

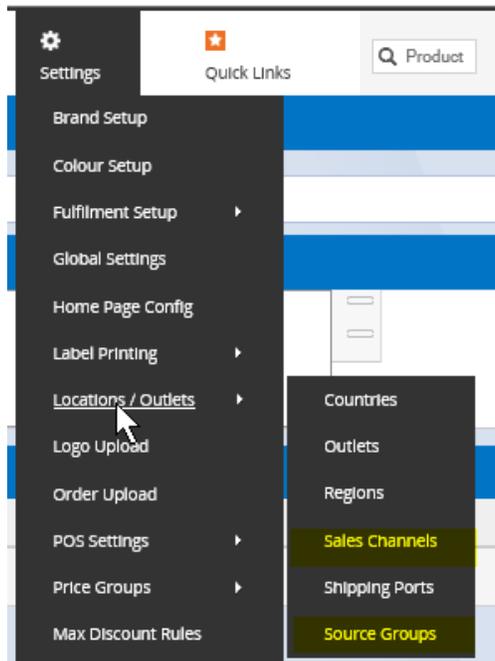
## 1 Enable Retail Express Products for Export

### 1.1 Setting Up Source Group and Sales Channel

The system **must** have a Sales Channel and Source Group assigned and we recommend the below defaults:

SOURCE GROUP :       WEB  
SALES CHANNEL :       ONLINE  
SALES CHANNEL ID:     Please confirm if **1** (or other)

***Set from Settings – Locations/Outlets – Sales Channels and Source Groups.***



**Source Group →**

Insert/Edit Source Groups	
Name	WEB
Apply Source Priority	<input checked="" type="checkbox"/>
<input type="button" value="Update"/> <input type="button" value="Reset"/>	

**Remember to attach all Outlets with available stock**

**Sales Channel →**

Insert/Edit Channel	
Name	ONLINE
Primary Sales Outlet	<input checked="" type="checkbox"/> Adelaide Hills
Default	<input checked="" type="checkbox"/>
Source from PO Threshold	<input type="checkbox"/>
<input type="button" value="Update"/> <input type="button" value="Reset"/>	

**Sales Channel ID →**

Channels	
Channel ID	Channel Name
1	ONLINE

Multiple Web Sites, will require multiple Sales Channels but please be aware of a limitation of 3 as the REX API has a lockout of 6 hours for detailed stock information making more than this impossible currently.

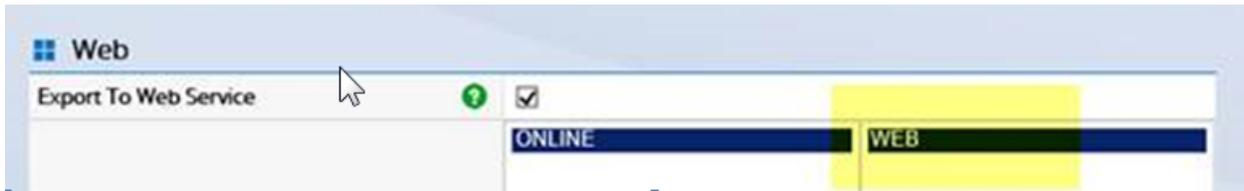
SOURCE GROUP :      WEB              WEB  
 SALES CHANNEL :    WEBSITE1      WEBSITE2

### 1.2 Marking Inventory for Export - Individually

**Select from Inventory – Product Search – Then Click on the Product ID link to edit**

Then under the heading Web select "Export To Web Service" by ticking *the check box*.

The product **must** also have a Sales Channel and Source group assigned, which means clicking on "ONLINE" and "WEB" to highlight them in blue.



### 1.3 Marking Products for Export – Bulk Update

In most cases you will want to use a much quicker way to mark many products by using the mass Download and Mass Upload method.

**Set from Inventory – Mass Download and Mass Upload**

The last columns in the exported Excel spreadsheet will have columns marked: "ExportToWebService" and Channel:ONLINE. These items need to be marked as "TRUE" and WEB and then copied down to all rows that have products to be shown in the Webstore.

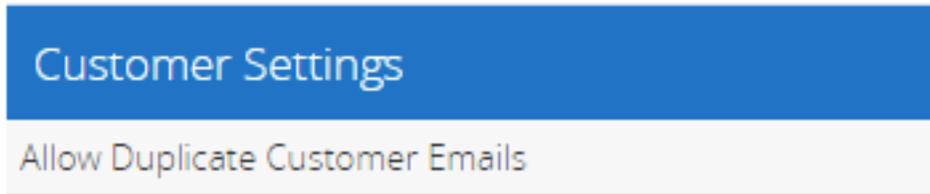
an	Boolean	Text (lookup)
'	False / True	100 chars
led	ExportToWebService	Channel:ONLINE
ALSE	TRUE	WEB
ALSE	FALSE	



### 2 Remove “Allow Duplicate Customer Emails” option

Within Retail Express please untick the option “Allow Duplicate Customer Emails”

(Under Settings – POS Settings – Customer Settings.



