Nexus 6.3.x Upgrade Summary

An expanding library of Managed File Transfers, Sage 300 Imp/Exports, Nexus Actions & Email Automations:

In addition to advancing its Sage 300 Exports/Imports, Nexus continues to leverage the *'EnableTRANS Application & Automation Framework'* to offer extended ETL & Integration functions beyond mobile data collection, including;

- **managed file transfers** of templated text and XML files to/from local folders or partner ftp endpoints,

- **transaction on-boarding** and import from Ecommerce sites, EDI Managed Services, and/or mobile ordering solutions,

- automated generation & send of **html-templated emails** for Orders, Shipments & Invoices, with optional Sage 300 reports,

- **deep integration to Sage 300** via an Adaptor that provides for all session and view integration.

Key Advancements:

Order On-Boarding of XML / CSV / TSV files from network folder or FTP/(S) site

Retrieve transactional files from a local network or partner ftp site while managing deletion, archive, duplicate checking, logging and error reporting. On-Boarded transaction files can be validated and augmented with additional data. On any error, a restart is available and logging can optionally be emailed. On success, the script will advance to produce one or multiple transactions from the raw files, ready to be batch imported manually, or automatically via a Windows Service.

While the core project demand has been on Order On-Boarding, similar workflows have been delivered for EDI-based Purchase Orders, PO Returns, Invoices and 3PL Shipment Advice & Confirmation transactions.
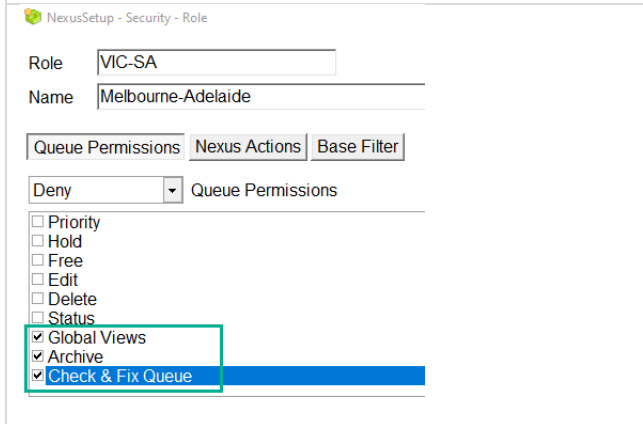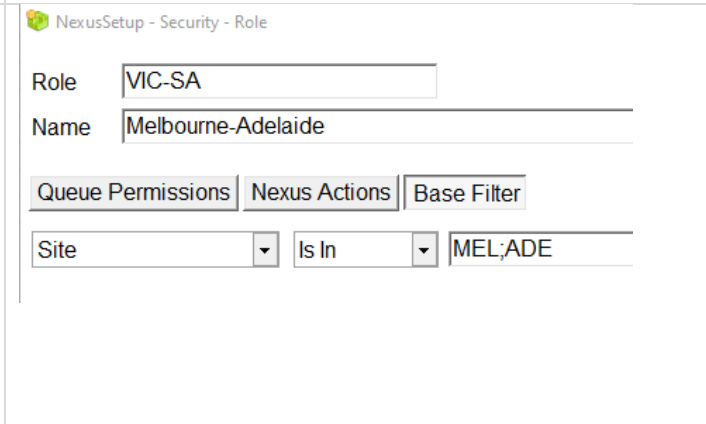
Advancing Workflow model by adding responsive filters to Transaction Type, Status and Holds

Select allowable Statuses for each Transaction Type. (TxType) As illustrated below, when the user selects the TxType in the QBrowser, the Status control will populate the allowable statuses and upon selection, the Holds will reflect allowable user-defined Hold Reasons.
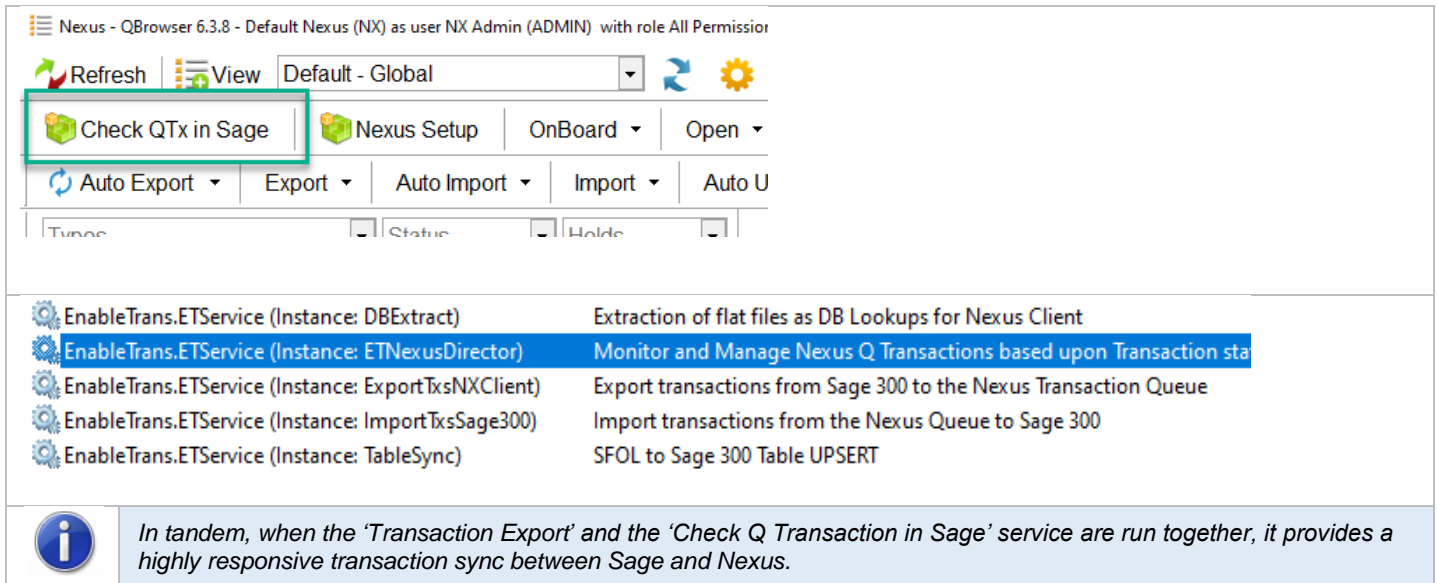
Extended Security Roles to better articulate user permissions and filters

Added 'Enable / Deny' access to Global Views, Archive and Nexus 'Check & Fix Queue' Utilities	Added 'Base Filter' - typically used to restrict user access to transactions for a given Site (Location Group)

Introduction of EnableTRANS-based 'Nexus Director'

The new '*EnableTRANS Nexus Director*' package offers a more articulated archiving and service-based evaluation of the transactions in the Nexus Q. Transaction Type specific Archival, Status Advancement and/or Deletion of the transaction from the QBrowser can occur if the transaction no longer meets the original export criteria, is complete, or deleted, etc.

