# **Setting Up Ecommerce Integration**

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# **Overview**

Setting-up e-commerce integration involves several steps and tasks. This article discusses the prerequisites and procedures that need to be completed to successfully set up an integration.

# **E-commerce Integration Considerations**

Before the setting-up your e-commerce integration, insure that you have the following:

- Your own business website
- You have generated the connection settings

# **Setting Up E-commerce Integration**

1. From the homepage, click on the *Gear* icon to access the *Admin* screen.

**OrderTime** Number n, Inc. 💏 Home 🛷 Sales 🎘 Purchasing 🛷 Repairs 😯 Warehouse 🔹 Reports 2. Click Ecommerce Integration under the General section. **OrderTime** 0 👫 Home 🛷 Sales Purchasing 🗑 Wa 😫 Reports Admin Create New 👻 General Settings Users & Roles Open Full List 🚽 Import Company Info Roles Recent Records Profile Lists Company Preferences Users Doc Status Custom Fields Billing and Subscription **2** 12008 Page Layouts Alerts Focus Innovation Group LLC DBA ARC Lighting ECommerce Integration Email Templates **£** 12023 Shipping Integration Form Templates Accounting Integration Domain Verification **£** 11855 Label Printing **511**  EDI Integration REST Api B2B Customer Portal Other Integrations Mail and Calendar Integration Create Support Login 3. Select **Active** and click the **Add Cart** button. Admin > ECommerce Integration Add Cart **ECommerce Integration** ● Active ○ Inactive ○ Both

4. Select the **e-commerce cart** that you want by clicking the *Add* button.

dd Cart					
Magento		3d Cart		Bigcommerce	
(j) Magento Add	More than 240,000 business choose Magento eCommerce Solution.	Software Solution.	Shopping Cart Software that is easy to use. Build your online store from your web browser with this eCommerce	business, BigComm help you sell more	BigCommerce Shopping Cart Software is the solution for fast-growing brands. No matter what size your nerce has a solution that will
Shopify		Woocommerce		Volusion	
🞒 shopify	Whether you sell online, on social media, in store, or out of the trunk of your car, Shopify has you covered.	WOO COMMERCE	The most customizable eCommerce platform for building your online business	Volusion	Shoppers spent more than \$26 billion and placed over 185 million orders on Volusio ecommerce websites.

In the ECommerce Integration Editor page, enter and set the specifications for the integration in the available tabs.

<b>OrderTime</b>		Search	(	Q		All Orders Demo     Logout
# Home	🎻 Sales	🗮 Purchasing	Q <sub>0</sub> <sup>0</sup> Production	🗑 Warehouse	Reports	
Admin > ECom	merce Integration	n + ECommerce Integration	n Editor			
Configure S	hopify Store					Save Can
General	Preferences	Sales Tax Mapping	Ship Method Mapping	Payment Metho	d Mapping	ount Mapping Schedule
Website N	lame					
Api	URL					
Userr	ame					
Pass	word					
	🗹 Is Priva	ate App				
	Test Cor	nnection				
	Import	t Orders				
	🗹 Updat	e Order Status				
	🗹 Update	e Inventory				
	🗹 Cal	culate Items that can be m	ade			
	Inc	lude inventory on Purchase	e Orders			
	🗌 Inc	lude Item Vendor Quantity				
	Import	t Products				
	Item	Group Parts Group	,	~		
	Use Or the car		update existing products in			
	Custor	m Cart Items Use the follow	ving:			
			w			

#### • General

This section where you add the connection credentials you generated from the cart's website. This is also used to test the connection and integration of the carts and Order Time

- 1. Make sure that you have generated the credentials from the e-commerce web store or shopping cart. Refer to Carts to know the steps for getting the connection settings for a specific cart.
- 2. The credentials are the connection settings that you need to provide in the required fields under General tab: Website Name, Api URL, Username and Password. Refer to Carts for the the connection settings for your specific cart.
- 3. Select what you need from the options provided by clicking the corresponding checkbox as follows:
  - Update order status
- 4. Select at least one location if you want to limit the inventory to specific location(s).
- 5. Click Test Connection.
- 6. Update Order status is a preference for

# 7. Update inventory

- 1. Calculate Items that can be made
- 2. Include inventory on Purchase Order
- 3. Include Item Vendor Quantity

# 8. Import Products

- 1. Ensure that you specify what group you would like items to be imported into
- 9. Use Order Time to create new or update existing products in the cart
- 10. Custom Cart Use the following: Choose your Custom Cart Items
- 11. Click Save.

