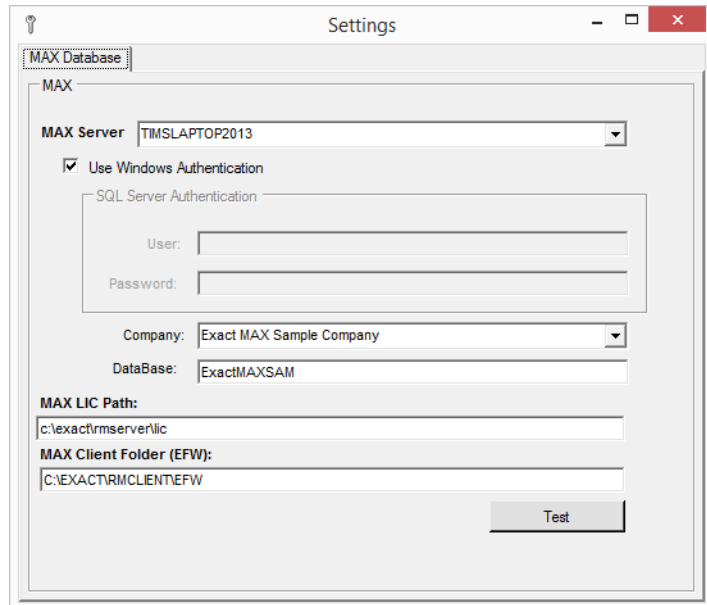
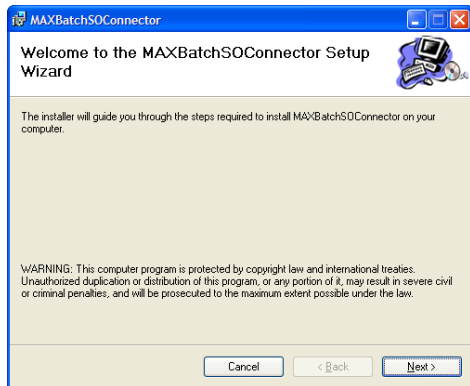

MAX Connectors: Batch Sales Orders

Batch SO Connector: loads XML Sales Orders or Quotes into MAX and exports open sales orders from MAX.

Requirements:

- 1) The SQL server name has to be the same name used to create the license hash.
- 2) We need to have 2 DLL's copied from MAX client folder into the application folder. The application tries to copy them if missing or old but sometimes is prevented and they will need to be manually copied:
 - a. C:\exact\rmclient\efw\ERMRemCl.dll
 - b. C:\exact\rmclient\efw\ EXACTRMEnc.dll
- 3) Make sure the MAX client runs on same PC. If MAX has an issue the application will also.
- 4) The application will try to add a temporary entry in the Path statement of the Environmental Variables which points to the MAX client folder in order to be able to "find" MAX. If there is a problem a message will display and this entry will need to be entered manually.
- 5) Sometimes 2 MAX DLL's need to be registered:
 - a. C:\exact\rmclient\efw\EXACTRMDEV.DLL
 - b. C:\exact\rmclient\efw\MAXUPDATEXML.DLL
- 6) The user referenced in the Data Settings needs read access to the EXACTMAX database
- 7) DotNet Framework version 4(Full) or newer

Installation: Run InstallMAXBatchSOConnector.exe and follow the prompts.



MAX Connectors: Batch Sales Orders

File Locations: locations for input and audit files as well as FTP parameters if using FTP.

File Locations

XML Locations

MAXSOWebOrders XML Path
C:\Projects\MAXSOBatchConnector\bin\XMLIN

MAXSOAudit XML path
C:\Projects\MAXSOBatchConnector\bin\AUDIT

MAXSOFeedBack XML path
C:\Projects\MAXSOBatchConnector\bin\FEEDBACK

FTP Parameters

Host Address: (s.g. ftp.mywebstore.com)

Path: (s.g. /Webstore/XMLOrders)

User ID:

Password:

List All Files

Main Form:

MAX (SQL Server) Batch Sales Orders v2015.0.0.2

Activity AuditView Export Open Preferences Send Orders to MAX Help

Send Orders every minutes.

