
LightspeedEVO

50belowARI Web Order Integration

Lightspeed includes an integrated utility in parts invoicing to download orders from your dealership website shopping cart. Some initial setup is required. Some components such as supplier and customer mapping to existing entries in your Lightspeed system are done once as they are encountered in an order, and are then remembered by the system.

To integrate your shopping cart download to Lightspeed:

- You must be on LightspeedEVO version 5.7 or later.
- Your ADP Lightspeed DMS must be licensed by ADP Lightspeed to access the shopping cart download interface.

Your steps to integration include:

- Your Lightspeed DMS preferences must be set up with website communication authorization and access information.
- Your method of payment type mapping must be set up in Lightspeed Preferences.
- You must map the tax types used on your website to those set up in your Lightspeed system.
- You should also set up “ship via” preferences for the shipping carriers that you will use to ship parts and accessories to the Web order customers.
- Lightspeed users must be granted access to Web order invoicing in their security profile.

These and related steps are explained on the following pages.

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Web Order Preference Setup

Web Commerce should be enabled and setup in Lightspeed under System – Preferences – Web Orders. Listed below are the standard setups for 50belowARI:

1. Enable: should be checked
2. URL: <https://api.endeavorsuite.com/evo>.
3. User/Password: Dealer specific please contact 50belowARI
4. Content Type: XML
5. Request and Retry Interval: 15 Minutes
6. Machine Address: from any client pc populate the **Machine Address** by selecting the notepad icon to the right of the machine address field. Select Ok on the Confirm Prompt. This is a global setting and only needs to be setup once from any client pc.

The Web Commerce Method of Payment should also be mapped in Lightspeed under System – Preferences – Web Orders.

Credit card information is not transferred to your Lightspeed system but your web method of payment is integrated so that when the Web order is brought into Lightspeed the system recognizes the correct method of payment and automatically assigns it.

You should have already defined a method of payment equivalent to each payment type available on your website. These methods of payment types are separate from your in-store credit card method of payment selections. For example, Web Visa, Web Mastercard, etc.

Mapping for the payment types taken on your website to the equivalent payment types in Lightspeed is also done on the Web Orders screen in Preferences.

1. Go to the **System – Preferences** menu. On the Preferences screen go to **Location – Web Orders**.
2. For each of the Web Commerce Method of Payment types listed, click the dropdown arrow to select the matching web payment type in Lightspeed.

If you have questions with the System Preferences setups please contact 50belowARI support or Lightspeed support.

Enable User Access to Web Order Invoicing

You will have to enable the security access for users who will invoice the Web orders. If you do not have access to System Security please talk to your Lightspeed System Administrator.

To allow Web order invoicing:

1. Go to the **System – Security** menu and open the security record of the user to enable.
2. Expand the **Parts – Parts Invoice** security menu tree.
3. Check the **Import Web Orders** function.

Tax Mapping

Your website provider also provides applicable local tax options when the site visitor creates a Web order. These taxes need to be mapped to the tax types that you have defined within the sale types in your Lightspeed system.

After you have completed and tested your *System Preferences* setup (above) to ensure that your website is communicating with Lightspeed you can do the following to map your tax/sale types.

1. Go to the **Parts – Lists – Web Order Taxes** menu.
2. Click the **Web Refresh** button at the top of the *Web Order Tax* screen. This brings the tax types used on your eCommerce site into Lightspeed for mapping.
3. For each line in the Web order tax mapping table, click the **Sale Type** column to select the correct type to apply for the tax on that line.
4. After entering a Sale Type mapping for each line click **Save**.

Shipping Carriers and Methods

The parts invoice includes fields for shipping information that are used when shipping Web orders. You can list the carriers you use and the shipping methods that apply in your Shipping Services list for easy selection in these fields.

To set up your shipping information:

1. Go to the **Parts – Lists – Shipping Services** menu to display the shipping service list.
2. Click **New** to enter a new shipping service.
3. Enter the shipping code and name of the shipping service. For example, code *UPS* and name *United Parcel Service*.
4. To enter the shipping methods used by a carrier, click the **New** button below the Shipping Methods area and enter the method, such as *Ground*. Repeat to enter all of the available methods for the carrier.
5. When you have finished entering your shipping carrier and methods, click the **Save** button at the bottom of the screen.

