Syncify - User Guide

Introduction:

This guide offers a professional and user-friendly walkthrough for installing and configuring the Syncify App in Salesforce. By following these steps, you can seamlessly integrate Shopify data with Salesforce, ensuring an efficient and hassle-free setup process.

Step 1: Install the Syncify App

1. **Access AppExchange:**

   - Log in to your Salesforce instance.
   - Navigate to the **AppExchange** from the Setup Page.
   - In the AppExchange, use the search bar to search for "**Syncify**".

2. **Install the App:**

   - Click on the app named "**Syncify"**. Click on the button **Get It Now**
   - Choose the appropriate Salesforce environment (either **Production** or **Sandbox**), depending on where you want to install the app.
   - Follow the installation prompts, which may include:
     - Agreeing to the terms and conditions.
     - Selecting who should have access to the app (**Admin Only**, **All Users**, or **Specific Profiles**).
     - Verifying the security review of the app.
   - Click **Install** to complete the process.

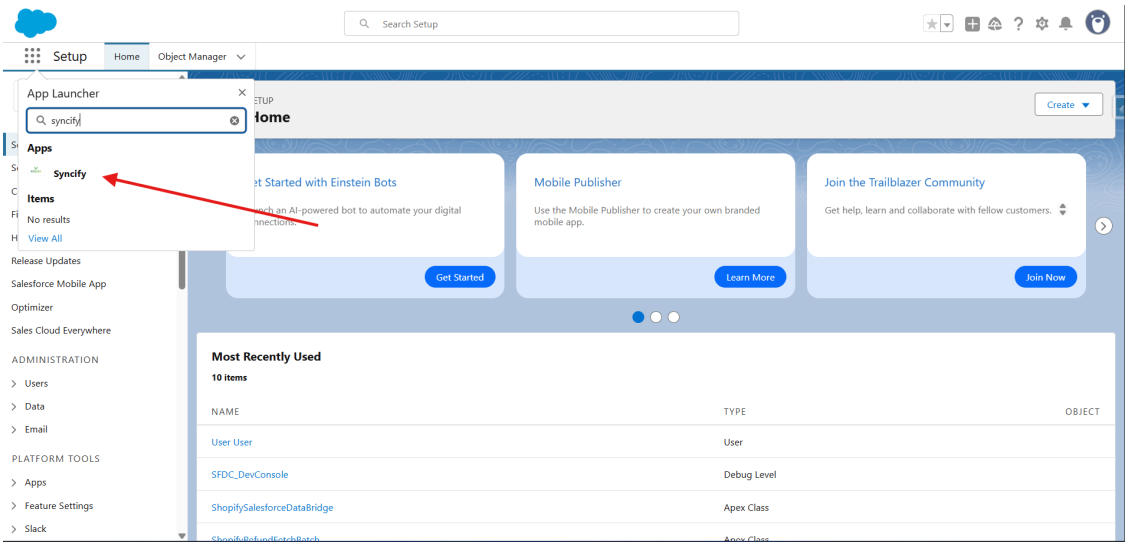
3. **Verify Installation:**

   - After the installation completes, navigate to **Setup > Installed Packages** to confirm that **Syncify** is listed as an installed package.

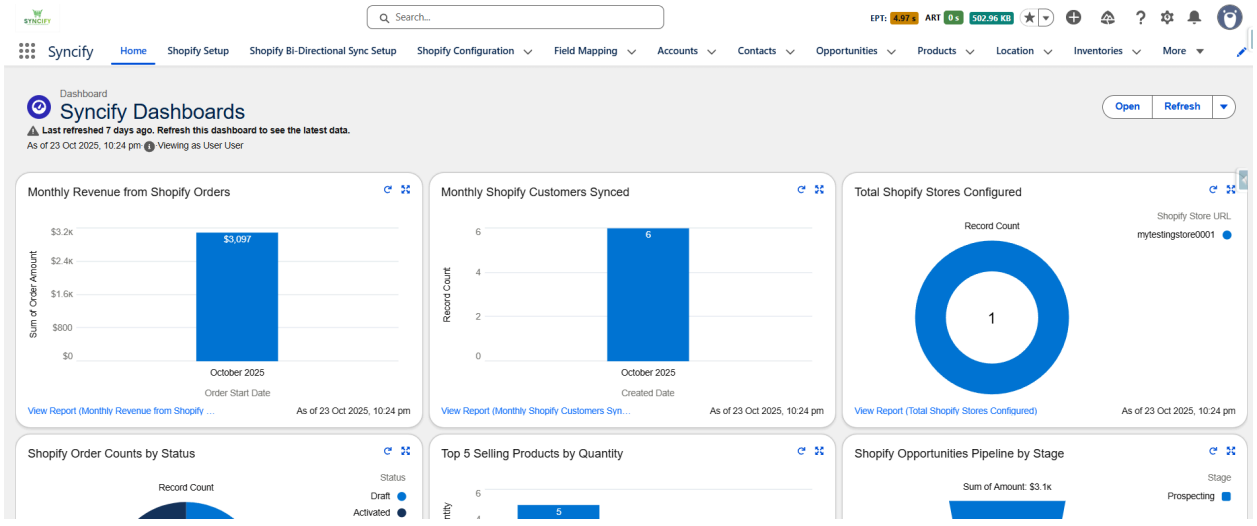
Step 2: Access the Syncify App

1. Search in App Launcher:

- Click the **App Launcher** and search "**Syncify**" in the search box.



Home Tab:



The Syncify Home tab provides a user-friendly dashboard that gives you an at-a-glance view of your Shopify store's performance. This centralised hub displays your most important metrics without requiring you to navigate through multiple screens.

The Home tab shows your critical business metrics in simple visual formats. For example:

- Track your monthly revenue trends
- See how many customers are being synchronised with your system
- Monitor your store configuration status

⚠️ Important Note: Initial Sync Required:

Until the **Shopify Initial Sync** is completed:

- The **Home tab dashboards and reports will not be visible**.
- This is because the system depends on synced data to populate the visualisations.

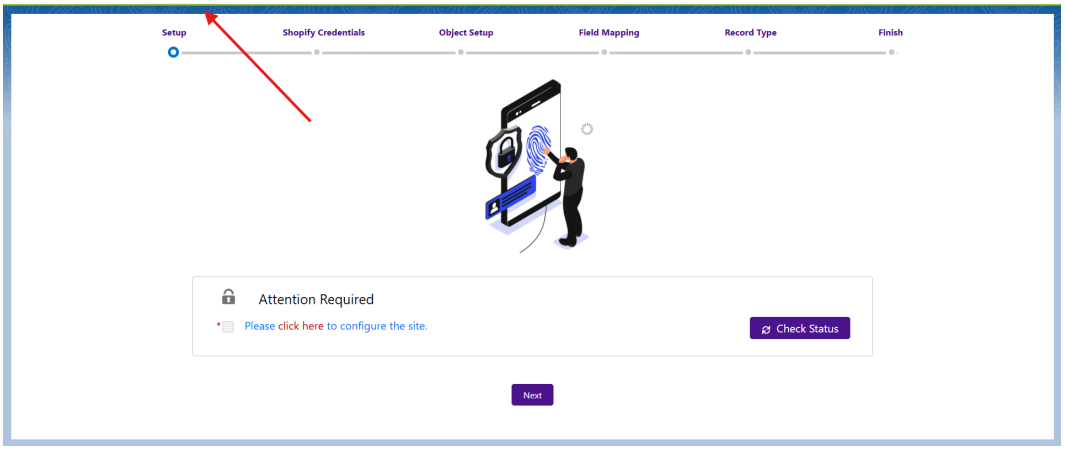
To unlock these insights, make sure to:

1. Complete the **Shopify Setup**.
2. Run the **Initial Sync** process.

Step 3: Post-Installation Configuration

1. **Connect Shopify to Salesforce:**

    - Navigate to the **Shopify Setup** tab on the **Syncify** App.

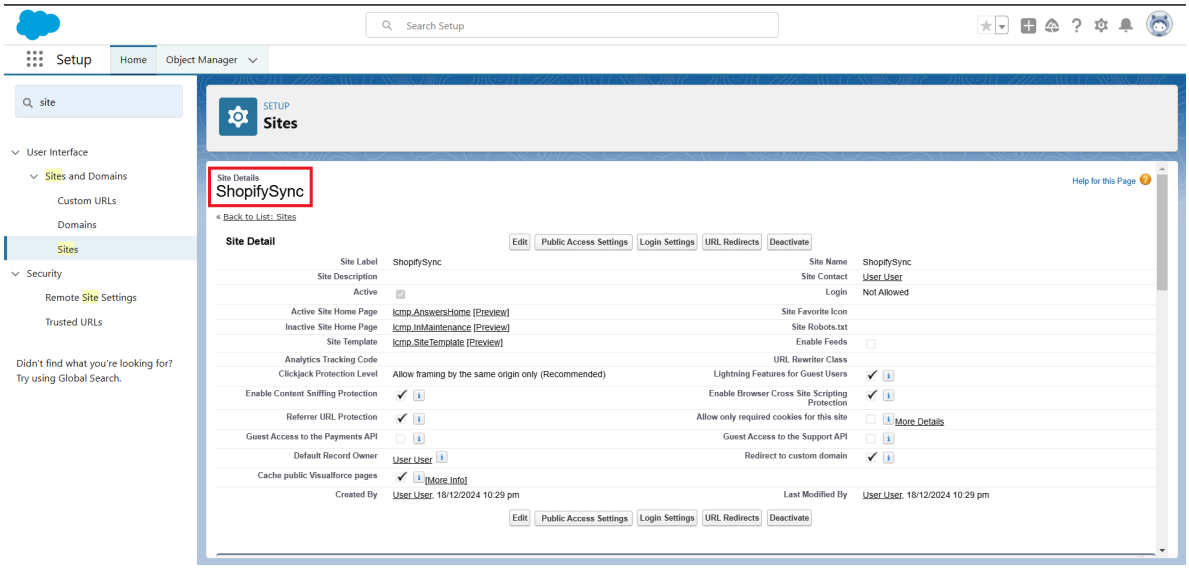


2. Navigate to the Site Configuration:

- In the Shopify Setup Page under the Setup section, find the message **"Please click here to configure the site"**.
- Click the click here to get directed to the Site configuration page.

