Shopify Integration for Magento - User Manual

by CedCommerce Products Documentation

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1. Overview

To make your selling experience more lucrative and comprehensive, CedCommerce presents to you the Shopify Integration for Magento. With this innovative extension, now the sellers can feature and sell their products from Magento store to Shopify store. Once the products get exported to the Shopify store, the products can be sold from their and all the necessary actions can be taken for the products.

Key Features of the Extension:

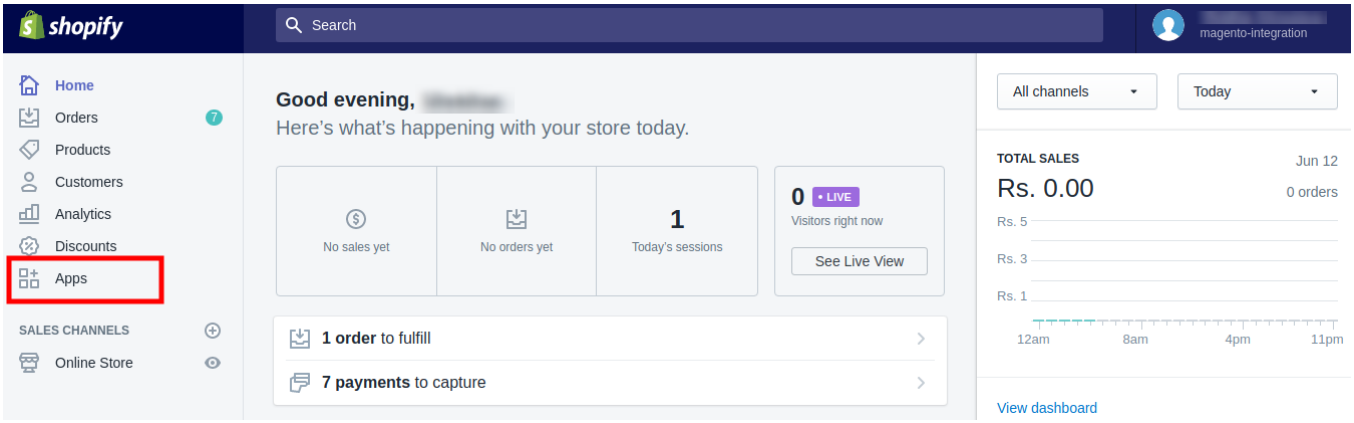
- It Auto Synchronizes your order and provides you the coherence in your work.
- Due to the Automated Order Acknowledgement functionality, you can always hit the order without any failure.
- Auto Synchronization of the Order Management periodically – at fixed times, dates, or intervals.
- You can easily ship your order from one place.
- Crons help you to automate and synchronize your orders and shipments at a certain interval of time.

2. Getting the API Details

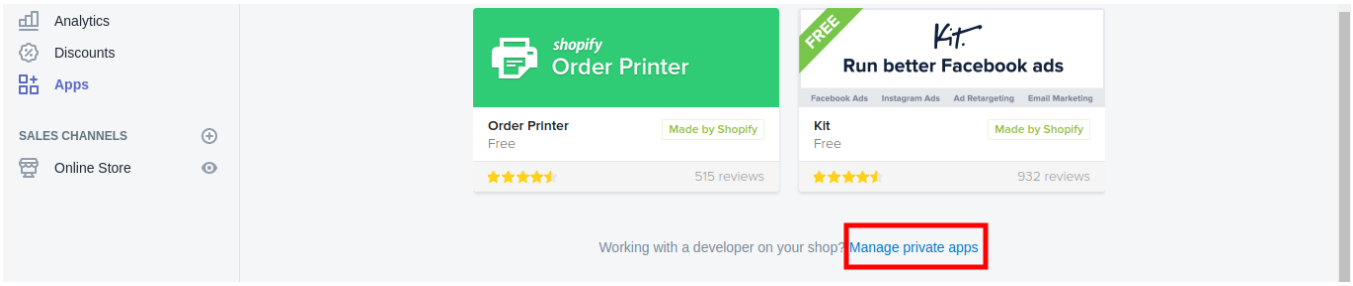
For the configuration to be completed, you need the API details which you need while doing the configuration.

To get the API details,

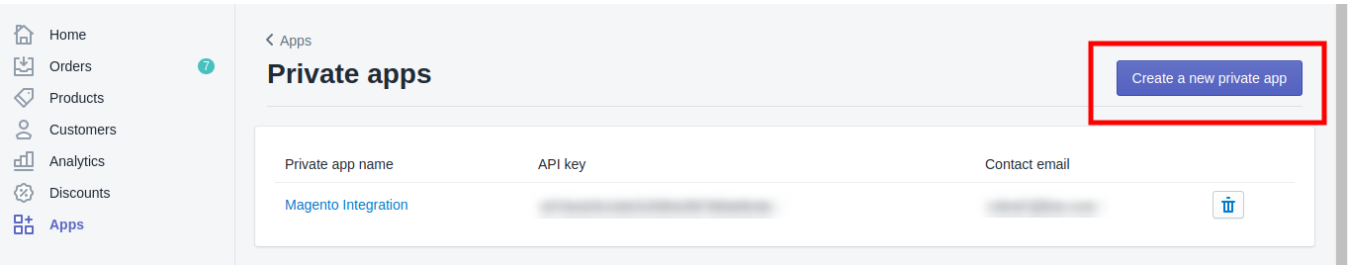
- Go to your Shopify admin panel which looks as shown in the image below:



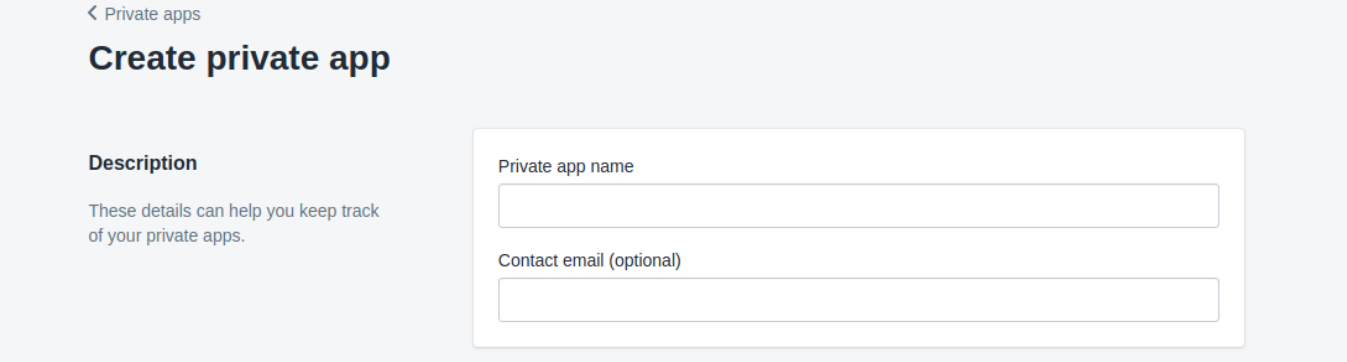
- Click on Apps which is highlighted in the above image. You will be navigated to a page as shown below:



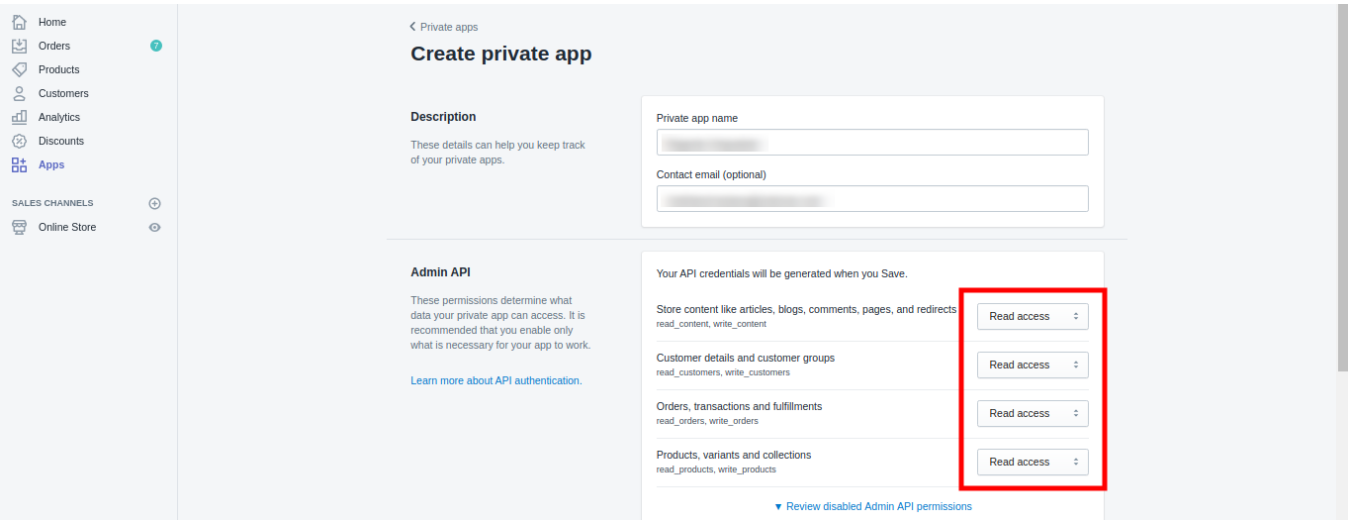
- Scroll down and you will see **Manage Private Apps** option as shown in the above image in red box. Click it and you will be taken to page which appears as:



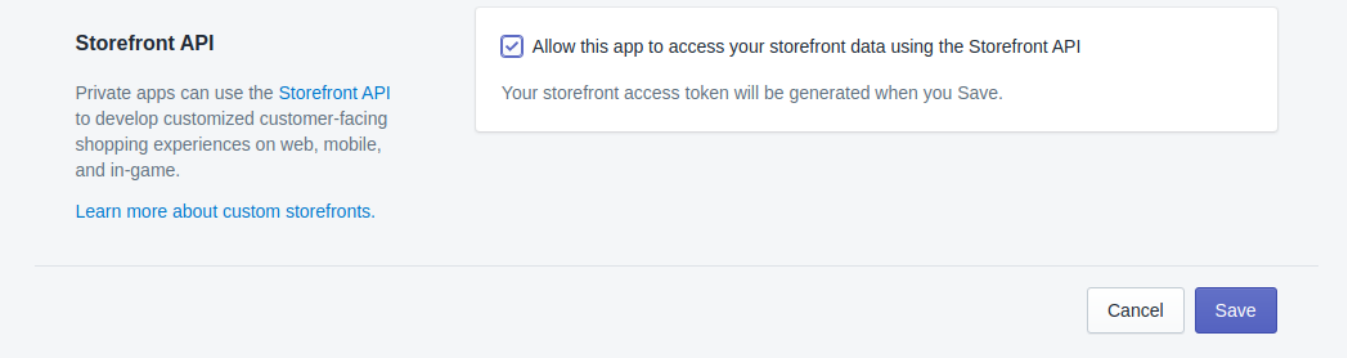
- Click on **Create a new private app** as shown in the above image.
- On clicking it, you will be navigated to a page as:



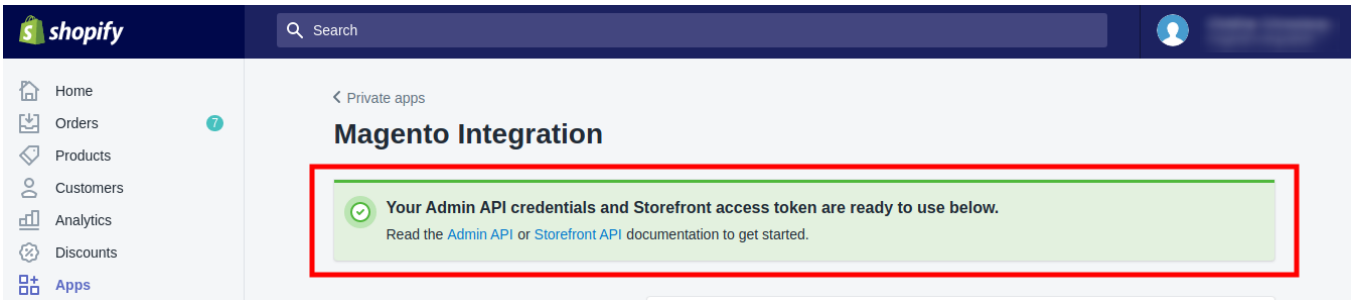
- Now enter your private app name, as you want its name to be.
- Enter the contact email which is optional. Once details have been entered, select the access options in next section, as shown in the red boxes in the image below.



