Download Web Orders
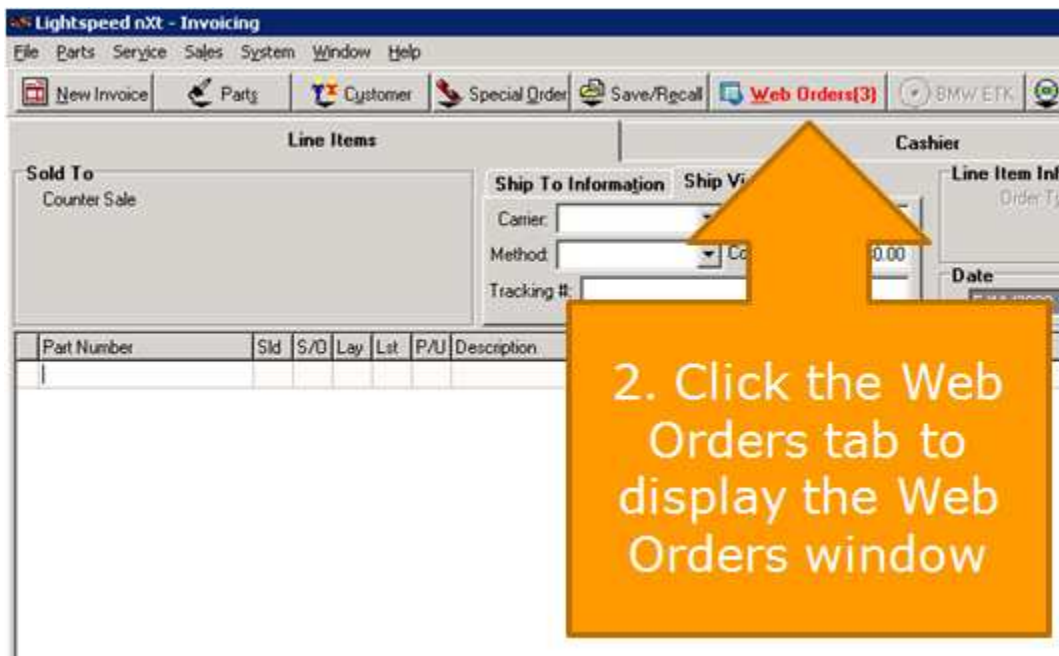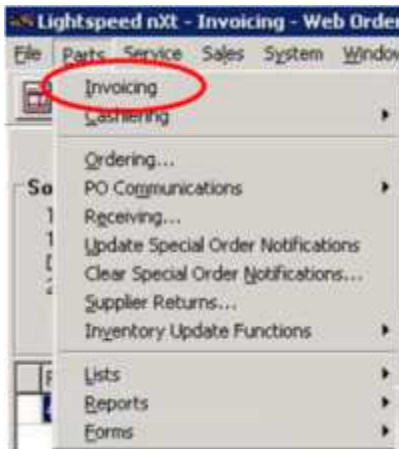
- To start with, the dealer will need to log into Lightspeed and check for whether there are orders that need attention.
- A small procedure needs to be done in order to get the information for Web orders.
- This process will take place entirely within Lightspeed.

  o Log into Lightspeed NXT, and go to Parts > Invoicing

2. Click the Web Orders tab to display the Web Orders window

3. In the Web Orders window, click the "Get Web Orders" button. This adds any new orders from the 50 Below site to the list in the upper left section of the Web Orders window.

4. Continue to process the orders… or close the Web Orders window by clicking the "X" in the upper-right corner to hold them for later processing.

If the Web Orders don't properly display the part number, description, quantity, price, comment, supplier name, etc. in Lightspeed, there may be a problem with how the dealer's suppliers are configured. The dealer should check the Supplier Mapping Table, referenced in the prior training unit.

What if a customer orders a product that isn't in the dealer's Lightspeed inventory?

- Assuming the dealer has already mapped their suppliers, there are going to be two options.

    - The dealer contacts theirLightspeed representative about adding current "Price Books" that correspond to the brands that they offer on their 50 Below Web site.

