



AUGUST 30, 2022

INFUSION E-COMMERCE SYNC TOOL

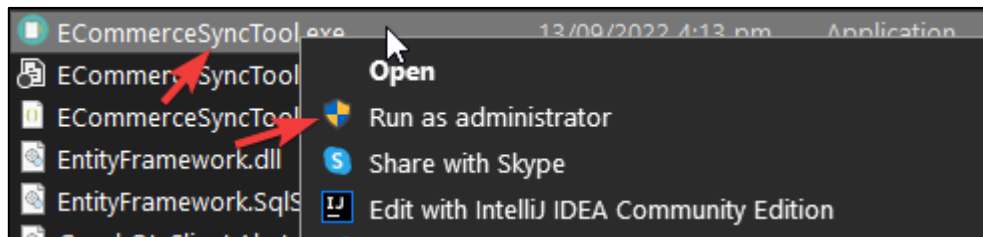
USER DOCUMENTATION

ETHAN MORRIS
INFUSION ACCOUNTING SOFTWARE

Getting Started

This tool is used to sync products from the Infusion Accounting Software to Shopify or WooCommerce. You may sync to either or both, provided you have set up the appropriate storefronts. This documentation will guide you through the setup steps for each E-Commerce platform.

The sync tool requires admin privileges to run. You can do this by right clicking the executable in the installation directory and left clicking “Run as administrator”.



If this is your first time launching the tool, you will be presented with the following screen.

General Settings

Storefronts Shopify WooCommerce

Image Sync Mode No Images Missing Images All Images

Infusion

Vendor Name

Shopify Settings

Sync Database

Account Name Account No.

Store URL Token

WooCommerce Settings

Sync Database

Account Name Account No.

Store URL Token

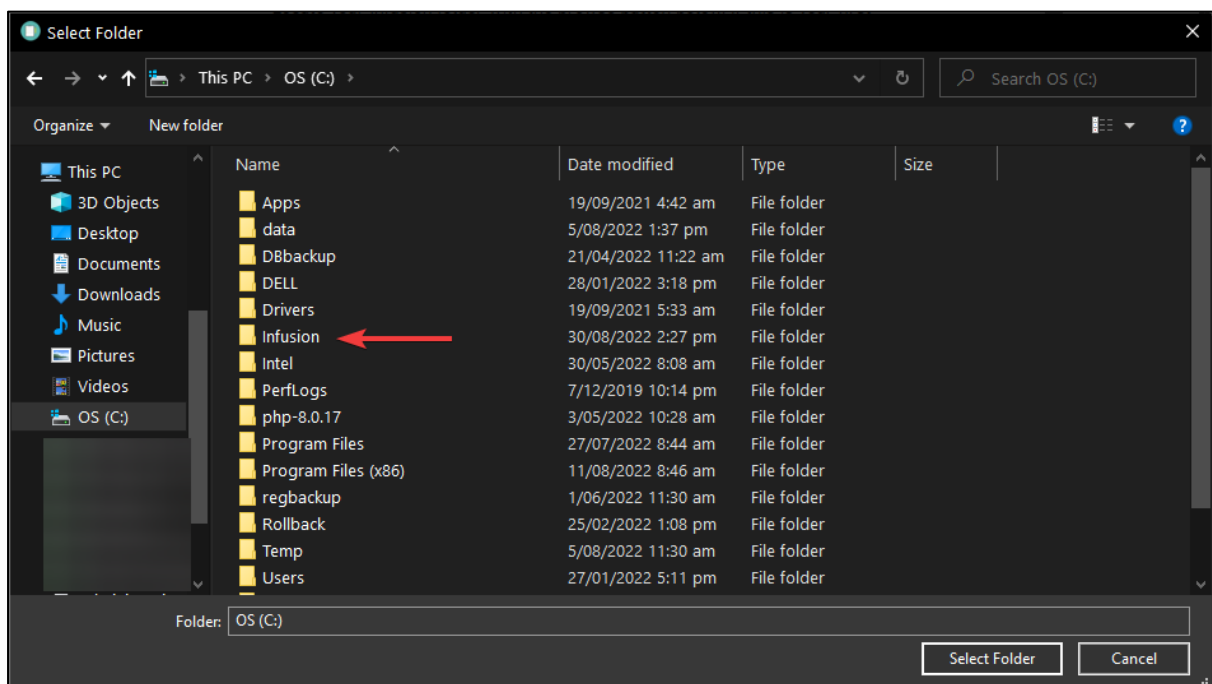
Below is a step-by-step process to configuring your E-Commerce store(s) with the sync tool.

NOTE: The WooCommerce store is still under development and currently isn't available.

General Settings

The screenshot shows the 'General Settings' window. It features several settings with numbered callouts: 1. 'Storefronts' with a 'Shopify' checkbox. 2. 'Image Sync Mode' with radio buttons for 'No Images', 'Missing Images', and 'All Images'. 3. 'Infusion' with a text input field and a 'Browse' button. 4. 'Vendor Name' with a text input field.

1. **Storefronts** – Check the Shopify checkbox to enable the Shopify settings section
2. **Image Sync Mode** – This setting will determine how the sync tool handles image uploading.
 - a. **No Images** – No images will be uploaded to Shopify.
 - b. **Missing Images** – Only missing images will be uploaded to their respective products. If you have several products that don't have an image, the tool will attempt to sync them anyway. You can change the image sync mode to **No Images** to prevent it attempting to upload images that don't exist however, you will need to change it back when you wish to upload new products or new images.
 - c. **All Images** – All images will be synced. If a product already has images on your Shopify store, it will delete those images first and re-upload them.
3. **Browse** – Locate your Infusion folder. Typically, this is located at **C:\Infusion**



The screenshot shows the 'Infusion' label and a text input field containing the path 'C:\Infusion'. A red underline is under the path. To the right is a green 'Browse' button.

4. **Vendor Name** – Enter the name you wish your store to be displayed as on the E-Commerce platforms. This is the trading name for your store and what will be displayed on search engine results.

Once the above steps are completed, your general settings should look something like below.

General Settings

Storefronts	<input checked="" type="checkbox"/> Shopify	<input type="checkbox"/> WooCommerce	
Image Sync Mode	<input type="radio"/> No Images	<input checked="" type="radio"/> Missing Images	<input type="radio"/> All Images
Infusion	<input type="text" value="C:\Infusion"/>	<input type="button" value="Browse"/>	
Vendor Name	<input type="text" value="Infusion Retail"/>		

Continue to the Shopify settings to connect your store to the sync tool.

Shopify Settings

Below are the steps for connecting your Shopify store to the sync tool and Infusion Accounting Software.

The screenshot shows a form titled "Shopify Settings" with the following fields and buttons:

- Sync Database:** A text input field with a "Browse" button to its right. A red callout bubble with the number "1" points to this field.
- Account Name:** A text input field. A red callout bubble with the number "2" points to this field.
- Account No.:** A text input field with a "Portal" button to its right. A red callout bubble with the number "3" points to this field.
- Store URL:** A text input field. A red callout bubble with the number "4" points to this field.
- Token:** A text input field with a "Portal" button to its right. A red callout bubble with the number "5" points to this field.
- A red callout bubble with the number "6" points to the "Portal" button associated with the Token field.

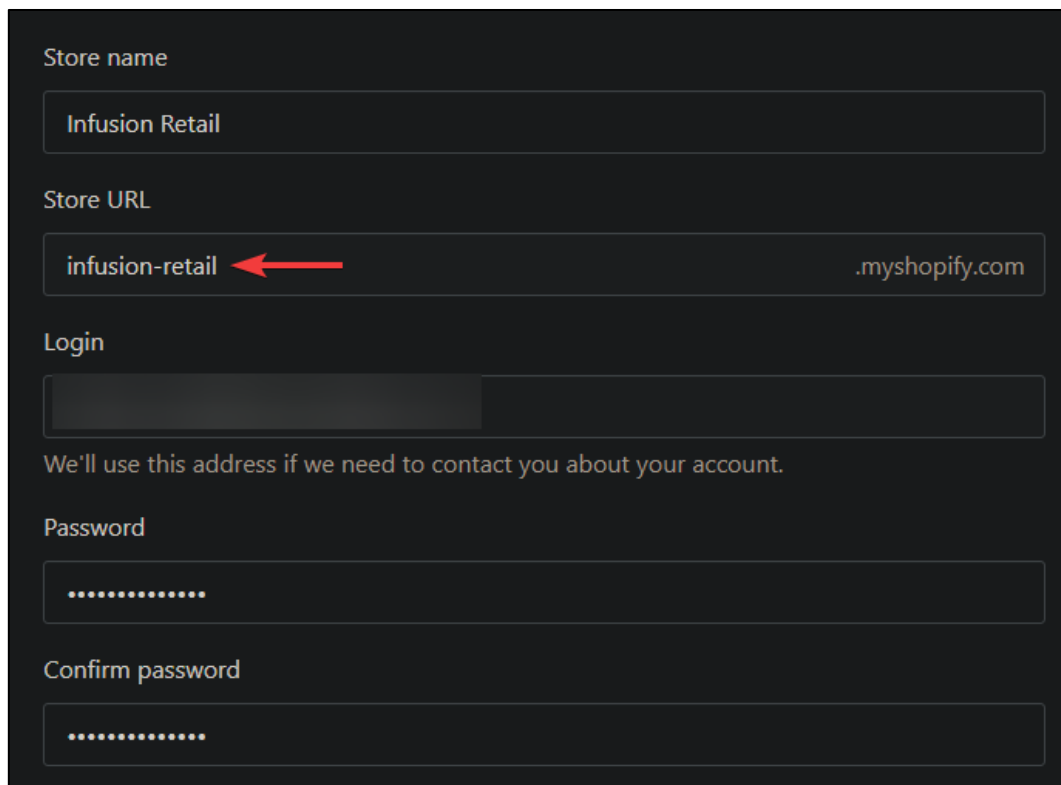
1. **Sync Database** – The directory for the Shopify sync database. Once you select your Infusion folder in the previous step, it will select a default directory for the database.
2. **Account Name** – Its best to create a generic customer account in Infusion used for web sales and leave the address blank. The sync tool will populate the address fields with the delivery/billing address provided by the customer when they placed their order. Enter the name of that account in this field.
3. **Account No.** – The account number for the Shopify web sales customer account from Infusion.
4. **Store URL** – This is usually your store name followed by “.myshopify.com”. Retrieve this by following the steps in the [Retrieving Your Store URL](#) section below.
5. **Token** – This is your authorization token that authorizes the sync tool to upload to your store. Retrieve this by following the steps in the [Retrieving Your Store Token](#) section below.
6. **Portal** – Once you’ve entered your store URL, this will take you to your Shopify Admin Portal.

