

Edge/Shopify Integration

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Overview

The Edge/Shopify integration utilizes the **Edge Connector (ECon)** application to synchronize the two platforms. Once setup, there is an option to specify how often the synchronizations should occur. The default is every 15 minutes.

This integration is available in two configurations:

	Activation Fee	Shopify App	Virtual Web Store
Inventory Only	\$750	\$95/month	Not required
Inventory / Customer / Sales	\$750	\$95/month	\$500/year

It supports the following:

Inventory

- Items and images can be uploaded from Edge
 - Changes made in Edge can be automatically uploaded as often as you want
 - Supports individually priced items as well as bulk (UPC only)
 - Individually priced items can be linked and managed via vendor/vendor style instead of SKU
 - Sold items automatically removed OR have their quantity reduced
- Product Types, Collections, and Tags synchronize between Shopify and Edge

Customers

- Customers can be uploaded and downloaded from Shopify
- Customers can be set to synchronize between Edge and Shopify
 - Ability to select which customers synchronize
 - Customers who make sales on Shopify are automatically synchronized
 - Changes to address/email/phone flow both ways

Sales

- Web Sales can be automatically downloaded and imported to Edge
 - Downloaded sales are placed in queue at POS for processing; they do not process automatically
- When downloading Web sales, Edge automatically tries to match the customer's email
 - If a match, customer will automatically be linked to existing Edge customer record
 - If no match, customer will be added as new to Edge
- Non-Edge items are also supported and will import as a miscellaneous charge
- Edge transactions do NOT upload to Shopify

Not Supported

- No third-party Shopify apps currently integrate with Edge
- No Wish List support
- No Service Job lookup support

Getting Started

The **ECon – Shopify** integration can be set up either with a brand new Shopify store or linked to an existing store. Though data flow is bi-directional, it is **strongly** recommended that you use The Edge as your central hub for managing item data and images. We cannot guarantee that changes made exclusively on Shopify will not be lost.

Note: We do not provide Shopify training. For help developing your Shopify site or managing the Shopify backend please refer to Shopify’s resources or consider hiring a consultant.

If you are integrating an existing store, there are some important considerations. **PLEASE READ CAREFULLY**

- ECon utilizes the **SKU** field on Shopify product pages to link Edge items to Shopify products. If you have been manually populating this field with Edge item numbers, then when the synchronization occurs the Edge is going to take over managing these items which will overwrite your existing product pages and images.
- In addition to checking for item numbers, ECon also checks the **SKU** field for vendor/vendor style combinations that match Edge items. If it matches then it will assume it is a linked item and will take over managing it.
- If you are utilizing the **SKU** field in any other way we cannot guarantee that the integration will not inadvertently lead to Shopify products being overwritten or deleted when it synchronizes.
- We **strongly** recommend setting up a separate test store to try the integration before attempting to link it to your existing live store. Shopify provides directions for backing up and duplicating your current store: <https://help.shopify.com/en/manual/shopify-admin/duplicate-store>
- Ultimately, retrofitting the integration onto an existing store is a much more difficult proposition than starting from scratch with a brand new Shopify store.

Launch Steps

Step 1 – Getting Items Web Ready

Before you can begin, you will need to take the time to get your items web ready. This means the item should have one or more quality pictures on the item’s **General** tab and the **Web Title** and **Web Description** should be filled out on the **Website** tab.

The process of getting items web ready can be labor intensive depending on how you have been utilizing the software previously. It is likely there will be a lot of initial work and then, going forward on new merchandise, you can have procedures in place to ensure the **Website** tab is being filled out as part of inventory entry.

The Edge does let you determine which items get uploaded to Shopify. There are category and vendor filters that can be used to exclude items. Every item record also features a ‘Never Upload’ flag that can be set.

If you have a significant amount of work and no items ready, you may consider flagging your entire inventory as 'Never Upload' and then, as part of your workflow, when the item is officially web-ready you can uncheck the box.

