

SMART-BUILDING ACCESS TECHNOLOGY COMPANY · DEALER CHANNEL

Shopify-Salesforce integration moved from Mesa to MuleSoft, then partner provisioning automated

1

codebase, with separate Anypoint endpoints for production and sandbox

2,200

partners and customers loaded from Salesforce into the B2B store

First

ACH payments for B2B partners; first partner orders through the new flow, Oct 2026

THE PROBLEM

Orders flowed from Shopify to Salesforce through Mesa, a workflow tool inherited from a prior developer. The logic was split across several flows that created a record, then updated it repeatedly, and it needed custom meta objects to pass references between flows. The company already licensed MuleSoft. Shopify has no sandbox, so there was no safe way to test changes against a live store.

WHAT WE DID

We rebuilt the order integration on MuleSoft: one codebase, with separate Anypoint endpoints for production and the Salesforce full sandbox, selected by a test flag on the Shopify order. The opportunity payload is assembled once in DataWeave, so the record is created complete rather than updated in stages, and the legacy meta objects were removed. We handed the integration to the client's internal MuleSoft developer with the design documented. In 2026 we built the reverse path for the new B2B partner store: a dealer-status change in Salesforce sends an outbound message that triggers MuleSoft to create the partner company, location and admin contact in Shopify, carrying tax exemption, payment terms, partner tier and catalog access. We also replaced warranty record types with a single sale-type field, enabled ACH for partner orders, and loaded 2,200 partners and customers from Salesforce.

RESULTS

- 1 Order integration rebuilt on MuleSoft with a single codebase for production and sandbox, and owned by the client's team.
- 2 Partner provisioning automated end to end from a Salesforce field change; first partner orders through the new flow in October 2026.
- 3 ACH payments enabled for B2B partners for the first time.
- 4 Shopify checkout extension rebuilt for Shopify's current framework with a regression test suite.

CLIENT

Smart-building access technology company selling through installers and dealers

OUR ROLE

Integration architecture and build; Shopify B2B partner store; knowledge transfer to the client's MuleSoft developer

SYSTEMS

Salesforce, Shopify Plus, Mesa, MuleSoft Anypoint, Salesforce Flow

TIMELINE

May 2025 to present

A dealer-status change in Salesforce creates the partner company, location and admin contact in Shopify, with tax, terms, tier and catalog access.