**RedPrairie: Direct Commerce** 

## Configuring RedPrairie Purchase Order output for Emailing

## Why the need to configure?

RedPrairie's (formerly Ecometry) purchase order output for emailing, contains little formatting of it's data and no ability to add a purchase order form to the data output for emailing. With eFORMz, a RedPrairie client can now utilize the RedPrairie output to format the data, add a form, and email a pdf file to their vendors.

# Configuring eFORMz for RedPrairie's Purchase Order output

To configure RedPrairie's purchase order output for emailing using eFORMz, a RedPrairie user must be on version 8.03 or later of eFORMz. With the eFORMz installation, a sample purchase order template (*purchase\_order\_email.efz*) will be made available. Also included, is a sample purchase order template (Rich Text Format) that can be edited and refreshed to your company look and feel.

Once eFORMz has been installed, open the eFORMz Composer:

1. From your Start menu, open the eFORMz Composer by selecting *Programs* > *eFORMz* 8 > *eFORMz* Composer:



2. From the eFORMz Main Menu select *File > Open Project*.



3. Open the following purchase order template by selecting:

C:\Minisoft\eFORMz\_6\Projects\SoftwareProvider\_Templates\RedPrairie\ DirectCommerce\po\purchase\_order\_email.efz

, open		
Look <u>i</u> n:	purchaseorder	
purchase	_order_email.efz	
	-	
File <u>N</u> ame:	purchase_order_email.efz	
File <u>N</u> ame: Files of <u>T</u> ype:	purchase_order_email.efz eFORMz project files	

- A Minisoft eFORMz Composer (8.03.08), Licensed to Minisoft, eDIRECT PLUS Enabled File Project Run Host Tools Window Help o' XI d' 🛛 Viewer Project View 👻 🚭 Open Data . 💐 🔍 120 dpi 于 🕂 🛃 📕 🔒 EMCAS760\_0315\_0101.bt 🗇 1 🖨 3546.0:1194.0 Page PAGENUM = 01
   PONUM = 200000478 DATE = 03/14/12 TERMS = Net 30 DAYS SHIPVIA = PICK-UP DATEREQ1 = 03/14/12 VENDORNUM = VENDOR# MIN290W VendorAddress ShipToAddress ShipToAddress • -• Project eDIRECT PLUS ø' 🛛 T Variables Variable PONUM DATE TERMS 200000478 . VENDOR FAX NO. 03/14/12 Net 30 DAYS PICK-UP Shohomish 1024 First Street Snohomish, Washington 98290 SHIPVIA FOB ORDER DATE TERMS SHIP VIA F.O.B. DATEREQ1 03/14/12 MIN290W 03/14/12 Net 30 DAYS PICK-UP Snohomish • VENDORNUM MIN290W JOHN DOE EMAILADDRESS VendorAddress(0) **∢** ≪ ≫ ⊅ 0.0 **T** 16.67 1≣ 6.600 -. PurchaseOrder PurchaseOrder
- 4. The template will display in the eFORMz Composer.

#### eFORMz Preprocessor

In order for eFORMz to format the data, the *Replace occurrences of a string, Text file pagination* and *Text to XML Converter* preprocessors needed to be added. To view these configurations, select *Project Properties > Advanced*.

#### Replace Occurrences of a String

The *Replace occurrences of a string* preprocessor finds the form feed in the data file and replaces it with an at sign. The replacing of the form feed allows eFORMz to handle the formatting and page breaks.

Search for	¥	
eplace with	@	
	🔲 Case sen	sitive search

#### **Text File Pagination**

The *Text file pagination* preprocessor is utilized to force a line termination after every 84th column. Forcing a line termination allows the text file to "wrap" and the data to be formatted for later use in changing the file from text to XML.

Search string -		
earch column 0		
Maximu	m lines per page 0	*
Maximum	columns per line 84	*
* 0 = no	maximum	
ew page sequence	/Į	

#### Text to XML Conversion

The *Text to XML* preprocessor converts the Ecometry data output to XML. The *purchase\_order email.efz* template utilizes a specific configuration for RedPrairie purchase orders.

Printer Control Sort Notes Data Pars	sing Advanced Image	es Databases
Line Termination: 🛄 Translate CR to CR	/LF 🔲 Translate LF to CF	₽/LF
Image output type Grayscale	Image output resol	ution 96
Page Rotation* 0	* AFP and IPDS only	
Minimum page number size 0		
L oad initial page number from a file		
Initial page number file		
Update initial page number file after printi	na/output	
Preprocessors		
Replace occurences of a string	New	Move Up
Text file pagination	Edit	Move Down
Toxt to XML Converter	E GIL	
Text to XML Converter	Remove	Deactivate
Text to XML Converter	Remove	Deactivate
Text to XML Converter	Remove	Deactivate

To edit the Text to XML Converter Properties, select *Project Properties > Advanced*. Pick the *Text to XML Converter* and select the *Edit* option.

