Web Store Integration

User Guide
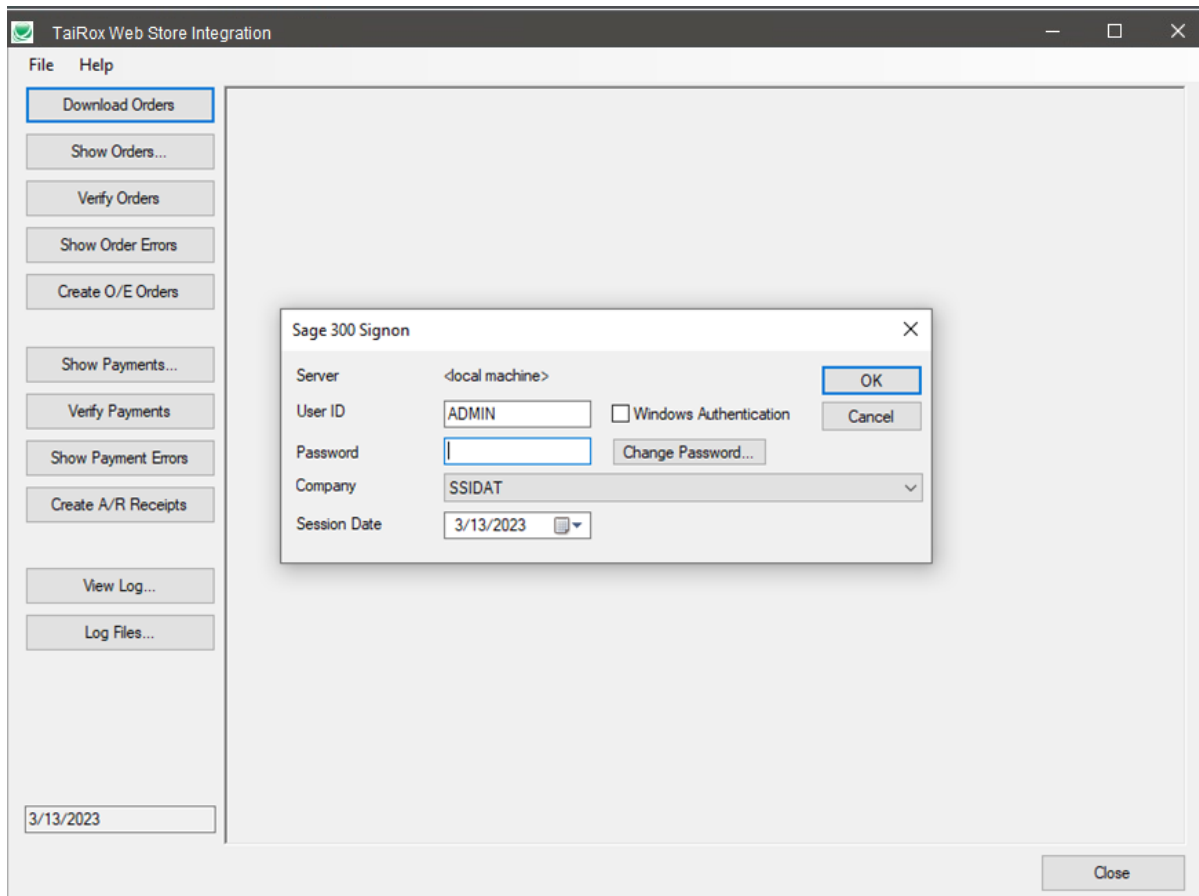
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Using Web Store Integration

Web Store Integration downloads orders and payments from your existing web store into Sage 300. Once the program has been installed, you can start the program from the Windows Start List: Start > All Programs > TaiRox Software > Web Store Integration

Log in to the Sage 300 Company to synchronize orders and payments from your Web Store.

- *If Web Store Integration has not been set up, the program will display the following message:*
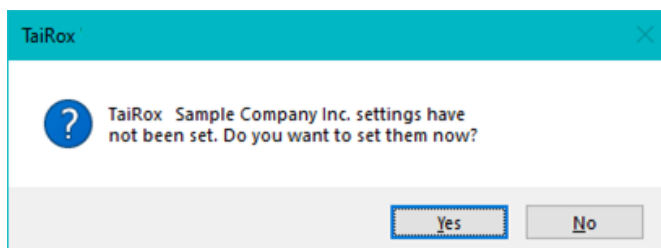
  - ○ **Click "Yes" to set up the program** and create an Intermediate Database used by Web Store Integration.
  - ○ **Click the "No" button to exit the program without setting up the database**.