**This is important to allow orders from the E-Commerce site to be attached to the corresponding customer in Retail Express**

### 3 Pricing – The Hierarchy

The following hierarchy is setup for version 3.4 and above (which no longer supports promotional pricing)

1. If there is a **Web Price**, use this price
2. If there's an Outlet specific **Discount Price** specified within the Primary Sales Outlet and it is within a valid date range, use this price however make sure it is not discounted past the maximum discount rule imposed for the product (if any)
3. If there's an Outlet specific POS Price for this product at the outlet that has been selected as the Primary Sales Outlet, use this price
4. If there's a Master **Discount Price** (on the Main tab of the product rather than on the outlet tab) and it is within a valid date range, use this price however make sure it is not discounted past the maximum discount rules impose for the product (if any)
5. Use the **Master POS price** (on the main tab of the product)

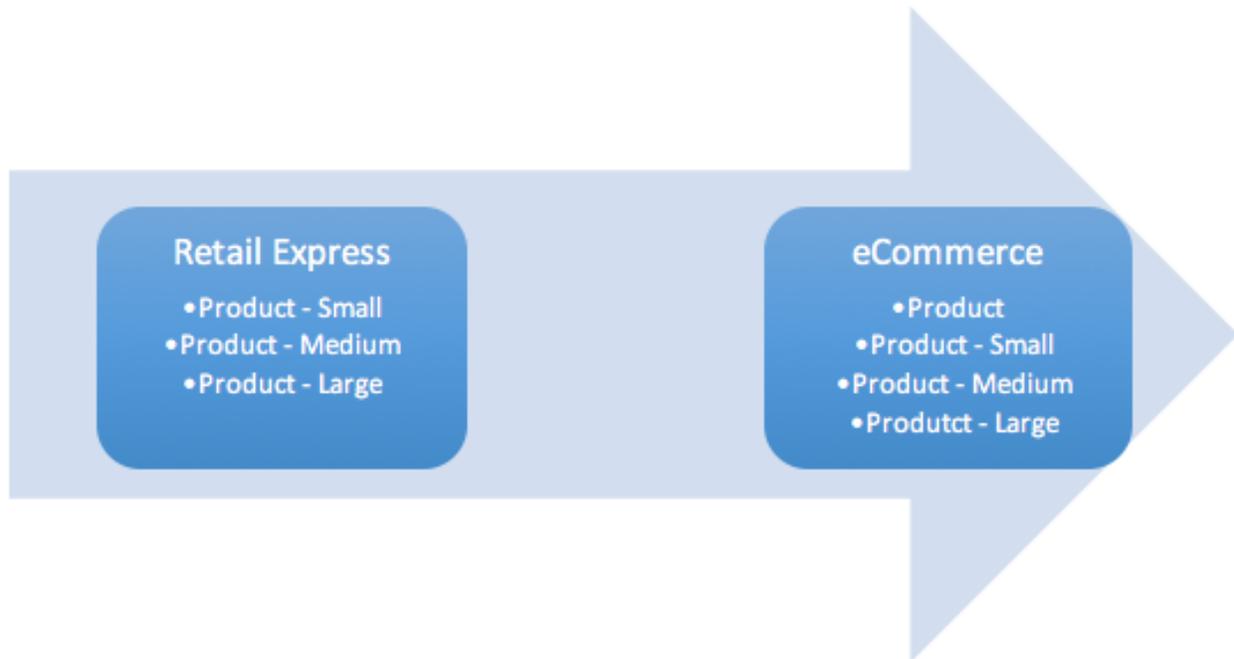
The RRP is mapped to the Compare at Price. It is up to your theme developer to work with these correctly regarding the presentation of crossed out prices etc.

Markup Target %		<input type="radio"/> Calc POS by % Markup Target.
POS Price (Inc Tax)	920	<input checked="" type="radio"/> Fixed Price
Date POS Price Changed	23/05/2016	
Promotional Price (Inc Tax)		
Promotional Price Expiry		
Maximum Discount Rule	None	
Web Price (Inc Tax)		
RRP (Inc Tax)		
Freight Cost (Inc Tax)		

We copy the RRP to the Compare at price in your eCommerce system.

