Shopify *made easy*

Your shopify sync with Salesforce made easy

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Preface - An Introduction to the App

Shopify Made Easy is a Shopify Salesforce Connector for a plain-sailing synchronization experience.

Shopify Made Easy is a HIC Global Solutions Product. The app acts as a connector to import legacy data and synchronize all updates to it thereon in real-time.

We brought together the best features of Lightning and Classic with Shopify - the most popular work order and inventory app - so you can generate and manage Products, Variants, Location, Inventory, Collections, Orders, Draft Orders, and Order Fulfillment, all from a single app.

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1. Features

Shopify Made Easy allows you to get your products to the market and sell faster with features such as:

- Legacy Data Imports To Consolidate Salesforce Platform Data.
- An Eloquent, Lucid User Interface.
- Real-time Synchronization of Records.
- Concurrent and Efficient Inventory Management.
- A Single, Comprehensive App to Manage all eCommerce objects.
- Breezy, No-code installation, and Dynamic Field Mapping for non-IT users.

2.System Requirements

The app requires that you have Salesforce AppExchange installed on your system to be operational.

Other Prerequisites

1. Salesforce account: You may visit www.salesforce.com for account creation if you don't have an account or Log in to your existing account.

2. Shopify store account: New users should log in to www.shopify.com to locate their business store and proceed as per the instructions given in the further sections of the manual.

3.Installation

In subsequent sections of the handbook, we give you a walkthrough of all the installation steps.
Be sure to follow along with them in sequence for a breezy, error-free install experience.

3.1. Installation Setup At the Salesforce Platform

We shall begin the Installation process by logging into Salesforce.com where the app is downloaded and configured for functionality.

3.1.2 Finding *Shopify Made Easy* on AppExchange

Visit Salesforce Appexchange (https://appexchange.salesforce.com) and type for Shopify Made Easy in the search bar.
Select Shopify Made Easy and click on *Get It Now* to install the app.

Please note that to install Shopify Made Easy app, you should Log in to Trailblazer.me using Salesforce account credentials.
See the below figures for reference.

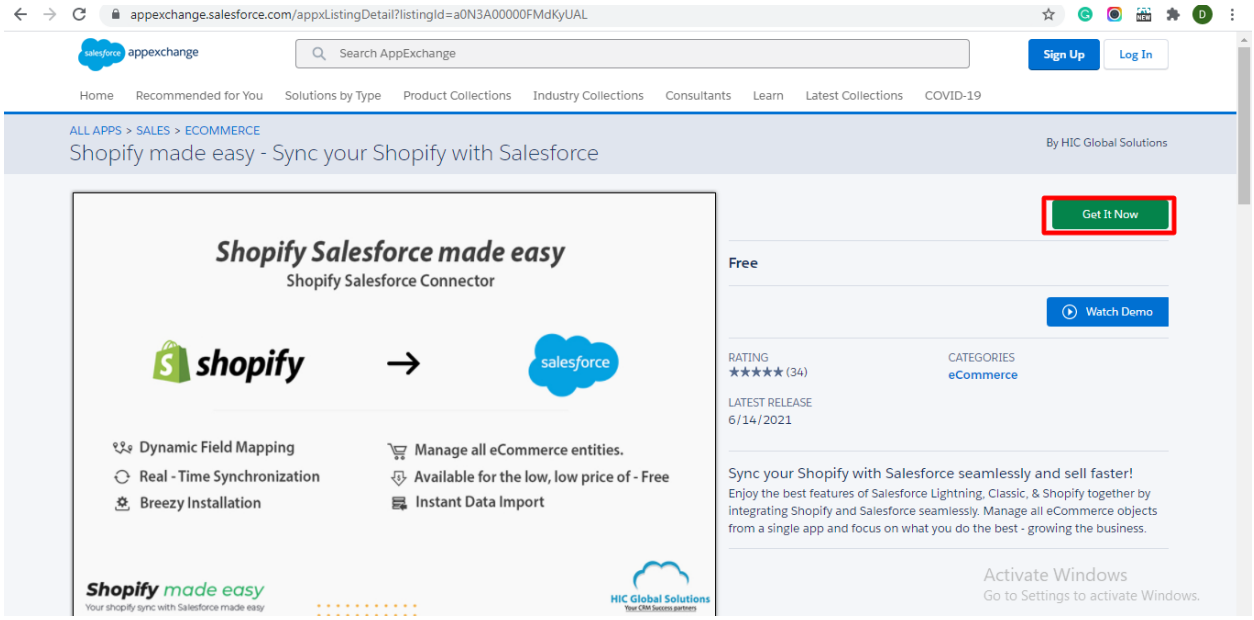


Figure 01

Log into Trailblazer.me with your Salesforce username and password.

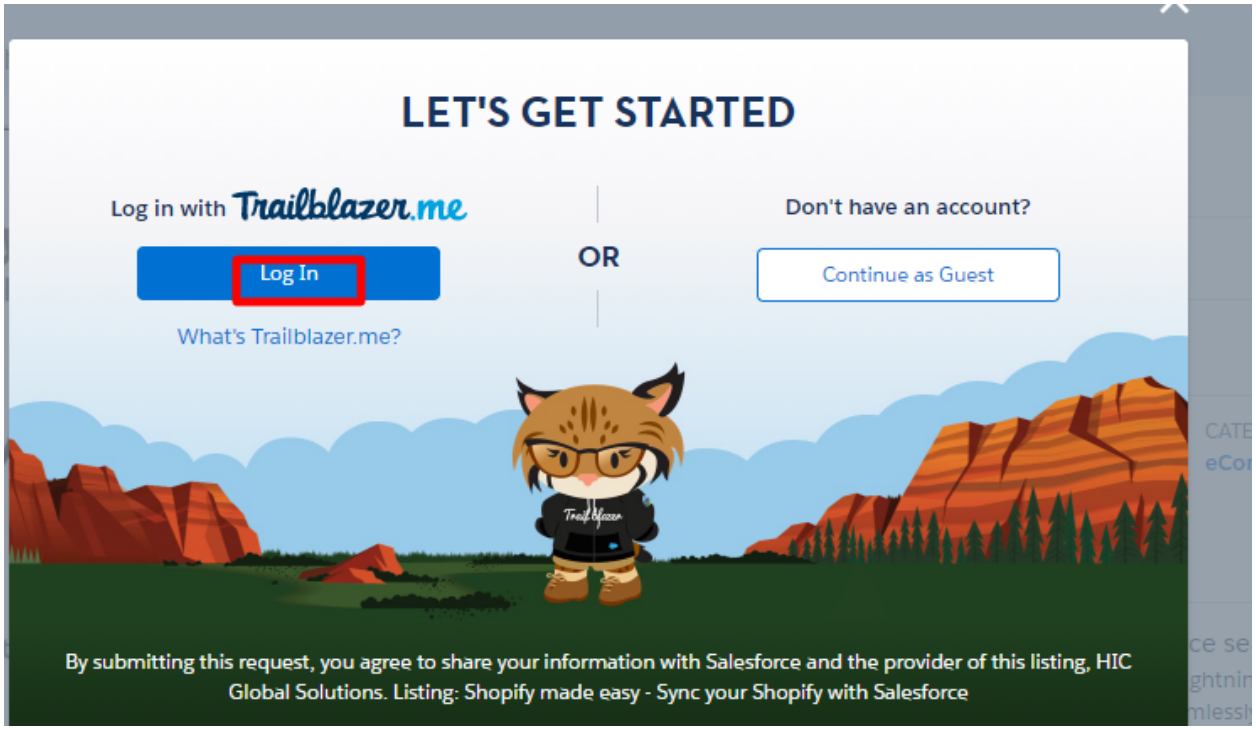


Figure 02

After logging in, You will be asked where to install the package. Select "Install In Production." as shown in Figure 02.

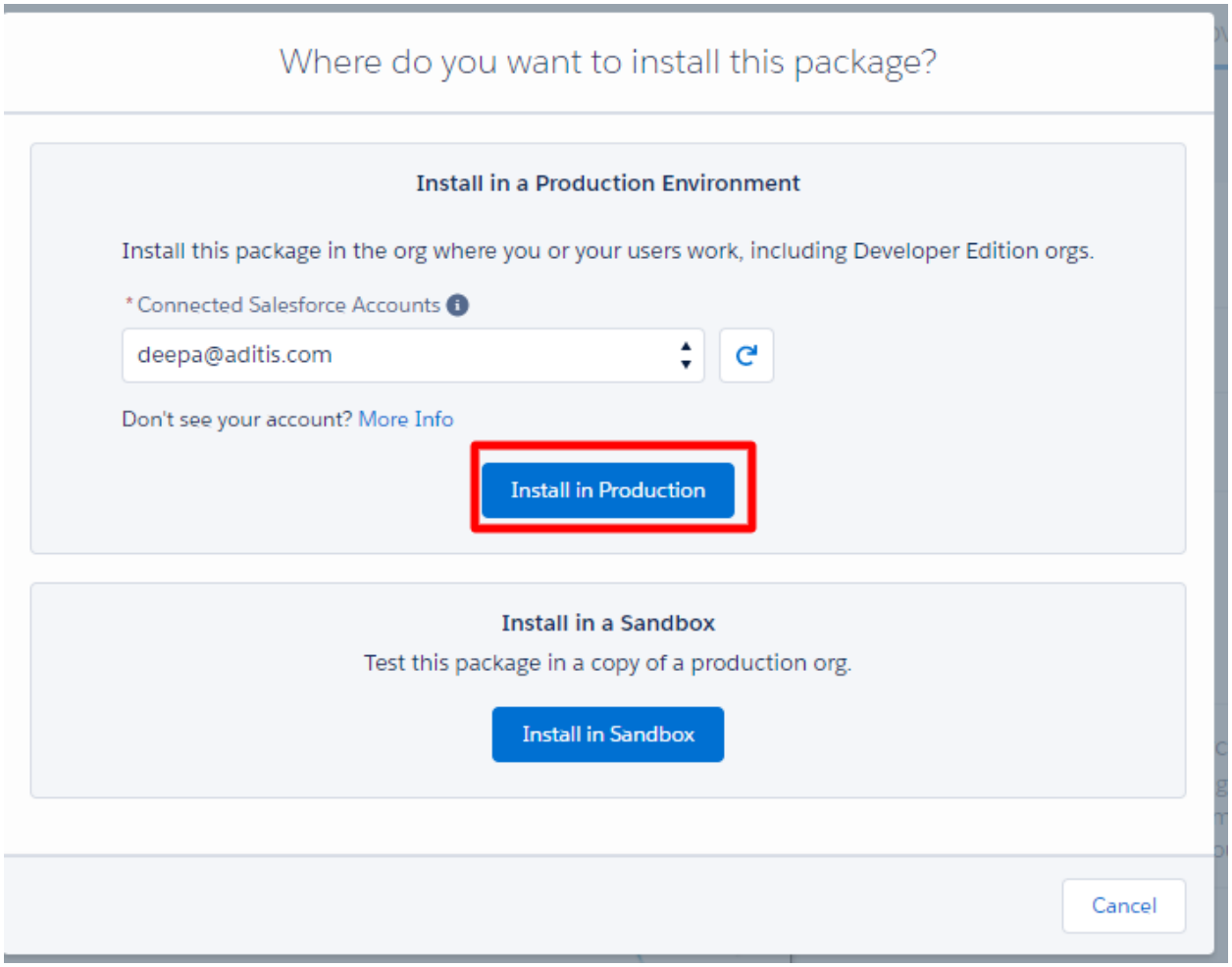


Figure 03

You should be now on the web page to confirm installation details.
Check the box that needs you to agree to the term and conditions.
Then, Click on ‘Confirm and Install” as seen in figure 04

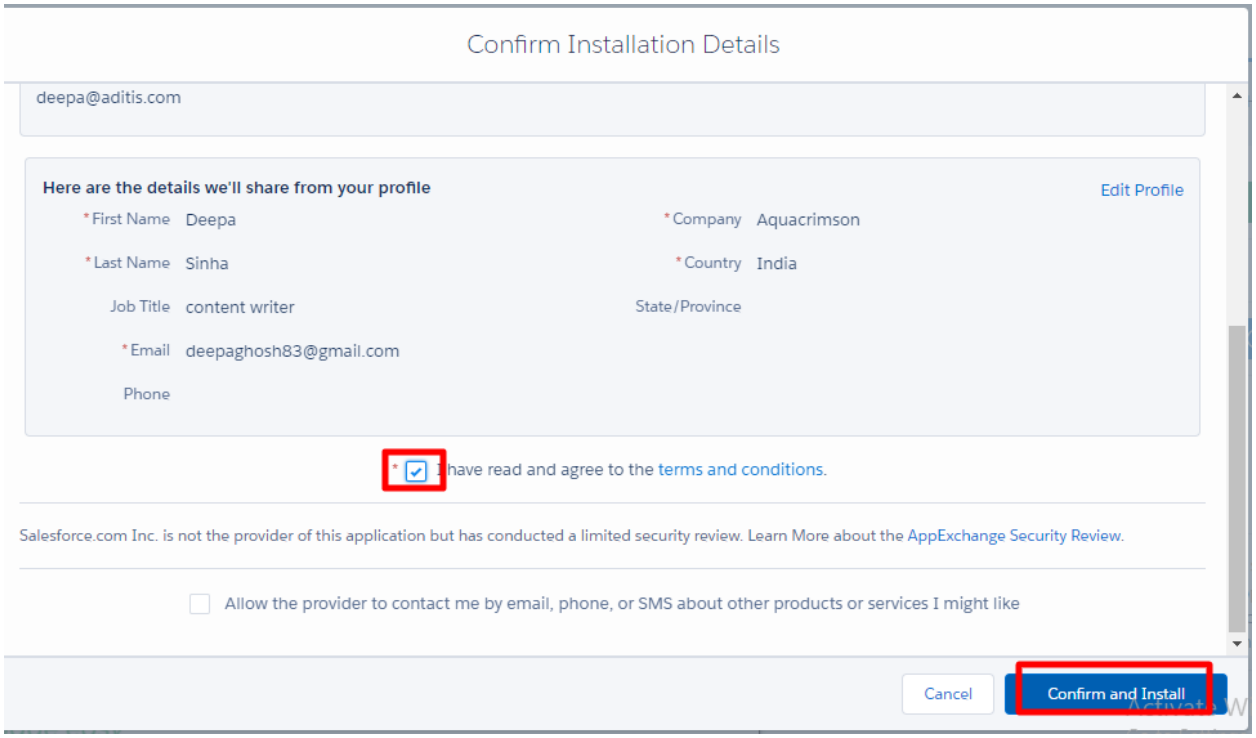
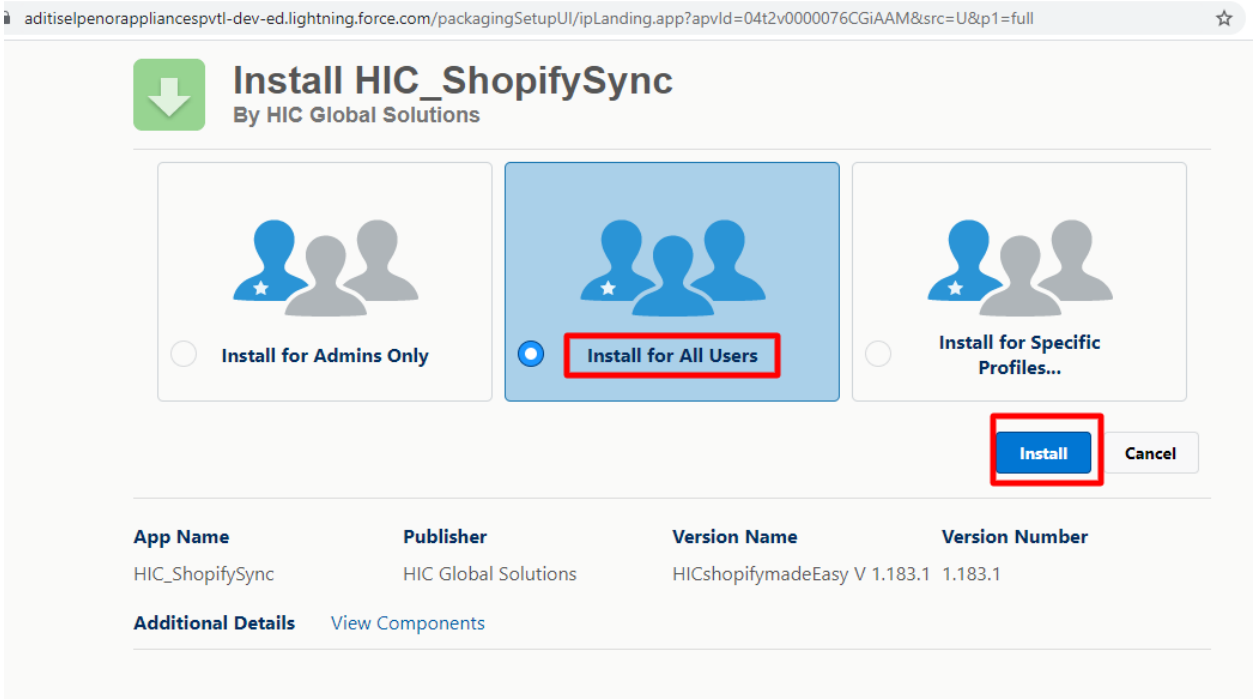


Figure 04

Here, Install for All Users is chosen by default, Click on 'Install' to complete the installation process.



The installation screen should now read “Installing and granting access”.

This process takes time and you will be notified when the installation is over.

