



MYOB Advanced E-Commerce Integration

MYOB Advanced
E-COMMERCE INTEGRATION



Our system is ideal for businesses who receive 30 or more orders per day through the means of phone, email, fax, or online.

One core feature of our system is the ability to send orders automatically from your website to your ERP system. This means, orders are no longer manually entered. Eliminating double handling of data, will result in administration saving. To show you how, we have outlined a scenario below, based on an existing client:

250 DAYS

A) In the year 2019, we have **250 business days** available.



B) Company A pays their admin team \$30 per hour. Allocating other expenses to this employee, means their actual cost is **\$39 per hour**.

\$39 P/H

X4 HOURS

C) Company A's admin team spends **4 hours per day** manually entering in orders, into the system.

D) Over the course of a year, Company A's admin team spends **1,000 hours** on entering orders.

= 1000

1000 HOURS X \$39

E) Multiplying 1,000 by \$39, means Company A will save **\$39,000** per year in admin costs.

= \$39,000 PER YEAR SAVED!!



We have an E-commerce platform, capable of handling both B2B and B2C customers. The E-commerce platform connects to MYOB Advanced to reduce the double handling of data and keep both systems in sync.



“I make my site work for me, with all the control I need!”

MYOB Advanced Integration Benefits.

Based on past customers experience, the reduction in admin time and cost has resulted in admin being able to perform other tasks like social media and blog marketing.

1. Remove the double handling of order data.
2. Reduce admin costs by automating the B2B ordering process.
3. Reduce human error with no manual entry of data by admin staff.
4. Customers can now order 24/7. This will also reduce the time spent by the sales team filling in order sheets.
5. Ability to create exclusive customer pricing online, and special prices and promotions with ease.
6. Product categories are in sync between MYOB Advanced and the website.
7. Keep product information up-to-date on both MYOB Advanced and the website.
8. Stock information is live, available online for customers.
9. Customer data is kept up-to-date and in sync between both MYOB Advanced and the website.
10. Customers can gain access to invoice information, order information, and even pay their invoice statement online.



Steps Involved.



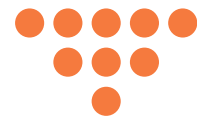
- 1.** We will run an initial consultation with the customer to understand their requirements.

- 2.** We will create a proposal including any customisation works required.



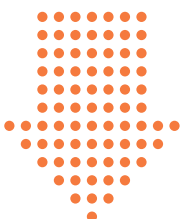
- 3.** Upon acceptance of the proposal, we will set up a new instance of the shop integration module.

- 4.** We will develop any customisations requested.



- 5.** On completion of customisations, we will run a number of test scenarios.

- 6.** After several successful test scenarios, we will launch the integration with the client.



- 7.** The launch phase will be released to a select few customers to help the clients' staff get familiar with the process.

Developed Integration Modules.

SALES CATEGORIES

What

Sales Categories are located under attributes on MYOB Advanced. Stock items are grouped under sales categories. On WooCommerce, the term is product categories and products are grouped under product categories.

Features

- ✔ Sales Categories are updated on a nightly basis, adding and removing categories to match both systems.
- ✔ Parent-child structure is kept between both systems.

Connected Fields

MYOB Advanced	WooCommerce
Sales Category Name	Product Category Name
Sales Category Parent	Product Category Parent

PRODUCTS - SIMPLE

What

A simple product is a stock standard product with no variations and is not a bundle of products. On MYOB Advanced, the majority of the data is taken from the stock items database table. On request, we can also retrieve data from custom fields and other available fields on MYOB Advanced.

Features

- ✔ Keep stock up-to-date on both MYOB Advanced and WooCommerce.
- ✔ Keep product pricing up-to-date on MYOB Advanced and WooCommerce.
- ✔ Share additional product data on WooCommerce using attributes.
- ✔ Control images on MYOB Advanced.

- ✓ Contain data sheets, brochures, and product files on MYOB Advanced.

Connected Fields

MYOB Advanced	WooCommerce
Description	Title
Description Expanded	Description
Images	Images
Regular Price	Regular Price
Stock Available	Stock Available
Attributes	Attributes
Files	Files (Custom system)

PRODUCTS - VARIATIONS

What

A variable product is a product with a number of variations. For example, a T-shirt can vary in size and in colour, a mug can just vary in size. Using non-stock items, stock items, and the attributes of each stock item, we can create a series of products with variations on WooCommerce.

