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# **Sellbrite Integration**

Cavallo Support - 2024-12-03 - Integrations

#### Overview

Integrating SalesPad Cloud with <u>Sellbrite</u> takes the headaches out of managing multiple online sales channels. With the Sellbrite integration, all of your Sellbrite sales channels are updated through SalesPad Cloud, ensuring that your inventory data across each of your stores is up-to-date and accurate.

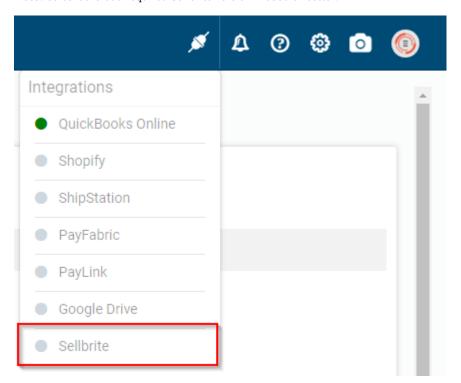
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#### Connect to Sellbrite

To connect your SalesPad Cloud company to your <u>Sellbrite</u> account, select **Sellbrite** from the Integration dropdown in the upper right-hand corner of the screen.

Note: SalesPad Cloud required Sellbrite version Pro500 or better.



Enter your Sellbrite connection credentials into the appropriate fields. Your API Key (called Account Token on your Sellbrite account) and API Secret (called Secret Key on your Sellbrite account) credentials are found in the API section of your Account Settings with Sellbrite. Click **Setup Connection** to connect your accounts.



Once you've established a connection, toggle the Importing Enabled and Exporting Enabled options if you're ready for those actions to take place, then click **Update Connection**. If you're not ready for your items to sync across Sellbrite and SalesPad Cloud, you can toggle those options at a later point by navigating back to the Sellbrite Integration screen.

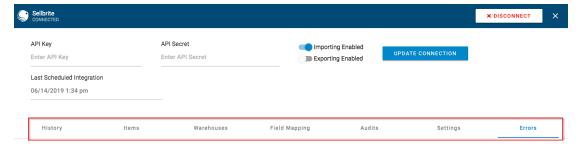


When SalesPad Cloud connects to Sellbrite, SalesPad Cloud only imports item information. Item Cost and Quantity information are not imported. To get your Sellbrite Item Cost and Quantity information into SalesPad Cloud, you must create an initial purchase receipt or adjustment in with that information on the transaction.

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#### **Sellbrite Integration Grid**

Once your Sellbrite account has been connected to your SalesPad Cloud account, you will manage the integration from the Sellbrite integration grid. Navigate to different tabs on the grid by clicking on the appropriate tab header.



# History

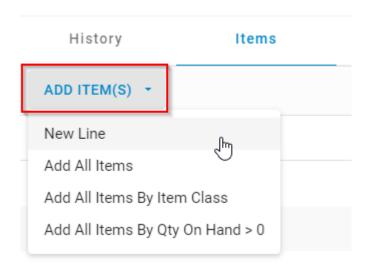
The History tab on the Sellbrite integration grid displays a history of Sellbrite imports and exports, as well as any error messages that resulted from failed imports or exports.

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#### **Items**

The Items tab on the Sellbrite integration grid displays a list any items in SalesPad Cloud that have been tied to a product in Sellbrite. This includes any of your SalesPad Cloud items you have chose to export to Sellbrite, plus any of your Sellbrite products that have been imported into SalesPad Cloud.

If you have importing enabled, your Sellbrite items will automatically populate the Items grid. To add SalesPad Cloud items to the Items grid, click **Add Items** in the upper left-hand corner of the grid. Any SalesPad Cloud items that you add to the grid will then be exported to Sellbrite.



You can add individual items by creating a new line and selecting the item from the list that appears, or you can opt to add all of your SalesPad Cloud items, all items from an <a href="Item Class">Item Class</a>, or all of your on-hand items that you have in stock.

When an item import is initiated, SalesPad Cloud will attempt to match items on SKU or Item Number/Product Name before they are imported into SalesPad Cloud. If a match is found, a duplicate item will not be created.

