis.com
	333 record(s) to upload to: test-loic-en.oxatis.com. Click on [Next >] to start uploading.
	Default separators: Related items: # ~
	Characteristics:     Characteristic assignment:     Characteristic values:       I     =     ;
Oxatis	Characteristic 1 = value 1 ; value 2 ; value 3   Characteristic 2 = value 4 ; value 5 ; value 6
	Remove from the DataPlug all non-existent products on Oxatis site
	< Back Next > Cancel

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.



0	Upload all data to: test-loic-en.oxatis.com	- 🗆 🗙
Uploading data process		Oratis
Data upload in progress		
Click [Cancel] to abort.	cdr003x1200	
	24/333 7%	
	< Back Next	Cancel

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

O Upload all data to: test-loic-en.oxatis.com	- 🗆 🗙
Process results Consult the message errors and warnings below.	Oratis
216 of 216 image(s) uploaded. 86 of 86 item(s) uploaded. 31 of 31 user(s) uploaded. Errors and Warnings:	
errors and warnings:	
Copy errors and warnings to dipboard	
<back next=""></back>	Finish



### 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.

Oxatis	Orders Customers	Catalogue Content	Marketing Analyti	cs Configuration Apps 🚥	New version	⊚ test-loic-en
≡ ∣∢	Customers					
Lement - Editing	T Filter + Add	Delete Export >>				(31 Elemer
Component - Properties						
T Component - Text	Creation date	Last name	First name	Email	Language	Company
Category - Editing						
這 To-Do List	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	lan Cairns		newbusinessadvice01@sage.com		A1 Design Services

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

Oxatis	Orders	Customers	Catalogue	Content	Market			
≡ ∣◄	Products	- Category Editing						
Element - Editing								
Lement - Classification	English	<ul> <li>Classify by</li> </ul>	name 🔻					
Element - Layout	<b>+</b> A	dd a category to the	root					
Component - Properties	Books							
🚠 Category - Editing	- 🕼 Calculator Supplies							
這 To-Do List	<ul> <li>CD (1)</li> <li>DVD Drives</li> </ul>							
	- 🕼 CD/DVD							
		CD/DVD Drives						
		Computer Accessori	es					
		Computer Cases	_					
		Correction Fluid	=					
		Envelopes						
		Flip Charts						
		Floppy Disks						
	- 🔊	Hard Drives						
	- 🔊	Keyboard						

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. Oxatis Orders Customers Catalogue Content Marketing Analytics Configuration Apps O ter ON Image Gallery 🖍 Element - Editing Our Collection (ZIP File) >> 2 Component - Properties ▼ Filter ☎ Refresh + Add @ Delete Categ (216 Elements) 1 2 3 4 Category - Editing 📃 To-Do List Img. Previev From То tray002x1200 71.50 Kb tray002x1200.jpg tray002 tray002.jpg 16.30 Kb 5.20 Kb trav002x175 tray002x175.jpg

Below is the detailed product information for product code "CDR002":

P

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

Oxatis	Or	ders	Custom	ners	Catalogue	e Conter	nt Mar	keting	Analytics	Configuration	Ap
oduct : CDR10432 R	ead/Writ	e CD Dri	<b>ve</b> - Prope	rties							
< Back	街 Dup	olicate	🗊 Delete								
General Image(		ories S Availability		uage and \ and Dimen			/Cross-Selling	Charact	eristics Bundl	e	
Main Information	1 1	Availability	, weight	and Dimen		ioning   intangli	ore products				
EAN Code: MPN:	CDR002 CDR10432 F CDR10432 F										
Prices:		Sale	Price	Strikethr	ough Price	Packing Unit	Discount				
		Ex VAT	Inc VAT	Ex VAT	Inc VAT						
	Price 1	190.00	228.00			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					
Highlight:	UK - Standa 160.00	rd Rate (20	).096)								



