

Getting started with ...

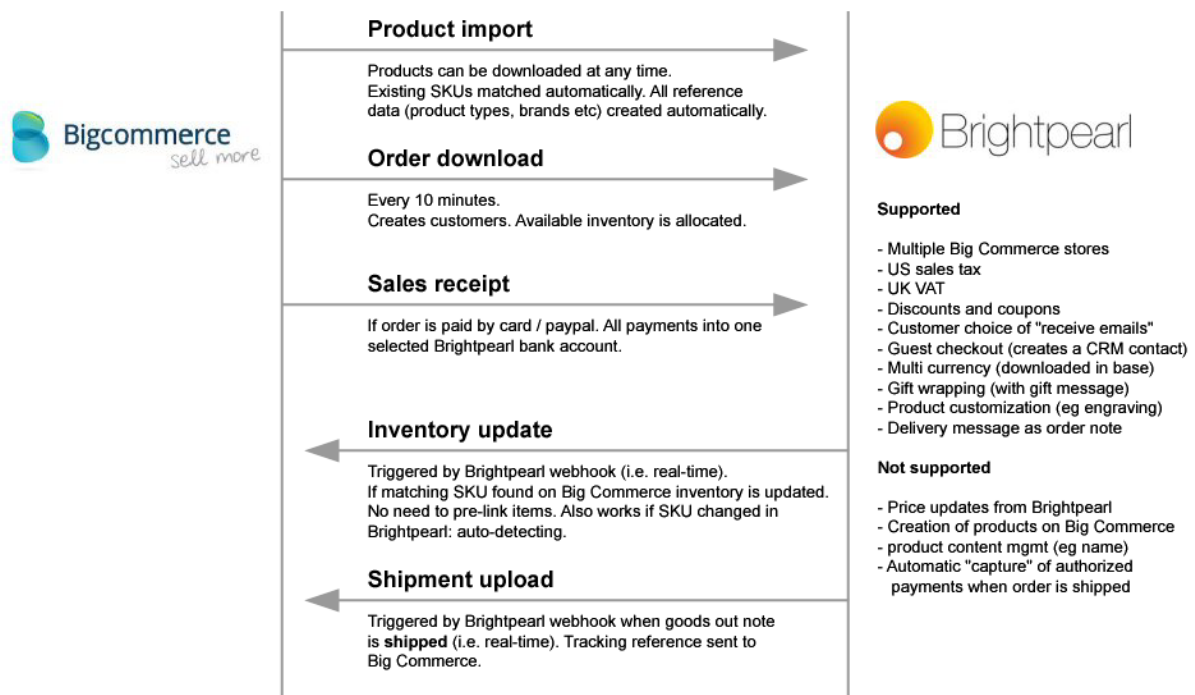
# Bigcommerce and Brightpearl

1.0



Brightpearl

This guide will walk you through the process of getting your Bigcommerce account integrated with Brightpearl. Orders will be downloaded into Brightpearl, any inventory will be allocated to the sale, and all your sales channels will be updated to reflect the new "on hand" inventory level. When you update inventory or allocate inventory to sales on other channels, your Bigcommerce store will also be updated. Here's a graphic of what the integration does.



Take a note of the features that are NOT supported; please get in touch with us if these are essential to your store operation.

The first thing you'll need to do is create a sales channel for Bigcommerce. Then you'll connect your store to that channel. If you want, you can then download your Bigcommerce products into Brightpearl.

## 1. Before you start - check your SKUs

The integration relies on both your Brightpearl account and Bigcommerce account having products with matching SKUs. If a product doesn't have a SKU, inventory cannot be synchronized, and it won't be added to sales orders. There are a few other things you should check on your Bigcommerce account before you download products or activate the integration. Have a look at the end of this guide for full details.

*Don't skip this step. Your integration relies on good, clean product data.*

## 2. Preparing your Bigcommerce account

There are some things you should check before you download products or activate the integration.

