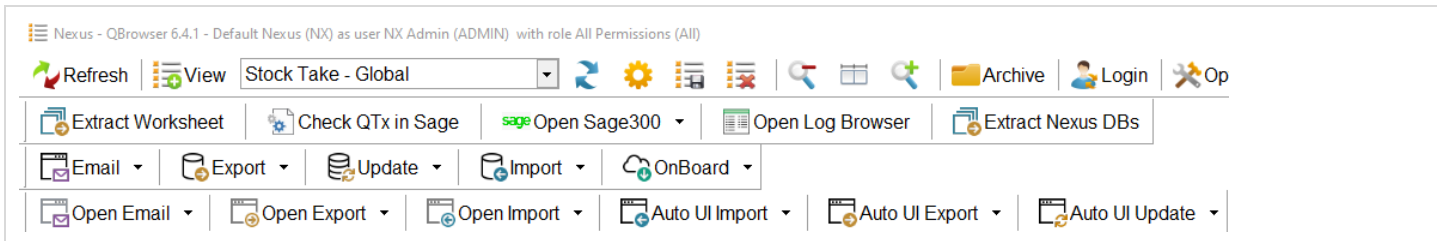


## Nexus 6.4.x Upgrade Summary

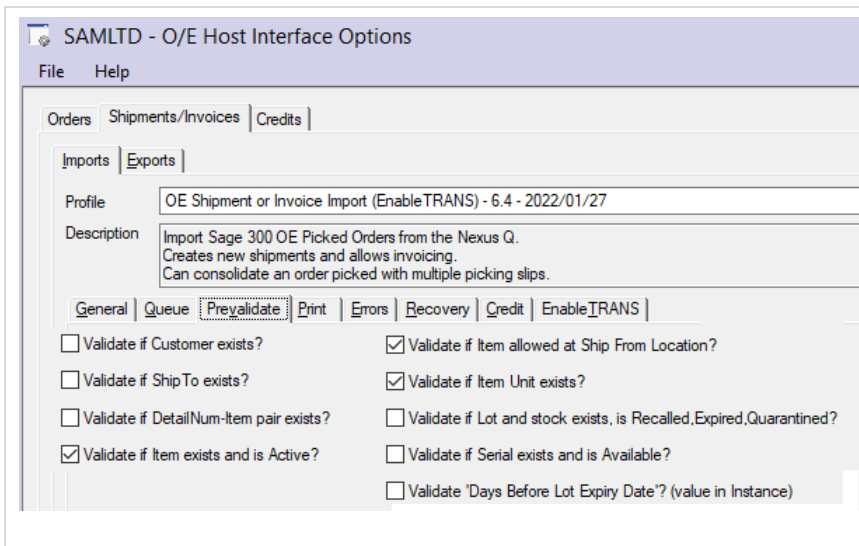
### Key Changes & Advancements:

#### Rewrite of Nexus Actions in QBrowser, transition Automated Exports/Imports to EnableTRANS –

All Nexus Actions have been rewritten to sport new icons, be logically grouped on a given Action Bar and leverage EnableTRANS for all automations vs the Host Interface Import / Export screens.



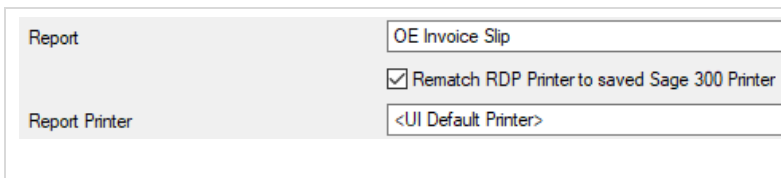
#### Import Pre-validation Workflow Step Added – all Import workflows now include a ‘Pre-validation’ step to provide error/warning alert before Save/Post Attempt.



Pre-validation occurs before any attempt to Save or Post to Sage 300, reducing system impacts and providing for more articulated and actionable error messages to users.

Each Import comes with a standard set of validation rules and allow for augmentation to include client-specific customizations in the EnableTRANS declarative script.

#### Major Advancement in Sage 300 Report Printing – Better print surety via EnableTRANS Sage300 Adaptor specifically when printing during automated import or from a QBrowser Nexus Action.



Nexus 6.4 adds the ability to harvest the user-saved printers across each Sage 300 screen, and offers a mechanism to match and use the correct local printer to an RDP redirected one.

#### Sage 300 v2022 Compatibility – Sage 300 compatibility is delivered as updated releases of the Nexus Services, Host Interface modules and EnableTRANS Sage 300 Adaptor.

## Physical Inventory Import transitioned to EnableTRANS, significant gains in Variance Reporting

Physical Inventory is one of the last large imports to be converted to EnableTRANS and takes full advantage of the Pre-validation step to isolate count & reconciliation issues before attempting imports to the I/C Worksheet. This rewrite should significantly reduce efforts to isolate and resolve inventory count reconciliations, especially for clients with Serial and Lot items.

Level	Stop ...	Stop ...	Message
Notice	None	None	Starting Validation Phase for PIMerged-2 : 2
Warning	None	None	Item 'A1-105/0' qty 2 Ea. will be updated on Worksheet as 'On Hold', status is 'Adjustment cost 0.00 <= 0'
Warning	None	None	Item 'A1-310/0' qty 3 Ea. will be updated on Worksheet as 'On Hold', status is 'Item on worksheet is InActive'



The Physical Inventory Counting workflow can be complimented with the 'On-Board Counts' package to bring in other Inventory Counts from Sales Reps, 3PL, Customers and import those as well.

## Transactional Emailers now support Sage 300 Multi-Contacts and include 'Execution Guards' -

Support for Sage 300 Multi-Contacts in addition to the existing Bill To / Ship To Email addresses, have been added to the Order, Shipment & Invoice transactional emails in addition to a number of guards to protect against errant email batches.

To Email Address Source? *	Customer Email - AR	Max Emails To Process per Batch (0 no max)	<input type="text" value="2"/>
Cc Email Address Source? *	Customer Email - AR	Cancel Batch if Emails Exceeds (0 no max)	<input type="text" value="5"/>
Static Cc Email Address(es)?	Customer Email - Order		
Static Bcc Email Address(es)?	Customer Contact Email - AR		
*TEST* To Email Address?	Customer Contact Email - Order		
	Customer Multi-Contact Email - OE		
	Ship To Email - AR		
	Ship To Email - Order		
	Ship To Contact Email - AR		
	Ship To Contact Email - Order		

**Incremental advancements in all EnableTRANS workflows** – As our clients increasingly leverage EnableTRANS to provision their Sage 300 and related integration workflows, we have enhanced all validation, results logging, printing and automation features to provide for a noticeably enhanced and streamlined workflow experience.

Export Results of OE Invoice Emler (EnableTRANS)

New     Replaced     Skipped     Total     Show All?

Action	User?	App Tx	Q Tx	Comment
Skipped	No	IN0000000082		Email already sent in Campaign EMLINV1 on 2022-Jan-05
Skipped	No	IN0000000081		Invoice 'IN0000000081' is earlier than minimum Post Date '2021-Dec-17'
No Txs	No			No matching Invoices to Email after filter



## Advanced Transit Transfers in Transfer Collect Portable App & Transfers Import

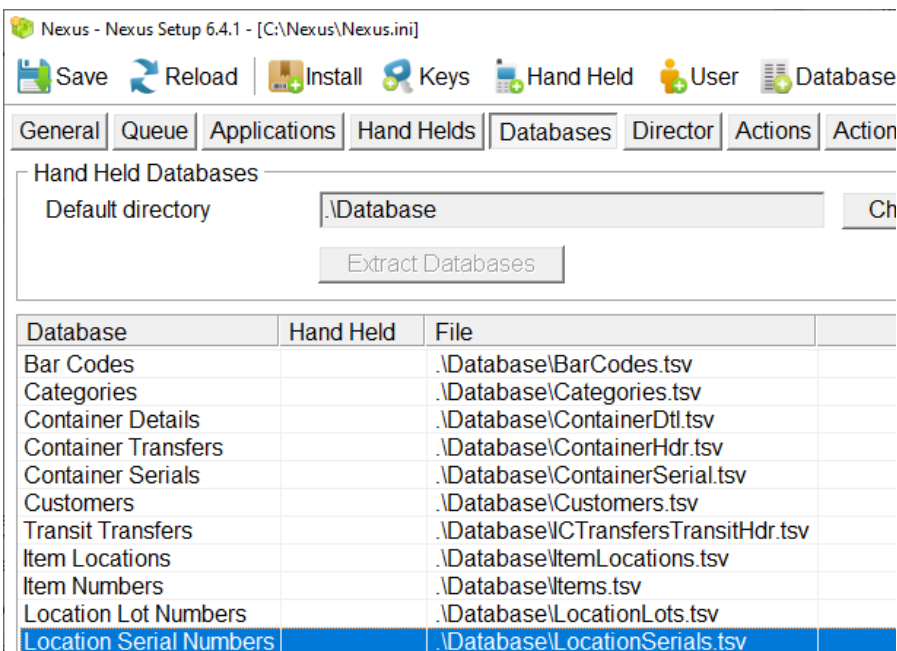
<b>TR00001221-1</b> <span style="float: right;">x</span> HDR HDR2 DTL DTLS TTLS Doc TR00001221-1 Type <b>Transit Receipt</b> Trnsf TRF000000004 Src 1 Central warehouse - Seattle GIT TRANS Goods in Transit Dest 2 Portland Office					<table border="1"> <thead> <tr> <th>Level</th> <th>Stop ...</th> <th>Stop ...</th> <th>Line</th> <th>field</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>Notice</td> <td>None</td> <td>None</td> <td>0</td> <td>0</td> <td>Receiving Transit Transfer 'TRF0000000006', validating.</td> </tr> <tr> <td>Error</td> <td>Manual</td> <td>Manual</td> <td>6</td> <td>2</td> <td>Collected item 'A11030' not found in Transit Transfer 'TRF0000000006'</td> </tr> <tr> <td>Error</td> <td>None</td> <td>Auto</td> <td>0</td> <td>0</td> <td>Under transferred item 'A1-320/0', received 1, expected is 2</td> </tr> <tr> <td>Warning</td> <td>Auto</td> <td>Auto</td> <td>0</td> <td>0</td> <td>Item 'A1-470/0' not found in collected receipt</td> </tr> </tbody> </table> <p>Transfers Collect now has dynamic panels that redraw depending on the Transfer type, and the its associated Import pre-validation step tests for a number of advanced errors, including items that were transferred but not received, and vice versa, items received but not transferred.</p>	Level	Stop ...	Stop ...	Line	field	Message	Notice	None	None	0	0	Receiving Transit Transfer 'TRF0000000006', validating.	Error	Manual	Manual	6	2	Collected item 'A11030' not found in Transit Transfer 'TRF0000000006'	Error	None	Auto	0	0	Under transferred item 'A1-320/0', received 1, expected is 2	Warning	Auto	Auto	0	0	Item 'A1-470/0' not found in collected receipt
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Error	None	Auto	0	0	Under transferred item 'A1-320/0', received 1, expected is 2																														
Warning	Auto	Auto	0	0	Item 'A1-470/0' not found in collected receipt																														

# Release Addendum – April 19, 2022

## Stock Transfers Portable App

- As a follow-on to support the use of the Stock Transfers Portable App for Transit Transfer Receipts with Serial & Lot, the Serial / Lot Lookups & Validation will dynamically adjust to reference the GIT Location. Regular Transit Transfers will continue to provide Serial / Lot Lookups and Validation from the Source Location.
- During scanning or manual entry, the Serial or Formatted Serial are both acceptable entries.

	If requiring Serial or Lot lookups and validation in any of the Collect Apps, including the Stock Transfer, you will need to include the LocationSerials amnd/or LocationLots databases in Nexus, as well as including these in the EnableTRANS 'SQLToFlatFiles' extraction package as illustrated below.
	Any Collect App can continue to scan and collect Serial and/or Lot without using the Lookups and Validation on the Nexus Client and defer to the validation occurring during import. This is a significantly leaner implementation and appropriate in situations where you produce/label serial & lots internally. In-app validation can be beneficial where your operations engage external contract manufacturing and/or redistribute products.



