



# V200 Commerce Edition (BigCommerce Connector)

Ksenia Burtseva

Business Analyst

# Timing and Agenda

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**July 10, 2023 10 AM - 11:30 AM**

**Day 1**

**Lesson 1.1: Initial Configuration**

**Lesson 1.2: Manual Synchronization**

**July 11, 2023 10 AM - 11:30 AM**

**Day 2**

**Lesson 2.1: Synchronization of Customers and Customer Locations**

**Lesson 3.1: Synchronization of Stock Items and Non-Stock Items**

**Lesson 3.2: Synchronization of Images**

# Timing and Agenda

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**July 12, 2023 10 AM - 11:30 AM**

**Day 3**

**Lesson 3.3: Synchronization of Product Availability**

**Lesson 3.4: Synchronization of Sales Prices**

**Lesson 4.1: Import of Card Payments  
(Authorize.Net)**

**Lesson 4.2: Payments with Gift Certificates**

**July 13, 2023 10 AM - 11:30 AM**

**Day 4**

**Lesson 4.3: Import of an Order with Discounts**

**Lesson 4.4: Synchronization of Taxes**

**Lesson 5.1: Automating the Synchronization of  
Entities**

**Lesson 5.2: Monitoring Day-to-Day Commerce  
Operations**



Part 1: Initial Configuration and Manual Synchronization

Part 2: Synchronization of Customers and Customer Locations

Part 3: Synchronization of Products

Part 4: Synchronization of Orders

Part 5: Scheduling Synchronization and Troubleshooting

# Company Story

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## Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- **SweetLife Head Office and Wholesale Center:** This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- **SweetLife Store:** This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse. This branch is also planning on selling goods via a website created on an e-commerce platform to accept orders online. The e-commerce integration project is underway.
- **Service and Equipment Sales Center:** This branch is a service center with a small warehouse where juicers are stored. This branch assembles juicers, sells juicers, installs juicers, trains customers' employees to operate juicers, and provides juicer servicing.

# Company Story

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## Operational Activity

The company has been operating starting in the 01-2022 financial period. In November 2022, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. The equipment center has begun its operations in 01-2023 in response to the company's growth.

The base currency of the company and its subsidiaries is the U.S. dollar (USD). All amounts in documents and reports are expressed in U.S. dollars unless otherwise indicated.

# Company Story

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## SweetLife Company Sales and Services

Each SweetLife company's branch has its own business processes, as follows:

- **SweetLife Head Office and Wholesale Center:** In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafes. The company also conducts home canning training at the customer's location and webinars on the company's website.
- **SweetLife Store:** In the store, retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).
- **Service and Equipment Sales Center:** This branch assembles juicers, sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services. The branch performs one-time endeavors as well as complex projects with their own budgets.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).

Day 1



# Lesson 1.1: Initial Configuration

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## Learning Objectives

In this lesson, you will learn about the following:

- General steps involved in establishing a connection between Acumatica ERP and the BigCommerce store and in performing the initial configuration of these systems.

# Initial Configuration: To Set Up a BigCommerce Store

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The SweetLife company is planning on opening an online store built on the BigCommerce platform. The store's warehouse, from which the goods sold online will be shipped, is based in New York. The company maintains the prices of its products in U.S. dollars and delivers products across New York by using the company's own vehicles. For orders in the amount of \$100 and more, the company offers free shipping.

As an implementation consultant helping SweetLife to implement the integration between BigCommerce and Acumatica ERP, you want to set up a new store and perform the minimum required configuration of the BigCommerce store that will be sufficient to proceed with the configuration of the integration.

# Initial Configuration: To Establish and Configure the Store Connection

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Suppose that the manager of the SweetLife company wants to sell jam in its online store deployed on the BigCommerce platform. SweetLife is already using Acumatica ERP and now needs to integrate it with a new BigCommerce store. As SweetLife's implementation consultant, you need to configure the connection to the BigCommerce store and perform the minimum configuration required for synchronization of data between Acumatica ERP and the BigCommerce store.

# Lesson 1.2: Manual Synchronization

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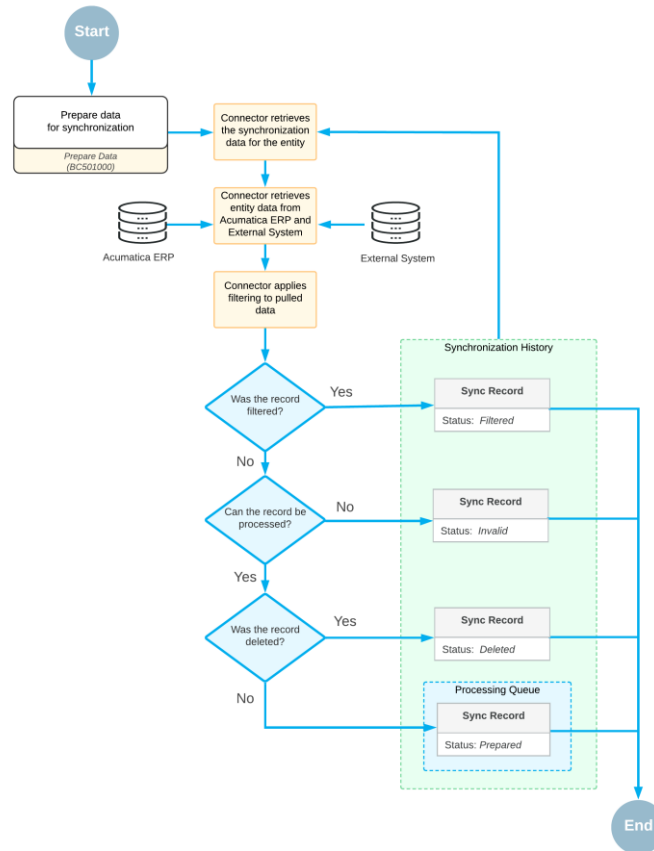
## Learning Objectives

In this lesson, you will learn about the following:

