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.
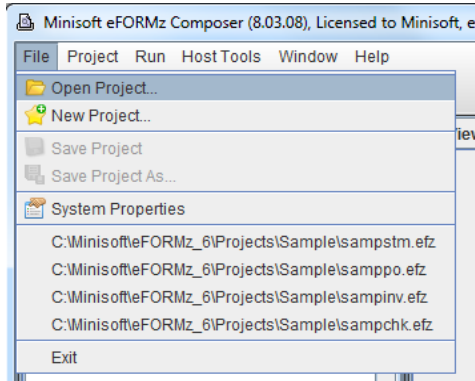
Once eFORMz has been installed, open the eFORMz Composer:

1. From your Start menu, open the eFORMz Composer by selecting *Programs > eFORMz 8 > eFORMz Composer*:
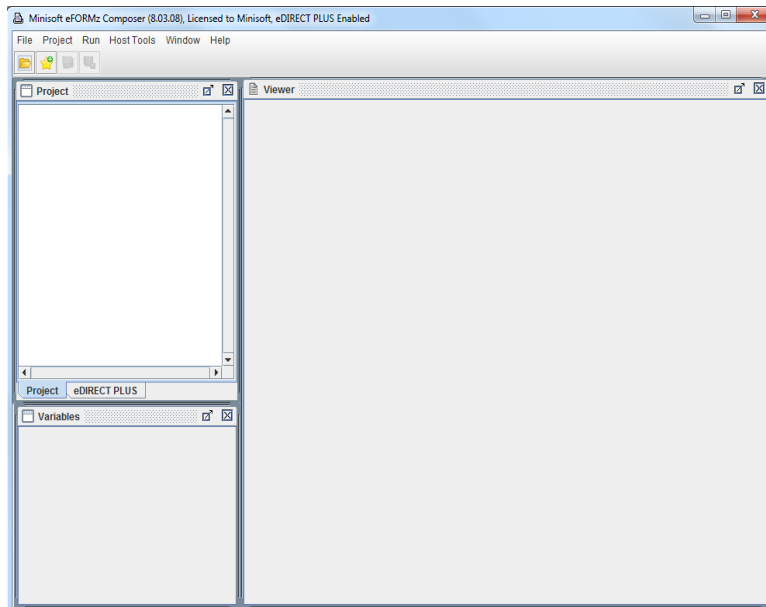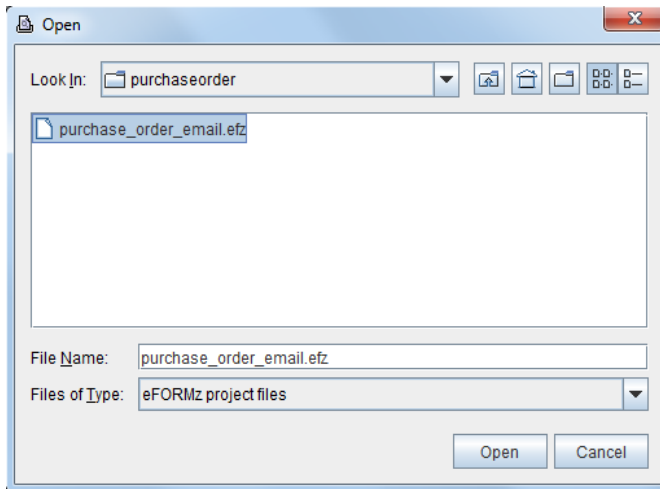
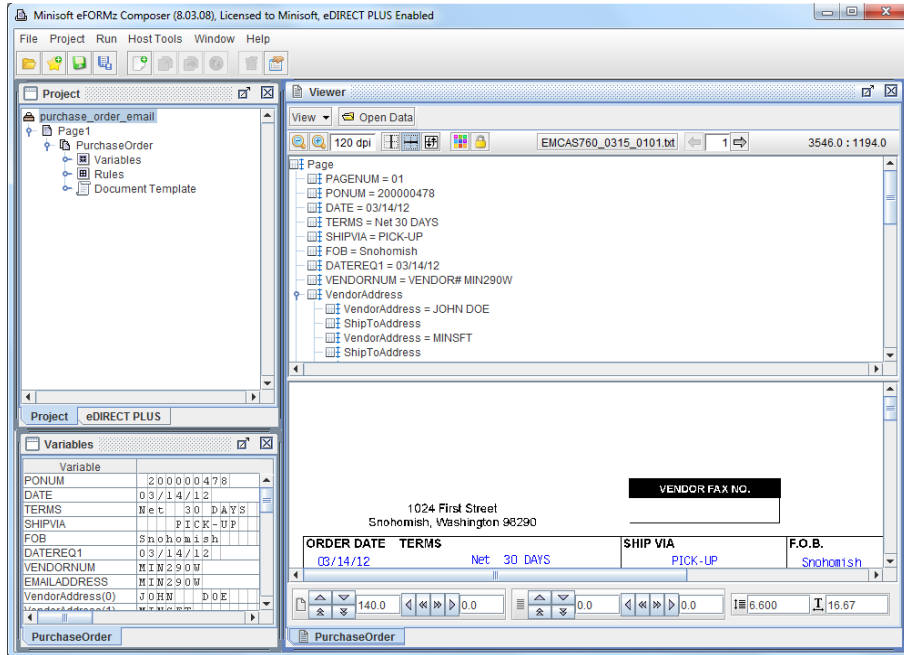2. From the eFORMz Main Menu select *File > Open Project*.