Jxa	tis	Orders	Customers	Catalogue	Content	Marketing	Analytics	Configuration	Apps 🤇	New versior
luct : CD	R10432 Rea	d/Write CD Dr	<b>ive</b> - Properties							
< Back	🕼 Edit	🖉 Duplicate	🛱 Delete							
General	Image(s)	Categories S	EO Language and	d Visibility Attrib	Dutes Up/Cro	oss-Selling Chara	cteristics Bundle			
Main	ADDITIONAL	Stock Availabi	ility Weight and D	mensions Hand	ling Intangibl	e products				
Additi	onal Informati	on								
Brand: Discoun Product Guarant	[ t Grid: Condition: N	ncludes user man None] New	uai anu sortware.							
Naviga	tion Behaviou	ır								
Type of	Behaviour: Do	nothing 📄								
Produ	ct Quanti	itv in Stock	and Re-ord	ler Level						
	ct Quanti	ity in Stock	and Re-ord		alogue	Content	Marketing	Analytics	Configuratio	on Apps

roduct: CDR 10432 Read/Write CD Drive - Properties
< Back 🕼 Edit 🕼 Duplicate
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")
© 2001-2019 Oxatis. All rights reserved. Product Weight
Oxatis Orders Customers Catalogue Content Marketing Analytics Configuration Apps
Product : CDR10432 Read/Write CD Drive - Properties
< Back 🕼 Edit 🕼 Duplicate
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)

© 2001-2019 Oxatis. All rights reserved.



Product Imag	es (Main,	Thumbnail	and Zoom)							
Oxatis	Orde	ers Custo	omers Cat	alogue	Content	Marketing	Analytics	Configuration	Apps	
Product : CDR10432 F	Read/Write	CD Drive - Pro	perties							
< Back	🖄 Duplic	ate 📋 Dele	te							
General	(s) Categori	es SEO La	anguage and Visibi	lity Attribu	tes Up/Cross	-Selling Chara	cteristics Bundle			
ASSOCIATED IMAG	E(S)									
Main Image										
	2.0									
Thumbnail										
Additional Image	es									
C Edit Additiona	Images									
	-									
Product Cate	nories									
Oxatis	Orders	Customers	Catalogue	Content	Marketing	Analytics	Configuration	Apps 💿	New version	

Product : CDR10432 Read/Write CD Drive - Properti

oduct : CDF	(10452 Kea	d/write CD	Drive -	Properties					
< Back	C Edit	신 Duplicate		Delete					
General	Image(s)	Categories	SEO	Language and Visibility	Attributes	Up/Cross-Selling	Characteristics	Bundle	
CATEGOR	Y CLASSIFICA	TION							
Categor	y Classificati	ion							
	1: Computer								
Category Category	<ol> <li>CD \ DVD I</li> <li>3:</li> </ol>	Drives							

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## 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 o	f the o	orders i	placed	on the	oxatis site.

rder Tracking Dise	(0 Elemen
Quick filter: None	(0 Elemen
🖸 Src. No. Date Time Amount Invoice No. Language Customer Payment Shipping Status Progress Indicator	
From To To	ок х
27112123 11 October 2019 17:13 227.48       10 October 2019     17:13     227.48     Em     Stephen BAKER     Y R     Image: Comparison of the comparison of	021
■ ♠ 27112069 11 October 2019 17:08 296-49 ■ ♠ 27112069 11 October 2019 17:08 296-49 ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●	0 2 1

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

Order #27112123 🎇				11 Oct 20
Customer Information Mr Stephen Baker (newbusinessa Robertson Joinery (GB311 1284 3 Phone: +44 191 789 2323 Fax: 0181 789 3434		ge.com)		
<b>Billing Address</b> 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				
<b>Shipping Method</b> Royal Mail				
Payment Method Check				
Details		1		
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	
Sub	total before	discount	£ 301.20	
	Discoun	t (10.00%)	-£ 30.12	
		Subtotal	£ 271.08	
			£ 26.40	
	Shipping &	Royal Mail	£ 20.40	

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			
Sub	£ 250.00					
	Discoum	t (10.00%)	-£ 25.00			
		Subtotal	£ 225.00			
	£ 22.00					
	VAT					
		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.

			wing men ed through						r <b>ders.</b> ers to download.			
0					-	-			en.oxatis.com			
Site	View	Upload Dow	vnload Export Sales orders	Connectors	Tools ?	Oxa	tis	Data	Plug v9.30		$\mathbb{X}$	•
			Ima Proc	transfer ges ducts stomers	r to Ox	atis Import inte D	Q Q Q Q	aPlug 216 86 31	Upload to Oxatis 0 0 0 0 0	Upload all		
			Oxati Down	is Sales load Q 0		Export			Oxatis states of pr Synchronization	Ogress Upload to Oxatis		