    - The dealer adds the product in by manually entering it into their Lightspeed inventory…

2. Map the customer to the customer list

- The dealer is going to want to do one of two things here.
    - Either match up the customer with the listings in their Lightspeed system,
    - or create a new entry for a brand new customer.
- Please note that Lightspeed has a search function that will help find matches to things that a customer may have entered differently, such as names, abbreviations, and so on.
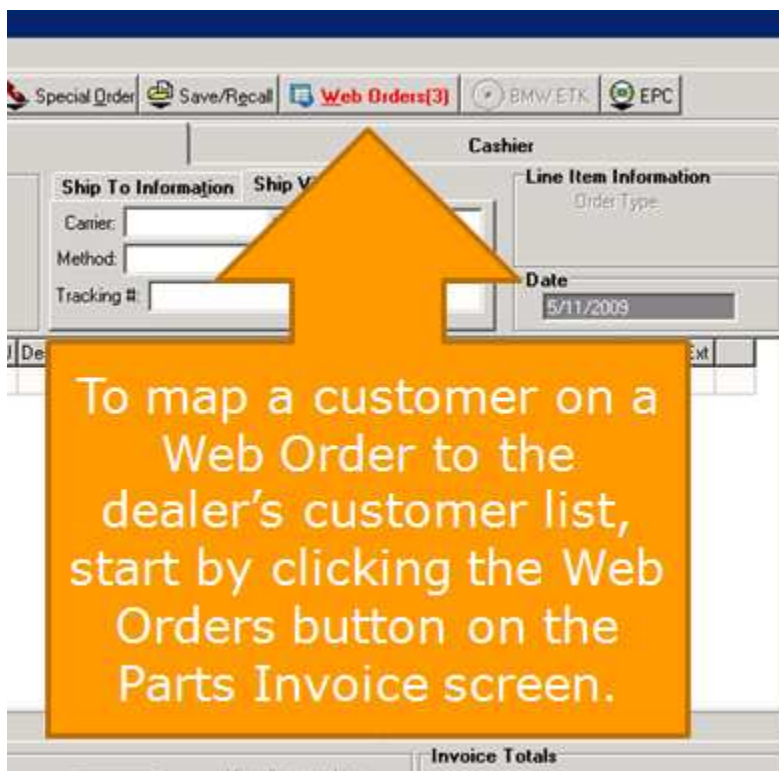
Web Orders

Show Only Mapped Orders
Show Only Unmapped Orders

Invoice Web

	✔	Order #	Status	Date Placed	DateComple
▶		674112	New	3/23/2009 10:40:32 AM	
	✔	697811	New	4/6/2009 4:29:35 PM	
	✔	726651	New	4/23/2009 8:06:00 PM	Test
	✔	726661	New	4/23/2009 8:14:52 PM	Tess

Click an unmapped order in the list (look for the lack of a check mark in the first column.

Web Order Lines | Customer Mapping

	Part Number	Description	Qty Ordered	Each Price	Comment	WO Supplier Name
▶	0436-299	60-in. Sp	1	$45.95	PLOW BLADES	Arctic Cat

Then, click the Customer Mapping tab.

Web Orders

Web Orders

	✔	Order #			To Middle Initial
	✔	67411			E
	✔	69781			\
▶	✔	72665			
	✔	72666			-

et Web Orders(3)

This displays the customer mapping information with the customer-entered information in the top half, and the Lightspeed data in the bottom half.

Web Order Lines | Customer Mapping

Web Order Customer

First: Test Initial: Last: Terr
Address: 1345

City: Duluth State: GA Zip: 55802
County: Home: 218.555.1212 Email: bholecek@50below.com

Lightspeed Customer

First: Test Initial: Last: Terr   [Overwrite With Web Order Info]
Address: 1345

City: Duluth State: GA Zip: 55802
County: Home: 218.55

[Open Mapping]

Click the Open Mapping button to display the Lightspeed mapping options.

Web Orders

☐ Show Only Mapped Orders
☐ Show Only Unmapped Orders

Web Orders

[Invoice Web Order] [Cancel Web Order] [Get Web Orders(3)]

	Order #	Status	Date Placed	DateComplete	Bill To First Name	Bill To Middle Initial
✎	674112	New	3/23/2009 10:40:32 AM		James O.	
✎	697811	New	4/6/2009 4:29:35 PM		Jason	
✎	726651	New	4/23/2009 8:06:00 PM		Test	
✎	726661	New	4/23/2009 8:14:52 PM		Tess	

Click the Search button at the bottom of the screen to search for likely matches to customer records. This may take a moment.