3. Open the following purchase order template by selecting:

    C:\Minisoft\eFORMz_6\Projects\SoftwareProvider_Templates\RedPrairie\DirectCommerce\po\purchase_order_email.efz

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.
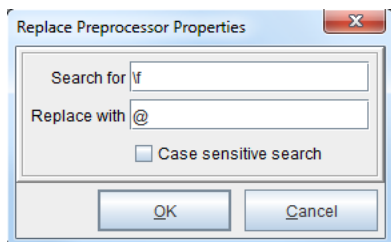

Text File Pagination

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.
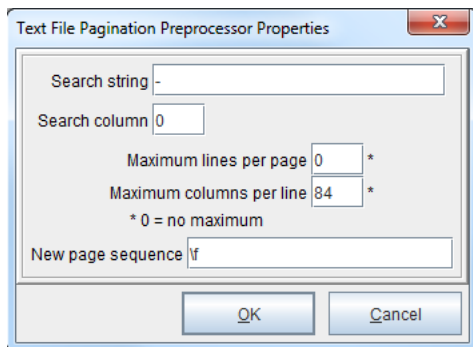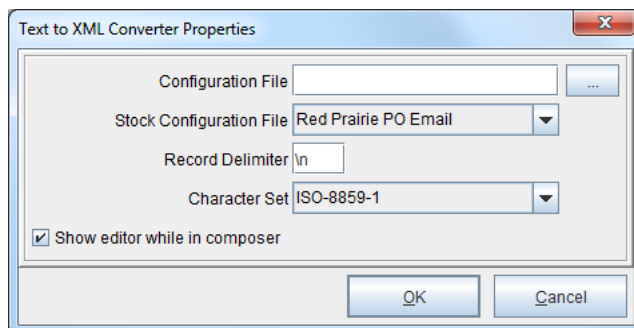
Text to XML Conversion

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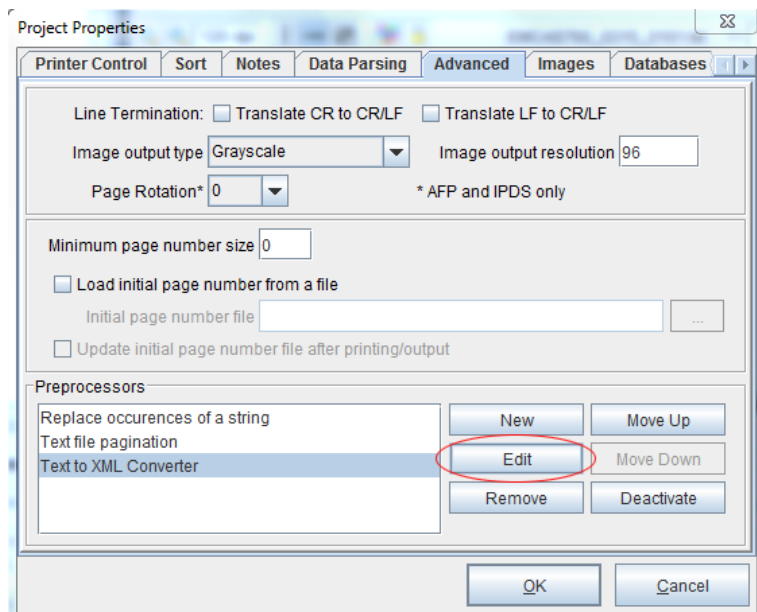
To edit the Text to XML Converter Properties, select *Project Properties > Advanced*. Pick the *Text to XML Converter* and select the *Edit* option.