**1**<sup>st</sup> 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.

0	Donwloa	ad sales orde	rs – 🗆 🗙										
Oxatis DataPlug	Downloading sales orders from: test-loic-en.oxatis.com												
	Select date range												
<b>Data</b> Plug	Period:	Manual selection	¥										
	Start:	10 October 2019	16:20 -										
	End:	11 October 2019	16:19 🔹										
	Consider payment status		Options										
	Payment Confirmed     Payment in Progress     Contacting Payment Process	or	Select:      All      Invoiced orders     Include sales orders manually confirme										
	Payment Refused Canceled		Download										
$\sim$			✓ Items details										
Oxatis	Period: Manual selection	~	✓ Users details										
	Start: 10 October 2019 16:20	Ψ.	Save estimate for the advantiles										
	End: 11 October 2019 16:19	$\overline{\mathbf{v}}$	Save settings for the scheduler										
			< Back Next > Cancel										



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

0	Donwload sales orders		- 🗆 🗙
Downloading sales orders process test-loic-en.oxatis.com			Oxatis
2 Sales order(s) to download. Click on [Next >] to start downloading.			
		< Back Next >	Cancel

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

0	Donwload sales orders			- 🗆 🗙
Process results Consult the message errors and warnings belo	W.			Oxatis
2 of 2 order(s) downloaded. Errors and Warnings:				
Oxatis Sales Order # 27112123: Invalid VAT numbe	r -> 68311 1284 34			
c	Copy errors and warnings to clipboard			
		< Back	Next >	Finish



### 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.

0	Oxatis DataPlug - test-loic-en.oxatis.com										
Site	Import	View Upload Download Images Items Customers	Export Connectors Tools	? Oxatis Do	ataPlug v9.30		0 > 0 <b>*</b>				
		Sales orders	Data transfer to Images Products Customers	Oxatis Import into the DataPluy C 21 C 86 C 31	5 Ø 0	Upload all					
			Oxatis Sales Ord Download	Export C 2	Oxatis states of prospective states of prospective states of the states	Ogress Upload to Oxatis					

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

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

Display only data to export Display only data to upload		Shipping Addr	ress	Instructions	Custom fields	Miscellaneous
		Details	To	tal <u>M</u> a	ain Information	Billing Address
Rechercher :		Total VAT excl	uded:		ency:	
			250 👻	GBP		
		 Discount:			Cash on delivery	
Order n Date Email Company First name Last na		10 - %	25 -			
<ul> <li>27112069 11/10/2 newbusi Peter Yo Peter Young</li> </ul>	296.4	Total discount		cluded:		
27112123 11/10/2 newbusi Roberts Stephen Baker	297.48		225 👻			
		Shipping price		uded:		
			22 -			
		Payment fees	VAT exclue	ded:		
		Total:	0 *			
			296.4 -			
		Tax details:				
		Name	E	lase	Rate	Amount
				225.00	20.00	45.00
		Total Tax:	45 👻			
		Shipping Tax:	1.4 -	Ship	ping Tax Rate:	
		Payment Fees		Pavn	nent Fees Tax Rate:	
			0 -		0 -	
		Loyalty point	earned:	Loya	alty point used:	
			~		0 👻	



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

0	)							Sales	Ord	lers											-	×
	] Display only	data to export	Display	only data to up	pload				S	hipping Addre	ss	D	nstructions		C	ustom <u>†</u>	jelds		M	iscellane	ous	
									1	<u>etails</u>		Total		<u>M</u> ain Ir	nforma	ation			Billing	Address		
R	echercher :									Bundle detail	s Tax	details										
	Order num	Date	Email	Company	First name	Last name	Global Amo	Export date	16	Item Code	Item Nam	e			Qu	Gro	Dis	Net	Net	Та	Off	Deliver
۲	27112069	11/10/201	newbusine	Peter Young	Peter	Young	296.4		•	CAS002	ATX Mini	Fower Ca	ase		1	20	0	20	20	20		
	27112123	11/10/201	newbusine	Robertson	Stephen	Baker	297.48			CDR002	CDR 1043	2 Read/	Write CD Drive		1	190	0	190	190	20		
										DISK002	Disk - CDI	R (640ME	B)		5	8	0	8	40	20		

### 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: <u>Connectors</u> | Link for Sage 50 Accounts 2016 | Export <u>O</u>rders You will be guided through the necessary configurations to export your orders.

