

PIMS-X SHOPSITE INTEGRATION

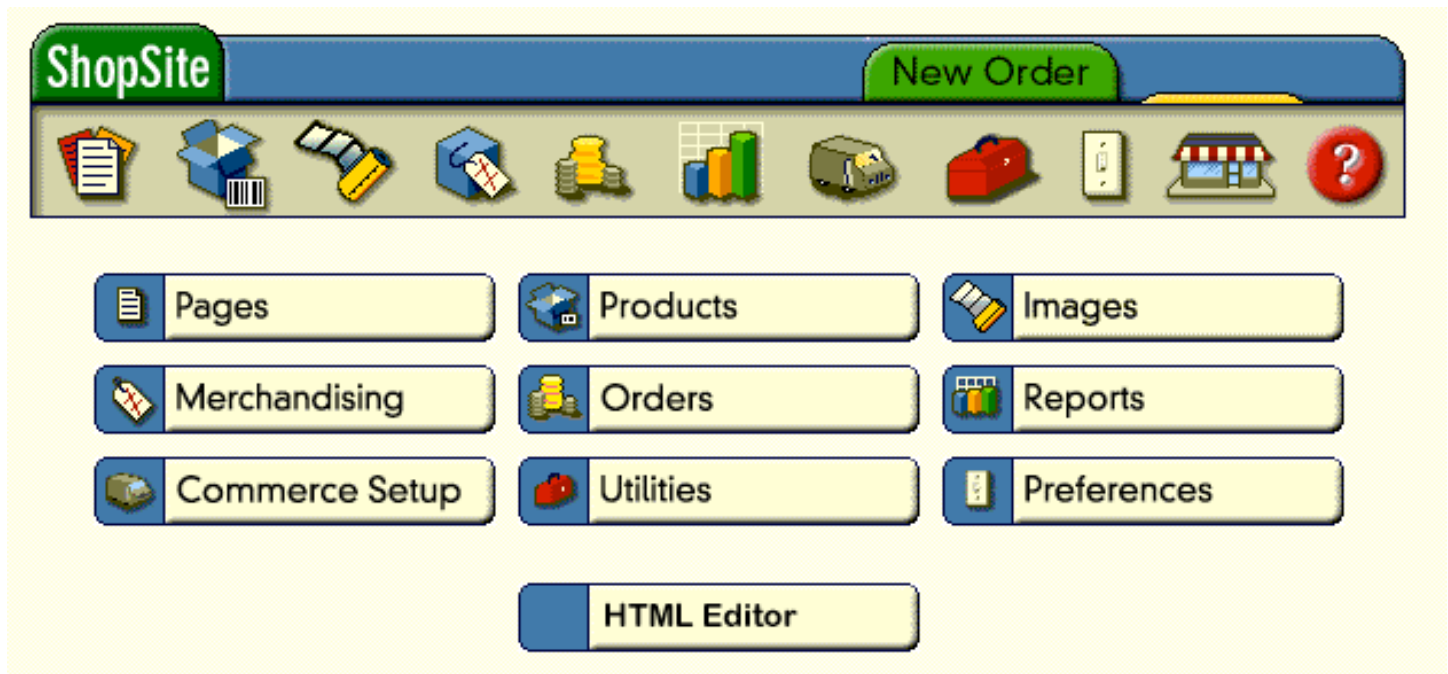
Monday, February 4, 2008

This Tech Note will lead you through the configuring of PIMS-X to work automatically with a ShopSite eCommerce WEB Site. This includes no less than automatically downloading Orders and uploading any modified Inventory records, since the last upload. There are also provisions for automatically Re-Publishing your Site content.

You will need a ShopSite Pro Server version 9 or better, or a ShopSite Pro being hosted by a company like Lexiconn or equivalent. For PIMS-X you will need the ExecUtron WEB Services Module, and access to this Module.

It is also assumed that you have at least a simple working knowledge of ShopSite Pro and PIMS-X. By no means do you need to be an expert in ShopSite or PIMS-X to use these functions. From this point, we will consider that you have a ShopSite Pro WEB Site up and running, even if it is not fully finished and only exists in it's most basic form...

To start with, you will need some basic information from your ShopSite Back-Office. You would access it from a URL such as <http://www.mysite.com/cgi-shopsite/bo/start.cgi>:

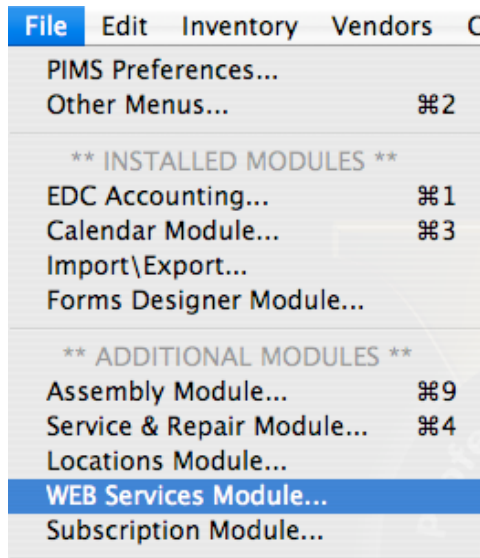


You now would like to click on "Preferences" to go to the "Store Preferences" page.

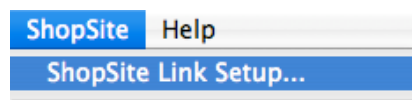


Now click on “Hosting Service”. This is where you will find settings that PIMS-X will need in order to establish a link between ShopSite and itself.

Now go to PIMS-X (we assume your on the same machine), and select “WEB Services Module...” from the main File menu.



From there, select the “ShopSite Link Setup...” function from the ShopSite menu.



The first thing you need to do in the “Access Parameters” section is enter your “**USER ID**” and “**PASSWORD**”. These would have been e-mailed to you by either your Hosting service or ShopSite themselves. The Password will be hidden unless you check the “Shop Password” checkbox.

API/FTP LOGIN INFORMATION:

USER ID:	<input type="text" value="pimsdemo"/>	AUTHORIZATION:	<input type="text" value="....."/>
PASSWORD:	<input type="password" value="....."/>		
	<input type="checkbox"/> Show Password		

Once both bits of information are entered, an “AUTHORIZATION” key is created for you. This is used as Basic Authentication every time PIMS-X talks with ShopSite Pro. These “logon pairs” will be used for all ShopSite functions including FTP file transfer. Make sure that your Hosting service uses the same User ID and Password for all functions, including all FTP access.

You will now need to enter the API CONNECTION PARAMETERS. This is used by PIMS-X to locate and control certain ShopSite functions.

API CONNECTION PARAMETERS:

CGI-BIN PATH:	<input type="text" value="cgi-pimsdemo/bo/"/>		
HOST ADDRESS:	<input type="text" value="shopsite.pimsx.com"/>	<input checked="" type="checkbox"/>	DOWNLOAD SECURE TRANSACTIONS

The “**CGI-BIN PATH**” is the location on you Site where PIMS-X will send its requests to. This can usually be found after the Host name in the “**Merchant CGIs URL**” field.

