



Acumatica

The Cloud ERP

V200 Retail Edition (BigCommerce Connector)

Boris Rudi

Senior Business Analyst

Timing and Agenda

October 7, 2024 - 10:00-12:00 PM PT

Day 1

Lesson 1.1: Initial Configuration

Lesson 1.2: Manual Synchronization

October 8, 2024 - 10:00-12:00 PM PT

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 Product Images

Timing and Agenda

October 9, 2024 - 10:00-12:00 PM PT

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

October 10, 2024 - 10:00-12:00 PM PT

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



Day 1

Scott McLaughlin
Acumatica Sponsored Professional Race Car Driver

Company Story

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 and the jam it produces. Warehouse workers perform warehouse operations.
- *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.**
- *SweetLife Service and Equipment Sales Center*: This branch is a service center with a small warehouse where juicers are stored. This branch assembles, sells, installs, and services juicers, in addition to training customers' employees to operate juicers.

Company Story

Operational Activity

- The company has been operating starting in the 01-2023 financial period.
- In November 2023, 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 01-2024 in response to the company's growth.
- The **base currency** of the company and its subsidiaries is the US dollar (**USD**). All amounts in documents and reports are expressed in US dollars unless otherwise indicated.

Company Story

SweetLife Company Sales and Services

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

- *SweetLife Head Office and Wholesale Center*: 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.
- *SweetLife Service and Equipment Sales Center*: This branch assembles juicers, sells juicers, provides training on equipment use. The branch performs short-term service provision.

The company has local and international customers. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).



Part 1: Initial Configuration and Manual Synchronization

Lessons

Lesson 1.1: Initial Configuration

In this lesson, we will learn how to perform the initial configuration of an online store and connect it to an instance of Acumatica ERP.

Lesson 1.2: Manual Synchronization

In this lesson, we will learn how to manually sync data between Acumatica ERP and a BigCommerce store.

Lesson 1.1: Initial Configuration

Learning Objectives

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

- Set up a BigCommerce store
- Obtain the BigCommerce API keys
- Establish the connection to the BigCommerce store

Lesson 1.1: Initial Configuration

The following general steps are performed to connect the Acumatica ERP instance to the BigCommerce store

Step	Details
1. Set up a BigCommerce store	Sign up for a BigCommerce site and perform the store setup.
2. Obtain the BigCommerce API keys	Obtaining of URL of the BigCommerce store followed by /manage API credentials (API path, client ID, and access token).
3. Prepare the Acumatica ERP instance	Specify the numbering sequence and payment methods that will be used for the BigCommerce store, activate features BigCommerce Connector, Retail Commerce on the Enable/Disable Features (CS100000) form.
4. Establish the connection to the BigCommerce store	Configuration of Connection Settings on the BigCommerce Stores (BC201000) form using API credentials.
5. Perform the initial configuration of the store connection	Basic required configuration of the BigCommerce Store (Entity Settings, Customer Settings, Inventory Settings, Order Settings, Payment Settings, Shipping Settings).
6. Configure the entities enabled for synchronization	Setting of the mapping of custom fields for synchronization and synchronization filtering settings on the Entities (BC202000) form.

Initial Configuration: To Set Up a BigCommerce Store

Story

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 Set Up a BigCommerce Store

Process overview

Steps	Details
1. Signing up for a BigCommerce trial account	Register for free BigCommerce trial account using a valid email address.
2. Completing the store profile	Specify such settings as the store name, store address, store country, contact email address, and contact phone
3. Specifying the default currency	Set up the currencies that the store's customers will see.
4. Configuring the shipping rules	Specify the place where you will ship your products from, as well as the shipping zones and shipping rules
5. Turning off notifications about changes to customer accounts	For testing purposes we recommend that you turn off sending email notifications to customers every time their details are changed
6. Deleting existing products and product categories (optional)	Sample products and product categories have been preloaded to the BigCommerce store for demo purposes and can be deleted.

Initial Configuration: To Capture Store Connection Information

Process overview

Steps	Details
1. Obtaining the BigCommerce Store API Credentials	Generate an API account for the BigCommerce store, set up permissions and get API credentials.

Initial Configuration: To Establish and Configure the Store Connection

Story

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 obtain the BigCommerce Store API credentials, configure the connection to the BigCommerce store and perform the minimum configuration required for synchronization of data between Acumatica ERP and the BigCommerce store.

Initial Configuration: To Establish and Configure the Store Connection

Configuration overview for U100 dataset:

- Enable/Disable Features (CS100000) form: the Retail Commerce and BigCommerce Connector features are enabled.
- Customer Classes (AR201000) form: the ECCUSTOMER customer class has been defined.
- Numbering Sequences (CS201010) form: the ECCUSTOMER numbering sequence has been defined,
- Customers (AR303000) form: the ECOMGUEST customer record has been created.
- Non-Stock Items (IN202000) form: the REFUNDAMT non-stock item has been defined.
- Order Types (SO201000) form, the EO - eCommerce Order has been defined based on the SO order template.
- Ship via Codes (CS207500) form: the SWEETSHIP ship via code has been created.
- Cash Accounts (CA202000) form: the 10250ST cash account has been configured for the RETAIL branch and the USD currency.
- Payment Methods (CA204000) form: the ONLINE payment method has been set up with the 10250ST cash account.

Initial Configuration: To Establish and Configure the Store Connection

Process overview

Steps	Details
1. Establishing a Connection with the store	Create a new record on the BigCommerce Stores (BC201000) form and configure the Connection Settings with API credentials
2. Activating the Needed Entities	Set entities as active on the Entity Settings tab of the BigCommerce Stores (BC201000) form
3. Specifying the Customer Settings	Set up Customer class, numbering sequence and guest customer on the Customer Settings tab of the BigCommerce Stores (BC201000) form.
4. Specifying the Order Settings	Set up configuration for Sales orders sync (branch, Order Type, Refund Amount Item) on the Order Settings tab of the BigCommerce Stores (BC201000) form.
5. Specifying the Payment Settings	Map the CUSTOM (CUSTOM) store payment method on the ONLINE ERP payment method on the Payment Settings tab of the BigCommerce Stores (BC201000) form.
6. Specifying the Shipping Settings	Map the Store Shipping Zone New York State to the Ship Via code SWEETSHIP on the Shipping Settings tab of the BigCommerce Stores (BC201000) form.

Lesson 1.2: Manual Synchronization

Learning Objectives

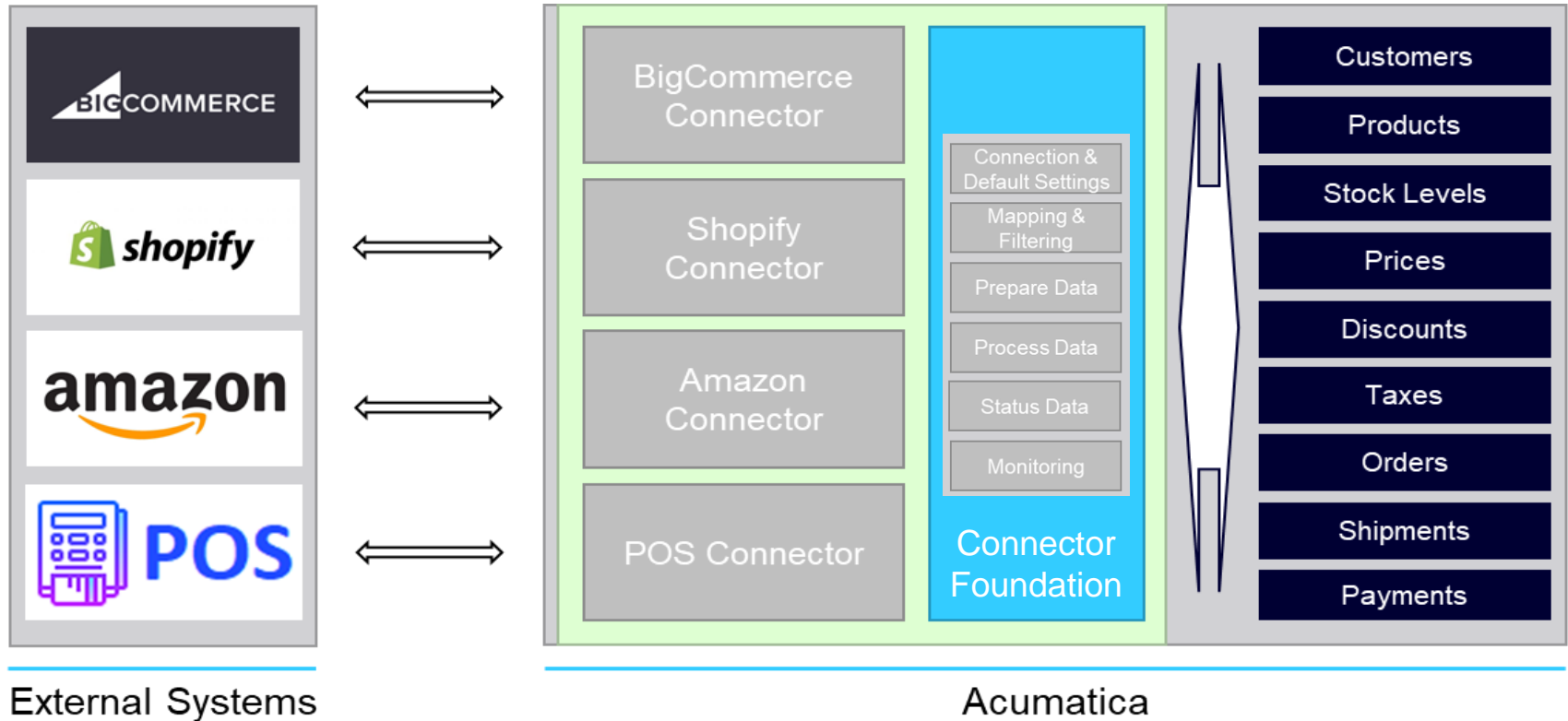
In this lesson, you will learn how to do the following:

- Export and Import Filtering
- Field Mapping
- Perform the First Synchronization

Applicable Scenarios

- During the implementation of the integration between Acumatica ERP and the BigCommerce store, when you test how the synchronization works.
- When you troubleshoot synchronization issues and need to resynchronize specific data manually.

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Preparing Entities for Synchronization

- Export and Import Filtering
- Export and Import Field Mapping

Entities

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Connector:	BigCommerce	Sync Direction:	Export	Real-Time Import:	Not Supported
Store:	V200_Test	Primary System:	ERP	Real-Time Export:	Stopped
Entity:	Stock Item	Max. Number of Failed Attempts:	5	Real-Time Mode:	Prepare

Active

[IMPORT MAPPING](#) | [IMPORT FILTERING](#) | [EXPORT MAPPING](#) | [EXPORT FILTERING](#)

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Data Synchronization: General Information

The process of the synchronization of data between Acumatica ERP and the e-commerce store consists of the following stages:

- **Preparing out-of-sync data for synchronization**

The system receives the data that needs to be synchronized between Acumatica ERP and the e-commerce system and puts it in the processing queue.

- **Processing out-of-sync data**

The system processes the synchronization records in the processing queue according to the synchronization settings defined for the corresponding entity on the Entities (BC202000) form or on the Entity Settings tab of the BigCommerce Stores (BC201000) form, and the synchronized data is saved in Acumatica ERP, in the BigCommerce store, or in both systems.

Preparation of Out-of-Sync Data for Synchronization

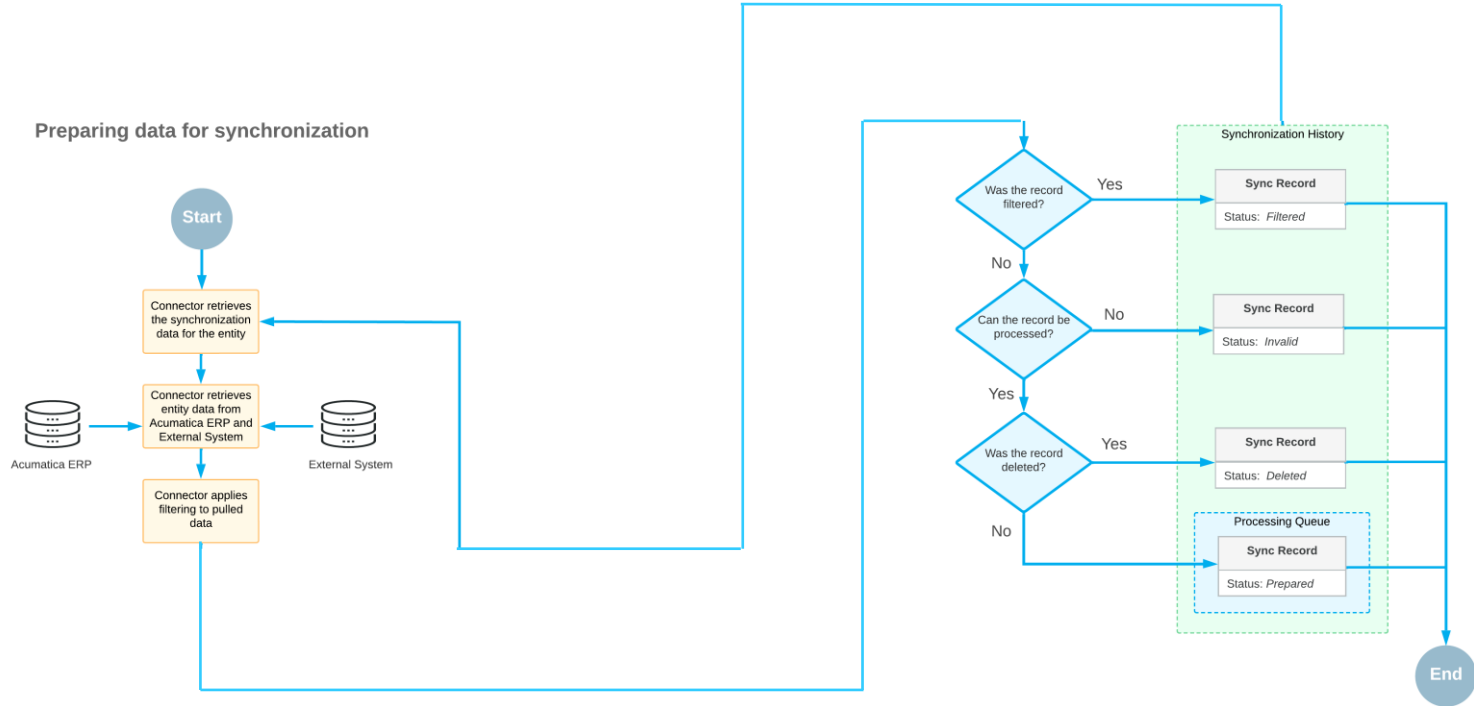
Modes of the data preparation process:

- **Full:** All records that have been created or modified during the specified date range are prepared, regardless of whether they have been processed previously or not. If no range is specified, all records are prepared.
- **Incremental:** Only the records that have been modified since the date of the last successful data preparation are prepared.
- **Incremental by Date:** Only records that have been modified during the specified date range and that have not yet been processed are prepared.

