

PIMS-Platinum - ShopSite Pro Integration

PIMS-Platinum v17.1.1.6 Or Greater
ShopSite Pro v14.0 Or Greater (Hosted Through Lexiconn)
Revision 3

This Tech Note will lead you through the configuring of PIMS-Platinum and the ShopSite Pro eCommerce solution. This includes no less than uploading specific modified Inventory to ShopSite as well as downloading Orders into PIMS.

You will need a basic understanding of PIMS, and a ShopSite Pro solution hosted by Lexiconn (<https://www.lexiconn.com>).

PLEASE NOTE: *ExecUtron does not receive any compensation or promotion from Lexiconn. We just like solutions that work! Everything we are about to show you assumes you are hosted through Lexiconn...*

When you purchase and set-up your Lexiconn ShopSite account, be sure and have them load and configure their "OAuth Module" for your ShopSite. This will allow you to use the newer connection protocols for better security.

<https://www.lexiconn.com/ecommerce/shopsite/oauth-bridge-module.html>

You will also need the PIMS "WEB Services Module". This can be purchased through your PIMS Reseller.

From this point on, we will assume you have a ShopSite Pro account running at Lexiconn.

PLEASE NOTE: *It is not in the scope of this document to tell you how to setup your ShopSite. They have their own documentation and videos for that. Our goal with this document is to help you connect PIMS to ShopSite in the most automated way possible. Nothing more.*

To start with, you'll need to get some information from your ShopSite Back Office. The Back Office is your ShopSite settings and configuration WEB site. We have a test site called www.shoppersvillage.com. Our Back Office is found at <https://www.shoppersvillage.com/cgi-shoppersvillage/bo/start.cgi>, as an example. Yours will differ, but be similar.

When you setup an account with Lexiconn, they will e-mail you some configuration data. You'll need this as well.

Let's go to the WEB Services Module, to the ShopSite link configuration screens. To do this, select "**WEB Services Module...**" from the main PIMS "**File**" menu. Now select the "**ShopSite Link Setup...**" function from the "**ShopSite**" menu.

This will take you to the setting pages for the configuration of the PIMS ShopSite settings.

SHOPSITE SET-UP

Access Parameters Orders Inventory Customers Other Sites

☒ ShopSite Is Our eCommerce System ☐ Put In Diagnostic Mode

HOSTING SERVICE PARAMETERS:

USER ID: shoppersvillage PASSWORD: xxxxxxx STORE DOMAIN: www.shoppersvillage.com STORE ID: shoppersvillage
ie: www.shoppersvillage.com ie: shoppersvillage

API CONNECTION PARAMETERS:

MERCHANT CGIs URL: https://www.shoppersvillage.com/cgi-shoppersvillage/bo
BRIDGE CGIs URL: https://www.shoppersvillage.com/cgi-shoppersvillage/LexAuth Test
OAUTH URL:

CURRENT SHOPSITE VERSION YOU'RE USING:

ACTIVE VERSION: 14.0

☐ Legacy Mode (not compatible with v14.x)
☒ Lexiconn "Bridge" Module Compliant
☐ ShopSite OAuth Log-In Method

Notes

FTP PARAMETERS:

FTP USER ID: shoppersvillage Test
FTP PASSWORD: xxxxxxx

FTP DESTINATION FOLDER: www
FTP FILE NAME: pimsx_upload.xml

SAVE CANCEL

You'll need some of the information that Lexiconn sent you. In an e-mail, it will look something like this:

```
The latest ShopSite v14 has been installed.

---
FTP/SSH access:
---
domain/hostname: shoppersvillage.com
IP address: 69.39.228.254
username: shoppersvillage
password: xxxxx

---
ShopSite access
---
https://www.shoppersvillage.com/cgi-shoppersvillage/bo/start.cgi
User ID: shoppersvillage
Password: xxxxxx
Store ID: shoppersvillage
```

Obviously, your Passwords will not be hidden...

Make sure the “**Lexiconn ‘Bridge’ Module Compliant**” checkbox is checked. This will display the proper fields to use for setup. Also make sure your “**ACTIVE VERSION**” is set to “**14.0**”.

Now fill in the following “**HOSTING SERVICE PARAMETERS**” fields from the data sent you:

USER ID

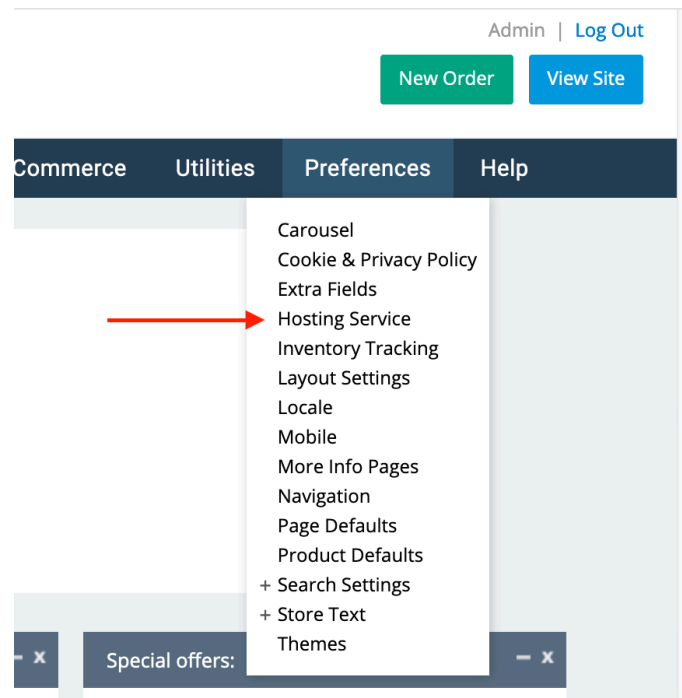
PASSWORD

STORE DOMAIN (or IP address if you don’t have one)

STORE ID

You now need to go to the ShopSite Back Office to find the “**MERCHANT CGIs URL**”. As of this writing, do this:

Once in the ShopSite Back Office, select “**Hosting Service**” from the “**Preferences**” menu:



Scroll down in your browser until you see the “**STORE SETTINGS**” area:

Store Settings	
ID	shoppersvillage
Store URL	http://www.shoppersvillage.com
Make Store URL secure. <input type="checkbox"/> Use SSL/TLS security in ShopSite Generated Pages and the order screen <button>Test URL</button>	
ShopSite Images URL	http://www.shoppersvillage.com/media
Merchant CGIs URL	<input type="text" value="http://www.shoppersvillage.com/cgi-shoppersvillage/bo"/>
Shopping Cart CGIs URL	<input type="text" value="http://www.shoppersvillage.com/cgi-shoppersvillage/sb"/>

Now copy the “**Merchant CGIs URL**” and paste it into the same field in PIMS:

API CONNECTION PARAMETERS:	
MERCHANT CGIs URL:	<input type="text" value="https://www.shoppersvillage.com/cgi-shoppersvillage/bo"/> ←
BRIDGE CGIs URL:	<input type="text" value="https://www.shoppersvillage.com/cgi-shoppersvillage/LexAuth"/> Test
OAUTH URL:	

If the URL does not start with “HTTPS”, then correct it to say so. After pasting/entering this data, PIMS will automatically enter the “**BRIDGE CGIs URL**” for you. Basically it’s the same as the other URL, except the “/bo” is replaced with “/LexAuth”. If this doesn’t happen automatically for some reason, then change it manually.

You can now click the “Test” button. If it works, you’ll see a “Success” dialog displayed:



If not, you'll see the error described:

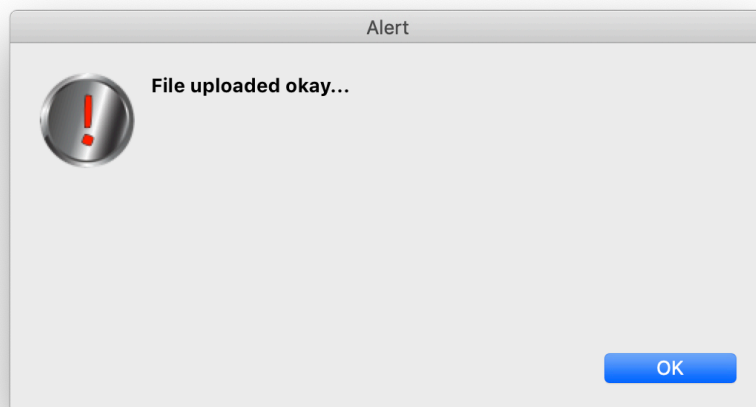


What you just setup are the default PIMS parameters to communicate with ShopSite's APIs (to tell ShopSite what to do). PIMS now has control of your ShopSite for data transfers.

It's now time to setup the part of PIMS that will transfer Inventory to ShopSite. This process involves PIMS exporting a special file (XML) of Inventory records to disk, and then transferring it (FTP) to ShopSite. Once there, PIMS will send an instruction to ShopSite telling it to import and process that file. How and what is exported will be covered in a bit.

To make this happen, you need to fill in the "**FTP PARAMTETERS**". (*"FTP" stands for "File Transfer Protocol", and is the standard for moving files around on the Internet.*)

Use the information you received from Lexiconn (FTP/SSH access) to enter the "**FTP USER ID**" and "**FTP PASSWORD**". Once entered, you can click the "**Test**" button. This will upload a test file to your ShopSite. It's just a test, and won't affect your site. If it works, you'll see this:



If not, you should see something like this:



There are two other bits of information in this section that you need to enter:

FTP DESTINATION FOLDER FTP FILE NAME

When you first set this up, the Destination Folder will default to “www”. If you are pointing a Domain to ShopSite (in this case we are: “www.shoppersvillage.com”) or just an IP Address, then “www” is what you want. If you’re pointing a sub-domain to ShopSite (ie: “www.executron.com/store”), then you would enter “www/store” in this field. The “**Test**” button will let you know if you have it setup properly or not. You can also check with an FTP Client app (like “Fetch”) to see exactly where the test file is going. The name of the file sent will match the name in the “**FTP FILE NAME**” field. It will simply contain the word “Test”.

Speaking of the “**FTP FILE NAME**” field, this is the name of the file that is uploaded to ShopSite. It’s best just to leave it to the default name.

To activate this link in PIMS, make sure the “**ShopSite Is Our eCommerce System**” checkbox is checked. However, there’s more settings to go before this will work...