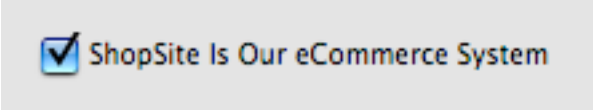
Store Settings

ID:	pimsdemo
Store URL:	http://shopsite.pimsx.com
ShopSite Images URL:	http://shopsite.pimsx.com/media
Merchant CGIs URL:	<input type="text" value="http://shopsite.pimsx.com/cgi-shopsite/bo"/>
Shopping Cart CGIs URL:	<input type="text" value="http://shopsite.pimsx.com/cgi-shopsite/sb"/>

In this case, the Host name is “shopsite.pimsx-com/” and the CGI-BIN PATH is “cgi-shopsite/bo/”.

If you are planning on download Orders securely (recommended), then be sure and check the “**DOWNLOAD SECURE TRANSACTIONS**” checkbox. This is the only way credit card information will be downloaded along with the Orders.

In order for PIMS-X to know that “ShopSite” is your preferred eCommerce link, you need to click the “ShopSite Is Our eCommerce System” checkbox.



Now click on the “Orders” TAB to configure Order downloading into PIMS-X. You will need to setup the “ORDER IMPORT PARAMETERS” information:

ORDER IMPORT PARAMETERS:

USE SHOPSITE FOR "Import Remote Text Order..." MENU

DEFAULT IMPORTED ORDERS TO BACKORDERED PAYMENTS WILL BE PROCESSED OFF-LINE

OPTIONAL DEPARTMENT CODE: [SHOPSITE WEB ORDERS](#)

AUTOMATICALLY DOWNLOAD ORDERS FROM SERVER DOWNLOAD EVERY:

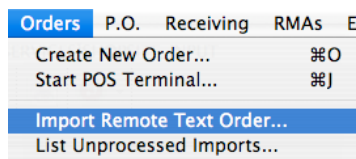
SHOW PROGRESS METER ON SERVER

PIMS-X PAYMENT TYPE FOR "Generic1":

PIMS-X PAYMENT TYPE FOR "Generic2":

LOOKUP CUSTOMERS BASED ON USER ID LOOKUP CUSTOMERS BASED ON E-MAIL

Checking **USE SHOPSITE FOR “Import Remote Text Order...” MENU** will cause PIMS-X to process the download Orders function when you select the “ **Import Remote Text Order...**” function from the main **Orders** menu.



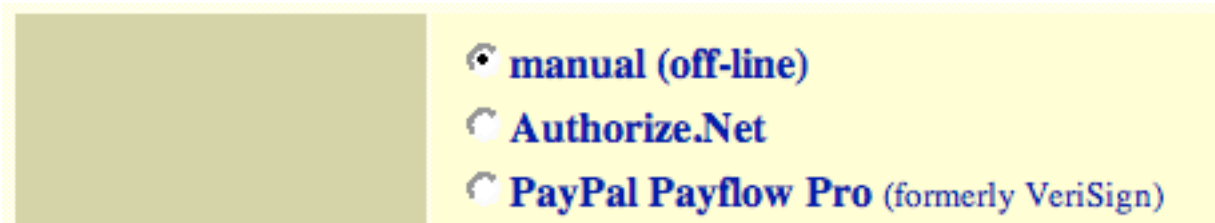
When not checked, PIMS-X will prompt you for a file on your disk instead (of a different format, not compatible with ShopSite).

DEFAULT IMPORTED ORDERS TO BACKORDERED:

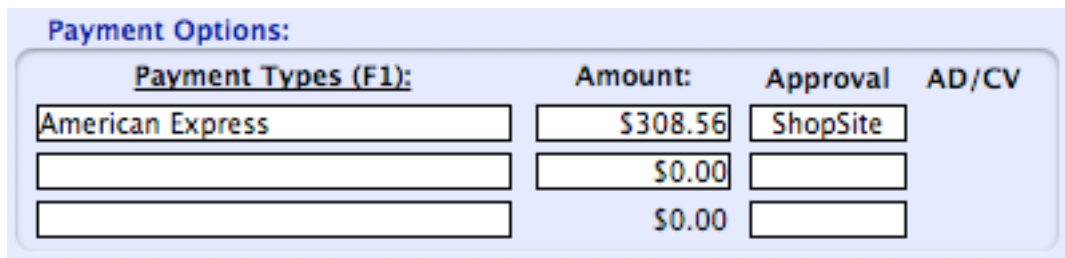
When checked, all imported Order line-items will be flagged as “Backordered”. This means that the SHP’D quantity will be set to zero and the BO’S quantity will be set to the Quantity ordered.

PAYMENTS WILL BE PROCESSED OFF-LINE:

When checked, this tells PIMS-X that ShopSite will not be processing any Payment Types. This corresponds to the ShopSite setup parameter found in “Commerce Setup”, “Payment” section, “Credit Card Processing” area called “**manual (off-line)**”.



If “**manual (off-line)**” is checked, then you must let PIMS-X know this. This will cause PIMS-X to require authorization on the imported Orders that have Payment Types that require it. If this is not checked, then PIMS-X will assume processing has already taken place and will put the word “ShopSite” in the PIMS-X Order screen Payment Type#1 “Approval” field.



This will yield the “Happy Face” and PIMS-X will require no further processing...

OPTIONAL DEPARTMENT CODE:

This field is where you can enter an optional PIMS-X Department Code. This will cause the Order import process to add this Department to all imported Orders from ShopSite. This is true even if a Department exists on an associated Customer or Employee record.

AUTOMATICALLY DOWNLOAD ORDERS FROM SERVER:

When checked, PIMS-X will attempt to download Orders from ShopSite automatically at an interval set by the “**DOWNLOAD EVERY**” field (in minutes). The minimum recommended interval is every 10 minutes.

PIMS-X will start its download from the **LAST ORDER NUMBER** it downloaded successfully, incremented by “1”. This means that if the last Order downloaded was “1240”, then the new downloads will start at ShopSite Order# “1241” onward. This function will only work on a Client/Server version of PIMS-X and not Single-User...

SHOW PROCESS METER ON SERVER:

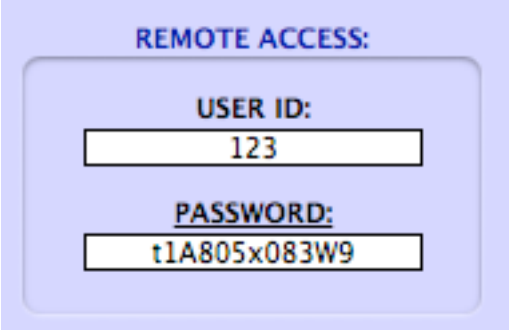
This will cause a process window to display on the PIMS-X Server machine when processing an Order download. It is recommended that this not be checked, unless you are trouble-shooting or otherwise need to know exactly when a download is taking place.

