



Warehouse & Manufacturing Plugins for Acumatica

INSTALLATION GUIDE

V.18.12.14.0

SCANCO – WWW.SCANCO.COM
SUPPORT: 330.645.9959
FAX: 330.645.9969
EMAIL: SUPPORT@SCANCO.COM

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Publish Date: 12.14.2018

Scanco Software, LLC

1000 N Tamiami Trail

Suite 201

Nokomis, FL 34275

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Introduction

Scanco warehouse and manufacturing plugins are Acumatica-based and developed to synchronize data between Acumatica and Scanco.

Plugins allow the mobile client to access Acumatica to create transactions and validate data. The transactions will appear on Scanco's Customer Service Portal, allowing you to review and reprocess any potential rejected transactions.

Plugins may be installed by your reseller, a member of the Scanco installation team, or your internal system administrator. It is recommended, however, that plugins are installed by your reseller.

Before You Begin

- All procedures are best performed when there are no active users in the system.
- Ensure the Acumatica Warehouse and/or Manufacturing clients are installed before installing plugins. For more information, see the *Acumatica Warehouse & Manufacturing Clients – Installation & Configuration Guide*.
- Ensure you have all the required personalized settings for your company as described in *Personalized Client Settings for Acumatica – Reference Guide*. These settings may be used to complete some configurations.

This guide references the Scanco Customer Service Portal for Acumatica, or simply the portal. The portal is where you configure features and functions for your company. For more information, see *Scanco Customer Service Portal for Acumatica - Administrator Guide*.

Warehouse vs. Manufacturing Plugins

NOTE: In this guide and throughout the Acumatica Web site, Warehouse and Distribution are synonymous. For the purposes of this guide, the name "Warehouse" will be used.

There are two types of plugins; Scanco Warehouse and Scanco Manufacturing plugins. Both have similar features and functionality, and are installed the same, however:

- **IMPORTANT:** The Warehouse plugin is required in order for the system to operate correctly. Manufacturing relies on information that the Warehouse app provides. Therefore, even if your company is only using Manufacturing, the Warehouse plugin must be installed.
- The Scanco Manufacturing plugin should only be installed when it will be used.
- The Warehouse and Manufacturing plugins may be installed and published at the same time, but DO NOT install or publish the Manufacturing plugin before the Warehouse plugin.

Process for a Successful Installation

The following can be used as a check list to ensure installation is performed in the correct order. Instructions to complete the install process are provided in this guide or other guides as noted.

Process Step	Task	Notes
Prerequisite	Install the Acumatica Warehouse and/or Manufacturing client on handheld and/or mobile devices before installing plugins.	See <i>Acumatica Warehouse & Manufacturing Clients – Installation & Configuration Guide</i> .
1	Download plugins appropriate for your version of Acumatica.	
2	Install plugin(s).	
3	Publish Warehouse plugin.	You may publish both plugins at the same time, but <u>do not</u> publish the Manufacturing plugin before Warehouse's.
3a	If installing the Manufacturing plugin, publish this either at the same time as the Warehouse plugin or afterwards.	
4	Configure plugins.	Scanco can configure plugins for you.
5	Sync Warehouse plugin.	
5a	Sync Manufacturing plugin (if the Manufacturing client is installed).	<u>Do not</u> synchronize the Manufacturing plugin before the Warehouse plugin.

Downloading Plugins

You can download plugin ZIP files from Scanco's Customer Service Portal. File names include the date the plugin was built and the plugin version. For example, **20170530_Distribution6.1.zip** indicates the plugin was built May 30, 2017, is compatible with Acumatica version 6.0, and has had a minor version change (.1) from the major version's release.

To download plugins

1. In your browser, go to **<https://acumatica.scancocloud.com>**.

NOTE: You do not need to log into the portal.

2. Click **Downloads**.
3. Click the **Acumatica** tab. Then, click **Download** to install the specific plugin(s) for your version of Acumatica.



