



DSD Business Systems

Sage 100 Enhancements

SOSI

S/O Shipping Integration

Version 6.10



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S/O Shipping Integration User's Manual
Version 6.10

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to Sage 100. For instructions on using Sage 100, refer to the appropriate Sage 100 manual, or call your Sage 100 reseller. DSD Business Systems offers excellent Sage 100 support, at an hourly rate.

Web Resources

DSD web site: <http://www.dsdinc.com>

The Enhancement page contains:

- Current Release Schedule*
- Purchasing Information*
- Installation Instructions*
- Product Support*
- Enhancement Links*

SOSI S/O Shipping Integration:

<http://www.dsdinc.com/enhancement/sosi-shipping-integration>

The product web page contains:

- Product Description*
- Web Links*
- Current Product Version Table*
- Product Installation File Download*
- Product Manual in .pdf Format*
- Revision History*
- FAQ*

Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate. DSD's telephone number is **858-550-5900**. Fax: **858-550-4900**.

For a hard error, where the program displays an error dialog, report:

- Error number.*
- Program name.*
- Line number.*
- Program version.*
- Exact sequence that caused the error, including menus and menu selections.*

Other pertinent information.

If leaving a message or faxing, please include:

Your name.

Your phone number (and fax if applicable) and extension.

It is possible to be unable to duplicate a problem, because of data corruption or because we have not exactly duplicated a particular operating environment. In such circumstances, we can only continue to try to fix the problem if we can either access the system with Symantec PCAnywhere or by some other means access or duplicate the system.

S/O Shipping Integration Features

Shipping Integration is designed to integrate your shipping software system with your Sage 100 Sales Order shipping system. It requires that the shipping software be able to export a delimited file for each shipment. The delimited file can then be read by Shipping Integration and information pulled into Sage 100. Many shipping systems, like UPS Worldship or FedEx Shipping Manager, are able to read shipping information from SAGE 100 orders to speed entry. Setting these procedures up in the shipping software are outside the scope of this modification, but instructions for UPS Worldship and FedEx Shipping Manager have been included.

The key that ties everything together is the invoice number. For this reason, it is critical that each package shipped have the SAGE 100 invoice number, or SAGE 100 sales order number, or service order number in one of the Reference fields in the shipping software and that that reference field is set up to export after each shipment.

There are two sides to this process: the shipping software side and the Sage 100 side. There are no changes to the shipping software. As long as your shipping computer has access to the server where the SAGE 100 data resides and has ODBC installed, you can usually set it up to read data from the Sales Order header file directly into the shipment in the shipping software. As mentioned before, it is critical that the SAGE 100 order number be stored in one of the reference fields on the package so it can be exported with the shipment information and tied back to the SAGE 100 shipping system. Even though pulling information into the shipping software is a standard feature, an example will be documented briefly here.

The other side of the function is to pull the shipping software shipment information back into the SAGE 100 shipping system. This is the custom modification provided by the Shipping Integration installation. A standard feature of most modern shipping software, including UPS Worldship and FedEx Shipping Manager allows you to create a comma-delimited file with selected information after every shipment. This file is then read by the Shipping Import function to update the shipping records in SAGE 100. The order number must be present in the comma-delimited file. Along with that, the import can optionally update the tracking numbers, the weight, the freight and the Ship Via code from the shipping software to Sage 100. This new function is available as a batch process from the Sales Order shipping menu or from a button on the Sales Order Shipping Data Entry Shipment panel.

The Shipping Integration package does not only pull in UPS WorldShip or FedEx Shipping Manager data. As long as your shipping package can produce a comma-delimited file, you can import the designated shipping data from any other package as well.

Added Field Mapping – As of revision 01, you can map many additional fields to be filed in on the invoice header or in the tracking lines, including user-defined fields.

Shipping Integration Setup – As of revision 02, a separate menu option, Shipping Integration Setup, was added to the Sales Order Setup menu.

Purge Unmatched Shipments – As of revision 02, a separate menu option, Purge Unmatched Shipments, was added to the Sales Order Utilities menu.

Edit Shipping Records – As of revision 02, a separate menu option, Edit Shipping Records, was added to the Sales Order Utilities menu.

Service Order Matching – As of revision 02, you can specify the Service Order Number from Service Center in the import file and Shipping Integration will find the service order.

Section B: Getting Started



- **If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.**
- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.
- **Check with DSD before installing more than one Enhancement.**

Required Levels

Sage 100 Module	Module Required	Required Level
S/O	Y	6.10

Installation

1. **Back-up:** Exit all Sage 100 sessions. Back-up existing Sage 100 data.
2. **Check Levels:** Sage 100 module levels **must match** those listed above.
3. **Run Enhancement Setup Program:** Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.
4. **Send your Sage Serial Number to your DSD Representative:** Send your Sage Serial Number to your DSD representative in order for us to send you back the encrypted keys to unlock your system. This serial number can be found in Library Master\Setup\System Configuration, Tab 3. Registration as Serial Number.
5. **Re-Start Sage 100:** Sage 100 will be updated.
6. **Unlock the Enhancement:** DSD Enhancements must be unlocked to run. When any part of the Enhancement is run for the first time, the **DSD Enhancement License Agreement and Activation** window will appear. Follow the steps shown on that window. *You can click the Help button for more detailed instructions.*

Note: On the next page is a screenshot of the DSD Enhancement License Agreement and Activation window.

After accepting the License Agreement, you can then select the type of unlocking that you'd prefer. The choices are File, Web, Demo and Manual Entry.

File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from DSD and then proceed to unlock all enhancements contained in the file.

- The Sage 100 system that is being used must have web access for this option to be effective.
- You can send your Sage Serial Number to your DSD Enhancements sales representative.

Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

- Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.

Manual Entry Unlock: If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

Note: You can also unlock a DSD Enhancement through the **DSD Enhancement Control Panel** found on the Library Master Utilities Menu. Then, select the Enhancement with your mouse from the list of Enhancements and click the **Unlock Product** button on the right side of the window.

7. **Convert Data:** After unlocking, the DSD Conversion Wizard will appear. Follow on-screen instructions to complete data conversion. You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.

DSD Enhancement Control Panel

Starting with version 3.61, all DSD Enhancement products include DSD's Enhancement Control Panel. The **DSD Enhancement Control Panel is accessed from the Library Master Utilities menu.**

The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired task.

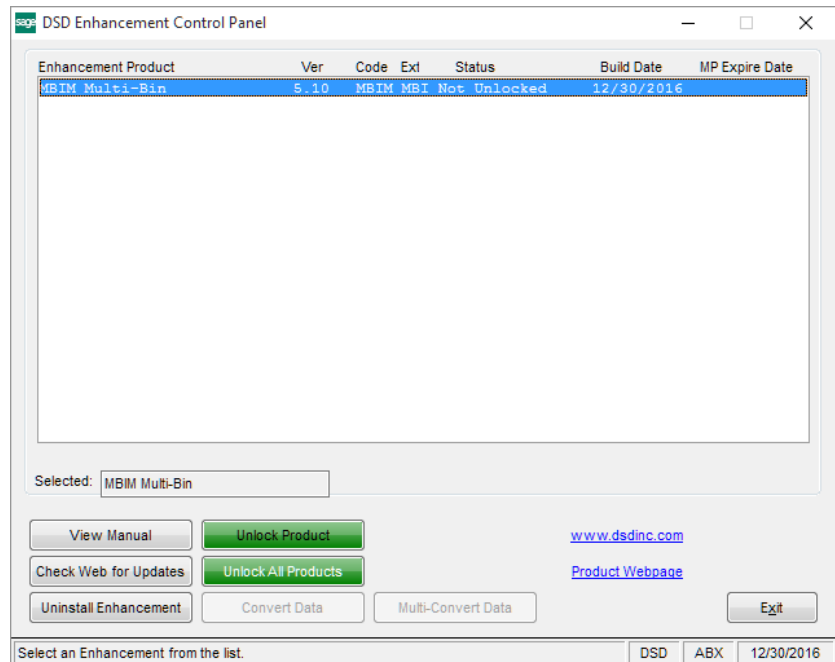
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

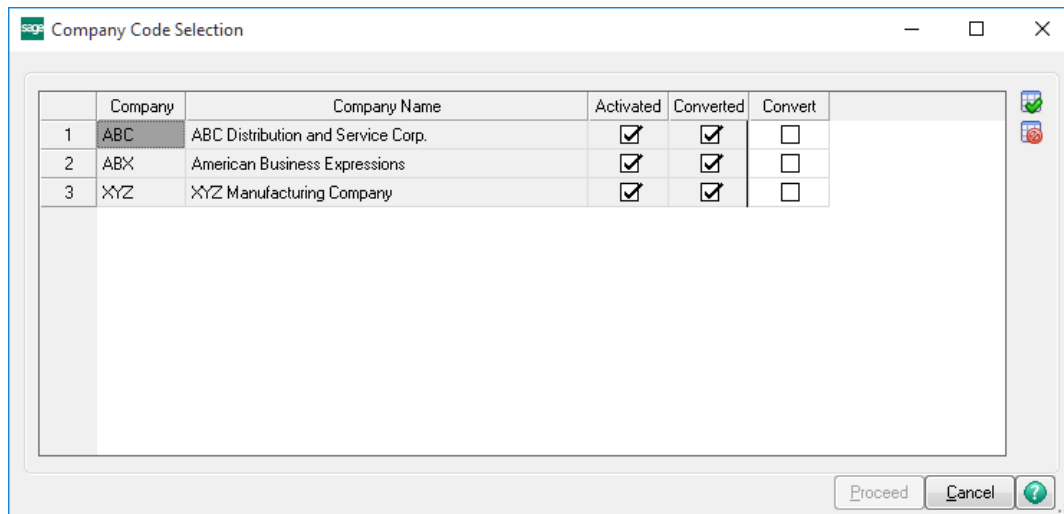
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

Unlock All Products: This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*

Convert Data: After verification, the selected Enhancement's data conversion program will run. Data conversion is non-destructive, and may be triggered any number of times. Sometimes this is required to fix data records imported or updated from a non-enhancement installation.



Multi-Convert Data: Multiple Companies can be converted at the same time for a given Enhancement. *(If you have a large number of Companies to convert, please do in batches of 20 or fewer due to memory limitations.)*



Help: The Help button, located at the bottom right of the window, opens an HTML help file.

Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system. (for more information see [Uninstall DSD Enhancements](#))

Section C: Setup

Export Requirements from Shipping

The Shipping Import feature described here requires that the shipping software create (or export) records with the data that is to be imported. The fields that the Shipping Import feature can use are described below. Later in this document is a description of how you tell SAGE 100 which fields to import and where to find them in the file that was sent from the shipping software. Included in this document is a brief overview of how you configure UPS WorldShip and FedEx Ship Manager to export a comma-delimited file with the appropriate data. The fields that can be imported do not have to be in any particular sequence in your shipping export file. Part of the configuration of the software will tell the program where to find each field.

Invoice Number – This field should match an existing order in the SAGE 100 Sales Order system. If this field is not available, or if the value in the field does not match a valid SAGE 100 invoice number, then the import function will look at the sales or service order number field and try to find the correct invoice number. If this field matches a valid SAGE 100 invoice number, then the sales and service order number fields will be ignored. In SAGE 100, the invoice number is seven characters long. If it is numeric, it is right justified and zero-filled. The invoice number in the comma-delimited file does not have to be properly formatted. The import function will attempt to format it according to the SAGE 100 requirements before matching to an invoice.

Sales Order Number – This field must match an existing order in the SAGE 100 Sales Order system. This field will be used only if the invoice number field is not available, or if the value in the invoice number field does not match a valid SAGE 100 invoice number. If this field is not available, then import function will look at the service order number field. If the value in the field does not match a valid SAGE 100 sales order that is currently being invoiced (or shipped), and the valid invoice number is not specified, then the record will not be imported. In SAGE 100, the order number is seven characters long. If it is numeric, it is right justified and zero-filled. The order number in the comma-delimited file does not have to be properly formatted. The import function will attempt to format it according to the SAGE 100 requirements before matching to a sales order.

Service Order Number – This field must match an existing order in the Service Center. This field will be used only if the invoice and sales order fields are not available. If this field is not available, or if the value in the field does not match a valid service order that is currently being invoiced (or shipped), and there are no valid invoice or sales order number, then the record will not be imported. The service order number is seven characters long. If it is numeric, it is right justified and zero-filled. The service order number in the comma-delimited file does not have to be properly formatted. The import function will attempt to format it according to the SAGE 100 requirements before matching to a service order.

Note: If none of the above fields are available, the import cannot work.

Tracking Number (Optional) - The tracking number, if provided, can be saved with the invoice in SAGE 100 and copied into history.

Weight (Optional) - Typical shipping software will include the weight of each package. You can select to save the weight along with the tracking number. You can also select to put the total weight on the order header.

Freight Amount (Optional) - You can select to put the freight amount for the package into the SAGE 100 order header. If there are multiple packages, the program will total the freight amount for the order header. If your sales order system is set up to calculate tax on the freight, that will automatically occur, also.

Ship Via (Optional) – You can select to automatically set the Ship Via field on the order header based upon the Ship Via from the shipping software. **NOTE:** This software will not translate the Ship Via values that are read from the shipping import file. Whatever is in the comma-delimited file must match a valid Ship Via code in SAGE 100 or it will be ignored.

Void Flag (Optional) – If you void a shipment in the shipping software, you must include the Void Flag (Y/N) in the shipping import file so that the tracking number can be removed from the invoice and the freight and weight can be recalculated.

Below is an example of a comma-delimited file from UPS WorldShip. Note that the fields are not in the same order as listed above. In the example, the fields are Service Order, Freight, Weight, Tracking, Ship Via, and Void Flag.

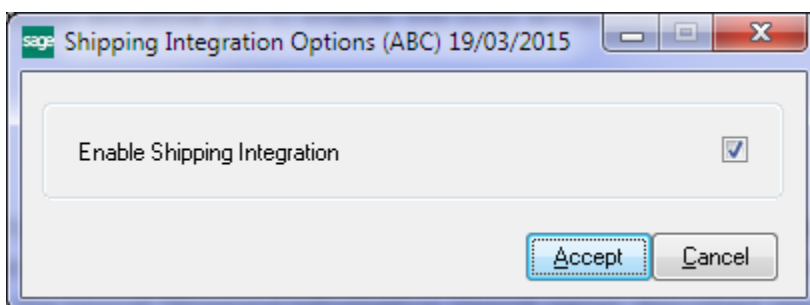
```
"0000171", "20.00", "8", "1ZWX01640163936185", "UPS BLUE", "N"
"0000171", "21.00", "9", "1ZWX01640163831798", "UPS BLUE", "N"
"0000171", "22.00", "10", "1ZWX01640163376209", "UPS RED", "Y"
"0000164", "23.00", "11", "1ZWX01640163930164", "UPS RED", "N"
"0000164", "24.00", "12", "1ZWX01640163830164", "UPS RED", "N"
"0000164", "25.00", "13", "1ZWX01640163370164", "UPS RED", "Y"
```

Other Fields – Options. Revision 02 of Shipping Integration allows you to export many fields from your shipping software and import them into most of the fields on the invoice header or in the invoice tracking lines.

Shipping Integration Setup

Two new options have been added to the SAGE 100 Sales Order Setup menu.

Shipping Integration Options will allow you to enable the SOSI enhancement for the particular company.



Shipping Integration Setup will allow you to define where to find the files to import and how to handle the data in those files. You can also get to the Shipping Integration Setup screen by clicking on the Setup button on the Import Shipping Information Import panel described later.

Shipping Import Settings (ABC) 11/11/2014

Import File Definition

Folder for Shipping Import: C:\ShippedFilesToImport

Import File Extension: CSV

Import File Delimiter: Comma ,

Import File Has Header: ☒

Field Mapping

Name	Import Field
Sales Order Number	2
Service Order Number	0
Invoice Number	1
Contract Number	0
TrackingID	3
Weight	4
Freight	5
Ship Via	9
Voided Flag	0

[Map Additional Fields](#)

Options

	Invoice	Contract
Update Tracking Numbers from Shipping	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Clear BLANK Tracking Before Import	<input type="checkbox"/>	<input type="checkbox"/>
Update ShipWeight (Totals Panel) from Shipping	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Update Weight from Shipping	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Update Freight Charge from Shipping	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Default Per Package Surcharge	\$0.00	\$0.00
Default Per Shipment Surcharge	\$0.00	\$0.00
Update Ship Via from Shipping	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Delete Files After Import: ☐

After Import Move Files to Folder: C:\ShippedFilesImported

Accept Cancel

Import File Definition

Folder for Shipping Import – Enter the full path name to the folder where the shipping import file can be found. This is the file that is created by the shipping software package after every shipment. The shipping software will put the comma-delimited files here whenever a shipment is complete, or at the end of day. This shipping import function will search this folder for all the files to import.

Import File Extension – Enter the extension that will identify the files to import. The typical extension use for comma-delimited files is CSV (comma-separated values). However, you can put any extension that will properly identify the files to be imported. The shipping import function will look for files in the specified folder that have this extension.

Import File Delimiter – By default the shipping import function expects to have comma-delimited data to read, but you can tell it to look for tab-delimited, tilde-delimited or pipe (|) delimited data instead.

Import File Has Header – Typically WorldShip will not put a header line in the file to be imported, but other shipping software might. If there is a header line in the file to be imported, check this box so that the import function will ignore the first line.

Field Mapping

In this section you tell the shipping import function where to find the fields it needs, and which fields to use. You must have an invoice, or sales order, or service order number in the import file, but the other fields are optional. However, the import file must include at least one of the fields Tracking ID, Weight, or Freight. If none of these fields are in the import file, then there is no reason to import.

Sales Order Number – Enter the field number in the import file that holds the sales order number. If the invoice field number is not zero, the import will try to use the invoice number first to match the shipping record. In our example file above, the sales order is in the second field, so we enter a '2' here.

Service Order Number – If you are running Service Center, the Service Order Number multi-line will be enabled. Enter the field number in the import file that holds the service order number. The import will use the service order number to match the shipping record only if the invoice and sales order field numbers are zeros.

Invoice Number – Enter the field number in the import file that holds the invoice number. You can use the invoice number, the sales order number or the service order number to match the shipping record, but if you provide all of them, the import will try to use the invoice number first. . In our example file above, the invoice is in the first field, so we enter a '1' here.

Contract Number – If the R/O module is integrated, the contract number field will be enabled. Enter the field number in the import file that holds the contract number.

Tracking ID – Enter the field number for the tracking ID. You can leave this blank if a tracking number is not being imported. In our example file above the tracking number was in the third field, so we enter a '3' here.

Update Tracking Numbers from Shipping – Check this box if you want the tracking numbers from the shipping software to be written to the SAGE 100 tracking file.

Weight – Enter the field number in the import file where the weight of the package is found. In our example, the weight was in the fourth field, so we enter a '4' here.

Update Weight from Shipping – Check this box if you want the weight from the shipping software to be updated to the header of the sales order invoice. The total weight of the shipment will display on the totals screen.

Freight – Enter the field number in the import file where the weight of the package is found. In our example file the weight was in the fifth field, so we enter a '5' here.

Update Freight Charge from Shipping – Check this box if you want to calculate and set the invoice freight amount based on the freight charges from the shipping software.

Ship Via – Enter the field number in the import file where the Ship Via can be found. The ship via code in the import file must match a valid ship via code in the SAGE 100 system or it will be ignored.

Update Ship Via from Shipping – Check this box if you want to put the ship via code from the shipping software into the ship via code on the invoice header.

Voided Flag – Enter the field number in the import file where the voided flag can be found. This is a Y or an N, depending on if this package shipment has been voided.

Map Additional Fields

This link will pop up the window shown below that allows you to map many additional fields on the invoice header or in the tracking record fields.

	Field Name	Import Field	Update If Blank
1	AcceptCashOnly		<input type="checkbox"/>
2	BatchEmail		<input type="checkbox"/>
3	BatchFax		<input type="checkbox"/>
4	BillToAddress1	6	<input type="checkbox"/>
5	BillToAddress2	7	<input type="checkbox"/>
6	BillToAddress3	8	<input type="checkbox"/>
7	BillToCity		<input type="checkbox"/>
8	BillToCountryCode		<input type="checkbox"/>

NOTE – If the same field, such as FreightAmt, is in the main screen and the Additional Fields, the Additional Field mapping will happen after the main screen field mapping and will therefore override the main screen field mapping.

Field Name – The Field Name column gives a list of the available fields in the sales order invoice header table and in the tracking table into which you may map import information. Note that the tracking file fields have the [TRACKING] tag in front of them.

Import Field – Enter the column number of the field in the import file that you wish to place in the field name specified. If you leave it blank, nothing will be imported into that field.