Processing Webstore Orders

Processing orders from the Web Store involves a series of steps.

Click the Download Orders button to downloaded orders from the Web Store.

The download process has two stages:

- Downloading the files from the FTP site.

- And then storing the orders in the Intermediate Database.

The following screen shows that 462 orders were downloaded.

The log shows all orders that were successfully stored in the Intermediate Database, and it shows all errors detected during the second stage.

Orders with errors (in this example, the orders with missing item numbers) will not be stored in the Intermediate Database and will not be available to be created in Sage.
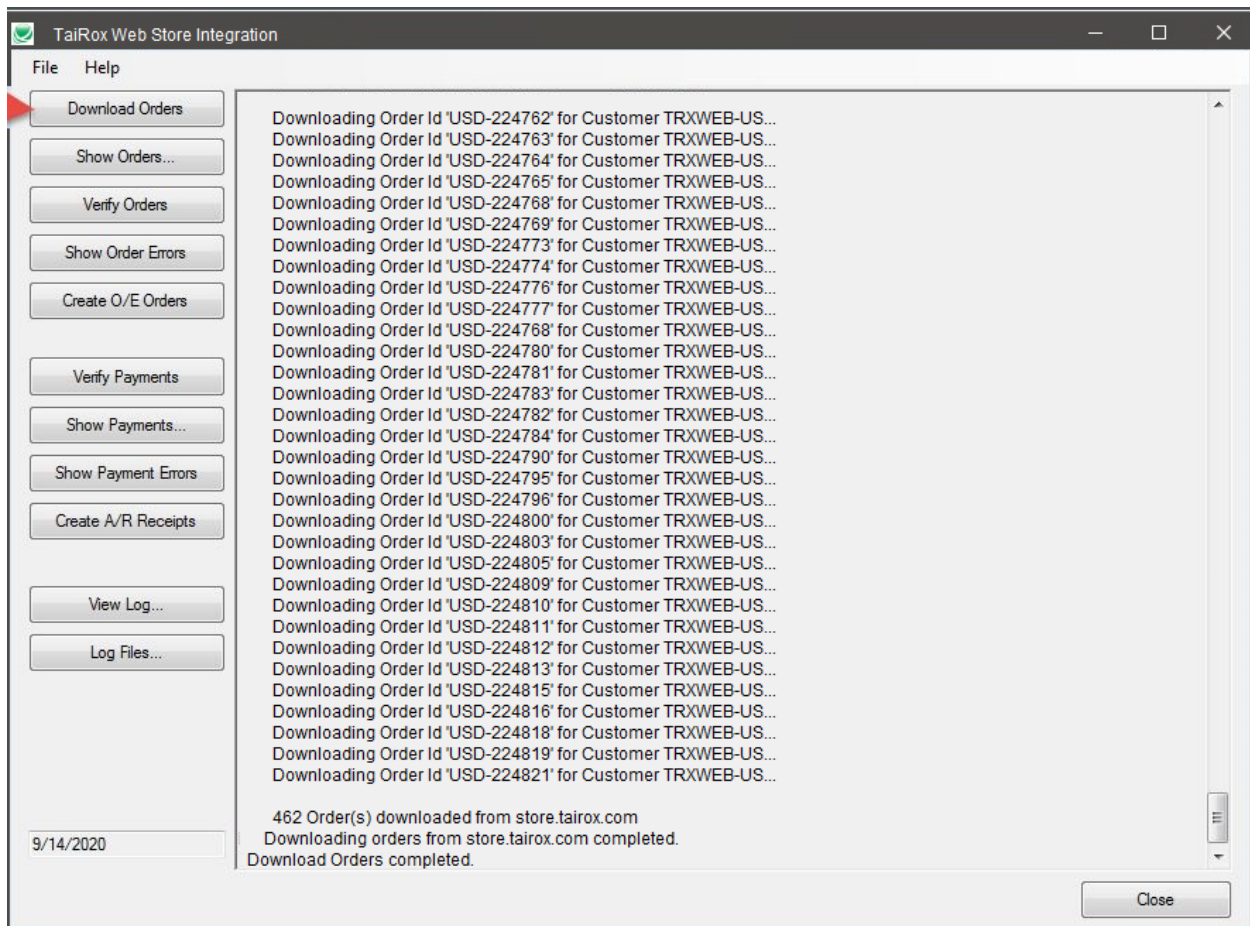
Click the Show Orders button to view downloaded orders from the Web Store.