Installing and Publishing Plugins

NOTE: This procedure is best performed when there are no active users in the system.

IMPORTANT: The Scanco Manufacturing plugin can be uploaded and published at the same time as the warehouse plugin, however, it must not be published before the warehouse plugin.

To install and publish plugins

1. In a browser, open the **Acumatica** Web site.



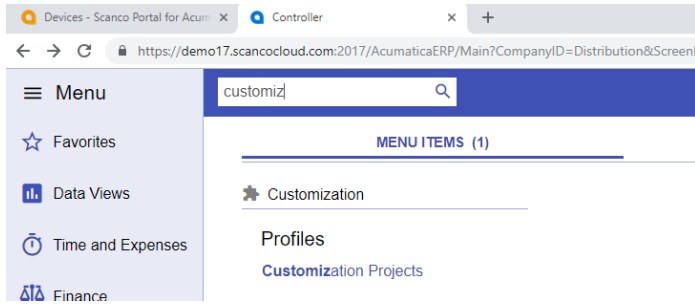
Admin

.....

Manufacturing

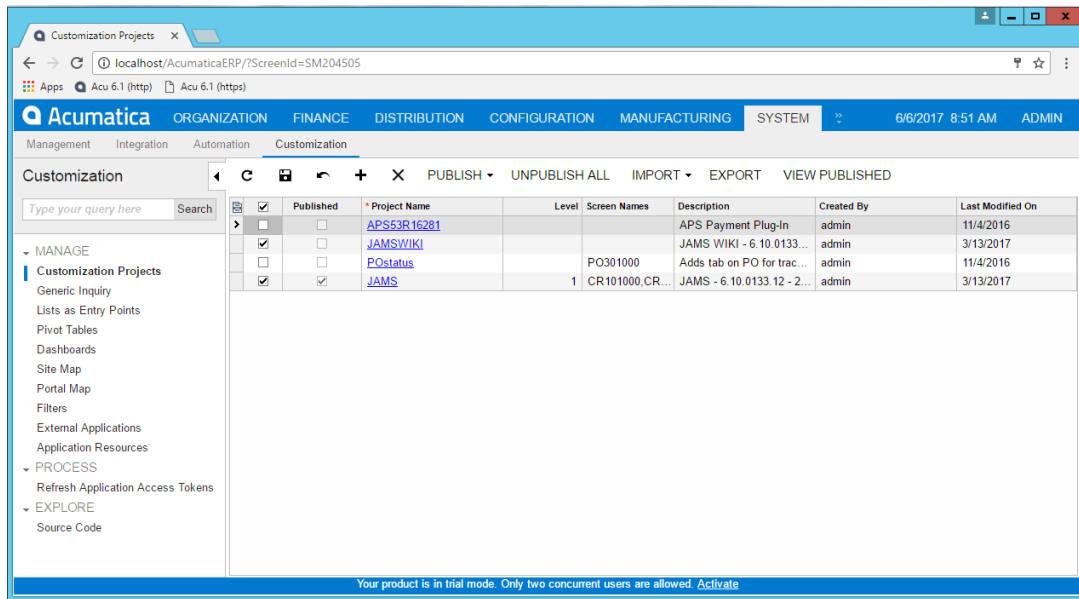
Sign In

2. Enter your **User Name** and **Password**.
3. Select the company for which you are installing the plugin. Click **Sign In**.
4. Navigate to Customization Projects by typing "customization projects" in the **Search** field. Then, click the **Customization Projects** link.



TIP: Using Search is the fastest way to navigate to any screen.

