Moneris

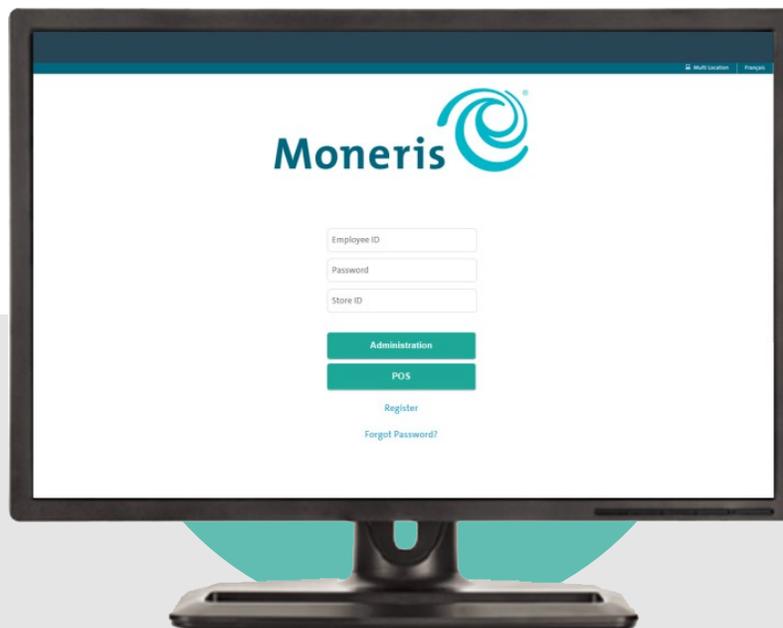**BE PAYMENT READY**

PAYD Pro Plus®

Inventory Import and
Management with Bookmark

BE PAYMENT READY

Need help?

Visit Moneris Support **or call** 1-866-319-7450

Bookmark: bookmark.com/help_center

Record your Moneris® merchant ID here:

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Contents

Inventory import and management

This document provides a basic guide on how to import and manage your PAYD Pro Plus inventory with a Bookmark ecommerce site. For more in-depth inventory setup and management instructions, please refer to the **PAYD Pro Plus Online Help** tool (accessible from within PAYD Administration by clicking the icon).

Before you get started

Please confirm the following before you begin:

- It is recommended that you access PAYD Administration on a laptop or a PC with high-speed internet access in order to perform inventory management functions.

- Ensure that the product profiles for the products you will be selling online are accurate and complete, and that your inventory counts are as up-to-date as possible within PAYD Administration. Completeness in product profiles ensures that the data you export and import into Bookmark is usable. Remember that these product profiles will ultimately go onto your website and be visible to customers. In particular, ensure the following items in the product profiles have been entered, because these are the items that will be imported into Bookmark:

    - product name and description
    - retail price
    - quantity in-stock (on-hand)
    - brand name
    - supplier UPC (also called SKU)
    - status set to **Active**
    - category code

Note: *The Category Code that gets exported is a code generated by PAYD Pro Plus when the category is created, therefore it will appear as a string of numbers and letters. If you wish the category codes to be more descriptive and less cryptic than an alphanumeric string, you can rename your codes.*

Complete instructions for proper product setup, and how to edit existing product and category profiles, can be found in the **PAYD Pro Plus Online Help** tool. In the Product search results screen in PAYD Administration, click the help icon to access the online help.

Exporting the PAYD Pro Plus inventory file

Follow these steps to create an export file for your PAYD Pro Plus inventory.

1. On the PAYD Administration main screen, click the **Inventory** menu, then click **Product list**.

2. On the Product search results screen, click the **Export** button (⬆) near the top of the screen.

   The Export screen appears.

3. Click the **Next** button at the top of the screen.

4. On the left side of the screen, under the **Fields that can be exported** heading, select the following items, and then click the right arrow button (>). The items will then appear in the **Order of fields in my file** box on the right.