CONFIGURING INVENTORY UPLOADS:

The next step we’ll cover is the configuring of your system to upload Inventory data to ShopSite. This will involve both the PIMS ShopSite settings as well as configuring your Inventory records.

While still in the **ShopSite Set-Up**, click on the “**Inventory**” tab.

This will display the initial ShopSite Settings for Inventory uploading from PIMS:

The screenshot shows the 'SHOPSITE SET-UP' window with the 'Inventory' tab selected. The window is divided into several sections:

- DEFAULT SHOPSITE PRODUCT PAGES:** A list box containing 'Shoppers Village Products'. Below it are buttons for '+', '-', 'Export', 'Sort', and 'Find'.
- PRODUCT UPLOAD CONTROLS:** A list of checkboxes:
 - ☒ ADD NEW PRODUCTS, IF NOT FOUND IN SHOPSITE
 - ☐ DON'T UPLOAD "BIG TEXT BLOCK"
 - ☐ DON'T UPLOAD PRODUCT PAGES
 - ☐ DON'T UPLOAD IMAGE URLS
 - ☐ REMOVE EMBEDDED HTML TAGS
 - ☐ DON'T UPLOAD TIER PRICING
 - ☐ DON'T UPLOAD CROSS-SELL ITEMS (ASSO. AUTOLOADS)
 - ☒ APPLY CHARACTER DATA ENCODING TO "TEXT" FIELDS "<![CDATA[...]]>"
 - ☐ DON'T UPLOAD PRODUCT DESCRIPTION FIELD
 - ☒ REMOVE 'VENDOR' FROM KEYWORDSA text field 'SET UPLOADED PRICE TO CUSTOMER PRICE CODE:' is followed by a 'Custom Field Mapping' button.
- RE-PUBLISHING CONTROLS:** A list of checkboxes:
 - ☒ RE-GENERATE HTML PAGES
 - ☒ RE-GENERATE CUSTOM PAGES
 - ☒ UPDATE SEARCH INDEX
 - ☐ UPDATE ALL CONTENT, CHANGED OR NOT
- AUTOMATED PRODUCT UPLOAD SERVER PROCESS:** A list of checkboxes:
 - ☐ UPLOAD NEW/MODIFIED PRODUCTS AFTER NIGHTLY BACKUP
 - ☐ RE-PUBLISH SITE AFTER NIGHTLY BACKUP
 - ☐ UPLOAD NEW/MODIFIED PRODUCTS PERIODICALLYA text field 'UPLOAD EVERY:' is set to '10 Minutes'. Below it is a checkbox for 'RE-PUBLISH SITE AFTER EACH UPLOAD'.

At the bottom, there are 'SAVE' and 'CANCEL' buttons, and two buttons for 'View Last Log' and 'View Last TCP/IP Response'.

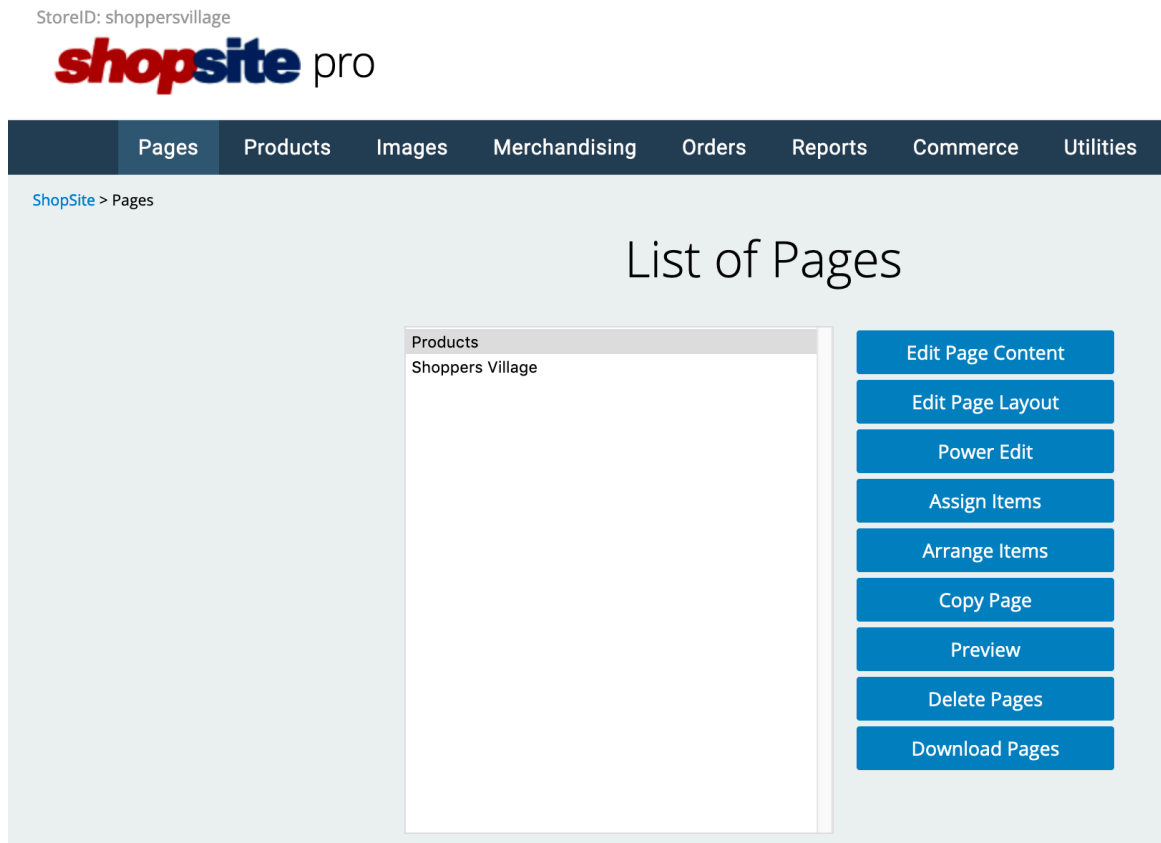
It's best if you let PIMS do the heavy lifting when maintaining your ShopSite Inventory. The more you can get PIMS to do, the less you need to configure things in ShopSite.

Let's go over each of these default settings, and explain what they do.

DEFAULT SHOPSITE PRODUCT PAGES:

In this area, you can enter the names of the ShopSite pages that you have created in ShopSite. These will act as a “Chooser” on the PIMS Inventory entry screens for insuring that you assign the correct pages you would like these individual products to show up on. This is optional.

This list comes from the “Pages” listing in ShopSite Back Office:



It's extremely important that the names you enter in PIMS match those in ShopSite. To add a page, simply click on the “+” button below the listing in PIMS.

We'll discuss this later, when training on the Inventory record...

PRODUCT UPLOAD CONTROLS:

This area contains checkboxes that control the flow of data to ShopSite.

ADD NEW PRODUCTS, IF NOT FOUND IN SHOPSITE:

This function will instruct ShopSite to enter new Inventory (that doesn't currently exist in ShopSite) to its database. It's beneficial to have this checked for obvious reasons.

DON'T UPLOAD "MORE INFO TEXT":

This instructs PIMS not to upload the Inventory record's "MORE INFO TEXT" from the “Additional Data For WEB” page (more on that later). If checked, that data will not be uploaded to ShopSite. If uploaded, PIMS will send this data to the ShopSite via the “<MoreInformationText>” tag, and also set the “<DisplayMoreInformationPage_>” tag to “checked”. You would check this only if you have manually entered Description data in the ShopSite database.

DON'T UPLOAD PRODUCT PAGES:

If checked, PIMS will not upload the “Product Pages” that the products are associated with. These are the same pages, as referenced above. You would only check this if you have manually assigned products to pages in ShopSite, and don’t want them overridden.

DON'T UPLOAD IMAGE URLS:

On the Inventory record’s “**Additional Data For WEB**” page (more on that later), there’s a field called “**PRODUCT IMAGE**”. This field generally holds the name of the image file in ShopSite associated with this product. If checked, PIMS will not upload this data.

REMOVE EMBEDDED HTML TAGS:

If this is checked, PIMS will remove “HTML” formatting tags from PIMS text fields being uploaded to ShopSite. This will keep these fields from conflicting with ShopSite’s page definitions. Generally, this is not needed.

DON'T UPLOAD TIER PRICING:

If checked, PIMS will not upload tier pricing to ShopSite. We will discuss Tier pricing and ShopSite later when we talk about the Inventory record.

DON'T UPLOAD CROSS-SELL ITEMS (PIMS ASSO. AUTOLOADS):

If checked, PIMS will not upload the Inventory record’s “**Associated Auto-Loads**” to ShopSite’s “**Cross-Sell Items**” listing. This will be covered in more detail later.

APPLY CHARACTER DATA ENCODING TO "TEXT" FIELDS "<![CDATA[...]]>":

If checked, PIMS will encase text fields with the HTML “CDATA” designation. As stated earlier, PIMS uploads Inventory data to ShopSite in a format called “XML”. This format has characters that designate the starting and ending of fields, as well as other things. Sometimes your data in PIMS can conflict with this. Especially if you have HTML tags in your data, or characters like “<” or “>”, etc. To insure this doesn’t happen, check this checkbox.

DON'T UPLOAD PRODUCT DESCRIPTION FIELD:

Normally, the optional “**Description**” field on the Inventory record gets uploaded to the ShopSite “<ProductDescription>” field. Check this checkbox if you have manually entered this information in ShopSite and don’t want it uploaded. However, it’s generally best if you let PIMS upload this information for you. Another condition that will keep this information from being uploaded, independent from this checkbox, is if the Inventory record’s “**Alert Entry Person**” is checked.

REMOVE 'VENDOR' FROM KEYWORDS:

If checked, PIMS will remove the Inventory record’s “**Vendor Name**” from the keywords uploaded to ShopSite. More on keywords later.

SET UPLOADED PRICE TO CUSTOMER PRICE CODE:

This is an optional field that will set all uploaded “Price” fields to the PIMS Price calculated by the Customer Price Code entered here. This should only be done if you have items with special “WEB” pricing that might differ from your normal Inventory pricing.