The process can be started:

- **Manually, on the Prepare Data (BC501000) form.**
- **By an automation schedule.**
- **By Push notifications** - If real-time synchronization is enabled for an entity on the Entities (BC202000) form.

Figure: Preparing data for synchronization



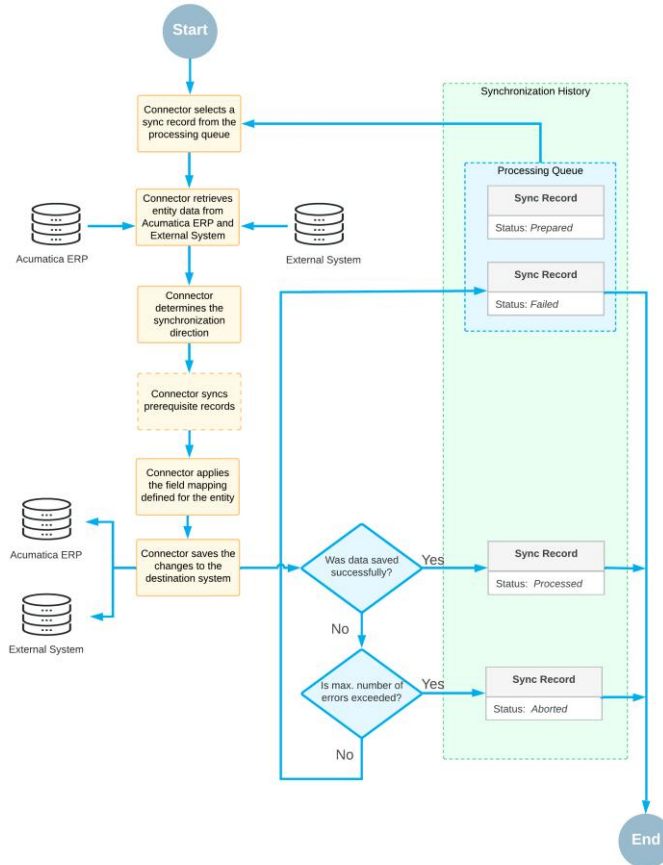
Processing of Out-of-Sync Data

During the data processing stage, the system processes the synchronization records in the processing queue according to the synchronization settings defined for the corresponding entity on the Entities (BC202000) form or on the Entity Settings tab of the BigCommerce Stores (BC201000) form, and the synchronized data is saved in Acumatica ERP, in the BigCommerce store, or in both systems.

The process can be started:

- **Manually**, on the Process Data (BC501500) form.
- **By an automation schedule.**
- **As a result of the real-time synchronization process-** If real-time synchronization is enabled for an entity on the Entities (BC202000) form.

Figure: Processing prepared data



Data Synchronization: Manual Synchronization

Manual synchronization might be useful when you need to synchronize data during the initial configuration or when data has not been synchronized for some reason and manual troubleshooting is needed.

- **To prepare data** – select the store, entity and Prepare mode on the **Prepare Data (BC501000) form** then click Prepare.
- **To process data** – select the store, entity and synchronization records on the **Process Data (BC501500) form** then click Process.

Data Synchronization: To Perform the First Synchronization

Story

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.*
- *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.*

Data Synchronization: To Perform the First Synchronization

Process overview

Steps	Details
1. Review the stock items that need to be exported	On the Stock Items (IN202500) form of Acumatica ERP, review the stock items that need to be exported to the BigCommerce store.
2. Configure the filtering options for the Stock Item entity	On the Entities (BC202000) form, configure the filtering options for the Stock Item entity to include in the synchronization only the stock items of the Jam item class.
3. Start the data preparation process for the Stock Item entity	On the Prepare Data (BC501000) form, start the data preparation process for the Stock Item entity to prepare out-of-sync data for export.
4. Review the result of the data preparation process	On the Sync History (BC301000) form, review the result of the data preparation process.
5. Start data processing for the Stock Item entity	On the Process Data (BC501500) form, start data processing for the Stock Item entity to save the synchronized product data in the BigCommerce store.
6. Review the results of data processing.	On the Sync History form, review the results of data processing.
7. Review data synchronization results	In the BigCommerce store, review the products that have been imported from Acumatica ERP.

Data Synchronization: To Perform the First Synchronization

Process overview (continue)

Steps	Details
8. Place an order in the BigCommerce Store	By using the control panel of the store, place an order for one of the products that have been imported from Acumatica ERP.
9. Start the data preparation process for the Sales Order entity	On the Prepare Data form of Acumatica ERP, start the data preparation process for the Sales Order entity to prepare out-of-sync order data for import; on the Process Data form, synchronize the prepared sales order data.
10. Review the results of data sync	On the Sync History form, review the results of data synchronization.
11. Review the details of the imported sales order	On the Sales Orders (SO301000) form, review the details of the imported sales order.
12. Create a shipment for the imported order	On the Sales Orders form, create a shipment for the imported order, and on the Shipments (SO302000) form, confirm the shipment.
13. Start the data preparation process for the Shipment entity	On the Prepare Data form, start the data preparation process for the Shipment entity; on the Process Data form, synchronize the prepared shipment data.
14. Review the updated order details and the shipment	In the control panel of the BigCommerce store, review the updated order details and the shipment exported from Acumatica ERP.

Figure: Stock item synchronization records prepared for processing

Sync History CUSTOMIZATION TOOLS ▾

Store:

Entity: ▾

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entity	Store	ERP ID	External ID	External Description	Status	Last Message	Last Operation	Last Attempt	Attempts Count	Active
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	STRAWJAM32_Strawberry jam 32 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	RASPJAM96_Raspberry jam 96 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	RASPJAM08_Raspberry jam 08 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	RASPJAM32_Raspberry jam 32 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	PLUMJAM96_Plum jam 96 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	PLUMJAM32_Plum jam 32 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	PLUMJAM08_Plum jam 8 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	PEARJAM96_Pear jam 96 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	PEARJAM32_Pear jam 32 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	PEARJAM08_Pear jam 8 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	PEACHJAM32_Peach jam 32 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	PEACHJAM08_Peach jam 8 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Stock Item	SweetStore - BC	ORJAM96_Orange jam 96 oz			Prepared		Modified in ERP	5/8/2024 1:00 PM	0	<input checked="" type="checkbox"/>

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

Sync History

CUSTOMIZATION TOOLS ▾

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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	External Description	Status	Last Message	Last Operation	Last Attempt	Attempts Count	Active
>	<input type="checkbox"/>	<input type="checkbox"/>	Payment	SweetStore - BC	Prepayment_000077	100.823744701	100	Processed		Inserted in ERP	5/8/2024 3:11 PM	0	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	Sales Order	SweetStore - BC	EO_000073	100	100	Processed		Inserted in ERP	5/8/2024 3:10 PM	0	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	Customer	SweetStore - BC	C000000001_Larry Coleman	1	larry@example.com	Processed		Inserted in ERP	5/8/2024 3:10 PM	0	<input checked="" type="checkbox"/>

Figure: Sales order imported from the store

Sales Orders

EO 000073 - 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.: 000073 * Location: MAIN - Primary Location Detail Total: 225.75

Status: Open Contact: Larry Coleman Line Discounts: 0.00

* Date: 5/8/2024 * Project: X - Non-Project Code. Document Dis... 0.00

* Requested On: 5/8/2024 Description: SweetStore - BC | Order: 100 | Status: Awaiting Fulfillment Freight Total: 0.00

Customer Ord... Tax Total: 0.00

External Refer... 100 - SweetStc Order Total: 225.75

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS RELATIONS TOTALS

ADD ITEMS ADD MATRIX ITEMS ADD INVOICE ADD BLANKET SO LINE LINE DETAILS PO LINK

* 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	<input checked="" type="checkbox"/>	225.75



Day 2



Jessica Korda

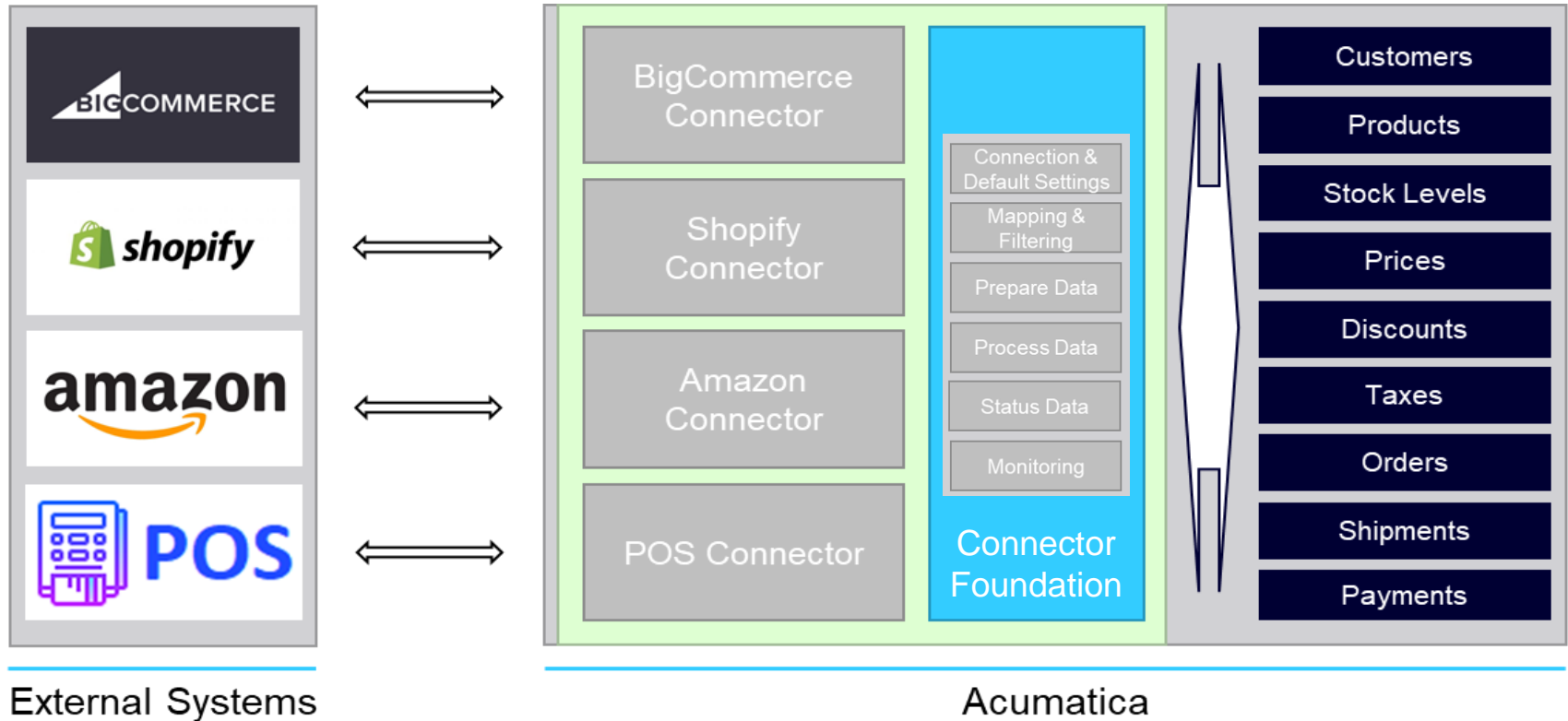
Acumatica Sponsored Professional Golfer

Day 1 Recap

We learned how to do the following:

- Set up a BigCommerce store
- Obtain the BigCommerce API keys
- Establish the connection to the BigCommerce store
- Perform the initial configuration of entities
- Export and Import Filtering
- Field Mapping
- Perform the first synchronization manually

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Lessons

Lesson 2.1: Synchronization of Customers and Customer Locations

This lesson explains how you synchronize customers and customer locations between Acumatica ERP and a BigCommerce store.

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

This lesson explains how you export stock and non-stock items from Acumatica ERP to a BigCommerce store.

Lesson 3.2: Synchronization of Product Images

This lesson explains how you export product images from Acumatica ERP to a BigCommerce store.



Part 2: Synchronization of Customers and Customer Locations

Lesson 2.1: Synchronization of Customers and Customer Locations

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.

Lesson 2.1: Synchronization of Customers and Customer Locations

Applicable Scenarios

- The import of customers can be configured if it is necessary to sync changes to customer information made in the BigCommerce store to Acumatica ERP.
- The synchronization of customers is a prerequisite for the synchronization of orders.
- The export of customers from Acumatica ERP to the BigCommerce store can be configured if records of customers are maintained in Acumatica ERP and details of these customers should be up-to-date in the BigCommerce store.

Synchronization of Customers without Customer Locations

Prerequisites for synchronization of customers between Acumatica ERP and the BigCommerce store:

- Activate Customer Entity on the Entities tab of the **BigCommerce Stores (BC201000)** form,
- Fill in the following boxes on the Customer Settings tab
 - Customer Class
 - Customer Numbering Template
 - Customer Numbering Sequence
 - Generic Guest Customer

Notes:

- If the Customer entity is activated and the Customer Location entity is not activated on the BigCommerce Stores form, the customer location (address) data is not copied from one system to the other.
- When a sales order created in the BigCommerce store is imported, the address information specified in the order is imported to Acumatica ERP as part of sales order data.

Synchronization of Customers with Customer Locations

Prerequisites for synchronization of customer and customer locations between Acumatica ERP and the BigCommerce store:

- **Business Account Locations** feature is enabled on the **Enable/Disable Features (CS100000)** form
- Customer Location Entity is active on the Entities tab of the BigCommerce Stores (BC201000) form
- Fill in the following boxes on the Customer Settings tab
 - Location Numbering Sequence
 - Location Numbering Template

Notes:

- When the Customer entity is synchronized between the BigCommerce store and Acumatica ERP, customer location (address) data is copied from one system to the other along with the customer data.