   - Product ID
   - English name
   - English description
   - Retail price
   - In-stock
   - Brand name
   - Category code
   - Supplier UPC
   - Status
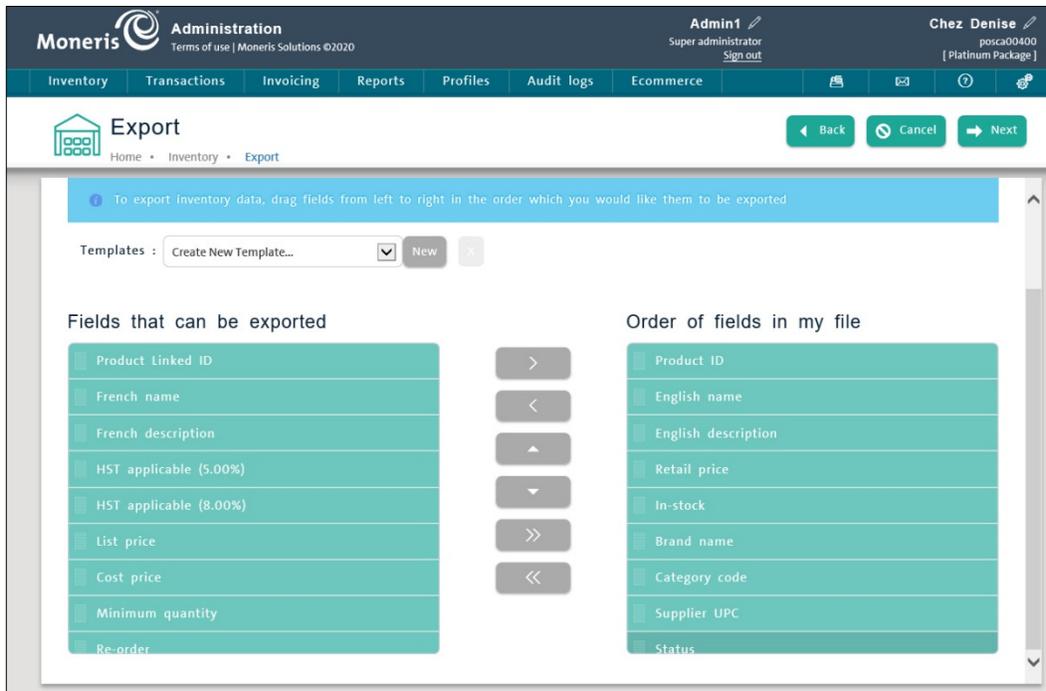
5. Once the items have been brought from left to right, they need to be re-ordered to align with the Bookmark import feature. Re-ordering is accomplished by clicking the item in the **Order of fields in my file** box on the

right, then clicking up/down buttons (⬆️⬇️) respectively until the item is in the correct position. The order needs to be as follows:

a. English name

b. Product ID

c. English description

d. Category code

e. Retail price

f. In-stock

g. Status

h. Supplier UPC

i. Brand name

Your end result should look like the example shown below:
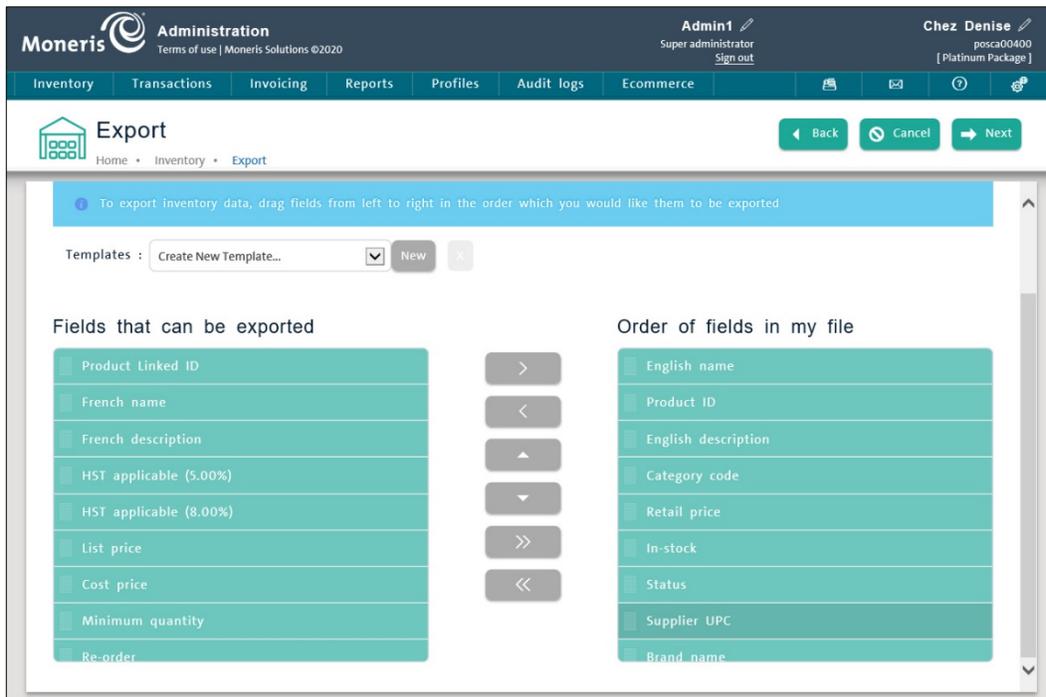
6. Save this export template in case you need to repeat this process in the future (because then you will be able to skip steps 4 and 5):

