# Bexio Connecter

Developed by

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# 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.
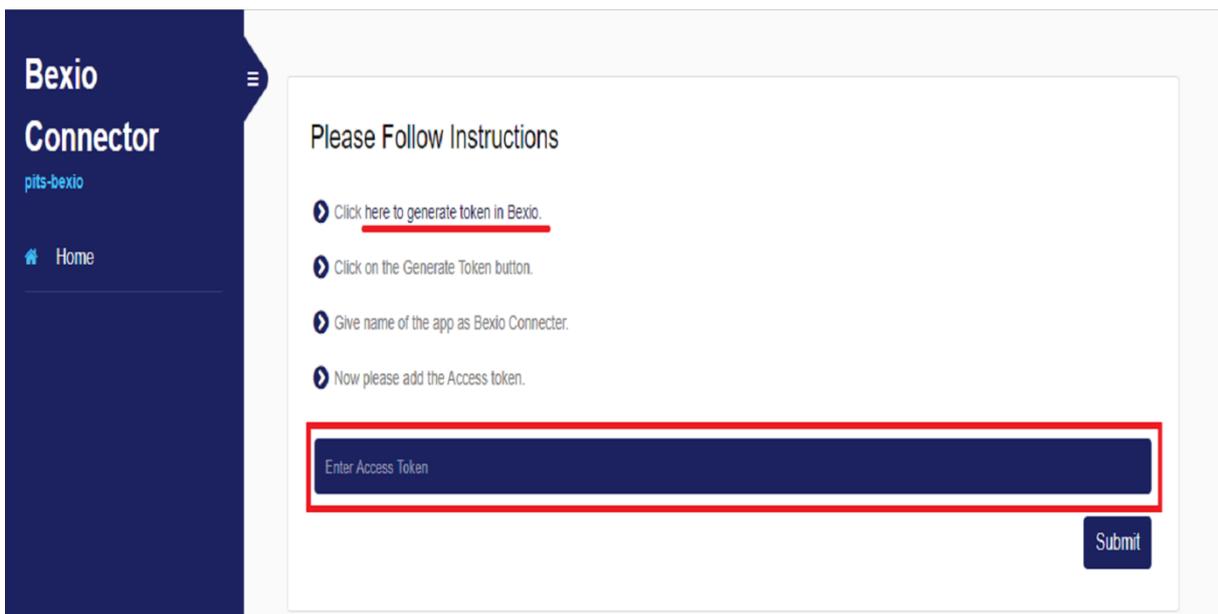


Fig 1 – Installation page

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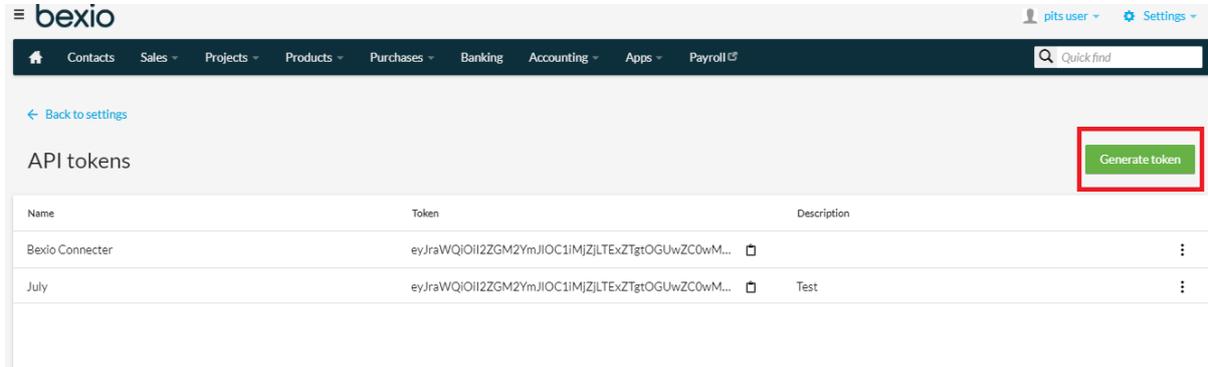