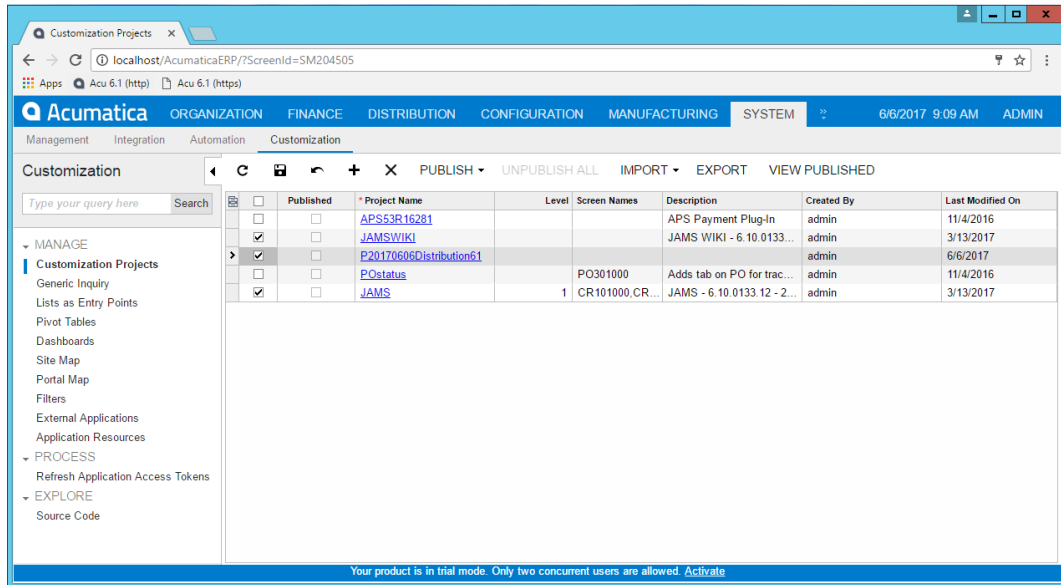
IMPORTANT: Before you can publish a new plugin, you must unpublish what is currently published. Then, you will republish the existing plugins along with your new plugin.



Depending on how you arrive at the above screen, you may have to select to the System tab.

5. On the **System** tab, select all plugins by clicking the check box as shown above. Click **Unpublish All**
6. Click **Import**.
7. When the Open Package dialog appears, click **Choose File**. Then, browse to and select a Distribution installation pack. Click **Upload**.

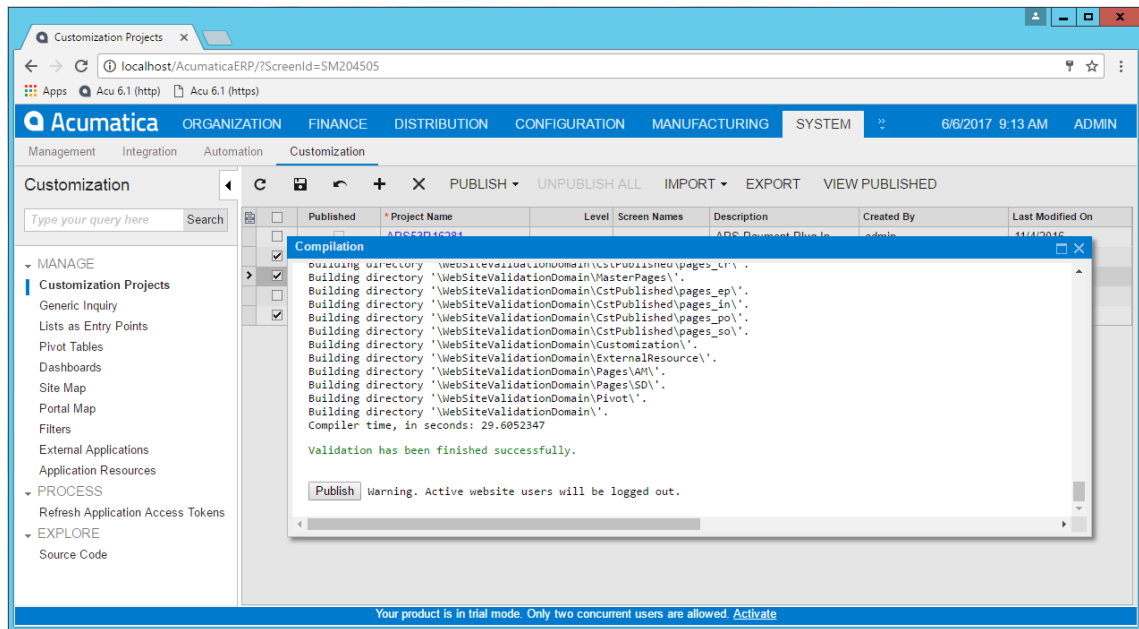
The list of plugins appear.