After the package is installed, you will be able to view the package on your Salesforce Set Up page as shown in figure 05

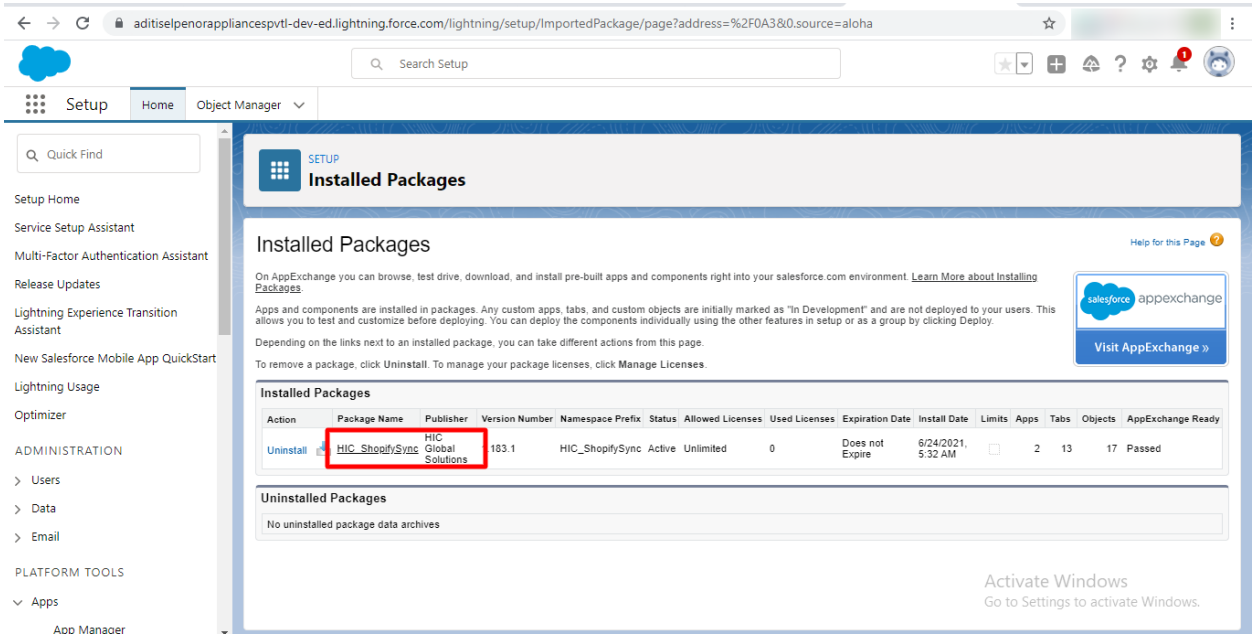


Figure 05

4. Prerequisite Salesforce Configurations

Here onwards, you’ll need to configure the installation from the Salesforce Org to make it work.

We will configure the installations in 6 steps.
From the same page, Go to App launcher | Type HIC Shopify Made Easy in the search bar| Click on HiC Shopify Made Easy. See Figure 07 for reference.

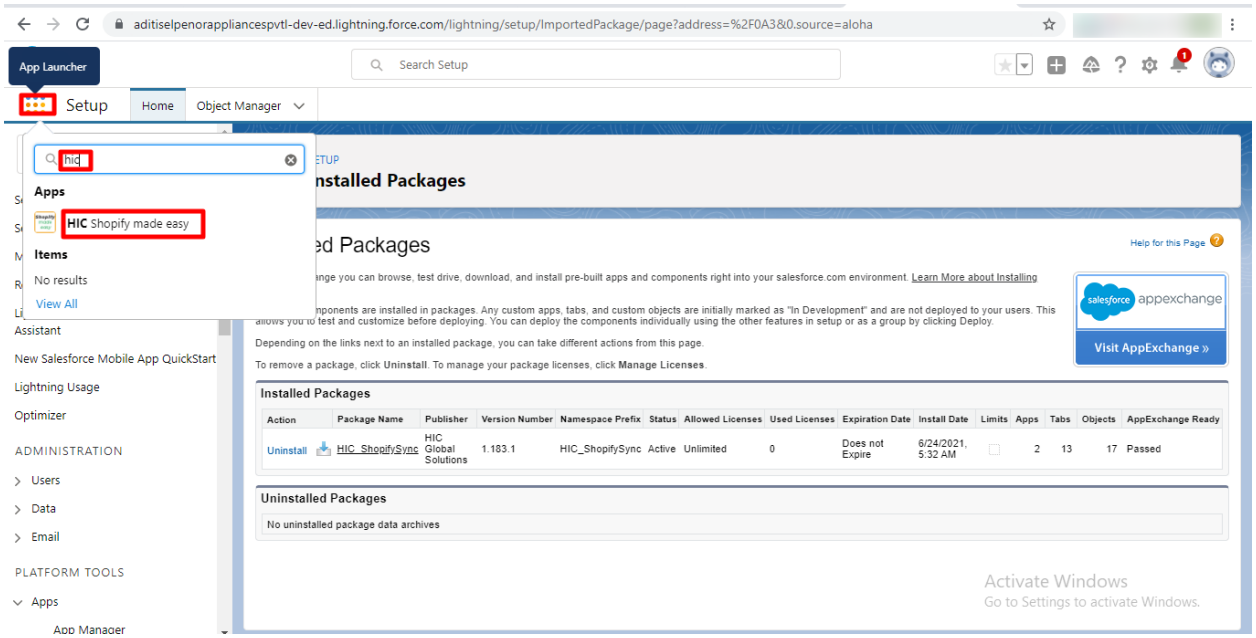


Figure 07

Next, Go to Salesforce Shopify Sync Settings as seen in figure 08

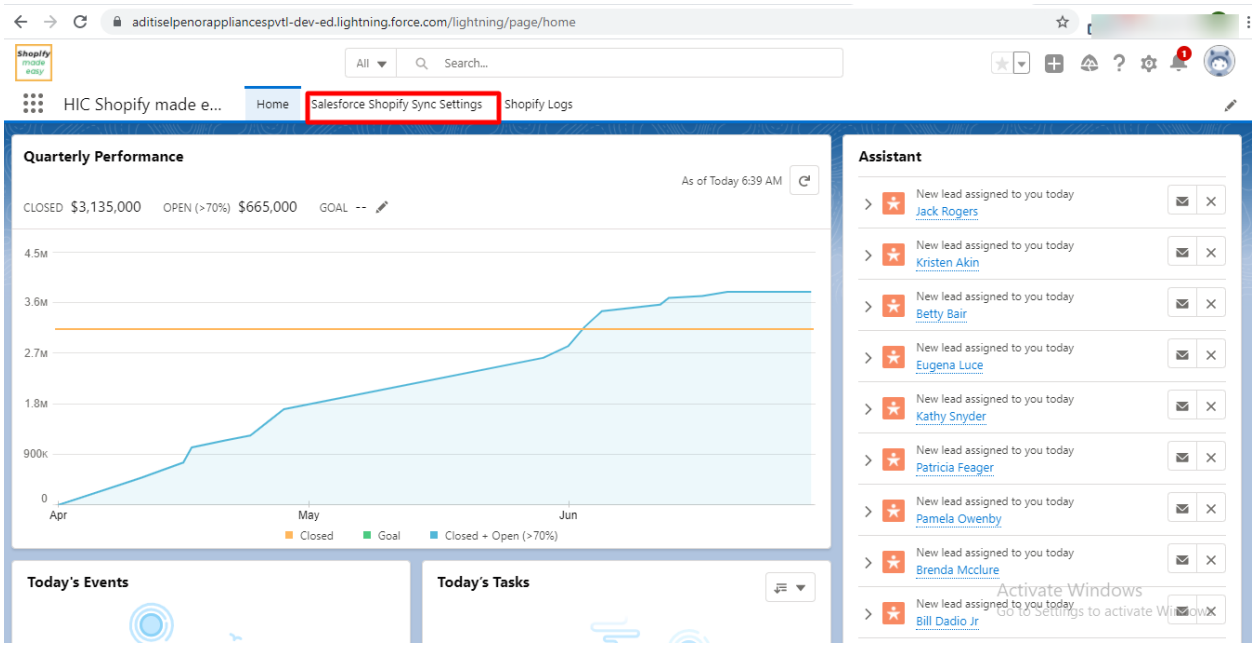


Figure 08

This brings you to Step 1 of the configuration process.

In Step 1, we will register your site, create a remote site setting and generate a self-signed certificate as displayed in Figure 09

Step 1

4.1. Creating A *Site* URL for your *Org*

We will begin by creating a new site.
Go to Step 1, and select ‘Click here” to create or activate your site. reference figure 09

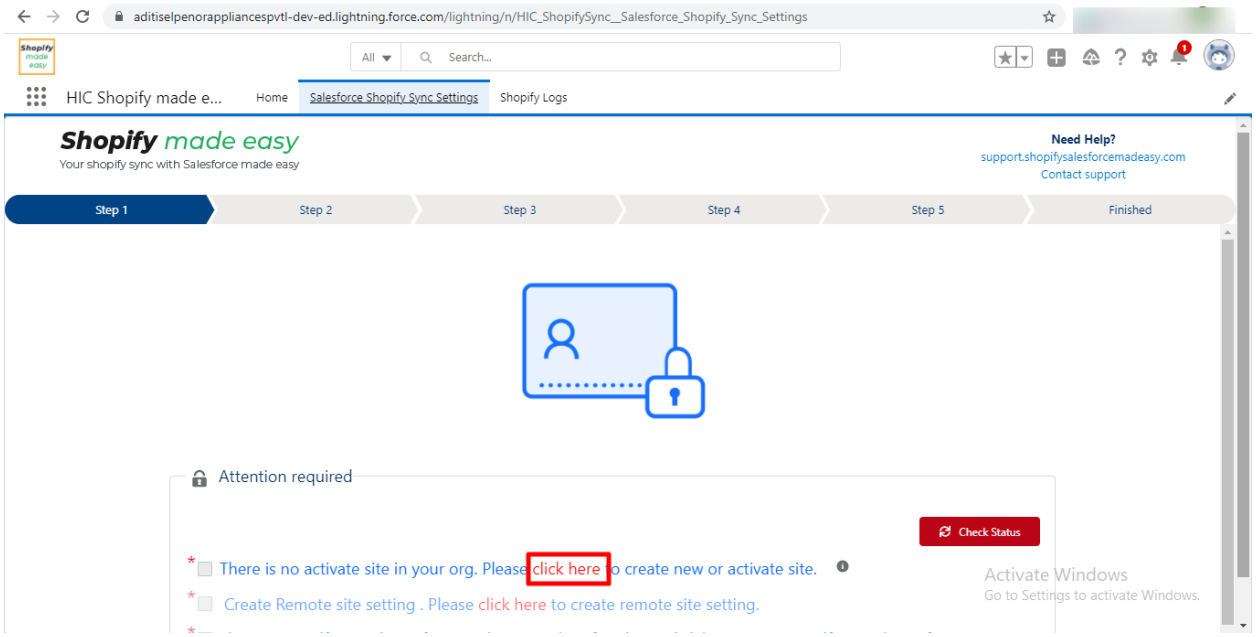


Figure 09

This will take you to a webpage as shown in Figure 10.

Here, enter in a unique Domain Name for your Salesforce Site. Use the Check Availability button to validate uniqueness.

WARNING: The Domain Name for your Salesforce Site will be immutable once registered and must be chosen carefully before proceeding any further.

Check the box next to
I have read and accepted the Salesforce Sites Terms and conditions.
Then, go to Register My Salesforce Site Domain to finish registration.

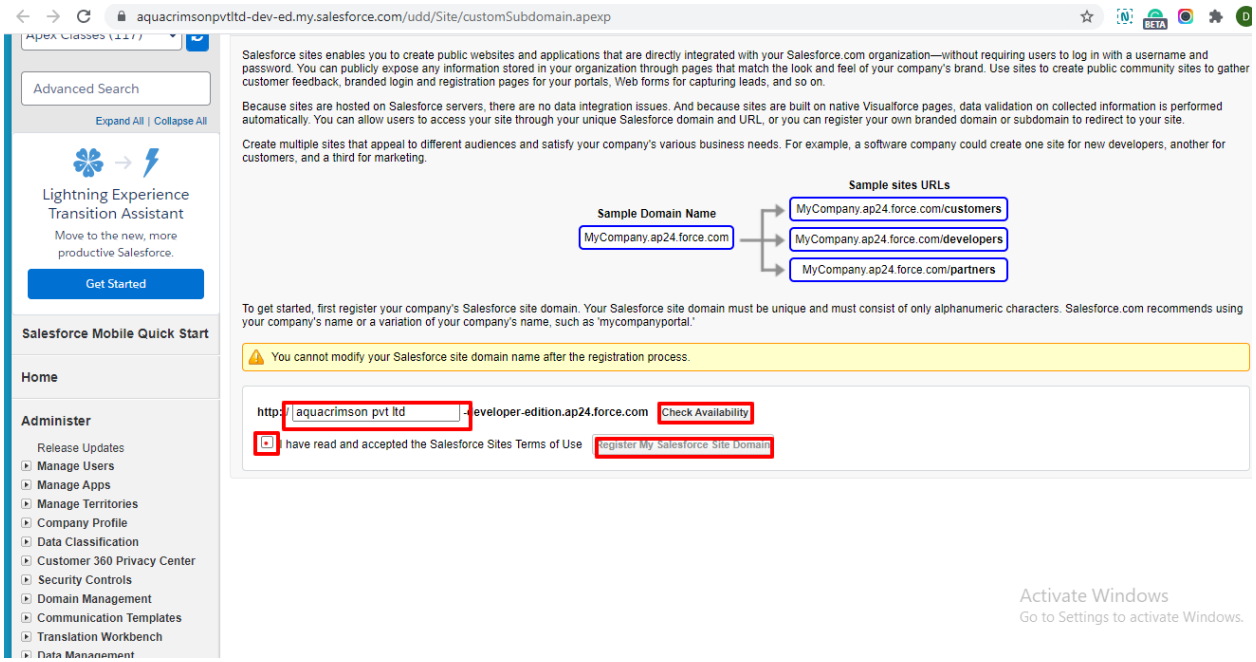


Figure 10

In a while, refreshing the page should display your Salesforce Site Domain Name as depicted in Figure 11

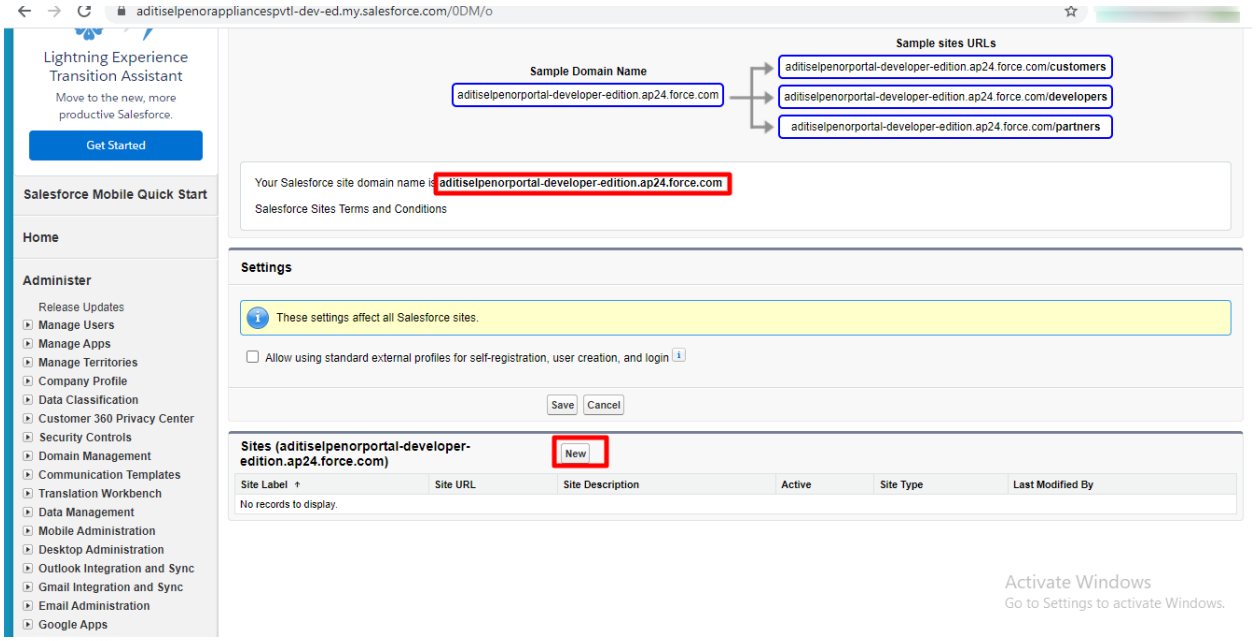


Figure 11

Click on “New” to create a new site.

From here. you will be taken to The Site edit page where you will need to create Your Site label and Site Name.

Now on the Site Edit Page, fill in mandatory fields marked in red as seen in Figure 12. You only need to enter the Site Label and Site Name.

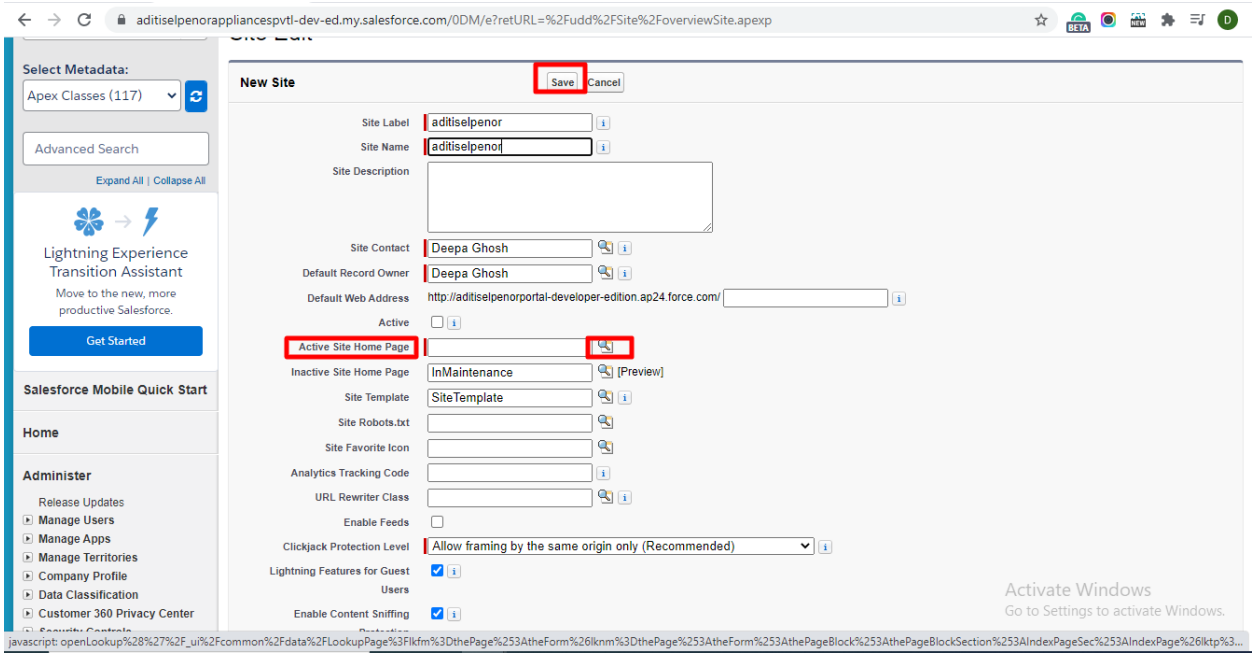


Figure 12

Fill in the Active Site Home Page field by opening the lookup next to it, and pick one of the values in the list of Recently Viewed Visualforce pages as shown in Figure 13

This populates the rest of the mandatory fields with appropriate values.

