

Infor Invoice Automation Documentation

Version 1.0.0

NOTES

Welcome to Infor INVOICE Automation's readme pdf for version **1.0.0!**

This documentation is intended to function as a guide for what the user needs to know. For this manual to serve its purpose to you please make sure that its version listed under the Need Help button corresponds with the downloaded version of your app, this app may be in continued development so it along with its applications will change overtime and become outdated. If you can not find what you need, such as more updated version of this documentation, please reference the following website: {website_url} for further information

website to be made in future

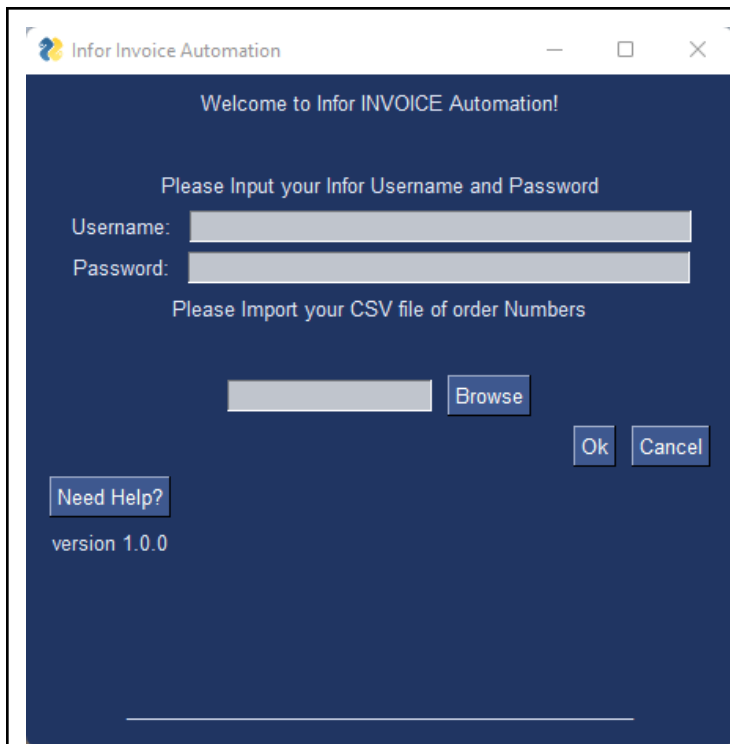
Introduction

The *Infor INVOICE Automation* app is a python app that serves as a tool to convert csv files which list order numbers into infor invoices. The app works by taking in a user's unique infor username and password as well as a csv file, containing real, accurate, and correctly formatted order numbers and then navigating to infor, inputting recorded orders, and finally converting those orders into invoices. While the app has the ability to catch non existent orders, poorly formatted orders, and other csv issues it is not yet tested enough. For best results use a csv file you are confident is correct. The app also reports back 3 lines of messages, Line 1: The number of orders the app recorder being in the csv along with the number of successful invoices the app made, Line 2: A list of teh order numbers of any orders the app failed to input and make invoices into, and Line 3: additional errors (more on these later). These messages should help a user identify if a run of this app may have ran into issues and what issues were present.

Download

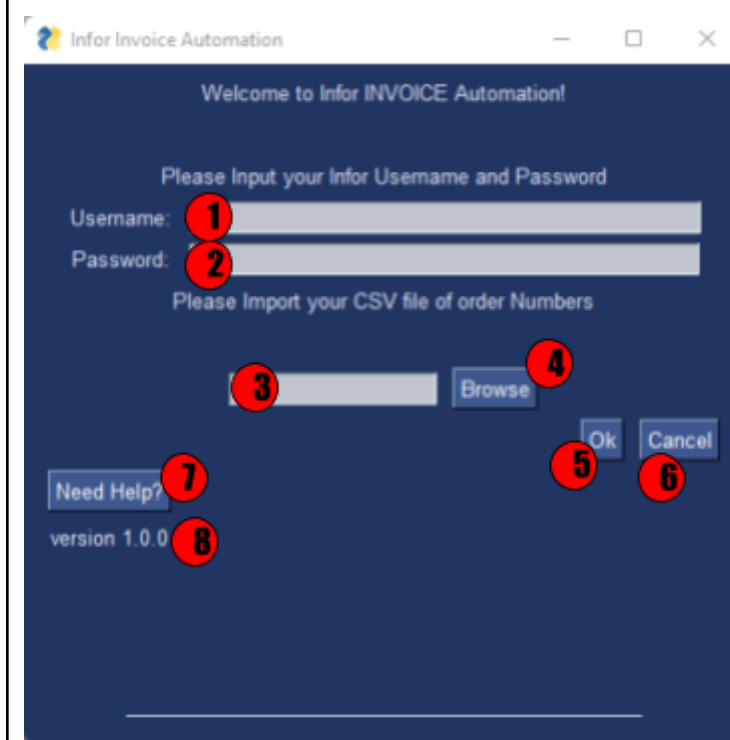
To be updated

Basics



(Figure 1)

Upon opening your *Infor Invoice Automation* app, you should see a pop up that looks like the image below (figure 1). The default size of this page should be plenty of space to see any relevant functions, buttons, and messages.