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:

   C:\Minisoft\eFORMz_6\Projects\SoftwareProvider_Templates\RedPrairie\DirectCommerce\po\purchaseorder.rtf

2. The RTF file will display in Microsoft Word:

3. Make any necessary modifications.
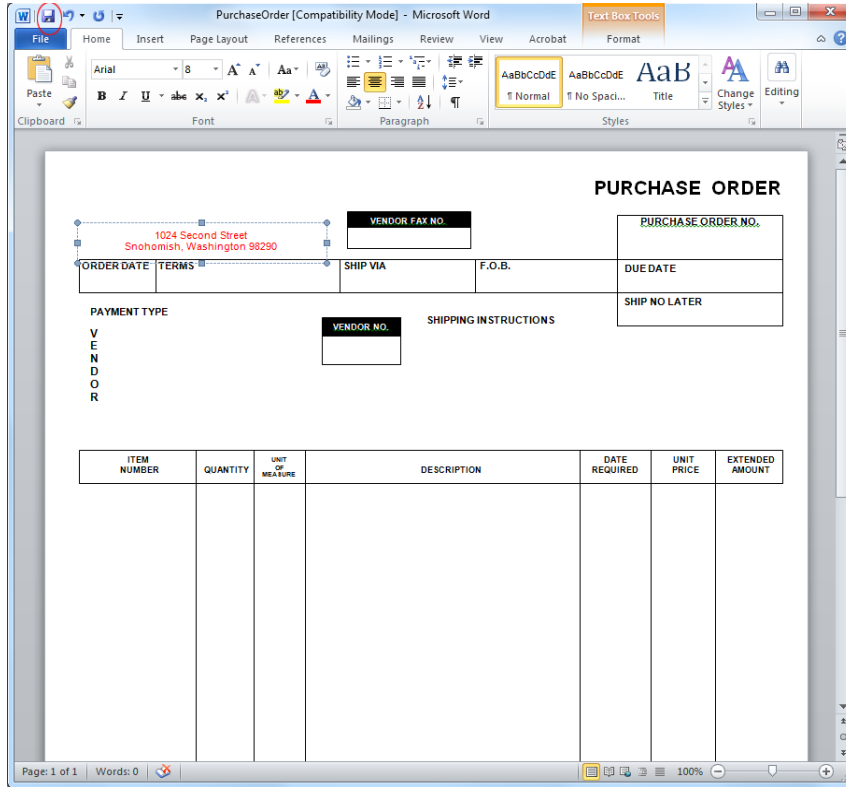
4. Return to the eFORMz Composer. Highlight the form from the Project Window and select the *Reload Form* icon from the toolbar.
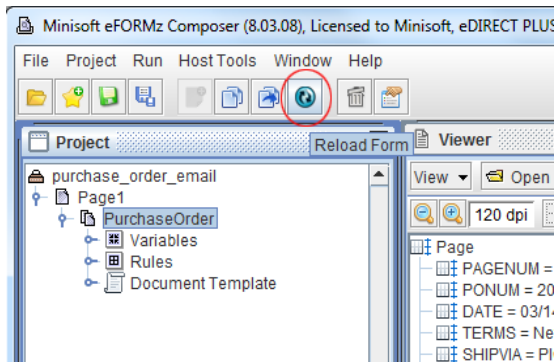
5. The changes will be updated and shown in the Viewer.

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.
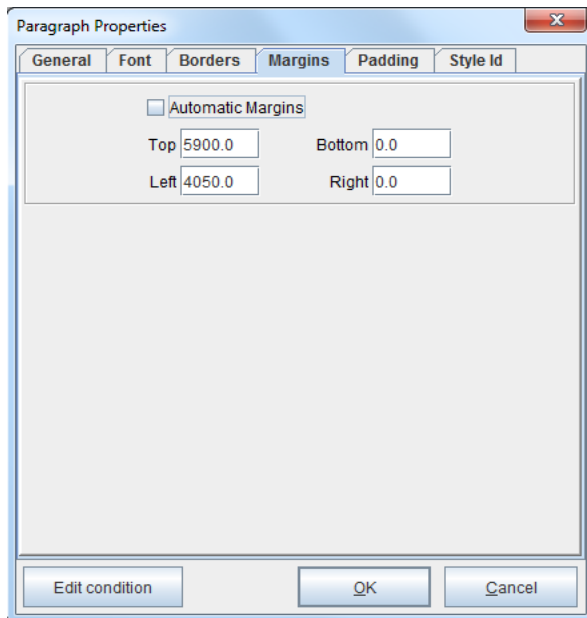
To edit the position of the Document Template:

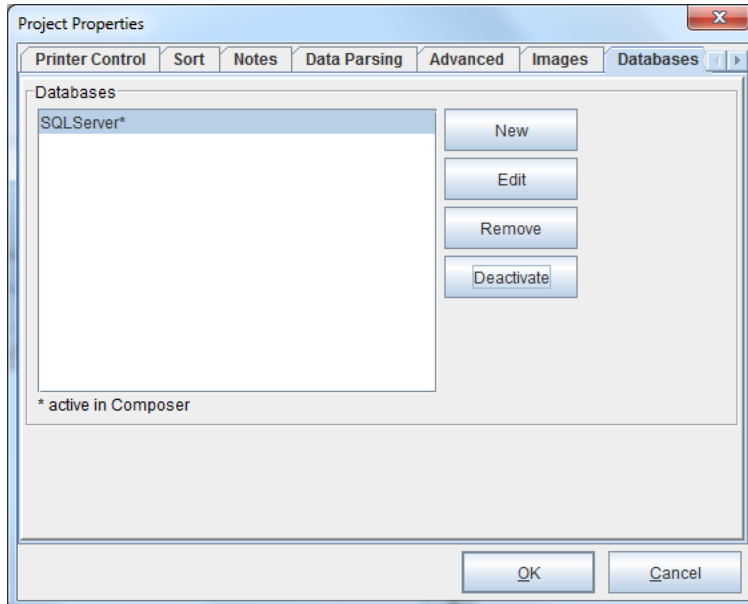1. *Right click* the *Paragraph* element and select *Edit > Margins*.
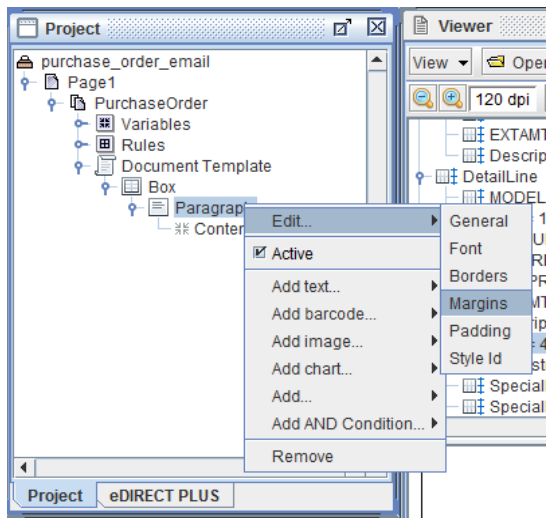
2. Alter the margins as needed.

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).

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

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*.
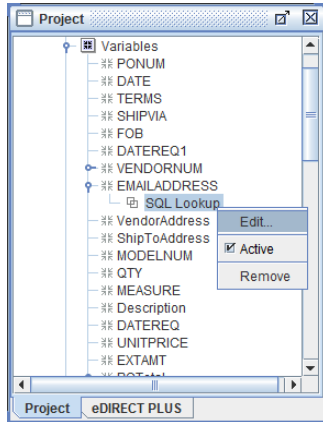

2. The settings will display. Edit the SQL statement, if necessary, and enter the correct table and column the email address resides in. The Parameter added below represents your database key, in this case, the vendor number is our key.
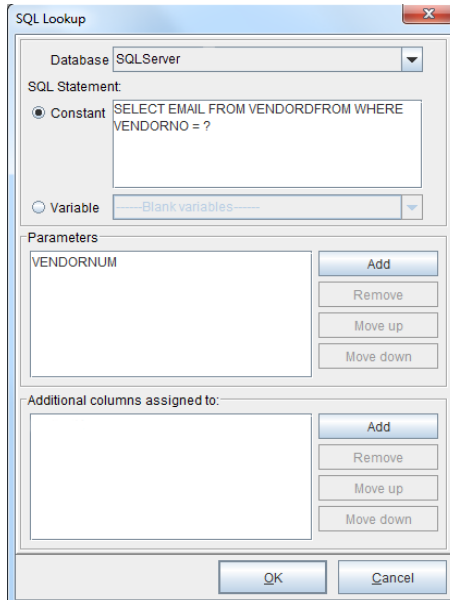
Sort