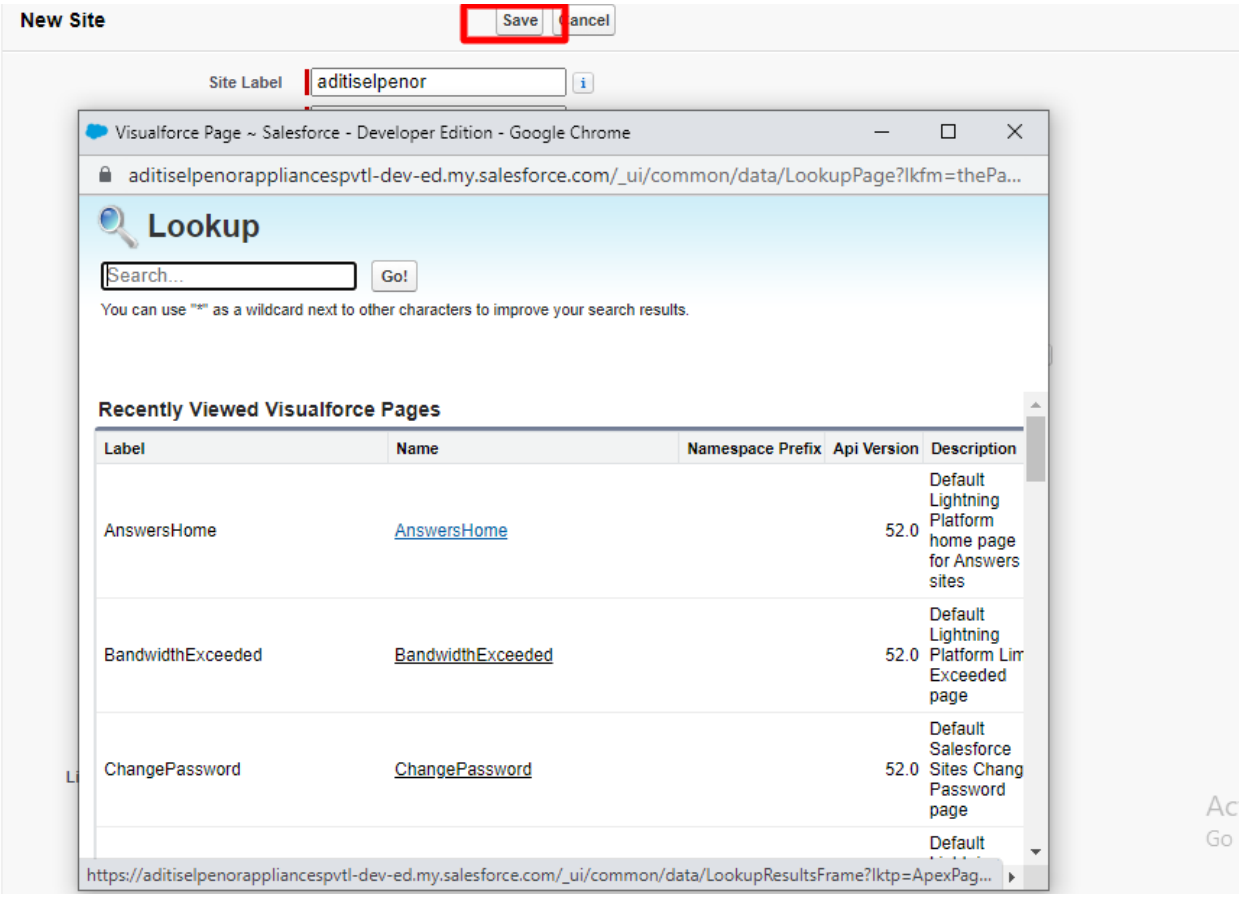


Figure 13

Now, click Save and finish creating the site.

On the following page, you should be able to see the site detail as seen in figure 14.

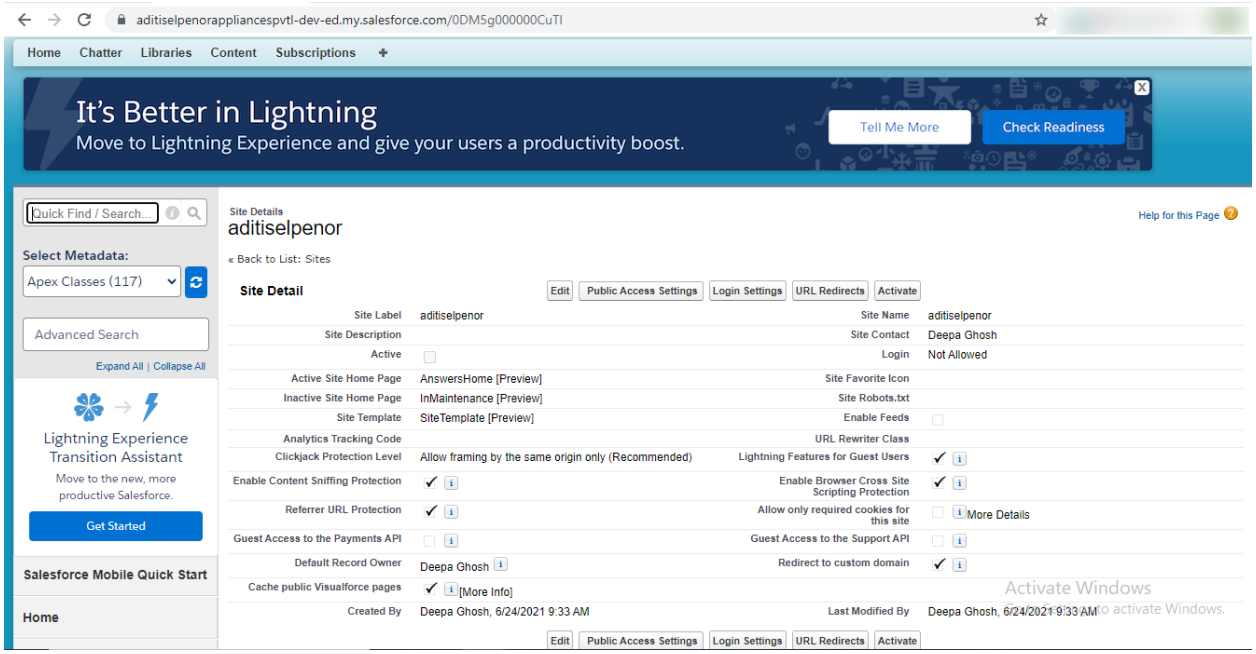


Figure 14

After The site is created, you will have to activate the site.

4.2 Activate the site created

From the same page, Go to Quick find/Search| Type Site| Sites|. See figure 15 for reference.

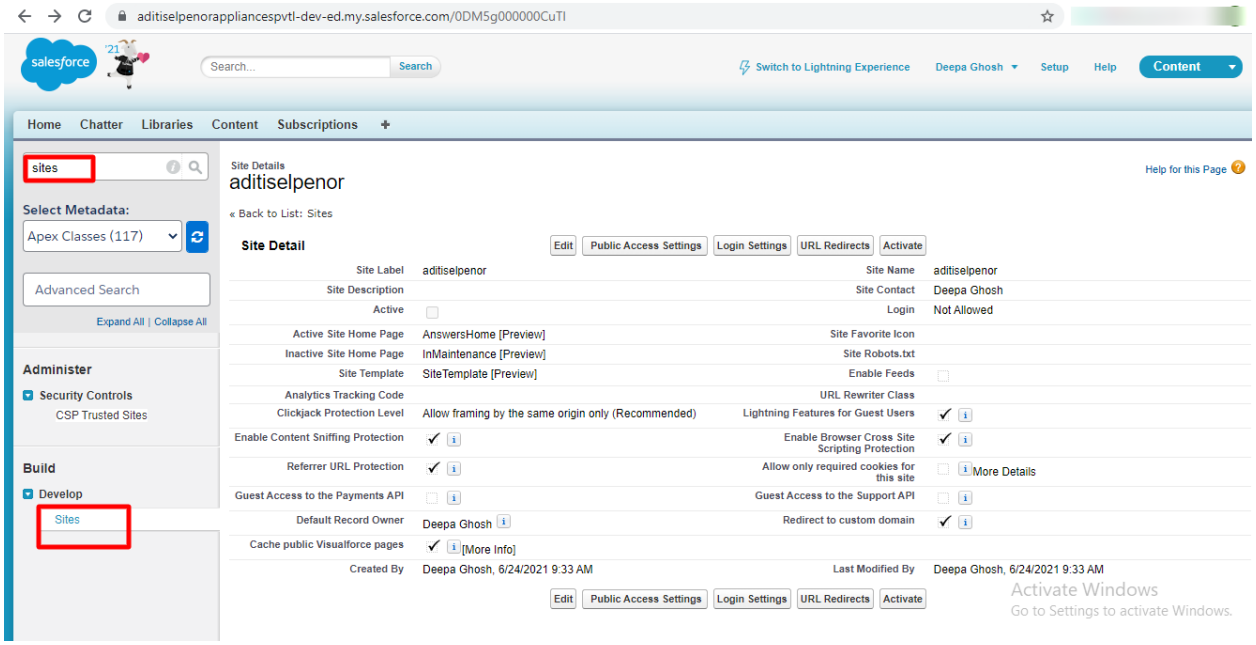


Figure 15

This redirects you to the webpage to activate your created site. Once on that page, click on ‘Activate” as displayed in figure 16.

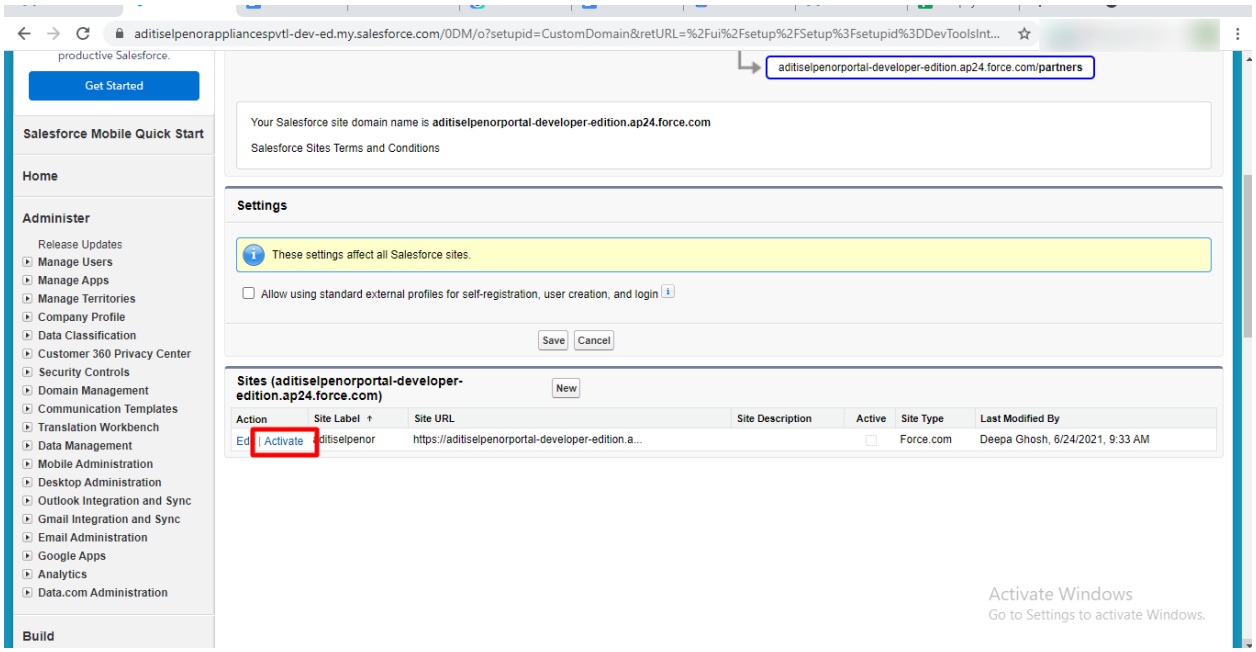


Figure 16

After the site is activated, go back to The Salesforce Shopify sync settings page to configure your site

4.3 Configure the Site

Here in Step 1 of the Salesforce Shopify sync settings page, Now it should configure your site.
You can click on Check Status after completion of authentication required.
Now, click on ‘Click here’ to configure the site as shown in Figure 17

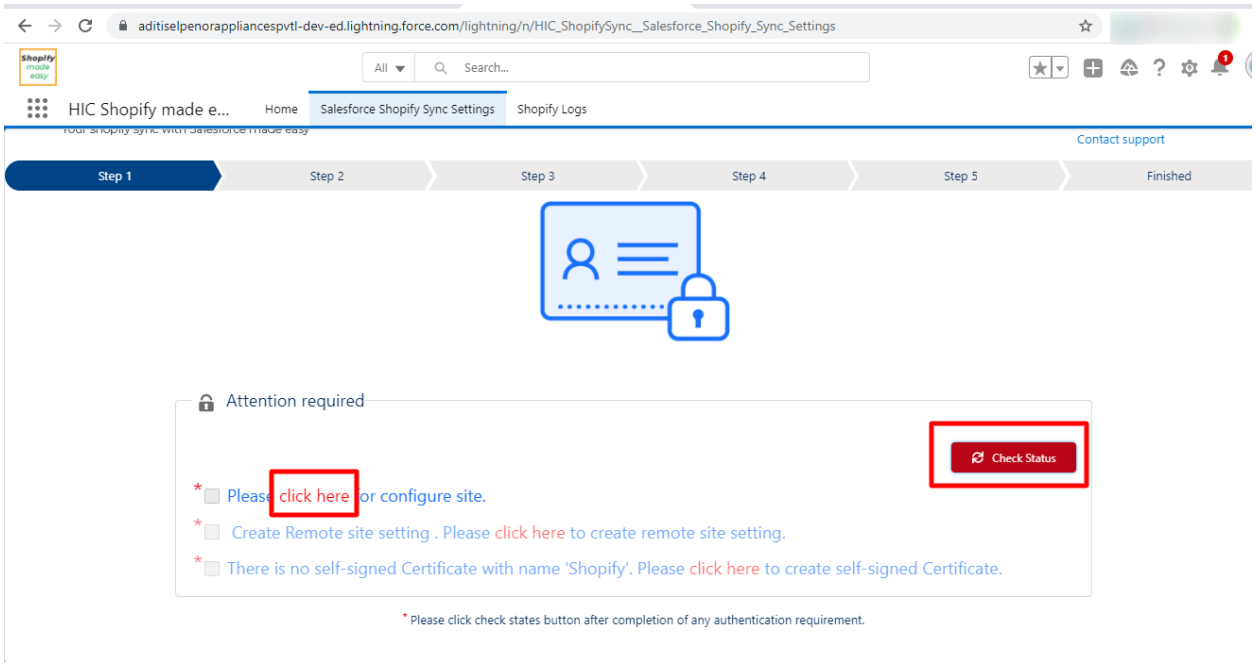


Figure 17

This will take you to the webpage to enter your site. Refer Figure 18

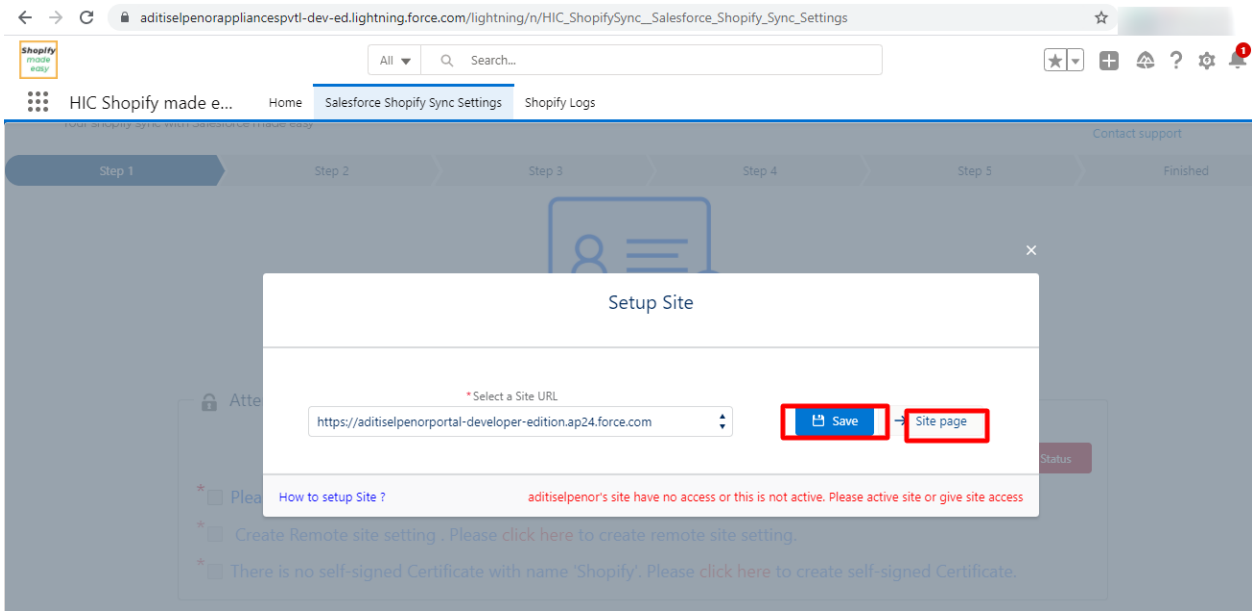


Figure18

Select your site and click on “Save”.
This will prompt a message asking you to give access to the site.
Click on Site Page to edit the site access.