NOTE: You may change the location of your **Sync Database** file but it’s extremely important you use the same file. The tool uses this file to determine which products already exist on Shopify. If the sync tool cannot find your database file, it will prompt you to create a new one, which will cause your products to be duplicated on Shopify and you’ll have to delete all your products on Shopify and re-sync everything. For simplicity, it’s recommended to leave it in its default location.

Retrieving Your Store URL

Your store URL can be found either:

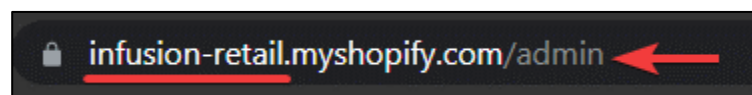
1. During store creation



The screenshot shows a dark-themed form for creating a Shopify store. It includes the following fields and text:

- Store name:** A text input field containing "Infusion Retail".
- Store URL:** A text input field containing "infusion-retail" followed by ".myshopify.com". A red arrow points to the "infusion-retail" portion of the URL.
- Login:** A text input field that is currently empty.
- Text:** Below the login field, it says "We'll use this address if we need to contact you about your account."
- Password:** A text input field with masked characters (dots).
- Confirm password:** A text input field with masked characters (dots).

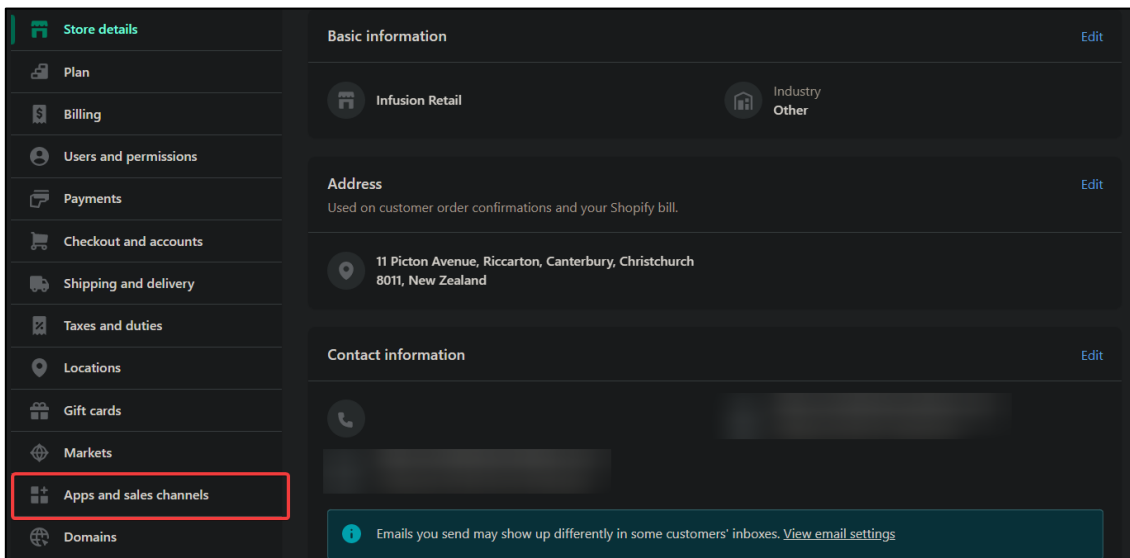
2. In the URL of your Shopify Admin Portal or your store. You only need the section before the ".myshopify.com".



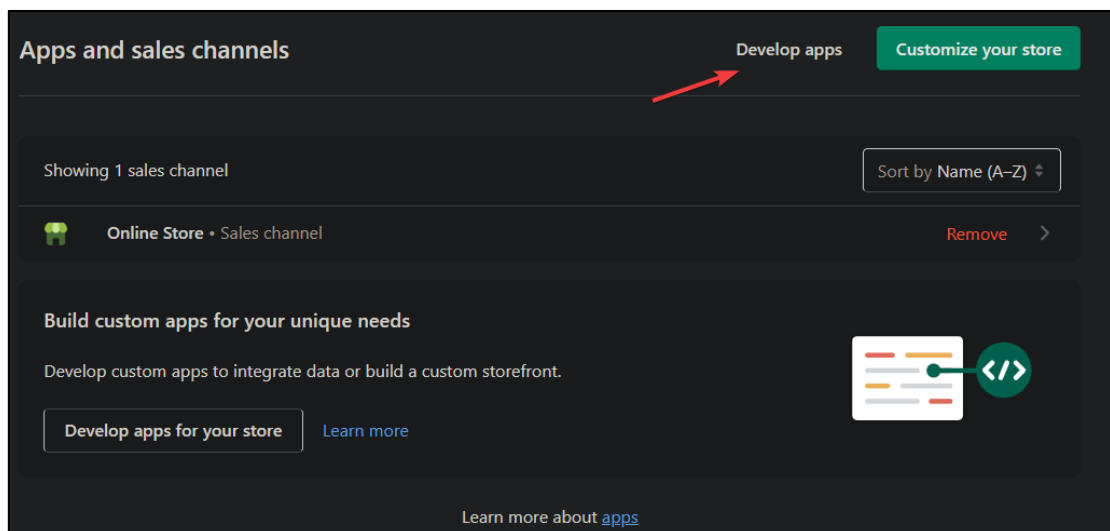
Retrieving Your Store Token

You'll need to register and create an app on your store which the sync tool will connect to through the pasted store token, granting it access to your store.