Database	Hand Held	File
Bar Codes		.\Database\BarCodes.tsv
Categories		.\Database\Categories.tsv
Container Details		.\Database\ContainerDtl.tsv
Container Transfers		.\Database\ContainerHdr.tsv
Container Serials		.\Database\ContainerSerial.tsv
Customers		.\Database\Customers.tsv
Transit Transfers		.\Database\CTransfersTransitHdr.tsv
Item Locations		.\Database\ItemLocations.tsv
Item Numbers		.\Database\Items.tsv
Location Lot Numbers		.\Database\LocationLots.tsv
Location Serial Numbers		.\Database\LocationSerials.tsv

```
<?xml:version="1.0" encoding="utf-8" ?>
<ETInstance>
  ..<Name>NexusDBExtract</Name>
  ..<Description>Extract lookup databases for use by Nexus Client</Description>
  ..<Version>1.7.3</Version>
  ..<Host>Console</Host>
  ..<Package>SqlToFlatFiles</Package>
  ..<Script>SqlToFlatFiles</Script>
  ..<LogLevel>Information</LogLevel>
  ..<Debug/>
  ..<Settings>
    ..<Globals>
      ..<Setting name="DBConnection">Sage300_SAMLTD</Setting>
      ..<Setting name="DatabaseSettings">NexusDatabases</Setting>
      ..<Setting name="Databases">
        APTerms;ARTerms;BarCodes;Categories;Customers;Items;ItemLocations;ItemUnits;Locations;LocationSerials;
        OEShipVia;POShipVia;ShipTos;Vendors</Setting>
      ..<Setting name="LastUsedDate">20180101</Setting>
    ..
  ..
</Settings>
</ETInstance>
```

## Transfers Fulfill Portable App

- Transfers Fulfill has been extended to better support usage for Transit Transfer Receipting.
- At time of Transfer Export, **Transfers to Pick** (Regular and Transit Transfers) vs **Transfers to Receive** have been separated as a different Transaction Types.

Priority	Status	Hold	In Use	Type	QTx	AppTx	Local
Medium	Open			Transfer to Pick	12333	TRF000000016	2
Medium	Open			Transfer to Pick	12334	TRF000000018	2
Medium	Open			Transfer to Pick	12345	TRF000000019	2
Medium	Open			Transfer to Receive	12346	TRF000000021	2

**IC Transfers Fulfill**

Tx# Formats Pages Pages 2 Start

Tx Number

Prefix: TR

Next: 1013

Digits: 8

Suffix: -1

Transaction Control

Allow Trnsf Receipt?

Consolidate Transfers?

If the Transfers Fulfill portable app is enabled to allow Receipting, 2 differentiated Start buttons are presented on the Nexus Client Start panel.

**Nexus Client**

Logout Start Tx Config

IC Transfer

IC Transfer to Pick

IC Transfer to Receive

Transfer to Pick	12345	TRF000000019	2	this is a test des
Transfer to Receive	12346	TRF000000021	2	test transit trans

Viewing Transfer to Receive TRF000000021

Close Edit Tx Add Note 4 of 4

AppTx **TRF000000021** Hold

Status **Open** In Use

Priority **Medium** HH

```

1: H,2,2,"TRF000000021","20220414","20220414","test transi
2: D,1,"0040","A11030",N,N,0.00,1.50,3,"Ea.",1,"Fluorescen
3: BC,"A1001","A11030","Ea.",1
4: BC,"MN000021","A11030","Ea.",1
5: IUM,"A11030","Case",24
6: IUM,"A11030","Crate",48
7: IUM,"A11030","Dozen",12
8: IUM,"A11030","Ea.",1
9: D,2,"0900","A1900B",Y,N,0.00,2.00,2,"Ea.",1,"Answering
10: IUM,"A1900B","Ea.",1
11: SERIAL,"A1900B","A1-900/B","April00116","April-00116"
12: SERIAL,"A1900B","A1-900/B","April00117","April-00117"

```

If Serial and/or Lots are enabled, the Serials / Lots (SN/LT) exported in each Transfer Transaction Type are differentiated;

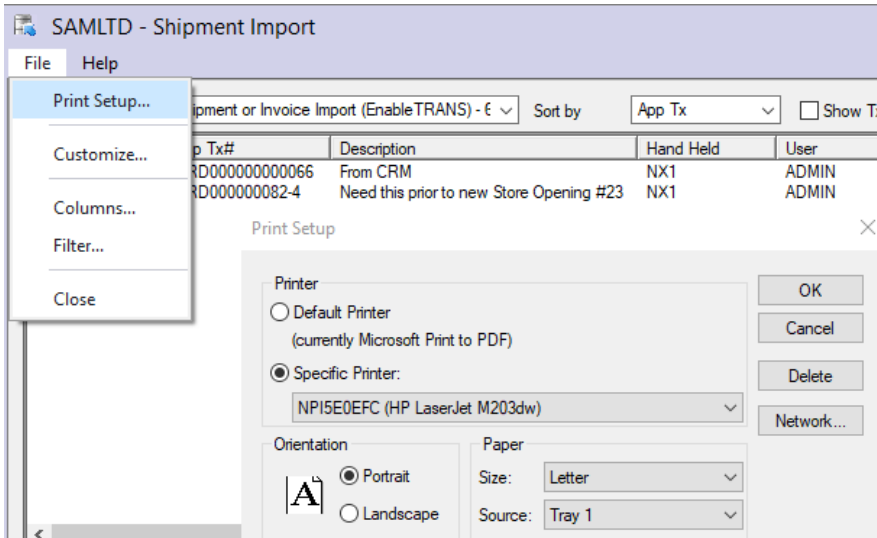
- Transfers to Pick will include SN/LT available within the Source Loc
- Transfers to Receive will include SN/LT from the GIT Location

# EnableTRANS Sage 300 Adaptor

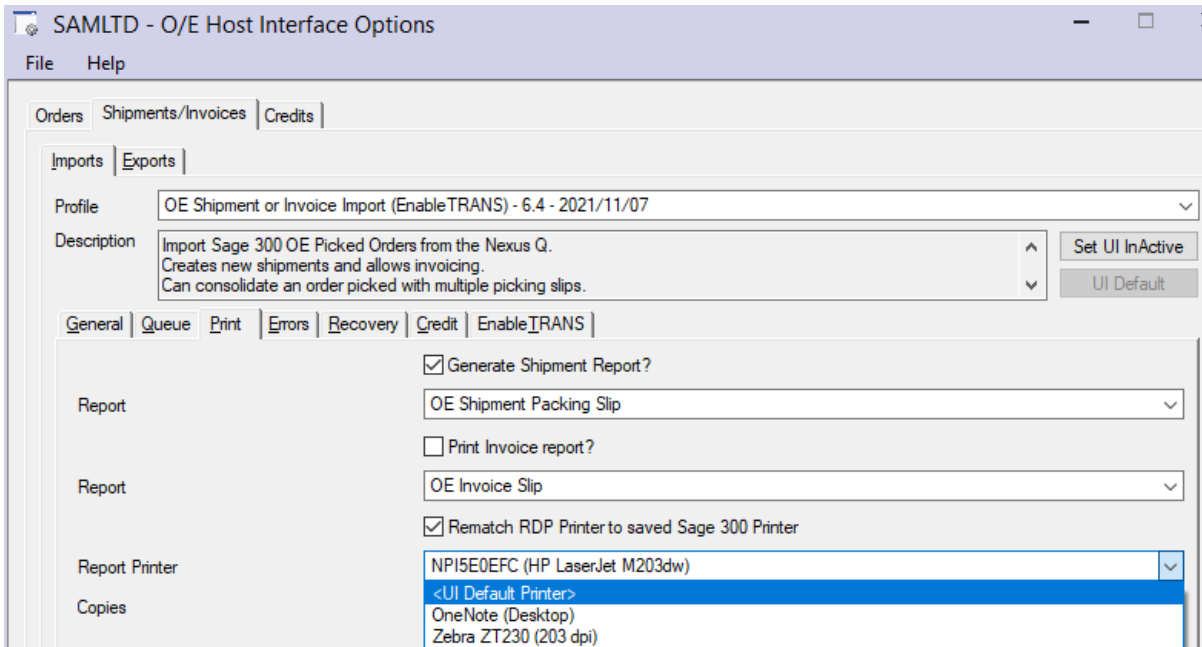
## Major rewrite of EnableTRANS-based Sage 300 report printing

### Harvest user-specific Print Setup settings

All Host Interface Export & Import screens now have Print Setup panels to allow Sage users to save their print settings. Import Print Setup panels had previously been available and have now added the same to both.



In each Export/Import profile you can select a specific printer, or indicate to harvest the user-specific saved Print Setup settings. If 'UI Default Printer' is selected, a EnableTRANS workflow 'print step', can reach into the print setup for that users specific screen.

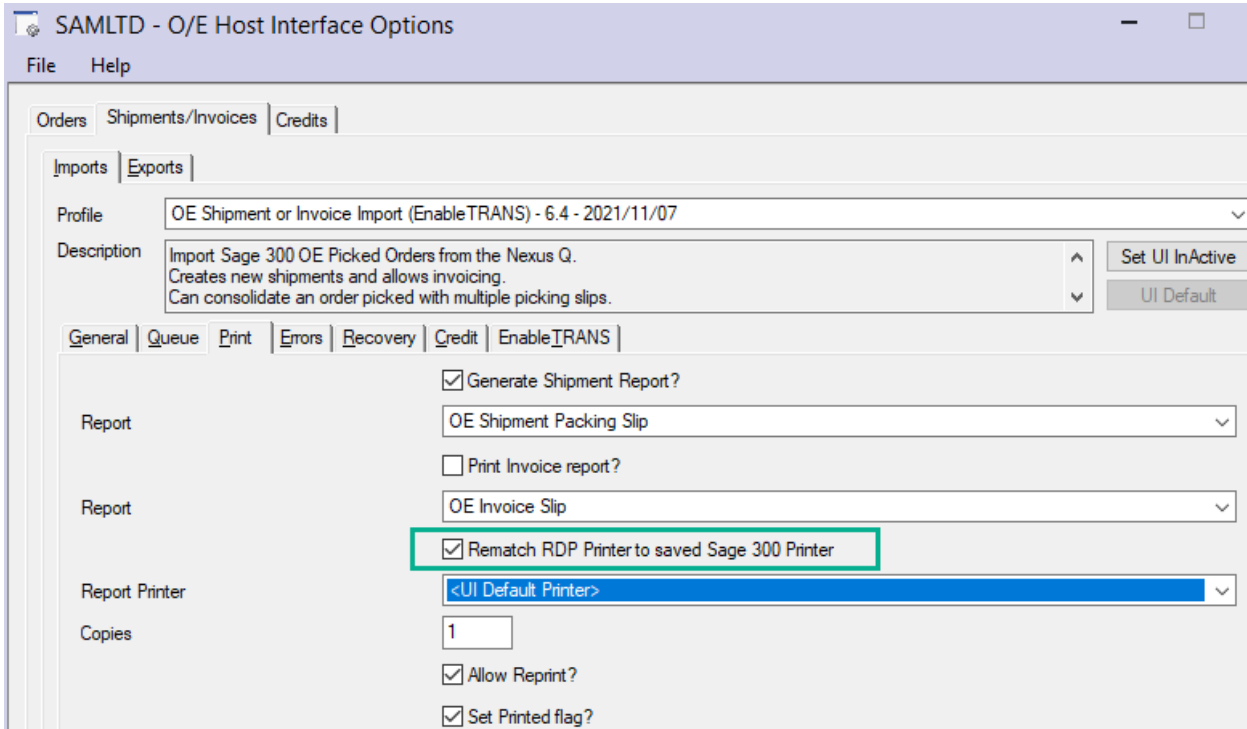


When running any of the EnableTRANS workflows as a Windows Service, the individual workflow will use its identified Sage Session User to harvest the specific printer settings in the Users Sage screen, including Nexus Host Interface Import/Export panels. A workflow service will use an additional User License.

## Better support for RDP redirected printers via 'Printer Rematch'

In RDP environments, Sage will report on the redirected printer as 'Printer Name (redirected {port number})' as presented by Windows. This renaming causes the redirected printer to not match your actual network printer name and Sage 300 may not be able to store the exact full name due to length limitations.

The EnableTRANS 'Sage 300 Adaptor' now has a 'Printer Rematch' feature that attempts to match the saved redirected printer name to your actual physical local / network printer name. If your operations involve RDP, you should select to use the 'Rematch' feature in each profile that prints, as illustrated below:



Under the covers, the rematch feature uses a 'regular expression' to strip off the (redirected ...' portion from the printer name.

