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User Manual

Magento v2 DataLink for Sage 50



Version 1.0

12 April 2018

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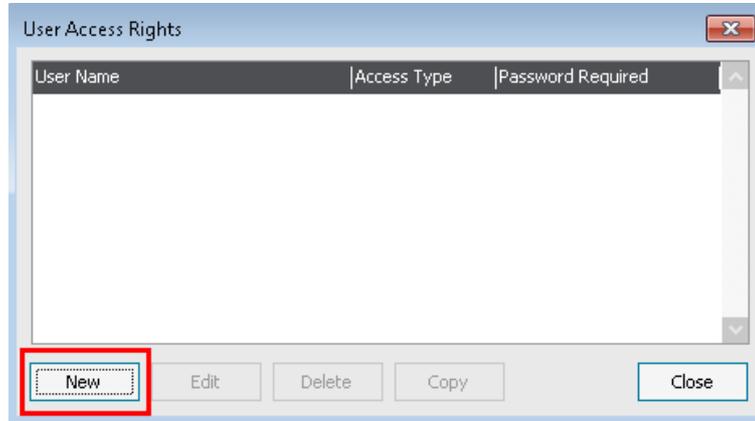
Settings and Configurations

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'.

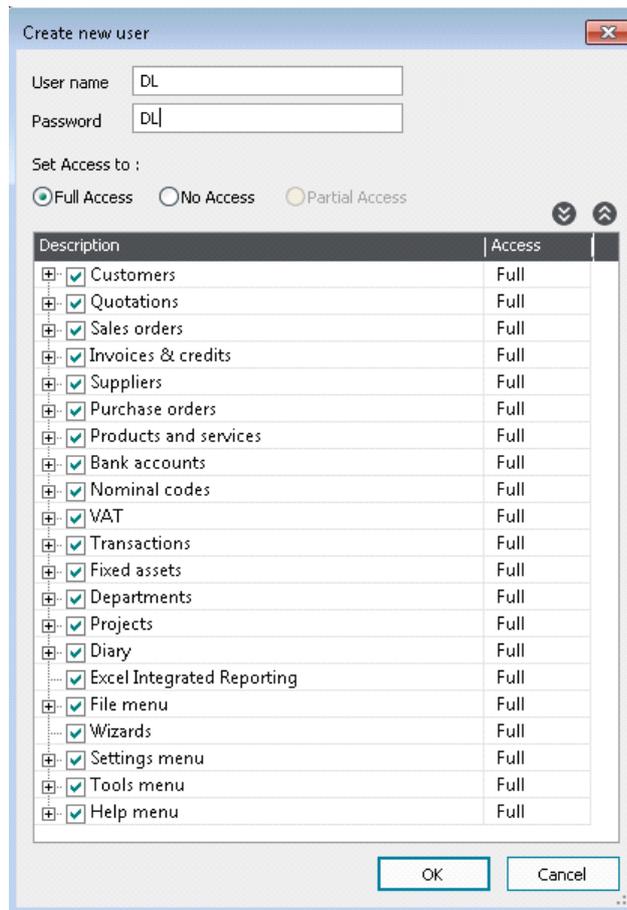


In 'Create new user' field type in :

