

myob

MYOB Advanced Native eCommerce Connector Technical Whitepaper

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Contents

Introduction	5
Commerce Connector Solution Overview	5
Entities screen (BC202000)	6
Prepare Data screen (BC501000).....	7
Process Data screen (BC501500)	8
Sync History screen (BC301000).....	8
Understanding key difference between Shopify and BigCommerce:	9
Comparison:	9
Shopify:.....	9
BigCommerce:	10
Commerce Edition Synchronized Entities of each eCommerce Platform:	10
Synchronization of Entities - BigCommerce	11
Synchronization of Entities – Shopify	11
eCommerce Features Supported – Out of the box.....	12
Establish Connection Between MYOB Advanced and Shopify.....	13
Create a Shopify Store	14
Initial configuration for the Shopify store	20
Capture store connection information	22
Establish a connection between MYOB Advanced and the Shopify store	30
Establish Connection between MYOB Advanced and BigCommerce	31
Create a BigCommerce store and complete store configuration (optional if you have already had a store).....	31
Configure myob advanced erp for integration	34
Capture store connection information	38
Establish connection between MYOB Advanced and BigCommerce.....	40
Standard field mappings	41
The first synchronisation	42
Automated synchronisation and Real-Time sync	45
Synchronising Customers and Customer Locations	47
Synchronising Customers	47
Synchronising Customer Locations	49
Utilising formulas in Field Mappings for Customers.....	49
Sync direction, Mapping, Filtering and Primary system.....	50
Synchronising Inventory and Product Images.....	50
Synchronising Sales Category – Prerequisite for synchronizing Products for BigCommerce ..	50

Synchronising Inventory	52
Synchronising Product Images	56
Inventory Settings.....	57
Synchronising product availability.....	58
Synchronising Sales Orders	60
Order Settings	60
For Shopify Stores:.....	61
For BigCommerce Stores:	64
Payment Settings.....	68
Shipping Settings (Shopify Stores only)	68
Sales Order Processing – Shopify	69
Raising a Sales Order:	69
Syncing the Sales Order:	72
Fulfilling the Sales Order:.....	74
Preparing Invoice in MYOB Advanced:.....	74
Processing Customer Refund (for unfulfilled orders).....	75
Processing Customer Refund (for fulfilled orders).....	78
Discount.....	81
Sales Order Processing – BigCommerce.....	84
Raising a Sales Order:	84
Syncing the Sales Order:	86
Fulfilling the Sales Order:.....	87
Preparing Invoice in MYOB Advanced:.....	88
Processing Customer Refund (for unfulfilled orders).....	88
Processing Customer Refund (for fulfilled orders).....	91
Discounts.....	94
Gift Wrapping and Gift Message	96
Gift Certificate/Gift Card.....	99
Configure Gift Certificate in MYOB Advanced	100
Enable Gift Certificate/Gift Card feature in the stores.....	102
Buying a Gift Certificate/Gift Card	103
Redeeming a Gift Certificate/Gift Card	105
Customer Pricing, Bulk Pricing, and Pricing Limitation (BigCommerce Only)	106
Customer Pricing.....	106
Bulk Pricing.....	107
Pricing Limitation	108
Template items, matrix items and product variants.....	108

Implementation Efforts Estimation 109

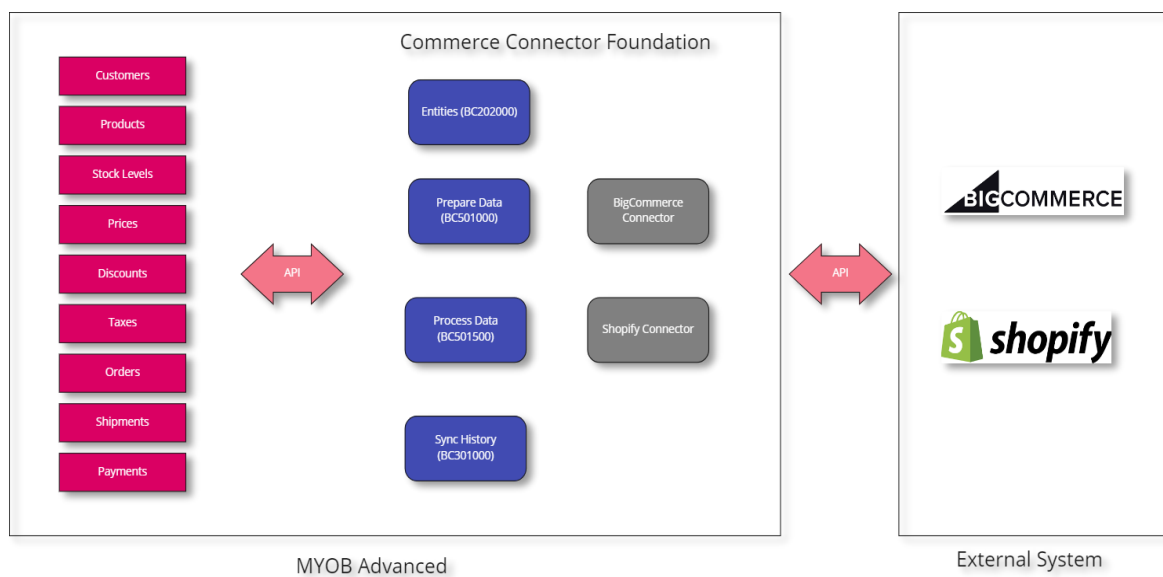
Introduction

MYOB Advanced Native eCommerce Connector provides tools for syncing data between MYOB Advanced ERP and leading eCommerce solutions, BigCommerce and Shopify. Our goal is to provide a Commerce Enabled ERP which will serve B2C and B2B organizations.

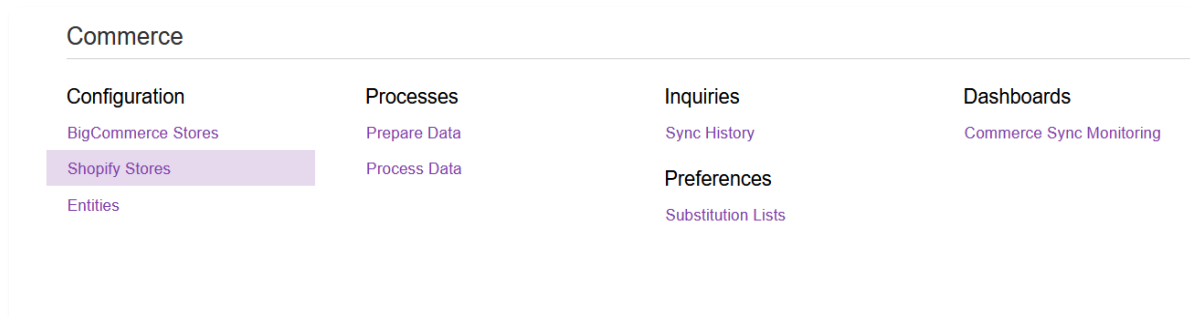
This technical whitepaper aims to provide you with the necessary information about the solution, overview of the eCommerce platforms BigCommerce and Shopify, and the necessary configurations to synchronise ERP and eCommerce data.

Commerce Connector Solution Overview

The diagram below explains the overall architecture of the Commerce Connector.



The Commerce Connector is a part of MYOB Advanced, and can be found in the Commerce workspace:



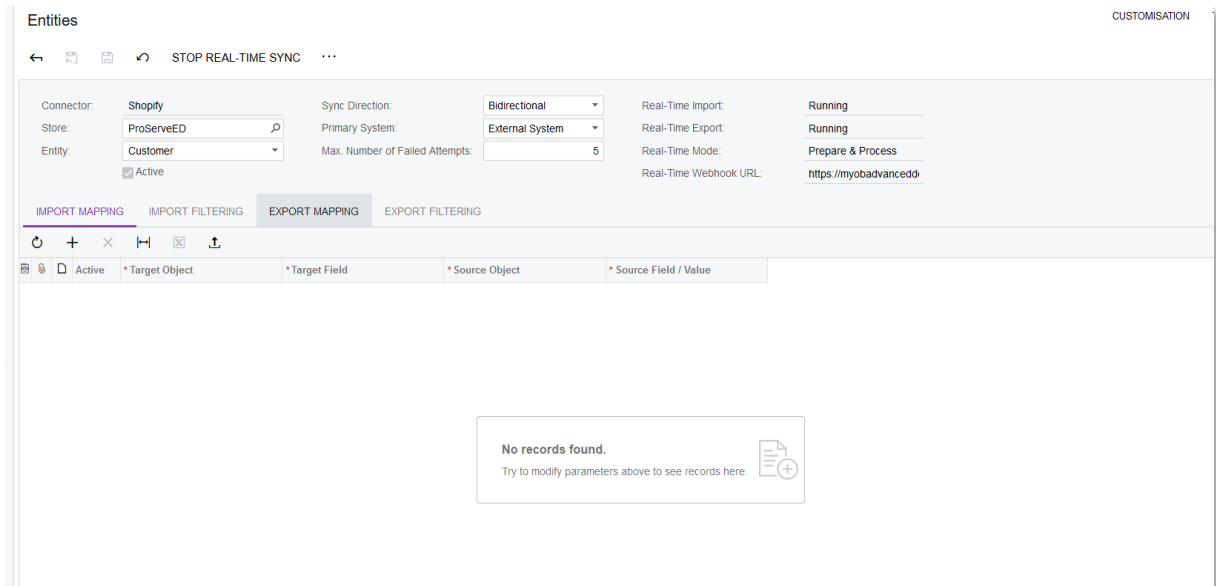
Regardless of what commerce platform the customer is using (whether it is BigCommerce or Shopify), the main functionalities of the Commerce Connector are similar, and are accessible in the following screens:

- Entities – BC202000
- Prepare Data - BC501000
- Process Data - BC501500

- Sync History - BC301000

Entities screen (BC202000)

This screen allows the user to configure Sync Direction (Bidirectional, import or export), Primary System (ERP or External System), and override standard mapping of fields, and add filters when exporting records from MYOB Advanced to external systems and vice versa.



The screenshot shows the 'Entities' configuration screen. At the top, there are navigation icons and a 'STOP REAL-TIME SYNC' button. The main configuration area includes:

- Connector: Shopify
- Store: ProServeED
- Entity: Customer
- Active:
- Sync Direction: Bidirectional
- Primary System: External System
- Max. Number of Failed Attempts: 5
- Real-Time Import: Running
- Real-Time Export: Running
- Real-Time Mode: Prepare & Process
- Real-Time Webhook URL: https://myobadvancedd

Below the configuration area are four tabs: IMPORT MAPPING, IMPORT FILTERING, EXPORT MAPPING, and EXPORT FILTERING. The EXPORT MAPPING tab is currently selected. Below the tabs is a table with columns: Active, Target Object, Target Field, Source Object, and Source Field / Value. The table is currently empty, displaying a message: 'No records found. Try to modify parameters above to see records here.'

Entities: represents an Entity that will be synced when the Commerce Connector is running, example: Stock Items, Non-Stock Items, Customers, Sales Orders, Template Items, Payments, etc.

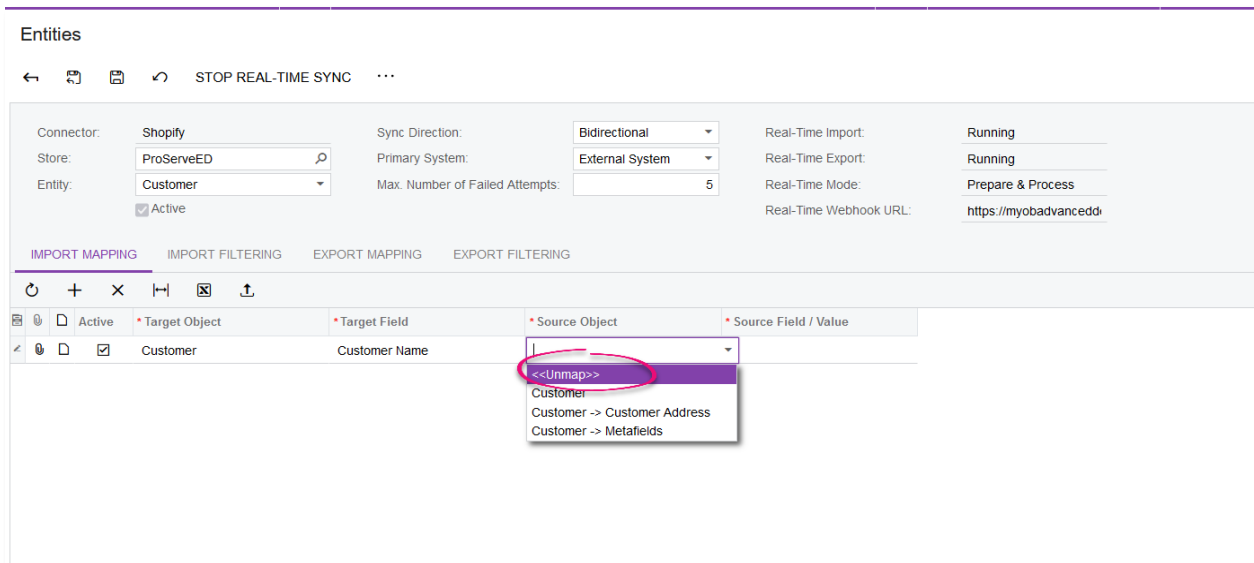
Sync Direction: determines the flow of data for a particular entity when the Commerce Connector is running. Bidirectional means data will be exported from MYOB Advanced to the commerce platform and vice versa. Import means data can only be imported from the commerce platform to MYOB Advanced. Export means data can only be exported from MYOB Advanced to the commerce platform.

Not all Sync Directions are available for all entities. For example, you can have a Bidirectional sync for Customers records, but you can only Export Stock Items from MYOB Advanced to the commerce platform.

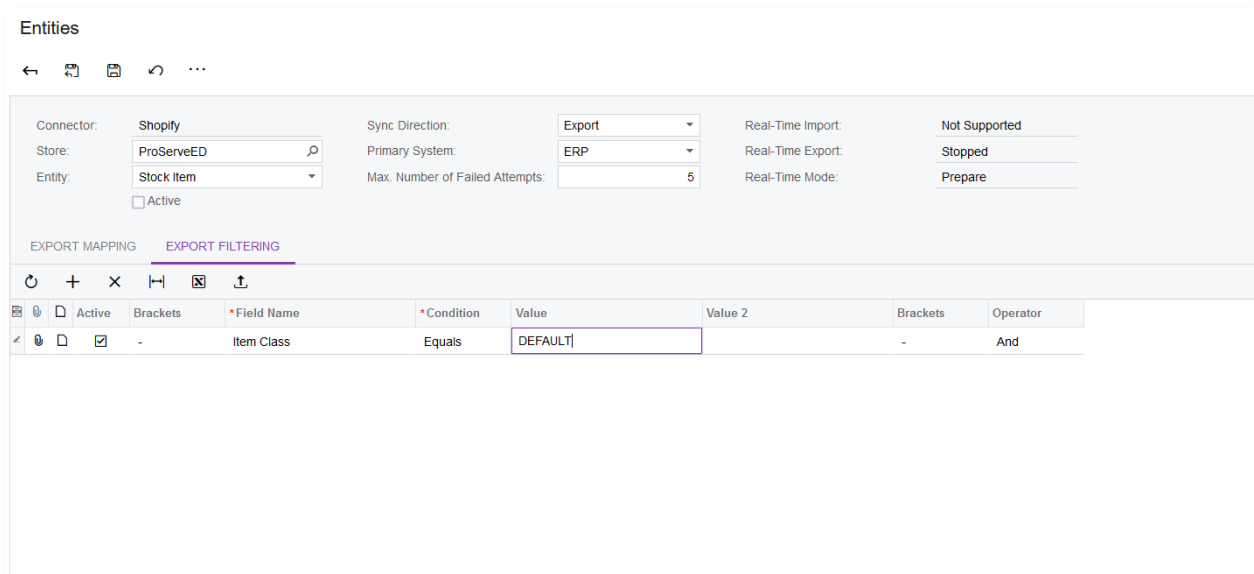
Primary System: Determines from which system the data should be picked by the Commerce Connector in case there's a conflict. For example, if a customer updates their Phone Number on the commerce platform, at the same time an MYOB Advanced user updates the customer phone number in MYOB Advanced. If the Primary System is set to External System, the Commerce Connector will instead uses the value of the commerce platform and overwrite the phone number in MYOB Advanced instead.

Import Mapping/Export Mapping: If there is no Import Mapping or Export Mapping specified, MYOB Advanced and External Systems will sync based on an in-built standard mapping. When you specify an Import Mapping or Export Mapping, the Commerce Connector override the standard mapping with the mapping specified here. The rest of the fields will be synced as per normal

If you want to not import or export a certain field, you can use the “<<Unmap>>” action. This will ensure this field will not be imported or exported when the connector is running.



Import Filtering/Export Filtering: allow the users to configure the filters for importing/exporting records between MYOB Advanced and External Systems. For example, users may only want to export Stock Items where Item Class = DEFAULT. In this case, you will configure an Export Filtering for the Stock Item entity, where Item Class Equals DEFAULT.

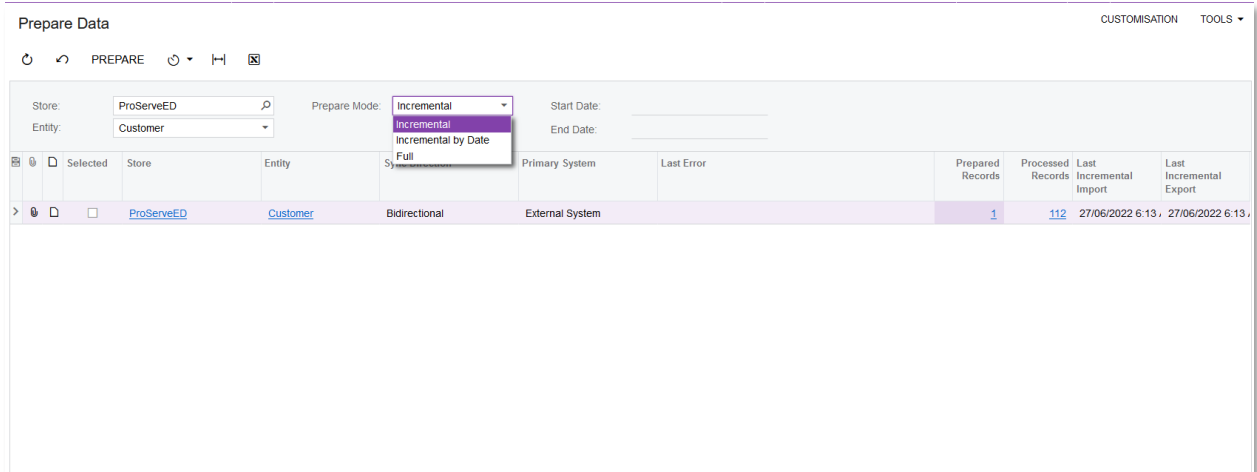


Prepare Data screen (BC501000)

This is the first part of the sync. The Prepare Data screen collates all records that fit the criteria for syncing and put them into a queue, ready for importing/exporting through the “Process Data” screen. In the Prepare Data screen, there are three Prepare Modes:

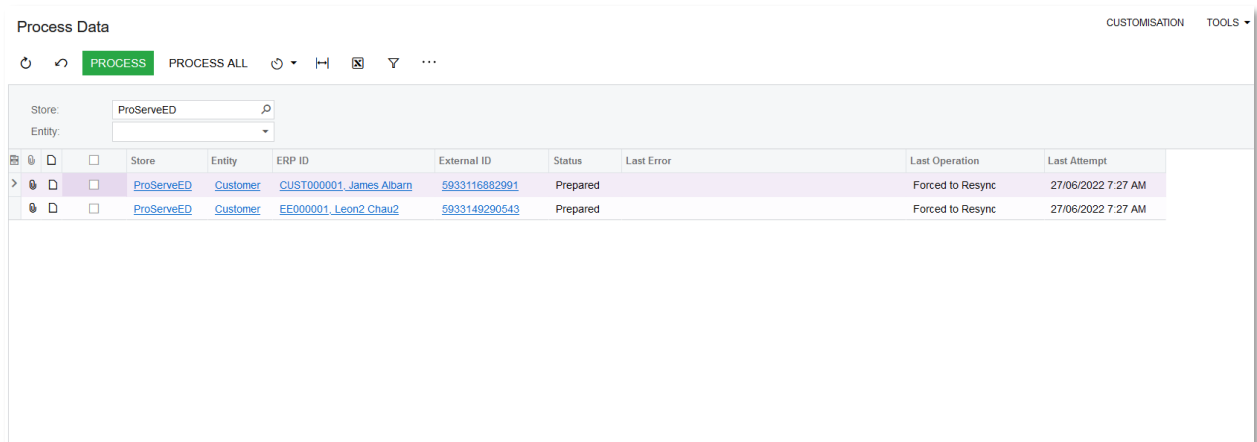
- Incremental: only gather that has not been imported or exported since the Last Incremental Import date and time or Last Incremental Export date and time.

- Incremental by Date: When this value is selected, the Start Date and End Date fields will be available. All records that have been modified within this date range will be put into a queue and ready for import or export.
- Full: all records from the start of time will be put into a queue, ready for import or export. (Except for records that are filtered out through the Import Mapping/Export Mapping on the Entities screen)



Process Data screen (BC501500)

This screen is where the actual Import or Export happens. After records are prepared through the Prepare Data screen, they will appear in this screen, ready to be imported or exported.



Sync History screen (BC301000)

All records that have been processed through the Process Data screen, will appear in the Sync History screen. This screen is very useful, not only because it shows information related to the status of the sync, what operations were carried out during the last sync (e.g. Inserted Externally, Modified Externally, Modified Internally, etc.), whether a record is synced, skipped, filtered or deleted, but also the corresponding error message in case a sync was not successful, to help users troubleshoot.

Sync History

CUSTOMISATION TOOLS

SYNC

Store: ProServeED
Entity: Customer

ALL RECORDS READY TO PROCESS FAILED PROCESSED SKIPPED ABORTED DELETED FILTERED INVALID INACTIVE

ID	Entity	Store	ERP ID	External ID	Status	Last Error	Last Operation	Last Attempt
>	Customer	ProServeED	EE000001_Leon2 Chau2	5933149290543	Prepared		Forced to Resync	27/06/2022 7:27 AM
	Customer	ProServeED	CUST000001_James Albarn	5933116882991	Prepared		Forced to Resync	27/06/2022 7:27 AM
	Customer	ProServeED	KEY_Kelly Key		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	GURUCUST_GURUCUST		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	FC00000002_Franchisee 2		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	FC00000001_Franchisee 1		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	ECOMCUST_eCommerce Ge...		Invalid	The ECOMCUST customer has been skip...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	CUST000206_Snapper Fish...		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	CUST000205_Sole Fisheries		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	CUST000204_Downtown Fis...		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	CUST000203_Up Market Fis...		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	CUST000200_Up Market Fis...		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	CUST000101_Bay City Traders		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	CUST000100_South Bank LJ...		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	CUST000099_Australian Law...		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM
	Customer	ProServeED	CUST000098_QRT financial...		Filtered	The record has been filtered based on the ...	Modified in ERP	23/06/2022 4:40 AM

Understanding key difference between Shopify and BigCommerce:

Both Shopify and BigCommerce are very strong platforms. MYOB remains agnostic when recommending systems.

Comparison:

- Both platforms are cloud intuitive, cloud-based, SaaS eCommerce platforms.
- Shopify offers native POS functionality and an iOS POS App. BigCommerce integrates with 3rd party POS systems.
- BigCommerce offers more marketplace integrations (Amazon, etc) and they also acquired Feedonomics, a marketplace aggregator.
- **Out-of-the-box Shopify does not support customer specific pricing. BigCommerce does. However, the customer needs to be on the Enterprise subscription of BigCommerce to access this feature.**
- Many free or inexpensive themes exist for both platforms to help the customers change the look and feel of their store.
- Both platforms offer a large library of resources, documentation, forums and self-help tools online. BigCommerce typically serves midmarket/enterprise customers. Shopify's customer base covers a very wide range customers – from startups through to enterprise.

Shopify:

- Known for being more oriented to B2C merchants - *Shopify will be releasing their new B2B Edition in 2022.*
- Very large marketplace of add-on apps
- Shopify offers additional services to eComm merchants outside of the eCommerce platform.
- Such as a fulfillment network, representation on the Shop app, integrations with social platforms and Headless capabilities
- Shopify Plus merchants have access to Shopify Flow, a visual workflow manager.

- Shopify's front-end performance is the best in the industry. Meaning, Shopify website pages load faster than other platforms.

BigCommerce:

- Features support both B2C and B2B merchants
- The BigCommerce Marketplace offers hundreds of apps providing extended functionality.
- BigCommerce includes many features in their core which Shopify does not. Instead, Shopify relies on 3rd party app builders to solve these challenges.
- BigCommerce offers functionality to build headless eCommerce sites/apps. BigCommerce offers an “Open SaaS” platform. Which is very flexible. Strong BigCommerce agencies can flex the solution into custom solutions for merchants.
- BigCommerce was built to serve larger, more complex customers.

Commerce Edition Synchronized Entities of each eCommerce Platform:

Entity	Shopify	BigCommerce
Customer Price Classes	No*	Yes
Customers	Yes	Yes
Customer Locations	Yes	Yes
Sales Category	Yes***	Yes
Stock Item	Yes	Yes
Non-Stock Item	Yes	Yes
Template Item	Yes**	Yes
Base Sales Price	No*	Yes
Price List	No*	Yes
Product Images	Yes	Yes
Product Availability	Yes	Yes
Sales Orders	Yes	Yes
Payments	Yes	Yes
Shipments	Yes	Yes
Refunds	Yes	Yes

***Price Class, Base Sales Price, Price List:** Shopify does not currently support these entities in their core. “Sales” price can be applied with MSRP and Default pricing fields on the Stock Items or Non-Stock Items screen. The MSRP will become Shopify’s “Compare At Price” and the Default price will become Shopify’s “Price”. When MSRP is higher than Default Price (Compare At Price is higher than Price), Shopify will show as though the item is “on sale”.

****Template Item:** Shopify’s core solution only support up to 3 variants on a Product with Variants. This means, a Template Item can only have 3 attributes (for example, Size, Colour and Material). Add-on’s are available which will add more variants/attributes but we have not tested our solution with Shopify Add-ons

*****Sales Category:** Shopify handles Sales Categories/Product Categories in a very unique manner. Our solution will export MYOB Advanced Sales Categories as Shopify’s Product Tags.

Synchronization of Entities - BigCommerce

Entity	Direction	Modes	Filtering	Mapping	Custom Fields
Customer Price Classes	Bi-directional	Manual, Schedule, Realtime	Import/Export	Import/Export	No
Customers	Bi-directional	Manual, Schedule, Realtime	Import/Export	Import/Export	Yes
Customer Locations	Bi-directional	Manual, Schedule, Realtime	Import/Export	Import/Export	Yes
Sales Category	Bi-directional	Manual, Schedule, Realtime	Import/Export	Import/Export	No
Stock Item	Export	Manual, Schedule, Realtime	Export	Export	Yes
Non-Stock Item	Export	Manual, Schedule, Realtime	Export	Export	Yes
Base Sales Price	Export	Manual, Schedule	No	No	No
Price List	Export	Manual, Schedule	No	No	No
Product Images	Export	Manual, Schedule	No	No	No
Product Availability	Export	Manual, Schedule, Realtime	No	No	No
Sales Orders	Bi-directional	Manual, Schedule, Realtime	Import/Export	Import/Export	Yes
Payments	Import	Manual, Schedule	Import	Import	Yes
Shipments	Export	Manual, Schedule, Realtime	Export	Export	Yes
Refunds	Import	Manual, Schedule	No	No	No

Synchronization of Entities – Shopify

Entity	Direction	Modes	Filtering	Mapping	Custom Fields
Customers	Bi-directional	Manual, Schedule, Realtime	Import/Export	Import/Export	Yes
Customer Locations	Bi-directional	Manual, Schedule, Realtime	Import/Export	Import/Export	Yes

Stock Item	Export	Manual, Schedule, Realtime	Export	Export	Yes
Non-stock Item	Export	Manual, Schedule, Realtime	Export	Export	Yes
Template Item	Export	Manual, Schedule, Realtime	Export	Export	Yes
Product Images	Export	Manual, Schedule	No	No	No
Product Availability	Export	Manual, Schedule, Realtime	No	No	No
Sales Orders	Import	Manual, Schedule, Realtime	Import	Import	Yes
Payments	Import	Manual, Schedule	Import	Import	Yes
Shipments	Export	Manual, Schedule, Realtime	Export	Export	Yes
Refunds	Import	Manual, Schedule, Realtime	No	No	No

eCommerce Features Supported – Out of the box.

Feature	Shopify	BigCommerce
Support B2C merchants	Yes	Yes
Support B2B merchants	No*	Yes
Gift Card Support	Yes	Yes
Customer Specific Pricing	No	Yes (only with BigCommerce Enterprise Subscription)
Kit Assembly Support	Yes	Yes
Products with variants via Matrix Inventory	Yes	Yes
Control Product Availability based on Inventory Levels	Yes	Yes
Coupons and Discount code support (sync to SO)	Yes	Yes
Volume based discounts	No	Yes
Export offline orders of multiple Order Types to eCommerce “My Account” section	No	Yes
Pay by Terms, COD, in-store pickup	Yes	Yes
Payment information sync	Yes	Yes
Flexible Shipping Options	Yes	Yes

Tracking numbers export to eCommerce Orders	Yes	Yes
Export offline orders to the eCommerce “My Account > Orders” page	No	Yes**
Manage catalogue structure from ERP	Yes***	Yes
Guest customer checkout support	Yes	Yes
Product information management (title, description, images, pricing, videos, SEO, attributes)	Yes****	Yes
Custom field support	Yes	Yes
Supply inventory from multiple warehouses	Yes	Yes
Display inventory levels per warehouse/location on eCommerce	Yes	No
Native POS application support	Yes	No
Sell personalised items	Yes	Yes
Sell Gift Wrapping service and submit Gift Messages	No	Yes
Map Data from ERP to eCommerce Customer/Meta fields	Yes	Yes

*B2B merchant support is possible if customer specific pricing is not required.

**Merchant chooses which Order Types should be exported to BigCommerce. The products on the order are required to reside on the BigCommerce database, even if not visible to the public. This is required so BigCommerce can render product information (title, short description, images, etc.) on the “My Account > Orders” page.

***Shopify’s catalogue structure is unique – Sales Categories will be exported as Tags

**** Videos are not supported in the Shopify connector. Shopify’s REST API does not accept Youtube and Vimeo URLs

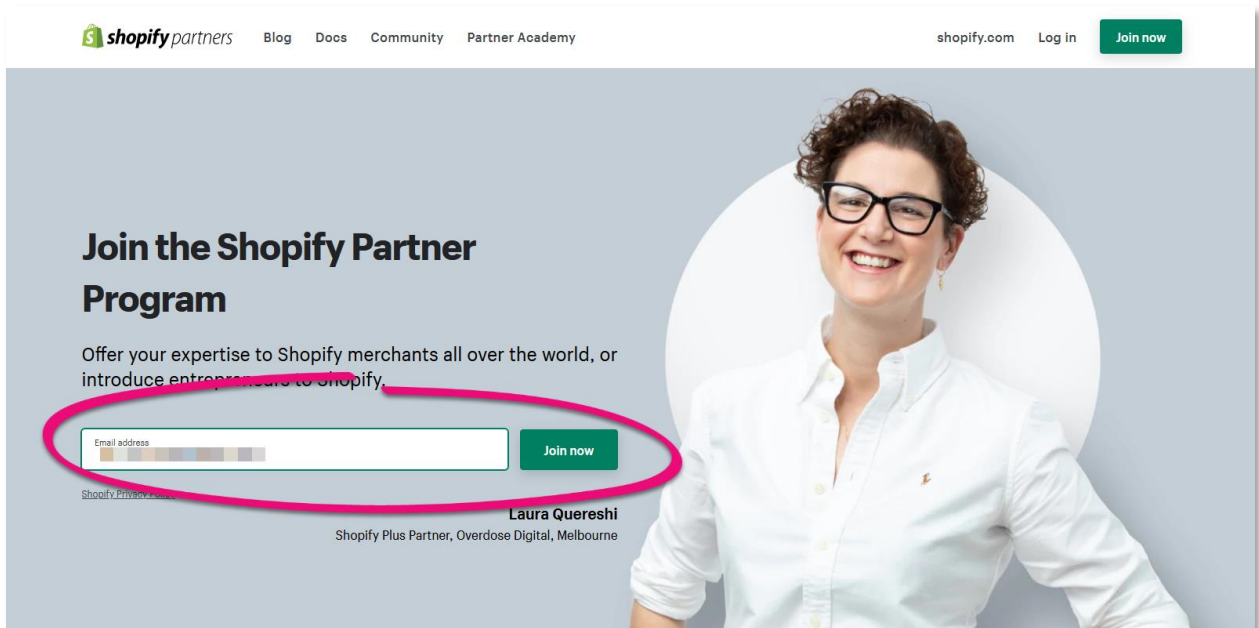
Establish Connection Between MYOB Advanced and Shopify

NOTE: in a normal scenario, you will likely configure Shopify integration for your customer’s existing store. The integration process is similar. However, this guide also covers the setup of a Shopify store using Shopify partner’s program so that you can set up a store for testing purposes without being limited by the two weeks trial duration by Shopify.

If you have already had a Shopify store up and running, you can skip the “Create a Shopify Store” part.

Create a Shopify Store

1. To set up a test store using Shopify Partners program, go to:
<https://www.shopify.com.au/partners> - enter your email address and click join now to register as a partner:



2. Enter your first name, last name, email address and password to create a new Shopify ID. Click Create Shopify ID when finish.



Create a Shopify ID

Your account will allow you to partner with Shopify

Email

ProServeED@protonmail.com

First name

ProServe

Last name

ED

Enter your first and last name as they appear on your government-issued ID.

Password

.....



Password strength: strong.

Confirm new password

.....|



Create Shopify ID

By proceeding, you agree to the [Terms and Conditions](#)

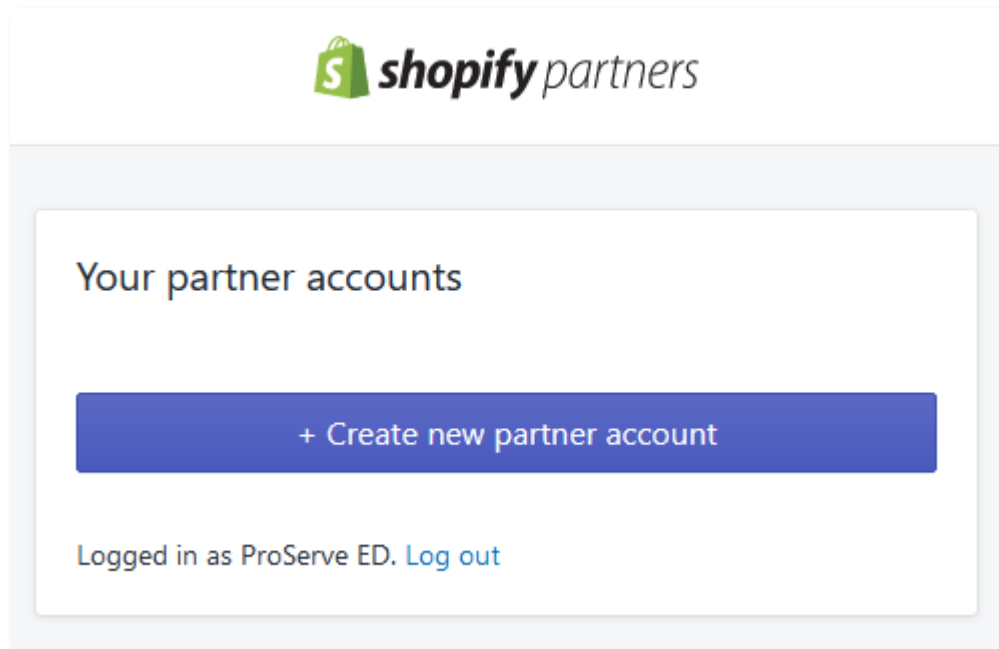
Already have a Shopify ID? [Log in](#)

[Help](#)

[Privacy](#)

[Terms](#)

3. Click Create New Partner Account:



4. You will be prompted to the next screen where you will need to fill in your details for the Shopify Partner Account. Fill in the details as required. Once you finish, click "View Your Dashboard" at the bottom of the screen.

Account Information

All fields are required unless otherwise noted

Business name

You can always change this later

Primary business email address

This email will be used to send you important messages, such as feature updates and breaking changes

Website (optional)

Address 1

Address 2 (optional)

City

Country/Region

State/territory

ZIP / Postal code

5. Once you can see your dashboard, before you can create a new store, you need to verify the email address that you've registered with Shopify. Go into your mailbox and find the email from Shopify to verify your email address.


Welcome, myob!

Development stores let you build a store with an unlimited development period. After transferring ownership, earn a share of your client's ongoing subscription fee.


Earn ongoing revenue by building Shopify stores for your clients

1. Get unlimited development time to build and test a new store
2. Customize themes, add products, test payment gateways, and more
3. Transfer store ownership to your client and retain access through your partner account
4. Help your client select a paid plan to earn monthly referral payouts



 First, confirm proserveed@protonmail.com as your business email address. [Resend confirmation email](#)

Create store

 [Learn more about development stores](#)

6. Once you have verified your email, go back to Shopify. You can now create a new store. Click "Create Store" to create a new Shopify store:

Welcome, myob!


Development stores let you build a store with an unlimited development period. After transferring ownership, earn a share of your client's ongoing subscription fee.

Earn ongoing revenue by building Shopify stores for your clients

1. Get unlimited development time to build and test a new store
2. Customize themes, add products, test payment gateways, and more
3. Transfer store ownership to your client and retain access through your partner account
4. Help your client select a paid plan to earn monthly referral payouts



Create store

 [Learn more about development stores](#)

7. In the Add Store page, enter the store name, login information

Add store

Store type

Each store type has unique limitations and features designed for its particular purpose. Pick a store type that best suits your needs.

