
COMMERCE TOOLS PUNCHOUT SELLER IMPLEMENTATION GUIDE

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ABSTRACT

This guide is designed to explain the Four51 cXML Punchout/OCI Round-trip functionality at a high level, along with details and issues unique to the Four51 Seller.

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INTRODUCTION

Punchout is Ariba's name for its cXML-based round-trip order process, although it is now synonymous with any round-trip order process. SAP OCI, or Open Catalog Interface, follows a similar work flow although the technical implementation is slightly different. In this document, **Punchout** will refer to both cXML-based and OCI-based round-trip processes.

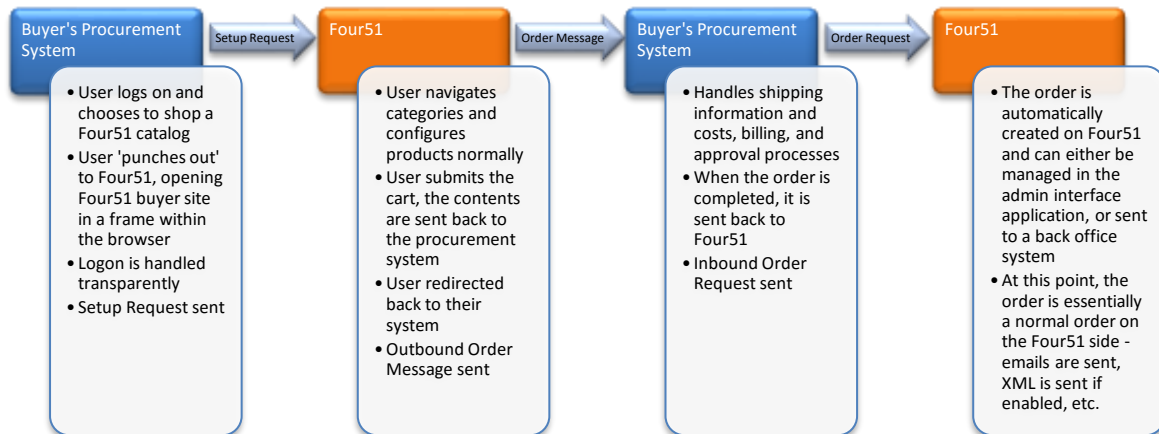
Four51 has successfully completed over 100 Punchout implementations, with over 1/3rd of them being with Ariba.

There typically is not a way to sell Punchouts to your customers. Most of the time your customers will approach you, asking if you can implement a Punchout for them.

One common issue is pricing. The price that Four51 quotes is not a technology use fee for Ariba, SAP, or any other procurement platform. The one-time component is a project fee, and the monthly component is for support and maintenance. Four51 has invested heavily in a flexible and powerful Punchout integration, and the value that it provides goes beyond what a simple CIF catalog can provide. Customized, branded buyer experiences along with variable product creation are two of the highlights of this value-added service. Four51's relationship is with the seller, not the buyer, so details of the pricing arrangement beyond what is charged to the seller are outside the scope of Four51's involvement.

OVERVIEW

At a high level, the inbound Punchout flow looks like:



A typical Punchout project timeline looks like:

Step	Week
Seller and their Buyer agree to implement Punchout	1
Seller contacts Four51 to begin implementation	1
Kick-off call between all three parties to discuss the project at a high level	2
Four51 Buyer site is constructed and a template user is created	2
Buyer completes the setup form and returns to Four51	2
Four51 configures the test environment and provides testing URLs	2
Seller configures products, categories, groups, etc.	3-7
Buyer tests connection and event sequence	3-7
Once testing is complete, Four51 provides production URLs and Buyer goes live	8

DETAILED SPECIFICATIONS

FOUR51 BUYER EXPERIENCE DIFFERENCES

The Four51 Buyer experience is slightly different in comparison to a non-Punchout ordering process:

- The logon process is streamlined and is transparent to the end user
- Users can either be completely anonymous, pre-profiled, or profiled on the fly
- Four51 is usually run inside of a frame in the browser window
- The Four51 'Logout' button will not appear, since this is handled in the procurement system
- The Four51 experience stops on the View Cart page when the 'Submit' button is clicked – shipping, billing, approval, tax, payment, and order submission steps are all handled on the customer's procurement system

UNSUPPORTED FOUR51 FEATURES IN A PUNCHOUT

If any of these pieces of functionality are essential to business processes, the Seller will need to analyze and address them ahead of time. It is recommended to do a pre-implementation survey of the Buyer site, and check off boxes for items that do not appear to be relevant:

[] **Variable specs for static products** - Most procurement platforms don't have a concept of a custom spec at the line item level, one workaround is to create a variable product with variant-level specs that doesn't render artwork.

[] **Variable 'Add item to cart' (line item-level) specs for variable products** - See above.

[] **USAData list services** – This service requires line item-level specs, see above.