The existing Nexus Director and the new EnableTRANS Director can co-exist if the existing archiving is sufficient but your implementation would like to engage the validation and auto archival/deletion of transactions that are no longer valid to pick / receive / fulfill.

> In tandem, when the 'Transaction Export' and the 'Check Q Transaction in Sage' service are run together, it provides a highly responsive transaction sync between Sage and Nexus.

Tighter integration & error reporting between Nexus Host Interfaces & EnableTRANS Packages

As EnableTRANS becomes a more integral component, the level of error-checking on that integration has been increased to alert where network paths, shares, access permissions may have been modified and block execution.
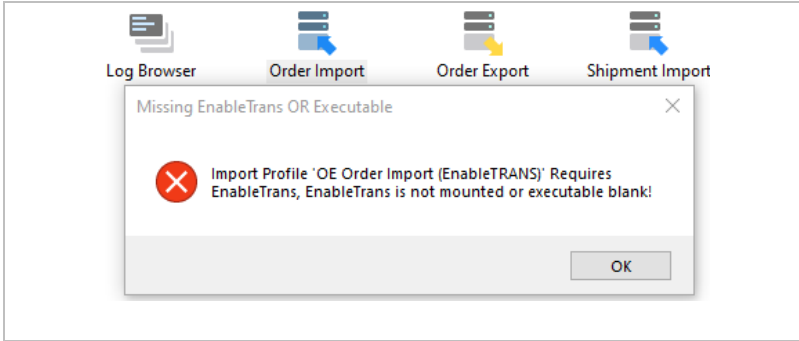
Error checks are now in place to ensure the Host Interfaces can link to Nexus, EnableTRANS, the declared EnableTRANS Package and the selected Package Instance.

Color matching for multi-Sage Companies, multi-Nexus implementations
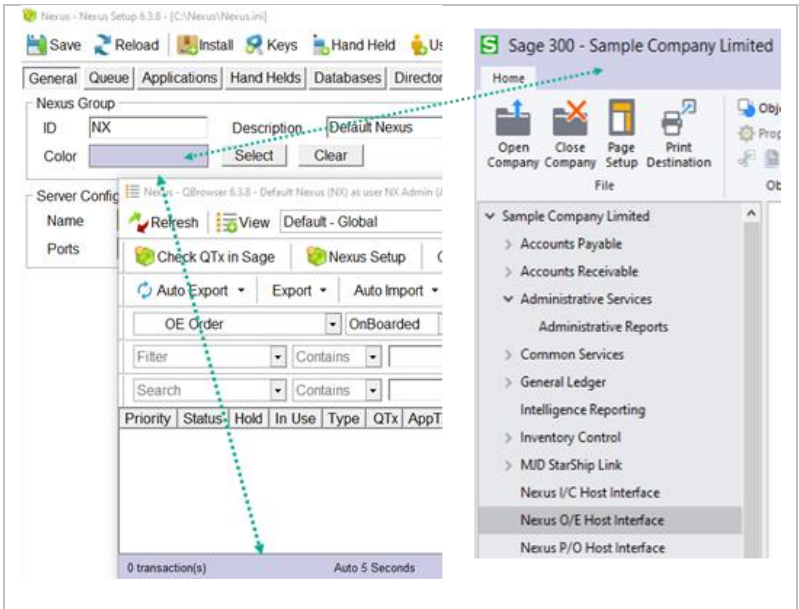
Sage 300 allows for color coding the UI to better identify different Companies. Likewise, Nexus now allows setting the QBrowser task bar color to match the Sage company color.

This is very helpful in multi-company Nexus implementations now that the QBrowser is typically launched from within Sage 300 desktop and carries the Sage session.

Field renaming per Nexus Q View
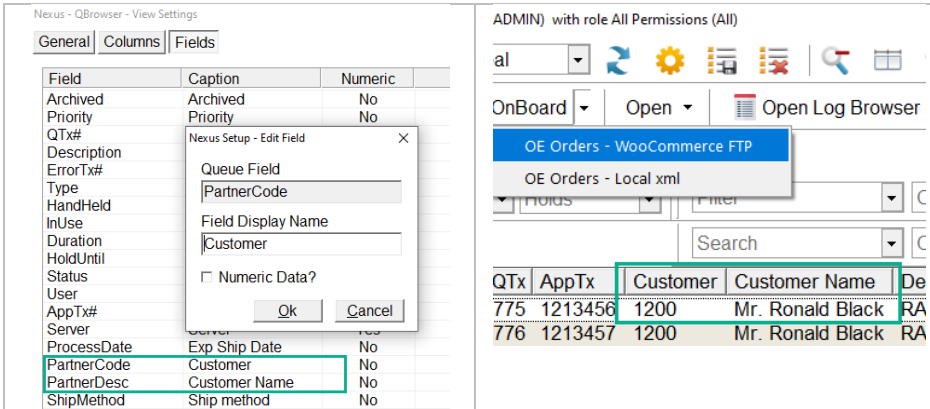
The Nexus Queue columns can be renamed in each View. When combined with enabling specific Statuses and Holds per Transaction type, the QViews can become very tailored to the transaction workflow.

Sage 2017-2021 PU2 (6.4A-6.8A) Compatible Releases

- *Nexus Services (NX) 6.4A R14*

- *Nexus Host Interface I/C (PH) 6.4A R22*

- *Nexus Host Interface O/E (OQ) 6.4A R20*

- *Nexus Host Interface P/O (PQ) 6.4A R21*

⚠️ *If upgrading Nexus Services from 6.4A R7 or earlier, this upgrade requires the deletion of all existing Nexus Logs, by deactivating prior to upgrade, uninstalling the existing installed Nexus Services and subsequent reinstallation and activation of the latest Nexus Services. (When logging in as ADMIN, Nexus Services will offer a Deactivate button.)*

Host Interface Export - Panel Result Messages – Tuning

To support networks with high latency, Host Interface Profiles now offer 2 additional, optional settings that assist receiving result and error messages from the execution of EnableTRANS workflows, back to the Sage 300 UIs. These settings are commented out within the profiles by default, and can be adjusted by editing the Export Profile.

