eCommerce Integration

MYOB Exo
ECOMMERCE INTEGRATION

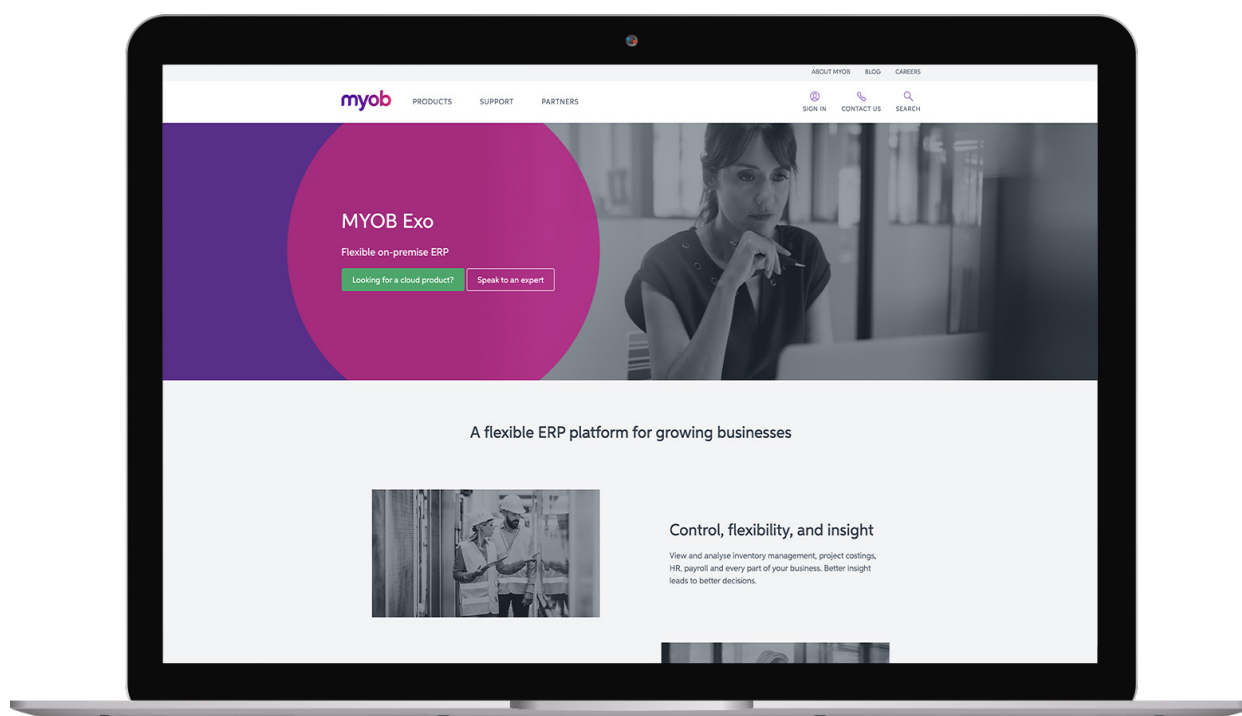**acclaimgroup**
evolve your business

Weka Online
ERP • ECOMMERCE • INTEGRATION

eCommerce Integration.

