ERP Sync Questionnaire

Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Link to Acumatica: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tenant to Connect to: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Version of Acumatica: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Acumatica User for CIMcloud: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# 1. Purpose

The purpose of this document is to acquire the information needed to configure our ERP Sync tool to support the way that your business operates. The ERP Sync tool is what moves the data back and forth between your ERP system and CIMcloud.

# 2. ERP Sync Tool Settings / Preferences

We need answers to the following questions in order to properly configure the ERP Sync tool. Default answers will be indicated below by a light blue highlight.

The questions below are to collect data for items that are coded directly in the sync process. For overall information on what data is being synced to and from Acumatica: <https://help.cimcloud.com/help-center/acumatica-data-sync-overview/>

# 2A. Standard To Website Data

## Products

1. When a product first syncs over from the ERP what do you want the **status** to be? see <https://help.cimcloud.com/help-center/managing-product-statuses/> for more details
   1. Disabled
   2. Acumatica Attribute: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   3. Enabled
2. How do you want to populate the product **name**? See <https://help.cimcloud.com/help-center/acumatica-product-data-from-erp-to-cimcloud/> for more details on product fields mapped and standard CIMcloud display fields on the product.
   1. Managed in CIMcloud through spreadsheet uploads or direct updates
   2. Acumatica Item Description
   3. Acumatica Attribute. Attribute Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. How do you want to populate the product **description**? See <https://help.cimcloud.com/help-center/acumatica-product-data-from-erp-to-cimcloud/> for more details on product fields mapped and standard CIMcloud display fields on the product.
   1. Managed in CIMcloud through spreadsheet uploads or direct updates
   2. Acumatica Item Header Description
   3. Acumatica Description Tab
   4. Acumatica Attribute. Attribute Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. How do you want to populate the three main image names to link to products? See <https://help.cimcloud.com/help-center/image-management-guidelines/> for more information on Images
   1. Managed in CIMcloud through spreadsheet uploads or direct updates
   2. Mapped from Acumatica Attributes:
      1. Thumbnail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      2. Normal image: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      3. Large Image: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Taxes

For more information on how CIMcloud handles taxes: <https://help.cimcloud.com/help-center/cimcloud-and-taxes-the-basics/>

1. Will you be using a tax service like Avalara? Yes/No
   1. If yes, tax service: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Do you use tax exemptions in Acumatica and will you have some customers in CIMcloud who are tax exempt and others not? Yes/No.
3. Will users be allowed to add new shipping addresses through CIMcloud? Yes/No

## Pricing

1. Do you use Discounts on Acumatica sales orders **( YES | NO** ) CIMcloud currently only supports line level discounts displaying on the website.

Please provide a brief summary of how you use discounts:

# 2B. To Website Data For Retail Catalog: Public-Facing Product Catalog Bundle or Retail Store: Public-Facing Catalog & Cart Bundle

## Pricing for Anonymous Customers / Users (Retail Catalogs / Stores Only)

This section is only applicable for projects that purchase either the Retail Catalog: Public-Facing Product Catalog or Retail Store: Public-Facing Catalog & Cart add-on bundles. For more information on Acumatica customer to CIMcloud Account syncing check out: <https://help.cimcloud.com/help-center/acumatica-account-data-from-erp-customers-to-cimcloud/>

* What pricing should be used / shown to anonymous (a.k.a. “B2C”) customers?
  + Standard Price (from Item Maintenance or Base Price Set-up)
  + A Specific Customer Price Level: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (enter price level here)
  + Note: The default is “Standard Price”

# 2C. To Website Data for Advanced Platform & Product List Features Bundle

This section only applies if you purchased the Advanced Platform & Product List Features add-on bundle

1. Do you use account level product cross references and want CIMcloud users to see these aliases displayed when logged in for the particular account on the site front? **( YES | NO )**

# 2F. Multiple ERP Company Files/Tenants Bundle

1. Do you want to sync multiple tenants to CIMcloud?

**( YES | NO )**

2. If yes, what tenants do you want to sync?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# 3. Standard From Website Data

## Sales Order Import Settings (When Importing Into The ERP System From CIMcloud)

For more information on the CIMcloud process for creating orders: <https://help.cimcloud.com/help-center/acumatica-sales-orders-created-in-acumatica-from-cimcloud/>