Actual Windows Printer		Sage Saved Printer
HP LaserJet M203dw		HP LaserJet M203dw (redirected 167)
	↓	$^(.+)(red?i?r?e?c?t?e?d? ?\d*)?&#36;$ Our 'printer re-matcher' feature will search via regular expression, for the redirected string in your Sage 300 saved printer name and remove it to compare against your actual printers name
HP LaserJet M203dw		HP LaserJet M203dw (Matched)

Both of these two combined features significantly improve the printing results in complex network & RDP-cloud environments.

Pre-validation available in all Imports

<pre> &lt;?xml version="1.0" encoding="utf-8"?&gt; &lt;Decorator&gt;   ..&lt;Name&gt;Sage300OEShipmentPrevalidate&lt;/Name&gt;   ..&lt;Description/&gt;   ..&lt;Type&gt;Text&lt;/Type&gt;   ..&lt;FailedResolveFormat&gt;!!!{0}!!!&lt;/FailedResolveFormat&gt;   ..&lt;Contexts&gt;   ..&lt;Options&gt;     ...&lt;Option name="ValidateOrderExists" type="Boolean" default="true"/&gt;     ...&lt;!-- Order Complete and OnHold validations require ValidateOrderExists --&gt;     ...&lt;Option name="ValidateOrderComplete" type="Boolean" default="true"/&gt;     ...&lt;Option name="ValidateOrderOnHold" type="Boolean" default="true"/&gt;     ...&lt;Option name="ValidateCustomer" type="Boolean" default="false"/&gt;     ...&lt;Option name="ValidateShipTo" type="Boolean" default="false"/&gt;     ...&lt;Option name="ValidateDetailNum" type="Boolean" default="true"/&gt;     ...&lt;Option name="ValidateICITEM" type="Boolean" default="true"/&gt;     ...&lt;Option name="ValidateICITEM_FMT" type="Boolean" default="false"/&gt;     ...&lt;Option name="ValidateICILOC" type="Boolean" default="false"/&gt;     ...&lt;Option name="ValidateICUNIT" type="Boolean" default="false"/&gt;     ...&lt;Option name="ValidateICXLOT" type="Boolean" default="true"/&gt;     ...&lt;Option name="ValidateICXSER" type="Boolean" default="true"/&gt;     ...&lt;!-- --&gt;     ...&lt;Option name="DaysBeforeLotExpiryDate" type="Int32" default="0"/&gt;     ...&lt;Option name="DaysBeforeSerialExpiryDate" type="Int32" default="0"/&gt;   ..&lt;If.IsTrue="Option.ValidateICITEM"&gt;     ..&lt;ValidateDefault table="Detail"&gt;       ..dbCommand="ICITEM_Singleton"       ..&lt;Defaults&gt;         ..&lt;Default from="FmtItemNo" to="FmtItemNo"/&gt;         ..&lt;Default from="Description" to="Description"/&gt;         ..&lt;Default from="StockUnit" to="StockUnit"/&gt;         ..&lt;Default from="Inactive" to="Item_InActive"/&gt;       ..&lt;/Defaults&gt;       ..&lt;OnFailure&gt;         ..&lt;Log level="Warning" message="Order: '{DocNumber}': Item: '{ItemNo}' not found"           ..parameters={Header.DocNumber};{Detail.ItemNo}/&gt;         ..&lt;SetError table="Detail" field="ItemNo"           ..level="Error" stop="Manual"           ..fromText="Order: '{Header.DocNumber}': Item: '{Detail.ItemNo}' not found"/&gt;       ..&lt;/OnFailure&gt;       ..&lt;OnSuccess&gt;         ..&lt;If.IsTrue="Detail.Item_InActive"&gt;           ..&lt;Log level="Warning" message="Order: '{DocNumber}': Item: '{FmtItemNo}' is InActive"             ..parameters={Header.DocNumber};{Detail.FmtItemNo}/&gt;           ..&lt;SetError table="Detail" field="Item_InActive"             ..level="Error" stop="Manual"             ..fromText="Order: '{Header.DocNumber}': Item: '{Detail.ItemNo}' is InActive"/&gt;         ..&lt;/If&gt;       ..&lt;/OnSuccess&gt;     ..&lt;/ValidateDefault&gt;   ..&lt;/If&gt; </pre>	<p>All imports now feature a <b>Pre-validation</b> step before attempted Save/Post to Sage 300, reducing system impacts and providing more articulated and actionable error messages to users.</p>																																								
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<p>Results of SHIPPING Order ORD000000082-4</p> <table border="1"> <tr> <th colspan="2">Transaction Information</th> </tr> <tr> <td>Queue Tx #</td> <td>11847</td> </tr> <tr> <td>Application Tx #</td> <td>ORD000000082-4</td> </tr> <tr> <td>Transaction type</td> <td>OE Shipment</td> </tr> <tr> <td>Direction</td> <td>Import Manual</td> </tr> <tr> <th colspan="2">Log Information</th> </tr> <tr> <td>User ID</td> <td>ADMIN</td> </tr> <tr> <td>Start date</td> <td>01/21/2022 13:12:32</td> </tr> <tr> <td>Notices</td> <td>0</td> </tr> <tr> <td>Warnings</td> <td>0</td> </tr> <tr> <td>Errors</td> <td>1</td> </tr> <tr> <td>Critical errors</td> <td>0</td> </tr> <tr> <td>Show</td> <td>Warnings and above</td> </tr> <tr> <td colspan="2"> <input type="checkbox"/> Show errors preventing Shipping?         <input type="checkbox"/> Show errors preventing Invoicing?       </td> </tr> <tr> <th>Level</th> <th>Stop ...</th> <th>Stop i..</th> <th>Line</th> <th>Field</th> <th>Message</th> </tr> <tr> <td>Error</td> <td>Manual</td> <td>Manual</td> <td>7</td> <td>0</td> <td>Order 'ORD000000082': Item 'A13100' is InActive</td> </tr> </table>	Transaction Information		Queue Tx #	11847	Application Tx #	ORD000000082-4	Transaction type	OE Shipment	Direction	Import Manual	Log Information		User ID	ADMIN	Start date	01/21/2022 13:12:32	Notices	0	Warnings	0	Errors	1	Critical errors	0	Show	Warnings and above	<input type="checkbox"/> Show errors preventing Shipping? <input type="checkbox"/> Show errors preventing Invoicing?		Level	Stop ...	Stop i..	Line	Field	Message	Error	Manual	Manual	7	0	Order 'ORD000000082': Item 'A13100' is InActive	<p>Validation Errors are recorded to the Nexus Import results and Nexus Log for user resolution.</p> <p>As with any log, if the warning/error condition is flagged, it can trigger an email notification.</p>
Transaction Information																																									
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Application Tx #	ORD000000082-4																																								
Transaction type	OE Shipment																																								
Direction	Import Manual																																								
Log Information																																									
User ID	ADMIN																																								
Start date	01/21/2022 13:12:32																																								
Notices	0																																								
Warnings	0																																								
Errors	1																																								
Critical errors	0																																								
Show	Warnings and above																																								
<input type="checkbox"/> Show errors preventing Shipping? <input type="checkbox"/> Show errors preventing Invoicing?																																									
Level	Stop ...	Stop i..	Line	Field	Message																																				
Error	Manual	Manual	7	0	Order 'ORD000000082': Item 'A13100' is InActive																																				

## Transition Physical Inventory Import & Worksheet Helpers to EnableTRANS

The Import of Physical Inventory 'Stock Takes / Counts' was previously executed by our legacy UI-based imports from within the I/C Host Interface Import Panel. The import workflow, along with a number of helper actions have now been converted to EnableTRANS-based workflows resulting in faster and deeper error evaluation.

**Steps:** 1) Count, 2) Merge, 3) Import, 4) Extract Worksheet for optional review in Spreadsheet

### Count / Stock Take within Portable App – current version 4.4 which has differentiated Item/Barcode lookups

Physical Inventory App showing Header, Detail and Details panels.

The latest Counts app has a differentiated Item & Barcode lookup which may be a new feature for some clients.



The Physical Inventory Count / StockTake workflow can be complimented with the 'On-Board Counts' package to bring in other Inventory Counts from Sales Reps, 3PL, Customers and import those as well.

Both Counts from the handhelds and OnBoarded files can merge to the same location if intended.

### Merge Count Transactions in QBrowser which generates a single 'Merged Count' for each Location

The Merge Action will amalgamate all Count transactions into 1 Merged Count per Location.

Priority	Status	Hold	In Use	Type	QTx	AppTx	Location
Medium	Scanned			Merged Count	12133	PIM00001033-ET	2
Medium	Scanned			Merged Count	12132	PIM00001032-ET	1
Medium	Merged			Physical Count	12062	PI00001083-1	1
Medium	Merged			Physical Count	12043	PI00001082-1	1
Medium	Merged			Physical Count	12022	PI00001079-X1	2
Medium	Merged			Physical Count	11375	PI00001073-X1	2

The Merge process is a required step as it completes significant preprocessing to prepare for the import to the I/C Worksheet.



Specific pre-validations identify and classify errors so as to ascertain if the counted items can be 1) Updated to the Worksheet, and 2) if updated, what Worksheet Status will be set.

Errors are identified in the the Merged Counts with the option to resolve prior to import and re-run the Merge step, or, to allow continuing with import with the Item lines being set to 'On Hold', and/or Lot/Serial Items being excluded from the Import.

The Merged Count is intended to provide actionable information and to allow for Import at the earliest opportunity, with as much isolation and reconciliation predone. Merged Counts can be retained as an audit step.

☰ Viewing Merged Count PIM00001034-ET - □

✕ Close 📄 Edit Tx 🗨 Add Note ⬆ 2 of 6 ⬇ Find  ⬅ ➡

---

**AppTx** PIM00001034-ET Hold Partner 1 / Central warehouse - Seattle  
**Status** Scanned In Use  
**Priority** Medium HH Lines 3 Units 6  
Exported Thu Feb 3 9:50 AM Refreshed Thu Feb 3 9:50 AM

```

1: H,"1","PIMerged-1","1",3,6
2: D,"1","A11050","A11050","A1-105/0","13W Mini Fluorescent Bulb",39,0,-39,"Ea.",0,51,"Adjustment cost 0.00 <= 0"
3: D,"1","A1900B","A1900B","A1-900/B","Answering Machine",87,3,-84,"Ea.",15.864,53,"Item has +/- serial variances"
4: SV,"April00101","April-00101",1,0,82,"Item 'A1900B', Serial 'April00101' at location '1' is not available"
5: SV,"April00116","April-00116",-1,15.86
6: SV,"April00117","April-00117",-1,15.86
7: SV,"April00118","April-00118",-1,15.87
    
```

The Merged Count can be presented as a Flat File and using the right-click 'Copy Tx's' action, can be deposited into a spreadsheet for filtering and tabulation of those items not updated and variances.

### Current Pre-Validation Errors evaluated

- Count for Loc {Location} empty, cancelling job
- Worksheet for Loc {Location} old, Count placed 'On Hold'
- Item not in Sage 300 nor Worksheet
- Item not on Worksheet and InActive, likely not 'In Use'
- Item not on Worksheet, is Non-Stock
- Item on Worksheet is In-Active
- Item on Worksheet but not allowed at Loc
- Item not on Worksheet, no SortCode
- Item {ItemNo} SN {SerialNo} / {FmtSerialNo} <> exist
- Item {ItemNo} SN {SerialNo} at Loc {Location} vs {Location}
- Item {ItemNo} SN {SerialNo} at Loc {Location} not available
- Item {ItemNo} LT {LotNo} or FmtLot {FmtLotNo} <> exist
- Item {ItemNo} LT {FmtLotNo} at Loc {Location} vs {Location}
- Item {ItemNo} LT {FmtLotNo} at Loc {Location} not available
- Duplicate Serial encountered
- Missing Serial Costing
- Missing Lot Costing
- OnHand quantity {OnHandQty} < 0
- Adjustment cost {AdjustmentCost} <= 0
- OnHand qty {OnHandQty} < 0 and Adj cost {AdjustmentCost} <= 0
- Item has +/- Serial variances
- Item has +/- Lot variances

Import to I/C Worksheet via IC Host Interface 'Physical Inventory Import' screen

SAMLTD - Physical Inventory Import

File Worksheet Help

Import Profile: IC Physical Inventory Merged Import (EnableTRANS) - 6.4 - 2022/1 Sort by: App Tx

Q Tx number	Application Tx #	Description	Partner Code	Lines	Created
12134	PIM00001034-ET		1	3	2022/02/02
12135	PIM00001035-ET		2	3	2022/02/02

There is a single Import Profile to import the Merged Counts only. The original individual Counts are not imported.