SHOPSITE GENERIC PAYMENT TYPE LINKING:

ShopSite allows you to define two different “Generic” Payment Types (Checkout Parameters). In PIMS-X you have the option of linking these Generic Payments to an existing PIMS-X Payment Type. To do this, simply select a PIMS-X Payment Type in either of the two fields provided (**PIMS-X PAYMENT TYPE FOR GENERICn**). Just click in the field provided to select a Payment Type to link to.

LOOKUP CUSTOMERS BASED ON USER ID:

If your ShopSite is configured to allow for Customer Login, then a “CUSTOMER ID” is downloaded along with the Orders. If checked, this option will cause PIMS-X to scan the Customer records for any Customer whose “CUST_USERID” (More Information TAB, Remote Access area) field equals the CUSTOMER ID returned by ShopSite.



REMOTE ACCESS:

USER ID:
123

PASSWORD:
t1A805x083W9

You have no control over how ShopSite assigns Customer IDs, so this field is used as apposed to the regular PIMS-X Customer Code field. Because of this, you need to make sure this PIMS-X field holds the correct ShopSite Customer ID for any PIMS-X Customers that require their Customer Code on Orders.

LOOKUP CUSTOMERS BASED ON E-MAIL:

If checked, this will cause PIMS-X to scan the Customer file for any Customer records that contain the “Bill-To” e-mail returned with the Order from ShopSite. If more than one record is found, then the most resent Customer record modified will be used to find a Customer Code to use on the imported Order. If a Customer Code already exists on the Order because it was found using the CUSTOMER ID, then the Customer Code is not replaced.

** If a Customer Code is loaded onto an Order being imported, it will not replace any BILL-TO or SHIP-TO Address information or any taxation or pricing on the imported Order...

HOW ORDERS ARE IMPORTED AND CREATED:

This is a short description of the process used to create an Order that is being imported into PIMS-X from ShopSite:

A new blank Order is first created in memory, and set to the Order Type “**Worksheet**”. A note is placed in the Order History denoting this creation along with other information.

The “REMOTE_ORDER_IMPORTED” flag is checked so that this new Order will be listed when selecting “**List Unprocessed Import...**” from the main **Orders** menu.

The next available Order Number from the PIMS-X system is used for the actual Order Number. The ShopSite Order Number is placed in the Order’s **Reference** field.

The Order Date is set to the Date returned by ShopSite for that Order. The Order Time is set to the current system time.

The ShopSite Transaction ID is placed into the Order History.

The complete BILL-TO information is imported. If a COMPANY is specified on the ShopSite Order, then the Customer Name is moved to the BILL-TO ATTN field and the Customer NAME is set to the Company name.

All Products found on the ShopSite Order are imported. During the import, if a match between the ShopSite SKU and PIMS-X PART_CODE fields is not found, then the PART_CODE field is blanked-out and the SKU from ShopSite is added above the Product Description. If the SKU exists in PIMS-X then all of the other supporting line-item information is loaded from the associated Inventory record, as though the Product were entered by hand. However, the Description brought over from ShopSite is always used regardless of what exists on the Inventory record. If so chosen, the Product is backordered.

When adding a line-item to the imported Order that contains “Customer Text” and/or “Options” from ShopSite for that item, that information is added to the Order line-item’s “User Memo” field. The same holds true for any “Gift Certificate” information for that line-item coming over from ShopSite.

If the Payment coming from ShopSite is “**CreditCard**”; then PIMS-X will scan the available PIMS-X Payment Types for any that match the “Issuer” coming from ShopSite (ie: VISA, MasterCard, etc.). If no such PIMS-X Payment Type record exists, it is added to the Payment Types file. This insures compatibility with Credit Cards used and ShopSite. The following Credit Card information is also brought over to the PIMS-X Order: “Card Number”, “Name On Card”, “Expiration Date”, and “AVS Response”. If the “PaymentGateway” from ShopSite does not return “offline”, then “ShopSite” is placed in the “Approval” field of the Order’s Payment Type#1.

If the Payment coming from ShopSite is “**Check**”; then PIMS-X will scan the available PIMS-X Payment Types for a match. If it does not exist, it is added to the Payment Types file. The “Routing Number” and “Account Number” are both placed in the Order History.

If the Payment coming from ShopSite is “**eCheck**”; then PIMS-X will scan the available PIMS-X Payment Types for a match. If it does not exist, it is added to the Payment Types file. The “Routing Number”, “Account Number”, “Bank Name”, and “Name On Account” are all placed in the Order History.

If the Payment coming from ShopSite is “**PurchaseOrder**”; then the Purchase Order number from ShopSite is placed in the Order’s Purchase Order field.

If the Payment coming from ShopSite is “**PayPal**”; then PIMS-X will scan the available PIMS-X Payment Types for a match. If it does not exist, it is added to the Payment Types file. The PayPal “Order Processing Info” is placed in the Order History.

If the Payment coming from ShopSite is “**WorldPay**”; then PIMS-X will scan the available PIMS-X Payment Types for a match. If it does not exist, it is added to the Payment Types file. The WorldPay “Order Processing Info” is placed in the Order History.

If the Payment coming from ShopSite is “**Generic1**”; then PIMS-X will check to see if a PIMS-X equivalent has been set in ShopSite Setup. If so, that PIMS-X Payment Type is substituted. If not, then PIMS-X will scan the available PIMS-X Payment Types for a “Generic1” match. If it does not exist, it is added to the Payment Types file. “Generic” fields 1 through 4 are then added to Order History, if they exist.

Payment “**Generic2**” is handled in the same fashion as “Generic1”...

If a “**Taxname**” is found on an Order coming from ShopSite, then it is used as the PIMS-X “Tax Jurisdiction”. If a Tax Jurisdiction of that name does not exist in PIMS-X, then it is added using the **Tax Rate** also found on that ShopSite Order.

If a “**Taxrate**” is found on an Order coming from ShopSite, then it is used as the default Tax Rate for the PIMS-X Order.

If “**TaxShipping**” is found on the ShopSite Order, then the “Tax Shipping Rate” on the associated Tax Jurisdiction record is set to this rate. If no Tax Jurisdiction for this Order exists, then Shipping is not taxed.

The “**Grand Total**”, “**Product Total**” (subtotal), and “**Tax Amount**” coming from ShopSite are added to the Order History. As these figures are automatically calculated on a PIMS-X Order, they are not imported into their respective fields in PIMS-X. They are only added to the Order History for reference purposes. The totals calculated by PIMS-X should always equal ShopSite.

If “**ShippingTotal**” is found on a ShopSite Order, then the “Total” is placed in the PIMS-X Order **Shipping** field and the “Description” is used as the Order’s **Shipper**”.