**Fig 2 – Generate API token in Bexio**

**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.
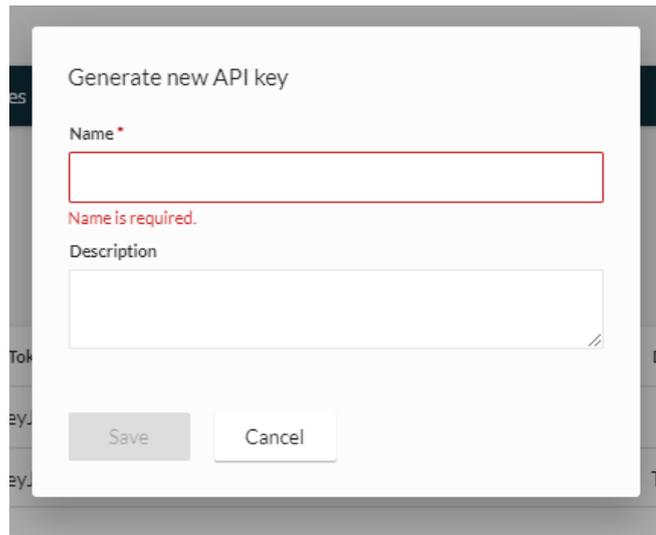


**Fig 3 – API token creation window**

**Step 4:** Copy API Token generated from
https://office.bexio.com/index.php/admin/apiTokens#/
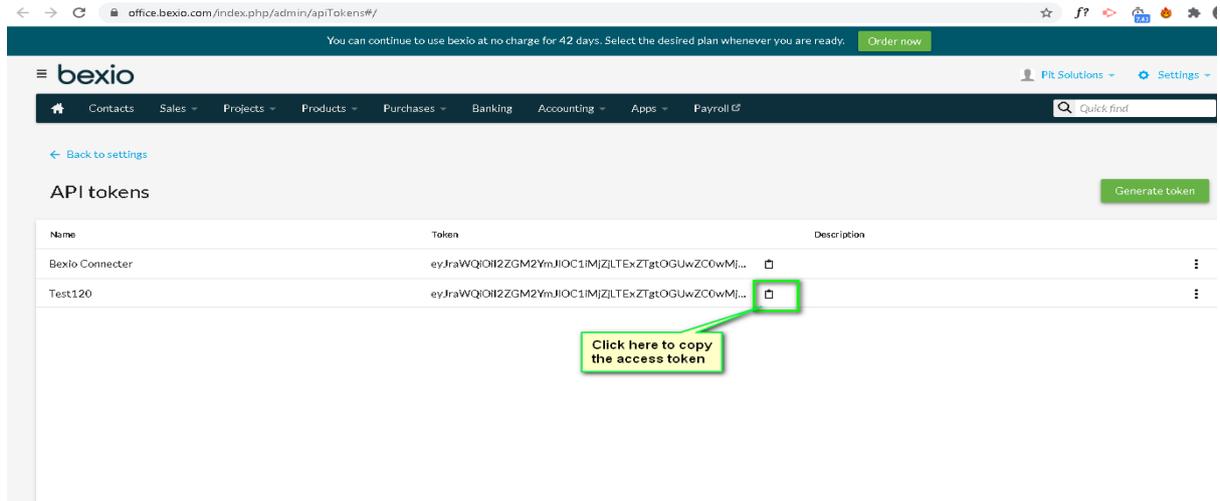
Fig 4 – Bexio Api tokens list

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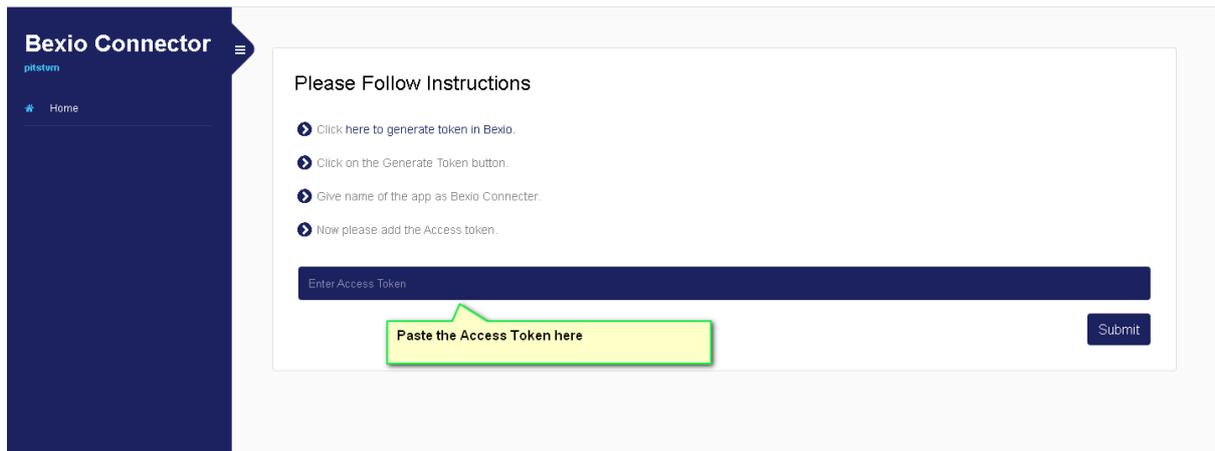


