Bexio Connecter



Developed by

Pit Solutions Private Limited



Table of Contents

1.0 Ab	out Bexio Connecter	2
2.0 Ap	p Setup	2
3.0 Me	enus	5
3.1	Home	5
3.2	Pricing	5
3.3	Update to Bexio	6
3.4	Update to Shopify	7
4.0 Cu	istomer Syncing	9
4.1	Multiple Addresses	9
4.2	Order Syncing	
4.3	Shipping Charges	
4.4	Тах	
5.0 Se	ttings	14
5.1	Bexio Language Settings	
5.2	Shipping CHarges Text	
6.0 Cc	onstraints, Assumptions and Dependenices	
6.1	Customer Integration	
6.2	Order Integration	
7.0 St	upport	14
8.0 Ve	ersion Details	



1.0 About Bexio Connecter

Bexio Connecter is an app that aids to integrate customers and orders in Shopify and Bexio. Shopify is an ecommerce platform that allows anyone to setup an online store and sell their products. Bexio is used for managing customer information, products, and inventory.

After installing bexio connecter, the orders and customers will be automatically created in Bexio once created in Shopify. In the case of any webhook failure or api failure there is a manual option "Update to Bexio" available in Bexio Connector App for creating orders and customers in Bexio.

Order integration from Bexio to Shopify should be done manually via "Update to Shopify "button available in Bexio Connector App.

2.0 App Setup

The following page will be shown after successful installation of Bexio Connector app in Shopify admin panel

Step 1: In order to generate Access Token, click on the link mentioned "Click here to generate token in Bexio". in Please Follow Instructions section. While clicking on it, will be redirected to Bexio portal.







Step 2: After login with valid credentials in Bexio portal you can see the following page.

	👤 pits user 👻 🌣 Settings 👻
s न Banking Accounting न Apps न Payroll ि	Q Quick find
	Generate token
oken Descript	ion
yJraWQiOil2ZGM2YmJIOC1iMjZjLTExZTgtOGUwZC0wM	÷
yJraWQiOil2ZGM2YmJIOC1iMjZjLTExZTgtOGUwZC0wM 🖞 Test	:
	s Banking Accounting Apps Payrol1

Fig 2 – Generate API token in Bexio

Step 3: Click on Generate Token button. A popup window will be shown as in Fig 3. Enter the mandatory field name as you want and click Save button.

Name *		
INGING		
Name is require	d.	
Description		
		/

Fig 3 - API token creation window

Step 4: Copy API Token generated from https://office.bexio.com/index.php/admin/apiTokens#/



\leftarrow \rightarrow C $($ office.bexio.com/index.php/ad	lmin/apiTokens#/		🖈 f? 📀 🚋 💩 🛸 🌘
	You can continue to use bexio at no charge for 42 days. Sele	ect the desired plan whenever you are ready. Order now	
≡ bexio			1 Pit Solutions - 🔹 Settings -
🕂 Contacts Sales – Projects –	Products - Purchases - Banking Accounting -	Apps ~ Payroll IS	Q Quick find
← Back to settings			
API tokens			Generate token
Name	Token	Description	
Bexio Connecter	eyJraWQiOil2ZGM2YmJIOC1iMjZjLT	ExZTgtOGUwZC0wMj 📋	:
Test120	eyJraWQiOil2ZGM2YmJIOC1iMjZjLT	ExZTgtOGUwZC0wM]	:
	Click the a	t here to copy access token	



Step 5: Paste it on the input field and click on the submit button

	Please Follow Instructions
* Home 	Click here to generate token in Bexio.
	Click on the Generate Token button.
	Solve name of the app as Bexio Connecter.
	Now please add the Access token.
	Enter Access Token
	Paste the Access Token here Submit

Fig 5 - Paste Access token

Step 6: After clicking Submit button, APP Home page will be opened.