Results of IMPORTING IC Worksheet PIM00001034-ET

Transaction Information

Queue Tx #: 12134 Transaction type: Merged Count

Application Tx #: PIM00001034-ET Direction: Import Manual

Log Information

User ID: ADMIN Notices: 1 Warnings: 2

Start date: 02/04/2022 09:25:30 Errors: 0 Critical errors: 0

Notices and above  Show errors preventing saving?  Show errors preventing posting?

Level	Stop ...	Stop ...	Message
Notice	None	None	Starting Validation Phase for PIMerged-1 : 1
Warning	None	None	Item 'A1-105/0' qty 0 Ea. will be updated on Worksheet as 'On Hold', status is 'Adjustment cost 0.00 <= 0'
Warning	None	None	Item 'A1-900/B' qty 3 Ea. will be updated on Worksheet as 'On Hold', status is 'Item has +/- serial variances'

During the Import Validation phase, any errors isolated during the Merge-Prevalidate step will be presented in the Results panel, prior to updating the IC Worksheet.

Level	Stop ...	Stop ...	Message
Notice	None	None	Starting Update Phase for PIMerged-1 : 1
Notice	None	None	Update Status Optional fields Item 'A1-105/0' for 'Adjustment cost 0.00 <= 0' at Location '1' with SortCode 'A11050'
Notice	None	None	Set Item 'A1-900/B' to On Hold for 'Item has +/- serial variances' at Location '1' with SortCode 'A1900B'
Notice	None	None	Update Status Optional fields Item 'A1-900/B' for 'Item has +/- serial variances' at Location '1' with SortCode 'A1900B'
Notice	None	None	Lot '00016-April' added to variance for Item 'A1-900/G' at Location '1'
Notice	None	None	Lot '00017-April' added to variance for Item 'A1-900/G' at Location '1'

During the Import Update Phase, any update to the Worksheet is logged and will be retained in the Nexus Log.

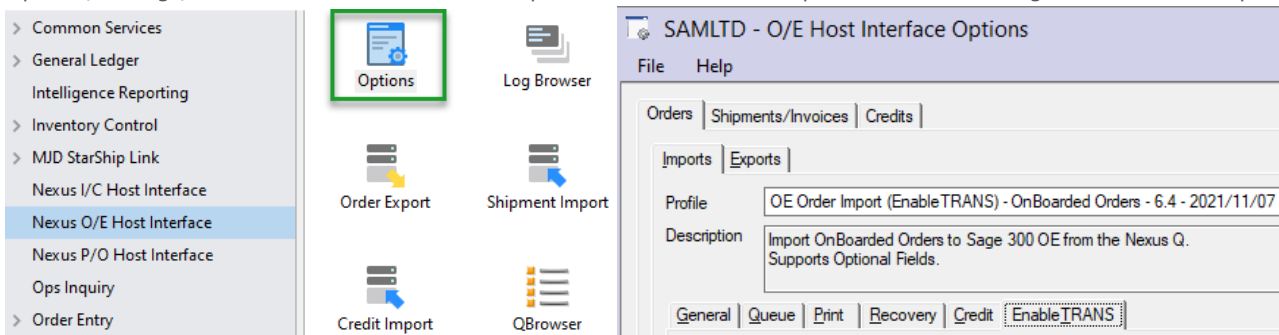
# Nexus Sage 300 Host Interfaces

## Added support for Sage 2022 PU1 (6.4A-6.9A)

- **Nexus Services (NX)** 6.4A R15
- **Nexus Host Interface I/C (PH)** 6.4A R23
- **Nexus Host Interface O/E (OQ)** 6.4A R21
- **Nexus Host Interface P/O (PQ)** 6.4A R22
- **EnableTRANS (Sage 300 Adaptor)** 0.7.0.10+

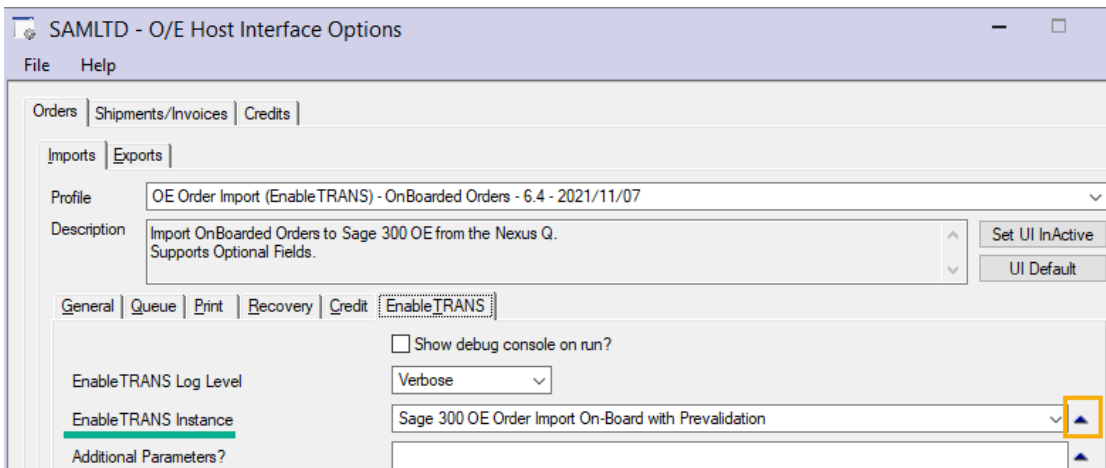
## Host Interface Options & Import / Export Screen Advancements

Each Host Interface has an Options screen, typically with restricted access to Admin or Operations Lead team members. Options include tabs for each Host Interface Export / Import screen, each with a number of subtabs providing a large number of prebuilt options/settings/values. All entered & selected options will be saved in '.opt' files within the Sage 300 Shared company folder.



## Select and Edit EnableTRANS Instances from with Host Interface Options

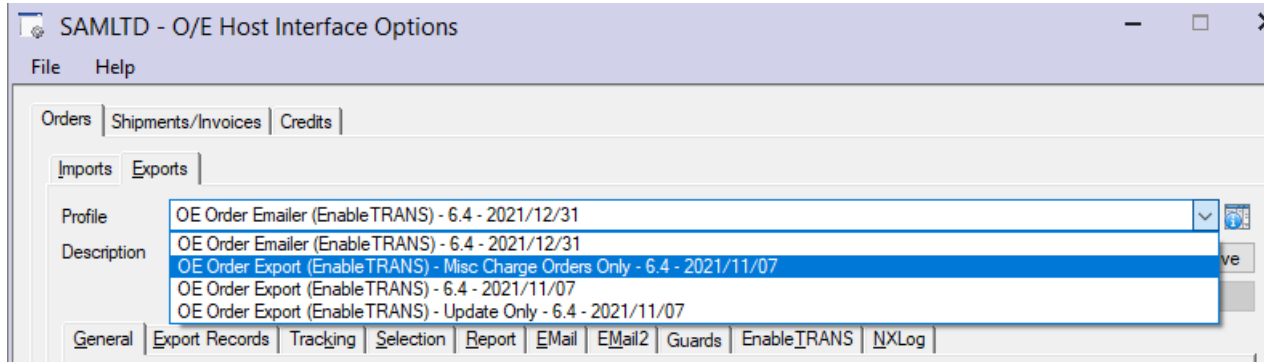
As an integrated, external ETL Framework, EnableTRANS has its own collection of settings referred to as 'Instances'. Instances carry system parameters that are modified less frequently for implementation changes. Each Profile now allows for both selecting and customizing the prebuilt EnableTRANS Instances.



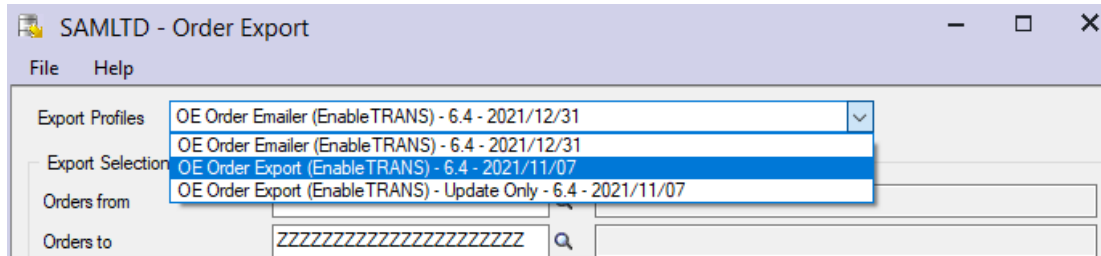
The 'Edit Options' and 'Edit Profile' button and the new 'Edit Instance' icon will now use the Edit Command in the Nexus Setup if it exists, else it will revert to Notepad.exe. Notepad++ is typically the default.

## Open Export / Import Screen with a single 'locked' profile

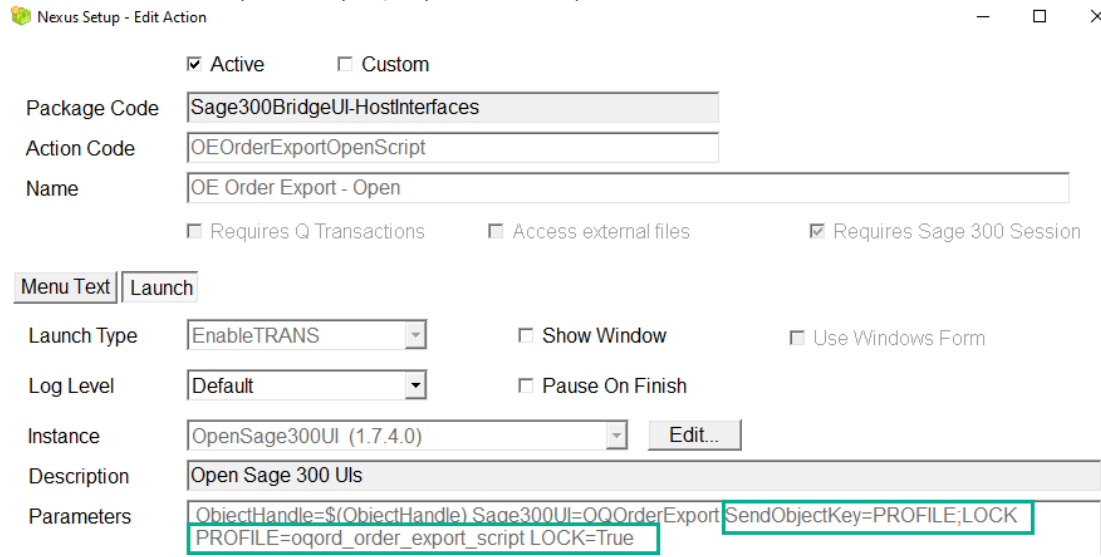
Host Interface Options allow for multiple differentiated Export, Import and Email Profiles, in addition to allowing to flag each as 'Active' and one as 'Default'.



Multiple profiles are very useful, it can be problematic if users do not choose the correct profile at run time.



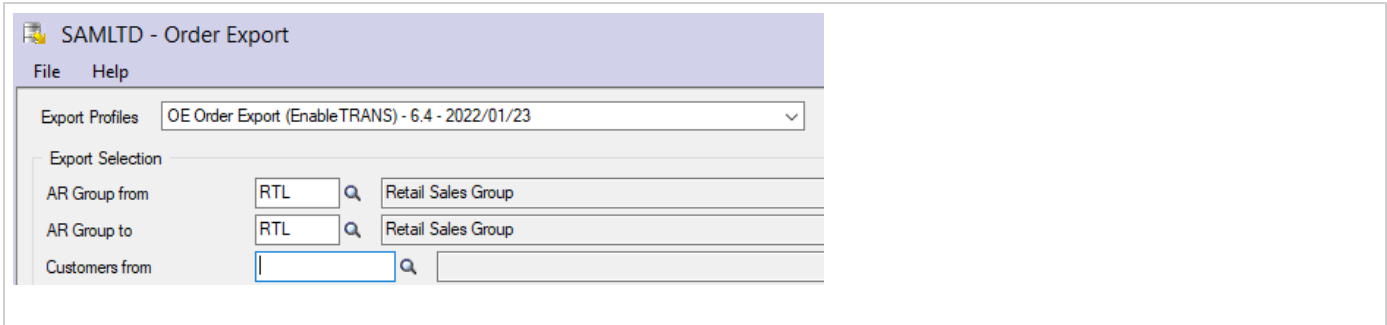
When an Import or Export screen is opened from a Nexus Action in the QBrowser, it now includes the 'LOCK' parameter to limit the user to the specific Export/Import declared profile.



