Address: Paradise Farm, High street | Kempsford | Fairford | Gloucestershire | GL7 4EU | UK
Company No. 05622862

Phone: +44 (0) 800 0112569

Email: info@datalinkuk.com

Internet: http://www.datalinkuk.com

User Manual

Magento v2 DataLink for Sage 50

Version 1.0

12 April 2018

Table of Contents

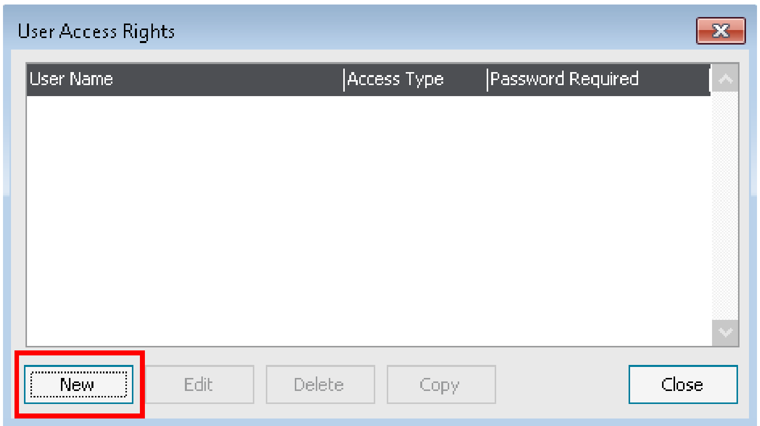
Settings and Configurations

To start working with DataLink software please check website and Sage 50 configurations first.

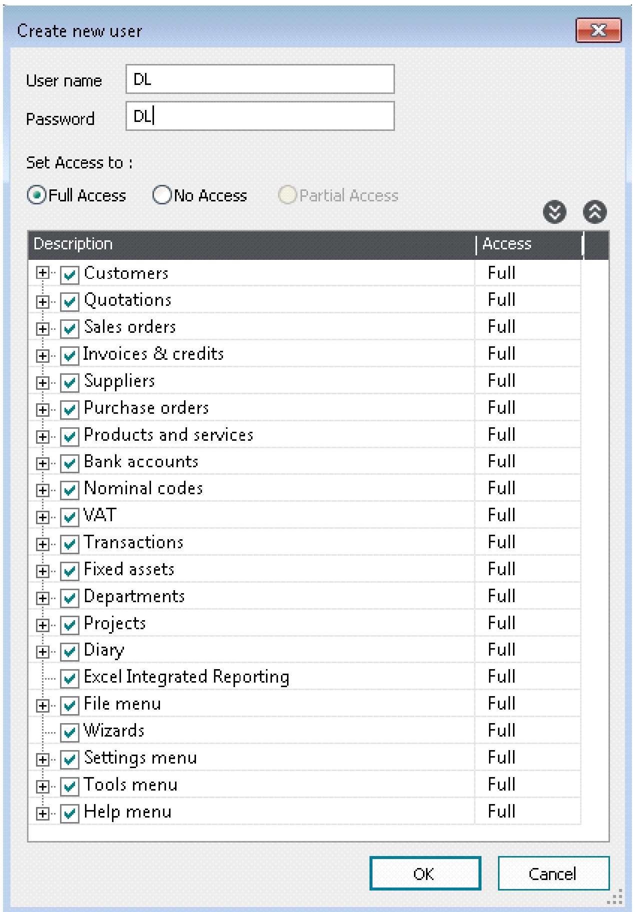
1.1 Sage 50 configurations

DataLink requires a user in Sage 50.

Open Sage and select required company, log in using 'manager ' account then select Settings->Access Right and press 'New'.



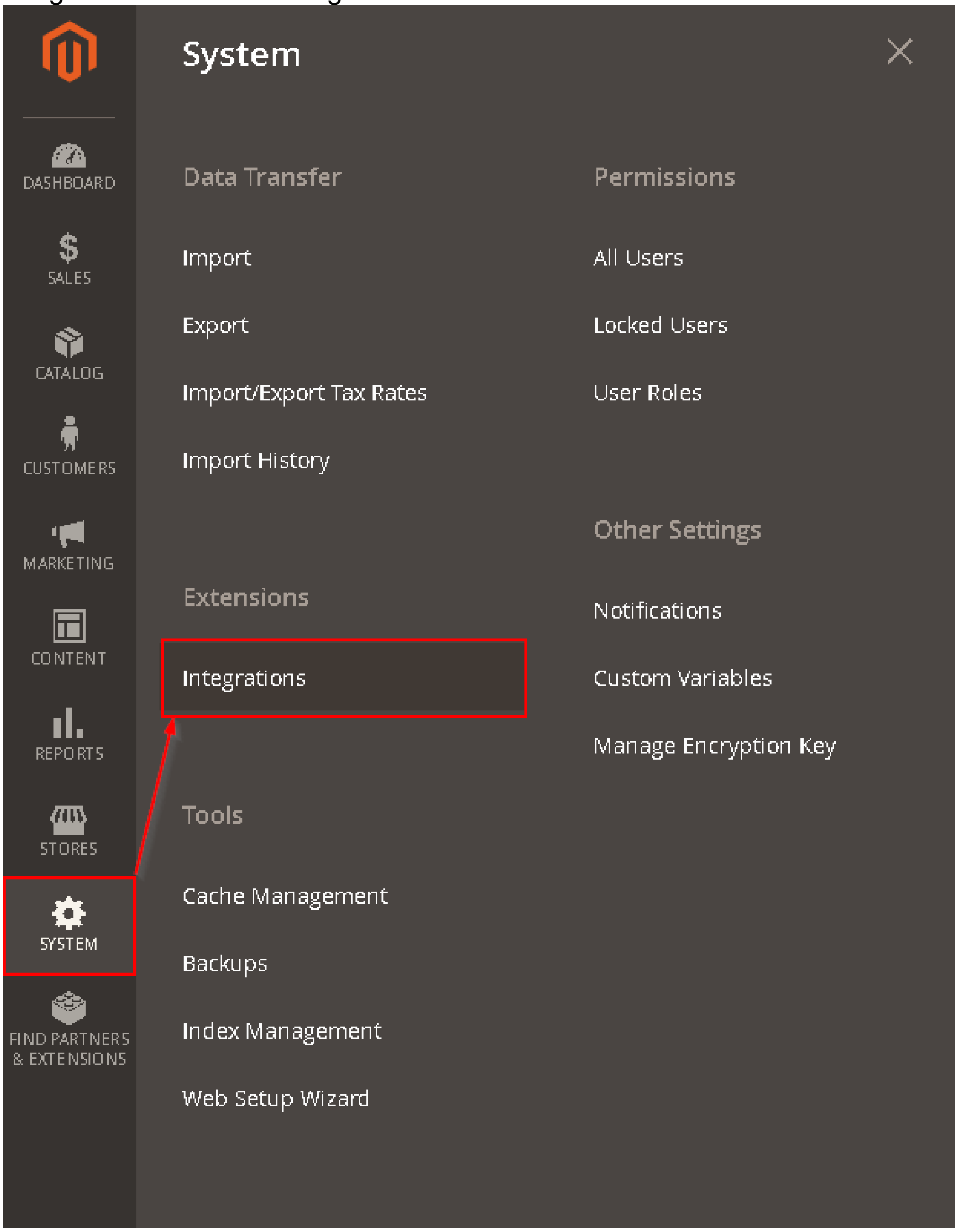
In 'Create new user' field type in :
User name : DataLink
Password : Datalink
Set Access to : Full Access



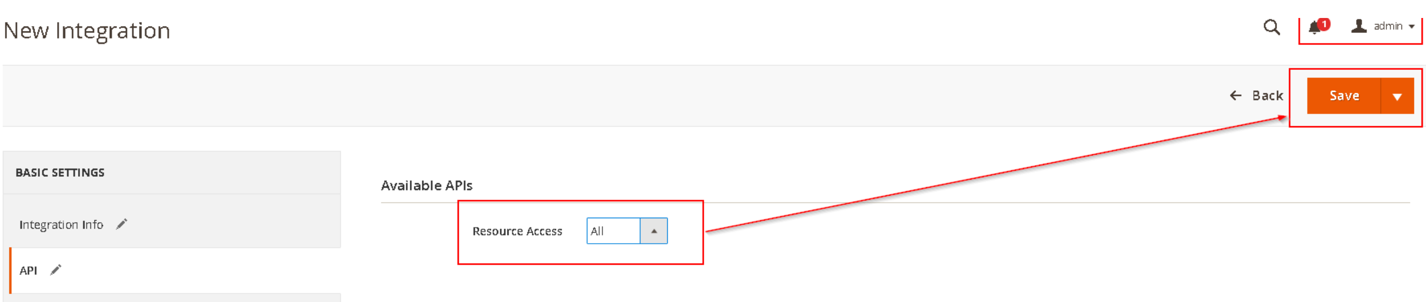
Press 'OK' button.

1.2 Website configurations

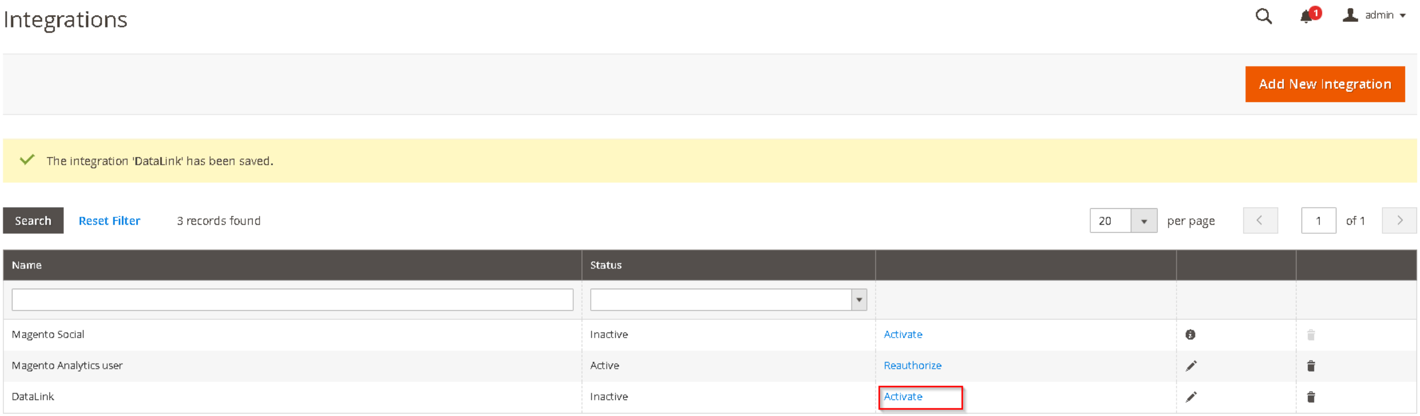
DataLink connector requires new integration keys. In the back office of Magento website go to left menu and select System->Integration->Add New Integration.



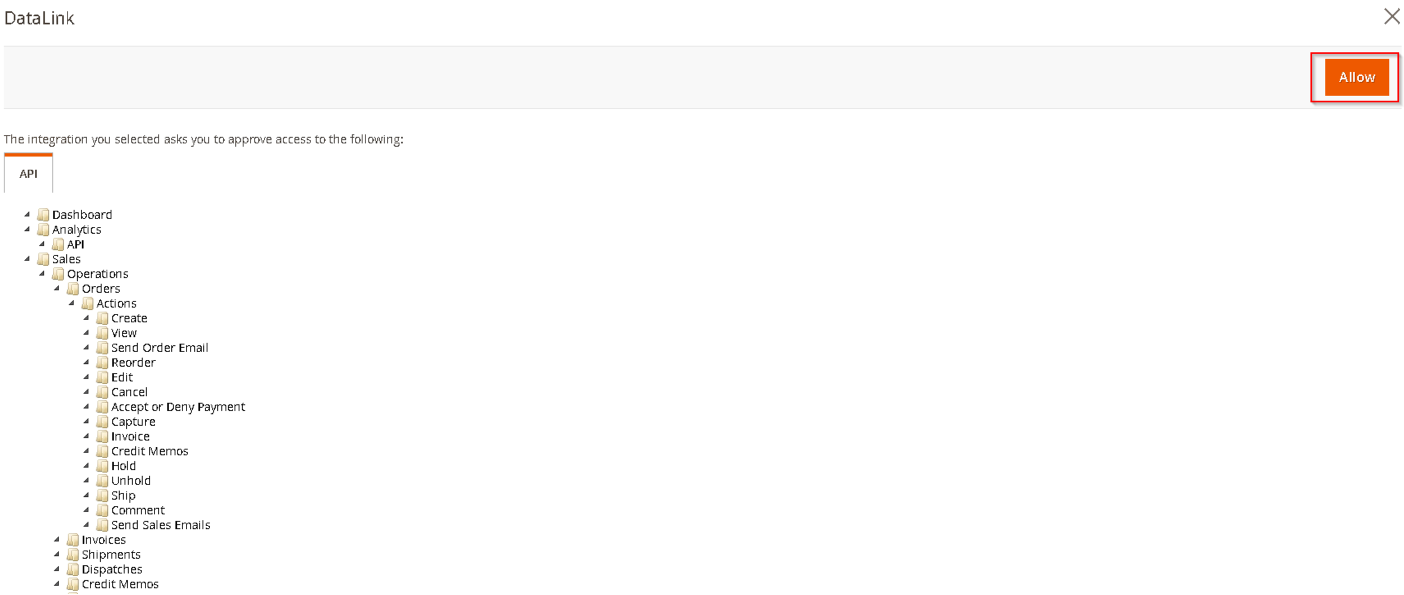
For new integration set 'DataLink' name, then select API tab.