If the dealer already knows that the customer is in their database, they can use the Manual Map button to look them up by name.

☐ Distance
○ Pattern Matching

☑ Address 1
☐ Address 2
☑ City
☐ State
☐ Zip
☑ Phone
☑ Email

[Open Mapping] [Search] [Map] [Manually Map] [Add Customer] [Cancel]

Customer Lookup

Quick Search
Terr, Test

Search/Sort By
Full Name

Number	Name	Address	City	State	Zip	Phone	Work Ph
56	Terr, Test	1345	Duluth	GA	55802	218.555.1212	
9	Ting, Tess	1 East First Street	Duluth	Minnesota	55802		
57	Ting, Tess	1111	Duluth	MN	55802	218-555-1212	
58	Tugin, Tess	2222	Los Vegas	NV	55802	218-555-1212	
33	Weaver, Jason	5184 Wiley Post way	Salt Lake City	Utah	84116	8015197580	
35	Weaver, Jason	5184 Wiley Post Way	Salt Lake City	Utah	84116	8015555555	
40	Weaver, Jason	5184 Wiley Post way	Salt Lake City	Utah	84116	8887779999	
49	Weaver, Jason	123 Some Street	Salt Lake City	Utah	84144	801-555-5555	
50	Weaver, Jason	4125 Some Place	Salt Lake City	Utah	84108	801-555-5555	
52	Weaver, Jason	5184 Wiley Post Way	Salt Lake City	Utah	84116	801-555-5555	

[New] [Edit] [Clear]   [✓ OK]

Web Orders

Show Only Mapped Orders
Show Only Unmapped Orders

Web Orders

	Order #	Status	Date Placed	DateComplete
✓	674112	New	3/23/2009 10:40:32 AI	
✓	697811	New	4/6/2009 4:29:35 PM	
✓	726651	New	4/23/2009 8:06:00 PM	
✓	726661	New	4/23/2009 8:14:52 PM	

Web Order Lines | Customer Mapping

Web Order Customer

First [Test] Initial [ ] Last [Terr]

Address [1345]

City [Duluth] State [GA]

County [ ] Home [218.555.12]

Lightspeed Customer

First [Test] Initial [ ] Last [Terr] [Overwrite With Web Order Info]

Address [1345]

City [Duluth] State [GA] Zip [55802]

County [ ] Home [218.555.1212] Email [bholecek@50below.com]

[Open Mapping]

Now the system will return the Customer Mapping information, showing the Lightspeed customer information at the bottom. A checkmark now shows next to the order indicating that the customer mapping is complete.

Web Orders

Show Only Mapped Orders
Show Only Unmapped Orders

[Invoice Web Order] [Cancel Web Order] [Get Web Orders(3)]

Web Orders

	Order #	Status	Date Placed	DateComplete	Bill To First Name	Bill To Middle Initial
✓	674112	New	3/23/2009 10:40:32 AI		James O.	
✓	697811	New	4/6/2009 4:29:35 PM		Jason	
✓	726651	New	4/23/2009 8:06:00 PM		Test	
✓	726661	New	4/23/2009 8:14:52 PM		Test	

If the dealer finds a record match, they can select the customer and click the "Map" button to map the Lightspeed customer to the order.

If there is no match, the "Add Customer" button will add that customer's data to the Lightspeed customer list.

☑ Email

[Open Mapping] [Search] [Map] [Manually Map] [Add Customer] [Cancel]

If the record is the same but more complete on the Web entry side, the dealer should choose to overwrite the old record.

If the records differ, the dealer will want to determine whether they want to keep both as-is or make their local record match the Web entry.

3. Locate and Package Web Order Products

- The next task will be to locate the products the customer has ordered and prepare them for shipment.

- There will be a couple different ways to go about it that will be detailed here – as with the previous steps, this all happens within Lightspeed.

One method is to click the order in the top of the Web Order screen to display the requested products on the "Line Items" tab. Print the screen or simply view it to use as a "pick list" to pull and package the products.