Configuration File		
Stock Configuration File	Red Prairie PO Email	-
Record Delimiter	۱n	
Character Set	ISO-8859-1	-
Show editor while in composer		
		1

#### Modifying the form template

The purchase order project file contains an RTF (Rich Text Format) template form. The template form can be edited through Microsoft Word and imported into eFORMz.

1. Open the purchase order template form from the following default directory:

 $\label{eq:c:Minisoft} $$ C:\Minisoft\eFORMs_6\Projects\SoftwareProvider_Templates\RedPrairie\DirectCommerce\po\purchaseorder.rtf$ 

2. The RTF file will display in Microsoft Word:

W	- U  =		Purchas	eOrder (Compatibilit	y Mode] - Mie	rosoft Word			
File	Home Inser	t Page Layout	References	Mailings Rev	ew View	Acrobat			
Paste 🛷 Clipboard G	Arial B Z U	* 8 * A* A * abe × x* 0 Font	*   Aa +   ⅔)  - № + <u>A</u> +  %	i = * i = * 's = * ■ ■ ■ ■ 2 * ⊡ * 2↓ Paragraph	律律 \$≣≁ ¶	aBbCcDdE A Normal 1	aBbCcDdE No Spaci Styles	AaB	Change Styles
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[	ITEM NUMBER	QUANTITY	UNIT OF MEASURE	DES	CRIPTION		DATE REQUIRED	UNIT	EXTEL

3. Make any necessary modifications.

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4. Return to the eFORMz Composer. Highlight the form from the Project Window and select the *Reload Form* icon from the toolbar.



5. The changes will be updated and shown in the Viewer.

A Minisoft eFORMz Composer (8.03.08), Licensed to N	finisoft, eDIRECT PLUS Enabled
File Project Run Host Tools Window Help	
Project 🛛 🖄	Viewer 🛛
A purchase_order_email	View 👻 🚭 Open Data
P Page1 P I PurchaseOrder	🤤 🕰 120 dpi 🕂 🕂 🛃 🚺 🙆 EMCAS760_0315_0101.td ← 1 🖨 3708.0 : 954.0
← II Variables ← II Rules ← II Document Template	IIF Page       ▲         IIIF PAGENUM = 01       ▲         IIIF PONUM = 200000478       ■         IIIF CONSTRUCTION       ●         IIIF CONSTRUCTION       ●         IIF TERMS > Net 30 DAYS       ■         IIF FORMS > Net 30 DAYS       ■         IIF CONSTRUCTION       ●         IIF CONSTRUCTION       ●         IIF VendorAddress       ●         IIF VendorAddress = JOHN DOE       ●         IIF VendorAddress = JOHN DOE       ●         IIF VendorAddress = MINUSFT       ●         IIF VendorAddress = MINUSFT       ●         IIF VendorAddress = MINUSFT       ●
Project eDIRECT PLUS	
Variables	VENDOR FAX NO. 1024 Second Street Snohomish, Washington 98290
DATE 03/14/12	ORDER DATE TERMS SHIP VIA F.O.B.
SHIPVIA PICK-UP	
DATEREQ1 03/14/12	PAYMENT TYPE
EMAILADDRESS MIN2900	
VendorAddress(0) JOHN DOE	
PurchaseOrder	PurchaseOrder

#### The Document Template

The Document Template is utilized to place the purchase order total on every dynamically created page ('POTotal'). Through the use of the Text to XML preprocessor, Ecometry's formatting of page breaks are removed to allow eFORMz to place as many detail lines as possible to one page. When the detail line count exceeds a certain number a new page will dynamically be created.

Minisoft eFORMz Composer (8.03.08), Licensed to N	finisoft, eDIRECT PLUS Enabled	
File Project Run Host Tools Window Help		
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Page1     ProcesseOrder     ProcesseOrd	🔍 🔍 120 dpi 🔢 🖶 🔢 🕒 EMCAS760_0315_0101.td (⇔ 1 🖨	5520.0 : 5652.0
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		-
Project eDIRECT PLUS		
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		10.01
PurchaseOrder	PurchaseOrder	

To edit the position of the Document Template:

1. *Right click* the *Paragraph* element and select *Edit* > *Margins*.