RESULT: Upon opening, the user will be presented with the single Export / Import / Email profile.

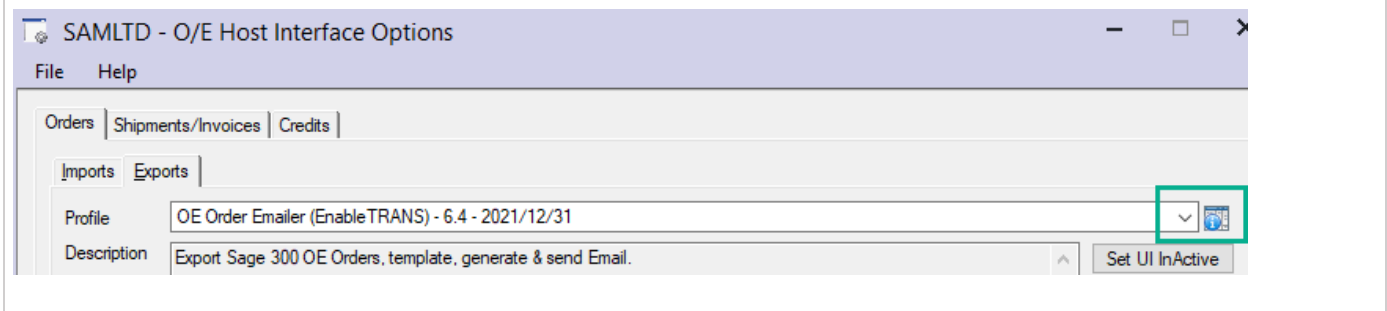


## Added optional support for AR Customer Group selection in Order and Invoice Export panels



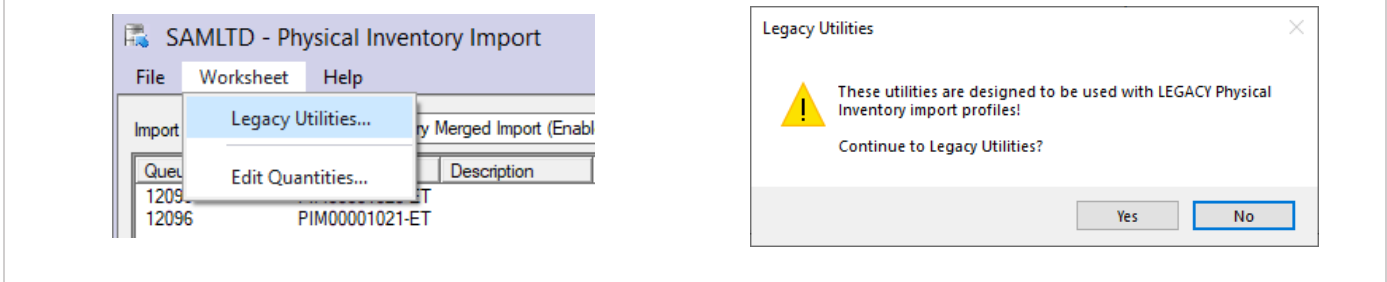
## Added support for optional Html help files for Export / Import Profiles

Added support for simple Html help files for each Export / Import / Email profile. These will be named with the same root name of the Export / Import profile, also stored in the Company shared folder, and typically used to record custom docs.



## Renamed IC Worksheet Utilities to Legacy and Warn on Open

Worksheet Utilities, accessible from the Physical Inventory Import screen, are now marked as 'Legacy Utilities' as the new EnableTRANS-based Physical Inventory Import workflow does not require their usage.



**Fixed** – Fixed an error on the Export Results related to the QBrowse button being available when there was no transaction in scope.

### Log Browser – Expanded Error Log Details, Copy to Clipboard and Line/Field Source Highlight

When testing or importing a transaction to Sage 300, the Nexus Log Browser records and classifies detailed results. As per the following example, there are several warnings noted. The recent 'Pre-validation' steps significantly increase the number of potential warnings / errors.

While there has always been an ability to 'Dump' the log, users can now quickly copy the filtered log details to support later resolution work or to pass to a colleague. As we have significantly increased the number of warning and error messages via the Pre-validation steps, users will often be required to do remedial work to resolve the detailed warnings/errors and capturing a snapshot in this fashion is helpful.

Additionally, 'Warning' & 'Error' messages now correctly align to highlight the source line and field.

SAMLTD - View Edit Logs for Q Tx # 11844 only

Queue Tx # 11844 App Tx OE Shipment ORD000000082

Method Auto Direction Import Document OE ORDER SH0000000083 3

Processed Saved Reviewed No User ADMIN 12/02/2021 13:06:42

Filter for Notices and above 3 Warnings 0 Errors 0 Critical errors

Date	Time	Level	Stop ...	Stop ...	Line	Field	Message
12/2/2021	13:06:42	Notice	None	None	1	0	Order ORD000000082 found and added to shipment.
12/2/2021	13:06:42	Warning	None	None	5	5	Sage Messages: Quantity shipped is greater than quantity ordered.
12/2/2021	13:06:42	Warning	None	None	0	0	For item 'A1-105/0' qty shipped 15 is greater than qty outstanding 1.
12/2/2021	13:06:42	Notice	None	None	5	0	Shipped 15 'Ea.' of 'A1-105/0' from Loc '1'.
12/2/2021	13:06:42	Warning	None	None	0	0	For item 'A1-310/0' qty shipped 1 is less than qty outstanding 2.
12/2/2021	13:06:42	Notice	None	None	7	0	Shipped 1 'Ea.' of 'A1-310/0' from Loc '1'.
12/2/2021	13:06:43	Notice	None	None	1	0	OE Shipment 'SH0000000083' SAVED!
12/2/2021	13:06:43	Notice	None	None	0	0	Nexus Tx 11844 marked as processed after successful save

Transaction File

```
H,"ORD000000082","1105","Bargain Mart - Oakland","2021-12-02T15:40:00","2021-12-02T15:40:57"
HO,DEVICEUSER,"ADMIN"
HO,DEVICEID,"NX1"
HF,SHIPTRACK,""
D,1,"A11050","13W Mini Fluorescent Bulb",13,"Ea.",1
DO,SCANNED,0
D,2,"A13100","Halogen Desk Light",1,"Ea.",1
```

### Changes to the Purge Nexus Logs

Changed the default settings on the Purge NX Logs screen.

'30 days old' is now the age default and the 'Only purge logs for deleted transactions' setting is now set to true.

SAMLTD - Purge Logs

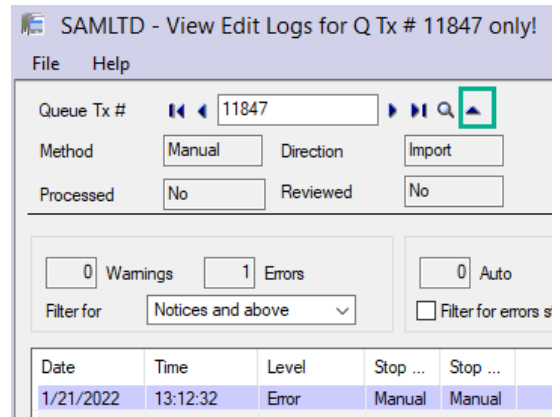
Purge all logs older than 30 days old

Only purge logs for deleted transactions?

Purge Close

## Added Icon to 'Unlock' View Edit Nexus Log Detail

We have provided a **new icon** to allow releasing the QTx Number lock which is triggered when entering the log details and allows to focus on the multiple occurrences of the same transaction.



**Added** - As the Nexus Log can become quite populated, we have added a 'wait cursor' to any refresh data actions in the main log.

**Added** - 2 new Object Keys 'TRANSTYPE' and 'ACTION' so that there is more control when opening the Log Browser externally from the QBrowser.

**Added** – If a Shipment import against an Order failed, the Original Order will now be presented to open, likewise a PO button link will be presented if the PO Receipt import fails.

**Fixed** - a number of cosmetic and underlying errors that may have thrown a 'subscript' error.

**Fixed** – Fixed display of 'Show errors preventing Save' & 'Show errors preventing Post' checkboxes in View Logs

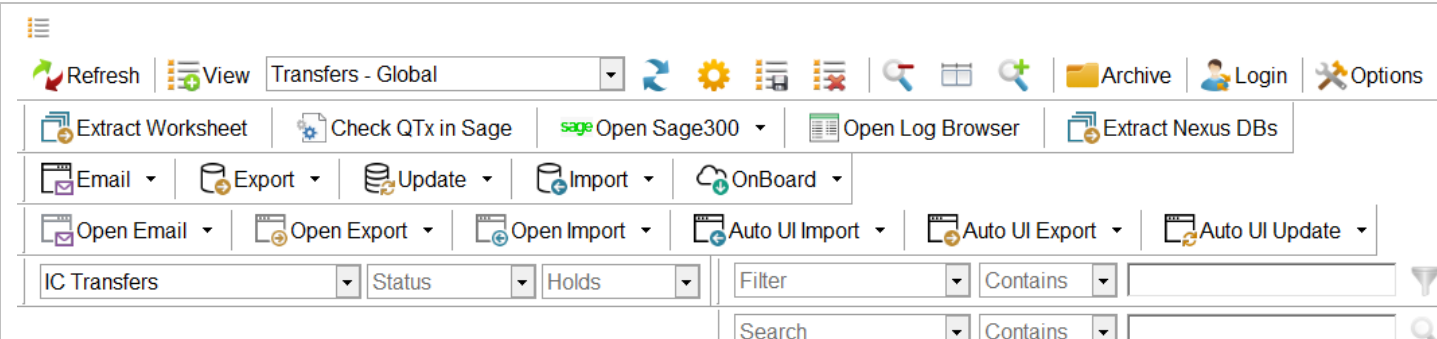
**Fixed** – Persist Filter on Log Results panel had not been working correctly.

**Fixed** – Invoice button in Nexus Log Browser did not work. Works now but only in Inquiry mode, as per Sage logic.

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

## QBrowser & Nexus Actions Advancements

### New Icons and Action Bar Grouping



The screenshot shows the top toolbar of the QBrowser interface. It includes a menu icon, a Refresh button, a View dropdown set to 'Transfers - Global', and several utility icons like a gear, a list, a search, and a calendar. On the right side of the toolbar are buttons for Archive, Login, and Options. Below the toolbar are three rows of action buttons: the first row has Extract Worksheet, Check QTx in Sage, sage Open Sage300 (with a dropdown), Open Log Browser, and Extract Nexus DBs; the second row has Email, Export, Update, Import, and OnBoard; the third row has Open Email, Open Export, Open Import, Auto UI Import, Auto UI Export, and Auto UI Update. Below these are filter and search sections with dropdown menus for 'IC Transfers', 'Status', 'Holds', 'Filter', and 'Search', and 'Contains' dropdowns.