You should be now on the Site details page, Click on Public Access Settings as seen in figure 19

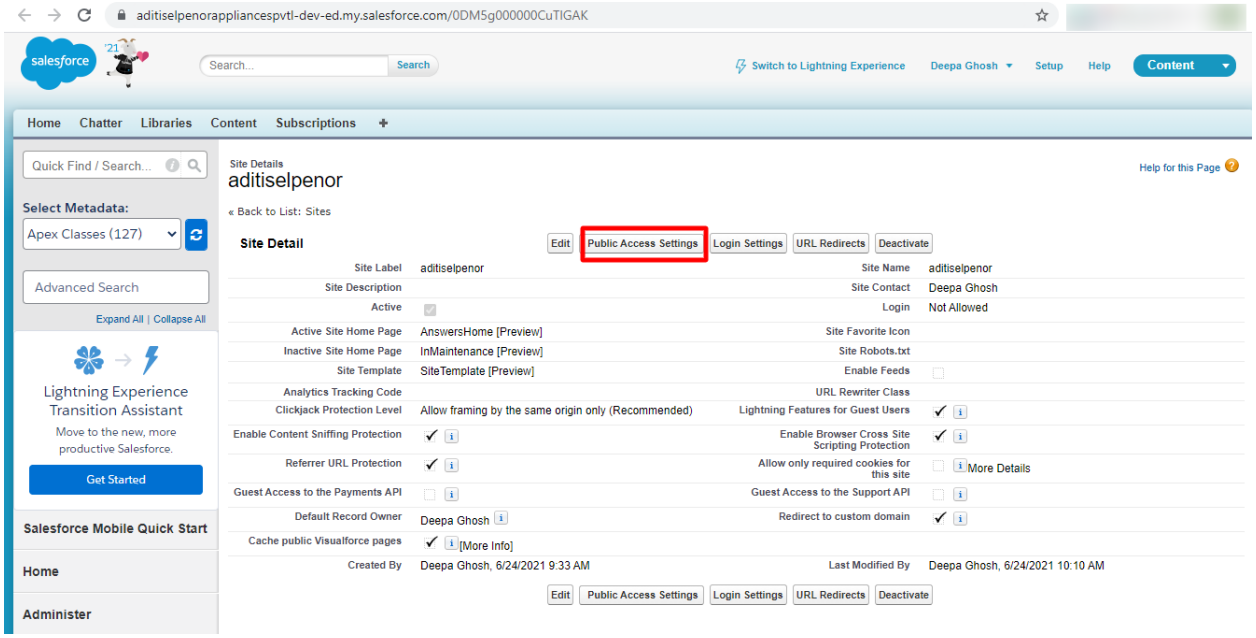


Figure 19

This brings you to the Profile page.
Here, Click on "Enabled Apex Class Access" as shown in Figure 20.
Then Click 'Edit'.

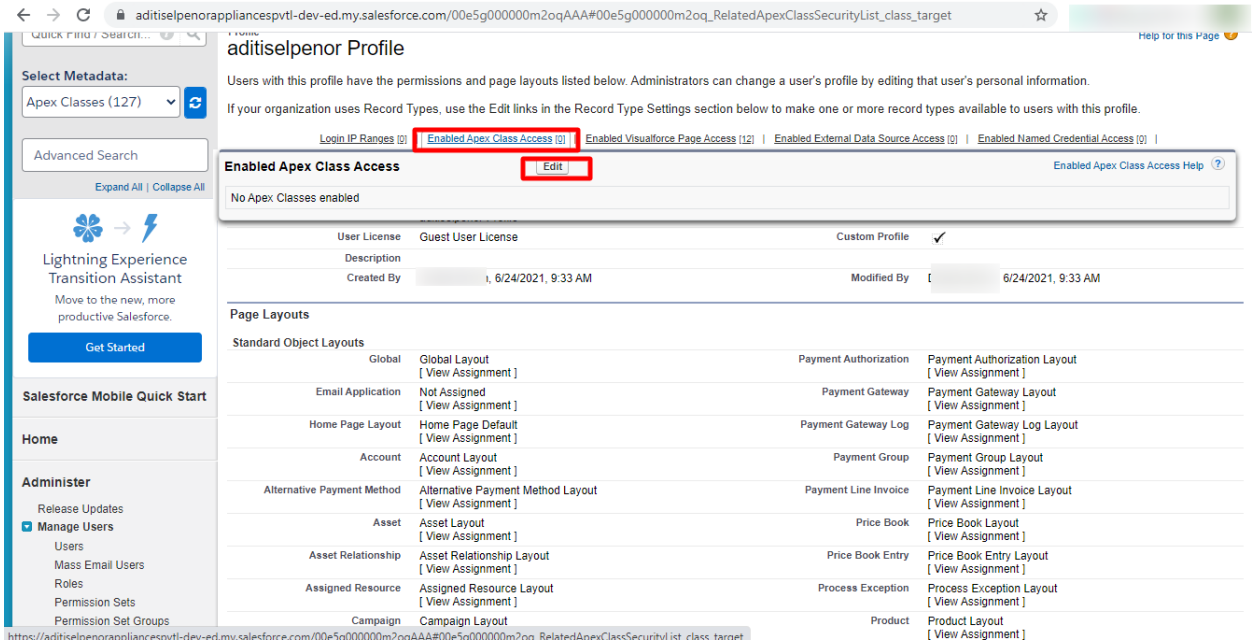


Figure 20

You should be on Enable Apex Class access page,
Here, Select 'HIC_ShopifySync.Authenticate all apex class and click on ADD and then SAVE. Refer figure 21

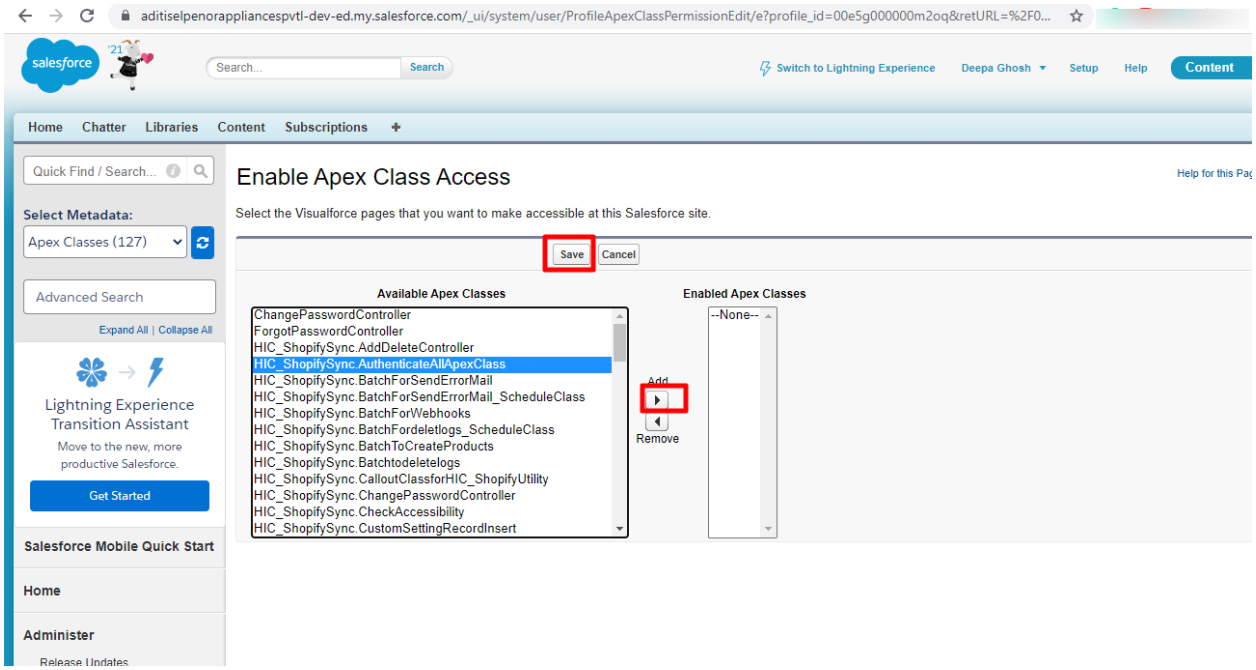


Figure 21

Once you have given access to the site, go back to the Sync Settings page click on ‘Click here” to configure the page as seen in figure 22.

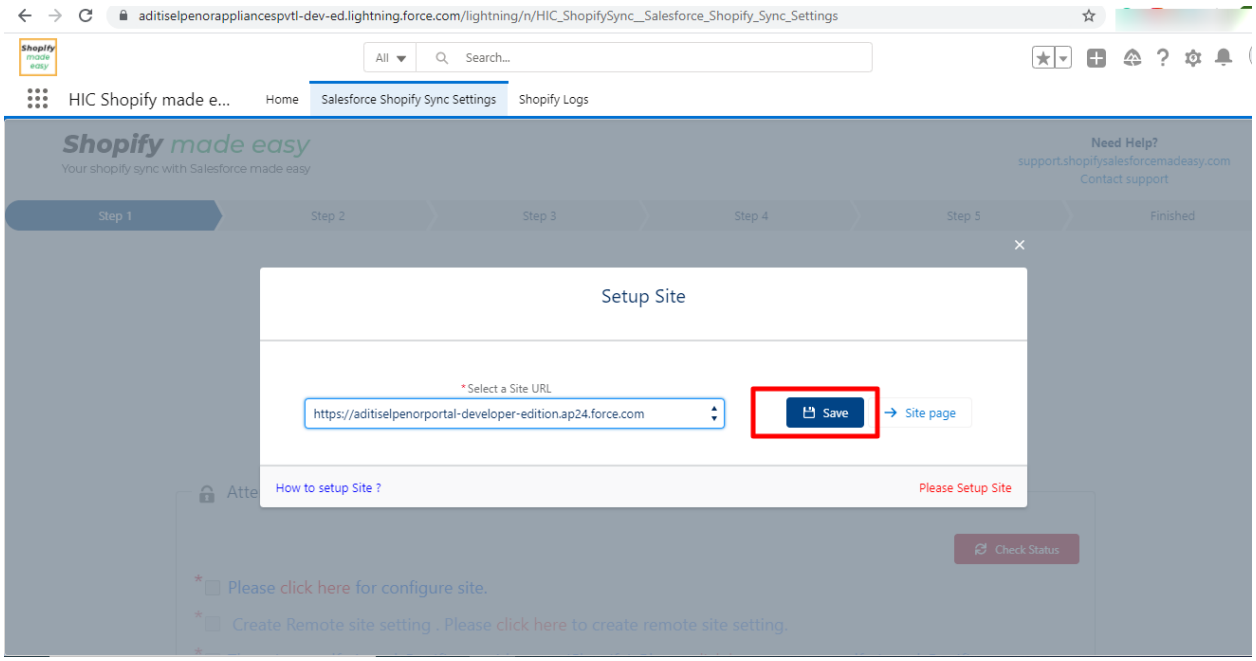


Figure 22.

On the sync setting page, you can now click on” Check status “.

4.4 Remote Site Settings

On the Shopify Salesforce Sync Settings, the next step is to create remote site settings. Click on “Click here” to create remote site settings as seen in figure 23.

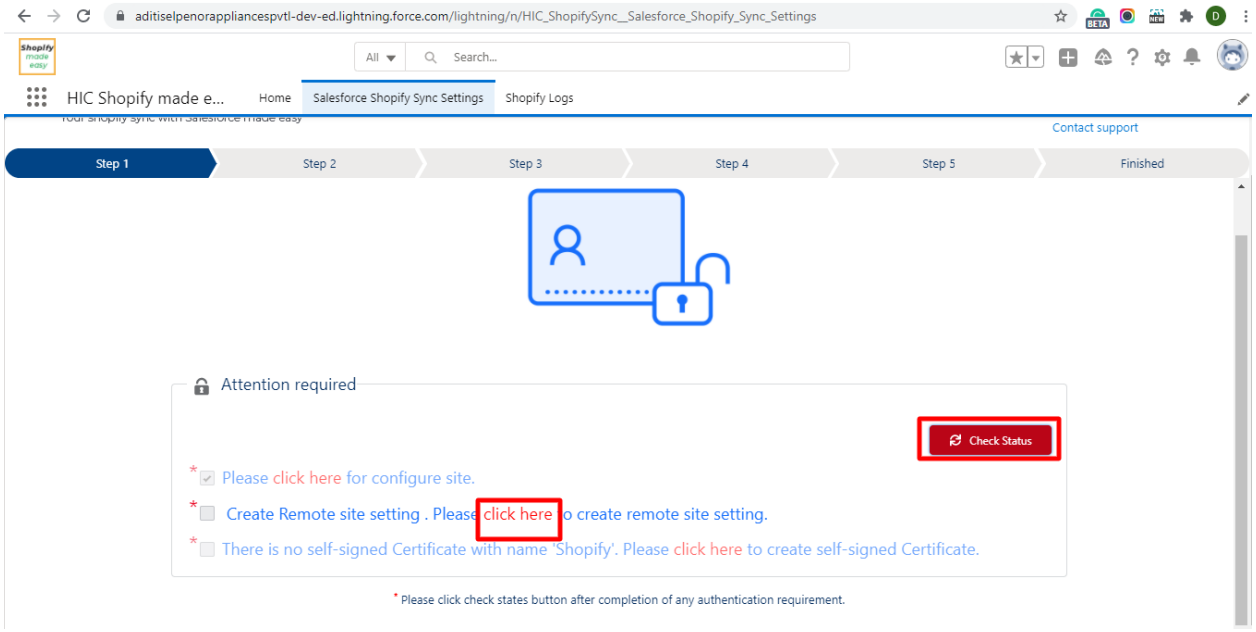


Figure 23

Now, the remote site details page is displayed

.

The remote site details and Site URL is filled in by default.

Click on “Save “ to save the remote site details as shown in Figure 24

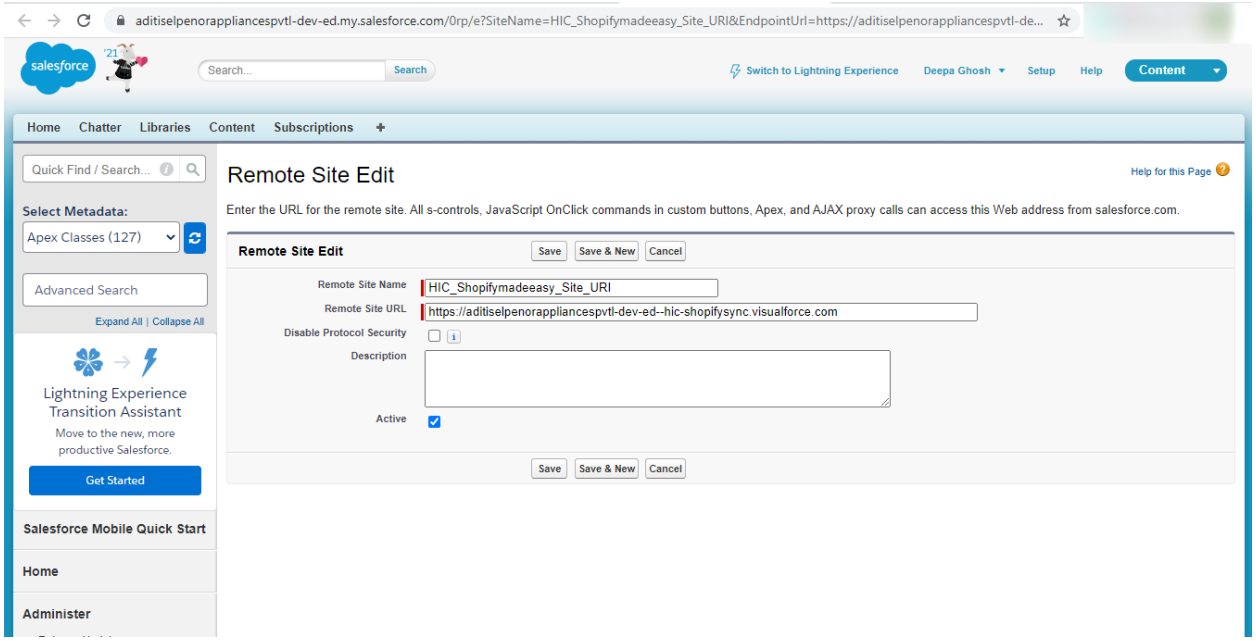


Figure 24

Go back to the sync settings page and click on “Check Status” to see the authentication status.