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.
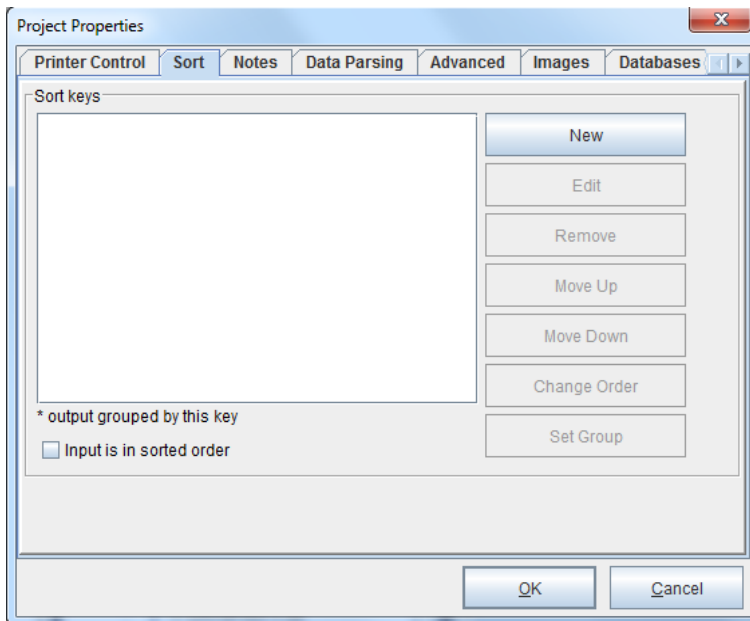
3. Check the *By variable* option and select the variable for the purchase order number ('PONUM') from the drop down menu. Choose the *Ascending* option.
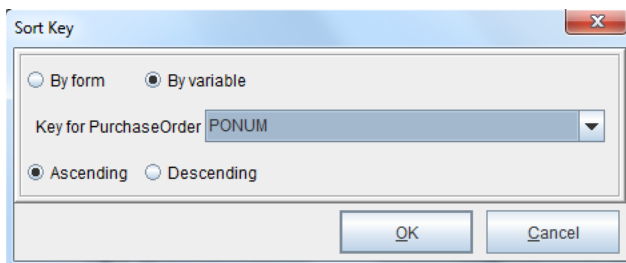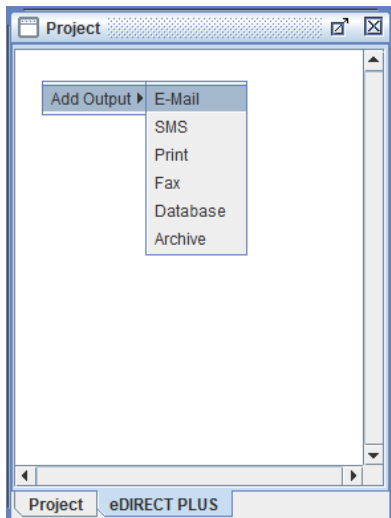
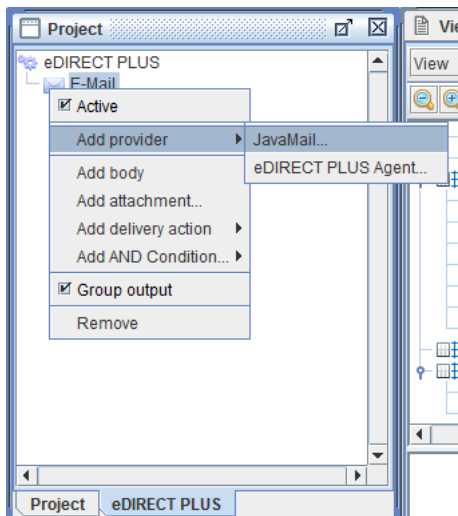4. Select the *Set Group* button. An asterisk will appear after *Ascending* to indicate it has been set.
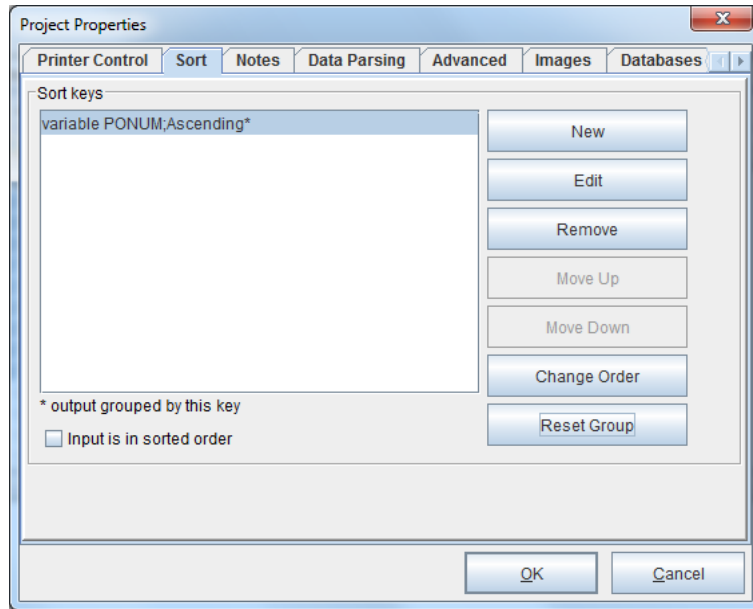
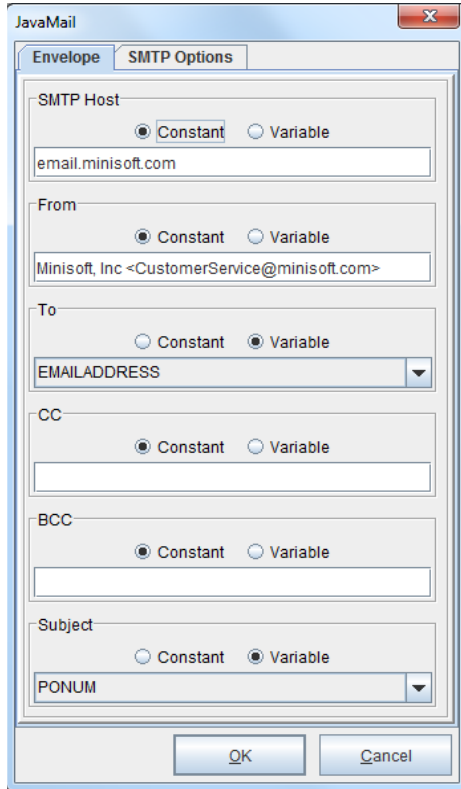# Emailing an Ecometry Purchase Order with eFORMz