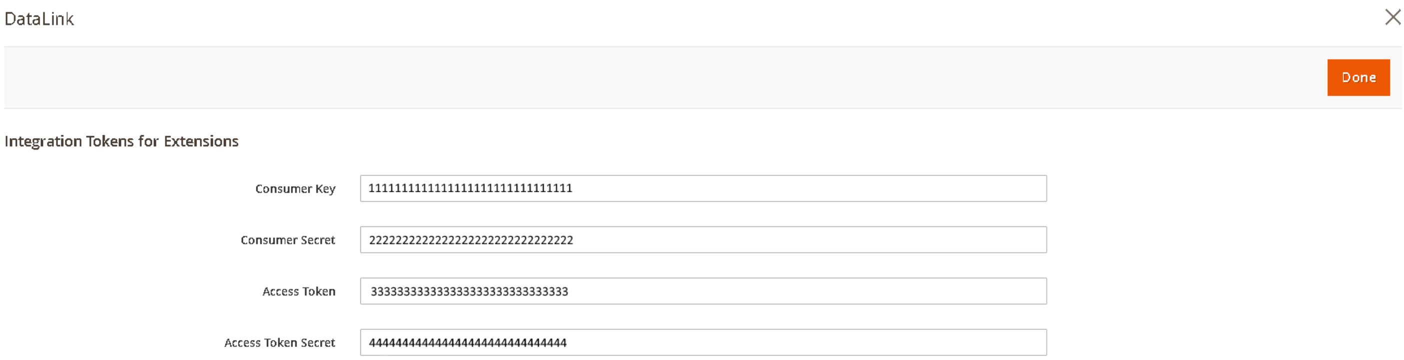
After you press 'Save' button new integration will appear in the list, however it is not active yet. For DataLink integration select 'Activate'.



In the new popup window select 'Allow'.



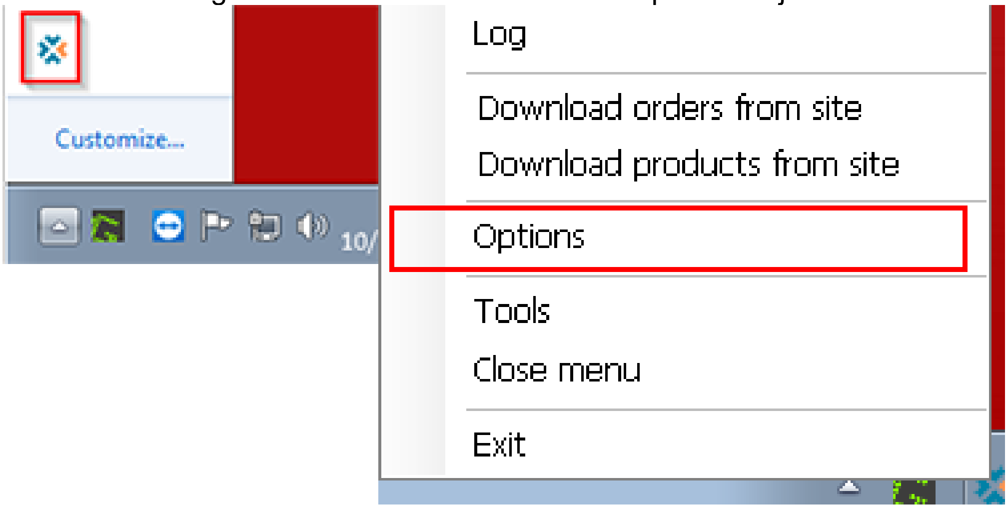
You will see integration keys and token once it is done.



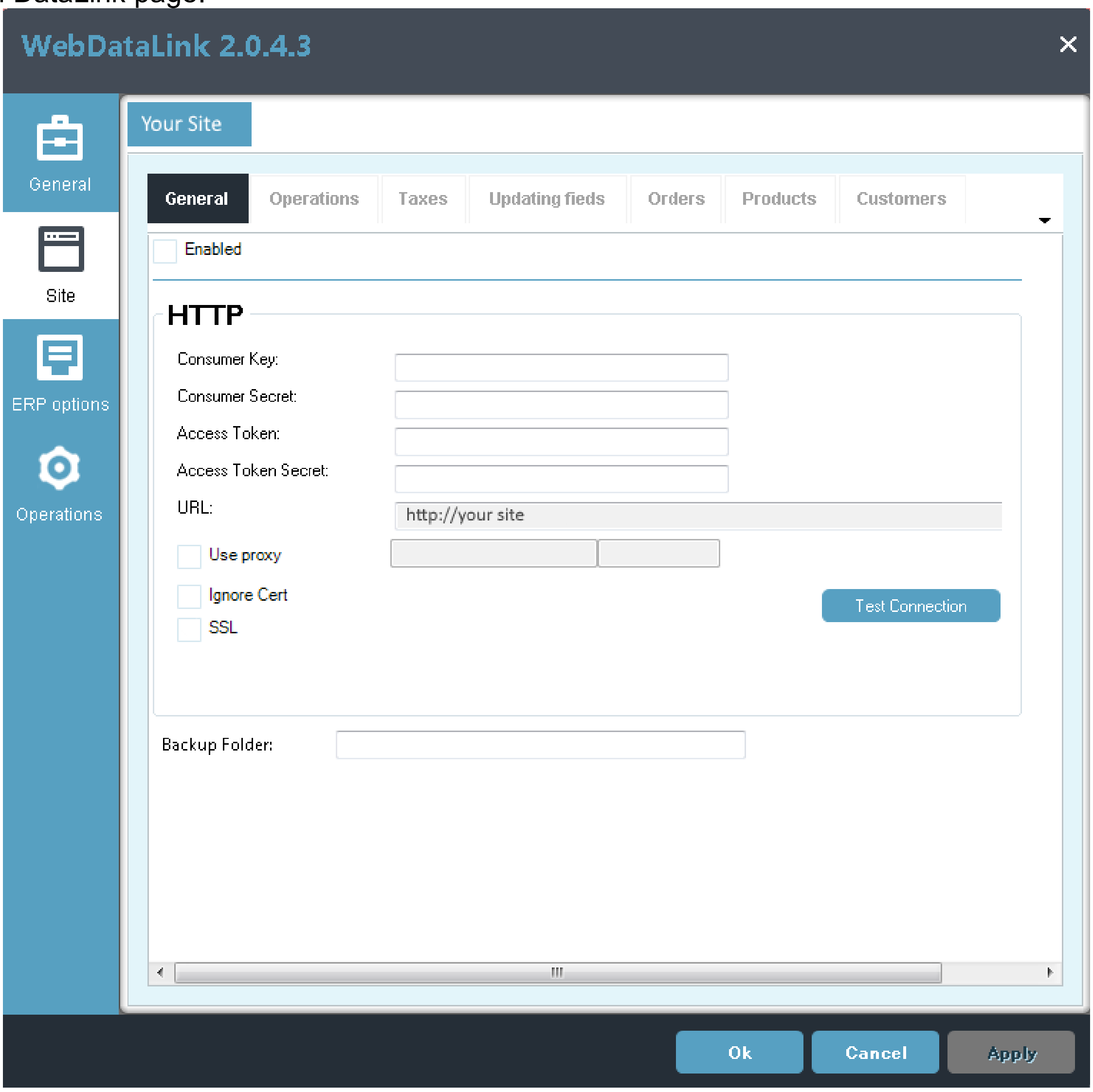
1.3 DataLink installation

Download and run DataLink software according to the installation wizard. By default DataLink window is minimized and sits in the system panel (tray).

To maximize DataLink window right-click on the icon and select ‘Options’ or just left-click on DataLink icon.



This is main DataLink page.