Fig 5 – Paste Access token

**Step 6:** After clicking Submit button, APP Home page will be opened.
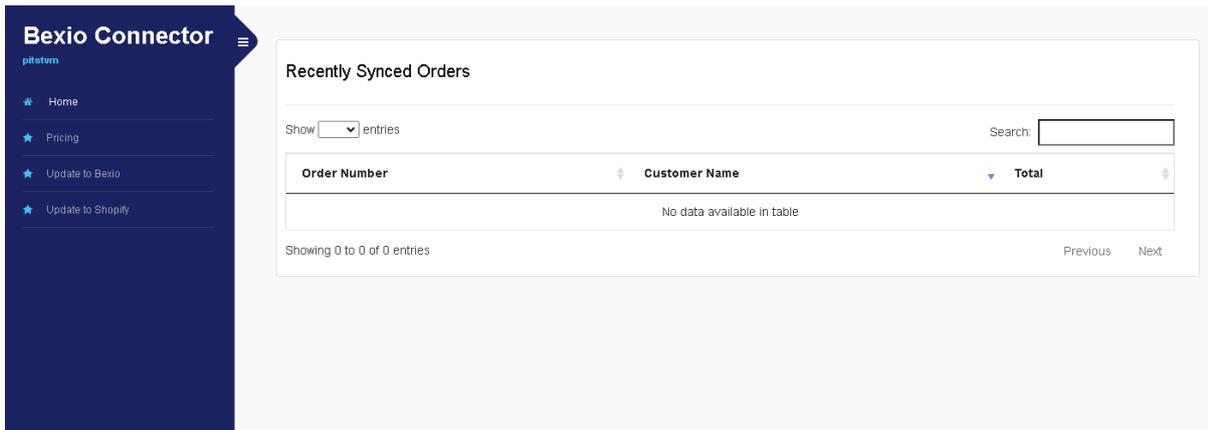
Fig 6 – App Home page

## 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.
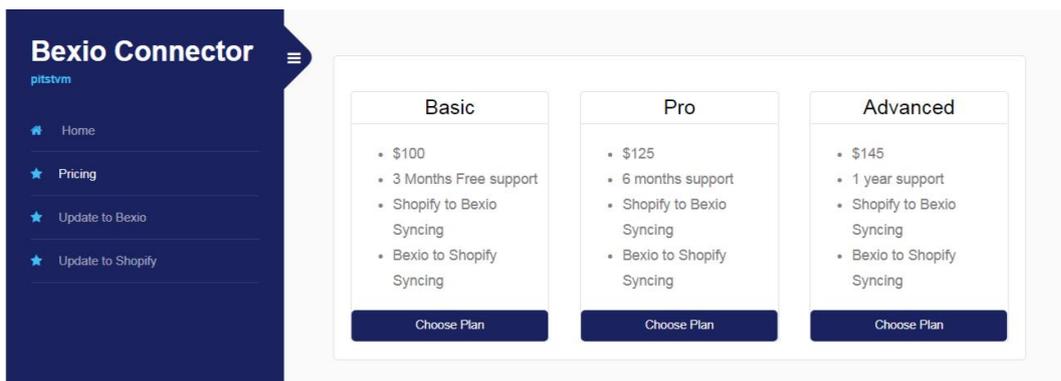
Fig 7 – Pricing Details