1. Navigate to Shopify Admin portal and click "Settings" in the bottom left corner
2. Click "Apps and sales channels"

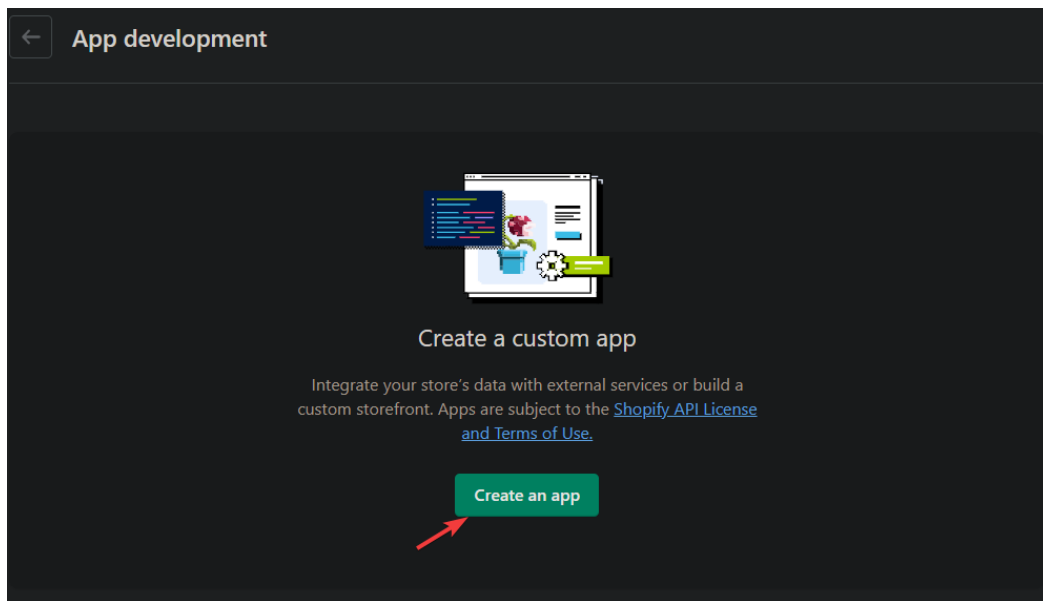


3. Click "Develop apps" in the top right corner

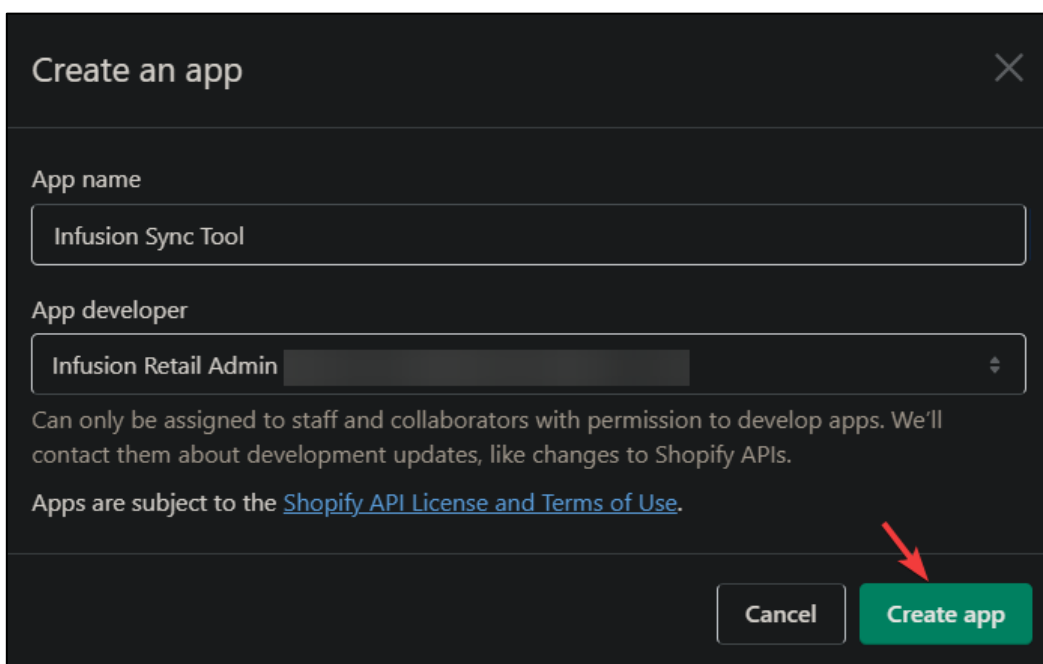


4. Click "Allow custom app development"
5. Click "Allow custom app development" again to confirm

6. After confirming, you should see “Create an app”. Click the button.



7. You will see the “Create an app” pop-up screen.
 - a. Enter a name so you can easily identify the app on your store – Infusion Sync Tool is recommended
 - b. Make sure “App developer” is your store name with your store email address
8. Click “Create app”



9. You will be presented with a configuration screen for your newly created app. Click “Configure Admin API scopes”

App development > Infusion Sync Tool

Overview Configuration API credentials App settings

Select your access scopes to get started

Retrieve and sync store data with the Admin API. Develop unique shopping experiences with Storefront API.

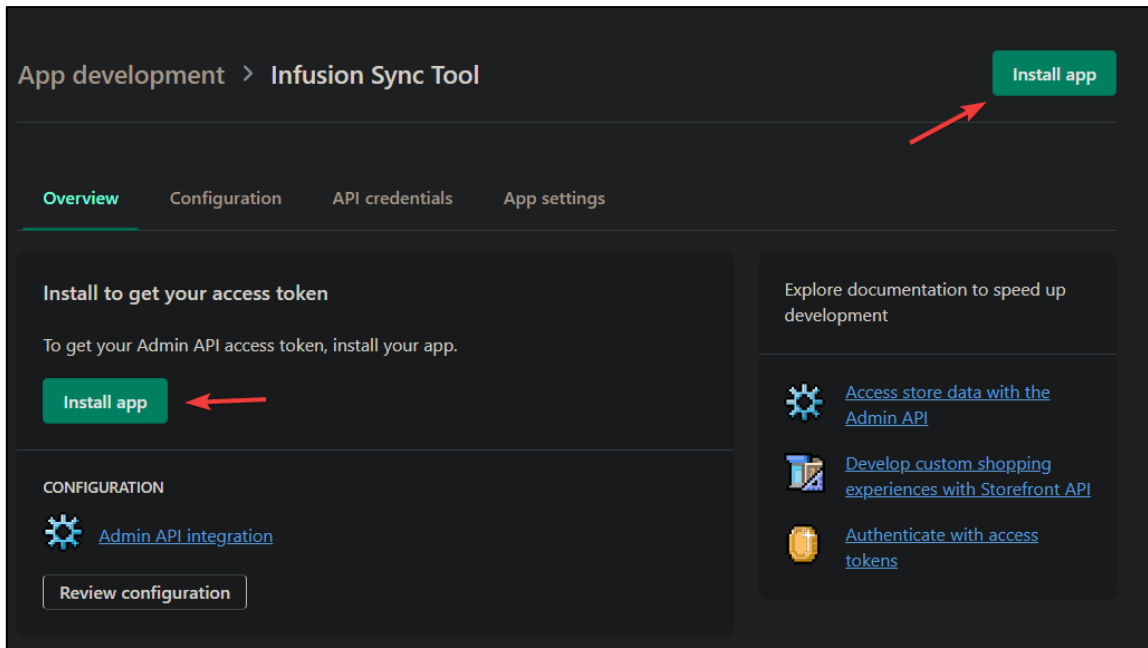
Configure Admin API scopes Configure Storefront API scopes

Development history

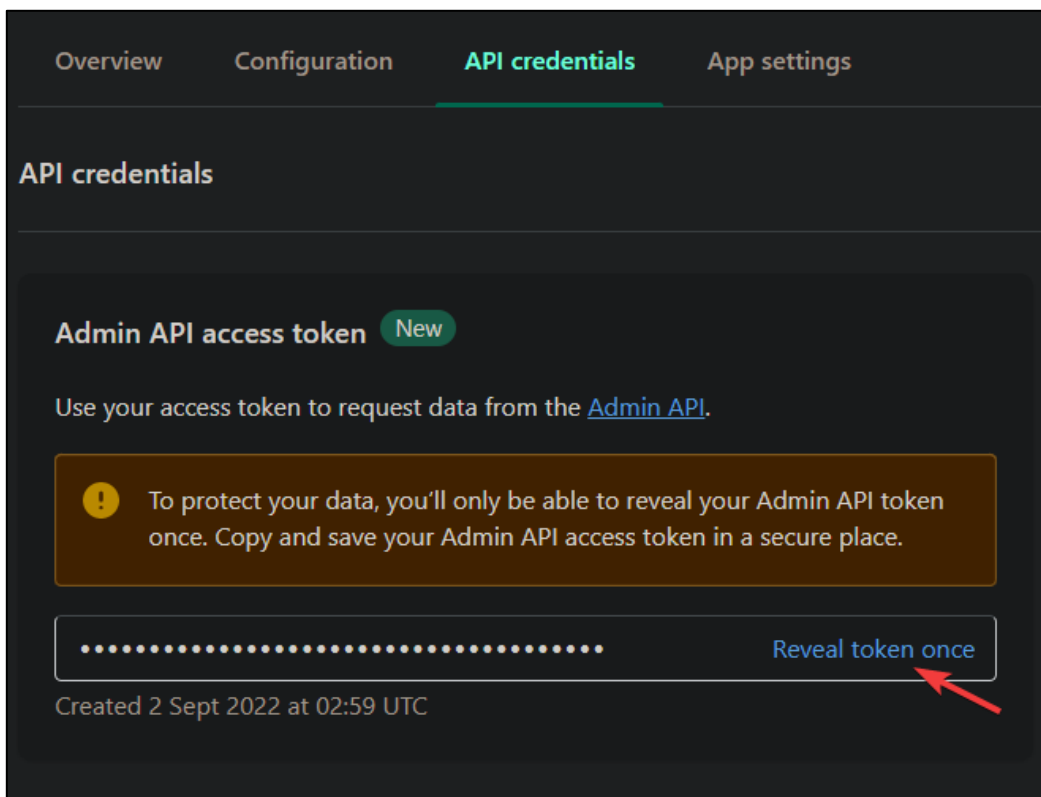
All times in UTC.

Event	User	Date
App created		2 Sept 2022 at 02:31

10. You need to grant specific scopes for give the sync tool access to different functions on your store. Granting the write scope will also grant the read scope. You’ll need to grant the following (can be pasted into the search box):
 - a. read_inventory
 - b. write_inventory
 - c. read_products
 - d. write_products
 - e. read_files
 - f. write_files
 - g. read_product_listings
 - h. write_product_listings
 - i. read_orders
 - j. write_orders
11. Click “Save”
12. Click “Install app”, either in the overview or in the top right corner



13. Click “Install” in the pop-up
14. You’ll be taken to the “API credentials” section of the app settings and you’ll see your hidden token.
15. You can only reveal your token **once** and it’s highly recommended you store this somewhere safe. This is also the token you need to paste into the sync tool. Once you’re ready to enter your token, click “Reveal token once”.



16. Once revealed, copy, and paste it into the “Token” field in the sync tool and somewhere safe where you can easily retrieve it again in case you need to reinstall the sync tool.

Once you've populated your Shopify settings, they should look something like below. Verify your settings and click "Save".

Shopify Settings

Sync Database	<input type="text" value="C:\Infusion\shopifysynctool.db"/>	<input type="button" value="Browse"/>	
Account Name	<input type="text" value="Shopify Sales"/>	Account No.	<input type="text" value="1078"/>
Store URL	<input type="text" value="infusion-retail"/>	Token	<input type="text" value="....."/> <input type="button" value="Portal"/>

Home Screen

Once you've clicked "Save", the main home screen will appear. This might take a few seconds depending on how many products you have in Infusion Accounting Software.

The screenshot shows the 'E-Commerce Sync Tool' interface. At the top left is the 'infusion Accounting Software' logo. The title 'E-Commerce Sync Tool' is centered at the top. Below the title are 'Help' and 'Settings' buttons. A table lists products with columns for Product Code, Description, Cost Price, Sell Price, Qty, Type, and Barcode. Below the table is a 'Sync Status' section with 'Clear Log' and 'Open Log' buttons. At the bottom are 'Close' and 'Sync' buttons. A log window shows the following text:

```
Fetches 6350 products
Shopify sync database found - connecting...
Connected!
Checking Shopify products' sync state...
New Products: 6350
Outdated Products: 0
```

You can see in the bottom centre of the screen how many products are new (aren't already uploaded to Shopify) and how many are outdated (uploaded to Shopify but have since had changes through Infusion Accounting Software).

