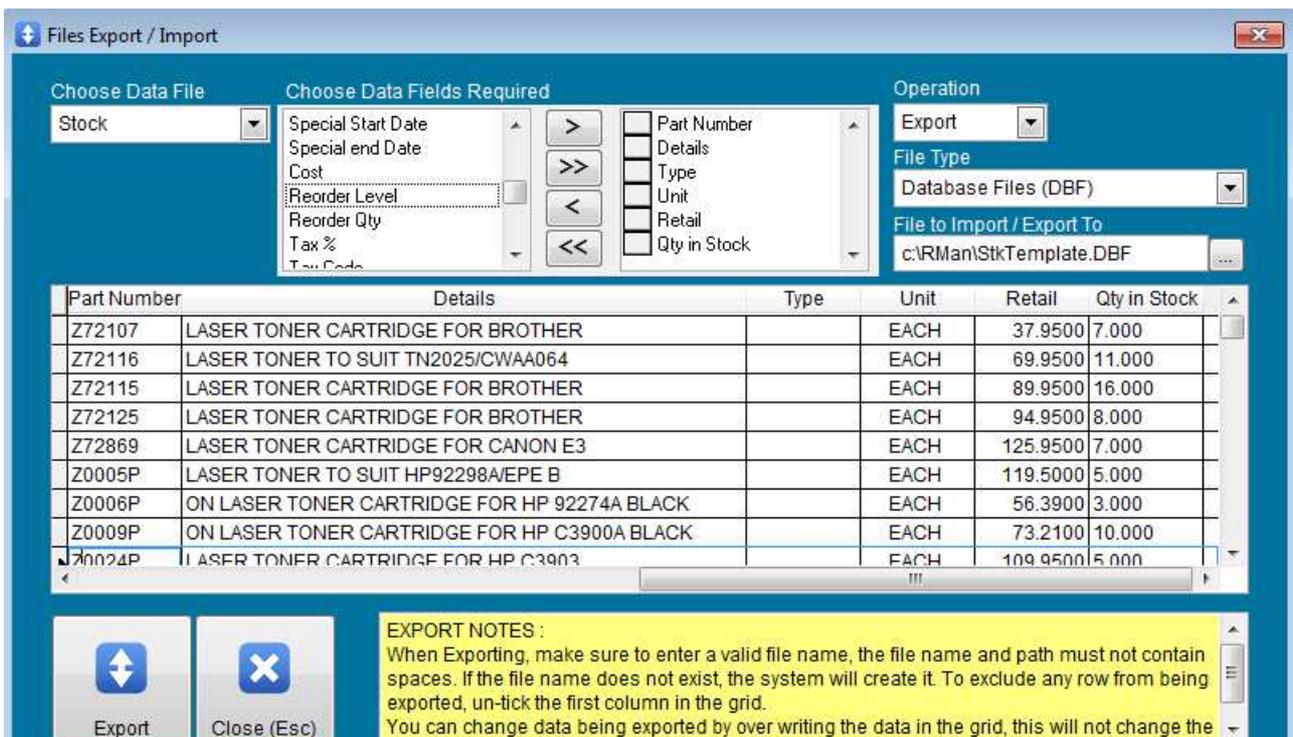# EziSolution WebLink

Purpose: EziSolution WebLink are a group of utility programs designed to link EziSolution software programs to the web. This is useful for businesses that run EziSolution Programs in house (Such as Retailman POS, EziSolution Invoicing, Ezi Accounting etc.) and also have a web site to sell their products or services.
WebLink is used to automatically upload stock data to the user's web site and download sales data from the user's web site back to the EziSolution programs to help control the business in a much faster and more efficient way.

EziSolution WebLink consists of the following programs that can perform the different functions needed to accomplish the stated task. They are listed in the order of setting up.

The first step is to create a stock template file that lists the fields you need to upload in the correct order. Once you decide what information is needed and in what order, you need to go to Maintenance > Files Export/Import and export the stock data you need to a template file (you can save it on any folder of your choosing and name it a meaningful name) but note the file type MUST be a dbf file type.
Note that we are only interested in the field headers and not the data itself (for now), so make sure you include all the required fields and in the order needed.