Configure Shopify Store								Save Cance
General Preferences	Sales Tax Mapping	Ship Method Mapping	Payment Method Mapping	Discount Mapping	Schedule			
Complete when you do not want	each customer to be	saved in the accounting cu	stomer list.					
When the customer is taxable		When the custome	r is non-taxable					
		•		*				
		ted Customer in OrderTime						
When creating customers and a	ldresses							
Identify customers by	First and last name		~					
Identify address by	Street address		~					
Default Customer Type	Retail		~					
Default Sales Rep	Dan Richard Plumbi	ng & Heating	~					
	Truncate Name F	ields						
Match Item Name With	Name		~					
Inventory Sync With	Net Available		~					
When creating orders								
When should the order come in				Wh	en the transaction is created i	in Order Time		
Web Order Status	Unshipped		~		Туре	SalesOrder	~	
Secondary Web Order Status	None		~		Initial order status	Approved	~	
Financial Status	Paid		~		Default Location		~	
Sales Channel Filter					Default Class	Retail	~	
Shopify Status	open		~		Map web order number to	Test Cust Field	~	
				Pla	ce order on hold if greater than	200		

## • Preferences

The Preferences section is used primarily to control how customers are created in Order Times.

• Complete when you do not want each customer to be saved in the accounting customer list

To see more about using this feature see: Using Proxy Customers for Ecommerce Orders

The integrator must know if the customer is classified as taxable or non-taxable. The appropriate sales tax code and item sales tax must be determined when creating a customer and/or sales order.

• When creating customers and addresses

The Integrator will create customers and ship to addresses if they do not already exist in Order Time. The integrator should be instructed to uniquely identify the customer and ship to addresses by selecting the option that is most appropriate for your company.

Optionally, you can also select the default customer type and/or sales rep when these customers are created.

Additional options when creating customers (and orders) are available in the Sales Tax Mapping, Shipping Method Mapping and Payment Method Mapping.

- When creating orders
  - Web Order Status: Processing, On Credit Hold, Payment Pending, Approved, Voided,

and Closed.

- Secondary Status: Choose if necessary
- Financial Status: Status to automatically set for Payment info
- Sales Channel Filter: Set if necessary
- Shopify/Ecomm Status: Sets the status for the order over in your Ecommerce Integration

Regardless of Status if an Order is Archived it will NOT be imported!

- When the transaction is created in order time
  - Type: Choose between Sales Order/Ship Doc
  - Initial Order Status: Status to be set when creating the transaction
  - Default Location: Default Location for these transactions
  - Default Class: Default Class to set for these transactions
  - Map Web Order Number to: Custom field that can be used to map your Web Order Number which is the number for this transaction in your Ecommerce Cart
  - Place Order on Hold if Greater Than: If an order is imported that is greater than the total entered in this box then the order will automatically be placed on hold in Order Time. Leave blank if you do not want to enable this option.