3. Create or Activate a Site for Syncify:

- Click on the **New Site** button to create one.
- Follow the prompts to configure the site. Provide the URLPathPrefix as **'shopify'** in small letters and make sure the new site is **Active**.
- You can check this by going to **Setup > Sites** and ensuring the status of the site is "**Active**."



Step 4: Assign Permission Sets

1. Locate Permission Sets:

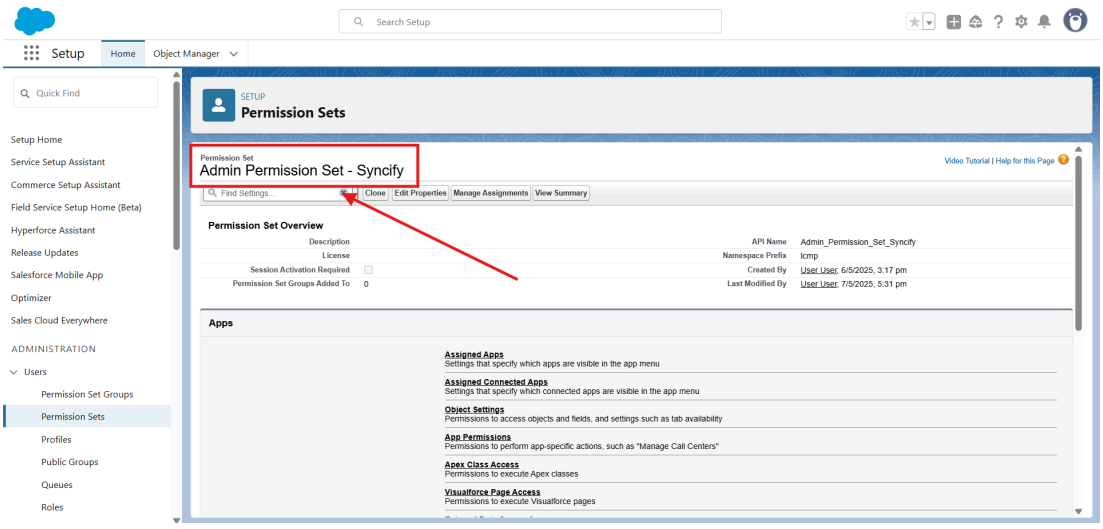
- Go to **Setup** in Salesforce. In the Quick Find box, type **Permission Sets** and click on **Permission Sets**.

2. Assign Permission Set:

- In the list of permission sets, search for the one related to Syncify (e.g., **Admin Permission Set - Syncify**, **Non-Admin Permission Set - Syncify**).
- Click the name of the desired permission set.
- Click **Manage Assignments**, then click **Add Assignments**.
- Select the users who need access to the Syncify app by checking the box next to their names.
- Click **Assign**, and confirm the assignment when prompted.

3. Verify Permissions:

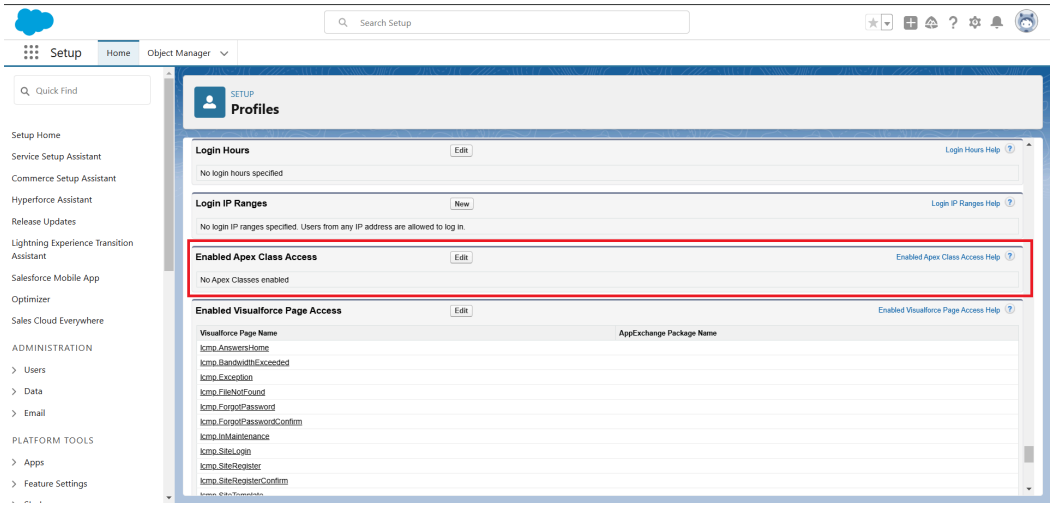
- Confirm that the assigned users have the correct permissions - **“Admin Permission Set”** by navigating to their profiles and ensuring they have access to the Syncify features.
- You can also verify by logging in as one of the assigned users and checking the permission set assigned to their respective profile.



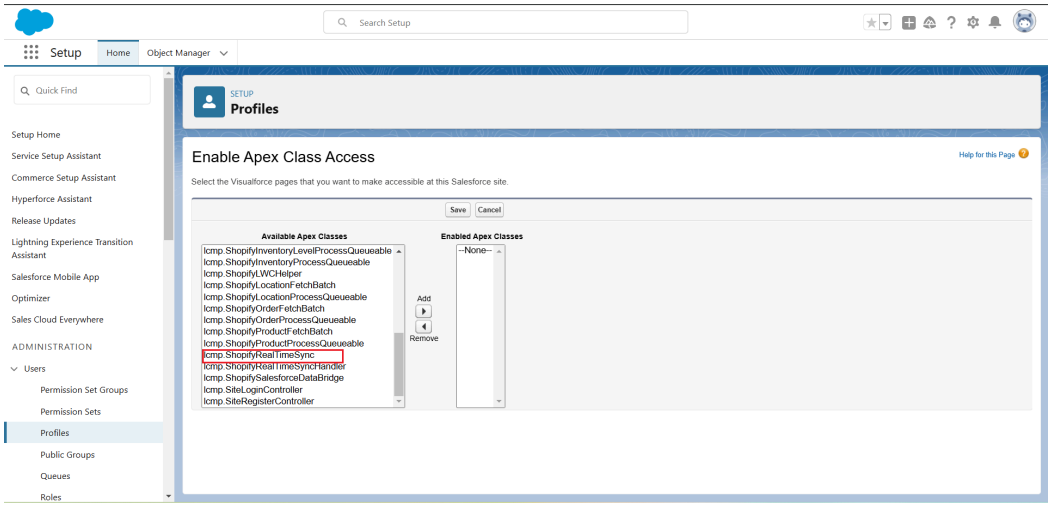
- Once the permission set has been assigned, you can also verify the app by going to the **App Launcher** and searching for **Syncify**.

4. Grant Public Apex Access:

- After configuring the site, scroll down to the **Public Access Settings** section on the site page.

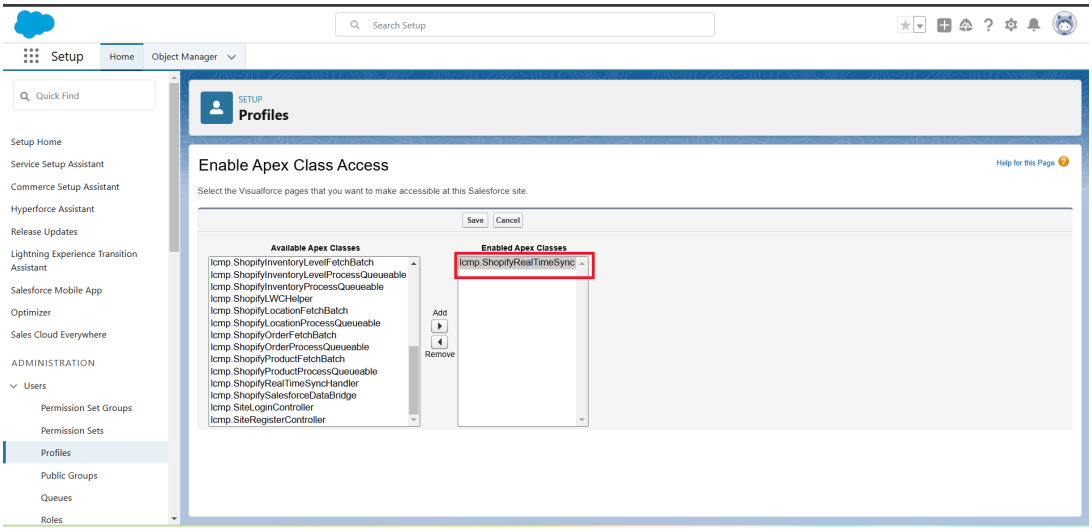


- Click **Public Access Settings**.
- Scroll down to the **Enabled Apex Class Access** section.
- Click on Edit and add the Apex class named **“lcmp.ShopifyRealTimeSync”**.
- Click **Add** to move them to the **Enabled Apex Class Access** box.
- Click **Save**.

