

Accelerate – Shopify Product and Customer Data Management

ACCELERATE

This document will cover the best practices for managing your Product & Customer data in Shopify so that it can be sync'd into RepSpark. Shopify will be the "source of truth" for all of your product and customer data, so all data manipulation will occur in Shopify before attempting to sync that data into RepSpark.

To sync your data to RepSpark, we require the use of tags.

Updating Products in Shopify with RepSpark Tags

- By default, ALL products in your Shopify system will be synced to your RepSpark site if you do not add Tags to let us know which ones to add and which ones to ignore.
- You may not want every item, or entire groups of items on your B2B site for wholesale purposes, so we have a tagging system that will allow you to select which products to omit from the sync
- There are only 2 Tags related to products. In 99% of cases, you will either assign one tag or the other to a product, but not both
- Be sure to press SAVE after adding product tags.

This image shows a properly configured Product ready to sync into RepSpark

RepSpark

Search

BM Bobby Morgan

Home

Orders 2

Products

All products

Inventory

Transfers

Collections

Gift cards

Customers

Analytics

Marketing

Discounts

Apps

SALES CHANNELS

Online

Blue Knit Belt

Media

Add media from URL

Add media or drop files to upload

Online Store

Schedule availability

Insights

Insights will display when the product has had recent sales

Organization

Product type

Accessories

Vendor

RepSpark

COLLECTIONS

Search for collections

Add this product to a collection so it's easy to find in your store.

TAGS

View all tags

Vintage, cotton, summer

WholesalePrice:17.50 X

More options

Size

Price

Quantity

Incoming

Add WholesalePrice tag in the Tags section of the Product edit page.

Do not include the \$ sign in the tag for WholesalePrice in this example the Tag is "WholesalePrice:17.50"

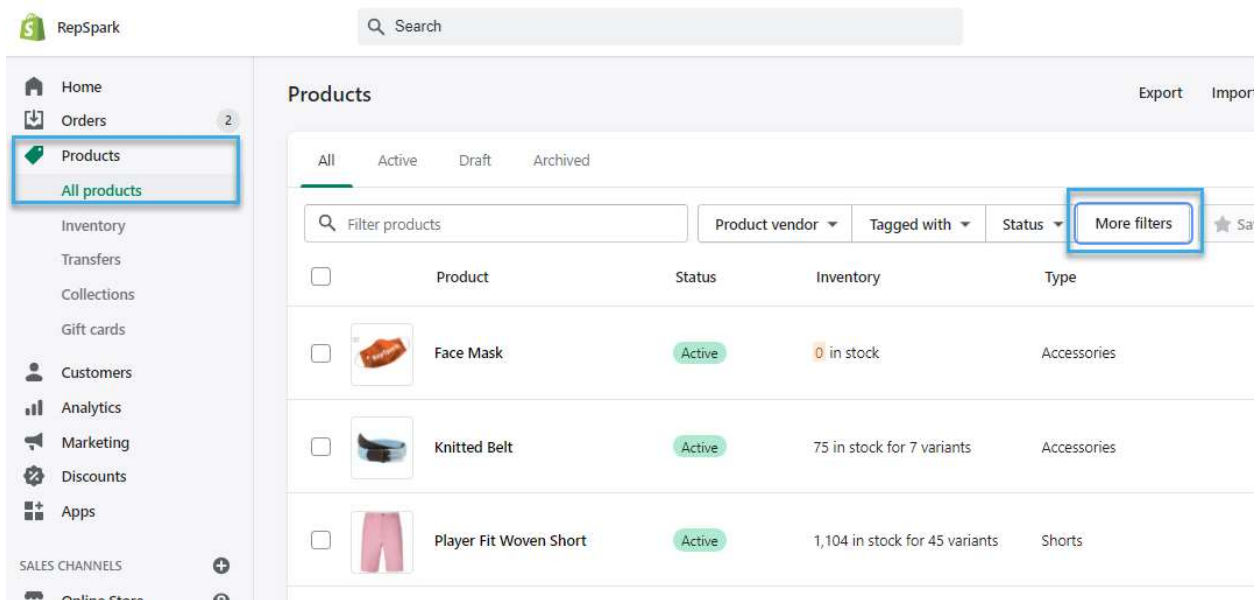
If you do not want the product to appear on RepSpark you will add a tag with the label "repspark_no"