Figure: Synchronization of customers created without an address

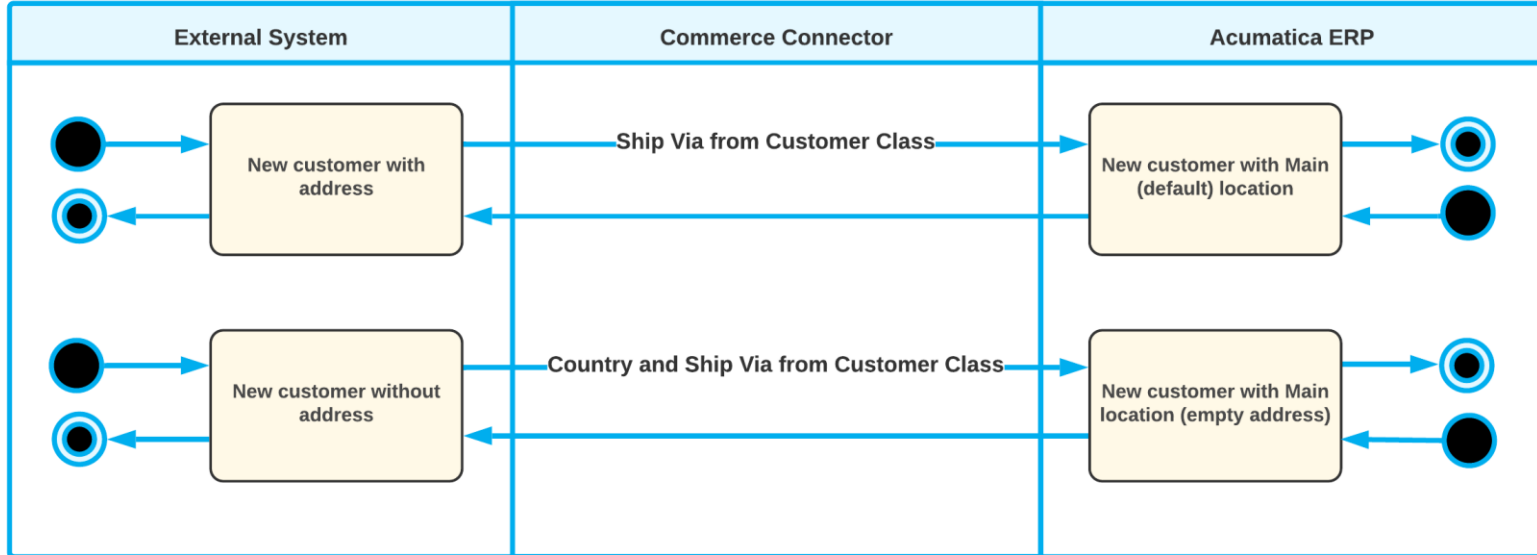


Figure: Synchronization of a new customer address

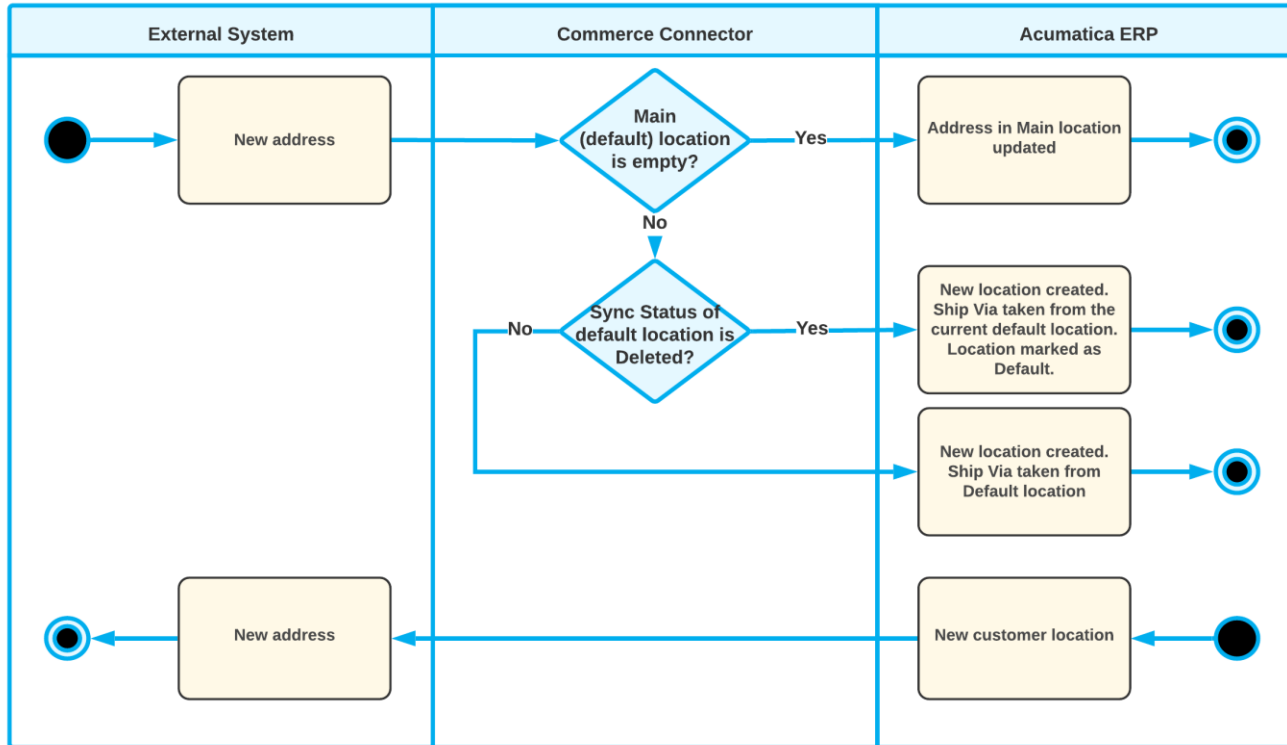


Figure: Synchronization of an updated customer address

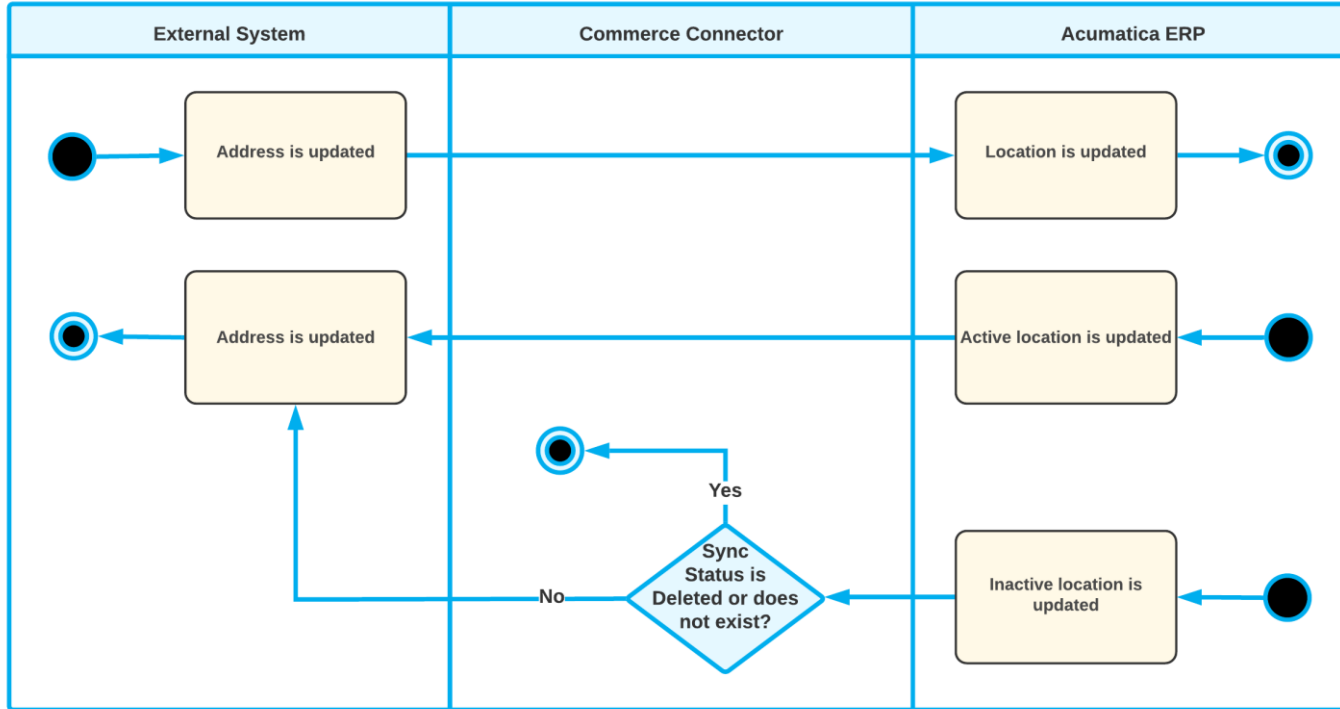
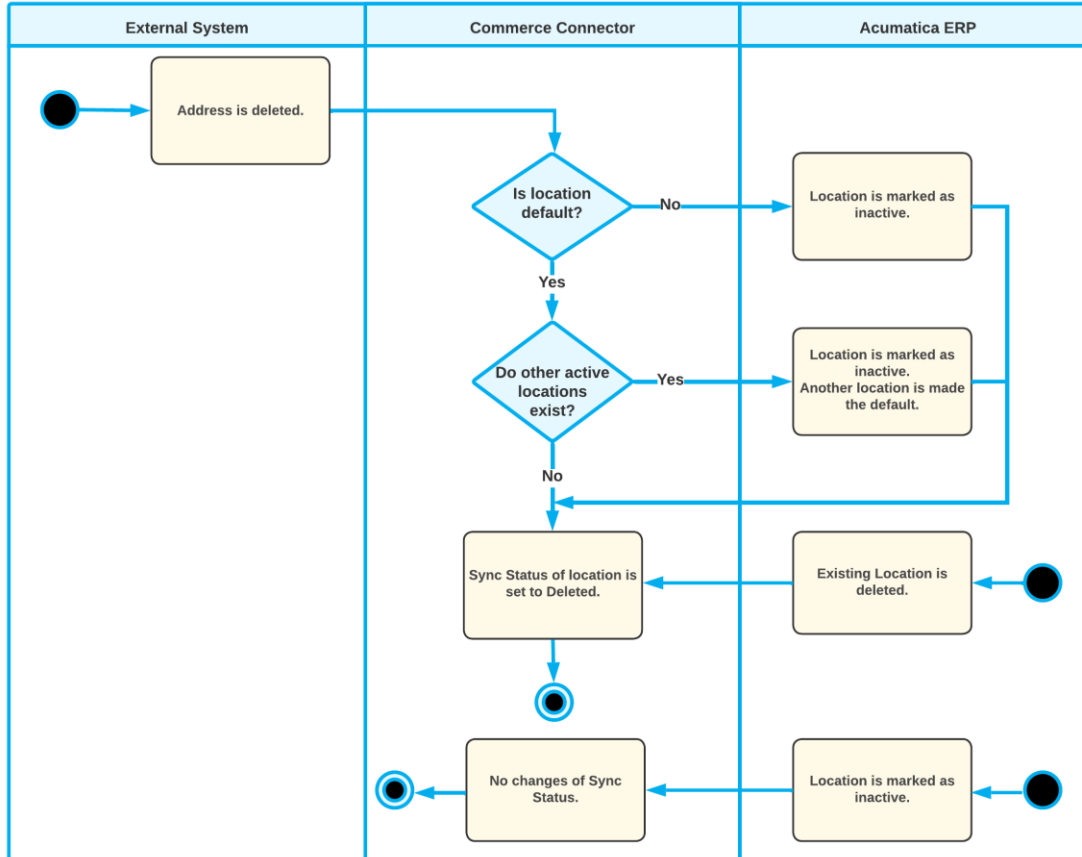


Figure: Synchronization of a deleted customer address



Synchronizing Customers: To Perform Bidirectional Synchronization

Story

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.

Synchronizing Customers: To Perform Bidirectional Synchronization

Configuration overview for U100 dataset:

- On the Customer Classes (AR201000) form, the COMMERCEBB and ECCUSTOMER customer classes have been configured. The COMMERCEBB customer class is assigned to local (US) customers that need to be exported to the external system.
- On the Customers (AR303000) form, the following customer records have been created and assigned the COMMERCEBB customer class:
 - FRUITICO: On the General tab, notice that no details have been specified in the boxes of the Primary Contact section. In the Additional Account Info section, the account's email address and phone number have been specified.
 - JAMIFIQUE: On the General tab, notice that in the Primary Contact section, the name of the contact (Colleen Plunkett) has been filled in. In the Additional Account Info section, the account's email address and phone number have been specified.
- On the Numbering Sequences (CS201010) form, the ECCUSTOMER numbering sequence has been defined.

Synchronizing Customers: To Perform Bidirectional Synchronization

Process overview

Steps	Details
1. Configuring the Filtering Condition	On the Entities (BC202000) form, configure the filtering condition for the export of customers from Acumatica ERP to the BigCommerce store.
2. Preparing the Customer Data for Synchronization	On the Prepare Data (BC501000) form, start the data preparation process for the Customer entity to prepare out-of-sync data for export.
3. Processing the Prepared Customer Data	On the Process Data (BC501500) form, start data processing for the Customer entity to save the synchronized customer data in the BigCommerce store.
4. Reviewing the Synchronization Status	On the Sync History (BC301000) form, review the synchronization status of the processed synchronization records.
5. Viewing Exported Customer Records	In the BigCommerce store, review the customers that have been imported from Acumatica ERP.

Note: On the Entity Settings tab of the BigCommerce Stores (BC201000) form Customer entity, should be active with Sync Direction set to Bidirectional and Primary System set to External System.

Figure: Synchronization records for processed customer entities

Sync History CUSTOMIZATION TOOLS ▾

🔄 📄 ↶ 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	External Description	Status	Last Message	Last Operation	Last Attempt
>	<input type="checkbox"/>	<input type="checkbox"/>	Customer	SweetStore - BC	JAMIFIQUE , Jamifique factory	3	colleenp_jamifique@example.com	Processed		Inserted Externally	5/8/2024 6:58 PM
	<input type="checkbox"/>	<input type="checkbox"/>	Customer	SweetStore - BC	FRUITICO , Fruitico Coffee and Cakes	2	fruitico_info@example.com	Processed		Inserted Externally	5/8/2024 6:57 PM
	<input type="checkbox"/>	<input type="checkbox"/>	Customer	SweetStore - BC	C000000001 , Larry Coleman	1	larry@example.com	Processed		Inserted in ERP	5/8/2024 3:10 PM

Synchronizing Customers: To Synchronize Customers with Multiple Locations

Story

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.

Synchronizing Customers: To Perform Bidirectional Synchronization

Configuration overview for U100 dataset:

- On the Enable/Disable Features (CS100000) form, the Business Account Locations feature has been enabled.
- On the Customer Classes (AR201000) form, the ECCUSTOMER customer class has been defined.
- On the Numbering Sequences (CS201010) form, the ECCUSTOMER and ECLOCATION numbering sequences have been defined.

Synchronizing Customers: To Perform Bidirectional Synchronization

Process overview

Steps	Details
1. Configuring the Synchronization Settings of the Customer and Customer Location Entities	On the BigCommerce Stores (BC201000) form, update the settings of the Customer and Customer Locations entities.
2. Creating a Customer in the BigCommerce Store	In the control panel of the BigCommerce store, create a new customer with two addresses.
3. Adding Two Addresses for the Customer	On the Prepare Data (BC501000) form, prepare the customer and customer address data for synchronization.
4. Preparing the Customer and Customer Location Data	On the Process Data (BC501500) form, process the customer and customer address data prepared for synchronization.
5. Processing the Prepared Customer and Customer Location Data	On the Customers (AR303000) form, review the imported customer data.

Synchronizing Customers: To Perform Bidirectional Synchronization

Process overview (continue)

Steps	Details
6. Reviewing the Imported Customers and Customer Locations	On the Customer Locations (AR303020) form, review the imported customer address data and update one of the customer locations.
7. Updating the Customer Location	On the Customer Locations (AR303020) form, update one of the customer locations.
8. Synchronizing the Updated Location with the BigCommerce Store	By using the Sync History (BC301000) form, synchronize the updated customer location with the BigCommerce store.
9. Reviewing the Updated Customer Address in the BigCommerce Store	In the control panel of the BigCommerce store, review the updated customer address.