- Another method, which the dealer may find easier and more informative, is to open the Parts Invoice screen and print a "pick ticket." The invoice screen makes more detailed product information available to the dealer. (The dealer should then cancel the invoice so it remains in the Web Order list until they are actually ready to invoice the packaged products and send the shipment.

To print a pick ticket, the dealer must do the following…

1. Click the Web Orders tab to display the Web Orders window

2. Select the order to invoice and then click the Invoice Web Order button.
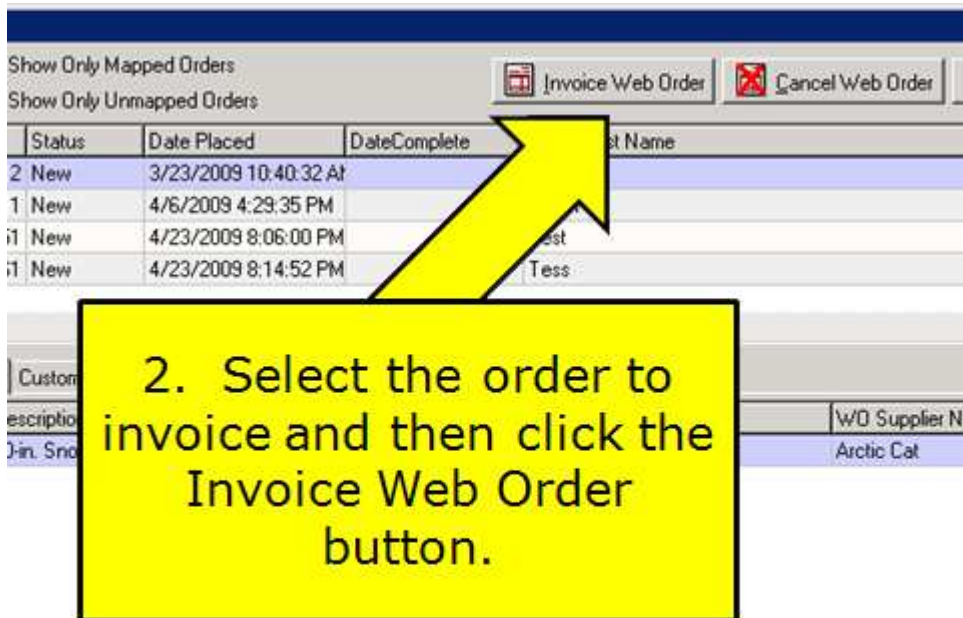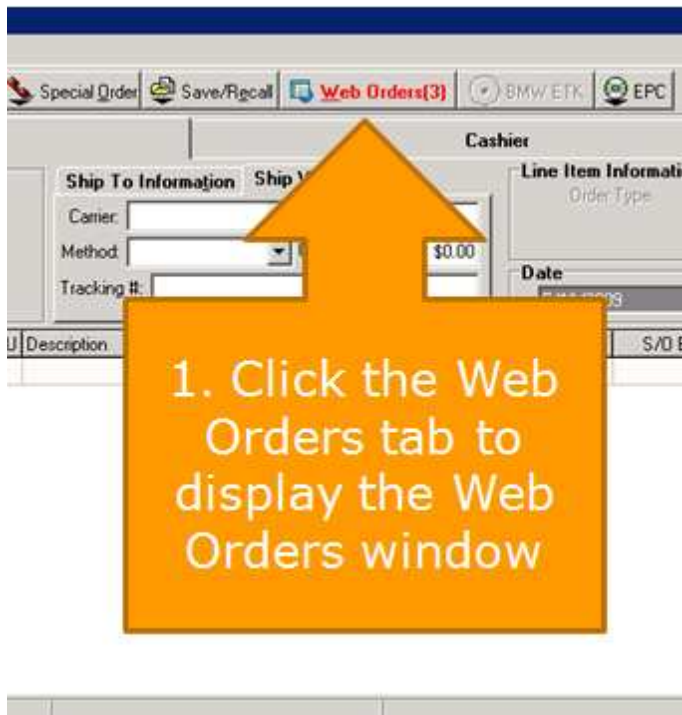
Method: 3 Day Select   Cost: $0.00

Date
5/11/2009

cription	Regular Price	Disc Price	Extension	*0 Ext
UMINUM RIMS	$130.95	$102.95	$102.95	

3. Click the Pick Ticket button at the bottom of the invoice screen (note the print icon)

0
Miscellaneous Line
Not In Inventory
Similar Parts   Shipp.. $5.00
Superseded Part
Same Part Number   .95
0    $0.00 ...
Invoic.. $107.95
Sales Tax   Web Order To.. $120.09

🖨 Part Quote   🖨 Pick Ticket   Cashier ▶

Method: 3 Day Select   Cost: $0.00

Extension	*0 Ext
$102.95	

Do not go to Cashiering! The dealer should close the invoice and choose the "cancel" option upon exit.