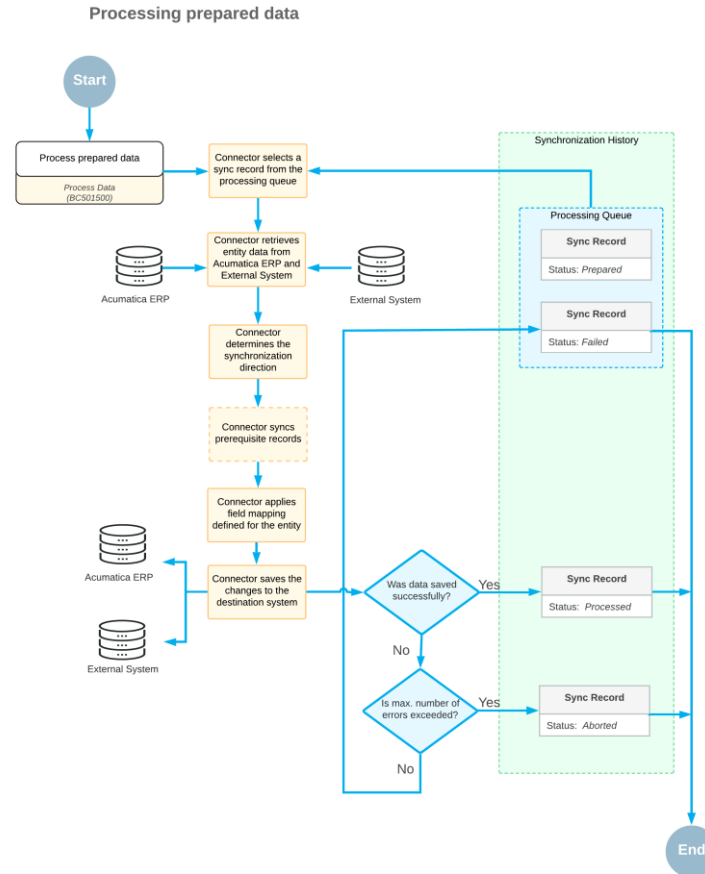
- How to define export and import filtering settings.

# Figure: Preparing data for synchronization

Preparing data for synchronization



# Figure: Processing prepared data



# Data Synchronization: To Perform the First Synchronization

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Suppose that you are an implementation consultant helping the SweetLife Fruits & Jams company to set up an online store. You have completed the minimum initial configuration of the integration with BigCommerce and now want to explore how synchronization works. You will configure synchronization for and then synchronize a subset of stock items that are maintained in Acumatica ERP (stock items of the Jam item class) with the BigCommerce store, where the term products describes what are called items in Acumatica ERP. You will then perform a test purchase of one of the synchronized products and explore how the online order is processed in the BigCommerce store and in Acumatica ERP.

# Figure: Stock item synchronization records prepared for processing

Sync History

CUSTOMIZATION TOOLS ▾








🔄 📄 ↶ **SYNC** |🔍 🗑️ ⌵ ⋮


Store:		SweetStore - BC											
Entity:		Stock Item											
ALL RECORDS													
READY TO PROCESS													
FAILED													
PROCESSED													
SKIPPED													
ABORTED													
DELETED													
FILTERED													
INVALID													
INACTIVE													
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entity	Store	ERP ID	External ID	External Description	Status	Last Error	Last Operation	Last Attempt	Attempt Count	Active
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">STRAWJAM32_Strawberry jam 32 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">RASPJAM32_Raspberry jam 32 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">PLUMJAM96_Plum jam 96 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">PLUMJAM32_Plum jam 32 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">PLUMJAM08_Plum jam 8 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">PEARJAM96_Pear jam 96 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">PEARJAM08_Pear jam 8 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">ORJAM96_Orange jam 96 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">ORJAM32_Orange jam 32 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">ORJAM08_Orange jam 8 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">LEMJAM96_Lemon jam 96 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">LEMJAM32_Lemon jam 32 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">LEMJAM08_Lemon jam 8 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Stock Item</a>	<a href="#">SweetStore - BC</a>	<a href="#">KIWIJAM96_Kiwi jam 96 oz</a>			Prepared		Modified in ERP	4/25/2023 2:22 PM	0	<input checked="" type="checkbox"/>



# Figure: The synchronization records created during the import of the sales order










Sync History CUSTOMIZATION TOOLS ▾

   **SYNC**    

Store:  

Entity:

ALL RECORDS READY TO PROCESS FAILED **PROCESSED** SKIPPED ABORTED DELETED FILTERED INVALID INACTIVE

			<input type="checkbox"/>	Entity	Store	ERP ID	External ID	External Description	Status	Last Error	Last Operation
>			<input type="checkbox"/>	<a href="#">Payment</a>	<a href="#">SweetStore - BC</a>	<a href="#">Prepayment_000075</a>	<a href="#">100.6533...</a>	100	Processed		Inserted in ERP
			<input type="checkbox"/>	<a href="#">Sales Order</a>	<a href="#">SweetStore - BC</a>	<a href="#">EO_000071</a>	<a href="#">100</a>	100	Processed		Inserted in ERP
			<input type="checkbox"/>	<a href="#">Customer</a>	<a href="#">SweetStore - BC</a>	<a href="#">C000000001_Larry.Coleman</a>	<a href="#">1</a>	<a href="#">larry@example.com</a>	Processed		Inserted in ERP

# Figure: Sales order imported from the store

Sales Orders

EO 000071 - Larry Coleman

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD

\* Order Type: EO \* Customer: C000000001 - Larry Coleman Ordered Qty.: 5.00  
 Order Nbr.: 000071 \* Location: MAIN - Primary Location Discount Total: 0.00  
 Status: Open Contact: Larry Coleman Tax Total: 0.00  
 \* Date: 4/25/2023 \* Project: X - Non-Project Code. Order Total: 225.75  
 \* Requested On: 4/25/2023 Description: SweetStore - BC | Order: 100 | Status: Awaiting Fulfillment  
 Customer Ord...  
 External Refer... 100 - SweetStr

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS RELATIONS TOTALS

	+		X	ADD ITEMS	ADD MATRIX ITEMS	ADD INVOICE	ADD BLANKET SO LINE	LINE DETAILS	PO LINK	ITEM AVAILABILITY		
* Branch	* Inventory ID	Free Item	Warehouse	Line Description	* UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price	
RETAIL	KIWIJAM96		RETAIL	Kiwi jam 96 oz	PIECE	5.00	0.00	5.00	45.1500		225.75	