Site	Import	View	Uploa	d Download	Export	Connectors Tools ?		
						Link for Sage 50 Accounts 2019	•	Configuration
i	0	Ο	~	<b>8</b> %		Excel/CSV/OpenScript schedulable	•	Export Sales Orders
						· · · · · ·		Import Items
								Import Customers
								Tasks 🕨
					Data	transfer to Oxatis		

	Import into the DataPlug	Upload to Oxatis	
Images	<b>Q</b> 216	0	G
Products	<b>Q</b> 86	0	laU



- 1<sup>st</sup> 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

0	Exporting Orders	×
Oxatis DataPlug	Exporting Orders to Sage 50 Accour Professional 2019	nts
	Export all      Start: 11 October 2019 00:00      End: 11 October 2019 23:59      Orders already exported      Carriage Nominal Code      Adjustments	
sage	Stock  Allocate stock on exporting orders <back next=""></back>	Cancel

2<sup>nd</sup> 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

0	Exporting	Orders – 🗆 🗙				
Product and Customer Accour	nt assignement rules	sage				
New Customers		✓ Existing customers				
Creating new account: OXAC (Prefix to be used on Choose a default customer accoun B2C	creating account reference) t reference:	<ul> <li>Add new contact details and customer record address</li> <li>Overwrite contact details and customer record address</li> </ul>				
	New Products Create a new re Always use 'S1' Always use 'S2'	product code				
		< Back Next > Cancel				



**3**<sup>nd</sup> 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

0	Expo	orting Orders		- 🗆 🗙
Sales Orders Payr	ment Type and Bank Account m	apping		sage
	Bank Account Mapping			1
	Local currency sales orders:	1200   Bank Current Account	~	
	Foreign currency sales order:	1200   Bank Current Account	*	
	Oxatis Payment Type mapping			i l
	Check: P	ayment already received	¥	
	Credit Cards: P	ayment already received	~	
	Wire transfer: P	ayment already received	~	
		ayment already received	~	
	Credit Cards (X times):		*	
	Other: P	ayment already received	~	
			1	~
		<	Back Ne	xt > Cancel

4<sup>nd</sup> step: The number of orders to export is displayed. Click on the "Next" button to export the customer orders to the Sage 50 Accounts.

0	Exporting Orders	×
Exporting Orders to Sage 50 Accounts	Professional 2019	sage
2 Sales order(s) to export. Click on [Next >] to start exporting.		
	<1	Back Next > Cancel



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).

0	Exporting Orders		×
Export Results Consult the message errors and warnings below.		sa	
2 Sales order(s) added.			
Results Errors and Warnings Sales order # 55 created. Sales order # 56 created.			
Sales of del # 30 d caled.			
	Copy errors and warnings to dipboard		
		< Back Next > Finish	

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

0								Sales (	Orders		
	Display only	data to export	Display	only data to up	pload				Shipping Address	Instructions	Progress States History
									Details	Total	Main Information
De	chercher :								Title:		B2C
ке	chercher :								Mr.		
									First Name:		
	Order num	Date	Email	Company	First name	Last name	Global Amo	Export date	Peter		
×.	27112069	11/10/201	newbusine	Peter Young	Peter	Young	296.4	11/10/2019	Last Name:		
	27112123	11/10/201	newbusine	Robertson	Stephen	Baker	297.48	11/10/2019	Young Email:		
									newbusinessadvice30@	Isage.com	
									Company:		
									Peter Young		
									VAT Reg No:		
									Bus Reg No:		
									Legal form:		
									Legal form:		
									NAF Code:		
									Payment method:		
									Wire transfer		
									Shipping method:		
									Royal Mail Sales representative:		
									Sales representative;		
									Discount Coupon:		
									Invoice #:		
									Invoice Date:		
									Delivery Date:		
									17/10/2019 17:09		
									Point of sale:		
									Link for Sage 50 Accou	into 2010 epiles or	der #
									Link for Sage 50 Accou 55	ints 2019 sales of	uer #



