ERP Sync Questionnaire

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

# 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 Sage100: <https://help.cimcloud.com/help-center/standard-data-synced-between-cimcloud-and-sage-100/>

# 2A. Standard To Website Data

## Products

1. When a product first syncs over from Sage what do you want the **status** to be? see <https://help.cimcloud.com/help-center/managing-product-statuses/> for more details
   1. Disabled
   2. Sage UDF. UDF Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   3. Enabled
2. How do you want to populate the product **name**? See <https://help.cimcloud.com/help-center/erp-product-sync-to-cimcloud-platform-from-sage100/> 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. Sage Short Description
   3. Sales Long Description
   4. Sage UDF. UDF Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. How do you want to populate the product **description**? See <https://help.cimcloud.com/help-center/erp-product-sync-to-cimcloud-platform-from-sage100/> 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. Sage Short Description
   3. Sales Long Description
   4. Sage UDF. UDF 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 Sage UDFs:
      1. Thumbnail UDF: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      2. Normal image UDF: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      3. Large Image UDF: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## 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 Sage and will you have some customers in CIMcloud who are tax exempt and others not? Yes/No. (If yes, CIMCloud will sync the customer and shipping address exemption per tax code to the website.)
3. Will users be allowed to add new shipping addresses through CIMcloud? Yes/No

## Pricing

1. Do you use Product Line Pricing in Sage **( YES | NO )**

# 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 Sage customer to CIMcloud Account syncing check out: <https://help.cimcloud.com/help-center/erp-customer-account-sync-cimcloud-platform-to-from-sage100/>

* What pricing should be used / shown to anonymous (a.k.a. “B2C”) customers?
  + Standard Price (from Item Maintenance)
  + The Blank Customer Price Level
  + 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 aliases in Sage100 and want CIMcloud users to see these aliases displayed when logged in for the particular account on the site front? **( YES | NO )**

# 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/erp-sales-order-creation-in-sage-100-from-cimcloud-platform/>

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. Status code:  **New | Hold | Open**
      1. The default is “New”
      2. If “Hold”, what reason code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. Sales order number prefix: \_\_\_\_\_\_\_\_\_\_\_\_
      1. The default is “W”
      2. The order number created in Sage 100 is the same order number as the one generated on the CIMcloud platform, prefixed with “W” to avoid conflicts in Sage 100 that might have the same numbers.
      3. You can specify a different prefix if “W” is already being used.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   3. Should the print order checkbox be checked on new orders? **( YES | NO )**
      1. The default is “Yes”
   4. Should the print picklist checkbox be checked on new orders? **( YES | NO )**
      1. The default is “Yes”
3. What is the default warehouse to be set on the order?
   1. Default warehouse code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. Update Customer records in Sage when orders import? Yes/No
5. Create new Shipping Addresses in Sage when orders import? Yes/No (see <https://help.cimcloud.com/help-center/erp-shipping-address-sync-cimcloud-platform-to-from-sage100/> )

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

1. What are the default values for creating a new AR customer during B2C checkout:
   1. Division code: \_\_\_\_\_\_\_\_\_\_\_\_ (if not used, “00” is the default)
   2. Terms code: \_\_\_\_\_\_\_\_\_\_\_\_\_ (if not defined, we will look for a terms code in the ERP labeled as Credit Card or COD)
   3. Price level: \_\_\_\_\_\_\_\_\_\_\_\_\_ (this will be set to match the option chosen above)
   4. 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 Sage? **( 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, 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. This is set up in Sage under Payment Type Maintenance?
      1. Master Card **( YES | NO )** Payment Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      2. Visa **( YES | NO )** Payment Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      3. American Express **( YES | NO )** Payment Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      4. Discover **( YES | NO )** Payment Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. 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
   3. What AR terms code should be used for credit card or prepaid transactions? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      1. Note: if not specified, we will look for a terms code labeled as “Credit Card” or “COD” or “No Terms”.
   4. Who is the Payment Processor / Gateway?
      1. REPAY (formerly APS)
         1. Username: \_\_\_\_\_\_\_\_\_\_\_\_\_
         2. Password: **please call your Customer Success Manager with the password**
      2. PAYA Exchange
         1. M\_ID: \_\_\_\_\_\_\_\_\_\_\_\_\_
         2. M\_KEY: \_\_\_\_\_\_\_\_\_\_\_\_\_
      3. Century Business Solutions / eBiz
         1. User ID: \_\_\_\_\_\_\_\_\_\_\_\_\_
         2. Security ID: \_\_\_\_\_\_\_\_\_\_\_\_\_
         3. Password: **please call your Customer Success Manager with the password**

## Pay Invoices Online

For detailed information on cash receipt creation in Sage100 from CIMcloud invoice payments: <https://help.cimcloud.com/help-center/erp-invoice-payment-creation-in-sage-100-from-cimcloud-platform/>

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): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      1. In Sage 100, it is one character. Bank codes can be viewed in the “Bank Code Maintenance” interface.
2. Do you plan to accept credit cards for invoice payments? **( YES | NO )**
   1. 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. This is set up in Sage under Payment Type Maintenance?
      1. Master Card **( YES | NO )** Payment Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      2. Visa **( YES | NO )** Payment Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      3. American Express **( YES | NO )** Payment Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      4. Discover **( YES | NO )** Payment Type: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# 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 Sage outside of orders? **( YES | NO )**
   1. If yes, what are the defaults for the following
      1. Division code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (if not used, “00” is the default)
      2. Terms code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      3. Price level: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (default: blank)
      4. Sales person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
      5. Tax schedule: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (default: NONTAX)

# 3C. DM2 | Sage 100

1. Do you utilize DM2 (Oil and Gas Industry) functionality on your Sage 100 install?

**( YES | NO )**