

Sage 50 EDI User Guide

Last Modified: April, 2024
Revision Number: 17

Table of Contents

Sage50 EDI.....	3
Address Transfer	4
EDI Transfer	7
1 - Select the batch to transfer.....	7
2 - Check the Details tab	7
3 - Transfer Preview Tab.....	8
4 - Sending a batch.....	8
Transmit Log.....	9
Additional Help	9

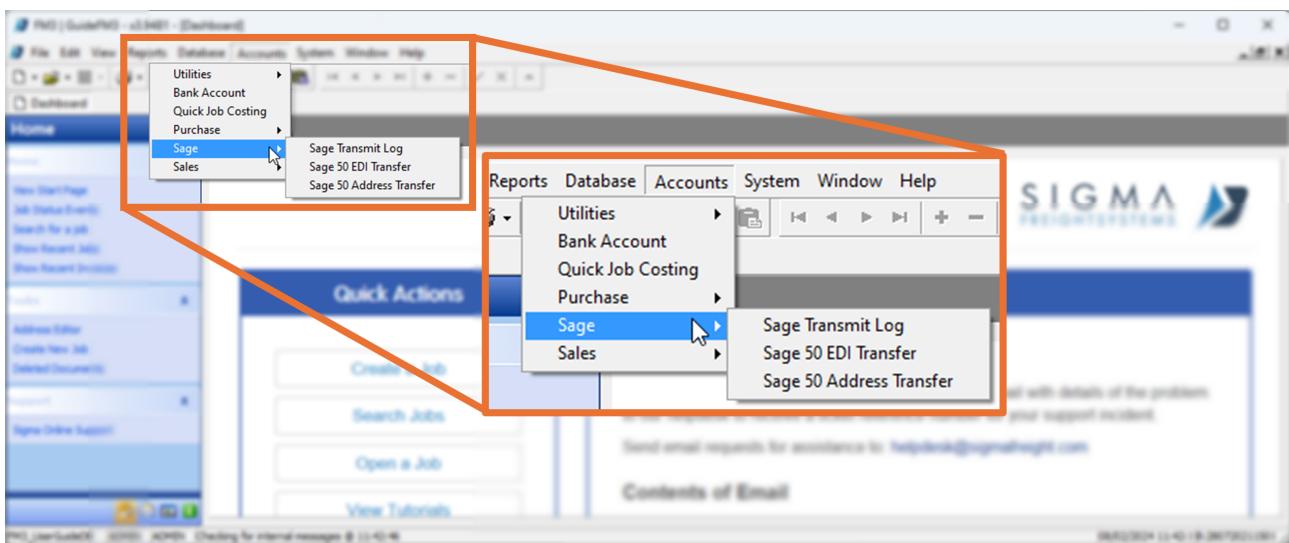
SAGE50 EDI

The Sage50 EDI service allows FM3 and Sage 50 to automatically send data to one another.

Depending on your company processes for on-boarding new customers and suppliers the interface allows you to send newly created addresses directly into Sage so the information is only entered once. If your process is to enter the address directly into Sage then the interface will synchronise the addresses capturing any edits and updating the address in the opposite database.

The service also allows the transfer of sales and purchase invoice batches directly into Sage. As part of the synchronisation process a balance and credit limit is posted back into FM3 against the customer address. This gives operational staff a working value when creating new jobs.

Once set up, there will be a 'Sage' section within the 'Accounts' tab/menu in the main toolbar.



