



IDA CONNECT

Your Guide to Integrating



This guide covers all you need to know about how to get the best experience when connecting your store to another Sales Channel via IDA Connect . Be sure to read it through and act where needed.

Glossary

Before we dig into the mechanics of how the sync works, lets quickly cover off a few different terms we use.

- 1. IDA Connect** : The application.
- 2. Manager System**: Your main system that holds the Master stock levels and where orders are created & fulfilled. Like your store or other technology.
- 3. Sales Channel**: Where you sell your products, EG: The Iconic.
- 4. Core Sync**: The three main sync workflows that make up most of the work IDA Connect does for you. The workflows are stock levels, new orders and Fulfilment sync.
- 5. SKU**: Stock Keeping Unit is the unique identifier for each variation of item sold. Is the key to matching items between systems.
- 6. Matched**: Variations that we have been able to match either automatically or through a manual linking process.
- 7. Unmatched**: Variations found on a sales channel but could not be matched to a variation on a manager system. These items are unmanaged and as such will not sync orders or stock levels.

How the Sync works

Once you have your store connected to your Sales Channel, IDA Connect then goes to work checking each of your products.

IDA Connect matches any products that are on your Sales Channel that have the same SKU as variants in your store. Then every sync period, IDA Connect checks for any updates in the master stock levels.

If there is a change, it then compares the stock levels with those that should be on each matched product on each sales channel.

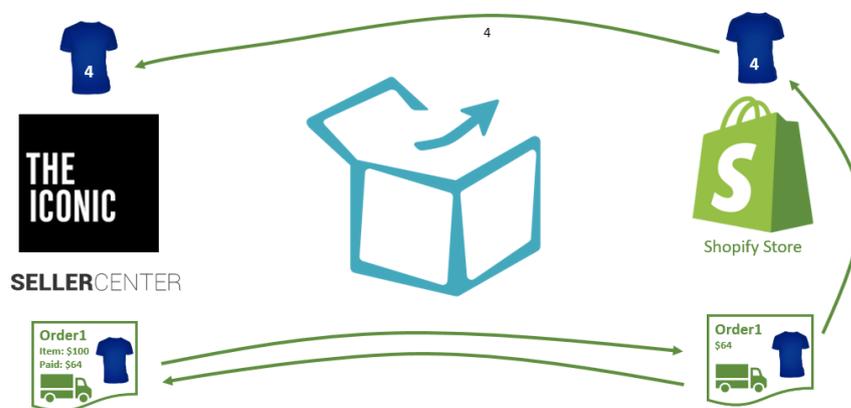
If there is a difference, IDA Connect pushes the updated stock level to the sales channel.

IDA Connect also checks for new orders every sync. If there is a new order on your Sales Channel, the order will be pushed to your store.

And once the order is fulfilled, the details are then pushed back to the sales channel and the order has completed the IDA Connect process.

There are some extra things IDA Connect can do as well. Like add an extra line item to an order to identify the sales channel. Or set a shipping method based on which country the product was purchased in.

We will discuss these in detail shortly.



How to get a good Integrated experience

Here are some of the common issues we see when integrating and how you can fix them to get a better experience.

Get Your SKUs aligned

When it comes to integrating, you need a way to match items on any system you want to connect. You are in luck because any system you want to connect through, IDA Connect already has a way for you to do this.

The Stock Keeping Unit or the SKU is used for this purpose. This single identifier has been used by companies globally for a long time to identify each single variation of the item available.

Nearly all modern systems will use the SKU as a way of identifying each unique variation. This SKU is then used to match items across each system and is why it's a critical piece to get right.

To make sure you get a quick and easy integration, you should make sure that each of your variants have a unique SKU. You can use the Unmatched screen in the IDA Connect Dashboard to make sure you have matched all items

Some issues we see with matching SKUs include having spaces in the SKU or using an underscore instead of a dash or vice versa. The SKU needs to be identical to be automatically matched.

If you are having problems getting your SKUs aligned, it might be worth using an app like Microsoft Excel to analyse your products and SKUs. You can export your lists from your systems and plug them into Excel to see what is happening.

It's sometimes worth trying to open your exported file in a plain text editor as well like Notepad on Windows or TextEdit on a Mac. This helps identify when there are extra characters in your SKU.

Disable Old/Unused Products

With IDA Connect, you will only sync those items that match and those that are active. This helps maintain fast sync times to allow you to sell using one stock pool. If you have a large number of historical

products or you maintain a seasonal catalogue, we suggest you deactivate any products not selling instead of relying on a zero stock count to make the product unavailable.

The best thing is to go through your sales channels and make sure you deactivate any products that are not selling now.