You can test how customers pay for their orders using the [Shopify Bogus Gateway](#) or [Shopify Payments test mode](#) .

You can give staff members the ability to work on this store after it's been added.

Pick a store type

Development store

Test apps or themes you create, or set up and demo a store for a client. Transferring ownership to a client can give you a recurring revenue share.

Managed store

Access an existing Shopify store by requesting a collaborator account to provide client services or support for your apps. You can add up to 500 pending requests at a time.

Login information

Give your store a name and enter the password you want to use to log in to the store directly. You'll use your business email address to log in: `proserveed@protonmail.com`.

Store name

ProServe.ED

Store URL

proserve-ed

.myshopify.com

Login

proserveed@protonmail.com

We'll use this address if we need to contact you about your account.

Password

••••••••

Confirm password

••••••••

8. Enter the store address and press Save:

Developer preview New

Create store with transfer disabled to use a developer preview

Add a developer preview to this store to test unreleased features and updates to the Shopify admin. [Learn more about developer previews](#).

Store address

Let us know where your store is located.

Address
168 Cremorne Street

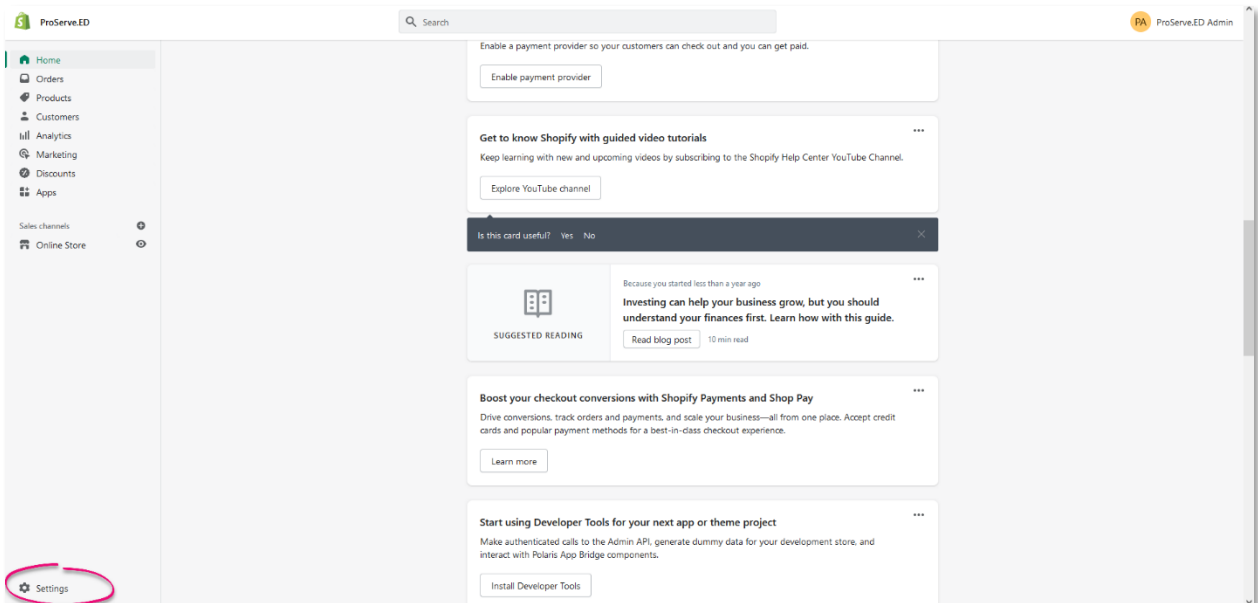
City: Cremorne Postal / ZIP code: 3121

Country: Australia State/territory: Victoria

9. Your online store will now be created. To access the store's admin page, in the browser, enter the <https://<storeURL>/admin> - the store URL is set up in step 7 (see screenshot).

Initial configuration for the Shopify store

1. Access your Shopify store admin page (<https://<storeURL>/admin>)
2. Click Settings at the bottom left of the screen:



3. In the Store Details tab, scroll down to the bottom and set the store currency, time zone and Unit of Measure for your store accordingly:

Store currency
The currency your products are sold in. To change your payout currency, go to [payments settings](#).

Store currency
Australian dollars (AUD) [Change formatting](#)

Standards and formats
Used to calculate product prices, shipping weights, and order times.

Time zone
(GMT+10:00) Canberra, Melbourne

Unit system: Metric system Default weight unit: Kilogram (kg)

EDIT ORDER ID FORMAT (OPTIONAL)
Order numbers start at #1001 by default. While you can't change the order number itself, you can add a prefix or suffix to create IDs like "EN1001" or "1001-A."

Prefix: # Suffix:

Your order ID will appear as #1001, #1002, #1003 ...

- Click on the Payments tab, and scroll down to the Manual Payment Methods section, add a new manual payment method for "Cash On Delivery (COD)". Click "Activate Cash On Delivery (COD)":

Manual payment methods

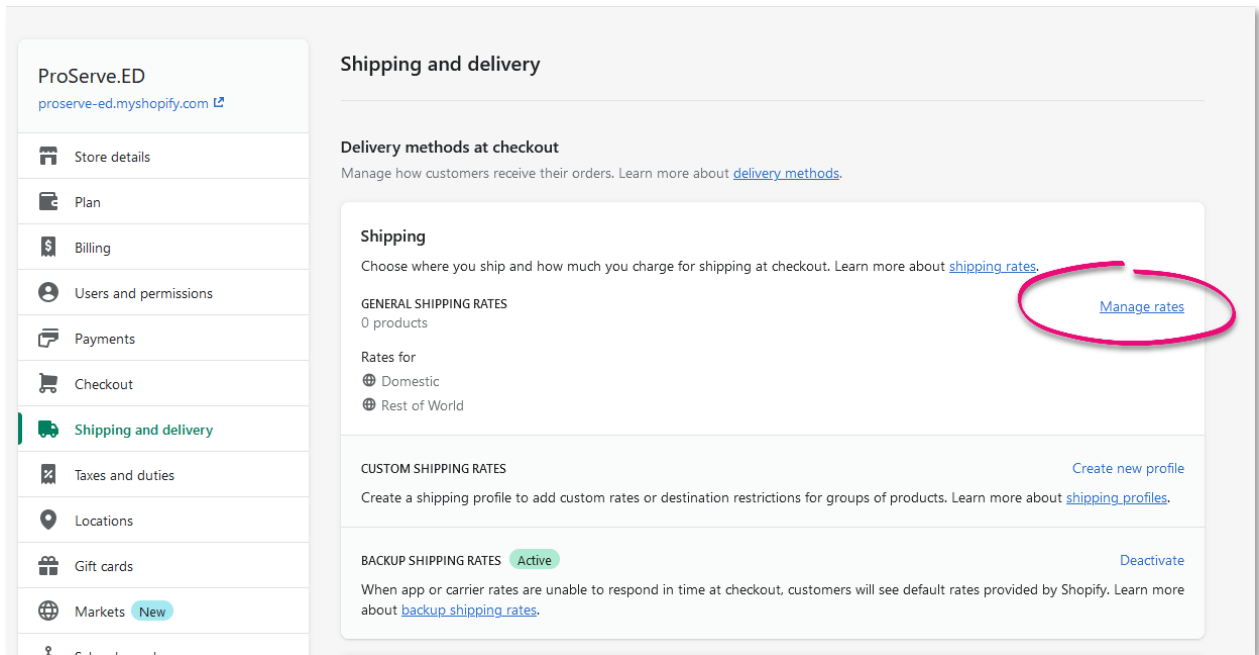
Payments that are made outside your online store. When a customer selects a manual payment method such as cash on delivery, you'll need to approve their order before it can be fulfilled.

Cash on Delivery (COD) [Manage](#)

[Add manual payment method](#) ▼

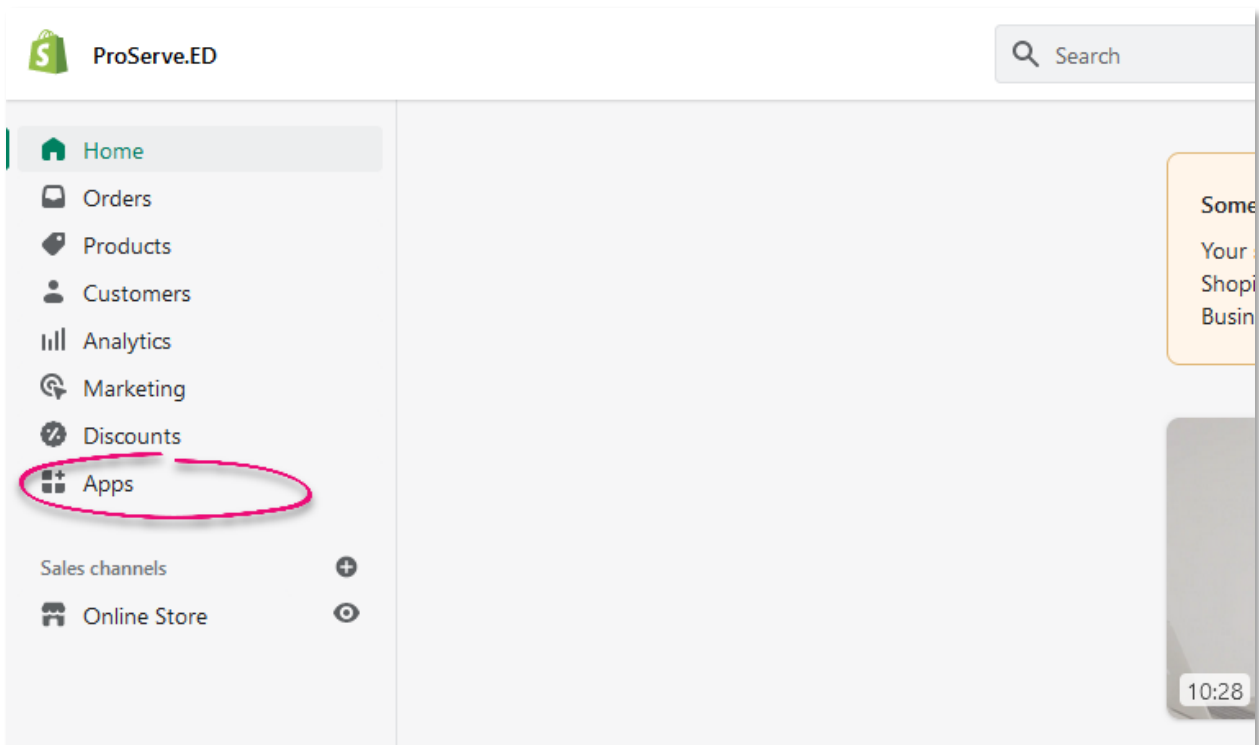
- Click on the Shipping and delivery tab, you should already see that there are two shipping zones: Domestic and Rest of the world. If required, click on Manage Rates to

manage the shipping rates. Otherwise, the basic configuration of the store to support the integration between Shopify and MYOB Advanced is finished.



Capture store connection information

1. Sign into the Shopify admin dashboard
2. On the menu on the left, click on Apps







3. Click on Develop apps for your store:

Apps Develop apps Customize your store

Customize your store with the apps merchants love most. ...

Starter pack Get customers Find products Stand out

TRY DROPSHIPPING
You pick which products to feature, they ship them to your customers.

-  **Oberlo - Dropshipping App**
Find products to sell on Shopify
★ 4.3 (2,432 reviews) • Free plan available
-  **OptiMonk Popups: Email, Upsell**
Email Pop ups, Exit Intent Popup, Upsell Pop ups & more.
★ 4.9 (491 reviews) • Free plan available
-  **Sales Countdown Timer Bar 2.0**
Countdown timer+counter. Count down clock. Sale countdown!
★ 4.5 (548 reviews) • Free plan available
-  **Facebook channel**
Bring your products to Facebook and Instagram users.
★ 4.1 (3,673 reviews) • Free plan available


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[How app recommendations work](#)

Build custom apps for your unique needs

Develop custom apps to integrate data or build a custom storefront.

[Develop apps for your store](#) [Learn more](#)



4. Click "Allow Custom App Development". Shopify will prompt you to the next screen where you'll have to agree on some the terms and conditions. Click "Allow Custom App Development" again to agree.



Start developing apps on your store

Develop your own apps to integrate your store's data with external services or build custom storefronts.

App development should only be done by trusted developers on your team. Apps can give API access to your data, and that data can be accessed outside of Shopify.


All apps are subject to the [Shopify API License and Terms of Use](#).

Allow custom app development

Learn more about [developing apps for your store](#)

5. In the App Development page, click "Create an app"

← App development



Create a custom app

Integrate your store's data with external services or build a custom storefront. Apps are subject to the [Shopify API License and Terms of Use](#).

Create an app

Develop apps with caution

All apps are subject to the [Shopify API License and Terms of Use](#) . In addition, you should not use apps to customize checkout.

App development allowed on 22 February 2022 by ProServe.ED Admin (proserveed@protonmail.com).

Learn more about [custom apps](#)

6. Enter an app name, then click Create App.

Create an app ✕

App name

App developer

 ⌵

Can only be assigned to staff and collaborators with permission to develop apps. We'll contact them about development updates, like changes to Shopify APIs.

Apps are subject to the [Shopify API License and Terms of Use](#) .

7. In the Overview tab, click Configure Admin API scopes:

The screenshot shows the 'App development' interface for 'MYOB Advanced ERP Integration'. The 'Overview' tab is selected. The main content area is titled 'Select your access scopes to get started' and contains two options: 'Retrieve and sync store data with the Admin API' (with a 'Configure Admin API scopes' button circled in red) and 'Develop unique shopping experiences with Storefront API' (with a 'Configure Storefront API scopes' button). To the right, there is a section for 'Explore documentation to speed up development' with three links: 'Access store data with the Admin API', 'Develop custom shopping experiences with Storefront API', and 'Authenticate with access tokens'. Below this is a 'Development history' section with a table showing one event: 'App created' by 'proserveed@protonmail.com' on '22 Feb 2022 at 01:02'.

App development > MYOB Advanced ERP Integration Install app

Overview Configuration API credentials App settings

Select your access scopes to get started

Retrieve and sync store data with the Admin API. Configure Admin API scopes

Develop unique shopping experiences with Storefront API. Configure Storefront API scopes

Explore documentation to speed up development

[Access store data with the Admin API](#)

[Develop custom shopping experiences with Storefront API](#)

[Authenticate with access tokens](#)

Development history
All times in UTC.

Event	User	Date
App created	proserveed@protonmail.com	22 Feb 2022 at 01:02

8. In the Admin API Access Scope, grant all access rights to your app. If you don't want to grant all access rights, MYOB Advanced Shopify Integration requires access rights in at least: Customers, Addresses, Orders, Products, Refunds, Fulfillments, Discounts, Files & Images, Gift Cards, Inventory, Locations, Payments, Transactions, Prices, Locales;

Overview **Configuration** API credentials App settings

Configuration > Admin API integration

Admin API access scopes

All Selected **7**

Filter access scopes

Analytics
View store metrics read_analytics

Assigned fulfillment orders
View or manage fulfillment orders write_assigned_fulfillment_orders
 read_assigned_fulfillment_orders

Customers
ⓘ Includes personally identifiable information
View or manage customers, customer addresses, order history, and customer groups write_customers
 read_customers

Discounts
View or manage automatic discounts and discount codes write_discounts

9. In the Webhook Subscription area, leave the default value. Then press Save:

Themes
View or manage theme templates and assets

- write_themes
- read_themes

Third-party fulfillment orders
View or manage fulfillment orders assigned to a location managed by any fulfillment service

- write_third_party_fulfillment_orders
- read_third_party_fulfillment_orders

Translations
View or manage content that can be translated

- write_translations
- read_translations

Webhook subscriptions

Event version




2022-01 (Latest)

If your app creates a webhook subscription, it'll use this API version.

Google Cloud Pub/Sub

Amazon EventBridge

Subscribe to events using [webhooks](#), or use a cloud service to scale your event integration.

-  [Work with versioned webhooks](#)
-  [Start using Google Cloud Pub/Sub](#)
-  [Start using Amazon EventBridge](#)

Cancel **Save**


10. In the API Credentials tab, click Install App:

App development > MYOB Advanced ERP Integration Install app

Overview Configuration **API credentials** App settings




API credentials

Access tokens

 You don't have any access tokens yet. To get your Admin API access token, install your app.

Install app

Keep your access tokens secure. Only share them with developers that you trust to safely access your data.

-  [Authenticate with access tokens](#)
-  [Start using the Admin API](#)
-  [Start using the Storefront API](#)

API key and secret key

API key

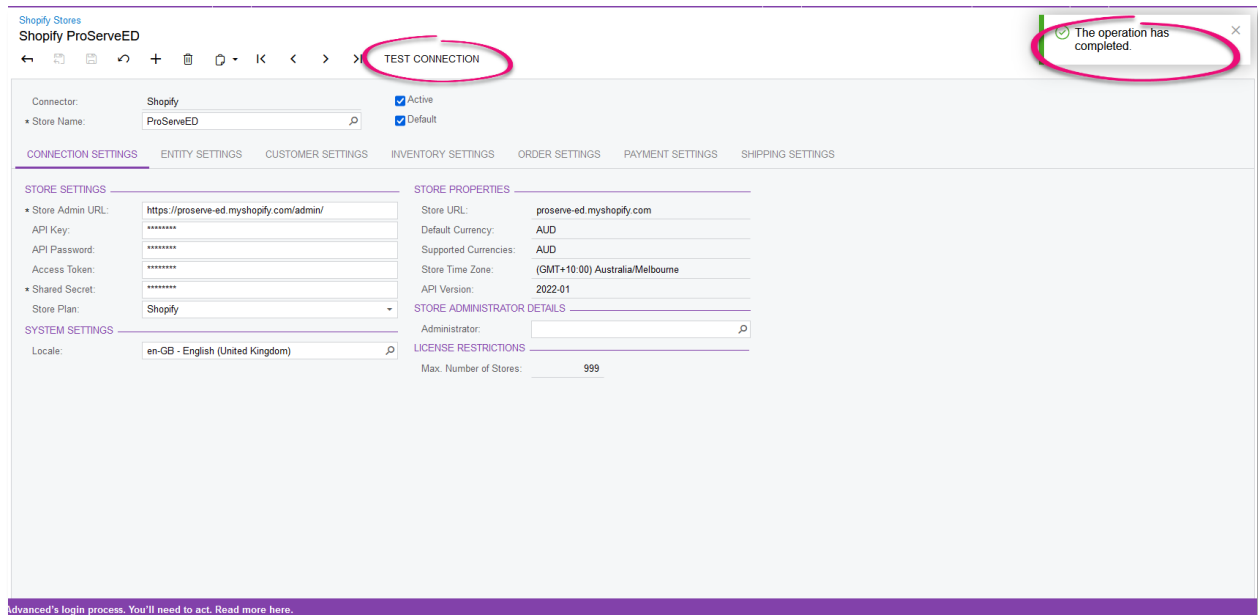
API secret key

Created 22 Feb 2022 at 01:02 UTC

Use your client secret to [verify incoming webhooks](#).

11. Once you've installed the app, an access token is created. Note down the Access Token, API Key and API secret key for the app and store them at a secure place.

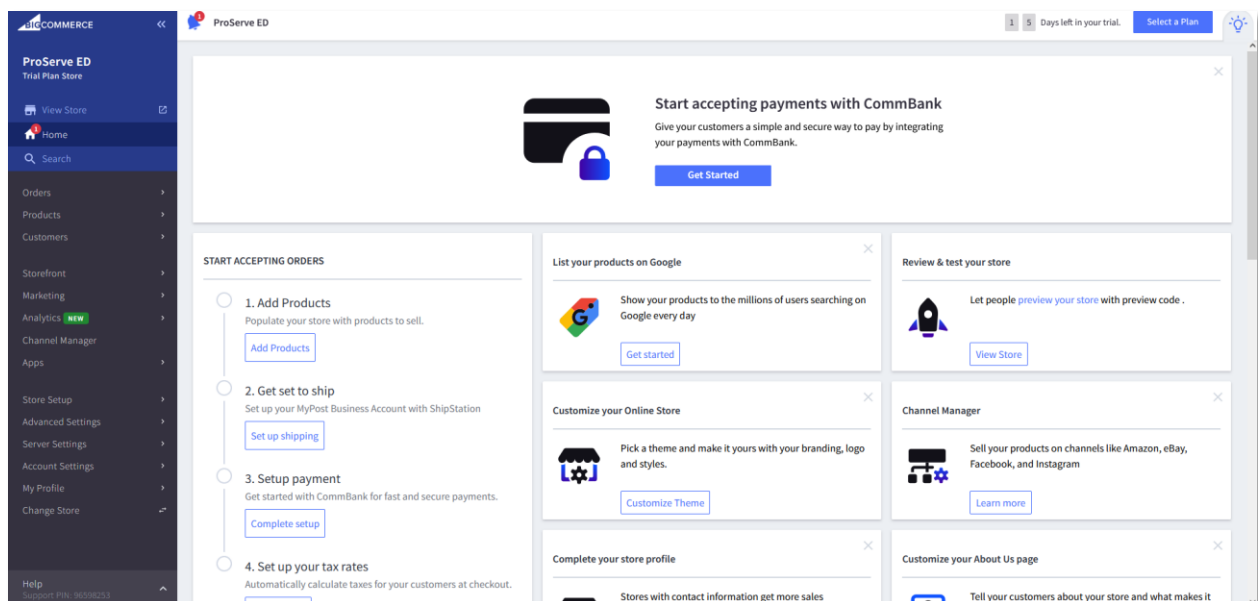
2. Click “Test Connection” – if everything above is done correctly, the Test Connection should be successful:



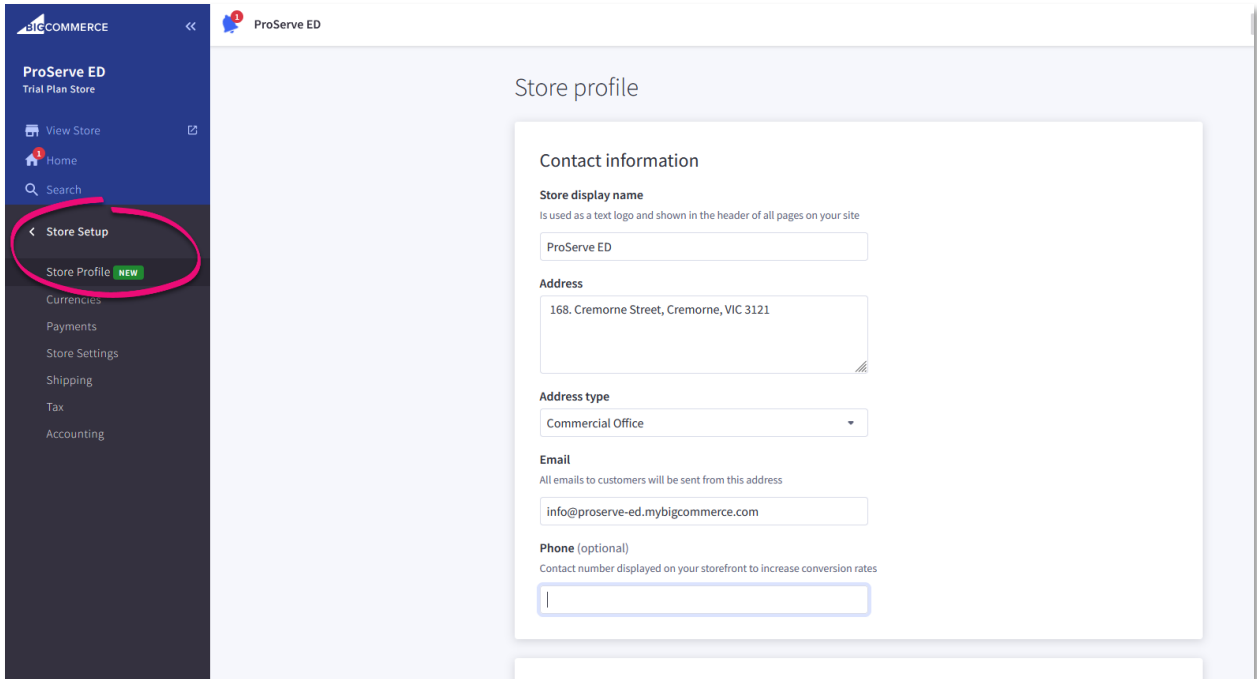
Establish Connection between MYOB Advanced and BigCommerce

Create a BigCommerce store and complete store configuration (optional if you have already had a store)

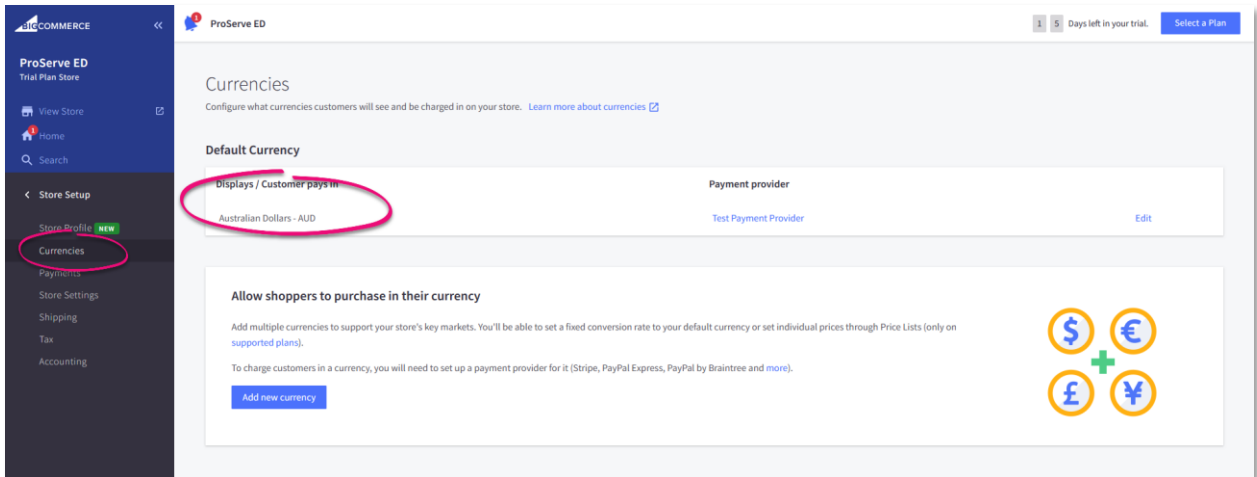
1. Go to BigCommerce website, sign up and set up for a new BigCommerce store. You can follow BigCommerce’s instruction [here](#).
2. Once you have signed up for a store, the store area should look like this:



3. On the left navigation pane, select Store Setup > Store Profile. Enter the necessary store information such as address, phone number, country, etc. It's very important to ensure the store's country is correct because it affects a range of shipping and payment methods for your store.



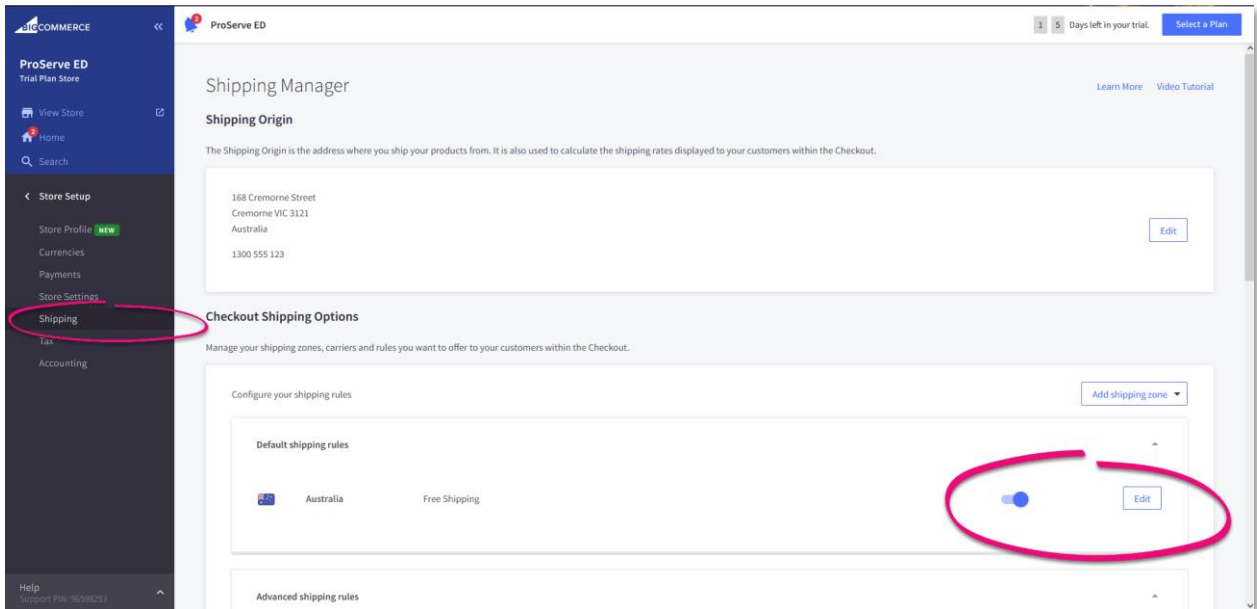
4. In Store Setup > Currencies, make sure that the default currency is the currency that you want to display the price for the store, or wants the customer to pay in that currency. If the default currency here is not the currency you want, then you need to add that currency in, and then set the new currency as the default currency:



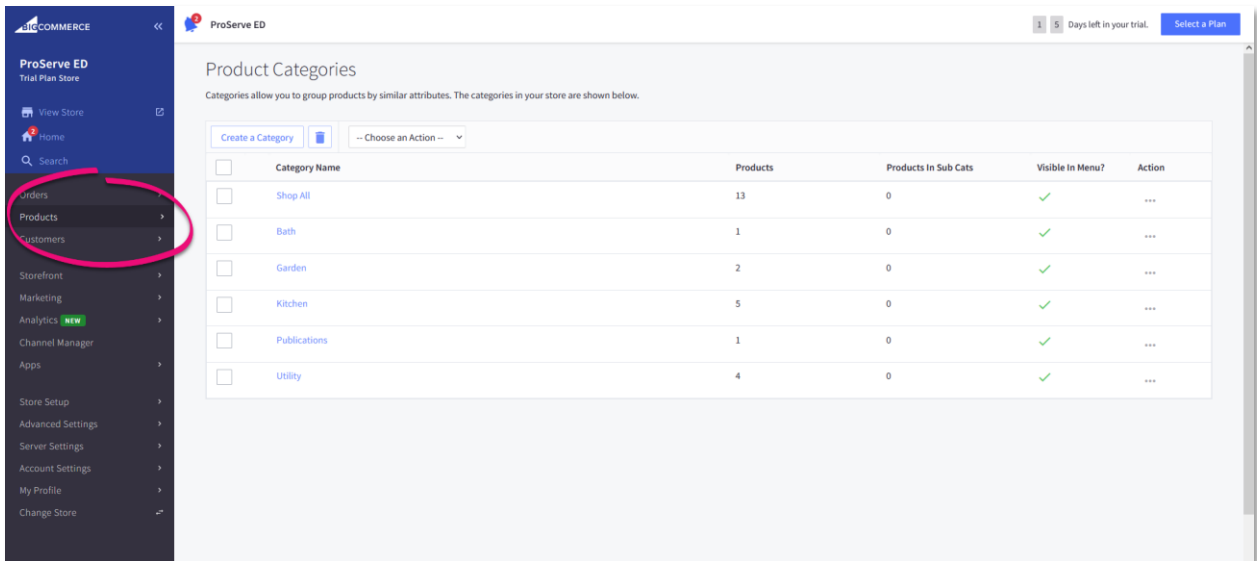
5. In Store Setup > Payments. Review the payment method for your store. If required, you can set up additional payment methods, for example, we'll be adding the Pay In Store payment method here for testing purposes.



6. In Store Setup > Shipping, review the Shipping Zones and Shipping Rules for your store as required. You can add free shipping for a Shipping Zone here as well:



7. If required, delete the existing customers, customer groups, products and product categories, and archive existing sales orders that is part of BigCommerce's demo data in the relevant areas:



Configure myob advanced erp for integration

- Go to the screen Enable/Disable features (CS100000), ensure at least the below features are enabled:
 - Inventory
 - Business Account Locations
 - Commerce Integration
 - BigCommerce Connector
- In the Customer Classes screen (AR201000), create a new Customer Class for BigCommerce Customer (e.g. we'll be calling this customer Class ECUSTOMER):

Customer Classes
ECUSTOMER - Ecommerce Customer

← ↻ 📄 ⌂ ⏪ ⏩ ⏴ ⏵ ACTIONS ▾

★ Class ID: 🔍
Description:

GENERAL SETTINGS | GL ACCOUNTS | ATTRIBUTES | MAILING SETTINGS

DEFAULT GENERAL SETTINGS

Country: 🔍
Restrict Visibility To:
Tax Zone ID: 🔍
 Require Tax Zone
Tax Calculation Mode:
 Default Location ID from Branch
Default Restriction Group:
Salesperson ID: 🔍

DEFAULT DELIVERY SETTINGS

Ship Via:
Shipping Terms:
Shipping Rule:

DEFAULT FINANCIAL SETTINGS

Terms: 🔍
Statement Cycle ID: 🔍
Payment Method: 🔍
 Auto-Apply Payments
 Apply Overdue Charges
Overdue Charge ID:
 Enable Write-Offs
Write-Off Limit:
Currency ID: 🔍 Enable Currency Override
Currency Rate Type: 🔍 Enable Rate Override
Group/Document Disco...:
 Pay by Line
 Apply Retainage

DEFAULT CREDIT VERIFICATION SETTINGS

- In the Numbering Sequences screen (CS201010), create new numbering sequences that will be used for importing new customers and customer locations from BigCommerce:

Numbering Sequences

* Numbering ID:

* Description:

Manual Numbering

* New Number Symbol:

Branch	* Start Number	* End Number	* Start Date	* Last Number	* Warning Number	* Numbering Step
>	EL000000000	EL999999999	1/01/1900	EL000000000	EL999999899	1

Numbering Sequences

* Numbering ID:

* Description:

Manual Numbering

* New Number Symbol:

Branch	* Start Number	* End Number	* Start Date	* Last Number	* Warning Number	* Numbering Step
>	EC000000000	EC999999999	1/01/1900	EC000000000	EC999999899	1

- Create a customer to be used for guest orders from BigCommerce:

Customers

ECOMGUEST - E-Commerce Customer NOTES FILE

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* Customer ID: ECOMGUEST - E-Commerce Custom ⓘ Balance: 0.00
 Customer Status: Active Prepayment Balance: 0.00
 * Customer Class: CUSTDFT - Customer Default ⓘ Retained Balance: 0.00

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES ACTIVITIES GL ACCOUNTS MAILING SETTINGS

ACCOUNT INFO **PRIMARY CONTACT**

* Account Name: E-Commerce Customer Name: First Name Last Name

ACCOUNT ADDRESS Job Title:
 Address Line 1: VIEW ON MAP Email: ⓘ
 Address Line 2: Business 1 Cell
 City:
 State: ⓘ
 Postal Code:
 * Country: AU - AUSTRALIA ⓘ

CONTACT PERSONAL DATA PRIVACY

Consented to the Processing of Personal Data
 Date of Consent:
 Consent Expires:

ADDITIONAL ACCOUNT INFO

Business 1
 Business 2

- In the Item Sales Categories screen, create a new Item Sales Category called "Other" which will be used for Stock and Non-stock items that are imported from BigCommerce that don't have their own categories

Item Sales Categories

Categories

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AUTEST

- Standard Products
- Other

* Description: Other Parent Category: AUTEST ⓘ

Category Members

🔄 + × 🗑️ ⌂ ADD ITEMS |

<input type="checkbox"/>	Inventory ID	Description	Item Class	Item Status
No records found. Try to modify parameters above to see records here.				

- In the Order Types screen (SO201000), create two Order Types, one for E-Commerce Sales Orders which is based on the SO Order Type template, the other one is for E-Commerce Return Orders which is based on the RC Order Type template.

Order Types
EO - ECommerce Orders

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* Order Type: EO Active
 Description: ECommerce Orders
 Order Template: SO - Sales Order

GENERAL SETTINGS TEMPLATE SETTINGS

ORDER SETTINGS

* Order Numbering Sequence: SOORDER
 Days To Keep: 30

- Hold Orders on Entry
- Hold Document on Failed Credit Check
- Require Control Total
- Bill Separately
- Ship Separately
- Calculate Freight
- Ship in Full if Negative Quantity Is Allowed
- Supports Approval
- Disable Automatic Discount Update
- Recalculate Discount On Partial Shipment
- Copy Notes
- Copy Attachments
- Copy Line Notes To Shipment
- Copy Line Attachments To Shipment
- Copy Line Notes To Invoice
 - Only Non-Stock
- Copy Line Attachments To Invoice
 - Only Non-Stock
- Require Customer Order Nbr.

POSTING SETTINGS

- Use Sales Account from: Inventory Item
- * Combine Sales Sub. From: III-III-III
- * Freight Account: 600660 - Freight Expenses
- Use Freight Account from: Ship Via
- * Freight Sub.: 000-000-000 - Default
- * Combine Freight Sub. from: LLL-LLL-LLL
- * Discount Account: 600670 - Discount Given
- Use Discount Account from: Customer Location
- * Discount Sub.: 000-000-000 - Default
- * Combine Discount Sub. from: LLL-LLL-LLL
- Post Line Discounts Separately
- Use Discount Sub. from Sales Sub.
- Auto Write-Off

INTERCOMPANY POSTING SETTINGS

- Use Sales Account from: Inventory Item
- Use COGS Account from: Inventory Item

FIELD SERVICES SETTINGS

- Enable Field Services Integration

7. In the Ship via Code screen (CS207500), review and create a Ship via Code if necessary for sales orders from BigCommerce:

Ship via Codes
LOCAL - Local

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* Ship Via: LOCAL 🔍
 * Description: Local

DETAILS FREIGHT RATES PACKAGES

Calendar: AUCALENDAR - Australian C 🔍 ✎
 Calculation Method: Per Unit
 Base Rate: 0.00
 Common Carrier
 Calculate Freight on Returns

Tax Category: 🔍 ✎
 * Freight Sales Account: 400000 - Sales 🔍
 * Freight Sales Sub.: 000-000-001 - Franchisee 1 🔍
 * Freight Expense Accou...: 630000 - Freight 🔍
 * Freight Expense Sub.: 000-000-001 - Franchisee 1 🔍

8. Create a new Payment Method for BigCommerce, add a Cash Account into that Payment Method and also, assign that Payment Method as a default payment method to the guest commerce customer we created above (step 4, section B).