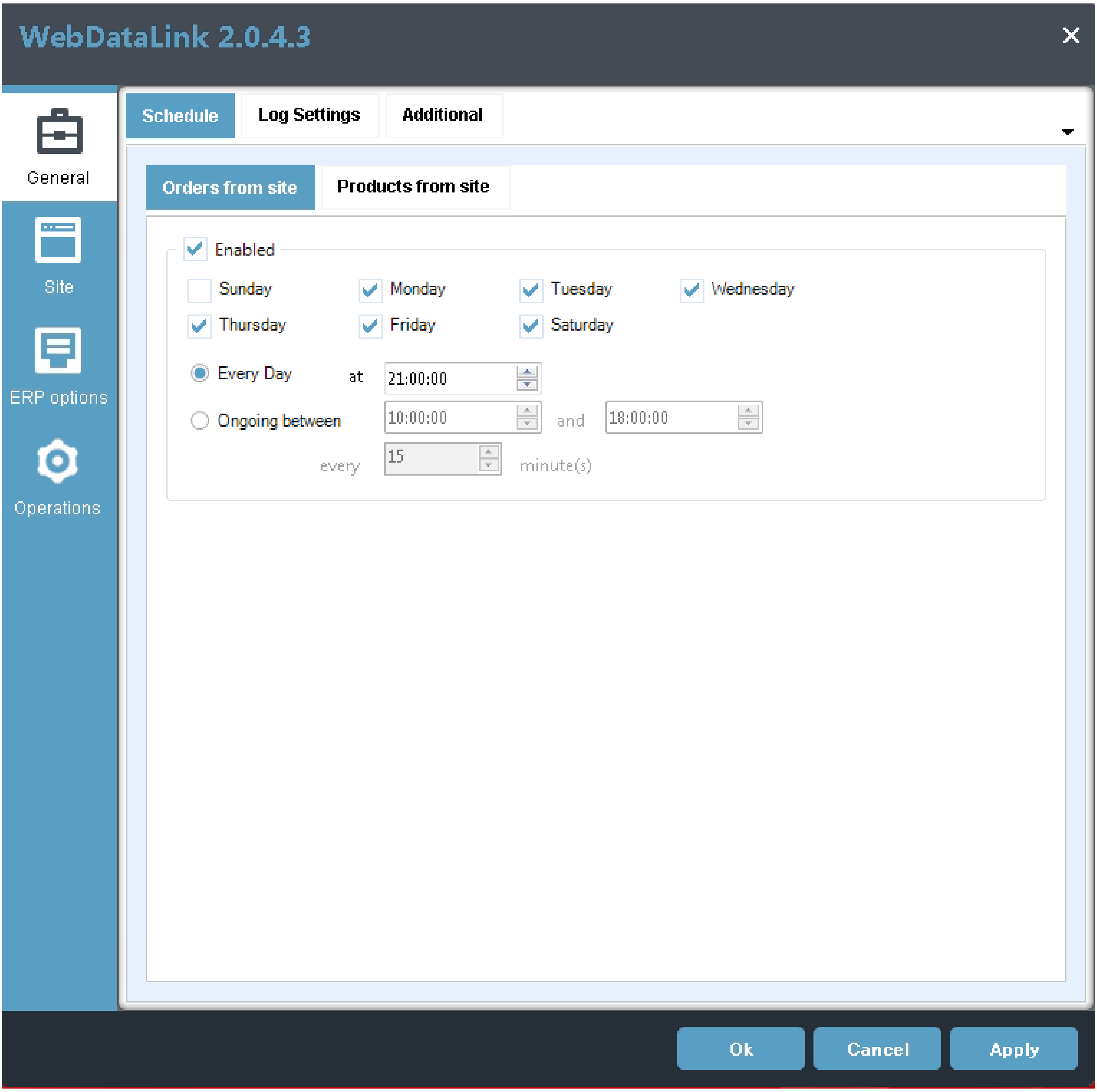
2. DataLink Options

2.1 General

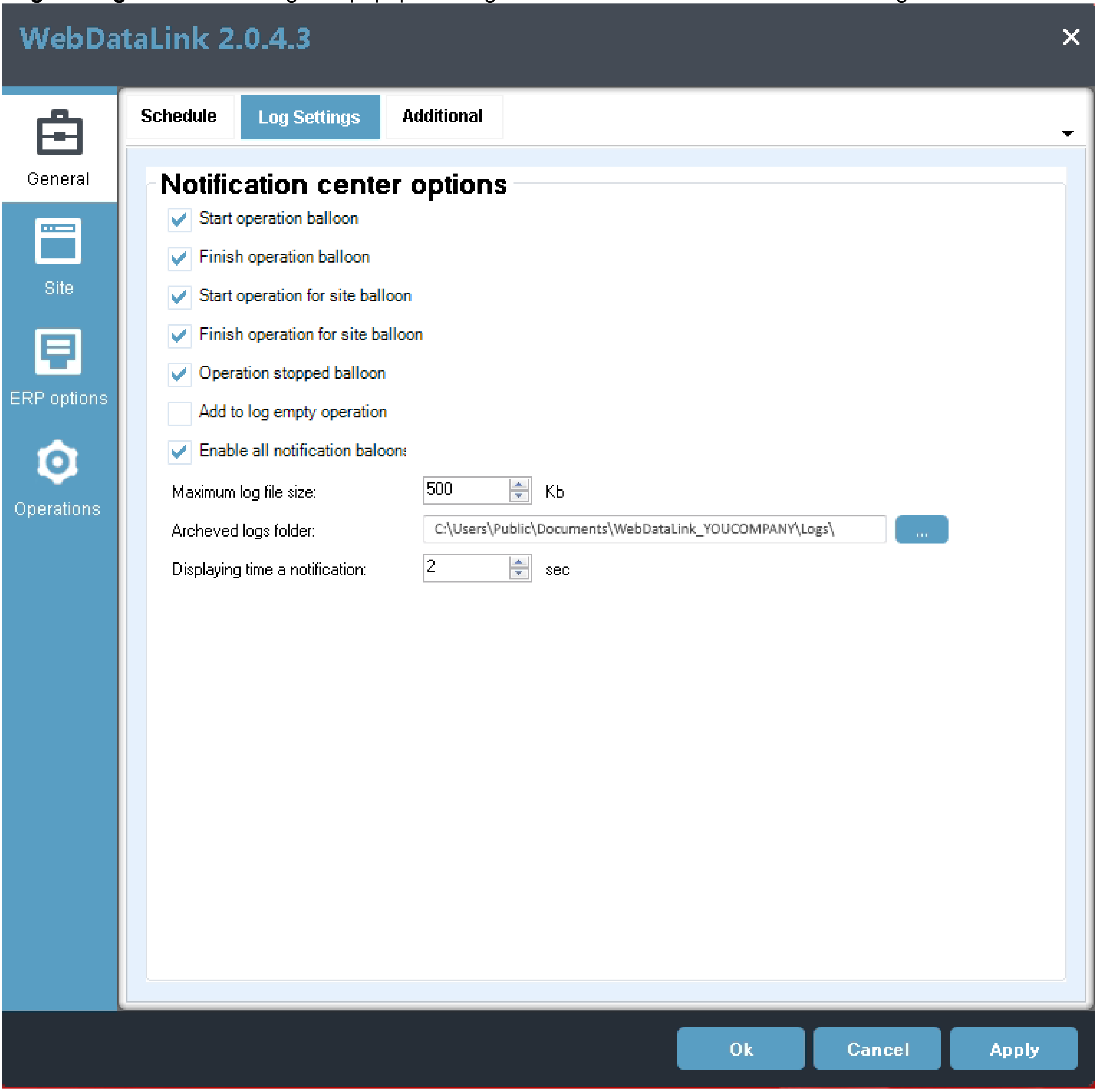
General tab has 3 main configuration options ‘Schedule’, ‘Log Settings’ and ‘Additional’.

Schedule – serves for setting up synchronization schedule for each available operation.

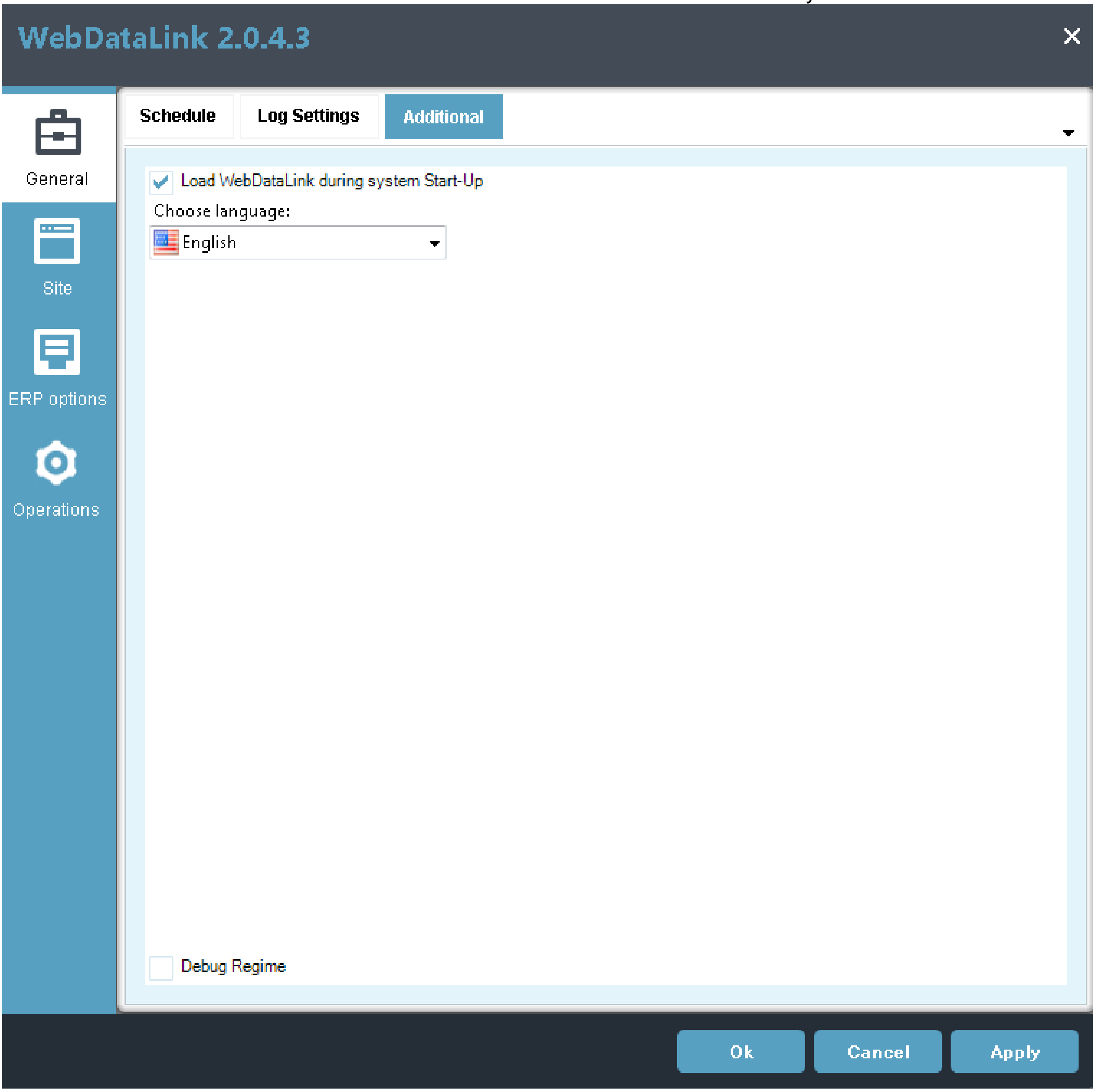
You can set specific day and time or select ‘Ongoing between’ and set required time, for example, every 15 minutes.



Log Settings – stores settings for popup messages. We recommend to use default settings.



Additional – there is a checkbox for automated DataLink launch with Windows system.

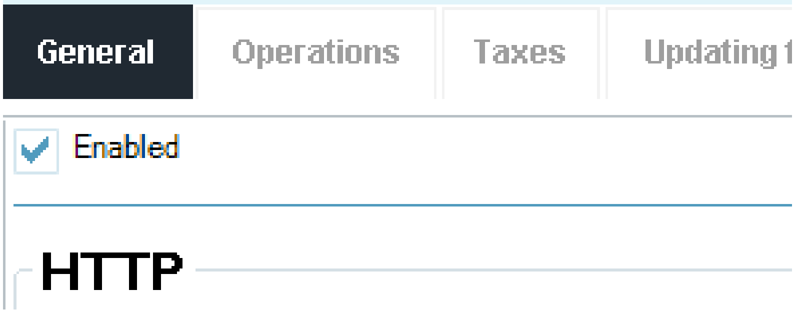


2.2 Site

‘Site’ tab of main menu has multiple configuration options, we would review them one by one.

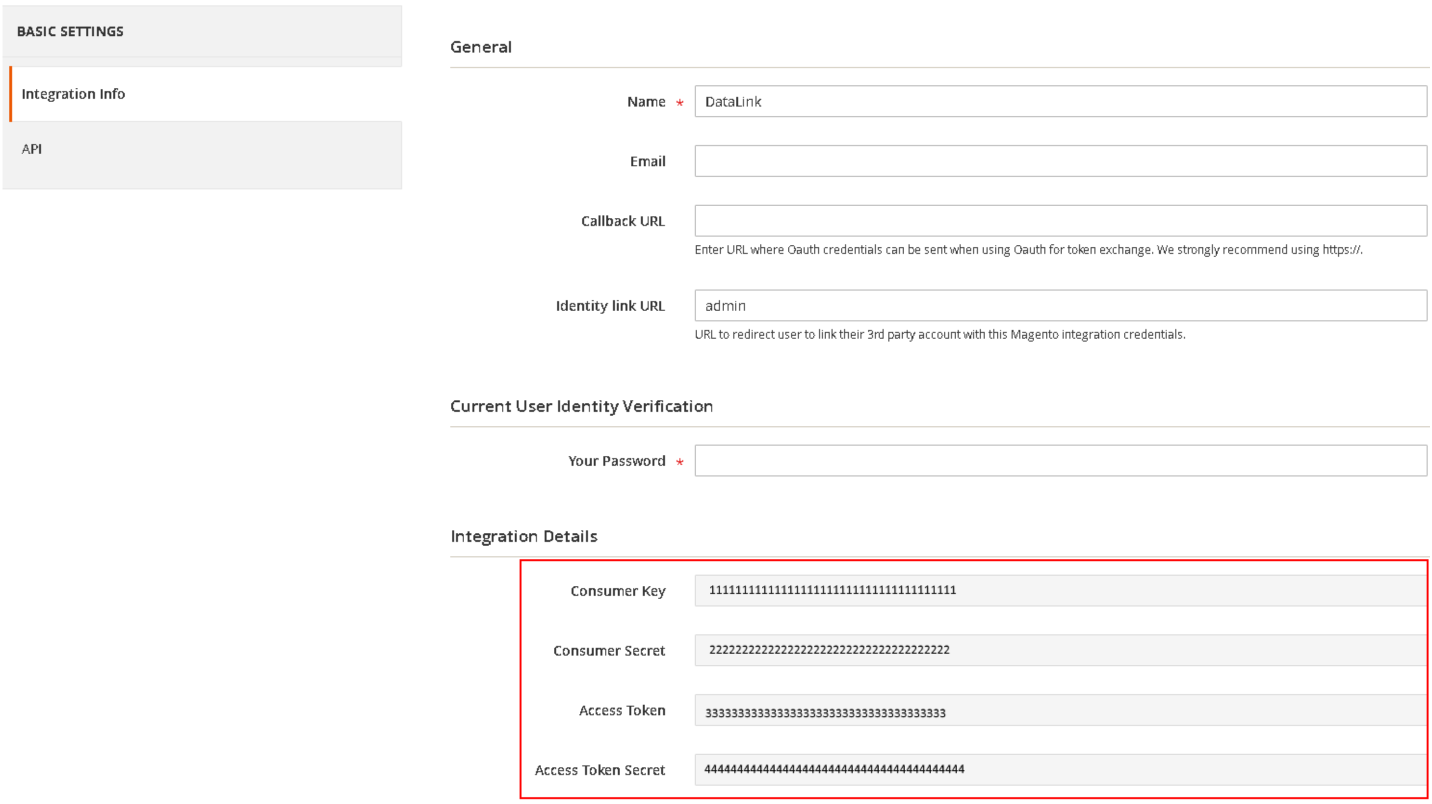
2.2.1 General

In this subtab you need to make sure that connection to the website is set properly. In order to enable connection to the website please make sure that 'Enabled' checkbox is ticked as per example below.



Next step is to set the website keys that we previously generated in Magento. (System->Integration)

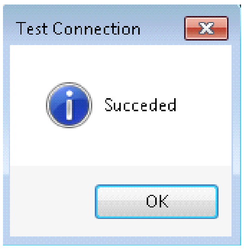
On the website admin panel select DataLink integration that you have previously created and press edit sign as is highlighted below.



Copy website keys into relevant DataLink fields.
URL field doesn’t change and always has a URL if your website.
You can also select and configure Proxy.

Ignore or activate SSL certificate. When this option is enabled DataLink is automatically changes URL from http:// to https://).

To save those settings press Apply button and then ‘Test Connection’.