Once you press the Export button, the program creates the required template file that will be used in the FTP upload setup section, this is the very first and important step of your setup.

WebLink Setup: The main setup screen for EziSolution WebLink is contained in the main program used by the business, such as Retailman POS or Ezi Accounting, to open the setup screen, go to Maintenance > System Setup > Web Link Tab
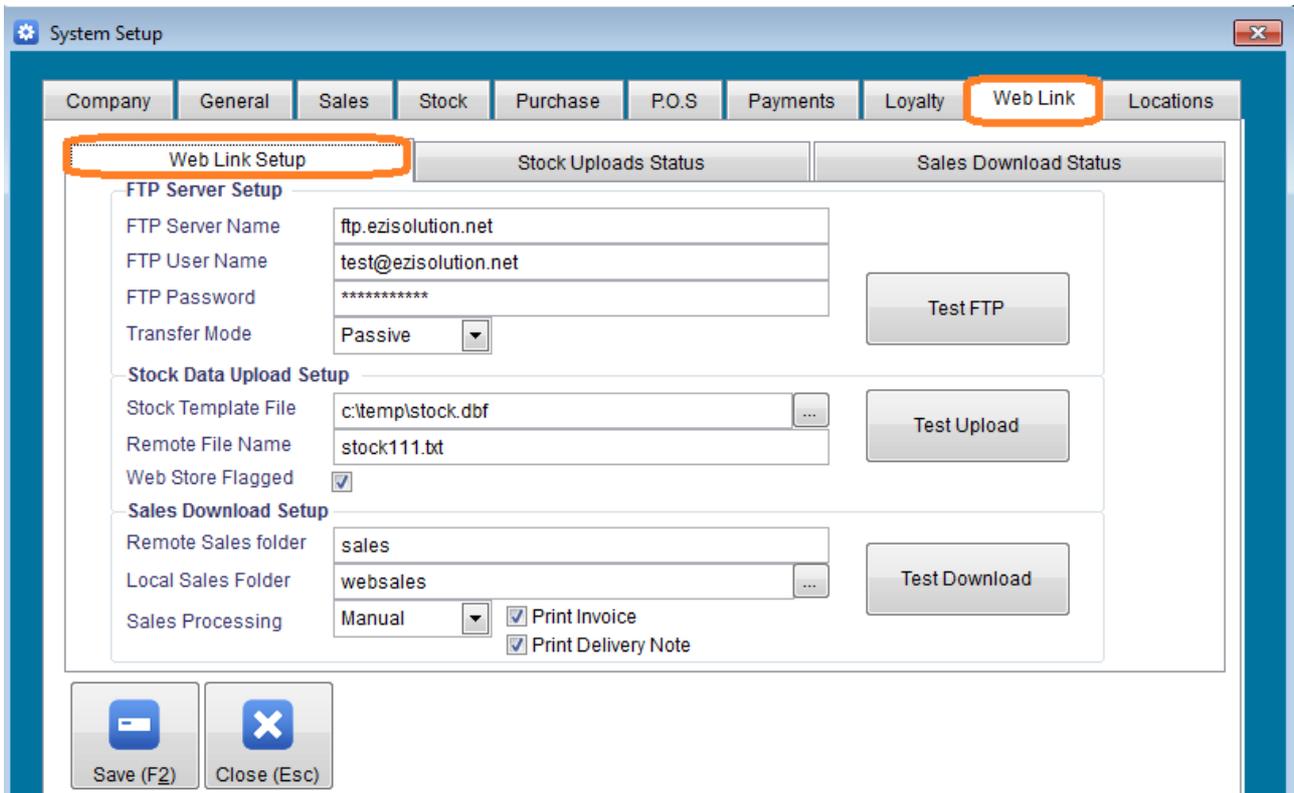
To setup WebLink properly, you need to have an FTP server running on your web site where you have setup your web sales and your stock file. You also need to know the ftp server name, user name and password.

