

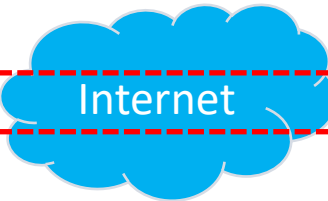


SalesAnywhere

Implementation

SalesAnywhere

What
customers
already have



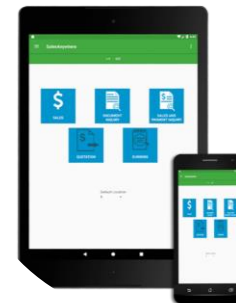
Back office

Sage 300 and
A/R, O/E Lanpaks

Just add

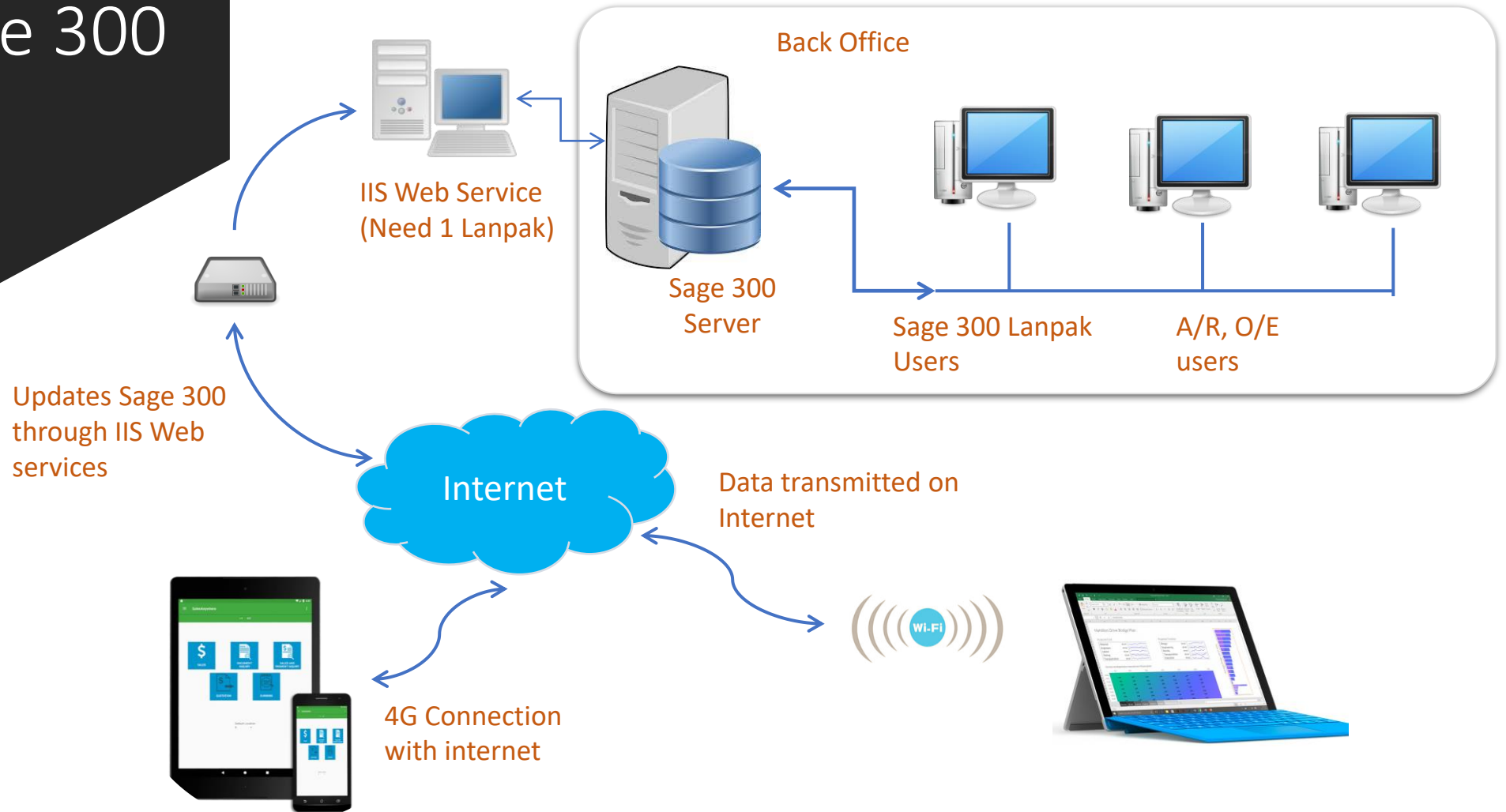


SalesAnywhere



Mobile devices

Integration with Sage 300



