

Sage CRM Connector for Sage X3 version 4.2

Troubleshooting Guide

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Software supported

Sage CRM Connector for Sage X3 version 4.2 is compatible with:

- **Sage X3** Product Update 9, Product Update 8, version 7, and version 6.5
- **Sage CRM** versions 2017 R3, 2017 R2, 2017 R1, and 7.3 SP3

General troubleshooting

- [Troubleshooting questions](#)
- [Testing web services connections](#)
- [Working with a non-standard web service name](#)
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Troubleshooting questions

When an issue is reported, you should check the following.

- The Connector version number. You can check the Gateway DLL version number in `\CustomPages\Enbu\Framework\Server\EnbuGateway\bin\ EnbuGateway.dll` on the CRM server where the Connector is installed. For supported versions, see Version matrix.
- The Sage X3 version number. For supported versions, see Version matrix.
- Sage X3 patches that have been applied.
- The Sage CRM version number. For supported versions, see Version matrix.
- If this a production installation or a test installation.
- Sage CRM can access Sage X3 web services. See *Specifying web services access credentials* in the Connector *Installation Guide*.
- **web.config** settings are configured correctly. See *Specifying web services access credentials* in the Connector *Installation Guide*.
- The required web services are defined in Sage X3 using the recommended naming conventions (WSCUSTOMER, WSITS, WSFCY, WSORDER, WSQUOTE, WSREP). See *Defining web services* in the Connector *Installation Guide* and see [Working with a non-standard web service name](#).
- Web services are returning data using the Adonix web service tester (Sage X3 PU8 and earlier) or the Syracuse tester (Sage X3 PU9).

- Sage CRM web service connections have been tested using the Test Connection function. See *Testing the web services connection* in the *Connector Installation Guide*.
- **AccountMigration.asp** settings are correct. See Account Migration settings.
- If the issue affects any specific screens. For example, Connector screens in Sage CRM.
- Any previous investigations that may provide further information on the issue.
- The exact nature of the issue and whether it affects a specific area such as account migration or Post to X3.
- Sage X3 log files or gateway log files (set to level 3 logging).

Tip: For a complete list of integration videos and troubleshooting articles, see the Connector landing page on the [Sage CRM Partner Community](#).

Testing web services connections

- Gateway method test parameters are used when creating new records in Sage X3 from Sage CRM. The default Gateway method test parameter values for the WSCustomer, WSOOrder, and WSQuote web services must be changed after installing the Connector because these values are dependent on Sage X3 installation data.
- The Gateway method test parameter for WSCustomer must be a Sage X3 customer with at least one address and at least one contact. Sage CRM uses this customer as a template to create new customers in Sage X3 that are posted from Sage CRM. If the Sage X3 customer doesn't have one address and one contact, an error occurs when the user tries to post a record to Sage X3.
- The Gateway method test parameter for WSOOrder and WSQuote must be a valid Sage X3 quote or order. You should be able to manually create a quote or order in Sage X3 to ensure there are no issues in Sage X3 that would prevent the web service creating a quote or order when called from Sage CRM. If you can't create a quote or order, contact Sage X3 support.
- If you test the web services connection without specifying a Gateway method test parameter, the web service call runs in query mode in Sage X3 and returns the left list from the called object. This is useful when testing the WSCustomer web service as the left list returns selection list data only. This is less expensive than returning the full list of data for all Sage X3 records.
- If you test the web services connection using a Gateway method test parameter, the web service call runs in read mode and returns all data for the Sage X3 record specified by the gateway test parameter.

Working with a non-standard web service name

If the web service name doesn't follow the recommended naming convention, you must change the Sage CRM and Connector configurations to match the web service name.

For example, if the Customer web service in Sage X3 is WSCust instead of WSCustomer, do the following:

- Rename the web service to X3WSCUST in Sage CRM.
- Change the `X3CustomerObject` variable in **AccountMigration.asp** to `X3CustomerObject = "X3WSCUST"`.
- Rename the web service to X3WSCUST in **X3Data.asp**.

Confirming timestamp field has been added

Issue: A timestamp error is logged.

In Sage X3 version 6.5, the timestamp field is correctly exposed through the web service.

In Sage X3 version 7 and later, you must add a timestamp field to the BPC customer table. For information about how to do this, see *Adding a timestamp field* in the *Connector Installation Guide*.

1. Create a Sage X3 record with no contact and synchronize it. The logs should show a validation error on the Contact field.
2. Modify the same Sage X3 record and synchronize it again. The logs should show an error on the timestamp field.
3. Open **AccountMigration.asp** and ensure it's pointing to the new timestamp field. In Sage X3 version 6.5 and earlier, the timestamp field is called **bpc4_1_update**. In Sage X3 version 7 and later, the timestamp field is called **UPDDATTIM** if you added it using the method described in the *Connector version 2 Installation Guide*. In Sage X3 version 7, if you added the timestamp field using the expression as described in the *Connector version 4.2 Installation Guide*, you must look at the web service to discover the new timestamp column name (for example, BPC0-1-c11). Save the file and synchronize again. The record should synchronize to Sage CRM without errors.
4. To confirm that the timestamp field has been correctly added to the Customer web service, test the WSCustomer web service using a blank value for the Gateway method test parameter.
5. If the timestamp field has been correctly added, the left list is returned and the timestamp field is included in the results. The timestamp is also available during account migration. However, the

timestamp field in Sage X3 is updated only after a customer record has been saved. So if a record has not been modified, the timestamp field isn't included in an account migration.