We only sync stock levels for matched products so if you have 2000 products in your manager system and only 100 active on your Sales channel, we will only sync the 100 products, so this will keep things moving fast and reduce the risk of delayed stock level updates.

Have A Manual Process

Due to the nature of integrated systems, we cannot guarantee 100% delivery of orders or stock level updates. Because we don't manage the systems we connect, and we have no control of the Internet, which is how we talk to each of the system, we don't have enough control to make sure the sync is completed error free.

In the cases where syncs could not be completed, you will receive a notification letting you know and, in some cases, you may need to complete a process manually. Having a manual process to ship an order or update stock levels will help in this situation.

We do run the sync regularly as well as use real-time notifications where systems allow for this to make sure we get the sync completed as error free as possible. And the regular sync means that for issues like time-outs, the process will normally run on the next scheduled event.

In any case, it would be very beneficial for you to have a manual process in place for times when things out of our control stop us from automating the process for you.

What can go wrong?

We have just touched on some of the reasons why things can go wrong but let's have a look at the most common issues.

Oversells

Oversells are when a product is sold on a sales channel, but you have no stock available.

There are a few factors that can be in play here. The first thing to check, was the stock level updated prior to the sale?

Some sales channels have conditions where they can cause an oversell due to events like manual payment reviews. We see orders come in days after we sent a 0-stock level update for the product. In this case you will need to log the issue with the appropriate sales channel to have them investigate.

There is a straightforward way to check this. Go to the IDA Connect dashboard and click on the Order to go to the Edit screen. You will see the order items. From here you can click on the Variant SKU to go to the Product screen. On this screen you will see the event log entries.

If you can see an event log for the variation being set to 0 stock and the time stamp on the update was prior to the order time, then you will need to check with the Sales Channel to find out what happened.

If the update happened after the order date, log it with us to investigate. We can see if there were any delays in processing that may have caused the problem.

If there are no updates at all, check the Unmatched screen on the products page to see if it may be that the item is not currently managed, and you need to fix the SKU for the item.

Fulfilment Update Issue

In some cases, you may find that the fulfillment update for an order was not able to be processed. This mainly happens when we cannot automatically match the carrier in the Sales Channel to the one in the fulfillment.

In this case it would be quickest to manually update the tracking details in your Sales Channel and then be sure to go through the Carrier configuration instructions for your sales Channel a little later to make sure you are set up to match carriers correctly.

If you get stuck, log a ticket with our service desk to see if we can better match the carrier.

This is most important when you change carriers. You may find that suddenly there is no fulfillment updates going through because we are unable to match your carrier anymore.

What to Expect

Once you are connected, there is not much more to do. IDA Connect will process your inventories, orders and fulfillments for you. There are a few things to expect in the Shopify order that is created.

Here's a screenshot of an example order from The Iconic, showing what an order will look like in Shopify.

Orders **282450633** August 18, 2018 at 6:47am from IDA Connect Iconic (via import) Paid Unfulfilled

Print order More actions

Unfulfilled (3)

	Blue Kids Tee Blue / 5 SKU: SBE1004-BLU-5	\$99.00 × 1	\$99.00
	Blue Kids Tee Blue / 5 SKU: SBE1004-BLU-5	\$99.00 × 1	\$99.00
	Blue Kids Tee Blue / 5 SKU: SBE1004-BLU-5	\$99.00 × 1	\$99.00

Mark as fulfilled

Paid

Subtotal	3 items	\$297.00
Tax	GST 10% (Included)	\$29.70
Total		\$297.00
Paid by customer		\$0.00

Restock

Timeline Show comments

Notes [Edit](#)
No notes from customer

ADDITIONAL DETAILS [Edit](#)
Sales Channel
TheIconic

Customer [The Iconic](#) [9 orders](#)

CONTACT INFORMATION [Edit](#)
dropshipments@theiconic.com.au
No phone number

SHIPPING ADDRESS [Edit](#)
Test Customer
1 Test Street
Sydney NSW 2000
Australia
61212344567

BILLING ADDRESS
The Iconic
Lv 17, 184 Pitt St
Sydney NSW 2000
Australia
1300668345

- The Iconic order number is used as the order name in Shopify
- The sales channel of The Iconic is added as a note on the order
- The customer is set to The Iconic. This is because you do not get access to the full customer details. Only the Shipping address. And you are selling to The Iconic when you drop ship through their marketplace.
- The billing address is set to The Iconic
- The shipping address is set to the end customer you will be shipping to

Replace The Iconic with other Sales Channels to get an idea of what the order will look like.

