

Insight

by Konnectryx

Insight allows you to keep your Lightspeed R data synchronized in near real time with your Salesforce data.

Near real time

Insight operates in two different modes depending on the direction data is flowing.

1. Lightspeed R to Salesforce

Insight polls Lightspeed for any changes at a specified polling interval. You can have Insight check for changes as often as every five minutes!

2. Salesforce to Lightspeed R

Anytime an Account or Contact record is updated in Salesforce, that record will immediately be queued to send to Lightspeed. Records in the queue are sent as quickly as possible, but Insight is limited to the speed at which Lightspeed's API accepts record changes. If a large number of Salesforce records are updated it is possible you will encounter performance issues with Insight.

What data is synchronized?

Insight handles the following information. For specific field mappings, please see the following sections.

- Bidirectionally synchronized
 - Lightspeed Customers and Salesforce Accounts/Contacts
- Unidirectionally fetched
 - Lightspeed Sales and Quotes to Salesforce Opportunities/Orders.
 - Lightspeed Items to Salesforce Products/Pricebook Entries.
 - Lightspeed Employees to a package-defined Custom Object.
 - Lightspeed Registers to a package-defined Custom Object.
 - Lightspeed Shops to a package-defined Custom Object.

Customers

Nearly all¹ Lightspeed R's standard Customer fields are synchronized to Salesforce (see the table below for details) into either an Account or Contact record. This data, except as noted, is bidirectionally synchronized.

Lightspeed		Salesforce field(s)	
Section	Field Name	Default	Person Accounts ²
Biographical	First Name	Contact First Name (<i>Contact.FirstName</i>)	Account First Name (<i>Account.FirstName</i>)
	Last Name	Contact Last Name (<i>Contact.LastName</i>)	Account First Name (<i>Account.LastName</i>)
	Title	Contact Title (<i>Contact.Title</i>)	
	Company	Account Name (<i>Account.Name</i>)	(Does Not Sync)
	Birth Date	Contact Birthdate ³ (<i>Contact.Birthdate</i>)	
Phones	Home	Contact Home Phone (<i>Contact.HomePhone</i>)	Account Home Phone (<i>Account.PersonHomePhone</i>)
	Work	Contact Phone (<i>Contact.Phone</i>) Account Phone ⁴ (<i>Account.Phone</i>)	Account Phone (<i>Account.Phone</i>)
	Mobile	Contact Mobile (<i>Contact.MobilePhone</i>)	
	Pager	Contact Other Phone (<i>Contact.OtherPhone</i>)	
	Fax	Contact Fax (<i>Contact.Fax</i>) Account Fax ⁵ (<i>Account.Fax</i>)	

¹ Insight is not able to sync any of your Lightspeed R custom fields.

² If Person Accounts are enabled in your Salesforce org, Insight will use these fields in place of the default mapping. If nothing is specified, the Default field is used.

³ Due to an issue with Lightspeed's API, a blank/null Salesforce birth date will be sent to Lightspeed as 12/31/1899. The value will still be blank/null in Salesforce.

⁴ The Account Phone is only synced unidirectionally from Lightspeed to Salesforce.

⁵ The Account Fax is only synced unidirectionally from Lightspeed to Salesforce.

Customers continued

Lightspeed		Salesforce field(s)	
Section	Field Name	Default	Person Accounts ⁶
Address ^{7 8}	Country	Contact Mailing Address - Country (<i>Contact.MailingCountry</i>) Account Shipping Address - Country (<i>Account.ShippingCountry</i>)	
	Address	Contact Mailing Address - Street 1 (<i>Contact.MailingStreet[0]</i>) Account Shipping Address - Street 1 (<i>Account.ShippingStreet[0]</i>)	
	Address2	Contact Mailing Address - Street 2 (<i>Contact.MailingStreet[1]</i>) Account Shipping Address - Street 2 (<i>Account.ShippingStreet[1]</i>)	
	City	Contact Mailing Address - City (<i>Contact.MailingCity</i>) Account Shipping Address - City (<i>Account.ShippingCity</i>)	
	State	Contact Mailing Address - State (<i>Contact.MailingState</i>) Account Shipping Address - State (<i>Account.ShippingState</i>)	
	ZIP	Contact Mailing Address - Postal Code (<i>Contact.MailingPostalCode</i>) Account Shipping Address - Postal Code (<i>Account.ShippingPostalCode</i>)	

⁶ If Person Accounts are enabled in your Salesforce org, Insight will use these fields in place of the default mapping. If nothing is specified, the Default field is used.

⁷ The address information is bidirectionally synced between Lightspeed and Salesforce for the Salesforce Contact Mailing Address, but only unidirectionally synced from Lightspeed to Salesforce for the Account Shipping address.

