



Magento Enterprise Link For Sage 100 ERP 2014

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Installation Instructions and Cautions

PLEASE NOTE: MAS 90 must already be installed on your system before installing any IIG enhancement. If not already done, perform your MAS 90 installation and setup now; then allow any updating to be accomplished automatically. Once MAS 90 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

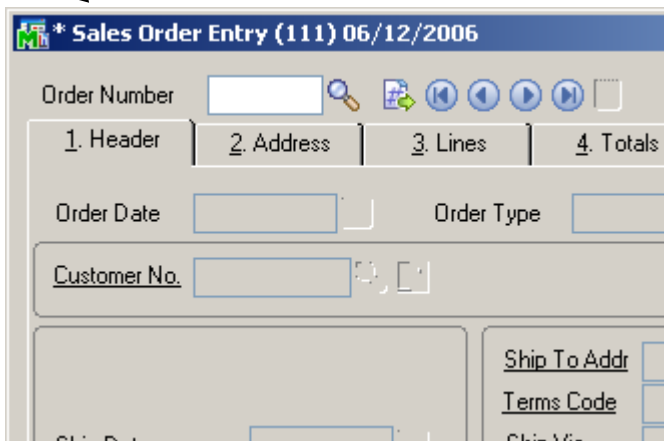
Wait! Before You Install – Do You Use CUSTOM OFFICE?

THIS IS AN IMPORTANT CAUTION: If you have Custom Office installed, **and** if you have modified any MAS 90 screens, you must run **Customizer Update** after you do an enhancement installation.

But wait! BEFORE you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the MAS 90.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

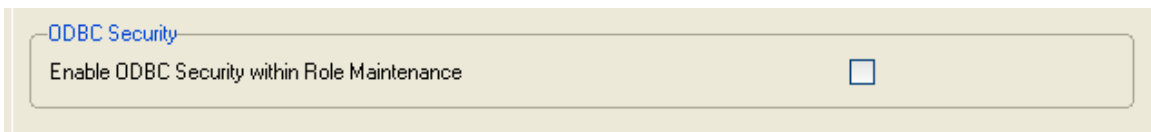
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

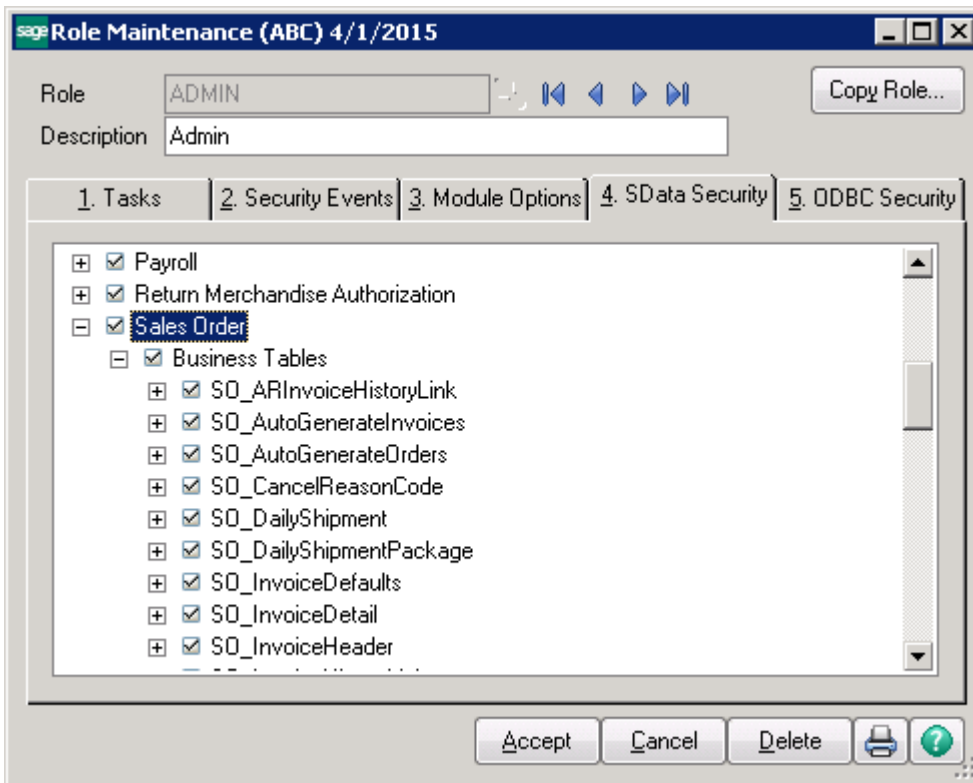
ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.



Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.



On the SData Security tab select the check boxes to assign SData security permissions and allow access to the following data tables:

- AR_Customer
- SO_SalesOrderHeader
- SO_SalesOrderDetail
- SY_SalesTaxClass
- SY_SalesTaxCodeDetail
- SY_SalesTaxSchedule
- SY_SalesTaxScheduleDetail
- SY_SalesTaxScheduleStateXRef
- SY_SalesTaxScheduleZipXRef

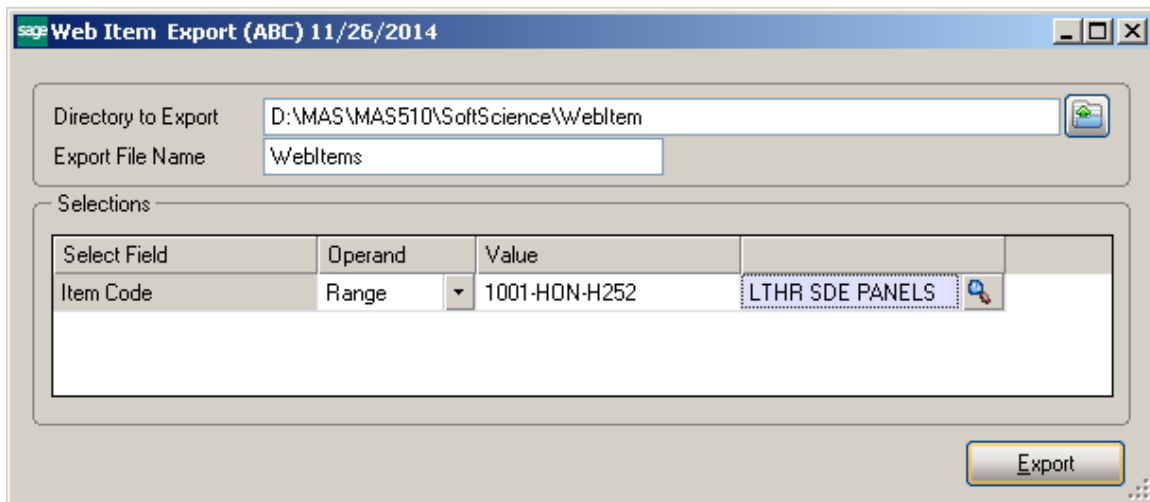
Introduction

This enhancement allows for transfer of Sales Order and Inventory data between Sage 100 ERP system and Magento. The transfer of data is implemented by CSV files, Sage SData API and Magento SOAP API.

Integration Part in MAS90

Web Item Export

The **Web Item Export** program has been added to the **Inventory Management Main** menu to allow exporting corresponding records from Item Master file.



Directory To Export- Select/enter the path for the export file. Make sure a valid directory is specified. Once a proper export directory has been selected it will be defaulted during the next session.

Note: If you are running Sage ERP MAS 200 a UNC path must be entered.

Export File Name- enter the file name without any extension.

Click **Export**. The records will be exported into the specified file in a comma delimited format (CSV). The structure of the Export file is as follows:

1	2	3	4	5	6
1	store	sku	qty	is_in_stock	type
2	admin	1001-HON-H252	2,680.00	1	simple
3	admin	1001-HON-H252LK	73	1	simple
4	admin	1001-HON-H254	86	1	simple
5	admin	1001-HON-H254LK	52	1	simple
6	admin	2480-8-50	14,779.00	1	simple
7	admin	2481-5-50	675	1	simple
8	admin	2551-3-50	650	1	simple
9	admin	3/25/2568	925	1	simple
10	admin	4886-18-14-3	94	1	simple
11	admin	6650-26-16-11	59	1	simple
12	admin	6652-28-24-15	25	1	simple