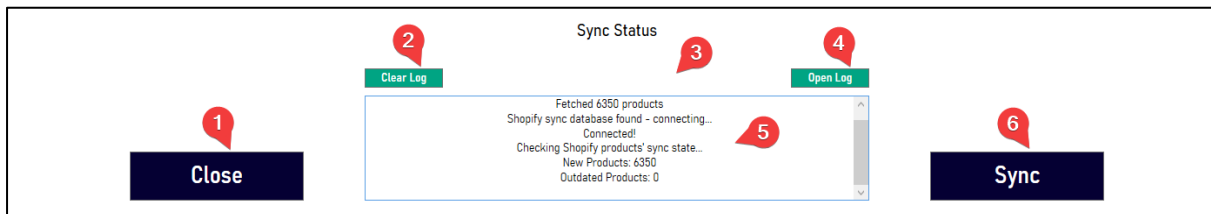
Below is a break down of the home screen interface.

The screenshot shows the 'E-Commerce Sync Tool' interface with three numbered callouts: 1. Zoom Controls (pointing to the minus and plus buttons), 2. Help (pointing to the Help button), and 3. Settings (pointing to the Settings button).

1. **Zoom Controls** – The zoom buttons will zoom the data grid in or out to view the products easier.
2. **Help** – This button will open the documentation for the sync tool in your default PDF reader.
3. **Settings** – This button will open the settings screen to further configure or adjust the sync tool settings.

Product Code	Description	Cost Price	Sell Price	Qty	Type	Barcode
DISC11221038	Marillion - Misplaced Childhood	\$35.00	\$50.00	127		190295825515
DISC9829622	USA For Africa - We Are The World	\$0.00	\$0.00	1		PAL400431AFD61BII
DISC21705979	Fragments - Bonobo	\$0.00	\$0.00	1		5054429152951
DISC21824260	Bonobo - Fragments	\$0.00	\$0.00	0		5054429152944
DISC21933541	Black Country, New Road - Anis From Up There	\$0.00	\$0.00	5		5054429153033
DISC2785042	The KLF - 3 A.M. Eternal (Pure Trance 2)	\$0.00	\$0.00	0		5017139250058
DISC192771	Z-Factor - I Am The D.J. Remix Of The Remix	\$0.00	\$0.00	0		PRL8537
DISC2901203	Pink Floyd - The Piper At The Gates Of Dawn	\$0.00	\$0.00	0		XAX3419
DISC6251072	Motörhead - Motörhead	\$0.00	\$0.00	1		AWIK2A12
DISC22161283	Beach House - Once Twice Melody	\$0.00	\$0.00	0		098787147018
DISC22192822	Lee Morgan - 'Caramba'	\$0.00	\$0.00	0		602438761852

This displays all the products that the sync tool has read from Infusion Accounting Software. You can see at a brief glance what products will be uploaded. Only products that have “Exclude from Website” unticked will be uploaded to the E-Commerce platforms.



1. **Close** – Closes the sync tool.
2. **Clear Log** – Clears the status log in the bottom centre of the screen.
3. **Sync Status** – Once you initiate syncing, a progress bar and the current product being synced will be displayed here. It is hidden until you begin syncing.
4. **Open Log** – This will open a more detailed log stored in the Infusion folder. If you are getting errors, need to troubleshoot or provide Infusion Support with logs, you can access them here.
5. **Status Log** – This log will display what the sync tool is doing and other relevant information during the sync process. If something unexpected occurs, or a process was unable to be completed, it will notify you here, as well as write a detailed log of events to the sync tool logs.
6. **Sync** – Begins the syncing process. Once you start syncing, you cannot pause it; only close the sync tool. It's recommended to try avoid closing the sync tool during a sync to prevent duplication or mismatch issues occurring, however the tool has been designed to attempt to avoid these on its own. Pausing and stopping a sync in progress will be coming in a later update.

Settings

After completing the first-time setup, there will be a few other configurations you will need to set up, both in the tool and on your E-Commerce platforms. Upon entering the settings screen by clicking the top right “Settings” button, you’ll notice a couple of extra options are available.

General Settings

Storefronts Shopify WooCommerce

Image Sync Mode No Images Missing Images All Images

Infusion

Vendor Name

1

Shopify Settings

Sync Database

Account Name Account No.

Store URL Token

Fulfillment Location Display Stock All Locations Fulfillment

WooCommerce Settings

Sync Database

Account Name Account No.

Store URL Token

1. **Web Field Mapping** – This screen will let you configure what custom tags and categories your products will display on your E-Commerce platform. You can read more about how to configure this in the [Web Field Mapping](#) section.
2. **Fulfillment Location** – Choose a location from this drop-down that will act as your “depot” for web sales. Infusion invoices will be created against this location.
3. **All Locations** – This option will display product stock from all your Infusion locations
4. **Fulfillment** – This option will display product stock from your chosen fulfilment location in Step 2.

Web Field Mapping

Upon entering the web field mapping screen, you should see some text boxes with labels and checkboxes beside them.

Web Fields

Storefront Field Name <small>(leave blank to use current field name)</small>	Storefront Field Name <small>(leave blank to use current field name)</small>
Tag 1 <input type="text"/> <input type="checkbox"/> Sync	Tag 9 <input type="text"/> <input type="checkbox"/> Sync
Tag 2 <input type="text"/> <input type="checkbox"/> Sync	Tag 10 <input type="text"/> <input type="checkbox"/> Sync
Tag 3 <input type="text"/> <input type="checkbox"/> Sync	Tag 11 <input type="text"/> <input type="checkbox"/> Sync
Tag 4 <input type="text"/> <input type="checkbox"/> Sync	Tag 12 <input type="text"/> <input type="checkbox"/> Sync
Tag 5 <input type="text"/> <input type="checkbox"/> Sync	Tag 13 <input type="text"/> <input type="checkbox"/> Sync
Tag 6 <input type="text"/> <input type="checkbox"/> Sync	Tag 14 <input type="text"/> <input type="checkbox"/> Sync
Tag 7 <input type="text"/> <input type="checkbox"/> Sync	Tag 15 <input type="text"/> <input type="checkbox"/> Sync
Tag 8 <input type="text"/> <input type="checkbox"/> Sync	Tag 16 <input type="text"/> <input type="checkbox"/> Sync
Category 1 <input type="text"/> <input type="checkbox"/> Sync	
Category 2 <input type="text"/> <input type="checkbox"/> Sync	
Category 3 <input type="text"/> <input type="checkbox"/> Sync	
Category 4 <input type="text"/> <input type="checkbox"/> Sync	
Category 5 <input type="text"/> <input type="checkbox"/> Sync	

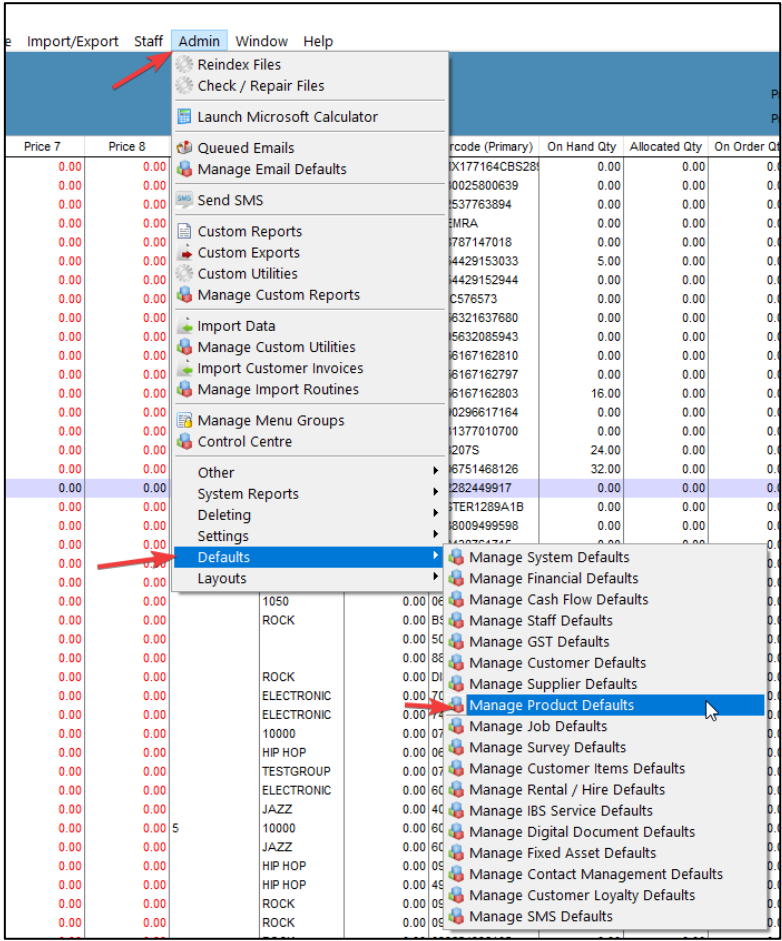
CloseSave

This screen will be used to provide custom dynamic information for your products, in addition to the type, group etc. For example, if you were selling records, you may want to provide the country where the record was released, the year it was released, the genre and the RPM of the physical vinyl. These tags can be toggled on or off and if toggled on, the sync tool will sync that web field for all products.

For example, if you toggled sync on for Tag 1, Tag 2 but not Tag 3, all products would have their respective values for Tag 1 and 2 uploaded but wouldn't have anything uploaded for Tag 3. If you were to then toggle Tag 1 off, new products would no longer have their Tag 1 values uploaded and existing products wouldn't have their Tag 1 values updated. To update products' Tag 1, you would have to toggle Tag 1 on again.