Oonneetor =					
	Recently Synced Orders				
_	Show entries		Search:		
	Order Number	🔶 Customer Name	🔻 Total 🍦		
_		No data available in table			
	Showing 0 to 0 of 0 entries		Previous Next		

Fig 6 – App Home page

3.0 Menus

Four menus are available in Bexio Connector APP

- Home: While Clicking on Home menu user able to see recently synced order details.
- Pricing: Here plan details are displayed and user able to purchase any of the plans mentioned.
- Update to Bexio : Here user able to update any orders from Shopify to Bexio in the case of any webhook failure or API failure.
- Update to Shopify button: Here user able to update order status from Bexio to Shopify.

3.1 Home

In home page the recently synced orders will be listed, this list will be updated at every 60 sec.

3.2 Pricing

The user can purchase any plan as per his/her needs. There are 3 plans available. Basic, Pro and Advanced.

	Daoia	Dro	Advapaged
	Basic	Pro	Advanced
	• \$100	• \$125	• \$145
	 3 Months Free support 	 6 months support 	 1 year support
	Shopify to Bexio	 Shopify to Bexio 	 Shopify to Bexio
	Syncing	Syncing	Syncing
9	 Bexio to Shopify 	Bexio to Shopify	 Bexio to Shopify
	Syncing	Syncing	Syncing
	Choose Plan	Choose Plan	Choose Plan



Fig 7 – Pricing Details

If you have already bought a basic plan, then you can migrate to Pro or Advanced plan to extend the support from our end.

Connector	You Have Purcha	used basic Plan. You get supp	ort till 2021-06-18
e	Basic	Pro	Advanced
	• \$100	• \$125	• \$145
	3 Months Free support	 6 months support 	 1 year support
io	Shopify to Bexio	 Shopify to Bexio 	 Shopify to Bexio
-:6.	Syncing	Syncing	Syncing
·	Bexio to Shopify	Bexio to Shopify	 Bexio to Shopify
	Syncing	Syncing	Syncing
	Choose Plan	Pay \$25 More	Pay \$45 More

Fig 8 – Pricing details

3.3 Update to Bexio

Update to Bexio menu allows admin to update any orders from Shopify to Bexio in the case of any webhook failure or API failure. While clicking on this menu in bexio connector app, admin able to select the date range for the display of orders that needed to be synced to Bexio.Then click on "Show orders" button available.

}	exio Connecto
Pr	icing
U	pdate to Bexio
r	Update to Shopify

Fig 9 – Update orders in Bexio Manually

Orders in that selected date range that are not synced to Bexio are displayed. Admin should be able to select maximum three orders at a time to sync to Bexio.After selecting the orders click Sync Orders button available.



Bexio Connector	2021-0	03-01 - 2021-03-04	Show	orders		
A Home						
★ Pricing	Show	✓ entries		Search:		
★ Update to Bexio		Bexio Order Title	Shopify Ord	er Number 🚽 Da	ate	÷
★ Update to Shopify		3649108803756	1097	202	:1-03-03T1{	5:24:30+05:30
		3649107427500	1096	202	1-03-03T1	5:22:32+05:30
		3649105330348	1095	202	1-03-03T1	5:19:38+05:30
		3649102545068	1094	202	:1-03-03T1	5:16:38+05:30
	Showing Select max	g 1 to 4 of 4 entries	orders		Previous	1 Next Sync Orders

Fig 10 – Update orders in Bexio – list orders

Note: If your trial period is over, then the page will look like this

Bexio Connector	Please select the Date Range Show orders
者 Home	
🖈 Pricing	Your trial period has been expired!!!
★ Update to Bexio	
★ Update to Shopify	

Fig 11 – Trial Over

3.4 Update to Shopify

Update to Shopify menu allows admin to update order status from bexio to shopify. *Note:* Inorder to update order status from bexio to shopify we must do it manually.