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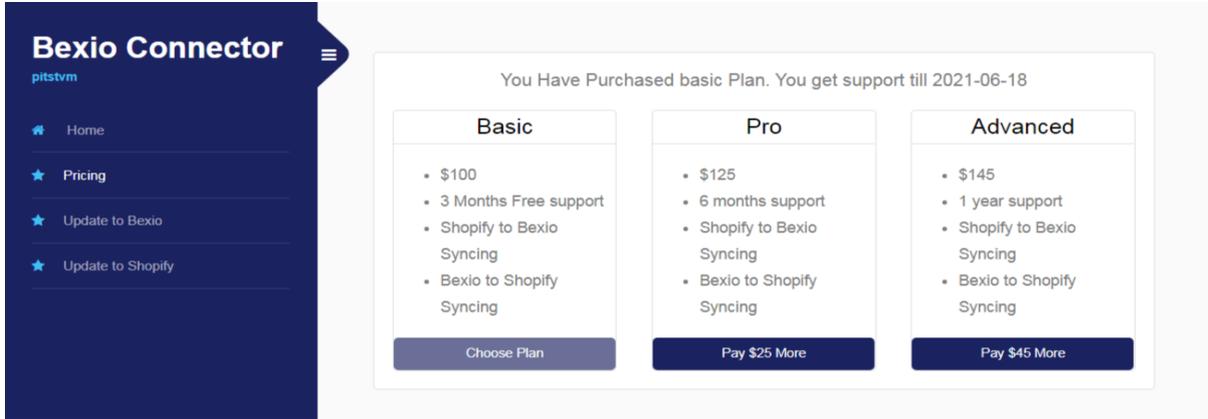


Fig 8 – Pricing details

## 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.
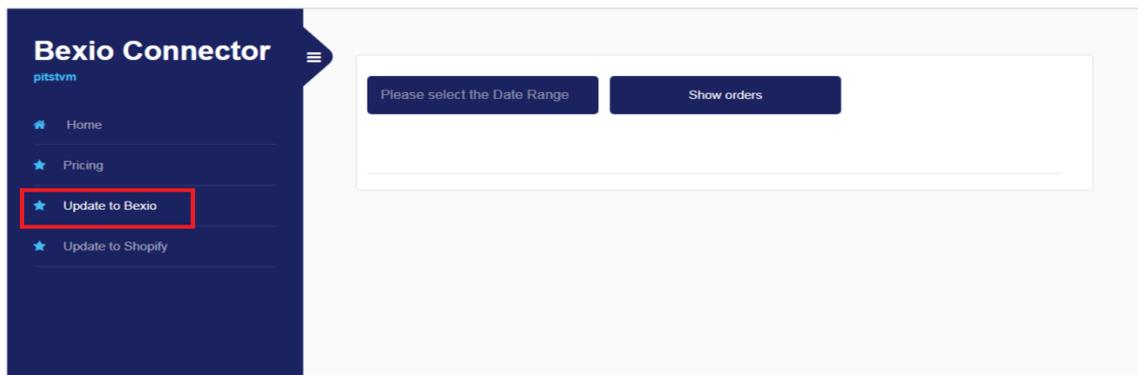


Fig 9 – Update orders in Bexio Manually

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.
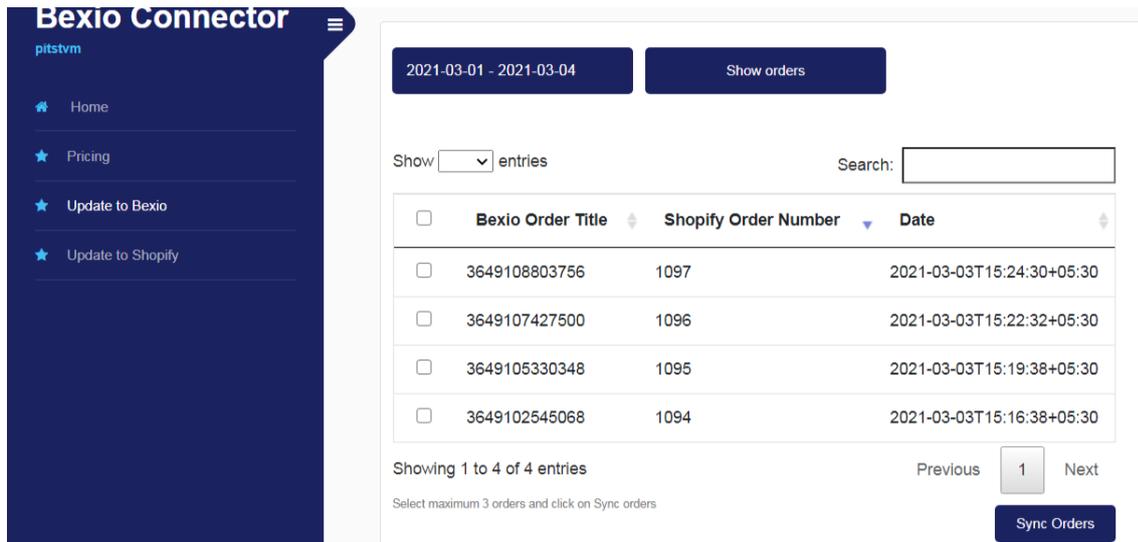
Fig 10 – Update orders in Bexio – list orders

