**Dental Warehouse Development**

**System Integration**

# Bidvest

## Analysis

Bidvest data handles all invoicing, stock transfer, credit notes and statement. Stored in the cloud, storage facility for documentation. The debtor invoices and statements are stored in the cloud, which the customer can access via a website. Doesn’t store balances.

The invoices and statements have advertisements on the bottom of the documentation. These are specified by DW.

Bidvest gets a spool file at the moment. They require a different type of file for future integration, Pipe Delimited, XML file required

Invoice/Credit notes

Invoice/credit notes details including customer master details are on the file. Any invoice at a status of released and set to print to file goes to an FTP site.

Bidvest fetches the file and processes the file.

A confirmation receipt is received via email that the invoice has been processed.

A copy of the file is saved on AS400 for about a month.

Invoice then comes back to DW Printers. This then prints to a designated printer at the warehouse

A second Printers setup in the WH as a backup

An invoice can be sent twice and shows twice on Bidvest’s system.

Reprints: Will have to login to the website to print a copy of the invoice.

If file isn’t received, then the saved version of the file to Bidvest via FTP

Stock Transfer

Between the different depots or reps or consignment or holding

Internal document

Processed on AS400

Also gets checked against basket and stock transfer and picking instruction before collection

Stock transfer is then posted

When posting the transaction, it sends a trigger to send file to Bidvest

Get email confirmation to show that the stock transfer document was processed. Similar layout to invoice without ad

This is then saved on the cloud. Uses a stock transfer document number to find the document

Statements

DW generate statements on AS400. Put in criteria to generate statements.

Able to print balance brought forward

Open items

Statements are selected to be emailed or post

The file with all the statements information is sent to Bidvest. This is then put into the different templates.

The file is generated when the statement run happens. No errors or changes are made after the statement run.

Usually fixed in the new month.

A list of customers with email addresses is currently sent separately. The same information is already included in the invoices and statements.

Copy of the statement file is also kept on the AS400 as a backup for approx. a week.

Mid-month statements, adhoc is run on AS400 and then sent to Bidvest

The statement is then saved on Bidvest

Can be accessed via the cloud, and website

Test documents:

Bidvest sends statements about samples to proof before final release of the documents to customers

## Sample Documents

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# The raw data as we receive from Dental Warehouse.  As stated, it would be preferable not to receive PCL files going forward. Preferable to be XML file format, if not possible, then CSV.

## Error handling:

If file not received the saved file is sent to Bidvest

Issues:

Delay in Bidvest server, from DW to Bidvest to Printer. Longest is about an hour. SLA is 48hours

Alternative is to get software on site, Bidvest can configure it and it will be instant. Then at end of the day dependant on frequency, a file to be sent to Bidvest to update the cloud.

# OrderWise (OrderLogistics)

## Analysis

Customers place an order on OrderWise (OrderLogistics)

Procurement platform for pharmaceutical and medical institutions

On website

* DW supplies data in a template form- need template with the fields that are supplied, a price file is sent to OrderLogistics/OrderWise
* OrderWise uploads the file into website
* A separate price list is sent per customer, only items for that customer. Customers may have their own price list
* Medicross
* Intercare
* Netcare hospital
* Customer places order on OrderLogistics software
* OrderLogistics place the order file on the server – FTP site
* AS400 pulls the order
* Creates a sales order on the system using the details and price from the orderwise order
* Customer order number must show on the sales order
* Probably show that the order was created on Orderwise-Source or user possibly
* A result of the order is sent back to supplier to show which items are available. (But does not show discontinued) turnaround is in 3 minutes Check order to stock. Order confirmation. This must match to the invoice
* Customer calls in to cancel the Order or for amendments. Then the order is manually updated. Extra units require a new order

## Sample Documents

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## 

## Files used for Dental Warehouse;

## Order

## Result

## Price

## Price files are sent to them from Dental Warehouse.

## This is the order file sent from Dental Warehouse

## The Result file they receive from Dental Warehouse

## Errors handling:

* Usually a discontinued item
  + The order is created and puts the order in suspension
  + An error code is sent to the customer via FTP
  + The item is deleted off the order and the order is off suspension and then follows the order process
  + Not sure if the customer gets a confirmation of the order change

