Skynamo

watch sales soar.

Skynamo Integration Client-Side Installation Guide

Sage Business Cloud Enterprise Management Integration

Version 2

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Capabilities

Currently Skynamo supports basic one-way integration of Customer, Product and Invoicing/Credit information from Sage Business Cloud Enterprise Management to Skynamo. This means that the Sage information is the master data-set and changes on Sage are synced to Skynamo. We also support basic Sales Order integration from Skynamo to Sage Business Cloud Enterprise Management, with an import template which can be adjusted to meet more client-specific needs.

Skynamo uses a copy of the standard Export web service (XXKYNEXP) with three custom export templates: Skynamo Customers (XXKYNBPC), Skynamo Products (XXKYNITM) and Skynamo Invoices (XXKYNSIH) to export data from Sage to Skynamo. We also make use of a copy of the standard Import web service (XXKYNIMP) and an import template, Skynamo Sales Orders (XXKYNSOH), to import Skynamo sales orders into Sage. These four templates and the two web services are provided in a patch which can easily be integrated with your current Sage EM (minimum V10) system. The web services and templates, provided in the patch, are protected by Skynamo's reserved Activity Code 'XXKYN' and will not interfere with any other custom Sage EM developments.

Customer integration

We currently support basic customer integration with multiple delivery addresses and pull the following fields from Sage EM into Skynamo:

- Sage Customer Code
- Sage Customer Name
- Sage Category
- Sage Group
- Sage Delivery Address
- Sage Contact Person
- Sage Telephone Number
- Sage Email
- Sage Fax
- Sage Mobile
- Sage Notes
- Sage Authorized Credit
- Sage Payment Term
- Sage Tax Rule
- Sage Sales Rep
- Sage Currency

Product integration:

We support basic product integration and pull the following fields from Sage EM into Skynamo:

- Sage Product Codes
- Sage Product Names
- Sage Category
- Sage Accounting Code
- Sage Item Weight
- Sage Product Base Pricing

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Invoice and Credit Note integration:

Invoices and Credit Notes are pulled from Sage EM to Skynamo and uploaded at line item level. The following info will be displayed for each invoice / credit note line:

- Customer
- Product
- Quantity
- Line total (including tax)
- Sage Invoice/Credit Note Number and Reference

Sales Order integration:

Sales Orders placed on Skynamo can be pushed back into Sage EM with some basic information. The information pushed back into Sage EM can however be extended/customized. The following fields are the standard sales order fields which are pushed back into Sage EM:

- Header Level:
  - Sales Site (Skynamo warehouse)
  - Order Type (SON by default)
  - Order Number (Skynamo order ID prepended with "SKY_SO")
  - Sold To Customer (Skynamo customer code)
  - Date (Skynamo order date)
  - Reference (Combination of Skynamo order ID and order reference if applicable)
  - Ship Site (Skynamo warehouse)
  - Currency (Skynamo customer currency)
  - Customer Delivery Code (Skynamo customer delivery code)
- Line item level:
  - Product Code (Skynamo product code)
  - Description (Skynamo product description)
  - Unit Quantity (Skynamo order quantity)
  - Unit Price (Skynamo unit price)
  - Disc (Skynamo overall order discount)

Getting Sage Ready

Step 1 – Integrating the Skynamo Sage EM Patch

Ensure that you are logged into Sage EM with an admin user who has the correct permissions to integrate Patches.

1. Navigate to Development > Utilities > Patches > Patch integration.
2. As 'Destination type', select 'Client'. Ensure that the 'Patch integration' check box is ticked and all other check boxes unticked.
3. Under 'Folders' select only the Folder you would like Skynamo to integrate with and remove all other folders from this list.
4. Click OK. Click on the Select file link and navigate to the patch file (SRC_XXKYN_001) provided by Skynamo. Click OK.

The patch should now integrate and validate automatically.

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Step 2 – Create and configure the pool for the Web services

Ensure that you are logged into Sage EM with an admin user who has the correct permissions to configure pools for web services.

1. Access '*Classic SOAP pool configuration*' from the Administration > Administration block.
2. Click Create soapClassicPool
3. Enter the following information:
   a. Alias: WSSKYNAMO
   b. Auto start: Yes
   c. Maximum size: 2
   d. Initial size: 2
   e. Endpoint: Select the endpoint you would like to use (e.g. X3)
   f. Locale: EN-US
   g. User: Select the user Skynamo will be using to access your web services.
4. Click Save.

Step 3 – Publish the Export Web Service required by Skynamo

Ensure that you are logged into Sage EM with an admin user who has the correct permissions to publish web services.

1. Navigate to Development > Script dictionary > Scripts > Web services.
2. As 'Publication name', type in 'XXKYNEXP'. The details in the screen below should automatically populate after this.
3. Click on the Publication button on the right-hand side of the screen. After clicking this button, the 'Published on' value should update and the 'Program' field should show 'WJXXKYNEXP'.
4. Repeat the process for the Import web service 'XXKYNIMP' if you require sales order integration between Skynamo and Sage EM.

Step 4 – The hand over

Finally, you will need to hand over the setup to the Skynamo integration team or reseller.

You will be required to provide the following details:

1. Public IP of your Sage EM web server
2. Port used to access Sage EM on this server (the default is '8124')
3. The language code used in Sage EM (usually 'ENG')
4. The name of the Pool set up in step 2 (preferably the default 'WSSKYNAMO')
5. The username and password of the Sage EM user which Skynamo will be using to access the web services.

Skynamo will also provide the static public IP of the server used to access the Sage Web Services. Please ensure that this IP is whitelisted by the firewall on the web server.

The rest of the installation will be completed and maintained by the Skynamo integration team or reseller.

That's it!
Say Hello to
Skynamo!