



HIC GLOBAL SOLUTIONS
Your CRM Success Partners

Shopify *made easy*

Your shopify sync with Salesforce made easy

USER MANUAL



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HIC Global Solutions, 2023
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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. Enable Order Object:** Users must enable the Order Object on their Salesforce org to continue with the installation of the package.

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.

3.2 Finding Shopify Made Easy on AppExchange

- Visit Salesforce Appexchange (<https://appexchange.salesforce.com>).
- 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.

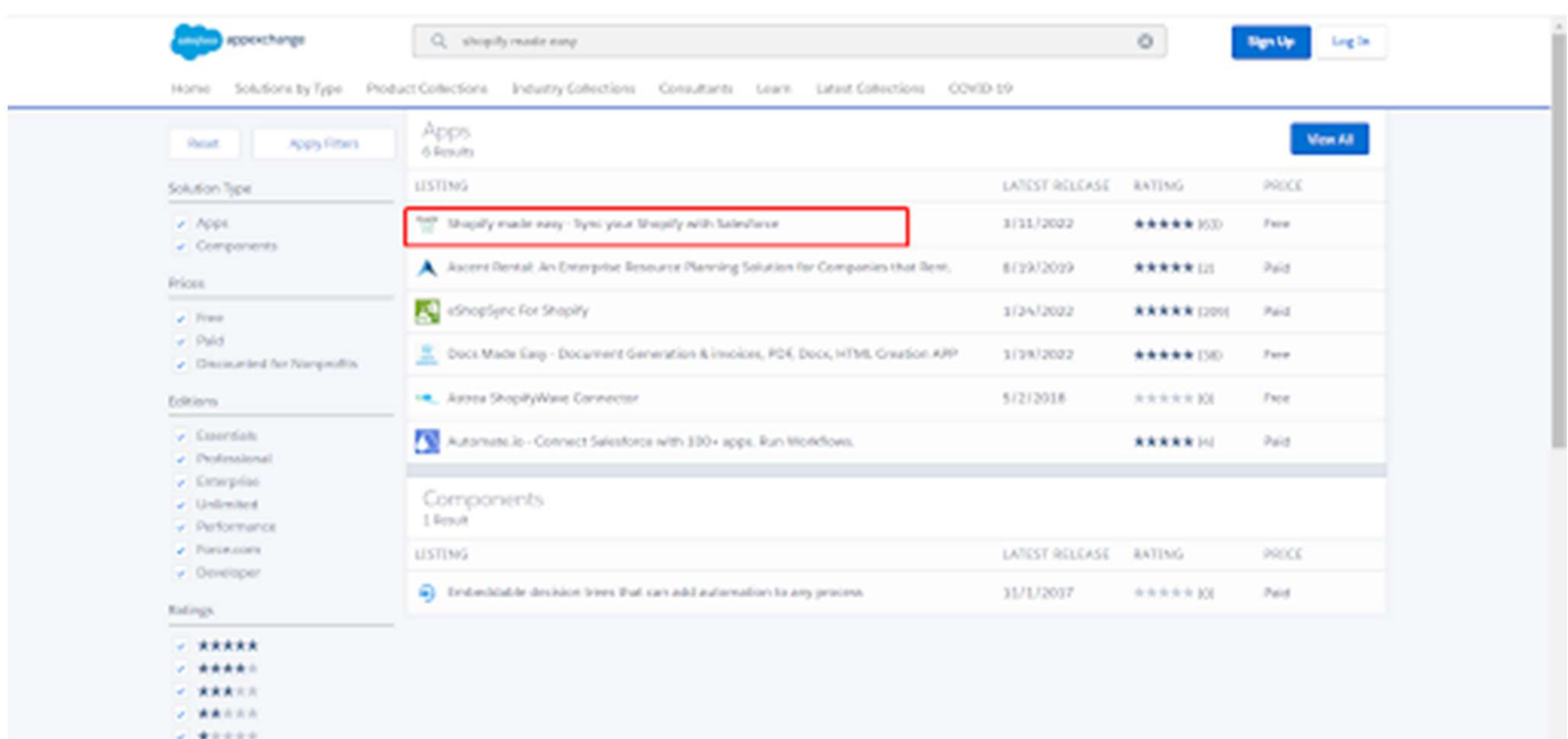


Figure - 1

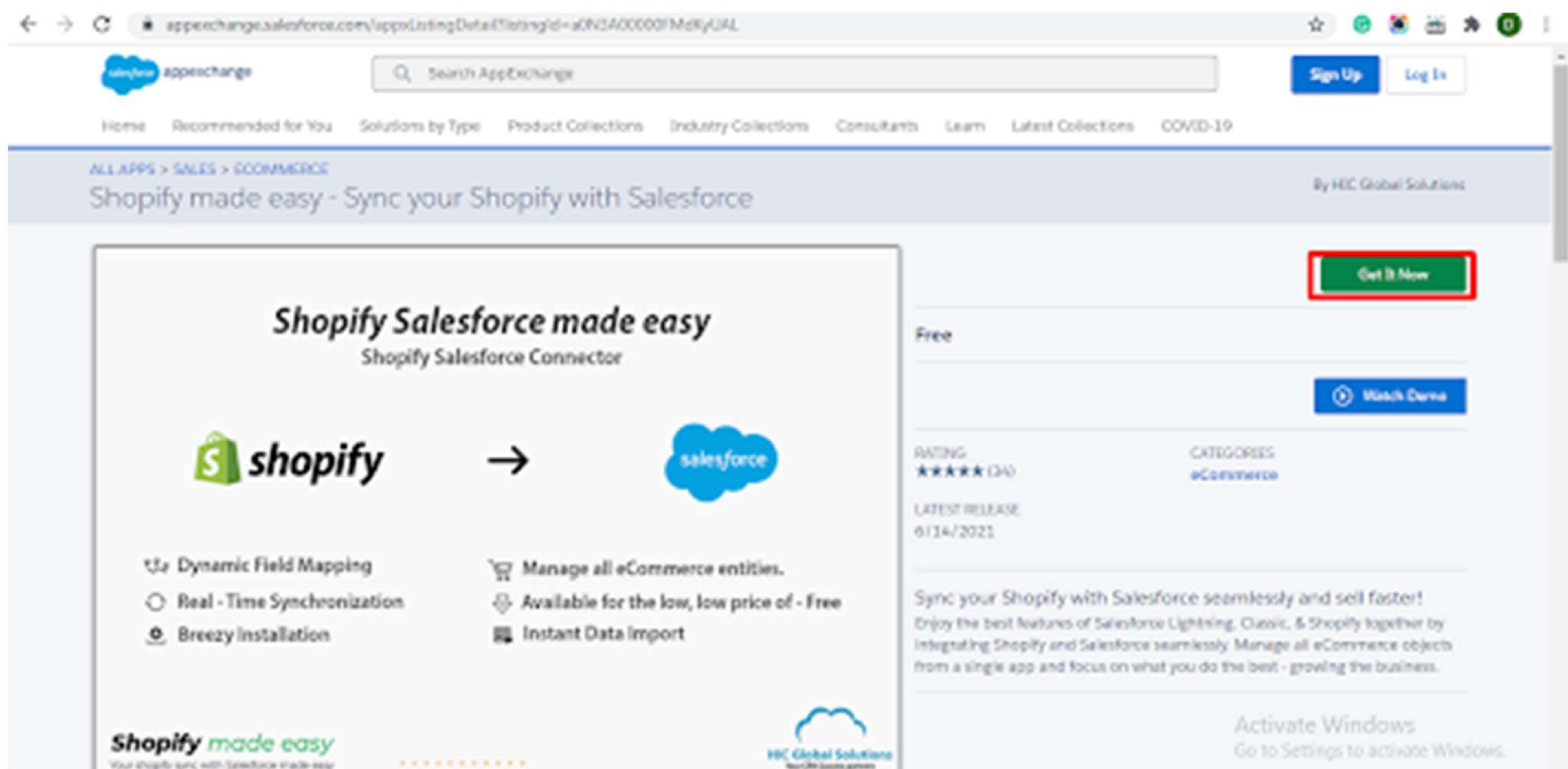


Figure – 2

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

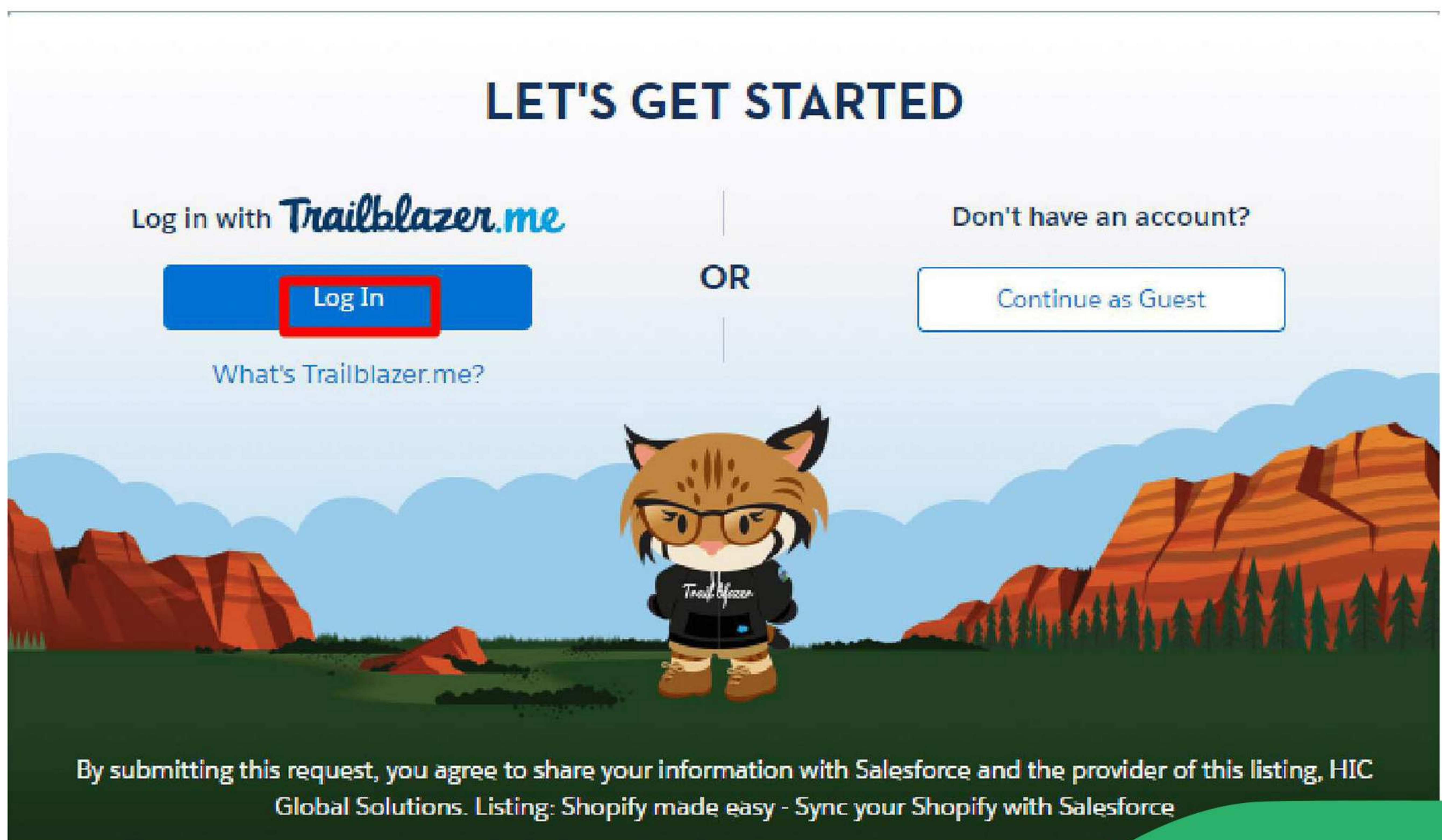


Figure – 3

- After logging in, You will be asked where to install the package. Select “Install In Production.” as shown in Figure 4.

Where do you want to install this package?

Install in a Production Environment

Install this package in the org where you or your users work, including Developer Edition orgs.

* Connected Salesforce Accounts ⓘ

dee *****@is.com

Don't see your account? [More Info](#)

Install in Production

Install in a Sandbox

Test this package in a copy of a production org.

Install in Sandbox

[Cancel](#)

Figure - 4

- 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 05.

Confirm Installation Details

deepa@hics.com

Here are the details we'll share from your profile [Edit Profile](#)

* First Name Deepa * Company Aquacrimson

* Last Name Sinha * Country India

Job Title content writer State/Province

* Email deepaghosh83@gmail.com

Phone

☒ I have read and agree to the [terms and conditions](#).


Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review.](#)


☐ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

[Cancel](#) [Confirm and Install](#)


Figure – 5

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


 **Install HIC_ShopifySync**
By HIC Global Solutions



☐ Install for Admins Only



☒ **Install for All Users**



☐ Install for Specific Profiles...

[Install](#) [Cancel](#)

App Name	Publisher	Version Name	Version Number
HIC_ShopifySync	HIC Global Solutions	HICshopifymadeEasy V 1.183.1	1.183.1

[Additional Details](#) [View Components](#)

Figure – 6

- 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 07.

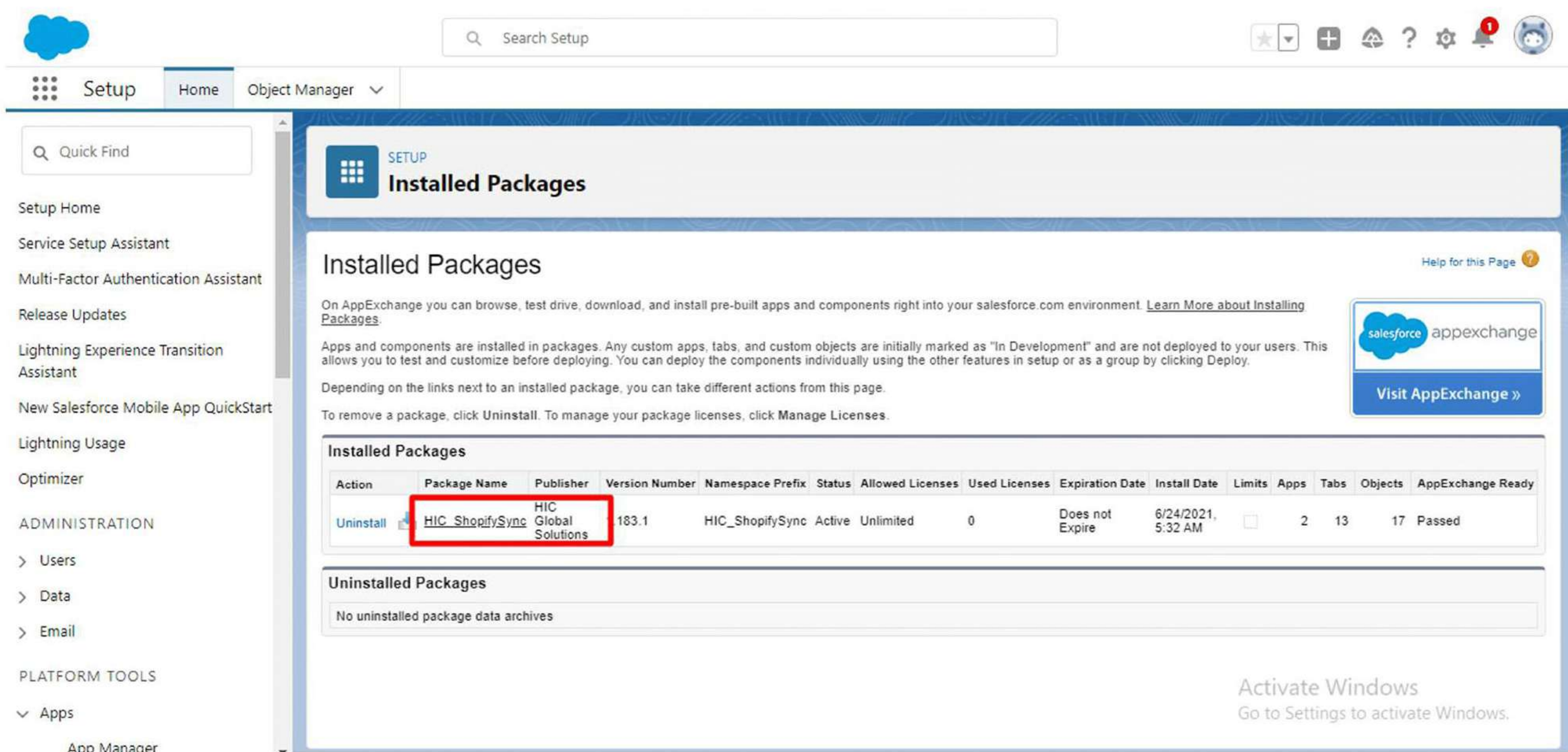


Figure – 7

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 8 for reference.

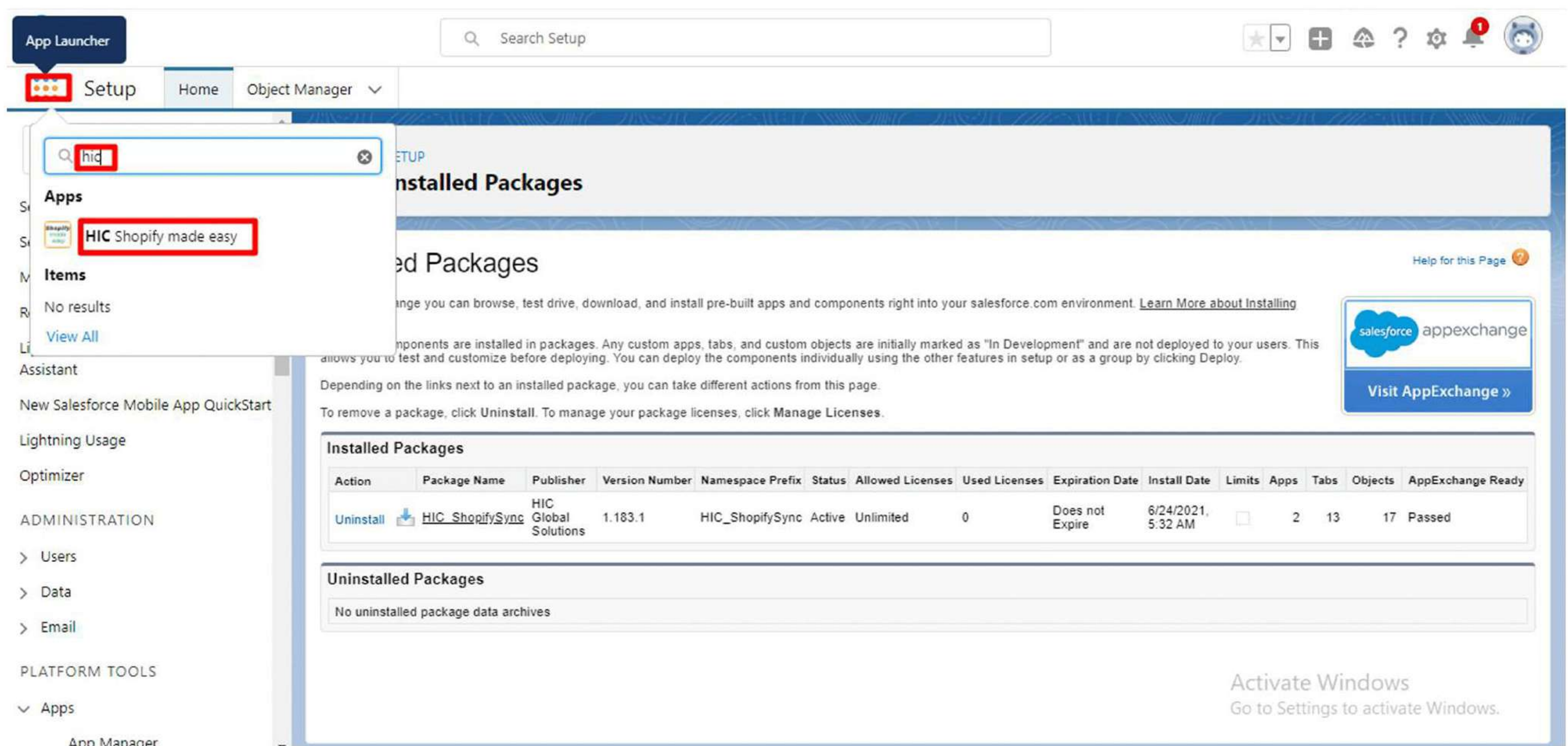


Figure – 8

- Next, Go to Salesforce Shopify Sync Settings as seen in figure 09.

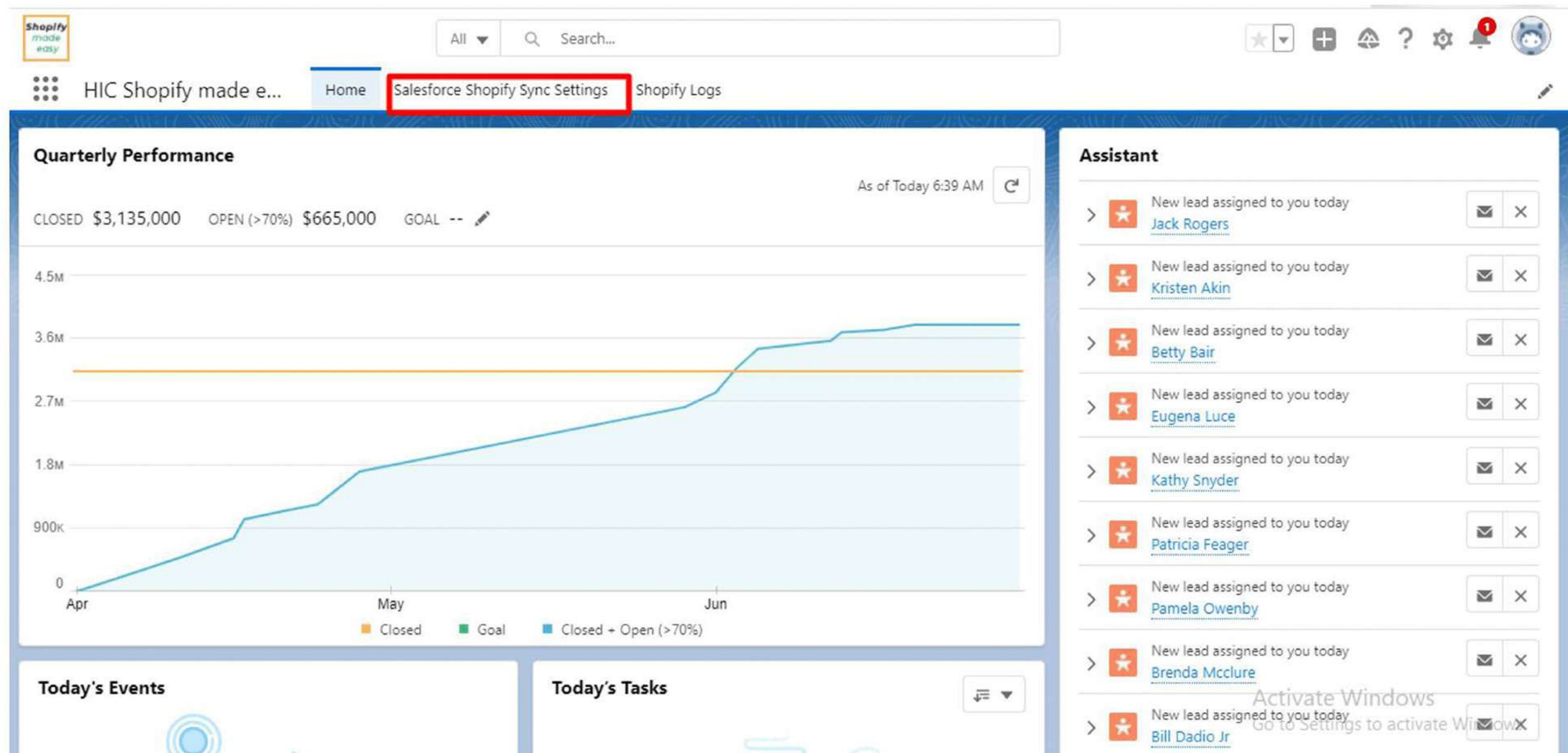


Figure – 9

- 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 10

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 10.