1 - FTP Server Setup:

FTP Server Name: Enter your FTP server name such as ftp.myftp.com
FTP User Name: Enter the FTP user name such as john@myftp.com
FTP Password: Enter the FTP password
Transfer Mode: Choose between Active or Passive mode

Once you have entered the required information, you can test your FTP setup by pressing the Test FTP button, the system will try to connect and then report back the status if connected successfully or failed to connect.

Failure to connect can be caused by a number of reasons including the incorrect ftp server name, user name or password, or the wrong transfer mode (Active or Passive), you can also have a fail if you do not have access rights to the ftp server.

2 - Stock Data Upload Setup:

Stock Template File: Enter the stock template file that was created in the Files Export/Import screen
Remote File Name: Enter the file name as needed on the FTP server. Note that the file name MUST

include its extension type which will decide the way the stock data is uploaded to the FTP server. The valid extension types are XLS, CSV, TXT and XML. We highly recommend using either the CSV or TXT (Tab delimited text file) due to their small size (hence faster transfer) and easier to handle. We do not recommend using XML type stock file uploads for large stock files due to the overheads that are added to the xml file which will mean a very long upload time.

Valid file name examples are:

MyStock.XLS (for Excel type)
MyStock.CSV
MyStock.TXT
MyStock.XML

Web Store Flagged: Tick to upload all stock items that have their web store flag ticked on the stock card, unticking this option will upload all of the stock file items to the web.

Once you enter the correct data, you can test the stock file upload by clicking the Test Upload button, the uploaded file will contain a small sample of the stock file so the test is done quickly. The response should be back within a minute or so, depending on the transfer speed of your system and internet connection.

3 - Sales Download Setup:

This step is necessary if you wish to download the sales data from your web site back to your local system to enable the local EziSolution program to assimilate your web sales in to your local database.

If you do not want to download the sales data, you can just skip this section, otherwise, you will need to setup the following fields:

Remote Sales Folder: Enter the remote folder name you are importing your sales data from. If you will be downloading the sales data from the top folder, then just leave blank.

Local Sales Folder: Enter the name of the local folder you need the downloaded sales data to be stored in, we recommend using a folder inside your EziSolution program, to do that, just enter the folder name such as WebSales\. Note that if the folder does not exist, the program will try to create it for you.

Sales Processing: Choose Manual if you want to process the paymant manually, or Automatic if you wish to let the system import the data directly as it sees it available in the local sales folder.

Print Invoice: Tick to cause the system to print the imported sales data as invoices with each separate sale printed on its own invoice. The printing will be done on the Windows Default Printer

Print Delivery Note: Tick to cause the system to print a delivery note for each downloaded sale that has been processed. The printing will be done on the Windows Default Printer.

To verify the Sales download setup is correct, press the Test Download button to check. Note the test will only test the download section but will not import or print any data.

Stock Upload Status: The stock upload status tab will display the uploaded stock file status

including the start date and time, and if the upload was a success or a fail.

Sales Download Status: The sales download status tab will display the status of the downloaded files.

DownloadSales.exe: This is a stand alone program that needs to be run to download the sales data from the FTP server, it can be run interactively or included in the Windows Scheduler to run at certain times of the day such as every half an hour or one hour. It will run in the background with the option of showing feedback or run silent.
Make sure you allow enough time between downloads to make sure there is no conflict.

The downloaded sales data must be in an XML file format and must follow the exact format (note you can remove lines that are not needed in the data fields), these files need to be generated by the web store, so you will need to talk to your web designer and give them the file format so they can generate these files for you.
Each sale must generate a separate xml file and the file name need to have a meaningful name such as YYYYMMDDHHMMSSNNNN.XML where YYYY is the year, MM is the month, DD is the day, HH is the hour, MM is the minutes, SS is the second and NNNN is the sale number for that day (example of the file name 201402052345120016.xml for year 2014, month 02, day 05 time 23:45:12 and sale number 16 for that day)

Usage: **DownloadSales.exe "Silent" "Station_Number"**
Silent : this is an optional parameter to suppress any user feedback while running. Optional values are .T. for user feedback (Default) or .F. for suppressing user feedback.
Station_Number: An optional station number (default=1)