**New Icons:**

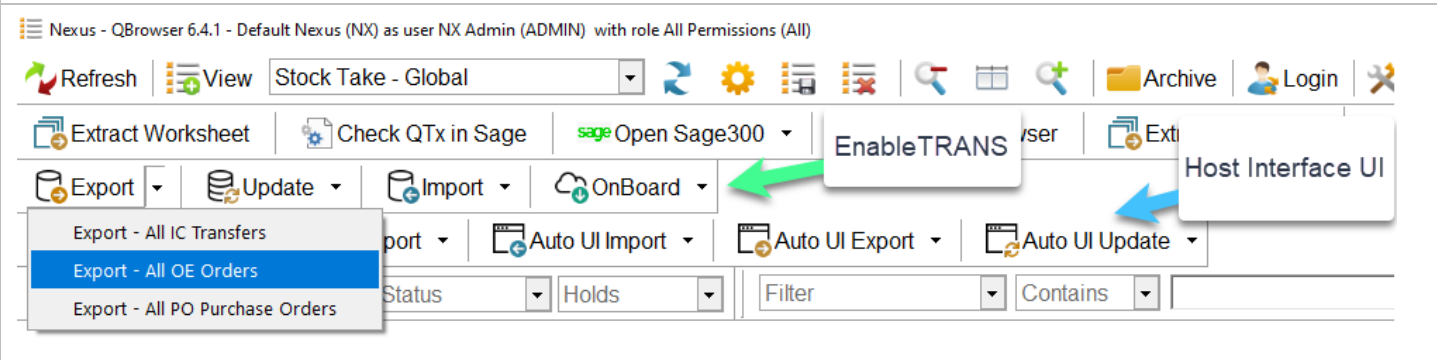
- User-triggered actions are Grey, Automations are Black
- Exports have yellow right overlays, Imports have blue left overlays, Emailers have purple overlays
- OnBoard has a green downward overlay, OffBoard has an orange upward overlay

Icon & Toolbar Regrouping:

- Action Bar 1 – Typically non-transaction Actions
- Action Bar 2 – EnableTRANS transaction Automation Actions
- Action Bar 3 – Host Interface Automations and User Panel-based Exports/Imports

### Transition to EnableTRANS-based Automated Exports / Imports for Nexus Actions

QBrowser-based Nexus Actions that automate Exports / Imports / Emails, now directly trigger EnableTRANS workflows vs Sage Host Interface UIs. EnableTRANS automations provide for faster execution and incur significantly less Sage 300 system impact. The QBrowser will by default arrange the new EnableTRANS-based actions on 'Action Bar 2'.



The screenshot shows the QBrowser interface with the title bar 'Nexus - QBrowser 6.4.1 - Default Nexus (NX) as user NX Admin (ADMIN) with role All Permissions (All)'. The toolbar is similar to the previous screenshot but includes an 'EnableTRANS' button. A green arrow points from the 'EnableTRANS' button to the 'Export' dropdown menu, which is open and shows three options: 'Export - All IC Transfers', 'Export - All OE Orders' (highlighted in blue), and 'Export - All PO Purchase Orders'. A blue arrow points from the 'Host Interface UI' button to the 'Auto UI Export' button. The 'Auto UI Export' button has a yellow right overlay, while the 'Export' button has a blue left overlay.



## More articulation over Toolbars

<p>To better support various screen sizes and to provide a more compact view for experienced users, you can now turn captions on / off for the main QBrowser toolbar.</p>	
	<p>To support the grouping of Nexus Actions, the QBrowser now offers the ability to selectively enable / disable Action Bars.</p>

## Introduction of Email Actions

<p>Email workflows are available for Order Confirmations, Shipment Advices and Invoices. Like all workflows, the emailers can typically be executed in several different fashions:</p> <table border="1"> <tr> <td>EnableTrans.ETService (Instance: DBExtract)</td> <td>Extraction of flat files as DB Lookups for Nexus Client</td> </tr> <tr> <td>EnableTrans.ETService (Instance: EmailTxS)</td> <td>Export Sage 300 Transactions, template as Email and Send via SMTP Endpoint</td> </tr> <tr> <td>EnableTrans.ETService (Instance: ETNexusDirector)</td> <td>Monitor and Manage Nexus Q Transactions based upon Transaction state in ...</td> </tr> <tr> <td>EnableTrans.ETService (Instance: ExportTxSNXClient)</td> <td>Export transactions from Sage 300 to the Nexus Transaction Queue</td> </tr> <tr> <td>EnableTrans.ETService (Instance: ImportTxSage300)</td> <td>Import transactions from the Nexus Queue to Sage 300</td> </tr> <tr> <td>EnableTrans.ETService (Instance: OnBoardToNX)</td> <td>OnBoard Transactions To Nexus from external file stores</td> </tr> <tr> <td>EnableTrans.ETService (Instance: TableSync)</td> <td>SFOL to Sage 300 Table UPSERT</td> </tr> </table>	EnableTrans.ETService (Instance: DBExtract)	Extraction of flat files as DB Lookups for Nexus Client	EnableTrans.ETService (Instance: EmailTxS)	Export Sage 300 Transactions, template as Email and Send via SMTP Endpoint	EnableTrans.ETService (Instance: ETNexusDirector)	Monitor and Manage Nexus Q Transactions based upon Transaction state in ...	EnableTrans.ETService (Instance: ExportTxSNXClient)	Export transactions from Sage 300 to the Nexus Transaction Queue	EnableTrans.ETService (Instance: ImportTxSage300)	Import transactions from the Nexus Queue to Sage 300	EnableTrans.ETService (Instance: OnBoardToNX)	OnBoard Transactions To Nexus from external file stores	EnableTrans.ETService (Instance: TableSync)	SFOL to Sage 300 Table UPSERT	<p>Run continuously with scheduled trigger via Windows Service</p>
EnableTrans.ETService (Instance: DBExtract)	Extraction of flat files as DB Lookups for Nexus Client														
EnableTrans.ETService (Instance: EmailTxS)	Export Sage 300 Transactions, template as Email and Send via SMTP Endpoint														
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EnableTrans.ETService (Instance: OnBoardToNX)	OnBoard Transactions To Nexus from external file stores														
EnableTrans.ETService (Instance: TableSync)	SFOL to Sage 300 Table UPSERT														
	<p>Via Host Interface Export panel with criteria ranges. This can also be opened via the 'Open Email' icon on the QBrower Toolbar.</p>														
	<p><b>(NEW)</b> Automated Email send from QBrower toolbar, (<i>Email icon</i>) or shortcut elsewhere.</p>														
	<p><b>(NEW)</b> Automated Email send for specific selected Nexus Q Transactions via right-click menu in QBrower.</p>														

## Better management of cursor positioning in Search / Edit

Editing OE Shipment ORD000000082-4
6 of 6
Find A11050

AppTx **ORD000000082-4** Hold

Status **Scanned** In Use

Priority **Medium** HH **NX1**

Partner **1105 / Bargain Mart - C**

**Need this prior to new Store C**

Lines **2** Units **15**

Exported **Mon Dec 6 2:45 PM**

H,"ORD000000082","1105","Bargain Mart - Oakland","2021-12-06T17:41:37","2021-12-06T17:41:37",

HO,DEVICEUSER,"ADMIN"

HO,DEVICEID,"NX1"

HF,SHIPTRACK,""

D,1,"A11050","13W Mini Fluorescent Bulb",14,"Ea.",1

DO,SCANNED,0

D,2,"A13100","Halogen Desk Light",1,"Ea.",1

DO,SCANNED,0

Improved support for search and editing by retaining the cursor position of a searched data element once shifting to Edit mode.

## Open Transaction or Log upon Save / Post

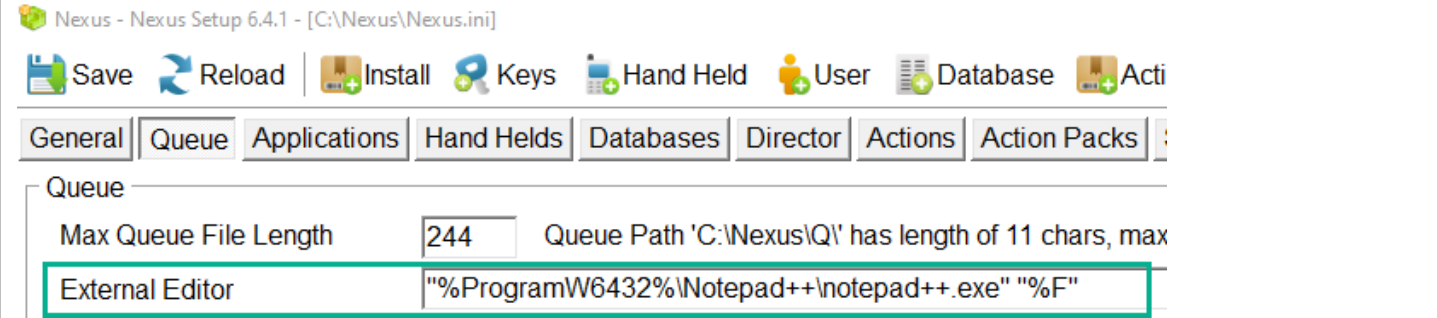
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Priority</td><td>&gt;</td><td>11268 TR00001175-X1 1:2</td></tr> <tr><td>Status</td><td>&gt;</td><td>11269 TR00001180-X1 1:2</td></tr> <tr><td>Hold</td><td>&gt;</td><td>11270 TR00001182-X1 1:2</td></tr> <tr><td>Assign To</td><td>&gt;</td><td>11271 TR00001184-X1 1:2</td></tr> <tr><td>View/Edit Tx(s) Ctrl+V</td><td>&gt;</td><td>11272 TR00001185-X1 1:2</td></tr> <tr><td></td><td>&gt;</td><td>11273 TR00001186-X1 1:2</td></tr> <tr><td></td><td>&gt;</td><td>11274 TR00001193-X1 1:2</td></tr> <tr><td>Import</td><td>&gt;</td><td>Import - IC Transfers</td></tr> <tr><td>Open Log</td><td>&gt;</td><td>Import - IC Transfers, Open Log</td></tr> </table>	Priority	>	11268 TR00001175-X1 1:2	Status	>	11269 TR00001180-X1 1:2	Hold	>	11270 TR00001182-X1 1:2	Assign To	>	11271 TR00001184-X1 1:2	View/Edit Tx(s) Ctrl+V	>	11272 TR00001185-X1 1:2		>	11273 TR00001186-X1 1:2		>	11274 TR00001193-X1 1:2	Import	>	Import - IC Transfers	Open Log	>	Import - IC Transfers, Open Log	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Priority</td><td>&gt;</td><td>1371 TR00001184-X1 1:2</td></tr> <tr><td>Status</td><td>&gt;</td><td>1372 TR00001185-X1 1:2</td></tr> <tr><td>Hold</td><td>&gt;</td><td>1373 TR00001186-X1 1:2</td></tr> <tr><td>Assign To</td><td>&gt;</td><td>1383 TR00001193-X1 1:2</td></tr> <tr><td>View/Edit Tx(s) Ctrl+V</td><td>&gt;</td><td>1384 TR00001194-X1 1:2</td></tr> <tr><td></td><td>&gt;</td><td>1385 TR00001195-X1 1:2</td></tr> <tr><td></td><td>&gt;</td><td>1386 TR00001196-X1 1:2</td></tr> <tr><td>Import</td><td>&gt;</td><td>Import - IC Transfer, Open Transfer</td></tr> </table>	Priority	>	1371 TR00001184-X1 1:2	Status	>	1372 TR00001185-X1 1:2	Hold	>	1373 TR00001186-X1 1:2	Assign To	>	1383 TR00001193-X1 1:2	View/Edit Tx(s) Ctrl+V	>	1384 TR00001194-X1 1:2		>	1385 TR00001195-X1 1:2		>	1386 TR00001196-X1 1:2	Import	>	Import - IC Transfer, Open Transfer
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	>	1386 TR00001196-X1 1:2																																																		
Import	>	Import - IC Transfer, Open Transfer																																																		

For all imports, there are now options to open the log results where multiple imports are selected or open the Imported transaction, where a single import is completed.

**Added** – A user can now modify the EnableTRANS Instance associated with the Nexus Action without marking the Action as customized.