Product Tags	Type	Format
Tag 1	Omit Product from Sync	Input
Tag 2	Wholesale Price	Input:Value

1. Tag 1 – Omit Product from Sync
 - Tag is simply **repspark_no**
 - Make sure to include the underscore
 - This denotes that a product is to be ignored from product sync
2. Tag 2 – Wholesale Price
 - This tag has 2 parts, each separated by a colon:
 - Format is **Input:Value**
 - A proper example would be **WholesalePrice:12**
 - Input is WholesalePrice
 - Value is 12
 - Do not include any special characters, like a “\$”

Using Bulk Actions in Shopify to add product tags can be a timesaver! Here’s a quick look at how you can do that for adding the repspark_no tag

1. Click Products, All Products, then More Filters
2. Select criteria, such as a “Product Type = Clothing”



3. On the Results page, click the Box to select all

4. Click More actions, then click 'Add tags'

Enable Bulk Actions for adding Product Tags

1. Use the "more filters" option to select some parameters
2. Check the Box to select all results
3. Click the "Add Tags" option to pull up a list of existing Tags or to add a new tag to all selected products.

The screenshot shows the 'Products' page with filters for 'Product type is Clothing' and '9 selected'. The 'More actions' dropdown menu is open, showing options like 'Set as active', 'Set as draft', 'Archive products', 'Delete products', 'Add available channel(s)...', 'Remove available channel(s)...', and 'Add tags'. The 'Add tags' option is highlighted.

5. Find the Tag in the list, or type it into the box and press Save

Add tags to 5 product(s) ×

Use descriptive keywords to help organize products.

Tag

EXISTING TAGS

another tag RSK Terms:Net 30 WholesalePrice:17.50 WholesalePrice:38
WholesalePrice:7 yes

Cancel Save

6. You will see these two boxes appear at the bottom of the screen

Adding one tag to product(s)... ×

Tag(s) added to products ×

7. You have now successfully added a tag to multiple products at once.
Use this to your advantage as you configure your product data!

Updating Existing Wholesale Customers Already in Shopify

- If your wholesale client information already exists in Shopify, you will just need to add the appropriate TAGS to each of the account profiles that you want to sync into RepSpark.
- Use the Custom Tags covered below to Denote Wholesale Customers and key customer account info.

This image shows a properly configured Customer Record ready to sync into RepSpark

The screenshot displays the Shopify admin interface for a customer record. The left sidebar shows the navigation menu with 'Customers' highlighted. The main content area shows the customer profile for 'Jim Jones' (Ottawa, ON, Canada). The 'Tags' section is expanded, showing a list of tags: 'VIP, sale, shopper, etc.', 'SalesRep:111:Larry Lewis', 'Shipping:Fedex:FedEx Express', 'Terms:Net30:Net 30', and 'wholesale'. A text box with an arrow points to the 'Save' button at the top right, and another text box with an arrow points to the 'Tags' section. A notification at the bottom states 'Customer has been updated'.

Annotations:

- Save Button:** A green button at the top right of the customer record page, highlighted with a blue box and an orange arrow.
- Tags Section:** A section on the right side of the customer record page, highlighted with a blue box and an orange arrow. It contains a text input field with the placeholder 'VIP, sale, shopper, etc.' and a list of tags: 'SalesRep:111:Larry Lewis', 'Shipping:Fedex:FedEx Express', 'Terms:Net30:Net 30', and 'wholesale'.

Text Box:

Add Tags Manually using the correct format.
Tags you've previously used will appear in the list for quicker editing later.
Press SAVE at the top right when finished.