User name : DataLink

Password : Datalink

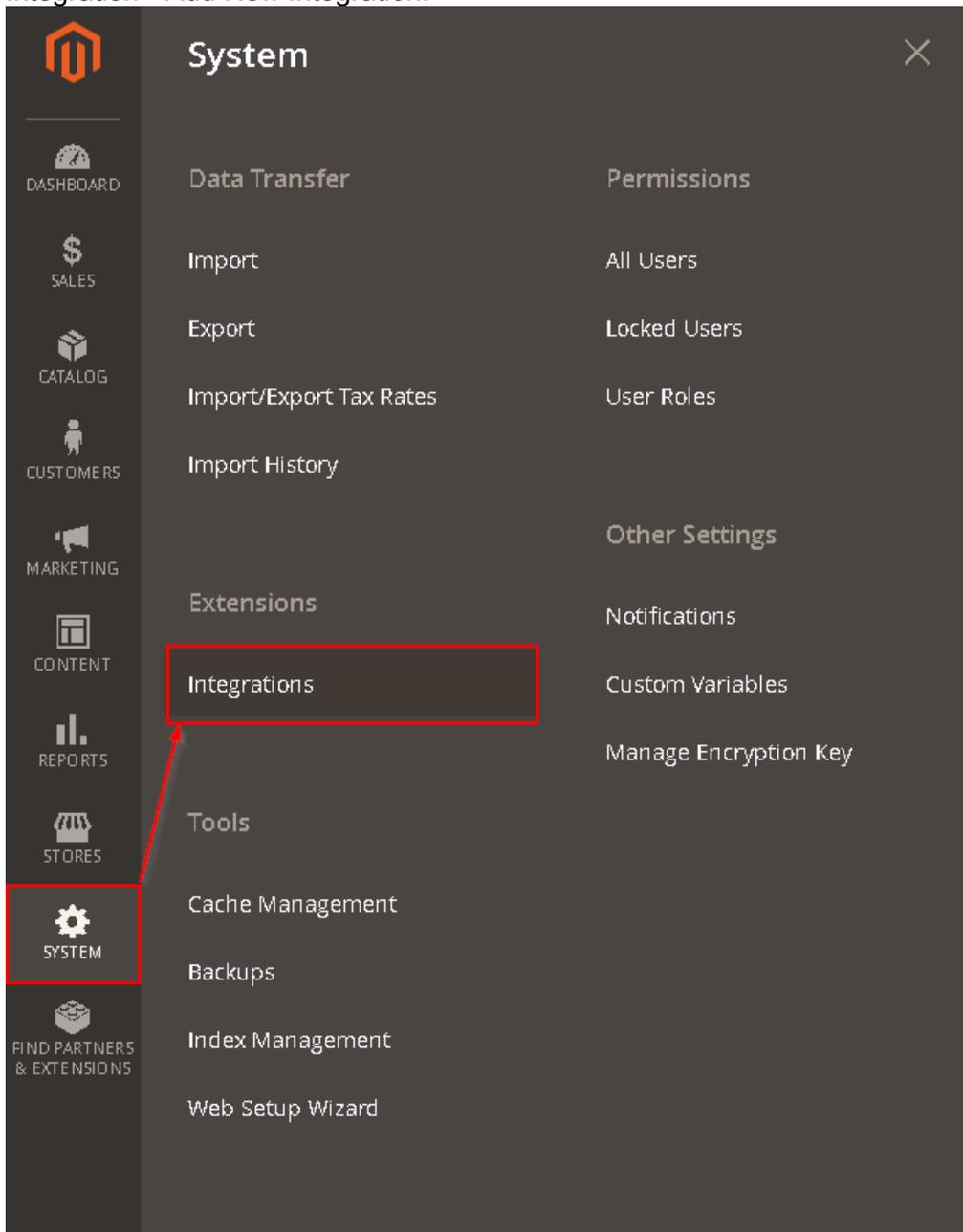
Set Access to : Full Access



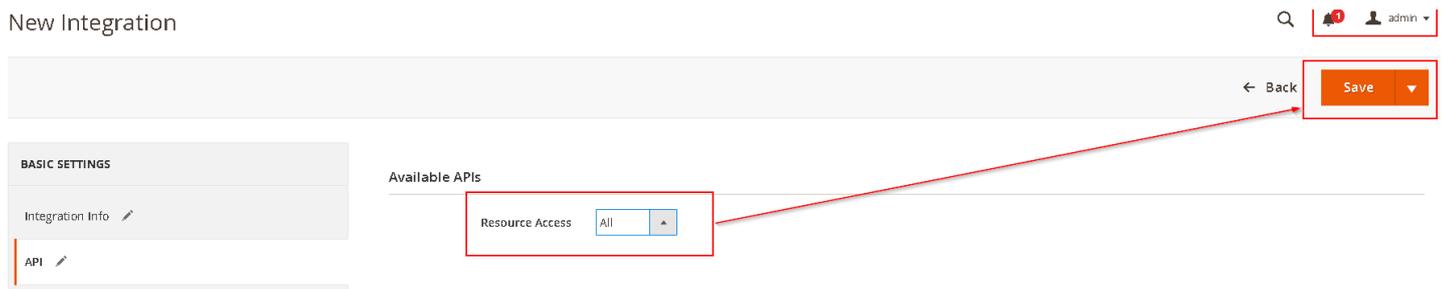
Press 'OK' button.

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'.

Integrations

Search 1 admin

[Add New Integration](#)

✓ The integration 'DataLink' has been saved.

Search [Reset Filter](#) 3 records found 20 per page 1 of 1

Name	Status			
Magento Social	Inactive	Activate		
Magento Analytics user	Active	Reauthorize		
DataLink	Inactive	Activate		

In the new popup window select 'Allow'.

DataLink ✕

[Allow](#)

The integration you selected asks you to approve access to the following:

- API
- Dashboard
- Analytics
 - API
- Sales
 - Operations
 - Orders
 - Actions
 - Create
 - View
 - Send Order Email
 - Reorder
 - Edit
 - Cancel
 - Accept or Deny Payment
 - Capture
 - Invoice
 - Credit Memos
 - Hold
 - Unhold
 - Ship
 - Comment
 - Send Sales Emails
 - Invoices
 - Shipments
 - Dispatches
 - Credit Memos

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

DataLink ✕

[Done](#)

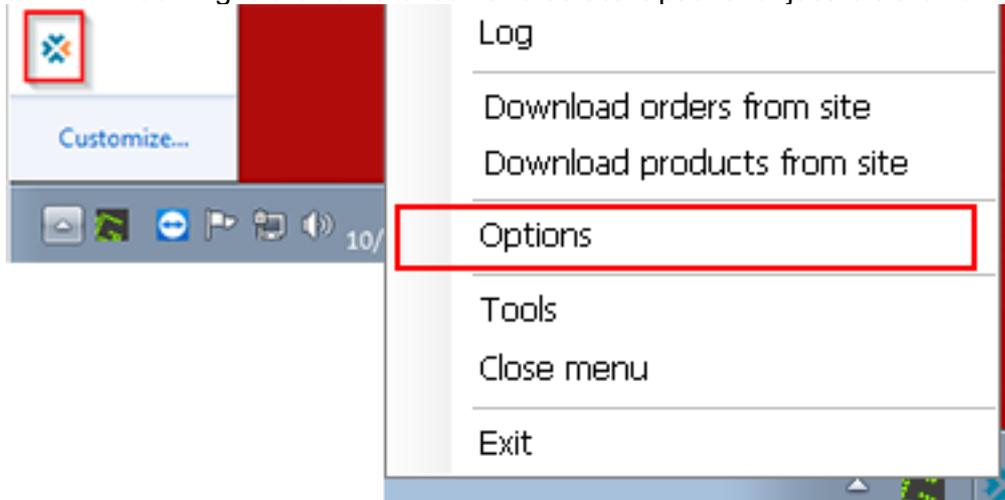
Integration Tokens for Extensions

Consumer Key	<input type="text" value="11111111111111111111111111111111"/>
Consumer Secret	<input type="text" value="22222222222222222222222222222222"/>
Access Token	<input type="text" value="33333333333333333333333333333333"/>
Access Token Secret	<input type="text" value="44444444444444444444444444444444"/>

