iWeb Development

User manual

Exact Online Wholesale
WooCommerce

Introduction

Thank you for choosing the Exact Online connector from iWebDevelopment. In this user manual the various parts of the connector are explained as well as a brief overview of the synchronization with Exact Online. Do not hesitate to contact iWebDevelopment in case of questions!

The following chapters have been included in this document:

1. Accounts
2. Items
3. Sales orders
4. Stock

Requirements

For correct functioning of the synchronization it is important that your online shop meets the following requirements:

- WooCommerce 2.1 or above

- Functioning WooCommerce API

- Standard WooCommerce configuration

- Permalinks enabled

- No price or discount affecting extensions

- Only default WooCommerce order states

1. Accounts / Customers

When an order is placed in the WooCommerce shop, the customer will be synchronized as an account in the Exact Online CRM system. The data from the order created by WooCommerce will be synchronized. The following table shows which account data will be imported from WooCommerce into Exact Online:

WooCommerce - Customer	Exact Online - Account- information
Company name	Name
First name - Last name	Name (if company name is empty)
Address 1	Address 1
Address 2	Address 2
Postal code	Postal code
City	City
Country	Country
Phone number	Phone
E-mail	E-mail

WooCommerce - Customer	Exact Online - Contact- information
First name	First name
Last name	Last name
Phone number	Phone
E-mail	E-mail

Whenever the shipping address of the account deviates from the billing address the connector will create a separate account in the CRM of Exact Online, since the API of Exact Online currently has no support for adding multiple addresses to a single account.

2. Items

2.1. General item synchronisation

When a product is created in WooCommerce, an item will also be created in Exact Online which is connected to the WooCommerce product. When the item is created in Exact Online or edited in WooCommerce, the following information will be synchronized from WooCommerce:

WooCommerce - Product	Exact Online - Item
SKU / Product ID	Item code* (maximum of 30 characters)
	Item group**
Name	Description
Description	Extra description
Sales price (including VAT)	Sales price

* The item code is determined by various fields:

- If the SKU field is filled in and not longer than 30 characters, this will be used as the item code.

- If the SKU field is empty or longer than 30 characters, the Product ID will be used as item code.

It is important to know that the item code field will only be filled in during the creation of a product and not for further item adjustments.

** The item group as configured during the installation will be used.

2.2. First synchronization after installation

In relation to various limitations we can synchronize a maximum of 35 items per 5 minutes to your Exact Online account. To synchronize a larger catalogue it will take a little longer.

In addition to the items from your catalogue, 2 additional items will be created in Exact Online:

- payment

- shipment

This items will be used to register payment- and/or shipping costs when creating a sales order in Exact Online.

3. Sales orders

When an order is placed in WooCommerce and it has the correct status*, the content of the order will be synchronized as a sales order to Exact Online. The following data from the headers will be synchronized as a sales order:

WooCommerce - Order	Exact Online - Sales order
Order for - customer	Account from section 1
Order date	Order date
Order number	Your reference
Order number	Description
Order number	Payment reference
	Payment condition**

* This status can be configured during the installation and one of the following statuses can be chosen: "pending", "processing" or "completed".

** This is the payment condition which has been configured during the installation of the connector.

The data of the sales order (the lines) will synchronized based on the following information from the WooCommerce order:

WooCommerce - Order	Exact Online - Sales order lines
Product	Item*
Description	Description
Amount	Quantity
Total price	Total price (including VAT)
	VAT-code**

* This is a reference to an item which has been created as seen in section 2

Two separate lines are used in the sales order for the shipping and/ or payment costs. You can read more about this in section 2.2 of this user manual.

** VAT-code

If the customer is from the EU, the VAT-code will be used based on the VAT rate from WooCommerce, and use the VAT-code as configured during the installation.

If the customer does not reside in the EU, the export VAT-code will be used as configured during the installation.

4. Stock

The stock level from Exact Online will be synchronized to WooCommerce using the following formula:

Actual stock - planned outbound stock

The synchronization will be scheduled for every 5 to 10 minutes. The stock levels for items with a change in stock (For example a stock count, sales order or purchase order) will be synchronized in WooCommerce.

Important

- Make sure you have created a new financial year before the start of a new year. This will make sure the connector can keep functioning properly.
- In case you change the domain or when there is a change to for example HTTPS you need to make sure you have indicated this to us.
- The item group configured during the installation should include a general ledger account for costs, stock and revenue.
- Please let us know any adjustments in the SKU-field of items by sending a mail to our support at info@iwebdevelopment.com. This way we can manually re-synchronize these items to prevent errors from occurring.
- Items or accounts should not be deleted, deduplicated or recreated in Exact Online to ensure correct functioning of the connector.
- Exact Online will be leading regarding the stock synchronization, therefore the stock positions in WooCommerce will be overwritten by the stock positions present in Exact Online.