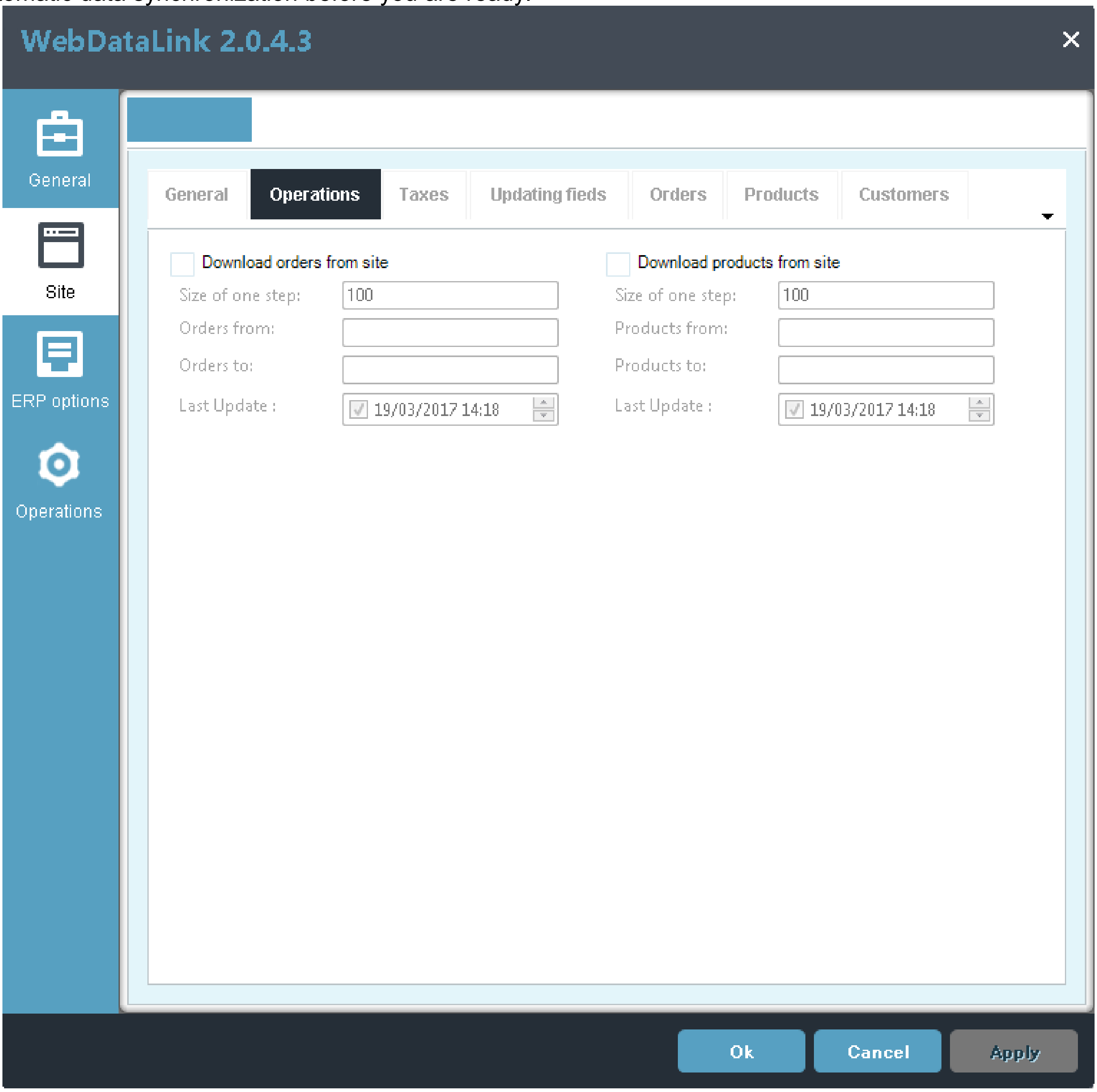


The following popup message means that you have successful connection to the website.

In case that you get error message, please go back and check all the fields one by one to make sure the data is set correctly.

2.2.2 Operations

You will see all available operations for your DataLink version, by default they all are disabled to prevent automatic data synchronization before you are ready.



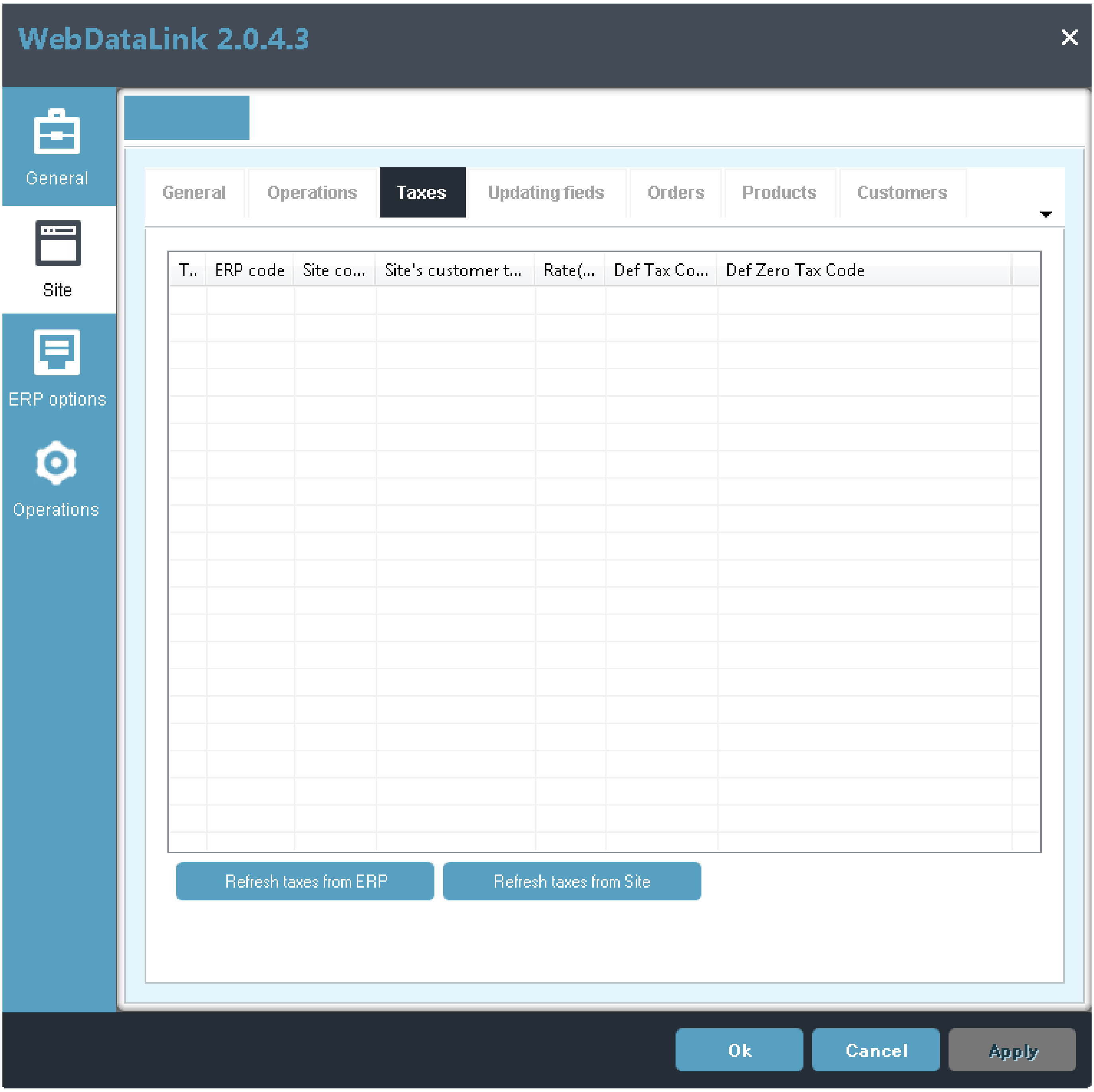
To activate any option tick relevant checkbox, then it is available for editing.
'Size of one step' – regulates a quantity of required objects (products, orders, etc.) requested in one step. By default it is set as 100.
'Orders from' – if you don't need all website orders being downloaded to Sage 50 you can specify the ID, starting from this ID DataLink will download orders.

Please note! For Magento v2 ID can be found in the order URL from the admin panel of the website: 'https://your site/admin/sales/order/view/order_id/3/'

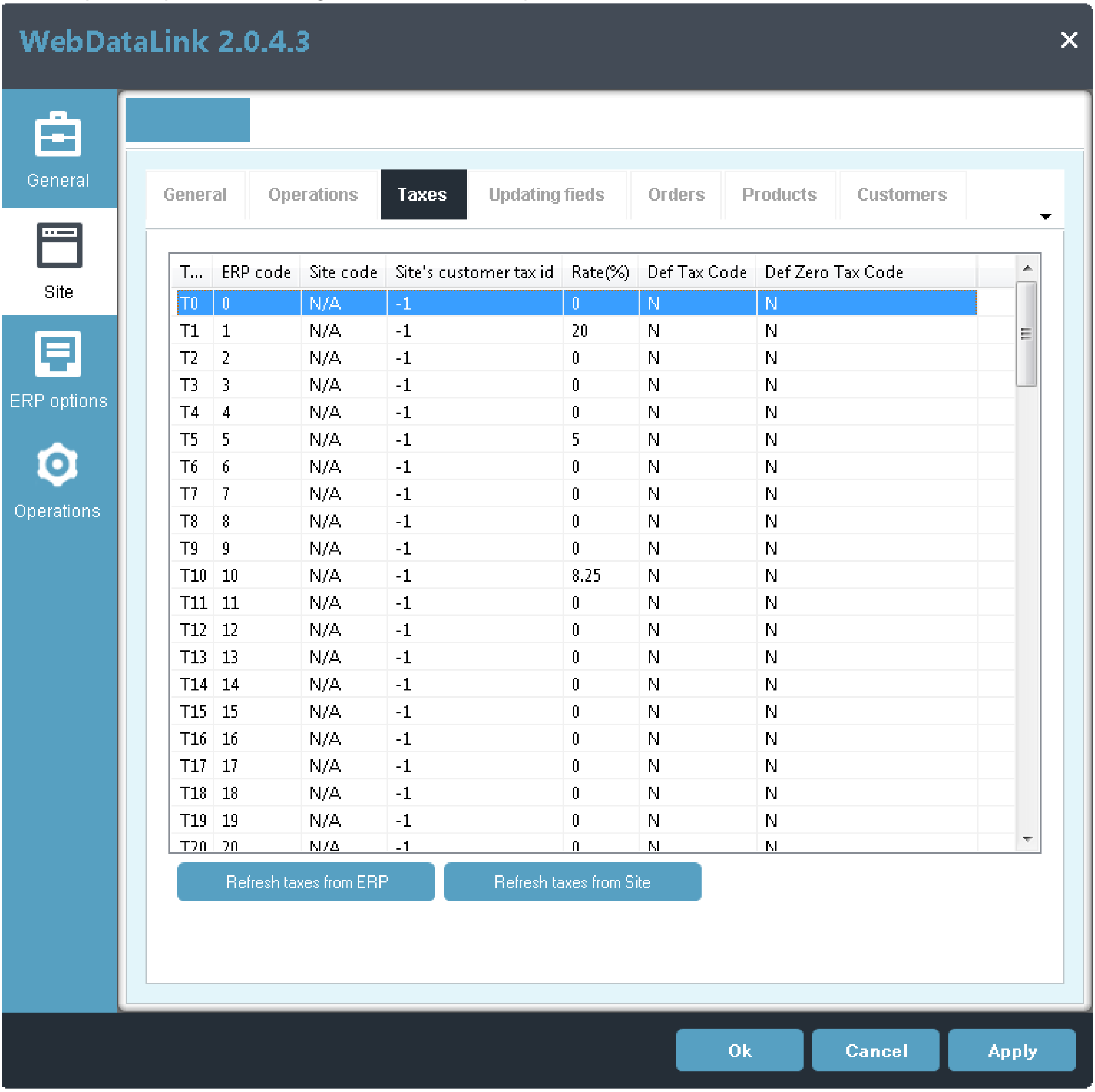
Also if you need to download sales starting from 3 ID, you need to set 2 in 'Orders from' field.
'Orders to' – sets the last order ID for download. To download all new sales this field should be empty.

'Last Update' - sets objects date for synchronization. For first synchronization recommended is to set date as one year ago.

2.2.3 Taxes



Tax settings should be uploaded from Sage 50. It can be done by pressing ‘Refresh taxes from ERP’ button. Next step is to upload tax settings from the website, press ‘Refresh taxes from Site’.