It is not necessary to have your entire inventory web ready before moving forward to the next step, but you should have a plan in place.

Step 2 – Integration Setup

We schedule an appointment with you to set up the integration. These setups are only done via scheduled appointment.

Once the integration is setup, we typically will complete your first full upload. Thereafter, the automatic synchronization is activated at an interval of your choosing (default: every 15 minutes).

If you prefer, there is also the option to leave the auto-sync off and manually perform synchronizations so you can actively monitor what data is being sent back and forth in a more controlled manner.

Step 3 – Customers/Web Sales

For stores that have chosen to also synchronize customers and web sales, this setup is completed last. Typically, we want to ensure that the inventory sync is working before turning this feature on and that you are happy with the way product is flowing back and forth.

Note that web sales require a web store license and a dedicated workstation to process the downloaded sales. Web sales are not automatically imported, but rather downloaded into a queue for processing at POS.

Configuration

Setup and initial configuration is performed by our Support Team, though changes can be made at any time.

After setup is performed you will have an **ECon – Config** icon on your desktop.

The following explains how to open ECon Configuration and explains the various options.

1. Run **ECon Config Mode**.
2. Select the **Shopify** integration at the top and click **Edit**.
3. On the **General** tab, the **Minutes Between Transfers Global Setting** controls how often it will automatically sync when the service is running. The default is every 15 minutes.

The screenshot shows the 'Shopify Settings' window with the 'General' tab selected. The 'Name' field is filled with 'Shopify'. At the bottom right, the 'Minutes Between Transfers Global Setting' is set to '15' and is highlighted with a red rectangular box.

4. Click on the **Item Details** tab.

Shopify Settings

General | **Item Details** | Customer

Upload Inventory when it changes

Exclude Categories

Excluded Vendors

Selected Pricing Methods

Item Pricing

UPC/SKU

Exclude Items with No Photo

Images

Upload up to Photos per Item

Image Width pixels (0 to not resize)

Overwrite Images on Update

Exclude all images

Load Web Details from Web Changes

Selected Inventory Types

Inventory

Consignment

Memo

Trade

Assembled

Built

Joined

Catalog Entry

Faux Model

Live Model

Selected Inventory Statuses

In Stock

Description Length Limit

When web title is missing

[Click here for help](#)

Upload Inventory when it changes

Whether to upload inventory changes from Edge back to Shopify. The majority of stores will want this option enabled.

Load Web Details from Web Changes

Whether to download inventory changes (Web Title, Web Description, Tags, Manual Collections) from Shopify and import them into the Edge item's Website tab.

Though this option exists, we **STRONGLY** recommend stores use The Edge as the central hub for all changes. This is because, in the event of a problem, we cannot guarantee changes made exclusively in Shopify won't be lost.

You can use the **Get Mapped Item Details** button to manually download and import all Shopify details at any time.

Exclude Categories/Vendors

Exclude these categories and/or vendors from the inventory upload.

Selected Inventory Types/Statuses

Choose what types and statuses of inventory to include.

Selected Pricing Methods

Choose which pricing methods to include.

Exclude items with no photo

If an item does not have a photo exclude it from the upload.

Images – Upload up to

How many images to upload for each item.

Image Width

Resize images to this width (0 to disable resizing).

Overwrite Images on Update

Whether to overwrite Shopify images with Edge images. This must be enabled if you want to upload images from Edge. NOTE: Images added exclusively through Shopify will be overwritten.

Exclude all images

Exclude all images from upload. Use this if you are NOT managing images through Edge.

Description Length Limit

Truncate item descriptions after this many characters (0 to disable).

When web title is missing

If web title is missing substitute this in. Web title corresponds to Shopify Product Title and is a required field.

Download Web Collections

Downloads Shopify collections; note that collections are also updated each time ECon synchronizes with Shopify. This can be useful as a one-time step during initial setup before they turn the sync on.

Get Mapped Item Details

Downloads all Shopify item details (Web Title, Web Description, Tags, Manual Collections) and imports them to Edge item's Website tab.