Payment Methods
ONLINE - Online Payment Method for E-Commerce NOTES ACTIVITIES FILES CUSTOMISATION

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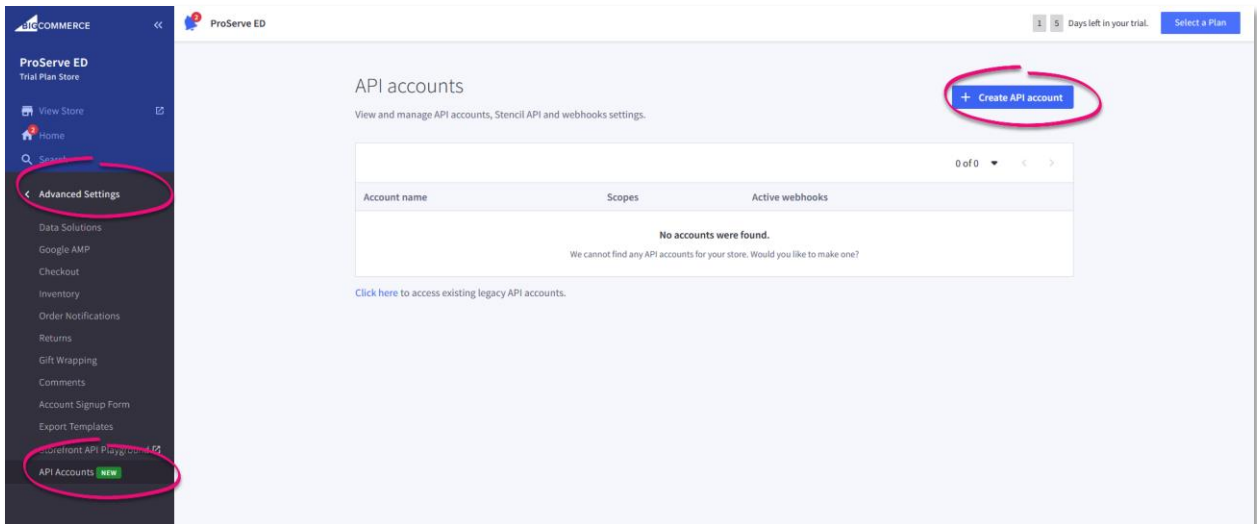
* Payment Method ID: ONLINE 🔍 Use in AP
 Active Use in AR
 Contains Personal Data Use in Payroll
 Means of Payment: Cash/Cheques Require Remittance Information for Cash Account
 * Description: Online Payment Method for E-Commerce

ALLOWED CASH ACCOUNTS SETTINGS FOR USE IN AR SETTINGS FOR USE IN AP REMITTANCE SETTINGS

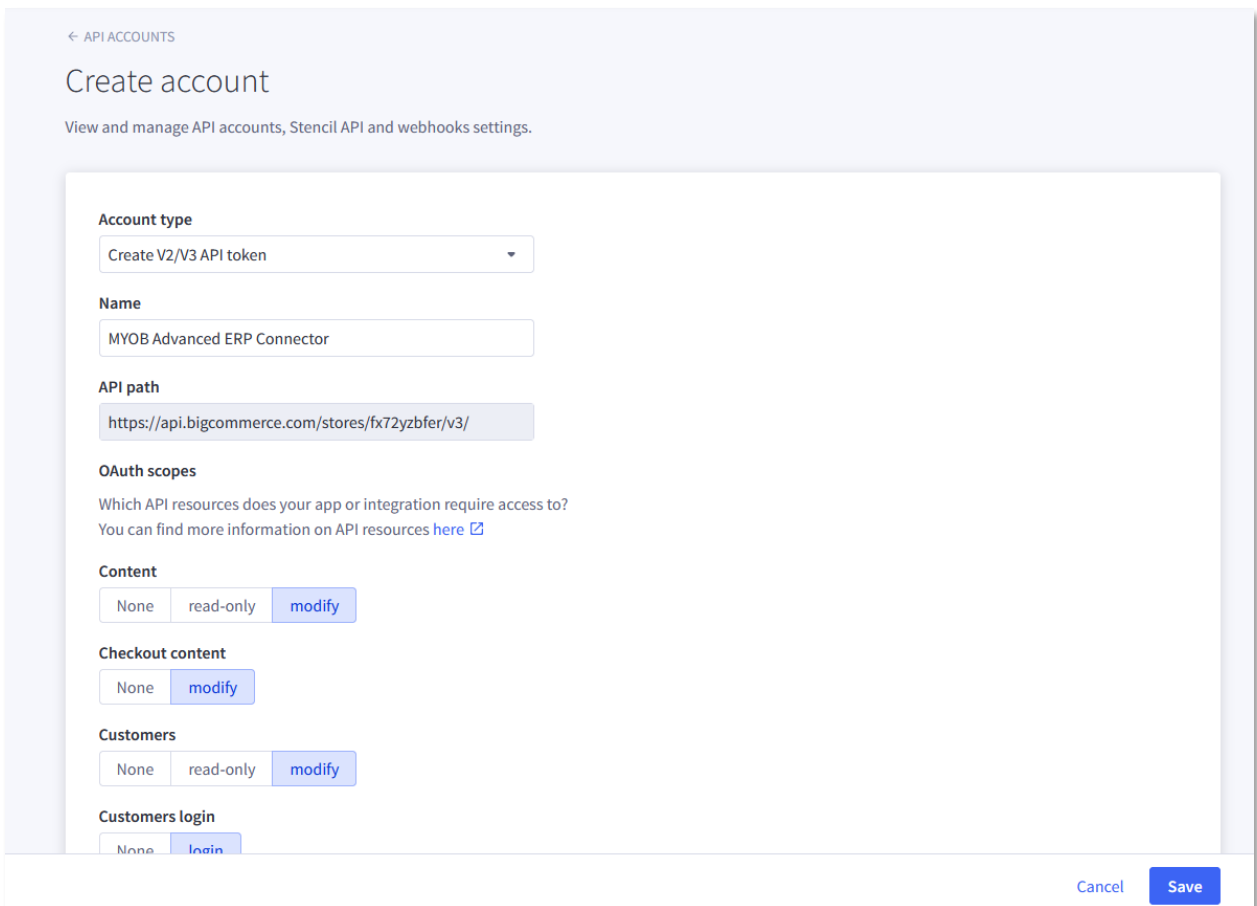
Cash Account	Description	Branch	Use in AP	API Payroll Default	AP - Suggest Next Number	AP Last Reference Number	Batch Last Reference Number	Use in AR	AR Default	AR Default For Refund	AR - Suggest Next Number	AR Last Reference Number
100040	Cheque Account - NZD	RBYTEMAIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Capture store connection information

1. Log on to your store admin page by entering <https://<yourStoreURL>/manage/> - in the navigation menu on the left, select Advanced Settings > API Accounts and select Create API Account:



2. Select Account Type = Create V2/V3 API token. Enter a name for the API account. In the OAuth scopes area, set the highest (rightmost) access rights to every setting. Click Save when finished.



3. After you click save, BigCommerce will generate the Client ID, Client Secret, and Access Token. Copy these values and store them in a safe place. In this step, if you're using Chrome or Firefox or Edge, a download for a .txt file will also be automatically triggered – **it's very important to save this text file because it contains your API Path which will be used for establishing the connection between the store and the ERP.**

BigCommerce API credentials

If you are using Chrome, Firefox, or Edge a text file containing the API token and client ID should have downloaded to your computer.

Client ID

[Redacted Client ID]



Client secret

[Redacted Client Secret]



Access token

[Redacted Access Token]



This is the only copy you will have access to. If you lose it, delete the account and create a new one...

Done

4. Go to Server Settings > File Access (WebDAV) and copy the WebDAV details for the store and save them in a secure place:

WebDAV allows you to access the file storage for your store so that you can download your store's assets or upload new assets. [Learn how](#) - it takes just a few minutes.

Setup Details

WebDAV Path: [Redacted]

WebDAV Server Type: WebDAV (HTTPS/SSL)

WebDAV Username: [Redacted]

WebDAV Password: [Redacted] [Copy To Clipboard](#)

Cyberduck Connection File: [Download](#) 🧑‍🔧 [\(How do I use this?\)](#)

Establish connection between MYOB Advanced and BigCommerce

1. In MYOB Advanced, go to the BigCommerce Store screen (BC201000), create a new store.

BigCommerce Stores

Connector: BigCommerce Active
 * Store Name: BC ProServe ED Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS ORDER SETTINGS PAYMENT SETTINGS

* Store Admin Path: STORE PROPERTIES

REST SETTINGS

* API Path: Default Currency:
 * Client ID: Store Time Zone:
 * Access Token:

WEBDAV SETTINGS

* WebDAV Path:
 * WebDAV Username:
 * WebDAV Password:

SYSTEM SETTINGS

Locale:

2. Enter the Store Admin Path, which is the Store URL and the /manage suffix, for example: <https://<yourStoreURL>/manage>, then enter all the information obtained from section C such as API Path, Client ID, Access Token, WebDAV Path, WebDAV username and Password into the store. Refer to the .txt file that was automatically downloaded when you created the API account above.
 - When entering the API Path, you need to enter the API path **without** the version

BigCommerce Stores

Connector: BigCommerce Active
 * Store Name: BC ProServe ED Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS ORDER SETTINGS PAYMENT SETTINGS

* Store Admin Path: STORE PROPERTIES

REST SETTINGS

* API Path: Default Currency:
 * Client ID: Store Time Zone:
 * Access Token:

WEBDAV SETTINGS

* WebDAV Path:
 * WebDAV Username:
 * WebDAV Password:

SYSTEM SETTINGS

Locale:

3. Once all information has been entered, click “Test Connection”. If the Test Connection is successful, that means you have successfully established the connection between BigCommerce and MYOB Advanced.

Standard field mappings

To reference which fields are mapped between BigCommerce/Shopify and MYOB Advanced as part of the synchronization, you can access the following pages in the in-product User Guide:

Customer Entity

2 minutes to read

This topic provides reference information about the standard filtering and field mapping used for the Customer entity during the synchronisation between MYOB Advanced and BigCommerce. The topic also contains information about the merging of duplicate records during the synchronisation.

In This Topic

- Customer Filtering
- Merging of Duplicates
- Customer Export Mapping
- Customer Import Mapping
- Customer Import Mapping

Customer Filtering

During the export of the Customer entity from MYOB Advanced, the guest customer account—which is the account selected in the **Generic Guest Customer** box on the **Customer Settings** tab of the **BigCommerce Stores (BC201000)** form—is excluded from synchronisation.

Merging of Duplicates

During the synchronisation of the Customer entity (for both the Export direction and the Import direction), a customer record in the source system is merged with an existing customer record in the target system if both records have the same email address.

Customer Export Mapping

The following table shows the mapping of MYOB Advanced fields to BigCommerce fields that is used during the export of customer data to BigCommerce.

Source Fields (MYOB Advanced)		Target Fields (BigCommerce)		
Field Name	Form Object	Field Name	Page Object	Notes
Customers (AR303000) form				
Name (part before the first space)	General tab > Primary Contact section	First Name	Edit Customer page > Customer Details section	
Name (part after the first space)	General tab > Primary Contact section	Last Name	Edit Customer page > Customer Details section	
Account Name	General tab > Account Info section	Company Name	Edit Customer page > Customer Details section	
Email	General tab > Primary Contact section	Email Address	Edit Customer page > Customer Details section	
Phone2	General tab > Additional Account Info section	Phone Number	Edit Customer page > Customer Details section	

The first synchronisation

Before you start configuring Automation Schedules to automate the synchronisation process between the commerce platforms and MYOB Advanced, you should first perform a full synchronisation for each entity. Doing this will give you a better understanding of what entities will be synced between the systems, also error messages will surface for you to resolve.

To perform the first sync, go to the Shopify Stores (BC201010) or BigCommerce Stores (BC201000), in the Entity Settings tab, mark all the entities that need to be synced to Active.

Tip: if you select an entity that is dependent on other entities, all of the related Entities will also be marked as Active. For example, when the Shipment entity is set as Active in the Shopify Stores screen, the Customer, Stock Item, Non-Stock Item, Template Item and Sales Order entities are also marked as Active.

Shopify Stores
Shopify ProServeED

Connector: Shopify Active
Store Name: ProServeED Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS ORDER SETTINGS PAYMENT SETTINGS SHIPPING SETTINGS

Active	Entity	Sync Direction	Primary System	Real-Time Import	Real-Time Export	Real-Time Mode	Max. Number of Failed Attempts
<input checked="" type="checkbox"/>	Customer	Bidirectional	External System	Running	Running	Prepare & Process	5
<input type="checkbox"/>	Customer Location	Bidirectional	External System	Running	Running	Prepare & Process	5
<input checked="" type="checkbox"/>	Stock Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Non-Stock Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Template Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input type="checkbox"/>	Product Image	Export	ERP	Not Supported	Not Supported	Prepare	5
<input type="checkbox"/>	Product Availability	Export	ERP	Not Supported	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Sales Order	Import	External System	Stopped	Stopped	Prepare	5
<input type="checkbox"/>	Payment	Import	External System	Not Supported	Not Supported	Prepare	5
<input checked="" type="checkbox"/>	Shipment	Export	ERP	Not Supported	Stopped	Prepare	5
<input type="checkbox"/>	Refund	Import	External System	Stopped	Not Supported	Prepare	5

Next, go to the Prepare Data screen, select the entities that you want to sync between the two systems In the Prepare Mode, select Full, then click Prepare.

Search...

Prepare Data

PREPARE

Store: ProServeED Prepare Mode: Full Start Date: 21/06/2022 12:00 AM
Entity: End Date:

Selected	Store	Entity	Sync Direction	Primary System	Last Error
<input checked="" type="checkbox"/>	ProServeED	Customer	Bidirectional	External System	
<input checked="" type="checkbox"/>	ProServeED	Stock Item	Export	ERP	
<input checked="" type="checkbox"/>	ProServeED	Non-Stock Item	Export	ERP	
<input checked="" type="checkbox"/>	ProServeED	Template Item	Export	ERP	
<input checked="" type="checkbox"/>	ProServeED	Sales Order	Import	External System	
<input checked="" type="checkbox"/>	ProServeED	Payment	Import	External System	
<input checked="" type="checkbox"/>	ProServeED	Shipment	Export	ERP	

Then, go to the Process Data screen, and click Process All to start the importing/exporting of records between the two systems. Since this is the first sync and is also a full sync, the process can take a while.

Process Data

PROGRESS PROCESS ALL

Store: ProServeED
Entity:

		Store	Entity	ERP ID		Last Attempt
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Customer	CUST000001_Jame		27/06/2022 7:27 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Customer	EE000001_Leon2 C		27/06/2022 7:27 AM
>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Sam 32-Inch LED HF		28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Laptop computer mo		28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	intel CPU - 2.6GHz		28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Hard drive 2TB 7200		28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Hard drive 1 TB SSD		28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Hard drive 2TB 7200rpm	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	2D-Magic VGA Card	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Standard Keyboard	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Bluetooth Keyboard	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Kingsbrand Keyboard	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Kingsbrand Bluetooth Keybo...	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Standard Mouse	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Bluetooth Mouse	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Kingsbrand Mouse	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Kingsbrand Bluetooth Mouse	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	KTEC Bluetooth Gaming Mou...	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	KTEC Standard Mouse	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	KTEC Bluetooth Mouse	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	KTEC wired optical Mouse	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Desktop Office Pro Package A	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Desktop Office Pro Package B	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Desktop Editor Pro Package A	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Desktop Editor Pro Package B	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Desktop Education Package A	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Desktop Education Package B	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Desktop Mouse Package 1	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Desktop Mouse Package 2	Prepared	Modified in ERP 28/06/2022 12:26 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ProServeED	Stock Item	Desktop Keyboard Package	Prepared	Modified in ERP 28/06/2022 12:26 AM

Processing

Initializing... 00:00:03 Elapsed

0 Processed | 0 Errors | 0 Warnings | 153 Remaining | 153 Total

CANCEL PROCESSING

Once the sync is completed, you can go to the Sync History to review the sync result. If there's any error message related to the sync, you can also find them here. If you click on a record and press Sync, the system will do a Prepare Data/Process Data only for that record. This is a short cut for resyncing if you have updated some records in one system and would like the change to go through to the other system.

Sync History

Store: ProServeED

Entity: ProServeED

ALL RECORDS READY TO PROCESS FAILED PROCESSED SKIPPED ABORTED DELETED FILTERED INVALID INACTIVE

ID	Entity	Store	ERP ID	External ID	Status	Last Error	Last Operation	Last Attempt	Attempt Count	Active
0	Template Item	ProServeED	T-Shirt	7057261965839	Processed		Inserted Externally	28/06/2022 12:35 f	0	☑
0	Template Item	ProServeED	Summer Dress	7057261953071	Processed		Inserted Externally	28/06/2022 12:35 f	0	☑
0	Non-Stock Item	ProServeED	Travel Expenses	7057261920303	Processed		Inserted Externally	28/06/2022 12:35 f	0	☑
0	Non-Stock Item	ProServeED	Support Hours	7057261987535	Processed		Inserted Externally	28/06/2022 12:35 f	0	☑
0	Non-Stock Item	ProServeED	Subcontracted Labor	7057261854767	Processed		Inserted Externally	28/06/2022 12:35 f	0	☑
0	Non-Stock Item	ProServeED	Support On Boarding Fee	7057261821999	Processed		Inserted Externally	28/06/2022 12:35 f	0	☑
0	Non-Stock Item	ProServeED	Support Man Hours - Fee	7057261789031	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	SAAS Software License	7057261756463	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Route Services	7057261723695	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Repair Services	7057261690927	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Prepaid Office Supplies	7057261658159	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Printer Toner	7057261625391	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Bond Paper A4	7057261592623	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Office Rent	7057261559855	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Network Diagnostics	7057261527087	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Installation Services	7057261494319	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Infrastructure Services	7057261461551	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Hardware Service	7057261428783	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Airconditioning Unit Clean up	7057261396015	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Data Migration Services	7057261363247	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Consulting Senior Consultant	7057261330479	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Consulting - Project Manager	7057261297711	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Non-Stock Item	ProServeED	Consulting - Junior Consultant	7057261254943	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Stock Item	ProServeED	Gray Matter GEN Y Generato	7057261222175	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Stock Item	ProServeED	Gray Matter GEN Y Generato	7057261199497	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Stock Item	ProServeED	Gray Matter GEN Y Generato	7057261166639	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Stock Item	ProServeED	Gray Matter GEN Y Generato	7057261133871	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑
0	Stock Item	ProServeED	Gray Matter GEN X Generato	7057261101503	Processed		Inserted Externally	28/06/2022 12:34 f	0	☑

Automated synchronisation and Real-Time sync

The synchronisation between the systems can be automated. In both the Prepare Data screen and Process Data screen, you can add Automation Schedules to automate the syncing.

Prepare Data

Store: ProServeED

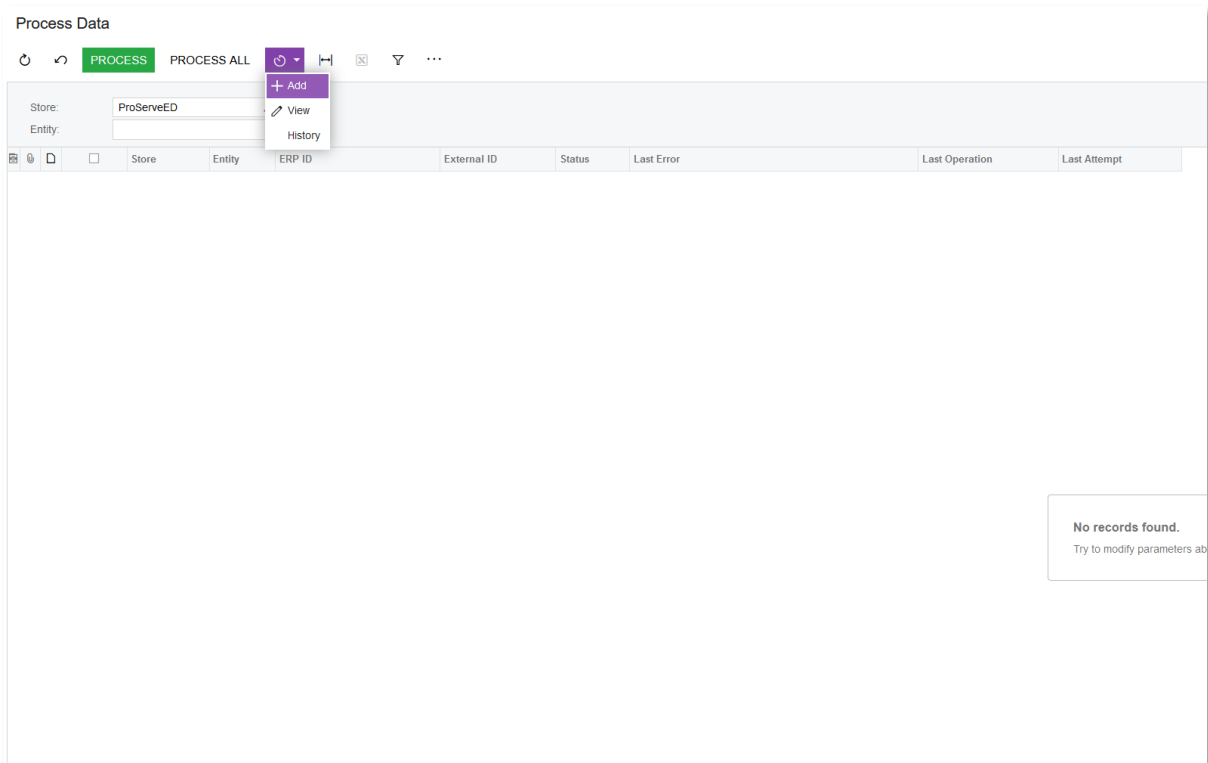
Entity: ProServeED

Prepare Mode: Full

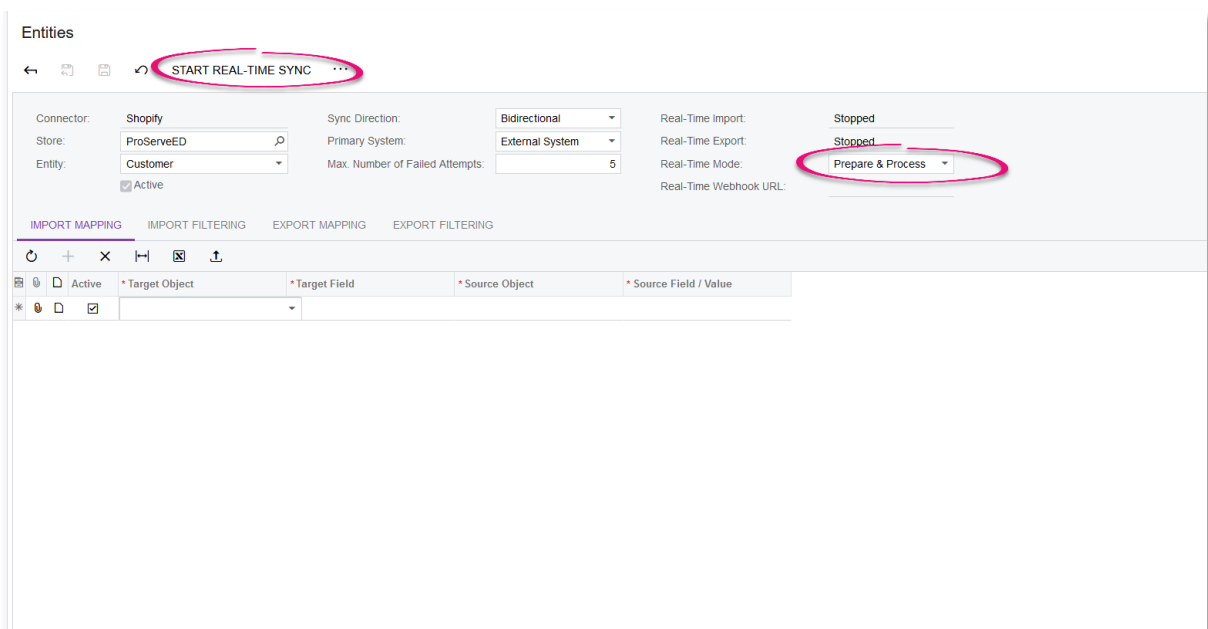
Start Date: 21/06/2022 12:00 AM

End Date:

ID	Selected	Store	Entity	Sync Direction	Primary System	Last Error
0	<input type="checkbox"/>	ProServeED	Customer	Bidirectional	External System	
0	<input type="checkbox"/>	ProServeED	Stock Item	Export	ERP	
0	<input type="checkbox"/>	ProServeED	Non-Stock Item	Export	ERP	
0	<input type="checkbox"/>	ProServeED	Template Item	Export	ERP	
0	<input type="checkbox"/>	ProServeED	Sales Order	Import	External System	
0	<input type="checkbox"/>	ProServeED	Payment	Import	External System	
0	<input type="checkbox"/>	ProServeED	Shipment	Export	ERP	



Alternatively, you can turn on Real-Time Sync for entities that require instant synchronisation whenever there's an update on either system. To start a Real-Time Sync, go to the Entities screen, select the entity you would like to turn on the Real-Time Sync for, select the appropriate Real-Time mode and select Start Real-Time Sync:



During Real-Time Sync, the system will monitor entities in both systems. Whenever there's a change in the record, the system will trigger the Real-Time Mode (Prepare or Prepare and Process). For Real-Time Sync to work, you should first establish a synchronisation of records between the two systems, the records should have already been imported or exported during the

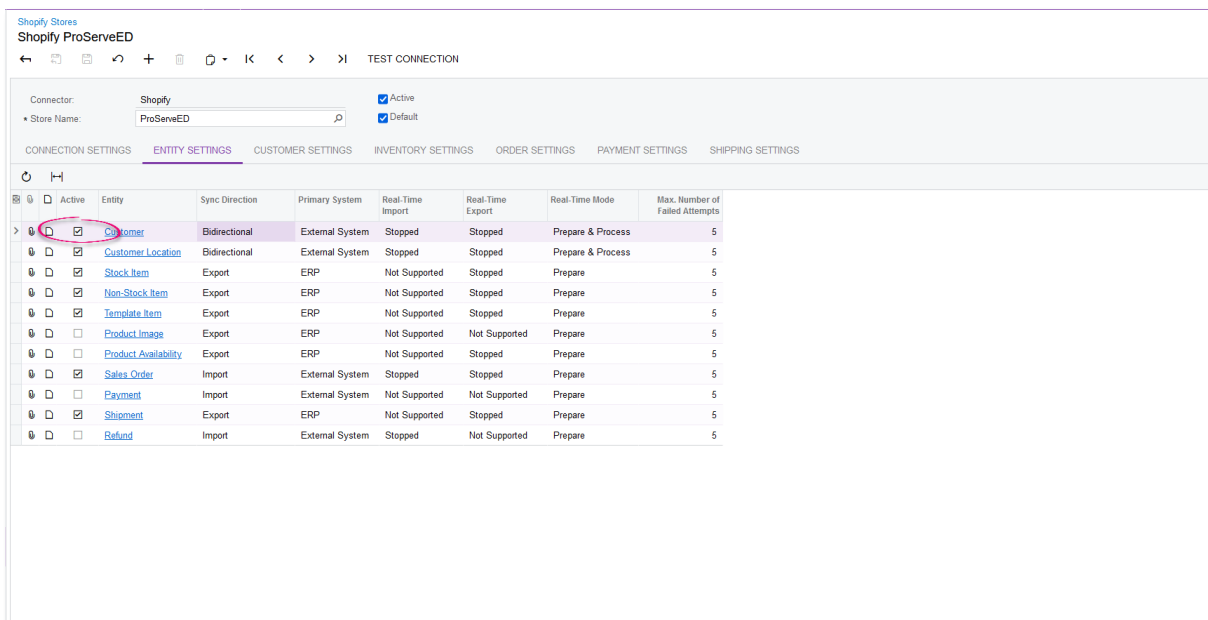
first full synchronisation. Any subsequent changes of records will be tracked by the Real-Time Sync.

Not all type of entities can have Real-Time Sync on. For example, you cannot turn on Real-Time Sync for Product Images, Payments and Refunds etc. Turning on Real-Time Sync for many entities may cause performance degradation, so you should only turn on Real-Time Sync where necessary. For example, you can turn on Real-Time Sync for Customers, Orders and Shipments, but you can leave the syncing of Stock Item, Non-Stock Item, etc. on an automation schedule if updating these records instantly whenever there's a change is not required.

Synchronising Customers and Customer Locations

Synchronising Customers

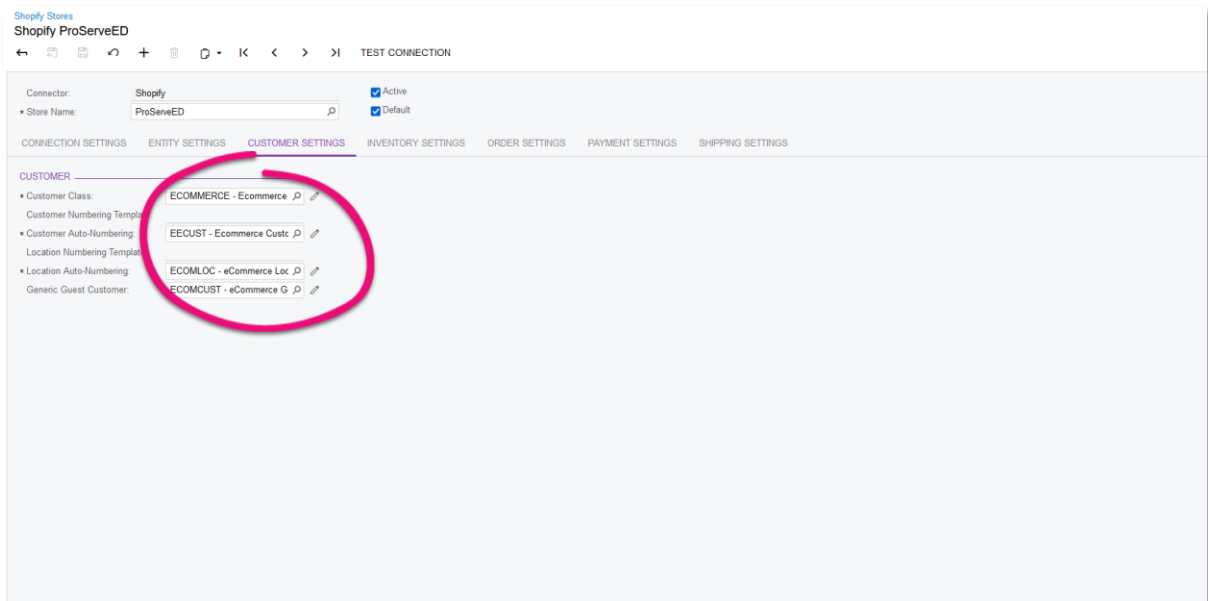
To synchronise Customers and Customer Locations between the two systems, you need to mark the Customer entity as Active in Entity Settings tab of the Shopify Stores screen (BC201010) or BigCommerce Stores screen (BC201000).



The screenshot shows the 'Shopify Stores' configuration interface for 'ProServeED'. The 'ENTITY SETTINGS' tab is active, displaying a table of entities. The 'Customer' entity is highlighted with a red circle. The table columns include: Active, Entity, Sync Direction, Primary System, Real-Time Import, Real-Time Export, Real-Time Mode, and Max. Number of Failed Attempts.

Active	Entity	Sync Direction	Primary System	Real-Time Import	Real-Time Export	Real-Time Mode	Max. Number of Failed Attempts
<input checked="" type="checkbox"/>	Customer	Bidirectional	External System	Stopped	Stopped	Prepare & Process	5
<input checked="" type="checkbox"/>	Customer Location	Bidirectional	External System	Stopped	Stopped	Prepare & Process	5
<input checked="" type="checkbox"/>	Stock Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Non-Stock Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Template Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input type="checkbox"/>	Product Image	Export	ERP	Not Supported	Not Supported	Prepare	5
<input type="checkbox"/>	Product Availability	Export	ERP	Not Supported	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Sales Order	Import	External System	Stopped	Stopped	Prepare	5
<input type="checkbox"/>	Payment	Import	External System	Not Supported	Not Supported	Prepare	5
<input checked="" type="checkbox"/>	Shipment	Export	ERP	Not Supported	Stopped	Prepare	5
<input type="checkbox"/>	Refund	Import	External System	Stopped	Not Supported	Prepare	5

When you set the Customer Entity as active, there are a few required items that you need to set up on the Customer Settings tab. This include the Customer Class, the Customer Numbering Sequence and Locations Numbering Sequence for your eCommerce Orders.



After that, you can perform the sync through the Prepare Data, Process Data screen. To review the sync result, you can go to the Sync History screen. If there is any issue during the sync, the error messages will show here, and you can resolve them accordingly. After you've resolved the errors, you can directly perform a re-sync through this screen.

Sync History

Store: ProServeED
Entity: Customer

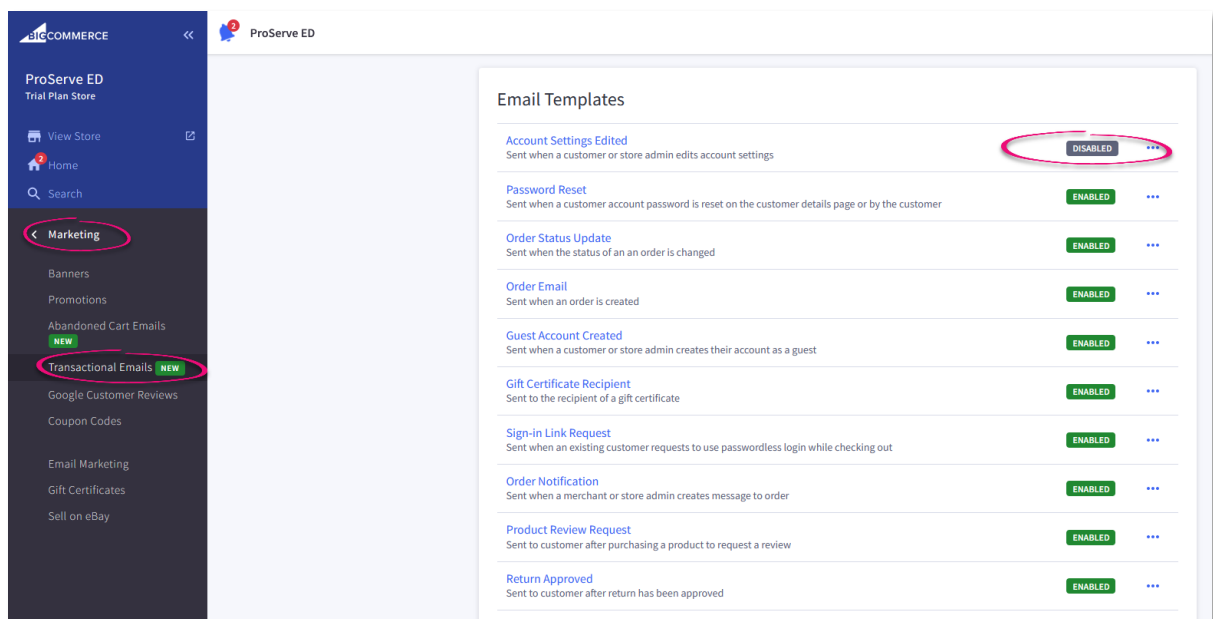
ALL RECORDS READY TO PROCESS FAILED PROCESSED SKIPPED ABORTED DELETED FILTERED INVALID INACTIVE DRILLDOWN

ID	Entity	Store	ERP ID	External ID	Status	Last Error	Last Operation	Last Attempt	Attempt Count	Active
1	Customer	ProServeED	CUST000050_Martin Office B...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
2	Customer	ProServeED	CUST000051_Microshop Res...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
3	Customer	ProServeED	CUST000052_Midwood Amb...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
4	Customer	ProServeED	CUST000053_SPC Machines		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
5	Customer	ProServeED	CUST000054_MUSO Central		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
6	Customer	ProServeED	CUST000055_Naapoo Associ...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
7	Customer	ProServeED	CUST000056_NEP Persons		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
8	Customer	ProServeED	CUST000057_NCTCAFF NY		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
9	Customer	ProServeED	CUST000058_NPC Call Center		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
10	Customer	ProServeED	CUST000059_NPL Farmers		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
11	Customer	ProServeED	CUST000060_Data Recovery...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
12	Customer	ProServeED	CUST000061_Glog Consulting		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
13	Customer	ProServeED	CUST000062_New Youth Care		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
14	Customer	ProServeED	CUST000063_AKS Industries		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
15	Customer	ProServeED	CUST000064_Office Depot		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
16	Customer	ProServeED	CUST000065_Philis Photogra...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:19 AM	2	<input checked="" type="checkbox"/>
17	Customer	ProServeED	CUST000066_Precision Photos		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
18	Customer	ProServeED	CUST000067_Chemere Der...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
19	Customer	ProServeED	CUST000068_Real Estate In...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
20	Customer	ProServeED	CUST000069_Rich Vision		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
21	Customer	ProServeED	CUST000070_Road Builder...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
22	Customer	ProServeED	CUST000071_Safe Credit Un...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
23	Customer	ProServeED	CUST000072_Shore Mortgage		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
24	Customer	ProServeED	CUST000073_Silver Springs...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
25	Customer	ProServeED	CUST000074_Postmation Int...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
26	Customer	ProServeED	CUST000075_Sherstee Sports		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
27	Customer	ProServeED	CUST000076_SPORTS.CEN...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
28	Customer	ProServeED	CUST000077_Sloanergr Inc...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
29	Customer	ProServeED	CUST000078_O'Neil's Trading		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
30	Customer	ProServeED	CUST000079_Star America I...		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>
31	Customer	ProServeED	CUST000080_Unforce Staff		Failed	Email or Phone is a required field in Shopify. Please provide Email or Phone i...	Failed to Save Externally	28/06/2022 2:18 AM	2	<input checked="" type="checkbox"/>

During the synchronisation of the Customer entity (for both the Export direction and the Import direction), a customer record in the source system is merged with an existing customer record in the target system if both records have the same email address or the same phone number (if there is no email address).