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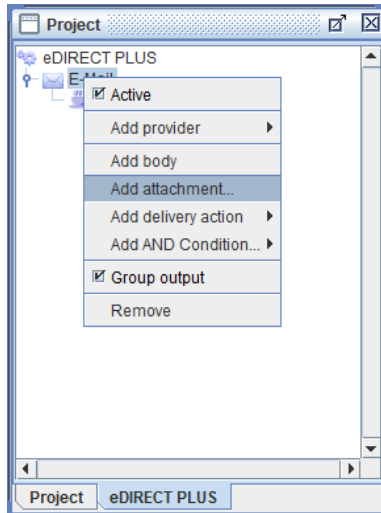

2. *Right click* the *E-Mail* and select *Add provider > JavaMail*.
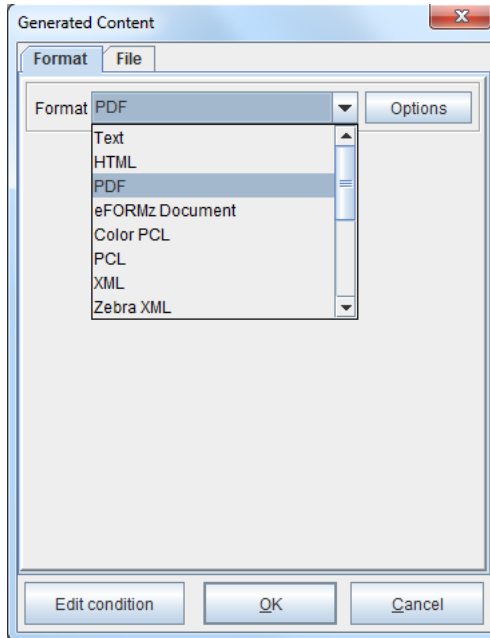
3. Enter values in the respective fields.

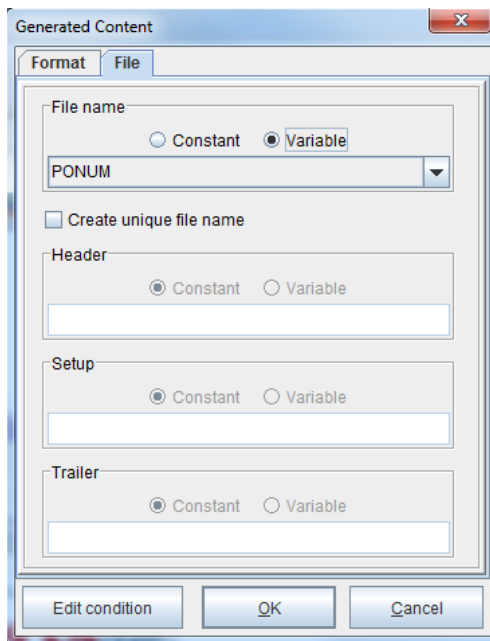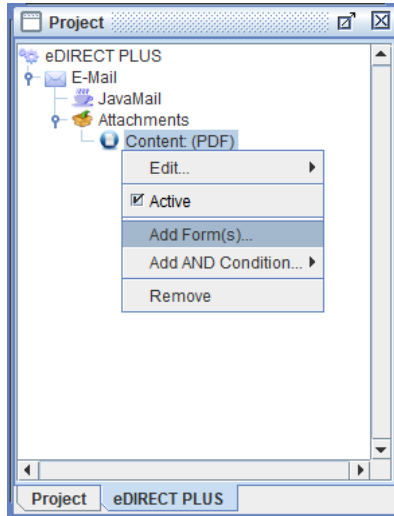4. *Right click* the *E-Mail* and select *Add attachment*.

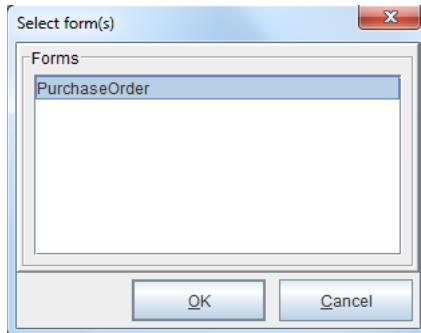5. Choose *PDF* from the drop down menu and navigate to the File tab.

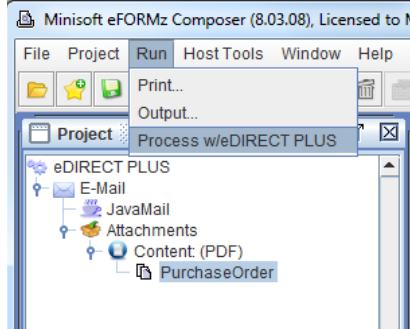6. Select the Variable for the purchase order number.