4.5 Generate Self-Signed Certificate

In this step, we will generate a self-signed certificate with the name “Shopify”.
Go to the Salesforce Shopify sync settings page and click on “click here”.See Figure 25

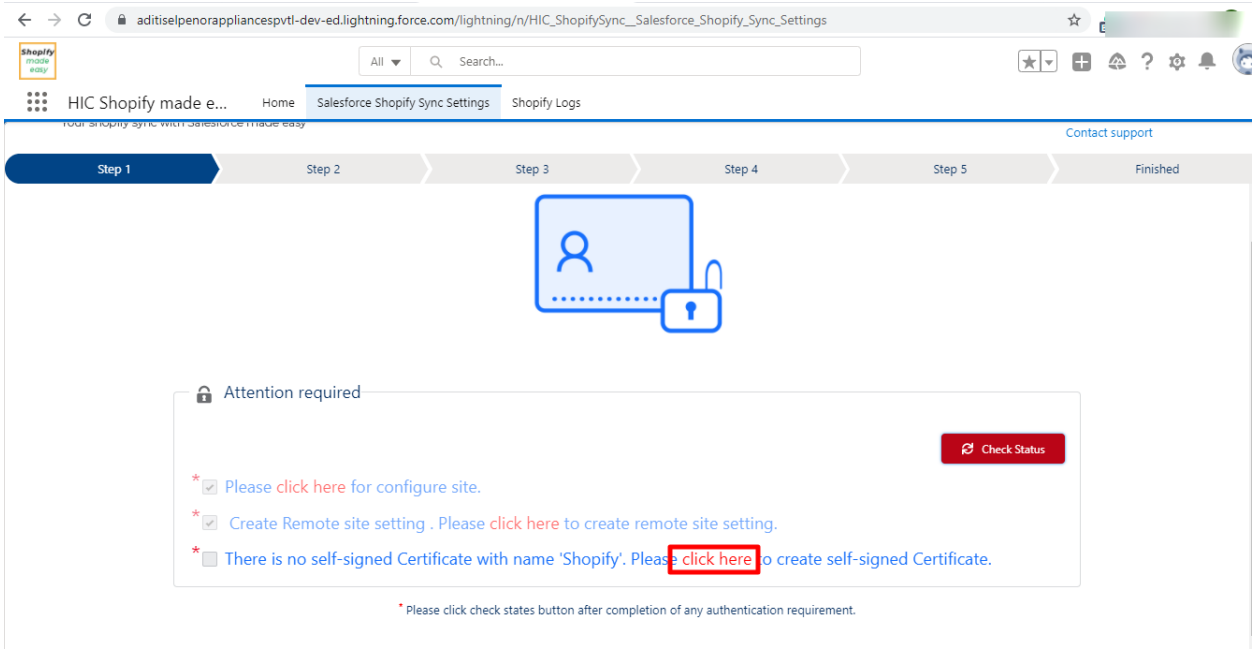
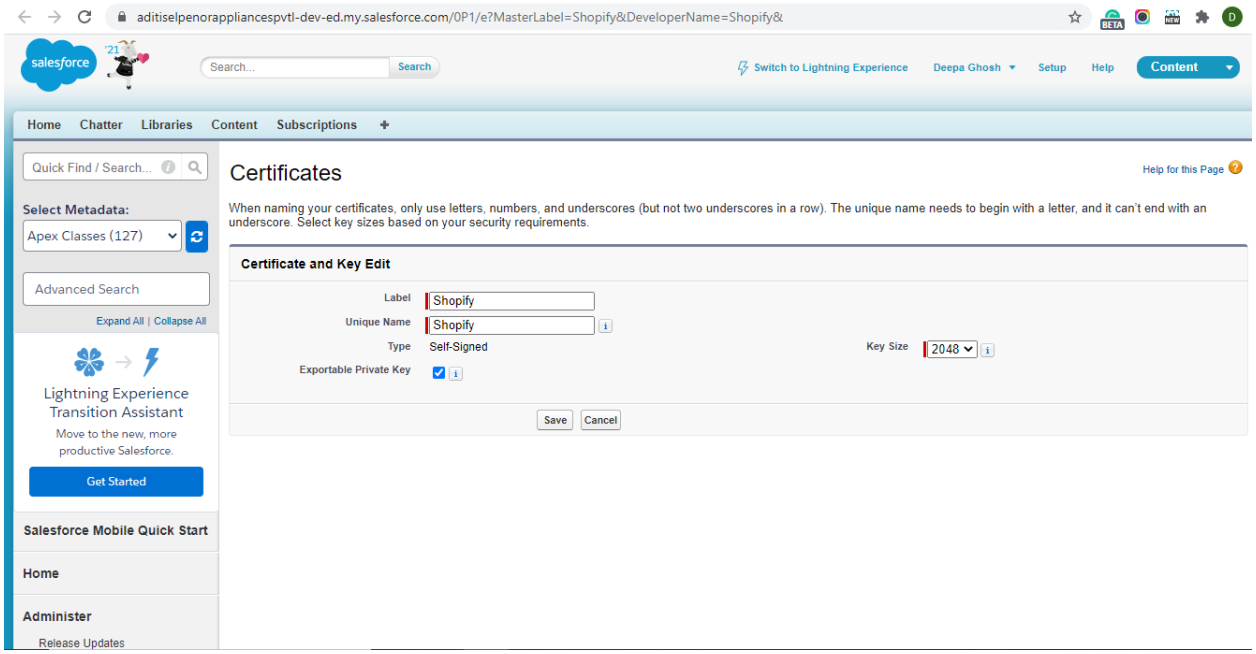


Figure 25

On the Certificate page, click on “Save” as seen in figure 26



\ Figure 26

The next page will display the site details.
Again, Go back to the sync settings page and click on “Click Status”.
Now you should now see the initialization page.
Click on “Initialize” as seen in figure 27

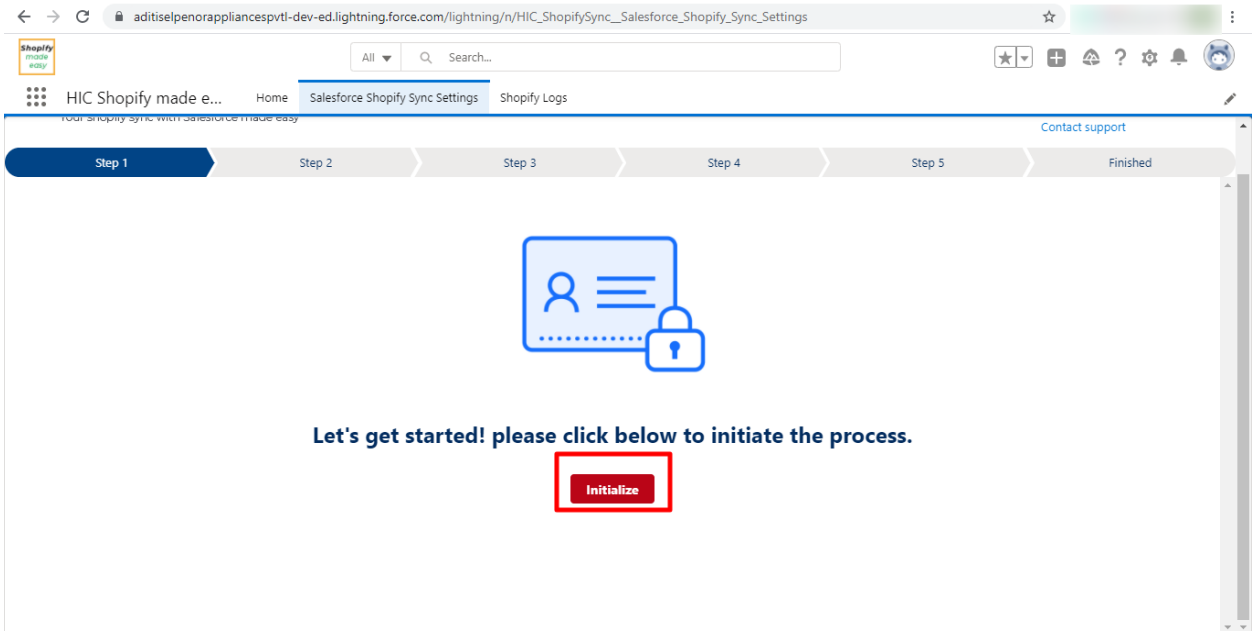


Figure 27

On the next page. Click on “Allow” to allow access See Figure 28

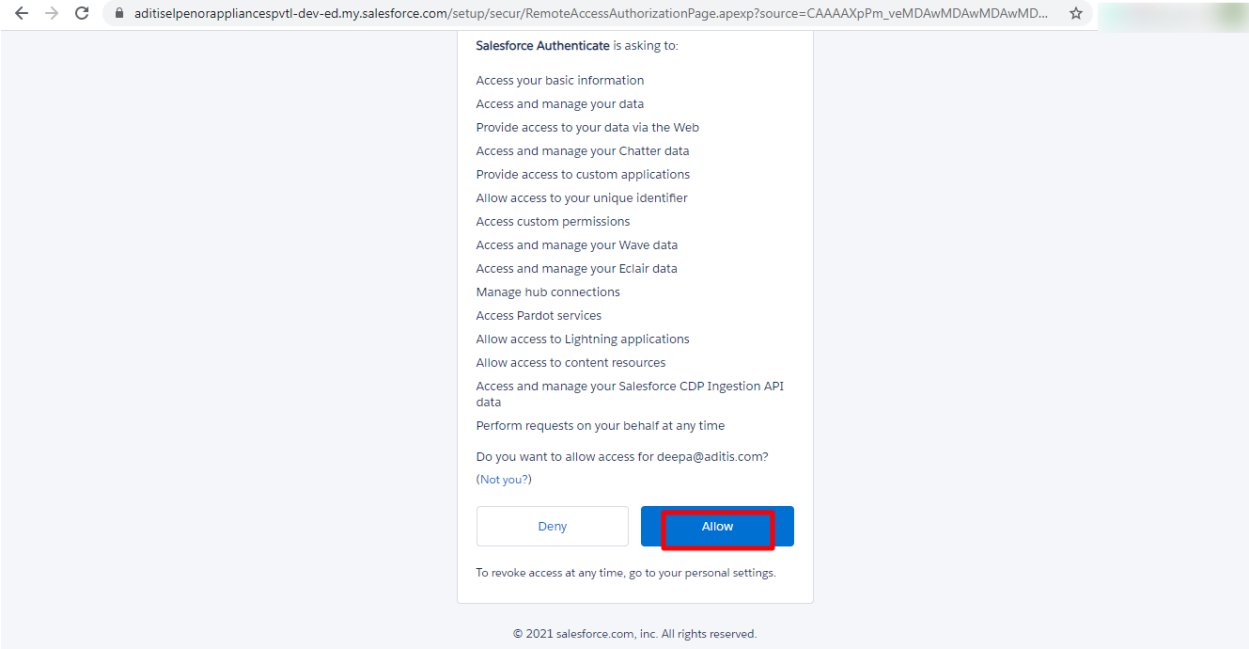


Figure 28

On this page, initialization is done, Now Click on “Go To Next Step”.See Figure 29

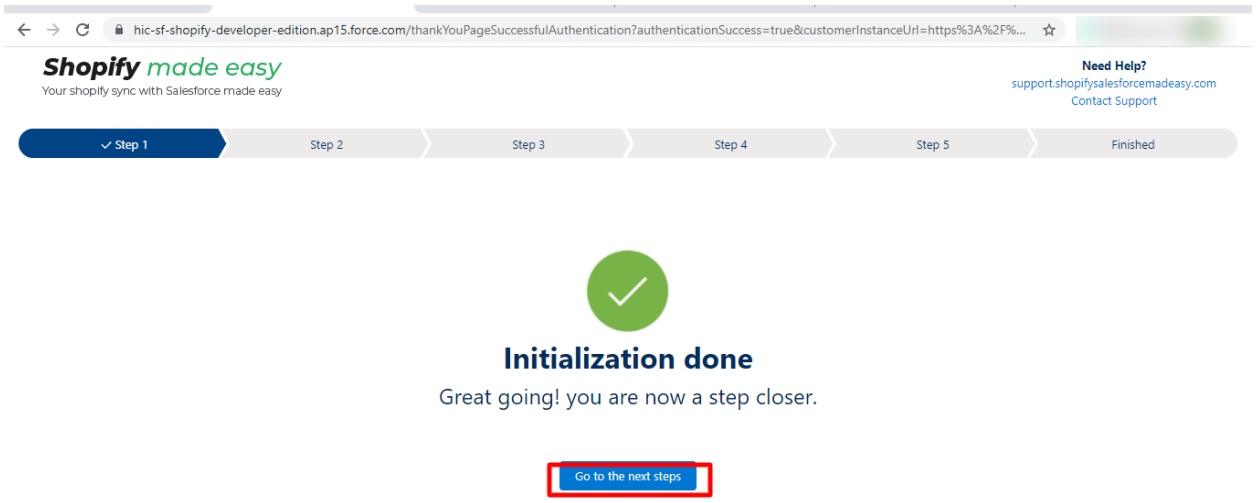


Figure 29

5.Retrieving Shopify Store API key and Password

Here onwards, STEP 2 begins.
In Step 2, you will need Shopify Store URL and API key Password.as seen in figure 30

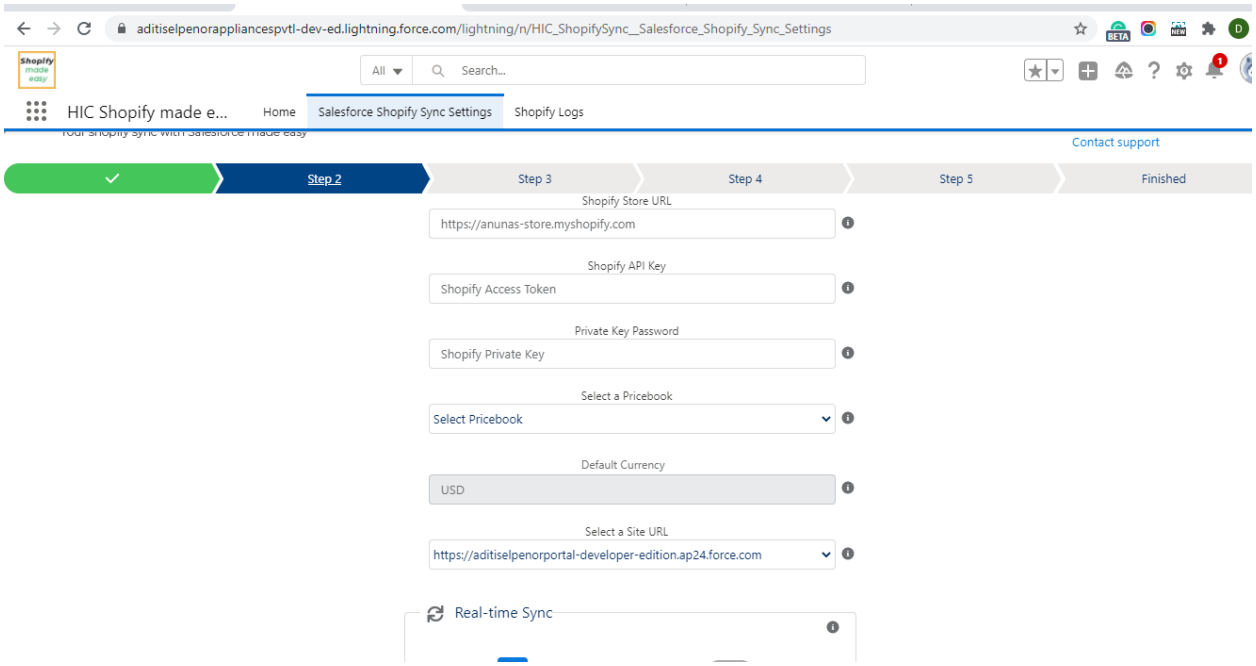


Figure 30

5.1Shopify Store URL and API Key,

To retrieve Shopify Store URL and API key,
Open another tab, go to https://www.shopify.com/ and log in using your store credentials.