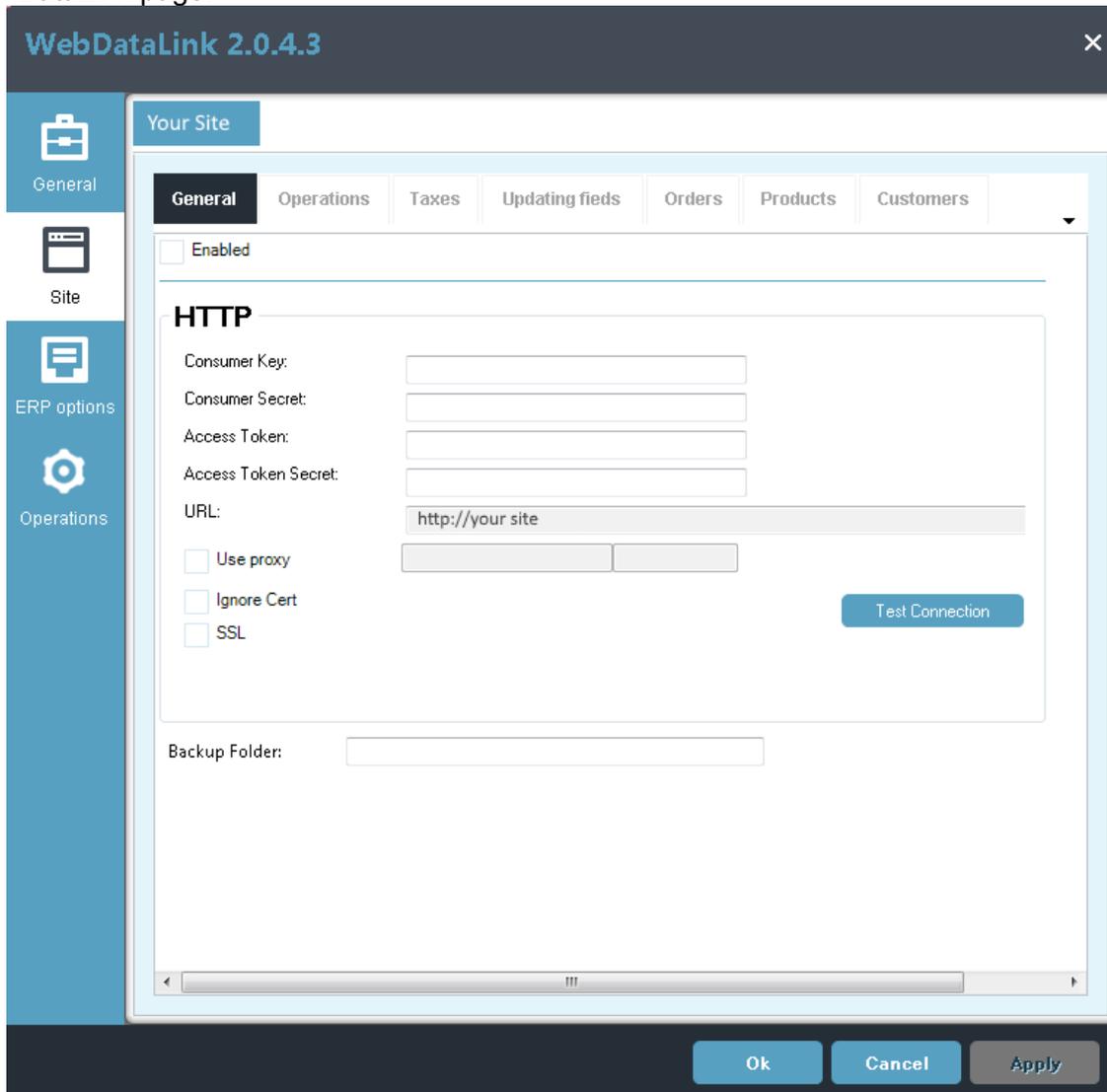
1.3 DataLink installation

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.

The screenshot shows the 'WebDataLink 2.0.4.3' application window. The 'Schedule' tab is selected, and the 'Orders from site' sub-tab is active. The configuration includes:

- Enabled
- Day selection: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
- Scheduling options:
 - Every Day at 21:00:00
 - Ongoing between 10:00:00 and 18:00:00 every 15 minute(s)

Buttons at the bottom: Ok, Cancel, Apply.

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

WebDataLink 2.0.4.3

Schedule | **Log Settings** | Additional

Notification center options

- Start operation balloon
- Finish operation balloon
- Start operation for site balloon
- Finish operation for site balloon
- Operation stopped balloon
- Add to log empty operation
- Enable all notification balloon:

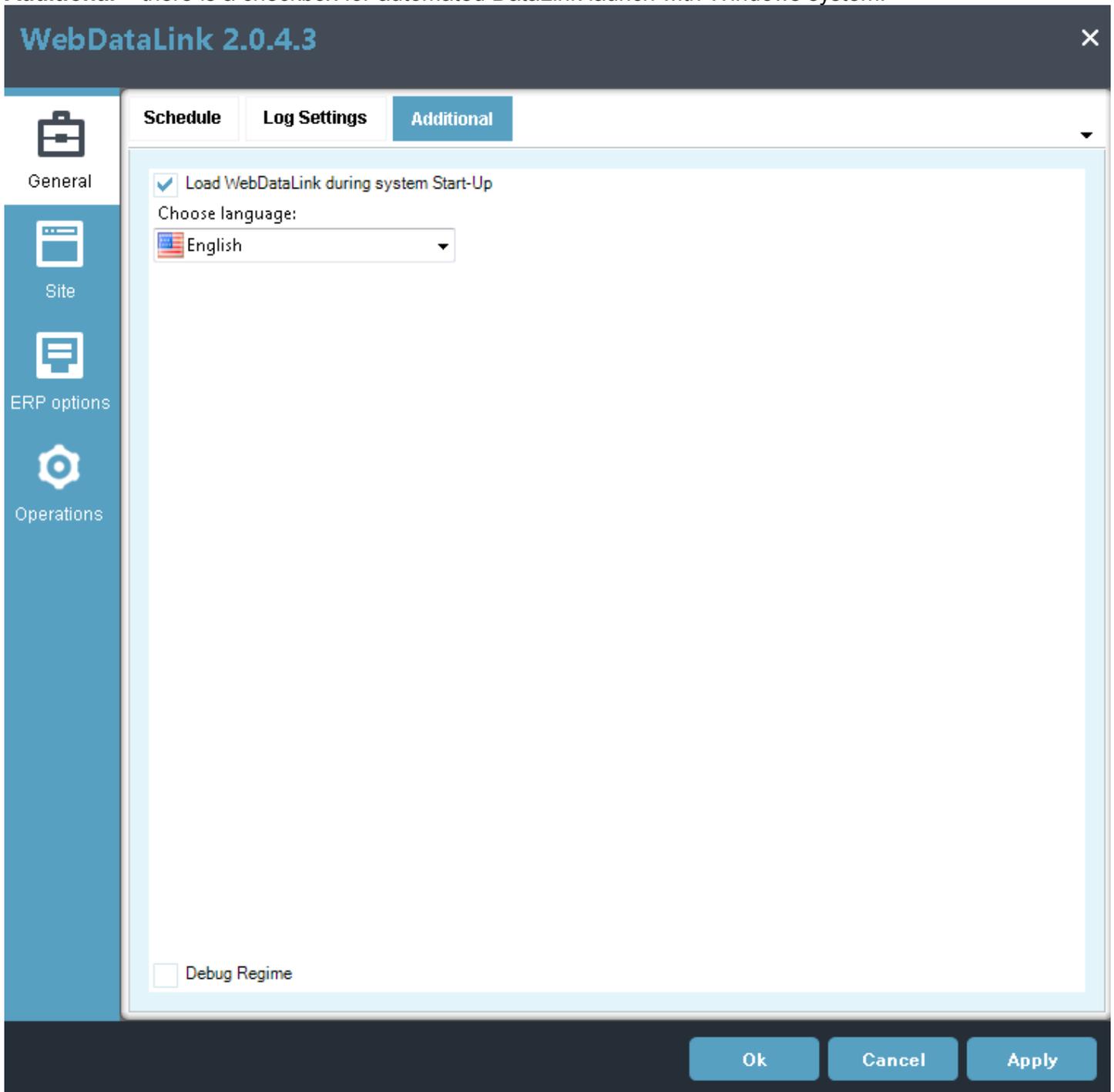
Maximum log file size: 500 Kb

Archeved logs folder: C:\Users\Public\Documents\WebDataLink_YOUCOMPANY\Log\

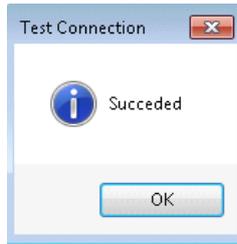
Displaying time a notification: 2 sec

Ok Cancel Apply

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



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

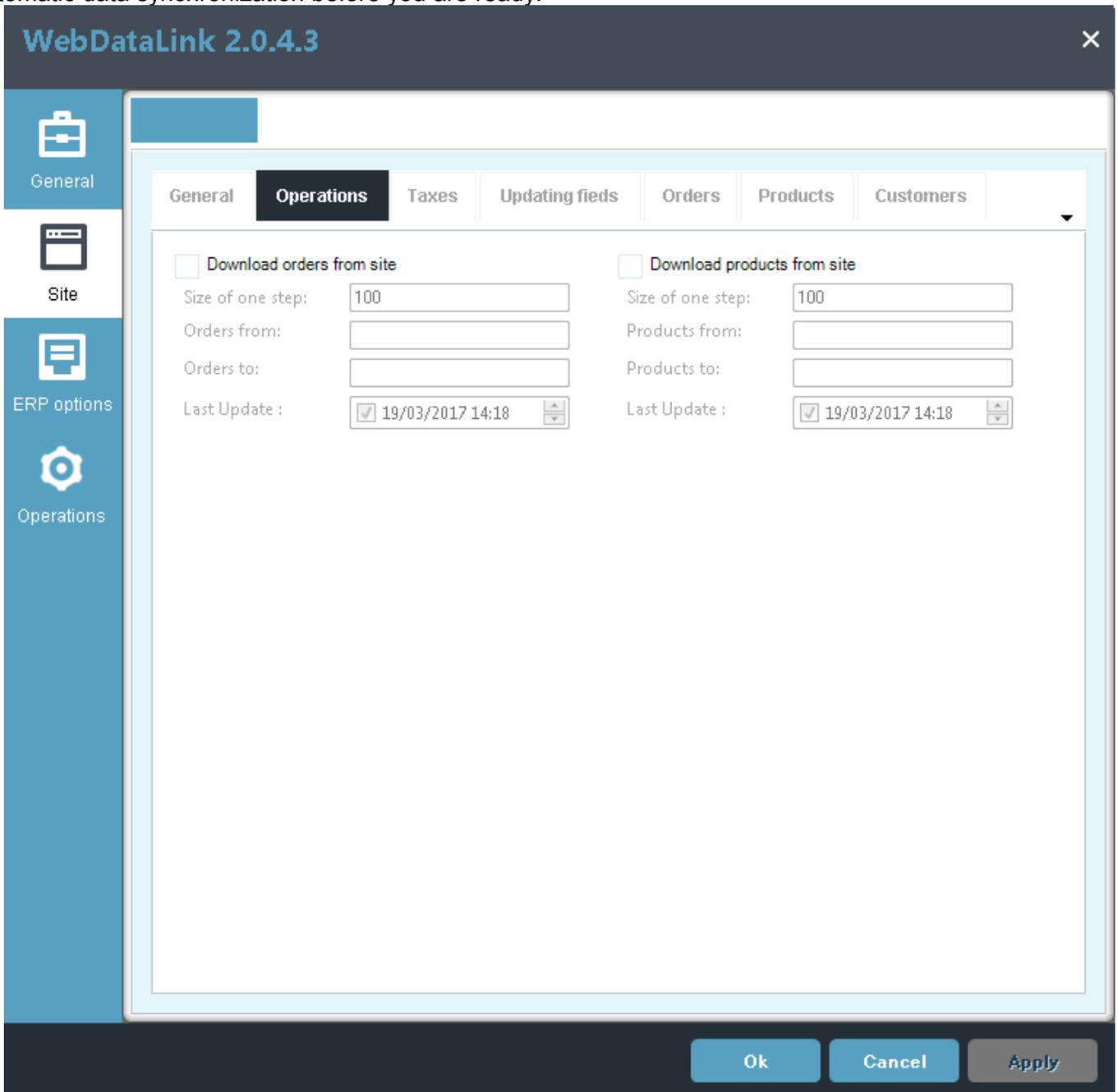


The following popup message means that you have successful connection to the website.

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

The screenshot displays the 'WebDataLink 2.0.4.3' application window. On the left is a vertical sidebar with icons and labels for 'General', 'Site', 'ERP options', and 'Operations'. The main content area features a horizontal tabbed interface with tabs for 'General', 'Operations', 'Taxes', 'Updating fields', 'Orders', 'Products', and 'Customers'. The 'Taxes' tab is active, showing a table with the following headers: 'T.', 'ERP code', 'Site co...', 'Site's customer t...', 'Rate(...)', 'Def Tax Co...', and 'Def Zero Tax Code'. The table body is currently empty. Below the table are two buttons: 'Refresh taxes from ERP' and 'Refresh taxes from Site'. At the bottom right of the window are three buttons: 'Ok', 'Cancel', and 'Apply'.

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'.