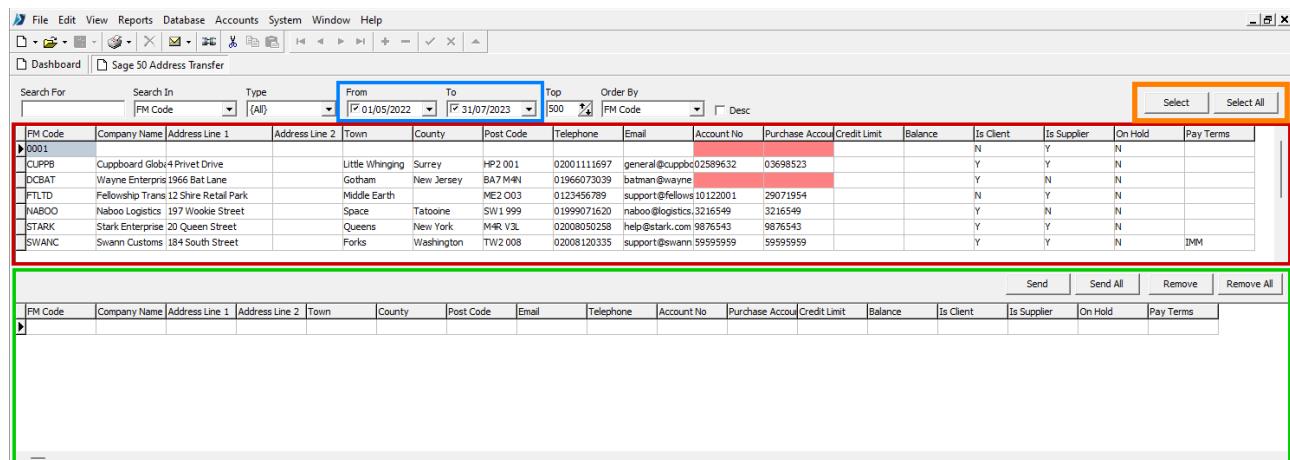
ADDRESS TRANSFER

Within FM3, addresses can be synchronised with Sage50, this will be done from the 'Sage50 Address Transfer' page.

There are two grids in use during the address transfer process, the **top (Address Search) grid** which shows the addresses that meet the search criteria, and the **bottom (Queue) grid** displaying addresses selected to be sent to Sage50.

By default, the **upper grid** will only display Supplier or Client addresses - as these are the only types Sage accepts - but these filters can be altered to show specific addresses.

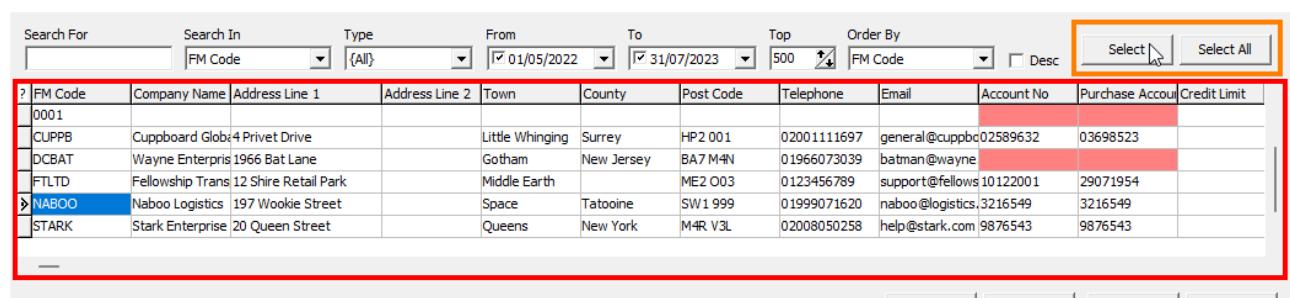
One filter which could come in handy is the **'Date' filter** using the created date. With this, weekly updates could be sent over to Sage50 by simply changing the dates.



The screenshot shows the Sage 50 Address Transfer interface. At the top, there is a toolbar with various icons. Below the toolbar, the title bar reads "Sage 50 Address Transfer". The main area contains two grids. The top grid is a table with columns: FM Code, Company Name, Address Line 1, Address Line 2, Town, County, Post Code, Telephone, Email, Account No, Purchase Accou, Credit Limit, Balance, Is Client, Is Supplier, On Hold, and Pay Terms. It has a search bar at the top with "From" set to "01/05/2022" and "To" set to "31/07/2023". The bottom grid is a similar table with the same columns, but only the first row is visible. At the bottom of the interface, there are buttons for "Send", "Send All", "Remove", and "Remove All".

Sage 50 Transfer Page

To move addresses from the top to the bottom grid click the **'Select'** button after choosing individual addresses to move (as below) or the **'Select All'** button if all addresses shown need to be transferred.