Invoice Totals

73	Supplier	AC	Sugg Sell	0
73	Category	PAC	Order Unit	
00	Bin 1		Qty Per Unit	0
	Bin 2			
0	Bin 3		Tax Category	Sales Tax

Miscellaneous Line
Not In Inventory
Similar Parts
Superseded Part
Same Part Number

Shipping/Handling $5.00
Discount $28.00
Subtotal $107.95
Tax $0.00 ...
Invoice Total $10?...
Web Order Total

🖨 Part Quote   🖨 Pick Ticket   Ca...

[Working]

The dealer generally will want to cancel the invoice used for printing the pick ticket. It is best to not casher it until after the shipment is prepared and ready to ship. They may want to enter the shipping information before cashiering; they may not know all of

this information until the package is actually ready to ship.

Because it's possible to accidentally import a held invoice into another invoice screen and lose the customer information, or forget to place an invoice back on hold if it's not processed immediately, it's best not to use held invoices as part of the Web order fulfillment process.

4. Invoice the Web Order Parts

- After the dealer has packaged all of the available products, they will need to create the parts invoice and ship the parts.
- Because order is a hand-off from another system, the customer is going to have certain expectations on the purchase based on their check-out total – if things get changed at this point, the dealer is going to need to make sure the customer is aware of it.
- Our process starts from the Parts Invoice screen…
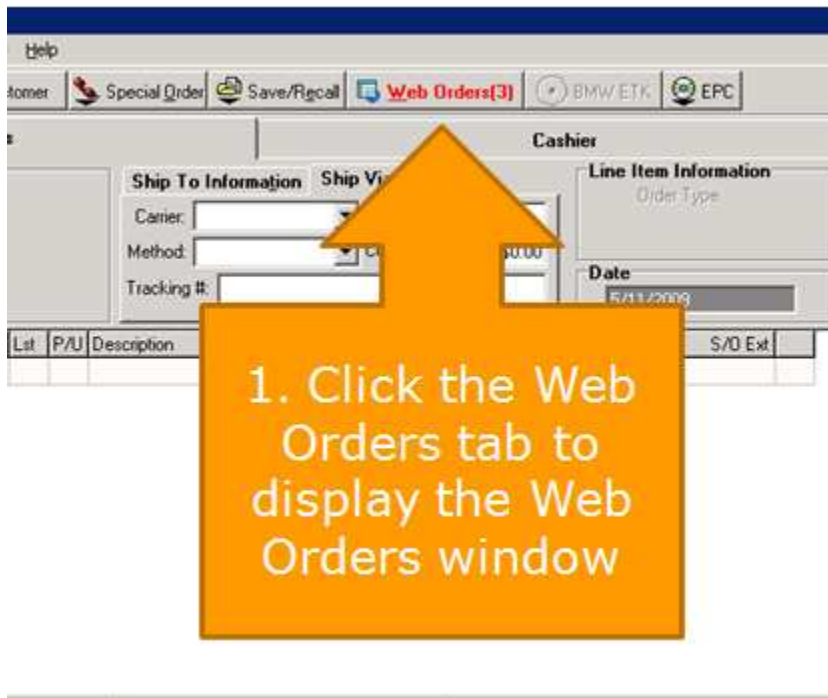
Show Only Mapped Orders
Show Only Unmapped Orders

	Status	Date Placed	DateComplete		Name
12	New	3/23/2009 10:40:32 AI			
11	New	4/6/2009 4:29:35 PM			
51	New	4/23/2009 8:06:00 PM			
61	New	4/23/2009 8:14:52 PM		ess	