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


8. Select the appropriate form.

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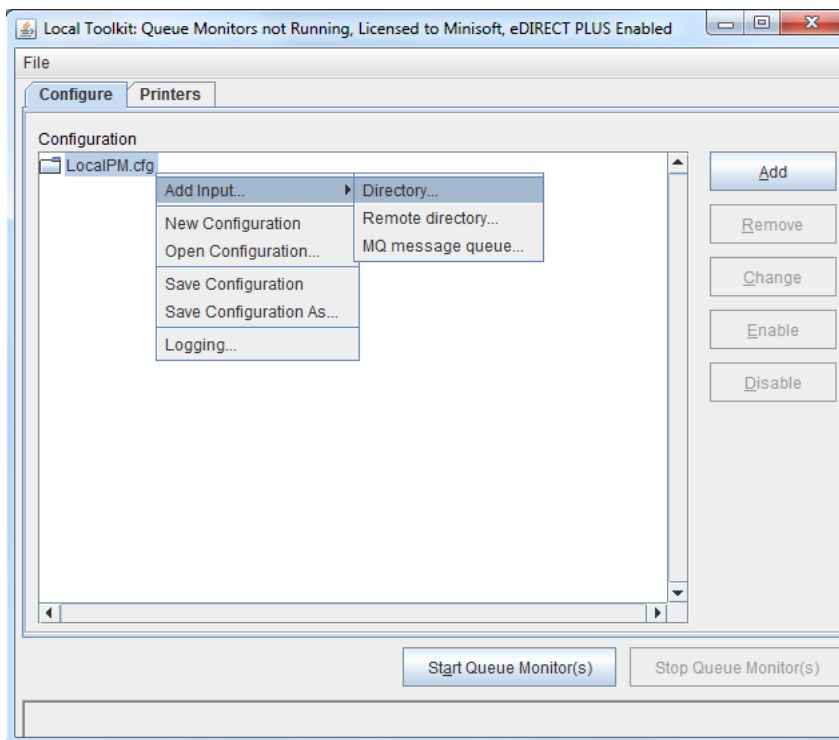
3. Select the browse button (...) for the *Input Directory* and locate the input directory. This is where the source print file will reside and then be pulled to be merged with the eFORMz Project. For Ecometry users this is likely the SPOOLOUT directory, though eFORMz is capabale of monitoring multiple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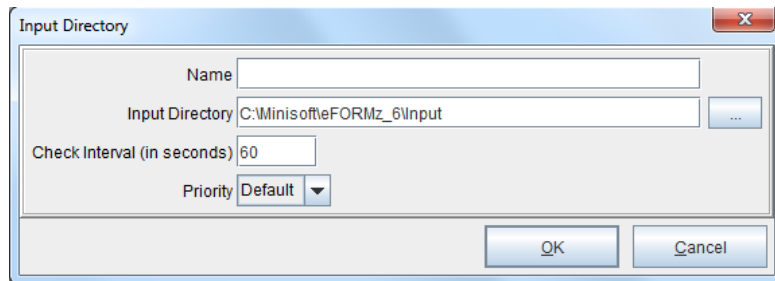