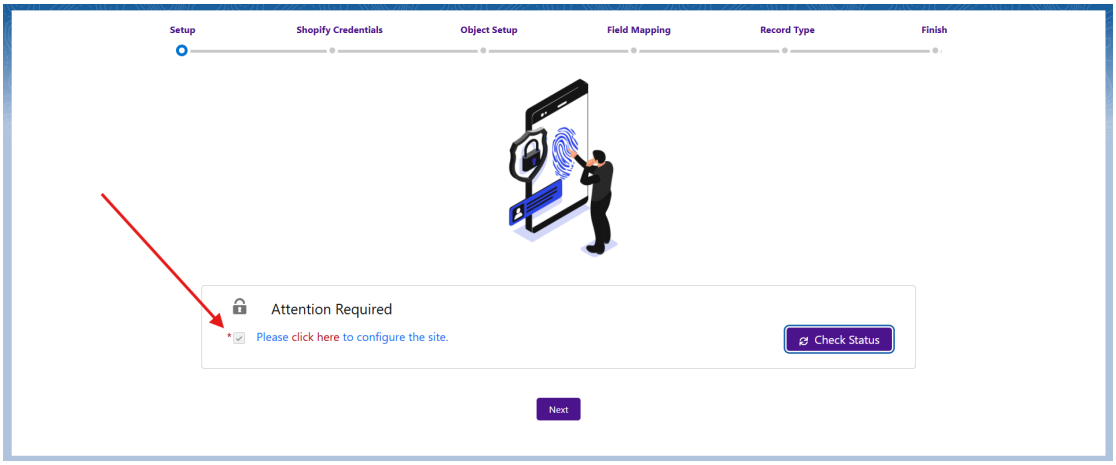


5. Finish the Setup

- Navigate back to the app page and click on the 🔄Check Status button under the Attention Required section.
- The checkbox should be enabled.



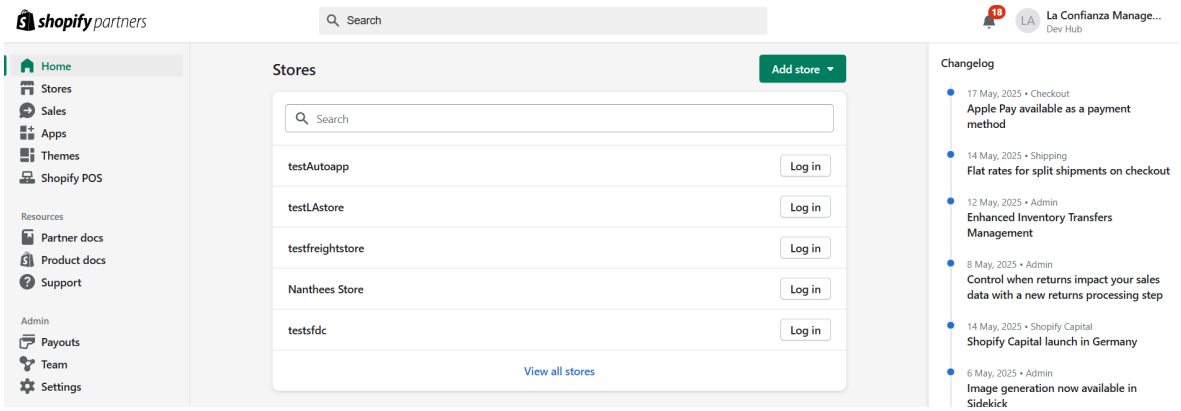
- Click on the Next button.
- The Shopify Credentials Page should be open.



Shopify Admin API Setup:

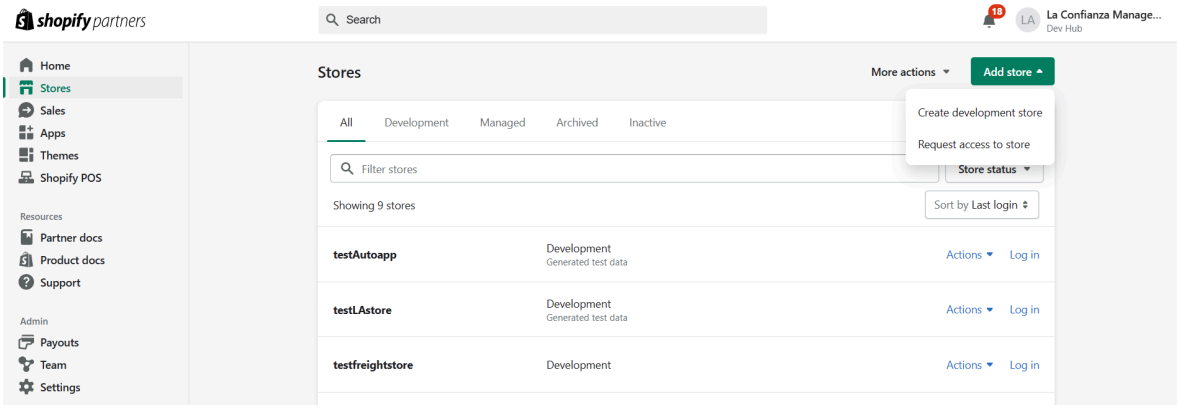
1. Create a Shopify Partner Account

- Go to https://partners.shopify.com
- Sign up or log in to the Shopify Partner Dashboard.



2. Create Development Store

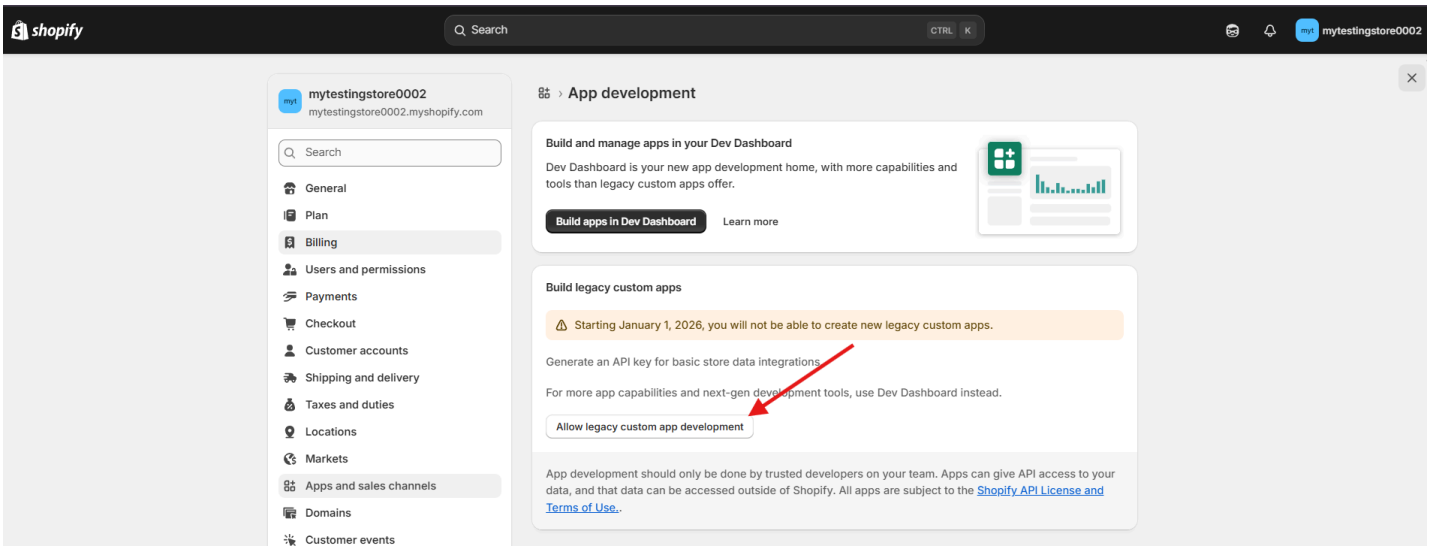
- In the Partner Dashboard, navigate to Stores > Add store > Development store.



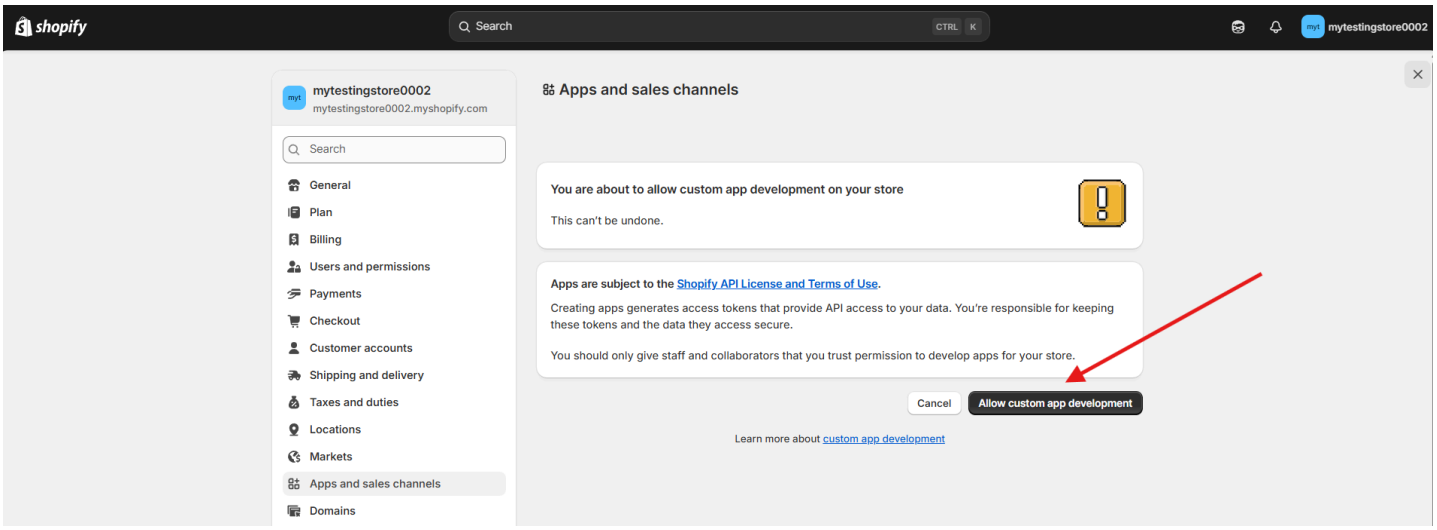
- Enter store details and save.
- Access your store at: “https://<store-name>.myshopify.com/admin”