After logging in, you should be on the homepage of your store.You can find the store URL on the top of the page.
From the same page, Go to Apps. Refer Figure 31

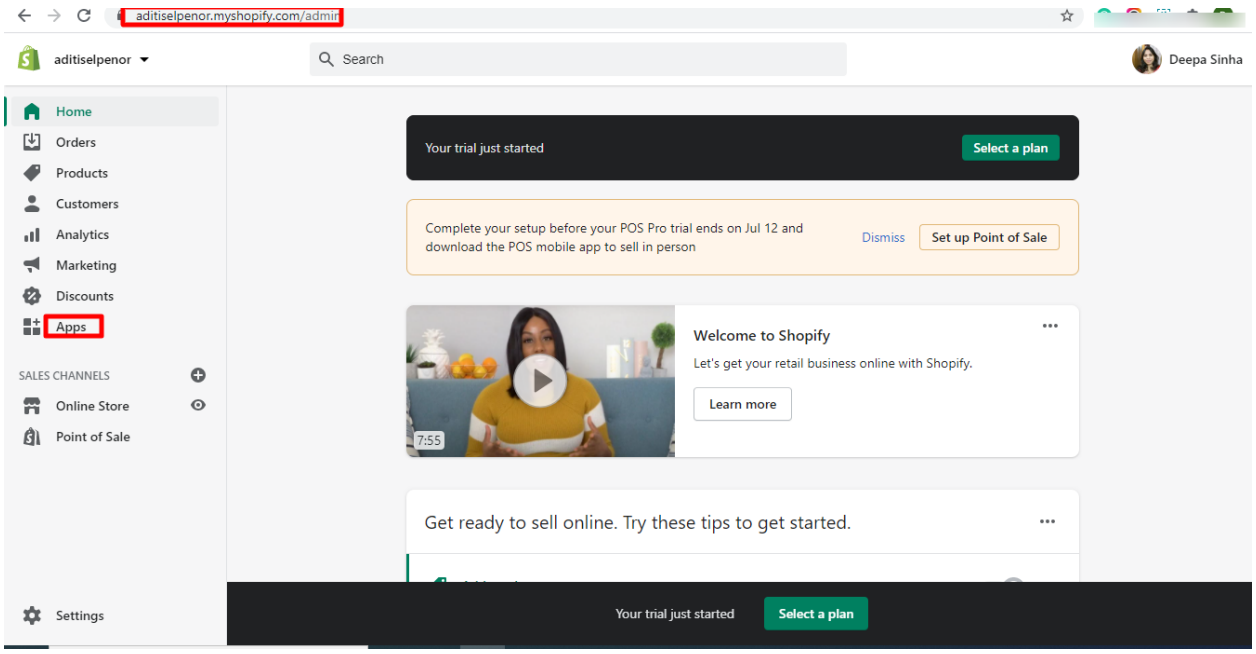


Figure31

On this page.scroll down at the bottom and click on “Manage Apps” See figure 32

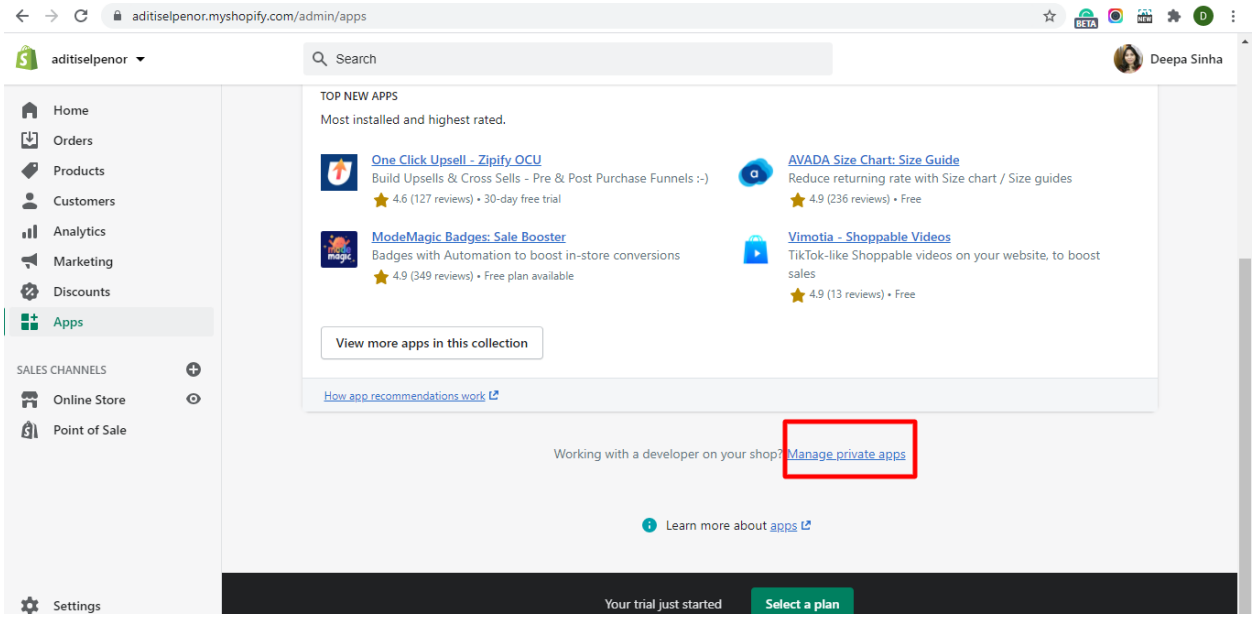


Figure 32

This will bring you to the Private App page,click on “Enable App Development”. Refer figure 32

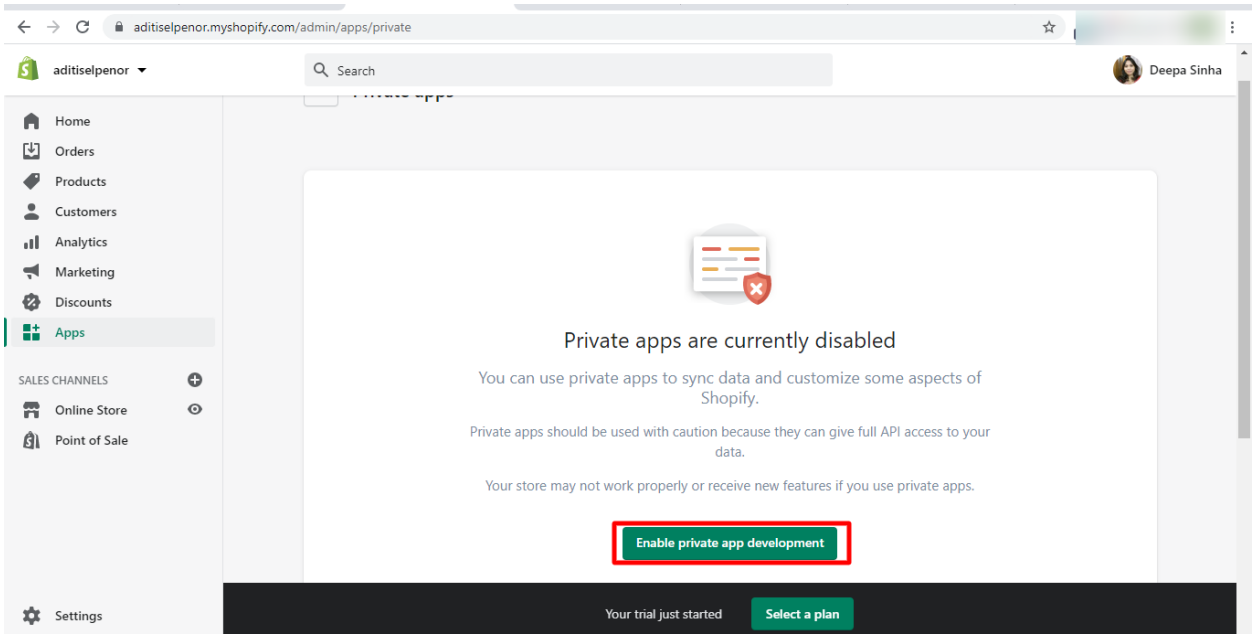


Figure 32

Here, Tick on all the check boxes and click on "Enable app development" as seen in Figure 33

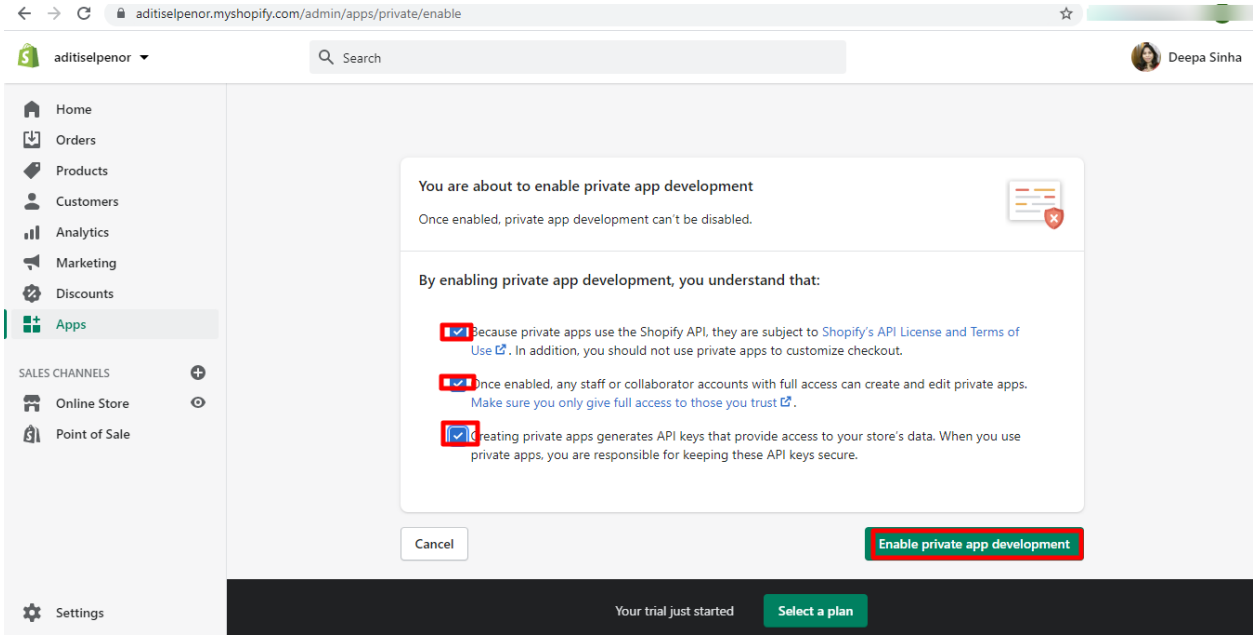


Figure 33

Once you have enabled app development, you will be displayed a webpage to create apps.
Click on Create Private apps as shown in figure 34

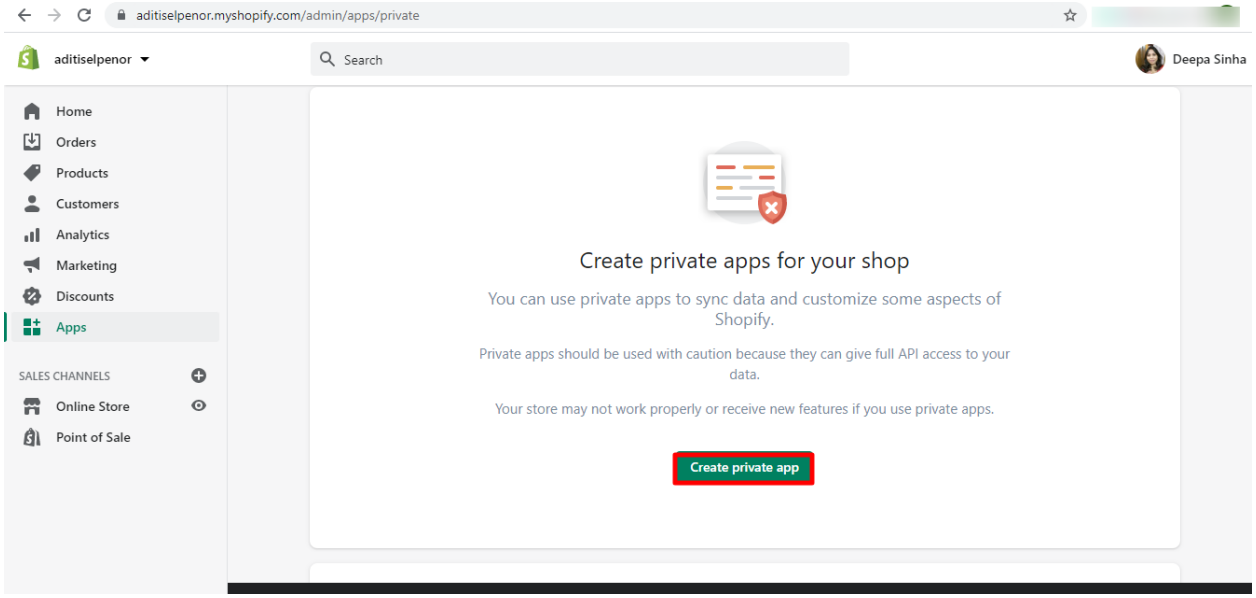


Figure 34

On the create app page, fill in App name and email id and then click on Save. See figure 35

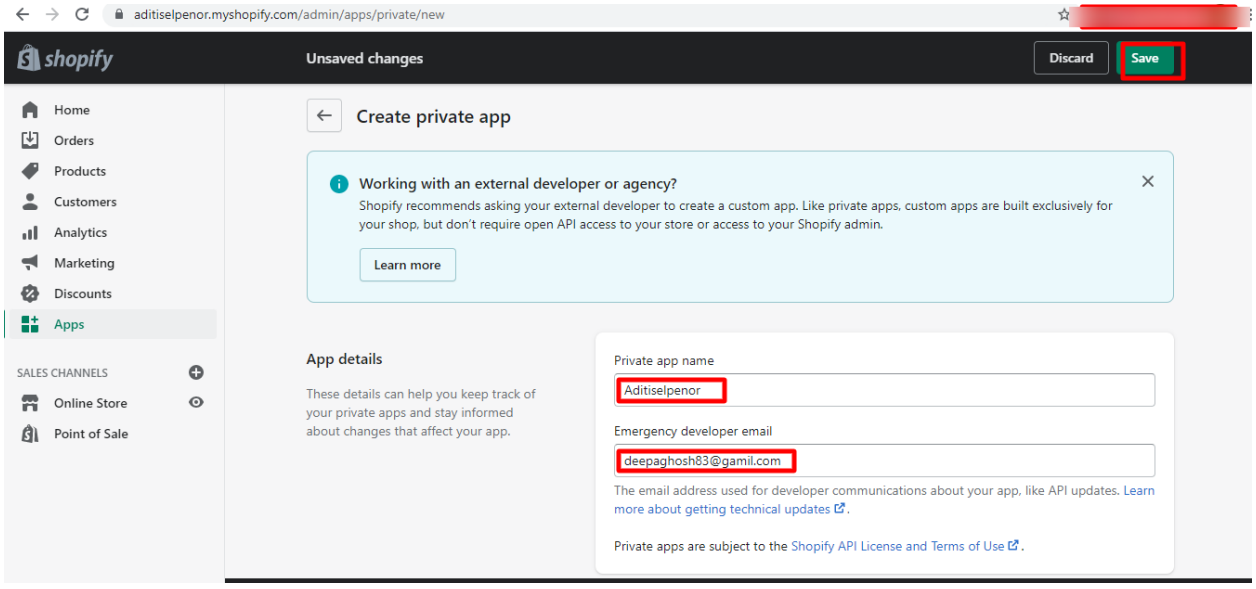


Figure 35

On clicking save ,you will be prompted to create app.Click on Create app as in figure 36

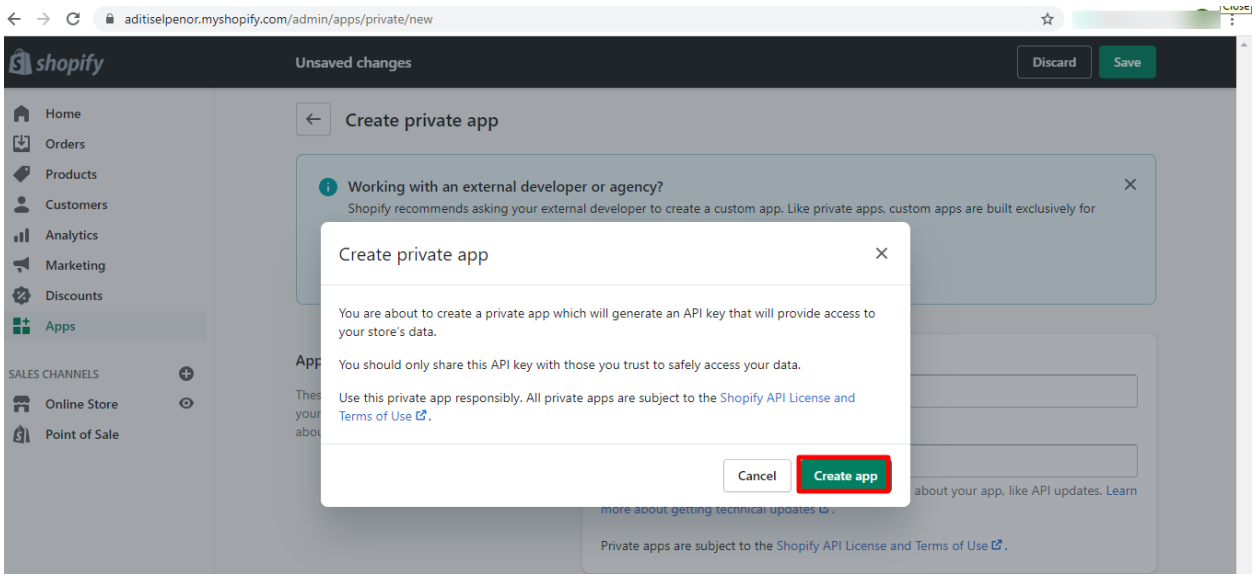


Figure 36

Your app will not be created until you give Active API permissions.
On the same webpage , to give permissions for the active Admin API,.

Scroll down and drop down the "Show Active API permissions" menu. See figure 37

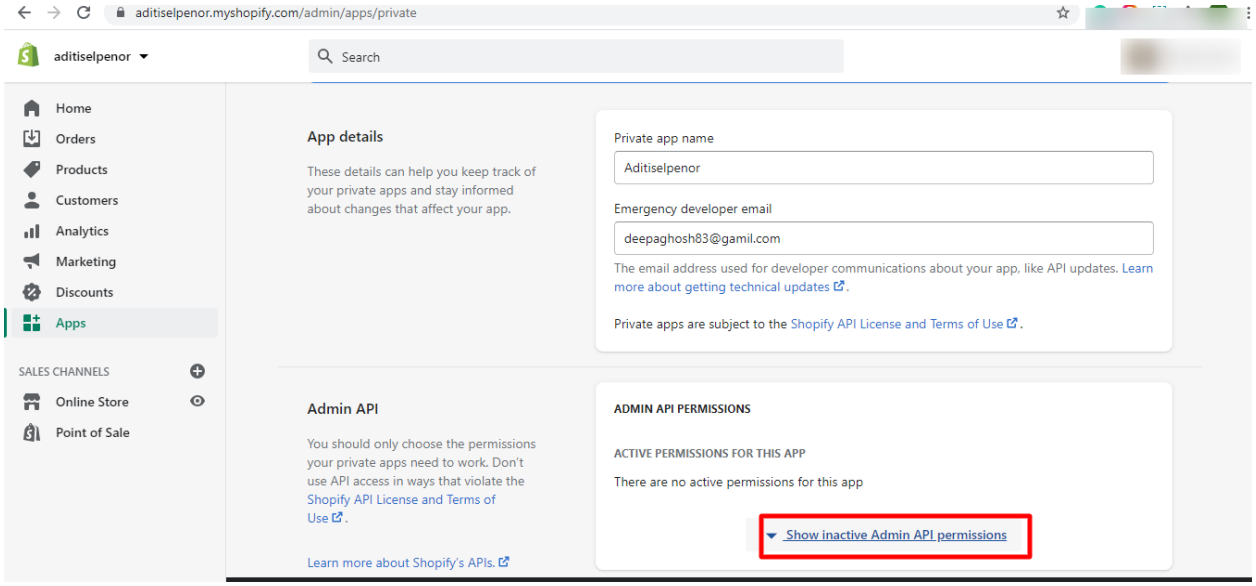


Figure 37

After clicking on Show Inactive Api Permissions,we shall be able to see all the active App permissions for this app.
However,these mandatory permissions must be given access for proper functionality.