CUSTOM FIELD MAPPING:

PIMS uploads several fields from the Inventory records to ShopSite. However, there are hundreds of fields it does not upload. We've built-in a mechanism to allow you to choose additional PIMS fields and "map" them to existing ShopSite custom fields. You can then place these custom ShopSite fields onto your ShopSite Product Pages. Examples might be Warranty Information, Return Policies, etc. To map fields, click on the "Custom Field Mapping" button:

ADVANCED FIELD MAPPING

ORIGINAL PARAMETERS (RETIRED):

ISOLATE THESE "Custom_Alpha9" RECORDS ONLY:

☐ SEND CUSTOM ALPHA1

☐ SEND CUSTOM ALPHA5

☐ SEND CUSTOM ALPHA2

☐ SEND CUSTOM ALPHA6

☐ SEND CUSTOM ALPHA3

☐ SEND CUSTOM ALPHA7

☐ SEND CUSTOM ALPHA4

☐ SEND CUSTOM ALPHA8

☐ COPY 'RETAIL' TO CUSTOM 'ALPHA8' WHEN UPLOADING

☒ USE ADVANCED FIELD MAPPING

AVAILABLE FIELDS

PART_CODE

PRODUCT_NAME

MODEL_NUMBER

DISTRIBUTOR_NUMBER

BARCODE

DESCRIPTION

PRICE

MSRP_RETAIL

BOOK_COST

ORDER_LINEITEM_COST

WEIGHTED_COST

ADD_TO_DESCRIP

ALERT_DESCRIP

CATEGORY_CODE

CATEGORY_NAME

SUBCATEGORY1_CODE

SUBCATEGORY1_NAME

ID#	PIMS FIELD NAME	SHOPSITE PRODUCTFIELD
8	MSRP_RETAIL	<ProductField1>
15	CATEGORY_NAME	<ProductField2>
17	SUBCATEGORY1_NAME	<ProductField3>
19	FAMILY_NAME	<ProductField4>
		<ProductField5>
		<ProductField6>
		<ProductField7>
		<ProductField8>
		<ProductField9>
		<ProductField10>
		<ProductField11>
		<ProductField12>
		<ProductField13>
		<ProductField14>
		<ProductField15>
		<ProductField16>
		<ProductField17>

? ?+

Add ShopSite Field

Clear All Lines

Clear Line

CUSTOM PRODUCTS XML:

DONE

This is the custom field mapping page.

We won't discuss the "ORIGINAL PARAMETERS" section, as it was retired years ago, and exists for backwards compatibility until the User migrates their information to the newer method.

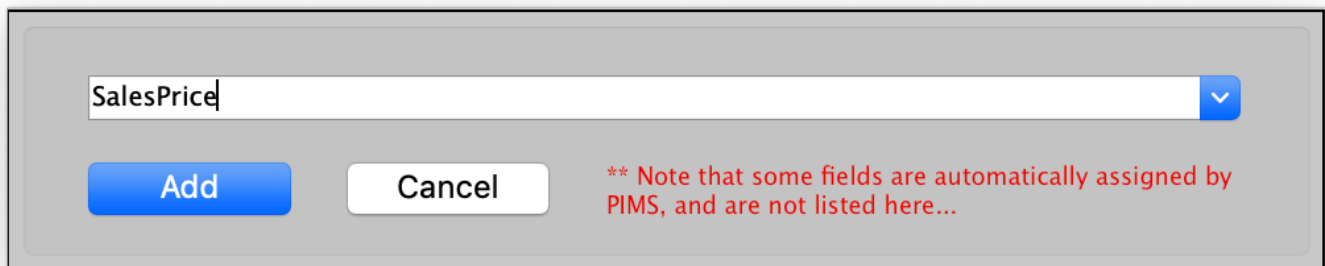
ShopSite currently has 50 custom User fields titled "ProductFieldn". You can place these anywhere on your Product Pages.

To map fields, you first want to check the "**USE ADVANCED FIELD MAPPING**" checkbox. This will enable the process.

On the left, you have the "**AVAILABLE FIELDS**" listing. Simply select a field from the listing, and drag it over to a corresponding ShopSite field in the ShopSite field listing. That's it!

To clear a mapped field, select the line from the ShopSite listing and click the "**Clear Line**" button. To clear all lines, click the "**Clear All Lines**" button.

If you wish to map a field to something other than the ShopSite "ProductFieldn" fields, click the "**Add ShopSite Field**" button. You will then be prompted for a field name:



SalesPrice

Add Cancel

** Note that some fields are automatically assigned by PIMS, and are not listed here...

This entry field is also a pop-down menu, where you can select from a listing of Inventory record fields.

Be careful not to enter a field name that PIMS automatically uses. This could cause weird effects!

Once selected, it will be added to the listing for you to assign a PIMS field to:

		<ProductField46>
		<ProductField47>
		<ProductField48>
		<ProductField49>
		<ProductField50>
		<SalesPrice>

The “**CUSTOM PRODUCTS XML**” area is for advanced Users who wish to add their own XML code to the file being uploaded to ShopSite. It is not the purpose of this document to explain this further.

AUTOMATED PRODUCT UPLOAD SERVER PROCESS:

This area is where you can configure PIMS to automatically upload modified/new Inventory to ShopSite on a periotic basis.

PLEASE NOTE: *Before telling PIMS to automatically upload your Inventory, you should manually instruct PIMS to do so. This way you can make sure everything is working to your liking, and your settings are correct.*

Here are the controls you have available:

AUTOMATED PRODUCT UPLOAD SERVER PROCESS:

☐ **UPLOAD NEW/MODIFIED PRODUCTS AFTER NIGHTLY BACKUP**
☐ **RE-PUBLISH SITE AFTER NIGHTLY BACKUP**

☒ **UPLOAD NEW/MODIFIED PRODUCTS PERIODICALLY**
UPLOAD EVERY:

☒ **RE-PUBLISH SITE AFTER EACH UPLOAD**

You have basically two choices:

Upload Inventory at the end of the day, during your Nightly Back-up

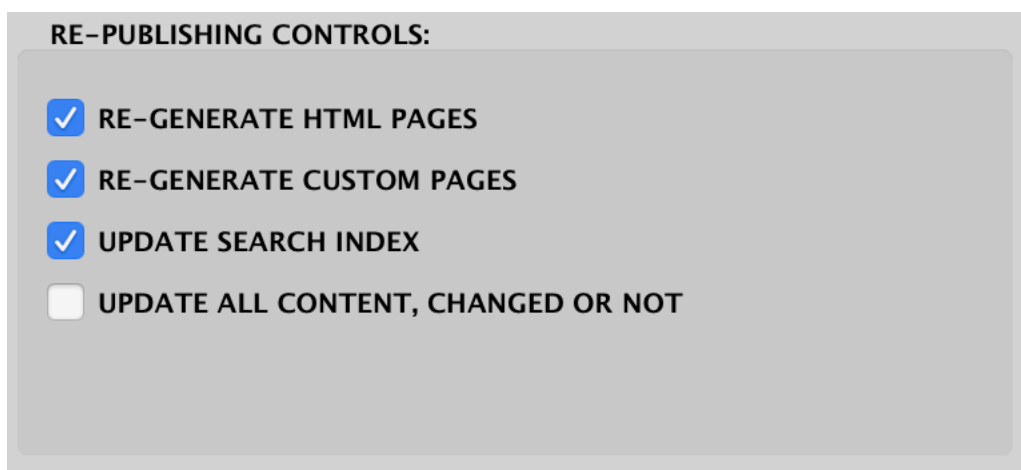
Upload Inventory every so many minutes

Almost everyone opts for the latter, and uploads periodically.

Simply check the appropriate checkboxes, and enter a period cycle (**UPLOAD EVERY:**). 30 minutes is a good starting point. You would check the “**RE-PUBLISH SITE AFTER EACH UPLOAD**” checkbox if you wish PIMS to instruct ShopSite to “Publish” your affected pages after modified/new products are uploaded. This isn’t important if you are not uploading “Product Pages” as well.

RE-PUBLISHING CONTROLS:

This area contains parameters used to tell ShopSite how to update your WEB Site after products are uploaded.



RE-PUBLISHING CONTROLS:

- ☒ RE-GENERATE HTML PAGES
- ☒ RE-GENERATE CUSTOM PAGES
- ☒ UPDATE SEARCH INDEX
- ☐ UPDATE ALL CONTENT, CHANGED OR NOT

The first three checkboxes should usually be checked. These are used in PIMS when issuing the ShopSite “generate.cgi” command. Basically, these four checkboxes correlate to the following parameters for this call:

```
htmlpages=1
custompages=1
index=1
regen=0
```

These parameters are only sent if a checkbox is checked.

OTHER FUNCTIONS ON THIS PAGE:

View Last Log:

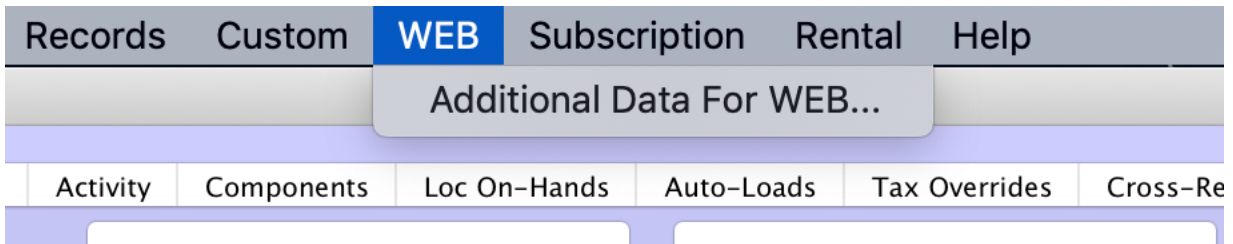
Clicking this button will display the last ShopSite connection log.

View Last TCP/IP Response:

Clicking this will display the last response sent back from the ShopSite server.

Now let's talk about what's needed on the Inventory record's entry screen to finish the ShopSite Inventory set-up.

The Inventory record has a special area just for ShopSite specific data. To access this area, select "**Additional Data For WEB...**" from the "**WEB**" menu:



This will display the Inventory **WEB INFORMATION** screen:

WEB INFORMATION (INVENTORY)

Paris Works

ShopSite Specific

ICM

OK To Show On WEB

READY FOR WEB

ADDITIONAL INFO:

PRODUCT NAME TO USE INSTEAD:

MORE INFO TEXT:

With its elegant points and slim, lovely shape, Alvaro Uribe's dazzling 8 Point Star is a true holiday original. Watch it gleam and shine, especially when hung against a backdrop of deep forest green or rich reds and golds, or even woodwork. An objet d'art that celebrates the holiday, this ornament is crafted to the highest standards. Nambe alloy's tarnish-resistant properties mean the 8 Point Star will retain its shine for decades to come.