WebDataLink 2.0.4.3
✕


 General


 Site


 ERP options


 Operations

General

Operations

Taxes

Updating fields

Orders

Products

Customers

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

Refresh taxes from ERP

Refresh taxes from Site

Ok

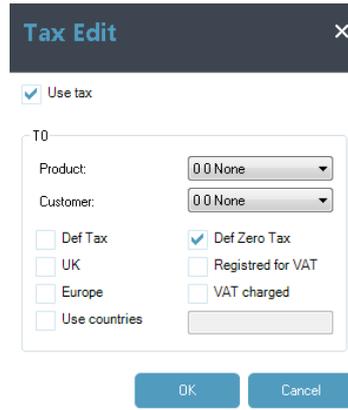
Cancel

Apply

Please note, while data is refreshing buttons are inactive.

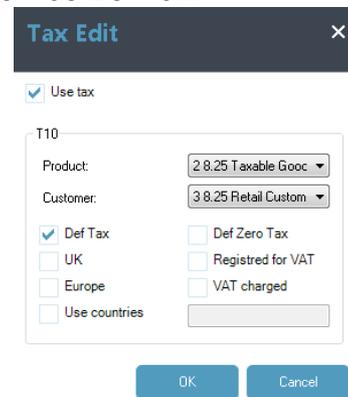
To link Sage 50 taxes with website taxes, double-click on the required tax line.

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

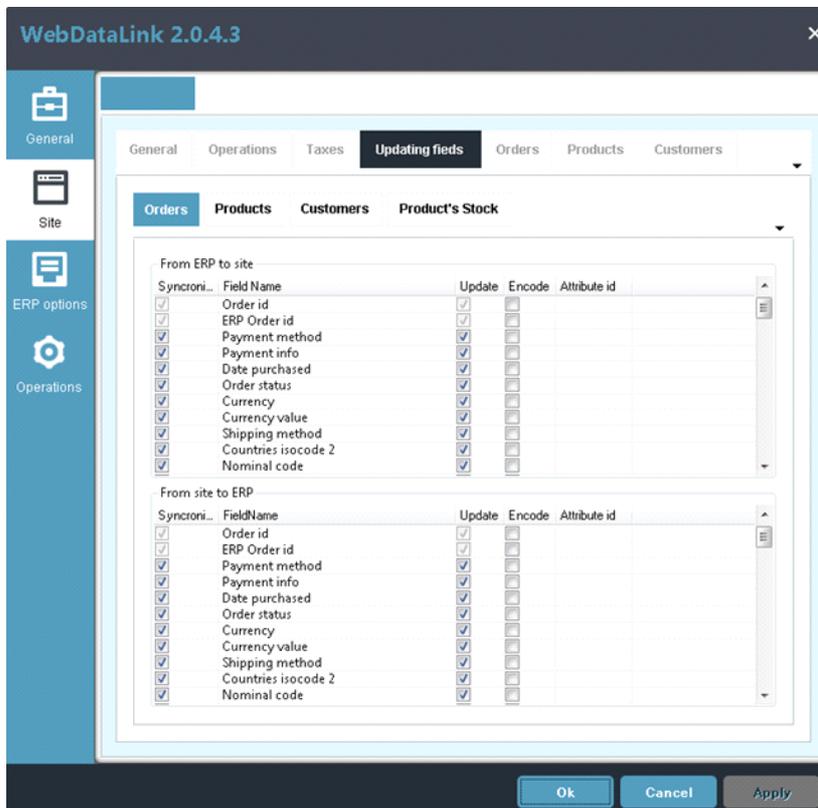


Tick 'Use tax' checkbox to enable tax settings configuration.

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'

WebDataLink 2.0.4.3

General | Operations | Taxes | Updating fields | **Orders** | Products | Customers

General | EU country list | Payment terms | Sage50ClassLibrary | Statuses

Check if order exists

Prefix for site order id:

Prefix for Ebay order id:

Don't process if customer doesn't exist product doesn't exist

Use Shipping name from site shipping info

Load customer's addresses info

Currency : Site/ERP

Use OP info

Digits after coma

Update existed oreders from WebSite

Main info Address info

Items info Add new items to existing

Erp sale type for export:

Sync	Type name	Id from	Id
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Invoice		

Ok Cancel Apply

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.

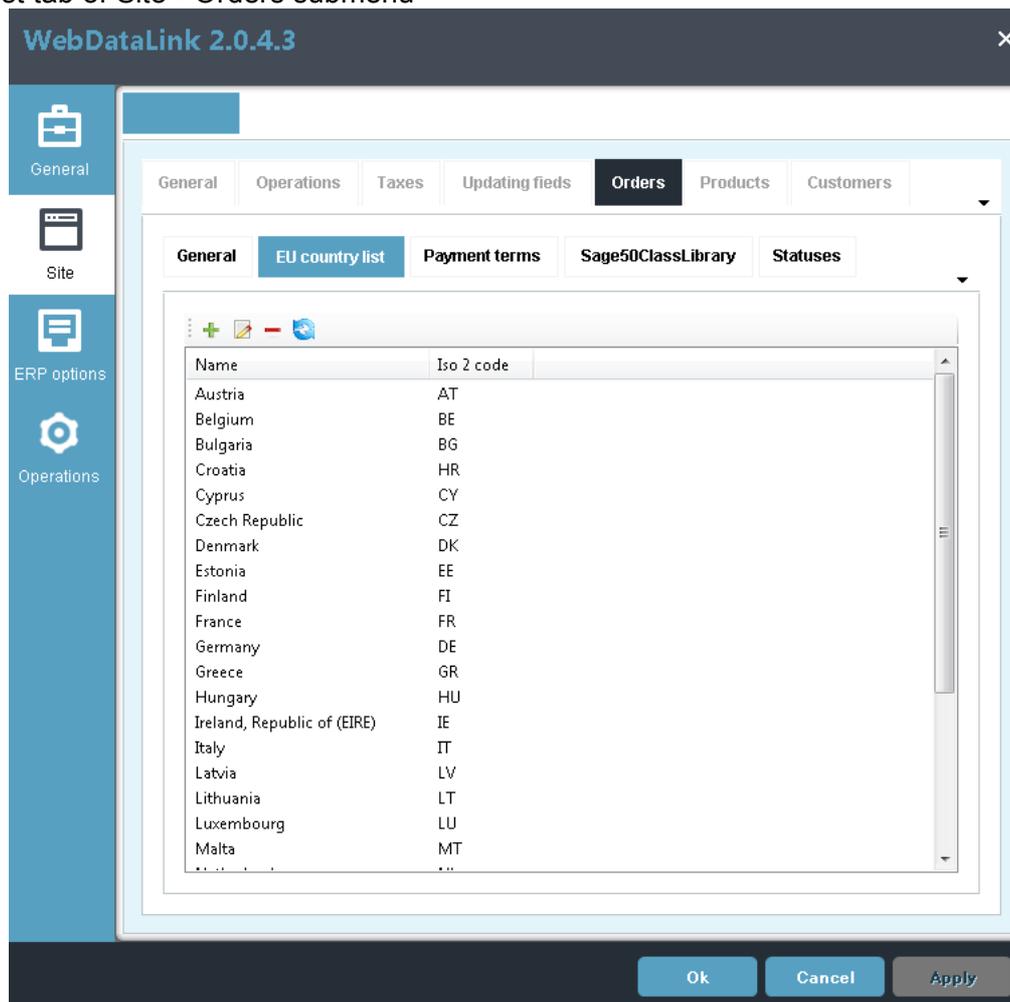
'Update existed orders from website' – allows to select several update options for existing Sage 50 orders.

