interprise suite™

<u>Web Shop Connectors</u>

We have some specific out the box connectors that use the web shops API to do some basic things like update the web site order status, sell price and stock qty from Interprise and to bring in sales orders to Interprise.

The Interprise API allows your web developer to do it all but this probably means more cost from them. It depends on your requirements and how bespoke they are. The connectors are designed to reduce the level of work required by your web developer to get orders in and basic information out of Interprise.

Typical things your web developer could do using the Interprise API:

- Use "The Basics – New Lead" end point to create a "Lead" record in Interprise when you get a web enquiry so it can be followed up.

- Use the "B2B" end points so when your customer logs in they get to see all their quotes, orders, statement of account, RMAs, Invoices/Credits, Cases (with details) whether they were created in the web shop or Interprise. These end points display the data <u>live</u>. (See other API documentation for examples)

- Use "B2B – Get Customer Item Price" end point to get the customer price using the same logic as Interprise. This allows you to show for a logged in customer their specific prices not the default sales price.

- Use "The Basics – GET Items" end points to create items in the web shop from Interprise. It is normal for the web shop to have many items that you may only want to setup in Interprise if you get an order for them. We have an option for that in the connector already to create them as part of bringing in the order. Or you can Create items in Interprise by using POST Items.

- If not using a Connector then Use "The Basics – POST Sales Orders" to create Sales orders in Interprise.

- If not using a Connector then Use "The Basics – GET Status, Qty or Sell Price" to update sales order statuses, get stock qty and sell prices from Interprise.

We summarise the level of integration and logic of the Connectors below:

To Interprise from "Connector Web Shop" section:

Post Sales Order Options:

- Customer Record Options :

1. "Create New Customer Record or Use Existing Record if Already Created"
or 2. "Use Existing Record if Already Created (Don't create new customer records) or Use Default eCommerce Customer – Pick Interprise Default eCommerce Customer Record"
or 3. Use Default eCommerce Customer – Pick Interprise Default eCommerce Customer Record"

(If a Company Name is entered in the web site order then we would use this as the Customer Name. If its blank then the customer name will be the same as the contact name).

(If using Default eCommerce Customer then no Customer record or Ship To record would be created. A Contact record is created in all instances and assigned to the order though).

- Link Customer Records by using email address

- Link Ship to Records by Postcode.

(If a Ship to already exists with this postcode for a specific customer then use it otherwise create a new Ship To for that customer. In all instances over write the order with the ship to from the web site order though in case it changed).

- Link Contact Records by using email address

- Shipping Method Translations (If non specified then it will use the default in Interprise)

- Payment Type Translations (Use ";" to assign multiple to the same payment type) (If non specified then it will use the default in Interprise)

(So the payment goes into the correct bank account. The receipt value will always be the value taken by credit card even if the order is less or more due to any rounding differences).

- Use "Business" or "Consumer" Class Templates for other defaults when creating a customer.

- Link Stock item records by using Interprise Item Name and Connector Stock Code field

- Stock Item Line Options for Orders:

1."If Normal Stock Item does not Exist Create it"
Or 2."Use Non Stock Item for Items that don't exist– Pick Interprise Non Stock Item to use with their description" (The description in Interprise will have the SKU+Description of the item from web shop).
Or 3."Produce error message and hold order"

(It will not create kit, Matrix groups or assembly items. A Kit item would be entered into the sales order as an item line with the default kit + options. Assembly items would be entered into the sales order like a normal stock item line.)

We will populate sales orders with a Reference 2 that shows the Connector Type + ID + Order Number e.g. MAG-01-ORD-00001. If we wanted to print a different Logo / Trading style on the Delivery note, Invoice etc. for orders, based on the web site the order came from, then we can do this using this ID.

From Interprise to Connector / Web Shop

Sales Order Status Update

- Translation of Statuses from Interprise to Web Shop (Use ";" to assign multiple)

Update Stock Qty

- Pick Interprise Warehouse All, multiple or just 1, - Use "In Stock Qty" or "Free Stock Qty" or "Potential Stock Qty" (In Stock – On SO + Already on PO)

Update Sell Price

- Use "Retail" or "Wholesale" pull down or Pick "Price List". (Not customer logged in specific pricing)

Limitations

Magento 2 API does not support "/" in the stock sku. These could be replaced with "-".

Magento Orders need to be set to be at least 5 mins old as Magento saves the order as pending without a payment when the customer goes through the checkout. If we did not wait we could import an order with no receipt.

Connectors - 5 - Magento2

Home   Num Key 0

New | Save and New | Save | Save and Close | Undo | Delete | Print | Refresh | Help

List | **Connector** | Error Log | Service Status

| User Name | Admin User |
| Connector Type | Magento2 | Connector Description | Magento2 |

Connector Login Details

URL	www.apexit.co.uk
Key	key1121
Enabled Service	☐
Send Error Log to Email Address	
Interprise User Email Box to send emails in Interprise	

To Interprise from "Connector"

Sales Orders ☐ Check every 10 minutes   Status Codes pending;processing

◉ Create New Customer Record or Use Existing Record if Already Created

◯ Use Existing Record if Already Created (Don't create new customer records) or Use Default eCommerce Customer

◯ Use Default eCommerce Customer

Link Customer Records

| Interprise Customer Code field | Connector Customer Code field |
| Entity Email Address | email_address |

Payment Type Translations

Payment Type Code	Payment Type Code in Connector
Cash/Other	
Check/Cheque	
Credit Card	
Voucher	

Shipping Method Translations

Shipping Method Code in Interprise	Shipping Method Code in Connector
APC- UK Mainland (3-5 Days)	
APC- UK Mainland (Pre 12:00)	
Order Value Amount	
RM 1	
Standard Delivery Charge	
Weight Shipping Method	

◉ If Normal Stock Item does not Exist Create it

◯ Use Non Stock Item for Items that don't exist

◯ Produce error message and hold order

Link Stock item records

| Interprise Stock Code | Connector Stock Code field |
| Item Name | sku |

Class Templates for other defaults when creating a customer   Consumer

From Interprise to Connector / Web Shop

Sales Order Status Update ☐ Check every 10 minutes

Sales Order Status Translation from Interprise to Web Shop

Interprise Sales Order Status	Web Shop Status
Approve Credit	holded
Completed	complete
Dispatched	processing
Print Pick Note	pending
Ready To Invoice	processing
Ready To Post	processing
Void	canceled

Stock Qty

Update Stock Qty	☐ Check every 10 minutes ☐ Refresh All
Warehouse	☑ All Warehouse MAIN
Qty to Use	◉ In Stock Qty ◯ Free Stock Qty ◯ Potential Stock Qty

Sell Price

| Update Sell Price | ☐ Check every 10 minutes ☐ Refresh All |
| | ◉ Retail ◯ Wholesale ☐ Price List |