ADD TO PRODUCT PAGE:

Products|Shoppers Village

ADDITIONAL URLS:

PRODUCT IMAGE:

ParisWorks.png

MORE INFO IMAGE:

SPECIAL WEB CATEGORIES:

CATEGORY1:

a

CATEGORY2:

b

CATEGORY3:

c

CATEGORY4:

b

EXTERNAL WEB ID:

30

SPECIAL WEB PRICE:

\$49.95

ShopSite Pro

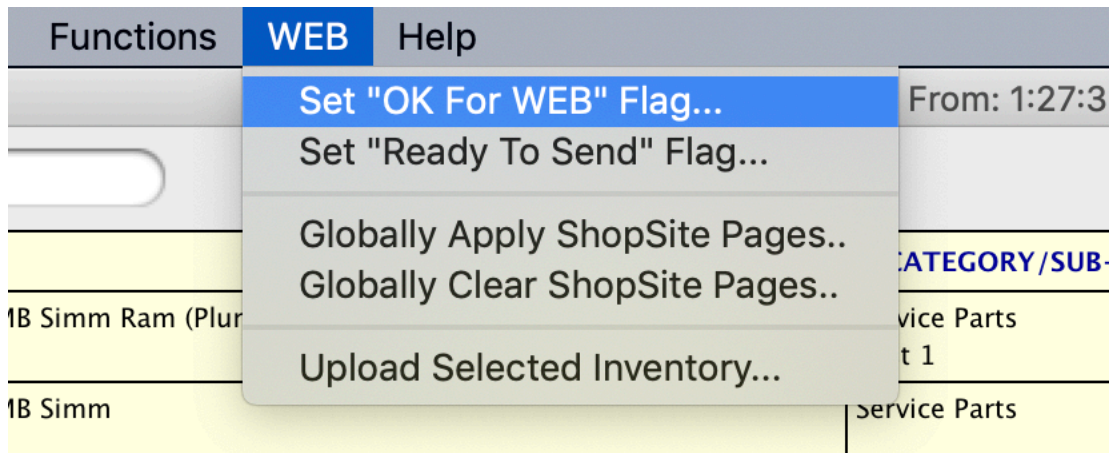
CUSTOM XML:

DONE

The following will describe what we have here.

Because you won't want all of your Inventory products to have a "WEB" presence, the **"OK To Show On WEB"** checkbox exists. Only Inventory records with this checked will be processed automatically and uploaded to ShopSite. There are ways to manually upload any Inventory to ShopSite, but that will be discussed later.

So that you don't need to open each Inventory record and set this flag, there is a global function that can be applied to a group of Inventory records on an Inventory Listing:



Simply produce an Inventory listing of your choosing, select some records, and run the “**Set ‘OK For WEB’ Flag...**” function.

The “**READY FOR WEB**” flag (checkbox) is automatically set by PIMS, but can be manually set as well. When PIMS runs it’s automated Inventory uploads, it looks for “**OK For WEB**” records with the “**READY FOR WEB**” flag set. Once uploaded, that flag is cleared until next time it’s modified. Basically, this flag is set every time an Inventory record is saved.

PRODUCT NAME TO USE INSTEAD:

This is an optional field where you can enter a product name to be used for ShopSite that differs from the default Product Name as found on the Inventory record. You would only use this if you want a different name displayed in ShopSite. Possibly because the Product Name in PIMS has offending characters, etc.

MORE INFO TEXT:

This is a large text block that is uploaded to the ShopSite “<MoreInformationText>” field. Clicking on the “**MORE INFO TEXT:**” text button will display a bigger screen to enter data into.

ADD TO PRODUCT PAGE:

These are the ShopSite product page names you would like this Inventory product to be added to. Pages need to be separated by the “|” (pipe) character. If you click on the “**ADD TO PRODUCT PAGE:**” text button, you can select from a listing of pages that you created in the PIMS ShopSite Settings page. Click on the green dot button will give you a larger field to manually enter these pages into.

PRODUCT IMAGE:

This is the name of the image file stored in the ShopSite database for this product.

MORE INFO IMAGE:

This is the name of the image file stored in the ShopSite database to use as a button to display more product information. It exists for backwards compatibility only.

SPECIAL WEB CATEGORIES:

These four optional fields hold data that is added to the existing Inventory “Keywords” data uploaded to ShopSite. These are separate to the ones already calculated for the Inventory record.

EXTERNAL WEB ID:

This exists for backwards compatibility and is not used anymore. However, you can use it for whatever you want, as it’s not uploaded to ShopSite these days.

SPECIAL WEB PRICE:

If this field is anything but zero, this Price will be uploaded to ShopSite instead of the regular Inventory **PRICE** field.

CUSTOM XML:

If you find the need to add your own XML data to the file uploaded, this is where you would enter it.

The following is a detailed description of what data PIMS uploads to ShopSite, and how it is determined:

PIMS FIELD:	PIMS FIELD LABEL	SHOPSITE FIELD:
PRODUCT_NAME	NAME	<Name>
WEB_NAME_TO_USE <i>** If this field has something in it, or PRODUCT_NAME is used.</i>	PRODUCT NAME TO USE INSTEAD	<Name>
PART_CODE	PART CODE	<SKU>
PRICE	PRICE	<Price>
ICM_Price1 <i>** If this field is <u>not</u> zero, then this price is uploaded instead</i>	SPECIAL WEB PRICE	<Price>
NON_TAXABLE	Non-Taxable	<Taxable>unchecked</Taxable>
WEIGHT	SHP. WEIGHT	<Weight>
TOTAL_ONHAND	TOTAL ON-HAND	<QuantityOnHand>

PIMS FIELD:	PIMS FIELD LABEL	SHOPSITE FIELD:
KEYWORDS ** Please Note: The “Keywords” uploaded to ShopSite are made up of the following Inventory record fields: ADDITIONAL KEYWORDS Field WEB CATEGORY Fields 1 Through 4 Every Word In PRODUCT_NAME Every Word In PART_CODE BARCODE Field FAMILY_NAME Field VENDOR_NAME Field (can be optioned-out) MFG_NAME Field CATEGORY_NAME Field SUBCATEGORY1_NAME Field COLOR Field SIZE Field	N/A	<SearchKeywords>
DESCRIPTION	DESCRIPTION	<ProductDescription>
WEB_PRODUCT_PAGE	ADD TO PRODUCT PAGE	<ProductOnPages>
WWW_TextBlock ** If text exists here, the “<DisplayMoreInformationPage_>” field is set to “Checked”.	MORE INFO TEXT	<MoreInformationText>
WEB_MOREINFORMATIONGRAPHIC		<MoreInformationGraphic>
wwwPICTURL	PRODUCT IMAGE	<Graphic>
TIER_PRICING ** This is discussed in detail later...	PROMO PRICING	<QuantityPricing>
ASSOCIATED_AUTOLOADS	AUTO-LOADS	<CrossSell>
CUSTOM MAPPING	N/A	<ProductField1-50>

QUANTITY PRICING:

PIMS will look to your Inventory record's "**Promo-Pricing**" listing to determine if "Quantity Pricing" is available:

Home Promo-Pricing Activity Components Loc On-Hands Auto-Loads Tax Overrides Cross-Ref							
Paris Works							
PRICE CODE	START DATE	END DATE	FROM	TO	DISCOUNT	PRICING METHOD	
	00/00/00	00/00/00	11	20	20.0% / 0% / 0%	<input checked="" type="checkbox"/> Discount Off	<input type="checkbox"/> Mark-Up <input type="checkbox"/> % Of Margin
	00/00/00	00/00/00	1	10	10.0% / 0% / 0%	<input checked="" type="checkbox"/> Discount Off	<input type="checkbox"/> Mark-Up <input type="checkbox"/> % Of Margin

If you do have Promo-Pricing available with a number in the "**FROM**" field, then PIMS will upload this to ShopSite as "Quantity Pricing":

Paris Works

Quantity	1 - 10	11+
Price	\$45.00	\$40.00
On Sale!	\$45.00	\$40.00

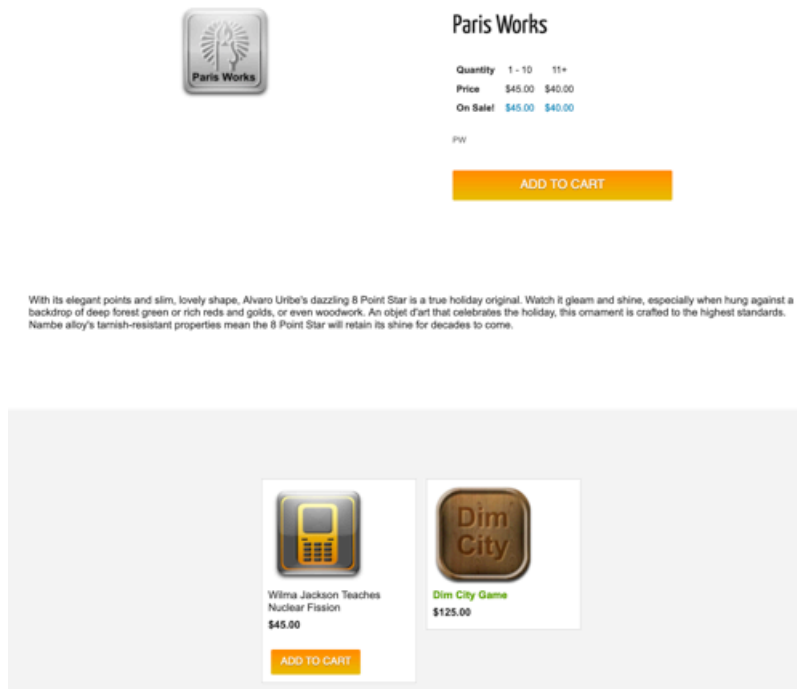
PIMS will calculate the price needed by ShopSite, regardless of how it's entered in PIMS. In this example, the original Inventory **PRICE** was \$50.00.