Requirements



Sage 300

Sage 300 2014-2019
1 Lanpak for connection



Windows Server

Windows Server 2012 or above
with IIS



Phones / tablets

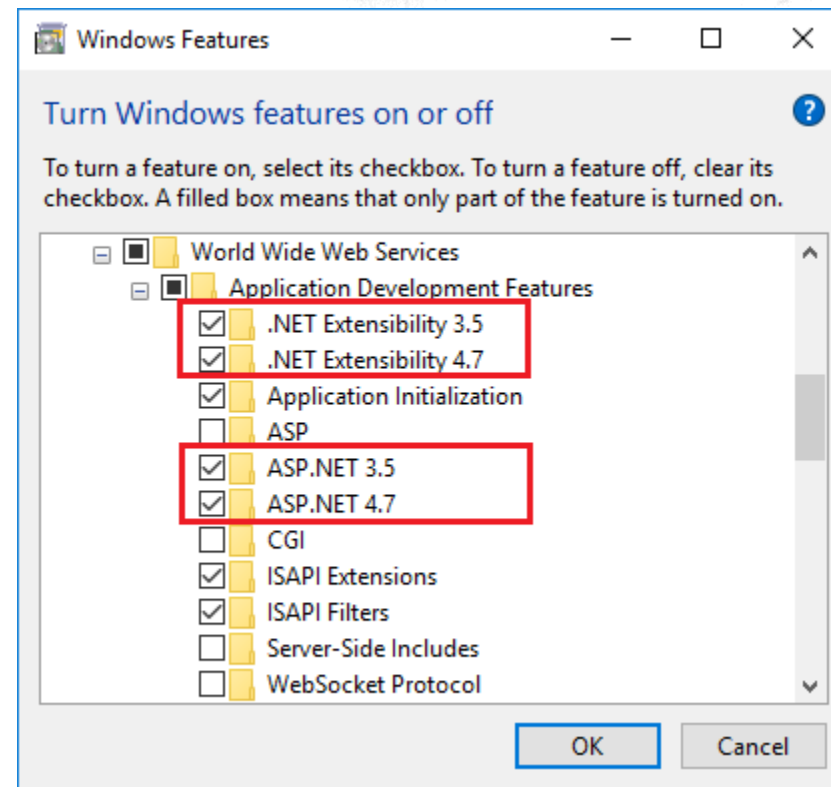
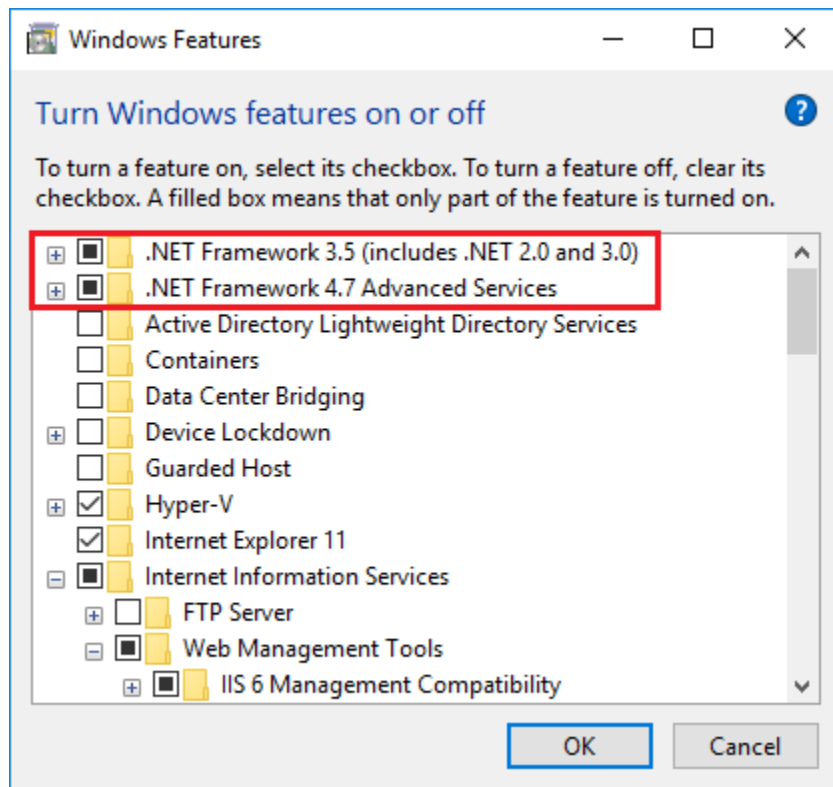
Android 5.0 or above
Bluetooth mobile printer with
72mm thermal paper (for receipt
printing)