- Customers
- Location

- Inventory
- Draft Order
- Product
- Order

Figure 38,39 and 40 shows the Admin API permissions.See for reference

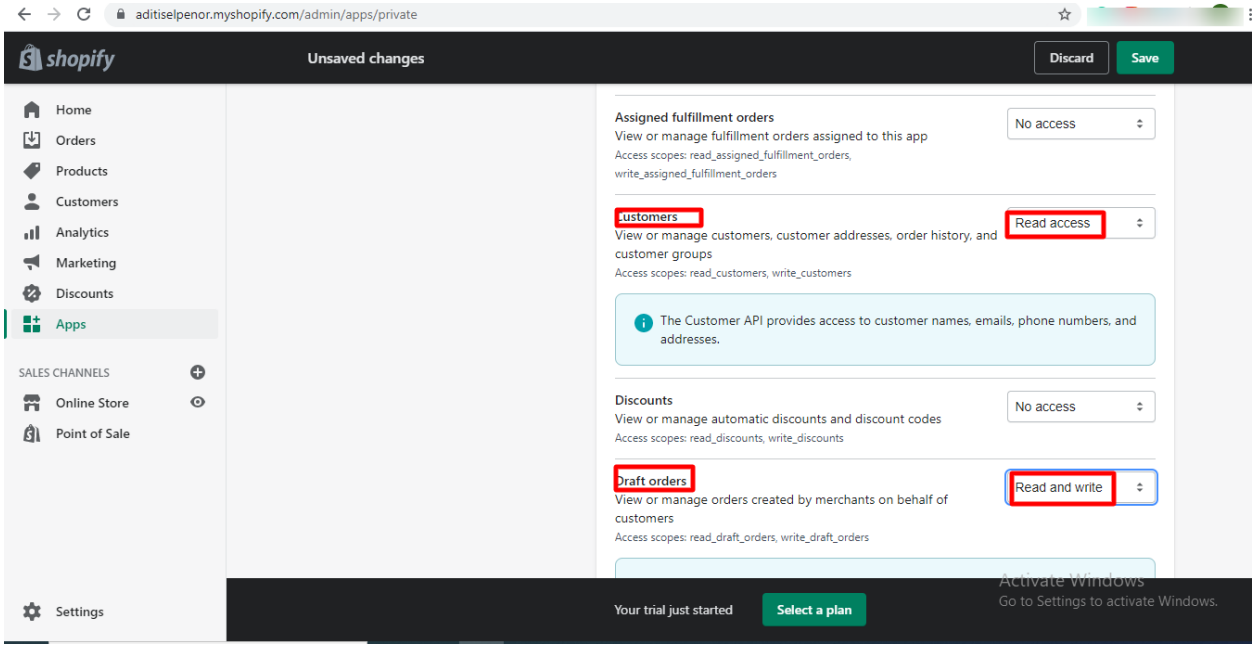


Figure 38

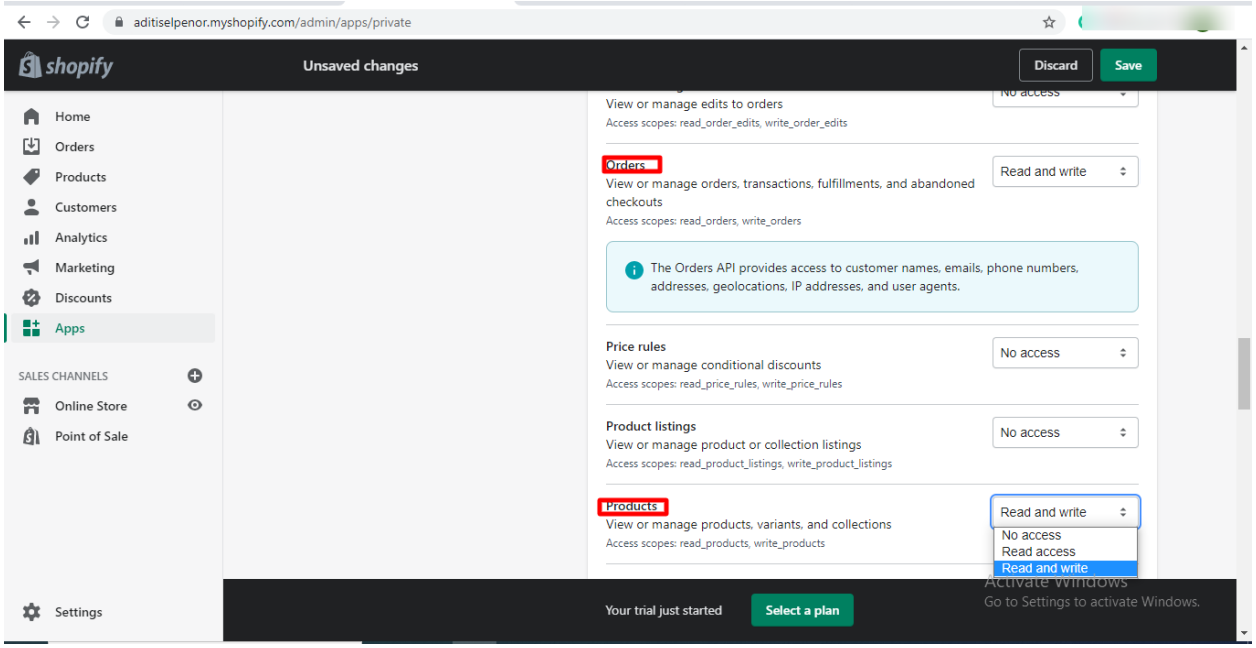


Figure 39

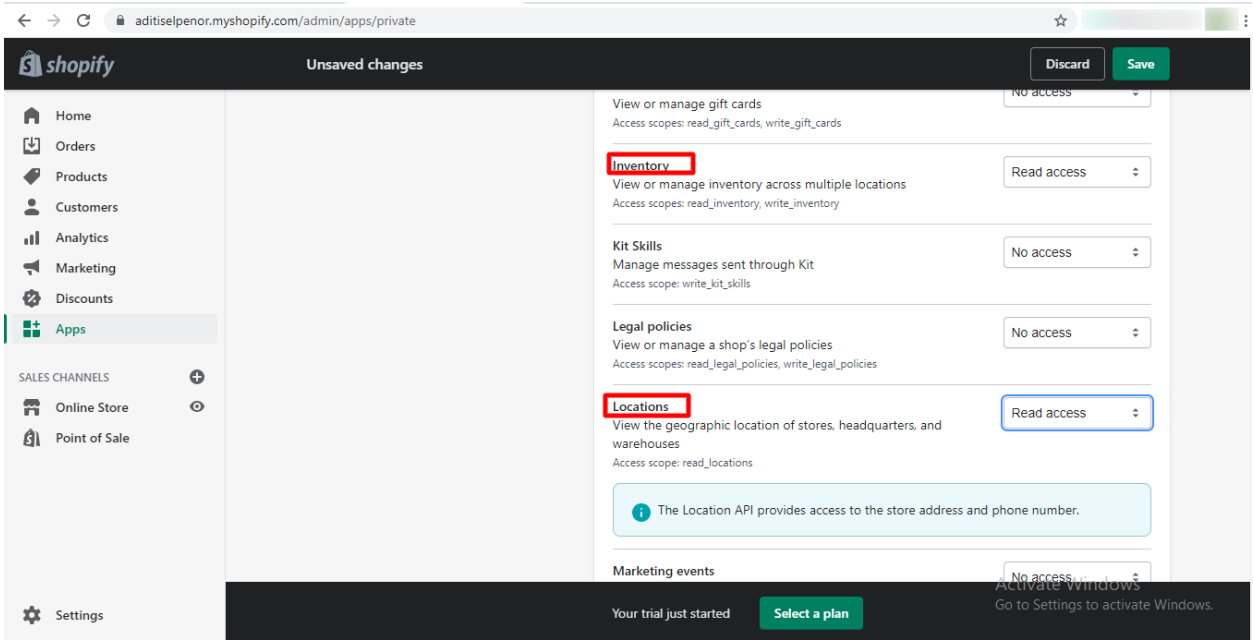


Figure 40

After giving access to mandatory ADMIN permission. Scroll down and Check the box to allow the app to access yourIstore front data. And click on "Save" See figure 41

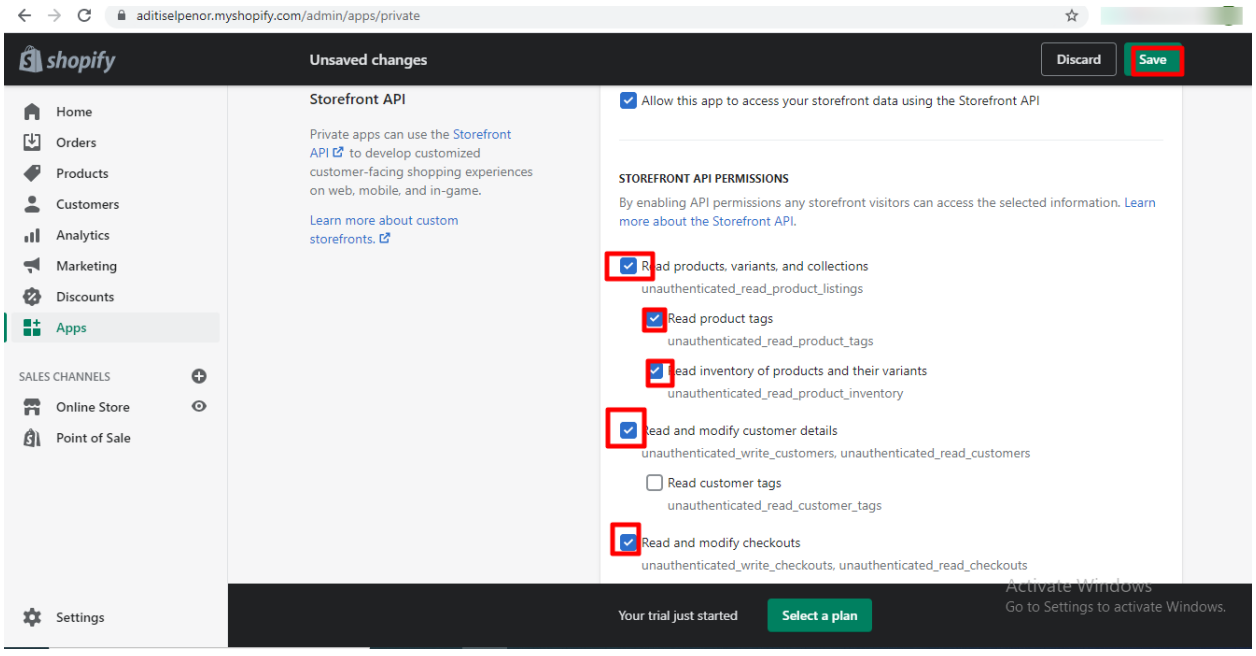


Figure 41

On the next webpage ,you should see your app is created.Scroll down to find your API key,Password and store URL as marked in figure 42.

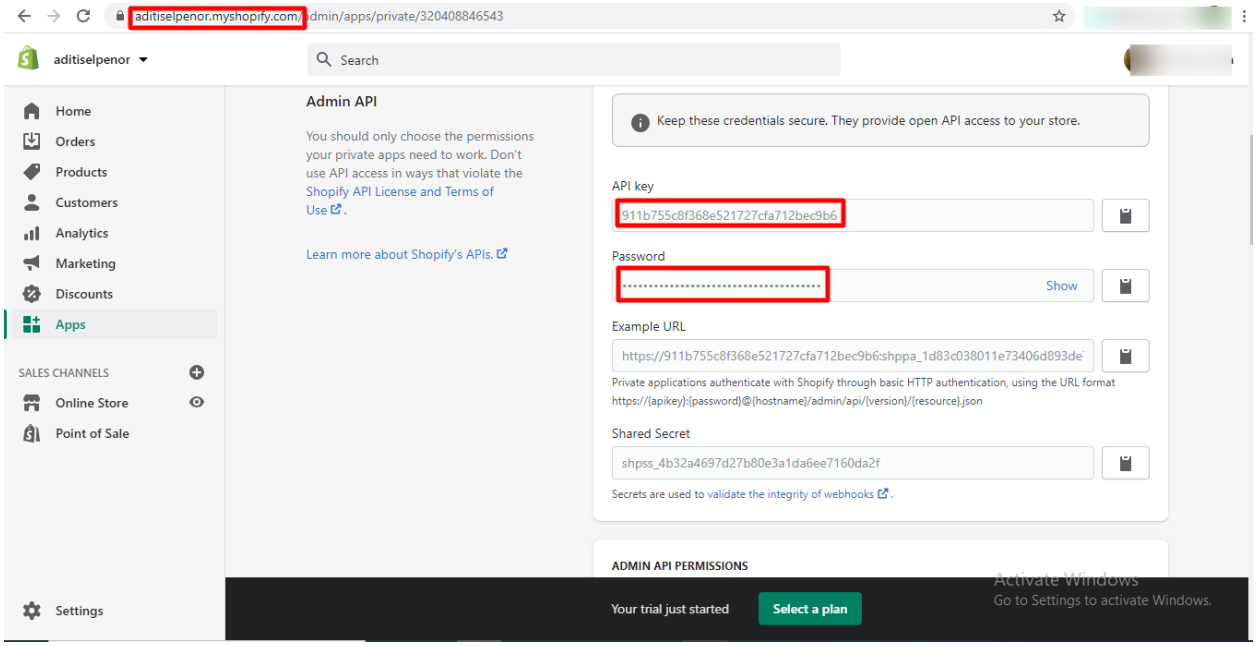


Figure 42.

Now we have retrieved the API key ,Password and Shopify store URL,we will go back to the Salesforce Shopify sync settings page in Salesforce to complete Step 2.

Once in the page,type in Shopify URL,API KEY and Password in their respective fields. Refer figure 43

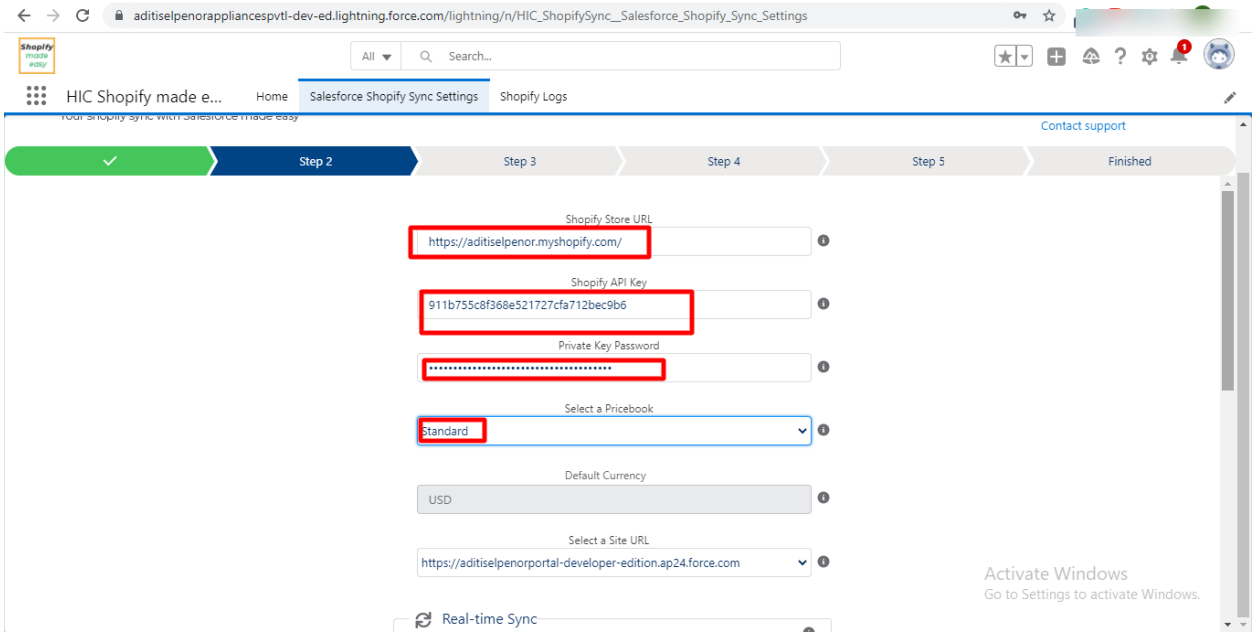


Figure 43

Scroll down on the same page,select email id .You can provide more than one email id by clicking the"+" button and click Save and Go to Next Step as inFigure 44.