If 'Load Web Details from Web Changes' is enabled, this will happen automatically each time it syncs.

Though this option exists, we **STRONGLY** recommend stores use The Edge as the central hub for all changes. This is because, in the event of a problem, we cannot guarantee changes made exclusively in Shopify won't be lost.

5. Click on the **Customer** tab.

Shopify Settings

General | Item Details | **Customer**

Do Not Upload or Download Customers
 Upload All Customers w/ Emails
 Upload and Download All Customers w/ Emails
 Sync Customers with Web Site

Send Invite On Upload
 Bring Sales into The Edge
 Bring Taxes into The Edge

Customer Download Options

Check for first created matching email and phone number
 Create a New Edge Customer
 Check for first created matching Email

[Click here for help](#)

Save and Close Cancel

Do Not Upload or Download Customers	Do not download or upload customers
Upload All Customers /w Emails	Upload customers that have email addresses, but do not download them. Customer changes will not sync.
Upload and Download All Customers /w Emails	Upload and download customers that have email addresses. Customer changes will not sync.
Sync Customers with Website	Synchronize customers between Edge and Shopify. This is the option most stores will want to use and is REQUIRED if they want to process web sales. See the next section for details on how this works.
Customer Download Options	<p>When downloading customers from Shopify, choose what happens when they are imported into the Edge.</p> <p>‘Check for first created matching email and phone number’ will check against existing Edge emails and phone numbers and the first match it finds will be linked to the imported Shopify customer.</p> <p>‘Create a new Edge customer’ will not check for duplicates and always import Shopify customers as new.</p> <p>‘Check for first created matching email’ will check against existing Edge emails and the first match it finds will be linked to the imported Shopify customer.</p>

6. Click **Save and Close** to save configuration.

Sync Customers with Website

This option will keep customer contact method changes (email, phone, address) synchronized between Edge and Shopify. It is required if processing Web Sales.

Note: Shopify does not give us any indication when a customer record changes on their end. This means changes to customer records on Shopify only import under two circumstances: the customer record changes in Edge prompting it to sync again OR the customer makes a sale on Shopify.

When synchronizing customers with Shopify, the Edge does NOT automatically send all customer records up. This is intentional as most stores have a large number of customers and it isn't practical to import them all into Shopify. Instead, there are two methods by which to link an Edge customer to a Shopify customer:

Manually – Assign to Web Upload

Within Edge, customers can be manually selected to be uploaded and imported into Shopify. To do so:

1. Click **Customer > Find** and enter criteria to bring up a list of customers. We would suggest perhaps targeting top customers.

2. Right click on the list and select **Show Checkboxes**.
3. Check the desired customers, then click **Supervisor > Assign to Web Upload**.
4. The next time Edge syncs with Shopify these customers will be imported.

Note: If the option **Send Invite on Upload** is selected, any customer assigned to the web upload will also receive an email from Shopify inviting them to visit the site.

Automatically – Web Sale

When a customer makes a sale online, Shopify requires and tracks them by email. That sale is then downloaded as a Web Sale and imported into Edge.

At the time of import, Edge will check the incoming web sale/customer to see if it can find a match via email. How it matches is determined by the **Customer Download Options** setting; it can be either a combination of email then phone or just email. If a match is found, the customer is automatically linked and will now sync.

NOTE: If the **Customer Download Option** is set to 'Create a new Edge customer' then this will not occur and a new customer record will always be created on import of a Web Sale.

