

Lightspeed Shuttle FAQ & Best Practices

Mission: The Shuttle program for Retail Orbit integrates multiple POS systems with Retail Orbit so that data can be collected without having to several reports from the POS and manually upload the information. Each POS system is different, however, and that means that shuttle has to adjust (as best it can) to be able to obtain the data successfully from the POS. The purpose of this document is to outline some common questions that come up during the integration process so that you can better understand how it works, what to expect, and what practices you need to put in place in order for Shuttle to receive the best data possible.

Which version of Shuttle should be installed for this POS?

N/A

Does this POS use a relational database? How does this affect Shuttle?

Yes. This means that when you make a change to an item (i.e., the department on the item), it automatically updates history in the POS with the changes you made. Therefore, if we repull the historical data, the changes will be reflected in Retail Orbit as well. NOTE: Support must be notified if items were changed and a history pull is required because of the departments changing on items. This shuttle cannot be accessed by the client and so the Management One support team must initiate any shuttle pulls.

How does the department mapping work for this POS?

When a Shuttle flight is run for this POS, any Lightspeed Categories that exist in Lightspeed but do not exist in the Retail Orbit mapping will show up as unmapped departments. If notified, Management One support can send an excel document that lists out all the Lightspeed Categories so that you can fill in the M1 class that it should feed data to. Just send support back the filled in Document and we will update the mapping and pull data.

Are there any character limitations that we need to be concerned with for Shuttle to work?

We highly recommend that Class Codes should be limited to Letters and Numbers with a length not exceeding 10 characters. Shuttle currently has the following limitations:

-Maximum Number of Characters: 20 (Please note that reporting can be thrown off if the combination of class code, class name, location name and category are too long).

-Characters Accepted: A-Z, 0-9, &, /, \$, +, -, #, <, >, ?

-Characters NOT Accepted: |, %, ' , ` , (comma)

Is Shuttle able to collect 24months of historical data, and if so, how is the historical inventory populated?

Yes, history can be obtained for 24months, however, Inventory and On Order values are not available during this process. To get the historic inventory values, we will need to run shuttle for the current month, and then calculate the historic inventory based on the transactions obtained during the history pull.

What options are available for collection of Markdown data?

POS markdowns are available for this Shuttle. We do collect inventory data directly so any permanent markdowns will be reflected in the inventory value, it just will not show up as a markdown.

What dates are used when determining where to collect the Purchase Order data?

The Expected date must be filled in, in order for us to read the On Order. This is how it determines what month to put the On Order into.

How far back do we collect data on Open Purchase Orders?

The Lightspeed Shuttle looks at Open Purchase orders from 60 days in the past. The POS should be maintained so that any Orders that are more than 60 days old, but ARE still expected to come in should have their Expected Date adjusted accordingly.

What stops shuttle from working properly with this POS?

This shuttle runs automatically every night, and should work without issue, unless the user is removed, or the permissions for the user are changed.

Are there any other nuances with Shuttle that I need to be aware of for this POS?

The biggest nuance with Lightspeed is that both the On Order and the receiving come from the Purchase Orders in Lightspeed. We are not able to retrieve receiving data in any other way. This causes some confusion and thus clarity is needed on proper receiving practices. There are a number of Lightspeed articles that explain this in great detail, however, here is a summary of some common practices that should be adhered to in Lightspeed (in order to get the best data possible):

- All receiving of goods must be done via a purchase order.
- The received date on finished purchase orders is how we allocate receiving. This date must be accurate and should not be edited once assigned.
- All inventory items must be assigned a category. If items don't have a category, they will not be read within Retail ORBIT.
- Manual adjustments made to inventory cannot be read and will show as an inventory variance. A manual adjustment is when you change the quantity of an item directly in inventory.
- Automated adjustments made to inventory, during the sale of an item that is not in stock, cannot be retrieved and will show as an inventory variance.
- If an item on a purchase order is partially received, and if the completion of the receiving will span another month, you need to create a new purchase order to receive the remaining quantities of that item. You can close the original PO if this item was the only one remaining.
- All items in inventory should have a retail price and a cost.
- The user designated to generate our authorization key must be an administrator, and should never be deleted. For this reason, we suggest that you create a specific user for ORBIT Shuttle during the initial installation.
- Lightspeed Retail does not support the export of any data for permanent markdowns.
- All purchase orders should have a valid Expected Date. This is the date when you expect goods to arrive.
- Any changes to categories should be coordinated with the affiliate. This will help eliminate issues where goods are assigned to a category that is not linked within Retail ORBIT.
- Sales must be entered for the current date or they will not be read by the shuttle pull. If you have Web Orders for a previous day that you are inputting/importing into Lightspeed, you must use the current date for those transactions.

One final note that Lightspeed users/clients should be aware of how Retail Orbit collects data from Lightspeed. Most other Retail Orbit Shuttle extractions are a full MTD data pull every night. So if any changes or corrections for a given record dated a few days ago occurs (within the current month), the next nightly pull will capture the correction due to the MTD pull. However, Lightspeed Series R sends their data at the SKU level, which unfortunately is a very large amount of data. To accommodate this restriction from Lightspeed, our Shuttle only pulls the current day's records (+ inventory levels). The reason this is important to be aware of, is some

clients use 3rd party platforms (ex. Amazon and others) to make online sales and those sales are not inserted/posted in Lightspeed until a day or two later, which our integration would not capture. For example, on Jan 15th, an online 3rd party sale was made at 8 pm. The Retail Orbit Shuttle data pull occurs at midnight for all of Jan 15th's transactions (but the 3rd party sale has yet to be posted). The 3rd party platform then posts the Jan 15th (8pm) sale into lightspeed on Jan 17th (some 3rd party platforms take 1-5 days to post). Retail Orbit sales would be less than what is reported in Lightspeed due to those missed sales because on Jan 17th, the nightly pull will be grabbing data dated between the last pull (Jan 16 at 11:59pm) and Jan 17th, 11:59pm. This can be easily solved by requesting a data refresh for a specific month from the support team (support@retailorbit.com). Ideally, the month will have been completed and all 3rd party transactions are posted in Lightspeed, prior to the request.

If there is an issue, where do I get support?

The best place to start with support regarding the collection of data is to contact Retail Orbit support by email at support@retailorbit.com, by phone at 520-612-2001 or by appointment at retailorbit.setmore.com