We have created an extensive eCommerce integration with MYOB Exo, offering connections with well-known eCommerce platforms on the market. Our base integration covers the synchronisation of data between critical endpoints to automatically fulfil sales orders and maintain MYOB Exo as the source of truth.
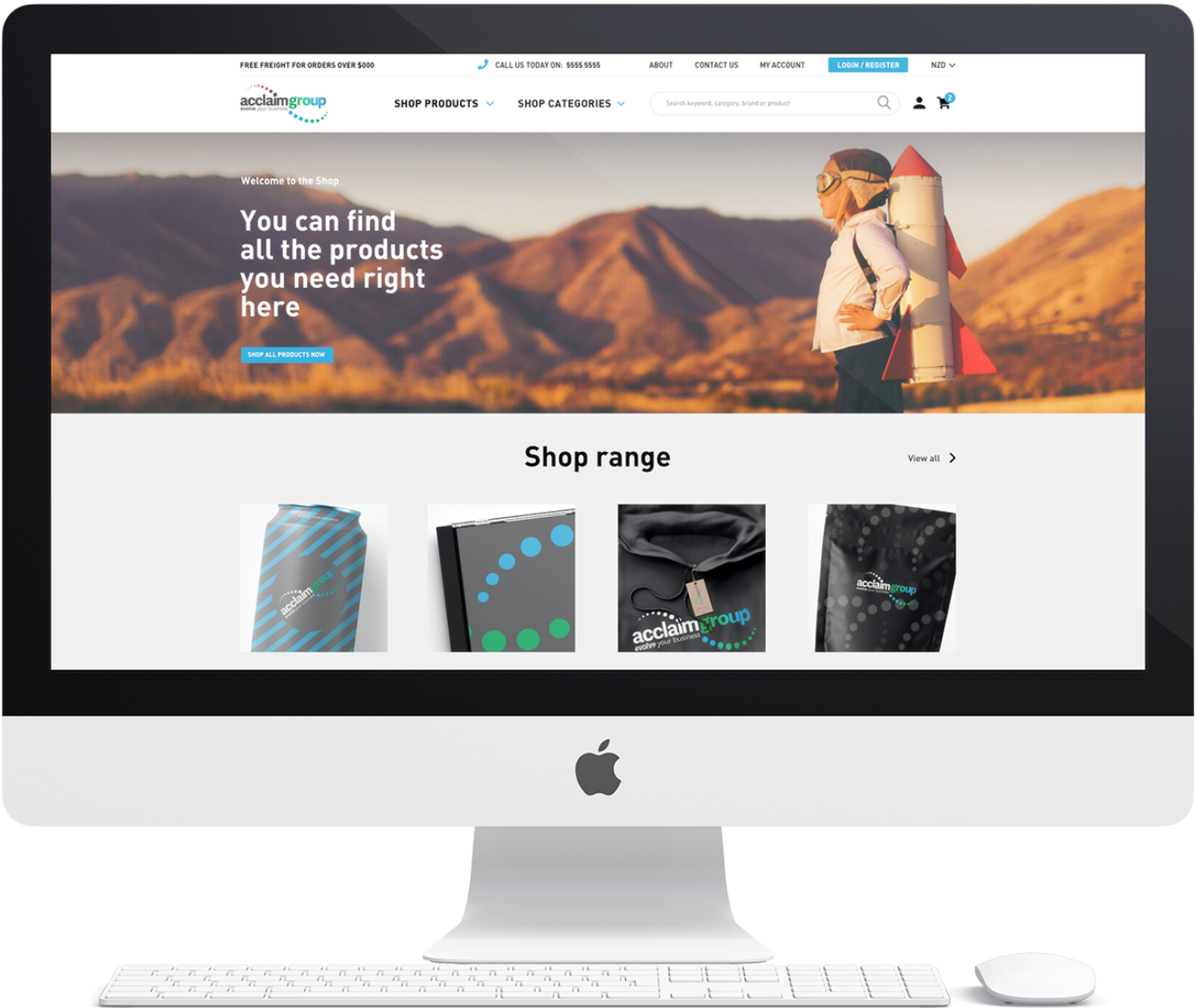
Connected eCommerce Platforms:

Stock Items:

- ✓ The eCommerce platform will retrieve product data from MYOB Exo hourly.

- ✓ The integration will sync through the title, description, attributes, and connected website categories.

- ✓ Stock quantities and stock management are optional.

Debtors and Contacts:

✓ The website will create a new debtor in MYOB Exo on sales order completion if the customer does not exist.

✓ The integration will sync debtors from MYOB Exo to the eCommerce platform daily.

✓ The fields synced are Debtor ID, Debtor Name, Email, Phone number, Postal Address, Delivery Address.

Sales Orders:

✓ The integration will create a sales order in MYOB Exo after the customer completes the purchase process.

✓ The sales order integration will trigger either hourly or through a webhook provided by the eCommerce platform.

✓ The fields set are: Customer, Customer Order Number => Website Order ID, Delivery Address, Notes => Customer Note, Freight, SO Line Items.

✓ The fields set for a line item are: Stock Code => SKU, Description => Product Name, Quantity, Unit Price, Discount Percent.

Additional Integration.

Website Forms and Social Media ✔

We can build a connection between your website forms or social media lead forms, i.e. Facebook. We can take the form data and create a new lead within MYOB Exo. We will scan the website and social media leads on an hourly basis.

