

# INTEGRATING EDI INTO SAGE ERP X3 USING



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# Introduction

At SWK Technologies our roots date back to 1987 as one of the first companies to offer EDI integration with Sage accounting and ERP software. We are a Sage Software reseller, Sage Top Performer and Sage President's Circle member for successive years. Also, as a Sage Gold Development Partner we have successfully integrated EDI with Sage 100 ERP, Sage 500 ERP and Sage ERP X3 for hundreds of companies through our MAPADOC product. SWK has gained thorough knowledge of the Sage product line and we know what it takes to integrate EDI.

SWK goes to great lengths to examine the business needs of our clients before recommending a solution. We understand how Sage ERP products work and understand what it takes technically to integrate EDI. Being a Sage reseller and offering EDI integration software and services provides a unique combination that customers appreciate.

## Quick Facts

**Year founded:** 1987

**Number of employees:** 70

**Management Team:**

Jeff Roth, CEO

Gary Berman, EVP

Hellene Thurston, Channel Sales

**Target markets:** Distribution  
Manufacturing  
Wholesale

**Distribution method:** Value Added Resellers

**Number of customers:** 350 Active

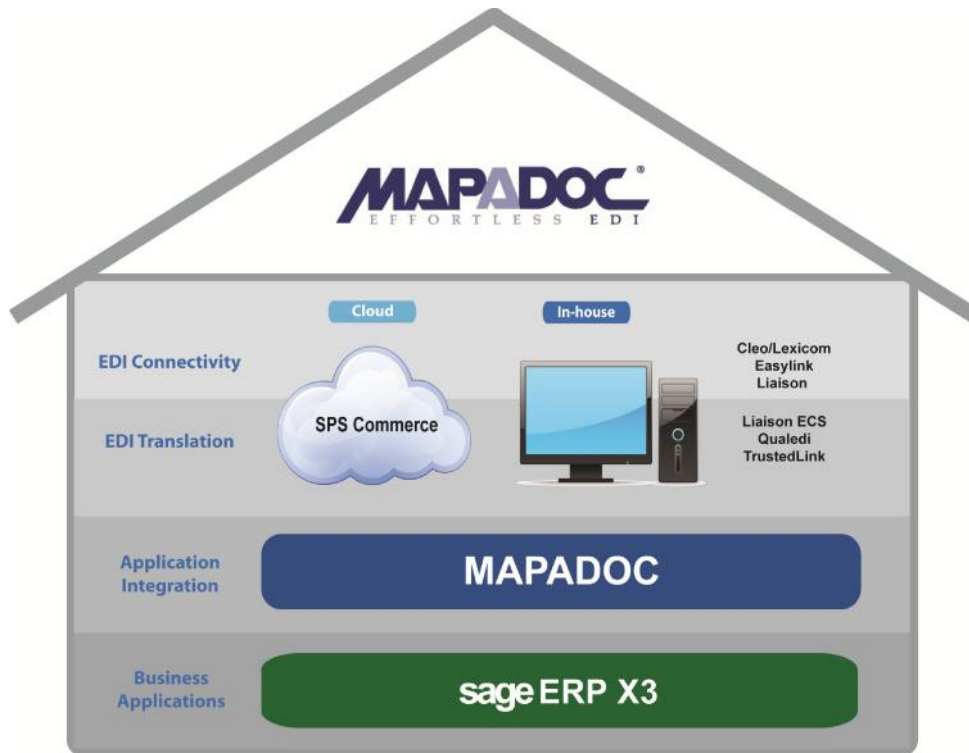
## Sales Contact



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# Product Information

## EDI Components



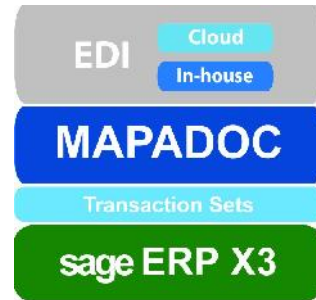
SWK offers a 'one stop shop' for companies looking for one or more EDI components. We are experts in EDI integration and work closely with many third party EDI products and services. SWK has partnered with the SPS Commerce to offer an end-to-end cloud EDI service integrated with Sage ERP X3. Likewise, we work with many of the popular in-house PC based EDI products.

Customers do not have to depend on a programmer to use MAPADOC. Customers can be self-sufficient and do the mapping or enlist the services of SWK. When customers need help, they call upon SWK as the first line of support for all EDI components, not just MAPADOC.

# Product Information

## MAPADOC Sage ERP X3 Edition

MAPADOC is built for integration with Sage ERP X3. MAPADOC is written in 4GL and Java via the Sage ERP X3 development tools. By following Sage Software's architecture, MAPADOC is technically interwoven and has the same look and feel of other functions in the Sage ERP X3 menu structure.