'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 website' feature. If nothing is selected, DataLink downloads 'Orders'.

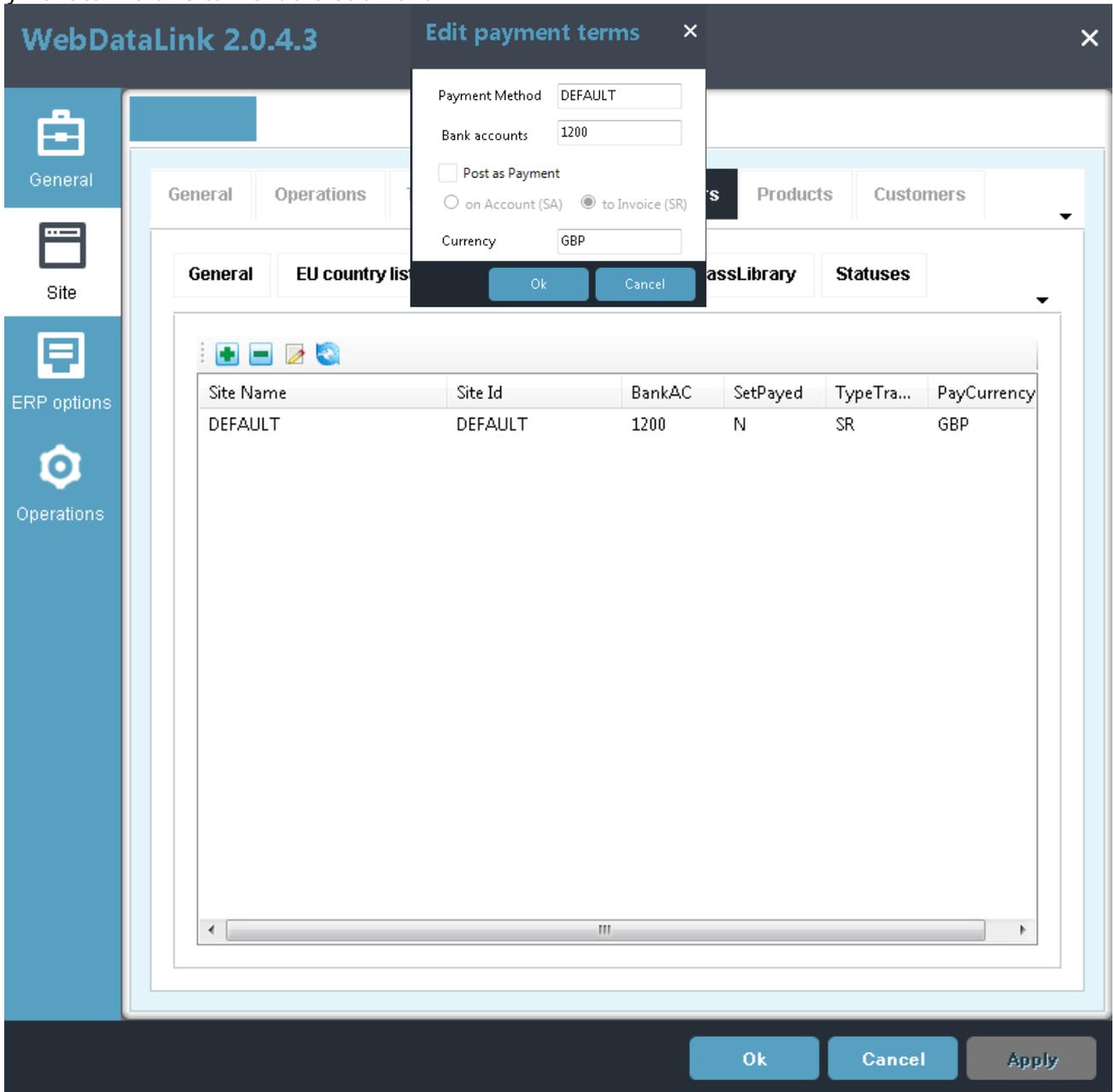
'Use Bundle Policy' – is used to configure downloading process for sales orders with bundle products.

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.

The screenshot shows the 'WebDataLink 2.0.4.3' application window. The left sidebar contains navigation icons for 'General', 'Site', 'ERP options', and 'Operations'. The main window has a tabbed interface with 'Orders' selected. Under 'Orders', the 'Sage50ClassLibrary' tab is active. The configuration options are as follows:

- SOP Allocate Complete
- Invoice Set Posted Transaction
- OSTS: DEFAULT (dropdown)
- OPMTD: DEFAULT (dropdown)
- Global Nominal Code: 4000
- Carriage Nominal Code: 4000
- Order Taken By: 4004
- DL Order Field: CUST_ORDER_M
- Product Department: -- (dropdown)
- Carriage Department: 0 (dropdown)
- Global Department: 0 (dropdown)
- Customer Tax After Discount
- IncTax Discount On Prices
- Allow Negative Stock
- Multiple product transactions
- Use customer's billing address
- Use Sage exchange rate
- Match Totals
- Dispatch if allocated in full
- Invoice/Order Template: Sales type:Template location;.....

At the bottom right, there are three buttons: 'Ok', 'Cancel', and 'Apply'.

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.