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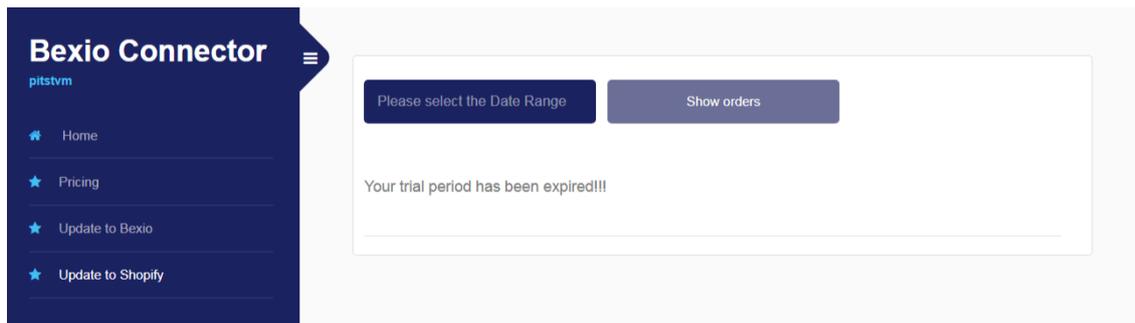


Fig 11 – Trial Over

## 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.
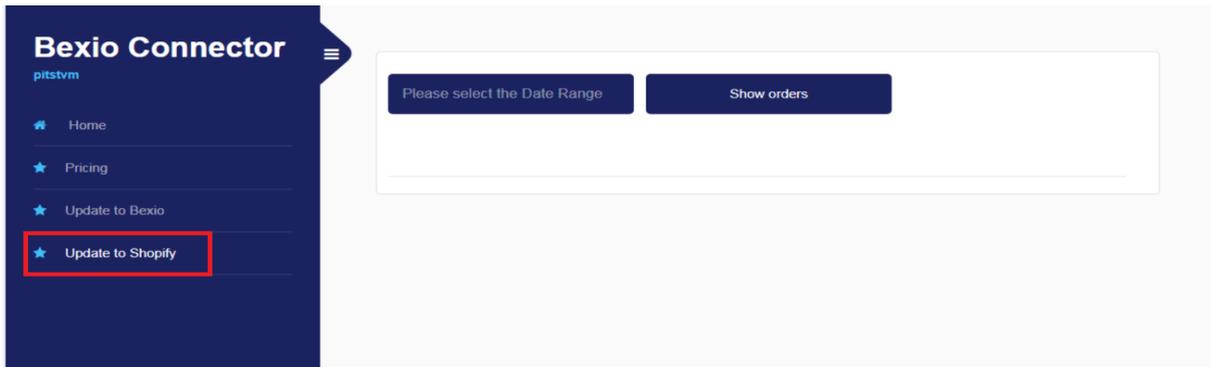
Fig 12 – Update to Shopify