## Cloud EDI

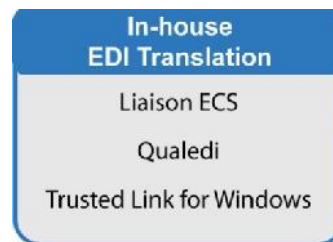
SWK has partnered with SPS Commerce to form an end-to-end EDI solution that combines the SPS Commerce cloud EDI service with SWK's MAPADOC integration software and services. SPS Commerce handles all the EDI requirements for the customer, and SWK integrates the documents into the customer's Sage ERP X3 system. Together, we work closely to ensure the solution is installed and fully tested to the customer's satisfaction.



## In-House EDI

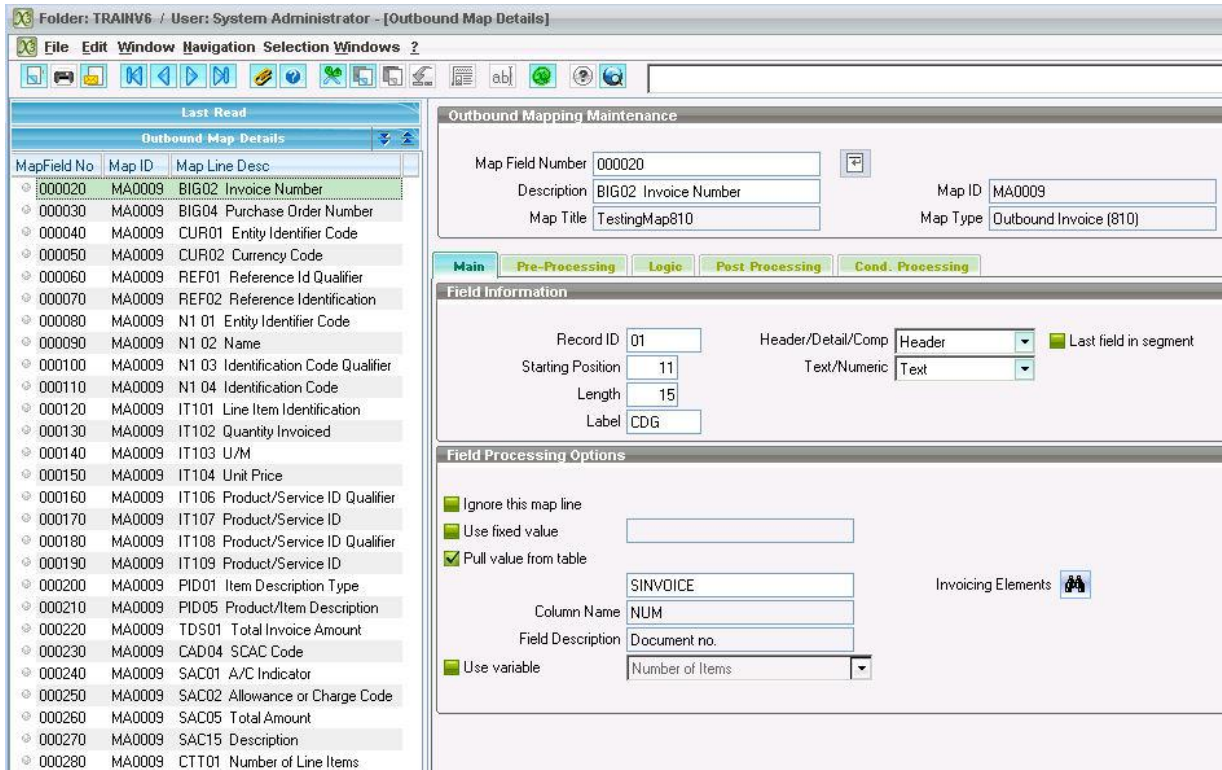
Alternatively, SWK is a reseller of many popular third party EDI products that specialize in in-house EDI connectivity and translation. If a customer has already purchased a different EDI product, SWK will work with that product to leverage the customer's investment and ensure the integration with Sage ERP X3 runs smoothly.

