



P-Ex Automation *from* Suddensource

Automation to join up your systems

P-Ex Automation was originally a program called Import Control written by the Proactis Group. Its function was to import and Export XML orders, invoices and other documents for transfer to / from a key supplier.

Over the years we have taken this idea and used it in:

- An Automation Control program
- An Automation Windows service

Control Program

Like other programs of ours, this is delivered direct to the end-user using ClickOnce. It does not require MS Office, and is built in 32-bit mode for compatibility. It comprises two screens:

Settings

Service Settings

Use this screen to check connectivity to your database, set any required import and posting details and save the details to a settings file on this machine which P-Ex Automation can use.

File Locations

File	Location
Settings file	C:\ProgramData\Suddensource\PEXSettings.xml
Import folder	C:\Users\Public\Dropbox\Current Work\Automation\Imports\
Export folder	C:\Users\Public\Dropbox\Current Work\Automation\Imports\
Activity log	C:\Users\Public\Dropbox\Current Work\Automation\ActivityLog.txt
eTrading log	
Failure log	C:\Users\Public\Dropbox\Current Work\Automation\FailureLog.txt
Error log	C:\Users\Public\Dropbox\Current Work\Automation>ErrorLog.txt

Credentials (for action)

☒ Use logged on credentials

User name:

Password:

Database:

Server:

☐ Use Windows authentication

Overall timer options

☒ Timer to fire every 10 mins

☐ Timer to fire daily at

☐ Timer to fire weekly on <Select Day> at

Delay other timers (secs) 15

Posting eTrading Mobile Stock

☐ Enable Posting

Timer options (Posting)

☒ Use overall timer

☐ Timer to fire every 10 mins

☒ Skip 20.00 - 06.00

☐ Timer to fire daily at

☐ Timer to fire weekly on <Select Day> at

Post using

☒ Logged on credentials

☐ Credentials (for action) as left

☐ Credentials from PX

☐ Credentials entered below

User name:

Password:

Database:

Server:

General posting options

☐ Post to PSF

☐ Post XREFs

☐ Post using reversals as set

☐ Hold sales invoices/credits

☐ Hold purchase invoices/credits

☐ Allow posting to future

Seafood posting options

☐ Post intercompany stock adjustment

☐ Post DAFs on invoices

Post documents dated on/after: 09 March 2023

Alerts

Specify recipients for alerts. Separate addresses with semi-colons (and without spaces).

System options

☐ Use standard XML Location

SMTP Server

Suddensource

Help Save Cancel

Running the program on the server where the service will run, settings are set above and saved to an XML file on the machine, which the service reads on startup.



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Testing

This screen lets you test the service you have set up. It employs the same code and settings as the Windows service itself will use.

Services

Over the years, we have configured services such as:

- Adding budgets to Dream;
- Adding finance accounts based on venue bookings in another system;
- Posting authorised documents to your finance system;
- Database housekeeping tasks;
- Interchange of data with a tablet-based system;
- Importing data from a factory floor data capture system;
- Importing data from our own mobile stock system;
- Synchronising data between two P-Ex databases;
- Automating takings data and importing bank statements for a multi-branch organisation;
- Export of POs and Import of invoices in BASDA eBIS XML format;
- Creating daily updates to a data warehouse system;
- Importing meter reading data to a landlord's energy billing system (not shown);

We have also done internal systems (not shown) to:

- back up files across a remote network;
- Clear files of a certain age from specified locations;

For information about P-2, the original program, please download one of our P-2 brochures:

- Overview
- Order Processing
- Stock Control
- Invoicing
- Features



Test the windows service...

This screen allows you to carry out the actions which the service will do, but simply by clicking on 'Start' to initiate the process and 'Stop' to end it. The 'Stop' button will be unavailable while the program is busy.

The process which runs is identical, and so is useful for testing, debugging and trying out the service on a machine other than the intended target.

The activity monitor below tells you what the service is doing.

- ☐ Test budget import
- ☐ Test Artifax import
- ☐ Test Spare3
- ☐ Test Spare4
- ☐ Test posting
- ☐ Test EPL
- ☐ Test Line Scanner
- ☐ Test Mobile Stock
- ☐ Test Synchronisation
- ☐ Test F1 Takings
- ☐ Test F1 Statements
- ☐ Test eTrading
- ☐ Test Data Warehouse

☒ Test now (ignore timer) ☐ Verbose logging

Activity: **None**

Files **0**

Suddensource Ltd
1 Ambarrow Crescent
SANDHURST
GU47 8JA
☎ 01252 871100
sales@suddensource.com
www.suddensource.com