



Web 2 Market Customer Service Module Configuration Questionnaire

Answering the questions in this questionnaire will help us to quickly configure your Customer Service Module. Please answer the questions to the best of your ability and as accurately as possible. If you have any questions, feel free to contact Web 2 Market at (708) 653-3100. Thanks.

Please keep in mind, this questionnaire is a guide to help you help us to configure your Customer Service Module. Some questions you may not be able to answer and some you may not understand. If you find yourself struggling with a question, please continue with the next one. When we contact you to finalize configuration we will go over everything in this questionnaire in detail to make sure that everything is correctly configured to meet your business needs.

NOTE: For many of these options the default settings should be sufficient. Items that start with → are items that are often customized, so you may want to look at those options carefully. Items preceded by ⊗ are very rarely customized and should only be changed if you have a good reason.

Web Order Numbers: Enter the number range that MOM recognizes as Web Order Numbers (Alt_Order). These numbers should correspond to the AbleCommerce Order Numbers. The default range is 10,000,000 – 15,000,000. NOTE: These numbers will appear in MOM In the Alt Order field. This field is often used in MOM to show orders that have come from a source other than MOM, i.e. web orders, call center orders, third party orders, etc.

1. Web Order Number Start (*Default - 0*)
.....
2. Web Order Number End (*Default - 15,000,000*)
.....
3. Include Offline Orders - Should Offline Orders (Non-AbleCommerce originating Orders) be added/updated? (*Default – Yes*)
.....
4. Include Offline Users - Should Offline Users (Non-AbleCommerce Users) be added/updated? (*Default – Yes*)
.....

Customer Service Options - Orders: Enter information for the Customer Service Module options you will be using.

5. Orders Days Back – How many days back should orders be updated from? NOTE: This will override any larger value set in the report. Set to 0 to always use the report settings. (Default – 10)
 _____

6. Update Order Status – Should the MOM status of Orders be updated so they display on the AbleCommerce storefront? This includes statuses like Shipped, Back Ordered, Picked, Cancelled, Completed, etc. (Default – Yes)
 _____

7. Tracking Days Back – How many days back should tracking information be updated from? NOTE: This will override any larger value set in the report. Set to 0 to always use the report settings. (Default – 10)
 _____

8. Order Status Codes – List out any Custom Order Status Codes that you use in MOM and the corresponding AbleCommerce Order Statuses (include the Order Status ID if you know it) There are some default Order Statuses that Web 2 Market will automatically set up for you. You only need to enter statuses that are different or not included in the defaults.

Defaults Codes:

- | | | |
|------------------------------------|--------------------------------------|----------------------------------|
| BI - Return Ready to Invoice | FI - Filled | PA - Needs Packaging Paperwork |
| BO - Back Order | GC - Gift Certificate Needs Printing | PB - Partial Back Order |
| CA - Awaiting Credit Card Approval | HD - On Hold | PE - Permanent Hold |
| CD - Credit Card Problems | HS - Shipment on Hold | PI - Ready to Pick |
| CP - Credit Card Expired | II - Insufficient Funds | PS - Packed Ready to Ship |
| CK - Check Clearing | IN - Ready to Invoice | QO - Quoted |
| CM - Committed | ND - Dropship Not Yet Ordered | RT - Returned |
| CN - Cancelled | NW - Needs Weighing | SC - Needs Scanning |
| CS - Counter Sale | OD - Dropship Ordered | SH - Shipped |
| EP - Temporary Hold | | SV - Service Item |
| FD - Dropship Filled | | UO - Uncompleted Order - On Hold |

MOM Status Code	MOM Status Name	AbleCommerce Status
Example: SH	Shipped	Shipped (ID = 3)

- 9. ☒ Update Shipment Tracking – If there is shipment tracking information in MOM should it be updated on the AbleCommerce storefront? This is information like UPS tracking numbers. (Default – Yes)
.....
- 10. ☒ Tracking Days Back – How many days back should tracking information be updated from? NOTE: This will override any larger value set in the report. Set to 0 to always use the report settings. (Default – 10)
.....
- 11. ➔ Process Prospects – Should MOM Prospects be added to AbleCommerce? Prospects are contacts in MOM that are designated as a Prospect, not a customer. These are usually names from marketing lists, trade shows, etc. (Default – No)
.....