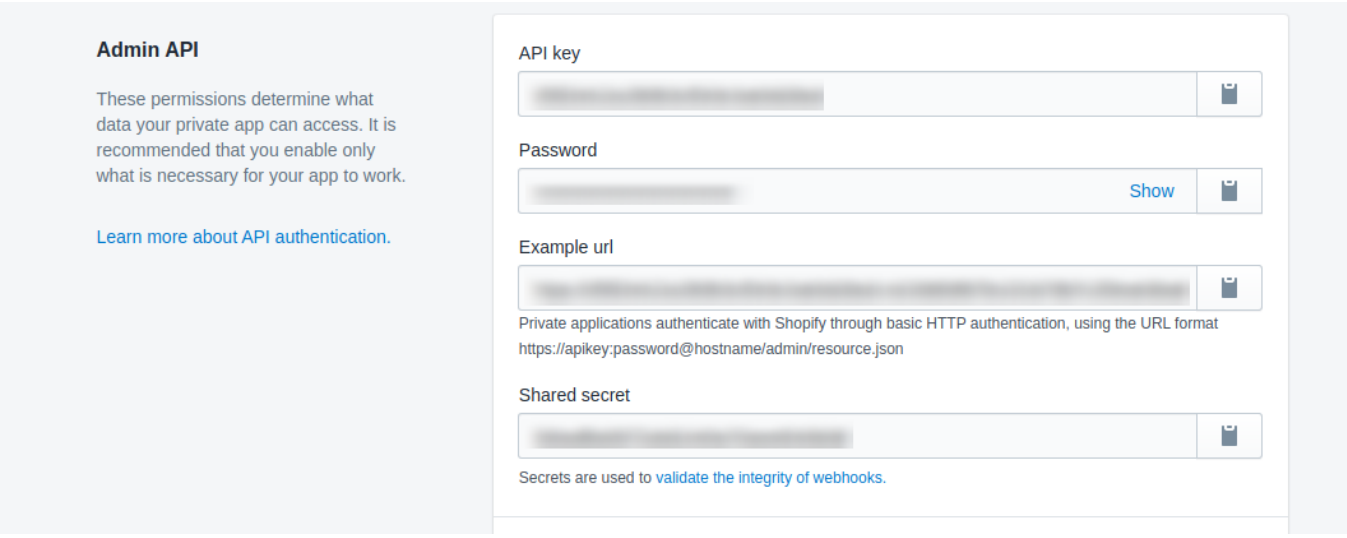
- Now click on **Save** button as shown in the image below:



- On saving it, the message appears on the same page, as shown in the image below:



- Now on this page, you may get the API details as:



- You may copy them by keeping them open in a separate tab and paste in the corresponding fields in the API settings under configuration.

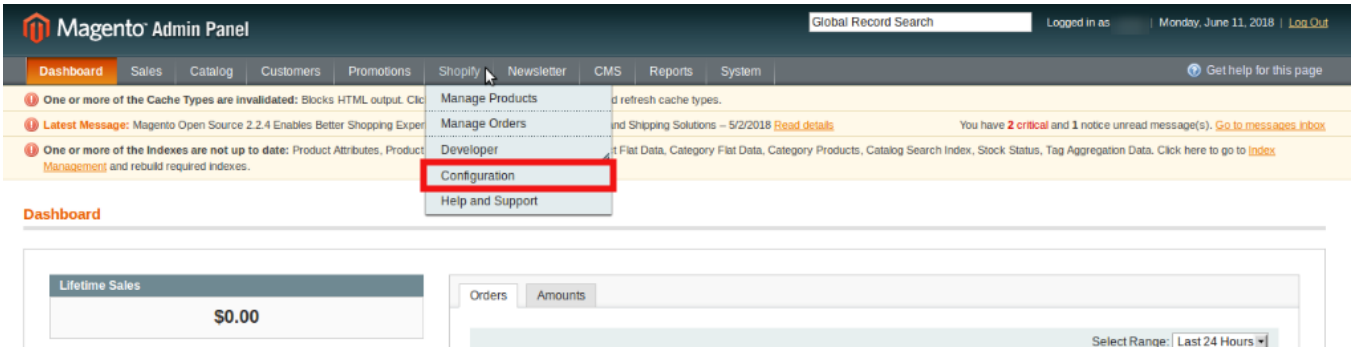
3. Configuration Settings

Once the Extension of Shopify Integration for Magento is installed, the configuration needs to be done in order to

proceed further.

To do the Configuration,

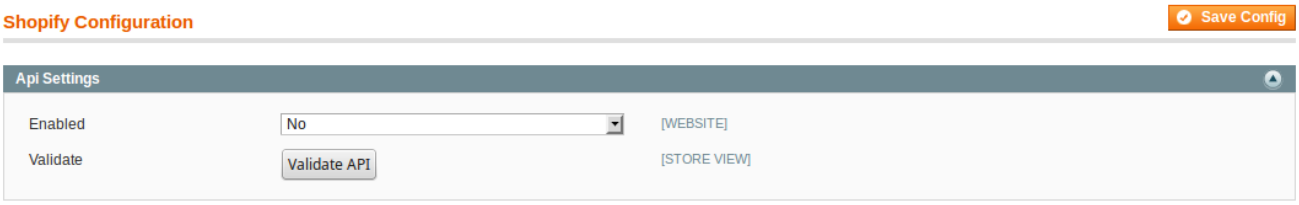
- Go to your Magento admin panel.
- On the top navigation bar, you can see Shopify which appears after the extension's installation.
- Place the cursor on it and the menu appears as:



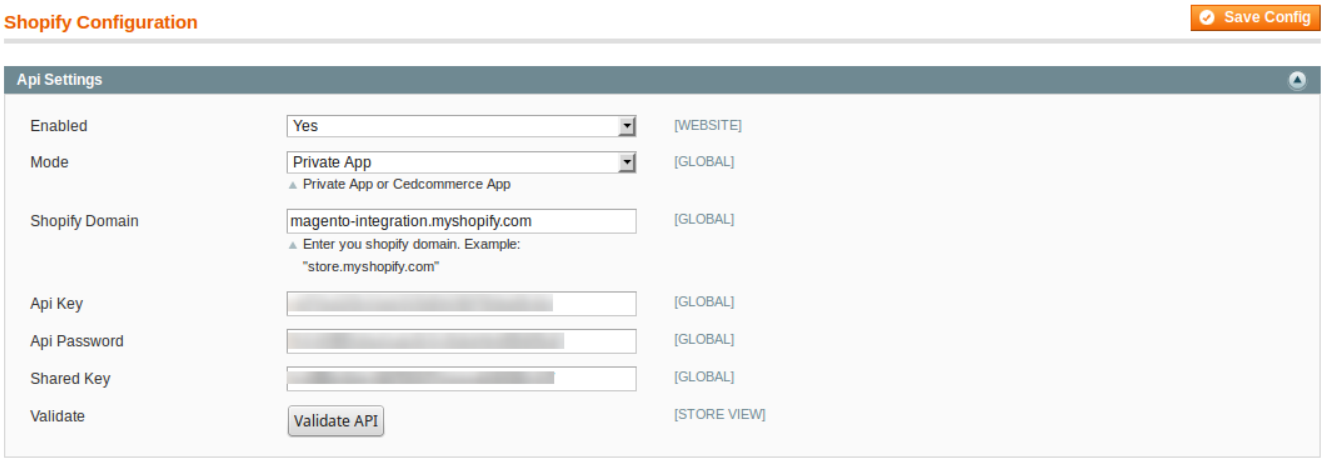
- Click **Configuration** from the menu and you will be navigated to the configuration page as shown below:

API Settings

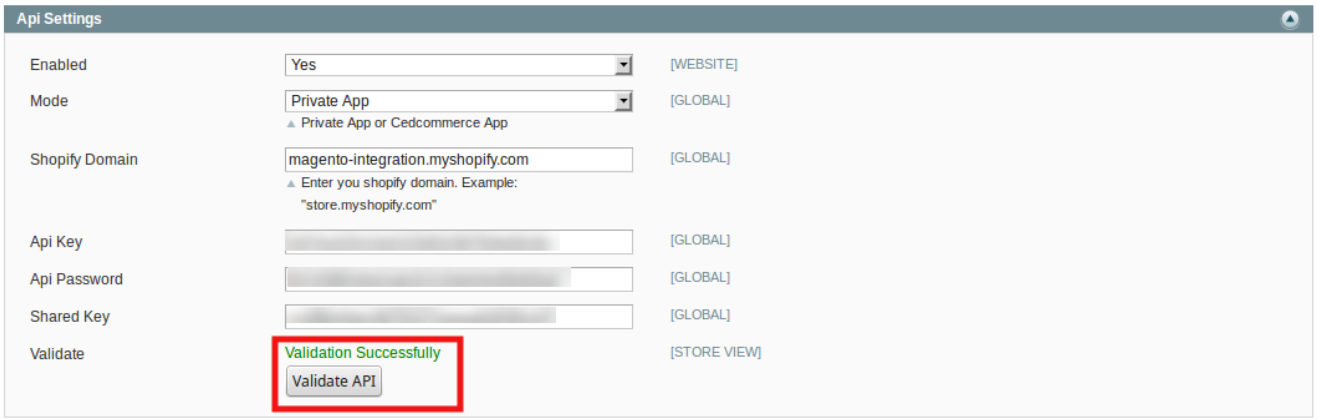
- Click on API Settings and the section will expand as shown below:



- In **Enabled**, select Yes to **enable** the extension. On enabling it, the section further expands and appears as:

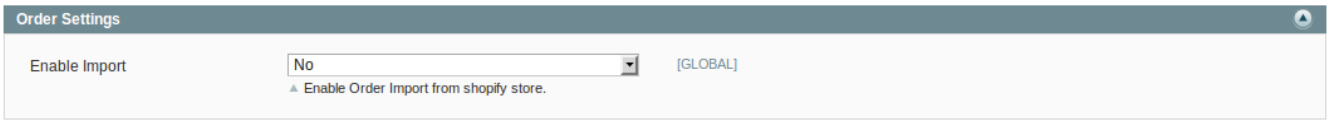


- In **Mode,** select between Private App or CedCommerce.
- In **Shopify Domain**, enter your Shopify Domain as has been shown in the example in image above.
- In the **API Key**, enter the API Key which you may get from your Shopify admin panel.
- In the **API Password,** enter the API Password which you may get from your Shopify admin panel.
- In the **Shared Key**, enter the Shared Key which you may get from your Shopify admin panel.
- Now click **Validate API** button for API Validation. A message would appear as shown below:

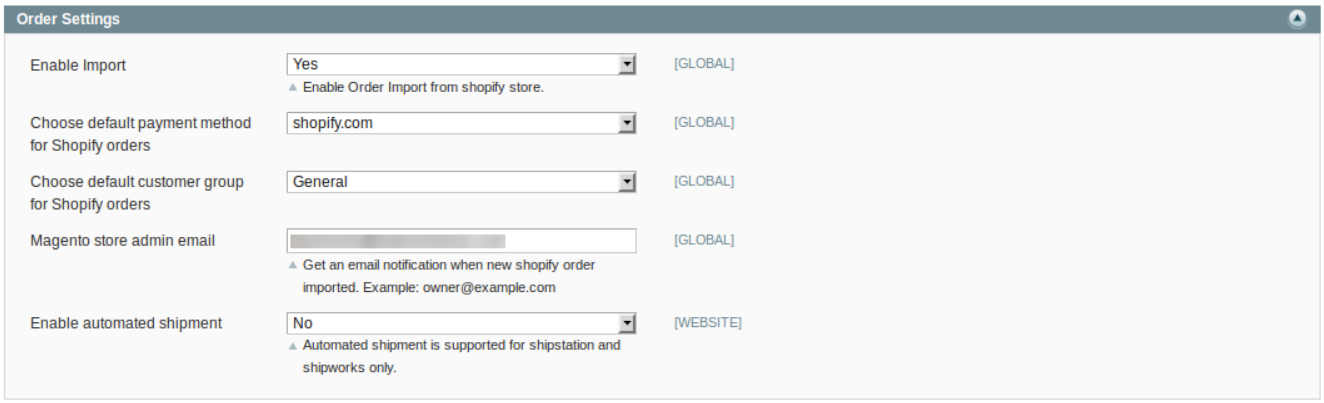


Order Settings

- Click on Order Settings and the section will expand as shown below:



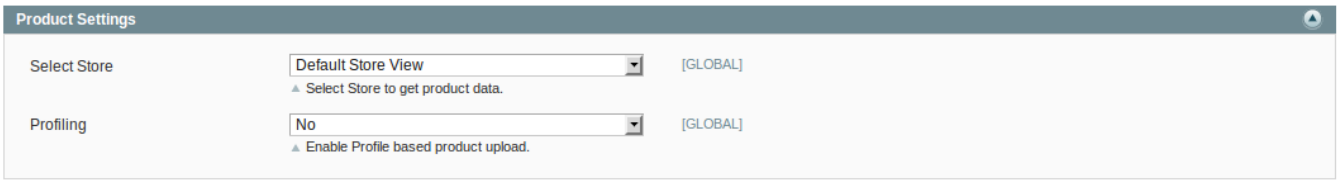
- In **Enable Import,** select **Enable** and the section will get expanded as:



- In **Choose default payment method for Shopify order,** select the payment method for the orders placed for your products on Shopify.
- In **Magento store admin email,** enter the email id on which you want notifications to be sent when a new Shopify order is imported.
- In **Enable automated shipment,** select **Yes** if you want automated shipment to be processed which is supported for ShipStation and ShipWorks. If you don't want automated shipment to be enabled, select **No**.