a. At the top of the screen, beside the **Templates:** drop-down menu, click the **New** button.

b. In the New template popup, enter a name for the template e.g. Bookmark.

c. Click the **Save** button at the bottom of the popup.

    You are returned to the Export screen.

7. Click the **Next** button at the top of the Export screen.

8. The next screen that appears provides a preview of what the exported inventory file will look like. Click the **Next** button.

9. In the download screen, click the **CSV** button.

10. Choose to save the export file onto your computer's local hard drive.

11. Click the **Done** button in the top right corner of the Export screen.

   The Product search results screen appears.

The export is complete, and the exported inventory file is now ready to be imported into Bookmark.

Importing inventory files into Bookmark

The exported PAYD Pro Plus inventory file can be imported into Bookmark to populate your online store. This section will provide very basic steps to access the inventory import functionality. For more in-depth instructions, please refer to Bookmark's end user documentation, or contact their support team for assistance importing the inventory file.

Important: Please remember that not every PAYD Pro Plus inventory field aligns with the Bookmark product fields. When importing product data, be sure to only check the Import columns in Bookmark that are present in the export file from PAYD Pro Plus to avoid errors.

1. Sign in to your Bookmark account.

2. Click **YOUR WEBSITE**.

3. Click the **Edit** button.

    This will launch the website builder tool.

4. On the left side of the screen, click **SETTINGS**.

5. On the SETTINGS menu, click **E-COMMERCE**.

6. On the button bar that appears to the right, click on the product tag icon (), then click on **Products**.

    This opens the Products page.

7. Click the **Import Products** button at the top of the page.

    This opens the Import Products page.

8. Ensure that you are operating on the **CSV** tab. The other tabs represent different file formats that PAYD Pro Plus does not produce.

9. Click the **Delimiter** drop-down menu and select **Comma**.

10. Ensure the **Skip First Line** checkbox remains checked.

11. In the **Import columns** section on the right side of the page, place checkmarks in the following boxes for the fields to import into Bookmark:

    - Name
    - SKU
    - Description
    - Category 1
    - Price
    - Quantity
   - Enabled
    - UPC
    - Brand
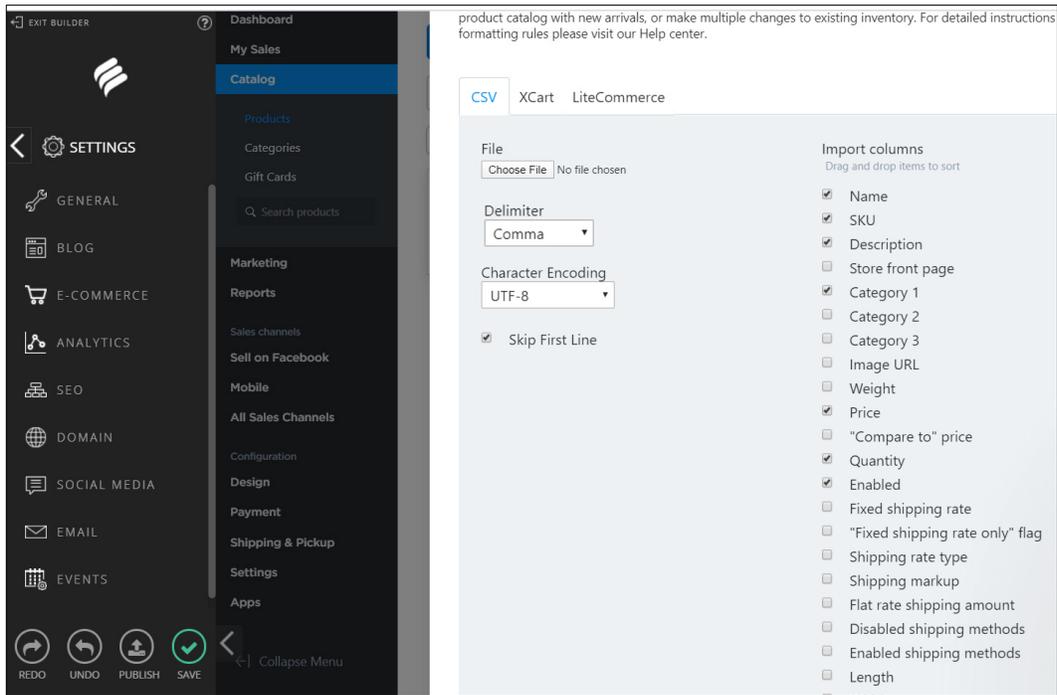
12. Proceed with the import. Refer to Bookmark's product documentation, or speak to their technical support team for further assistance.

Reconcile your inventory with PAYD Administration

We recommend that you reconcile your inventory levels in PAYD Administration frequently to reflect the quantities of products sold on your website. Follow these instructions to maintain correct stock levels within PAYD Administration, and to provide you with the ability to track the changes.

Note: *There are a few different methods to adjust your inventory stock levels within PAYD Administration. The method outlined here is the preferred method because it offers you advanced reporting on changes made to stock levels.*

1. Use Bookmark's ecommerce management tools to keep track of orders. Refer to their documentation suite or contact their technical support for assistance.

2. On your PC or laptop, log in to PAYD Administration.

3. On the PAYD Administration main screen, click the **Inventory** menu, then click **Product list**.

4. In the Product search results screen, search for the product that was sold:

   a. Click inside the search field near the top right corner of the screen.

   b. Search by:

      - **Product ID** (exact match)
      - **Product name** (all or part of the name)
      - **Supplier UPC** (exact match)

   c. Click the **Search** icon ( ). The search results appear below.
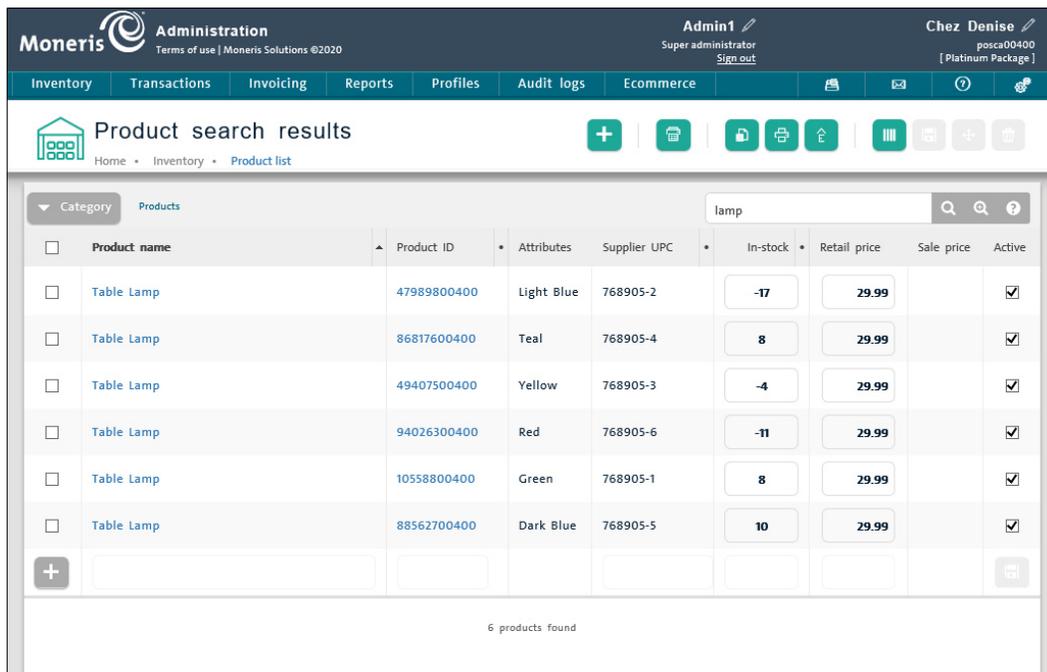
5. In the search results, click on the **Product ID** of the product you wish to edit.