**Note:** Variant items in SalesPad Cloud will only be exported to Sellbrite as Variant items if both the parent item and it's children are configured to export. If only the children are configured to export, they'll be exported as normal inventory items. Adding the parent after the children have been exported will update those items to Variant Children. Not all children need to be exported; some can be omitted.

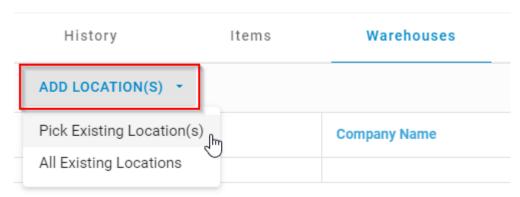
Variant items from Sellbrite will only be imported as inventory items to SalesPad Cloud. Their variant relationship is not preserved.

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# Warehouses

When using Sellbrite through SalesPad Cloud, items are are pulled from any number of SalesPad Cloud Locations and sent to a designated Sellbrite warehouse (configured in the Settings tab). The Warehouses tab is where you choose the SalesPad Cloud Locations you want to use to pull inventory from.

To add a location, click **Add Location(s)** in the upper left-hand corner of the grid.



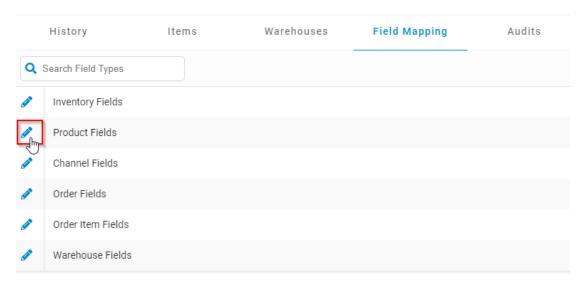
You can either choose an individual Location or add all of your currently existing Locations to the grid.

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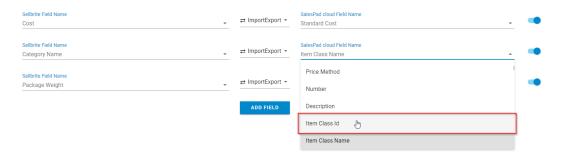
# **Field Mapping**

The Field Mapping tab on the Sellbrite integration grid allows you to configure field mappings between your Sellbrite and SalesPad Cloud accounts. For instance, the default SalesPad Cloud mapping for Sellbrite's Category Name field on one of their products is Item Class Name. If you wanted to change that to Item Class ID, though, you can do that using the Field Mapping tab.

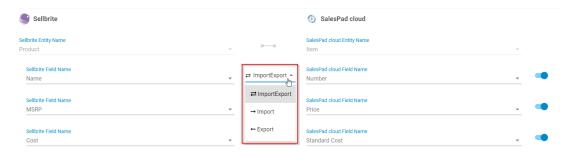
To edit a field mapping, first choose the Sellbrite field category in the Field Mapping tab by clicking the **Edit** icon to the left of the category name.



Find the field mapping you want to change and choose one of the available options in the dropdown.



The ImportExport dropdowns between the entity name columns allow you to specify that field mappings change on import, export, or both.



If you want to remap a field that you don't see listed, click the Add Field button at the bottom of the screen.

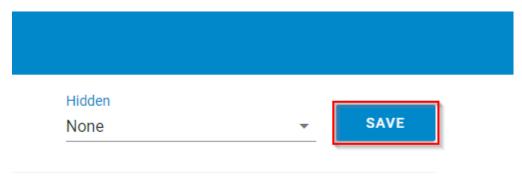


A blank row will appear at the bottom of the screen. Choose from the available entity names from the Sellbrite and SalesPad Cloud Field Name dropdowns.

To stop a field from mapping entirely, toggle the row you want to disable using the button to the far right.



To save your field mapping changes, click **Save** in the upper right-hand corner of the screen.



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#### **Audits**

The Audits tab displays changes made to settings, item or warehouse configurations, or the Sellbrite integration itself. To export an .xlsx file of this grid, click the **Export** icon in the upper right-hand corner of the grid.