Windows desktop version

Windows 10 Home or above
POS printer with 72mm thermal
paper (for receipt printing), with
USB connection to desktop
machine

Installation – Web Server



Installation – Web Server

Download

Download SalesAnywhere installation from autosimply.com

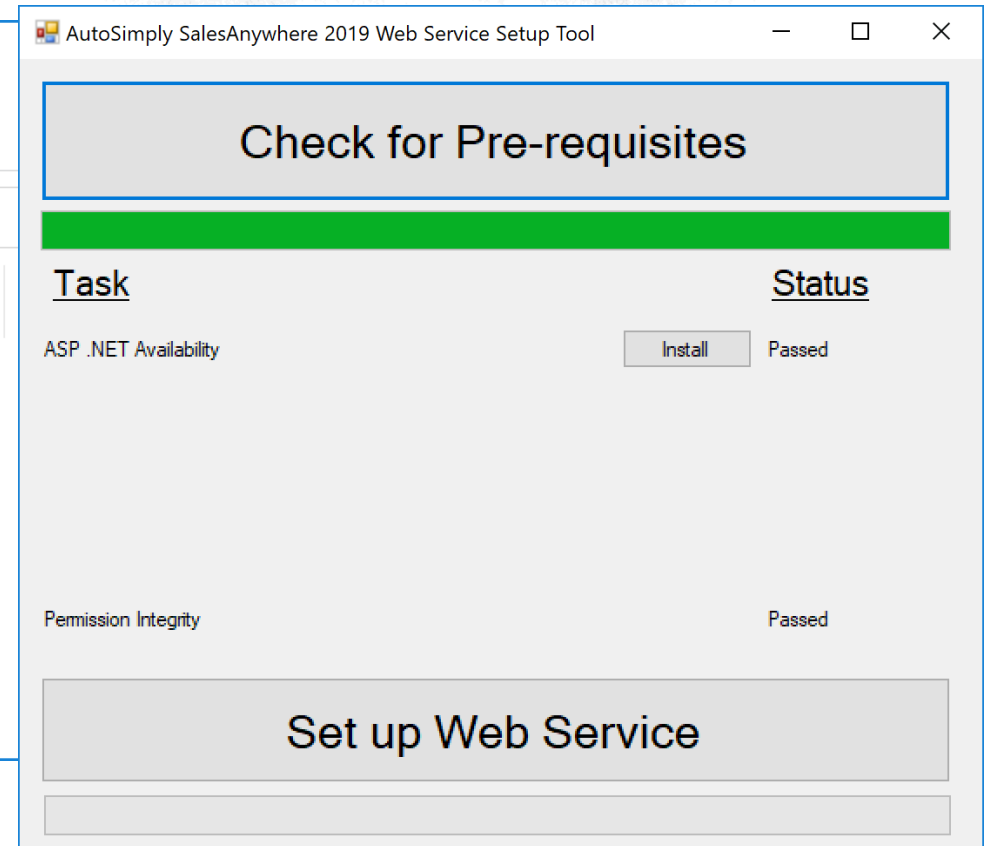
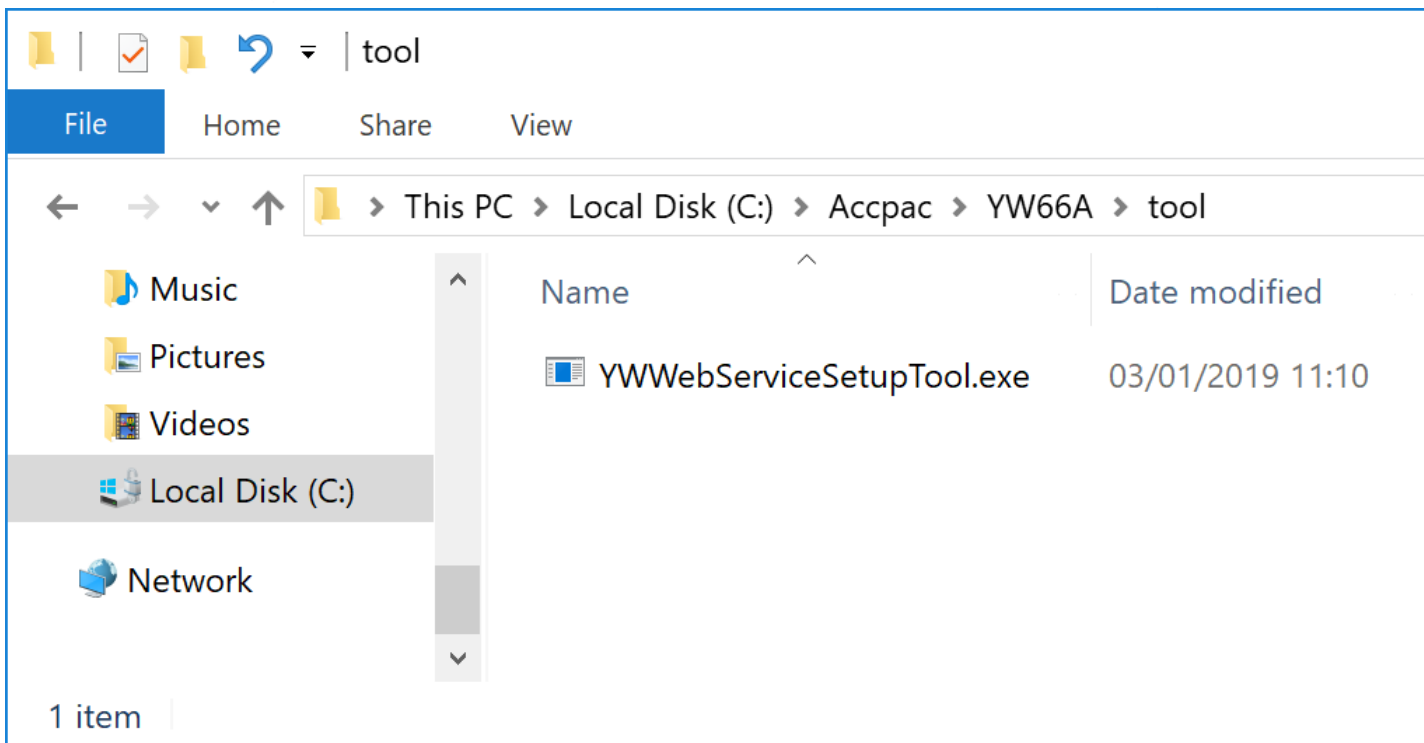
Run