8. Do one of the following:

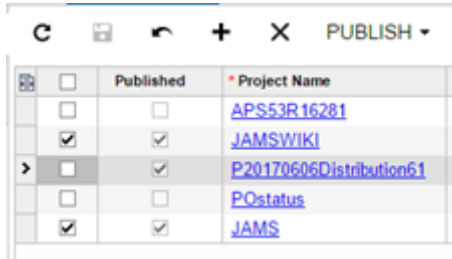
- To publish to the company you have in view: In the far, left column, select the plugins you want to publish. Click **Publish**.
- To publish to multiple companies: From the **Publish** button, select the companies you want to publish to. Then, in the far, left column, select the plugins you want to publish. Click **Publish**.

Acumatica will begin building directories for the published plugins.



9. When complete, a message appears indicating the directories have been built. In the Compilation window, click **Publish**.

When the compilation is finished and plugins have been published, you will receive a confirmation message stating, "Website has been updated." As well, the window will return with a check mark next to each plugin that has been published, as identified in the Published column.



The screenshot shows a software window with a toolbar at the top containing icons for refresh, save, undo, add, and delete, along with a 'PUBLISH' button. Below the toolbar is a table with the following data:

	Published	Project Name
<input type="checkbox"/>	<input type="checkbox"/>	APS53R16281
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAMSWIKI
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	P20170606Distribution61
<input type="checkbox"/>	<input type="checkbox"/>	POstatus
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	JAMS

Next Steps for Configuring your Plugin

In most installations, configuring plugins is performed by a member of the Scanco Installation team. Choose one of the following:

- If you are not configuring plugins, contact your Scanco Installer to let them know your plugin is published and requires configuration.
- If you are configuring plugins, continue with the steps in *Configuring the Scanco Warehouse Plugin* and/or *Configuring the Scanco Manufacturing Plugin* described in this guide.

Configuring Plugins

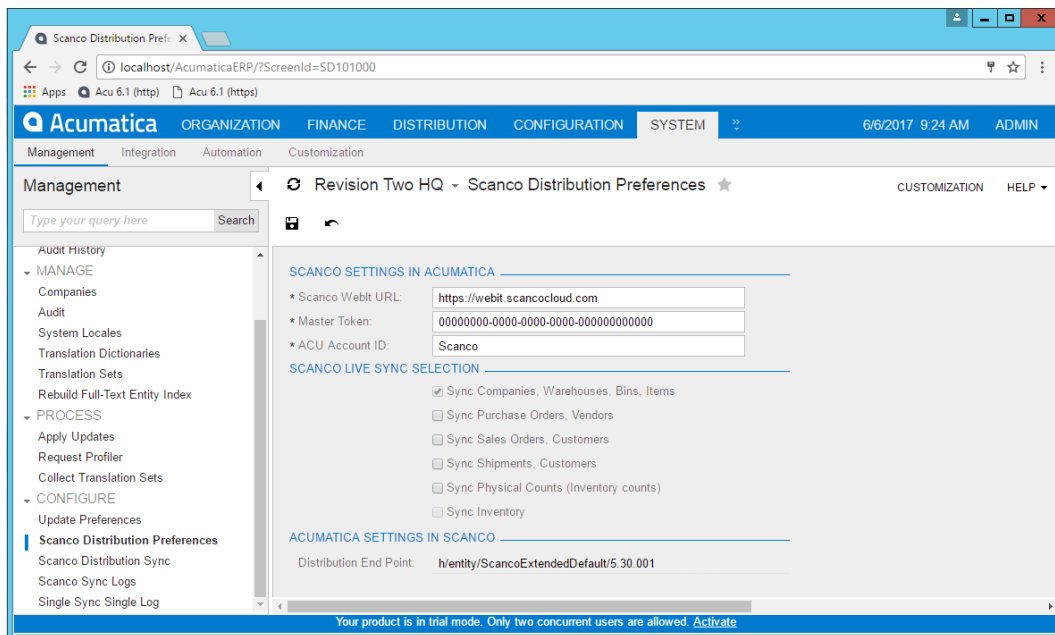
This section describes configuration for the warehouse plugin. To configure the Scanco Manufacturing plugin, see *Configuring the Scanco Manufacturing Plugin*.