Input Documents

- BadCustIDQuoteShortExample.XML
- LongExample.xml
- QuoteShortExample.XML
- ShortExample.XML

MAXOrder	CustomerPO	Customer	PartID	Quantity	Price	Value
----------	------------	----------	--------	----------	-------	-------

BPT\TimSchell | Exact MAX Sample Company | XML: _MAXSO\KMLPath | XML: ftp2.bmracing.com/MAXX/ORDERS

In manual mode click on the “Send Orders To MAX” button. The application will run unattended by passing an argument of “GO” in the command line. (...\MAXBATCHSOCONNECTOR.EXE GO)

The application will also check for new orders to send using the minutes entered on the form as an

MAX Connectors: Batch Sales Orders

Preferences:

To load customers into MAX. The Web Customer ID can be prefixed and have its numeric trailing portion padded by the number of digits specified.

In this example a Web Customer ID of "100" would be added to MAX as "WC_00100".

Defaults can be set up for Customer ID, Sales Account, COGS Account, Terms, Ship Via, Currency, and Lead Time.

This allows the Customer ID to be blank and if not using Accounts based on parts the accounts will default as entered.

"Export FeedBack", if checked will automatically generate an XML document containing all open MAX Orders. This document can also be generated as needed. It will be saved with a "\FeedBack" folder within the designated XML folder.

Loading Orders: all XML documents in the XML folder will be processed and then moved to a "\Processed" folder when the load process has complete and Audit XML document is saved in the "\Audit" folder within the designated XML folder. A summary of the loaded orders will be displayed from the Audit XML document.

MAXOrder	CustomerPO	Customer	PartID	Quantity	Price	Value
20001573	T N T PRO SHOP	CustID: WC_00400 : T N T PRO SHO...	119651150	1	3.55	\$3.55
			009199990	1	3.55	\$3.55
			009399990	1	3.55	\$3.55
					Order:	\$10.65
20001574	VIKING PRO SH...	CustID: WC_00400 : VIKING PRO SH...	119651160	1	3.55	\$3.55
			009199990	1	3.55	\$3.55
			009399990	1	3.55	\$3.55
					Order:	\$10.65
20001575	STRIKE ZONE	CustID: WC_00400 : STRIKE ZONE 6...	119651150	1	3.55	\$3.55
			009199990	1	3.55	\$3.55
			009399990	1	3.55	\$3.55
					Order:	\$10.65
20001576	OOPS ALLEY P...	CustID: WC_00400 : OOPS ALLEY P...	119651150	1	3.55	\$3.55
			009199990	1	3.55	\$3.55

Total at bottom of display:

MAX Connectors: Batch Sales Orders

Quote:

Quote 3 - 90000001

= exact **Quote**

Quote Number: 90000001 | Quote Date: 5/10/2013 | Customer ID: WC_AGI00100

Bill To: WALTHAM COMPANY
100 EAST SEAWAY LANE
WALTHAM
MAX
123456

Ship To:

PO Reference Number: | Terms: CASH ONLY | Ship VIA: EAST TEXAS MOTOR FREIGHT | F.O.B. Point: CHICAGO

Requested By: | Sales Representative: | Status: Open | Quote No.: 90000001 | Customer ID: WC_AGI00100

Line	DL	Order Qty	Part ID	Description/Notes	Unit	Unit Price	Ext. Price	Due Date
01	01	2.00	3015-DH		EA	0.320	0.640	10/01/2007
02	01	5.00	50217		EA	0.160	0.800	10/01/2007

Comments: | Order Notes... | Extended Fields | Total: \$ 1.440

Sales Order:

Sales Order 5 - 20001481

= exact **Sales Order**

Order Number: 20001481 | Order Date: 5/10/2013 | Customer ID: WC_00400

Bill To: T N T PRO SHOP
310 WEST 104TH AVENUE
NORTHGLENN
CO
80234
US

Ship To: T N T PRO SHOP
310 WEST 104TH AVENUE
NORTHGLENN
CO
80234
US

Customer PO Number: T N T PRO SHOP | Terms: 30 DAYS NET | Ship VIA: FIRST GENERAL | F.O.B. Point: SA, TEXAS-PP

Ordered By: ALEX R | Sales Representative: ULYSES MONROE | Status: Open | Order No.: 20001481 | Customer ID: WC_00400

Line	DL	Order Qty	Part ID	Description/Notes	Unit	Unit Price	Ext. Price	Due Date
01	01	1.00	119651150	THERMO COUPLE 200	EA	3.550	3.550	01/16/2006
02	01	1.00	009199990	FEROUS MAGNETIZER	EA	3.550	3.550	01/16/2006
03	01	1.00	009399990	ADVANCED MISTIFIER	EA	3.550	3.550	01/16/2006

Comments: AUTO ORDER ELITE JANUARY 2006 | Order Notes... | Extended Fields | Total: \$ 10.650

MAX Connectors: Batch Sales Orders

XML formats: all the documents have the same formats and elements. The two generated documents are:

- 1) Audit of Loaded Orders: [RMSOAudit.XML](#)
- 2) FeedBack of Open Sales Orders: [RMSOFeedBack.XML](#)

```
?xml version="1.0"?>
<eMAXExact xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="MaxWebData.xsd">
<SO_Master_Table>
  <SO_Master>
    <ORDNUM_27>200369</ORDNUM_27>
    <CUSTID_27>500 </CUSTID_27>
    <GLXREF_27>000410000 </GLXREF_27>
    <STYPE_27>CU</STYPE_27>
    <STATUS_27>3</STATUS_27>
    <CUSTPO_27> </CUSTPO_27>
    <ORDID_27> </ORDID_27>
    <ORDDTE_27>2005-01-24</ORDDTE_27>
    <SHPCDE_27>Disneyland</SHPCDE_27>
    <REP1_27>NW01 </REP1_27>
    <SPLIT1_27>100</SPLIT1_27>
    <REP2_27> </REP2_27>
    <SPLIT2_27>0</SPLIT2_27>
    <REP3_27> </REP3_27>
    <SPLIT3_27>0</SPLIT3_27>
    <COMMIS_27>0</COMMIS_27>
    <TERMS_27>01</TERMS_27>
    <SHPVIA_27>01</SHPVIA_27>
    <XURR_27> </XURR_27>
    <FOB_27>Shipping Point </FOB_27>
    <TAXCD1_27>ATLCITY</TAXCD1_27>
    <TAXCD2_27>COBCNTY</TAXCD2_27>
    <TAXCD3_27>GASTATE</TAXCD3_27>
    <COMNT1_27> </COMNT1_27>
    <COMNT2_27> </COMNT2_27>
    <COMNT3_27> </COMNT3_27>
    <SHPLBL_27>0</SHPLBL_27>
    <INVCE_27>N</INVCE_27>
    <APPINV_27> </APPINV_27>
    <REASON_27> </REASON_27>
    <NAME_27>Anaheim Distribution </NAME_27>
    <ADDR1_27>7207 La Sienega Avenue </ADDR1_27>
    <ADDR2_27> </ADDR2_27>
    <CITY_27>Anaheim </CITY_27>
    <STATE_27>CA </STATE_27>
    <ZIPCD_27>90117 </ZIPCD_27>
    <CNTRY_27>USA </CNTRY_27>
    <PHONE_27> </PHONE_27>
    <CNTCT_27> </CNTCT_27>
    <TAXPRV_27> </TAXPRV_27>
    <FEDTAX_27>N</FEDTAX_27>
    <TAXABL_27>Y</TAXABL_27>
    <EXCRTE_27>1</EXCRTE_27>
    <FIXVAR_27>F</FIXVAR_27>
    <CURR_27>US </CURR_27>
    <RCLDTE_27>0001-01-01</RCLDTE_27>
    <TTAX_27>0</TTAX_27>
    <LNETAX_27>N</LNETAX_27>
    <ADDR3_27> </ADDR3_27>
    <ADDR4_27> </ADDR4_27>
    <ADDR5_27> </ADDR5_27>
    <ADDR6_27> </ADDR6_27>
    <MCOMP_27> </MCOMP_27>
    <MSITE_27> </MSITE_27>
    <UDFKEY_27> </UDFKEY_27>
    <UDFREF_27> </UDFREF_27>
    <SHPTHRU_27> </SHPTHRU_27>
  </SO_Master>
</SO_Master_Table>

<SO_Detail_Table>
```