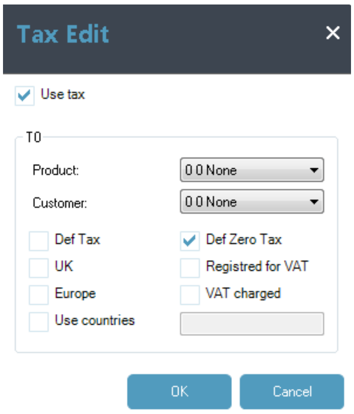


T...	ERP code	Site code	Site's customer tax id	Rate(%)	Def Tax Code	Def Zero Tax Code
T0	0	N/A	-1	0	N	N
T1	1	N/A	-1	20	N	N
T2	2	N/A	-1	0	N	N
T3	3	N/A	-1	0	N	N
T4	4	N/A	-1	0	N	N
T5	5	N/A	-1	5	N	N
T6	6	N/A	-1	0	N	N
T7	7	N/A	-1	0	N	N
T8	8	N/A	-1	0	N	N
T9	9	N/A	-1	0	N	N
T10	10	N/A	-1	8.25	N	N
T11	11	N/A	-1	0	N	N
T12	12	N/A	-1	0	N	N
T13	13	N/A	-1	0	N	N
T14	14	N/A	-1	0	N	N
T15	15	N/A	-1	0	N	N
T16	16	N/A	-1	0	N	N
T17	17	N/A	-1	0	N	N
T18	18	N/A	-1	0	N	N
T19	19	N/A	-1	0	N	N
T20	20	N/A	-1	0	N	N

Please note, while data is refreshing buttons are inactive.

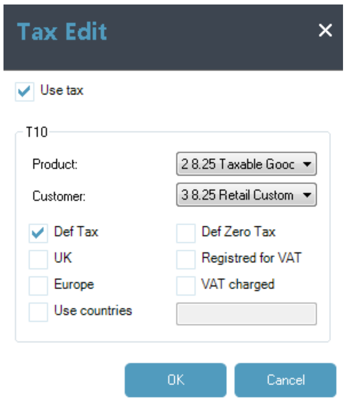
To link Sage 50 taxes with website taxes, double-click on the required tax line.

'T0' tax should be configured for each DataLink version, please make sure you have set this configuration using the following instructions.

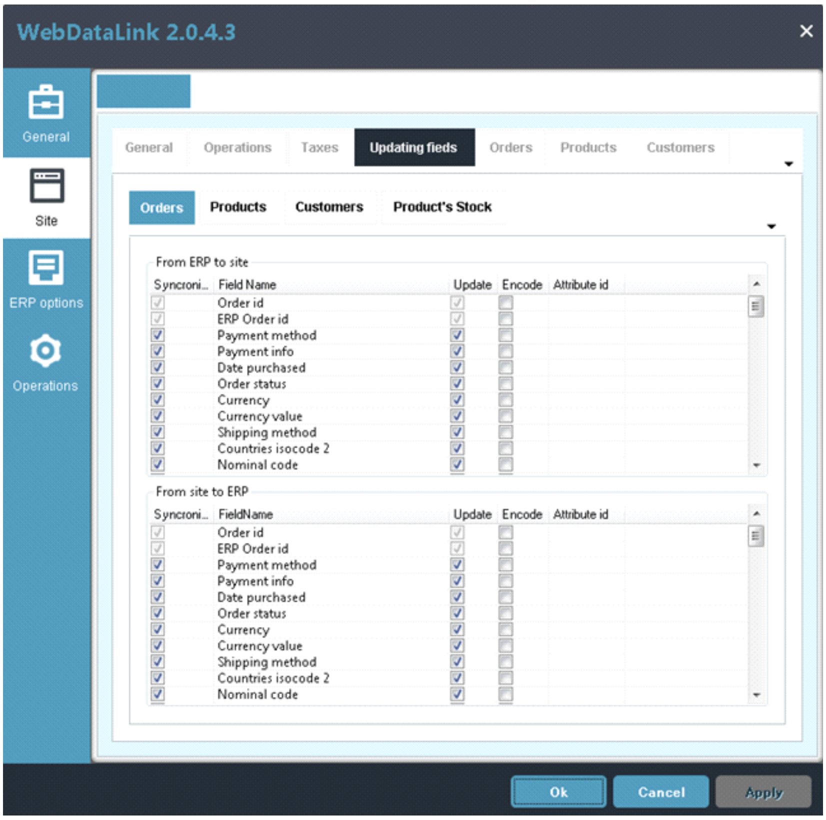


Tick 'Use tax" checkbox to enable tax settings configuration.

For zero tax set configurations as per the image above. For other taxes set configuration from dropdown list according to your preferences and set them as Def Tax.



2.2.4 Updating fields

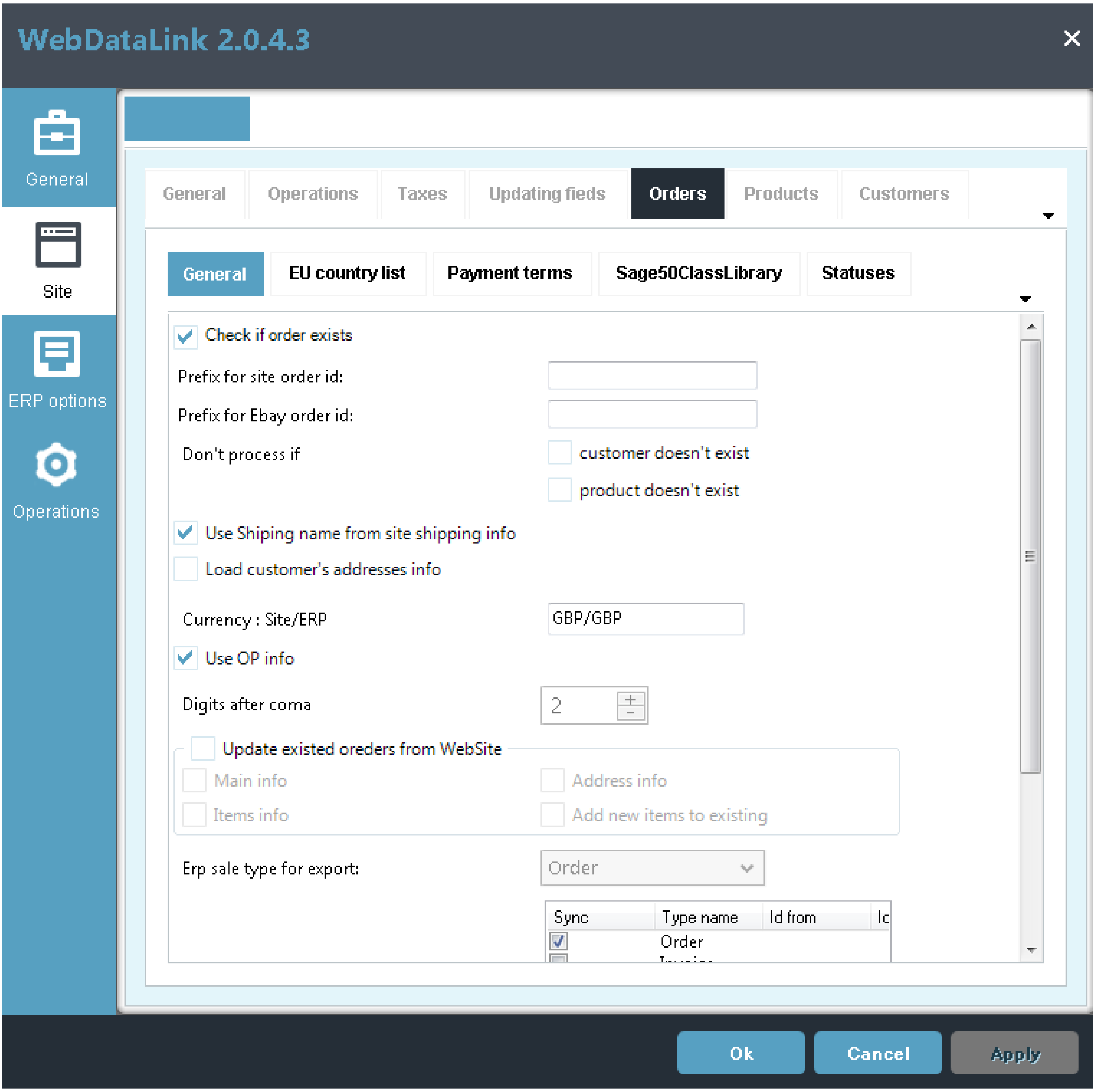


This menu contains 4 objects ‘Orders’, ‘Products’, ‘Customers’, “Stock’.

For each option you will see default list of fields available on the website and in Sage 50. Recommended fields are selected in default DataLink settings. You can edit them according to your preferences.

2.2.5 Orders
This submenu contains the following configuration options:

‘General’
‘EU country list’
‘Payment terms’
‘Sage50ClassLibrary’
‘Statuses’



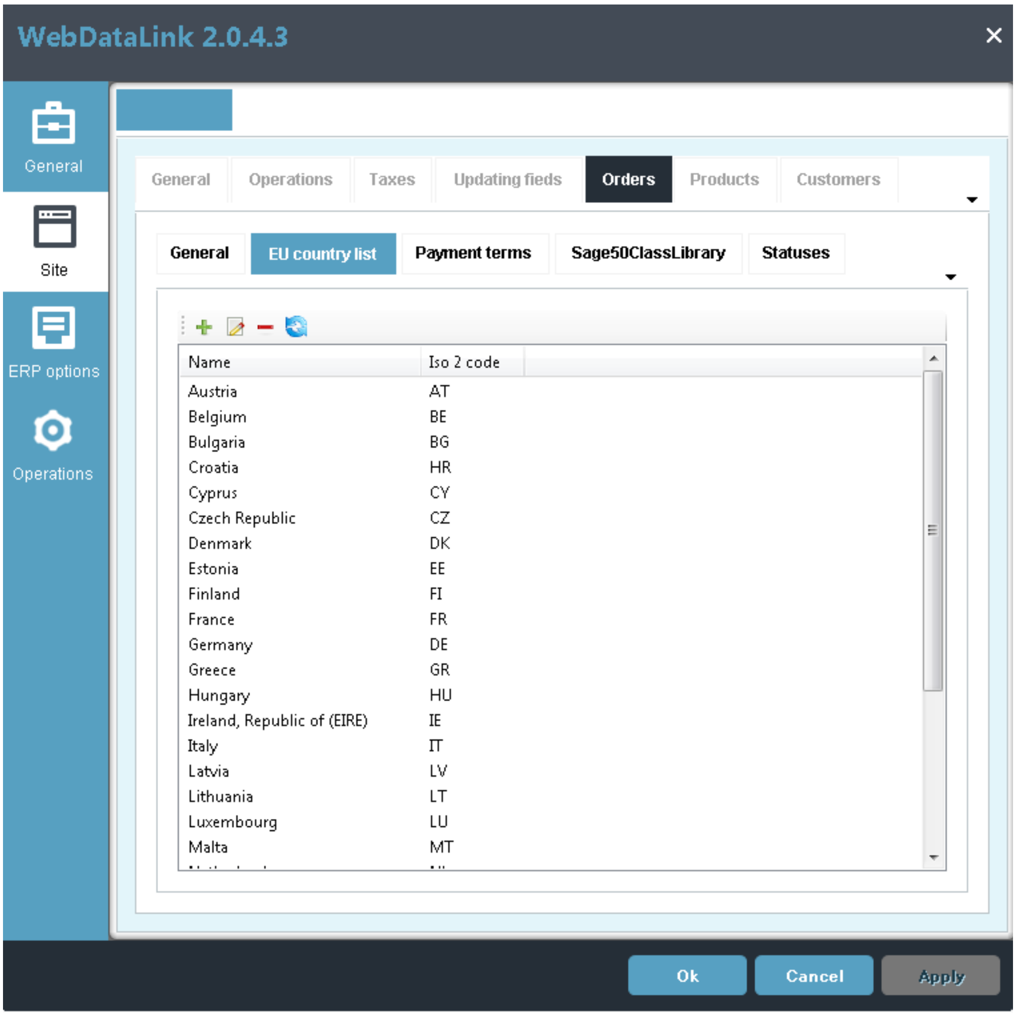
1) General tab of Site->Orders submenu

‘Check if order exists’ – Ignore this option, it is not applicable for Sage 50 connector.
‘Prefix for site order id’ – you can set a prefix for website sales order, it will be added when website sales are downloaded to Sage 50.
‘Prefix for Ebay order id’ - you can set a prefix for eBay sales order (if you have eBay orders begin downloaded to the website), it will be added when sales orders are downloaded to Sage 50.
‘Don’t process if’ - ignore this option for Sage 50 connector.
‘Use Shipping name from site shipping info’ - ignore this option for Sage 50 connector.
Load customer’s addresses info – is not applicable for current DataLink version
‘Currency : Site/ERP’ – (should be set for multicurrency option) serves to set default currency.
‘Use OP Info’ – when checkbox is empty product description from Sage 50 is main and is not updated from the order info; to update product description from the relevant website order tick the checkbox.

‘Digit after coma’ – sets amount of digits after coma.
‘Update existed orders from website’ – allows to select several update options for existing Sage 50 orders.
‘Erp sale type for export’ – if you have ‘Orders upload to website’ feature you can specify Sage 50 order type for this upload.