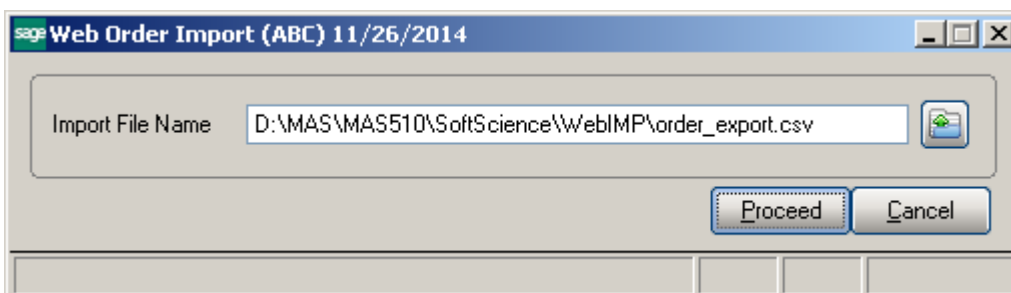
Sku- is the Item Number

Qty- is the Item Quantity On Hand from IM_ItemWarehouse table for “000” warehouse.

Is-in_stock- is 0 if Qty <=0 and is 1 if Qty > 0.

Web Order Import

The **Web Order Import** program has been added to the Sales Order Main menu to allow importing both Wholesale and Retail orders.



Note: If you are using Sage ERP MAS 200 a UNC path must be entered.

Import File Name - select or enter the path of the import file. Only .csv files are processed.

Click **Proceed** to process the selected file.
Here is the structure of the import file:

FIELD DESCRIPTION
1.Order Number <i>* is set as the "Customer PO"</i>
2.Order Date
3.Order Status
4.Order Purchased From
5.Order Payment Method <i>* is set as the Order Header Comment</i>
6.Order Shipping Method <i>* the Ship Via code assigned to the Web Shipping Method. See Shipping Rate Maintenance for details</i>
7.Order Subtotal
8.Order Tax
9.Order Shipping <i>* is set as the Freight. If it is zero and the Order is retail order "Free" will be assigned to the corresponding UDF</i>
10.Order Discount

* is set as the order discount (total tab).

- 11.Order Grand Total
- 12.Order Paid
- 13.Order Refunded
- 14.Order Due
- 15.Gift Certificate Code
- 16.Gift Certificate Redeemed Amount

* The Amount is added to the Order discount

- 17.Total Qty Items Ordered
- 18.Customer Name
- 19.Customer Email
- 20.Customer Number
- 21.Shipping Name
- 22.Shipping Company
- 23.Shipping Street
- 24.Shipping Street2
- 25.Shipping Street3
- 26.Shipping Zip
- 27.Shipping City
- 28.Shipping State
- 30.Shipping Country
- 31.Shipping Country Name
- 32.Shipping Phone Number
- 33.Billing Name
- 34.Billing Company
- 35.Billing Street
- 36.Billing Street2
- 37.Billing Street3
- 38.Billing Zip
- 39.Billing City
- 40.Billing State
- 41.Billing State Name
- 42.Billing Country
- 43.Billing Country Name
- 44.Billing Phone Number
- 45.Order Item Increment
- 46.Item Name
- 47.Item Status
- 48.Item SKU
- 49.Item Options
- 50.Item Original Price
- 51.Item Price
- 52.Item Qty Ordered
- 53.Item Qty Invoiced
- 54.Item Qty Shipped
- 55.Item Qty Canceled

- 56.Item Qty Refunded
- 57.Item Tax
- 58.Item Discount
- 59.Item Total

The import file for Wholesale and Retail Orders are similar just with a difference that the Customer number field is blank in the Retail order sample file.

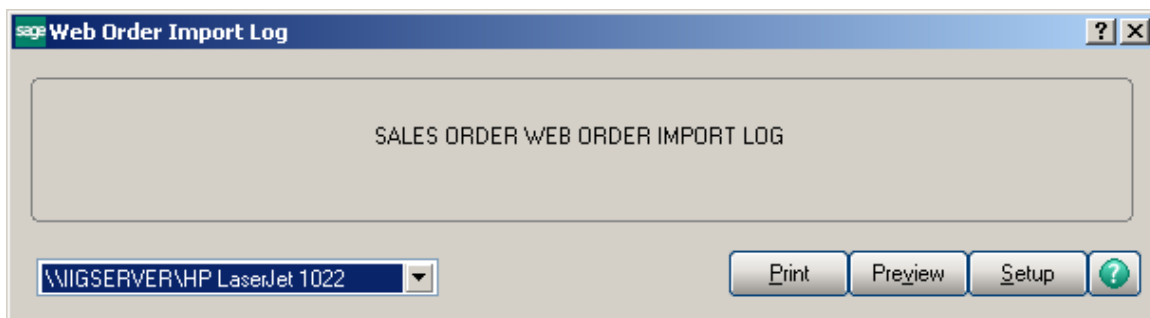
If the **Customer Number** field of the import file is not blank then the Order in the system is created just for that Customer (wholesale order).