You can view the downloaded orders, and any orders that have not yet been created in Sage 300 Order Entry, by clicking on the Show Orders button.

If you are logged in as the Sage 300 ADMIN user, you can delete orders that have not been processed.
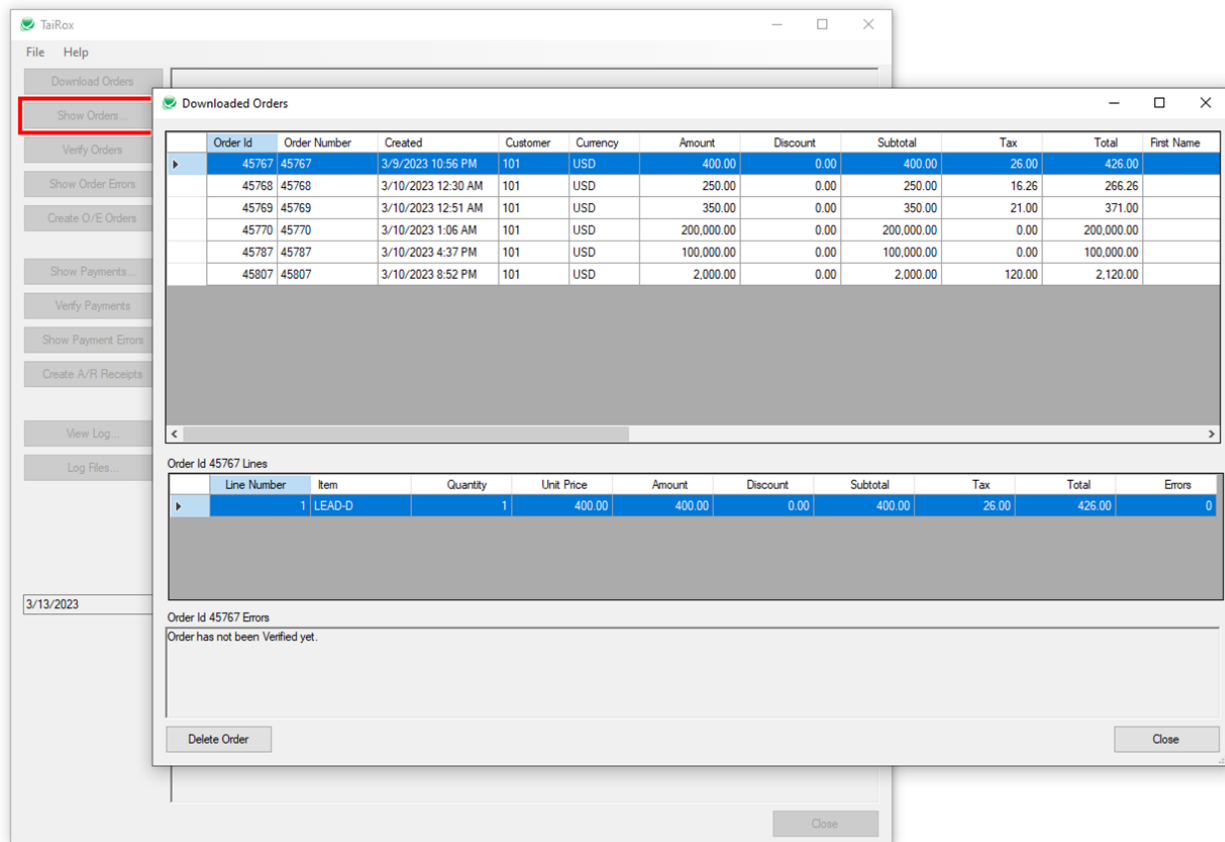
Click the Verify Orders button to verify downloaded orders.

Before Sage 300 Orders can be created, you must validate the downloaded orders that have been stored in the Web Store Integration Intermediate Database.

Click on the Verify Orders button to validate orders. If there are any issues with the orders, the program will display all errors in the log window.

Depending on the error, the appropriate corrections must be made in Sage 300 so the order can be created.