### 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: <u>M</u>odules | Sales Orders

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

1						Sage 50 Accounts	Professional - Stationery & Compu	ter Mart UK
File Edit View M	Modules Sett	tings Tools Fav	ourites WebLinks	Help				
Home Help centre	New Edit	Duplicate stock	Amend Shortfall I allocations		Intrastat Return Print	Email Delete Swap Clear	Print list Send to Excel	
Customers	Filter	Search		Q 🖉 All records (36)				
Quotations	No.	▼ Type	Date	Name		Amount £	Foreign Amount Currency Code	Allocated
Sales orders	56	Ord	11/10/2019	Robertson Joinery		297.48	297.48 GBP	FULL
Invoices and credits	55	Ord	11/10/2019	Peter Young		296.40	296.40 GBP	FULL
	54	Ord	13/05/2019	Fred Briant		36.00	36.00 GBP	
Suppliers	53	Ord	13/05/2019	Fred Briant		127.20	127.20 GBP	
Purchase orders	52	Ord	15/03/2019	Arsenal		84.72	84.72 GBP	FULL
	51	Ord	15/03/2019	ABS Garages Ltd		29.06	34.00 EUR	
Products and services	50	Ord	13/03/2019	Mr. First Last		86.40	86.40 GBP	
rioducta dila aci vicea	30	Ord	22/06/2018	John Smith Studios		256.27	256.27 GBP	
	29	Ord	19/06/2018	Fred Briant		324.66	324.66 GBP	
Bank accounts	28	Qte	07/05/2018	Steven Stephenson		2811.84	2811.84 GBP	
Nominal codes	27	Ord	27/04/2018	Bobs Building Supplies		4309.77	4309.77 GBP	
VAT	26	Ord	21/04/2017	S D Enterprises		1239.68	1239.68 GBP	
Transactions	25	Ord	15/04/2017	Graham Electonics		4149.09	4149.09 GBP	
	24	Ord	11/04/2017	Hausser GMBH		1975.16	1975.16 GBP	
Fixed assets	23	Ord	07/04/2017	The Video Rental Compar	ıy	2041.65	2041.65 GBP	
Departments	21	Ord	03/04/2017	F G Landscape & Design		11260.26	11260.26 GBP	
Projects	20	Ord	29/03/2017	Business Exhibitions		2166.61	2166.61 GBP	
	19	Ord	21/03/2017	Mikes Insurance Services		832.41	832.41 GBP	

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.

Ē									Pro	oduct	Sales (	Order									×
L Clear form		Remo row (	ove	Copy cell above (F6)	View iter (F3)	n Profi analy:		Complete	M	emorise	Recal	Delete	Quid print	Print		-					
	er ier nent patched		78 1 Wel Car	ter Young Turnberry R Iburry 'diff 4 3TY	toad									Type Date A/C*	*	Sales Or 11/10/2 YOU001	019 📅	Inv Re	ŧf	i <b>5</b> Item 2 d	of 3
													Custor	ner Ord	der No	. 271120	69				
				uct Code*		Descriptio					Quant	ity		rice £			t £		VAT £		
			CASC			ATX Mini 1 CDR 1043				c rive \$	·		1.00			20.00		20.00			3.60 34.20
			DISK			Disk - CDR				¢			5.00			8.00		40.00	_		7.20
			Deck	uction		Descript	lee			_		1	N	et £	Tota	al GBP £		225.00			45.00
				Value Discou	int	Descript						0				e GBP £		225.00			45.00
			<			1		111				Ŧ		>			Gross (			2	296.40
																	Euro €			3	346.79
																Less	Deposit G	BP £	0	2	296.40
																Amou	int Due G	3P £			0.00
								ŀ	•	•				▶	<b>⊳</b> I			S	Save	C	ose