Profile Syntax

```
[EnableTrans]
*
package=Sage300OEOrderExport
debug=%DebugEnableTrans%
level=%LogLevelEnableTrans%
*waitForIdle=50
*pollInterval=5
```

Export / Email workflows communicate progress, results and errors back to the Host Interface Export results panel.

** If any clients report missing data in the results panels, or, the results do not appear, please reach out to Enablecore support for assistance in setting these options as they may need slight adjustment due to your network speed and pathing.

Tighter Integration between Host Interface Options and EnableTRANS

Profile Syntax	Each EnableTRANS-based Profile has a silent link to the EnableTRANS Workflow Package. This linkage allows for auto population of the available package instances that can be chosen in the Profile Options. Any workflow can have any number of instances, each housing a unique set of execution parameters.
[EnableTrans] * package=Sage300OEOrderExport	
	** The identification of the package and instance increase the level of error checking between the Nexus Host Interface Profile and the EnableTRANS package.

Host Interface Options: Larger panels to accommodate more options and for readability

The width of the Host Interface Options panels has increased to accommodate the maturation, increased options and parameters in EnableTRANS packages.

Nexus Host *(Nexus Setup, QBrowser, Director & FTP Updater)*

Optimizations & Bug Fixes: (Nexus Host 6.3.0 – 6.3.9)
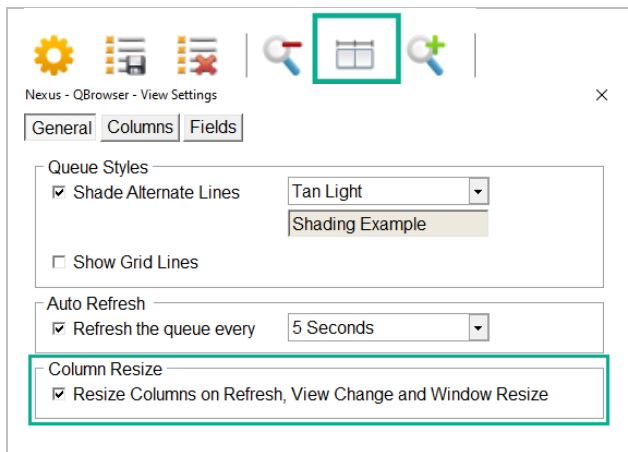
QBrowser Toolbars by default are set to Auto Arrange

'Auto Arrange ensures that the toolbars are most responsive to QBrowser resizing. Users can optionally turn this off to position the toolbars to their specific preference.

Auto Resize QBrowser Columns now part of Q Views
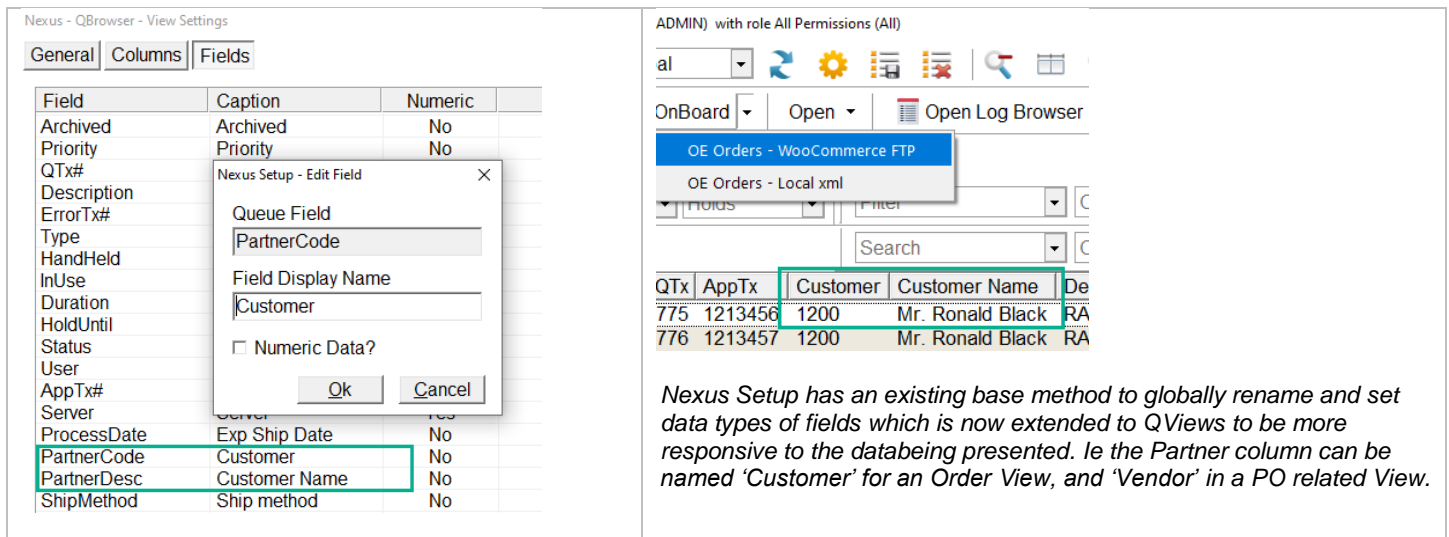
The standard QBrowser Toolbar has an icon that will resize the columns to best fit displayed data.

This resize action is now by default a feature of the QView.

From within the QView, the user can opt to turn this setting off, if they wish to hard set the column width, or trigger the resize manually.

Ability to rename the QBrowser Columns to match content in View

Nexus Setup has an existing base method to globally rename and set data types of fields which is now extended to QViews to be more responsive to the databeing presented. Ie the Partner column can be named 'Customer' for an Order View, and 'Vendor' in a PO related View.

Advanced Nexus Setup Permissions to Edit/Delete QViews, Archive and Fix Queue.

As Nexus is used for more extended workflows, ie Syncs, OnBoarding, Emails, etc, the Security model and managing Action permissions has become a greater concern.

Now user access to Transaction Types, Actions, Views, etc cultivate a significantly more controlled UI.

Exposed Trim Elements and Trimmed Tag to Nexus INI for Modification

The underlying Queue Transactions are payload files, stored in the Nexus 'Q' and 'A' Archive folders. Nexus Setup advises on the 'Maximum Queue File Length', which may need to be modified slightly any time the Nexus install path is changed.