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.
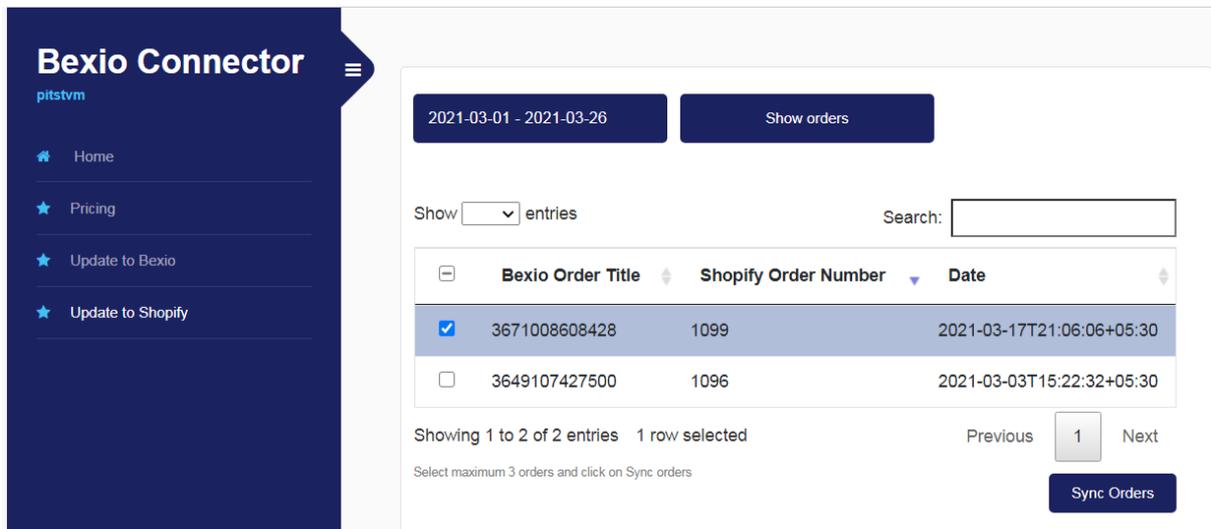