Updating Contacts: These options will determine how MOM Contacts and MOM Customers are updated in AbleCommerce. **Customers** are any MOM Customers who have placed an order recently. **Contacts** are any MOM Contacts or Customers who have had their contact information updated recently but have not placed an order, i.e. they made a change over the phone with a customer service rep.

- 12. ☒ Process Contacts – Select which contacts and customers you want to update in AbleCommerce (choose one option) (Default – Yes, All Contacts/Customers)
 Yes, All Contacts/Customers []
 No, Never Update Contacts/Customers []
 Only Customers – Only update customers with orders []
 Only Contacts – Only update contacts from the CSContacts report []
- 13. ➔ UserName – AbleCommerce requires that every customer have a UserName so they can access their account information from the web site. Customers who create an account on the web site will have their e-mail address be their UserName by default. Where would you like the AbleCommerce UserName (used to log in to the AbleCommerce storefront) for your MOM Customers to be handled? (choose one option) (Default – MOM Email)
 - Always AbleCommerce – The UserName will always be handled in AbleCommerce. MOM will never change it. []
 - MOM Email – The UserName will be changed to what is in the MOM Email field if the MOM Email field is not blank and left alone otherwise. []
 - MOM Email only if not in AbleCommerce – The UserName will only be changed to the MOM Email if the AbleCommerce UserName is not already an email address. []
 - Always MOM Default – The UserName will always be reset to the MOM Email or the default below if the MOM Email field is blank. []

14. Default UserName - What should the default AbleCommerce UserName be if there is no email address in MOM? This is only for new customers (not already in AbleCommerce) or if Always MOM Default above is selected. (choose one option) (Default – Customer Number)

- MOM Customer Number []
- First Initial and Last Name* []

* Not recommended for large stores.

15. → Password – AbleCommerce also requires customers to have a Password to access their account information on the web site. The Customer Service Module can update AbleCommerce with a password from MOM if one is entered. That way Customer Service Reps can change customers passwords in MOM and the update will appear on the AbleCommerce Site with the next update. The MOM Password is the SiteLINK Password. Where would you like the AbleCommerce Password to be handled? (Default – AbleCommerce)

- AbleCommerce – Passwords will never be updated from MOM []
- MOM – Passwords will be updated to what is in MOM if it is not blank []

16. → Default Password - What should the default Password be if there is no password in MOM? NOTE: This is only for new customers. (choose one option) (Default – Zip Code)

- Zip Code (first 5 characters) []
- Address Number (first set of numbers) []
- Phone Number (first ten digits) []
- Random Password (random six character password) []

17. ⊗ Force Custom Fields Update - Should the Custom Fields (CType, CType2, CType3, NoMail, NoEmail, NoRent, Exempt, and any other custom fields) always be updated with MOM values? Setting this to Yes makes sure that any customers that have placed orders will always have this information updated to the current information in MOM. It will force these fields to update, even if Process Contacts and Process Prospects are set to No. (Default – Yes)

.....

CTypes and Groups: Both AbleCommerce and MOM can have specific Customer Types (called CTypes in MOM and Groups in AbleCommerce). These Customer Types can have their own Specials and Discounts applied to them. If a Special or Discount has been assigned to a specific CType in MOM the Inventory Module can assign that Special or Discount to the corresponding Group in AbleCommerce. The Customer Service Module can also automatically assign customers to Groups based on CTypes (this is useful for special customer types, like wholesalers, etc.).

18. Handle CTypes/Groups – List out any MOM CTypes you have and the corresponding AbleCommerce Groups (include the Group ID if you know it). (choose one option) (Default – Ignore CTypes/Groups)

- Ignore CTypes/Groups – Handle in AbleCommerce []
- Add Customer to Groups but don't change existing group relationships []
- Add Customer to Groups and remove other group relationships []

19. MOM CTypes and AC Groups – List out any MOM CTypes you have and the corresponding AbleCommerce Groups (include the Group ID if you know it).