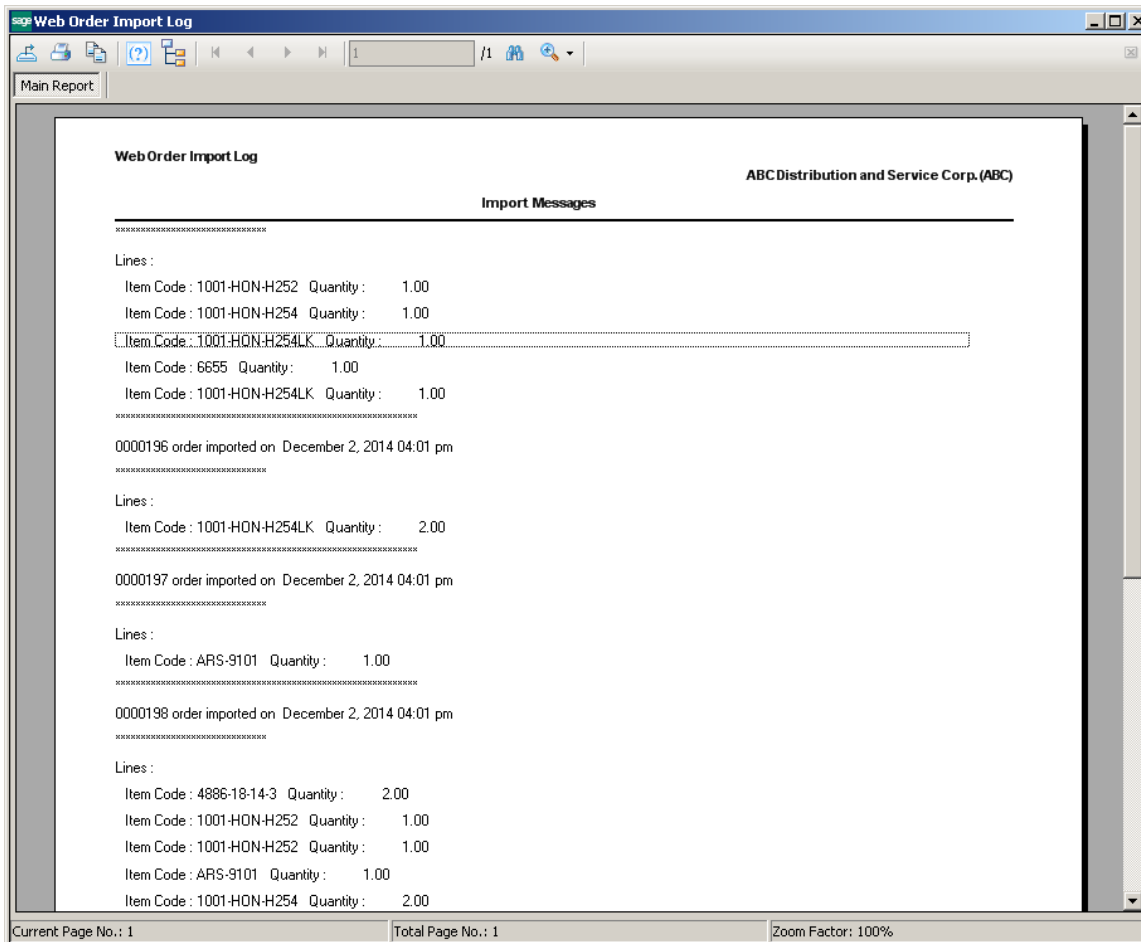
If the Customer Number field is blank then the program will search for the Customer's email in the system. If a Customer with email address matching the email address of the import file is found in the system then the Order will be created for that Customer.