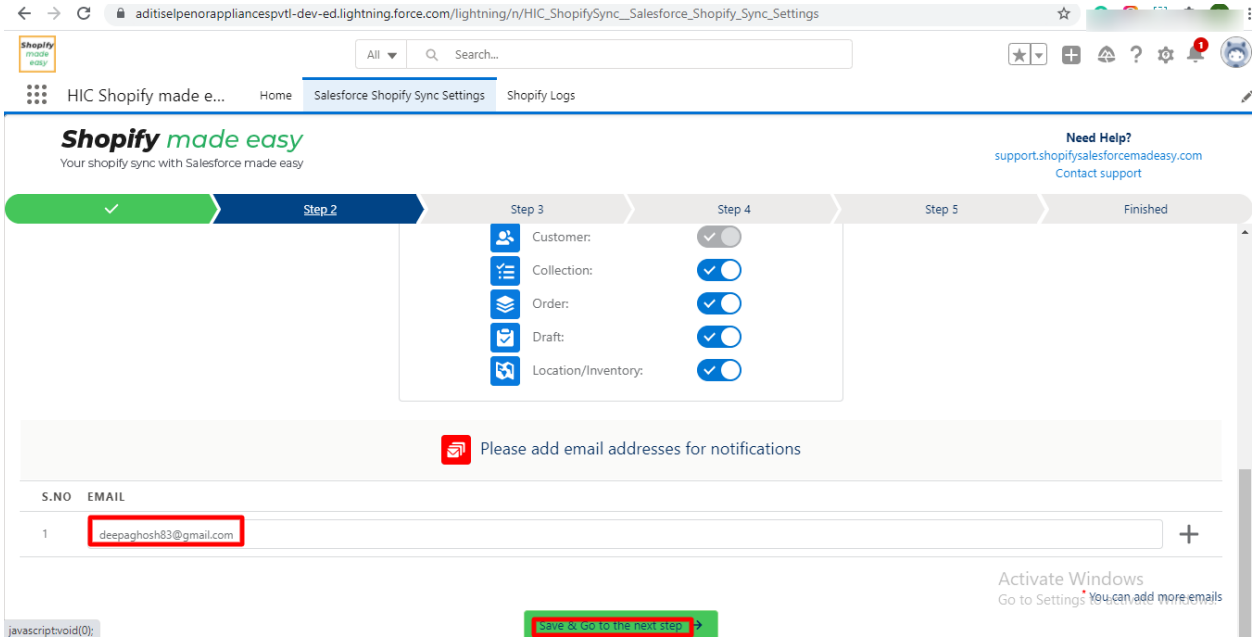


Figure 44

This completes step 2 and you should be now on step 3.
In step 3, You can use the toggle button to choose objects to enable between Salesforce and Shopify platforms or you can continue with the default setting.Click on Save and Go to Next.
See figure 45

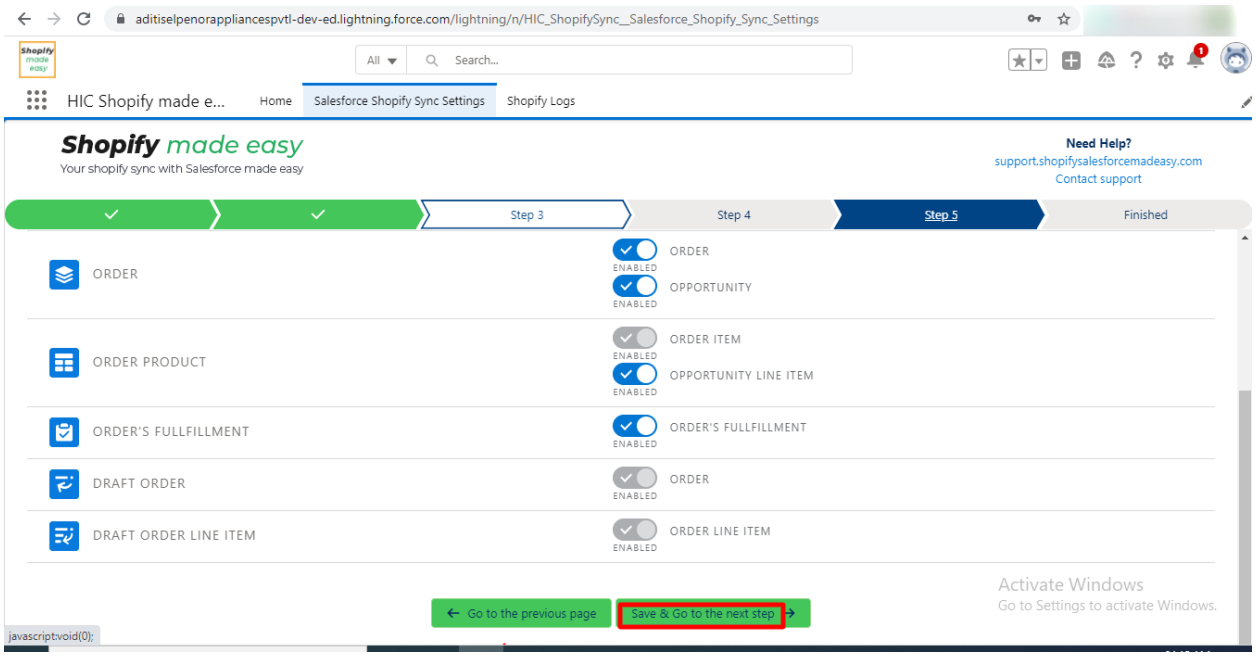


Figure 45

On step 4, you can choose to use the default Field Mapping.Click on Save and go to Next as in Figure 46

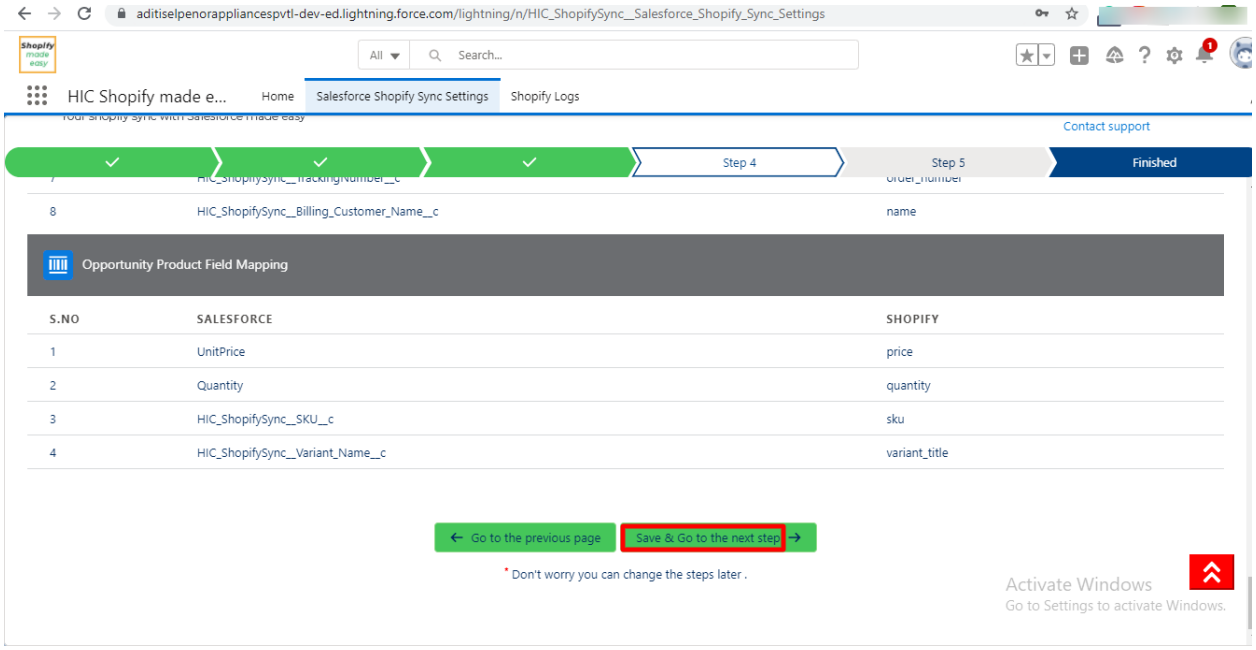


Figure 46

Now comes Step 5,You can choose the record type or can continue with the default value. Click Save and go to next as seen in figure 47

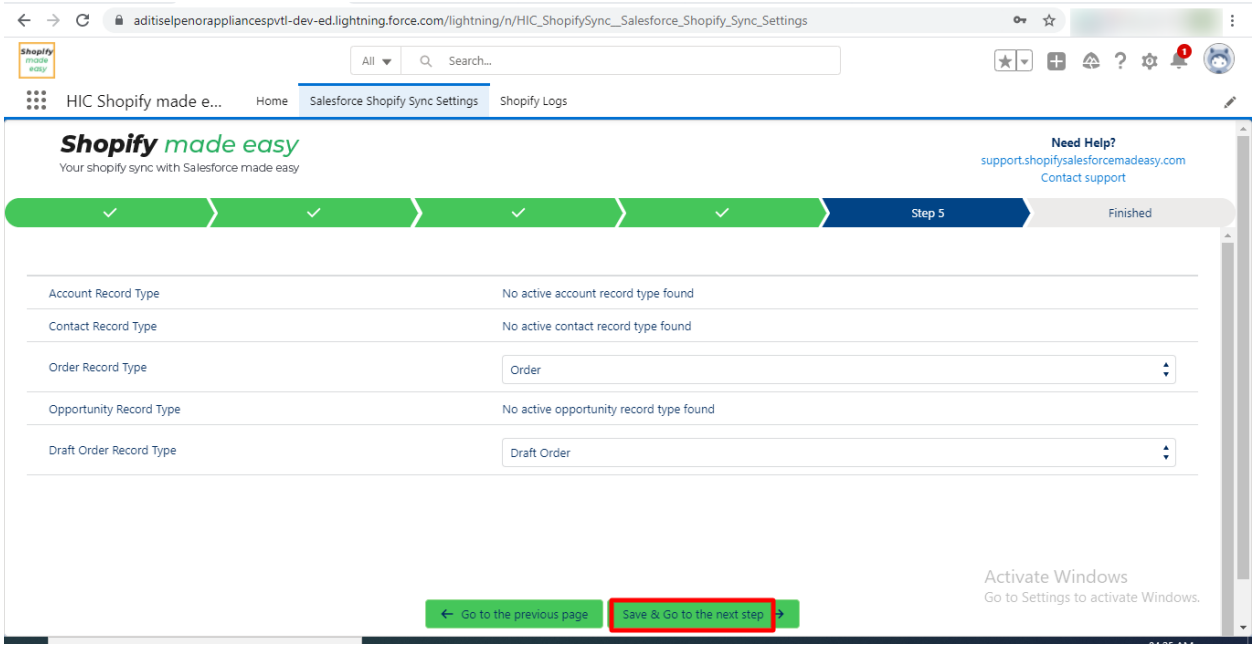


Figure 47

After step 5,you should be on the web page to start with the synchronization process. Click on Start sync As in figure 48

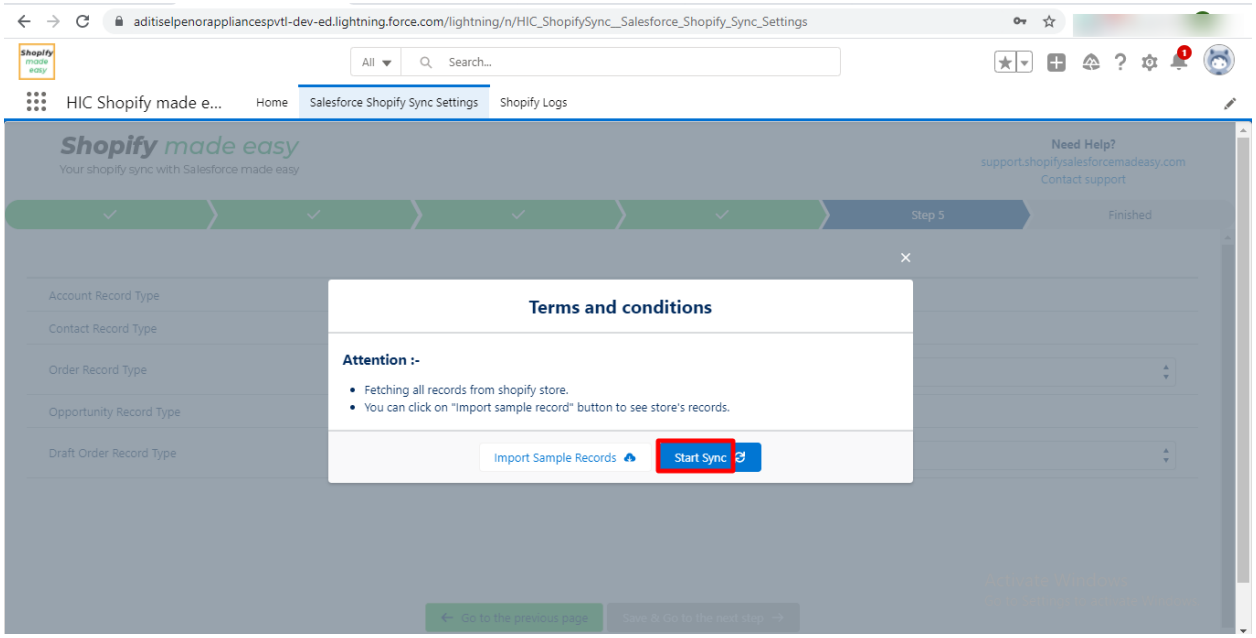


Figure 48

Final step

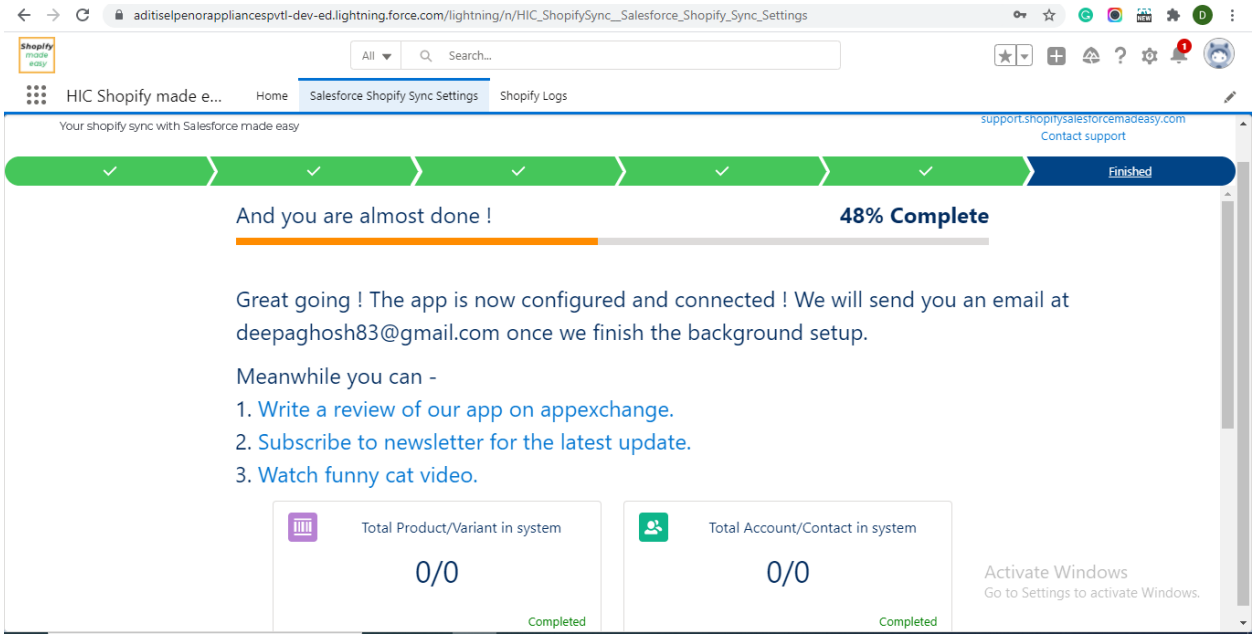
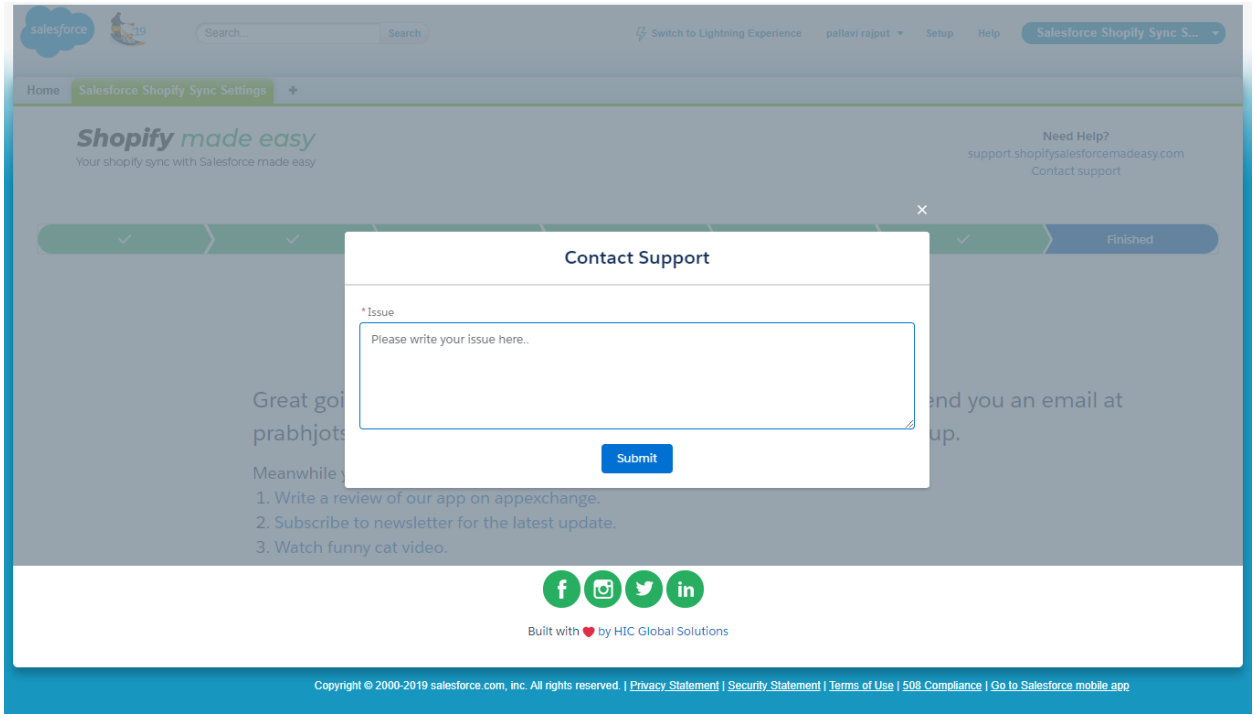


Figure 49

6. Support

For further assistance or installation-related queries, click on Contact Support to the top right of the page to Submit an issue like in Figure 50

Or reach out to us at support.shopifysalesforcemadeasy.com.


Search...
Search
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pallavi rajput
Setup
Help
Salesforce Shopify Sync S...
Home
Salesforce Shopify Sync Settings
Shopify made easy
Your shopify sync with Salesforce made easy
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Finished
Contact Support
* Issue
Please write your issue here..
Submit
Great goi
prabhjots
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Figure 50