

Nexus 6.4.3 Upgrade Summary

Key Changes & Advancements:

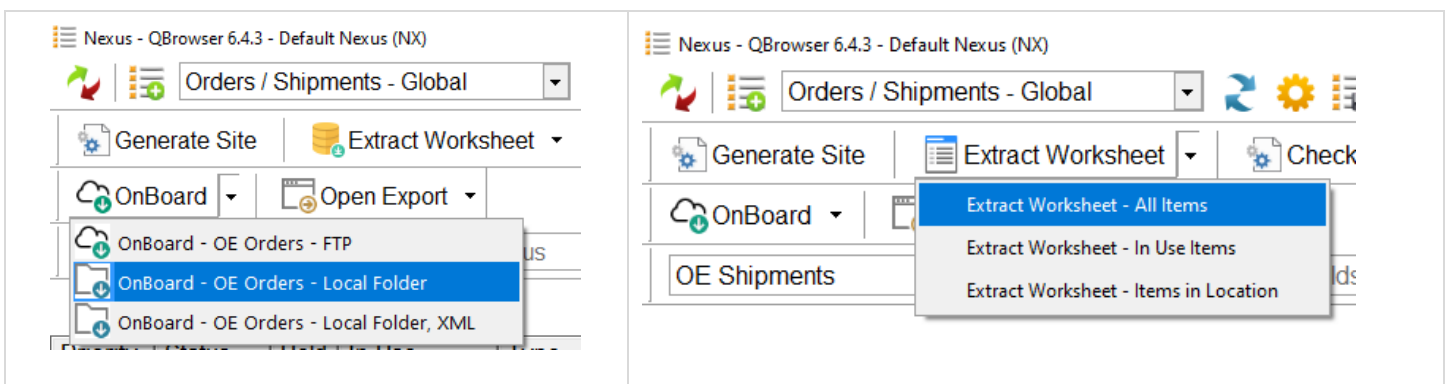
New Physical Inventory OnBoarding and Import to Worksheet Workflow Packages – powered by the EnableTRANS application automation framework, this release adds a long list of advancements in validation and variance reporting, at the earliest opportunity during the workflow.

- ✓ Includes best practices from cumulative Sage 300 and varied client workflow expertise
- ✓ Introduces optional OnBoarding workflow package to import from spreadsheet or flat files
- ✓ Increased workflow intelligence with advanced early validation and variance reporting, prior to import and posting
- ✓ Adds 'Extract IC Worksheet to spreadsheet' to identify qty and cost variance and 'postable' advice
- ✓ Reduces total time to conduct Stock Take / Physical Inventory and allows operations to resume earlier

	K	L	M	N	O	P	Q	R	S	T	U	V
1	Variance Qty Abs	Calculated Cost	Adjustment Cost	Cost Variance	Cost Variance Abs	Stock Unit	In Active	Allowed	In Use	Status	Postable	No Post Reason
68	0.00	0.00	0.00	0.00	0.00	Ea.	FALSE	FALSE	FALSE	On hold	FALSE	*Not Allowed*
69	0.00	70.1116	70.1116	0.00	0.00	Ea.	FALSE	TRUE	TRUE	On hold	TRUE	
70	0.00	0.00	0.00	0.00	0.00	Ea.	TRUE	TRUE	FALSE	On hold	FALSE	*Inactive*
74	2.00	0.00	0.00	0.00	0.00	Ea.	FALSE	TRUE	TRUE	On hold	TRUE	
76	0.00	24.606	24.606	0.00	0.00	Ea.	FALSE	TRUE	TRUE	On hold	TRUE	
77	0.00	0.00	0.00	0.00	0.00	Ea.	FALSE	FALSE	TRUE	On hold	FALSE	*Not Allowed*
78	0.00	0.00	0.00	0.00	0.00	Ea.	FALSE	FALSE	FALSE	On hold	FALSE	*Not Allowed* *Non Stock Item*

New OnBoard / OffBoard Packages, and Functional Advancements to existing – Nexus and EnableTRANS extends its rich feature set for export/import and off/on-boarding of data and transactions to/from 3rd Party Data Partners such as Managed EDI, external Manufacturing & Merchandising solutions, ECommerce, etc.

