

# Accelerate – Shopify Product and Customer Data Management

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ACCELERATE

This document will cover the best practices for managing your Product & Customer data in Shopify so that it can be sync'd into RepSpark. Shopify will be the "source of truth" for all of your product and customer data, so all data manipulation will occur in Shopify before attempting to sync that data into RepSpark.

To sync your data to RepSpark, we require the use of tags.

## Updating Products in Shopify with RepSpark Tags

- By default, ALL products in your Shopify system will be sync'd to your RepSpark site if you do not add Tags to let us know which ones to add and which ones to ignore.
- You may not want every item, or entire groups of items on your B2B site for wholesale purposes, so we have a tagging system that will allow you to select which products to omit from the sync
- There are 3 Tags related to products. See the chart below for format and purpose of each tag.
- Be sure to press SAVE after adding product tags.

*This image shows a properly configured Product ready to sync into RepSpark*

RepSpark

Search

BM Bobby Morqan

Home

Orders 2

Products

All products

Inventory

Transfers

Collections

Gift cards

Customers

Analytics

Marketing

Discounts

Apps

SALES CHANNELS

Online

Blue Knit Belt

Media

Add media from URL

Add media or drop files to upload

Online Store

Schedule availability

Insights

Insights will display when the product has had recent sales

Organization

Product type

Accessories

Vendor

RepSpark

COLLECTIONS

Search for collections

Add this product to a collection so it's easy to find in your store.

TAGS

View all tags

Vintage, cotton, summer

WholesalePrice:17.50

Size

Price

Quantity

Incoming

Add WholesalePrice tag in the Tags section of the Product edit page.

Do not include the \$ sign in the tag for WholesalePrice in this example the Tag is "WholesalePrice:17.50"

If you do not want the product to appear on RepSpark you will add a tag with the label "repspark\_no"

Product Tags	Type	Format
<b>Tag 1</b>	Omit Product from Sync	Input
<b>Tag 2</b>	Wholesale Price	Input:Value
<b>Tag 3</b>	Style Number (Optional)	Input:Value

1. Tag 1 – Omit Product from Sync
  - Tag is simply **repspark\_no**
  - Make sure to include the underscore
  - This denotes that a product is to be ignored from product sync
  - Use this tag to hide items not meant for B2B
2. Tag 2 – Wholesale Price
  - This tag has 2 parts, each separated by a colon:
  - Format is **Input:Value**
  - A proper example would be **WholesalePrice:12**
  - Input is WholesalePrice
  - Value is 12
  - Do not include any special characters, like a “\$”
3. Tag 3 – Style Number (optional)
  - This tag has 2 parts, each separated by a colon:
  - Format is **Input:Value**
  - A proper example would be **StyleNumber:BW1400**
  - Input is StyleNumber
  - Value is BW1400
  - This optional tag can be used to show your actual Product ID number for each item. If this tag is not used the RepSpark will default to import the internal product code from Shopify.

Using Bulk Actions in Shopify to add product tags can be a timesaver! Here’s a quick look at how you can do that for adding the repspark\_no tag

1. Click Products, All Products, then More Filters
2. Select criteria, such as a “Product Type = Clothing”

The screenshot shows the RepSpark interface. On the left is a navigation menu with 'Products' highlighted. The main area is titled 'Products' and shows a list of items. A 'More filters' button is highlighted in the top right of the product list area.

Product	Status	Inventory	Type
Face Mask	Active	0 in stock	Accessories
Knitted Belt	Active	75 in stock for 7 variants	Accessories
Player Fit Woven Short	Active	1,104 in stock for 45 variants	Shorts

3. On the Results page, click the Box to select all

4. Click More actions, then click 'Add tags'

The screenshot shows the 'Products' page with 9 items selected. The 'More actions' dropdown menu is open, and 'Add tags' is highlighted. A text box provides instructions on how to use the 'Add tags' feature.

**Enable Bulk Actions for adding Product Tags**

1. Use the "more filters" option to select some parameters
2. Check the Box to select all results
3. Click the "Add Tags" option to pull up a list of existing Tags or to add a new tag to all selected products.

