OnSite
SAGE Integration

SAGE Product Search

SAGE Product Search allows you to quickly retrieve product details from the SAGE Online catalog by entering the SAGE ID or Product ID for a specific product and provides tools for adding the returned product and its setup charges as line items on quotes or orders.

There are a few steps you need to perform to setup the SAGE integration. There are also a few prerequisites before the integration will be active.

Due to SAGE requirement changes, the OnSite integration with SAGE will only work properly for versions of ShopWorks OnSite starting at 7.600 and greater.

Prerequisites

1. **SAGE membership**

   http://www.sageworld.com/

2. **SAGE App Connector License Subscription**

   In addition to the SAGE membership you must have a subscription to their App Connector License which allows access to their online catalog. If you already have a subscription for an online store or other application, you do not need multiple subscriptions.

   Contact SAGE for pricing and to enable your licenses.

Overview

There are four processes that need to be completed to enable SAGE integration into OnSite.

1. Setup SAGE XMLDataStream user and privileges.

2. Create an ODBC Data Source on your server or host computer.

3. Setup the PHP Plugin at each OnSite Workstation.

4. Enable SAGE in OnSite

Step 1: SAGE XML DataStream User

NOTE: Before beginning this step contact SAGE to setup your XML DataStream.

After you have set up your subscription for the SAGE App Connector License you must assign access to a user in the SAGE Account Manager. It is recommended that you create a new user, but you can work with an existing user account if desired, **though is not advisable to use your administrator account to access the XML DataStream.**

If you are already using the XML DataStream for an online store or other application, you can use the account you already have set up.

Use the following procedure to create a new user with access to the XML DataStream:

1. Log in to your SAGE account using your administrator user name and password.

    https://www.sagemember.com/

2. Select the "Users" tab.

3. Add a new user called "XML DataStream User" and assign a Login ID and Password for the user account. Make note of the Login ID and Password as these will be used later in this document.

4. Near the bottom of the page, select the checkbox for "XML DataStream (API Access)" to enable XML access for this user.

5. Save the profile.

Step 2: Setup ODBC Data Source On Your Server

You must create an ODBC Data Source on your server. This does NOT need to be done for every workstation.

Part 1: Download and install the MySQL ODBC Connector

1. Download the MySQL ODBC Connector installer from the location below:

    Windows Download

    http://www.shopworkscentral.com/medias/4f69vgsi1n

    mysql-connector-odbc-5.1.8-win32.msi

    This is the 32-bit installer for Windows. Even if your operating system is 64-bit, you need the 32-bit installer.

    Mac Download

    For MacOS there is no installer file. You must download the files from the MySQL link below and then review their help files for instructions on manually creating the ODBC driver.

    http://dev.mysql.com/downloads/connector/odbc/#downloads

2. Install the ODBC Connector from the downloaded file in the above step.

Part 2: Create an ODBC Data Source Name

1. Open: Start Menu – Control Panel – Administrative Tools – Data Sources (ODBC)

   For 64-bit Windows operating systems, you cannot open the standard ODBC administrator. You must navigate to and open the following file to access the 32-bit ODBC drivers:

   > C:\Windows\SysWOW64\odbcad32.exe

   For MacOS, locate and use the standard ODBC Administrator.

2. Switch from the default "User" tab to the **"System DSN"** tab and select "Add", then choose the "MySQL ODBC 5.1 Driver" from the list and "Finish"

3. Fill out the following fields for the Data Source

   - Data Source Name: **SW**
   - TCP/IP Server: **proofstuff.com**
   - Port: **3306**

4. Select OK

Step 3: PHP Plugin – Each Workstation

> **NOTE**: Skip this step if you are currently using OnSite 8 or higher. The plugin is automatically installed.

> **NOTE**: Skip this step if your initial installation was with OnSite 7.3 or higher. The installation included the plugin.

For each workstation that will be using the SAGE Product Search you must install the PHP Plugin for FileMaker Pro.

1. Download the PHP Plugin installer.

    For Windows download *OnSite 7 PHP Setup.msi*

    http://www.shopworkscentral.com/medias/envlfc0r1i

    For MacOS download *PHPForMac.zip*

    http://www.shopworkscentral.com/medias/toa1s2beu9

2. Install the PHP Plugin from the downloaded file.

    For Windows run the .msi installer file.

    For MacOS there is no installer file.

    - Unzip PHPForMac.zip file downloaded in the previous step.
    - Place the unzipped files into: Applications - FileMaker Pro XXX - Extensions

    PHP Support (folder)
    PHP_Intel.plugin (file)

    Note: "XXX" above represents the version of Filemaker you are currently using.

Step 4: Certificate File Installation – Each Workstation

For each workstation that will be using the SAGE Product Search you must install the "ca-bundle.crt" certificate file.

1. Download the "ca-bundle.zip" file from

   http://www.shopworkscentral.com/medias/30hh3amdj8

   Unzip/Extract the contents of this file.

2. Navigate to: "C:\Program Files\FileMaker\FileMaker Pro XXX\Extensions\PHP Support" and place the "ca-bundle.crt" file inside this "PHP Support" folder.
   Note: If you installed FileMaker Pro in a non-default location, then navigate to that location.

   Note: This folder will be available if the PHP plugin in step 3 has been installed.

   Note: "XXX" above represents the version of Filemaker you are currently using.

Step 5: Enable SAGE in OnSite – From ANY Workstation

After the preceding three steps you are now ready to enable and test the SAGE Integration.

1. Log in to OnSite on any workstation

2. Go to Utilities – Company Setup – Sales & Marketing – Other – SAGE Integration

3. Select the "Allow SAGE Product Search" option to turn on the integration.

4. Also verify that the "Enabled" option is selected. If it is not enabled it means either…

   - There is an error with the ODBC Data Source (step 2 above).
   - You do not have an active subscription with ShopWorks.

5. Enter your SAGE user account information (from step 1 of this document).

   - Setup and Training videos for SAGE can be found at
     http://www.shopworkscentral.com/p/p6Pp

6. You must now exit OnSite, then re-open to begin using the SAGE Product Search.