Run installation

Activate

Activate SalesAnywhere on Sage 300 company

Installation – Web server



Set up in 3 simple steps

2 Set up user security

MFGLTD - User Security

File Help

User ID [i] Barcode User 1

Select to grant permission

<input checked="" type="checkbox"/> P/O Receipt	<input checked="" type="checkbox"/> I/C Internal Usage
<input checked="" type="checkbox"/> P/O Return	<input checked="" type="checkbox"/> I/C Stock Count
<input checked="" type="checkbox"/> O/E Shipment	<input checked="" type="checkbox"/> I/C Transfer
<input checked="" type="checkbox"/> O/E Return	<input checked="" type="checkbox"/> I/C Transfer Receipt
<input checked="" type="checkbox"/> M/F FG Receipt	<input checked="" type="checkbox"/> I/C Shipment

1 Set up users

MFGLTD - User Master

File Help

User ID [i] Inactive

User Name Barcode User 1

Password [] Verify []

Linked S/C User ADMIN

Save Delete Close

3 Web Service Configuration

Barcode Web Service Configuration

Web Config Location	C:\inetpub\wwwroot\WS\Web.config
SQL Database Server IP Address	localhost
Sage 300 Application Server IP Address	localhost
Database User ID	sa
Database User Password	*****
Accpac User ID	ADMIN
Accpac User Password	****

Web Service Configuration

Sage 300 - Sample Company Limited Administrator

Home

Open Company Close Company Page Setup Print Destination

File

Object Properties Desktop View Macros Miscellaneous Help

Project and Job Costing

Purchase Orders

Sales Anywhere

SDK

Visual Process Flows

A/P Transactions

A/R Transactions

R/K Reconciliation

Sales Anywhere (Registration)

Licensed to: , AutoSimply Company Limited

Dealer:

CC:

User Security

Item Groups

Web Service Configuration

Web Config Location: C:\inetpub\wwwroot\MS\User.config

Open

SQL Database Server IP Address: localhost

Sage 300 Application Server IP Address: localhost Port

Database User ID: sa

Database User Password:

Sage 300 User ID: ADMIN

Sage 300 User Password:

HTTPS Support:

Save Close

IP address or server name

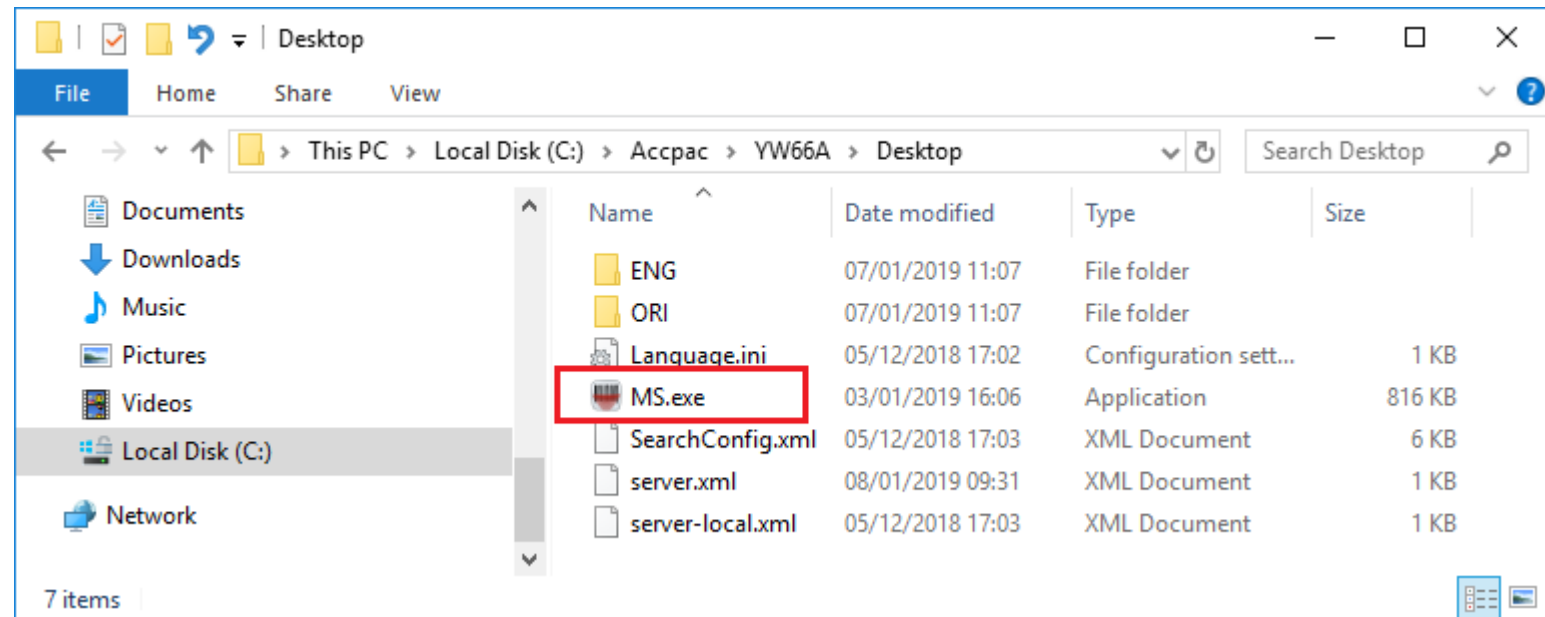
Session Date: 09/01/2019

Android phones and tablets



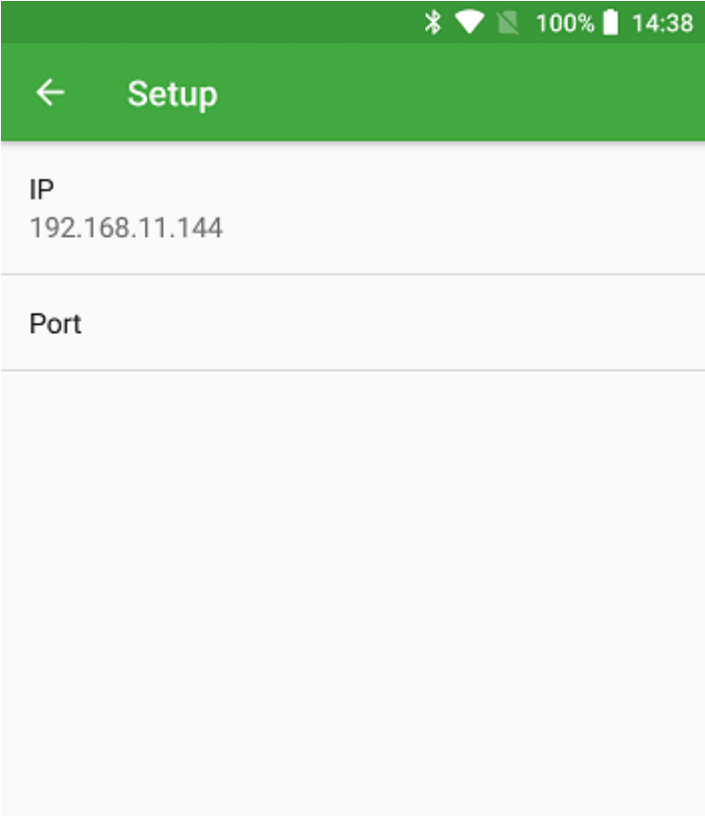
Windows desktop

1. Locate YW66A folder in Sage 300 programs folder
2. Copy the Desktop folder on machine
3. Run MS.EXE



Setting up the app

- Server IP address or name
- Port
 - Leave it empty unless
 - IIS is configured to listen on non-default port
 - Connection goes through specific port of firewall with port forwarding to web server
 - Uses default ports if left empty
 - HTTP – 80
 - HTTPS - 443