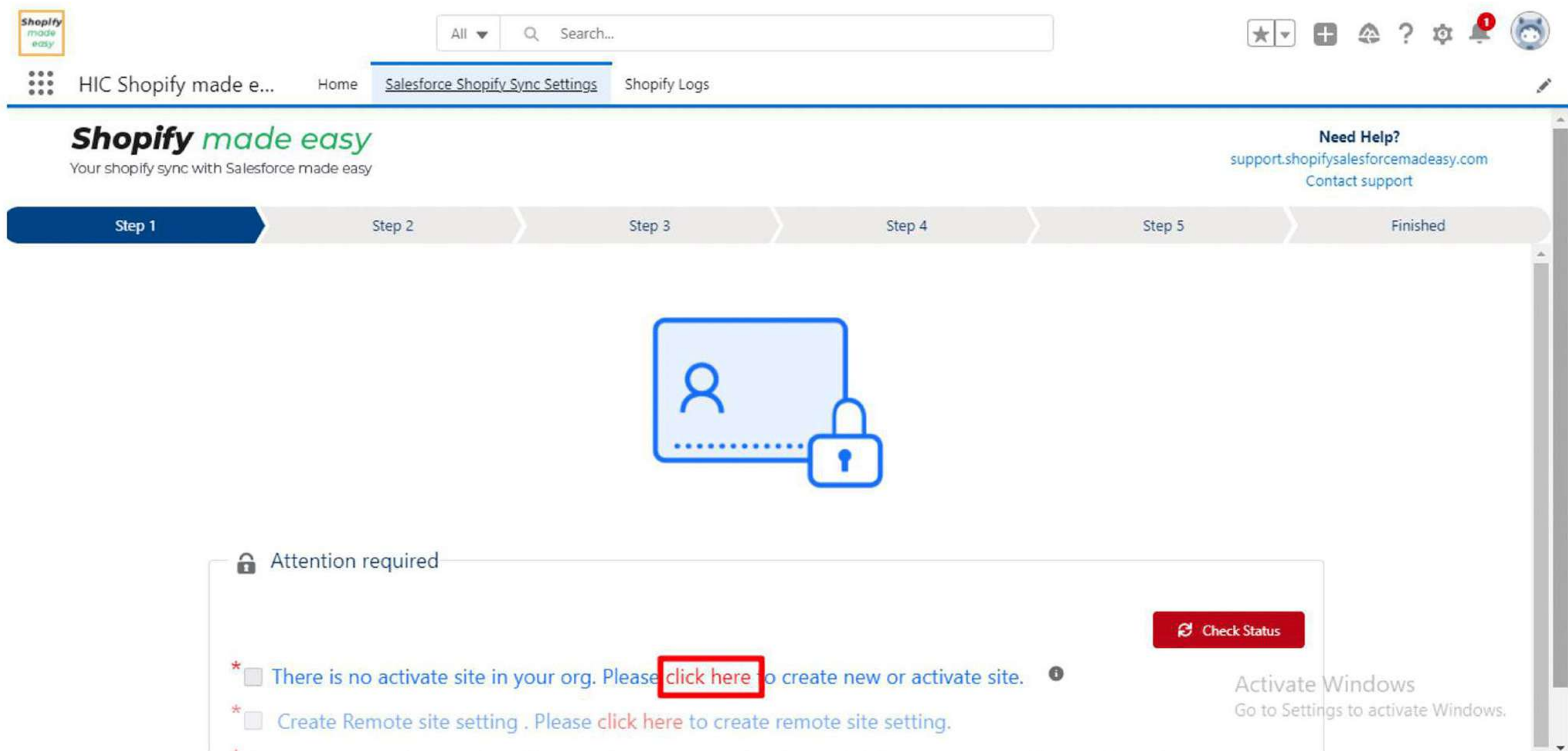


Figure – 10

- This will take you to a webpage as shown in Figure 11.
- Here, enter in a unique Domain Name for your Salesforce Site.

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.

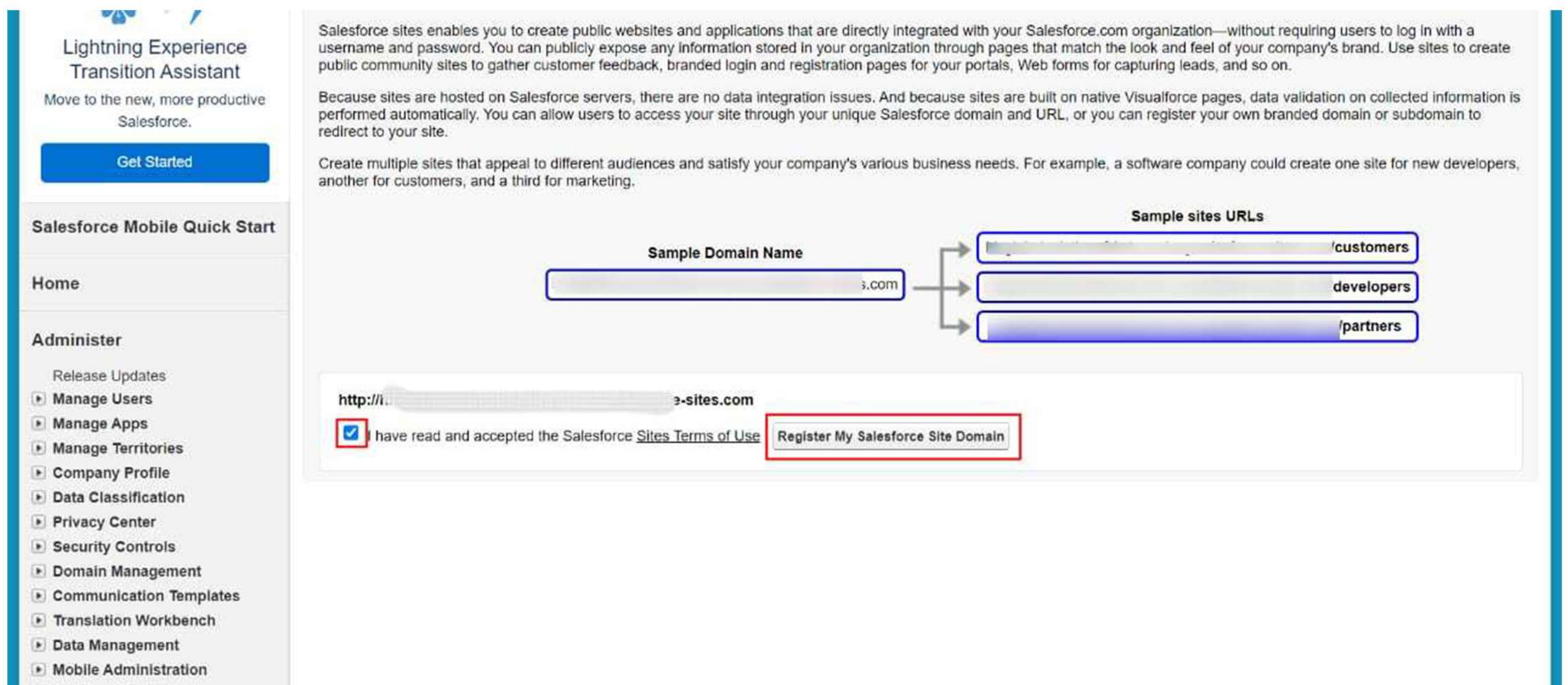


Figure - 11

- In a while, refreshing the page should display your Salesforce Site Domain Name as depicted in Figure 12

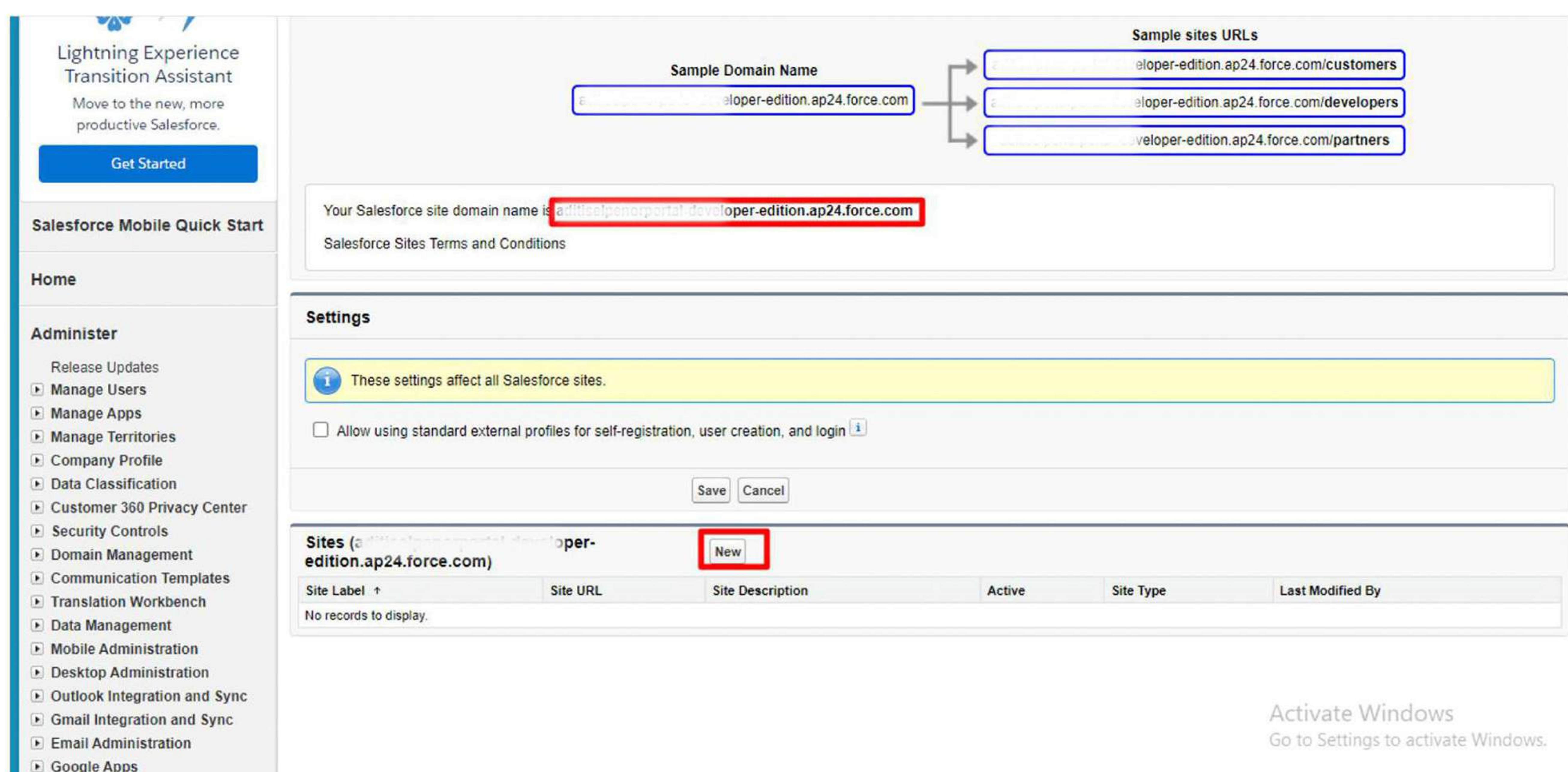


Figure - 12

- 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 13. You only need to enter the Site Label and Site Name.

The screenshot displays the 'New Site' configuration page in Salesforce. The left sidebar contains navigation options like 'Select Metadata', 'Advanced Search', 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administer'. The main content area is titled 'New Site' and includes a 'Save' button (highlighted with a red box). Below this, there are several fields: 'Site Label' and 'Site Name' (both highlighted with red boxes), 'Site Description', 'Site Contact', 'Default Record Owner', 'Default Web Address', 'Active' checkbox, 'Active Site Home Page' (highlighted with a red box and a lookup icon), 'Inactive Site Home Page' (set to 'InMaintenance'), 'Site Template', 'Site Robots.txt', 'Site Favorite Icon', 'Analytics Tracking Code', 'URL Rewriter Class', 'Enable Feeds', 'Clickjack Protection Level' (set to 'Allow framing by the same origin only (Recommended)'), 'Lightning Features for Guest Users', and 'Enable Content Sniffing'. The 'Active Site Home Page' field is currently empty, indicating it needs to be populated.

Figure – 13

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

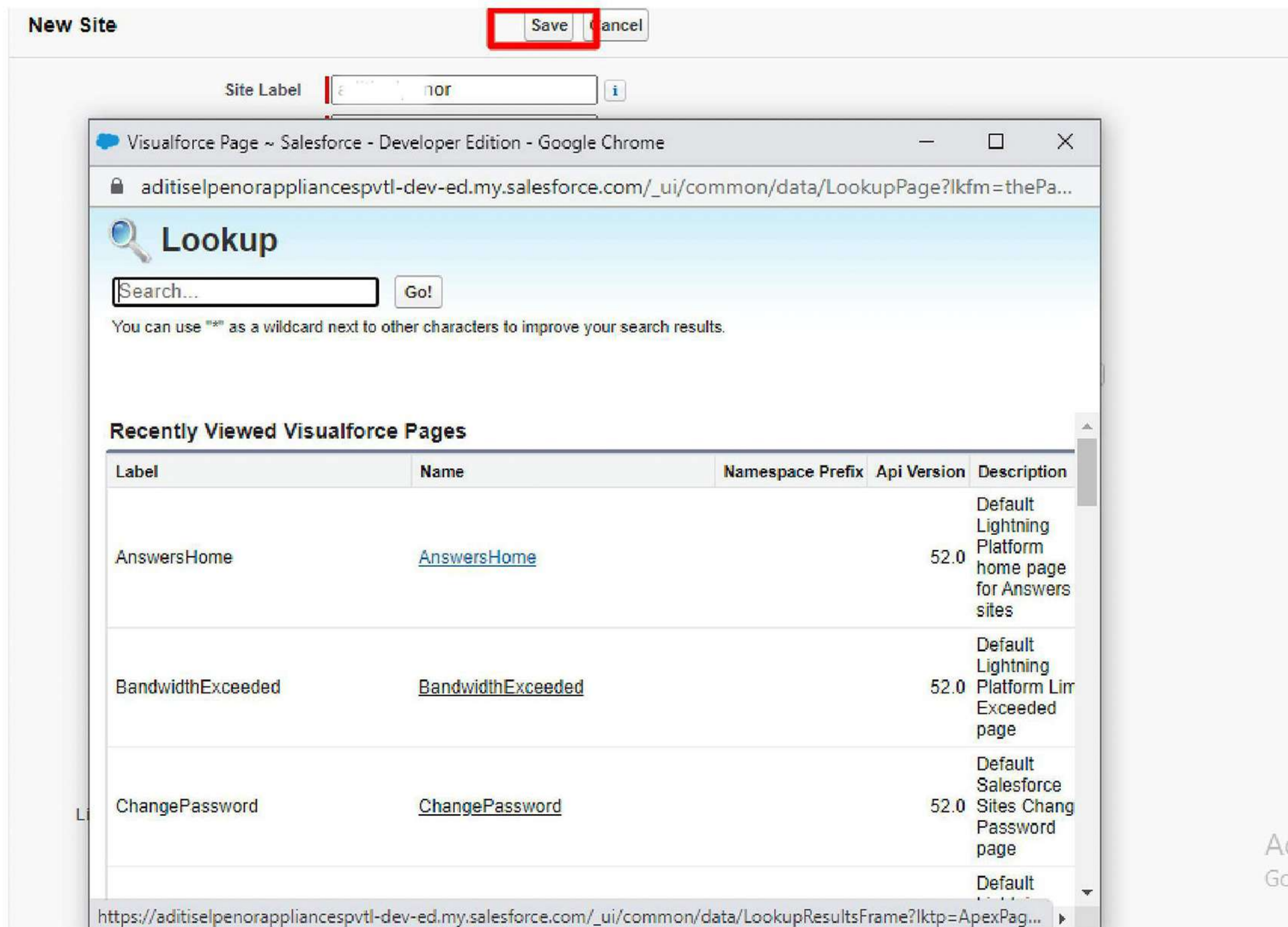


Figure - 14

- 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 15.

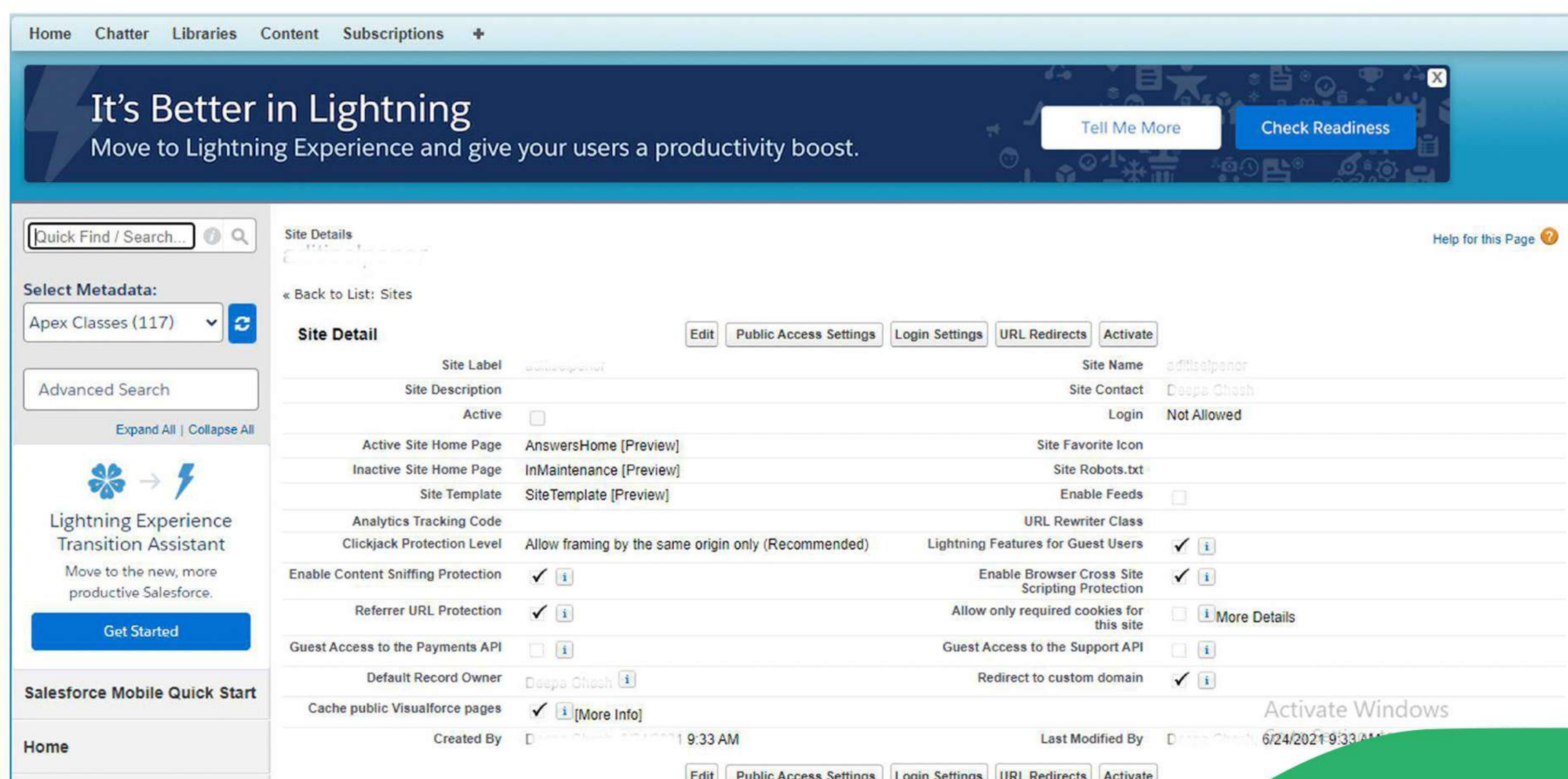


Figure - 15

- 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 16 for reference.