If a “**CustomerID**” is found on the ShopSite Order, then a Match is scanned for in PIMS-X based on the setting in the PIMS-X ShopSite Setup. This ID is also placed in the Order History, regardless of the setting.

If a “**Comments**” is found on the ShopSite Order, then it is added to the PIMS-X Order History.

If a “**Order Instructions**” is found on the ShopSite Order, then it is added to the PIMS-X Order History.

If a “**Order UTC**” is found on the ShopSite Order, then it is added to the PIMS-X Order History.

If a “**ip Host Name**” is found on the ShopSite Order, then it is added to the PIMS-X Order History.

If a valid PIMS-X Customer is linked to an Order, all other Customer information is loaded onto that imported Order. This includes assigned Rep, Department (unless an override exists in ShopSite setup), Resale Number, etc. Again, BILL-TO, SHIP-TO, and Credit Card info in note altered on the imported Order.

If the “Tax Rate” imported is zero, then the default rate from PIMS-X is loaded and the Order is set to “Tax Exempt”.

Once all Orders are imported, then the PIMS-X “**CONNECTION HISTORY**” is updated:

CONNECTION HISTORY:

LAST RUN: 02/04/2008 at 11:43 AM

LAST ORDER NUMBER: 1241 LAST ORDER DATE: 02/02/2008 - 02/03/2008

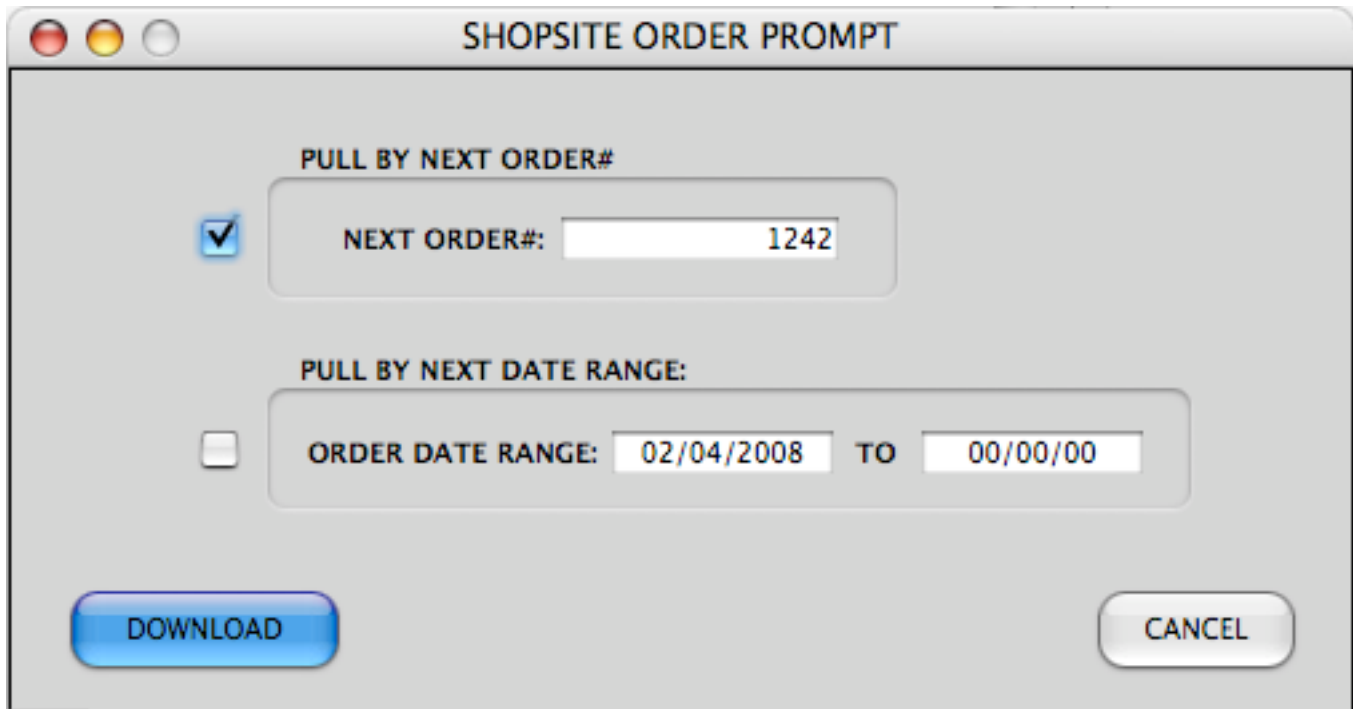
NUMBER OF ORDERS IMPORTED LAST: 0

LAST COMMAND SENT: version=8.3&startorder=1242&pay=yes

The most important bit of data is the “LAST ORDER NUMBER”. This is used to determine the next starting Order number for the next automatic Order download. In this example, the next starting Order number sent to ShopSite would be “1242”. If you ever need to change this number, click on the underlined text. Remember, PIMS-X uses this number and increments it by one and sends it to ShopSite to tell ShopSite what Order to start with when downloading to PIMS-X.

DOWNLOADING ORDERS MANUALLY:

If you wish to download Orders from ShopSite manually, you can select either “Import Remote Text Order...” from the main “Orders” menu or select “Download Orders...” from the WEB Services Module’s “ShopSite menu. Either way, you will be prompted for certain information before proceeding:



SHOPSITE ORDER PROMPT

PULL BY NEXT ORDER#

NEXT ORDER#: 1242

PULL BY NEXT DATE RANGE:

ORDER DATE RANGE: 02/04/2008 TO 00/00/00

DOWNLOAD CANCEL

You have two choices for selecting which Orders are manually downloaded from ShopSite.

The first is by **NEXT ORDER#**. This defaults to the Last Order Number downloaded successfully plus one. This is the same number used by the automated downloads. You can enter any number you like here.

The second choice is by **ORDER DATE RANGE**. This represents the Date Range to tell ShopSite to download all Orders from. The **Start Date** defaults to the last successful Order date from the last Order imported plus one day. The **End Date** always defaults to “00/00/00”. This tells ShopSite to download everything from the Start Date onward. You can change either of these dates to whatever you want.

The checkbox on the left side of these choices denotes which one to use. Duplicate Orders **WILL NEVER** be imported if they already exist in PIMS-X. Again, the ShopSite Order# is placed in the PIMS-X Order's Reference field. This is what is scanned for a match and possible rejection.