   This opens up a popup with product details.

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6. In the product details popup, click the **Inventory** tab.

7. Click inside the **In-stock** field and make an adjustment to the quantity to reflect the sale quantity.

8. Click inside the **Note on manual adjustment** field, and enter some information about the sale, for example the date, reason, and customer who bought the item.
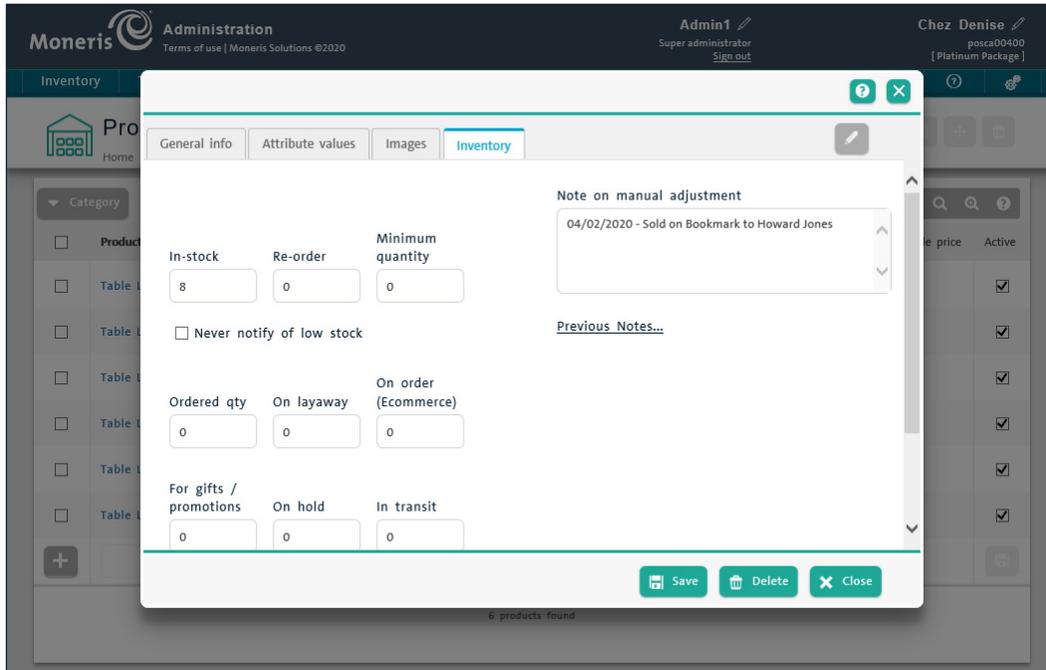

9. Click the **Save** button.

10. Repeat steps 4 – 9 as necessary to account for other products sold on the Bookmark ecommerce site.

Inventory change reporting

PAYD Pro Plus tracks changes to inventory items using the Product Change Log report. To access this report and track your product sales from Bookmark, follow the instructions below.