Bring Sales into The Edge

If enabled, sales made on Shopify will be imported into the Edge as Web Sales. This requires the purchase of a web store license. **The default web store # is 98.**

Bring Taxes into The Edge

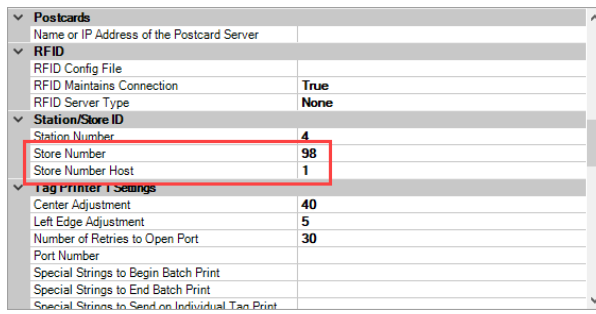
This controls whether tax is included when the web sale imports into the Edge. Shopify offers tax services where they offload tax collection and remittance for you. If you are subscribed to this then that tax amount never physically reaches any of your accounts; in this case, you would not want to bring the tax amounts back into Edge as it would double up your tax liability.

Web Sales

In order to process Web Sales, the store must be setup with a Web Store.

1. Install updated license that includes the web store (store #98 default).
2. To process web sales, the Edge must be configured to open the database as this store.

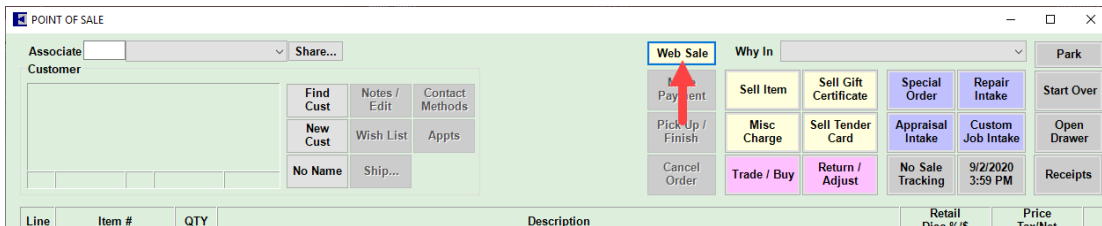
- a. In Edge config set Store Number = 98 and Store Number Host = 1



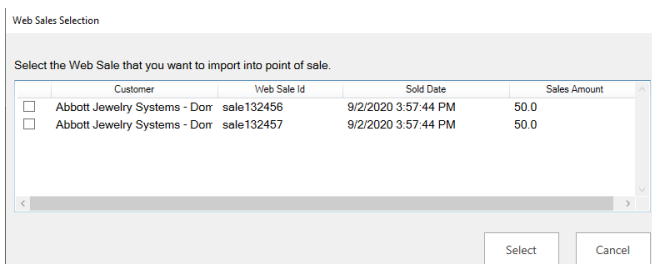
- 3. We recommend stores dedicate a PC to this but it is possible to change on the fly. If they do not want to dedicate a PC, an alternative is creating a second windows user account as config settings are saved per user, so you could have a Store 01 Windows user and a Web Store Windows user.

Processing

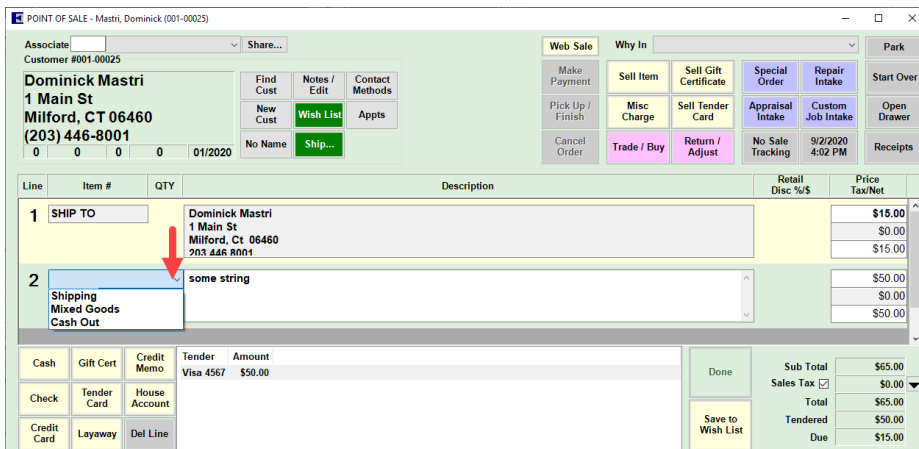
Sales made on Shopify will be automatically imported and the **Web Sale** button will be illuminated at the top of the POS window. Remember, you must be logged in as the web store (default 98) to see this.