## Day 2

# Lesson 2.1: Synchronization of Customers and Customer Locations

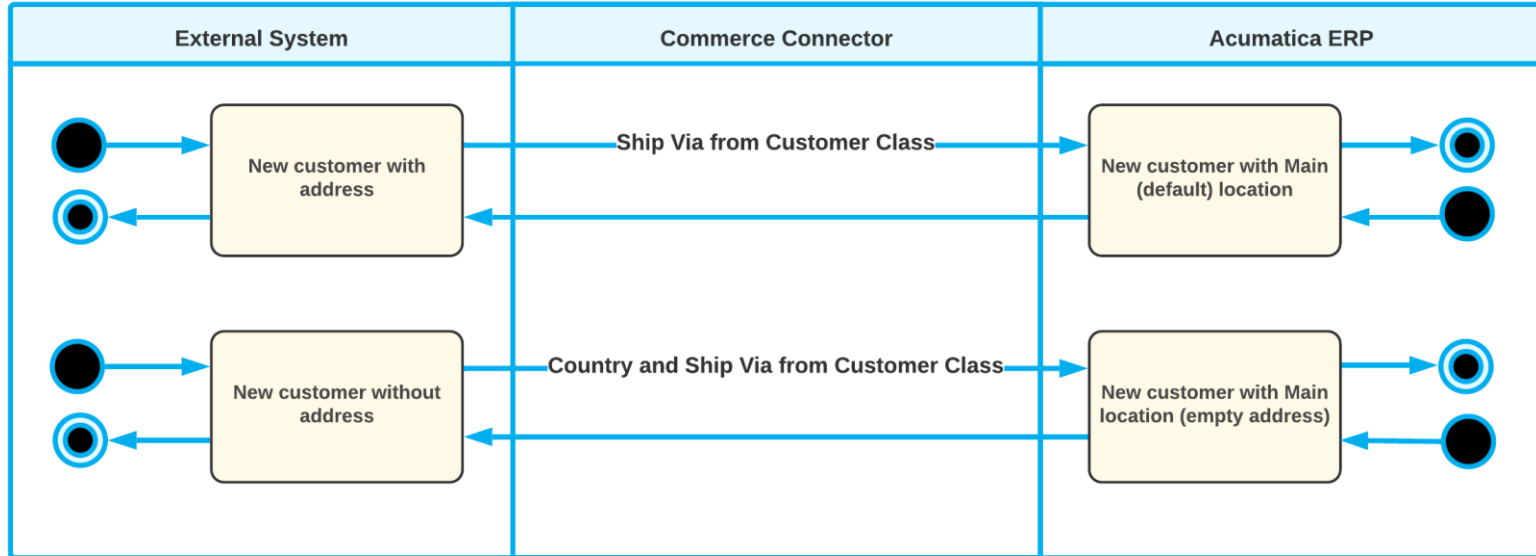
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## Learning Objectives

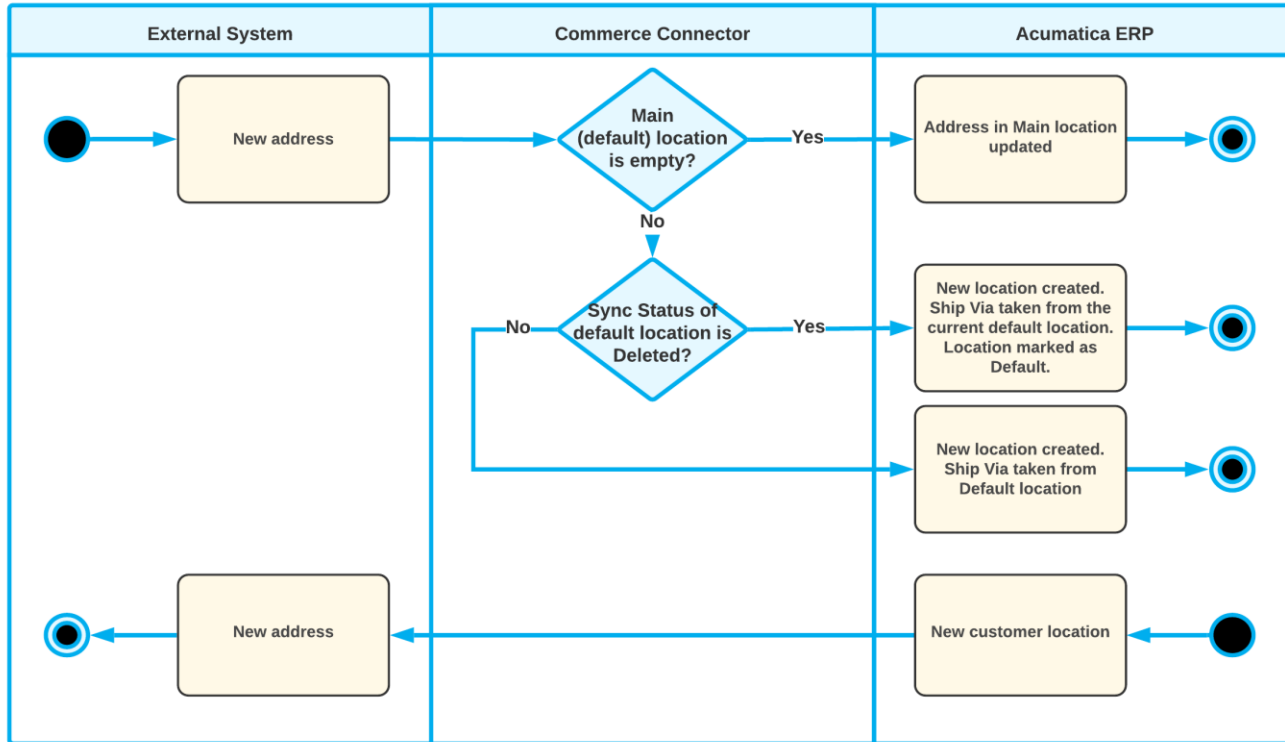
In this lesson, you will learn how to do the following:

- Set up the synchronization of customers and customer locations (addresses) so that they can be both exported to the BigCommerce store and imported from the BigCommerce store to Acumatica ERP.
- Define the filtering of customers based on various conditions.
- Synchronize customers that have multiple locations.

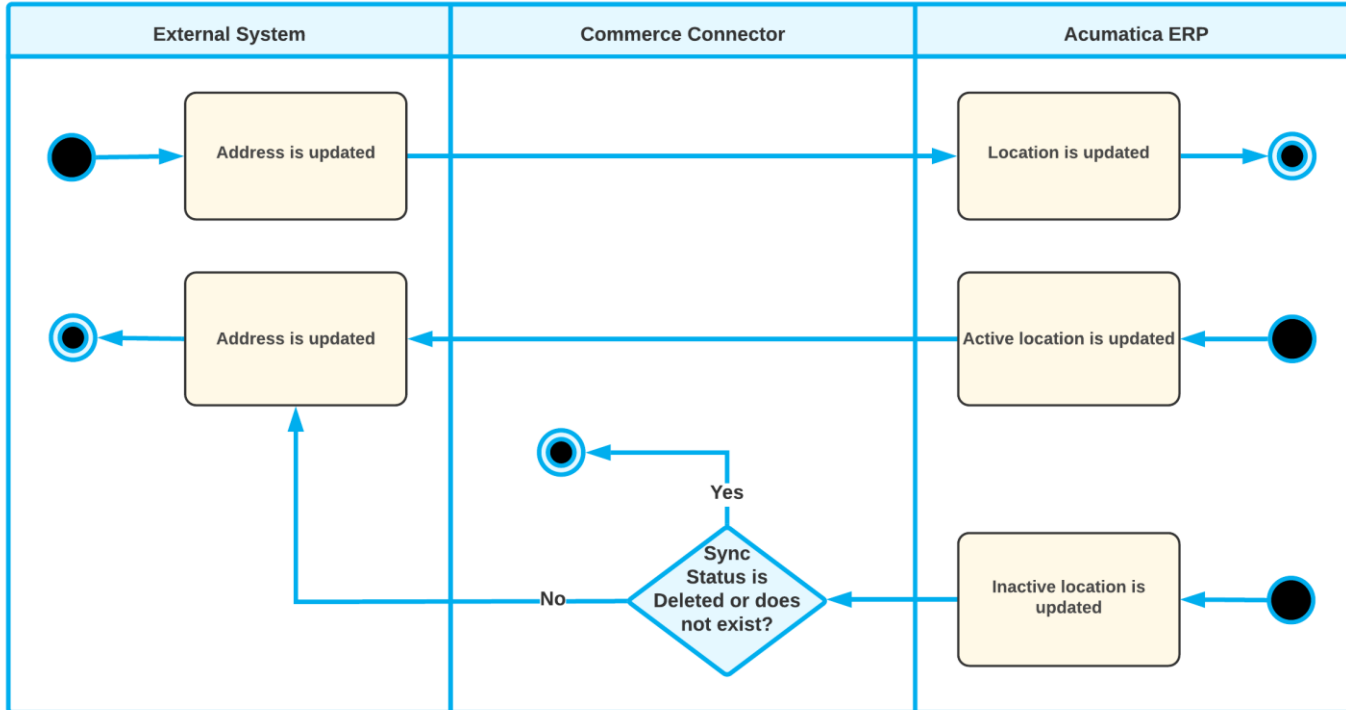
# Figure: Synchronization of customers created without an address