3. Create a Custom App

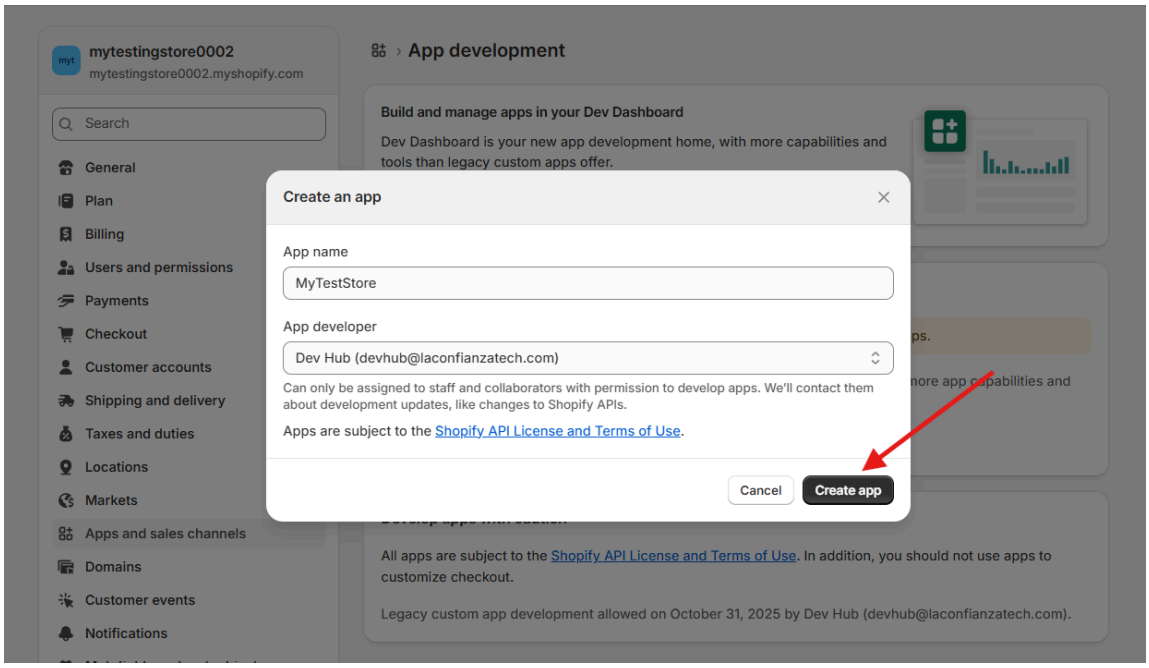
- From your store admin, go to **Settings** > **App and sales channel settings**. Click Allow legacy custom app development.



- Click **Allow custom app development.**



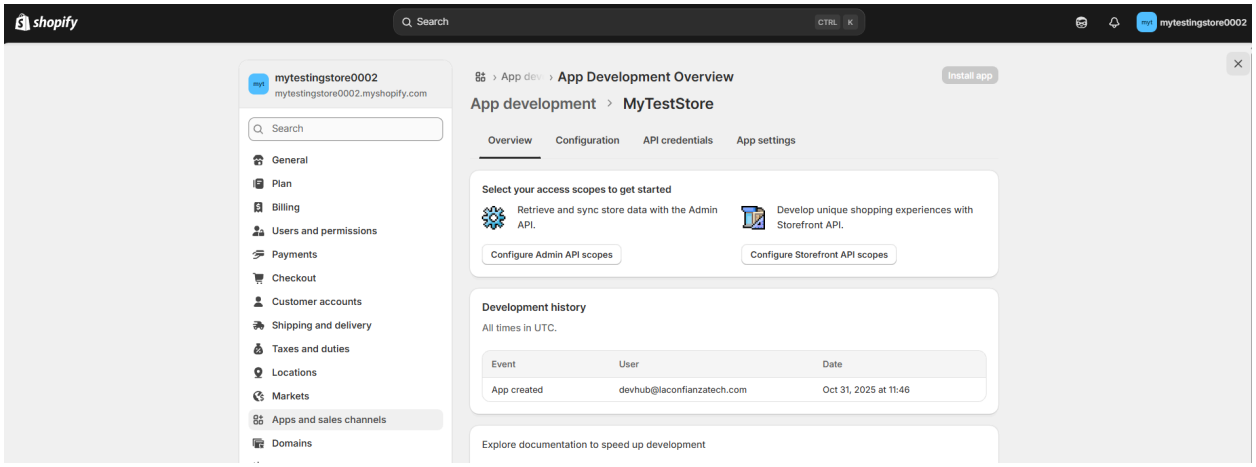
- Click **Develop apps** > **Create an app**.



- Enter an **App Name** and Click “Create App”.

4. Configure Admin API Scopes

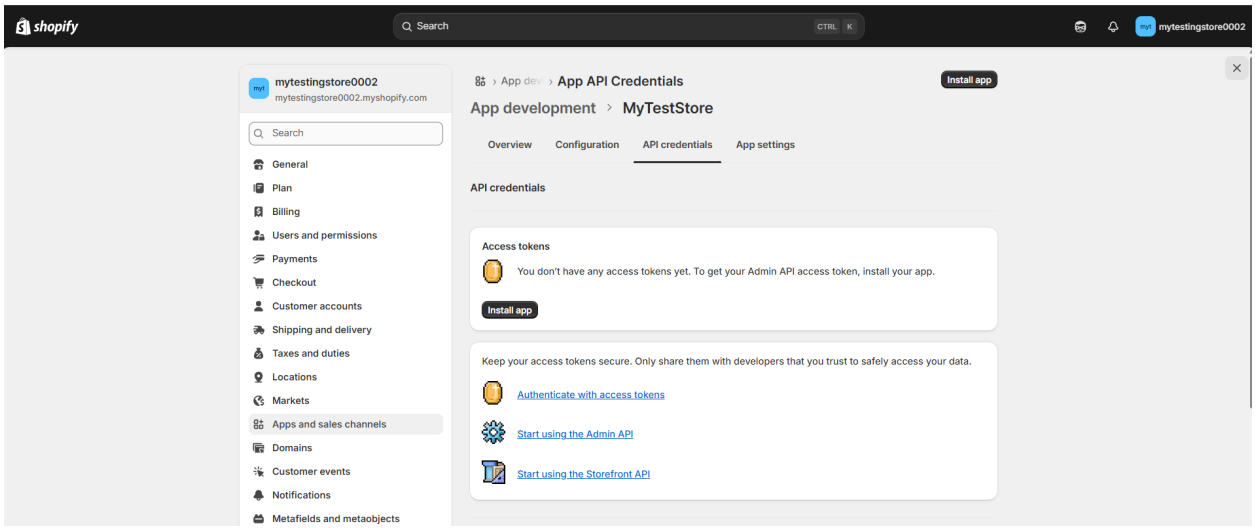
- Go to the **Configuration** tab of the app.



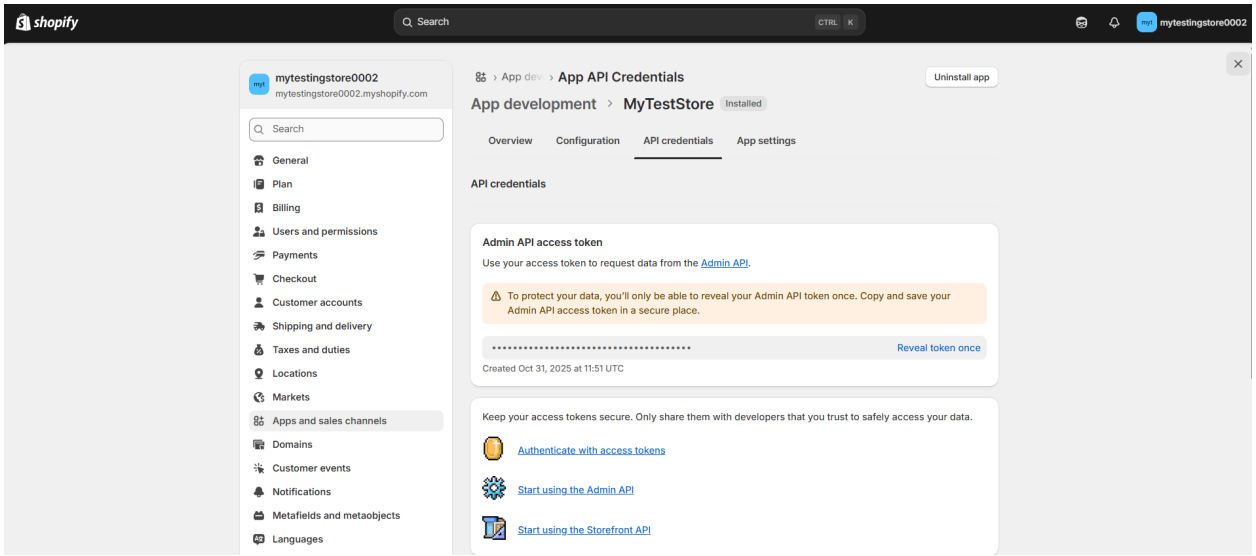
- Select scopes based on your needs (e.g., read_products, write_orders, read_customers).
- Click **Save**.

5. Get Admin API Token

- Install the created app in your store to get the access token.