4. *Right click* the *Input Directory* and choose the *Add File Selector* option.
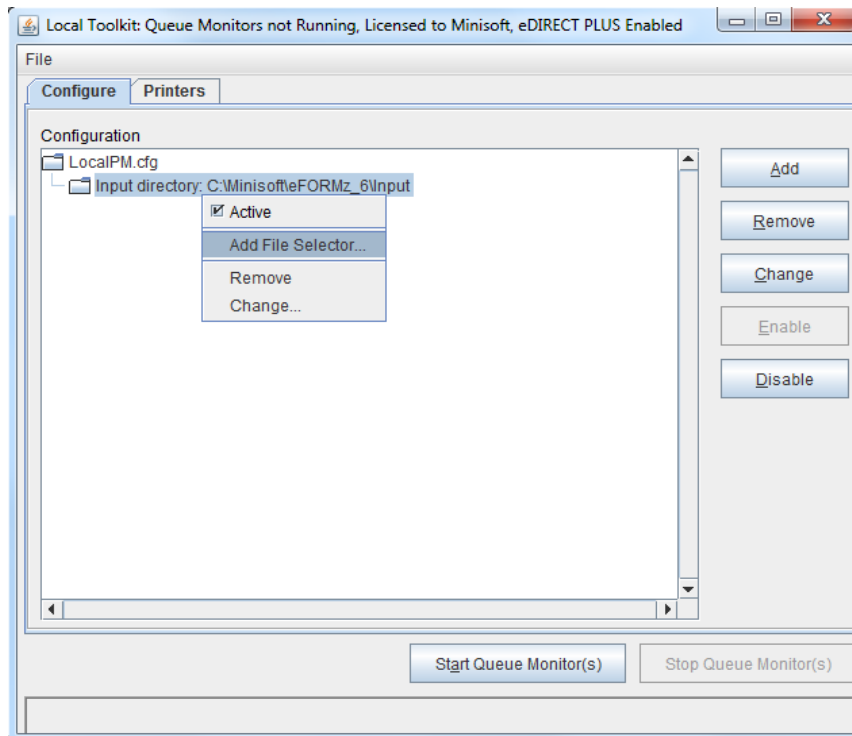
5. Enter the print file that has been selected to merge with the eFORMz Project. In the SPOOLOUT directory, there will be several purchase order data files. In order for eFORMz to pick up and process them all, they can be wildcarded by using an asterisk. Also, be sure to check the *Append ".hld" to the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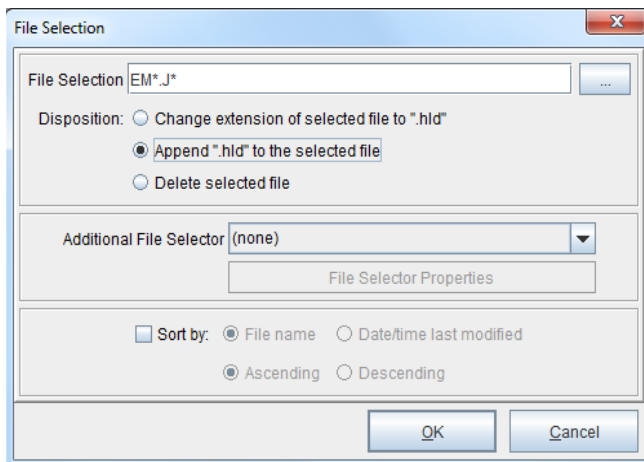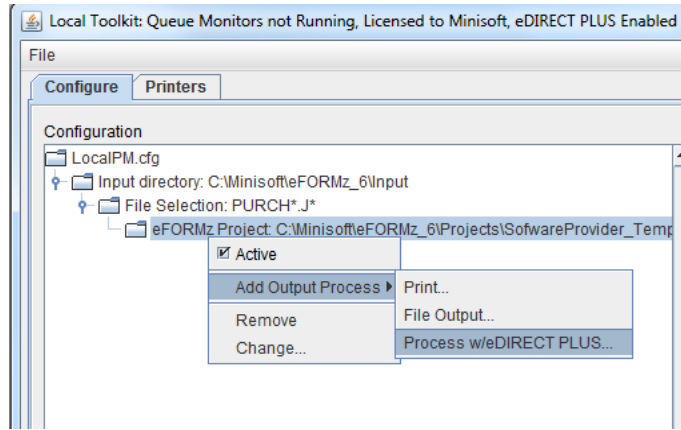

6. *Right click* the *File Selector*, highlight the *Add Processor* and pick the *eFORMz* option.
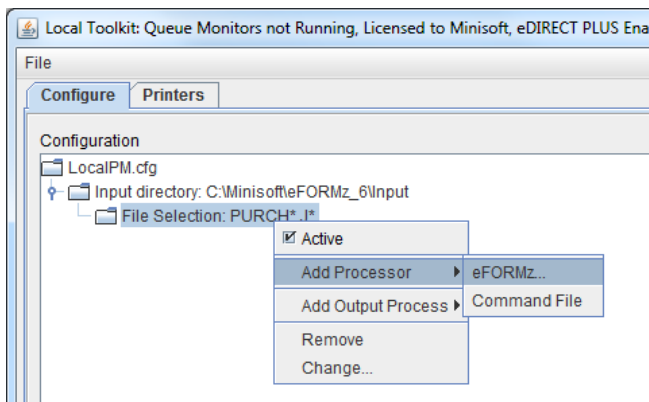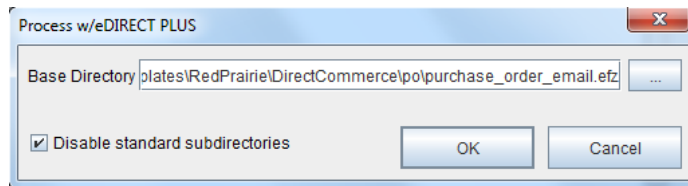

7. Choose the *purchase_order_email.efz* project template.
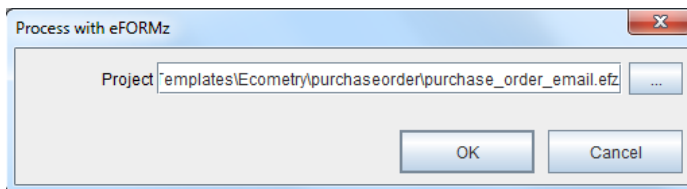
8. *Right click* the *eFORMz Project*, highlight *Add Output Process* and select *Process w/ eDIRECT PLUS*.

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.

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