

MAX Custom Processor

Flexible Custom Processor for the Exact Synergy Integration

With the Synergy Integrator for MAX you can upload data (Customer, Vendor, Item, Contract) from MAX to Synergy and download data (Customer, Vendor) from Synergy to MAX.

The Synergy Integrator for MAX has some options to edit the mappings of fields, the fields which can be mapped are limited to the predefined fields in the Synergy Integrator.

The Custom Processor feature of the Synergy Integrator for MAX allows the XML that is to be send or downloaded to be modified before it is actually uploaded. This can be useful when uploading requires logic that is beyond the flexibility of the integrator. This capability requires familiarity with Visual Basic, COM objects and XML programming using the MSXML DOM.

The MAX Custom Processor of Velthoven Consulting offers a flexible solution for mapping fields between MAX and Synergy. The MAX Custom Processor can be used as Custom Processor in the standard Synergy Integrator for MAX and does not require knowledge of Visual Basic, COM objects or XML programming using the MSXML DOM.

The mapping of the fields can be specified in a XML configuration file. The mapping can be done to the standard Customer, Vendor or Part tables and also to the additional User Designed Fields tables for the Customer, Vendor or Part (Customer_Master_Ext, Vendor_Master_Ext, Part_Master_Ext).

The MAX Custom Processor can update the XML that is to be send or downloaded by the Synergy Integrator or can also update fields directly in a table. On data download fields can also be updated directly in a table, only fields of existing Ccustomers/Vendors can be updated, an alternative is running the download of Customers/Vendors from Synergy to MAX twice, the first time the Customer/Vendor is created in MAX by the standard functionality of the integrator, the second time the fields are updated by the MAX Custom Processor. The User Designed Fields tables fields of existing Customers/Vendors are updated and Customers/Vendors are also added if they do not yet exist in the User Designed Fields tables.

The following fields from the XML Customer Download of Synergy can be mapped to MAX fields in the Customer_Master or Customer_Master_Ext table:

- Free Text 1 - 30
Example: `<Mapping sourceField="FreeText6" targetField="Customer_Master.COMNT1_23"/>`
- Free Number 1 - 5
Example: `<Mapping sourceField="FreeNumber1" targetField="Customer_Master_Ext.NUMBER"/>`
- Free Date 1 - 5
Example: `<Mapping sourceField="FreeDate1" targetField="Customer_Master_Ext.DATE"/>`
- Free Yes/No 1 - 5
Example: `<Mapping sourceField="FreeYesNo1" targetField="Customer_Master_Ext.YESNO"/>`
- Any other field
Example: `<Mapping sourceField="HomePage" targetField="Customer_Master_Ext.HOMEPAGE"/>`
- Attribute of a field
Example: `<Mapping sourceField="AccountCategory" sourceAttribute="code" targetField="Customer_Master_Ext.TEST"/>`

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The Vat Code of the customer is not included in the XML Customer Download of Synergy. The MAX Custom Processor can look up the Vat Code in the Synergy Account table (cicmpy) and map the Vat Code to a field in the Customer_Master or Customer_Master_Ext table, example
<Mapping sourceField="VatCode" targetField="Customer_Master.TXCDE1_23" />

The MAX Custom Processor also has functionality to translate values of a field in the XML Customer Download of Synergy by pre defined values, for example:

```
<Mapping sourceField="Manager" replaceAttribute="number" >
  <Replace oldValue="10" newValue="001"/>
  <Replace oldValue="23" newValue="001"/>
  <Replace oldValue="24" newValue="001"/>
  <Replace oldValue="25" newValue="002"/>
  <Replace oldValue="50" newValue="003"/>
  <Replace oldValue="67" newValue="003"/>
</Mapping>
```

In MAX the State and Country are a text field, Synergy uses codes and has additional tables for State and Country. The MAX Custom Processor can translate the Synergy Code to the State/Country name on downloading Customers from Synergy to MAX or translate the State/Country name to the Synergy Code on uploading Vendors. The MAX Custom Processor looks up the State/Country code or name in the Synergy tables for translating.

In the XML configuration of the MAX Custom Processor the following additional settings must be specified:

- MAX Server Company

The MAX Company must be specified in the XML configuration file because the selected MAX Company in the integrator is not known within the Custom Processor. The specified MAX Company will be used for updating the Customer_Master or Customer_Master_Ext table.

- MAX Server User Name

The User Name which should be used for the ModifiedBy field in the Customer_Master on updating fields in the Customer_Master.

- Synergy Server, Database, User Name, Password

The VatCode is look in the Account table (cicmpy) of Synergy, because of this the Synergy Server and Database must be specified.

The User Name and Password for access to the SQL Server with the Synergy database has to be specified (SQL Authentication). When no User Name or Password is specified Windows Authentication is used to access the SQL Server, the current user must have access to the Synergy Database in this case.

- Log File Path

Error messages of the MAX Customer Processor are stored in the specified log file.

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