Update If Blank – If you specify an Import Field to use in the file being imported from the shipping software, but that field is blank in the import file, check this box to write the blank value, anyway. If the Update If Blank box is cleared, then the target field will be left alone if nothing is in the column in the import record.

After Import

The last two fields on the screen determine what is done with the import file after the import is complete.

Delete Files After Import – Check this box if you wish to simply remove files after import.

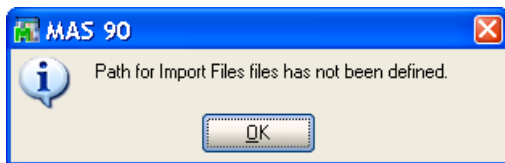
After Import Move Files to Folder – If you do not check the Delete Files After Import box, you can specify a folder to which those files must be moved.

Section D: System Operations

Import Shipping Information

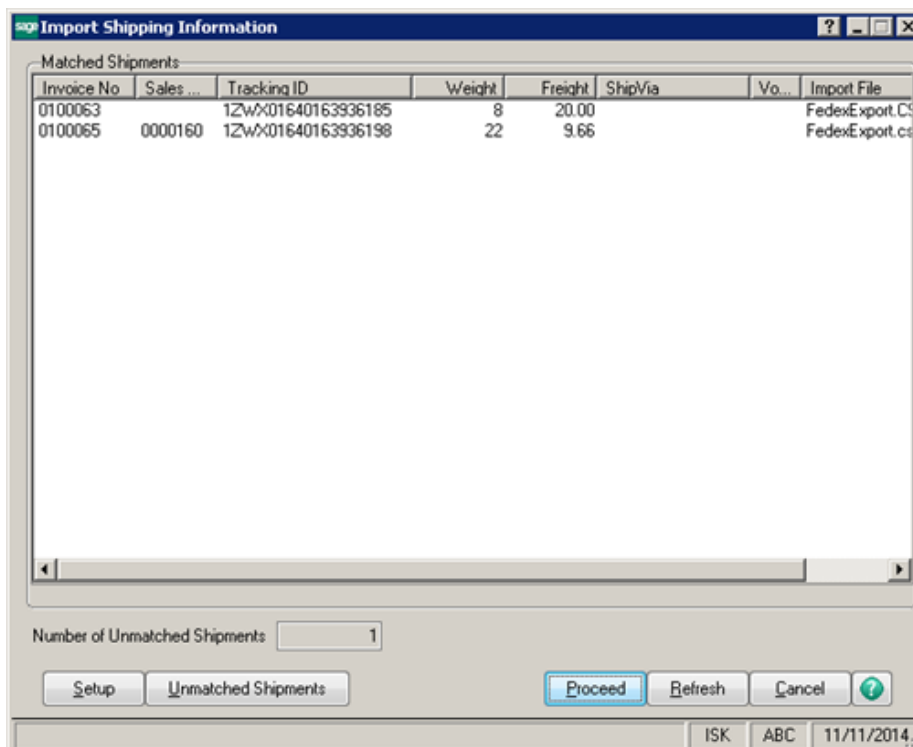
A new option has been added to the SAGE 100 Sales Order Main menu. The Import Shipping Information function will look for data exported from WorldShip or other shipping software and will match that data up to invoices or shipments in process based on the sales order number.

When you first select Import Shipping Information, the program will attempt to find configuration information. If it has not been configured, the following message will pop up, indicating that it does not know where to find the shipping data.



When you click OK, the Shipping Integration Setup screen will appear, allowing you to enter the setup information.

Once the configuration is done, the program will search for records from the shipping files that match invoices or shipments in the SAGE 100 system and save all records in the SO_531SOFShippingRecords table. The list box shows all matched records. It is possible that some records will not match because the sales order has not been shipped yet. It is also possible that the invoice or order number is not valid.



The far right column shows the import file the records were pulled from.

Below the list box you can see the number of unmatched records. All the unmatched records are copied to the SO_531SOFShippingRecords table and can be matched later. You can press the Unmatched Shipments button to see the unmatched records.

Setup – You can press the Setup button to get back to the Shipping Integration Setup screen described earlier.

Proceed – Press the Proceed button to update the invoices shown in the top list with the data found in the import files.

Daily Sales Reports/Updates

A modification has been made to the pre-journal calculation of Daily Sales Reports and Updates. When you select the menu option, or after you select the batch if you have invoice batching turned on, the program will review the comma-delimited files in the Import folder you specified. If any of the records in those files can be matched to any of the invoices to be printed on the journal, the following message will display.



If you answer No to the prompt, then you can return to the menu and run the new Import Shipping Information function to ensure that all the shipping information has been imported to the invoice before the invoice is updated.

Shipping Data Entry

You can also import information from your shipping software directly in the Shipping Data Entry function.

Shipping Data Entry (ABC) 5/16/2012

Shipper ID: 1 Ship Date: 5/16/2012 Order No.: 0000171
Shipping No.: 0100059 Ship Status: Shipped SO Created By: ###
Customer No.: 01-ABF American Business Futures

1. Lines 2. Shipping

Terms Code: 01 Net 30 Days
Confirm To: John Quinn
E-mail Address: artie@abf.com
Comment:
Warehouse: 001 EAST WAREHOUSE

Ship To Address:
Ship To: 2 Residential Address: ☐
Name: American Business Futures
Address: Racine Warehouse
5411 Kendrick Place
ZIP Code: 53120 State: WI
City: Racine
Country: USA United States of America

FDB:
Ship Via: UPS BLUE Tracking...
Ship Zone:
Ship Weight: 00035 No. of Pkgs: 1
Freight Amount: .00

Ship Import

Quick Print Auto Increment ☒ Accept Cancel Delete

On the Shipping panel, a new button for Shipping Integration has been added. If you also have StarShip installed, this new button will appear just above the StarShip button.

Click the Ship Import button and the program will read through the import files in the folder you specified earlier to see if any of the records match to the order that you are invoicing. If so, the Import Shipping Information panel will display so that you can quickly add the tracking numbers, weight and freight amounts to the current shipper.

Purge Unmatched Shipments

A new menu option has been added to the NAS90 Sales Order Utilities menu. Purge Unmatched Shipments utility allows you to find and remove shipping records dated on or before a certain date.

sage Purge Unmatched Shipments

Purge all Unmatched Shipments Dated on or Before 8/12/2014

Proceed Cancel

Edit Shipping Records

A new menu option has been added to the SAGE 100 Sales Order Utilities menu. Edit Shipping Records utility allows you to make changes to any field in any shipping record.

	Field Name	Field Value	Update if Blank
1	BillToAddress1	2131 N. 14th Street	<input type="checkbox"/>
2	BillToAddress2	Suite 100	<input type="checkbox"/>
3	BillToAddress3	Accounting Department	<input type="checkbox"/>
4	[TRACKING] Comment	From Shipping Import	<input type="checkbox"/>

Press the Lookup button or use the browse buttons to see and correct shipping records.

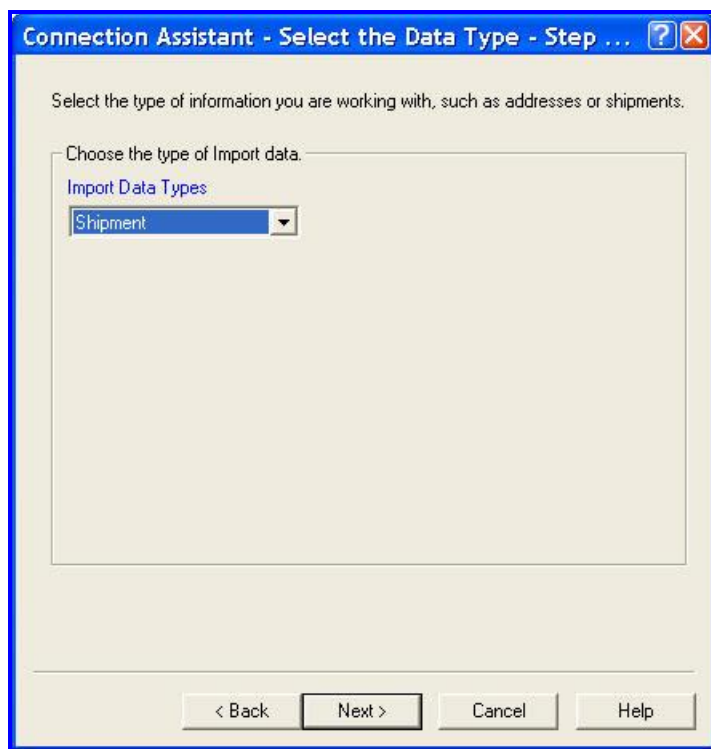
WorldShip – Create an Import Map

The following section will help in setting up WorldShip to import order information from SAGE 100, speeding up the shipping process. This import ability is a standard part of WorldShip. The procedure and the screens shown are from version 8.0 of WorldShip.

In WorldShip, the function to extract order information from SAGE 100 is called Keyed Import. The first step is to create the import map. The information is read from SAGE 100 using Open Data Base Connectivity (ODBC), which requires that a Data Source Name (DSN) be defined. You could use the standard SOTAMAS90 DSN, which comes with SAGE 100, but this can cause issues with WorldShip because it tries to verify every table that is defined in the dictionaries. To make this process more efficient, this modification has installed a new dictionary that only includes the sales order file. Follow the procedure below to define a new DSN and a new import map.

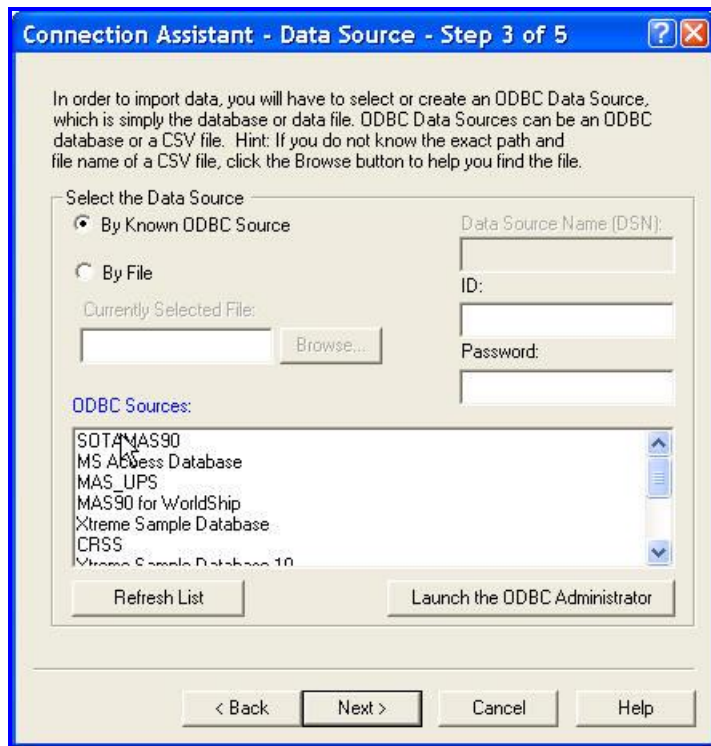


From the WorldShip screen, click on UPS OnLine Connect and select Connection Assistant.