CROSS-SELL:

PIMS will look to your Inventory record's "**Auto-Loads**" listing to determine if "Cross-Selling" is available:

Home Promo-Pricing Activity Components Loc On-Hands Auto-Loads Tax Overrides Cross-Ref Alt.					
Paris Works					
PART CODE	QTY	PRODUCT NAME	DISCOUNT		
WJTNP	1	Wilma Jackson Teaches Nuclear Fission			
DC	1	Dim City Game			

If so, PIMS will upload this data to ShopSite (**Auto-Loads** at bottom of page):

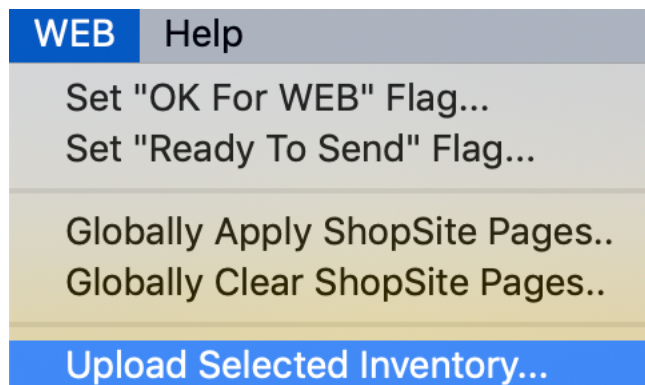


ShopSite will display these **Auto-Loads** on your product page, in the manner you have laid out in your design.

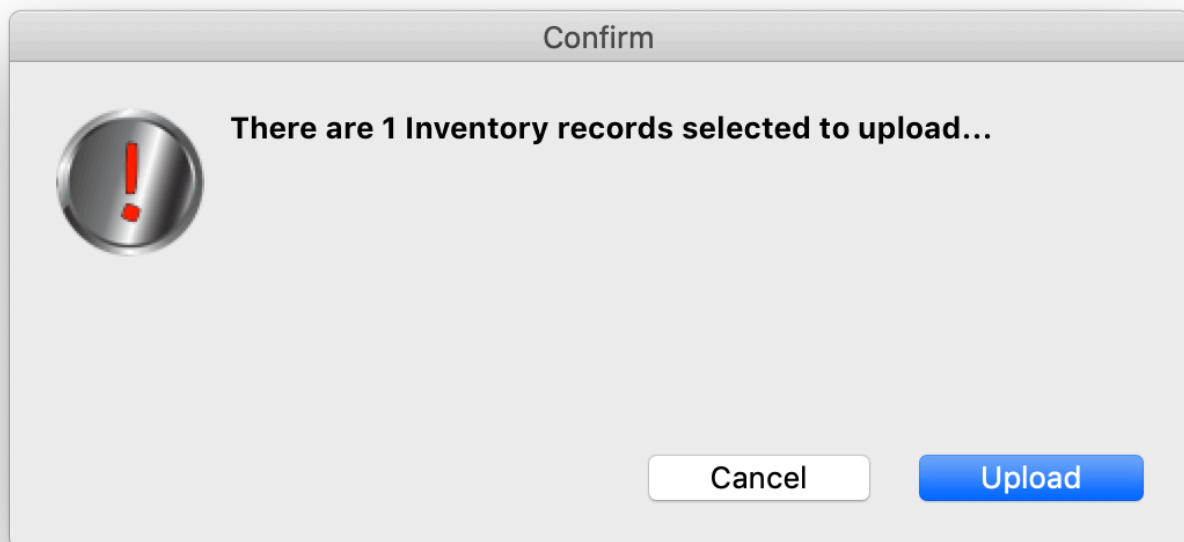
MANUALLY UPLOADING INVENTORY TO SHOPSITE:

There are a couple of ways to manually upload Inventory to ShopSite. Again, it's a good idea to do this before automating the process.

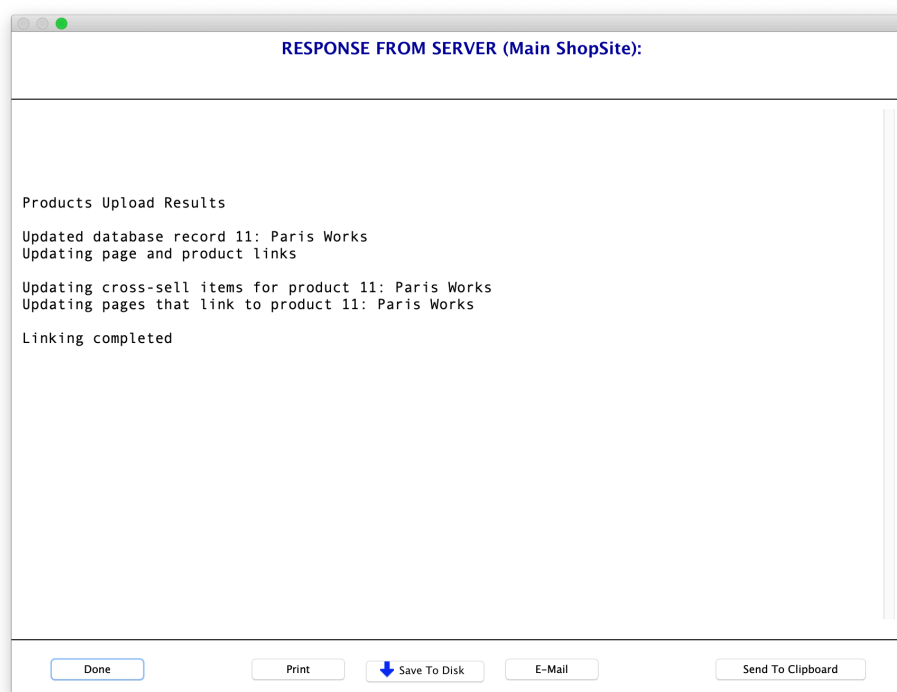
One way is from an Inventory listing. Produce a listing of records, select some, and then select **"Upload Selected Inventory..."** from the **"WEB"** menu:



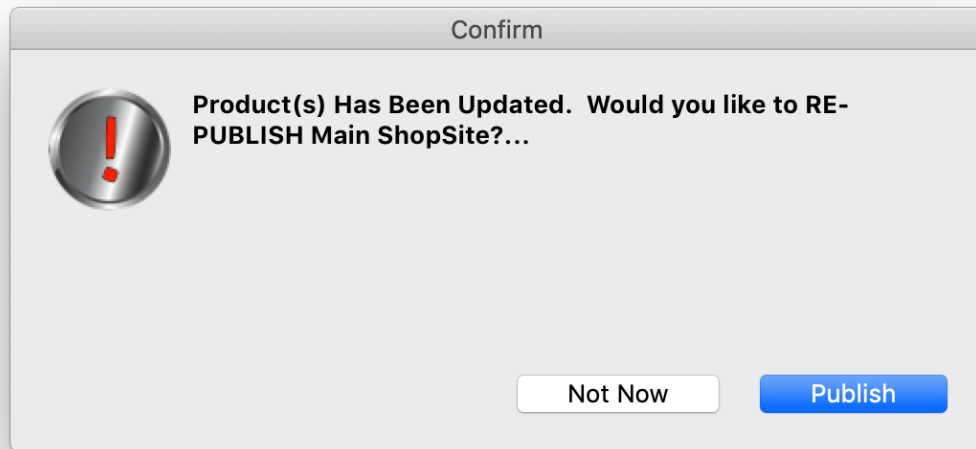
You will first be prompted to continue:



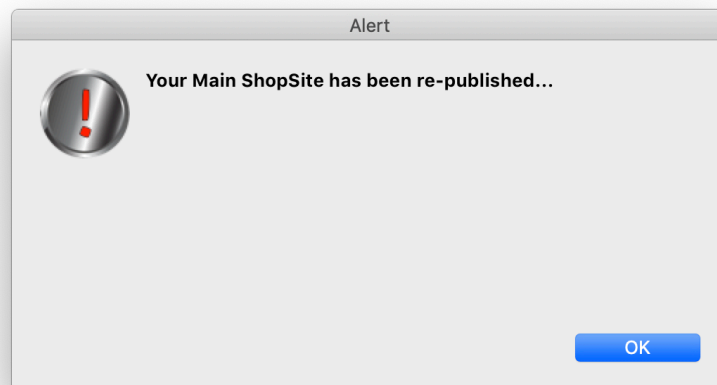
The process will then quickly run, and display its conclusion:



Once the products are uploaded, you will be asked if you would like to publish your changes (make them live):



If you selected “**Publish**”, and everything goes as planned, you’ll see this:



The other method of manually uploading Inventory is to invoke the automated Inventory upload process on a one-time basis. To do this, go to the **WEB Services Module**, and select “**Upload Modified Inventory...**” from the “**ShopSite**” menu:

ShopSite	VP-ASP	NetSol	iOS\W
ShopSite Link Setup...			
Download Orders...			
Manually Import Order XML File...			
Upload Modified Inventory...			
Visit ShopSite.com			
Visit Lexiconn.com			
Visit Your ShopSite Site			
Visit Your ShopSite Backoffice			
Find Inventory By PRODUCT PAGE			

This will run the same process as though you had the automatic uploads processes set. You will see the same prompts as above.

If special data requirements are needed, ExecUtron can create a custom plug-in to accommodate most needs (fees apply). Talk with your PIMS Reseller if you think this is needed.

DOWNLOADING SHOPSITE ORDERS:

Orders created in ShopSite can be either manually or automatically downloaded into PIMS.

When Orders are downloaded and created in PIMS, they default to the “**Worksheet**” Order type. This makes them a dormant document, meaning no product holding or backordering will take place until the order is verified by you. At that point, you can choose to turn the Order into a **Salesorder** or **Invoice**.

Before downloading Orders from ShopSite, you need to complete some PIMS ShopSite settings as well as configure some optional records in PIMS. Not to mention lots of settings need to be configured in ShopSite itself. Again, it’s not the scope of this document to tell you how to setup ShopSite.

You first need to determine if you will be having ShopSite run your credit cards for you, or whether you’ll be downloading Orders and running the credit cards in-house (*offline*). PIMS can handle either method. There are Pros and Cons either way. If you let ShopSite run your cards for you, then everything is handled and you only need to ship products. However, it’s a done deal (even if you find mistakes). The advantage of running cards back at your company is that you can have more control over the Order prior to pulling the trigger. The choice is yours...