Product	Status	Inventory	Type
Ashes to A	Active	0 in stock	Clothing
Cutthroat	Active	0 in stock	Clothing
Dancing C	Active	0 in stock	Clothing
Fish Print Solar Top	Active	0 in stock for 5 variants	Clothing
Golden Trout Solar Top	Active	0 in stock for 5 variants	Clothing

## 5. Find the Tag in the list, or type it into the box and press Save

Add tags to 5 product(s) ×

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Use descriptive keywords to help organize products.

Tag



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EXISTING TAGS

another tag RSK Terms:Net 30 WholesalePrice:17.50 WholesalePrice:38  
WholesalePrice:7 yes

Cancel Save

## 6. You will see these two boxes appear at the bottom of the screen



## 7. You have now successfully added a tag to multiple products at once. **Use this to your advantage as you configure your product data!**

## Updating Existing Wholesale Customers Already in Shopify

- If your wholesale client information already exists in Shopify, you will just need to add the appropriate TAGS to each of the account profiles that you want to sync into RepSpark.
- Use the Custom Tags covered below to Denote Wholesale Customers and key customer account info.

*This image shows a properly configured Customer Record ready to sync into RepSpark*

shopify

Unsaved changes

Discard Save

Home

Orders

Products

Customers

Analytics

Marketing

Discounts

Apps

SALES CHANNELS

Online Store

Jim Jones

Ottawa, ON, Canada  
Customer for 3 days

Customer Note

Add a note

Orders placed

This customer hasn't placed any orders yet

Timeline

Show comments

Leave a comment...

Post

Only you and other staff can see comments

4:09 PM

Add Tags Manually using the correct format.  
Tags you've previously used will appear in the list  
for quicker editing later.

Press SAVE at the top right when finished.

Customer overview

Edit

jjones123@gmail.com

DEFAULT ADDRESS

Manage

Jim Jones  
Jones Sports  
100 Main St  
Ottawa Ontario  
Canada

Add new address

TAX SETTINGS

Manage

No exemptions

Email Marketing

Edit status

Not subscribed

Tags

View all tags

VIP, sale, shopper, etc.

SalesRep:111:Larry Lewis

Shipping:Fedex:FedEx Express

Terms:Net30:Net 30

wholesale

Delete customer

Customer has been updated

Settings

Customer Tags	Type	Format
Tag 1	Wholesale Customer Identification	Input
Tag 2	Payment Terms	Input:Value:Label
Tag 3	Shipping Terms	Input:Value:Label
Tag 4	Salesperson Code and Name	Input:Value:Label
Tag 5	Discount Percentage	Input:Value

#### 4. Tag 1 – Wholesale Customer Identification

- Tag is simply **wholesale**
- This denotes that an account is B2B
- Without this tag, a customer record will be ignored by RepSpark sync

## 5. Tag 2 – Payment Terms

- This tag has 3 parts, each separated by a colon:
- Format is **Input:Value:Label**
- A proper example would be **Terms:Net30:Net 30**
- Input is Terms
- Value is Net30 (no spaces)
- Label is Net 30 (properly formatted and spaced)

## 6. Tag 3 – Shipping Terms

- This tag has 3 parts, each separated by a colon:
- Format is **Input:Value:Label**
- A proper example would be **Shipping:UPSG:UPS Ground**
- Input is Shipping
- Value is UPSG (no spaces)
- Label is UPS Ground (properly formatted and spaced)

## 7. Tag 4 – Salesperson Code and Name

- This tag has 3 parts, each separated by a colon:
- Format is **Input:Value:Label**
- A proper example would be **SalesRep:222:Monica Monahan**
- Input is SalesRep
- Value is 222 (no spaces, can be alpha and/or numeric)
- Label is Monica Monahan (properly formatted and spaced)
- Accounts not tagged with a SalesRep will default to code = 0000 for “In House”

