Getting started with ...

Shopify and Brightpearl

1.1

Brightpearl

This guide will walk you through the process of getting your Shopify 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 Shopify store will also be updated. Here's a graphic of what the integration does.
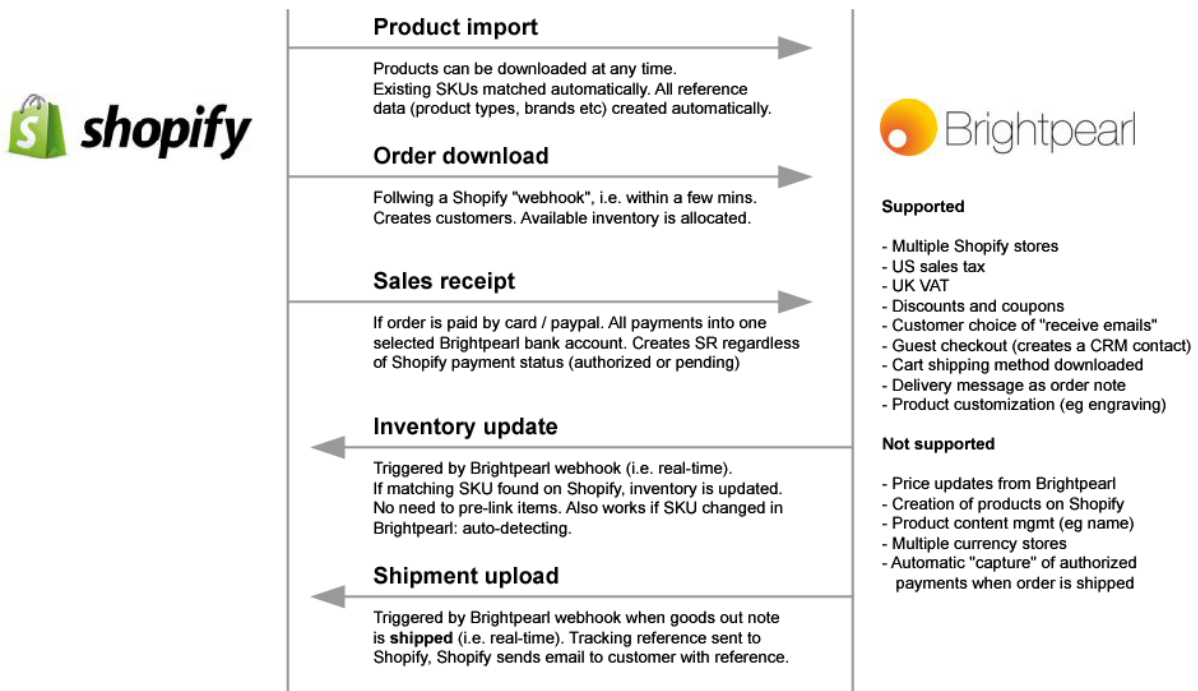
Take a note of the features that are NOT supported; please get in touch with us if these are essential to your store operation.

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

1. Before you start - check your SKUs

The integration relies on both your Brightpearl account and Shopify 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 Shopify 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 Shopify account

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

Inventory settings
When you download products into Brightpearl, all items are downloaded as stock tracked items, even if they are set to "do not track inventory" in Shopify. This is because only stock tracked items can be fulfilled or drop-shipped in Brightpearl. If you never need to ship an item - perhaps it's a downloadable product - then you can set the Brightpearl product to "not stock tracked".

SKUs (Stock Keeping Units)

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 update your Shopify SKUs in bulk, you'll need to export all products, add the SKU into the "Variant SKU" column and then re-import the file. Products without a SKU in Shopify will not be downloaded into Brightpearl.

Product names

Shopify groups variants into the same product using the "handle". Every product (group of variants) will have a unique handle. Brightpearl does a similar thing; it groups variants using the product name, which must also be unique. You can't have two products both called "Tee shirt", with Small, Medium and Large sizes in Brightpearl. One of the groups would have to have a separate name, perhaps "Men's Tee shirt". If you have different products with the same name in Shopify, only the first product will be imported. *Make any changes you need in Shopify before you import products into Brightpearl.*

Product options

Shopify is not strict with option values when you create variants, so you may have products with a variety of terms, such as "Small", "S", "Sm" and so on. When your products are downloaded into Brightpearl, we create the options and option values automatically - and each of these will be created as separate option values - but they all mean the same thing. It's harder to correct this once your products have been imported, so fix your Shopify data *before* you import into Brightpearl. Similarly, if you have products with "Option one = xxx", then update "Option one" to be something more relevant. You can fix your Shopify data easily using their export / import process and some Excel tweaking.

Tax codes

Shopify lets you create a number of different tax rates for different regions. Orders will be downloaded into Brightpearl with the tax amount as defined by Shopify, and the tax code as per your Brightpearl default tax code - *but only if the product is taxable and the customer is in a taxable region*.

Check the setting in Shopify at Settings > Taxes to see if your products are tax-inclusive (generally for b2c sites for VAT based stores) or tax-exclusive (Sales Tax based stores, and b2b VAT based stores). Brightpearl always stores prices excluding tax, so if you have set Shopify to "prices include tax", we deduct tax based on the *Brightpearl* company default tax code.

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

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 Shopify will be entered into the price list you have set for the channel.

Shopify does not have a field for cost price, so you'll need to update your Brightpearl products to have a cost price before updating inventory levels. See later in this guide for more information.

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 Shopify and Brightpearl have the same SKUs*. Otherwise, when you import from Shopify you'll get loads of duplicate products.

4. Add a channel

Add a new Shopify 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 Shopify; this price list is assigned to customers and orders created from your Shopify channel.

5. Add a store

Now that you've created a Shopify channel, you can access the connector setup process at Setup > Integrations > List integrations. Scroll down to Shopify 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 Shopify store name. You'll be taken to your Shopify admin to log in, and authenticate the Brightpearl app.
4. 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 Shopify 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 Shopify 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.

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 Shopify inventory levels are already accurate, you can export from Shopify 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 Shopify.

8. Activate the inventory sync

Log into the ecommerce connector at Setup > Integrations > List integrations and click "settings" on the Shopify 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 Shopify now, you can choose "Synchronize inventory levels" from your ecommerce connector dashboard. This will use your Brightpearl stock levels to update your Shopify 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 Shopify. If you add a tracking reference to Brightpearl, it will also be sent to Shopify, and will be sent on to the customer by email by Shopify. When all the goods out notes for an order are shipped, Shopify will mark the order as "Fulfilled".

More information

We've got more detailed information on our website - have a good read through our documentation.