Getting Started

To get started, visit the Register page and create a new account:

<https://go.idaconnect.app/register>

Enter your details and click on the Register button

IDACONNECT

Login Register

Create A New Account

Enter your details

Company Name

Your Name

Email Address

Password

Confirm Password

I'm not a robot

reCAPTCHA
Privacy - Terms

Register [Existing account?](#)

Once your account is created, the setup wizard will begin.

Connect Your Primary Store

The next step is to connect your Manager connector. At the time of writing we only have Shopify available as a technology, however, others are on their way this year.

1. Click on the Shopify icon

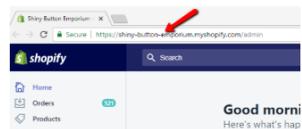
Add First Manager Connector



Grab your Shopify Store admin URL and paste it into the Shop URL box. You can be on any page in your Admin area and simply copy the URL from the browser into the Shop URL.

Add Shopify Connector

Please enter the Shopify store URL below.
Here is a screenshot of where to get your
Shopify store URL from:



Shop URL

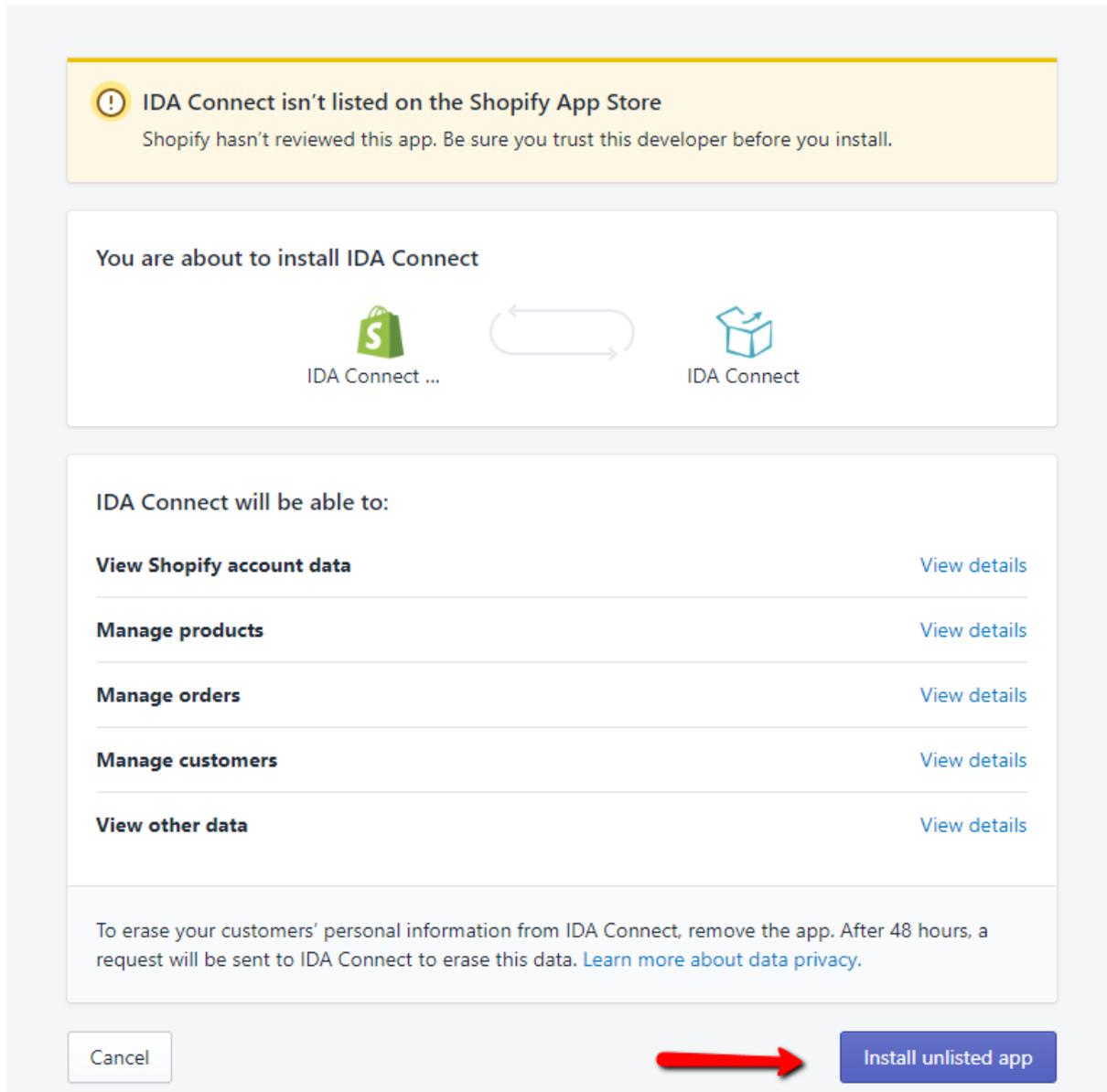
Active:

[Back](#)



2. Click the Add button.

You will be redirected to your Shopify store to confirm the install of the IDA Connect app in your store.