If no Customer number with such email address is found in the system then new Customer will be created as follows: **"02"<first 4 digits of last name><first 3 digits of first name>**. In this case it is necessary to have **02-0000** salesperson setup in the system.

If a Customer with such number already exists in the system then sequential numbers starting from 1, 2, 3,...9, A, B...Z will be added at the end of the Customer number.

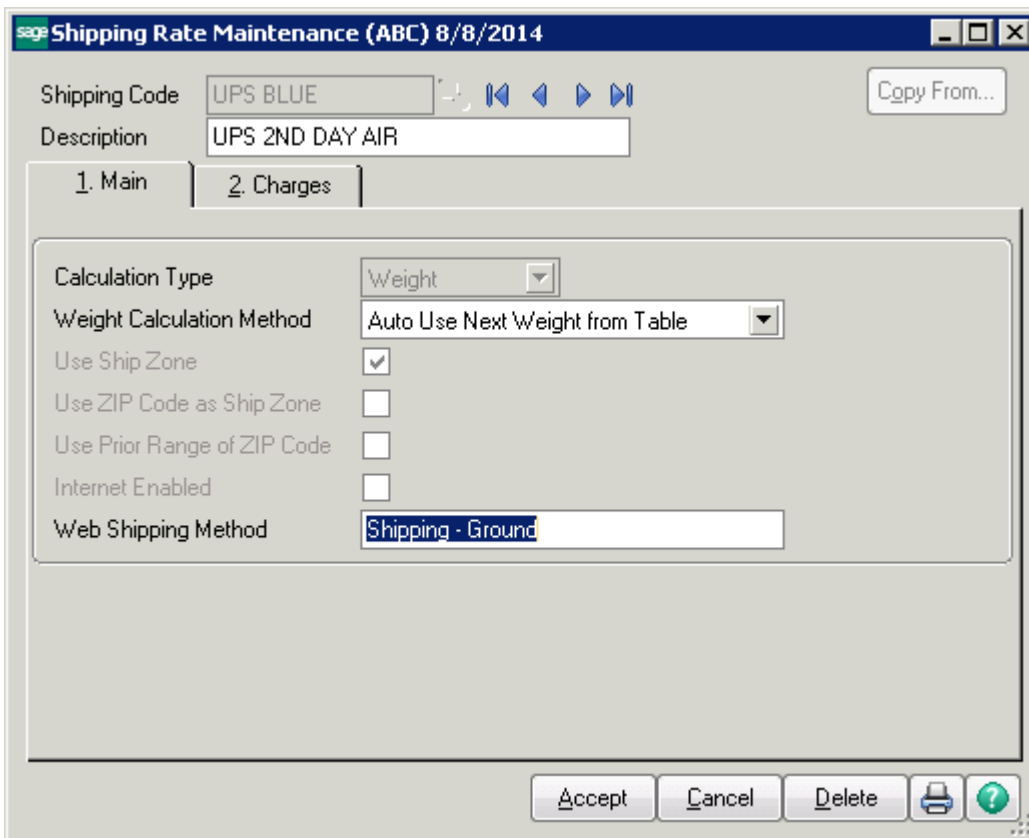
After the import is completed an import log is generated.





Shipping Rate Maintenance

The **Web Shipping Method** field has been added on the Main tab of the Shipping Rate Maintenance screen to allow the user to assign a Shipping Code for a Web Shipping method that will be used for setting the Ship Via code on the Orders imported by the Web Order Import program.



During import the program will search for a Shipping Code for corresponding "Order Shipping Method" specified in the import file and set it on the Order.

Magento Link Options

Select the **Magento Link Options** program from the **Common Information Setup** menu.

Magento Server Configuration:

In the **Magento Host** field enter the URL for the Magento Host

In the **SOAP API User Name** field enter your SOAP API User Name provided by Magento Administrator

In the **SOAP API Key** field enter your SOAP API Key provided by Magento Administrator

Magento Order Status Change:

In the **Magento Order Status** field enter the Status that will be applied when the order is invoiced in Sage 100 ERP system.

Note that the specified status should exist in Magento.

In the **Magento Order Comment** field enter the Magento Sales Order Status Comment that will be set when order in Sage100 ERP is invoiced.

Note that MAS90 Invoice No will be copied at the end of comment.