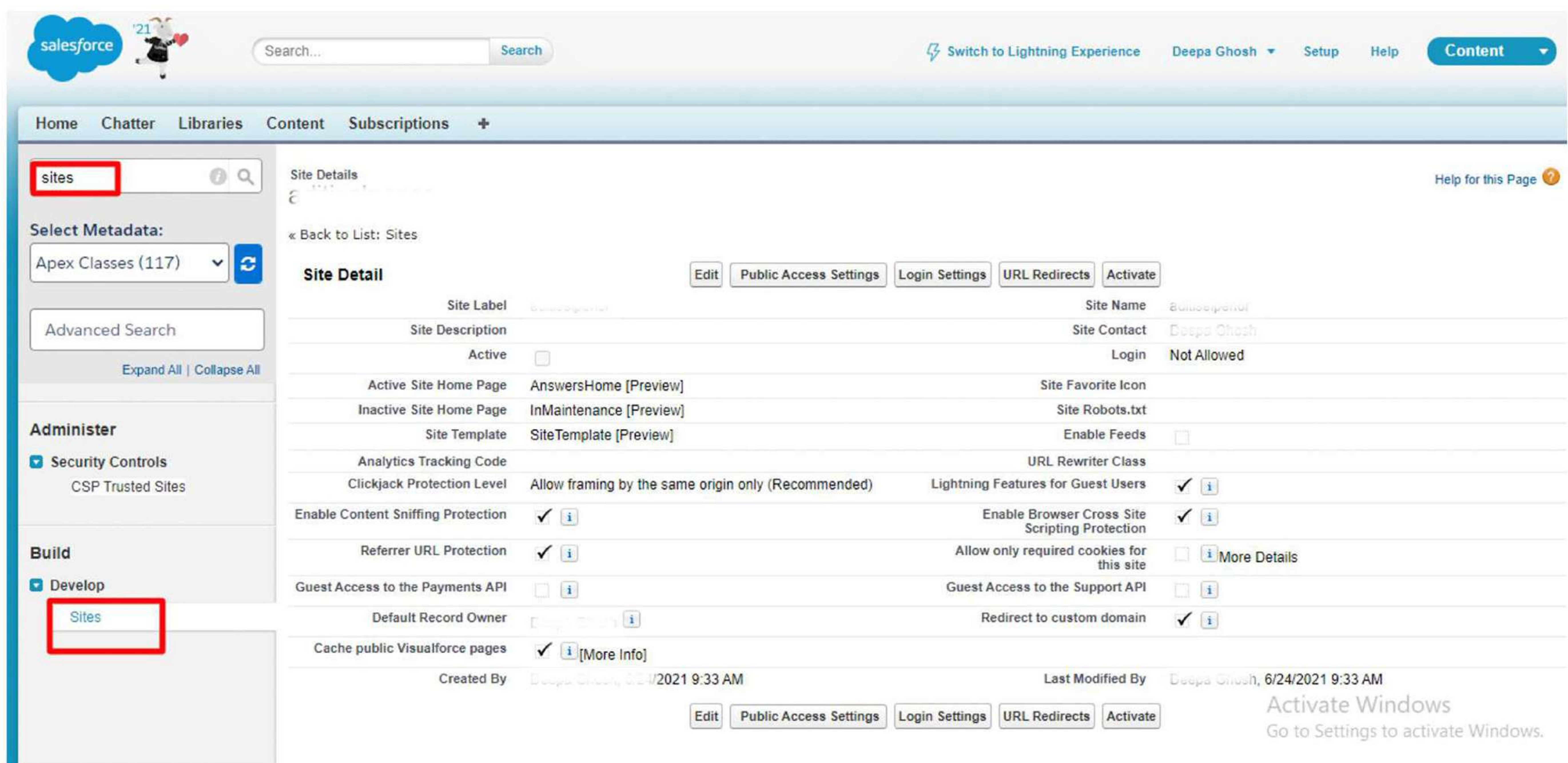


Figure - 16

- This redirects you to the webpage to activate your created site. Once on that page, click on “**Activate**” as displayed in figure 17.

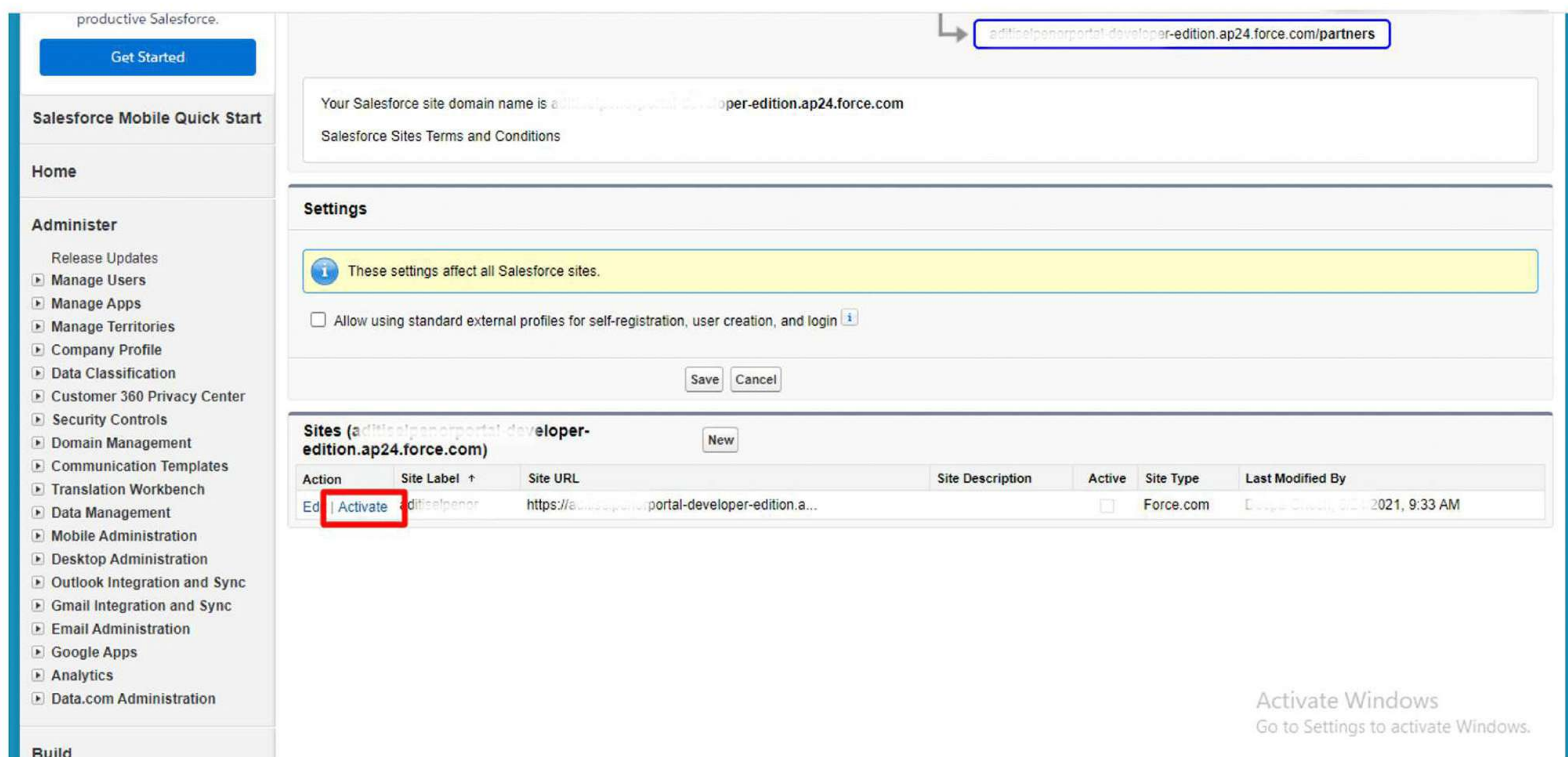


Figure – 17

- 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 18

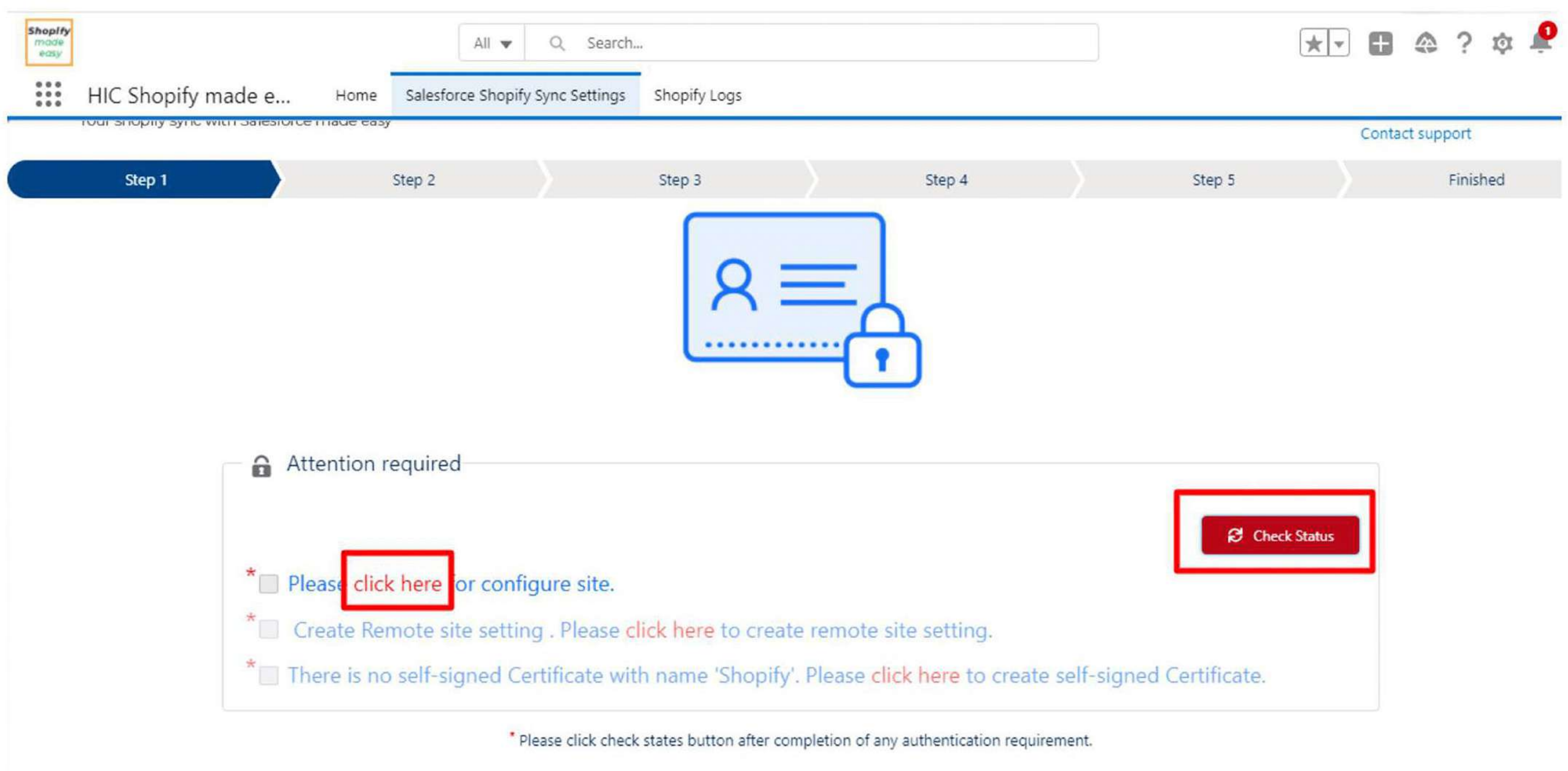


Figure – 18

- This will take you to the webpage to enter your site. Refer Figure 19

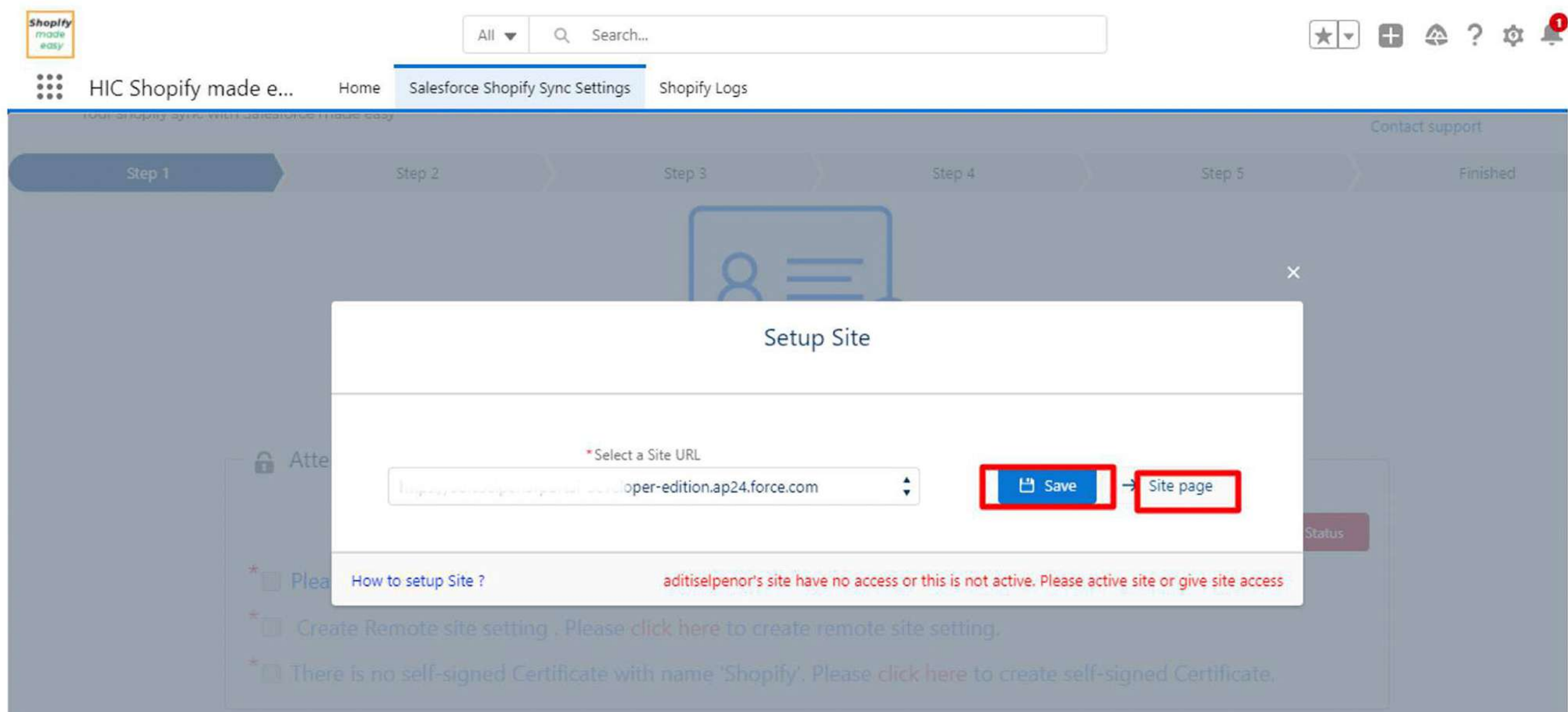


Figure – 19

- 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 20

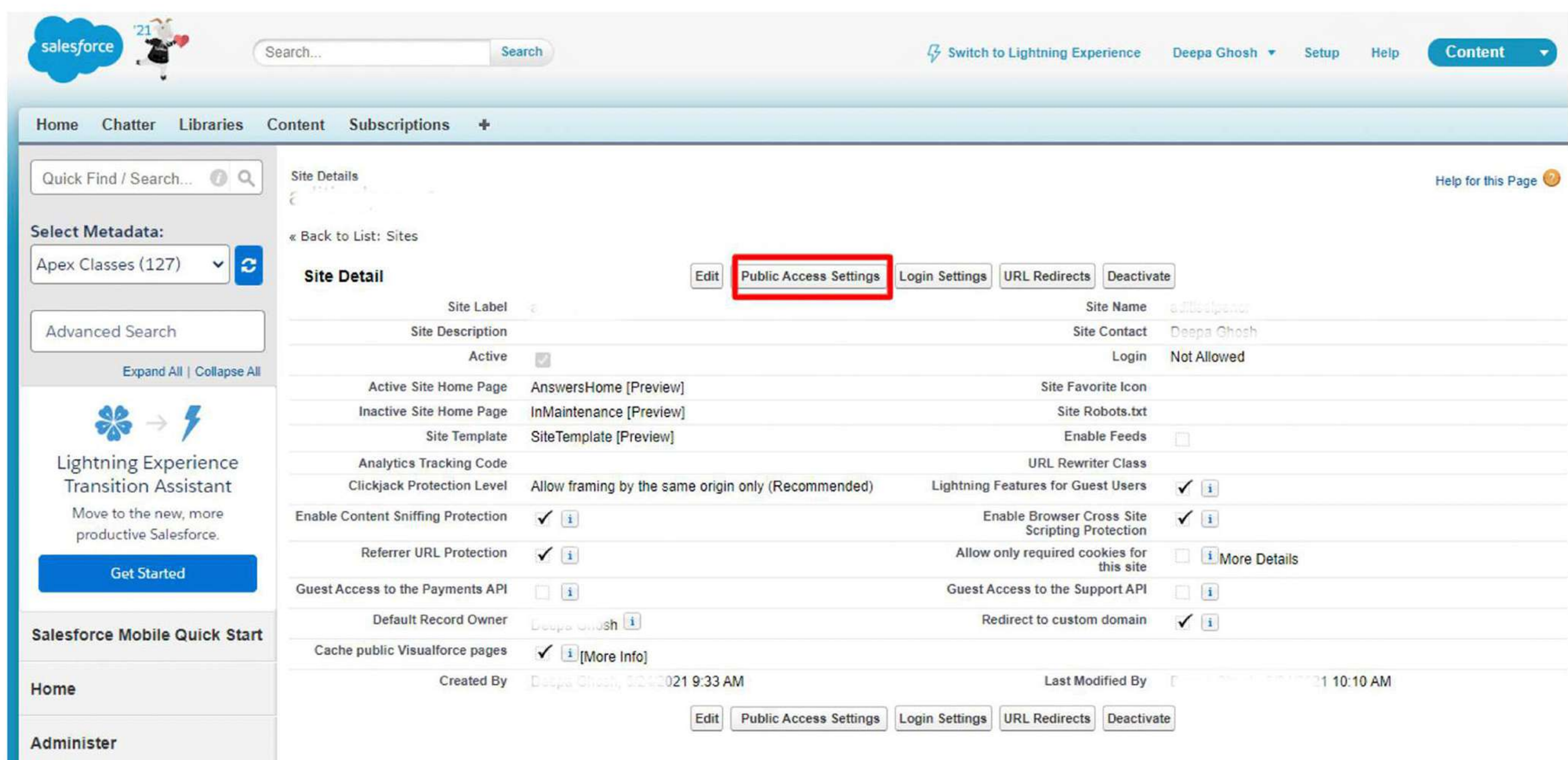


Figure – 20

- This brings you to the Profile page. Here, Click on **“Enabled Apex Class Access”** as shown in Figure 21. Then Click **‘Edit’**

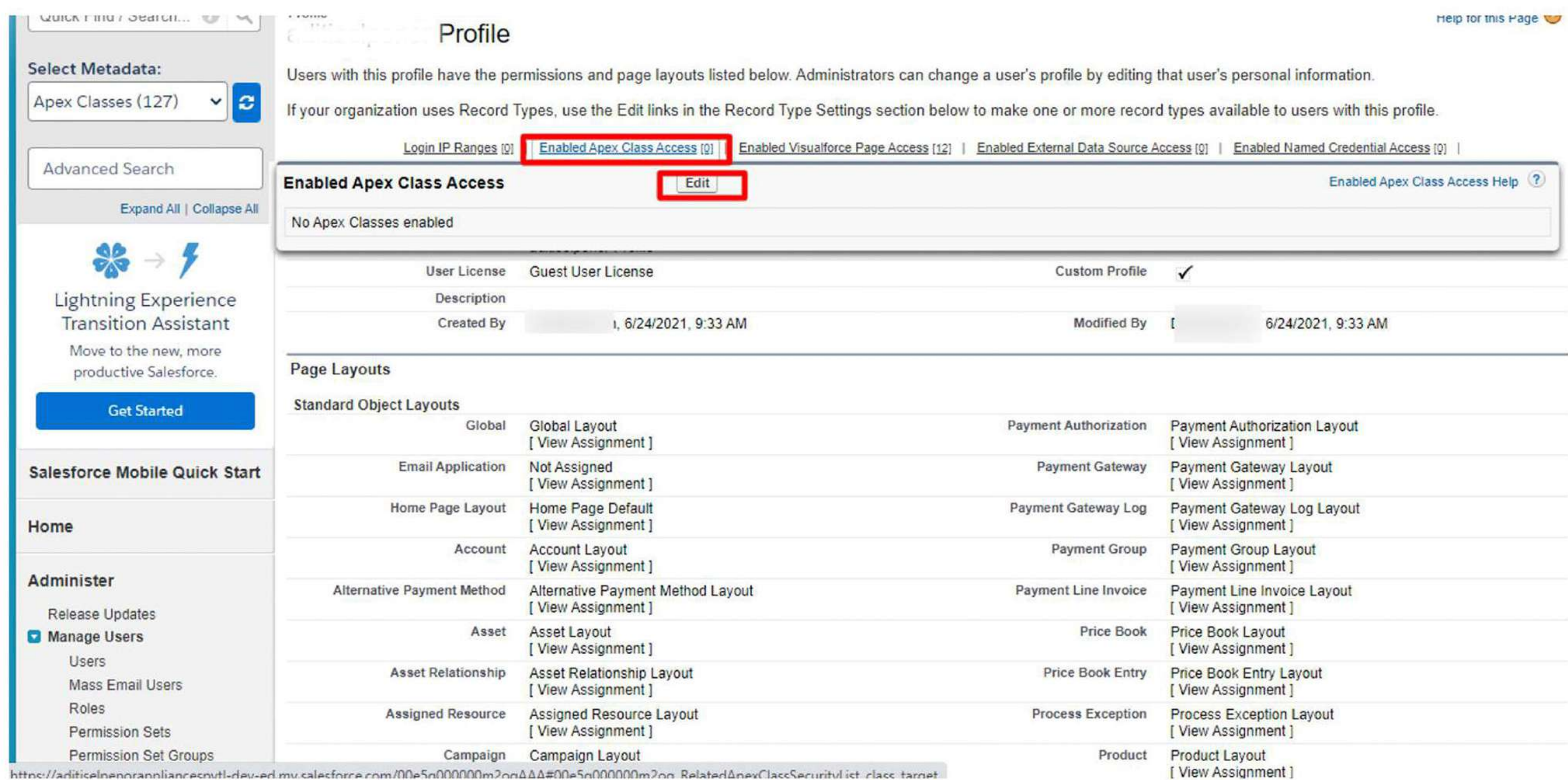


Figure – 21

- You should be on Enable Apex Class access page, Here, Select '**HIC_ShopifySync.Authenticate all apex classes**' and click on **ADD** and then **SAVE**. Refer figure 22

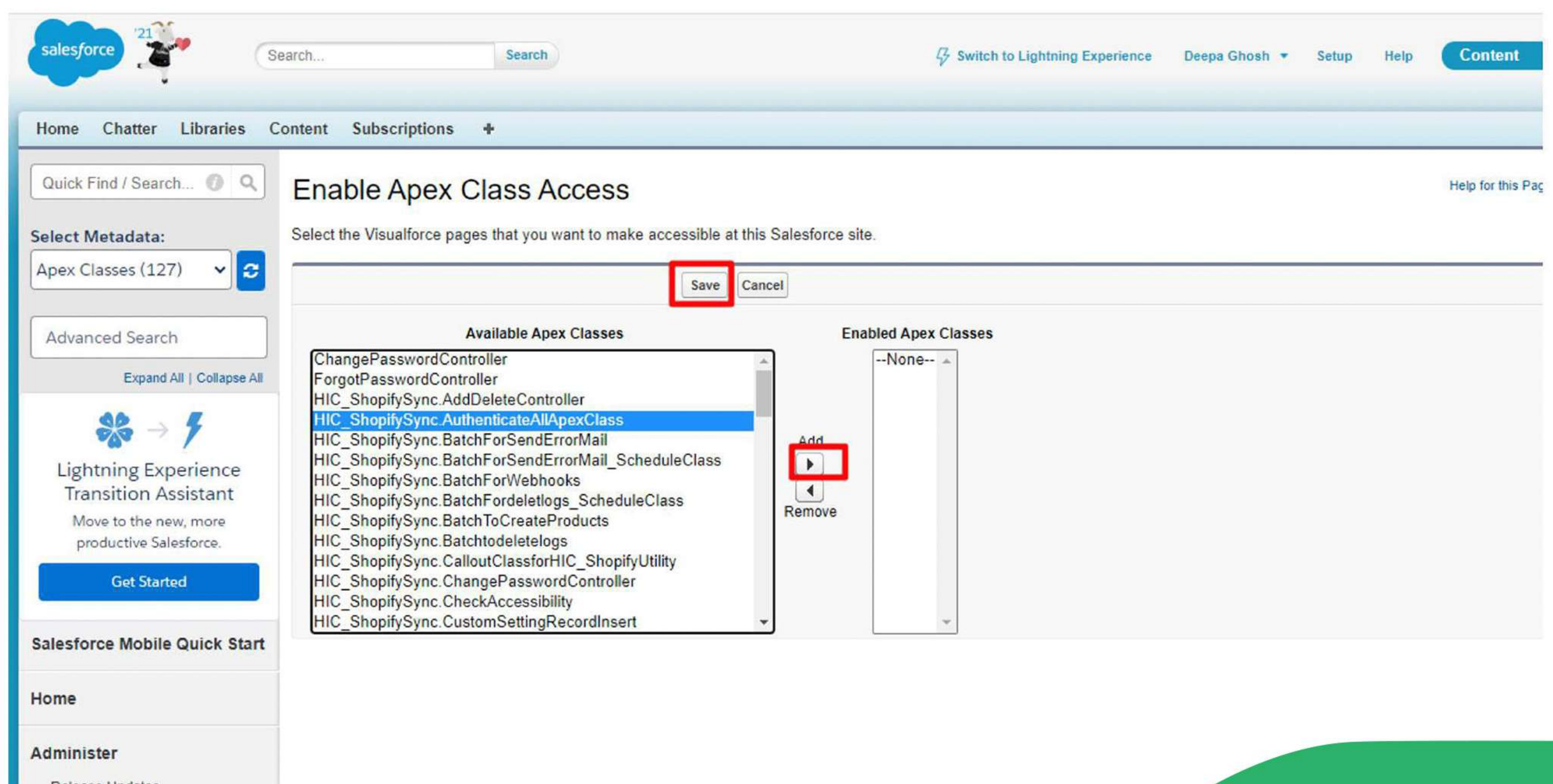


Figure – 22

- Once you have given access to the site, go back to the Sync Settings page and click on **Save** to set up the site as seen in figure 23.