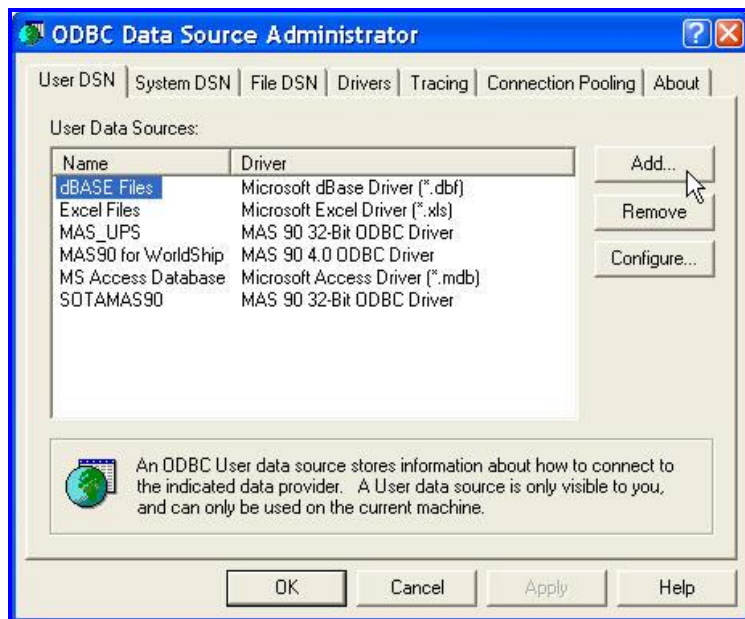


The data type that you want to import is Shipment. Select Shipment from the list and click Next.

Creating a Data Source Name



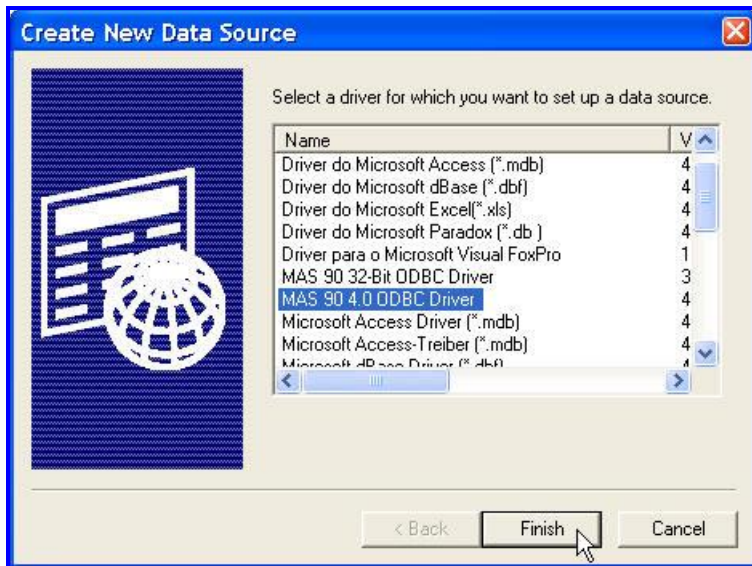
At this point, you may have to create a new DSN to use the limited dictionary provided with this modification. Check the By Known ODBC Source and click the button to “Launch the ODBC Administrator.” If you have already created a DSN to use, you can skip this section and go the Define Import Map.



The ODBC Administrator is a standard Windows tool to create and edit DSNs. You can also get to this tool from the Administrative Tools folder of the Control Panel.

Click the Add button to create a new DSN. The DSN you are about to create is very similar to the SOTAMAS90 DSN that you will probably see in the list if SAGE 100 has already been installed on this workstation.

NOTE: If SAGE 100 has not been installed, you will need to run workstation setup to make sure you have the appropriate Sage ODBC drivers available.



Select the “MAS 90 4.0 ODBC Driver” from the driver list. If you do not see this driver, then you will probably need to run SAGE 100 WorkStation setup. Click the Finish button to continue.



The ProvideX ODBC Driver Setup will display a screen with several panels that you need to fill in. The first panel, or tab, displayed is Basic.

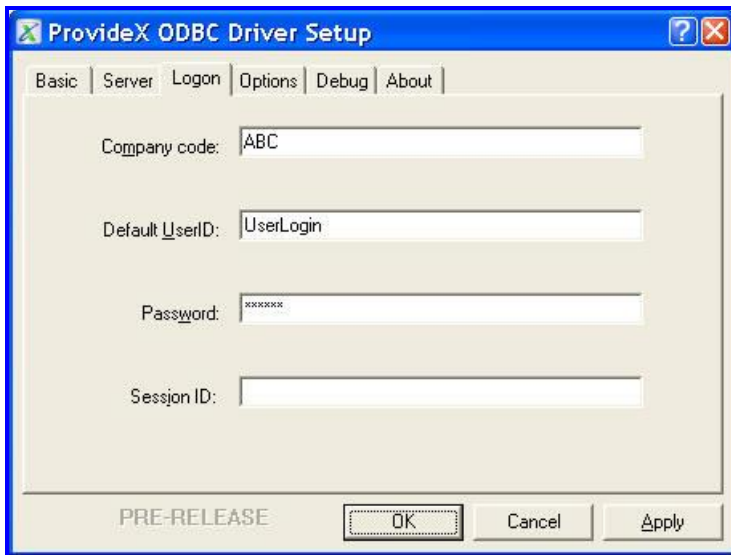
Data Source Name – We assigned a name MASUPS, but you can create any unused name that you wish. This is the name that will show up in WorldShip when you are asked to select a DSN.

Description – Enter a meaningful description.

Database Directory – This is important. Enter the folder where your SAGE 100 data resides, followed by UPSDicts. It is best if you use a URL address. If you choose to use a drive letter, make sure that the drive letter will be mapped the next time you start up this workstation.

Definition File – Leave this field blank.

Once you have filled in the three important fields, click on the Logon tab.



You must enter the information necessary for the user to log on to SAGE 100 and gain access to the Sales Order header file. It is recommended that you create a specific SAGE 100 user for this purpose and give that user very limited rights to the SAGE 100 system. The only table that needs to be read is SO_SalesOrderHeader. You will need to specify the company code, the default user ID, and the password. You can ignore the Session ID.

Once you have filled in the information, click on the Options tab to continue.

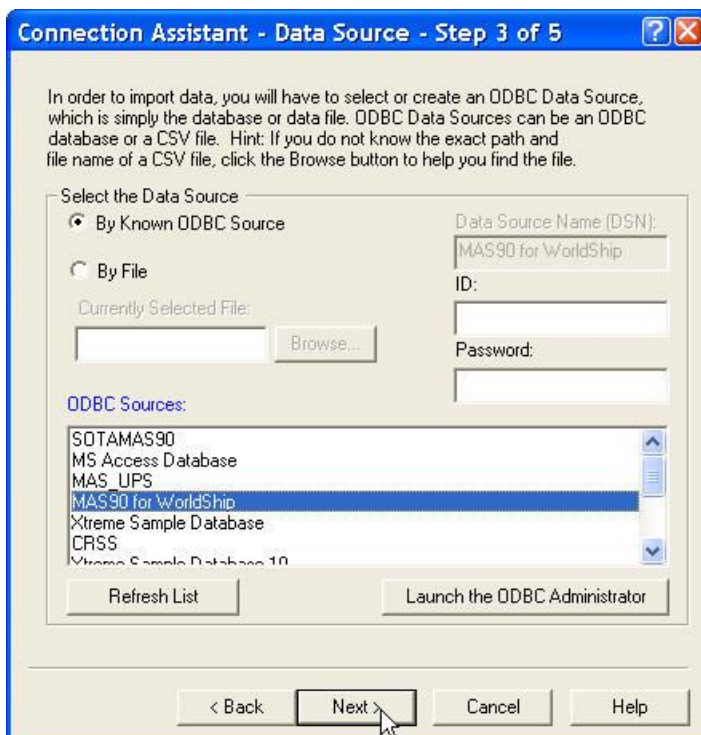


The import piece of information on this tab is the Prefix for data files. You must enter the exact path to the folder where SAGE 100 is installed. This is not the same path that you entered on the Basic tab. This path does not have UPSDicts on the end of it.

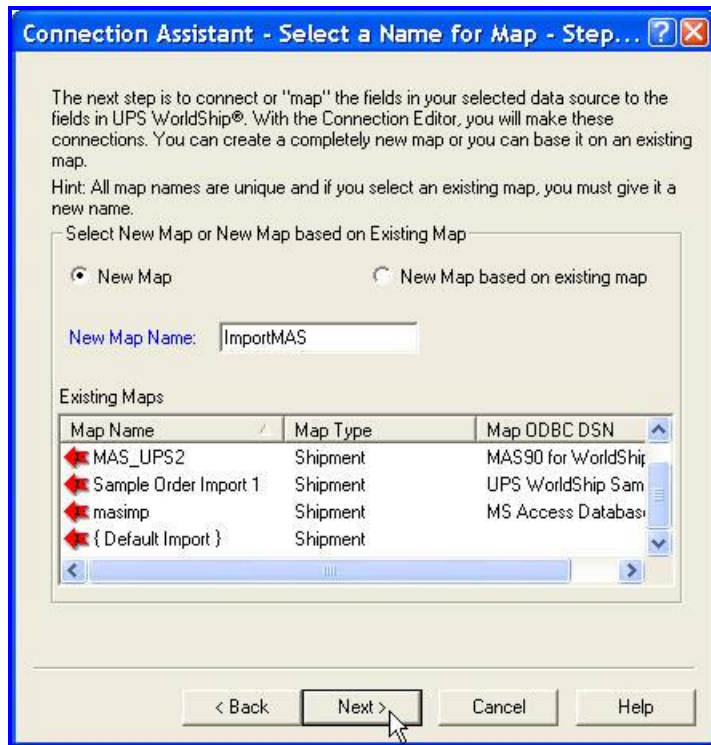
You can also click Dirty Read and Burst Mode since these options can improve performance. These are not required, however.