## 8. Tag 5 – Discount Percentage

- This tag is completely optional and could vary by customer account
- This tag has 2 parts, separate by a colon:
- Format is **Input:Value**
- A proper example would be **Discount:50**
- Input is Discount
- Value is 50

Shopify Customer TAGS  
Format = FieldName:Value:Label  
be sure to separate each part with a Colon :  
\*\* Some fields do not need a Label

Sales Person	-	Format = <b>SalesRep</b> :<code>:<Name>	→	SalesRep:222:Monica Monahan X
Shipping	-	Format = <b>Shipping</b> :<code>:<Name>	→	Shipping:UPSG:UPS Ground X
Payment Terms	-	Format = <b>Terms</b> :<code>:<Name>	→	Terms:Net45:Net 45 X
Account Type	-	Format = <b>Wholesale</b> **this tag is just a single value	→	wholesale X

Tags [View all tags](#)

VIP, sale, shopper, etc.

## Creating New Wholesale Customers in Shopify

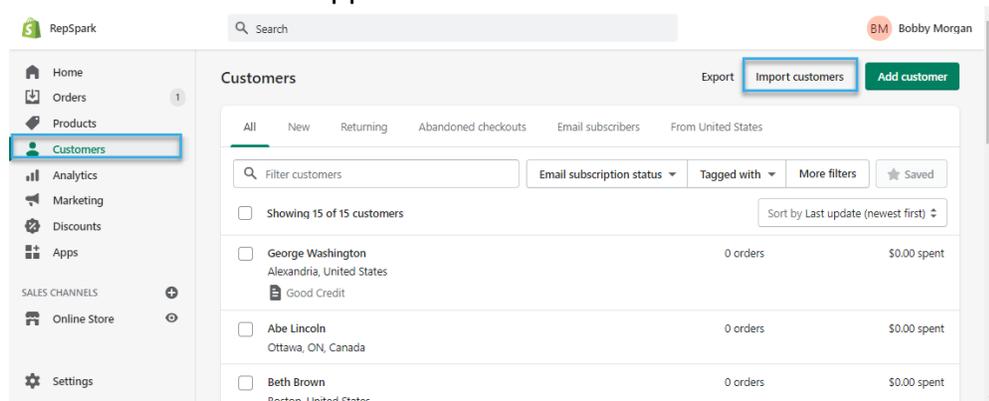
There are two methods for managing your customer records in Shopify. You can use the manual entry by clicking the “Add Customer” button or you can use the Bulk Upload filling out a data file

### 1. Manual Entry

- This is a one-by-one approach.
- Click “Add Customer”
- Fill in all contact information
- Add TAGS as described in Section 1 of this document
- Save and repeat.

### 2. Bulk Upload using a data file

- This is a multi-record approach.



The screenshot shows the Shopify Admin interface for the 'RepSpark' store. The 'Customers' page is active, and the 'Import customers' button is highlighted with a blue box. The page displays a list of customers with columns for name, location, orders, and amount spent.

Customer Name	Location	Orders	Amount Spent
George Washington	Alexandria, United States	0 orders	\$0.00 spent
Abe Lincoln	Ottawa, ON, Canada	0 orders	\$0.00 spent
Beth Brown	Boston, United States	0 orders	\$0.00 spent

- Click Import Customers to open a popup box

Import customers by CSV

Your last customer import finished on December 11, 2020 at 05:20 PM  
2 were imported, 0 failed to import, and 0 were skipped.

[Download a sample CSV](#) to see an example of the required format

Make sure that customers set to Accepts marketing have given you permission. [Read more](#)

↑  
Add file  
or drop files to upload

Overwrite existing customers that have the same email or phone

[Need help importing customers?](#) Cancel Import customers

- Download the Sample CSV file and save it
- It is recommended you rename it to something like “wholesale customers” and with a date, so it might be “*wholesale\_customers\_12.15.20.csv*”
- **DO NOT ALTER** any of the Column Names or remove any columns. This will cause your import to fail. Just fill out the sheet as is.
- The data sheet is mostly straight forward, but there are a couple of fields that need to be mentioned.
  1. Column H – Province
    - a. This is the same as STATE for US customers
    - b. Full spelling, such as Texas
  2. Column I – Province Code is the short code
    - a. This would be TX (instead of Texas)
  3. Columns N, O, P, and R
    - a. These can be left blank
  4. Column Q – TAGS
    - a. **This one is very important for efficient setup of your wholesale accounts to be sync'd into RepSpark. Follow these steps carefully.**