Note: If you are planning to export customer records from MYOB Advanced to the BigCommerce store, we recommend that you turn off sending email notifications about changes to customer accounts in the BigCommerce store. If such notifications are turned on and customers are configured to be exported or to be synchronised in both directions (that is, to be exported and imported), a customer will be sent an email every time the e-commerce connector synchronises the customer data, which may look to the customer as if their store account has been hacked.

You manage sending notifications to customers on the Transactional emails page, which you open by clicking Marketing > Transactional Emails in the left menu of the control panel. To disable notifications about changes in the customer account, you click the button in the rightmost column in the row of the Account Settings Edited template, and in the menu that opens, you click Disable.

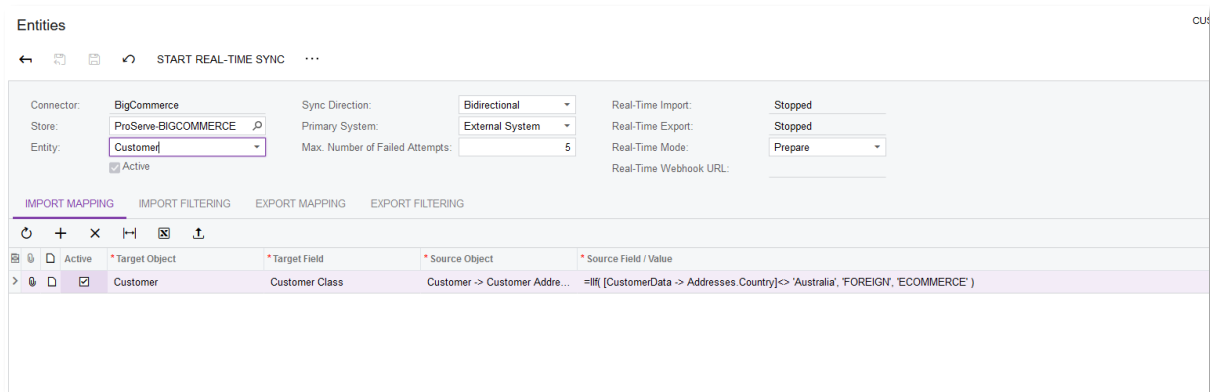


Synchronising Customer Locations

The Customer Location entity is closely related to the Customer entity. Therefore, whenever you perform a sync or resync for the Customer entity, the Customer Location entities are also synced.

Utilising formulas in Field Mappings for Customers

Suppose you have different customer classes, for example, local customers and overseas customers. These customer classes can have different settings (especially Tax Zone, so that the Sales Orders can contain the correct Tax), you can utilize the formulas on the Import Mappings of the Customer Entities like the below example, to pick the correct Customer Class for the customer record when they are imported from the store to MYOB Advanced:



Sync direction, Mapping, Filtering and Primary system

From this section onward, this guide will not mention the Sync Direction, Mapping, Filtering or Primary System of each Entity. You can use the default values, or you can make change if required, depending on the requirements of the customer.

Synchronising Inventory and Product Images

Synchronising Sales Category – Prerequisite for synchronizing Products for BigCommerce

For BigCommerce, before you're able to sync Stock Items, Non-Stock Items, you need to create Sales Categories and add items into Sales Categories. These Sales Categories are pre-requisite and must be created before syncing. If an Inventory ID does not have any Sales Category, they will not sync.

To create Sales Categories, go to the screen Item Sales Categories (IN204060) in MYOB Advanced. Add Sales Categories and items into those categories.

You can use the Add Items button to quickly add all items, or all items from an item class to the screen.

Item Sales Categories

Categories

- ↑ ↓ + 🗑️
- COMMERCE
 - Stock Items
 - Non-stock Items

* Description: Parent Category:

Category Members

🔄 + ✖️ 🗑️ 🔍 📄 ADD ITEMS |←|

<input type="checkbox"/>	Inventory ID	Description	Item Class	Item Status
<input type="checkbox"/>	ITM0000001	Standard Keyboard	ACCSR-KYBRD	Active
<input type="checkbox"/>	ITM0000002	Bluetooth Keyboard	ACCSR-KYBRD	Active
<input checked="" type="checkbox"/>	ITM0000003	Kingsbrand Keyboard	ACCSR-KYBRD	Active
<input type="checkbox"/>	ITM0000004	Kingsbrand Bluetooth Keyboard	ACCSR-KYBRD	Active
<input type="checkbox"/>	ITM0000005	Standard Mouse	ACCSR-MICE	Active
<input type="checkbox"/>	ITM0000006	Bluetooth Mouse	ACCSR-MICE	Active
<input type="checkbox"/>	ITM0000007	Kingsbrand Mouse	ACCSR-MICE	Active
<input type="checkbox"/>	ITM0000008	Kingsbrand Bluetooth Mouse	ACCSR-MICE	Active
<input type="checkbox"/>	ITM0000009	KTEC Bluetooth Gaming Mo...	ACCSR-MICE	Active
<input type="checkbox"/>	ITM0000010	KTEC Standard Mouse	ACCSR-MICE	Active
<input type="checkbox"/>	ITM0000011	KTEC Bluetooth Mouse	ACCSR-MICE	Active
<input type="checkbox"/>	ITM0000012	KTEC wired optical Mouse	ACCSR-MICE	Active
<input type="checkbox"/>	ITM0000032	AceKing i7 8gb 128 SSD Lap...	LAPTP-	Active
<input type="checkbox"/>	ITM0000033	AceKing i7 16gb 256 SSD La...	LAPTP-	Active
<input type="checkbox"/>	ITM0000034	AceKing i7 16gb 512 SSD La...	LAPTP-	Active
<input type="checkbox"/>	ITM0000035	KnightsCross i7 8 gb 128 SS...	LAPTP-	Active
<input type="checkbox"/>	ITM0000036	KnightsCross i7 16 gb 256 S...	LAPTP-	Active
<input type="checkbox"/>	ITM0000037	KnightsCross i7 16 gb 512 S...	LAPTP-	Active
<input type="checkbox"/>	ITM0000038	AceKing i5 8gn 128 HDD Lap...	LAPTP-	Active
<input type="checkbox"/>	ITM0000039	AceKing i5 8gn 256 HDD Lap...	LAPTP-	Active

On the BigCommerce Store (BC201000) screen, enable the syncing of the Sales Category entity in the Entities tab

BigCommerce Stores

BigCommerce ProServe-BIGCOMMERCE

← 🗑️ 🔄 + 🗑️ 📄 🔍 TEST CONNECTION

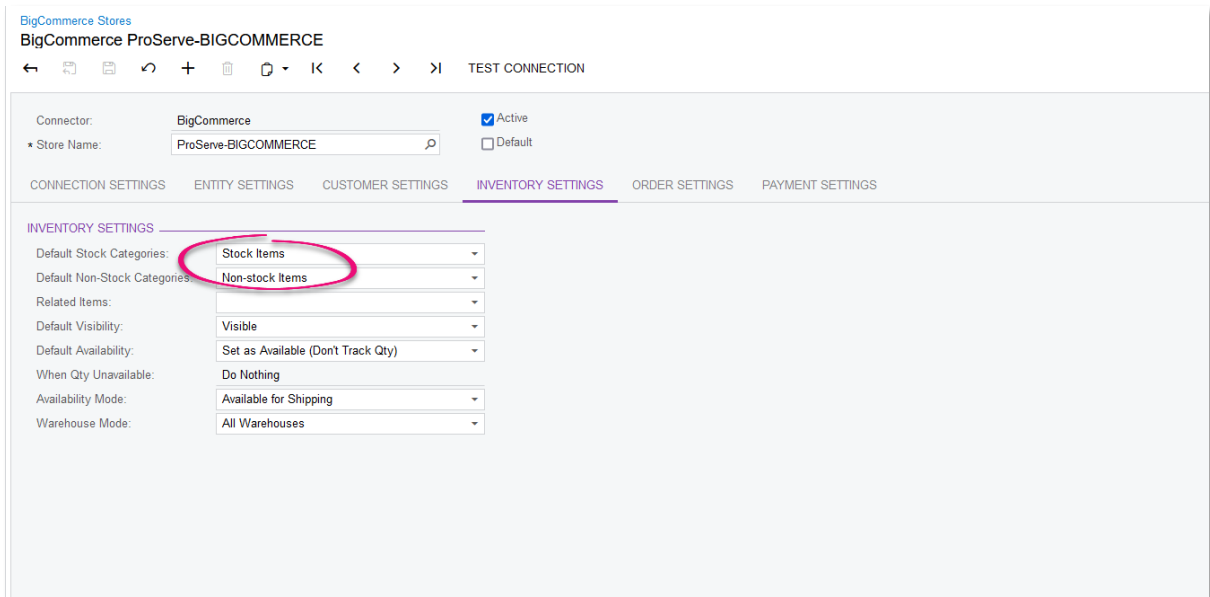
Connector: Active
 * Store Name: Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS ORDER SETTINGS PAYMENT SETTINGS

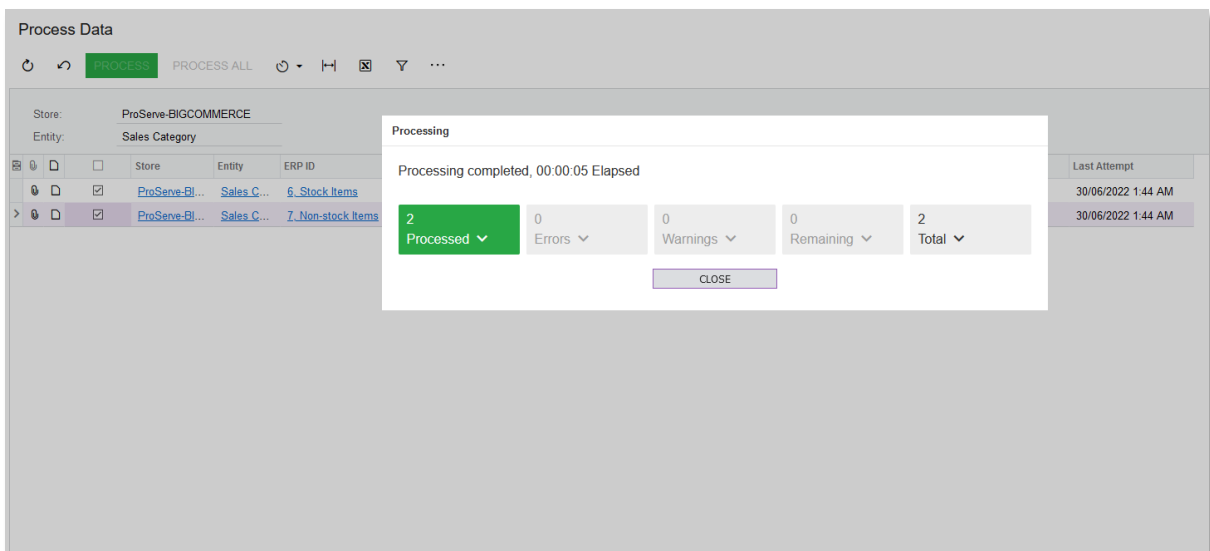
🔄 |←|

<input type="checkbox"/>	<input type="checkbox"/>	Active	Entity	Sync Direction	Primary System	Real-Time Import	Real-Time Export	Real-Time Mode	Max. Number of Failed Attempts
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Price Class	Export	ERP	Not Supported	Stopped	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer	Bidirectional	External System	Stopped	Stopped	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Location	Bidirectional	External System	Stopped	Stopped	Prepare	5
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sales Category	Export	ERP	Stopped	Stopped	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stock Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Non-Stock Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Template Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Base Sales Price	Export	ERP	Not Supported	Not Supported	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Price List	Export	ERP	Not Supported	Not Supported	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Product Image	Export	ERP	Not Supported	Not Supported	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Product Availability	Export	ERP	Not Supported	Stopped	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sales Order	Import	External System	Stopped	Stopped	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Payment	Import	External System	Not Supported	Not Supported	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Shipment	Export	ERP	Not Supported	Stopped	Prepare	5
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Refund	Import	External System	Not Supported	Not Supported	Prepare	5

In the Inventory Settings tab, specify the Default Stock Categories and Default Non-Stock Categories:



Prepare Data and Process Data for the Sales Category entity:



In the BigCommerce Store, the Sales Categories become Product Categories:

Synchronising Inventory

Before you synchronise Inventory, you need to check the default options of Inventory on the Shopify Stores (BC201010) or BigCommerce Stores (BC201000) screen. You can make change if required.

BigCommerce Stores
BigCommerce ProServe-BIGCOMMERCE

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Connector: **BigCommerce** Active
 * Store Name: Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS **INVENTORY SETTINGS** ORDER SETTINGS PAYMENT SETTINGS

INVENTORY SETTINGS

Default Stock Categories:

Default Non-Stock Categories:

Related Items:

Default Visibility:

Default Availability:

When Qty Unavailable:

Availability Mode:

Warehouse Mode:

Shopify Stores
Shopify ProServeED

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Connector: **Shopify** Active
 * Store Name: Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS **INVENTORY SETTINGS** ORDER SETTINGS PAYMENT SETTINGS SHIPPING SETTINGS

INVENTORY SETTINGS

Sales Category Export:

Default Visibility:

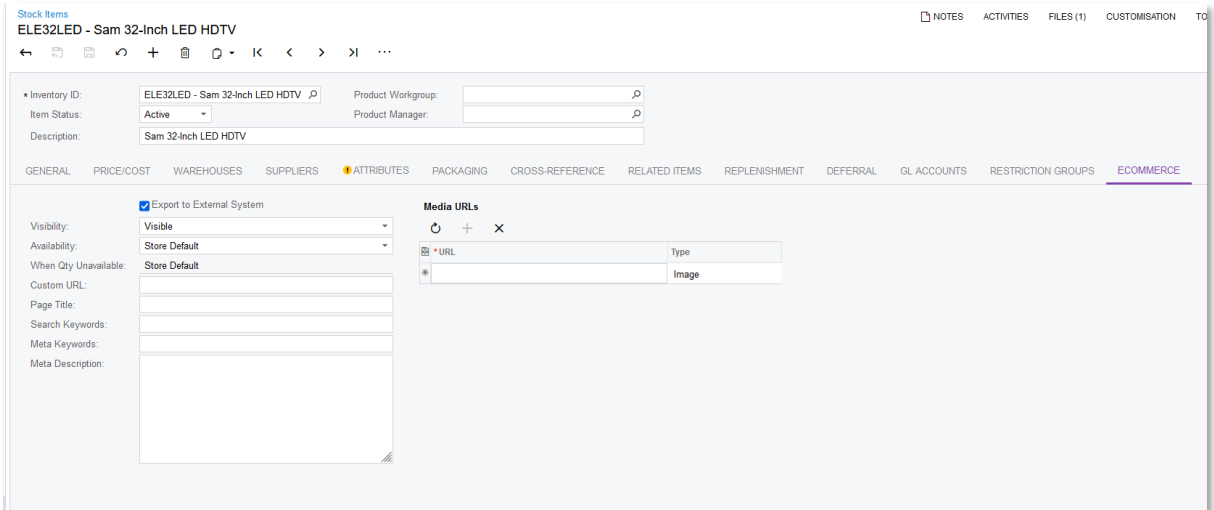
Default Availability:

When Qty Unavailable:

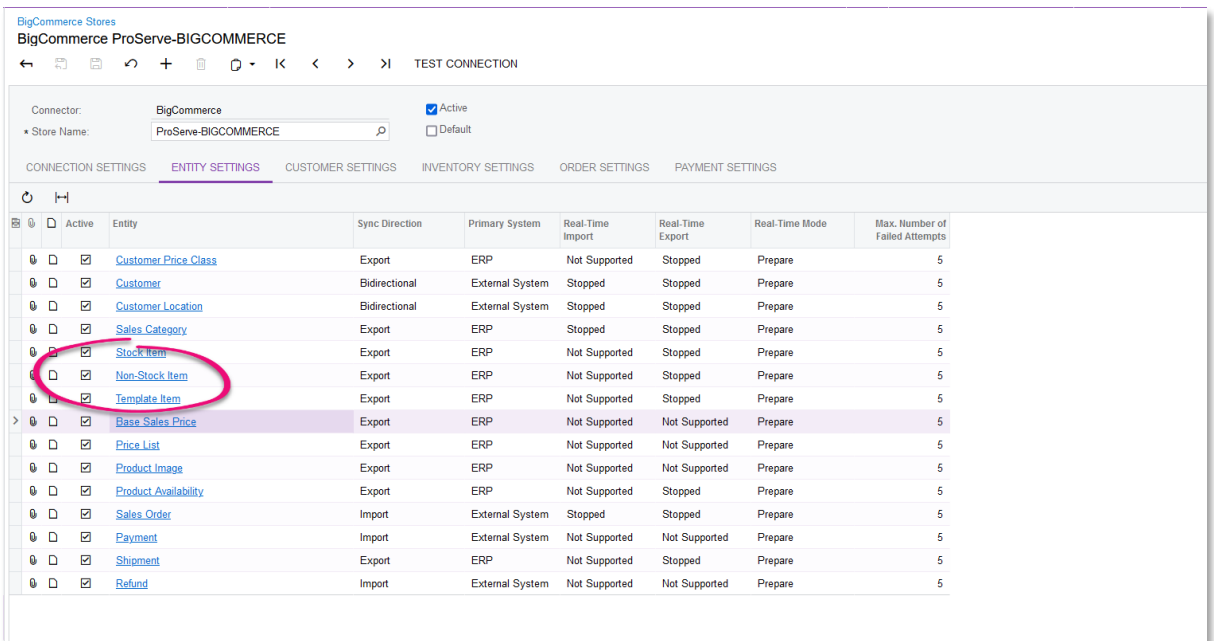
Availability Mode:

Warehouse Mode:

If required, you can override the default values above for a specific Stock Item or Non-Stock Item from the eCommerce tab of the Stock Items screen or Non-stock Items screen:



On the Entity Settings tab of each store, set the Stock Items, Non-Stock Items, Template Item to active.



Shopify Stores
Shopify ProServeED

Connector: Shopify Active
 * Store Name: ProServeED Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS ORDER SETTINGS PAYMENT SETTINGS SHIPPING SETTINGS

Active	Entity	Sync Direction	Primary System	Real-Time Import	Real-Time Export	Real-Time Mode	Max. Number of Failed Attempts
<input checked="" type="checkbox"/>	Customer	Bidirectional	External System	Running	Running	Prepare & Process	5
<input checked="" type="checkbox"/>	Customer Location	Bidirectional	External System	Running	Running	Prepare & Process	5
<input checked="" type="checkbox"/>	Stock Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Non-Stock Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Template Item	Export	ERP	Not Supported	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Product Image	Export	ERP	Not Supported	Not Supported	Prepare	5
<input checked="" type="checkbox"/>	Product Availability	Export	ERP	Not Supported	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Sales Order	Import	External System	Running	Stopped	Prepare	5
<input checked="" type="checkbox"/>	Payment	Import	External System	Not Supported	Not Supported	Prepare	5
<input checked="" type="checkbox"/>	Shipment	Export	ERP	Not Supported	Running	Prepare	5
<input checked="" type="checkbox"/>	Refund	Import	External System	Stopped	Not Supported	Prepare	5

Prepare Data and Process Data to sync Inventory between the systems.

You can use the Sync History screen to review the synchronisation result, and resolve any error if required:

Sync History

Store: ProServeED
Entity: ProServeED

ALL RECORDS **READY TO PROCESS** FAILED PROCESSED SKIPPED ABORTED DELETED FILTERED INVALID INACTIVE

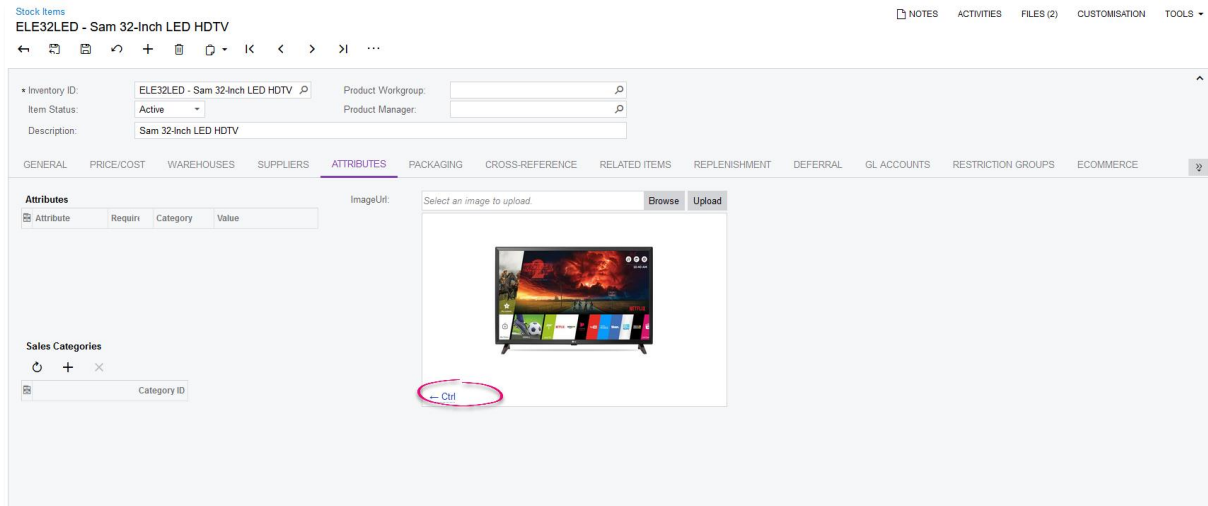
Entity	Store	ERP ID	External ID	Status	Last Error
Non-Stock Item	ProServeED	SAAS Software License	7057261756463	Prepared	
Non-Stock Item	ProServeED	Printer Toner	7057261625391	Prepared	
Non-Stock Item	ProServeED	Bond Paper A4	7057261592623	Prepared	
Non-Stock Item	ProServeED	Installation Services	7057261494319	Prepared	
Non-Stock Item	ProServeED	Infrastructure Services	7057261461551	Prepared	
Non-Stock Item	ProServeED	Hardware Service	7057261428793	Prepared	
Non-Stock Item	ProServeED	Gift Wrapping		Prepared	
Non-Stock Item	ProServeED	Airconditioning Unit Clean up	7057261396015	Prepared	
Non-Stock Item	ProServeED	Data Migration Services	7057261363247	Prepared	
Non-Stock Item	ProServeED	Consulting Senior Consultant	7057261330479	Prepared	
Non-Stock Item	ProServeED	Consulting - Project Manager	7057261297711	Prepared	
Non-Stock Item	ProServeED	Consulting - Junior Consultant	7057261264943	Prepared	
Stock Item	ProServeED	YZ Laptop 4gb 1TB HDD	7057260511279	Prepared	
Stock Item	ProServeED	YZ Laptop 4gb 512 HDD	7057260478511	Prepared	
Stock Item	ProServeED	YZ Laptop 4gb 256 HDD	7057260445743	Prepared	
Stock Item	ProServeED	YZ Laptop 4gb 128 HDD	7057260412875	Prepared	
Stock Item	ProServeED	EZ Laptop 4gb 1TB HDD	7057260281903	Prepared	
Stock Item	ProServeED	EZ Laptop 4gb 512 HDD	7057260249135	Prepared	
Stock Item	ProServeED	EZ Laptop 4gb 256 HDD	7057260216387	Prepared	

During the export of stock items from MYOB Advanced, a stock item is merged with an existing product in BigCommerce if at least one of the following conditions is met:

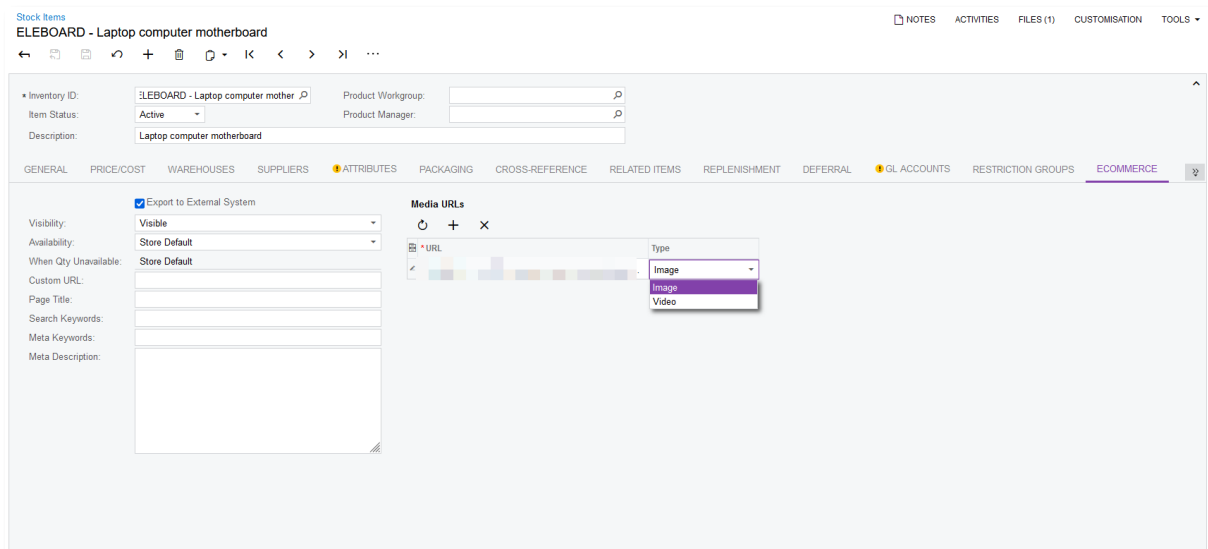
- The stock item's description in MYOB Advanced—that is, the value in the Description box on the Stock Items (IN202500) form—matches the Product Name of the product in BigCommerce.
- The stock item's ID in MYOB Advanced—that is, the value in the Inventory ID box on the Stock Items form—matches the SKU of the product in BigCommerce.

Synchronising Product Images

There are two ways to store and sync Product Images for inventory. The first method, is storing the image on the Stock Items screen or the Non-Stock Items screen as a file, which you can see through the Attributes screen. If you have multiple images for one item, you can attach multiple image files to the stock items screen, and use the **Ctrl** icon to change to which one will be the default image of this item. The default image in MYOB Advanced also becomes the default image or thumbnail image when exported to Shopify or BigCommerce.



The second method is to store images on a server, like an AmazonS3 bucket, and copy and paste the URL of the image to the Media URL field on the eCommerce tab of the Stock Items or Non-stock Items screen. Make sure the URL is public and accessible. You can specify whether a URL is an Image or a Youtube Video:



Videos are not supported in the Shopify connector. Shopify's REST API does not accept YouTube and Vimeo URLs.

There is a difference when choosing which Entity to sync Product Images:

- If you use the first method to store images, which is to drag and drop image files directly on the Stock Items screen, then these images can only be synched through the “Product Image” entity:

	<input type="checkbox"/>	Selected	Store	Entity	Sync Direction	Primary System	Last Error
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Customer Price Class	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Customer	Bidirectional	External System	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Sales Category	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Stock Item	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Non-Stock Item	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Template Item	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Base Sales Price	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Price List	Export	ERP	
>	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Product Image	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Product Availability	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Sales Order	Import	External System	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Payment	Import	External System	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Shipment	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Refund	Import	External System	

- If you use the second method, which is to store images as Media URLs, then these images can only be synched through the Stock Item/Non-Stock Item/Template Item entity:

	<input type="checkbox"/>	Selected	Store	Entity	Sync Direction	Primary System	Last Error
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Customer Price Class	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Customer	Bidirectional	External System	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Sales Category	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Stock Item	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Non-Stock Item	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Template Item	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Base Sales Price	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Price List	Export	ERP	
>	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Product Image	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Product Availability	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Sales Order	Import	External System	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Payment	Import	External System	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Shipment	Export	ERP	
	<input type="checkbox"/>		ProServe-BIGCOMMERCE	Refund	Import	External System	

Prepare and Process Data for the relevant entities to finish the synchronisation of Product Images.

Inventory Settings

On the BigCommerce Stores screen (BC201000) and in the Shopify Stores screen (BC201010), you can specify default Inventory Settings on the Inventory Settings tab.

BigCommerce Stores
BigCommerce ProServe-BIGCOMMERCE

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Connector: BigCommerce Active
 * Store Name: ProServe-BIGCOMMERCE Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS **INVENTORY SETTINGS** ORDER SETTINGS PAYMENT SETTINGS

INVENTORY SETTINGS

Default Stock Categories: Stock Items

Default Non-Stock Categories: Non-stock Items

Related Items:

Default Visibility: Visible

Default Availability: Set as Available (Don't Track Qty)

When Qty Unavailable: Do Nothing

Availability Mode: Available for Shipping

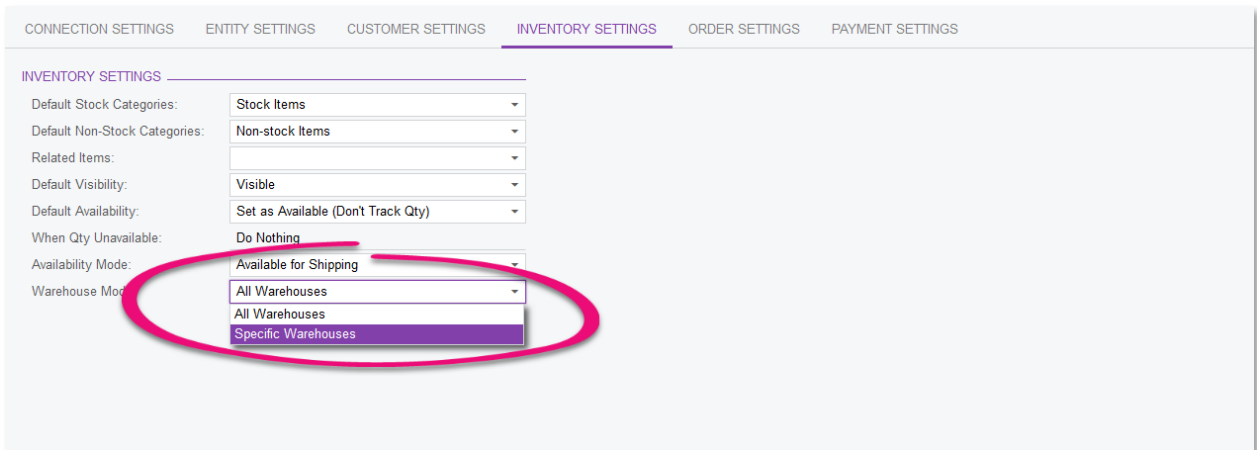
Warehouse Mode: All Warehouses

These settings define the behavior of the stock items or non-stock items after they are exported to the storefront. For example, when Default Visibility is set to Visible, when an item is exported, it'll be visible on the storefront. When set to Featured, the stock item becomes a featured product on the front page of the store. You can also set the Availability Mode, which will export the qty available of the product based on the Availability Calculation Rule; there are three options: Available, Available for Shipping and On Hand, etc.e

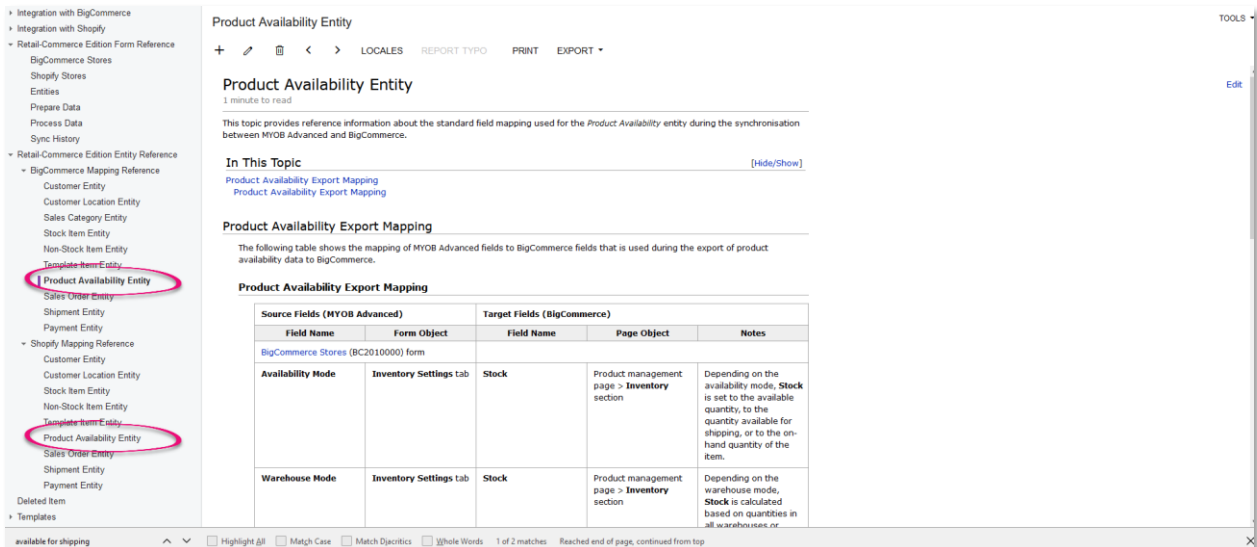
Refer to the in-product User Guide for full explanation of each setting.

Synchronising product availability

Product Availability can only be exported from MYOB Advanced to the stores, and you can configure Real-Time Sync for product availability. Product Availability obeys the Availability Calculation Rule specified for the Item Class, and you can specify whether MYOB Advanced should export the Available qty, Available for Shipping qty, or On Hand qty through the BigCommerce Store screen or through the Shopify Store screen, in the Inventory Settings tab. You can also specify whether the Available qty should be taken for all Warehouse, or only for a specific Warehouse and Warehouse Location.



Depending the value of the Default Availability field on the BigCommerce Store and Shopify Store, or the value of the Availability field in the eCommerce store on the Stock Items tab, the behavior of the products in the stores will be different. For further information on this, refer to the in-product user guide, section Product Availability Entity.



The Product Availability once synced to the store will be shown as the available quantity for the Stock Item:

Inventory Export Import

All 168 Cre

Search inventory Filter

Product	SKU	Incoming	Committed	Available
2D-Magic VGA Card	ELEVGA	0	2	5
AceKing 18.5inch Amoled Monitor	ITM0000045	0	1	361
AceKing 18.5inch LED Monitor	ITM0000056	0	0	300
AceKing 22inch Amoled Monitor	ITM0000046	0	1	34
AceKing 22inch LED Monitor	ITM0000057	0	0	0
AceKing 32inch Amoled Monitor	ITM0000047	0	0	39
AceKing 32inch LED Monitor	ITM0000058	0	0	0
AceKing i5 8gn 128 HDD Laptop	ITM0000038	0	0	882
AceKing i5 8gn 256 HDD Laptop	ITM0000039	0	0	565
AceKing i7 16gb 256 SSD Laptop	ITM0000033	0	0	2057
AceKing i7 16gb 512 SSD Laptop	ITM0000034	0	0	1831

Inventory Summary CUSTOMISATION TOOLS

Inventory ID: ITM0000045 - AceKing 18.5in Warehouse: Location:
 Expand by Lot/Serial Number

Warehouse	Location	Available	Available for Shipment	SO Booked	SO Allocated	SO Shipped	SO Back Ordered	Production Supply Prepared	Production Supply	Production for Prod. Prepared	Production for Production	Purchase for Prod. Prepared	Purchase for Production	Production for SO Prepared	Production for SO	Production Dest Prep
MAIN	<UNASSI...	-2.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
> MAIN	RECEIVING	361.00	361.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total:		359.00	361.00	2.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Synchronising Sales Orders

Order Settings

Before synchronizing orders, we need to do the necessary settings for the Orders Entities. On the Shopify Stores screen or the BigCommerce Stores screen, set up the default values to support the synchronisation. Below are some important settings for each type of store:

For Shopify Stores:

Shopify Stores
Shopify ProServeED

Connector: Shopify Active
 * Store Name: ProServeED Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS **ORDER SETTINGS** PAYMENT SETTINGS SHIPPING SETTINGS

GENERAL

* Branch: RBYTEMAIN - Rapid Byte He

ORDER

* Order Type for Import: EE - Ecommerce Order Type
 * Return Order Type: RC - Return for Credit
 * Refund Amount Item: REFUND - Refund
 Refund Reason Code: ISSUE - Issue
 Order Time Zone: (GMT+10:00) Canberra, Mel...
 Show Discounts In: Document Discount
 Import Order Risks
 Hold on Risk Status: High Risk
 Gift Certificate Item: GIFTCERTIFICATE - Gift Cert
 Earliest Order Date:
 Tag Ext. Order with ERP Order Nbr.