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#### **Settings**

Your Sellbrite integration comes with a handful of settings to configure, and those are found in the Settings tab of the Sellbrite integration grid.

Customer Import Option - Allows you to choose between Customer Per Address, Customer Per Channel, or Single Customer for importing customers from Sellbrite; Customer Per Address creates a customer for each email address on a sales order, Customer Per Channel creates a customer for each sales channel (Shopify Customer, Amazon Customer, etc.), and Single Customer creates a single customer for all Sellbrite sales orders named "Sellbrite Customer"

 $*Tax\ Item$  - Indicates the inventory item used to represent taxes on Sellbrite sales documents

 $*Imported\ Payment\ Method\ -$  Allows you to choose a Payment Method to use for payment information imported from Sellbrite

Sellbrite Warehouse - Indicates the Sellbrite warehouse that SalesPad Cloud will send inventory quantity to

 $Should\ Import\ Sellbrite\ Items\ \hbox{-}\ If\ selected,\ Sellbrite\ products\ will\ be\ imported\ into\ SalesPad\ Cloud$ 

 ${\it Sales Transaction Type} \ {\it Indicates the SalesPad Cloud } \ {\it Sales Document Type} \ that sales orders imported from Sellbrite are converted to}$ 

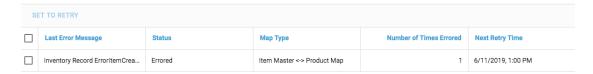
Shipment Export Batch - Indicates the Workflow batch that Sellbrite monitors for documents that could be exported to Sellbrite (documents that have appeared since the integration last ran)

\*These settings need to be configured in order to import sales documents.

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#### Errors

If a particular item, document, or shipment fails to import or export between SalesPad Cloud and Sellbrite, the error will be recorded in the Errors tab. This tab will show a list of the errored objects, along with their current status, the number of times they have errored, and the next time the integration will retry importing/exporting the object.



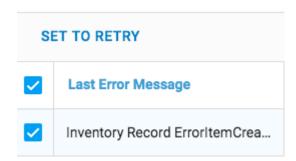
Clicking the eye icon in the Last Error Message column will pull up the full error message.



# Inventory Record ErrorItemCreator failed to import into SPC.

Once the "Next Retry Time" has arrived, the next time the integration runs (the integration runs once every ten minutes), the object will be retried. If it succeeds, it will be removed from this list. If it fails again, it will be set to retry again, but after a longer interval than the previous try. Each time the object fails to import or export, it will be "backed off" for a longer period of time, maxing out at 24 hours after seven failed attempts.

To retry an errored object sooner, check the box on the left of the row, and then select **Set to Retry** above the grid.



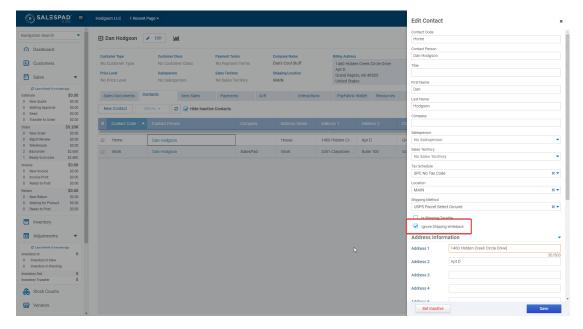
The object will then be marked labeled as "Pending Retry", and the import or export will be re-attempted the next time that the integration runs.

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#### **Ignore Shipping Writeback**

When a customer places an order through an ecommerce store that uses shopping carts, such as Shopify, eBay, or Amazon, shipping costs are typically included in the order total. Because of this, it's not necessary to include shipping writeback costs on the order once that order has been pulled into SalesPad Cloud.

To ensure that shipping writeback costs aren't added to these orders, check the Ignore Shipping Writeback checkbox on the Contact card for that <u>customer</u>.



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# Disconnect from Sellbrite

To disconnect your Sellbrite account from SalesPad Cloud, simply navigate to the Sellbrite integration screen and click  $\bf Disconnect$  in the upper right-hand corner of the screen.



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