Notification:

Customer has been updated

Customer Tags	Type	Format
Tag 1	Wholesale Customer Identification	Input
Tag 2	Payment Terms	Input:Value:Label
Tag 3	Shipping Terms	Input:Value:Label
Tag 4	Salesperson Code and Name	Input:Value:Label
Tag 5	Discount Percentage	Input:Value

3. Tag 1 – Wholesale Customer Identification
 - Tag is simply **wholesale**
 - This denotes that an account is B2B
 - Without this tag, a customer record will be ignored by RepSpark sync
4. Tag 2 – Payment Terms
 - This tag has 3 parts, each separated by a colon:
 - Format is **Input:Value:Label**
 - A proper example would be **Terms:Net30:Net 30**
 - Input is Terms
 - Value is Net30 (no spaces)
 - Label is Net 30 (properly formatted and spaced)
5. Tag 3 – Shipping Terms
 - This tag has 3 parts, each separated by a colon:
 - Format is **Input:Value:Label**
 - A proper example would be **Shipping:UPSG:UPS Ground**
 - Input is Shipping
 - Value is UPSG (no spaces)
 - Label is UPS Ground (properly formatted and spaced)
6. Tag 4 – Salesperson Code and Name
 - This tag has 3 parts, each separated by a colon:
 - Format is **Input:Value:Label**
 - A proper example would be **SalesRep:222:Monica Monahan**
 - Input is SalesRep
 - Value is 222 (no spaces, can be alpha and/or numeric)
 - Label is Monica Monahan (properly formatted and spaced)
 - Accounts not tagged with a SalesRep will default to code = 0000 for “In House”

7. Tag 5 – Discount Percentage

- This tag is completely optional and could vary by customer account
- This tag has 2 parts, separate by a colon:
- Format is **Input:Value**
- A proper example would be **Discount:50**
- Input is Discount
- Value is 50

Shopify Customer TAGS
 Format = FieldName:Value:Label
 be sure to separate each part with a Colon :
 ** Some fields do not need a Label

Sales Person	-	Format = SalesRep :<code>:<Name>	→	SalesRep:222:Monica Monahan X
Shipping	-	Format = Shipping :<code>:<Name>	→	Shipping:UPSG:UPS Ground X
Payment Terms	-	Format = Terms :<code>:<Name>	→	Terms:Net45:Net 45 X
Account Type	-	Format = Wholesale **this tag is just a single value	→	wholesale X

The screenshot shows the 'Tags' section of a Shopify customer profile. On the left, a text box explains the tag format: 'Format = FieldName:Value:Label' and 'be sure to separate each part with a Colon :'. It also notes that some fields do not need a label. Below this, a table lists four fields: Sales Person, Shipping, Payment Terms, and Account Type, each with its corresponding tag format. Arrows point from these formats to the actual tags displayed on the right: 'SalesRep:222:Monica Monahan', 'Shipping:UPSG:UPS Ground', 'Terms:Net45:Net 45', and 'wholesale'. Each tag has a small 'X' icon to its right.

Creating New Wholesale Customers in Shopify

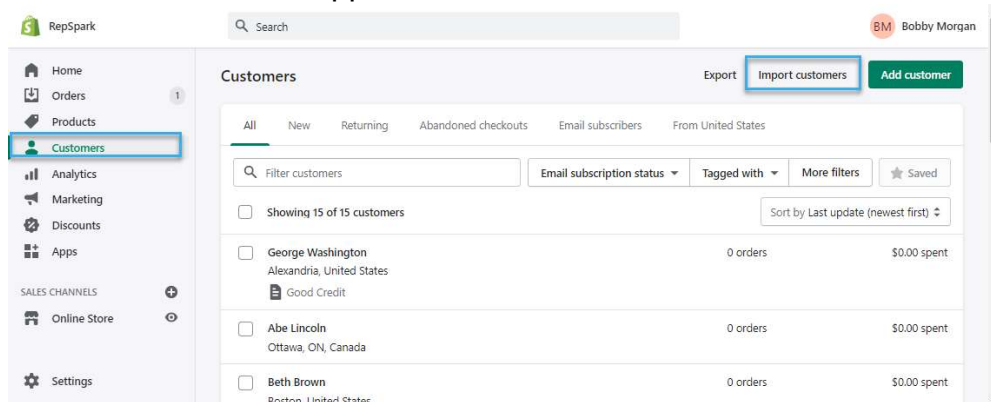
There are two methods for managing your customer records in Shopify. You can use the manual entry by clicking the “Add Customer” button or you can use the Bulk Upload filling out a data file