Figure: Customer locations imported from the store

Customers

C000000002 - Hoppy Place Coffee and Cakes

NOTES FILES CUSTOMIZATION TOOLS

← ↻ 📄 + ↶ 🗑️ 📄 ▾ |< < > >| VIEW ACCOUNT ...

* Customer ID: C000000002 - Hoppy Place Coffee an
* Customer Status: Active
* Customer Class: ECCUSTOMER - Online Customers
Customer Category: Individual

Balance: 0.00
Prepayment Balance: 0.00
Retained Balance: 0.00

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS

🔄 + SET AS DEFAULT |<| ☒ [] All Records

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



Part 3: Synchronization of Products

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

Learning Objectives

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

- To export stock and non-stock items to the BigCommerce store.

Applicable Scenarios

- When the external system is configured and needs to transfer stock and non-stock items that have already been defined in Acumatica ERP
- If an item that was synchronized previously was updated in Acumatica ERP and the changes should be reflected in the product settings in the external system

Synchronization of Stock Items and Non-Stock Items

Configuration of Product Synchronization

- Activate the Stock Item and Non-Stock Item entity.
- Configure the default visibility and purchasability settings for items exported to the BigCommerce store.
- Determine which items should be exported and define the visibility and purchasability settings for individual items.

Note: During the export, the system updates the availability and visibility settings of each item exported to BigCommerce based on the settings specified for the item on the eCommerce tab of the Non-Stock Items form or Stock Items form and for the store on the Inventory Settings tab of the BigCommerce Stores (BC201000) form.

Product Synchronization: Default Store Settings

Default Product Availability Settings – Inventory Setting tab of the BigCommerce Stores (BC201000) form

Default Availability:

- Set as Available (Track Qty.)
- Set as Available (Don't Track Qty.)
- Set as Pre-Order
- Do Not Update
- Set as Unavailable

When Qty. Unavailable:

- Do Nothing
- Set as Unavailable
- Set as Pre-Order

EXPORT SETTINGS

Default Stock Categories:	<input type="text"/>
Default Non-Stock Categories:	<input type="text"/>
Related Items:	<input type="text"/>
Default Visibility:	Visible
Default Availability:	Set as Available (Don't Track Qty)
When Qty Unavailable:	Set as Available (Track Qty)
Availability Mode:	Set as Available (Don't Track Qty)
Warehouse Mode:	Set as Pre-Order

Set as Unavailable

EXPORT SETTINGS

Default Stock Categories:	<input type="text"/>
Default Non-Stock Categories:	<input type="text"/>
Related Items:	<input type="text"/>
Default Visibility:	Visible
Default Availability:	Set as Available (Track Qty)
When Qty Unavailable:	Do Nothing
Availability Mode:	Do Nothing
Warehouse Mode:	Set as Unavailable

Set as Pre-Order

Product Synchronization: Default Store Settings

Default Visibility Settings - Inventory Settings tab of the BigCommerce Stores (BC201000) form

Default Visibility :

- Visible
- Featured
- Invisible

EXPORT SETTINGS

Default Stock Categories:	<input type="text"/>
Default Non-Stock Categories:	<input type="text"/>
Related Items:	<input type="text"/>
Default Visibility:	<input type="text" value="Visible"/>
Default Availability:	<input type="text" value="Visible"/>
When Qty Unavailable:	<input type="text" value="Featured"/>
Availability Mode:	<input type="text" value="Available for Shipping"/>
Warehouse Mode:	<input type="text" value="All Warehouses"/>

Product Synchronization: Settings of Individual Items

Export to External System

Visibility:

- Store Default
- Visible
- Featured
- Invisible

Availability:

- Store Default
- Set as Available (Track Qty.)
- Set as Available (Don't Track Qty.)
- Set as Pre-Order
- Do Not Update
- Set as Unavailable

GENERAL	PRICE/COST	MANUFACTURING	ECOMMERCE
<input checked="" type="checkbox"/> Export to External System			
Visibility:	<input type="text" value="Visible"/>		
Availability:	<input type="text" value="Store Default"/>		
Availability Adjustment:	<input type="text" value="0.00"/>		
When Qty Unavailable:	<input type="text" value="Store Default"/>		
Custom URL:	<input type="text"/>		
Page Title:	<input type="text"/>		
Search Keywords:	<input type="text"/>		
Meta Keywords:	<input type="text"/>		

Product Synchronization: Sales Categories

- Only exported categories are assigned for exported item in the BigCommerce store
- If an exported item has no sales categories assigned, then default categories are used.

CONNECTION SETTINGS			ENTITY SETTINGS	CUSTOMER SETTINGS		
		Active	Entity	Sync Direction	Primary System	
		<input type="checkbox"/>	Customer Price Cl...	Export	ERP	
		<input type="checkbox"/>	Customer	Bidirectional	External System	
		<input type="checkbox"/>	Customer Location	Bidirectional	External System	
		<input checked="" type="checkbox"/>	Sales Category	Export	ERP	
		<input checked="" type="checkbox"/>	Stock Item	Export	ERP	

CONNECTION SETTINGS ENTITY SETTINGS **INVENTORY SETTINGS**

EXPORT SETTINGS

Default Stock Categories:

Default Non-Stock Categories:

Related Items:

Default Visibility:

Default Availability:

When Qty Unavailable:

Availability Mode:

Warehouse Mode:

IMPORT SETTINGS

- Food Items
- Electronics
- Software
- Office Electronics
- Industrial Equipment
- Consumer Goods
- Computers
- Laptops
- Laptop Motherboard
- Other
- Services

Product Synchronization: To Synchronize Non-Stock Items with Attributes

Story

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.

Product Synchronization: To Synchronize Non-Stock Items with Attributes

Configuration overview for U100 dataset:

- On the Item Classes (IN201000) form, the TRAINING item class has been defined.
- On the Non-Stock Items (IN202000), the ONLCOURSE non-stock item of the TRAINING item class has been created.

Product Synchronization: To Synchronize Non-Stock Items with Attributes

Process overview

Steps	Details
1. Creating an Attribute	On the Attributes (CS205000) form, create an attribute for the course release date.
2. Adding the Attribute to the Needed Item Class	On the Item Classes (IN201000) form, add the attribute to the TRAINING item class.
3. Assigning a Value to the Added Attribute	On the Non-Stock Items (IN202000) form, assign a value to the created attribute for a particular non-stock item.
4. Mapping the Attribute to a Field in the BigCommerce Store	On the Entities (BC202000) form, map the attribute field with a product field in the BigCommerce store.
5. Configuring the Export of a Subset of Non-Stock Items	On the Entities (BC202000) form, add export filtering for Training item class
6. Preparing Product Data for Synchronization	On the Prepare Data (BC501000) form, prepare the non-stock item data for synchronization.

Product Synchronization: To Synchronize Non-Stock Items with Attributes

Process overview (continue)

Steps	Details
7. Processing the Prepared Product Data	On the Process Data (BC501500) form, process the data prepared for synchronization.
8. Viewing the Exported Product	In the control panel of the BigCommerce store, review the exported product.

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

Expected release date is 1st Jan 2025

Quantity:

▼ 1 ▲

[Pre-Order Now](#) [Add to Wish List](#) ▼

[f](#) [X](#) [✉](#) [🖨](#) [p](#)

Image
Coming
Soon

Product Synchronization: To Synchronize Stock Items with Attributes

Story

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.

Product Synchronization: To Synchronize Stock Items with Attributes

Configuration overview for U100 dataset:

- On the Item Classes (IN201000) form, the JAM item class has been defined.
- On the Stock Items (IN202500) form, the CHERJAM96 stock item of the JAM item class has been created.

Product Synchronization: To Synchronize Stock Items with Attributes

Process overview

Steps	Details
1. Creating an Attribute	On the Attributes (CS205000) form, create an attribute for the sugar level of the products.
2. Adding the Attribute to the Needed Item Class	On the Item Classes (IN201000) form, add the attribute to the JAM item class.
3. Assigning a Value to the Added Attribute	On the Stock Items (IN202500) form, assign a value to the created attribute for a particular stock item.
4. Mapping the Attribute to a Field in the BigCommerce Store	On the Entities form, map the attribute field with a product field in the BigCommerce store.
5. Preparing Product Data for Synchronization	On the Prepare Data (BC501000) form, prepare stock item data for synchronization.
6. Processing the Prepared Product Data	On the Process Data (BC501500) form, process the data prepared for synchronization.
7. Viewing the Exported Products	In the control panel of the BigCommerce store, review the exported product.

Figure: The custom attribute shown on the storefront

[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 ▲

[Pre-Order Now](#) [Add to Wish List](#) ▼

[f](#) [X](#) [✉](#) [🖨](#) [📌](#)

Image Coming Soon

Lesson 3.2: Synchronization of Product Images

Learning Objectives

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

- To export product images from Acumatica ERP to the BigCommerce store.

Applicable Scenarios

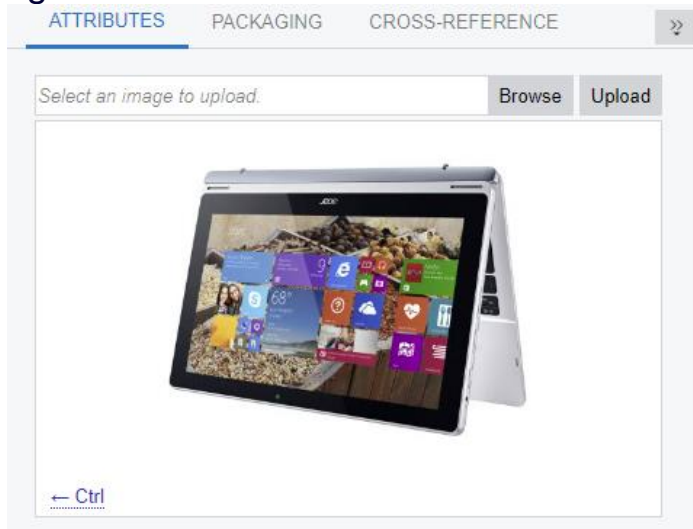
You export product images to your BigCommerce store if they are saved in Acumatica ERP in either of the following ways:

- As attachments to an item
- As links to an external storage

Product Synchronization: Product Images

Export of Images Attached to an Item

- Images can be attached on the Attributes tab of the Stock Items (IN202500) and Non-Stock Items (IN202000) forms.
- An items should be exported or created in the BigCommerce store
- Images be exported if Product Image entity is active
- WebDAV credentials are required

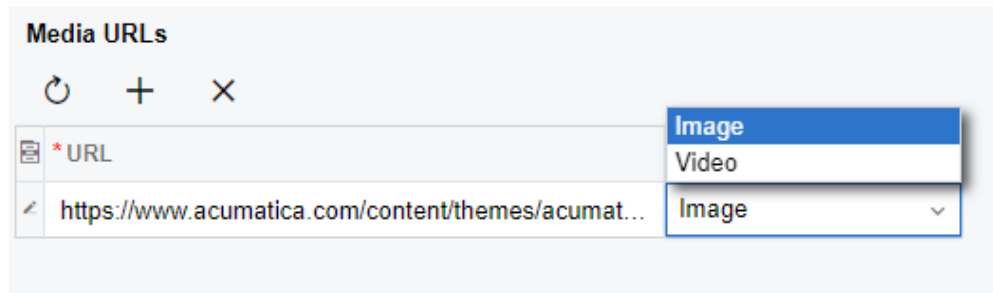


CONNECTION SETTINGS		ENTITY SETTINGS			
		Active	Entity	Sync Direction	Primary System
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stock Item	Export	ERP
	<input type="checkbox"/>	<input type="checkbox"/>	Non-Stock Item	Export	ERP
	<input type="checkbox"/>	<input type="checkbox"/>	Template Item	Export	ERP
	<input type="checkbox"/>	<input type="checkbox"/>	Base Sales Price	Export	ERP
	<input type="checkbox"/>	<input type="checkbox"/>	Price List	Export	ERP
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Product Image	Export	ERP

Product Synchronization: Product Images

Export of Images Saved as Links to An External Storage

- Links to product images can be saved in the Media URLs table on the eCommerce tab of the Stock Items and Non-Stock Items forms.
- Images are exported during the synchronization of items.
- Links to videos on a public video hosting service, such as YouTube can be set.
- If a link deleted in Acumatica ERP the image or video will also be deleted from the BigCommerce Store



Product Synchronization: To Export Product Images

Story

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.

Product Synchronization: To Synchronize Stock Items with Attributes

Process overview

Steps	Details
1. Obtaining the WebDAV Credentials	In the BigCommerce store, locate WebDAV credentials needed for the synchronization of product images.
2. Activating the Needed Entity	On the BigCommerce Stores (BC201000) form, activate the Product Image entity.
3. Adding an Image to the Stock Item	On the Stock Items (IN202500) form, Attributes tab add image files.
4. Preparing the Image Data for Synchronization	On the Prepare Data form, prepare the product image data for synchronization.
5. Processing the Prepared Image Data	On the Process Data form, process the product image data prepared for synchronization.
6. Reviewing the Synchronized Images	In the control panel of the BigCommerce store, review the exported images.

Figure: Synchronization records for the product images

Sync History CUSTOMIZATION TOOLS ▾

🔄 📄 ↶ **SYNC** ⏪ 🗑️ 🔍 ⋮

Store: 🔍

Entity: ▾

ALL RECORDS READY TO PROCESS FAILED **PROCESSED** SKIPPED ABORTED DELETED ⌵

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entity	Store	ERP ID	External ID	External Description	Status
>	<input type="checkbox"/>	<input type="checkbox"/>	Product Image	SweetStore - BC	Stock Items (APJAM08) \AppleJam2.png	112:379	Apple jam 8 oz.	Processed
	<input type="checkbox"/>	<input type="checkbox"/>	Product Image	SweetStore - BC	Stock Items (APJAM08) \AppleJam1.png	112:378	Apple jam 8 oz.	Processed



Day 3

Days 1&2 Recap

We learned how to do the following:

- Set up a BigCommerce store
- Obtain the BigCommerce API keys
- Connection to the BigCommerce store
- Perform the initial configuration of entities
- Export and Import Filtering
- Field Mapping
- Perform the first synchronization manually
- Set up the synchronization of customers and customer locations (addresses)
- Export stock and non-stock items
- Export product images

Lessons

Lesson 3.3: Synchronization of Product Availability

This lesson explains how you export product availability information from Acumatica ERP to a BigCommerce store.

Lesson 3.4: Synchronization of Sales Prices

This lesson explains how you export items' sales prices from Acumatica ERP to a BigCommerce store.

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

This lesson explains how you import orders and payments from a BigCommerce store to Acumatica ERP.

Lesson 4.2: Payments with Gift Certificates

This lesson explains how you import orders with gift certificates from a BigCommerce store to Acumatica ERP.

Lesson 3.3: Synchronization of Product Availability

Learning Objectives

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

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

Applicable Scenarios

- You track available quantities of stock items exported to the BigCommerce store if you want to make these items available for purchase by shoppers through the storefront only if there is enough in stock.

Product Availability Synchronization

Prerequisites for synchronization of Product Availability Synchronization between Acumatica ERP and the BigCommerce store

- Activate the Product Availability entity.
- Specify the quantity calculation settings for the store on the Inventory Settings tab of the BigCommerce Stores form.
- Determine the stock items for which available quantities should be exported.

