Partners Together For Better Solutions

IDN Advisory Council

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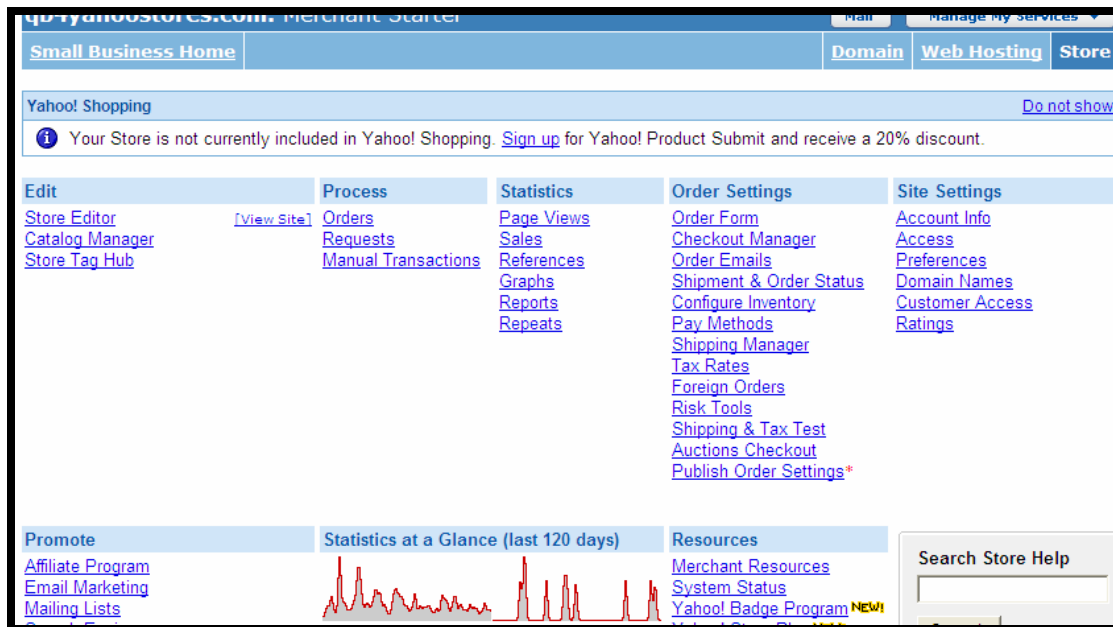
The World of Ecommerce - Entry Level Order Importers

Now that we know some of the challenges eCommerce clients face, let's take a look at the first step towards helping them become automated and efficient. You may have a new eCommerce Store Owner, or an established one who has been manually keying order information into QuickBooks, or only printing hard copies to put in a folder.

We are going to be using Yahoo! as our example throughout this series, for more information, visit: http://smallbusiness.yahoo.com/merchant/compare.php. Most packages are quite similar in terms of the 'back-end' … i.e. they have a way to build a website, process orders, charge credit cards, basic CRM abilities, and very basic reports. Many of the tools we will be discussing the next few months integrate with Yahoo and many other web-platforms/shopping carts, or can be configured to do so; and there are 'all-in-one' packages such as ProStores (http://www.prostores.com) available. It would be impossible to cover all the differences, pros, cons, and everything in between effectively; however, you will have a great insight as this series continues.