When Transactions are inserted into the Nexus Transaction Queue, or moved to the Archive, the underlying files often need to be trimmed in length to accommodate the declared Max Queue File Length.

The most recent advancement is that the Nexus Setup now has 2 silent (not exposed in the Nexus Setup UI) settings.

trimElements 'Which columns to trim, and in which order'

trimTag 'What character to illustrate to the user that the Q Column has been trimmed.

The settings to the left are default.

Adjusted QBrowser Title Bar to better announce the current log in context

Added Color selection in Nexus Setup to identify the Nexus Group. Color appears on the bottom task bar of the QBrowser, visually linking the QBrowser to the specific Sage 300 Company.
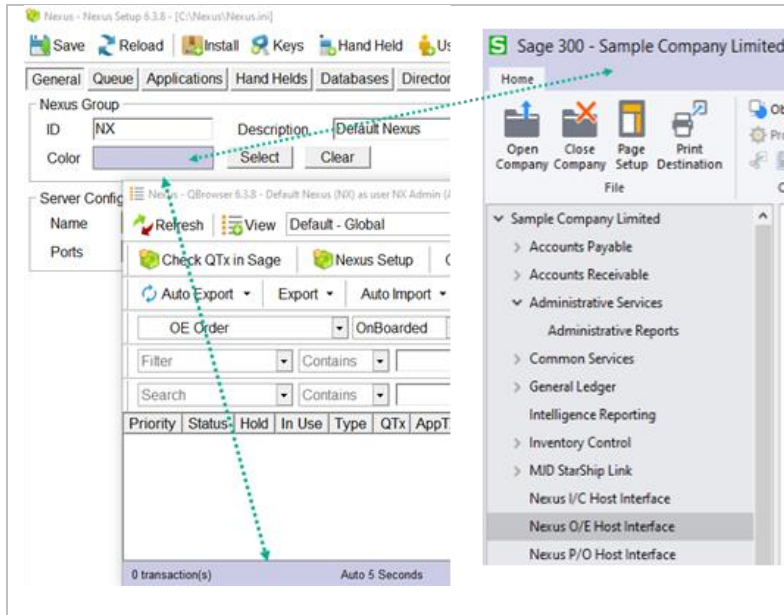
Sage 300 allows for color coding the UI to better identify different companies. Likewise, Nexus now allows for tailoring the QBrowser task bar color to match the Sage company color.

This is very helpful in multi-company Nexus implementations now that the QBrowser is typically launched from within Sage 300 desktop and carries the Sage session.

Small improvements in the progress bar and the resize anchor in the QBrowser have been made to better accommodate the colored taskbar.

Added workflow intelligence by enabling allowable 'Valid Statuses for a given Transaction Type'.
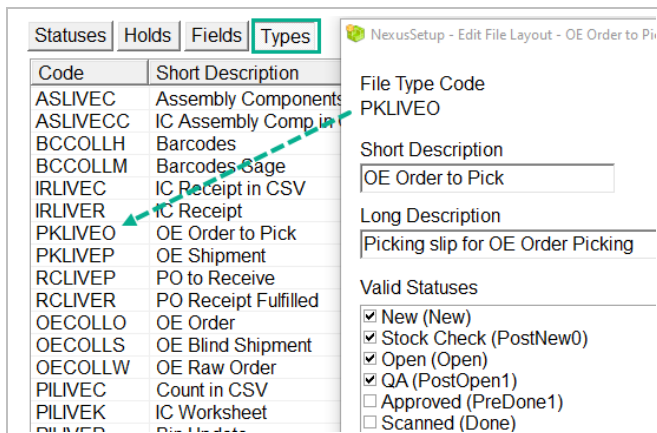
Select allowable Statuses for each Transaction Type.

As illustrated below, when the user selects the Tx Type in the QBrowser, the Status control will populate the allowable statuses and upon selection, the Holds will reflect allowable user-defined Hold Reasons using existing functionality.
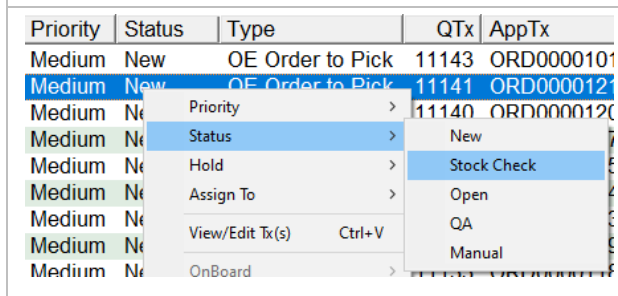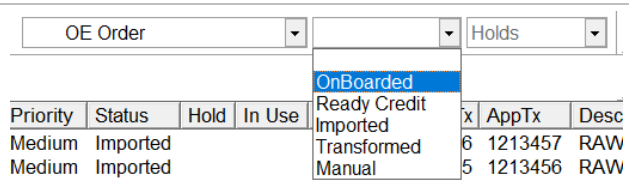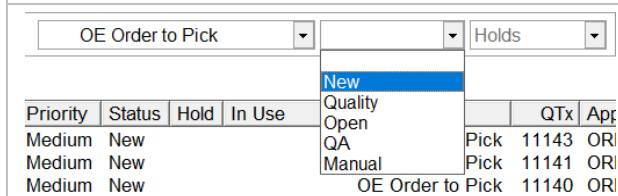
Statuses that are not valid, are now hidden in the drop-down filter control on the QBrowser toolbar and from the transaction-specific right-click menu.
In combination, these new workflow filters, Login Security, per-user Views and Base Filters, ensures that the task workflow becomes highly responsive and matches the users responsibilities.

Feature Summary of Nexus Client and Portable Apps

Major optimization to Syncing of Global and Device-Specific application settings.

Application Settings can be saved as Global or Device-specific.

The presence of Global vs Device-specific app settings requires additional levels of sync intelligence to ensure a device gets the correct settings for each application.

Addition of Panels for Item / Barcode

To better articulate manual entry and selection of Items vs Barcodes, separate lookup panels were provided.

Each panel has its own error messages and can be selected by clicking on the 'panel-switch' icon.

Rework of Assemblies Portable App to support Components Picking

The Assemblies Portable App can now not only show the included component items, but optionally allows for picking of the component items.

This as well as the import of the resultant Assembly is also supported by a new EnableTRANS-based Assembly Import to specifically support import of Serials / Lots collected on Component Items.

Addition of Panels for Detail Comments / Instructions

By enabling Detail Comments in the Order Export, the Detail Comments panel will be populated and available in the Picking Portable App.