1. Manual Entry

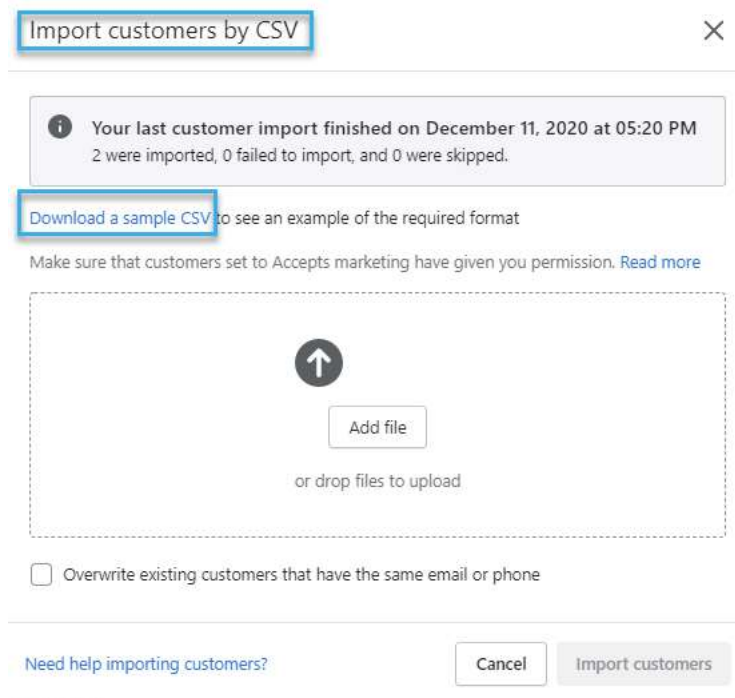
- This is a one-by-one approach.
- Click “Add Customer”
- Fill in all contact information
- Add TAGS as described in Section 1 of this document
- Save and repeat.

2. Bulk Upload using a data file

- This is a multi-record approach.



- Click Import Customers to open a popup box



- Download the Sample CSV file and save it
- It is recommended you rename it to something like “wholesale customers” and with a date, so it might be “*wholesale_customers_12.15.20.csv*”
- DO NOT ALTER** any of the Column Names or remove any columns. This will cause your import to fail. Just fill out the sheet as is.

- The data sheet is mostly straight forward, but there are a couple of fields that need to be mentioned.
 1. Column H – Province
 - a. This is the same as STATE for US customers
 - b. Full spelling, such as Texas
 2. Column I – Province Code is the short code
 - a. This would be TX (instead of Texas)
 3. Columns N, O, P, and R
 - a. These can be left blank
 4. Column Q – TAGS
 - a. **This one is very important for efficient setup of your wholesale accounts to be sync'd into RepSpark. Follow these steps carefully.**
 - b. Refer to Section 1 for proper Tag format and requirements
 - c. Add Tags separated by Commas.
 - d. Make sure to be accurate!
 - e. Example: *wholesale, Terms:Net30:Net 30, Shipping:UPSG:UPS Ground, SalesRep:222:Monica Monahan*
 - f. This example contains Four (4) tags, each separated by a comma.
 - g. When uploaded, each tag will be automatically created when the record is generated in Shopify
- Fill out additional rows for each new customer.
- Save file when finished.