Product Settings

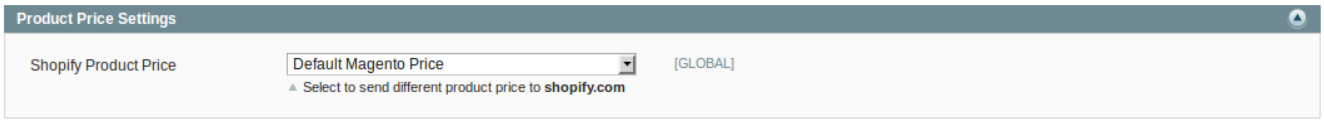
- Click Product Settings and the section expands as:



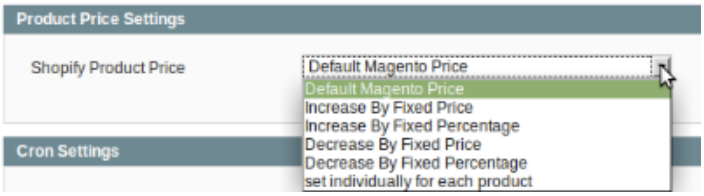
- In **Select Store**, select the store from which you want data to be sent to Shopify.
- In **Profiling**, select **Yes** if you want Profile-based product upload to be enabled. If you do not want it, select **No**.

Product Price Settings

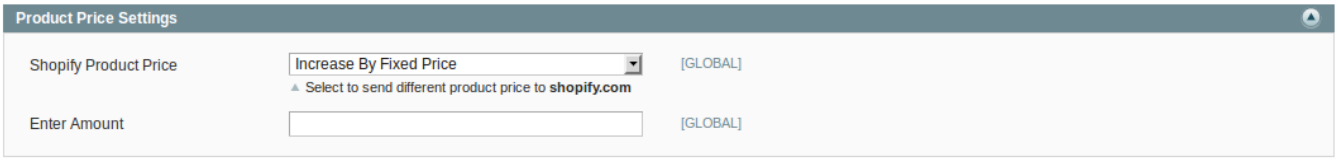
- Click Product Price Settings and the section will be expanded as:



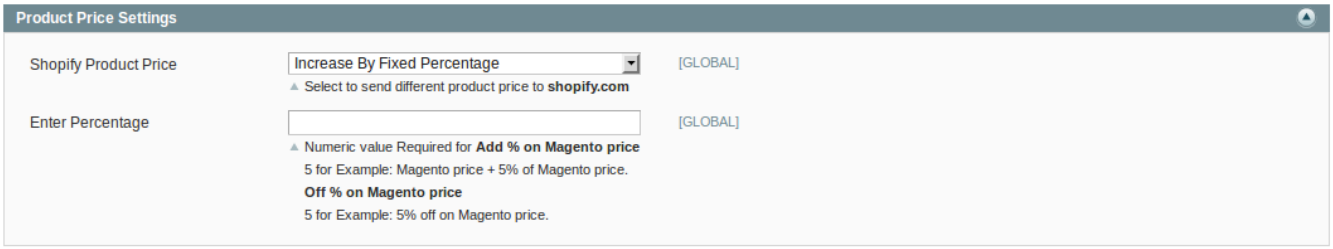
- In **Shopify Product Price,** you have the following options for price that you want to be sent to Shopify for your products.



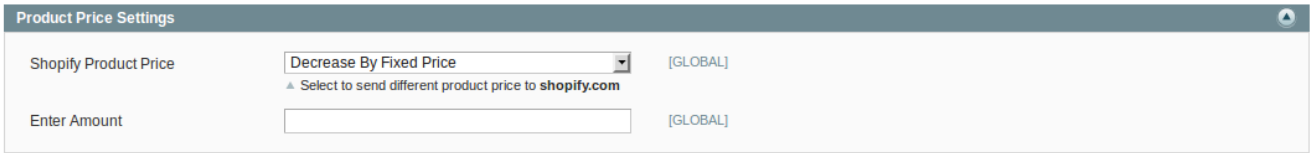
- Select **Default Magento Price** if you don't want any difference in the price of your Magento products on Shopify.
- **Increase By Fixed Price:** By selecting it, you may increase the price of your Magento products on Shopify. On selecting it, a box appears as:



- Suppose in the box, you enter 50. Now if your product is for $100 on Magento, it will be available on Shopify for $150 as you have increased the product price by 50, by entering 50 in the corresponding box.
- **Increase By Fixed Percentage:** By selecting it, you may increase your Magento product's price on Shopify by a certain percentage. On selecting it, a box appears as:

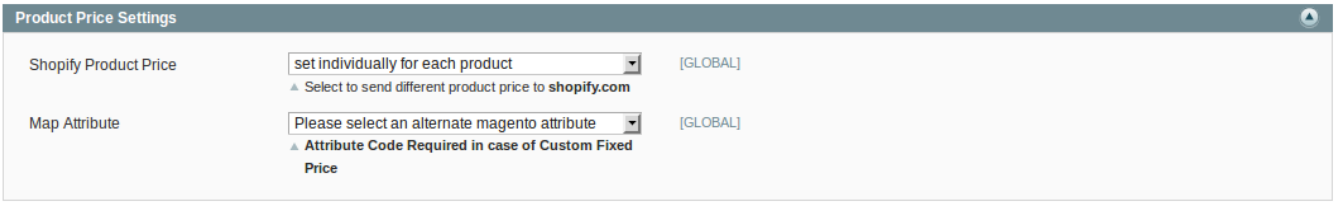


- Suppose in the box, you enter 50. Now if your product is for $100 on Magento, it will be available on Shopify for $150 as you have increased the product price by 50%, by entering 50 in the corresponding box. Since50% of 100 is 50, 50 will be added to 100.
- **Decrease By Fixed Price:** By selecting it, you may increase your Magento product's price on Shopify by a certain percentage. On selecting it, a box appears as:



- Suppose in the box, you enter 50. Now if your product is for $100 on Magento, it will be available on Shopify for $50 as you have decreased the product price by 50, by entering 50 in the corresponding box.
- **Decrease By Fixed Percentage:** By selecting it, you may decrease your Magento product's price on Shopify by a certain percentage.
- Suppose in the box, you enter 50. Now if your product is for $100 on Magento, it will be available on Shopify for $50 as you have decreased the product price by 50%, by entering 50 in the corresponding box. Since 50% of 100 is 50, 50 will be deducted from 100.
- **Select individually for each product:** You may set the price for products individually as well by selecting

this option. On selecting it, the box appears as:

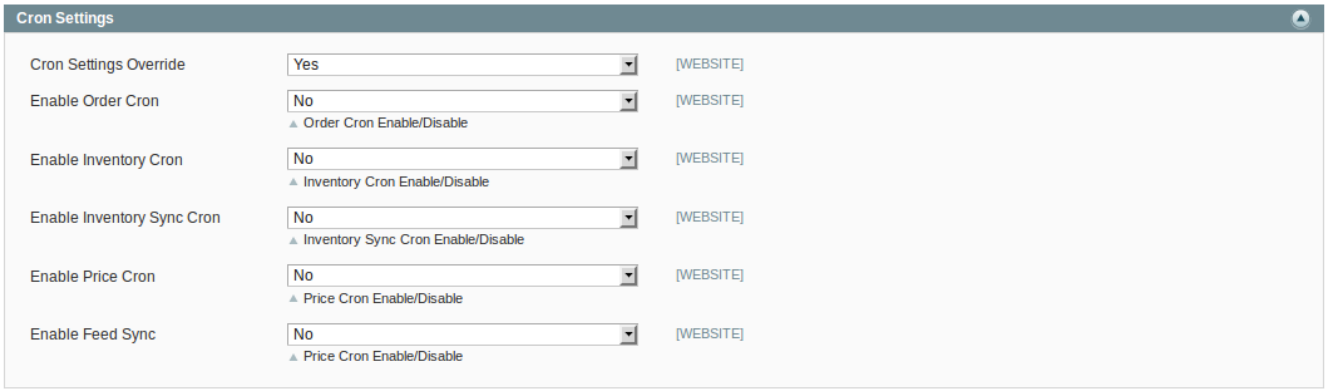


- In **Map Attribute**, select the attribute code from which the price would be fetched to be sent to Shopify from Magento.

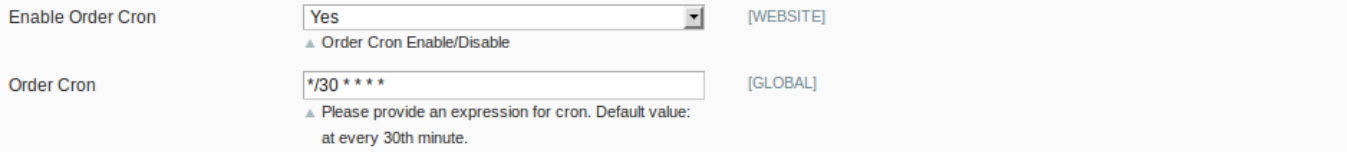
Cron Settings

- Click on Cron Settings and the section will appear as:

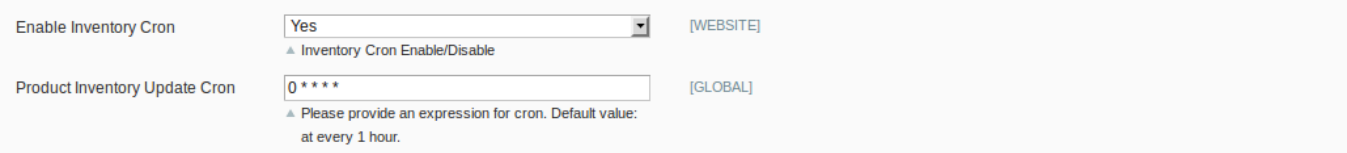
- In **Cron Settings Override**, select **Yes** if you want to set cron setting according to your needs, and the section will expand further as:



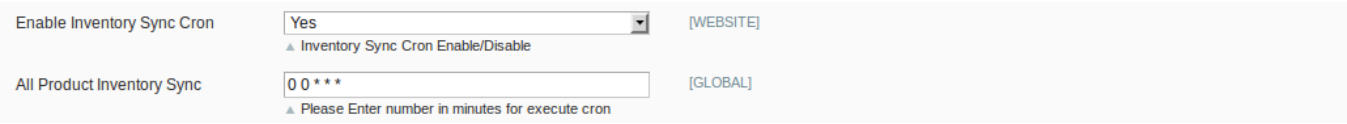
- In **Enable Order Cron,** select **Yes** if you want to enable the cron for orders to run, and the box will appear as:



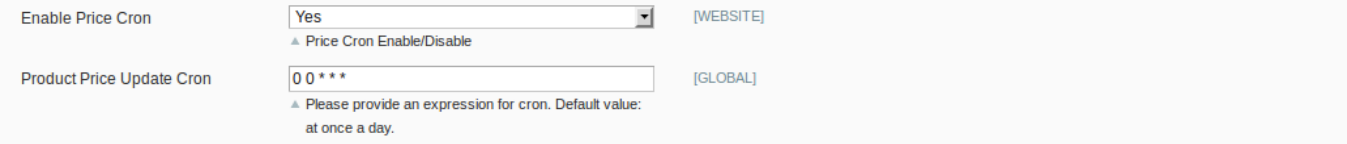
- In order cron, enter the time in minutes after which the order cron will run, periodically.
- In **Enable Inventory Cron,** select **Yes** if you want to enable the cron for orders to run, and the box will appear as:



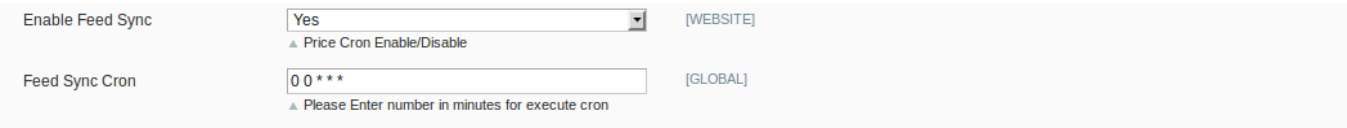
- In **Product Inventory Update cron**, enter the time in minutes after which the inventory cron will run, periodically.
- In **Enable Inventory Sync Cron,** select **Yes** if you want to enable the cron and the box will appear as:



- In **All Product Inventory Sync**, enter the time in minutes after which the all product inventory sync cron will run, periodically.
- In **Enable Price Cron,** select **Yes** if you want to enable the cron and the box will appear as:



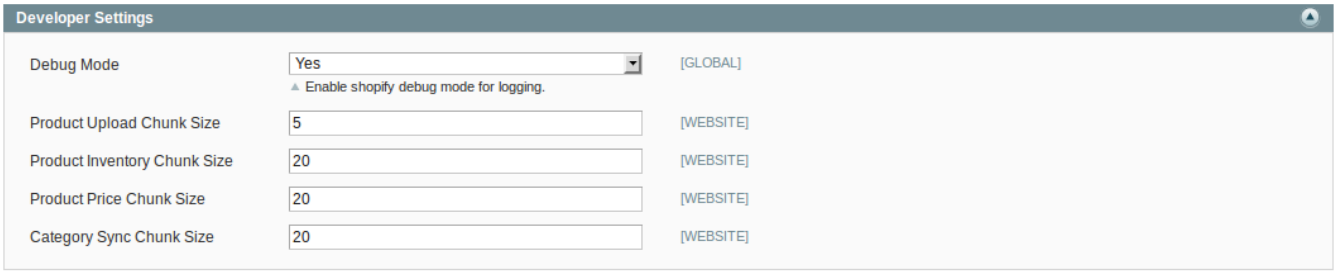
- In **Product Price Update Cron**, enter the time in minutes after which the product price cron will run, periodically.
- In **Enable Feed Sync,** select **Yes** if you want to enable the feed syncing and the box will appear as:



- In **Feed Sync Cron**, enter the time in minutes after which the feed syncing cron will run, periodically.

Developer Settings

- Click on Developer Settings and the section will appear as:



- In **Debug Mode,** select **Yes** if you want to enable the Shopify debug mode for logging. Otherwise, select **No**.

- In **Product Upload Chunk Size,** enter the quantity of products that you want to be sent to Shopify in one batch.
- In **Product Inventory Chunk Size,** enter the number of inventory of products that you want to be sent to Shopify in one batch.
- In **Product Price Chunk Size,** enter the number of product price that you want to be sent to Shopify in one batch.
- In **Category Sync Chunk Size,** enter the number of categories that you want to be sent to Shopify in one batch.

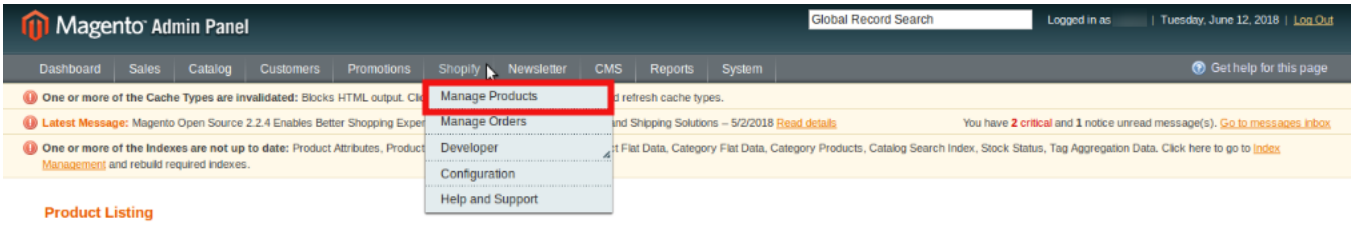
Once you have completed the steps mentioned above, under all the sections, click on **Save Config** button. All your configuration will saved.

4. Manage Products

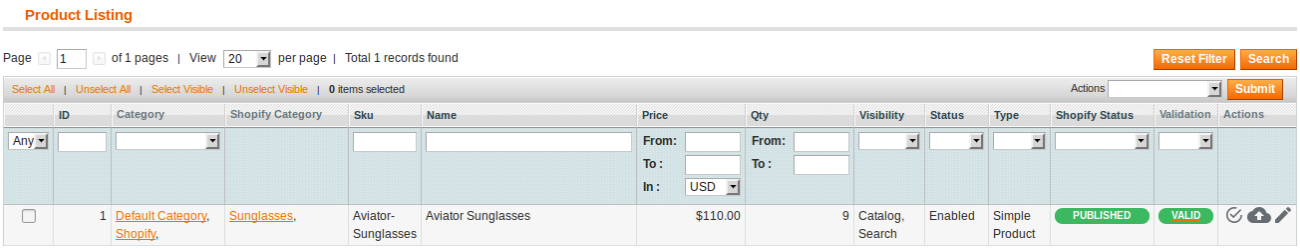
While integratiing Magento store with Shopify, the management of products can be done easily in some simple steps as will be shown in this section.

To take actions for the products,

- Go to your Magento admin panel.
- Put the cursor on the top navigation bar on Shopify. The menu appears as:

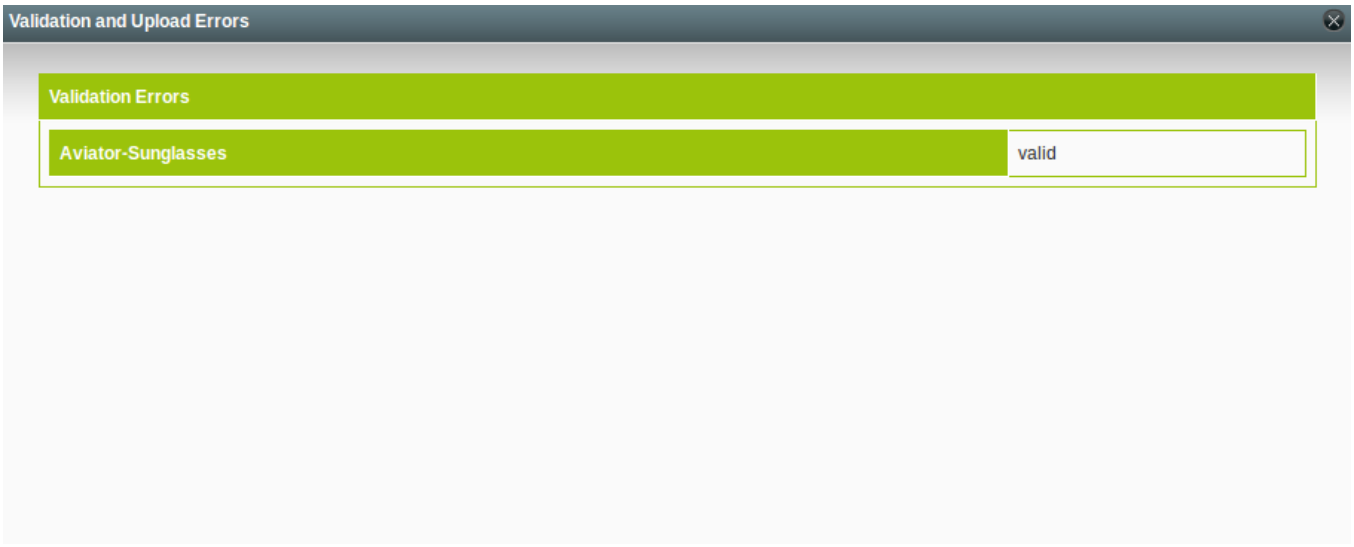


- Click Manage Products. You will be navigated to a page as:



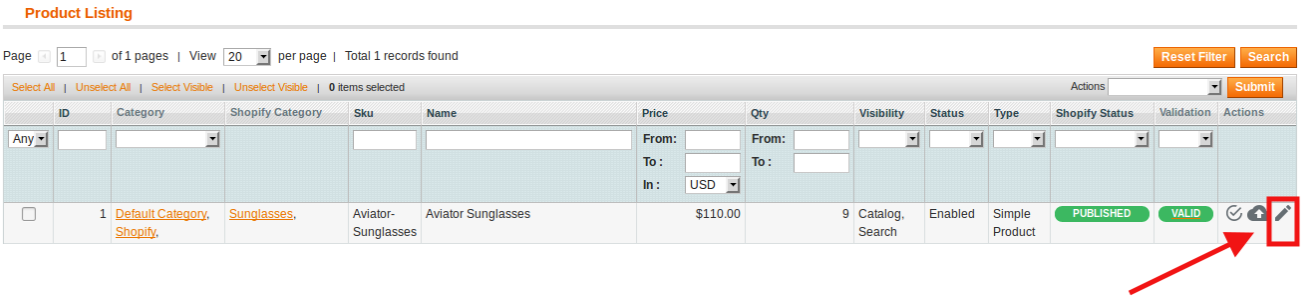
To See the Validation and Upload Errors

- Click on the status that appears under **Validation** column, adjacent to the product. The status appears as:

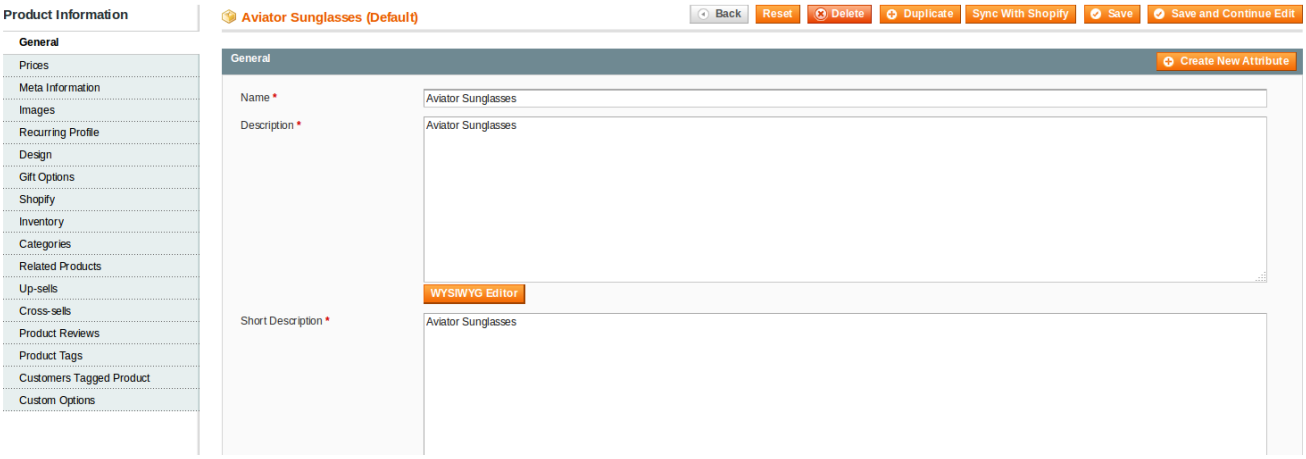


To Edit a Product

- On the Product Listing page, click on the **edit sign** as shown in the image below in the red color box, adjacent to the product, in the last column.