Optionally, the Detail Comment popup can be setup to appear first, ensuring user acknowledgement of the comment / instruction.

In this example the user would see the detail comments first and must click on the panel-switch icon to be able to enter the Qty, and/or see the additional fields on the Qty panel.

By forcing the click on the panel-switch, the user acknowledges the comments / instructions.

** Comments / Instructions are available in OE Picking, PO Receiving and IC Transfers Fulfill

Availability of Location Details Panel

The addition of a popup panel to display the Location Details inventory buckets will require an enhancement of the Nexus DB Extract workflow if used in a Collect Portable App, and/or the Export Template in any Fulfill Portable App.

These are available in several Portable Apps and will be rolled out upon client request.

** Because of the update cycle of the data, the inclusion of this data benefits from the DB Extract and any transaction export running as a service with timely refreshes.

EnableTRANS 0.7.0.9 – Introduction

EnableTRANS is Enablecore's Application Automation Framework for ETL (Extract, Transform, Load) and Workflow Execution and is the underlying engine for all automated processing within our 'go-forward' solutions and custom development projects.

While EnableTRANS is a standalone software framework, and can provide for any traditional ETL function, it also offers a high degree of integration with both Nexus and Sage 300.

EnableTRANS does not offer a design UI but is provided as pre-built automations containing highly customizable settings files and intended to be mounted in Sage, Nexus and/or Windows Services.

Most existing Nexus Clients will have EnableTRANS already installed into their Nexus environment, providing some of the following typical features:

- Extraction of filtered Sage 300 tables to provide for Lookup Databases for Nexus Client Portable Apps.

- Syncing data between External Systems & Sage 300.

- On-boarding of CSV / TSV / XML Files to create Nexus Queue Transactions for Import to Sage 300 or SQL.

- Off-boarding and templating of Sage 300 transactions to local network or EDI/Ecommerce/Partners.

- Merge of Physical Inventory Counts to provide for better import management and duplicate SN/LT checking.

- Merge of PO Receipts to provide for Import of multi-PO Receipts for better application of additional charges.

- Automated print of barcoded labels & Custom reporting, etc.

EnableTRANS – Technical Summary

EnableTRANS is a .NET C# script framework and uses highly declarative assets to achieve workflow automations. EnableTRANS caches dynamically compiled 'workflow packages' which provide the speed of compiled programs and the declarative flexibility of scripts.

EnableTRANS core functionality covers SQL Adaptors for extraction, insert & update, read/write of flat and XML files, expression-driven data transformation, automated report & label generation and delivery, and provides for broad interjection of client-driven customizations, complimented with logging and fluent-schedule based service execution.

EnableTRANS is natively Nexus 'aware' and offers an optional 'Sage 300 Adaptor' for Sage 300 UI Automation, and both traditional COM and .NET Sage 300 SDK integration.

Any customizations delivered via the EnableTRANS framework leverage common pre-built adaptors, execution, logging, and scheduling components to rapidly provision a solution with advanced functionality.

> EnableTRANS is supplied as a no-cost component of the Nexus Data Collection Suite. Clients can purchase additional EnableTRANS-based packages to further automate their Nexus and/or Sage 300 environments.
>
> We welcome your inquiries on any other integration, data transformation or managed file exchange projects.

EnableTRANS – Sage 300 Integration

EnableTRANS Integration with the Nexus Host Interfaces

The Nexus Host Interfaces have integrated EnableTRANS as a supported Export / Import engine, replacing the legacy Sage SDK UI based Export / Imports. Users can still use the familiar Nexus Host Interface Export/Import panels, but the execution occurs external to Sage.

EnableTRANS-based Nexus Exports & Imports are highly declarative and customizable automations and have been introduced as Nexus add-ons allowing for;

- accommodation for larger operations with larger databases to minimize system impacts during exports,
- more detailed filters and expressions during transaction export,
- workflows running in automated service mode, and additionally, as custom data exchange between Sage 300 and external applications/databases and partners, and,
- relieve users of the manual requirement to manage or curate transaction export and / or import.

EnableTRANS - 'Sage300 Adaptor' & Generic Version Support

The EnableTRANS framework allows for 'Adaptors' to be installed to provide for program & execution integration. In the case of Sage 300 'Classic Desktop' installations, the Sage300Adaptor provides for UI & Session integration.

The latest release of the EnableTRANS '*Sage 300 Adaptor*' provides for a dynamic load of the Sage 300 versions 2017-2021, a more stable component and integration experience.

Examples of the Sage300 Adaptor in action

Any time an EnableTRANS automation or Nexus Action needs external access to the Sage 300 Desktop UI, Session, View Business Layer, or Report, EnableTRANS leverages its Sage 300 Adaptor.

The EnableTRANS Sage300 Adaptor used to Open a Sage 300 UI from the Q Browser or Nexus Log Browser.

EnableTRANS running a Sage 300 Report externally from the QBrowser

InReview		PO to Receive	7546621	P
Ope		OE Order to Pick	7546620	O
Ope	Priority >	)E Order to Pick	7546619	O
Ope	Status >	)E Order to Pick	7546618	O
Ope	Hold >	)E Order to Pick	7546617	O
Ope	Assign To >	)E Order to Pick	7546616	O
Sca		)E Shipment	7546611	O
Imp	View/Edit Tx(s) Ctrl+V	)E Order	7546610	O
Sca	Send Transfer to 3PL	)E Blind Shipment	7546609	O
New				
Imp	Print >	OE Confirmation Slip		
Sca	Merge Count QTxs	OE Picking Slip		
Sca	Open >	Invoice Count	7546605	P

Order Confirmation

Sample Company Limited
123 Sample Company Plaza
Any City, Any Province V6J 9T3
Canada
Phone: (123) 456-7890
Fax: (123) 456-7891

Sold To:
Mr. Ronald Black
2820 Wabash Road
Los Angeles, CA 90048
USA

Ship To:
Home office
12 Elegant Drive
Los Angeles, CA 90055
USA

Reference	PO Number	Customer No. 1200	Salesperson BB

Qty. Ord	Qty. Shp.	Qty. B/O	Item Number	Description
2	0	2	A1-1030	Fluorescent Desk Lamp

EnableTRANS Workflow Service initiating a Sage Session to update the Nexus Log to Log Email, DataSync or Export

EnableTRANS Supervisor (Instance: Supervisor)		Automatic
EnableTrans.ETService (Instance: EmailTxs)	Running	Automatic
EnableTrans.ETService (Instance: ExportTxsFileStore)	Running	Automatic
EnableTrans.ETService (Instance: ExportTxsFileStoreFTP)		Automatic
EnableTrans.ETService (Instance: ExportTxsNXClient)	Running	Automatic

Sat 18/07/2020 4:48 PM

Enablecore Test <Invoices@enablecore.
Your Enablecore Invoice # INV0000076

To   Mr. Ronald Black
Cc   Enablecore Admin

PDF   Invoice_INV0000076.pdf
      48 KB

Hello Mr. Black,

Thank you, your order has been shipped. Please see the attached invoice.