The parent product will be a non-stock item and the stock items will be the variations. Each variation will list the attributes and values to make up the variation. On the order form, it will contain the variation product, creating no issues around ordering.

PRODUCTS – BUNDLES / KITS

The term on MYOB Advanced is kits and the term in WooCommerce is bundles. WooCommerce has a plugin for product bundles. We can connect MYOB Advanced product kits to WooCommerce product bundles. Within WooCommerce, we can connect a series of simple products and variable products. To use Product Kits with variations, we must have additional checkboxes on MYOB Advanced.

CUSTOMERS

What

Customers are also known as users on WooCommerce. On MYOB Advanced, a customer is made up of standard information and extended by their main contact. The main contact information is used to create the billing and shipping information on WooCommerce.

The integration between the two system works both ways. If a customer updates their information within their account, it will also update MYOB Advanced. If a staff member updates MYOB Advanced with new information, this will also update WooCommerce.

We have the capabilities of creating custom fields and using the custom fields in different scenarios. For example, we can create a field for customer credit limit, and limit credit to the amount specified for the customer.

Features

- ✔ Connect customers and contacts from MYOB Advanced into customers on WooCommerce.
- ✔ Sync both billing and shipping information or just use the main contact.
- ✔ If a customer is updated on MYOB Advanced, the information on WooCommerce is also updated.
- ✔ If a customer is updated on WooCommerce, the information on MYOB Advanced is also updated.
- ✔ Ability to sync multiple contacts as customers in WooCommerce to have multiple contacts sync to one MYOB Advanced account.
- ✔ We can create custom customer fields if required.

Connected Fields

MYOB Advanced	WooCommerce
Address 1	Billing Address 1
Address 2	Billing Address 2
Suburb	Billing Suburb
City	Billing City
Country	Billing Country
Postcode	Billing Postcode
Phone	Billing Phone
Mobile	Billing Mobile
Email Address	Email Address
Full Name	Full Name
Company	Company
Shipping Address 1	Shipping Address 1
Shipping Address 2	Shipping Address 2
Shipping Suburb	Shipping Suburb
Shipping City	Shipping City
Shipping Country	Shipping Country
Shipping Postcode	Shipping Postcode

SALES ORDERS

What

Automatically send sales orders from WooCommerce to MYOB Advanced, reducing the cost and time of double handling transactions. Sales Orders updated on MYOB Advanced will be sent across to update the sale order on WooCommerce. Updated sales orders on WooCommerce (mainly used for order status) will be updated on MYOB Advanced. Customers can view a history of all their sales orders, including orders not made on the website.

Features

- ✓ Automatically send sales orders from WooCommerce to MYOB Advanced.
- ✓ When orders are updated on MYOB Advanced i.e. Status, the update is reflected on WooCommerce.
- ✓ Display a history of sales orders on WooCommerce under their account.
- ✓ Include a customer purchase order number as part of the sales order.

Connected Fields

MYOB Advanced	WooCommerce
Order Number	Order Number
Order Date	Order Date
Order Amount	Order Amount
Branch	(Set by customer metadata or default name)
Warehouse Location	(Set by customer metadata or default name)
Order Items Inventory ID	Order Items Product ID
Order Items Amount	Order Items Amount
Order Items Quantity	Order Items Quantity
Order Items Total	Order Items Total
Main Contact Billing Contact	Billing Details
Main Contact Shipping Contact	Shipping Details

CUSTOMER PRICING – SALES PRICES

What

Our integration will connect prices to specific customer roles, the prices will only be shown once the user logs into their account. This means you can have a regular retail price and trade prices specific to certain customers.

Features

- ✓ Set custom roles for users.
- ✓ Have prices based on both product and role.
- ✓ Prices are only shown when the user signs into the website.

Connected Fields

MYOB Advanced	WooCommerce
Customer Price Class	Role
Inventory ID	Product ID
Price	Price

CUSTOMER PRICING – DISCOUNT CODES

What

Within MYOB Advanced, you can set up discount prices based on the product class and the customer class. The discounts are percentage-based. In terms of integration, we take the discount percent and reduce it from the original price, setting the price against both the user role and the product price group.

Features

- ✓ Set custom roles for users.
- ✓ Have prices based on product class and customer price class.
- ✓ Prices are based on reducing the original price by a set discount.

Connected Fields

MYOB Advanced	WooCommerce
Customer Price Class	Role
Product Price Class	Product Price Group
Price	Price

SALES INVOICES

What

Help manage accounts receivables with this very powerful module. Your customers can now log in to their account and view their current invoice statement, along with viewing past invoices.