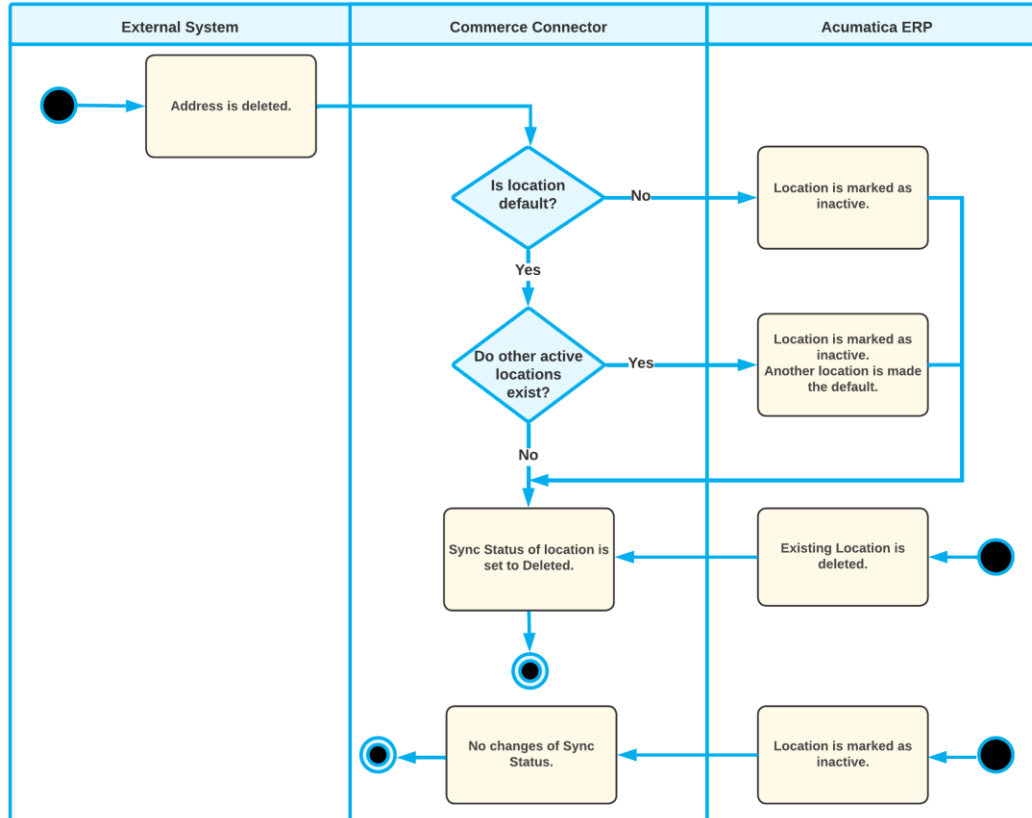
# Figure: Synchronization of a new customer address



# Figure: Synchronization of an updated customer address



# Figure: Synchronization of a deleted customer address





# Synchronizing Customers: To Perform Bidirectional Synchronization

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Suppose that the SweetLife Fruits & Jams company has multiple corporate customers from the United States and Canada in the system. The company management wants customer records for US customers to be exported from Acumatica ERP to the BigCommerce store. At the same time, new customers that place orders in the BigCommerce store should be imported to Acumatica ERP.

Because an email address is a key field for a customer in BigCommerce, customers that do not have it specified in Acumatica ERP will not be saved in the BigCommerce store during the export.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the BigCommerce store, you need to configure the bidirectional synchronization of customers, and configure the filtering conditions to export only records for US customers that have an email specified.

# Figure: Synchronization records for processed customer entities

Sync History

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Store:  Entity:

ALL RECORDS READY TO PROCESS FAILED PROCESSED SKIPPED ABORTED DELETED FILTERED INVALID INACTIVE DRILLDOWN

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entity	Store	ERP ID	External ID	External Description	Status	Last Error	Last Operation	Last Attempt	Attempt Count	Active
>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Customer</a>	<a href="#">SweetStore - BC</a>	<a href="#">JAMIFIQUE_Jamifique factory</a>	<a href="#">169</a>	colleenp_jamifique@example.com	Processed		Inserted Externally	10/19/2022 4:58 AM	0	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Customer</a>	<a href="#">SweetStore - BC</a>	<a href="#">FRUITICO_FRUITICO Coffee a...</a>	<a href="#">168</a>	fruitico_info@example.com	Processed		Inserted Externally	10/19/2022 4:58 AM	0	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Customer</a>	<a href="#">SweetStore - BC</a>	<a href="#">C000000001_Larry Coleman</a>	<a href="#">167</a>	larry@example.com	Processed		Inserted in ERP	10/18/2022 3:16 PM	0	<input checked="" type="checkbox"/>

## Synchronizing Customers: To Synchronize Customers with Multiple Locations

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Suppose that the SweetLife Fruits & Jams company works with corporate customers that order items to be delivered to multiple locations. The company's sales managers keep track of customer addresses by using the customer address book functionality in the BigCommerce store and need the addresses from the BigCommerce store to be in sync with customer locations in Acumatica ERP.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the BigCommerce store, you need to set up the synchronization of customer locations between the two systems, as well as test it and explore how the synchronization works in both systems.

# Figure: Customer locations imported from the store

Customers  
C000000002 - Hoppy Place Coffee and Cakes

← 📄 📄 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩ VIEW ACCOUNT ...