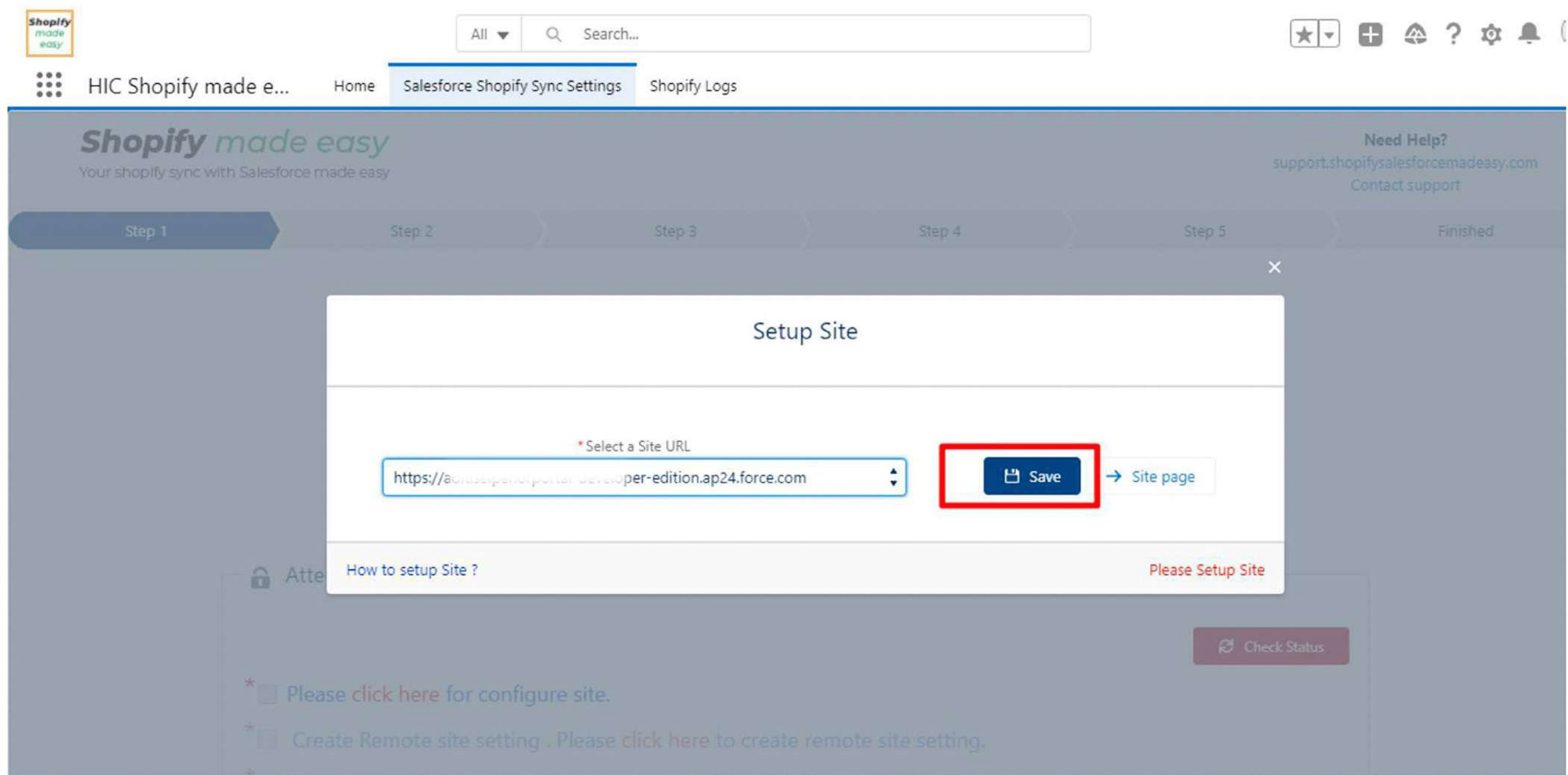


Figure - 23

- 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 24.

