

Connecting to a Sage 50 Accounts Product List

Overview

The Sage Stock (Products) table can be used as a source of Product information in QuoteWerks. This document takes you through the process in more detail step by step.

What you need to connect QuoteWerks to a Sage 50 Accounts Product list:

1. QuoteWerks installed on the user's PC.
2. Sage 50 installed on the user's PC.
3. Administrator privileges to allow you access the Control Panel Administrator Tools and create an ODBC System DSN Data Source.

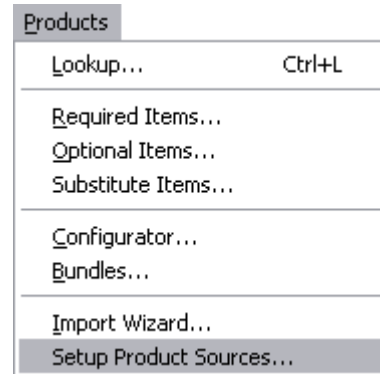
Note: Sage 50 Accounts will need to have been installed and the Sage ODBC DSN will need to be created on each user's PC that will be using the Sage Product list in QuoteWerks.

Depending on the version of Sage that you are using and the operating system on your PC / laptop, then there are two slightly different ways to set up the Sage 50 ODBC driver. You may be able to use just the default DSN (Data Source Name) that gets installed as part of a standard Sage 50 installation. If you experience problems setting up the QuoteWerks Product Data Source with this default DSN, then you may need to create a DSN to specifically link first. This document takes you through both options for configuring the Product Data Source – see Step 5 of the below Guide.

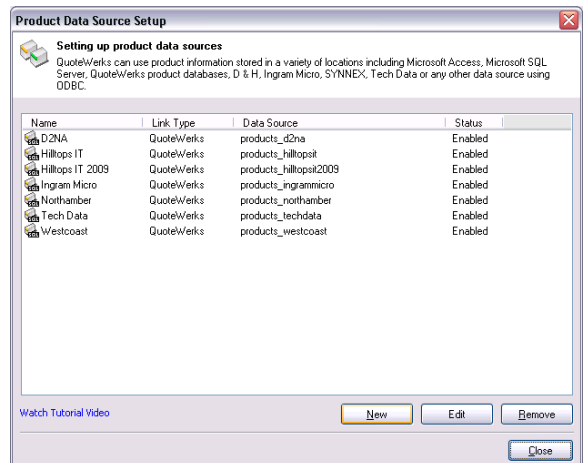
Setting up Sage as a QuoteWerks Product Data Source

Step 1: Open QuoteWerks.

Step 2: Click the QuoteWerks Products menu | Setup Product Sources option.

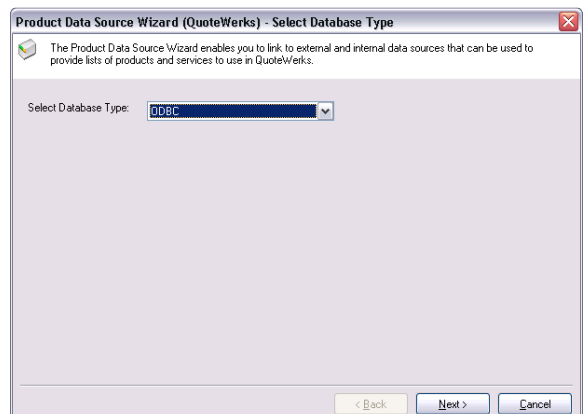


Step 3: Click the New button.



Step 4: Select ODBC from the "Select Database Type" dropdown.

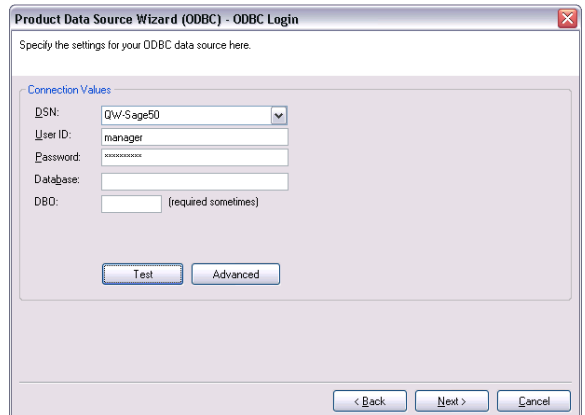
Click Next.



