

A8phocas A Data export Tool for sales information by mgt and reps 6feb19

Phocas is a third party tool for processing pronto data and displaying it to management and reps in an easy format

The global Environment Code “PHOCAS” defines where the documents will be stored , it defaults to \$PROEDI/tmp.

The Config Code Phocas Mode defines the default company rules as per below and the files will be prefixed with the local company code

So that multiple datasets can be processed. Note that the files are created locally then copied to the Phocas Folder.

Export Pronto to Phocas ver 46 Mar1

Methven Australia

Phocas Mode:

Path:

Start date:

End date:

Load Mode (A/B,C/V,T):

The Load Mode question determines how budgets are managed.

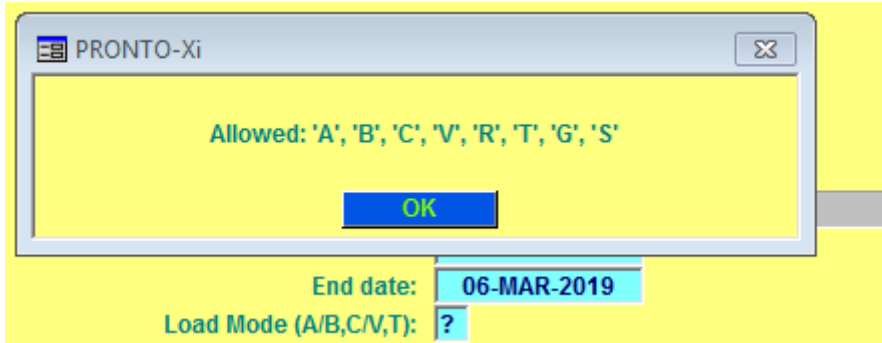
T = a Test mode

G= GL data only

S= Service Jobs Only

A= All Sales Data

C=Changed in last 30 days Sales Data only



All files are output in a .external format (default is Pipe Delimited text with Headings in the first row)

Files are

products (stock Master + prices + qtyonHand + extra sort data)

customers (deb-master, + name address + sort fields)

invoices (stock-movements + extra sort data fields)

sales-order (order header + lines details) (live and archived)

non-product item sales

Suppliers (cre-master)

Purchase orders (header and Lines)

Rep Codes and Names.

Stock Warehouse Details

The currently defined periods start end.

The end as at 7mar19 Ver 50.