Setup

IP
192.168.11.144

Port

Optional setup

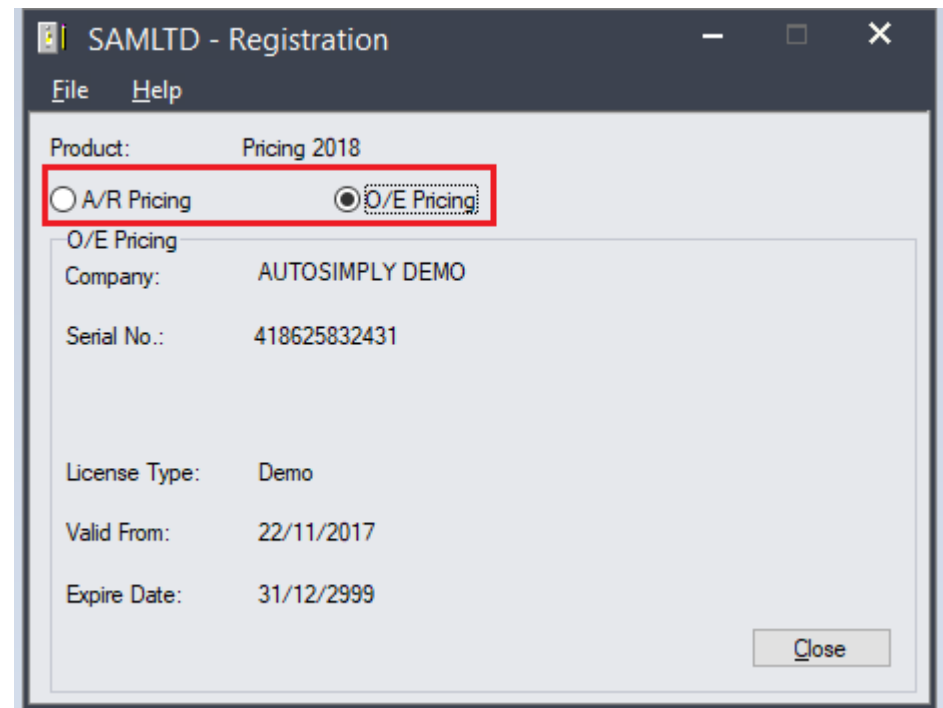
- Customer groups
 - Limit customers a user can see or create transactions
- Item groups
 - Limit items a user can see of create transactions
- Restricting locations a user can see and use
- Link user to A/R Salesperson
 - Orders created use that salesperson



Pricing

Installation

1. Installation
 - Run PX65A.EXE on Sage 300 server
2. Data Activation
 - Activate “Pricing 6.5A” on company
3. License Registration
 - Register A/R only, O/E only or both
 - If only 1 license is registered
 - The other module is disabled and removed from Sage 300 desktop



Setup O/E in 3 simple steps

2

Group customers and items for pricing purposes

Item Pricing Group: DISC Discontinued items

All items Find By: Item Number Starts with Filter: a1

Item Number	Description
A1-103/0	Fluorescent Desk Lamp
A1-105/0	13W Mini Fluorescent Bulb
A1-310/0	Halogen Desk Light
A1-320/0	50W/12V Halogen Bulb

Selected items

Item Number	Item Description
A1-103/0	Fluorescent I
A1-105/0	13W Mini Flu
A1-310/0	Halogen Des