MAX Connectors: Batch Sales Orders

```
<SO_Detail>
  <ORDNUM_28></ORDNUM_28>
  <LNNUM_28>01</LNNUM_28>
  <DELNUM_28>01</DELNUM_28>
  <STATUS_28>3</STATUS_28>
  <CUSTID_28>500</CUSTID_28>
  <PRTNUM_28>11000</PRTNUM_28 >
  <EDILIN_28 ></EDILIN_28>
  <TAXABL_28></TAXABL_28>
  <GLXREF_28 ></GLXREF_28>
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  <QTLINE_28 ></QTLINE_28>
  <ORGDUE_28 > 2005-07-04</ORGDUE_28>
  <QTDEL_28></QTDEL_28>
  <CUSDUE_28 >2005-07-04</CUSDUE_28>
  <PROBAB_28>0</PROBAB_28>
  <SHPDTE_28>2005-07-04</SHPDTE_28>
  <SLSUOM_28></SLSUOM_28>
  <REFRNC_28></REFRNC_28>
  <PRICE_28 >100.55</PRICE_28>
    <ORGQTY_28>100</ORGQTY_28>
    <CURQTY_28>100</CURQTY_28>
    <BCKQTY_28>0</BCKQTY_28>
    <SHPQTY_28>0</SHPQTY_28>
  <CURSHP_28>0</CURSHP_28>
  <DUEQTY_28 >100</DUEQTY_28>
  <INVQTY_28>0</INVQTY_28>
  <DISC_28>0</DISC_28>
  <STYPE_28>CU</STYPE_28>
  <PRNT_28 >N</PRNT_28>
  <AKPRNT_28>N</AKPRNT_28>
  <STK_28></STK_28>
  <COCFLG_28></COCFLG_28>
  <FORCUR_28 >0</FORCUR_28>
  <HSTAT_28 >R</HSTAT_28>
  <SLSREP_28 ></SLSREP_28>
  <COMMIS_28 >0</COMMIS_28>
  <DRPSHP_28 ></DRPSHP_28>
  <QUMQTY_28>0</QUMQTY_28>
  <TAXCDE1_28 ></TAXCDE1_28>
  <TAX1_28 >0</TAX1_28>
  <TAXCDE2_28 ></TAXCDE2_28>
  <TAX2_28 >0</TAX2_28>
  <TAXCDE3_28 ></TAXCDE3_28>
  <TAX3_28 >0</TAX3_28>
    <MCOMP_28></MCOMP_28>
    <MSITE_28 ></MSITE_28>
  <UDFKEY_28 ></UDFKEY_28>
  <UDFREF_28 ></UDFREF_28>
  <DEXPFLG_28 ></DEXPFLG_28>
  <COST_28 >0</COST_28>
  <MARKUP_28 >0</MARKUP_28>
  <QTORD_28 ></QTORD_28>
</SO_Detail>
</SO_Detail_Table>
</eMAXExact>
```