Fig 12 – Update to Shopify

## 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.
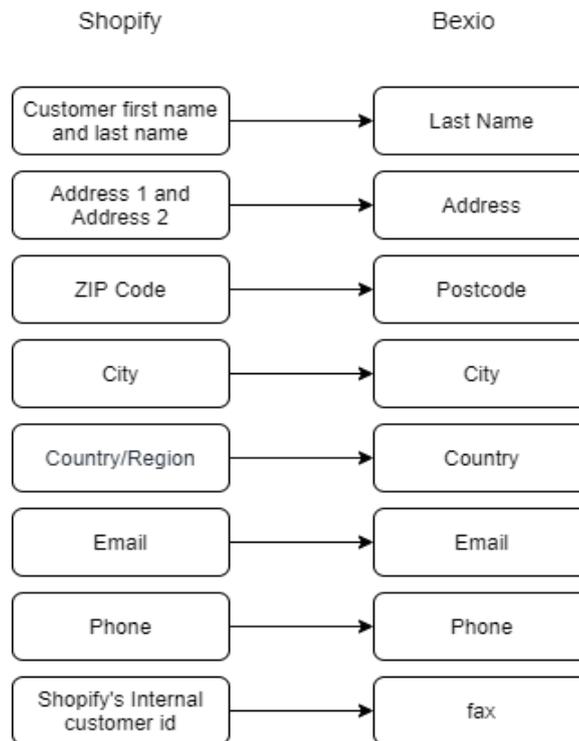


Figure 13 – Customer fields Mapping

## 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.
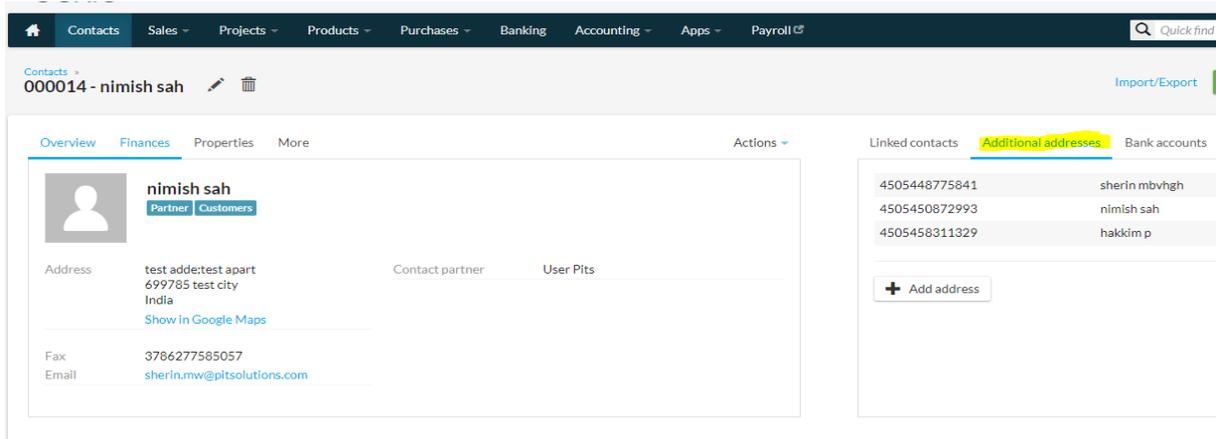
Fig 14 – Bexio Customer Detail page
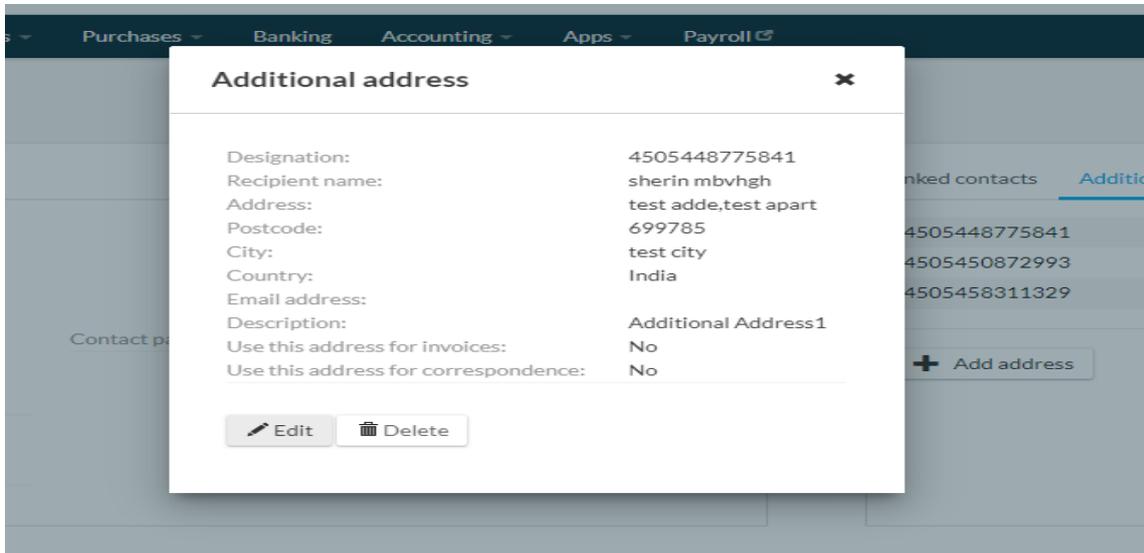


Fig 15 – Multiple address details

## 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.
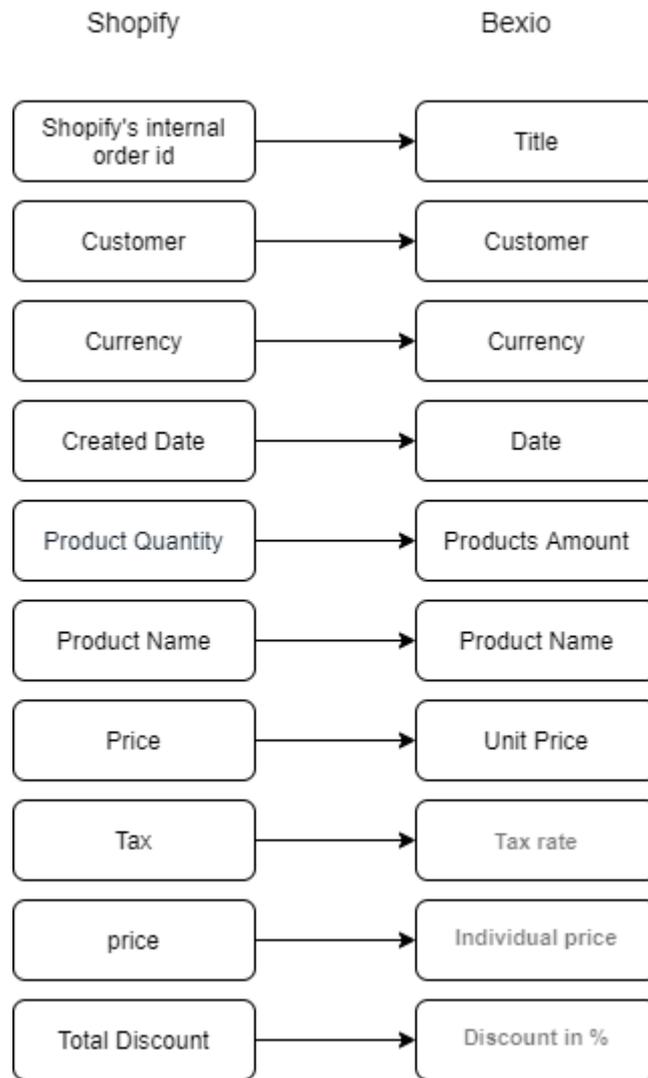
Figure 16 – Order fields Mapping