Order   **ORD000000000083**
Invoice **INV0000076**

Item	Description	Qty	Unit
A1-400/0	Desk Note Book	2	Ea.

A Workflow Package can engage the Sage 'Views' (Business Layer) to access calcuated fields, not available in SQL.

```
<ForEachRow table="Header" filter="">
  <OnEach>
    <If isTrue="Option.OEPayments">
    <UpdateMeter message="METER:Decorating {Header.InvoiceNumber} Payments ..."/>

    <SetView viewField="OEINVH.INVUNIQ" fromDSField="Header.InvoiceUnique" verify="false"/>
    <IfRead view="OEINVH">
      <Then>
        <NewRow table="Payment" add="true" asVariable="Row">
          <SetRowField row="Row" field="InvoiceUnique" fromText="{OEINVH.INVUNIQ}"/>
          <SetRowField row="Row" field="InvoiceNumber" fromText="{OEINVH.INVNUMBER}"/>
          <SetRowField row="Row" field="OrderPaymentTotal" fromText="{OEINVH.ORDPAYTOT}"/>
          <SetRowField row="Row" field="ShipmentPaymentTotal" fromText="{OEINVH.SHIPAYTOT}"/>
          <SetRowField row="Row" field="InvoicePaymentTotal" fromText="{OEINVH.INVPAYMENT}"/>
          <SetRowField row="Row" field="InvoiceAmountDue" fromText="{OEINVH.INVDUE}"/>
          <SetRowField row="Row" field="PaymentDiscount" fromText="{OEINVH.INVPAYDISC}"/>
        </NewRow>
      </Then>
      <Else>
        <UpdateMeter message="RESULT:Skip|{Header.InvoiceNumber}||Error getting invoice paymer
        <Log level="Warning" message="Error getting invoice payment totals, cancelling job"/>
```

EnableTRANS Execution

Windows Service

The expected default execution method for any EnableTRANS-based Workflow Package would be primarily via a Windows Service, where a continuous automation is useful.

QBrowser Nexus Action

Package execution can also be executed from the QBrowser as a Nexus Action, typically mounted as a toolbar button.

Some actions may be mounted as a Transaction-specific action and available from a right-click menu selection on the highlighted transaction(s).

Host Interface Interactive Export / Import

For a more user-controlled execution, the user may also engage a workflow package from the Export / Import Host Interface panels. In the case of Exports, the users will have access to criteria that they may want to adjust per execution.

Execution Methods are not mutually exclusive, ie; while there may be a Windows Service retrieving Orders from an Ecommerce site hourly, a user could also trigger an on-demand retrieval from a Nexus Action in the QBrowser at any time.

EnableTRANS – Available Workflow Packages

Emailers

Action	Transaction	'Traditional'	'EnableTRANS'
Email	PO: Purchase Order	n/a	Y (in progress)
Email	OE: Order	n/a	Y
Email	OE: Shipment	n/a	Y
Email	OE: Invoice	n/a	Y

Exports & Imports

Direction	Transaction	'Traditional'	'EnableTRANS'
Import	PO: Requisition		Y
Import	PO: Purchase Order	Y	Y
Export	PO: Purchase Order	Y	Y
Import	PO: Return	Y	Y (new)
Import	PO: Receipt	Y	Y
Export	PO: Receipt	Y	
Import	PO: Return	Y	
Import	IC: Worksheet	Y	Y (in progress)
Import	IC: Assemblies	Y	Y (new)
Import	IC: Adjustments, Material Usage	Y	
Import	IC: Receipts, Shipments	Y	
Export	IC: Transfers	Y	Y
Import	IC: Transfers Collect, Transfers Fulfilment	Y	Y
Import	OE: Order	Y	Y
Import	OE: Shipment	Y	Y (new)
Export	OE: Invoice	Y	Y
Import	OE: Invoice	Y	
Import	OE: Credit Import	Y	

Available EnableTRANS Email / Export & Import Packages will continue to expand, per client and project demand.

Custom Workflow Examples

Action	Transaction
Export / Transfer	IC / AR: Lookup Tables for use in 3rd Party iPAD Ordering Solution
Export / Sync	IC / Content Repository: Sync Images to CMS for filtered Items
Sync	IC: Sync Item Barcodes and Units from external Manufacturing System to Sage 300 IC
Print	SQL / HP SDK: 'Direct' Print of Pallet Labels from Manufacturing Sys as Service (No Windows Spool)

Upgraded EnableTRANS-based Workflows

On-Boarding & Importing Sage 300 Transactions from External File Source

An increasing number of projects are leveraging EnableTRANS capabilities to automate file-based transaction exchanges between disparate systems and channel partners, such as Ecommerce, EDI, Mobile Ordering solutions & 3PL Partners.

As a transactional workflow system, complete with Sage 300 Host Interfaces for Exports & Imports, Nexus allows for the source or target transactions to extend beyond its traditional handheld 'portable applications'.

Retrieve RAW transaction payload / file from local network or remote FTP(S) site (Service or Manual)

On-Boarding is the workflow that retrieves the raw transaction file from a local network or remote ftp file source.

EnableTRANS retains encrypted end-points to house credentials.

Like all EnableTRANS workflows, the On-Boarding workflow can be initiated from either a Windows Service running on a schedule, and/or manually triggered from a Nexus Action.

On-Boarding identifies and navigates remote folders via 'Store Protocols' which also express whether to archive or delete at source. Once retrieved, the on-boarded raw file is archived locally as well.

All workflows can have any number of 'instances' that carry different sets of parameters. When exposed as a 'Nexus Action' in the QBrowser, the Nexus Security model allows to restrict the action to a user or group of users, and name each Action separately, based upon its unique intent.

When retrieved into the Nexus Transaction Queue, the inbound raw transactions are reviewed for duplicates and if found, placed on Hold with an 'Error' reason code.