TAXES

Tax Synchronization
 Default Tax Zone:
 Use as Primary Tax Zone

SUBSTITUTION LISTS

* Tax List: SPCTAXCODES
 * Tax Category List: SPCTAXCLASSES

- Branch: The default branch for the Sales Orders when they're imported from Shopify
- Order Type for import: The Order Type to be used when the orders are imported from Shopify
- Return Order Type: The Sales Order Type that will be used for customer returns
- Refund Amount Item: A non-stock item that represents the amount to refund to the customer.
- Gift Certificate Item: a non-stock item to be used as a Gift Certificate/Gift Card. Customer can purchase this item on Shopify. They use the Gift Card as a payment method.
- Tag Ext. Order with ERP Order Nbr – when ticked: the Sales Order number in MYOB Advanced will be tagged to the Shopify Order, like this:


<input type="checkbox"/>	#1009	Today at 4:23 pm	Bay City Traders	\$605.00	<input checked="" type="radio"/> Paid	<input checked="" type="radio"/> Unfulfilled	1 item	Standard	E000000009	ERP
<input type="checkbox"/>	#1008	Today at 3:35 pm	Bay City Traders	\$192.85	<input checked="" type="radio"/> Paid	<input checked="" type="radio"/> Fulfilled	2 items	Standard	E000000008	ERP
<input type="checkbox"/>	#1007	Today at 2:50 pm	Bay City Traders	\$107.43	<input checked="" type="radio"/> Paid	<input checked="" type="radio"/> Fulfilled	1 item	Standard	E000000007	ERP
<input type="checkbox"/>	#1006	Today at 2:49 pm	Bay City Traders	\$87.99	<input checked="" type="radio"/> Paid	<input checked="" type="radio"/> Unfulfilled	1 item	Standard	E000000006	ERP
<input type="checkbox"/>	#1005	Today at 2:27 pm	Leon002 Chau	\$102.66	<input checked="" type="radio"/> Paid	<input checked="" type="radio"/> Fulfilled	1 item	Express	E000000005	ERP

- Tax Synchronisation: When ticked: The Tax ID from Shopify will be synced to myob Advanced. The default Sales Tax ID in Shopify for Australia is "GST":

← #1009 Paid Unfulfilled Refu

1 July 2022 at 4:23 pm from Draft Orders

Unfulfilled (1)

 **AceKing 22inch Amoled Monitor** \$550.00 × 1 \$550.00
SKU: ITM0000046

Fulfill item Create shipping label

Paid

Subtotal	1 item	\$550.00
Shipping	Standard (1.0 kg)	\$0.00
Tax	GST 10%	\$55.00
Total		\$605.00
Paid by customer		\$605.00

- You should ensure that the GST Tax ID also exists in MYOB Advanced. Alternatively, in the Substitution List section, in the Tax List substitution list, you should create a mapping for the GST Tax ID to the Tax ID in MYOB Advanced, like this:

Shopify Stores
Shopify ProServeED

Connector: Shopify Active
Store Name: ProServeED Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS **ORDER SETTINGS** PAYMENT SETTINGS SHIPPING SETTINGS

GENERAL

Branch: RBYTEMAIN - Rapid Byte He

ORDER

Order Type for Import: EE - E-commerce Order Type
Return Order Type: RC - Return for Credit
Refund Amount Item: REFUND - Refund
Refund Reason Code: ISSUE - Issue
Order Time Zone: (GMT+10:00) Canberra, Mel...
Show Discounts In: Document Discount
 Import Order Risks
Hold on Risk Status: High Risk
Gift Certificate Item: GIFTCERTIFICATE - Gift Cert
Earliest Order Date:
 Tag Ext. Order with ERP Order Nbr.

TAXES

Tax Synchronization
Default Tax Zone: DOMESTIC - Domestic
 Use as Primary Tax Zone

SUBSTITUTION LISTS

Tax List: **SPECTAXCODES**
Tax Category List: SPECTAXCLASSES

Substitution Lists

Substitution List: **SPECTAXCODES**
Table Name:
Field Name:
Original Value Substitution Value
> GST G1SALES GST

- With the above setup, when the Sales Orders are imported, they'll have the G1SALES GST tax code.

- The SPECTAXCLASSES Substitution List is used in exporting of Inventory from MYOB Advanced to Shopify. If the Stock Item's Tax Category is "TAXABLE", when exported to Shopify, the field "Charge Tax on this Product" is set to "True". If the Stock Item's Tax Category is EXMEMPT, when exported to Shopify, the field "Charge Tax on This Product" is set to "False". You change this mapping if you have different Tax Categories set up in MYOB Advanced.

The screenshot displays the configuration page for a Shopify store named 'ProServeED'. The 'ORDER SETTINGS' tab is active, and the 'Substitution Lists' section is highlighted. In the 'Substitution Lists' panel, the 'SPECTAXCLASSES' list is selected. Below this, a table shows the mapping between 'Original Value' and 'Substitution Value'.

* Original Value	* Substitution Value
TAXABLE	TRUE
EXEMPT	FALSE

Other configuration details visible include:

- Connector: Shopify (Active, Default)
- Store Name: ProServeED
- Branch: RBYTEMAIN - Rapid Byte He
- Order Type for Import: EE - Ecommerce Order Type
- Return Order Type: RC - Return for Credit
- Refund Amount Item: REFUND - Refund
- Refund Reason Code: ISSUE - Issue
- Order Time Zone: (GMT+10:00) Canberra, Mel...
- Show Discounts In: Document Discount
- Import Order Risks:
- Hold on Risk Status: High Risk
- Gift Certificate Item: GIFTCERTIFICATE - Gift Cert
- Earliest Order Date: [Dropdown]
- Tag Ext. Order with ERP Order Nbr.:
- Tax Synchronization:
- Default Tax Zone: DOMESTIC - Domestic
- Use as Primary Tax Zone:
- Tax List: SPCTAXCODES
- Tax Category List: SPECTAXCLASSES

For BigCommerce Stores:

BigCommerce Stores
BigCommerce ProServe-BIGCOMMERCE

TEST CONNECTION

Connector: BigCommerce Active
 * Store Name: ProServe-BIGCOMMERCE Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS **ORDER SETTINGS** PAYMENT SETTINGS

GENERAL

* Branch: RBYTEMAIN - Rapid Byte He

ORDER

* Order Type for Import: EE - E-commerce Order Type
 Order Types for Export: EE - E-commerce Order Type
 * Return Order Type: RC - Return for Credit
 * Refund Amount Item: REFUND - Refund
 Refund Reason Code: ISSUE - Issue
 Order Time Zone: (GMT+10:00) Canberra, Mel...
 Show Discounts In: Document Discount
 Gift Certificate Item: GIFTCERTIFICATE - Gift Cert.
 Gift Wrapping Item: GIFTWRAPPING - Gift Wrapp
 Tag Ext. Order with ERP Order Nbr.
 Earliest Order Date:

TAXES

Tax Synchronization
 Default Tax Zone:
 Use as Primary Tax Zone

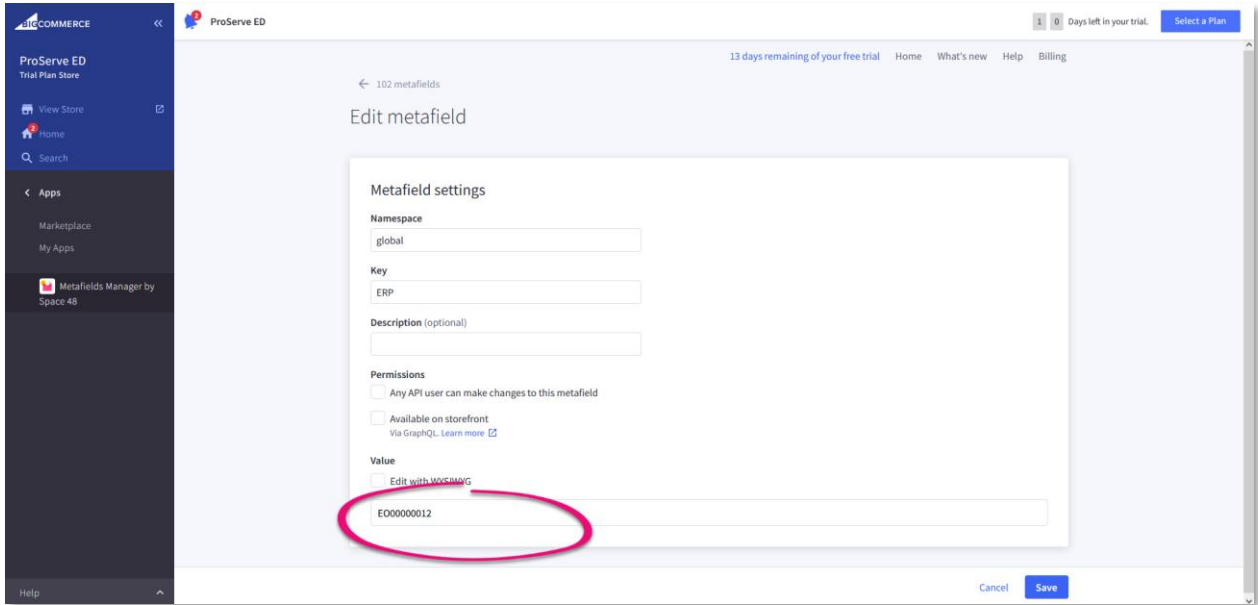
SUBSTITUTION LISTS

* Tax List: BCCTAXCODES
 * Tax Category List: BCCTAXCLASSES

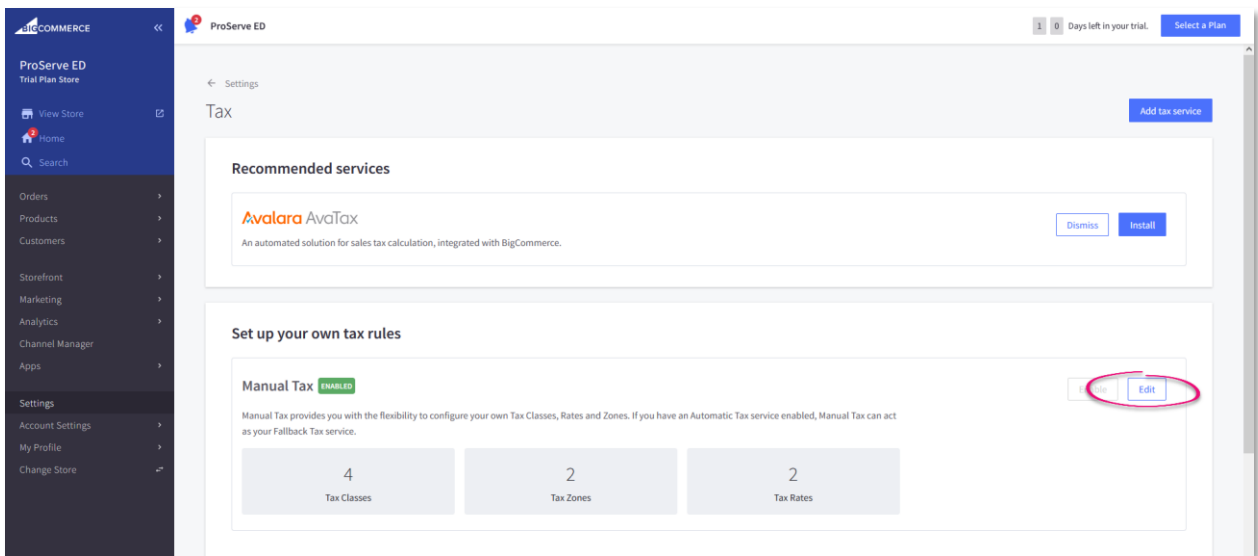
SHIPPING OPTION MAPPING

Active	Store Shipping Zone	* Store Shipping Method	Ship Via	Shipp Zone
<input checked="" type="checkbox"/>	Australia	Free Shipping	DOMESTICST...	
<input checked="" type="checkbox"/>	Australia	Standard AUSPOST	DOMESTICSTD	
<input checked="" type="checkbox"/>	Australia	Express Shipping AUSPOST	DOMEXPRESS	
<input checked="" type="checkbox"/>	Rest of the World	Flat Rate	INTERNATIONAL	

- **Branch:** The default branch for the Sales Orders when they're imported from BigCommerce
- **Order Type for import:** The Order Type to be used when the orders are imported from BigCommerce
- **Order Types for Export:** The Order Types that you would like to export to BigCommerce – for example, customers might call to raise a Sales Orders. You then enter this order into MYOB Advanced, then fulfill it. You can then export this order back to BigCommerce so that when customer logs in to BigCommerce they can see their order.
- **Return Order Type:** The Sales Order Type that will be used for customer returns.
- **Refund Amount Item:** A non-stock item that represents the amount to refund to the customer.
- **Gift Certificate Item:** a non-stock item to be used as a Gift Certificate/Gift Card. Customer can purchase this item on BigCommerce. They use the Gift Card as a payment method.
- **Gift Wrapping Item:** a non-stock item to be used to represent the Gift Wrapping service fee.
- **Tag Ext. Order with ERP Order Nbr** – when ticked: the Sales Order number in MYOB Advanced will be tagged to the BigCommerce Order as a metafield, which you can use for development work. Or if you have an App on BigCommerce like Metafield Manager, you'll be able to see the value of the metafield, like this:



- Tax Synchronisation:
 - When ticked: The Tax ID from BigCommerce will be synced to myob Advanced. In BigCommerce, for Australia, the default Sales Tax ID is “GST”. To view the Tax ID, you can go to Settings > Tax > select Edit in the Manual Tax section:



In the Tax Rate and Zones tab, select Australia and select Edit Rates

ProServe ED 1 0 Days left in your trial. [Select a Plan](#)

Tax [Browse configured services](#)

General Tax Classes Tax Rates & Zones

Create or Modify Tax Rates & Zones

[Add a Tax Zone](#)

<input type="checkbox"/>	Zone Name	Zone Type	Price Display	Status	Action
<input checked="" type="checkbox"/>	Default Zone (Everywhere Else - What does this mean?)	Global	Tax Inclusive		...
<input type="checkbox"/>	Australia	Country Based	Tax Inclusive	✔	...

Edit Settings

Edit Rates

Copy

Delete

You'll be able to see the tax rate and the Tax ID and the rate applicable to each Tax Class:

Edit Australia [Back to tax zones page](#)

Zone Settings Tax Rates

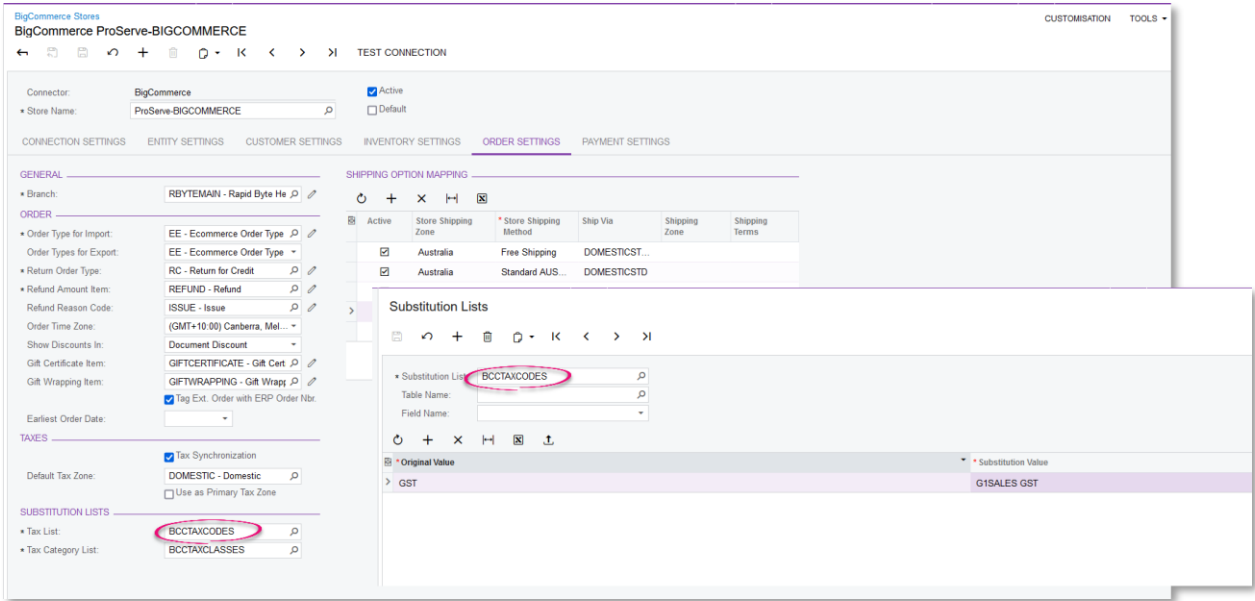
The tax rates for this zone are listed below. Add a new tax rate to this zone by clicking 'Add a Tax Rate'.

[Add a Tax Rate](#)

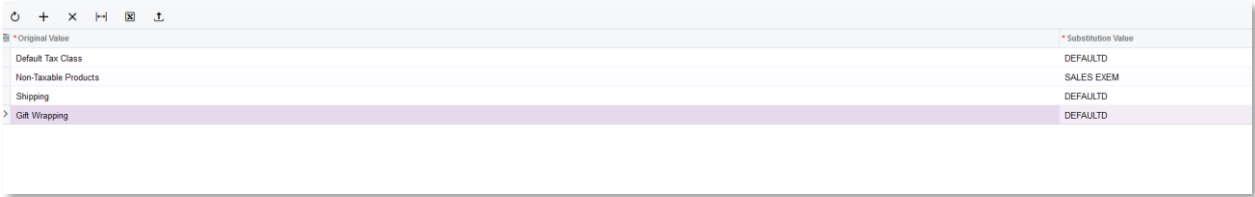
<input type="checkbox"/>	Name	Rates	Calculation Priority	Status	Action
<input type="checkbox"/>	GST	Default Tax Class: 10% Gift Wrapping: 10% Non-Taxable Products: 0% Shipping: 10%	0	✔	...

Tip: Tax Classes are equivalent to Tax Categories for inventory items in MYOB Advanced.

- You should ensure that the GST Tax ID also exists in MYOB Advanced. Alternatively, in the Substitution List section, in the Tax List substitution list, you should create a mapping for the GST Tax ID to the Tax ID in MYOB Advanced, like this:



- With the above setup, when the Sales Orders are imported, they'll have the G1SALES GST tax code.
- The BCCTAXCLASSES Substitution List is used for mapping BigCommerce Tax Classes with MYOB Advanced Tax Categories – below is an example:



- Shipping Options Mapping: you can map the Store Shipping Zone and Store Shipping Method with MYOB Advanced's Ship Via Codes (and Shipping Zone and Shipping Terms if required):

BigCommerce Stores
BigCommerce ProServe-BIGCOMMERCE

Connector: BigCommerce Active
 Store Name: ProServe-BIGCOMMERCE Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS **ORDER SETTINGS** PAYMENT SETTINGS

GENERAL

Branch: RBYTEMAIN - Rapid Byte He

ORDER

Order Type for Import: [dropdown]
 Order Types for Export: EE - Ecommerce Order Type
 Return Order Type: RC - Return for Credit
 Refund Amount Item: REFUND - Refund
 Refund Reason Code: ISSUE - Issue
 Order Time Zone: (GMT+10:00) Canberra, Mel...
 Show Discounts In: Document Discount
 Gift Certificate Item: GIFTCERTIFICATE - Gift Cert
 Gift Wrapping Item: GIFTWRAPPING - Gift Wrap
 Tag Ext. Order with ERP Order Nbr.

Earliest Order Date: [dropdown]

TAXES

Tax Synchronization
 Default Tax Zone: DOMESTIC - Domestic
 Use as Primary Tax Zone

SUBSTITUTION LISTS

Tax List: BCCTAXCODES
 Tax Category List: BCCTAXCLASSES

SHIPPING OPTION MAPPING

Active	Store Shipping Zone	* Store Shipping Method	Ship Via	Shipping Zone	Shipping Terms
<input checked="" type="checkbox"/>	Australia	Free Shipping	DOMESTICST...		
<input checked="" type="checkbox"/>	Australia	Standard AUS...	DOMESTICSTD		
<input checked="" type="checkbox"/>	Australia	Express Shippi...	DOMEXPRESS		
<input checked="" type="checkbox"/>	Australia	None	LOCAL		
<input checked="" type="checkbox"/>	Rest of the World	Flat Rate	INTERNATIONAL		

Payment Settings

In the Payment Settings tab (both Shopify Stores and BigCommerce Stores), map the store's Payment Methods with MYOB Advanced's Payment Methods and Cash Accounts.

BigCommerce Stores
BigCommerce ProServe-BIGCOMMERCE

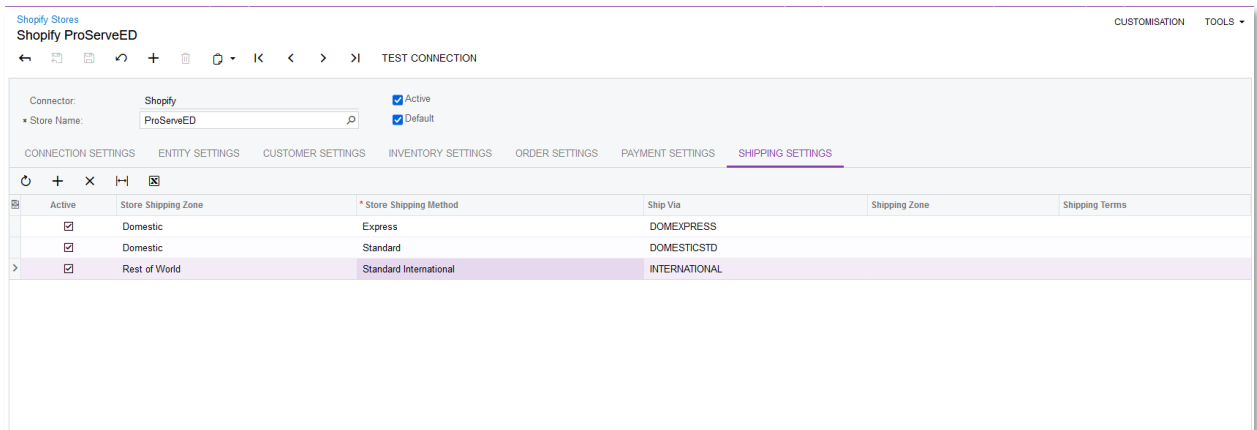
Connector: BigCommerce Active
 Store Name: ProServe-BIGCOMMERCE Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS ORDER SETTINGS **PAYMENT SETTINGS**

Active	* Store Payment Method	* Store Currency	Payment Method ID	Cash Account	Release Payments	Process Refunds
<input checked="" type="checkbox"/>	CUSTOM (CUSTOM)	AUD	CASH	100016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	GIFTCERTIFICATE (GIFT_CERTIFICATE)	AUD	CASH	100016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	STORECREDIT (STORE_CREDIT)	AUD	CASH	100016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	TEST PAYMENT GATEWAY	AUD	AUWBCCD	100016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AMAZON	AUD			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	CUSTOM	AUD			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	PAYPAL	AUD			<input type="checkbox"/>	<input type="checkbox"/>

Shipping Settings (Shopify Stores only)

Map the Store Shipping Zone and Store Shipping Method with MYOB Advanced's Ship Via Codes (and Shipping Zone and Shipping Terms if required):



Sales Order Processing – Shopify

In the example below, synchronisation has been turned on for the following entities:

- Customer
- Customer Location
- Sales Order
- Stock Item
- Shipment
- Payment

Therefore, every time an entity is created/updated in either system, a corresponding entity is also created/updated in the other system.


Raising a Sales Order:

On the store front, the customers can browse through the product and add the product to Cart. After that, they would review the Cart, check out, enter the Contact Email Address, pick shipping method, enter credit card details, and pay:


ProServe.ED
Cart > Information > Shipping > Payment

Contact	guestcustomer001@myob.com	Change
Ship to	168 Cremorne Street, level 5, Cremorne VIC 3121, Australia	Change
Method	Standard · Free	Change

Payment
All transactions are secure and encrypted.


 This store can't accept real orders or real payments.

Credit card VISA AMEXA

Card number
4242 4242 4242 4242 

Name on card
Leon Chau

Expiration date (MM / YY)
12 / 30

Security code
123 

Cash on Delivery (COD)

Billing address
Select the address that matches your card or payment method.


Same as shipping address

Use a different billing address

Remember me

Save my information for a faster checkout


[Return to shipping](#) **Pay now**

 1	AceKing 18.5inch Amoled Monitor	\$1,500.00
Subtotal		\$1,500.00
Shipping		Free
Total	AUD	\$1,500.00

Once a payment is completed, a Sales Order is generated on Shopify:

ProServe.ED

Order #1013
Thank you Leon (MYOB) - guest!



Your order is confirmed
You'll receive a confirmation email with your order number shortly.

[Download Shop to track package](#)

Email me with news and offers

Customer information

<p>Contact information guestcustomer001@myob.com</p> <p>Shipping address Leon (MYOB) - guest Chau 168 Cremorne Street level 5 Cremorne VIC 3121 Australia</p> <p>Shipping method Standard</p> <p><input type="checkbox"/> Save my information for a faster checkout</p>	<p>Payment method ending with 4242 - \$1,500.00</p> <p>Billing address Leon (MYOB) - guest Chau 168 Cremorne Street level 5 Cremorne VIC 3121 Australia</p>
--	--

[Need help? Contact us](#) Continue shopping

	AceKing 18.5inch Amoled Monitor	\$1,500.00
<hr/>		
Subtotal		\$1,500.00
Shipping		Free
<hr/>		
Total		AUD \$1,500.00


Here we're doing a checkout as a Guest (notice on the screen above, the field "Save my information for a faster checkout" was left blank). In the backend, in the Orders list, you can see the Sales Order like below – notice the status of the Sales Order is "Paid", "Unfulfilled"

#1013 Paid Unfulfilled Refund Edit More actions

5 July 2022 at 3:33 pm from Online Store

Test order
Your payment gateway is in test mode.
[View payment settings](#)

Unfulfilled (1)

	AceKing 18.5inch Amdoled Monitor SKU: ITM0000045	\$1,500.00 × 1	\$1,500.00
---	---	----------------	------------

[Fulfill item](#) [Create shipping label](#)

Notes [Edit](#)

No notes from customer

Paid

Subtotal	1 item	\$1,500.00
Shipping	Standard (1.0 kg)	\$0.00
Total		\$1,500.00

Paid by customer \$1,500.00

Customer [Edit](#)

[Leon \(MYOB\) Chau](#)
No orders

CONTACT INFORMATION

guestcustomer001@myob.com
No phone number

SHIPPING ADDRESS

Leon (MYOB) - guest Chau
168 Cremorne Street
level 5
Cremorne VIC 3121
Australia
[View map](#)

BILLING ADDRESS

Same as shipping address

Timeline Show comments

PA Leave a comment... [Post](#)

Only you and other staff can see comments

TODAY

- Order confirmation email was sent to Leon (MYOB) Chau (guestcustomer001@myob.com).

[Resend email](#)

1 minute ago
- A \$1,500.00 AUD payment was processed using a Visa ending in 4242.

1 minute ago
- \$1,456.20 AUD will be added to your next payout.

1 minute ago

Conversion summary

- This is their 0th order
- 1st session was direct to your store
- 2 sessions over 1 day

[View conversion details](#)

Fraud analysis

LOW MEDIUM HIGH

Syncing the Sales Order:

If the synchronisation was set up correctly, this Sales Order will then be synced to MYOB Advanced (if you have Real-Time Sync turned on and Real-Time Mode is Prepare & Process, the Sales Orders will be imported immediately; If you don't have real time sync turn on, you need to Prepare Data and Process Data for the Sales Order to be imported).

The Sales Order imported to MYOB Advanced looks like below:

Sales Orders
EE E000000015 - Leon (MYOB) Chau

← → ↻ + ✖ 🗑️ 📄 ⌂ 🔍 CREATE SHIPMENT HOLD ...

Order Type: EE Order Nbr: E000000015 Status: Open Date: 5/07/2022 Requested On: 5/07/2022 Customer Ord.: #1013 External Refer.: 458681879761

Customer: EE000007 - Leon (MYOB) Chau Location: RBYTEMAIN - Leon (MYOB) - guest C Contact: Chau, Leon (MYOB) Currency: AUD 1.00 Project: X - Non-Project Code

Ordered Qty.: 1.00 Discount Total: 0.00 GST Exempt T.: 0.00 GST Taxable T.: 0.00 Tax Total: 0.00 Order Total: 1,500.00

Description: ProServeED | Order: #1013 | Status: Paid

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RISKS TOTALS

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOM	Quantity	Qty On Shipments	Open Qty	Unit Price	Manual Price	Ext. Price	Discount Percent	Discount Amount	Discount Code	Manual Discount	Disc. Unit Price	Amount
RBYTEMAIN	IT0000045		MAIN	AceKing 18 Inch Amoled Monitor	EACH	1.00	0.00	1.00	1,500.00		1,500.00	0.000000	0.00			1,500.00	1,500.00

Notice that even when the customer checks out as Guest, the system still creates a customer using the Numbering Sequence configured in the Order Settings tab of the Shopify Stores screen (the numbering sequence used in this example starts with “EE”). This is because the legacy checkout as guest option is not available for Shopify. Instead, Shopify has streamlined their Customer Accounts process where each customer can register and have ShopPay account, instead of being a . Therefore, the system doesn’t treat a guest customer as a guest customer, but instead, an actual customer, which will be then imported to MYOB Advanced.

If the customer checks out as an existing customer, the Sales Order will have the Customer ID of that existing customer. Also on this Sales Orders screen, the following fields are populated:

- Customer Order: populated with Shopify Order number
- External Reference: is populated with the External ID of the Sales Order Entity.
- Description: shows Store name, Order Number, and payment status.

In the Payments tab, the system automatically creates a Prepayment – in this example, the status of the Prepayment is “Open” because the field “Release Payment” of the Payment Method was set to true in the Payment Settings tab in the Shopify Store.

Sales Orders
EE E000000015 - Leon (MYOB) Chau

← → ↻ + ✖ 🗑️ 📄 ⌂ 🔍 CREATE SHIPMENT HOLD ...

Order Type: EE Order Nbr: E000000015 Status: Open Date: 5/07/2022 Requested On: 5/07/2022 Customer Ord.: #1013 External Refer.: 458681879761

Customer: EE000007 - Leon (MYOB) Chau Location: RBYTEMAIN - Leon (MYOB) - guest C Contact: Chau, Leon (MYOB) Currency: AUD 1.00 Project: X - Non-Project Code

Ordered Qty.: 1.00 Discount Total: 0.00 GST Exempt T.: 0.00 GST Taxable T.: 0.00 Tax Total: 0.00 Order Total: 1,500.00

Description: ProServeED | Order: #1013 | Status: Paid

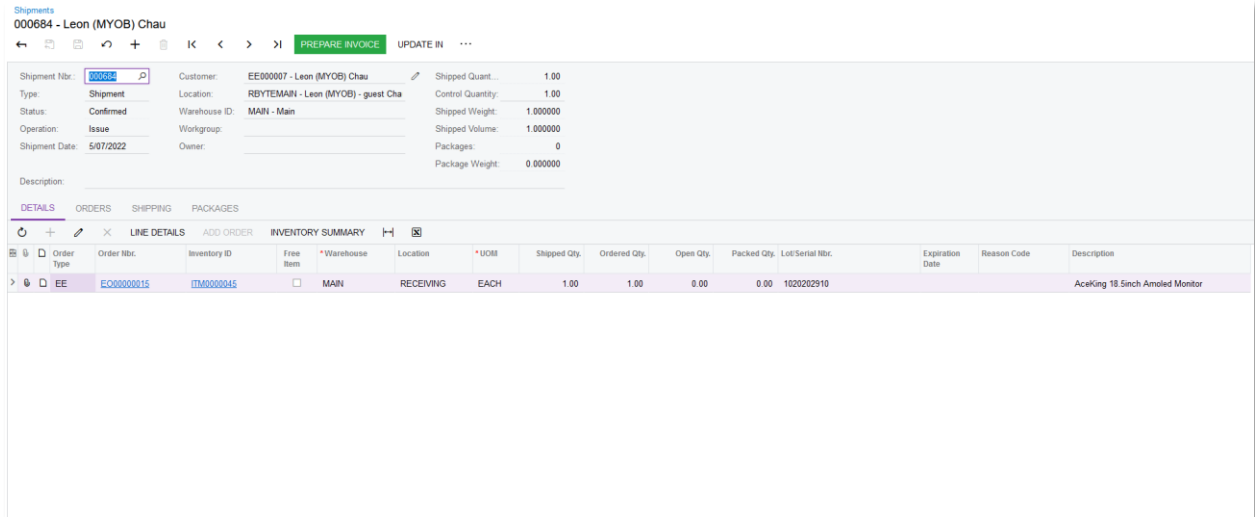
DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RISKS TOTALS

CREATE PAYMENT CREATE PREPAYMENT

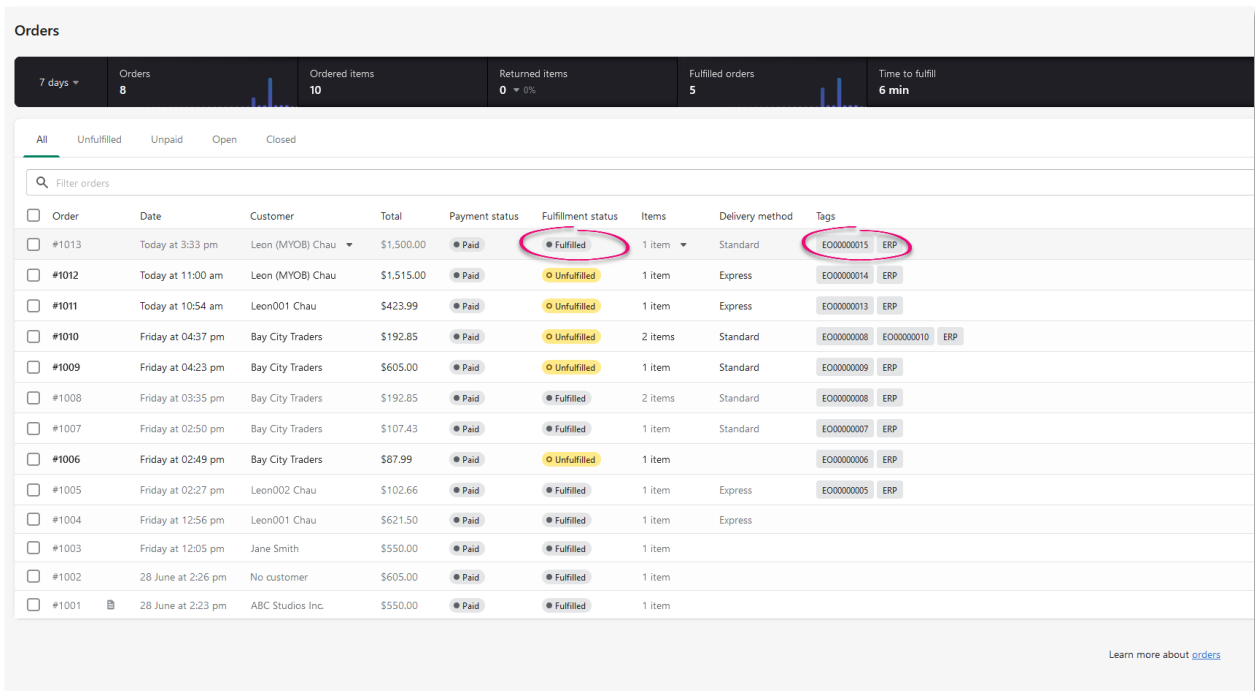
Doc. Type	Reference Nbr.	Applied To Order	Transferred to Invoice	Balance	Status	Payment Ref.	Payment Method	Cash Account	Payment Amount	Currency
Prepayment	000339	1,500.00	0.00	0.00	Open	5571828875311	AUWBDCD	100016	1,500.00	AUD

Fulfilling the Sales Order:

In MYOB Advanced, the warehouse employee will create a Shipment and Confirm the Shipment as usual: When the Shipment is Confirmed, and synched to Shopify (through the Shipment Entity), the Status of the Sales Order in Shopify is changed to Shipped.



When the Shipment is Confirmed, and synched to Shopify (through the Shipment Entity), the Status of the Sales Order in Shopify is changed to "Fulfilled":

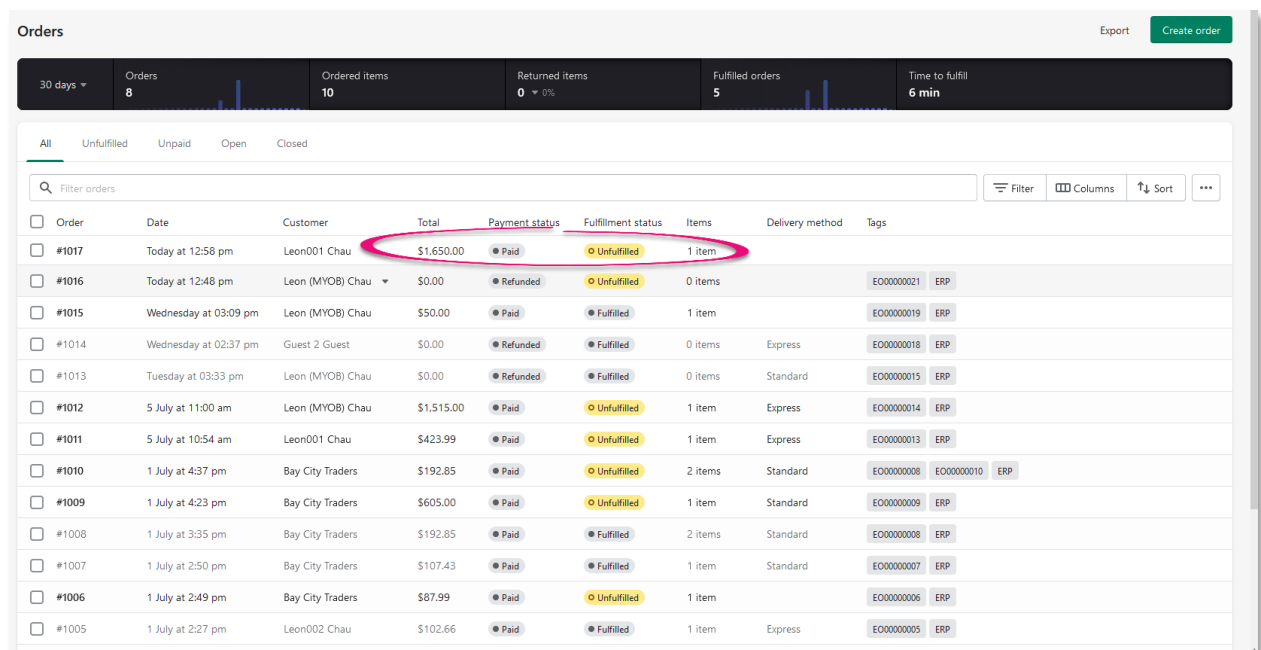


Preparing Invoice in MYOB Advanced:

In MYOB Advanced, if the Prepayment created from Shopify was released, then when the users Prepare Invoice and Release Invoice for a Sales Order after the Shipment has been confirmed, the Status of the SO Invoice becomes "Closed". However, if the Prepayment was not released, then the status of the SO Invoice becomes "Open". The users will have to manually apply the Prepayment on the SO Invoice to close it.