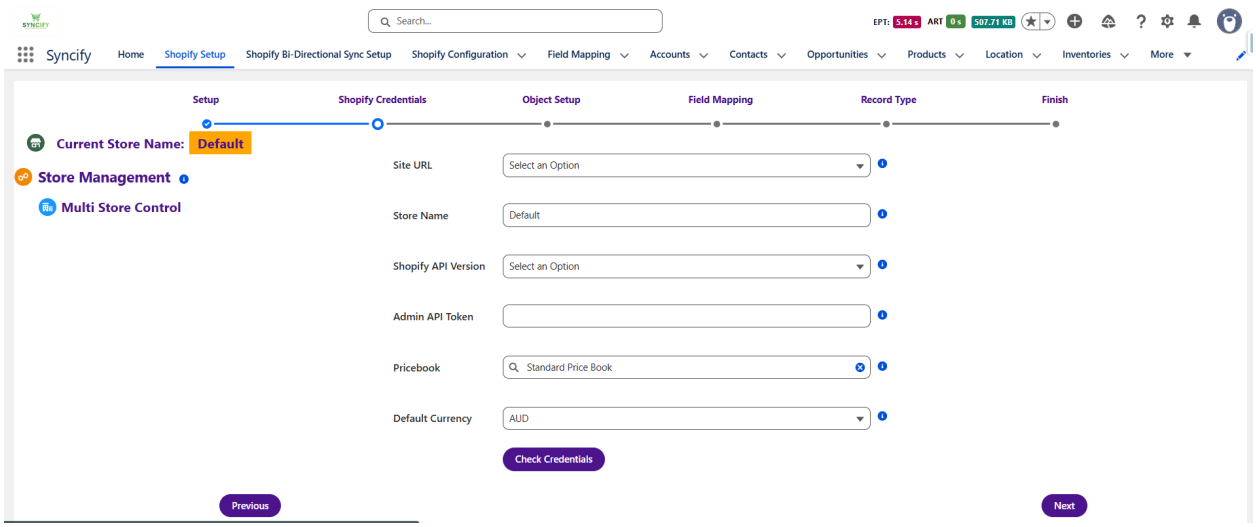
- Click the **Reveal token once** under **Admin API access token**.



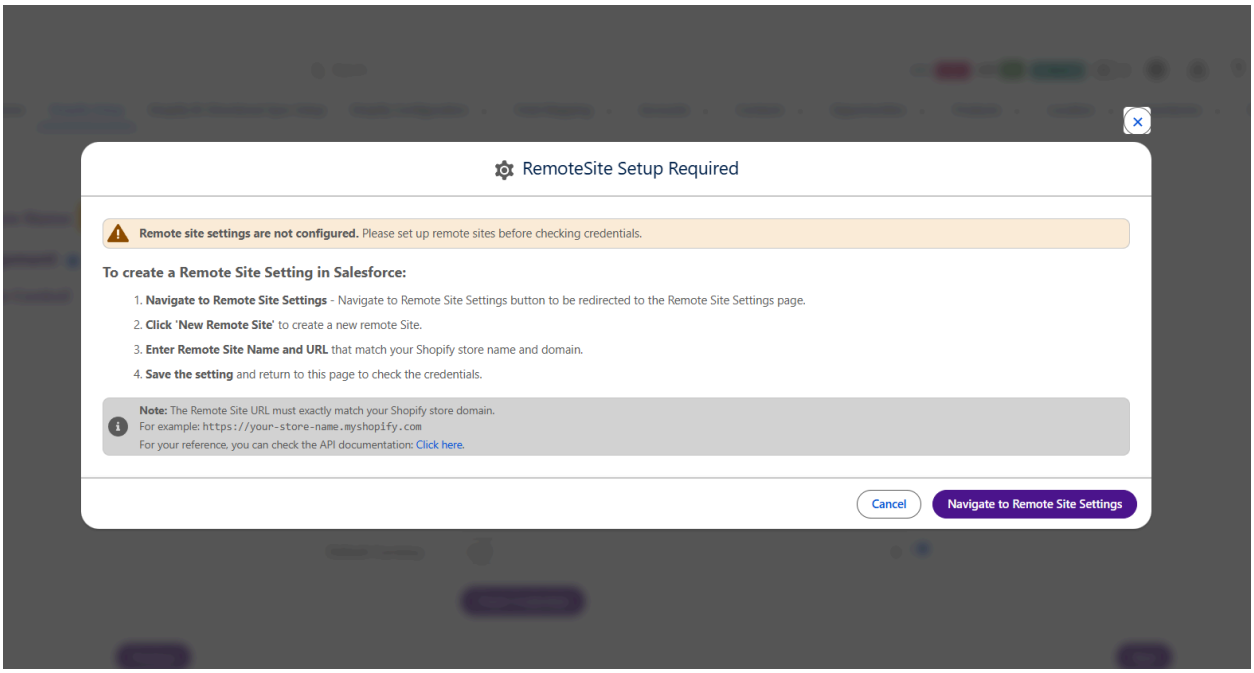
- Copy the token securely — **you won't be able to see it again**.

- Copy and securely store:
    - **Admin API access token**
    - **API key**
    - **API secret key**

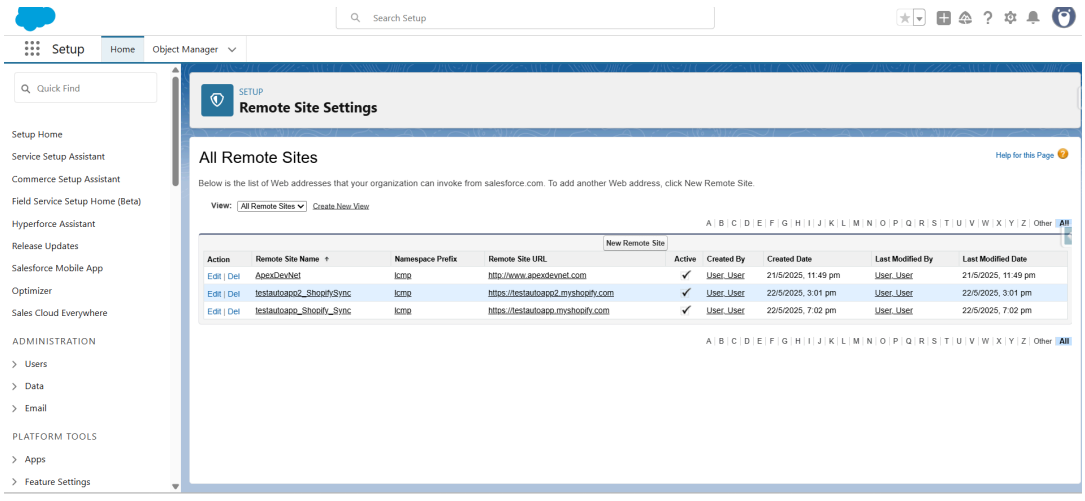
- Fill the necessary fields:
    - **Select a Site URL:** https://appenterprise-9222-dev-ed.scratch.my.salesforce-sites.com/shopify
    - **Store Name:**<Your Store Name> *Eg: testautoapp*
    - **Shopify API version:**<Your Store API version> *Eg: 2024-04*
    - **Admin API access Token:**<Your API access token> *Eg: shpat_cc2d1xxxxxxxxxx*
    - **Select a Pricebook:** Standard Pricebook
    - **Default Currency:** AUD (based on your Salesforce Org currency)



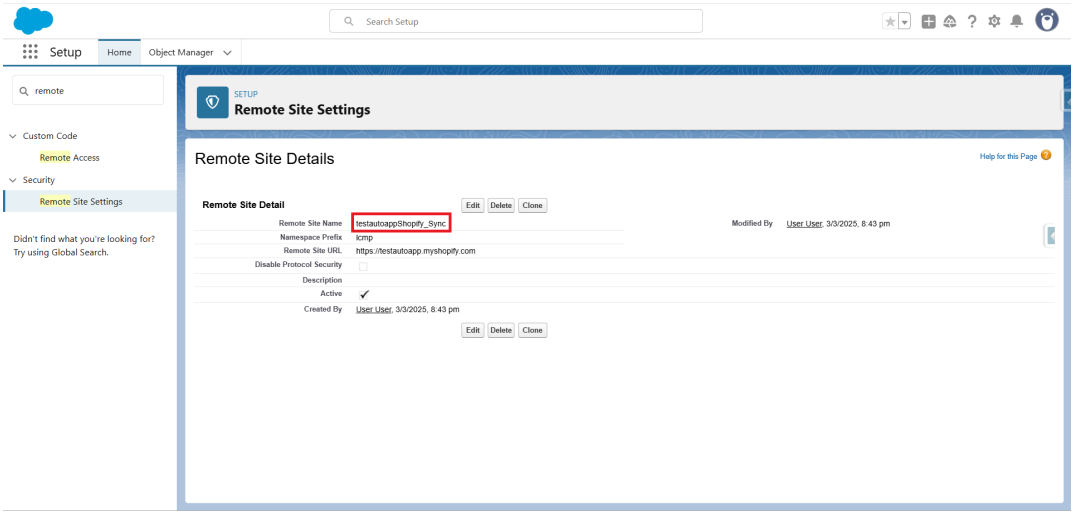
- Click on the Check Credentials button.
- If a Remote Site already exists for the store, the Configuration record will be created automatically. If not, a pop-up dialog box will appear prompting you to create a new Remote Site Setting.



- After a click on the Check Credentials button, a pop-up dialog box appears prompting you to create a New Remote Site Setting. The dialog also provides step-by-step instructions to help you complete the setup.
- Click the **"Navigate to Remote Site Settings"** button to be redirected to Salesforce's Remote Site Settings page.



- **Click 'New Remote Site' -** Once on the Remote Site Settings page, click the **“New Remote Site”** button to create a new entry.