Once you have filled in this tab, click OK to save the new DSN and return to the ODBC Data Source Administrator screen. You can then click OK there and return to WorldShip.

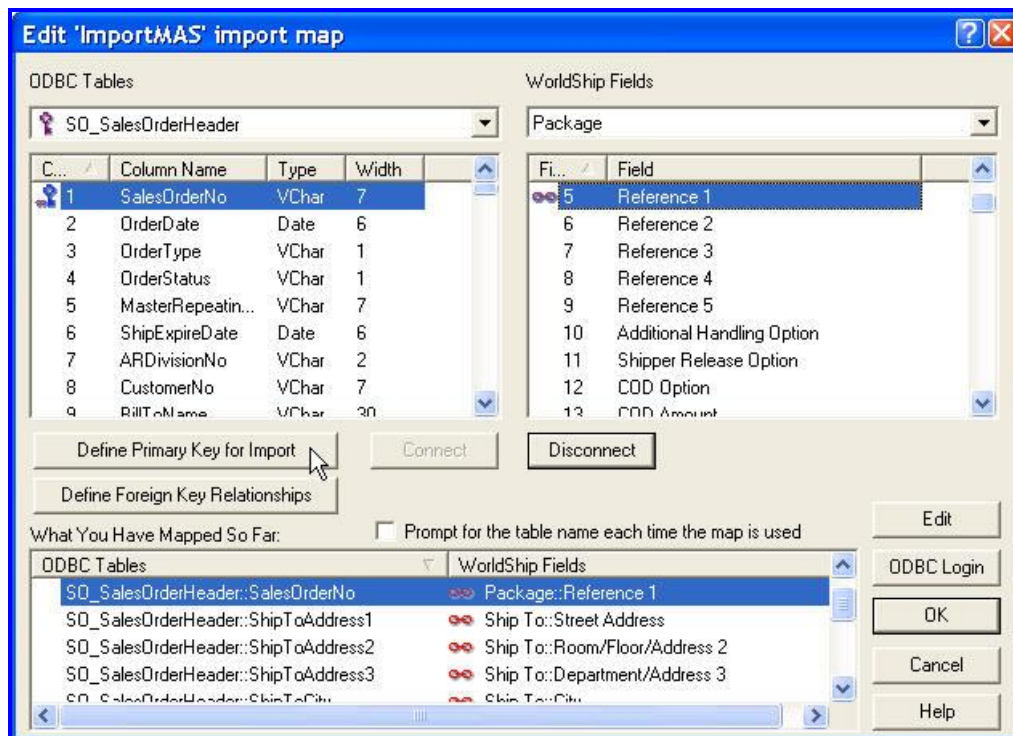
Define Import Map



Your new DSN should now appear in the list of ODBC Sources. Highlight the new DSN and click Next.



Check the box for New Map and enter your desired name in the New Map Name. You can create any name you wish. In the example above we have named our map "ImportMAS."



On the left side of the panel is the list of fields available from the MAS90 SO_SalesOrderHeader table. On the right are the groups and field names for WorldShip. To match fields for import, highlight a field

on the right side, then find the group on the top row and the field in the list below the group and highlight that field. Then click the Connect button.

Define Primary Key for Import – In order to find the order information to pull into WorldShip, you must define the SalesOrderNo as the Primary Key. Highlight SalesOrderNo on the left side and click the Define Primary Key for Import.

You must assign the SalesOrderNo to one of the package Reference fields so that each package shipped can be tied back to the SAGE 100 sales order number. It really does not matter which reference field you choose. In the example above, we have connected SalesOrderNo to Reference1. The important thing is that this is the same field you must export back to SAGE 100 with the shipping information.

Here are some typical mappings for the import into WorldShip. Note that you can change these if you wish.

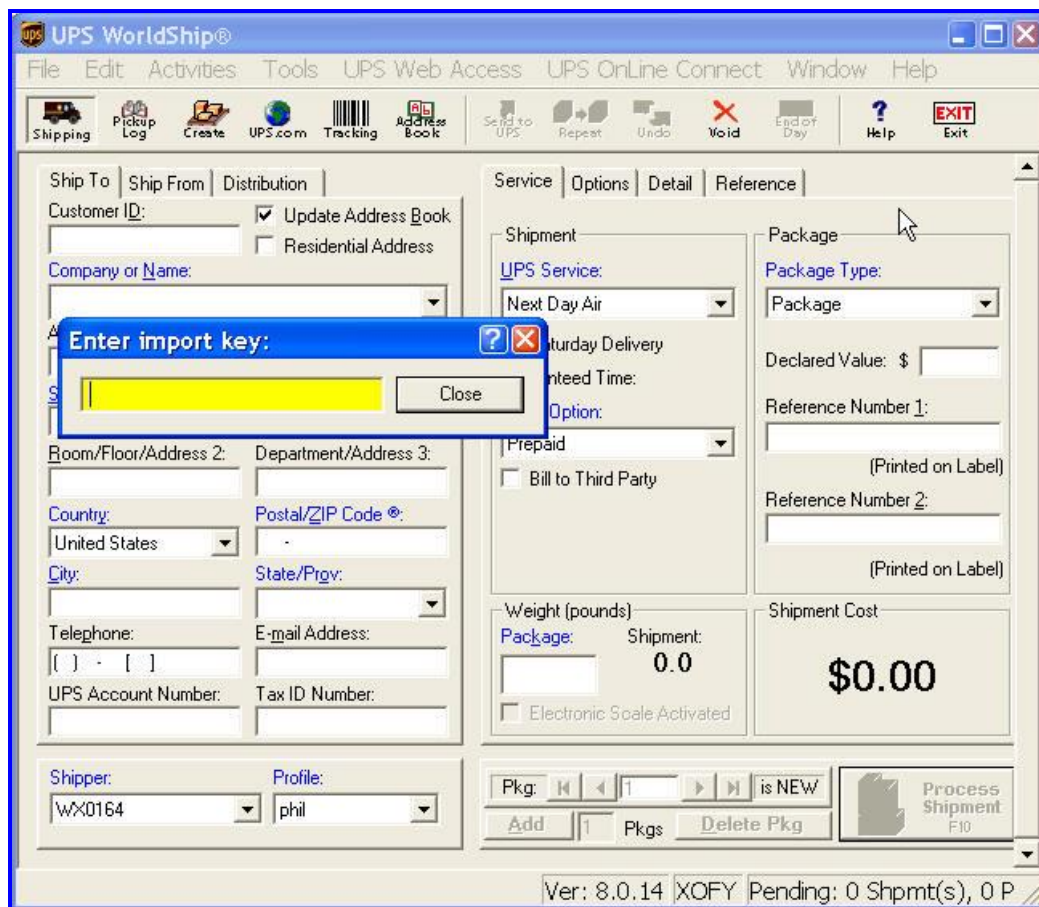
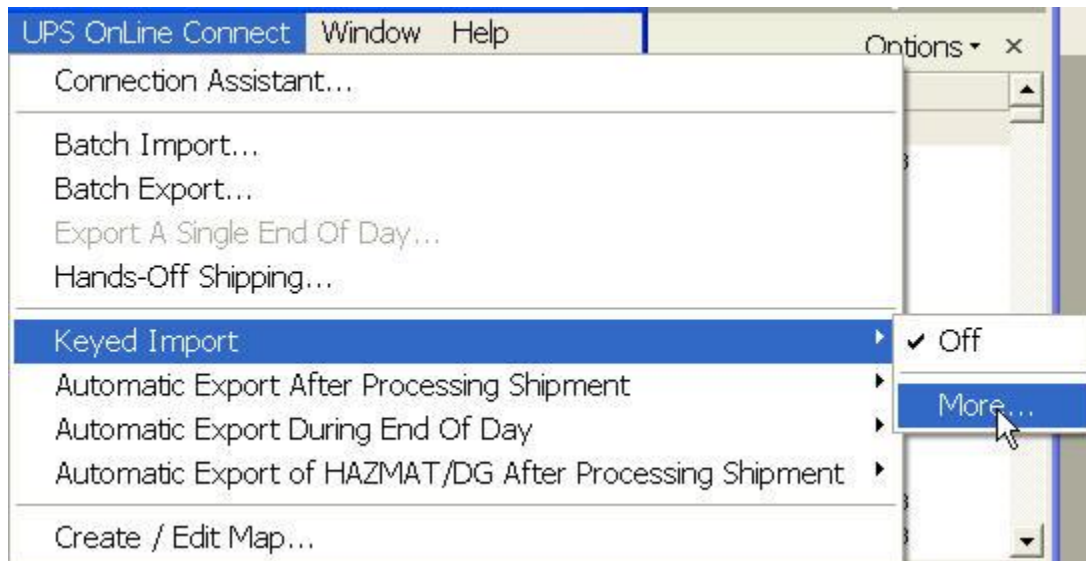
SO_SalesOrderHeader::SalesOrderNo	Package::Reference 1
SO_SalesOrderHeader::ConfirmTo	Ship To::Attention
SO_SalesOrderHeader::ShipToName	Ship To::Company or Name
SO_SalesOrderHeader::ShipToAddress1	Ship To::Street Address
SO_SalesOrderHeader::ShipToAddress2	Ship To::Room/Floor/Address 2
SO_SalesOrderHeader::ShipToAddress3	Ship To::Department/Address 3
SO_SalesOrderHeader::ShipToCity	Ship To::City
SO_SalesOrderHeader::ShipToState	Ship To::State/Prov
SO_SalesOrderHeader::ShipToZipCode	Ship To::Postal/ZIP Code
SO_SalesOrderHeader::ShipToCountryCode	Ship To::Country
SO_SalesOrderHeader::ShipVia	Shipment Information::Service Type

NOTE: In the above example, Ship Via is connected to WorldShip Shipment Information: Service Type. It is probably that the SAGE 100 Ship Via codes do not exactly match the Service Type fields used by UPS. You can take advantage of WorldShip's translation feature to make them match. When the two fields are highlighted, click the Edit button. Then click the translate button and select Service from the list. This will bring up a list of the Service Types for WorldShip. You can then select each service type in the list and change the External Field to match your SAGE 100 Ship Via codes.

Once you have linked all the fields you wish to import from SAGE 100, click OK to save the new import map.

Keyed Import

The final step is to tell WorldShip that you wish to start Keyed Import, and to specify which import map to use. Click on UPS OnLine Connect then Keyed Import. You may have to click the More option to display all the import maps available. Select the map that you just created.