Below is a previev	of the details of the global discount exclu	ıding VAT.	
Ē	Product Sales Ord	er	- 🗆 🗡
Clear form row (F7) row (F8) above (F	View item Profit Complete Memorise Recall De	elete Quick Print Send to print Excel	
Details Order Footer Payment Despatched Invoices Product Code CAS002 DISK002	Edit Iten       Details       Deduction Type       Net Value Discount       Description       Comment 1       Comment 2       Discount %       10.00 77       Disc. GBP £	Type Sales Order ♥ Order I Date* 11/10/2019   Inv Re A/C*   YOURD1   Y two N n Line	f Item 2 of 3
Deduction Net Value Disc <	10	> Gross GBP £ Euro € Less Deposit GBP £ Amount Due GBP £	45.00 4.40 296.40 346.79 296.40 0.00
	∢ ∢	S	ave Close

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

E		Product Sales Order			×
	emove	Edit Item Line	×	1	
form row (F7) ro		Details			
Details Order		Product Code CDR002	Units		
Footer	Pe 78 W	Description CDR 10432 Read/Write CD Drive			
Payment		Comment 1			55
Despatched	Ca	Comment 2		Inv Ref	
Invoices	C	Order Reference Orde	er Line Reference 0	Item No.	Item 2 of 3
		Values			
	Pro	Quantity 1.00 T Discount % 0.0000 T	Net GBP £ 190.00	VAT	_
	Pro CAS CDF	Unit Price GBP £ 190.00 T Disc. GBP £ 0.00 T	VAT GBP £ 34.20	20.00	3.60 34.20
	DIS	Posting Details	Item Status	40.00	7.20
		Nominal* 4000 v	Allocated 1.00		
		Tax Code T1 20.00 🗸	Despatched 0.00		
		Department 0 V Default	To Deliver 1.00		
			Intrastat 0.00		
	Dec	Additional Information	Due Date // 🎫	25.00	45.00
	Net			22.00	4.40
	<	Line Information		ΡĒ	296.40
		Calc. Net Discounts Price List	OK Cancel		346.79
				E O	296.40
			Amount Due G	3P £	0.00
		◀ ◀		Save	Close



*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.

<b></b>		Product Sales Order	- 🗆 🗙
Clear Profit Comp form analysis			
form analysis Details Order Payment Despatched Invoices	Pelivery Address         Pelivery Address         Peliver Young         78 Tumberry Road         Weburry         Cardiff         C34 3TY         Change         Tax Code:         Customer Order Details         Customer Contact         Peter Young         Order Taken By         Store (en) via test-loi         Custom Fields         Analysis1         Analysis3	Notes         UNS Number         DUNS Number         Sales Order Status         Alocation         Pull         Despatch         Due         // ==	
	l.	S	ave Close

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

<b></b>	Product Sales Order	- • ×
Clear Profit Completion	te Memorise Recall Delete Quick Print Send to Excel	
form analysis Details Order Poster Payment Despatched Invoices	print       Excel         Carriage       Tax Code       T1 20.00 $\checkmark$ VAT GBP £       4.40 $\bigcirc$ Gross GBP £       26.40         N/C       7009 $\checkmark$ Department       0 $\checkmark$ Default         Consign. No       Courier $\checkmark$ Settlement Terms         Days       0       Amount GBP £       0.00         Discount %       0.00       Total GBP £       296.40         Global         N/C $\checkmark$ Department         Tax Code       T0 0.00 $\checkmark$ Department       0 $\checkmark$ Default         Tax Code       To 0.00       Details         Tax Code       To 0.00 $\checkmark$ Department       0 $\checkmark$ Default         Tax Code       To 0.00 $\checkmark$ Department       0 $\checkmark$ Default         Tax Code       To 0.00 $\checkmark$ Department       0 $\checkmark$ Default         Tax Code       To 0.00 $\checkmark$ Department       Discourt Set (Set (Set (Set (Set (Set (Set (Set	
		Save Close



Below is	the "Payment Details" tab.
Ē	Product Sales Order – 🗆 🗙
	mplete Memorise Recal Delete Quick Print
Details Order Footer Payment Despatched Invoices	Payment Details         Payment Ref         Bank Account         I200         Payment Amount GBP £         296.40         Pay Deposit by Card         Amount Due         0.00    Payment Type           Payment already received           Post as Payment on Account (SA)
	Save Close

.