MOM CTypes	AbleCommerce Groups
Example: W	Wholesalers (ID = 3)

20. MOM CType Fields – Which MOM CType fields will be used to match with AbleCommerce Groups? (select as many as apply) (Default – All Options Selected)

-CType []
-CType2 []
-CType3 []

21. Unmatched CTypes – If there is a MOM CType in the update that is not in the above list, how do you want to handle it? (choose one option) (Default – Add Customer to Default Group)

- Don't Add Customer to Any Groups []
- Add Customer to Default Group []

22. Default AbleCommerce Group – What AbleCommerce Group should customers be assigned to if there is no CType specified? Include the AbleCommerce Group ID if you know it. (Default – No Group Association)

.....

Duplicate Records: Because AbleCommerce uses Email addresses as the UserName, they must be unique for each user. MOM, however, uses the Customer Number as the unique identifier for each customer: different customers can have the same email address. Because of this difference, the CS Module sometimes adds duplicate customers in AbleCommerce. To make sure that we do not get duplicate customer entries in AbleCommerce (causing errors for people trying to register or log in) we run a script at the end of each CS Module update that checks for duplicate customers and combines their records in AbleCommerce. The options below will ensure that the correct MOM customer information is kept. For more information, contact Web 2 Market.

- 23. ⊗ Eliminate Duplicate Records – Should the script to combine duplicate users based on their CustNum and UserName be run after the update? (Default – Yes)
.....
- 24. ➔ CustNum to Keep – If there are duplicate entries for a user, which Customer Number should be kept with the main record? (choose one option) (Default – User with most recent activity)
..... User with most recent activity []
.....Greatest CustNum []
.....Lowest CustNum []
.....User created first []
- 25. ➔ CustNum to Keep – If there are duplicate entries for a user, which UserName and Password should be kept with the main record? (choose one option) (Default – User with most recent activity)
..... User with most recent activity []
.....Greatest CustNum []
.....Lowest CustNum []
.....User created first []
- 26. ⊗ Only Keep Email Address UserNames – If Yes is selected here only Email Address UserNames will be kept. Email address UserNames will not be overwritten by non-Email UserNames when eliminating duplicates. (Default – Yes)
.....

Shipping Options: These options will determine how orders are assigned to shipping methods and shipping gateways. Please fill this information as completely as possible.

Shipping options can get complicated. The Customer Service Module uses three coordinated lists of shipping methods to determine how shipping methods for orders should be displayed in AbleCommerce. The first list should contain all of the MOM Shipping Method Codes that may appear in the MOM export. The second list contains the AbleCommerce Shipping Gateways that correspond to each MOM Shipping Method. The third list contains the AbleCommerce Shipping Methods that correspond to each MOM Shipping Method. Each of these lists must have the same number of elements.

Most of our clients find it easiest to enter all of their MOM Shipping Codes first. Once the MOM Shipping Codes are entered, enter the corresponding Shipping Gateway and Shipping Methods from AbleCommerce.

The available AbleCommerce Shipping Gateways are:

- AbleCommerce Shipping: 1
- UPS: 2
- FedEx: 3
- USPS: 4
- CanPost: 5

*NOTE: Because this section of the Customer Service module is only used for shipment tracking and display purposes, the methods entered here do not have to correspond to actual shipping methods available to your online customers when they check out in AbleCommerce. **The most important part of this section is matching the MOM Shipping Code to the correct AbleCommerce shipping gateway (UPS, FedEx, etc.).***

Please fill in the areas on the following pages as completely as possible. If you do not know the exact AbleCommerce shipping methods that correspond to your MOM Shipping Methods, enter a descriptive name. Attached to the end of this questionnaire is a helpful guide that displays the available AbleCommerce shipping gateways and their available shipping methods. If you have any trouble at all, please contact Web 2 Market.