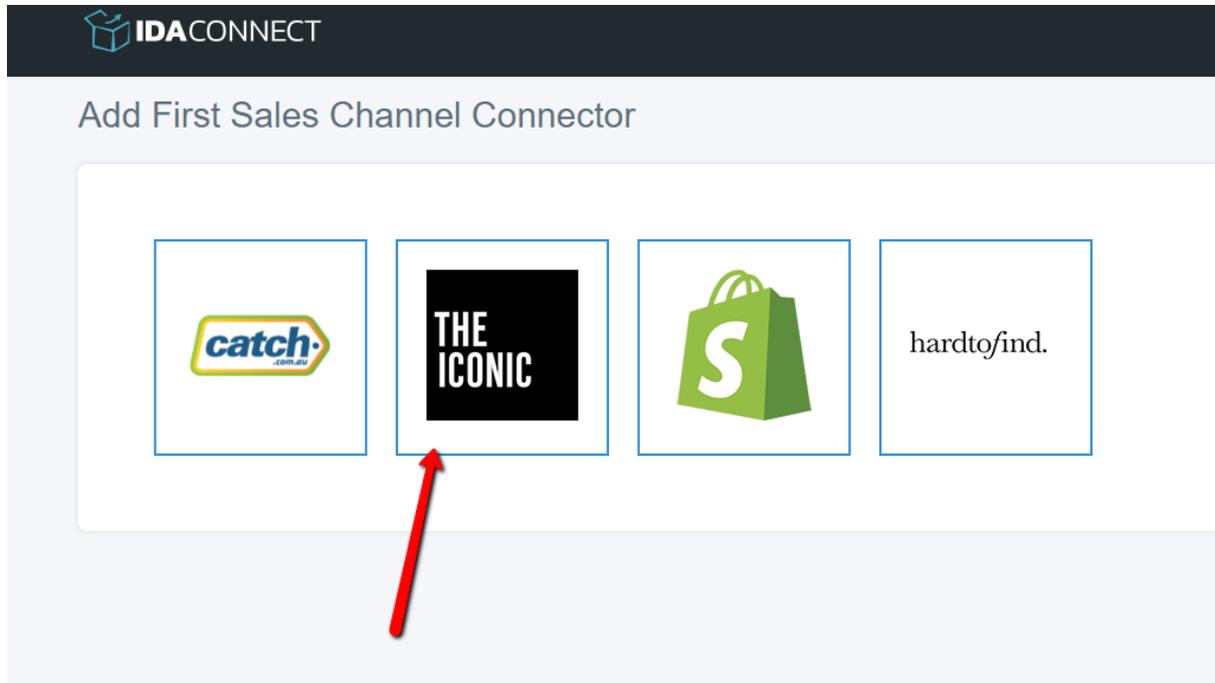


3. Have a read through the details and make sure you are comfortable with the access level we request. These are needed to provide the sync. Once ready, click the Install unlisted app.

Please note, as of writing, the IDA Connect app is NOT listed due to Shopify forcing us to use their billing system if we are to list the app.

Your Primary Shopify account is now added.

4. Next select the Sales Channel you would like to connect. In this example, we will install The Iconic channel.



5. The next screen will ask you to follow some steps to connect your sales channel. Each channel has different instructions. Follow each step, add the information back to IDA Connect and click the Add button.

Add Theiconic Connector

Which Site?

Live

Set to Live for all connections. Test used for internal use only

API User

API Key

Active:

Yes

[Add](#) [Back](#)

To connect to your Iconic account, you will need to create a special type of user for your Seller Center account. To do so, follow these steps:

1. Log into seller center
2. Click on Manage Users menu option in the Settings menu
3. Click on the Add User button
4. Fill in the user details as follows:
 - Role – select Seller API Access
 - Email: set to yourbrandname@idconnect.app changing 'yourbrandname' for your brand
 - Name: set to 'IDConnect App'
5. Click Save

This will create a new user in your Iconic Seller Center account. Copy and paste the email and API key details from The Iconic Seller Center into this page and click connect.

6. The next screen will ask you to select a billing plan. Have a read through each plan. If you are unsure, select the Start plan and see how things go. Your Free 14 day trial is the same as the Scale account.

Choose a billing plan

Please select a plan that will suit your business. the plan will not start until after the 14 day free trial.