Enable Shipping Notification Email

If you wish to have an automatic email sent by Lightspeed when you ship the order you must set the preference to do so.

1. Go to the **System – Preferences** menu.
2. On the Preferences screen go to **Parts – Ordering and Receiving**.
3. Check the **Order Shipment Email** box.

Supplier Mapping

No action needed for setup. When downloading your Web Order invoices, Lightspeed displays a Web Order Fix dialog where you can click Fix to match the supplier codes from your eCommerce site to those in Lightspeed. This is needed only the first time each supplier code is encountered. The supplier codes used by your site provider may be different from the supplier codes used in your Lightspeed system, so you must confirm or manually map the website supplier to the corresponding one on your Lightspeed system the first time. Once this selection is made the system applies it going forward.

Customer Mapping

No action needed for setup. The system will match the customer on the Web order to a customer record on your system if a match exists. Otherwise, it displays a dialog where you can select the matching customer or choose to create the customer record from the Web Order information. There is also an option to use the web information instead of the local customer information. This is useful if the customer specified a different shipping address on the Web order but you want to retain the current customer record in your system. This option applies the web information on the invoice, but retains the link to the customer for order history and reporting.

Note that the most effective way to ensure a good match is to collect complete and accurate customer information on all of your customers when you enter them into your Lightspeed system. Web customers that have also previously visited your dealership are most easily found if the counter person who entered them gathered complete information.

Processing the Web Orders

After the initial integration setup your Web orders can be imported from your dealership website directly to the Lightspeed invoice.

Since the web shopping cart has already handled the transaction and taken payment the imported orders include the parts detail, customer and shipping information, type of payment that was taken and the amount. If pricing for the items on your Lightspeed system differs from that on the Web order an adjustment is automatically entered.

When the order is imported the system looks up a matching customer and matching line items to create the Lightspeed invoice. If an exact match is not found for each a lookup is presented so you can match or add customer records and part/supplier records as needed.

You then complete the parts invoice as usual, including special orders if needed and use the new Shipping Inquiry function to track the orders.

Web Order Invoicing

On the Parts invoice screen the Web Orders button shows the number of current outstanding line items (not orders) below the button title. If there are no orders present the button is inactive. If there are Web orders present:

1. Click the **Web Orders** button to display the list of current unprocessed orders in the shopping cart of your eCommerce site.
2. On the Outstanding Web Orders list dialog click the Web Orders button in the lower-left corner to ensure that all present orders are displayed. (The list is automatically updated at preset intervals, so this ensures that all recent orders are displayed.)
3. Highlight the order you want to process and then click the **New Invoice** button. The system then checks for a matching customer and matching inventory items. If a match is not found a *Web Order Issues* dialog is presented.
4. To void the web order select the **Void** button
5. To exit Outstanding Web Orders select the **Cancel** button. This will allow you to return at a later time to process the outstanding web orders. Selecting cancel will not void the outstanding web orders.

No customer or differing customer data message:

If the Web Order Issues dialog is presented with a no customer found or differing customer data message, highlight the customer and then click the **Fix** button to go to the *Link Web Order Customer* lookup.

Note that there may be two customer listings if both the invoice customer and ship-to customer were entered on the Web order and not matched in Lightspeed.

In the Link Web Order Customer lookup there are two options, you can search for an existing customer match or you can create a new customer record:

- **Existing Customer** – Use the **Search** fields to locate an existing customer by name or address matching.

Match the Customer: If you locate and highlight an equivalent customer record, click the **Link Customer** button to tie the Web customer to the Lightspeed record.

If there are differences the dialog is re-posted with that message and the Fix button. After clicking **Fix** you have the following options:

Use Web Order Customer – This will update your selected Lightspeed customer record with the Web customer entry detail.

Use System Customer -- This retains your current Lightspeed customer information.

Keep Differing Data, which keeps the Web Order information on the parts invoice, but does not update your Lightspeed customer record. This is especially useful for a custom ship to address. Note that this option does still link the purchase to the selected Lightspeed customer for history and reporting purposes.

- **New Customer** – If the search did not find a matching customer already in your Lightspeed system, click the **New Customer** button to create a new customer record using the Web Order customer information.

