



## Setting Up the Visual AccountMate Interface

Version 7.1

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# STARSHIP FOR VISUAL ACCOUNTMATE

## OVERVIEW

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### Overview

StarShip's real-time Visual AccountMate interface lets you process shipments with real-time access to your order, invoice, and customer data to eliminate double entry and costly shipping errors.

These instructions will help you get StarShip installed and linked with Visual AccountMate as quickly as possible. Before setting up the interface, please perform the installation and setup steps described in the StarShip User's Guide.

### Using this guide

When you click a link that brings you to the User's Guide, select **Documents > Go Back Doc** from the Acrobat Reader menu when you want to return to your page here, in this guide.

#### Next

To flip to the next page, press the Page Down key on your keyboard or click the "Next" link located at the bottom of each page.

#### Back

To return to the previous page, click the "Back" link.

**Note:** The "Back" link brings you to the previous page you viewed, regardless of its location. To flip back through pages consecutively, press the Page Up button on your keyboard.

#### Links

[Blue text](#) indicates a link to the indicated topic.

### User's Guide

Click here to open the StarShip User's Guide.



# STARSHIP FOR VISUAL ACCOUNTMATE

## CREATE THE DATA SOURCE

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### Overview

StarShip accesses Visual AccountMate's data via the MS SQL Server or Visual Foxpro ODBC driver. The StarShip setup program automatically installs ODBC version 3.51 (the ODBC Administrator, Driver Manager, etc.), if it is not already installed.

If your accounting system is installed on the same computer as StarShip, the ODBC driver may already be installed and the Data Source may already exist. Otherwise, you must install the ODBC driver for the database and create a Data Source.

The Data Source specifies where your accounting data is and what driver should be used to access it.

The following steps show you how to create a Data Source.

#	ACTION
1	From the Control Panel, run the 32bit ODBC Administrator ("32bit ODBC") and click on the "User DSN" tab. <b>Note:</b> When using Windows NT or 2000, you must additionally double-click Administrative Tools before selecting ODBC Data Sources in this step.
2	Click on "Add" to create a new Data Source. Select the "Microsoft Visual Foxpro Driver" or "Microsoft SQL Server Driver."
3	A driver-specific setup screen will allow you to name the Data Source and specify the location of the data files. For Visual Foxpro, the Database Type should be "Visual Foxpro Database (.DBC)".
4	Click "Finish" to complete the setup. Should you need to change the Data Source, repeat the above procedure, selecting "Configure" instead of "Add" in step 2.

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## CUSTOMIZING THE INTERFACES

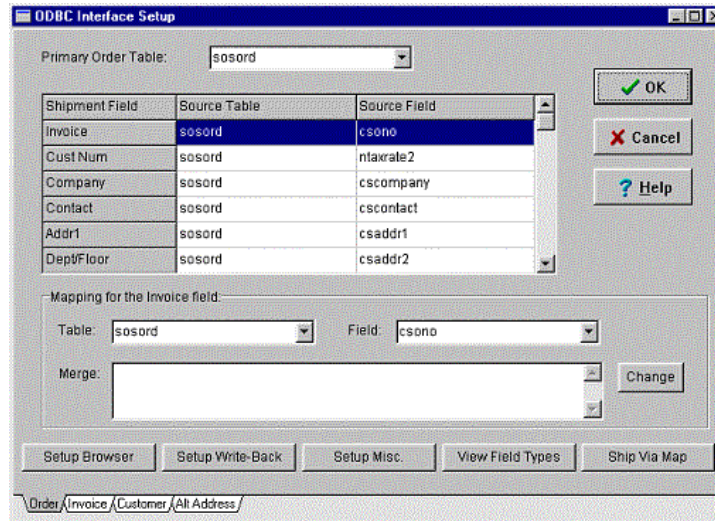
### Overview

StarShip comes with a default setup file that maps the shipping fields to the fields in Visual AccountMate. StarShip stores four different “maps” or interfaces corresponding to Orders, Invoices, Customers, or Alternate Ship-To Addresses. Each interface also includes settings on freight write-back, and browse screens that you can modify.

To customize the interface, select Setup, Accounting Interfaces, then Visual AccountMate from the main menu.

Note: If “Visual AccountMate” is not an option, click on Setup/Registration to verify that you have it installed (under “Accounting I/F”) If you need to purchase the option or get new registration codes, call our sales department at 800-462-4016. If you have a demo, press F10 from the main menu and choose “Visual AccountMate” then you can select Setup, Accounting Interfaces, Visual AccountMate.

You will be prompted to select the Data Source to connect to your data. The Setup Interface window will display.



## Select the Interface

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Click on the Order, Invoice, Customer, or Alt Address tabs to select the interface you want to view or modify.

## Primary Table

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At the top of the screen, the Primary Table for the current interface displays. For example, if you are setting up the order interface, the sosord (order header file) is selected. You should not have any reason to change this setting. Doing so will clear out all field mapping for the interface.