Disabling phone number validation

Phone mapping between Sage CRM and Sage X3 is disabled by default. To enable phone mapping, you must change the **web.config** and system behavior as described in *Phone numbers* in the Connector *Installation Guide*. Additionally, you can turn off phone number validation in Sage X3 as described below.

Note: Sage X3 recommend that you don't tell customers that it's possible to disable phone number validation.

1. In Sage X3, click **Setup | General Parameters | Parameter values | SUP Supervisor | Folder | SEED**.
2. Click **INT**.
3. Click **Detail**.
4. Change the value of **CTLTEL** to **None**.

Account migration settings

Setting	Description
listMode	False is a full two-way synchronization with full account calls to Sage X3. True is a default, full account call based synchronization.
migrateMode	True ignores two-way synchronization and time check, and forces a full one-way synchronization from Sage X3 to Sage CRM. You can specify this setting in the UI in the Connector version 4.2.
listTimestampOnly	True assumes Sage X3 reports null timestamps if no timestamps are included.
ImportActiveOnly	True imports active accounts only.
if (false) rangeArray = ["121DMC"]; false	True processes the customer record specified in the brackets. Use this setting to debug an issue with a customer record or prove that modifications made to the field mapping file are correct before applying the synchronization to every record in Sage X3 and Sage CRM.

Setting	Description
numRecordsPerLoop	The number of records synchronized in one loop containing one account listing call. For example, if this value is 10, 10 accounts are processed at once and displayed in the UI. If this value is too high, a delay occurs before any accounts are displayed in the UI.
sX3SyncDateField	Change this value to the correct timestamp field that's exposed by the Sage X3 web services.
X3CustomerObject	If the customer has a different name for the BPC object web service, enter it here.
showErrorsOnScreen	False removes some errors displayed during the synchronization to make the process more user friendly.
fieldByFieldLogging	True logs extra detail about each field during a synchronization.
Logging	True enables logging.

Specific issues

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- [Timestamp and daylight savings time](#)
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WSOrder web service

Issue: When you publish Connector web services using Sage X3 PU9, the following error occurs.

SOH WEB: Too many published fields.

1. In Sage X3, click **Development | Data and parameters | Development setup | Activity codes**.
2. Click the activity code that's referenced in the error message.
3. Change the value of **Screen size** from *1002* to *300*.
4. Click **Parameters | Sales | Entry Transactions | Orders**.
5. From the list on the left side of the screen, click a sales order transaction and then click **Validation** on the right of the screen. Validate each sales order transaction in the list.
6. Click **Development | Script dictionary | Scripts | Web Services**.

7. Filter the list of publications to find the WSOOrder publication.
8. Click **Publication** on the right side of the screen.

Timestamp and daylight savings time

Issue: The timestamp used when synchronizing data from Sage X3 to Sage CRM does not consider daylight savings time.

1. On the server where Sage X3 is installed, unselect **Automatically adjust clock for Daylight Savings Time**.
2. On the server where Sage CRM is installed, unselect **Automatically adjust clock for Daylight Savings Time**.

Update times in Sage X3

Issue: In Sage X3 version 6.5, update times are stored as local server time on the database. This was changed in Sage X3 version 7 onwards to store the update times as UTC time.

Sage CRM stores its update time in local server time. The Sage CRM Connector version 2.0 automatically converts Sage CRM update time from local server time to UTC time so a comparison can be made with Sage X3 when performing an account migration.

You can turn off this automatic conversion when running against Sage X3 version 6.5. To do this, add the following line to **AccountMigration.asp** and **AccountMigrationService.asp**.

```
AutoUTCAdjustment = false;
```

Sale site lookup field

Issue: A user clicks the magnifying glass beside a sale site lookup field but no records are displayed.

Use Test Service to check if the X3WSFCY web service is returning data. See Testing the web services connection. If it is not returning data, check the following.

- Has the web service been created in Sage X3 and does it return data?
- Has the schema been created correctly in Sage CRM?

Quotes and orders in Sage CRM

Issue: When a user tries to create a quote or order in Sage CRM, an error occurs.

If this is not a tax determination rule error, try to manually create a quote or order in Sage X3. If you are unable to do so, contact Sage X3 support.