1. Should we use a specific AR customer when placing test orders? **( YES | NO )**
   1. if so, which customer should we use (customer name and customer #)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. Note: if not specified, CIMcloud will create a customer with number 00-WSP100
2. Please specify the default settings for all new orders being created:
   1. Order Type to use for importing web order. See article noted above for more information. The recommendation is to have a designated order type for web orders that allows the order number to be set manually to match the order number generated on the website and given to the customer. Order type: \_\_\_\_\_\_\_\_\_\_\_\_
   2. Sales order number prefix: \_\_\_\_\_\_\_\_\_\_\_\_
      1. The default is “W”
      2. You can specify a different prefix if “W” is already being used.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. What is the default Cash Account to set on imported orders: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. What is the default warehouse to be set on the order?
   1. Default warehouse code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. Update Customer records in the ERP when orders import? Yes/No
6. Create new Shipping Addresses in the ERP when orders import? Yes/No

## Customer Creation(Only Required If Customers being Created in the ERP by Cimcloud)

1. What are the default values for creating a new AR customer during B2C checkout:
   1. Terms code: \_\_\_\_\_\_\_\_\_\_\_\_\_ (if not defined, we will look for a terms code in the ERP labeled as Credit Card or COD)
   2. Price level: \_\_\_\_\_\_\_\_\_\_\_\_\_ (this will be set to match the option chosen above)
   3. Salesperson number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ (if not defined, we will look for a salesperson named “House” or similar to the company name)
2. Do you allow guest checkout? **( YES | NO )**
   1. Should orders import into a single customer inside of Acumatica? **( YES | NO )**
      1. If “yes”, customer number to use: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      2. The default is “No”

## Credit Card Processing for Orders

1. Do you plan to accept credit cards on the site? **( YES | NO )**
   1. If yes, What gateway do you plan to use (Fortis(Acumatica payments), Authorize.net, PAYA, Ebiz (CBS), Repay (APS), PayFabric (Nodis)): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. If yes, which credit cards do you accept and what is the payment type to use for this card. The payment type may be the same for each card or may be different.
      1. Master Card **( YES | NO )** Payment Method ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      2. Visa **( YES | NO )** Payment Method ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      3. American Express **( YES | NO )** Payment Method ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      4. Discover **( YES | NO )** Payment Method ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   3. What transaction type should be used when processing the card? **Payment (pre-authorization)** or **Deposit / Sale**
      1. Default is “Payment (pre-authorization)”
      2. Note: This is the Auth-Only vs. Auth-Capture

## Pay Invoices Online

For detailed information on cash receipt creation in Acumatica from CIMcloud invoice payments: <coming soon>

1. Do you plan on allowing users to pay invoices online by credit card or ACH? **( YES | NO )**
   1. If yes, Default cash receipt deposit bank code (required): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Do you plan to accept credit cards for invoice payments? **( YES | NO )**
   1. If yes, What gateway do you plan to use (Fortis(Acumatica payments), Authorize.net, PAYA, Ebiz (CBS), Repay (APS), PayFabric (Nodis)): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. If yes, which credit cards do you accept and what is the payment method ID to use for this card. The payment type may be the same for each card or may be different
      1. Master Card **( YES | NO )** Payment Method ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      2. Visa **( YES | NO )** Payment Method ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      3. American Express **( YES | NO )** Payment Method ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      4. Discover **( YES | NO )** Payment Method ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# 3A. Merchandising Tools Bundle

This question only applies if you purchased the Merchandising Tools add-on bundle

1. Do you plan to use coupons on the site? **( YES | NO )**
   1. If yes, the miscellaneous item code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_
      1. The default miscellaneous item: /COUPON

# 3B. Advanced Merchandising Tools Bundle

This question only applies if you purchased the Advanced Merchandising Tools add-on bundle

1. Do you plan to use gift cards on the site? **( YES | NO )**
   1. If yes, the miscellaneous item code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_
      1. The default miscellaneous item: /GIFT

# 3C. Advanced B2B Portal Bundle

1. Will you be using the account approval process that syncs accounts directly to Acumatica outside of orders? **( YES | NO )**
   1. If yes, what are the defaults for the following
      1. Terms code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      2. Price level: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (default: blank)
      3. Sales person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      4. Tax schedule: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (default: NONTAX)