## Shipment Field Mapping

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The 3-column table in the middle of the interface setup screen defines the mapping between the shipment fields in StarShip and the Visual AccountMate data. For each shipment field (shown in the left most column) the source of the data is shown to the right in the "Source Table" and "Source Field" columns. To setup a field, highlight it in the grid. The panel "Mapping for xxxx field" below the grid lets you setup the field as follows:

**Table:** Choose the source table containing the field.

**Field:** Choose the field within the source table.

**Merge:** If the source table chosen is the primary table for the interface, then the Merge window will display. You can define additional fields in the primary table which are to be added or subtracted (or concatenated for strings) together. For example, if the order total is not stored in the order header, the COD amount shipping field might be mapped to the Subtotal field merged with the Total Tax field and Miscellaneous Charges field. Click on the Change button to define the Merge list.

## Where

If the source table chosen for the current field is not the primary table, the Where window appears. You must define a SQL (structured query language) “Where” clause that links the primary table to the source table for that particular record.

For example, the terms description is stored in a separate table. For the shipment field Terms, the source table is ARPyCd and the field is cDescript. Now StarShip needs to know how to get the correct ARPyCd record for a particular order. When you click on the Change button, you get the screen below.

ODBC Field Map Setup

For shipment field Terms:

SELECT cdescript FROM arpycd

WHERE  =  Primary Table Field

Shipment Field

Fixed Field

=  Primary Table Field

Shipment Field

Fixed Field

=  Primary Table Field

Shipment Field

Fixed Field

The “Where” clause can have up to 3 parts: “Where a=b AND c=d AND e=f”. You can click on the AND buttons to activate/deactivate the 2nd and 3rd parts of the clause. In this example, only one part is used. At the WHERE prompt, the cPayCode field is chosen (from the ARPyCd table fields), and linked to the primary table field cPayCode. This means, that StarShip should get the cDescript field from the ARPyCd table record which has a cPayCode equal to the cPayCode in the current order header record.

## Setup Browser

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Click on the Setup Browser button to choose which fields StarShip should use as key fields to select a record and which fields to display when “browsing” the records.

StarShip will try to determine the key fields automatically. If StarShip can determine them automatically, the Key Fields entry section will be disabled. If this function is not supported by your ODBC driver, you will get an error message “Driver unable to return key fields...” If this is the case, simply select one or more fields which can be used to uniquely identify a record in the primary table. For example, the key fields for an order table interface may be just the order number or a combination of the order number and order type field.

Under “Browse Fields” choose which fields you want to display in the browse window when selecting a source record. If you have a large table, you should keep the number of fields to a minimum to improve performance.

## Setup Write-Back

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Click on the **Setup Write-Back** button to define how freight charges are written back for the current interface. Each of the tabs on this screen are described below:

**Settings:** The “Add Freight to...” check box lets you Enable/Disable the freight write-back feature. When “Prompt to Add Freight” is checked, the user will be asked whether freight should be written back when a shipment is saved

**Freight Fields:** Choose one or more fields in the primary table that represent the Freight charges. These fields will be changed to the freight amount.

**Total Fields:** Choose one or more fields in the primary table that contain totals which need to be updated based on the difference between the original freight field amount and the freight amount being written back.

**Key Fields:** Choose one or more shipment fields which are mapped to fields in the primary table and can uniquely identify a source record. When you edit or delete a shipment, these fields are used to get the correct source record when updating the freight.

## Setup Misc

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Click on **Setup Misc** to modify miscellaneous interface parameters. Currently you can change the query row size for the browser. Increased values should increase speed but use more memory.

## View Field Types

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Click on **View Field Types** to view the data type for any field in any table in the data set.

## Ship Via Map

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If your accounting system has a table which stores all possible Ship Via values (code and description), you can set up a mapping for each one of these values by clicking on Ship Via Map. Before you can do this, you must map the **Ship Via field** to the **Ship Via "description"** field in the Ship Via table, and then set up the Where clause so that the Ship Via is linked to the primary table by Ship Via code.

When you click on Ship Via Map, check the "Enable Ship Via Mapping" check box. Then select the Carrier, Service, Package Type, and Freight Billing value that you want StarShip to bring up for each Ship Via in Accountmate. These settings can be changed on the Shipping window once you've selected a source record to ship against.

When Ship Via Mapping is disabled, StarShip will search for key words in the ship via description to determine the shipping method. StarShip will also use the key words to determine the default values displayed on the Ship Via Map screen.