Storefront Field Name		Storefront Field Name	
(leave blank to use current field name)		(leave blank to use current field name)	
Tag 1	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 2	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 3	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 4	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 5	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 6	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 7	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 8	<input type="text"/>	<input type="checkbox"/> Sync	
Category 1	<input type="text"/>	<input type="checkbox"/> Sync	
Category 2	<input type="text"/>	<input type="checkbox"/> Sync	
Category 3	<input type="text"/>	<input type="checkbox"/> Sync	
Category 4	<input type="text"/>	<input type="checkbox"/> Sync	
Category 5	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 9	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 10	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 11	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 12	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 13	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 14	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 15	<input type="text"/>	<input type="checkbox"/> Sync	
Tag 16	<input type="text"/>	<input type="checkbox"/> Sync	

The highlighted labels are read directly from the product default fields in Infusion. You can manage your product defaults by navigating to the “Manage Product Defaults” menu in Infusion.



Storefront Field Name		
(leave blank to use current field name)		
CustomTag1	<input type="text"/>	<input checked="" type="checkbox"/> Sync
CustomTag2	<input type="text"/>	<input checked="" type="checkbox"/> Sync
Tag 3	<input type="text"/>	<input type="checkbox"/> Sync
Tag 4	<input type="text"/>	<input type="checkbox"/> Sync
Tag 5	<input type="text"/>	<input type="checkbox"/> Sync
Tag 6	<input type="text"/>	<input type="checkbox"/> Sync
CustomTag7	<input type="text"/>	<input type="checkbox"/> Sync
Tag 8	<input type="text"/>	<input type="checkbox"/> Sync

CustomTag2	TagValue2
CustomTag1	TagValue1

For example, in the above image, web tags on Shopify will display as “CustomTag 1: TagValue1”. However, if you typed “Country” in the custom field name beside Tag 1 as below, the tag would display “Country: TagValue1” instead.

Storefront Field Name		
(leave blank to use current field name)		
CustomTag1	<input type="text" value="Country"/>	<input checked="" type="checkbox"/> Sync
CustomTag2	<input type="text"/>	<input checked="" type="checkbox"/> Sync
Tag 3	<input type="text"/>	<input type="checkbox"/> Sync
Tag 4	<input type="text"/>	<input type="checkbox"/> Sync
Tag 5	<input type="text"/>	<input type="checkbox"/> Sync
Tag 6	<input type="text"/>	<input type="checkbox"/> Sync
CustomTag7	<input type="text"/>	<input type="checkbox"/> Sync
Tag 8	<input type="text"/>	<input type="checkbox"/> Sync

Country	TagValue1
---------	-----------

For Shopify users, the web tags aren’t publicly displayed on your store web page until you edit your store theme and set them up, which means you can define how you wish a customer to see these tags (i.e., “Country: New Zealand” or “Place of Origin: New Zealand”).

The above field names are used within the Shopify Admin and helps you identify what each tag is mapped to and provides a more customizable way to manage your products and product metadata. You can learn more about how you display these web tags in the [Displaying Metafields and Collections](#) section below.

Shopify Web Mappings

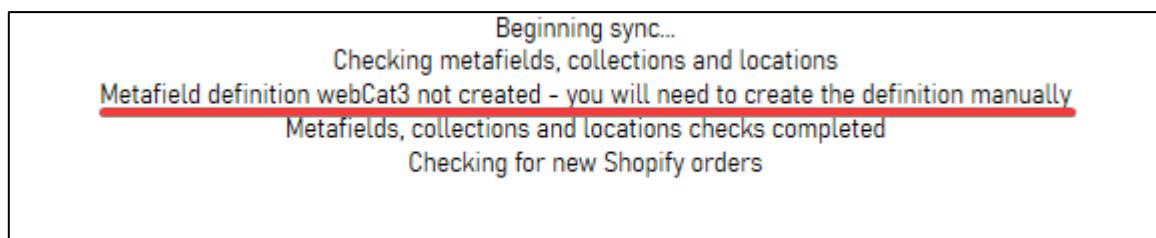
For Shopify, web tags will be written to custom fields called Metafields. The web categories will be written to groups called Collections.

Metafields

On Shopify, products can have custom fields called Metafields. A product metafield will provide supporting dynamic information to customers. These are what the sync tool will write the web tags to. A metafield will have a metafield definition. A definition defines the name and what type of information, such as numbers, text, or dates, that a metafield will have. Metafield definitions are defined for an entire store and each product has its own value for its metafields. The sync tool will automatically create a metafield definition for each web tag that has been toggled to sync and then subsequently upload the respective product web values to the product metafield.

It's extremely important that you **do not** modify Shopify metafields after they've been created through the sync tool. If you wish to disable or are no longer using a web field for your product/s, or you wish to change the displayed name of a metafield, toggle it off or rename the field using the sync tool web field mappings screen as above.

If you alter metafields through the Shopify Admin settings screen, you will be unable to sync web fields to the metafields for your products correctly. This is because of how Shopify handles metafields and will return an error if a product already contains values for a metafield that was previously deleted or renamed and will require you to delete the product/s containing that value before you can continue syncing properly.



If you receive this message in your sync state log during the beginning of a sync, it means a product contains an undefined metafield. This usually happens when a metafield definition was deleted, edited, or created through the Shopify Admin portal instead of the sync tool settings, and a product still contains a value for that metafield. You can usually fix this by following the [Troubleshooting Undefined Metafields](#) section. If the error persists, you should contact Infusion Support.

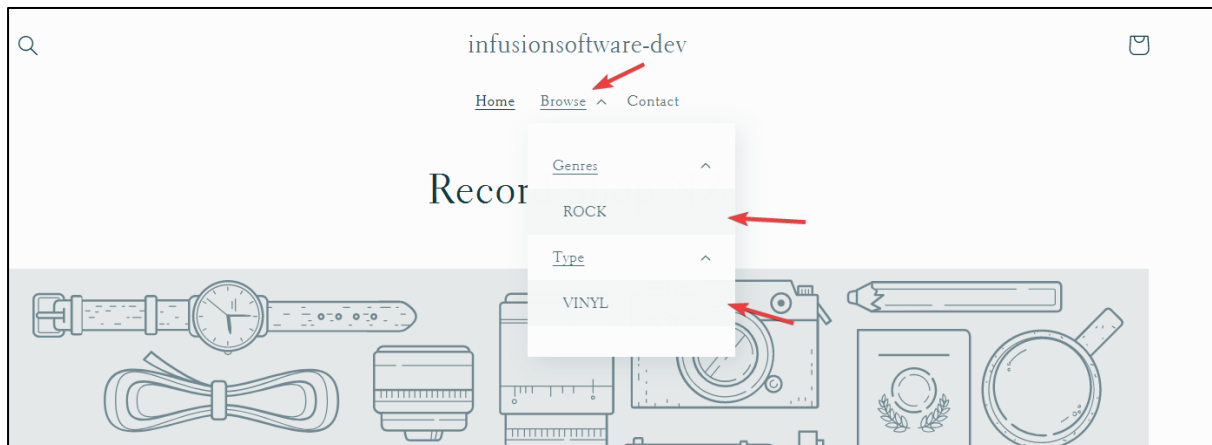
Collections

Collections on Shopify are groups/types or labels by which to categorize your products. Collections will be created based on the values your products have in their web categories.

Format	<input type="text"/>	<input checked="" type="checkbox"/> Sync
Genre	<input type="text"/>	<input checked="" type="checkbox"/> Sync
Sub-Genre	<input type="text"/>	<input checked="" type="checkbox"/> Sync
Cat4	<input type="text"/>	<input type="checkbox"/> Sync
Cat5	<input type="text"/>	<input type="checkbox"/> Sync

Web Categories	
Format	VINYL <input type="button" value="v"/>
Genre	ROCK <input type="button" value="v"/>
Sub-Genre	Soft Rock <input type="button" value="v"/>

The configuration above will create three collections; “VINYL”, “ROCK” and “Soft Rock” and the product will be added to those collections, as well as any subsequent products in the same categories. Customers can then use these collections to filter products they’re looking for, by browsing for products categorized as “ROCK” or browse all of the “VINYL” products.



Web categories from Infusion are also created as metafields on Shopify. This is to allow you to list category values on your individual product pages, such as displaying what type or genre a product is. In a similar way to the web tags, you can choose what names you wish to display for your metafields, and the sync tool will automatically create them and add them to your products.



It's worth noting that using custom field names for web categories won't affect the name of your collections, just the name of the relevant product metafield.

Displaying Metafields and Collections

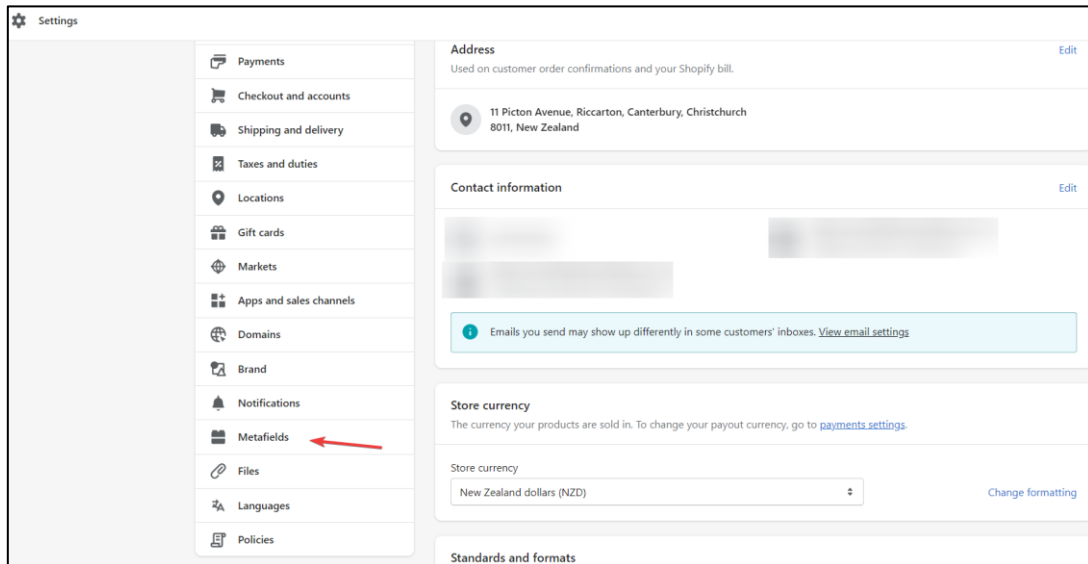
Stores use themes, be it default or a customized one. These themes define the overall appearance and visual experience customers have using your store. For some themes, metafields and collections may not be displayed by default or the way that would best suit your customers and type of store. Shopify theme customization is out of scope of this documentation and the sync tool cannot edit themes, but you can click the following two links to learn more about displaying your metafields and collections.

