

Electronic Data Exchange between Companies (Same Installation/ Separate Installations)

Aim

Transferring data automatically between companies in the same installation or to companies in another installation using data interface exchange (EDI).

To define custom data interfaces, see the [SOP: Defining an Electronic Interface](#).

If you are upgrading from the old Data Exchange service (versions 21.0 and below), see additional instructions in the appendix.

Note: The instructions in this document are aimed at system administrators.

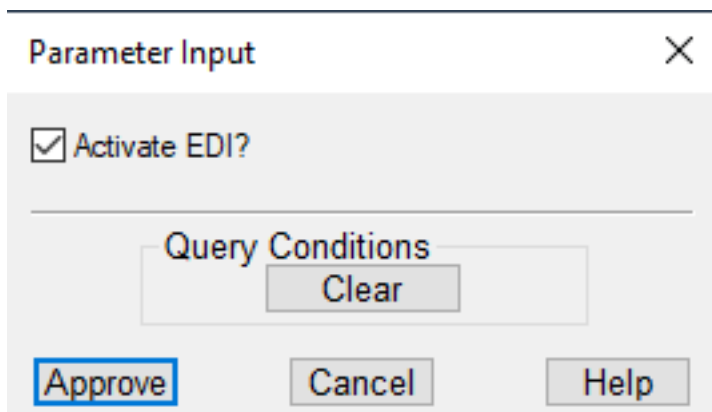
Working Assumptions

- All the companies sharing data between them are on the **same version** of **Priority**.
- You have purchased the **Data Exchange** module.
- Users in version 21.0 must first download and install the **Version 21 Data Exchange** addon. This can be downloaded from Priority Xpert's [Downloads](#) page.

Process

Stage I: Installing the Application Service and Activating Data Interface Exchange

To transfer data between companies, start by [Installing the Application Server](#). If it is already installed, install it again. The installation program recognizes that you own the **Data Exchange** module and will offer to install the Data Exchange component.



Data Exchange installation option

If you are planning on transferring data between companies in separate installations, make sure you also enable the [Priority Gateway](#) as part of the installation.

Note: The data exchange mechanism is a component of the Priority Application Server. There is no additional service added to the server.

Stage II: Defining Companies for Data Exchange

Define the following in only one of the companies:

1. Open the [Define Comps. for Data Exchange](#) form. In it record the companies to which you wish to transfer data, or want to receive data from them.
2. Record **Company Description**.
3. For a company in the same installation:
 - Record the **Company Name** as it appears in the **Companies** form.
 - Check both the **Incoming from Comp.** and **Outgoing to Company** boxes.
4. For a company in a separate installation:
 - Record the **External Access ID** of the company in the Gateway. The system administrator of the other installation can find this ID in the same field in the **Companies** form.
 - Check the **Incoming from Comp.** box if you receive data from this company.
 - Check the **Outgoing to Company** box if you send data to this company.

Stage III: Linking Companies to Customers and Vendors

Aim: Linking the companies defined in the previous stage to customers and vendors in the system.

1. Open the [Customer Definitions](#) form. For customers with whom you exchange data, select the customer in the **Customer Number** field, and then choose their company in the **Data Exchange Comp.** field.
2. Open the [Vendor Definitions](#) form. For vendors with whom you exchange data, select the vendor in the **Vendor Number** field, and then choose their company in the **Data Exchange Comp.** field.

Result: Data exchange companies have been defined and linked to customers/vendors if necessary.

Stage IV: Data Interface Definitions

Aim: Recording definitions for active data exchange interfaces.

Definitions for Outgoing Data Interfaces

1. Open the [Data Exchange Definitions](#) form.
2. Move to the line of the interface you want active, and fill in following:
 - **Active (Outgoing)** - check this box to send data to other companies through this interface.

- **Automatic Outgoing** - outgoing interfaces can be set to run automatically whenever you leave a record in the relevant form. If left unchecked, the interface must be sent manually through the command in the **Mail** menu.
- **Nonparallel Outgoing** - by default, interfaces of the same type are sent in parallel. For example, an interface of parts sends multiple parts at once. Check this box in cases where the order of transmission is critical. For example, if you first define a representative customer for the next few customers you open. Generally, you can leave this box empty and only check where parallel transmission causes issues.
- **Outgoing Notifcat'n** - choose a value from the list based on the type of messages you want to receive about outgoing interfaces.

Definitions for Incoming Data Interfaces

2. Move to the line of the interface you want active, and fill in following:

- **Active (Incoming)** - check this box to receive data from other companies through this interface.
- **Update Incoming Data** - check this box so that updating a record in the source company will also update it in this company (the receiving company). If left empty, only new records will be sent by interface, while updates to existing records will be ignored.
- **Nonparallel Outgoing** - check this option to allow receipt of this interface from any organization - that is, the system will not check if the company that sent the interface appears in the **Companies for Incoming Data** sub-level. If left unchecked, the companies from which this interface can be received must be added in this sub-level. Regardless of whether this box is checked or not, source companies must be checked as **Incoming from Comp.** in the [Define Comps. for Data Exchange](#) form.
- **Outgoing Notifcat'n** - choose a value from the list based on the type of messages you want to receive about outgoing interfaces.
- To limit the transfer of data in an incoming interface (such as an interface that opens a sales order, but which should not update the unit price), use the **Block Data Receipt-Form Columns** sub-level. Enter the form that contains the data to be blocked in the **Form** field, and select the field to block in the **Column in Form** field.

Stage V: Initiate Outgoing Interface Manually

Aim: Manually initiating an outgoing interface (if it is not run automatically)

1. In the source company, open the appropriate form and locate the record to be sent.
2. From the **Mail** menu, select the **Exchange Data** option.

Stage VI: Track Incoming and Outgoing Data

Aim: Track and identify data interfaces sent from the source company and received in the target company.

1. In the source company, open the [Outbox Journal](#) form. Locate the relevant interface and check whether it was received in the target company or there was some sort of error.
2. In the target company, open the [Inbox Journal](#) form. Locate the relevant interface and check that it was received successfully. If there were any errors, they are listed in the **Details of Errors** sub-level.

Appendix: Migrating from Data Exchange Server

If you already use the Data Exchange module, this appendix contains useful information for migrating to the new method.

Before Installing the Application Server

Before installing the application server, you must first stop and uninstall the existing Priority Data Exchange service from the existing Data Exchange server.

Note that the Data Exchange server will stop operating as soon as you install the **Version 21 Data Exchange** add-on.

Migrating from Emails to Companies

The old data exchange mechanism used emails to identify participants in the data exchange.

The new system uses company identifiers.

To assist in migration, after defining companies in the [Define Comps. for Data Exchange](#) form, you can use the **Update Interface by Email** action. In the input, record an email address, and the system will replace that email with the current company (or company identifier) in the following forms:

- **Data Exchanges Definitions > Recipients of Outgoing Data**
- **Customer Definitions**
- **Vendor Definitions**