Step 5: Select the appropriate “DSN” ODBC driver (usually SageLine50vXX or the specific one that you have set up, see Notes below) from the dropdown. Enter your Sage “User ID” (login username) and “Password”. If using the default Sage DSN, then enter the “Database” path for the set of Sage accounts where the products are.

Note: the database path is the path into the Sage ACCDATA folder, so “C:\Program Files\Sage\Accounts\ACCDATA” or similar.

If you are using a specifically created DSN, then the Database name is not required.



Click Test – you should receive a message that “Connection values supplied are valid”. If you do not then double-check the details and try again. If you still get an error message, then you may need to set up a separate ODBC Data Source – please see the ‘Creating a specific DSN for your Sage 50 Accounts’ section at the end of this document.

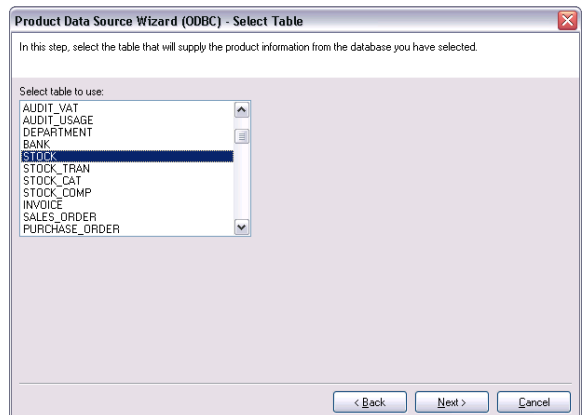


Click Next.

Step 6: Select the STOCK table.

Click next.

Note: this may take a moment to refresh while QuoteWerks retrieves the info from Sage.



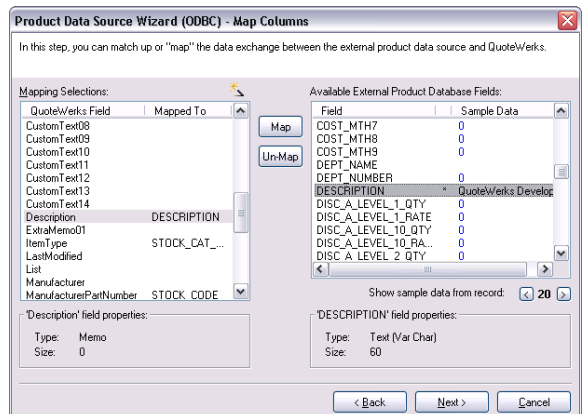
Step 7: map the appropriate columns by selecting the field name on the left, the field name on the right and clicking the ‘Map’ button.

As a guide, we recommend the following as a minimum:

ManufacturerPartNumber <-> STOCK_CODE
VendorPartNumber <-> SUPPLIER_PART_NUMBER
ItemType <-> CATEGORY_NAME
Description <-> DESCRIPTION
Cost <-> LAST_PURCHASE_PRICE
Price <-> SALES_PRICE
Availability <-> QTY_IN_STOCK

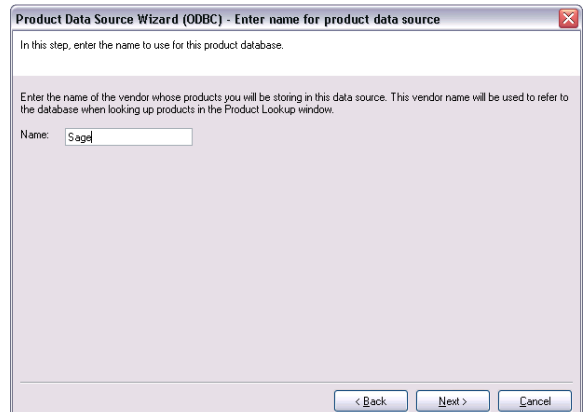
More (or less) columns may be mapped as required.

Click Next.



Step 8: Give the Product Data Source a "Name".

Click Next.



Product Data Source Wizard (ODBC) - Enter name for product data source

In this step, enter the name to use for this product database.

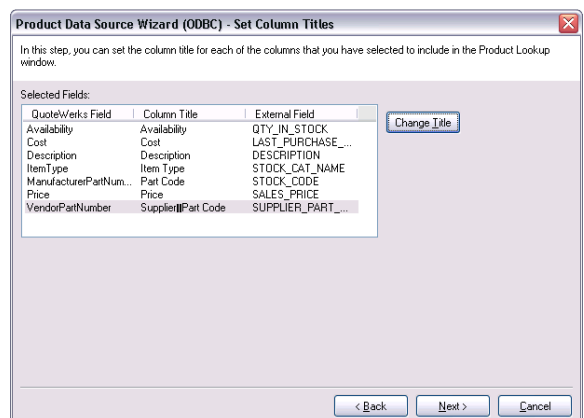
Enter the name of the vendor whose products you will be storing in this data source. This vendor name will be used to refer to the database when looking up products in the Product Lookup window.