Features

- ✓ View invoice history.
- ✓ Pay invoice statement balance or a custom balance.
- ✓ Download individual invoices.
- ✓ Receive invoice overdue reminders.
- ✓ Suspend customer account, with the ability to settle invoices.

Connected Fields

MYOB Advanced	WooCommerce
Invoice Number	Invoice Number
Invoice Date	Invoice Date
Invoice Amount	Invoice Amount
Invoice Balance	Invoice Balance
Invoice Items Inventory ID	Invoice Items Product ID
Invoice Items Amount	Invoice Items Amount
Invoice Items Quantity	Invoice Items Quantity
Invoice Items Total	Invoice Items Total

OPPORTUNITIES / QUOTES

What

Opportunities on MYOB Advanced become customer quotes on WooCommerce. The customer can view all their quotes on the My Account tab, including a history of past quotes. The customer can choose to accept a quote (will update opportunity as Won) or deny a quote (update opportunity as Lost). If the customer accepts a quote, the quote items will be sent to the shopping cart, so the user can check out and turn the quote into an order.

Features

- ✔ Customers can accept or deny an opportunity within WooCommerce.
- ✔ Accepting a quote will turn into a sales order.
- ✔ Sync Quote/Opportunity data between MYOB Advanced and WooCommerce.

Connected Fields

MYOB Advanced	WooCommerce
Opportunity Number	Opportunity Number
Opportunity Date	Opportunity Date
Opportunity Expiry Date	Opportunity Expiry Date
Opportunity Amount	Opportunity Amount
Opportunity Balance	Opportunity Balance
Opportunity Items Inventory ID	Opportunity Items Inventory ID
Opportunity Items Amount	Opportunity Items Amount
Opportunity Items Quantity	Opportunity Items Quantity
Opportunity Items Total	Opportunity Items Total

TAX

What

Tax name and percentage are shared between MYOB Advanced and WooCommerce. Tax rates can now be controlled by MYOB Advanced.

Features

- ✓ Set tax data on MYOB Advanced and send information to WooCommerce.
- ✓ Adjust tax rates on MYOB Advanced and this will update WooCommerce, i.e. 12.5% to 15%.

Connected Fields

MYOB Advanced	WooCommerce
Tax Name	Tax Name
Tax Rate	Tax Rate

*Note: Tax values are already sent with Sales Orders. This module is designed to control the types of taxes on WooCommerce.

SHIPPING METHODS

What

Control shipping methods on MYOB Advanced and transfer the information into WooCommerce. This will include the name of the shipping method and calculations used to determine the cost of shipping.

Features

- ✓ Shipping methods can be controlled on MYOB Advanced.
- ✓ Shipping methods on MYOB Advanced can be connected to a shipping type on WooCommerce.
- ✓ Shipping methods are connected to Sales Orders.
- ✓ Shipping methods are restricted by regions.

Connected Fields

MYOB Advanced	WooCommerce
Shipping Name	Shipping Name
Shipping Method (Custom Field)	Shipping Method
Regions	Regions
Shipping Cost	Shipping Cost

***Note: Shipping totals are currently sent with sales orders in the current edition.**

DISCOUNTS / COUPONS

What

Create new promotions and discounts on MYOB Advanced and sync the data across to WooCommerce. Have the discount data come back from sales orders.

Features

- ✓ Create a discount on MYOB Advanced and bring this to WooCommerce.
- ✓ Create an expiration date.
- ✓ Choose whether the coupon is an amount or a discount.
- ✓ Set the total % or rate of the coupon.

Connected Fields

MYOB Advanced	WooCommerce
Discount Name	Coupon Name
Discount Type	Coupon Type
Discount Rate/Amount	Coupon Rate/Amount
Discount Expiration Date	Coupon Expiration Date

SUPPORT TICKETS / CASES

What

Manage all website support tickets from within MYOB Advanced. Your support team will have the ability to receive new tickets and answer new tickets from within MYOB Advanced.

Features

- ✓ Manage existing support tickets using one system: MYOB Advanced.
- ✓ Ability to answer tickets on MYOB Advanced.
- ✓ Emails are sent from the website when a ticket has been updated.

Thank you.

We look forward to
working with you soon.



MYOB Advanced

E-COMMERCE INTEGRATION



Let's chat!
Give us a call today.

Phone

1300 499 000

Web

stratusgroup.com.au