### Inventory settings

All products for which you want to track inventory should be set to "track inventory", or "track inventory by options". If you are tracking inventory by options for a product, then the product must have SKUs - add these in the "options" tab. Similarly, if you have SKUs, you must select "Track inventory by options":

Details Images & Videos Delivery/Event Date **Inventory** Options Custom Fields Google Shopping

### Inventory Tracking

You can track inventory for your products by first choosing an option from those shown below. You will then be able to up

Tracking Method

- ☐ Do not track inventory for this product *i*
- ☐ Track inventory for this product
- ☒ Track inventory by options (from the 'Options' tab above)

Make sure that each physical item (that has an inventory level) is set up as a separate product, or else is a SKU within a product that's set to "track inventory by options":

Details Images & Videos Delivery/Event Date **Inventory** **Options** Custom Fields Google Shopping

### Product Options

Option Set  
**SKUs**  
Rules

Create a SKU Or -- Choose an Action --

<input type="checkbox"/>	SKU	UPC	Option(s)	Cost Price	Bin Pi
<input type="checkbox"/>	281666-2X		Choose a size: XX-Large	£0.00	
<input type="checkbox"/>	281666-3X		Choose a size: XXX-Large	£0.00	
<input type="checkbox"/>	281666-XL		Choose a size: X-Large	£0.00	
<input type="checkbox"/>	281666-M		Choose a size: Medium	£0.00	
<input type="checkbox"/>	281666-S		Choose a size: Small	£0.00	
<input type="checkbox"/>	281666-XS		Choose a size: Extra Small	£0.00	

Custom options (set in the "Custom fields" tab of the product edit screen on Bigcommerce) are **not suitable for inventory tracking**.

## SKUs

All products will need a SKU, and the SKU must be unique. If you don't yet have SKUs, or want to take this opportunity to re-SKU your product range, have a look at our Commerce Acceleration 101 guide "[Understanding SKUs](#)", which gives you essential information such as not using a leading zero (because of subsequent trouble with Excel). To see how to update your Bigcommerce SKUs in bulk, have a look at the Bigcommerce documentation.

## Product options

Bigcommerce users generally end up with a lot of different product options; different types of sizes for example. You might have "Sizes S, M, L", "All sizes", "Shirt sizes" and so on. When your products are downloaded into Brightpearl, we create the options and option values automatically - the

important thing to note is that we use the Bigcommerce *display name* for the option when deciding whether to create a new option in Brightpearl. If you want, your Brightpearl account can just have "Size" for your multiple Bigcommerce sizes, as long as you update your Bigcommerce option display name to "Size" before the download.

### **Tax codes**

Bigcommerce lets you create different tax codes for shipping and gift wrapping. Brightpearl downloads orders with lines being either taxable or non taxable, so we recommend that you set the tax code for your shipping and gift wrapping to "taxable".

### **Currency**

Your Bigcommerce store needs to have its default currency being the same as your Brightpearl account.

## **3. Preparing your Brightpearl account**

Before you activate the integration or download products, check the following settings in your Brightpearl account.

### **Tax scheme**

From Setup > Company > Accounting : Tax, choose whether you are VAT based or Sales Tax based. If you can't change this, it's because you've already entered accounting transactions. To switch it to the correct setting, please contact us : [support@brightpearl.com](mailto:support@brightpearl.com)

### **Default tax code (VAT based Brightpearl accounts)**

When taxable products are downloaded, they are set to a Brightpearl tax code - this is the company default tax code which you can choose at Setup > Company > Accounting : Tax. Usually in the UK this is T20 (20%).

### **Price lists**

When downloading products, the sell price on Bigcommerce will be entered into the price list you have set for the channel. Prices in Bigcommerce are always entered excluding tax. If your Brightpearl price is set to show including tax, prices will be underlined and will include tax at the rate defined by your company default tax rate.

Your Bigcommerce cost price will also be downloaded into Brightpearl; into your default cost price list which is set in Brightpearl at Setup > Purchases > Purchase defaults.