(Figure 2)

The functions and purposes of the following items of the pop up are:

Inputs:

- 1: An input in which the user should click and type in their unique infor username
- 2: An input in which the user should click and type their unique infor password
- 3: An input in which the user could click and type the File path to their csv however using the browsing button is recommended. Instead use this to view your path

Buttons

- 4: This is the Browsing button click to search in your directories for your csv file
- 5: Click Ok after typing your username, password, and choosing your csv to continue with the automated process of making your csv into infor invoices
- 6: Click cancel to close the page

	outside of when it is in the automation process 7: Click this button to open a documentation page like this one in case you are confused 8: View your application version

Secrets File

The secrets file is a necessary component of your app, however as it contains information that is sensitive or settings that are potentially unique for each individual user, it is oftentimes not included. To view if you have a secrets file, navigate to your file explorer and find your *SHOPIFY_INFORORDRS* (unzipped folder), open it, and instead of opening the app.exe, look for an application *secrets.py*. To open it click it.

If you do not have one you can make one (or contact the distributor). To make one, copy and paste inside the *SHOPIFY_INFORORDRS* folder, the sampleSecrets.py file and name it secret.py. Next open the secret.py file and edit it. You should see code/ text like this:

```

""" Guide to how to set up your secrets.py
"""

#information that is same for all company users NOT individual passwrod and username
password_valtra = 'Company password'
username_valtra = 'Company username'
company = 'Company name or other identifier'

# used for helping calibrate sleep time
# as sleep times tend to have different requirements
# on different computers, replace with int
TimeFactor = 1

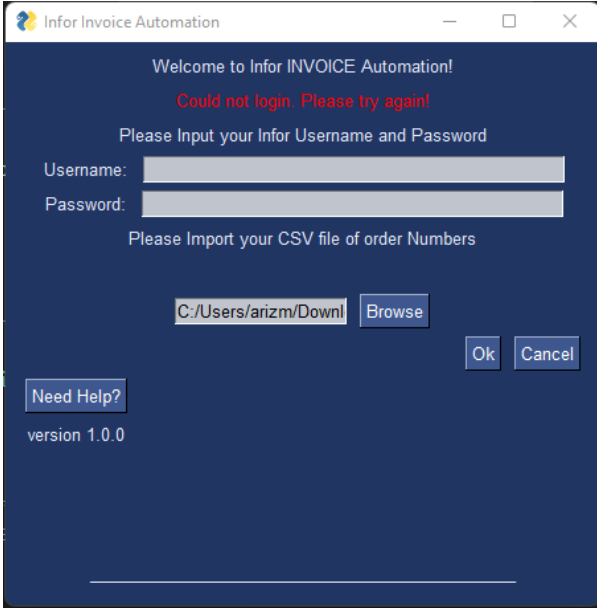
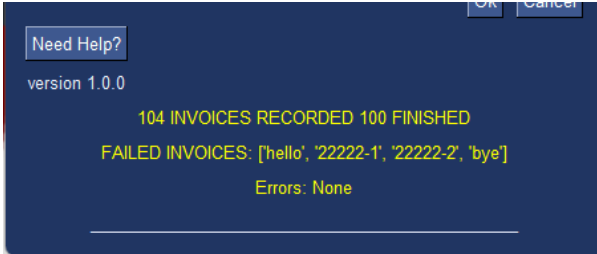
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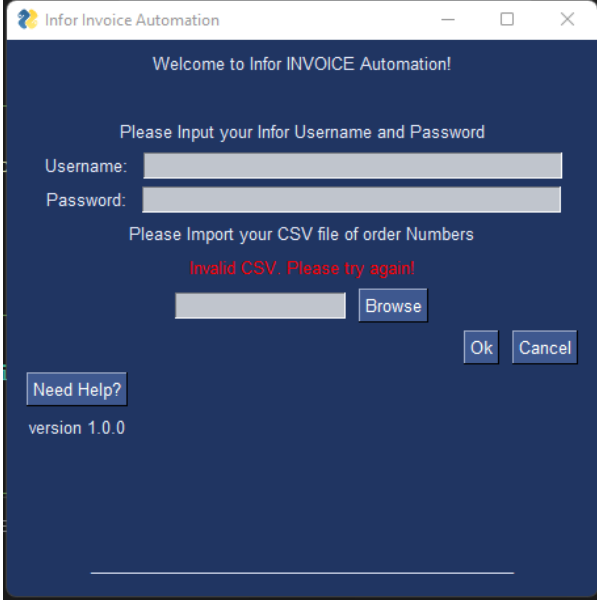
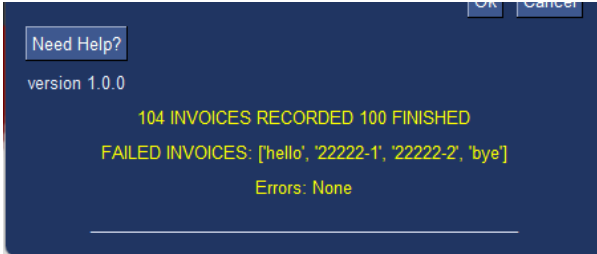
Now edit each variable's (in light blue) right side of the equal sign (In red). For password_valtra type in your company's infor password inside of apostrophes ('), for username_valtra type in your company's infor username inside of apostrophes ('), for company type in your company's infor company identifier inside of apostrophes, and for TimeFactor type 1, unless you wish for the automation to be quicker or slower.

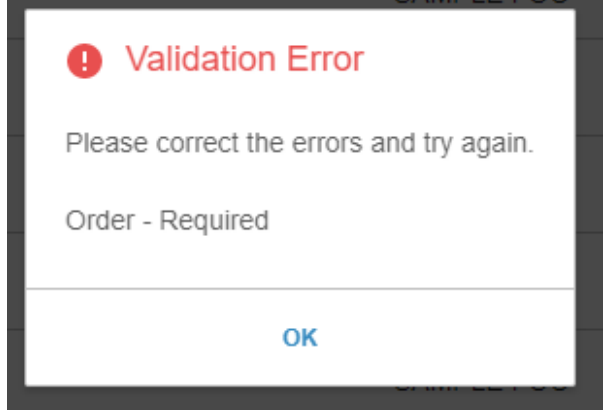
If you would like to type in a number greater than 0. The smaller the number the faster the automation will go, the greater the slower. However please note that time factor will change the wait times in between automation processes to take into account infor buffer periods, and can cause issues and application glitches and failure if made too small.

Errors