The XML file data should follow the example below:

```
<?xml version = "1.0" standalone="yes"?>
<!-- must have one file per sale, file name can be
YYYYMMDDHHMMSSNNNN.xml for year, month, day, time, sale sequence
number for that day such as 201401311259010005.xml>
<!-- Can remove none required fields but make sure you include the required fields
such as codes, names, qty and price>
<Sales>
     <debtors>
          <code>Client Code</code>
          <prefix>Saluation such as Mr. Mrs. etc.</prefix>
          <name>Client Name</name>
          <firstname>Client First Name</firstname>
          <surname>Client Surname</surname>
          <dob>Date of Birth YYYYMMDD</dob>
          <address1>Address Line 1</address1>
          <address2>Address Line 2</address2>
          <suburb>Suburb</suburb>
          <state>State</state>
```

```
        <postcode>Postcode</postcode>
        <country>Country</country>
        <address3>Delivery address/notes </address3>
        <phone>Client Tel number</phone>
        <fax>Client Fax Number</fax>
        <mobile>Client Mobile</mobile>
        <email>Client email address</email>
        <www>Client Web Address</www>
        <contact>Contact Name</contact>
        <note>Notes line 1</note>
        <note1>Notes Line 2</note1>
        <loyalty>Loyalty enabled .t.=True, .f.=False</loyalty>
    </debtors>

    <payment>
        <paid_by>1=cash, 2=Credit card etc.</paid_by>
        <amount>amount paid</amount>
    </payment>
    <payment>
        ... (if more than one payment method is used, then add more payment
sections)
    </payment>

    <invoice>
        <number>Invoice number (leave 0 or blank for Rman to assign a
number)</number>
        <status>'P' for paid, blank for outsanding (optional)</status>
        <type>'SI' for sales invoice optional</type>
        <inv_time>time in seconds since midnight</inv_time>
        <date>date in format yyymmdd 20080701</date>
        <reference>reference text (up to 20 characters long)
optional</reference>
        <amount>total invoice amount (required)</amount>
        <rounding>Rounding if any 0.000</rounding>
        <paid>Total Amount Paid (required)</paid>
        <tax>Total Tax Amount (required)</tax>
        <tax1>2nd Total Tax Amount (optional)</tax1>
        <taxinc>Tax Inclusive .t.= True or .F.=False(Required)</taxinc>
        <salesman>Salesman index number (if not supplied, 1 will be
used)</salesman>
        <shop>Location number (if not supplied 1 will be used) if not multi-
location, then always 1</shop>
        <cur_code>Currency Code (optional)</cur_code>
        <cur_rate>Currency Rate (optional)</cur_rate>
        <station>Station number (1 to 999) optional, 1 will be used if not
```

supplied</station>


```
        <sourcecode>Source Code (optional) such as 'WEB'</sourcecode>
        <points>Total reward points</points>
    </invoice>

    <!--must have as many invtrans entries as there are items on the invoice>
    <!--If there is a shipping charge, it needs to be added as a line at the end of the
invtrans entries>
    <invtrans>
        <part_no>Item Part Number (blank for notes)</part_no>
        <details>Stock Item Details (Required)</details>
        <qty>Quantity sold (Required)</qty>
        <amount>Line Amount (price x quantity)</amount>
        <discount>total Line Discount Amount</discount>
        <taxamount>total Line Tax Amount</taxamount>
        <taxcode>Tax Code</taxcode>
        <taxamount1>2nd Tax Amount</taxamount1>
        <taxcode1>2nd Tax Code</taxcode1>
        <taxinc>Tax Inclusive .t.=True, .F.=False</taxinc>
        <points>Line Reward Points</points>
    </invtrans>
    <invtrans>
        ...
        ...
    </invtrans>
</Sales>
```

UploadStock.exe: This is a stand alone program that can be run just by clicking on it, or it can be included in the Windows Scheduler to run at a certain time during the day.
We recommend this program is setup to run after work to update the stock data on your web site.

This program can be run as many times during the day as you require but once a day should be more than sufficient.

You web site programmer will be able to let you know what stock data fields are needed, the format needed and the frequency of uploads.

*Usage:* UploadStock.exe "Silent" "Station_number"

You can add two optional parameters to control the behaviour of the program.
Slient: Run the program in the background with no user feedback
Station_number: Enter the station number (default=1)

How to Automate the stock file uploads and web sales downloads.