A Look Inside the Control Panel …

All packages have a 'Store Manager' or 'Control Panel' that allows you to manage your site; below is a screenshot of the Yahoo Store Manager for a **Merchant Starter Store:**
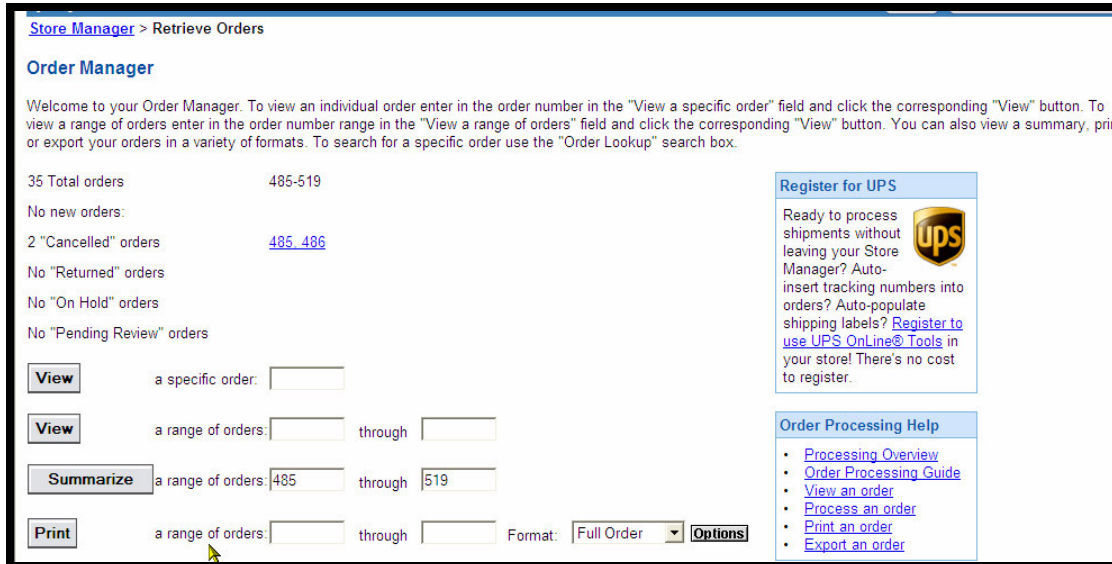

As you can see, you can access any module from this 'home page' … other packages have pretty much the same layout.
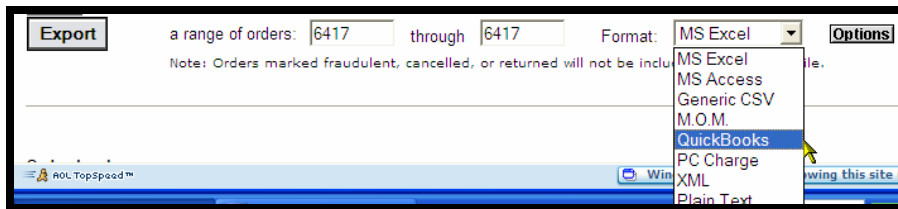
Included with most on-line stores is their own '**Order Manager**' … For instance, if you click on Process ->Orders within Yahoo, you will see:

The above 'Order Manager' does not have the same functionality or features that the add-on programs offer; however they fill the basic needs of the store operator and many use what's included in their package for years before they integrate another program.

Note: The above is a Merchant Starter Package, which does not allow you to export a range of orders easily. With the next two levels there is an additional option to export orders on the same screen; allowing for an easy way to batch export orders.

There is where it gets 'interesting' … because only a few of the above export formats will actually include all of the order information. The QuickBooks export is exported as an .iif file, and comes with a lot of 'issues.' If anyone is interested in more specifics on this, please contact me directly ☺

So if I can export the orders free, why do I need an Order Exporter/Importer?

That's a great question! While you can export your orders from your site in many cases, the import into QuickBooks tends to be messy, manual, and error prone. For instance:

➢ Fraud and Canceled orders are exported like a regular order, and imported into QuickBooks using the .iif format; you must be sure you go through and delete those out of your QuickBooks… don't forget!
➢ If the Items do not match **exactly** in QuickBooks to your store, new items will be created. That might not sound bad; however, they are created as a *Service Item*, with no accounts assigned…yuck! You can't change a Service type item, so it's extremely time consuming to clean up the Item List.
➢ Sales Tax is not imported properly; that is ***never*** a good thing.