The screenshot shows the Sage 50 Address Transfer interface with a red border highlighting the row for "NABOO Naboo Logistics 197 Wookie Street". The top grid has columns: FM Code, Company Name, Address Line 1, Address Line 2, Town, County, Post Code, Telephone, Email, Account No, Purchase Accou, Credit Limit, Balance, Is Client, Is Supplier, On Hold, and Pay Terms. The "Select" button is highlighted with a red border. The bottom grid is empty.

Before Any Addresses Are Selected To Transfer

Search For		Search In		Type	From	To	Top	Order By			
		FM Code	{All}		01/05/2022	31/07/2023	500	FM Code	<input type="checkbox"/> Desc	<input type="button" value="Select"/>	<input type="button" value="Select All"/>
►	0001	CUPPB	Cupboard Glob	4 Privet Drive	Little Whinging	Surrey	HP2 001	02001111697	general@cuppb.co	02589632	03698523
►	DCBAT	Wayne Enterpris	1966 Bat Lane		Gotham	New Jersey	BA7 M4N	01966073039	batman@wayne		
►	FTLTD	Fellowship Trans	12 Shire Retail Park		Middle Earth		ME2 O03	0123456789	support@fellows	10122001	29071954
►	STARK	Stark Enterprise	20 Queen Street		Queens	New York	M4R V3L	02008050258	help@stark.com	9876543	9876543
►	SWANC	Swann Customs	184 South Street		Forks	Washington	TW2 008	02008120335	support@swann	59595959	59595959
—											
<input type="button" value="Send"/> <input type="button" value="Send All"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/>											
FM Code	Company Name	Address Line 1	Address Line 2	Town	County	Post Code	Telephone	Email	Account No	Purchase Accou	Credit Limit
► NABOO	Naboo Logistics	197 Wookie Stre		Space	Tatooine	SW1 999	naboo@logistics.01999071620	3216549	3216549		

One Address Selected To Transfer

Search For		Search In		Type	From	To	Top	Order By			
		FM Code	{All}		01/05/2022	31/07/2023	500	FM Code	<input type="checkbox"/> Desc	<input type="button" value="Select"/>	<input type="button" value="Select All"/>
►	0001	CUPPB	Cupboard Glob	4 Privet Drive	Little Whinging	Surrey	HP2 001	02001111697	general@cuppb.co	02589632	03698523
►	DCBAT	Wayne Enterpris	1966 Bat Lane		Gotham	New Jersey	BA7 M4N	01966073039	batman@wayne		
►	FTLTD	Fellowship Trans	12 Shire Retail Park		Middle Earth		ME2 O03	0123456789	support@fellows	10122001	29071954
►	SWANC	Swann Customs	184 South Street		Forks	Washington	TW2 008	02008120335	support@swann	59595959	59595959
—											
<input type="button" value="Send"/> <input type="button" value="Send All"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/>											
FM Code	Company Name	Address Line 1	Address Line 2	Town	County	Post Code	Telephone	Email	Account No	Purchase Accou	Credit Limit
► NABOO	Naboo Logistics	197 Wookie Stre		Space	Tatooine	SW1 999	naboo@logistics.01999071620	3216549	3216549		
►	STARK	Stark Enterprise	20 Queen Street		Queens	New York	M4R V3L	02008050258	9876543	9876543	

Two Addresses Selected To Transfer

Once all addresses (that you wish to send) have been selected and are shown in the **Queue grid**, there are two options - **Send** and **Remove**. These buttons are found between the **Search** and **Queue** grids on the right side. Both have two variations, single or all, which will either send/remove individually selected addresses or all at once.

Search For		Search In		Type	From	To	Top	Order By			
		FM Code	{All}		01/05/2022	31/07/2023	500	FM Code	<input type="checkbox"/> Desc	<input type="button" value="Select"/>	<input type="button" value="Select All"/>
►	0001	CUPPB	Cupboard Glob	4 Privet Drive	Little Whinging	Surrey	HP2 001	02001111697	general@cuppb.co	02589632	03698523
►	DCBAT	Wayne Enterpris	1966 Bat Lane		Gotham	New Jersey	BA7 M4N	01966073039	batman@wayne		
►	FTLTD	Fellowship Trans	12 Shire Retail Park		Middle Earth		ME2 O03	0123456789	support@fellows	10122001	29071954
►	SWANC	Swann Customs	184 South Street		Forks	Washington	TW2 008	02008120335	support@swann	59595959	59595959
—											
<input type="button" value="Send"/> <input type="button" value="Send All"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/>											
FM Code	Company Name	Address Line 1	Address Line 2	Town	County	Post Code	Telephone	Email	Account No	Purchase Accou	Credit Limit
► NABOO	Naboo Logistics	197 Wookie Stre		Space	Tatooine	SW1 999	naboo@logistics.01999071620	3216549	3216549		
►	STARK	Stark Enterprise	20 Queen Street		Queens	New York	M4R V3L	02008050258	9876543	9876543	