### **SKUs**

If you've already got products in Brightpearl; perhaps you've imported from another sales channel already, or imported from Excel, make sure that any items in both Bigcommerce and Brightpearl have the same SKUs. Otherwise, when you import from Bigcommerce you'll get loads of duplicate products.

## **4. Add a channel**

Add a new Bigcommerce channel at Channels > Manage channels. If you want, you can create a price list for this channel beforehand at Setup > Products > Price lists. Note that Brightpearl does not update prices on Bigcommerce; this price list is assigned to customers and orders created from your Bigcommerce channel.

## 5. Add a store

Now that you've created a Bigcommerce channel, you can access the connector setup process at Setup > Integrations > List integrations. Scroll down to Bigcommerce and click settings.

1. Log into the ecommerce connector using the same details you use to log into your Brightpearl account. You'll need to have API access for this to work (all users on your Brightpearl account automatically have API access)
2. Click to add a store
3. Enter your Bigcommerce API details. You can get these from your Bigcommerce account from the "Users" setup area. You can either create a new user, or get the API details for an existing user account.
4. Save the settings. You've now connected your store! Nothing will happen until you activate the integration, however. Update your connector settings from the screen reached from Actions > Settings.

## 6. Download products into Brightpearl

If your Bigcommerce store contains more products than your Brightpearl account, you can use the connector to download them into Brightpearl. Log into the connector screen and from the "actions" menu choose "Import products".

*Make sure that you have cleaned up your product data in Bigcommerce first.*

For more information on this process, have a look at our [documentation](#).

### Cost prices

Brightpearl needs cost prices in order to give you accurate margin reports and accurate accounting. As soon as you increase inventory levels, you are increasing your assets, so your Balance Sheet figures will change based on your product cost prices. Similarly, when you sell items, the Cost of Goods Sold depends on the inventory cost price. Even if you are not planning to use Brightpearl for accounting, you should enter accurate cost prices in case you want to use the accounting features later. If your Bigcommerce store contains accurate cost prices, you can skip this step, since they will be imported into Brightpearl for you.

[Read more about importing cost prices here.](#)

## 7. Import accurate inventory levels into Brightpearl

Once all your products are in Brightpearl, you can run a stock take. If your Bigcommerce inventory levels are already accurate, you can export from Bigcommerce and import into Brightpearl. [Here's how to do it](#). Once your Brightpearl inventory levels are correct, you can switch on the inventory sync, after which every change to Brightpearl's "on hand" inventory levels will be pushed to Bigcommerce.

## 8. Activate the inventory sync

Log into the ecommerce connector at Setup > Integrations > List integrations and click "settings" on the Bigcommerce line. Edit the settings for the relevant store to turn on inventory synchronization.

*Note that this will not make any changes to your ekmPowershop store until the next inventory change is made on Brightpearl.*

If you want to synchronize ALL product inventory levels with Bigcommerce now, you can choose "Synchronize inventory levels" from your ecommerce connector dashboard. This will use your Brightpearl stock levels to update your store. It will take a couple of hours if you have a few thousand SKUs due to API speed limits on both sides of the integration.

## **9. Shipping methods**

In order to streamline your fulfilment processes (creating shipments / goods out notes from sales orders), you need to have an order shipping method set. Brightpearl will add the customer's chosen shipping method as an order line, but the goods out note will be created from the order shipping method. If a Brightpearl shipping method exists with the same name as the store shipping method (e.g. "Standard Shipping") then the order will be set to this shipping method in Brightpearl when it's downloaded.

Add your shipping methods at Setup > Shipping > Shipping methods.

## **10. Fulfilling a sale**

When a sale is downloaded into Brightpearl, any available stock will be allocated to the sale. This reduces the "on hand" level which will be communicated to your other sales channels. In order to ship the goods, you need to create a "goods out note" from the sale, and then print/pick/pack and ship the goods out note. Read more about this process [here](#).

When you ship a goods out note, it will be created as a shipment in Bigcommerce. If you add a tracking reference to Brightpearl, it will also be sent to Bigcommerce.

## **More information**

We've got more detailed information on our website - have a good read through our [documentation](#).