Invoice Web Order   **Cancel Web Order**

Customer		
Description		WO Supplier Nan
50-in. Snow		Arctic Cat

2. Select the order to invoice and then click the Invoice Web Order button.

Lightspeed nXt - Invoicing - Web Order 726651

File   Parts   Service   Sales   System   Window   Help

New Invoice | Party | Customer | Special Order | Save/Recall | Web Orders(3) | BMW ETK | EPC

Line Items

Sold Now

Taxable	Non-Tax	Discount	Totals
$149.95	$0.00	$20.00	$129.95
		Shipping/Handling	$5.00
		Gift Cards	$0.00
		Tax	$0.00
		Amount Prepaid	$0.00
		Sub-Total	**$134.95**

Cashier

Special Order

Taxable	Non-Tax	Discount	Totals
$0.00	$0.00	$0.00	$0.00
		Shipping/Handling	$0.00
		Tax	$0.00
		SubTotal	$0.00
		% Collect Amount	$0.00
		Sub-Total	**$0.00**

Payments

Salesperson ls   ightspeed NXT User
Cashier ?????   peed NXT User

Method of Paymen   Manual Card

Amt Tendered

Payment Notes

Total $134.95

Method   Amount
                          $0.00

The dealer should check to see that the order is complete, or...

that any special order product quantities are listed correctly in the Special Order column

Iceberg Powersports (Working)

The shipping amount originally displayed on the dealer's Lightspeed invoice is the amount the customer is expecting to pay based on what they saw upon check-out. If the dealer changes that amount, the Lightspeed shipping cost is updated, but it is the dealer's responsibility to let the customer know about the change. The change will show up in the 50 Below Online store, but the system does not automatically notify the customer. The dealer should send an email or make a phone call.

3. Cashier the invoice using the method of payment as specified in the Web Order.

Security Caution: Dealers should carefully control Lightspeed access! Customer credit card information will be displayed to all authorized users (the dealer's employees) to whom access is given for the Web Order invoicing function.

If the dealer has the Lightspeed credit card interface installed, they can choose a credit card method of payment.

Web Orders[3]   BMW ETK   EPC

Cashier

Order			
Taxable	Non-Tax	Discount	Totals
$0.00	$0.00	$0.00	$0.00
		Shipping/Handling	$0.00
		Tax	$0.00
		SubTotal	$0.00
		% Collect Amount	$0.00
		Sub-Total	$0.00

$0.00
$134.95

Payments

Salesperson ls   T User
Cashier ??????????   d NXT User

Total Amount Due $134.95

Method of Payment
Amt Tendered $0.00   Manual Card
Payment Notes
Charge

Method of Payment	Amount
	$0.00

The Lightspeed/50 Below integration will enable the dealer to see the credit card payment information transferred from the 50 Below Online Store into Lightspeed. Then they can click through the normal Lightspeed steps to cashier the invoice.

File Parts Service Sales System Window Help

New Invoice | Parts | Customer | Special Order | Save/Recall | Web Orders(3) | BMW ETK | EPC