Send will create a send request for the module to detect. From there, the module will create a new address in Sage, with the same type (e.g. a client address in FM3 will create a client address in Sage).

Whereas the **Remove button** will send the address back to the **top Search grid** (but will only show depending on the filters applied).

To check these addresses have been sent through, you can check the Transmit Log. If they have been sent the status will be 'Sage Sync' and details of the selected line will show on the right.

Freight Manager v3 - x3.9466 - Sage Transmit Log

File Edit View Reports Tools Database Accounts System Window Help

Dashboard Sage Transmit Log

Search For Search In Order By Top

Reference Type Status Last Transmit

WOOOLCOOL Address SageSync 22/12/2022 13:53:30

PLANE2SE Address SageSync 22/12/2022 13:53:29

ORIONAIR Address SageSync 22/12/2022 13:53:28

LATTERDA Address SageSync 22/12/2022 13:53:27

INX002 Address SageSync 22/12/2022 13:53:26

FLOWTECH Address SageSync 22/12/2022 13:53:24

ELEVIEW Address SageSync 22/12/2022 13:53:21

UCH2 Address SageSync 22/12/2022 11:20:34

NEWBEE Address SageSync 22/12/2022 11:20:30

GLO002 Address SageSync 22/12/2022 10:49:49

DAYGARD Address SageSync 22/12/2022 10:49:48

AM1001 Address SageSync 22/12/2022 10:49:47

WAL003 Address SageSync 22/12/2022 10:49:46

FREEDOMF Address SageSync 22/12/2022 10:49:43

SKYWAYS Address SageSync 21/12/2022 17:00:20

SEABRIDG Address SageSync 21/12/2022 17:00:19

KINGFU Address SageSync 21/12/2022 17:00:17

EUROLOG Address SageSync 21/12/2022 17:00:16

COS001 Address SageSync 21/12/2022 17:00:15

VERTEX1 Address SageSync 21/12/2022 15:28:42

UNIROAD Address SageSync 21/12/2022 15:28:42

UCHLOGMA Address SageSync 21/12/2022 15:28:41

TRANSAV Address SageSync 21/12/2022 15:28:40

Type Date Subject

Journal 22/12/2022 13:53:30 Syncing with Sage

Journal 21/12/2022 15:28:20 Syncing with Sage

Journal 11/04/2021 02:00:59 Syncing with Sage

Journal 08/04/2021 17:29:15 Syncing with Sage

Journal 07/04/2021 17:04:58 Syncing with Sage

Journal 06/04/2021 11:11:30 Syncing with Sage

Journal 04/04/2021 02:00:59 Syncing with Sage

Journal 31/03/2021 17:37:44 Syncing with Sage

Journal 30/03/2021 15:09:20 Syncing with Sage

Journal 29/03/2021 19:33:07 Syncing with Sage

Journal 29/03/2021 14:23:23 Syncing with Sage

Journal 29/03/2021 10:15:48 Syncing with Sage

Journal 25/03/2021 17:31:12 Syncing with Sage

Journal 22/03/2021 18:03:45 Syncing with Sage

Journal 22/03/2021 10:18:30 Syncing with Sage

Journal 18/03/2021 01:01:09 Syncing with Sage

Journal 15/03/2021 10:18:44 Syncing with Sage

Balance has changed from

EDI TRANSFER

This transfer page is similar to the usual FM3 transfer page.

1 - Select the batch to transfer

Look at the **available batches** to transfer, use the **filters** to find the batch needed and select it.