\* Customer ID: C000000002 - Hoppy Place Coffee an 🔍 Balance: 0.00  
\* Customer Status: Active ▾ Prepayment Balance: 0.00  
\* Customer Class: ECCUSTOMER - Online Customers 🔍 ✎ Retained Balance: 0.00

GENERAL FINANCIAL BILLING SHIPPING **LOCATIONS** PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES ACTIVITIES GLA

🔄 + SET AS DEFAULT 📏 🗑️

📄	🔍	📄	Active	* Location ID	Location Name	Default	City	State	Country
>	🔍	📄	<input checked="" type="checkbox"/>	<a href="#">L000000001</a>	Hoppy Wellby	<input type="checkbox"/>	New York	NY	US
	🔍	📄	<input checked="" type="checkbox"/>	<a href="#">MAIN</a>	Hoppy Place Coffee and Cakes	<input checked="" type="checkbox"/>	New York	NY	US

# Lesson 3.1: Synchronization of Stock Items and Non-Stock Items

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Export stock and non-stock items to the BigCommerce store.

## Product Synchronization: To Synchronize Non-Stock Items with Attributes

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Suppose that the SweetLife Fruits & Jams company is going to start selling training courses in a few months. However, it wants to let the shoppers of its online store know when the courses will be available for purchase.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the BigCommerce store, you need to define an attribute for the course availability date and then export this date to the BigCommerce store.

# Figure: The custom attribute shown on the storefront

[Home](#) / [Training](#) / [Home canning courses online \(website session\)](#)

Home canning courses online  
(website session)

\$15.00

★★★★★ (No reviews yet) [Write a Review](#)

SKU:  
ONLCOURSE

Image  
Coming  
Soon

Expected release date is Jan 1st 2024

Quantity:

1

Pre-Order Now

Add to Wish List



# Product Synchronization: To Synchronize Stock Items with Attributes

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Suppose that the SweetLife Fruits & Jams company wants to display the sugar levels of jams it sells in the online store on the product detail pages on the storefront.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the BigCommerce store, you need to define an attribute for the sugar level and then export these sugar levels to the BigCommerce store.



# Figure: The custom attribute shown on the storefront

JAMS   OTHER   SHIPPING & RETURNS   CONTACT US   BLOG

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[Home](#) / [Jams](#) / [Cherry jam 96 oz](#)

## Cherry jam 96 oz

\$45.15

★★★★★ (No reviews yet) [Write a Review](#)

SKU:  
CHERJAM96

UPC:  
CHJ96

Sugar Level:  
Sugar-free

---

Quantity:  
▼ 1 ▲

[Add to Cart](#)   [Add to Wish List](#) ▼

Image Coming Soon

# Lesson 3.2: Synchronization of Images

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Export product images from Acumatica ERP to the BigCommerce store.

# Product Synchronization: To Export Product Images

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Suppose that the SweetLife Fruits & Jams company stores product images in Acumatica ERP as attachments to items. Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the BigCommerce store, you want to set up the export of images stored in Acumatica ERP to the BigCommerce store.

# Figure: Synchronization records for the product images

## Sync History

CU

🔄 📄 ↶ **SYNC** 📏 🗑️ ⚙️ ⋮

Store:  Entity:

ALL RECORDS   READY TO PROCESS   FAILED   **PROCESSED**   SKIPPED   ABORTED   DELETED   FILTERED   INVALID   INACTIVE

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entity	Store	ERP ID	External ID	Status	Last Error	Last Operation	Last Attempt	Attempt Count	Active
>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Product Image</a>	SweetStore...	<a href="#">Stock Items (APJAM08, )App...</a>	258,398	Processed		Updated Externally	4/16/2022 8:04 AM	0	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Product Image</a>	SweetStore...	<a href="#">Stock Items (APJAM08, )App...</a>	258,397	Processed		Updated Externally	4/16/2022 8:04 AM	0	<input checked="" type="checkbox"/>

## Day 2

# Lesson 3.3: Synchronization of Product Availability

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Define how the available quantities of items exported to the BigCommerce store should be calculated
- Set up quantity tracking for stock items exported to the BigCommerce store
- Synchronize the available quantities of exported stock items for which quantity tracking is turned on

# Product Availability: To Export Product Availability Data

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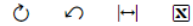
Suppose that the SweetLife Fruits & Jams company sells several kinds of jams in its online store. The jams can be ordered in the online store as follows:

- Banana jams (BANJAM96 and BANJAM08) should always be available for purchase regardless of the quantity in stock.
- Pear jams (PEARJAM96 and PEARJAM08) should be available for purchase only if there is a sufficient quantity in stock. If there is no quantity in stock, the item becomes unavailable for purchase.
- Plum jams (PLUMJAM96 and PLUMJAM08) should be available for purchase when there is sufficient quantity in stock. If there is no quantity in stock, the availability to purchase the item should be determined by the settings specified for the item on the product management page in the BigCommerce store.
- Cherry jam in 96-ounce jars (CHERJAM96) is currently unavailable for purchase but you expect it to be restocked soon and want to accept orders for it regardless of its available quantities. Only the quantities that are available for shipping from the JS1 location in the RETAIL warehouse should be available for purchase in the online store.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the BigCommerce store, you need to configure the system so that the items' availability will be tracked according to the business needs.

# Figure: Quantities of stock items available for shipping

## Storage Details by Item Warehouse Location



Warehouse:

Location ID: Contains 'JS1' ▾

Inventory ID	Warehouse ID	Qty. On Hand in Warehouse	Qty. Available in Warehouse	Qty. Available for Shipping in Warehouse	Qty. Available for Issue in Warehouse	Last Modified Date of Warehouse Qty.	Location ID ▾	Qty. On Hand in Location	Qty. Available in Location	Qty. Available for Shipping in Location	Qty. Available for Issue in Location
> <a href="#">BANJAM08</a>	RETAIL	0.00	0.00	0.00	0.00	6/1/2023	JS1	0.00	0.00	0.00	0.00
<a href="#">BANJAM96</a>	RETAIL	70.00	60.00	60.00	70.00	6/3/2023	JS1	50.00	40.00	40.00	50.00
<a href="#">CHERJAM08</a>	RETAIL	0.00	0.00	0.00	0.00	6/1/2023	JS1	0.00	0.00	0.00	0.00
<a href="#">CHERJAM96</a>	RETAIL	70.00	65.00	65.00	70.00	6/3/2023	JS1	50.00	45.00	45.00	50.00
<a href="#">KIWIJAM08</a>	RETAIL	0.00	0.00	0.00	0.00	6/1/2023	JS1	0.00	0.00	0.00	0.00
<a href="#">KIWIJAM96</a>	RETAIL	70.00	58.00	58.00	70.00	6/3/2023	JS1	50.00	38.00	38.00	50.00
<a href="#">PEARJAM08</a>	RETAIL	0.00	0.00	0.00	0.00	6/1/2023	JS1	0.00	0.00	0.00	0.00
<a href="#">PEARJAM96</a>	RETAIL	70.00	55.00	55.00	70.00	6/3/2023	JS1	50.00	35.00	35.00	50.00
<a href="#">PLUMJAM08</a>	RETAIL	0.00	0.00	0.00	0.00	6/1/2023	JS1	0.00	0.00	0.00	0.00
<a href="#">PLUMJAM96</a>	RETAIL	70.00	62.00	62.00	70.00	6/3/2023	JS1	50.00	42.00	42.00	50.00



# Lesson 3.4: Synchronization of Sales Prices

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## Learning Objectives

In this lesson, you will learn how to do the following:

- Synchronize base sales prices between Acumatica ERP and the BigCommerce store.