While clicking on Update to Shopify menu admin able to select the date range for the display of orders that needed to be synced to Shopify. Then click on "Show orders" button available.

pits			
Bexio Connector	Please select the Date Range	Show orders	
 ₩ Home ★ Pricing 			
 ★ Update to Bexio ★ Update to Shopify 			

Fig 12 - Update to Shopify

Orders in that selected date range that are not synced to Shopify are displayed. Admin should able to select maximum three orders at a time to sync to Shopify.After selecting the orders click Sync Orders button available. Then the orders and invoices status will be updated in the Shopify. Only the status of the order will be updated in Shopify.

io Connector _≡	2021-03-01 - 2021-03-26 Show orders	
ing	Show v entries	Search:
Bexio	Bexio Order Title Shopify Order Number	r 🚽 Date 🔶
ý –	☑ 3671008608428 1099	2021-03-17T21:06:06+05:30
	3649107427500 1096	2021-03-03T15:22:32+05:30
	Showing 1 to 2 of 2 entries 1 row selected	Previous 1 Next
	Select maximum 3 orders and click on Sync orders	Sync Orders

Fig 12 – Update to Shopify

4.0 Customer Syncing

When a customer created an account and then checkout or while doing a guest checkout in the store then that customer will be created in Shopify and in Bexio. The customer will be also created in Bexio when it created from Shopify admin dashboard.



The customer email id is mandatory for creating the customer in Bexio. So, ensure the email id is mandatory for the account creation in Shopify store.





4.1 Multiple Addresses

If the customer has multiple addresses, then it will be created in the additional address field of Bexio. The shipping address and billing address will also be updated there. The default address of the customer will be shown in the order and invoice under Sales section in Bexio. We can add, update and delete addresses in shopify and the changes are reflected in Bexio too.



Contacts	Sales - Projects - Produc	ts - Purchases -	Banking Accounting -	Apps - Payroll 대		Q Quick fi
ntacts)0014 - nii	mish sah 💉 💼					Import/Export
Overview	Finances Properties More			Actions 👻	Linked contacts Additiona	al addresses Bank accour
	nimish sah				4505448775841	sherin mbvhgh
	Partner Customers				4505450872993	nimish sah
					4505458311329	hakkim p
Address	test adde;test apart	Contact partner	User Pits			
	699785 test city				+ Add address	
	Show in Google Maps					
Fau	3786277585057					
Fax						



s –	Purchases	- Banking Accounting App	os - Payroll C⁵	
		Additional address	×	
	Contact pa	Designation: Recipient name: Address: Postcode: City: Country: Email address: Description: Use this address for invoices:	4505448775841 sherin mbvhgh test adde,test apart 699785 test city India Additional Address1 No	nked contacts Additio
	l	Edit Delete	No	

Fig 15 - Multiple address details

4.2 Order Syncing

The order will be automatically and manually updated while placing an order in Shopify store. Invoice will be automatically created in the Bexio at the time of order creation. The status of the order and invoice will change according to the change in the fulfilment and payment status in shopify. We have considered all the products in Shopify and Bexio are same, and it have unique name for all the products. We set the Shopify's internal order id as the title of the order and invoice.

Shopify Bexio Shopify's internal Title order id Customer Customer Currency Currency Created Date Date Product Quantity Products Amount Product Name Product Name Price Unit Price Тах Tax rate Individual price price Discount in % Total Discount

Figure 16 – Order fields Mapping

4.3 Shipping Charges

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If the store has enabled the shipping charges for the order, then it will be added as an item in Bexio. The total price should be remaining same. You can change the name of the shipping charge as per your needs.



Shirt	SFr. 150.00
Subtotal Shipping	SFr. 150.00 SFr. 19.00
Total	SFr. 169.00

Fig 17 – Shipping Charges added in Shopify

Add	standa	rd position Add product 🕂 More items 🗸					0
/pe	Item	Description	Quantity		Individual price	Discount	Price in CHF
0	1	Shirt	1.00	pc	150.00 (UN77 - Revenue (NS) 7.70%)	0.00%	150.00 Gross proceeds credit operations
		Delivery		Invo	icing		
		Quantity delivered:0.00Quantity pending:1.00		Quar	ntity invoiced:		1.00
3	2	Shipping Charges	1.00	pc	19.00 (UN77 - Revenue (NS) 7.70%)	0.00%	19.00 Gross proceeds credit operations
		Delivery		Invo	icing		
		Quantity delivered: 0.00 Quantity pending: 1.00		Quar	ntity invoiced:		1.00
		Amount excl. tax					169.00

Fig 18 – Shipping Charges added in Bexio

4.4 Tax

We have followed the tax calculation used in Shopify. Consider the following scenario, if there are two products in checkout one having tax and other haven't. Also, product price did not include the tax, that tax will be calculated in the checkout.