- ✓ Added support to write and read **xlsx spreadsheets**, featured in 'IC Worksheet' and 'OE Order Action' exports.
- ✓ Introduction of **SFTP endpoints** with private/public key support, and advanced FTP / FTPS
- ✓ Added support for endpoint folder aliases and **endpoint-specific settings & properties**
- ✓ Added **IC Receipt OnBoarding** to support 3rd party manufacturing systems
- ✓ **Advanced Pre-validations**, such as respect for IC Options which may override IC Item Details



Sage 300 v2023 Compatibility – Sage 300 (7.0A) compatibility is delivered as updated releases of the Nexus Host Interface modules and EnableTRANS Sage 300 Adaptor.

Order Action Detail Export to Spreadsheet, with optional Emailer – Export templated spreadsheet and optionally save to local folder, open spreadsheet, or email. Export as a single spreadsheet or partition by Customer, Salesperson or Ship-From Location.

SAMLT - O/E Host Interface Options

File Help

Orders | Shipments/Invoices | Credits

Imports | Exports

Profile: OE Order Action Offboard to Spreadsheet (EnableTRANS) - 6.4 - 2023/03/01

Description: OffBoard Sage 300 OE Order detail, enhance data and template as spreadsheet, store as file or optionally open.

General | Export Records | Selection | EnableTRANS | Formats

Include Empty Exp Ship Dates? Yes

Orders to Include: New and Backorders

Include OnHold Orders? Yes

Include Completed Orders? No

- Order Action Detail - Calculated Fields:*
- Pick Advice for Order – None, Part, Full
 - Ship-From Location Qty Buckets
 - All Ship-From Location Qty Buckets Ttl
 - Alternate Ship-From to fulfill Qty
 - Pending ETA for open PO with Qty

Order Date	Exp Ship	Lines	Wgt	Net \$	Pick Advice	Customer	Dtl Type	Detail	Item	Description	Category	Stock	Ord Qty	Unit	Backord	ShipFr Ttl Cmtd	ShipFr OnHand S
1/18/2022	1/18/2022	1	0.00	11.50	1100	1100	1	1	A1-320/0	50W/12V Halogen Bulb	A1	TRUE	2.00	Ea.	2.00	9.00	61.00
1/18/2022	1/18/2022	1	0.00	11.50	1100	1100	1	2	A1-320/0	50W/12V Halogen Bulb	A1	TRUE	2.00	Ea.	2.00	9.00	61.00
2/10/2022	2/10/2022	2	1.10	173.25	1100	1100	1	1	A1-400/0	Desk Note Book	A1	TRUE	11.00	Ea.	11.00	0.00	146.00
2/10/2022	2/10/2022	2	1.10	173.25	1100	1100	1	2	A1-123/0	test Non Stock	A1	FALSE	0.00	Ea.	0.00	0.00	0.00

From: Derek Kellock EC

To: 'Kathryn Winer' <kwiner@enablecore.com>

Cc:

Subject: RE: Order Action: Salesperson 'KW' RunDate: 20230308

Optional Order Action Email Partitioned by Customer, ShipTo, Salesperson, or ShipFrom Location.

If emailed, configuration determines correct contact.

Emails can carry spreadsheet as attachment or embed as html body.

THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL

Hello Kathryn Winer,

Please see the following or attached Order Summary showing your open orders.

** Open Orders **						
Order#	Cust	Order Date	Exp. Ship	PO#	Base Qty	Net Ttl
ORD000000087	1100	Jan-18, 2022	Jan-18, 2022	1234567	2	\$11.50
ORD000000088	1100	Jan-18, 2022	Jan-18, 2022		2	\$11.50
ORD000000091	1100	Feb-10, 2022	Feb-10, 2022		11	\$173.25
ORD000000092	1100	Feb-24, 2022	Feb-24, 2022	12345678	42	\$290.50
ORD000000106	1100	Jun-20, 2022	Jun-20, 2022		16	\$706.84
ORD000000108	1100	Jul-14, 2022	Jul-14, 2022		1	\$50.35
Totals					74	\$1,243.94

Data Syndication Package

Most clients using Portable Apps powered by the Nexus Client, are currently using an EnableTRANS 'DBExtract' Windows Service to extract data lookups to support validation on the mobile device. Many clients also leveraged this extraction workflow to supply data syndication for alternate 3rd party apps such as merchanding, EDI and Ecommerce sites.