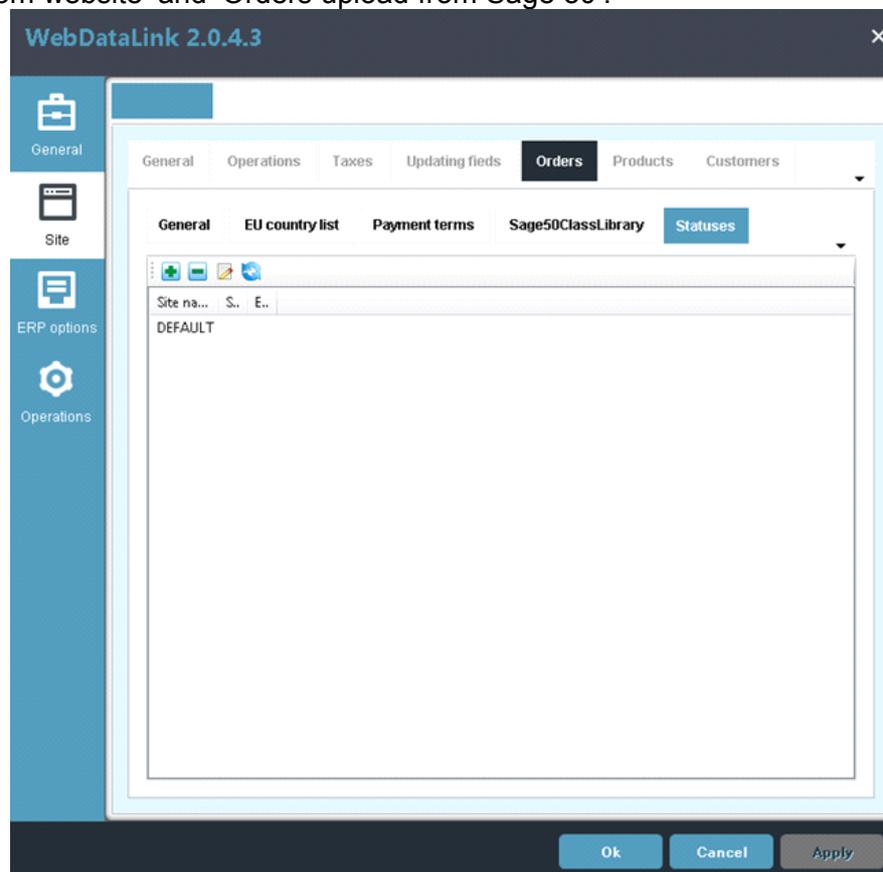
'Match Totals' – recalculate total price of the order according to Sage 50 rules.

'Dispatch if allocated in full' – creates an invoice if order is fully allocated.

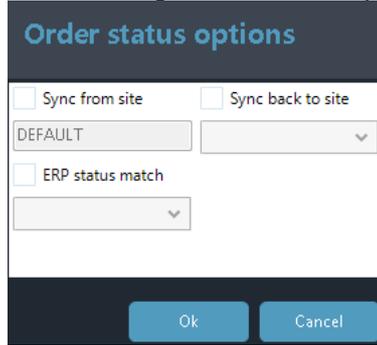
'Invoice/Order Template' – when order/invoice template is used, you can specify the route to the template in this field.

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.

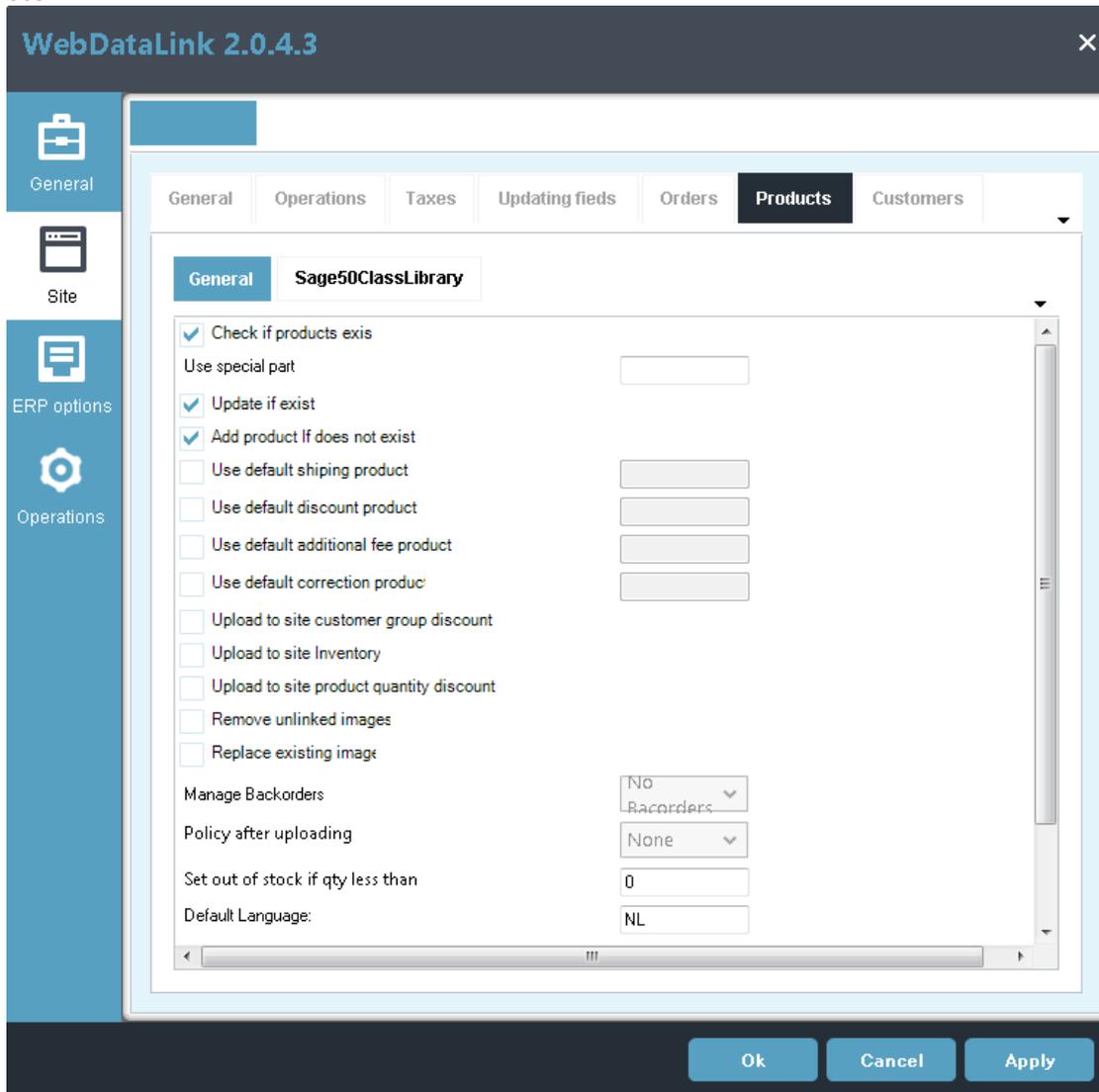


For ‘Download orders from website’ select ‘Sync from site’ and write required status name in the text field. Please note status name should be exactly the same as you have on the website (e.g. ‘complete’, ‘processing’, etc.).