If the map is properly defined, a new window will appear for you to enter the Import Key. This is the seven character sales order number, and it must have the leading zeroes. Once you enter a valid order number, the fields you mapped in the section above will automatically copy over to the shipment.

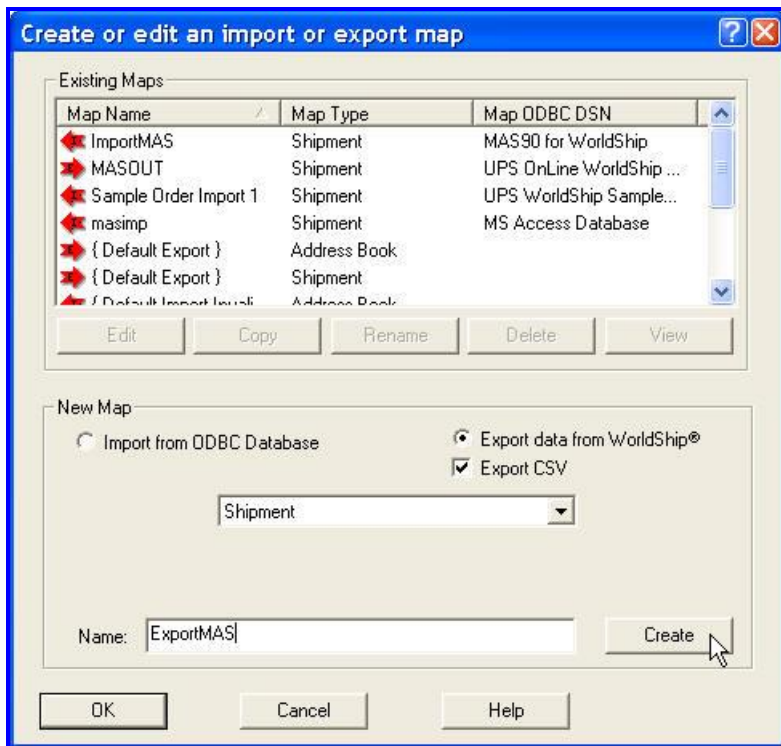
NOTE: It is important that the Sales Order number from SAGE 100 be copied to a reference field for every package. Use the Tools / Profile option to define a profile for each user of WorldShip. On the

Reference tab, click the box to tell it to Use on All Packages for the reference field that you have chosen for the order number.

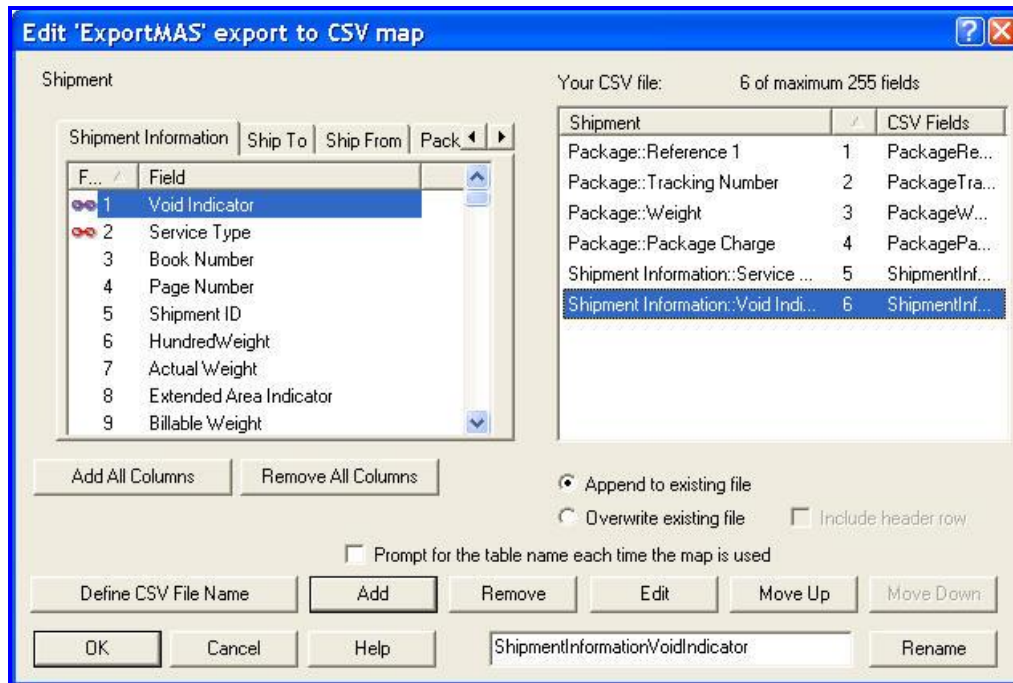
Exporting WorldShip Shipping Information

The final configuration to make the transfer of shipping information back to SAGE 100 is to tell WorldShip how to export back to SAGE 100. This is a standard feature of WorldShip and is not part of this modification, but the following screens will help in this process.

From the UPS OnLine Connect menu select Create/Edit Map.



In the New Map section, check the Export data from WorldShip and the Export CSV option. In the dropdown list, select Shipment and enter the name that you wish to give to your new Export Map. Click OK to proceed to the mapping screen.



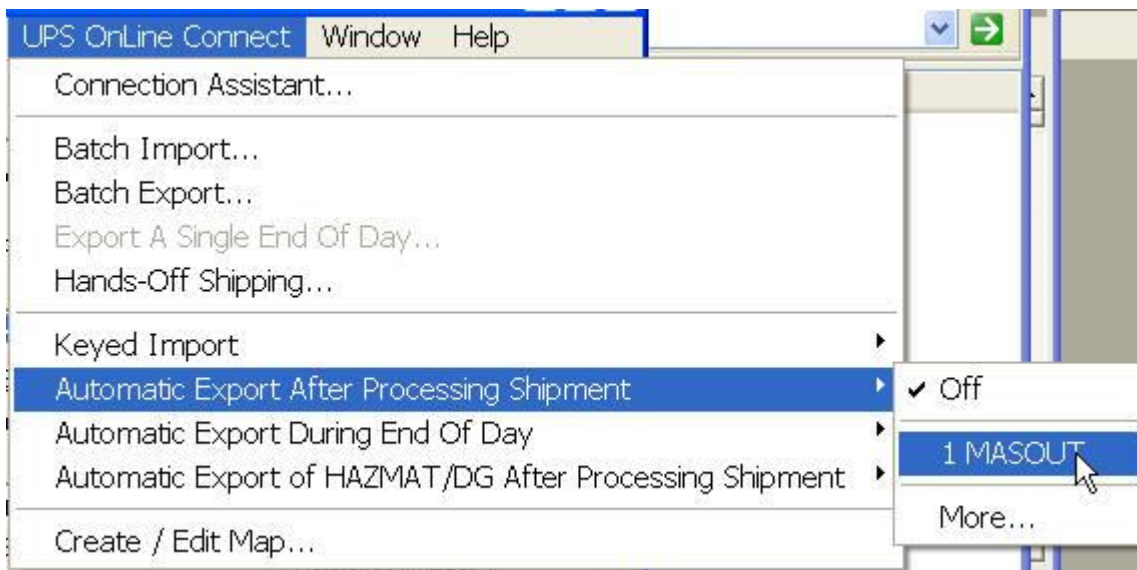
On this screen, choose the tab for the group and the field to add to the comma-delimited file you will create. On the right side of the picture above you will see an example of the standard fields that can be imported into SAGE 100 with this modification.

It is important that you click the box next to Append to Existing File so that you can process many shipments through WorldShip without having to run the SAGE 100 Import Shipping Information every time.

You will also want to click on the Define CSV File name in order to tell WorldShip where to put the information that it exports. The folder you enter here is the same folder that you specified as the import folder in the Import Shipping Information defaults.

If you choose to export the Service Type field, you may again want to Edit the field and select Translate to convert the UPS Service Type names back to your SAGE 100 Ship Via names.

When you have completed the mapping, click OK to save your new export map.

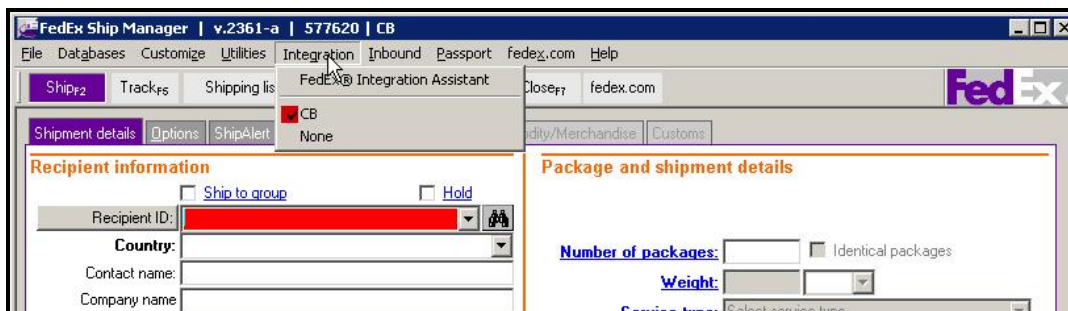


Finally, from the UPS OnLine Connect menu, select Automatic Export After Processing Shipment, then select the new export map. This will cause WorldShip to add to the comma-delimited file every time a shipment is processed. That information will then be available for import into SAGE 100 on a real-time basis.

FedEx – Create an Import Map

The following section will help in setting up FedEx Ship Manager. This import ability is a standard part of FedEx Ship Manager. The procedure and the screens shown are from Version .2361-a.

In FedEx Ship Manager, users must set up the Integration between SAGE 100 and FedEx Ship Manager using the FedEx Integration Assistant. The first step is to create the import MASP. The information is read from SAGE 100 using Open Data Base Connectivity (ODBC), which requires that a Data Source Name (DSN) be defined. You could use the standard SOTAMAS90 DSN, which comes with SAGE 100, but this can cause issues with FedEx Ship Manager and users would have to enter their SAGE 100 credentials every time they connect to the database. Follow the procedure below to define a new DSN and FedEx - SAGE 100 Integration connection.



From the FedEx Integration Assistant “What do you want to do” screen, choose “Create New Profile”.

FedEx® Integration Assistant | What do you want to do?

Welcome **Begin** Import Export Finish Help

Create Integration Type

What do you want to do?

Select "Create a new profile" to start a new profile. Select "Edit an existing profile" if you want to create a new profile by editing an existing profile, or if you want to complete an unfinished profile.