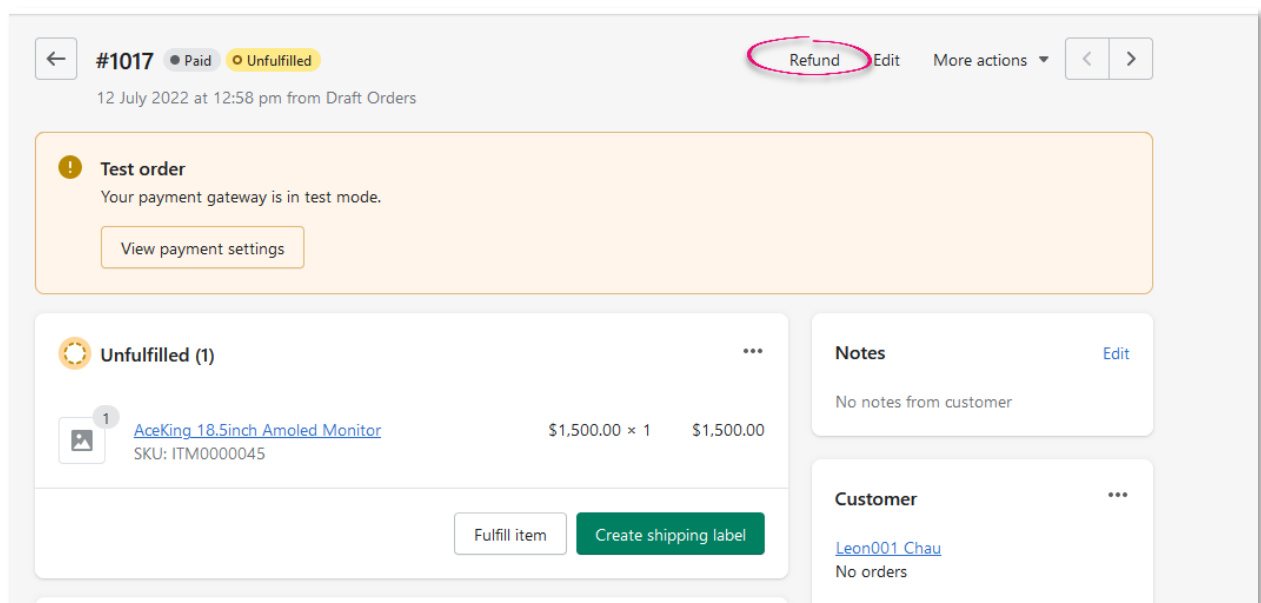
Processing Customer Refund (for unfulfilled orders)

To process a Customer Refund for unfulfilled orders, firstly, in Shopify, you need to open a Sales Order that has been synced paid and synced to MYOB Advanced:



Order	Date	Customer	Total	Payment status	Fulfillment status	Items	Delivery method	Tags
#1017	Today at 12:58 pm	Leon001 Chau	\$1,650.00	Paid	Unfulfilled	1 item		
#1016	Today at 12:48 pm	Leon (MYOB) Chau	\$0.00	Refunded	Unfulfilled	0 items		EO00000021 ERP
#1015	Wednesday at 03:09 pm	Leon (MYOB) Chau	\$50.00	Paid	Fulfilled	1 item		EO00000019 ERP
#1014	Wednesday at 02:37 pm	Guest 2 Guest	\$0.00	Refunded	Fulfilled	0 items	Express	EO00000018 ERP
#1013	Tuesday at 03:33 pm	Leon (MYOB) Chau	\$0.00	Refunded	Fulfilled	0 items	Standard	EO00000015 ERP
#1012	5 July at 11:00 am	Leon (MYOB) Chau	\$1,515.00	Paid	Unfulfilled	1 item	Express	EO00000014 ERP
#1011	5 July at 10:54 am	Leon001 Chau	\$423.99	Paid	Unfulfilled	1 item	Express	EO00000013 ERP
#1010	1 July at 4:37 pm	Bay City Traders	\$192.85	Paid	Unfulfilled	2 items	Standard	EO00000008 EO00000010 ERP
#1009	1 July at 4:23 pm	Bay City Traders	\$605.00	Paid	Unfulfilled	1 item	Standard	EO00000009 ERP
#1008	1 July at 3:35 pm	Bay City Traders	\$192.85	Paid	Fulfilled	2 items	Standard	EO00000008 ERP
#1007	1 July at 2:50 pm	Bay City Traders	\$107.43	Paid	Fulfilled	1 item	Standard	EO00000007 ERP
#1006	1 July at 2:49 pm	Bay City Traders	\$87.99	Paid	Unfulfilled	1 item		EO00000006 ERP
#1005	1 July at 2:27 pm	Leon002 Chau	\$102.66	Paid	Fulfilled	1 item	Express	EO00000005 ERP

Click Refund on the Sales Order:



← #1017 Paid Unfulfilled Refund Edit More actions >

12 July 2022 at 12:58 pm from Draft Orders

Test order
Your payment gateway is in test mode.
[View payment settings](#)

Unfulfilled (1)

1 [AceKing 18.5inch Amdoled Monitor](#) \$1,500.00 × 1 \$1,500.00
SKU: ITM0000045

[Fulfill item](#) [Create shipping label](#)


Notes Edit
No notes from customer

Customer ...
[Leon001 Chau](#)
No orders

Enter the qty to be refunded, then click Refund:

← Refund

Unfulfilled 168 Cremorne Street

 **AceKing 18.5inch Amoled Monitor** / 1 \$1,500.00
ITM0000045
\$1,500.00

Refunded items will be removed from the order.

Restock item

Reason for refund

Only you and other staff can see this reason.

Learn more about [refunding orders](#).

Summary

Items subtotal \$1,500.00
1 item

Tax \$150.00

Refund total \$1,650.00

REFUND AMOUNT

Shopify Payments
(**** 4242)

\$ 1,650.00

\$1,650.00 available for refund

Send a [notification](#) to the customer

Refund \$1,650.00

Go back to the Sales Order, notice the Sales Order status has been cancelled:

EE EO00000024 - eCommerce Generic Customer

← ↻ + 🗑️ 📄 ⏪ ⏩ REOPEN ORDER COPY ORDER ...

Order Type: EE	Customer: ECOMCUST - eCommerce Generic Cust	Ordered Qty.: 1.00
Order Nbr.: EO00000024	Location: RBYTEMAIN - Primary Location	Discount Total: 0.00
Status: Canceled	Contact: Guest, eCom	GST Exempt T... 0.00
Date: 12/07/2022	Currency: AUD 1.00	GST Taxable T... 1,500.00
Requested On: 12/07/2022	Project: X - Non-Project Code	Tax Total: 150.00
Customer Ord... #1019		Order Total: 1,650.00
External Refer... 462034694967	Description: ProServeED Order: #1019 Status: Refunded	

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS **PAYMENTS** RISKS TOTALS

🔄 + ✕ CREATE PAYMENT CREATE PREPAYMENT 📄 🗑️

Doc. Type	Reference Nbr.	Applied To Order	Transferred to Invoice	Balance	Status	Payment Ref.	Payment Method	Cash Account	Payment Amount	Currency
Prepayment	000350	0.00	0.00	1,650.00	Open	5606022676527	AUWB CDC	100016	1,650.00	AUD

Open the Prepayment attached to the Sales Order, and select Actions > Refund to create a Customer Refund:

The screenshot displays a web application interface for managing payments and applications. The main header shows 'Payments and Applications' and 'Prepayment 000350 - eCommerce Generic Customer'. A context menu is open over the 'Refund' option, which is highlighted with a red circle. The menu includes options like 'Processing', 'Remove Hold', 'Hold', 'Release', 'Refund', 'Corrections', and 'Void'. The background shows various fields for customer information and a table for documents to apply.

Doc. Type	*Reference Nbr.	*Line Nbr.	Inventory ID	Project	Project Task	Cost Code

Release the Customer Refund to complete the Refund process:

https://myobadvanceddemo-retail-commerce.myobadvanced.com/(W(10000))/pages/ar/ar302000.aspx?PopupPanel=On&CompanyID=

Payments and Applications

Customer Refund 000352 - eCommerce Generic Customer

NOTES ACTIVITY

The operation has completed.

Type: Customer ... Customer: ECOMCUST - eCommerce Generic Cust Payment Amo... 1,650.00

Reference Nbr.: 000352 Location: RBYTEMAIN - Primary Location Applied to Doc... 0.00

Status: Closed Payment Meth... AUWBCDC - AU Westpac Banking Corp Applied to Ord... 0.00

Post Date: 12/07/2022 Card/Account ... Available Bala... 0.00

Post Period: 01-2023 Cash Account: 100016 - AU WBC Bank Corp Account H Write-Off Amo... 0.00

Payment Ref.: 1019 Currency: AUD 1.00 VIEW BASE Finance Charg... 0.00

Deducted Char... 0.00

Description: ProServeED | Order: #1019 | Type: Sale | Status: Success | Gateway: shopify_payments

DOCUMENTS TO APPLY SALES ORDERS APPLICATION HISTORY FINANCIAL APPROVALS CHARGES

LOAD DOCUMENTS AUTO APPLY

Branch	Doc. Type	*Reference Nbr.	*Line Nbr.	Inventory ID	Project	Project Task	Cost Code
--------	-----------	-----------------	------------	--------------	---------	--------------	-----------

Processing Customer Refund (for fulfilled orders)

Open a Sales Order in Shopify that has been paid and fulfilled:

Orders

Export Create order

30 days ▾ Orders 8 Ordered items 10 Returned items 0 0% Fulfilled orders 5 Time to fulfill 6 min

All Unfulfilled Unpaid Open Closed

Filter orders

Order	Date	Customer	Total	Payment status	Fulfillment status	Items	Delivery method	Tags
#1023	Today at 2:32 pm	Guest 2 Guest	\$1,666.50	Paid	Fulfilled	1 item	Express	EO00000028 ERP
#1022	Today at 2:23 pm	Guest 2 Guest	\$0.00	Refunded	Fulfilled	0 items		EO00000027 ERP
#1021	Today at 2:12 pm	Guest 2 Guest	\$0.00	Refunded	Unfulfilled	0 items		EO00000026 ERP
#1020	Today at 2:05 pm	Guest 2 Guest	\$0.00	Refunded	Unfulfilled	0 items		EO00000025 ERP
#1019	Today at 1:23 pm	Zoe Lai	\$0.00	Refunded	Unfulfilled	0 items		EO00000024 ERP
#1018	Today at 1:11 pm	Leon001 Chau	\$0.00	Refunded	Unfulfilled	0 items		EO00000023 ERP
#1017	Today at 12:58 pm	Leon001 Chau	\$0.00	Refunded	Unfulfilled	0 items		EO00000022 ERP
#1016	Today at 12:48 pm	Leon (MYOB) Chau	\$0.00	Refunded	Unfulfilled	0 items		EO00000021 ERP
#1015	Wednesday at 03:09 pm	Leon (MYOB) Chau	\$50.00	Paid	Fulfilled	1 item		EO00000019 ERP
#1014	Wednesday at 02:37 pm	Guest 2 Guest	\$0.00	Refunded	Fulfilled	0 items	Express	EO00000018 ERP

OPTIONAL: if you use Shopify to create a Return label, then click Return Item to generate and send a Return label to the customer:


Search

Setup guide PA ProServe.ED Admin

← #1023 ● Paid ● Fulfilled Refund **Return items** Edit More actions < >

12 July 2022 at 2:32 pm from Draft Orders

Test order
Your payment gateway is in test mode.
[View payment settings](#)

Fulfilled (1) #1023-F1		Notes
	AceKing 18.5inch Amdoled Monitor SKU: ITM0000045	No notes from customer
\$1,500.00 × 1	\$1,500.00	Edit
Add tracking		


Paid		Customer
Subtotal	1 item	Guest 2 Guest No orders
Shipping	Express (1.0 kg)	
Tax	GST 10%	
Total		

CONTACT INFORMATION
guestcust002@myob.com
No phone number

SHIPPING ADDRESS

← **Return items**

Fulfilled (1) #1023-F1 168 Cremorne Street

 **AceKing 18.5inch Amdoled Monitor** 1 kg 1 / 1
ITM0000045

Select a return reason

Return shipping options

Upload a return label

Add file

or add a return label URL

Tracking number Shipping carrier

No shipping required

Summary

- Returning 1 item
Reason: Received the wrong item
- DHL eCommerce #20349230948239

[Create return](#)

Click Refund to process a Refund:

← #1023 ● Paid ● Fulfilled ● Return in progress Refund Edit More actions >

12 July 2022 at 2:32 pm from Draft Orders

Test order
Your payment gateway is in test mode.
[View payment settings](#)

Return in progress (1) #1023-R1 ⋮

DHL eCommerce Tracking
[20349230948239](#)

AceKing 18.5inch Amoled Monitor \$1,500.00 × 1 \$1,500.00
SKU: ITM0000045
• Return reason: Received the wrong item

Refund

Notes [Edit](#)

No notes from customer

Customer ⋮

[Guest 2 Guest](#)
No orders

CONTACT INFORMATION

guestcust002@myob.com

No phone number

SHIPPING ADDRESS

[Guest 2 Guest](#)

1877 Cremorne Street
Cremorne VIC 3121
Australia
[View map](#)

BILLING ADDRESS

Paid

Subtotal	1 item	\$1,500.00
Shipping	Express (1.0 kg)	\$15.00
Tax	GST 10%	\$151.50
Total		\$1,666.50
Paid by customer		\$1,666.50

Enter the amount to be Refunded and proceed with the refund (OPTIONAL: if you want to refund the Shipping fee to the customer as well, you can enter the Refund Shipping amount:

← Refund returned items Cancel

Return in progress #1023-R1

AceKing 18.5inch Amoled Monitor \$1,500.00
SKU: ITM0000045
• Return reason: Received the wrong item

Restock 1 item at 168 Cremorne Street

Refund shipping

Shipping rate: Express (\$15.00)

Refund amount

\$ 0.00

Summary

Items subtotal	\$1,500.00
1 item	
Tax	\$150.00
Shipping	\$0.00
Refund total	\$1,650.00

REFUND AMOUNT

Shopify Payments
(**** 4242)

\$ 1,650.00

\$1,666.50 available for refund

Send a [notification](#) to the customer

Refund \$1,650.00

In MYOB Advanced, the system automatically generates a Return order type, with a customer refund automatically applied against it. Select Create Receipt to bring the stock back into inventory:

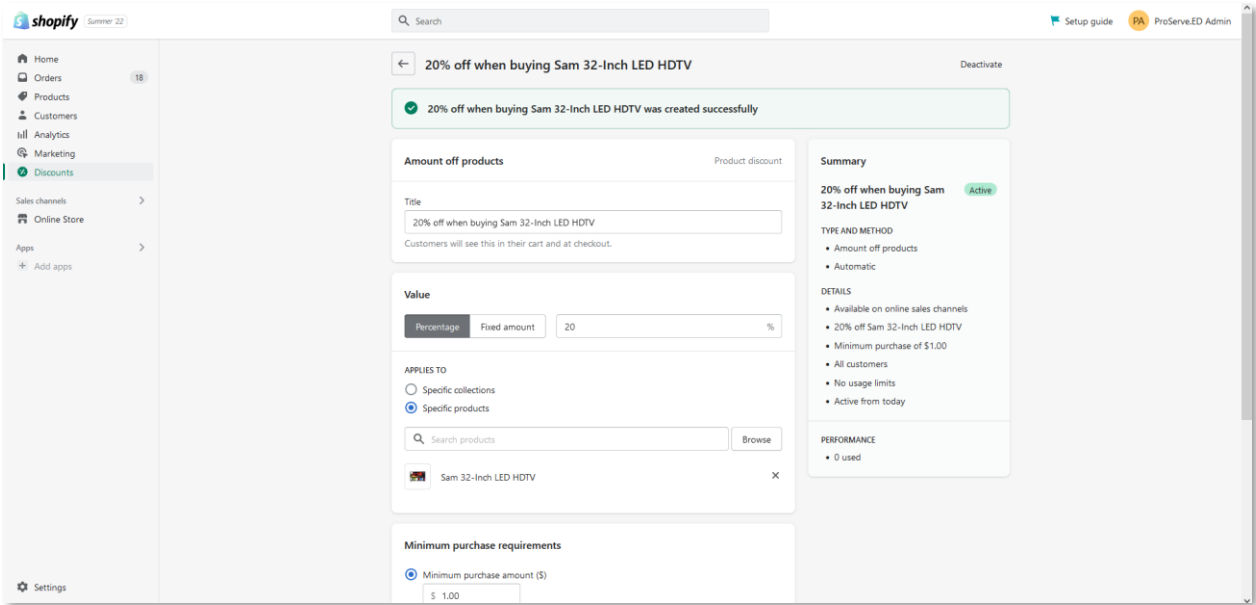
The screenshot shows the 'Sales Orders' interface for order 'RC 001936 - Guest 2 Guest'. At the top, there are navigation buttons: 'CREATE RECEIPT' and 'CREATE SHIPMENT'. The 'CREATE RECEIPT' button is circled in red. Below the buttons, there is a summary section with fields for Order Type, Order Nbr., Status, Date, Requested On, Customer Ord., External Refer., Customer, Location, Contact, Currency, Project, Ordered Qty., Discount Total, GST Exempt T., GST Taxable T., Tax Total, and Order Total. The 'PAYMENTS' tab is active, showing a table with columns: Doc. Type, Reference Nbr., Applied To, Transferred to Invoice, Balance, Status, Payment Ref., Payment Method, Cash Account, Payment Amount, and Currency. A row for 'Customer Refund' with reference number '000358' and an amount of '1,650.00' is highlighted with a red circle. To the right, a summary box shows 'Not Released: 1,650.00', 'Released: 0.00', 'Total Paid: 1,650.00', 'Total Transferr...: 0.00', 'Unpaid Balance: 0.00', and 'Unbilled Balan...: 1,650.00'.

Once you Confirm Shipment and Prepare Invoice, MYOB Advanced generates a Credit Memo with the Customer Refund applied on it:

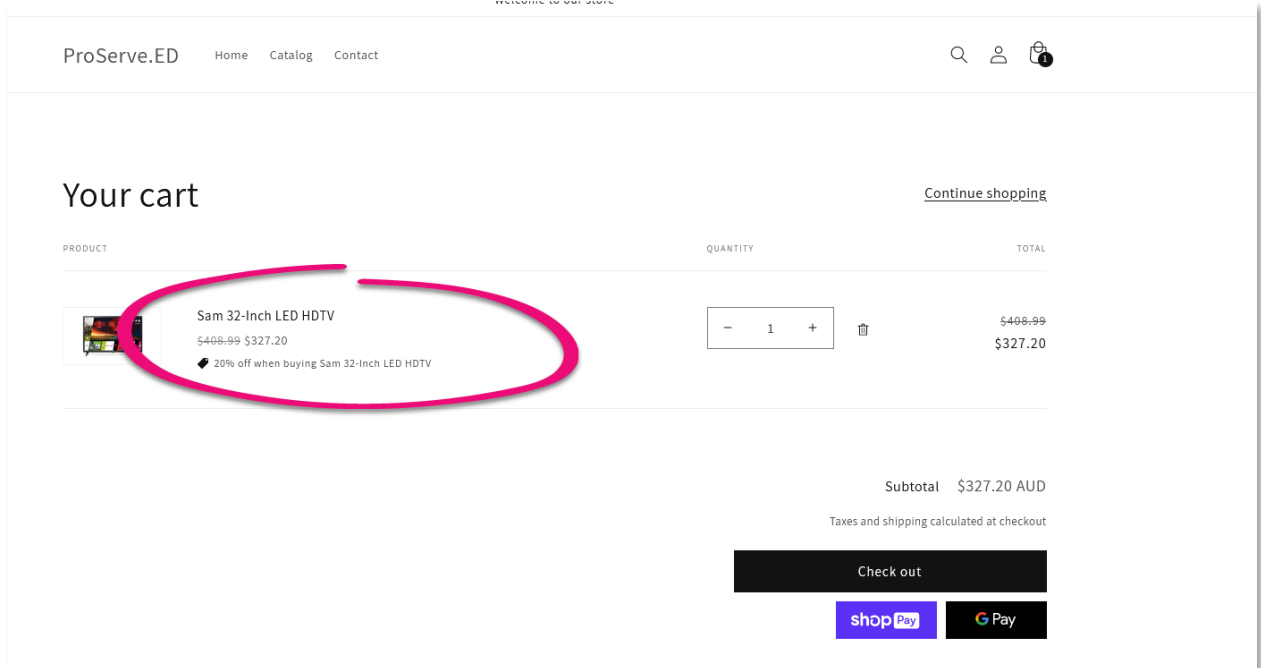
The screenshot shows the 'Invoices' interface for 'Credit Memo 001937 - Guest 2 Guest'. The 'Type' is set to 'Credit Me...'. The summary section includes fields for Reference Nbr., Status, Date, Post Period, Customer Ord., Project/Contract, Description, Customer, Location, Currency, Terms, Due Date, Prompt Payme..., Detail Total, Discount Total, GST Taxable T., GST Exempt T., Tax Total, Write-Off Total, Balance, Amount, and Prompt Payme... The 'APPLICATIONS' tab is active, showing a table with columns: Doc. Type, Reference Nbr., Customer, Amount Paid, Date, Balance, Description, Currency, Post Period, Customer Order Nbr., and Status. A row for 'Customer Refund' with reference number '000358' and an amount of '1,650.00' is shown, with a date of '12/07/2022' and a status of 'Closed'.

Discount

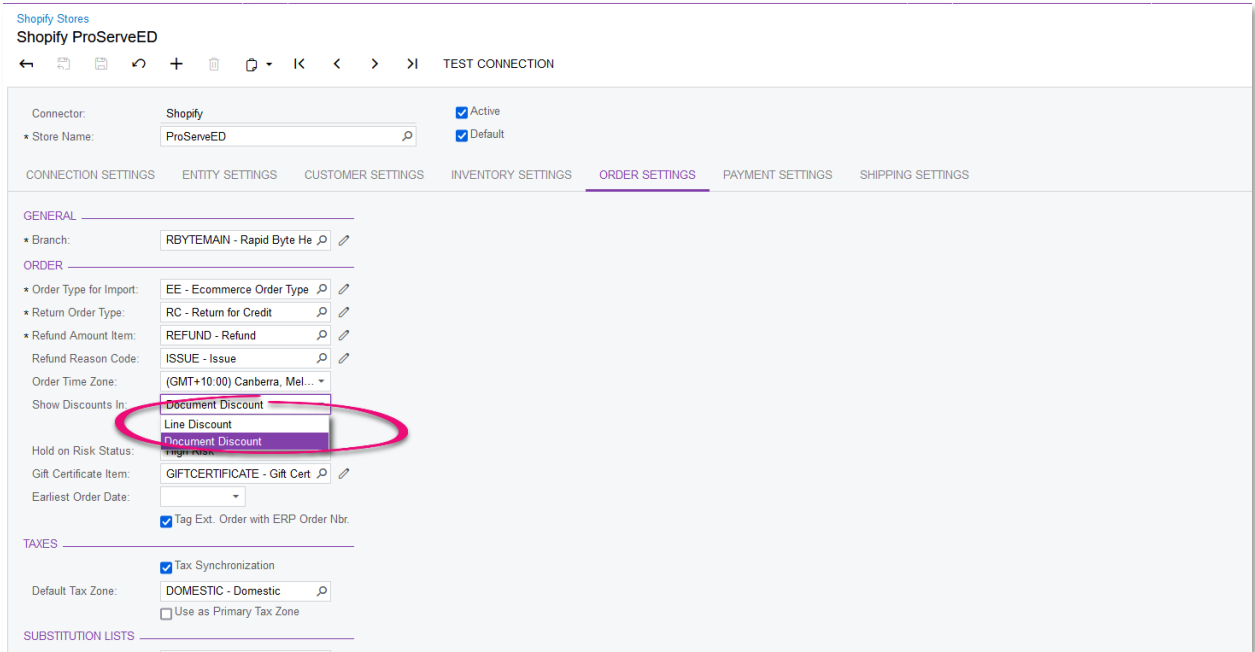
In Shopify, Discount is configured in the Discounts page – you can configure different types of Discounts in Shopify, such as discount off products, discount off orders, discount off shipping, or buy X get Y:



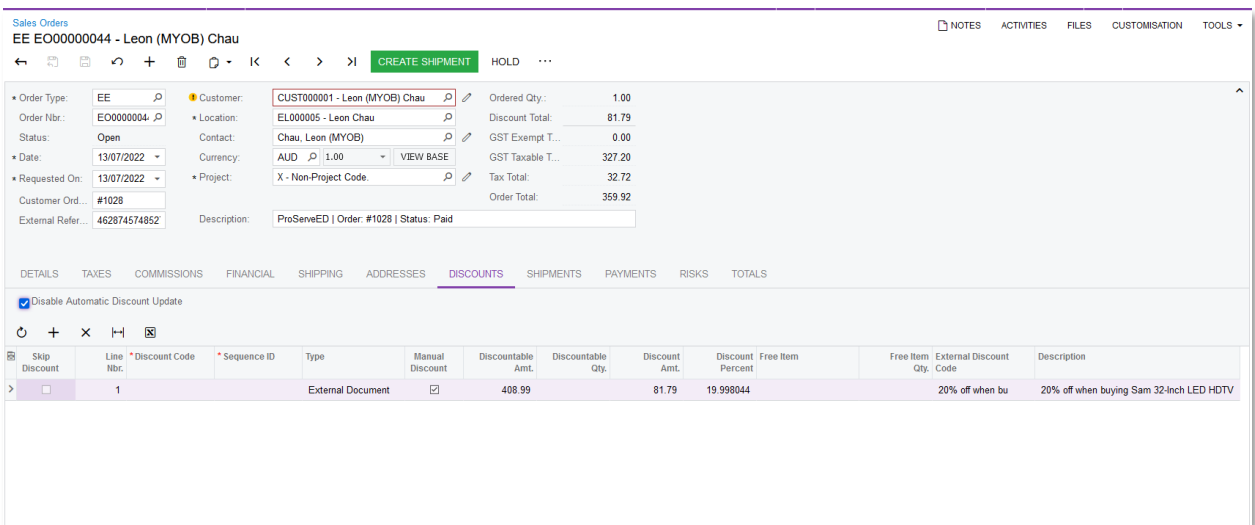
When the customer meets the condition for discounts, they will see the discount during checkout:



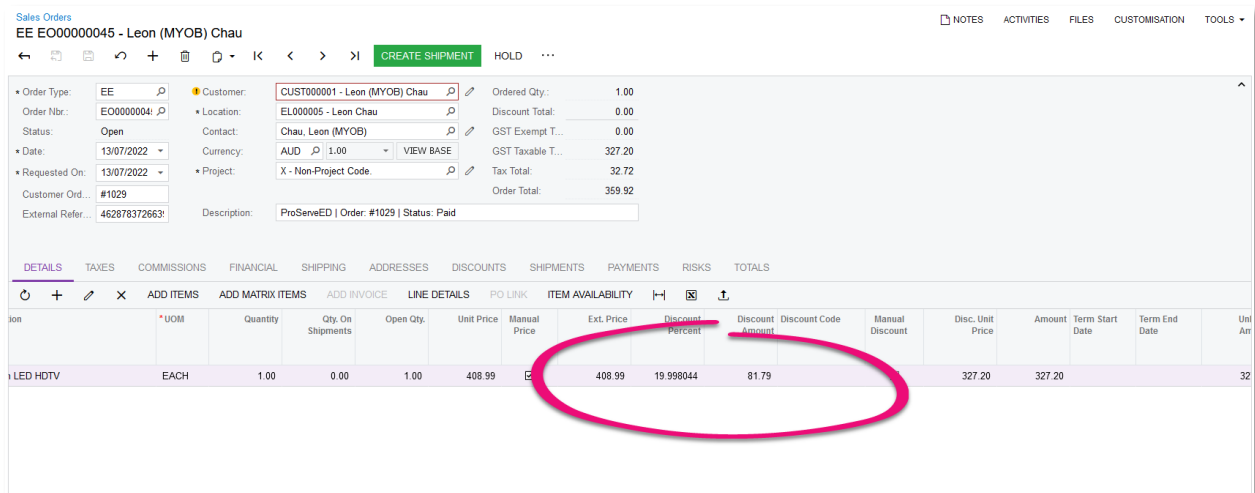
On the Shopify Stores, you have the option to show discount as a Line Discount or a Document Discount:



If you select Document Discount, when the Sales Order is synced to MYOB Advanced, the discount will be shown in the Discount tab of the Sales Order screen:



If you select Line Discount, when the Sales Order is imported into MYOB Advanced, the discount will be shown in the Details of the Sales Order:



Sales Order Processing – BigCommerce

In the example below, synchronisation has been turned on for the following entities:

- Customer
- Customer Location
- Sales Order
- Stock Item
- Shipment
- Payment
- Sales Category
- Stock Item
- Non-stock Items

Therefore, every time an entity is created/updated in either system, a corresponding entity is also created/updated in the other system.

Raising a Sales Order:

On the store front, the customers can browse through the product and add the product to Cart. After that, they would review the cart and checkout.

During checkout for BigCommerce, the customers can have an option to Check out as a Guest, or if they are an existing customer with the store, they can sign in and check out as an existing customer.

The difference between checking out as a guest and checking out as a customer is, if the end user checks out as a guest, when a Sales Order from BigCommerce is imported into MYOB Advanced, the system will insert the generic customer specified on the Order Settings tab of the BigCommerce store as the Customer ID on the Sales Order. If the end user checks out as a customer, and this customer exists in MYOB Advanced, the system will use the existing Customer ID on the Sales Order. If this is an existing customer in BigCommerce, but does not exist in MYOB Advanced, the system will create a Customer in MYOB Advanced using the Customer Class and Customer Numbering sequence specified in the Order Settings tab of the BigCommerce store.

In the below example, we will be checking out as a guest.

ProServe ED

1 Customer

Checking out as a **Guest**? You'll be able to save your details to create an account with us later.

Email Address

CONTINUE AS GUEST

Subscribe to our newsletter.

Already have an account? [Sign in now](#)

2 Shipping


3 Billing

4 Payment

Order Summary

[Edit Cart](#)

1 Item

	1 x AceKing 18.5inch Amoled Monitor	\$1,650.00
---	-------------------------------------	------------

Subtotal \$1,650.00

Shipping --

GST \$150.00

[Coupon/Gift Certificate](#)

Total (AUD) **\$1,650.00**

During checkout, you can add an Order Comment. This Order Comment when synced to MYOB Advanced will be come a Note on the Sales Order.

My billing address is the same as my shipping address.

Shipping Method

<input type="radio"/> Pickup In Store	\$0.00
<input checked="" type="radio"/> Free Shipping	\$0.00
<input type="radio"/> Standard AUSPOST	\$11.00
<input type="radio"/> Express Shipping AUSPOST	\$22.00

Order Comments

This is an order comment

CONTINUE

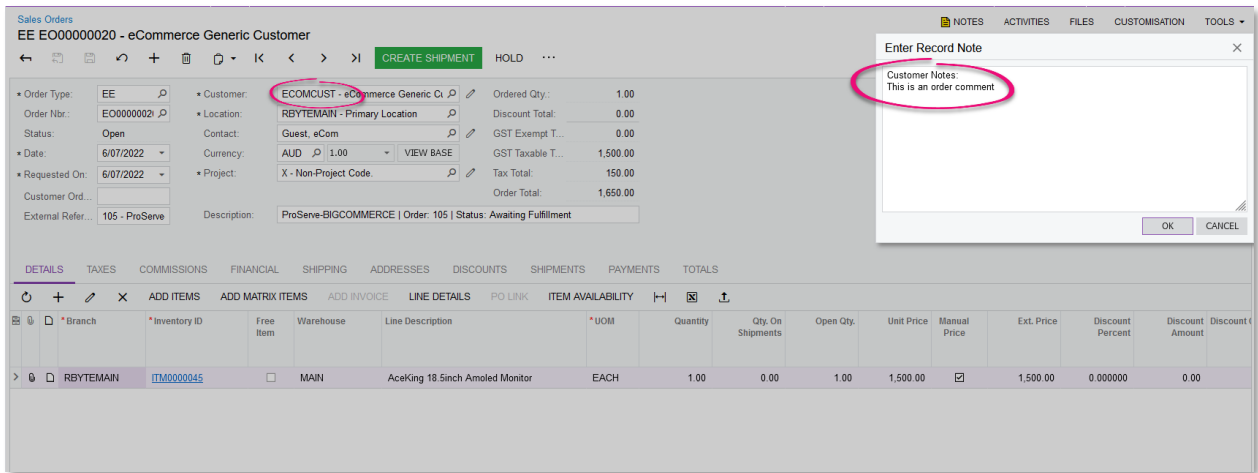
After the payment is captured, then a Sales Order is created in BigCommerce. You can view the Sales Order in the backend of BigCommerce with the Status “Awaiting Fulfillment”:

All Orders							
Awaiting Payment Awaiting Fulfillment Awaiting Shipment High Risk Pre-Orders More ▾ Custom Views							
<input type="button" value="Add"/> <input type="button" value="Export All"/> <input type="button" value="Choose an action"/> ▾ <input type="button" value="Confirm"/> <input type="text" value="Filter by Keyword"/> <input type="button" value="Filter"/> <input type="text" value="Search"/> View 20 ▾							
<input type="checkbox"/>	<input type="button" value="⊕"/>	Date ▾	Order ID	Customer	Status	Total	Action
<input type="checkbox"/>	<input type="button" value="⊕"/>	6th Jul 2022	105	Guest 003 Guest (Guest)	Awaiting Fulfillment ▾	\$1,650.00	<input type="button" value="📄"/> <input type="button" value="📅"/>
<input type="checkbox"/>	<input type="button" value="⊕"/>	6th Jul 2022	104	Leon (Guest) 002 Chau (Guest)	Awaiting Fulfillment ▾	\$1,650.00	<input type="button" value="📄"/> <input type="button" value="📅"/>
<input type="checkbox"/>	<input type="button" value="⊕"/>	5th Jul 2022	103	Leon Guest 001 Chau (Guest)	Shipped ▾	\$1,650.00	<input type="button" value="📄"/> <input type="button" value="📅"/>
<input type="checkbox"/>	<input type="button" value="⊕"/>	4th Jul 2022	102	Up Market Fisheries	Shipped ▾	\$790.00	<input type="button" value="📄"/> <input type="button" value="📅"/>
<input type="checkbox"/>	<input type="button" value="⊕"/>	1st Jul 2022	100	Up Market Fisheries	Completed ▾	\$680.00	<input type="button" value="📄"/>

Syncing the Sales Order:

If the synchronisation was set up correctly, this Sales Order will then be synced to MYOB Advanced (if you have Real-Time Sync turned on and Real-Time Mode is Prepare & Process, the Sales Orders will be imported immediately; If you don't have real time sync turn on, you need to Prepare Data and Process Data for the Sales Order to be imported).

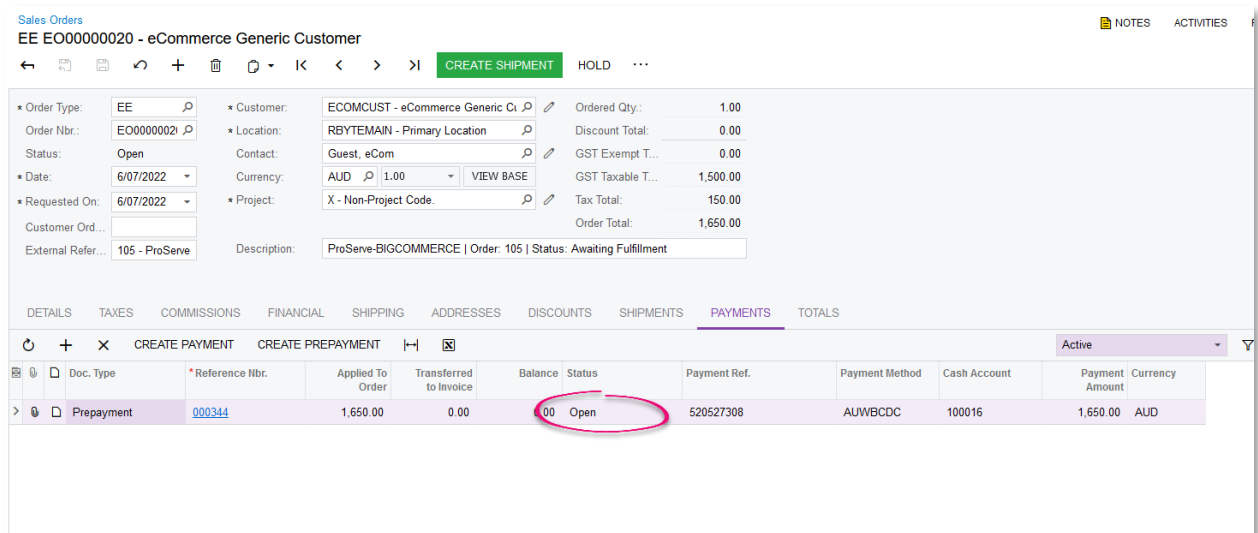
The Sales Order imported to MYOB Advanced looks like below:



Because we're checking out as a Guest, when imported to MYOB Advanced, the system uses the generic guest customer that we specified on the Orders Settings tab of the BigCommerce store. Also on this Sales Orders screen, the following fields are populated:

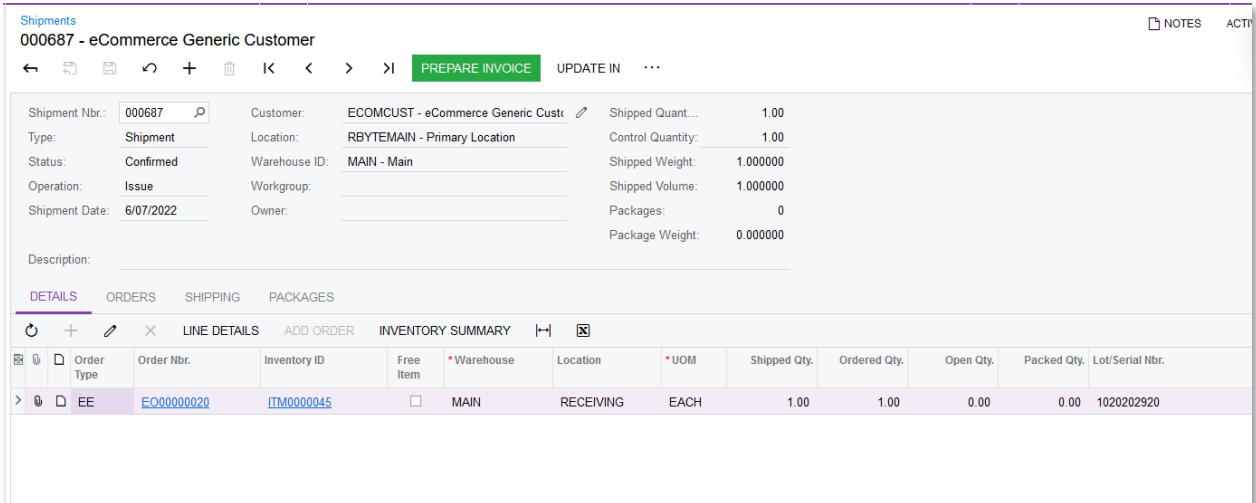
- Customer Order: populated with Shopify Order number
- External Reference: is populated with the External ID of the Sales Order Entity.
- Description: shows Store name, Order Number, and payment status.
- Order Comment is synced through as a Sales Order note.