Sales Pricing ✔

If you have an eCommerce website with customer-specific pricing, you will need to connect the MYOB Exo sales prices to your website. Our sales price module will give your website account holders access to their customer prices. When a customer signs into the website, the regular product prices will change to their set price.

Sales Invoice ✓

Our sales invoice integration will improve your overall online customer service. Customers can now view an invoice statement online, look up historical invoices, and download a PDF copy of their invoice. We can implement a credit card system, giving your customer the ability to settle their balance online.

Quotes ✓

Customers can edit or create new Quotes on the website, and this will update/create new business opportunity/quotes in MYOB Exo. Our integration quote module will improve your customer online experience; now, customers can view historical quotes, add the quote to the cart, and download a PDF copy of the quote.

Returns & Warranties ✓

Standard business practice for online shops is to accept returns and honour warranties. We can automate the process to reduce the manual entry of data. The customer fills in a form online, on form submission, instruction on how to return the items displayed on the screen and emailed. When you receive the goods, you can accept or deny the return/warranty.

eCommerce Website.

Website Graphic Design.

With the expert website design package, you will work closely with our web designer, allowing you to have complete control over all elements of the design of your new website. Our web designer will design the website from the ground up, including navigation, banners using your brand imagery, page elements, custom pages and how it works on the mobile.

What's included:

✓ **Wireframe Design stage** where our designer will discuss the pages you need and the elements and create a wireframe stage to work out the layout before the visual design has begun.

✓ **Custom pages** the package includes the: Homepage, About us, Contact us, Product Category, & Product pages. We will also design up to 2 other custom pages for your website.

✓ **Website banners** for three of the pages you require, including a slider on the homepage linking to products and specials. These banners will be custom designed using your brand and photography style.

✓ **Page elements** for the required pages, custom-designed by our web designer with responsiveness in mind, allowing each section to look great on desktop, tablet, & mobile.

✓ **A mobile design** applied to all pages giving your developer a view of how each section will respond to a mobile device.

✓ As part of the Expert Website Design package, you will also be able to have **three rounds of alterations** to the final design and our web designer's help along the process of refining your new website till it's perfect for you.

Anything not covered above is considered additional customisation; we are happy to send through a proposal specific to your requirements.
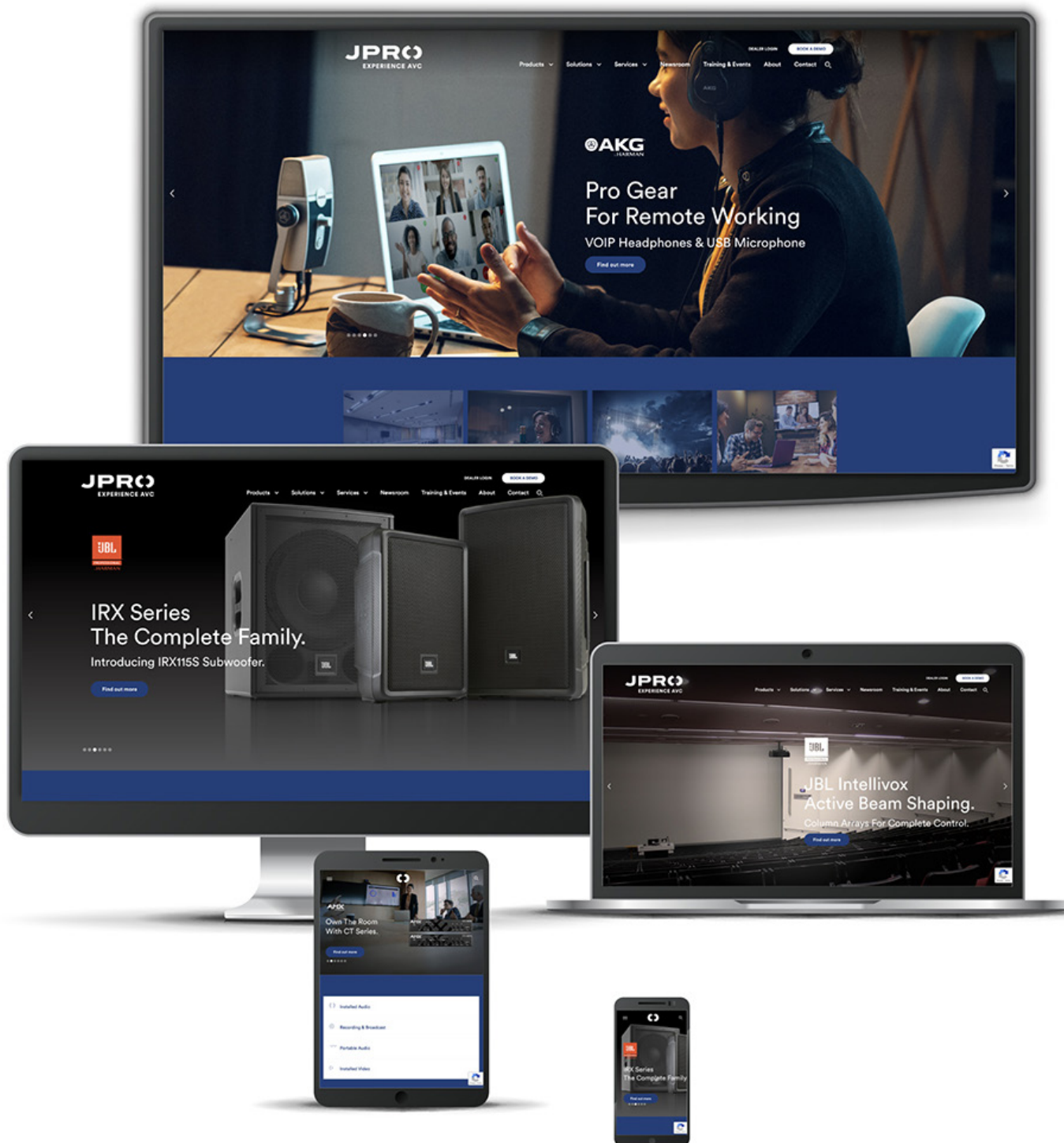
Website Development.