When you think that errors have been fixed, click the Verify Orders button again to ensure they have been corrected. Orders can only be created in Sage 300 when they are valid.

Click the Show Order Errors button at any time to display all orders in the Intermediate Database that still have errors in the log display window.

Click the Create O/E Orders button to create orders in Sage 300.

To create orders in Sage 300 from the Intermediate Database, click the Create O/E Orders button. Any orders that have errors will not be processed.

Processing Webstore Payments

Payments that are associated with orders are created in Sage 300 independently of orders.

Web Store Integration creates A/R Receipt Batches that contain prepayments for each order. The prepayments in A/R are created to match the A/R Invoice that's created when the Sage 300 order is shipped and invoiced.
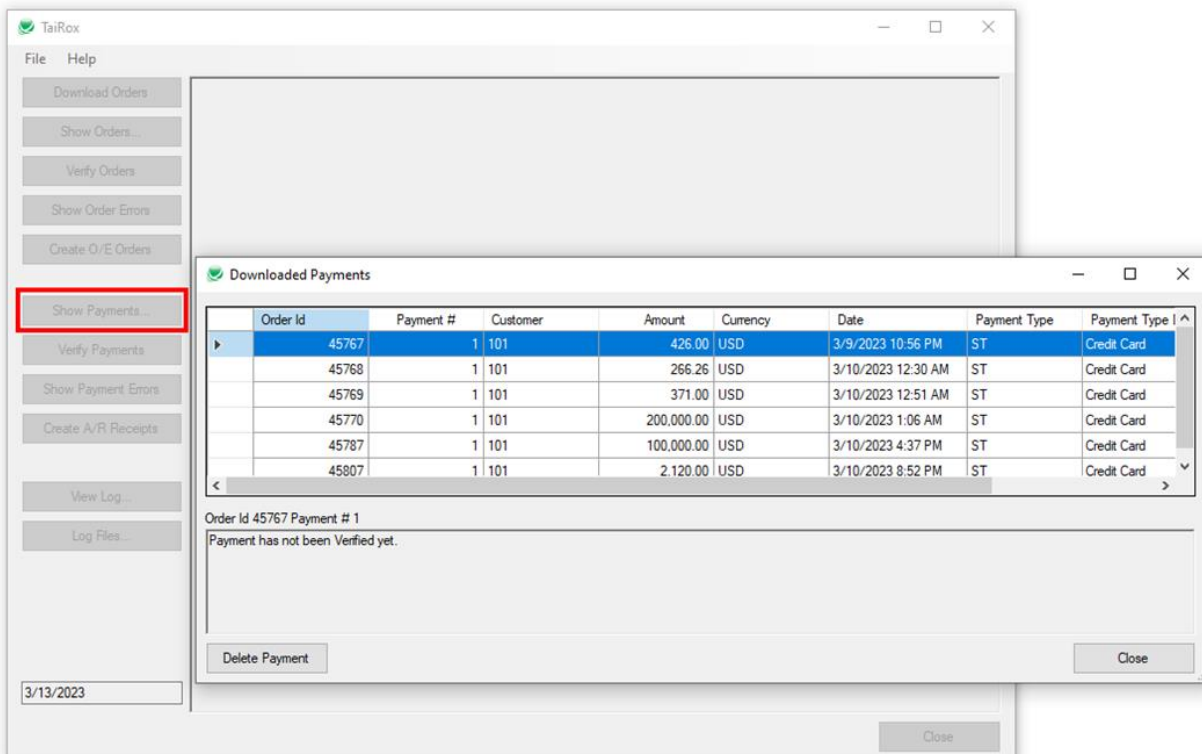
In other words when the A/R Order Entry Invoice is created, the prepayment will be applied to that invoice using the order number.

For further information on how this matching of invoices to prepayments works, see the Sage 300 Accounts Receivable and Order Entry documentation.

The payments process is analogous to creating orders: you must verify the payments, review and correct any errors, and then create A/R receipts.

Click the Show Payments button to view payments from the Web Store.

You can view any outstanding payments that have not been processed by clicking the Show Payments button. If you are logged in as the Sage 300 ADMIN user, you can delete payments that have not been processed.

Click the Verify Payments button to verify downloaded payments.

To verify payments, click the Verify Payments button. Any errors that have been found will be displayed in the log window. Depending on the error the appropriate corrections must be made in Sage 300 so the payment can be created.