Clicking on this button will open a window of queued sales:



Selecting the sale and clicking OK will load all the sale details. Both Edge items and non-Edge items are supported. Non-Edge items will import as **Misc Charges**.



Because this was a non-Edge item, there's a dropdown to select a **Misc Charge**. Otherwise, the item would appear here. If processing non-Edge items, it is recommended the store create a **Misc Charge** to handle these.

Edge Website Tab

Edge item records contain a **Website** tab. Note that this is only visible when a web integration is active.

The following fields integrate with Shopify:

Product Type

Edge categories are automatically uploaded into Shopify's Product type list. Additionally, any Shopify Product Types are downloaded. Both will appear in this drop-down and can be changed without changing an item's Edge category.

There are two types of collections in Shopify: Automatic and Manual.

Collections

Manual Collections are created in Shopify and items are manually assigned to this collection using the drop-down on this tab or through the Shopify interface.

Automatic Collections will NOT appear in this drop-down; instead, rules are setup within Shopify (Tags, Product Types, Price, Vendor, etc). When a product meets the conditions, it is automatically placed in the collection.

Web Title

This corresponds to the item's Product Title in Shopify.

Web Description

This corresponds to the item's description in Shopify. If this is blank in Edge, the description from the General tab will be used instead. If the option is enabled to download changes back from Shopify, description changes will only appear here, never on the General tab.

Meta Tags

This corresponds to the Tags field on Shopify. These do synchronize. Tags work with Automatic Collections to give you a way to automatically categorize inventory into Shopify collections via rules.

Always Upload This flag will cause this item to always upload to Shopify regardless of whether it matches the criteria set in the ECon Configuration. This corresponds to the **Continue selling when out of stock** checkbox in Shopify.

Never Upload This flag will cause this item to never upload to Shopify regardless of whether it matches the criteria set in the ECon Configuration. It does not appear anywhere in the Shopify interface.


Shopify Product Page

← White Stainlesssteel Chronogra Active

Title
White Stainlesssteel Chronograph Watch **Web Title**

Description

 White Stainlesssteel Chronograph Watch
Web Description

Media Add media from URL ▾
Images/Videos

Add media or drop files to upload

Inventory
 SKU (Stock Keeping Unit) **Edge Item # OR vendor/vendor style**
 Barcode (ISBN, UPC, GTIN, etc.)
 Track quantity
 Continue selling when out of stock **Always Upload flag**

Organization
 Product type **Edge Category**
 Watch - Sport
 Vendor **Edge Vendor**
 Weimar Designs

COLLECTIONS **Manual collections**

 Watches (Manual Collection) ✕

TAGS **Meta Tags** [View all tags](#)

 Watch ✕ Spring Sale ✕

Pricing
 Price **Current Price**
 Compare at price **Retail Price** ?

