

Visual Streamline 3M Point of Sale Integration



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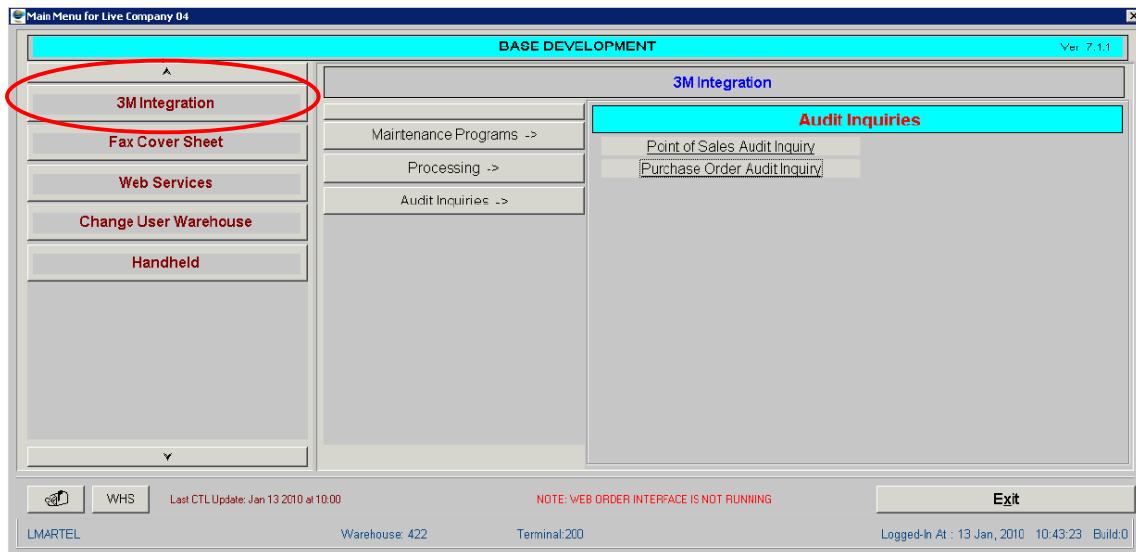
SETUP Requirements

Modules – New module added for 3M integration, this must be turned on to make the menu options visible.

Rights – New right added called ‘Right to 3M Integration’ (RT3MINT). This right must be assigned to applicable users.

MENU Changes

Here are the additional menu options visible when the module is turned on and the rights assigned to the user.



3M Control File Maintenance (3M Integration > Maintenance Programs > 3M Control File Maintenance)

This program is used to maintain setup information.

3M Supplier Code – The supplier code(s) used for 3M must be entered here. With respect to the point of sales export, only the invoice line items with a matching supplier code will be included on the export. With respect to the purchase order export, only purchase orders with matching supplier codes will be exported.

3M Distributor ID – 3M supplies this code to each distributor. The code is required for exporting POS data.

Use Supplier Part Number – If a supplier part number has been saved in the supplier information table for the listed vendors and this flag is turned on, the point of sale report and purchase order files will refer to that number. If not, then your product code will be used.

Export Directory – Location on disk that will be used to store the exported data files. Note: You must not include the trailing '\ ' on the directory name.

Historical Directory – Location on disk that will be used to keep exported files which have been transmitted to 3M. Once the file is transmitted and accepted, the file can be manually moved to this directory, so the export directory consists of only files not yet transmitted to 3M.

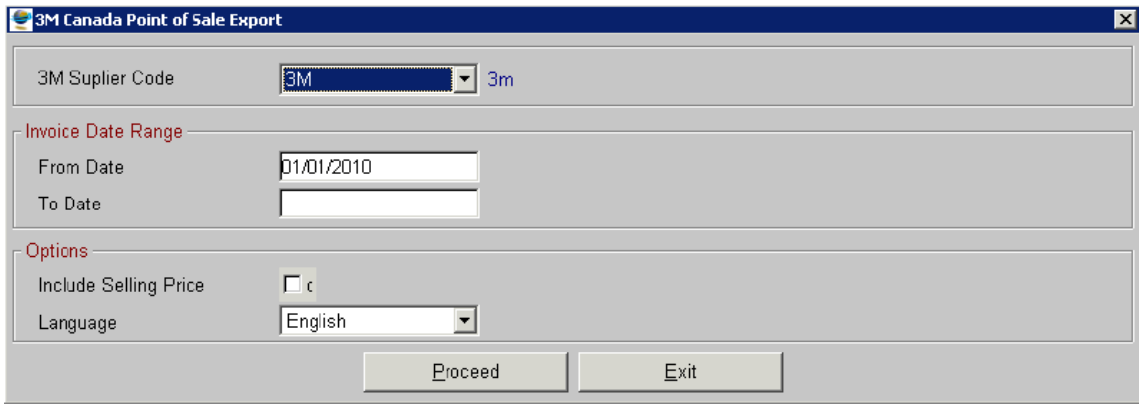
Available in Version 10.2.2.000 and higher:

Cost Option – this field is available in version 10.2.2.0000 and higher. The Cost Option field enables you to select either 'Average Cost' or 'Last Purchase Cost'. The default setting for this 'Cost Option' dropdown can be set in 3M Integration > Maintenance Programs... > 3M Control File Maintenance.