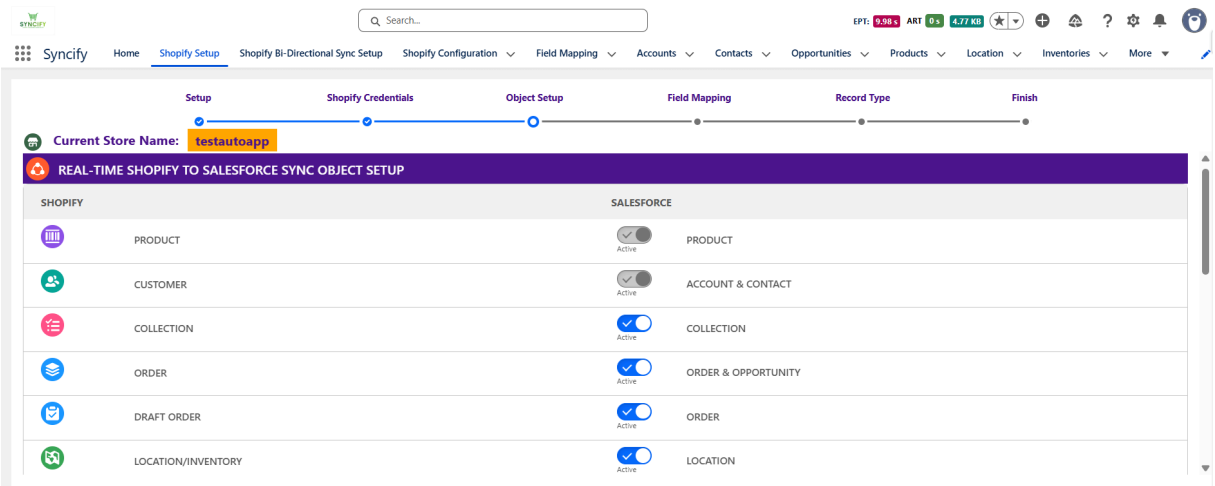
- **Enter Required Information**

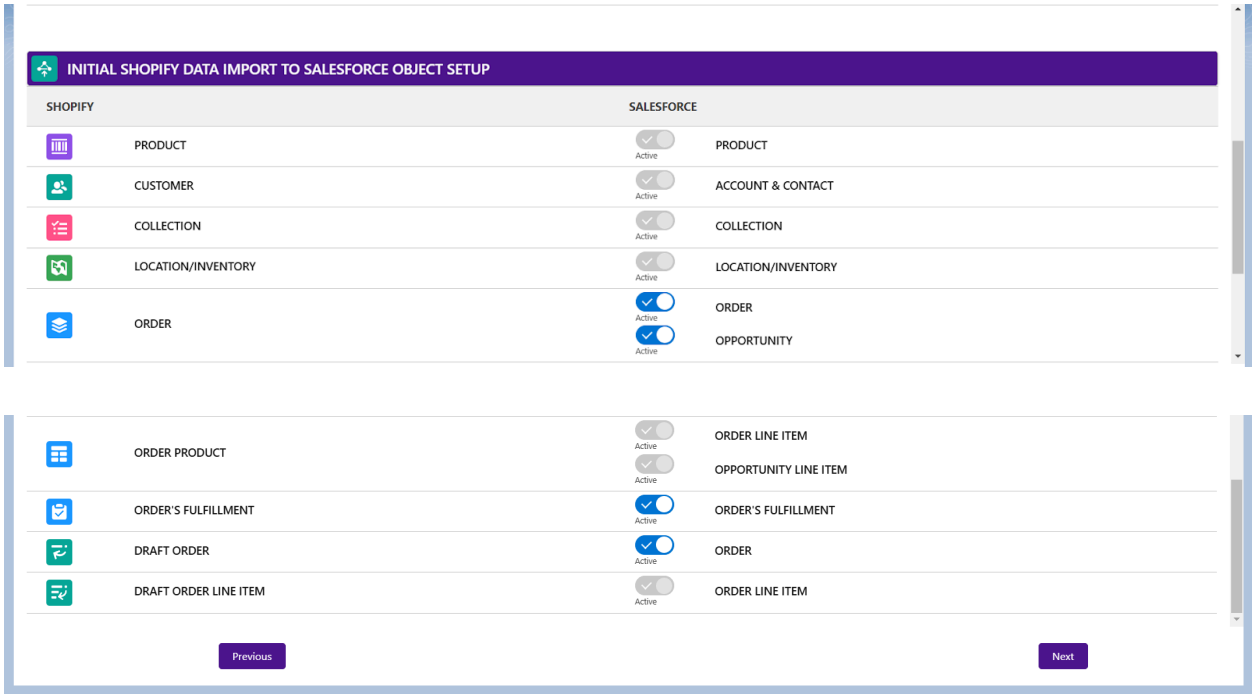
  Provide a **Remote Site Name** and **URL** that matches your Shopify store (e.g., https://your-store-name.myshopify.com).

- **Save the Setting**

  Save your changes and return to this screen to re-check the credentials.

- Get back to the **Shopify Credentials** page.
- Verify the details and click on the Check Credentials button again.
- The Details should be verified successfully(if the credentials are valid)
- Now the Shopify Configuration has been done successfully.
- Click on the Next button, the **Object Setup** page should appear.
    - There should exist two sections:
        - REAL-TIME SHOPIFY TO SALESFORCE SYNC OBJECT SETUP
        - INITIAL SHOPIFY DATA IMPORT TO SALESFORCE OBJECT SETUP
- Make sure all the object toggles are in the **active** state.





- Click on the Next button, the **Field Mapping** page should appear.

Step 5: Objects & Fields Setup

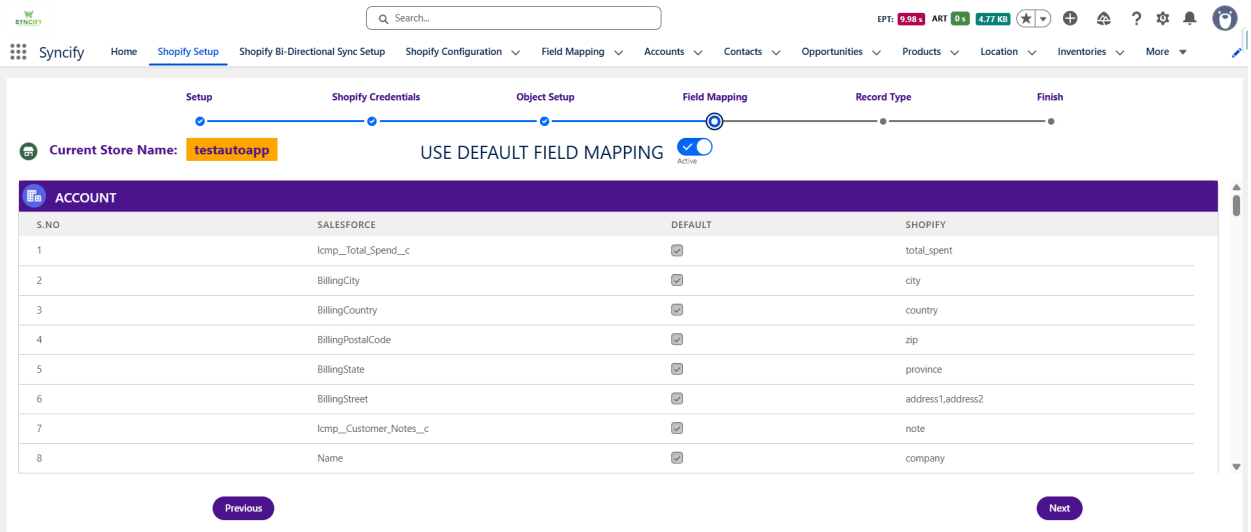
1. Set up the Required Fields for specific Objects:

- On the **Field Mapping** Page, make sure all the fields are visible for the enabled & active objects.
- Once all the objects are in an active state on the Object Setup page, the following objects should be available for Field Mapping configuration:
    - **Account**
    - **Contact**
    - **Product**
    - **Variant**
    - **Order**
    - **Order Product**
    - **Draft Order**
    - **Draft Order Product**
    - **Opportunity**
    - **Opportunity Product**
- You can use the default field mapping, or else you can customise your field section after making the **USE DEFAULT FIELD MAPPING** toggle **inactive**
- The following options are available :
    - **ADD** new fields
    - **EDIT** existing fields
    - **DELETE** the pre-defined fields.