Shirt	SFr. 150.00
frock	SFr. 500.00
Subtotal	SFr. 650.00
Shipping	Free
Taxes	SFr. 38.50
Total	SFr. 688.50

Fig 19 – Order Summary In Shopify

Гуре	Item	Description		Quantity		Individual price	Discount	Price in CHF	
ß	1	Shirt		1.00	рс	150.00 (UN77 - Revenue (NS) 7.70%)	0.00%	150.00 Gross proceeds credit operations	
		Delivery			Invoi	icing			
		Quantity delivered: Quantity pending:	0.00 1.00		Quar	ntity invoiced:		1.00	
11 2	2	frock		1.00	pc	538.50 (UN77 - Revenue (NS) 7.70%)	0.00%	538.50 Gross proceeds credit operations	
		Delivery			Invoi	icing			
		Quantity delivered: Quantity pending:	0.00 1.00		Quar	ntity invoiced:		1.00	
6	3	Shipping Charges		1.00	pc	0.00 (UN77 - Revenue (NS) 7.70%)	0.00%	0.00 Gross proceeds credit operations	~ ■×
		Delivery			Invoi	icing			
		Quantity delivered: Quantity pending:	0.00 1.00		Quar	ntity invoiced:		1.00	
		Amount excl. tax						688.50	

Fig 20 - Order Summary in Bexio

But in bexio tax will added to that product price. That is here there are two products

Shirt is not having tax, and frock having tax about 7.7% VAT of product price. Each product's tax will be added to the product price itself if the product is taxable and tax is not included in the product price. Order total will always same both in Shopify and Bexio.



5.0 Settings

5.1 Bexio Language Settings

By default, we are passing bexio's language as English in APIs. If you have changed the Bexio language, then you need to change the Bexio language option under the settings menu.

	Settings
# Home	
★ Pricing	Chaose Revis Language
★ Update to Bexio	Choose Bexto Language
★ Update to Shopify	Enter the shipping text you want to show in Bexio Save Shipping Text
User Guide	
★ Settings	

Fig 21 – Bexio Language Settings

5.2 Shipping Charges Text

As we mentioned earlier, we are passing shipping charges as an item/product. By default, it will be shown as "**Shipping Charges**". If you want to change this text, then you can do it under the settings menu.

Bexio Connector	Settings
者 Home	
★ Pricing	
★ Update to Bexio	Choose Bexio Language
★ Update to Shopify	Enter the shipping text you want to show in Bexio Save Shipping Text
 User Guide 	
★ Settings	

Fig 22 – Shipping Text Settings



6.0 Constraints, assumptions & dependencies

6.1 Customer Integration

- We have set the email as mandatory for customers and it should be unique. All the mappings are done in the basis of the email id of the customer.
- In Bexio the fax number is set to the Shopify's internal customer id. Because while editing or deleting Shopify returns only this id.

6.2 Order Integration

- Shopify's internal order id will be set as the title of the order and invoice.
- The product name should be same and must be unique in the Shopify and Bexio,
- We can only consider either all the products have tax or not.
- The shipping address and billing address will be added to the multiple address field of the customer.
- Orders delete and cancel from Shopify to Bexio is not considered.
- Normally it takes 2-5 min delay for syncing orders from Shopify to Bexio.

7.0 Support

If you need support, please write to us at pitscustomersupport@webshopextension.com

8.0 Version Details

SI. no	Version	Details Of Changes
1	V1.0.0	Initial Release
2	V1.0.1	 Added Settings Menu Store admin can manage the shipping changes text and Bexio Language. More details under 5.0 section