Selecting the 'Average Cost' option will perform the pre-existing functionality prior to version 10.22.000.

Selecting the 'Last Purchase Cost' option will use the purchase cost from the most recent purchase order prior to each record's invoice date (not order date), the UOM will be the purchase UOM, and all figures will be converted to that UOM. Additional information related to the Cost Option set to Last Purchase Cost is listed below:

- The Selling UOM is converted to show Purchasing UOM
- The selling quantity is converted to the same Purchasing UOM
- Cost is shown in Purchase UOM
- Sell Price will also be converted to purchasing UOM (if "Include selling price" option is selected).
- To accommodate the 4 decimal places for Quantity field, the Field 25 in the exported document has been increased to 15 characters.
- Since the data in the 3M exported file is tab delimited, the increase in field length should not affect you.

Point of Sale Export (3M Integration > Processing > Create Point of Sale Export)

3M Canada Point of Sale Export

3M Supplier Code: 3M 3m

Invoice Date Range

From Date: 01/01/2010

To Date:

Options

Include Selling Price: c

Language: English

Proceed Exit

3M Supplier Code – Select from supplier codes setup in control file above

From Invoice Date – Starting invoice date for export (defaults to first day of month)

To Invoice Date – Ending invoice date for export (defaults to last day of month)

Include Selling Price – Turn off if the point of sale export should include selling price to customer

Processing Notes:

This program scans all invoices posted to GL within the date range supplied. All products where the primary supplier matches the 3M supplier code will be included.

The naming convention used for export filename is as follows:

3M_POS_ + current date + counter + .txt

Example: 3M_POS_20040325_00.txt ... If an export is done on the same day, the counter is incremented by 1, so it will become 3M_POS_20040325_01.txt.

An audit file is written at the end of the export.

Purchase Order Export

The purchase order export is triggered automatically when a purchase order is printed where the supplier code on the purchase order matches the 3M Supplier Code as defined in the control file above. The export file is automatically created in the export path defined in the 3M control file table.

P/O export naming convention:

3M_ORD + purchase order number + _ + current date + _ + counter + .txt

Example: 3M_ORD00009825_20040325_00.txt... If the purchase order is reprinted on the same day, the counter is incremented by 1, so it will become 3M_ORD00009825_20040325_01.txt

Audit Inquiries (3M Integration > Audit Inquiries)

Export Date	Time	User	From Date	To Date	Export File Name
Mar 25, 2004	10:48	TDOL	Mar 24, 2004	Mar 31, 2004	3M_POS_20040325_01.txt
Mar 25, 2004	10:46	TDOL	Mar 24, 2004	Mar 31, 2004	3M_POS_20040325_00.txt
Apr 23, 2004	12:13	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_12.txt
Apr 23, 2004	12:05	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_11.txt
Apr 23, 2004	11:57	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_10.txt
Apr 23, 2004	11:55	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_09.txt
Apr 23, 2004	11:54	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_08.txt
Apr 23, 2004	11:53	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_07.txt
Apr 23, 2004	11:51	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_06.txt
Apr 23, 2004	11:49	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_05.txt
Apr 23, 2004	11:45	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_04.txt
Apr 23, 2004	11:44	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_03.txt
Apr 23, 2004	11:40	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_02.txt
Apr 23, 2004	11:30	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_01.txt
Apr 23, 2004	11:24	TDOL	Mar 01, 2004	Mar 31, 2004	3M_POS_20040423_00.txt
Aug 27, 2004	14:13	TDOL	Jun 01, 2004	Jun 30, 2004	3M_POS_20040827_03.txt
Aug 27, 2004	14:12	TDOL	Jun 01, 2004	Jun 30, 2004	3M_POS_20040827_02.txt
Aug 27, 2004	14:09	TDOL	Jun 01, 2004	Jun 30, 2004	3M_POS_20040827_01.txt
Aug 27, 2004	14:08	TDOL	Jun 01, 2004	Jun 30, 2004	3M_POS_20040827_00.txt
Jul 05, 2005	14:14	TDOL	Feb 01, 2005	Feb 28, 2005	TEST_3M_POS_20050705_00.txt
Jul 05, 2005	14:12	TDOL	Jan 01, 2005	Jan 31, 2005	TEST-3M_POS_20050705_00.txt

Audit files for both the purchase order export and the point of sales audit are kept. From the listing, simply select a file and click on the View Details button.