Step 6: Shopify Initial Sync Process

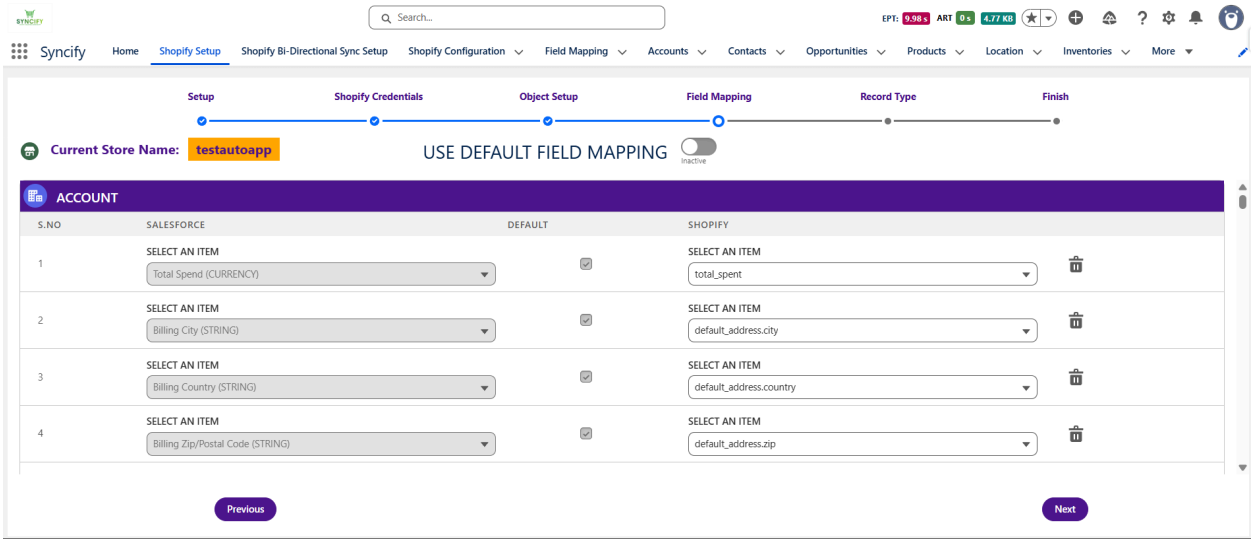
1. Configure the fields:

- On the **Field Mapping Page**, you have two options for setting up your fields:
    - **Default Field Mapping:**
        i. Everything is pre-defined.
        ii. Review the mappings as per the active Objects and proceed by clicking **Next**.
    - **Custom Field Mapping:**
        i. Deactivate the **USE DEFAULT FIELD MAPPING** toggle.
        ii. Scroll down and add new fields by clicking the ➕ button for the



required objects.
iii. Remove any existing fields by clicking the 🗑️ button on the objects you don't need.

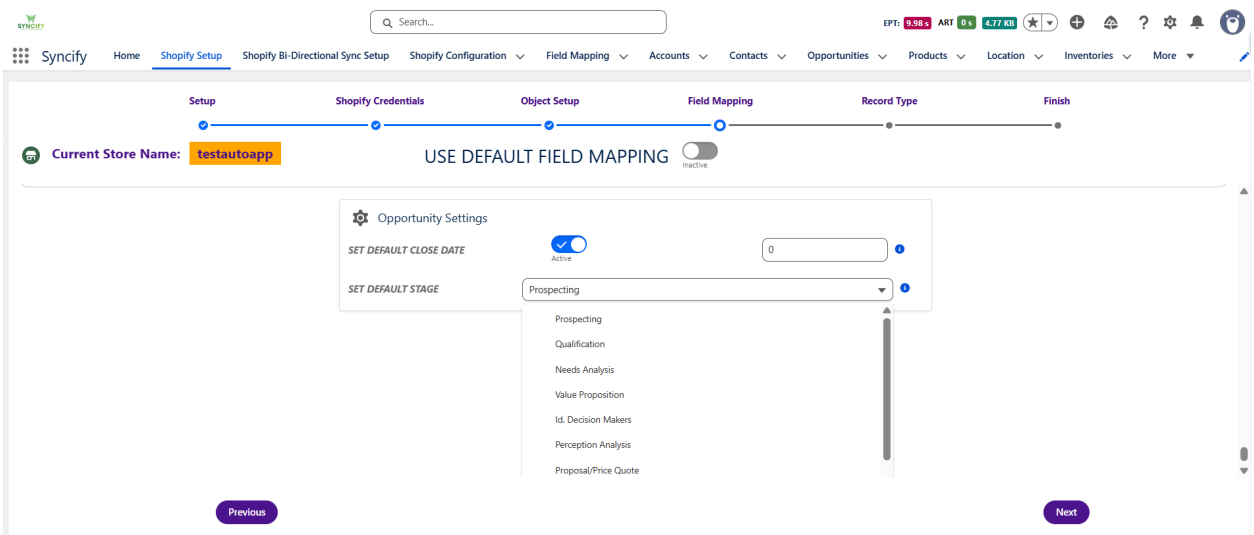
- Once the **USE DEFAULT FIELD MAPPING** is deactivated, both the **Salesforce** & **Shopify** fields will be editable.
- Scroll down to the last field of a particular object.
- You can **add** new fields by clicking the ➕ icon.



- You can **remove** fields by clicking the 🗑️ icon.

2. Configure the Opportunity Settings:

- If you are using the Custom Field Mapping(by making the **USE DEFAULT FIELD MAPPING** toggle **inactive**).

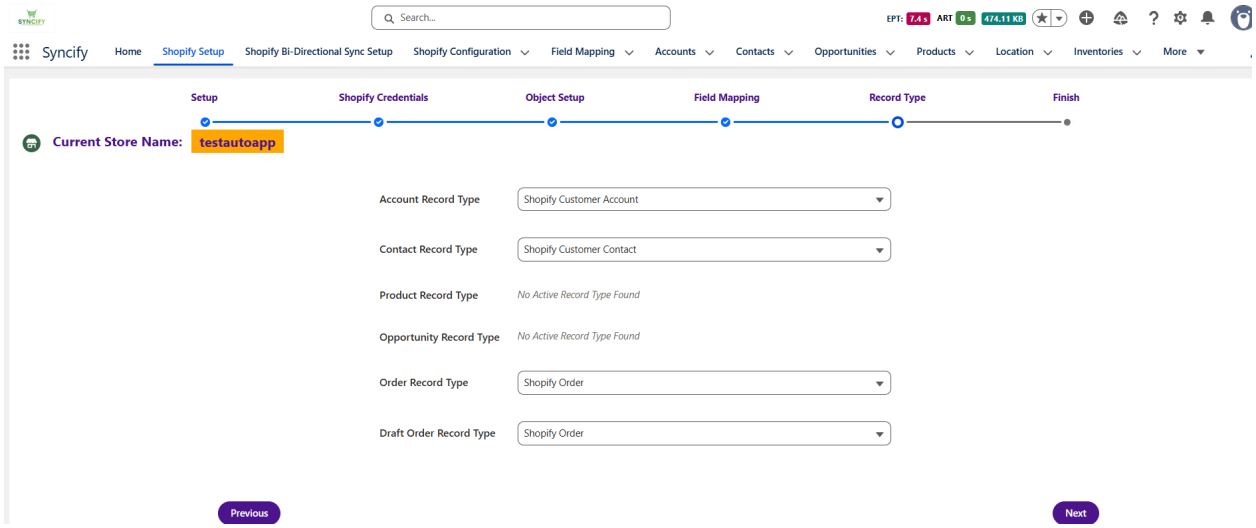


- You can configure the⚙️**Opportunity Settings**(optional).
- Scroll down to the bottom of the Field Mapping Page, you can find the ⚙️**Opportunity Settings**.
- Toggle on the **GIVE DEFAULT CLOSE DATE**.

- Specify the **No of Days**. (The value would add up to the Close Date in the Opportunity record)
- Specify the **DEFAULT STAGE** (The value would appear in the StageName field in the Opportunity record)
- Click on the Next button, the **Record Type** page will appear.

3. Specify the Record Types:

- Initially, there will be no **Record Types** available unless a **Record Type** has been specifically created for the object.



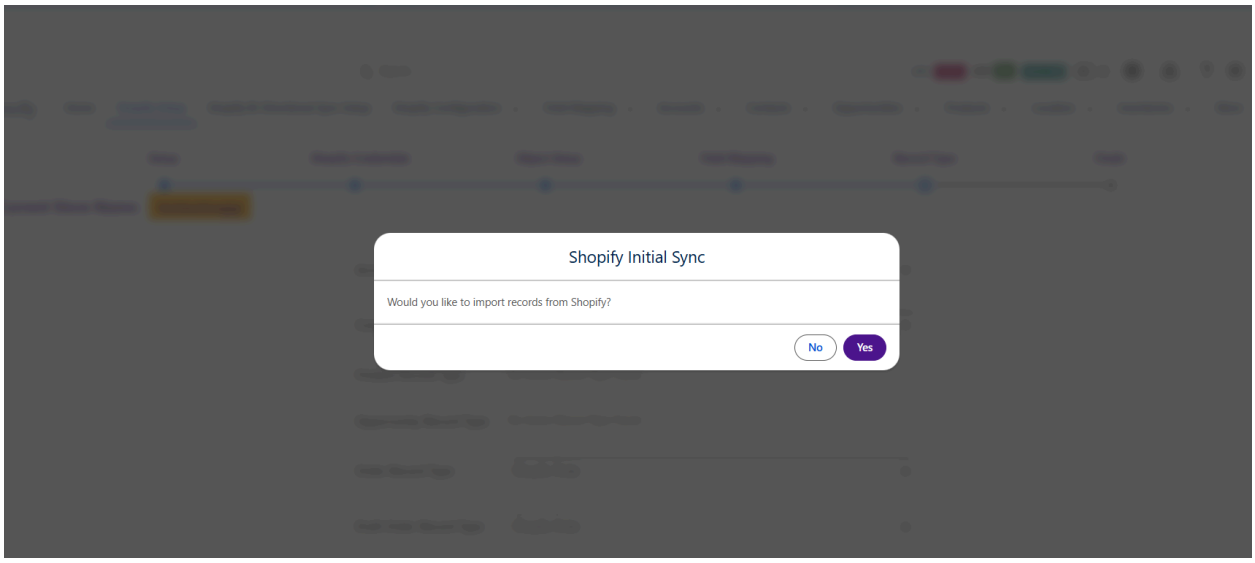
- Create Record Types:-**(optional)**
    - Go to **Setup** in Salesforce.
    - In the **Quick Find** box, type **Object Manager** and click on **Object Manager**.
    - Select the object you want to create a Record Type for (e.g., **Account**, **Lead**, **Opportunity**).
    - In the object's settings, scroll down to the **Record Types** section and click on **Record Types**.
    - Click the **New** button to create a new Record Type.
    - Follow the prompts, provide the necessary details (such as **Record Type Label**, **Name**, **Sales Process** if applicable), and save.
- Click on the Next button.