Our web developers will take your website design and develop a custom-built WordPress website with WooCommerce. The development team will create the website based on design files supplied by the designer.

What's included:

- ✓ **The planning stage** involves collaboration between our development team, the chosen designer, and your management team.

- ✓ **Custom pages** included in this package are the Homepage, Contact us, Product Category, & Product pages. We will also develop up to 2 other custom pages for your website.

- ✓ **Website speed** is a top priority when developing your website. Our website programmer will compress pages and images to an optimal level.

- ✓ **Security** plugins are included in the package to ensure you will have a secure website.

- ✓ Your new website will be **fully responsive** for all devices including, Mac, PC, laptop, tablet and mobile.

Anything not covered above is considered additional customisation; we are happy to send through a proposal specific to your requirements.

Courier Integration.

Connected Courier Platforms:

Sales Orders ✓

The integration will send sales order data from MYOB Exo to the courier; the sales order data will include the shipping details and the order line data.

Tracking Link ✓

The integration will request a tracking link from the courier company; we will update the sales order with the tracking link in a custom field.

Marketplace Integration.

Connected Marketplaces:

Stock Items ✓

Our integration will maintain stock levels and pricing between MYOB Exo and your chosen marketplace.

Sales orders ✓

When you receive a sales order from the connected marketplace, our integration will take the information and create a new sales order in MYOB Exo. The integration options include the ability to nominate a warehouse/branch and alter the sales order type. Please contact us if you have specific requirements for your marketplace integration, and we will come back with a proposal.

Email Marketing Integration.

Connected Email Marketing Platforms:

 Constant Contact

 mailchimp

 verticalresponse
Marketing. Just Like That.

 Campaign Monitor

 Campaigner

 GetResponse

Contacts ✅

The integration will connect contacts inside MYOB Exo to your Email Marketing system. The contact data will flow both ways between the two systems, updating the full name, email address and checking if the contact has unsubscribed.

Marketing Lists ✅

The integration will establish a connection between the marketing lists in MYOB Exo and the audiences lists in your email marketing system.

CRM Integration.

Connected Marketplaces:

monday.com   ActiveCampaign >   HubSpot   salesforce

ZOHO   pipedrive   freshworks   insightly

Leads ✓

Leads uploaded into your CRM will flow back into MYOB Exo. The lead data will include the marketing source and details about the prospect.

Quotes and or Business Opportunities ✓

The integration will synchronise quotes/business opportunity between MYOB Exo and your CRM.

Customers and Contacts ✓

We can establish a two-way connection between customers and contacts in both MYOB Exo and your CRM.