## Price Synchronization: To Export Base Prices

---

Suppose that SweetLife Fruits & Jams wants to maintain all of its sales prices, including the prices of products sold in the BigCommerce store, in Acumatica ERP.

SweetLife's pricing manager has added a new base price for 96-ounce jars of pear jam (\$45) and the following quantity-specific prices for 96-ounce jars of banana jams:

- From 1 to 4 pieces: \$45
- From 5 to 9 pieces: \$43
- More than 9 pieces: \$40

The new prices are effective as of July 1, 2022.

As an implementation consultant, you want to export the effective sales prices for the jams from Acumatica ERP to the BigCommerce store.

# Figure: Base prices and default price specified for the item

← Pear jam 96 oz [🔗](#) 4 of 19 < >

**PRODUCT INFORMATION**

- Basic Information
- Description
- Images & Videos
- Product Identifiers
- Pricing**
- Inventory

**PRODUCT OPTIONS**

- Variations
- Customizations

**STOREFRONT**

- Storefront Details
- Custom Fields

## Pricing

Default Price \* (excluding tax)  
\$ 45.15

Tax Class [?](#)  
Default Tax Class

Tax Provider Tax Code [?](#)  
IMPERIAL-LUXURY-TAX-01

▼ Hide Advanced Pricing

Cost  
\$ 0

MSRP  
\$ 0

Sale Price  
\$ 45.00

# Lesson 4.1: Import of Card Payments (Authorize.Net)

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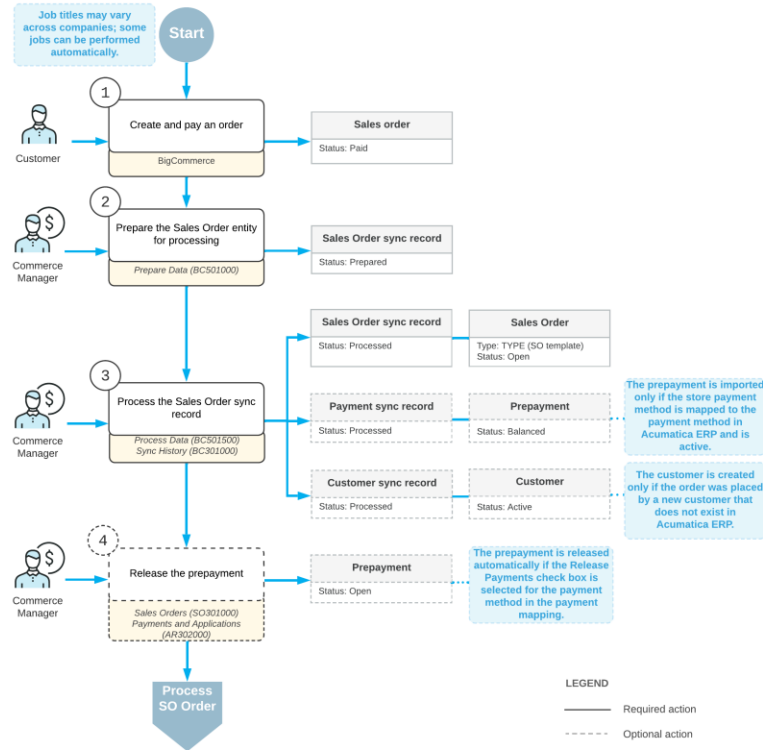
## Learning Objectives

In this lesson, you will learn how to do the following:

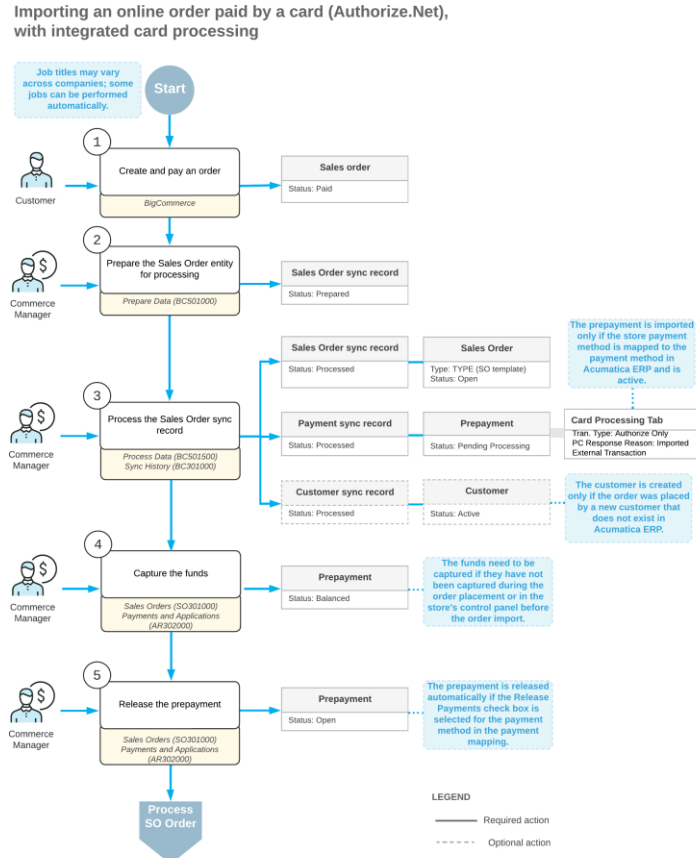
- Configure the synchronization of orders between Acumatica ERP and the BigCommerce store
- Configure the synchronization of payments between Acumatica ERP and the BigCommerce store
- Import sales orders with payments from the BigCommerce store to Acumatica ERP
- Configure the card payment processing in Acumatica ERP and BigCommerce

# Figure: Workflow of Importing a Sales Order with a Manual Payment

Importing an online order paid by a manual payment method or card payment method without integrated card processing



# Figure: Workflow of Importing Payments Based on Credit Cards (Authorize.Net)



# Order Synchronization: To Configure and Import Authorize.Net Payments

---

Suppose that the SweetLife Fruits & Jams company wants to accept card payments in the BigCommerce store. The company already has the Authorize.Net account for processing card payments.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the BigCommerce store, you need to configure Authorize.Net as a card payment provider in the BigCommerce store, configure the card payment processing in Acumatica ERP, and then configure the import of card payments from the BigCommerce store to Acumatica ERP.