USE SHOPSITE FOR "Import On-Line Orders..." MENU:

When this is checked, this tells PIMS that this is the site where you will be downloading Orders. Specifically, it's referring to this menu function:

Orders	P.O.	Receiving	RMAs	Em
Create New Order...				⌘O
Start POS Terminal...				⌘J
Import On-Line Orders...				
List Unprocessed Imports...				
List Mobile Orders...				

This is where you can manually download Orders. More on that later.

DEFAULT IMPORTED ORDERS TO BACKORDERED:

If checked, all valid Order line-items downloaded will be set to a "backordered" status. **SHIP'D** is zero. You would only want to check this if you would like to order products specifically for the WEB, and not dip into your retail floor Inventory. It all depends on how your business is set up.

PAYMENTS WILL BE PROCESSED OFF-LINE:

Check this if you plan to run credit cards in-house and not have ShopSite do it for you.

OPTIONAL DEPARTMENT CODE:

This is where you would enter a valid PIMS **Department Code**. Again, this is optional. However, it would give you finer control over WEB sales and associated accounting. More on this later.

AUTOMATICALLY DOWNLOAD ORDERS FROM SERVER:

Like Inventory uploads, you can specify an interval for PIMS to automatically check and download Orders. You can simply check this and enter a "**DOWNLOAD EVERY**" number of minutes. 30 minutes is an average setting.

SHOW PROGRESS METER ON SERVER:

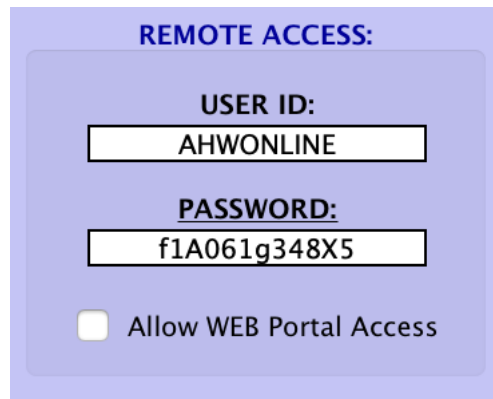
This exists for legacy purposes. It will simply display a process bar on the server when downloading Orders. It's not necessary, and is optional.

PIMS PAYMENT TYPE FOR "Generic1" (and "Generic2"):

These fields can hold optional **Payment Types** that are not part of ShopSite. This could include such things like "Cash", "Net 30", etc. Usually these are not needed, as ShopSite provides many WEB-friendly payment type options. If you do need these, then just click in the fields provided and select from the PIMS Payment Type displayed.

LOOKUP CUSTOMERS BASED ON USER ID:

ShopSite has the ability to store Customer IDs, and/or it creates them itself. If this is checked, PIMS will attempt to find a **Customer** record in PIMS based on this Customer ID returned by ShopSite (if any). The ShopSite field PIMS is looking at is "<CustomerID>". If configured to do so, and this ShopSite field is not blank, PIMS will search Customer records for the **USER ID** found on the "**More Information**" page of the Customer entry screen:



The screenshot shows a configuration window titled "REMOTE ACCESS:". Inside, there are two input fields. The first is labeled "USER ID:" and contains the text "AHWONLINE". The second is labeled "PASSWORD:" and contains the text "f1A061g348X5". Below these fields is a checkbox labeled "Allow WEB Portal Access", which is currently unchecked.

LOOKUP CUSTOMERS BASED ON E-MAIL:

Most of the time no ShopSite CUSTOMER ID exists and is not downloaded. To compensate for this, PIMS can find a Customer record in PIMS based on the e-mail address downloaded with the ShopSite Order. If this is checked, PIMS will look for a matching e-mail address in the Customer file. If found, this Customer will be associated with the downloaded Order by loading their **Customer Code** to the Order. No address information on the Order is changed, even if the ShopSite address information differs from the Customer record. The ShopSite information must take precedence.

MAKE "COMMENT" AND "ORDER INSTRUCTIONS" LINE-ITEMS:

Depending on how you've configured your ShopSite, Customer "Comments" and "Order Instructions" can be downloaded with the Orders. This information is stored in the Order's **Version History**. However, if this checkbox is checked, PIMS will also create "remark only" Order line-items with this information. This way, the Customer can see these on their PIMS Invoice as well.

ADD "SelectedOption" TO LINE-ITEM DESCRIPTION:

ShopSite allows you to have "Options" for its Inventory items. On our example WEB site, you have a pair of sunglasses that come in either black or brown. When downloading items of this nature, the selection option (in this case "Black Glasses" or "Brown Glasses") is downloaded along with this item. If this checkbox is checked, this option text will be added to the PIMS Order line-item Description. This is optional, as the Description in PIMS might already have this information as part of it. We don't want it to be redundant. This all depends on how your Inventory and ShopSite are configured.

COUPON TRANSLATIONS:

As stated earlier, PIMS can process ShopSite discount "Coupons". To do this, you need to set up Inventory records in PIMS that match the Coupon records in ShopSite.

Let's start with the Coupons in ShopSite:

When you set up a Coupon in ShopSite, you have tons of options:

The screenshot shows a form for creating a coupon in ShopSite. It is divided into several sections:

- Coupon Display Name:** A text input field containing "VIP Discount".
- Coupon Promo Code:** A text input field containing "VIP".
- Expires:** A date and time picker set to "Apr 13, 2029 02:15 pm". Below it, it says "Server time: Apr 13 2019 at 4:04 pm".
- One Time Use:** Radio buttons for "No" (selected) and "Yes".
- Discount Type:** Three options: "10.00 %" (selected), "\$ 0.00", and "Free Shipping". A note below "Free Shipping" says "(This feature is currently disabled, [Click Here](#) to enable)".

This is but a sampling of ShopSite's Coupon options.

The only thing PIMS cares about is the ShopSite **"Coupon Promo Code"**. This needs to match a corresponding **PART CODE** in PIMS:

The screenshot shows the "IDENTIFICATION:" section of a PIMS form. It has a navigation bar at the top with tabs: Home, Promo-Pricing, Activity, Components, Loc On-Hands, Auto-Loads, Tax Overrides, Cross-Ref, and Alt. Vende. The form fields are:

- PART CODE:** Input field with "VIP".
- NAME:** Input field with "Special VIP Discount".
- MODEL#:** Input field with "VIP".
- DESCRIPTION:** Input field with a dropdown arrow.
- DISTRIBUTOR#:** Input field with "VIP".
- PRODUCT URL:** Input field with a dropdown arrow.
- BARCODE:** Input field with "D-1964-M".
- Checkboxes for "Load With Name" and "Alert Entry Person" are also present.

ShopSite Coupons in PIMS don't need a **PRICE** entered on them, as the "discount" dollar amount returned by ShopSite is used as the Order line-item Price (as a negative). This Inventory record

should be marked as “**Don’t Adjust On-Hands**”. Assigning a **Category Code** with overriding G/L accounts can help with reporting and add accounting figures for specific profit/loss reporting.

To set up a Coupon in PIMS, simply click on the **COUPON TRANSLATIONS** area (lights up “+” button), and click the “+” button.

COUPON:

PART#:

This will create a new blank Coupon record for you. Now type in the ShopSite “**Coupon Promo Code**” as entered in ShopSite. From there, click on the “**PART#:**” text button. This will display the standard product chooser for you to select the Inventory record associated with this Coupon. That’s it!

When Coupons are downloaded, they are added to the PIMS Order like this:

	PART#	PRODUCT DESCRIPTION	QTY	SHD'D	DISC%	NT	PRICE	EXTENDED	
001	PW	Paris Works	2	2	0%	<input type="checkbox"/>	\$45.00	\$90.00	
	AOR1	MARGIN: 44.4%, MARK-UP: 80.0%, PROFIT: \$40.00	None	0	PC: <input type="text"/>		\$25.0000 Overridden		<input type="checkbox"/>
002	WJTNP	Wilma Jackson Teaches Nuclear Fission	1	1	0%	<input type="checkbox"/>	\$45.00	\$45.00	
	SW	MARGIN: 28.9%, MARK-UP: 40.6%, PROFIT: \$13.00	None	0	PC: <input type="text"/>		\$32.0000 Overridden		<input type="checkbox"/>
003		Coupon "VIP Discount" Applied...	1	0	0%	<input type="checkbox"/>	-\$13.50	-\$13.50	
		MARGIN: ---, MARK-UP: ---, PROFIT: -\$13.50	None	0	PC: <input type="text"/>		No Cost Overridden		<input type="checkbox"/>

Roll Back Prices To Match Subtotal:

If this checkbox is checked, there is no need to set up Coupon Inventory records in PIMS. When Coupons are downloaded from ShopSite with this checked, PIMS will add the name of the Coupon to the Order line-items as a remark only (no **Part Code**). It will then ripple through the other line-items and discount their Prices to match the Subtotal that ShopSite has calculated. The advantage of this is that your sales figures will reflect the profit margins of individual items:

	PART#	PRODUCT DESCRIPTION	QTY	SHD'D	DISC%	NT	PRICE	EXTENDED	
001	PW	Paris Works	2	2	0%	<input type="checkbox"/>	\$40.50	\$81.00	
	SW	MARGIN: 38.3%, MARK-UP: 62.0%, PROFIT: \$31.00	None	0	PC: <input type="text"/>		\$25.0000 Overridden		<input type="checkbox"/>
002	WJTNP	Wilma Jackson Teaches Nuclear Fission	1	1	0%	<input type="checkbox"/>	\$40.50	\$40.50	
	SW	MARGIN: 21.0%, MARK-UP: 26.6%, PROFIT: \$8.50	None	0	PC: <input type="text"/>		\$32.0000 Overridden		<input type="checkbox"/>
003		Coupon "VIP Discount" Applied to the above products...	0	0	0%	<input type="checkbox"/>	No Charge		
		MARGIN: ---, MARK-UP: ---, PROFIT: N/A	None	0	PC: <input type="text"/>		No Cost		<input type="checkbox"/>

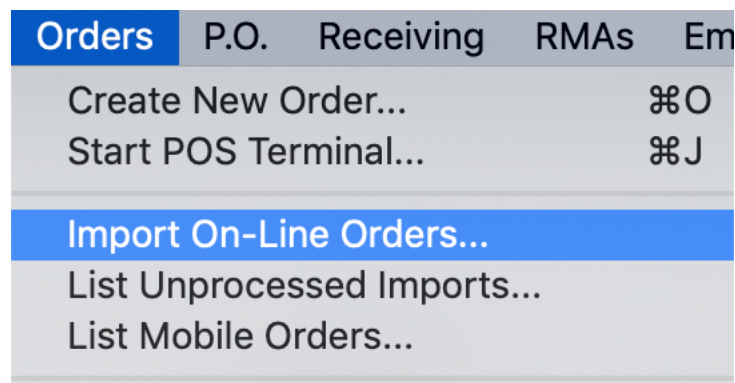
** Notice the change in Prices...