Tracking Available Quantities of Exported Stock Items

Exported stock item is available for purchase:

Availability	Purchasability	Inventory section	Track inventory
Set as Available (Track Qty.)	This product can be purchased in my online store	Track inventory	On the product level

Action for stock items whose quantities become zero:

When Qty. Unavailable	Purchasability	Track inventory on the product level
Set as Unavailable	This product cannot be purchased in my online store	Not updated
Set as Pre-Order/Continue Selling	This product is coming soon but I want to take pre-orders	Cleared
Do Nothing	Not Updated	Not updated

Synchronization of Availability Settings

With the synchronization of the Stock Item entity **Purchasability gets updated** according to:

- Availability settings – for any stock items.
- When Qty.Unavailable setting – for stock items with tracked quantities and 0 stock.

Synchronization of Available Quantities

Available quantities of stock items :

- Exported when Product Availability entity is active.
- Affects only the stock items that have Availability set to Set as Available (Track Qty.) .
- Depends on Warehouse Mode and Availability Mode settings specified .
- Exported in item`s sales unit of measure.

Product Availability: Calculation of Available Quantities

Selection of the Availability Mode and the Warehouse Mode

Type of quantity to export is defined by the **Availability Mode**:

- On Hand:
- Available for Shipping:
- Available

Warehouses to export quantity are defined by the **Warehouse Mode**:

- All Warehouses
- Specific Warehouses

Note: Adjustment of Available Quantities can be set in the Availability Adjustment box on the eCommerce tab of the Stock Items (IN202500) form.

Product Availability: To Export Product Availability Data

Story

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.
- 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.

Product Availability: To Export Product Availability Data

Configuration overview for U100 dataset:

- On the Enable/Disable Features (CS100000) form, the following features have been enabled:
 - Multiple Warehouses
 - Multiple Warehouse Locations
- On the Warehouses (IN204000) form, the RETAIL warehouse and the JS1 warehouse location have been configured.
- On the Stock Items (IN202500) form, the needed stock items have been created in the system and assigned the availability settings.

Figure: Quantities of stock items available for shipping

Storage Details by Item Warehouse Location

CUSTOMIZATION ▾ TOOLS ▾



Warehouse:

Location ID: = '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	Location ID	Qty. On Hand in Location	Qty. Available in Location	Qty. Available for Shipping in Location	Qty. Available for Issue in Location
BANJAM08	RETAIL	0.00	0.00	0.00	0.00	JS1	0.00	0.00	0.00	0.00
BANJAM96	RETAIL	70.00	60.00	60.00	70.00	JS1	50.00	40.00	40.00	50.00
CHERJAM08	RETAIL	0.00	0.00	0.00	0.00	JS1	0.00	0.00	0.00	0.00
CHERJAM96	RETAIL	70.00	65.00	65.00	70.00	JS1	50.00	45.00	45.00	50.00
KIWJAM08	RETAIL	0.00	0.00	0.00	0.00	JS1	0.00	0.00	0.00	0.00
KIWJAM96	RETAIL	70.00	53.00	53.00	65.00	JS1	50.00	33.00	33.00	45.00
PEARJAM08	RETAIL	0.00	0.00	0.00	0.00	JS1	0.00	0.00	0.00	0.00
PEARJAM96	RETAIL	70.00	55.00	55.00	70.00	JS1	50.00	35.00	35.00	50.00
PLUMJAM08	RETAIL	0.00	0.00	0.00	0.00	JS1	0.00	0.00	0.00	0.00
PLUMJAM96	RETAIL	70.00	62.00	62.00	70.00	JS1	50.00	42.00	42.00	50.00

Figure: Stock items configuration

Stock Item	Availability	When Qty. Unavailable
<i>BANJAM96</i>	<i>Store Default</i>	<i>Store Default</i>
<i>BANJAM08</i>	<i>Store Default</i>	<i>Store Default</i>
<i>PEARJAM96</i>	<i>Set as Available (Track Qty.)</i>	<i>Set as Unavailable</i>
<i>PEARJAM08</i>	<i>Set as Available (Track Qty.)</i>	<i>Set as Unavailable</i>
<i>PLUMJAM96</i>	<i>Set as Available (Track Qty.)</i>	<i>Do Nothing</i>
<i>PLUMJAM08</i>	<i>Set as Available (Track Qty.)</i>	<i>Do Nothing</i>
<i>CHERJAM96</i>	<i>Set as Pre-Order</i>	<i>Store Default</i>

Product Availability: To Export Product Availability Data

Process overview

Steps	Details
1. Updating the Default Availability Settings	On the BigCommerce Stores (BC201000) form, update the default availability settings for the BigCommerce store.
2. Reviewing the Available Quantities of Items	On the Storage Details by Item Warehouse Location (IN408055) form, review the quantities of stock items available in the RETAIL warehouse.
3. Synchronizing the Product Availability Data	On the Prepare Data (BC501000) form, prepare the product availability data for synchronization, and on the Process Data (BC501500) form, process the prepared product availability data.
4. Reviewing the Synchronized Data	In the BigCommerce store, review the availability settings and quantities of the exported

Lesson 3.4: Synchronization of Sales Prices

Learning Objectives

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

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

Applicable Scenarios

You might want to synchronize sales prices from Acumatica ERP with the BigCommerce store if you maintain base prices of non-stock and stock items in Acumatica ERP and want to quickly update sales prices of the corresponding products in BigCommerce.

Price Synchronization: General Information

Synchronization of Default Item Prices

- Can be set on the Stock Items (IN202500) or Non-Stock Items (IN202000) form.
- Exported when the items (stock/non-stock) is synchronized.
- In the BigCommerce are shown as Default price for a product.

Synchronization of Base Sales Prices

- Maintained on the Sales Prices (AR202000) form or the Sales Price Worksheets (AR202010) form for Base Price type.
- Exported with the Base Sales Price entity.
- In the BigCommerce are shown as Sale Price for a product.

Price Synchronization: General Information

Limitations of Sales Price Synchronization

- Customer-specific prices cannot be exported,
 - Base Price type is accepted only
- UOM-specific prices cannot be exported,
 - Sales UOM is accepted only
- Warehouse-specific prices cannot be exported,
 - Warehouse column for a particular price should be empty
- Only prices that are effective on the date of the synchronization are exported.

Price Synchronization: General Information

Price Synchronization: Volume-Based Prices

- Available if **Volume Pricing feature** is enabled on the **Enable/Disable Features (CS100000) form**.
- Imported volume-dependent prices of the Base type defined for a product appear in BigCommerce as a table under Bulk Pricing in the Pricing subsection on the View Products page of a particular product.
- Imported volume-dependent prices of the Customer Price Class defined for a product appear in BigCommerce in a price list for a particular customer group.

Price Synchronization: Prices for Customer Groups

Synchronization of Customer Price Classes and Price Lists

- Can be exported if **Business-to-Business Entities feature is enabled** on the Enable/Disable Features (CS100000) form.
- Maintained on the Sales Prices (AR202000) form or the Sales Price Worksheets (AR202010) form for Customer Price Class Price type.
- Exported when the Customer Price Class and the Price List entities are activated.
- Exported when the items (stock/non-stock) is synchronized.
- **Customer Price Classes** in the BigCommerce are shown as Customer Groups
- Prices with Customer Price Class type in the BigCommerce are shown as Price Lists

Price Synchronization: To Export Base Prices

Story

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, 2023.

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

Price Synchronization: To Export Base Prices

Configuration overview for U100 dataset:

- On the Enable/Disable Features (CS100000) form, **the Volume Pricing feature** has been enabled.
- On the Stock Items (IN202500) form, the PEARJAM96 and BANJAM96 stock items have been created.
- On the Sales Prices (AR202000) form, the proper sales prices have been defined.

Price Synchronization: To Export Base Prices

Process overview

Steps	Details
1. Activate the Base Sales Price entity.	On the BigCommerce Stores (BC201000) form, activate the Base Sales Price entity.
2. Reviewing the Base Sales Prices Defined for Stock Items	On the Sales Prices (AR202000) form, review the sales prices of the Base type, including volume-dependent prices, defined for particular items.
3. Synchronizing the Prices of Stock Items	On the Prepare Data (BC501000) form, prepare the base sales price data for synchronization; on the Process Data (BC501500) form, process the prepared data.
4. Reviewing the Exported Base Prices	In the control panel of the BigCommerce store, review the exported base prices of items.
5. Reviewing the Exported Volume-Based Prices	In the control panel of the BigCommerce store, review the exported volume-based prices of items.

Figure: Base prices and default price specified for the item

← Pear jam 96 oz [✕](#) 9 of 34 < >

- Basic information
- Description
- Images & videos
- Product identifiers
- Pricing**
- Inventory
- Variations
- Customizations
- Storefront details
- Custom fields
- Related products

Pricing

Default Price * (excluding tax)
\$ 45.15

Tax Class ⓘ
Default Tax Class

▼ Hide Advanced Pricing

Cost
\$ 0

MSRP
\$ 0

Sale Price
\$ 45.00



Figure: Exported Volume-Based Prices for the item

Bulk Pricing

Create bulk pricing rules to offer price discounts based on quantity breaks.

Discount Type

\$ Fixed Amount

Min Quantity	\$ Fixed Amount	Unit Price	
5	\$43.00	\$43.00	
10	\$40.00	\$40.00	

[+ Add tier](#)



Part 4: Synchronization of Orders

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

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

Applicable Scenarios

The synchronization of orders is the main scenario for the integration between an ERP system and an external ecommerce system.

Minimal Configuration of Order Synchronization

To start importing sales orders from the BigCommerce store:

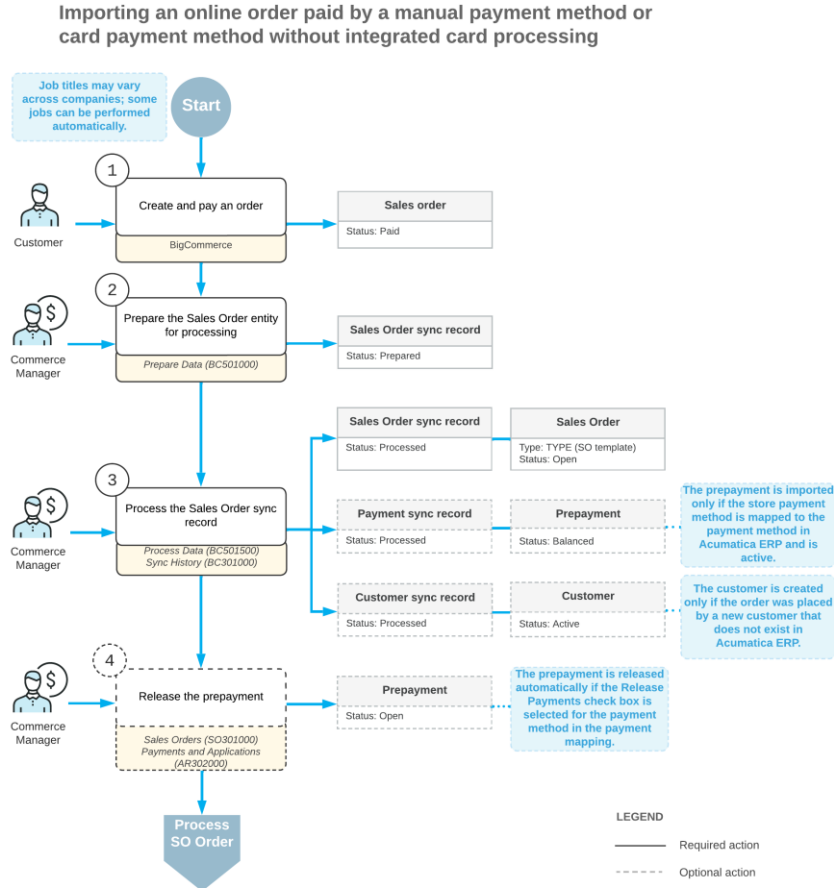
- Activate the Sales Order and Customer entities
- Specify the minimal required settings for:
 - Customer
 - Stock Item and Non-Stock Item
 - Sales Order
 - Branch
 - Order Type for Import
 - Refund Amount Item
- Map each shipping options

Synchronization of Sales Orders and Payments

When Orders are imported from a BigCommerce store during the synchronization of the Sales Order entity the connector:

1. Creates a sales order on the Sales Orders (SO301000) form
 - Archived orders are filtered
2. Searches for products by SKU (that is, stock and non-stock items) included in the sales order
 - Products must be synchronized or created in Acumatica ERP
3. Searches for a customer that placed the order, and inserts it in the sales order.
 - New customer gets created or existing one can be updated
4. Creates a document of the Prepayment type on the Payments and Applications (AR302000) form
 - Store payment method must be mapped

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



Order Synchronization: Non-Card Payments

Configuration of Payment Synchronization on the BigCommerce Stores (BC201000) form

- Activate the Payment entity on the Entity Settings tab
- Create a mapping with a payment method on the Payment Settings tab

Synchronization of Payments

- Payments can be imported independently of orders by preparing and processing the Payment entity
- The system creates a document of the Prepayment type on the Payments and Applications (AR302000) form
- The system applies the Prepayment to the sales order

Order Synchronization: Card Payments

The ability to use card-processing features, such as authorization, capture, voiding, and refunding card transactions, is available if the ***Integrated Card Processing feature is enabled*** on the Enable/Disable Features (CS100000) form.

Configuration of Authorize.Net Payment Method for Integrated Card Processing

1. Sign up for an Authorize.Net account.
2. Select the **Enable Integrated CC Processing** check box on the **Accounts Receivable Preferences** (AR101000) form.
3. Configure an Authorize.Net processing center on the **Processing Centers** (CA205000) form.
4. Configure a card-based payment method on the **Payment Methods** (CA204000) form.
5. Configure the Authorize.Net payment gateway in the BigCommerce store.
6. Map the card-based payment method with the store payment method on the **BigCommerce Stores** (BC201000) form.

Mapping of Card-Based Payment Methods

Payment method mapping should be done in the table on the Payment Settings tab of the BigCommerce Stores (BC201000) form.

For the Authorize.Net store payment method should be set:

- ERP Payment Method
- Cash Account
- Proc. Center ID:
- Active check box
- Release Payments and Refunds check box
- Process Refunds check box

Import of Payments Based on Credit Cards (Authorize.Net)

Payments and Applications

NOTES

Prepayment 000080 - eCommerce Guest Customer

← 📄 📄 ↶ + 🗑️ 📄 ▾ |⏪ < > |⏩ ...