These are the third party EDI connectivity and translation products available from SWK:



# Product Information

## MAPADOC Features

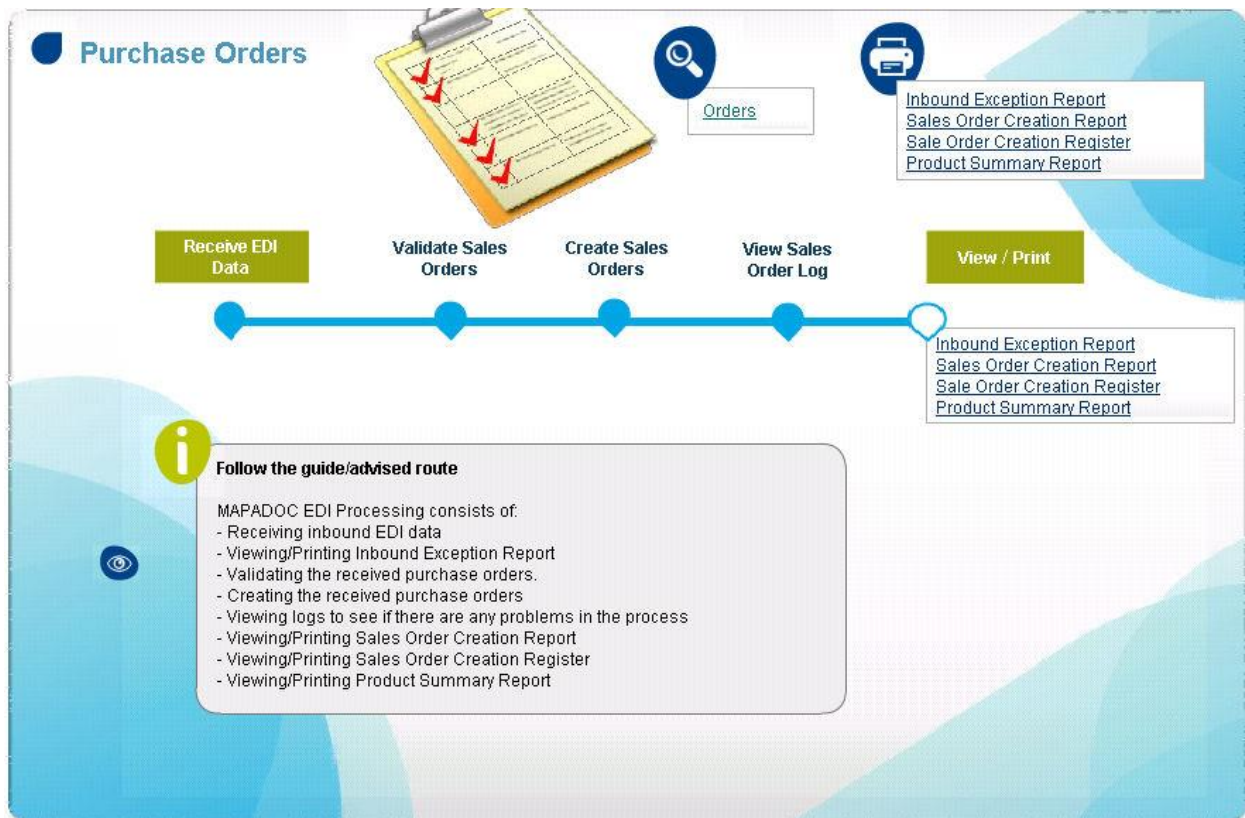


MAPADOC is user-friendly software that reduces data entry time and costs by eliminating the need to re-key data into Sage ERP X3. This improves communications with customers and vendors by automating routine tasks quickly and efficiently.

By using MAPADOC, customers gain the ability to maintain trading partner maps without the need for a programmer. MAPADOC provides easy to use mapping tools that reduce mapping time considerably. These features improve the flow of EDI data from trading partners and the integration with Sage ERP X3.

# Product Information

**Sales Order Creation.** MAPADOC turns EDI 850 purchase orders received from customers into sales orders in Sage ERP X3. Each trading partner produces an EDI purchase order that looks different and MAPADOC maps it correctly into Sage ERP X3. Customers have the flexibility through MAPADOC to apply business rules when creating the sales orders. For example, one EDI 850 purchase order can produce multiple sales orders and when applicable; different customer numbers can be assigned based on ship to locations. Incoming data is validated and exceptions to the business rules are reported.



# Product Information

**Invoice Creation.** MAPADOC creates EDI 810 invoices based on posted invoices in Sage ERP X3. MAPADOC reformats the invoice to correctly match the EDI invoice requirements of each trading partner. Customers have the flexibility through MAPADOC to apply business rules when creating the invoices. For example, multiple lines of the same item can be consolidated when the invoice is created and when applicable; MAPADOC can send EDI credit and debit memos. Outgoing data is validated and any exceptions to the business rules are reported.



# Product Information

**Generate ASNs.** An Advanced Ship Notice is a very complicated EDI document. MAPADOC automates the creation of ASN packaging data and includes many options to make the ASN and label printing process flexible to your shipping needs.



**Turnaround data.** Sage ERP X3 does not always have a home in its database for all fields that arrive on an inbound EDI document. The trading partner expects the data in those fields to be sent back in other EDI documents later. MAPADOC gives the user the option to store this data in MAPADOC Custom Fields so the data can be retrieved and sent later in outbound documents.