Sales Order Entry

Select the **Sales Order Entry** program in the **Sales Order Main** menu.

For each Order entered in Magento respective Sales Order Number is created in MAS system (by the Next Order Number) with the **Magento Order Number** visible on the Sales Order Header.

The Cust. PO field is populated with Magento Order Number.

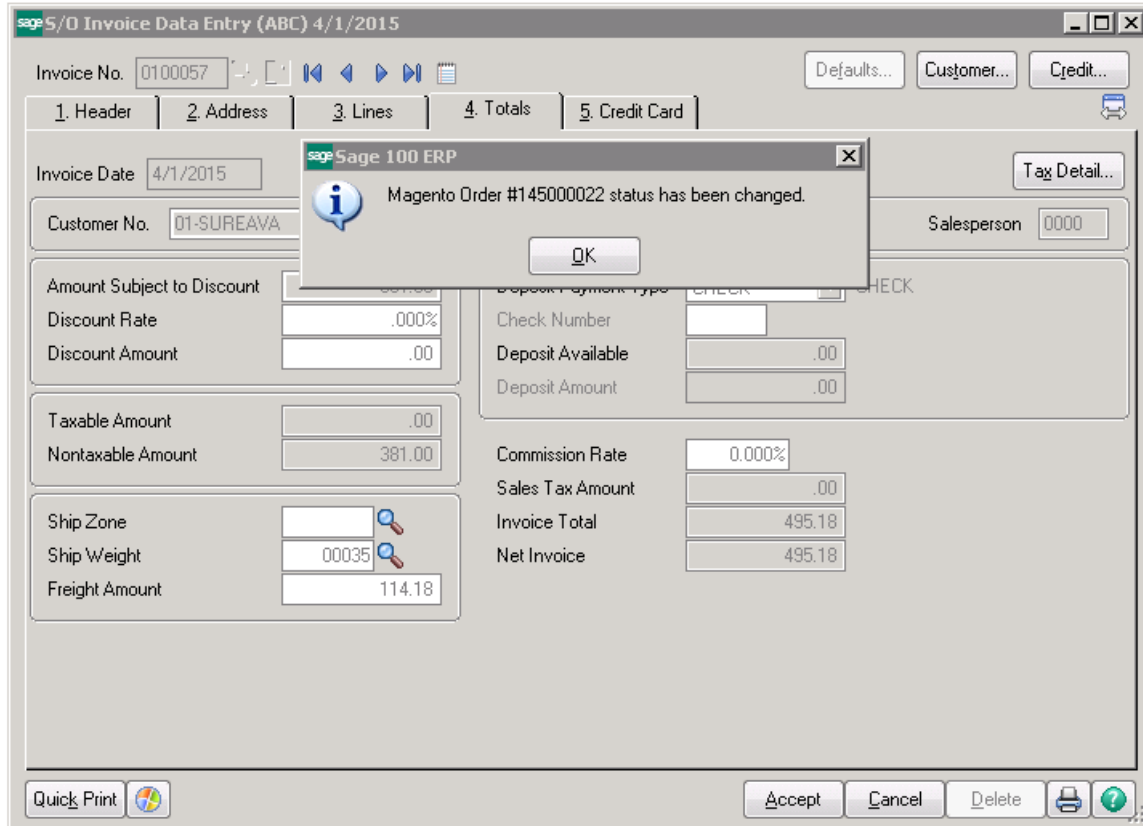
Invoice Data Entry

Select the **Invoice Data Entry** program in the **Sales Order Main** menu.

When Sales Order r is invoiced the Magento Order Number is displayed on the Invoice Header.

After accepting the Invoice a prompt appears about updating the Magento Order status.

The Order status is updated in Magento website with respective comment populated from Magento Link Options.



Integration Part in Magento

Setup in Magento

Magento Configuration

Login to Magento website admin panel and select Configuration from the System menu.