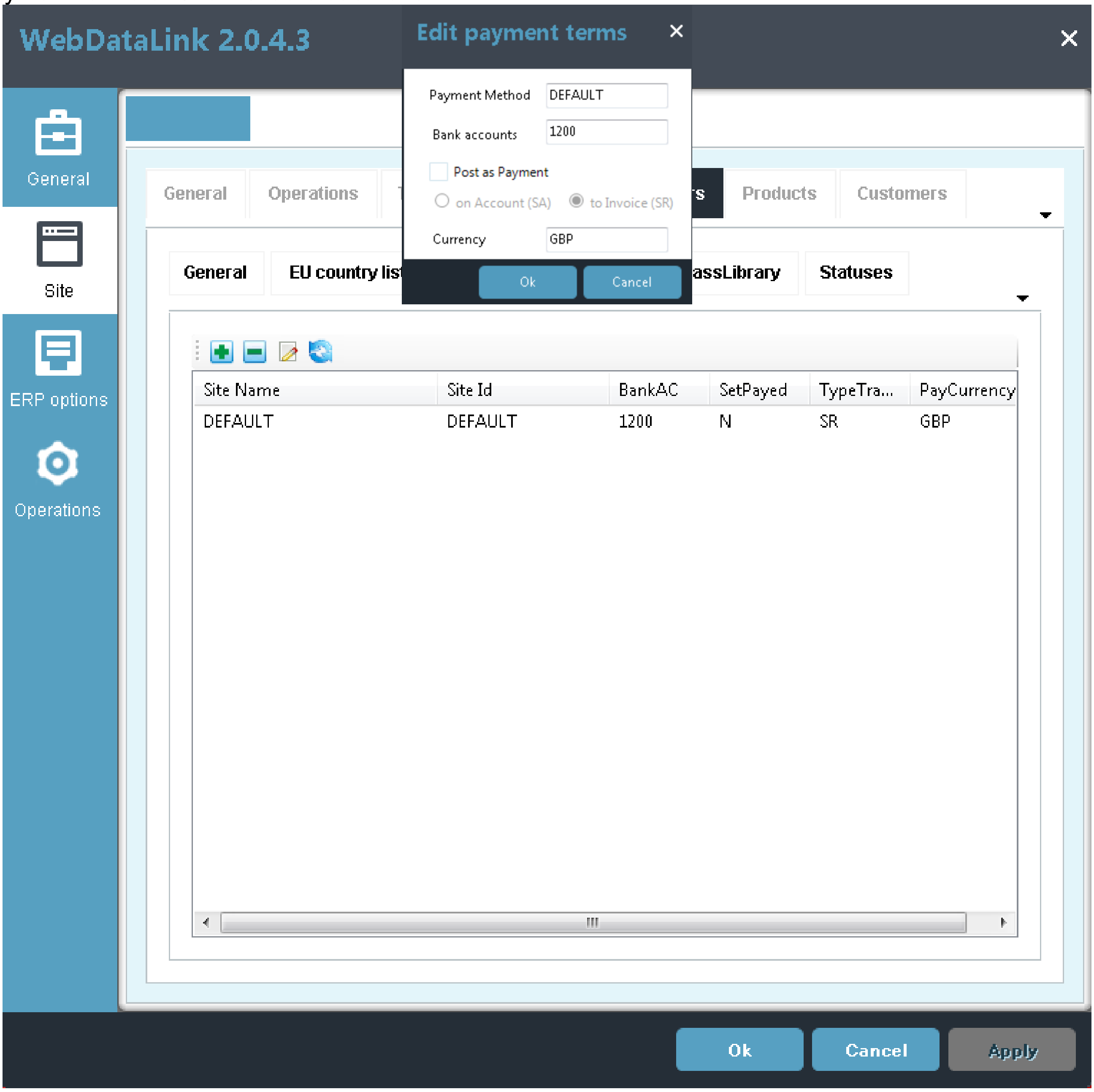
‘Sale type for download’ – allows to select sales order type/status for ‘Sales orders download from webiste’ feature. If nothing is selected, DataLink downloads ‘Orders’.
‘Use Bundle Policy’ – is used to configure downloading process for sales orders with bundle products.

2) EU country list tab of Site->Orders submenu



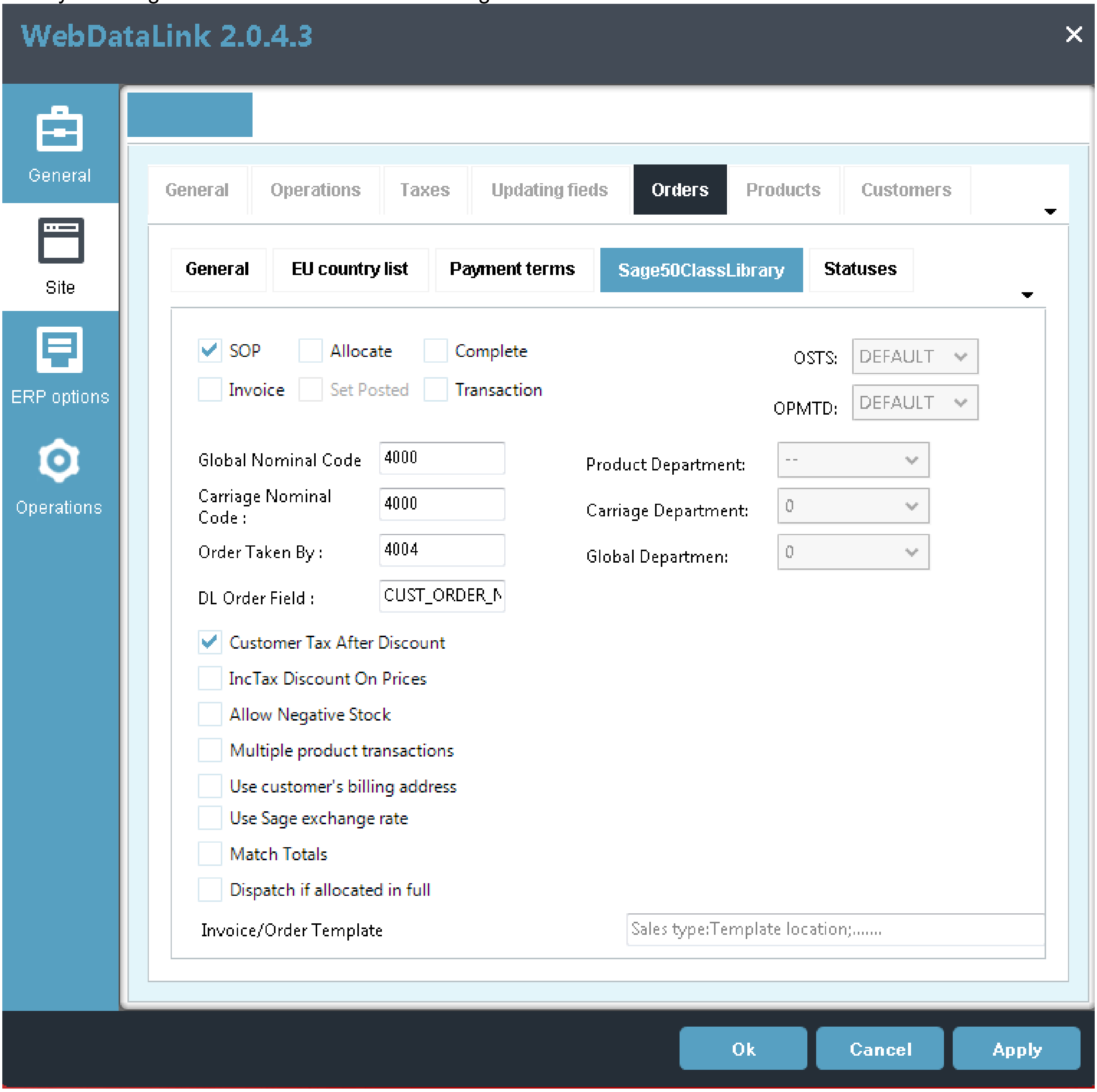
This tab contains country codes, we do not recommend changing default settings.

3) Payment terms of Site->Orders submenu



Here you can add and edit Payment methods for Sage 50. To edit any payment method, double click on required method and in popup window you will see available settings. This should be configured only if DataLink will create transactions (you would also need to enable this option in Sage50ClassLibrary submenu). Enter required bank account and tick Post as Payment checkbox, then select transaction type. Currency can be changed if needed.

4) Sage50ClassLibrary of Site->Orders submenu
Here you configure DataLink interaction with Sage 50.



Such elements as ‘SOP, Allocate, Complete, Invoice, SetPosted, Transaction’ are used for more flexible work with Sage 50, when sales orders are being downloaded to Sage 50 they can be created as one option or as combinations:

Invoice – only invoice is created

SOP+Allocate – creates sales order and allocates available stock.

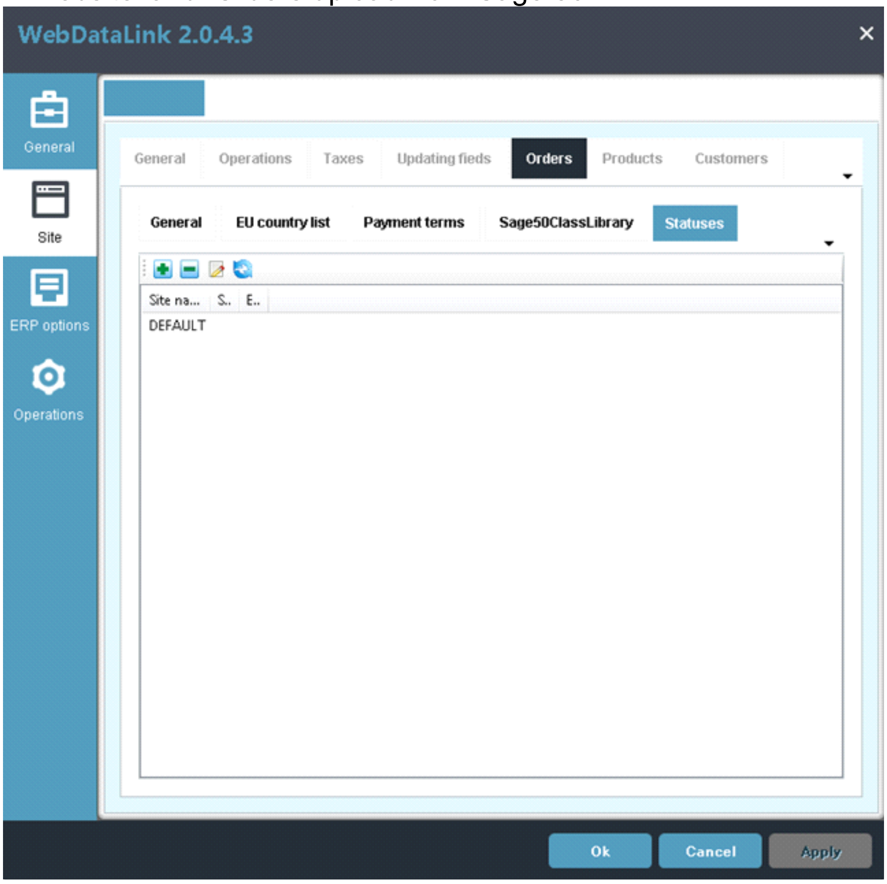
SOP+Complete+Invoice – creates an orders, amends stock levels and raises an invoice.

‘SOP+Complete+Invoice+SetPosted’ - creates an orders, amends stock levels and raises an invoice, creates payment transaction.

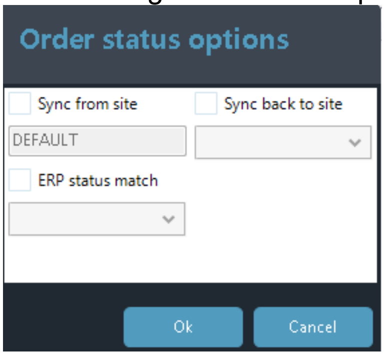
‘Invoice + SetPosted’ – only invoice and payment transaction are created.

‘Transaction’ – only transaction is created.
‘Global Nominal Code’ – is used to set Global Nominal Code value.
‘Carriage Nominal Code’ - is used to set Carriage Nominal Code value.
‘Order Taken By’- is used to set Taken By value.
‘DL Order Field’ – allows to reconfigure field where website order number is stored in Sage 50. ‘Customer order number’ field is set as default, we do not recommend to change it.
‘Product Department’ ,‘Carriage Department’ ,‘Global Department’ - fields where you can set required values for these configurations.
‘Customer Tax After Discount’ - enables the option to apply taxes after discount is calculated.
‘IncTax Discount On Prices’ – taxes are applied before discount is calculated.
‘Allow Negative Stock’ – tick the checkbox if negative stock is allowed (this option should be also activated in Sage 50).
‘Multiple product transactions ‘ – allows to creates separate SI transaction for each product in the sales orders.
‘Use customer's billing address ‘ - is used to upload customer billing address info to the website (available for ‘Order upload to website’ feature only).
‘Use Sage exchange rate’ – allows to select whether Sage 50 currency should be set as default – tick checkbox if yes.
‘Match Totals’ – recalculate total price of the order according to Sage 50 rules.
‘Dispatch if allocated in full’ – creates an invoice if order is fully allocated.
‘Invoice/Order Template’ – when order/invoice template is used, you can specify the route to the template in this field.