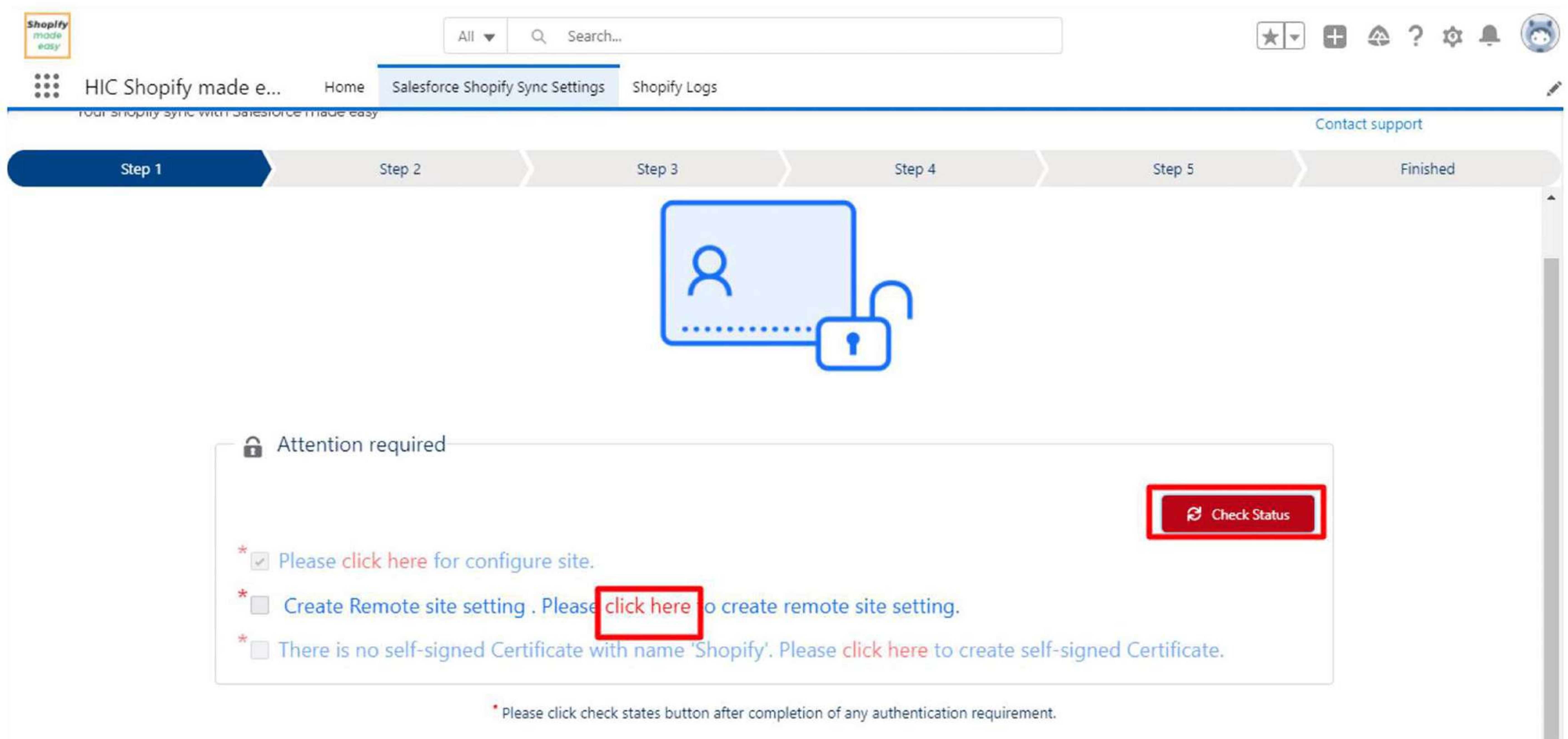


Figure - 24

- 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 25

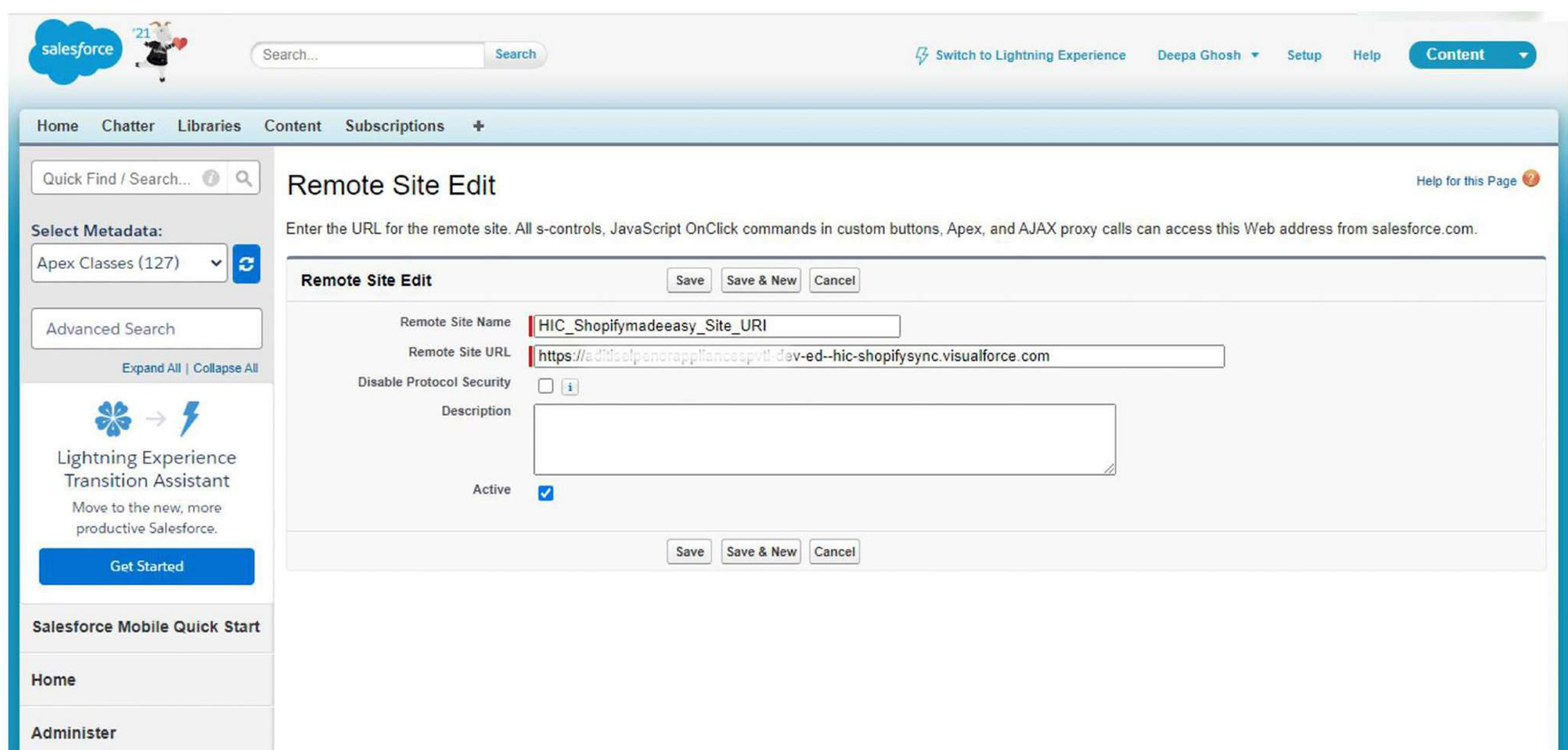


Figure - 25

- 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 26

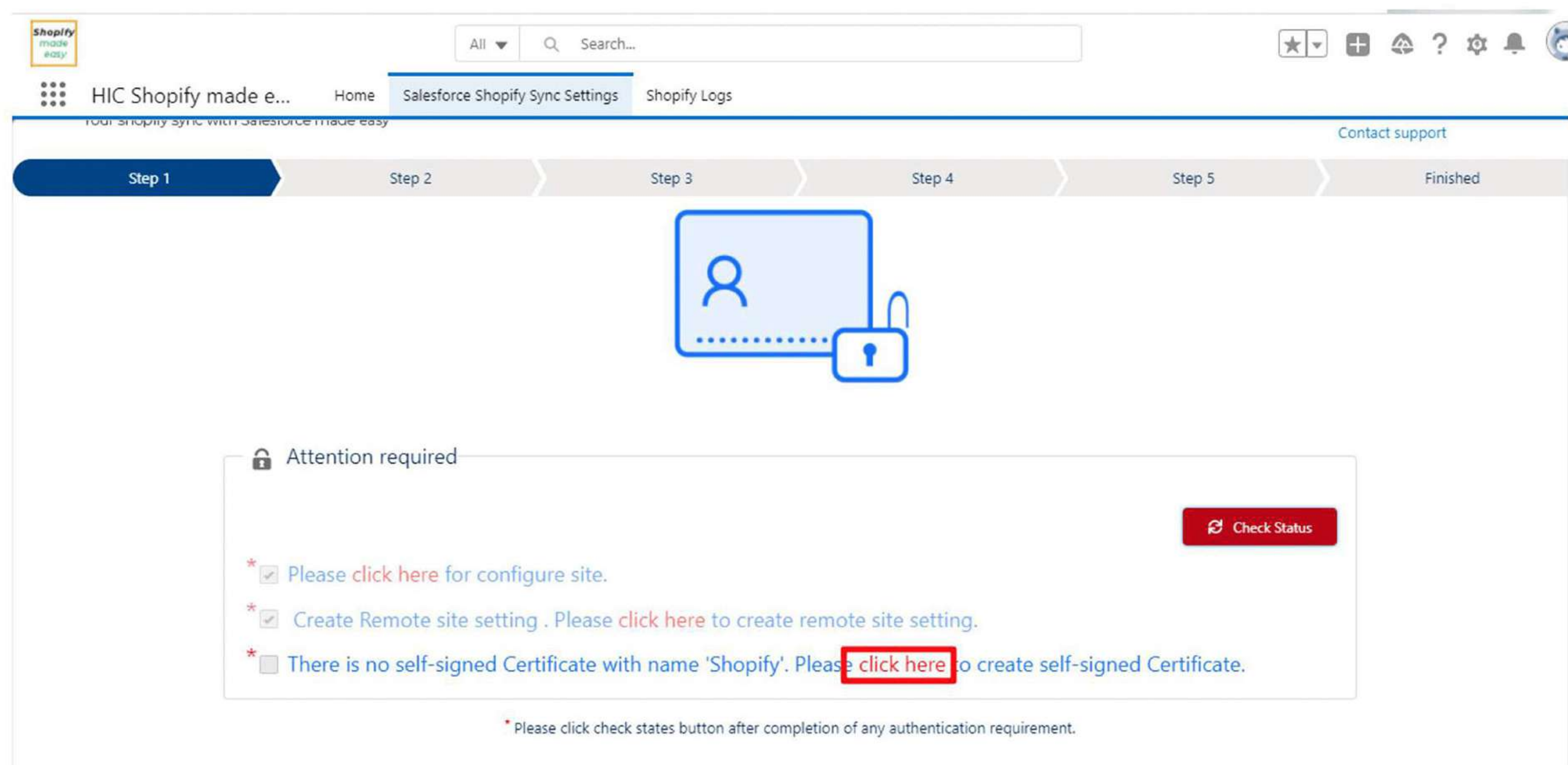


Figure – 26

- On the Certificate page, click on **“Save”** as seen in figure 27

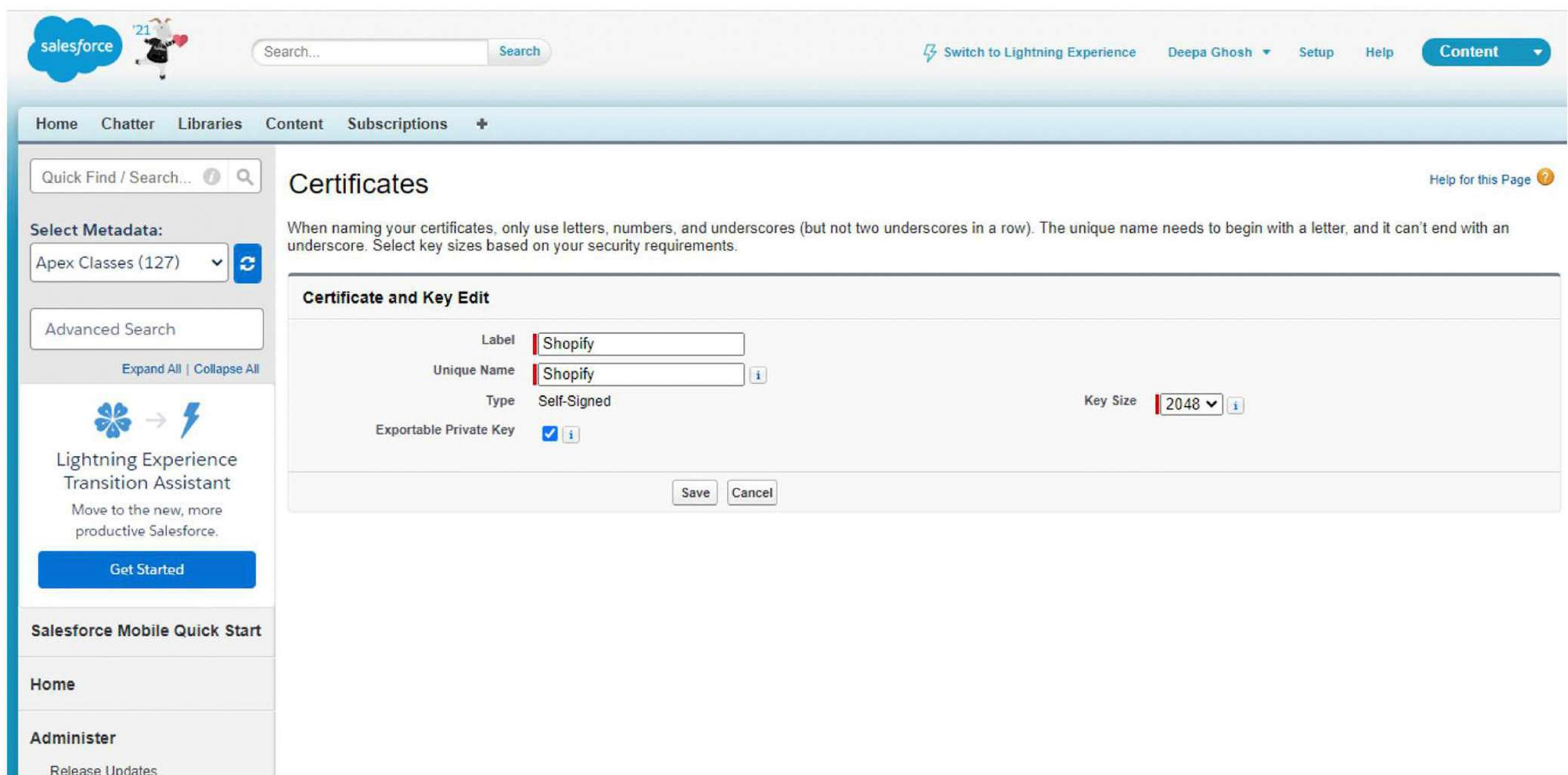


Figure – 27

- 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 28

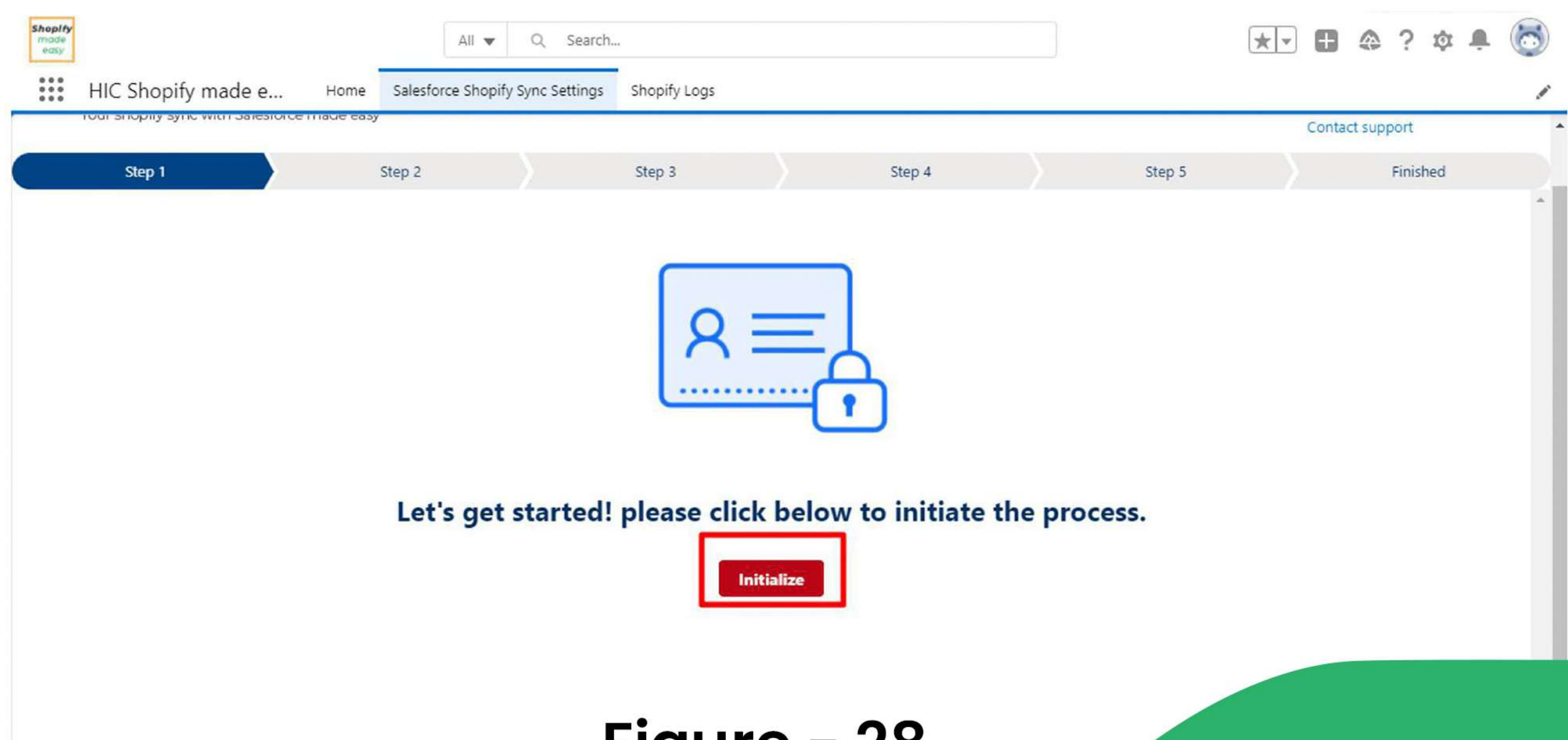


Figure – 28

- On the next page. Click on **“Allow”** to allow access
See Figure 29

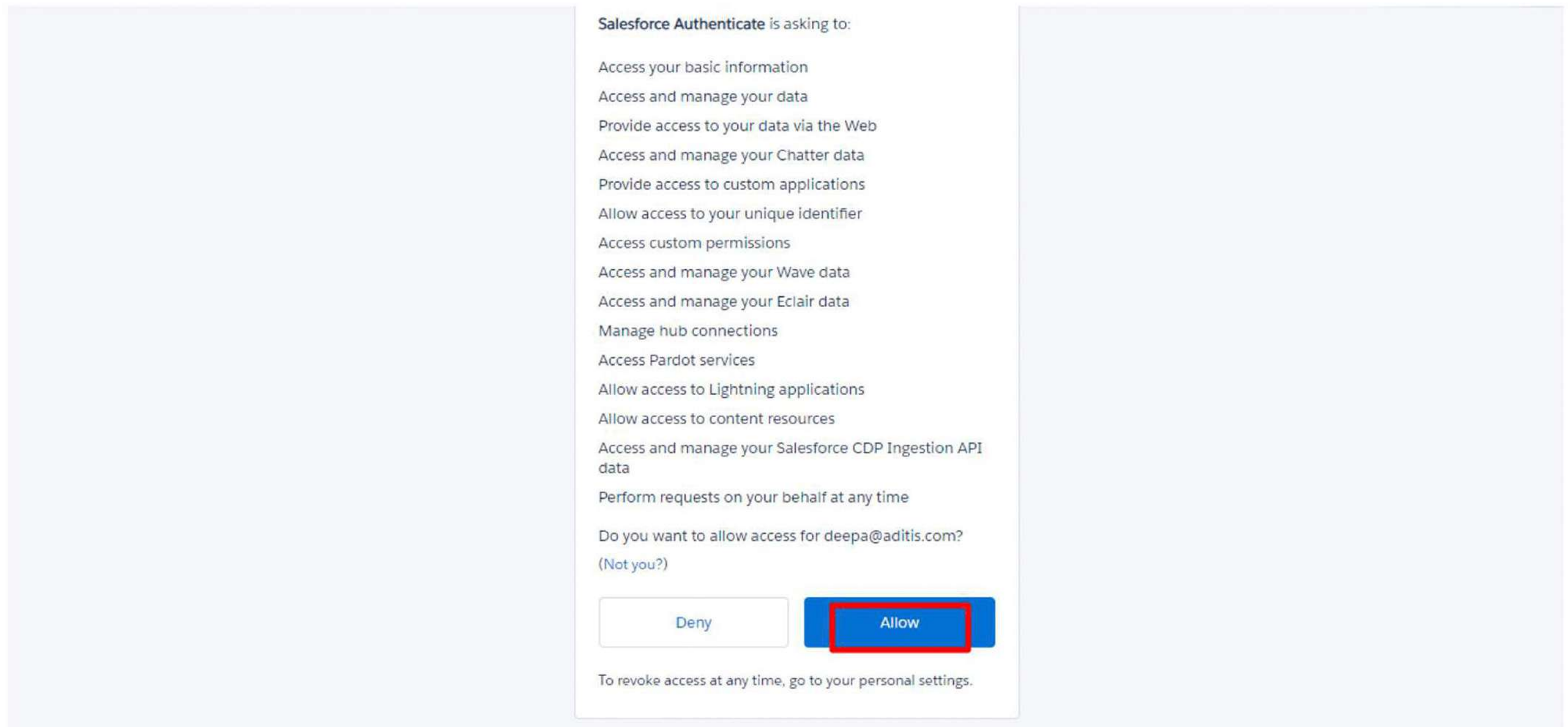


Figure – 29

- On this page, initialization is done, Now Click on **“Go To Next Step”**.See Figure 30

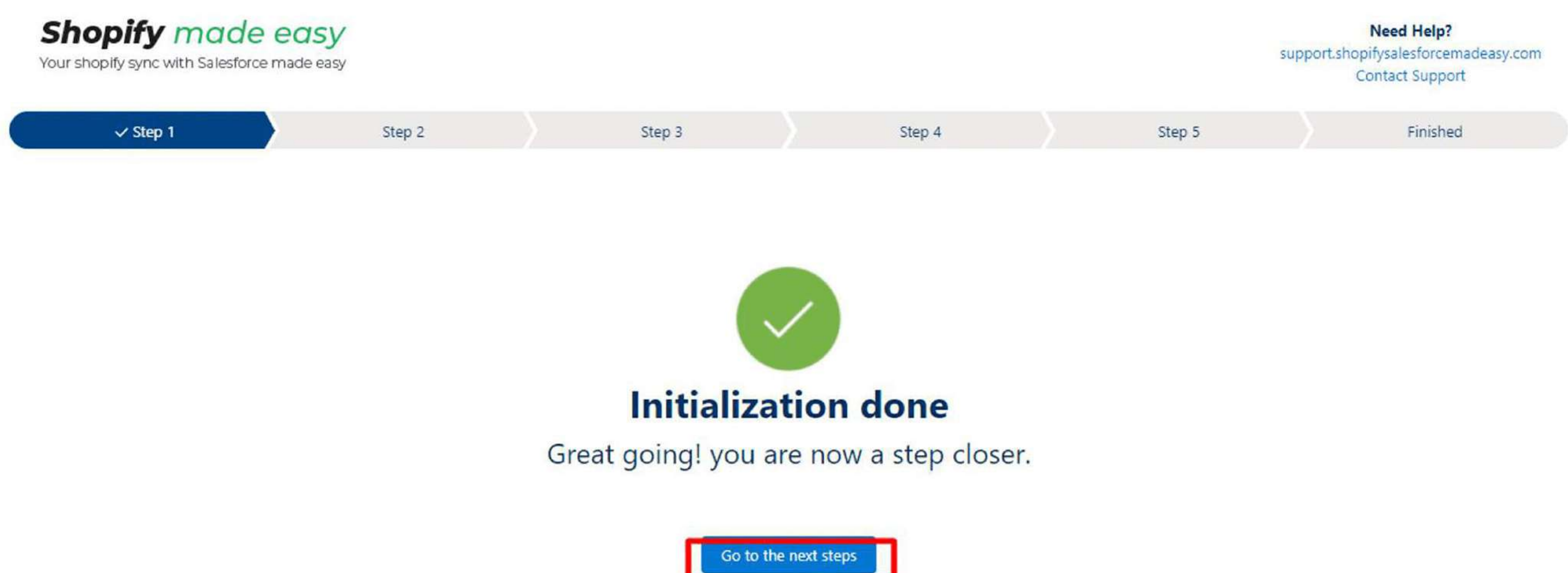
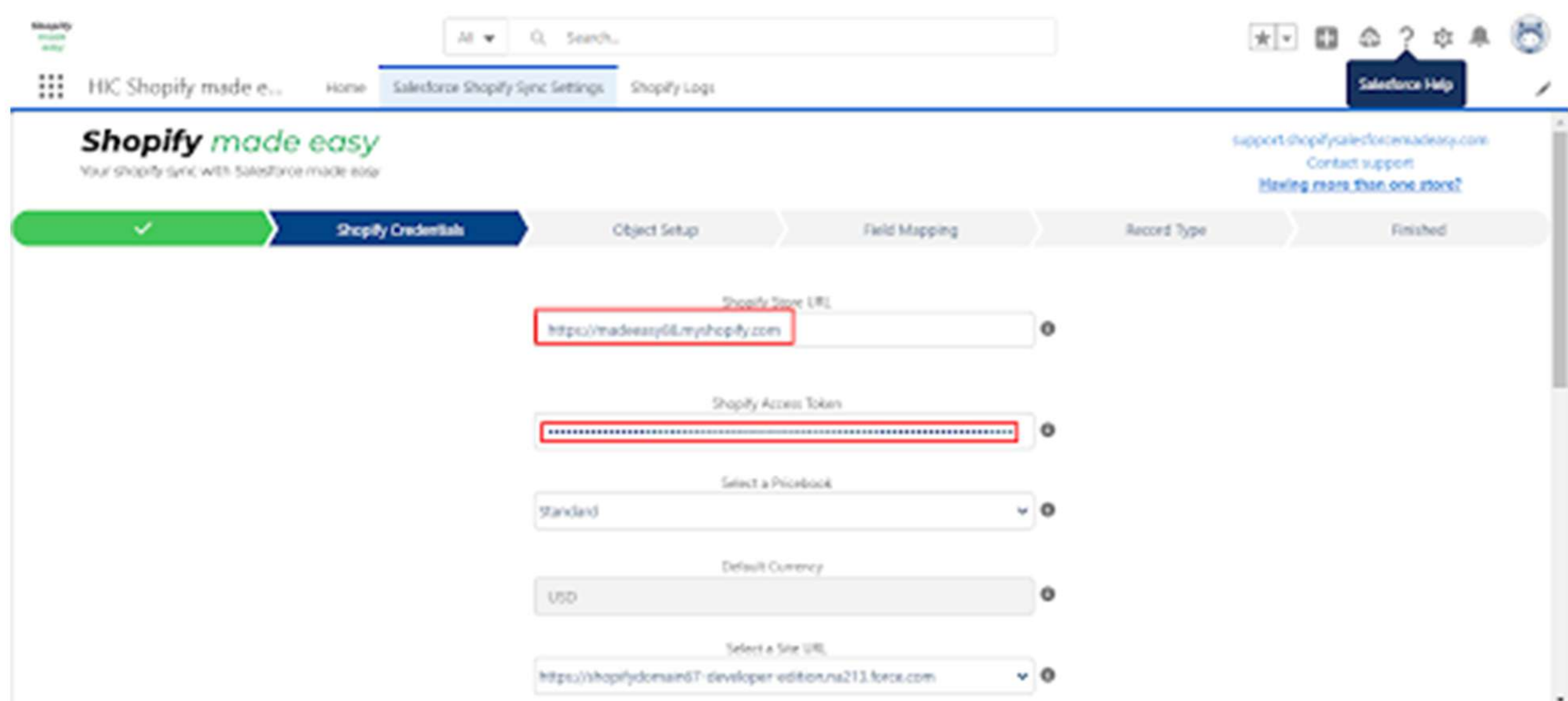


Figure – 30

5. Retrieving Shopify store URL and Shopify Access Token

- Here onwards, STEP 2 begins which is the Shopify Credentials page. In Step 2, you will need Shopify Store URL and API Access token. as seen in figure 31.



The screenshot shows the 'Shopify Credentials' page within the 'Salesforce Shopify Sync Settings' interface. The page has a breadcrumb trail: Home > Salesforce Shopify Sync Settings > Shopify Logs. The main content area is titled 'Shopify made easy' and includes a progress bar with steps: Shopify Credentials (active), Object Setup, Field Mapping, Record Type, and Finished. Below the progress bar, there are five input fields, each with a red border and a magnifying glass icon on the right:

- Shopify Store URL:**
- Shopify Access Token:**
- Select a Pricebook:**
- Default Currency:**
- Select a Site URL:**

At the top right, there is a 'Salesforce Help' button and a link to 'support.shopifysalesforcemadeeasy.com'.

Figure – 31

5.1 Shopify Store URL and Shopify Access Token

- To retrieve Shopify Store URL and Access Token, 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 at the top of the page. From the same page, Go to Apps. Refer Figure 32.

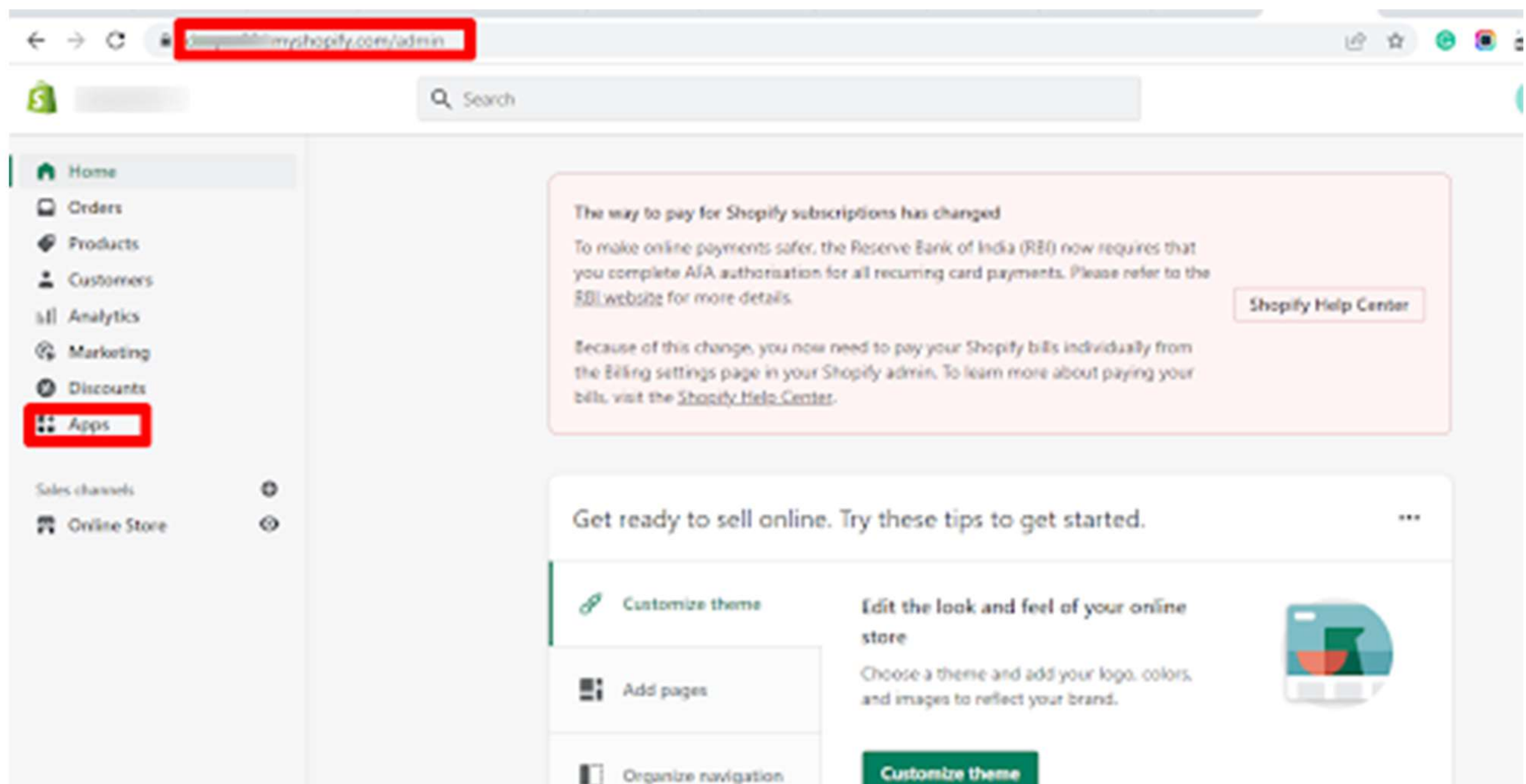


Figure – 32

- You should be now on the Apps page. Scroll down and click on **“Develop apps for your store”**. Check Figure 33 for reference.

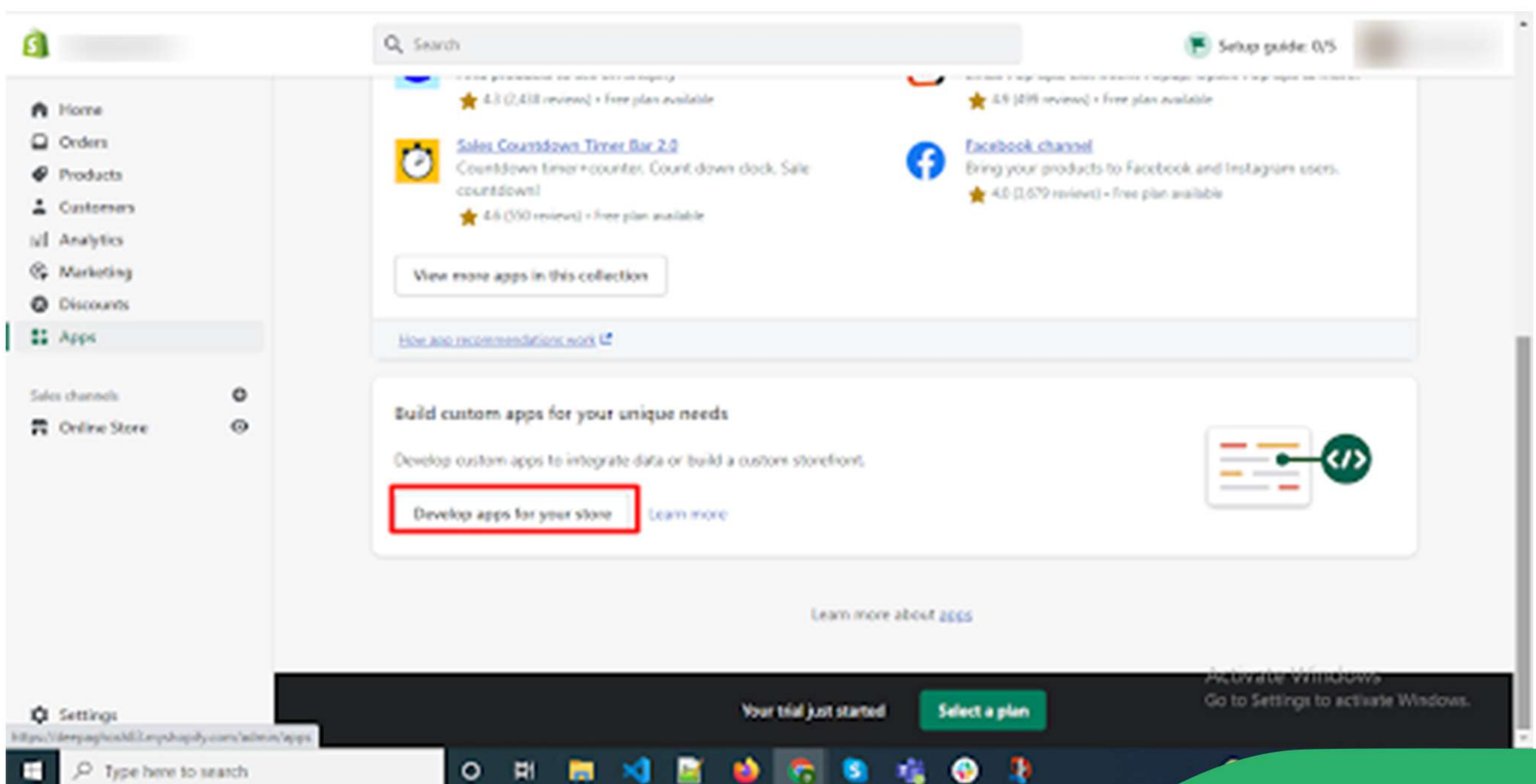


Figure – 33

- You should be now on the App Development page. Now click on **“Allow Custom app Development”** See figure 34 for reference