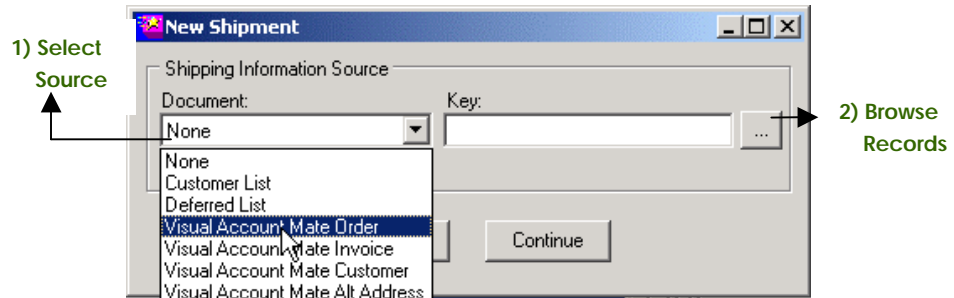
# STARSHIP FOR ACCOUNTMATE

## PROCESSING SHIPMENTS

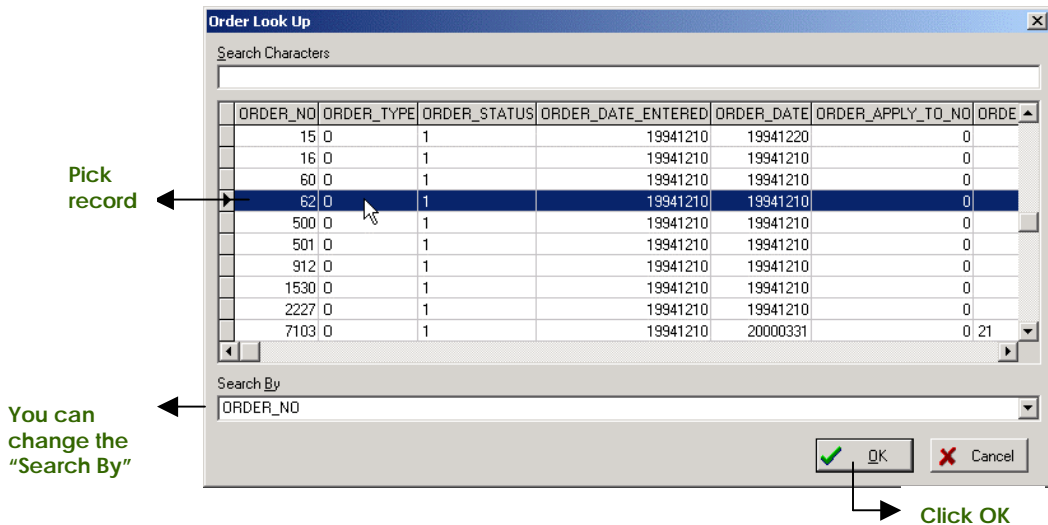
### Overview

The New Shipment dialog box allows you to select a source document to ship against. If you would like to ship without a source document, see [Ship Without a Source Document](#). ☺

Click the Document drop-down list to select the document to ship against. Selections are usually Order, Customer or Invoice records, or the StarShip Customer and Deferred lists.



When connecting to orders/invoices, you can populate the Shipping window by typing or scanning the number while in the Key field. Then press Continue. Or, browse all records by clicking the "..." button.

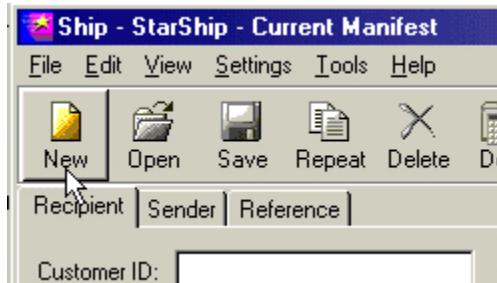


**Overview** This procedure briefly shows you how to ship with StarShip. We recommend reading the Shipping portion of the [User's Guide](#), which contains all shipping procedures, Shipping Window descriptions, and specific carrier-related details.

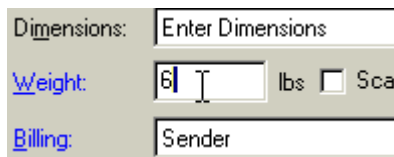
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## ACTION

- 1 On the Shipping Window, press the **New** button.



- 2 When the New Shipment dialog box appears, select a Document. If you don't want to select a source document, click Cancel.
- 3 Enter the weight, or use a scale to read package weight. Also, enter any other required shipment information.

A screenshot of the "New Shipment" dialog box. It contains three main input sections: "Dimensions:" with a text field containing "Enter Dimensions"; "Weight:" with a text field containing "6", a unit selector "lbs" with a checked checkbox, and a "Sca" checkbox; and "Billing:" with a text field containing "Sender".

- 4 Select [Package Options](#).  
Click the link above to read more about Package and/or Shipment options in the [User's Guide](#).
- 5 Add as many packages as you need by clicking Next, repeating steps 2-3. When you are done, click Save.

**Tip:** After viewing the User's Guide, you can return to this guide by selecting **Documents > Go Back Doc** from the Acrobat Reader menu.