☒ **Create a new profile**
Start a new profile (Clears all unsaved changes).

☐ **Edit an existing profile**
Select the profile that you want to edit. To delete a profile, select it, and then click Remove.

☒ **Continue with current profile.**

Common Questions

[The profile I want to edit is not in the list. What should I do?](#)

[What is a profile with the name profile#?](#)

[How many integration profiles can I create?](#)

[Tutorial](#)

Editing Profile

On the "Which type of integration profile do you need?", choose "Both Import and Export".

FedEx® Integration Assistant | Which type of integration profile do you need?

Welcome **Begin** Import Export Finish Help

Create Integration Type

Which type of integration profile do you need?

Select the type of profile that you want to create.

☐ Import

☐ Export

☒ **Both Import and Export**

Your Data Source

Customer ID	Company	Country	Contact
AA001N002	Atlas Machine	USA	Swicegood
AX002A001	Baskets Galore	Canada	Jones
AX003S001	Best Computers	USA	Davis
BB001J002	Taylor Finishing	USA	Rinehart

Export

Import

Recipient Information

Recipient ID: AX002A001
Country: CA-CANADA
Contact Name: Gwen Jones
Address 1: Baskets Galore
Address 2: 1234 Central Blvd.
City: ***

Editing Profile

Import

Next the user will need to use the ODBC – DSN they previously setup for the MAS90 directory. **Please refer to “Creating a Data Source Name” to reference the settings needed for the DSN-ODBC connection.**

The screenshot shows the 'FedEx® Integration Assistant' window with the title 'Where do you store your shipping information?'. The interface includes a tabbed menu at the top with 'Welcome', 'Begin', 'Import' (selected), 'Export', and 'Finish'. Below this is a sub-menu with 'Source' (selected), 'Format', 'Shipping', 'Lookup', 'Information', 'Match', and 'Conversion'. A 'Help' button is in the top right. The main content area is titled 'Where do you store your shipping information?' and contains instructions: 'Select the source of the shipping information that you want to integrate. Your data source may be an ODBC-compliant data source, a text file, or other external application (QuickBooks, etc.). [Learn More...](#)'. There are three radio button options: 'ODBC (Open Database Connectivity Data Source Name)' (selected), 'Text File', and 'Other'. Under the 'ODBC' option, a list of data sources is shown in a table-like format. The 'ShippingIntegration' entry is highlighted in yellow. To the right of the list is a 'Common Questions' sidebar with links: 'My DSN is not in the list. What should I do?', 'What is ODBC Data Source Administrator?', 'What do I need to know about my data source?', 'How should I set up my integration to Excel?', 'What is a text file?', and 'Tutorial'. At the bottom, there is an 'Editing Profile' label, 'Back' and 'Continue' buttons with arrows, and a 'Save' button.

Source Name	Driver
RITI_AM_SQL	SQL Server
Shipnet2000	Cafe Adaptive Server Anywhere 9.0.2
HistoricalDB	Cafe Adaptive Server Anywhere 9.0.2
crs_db	Cafe Adaptive Server Anywhere 9.0.2
ShippingIntegration	MAS 90 4.0 ODBC Driver

For the “How will you create shipping labels for your package?” screen, choose the appropriate selections for your organization and click on “Continue”.

FedEx® Integration Assistant | How will you create shipping labels for your packages?

Welcome Begin **Import** Export Finish Help

Source Format **Shipping** Lookup Information Match Conversion

How will you create shipping labels for your packages?

Answer each question that appears below. FedEx Integration Assistant will select the best shipping method based on your answers. If your answers vary by situation, answer the questions appropriate for the first situation, complete the profile, and then run FedEx Integration Assistant again to create a profile for each additional situation.

Do you print labels one at a time? ☒ Yes ☐ No

Do you use a unique name or code to look up each package? ☒ Yes ☐ No

Do you need to edit shipping information before printing the label? ☒ Yes ☐ No

More Automated ← Batch Batch Edit Single **Single Edit** → Less Automated

Editing Profile

Common Questions

- [What do I need to know about package processing?](#)
- [I process Multiple Piece Shipments. Can I choose the Single-Edit shipping method?](#)
- [What does it mean to "look up" a package?](#)
- [What are the differences between each shipping method?](#)
- [Tutorial](#)

For the “How do you want to lookup and import information” screen, choose “After I enter a lookup value”, then Click on “Continue”.

FedEx® Integration Assistant | How do you want to lookup and import information?

Welcome Begin **Import** Export Finish Help

Source Format Shipping **Lookup** Information Match Conversion

How do you want to lookup and import information?

Select the method below that most closely supports your shipping process.

☒ **After I enter a lookup value**
Uses the value that you type into the lookup dialog box to lookup the record.

☐ After I enter a Recipient ID
Uses the value you type into the Recipient ID text box to lookup the record.

Lookup Value

Enter the lookup value for the package(s) you wish to import.

Lookup:

Select the position you would like to leave the cursor after a lookup:

Editing Profile

Common Questions

- [When would I use a unique Lookup Value?](#)
- [When would I use a Recipient ID?](#)
- [Tutorial](#)

On the “What types of information do you want to import?” screen, choose “Recipient” and “Package”, then click on “Continue”.

FedEx® Integration Assistant | What types of information do you want to import?

Navigation: Welcome | Begin | **Import** | Export | Finish | Help

Sub-navigation: Source | Format | **Shipping** | Lookup | Information | Match | Conversion

What types of information do you want to import?

Select the FedEx Ship Manager data group(s) that you want to populate with data from your data source. The category choices provided here match the key data entry areas in FedEx Ship Manager.

- ☒ Recipient
- ☒ Package
- ☐ Sender
- ☐ Special Services
- ☐ International
- ☐ All Fields

Common Questions:

- [What shipping information is in each category?](#)
- [What information is required to ship a package?](#)
- [How do I use the All Fields option?](#)
- [Tutorial](#)

Editing Profile [Back](#) [Continue](#) [Save](#)

Next, users will select the tables and fields to relate the address, city, state, and company for the import.

FedEx® Integration Assistant | Match FedEx Ship Manager fields with your fields.

Navigation: Welcome | Begin | **Import** | Export | Finish | Help

Sub-navigation: Source | Format | Shipping | **Lookup** | Information | Match | Conversion

Match FedEx Ship Manager fields with your fields.

For each FedEx Ship Manager field, select a table and field from your data source to match for import. You may optionally assign a standard default value instead of selecting your field. Click the radio button next to a field to view the advanced properties for the field.

	Table	Field	Default (Optional)
Shipment Data			
Recipient - Address			
<input type="radio"/> Address 1	SalesOrderHeader	ShipToAddress1	
<input type="radio"/> Address 2	SalesOrderHeader	ShipToAddress2	
<input type="radio"/> City	SalesOrderHeader	ShipToCity	
<input type="radio"/> Company	SalesOrderHeader	ShipToName	
<input type="radio"/> Country	Select your table	Select your field	US - UNITED STA
<input type="radio"/> Phone	Select your table	Select your field	

Once you have matched all the above fields, identify the key index field(s) for the table(s) you have selected. [Select Index](#)

[Advanced](#)

Common Questions:

- [How do I know what tables and fields to select?](#)
- [The table or field I need is not in the list. What should I do?](#)
- [What are defaults?](#)
- [How do I use Read Scale?](#)
- [What does the Advanced button do?](#)
- [What is a field index?](#)
- [Tutorial](#)

Editing Profile [Back](#) [Continue](#) [Save](#)

Users can skip the Conversion Screen.

Export

Destination- For “Where do you want to send shipping information”, choose the location where SAGE 100 is set to look for the CSV import file. *Refer to Import Shipping Information.*

Format- For “What is the format and structure of your text file?”, screen users will need to specify the format to export the file. Current examples have been comma delimited.

FedEx® Integration Assistant | What is the format and structure of your text file?

Welcome Begin Import **Export** Finish Help

Destination **Format** Method Information Match Conversion

What is the format and structure of your text file?
Answer each question that appears below.

What kind of text file are you using to store your data?

☒ Delimited – Fields are separated by a character such as a comma
☐ Fixed Width – Fields are aligned in columns

What character separates your fields?
{comma}

Does the first row contain field names (headings)?
☐ Yes ☒ No

Below is sample data from your text file:

```
"0000180","419727484259","20.50","1","1"  
"0000180","419727484260","26.25","1","5"
```

Common Questions

- [What is a text file?](#)
- [Tutorial](#)

Editing Profile Back Continue Save

Method- Exporting can be user defined. It is important to insert a new record when updating information.

FedEx® Integration Assistant | How will your data source receive exported information?

Welcome Begin Import **Export** Finish Help

Destination Format **Method** Information Match Conversion

How will your data source receive exported information?
Select the event that will trigger the export and the method for writing information to the destination data source.

NOTE: To avoid unintentionally corrupting the data source, the export method that you choose here must be compatible with the structure of your data source. Contact your IT department if you are unsure of which option to use.

When do you want to export to your data source?

☒ Each time a shipment is completed
☐ At the end of day

How do you want to update your data source?

☒ Insert a new record
☐ Update an existing record

Common Questions

- [What is a record?](#)
- [What does inserting a record do?](#)
- [What does updating a record do?](#)
- [When should I use the "When a package is deleted" option?](#)
- [Tutorial](#)

Editing Profile Back Continue Save

Information- Choose the information to export to the CSV file.

FedEx® Integration Assistant | What types of information do you want to export?

Navigation: Welcome | Begin | Import | **Export** | Finish | Help

Sub-navigation: Destination | Format | Method | **Information** | Match | Conversion

What types of information do you want to export?
Select the FedEx Ship Manager data groups that contain information you want to send back to your data source. Category choices match the key data entry areas in FedEx Ship Manager.

- ☒ Tracking Number
- ☒ Charges
- ☒ Package
- ☐ Recipient
- ☐ Sender
- ☐ Special Services
- ☐ International
- ☐ All Fields

Common Questions

- [What is a tracking number?](#)
- [What shipping charges can I export?](#)
- [How do I use the All Fields option?](#)
- [Tutorial](#)

Editing Profile [Back](#) [Continue](#) [Save](#)

Match- Choose the location in the export file to place the exported information.

FedEx® Integration Assistant | Match FedEx Ship Manager fields with your fields.

Navigation: Welcome | Begin | Import | **Export** | Finish | Help

Sub-navigation: Destination | Format | Method | Information | **Match** | Conversion

Match FedEx Ship Manager fields with your fields.
For each FedEx Ship Manager field, select a table and field from your data source to match for export. You may duplicate a field if you want to export the data to more than one location in your data source.