‘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.

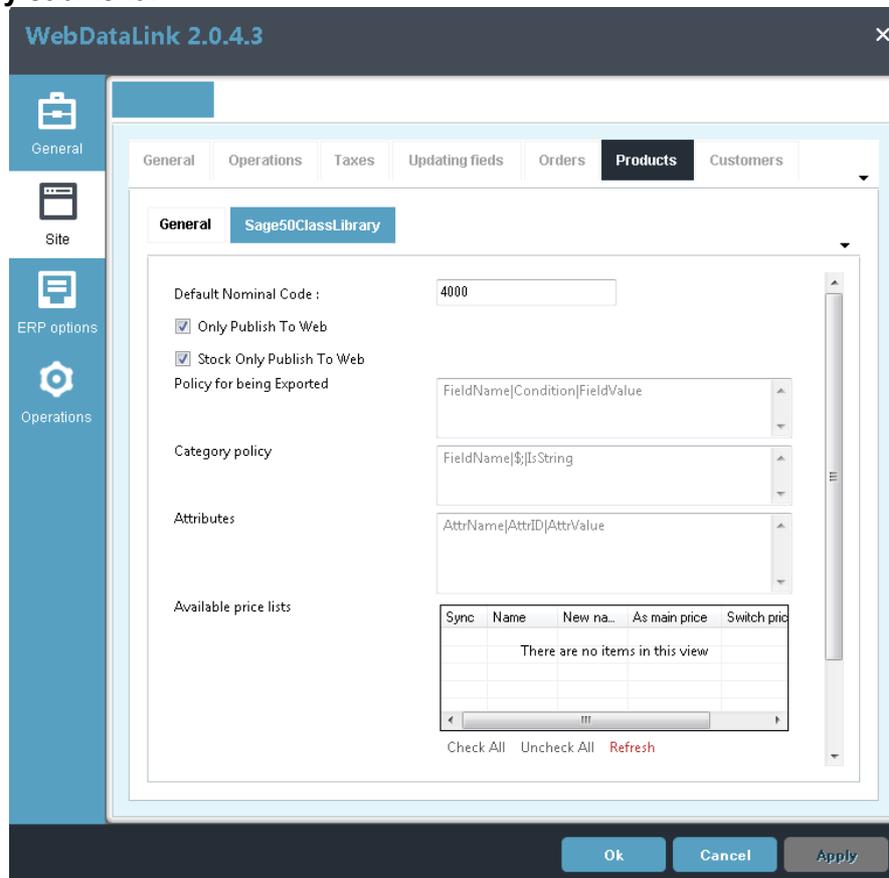
2.2.6 Products



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 preferences 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.

WebDataLink 2.0.4.3

General | Operations | Taxes | Updating fields | Orders | Products | **Customers**

General | Sage50ClassLibrary

Use default customer account

Update existed customers from WebSite

Add customer If does not exist

Policy of storing customer Id on site

Use Prefix field

Use Suffix field

Use custom Erpld field
(will be added on site automatically)

Use your own field
(enter attribute id below)

Ok Cancel Apply

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).

WebDataLink 2.0.4.3

General | Operations | Taxes | Updating fields | Orders | Products | **Customers**

General | Sage50ClassLibrary

Can be company

A/C ref length : 3

Department Number: 0

Prefix Account Ref : Max Length : 4

Default Nominal Code : 4000

Email Field: E_MAIL

Upload Criteria : FileName|\$;|IsString

Customer List:

Ok Cancel Apply

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.

The screenshot shows the 'About' window in Sage 50. The 'Data Directory' field is highlighted with a red box, containing the path: `C:\ProgramData\Sage\Accounts\2017\COMPANY.004\ACCDATA\`. Other sections include Program Details, Licence Information, Data Information, and Configuration Information.

Program Details	
Version Number	23.2.4.278
SBD Desktop Version	14.0.62.0
Report Designer Version	4.0.140.0
Updates Installed	Service Pack 1, Service Pack 1, Service Pack 3
Internet Submissions Module Version	3.1.33.0
Program Directory	C:\Program Files (x86)\Sage\Accounts 2017\
Data Directory	C:\ProgramData\Sage\Accounts\2017\COMPANY.004\ACCDATA\
Settings Directory	C:\ProgramData\Sage\Accounts\

Licence Information	
Serial Number	F516156
Activation Key	GGLJFCU
Variant	Sage 50 Accounts Professional
Users	6
Companies	5
Other Applications	None

Data Information	
Transactions	
Headers	2
Splits	3
Usages	4
Last Transaction Number	3

Configuration Information	
Financial Year	January 2017 - December 2017
Lock Date	N/A
VAT Scheme	Standard Vat

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:

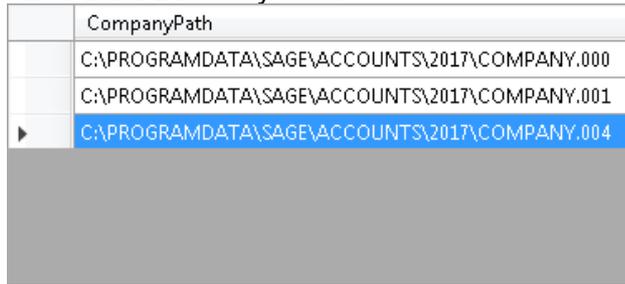
Part1. C:\ProgramData\Sage\Accounts\2017\

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\'

The screenshot shows the 'WebDataLink 2.0.4.3' application window. The 'Maintenance' tab is active, showing 'Connection details for Sage 50'. There are input fields for 'Installation Folder', 'Company Path', 'Login', and 'Password'. At the bottom right, there are two buttons: 'Available DB' and 'Test connection'.

Company Path: 'Available 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.