No Supplier Record message:

If the Web Order Issues dialog is presented with a no *Supplier* found message, highlight the supplier message line and then click the **Fix** button to go to the supplier lookup. The search is auto-populated and locates the matching supplier code in your system. If the codes are different you will need to delete the search entry to list your suppliers to locate the match.

- If a matching supplier record is found make the selection to link the supplier.
- If you have a supplier on your website supplier options for which no matching Lightspeed supplier is found, then cancel the lookup. You will need to create the supplier record in your Lightspeed Parts – Lists – Suppliers list. After creating the supplier record return to the order and repeat the search to select and link to the newly created supplier.

6. After matching the customer and addressing any other errors if needed, process and cashier the invoice as usual, including any special orders that are needed. If there is a difference between the amount charged on the website and your normal invoice pricing the parts are discounted on the invoice. There may also be small tax calculation differences.

If payment negotiation is needed for these adjustments, unfulfilled or superseded items, or any other reason you would need to contact the customer to work out the payment difference and take payment on the invoice as a second method of payment at cashiering.

Cashiering the invoice sends payment information back to the website. During the Web order placement the payment amount was preauthorized. When the cashied amount is returned to the website the credit card or other payment method is applied. You can reduce the web payment below the preauthorized amount, but you cannot increase it.

7. Package and ship the order. All invoices with a “ship to” entry are tracked in the Shipping Inquiry function. When you do the shipping add the tracking number and other shipping information to move the order to Completed status in shipping.

Ship now or later? If the order is packaged and shipped during the invoicing process you can click the *Ship To* tab in the customer information to see the shipping address. You can also enter the **Tracking Number** at this time, before cashiering the invoice.

If the Web order shipping will be handled after cashiering you can use the **Shipping Inquiry** function (see below) to manage the workflow and enter the tracking number when the order is shipped.

Note that the cashied invoice includes the Web Order Number and any shipping information that was included with the order.

Shipping Inquiry

The Shipping Inquiry function can be used with or without Web order integration, but is particularly useful to dealers processing Web orders. Using the Shipping Inquiry you can track items invoiced for shipping from write up to completion.

Any time “Ship to” information is entered on an invoice the shipping inquiry can be used to track the internal status (ordered, received) and record the tracking number when you ship the package.

On the Shipping Inquiry screen the list is filtered by order status. The invoice is listed in the top section and the individual items are listed for the highlighted invoice in the lower section so that you can see the status of each item. The invoice status changes when all of the items on it reach the next status.

- **Processing:** When an invoice that includes special order items is cashiered with a Ship To address entered it is added to the shipping inquiry with status “Processing.”
- **Ordered:** When a special order item on the invoice is placed on a purchase order the status for that item becomes “Ordered.” When all special order items on the invoice are ordered the invoice status becomes Ordered.
- **Received:** Special order(s) are received but not yet invoiced as “picked up”.
- **Ready to Ship:** Cashiered invoices with no special order items or those with all special order items “picked up” will show as Ready to Ship if the shipping information entered does **not** include the Shipping Method and Tracking Number.
- **Completed:** If the items are all sold and special orders all picked up and the shipping method has been selected and the Tracking number entered, then the invoice shows as Completed.

Note that you can enter the Tracking number at any time after items are sold or special order items are picked up. For special orders the Shipments list shows the original invoice and the special order pickup invoice(s) as well. This enables you to enter separate tracking numbers for the pickup invoice if it is split in shipping.

To use Shipping Inquiry for Order Processing

1. Go to the **Parts - Shipping Inquiry** menu.
2. Check the box or boxes in the *States* area for order status that you are interested in. For example, if you want to check for items that need to be ordered you would check only the Processing box. To list only orders to be packaged for shipping you would check only the Ready to Ship box.
3. When you process your shipments, highlight the invoice being shipped at the top. The items in the invoice are listed below. The Shipments area lists the original and SO pickup invoice if applicable. Highlight the Shipments invoice and then click the **Tracking Number** button to enter the shipping service, shipping method, and the tracking number.

Customer Inquiries

You can also use the shipping inquiry function as a lookup to quickly check status of a customer order. Use the customer search with all of the status types selected to show all orders. Line item detail for each item on the highlighted order is shown at the bottom. The invoice numbers are also hot links to the invoice detail.

Tip: When you access the invoice from a link or use the Reprint Invoice function, the shipping information added after cashiering is shown on the invoice.