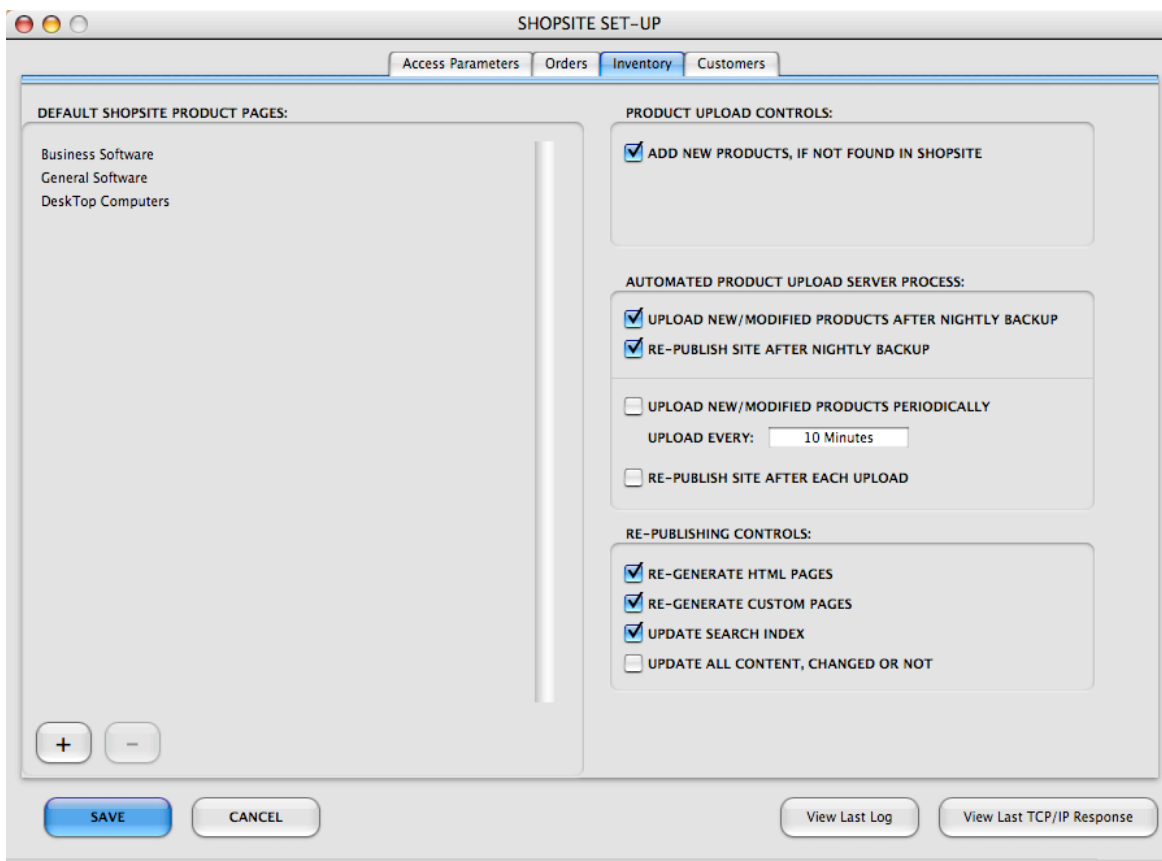
UPLOADING INVENTORY TO SHOPSITE:

When an Inventory record is created and/or modified in PIMS-X, the “WEB_READY_FOR_UPDATE” field is set to “True”. This only happens on Inventory previously flagged as “OK To Show On WEB”.

When Inventory is uploaded to ShopSite, the “WEB_READY_FOR_UPDATE” field is cleared (set to “False”). This way PIMS-X always knows what Inventory needs to be sent to ShopSite for updating.

PIMS-X updates Products in ShopSite by first creating a file made up of specific fields for all flagged Inventory. It then uploads a file to your ShopSite called “pimsx_upload.xml” using an FTP transfer protocol. Once the file is successfully uploaded, there is the option to have your ShopSite pages “Published”. This will update all “static” pages to reflect the changes in Products.

All of this can be handled automatically or manually. Before Products can be uploaded to ShopSite, settings need to be adjusted and parameters need to be set. To do this, go to the WEB Services Module and select “ShopSite Link Setup...” from the ShopSite menu. Now click on the **Inventory** TAB:



This is where you tell PIMS-X how to handle and prepare Product uploads to ShopSite.

The basic choices available have to do with how often you would like your Products updated on ShopSite and whether or not to “Re-Publish” your Site. As “Re-Publishing” can be time consuming and might affect the performance of your WEB Site while running, you might think about how often you really need to update and Re-Publish.

The following controls how this all takes place:

You have two choices when it comes to automatically updating Products.

1. Every so-many minutes.
2. After the Server performs its nightly backup.

You can only choose one method.

To choose the “after backup” method, check the checkbox called “**UPLOAD NEW/MODIFIED PRODUCTS AFTER NIGHTLY BACKUP**”. This will cause PIMS-X to scan for any Inventory records that need to be uploaded, and upload them after the Backup system has finished backing up the Datafile. This works on a PIMS-X Server only, and not a Single-User version. You also have the option of “Re-Publishing” your Site after the upload is complete. This is accomplished by checking the checkbox “**RE-PUBLISH SITE AFTER NIGHTLY BACKUP**”.

To update Products every so often as needed, check the checkbox “**UPLOAD NEW/MODIFIED PRODUCTS PERIODICALLY**”. If this is checked, you must also enter an upload interval in the field called “**UPLOAD EVERY:**”. This is in minutes, with a minimum of 10 minutes. An option exists here too for the automatic re-publishing of your Site. To re-publish after successfully uploading Products, check the checkbox “**RE-PUBLISH SITE AFTER EACH UPLOAD**”.

** A good method might be to combine the two methods, as related to “Re-Publishing”. This can be done by Setting PIMS-X to upload every 10 minutes, and then telling it to “Re-Publish” after the Nightly Backup...

Of course, you can always go to your ShopSite Back-Office and manually “Publish” at any time.

ADD NEW PRODUCTS, IF NOT FOUND IN SHOPSITE:

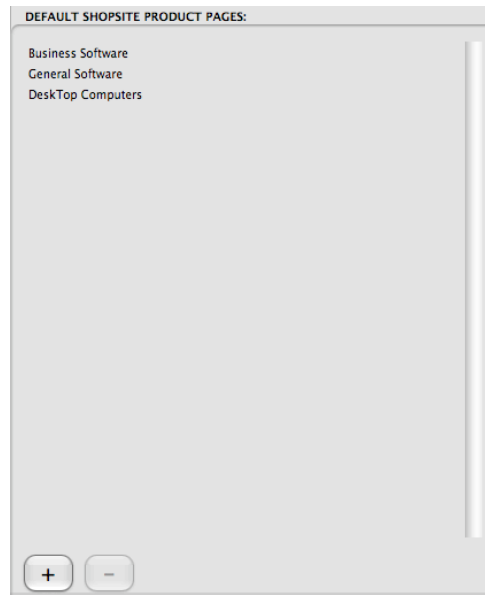
If this option is checked, then any Products that don’t already exist in ShopSite will be added as part of the upload process. If left unchecked, these “new” Products will be skipped and all others will be updated.