- [Displaying Metafields](#)
- [Displaying Collections](#)

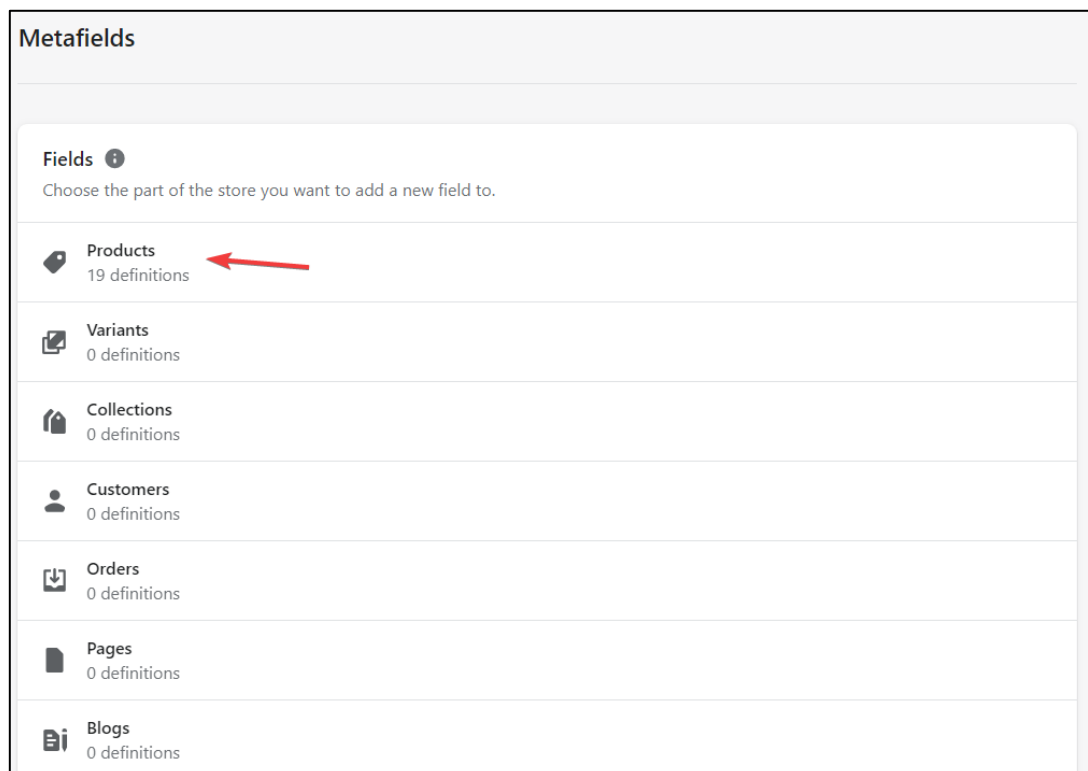
Troubleshooting Undefined Metafields

This process will require creating a metafield definition in the Shopify Admin portal. The definition will need to be entered correctly otherwise it won't sync properly. Follow the steps below to begin.

1. Navigate to your settings and click "Metafields"



2. Click "Products"



3. Here you will see all your metafield definitions for your products, and how many products these definitions are used in. You will also notice a tab called "Metafields without a definition" – click this tab.

Product metafield definitions Add definition

Definitions Metafields without a definition

Definition name	Content type	Used in
Country product.metafields.product_fields.tag1	A Single line text	16 products
Format product.metafields.product_fields.webCat1	A Single line text	16 products
Genre product.metafields.product_fields.webCat2	A Single line text	16 products
CustomTag2 product.metafields.product_fields.tag2	A Single line text	16 products
TagFieldd12 product.metafields.product_fields.tag12	A Single line text	0 products
TagFieldd15 product.metafields.product_fields.tag15	A Single line text	0 products
TagFieldd16 product.metafields.product_fields.tag16	A Single line text	0 products
TagFieldd13 product.metafields.product_fields.tag13	A Single line text	0 products

4. Here are all metafields that have values but have no definition. For example, Infusion’s web category 3 represents “Sub-Genre” for our products. This is telling us we have 16 products with a value for “Sub-Genre” but no definition. Without the definition, the sync tool is unable to manage the metafields correctly and won’t update them accordingly. Click “Add definition”.

Definitions Metafields without a definition

Namespace and key	Used in
<u>product_fields.webCat3</u>	<u>16 products</u> Add definition

5. You can find the name for this metafield in your Web Field Mapping screen in the sync tool. Enter it exactly as it’s displayed in the text box. Then click “Select content type”.

Category 1	<input type="text" value="Format"/>	<input checked="" type="checkbox"/> Sync
Category 2	<input type="text" value="Genre"/>	<input checked="" type="checkbox"/> Sync
Category 3	<input type="text" value="Sub-Genre"/>	<input checked="" type="checkbox"/> Sync
Category 4	<input type="text" value="Cat4"/>	<input type="checkbox"/> Sync
Category 5	<input type="text" value="Cat5"/>	<input type="checkbox"/> Sync

← Add product definition for 16 metafields 📌 Definition pinned

Sample metafield for product_fields.webCat3 [View more](#)

Christian Rock

Name ↖

Namespace and key
product_fields.webCat3
The system uses this to identify the definition.

Description 0/100

Expose this metafield to Storefront API requests. [Learn more](#)
Give read access to apps, storefronts, or anything using the Storefront API.

+ Select content type ↖

6. Select “Single line text”

← Add product definition for 16 metafields 📌 Definition pinned

MOST USED

- A Single line text ←
- A Multi-line text
- # Integer
- # Decimal
- ↔ Product
- ↔ File

DATE AND TIME

- 📅 Date
- 📅 Date and time

MEASUREMENT

- ↑↓ Weight

+ Select content type

7. Click “Save”.

8. Click “Save definition”.

This newly created metafield definition should sync during the next sync and the error message should no longer be displayed.

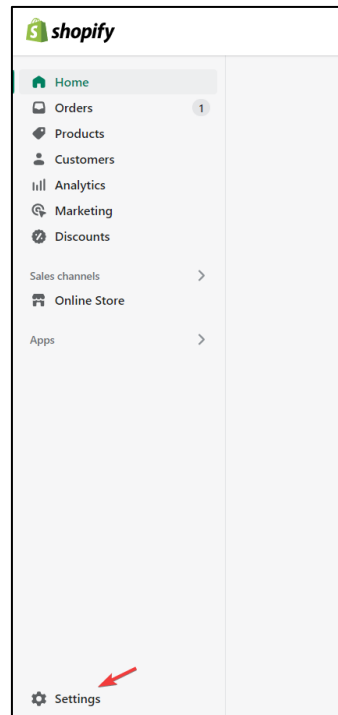
Locations

Infusion Accounting Software uses locations to determine where stock of a product may be. The sync tool takes that into account when uploading products.

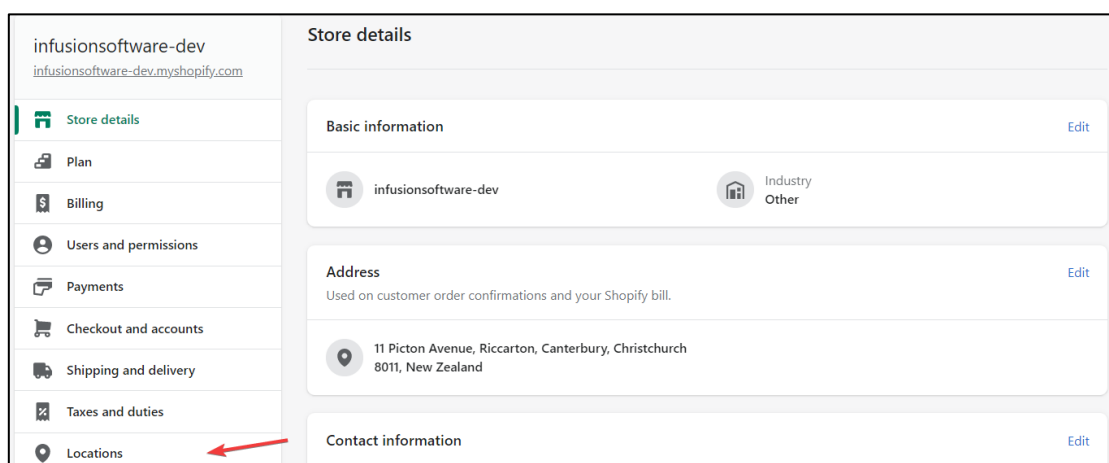
Shopify Locations

Locations unfortunately cannot be created automatically on Shopify. You will need to do this manually to sync your products properly.