5) Statuses of Site->Orders submenu
Is used to manage configuration for order statuses. Here you can set preferences for both DataLink features ‘Orders download from website’ and ‘Orders upload from Sage 50’.

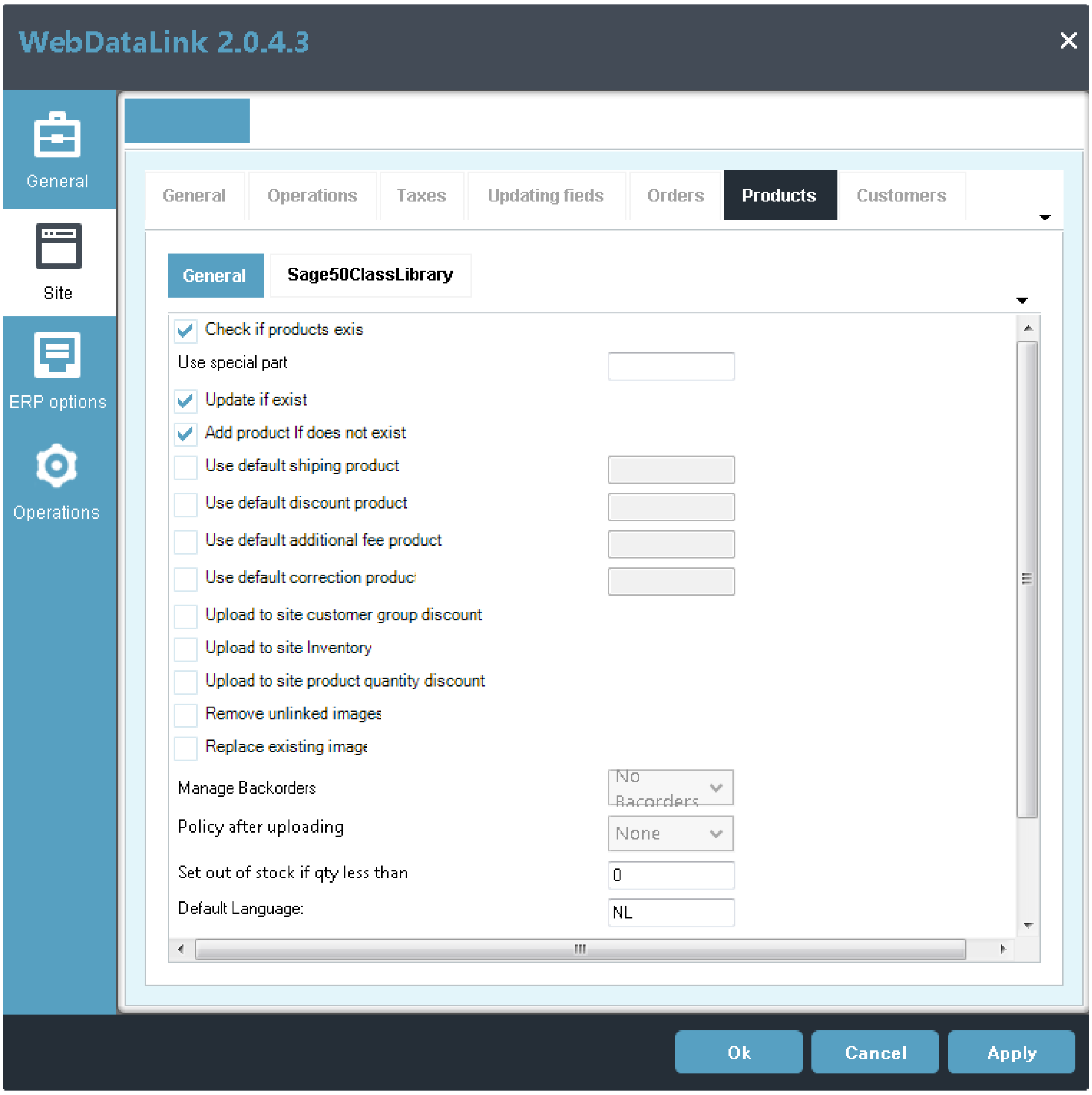


To specify certain status for sales orders download process, double-click on the status name (it will be "DEFAULT' as on the example below) and set configurations in the popup window.



For 'Download orders from website' select 'Sync from site' and write required status name in the text field. Please note status name should be exactly the same as you have on the website (e.g. 'complete', 'processing', etc.).
'ERP status match' – if you have 'Order status update' feature in your DataLink version, this option allows to set relevant order status in Sage50.
'Sync back to site' – changes order status after download process.

2.2.6 Products

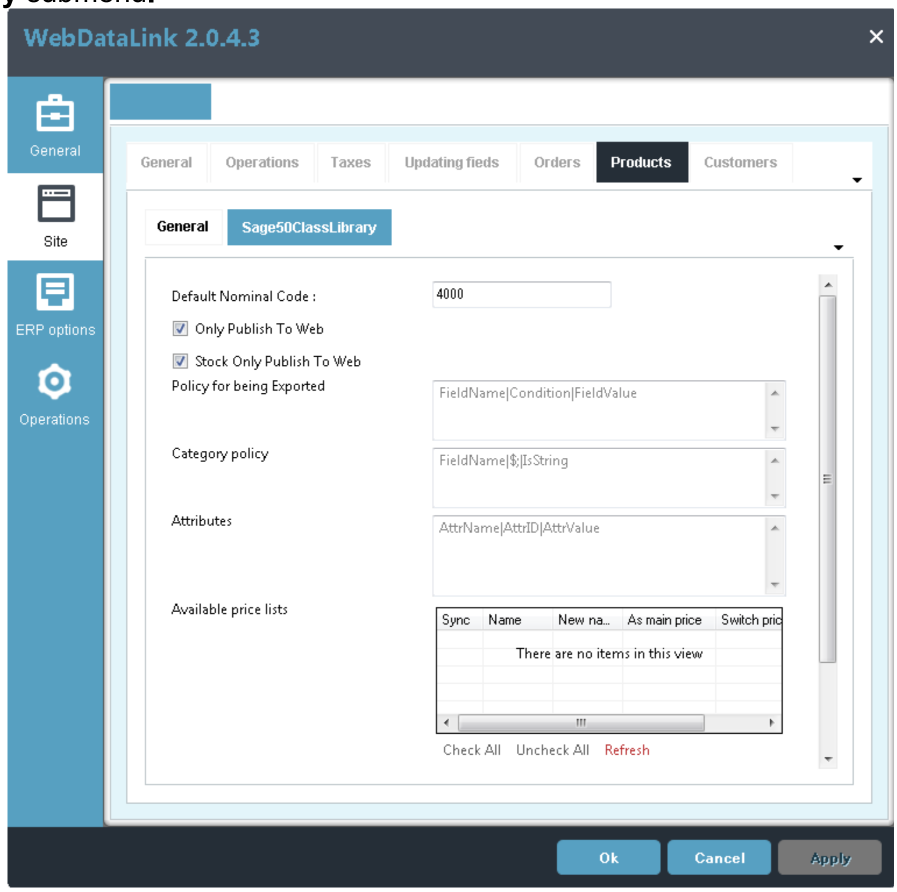


The following option can be configured in **General** submenu:

'Check if products exist' – Check if product exists in Sage 50 (should be enabled).
'Add product If does not exist' - Create new product if it doesn't exist in Sage 50.
'Use default shipping product' - is not applicable for Sage 50 connector.
'Use default discount product' - is not applicable for Sage 50 connector.
'Use default additional fee product' - is not applicable for Sage 50 connector.
'Use default correction product' - is not applicable for Sage 50 connector.
'Upload to site customer group discount' - Refresh price lists to the website (available with 'Products upload to website' feature only).
'Upload to site Inventory' - is not applicable for Sage 50 connector.
«Upload to site product quantity discount» - Use quantity discount configurations from Sage 50 (available with 'Products upload to website' feature only).
'Remove unlinked images' – delete images not linked to the product in Sage 50 (available for 'Products upload to website' feature only).
'Replace existing image' - Replace website images with images linked to the product in Sage 50 (available with 'Products upload to website' feature only).
'Manage Backorders' - allows to select one of the options for Backorder products in Magento 2.
'Use policy for getting additional product sku from title' - is not applicable for Sage 50 connector.
'Policy after uploading' – available options for the products that DataLink did not process on the website.

'Set out of stock if qty less than' – special rule for stock control, if quantity in Sage is less then amount set in this field, the product is shown as out of stock on the website.
'Default Language' - is not applicable for Sage 50 connector.
'Default Top Category ID' - is not applicable for Sage 50 connector.
'Store codes for updating categories' - is not applicable for Sage 50 connector.

Sage50ClassLibrary submenu.

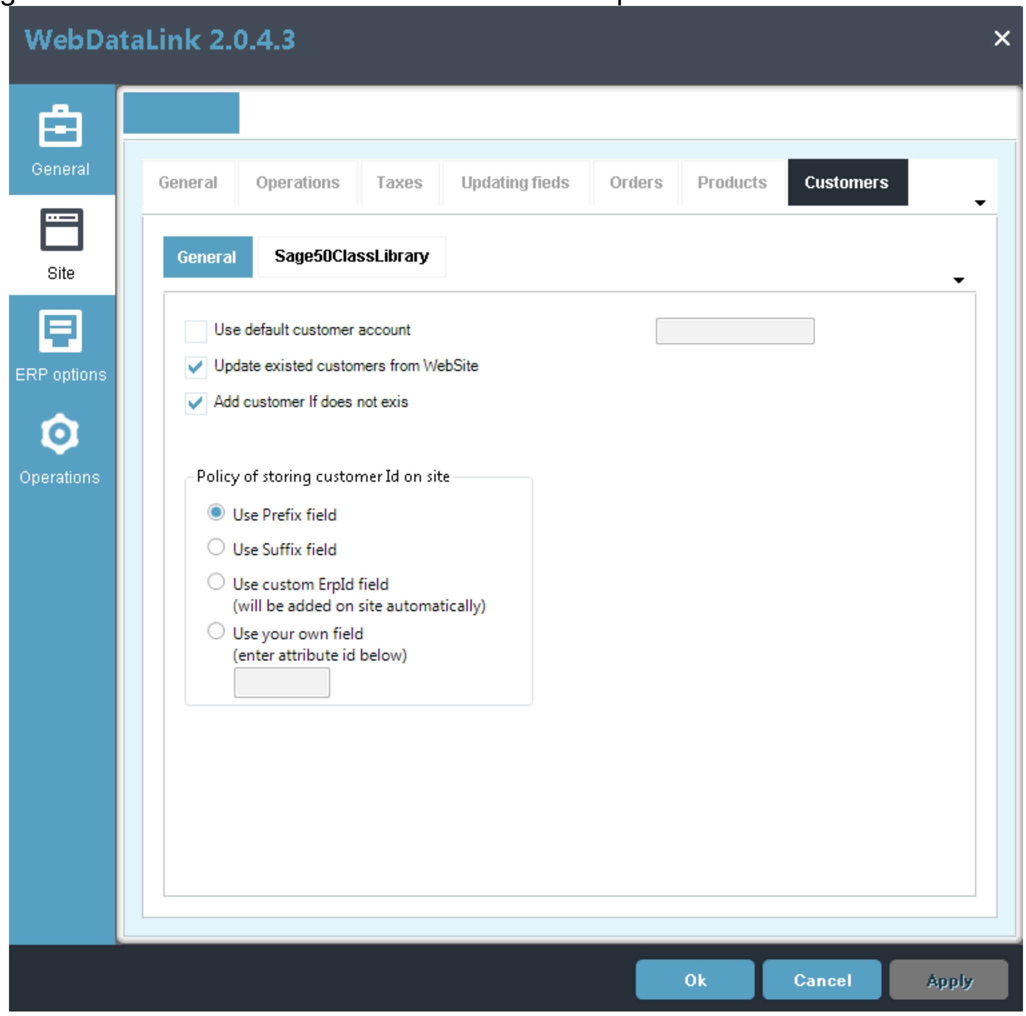


'Default Nominal Code' – set Default Nominal Code for products.
'Only Publish To Web' – when active, DataLink will import only products with ticked 'Publish To Web' checkbox in Sage 50 (available with 'Products upload to website' feature only).
'Stock Only Publish To Web' – when active, stock will be updated only for products with ticked 'Publish To Web' checkbox in Sage 50 (available with 'Stock update to website' feature only).

'Policy for being Exported' – shouldn't be configured by the end client, is used during development/configuration process by DataLink specialist.
'Category policy' - shouldn't be configured by the end client, is used during development/configuration process by DataLink specialist.
'Attributes' - shouldn't be configured by the end client, is used during development/configuration process by DataLink specialist.
'Available price lists' – manage price lists configurations, to use Sage 50 prefferences press 'Refresh'.
'Additional Images Path' – setting up directory for additional images.
'Image pattern' – template for searching up images.