Line Items | **Cashier**

Sold Now

Taxable	Non-Tax	Discount	Totals
$149.95	$0.00	$20.00	$129.95

Shipping/Handling: $5.00
Gift Cards: $0.00
Tax: $0.00

Amount Prepaid: $0.00
Sub-Total: $134.95

Special Order

Taxable
$0.00

Payments

Salesperson: ls — Lightspeed NXT User
Cashier: ???????? — Lightspeed NXT User

Method of Payment: [   ]
Amt Tendered: $0.00 — Manual Card
Payment Notes: [   ]
Change: [   ]
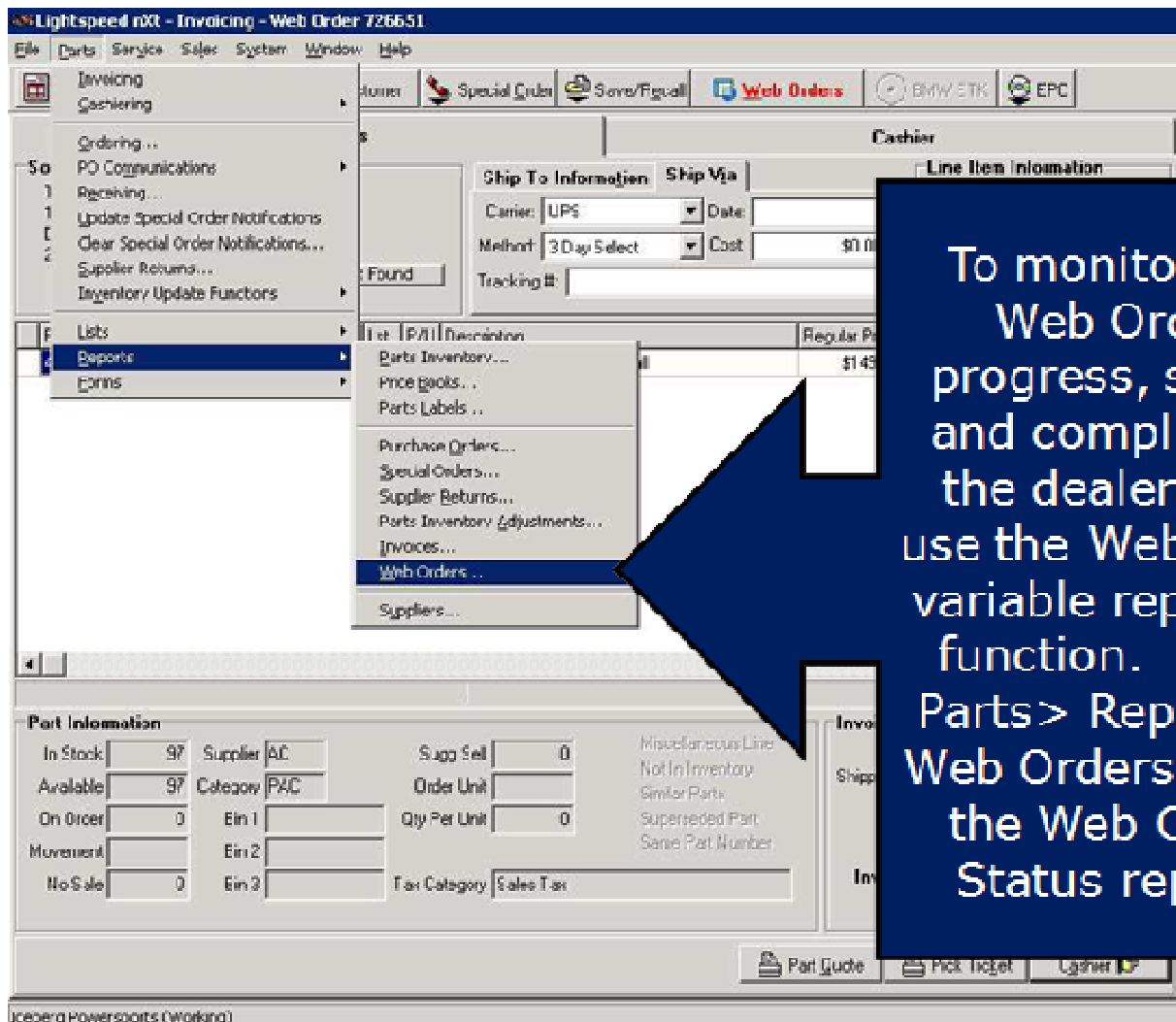
Additional Payment | Remove Payment

Invoice Notes: Web Order

Back | Print

Iceberg Powersports (Working)

> If the dealer does not have the Lightspeed credit card interface installed, they will see the "Manual Card" button. The dealer can click that to transfer the card information from 50 Below's system to Lightspeed.

The dealer should remember that neither Lightspeed or the 50 Below Online Store are set up to process orders through PayPal. (Those orders require a login to PayPal itself for processing them.)

To monitor the Web Order progress, status and completion, the dealer may use the Web Order variable reporting function. Open Parts> Reports > Web Orders to run the Web Order Status report.

5. Special Orders

If there are products on the order that the dealer does not have in stock, they can contact the customer to confirm whether a special order is OK and to negotiate additional shipping charges, pricing differences, or longer wait times.

If the customer wants to go ahead with a special order, the dealer should include the special order products on the same invoice they create when they ship the remainder of the Web Order.

They can take full payment up front, or take payment when the special order is shipped. *(They should remember that federal law prohibits taking payment before they ship special order products unless the customer has specifically authorized them to do so.)*