Batch Listing Page

2 - Check the Details tab

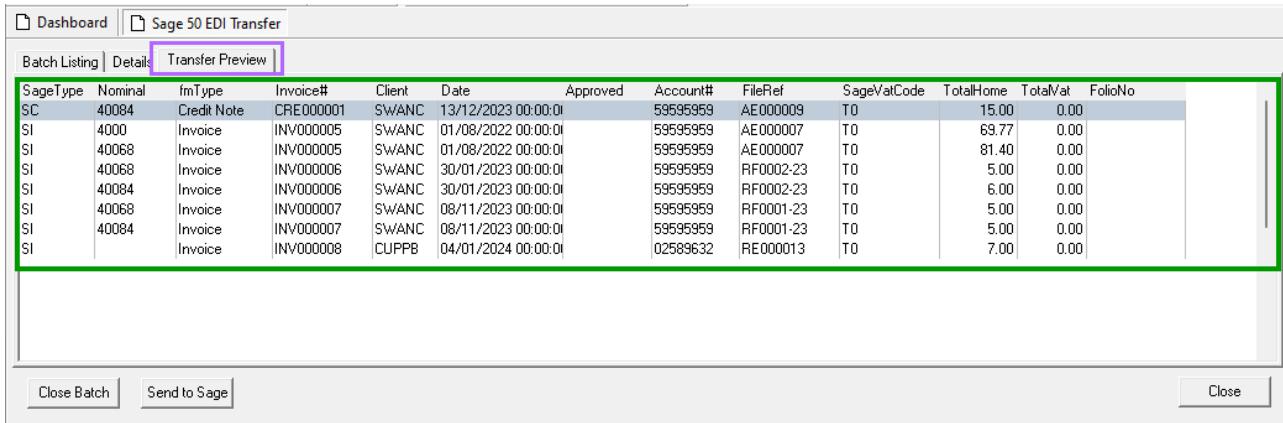
Check the batch **details** within the **Details Tab**.

Information such as invoice type, client, date and monetary breakdowns (amount, home amount VAT etc) are shown within this **details grid**.

Details Tab

3 - Transfer Preview Tab

The preview tab will provide **additional information** to check, notably the Nominal and Sage Type fields, once these are checked and confirmed the batch can be sent.



The screenshot shows the Sage 50 EDI Transfer interface. The 'Transfer Preview' tab is active, indicated by a purple box around its tab label. Below the tabs, there is a table with the following data:

SageType	Nominal	InvType	Invoice#	Client	Date	Approved	Account#	FileRef	SageVatCode	TotalHome	TotalVat	FolioNo
SC	40084	Credit Note	CRE000001	SWANC	13/12/2023 00:00:01		59595959	AE000009	T0	15.00	0.00	
SI	4000	Invoice	INV000005	SWANC	01/08/2022 00:00:01		59595959	AE000007	T0	69.77	0.00	
SI	40068	Invoice	INV000005	SWANC	01/08/2022 00:00:01		59595959	AE000007	T0	81.40	0.00	
SI	40068	Invoice	INV000006	SWANC	30/01/2023 00:00:01		59595959	RF0002-23	T0	5.00	0.00	
SI	40084	Invoice	INV000006	SWANC	30/01/2023 00:00:01		59595959	RF0002-23	T0	6.00	0.00	
SI	40068	Invoice	INV000007	SWANC	08/11/2023 00:00:01		59595959	RF0001-23	T0	5.00	0.00	
SI	40084	Invoice	INV000007	SWANC	08/11/2023 00:00:01		59595959	RF0001-23	T0	5.00	0.00	
SI		Invoice	INV000008	CUPPB	04/01/2024 00:00:01		02589632	RE000013	T0	7.00	0.00	

At the bottom of the interface, there are three buttons: 'Close Batch', 'Send to Sage', and 'Close'.