Type:	<input type="text" value="Prepayme..."/>	Customer:	ECOMGUEST - eCommerce Guest Cust	Payment Amo...	110.45	
Reference Nbr.:	<input type="text" value="000080"/>	Location:	MAIN - Primary Location	Applied to Doc...	0.00	
Status:	Pending Proc...	Payment Meth...	ALLCARDS - All card payments	Applied to Ord...	110.45	
* Application Date:	<input type="text" value="9/29/2024"/>	Proc. Center ID:	AUTHNETCOM - Authorize.Net Commerc	Available Bala...	0.00	
* Application Pe...	<input type="text" value="09-2024"/>	Processing St...	Pre-Authorized	Write-Off Amo...	0.00	
Payment Ref.:	80026341634	Cash Account:	10250ST - Company Merchant Account	Finance Charg...	0.00	
				Deducted Cha...	0.00	
Description: V200_Test Payment Method: AUTHORIZENET (CREDIT_CARD) Order: 103 Payment ID:						

DOCUMENTS TO APPLY SALES ORDERS APPLICATION HISTORY FINANCIAL **CARD PROCESSING** CHARGES COMPLIANCE

🔄 | 📄 | 🗑️

	Tran. Nbr.	*Proc. Center	Tran. Type	Tran. Status	Tran. Amount	Expire On (Est.)	Referen. Tran. Nbr.	Proc. Center Tran. Nbr.	Proc. Center Response Reason
>	4	AUTHNETCOM	Authorize Only	Approved	110.4500	10/9/2024		80026341634	Imported External Transaction

Import of Payments Based on Credit Cards (Authorize.Net)

When the payment is imported on the Payments and Applications (AR302000) form, the system creates a document of the Prepayment type with the Pending Processing status.

In the created document, the system inserts the following information:

In the Summary area:

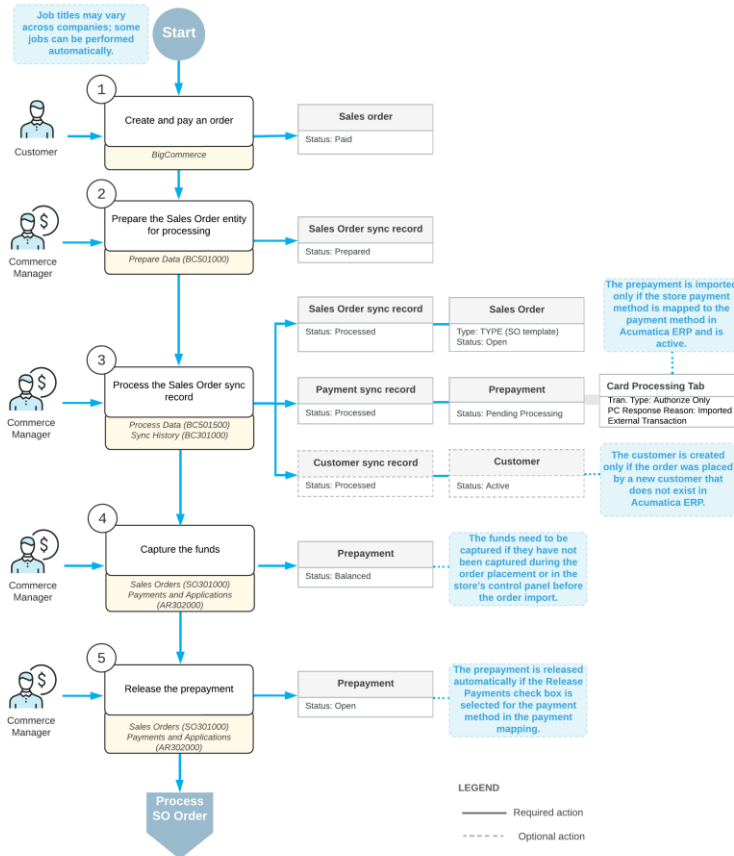
- Payment Method
- Cash Account
- Payment Ref.
- Processing Status
 - *Pre-Authorized*
 - *Captured*
 - *Pre-Auth./Capture Pending Validation*

On the Card Processing tab

- A row for the last successful credit card operation with
- Proc. Center Response Reason as Imported External Transaction
 - Tran. Type (one of the following)
 - *Authorize Only*
 - *Authorize and Capture*
 - *Capture Authorized*
 - *Unknown*

Figure: Import of Payments Based on Credit Cards (Authorize.Net)

Importing an online order paid by a card (Authorize.Net), with integrated card processing



Deferred Processing of Imported Credit Card Payments

Credit card transactions created in Acumatica ERP require validation in the following cases:

- If the customer used a previously saved credit card
- If the customer entered the details of a new card and saved this card
- If the last operation on the credit card transaction has the Unknown status

External credit card transactions that require validation are displayed on the Deferred Processing Required tab of the **Validate Card Payments (AR513000) form** and have the Load Payment Profile check box selected.

When the validation process actions:

1. On the Customer Payment Methods (AR303010) form, creates a customer payment method
2. Links the customer payment method to the credit card transaction and to the imported payment.
3. Requests the status of the credit card transaction, and updates the processing status of the transaction and the status of the prepayment, if necessary.

Order Synchronization: To Configure and Import Authorize.Net Payments

Story

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.

Order Synchronization: To Configure and Import Authorize.Net Payments

Configuration overview for U100 dataset:

- On the Enable/Disable Features (CS100000) form, the Integrated Card Processing feature has been enabled.
- On the Cash Accounts (CA202000) form, the 10250ST cash account has been created.

Order Synchronization: To Configure and Import Authorize.Net Payments

Process overview

Steps	Details
1. Activating Integrated Card Processing	On the Accounts Receivable Preferences (AR101000) form, activate integrated card processing.
2. Creating the Processing Center	On the Processing Centers (CA205000) form, define a processing center.
3. Specifying the Connection Settings for the Processing Center	On the Processing Centers form, connect the processing center to the Authorize.Net payment gateway.
4. Configuring a Payment Method that Represents Payments by Card	On the Payment Methods (CA204000) form, define a payment method that will represent all card payments in the BigCommerce store.
5. Defining the Authorize.Net Payment Gateway in the BigCommerce Store	In the control panel of the BigCommerce store, enable the Authorize.Net payment gateway
6. Creating the Mapping for the Authorize.Net Store Payment Method	On the BigCommerce Stores (BC201000) form, map the Authorize.Net store payment method with the payment method defined in Acumatica ERP.

Order Synchronization: To Configure and Import Authorize.Net Payments

Process overview (continue)

Steps	Details
7. Creating an Order Through the Storefront	On the storefront of the BigCommerce store, create a test order paid by card.
8. Reviewing the Sales Order in the Control Panel	In the control panel of the BigCommerce store, review the created test sales order.
9. Importing the Sales Order	On the Prepare Data (BC501000) form, prepare the sales order for synchronization; on the Process Data (BC501500) form, process the sales order data prepared for synchronization.
10. Reviewing the Imported Sales Order	On the Sales Orders (SO301000) form, review the imported sales order.

Figure: The prepayment applied to the order

Sales Orders

EO 000074 - eCommerce Guest Customer

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD ...

* Order Type: EO * Customer: ECOMGUEST - eCommerce Guest Ct Ordered Qty.: 3.00
 Order Nbr.: 000074 * Location: MAIN - Primary Location Detail Total: 135.45
 Status: Open Contact: Line Discounts: 0.00
 * Date: 5/14/2024 * Project: X - Non-Project Code. Document Dis... 0.00
 * Requested On: 5/14/2024 Description: SweetStore - BC | Order: 111 | Status: Awaiting Payment Freight Total: 0.00
 Customer Ord... Tax Total: 0.00
 External Refer... 111 - SweetSto Order Total: 135.45

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS RELATIONS 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	000078	135.45	0.00	0.00	Pending Processing	80018506419	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

Applicable Scenarios

You set up gift certificates if you want to offer customers the ability to buy a gift certificate and then accept the sold gift certificates as payments for orders.

Gift Certificates: Overview

Selling Gift Certificates

Steps to be able to sell gift certificates and then import sales orders containing them:

- In the BigCommerce store, enable the gift certificate functionality and define gift certificates.
- In Acumatica ERP, define a **non-stock item** that will represent a gift certificate.
- On the Order Settings tab of the BigCommerce Stores (BC201000) form, in the Gift Certificate Item box, specify that non-stock item.

Accepting Gift Certificates as Payment

Steps to be able to import orders that are paid, by gift certificates:

- Map the store payment method representing a gift card to ERP payment method on the Payment Settings tab of the BigCommerce Stores (BC201000) form.

When a sales order that has been paid by a gift certificate is imported, a document of the Prepayment type is created on the Payments and Applications (AR302000) form for the gift certificate payment.

Gift Certificates: Process Activity

Story

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.

Gift Certificates: Process Activity

Configuration overview for U100 dataset:

- On the Non-Stock Items (IN202000) form, the GIFTCERT non-stock item has been created to represent gift certificates sold in the online store.
- On the Payment Methods (CA204000) form, the GIFTCARDS payment method has been created.

Gift Certificates: Process Activity

Process overview

Steps	Details
1. Configuring the Store Settings	On the BigCommerce Stores (BC201000) form, configure the gift certificate settings.
2. Configuring Gift Certificates in the Store	In the control panel of the BigCommerce store, enable the gift certificate functionality and define gift certificates in various amounts to be sold in the online store.
3. Purchasing a Gift Certificate	On the storefront, purchase a gift certificate.
4. Completing the Order	In the control panel of the BigCommerce store, capture the payment and complete the order (after which the system will send the certificate to its recipient).
5. Importing the Order with the Gift Certificate	On the Prepare Data (BC501000) form, prepare the sales order data for synchronization, and on the Process Data (BC501500) form, you will process the prepared data.
6. Reviewing the Imported Order	On the Sales Orders (SO301000) form, review the imported sales order.

Gift Certificates: Process Activity

Process overview (continue)

Steps	Details
7. Paying for the Order with a Gift Certificate	On the storefront, you will create an order and pay part of it with the purchased gift certificate.
8. Importing the Sales Order Paid with the Gift Certificate	On the Prepare Data form, prepare the sales order data for synchronization, and on the Process Data form, you will process the prepared data.
9. Reviewing the Imported Sales Order	On the Sales Orders form, review the imported sales order corresponding to your order on the storefront that was partially paid for with the gift certificate.

Figure: The BigCommerce order with the gift certificate

	Date	Order ID	Customer	Status	Total	Action
	15th May 2024	112	Danny Heady (Guest)	Awaiting Payment	\$25.00	...
Billing	Danny Heady 2779 Canterbury Drive New York, New York 10005		Digital	These items are downloadable and will be sent to the customer once the order is marked as 'Completed'.		1 item
Copy	United States				1 x \$25.00 Gift Certificate	\$25.00
	dheady@example.com					
	15 May 2024 10:41:07					
	Authorize.Net					
	Capture Funds					
					Subtotal	\$25.00
					Shipping	\$0.00
					Tax	\$0.00
					GRAND TOTAL	\$25.00

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

Sales Orders

EO 000076 - 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.: 000076 * Location: MAIN - Primary Location Detail Total: 135.45
 Status: Open Contact: Line Discounts: 0.00
 * Date: 5/15/2024 * Project: X - Non-Project Code. Document Dis... 0.00
 * Requested On: 5/15/2024 Description: SweetStore - BC | Order: 113 | Status: Awaiting Payment Freight Total: 0.00
 Customer Ord... Tax Total: 0.00
 External Refer... 113 - SweetStc Order Total: 135.45

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS RELATIONS 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	000080	110.45	0.00	0.00	Pending Processing	80018566527	ALLCARDS	10250ST	110.45	USD	Pre-Authorized
Prepayment	000081	25.00	0.00	0.00	Balanced	826937283	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

Recap

We learned how to do the following:

- Set up a BigCommerce store
- Obtain the BigCommerce API keys
- Connection to the BigCommerce store
- Perform the initial configuration of entities
- Export and Import Filtering
- Field Mapping
- Perform the first synchronization manually
- Set up the synchronization of customers and customer locations (addresses)
- Export stock and non-stock items
- Export product images
- Export product availability
- Synchronization of Sales Prices
- Setup and Import of Card Payments (Authorize.Net)
- Payments with Gift Certificates



Day 4



Lessons

Lesson 4.3: Import of an Order with Discounts

This lesson explains how you import orders with discounts from a BigCommerce store to Acumatica ERP.

Lesson 4.4: Synchronization of Taxes

This lesson explains how you import orders with taxes from a BigCommerce store to Acumatica ERP.

Lesson 5.1: Automating the Synchronization of Entities

By performing the activities of this lesson, you will become familiar with the scheduled and real-time synchronization of entities between Acumatica ERP and a BigCommerce store.

Lesson 5.2: Monitoring Day-to-Day Commerce Operations

By performing the activities of this lesson, you will become familiar with the tools that you can use to monitor day-to-day e-commerce operations and troubleshoot issues.

Lesson 4.3: Import of an Order with Discounts

Learning Objectives

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

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

Applicable Scenarios

You specify the level at which discounts should be displayed in imported orders if the Customer Discounts feature is enabled on the Enable/Disable Features (CS100000) form.

Displaying of Discounts in Imported Orders

- On the Order Settings tab of the BigCommerce Stores (BC201000) form, you can select in the Show Discounts As box one of the following options:
 - Line Discounts - Discounts applied to the order are distributed between the sales order lines.
 - Document Discounts - Discounts applied to the order are aggregated.

Note : **Customer Discounts feature** should be enabled on the Enable/Disable Features (CS100000) form.

Order Time Zone: (GMT-05:00) Eastern Time ...

Show Discounts As: Line Discounts

Gift Certificate Item:

Gift Wrapping Item:

Tag Ext. Order with ERP Order Nbr.

Import of Orders with Discounts: Process Activity

Story

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.

Import of Orders with Discounts: Process Activity

Configuration overview for U100 dataset:

- On the Stock Items (IN202500) form, the following stock items have been created for the purposes of this activity:
 - BANJAM96
 - PLUMJAM96

Import of Orders with Discounts: Process Activity

Process overview

Steps	Details
1. Updating Discount-Related Settings	On the BigCommerce Stores (BC201000) form, update the discount-related settings.
2. Defining the First Discount	In the control panel of the BigCommerce store, define the discount.
3. Defining a Second Discount	In the control panel of the BigCommerce store, define the discount.
4. Defining a Third Discount	In the control panel of the BigCommerce store, define the discount.
5. Creating a Sales Order	In the control panel, create a sales order with the automatically applied discounts.
6. Importing the Sales Order	Prepare and Process data for the Sales orders on the Prepare Data (BC501000), Process Data (BC501500) forms
7. Reviewing the Discounts in the Imported Sales Order	On the Sales Orders (SO301000) form, review the imported sales order and applied discounts.
8. Deactivating the Discounts	In the control panel, the discounts will be deactivated.

Figure: The discounts imported from the store

Sales Orders

EO 000077 - Hoppy Place Coffee and Cakes

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD ...