The On-Boarding workflow has steps to split the raw file payload into individual transactions, validate, augment data from lookups, and finally template child transactions, ready for import.

The illustrated example on the left has generated 2 Orders from the raw inbound flat TSV file.

During the On-Boarding, there are 'Decorator' steps that transform, validate and augment the original 'raw' transaction, logging each and potentially emailing errors. Below are some of the more common examples of the script-based transformations.

Code	Description
```xml\n<ForEachRow table="Detail" filter="[TxNo] = {Header.TxNo}" asVariable="Det\n <OnEach>\n <If isTrue="Option.TranslateCustomerItem">\n <ValidateDefault table="Detail"\n dbCommand="ICITMC">\n <Defaults>\n <Default from="ItemNo" to="ItemNo"/>\n </Defaults>\n <OnFailure>\n <SetError table="Detail"\n fromText="No translation for Customer '{Detail.Custome\n <Log level="Warning" message="Order '{DocNumber}': No translatio\n parameters="{Header.DocNumber};{Detail.CustomerCode};{Detai\n```	***Translation****: of Customer / Vendor / Manufacturers Item Number to I/C Item Number with Unit & Unit Conversion Factor.*
```xml\n<If isTrue="Option.ValidateICITEM">\n <ValidateDefault table="Detail"\n dbCommand="ICITEM">\n <Defaults>\n <Default from="FmtItemNo" to="FmtItemNo"/>\n <Default from="Description" to="Description"/>\n <Default from="StockUnit" to="OrdUnit"/>\n <Default from="InActive" to="InActive"/>\n </Defaults>\n <OnFailure>\n <SetError table="Detail" field="ItemNo"\n fromText="Order '{DocNumber}': Item '{Detail.ItemNo}' not foun\n <Log level="Warning" message="Order '{DocNumber}': Item '{ItemNo}' not f\n parameters="{Header.DocNumber};{Detail.ItemNo}"/>\n </OnFailure>\n <OnSuccess>\n <If isTrue="Detail.InActive">\n <SetError table="Detail" field="InActive"\n fromText="Order '{DocNumber}': Item '{Detail.ItemNo}' is InA\n <Log level="Warning" message="Order '{DocNumber}': Item '{FmtItemNo}'\n parameters="{Header.DocNumber};{Detail.FmtItemNo}"/>\n```	***Validate****: translated I/C Item, and retrieve other defaulted fields from that validated record.* *Check if I/C Item is active, and similarity validate if I/C Item is active for a given location.*
```xml\n<ForEachRow table="Detail" filter="[TxNo] = {Header.TxNo}" asVariable="D\n <OnEach>\n <If expression='DetailRow["OrdUnit"].ToString().Equals("LB")'>\n <SetRowField row="DetailRow" field="OrdUnit" fromText="KG"/>\n </If>\n <If expression='DetailRow["OrdUnit"].ToString().Equals("CA")'>\n <SetRowField row="DetailRow" field="OrdUnit" fromText="CS"/>\n </If>\n```	***Expressions:*** *can be used to evaluate and permit progress of the workflow, and/or as a test to set certain data fields.*
```xml\n<If expression="Primary.HasErrors">\n <ForEachRow table="Header">\n <OnEach>\n <SetRowField table="Header" field="BatchErrors" fromText="tru\n </OnEach>\n </ForEachRow>\n```	***Success & Errors:*** *As the script is executed, success and error messages are collected to the log and a batch evaluation is conducted to know if the overall script is successful.*

Status	Hold	Type	QTx	Description
OnBoarded		OE Order	11158	RAWOrderTSVFlat12345-1213456
OnBoarded	Error	OE Order	11159	RAWOrderTSVFlat12345-1213457
Transformed		OE Raw Order	11147	RAWOrderTSVFlat12345

Error Marking*: If there are errors, the Transaction is marked in Error in the QBrowser, and notify, if the log is setup to send an email notification.*

On-Boarding Transaction to Import

Import Options: *Each import will have a series of Options that govern the EnableTRANS-based import workflow.*

- *What Transaction (Tx) Type in Queue to import?*
- *What Tx Type in Queue to set after import?*
- *Use Sage 300 or Source Transaction #?*
- *Deposit Source Transaction # or other into Ref?*
- *Manual and Auto Processing Action Save | Post?*
- *Use Session or System Date for Save | Post?*
- *Insert to Nexus Log as Reviewed?*
- *Print a report upon Import?*
- *Repeat attempt to Save | Post? # of retries?*
- *Credit Override Credentials?*
- *Log Level to report?*
- *EnableTRANS workflow instance to use?*

Any number of customizations can be made to these options or the underlying EnableTRANS Instance.

Import Execution: *Any part of the On-Boarding and subsequent Import workflow can be automated, either completely or partially to achieve your organizations best operational workflow.*

Using the service schedule, the automation may also be restricted to only running during certain hours, and/or only on certain days.

You may prefer to run the On-Boarding as a service, but manually trigger the import as a batch, or individually.

Import Logging

All Imports to Sage 300 are logged into the Nexus Log. Other workflows such as Exports, Emails or Syncs can optionally be logged. The Log will advise whether the workflow was successful or resulted in Errors / Warnings. The Nexus Log is highly useful where transactions are automatically On-Boarded and Imported and users leverage the 'Reviewed' flag.

Reviewed	Processed	Log Date	Log Time	Q Type	AppTx	Method	Action	Module	ERP Type	Document	Rev	QTx	Warn...	Errors	Criticals	User ID
No	Saved	7/27/2021	10:04:52	OE Order	1213456	Manual	Import	OE	ORDER	ORD0000122	0	11158	0	0	0	ADMIN
Auto	Sent	7/20/2021	16:51:54	ORDEML1	ORD0000114	Manual	Email	OE	ORDER	ORD0000114	0		0	0	0	ADMIN
Auto	No	7/20/2021	16:10:48	ORDEML1	ORD0000114	Test	Email	OE	ORDER	ORD0000114	0		0	0	0	ADMIN
Auto	Updated	7/13/2021	11:23:19			Auto	Sync	IC	ICIOTH		0		0	0	0	ADMIN
Auto	Updated	7/13/2021	11:23:18			Auto	Sync	IC	ICUNIT		0		0	0	0	ADMIN
No	No	7/12/2021	10:10:12	OE Shipm...	ORD0000112-1	Manual	Import					11107	2	0	0	ADMIN
No	No	7/12/2021	10:09:17	OE Shipm...	ORD0000112-1	Manual	Import					11107	2	0	0	ADMIN

EnableTRANS-based, Transactional Html-templated Emails

Since their initial introduction, *OE Order Confirmations, Shipment Notices,* and *Invoice Delivery* Email Exports have been significantly advanced to provide greater functionality, provide easier deployment and allow client customizations.