Name:

< Back Next > Cancel

Step 9: if required, then change the column title for any field by selecting the field in the list and clicking the 'Change Title' button.

Click Next.



Product Data Source Wizard (ODBC) - Set Column Titles

In this step, you can set the column title for each of the columns that you have selected to include in the Product Lookup window.

Selected Fields:

QuoteWerks Field	Column Title	External Field
Availability	Availability	QTY_IN_STOCK
Cost	Cost	LAST_PURCHASE...
Description	Description	DESCRIPTION
ItemType	Item Type	STOCK_CAT_NAME
ManufacturerPartNum...	Part Code	STOCK_CODE
Price	Price	SALES_PRICE
VendorPartNumber	SupplierPart Code	SUPPLIER_PART...

Change Title

< Back Next > Cancel

Step 10: set up and Custom Menu Item options as required by clicking the 'Define Menu Items' followed by the 'Publish Menu Items' buttons; tick the 'Show all...' if required.

Click Finish.



Product Data Source Wizard (ODBC) - Finished

Click on the [Finish] button to save.

Product Lookup Custom Menu Items

You can setup custom menus that only display when you right click on an item in this Product Data Source.

Define Menu Items Publish Menu Items

Show all products/services when product source is selected.

< Back Next > Finish

Complete: close the Product Data Source Setup dialog; the Sage Product Data Source will now be available for all QuoteWerks users in the Product Lookup list.

Creating a specific DSN for your Sage 50 Accounts

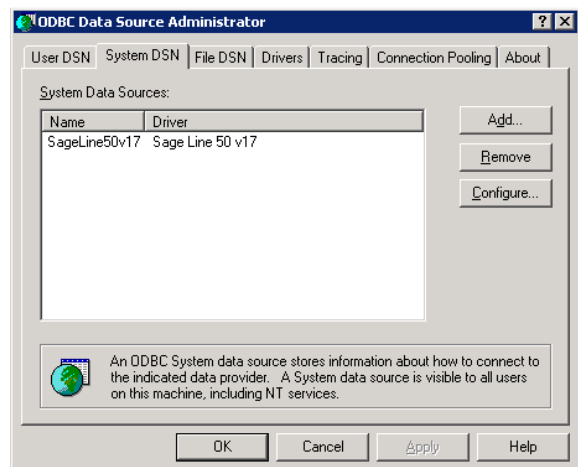
Ref. Step 5 of the above guide – some versions of Sage and/or the operating system that you are working with may require you to set up a specific DSN to work with applications that access them, such as QuoteWerks.

Note that these steps and screenshots are from Windows XP. Other operating systems may differ slightly as to how a new DSN is created.

Step 1: Open Control Panel | Administrative Tools | Data Sources (ODBC) option | System DSN tab.

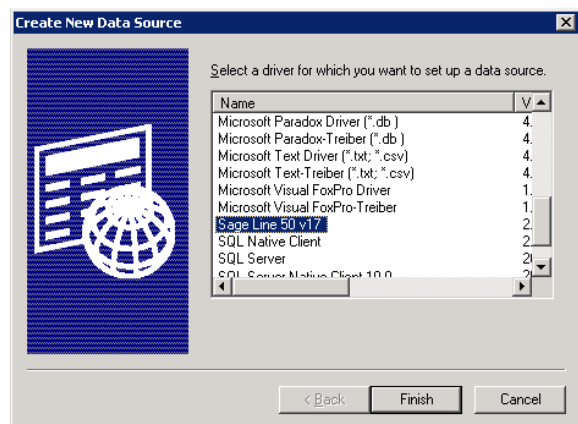
You should see (at least) the SageLine50vXX driver listed that gets installed by default as part of the Sage 50 installation. If you do not see this driver listed, then please consult your Sage support.

Click Add.



Step 2: scroll down and select the 'Sage Line 50 vXX' driver.