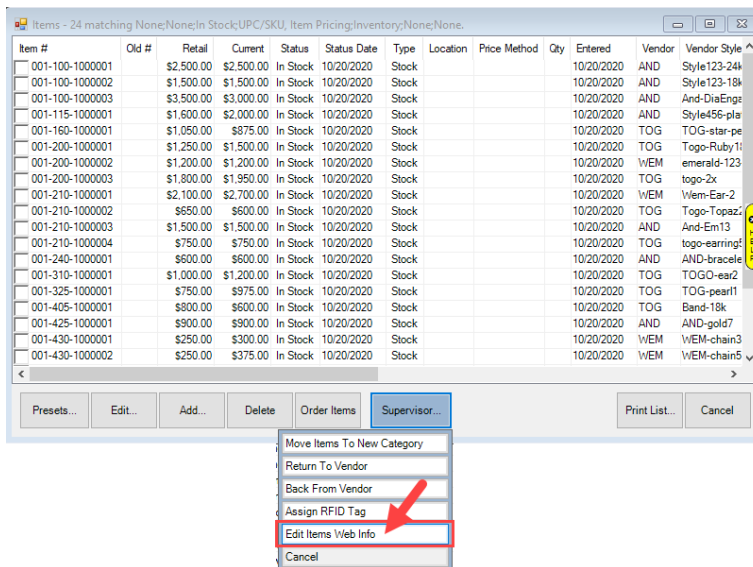
Mass Web Edit

The Edge includes a **Mass Web Edit** feature that allows you to update the Website tab of many items at once.

To use it:

1. Click **Inventory > Items > Find** and enter criteria to bring up a list of items.

2. At the bottom, click **Supervisor > Edit Items Web Info**.



3. Checkboxes will appear in the list. Check those items you wish to update, then click **Supervisor > Edit Items Web Info** again. The **Mass Web Info Edit** window will appear.

Mass Web Info Edit

Please select what values you would like to copy to the selected items.

Meta Keywords (Should be separated with commas)

Do Nothing Append Overwrite Clear All

Meta Tags (Should be separated with commas)

Do Nothing Append Overwrite Clear All

Product Type

Do Nothing Overwrite Clear All

Collections

Do Nothing Append Overwrite Clear All

Upload Flags

Do Nothing Always Upload Never Upload Clear All

Save Cancel

4. For each field, you have the option to:

Do Nothing No changes will be made.

Append Changes will be inserted at the end of existing data.

Overwrite Existing data will be cleared and new data saved in its place.

Clear All Existed data will be cleared.

5. For **Upload Flags**, you have the options to set **Always Upload**, **Never Upload**, or clear the flag.

6. Make desired changes and click **Save** to update all selected items.

Variants

Shopify supports adding **Variants** to the products you list in your store. These allow you to add options such as sizes that can be selected at the time of purchase. The Edge has **very limited** support for variants.

- Items with variants must be set as **Always Upload** in Edge. This corresponds to the **Continue selling when out of stock** option on **Shopify**.

The screenshot shows two panels from the Edge POS interface. The left panel, titled 'EDT/TPW', contains product information: 'Product Type' is 'Colored Stone Bracelets', 'Collections' is empty, 'Web Title' is 'Colored Stone Bracelet', and 'Web Description' is 'Lady's White Filigree Platinum Open Link Bracelet With 2= Fantasy Cut Blue Blue Topazs'. At the top, there are two checkboxes: 'Never Upload This Item' (unchecked) and 'Always Upload This Item' (checked, highlighted with a red box). Below the description are 'Suggest...' and 'ABC' buttons. The right panel, titled 'Inventory', shows 'SKU (Stock Keeping Unit)' as '240-1000001' and 'Barcode (ISBN, UPC, GTIN, etc.)' as an empty field. At the bottom, there are two checked checkboxes: 'Track quantity' and 'Continue selling when out of stock' (highlighted with a red box).

- This is required because Shopify tracks quantity by variant. Edge has no way to manage this.
- These items will ALWAYS be available for purchase on your site.
- When an item with a variant is sold, the sale will download back into Edge and any variant information will be appended to the item's description.
 - Example "ring" with variant size 5 would load into POS as "Ring: 5"
 - Web sale information loads into POS but can still be modified. For example, if your variant requires you to special order an item, the sale can be modified with the sold item removed and replaced with a special order intake.

Using Variants

To enable **Variants** for an item:

1. In Edge, go to **Inventory > Item > Find**.
2. Enter criteria to find your item and **Edit** it.
3. Click on the **Website** tab and check the **Always Upload** flag.
4. Next, log into Shopify and look up the item's Product Page.
5. Verify that **Continue selling when out of stock** is checked.
6. Create your variants.