To better fulfill production and delivery of more challenging data files EnableTRANS now offers a more robust data extraction workflow package that allows for both transformation and validation steps that reduce the complexity if attempting to deliver this via a SQL Query. These steps also provide access to the Sage 300 Views.

Delivery of these data lookups, in CSV, TSV, XML or xlsx formats can be FTP, FTP/S, or SFTP with key authentication.

Name	Description	Status	Startup Type	Log On As
Embedded Mode	The Embedded Mode service enables scenarios related ...		Manual (Trigg...	Local System
EnableTrans.ETService (Instance: DBExtract)	Extraction of flat files as DB Lookups for Nexus Client	Running	Automatic	Local System
EnableTrans.ETService (Instance: ETNexusDirector)	Monitor and Manage Nexus Q Transactions based upo...	Running	Automatic	Local System
EnableTrans.ETService (Instance: ExportTxsNXClient)	Export transactions from Sage 300 to the Nexus Transac...	Running	Automatic	Local System
Encrypting File System (EFS)	Provides the core file encryption technology used to st...		Manual (Trigg...	Local System



The Data Syndication package can allow for any number of different workflows for the delivery of groups of varied data files to different Data Partners. While there is an implementation effort for each, a single license is sufficient.

Nexus Sage 300 Host Interfaces

Added support for Sage 2023 (6.4A-7.0A) – latest releases

- **Nexus Services - (NX)** **6.4A R16**
- **Nexus Host Interface I/C - (PH)** **6.4A R27**
- **Nexus Host Interface O/E - (OQ)** **6.4A R25**
- **Nexus Host Interface P/O - (PQ)** **6.4A R26**
- **EnableTRANS (Sage 300 Adaptor)** **0.7.0.17+**

Host Interface Options & Import / Export Screen Improvements

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.

EnableTRANS Instances that are not Export/Import-related are now hidden

There are a growing number of EnableTRANS Instances to support workflow execution via Nexus QBrowser Actions, desktop shortcuts or automated via Windows Service. Any Instance not directly supporting an Import or Export UI panel is now hidden within the Nexus Host Interface Options, thus reducing selection errors in the Options.

SAMLTD - O/E Host Interface Options

File Help

Orders | Shipments/Invoices | Credits

Imports | Exports

Profile: OE Order Import (EnableTRANS) - OnBoarded Orders - 6.4 - 2021/11/07

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

Buttons: Set UI InActive, UI Default

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

Show debug console on run?

EnableTRANS Log Level: Verbose

EnableTRANS Instance: Sage 300 OE Order Import On-Board with Prevalidation

Additional Parameters?



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

Hide Auto Import check box

Host Interface Import Profiles have previously provided an Auto Import feature which would allow users to leave the panel open and any transactions would be auto processed. We consider this a legacy feature and by default hide this feature in the latest Host Interface profiles. It can be turned back on via a setting in the profile. Auto processing is now expected to be completed as a Windows service where it is handled much better with much less demand on Sage 300 system resources.

SAMLTD - Shipment Import

File Help

Import Profile: OE Shipment or Invoice Import, Fulfill with F | Sort by

Queue Tx#	Hold Until	Order number	Partner code
10237		ORD000000108-1	1100
10242		ORD000000110	1200

Buttons: Test, Import, Auto Import Transactions?

SAMLTD - Shipment Import

File Help

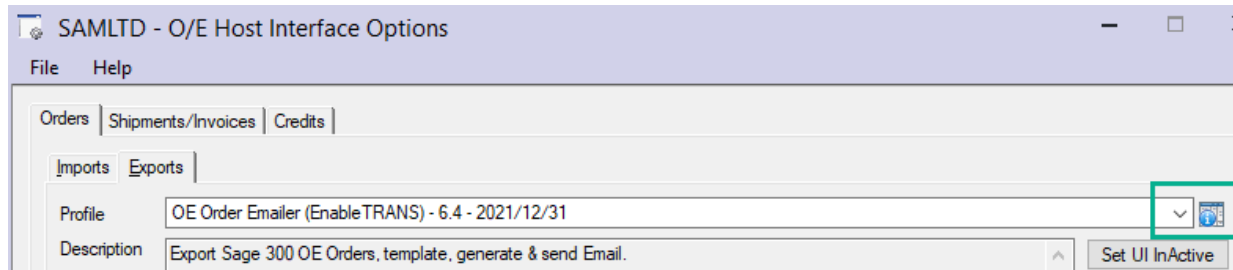
Import Profile: OE Shipment or Invoice Import, Fulfill with F | Sort by