# Website – Streetbyte

## Analysis

* Send a customer master file (Need template)
* Price Policy (Template)
* Need list of information sent to website
* Debtor ageing and balances
* Item information and images
* Daily orders -so that the customer can view their old orders
* Sent daily at night with that days information
* Contact – Craig - Kusasa
* Website gets the information and uploads the data and images
* Customer registers the account. An order is placed
* No account is open for credit
* An email is then sent to the sales department regarding the order. An order number is generated. This becomes the customer order number on our Sales order.
* They are able to order anything
* Sales notify Credit department to send through account application form
* Physical form
* A verification of the account needs to happen
* Credit process follows
* If existing customer, the customer price group affects the list price shown on the system against the items
* The sales order information is then sent to the website only when invoicing has been done. This forms part of the order history – order number, invoice number, need the fields that’s sent. Daily file
  + Need to know what information is sent
  + No status updates
  + Changes order status on website from processed (Request) to Complete (Order generated) *need to confirm if this is the case. Could be manually updated*
  + *Need to know what info is sent back to customer?*
* In use for approx. 6 months
* The price on internet is supposed to be charged on invoice

Issues

Customer account numbers are not linked to online accounts

## Sample Documents

There's no reason to continue using the same process as was created to use AS400. It was done that was because of AS400, not because of the website's requirements. There are more appropriate ways to move data to and from the website. I am not opposed to reworking the integration based on the new platform. This would be a great opportunity to review the integration and improve the online platform.

The website is based on the WooCommerce platform, which means it has a REST API available which allows for automated two-way communication with a platform such as Microsoft Dynamics. You can find the documentation here:

[http://woocommerce.github.io/woocommerce-rest-api-docs/#introduction](https://protect-za.mimecast.com/s/wr_QCJZ13YHpDQqXfVV2YW?domain=woocommerce.github.io)

AS400 generates and exports .txt files containing the following information daily:

* A product list
* A product specials list
* A customer list
* An Order list

The information is uploaded to the website on a schedule to keep the products and customers up to date and allow customers to view and re-order previous orders.

We do not push any information to AS400 at this time.

The text files are essentially CSV files using the pipe | as a separator.

The files contain personally identifying data for Dental Warehouse customers and as such, I do not have permission from those customers to share their data.

Dental Warehouse may have permission to share the data with 3rd parties like ourselves if needed. I have made the files available to Dental Warehouse.

Currently The Dental Warehouse send us the following rawdata files nightly via SFTP.

* customer-groups.txt
* customer-master.txt
* dentsply-xref.txt
* geo-areas.txt
* order-taken-by.txt
* product-categories.txt
* product-master.txt
* product-sub-categories.txt
* rep-names.txt
* sales-invoices.txt
* stock-master.txt
* supplier-master.txt

            

# Phocas – BI tool

Dependant on NAV BI tool

Speak to Ashima as to what Karma has, has to be the same with DW

Will need to consider history as NAV will have open balances

Probably integrate for a period before Power BI is used.

# Maximiser – CRM

Controls the sales rep appointments and integrates to outlook

Integrates to outlook

Customer master details goes to Maximiser. One upload 2 years ago

To be done as a second phase.

# Courier integration – waybill only for Globeflight

* They get the service type
* Customers are defaulted to a service type dependant on where customer is situated
* On the order the service type is indicated
* Possibly look at weight and dimensions of parcel to indicate which is the best method of sending the parcel…
* Require a listing of details required by Globe flight – need contact from Eric.
* The details are stored in waybill barcode
* Globeflight scans into the system…its an online computer stored in warehouse. This is used to track the parcel.
* Load sheet is then sent to WH.
* SLA meeting once a month, late deliveries. Managed manually. No responses/replies from Globeflight…facility for POD data isn’t used currently
* Currently have onsite staff at WH from GF

Waybills only print for Globeflight. Manual waybills used for other courier companies