Admin + Econmerce Integration + Econmerce Integration Editor         Configure Shopify Star         Seneral       Preference       Sales Tax Mapping       Ship Method Mapping       Payment Method Mapping       Discount Mapping       Schedule         Identify tax status by       Billing address			🖨 Reports	🗑 Warehouse	0° Production	sing	📜 Purcha	🏘 Sales	者 Home
General Preferences Sales Tax Mapping Ship Method Mapping Payment Method Mapping Discount Mapping Schedule     Identify tax status by   Billing address     Taxable     Default Sales Tax Code   Tax   Tax Code     FL     Von Taxable     Default Sales Tax Code     Item Sales Tax   Cart State     Action     Default Sales Tax Code     Item Sales Tax     Default Sales Tax Code     Item Sales Tax     Cart State     Action     Default Item Sales Tax     Default Item Sales Tax     Default Sales Tax Code     Item Sales Tax     Item Sales Tax     Item Sales Tax     Default Item Sales Tax     Default Item Sales Tax     Item Sales					or	ntegration E	on   ECommerce I	merce Integratio	Admin 🕨 ECom
Identify tax status by Billing address   Taxable   Default Sales Tax Code   Tax   Tax Code   Tax Code   Tax Code   FL   Von Taxable     Default Sales Tax Code   Non Taxable     Default Item Sales Tax     Perfault Sales Tax Code     Item Sales Tax     Cart State     Action     Default Sales Tax Code     Non Taxable     Default Item Sales Tax   FL   Default Item Sales Tax   FL   Default Sales Tax Code   Non   Default Item Sales Tax   FL   Default Sales Tax Code   Non   Default Sales Tax Code     Non							e	Shopify Stor	Configure
Taxable   Default Sales Tax Code   Tax   Default Shipping Sales   Tax Code   Default tem Sales Tax   Item Sales Tax   Cart State   Action     Item Sales Tax     Non Taxable     Default Sales Tax Code   Inter Sales Tax   Inter Sales Tax     Non Taxable     Inter Sales Tax   Inter Sales Tax	Schedule	Discount Mapping	nod Mapping	Payment	Ship Method Mapping	apping	Sales Tax M	Preferences	General
Default Sales Tax Code   Tax   Default Shipping Sales   Tax Code   Default tem Sales Tax   FL   Non Taxable     Default Sales Tax Code   Non   FL   Default Sales Tax Code   Non   FL   Default Sales Tax Code   Non   FL   Contact State Sales Tax   Non				~			Billing address	tax status by	Identify
Default Shipping Sales   Tax Code   Default Item Sales Tax   FL     Non Taxable     Default Sales Tax Code   Non   Default Sales Tax Code   RL   Default Sales Tax Code   RL   Default Sales Tax Code   Non   Pefault Sales Tax Code   Non   Von Taxable									Taxable
Tax Code   Default Item Sales Tax   FL   Specific State Mapping   Item Sales Tax   Cart State   Action     Non Taxable     Default Sales Tax Code   Non   Patult Shipping Sales   Non				~			Tax	ales Tax Code	Default S
Default Item Sales Tax FL   Specific State Mapping     Item Sales Tax     Item Sales Tax     Non Taxable     Default Sales Tax Code   Non   FL   Default Shipping Sales   Non				~			Tax	Shipping Sales	Default S
Specific State Mapping     Item Sales Tax     Cart State     Action     Item Sales Tax     Cart State     Action     Non     Pefault Sales Tax Code     Non     FL   Default Shipping Sales     Non								Tax Code	
Non Taxable     Default Sales Tax Code   Default Sales Tax Code   Default Sales Tax Code   Non   Default Sales Tax Code   Non				~			FL	tem Sales Tax	Default I
Default Sales Tax Code     Non       Default Item Sales Tax     FL       Default Shipping Sales     Non				Action	A	Cart Stat	tem Sales Tax	State Mapping	Specific S
Default Sales Tax Code     Non     ~       Default Item Sales Tax     FL     ~       Default Shipping Sales     Non     ~									
Default Sales Tax Code     Non       Default Item Sales Tax     FL       Default Shipping Sales     Non									
Default Sales Tax Code     Non       Default Item Sales Tax     FL       Default Shipping Sales     Non									
Default Sales Tax Code     Non     ~       Default Item Sales Tax     FL     ~       Default Shipping Sales     Non     ~									
Default Sales Tax Code     Non     ~       Default Item Sales Tax     FL     ~       Default Shipping Sales     Non     ~									
Default Sales Tax Code     Non       Default Item Sales Tax     FL       Default Shipping Sales     Non									
Default Sales Tax Code     Non     ~       Default Item Sales Tax     FL     ~       Default Shipping Sales     Non     ~									
Default Item Sales Tax FL V Default Shipping Sales Non V								e	Non Taxab
Default Item Sales Tax FL V Default Shipping Sales Non V								alas Tau Carla	Defects
Default Shipping Sales Non 🗸				~					
				~			FL	tem Sales Tax	Default I
Tax Code				~			Non	Shipping Sales	Default S
								Tax Code	

#### • Sales Tax Mapping

If you charge sales tax, the integrator must know the appropriate sales tax code and item sales tax to use when creating customer and/or sales order. This is done by examining the state in the Billing Address. You can also identify the customer's state using the shipping address.

In Order Time, sales tax calculations are driven by the combination of Sales Tax Code and Item Sales Tax.

*Note:* For non-US customer, only the Sales Tax Code is needed. The Sales Tax codes determine whether the customer is taxable and the Item Sales Tax is the rate at which sales tax is charged.