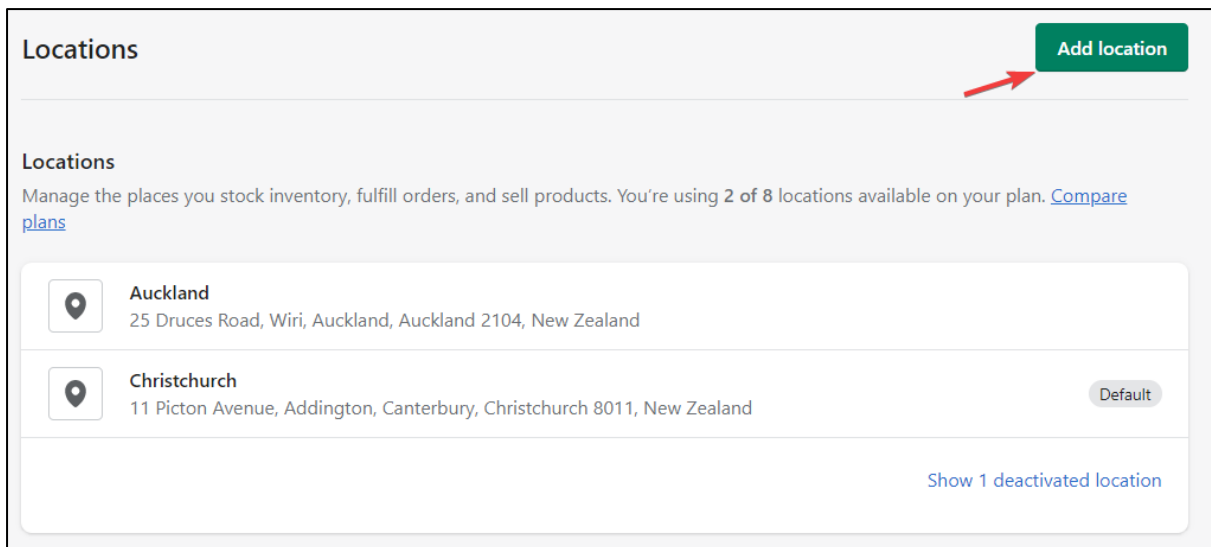
1. Navigate to your Shopify Admin portal. You can do this by using the “Portal” button in the sync tool settings or going to [yourshopname].myshopify.com/admin.



2. Click Locations



3. Click “Add Location”



4. The location name **must** match exactly as it is in the Infusion Software. Fill out your address details – you can edit the address later if you wish. Click “Save” when you’re finished.

The sync tool will now correctly upload stock levels at your locations. Stock will need to be added to a product for it to be displayed at the location. More specifically, if a product has never had any stock allocated at “Auckland”, it won’t be displayed as “0 in stock” but rather not be displayed at all. Once a product has had stock allocated at least once, it will correctly display zero stock where applicable.

You’re now ready to begin syncing!

Beginning Sync

When you click “Sync”, a couple of new elements will appear, and you’ll notice your log will be printing information. As previously mentioned, “Exclude from Website” in Infusion must be unticked on a product to upload it to the E-Commerce platforms.

Product Code	Description	Cost Price	Sell Price	Qty	Type	Barcode
DISC11221038	Marillion - Misplaced Childhood	\$35.00	\$50.00	127		190295825515
DISC9829622	USA For Africa - We Are The World	\$0.00	\$0.00	1		PAL400431AFD61BII
DISC21705979	Fragments - Bonobo	\$0.00	\$0.00	1		5054429152951
DISC21824260	Bonobo - Fragments	\$0.00	\$0.00	0		5054429152944
DISC21933541	Black Country, New Road - Ants From Up There	\$0.00	\$0.00	5		5054429153033
DISC2785042	The KLF - 3 A.M. Eternal (Pure Trance 2)	\$0.00	\$0.00	0		5017139250058
DISC192771	Z-Factor - I Am The D.J. Remix Of The Remix	\$0.00	\$0.00	0		PRL8537
DISC2901203	Pink Floyd - The Piper At The Gates Of Dawn	\$0.00	\$0.00	0		XAX3419
DISC4251072	Motörhead - Motörhead	\$0.00	\$0.00	1		AWIK2A12
DISC22161283	Beach House - Once Twice Melody	\$0.00	\$0.00	0		098787147018
DISC22192822	Lee Moran - ¡Caramba!	\$0.00	\$0.00	0		602438761852

1. **Current Product** – This label will display which product is currently being synced. It also shows the number of the current order being synced.
2. **Progress Bar** – Displays the current sync progress.

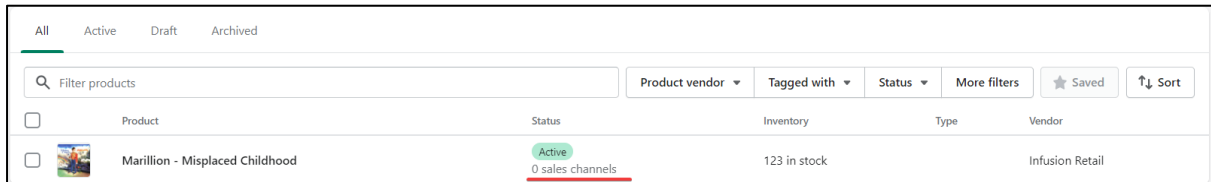
The sync log will display what each product is doing and the various states of the syncing process.


It’s important to note that all products must be uploaded through the sync tool, and you shouldn’t modify or edit any uploaded products on the E-Commerce platforms. The sync tool uses an intermediary database to tell when a product needs to be updated and utilizes IDs returned by

Shopify. Products manually uploaded will not be interpreted correctly by the sync tool and you will end up with duplicates on your E-Commerce platforms.

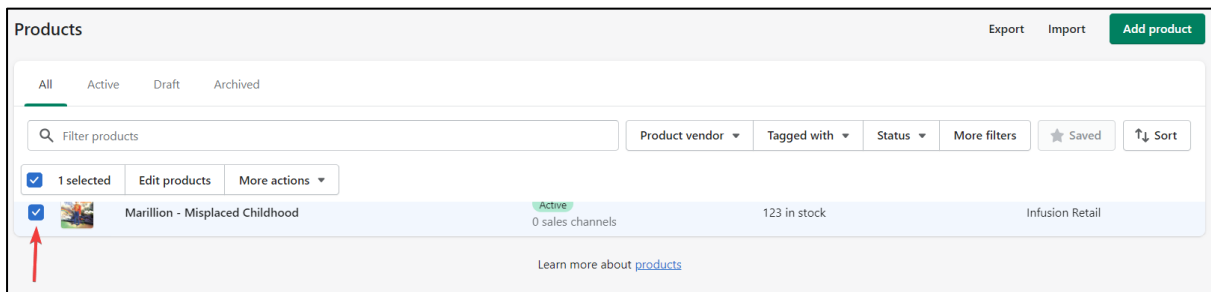
Publishing Your Products


Shopify uses 'channels' to define where products will be available to your customers. For example, you could use a sales channel for your POS systems and a channel for your online store. Initially, products aren't live on your store because they haven't been added to a channel yet.



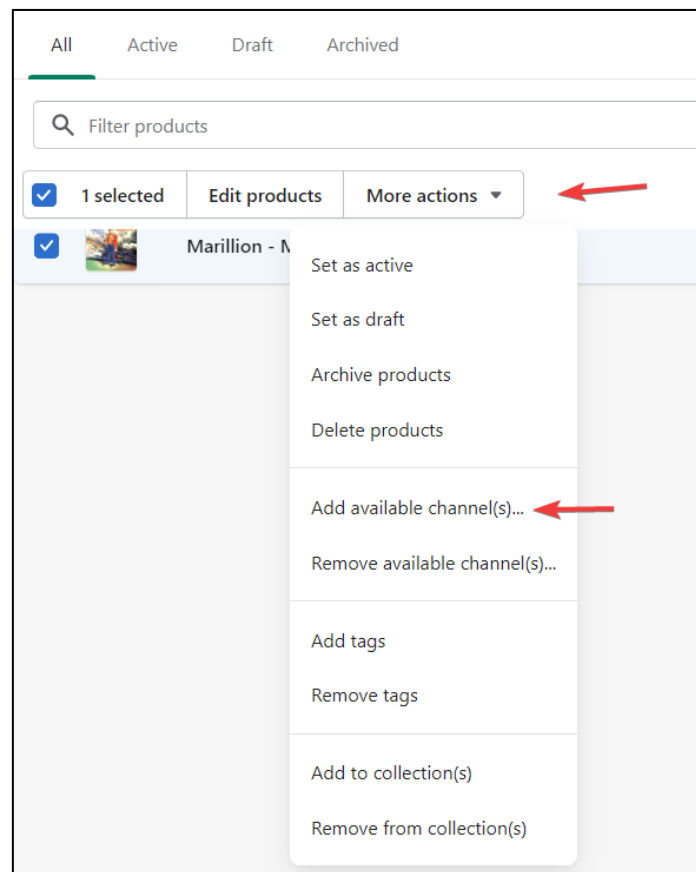
	Product	Status	Inventory	Type	Vendor
<input type="checkbox"/>	 Marillion - Misplaced Childhood	Active 0 sales channels	123 in stock		Infusion Retail


Products will need to be added to the 'Online Store' channel. To add a product to an available channel, you select the product:



	Product	Status	Inventory	Type	Vendor
<input checked="" type="checkbox"/>	 Marillion - Misplaced Childhood	Active 0 sales channels	123 in stock		Infusion Retail