## 4.3 Shipping Charges

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.

Fig 17 – Shipping Charges added in Shopify



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.

Fig 19 – Order Summary In Shopify



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.
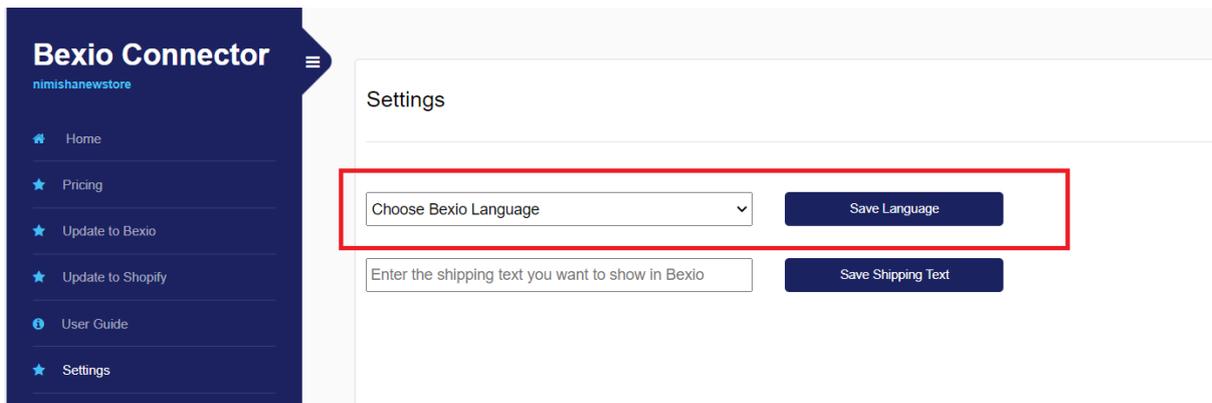


Fig 21 – Bexio Language Settings

### 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.
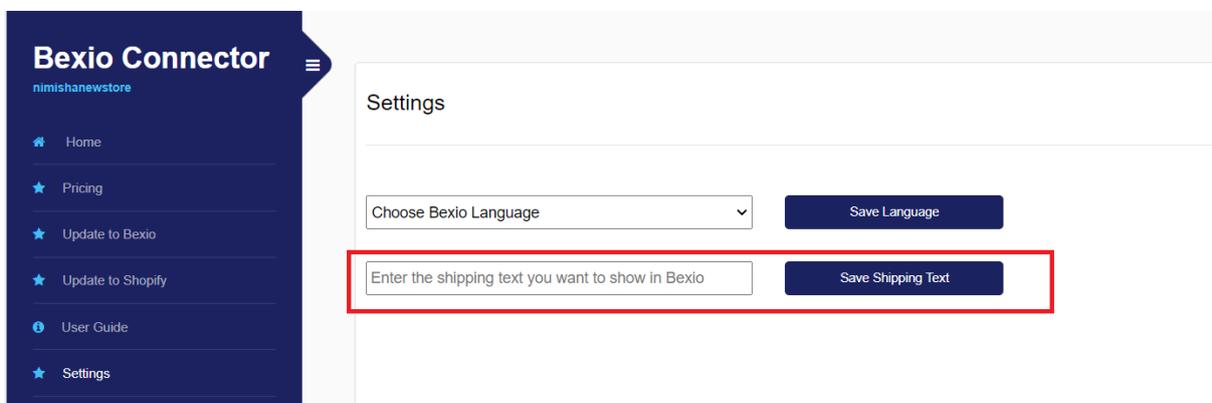


Fig 22 – Shipping Text Settings

# 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

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