2. Alter the margins as needed.

General	Font	Borders	Margins	Padding	Style Id
		Automatic M	largins		
	То	p 5900.0	Bott	om 0.0	
	Le	ft 4050.0	Ri	ght 0.0	

## **EMAIL Address Lookup**

Configure a database connection to retrieve the email address corresponding to the vendor number contained within the data file. To setup or configure your database connection through eFORMz, right click the Project name and select *Properties* > *Databases*. An SQL Server database name will appear in the Database dialog box. The SQL Server database can either be configured (Edit) or a new database configuration can be created (New).

Printer Control Sort Notes Data Parsing	Advanced Images Databases	
Databases		
SQLServer*	New	
	Edit	
	Remove	
	Deactivate	
	has a second sec	
* active in Composer		
	//1 (14.14)	_

For this example, select the SQL Server database name and select Edit.

Configure database conr	nection
Database conne	ction name SQLServer
Driver class con	n.microsoft.sqlserver.jdbc.SQLServerDriver
URL etry;	;selectMethod=cursor;parametersAsUnicode=false
Properties:	Default properties
Property	Value
applicationName	
databaseName	]
bleStatementPooling	true
encrypt	true
failoverPartner	
ostNameInCertificate	
instanceName	
Load from file	Te <u>s</u> t <u>O</u> K <u>C</u> ancel
Save to file	

*NOTE*: For a list of supported databases and URL and driver classes, view Appendix B, Database URL and Driver Classes of the eFORMz Manual.

## SQL Lookup

An SQL Lookup has been configured for the 'EMAILADDRESS' variable. This lookup is designed to call the email addresses from the Ecometry database that match the vendor number contained within the data file.

1. To access the settings, *right click* the *SQL Lookup* and select *Edit*.



2. The settings will display. Edit the SQL statement, if necessary, and enter the correct table and column the email address resides in. The Parameter added below represents your database key, in this case, the vendor number is our key.

Database	SQLServer	
SQL Statemer	ıt	
Constant	ant SELECT EMAIL FROM VENDORDFROM VENDORNO = ?	
🔾 Variable		
Parameters		
VENDORNU	A	Add
		Remove
		Move up
		Move down
Additional colu	imns assigned to:	
		Add
		Remove
		Move up
		Move down

## Sort

- 1. The sort must be set so that purchase order's are grouped together and split by the purchase order number when there are multiple orders in a data file. To do this, *right click* the Project and select *Properties* > *Sort*.
- 2. Select the New option to the right of the Sort keys field.

Printer Control Sort Notes Data Parsi	ng Advanced	Images	Databases
Sort keys			V
		New	r i i i i i i i i i i i i i i i i i i i
		Edit	
		Remo	ve
		Move l	Jp
		Move Do	own
		Change (	Order
* output grouped by this key		Set Gro	up
		OK	Connal

3. Check the *By variable* option and select the variable for the purchase order number ('PONUM') from the drop down menu. Choose the *Ascending* option.

ort Key			X
O By form	) By variable		
Key for Purchase	Order PONUM		•
Ascending	Descending		
		<u>o</u> k	Cancel

4. Select the *Set Group* button. An asterisk will appear after *Ascending* to indicate it has been set.

Printer Control Sort Notes Data Parsing Adv	anced Images Databases
Sort keys	
variable PONUM;Ascending*	New
	Edit
	Remove
	Move Up
	Move Down
	Change Order
* output grouped by this key	Pocot Croup
Input is in sorted order	(Coort of oup

## Emailing an Ecometry Purchase Order with eFORMz

1. To set up the purchase order template for emailing, switch to the eDIRECT PLUS (or eDIRECT) tab and select *Add Output* > E-*Mail*.



2. *Right click* the *E-Mail* and select *Add provider > JavaMail*.



3. Enter values in the respective fields.

JavaMail				×
Envelope	SMTP Options	]		
SMTP Hos	t			
	Constant	🔾 Variab	le	
email.mini	soft.com			
From				
1 Iom	Constant	O Variah	le	
Minisoft In	c <customerserv< td=""><td>ice@minis</td><td>oft.com&gt;</td><td></td></customerserv<>	ice@minis	oft.com>	
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EMAILADD	RESS			
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Subject				
	Constant	Variab	le	
PONUM				-
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4. *Right click* the *E-Mail* and select *Add attachment*.