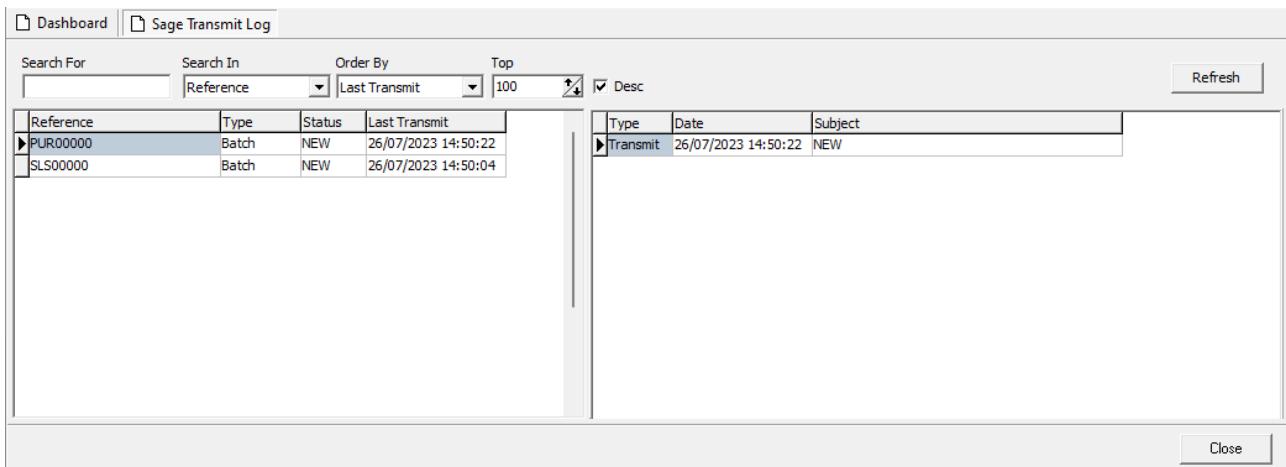
Transfer Preview Page

4 - Sending a batch

Once all details are confirmed, a batch can be sent to Sage by clicking the '**Send to Sage**' button located towards the bottom of the page. This will close a batch if not already closed. You are also able to do this with the '**'Close Batch'** button found next to '**Send to Sage**'.

TRANSMIT LOG

This is a high-level view of everything sent to Sage50 and will be helpful when checking if something has been sent through. It may help to pinpoint where/why it could be stuck and figure out the next steps.



The screenshot shows the Sage Transmit Log interface. At the top, there are search and order by filters. The main area contains two entries:

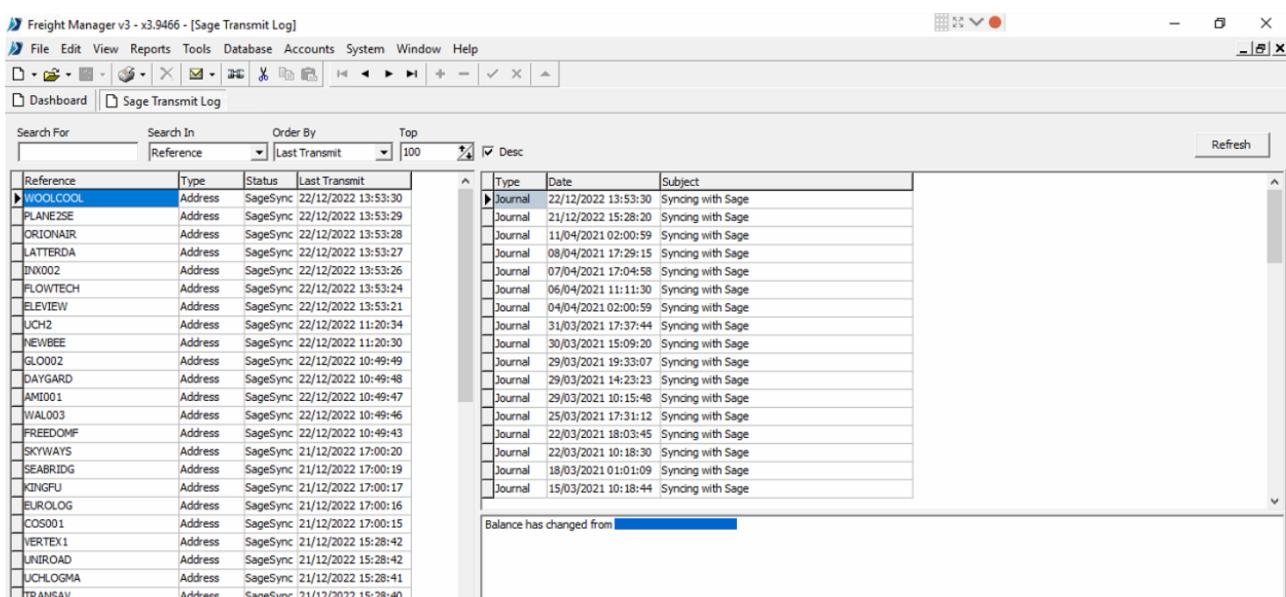
Reference	Type	Status	Last Transmit
PUR00000	Batch	NEW	26/07/2023 14:50:22
SLS00000	Batch	NEW	26/07/2023 14:50:04