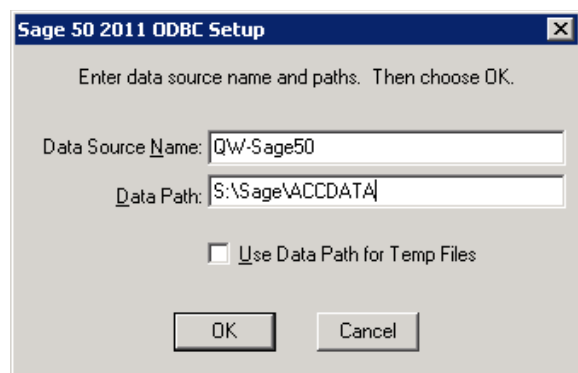
Click Finish.



Step 3: enter a Data Source Name and the Sage ACCDATA Data Path.

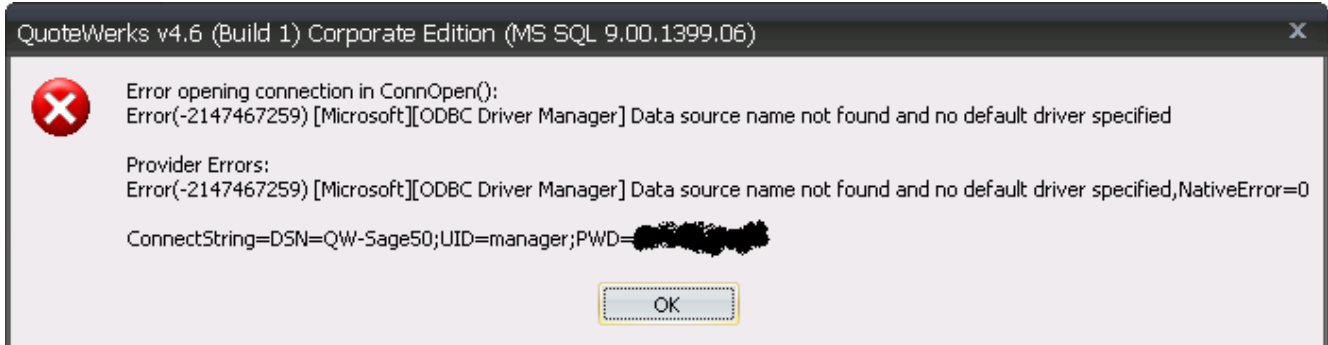
Note: the database path is the path into the Sage ACCDATA folder, so "C:\Program Files\Sage\Accounts\ACCDATA" or similar.

Click Ok.

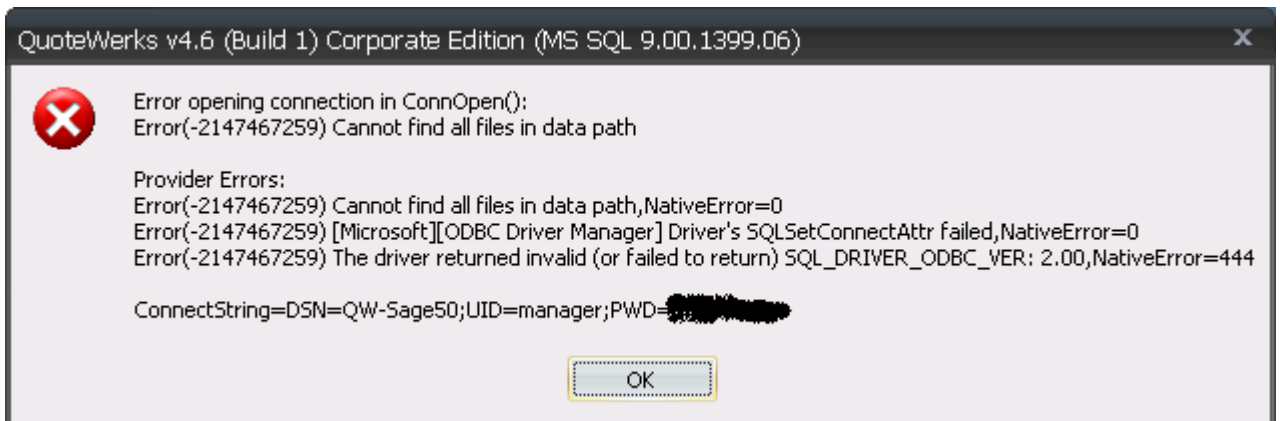


The new DSN will now be available for selection at Step 5 of the Step-by-Step Guide

Known “Gotchas”



- Check that the user has the ODBC DSN set up.



- Check that the user has access to the file / path that was set up in the ODBC DSN Step 5.