[] **Custom order fields, cost centers, comments, coupons, gift cards, and date needed** - All handled by the procurement platform, so there is not a way (or a need) for Four51 to collect and send these back.

[] **Reserved inventory** – Inventory is only dinged once, when the order is submitted on Four51. Reserved inventory is not able to be captured, as Four51 has no way of knowing when carts are abandoned or canceled once they are on the procurement system.

[] **Four51 Buyer Superuser permission**

[] **Kits**

SUPPORTED PUNCHOUT FEATURES

- cXML-based round-trips
- Base-64 or URL encoding of the outbound order message
- Custom mapping of incoming and outgoing transactions
- Create, Edit, and Inspect sessions
- UNSPSC commodity codes
- Punchout Index Catalog (Punchout directly to a product or category)
- Individual buyer user order history on Four51
- Credit card payment method
- Assign user to group(s)

UNSUPPORTED PUNCHOUT FEATURES

- Setup Request source sessions
- Change orders
- Persistent shopping carts

- Purchase order processing, invoicing, ship notices, and other transactions
- EDI, or anything besides XML-based (cXML) receipt of purchase orders

FOUR51 ADMINISTRATION

There are several ways Punchout users can be setup on Four51. Whether these options are available is dependent on unique profile information being passed in the Setup Request and the inbound order. This is usually in the form of the user's email address:

- **Non-profiled** – when no unique profile information is sent in the Setup Request or inbound order, or when order history, assignments, and email notifications aren't needed. All Punchout users are temporary users created on the fly, based on the template user, and will all see the same categories and products. All orders submitted will appear as though they were placed by the template user.
- **Pre-profiled** – Some or all users are setup ahead of time when having unique category/product assignments is required. Profile information must be passed in the Setup Request.
- **Auto-profiled** – Users are created on the fly, based on uniquely identifying information passed in the Setup Request. Profile information must be passed in the Setup Request.
- **Full-profiled** – Not only are users profiled so they see categories/products unique to them, they also have profile information sent in the inbound order allowing order history to be displayed and email notifications to be sent. Profile information must be sent in the inbound order.

All Punchout implementations require a template Punchout user. This user will be the basis for any non-profiled Punchout users, or any Punchout users created on the fly. This user should only have product/category/group/etc. assignments that all Punchout users will have access to.

If the Buyer site will have both Punchout and non-Punchout users, it is recommended to create a 'Punchout User' group. You would then assign the 'Punchout User' permission at the very least to this group. Punchout-only products and categories can also be assigned to this group.

The 'Punchout User' permission is required to be assigned at the company (not recommended), group, or user level for all Punchout users. Once this permission is assigned, the user cannot logon through the logon page like a non-Punchout user. This can make testing and support troublesome. Using the Four51 test environment, you can temporarily unassign the 'Punchout User' permission and log on as that user by using the 'Logon' link in the Seller interface to do any testing/troubleshooting with that user.

Users can be assigned to groups to provide for further flexibility of user permissions/settings. In the past, this was not possible, so users were pre-profiled and assigned to groups. With this feature, you can have the users assigned automatically to a group(s) when they first punchout and the punchout user is created. It also supports updates to the user/group assignments and if the group doesn't exist it will create it on the fly. Syncing user-group assignments is possible as well, so the system would remove all group assignments and then assign the group(s) in the XML.

PUNCHOUT USERNAMES

A Punchout user's Four51 username will usually be the email address that is sent in the Punchout. There are certain scenarios where this email address might already be in use under a different buyer company on Four51. This is why it is recommended to have a unique string appended to the email address when creating a username for users created through a Punchout. This ensures that the Punchout usernames will not conflict with any other usernames on the Four51 system, as Four51 is a shared platform and usernames must be unique. We strongly recommend configuring the Punchout mapping to append the Four51 database ID to the email address for user creation, like:

john.doe@company.com-30180

Four51 will configure the mapping this way by default, unless specifically asked to change it.

Remember that any users created ahead of time, either manually or through automated upload, will also need to follow this schema.

TROUBLESHOOTING AND SUPPORT

SELLER SUPPORT

Questions can be submitted to Four51 by submitting a case in the Four51 Customer Resource Center. This can be accessed through the knowledgebase as follows:

- Logon to your admin interface on Four51 (<http://www.four51.com/ui/logon.aspx>)
- Select 'Help' in the upper right corner
- Click on 'Find Answers'

Please check the knowledge base first, as your question may have already been posted there. If you need additional help, the please select one of the following links:

- Click on the 'Submit A Case Here' link in the lower right-hand side of the panel; or
- Click on 'Click Here To Submit A Case' on the home page of the knowledgebase

REFERENCES

- **Four51 cXML Punchout Implementation Guide** – available on the Four51 Knowledge Base
- **Four51 OCI Round-trip Implementation Guide** – available on the Four51 Knowledge Base
- **cXML 1.2.021 Documentation** – available at www.cxml.org