

Salesforce Consulting Partner

salesforce

#### inforge.us



#### 2023

# Vend-Salesforce Connector

With **nearshore talent based in Argentina**, we provide excellent quality people to US-based companies at **competitive prices**, sometimes 80% less than US equivalents.

Our teams are in the same timezone as the US facilitating **communication and collaboration in real time.** 

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Hallandale Beach, FL 33009

## ABOUT INFORGE

## **OUR MISSION**

We accelerate businesses' growth by surfacing key information and automating processes.

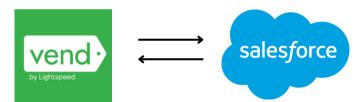


Expert Salesforce Architects & Developers.

Competitive rates with nearshore developers.

Company based in Florida.

#### BACKGROUND



Vend is a Point of Sale system. It was acquired at the Boca Raton Museum of Art for use at the museum's gift shop.

Inforge developed a connector in order to:



Have real-time store sales information in Salesforce (reporting, finance...).



Give member-based discounts at the store automatically by getting the member information in real time from Salesforce.





## COMMUNICATION - WEBHOOKS

### **VEND TO SALESFORCE**

In order to get the data in real-time in Salesforce we need to use webhooks. The following was done:



• Create **Apex Web Services** in order to capture the HTTP • requests coming from Vend.



Since the Apex Web Services need authentication by default, Salesforce Sites had to be created to **make the web services public.** 



**Created the webhooks in Vend** so Vend could make HTTP requests to Salesforce for every new Sale, Product, Customer, or Inventory change.

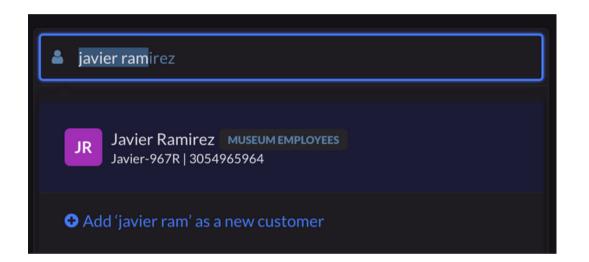
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	Webhooks are a way for	Webhooks are a way for integrators to react to events that occur in Lightspeed Retail. <u>Need help?</u> 🗗			Save	Cancel	
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	Туре						
	<ul> <li>Sale Updated</li> <li>Fired when sales are created</li> </ul>	ited or updated		Product Updated Fired when products are created or updated	1		
	Customer Updated	e created or updated		Inventory Updated Fired when inventory changes occur			
	Register Closure Cro			Register Closure Updated Fired when existing register closures are upo	dated		
	Consignment Sent Fired when a consignment	it is sent		Consignment Received Fired when a consignment is received			





### **SALESFORCE TO VEND**

**Real-time data regarding museum members is needed at the store.** For every membership change, an Apex Trigger in Contact makes an HTTP request to vend in order to update the Customer information.









## CONTROL PANEL - LWC

#### A Lightning Web Component was developed in order to:



See connector status.

Ð

Manage synchronization preferences.





See Request Logs.

be able to reprocess them in case of an error (this was achieved with a Flow calling an Apex class with an Invocable Method).

		POS APP				
		POS App options	General Settings			
		Ceneral Settings	General Settings			
		Contacts	Integration Status			
		_				
		Products	Enabled			
		3 Sales				
		Error Logs				
		Request Logs	Check Endpoints status			
			Contacts Bridge Status Products Bridge Status Sales Bridge Status Sales Bridge Status			
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### **OPPORTUNITIES**

For every Sale, an Opportunity is created with full detail of products, pricing, taxes, and discounts.

Opportunity Anonymous Buyer POS Sale 2022-12-	-05	+ Follow Edit New Note	Delete Clone	Change Owner Change Record	Type Sharing	Sharing Hierarchy	Printable View			
Amount Close Date Stage \$59.92 12/05/2022 Closed Won	Relating To Opportunity									
Related List Quick Links 0	Related List Quick Links 💿									
Contact Roles (1) Products (5)	C Account Soft Credits (0) Payments (	1) GAU Allocations (2)	GL Records (3)	Notes (0)	Files (0)					
Stage History (2) Approval History (0)	Extra Membership     Cardholders (0)									
Products (5)						Add Products	Edit Products 💌			
Product	Quantity	Total Price		POS St	rtus					
Sales Tax	1.00	\$3.92					V			
Loqi Zip - Hokusai Mountains	1.00	\$14.00		purchas	ed					
Loqi Bag - Waterlilies	1.00	\$14.00		purchas	ed		V			
Loqi Bag - Starry	1.00	\$14.00		purchas	ed					
Logi Bag - Almond Blossom	1.00	\$14.00		purchas	ed					