RE-PUBLISHING CONTROLS:

These are for advanced Users, and should be left as-is. If you need to and know what you’re doing, feel free to change these settings. As a default, all should be checked except for “**UPDATE ALL CONTENT, CHANGED OR NOT**”. This one defaults to unchecked. If checked PIMS-X will instruct ShopSite to re-publish all of your pages, regardless of whether or not the Products on their pages have been altered/updated.

DEFAULT SHOPSITE PRODUCT PAGES:

This is a Sublisting where you can enter the names of the default ShopSite Product Pages. These names are used throughout PIMS-X to assign different Inventory records to various ShopSite pages.

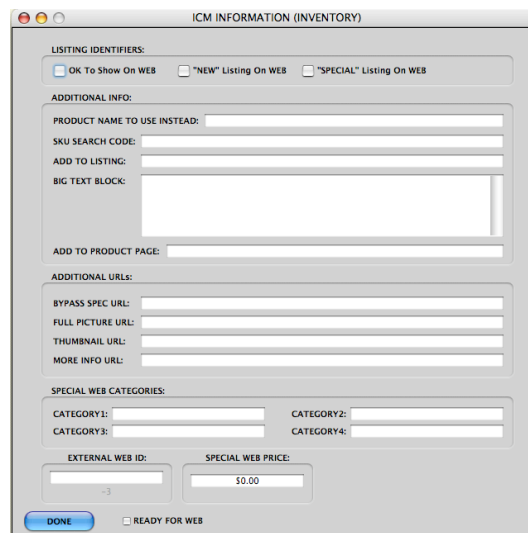


Simply click the “+” button to add a Product Page name, and the “-“ to remove one.

MAKING SURE INVENTORY RECORDS ARE SET-UP CORRECTLY:

There are only a few things needed to make sure your Inventory is ready for ShopSite.

At the top of every Inventory record is a menu called “**WEB**”. Under that menu is a function called “**Additional Data For WEB...**”. When selected, the “**ICM Information Screen**” is displayed:



The only required field is the “**OK To Show On WEB**” checkbox. This tells PIMS-X that this Product is designated to be part of the ShopSite Products.

These are other fields optionally used by ShopSite:

PRODUCT NAME TO USE INSTEAD:

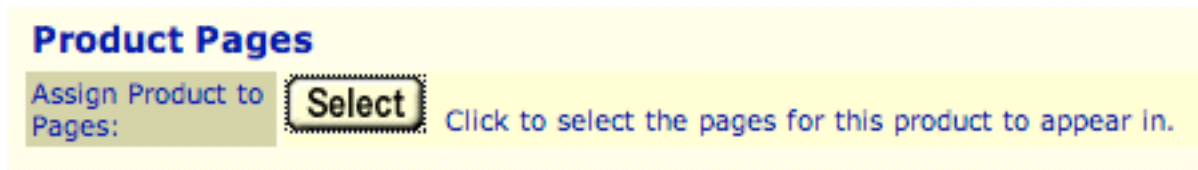
If this field has something in it, that text will be used for the ShopSite Product Name and not the regular Product Name.

BIG TEXT BLOCK:

Any text in this field will be used as “More Info” in ShopSite.

ADD TO PRODUCT PAGE:

This represents the Product Page(s) this Product is to be assigned to on your ShopSite WEB Site. It corresponds to the “**Assign Product Pages**” section of the ShopSite Back-Office:



You can click on the underlined text to the left of the field to pick from the “Default ShopSite Product Pages” you entered in the PIMS-X ShopSite Setup section. Multiple pages can be entered, as long as they are separated by the pipe character (“|”).

SPECIAL WEB CATEGORIES:

These four fields are added to the ShopSite Product Keywords field, if they exist.

SPECIAL WEB PRICE:

If this price is not zero, it is used as the Primary Price in ShopSite and not the Inventory records normal PRICE field.

EXTERNAL WEB ID:

This is mostly for future use and represents the **PRODUCT ID** field found in ShopSite when it adds a new product.

The following is a complete list of the Inventory field structure currently uploaded to ShopSite:

- **PRODUCT NAME** (or **PRODUCT NAME TO USE INSTEAD** if available)
- **PART CODE** (SKU on ShopSite)
- **PRICE** (or **SPECIAL WEB PRICE** if available)
- **NON-TAXABLE** (if unchecked, the ShopSite “Taxable” field is set to “checked”, else it’s Null)
- **WEIGHT** (rounded up to next whole number, with a minimum of “1”)
- **ON-HAND** (this is the “Total On-Hand” of all Locations, placed in the ShopSite “Quantity On Hand”)

- **INVENTORY “KEYWORDS”** (all the Inventory Keywords plus all WEB Category fields)
- **PRODUCT DESCRIPTION** (placed in the ShopSite Product Description field)
- **WEB PRODUCT PAGES** (from the PIMS-X “Add To Product Page” field)
- **BIG TEXT BLOCK** (placed in the ShopSite “More Information” field for this Product)

All other fields in the ShopSite database are left untouched from their original state. You can go directly into the Product Data in ShopSite to further add to the “Product Info” page. Any fields not listed above will not be altered by a PIMS-X upload.

TOOLS FOR MANUALLY MANIPULATING WEB INVENTORY:

Throughout PIMS-X, there are several functions to aid you in maintaining your WEB Inventory. Here is a list of them:

INVENTORY ENTRY SCREEN:

“**Additional Data For WEB...**” function found under the **WEB** menu.

MAIN INVENTORY MENU:

“**List Ready For WEB Update...**” function. This will list all Inventory records currently flagged for upload.

“**List OK To Show On WEB...**” function. This will list all Inventory flagged as “OK To Show On WEB”.

WEB MENU AT TOP OF INVENTORY LISTING:

“**Set “OK For WEB Flag...**” function. This will flag the selected Inventory records as “OK To Show On WEB”.

“**Set Ready To Send Flag...**” function. This will prompt the User to set or unset the Ready For Upload flag on the selected Inventory records.

“**Globally Apply Product Pages...**” function. This function will allow you to globally apply a Product Page to the selected Inventory records.

“**Upload Selected Inventory...**” function. This will upload the selected Inventory records to ShopSite. It will do so regardless of whether or not the records as flagged to do so.

END OF TECH NOTE

ADDENDUM – 1

Friday, February 22, 2008

As of PIMS-X version 10.0.5.1, there have been some additional controls added to the ShopSite setup:

** The **FULL PICTURE URL** from the Inventory record's WEB section is now uploaded to ShopSite. It should be entered exactly the same way you would enter it in ShopSite Pro Back-Office.

** The “&” character is removed from all text being uploaded to ShopSite. It is replaced with the word “and”.

The following have been added to the “ShopSite Link Setup”, “Inventory” TAB:

DON'T UPLOAD “BIG TEXT BLOCK:

If checked, this will keep the Product Upload process from uploading the text found in the **BIG TEXT BLOCK** section of the Inventory record's WEB section.