- ➢ Phantom accounts are created in your Chart of Accounts that you cannot get rid of.
- ➢ The information comes in as an Invoice & Payment, the link is broken, and so you must manually go back and put the 'checkmark' in to re-link the transactions.
- ➢ If you do not have the 'auto-tax fix'***** in place, your orders will not import at all if you are using QuickBooks 2003 or higher. ****I have an article on how to fix the auto-tax issue so you can get your orders in, we will make it available in both the Advisor and Developer Resources section.***
- ➢ An 'employee' is created in QuickBooks for Yahoo!
- ➢ Each customer and item will be imported, filling up QuickBooks quickly once a store has become established. Reaching the List limits can create havoc; and tends to happen at the busiest time of the year for an eCommerce merchant.

I could go on, but I'm sure you get the picture. It's not just Yahoo store owners that deal with these issues; almost every platform has similar challenges, some are worse… offering NO exporting capabilities.

There have been a few options over the years; very few. Most owners are dealing with the .iif export/import feature within Yahoo, entering information manually or not at all, or they wait until they grow to the point they need a full-blown Order Manager. Some will purchase/integrate a program that offers a lot of features they do not need, just to get the orders entered correctly. There are also a few options that use .iif; which while they may be a great program; we cannot profile them at this time.

The Choices Now Available and How They Differ

The good news! There are a few programs out there that have taken on the challenge of getting orders out of Yahoo and into QuickBooks; and yes, it was a challenge! I encourage you to visit each Developer's website, or contact them directly, so you can discuss all the features that we cannot cover here. Next month we will discuss programs that offer additional features and flexibility; those for Entry to Mid-Level clients; this month we are focusing on **Order Importers**.

*I feel it is important to mention that all of the tools we will be discussing are those that I am quite familiar with, and have included my experience in using them, as well as the client's experiences. If **any Developer** has a tool that will accomplish the issues we are discussing**, please contact me!** We are always looking for available solutions to offer the client; **in the end, it's all about the client and what works for them.** Also, as these tools are upgraded, we would like to inform our readers, so please let us know when you add features.*

There are several things as a ProAdvisor that I consider when recommending a product:
- ➢ Ease of Set-up and Use
- ➢ Features, Functionality, and how well it fits into the business model of that client
- ➢ Customer and Technical Support
- ➢ Flexibility
- ➢ Training options
- ➢ Pricing and Scalability
- ➢ I cannot stress this enough … EASE of use for the end-user! We have pages and pages of challenges the eCommerce client is already dealing with; they are typically **not** a programmer, so the program **MUST** be intuitive.

In alphabetical order, let's look at three options other than the manual one available within Yahoo. Screenshots, demos, and additional information can be found on the Developer's site; links are included below. I've added a star rating of 1-5; 5 being the highest. To be fair, each program was tested with the same 30 orders (xml format from Yahoo Standard export); with 4 duplicate orders already in QuickBooks and with the newest version available for download.

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BayStateConsulting.com - 01 Transaction Pro Import Wizard – eCommerce Edition
http://www.baystateconsulting.com/products/01eTxnPro.asp
Requirements: QuickBooks 2002 and higher, 2003 (CA, UK, AU) and above
Cost: $129 (The $199 price is for the next level; you may have to e-mail them for the Yahoo Edition)
Rating: ★★★★

Pros:
- ✓ A working demo for 30 days that you can use with the Rock Castle Construction sample company file; fully functional
- ✓ On-Line User-Forum
- ✓ Easy Set-up, low learning curve, and good customer support
- ✓ Orders can come in as an Invoice or Sales Receipt
- ✓ Data Grid that allows editing, if needed, before sending the data to QuickBooks
- ✓ Map the fields once and it can be saved
- ✓ Items not in QuickBooks will be made on the fly, you can select Inventory or Non-Inventory as the type
- ✓ Additional accounts will be made automatically and correctly (Discounts, Shipping, etc.)
- ✓ Flexibility to add Class, Sales Rep, and a few other additional fields that are handy in eCommerce
- ✓ Posts data quickly, saving valuable time
- ✓ Good Price