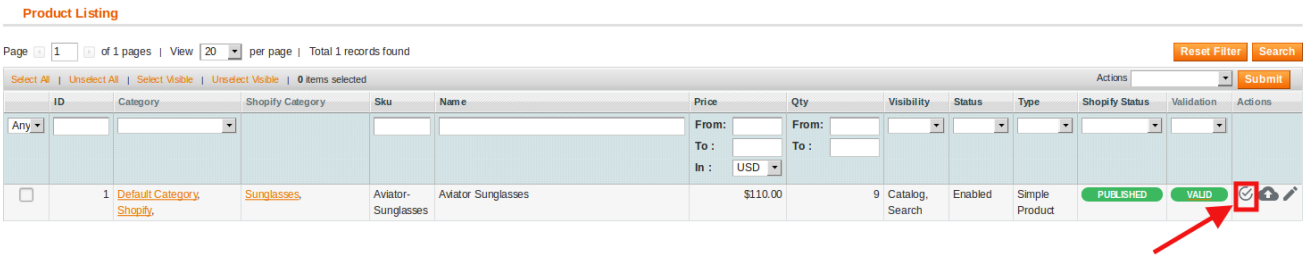
- On clicking it, you will be navigated to the page as shown below:



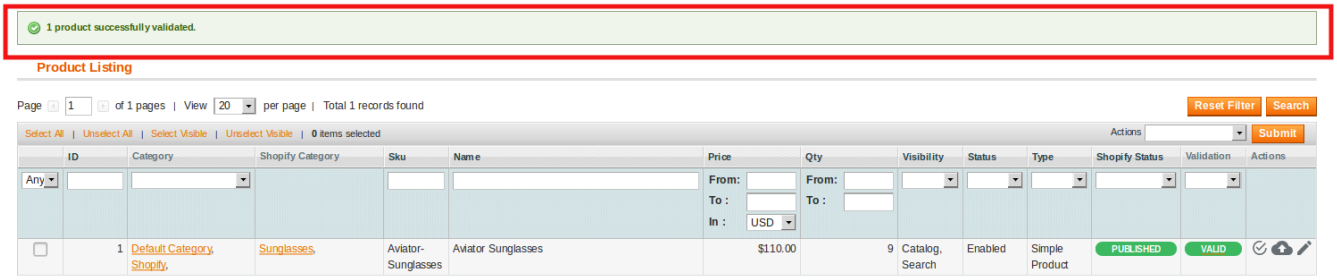
- On this page, you may edit the product details under different sections from the left panel.
- Once the changes have been made, click on **Save** button on the top of page. All changes will be saved.

To Validate a Product

- Click on the **Validate** button in the last column adjacent to the product that you want to validate, as shown in the figure below:

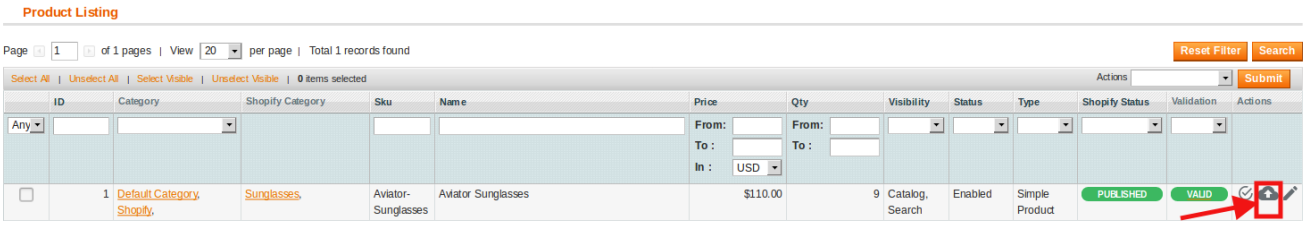


- The product will be validated and a message will appear as shown in the image below:

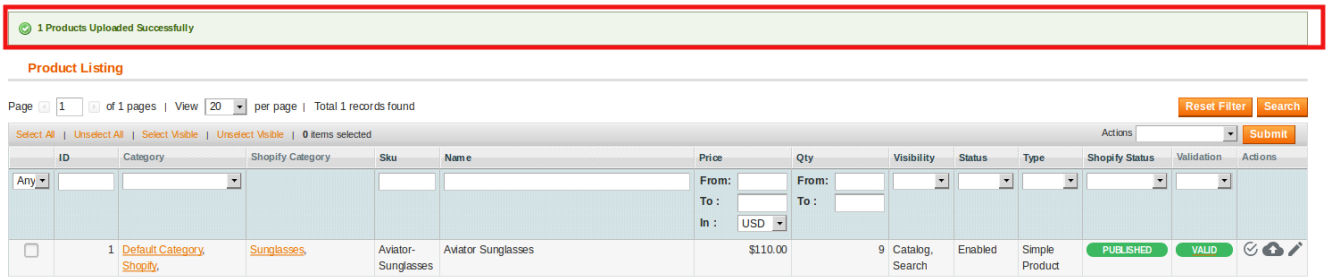


To Upload a Single Product

- To upload a single product, click on upload sign as shown in the image below, adjacent to the product in the last column:

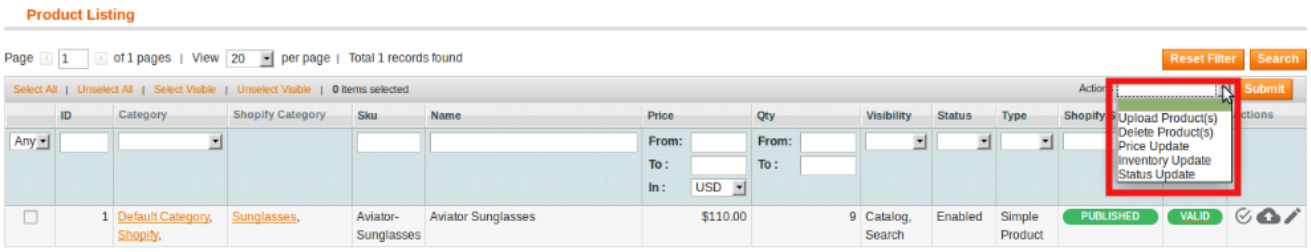


- The product will be uploaded and a message will appears on the screen as:

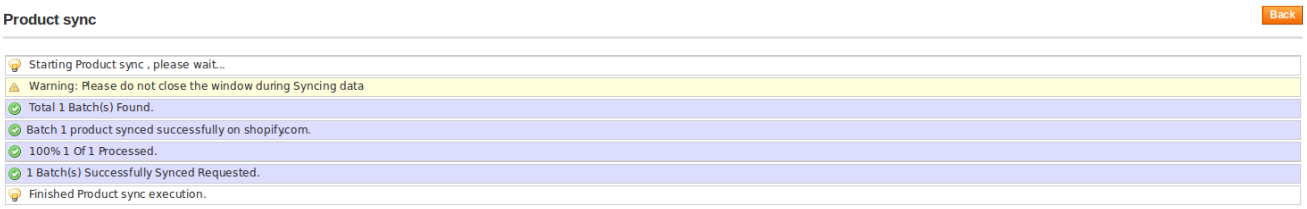


To Upload Products in Bulk

- To upload multiple products, select the products and from **Actions** on the top of page, select the option of **Upload Product(s).**



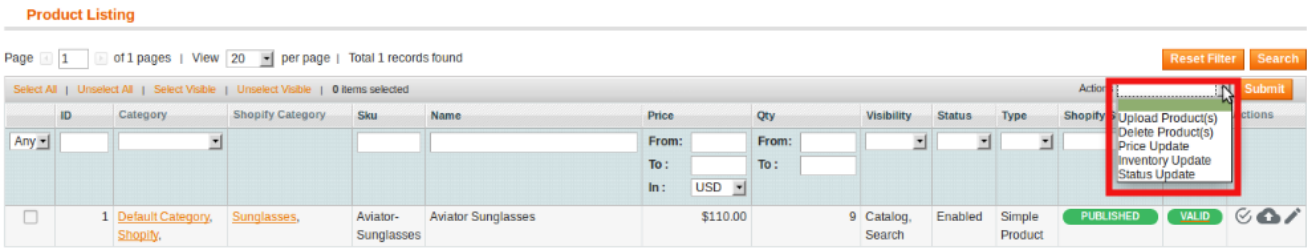
- Click **Submit** button next to it. You will be navigated to page with product sync status, as shown below:



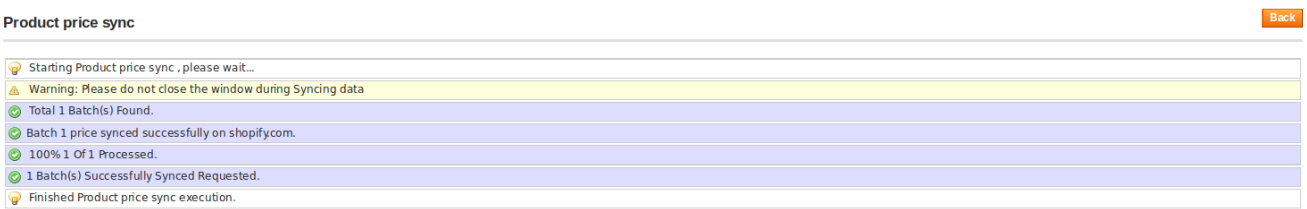
- The product gets uploaded.

To Update Product Price

- Select the product for which you want the price to be updated.
- Click on Actions on top of the page and choose **Price Update** as shown in the image below:

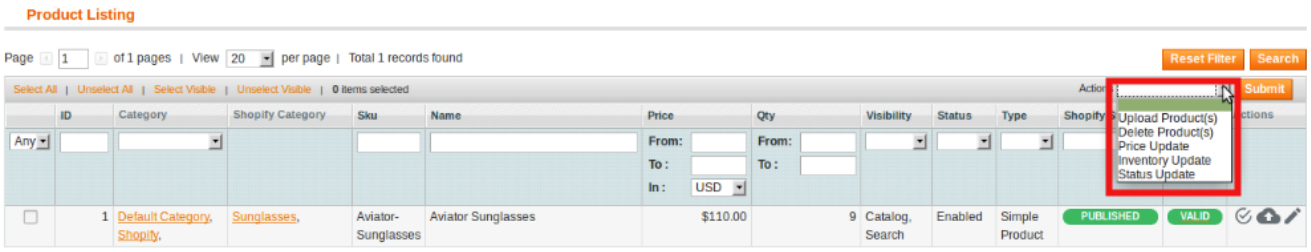


- Click on **Submit** button. The status of the price updation will appear as:

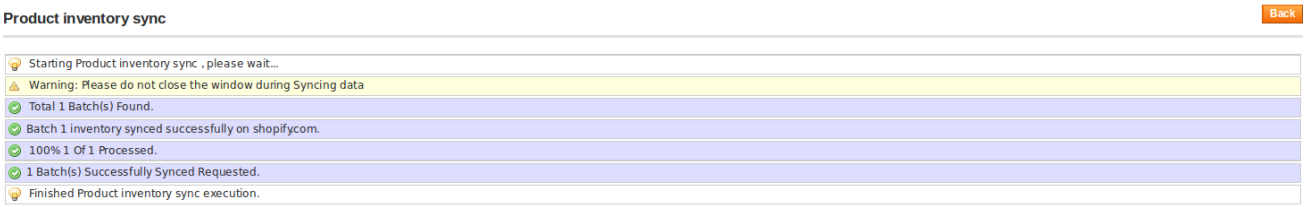


To Update Inventory

- Select the products for which you want the Inventory to be updated.
- From **Actions**, select Inventory update and click on **Submit** button.