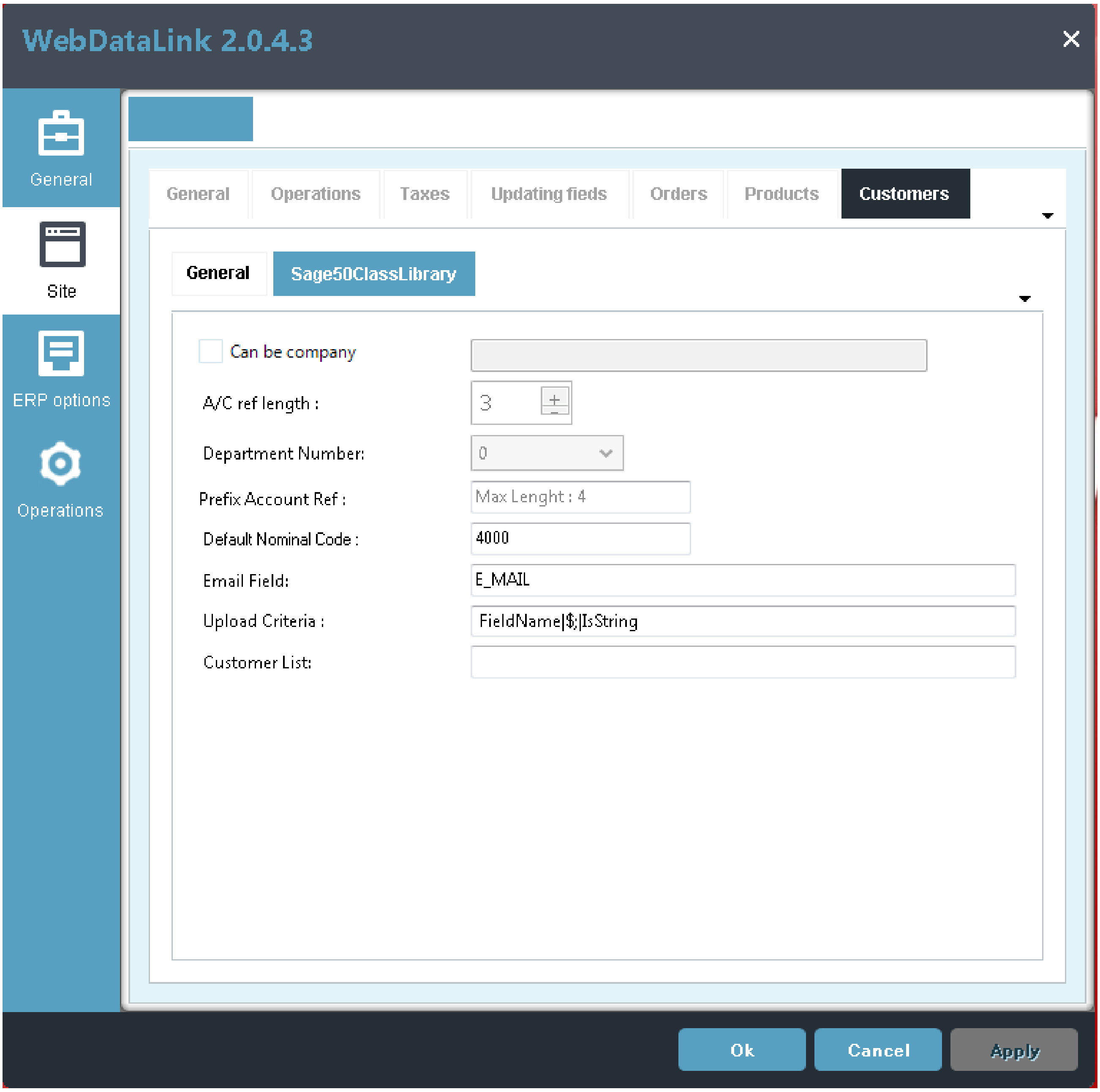
2.2.7 Customers

General submenu.
'Use default customer account' – use one account record for all sales orders downloaded via Datalink.
'Update existed customers from WebSite' – allows to switch on/off update of customer info that already exists in Sage 50.
'Add customer if does not exist' – allows to switch on/off an option to add new customer record if it doesn't exist in Sage 50.
'Policy of storing customer Id on site' – is used for 'Customer upload to the website' feature to store Sage ID.



Sage50ClassLibrary submenu.

'Can be company' – an option to search customers using email domain name as customer record for one company, text field is used to enter domain names that should be ignored (e.g. gmail.com, yahoo.com, etc.).
'A/C ref length' – is used to specify the number of characters of A/C ref for new customer in Sage 50.
'Department number' - setting up Department number for new customers.
'Prefix Account Ref' – allows to set prefix for Account Ref.
'Default Nominal Code' - allows to set Default Nominal for new customers.
'Email Field' – default settings, we do not recommend to change.
'Upload Criteria' – is used to create a rule for 'Customers upload to website' feature.
'Customer List' – allows to upload only selected customers from the list (A/C Ref).

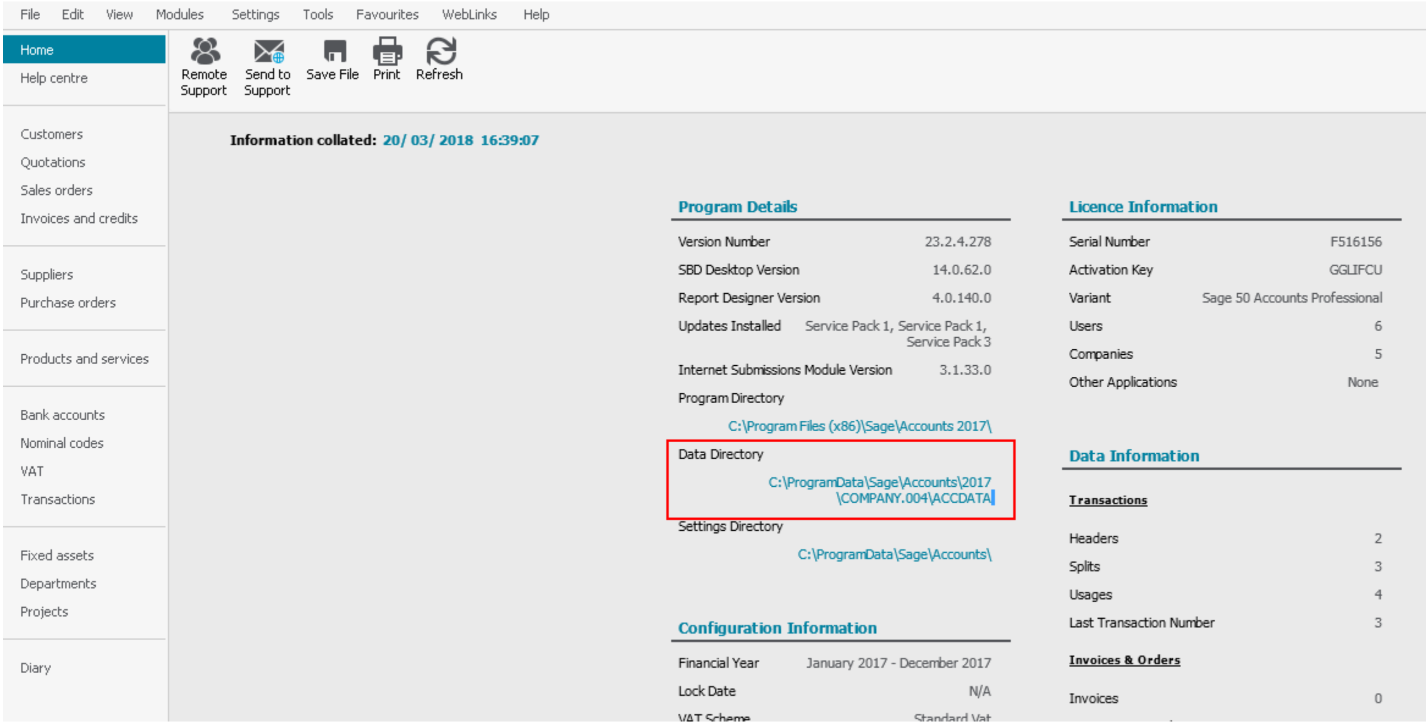


2.3 ERP options

2.3.1 Connection

This tab serves for setting up connection to your ERP (Sage 50) software.

Firstly please specify directory for your Sage 50 company. Please open your Sage 50 license -> Help->About.



We will use Data Directory information, please copy this field and divide it into two parts as per example below.

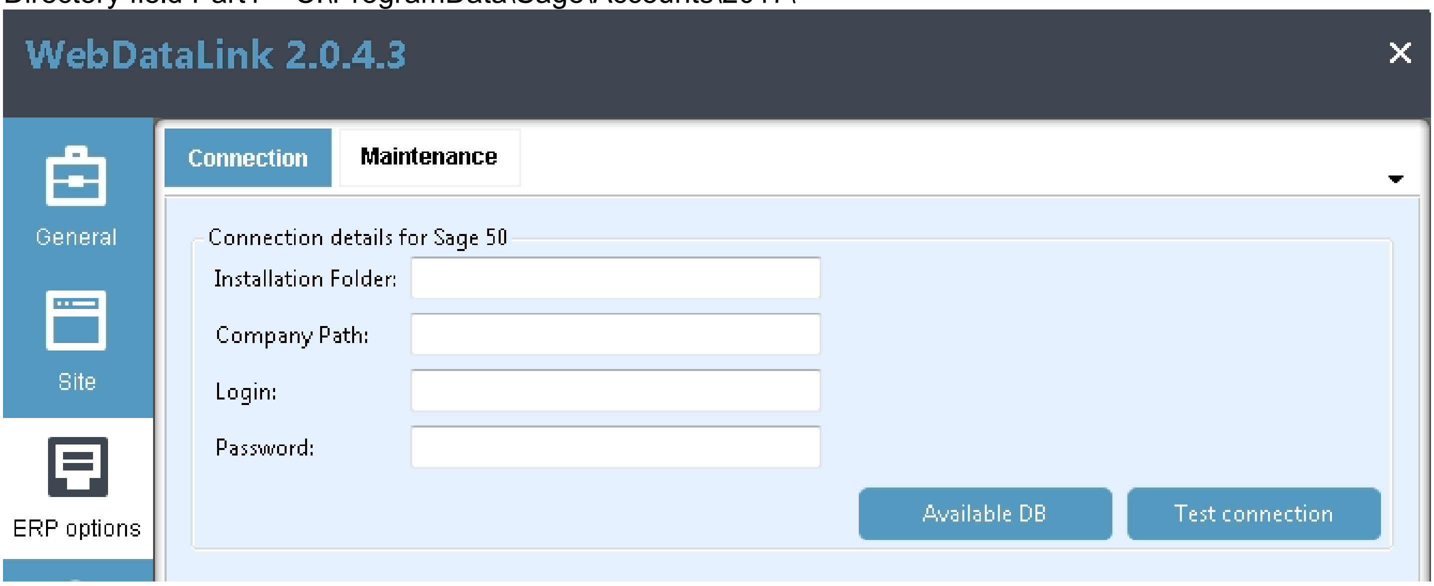
Example:

C:\ProgramData\Sage\Accounts\2017\COMPANY.004\ACCDATA

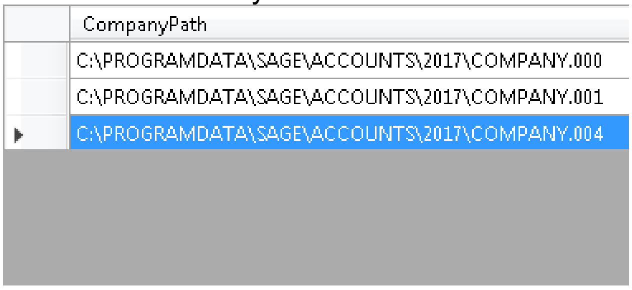
Two parts:

Part1. C:\ProgramData\Sage\Accounts\2017\
Part2. COMPANY.004\ACCDATA

Go back to your DataLink options tab -> ERP options. Into 'Installation Folder' past information from Data Directory field Part1 - 'C:\ProgramData\Sage\Accounts\2017\'



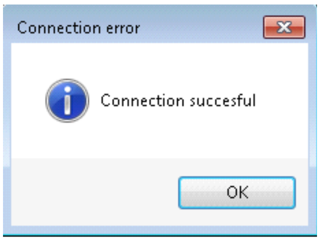
Company Path: 'Availble DB' button allows you to select required Sage company from dropdown menu. This information is specified into Part2 of Data Directory field.



Please enter user data you previously created for DataLink into 'Login' and 'Password' fields, in this case it is as follows:

Login: DataLink
Password: DataLink

Press 'Apply' button to save the settings and press 'Test Connection'. If all the settings are correct you will see the following popup window.



The popup window below means that we have successfully connected to Sage 50 database.

2.4 Operations

Here are displayed all available operations for your DataLink version.