CONNECTION HISTORY:

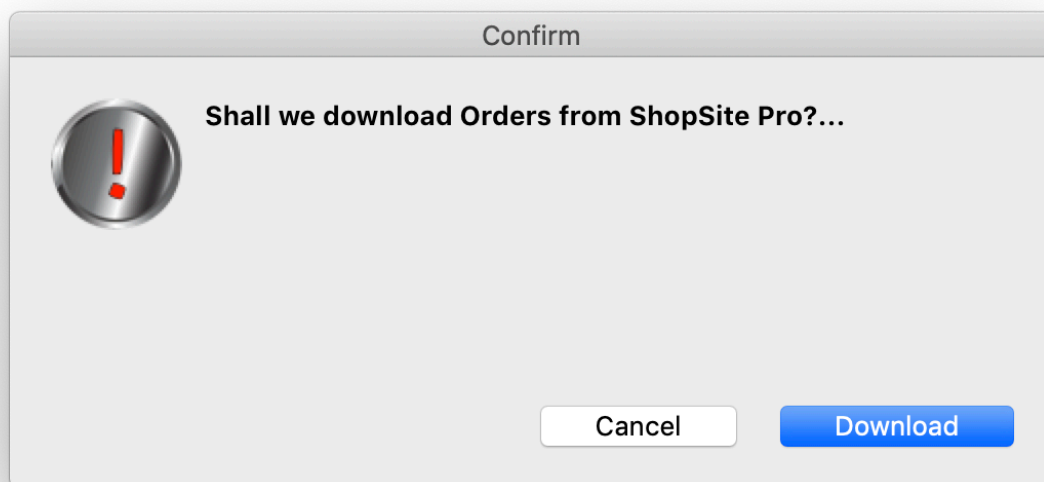
This area simply details information about the last Order download. Clicking on the text button “**LAST ORDER NUMBER**” will allow you to change the last successful ShopSite Order# downloaded. This is handy if you wish to start the automated Order download from this point on.

DOWNLOADING ORDERS MANUALLY:

Again, Orders can be downloaded either manually or automatically. To download Order manually (recommended initially), simply select “**Import On-Line Orders...**” from the main “**Orders**” menu:



Upon doing so, you must then verify that this is what you'd like to do:



When you click the “**Download**” button, you will be prompted to choose a range of Orders to download:

Main ShopSite

PULL BY NEXT ORDER#

☒ NEXT ORDER#: 1241

PULL BY NEXT DATE RANGE:

☐ ORDER DATE RANGE: 04/14/2019 TO 00/00/0000

DOWNLOAD CANCEL

You can either “**PULL BY NEXT ORDER#**” (recommended), or by data range. PIMS automatically keeps track of the last Order# downloaded from ShopSite, and will start at the next Order# and download all that are ready for download. You can alter that number from here if needed.

The “**PULL BY NEXT DATE RANGE**” defaults to the day after your last download. This method basically exists for backwards compatibility with older PIMS and ShopSite.

When you click “**Download**”, PIMS will tie into ShopSite and command it to start offering PIMS Orders in an XML format. When finished, PIMS will display what happened:

MAIN CONNECTION LOG

Order Download Process Started: 04/13/2019 at 2:22 PM

Starting With Order#: 1241

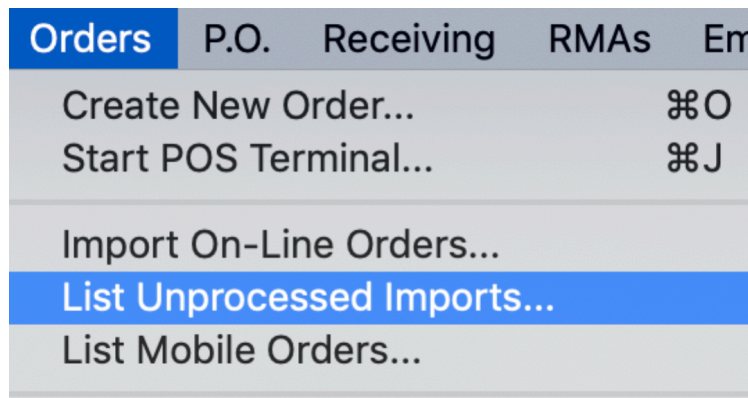
There are 1 Orders to download...

There were 1 Orders successfully downloaded...

Process finished at 2:22 PM and took 0 hour 0 minute 1 second to run...

Downloading is usually very fast.

When Orders are downloaded, either automatically (every so often) or manually, you can list these new unprocessed Orders by selecting “**List Unprocessed Imports...**” from the “**Orders**” menu:



“Unprocessed” means that these Orders have not been opened and saved by anyone yet. Once opened and saved, they will not appear in this listing anymore. At that point, they are considered processed.

Let’s explore what is downloaded and used to create a PIMS Order from ShopSite:

The following is an explanation of each bit of data downloaded, and how it becomes Order data in PIMS:

For each Order downloaded, a new blank Worksheet Order is created in PIMS.

The ShopSite “Order#” is placed in the PIMS “**REFERENCE#**” field:

REFERENCE#:

ORDER# ▲	DATE ▲	CUSTOMER "BILL-TO" NAME ▲	SP	LOC	P.O. NUMBER ▲	REFERENCE#/MRKT	S/L	G/L	SHIPPED	TOTAL	TYPE
1293	04/13/19	Dan Mosier	RR	MAIN		1241			00/00/00	\$132.28	WS

The Worksheet Order **Date** and **Time** are set to the Date and Time the Order was created in ShopSite, and not when it was created in PIMS. This helps avoid confusion on the part of the Customer, when/if they see the Invoice in PIMS.

The ShopSite “**Transaction ID**” is placed in the Worksheet’s “**Order History**”.

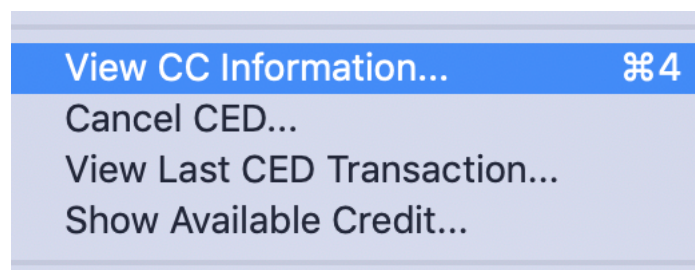
The Billing and Shipping Customer information from ShopSite is loaded to the Order. This is regardless of what might exist on an associated PIMS Customer record (if any).

PLEASE NOTE: PIMS will display the ShopSite Order# in the **REFERENCE#** field, but PIMS will always assign the next system Order# for the PIMS Order itself...

Whether a credit card is run on ShopSite or not, the following card information is securely download and added to the Worksheet:

Issuer (card type – VISA, MasterCard, etc.)
Number
Name On Card
Expiration Date
CVC Code (Note: This can only be viewed in ShopSite or downloaded once)
Payment Gateway (or “offline” for manual processing at your Company)
Payment Status
Order Processing Info

The card information is loaded to the PIMS “CC” data area, which can be accessed from selecting **“View CC Information...”** from the Order entry screen’s **“Functions”** menu:

A screenshot of a software window titled 'CREDITCARDS LOADED ON THIS ORDER:'. The window has a light gray background and a title bar with standard window controls. Inside, there is a table with seven columns: 'CARD NUMBER:', 'EXP:', 'NAME ON CARD:', 'CVC:', 'TRANSACTION ID:', 'PRE-AUTH EXPIRES:', and 'ADDITIONAL REFERENCE:'. The first row of data shows 'XXXX XXXX XXXX 0010' for the card number, '**/**' for the expiration date, 'Demo Cardholder' for the name, '***' for the CVC, and '00/00/0000' for the pre-auth expiration. Below the table, there is a 'Done' button on the left and a 'CUSTOMER PROFILE CODE OVERRIDE:' label followed by a text input field on the right.

Please note that on a “Demonstration” ShopSite WEB system, credit card information is masked. The “CVC” (security) code will be masked as “***” if this is not the first time the Order has been downloaded and/or you have already viewed it in the ShopSite Back Office.

Credit card information can also be found in the Worksheet's "**Order History**":

```
-----  
04/13/19 @ 2:22 PM - User: Designer on Mosier iMac 5K LOC: MAIN:  
Credit Card# - *****0010  
-----  
04/13/19 @ 2:22 PM - User: Designer on Mosier iMac 5K LOC: MAIN:  
CVC Of Card - ***  
-----  
04/13/19 @ 2:22 PM - User: Designer on Mosier iMac 5K LOC: MAIN:  
Name On Card - Demo Cardholder  
-----  
04/13/19 @ 2:22 PM - User: Designer on Mosier iMac 5K LOC: MAIN:  
Expiration Date Of Card - **/**  
-----  
04/13/19 @ 2:22 PM - User: Designer on Mosier iMac 5K LOC: MAIN:  
Authorization Of Card - offline  
-----
```

When a Payment type is downloaded from ShopSite, PIMS will attempt to find a match in its system. If not found, PIMS will add it. It has no choice. Hopefully you have this set up ahead of time, so that PIMS doesn't have to do this. If a new **Payment Type** is added to PIMS from ShopSite, be sure and check it's record for proper settings that match that type (like Processing Required, etc.).

If the Payment Type is "PurchaseOrder", then PIMS will place the Purchase Order number in the **Purchase Order** Number field.

If one of the ShopSite "Generic" Payment types is encountered, PIMS will map it out to the corresponding Payment Type as denoted in the PIMS ShopSite settings.