All Email workflows can optionally include a Sage Report PDF and transactional html content, and can be run from the Export panels in the Host Interfaces, from a Nexus Action button in the QBrowser, or as a Windows Service.

Broader support for source of Tracking Number(s)

All core OE transactions, (Orders / Shipments & Invoices), can house Tracking Numbers on the Header, Detail and in some cases the Misc Charge Comments.

All of these sources are now supported.

Streamlined Carrier lookups for building dynamic Carrier-specific Package Tracking URL

Emailer 'Options', provide a Sage optional field for use as a lookup between the Sage 300 Ship Via code and Carrier.

** While your Ship Via may express different classes of carrier service, the carrier tracking URL tends to be generic across service levels and the optional field lookup translation facilitates to flatten this relationship.

As illustrated below, the client can maintain what carriers are going to be used to produce a tracking link, and the Emailer package has an underlying URL template resource which can be augmented or customized for additional carriers.


```
<CarrierToUrlTemplate>
  <Carrier>FEDEX</Carrier>
  <TrackingURLTemplate>http://www.fedex.com/Tracking?track
</CarrierToUrlTemplate>
<CarrierToUrlTemplate>
  <Carrier>UPS</Carrier>
  <TrackingURLTemplate>http://wwwapps.ups.com/WebTracking/
</CarrierToUrlTemplate>
<CarrierToUrlTemplate>
  <Carrier>USPS</Carrier>
  <TrackingURLTemplate>https://tools.usps.com/go/TrackConf
</CarrierToUrlTemplate>
```

Optionally include Sales Reps, as 'Cc' or 'Bcc'

It's often desirable to include the Sales Rep(s) for OE-related transactional emails. EnableTRANS email workflows now support inclusion of either the first, or all Sales Reps on a specific transaction as a 'Cc' or 'Bcc'.

The Emailer Package can include the Sales Rep, and the Options provide for the identification of the Sage 300 Optional Field to be used for the Sales Reps email, as per below.

As Sage 300 does not provide for an email field for the Sales Rep, use of an optional table provides the email address for use in the email workflow.

Result Example:

Test mode for Emailer runs

Each Emailer Package provides a 'Production Mode' option that can restrict execution to 'Test Runs' only, or 'Production'.
When in Production mode, optional Test runs from the UI are still available, but execution is 'production' by default.

Each emailer package requires a 'TEST To Email Address' if operating in 'Test' mode.

D

dkellock@enablecore.com | support@enablecore.com

TEST Order ORD0000113

*** TEST DATA BLOCK ***

Subject: Order ORD0000113

Salutation: Mr. Black

Sender: dkellock@@enablecore.com

ReplyTo:

From: dkellock@@enablecore.com

To: 'Mr. Ronald Black' dkellock@enablecore.com

Bcc:

Cc:

*** TEST DATA BLOCK ***

PLEASE DO NOT REPLY TO THIS EMAIL – *We will not receive it.*

Hello Mr. Black,

By the time you receive this email, your order has already been proc

PO# 99987-01

Order# ORD0000113

Order Date Mar-07, 2021

When in 'Test' mode, the email will execute but redirect the email to the provided 'TEST To Email Address', and include a 'Test Data Block' that will confirm proper evaluation of intended recipients, subject, salutation, body data, etc.

Test runs will be logged but do not block subsequent production runs for the same transaction.

Processed	Log Date	Log Time	Q Type	AppTx	Method	Action	Module	ERP Type	Document
Sent	7/20/2021	16:12:23	ORDEML1	ORD0000114	Manual	Email	OE	ORDER	ORD0000114
No	7/20/2021	16:10:48	ORDEML1	ORD0000114	Test	Email	OE	ORDER	ORD0000114

Once in Production, the Test method can still be used from the Host Interface export panel to occasionally test before sending.

Order date from	/ /	TEST Export Results of OE Order Emailer (EnableTRANS)
Order Ship date to	/ /
Expected Ship date from	/ /
Expected Ship date to	/ /

| | 1 New | 0 Replaced | 0 Skipped | 1 Total |

Action	User?	App Tx	Q Tx	Comment
Created	No	ORD0000114		Email Test to support@enablecore.com

Export   Test

'Most' Header & Detail data is available via the SQL queries provided in the Emailer Package, and is extremely fast as the workflow is executed externally from Sage, even though you may have triggerred the emailer from the Host Interface.

In addition to SQL, emailers workflows have access to a transformation steps that can modify data based on rules or expressions, and/or augment data from other external sources.

Lastly, while most data is available via SQL, some calculated data is only or more readily available via the Sage 300 Views (Business Logic Layer) and the Transformation steps have the ability to query the Sage Views and augment specific View Field data.

Resulting Examples

Sat 18/07/2020 4:48 PM

Enablecore Test <Invoices@enablecore.

Your Enablecore Invoice # INV0000076

To   Mr. Ronald Black

Cc   Enablecore Admin

PDF Invoice_INV0000076.pdf
48 KB

Hello Mr. Black,

Thank you, your order has been shipped. Please see the attached invoice.

Order   **ORD000000000083**
Invoice **INV0000076**

Item	Description	Qty	Unit
A1-400/0	Desk Note Book	2	Ea.

Track Your Shipment by clicking on a tracking number below:

CROSS-COUNTRY TRUCKING LINES   123456789

Thank You! Enablecore Technologies Inc.

enable.core

 Reply   Reply All   Forward

D   dkellock@enablecore.com   support@enablecore.com
TEST Order ORD0000113

Sold To   **Ship To**

Mr. Ronald Black   Home office

2820 Wabash Road   12 Elegant Drive

Los Angeles, CA   Los Angeles, CA

USA 90048   USA 90055

Contact Mr. Black 2135550274

Item	Description	Qty Ord	Shipped	Outstanding	Unit	Price	Extd
A1-103/0	Fluorescent Desk Lamp	2	0	2	Ea.	$59.99	$119.98
A1-105/0	13W Mini Fluorescent Bulb	1	0	1	Ea.	$7.10	$7.10
						Sub Total	$127.08
						Total Sales Tax	$10.48
					STATE	$7.94	
					COUNTY	$2.54	
					Total Amount	$137.56