**Cross-reference tables.** Often one trading partner will transmit data such as a shipping code and expect their trading partner to know the description for that code. MAPADOC includes a variety of cross-reference tables where it will look-up one value such as a shipping code, and return another value prior to integrating the transaction with Sage ERP X3.



# Product Information

**Ship To Cross Reference**

List Num	<input type="text" value="STC001"/>		
List Name	<input type="text" value="WalmartShipTo"/>	Description	<input type="text" value="Walmar Ship To Xref"/>
Customer Trading Partner	<input type="text" value="CT000001"/>	Name	<input type="text" value="Walmart"/>

**Ship To CR Details**

**Ship To Cross Reference Detail**

	Customer	Ship To Address	Cross Reference Code
1	C9101	CRP1	10025648985115
2	C9101	ST001	10025648985116
3	C9101	ST002	10025648985118
4	<input type="text"/>		

**Data Validation.** MAPADOC provides data validation during both inbound and outbound document integration to ensure that the data flowing in and out of the system is accurate. Users have the ability to validate transactions before they are processed so that any incorrect data or missing cross references can be corrected and/or setup before transactions are processed.

	10/29/13 09:04:01 [ADMIN] Mapadoc Sales Order Validation
1	Mapadoc Sales Order Validation October 29,2013 09:04:01
2	-----
3	Trading Partner: Walmart
4	Processing PO #: 0044-2404290
5	Processing PO #: 0044-2404291
6	Processing PO #: 0044-2404292
7	Cross Reference value: 1223654854544 not found in WalmartShipTo Ship To Cross Reference.
8	Processing PO #: 0044-2404293
9	Processing PO #: 0044-2404294
10	-----
11	Completed Sales Order Validation October 29,2013 09:04:01
12	

**Label Printing.** MAPADOC prints UCC-128 labels according to each trading partner's specifications by passing the data to third party label printing software.

**Unattended Processing.** Many functions in MAPADOC will operate in unattended mode. This means repetitive tasks or events can be scheduled to run without user intervention. For example, the EDI invoice creation process can be setup to run unattended so that after invoices are posted, MAPADOC can automatically create an EDI invoice to be sent to the customer.

# Product Information

## Transaction Sets & Maps

### Transaction Sets

MAPADOC is built around maps for EDI transaction sets such as an 850 and 810. A map is a trading partner's adaptation of an EDI transaction set. SWK has the most integrated EDI documents available in the marketplace for Sage ERP X3. SWK maintains a library of maps that are available to customers at no extra cost. New maps are frequently added to the library to meet the expanding business needs of customers. Some tweaking and customization of maps may be necessary for an additional cost depending on a customer's Sage ERP X3 installation.

These EDI transactions sets have been integrated into MAPADOC for Sage ERP X3:

Inbound	Outbound
(850) - Purchase Order	(810) - Invoice
(810) - Invoice	(850) - Purchase Order
(852) - Product Activity Data - for report	(856) - Advance Ship Notice
(945) - Warehouse Shipping Advice	(855) - Purchase Order Acknowledgement
	(940) - Warehouse Ship Order

# Product Information

## Sage Software Authorized Training Center

SWK operates a Sage Software Authorized Training Center (ATC), which is the only center that covers the New York Metropolitan area and New England states. SWK offers training in most modules and related business tools for Sage 100 ERP, Sage 500 ERP and Sage ERP X3 as well as different levels of training for MAPADOC.

### MAPADOC

This two-day MAPADOC class will provide you with hands on training to set up new maps, add new trading partners and perform the day-to-day operations. Attendees will attain ownership of your EDI solution and become autonomous having mastered the operations of MAPADOC. You will gain an understanding of your customers' EDI requirements and maximize the options available in MAPADOC.

In summary, by attending this class you will:

- Learn the steps for setting up an EDI trading partner
- Create maps and implement EDI documents
- Increase your overall knowledge of EDI
- Understand how other trading partners handle EDI transactions
- Learn to interpret your customers' EDI requirements and apply them to MAPADOC
- Review in-house EDI translators and how they apply to your MAPADOC solution

### MAPADOC ASN

This optional one-day extension to the MAPADOC class will teach you the fundamentals of the Advanced Ship Notice (ASN) and how it fits into your EDI process. You will learn to maximize your MAPADOC installation to effectively use ASNs and manage the requirements of your customers:

In summary, by attending this class you will:

- Learn how to use ASNs and UCC128 labels
- Setup and process ASNs
- Print UCC128 labels
- Create ASN maps

# Product Information

## Certifications and Designations

SWK is a Sage Gold Development Partner. This is a select tier for established companies who have a close working relationship with Sage. As a result, MAPADOC has gained visibility and credibility within Sage, among Sage customers and among our peers.



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