	Table	Field
Shipment Data		
Tracking Number		
<input type="radio"/> Tracking Number	FedexExport.csv	Field2
Charges - Customer Rates		
<input type="radio"/> Net Charge	FedexExport.csv	Field3
Package - Miscellaneous		
<input type="radio"/> Customer Reference	FedexExport.csv	Field1
<input type="radio"/> Service Type	FedexExport.csv	Field4
<input type="radio"/> Weight	FedexExport.csv	Field5

[Advanced](#)

Common Questions

- [How do I know what tables and fields to select?](#)
- [The table or field that I need is not in the list. What should I do?](#)
- [When would I duplicate a field?](#)
- [What does the Advanced button do?](#)
- [What is a field index?](#)
- [Tutorial](#)

Editing Profile [Back](#) [Continue](#) [Save](#)

Conversion- This page is used to convert data from FedEx Ship Manager into something meaningful for the end user. An example would be Shipping Codes.

FedEx® Integration Assistant | Convert FedEx Ship Manager fields to your fields.

Welcome Begin Import **Export** Finish Help

Destination Format Method Information Match **Conversion**

Convert FedEx Ship Manager fields to your fields.

Click the FedEx Ship Manager field(s) on the far left that you want to convert. A list of available FedEx Ship Manager values will appear in the orange box. Select your value from each drop-down menu, or type in a value, to match the FedEx Ship Manager value.

Shipment Data

Package fields

◆ Service Type

From (FSM value)	To (your value)
Priority Overnight	<None>
Standard Overnight	<None>
2 Day	<None>
First Overnight	<None>
Express Saver	<None>
Ground	<None>
Ground Home Delivery	<None>
1 Day Freight	<None>
2 Day Freight	<None>
3 Day Freight	<None>
International Priority Over	<None>
International First Overn	<None>

Common Questions

[What is conversion?](#)

[When do I have to convert the format of my data to match the format required by FedEx?](#)

[Tutorial](#)

Editing Profile Back Continue Save

FedEx Ship Manager

After the FedEx Ship Manager Integration is configured correctly users should be able to use the Lookup feature to find Sales Order Information and populate the Ship Manager's fields with relevant data.

Lookup Value

Enter the lookup value for the package(s) you wish to import.

Lookup:

OK Cancel

The screenshot displays the FedEx Ship Manager application window. The title bar reads "FedEx Ship Manager | v.2361-a | 577620 | CB". The menu bar includes File, Databases, Customize, Utilities, Integration, Inbound, Passport, fedex.com, and Help. The toolbar contains buttons for Shippr2, Trackr5, Shipping list, Address Book, Report, CloseF, and fedex.com. The main interface is divided into several sections:

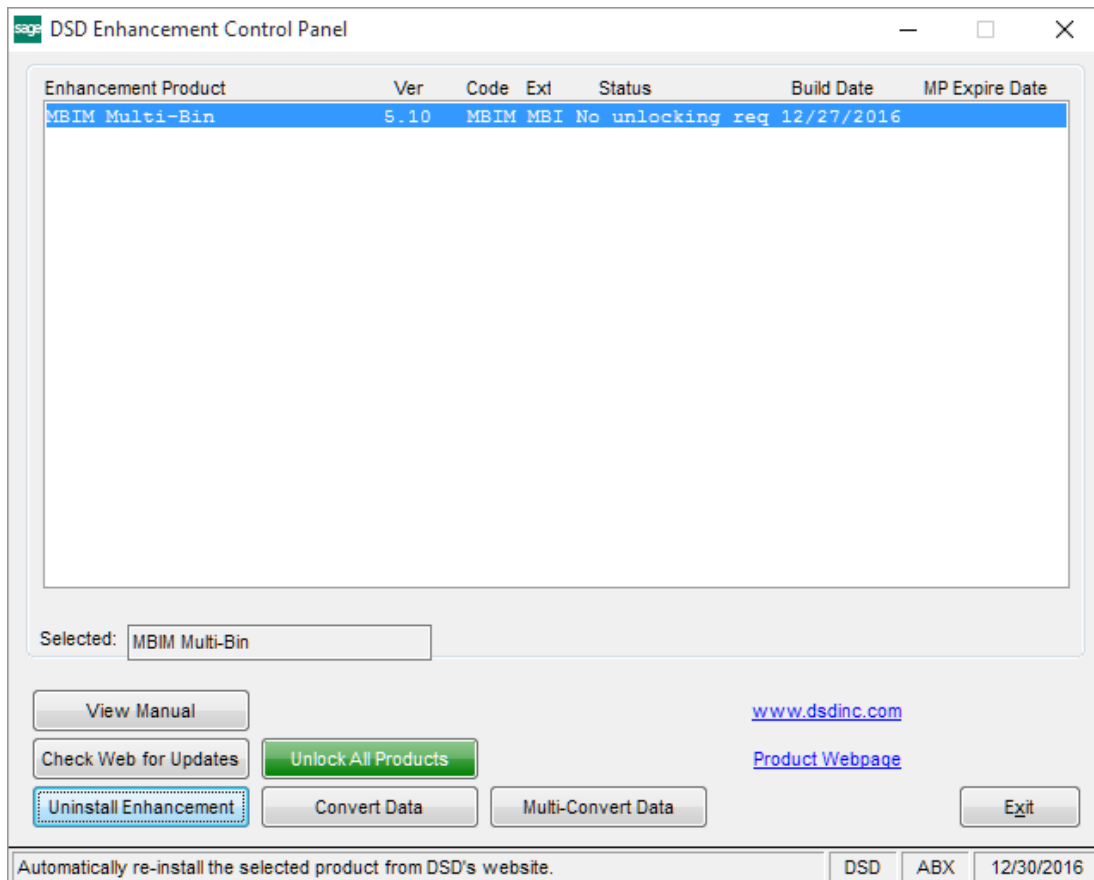
- Recipient information:** Includes fields for Recipient ID (Select recipient...), Country (US - UNITED STATES), Contact name, Company name (Orange Door & Window Co.), Address 1 (56 Technology), Address 2, Zip (92618-2301), State (CA), City (Irvine), Telephone, and Location #. There are checkboxes for "Ship to group", "Hold", "This is a residential address", and "Save in/Update my address book".
- Package and shipment details:** Includes Number of packages (1), Weight (0.0 lbs), Service type (Select service type...), Package type (Select package type...), Package dimensions, Ship date (09/09/2009), and Declared value (0).
- Sender information:** Includes Current sender (redacted), Change sender, and Change return address (Current sender).
- Billing details:** Includes Bill transportation to, Acct # (233974897), Department notes, Customer reference (0000184), P.O. number, and an Add handling button.

At the bottom, there is a status bar with buttons for Clear fields, Delete/Modify shipment, Repeat shipment, Override prefs11, Rate quote (\$0.00), Multiple-piece shipment, and Ship via. The date and time displayed are Wednesday, September 09, 2009 03:34:56 PM.

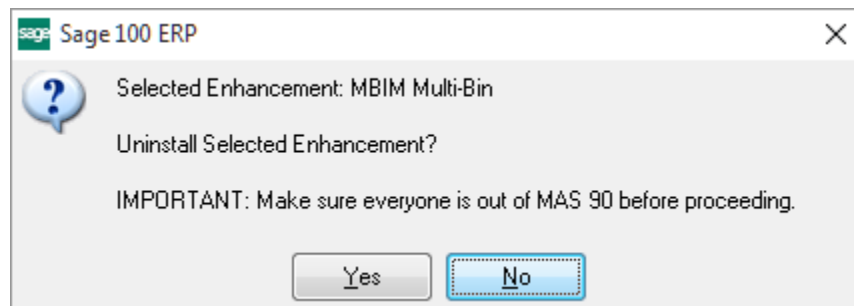
Depending on your setting, the CSV file you specified will populate with shipping information and will be waiting for you to import the data into SAGE 100.

Section E: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.

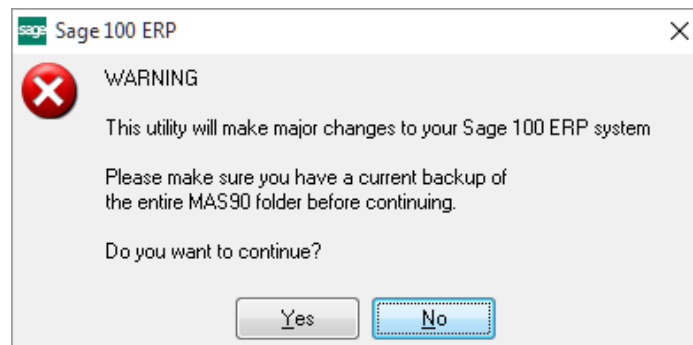


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.



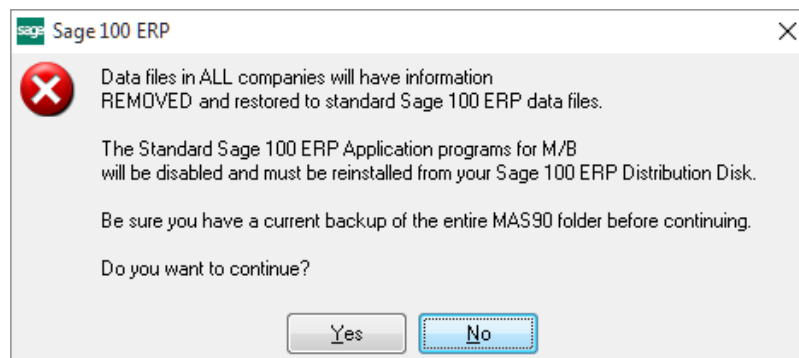
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

A message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

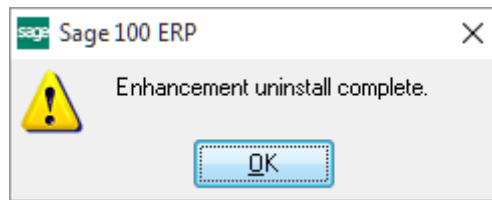
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

The following message box will appear, displaying the final warning message.



Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process. At this point, the DSD Enhancement will be removed from the Sage 100 system.

After completion of the Uninstall, the following message box will appear. Select OK to continue.



Now that the Uninstall process is completed, you must:

- Reinstall the applicable standard Sage 100 modules
- Reinstall the latest Sage 100 Service Pack/Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard Sage 100 module(s).