If this is a tax determination rule, do the following:

1. In Sage X3, open the quote or order and note the tax rule that's displayed in the header. The rule comes from the **Customer** or the **Customer ship to** field.
2. Note the tax level that's displayed in the quote or order lines.
3. Click **Common data | Common tables | Tax determination** and click **New**.
4. Enter the tax rule and tax level in **Code** and in **Short description**. For example, *USA_NOR*.
5. Select **Active**.
6. Enter a description. For example, *usa_nor*.
7. Set **Tax type** to **VAT** and set **BP tax rule** to the tax rule. For example, *USA*.
8. Set **Product tax level** to the tax level. For example, *NOR*.
9. Click **TAX** and enter the tax level. This is the tax rate.
 - If the tax rate is on file and **Start date** is blank, enter a date and click **Save**.
 - If the tax rate is not on file, click **Action** in the **TAX** field and select **Taxes**. Click **New**. Complete the fields as in the steps above, leaving **Rate** blank, and then click **Save/Create**.
10. Try to create the quote or order again. If it still doesn't work, contact Sage X3 support.

Display X3 Accounts button

Issue: When you click **Display X3 Accounts** during account migration using the Connector, no Sage X3 customer accounts are displayed.

1. Navigate to **C:\Program Files (x86)\Sage\CRM\CRM\WWWRoot\CustomPages\Enbu\Framework\Server\EnbuGateway\Schema** and delete **WSCUSTOMER.xml**.
2. In Sage CRM, click **<My Profile> | Administration | Sage CRM Connector | WS Connections**.
3. Click **WSCustomer** and click **Change**.
4. In **Gateway Method Test Parameters**, enter a valid X3 customer number for **BPCNUM**.
5. Click **Save**.
6. Click **Test Service**.
7. When the valid customer record is returned, click **Create Table**, and then click **Confirm Create Table**.
8. Attempt the account migration again.

Post to X3

Issue: When a user creates a new company record in Sage CRM and clicks **Post to X3**, the record is not posted and an error is displayed: The X3 test record account doesn't have contact or address.

Ensure the Gateway method test parameter that's specified for the WSCustomer web service in Sage CRM is a Sage X3 customer with at least one contact and at least one address, and click **Test Service**.

TSC code

Issue: When you attempt to update the TSC code field on the Sage X3 Customer Info screen in Sage CRM, a synchronization error occurs. This is because validation is required to update this field in Sage X3. The solution is to make the TSC code field on the X3 Customer Info screen in Sage CRM read-only.

1. Log in to Sage CRM.
2. Navigate to **<My Profile> | Administration | Customisation | Secondary Entities | WsCustomer**.
3. Click the **Screens** tab on the **WsCustomer** screen.
4. Click the **X3CustomerScreen** link.
5. Click **WsCustomer: TSC Code (bpc2_6_tsccod)** in the **Desktop HTML Screen Contents** section.
6. Enter *ReadOnly = true;* in **CreateScript**.
7. Click **Update** and then click **Save**.

Sage X3 version number

Issue: On a Spanish, German, French, or Dutch environment where commas (,) are used instead of periods (.), the Gateway incorrectly reads the Sage X3 version number as 70 instead of 7. As a result, the Gateway assumes that the version is Sage X3 PU9 or later and tries to connect with the authentication requirements of X3 PU9 or later.

In **web.config**, change the value of X3 Version from 7.0 to 7.

Windows Task Scheduler

Issue: It's not possible to call **callservice.js** from the Windows Task Scheduler.

1. Open the task in the task scheduler.
2. Click **Properties**.
3. Click the **Actions** tab and click **Edit**.
4. Add the following location to the **Program/Script** field:
`C:\Windows\System32\wscript.exe`

5. Add the following location to the **Add Arguments(Optional)** field. Use quotes around the path.
"%ProgramFiles
(x86)%\Sage\CRM\CRM\WWWRoot\CustomPages\Enbu\Framework\X3\CallService.js"
6. Run the task.

Sage X3 account synchronization

Issue: An update to a Sage X3 account is not synchronized to Sage CRM. **This issue applies to Connector version 2.2.1 and earlier.**

The date recorded on a Sage X3 customer record is the date that the Customer screen was first opened rather than the date on which the record was saved. To mitigate this, the user must double save the record each time a change is made.

Alternatively, add a timestamp field to Sage X3 for the BPC object on the Customer screen so it's exposed on the WSCustomer web service. See *Adding a timestamp field* in the *Installation Guide*. This field ensures the correct date and time are saved when the BPC record is updated using the Customer screen and the record is included in the next synchronization. However, if a user updates the BPC customer record using the BP screen, the timestamp field is not updated and the record is not included in the next synchronization.

If the record is still not synchronizing, do the following.

1. Increase the logging level in **web.config**.
2. Ensure the Gateway is pointing to the correct Sage X3 web services URL in **web.config**.
3. Run the Sage X3 web services URL in Internet Explorer. It should return the following:
Hi there, this is an AXIS service! The web services are working fine.
4. In Sage CRM, check BPCNUM in the web services definition to ensure the customer account number is correct. Check the data that's returned.
5. Copy and paste the customer account number into **AccountMigration.asp** and run a synchronization.
6. Check if the record is updated in Sage CRM.

Scheduled account migration

Issue: A scheduled account migration causes **callservice.js** to return a Self Service not licensed error.

A Self Service license is a prerequisite for scheduled account migration. A Self Service license is not required for manual account migration.