POS Price (Inc Tax)	3	<input checked="" type="radio"/> Fixed Price
Date POS Price Changed	23/05/2016	
Promotional Price (Inc Tax)	1	
Promotional Price Expiry		
Maximum Discount Rule	None	
Web Price (Inc Tax)		2
RRP (Inc Tax)	<b>Compare At Price</b>	
Freight Cost (Inc Tax)		

### 3 Product Variants Explained – Grouping a product by Style



The ability to group products together offers many benefits:

- Search and product pages aren't cluttered
- Your customers can see available size/colour variations on the one product page
- You only have to maintain one product

You may have multiple products that come in multiple variations, such as sizes and colours, but choose to display the product only once on your web store with a drop down selection of the various attributes.

You can group your products together on your website automatically using the ManufacturerSKU in Retail Express.

The Manufacturer Code from Retail Express is used to group the variants in ECommerce as shown below by "Product". This SKU is the link between Retail Express and ECommerce and the Supplier SKU, which includes variants such as size, links each product to its corresponding product in ECommerce.



### Retail Express Example

As shown below, In Retail Express the Product group is the **Manufacturer SKU**, whereas the **Supplier SKU** includes the size variants.

ProductId	SKU – Supplier SKU	Manufacturer SKU (or Code)
139996	MPL5CMP1410556MULXS	MPL5CMP1410556MUL
139997	MPL5CMP1410556MULS	MPL5CMP1410556MUL
139998	MPL5CMP1410556MULM	MPL5CMP1410556MUL
139999	MPL5CMP1410556MULL	MPL5CMP1410556MUL

### E-Commerce

In E-Commerce the Manufacturer SKU is used as the Product Group and the Supplier SKU’s are variants that correspond to other options, such as size in the below example. The Retail Express Supplier SKU is referred to in the E-Commerce site as the SKU

Product Group	Title
MPL5CMP1410556MUL	MINK PINK PRETTY PETALS PLAYSUIT - MULTI

### ECommerce Variant

barcode	option1	position	price	product_id	sku
139996	XS	1	37.48	941404545	MPL5CMP1410556MULXS
139997	S	2	37.48	941404545	MPL5CMP1410556MULS
139998	M	3	37.48	941404545	MPL5CMP1410556MULM
139999	L	4	37.48	941404545	MPL5CMP1410556MULL

This is how it looks in E-Commerce and each product’s SKU will link to the Retail Express Supplier SKU.

### Variants

[Reorder variants](#) [Edit options](#) [Add a variant](#)

<input type="checkbox"/>		Title	Inventory	Price	SKU	<a href="#">Edit</a>	
<input type="checkbox"/>		XS	3	\$37.48	MPL5CMP1410556ML	<a href="#">Edit</a>	
<input type="checkbox"/>		S	2	\$37.48	MPL5CMP1410556ML	<a href="#">Edit</a>	
<input type="checkbox"/>		M	0	\$37.48	MPL5CMP1410556ML	<a href="#">Edit</a>	
<input type="checkbox"/>		L	0	\$37.48	MPL5CMP1410556ML	<a href="#">Edit</a>	

When you group your products using the ManufacturerSKU, your web store will create the following products:

**Configurable / Variable product:** the "parent" of the group, and the product that needs to be maintained. This will be displayed to the visitors to your site with options below it. The SKU code that will be created on the web store for this product will be POS-SupplierSKU for each variant.

**Simple product:** the individual products as per Retail Express, containing information on pricing and inventory levels. The SKU code that will be created on the web store for these individual products will be POS-SupplierSKU.

Things to bear in mind:

- Any product in Retail Express that does not have a ManufacturerSKU won't be grouped, and a simple product will be created.
- Any product that is grouped in Retail Express with a ManufacturerSKU **MUST** have a unique size/colour variation, otherwise an error will occur during the synchronisation of the web site. For example, you cannot have two products grouped together that are both size 10 in blue.

### How to group your products

The following checklist will help you to determine if you need to group your products together or not:

***Do you have the same products with size variations?***

Matching products with size variations can be grouped together, even if they don't have different colours. Simply leave the colour field blank. If you do use a colour for one product, then all products will need to have a size as well (they can be the same colour, as long as there is not the same size/colour combination)

***Do you have the same product but with colour variations?***

Similar to the sizes, products with different colours in the same size, or different sizes, can be grouped together.