You can use the Windows Scheduler to automate the process, you can set up the uploads and download at set times of the days to do the upload and download. Below are screen shots of how to automatically upload the stock file at 12:00am every day from your local machine to the FTP server. Make sure you give the right permissions to the task to enable it to run daily.
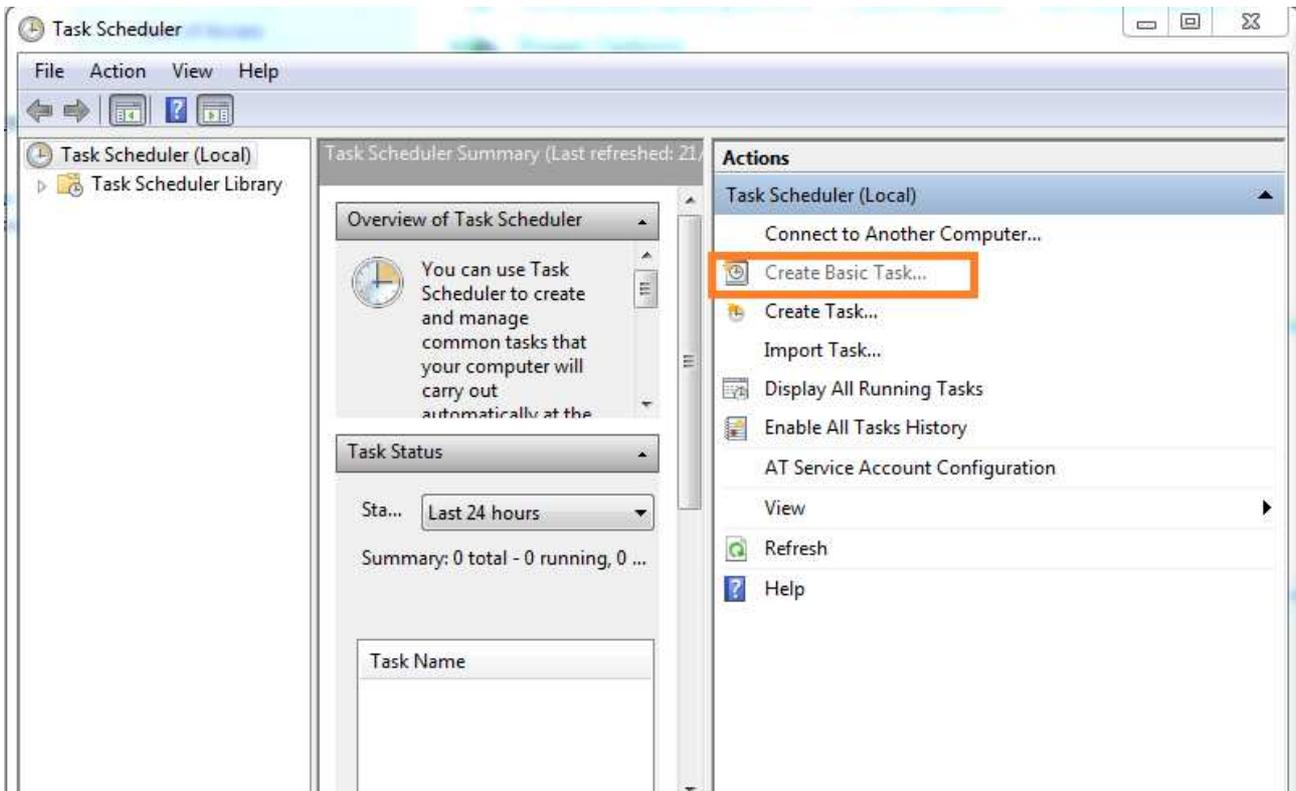
Open the Windows control panel and choose Task Scheduler to start the process.