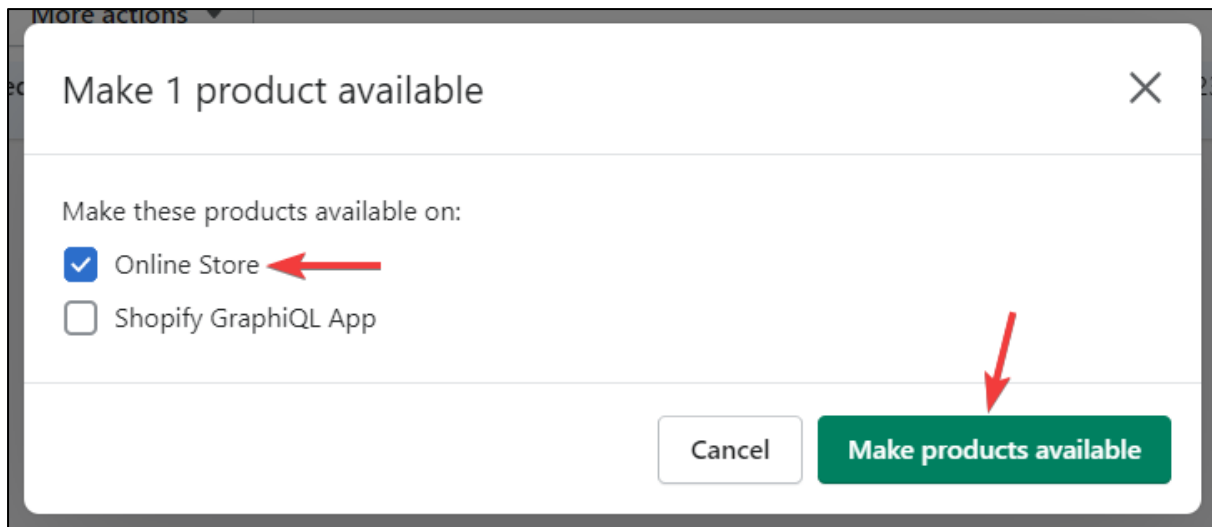
Click "More actions" and then "Add available channel(s)...".



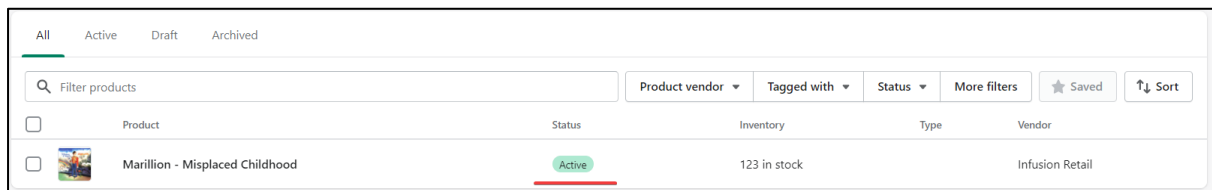
	Product	Status	Inventory	Type	Vendor
<input checked="" type="checkbox"/>	 Marillion - M	Active			

- Set as active
- Set as draft
- Archive products
- Delete products
- Add available channel(s)...
- Remove available channel(s)...
- Add tags
- Remove tags
- Add to collection(s)
- Remove from collection(s)

Make sure “Online Store” is checked and then click “Make products available”.



Don't worry if “Shopify GraphiQL App” isn't an option available to you – this is purely a testing channel. Once your product is on the “Online Store” channel, it will be live and available to purchase by your customers.



Orders and Invoices

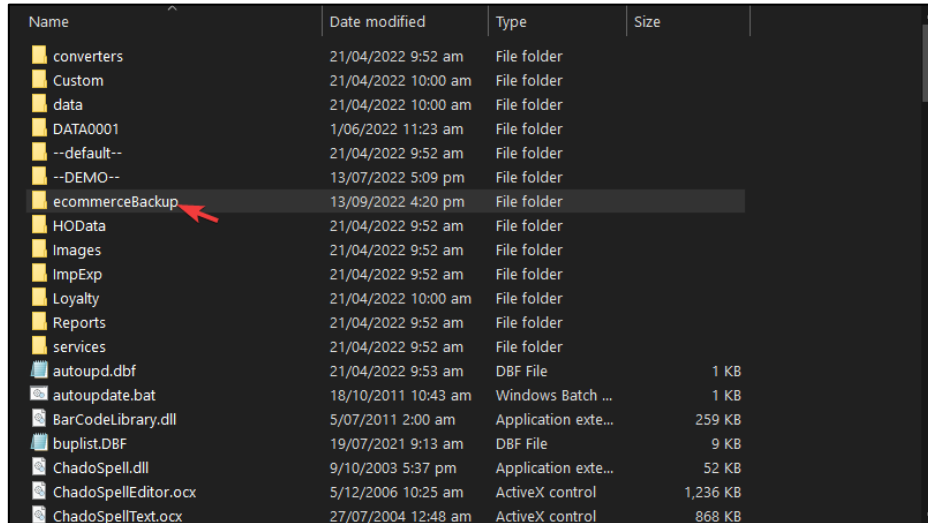
The sync tool will create Infusion invoices from orders placed on the E-Commerce platforms. These invoices will be invoiced to the fulfilment location you selected earlier. Once an invoice has been posted in Infusion, the sync tool will complete the order on the E-Commerce platforms. Similarly, if an invoice is deleted, in the event an order is cancelled or refunded, the sync tool will automatically close or delete the order.

Shopify Orders

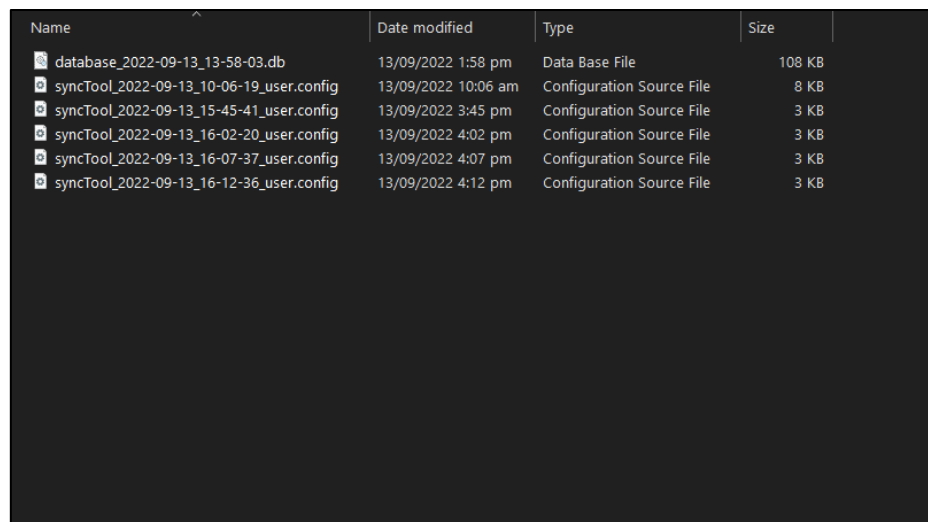
To properly complete an order on Shopify, it needs to be fulfilled. Currently, the sync tool will close an order when the relevant invoice has been posted, instead of fulfilling it. Fulfilling Shopify orders is still a work in progress and will be available soon. In the interim, you can manually fulfil the orders if you wish – this won't have any effect on the syncing process.

Backups

Each time a sync is completed, the sync tool will make a backup copy of your sync database. Similarly, it will back up your settings configuration each time you save your settings. These backups can be found in a folder called "ecommerceBackup" inside your Infusion folder.



Name	Date modified	Type	Size
converters	21/04/2022 9:52 am	File folder	
Custom	21/04/2022 10:00 am	File folder	
data	21/04/2022 10:00 am	File folder	
DATA0001	1/06/2022 11:23 am	File folder	
--default--	21/04/2022 9:52 am	File folder	
--DEMO--	13/07/2022 5:09 pm	File folder	
ecommerceBackup	13/09/2022 4:20 pm	File folder	
HOData	21/04/2022 9:52 am	File folder	
Images	21/04/2022 9:52 am	File folder	
ImpExp	21/04/2022 9:52 am	File folder	
Loyalty	21/04/2022 10:00 am	File folder	
Reports	21/04/2022 9:52 am	File folder	
services	21/04/2022 9:52 am	File folder	
autoupd.dbf	21/04/2022 9:53 am	DBF File	1 KB
autoupdate.bat	18/10/2011 10:43 am	Windows Batch ...	1 KB
BarCodeLibrary.dll	5/07/2011 2:00 am	Application exte...	259 KB
buplist.DBF	19/07/2021 9:13 am	DBF File	9 KB
ChadoSpell.dll	9/10/2003 5:37 pm	Application exte...	52 KB
ChadoSpellEditor.ocx	5/12/2006 10:25 am	ActiveX control	1,236 KB
ChadoSpellText.ocx	27/07/2004 12:48 am	ActiveX control	868 KB



Name	Date modified	Type	Size
database_2022-09-13_13-58-03.db	13/09/2022 1:58 pm	Data Base File	108 KB
syncTool_2022-09-13_10-06-19_user.config	13/09/2022 10:06 am	Configuration Source File	8 KB
syncTool_2022-09-13_15-45-41_user.config	13/09/2022 3:45 pm	Configuration Source File	3 KB
syncTool_2022-09-13_16-02-20_user.config	13/09/2022 4:02 pm	Configuration Source File	3 KB
syncTool_2022-09-13_16-07-37_user.config	13/09/2022 4:07 pm	Configuration Source File	3 KB
syncTool_2022-09-13_16-12-36_user.config	13/09/2022 4:12 pm	Configuration Source File	3 KB