Faye Business Systems Group

Enhancement for Sage MAS 90 and MAS 200

<u>The UPS & FedEx Integrator for MAS90</u>

Overview

The UPS & FedEx Integrator for MAS90 allows you to easily import tracking numbers, ship dates, and freight amount from your UPS or FedEx shipping software. Imports can be automated on a schedule without human intervention. In addition, tracking numbers are imported by <u>sales order number</u> and can later be linked to invoices automatically. Other imports require an invoice number to be known prior to importing, but our enhancement only requires the export of the related sales order number from the shipping software. This means you can import data and use the imported information no matter how your business works.
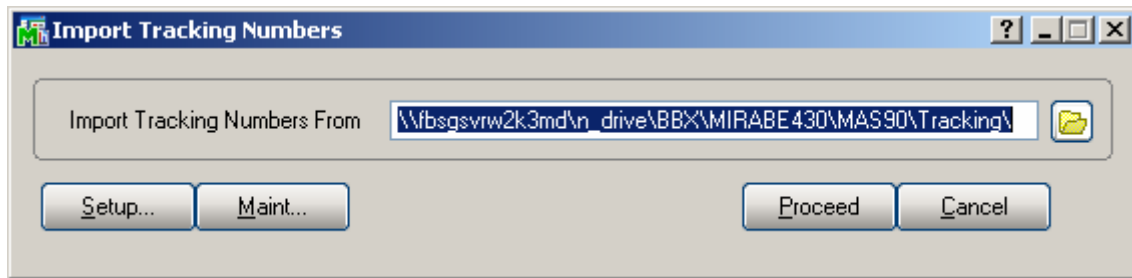
Key Features & Functions

- Import tracking numbers, ship dates, and freight amounts

- Works with UPS Worldship and FedEx Shipment Manager standard export functions (no special programming required)

- Data can be imported into sales order, invoices, or both

- Process can be completed automated and run from Windows Scheduler. UPS and FedEx Software can be configured to automatically generate export files, and a scheduled task can be configured to automatically import data into MAS90 or MAS200.
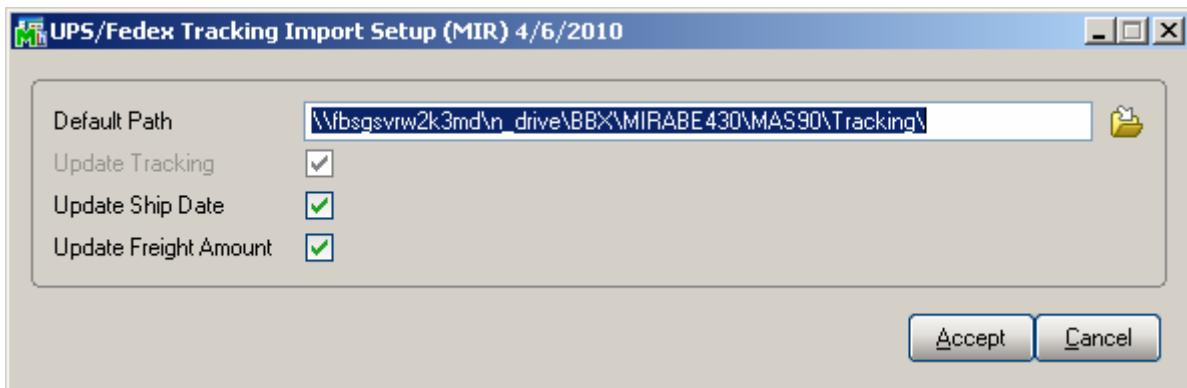
Integration Setup

1.   Launch MAS90.

2.   Select **Sales Order** from the *MAS90 Modules Menu*.

3.   Select **UPS/Fedex Tracking Number Import** from the *Sales Order Main Menu*.

4.   Press the **Setup** button

       Note: This button will be disabled unless the user has *UPS/Fedex Tracking Import Setup* flagged
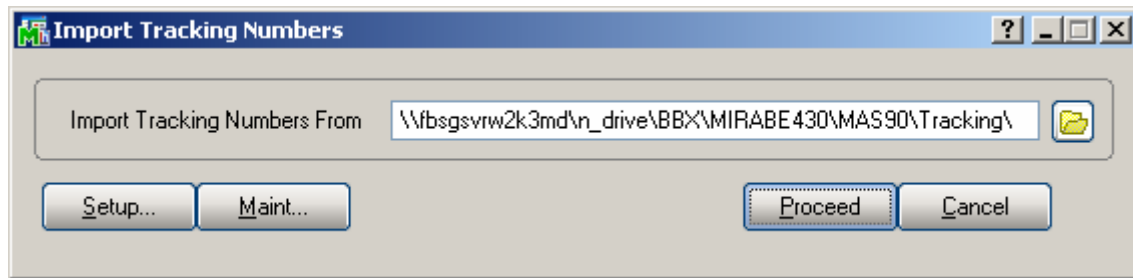   as available in **Role Maintenance**.