1. From the PAYD Administration main screen, click the **Audit logs** menu.

2. On the Audit logs menu, click **Products**. The Change logs – products screen appears.

3. Enter the date range for your report:

    a. Click inside the **Starting date** field and use the calendar to select a start date for the report.

    b. Click inside the **Ending date** field and use the calendar to select an end date for the report.
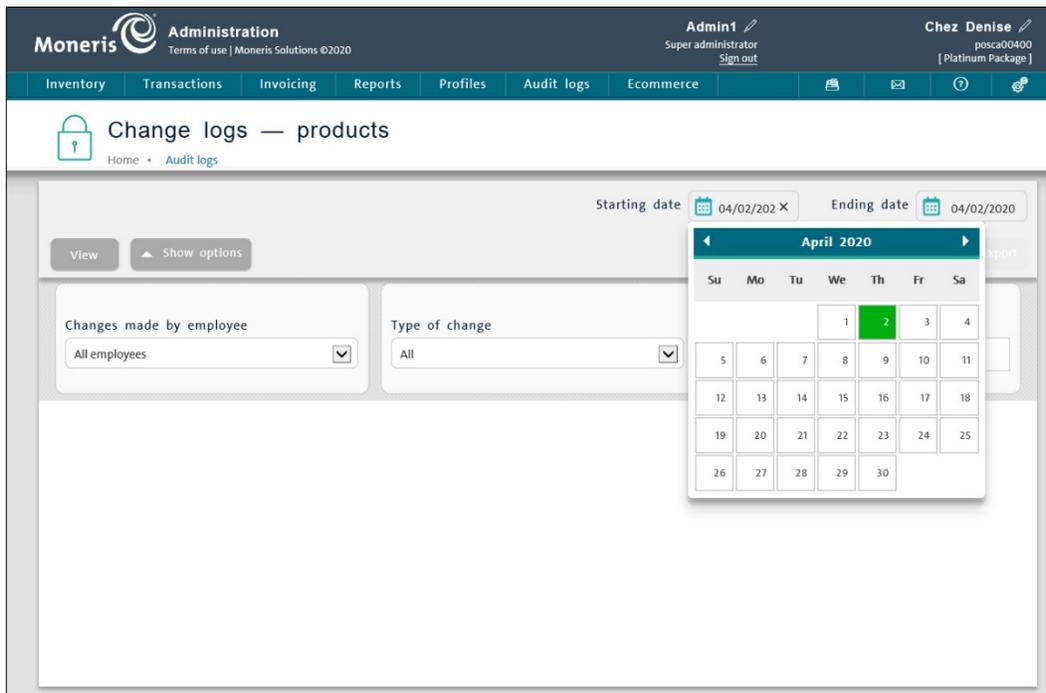
4. (Optional) Narrow your search results:

   ▪ To report on changes made by specific employees:

      a. Click the **All employees** drop down menu and select an employee's name from the list.

      b. Proceed to step 5.

   ▪ To report on the type of change made to a product profile:

      a. Click the **Type of change** drop-down menu and select an option. For this instance, select **In-stock**. This will only return results where changes to the In-stock quantities are made.

      b. Proceed to step 5.

   ▪ To report only on a specific product that was changed:

      a. Click inside the **Product that was changed** search field and enter the product ID for the item on which you want reporting, then press the **Enter** key on your keyboard.

      b. Proceed to step 5.

5. Click the **View** button.

   The report results based on your date and optional search criteria appear below.

6. Repeat steps 3 – 5 as needed for different dates, or with different report criteria.

For more information on the Product Change Log, including how to print or export the report results, click the icon on the screen to access context-sensitive help for this particular report.

Merchant support

At Moneris, help is always here for you 24/7.

If you need assistance with your payment processing solution, we're here to help, 24/7.

We're only one click away.

- Visit **Moneris Support** to:
  - download additional copies of this guide and other resources
- Visit **moneris.com/insights** for business and payment news, trends, customer success stories, and quarterly reports & insights
- For assistance with your Bookmark website, refer to the support resources at **bookmark.com/help_center**

Can't find what you are looking for?

Call Moneris Customer Care (available 24/7) toll-free at **1-866-319-7450**. We'll be happy to help.

You can also send us a secure message 24/7 by logging in to Merchant Direct® at **moneris.com/mymerchantdirect**.

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Your gift card processing is governed by your agreement for gift card services with Moneris Solutions Corporation. Your credit and/or debit card processing is governed by the terms and conditions of your agreement for PAYD credit/debit card processing services with Moneris Solutions Corporation. It is your responsibility to ensure that proper card processing procedures are followed at all times. Please refer to the *Moneris Merchant Operating Manual* (available at: **moneris.com/support**) and the terms and conditions of your applicable agreement(s) for credit/debit processing or other services with Moneris Solutions Corporation for details.

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