On the right, a detailed log shows the transmission of the PUR00000 entry:

Type	Date	Subject
Transmit	26/07/2023 14:50:22	NEW

Example Transmit Log With 2 Entries

Once items are sent, their status can be checked in the Transmit Log, both addresses and Invoice batches will show in the log.



The screenshot shows the Sage Transmit Log interface with a large list of entries. The left pane lists items by reference, and the right pane shows their transmission details. Most entries are SageSync Journal entries, indicating successful syncs with Sage.

Reference	Type	Status	Last Transmit
WOOLCOOL	Address	SageSync	22/12/2022 13:53:30
PLANE2SE	Address	SageSync	22/12/2022 13:53:29
ORIONAIR	Address	SageSync	22/12/2022 13:53:28
LATTERDA	Address	SageSync	22/12/2022 13:53:27
INX002	Address	SageSync	22/12/2022 13:53:26
FLOWTECH	Address	SageSync	22/12/2022 13:53:24
ELEVIEW	Address	SageSync	22/12/2022 13:53:21
UCH2	Address	SageSync	22/12/2022 11:20:34
NEWBEE	Address	SageSync	22/12/2022 11:20:30
GLO002	Address	SageSync	22/12/2022 10:49:49
DAYGARD	Address	SageSync	22/12/2022 10:49:48
AM001	Address	SageSync	22/12/2022 10:49:47
WAL003	Address	SageSync	22/12/2022 10:49:46
FREEDOMF	Address	SageSync	22/12/2022 10:49:43
SKYWAYS	Address	SageSync	21/12/2022 17:00:20
SEABRIDG	Address	SageSync	21/12/2022 17:00:19
KINGFU	Address	SageSync	21/12/2022 17:00:17
EUROLOG	Address	SageSync	21/12/2022 17:00:16
COS001	Address	SageSync	21/12/2022 17:00:15
VERTEX1	Address	SageSync	21/12/2022 15:28:42
UNIROAD	Address	SageSync	21/12/2022 15:28:42
UCHLOGMA	Address	SageSync	21/12/2022 15:28:41
TRANSAV	Address	SageSync	21/12/2022 15:28:40

The right pane shows a detailed log for the first entry:

Type	Date	Subject
Journal	22/12/2022 13:53:30	Syncing with Sage
Journal	21/12/2022 15:28:29	Syncing with Sage
Journal	11/04/2021 02:00:59	Syncing with Sage
Journal	08/04/2021 17:29:15	Syncing with Sage
Journal	07/04/2021 17:04:58	Syncing with Sage
Journal	06/04/2021 11:11:30	Syncing with Sage
Journal	04/04/2021 02:00:59	Syncing with Sage
Journal	31/03/2021 17:37:44	Syncing with Sage
Journal	30/03/2021 15:09:20	Syncing with Sage
Journal	29/03/2021 19:33:07	Syncing with Sage
Journal	29/03/2021 14:23:23	Syncing with Sage
Journal	29/03/2021 10:15:48	Syncing with Sage
Journal	25/03/2021 17:31:12	Syncing with Sage
Journal	22/03/2021 18:03:45	Syncing with Sage
Journal	22/03/2021 10:18:30	Syncing with Sage
Journal	18/03/2021 01:01:09	Syncing with Sage
Journal	15/03/2021 10:18:44	Syncing with Sage

Text at the bottom of the right pane: "Balance has changed from [redacted]".

Additional Help

If you need additional guidance, please contact us via email or telephone.

Tel: +44 (0) 330 223 5813

Email: helpdesk@sigmafreight.com

Website: <https://www.sigmafreight.com/support/>