Unicart – Quickstart Guide

Version 1.x
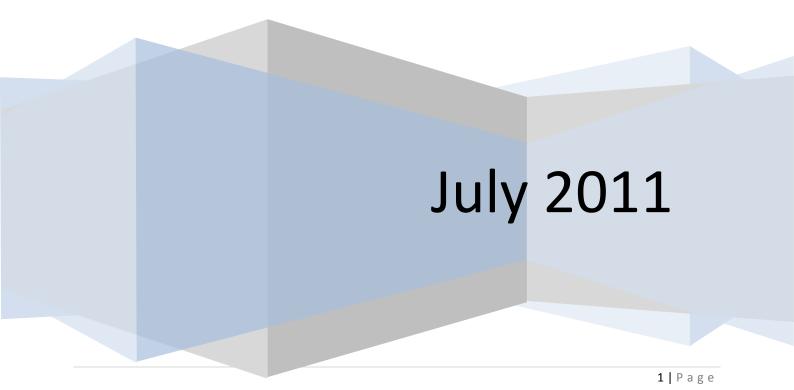
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OUTLINE

INTRODUCTION

The purpose of this document is to help new users get up and running with Unicart as quickly as possible. This document does not attempt to explain how to setup MYOB Accountright or configure any of the shopping carts supported by Unicart, for this refer to the appropriate product documentation.

The goal of Unicart is to allow users to run an online website while allowing them to maintain the information in a product (MYOB) that they are already comfortable with.

Unicart is a product designed by Unified Systems Ltd. It is not in any way supported or endorsed by MYOB.

BEFORE YOU BEGIN

Before you start using Unicart we have made a few assumptions about your setup. Unicart requires the following:

- A PC Running Windows 2000/XP/2003 Server/2008 Server/Vista/7.
- MYOB Accountright V14+ (Standard, Premier, Enterprise, etc). Business Basics is not supported.
- You already have a website setup and running with your hosting provider. Depending on the shopping cart you are running you will need the following information:
  - Magento:
    - URL to the Magento API, API Username and Password and the HTTP Username/Password if required to access your website (optional)
  - OsCommerce, Ubercart & Virtuemart:
    - Connection information to the MySQL Server running your website, including Host, Database, Username, Password, Port and if applicable the (SSL Key, Certificate and CA Certificate). Connection information to the FTP Server pointing at your website if you intend to manage photos from inside MYOB. Order statuses indicating orders are ready to transfer to MYOB and indicating orders are already in MYOB

PREPARATION

PREPARING MYOB

The main area in MYOB that needs to be configured is the Item Information.

We STRONGLY advise you always run a full backup of MYOB before running Unicart, particularly during the initial setup phase and if you have made any configuration changes!

CATEGORIES

Unicart uses the Custom Lists in MYOB to assign a product to a category. During sync all the values in the Item List you have designated as the category container are transferred to the shopping cart. Because many website have multiple levels, and the MYOB Custom List can't support this, you can get around this by renaming the categories and assigning them to parents once they are transferred to the website. Unicart will maintain the links between these fields and doesn't require the custom list in MYOB to have the save value as the category.

For example, in MYOB You might have a category TOOLS_OUTDOOR_POWERED, while in the website you might rename this to Power Tools under the Outdoor Tools category.

There is no problem creating additional categories in the website that are not in MYOB, however no items in MYOB will ever be added to these categories.

ITEMS

ITEM NUMBERS

It is best practice (but not compulsory) to keep the Item Number's simple, with no spaces and limited to the characters A-Z, 0-9, _ and -.

CATEGORIES

To be transferred to the website, an Item must be Active and it must be assigned to a category. If needed you can assign one of the custom fields to hold a comma delimited lists of additional categories if you want the item to be shown under more than one category. These additional ids must be obtained from the website admin after sync.

WEIGHT/DIMENSIONS

If required, you can specify either a weight figure, or full item dimensions for an item using one of the custom fields in MYOB.

PARENT SKU

If the shopping cart you are running supports child products, you can assign a custom field to hold the id of the parent this item belongs to. To get this you must first sync the parent item to the website, get the id from the website's admin section then add it here.

STOCK LEVELS

Normally the Unicart Stock level will take the Inventory level from MYOB and sync it to the website. (For this reason it is very important if you are making sales in MYOB that are not from the website you should sync regularly to keep the website stock level accurate). If you are not using MYOB Inventory you can still specify a stock level for the website using a custom field (eg a drop ship information where the stock level comes from the supplier. In this situation we may be able to help you with an extension for Unicart to import the supplier stock level's for you).

NOTES

Once an item has been transferred to the website, future syncs will not update the description fields of an item. This allows additional information to be added to an item which MYOB is unable to hold. Depending on the cart you are using there may be other fields (eg Meta Data) that are also treated the same way.

USERS

It may be preferable to setup another user in MYOB for Unicart to use.

PREPARING THE SHOPPING CART

Generally Unicart works best with a brand new installation of the shopping carts, particularly with no existing items/sales present. If this is not possible there are a few things you can do to make the integration simpler.

We STRONGLY advise you have a current full backup of your website before running Unicart, particularly during the initial setup phase and if you have made any configuration changes!

ITEMS

Remove existing items or ensure the Item Number (SKU) is IDENTICAL between the website and MYOB.

SALES

Make sure all sales in the website are already marked as In Myob (or whatever status you have setup to indicate an invoice is already in MYOB).

CUSTOMERS

If a customer on the website exists in MYOB already, make sure their CardID matches the ID in the website, with the ID Header you wish to use and 0'd out to 8 characters. eg If you are using a W for website customers (ID Header), then Customer 3 in the website would have card id W0000007 in MYOB.

SETTING UP UNICART

Download the latest Unicart from http://www.unifiedsystems.co.nz. Open the zip file and run the setup.exe and install Unicart.

When you open Unicart the Configuration Wizard should display. Enter the General, MYOB and Shopping Cart settings and finish. If you need to add additional settings (eg FTP settings for transferring images), or if you need to make corrections you can get to this via the Options button on the main interface.

RUNNING UNICART

Once Unicart is installed you simply start it and run the Sync.

NOTES

Invoices and customers to be transferred to MYOB the invoice must be set to the correct status for transfer. Invoices are matched on the InvoiceNumber, and if an existing invoice is found in MYOB with this number then the invoice will not be transferred, and its status will be updated. In the same way, Customers are matched on the CardID and if an existing record is found in MYOB the record will not be transferred.

Items will only be transferred if they are Active, assigned to a category, and either the item does not exist in the website, of the MYOB record has been updated since the product was last updated on the site.