At this stage of the implementation, you need to create only one payment method to record all imported card payments.

# Figure: The prepayment applied to the order

Sales Orders  
EO 000065 - eCommerce Guest Customer

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD ...

\* Order Type: EO \* Customer: ECOMGUEST - eCommerce Guest C... Ordered Qty.: 3.00  
 Order Nbr.: 000065 \* Location: MAIN - Primary Location Discount Total: 0.00  
 Status: Open Contact: VAT Exempt T...: 0.00  
 \* Date: 4/17/2022 \* Project: X - Non-Project Code. VAT Taxable T...: 0.00  
 \* Requested On: 4/17/2022 Tax Total: 0.00  
 Customer Ord... Order Total: 135.45  
 External Refer...: 117 - SweetStc Description: SweetStore - BC | Order: 117 | Status: Awaiting Payment

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS **PAYMENTS** TOTALS

CREATE PAYMENT CREATE PREPAYMENT CAPTURE VOID CARD PAYMENT IMPORT CARD PAYMENT Active

Doc. Type	Reference Nbr.	Applied To Order	Transferred to Invoice	Balance	Status	Payment Ref.	Payment Method	Cash Account	Payment Amount	Currency	Proc. Status
Prepayment	000075	135.45	0.00	0.00	Pending Processing	60191424511	ALLCARDS	10250ST	135.45	USD	Pre-Authorized

Not Released: 0.00  
 Authorized: 135.45  
 Released: 0.00  
 Total Paid: 135.45  
 Total Transferr...: 0.00  
 Unpaid Balance: 0.00  
 Unbilled Balan...: 135.45



# Lesson 4.2: Payments with Gift Certificates

---

## Learning Objectives

In this lesson, you will learn how to do the following:

- Create gift certificates so that you can sell them in the BigCommerce store
- Set up a payment method to use gift certificate balance to pay orders placed in the BigCommerce store

## Gift Certificates: Process Activity

---

Suppose that a sales manager of SweetLife wants to give its online customers the ability to purchase gift certificates and use these certificates when purchasing goods in the SweetLife online store. You also want to track payments made with gift certificates in Acumatica ERP by using a dedicated payment method.

As an implementation consultant, you need to set up a non-stock item that will be used to record a sale of a gift certificate as well as a payment method that will be used to track payments made with gift certificates.

# Figure: The BigCommerce order with the gift certificate

	Date	Order ID	Customer	Status	Total	Action
	17th Apr 2022	118	Melody Keys (Guest)	Awaiting Payment	\$25.00	...

Billing		Digital	
<a href="#">Copy</a>	Melody Keys 3402 Angus Road New York, New York 10003	These items are downloadable and will be sent to the customer once the order is marked as 'Completed'.	1 item
United States			
melody@example.com			1 x \$25.00 Gift Certificate
17 Apr 2022 10:52:14			
Authorize.Net			
<a href="#">Capture Funds</a>			

Subtotal	\$25.00
Tax	\$0.00
<b>GRAND TOTAL</b>	<b>\$25.00</b>

# Figure: The prepayment and the gift certificate applied to the order

Sales Orders

EO 000070 - eCommerce Guest Customer

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD

\* Order Type: EO \* Customer: ECOMGUEST - eCommerce Guest Customer Ordered Qty.: 3.00  
 Order Nbr.: 000070 \* Location: MAIN - Primary Location Discount Total: 0.00  
 Status: Open Contact: Tax Total: 0.00  
 \* Date: 10/21/2022 \* Project: X - Non-Project Code. Order Total: 135.45  
 \* Requested On: 10/21/2022 Description: SweetStore - BC | Order: 294 | Status: Awaiting Payment  
 Customer Ord...  
 External Refer... 294 - SweetSt

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS RELATIONS TOTALS

CREATE PAYMENT CREATE PREPAYMENT CAPTURE VOID CARD PAYMENT SORT CARD PAYMENT Active

Doc. Type	* Reference Nbr.	Applied To Order	Transferred to Invoice	Balance	Status	Payment Ref.	Payment Method	Cash Account	Payment Amount	Currenc	Proc. Status
Prepayment	000079	110.45	0.00	0.00	Pending Processing	40105177749	ALLCARDS	10250ST	110.45	USD	Pre-Authorized
Prepayment	000080	25.00	0.00	0.00	Balanced	567904023	GIFTCARDS	10250ST	25.00	USD	

Not Released: 25.00  
 Authorized: 110.45  
 Released: 0.00  
 Total Paid: 135.45  
 Total Transferr...: 0.00  
 Unpaid Balance: 0.00  
 Unbilled Balan...: 135.45

## Day 3

# Lesson 4.3: Import of an Order with Discounts

---

## Learning Objectives

In this lesson, you will learn how to do the following:

- Set up the import of sales orders with discounts from the BigCommerce store to Acumatica ERP.

# Import of Orders with Discounts: Process Activity

---

Suppose that SweetLife decided to offer discounts for some of the products that the company sells in its BigCommerce store. Starting from today, the company provides the following discounts:

- An extra gift item for purchases of 96-ounce jar of banana jam
- A 10 percent discount on purchases of 96-ounce jar of plum jam
- A 5 percent discount on orders of \$100 or more

As SweetLife's implementation consultant, you need to define these discounts in the BigCommerce store and make sure that orders that contain discounts or items with discounts are imported to Acumatica ERP with the discounts applied correctly.

# Figure: The discounts imported from the store

Sales Orders

EO 000067 - Hoppy Place Coffee and Cakes

NOTES ACTIVITIES FILES CUSTOMIZATIONS

...

\* Order Type: EO \* Customer: C000000002 - Hoppy Place Coffee and Cakes Ordered Qty.: 4.00  
 Order Nbr.: 000067 \* Location: L000000001 - Hoppy Wellby Discount Total: 15.80  
 Status: Open Contact: Isabelle Bober VAT Exempt Total: 0.00  
 \* Date: 4/17/2022 \* Project: X - Non-Project Code VAT Taxable Total: 0.00  
 \* Requested On: 4/17/2022 Tax Total: 0.00  
 Customer Order: Order Total: 119.50  
 External Reference: 120 - SweetStore Description: SweetStore - BC | Order: 120 | Status: Awaiting Fulfillment

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS TOTALS

Disable Automatic Discount Update

Skip Discount	LineNbr	*Discount Code	*Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Discount Percent	Free Item	Free Item Qty.	External Discount Code	Description
<input type="checkbox"/>	1			External Document	<input checked="" type="checkbox"/>	135.30		15.80	11.677753			Manual	Discounts applied: 5, 6, 4



