**Free of charge**, TaiRox will provide an estimate of the costs required to integrate an existing web store with Sage 300, based on answers to questions in this document. Web stores that provide order, payment, and shipping data ("Order Data") with integration in mind will have lower costs. Answer as many questions as completely as possible. If you wish to set up a meeting to review this document with TaiRox, email [info@tairox.com](mailto:info@tairox.com?subject=Web%20Store%20Assessment).

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| **Basic Protocols and Formats** | |
| **Transporting Data** | How does the web store provide Order Data that is ready for integration?  A) Is Order Data available using a web API?  B) Is a file with Order Data placed in an FTP folder?  C) Is a file with Order Data manually downloaded to a local file? |
| **API Protocol** | How does the web API deliver Order Data that is ready for downloading?  A) Is the API interface documented? If so, please provide.  B) Can the integration call the API with a date-time parameter that requests the API to deliver Order Data from orders that have changed after that date-time?  C) Can the integration call the API with an identifier parameter that requests the API to deliver Order Data from orders that have an identifier greater than that identifier? |
| **FTP Protocol** | The web store periodically creates a file with Order Data that is ready for downloading. The integration will copy that file from the FTP site to the Sage 300 environment for processing.  A) Does each file have a different name?  B) Must the integration delete the file on the FTP site after downloading? |
| **Order Data**  **Format** | How is the Order Data provided to the integration?  A) As XML?  B) As JSON?  C) As Text? |
| **Order Changes** | A) Is it true that after Order Data is delivered for download, the orders delivered cannot change in the web store?  B) If orders can change after being delivered for download, will the changed order be included in the Order Data with the same order identifier? |

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| **Web Store Customer Scenarios** | |
| **Sage 300 Background** | Once a Sage 300 shipment has been invoiced, it can no longer be edited.  When a Sage 300 order has had items shipped, the quantity on order is reduced by the quantity shipped. The order can be edited and additional shipments can be made. |
| **Known vs. Unknown** | Does the web store take orders from customers in Sage 300?  Does the web store take orders from customers not in Sage 300? |
| **Shipped vs.**  **Unshipped** | Does the web store take orders that are already shipped?  Does the web store take orders that are to be shipped in Sage 300?  **Scenario:** Soft goods (on-line courses, software licenses) may be sold and paid for on the web store and shipped in the sense that a course or license was provided.  **Scenario:** The web store may allow known customers to self-serve by placing orders that are not shipped or paid for. Sage 300 shipment and invoicing processes will be handled in Sage 300. |
| **Shipping Costs** | How are shipping costs distinguished from item costs in an order? |
| **Paid vs.**  **Unpaid** | Does the web store never process payments?  Does the web store process payments for some or all orders?  Does a payment always represent the full charges for the order?  Notes: When an order is fully paid for, this will include taxes and shipping charges. The appropriate tax authority will have to be paid. The shipping charges may need to be distinguished in Sage 300 as miscellaneous charges rather than items. |
| **Detailed**  **Charges** | Is there a single charge for the order?  Are there detailed charges per line on the order? |
| **Payments** | Are payments processed on the web store?  Can there be partial payments for an order?  Can there be multiple payments for an order?  Can there be a single payment for multiple orders? |
| **Taxes** | Are taxes calculated on the web store?  If so, do these calculations override the calculations in Sage 300? |
| **Avalara AvaTax**  **(**for Sage 300 customers using AvaTax) | AvaTax is a service that calculates and remits taxed amounts to the appropriate tax authorities in the United States.  **Scenario 1:** The orders are paid orders. The web store uses AvaTax's API to calculate tax amounts. Avalara prepares tax amounts based on data provided to Avalara by the web store. The tax amounts in the Order Data are put into a dummy Sage 300 tax authority that is not affected by the Sage 300 AvaTax implementation.  **Scenario 2:** The orders are unpaid orders. Taxes are not included in the Order Data. AvaTax is implemented in Sage 300. AvaTax's calculations in Sage 300 determine which tax authority is to receive tax.  **Custom:** There is a mixture or paid and unpaid orders. Tax authorities determined by Order Data such as customer's address or order ship-to address. |

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| **Possible Custom Requirements** | |
| **Mapping**  **Customer Numbers** | Will all customer numbers (identifiers) in the web store data be the same as those in Sage 300?  Will some customer numbers (identifiers) in the web store data be different from those in Sage 300 and require a mapping table? |
| **Mapping**  **Item**  **Numbers** | Will all item numbers (identifiers) in the web store data be the same as those in Sage 300?  Will some item numbers (identifiers) in the web store data be different from those in Sage 300 and require a mapping table? |
| **Mapping Terms Codes** | Are A/R fields such as terms codes determined by a mapping table? |
| **Future Orders** | Are any orders taken by the web store to be for delivery on a specific date? |
| **Blackout Dates** | Are any orders taken by the web store to NOT to be delivered on specific dates? |
| **Currency** | Are all orders, all items priced in the same currency?  If not, are all items within a single order priced in the same currency? |
| **Banks** | Are all payments made to the same bank?  Are some payments made to different banks? If so, how is the bank determined? |

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| **Testing: Use Case Examples** | |
| **Use Case 1** | Please provide an Order Data file with multiple items and multiple charges with tax amounts, if such an order is allowed by the web store. |
| **Use Case 2** | Please provide an Order Data file with multiple items and multiple charges with no tax amounts, if such an order is allowed by the web store. |
| **Use Case 3** | Please provide an Order Data file with multiple items and zero charges, if such an order is allowed by the web store. |