GAU Allocations (2)				
1-2110 GAU Allocation Na General Accountin Amount:	Store Sales Tax	•		
GAU Allocation Na General Accountin	1-4200-110-10000-2-10           GAU Allocation Na         ALL-647247           General Accountin         Store Sale           Amount:         \$25.00			
	View All			
Payments (1)	Payments (1)			
PMT-658722 Check/Reference Paid: Payment Date:				
View All				





### CONTACTS

The synchronization of contacts works bi-directional. Any update on vend customers will cause an update on contacts on Salesforce and viceversa.

Membership information is updated real-time in vend.

	Museun	Javier Ramir		
Account Balanc \$0.00 On Account limit available:		Loyalty \$0.00		ore Credit 60.00
Customer Details Customer Info	Store Credit	Notes on Custome	er	
Code Contact Info	Javier	-967R		
Phone Email Physical address Postal address	jramir 3801 S	265964 ez@bocamuseum.org So. Ocean Drive, FL, U vood, 33019, US		





## PRODUCTS



- All the product information is updated in real-time in Salesforce.
- Within the product record, you can see the current inventory, the supplier price, and the list price.

✓ POS	
POS ld	POS Inventory
46c67ba8-51a3-4dfc-a659-9485c92199b2	4
POS Brand	POS IsActive
POS Price	POS Product Type
14.00	Inventory
POS Sku	POS Supplier
3-207233	Th oup
	POS Supplier Price 7.00

### **INVENTORY TRANSACTIONS**

This was a special requirement from the Finance department. They need a record of all the inventory changes including increases and decreases.

		Inventory Transactions					New Import	Change Owner P
50+ ite	ms • S	Sorted by Created Date • Filtered by All pos in	ventory transactions • Updated hace un minuto				Q. Search this list	\$ • III • C'
		POS Inventory Transaction Name $~~$	Product	Count	V Old count V	Status 🗸	Created Date ↓	✓ Attributed Cos
10		a3G4P000000Whza	Soap - Andy Warhol	3	5	Decrease	12/07/2022, 2:27 PM	1.66
11		a3G4P000000Whzf	Thinking Putty 2"	329	330	Decrease	12/07/2022, 2:27 PM	2.00
12		a3G4P000000Whzk	Map Luggage Tag	19	20	Decrease	12/07/2022, 2:27 PM	2.75
13		a3G4P000000WhzQ	ER Aja	0	1	Decrease	12/07/2022, 2:15 PM	24.50
14		a3G4P000000WhzL	PURSE VENEZIA	4	5	Decrease	12/07/2022, 2:11 PM	64.00
15		a3G4P000000WhzG	BRMA BENDY PENCILS	319	320	Decrease	12/07/2022, 2:08 PM	1.25
16		a3G4P000000WhzB	Dali Sock (Large)	4	5	Decrease	12/07/2022, 1:53 PM	4.70
17		a3G4P000000Whz6	HG NK #33	0	1	Decrease	12/07/2022, 1:32 PM	0.00
18		a3G4P000000Whz1	ORIGIN ER	29	30	Decrease	12/07/2022, 12:45 PM	8.93
19		a3G4P000000Whyw	Madras Bowl (Medium)	0	0	Increase	12/07/2022, 10:36 AM	14.65
20		a3G4P000000Whyr	Madras Bowl (Medium)	0	2	Decrease	12/07/2022, 10:36 AM	14.65
21		a3G4P000000Whym	Tree of Life Notecards	1	2	Decrease	12/07/2022, 10:36 AM	6.50
22		a3G4P000000WhyS	L&L Placemats	36	38	Decrease	12/07/2022, 10:36 AM	6.90









# This presentation was created with the permission of the Boca Raton Museum of Art.



"Inforge pairs in-depth technical knowledge and keen analytical skills to listen to your business requirements and provide timely solutions that meet your goals.

They are collaborative, creative, and vital members of our team."



James May Chief of Staff

With **nearshore talent based in Argentina**, we provide excellent quality people to US-based companies at **competitive prices**, sometimes 80% less than US equivalents.

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