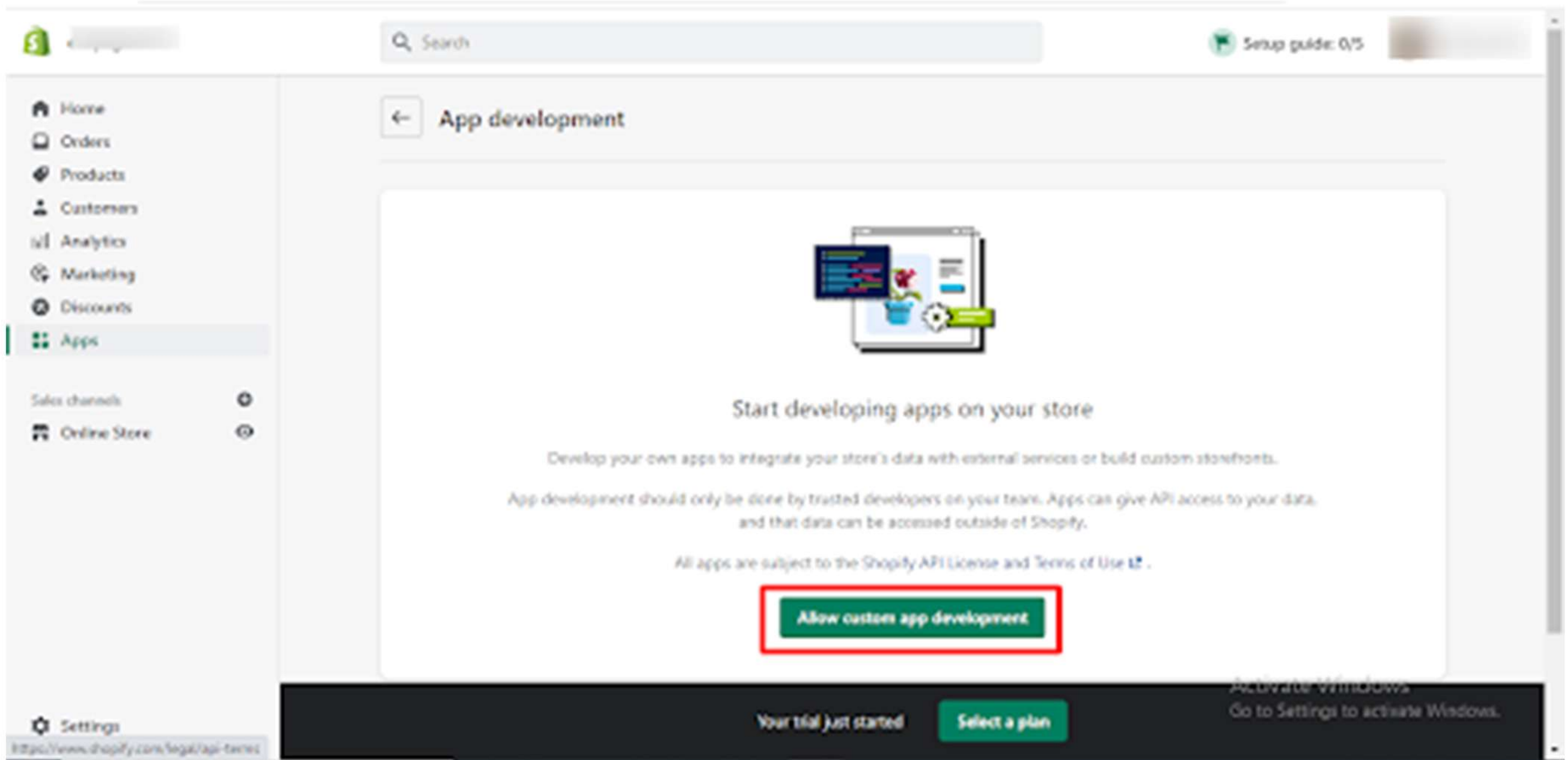


Figure – 34

- On the next page, again click on **‘Allow Custom App Development’** Refer to Figure 35

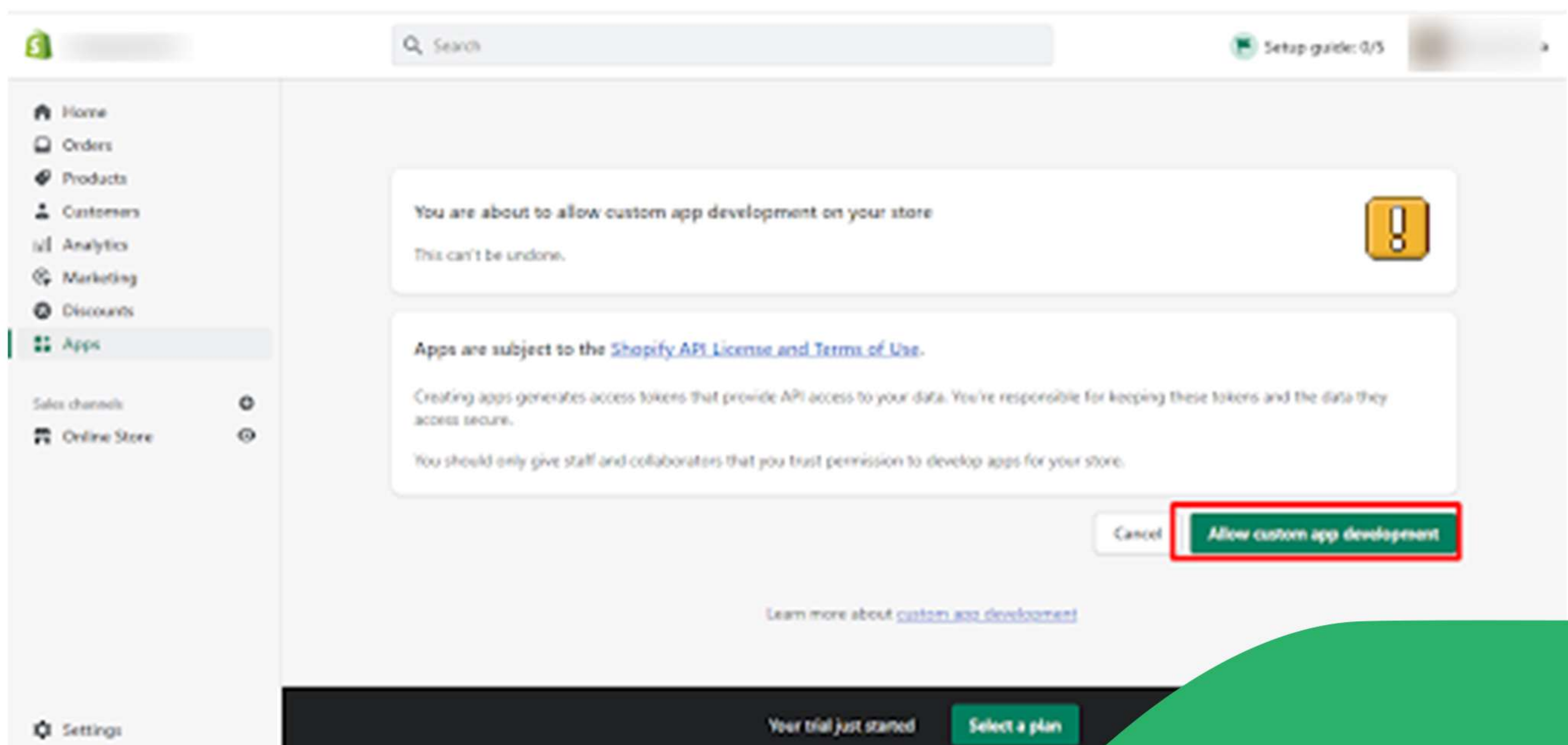


Figure – 35

- Once on the App Development page, click on **“Create an App”** as shown in figure 36

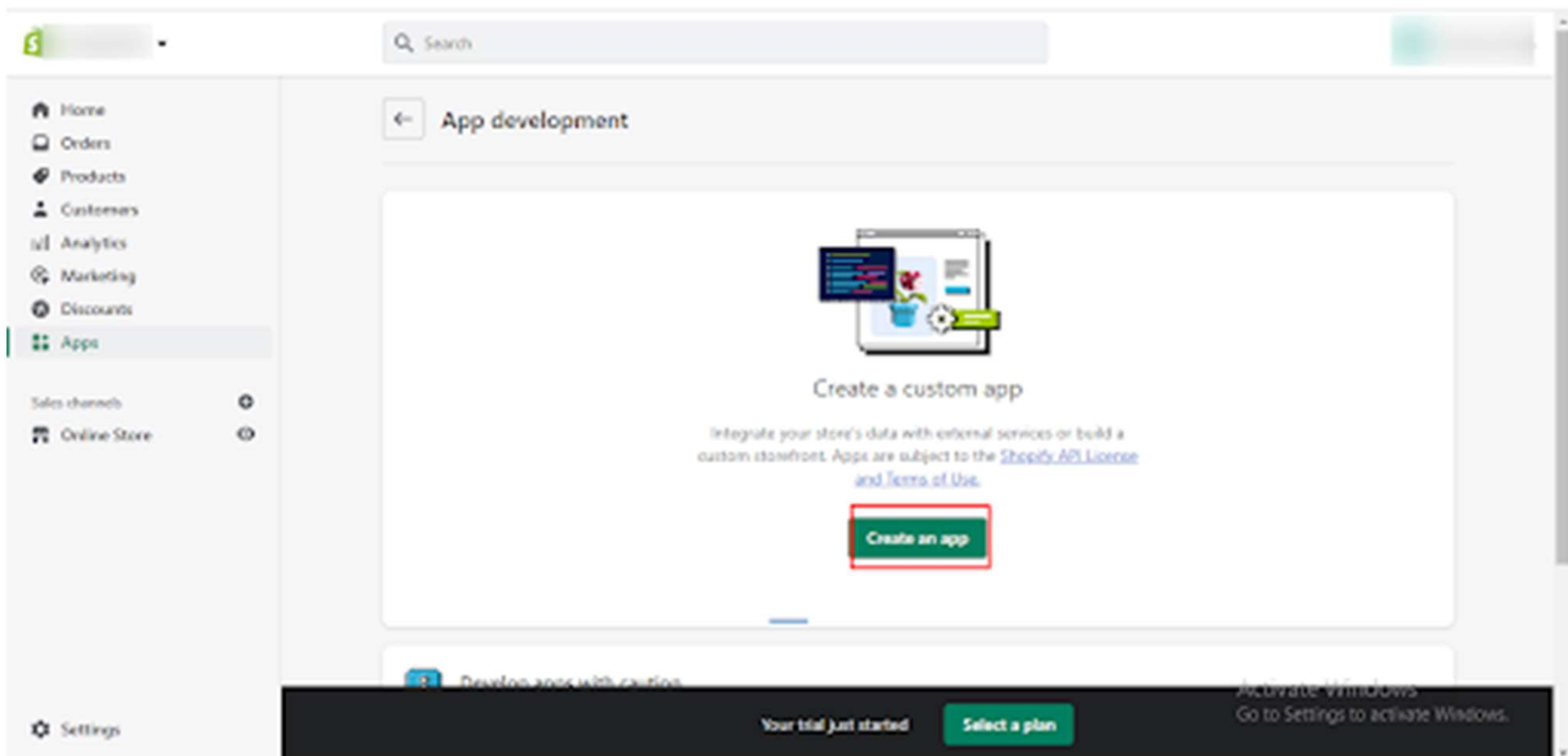


Figure – 36

- On the next page, you will need to name the app. The app developer's email address is populated by default. Fill in the app's name and click on **“Create App”**. See Figure 37 for reference.

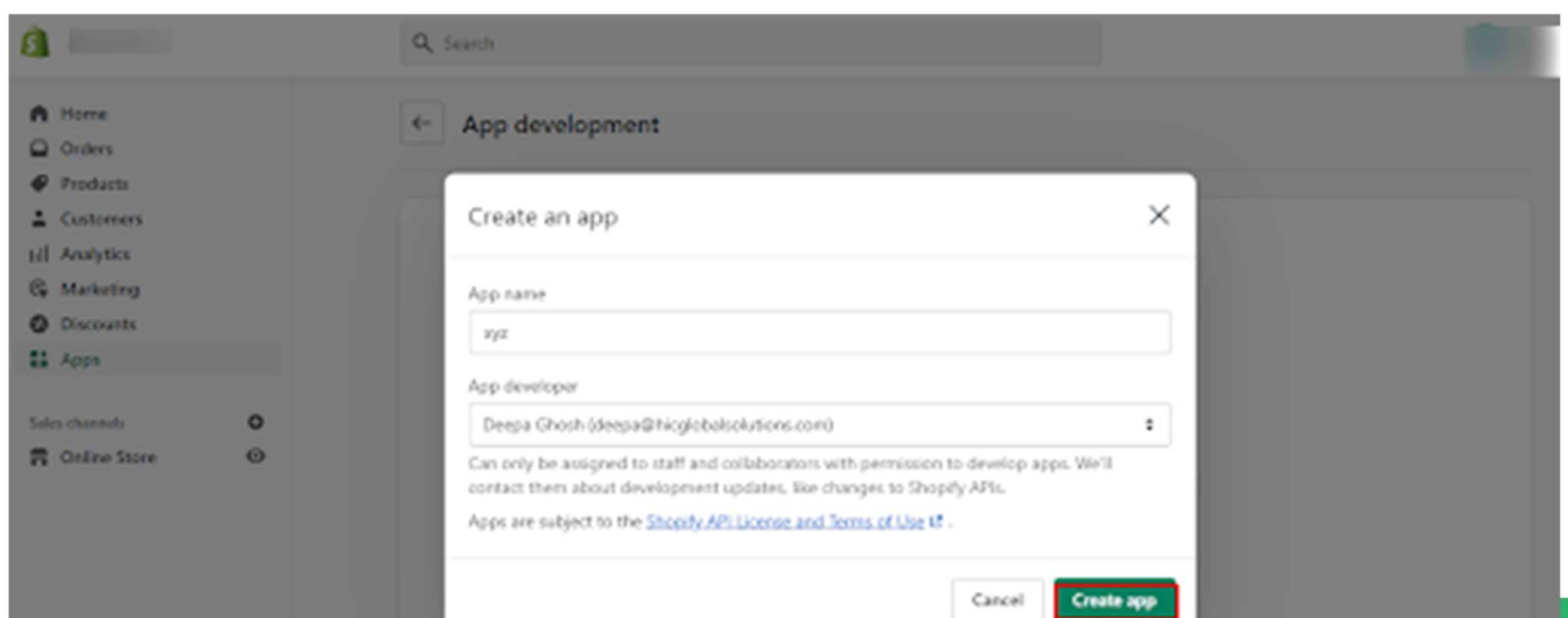


Figure – 37

- After the app is created, it is time to configure the app. Click on **Configuration** and go to **Admin API Integration** and click on “**Configure**” on the right side of the tab. Figure 38 demonstrates the steps.

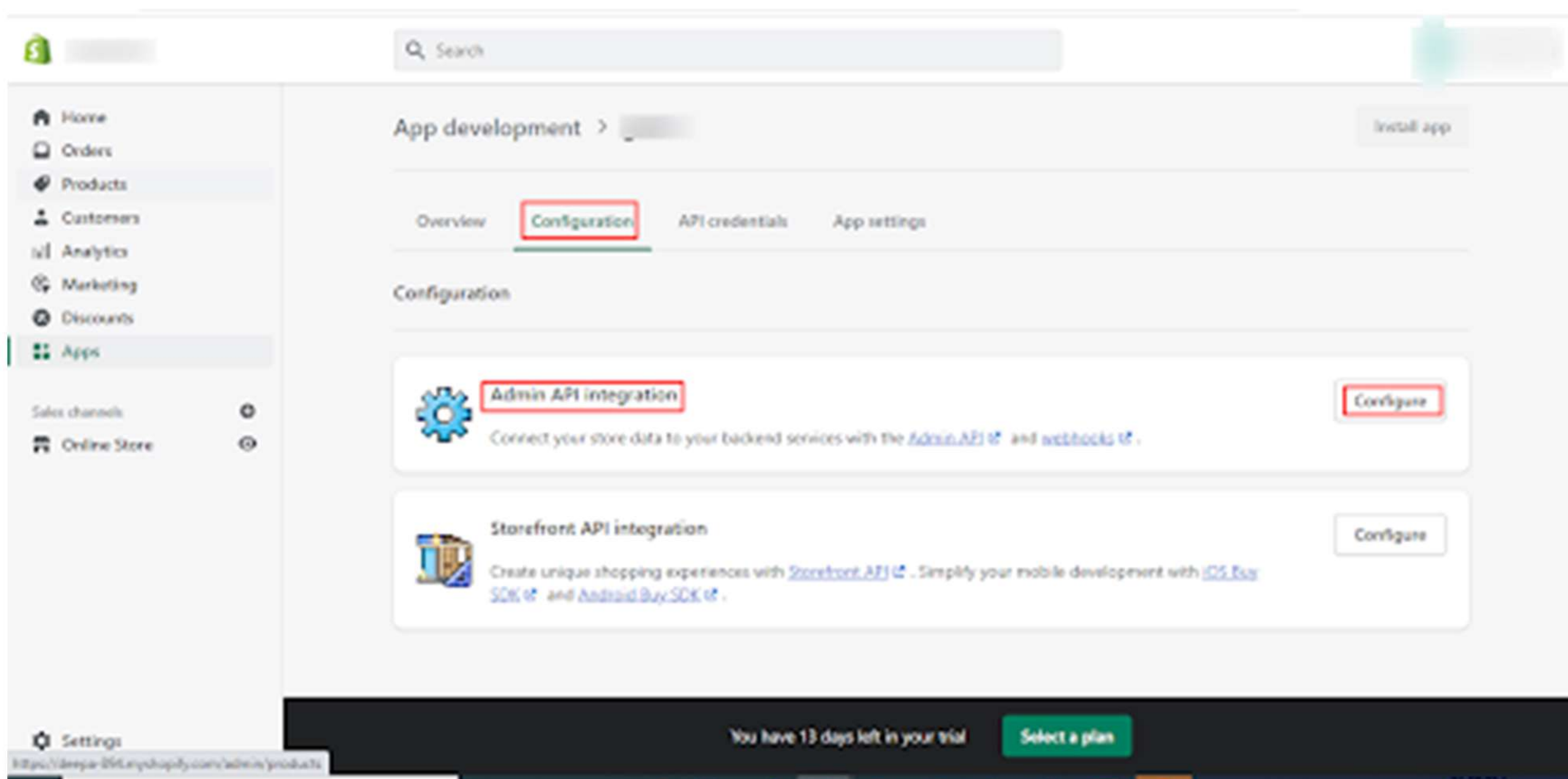


Figure – 38

- On the API Admin Integration page, get access to data with the Admin API. You can select the scopes that your app needs. However, these mandatory scopes must be given access for the proper functioning of the app.
 - Customers
 - Location
 - Product
 - Draft Order
 - Inventory
 - Order

- Drag down the slide bar to view the access scopes and tick on both Read and Write checkbox as shown in Figure 39

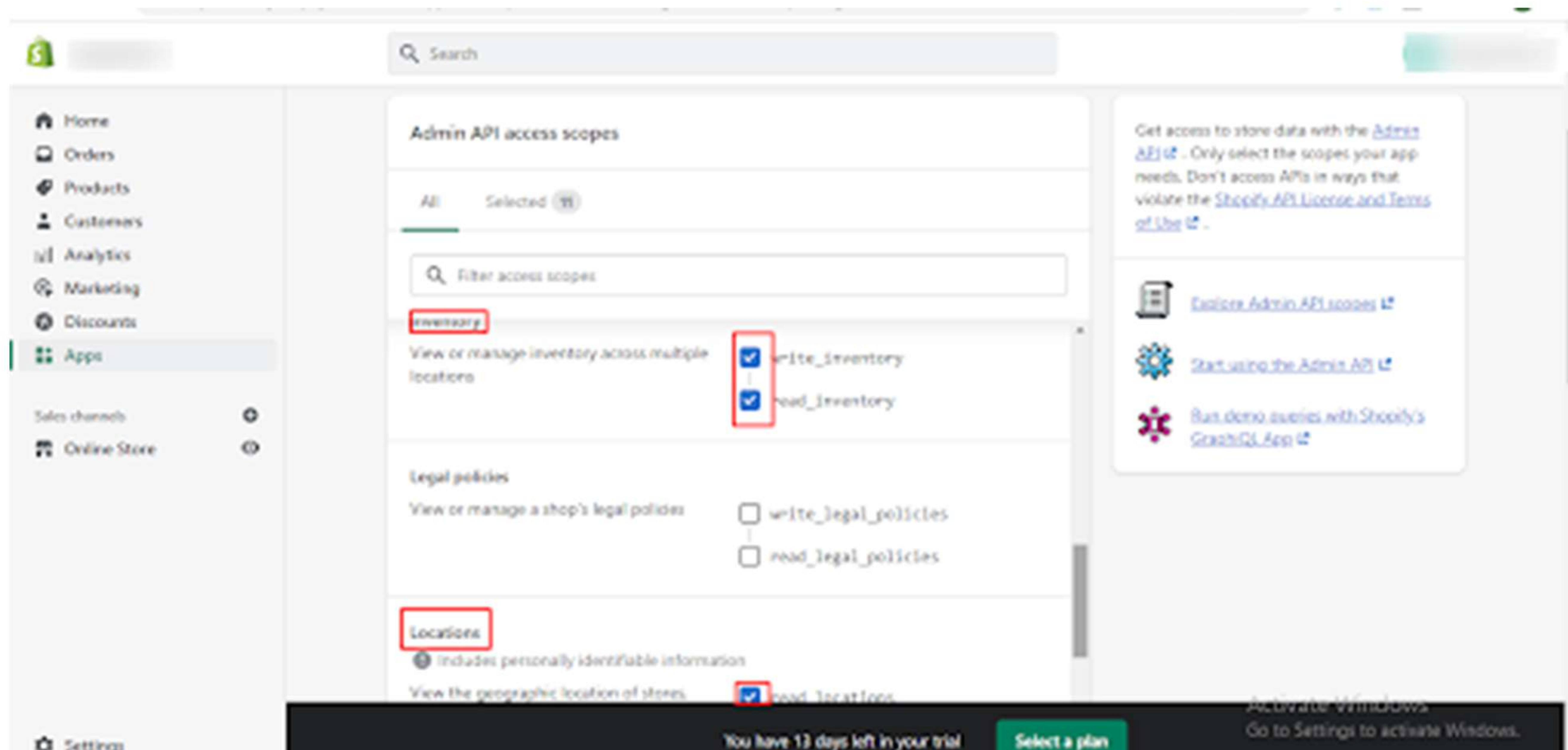


Figure – 39

- Scroll down and then click on 'Save'. Figure 40

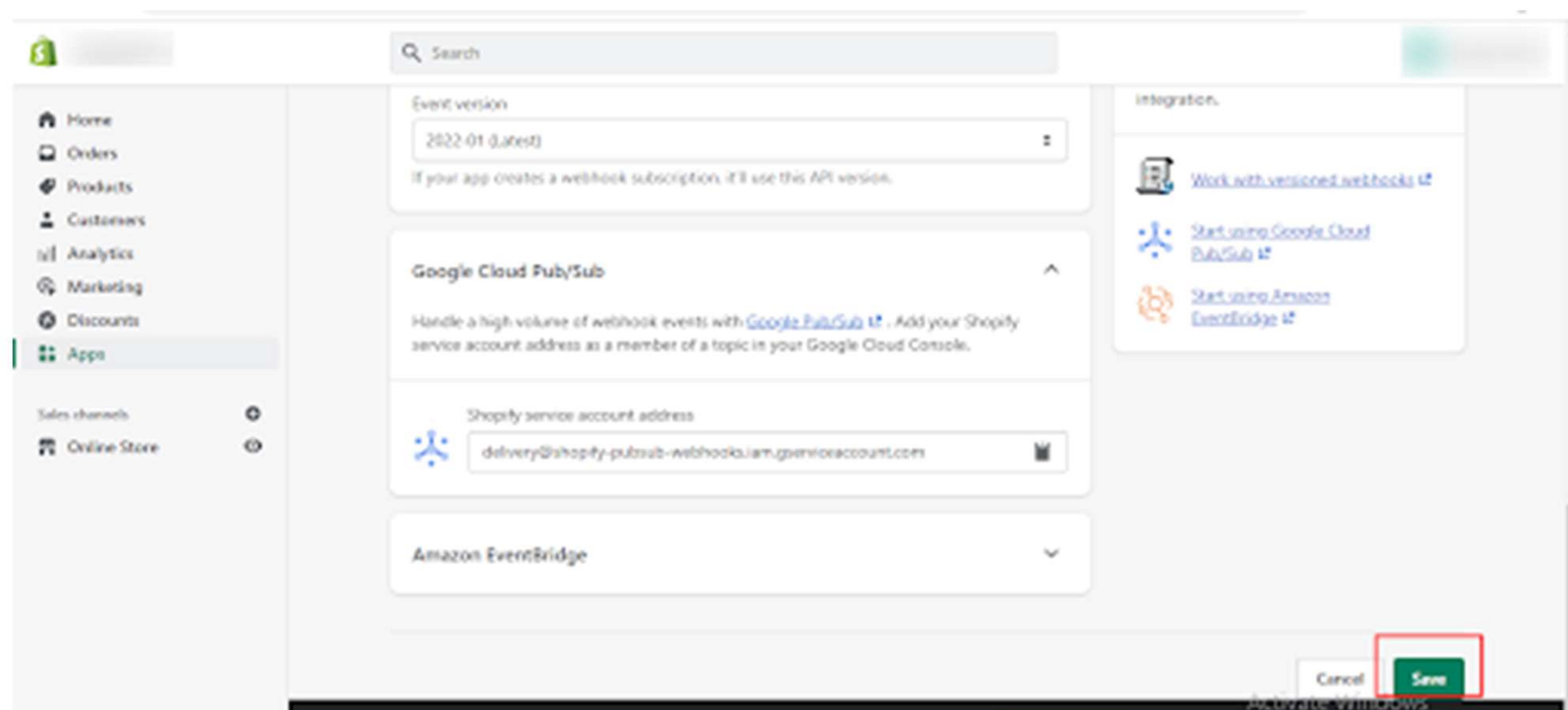


Figure – 40

- After you have saved your app configuration, Scroll up and **Go to API Credentials**. To access your API access token, you will need to install the app. Click on “Install app”. You may click on any of the install app buttons as displayed in Figure 41

