EXPERT'S GUIDE

INTEGRATIONS

MESA

Expert's Guide to Salesforce and Shopify integrations for
eCommerce business types

Summary

When it comes to connecting Salesforce and Shopify, there's not much Mesa can't do. Mesa removes the constraints that typically come with integrators - that they only allow you to work within their pre-chosen parameters. And that can work for some companies, temporarily. Chances are, though, at some point you're going to need your integration to function in ways no one else does.

Mesa removes these boundaries by providing a canvas where you can custom define integrations. Let's look at a few examples of the creative integrations that Mesa can provide when businesses need to look outside the confines of the pre-defined integrations.

B2B eCommerce

Let's consider the wholesaler whose online storefront is run on Shopify, but much of the sale occurs in a one-to-one sales context. In this case, the customer may only visit the storefront once or even not at all before submitting an estimate request to the company.

The salesperson will interface almost completely with Salesforce to track their interactions with the customer. However, the ultimate sale must go through Shopify's system as that is where both payments are taken and inventory is stored. That means that when the salesperson creates a price quote for the customer, the quote must be sent to the customer as a draft order in Shopify so the customer may finalize the payment through Shopify's payment system. Manually, these individual actions add up to a lot of wasted time that the salesperson could be using to focus on selling to new customers.

This is where Mesa comes into play. Mesa can use the creation of an estimate in Salesforce to trigger the creation of a draft order in Shopify and then import the data from the estimate to the draft order. After that, the salesperson can send out the draft order to the customer to complete. At this point, Mesa will also take the payment details from Shopify and store them back on the customer profile in Salesforce.

In this case, Mesa knits Shopify and Salesforce's strengths together automatically, letting the sales team focus on their strength, sales, rather than on administrative work.

Non-profit

In the next example, we have a nonprofit animal rescue. They have an online pet supply store built on Shopify to supplement their fundraising. They use Salesforce for their fundraising team to store donor information. These donors also get a discount at the online shop. Without a connection between the two systems, the nonprofit can only give the donor discount at their physical store. Furthermore, the fractured reporting has resulted in the fundraising team not having a full view into their donors' activities and financial contributions.

Mesa facilitates the communication between Shopify and Salesforce here in several ways. First, when a new donor is created in Salesforce, Mesa creates a new customer in Shopify and tag them as a donor. After that, the nonprofit uses Shopify's Scripts (available on their Shopify Plus account) to automatically apply the discount on all orders placed by any customer with that "donor" tag.

Once the sale is placed, Mesa then sends the payment information back into Salesforce so that the fundraising team can accurately track the donors' actions and monetary contributions. Such visibility into donor's engagement with the nonprofit can help the fundraising team make more educated decisions about their messaging and targeting, resulting in more donations.

Wholesale & Direct-to-consumer

Lastly, let's look at the example of a company that is both a wholesaler and a DTC retailer. In this case, the company has a B2B focused sales team that operates entirely out of Salesforce, while a B2C facing operations team works out of Shopify, completely siloing both departments. However, it's quite likely that some wholesale customers will discover or otherwise interact with this company via the DTC storefront. The siloed departments are resulting in many lost leads for the wholesale team.

Here, Mesa does work of identifying wholesale opportunities that come in off the DTC website, de-siloing these two sections of the company to ensure that wholesale customers are getting the uninterrupted customer experience they expect to receive.

For instance, when an order comes into Shopify with a quantity of 20 or more items, Mesa triggers a Shopify tag labeling the customer as a "wholesale opportunity." Then, Mesa sends the contact into Salesforce, where it will simultaneously create a custom property for the new contact in Salesforce, tagging it as a wholesale opportunity there as well. Mesa then creates a new opportunity in Salesforce for a future sale and automatically assign a B2B salesperson to this opportunity. Finally, Mesa triggers an initial welcome or introduction email to the contact in the B2B salesperson's name.

Conclusion

In each of these cases, Mesa fills the gap between Shopify and Salesforce so that every department has complete transparency. as to the actions of your customers and all your customers have a seamless experience as they navigate between your sales team and your storefront.

Questions? Contact Us.

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