Queue Tx#	Hold Until	Order number	Partner code
10237		ORD000000108-1	1100
10242		ORD000000110	1200

Buttons: Test, Import

Optional Export / Import Profile 'Html help files' now open in users Default Browser

Simple Html help files for each Export / Import / Email profile may be created to document specific use of options or client customizations. These html files need to be named with the same root name of the Export / Import profile and stored in the Company shared folder. When present, you will see the 'additional info' icon as noted below. Clicking that icon will now open the html page in your default browser.



Added - Added resizable export results form for all exports.

Fixed - Fixed an error on the Export Results screen related to the QBrowser button being available when there was no transaction in scope.

Fixed - False errors were generated on long Instance file names over 126 characters. This occurred in both import and export screens with EnableTRANS-based profiles.

Fixed - Fixed Finder corruption when switching between profiles with different finders in the selection fields of the exports.

Fixed - Fixed error when navigating between transactions in the Nexus Log. Navigation now moves the user to the correct next entry for the given QTx Number.



Fixed - Fixed 'Index out of range error' when trying to dump the Nexus Log to a file or copy to the clipboard.

EnableTRANS Framework: Added Features

As noted in several of the above updated workflow packages, core features have been added to EnableTRANS 0.7.17+

- ✓ Spreadsheet support for read / write of XSLX files.
- ✓ Introduction of Support for SFTP with key authentication, also upgrade of existing FTP & FTP/S end-points
- ✓ Robust inclusion for endpoint-specific settings and properties
- ✓ Internal build routines for packages to introduce automated scanning of instances and validation of assets

Community License for EnableTRANS – EnableTRANS is available as a community edition for use with several base and utility workflows.

<p><i>Available Community Edition Workflow Packages:</i></p> <ul style="list-style-type: none">- SQL to Flat Files – Generation of Flat Files via scheduled Windows Services and delivery to on domain folders.- Email Address Validation across selected Sage 300 or SQL fields- Extract Worksheet – Extract worksheet for audit / reconciliation assist- Order Action Export – Order Detail Extract as Spreadsheet	<p><i>Several packages can be upgraded as requirements advance, ie;</i></p> <ul style="list-style-type: none">- SQL to Flat Files >> 'Data Syndication' Package- Extract Worksheet >> IC Physical Inventory OnBoard/Import- Order Action Export >> Order Action Export with Partitioning, Emailer with intermediate Transformation Steps
	<p><i>Spreadsheet generation, Execution via Windows Service, and FTP endpoints are included. Implementation services and ongoing 'EnableCARE Support Contracts' are available.</i></p>
	<p><i>Sage 300 Adapter, Transformation Steps, Email and FTP/S, SFTP endpoint support require a full license.</i></p>

EnableTRANS – Available Workflow Packages

Emailers – Html Body, Include Reports, Carrier Tracking Links			
Action	Transaction	'Legacy'	'EnableTRANS'
Email	PO: Order Action	n/a	Y (new)
Email	OE: Order	n/a	Y
Email	OE: Shipment	n/a	Y
Email	OE: Invoice	n/a	Y
OnBoarding (From SQL, Flat / Heirarchial Files, XML Docs)			
Action	Transaction	'Legacy'	'EnableTRANS'
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 (new)
OnBoard	IC: Counts	n/a	Y (new)
OffBoarding (To Flat / Heirarchial Files, XML Docs, XSLX Spreadsheet)			
Action	Transaction	'Legacy'	'EnableTRANS'
OffBoard	IC: Worksheet	n/a	Y (new)
OffBoard	OE: Order Action – Header and/or Detail	n/a	Y (new)
Transaction Import / Export			
Action	Transaction	'Legacy'	'EnableTRANS'
Import	PO: Purchase Order	n/a	Y
Import	PO: Requisition	n/a	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	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.			