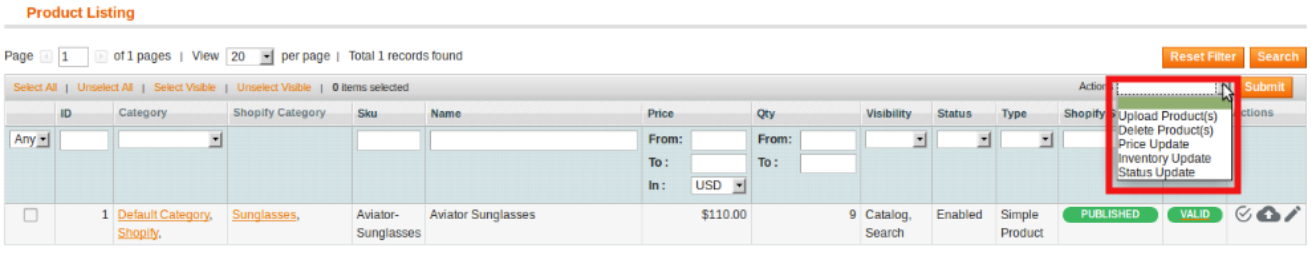


- You will be navigated to a page as shown below, with inventory update message:

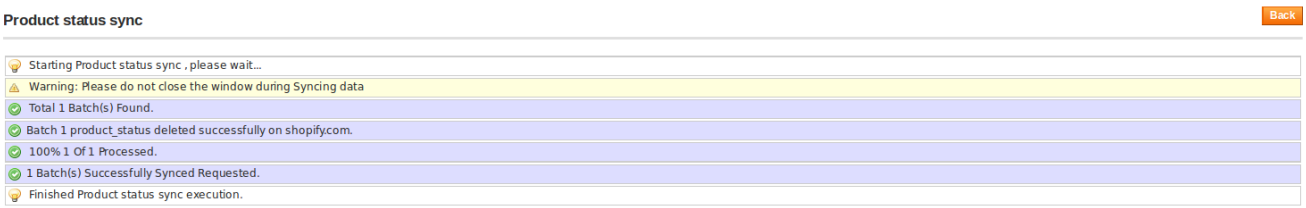


To Update the Status

- Select the products for which you want the status to be updated.
- From **Actions**, select status update and click on **Submit** button.



- You will be navigated to a page as shown below, with status update message:



To Delete Product(s)

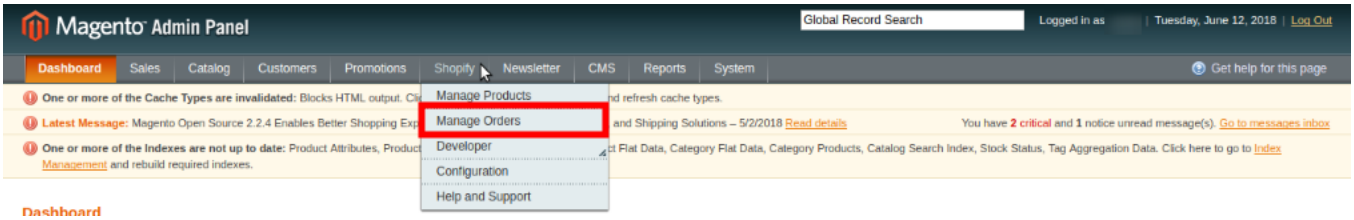
- Select the products that you want to delete.
- Select **Delete Product(s)** from Actions. Click on **Submit** button.
- The product will be deleted.

5. Manage Order

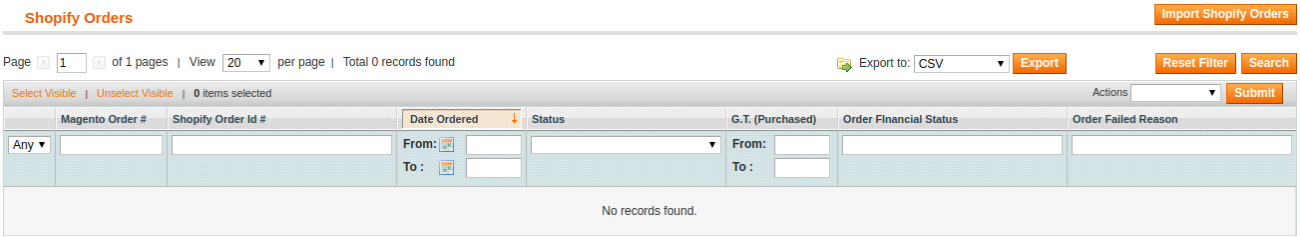
After the Magento store gets integrated with the Shopify store, the admin may manage the Shopify orders easily from the Magento admin panel itself.

To Manage the Shopify Orders,

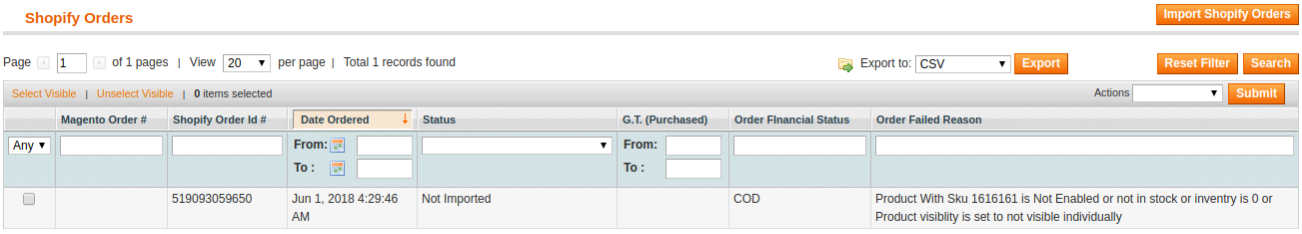
- Go to your Magento admin panel.
- Place the cursor on Shopify on the top navigation bar.
- From the menu that appears as shown in the image below, click on **Manage Orders.**



- On clicking it, you will navigated to the page as shown below:



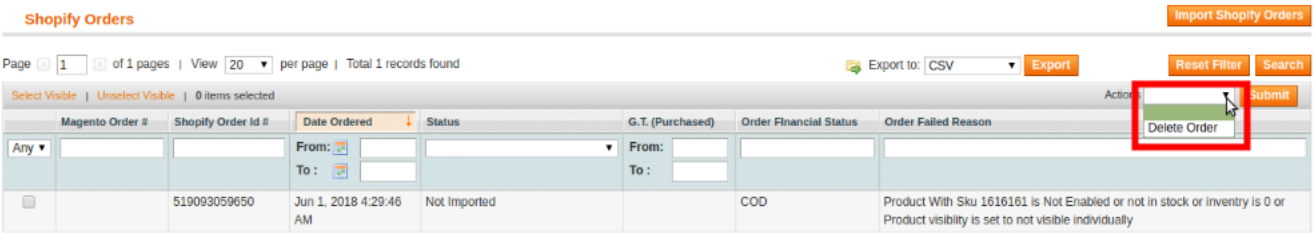
- To get the Shopify orders on Magento admin panel, click on **Import Shopify Orders.**
- On clicking it, the order will be fetched from Shopify and listed as shown in the image below:



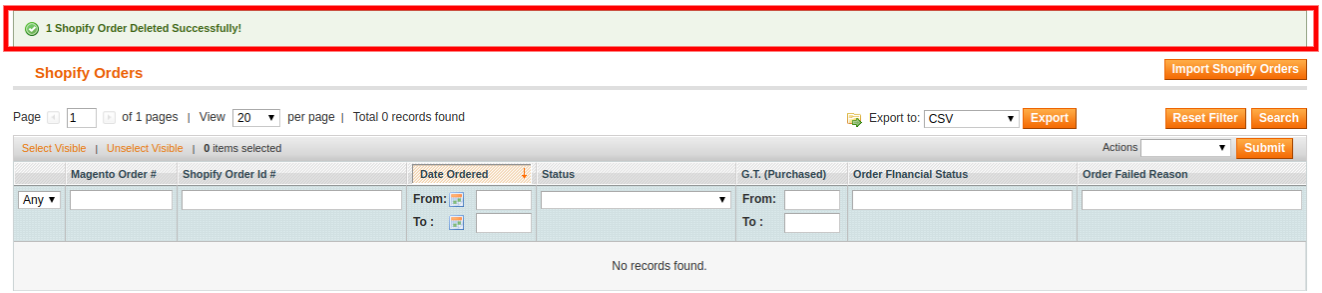
- On this page, you may see the details of the Shopify orders such as **Magento Order Number, Shopify Order ID Number, Order Status**, etc.

To Delete Shopify Order,

- Select the order that you want to be deleted.
- Click the **Actions** drop down bar on top of the order listing page as shown below:



- You may see **Delete** option which you need to select.
- Click on **Submit** button.
- The order will be deleted and a message will appears as shown in the image below:



6. Developer Settings

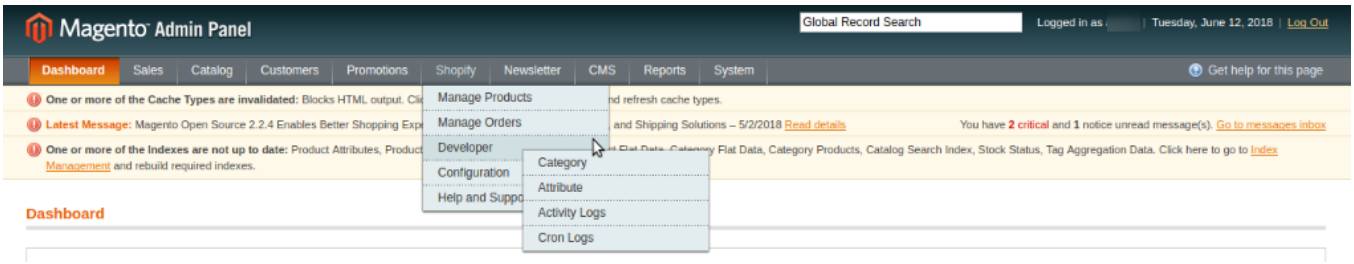
The **Developer Settings** included in the Shopify Integration for Magento Process has the following functions:

- Category(https://docs.cedcommerce.com/magento/shopify-magento-integration-guide/?section=category)
- Attributes(https://docs.cedcommerce.com/magento/shopify-magento-integration-guide/?section=attributes)
- Activity Logs(https://docs.cedcommerce.com/magento/shopify-magento-integration-guide/?section=shopify-logs)
- Cron Logs(https://docs.cedcommerce.com/magento/shopify-magento-integration-guide/?section=cron-logs-2)

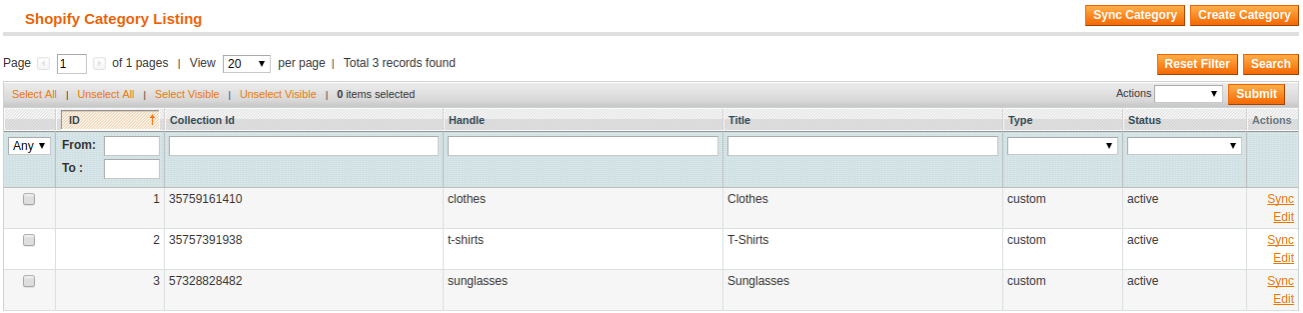
6.1. Category

To take certain actions relevant with the Shopify Categories,

- Go to your Magento admin panel.
- Place cursor on **Shopify** on top navigation bar and then on **Developer.** The menu appears as:

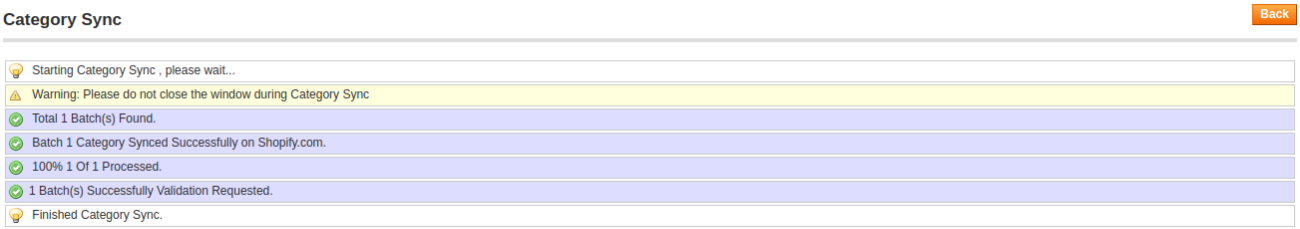


- Click on **Categories.**
- The page that you will be navigated to will look like shown in the image below:



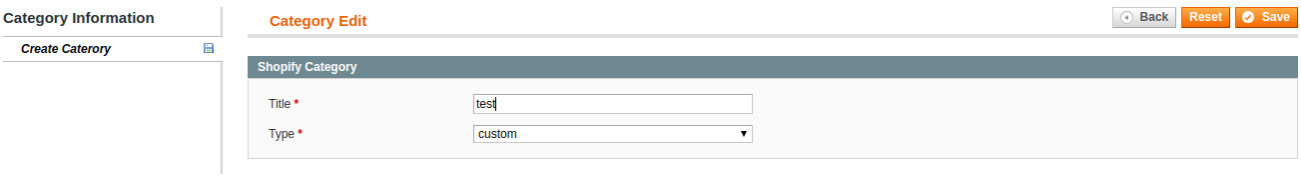
To sync the categories,

- Click on **Sync Category** button on the top right of the page. The Shopify categories will be synced with Magento and the status message will appear as:



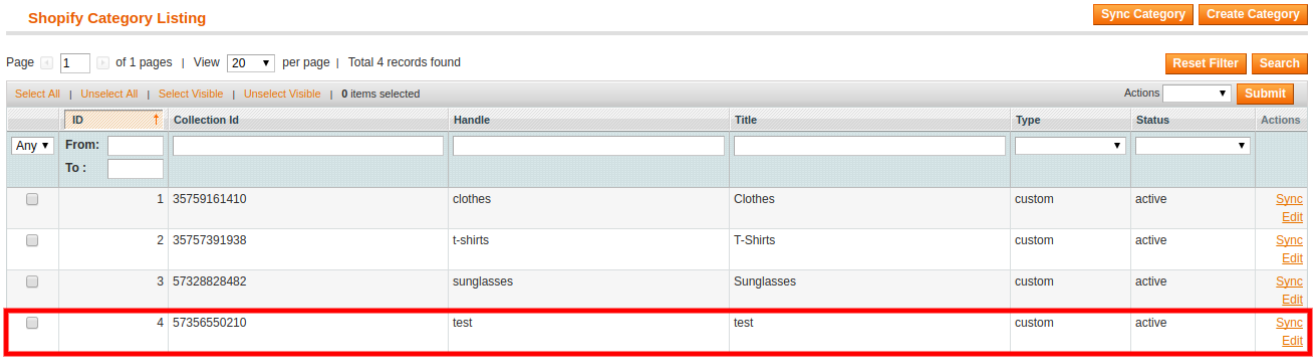
To create the categories,

- Click on **Create Categories** button on the top right of the page.
- On clicking it, you will be taken to the page as:



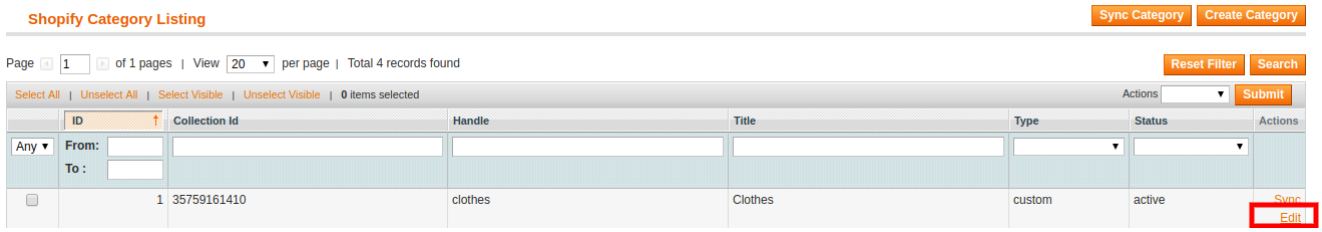
- Enter the **title** of the category that you are creating.
- Select its **type**.
- Click on **Save** button on the top right of the page.

- The category will be created and you will be navigated back to the category listing page where you may now see the category just created, as shown below:

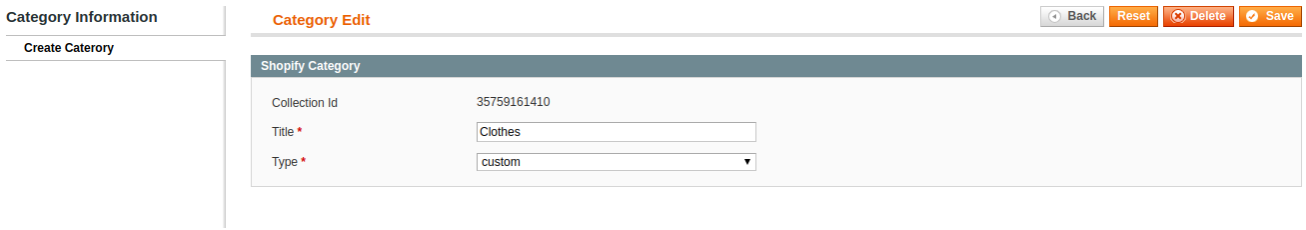


To Edit the Categories,

- Click on **Edit** which is in the last column under **Actions**, as shown in the image:



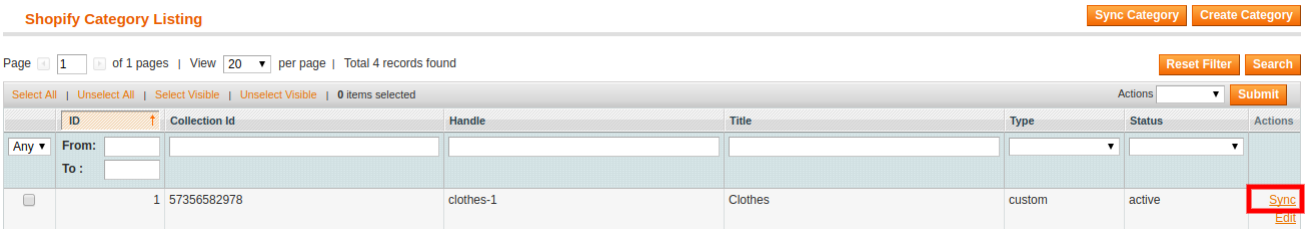
- On clicking it, you will be taken to the page as:



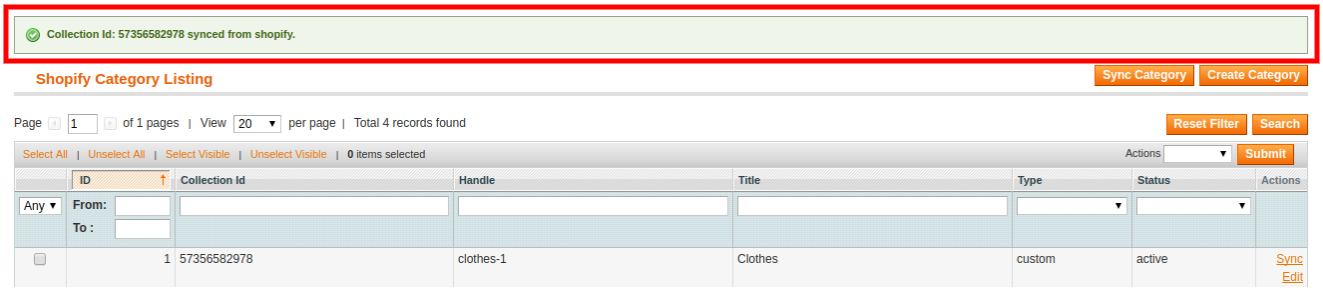
- On this page, you may make changes to the existing category and once the changes have been made, click on **Save** button on the top right of page.
- The changes will be saved.

To sync the individual category for updation in accordance with any change

- Click on **Sync** as shown in the image below:

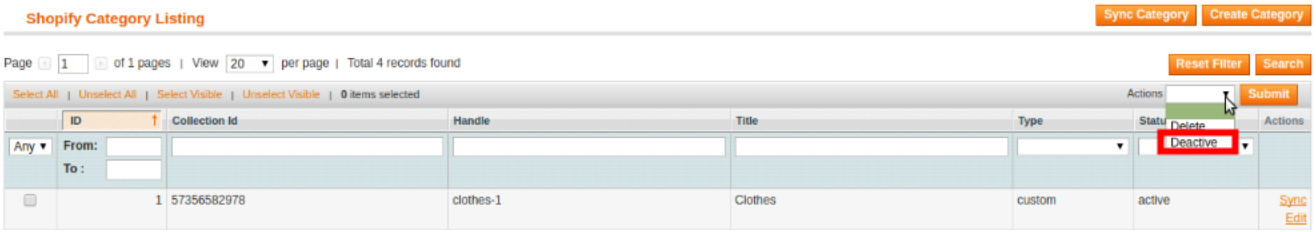


- On clicking it, the category will be synced and a message will appears on the page as:



To Deactivate the Category,

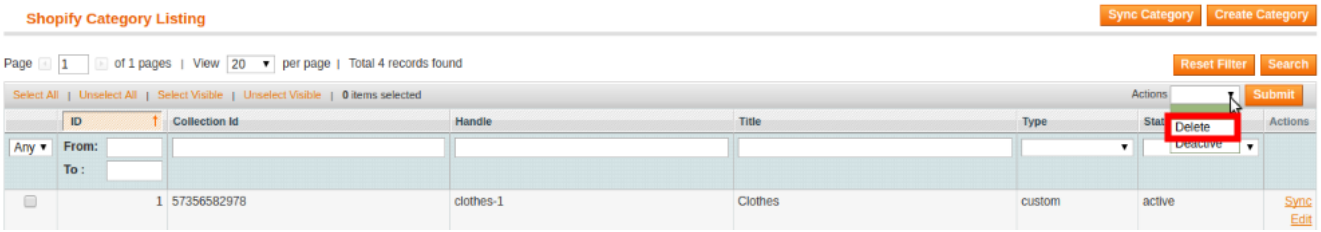
- Select the category that you want to deactivate.
- Click the **Actions** drop down on top, which appears as:



- Select **Deactive** option and click **Submit** button.
- Category will get deactivated.

To Delete the Category

- Select the category that you want to delete.
- Click the **Actions** drop down on top, which appears as:

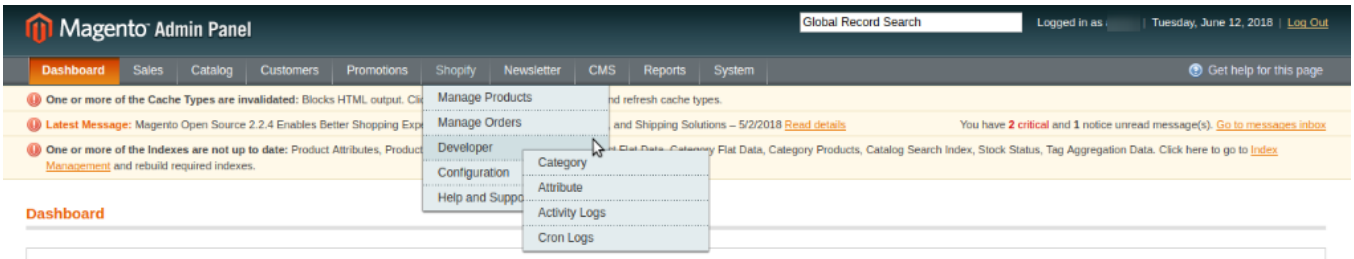


- Select **Delete** and click on **Submit** button.
- Category will get deleted.