- Taxable customers
  - Select the *Default Sales Tax Code*. This is typically 'Tax'.
  - Select the *Default Item Sales Tax*.
  - Specify the state mapping. For each state in which you charge sales tax, select the *Item Sales Tax* and type the **state** (usually the abbreviation) into the grid cell. To delete the entry, select the row on the grid and press the delete icon under the *Action* column.
  - Add any specific State mapping that applies
- Non-taxable customers
  - Select the *Default Sales Tax Code*.
  - Select the *Default Item Sales Tax*.
  - Select the *Default Shipping Sales Tax*.

eneral Preferences Sales Tax Ma	Ship Method Mapping	Payment Method Mapp	ing Discount Mapping	Schedule
Default Ship Method	UPS		•	
Specific Ship Methods	Ship Method	Cart Ship Method	Cart Carrier	Action
	UPS	shopify		×

#### • Ship Method Mapping

Typically your cart orders will have shipping method and charges. The integrator needs to know how to map the shipping methods in your cart with the shipping methods in Order Time. If Order Time orders does not find the correct shipping method then the sales order created in Order Time will not be accurate.

- At the minimum, you should select a default shipping method. This is used when Order Time associates the shipping method used on the cart with a shipping method in Order Time.
- You can also specifically map the shipping methods in Order Time with the shipping methods in your cart. Using the drop down list, select a *Ship Method* and type in the associated *Cart Ship Method*.
- Enter the **Cart Carrier**.
- The integrator can either enter the shipping amount in the Freight box on the sales order or as a separate line item. To use a separate line item, check the box and 'Add shipping amount as a line item using the item' and select an *ltem*.
- To use the Freight box, the shipping methods in Order Time must have an associated

Other Charge Item. To do this, go in Order Time and from the main menu select Lists --> Profiles Lists --> Shipping Methods. Then for each shipping method, select an 'Other Charge' from the drop down list and click **Save**. If the drop down list is empty, create an item using the 'Other Charge Group'.

	s Tax Mapping Ship Metho	od Mapping Payme	ent Method Mapping	Discount Mappin	ig Schedule
	Import payment				
Default Payment Method	Cash [CashCheck]		~		
Default Terms	Net 30		~		
pecific Payment Methods & Terms	Payment Method	Terms	Cart Pay	ment Method	Action

#### • Payment Method Mapping

If you want the integrator to add a payment to a sales order then you will need to supply a Payment Method and Term. If you want to enter the payments manually outside of Order Time, leave the Payment Method and Terms blank.

In Order Time the Term defines whether a payment is required. You control this by setting the Term Type for each Term within Order Time (Lists --> Profile Lists --> Terms). In order for the payment to show when the order is created, the Term Type cannot be Account Receivable (No-cash payment).

#### 1. Check Import payment.

- 2. You can either specifically map a payment method and term to the cart payment method or you can use the Default globally.
- 3. To specifically map a payment method and term to the cart payment method, select the *payment method* and *terms* from the drop down list and type the *cart payment method* into the box grid cell.
- 4. Click Save.

eneral Preferences Sales Tax Ma	pping Ship Method Mapping	Payment Method Mappir	Discount Map	ping Schedule
Discount	Std	~		
Specific Discount Mappings	Discount	Cart Discount	Action	
	Std	35	×	

• Discount Mapping

- 1. Set the default Discount
- 2. For specific Discount Mappings, put each in individually
- 3. Hit Save afterwards to save any edits

General F	Preferences	Sales Tax Mapping	Ship Method Mapping	Payment Method Mapping	Discount Mapping	Schedule	
c	Enable Sche	duling					
Frequenc	<b>y</b> Daily		~				
	Every 1	day(s) at 12:00	AM				

# • Schedule

Set the frequency integration job by following these steps:

- 1. Click the **Enable Scheduling** box.
- 2. Select the **Frequency** from the picklist.
- 3. Set the recurrence by selecting the interval and time.
- 4. Click Save.

## **E-commerce Job**

The Sync Job is how Order Time controls what gets synchronized with your cart. You can initiate an e-commerce job to sync right away or you can put it in your schedule. With e-commerce integration, once you add your credentials and initiate connection testing, the scheduling starts immediately

A Sync Job must be finished before another one can be created.

The e-commerce job triggers the importing of orders and customers from your web site, as well as, updating the order status and inventory quantities to your website. You will be informed via email when an E-commerce Job is completed and if there any errors. You can click the hyperlink to view the errors.

# More about Ecommerce with Order Time Inventory