***Do you have a lot of configuration options beyond size and colour?***

We have found that once you exceed a couple of options mistakes are common. Images rarely reflect the choices made and can fool the customer. In these instances you should consider separating the products by varying the ManufacturerSKU

***Do you want your customers to see each variation as an individual product?***

If you want each product's size/colour variation to appear as an individual product, you should not group your products together.

## Product Attributes – Size / Style

Retail Express has product attributes that can synchronise to your web store, and displayed on the product page or used to assist in searching or categorisation if desired.

- Size (drop down)
- Colour (drop down)
- Season - Text
- Brand - Text
- Product Type (please note this is separate to your categories)

Your web store can have these configured to display on the sidebar or top of your product page or searching pages. Your customer will be able to use the attributes to filter their products and refine their search results.

More options - tags



SmartTags are a feature of Translator that allows you to define your own reasons for having tags. One of the most common requests is a “SALE” tag. But others can include anything you would then like to use to create a “Smart Collection” in Shopify that uses the tags to build a collection of products. “Made in NZ” for certain suppliers etc.

To create your attribute list in Retail Express:

- Navigate to Menu > System Settings.
- Click on the Menu option for your attribute e.g. Size Setup
- Enter the details and in the appropriate field and press Insert
- Repeat for any additional options

To update your products with new attributes you can apply them individually to each product by opening the product, selecting the new settings, and saving the product again.

If you have multiple products to update, a more efficient method would be to use the Mass Download feature in Retail Express.

## 4 How do Sales Channels work?

### Overview:

Sales Channels addresses the question:

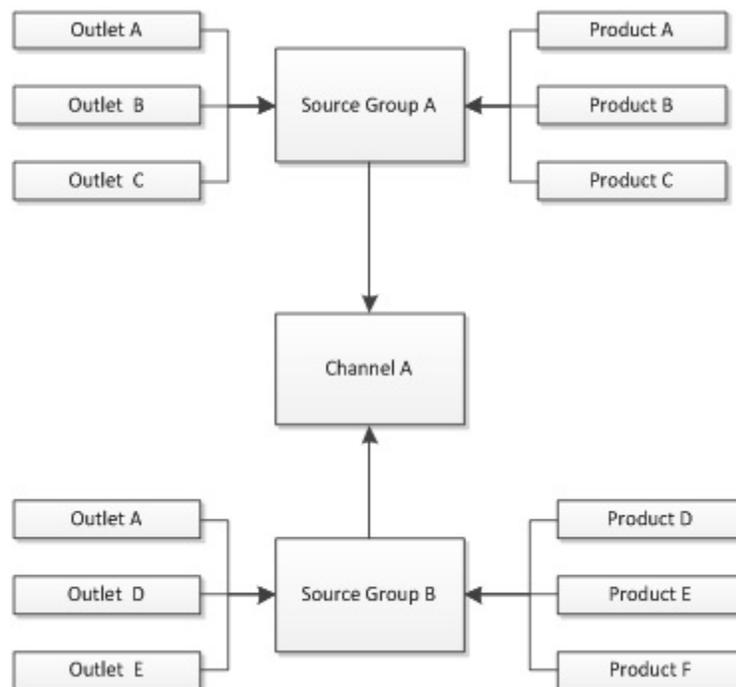
**Into which outlet do I want my sales to be entered, my pricing to come from, and my inventory from which source groups?**

The best use of this is when you have multiple web stores all connected to the same Retail Express database. Using Sales Channels, you can specify a particular outlet for your sales to be entered against so that you have visibility of the sales from each web site. You can also maintain different pricing for each store, and a different inventory levels by picking and choosing various source groups.

All of this is completed through a Retail Express feature where the user combines their Source Groups into "Channels".

For each channel and it's associated outlets, you will need to set one outlet to receive orders into and base web store pricing from. This outlet is known as the **Primary Sales Outlet**.

Assigning one or more **Source Groups** to the Sales Channel will allow the user to control which outlets contribute their stock count to the channel's available stock i.e. how many products are available to sell online.



### Example situations:

A retailer with only one outlet, Outlet A, sets up a web store.

- **One Sales Channel, with Outlet A as the Primary Sales Outlet.**



- They will also need one source group with Outlet A assigned to the group.

A retailer with multiple stores and a warehouse would like all web store sales to be entered into the warehouse for processing, but the stock from their stores should be included for sale online as well.

- **This retailer will need one Sales Channel with the Warehouse as the Primary Sales Outlet**
- **One Source Group with the warehouse and all stores in the Source Group.**

A retailer with multiple stores and a warehouse would like all web store sales to be entered into the warehouse for processing. They have bulky products that can only be shipped from the warehouse (although the stores sell them, the Retailer doesn't want to ship from there). They do have smaller objects that can come from either the warehouse or the smaller retail stores.