If your ShopSite orders contain, Tax, PIMS will do the following:

Based on the "<TaxName>" downloaded, PIMS will check to see if a PIMS **Tax Jurisdiction** exists in the system by that name. If it does, PIMS will load it to the Order. If not, it's created in PIMS and then loaded to the Order. This insures that the rate charged by ShopSite is mirrored by PIMS. If it does exist but has a different Tax Rate, then PIMS will update it to match ShopSite.

If ShopSite has taxed the Shipping amount, then PIMS will modify and reload the associated PIMS **Tax Jurisdiction** to reflect this condition and recalculate the taxes.

If ShopSite has applied a Discount (non-Coupon) to the Order, PIMS will create a remark Order line-item stating that "A discount of [\$\$\$] was applied to this Order...". The figures were already adjusted by ShopSite, per line-item, before downloading.

Coupon processing has already been explained above...

If Shipping is calculated and used by ShopSite, PIMS will download the data to the Order. The PIMS **“SHIPPER”** is set to the ShopSite Shipping “Description”.

The Order “Notes” field is put in the Order’s **“Order History”**.

The ShopSite type of Shipping applied to the Order is placed in the Order’s **“Order History”**.

The ShopSite “Customer Checkout Field” is placed in the Order’s **“Order History”**.

The ShopSite order “Comments” are placed in the PIMS **“CUSTOMER SHIPPING NOTES”** field. If this exists, then a **green** blinking dot will appear next to the Order entry screen’s **“SHIPPER”** field. Clicking on this will display the Comments. The Comments are also placed in the Order’s **“Order History”**. In addition to this, if you have so instructed PIMS to do so, these Comments are added to the Order line-items as remarks.

The ShopSite “Order Instructions” are placed in the Order’s **“Order History”**. In addition to this, if you have so instructed PIMS to do so, these Instructions are added to the Order line-items as remarks.

Other random ShopSite fields are added to the Order’s **“Order History”** as well. Please check it out.

IMPORTING ORDER LINE-ITEMS:

When PIMS loads a downloaded Order line-item onto an Order, it first creates a blank line-item.

PIMS will then check to see if the ShopSite **“SKU”** matches a PIMS **Part Code**. If so, it’s loaded. If not, PIMS will still load it to the Order with all its information, except the Part Code will obviously be blank. It’s up to you to correct this line-item in PIMS and add the missing Inventory item into the system. PIMS will show you the missing SKU, as part of the line-item Description:

	PART#	PRODUCT DESCRIPTION	QTY	SHP'D	DISC%	NT	PRICE	EXTENDED	
001		PART#: DSM2 Programmer Sunglasses MARGIN: ---, MARK-UP: ---, PROFIT: \$79.99	1 None	1 0	0% PC: <input type="text"/>	<input type="checkbox"/>	\$79.99 No Cost Overridden	\$79.99	
002	DC SW CSTUFF	Dim City Game MARGIN: 20.0%, MARK-UP: 25.0%, PROFIT: \$25.00	1 None	1 0	0% PC: <input type="text"/>	<input type="checkbox"/>	\$125.00 \$100.0000 Overridden	\$125.00	

The product **“Description”** and **“Price”** will be the ones downloaded from ShopSite, and not the ones loaded from the associated Inventory record. Again, this is so the Order matches ShopSite, and avoids Customer confusion.

Any “Customer Text” or “Selected Option” from ShopSite is added to the line-items **“Memo”** field:

USER MEMO:
Brown Lenses PIMS Development Group

In the above example, “Brown Lenses” was the “Selected Option” and “PIMS Development Group” was specified as Custom Engraving.

If “<GiftCertificatePurchase>” information is downloaded from ShopSite, it too is placed in the Order line-item “**Memo**” field.

OTHER NOTEWORTHY ORDER FUNCTIONS:

If a credit card is processed by ShopSite, and no “Authorization” code is returned, then PIMS will put “WEB” as the Authorization code.

We talked about associating a Department with WEB sales. Here’s what a **Sales Journal** entry might look like:

ACCOUNT#:	ACCOUNT DESCRIPTION:	DEBIT:	CREDIT:
10050-000-000	Cash Drawer (Undeposited Funds)	\$223.44	
40100-999-000	Income From WEB Sales		\$204.99
50100-999-000	WEB Order Cost-Of-Goods	\$100.00	
12500-000-000	Inventory		\$100.00
20030-000-000	Sales Tax Payable		\$18.45

If for some reason you would need to manually download and import ShopSite orders into PIMS, because your Internet is down and PIMS can’t access it, you can download the Orders from a different place and bring the file to PIMS (actually any PIMS terminal you have access to).

To do this, go to your ShopSite Back Office, and select “**Download Orders**” from the “**Orders**” menu:

Orders Download

Download format

☐ Tab-delimited text file format

☒ XML text file format

☐ QuickBooks® import file format

select version

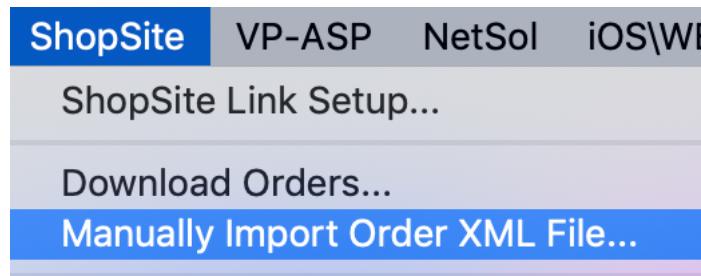
version 14.0

[XML DTD reference](#)

Configure

Make sure it's in "**XML**" format, and "**Version 14**". There are other parameters for selecting which Orders to download. We'll leave that to you.

Once you have the downloaded file (defaults to "Orders.xml"), then go to the **WEB Services Module** and select "**Manually Import Order XML File...**" from the "**ShopSite**" menu:



This will import and process those ShopSite Orders in the exact same manner as if PIMS had done it itself.

As you can see from the menu graphic above, you can manually download ShopSite Orders from here as well.

HOW PIMS CAN HANDLES ORDERING OPTIONS MENU:

When you'd like to offer product types for the same product, like our Programmer's Sunglasses, be sure you have an Inventory record for each "Option". For example, for the Glasses on our sight, we have Brown ones and Black ones as options:



Programmer Sunglasses

\$79.99

Reg. Price \$299.00 You Save \$219.01

This is the DESCRIPTION

✓ Black Lenses
Brown Lenses

When you set this product up in ShopSite (yes, this one should be created manually in ShopSite to begin with), be sure and associate a PIMS **Part Code** with each version (option):

Ordering Options

Ordering options will appear in the shopping cart. For help, click the help menu at the top of this page.

Order Options
Description

Pull-down Menus

Black Lenses
Brown Lenses

Basic Options

Clicking 'Basic Options' will delete ALL information entered in the Pull-down Menu fields below.

- ☐ Use Cascading Menus (Note: Menus will display only on More Info pages.)
- ☐ Append the Option SKU to the Product SKU

Text before option descriptions (e.g. 'Choose' or 'Select')

Use	Delete	Lens Colo	Append Text	SKU	Price Mod.	Weight Mod.	Qty on Hand	Low Stock	Out of Stock	GTIN/UPC
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Black Lenses		DSM					
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Brown Lenses		DSM2					
Add Rows										

In this case, the default color of “Black” has a PIMS Part Code (SKU) of “DSM”. The “Brown” one is “DSM2”.

	PART#	PRODUCT DESCRIPTION	QTY	SHP'D	DISC%	NT	PRICE	EXTENDED	
001	DSM	Programmer Sunglasses Black Lenses	1	1	0%	<input type="checkbox"/>	\$71.9908 \$100.0000 Overridden	\$71.99	
	HW	MARGIN: , MARK-UP: , PROFIT: -\$28.01	None	0	PC: <input type="text"/>				<input type="checkbox"/>
002	DSM2	Programmer Sunglasses Brown Lenses	1	1	0%	<input type="checkbox"/>	\$71.9908 \$100.0000 Overridden	\$71.99	
	HW	MARGIN: , MARK-UP: , PROFIT: -\$28.01	None	0	PC: <input type="text"/>				<input type="checkbox"/>

If your company has any special requirements beyond what is currently coded in PIMS, custom plug-ins can always be developed for you, for a fee.

This concludes this Tech Note.

ADDENDUM #1

4/15/19 11:53:49 AM
v17.1.1.6

We’ve now added processing for the ShopSite “On Sale Price” in PIMS.

To activate the “On Sale Price” in ShopSite, go to an Inventory record, select “**Additional Data For WEB...**” from the “**WEB**” menu, enter a price in the “**SPECIAL WEB PRICE**” amount, and click the new “**Use 'SPECIAL WEB PRICE' As 'On Sale Price' In ShopSite**” checkbox:

SPECIAL WEB PRICE:

☒ Use 'SPECIAL WEB PRICE' As 'On Sale Price' In ShopSite

This will activate that Sale Price on the associated ShopSite WEB pages:



Paris Works

~~\$50.00~~ **\$39.95***

ADD TO CART

Here is an example of the various pricing schemes available:

No Special Pricing (PIMS Inventory **"PRICE"** Field):



Paris Works

\$50.00*

ADD TO CART

Special WEB Price entered, but checkbox is not checked:

SPECIAL WEB PRICE:	
<input type="text" value="\$49.95"/>	<input type="checkbox"/> Use 'SPECIAL WEB PRICE' As 'On Sale Price' In ShopSite



Paris Works

\$49.95*

ADD TO CART

Here is a default WEB Customer Price Code of "A", which is a 50% discount for this item:
** Special WEB Price is zero...



Paris Works

\$25.00*

ADD TO CART

Here is a default WEB Customer Price Code of "A", which is a 50% discount for this item, and a Special WEB Price of \$19.95 (checkbox not checked):



Paris Works

\$19.95*

ADD TO CART

Here's the exact same thing as above, except the "Use 'SPECIAL WEB PRICE' As 'On Sale Price' In ShopSite" checkbox is checked:

SPECIAL WEB PRICE:

\$19.95	<input checked="" type="checkbox"/> Use 'SPECIAL WEB PRICE' As 'On Sale Price' In ShopSite
---------	--



Paris Works

~~\$25.00~~ \$19.95*

ADD TO CART

You'll notice that in this scenario, the regular Price was set to a 50% discount down to \$25.00 from \$50.00 from Customer Price Code "A", and then a Special WEB Price was issued on top of that.

Conclusion of this addendum