1

Set up 1 price list for item

Item Prices

Currency Code: USD U.S. Dollars

Price List Code: USA US Price List

Item Number: A1-103/0 Fluorescent

Prices Discounts Price Check Taxes

Description: Fluorescent Desk Lamp

Price By: Quantity

Base Price Type: Base Price for Single Unit of Measure

Base Price: 79.99

3

Define volume discount levels

Discount ID: 2017VIP 2017 discounts for VIPs

Customers: Customer Group All Start Date: 26/01/2017 End Date: 03/02/2017

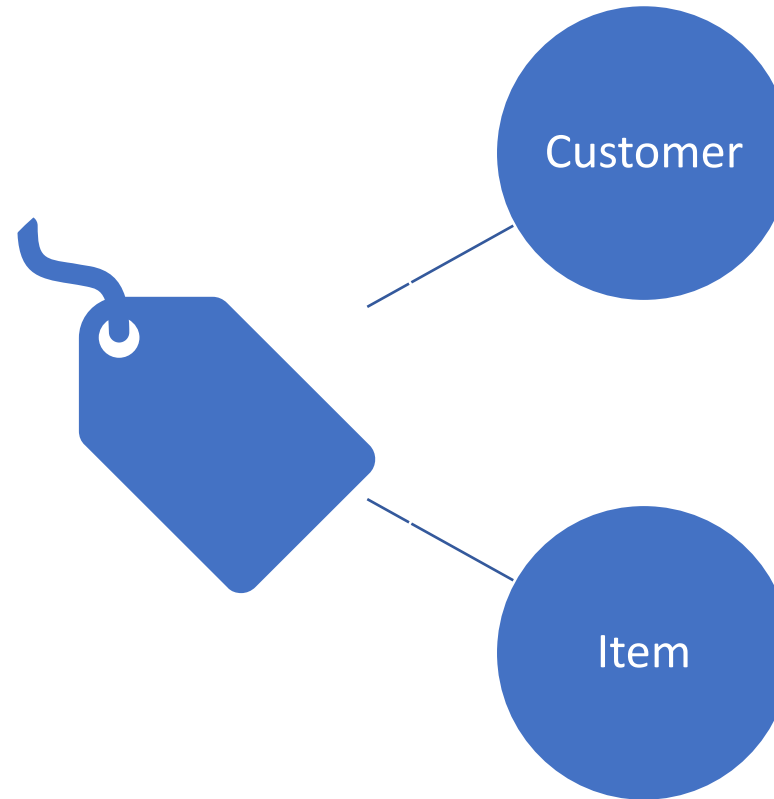
Items: Item Group All Type: Percentage CNY 2017

Currency Code: USD

Quantity	Discount Percentage
10.0000	15.00000
20.0000	25.00000
30.0000	30.00000
40.0000	35.00000
50.0000	40.00000
60.0000	42.00000
70.0000	44.00000
80.0000	46.00000
90.0000	48.00000
100.0000	50.00000

Start Date: 01/01/2017 31/12/2017
26/01/2017 03/02/2017

Volume discounts



- Specific
- Group
- Any

- Specific
- Group
- Any

Customers		
<input checked="" type="radio"/> Customer	<input type="radio"/> Group	<input type="radio"/> All
Customer		<input type="text"/>
Items		
<input checked="" type="radio"/> Item	<input type="radio"/> Group	<input type="radio"/> All
Item Number		<input type="text"/>

Volume discounts

Priority of deciding which discount to use for customer/item combination

1. Specific customer – specific item
2. Specific customer – group of items
3. Specific customer – all items
4. Group of customers – specific item
5. Group of customers – group of items
6. Group of customers – all items
7. All customers – specific item
8. All customers – group of items
9. All customers – all items

Setup A/R in 4 simple steps

1 Set up base prices for items

Item Number: BK-360 Swivel Mounting Bracket

Item Pricing | Tag Status | Statistics

Currency	Unit of Measure	Item Cost	Item Price	Alternate Tax Base
CAD	EA	75.090000	150.000000	0.000
GBP	EA	30.036000	60.000000	0.000
SGD	EA	78.800000	155.000000	0.000
USD	EA	55.500000	117.000000	0.000

2 Create pricing formulas for customer types

Price List Code: RETAIL

Currency	Percent of Base Price	Rounding Option
CAD	147.00000	Round to currency decimals
MYR	135.00000	Round to whole amount
SGD	140.00000	Round to currency decimals
USD	150.00000	Round to currency decimals

3 Group customers and items for pricing purposes

Item Pricing Group: DISC Discontinued items

Item Number	Item	Customer Pricing Group	Customer Name
BK-360	S	VIP	
CA-59	F		
		1200	Mr. Ronald Black
		1600	Dr. Dan Penn

4 Define volume discount levels

Discount ID: 2017VIP 2017 discounts for VIPs

Customers: Customer Group All

Start Date: 26/01/2017 End Date: 03/02/2017

Items: Item Group All

Type: Percentage CNY 2017

Currency Code: USD

Quantity	Discount Percentage
10.0000	15.00000
20.0000	25.00000
30.0000	30.00000
40.0000	35.00000
50.0000	40.00000
60.0000	42.00000
70.0000	44.00000
80.0000	46.00000
90.0000	48.00000
100.0000	50.00000

Start Date: 01/01/2017 End Date: 31/12/2017
 Start Date: 26/01/2017 End Date: 03/02/2017