# Lesson 4.4: Synchronization of Taxes

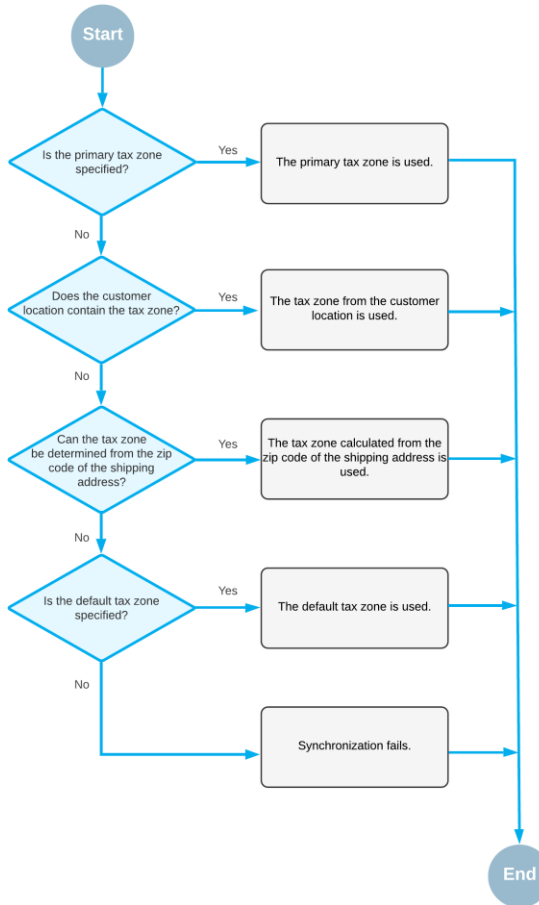
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## Learning Objectives

In this lesson, you will learn how to do the following:

- Set up tax synchronization if you collect tax on products you sell in the BigCommerce store.

# Figure: Determining the tax zone for tax calculation



## Import of Taxes: Process Activity

---

Suppose that SweetLife is using only Acumatica ERP (without an external tax provider) for calculating and reporting taxes on the goods and services it sells. As an implementation consultant helping SweetLife to set up a BigCommerce store, you need to set up taxes in the store and then make sure that the taxes on online sales orders are correctly passed to Acumatica ERP when the orders are imported.

# Figure: Sales order with calculated taxes

Sales Orders

EO 000068 - Hoppy Place Coffee and Cakes

NOTES ACTIVITY

🔍 📄 ↶ + 🗑️ 📄 ⏪ < > ⏩
QUICK PROCESS
CREATE SHIPMENT
HOLD ⋮

* Order Type:	EO	* Customer:	C000000002 - Hoppy Place Coffee an	Ordered Qty.:	5.00
Order Nbr.:	000068	* Location:	L000000001 - Hoppy Wellby	Discount Total:	0.00
Status:	Open	Contact:	Isabelle Bober	VAT Exempt T...:	0.00
* Date:	4/17/2022	* Project:	X - Non-Project Code.	VAT Taxable T...:	0.00
* Requested On:	4/17/2022			<b>Tax Total:</b>	<b>20.04</b>
Customer Ord...:				Order Total:	245.79
External Refer...:	121 - SweetStc	Description:	SweetStore - BC   Order: 121   Status: Awaiting Fulfillment		

[DETAILS](#)
[TAXES](#)
[FINANCIAL](#)
[SHIPPING](#)
[ADDRESSES](#)
[DISCOUNTS](#)
[SHIPMENTS](#)
[PAYMENTS](#)
[TOTALS](#)

<span>↶</span> <span>+</span> <span>🔍</span> <span>×</span> <span>ADD ITEMS</span> <span>ADD MATRIX ITEMS</span> <span>ADD INVOICE</span> <span>ADD BLANKET SO LINE</span> <span>LINE DETAILS</span> <span>PO LINK</span> <span>ITEM AVAILABILITY</span> <span>🔍</span> <span>📄</span> <span>⬆️</span>																
		*Branch	*Inventory ID	Free Item	Warehouse	Line Description	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price	Discount Percent	Discount Amount	
>	🔍	📄	RETAIL	<a href="#">KIWIJAM96</a>	<input type="checkbox"/>	RETAIL	Kiwi jam 96 oz	PIECE	5.00	0.00	5.00	45.1500	<input checked="" type="checkbox"/>	225.75	0.000000	0.00

# Lesson 5.1: Automating the Synchronization of Entities

---

## Learning Objectives

In this lesson, you will learn how to do the following:

- Set up automation schedules for data preparation and processing
- Turn on real-time synchronization of entities
- Configure automated synchronization for optimized performance

## Automated Synchronization: To Configure a New Automation Schedule

---

Suppose that as an implementation consultant helping SweetLife to set up integration with BigCommerce, you want to configure continuous synchronization of entities. As part of the setup, you need to configure the system to synchronize new and updated customers between Acumatica ERP and the BigCommerce store once a day (at night). Because Acumatica ERP does not provide any predefined automation schedules for the Customer entity, you will need to create two automation schedules from scratch. The first schedule will prepare the customer data for processing, and the second schedule will start the processing of the prepared data.

## Automated Synchronization: To Turn On Real-Time Synchronization

---

Suppose that as an implementation consultant helping SweetLife to set up integration with BigCommerce, you want to configure continuous synchronization of particular entities. As part of the setup, you need to turn on realtime synchronization of shipments so that they are exported to the BigCommerce store as soon as they are created or updated in Acumatica ERP.

## Automated Synchronization: To Activate a Predefined Business Event

---

Suppose that you have configured the automated import of sales orders from the e-commerce store and want Jerald Stevens, an e-commerce manager of SweetLife, to be notified when the system has failed to process a synchronization record of a sales order too many times (based on the setting specified in the system) and has set its status to Aborted, which excludes the record from synchronization. To make the system send a notification to the ecommerce manager, Jerald Stevens, every time the synchronization of a sales order is aborted, you need to activate a predefined business event that will trigger the sending of an email message to the store administrator every time the status of a synchronization record of a sales order changes to Aborted. You also want to review the notification template to make sure it is sent to the correct recipient and contains the necessary data about the aborted records.



# Lesson 5.2: Monitoring Day-to-Day Commerce Operations

---

## Learning Objectives

In this lesson, you will learn how to do the following:

- Monitor day-to-day e-commerce activities
- Identify synchronization issues and process individual synchronization records that the system failed to process

# Troubleshooting: To Monitor E-Commerce Operations

---

Suppose that you are Jerald Stevens, an eCommerce Manager at SweetLife Fruits & Jams. You start each day by checking the Commerce Sync Monitoring dashboard, which helps you understand how the synchronization of data between Acumatica ERP and the BigCommerce store is going and whether any synchronization issues have occurred that require your attention. While reviewing the synchronization statistics, you notice that some of the synchronization records have not been processed. You need to investigate and fix the issue and then manually resynchronize the failed synchronization records.



Thank you!

Ksenia Burtseva