Once all errors have been corrected, click the Verify Payments button again to check that all payments have been fixed. Payments can only be created in Sage 300 if they are valid.
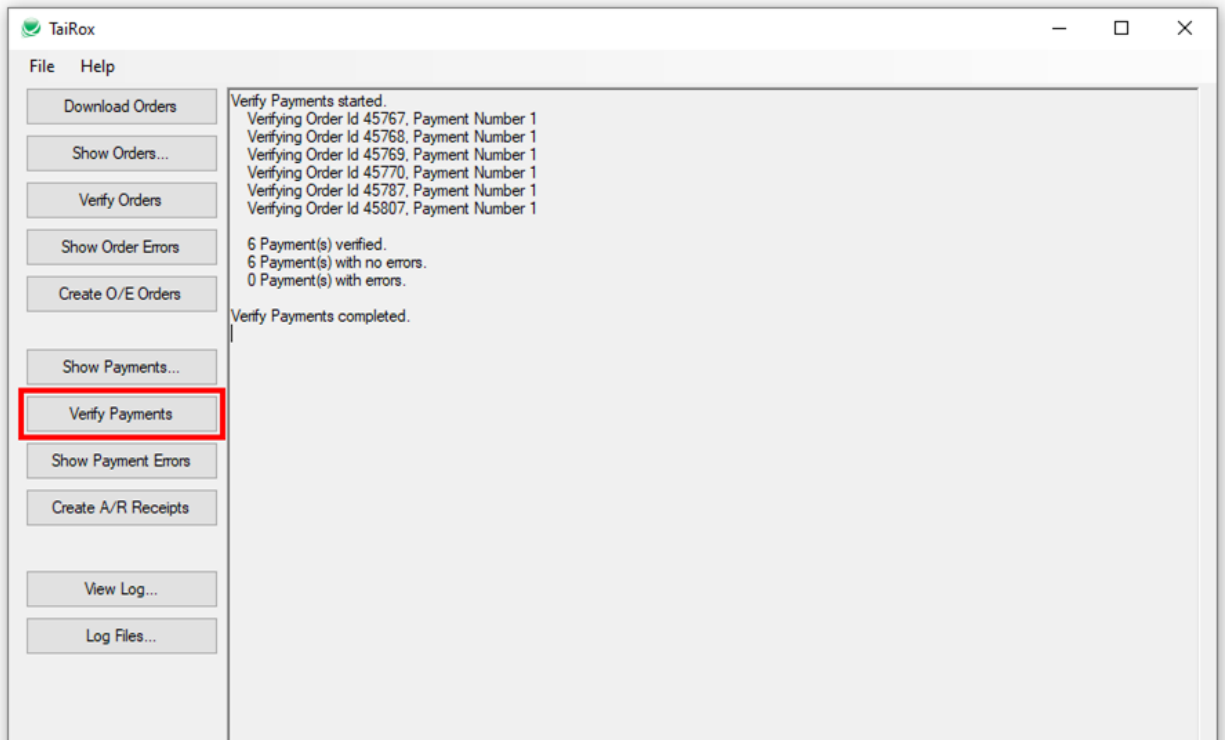
Errors in outstanding payments can be displayed at any time by clicking the Show Payment Errors button. Any errors will be displayed in the log window.

Click the Create A/R Receipts button to create receipts in Sage 300.

Once all errors have been corrected, you can click the Create A/R Receipts button to create a receipt batch. Payments with errors will not be processed.

Each time you click the Create A/R Receipts button, the program will create a new Receipts batch in A/R. To minimize the number of batches created, you can create A/R receipt batches at any time. You do not have to create A/R receipt batches each time that you download orders from the Web Store into the Intermediate Database.