Step 7: Initial Sync Process

1. Initiate the batch to import records in Salesforce from Shopify

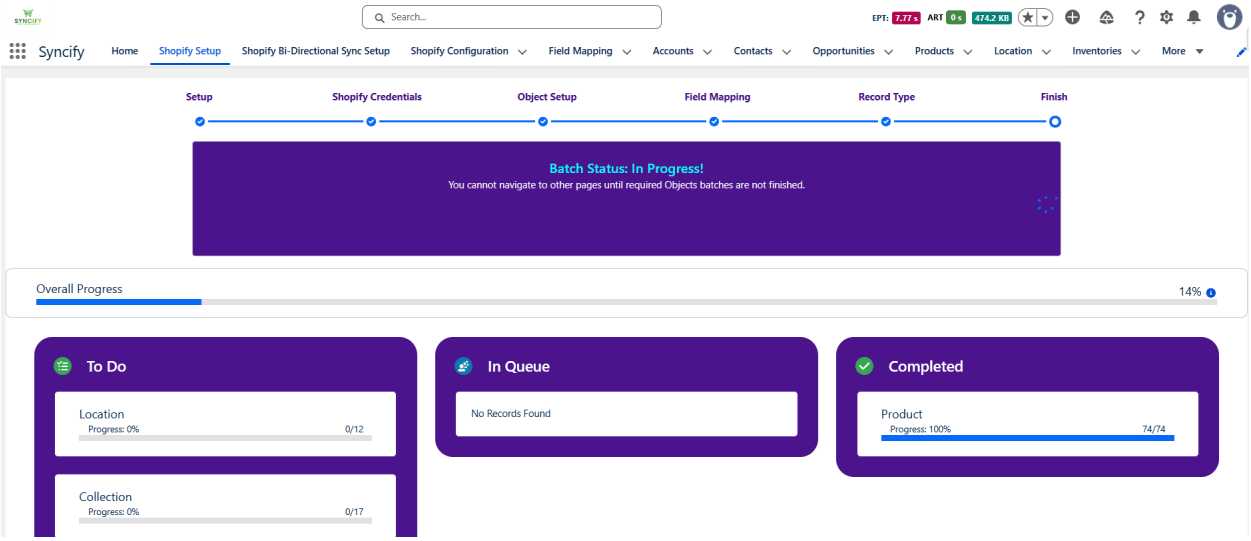
- Once the Record Types have been selected, click on the Next button.
- A confirmation pop-up will appear, asking if you want to proceed with the record import.

- Click on the Next button to proceed



- After confirmation, the **Finish** page will open, displaying three layers for the data import process:
    - **To-Do:**
        - Lists the objects queued for data import.
    - **In Queue:**
        - Shows the current progress of objects being imported.
    - **Completed:**
        - Displays the objects for which the data import has been completed.

- Once the batch is completed to **100%**, it should navigate to the **Shopify Credentials** page, only after importing some of the child records or dependent



records, which have been queued further.

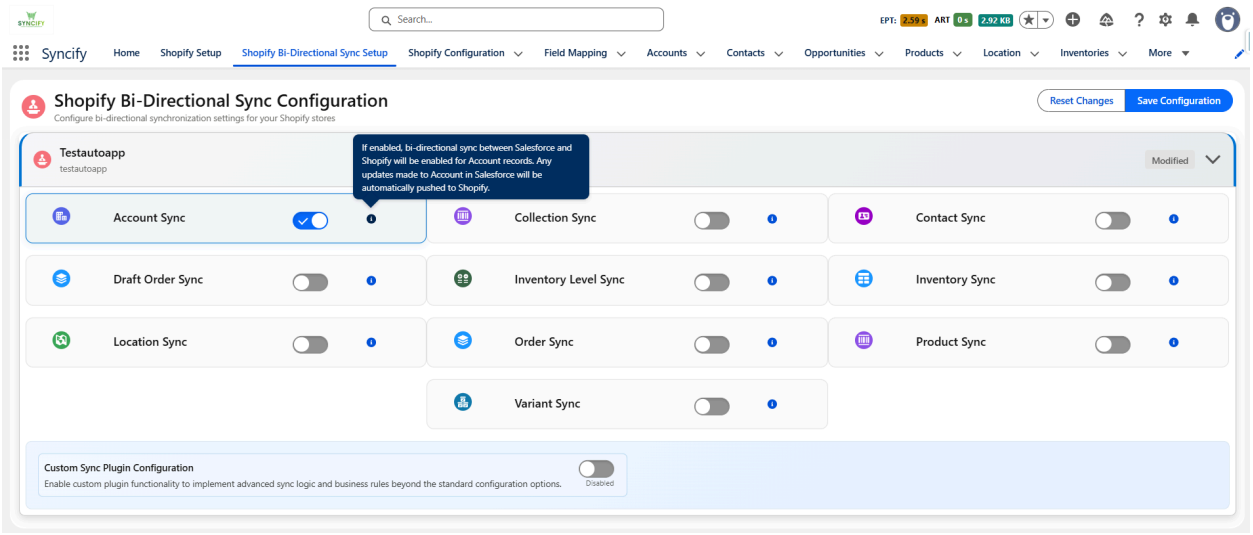
2. Real-Time synchronisation from Shopify to Salesforce

- The **Object Setup** & **Field Mapping** configuration is common for the Real-Time synchronisation.
- Once any records get created in the configured store, any of the following events(**create**/**update**/**delete**) should trigger out, and a matching record gets created in the **Salesforce** org too.

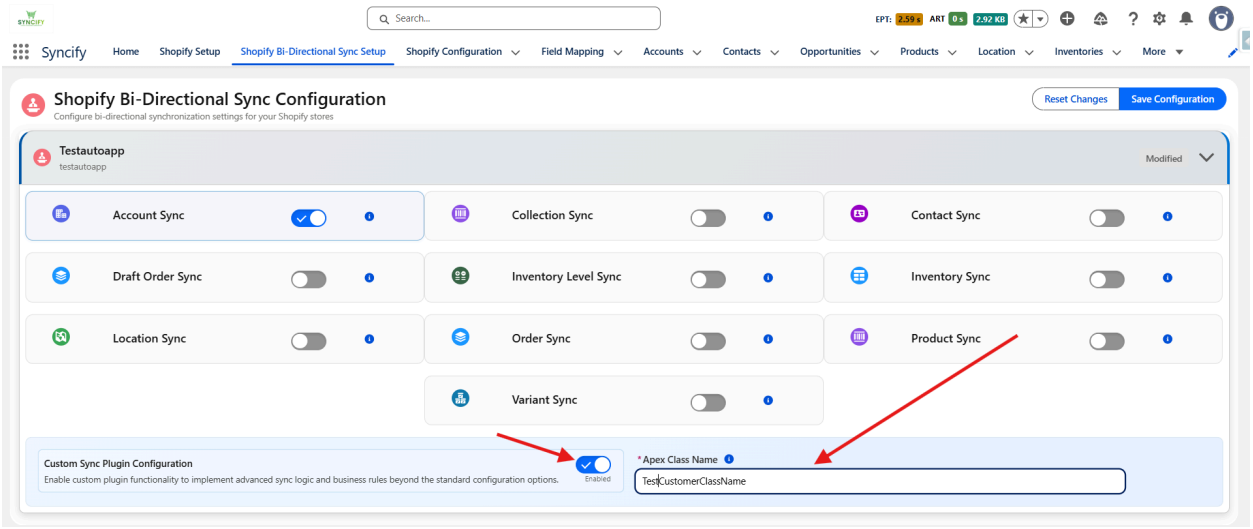
Setup: Bi-Directional Sync

The Bi-Directional Sync feature in Syncify allows seamless two-way data synchronisation between Shopify and Salesforce. Follow these steps to configure the Bi-Directional Sync in Syncify:

1. Navigate to the Shopify Bi-Directional Sync Setup. Go to the Syncify App in Salesforce and open the Shopify Bi-Directional Sync Setup tab.



2. From this page, you can easily control each object's synchronization by enabling or disabling it for all your connected Shopify stores in one place.
3. Create a new Apex class that implements the Icmp.IShopifyInputExtension interface.
4. Define your logic inside the interface methods (for example, modifying field values or applying business rules before syncing).
5. In Salesforce, go to the Shopify Bi-Directional Setup tab.
6. Enable the checkbox "Custom Sync Plugin Configuration."



7. Enter your custom class name (e.g., *TestCustomerClassName*) in the Custom Class Name field and click Save.
8. Once saved, your custom class will automatically be used during synchronisation.

Supported Objects and Fields

Product2 → Product

- Supported Shopify Fields:
  - title
  - tag

Variant__c → Product Variants

- Supported Shopify Fields:
  - price

Inventory__c → Inventory Item

- Supported Shopify Fields:
  - tracked

InventoryLevel__c → Inventory Level

- Supported Shopify Fields:
  - available

Location__c → Location

- Supported Shopify Fields:
  - name

Order → Order

- Supported Shopify Fields:
  - note
  - tags

Account / Contact → Customer

- Supported Shopify Fields:
  - last_name
  - phone
  - note
  - tags

DraftOrder__c → Draft Order

- Supported Shopify Fields:
  - tags

Collection__c → Collection

- **Supported Shopify Fields:**
  - title
  - handle

Conclusion

- You have completed the setup and configuration of the **Syncify App** in Salesforce. With this integration in place, your Salesforce org is now fully connected to your Shopify store, enabling seamless **real-time** and **bidirectional synchronisation** of key business data such as **Products, Customers, and Orders**.
- The Syncify App ensures that updates made in either Shopify or Salesforce are automatically reflected across both platforms, reducing manual effort and maintaining data accuracy.
- With Syncify's intuitive configuration options, flexible field mapping, and real-time sync capabilities, your business can make faster, data-driven decisions while maintaining consistency between Shopify and Salesforce.