The screenshot shows the Magento Admin Panel interface. At the top, there is a navigation bar with the following tabs: Dashboard, Sales, Catalog, Mobile, Customers, Promotions, Newsletter, CMS, Reports, and System. The System menu is currently open, displaying a list of options including My Account, Notifications, Tools, Web Services, Design, Import/Export, Manage Currency, Transactional Emails, Custom Variables, Permissions, Magento Connect, Cache Management, Index Management, Manage Stores, Order Statuses, and Configuration. The Configuration option is highlighted in blue. Below the navigation bar, there is a warning message: "Latest Message: Reminder: Change Magento's default phone numbers and callouts before site launch". The main content area shows the Dashboard for the selected store view, "All Store Views". It displays three key metrics: Lifetime Sales of \$39,763.08, Average Orders of \$1,988.15, and a table of the Last 5 Orders. The table has columns for Customer, Items, and Grand Total, with entries for Jane Doe and Jay Smith.

The following page will be opened.

▶ SALES
Sales
Sales Emails
PDF Print-outs
Tax
Checkout
Shipping Settings
Shipping Methods
Google API
Payment Methods
Payment Services
Moneybookers
▶ SAGE 100/MAS90 INTEGRATION
IIG Sage Extension
▶ SERVICES
Magento Core API
OAuth

The SAGE 100/MAS 90 INTEGRATION section has been added under the Configuration menu. Select the IIG Sage Extension link to open the following page:

The screenshot shows the Magento Admin Panel interface. At the top, there is a navigation bar with tabs for Dashboard, Sales, Catalog, Mobile, Customers, Promotions, Newsletter, CMS, Reports, and System (which is currently selected). A search bar and a 'Logged in as' indicator are also present. Below the navigation bar, there is a message area with a warning icon and a 'Latest Message' about changing default phone numbers. The main content area is divided into two sections: 'Current Configuration Scope' and 'IIG Sage Extension'. The 'Current Configuration Scope' section shows 'Default Config' selected and a 'Manage Stores' link. The 'IIG Sage Extension' section is further divided into 'Server Configuration' and 'Extension Settings'. The 'Server Configuration' section includes fields for Host Name (http://Sdata510), Company (ABC), User Name (iig), and Password (masked with dots). The 'Extension Settings' section includes fields for Division (01), SalesPerson (0000), Default Tax Schedule (NonTax), and Fully Paid (No). Each field has a '[STORE VIEW]' link to its right.

Server Configuration Section:

In the **Host Name** field enter **SData** host.

In the **Company** field enter a company that should use SData

In the **User Name** field enter a Sage 100 ERP User Name assigned to a Role with Sdata Security enabled.

In the **Password** field enter the password for current User to be used when connecting to Sage 100 ERP system.

Extension Settings:

In the **Division** field enter Division Number which should be used when creating customer in Sage 100 ERP.

In the **SalesPerson** field enter the Default Sales Person which should be assigned to the new customer in Sage 100 ERP (it is required).

In the **Default Tax Schedule** field enter the Default Tax Schedule that should be used for orders, if tax percents of products are different.

For creating fully paid order in Sage 100 ERP select “YES” from the **Fully Paid field** select box.

Transferring Fields from Magento to Sage100 ERP

The **Sales Order** fields of **Magento** are transferred to the **Sales Order** in **Sage 100 ERP** as shown in the table:

Sales Order of Magento	Sales Order of Sage 100 ERP
Order Id	Customer PO No
Order Date	Order Date
Customer Id	Customer No
Tax Information	Tax Schedule
Bill To City	BillToCity
Bill To Address	BillToAddress1
	BillToAddress2
	BillToAddress3
Ship To City	Ship To City
Ship To Address	ShipToAddress1
	ShipToAddress2
	ShipToAddress3
Order Discount Amount	Discount Amount
Order Shipping Amount	Freight Amount

The program checks if in Sage 100 ERP system exists the Tax Schedule with the MG[current_percent] name. If yes, this **Tax Schedule** will be applied on the Sales Order in **Sage 100 ERP** system. Otherwise a new **Tax Schedule /Tax Code** will be created with the same name in **Sage 100 ERP**.

If Order is successfully transferred from **Magento** to **Sage 100 ERP**, the following comment will be added to **Magento Order**:

□ **Apr 2, 2015 2:49:50 AM | Pending**
Customer **Not Notified**
Sage 100 ERP order #0000197

If **Magento Order** is invoiced in **Sage 100 ERP**, the following comment will be added to **Magento Order** (based in Sage100 ERP configuration).

□ **Apr 2, 2015 2:54:20 AM | Complete**
Customer **Not Notified**
MAS90 Invoice No:0100058