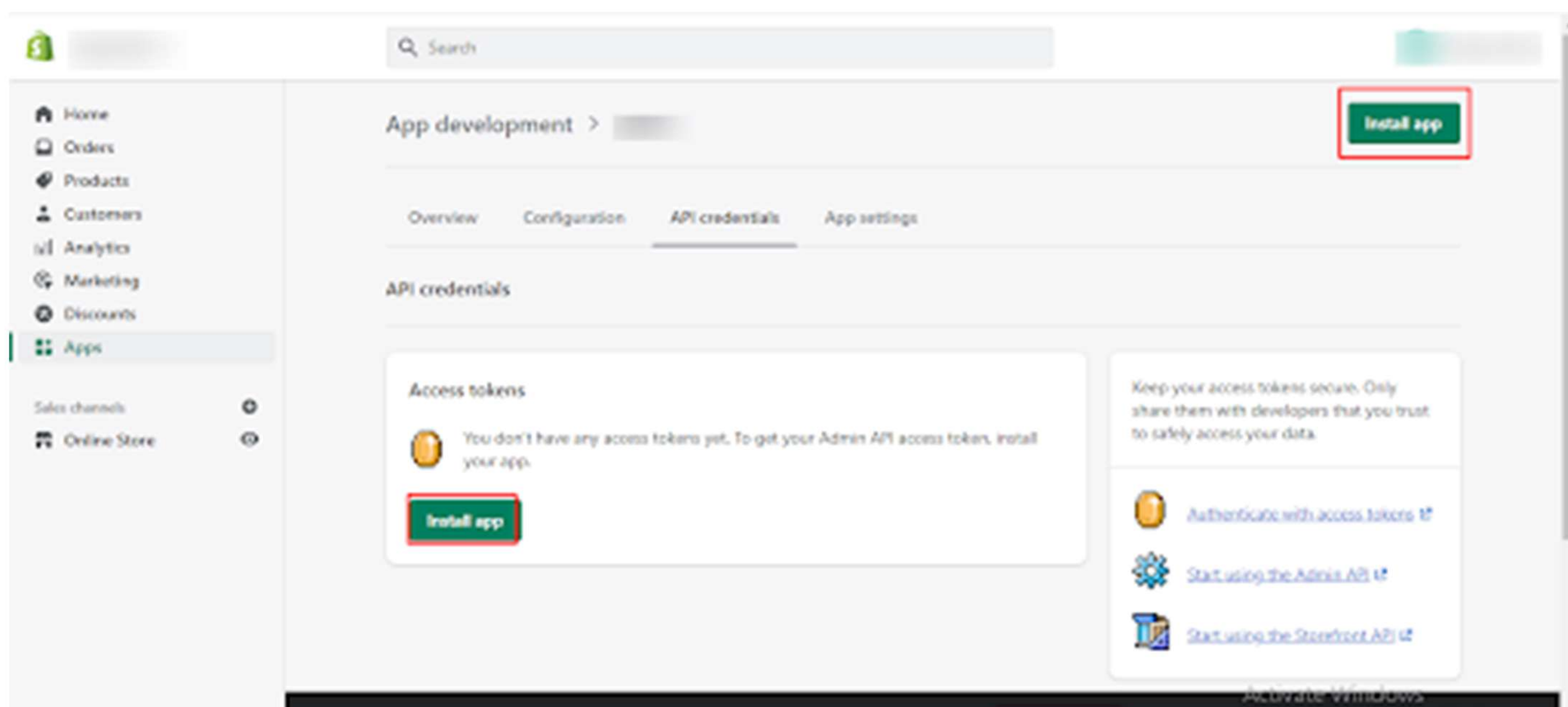


Figure – 41

- Once the confirmation window appears, click on Install to complete the app installation as shown in Figure 42

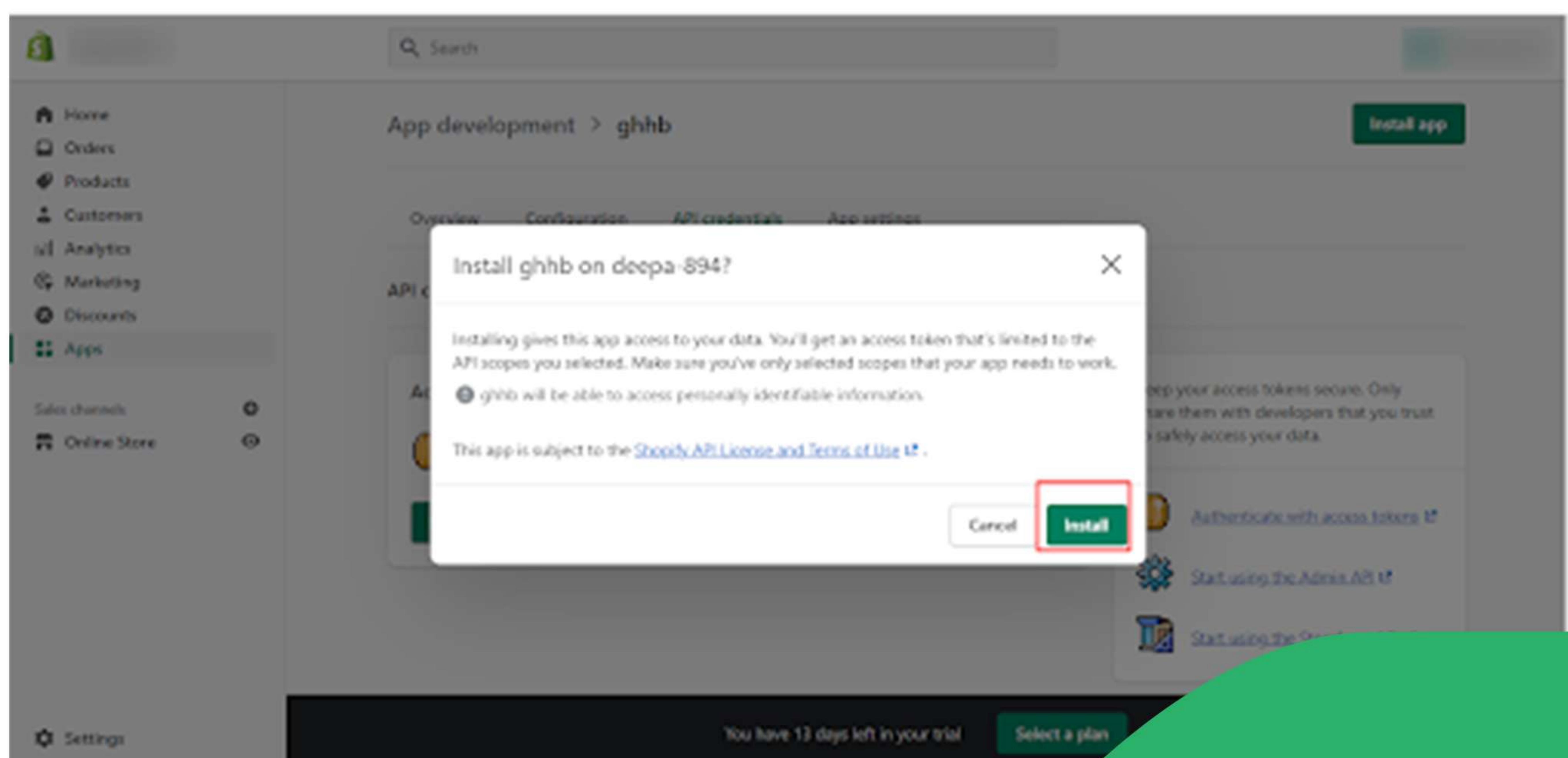


Figure – 42

- After the app is installed, you can view your Admin Shopify Access Token.
- **Please note that the Shopify access Token key can be viewed only once after revealing the token. Ensure to copy the Token key and save it in a secure place for later use.**
- To retrieve the Shopify Admin API Access Token, Click on 'Reveal Token Once.' See figure 43

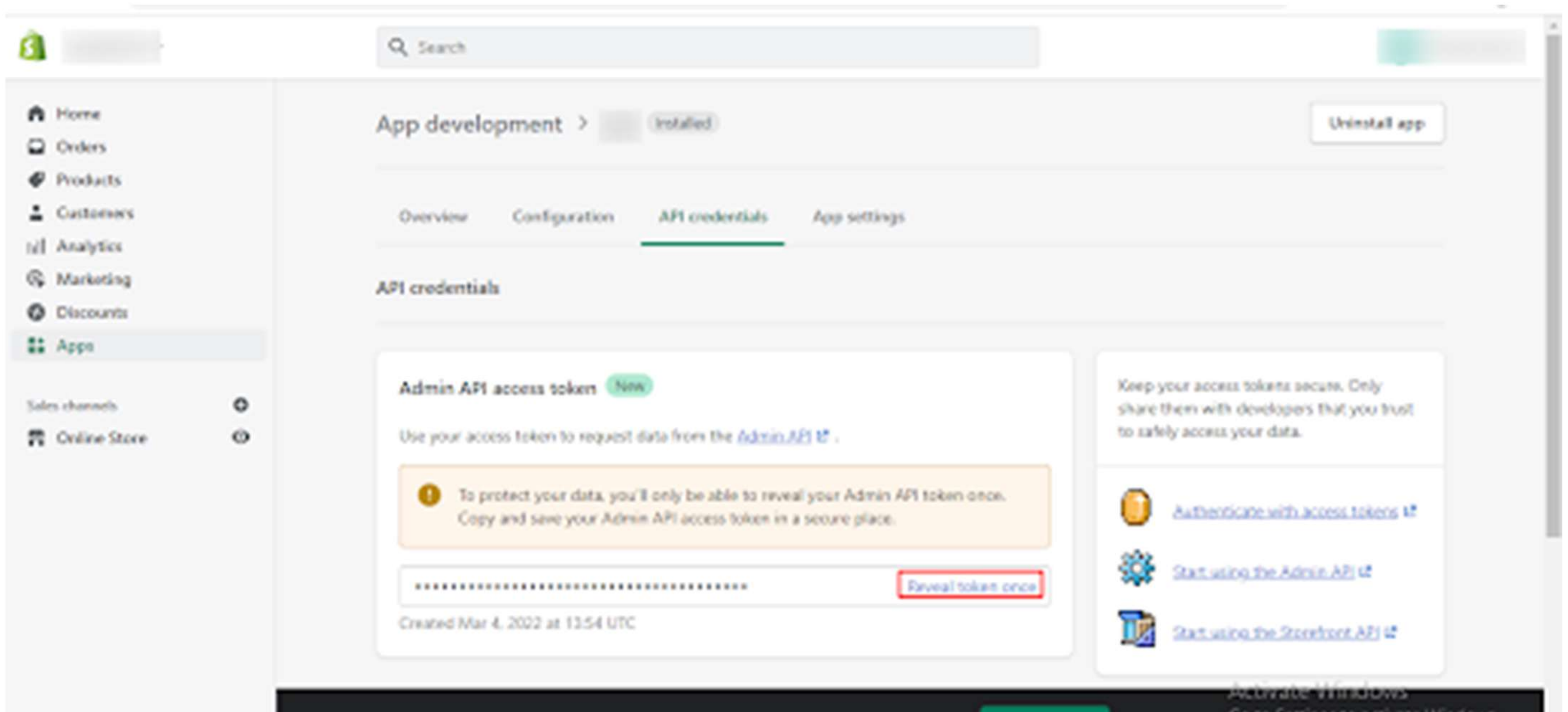


Figure - 43

- Now we have retrieved the Shopify Admin API access token and Shopify store URL, we will go back to the Salesforce Shopify sync settings page in Salesforce to complete Step 2 (Shopify Credentials).
- Back on the Shopify Credentials page, insert your Shopify Store URL and Shopify Access Token in their respective fields. Refer Figure 44

Figure - 44

- Scroll down on the same page, select email id. You can provide more than one email id by clicking the "+" button and clicking Save and Go to Next Step as in Figure 45.

Figure - 45

- This completes step 2 and you should be now on step 3.

Note: Multi-store sync functionality

- For syncing more than one Shopify store from this interface, click on ***“Having more than one store”*** in the right corner of the webpage.
- Now choose your desired store from the Multi-Control store panel to start mapping. Refer to images 46, 47 and 48 for multiple store synchronization.

The screenshot displays the 'Shopify made easy' interface for configuring a Shopify store sync. The top navigation bar includes the logo and a link to 'support.shopify.salesforcemadeeasy.com'. A progress bar at the top indicates the current step is 'Shopify Credentials'. The main form contains the following fields:

- Shopify Store URL:
- Shopify API Key:
- Private Key Password:
- Select a Pricebook:
- Default Currency:
- Select a Site URL:

A red box highlights the link 'Having more than one store?' in the top right corner of the interface.

Figure - 46

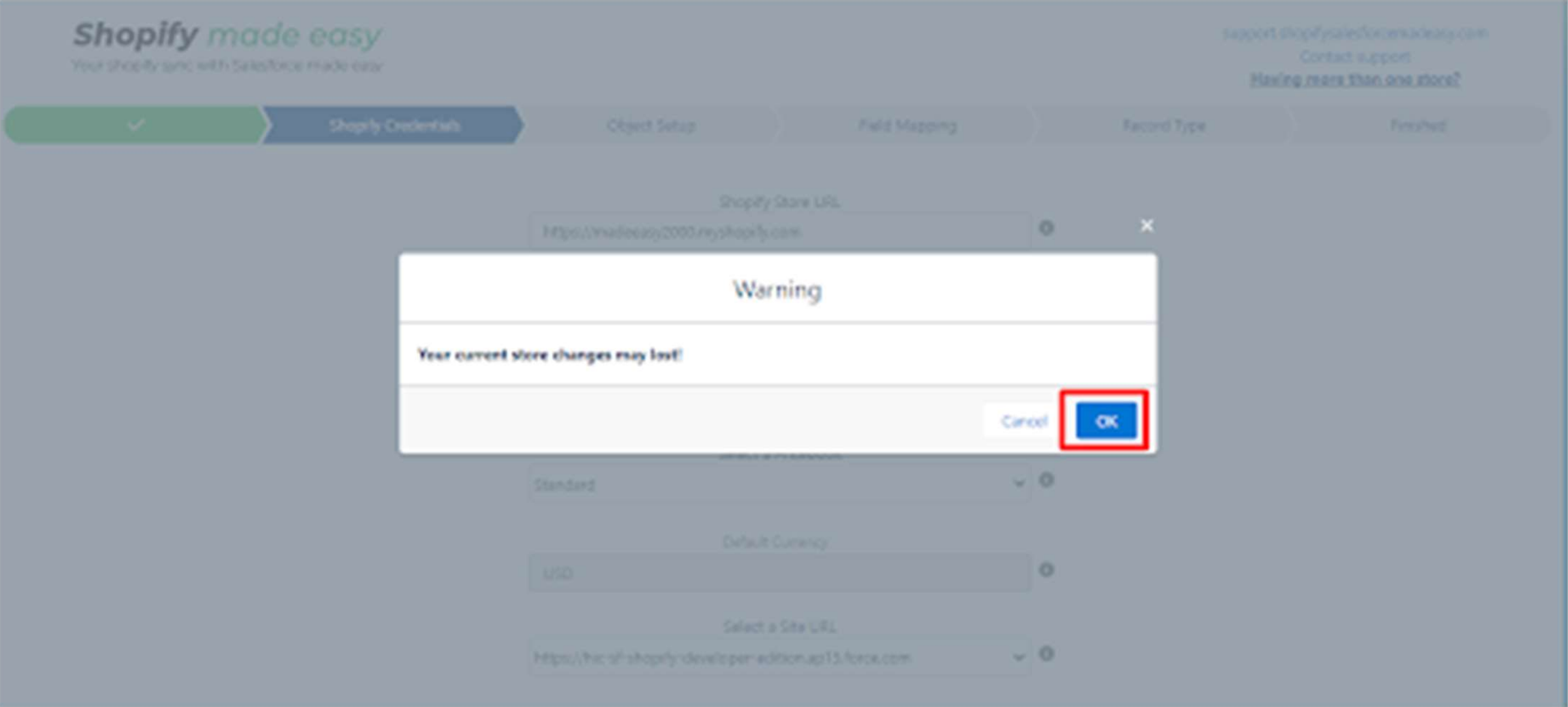


Figure - 47

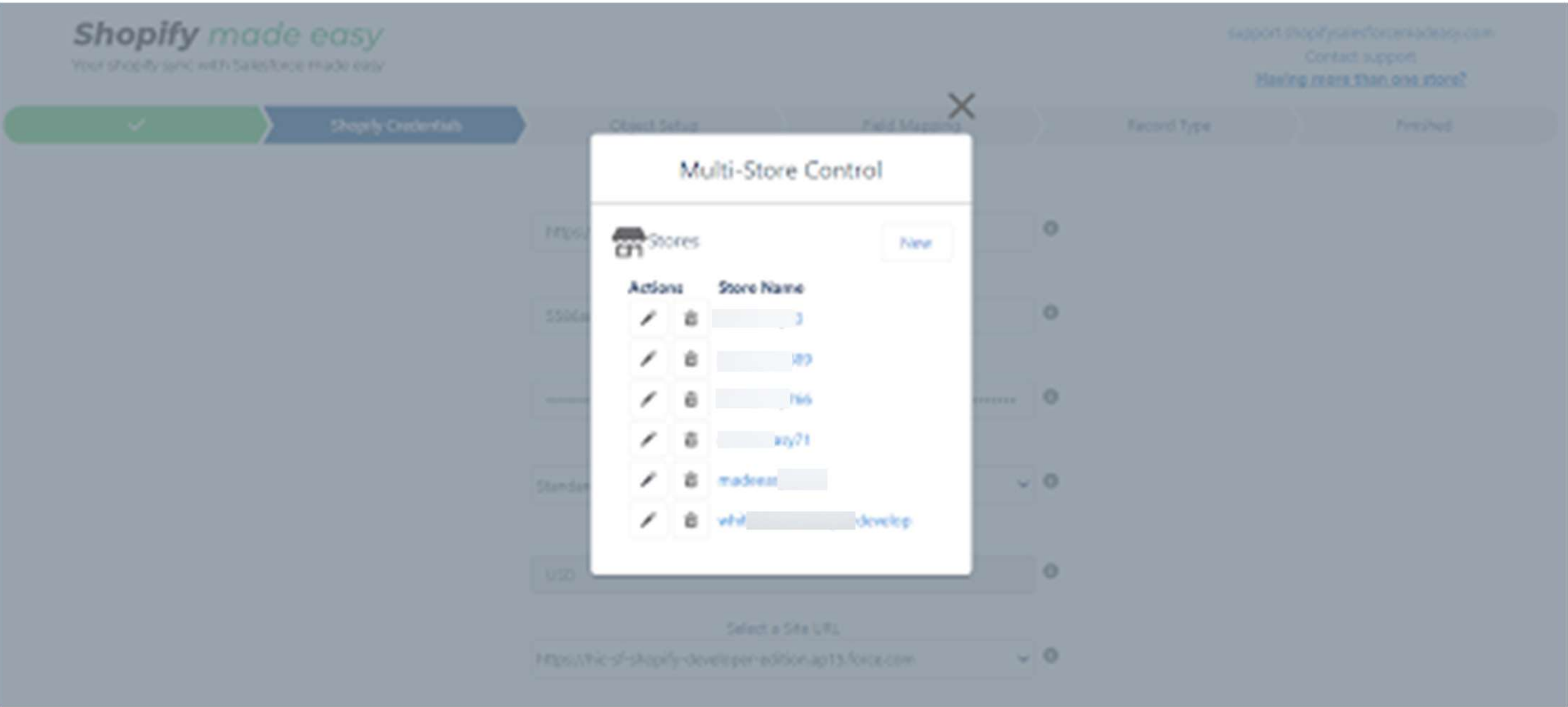


Figure - 48

- In step 3 (Object Setup), 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 49