## Nexus Setup Modifications

### Updated the default editor expected by Nexus Setup



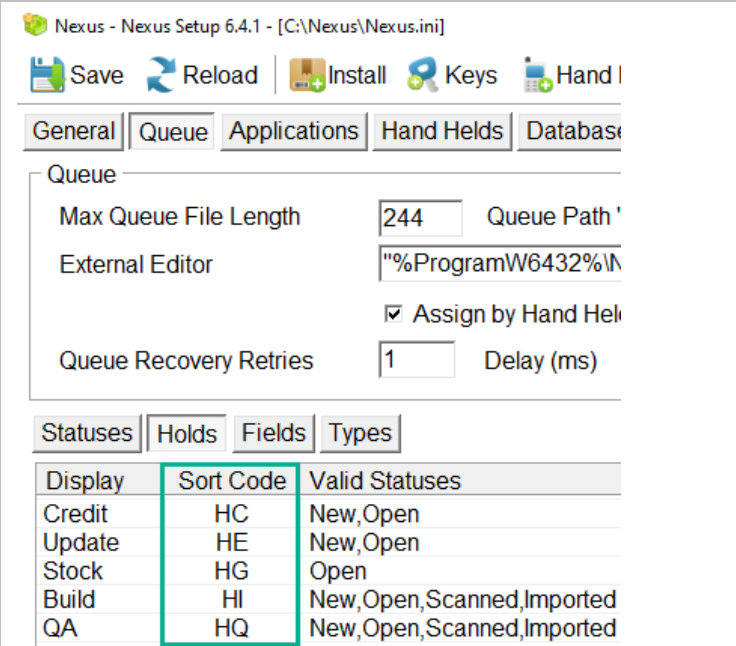
Queue

Max Queue File Length  Queue Path 'C:\Nexus\Q\' has length of 11 chars, max

**External Editor**

Notepad++ is the default text file editor used in Nexus & EnableTRANS environment. We have adjusted the default environment variable to better find the programs across various workstations / OS versions. If NotePad++ is not available, the various edit panels will default to Windows Notepad. This setting is also used by the Edit Instance feature in Host Interface Options.

### Expanded the Hold 'Sort Code' to allow for Order to QTx mapping



Queue

Max Queue File Length  Queue Path 'C:\Nexus\Q\' has length of 11 chars, max

External Editor

Assign by Hand Held

Queue Recovery Retries  Delay (ms)

Sort Codes

Display	Sort Code	Valid Statuses
Credit	HC	New,Open
Update	HE	New,Open
Stock	HG	Open
Build	HI	New,Open,Scanned,Imported
QA	HQ	New,Open,Scanned,Imported

SAMLTD - O/E Order Entry

File Settings Help

Order No.

Customer No.

Order Customer Taxes Optional Fields Sales Split Rates Totals

Template Code  PO No.

Order Date   On Hold

Nexus has several standard system holds, but users can create custom Holds that are responsive to their operational requirements for use in the QBrowse. The image to the left shows the installed defaults.

The 'Sort Code' is the identifier of the User-Defined Hold and it can be used when mapping from a transaction to the Q.

In prior versions the Sort Code was shown as 'C, E, G, etc' which was a bit misleading as the explicit value includes the preceding 'H' character.

The following example shows how to map a Hold from an Order to the Q.

Status	Hold	Type
Open	Stock	OE Order to Pick
Open		OE Order to Pick

While a user can always manually update the Hold Reason field, it's typically set via an on-boarding workflow from EDI, Webstore, etc.

Portable App Advancements – Transfer Collect

**Add Dynamic Panels: Example IC Transfers Collect**

TR00001221-1

HDR HDR2 DTL DTLS TTLS

Doc TR00001221-1

Type **Transfer**

Src

Dest

TR00001221-1

HDR HDR2 DTL DTLS TTLS

Doc TR00001221-1

Type **Transit Transfer**

Src

GIT **TRANS**

**Goods in Transit**

Dest

TR00001221-1

HDR HDR2 DTL DTLS TTLS

Doc TR00001221-1

Type **Transit Receipt**

Trnsf

Src

GIT **TRANS**

**Goods in Transit**

Dest

As a user selects the Transfer transaction type, the Header panel will redraw to present the fields required for entry.

**New Transit Transfer Lookup**

Select Orig Transit Transfer

Back Select

Find

Transfer	Src	GIT	Dest	Re
TRF000000001	1	TRANS	2	
TRF000000003	1	TRANS	2	
TRF000000004	1	TRANS	2	
TRF000000005	3	TRANS	1	

TR00001221-1

HDR HDR2 DTL DTLS TTLS

Doc TR00001221-1

Type **Transit Receipt**

Trnsf **TRF000000004**

Src **1**

**Central warehouse - Seattle**

GIT **TRANS**

**Goods in Transit**

Dest **2**

**Portland Office**

TR00001222-1

Back

Orig Transit Transfer

Ref **#S445**

Desc **Heavy Lift on Dock Appt**

Post Dt **Jan 18 22**

Arrive **Jan 18 22**

The new Transit Transfer Lookup relieves the operator from having to enter the Transfer # and correct Locations, often a source of data entry errors. In addition, Header data elements, such as the Reference, Desc & Transaction Dates can be shown in the additional Pop-up icon.

- The EnableTRANS 'Nexus DB Extract' package has been augmented to provision the additional ICTransitTransferHDR lookup db.
- There has been an significant update to the associated IC Transfer Import to expand on the under / over errors-warnings for Transit Transfers.

## EnableTRANS 0.7.0.11 – Introduction

*EnableTRANS is an 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 script and settings files which can be mounted in Sage, Nexus and/or Windows Services.

- Existing clients will have EnableTRANS already installed into their Nexus environment, providing 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/3PL 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 using highly declarative assets to achieve workflow automations. EnableTRANS caches dynamically compiled 'workflow packages' providing the speed of compiled programs and the declarative flexibility of scripts.

EnableTRANS core functionality includes:

- SQL Adaptors for extraction, insert & update,
- read/write of flat and XML files,
- expression-driven data transformation,
- automated report & label generation and delivery,
- 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 Integration with the Nexus Host Interfaces

The Nexus Host Interfaces have integrated EnableTRANS as the 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 via EnableTRANS.

EnableTRANS-based Nexus Exports & Imports are highly declarative and customizable automations that 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 as automated windows services,
- custom data exchanges between Sage 300 and external applications/databases and trading partners, and,
- relief for 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.**

**Example 1: QBrowser**

Priority	Status	Merge PO Receipts	Merge Count QTx	Open as Excel	Open	Reset Duration
					Open OE Order Entry for AppTx	

**Example 2: Nexus Log Browser**

Method	Action	Module	ERP Type	Document
Manual	Email	OE	ORDER	ORD0000114
Test	Email	OE	ORDER	ORD0000114
Auto	Sync	IC	ICIOTH	
Auto	Sync	IC	ICUNIT	

**SAMLTD - O/E Order Entry (Top)**

Order No. ORD000000000063  
Customer No. 1105  
Template Code ACTIVE  
Order Date 30/06/2020

**SAMLTD - O/E Order Entry (Bottom)**

Order No. ORD00000114  
Customer No. 1200  
Template Code ACTIVE  
Order Date 03/08/2021

### EnableTRANS running a Sage 300 Report externally from the QBrowser

InReview	PO to Receive	7546621	PI
Open	OE Order to Pick	7546620	O
Open	Priority		
Open	Status		
Open	Hold		
Open	Assign To		
Scale	View/Edit Tx(s)	Ctrl+V	
Scale	Send Transfer to 3PL		
New	Print		
Scale	Merge Count QTXs		
Scale	Physical Count	7546605	O

**Sample Company Limited** **Order Confirmation**

123 Sample Company Place  
Any City, Any Province V6J 5R3  
Canada  
Phone: (123) 456-7890  
Fax: (123) 456-7891

<b>Sold To:</b> Mr. Ronald Black 3520 Wabash Road Los Angeles, CA 90048	<b>Ship To:</b> Home office 12 Elegant Drive Los Angeles, CA 90055 USA
--	--

Reference	PO Number	Customer No.	Salesperson
		1200	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

Mr. Ronald Black  
Enablecore Admin

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 calculated fields, not available in SQL.

```

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

```

## EnableTRANS Execution

### Windows Service

EnableTrans.ETService (Instance: DBExtract)	Extraction of flat files ...
EnableTrans.ETService (Instance: ETNexusDirector)	Monitor and Manage ...
EnableTrans.ETService (Instance: ExportTxSNXClient)	Export transactions fro...
EnableTrans.ETService (Instance: ImportTxSage300)	Import transactions fr...
EnableTrans.ETService (Instance: OnBoardToNX)	OnBoard Transactions ... <b>Running</b>
EnableTrans.ETService (Instance: TableSync)	SFOL to Sage 300 Tabl...

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

### QBrower Nexus Action

Priority	Status	Type	QTx	AppTx	C
Medium	Transformed	OE Raw Order	11147	RAWOrderTSVFlat12345	
Medium	OnBoarded	OE Order	11151	1213457	1
Medium	OnBoarded	OE Order	11150	1213456	1

Package execution can also be executed from the QBrower 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

Queue Tx#	App Tx#	Description	Ha
11150	1213456	RAWOrderTSVFlat12345-1213456	
11151	1213457	RAWOrderTSVFlat12345-1213457	

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. While a Windows Service is retrieving Orders from an Ecommerce site hourly, a user could also trigger an on-demand retrieval from a QBrower Nexus Action.



## EnableTRANS – Available Workflow Packages

<b>Emailers – Html Body, Include Reports, Carrier Tracking Links</b>			
<i>Action</i>	<i>Transaction</i>	<i>'Legacy'</i>	<i>'EnableTRANS'</i>
Email	PO: Purchase Order	n/a	Y (planned)
Email	OE: Order	n/a	Y
Email	OE: Shipment	n/a	Y
Email	OE: Invoice	n/a	Y
<b>OnBoarding (From SQL, Flat / Heirarchial Files, XML Docs)</b>			
<i>Action</i>	<i>Transaction</i>	<i>'Legacy'</i>	<i>'EnableTRANS'</i>
OnBoard	PO: Purchase Order	n/a	Y
OnBoard	PO: Requisition	n/a	Y
OnBoard	OE: Order	n/a	Y
OnBoard	OE: Shipment	n/a	Y
OnBoard	IC: Receipt	n/a	Y (planned)
<b>Exports &amp; Imports</b>			
<i>Direction</i>	<i>Transaction</i>	<i>'Legacy'</i>	<i>'EnableTRANS'</i>
Import	PO: Requisition		Y
Import	PO: Purchase Order	Y	Y
Export	PO: Purchase Order	Y	Y
Import	PO: Return	Y	Y
Import	PO: Receipt	Y	Y
Export	PO: Receipt	Y	
Import	PO: Return	Y	
Import	IC: Physical Inventory Counts to Worksheet	Y	Y (new)
Import	IC: Assemblies	Y	Y
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
Export	OE: Invoice	Y	Y
Import	OE: Invoice	Y	
Import	OE: Credit Import	Y	
EnableTRANS Workflow Packages availability will continue to expand, per client and project demand.			

# Examples of 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 (vis Widows Service or Ad hoc)

The screenshot shows the Nexus QBrowser interface. At the top, a list of workflows is displayed, with 'EnableTRANS.ETService (Instance: OnBoardToNX)' selected. Below this, an XML configuration for the workflow is shown, including details like Name, Description, Version, and Schedules. The bottom part of the screenshot shows the 'OnBoard' dropdown menu with options like 'OE Orders - WooCommerce FTP', 'OE Orders - Local TSV', and 'OE Orders - Local iPad Orders (xml)'.

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.

The screenshot shows the Nexus QBrowser interface with a table of transaction data. The table has columns for Priority, Status, Type, QTx, and AppTx. A row is highlighted with a green border, showing 'Medium OnBoarded OE Raw Order 11147 RAWOrderTSVFlat12345'. Below this, a detailed table shows transaction details including Status, Type, QTx, Description, and Customer.

Priority	Status	Type	QTx	AppTx
Medium	OnBoarded	OE Raw Order	11147	RAWOrderTSVFlat12345

Status	Type	QTx	Description	Customer
OnBoarded	OE Order	11152	RAWOrderTSVFlat12345-1213456	1200
OnBoarded	OE Order	11153	RAWOrderTSVFlat12345-1213457	1200
Transformed	OE Raw Order	11147	RAWOrderTSVFlat12345	

When retrieved into the Nexus Tx Queue, 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.