## 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 mai	n tab in the use	er account.												
Oxatis	Orders	Customers	Catalogue	Content	Marketing	Analytics	Configuration	Apps						
stomers : Paula A	omers : Paula Anderson - Update elements													
< Back 🕼 Ed	it 🖉 Duplicate	û Delete 🔚	Order list 🔹 🔊 L	ogin as a custom	er									
General Categ	gories Visibility	Referrals RFM cu	stomer rating Ta	arifs										
MAIN Addition	al Address Shippi	ing Address Addre	ess Book Billing a	nd Discounts										
Main Informati	on													
Customer typolog	gy: Individual													
Title:	Mrs													
First Name:	Paula													
Last name:	Anderson													
Email:	paula.anderson@o:	xatis.com												
Password:	******													
Company:	Oxatis													
Telephone:	+44 848 129 4800													
Fax:	+44 845 129 4812													
Language:	36													

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Below is the billing address tab in the user account.

)xati	S Orders	Customers	Catalogue	Content	Marketing	Analytic	
omers : Paula	Anderson - Update e	lements					
< Back	Edit Duplicate	Delete I≡	Order list 🔹 Lo	ogin as a custom	er		
General Ca	tegories Visibility	Referrals RFM cus	stomer rating Ta	rifs			
Main Additio	nal ADDRESS Shipp	oing Address Addre	ess Book Billing a	nd Discounts			
Address							
Address:	37 Marylebone High Stre	et					
Town/City:	Picadilly						
Country:	United Kingdom						
County/State:							

Below is the shipping address tab in the user account.

Oxatis		Orders Customers		Catalogue	Content	Marketing	Analy
omers : Pau	la Anderso	<b>on</b> - Update el	ements				
< Back	් Edit	] Duplicate	i∎ Delete 🔚	Order list 🔹 L	ogin as a custom	er	
General	ategories	Visibility	Referrals RFM cu	stomer rating Ta	rifs		
Main Additi	ional Addr	ess SHIPPI	NG ADDRESS Add	Iress Book Billing	and Discounts		
Shipping Ad	ldress						
Shipping Ad Title:	ldress Mr						
Title:	Mr						
Title: First Name:	Mr Gerald						
Title: First Name: Last name:	Mr Gerald	1 1287					
Title: First Name: Last name: Company:	Mr Gerald Mac						
Title: First Name: Last name: Company: Telephone:	Mr Gerald Mac +33 40 8411						
Title: First Name: Last name: Company: Telephone: Address:	Mr Gerald Mac +33 40 8411 172 Edison 5	Street					
Title: First Name: Last name: Company: Telephone: Address: Town/City:	Mr Gerald Mac +33 40 8411 172 Edison S Chester United King	Street					

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

0	Exporting Orders		- • ×
Export Results Consult the message errors and warnings below.			sage
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



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

Customer Record - Oxatis	- 🗆 🗙
 New New Delete Skype Google Maps	
order     project     Maps       Account Details     Contact Information       A/C*     DXAC1 v     Contact name       Company name     Oxatis     Trade contact	
Record 1 of 1	Save Close

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

	Ad	dress	
General		Contact Detail	s
Description*:	Sales order # 58	Contact name:	Gerald Mac
Address type:	Delivery address 🗸	Role:	
Notes:	^	Telephone:	+33 1 10 10 10 10
		Telephone 2:	
		Fax:	
Address		Email:	paula.anderson@oxatis.com
Company			
Street1	172 Edison Street	VAT Details	
Street2		Def. Tax Code:	то 0.00 🗸
Town	Chester	VAT Number:	
County	Cheshire	var Number:	
Post Code	CH1 4PL		
Country	United Kingdom GB 🗸		OK Cancel



### 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: <u>Connectors | Link for Sage 50 Accounts | Configuration</u>, then select the *Task Scheduler* tab.

In this tab, you can schedule your tasks.

Configuration		- 🗆 🗙
Sage 50 Accounts		
Task Name	Active	Next run
Download sales orders from Actinic website		
Export sales orders from DataPlug to Sage 50 Accounts 2019		
Import items from Sage 50 Accounts 2019 to DataPlug		
Upload images to Actinic website		
Upload items to Actinic website		
Import customers from Sage 50 Accounts 2019 to DataPlug		
Upload customers to Actinic website		
Scheduler Settings Monday Tuesday Wednesday Thursday Friday : Behavior: Start time: End time: Step:	Saturday 🗌	Sunday
Interval v 00:00:00 23:59:59 30	minutes	Save Settings OK  Cancel

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.