- b. Refer to Section 1 for proper Tag format and requirements
  - c. Add Tags separated by Commas.
  - d. Make sure to be accurate!
  - e. Example: *wholesale, Terms:Net30:Net 30, Shipping:UPSG:UPS Ground, SalesRep:222:Monica Monahan*
  - f. This example contains Four (4) tags, each separated by a comma.
  - g. When uploaded, each tag will be automatically created when the record is generated in Shopify
- Fill out additional rows for each new customer.
  - Save file when finished.
  - Upload Your File into the drop area

Import customers by CSV ×

**i** Your last customer import was successful. 2 were imported, 0 failed to import.

[Download a sample CSV](#) to see an example.

Make sure that customers set to Accepts marketing have given you permission. [Read more](#)

Drag and Drop the CSV file or,  
Click Add File button to select  
from local machine

↑

Add file

or drop files to upload

Overwrite existing customers that have the same email or phone

[Need help importing customers?](#) Cancel Import customers

- Press Import Customers Button, Leave the “overwrite existing customers...” box unchecked.

Import customers by CSV

[Download a sample CSV](#) to see an example of the required format

Added file:

Customers\_Shopify\_List2.csv [Replace file](#)

Make sure that customers set to Accepts marketing have given you permission. [Read more](#)

Overwrite existing customers that have the same email or phone

[Need help importing customers?](#) [Cancel](#) [Import customers](#)

- You will receive an email with the results of your import

Your customer import is complete.

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**Successfully imported: 2**

**Failed: 0**

**Skipped: 0**

[Find out about importing customers](#) at the [Shopify Help Center](#).

- After successful import, return to the Shopify admin “Customers” section and view your newly created accounts. Each of them should look just like the picture at the top of this document, with the RepSpark tags showing in the lower right area.
- If your tags did not come out 100% correct, take the following steps:
  1. Make a COPY of the same sheet you just uploaded.
  2. Call it, previous\_sheet\_name\_v2.csv
  3. Make your edits on the v2 document and SAVE
  4. Return to the Import Customers page and reupload this document, but this time be sure to CHECK the BOX for Overwrite existing customers...
  5. This will update those records with the previous data errors

## Import your Wholesale Customer Data into RepSpark

1. Once your accounts are properly tagged, return to the Admin Dashboard in RepSpark
2. Click on the Connect Data Tab
3. Make sure your data connection is still set to Shopify
4. In the bottom section, click on "Sync Customers" button
5. Be patient will customer import runs. When finished a message will appear in upper right corner letting you know of success or failure.

### Connect Data

**Integration** Shopify

Your account is ready to be customized. Let's start by integrating you in. Choose from one of the options below to import your data from Shopify

https://repspark.myshopify.com

.....

**SAVE**

✓ Your Shopify connection is ready to go!  
Configure your syncs to run automatically [here](#)

Sync Products

Sync Assets

**Sync Manager**

Setup your customer and order syncs here, or setup automatic syncs

Enable Customer Sync

Enable Report Sync

Enable Auto Sync

**SAVE**

Sync Customers

Sync Reports

From the 'Connect Data' Section

Use the "Sync Customers" button to import Shopify Customer data.

The records must contain specific TAGS as described in the configuration documents.

If properly configured, these customer accounts will be ready for Order Creation in RepSpark!!

6. You can rerun the sync any time you wish to pull in new Customer data from Shopify.
7. NOTE: this sync is not scheduled to run automatically, so you'll need to manually sync if an account is missing from RepSpark. Just make sure the record exists in Shopify first and are properly tagged.