**Plan for go-live process of the Global Shop and Woo Commerce**

**Website integration for Paragon:**

In order to successfully transition from a testing environment to a fully robust version of the project on the live environment, we need to ensure that the scripts are thoroughly tested in intended. Once we are moving into live system there will be additional one time processes that need to run on the live environment.

To reiterate the Testing Process, I have listed an outline of how the project works below. When testing, it is important that the scripts are tested in the order mentioned, since the testing project requires manual execution of the scripts.

# Testing instructions:

The project has been set up in custom menu items for testing purposes. The flow of the test should be: first inventory upload into the website, then customer import into Global Shop, then order import into Global Shop.

# Inventory upload to Woo Commerce.

Inventory from Global Shop will be uploaded to the woo commerce website if it is flagged as an online part and has categories associated with it.

## Inventory set up on Global Shop to make it an online part:

The User 1 defined textbox in the inventory master is now labeled Website Part. Write a YES on this textbox to flag any inventory part as a website part. Once this is set, accessing the Inv Extra UF (originally the Script 3 button) will provide with additional fields for the website information. Fill in the Part Number, online part name, part description, and assign categories and images in order for the part to be created or updated on the website.

## Category maintenance:

Parts that are flagged as inventory parts **must** be linked to at least one category. These categories can be managed in the Category Maintenance under Inventory > Administration > Category Maint (5289). From here you can create and delete categories. This script uses the REST API to create categories on the website whenever you save the categories on the screen. The categories and their parent to child relationships created here will be accessible in the category drop downs on the Inventory Web information from Inventory Master.

## Images:

Images are expected to be uploaded by the user to a specific directory on the website. This directory was created specifically for images that will be used for inventory items on the website. The Inventory Web information has a grid and browser for the user to associate these images to the inventory parts. The browser button will grab the name of all the images in that directory and the user will have to select what image names will be linked to the inventory part selected.

## Uploading Inventory Parts to the website:

The script that uploads inventory parts to the webstie will be running off the Online Update, and thus these parts will be created automatically anytime Online Update runs and detects that any part was modified or added. For the time being, this script is set up in Inventory > Administration > Manual Inv Upload to Website (5289) to be tested. Any time a tester would like to see if an inventory part is uploaded correctly, the user can click on this menu item and run the upload manually. The user can then verify that the part was created on the Wordpress dashboard under All Products.

# Customer creation in Global Shop from Website.

Customers will be created on the website and will automatically be uploaded into Global Shop.

The script that runs the customer creation in Global Shop will be attached to the Online Update and will run at Paragon’s desired interval. For now I have created a custom menu item in Customer Relationship Management > Administration > Manual Customer Test (5289) that will run the script and create customers in Global Shop from the website.

Any time the script runs, it will pull all customers that exist on the website and match them up against customers in Global Shop. If it finds a customer in the Website that has not been created in Global Shop, it will create it with the information it gathers from the website. It is important to note that for a customer to be created in Global Shop, we are required to have a billing address, therefore **customers from the website will only be created in Global Shop if they have a billing address saved on to their account in Wordpress**.

# Order Creation in Global Shop from Website.

Orders that are placed in the website will be automatically created in Global Shop in the same manner that customers are created.

The script that will create orders in Global Shop will be attached to the online update hook as well. There is a custom menu item in Order Entry > Administration > Order Upload from Web Test (5289) that will manually run the script so that we can verify that orders are being created.

This script will pull all order information from the website and match any order with existing orders in Global Shop. If it finds that a new order was created, it will create the order in Global Shop. **It is most important that everything up to this point has been created properly**, since in order for a customer to place an order on the website, the inventory needs to have been created correctly from Global Shop, and in order for the order to be picked up by Global Shop, the customer needs to be created correctly from Global Shop.

# Go-Live process

The installation of the project for the live company will be a little more intensive than regular installations due to the existing data in Global Shop that will need to be created in the website and associated with the information in Global Shop. This will most likely only apply to customers.

# Installation in Global Shop:

The installation process will consist of creating the tables in the live system and setting up all of the scripts. There are currently 8 pervasive tables and 5 scripts. Three of these scripts will be set up on the Online Update to be run automatically, as well as have custom menu items in case they ever need to be run manually.

# Website setup:

In order for the script to successfully interact with the WooCommerce website, we need to make sure the Plugin that allows basic security has been downloaded and activated. We will need to create a username and password with administrative rights that the script will use to request and send information through the API. Once the connection has been established and tested, we need to worry about the data migration.

All of the customers currently created in the live system in Global Shop will need to be created on the website BEFORE the script begins creating customers in Global Shop automatically. Once these created, we will need to run a one-time script that will match the customers on the website to the customers already created in Global Shop. We need to determine a set of rules on how it is that we will be matching Customers from the website to the existing ones in GS. We are doing this to avoid creating duplicate customers in Global Shop. We need to discuss how the team is going to handle existing customer set up once that association is completed. The customers will need to be given their account information for them to be able to log in to the website and be able to create orders.

All inventory in Global Shop will need to be flagged and set up as inventory part as it has for the testing phase. While tedious, this should be a seamless process, since the script will be running automatically in the background and will take care of setting up the inventory on the website.