* Order Type: EO * Customer: C000000002 - Hoppy Place Coffee an Ordered Qty.: 4.00
 Order Nbr.: 000077 * Location: L000000001 - Hoppy Wellby Detail Total: 135.30
 Status: Open Contact: Isabelle Bober Line Discounts: 0.00
 * Date: 5/15/2024 * Project: X - Non-Project Code. Document Dis...: 15.79
 * Requested On: 5/15/2024 Description: SweetStore - BC | Order: 114 | Status: Awaiting Fulfillment Freight Total: 0.00
 Customer Ord... Tax Total: 0.00
 External Refer... 114 - SweetStc Order Total: 119.51

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

Disable Automatic Discount Update

Refresh + X Filter X

Skip Discount	Line Nbr.	* 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		15.79	11.670362			Manual	Discounts applied: 3, 2, 1

Lesson 4.4: Synchronization of Taxes

Learning Objectives

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

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

Applicable Scenarios

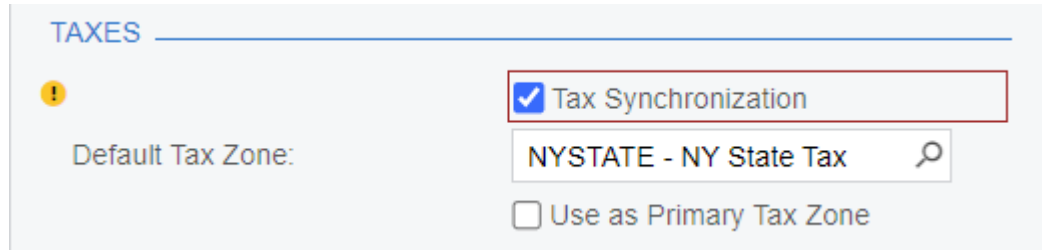
You set up tax synchronization during the configuration of the connection between Acumatica ERP and the BigCommerce store to make sure that taxes collected on online orders are reflected in an imported order and, if necessary, correctly recalculated when a shipment and an invoice are created for the order.

Configuration of Tax Synchronization for Manual Tax Setup

To use Acumatica ERP only for tax calculation and reporting the following steps should be performed:

1. Configure manual tax calculation rules in the BigCommerce store.
2. Implement the tax functionality by configuring a tax zones, tax categories, tax agency and sales taxes.
3. Specify the tax synchronization settings on the Order Settings tab of the BigCommerce Stores (BC201000) form:

- Tax Synchronization
- Default Tax Zone
- Use as Primary Tax Zone
(cleared)



TAXES

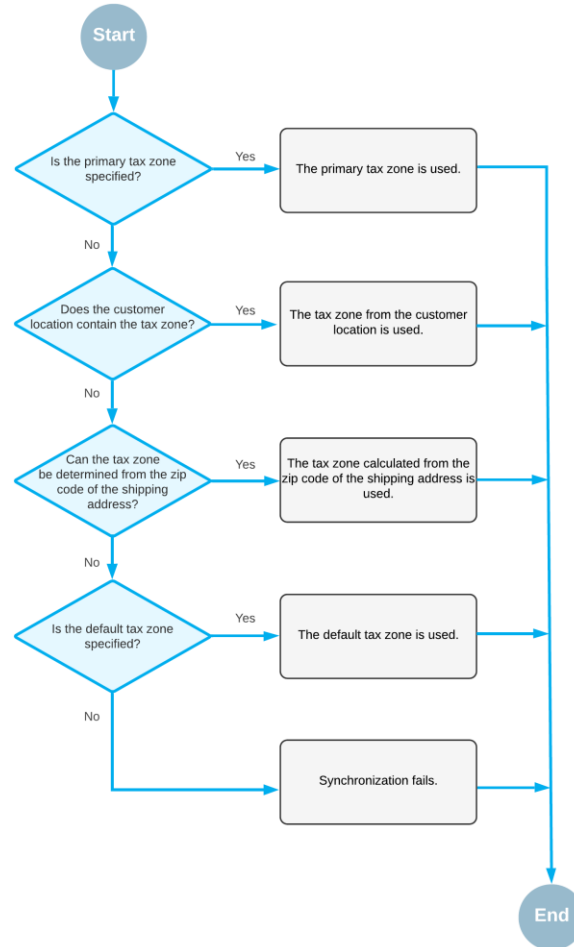
! Default Tax Zone:

Tax Synchronization

NYSTATE - NY State Tax

Use as Primary Tax Zone

Figure: Determining the tax zone for tax calculation



Configuration of Tax Synchronization for Manual Tax Setup

Important to know

- The manual tax configuration should match in the BigCommerce store and in Acumatica ERP.
- Tax categories and taxes in Acumatica ERP should be configured in the same way as tax classes and tax rates in BigCommerce.
- If the tax rates differ, there will be a discrepancy between the amount of the invoice created in Acumatica ERP and the amount of the order created in the BigCommerce store.

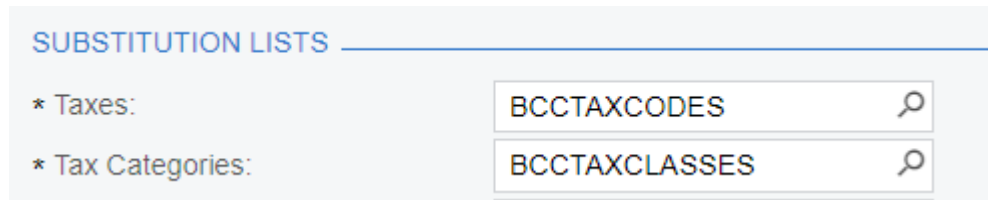
Import of Taxes: Substitution Lists

Substitution List for Taxes

- Taxes whose IDs do not match the IDs of taxes in the BigCommerce store should be mapped with external tax IDs in a substitution list as follows:
 - On the Substitution Lists (SM206026) form, specify tax IDs from the external system in the **Original Value** column. For each external tax ID, add a corresponding tax ID from Acumatica ERP in the **Substitution Value** column.

Substitution List for Tax Categories

- Tax categories in Acumatica ERP should be mapped to the tax classes in the BigCommerce store by using a substitution list as follows:
 - On the Substitution Lists (SM206026) form. In the **Original Value** column, add Acumatica ERP tax categories, and in the **Substitution Value** column add a tax class from the BigCommerce store.



The screenshot shows a section titled "SUBSTITUTION LISTS" with a horizontal line underneath. Below this, there are two rows of input fields. The first row is labeled "* Taxes:" and contains a text input field with the value "BCCTAXCODES" and a magnifying glass icon to its right. The second row is labeled "* Tax Categories:" and contains a text input field with the value "BCCTAXCLASSES" and a magnifying glass icon to its right.

Tax Calculation Mode in Imported Sales Orders

- In BigCommerce, prices of products can be inclusive or exclusive of tax.
- Information about this setting is not passed during the import of sales orders
- If the **Net/Gross Entry Mode feature** is enabled on the Enable/Disable Features (CS100000) form, for sales orders imported from the BigCommerce store, the system inserts Tax Settings in the Tax Calculation Mode box on the Financial tab of the Sales Orders (SO301000) form.

The screenshot shows the 'FINANCIAL' tab of the Sales Orders form. Under 'FINANCIAL INFORMATION', the 'Branch' is set to 'RETAIL - SweetLife Store'. Below this, there are checkboxes for 'Disable Automatic Tax Calculation' and 'Override Tax Zone'. The 'Customer Tax Zone' is set to 'Tax Settings', which is highlighted with a red box. At the bottom, there is a checkbox for 'Bill Separately'.

The screenshot shows the 'Finance' settings page. The 'Standard Financials' section is expanded, showing several options. The 'Net/Gross Entry Mode' option is checked and highlighted with a red box. Other options include 'Multibranch Support', 'Multicompany Support', 'Business Account Locations', 'Multicurrency Accounting', 'Centralized Period Management', 'Volume Pricing', 'Expense Reclassification', 'Tax Entry from GL Module', 'VAT Reporting', 'VAT Recognition on Prepayments', '1099 Reporting', 'Invoice Rounding', and 'Expense Management'.

Import of Taxes: External Tax Provider

Configuration of Tax Synchronization for the External Tax Service

To set up the synchronization of taxes for an external tax provider, you need to perform the following general steps:

1. Configure automatic tax calculation in the BigCommerce store
2. Enable **External Tax Calculation Integration feature** on the Enable/Disable Features (CS100000) form
3. Configure the integration of Acumatica ERP with the external tax provider by using the same account
4. Configure the synchronization of taxes with the BigCommerce store

Import of Taxes: External Tax Provider

Tax Synchronization Settings

- In the Order section, in the Order Type for Import box, select an order type for which the calculation of taxes has been disabled on the Order Types (SO201000) form.
- In the Taxes section, specify the following settings:
 - Tax Synchronization check box - selected.
 - Default Tax Zone - external tax provider tax zone.
 - Use as Primary Tax Zone check box - selected.
- In the Substitution Lists section, specify the substitution list that contains the mapping of tax categories in Acumatica ERP with tax classes in the BigCommerce store in the Tax Category List box.

TAXES

! Tax Synchronization

Default Tax Zone: AVALARA - Avalara Tax Zone

Use as Primary Tax Zone

Handling of Long Tax Names

- Tax names returned by the external tax provider can exceed the maximum allowed length of tax IDs supported by Acumatica ERP (60 characters)
- Long tax IDs are processed as follows:
 - If there is no hyphen in the tax ID, any characters that exceed the maximum length are truncated.
 - Example: **New York City Sales Tax 2024 Groceries and Professional Services**
 - If there is a hyphen in the tax ID, the tax ID is processed as follows:
 - If the tax ID contains the **word SPECIAL**, the part of the ID to the right of the hyphen is used. Any characters that still exceed the maximum length are truncated
Example: Special-**New York City Sales Tax 2024 Groceries and Professional Services**
 - If the tax ID does **not contain the word SPECIAL**, the part of the ID to the left of the hyphen is used. Any characters that still exceed the maximum length are truncated
Example: **New York City Sales Tax 2024** - Groceries and Professional Services

Import of Taxes: Process Activity

Story

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.

Import of Orders with Discounts: Process Activity

Configuration overview for U100 dataset:

- On the Tax Zones (TX206000) form, the NYSTATE tax zone has been configured.
- On the Tax Categories (TX205500) form, the TAXABLE and EXEMPT tax categories have been configured.
- On the Taxes (TX205000) form, the NYSTATETAX tax has been set up.

Import of Taxes: Process Activity

Process overview

Steps	Details
1. Configuring the Sales Tax in BigCommerce	In the control panel of the BigCommerce store, define a sales tax that you will collect on products sold to customers in New York State.
2. Reviewing the Tax Configuration in Acumatica ERP	On the Tax Categories (TX205500), Tax Zones (TX206000), and Taxes (TX205000) forms, review some of the tax-related entities that have been predefined in the U100 dataset.
3. Configuring Tax Synchronization	On the BigCommerce Stores (BC201000) form, specify the tax synchronization settings for your BigCommerce store.
4. Updating the Substitution List for Tax Categories	On the Substitution Lists (SM206026) form, map tax categories in Acumatica ERP to tax classes in the BigCommerce store.
5. Updating the Substitution List for Taxes	Also on the Substitution Lists form, map the sales tax defined in Acumatica ERP to the sales tax defined in the BigCommerce store.
6. Exporting the Stock Items	On the Entities (BC202000) form, update the export filtering settings to include stock items of one more item class.

Import of Taxes: Process Activity

Process overview (continue)

Steps	Details
7. Exporting the Stock Items	On the Prepare Data (BC501000) form, prepare the stock item data for synchronization; on the Process Data (BC501500) form, process the prepared data.
8. Viewing the Synchronized Stock Items in the Store	In the control panel of the BigCommerce store, review the exported items.
9. Creating an Online Order	To make sure that the tax applied to a sales order in the BigCommerce store is imported to Acumatica ERP correctly, create an online order in the control panel of the BigCommerce store.
10. Importing the Sales Order to Acumatica ERP	Import the sales order to Acumatica ERP by using the Prepare Data and Process Data forms.
11. Reviewing the Taxes in the Imported Sales Order	On the Sales Orders (SO301000) form, review the imported sales order.

Figure: Sales order with calculated taxes

Sales Orders

EO 000078 - Hoppy Place Coffee and Cakes

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD ...

* Order Type: EO * Customer: C000000002 - Hoppy Place Coffee an Ordered Qty.: 5.00
Order Nbr.: 000078 * Location: L000000001 - Hoppy Wellby Detail Total: 225.75
Status: Open Contact: Isabelle Bober Line Discounts: 0.00
* Date: 5/15/2024 * Project: X - Non-Project Code. Document Dis...: 0.00
* Requested On: 5/15/2024 Description: SweetStore - BC | Order: 115 | Status: Awaiting Fulfillment Freight Total: 0.00
Customer Ord... Tax Total: 20.04
External Refer... 115 - SweetStc Order Total: 245.79

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS

* Tax ID	Tax Rate	Taxable Amount	Tax Amount
> NYSTATETAX	8.875000	225.75	20.04



Part 5: Scheduling Synchronization and Troubleshooting

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

Applicable Scenarios

You automate the synchronization of entities after you have configured and manually tested the synchronization between Acumatica ERP and the BigCommerce store to ensure that in your production environment, all needed data is exported and imported to the appropriate system in a timely manner.

Scheduled and Real-Time Synchronization

Options to automate the synchronization of data of a particular entity between Acumatica ERP and the BigCommerce store:

- Configure automation schedules for data preparation or for data processing on the Automation Schedules (SM205020) form.
- Turn on real-time synchronization for a particular entity on the Entities (BC202000) form.

Automated Synchronization: Scheduled Synchronization

Scheduled synchronization is the process in which each of the synchronization operations—that is, data preparation and data processing - for an entity is executed by an automation schedule.

Schedule Description	Execution Frequency
<i>Prepare Stock, Non-Stock, and Template Items</i>	Daily, once a day
<i>Prepare Product Availability</i>	Daily, every hour
<i>Prepare Sales Orders</i>	Daily, every 10 min
<i>Prepare Shipments</i>	Daily, every 30 min
<i>Prepare Refunds</i>	Daily, every 20 min
<i>Process Non-Stock Items</i>	Daily, every hour
<i>Process Stock Items</i>	Daily, every hour
<i>Process Template Items</i>	Daily, every hour
<i>Process Product Availability</i>	Daily, every hour
<i>Process Sales Orders</i>	Daily, every 10 min
<i>Process Shipments</i>	Daily, every 10 min
<i>Process Refunds</i>	Daily, every 10 min

Automated Synchronization: Scheduled Synchronization

Steps activate and modify a predefined schedule:

1. Open the Automation Schedules form (SM205020) form.
2. Modify the schedule's settings as follows:
 - On the Filters tab, add a filter condition to include **the store** for which the schedule should be executed.
 - On the Schedule tab, adjust the schedule execution frequency, if necessary.
3. Activate the schedule by selecting the Active check box in the Summary area.
4. You save your changes to the schedule.