Configure the Warehouse Plugin

NOTE: If you are reinstalling, before configuring the plugin, reference your *Personalized Client Settings* guide for your Master Token and CRM ID.

To configure warehouse plugins

1. Log into **Acumatica**.
2. Navigate to Distribution Preferences by typing “distribution preferences” in the **Search** field. Then, click the **Scanco Distribution Preferences** link. (Alternatively, browse to the System tab, click the Management link, and then select Scanco Distribution Preferences.)

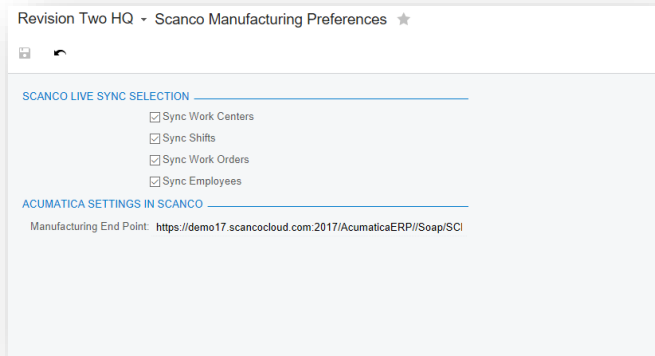


3. Ensure the **Master Token** and **CRM Account ID** fields are set to the value provided by the Scanco Installation team. (Reference your personalized client settings.)
4. Under **Scanco Live Sync Selection**, select all appropriate options for your configuration.
5. Click the **Save** button.

Configure the Manufacturing Plugin

To configure manufacturing plugins

1. Log into **Acumatica**.
2. Navigate to Manufacturing Preferences by typing “manufacturing preferences” in the **Search** field. Then, click the **Scanco Manufacturing Preferences** link. (Alternatively, browse to the System tab, click the Management link, and then select Scanco Manufacturing Preferences.)