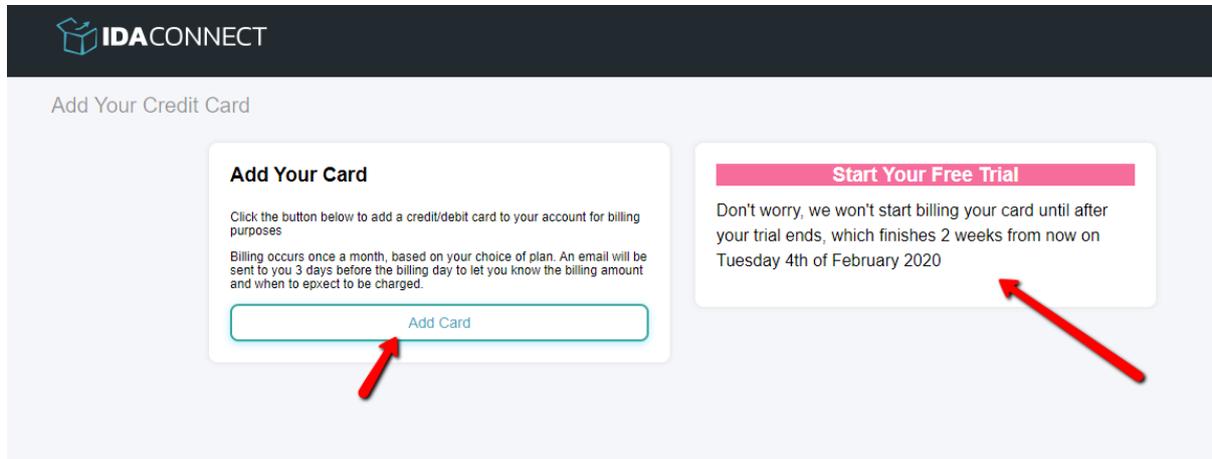
Start	Grow	Scale
\$ 1 /order	starts at \$ 79 /month	starts at \$ 199 /month
<p>Pay just \$1 for each order processed</p> <p>Connect a single master account</p> <p>Connect unlimited marketplaces</p> <p>Includes inventory, order and fulfillment workflows</p> <p>Updates occur every 60 minutes</p> <p>Control inventory levels with Reserved Stock</p> <p>Concierge support to point you in the right direction</p> <p>Setup session available for \$199</p>	<p>Pay \$79 per month or 1% of processed order value*, which ever is higher</p> <p>Connect single master account</p> <p>Connect unlimited marketplaces</p> <p>Includes inventory, order and fulfillment workflows</p> <p>Updates occur every 30 minutes</p> <p>Control inventory levels with Reserved Stock</p> <p>Concierge support to point you in the right direction</p> <p>Setup session available for \$199</p>	<p>Pay \$199 per month or 1% of processed order value*, which ever is higher</p> <p>Connect multiple master accounts**</p> <p>Connect unlimited marketplaces</p> <p>Includes inventory, order and fulfillment workflows</p> <p>Updates occur every 5 minutes plus add custom workflows</p> <p>Control inventory levels with Reserved Stock</p> <p>Concierge support to point you in the right direction</p> <p>Setup session included</p>
Start Free Trial	Start Free Trial	Start Free Trial

* based on orders processed (created) in your master system in the previous month.

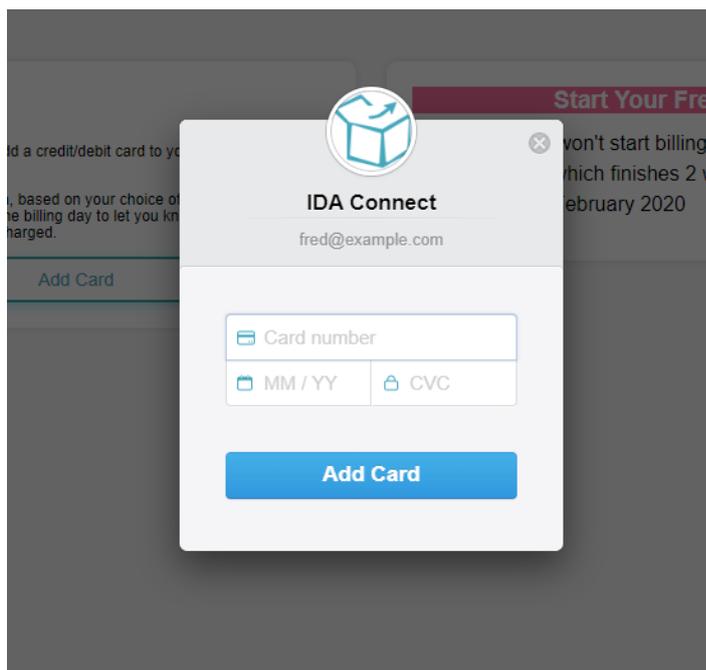
** new account for each master system but billed in one account.