- Upload Your File into the drop area

Import customers by CSV

Your last customer import was successful. 2 were imported, 0 failed to import.

[Download a sample CSV](#) to see an example of the required format.

Make sure that customers set to Accepts marketing have given you permission. [Read more](#)

Drag and Drop the CSV file or,
Click Add File button to select from local machine

Add file

or drop files to upload

☐ Overwrite existing customers that have the same email or phone

[Need help importing customers?](#) Cancel Import customers

- Press Import Customers Button, Leave the “overwrite existing customers...” box unchecked.

Import customers by CSV

[Download a sample CSV](#) to see an example of the required format

Added file:

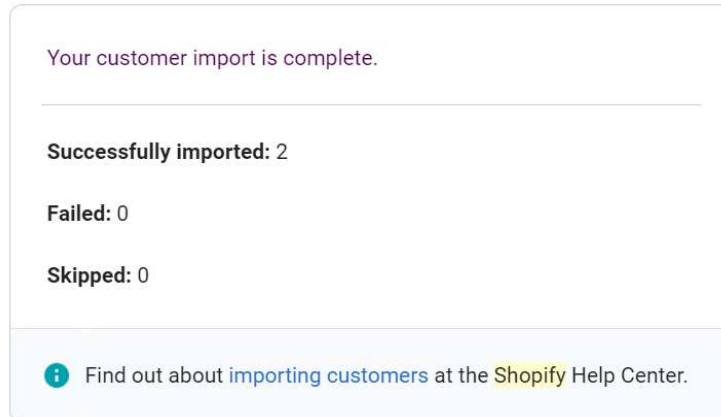
Customers_Shopify_List2.csv Replace file

Make sure that customers set to Accepts marketing have given you permission. [Read more](#)

☐ Overwrite existing customers that have the same email or phone

[Need help importing customers?](#) Cancel Import customers

- You will receive an email with the results of your import



- After successful import, return to the Shopify admin "Customers" section and view your newly created accounts. Each of them should look just like the picture at the top of this document, with the RepSpark tags showing in the lower right area.
- If your tags did not come out 100% correct, take the following steps:
 1. Make a COPY of the same sheet you just uploaded.
 2. Call it, `previous_sheet_name_v2.csv`
 3. Make your edits on the v2 document and SAVE
 4. Return to the Import Customers page and reupload this document, but this time be sure to CHECK the BOX for Overwrite existing customers...
 5. This will update those records with the previous data errors

Import your Wholesale Customer Data into RepSpark

1. Once your accounts are properly tagged, return to the Admin Dashboard in RepSpark
2. Click on the Connect Data Tab
3. Make sure your data connection is still set to Shopify
4. In the bottom section, click on "Sync Customers" button

5. Be patient will customer import runs. When finished a message will appear in upper right corner letting you know of success or failure.

Connect Data

Integration

Your account is ready to be customized. Let's start by integrating you in. Choose from one of the options below to import your data from Shopify

https://repspark.myshopify.com

.....

SAVE

✓ **Your Shopify connection is ready to go!**
Configure your syncs to run automatically [here](#)

Sync Products

Sync Assets

Sync Manager

Setup your customer and order syncs here, or setup automatic syncs

Enable Customer Sync ☒

Enable Report Sync ☒

Enable Auto Sync ☒

SAVE

Sync Customers

Sync Reports

From the 'Connect Data' Section

Use the "Sync Customers" button to import Shopify Customer data.

The records must contain specific TAGS as described in the configuration documents.

If properly configured, these customer accounts will be ready for Order Creation in RepSpark!!

6. You can rerun the sync any time you wish to pull in new Customer data from Shopify.
7. NOTE: this sync is not scheduled to run automatically, so you'll need to manually sync if an account is missing from RepSpark. Just make sure the record exists in Shopify first and are properly tagged.