3. Select all options under **Scanco Live Sync Selection**.
4. Click the **Save** button.

Synchronizing Plugins

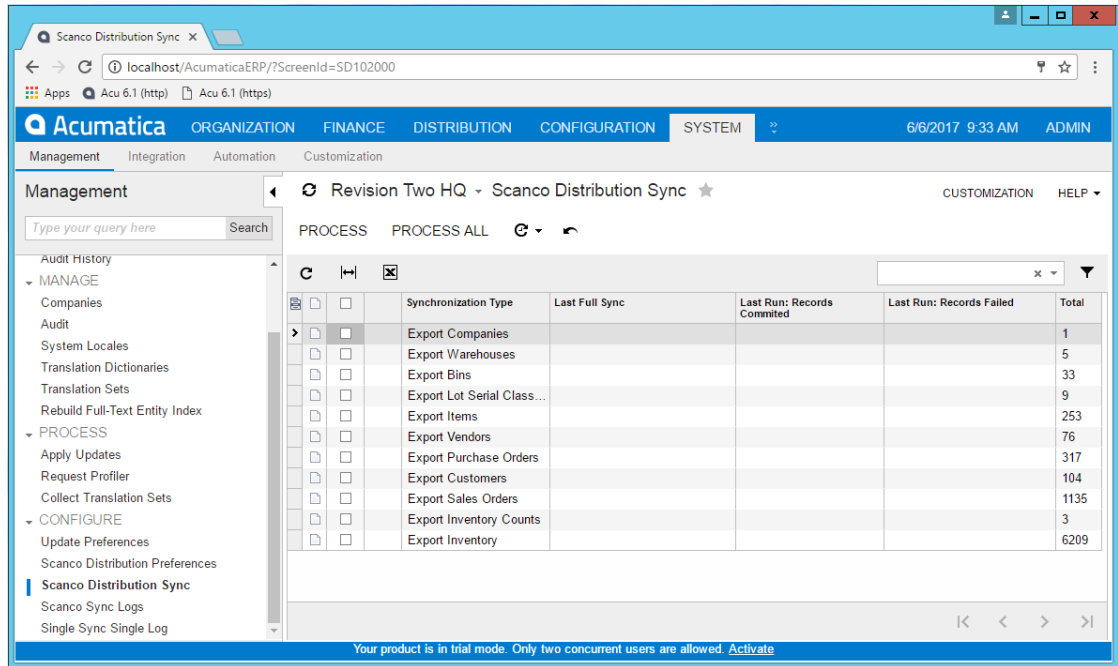
After Scanco plugin(s) are configured, you are ready to synchronize them between Scanco and Acumatica.

IMPORTANT: You must synchronize the Warehouse plugin before the Manufacturing plugin.

Sync the Warehouse Plugin

To sync the Warehouse plugin

1. Log into **Acumatica**.
2. Navigate to Distribution Sync by typing “distribution sync” in the **Search** field. Then, click the **Scanco Distribution Sync** link. (Alternatively, browse to the System tab, click the Management link, and then select Scanco Distribution Sync.)



3. Select the plugins to synchronize. Click **Process**.

Or, select all plugins. Click **Process All**.

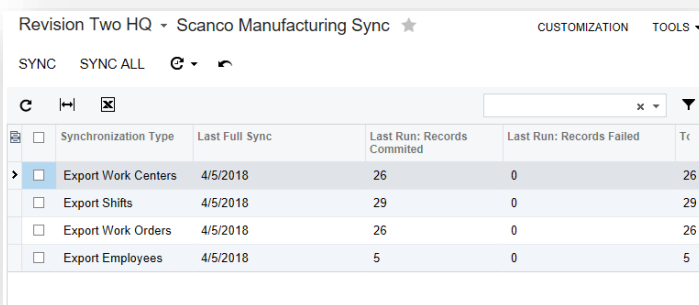
Once synchronized, the window will show the date of your last full sync, records committed, and any records that have failed.

Sync the Manufacturing Plugin

IMPORTANT: Each time you need to synchronize the Manufacturing plugin, you must synchronize your Warehouse plugins first. This is required for the system to operate correctly.

To sync the Manufacturing plugin

1. Log into **Acumatica**.
2. Navigate to Manufacturing Sync by typing “distribution sync” in the **Search** field. Then, click the **Scanco Manufacturing Sync** link. (Alternatively, browse to the System tab, click the Management link, and then select Scanco Manufacturing Sync.)



<input type="checkbox"/>	Synchronization Type	Last Full Sync	Last Run: Records Committed	Last Run: Records Failed	Total
<input checked="" type="checkbox"/>	Export Work Centers	4/5/2018	26	0	26
<input type="checkbox"/>	Export Shifts	4/5/2018	29	0	29
<input type="checkbox"/>	Export Work Orders	4/5/2018	26	0	26
<input type="checkbox"/>	Export Employees	4/5/2018	5	0	5

3. Select the plugins to synchronize. Click **Process**.

Or, select all plugins. Click **Process All**.

The date of the Last Full Sync will update when records are committed.