Create Basic Task Wizard

Create a Basic Task

Create a Basic Task	Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane.
Trigger	
Action	Name: Upload Stock
Finish	Description: Upload stock file from local machine to FTP server on our web site www.mywebsite.com

< Back   Next >   Cancel

Create Basic Task Wizard

Task Trigger

Create a Basic Task	When do you want the task to start?
Trigger	⦿ Daily
Daily	○ Weekly
Action	○ Monthly
Start a Program	○ One time
Finish	○ When the computer starts
	○ When I log on
	○ When a specific event is logged

< Back   Next >   Cancel
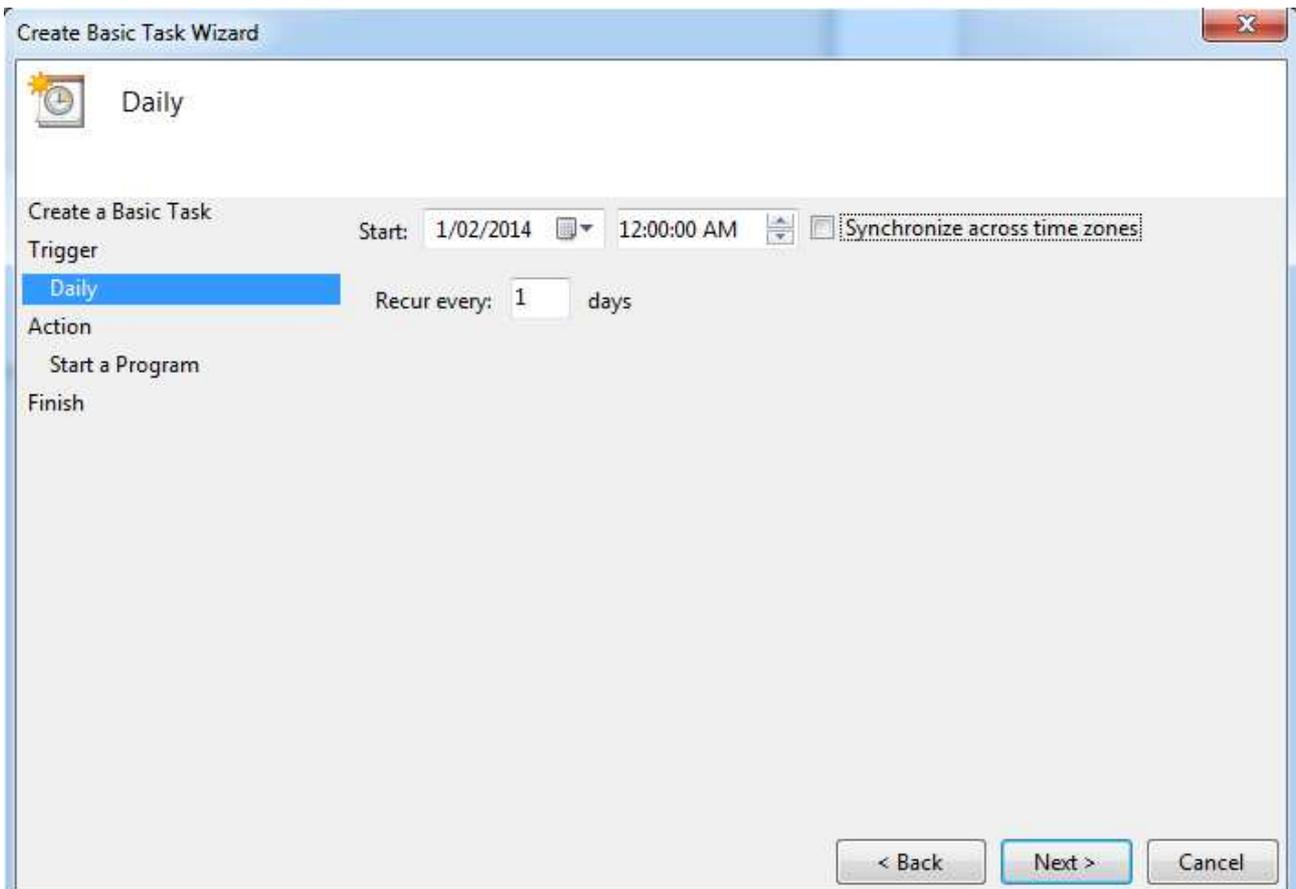
Choose the period, times and the recurring periods.