The following chart lists or describes errors that can be shown when using the app. Make sure to check for deviations between messages and errors, contradictions between them may signal an error not captured by the application or a glitch

<p>Could not login. Please try again!</p> 	<p>The following error occurs when either no username or password was inputted or no valid username or password was inputted. This can also occur if there is poor internet connection or infor access. If there is an issue with the password or username you will likely see this error appear in your automated browser:</p> 
<p>Failed_Invoices</p> 	<p>After finishing a run of the application this text will appear giving a summary of the automation process. On line 1, the app will report how many orders it recorded being on the csv and how many were successfully made onto invoices on infor. Line 2 reports a list of the order numbers of all the unsuccessful invoices. The number of order numbers should equal the invoices recorded minus the invoices finished. Line 3 reports additional errors.</p>
<p>Invalid CSV. Please try again!</p>	<p>This message appears when either no csv has been selected and ok has been pushed, making the app unable to begin the automation process or if an invalid file or csv file has been chosen. Please insert a functional csv file.</p>

	
<p>more orders actually inputted than recorded [Urgent Code 2] *Image to be updated</p>	<p>This means that the app recorded less orders turned into invoices than infor did, this probably means that the app messed up its counting. This error is usually not too alarming(line 3)</p>
<p>more orders recorded than actually inputted [Urgent code 1] *Image to be updated</p>	<p>This means that the app recorded that more orders were inputted and made into successful invoices that what infor reported (line 3). This probably means an order from the csv was not inputted and the application does not know and did not report that</p>
<p>None</p> 	<p>No ADDITIONAL errors were found by the application. (line 3)</p>
<p>Time Out errors: Description: When the application times out, or white screens this may be an indication the app is timing out. It is usually caused by poor connection or the application moving faster than the buffer time in between processes. This time changes among computers and</p>	<p>If your app white screens while trying to login this may indicate a time out, however closing the browser and the app can usually solve this, but it could signal a larger issue if it happens frequently</p> <p>If your browser shows a lot of the pop ups</p>

networks/ internet connections	<p>below it could mean the buffer time is indeed too large and the app is moving too quickly. To resolve this change the TimeFactor (see secrets section)</p>  A screenshot of a 'Validation Error' dialog box. It has a red exclamation mark icon followed by the text 'Validation Error' in red. Below this, it says 'Please correct the errors and try again.' in grey. Then, it lists 'Order - Required' in grey. At the bottom right, there is a blue 'OK' button. <p>Validation Error</p> <p>Please correct the errors and try again.</p> <p>Order - Required</p> <p>OK</p>
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