BIG TEXT BLOCK:	This product will not work under water, or other fluids...
------------------------	--

DON'T UPLOAD PRODUCT PAGES:

If checked, this will keep the “Product Pages” you have designated in the **ADD TO PRODUCT PAGE** section of the Inventory record's WEB section from being uploaded.

ADD TO PRODUCT PAGE:	DeskTop Computers General Software Business Software
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DON'T UPLOAD IMAGE URLs:

If checked, this will keep the URL entered in the **FULL PICTURE URL** from being uploaded.

FULL PICTURE URL:	http://images.apple.com/home/2008/images/promo_nanoflowers20080123.jpg
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REMOVE EMBEDDED HTML TAGS:

If checked, any text that starts with a “<” character and ends with a “>” character will be removed from the following Inventory fields before uploading:

- WEB_NAME_TO_USE
- KEYWORDS
- WWW_TEXTBLOCK (Big Text Block)
- PRODUCT_NAME
- DESCRIPTION

SET UPLOADED PRICE TO CUSTOMER PRICE CODE:

Normally the Product Upload Process in PIMS-X will upload the Inventory PRICE field, unless a WEB-Only Price is specified. However if there is a valid Customer PRICE CODE entered into this field, then the Price is calculated using that Price Code and that resulting Price is uploaded instead. It uses a Quantity of "1" and the Current Date when calculating the Price using a specified Price Code. This is the same Price that would be returned if entering this Product on an Order with that Price Code. The thought behind this is to facilitate pricing for specific Sites that might be for "Wholesale" Customers only, or the like...

ISOLATE THESE "Custom_Alpha9" RECORDS ONLY:

Each Inventory record in PIMS-X has several "Custom" User fields available (Forms Designer, Customer User Screens). One of these fields is "Custom_Alpha9". This is an indexed, 80 character text field. You can put anything you like into this field (printable characters only). With this corresponding field in the PIMS-X ShopSite Setup, you can put some text to use as a search to further narrow the "OK For WEB", "Ready To Upload" Inventory. For instance, if you had the word "Wholesale" in the field "Custom_Alpha9" on certain Inventory records in PIMS-X and the word "Wholesale" in the ShopSite Link Setup in PIMS-X, then only those Inventory records would be sent out of those that are designed to be uploaded. The main reason for this is to allow for more than one Data-Sync'd PIMS-X Inventory record to upload different Products to different ShopSites.

NOTE ABOUT MULTIPLE SHOPSITES AND PIMS-X:

The current ShopSite Pro versions 9.x.x make it a bit difficult to have multiple pricing based on Customer type/group. This often requires ShopSite users to purchase "Mirrored" ShopSites to offer different pricing for different groups of Customers (ie: Retail/Wholesale). The problem is that the current PIMS-X only communicates with one ShopSite at a time...

To get around this problem, a Single-User PIMS-X can be "Data-Sync'd" to a "Main" PIMS-X system. This would cause them to have basically the same Datafiles. However, each system could have its own ShopSite Link Settings. This coupled with a few new setting options in PIMS-X version 10.0.5.1 would allow for different Prices and Inventory to be uploaded to each Site. The Data-Sync process between the two PIMS-X systems would allow new/modified Inventory to be sent to the second Single-User PIMS-X system and inversely any Orders downloaded by the Single-User PIMS-X would be transferred to the Main PIMS-X system. This solves the multiple ShopSite dilemma...

ADDENDUM – 2

Friday, February 25, 2008

As of PIMS-X version 10.0.5.2, there have been some additional controls added to the ShopSite setup:

It is now possible to upload Inventory “Custom_Alpha” fields one through eight to ShopSite Pro. These correspond to ShopSite fields “Extra Fields – Product Field n...”:

Extra Fields

Extra fields for use with Custom Templates/Froogle/Order API. ([Extra Field Setup](#))

(Product Field 1):

Simply check the checkbox of the “Custom_Alpha” field(s) you wish to upload during a Product upload session:

<input checked="" type="checkbox"/> SEND CUSTOM ALPHA1	<input checked="" type="checkbox"/> SEND CUSTOM ALPHA5
<input checked="" type="checkbox"/> SEND CUSTOM ALPHA2	<input checked="" type="checkbox"/> SEND CUSTOM ALPHA6
<input checked="" type="checkbox"/> SEND CUSTOM ALPHA3	<input checked="" type="checkbox"/> SEND CUSTOM ALPHA7
<input checked="" type="checkbox"/> SEND CUSTOM ALPHA4	<input checked="" type="checkbox"/> SEND CUSTOM ALPHA8

ADDENDUM – 3

Thursday, March 18, 2008

As of PIMS-X version 10.0.5.4, there have been some additional controls added to the ShopSite setup:

It is now possible to upload PIMS-X Inventory “Tier Pricing” to the ShopSite product “Price Breaks” area.

FROM	TO	DISCOUNT	PR
5	9	10.0% / /	<input checked="" type="checkbox"/> Discount Off
10	19	20.0% / /	<input checked="" type="checkbox"/> Discount Off
20	29	30.0% / /	<input checked="" type="checkbox"/> Discount Off
30	999	40.0% / /	<input checked="" type="checkbox"/> Discount Off

PIMS-X, Inventory Record

Check here to turn on Quantity Pricing

Number of Price Breaks:

Starting Quantity*	Price/Unit	On Sale Price/Unit
1	\$ 100.00	\$ 100.00
5	\$ 90.00	\$ 90.00
10	\$ 80.00	\$ 80.00
20	\$ 70.00	\$ 70.00
30	\$ 60.00	\$ 60.00

Quantity Pricing:

* Quantities may not display if they are below the 'Minimum Quantity'

ShopSite Back-Office (Edit Product Info)

ShopSite’s “**Starting Quantity**” will always equal the PIMS-X “**FROM**” field. If the first Tier Pricing “**FROM**” quantity is greater than “1” then an additional Price Break starting with the ShopSite default of “1” will be added first, with the Inventory items regular Price used.

If you don’t want any PIMS-X Tier Pricing to be uploaded as Price Breaks to ShopSite, then check the checkbox called “**DON’T UPLOAD TIER PRICING**” in the PIMS-X ShopSite Preferences (Inventory TAB).

There has also been a change in the “WEB Information” page on the Inventory entry screen:

The screenshot shows a window titled "WEB INFORMATION (INVENTORY)" with a sub-header "Paris Works1". It has two tabs: "ShopSite Specific" (selected) and "ICM".

At the top right, there are two checked checkboxes: "OK To Show On WEB" and "READY FOR WEB".

ADDITIONAL INFO:

PRODUCT NAME TO USE INSTEAD: ParisWorks For The WEB

MORE INFO TEXT: Even the power cord is a feature.
The MacBook Pro power adapter with MagSafe connector is a magnetic connection instead of a physical one. So, if you happen to trip over the power cord, you won't send MacBook Pro flying. The cord simply disconnects, without damage to either the cord or the notebook.