27. → Shipping Methods

MOM Shipping Method Codes Example: UPG	Shipping Gateways (Shipping Carrier) UPS (2)	Shipment Method Codes (Name) UPS Ground (03)



28. Default Gateway – Choose the default gateway to use if no match is found in the MOM Shipping Methods list. (choose one option) (Default – UPS)

-AbleCommerce []
- UPS []
-FedEx []
- USPS []
- CanPost []

29. Default AbleCommerce Shipping Method Code – Enter the default Shipment Method Code to use if no match is found in the MOM Shipping Methods list. See the attached Shipping Method Code Help for more information. (Default – UPS Ground '03')

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Thank you for taking the time to fill out this questionnaire. Doing so will help us to quickly configure your Customer Service Module. If you had any problems filling out any of the sections, please contact Web 2 Market. If we need clarification or have any questions, we will contact you.

<http://www.web2market.com>

(708) 653-3100



Company Information

Finally, please take a few minutes to fill in the company information below so we can keep all of our records together. Thank you for your cooperation.

Company: _____

Store Name: _____

Web Address: _____

Store Address: _____

Contact Name: _____

Phone Number: _____

Fax Number: _____

Email Address: _____

Comments: _____



Shipping Method Code Help for AbleCommerce

AbleCommerce Shipping Methods - Gateway ID: 1

Ship Method Name

Ship Method Code

These are your custom AbleCommerce Shipping Methods. They may be Flat Rate methods like 'Free Shipping' or your custom Weight Matrix or Value Matrix shipping methods.

NOTE: AbleCommerce Shipping Methods can vary from store to store. Please Contact Web 2 Market for the AbleCommerce Shipping Method Codes.

UPS Shipping Methods - Gateway ID: 2

Ship Method Name

Ship Method Code

Next Day Air®	01
2nd Day Air®	02
UPS Ground	03
Worldwide ExpressSM	07
Worldwide ExpeditedSM	08
Standard	11
3 Day Select®	12
Express Saver	12
Next Day Air Saver®	13
Next Day Air Early A.M.®	14
Worldwide Express PlusSM	54
2nd Day Air A.M. ®	59

FedEx Shipping Methods - Gateway ID: 3

Ship Method Name

Ship Method Code

FedEx Priority	PRIORITYOVERNIGHT
FedEx 2day	FEDEX2DAY
FedEx Standard Overnight	STANDARDOVERNIGHT
FedEx First Overnight	FIRSTOVERNIGHT
FedEx Express Saver	FEDEXEXPRESSSAVER
FedEx 1day Freight	FEDEX1DAYFREIGHT
FedEx Overnight Freight	FEDEX1DAYFREIGHT
FedEx 2day Freight	FEDEX2DAYFREIGHT
FedEx 3day Freight	FEDEX3DAYFREIGHT
FedEx Express Saver Freight	FEDEX3DAYFREIGHT
FedEx Home Delivery	GROUNDHOMEDELIVERY
FedEx Ground	FEDEXGROUND
FedEx International Priority	INTERNATIONALPRIORITY
FedEx International Economy	INTERNATIONALECONOMY



FedEx Shipping Methods (continued) - Gateway ID: 3

Ship Method Name	Ship Method Code
FedEx International First	INTERNATIONALFIRST
FedEx International Priority Freight	INTERNATIONALPRIORITYFREIGHT
FedEx International Economy Freight	INTERNATIONALECONOMYFREIGHT

USPS Shipping Methods - Gateway ID: 4

Ship Method Name	Ship Method Code
Express Mail	EXPRESS
First Class	FIRST CLASS
Priority Mail	PRIORITY
Parcel Post	PARCEL
Bound Printed Matter	BPM
Library Mail	LIBRARY
Media Mail	MEDIA

CanPost Shipping Methods - Gateway ID: 5

Ship Method Name	Ship Method Code
Regular Parcel	1010
Expedited	1020
Xpresspost	1030
Priority Courier	1040
Expedited Evening	1120
Xpresspost Evening	1130
Expedited Saturday	1220
Xpresspost Saturday	1230
Surface US	2010
Air US	2020
Xpresspost US	2030
Purolator US	2040
Puopak US	2050
Surface International	3010
Air International	3020
Purolator International	3040
Puopak International	3050

NOTE: If your MOM Shipping Method does not match one of these methods exactly, do not worry. The most important aspect is that the correct AbleCommerce Shipping Gateway is entered.