Marketing Lists ✓

The integration will establish a connection between the marketing lists in MYOB Exo and the audiences lists in your CRM.

B2B Portal.

The Weka B2B Portal is the face of your business and the new way to interact with customers. Customers can now view their invoices, orders, and quotes online.
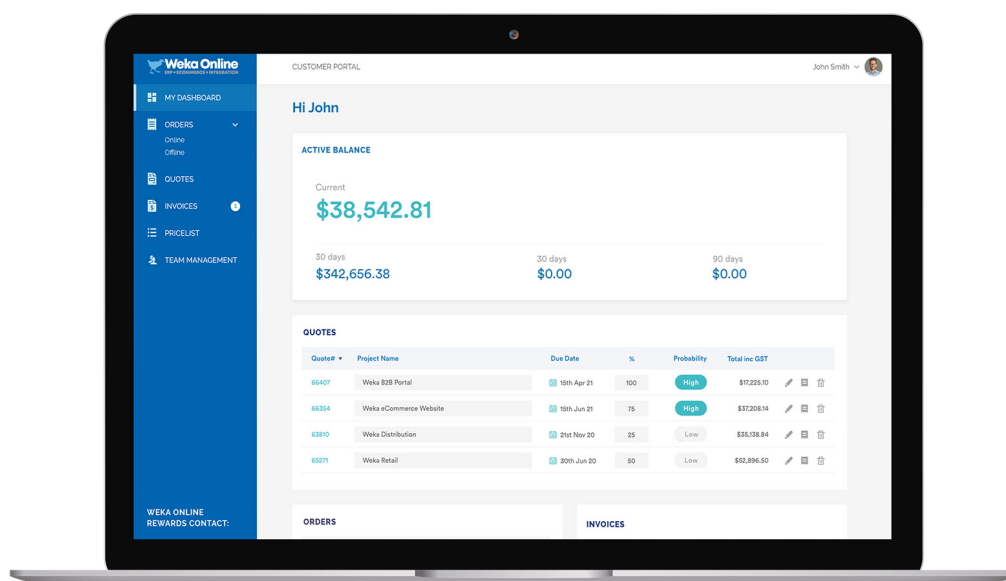
Custom Dashboard ✓

The dashboard is the first page your customer will see once logged into the website. The dashboard will summarise orders, invoices, quotes, and an overview of their credit balance. We can design a dashboard and experience to reflect your up to date branding guidelines.

Order Form ✓

A B2B order form is different from a traditional online shopping cart. Weka Online have designed an order experience with speed in mind. A customer can add multiple items to the order on one screen and complete the order with a two-button checkout. A customer is not required to manually enter in their billing and shipping details, as you already have them on file.

Order History ✓

Your customer can now view their complete order history, displaying both online and offline orders. Additional functionality includes searching through order history, using their purchase order number or the sales order number. The customer can view details of each order and can even re-order the products.

Quote Management ✓

Your Customers' can now manage their quotes online. A customer can now create a quote, approve a quote, and view the quote history.

Invoice History ✓

Tired of customers' ringing up requesting their invoice statement? Now your customers can view their invoice statement online, including their complete invoice history. The opening invoice history page will show all outstanding invoices, with the option of settling the balance using their credit card. The invoice details page will display the invoice items and a link to download the invoice as a PDF.

Role-based Pricing ✓

Role-based pricing is a critical difference between B2B ordering and B2C ordering. You can now offer your customers tiered pricing and pricing specific to an individual customer. When your customers' log in, they will see their pricing and purchase the product based on their pricing level.

Customer Specific Products ✓

As part of your new B2B portal, you may need to upload products specific to a customer or a group of customers. We have built-in functionality to showcase products based on set product attributes. We can even develop your website to hide the products from the public.

Team Management ✓

The team management module gives your customers the ability to update, remove, and create logins for key staff members. The module contains b2b specific user roles, presenting your customers with different access levels to the B2B portal.

Custom Solutions ✓

Weka Online's in-house development team can build you a custom B2B portal based on your specific requirements. Weka Online will assign a technical consultant to discuss your requirements, scoping out an initial brief. The Weka Online design and development team will work from the scope and produce a customer interface based on your needs.

A B2B portal can improve the way you do business with your customers. We are happy to demo our B2B portal to your team; please contact us to request a demo.

Interested?

We look forward to
working with you soon.

Let's chat!
Come find us here.

acclaimgroup.co.nz