ADD TO PRODUCT PAGE: Business Software|General Software

ADDITIONAL URLS:

PRODUCT IMAGE: http://images.apple.com/home/2008/images/promo_macbookpro_20080306.jpg

MORE INFO IMAGE: http://images.apple.com/macbookpro/images/features_desktop20080228.png

SPECIAL WEB CATEGORIES:

CATEGORY1: SOFTWARE CATEGORY2: PROGRAM
CATEGORY3: BUSINESS CATEGORY4: VERY COOL

EXTERNAL WEB ID: 30 SPECIAL WEB PRICE: \$123.45

A "DONE" button is located at the bottom right.

This screen is now divided into the “**ShopSite Specific**” and “**ICM**” pages. You will be dealing with the “**ShopSite Specific**” page (default).

There are a couple of additions to this page. Now when you click on the text “**MORE INFO TEXT**” (underlined), you can edit the text in a larger “Get” dialogbox. There is also the addition of the “**MORE INFO IMAGE**” URL field. This is where you can enter the full URL or local image name of the graphic that is used on the ShopSite “More Info Page”. If the “Don’t Upload Image URLs” checkbox is checked in ShopSite Preferences (PIMS-X), then this image URL is not uploaded.

CROSS-SELL AND INVENTORY AUTO-LOADS:

PIMS-X now has the capability to upload your Inventory “**Auto-Loads**” to ShopSite Pro as “**Cross-Sell**” Products.

PART CODE	QTY	PRODUCT NAME	DISCOUNT
DC	1	Dim City Game	
1mbsimm	1	1 MB Simm Ram (Plumb Series)	

(Auto-Loads Sublisting On Inventory Entry Screen)

Cross Sell

Cross Sell Products:

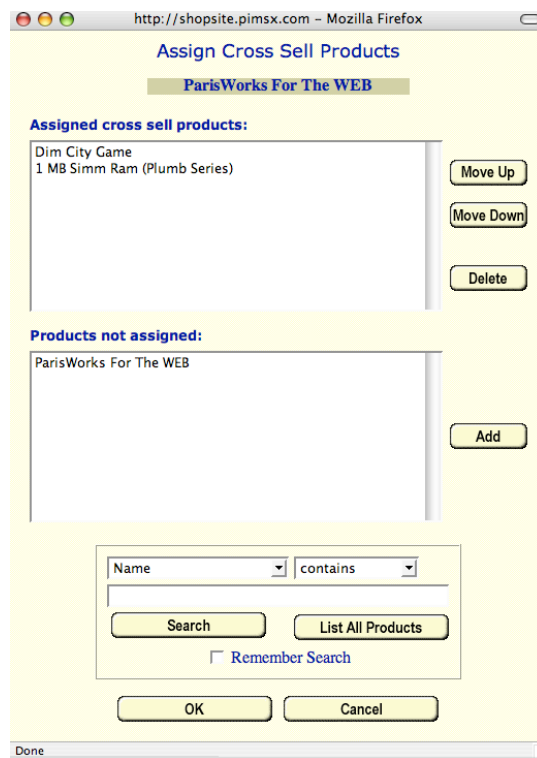
2

Assigned

Select

Click to select the products to assign as cross sell items.

(ShopSite Pro v9.0 Cross Sell Products – Back Office)



(Products In ShopSite, Displayed By Clicking SELECT Button)

To keep “Auto-Loads” from being uploaded to ShopSite Pro, simply click the checkbox called “**DON'T UPLOAD CROSS-SELL ITEMS (ASSO. AUTOLOADS)**”, found in the PIMS-X ShopSite Preferences (Inventory TAB).

ADDENDUM – 4

Thursday, April 16, 2008

As of PIMS-X version 10.0.5.6, ShopSite Pro “Coupons” and “Discounts” are now processed. ShopSite Pro has a unique method of applying standard Order Discounts and discount Coupons. They generally apply to the entire Order. This can be somewhat problematic when both “Taxable” and “Non-Taxable” items exist on the same WEB Order...

PIMS-X handles these discounts in one of two ways:

The first way is to map a ShopSite Coupon to a corresponding PIMS-X Inventory record. When a Coupon is encountered, it is entered as a Product on the PIMS-X Order with a negative dollar amount (Price). To set-up Coupon mapping, go to the Inventory TAB of the ShopSite Set-Up.

COUPON TRANSLATIONS:

COUPON:	Free Shipping
PART#:	SSFS
ShopSite Free Shipping Coupon	
COUPON:	
PART#:	
COUPON:	
PART#:	
COUPON:	
PART#:	
COUPON:	
PART#:	
COUPON:	
PART#:	
COUPON:	
PART#:	

+ - Roll Back Prices To Match Subtotal

From there, you can enter a Coupon Name (exactly as entered into ShopSite Pro) and assign it to an existing PIMS-X Inventory record (click on **PART#** to choose Inventory record).

Again, make sure it matches the “Coupon Name:” as stated in ShopSite Pro:

ShopSite
New Order

Add a Coupon

Coupon Name:	<input type="text" value="Free Shipping"/>
Expires:	<div style="display: flex; gap: 5px;"> Apr 17 2010 12 : 37 pm </div> <small>Server time: Apr 17 2008 at 12:37 pm</small>
One Time Use:	<input type="radio"/> No <input checked="" type="radio"/> Yes
Valid For:	<input checked="" type="radio"/> Entire order <input type="radio"/> Specific products: <input type="button" value="Select"/> <input type="checkbox"/> Allow only 1 product per redeemed coupon
Discount Type:	<input type="radio"/> <input type="text" value="0"/> % <input type="radio"/> \$ <input type="text" value="0.00"/> <input checked="" type="radio"/> Free Shipping
Minimum Cart Value:	<input checked="" type="radio"/> Currency: \$ <input type="text" value="0.00"/> <input type="radio"/> Units: <input type="text" value="0"/>
Return-to-store page (full URL):	<input type="text" value="http://shopsite.pimsx.com/index.html"/>
Alternate Code:	<input type="text"/>

Using Coupon Mapping will work, but can also lead to instances where a ShopSite Pro Order total will not match a PIMS-X Order total. This can happen on mixed taxation Orders coming from ShopSite Pro (Taxable and Non-Taxable on same Order). Because of this, there is a second method for insuring ShopSite Pro discounts are booked properly.

If you check the checkbox called “**Roll Back Prices To Match Subtotal**”, then PIMS-X will adjust all of the item’s Prices on a ShopSite Pro Order when imported to match the “Product Totals” of the original ShopSite Pro Order.

Roll Back Prices To Match Subtotal

This has two major benefits. One is that the totals in PIMS-X will match the totals of the ShopSite Pro Order. The other is the fact that if a Customer wants to return an item from a discounted Order, you will see what they actually paid for that item and refund/exchange it accordingly. For that reason along, “Entire Order” discounting is not a good practise. However, PIMS-X compensates for this. This is the recommended method, as you can not do Coupon Mapping and Price Rollback at the same time...