5. Choose *PDF* from the drop down menu and navigate to the File tab.

Format	PDF	-	Options
	Text		
	HTML		
	PDF	=	
	eFORMz Document		
	Color PCL		
	PCL		
	XML Zahro VM		

6. Select the Variable for the purchase order number.

ormat File	9		
File name			-
	O Constant	Variable	
PONUM			-
Create ur	nique file name		
Header			4
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	Constant	<ul> <li>Variable</li> </ul>	
	1	1	

7. *Right click* the content and select *Add Form(s)*.

Project	Ø	X
Sector Provide the sector of the sector	aMail ichments Content (PDF) Edit • MActive	
	Add Form(§) Add AND Condition • Remove	
I Project e	DIRECT PLUS	•

8. Select the appropriate form.

onna	
urchaseOrder	

9. From the eFORMz main menu, select *Run* > *Process w/eDIRECT PLUS (or eDIRECT)* to email the purchase orders.



### **Local Toolkit Setup**

- 1. To set up the purchase order template for automated emailing, open the Local Toolkit by navigating to the eFORMz Main Menu and selecting *Host Tools > Local Tookit*.
- 2. The Local Toolkit will display. *Right click* the configuration and select *Add Input* > *Directory*.

9			
Configure	Printers		
`onfiguratio			
	1.cfg	12 Z	Add
- Bullbackensonda	Add Input	Directory	<u></u>
	New Configuration Open Configuration	Remote directory MQ message queue	Remove
	Save Configuration Save Configuration As		Change
	Logging		Enable
			Disable
•			
		Start Queue Monitor(s)	Stop Queue Monitor

3. Select the browse button (...) for the *Input Directory* and locate the input directory. This is where the source print file will reside and then be pulled to be merged with the eFORMz Project. For Ecometry users this is likely the SPOOLOUT directory, though eFORMz is capabale of monitoring multiple directories.

Name			
Input Director	C:\Minisoft\eFORMz_6\Inj	put	
heck Interval (in seconds	60		1
Priorit	Default 👻		

4. *Right click* the *Input Directory* and choose the *Add File Selector* option.

1	12N	
onfigure	Printers	
onfiguratio	n	
	.cfg	Add
		Remove
	Remove	<u>C</u> hange
	Change	Enable
		Disable
([	Start Queue Monitor(s	Stop Queue Monitor

5. Enter the print file that has been selected to merge with the eFORMz Project. In the SPOOLOUT directory, there will be several purchase order data files. In order for eFORMz to pick up and process them all, they can be wildcarded by using an asterisk. Also, be sure to check the *Append ".hld" to the selected file* option. This retains the extension of the print file, which with Ecometry, refers to the job number that produced the output.

File Selection	×			
File Selection EM*	*			
Disposition: 🔾 🤇	○ Change extension of selected file to ".hld"			
•	Append ".hld" to the selected file			
0	Delete selected file			
Additional File	e Selector (none)			
	File Selector Properties			
	Sort by:   File name  Date/time last modified			
	Ascending O Descending			
	<u>O</u> K <u>C</u> ancel			

6. *Right click* the *File Selector*, highlight the *Add Processor* and pick the *eFORMz* option.

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7. Choose the *purchase order email.efz* project template.



8. *Right click* the *eFORMz Project*, highlight *Add Output Process* and select *Process w/ eDIRECT PLUS*.

4	Local Toolkit: Queue N	Ionitors not Running, Licer	nsed to Minisoft, eDIRECT PLUS Enab	led		
F	File					
1	Configure Printers					
	Configuration					
	LocalPM.cfg					
		C:\Minisoft\eFORMz_6\Inp	ut			
- File Selection: PURCH*.J*						
	Gereichter Commentation - Commentatio- Commentation - Commentation - Commentatio-					
		☑ Active				
		Add Output Process 🕨	Print			
		Remove	File Output			
		Change	Process w/eDIRECT PLUS			
			1			

9. Enter the directory that will store the email records. Select Disable standard subdirectories to disable the creation and indexing of new subdirectories for each batch of emails.

Base Directory plates\RedPrairie\DirectCommo	erce\po\purchase_orde	er_email.efz

10. The Local Toolkit has been configured to email RedPrairie Direct Commerce purchase orders.

e							
Configure	Printers	]					
Configuratio	on 🔹						
LocalPM.cfg  Cillingut directory: C:\Minisoft\eFORMz_6\Input  File Selection: PURCH*.J*  File Selection: PURCH*.J*  Cillingut directory: C:\Minisoft\eFORMz_6\Projects\SoftwareProvider_Temp					-	<u>A</u> dd	
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