7. Click on the Start Free Trial of the plan you wish to start with.

8. The last step is to add your billing card to your account. This is to ensure your account continues after the trial. You can see on the page when the trial ends.



9. Click the Add Card button and see the Stripe pop up asking for your details.



Please note, we use a service called Striupe to handle payments. Stripe is a secure payment system and we DO NOT hold any details in our system with your credit card details. These are stored securely with Stripe.

10. Once added, the setup wizard is finished.

Congratulations! You're All Done.

You have finished the initial setup of your IDA Connect account.

First things first. We need to get your product information before we can enable the sync for you. This is running in the background and we will send you an email to fred@example.com when the process is completed.

You will also get notified if there are any problems we find like unmatched SKUs or a carrier configuration issue.

Keep an eye out for the email. If you need help or have a question, click the blue question mark in the bottom right to start a chat or send us an email outside of business hours. We will get back to you quickly with a response.

Thank you for choosing IDA Connect.

[Go To Dashboard](#) 



Your account is now set up. There will need to be a full product sync completed before your sync will work correctly. This can take up to an hour or so based on the number of products you have in your Shopify and sales channel accounts.

You can monitor the progress on the IDA Connect Dashboard.

The Application

Once you are set up, there are a few pages you should get familiar with and can use to confirm things are working for you.

Dashboard

The screenshot shows the IDACONNECT dashboard interface. At the top, there is a header with the IDACONNECT logo and a user profile icon labeled 'FJ'. The main content area is titled 'Dashboard' and is divided into several sections:

- Connectors:** A section with an 'Add A Connector' button. It displays two active connectors: 'Sales Manager' (represented by a green shopping bag icon) and 'Sales Channel' (represented by 'THE ICONIC' logo).
- Workflows:** A section with a 'Next Run: 24 seconds ago' button and a 'Every 60 mins' indicator.
- Orders for January:** A summary table showing 0 processed orders, \$0 order value, 0 open orders, and 0 aged orders (older than 4 days).
- Orders for December:** A summary table showing 0 processed orders, \$0 order value, 0 open orders, and 0 aged orders (older than 4 days).
- Products:** A section with a 'View Products' button, showing 2 matched products and 0 unmatched products.
- Latest Activity:** A list of recent events, including request completions, inventory updates, and inventory level updates for various SKUs.

A red circular icon is visible in the bottom right corner of the dashboard.

The main dashboard gives you a lot of information about how your account is going. At the top of the dashboard, you can see your connected channels and are able to add more sales channels from here.

Next you see the orders for the current and previous months. Once you start processing orders, you can click on the Processed orders to see a list of orders for the month.

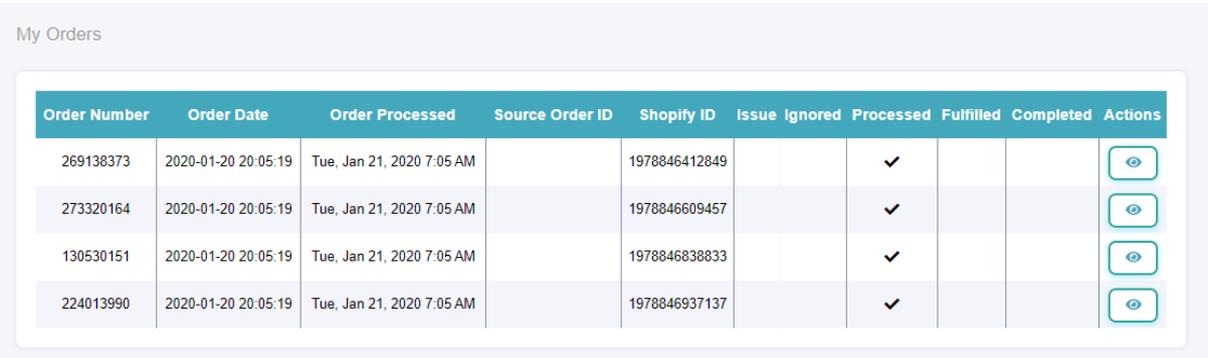
Below this is the Products stats. You can see in our example that we have 2 matched products and 0 unmatched. If you have unmatched SKUs, you should click on the square to see a list of SKUs that could not be matched. If you are expecting any of these to be matched, you should review the SKUs in both systems. See previous chapter on how to review SKUs.

On the right you can see the workflow status, how often the workflows will run and when to expect the next workflows to run.