5.   Enter or select a *Default Path* to import Tracking Files from.

6.   Select if the *Ship Date* and *Freight Amount* will be updated using the appropriate check boxes.
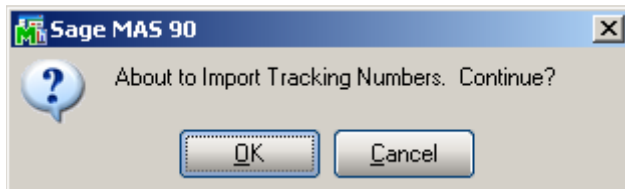
7.   Press the **Accept** button.

Import Procedure

1. Launch MAS90.

2. Select **Sales Order** from the *MAS90 Modules Menu*.

3. Select **UPS/Fedex Tracking Number Import** from the *Sales Order Main Menu*.

4. Change or select the path to import Tracking Files from. The default is the value set during the above Configuration Procedure.

5. Press the **Proceed** button.

6. Press the **OK** button on the confirmation prompt.

    All files matching the format SHIP_*.CSV in the specified directory will be processed.

7. Press the **OK** button on the completion prompt.

Reviewing Tracking Numbers

1. Select an Invoice in **S/O Invoice Data Entry** or **A/R Invoice History Inquiry** and press the **Tracking** button.

Technical Notes

1. All files matching the format SHIP_*.CSV in the specified directory will be processed.

2. After processing, files will be renamed with a date stamp and moved to an ARCHIVE subdirectory (automatically created if required) under the specified directory.

3. All imported tracking will be placed in the *SO0503563_OrderTracking.M4T* database.

4. As each line is brought in, the order number will be checked against those in the databases *SO_InvoiceHeader.m4t* and *AR_InvoiceHistoryHeader.m4t*. If a match is found, tracking records will be immediately created in the *SO_InvoiceTracking.m4t* or *AR_InvoiceHistoryTracking.m4t* as required.

5. When a Sales Order number is entered in a new Invoice, the *SO0503563_OrderTracking.M4T* database is queried for matching records. If any are found appropriate records are created in the *SO_InvoiceTracking.m4t* file immediately.

6. The import file should follow the format

   OrderNo,ShipDate,TrackingNumber,FreightAmt

   • The Ship Date should be in the format yyyymmdd.
   • If fields are flagged off in the configuration, they will still be imported but will not be copied over to the final Sage Invoice Tracking databases.

7. The import can be run without prompting by a batch file (which can be scheduled). Use the following example to build the file:

   N:

   CD \BBX\MAS90430\MAS90\Home

   N:\BBX\MAS90430\MAS90\Home\pvxwin32.exe -hd ..\launcher\sota.ini ..\soa\Startup.m4p -ARG DIRECT UIOFF USERNAME PASSWORD ABC SO0503563_TrackingImport_UI NOPROMPT050

   It is recommended that a dedicated, low security user code be used for the USERNAME and PASSWORD since they are visible in the batch file created.

Database Information

SO0503563_TrackingImpSetup UPS/Fedex Tracking Import Setup (NEW DATABASE)

Field	Type	Length
Enhancement$	String	4
UpdateTracking$	YesNo	1
UpdateShipDate$	YesNo	1
UpdateFreightAmount$	YesNo	1
DefaultPath$	String	150

SO0503563_OrderTracking SO Order Tracking (NEW DATABASE)

Field	Type	Length	
SalesOrderNo$	Account	7	
PackageNo$	Account	4	
TrackingId$	String	30	
Comment$	String	30	{ Not used at this time }
StarshipShipVia$	String	15	{ Not used at this time }
UpdateFromStarship$	YesNo	1	{ Not used at this time }
SendPackageToStarship$	YesNo	1	{ Not used at this time }
Weight	Numeric	13.2	{ Not used at this time }
FreightAmt	Number	12.2	
FreightAmtAddedToInv	Number	12.2	{ Not used at this time }
UDF_IMPSHIPDATE3563$	Date	8	

AR_InvoiceHistoryTracking AR Invoice History Tracking (UDF Addition)

UDF_IMPSHIPDATE3563$	Date	8

SO_InvoiceTracking SO Invoice Tracking (UDF Addition)

UDF_IMPSHIPDATE3563$	Date	8