In the Payments tab, the system automatically creates a Prepayment – in this example, the status of the Prepayment is “Open” because the field “Release Payment” of the Payment Method was set to true in the Payment Settings tab in the BigCommerce Store.

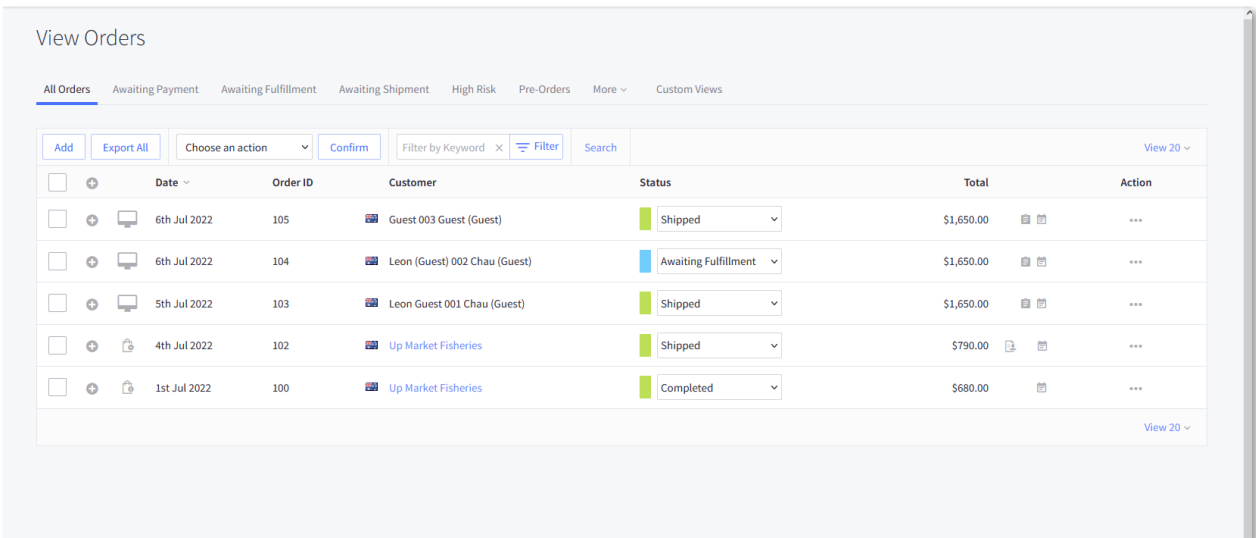


Fulfilling the Sales Order:

In MYOB Advanced, the warehouse employee will create a Shipment and Confirm the Shipment as usual:



When the Shipment is Confirmed, and synched to BigCommerce (through the Shipment Entity), the Status of the Sales Order in BigCommerce is changed to “Shipped”:



Preparing Invoice in MYOB Advanced:

In MYOB Advanced, if the Prepayment created from Shopify was released, then when the users Prepare Invoice and Release Invoice for a Sales Order after the Shipment has been confirmed, the Status of the SO Invoice becomes “Closed”. However, if the Prepayment was not released, then the status of the SO Invoice becomes “Open”. The users will have to manually apply the Prepayment on the SO Invoice to close it.

Processing Customer Refund (for unfulfilled orders)

To refund a Sales Order that not been fulfilled, go to the Orders list, select an order with the Status “Awaiting Fulfillment” – this order must have already been synced into MYOB Advanced. Select Refund:

View Orders

All Orders Awaiting Payment Awaiting Fulfillment Awaiting Shipment High Risk Pre-Orders More Custom Views

Add Export All Choose an action Confirm Filter by Keyword Filter Search View 20

Date	Order ID	Customer	Status	Total	Action
12th Jul 2022	112	Guest 2 Guest	Awaiting Fulfillment	\$1,672.00	<ul style="list-style-type: none"> Edit Order Print Invoice Print Packing Slip Resend Invoice Send Message View Notes Ship Items Refund View Order timeline

Billing

Guest 2 Guest
Guest 2 Guest
1877 Cremorne Street
Cremorne, Victoria 3121

Australia

guestcust002@myob.com

12 Jul 2022 08:06:29

203.34.100.2

ProServe ED (Manual Order)

Test Payment Provider

Paid

112

Manual Tax

Shipping

Guest 2 Guest
Guest 2 Guest
1877 Cremorne Street
Cremorne, Victoria 3121
Australia

Method

Express Shipping AUSPOST

\$22.00

N/A

Australia

Contact

Guest 2 Guest

N/A

guestcust002@myob.com

1 item

1 x AceKing 18.5inch Amoled Monitor
ITM0000045

Ship Items

Subtotal

Shipping

GRAND TOTAL

GST Included in Total

Specify the qty to refund, as well as the Shipping Cost, since you have not shipped this order yet:

Order summary

\$1,672.00	Shipping	\$20.00	Payment provider	Test Payment Provider
AWAITING FULFILLMENT	Tax	\$152.00	Paid by	Credit Card
Order date			Order source	Manual

Order date 12th Jul 2022

Refundable items

Refund individual items Refund entire order Apply an order level refund

Item	SKU	Quantity ordered	Unit price	Units to refund	Refund item total
AceKing 18.5inch Amoled Monitor	ITM0000045	1	\$1,500.00	1	\$1,500.00
Shipping cost	-	-	\$20.00	-	\$ 20

Cancel Continue

Select the Payment Method to refund and confirm:

Confirm refund (order 112)

If you're unable to refund an order, you will need to log into your payment gateway's dashboard to process the refund. [Learn More](#)

Refund summary

Item	SKU	Quantity ordered	Unit price	Units to refund	Refund item total
AceKing 18.5inch Amoled Monitor	ITM0000045	1	\$1,500.00	1	\$1,500.00
Shipping cost	-	-	\$20.00	-	\$20.00
			Refund subtotal		\$1,520.00
			Tax refund		\$152.00
			Refund total		\$1,672.00

Refund method

Please note: your online payment provider may have a settlement period before refunds can be processed. We recommend processing refunds for those providers after this period. [Learn about settlement period](#)

Select one of the methods below to complete your refund

Test Payment Provider: \$1,672.00
Funds will be returned via this payment provider.

Refund transaction processed external to BigCommerce
BigCommerce will not perform the refund because the amount was refunded directly through the payment provider.

Cancel Confirm Refund

BigCommerce will Refund the money to the original payment method of the customer.

In MYOB Advanced, the Refund Entity of the BigCommerce store does not support Real-Time sync, therefore you need for Prepare Data/Process Data for the Refund entity, either manually or through an Automation Schedule, to import the Refund from BigCommerce back to MYOB Advanced:

Prepare Data

PREPARE

Store: ProServe-BIGCOMMERCE Prepare Mode: Incremental Start Date: End Date:

Selected	Store	Entity	Sync Direction	Primary System	Last Error	Prepared Records	Processed Records	Last Increment Import
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Customer Price Class	Export	ERP		1	1	
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Customer	Bidirectional	External System		104	17	4/07/2022 2:3
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Sales Category	Export	ERP		0	2	
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Stock Item	Export	ERP		1	187	
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Non-Stock Item	Export	ERP		0	24	
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Template Item	Export	ERP		0	2	
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Base Sales Price	Export	ERP		0	107	
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Price List	Export	ERP		1	0	
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Product Image	Export	ERP		3	2	
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Product Availability	Export	ERP		0	123	
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Sales Order	Bidirectional	External System	Synchronization is already in progress for the 2811 record.	1	26	4/07/2022 2:3
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Payment	Import	External System		0	10	4/07/2022 2:3
<input type="checkbox"/>	ProServe-BIGCOMMERCE	Shipment	Export	ERP		0	7	
<input checked="" type="checkbox"/>	ProServe-BIGCOMMERCE	Refund	Import	External System		2	0	12/07/2022 7:

After the Refund has been imported, go back to the Sales Order, notice the Status of the Sales Order is now Cancelled:

Sales Orders
EE E000000036 - Guest 2 Guest

REOPEN ORDER COPY ORDER ...

* Order Type:	EE	Customer:	EE000008 - Guest 2 Guest	Ordered Qty.:	1.00
Order Nbr.:	E000000036	Location:	RBYTEMAIN - Guest 2 Guest	Discount Total:	0.00
Status:	Canceled	Contact:	Guest, Guest 2	GST Exempt T...:	0.00
Date:	12/07/2022	Currency:	AUD 1.00	GST Taxable T...:	1,500.00
Requested On:	12/07/2022	Project:	X - Non-Project Code.	Tax Total:	152.00
Customer Ord...:				Order Total:	1,672.00
External Refer...:	112 - ProServe	Description:	ProServe-BIGCOMMERCE Order: 112 Status: Refunded		

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS TOTALS

CREATE PAYMENT CREATE PREPAYMENT

Doc. Type	*Reference Nbr.	Applied To Order	Transferred to Invoice	Balance	Status	Payment Ref.	Payment Method	Cash Account	Payment Amount	Currency
Prepayment	000369	0.00	0.00	1,672.00	Open	112	AUWBDCDC	100016	1,672.00	AUD

Open the related Prepayment, select Actions > Refund to create a Customer Refund AR Document. Release this Customer Refund to complete the Customer Refund:

https://myobadvanceddemo-retail-commerce.myobadvanced.com/(W(10008))/pages/ar/ar302000.aspx?PopupPanel=On&CompanyID=

Payments and Applications
Prepayment 000369 - Guest 2 Guest

VOID ...

Type:	Prepayme...	Customer:	EE000008 - G	Processing	Inquiries
Reference Nbr.:	000369	Location:	RBYTEMAIN -	Remove Hold	Customer Details
Status:	Open	Payment Meth...:	AUWBDCDC - /	Hold	
* Post Date:	12/07/2022	Card/Account ...:		Release	Reports
* Post Period:	01-2023	Cash Account:	100016 - AUW	☆ Refund	AR Edit Detailed
Payment Ref.:	112	Currency:	AUD	Corrections	AR Register Detailed
		Description:	ProServe-BIGC	Void	

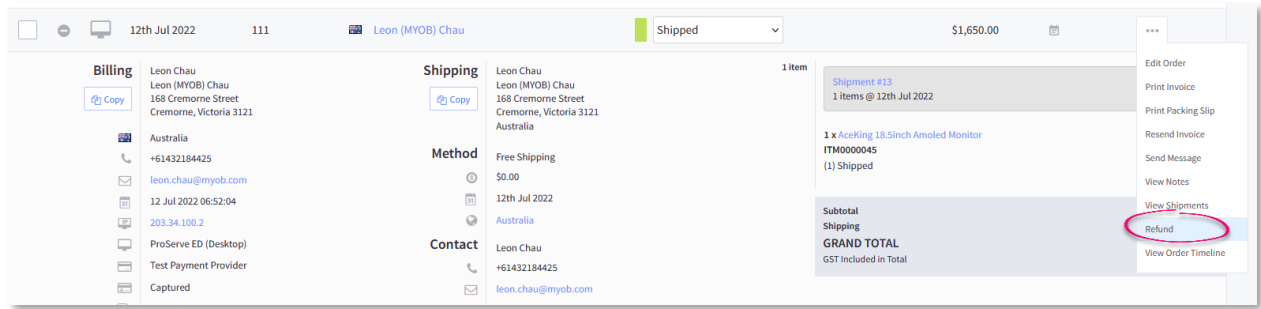
DOCUMENTS TO APPLY SALES ORDERS APPLICATION HISTORY FINANCIAL APPROVALS CHARGES

LOAD ORDERS

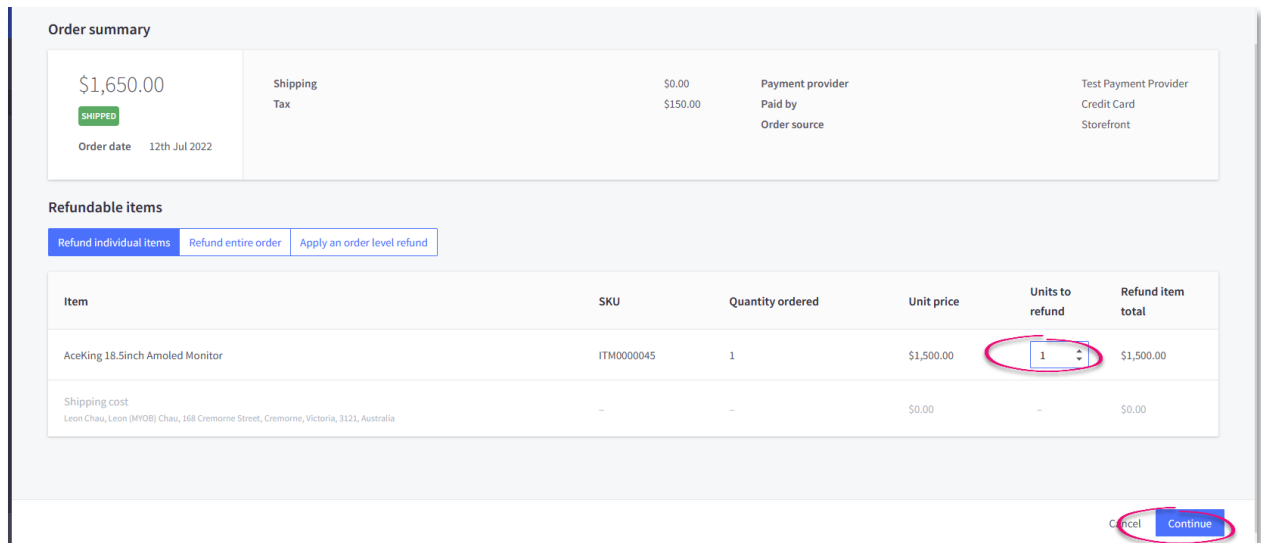
*Order Type	*Order Nbr.	Status	Applied To Order	Transferred to Invoice	Date	Due Date	Prompt Payment Disc. Date	Balance
EE	E000000036	Canceled	0.00	0.00	12/07/2022			1,672.00

Processing Customer Refund (for fulfilled orders)

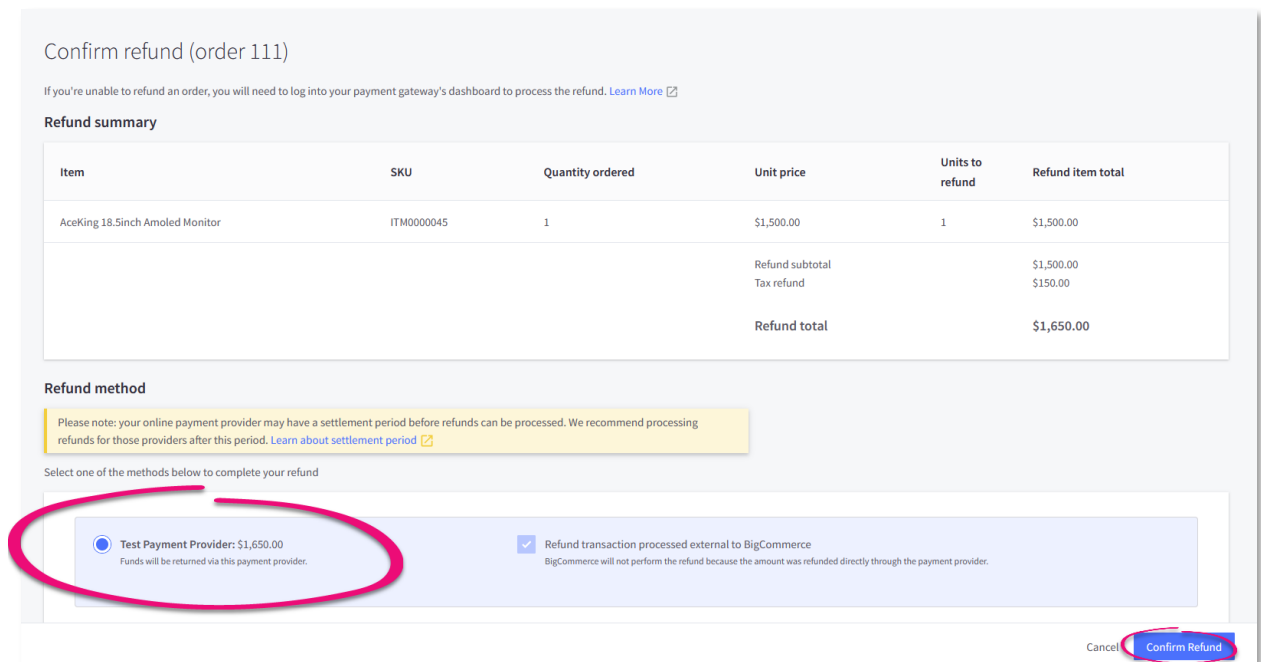
To create a refund for fulfilled order, select the order that has been shipped, and select Refund:



Specify the quantity to be refunded:



Specify the Payment Method to refund:



Prepare and Process Data for the Refund entity in MYOB Advanced, either manually or through an automation schedule. Once the Refund entity has been processed, go to the Sales Order list,

you'll notice a new RC order type has been created to process the refund for the customer – from here, select Create Receipt and confirm the resultant Shipment to bring the good back into Inventory:

Sales Orders
RC 001944 - Leon (MYOB) Chau

Order Type: RC
 Order Nbr.: 001944
 Status: Open
 Date: 12/07/2022
 Requested On: 12/07/2022
 Customer Ord.: 111
 External Refer.: 5 - ProServe-BI

Customer: CUST000001 - Leon (MYOB) Chau
 Location: EL000005 - Leon Chau
 Contact: Chau, Leon (MYOB)
 Currency: AUD 1.00
 Project: X - Non-Project Code

Ordered Qty.: 1.00
 Discount Total: 0.00
 GST Exempt T.: 0.00
 GST Taxable T.: 1,500.00
 Tax Total: 150.00
 Order Total: 1,650.00

Description: ProServe-BIGCOMMERCE | Order: 111 | Status: Refunded

Branch	Invoice Nbr.	Inventory ID	Free Item	Warehouse	Line Description	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Cost	Unit Price	Manual Price	Ext. Price
RBYTEMAIN		ITM0000045		MAIN	AceKing 18.5inch Amoled Monitor	EACH	1.00	0.00	1.00	1,053.75	1,500.00		1,500.00

When you Prepare Invoice for the Shipment, the system generates a Credit Memo for the Refund amount:

Invoices
Credit Memo 001945 - Leon (MYOB) Chau

Type: Credit Me...
 Reference Nbr.: 001945
 Status: Open
 Date: 12/07/2022
 Post Period: 01-2023
 Customer Ord.: 111
 Project/Contract: X - Non-Project Code
 Description: ProServe-BIGCOMMERCE | Order: 111 | Status: Refunded

Customer: CUST000001 - Leon (MYOB) Chau
 Location: EL000005 - Leon Chau
 Currency: AUD 1.00
 Terms:
 Due Date:
 Prompt Payme...:
 Balance: 1,650.00
 Amount: 1,650.00
 Prompt Payme...: 0.00

Detail Total: 1,500.00
 Discount Total: 0.00
 GST Taxable T.: 1,500.00
 GST Exempt T.: 0.00
 Tax Total: 150.00
 Write-Off Total: 0.00

Branch	Shipment Nbr.	Inventory ID	Transaction Descr.	Warehouse	Location	Quantity	UOM	Lot/Serial Nbr.	Expiration Date	Unit Price	Ma Pr
RBYTEMAIN	000699	ITM0000045	AceKing 18.5inch Amoled Monitor	MAIN	RMA	1.00	EACH	123123213		1,500.00	

In the Payments and Applications screen AR302000, you can select the Credit Memo, and select Actions > Refund. Release the resultant Customer Refund to complete the Refund process:

Payments and Applications
Credit Memo 001945 - Leon (MYOB) Chau

Type: Credit Me...
 Reference Nbr.: 001945
 Status: Open
 Date: 12/07/2022
 Post Period: 01-2023

Customer: CUST000001 - Leon (MYOB) Chau
 Location: EL000005 - Leon Chau
 Currency: AUD 1.00

Description: ProServe-BIGCOMMERCE | Order: 111 | Status: Refunded

Processing
 Remove Hold
 Hold
 Release
 Refund

Inquiries
 Customer Details

Reports
 AR Edit Detailed
 AR Register Detailed

Branch	Doc. Type	Reference Nbr.	Line Nbr.	Inventory ID	Project	Project Task	Cost Code	Account	Customer	Amount Paid	Cash Discount Taken	Write-Off Amount	Write-Off Reason Code	Date
--------	-----------	----------------	-----------	--------------	---------	--------------	-----------	---------	----------	-------------	---------------------	------------------	-----------------------	------

Payments and Applications

Customer Refund 000371 - Leon (MYOB) Chau

NOTES ACTIVITY

← ↻ 📄 ↶ + 🗑️ ↷ K < > >| VOID ...

Type: Customer ... Customer: CUST000001 - Leon (MYOB) Chau Payment Amo... 1,650.00

Reference Nbr.: 000371 Location: EL000005 - Leon Chau Applied to Doc... 0.00

Status: Closed Payment Meth... AUWBDCD - AU Westpac Banking Corp Applied to Ord... 0.00

Post Date: 12/07/2022 Card/Account ... AU Westpac Banking Corporation Format Available Bala... 0.00

Post Period: 01-2023 Cash Account: 100016 - AU WBC Bank Corp Account H Write-Off Amo... 0.00

Payment Ref.: 123123 Currency: AUD 1.00 VIEW BASE Finance Charg... 0.00

Deducted Char... 0.00

Description: ProServe-BIGCOMMERCE | Order: 111 | Status: Refunded

DOCUMENTS TO APPLY SALES ORDERS APPLICATION HISTORY FINANCIAL APPROVALS CHARGES

REVERSE APPLICATION

Branch	Batch Number	Doc. Type	Reference Nbr.	Line Nbr.	Inventory ID	Project	Project Task	Cost Code	Account	Customer	Amount Paid
RBYTEMAN	004956	Credit Memo	001945	0						CUST000001	1,650.00

Discounts

In BigCommerce, you can define different type of discounts, such as Shipping Discounts, Product Discounts, Order Discounts, etc. These discounts are set up in Marketing > Promotions.

ProServe ED

Your trial ends today. Select a Plan

Create Automatic Promotion

Promotion Details

Promotion Name: 20% off for Sam 32-Inch LED HDTV

Currency: AUD - Australian Dollars

Choose a Promotion Type: Product discount

What type of promotion are you running?

Buy one get one free
 Buy one get something else free
 Buy (X units) of Product A, get (Y units) of Product B for amount or % off per unit
 Apply an amount or % off to Product X
 The customer will get 1 Sam 32-Inch LED HDTV for 20 % off per unit

Customer Groups: All customers

Which customers should receive this discount?

All customers
 Only customers within the following customer groups:

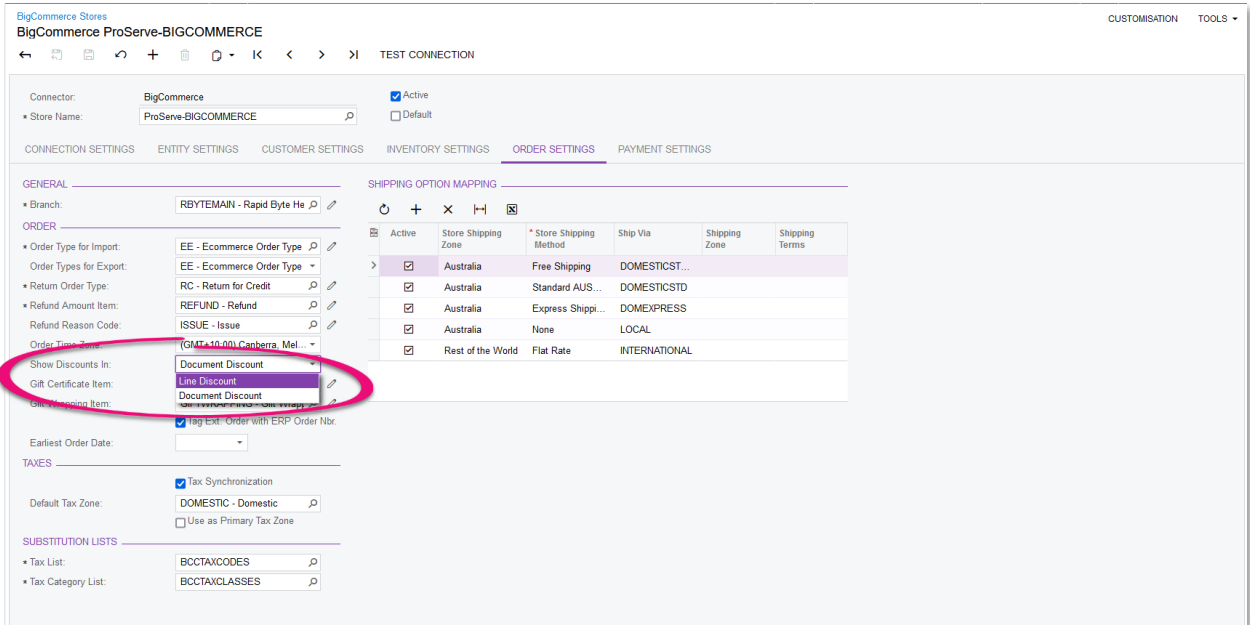
Duration: Start date: Wed, 13 Jul, 2022 12:00 am Add end date

Western Europe Time, London, Lisbon, Casablanca (GMT)

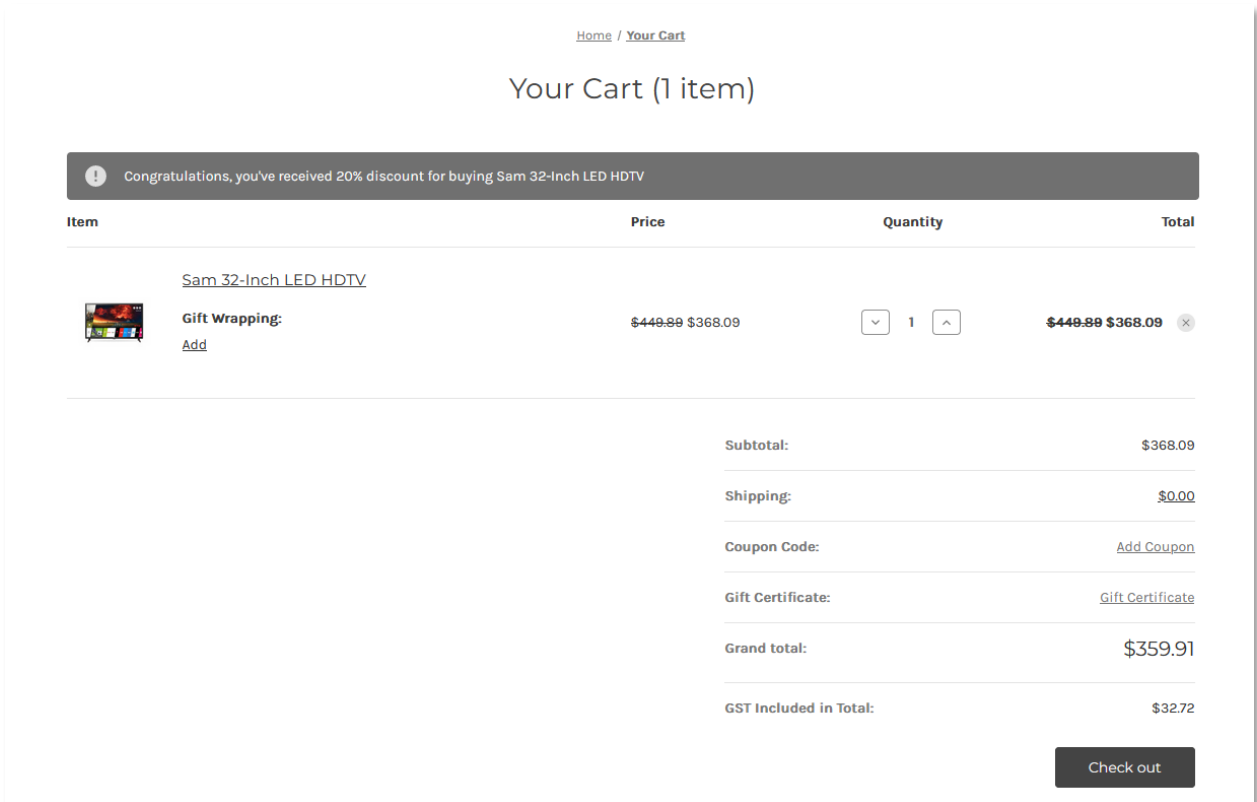
Limit the usage of this discount

Cancel Save

In the BigCommerce Stores screen, you can specify whether you would like the discount to show as a Line Discount or as Document Discount:



After the discount is configured, when the user checks out, they can see the discounted price for the item that they have added to cart:



If you select Document Discount on the BigCommerce store screen, when a Sales Order is synced to MYOB Advanced, the discount is shown in the Discount tab of the Sales Order:

Sales Orders
EE EO00000042 - Leon (MYOB) Chau

← → ↺ ↻ + - 🗑️ 📄 ⌂ 🔍 CREATE SHIPMENT HOLD ...

Order Type: EE Customer: CUST000001 - Leon (MYOB) Chau Ordered Qty.: 1.00
 Order Nbr.: EO00000042 Location: EL000005 - Leon Chau Discount Total: 81.80
 Status: Open Contact: Chau, Leon (MYOB) GST Exempt T...: 0.00
 Date: 13/07/2022 Currency: AUD 1.00 VIEW BASE GST Taxable T...: 408.99
 Requested On: 13/07/2022 Project: X - Non-Project Code Tax Total: 32.72
 Customer Ord.: Order Total: 359.91
 External Refer...: 116 - ProServe Description: ProServe-BIGCOMMERCE | Order: 116 | Status: Awaiting Fulfillment

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS TOTALS

Disable Automatic Discount Update

Ship Discount	Line Nbr.	Discount Code	Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Discount Percent	Free Item	Free Item Qty.	External Discount Code	Description
<input type="checkbox"/>	1			External Document	<input checked="" type="checkbox"/>	408.99		81.80	20.000489			Manual	Discounts applied: 1

If you select Line Discount on the BigCommerce store screen, when a Sales Order is synced to MYOB Advanced, the discount is shown in the Details Line:

Sales Orders
EE EO00000043 - Leon (MYOB) Chau

← → ↺ ↻ + - 🗑️ 📄 ⌂ 🔍 CREATE SHIPMENT HOLD ...

Order Type: EE Customer: CUST000001 - Leon (MYOB) Chau Ordered Qty.: 1.00
 Order Nbr.: EO00000043 Location: EL000005 - Leon Chau Discount Total: 0.00
 Status: Open Contact: Chau, Leon (MYOB) GST Exempt T...: 0.00
 Date: 13/07/2022 Currency: AUD 1.00 VIEW BASE GST Taxable T...: 408.99
 Requested On: 13/07/2022 Project: X - Non-Project Code Tax Total: 32.72
 Customer Ord.: Order Total: 359.91
 External Refer...: 117 - ProServe Description: ProServe-BIGCOMMERCE | Order: 117 | Status: Awaiting Fulfillment

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS TOTALS

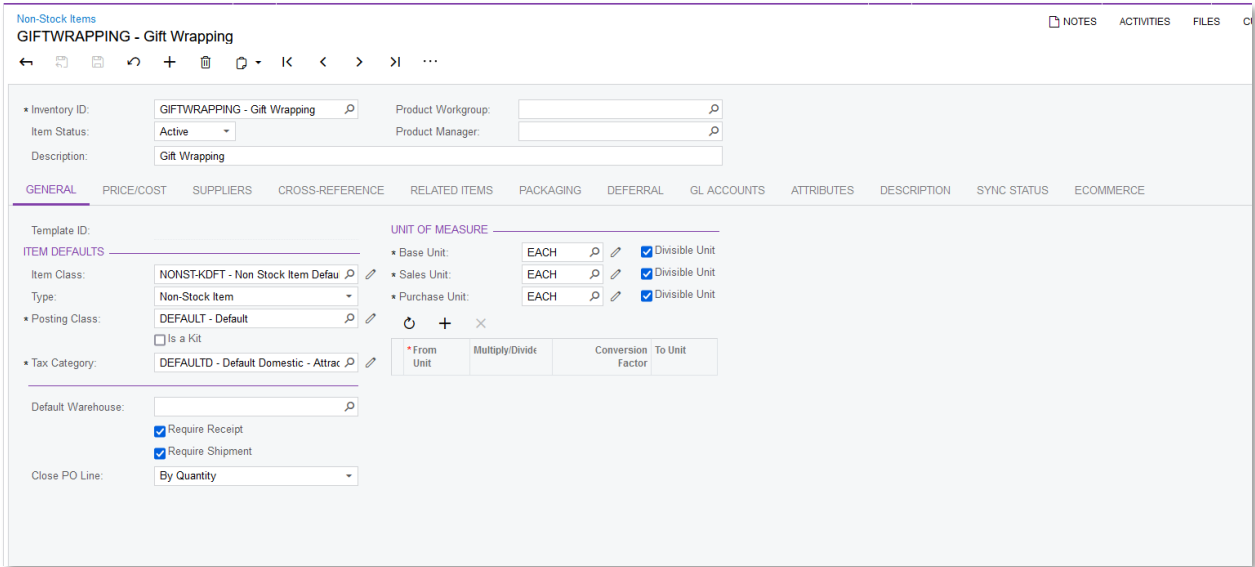
ADD ITEMS ADD MATRIX ITEMS ADD INVOICE LINE DETAILS PO LINK ITEM AVAILABILITY

UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price	Discount Percent	Discount Amount	Discount Code	Manual Discount	Disc. Unit Price	Amount	Term Start Date	Term End Date	Unbilled Amount	Requested On
EACH	1.00	0.00	1.00	408.99	<input checked="" type="checkbox"/>	408.99	20.000489	81.80		<input checked="" type="checkbox"/>	327.19	327.19			327.19	13/07/2022

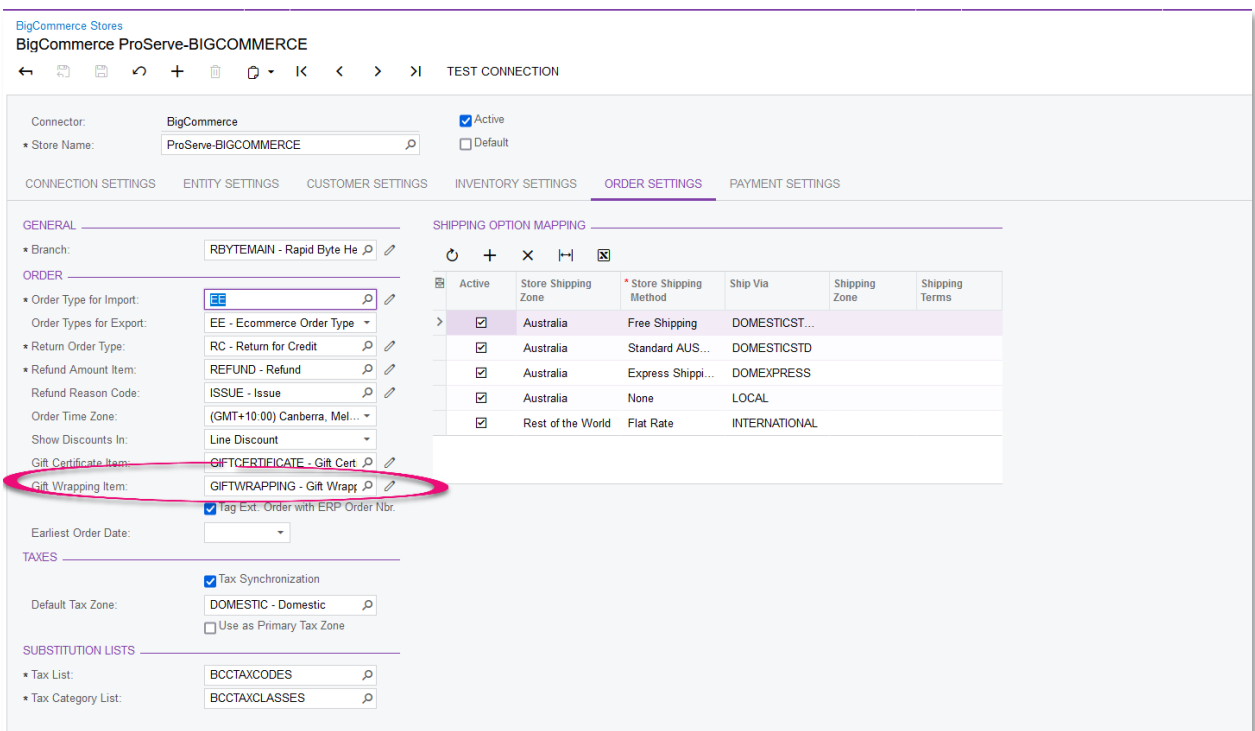
Gift Wrapping and Gift Message

Gift Wrapping and Gift Message are BigCommerce specific features. During the checkout, customers can decide whether they would like to wrap the purchased item as a gift and add personalized message. The gift wrapping service can be charge to the customer for an additional fee.