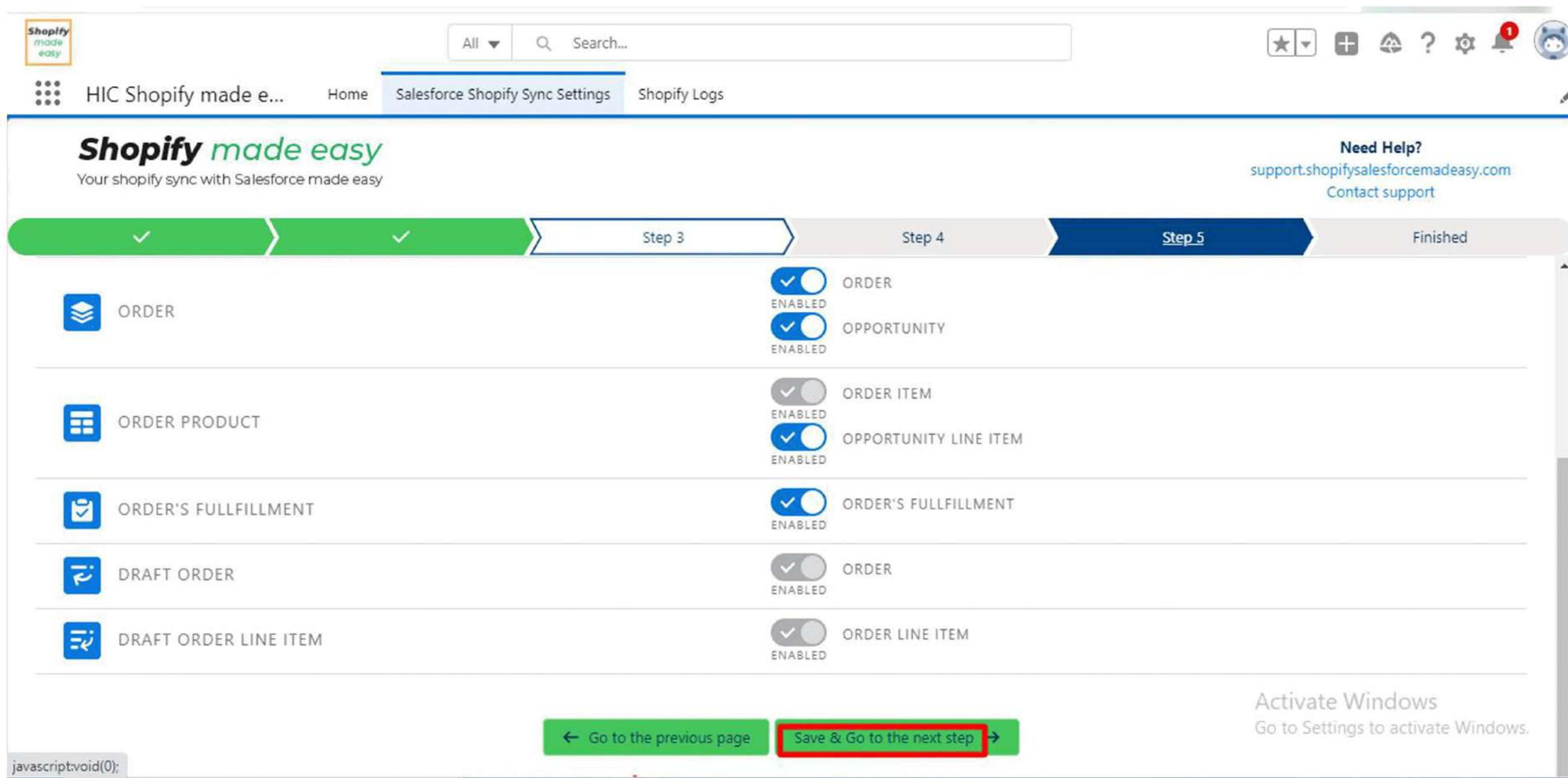


Figure - 49

- In step 4 (Field Mapping), you can choose to use the default Field Mapping. Click on Save and go to Next as in Figure 50.

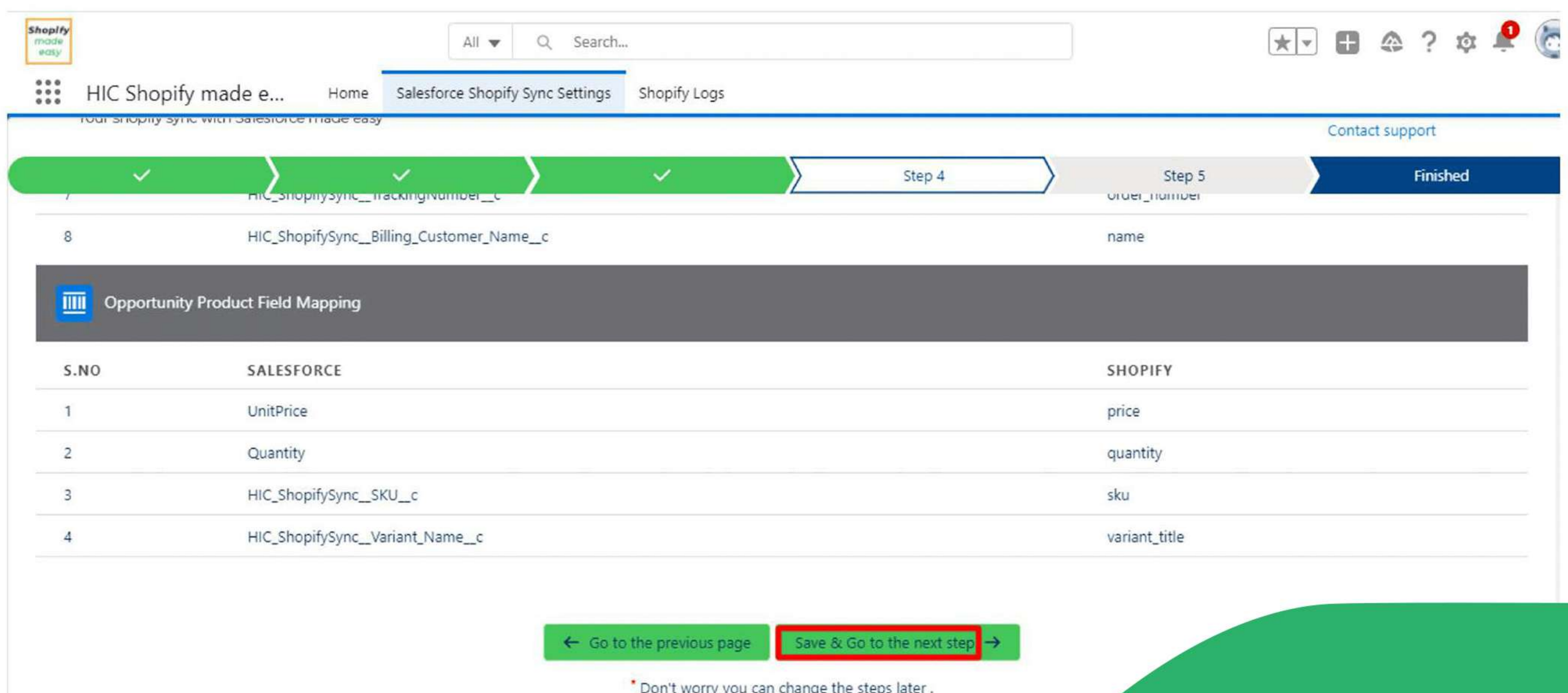


Figure - 50

- Now comes Step 5 (Record Type), You can choose the record type or can continue with the default value. Click Save and go to next as seen in figure 51.

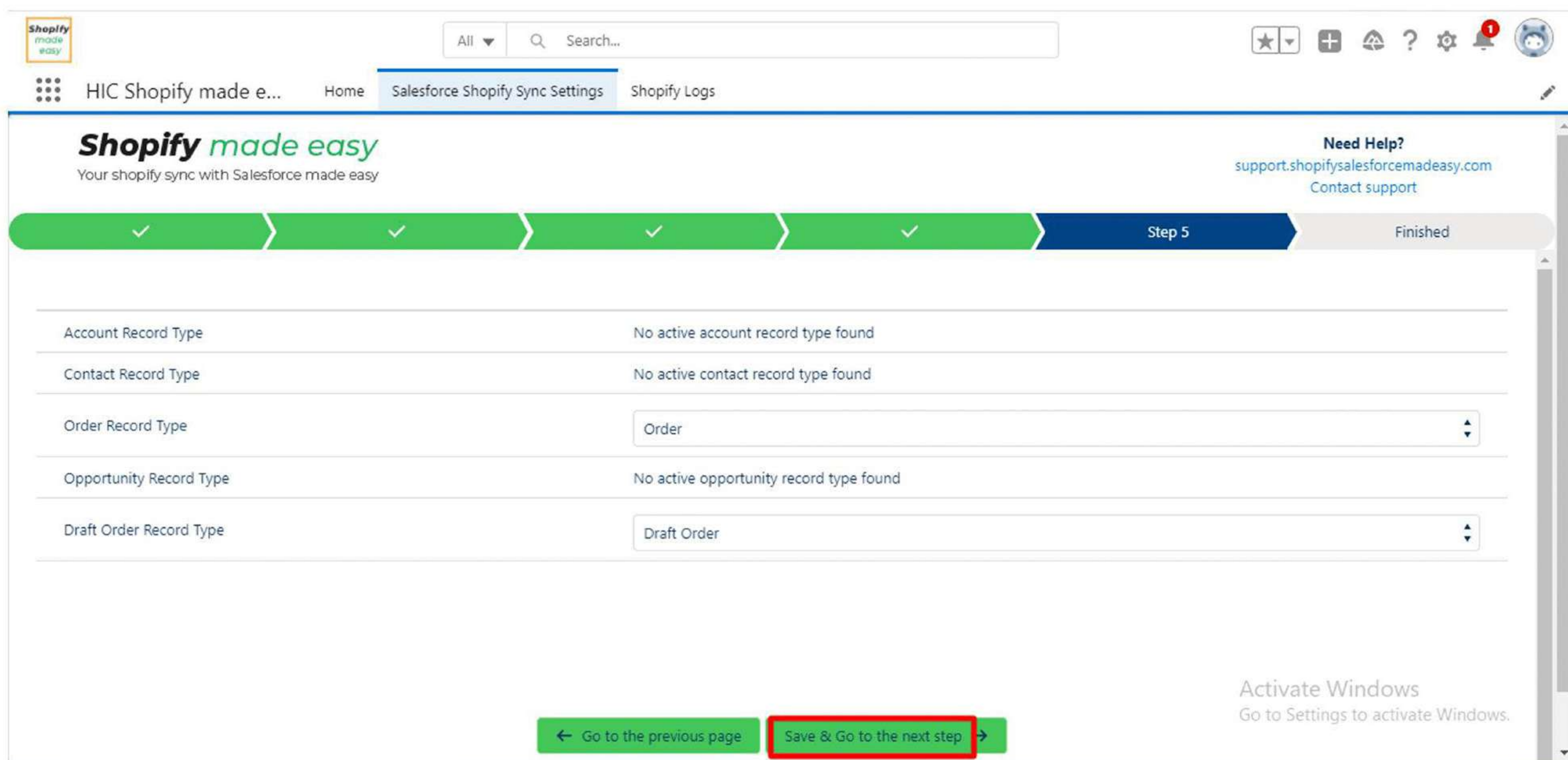


Figure – 51

- After step 5, you should be on the web page to start with the synchronization process. Click on Start sync As in figure 52.

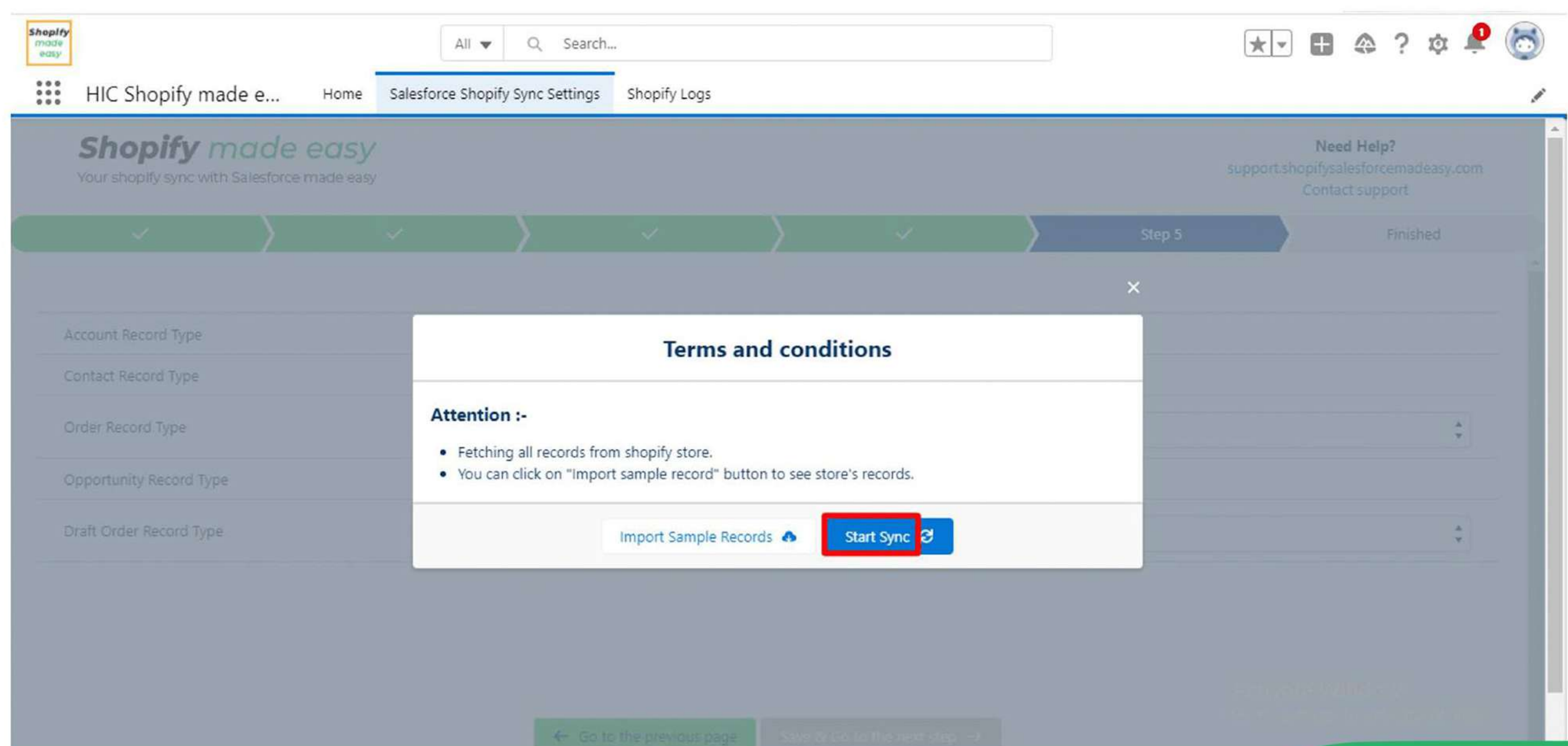


Figure – 52

Final step

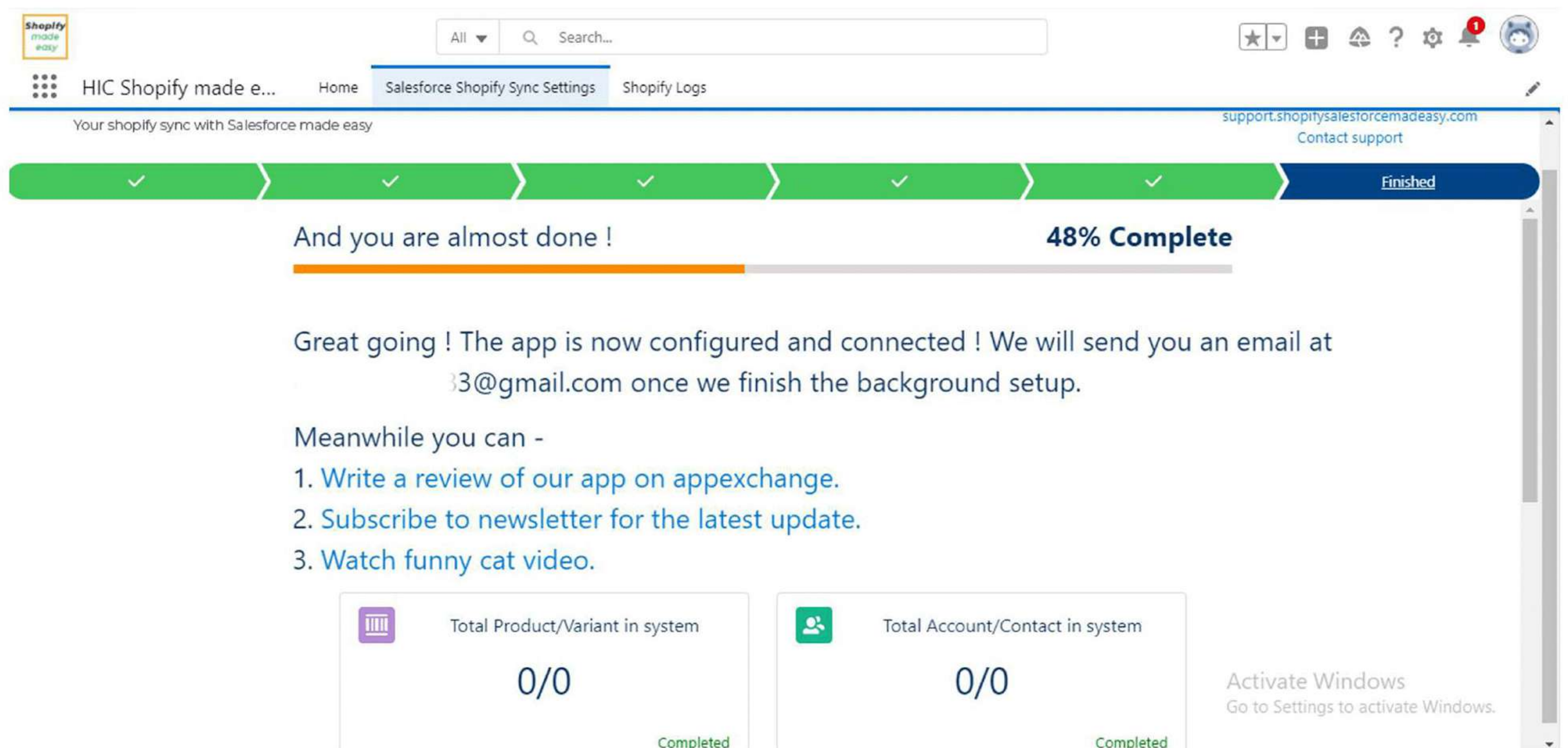


Figure – 53

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 52. Or reach out to us at support.shopifysalesforcemadeeasy.com.

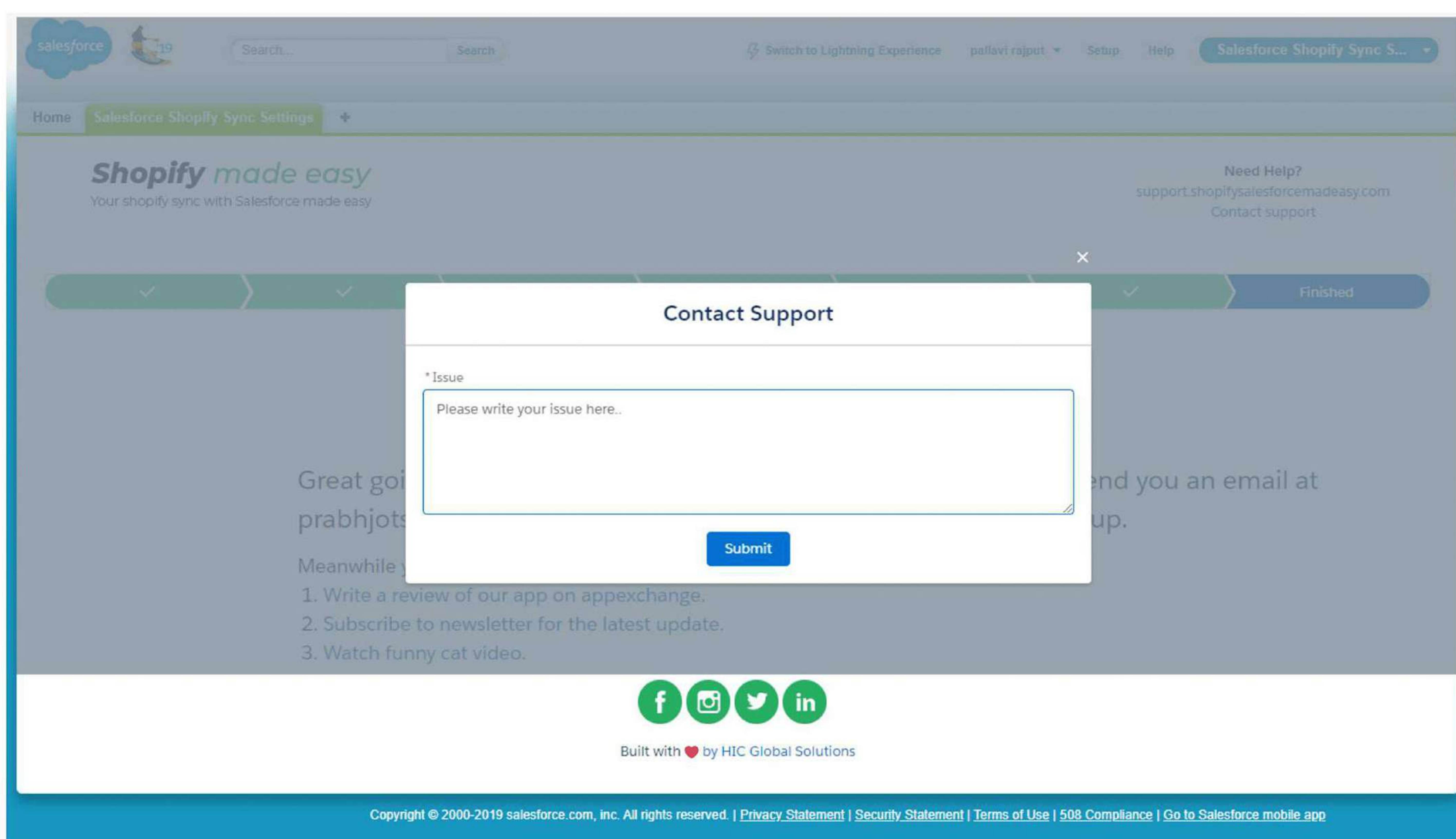


Figure – 54

Shopify Log:

You may view all the synced products, orders, variants, etc on the Shopify Log. You may use the toggle button to see the list of logs updated. Also, can download them into a CSV file.



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