Cons:
- ✓ QuickBooks must be open before you launch the program
- ✓ Cannot resize the Grid; scrolling is necessary
- ✓ Cannot save multiple mappings at this time
- ✓ Was not able to create a 'double-sided' Non-Inventory item; which hopefully will change in the next revision
- ✓ Error codes are difficult to understand and client may need to call/e-mail for support if they encounter one
- ✓ If the Import hits a snag, there is no log that can be saved, it aborts … this causes some frustration and time delay
- ✓ Order duplication is not checked at this time, so it's easy to import the same order multiple times
- ✓ Cannot be used/licensed on a machine with a Mirror Raid configuration
- ✓ License is tied to each machine, so you need multiple licenses if you work from a desktop and laptop

Overall Impression:

It is a nice program with a great deal of potential. I believe several of the items listed in the 'Cons' will be addressed in future releases. The Developer values client/user feedback and offers remote sessions for training and set-up. It ranks 2nd for intuitive nature, price, and ease of use. Baystateconsulting.com has several other tools that are fantastic and I fully expect this one to develop over the next few months. The 'look and feel' of the program is similar to Excel, so end-users will be comfortable and will not be intimidated when they launch the program. Once it is mapped/configured to the user's specifications, they will not have to worry about it again unless they open a 2nd site and require multiple mappings.

21 of the 30 orders imported; a few attempts were needed, and I could not decipher the error code that caused the problem. I also had duplicate imports (it did not recognize the original 4 duplicates) and I could not use it on my main machine (Mirrored RAID). However, overall this was quick, painless, and I feel it will be improved within a minimal timeframe. I am very impressed with this program, and it has a definite place in the eCommerce world.

QODBC.com – Qintegrator (formerly QDashboard)

http://www.qodbc.com/QIntegrator.htm

Requirements: QuickBooks 2002 or Higher

Price: $199

Rating: ⭐⭐½

Pros:

- ✓ A working demo for 30 days
- ✓ Multiple Templates included
- ✓ Import Test can be run so you know about problems and have the opportunity to 'fix' them beforehand
- ✓ Orders can come in as an Invoice or Sales Receipt
- ✓ Log of results once import is complete is generated
- ✓ Configure multiple templates and save; nice if you have multiple sites
- ✓ Items not in QuickBooks will be made on the fly, select Inventory or Non-Inventory as the type
- ✓ Non-Inventory types can be created as 'double-sided' items
- ✓ Flexibility on how Customer Names are added (generic, date, full name)
- ✓ Flexibility to add Class, Sales Rep, and a few other additional fields that are handy in eCommerce
- ✓ Checks for duplicated Orders and will skip them; a big plus
- ✓ Checks/Skips Fraud or Canceled Orders

Cons:

- ✓ Intimidating to the end-user, the 'look and feel' is not targeted towards the typical user
- ✓ Users probably cannot map the fields without assistance from someone who is somewhat proficient with computers/software, or this particular program
- ✓ Error codes can be difficult to understand and client may need to call/e-mail for support if they encounter one
- ✓ License is tied to each machine, so you need to purchase multiple licenses if you work from a desktop and laptop
- ✓ Customer/Technical support has been extremely slow
- ✓ Posting of data seems slow
- ✓ Updates tend to 'break' the program
- ✓ Import stops if an error occurs, such as a missing account; it does not add them
- ✓ Numerous errors that could not be deciphered; and there is no User Forum or Knowledgebase to refer to
- ✓ Interface will seem "unfriendly" to end users
- ✓ Price is a bit to high for entry level businesses

Overall Impression:

It has a lot of nice features; however, the typical user will not be able to download this, set it up, and use it without assistance from the company. The Developer offers remote sessions for training and set-up; however, there is a wait and difficult to reach someone. Multiple templates can be saved, but again, the typical user will not be able to do this on their own. It does work on the Mirrored RAID configured machine; however it took well over an hour and many attempts to test our 30 orders, with no success. It ranks last for intuitive nature, ease of use, and price.

Of the 30 orders, it recognized the 4 duplications; however **None** of the orders were imported. The error had to do with 'error parsing complete XML return string.' After over an hour and no orders imported using this program, I was quite frustrated and disappointed. With all the features available, an easier user interface would go a long way.