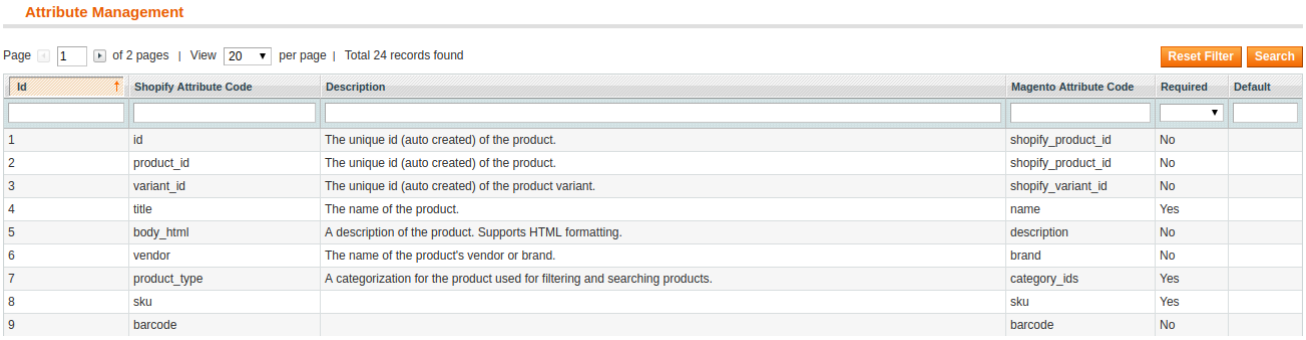
6.2. Attributes

To view the attributes,

- Go to the Magento admin panel.
- On the top navigation bar, place cursor on **Shopify** and then on **Developer.**



- When the menu appears, click on **Attributes** and you'll be navigated to the page as:



Id	Shopify Attribute Code	Description	Magento Attribute Code	Required	Default
1	id	The unique id (auto created) of the product.	shopify_product_id	No	
2	product_id	The unique id (auto created) of the product.	shopify_product_id	No	
3	variant_id	The unique id (auto created) of the product variant.	shopify_variant_id	No	
4	title	The name of the product.	name	Yes	
5	body_html	A description of the product. Supports HTML formatting.	description	No	
6	vendor	The name of the product's vendor or brand.	brand	No	
7	product_type	A categorization for the product used for filtering and searching products.	category_ids	Yes	
8	sku		sku	Yes	
9	barcode		barcode	No	

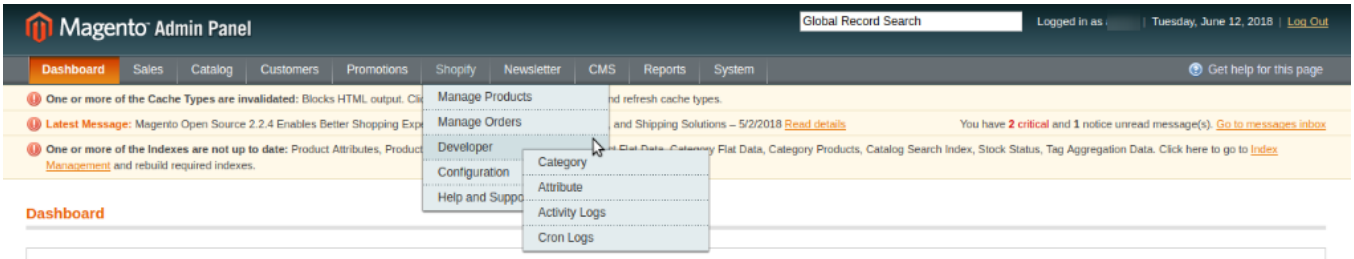
- On this page, you can see all the attribute related details.

6.3. Shopify Logs

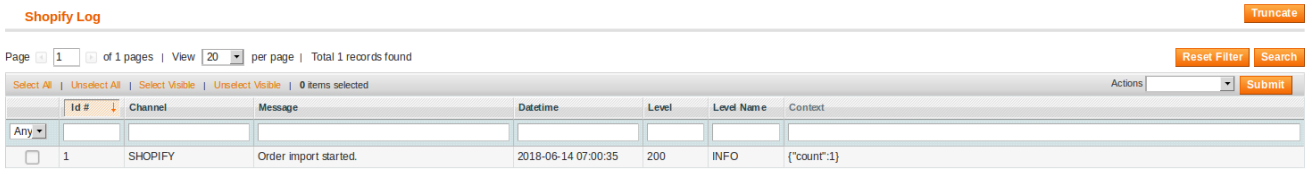
The logs created while sending the Magento products on Shopify get created and can be seen and managed from the Magento admin panel.

To see or manage the Shopify Logs,

- Go to you Magento admin panel.
- Place cursor on **Shopify** on the top navigation bar.
- When menu appears, place cursor on **Developer** and then click **Activity Logs**.



- On clicking it, you'll be navigated to the Shopify Logs page as:



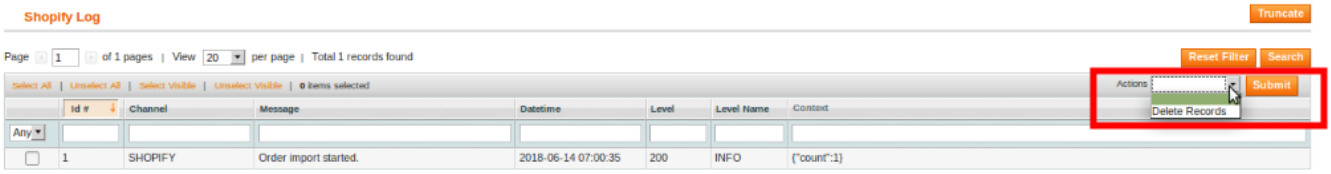
- On this page, you may see the logs as shown in the above image. If they are not listed, click Reset Filter and the logs will be listed as shown in the figure.

To delete all the logs,

- Click on **Truncate** button and all the logs will be cleared from the list.

To delete selected logs,

- Select the log(s) you want to be deleted.
- Click on **Actions** drop down on the top right, above the listing. You will see the option of deleting a record as:



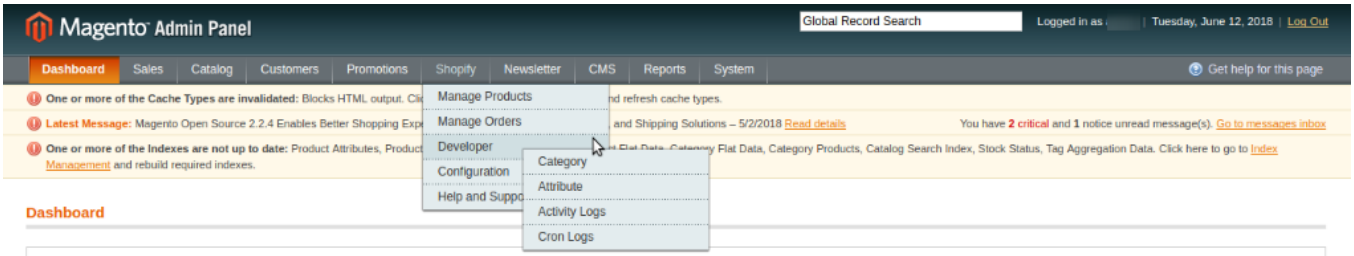
- Click on **Delete Records.**
- Click on **Submit** button.
- Your selected log record(s) will be deleted.

6.4. Cron Logs

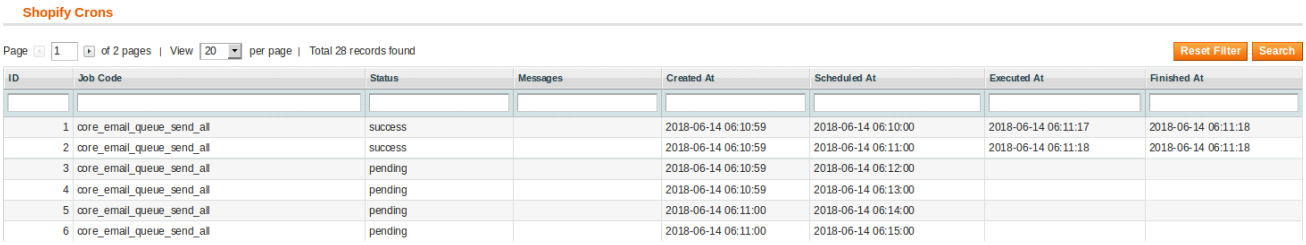
Seller may see the cron logs that are running – from the Magento admin panel itself – after the integration of Magento store with Shopify is done.

To see the Cron Logs,

- Go to your Magento admin panel.
- Place cursor on **Shopify** on the top navigation bar and when the menu appears, move it on **Developer**.
- Now click on **Cron Logs.**



- On clicking it, you will be navigated to the **Shopify Crons** page which appears as:



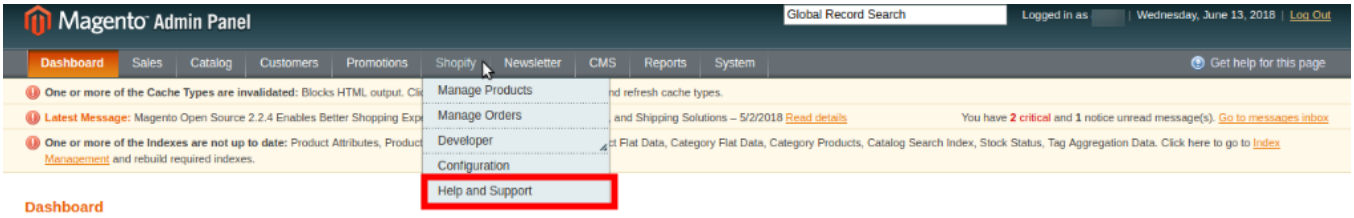
- You may see the crons on this page and if they are not listed, click on **Reset Filter** button on top right of the page and the cron logs will be listed as shown in the image above.
- Here, you may see the Status of the cron, its Time of Creation, its Scheduling time, Execution time, and the time at which it was finished or will get finished. You may also see the Messages.

7. Help and Support

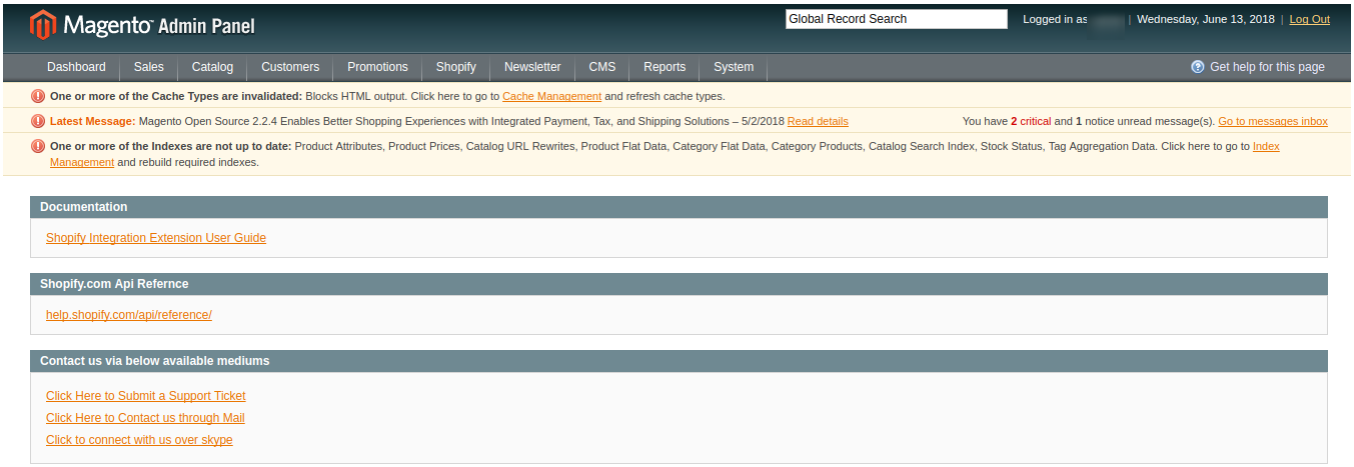
To help the admin in successfully integrating the Magento store with Shopify, or to help with the extension related issues, CedCommerce extends the support round the clock and provides mediums that can help via **Help and Support.**

<u>To go to the Help and Support section,</u>

- Go to Magento admin panel.
- Place cursor on Shopify on the top navigation bar and click Help and Support.



- On clicking it, you will be navigated to a page which appears as:



- **To see the Documentation,** click on **Shopify Integration Extension User Guide** and you will be able to see the documentation in which you can see the steps to integrate you Magento store with Shopify successfully. You can also learn through this Document how to manage category, orders, crons, logs, etc.
- For **Shopify.com Api Refernce,** click on help.shopify.com/api/reference/(https://help.shopify.com/api/reference) .
- To **Contact us,** you may choose the medium via which you may wish to communicate with us.
    - To submit a support ticket, click on Click Here to Submit a Support Ticket(http://support.cedcommerce.com/)
    - To contact us via mail, click Click Here to Contact us through Mail(mailto:danmorris@cedcommerce.com)
    - To reach us through Skype, click Click to connect with us over skype(skype:live:bobjohn_18;live:danmorris_7;?chat&topic=http://192.168.0.192/magento/1.9.2/shopify/)