## Transformation Scripting for Translation, Validation, Defaults, Error & Notice Logging

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.

```
<ForEachRow table="Detail" filter="[TxNo] = {Header.TxNo}" asVariable="Detail" >
  <OnEach>
    <If.isTrue="Option.TranslateCustomerItem">
      <ValidateDefault table="Detail"
        dbCommand="ICITMC">
        <Defaults>
          <Default from="ItemNo" to="ItemNo"/>
        </Defaults>
        <OnFailure>
          <SetError table="Detail"
            fromText="No translation for Customer: '{Detail.CustomerCode}'" />
          <Log level="Warning" message="Order: '{DocNumber}': No translation for Customer: '{Detail.CustomerCode}'"
            parameters="{Header.DocNumber}; {Detail.CustomerCode}; {Detail.ItemNo}" />
        </OnFailure>
      </If.isTrue>
    </OnEach>
  </ForEachRow>
```

**Translation:** of Customer / Vendor / Manufacturers Item Number to I/C Item Number with Unit & Unit Conversion Factor.

```
<If.isTrue="Option.ValidateICITEM">
  <ValidateDefault table="Detail"
    dbCommand="ICITEM">
    <Defaults>
      <Default from="FmtItemNo" to="FmtItemNo"/>
      <Default from="Description" to="Description"/>
      <Default from="StockUnit" to="OrdUnit"/>
      <Default from="Inactive" to="Inactive"/>
    </Defaults>
    <OnFailure>
      <SetError table="Detail" field="ItemNo"
        fromText="Order: '{DocNumber}': Item: '{Detail.ItemNo}' not found" />
      <Log level="Warning" message="Order: '{DocNumber}': Item: '{ItemNo}' not found"
        parameters="{Header.DocNumber}; {Detail.ItemNo}" />
    </OnFailure>
    <OnSuccess>
      <If.isTrue="Detail.InActive">
        <SetError table="Detail" field="Inactive"
          fromText="Order: '{DocNumber}': Item: '{Detail.ItemNo}' is InActive" />
        <Log level="Warning" message="Order: '{DocNumber}': Item: '{FmtItemNo}' is InActive"
          parameters="{Header.DocNumber}; {Detail.FmtItemNo}" />
      </If.isTrue>
    </OnSuccess>
  </If.isTrue>
```

**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.

```
<ForEachRow table="Detail" filter="[TxNo] = {Header.TxNo}" asVariable="Detail" >
  <OnEach>
    <If expression='DetailRow["OrdUnit"].ToString().Equals("LB")' >
      <SetRowField row="DetailRow" field="OrdUnit" fromText="KG"/>
    </If>
    <If expression='DetailRow["OrdUnit"].ToString().Equals("CA")' >
      <SetRowField row="DetailRow" field="OrdUnit" fromText="CS"/>
    </If>
  </OnEach>
</ForEachRow>
```

**Expressions:** can be used to evaluate and permit progress of the workflow, and/or as a test to set certain data fields.

```
<If expression="Primary.HasErrors">
  <ForEachRow table="Header">
    <OnEach>
      <SetRowField table="Header" field="BatchErrors" fromText="true" />
    </OnEach>
  </ForEachRow>
</If>
```

**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

**SAMLTD - O/E Host Interface Options**

File Help

Orders | Shipments/Invoices | Credits |

Imports | Exports |

Profile: OE Order Import (EnableTRANS) - 6.4 - 2021/06/05

Description: Import Sage 300 OE Orders from the Nexus Q. Supports Optional Fields.

General | Queue | Print | Recovery | Credit | EnableTRANS |

Use Sage 300 Transaction number?

Use hand held Transaction number as Reference?

Manual processing action: Saving only

Auto processing action: Save

System date for Posting Date?

System date for Order Date?

Set Logs as Auto-Reviewed?

**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.

EnableTrans.ETService (Instance: ExportTxsNXClient)	Export transactions from Sage ...	Running	Automatic
EnableTrans.ETService (Instance: ImportTxSage300)	Import transactions from the N...	Running	Automatic
EnableTrans.ETService (Instance: OnBoardToNX)	OnBoard Transactions To Nexus...	Running	Automatic
EnableTrans.ETService (Instance: TableSync)	SFOL to Sage 300 Table UPSERT	Running	Automatic

**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.

**SAMLTD - Order Import**

File Help

Import Profile: OE Order Import (EnableTRANS) - 6.4 - 2021/06/05 Sort by: App Tx

Queue Tx#	Order nu...	Description	Lines	Creation date
11158	1213456	RAWOrderTSVFlat12345-1213456	2	2021/03/07

Test Import  Auto Import Transactions?

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 to 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.

**SAMLTD - Log Browser**

File Help

Select Filters: Transactions: All, Levels: All, Methods: All

Actions: All, Processed: All, Reviewed: All

From: 07/10/2021 To: // App Tx

Mark As: In Review, Reviewed, Not Reviewed

Mark All As: Reviewed

View: Log, Order, QBrowser, Refresh

Highlight:  Not Reviewed  Error Level

Reviewed	Processed	Log Date	Log Time	Q Type	AppTx	Method	Action	Module	ERP Type	Document	Rev	QTx	Wam...	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				0	11107	2	0	0	ADMIN
No	No	7/12/2021	10:09:17	OE Shipm...	ORD0000112-1	Manual	Import				0	11107	2	0	0	ADMIN

## EnableTRANS-based, Transactional Html-templated Emails

Since their initial introduction, **OE Order Confirmations**, **Shipment Notices**, and **Invoice Delivery** Email Workflows 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.

### Full access and usage of to Customer Bill To, Ship To and Multi-Contact Email Addresses

To Email Address Source? *	Customer Email - AR
Cc Email Address Source? *	Customer Email - AR Customer Email - Order
Static Cc Email Address(es)?	Customer Contact Email - AR Customer Contact Email - Order
Static Bcc Email Address(es)?	Customer Multi-Contact Email - OE
*TEST* To Email Address?	ShipTo Email - AR ShipTo Email - Order ShipTo Contact Email - AR Ship To Contact Email - Order

### Broader support for source of Tracking Number(s)

The screenshot shows the 'SAMLTD - O/E Host Interface Options' window. The 'Tracking' tab is selected, and the 'Tracking Number Source' dropdown menu is open, showing options: None, Header Tracking Number (highlighted), Details Tracking Number, and Misc Charge Comments. Other tabs include General, Export Records, Selection, Report, EMail, EMail2, EnableTRANS, and NXLog.

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

The screenshot shows the 'SAMLTD - O/E Host Interface Options' window. The 'Tracking' tab is selected, and the 'Ship Via to Carrier OptField Lookup?' field is highlighted with a red box, showing the value 'CARRIERURLS'. Other fields include 'Include Sales Reps?' (No) and 'SalesRep Email OptField Lookup?' (SALESEMAIL). Tabs include General, Export Records, Tracking, Selection, Report, EMail, and EMail2.

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.

SAMLTD - Optional Fields

File Help

Optional Field: CARRIERURLS

Type: Text

Validate

Values

Value	Description
CCT	FEDEX
EPS	UPS
GFS	USPS
IAF	FEDEX

```

<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'**

Orders | Shipments/Invoices | Credits

Imports | Exports

Profile: OE Shipment Emler (EnableTRANS) - 6.4 - 2021/06/25

Description: Export Sage 300 OE Shipments, template, generate & send

General | Export Records | Tracking | Selection | Report | EMail | EMail2

Include Sales Reps? As Cc

SalesRep Email OptField Lookup? SALESEMAIL

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 Emler 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:

SAMLTD - Optional Fields

File Help

Optional Field: SALESEMAIL

Type: Text

Validate

Values

Value	Description
BB	BBhaisson@enablecore.com
DA	DTio@enablecore.com
DE	DEmerald@enablecore.com
DN	DNishiga@enablecore.com

Tue 7/20/2021 4:52 PM

dkellok@enablecore.com

**Order ORD0000114**

To: 'Mr. Ronald Black'

Cc: Bill Bhaission; David Sanjos

**Test mode for Emler runs**

General | Export Records | Tracking | Selection | Report | EMail | EMail2 | EnableTRANS | NX

Production Mode? Test Runs Only

Each Emler 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.

Orders | Shipments/Invoices | Credits

Imports | Exports

Profile: OE Order Emailer (EnableTRANS) - 6.4 - 2021/06/25

Description: Export Sage 300 OE Orders, template, generate & send Email.

General | Export Records | Tracking | Selection | Report | Email | Email2

Include Sales Reps? As Cc

SalesRep Email OptField Lookup? SALESEMAIL

Ship Via to Carrier OptField Lookup? CARRIERURLS

\*TEST\* To Email Address? test@enablecore.com

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

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](mailto: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

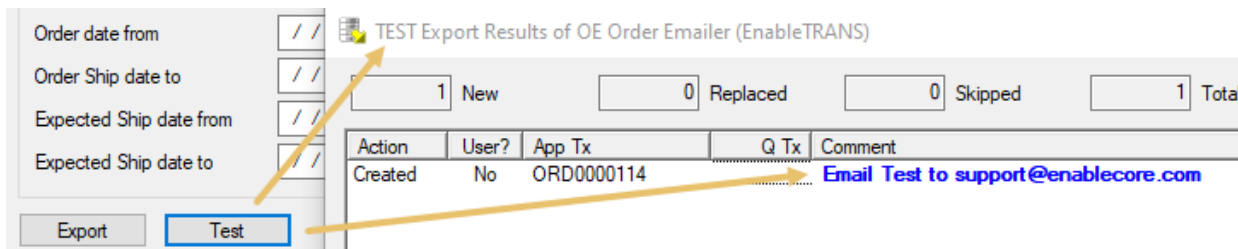
**PO#** 99987-01  
**Order#** ORD0000113  
**Order Date** Mar-07, 2021

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.

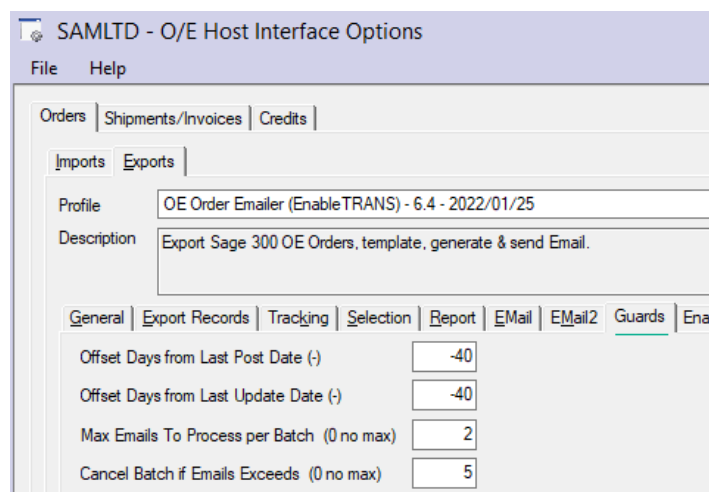
Test runs will also be logged and can be used to validate duplicate resends will be blocked.

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.



### Execution Guards to protect against sending errant emails and providing throttle for server

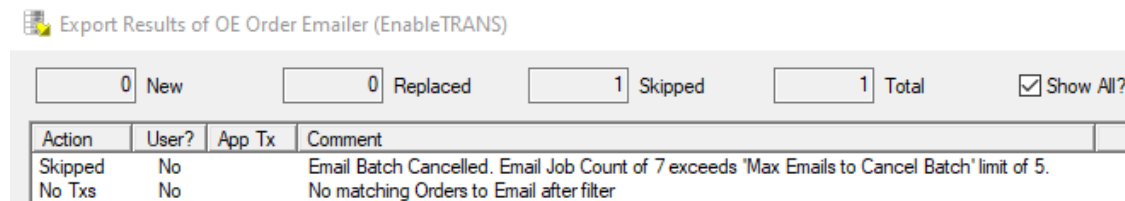


**(NEW)** Transactional emails tend to be triggered by an event such as a Post, update and/or system audit dates can provide for a 'minimum date floor' to evaluate against on whether to send and email. These dates values may / may not be available for all transaction types.

The 'Max Emails to Process per Batch' provides a throttle on the number of emails being sent from your email server, thus protecting against getting blocked by a provider.

The 'Cancel Batch if Emails Exceeds' provides a number that will cancel the Batch from running if the number of email jobs to be sent is beyond your expectations and probably indicates a problem with the criteria.

In both '0' will indicate that there is no limit.



### Combined Access to SQL Query, Transformation & Sage 300 Views for Template Data

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

In addition to SQL, emlers 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

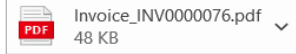


Sat 18/07/2020 4:48 PM

Enablecore Test <Invoices@enablecore.>

Your Enablecore Invoice # INV0000076

To Mr. Ronald Black  
Cc Enablecore Admin



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](https://www.123456789.com)

Thank You! Enablecore Technologies Inc.

**enable.core**

Reply Reply All Forward

dkellock@enablecore.com  
\*TEST\* Order ORD00000113

support@enablecore.com

### Sold To

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

### Ship To

Home office  
12 Elegant Drive  
Los Angeles, CA  
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