Under this is the Activity feed. You can scroll down this feed to see what the latest things are that IDA Connect has completed.

Order List

The order list can be accessed by clicking on the Processed orders for the month.



Order Number	Order Date	Order Processed	Source Order ID	Shopify ID	Issue Ignored	Processed	Fulfilled	Completed	Actions
269138373	2020-01-20 20:05:19	Tue, Jan 21, 2020 7:05 AM		1978846412849		✓			
273320164	2020-01-20 20:05:19	Tue, Jan 21, 2020 7:05 AM		1978846609457		✓			
130530151	2020-01-20 20:05:19	Tue, Jan 21, 2020 7:05 AM		1978846838833		✓			
224013990	2020-01-20 20:05:19	Tue, Jan 21, 2020 7:05 AM		1978846937137		✓			

On the list, you will see all orders that have been processed, any orders that have been ignored (because the SKUs don't match) and if we have had any issues processing the order.

You can click the eye button in the Actions column to view the order.

Order Details	
Order Id	48994
Order Number	269138373
Manage Order Id	1978846412849
Order Date	2020-01-20 20:05:19
Processed at	2020-01-21 07:05:21
Status	Issue: No Ignored: No Processed: Yes Fulfilled: No Completed: No
Total	\$108.9
Num Order Items	3

Order Items				
ID	SKU	Name	Quantity	Discount
4107	SBE1004-BLU-6	Kids T-Shirt XS	1	44.55
8504	SBE1004-BLU-5	Kids T-Shirt L	1	44.55

Fulfillments

Source Order

```

Array
(
    [Price] => 60.00
    [OrderId] => 866148
    [Remarks] =>
    [Statuses] => Array
    )
    
```

Billing Address	
First Name	The
Last Name	Iconic
Email	dropshipments@theiconic.com.au
Address 1	Lv 17, 184 Pitt St
Address 2	
City	Sydney
Country	Australia
Country Code	AU

Manager Order [View source](#)

```

Array
(
    [id] => 1978846412849
    [name] => 269138373
    [note] =>
    [tags] =>
    [test] =>
    )
    
```

Shipping Address	
First Name	Test
Last Name	Customer
Email	test@example.com
Address 1	1 Test Street
Address 2	
City	Sydney
Country	Australia
Country Code	AU

Associated Events	
Activity	Details
IB 6 minutes ago	IDA updated an order
IB 6 minutes ago	created new order in Shopify. Order number 269138373
IB 6 minutes ago	IDA created an order



On the Order View screen, you can see all the details of the order. The associated events will show you what tasks IDA Connect has performed to date with the order.

There is also a Retry button at the top of the screen. This will attempt to reprocess the order into Shopify. If the order already exists, you will need to cancel the order if you wish to recreate it.

Configure Shopify Options

To change the Shopify settings, click on the Settings button next to your Shopify connector on the dashboard. This will take you to the settings screen

IDACONNECT

Edit Shopify Connector

Location
No location

Choose the Shopify location to use for inventory and orders. Change to No Location to use total inventory

Shipping Method

Add a shipping method to all orders

Advance Shipping Method

Add this shipping method to orders for a different country. Add the country code and shipping method separated by a colon (EG NZ:International Freight Co)

Tax Included in order price
Yes

Use SKU for order items?
No

Set to Yes if you do not want order items tracked to the matched variant in Shopify. Leave as no to have inventory automatically updated for matched items

Include shipping line on order
No

Select Yes if you would like a shipping line item added to orders. Currently hardcoded to 50

Active:
Yes

Update Back

Delete connector

Disable Product Sync

Disable Inventory Sync

Disable Order Sync

Disable Fulfillment Sync

Here you can make the changes you like and click on Update to save.

The settings are:

- Default Shipping Method – Add a shipping method to each order created in Shopify

Advance Shipping Method – Add a second shipping method to an order based on the country code for the shipping

- Tax included – Will create the order based on inclusive tax
- Include free shipping – Adds a Free Shipping method to the order

- Commission rate – Have the Iconic commission rate removed from the order total. Enter as the whole percentage paid to The Iconic
- Active – Use to switch connector on and off

The actions include:

- Remove connector – De-connect your store
- Disable Inventory sync – Will stop inventory sync from running automatically
- Disable Order sync – Will stop the order sync from running automatically
- Disable Fulfillment sync – Will stop inventory sync from running automatically

Configure Iconic Options

To change the Iconic settings, click on the Settings button next to your Seller Center connector on the dashboard. This will take you to the settings screen

Edit TheIconic Connector

Which Site?