Ipload Download Export Connectors Tools ? Link for Sage 50 Accounts 2019 ۲ Configuration... 2 **0**% Excel/CSV/OpenScript schedulable ٠ Export Sales Orders..  $\mathbb{X}$ D **f** Import Items... Import Customers.. Tasks Task log... ۲ Ongoing tasks... Restart scheduler... Data transfer to Oxatis Stop scheduler... Import into the DataPlug Upload to Oxatis ٦ Q 216 0 Images A (t-t-t) Q 2 86 0 Products Upload all ()D Q 32 0 Customers

Below: If the scheduler is enabled, you can consult the tasks being executed and a log of previously executed tasks in the following menu: <u>Connectors | Link for Sage 50 Accounts | Tasks | Outgoing tasks</u>.

0						Oxatis DataPlug - test-	loic-en.oxatis.com				- • ×						
Site	Import	View	Upload	d Downloa	d Export Connecto	ors Tools ?											
≔	0	0		<b>\$</b> °		Oxatis DataPlug V930 X 1 > 0											
						Downloding sales or	ders in progress.										
						[Link for Sage 50 Accounts 2019]	<test-loic-en.oxati< td=""><td>s.com&gt; ×</td><td></td><td></td><td></td></test-loic-en.oxati<>	s.com> ×									
					Data trans	Ongoing tasks	Oxa <i>tis</i> DataPlug										
						Task name											
						Download sales orders from Actinic website		Running									
					Images	Export sales orders from DataPlug to Sage 50 Accounts	2019	Q	$\sim$								
						Import items from Sage 50 Accounts 2019 to DataPlug		Q	( <u>†-†-</u> †)								
					Products	Upload images to Actinic website	Ó										
					Products	Upload items to Actinic website		Q	Upload all								
						Import customers from Sage 50 Accounts 2019 to DataF	lug	Ф									
					Customer	Upload customers to Actinic website		Q	0								
											_						
					Oxatis Sal												
					Download	Export	Synchroniza	ation	Upload to Oxatis								
					<b>Q</b>	4 🕜 0		Q 4	0								

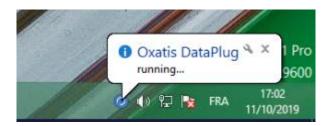
Below: Consultation of tasks being executed by the scheduler (enabled tasks are running in green).



#### Below: Consultation of the scheduler task log.

0								Ox	atis Data	aPlug - test-loid	c-en.oxatis.com							J ×
Site	Import	View	Upload	Download	Export	Connectors	Tools	?										
≔	0	0	<u>ې</u> م	0.0				С	)×a·	Dat منا	aPlug v9.30			$\mathbb{X}$	Ð	$\triangleright$	$\oslash$	φ.
		Scheduler task log <test-loic-en.oxatis.com></test-loic-en.oxatis.com>													×			
			onnector		Task n					Start date	End date	Succeeded	32 of 32 customer(s) were importe	d.				
						customers from		counts 2019 to	o Data	11/10/2019 17:01	11/10/2019 17:01	✓						
		Lin	k for Sage 50	Accounts 201	Upload	items to Actinic	website			11/10/2019 17:00	11/10/2019 17:00	✓						
		Lin	k for Sage 50	Accounts 201	9 Upload	images to Actin	ic website			11/10/2019 17:00	11/10/2019 17:00	✓						
		Lin	k for Sage 50	Accounts 201	9 Import	items from Sage	50 Account	ts 2019 to Dat	taPlug	11/10/2019 17:00	11/10/2019 17:00	<ul><li>✓</li></ul>						
		Lin	k for Sage 50	Accounts 201	Export	sales orders fro	m DataPlug	to Sage 50 Ac	counts	11/10/2019 16:59	11/10/2019 16:59	✓						
		Lini	k for Sage 50	Accounts 201	Downlo	ad sales orders	from Actini	: website		11/10/2019 16:59	11/10/2019 16:59	✓						

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.