Schedule ID: Prepare Sale Orders Active

* Description: Prepare Sale Orders

* Screen ID: Prepare Data * Action Name:

DETAILS SCHEDULE CONDITIONS FILTER VALUES

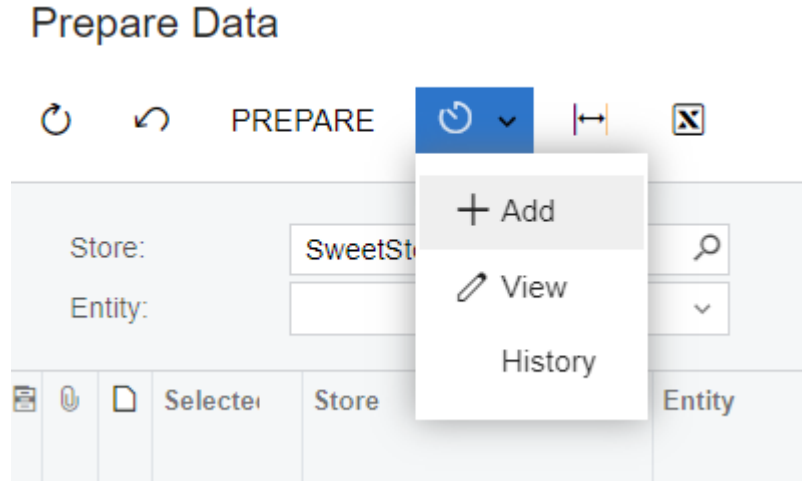
🔄 + × ⇄ ☒

<input type="checkbox"/>	<input type="checkbox"/>	Active	* Field Name	Relativ	Value
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Entity	<input type="checkbox"/>	Sales Order
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Prepare Mode	<input type="checkbox"/>	Incremental

Defining Automation Schedules for Data Preparation

Steps configure and activate a new schedule for data preparation:

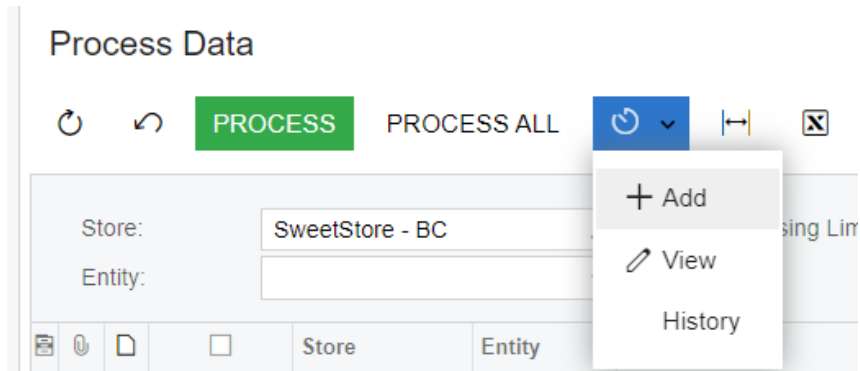
- On the **Prepare Data form**, in the Summary area, specify the BigCommerce store and the data preparation mode.
- In the table, select the unlabeled check box for each entity that should be processed when the schedule is executed.
- On the table toolbar, you click Schedule > Add.
 - Schedules form in a pop-up window.
- Specify a name and description for the schedule, as well as its frequency, expiration information, execution dates and times, and other settings.
- You activate and save the schedule.



Defining Automation Schedules for Data Processing

Steps configure and activate a new schedule for data processing:

- In the Summary area of the **Process Data form**, you specify the BigCommerce store.
- On the table toolbar, you click Schedule > Add.
 - The system opens the Automation Schedules form in a pop-up window.
- Specify a name and description for the schedule, as well as its frequency, expiration information, execution dates and times, and other settings.
- You activate and save the schedule.



Automated Synchronization: Real-Time Synchronization

With real-time synchronization, Acumatica ERP attempts to prepare data or prepare and process data as soon as a change occurs in Acumatica ERP or in the e-commerce system.

Real-Time Mode

- Can be set one the Summary area of the Entities (BC202000) form, in the Real-Time Mode box.
- Specifies how changes to records of the entity should be handled.
- Options: *Prepare*, *Prepare & Process*.

The screenshot shows the 'Entities' form in Acumatica ERP. At the top right, there are links for 'CUSTOMIZATION' and 'TOOLS'. Below the title bar, there are navigation icons and a 'START REAL-TIME SYNC' button. The main form area is divided into several sections:

- Connector:** BigCommerce
- Store:** SweetStore - BC
- Entity:** Non-Stock Item
- Active
- Sync Direction:** Export
- Primary System:** ERP
- Max. Number of Failed Attempts:** 5
- Real-Time Import:** Not Supported
- Real-Time Export:** Stopped
- Real-Time Mode:** Prepare (with a dropdown menu showing 'Prepare' and 'Prepare & Process' options)

Automated Synchronization: Real-Time Synchronization

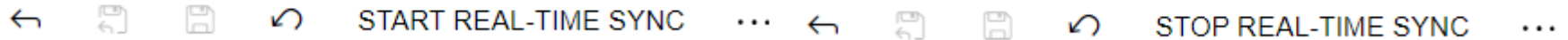
Turning On Real-Time Synchronization

For the selected entity, on the Entities (BC202000) form:

- **To turn on** real-time synchronization **click Start Real-Time Sync** on the form toolbar.
- **To turn off** real-time synchronization **click Stop Real-Time Sync** on the form toolbar.

Entities

Entities



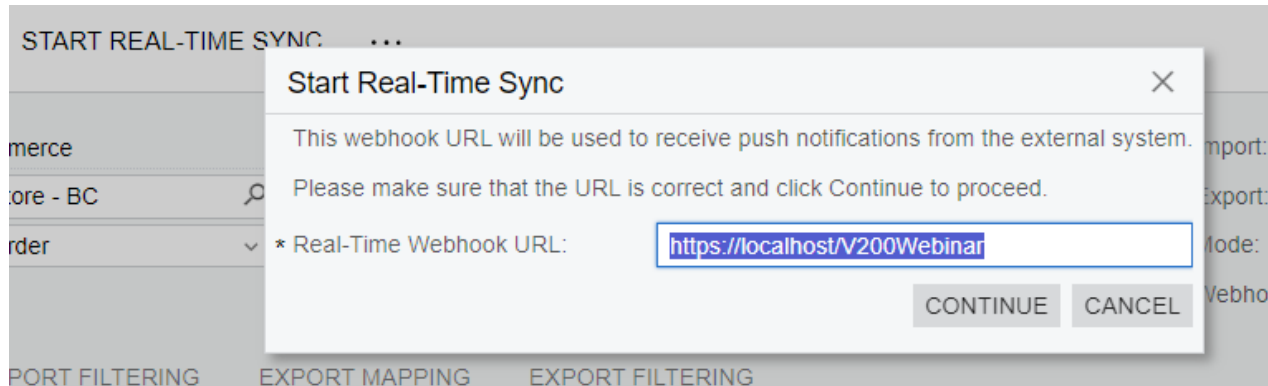
The **status** of the real-time import and export processes for an entity the following:

- **Running:** Real-time synchronization has been turned on.
- **Stopped:** Real-time synchronization is off but can be turned on.
- **Not Supported:** Real-time synchronization cannot be turned on.

Automated Synchronization: Real-Time Synchronization

Webhook URL for Real-Time Import

- Webhook URL is used for Import or Bidirectional sync
- Can be set in In the Real-Time Webhook URL box of the Start Real-Time Sync dialog box
- The webhook URL must be publicly accessible and have SSL/TLS encryption.
- If a webhook cannot be delivered to the webhook URL, real-time import will not work.



Automated Synchronization: Real-Time Synchronization

Limitations of Real-Time Synchronization

- Real-time synchronization in the Import direction might not be reliable. Webhooks may be lost, disabled, or deleted
- The background process makes only one attempt to process each synchronization record placed in the processing queue by the real-time synchronization process.
- Acumatica ERP or an e-commerce system may generate multiple notifications for the same record so incoming notifications are processed with a delay of 15 to 20 seconds.

Automated Synchronization: Recommended Setup (no more than 1,000 orders daily)

Table: Recommended Synchronization Setup for Lower Volumes

Entity	Real-Time Synchronization	Data Preparation	Data Processing
<i>Sales Order</i>	<i>Started</i> <i>Real-time mode: Prepare & Process</i>	Daily, once a night	Daily, once a night
<i>Refund</i>	<i>Started</i> <i>Real-time mode: Prepare & Process</i>	Daily, once a night	Daily, once a night
<i>Shipment</i>	<i>Started</i> <i>Real-time mode: Prepare & Process</i>	Daily, once a night	Daily, once a night
<i>Stock Item, Non-Stock Item, Template Item</i>	<i>Started</i> <i>Real-time mode: Prepare & Process</i>	Daily, once a night	Daily, once a night
<i>Product Availability</i>	<i>Stopped</i>	Daily, every 60 minutes	Daily, every 60 minutes
<i>Other entities</i>	<i>Stopped</i>	Daily, once a night	Daily, once a night

Automated Synchronization: Recommended Setup (more than 1,000 orders daily)

Table: Recommended Synchronization Setup for Higher Volumes

Entity	Real-Time Synchronization	Data Preparation	Data Processing
<i>Sales Order</i>	<i>Stopped</i>	Daily, every 10 minutes	Daily, every 10 minutes
<i>Refund</i>	<i>Stopped</i>	Daily, every 20 minutes	Daily, every 10 minutes
<i>Shipment</i>	<i>Stopped</i>	Daily, every 30 minutes	Daily, every 10 minutes
<i>Stock Item, Non-Stock Item, Template Item</i>	<i>Stopped</i>	Daily, once a night	Daily, every 60 minutes
<i>Product Availability</i>	<i>Stopped</i>	Daily, every 60 minutes	Daily, every 60 minutes
<i>Other entities</i>	<i>Stopped</i>	Daily, once a night	Daily, once a night

Automated Synchronization: To Configure a New Automation Schedule

Story

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).
- 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 Configure a New Automation Schedule

Process overview

Steps	Details
1. Scheduling of the Automatic Data Preparation for Customers	On the Prepare Data (BC501000) form, define the conditions for preparing data of the Customer entity.
	On the Automation Schedules form, create an automation schedule to start data preparation for the Customer entity once a day.
2. Scheduling of the Automatic Data Processing for Customers	On the Process Data (BC501500) form, define the conditions for processing data of the Customer entity.
	On the Automation Schedules form, create an automation schedule to start data processing for the Customer entity once a day.

Automated Synchronization: To Turn On Real-Time Synchronization

Story

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 real time 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 Turn On Real-Time Synchronization

Process overview

Steps	Details
1. Enabling Real-Time Synchronization for Shipments	You will turn on real-time synchronization for the Shipment entity on the Entities (BC202000) form so that the system immediately exports the changes in shipments to the BigCommerce store.

Automated Synchronization: To Activate a Predefined Business Event

Acumatica ERP provides a set of predefined business events that can be activated to trigger the sending of an email notification to the administrator of an online store about aborted synchronization records.

- Predefined business events are available for entities : **Sales Order, Payment, Shipment, Refund.**
- The notification is sent when the commerce connector fails to process a synchronization record related to the entity if the **maximum allowed number of failed attempts has been exceeded.**
- Maximum allowed number of failed attempts can be set on the Entities (BC202000) form or on the BigCommerce Stores (BC201000) form.
- Steps to activate triggering of email by business events:
 - On the Connection Settings tab of the BigCommerce Stores form, specify the administrator of the store in the Administrator box.
 - On the Business Events (SM302050) form, activate the needed business event by selecting the Active check box in the Selection area for the event.

Automated Synchronization: To Activate a Predefined Business Event

Table: Predefined Business Events for Aborted Synchronization Records

Business Event ID	Description	Generic Inquiry	Notification Template
<i>BCAbortedOrder</i>	Triggers notifications for aborted synchronization records of the <i>Sales Order</i> entity	<i>BC-DB-AbortedOrders</i>	<i>Aborted Order Notification</i>
<i>BCAbortedPayment</i>	Triggers notifications for aborted synchronization records of the <i>Payment</i> entity	<i>BC-DB-AbortedPayments</i>	<i>Aborted Payment Notification</i>
<i>BCAbortedRefund</i>	Triggers notifications for aborted synchronization records of the <i>Refund</i> entity	<i>BC-DB-AbortedRefunds</i>	<i>Aborted Refund Notification</i>
<i>BCAbortedShipment</i>	Triggers notifications for aborted synchronization records of the <i>Shipment</i> entity	<i>BC-DB-AbortedShipments</i>	<i>Aborted Shipment Notification</i>

Automated Synchronization: To Activate a Predefined Business Event

Story

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.

Automated Synchronization: To Activate a Predefined Business Event

Configuration overview for U100 dataset:

- On the Email Templates (SM204003) form, the Aborted Synchronization Record notification template has been defined.
- On the Users (SM201010) form, the stevens user record has been created.

Automated Synchronization: To Activate a Predefined Business Event

Process overview

Steps	Details
1. Specifying the Store Administrator	On the BigCommerce Stores (BC201000) form, specify the store administrator who should receive email notifications about aborted synchronization records.
2. Activating the Business Event	On the Business Events (SM302050) form, activate a predefined business event
3. Reviewing the Notification Template	On the Email Templates (SM204003) form, review the notification template used for notifications about aborted sales orders.

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

Applicable Scenarios

You monitor day-to-day activities and track failed and aborted synchronization records to ensure that all entities are synchronized between Acumatica ERP and the BigCommerce store correctly and in a timely manner.

The Commerce Sync Monitoring Dashboard

Widget	Description
Aborted Records	The number of synchronization records that have the Aborted status.
Failed Records	The number of synchronization records with the Failed status.
Unpaid Orders	The number of imported or exported orders that do not have payments applied
Not-Yet-Shipped Orders Placed >7 Days Ago	The number of orders that were created more than 7 days ago and still not shipped.
Total Revenue	The sum of the order total amounts (in the base currency)
Prepared for Processing	The number of synchronization records with the Prepared status
Processed in Last 7 Days	The number of synchronization records that have been processed in the last 7 days.
Total Processed	The number of synchronization records that have been processed.
Sales Orders	A line chart that shows the number of sales orders imported per day
Processed Records	A bar chart that shows the number of synchronization records that have been processed for each entity type.
Aborted Records	A table that shows the synchronization records with the Aborted status

The Sync History Form

The Sync History (BC301000) form shows synchronization status of all records related to a particular Entity and has filter tabs:

Tab	Description
All Records	all synchronization records
Ready to Process	active synchronization records that have the Prepared or Failed status
Failed	active synchronization records that have the Prepared or Failed status
Processed	active synchronization records that have the Processed status
Skipped	active synchronization records that have the Processed status
Aborted	active synchronization records that have the Processed status
Deleted	active synchronization records that have the Processed status
Filtered	active synchronization records that have the Processed status
Invalid	active synchronization records that have the Processed status
Inactive	synchronization records for entities that have been deactivated

Troubleshooting: To Prepare the System

In this activity, you will make changes to the configuration of the Acumatica ERP instance and the BigCommerce store that will prevent the system from successfully synchronizing the entities.

You will use the results of performing this activity—that is, synchronization records with the *Failed* status—in the subsequent activity.

Process overview

Steps	Details
1. Creating a Stock Item	On the Stock Items (IN202500) form, create two stock items by copying two existing stock items.
2. Synchronizing the Stock Items	On the Prepare Data (BC501000) form, prepare the Stock Item entity for synchronization. On the Process Data (BC501500) form, process the prepared records for the two stock items (one that you copied and one that you created).

Troubleshooting: To Monitor E-Commerce Operations

Story

Suppose that you are 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 the 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.

Troubleshooting: To Prepare the System

Process overview

Steps	Details
1. Reviewing the Commerce Sync Monitoring Dashboard	On the Commerce Sync Monitoring dashboard, you will review the widgets and identify a synchronization record that the system had failed to process.
2. Updating the Stock Item	On the Stock Items (IN202500) form, you will fix the synchronization issue.
3. Processing the Failed Synchronization Record	On the Sync History (BC301000) form, you will manually resynchronize the synchronization record.



Thank you!