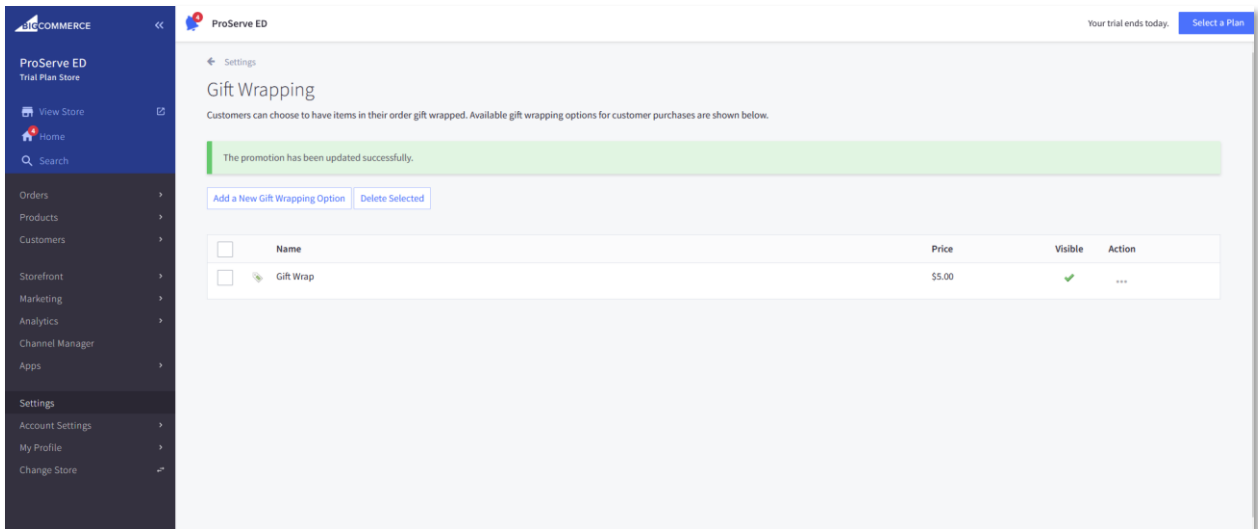
To configure Gift Wrapping, you need to first create a Non-Stock Item that represents the Gift Wrapping service. Make sure to tick Require Receipt/Require Shipment:



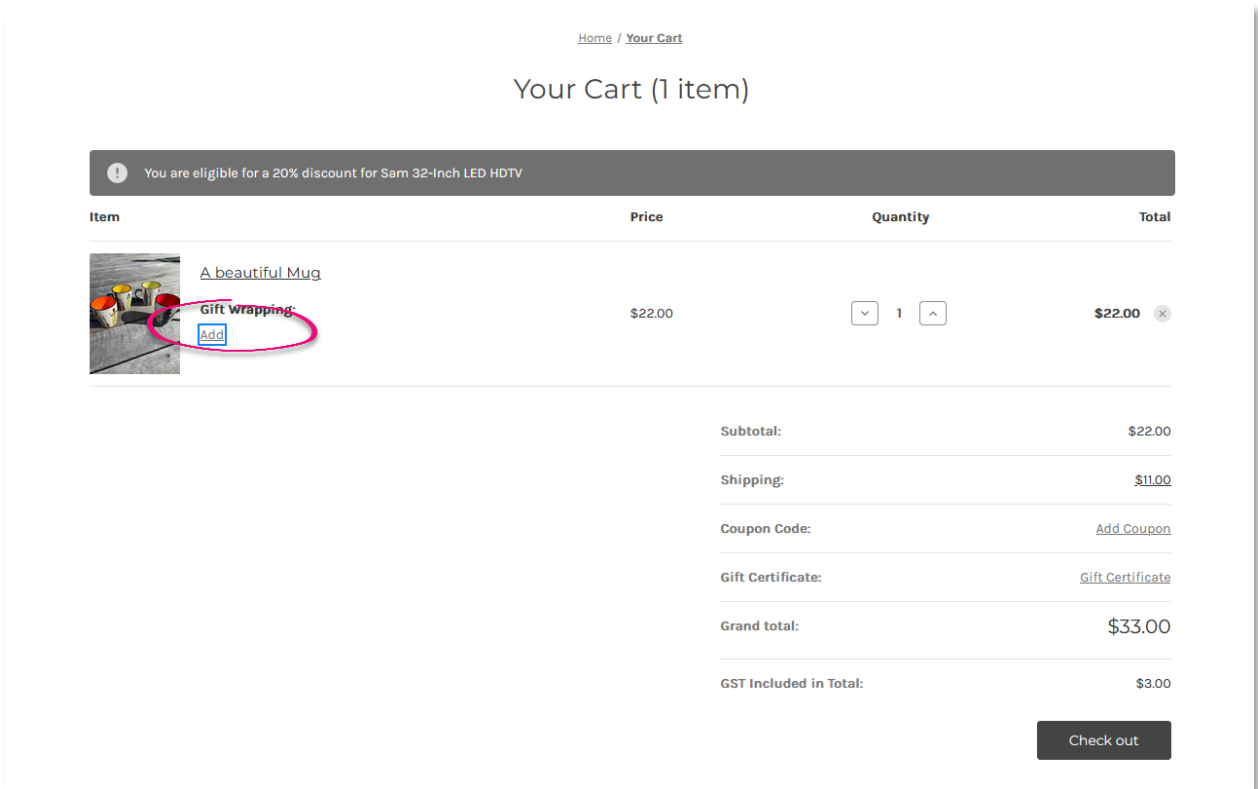
Then, you need to specify the Gift Wrapping non-stock item on the Order Settings tab of the BigCommerce store:



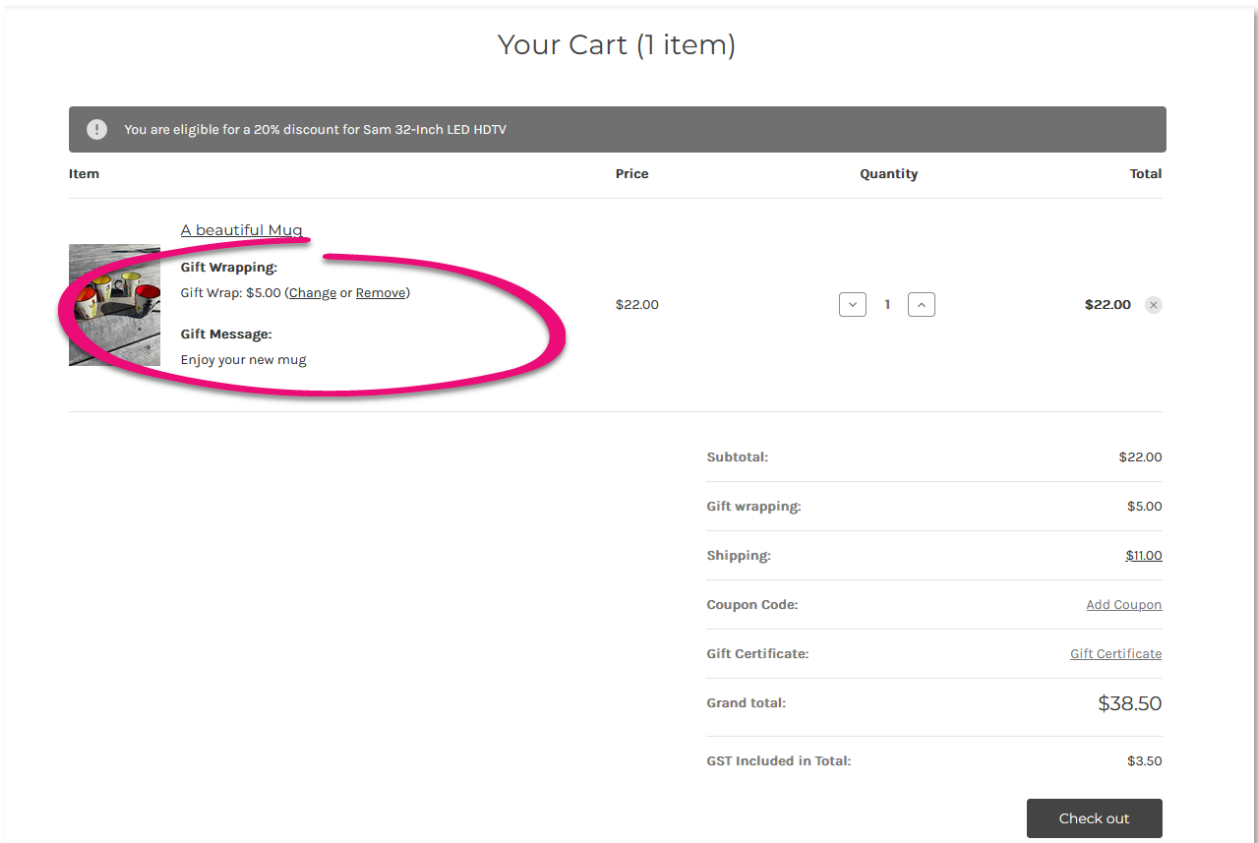
In BigCommerce, set up Gift Wrapping under Settings > Gift Wrapping – here you can specify the amount to be charged for the giftwrapping service:



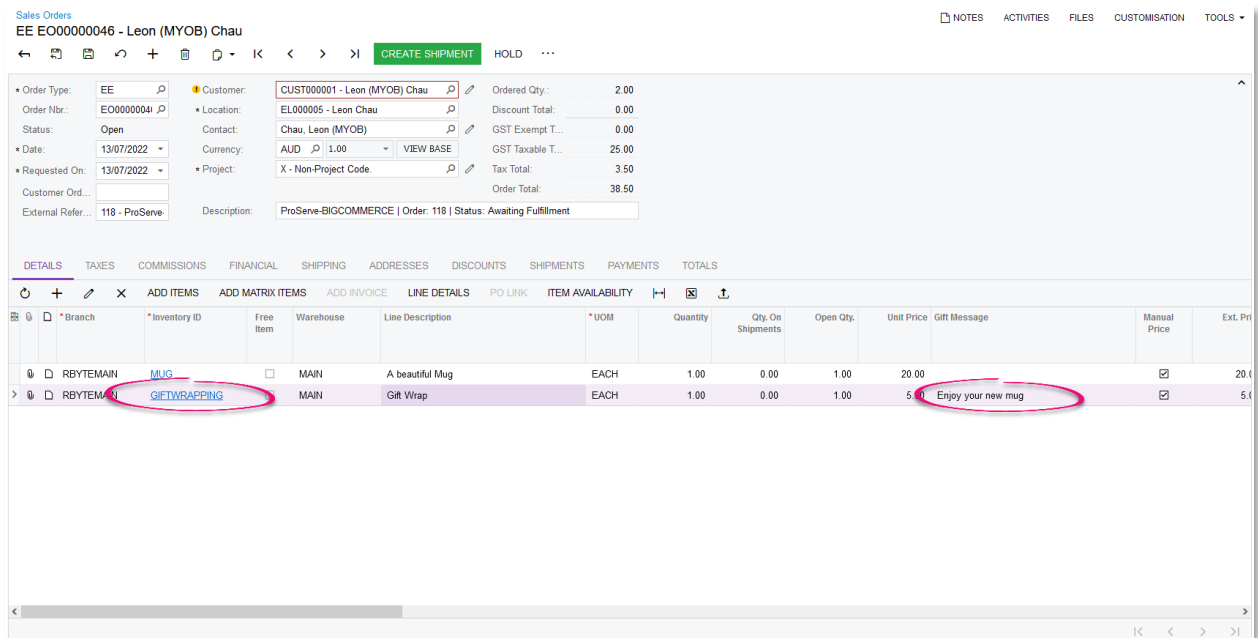
During checkout, customer has the option to Add giftwrapping service:



They can also add a personalized message if required:



When the Sales Order is synced to MYOB Advanced, the system inserts the Gift Wrap non-stock item into the Sales Order, and the Gift Wrap message is shown in the Gift Wrap message field:



Gift Certificate/Gift Card

The Commerce Connector supports Gift Certificate both in BigCommerce and Shopify. In the storefront, customers can buy and pay for the Gift Certificate, and later use the Gift Certificate as

a payment method for their future purchases. The Gift Certificate is configured as a non-stock item, linked to a Liability GL account to hold the customer's Gift Certificate balance, and also linked to a Cash Account and a Payment Method, that can be used to pay the Sales Order.

Configure Gift Certificate in MYOB Advanced

Firstly, we need to create a GL Account of type Liability to accrue the revenue of sold Gift Certificates:

Chart of Accounts

MANAGE RESTRICTION GROUPS

Account	Account Class	Type	Active	Description	Control Account Module	Allow Manual Entry	Post Option	Cash Account	Currency	Rev Rat
200608	OTHCURLIAE	Liability	<input checked="" type="checkbox"/>	Customer Gift Card		<input type="checkbox"/>	Summary	<input type="checkbox"/>		

Then create a Cash Account, link to the GL Account that we just created to represent payment by Gift Certificate:

Cash Accounts

200608 - Customer Gift Card

* Cash Account: 200608 - Customer Gift Card

Active

* Account: 200608 - Customer Gift Card

* Subaccount: 000-000-000 - Default

* Branch: RBYTEMMAIN - Rapid Byte He

Currency: AUD

Curr. Rate Type:

* External Ref. Number: Gift Card

Description: Customer Gift Card

Clearing Account

Requires Reconciliation

Restrict Visibility with Branch

Match Bank Transactions to Batch Payments

Use for Corporate Cards

Reconciliation Numbering Sequ...

Bank ID:

Statement Import Service: PX.Objects.CA.OFXStater

PAYMENT METHODS CLEARING ACCOUNTS ENTRY TYPES SIGNATURE

* Payment Method	Use in AP	API Payroll Default	AP - Suggest Next Number	AP Last Reference Number	Batch Last Reference Number	Use in Payroll	Use in AR	AR Default	AR Default For Refund	AR - Suggest Next Number	AR Last Reference Number

Next, we need to create a Payment Method linked to the above Cash Account:

Payment Methods
GIFTCARD - Gift Card Payment for eCommerce

Use in AP
 Active
 Use in AR
 Contains Personal Data
 Use in Payroll
 Means of Payment: **Cash/Cheques**
 Require Remittance Information for Cash Account
 * Description: **Gift Card Payment for eCommerce**

ALLOWED CASH ACCOUNTS SETTINGS FOR USE IN AR

* Cash Account	Description	Branch	Use in AR	AR Default	AR Default For Refund	AR - Suggest Next Number	AR Last Reference Number
> 200608	Customer Gift Card	RBYTEMAIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

We also need to create a Non-Stock Item to represent the Gift Certificate purchased through the storefront. When the customer purchase the gift card through Shopify or BigCommerce, a Sales Order will be created, this Non-Stock Item Gift Certificate will be added to the Sales Order. Make sure that Sales GL Account of this non-stock item is set to the liability account that we have configured above, so that the customer gift card balance is charged to that liability account.

Non-Stock Items
GIFTCERTIFICATE - Gift Certificate

* Inventory ID: **GIFTCERTIFICATE - Gift Certificate** Product Workgroup:
 Item Status: **Active** Product Manager:
 Description: **Gift Certificate**

GENERAL PRICE/COST SUPPLIERS CROSS-REFERENCE RELATED ITEMS PACKAGING DEFERRAL **GL ACCOUNTS** ATTRIBUTES DESCRIPTION SYNC STATUS ECOMMERCE

Expense Accrual Account: **200608**
 Expense Accrual Sub.: **000-000-000 - Default**
 Reason Code Sub.:
 * Expense Account: **500100 - Cost of Goods Sold**
 * Expense Sub.: **000-000-000 - Default**
 PO Accrual Account: **200600 - PO Accrual**
 PO Accrual Sub.: **000-000-001 - Franchisee 1**
 Sales Account: **200608 - Customer Gift Card**
 Sales Sub.: **000-000-001 - Franchisee 1**
 Purchase Price Variance Account:
 Purchase Price Variance Sub.:
 Deferral Account:
 Deferral Sub.:

Finally, on the Shopify Store/BigCommerce Store, link the store's gift card payment method to the above Payment Method and Cash Account:

Shopify Stores
Shopify ProServeED

← 📄 📄 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩ TEST CONNECTION

Connector: Shopify Active
 * Store Name: ProServeED Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS ORD

🔄 + × ↔️ 🗑️

Active	* Store Payment Method	* Store Currency	Payment Method ID	Cash Account
<input checked="" type="checkbox"/>	CASH ON DELIVERY (COD)	AUD	CASH	100016
<input checked="" type="checkbox"/>	GIFT_CARD	AUD	GIFTCARD	200608
<input checked="" type="checkbox"/>	MANUAL	AUD	CASH	100016
<input checked="" type="checkbox"/>	SHOPIFY_PAYMENTS	AUD	AUWBCDC	100016

Enable Gift Certificate/Gift Card feature in the stores

Before you can allow customer to purchase and use gift card, you need to enable the Gift Card feature in the stores. In Shopify, this is done through Store Settings > Gift Card:

Settings ProServe.ED proserve-ed.myshopify.com

- Store details
- Plan
- Billing
- Users and permissions
- Payments
- Checkout and accounts
- Shipping and delivery
- Taxes and duties
- Locations
- Gift cards**
- Markets
- Apps and sales channels
- Domains
- Brand

Gift cards Save

Auto-expiration
Set your gift cards to expire a certain amount of time after they've been purchased.

Gift cards never expire
 Gift cards expire

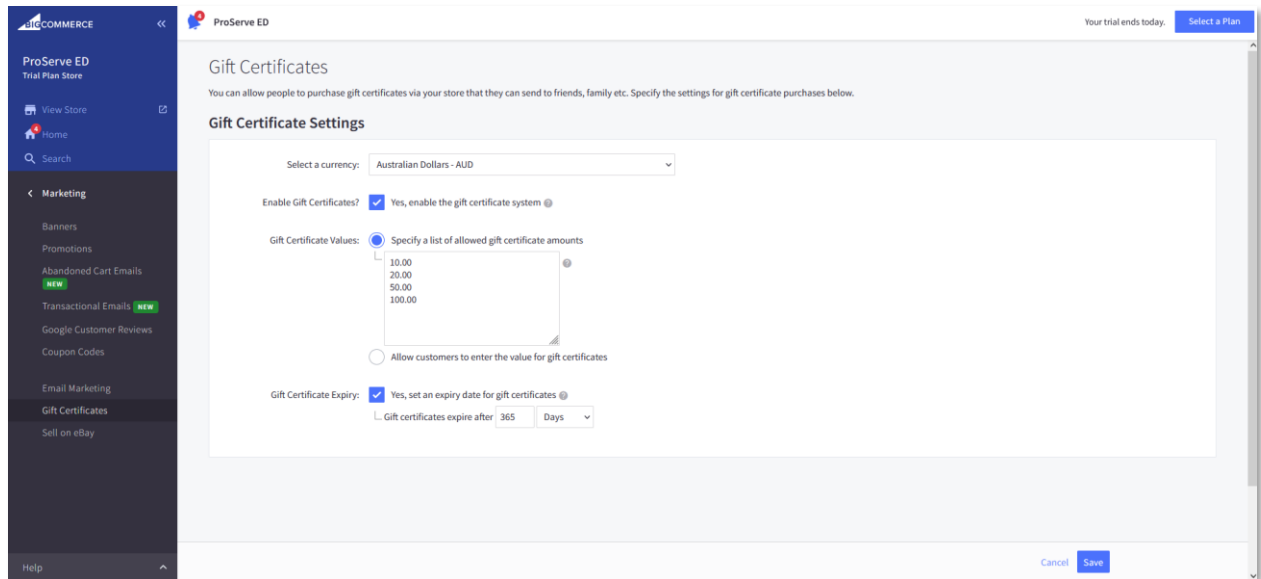
5 Years

Countries have different laws for gift card expiry dates. Check the laws for your country before changing this date.

Apple Wallet
Give your customers a digital gift card to use online or in your retail stores. [Learn more about Apple Wallet Passes.](#)

Enable Apple Wallet Passes Save

In BigCommerce, this is done through Marketing > Gift Certificates:



Buying a Gift Certificate/Gift Card

From the storefront, the customer can purchase a Gift Certificate just like any other products:

[Home](#) / [Gift Certificates](#)

Gift Certificates

[Purchase Gift Certificate](#)
 [Redeem Gift Certificate](#)
 [Check Gift Certificate Balance](#)

Your Name REQUIRED

Your Email REQUIRED

Recipient's Name REQUIRED

Recipient's Email REQUIRED

Amount REQUIRED

I understand that Gift Certificates expire after 365 days

I agree that Gift Certificates are nonrefundable

Optional Message

Enjoy your gift

Gift Certificate Theme REQUIRED

Birthday

Boy

Celebration

The Gift Certificate is synced to MYOB Advanced as a Sales Order, containing the Gift Certificate non-stock item, with the unit price equals to the value of the gift card:

Sales Orders

EE EO00000039 - Leon (MYOB) Chau

[CREATE SHIPMENT](#)
 [HOLD](#)
 ...

Order Type: EE	Customer: CUST000001 - Leon (MYOB) Chau	Ordered Qty.: 0.00
Order Nbr.: EO00000039	Location: EL000005 - Leon Chau	Discount Total: 0.00
Status: Open	Contact: Chau, Leon (MYOB)	GST Exempt T...: 0.00
Date: 13/07/2022	Currency: AUD 1.00	GST Taxable T...: 0.00
Requested On: 13/07/2022	Project: X - Non-Project Code	Tax Total: 0.00
Customer Ord.:		Order Total: 100.00
External Refer.: 113 - ProServe	Description: ProServe-BIGCOMMERCE Order: 113 Status: Completed	

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price	Discount Percent	Discount Amount
RBYTEMAIN	GIFTCERTIFICATE		MAIN	\$100.00 Gift Certificate	EACH	1.00	0.00	0.00	100.00		100.00	0.000000	0.00

When the AR Invoice is released, the Balance of the Gift Card is charged to the Liability account:

Journal Transactions

AR 004961 - ProServe-BIGCOMMERCE | Order: 113 | Status: Completed

NOTES ACTIVITIES FILES CUSTOMISATION TOOLS

Module: AR Branch: RBYTEMAN - Rapid Byte Head Quarters Type: Normal

Batch Number: 004961 Ledger: ACTUAL - Actual Source:

Status: Posted Currency: AUD 1.00 Franchise Name:

Transaction Date: 13/07/2022 Auto Reversing Reversing Entry Orig. Batch Number:

Post Period: 01-2023 Debit Total: 100.00

Description: ProServe-BIGCOMMERCE | Order: 113 | Status: Completed Credit Total: 100.00

*Branch	*Account	Description	**Subaccount	Project/Contract	Project Task	Cost Code	Ref. Number	Transaction Date	Quantity	UOM	Debit Amount	Credit Amount	Transaction Description	Non Billable
RBYTEMAN	100201	Account Receivable - Local	000-000-000	X		0000	001946	13/07/2022	0.00		100.00	0.00	ProServe-BIGCOMMERCE Order: 113 St...	<input type="checkbox"/>
RBYTEMAN	200608	Customer Gift Card	000-000-000	X		0000	001946	13/07/2022	1.00	EACH	0.00	100.00	\$100.00 Gift Certificate	<input type="checkbox"/>

Redeeming a Gift Certificate/Gift Card

During checkout, the customer can apply gift card to redeem it:

ProServe ED

Customer leon.chau@myob.com [Sign Out](#)

Shipping

Shipping Address

Leon Chau
Leon (MYOB) Chau +61432184425
168 Cremorne Street
Cremorne, Victoria, 3121 / Australia

My billing address is the same as my shipping address.

Shipping Method

Pickup In Store **\$0.00**


Standard AUSPOST **\$11.00**

Express Shipping AUSPOST **\$22.00**

Order Comments

Order Summary [Edit Cart](#)

1 Item

 1 x A beautiful Mug \$22.00

Subtotal \$22.00
Shipping \$11.00
GST \$3.00

[Coupon/Gift Certificate](#)

013-STR-FI7-D79 [APPLY](#)

Total (AUD) **\$33.00**

When the Sales Order is synced to MYOB Advanced, you can see that the system picks up the Gift Card Payment Method and use that for the Prepayment:

Sales Orders
EE E00000041 - Leon (MYOB) Chau

CREATE SHIPMENT HOLD ...

Order Type: EE Customer: CUST000001 - Leon (MYOB) Chau Ordered Qty.: 1.00
 Order Nbr.: E0000004 Location: EL000005 - Leon Chau Discount Total: 0.00
 Status: Open Contact: Chau, Leon (MYOB) GST Exempt T...: 0.00
 Date: 13/07/2022 Currency: AUD 1.00 VIEW BASE GST Taxable T...: 20.00
 Requested On: 13/07/2022 Project: X - Non-Project Code Tax Total: 3.00
 Customer Ord... Order Total: 33.00
 External Refer...: 115 - ProServe Description: ProServe-BIGCOMMERCE | Order: 115 | Status: Awaiting Fulfillment

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS TOTALS

CREATE PAYMENT CREATE PREPAYMENT

Doc. Type	Reference Nbr.	Applied To Order	Transferred to Invoice	Balance	Status	Payment Ref.	Payment Method	Cash Account	Payment Amount	Currency
Prepayment	000377	33.00	0.00	0.00	Open	523525838	GIFTCARD	200608	33.00	AUD

This reduces the Gift Card liability in the GL Account that we use to hold the Gift Card balance:

Journal Transactions
AR 004965 - ProServe-BIGCOMMERCE | Payment Method: GIFTCERTIFICATE (GIFT_CERTIFICATE) (013-STR-F17-D79) | Order: 115 | Payment ID: 523525838

Module: AR Branch: RBYTEMAN - Rapid Byte Head Quarters Type: Normal
 Batch Number: 004965 Ledger: ACTUAL - Actual Source:
 Status: Posted Currency: AUD 1.00 VIEW BASE Franchisee Name:
 Transaction Date: 13/07/2022 Auto Reversing Reversing Entry Orig. Batch Number:
 Post Period: 01-2023 Debit Total: 33.00
 Description: ProServe-BIGCOMMERCE | Payment Method: GIFTCERTIFICATE (GIFT_CERTIFIC Credit Total: 33.00

VIEW SOURCE DOCUMENT RECLASSIFICATION HISTORY

Branch	Account	Description	Subaccount	Project/Contract	Project Task	Cost Code	Ref. Number	Transaction Date	Quantity	UOM	Debit Amount	Credit Amount	Transaction Description	Non Billable
RBYTEMAN	200608	Customer Gift Card	000-000-000	X		0000	000377	13/07/2022	0.00		33.00	0.00	ProServe-BIGCOMMERCE Payment Met...	
RBYTEMAN	100201	Account Receivable - Local	000-000-001	X		0000	000377	13/07/2022	0.00		0.00	33.00	ProServe-BIGCOMMERCE Payment Met...	

Customer Pricing, Bulk Pricing, and Pricing Limitation (BigCommerce Only)

Customer Pricing

BigCommerce allows users to create different customer groups, and therefore support customer specific pricing.

In order for the store's customer to receive customer pricing, the following condition must be met:

- The customer record must have been synced in MYOB Advanced
- The customer must have a customer price group in MYOB Advanced
- Customer specific pricing must have been set up in MYOB Advanced (through the Sales Price screen or through the Sales Price worksheet)
- The customer must log in at the storefront to see the customer specific price.

- The storefront must be on the BigCommerce's Enterprise subscription plan.

BigCommerce essentials

WHY BIGCOMMERCE? CUSTOMERS PRICING RESOURCES GET STARTED

MOST POPULAR

Standard \$29.95/mo
Plus \$79.95/mo
Pro \$299.95/mo
Enterprise

Monthly Annual

Save up to 10% when you pay annually. Offer available for Plus and Pro plans.

Sell online with your own beautiful online store
Grow your online business with marketing tools proven to increase conversion
Scale your growing business with a comprehensive set of features
Power your team's success with the best full-service open platform

Included in all plans

Feature	Standard	Plus	Pro	Enterprise
No additional transaction fees	0%	0%	0%	0%
Products, file storage and bandwidth	Unlimited	Unlimited	Unlimited	Unlimited

Contact sales or call 1-866-991-0872 for custom pricing

Bulk Pricing

If the site is using the Volume Pricing in MYOB Advanced to configure and use Bulk Pricing, these prices can also be exported to BigCommerce. For example, if you have a Sales Price with a Break quantity defined on the Sales Price screen (AR202000),

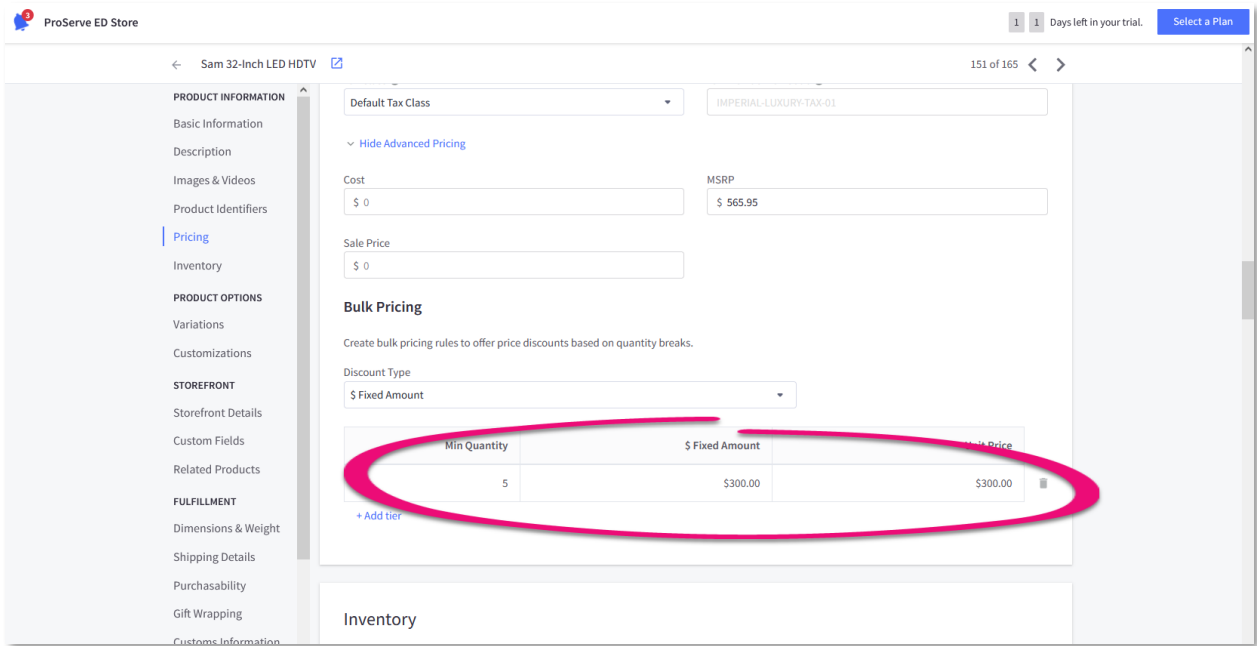
Sales Prices

CREATE PRICE WORKSHEET

Price Type: All Prices Item Class ID: Price Class: Price Manager: Me My
 Price Code: Inventory ID: Price Workgroup: My
 Tax Calculation Mode: All Modes Warehouse:
 Effective As Of: 18/07/2022

Price Type	Price Code	Inventory ID	Description	UOM	Warehouse	Promotion	Fair Value	Prorated	Discount	Break Qty	Price	Currency	Tax Calculation Mode	Tax Category	Effective Date	Expiration Date
Base	ELE32LED		Sam 52-inch LED HDTV	EACH			5.00			5.00	300.00	AUD	Not Set	DEFAULTD	1/07/2022	
Base	EXACCLEAN		Airconditioning Unit Clean up	EACH			0.00			0.00	108.00	AUD	Not Set	DEFAULTD	1/01/2018	
Customer	CUST000005		Airconditioning Unit Clean up	EACH			0.00			0.00	138.00	AUD	Not Set	DEFAULTD	1/01/2018	
Customer Price Class	EDUC		Airconditioning Unit Clean up	EACH			0.00			0.00	120.00	AUD	Not Set	DEFAULTD	1/01/2018	
Base	HDSERVY		Hardware Service	HOURL			0.00			0.00	120.00	AUD	Not Set	DEFAULTD	1/01/2018	
Customer	CUST000005		Hardware Service	HOURL			0.00			0.00	172.00	AUD	Not Set	DEFAULTD	1/01/2018	
Customer Price Class	EDUC		Hardware Service	HOURL			0.00			0.00	150.00	AUD	Not Set	DEFAULTD	1/01/2018	
Base	ITM0000001		Standard Keyboard	EACH			0.00			0.00	35.79	AUD	Not Set	DEFAULTD	1/07/2019	
Customer	CUST000005		Standard Keyboard	EACH			0.00			0.00	33.24	AUD	Not Set	DEFAULTD	1/07/2019	
Customer Price Class	EDUC		Standard Keyboard	EACH			0.00			0.00	30.88	AUD	Not Set	DEFAULTD	1/07/2019	
Base	ITM0000002		Bluetooth Keyboard	EACH			0.00			0.00	19.95	AUD	Not Set	DEFAULTD	1/07/2019	

When the Base Sales Price entity is synced, the system will insert a bulk pricing line for that particular product.



Pricing Limitation

The following price types maintained in MYOB Advanced cannot be exported to a BigCommerce store:

- **Customer-specific prices:** Prices defined in MYOB Advanced for a particular customer—that is, prices that have the Customer type—cannot be exported to the BigCommerce store. If you want to provide a particular customer with the ability to purchase products at individual prices, create a separate customer price class for this customer. This way, the prices that you define for this customer price class will be available for only the customer that you add to this customer price class.
- **UOM-specific prices:** In MYOB Advanced, if the Multiple Units of Measure feature is enabled on the Enable/Disable Features (CS100000) form, you can define a sales price of an item for each of the units of measure in which your company sells this item. However, only prices defined for the base UOM can be exported to BigCommerce.
- **Warehouse-specific prices:** If the Multiple Warehouses feature is enabled on the Enable/Disable Features form, prices that are defined to apply only when products are sold from a particular warehouse—that is, when a specific warehouse ID is selected in the Warehouse column for a particular price—are not exported to the BigCommerce store.

Only prices that are effective on the date of the synchronisation are exported; historical prices and prices with an effective date in the future are not synchronised. If an item has multiple prices of the same type that are effective on the date of the synchronisation, the price of the highest priority is imported. For example, if a regular base price of \$5 and a promotional base price of \$4.50 for the same item are effective on January 31, 2021, which is the date when you synchronise the Base Sales Price entity, the promotional price of \$4.50 will be exported to the BigCommerce store.

Template items, matrix items and product variants

Both Shopify and BigCommerce support the selling of Products with different variants. Because the Template Item entity can only be exported from MYOB Advanced to the stores, you must

configure the appropriate attributes, item classes, template items and matrix items in MYOB Advanced, and then export these to the stores.

The Template Item entity is separated from the Stock Item entity, therefore you should activate the Template Item entity and configure syncing or real-time sync as required. When you sync the Template Item entity, the Template Item itself will be a product of the store, while its Matrix Items become the product variants.

When implementing the Template Items and Matrix Items feature for a store, if the site has a large number of product variant images, this can lengthen the implementation timeline, because users will need to manually drag and drop product images on the Stock Items screen, Attributes tab for each variant. If images are added for a matrix item as links in the Media URLs table on the eCommerce tab of the Stock Items (if the matrix item is a stock item) or Non-Stock Items form (if the matrix item is a non-stock item), these images are not exported to BigCommerce or Shopify.

Implementation Efforts Estimation

The information below provides an estimate on the time and effort to implement the eCommerce Connector. The connector itself requires little configuration to be up and running, however, most of the solution relies heavily on other modules of MYOB Advanced, and their implementation efforts need to be considered separately.

Item	Effort Estimate	Note
Implementation of Finance: GL, AP, AR, reports, etc.	N/A	Needs to be estimated separately, varies based on requirements
Implementation of Inventory: Item Class, Stock Items, Non-Stock Items, Kits, Template Item, Matrix Items, Item Sales Categories	N/A	Needs to be estimated separately, varies based on requirements
Implementation of Orders: SO, PO, Transfers, etc.	N/A	Needs to be estimated separately, varies based on requirements
Basic eCommerce store setup: Payment Methods, Shipping, Taxes, Store Info, etc.	3 hours per store	
Configure BigCommerce/Shopify Store screen in MYOB Advanced	1.5 hour per store	
Configure Field Mappings to support the synchronisation	From 0 to minimum 2 hours per entity	Field Mappings are not required – by default, the Commerce Connector exports/imports data into a set of standard fields. If the customer has a requirement to import/export into custom fields, change the mapping of standard field, or require

		writing of formulas to accommodate specific scenarios, then the effort will change and need to be re-estimated accordingly
Establish Store Connections	1 hour per store	
Perform first synchronisation and resolve error messages	Minimum 3 hours	
Automate Synchronisation and configure Real-Time Sync	2 hours per store	
Configure Gift Certificate/Gift Cards	2 hours per store	
Configure Customer Pricing, Bulk Pricing	2 hours per store	