Download Files and Log Files

Viewing Download Files

Web Store Integration stores its working files in the Sage 300 SharedData folder for your company. For example, the folder for SAMLTD could look like this:
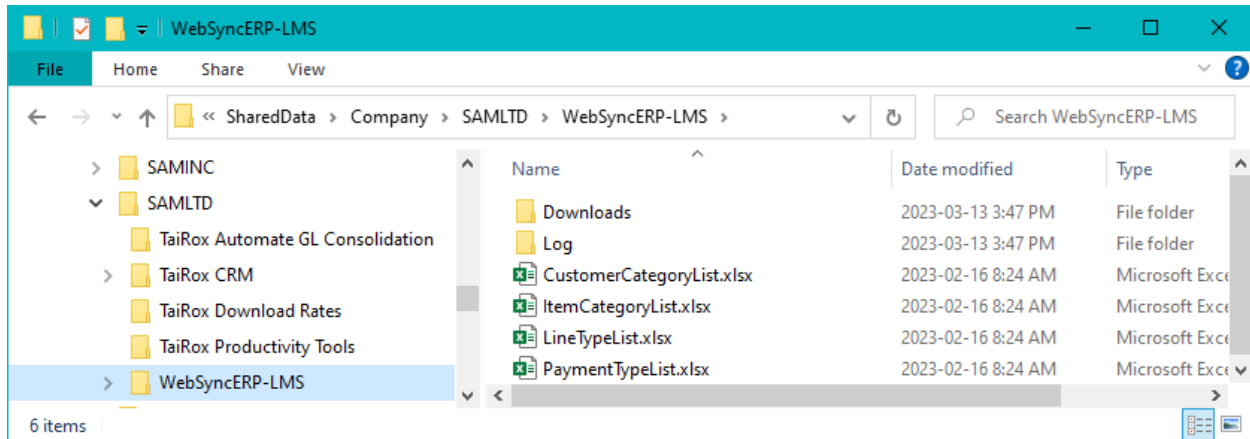
The Downloads folder contains two subfolders – Stored and Error.

- Downloaded order files (.json) from the FTP site are initially placed into the Downloads folder.

- During processing they are moved to the Stored or to the Error subfolder.

    o Orders that are added to the Intermediate Database are moved to the Stored folder where they are archived. The program does not need them again.
    o Orders that have errors and were not stored in the Intermediate Database are moved to the Error folder.

- The download process logs the errors.

Note regarding errors:

If you cannot fix an order in the webstore, you may have to fix the file in the Error subfolder and then move it back into the Downloads folder (parent of Error folder) so it can be reprocessed.

Viewing Log Files

To view a log of all processing that has taken place in the current session, you can click the View Log button.

Logs for a previous day's sessions can be listed by clicking on the View Logs button. Logs are kept in a directory, and, to reduce clutter, you should delete any older logs that are no longer needed.

Setting Up Web Store Integration

To set up Web Store Integration:

- Start the program from the Windows Start List:

    o   Start > All Programs > TaiRox Software > Web Store Integration

- Log in to the Sage 300 Company to synchronize orders and payments from your Web Store.

- *If Web Store Integration has not been set up, the program will display the following message:*

    o   *Click "Yes" to set up the program* and create an Intermediate Database used by Web Store Integration. The following setup screen will appear.

Sage 300 Information

In some situations, customers may exceed their credit limits set in Sage 300 for Web Store orders they placed.

Because the order has been placed in the Web Store, and presumably the order has been fullfilled, there needs to be a way to override the credit limit when creating a Sage 300 Order. This is the reason for the Sage 300 Credit Approval User ID – to allow credit limits to be overridden.

It is best practice to create a Sage 300 user that is solely used for Web Store credit limit overrides, with a password that is set and never changed.

Sage 300 Orders can automatically be shipped and invoiced if you check the "Ship Orders" and "Invoice Shipments" check boxes at the bottom of the form.

Spreadsheets

Customer Category List – a spreadsheet that allows the item category code to be overridden based on the customer number. For a given customer number you can specify the item category code to be used for each order detail line. Click the Open button to start Excel and specify customer number to item category code mapping information.

Line Type List – a spreadsheet that allows the webstore line type to map to either an item line type in Sage 300, or to a miscellaneous charge code.

Item Category List – a spreadsheet that allows the mapping of webstore item numbers, or item numbers that have been mapped to specific Sage 300 item categories. The item category mapping takes precedence over the customer category mapping.

Payment Type List – a spreadsheet the allows the mapping of a webstore payment type to a Sage 300 Bank Code and Payment Code.

Verify Settings

You can check all Web Store Integration settings by clicking each of the Verify buttons for FTP Web Store information, Intermediate Database information, and Sage 300 information. Before clicking the Save button, click each Verify button.

Save Settings

Once all settings have been entered and verified, click the Save button.

If the Intermediation Database does not exist, you will be prompted to create one. Web Store Integration will create the Intermediate Database using the information entered in the Settings dialog.

Once the Intermediate Database has been created, the program will display a confirmation message, and Web Store Integration will be ready to process orders and payments from the Web Store.