- **One Sales Channel with the Warehouse as the Primary Sales Outlet**
- **Two Source Groups, one for the Bulky Products, and one for everything else. All bulky products are associated to the bulky source group only, other products to the other source group**
- **The sales channel will have both source groups selected**

[Where to maintain your settings:](#)

Source groups are maintained via **Menu > System Settings > Locations/Outlets > Sales Channels**. For more information on setting up your Source Group, you should refer to your Implementation Console.

[How do source groups work?](#)

Overview:

When looking at setting up Source Groups, you need to first answer the following question:

**Where does the stock for my web store get fulfilled from?**

Source Groups allow you to control exactly where your products are sourced from when they're sold online. Answering the above question will prepare you for creating your Source Groups within Retail Express.

For example, you may have a warehouse that is purely for web store inventory and not your Retail outlets. Using source groups you could ensure the web store stock comes from the warehouse first, and only if sold out there it can be sourced from individual Retail stores. Your Retail stores will continue to operate as normal with their own inventory.

Source groups can also be used to calculate the estimated time of arrival (ETA) by factoring in any incoming Purchase Orders, as well as creating automatic Internal Transfer Orders (ITOs) when products need to be transferred between stores as a result of a sale placed online (please note these ITOs will need to be processed manually as part of processing online sales).



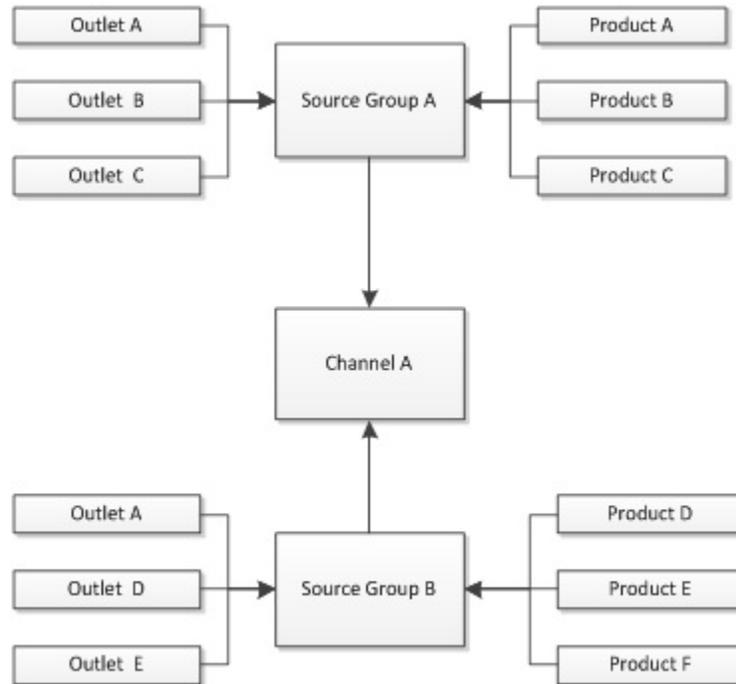
Once a source group has been created, you will be able to select the source group for your site via the Sales Channel (refer to the article on Sales Channels for more information).

Rules for a source group:

- Each source group can have multiple products
- For an individual product, only one source group can be selected for each sales channel (for example, for Sales Channel A, source group A may be selected, but for Sales Channel B a different source group may be selected). This typically only applies for customers running multiple web sites from their Retail Express database.
- The same outlet may be selected in multiple source groups
- Outlets can be ordered in a hierarchy to control from which outlets the products are taken first

In the example below, the web site has been set up to have the Sales Channel "Channel A", with the source groups "Source Group A" and "Source Group B" selected.

**Please note - single store retailers with an online store will still require at least one Sales Channel and Source Group - without this information product will not be able to synchronise.**



### Examples:

#### One Source Group:

Best used where there is a single outlet, or multiple outlets with a specific order priority but all products follow the same pattern e.g. take from store A first, then store B, then store C and so on.

#### Multiple Source Groups:

Where there are products that are not available in specific outlets, or should be sourced in a different order from other products, you can set up a source group to control the outlets the products are available from. Bulky products are a great example of this, where they can only be sourced from specific warehouses and not individual retail stores.

#### Where to maintain your settings:

Source groups are maintained via **Menu > System Settings > Locations/Outlets > Source Groups**. For more information on setting up your Source Group, you should refer to your Implementation Console.