The SuperManager – Lite Version
http://www.thesupermanager.com/smliteqb.html
Requirements: QuickBooks 2002 and higher
Also supports the Canadian version of QuickBooks & QuickBooks POS
Cost: $99
Rating: ★★★★★ +

Pros:
- ✓ A fully functional demo for 30 days, including the Full Version of their OM
- ✓ On-Line User-Forum & Quick Start Guide
- ✓ Easy Set-up, low learning curve, and great customer support
- ✓ Right-Click to easily access additional features, interface is similar to programs most already use
- ✓ Orders can come in as an Invoice or Sales Receipt
- ✓ Prompts you to skip Fraud, Canceled, and On-Hold orders
- ✓ Mapping the few basic settings in the program takes about 10 minutes, and if you have multiple stores you can replicate the database easily
- ✓ Items not in QuickBooks will be made on the fly, you can select Inventory or Non-Inventory as the type
- ✓ Additional accounts will be made automatically and correctly (Discounts, Shipping, etc.)
- ✓ Flexibility to add Class, Sales Rep, and a few other additional fields that are handy in eCommerce
- ✓ You can have more than one database open at a time; a great time-saver
- ✓ Additional licensing is not needed at the moment; so you can load it on your desktop and laptop
- ✓ Works on a Mirrored RAID system
- ✓ Company is eCommerce based; so they understand the challenges of an eCommerce client
- ✓ A log is generated that can be printed (or saved) that shows the status of what was skipped, imported, or items added
- ✓ User can import Yahoo batches if client does not want to bring Sales Information into QuickBooks
- ✓ Will populate QuickBooks with Items from the Yahoo store with one click (Get Products)
- ✓ Can bring in individual customers, use a generic name, or use the date (my favorite; 365 'customer names' a year … however all of the information is contained on the Sales Receipt. Others can be configured this way, but not as easily).
- ✓ Option to use a generic Item name and track items inside their program if desired
- ✓ Checks for duplicate orders and will prompt you to skip them
- ✓ Variants can be assigned to deal with items that include sub-sku's or options; which will keep the Item list much cleaner
- ✓ Option to easily upgrade to the full version if, or when, needed
- ✓ Offers several eCommerce specific settings and features as part of the base program, with a seamless integration between Yahoo and QuickBooks

Cons:
- ✓ Error codes can difficult to understand and client may need to call/e-mail for support if they encounter one; however errors are few and far between and offer a good deal of information
- ✓ It can be overwhelming to the end-user when they first open the program because they have all the features of the full-version
- ✓ A few Windows cannot be resized, however the main ones can be
- ✓ Works mainly on the Yahoo platform
- ✓ Some of the wording could be revised so it reads less like 'programmer talk'

Overall Impression:

It is a great program at a wonderful price. I believe several of the items listed in the 'Cons' will be addressed in future releases. The Developer values client/user feedback and offers remote sessions for training and set-up. It ranks 1st for intuitive nature, ease of use, functionality, features, overall usability.

All 26 orders were imported with success on the 2nd attempt, and a log was generated for reference. It recognized the 4 duplicates that already existed in QuickBooks and prompted me to skip them; the log included that information as well. It took about 15 minutes to download, install, add a few accounts, and map the fields necessary to import the orders. This is one program that I can't say enough great things about. They have done an excellent job at providing a program this is a perfect fit for entry to mid-level clients. It will ease mid-level clients into the world of automation; and once they are comfortable with that level they can seamlessly upgrade to the full version of their order manager. I would not be surprised to see them develop a third level at some point in the near future.

Be sure to read the Developer Interview this month, the **SuperManager Lite** version is featured so you can learn more about this awesome program.

Conclusion

I have set up hundreds of clients using many programs over the years; and doing it the manual way when that was the only option. It is exciting to see new programs on the market, and established ones grow and make progress. Next month we will be reviewing three programs that fit into the Mid-Level market; they offer more than importing orders, automating other areas of the eCommerce business. We will also keep you updated as the programs featured this month progress and offer new releases/features.

Until next month,
Rox ☺