Set to Live for all connections. Test used for internal use only

API User

API Key

Reserved Stock Amount:

Set the amount of stock you want to reserve when syncing stock levels to The Iconic. Num of units.

Default Carrier:

Set to Carrier name in Seller Center if you use one carrier only. Leave blank to attempt to match carriers.

Fulfillment Status:

Choose which fulfillment status to set orders to in Seller Center. If you choose Ready To Ship, you will need to manually complete the order in Seller Center as Shipped.

Order Price:

Choose which order price to use when fetching Iconic orders. Paid price is the item price minus and discounts.

Add Iconic Line Item:

Adds and extra zero value line item with SKU and description as The Iconic to help identify Iconic orders.

Active:

[Back](#)

To connect to your Iconic account, you will need to create a special type of user for your Seller Center account. To do so, follow these steps:

1. Log into seller center
2. Click on Manage Users menu option in the Settings menu
3. Click on the Add User button
4. Fill in the user details as follows:
 - o Role – select Seller API Access
 - o Email: set to yourbrandname@idconnect.app changing 'yourbrandname' for your brand
 - o Name: set to 'IDConnect App'
5. Click Save

This will create a new user in your Iconic Seller Center account. Copy and paste the email and API key details from The Iconic Seller Center into this page and click connect.





Here you can make the changes you like and click on Update to save.

The settings are:

- Site – Keep this set to Live
- API user and password – As set during the install process. If you need to change the details you can do so here
- Reserved Stock Amount – Set a reserved stock amount and have this removed from the inventory level synced to Iconic to make sure you always have stock to fulfil Iconic orders
- Default Carrier – If you only use one carrier and the carrier does not match, you can set the default here to the carrier in Seller Center

- Fulfillment Status – Choose which fulfillment status you wish orders to be set to in Seller Center

Order Price – Choose which price to use for line items in Iconic orders. Item price is the listed price in Iconic and the Paid price is minus any discounts applied

- Active – Use to switch connector on and off

The actions include:

- Remove connector – De-connect your store
- Disable Inventory sync – Will stop inventory sync from running automatically
- Disable Order sync – Will stop the order sync from running automatically
- Disable Fulfillment sync – Will stop inventory sync from running automatically

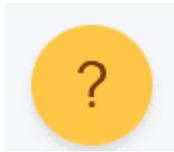
Managing Products

The main thing that needs to be done with products is to ensure we can match all your products in your Sales Channel with ones in Shopify. As mentioned previously, we use the SKU to match products. You can see on the dashboard how many products IDA Connect has matched and if there are any unmatched products that need fixing.

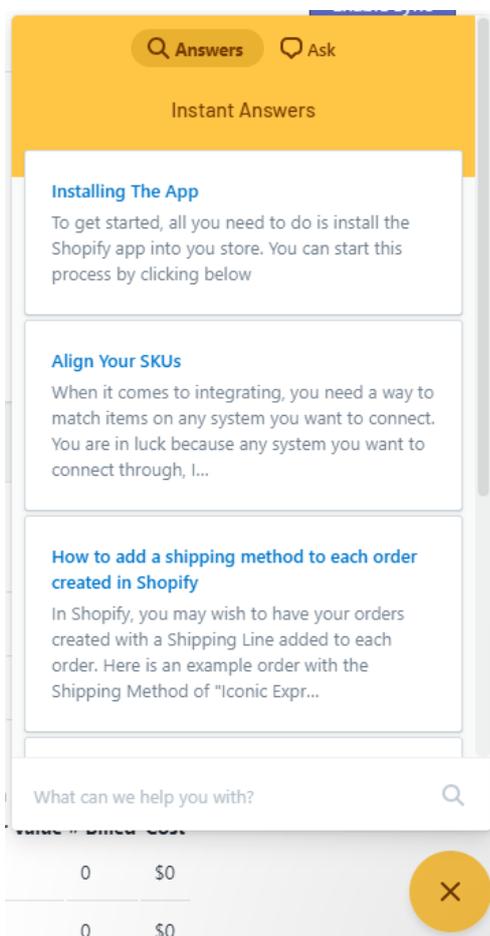
If you have any unmatched SKUs, click on the Show Unmatched to see a list of the products that IDA Connect could not match. Once you have fixed the issues, you can wait up to 5 minutes for the next sync to run or click on the Run Inventory Sync button

Getting Help

If you need any help through the install process or any time after install, you can log a ticket to our helpdesk by clicking on the yellow question mark in the bottom right from the screen



You can start by browsing the available answers and see if the problem is described here.



If you cannot find the answer, click on the Ask tab at the top. If our support team are available, you can start a Live Chat to get someone to help you. If not, you can select the Email option to log a ticket with our support desk and someone will get back to you quickly.