With WebLink’s Bigcommerce app, you have the ability to set up a state-of-the-art, highly configurable online store while sustaining a seamless flow of information to your membership and revenue tracking in WebLink Connect. This guide walks you through the steps you’ll need to take to get your store up and running and integrated seamlessly with your database.

Note that while this document does list the important things you’ll need to do in Bigcommerce to get your store going, the focus is primarily on your integration with WebLink. You can find many more details on [Bigcommerce University](https://support.bigcommerce.com/university), as well as in their [Store Launch Guide](https://support.bigcommerce.com/articles/Public/Store-Launch-Guide/?q=category+level+discounts&l=en_US&fs=Search&pn=1).

This guide reviews the following items:

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Throughout this document, click the  icon to view a WebLink Knowledge Base article with step-by-step instructions, or the  icon to view a Bigcommerce Support article.

# **Download the app and get connected**

To complete the integration with WebLink, you’ll need to download the WebLink “app” in the Bigcommerce store. To find the app, log in to your Bigcommerce account and click the Apps button on the far left of the screen:



In the app store Marketplace, search for “WebLink.” Follow the prompts to download and install the WebLink Connect app. At the end of this process, you will be prompted for your WebLink Connect license key, which you used to initially install WebLink Connect. If you do not have your license key noted, you will need to contact Support at 1-888-865-8555 and they can provide it.

Once you enter your license key, the WebLink logo will appear to the left of your Bigcommerce store and you are ready to go!

# **Set up your store in Bigcommerce**

Bigcommerce offers design tools and templates to get your online store looking snazzy, as well as a wide range of options for easy-to-purchase products. This is a step for which you’ll want to budget plenty of time, given the large number of customization options and the importance of your store’s external presence.

* **Configure your store settings **Click Setup & Tools in the upper right corner, then under “Customize your store” click Store Settings. You’ll see a number of tabs for the different types of settings, including your website, store display, images, language settings, and more. In particular, be sure to review the following under the “Display” tab:
	+ Display Settings: enable your desired features of your store’s appearance 
	+ Category Settings: configure the presentation options for store categories
	+ Product Settings: determine which options to display for products for sale
* **Create categories and products**The meat of your online store, you’ll need to set up each product you plan to sell in your store, along with categories in which to place your products and options for each product.
	+ Create categories by clicking the “Products” menu, then select Product Categories. The default categories are displayed for you to edit, and you can click Create a Category to add your own, including sub-categories. 
	+ Set up options for the items you’ll be selling, including color, language, sizes, and more, under Products > Product Options. You can add these after you’ve created products, but it’s best to get the basics set up so you’re ready for the next step. 
	+ Add products by clicking the “Products” menu, then Add a Product. You can enter the product name, price, category, and description. There are also tabs along the top of the screen, where you can include images, set inventory, create bulk pricing options, and more. 
* **Set checkout, payment and shipping options**Click on the Setup & Tools link in the upper right, and you’ll see a number of options under “Set up your store” that manage the actual process of purchasing items.
	+ Payments: select the different methods of payment you want to accept in your store, including your own credit card gateway, PayPal, and many other options. 
	+ Shipping: determine what shipping options you want to offer and how you’ll charge purchasers for shipping 
	+ Tax: you can set your tax to be calculated manually or automatically 
* **Design your store’s theme **Starting with one of Bigcommerce’s many templates, you can customize the look and feel of your online store with images, banners, custom colors, and more.

# **Configure your WebLink revenue and profile sync options**

Once your Bigcommerce store is ready to go, you’ll need to configure a few settings to make sure your revenue winds up in the right place in WebLink, and your members get the correct pricing. By completing the settings listed below, you’ll ensure a seamless integration between the two systems.

* **Set your revenue defaults **Your integration with Bigcommerce will automatically create invoices in WebLink when orders are placed. To ensure all revenue and payments are properly imported, you’ll need to select the correct WebLink codes to use for all transactions. You can access these settings in WebLink, under Admin > Set Preferences > Bigcommerce Settings, then click open Invoice Creation Setup.
	+ Note that the first setting allows you to determine whether the invoices that get created from Bigcommerce purchases are automatically placed on individual profiles, or related Member organization profiles.
* **Assign revenue items to products **In addition to default revenue items (set above), you can assign different revenue items to each of the individual products in your store. This might come in handy if you track revenue for manuals and downloads separately from revenue for apparel, for example. You only need to set revenue items on individual products if you do NOT want to use the default revenue item. This page is accessed in the web browser version of WebLink (accessible at weblinklogin.com), under Bigcommerce > Integration management.
* **Set up a special group for member pricing in Bigcommerce **Even if you don’t plan on doing special pricing for members initially, we recommend setting up a group specifically for members in Bigcommerce to maximize use of WebLink’s profile sync.
	+ In Bigcommerce, click on Customers > Customer Groups. Then click Create a Customer Group. You can add a name for the group and nothing more, or you can go ahead and set up your discount(s) in the Category, Product, or Storewide Discount sections.
* **Configure the profile sync process between WebLink and Bigcommerce **All of the individual profiles you have in WebLink can be automatically uploaded to Bigcommerce as customers. To determine which profiles you want to include and to which Bigcommerce groups they will be uploaded, in WebLink go to Admin > Set Preferences > Bigcommerce Settings.
	+ In the Profile Upload section, check the checkboxes to indicate whether you’d like member main contacts, all member employees, and/or non-member individuals to be uploaded to Bigcommerce.
	+ In the dropdowns, indicate to which Bigcommerce groups you would like both members and non-members to be uploaded.

Note that you do not need to manually sync your profiles to Bigcommerce, this process happens automatically once a day. You can “push” a profile sync manually in the browser version of WebLink, under Bigcommerce > Integration Management.

# **Manage your orders and invoices**

After you launch your store  and people start placing orders, you'll manage things primarily using the "Order Status" field in Bigcommerce – tracking order processing, fulfillment, etc. As you process these items in Bigcommerce, that data will flow into WebLink Connect, creating invoice and payment records automatically for each order processed.

* **Set your email notification preferences **In Bigcommerce, click on Setup & Tools and then choose Order Notifications under the “Customize your store” section. You can choose to receive text or email messages when an order comes in to your store.
* **Track and fulfill your orders **All of your orders can be seen by clicking Orders > View Orders in Bigcommerce. You’ll manage these orders primarily using the “Order Status” dropdown, which indicates when an order is awaiting confirmation, fulfillment, shipping, refund, etc. You can also edit orders, manually add orders, process returns, and more.
* **Manage order invoices in WebLink **Often, you will not need to do anything to the invoices that come in to WebLink from Bigcommerce purchases. As long as all of your settings are correct and your members are using an account when purchasing items for your store, the invoices will be created and placed on the correct profile with no involvement from you. If you do need to find or work with Bigcommerce invoices, you can view them from the web browser (weblinklogin.com), under Bigcommerce > Invoice Management.
	+ Search for orders using a date range or Bigcommerce order number, and manually import orders if necessary.
	+ Link invoices to the correct profile if an order was placed as a guest or as a customer that was not in your database.
	+ Easily create individual profiles from new customers that create an account when purchasing items from your store.