⁸ Caution should be used if you have State and Country Picklists turned on in Salesforce. Because Lightspeed does not have a similar feature, if the data sent to Salesforce does not match the Salesforce picklist values, the data will not sync to Salesforce.

Customers continued

Lightspeed		Salesforce field(s)	
Section	Field Name	Default	Person Accounts ⁹
Other	Website	Account Website (<i>Account.Website</i>)	(Does Not Sync)
	Email 1	Contact Email (<i>Contact.Email</i>)	
	Email 2	Contact Email 2 ¹⁰ (<i>Contact.Email2__c</i>)	
	Custom	Contact Custom Contact Info (<i>Contact.trxLS__CustomContactInfo__c</i>)	
Contact	Email (consent)	Contact Email Opt Out (<i>Contact.HasOptedOutOfEmail</i>)	
	Mail (consent)	Contact Mail Opt Out (<i>Contact.trxLS__Mail_Opt_Out__c</i>)	
	Call (consent)	Contact Do Not Call (<i>Contact.DoNotCall</i>)	
Notes	Notes	Contact Lightspeed Note (<i>Contact.trxLS__CustomerNote__c</i>)	

⁹ If Person Accounts are enabled in your Salesforce org, Insight will use these fields in place of the default mapping. If nothing is specified, the Default field is used.

¹⁰ If a field with this API exists, then this data will sync, otherwise it will not.

Sales

Lightspeed sales are sent unidirectionally to Salesforce as both a Closed Won Opportunity and an Activated Order.

Lightspeed Sale Details

Lightspeed			
Category	Section	Field Name	Salesforce field(s)
Details	Basic	Date	Order Effective Date (<i>Order.EffectiveDate</i>)
	Customer	Customer	Opportunity Account (<i>Opportunity.AccountId</i>)
			Order Account (<i>Order.AccountId</i>)
			Order Bill to Contact (<i>Order.BillToContactId</i>)
			Order Customer Authorized By (<i>Order.CustomerAuthorizedId</i>)
	Location	Sale Employee	Opportunity Employee (<i>Opportunity.trxLS__Lightspeed_Employee__c</i>)
			Order Employee (<i>Order.trxLS__Lightspeed_Employee__c</i>)
		Register	Opportunity Register (<i>Opportunity.trxLS__Register__c</i>)
		Order Register (<i>Order.trxLS__Register__c</i>)	
	Notes	Receipt Note	Opportunity Shop Location (<i>Opportunity.trxLS__Shop__c</i>)
Order Shop Location (<i>Order.trxLS__Shop__c</i>)			
	Internal Note	Order Description (<i>Order.Description[0]</i>)	
		Order Description (<i>Order.Description[1]</i>)	
None	Reference Number	Order Reference Number (<i>Order.ReferenceNumber</i>)	

Lightspeed Sale Lines

Lightspeed		
Category	Field Name	Salesforce field(s)
Lines	Item (Description)	Order Item Description (<i>OrderItem.Description</i>)
	Item (SKU)	Order Item SKU (<i>OrderItem.Product2Id</i>) Order Item Pricebook Entry (<i>OrderItem.PricebookEntryId</i>)
	Quantity	Order Item Quantity (<i>OrderItem.Quantity</i>)

Lightspeed Sale Shipping

Lightspeed			
Category	Section	Field Name	Salesforce field(s)
Shipping	ShipTo	Customer	Order Ship To Contact (<i>Order.ShipToContactId</i>)
		Country	Order Shipping Address - Country (<i>Order.ShippingCountry</i>)
		Address	Order Shipping Address - Street (<i>Order.ShippingStreet[0]</i>)
		Address 2	Order Shipping Address - Street 2 (<i>Order.ShippingStreet[1]</i>)
		City	Order Shipping Address - City (<i>Order.ShippingCity</i>)
		State	Order Shipping Address - State (<i>Order.ShippingState</i>)
		ZIP	Order Shipping Address - Postal Code (<i>Order.PostalCode</i>)

Products

The products from Lightspeed are synced unidirectionally into Salesforce and create a Pricebook entry in your Standard Pricebook.

Lightspeed		
Section	Field Name	Salesforce field(s)
	Description	Product Name (<i>Product2.Name</i>) Product Description (<i>Product2.Description</i>)
IDs	System ID	Product Product Code (<i>Product2.ProductCode</i>)
	Manufact. SKU	Product Stock Keeping Unit (<i>Product2.StockKeepingUnit</i>)
Organize	Category	Product Product Category (<i>Product2.trxLS__LightspeedCategory__c</i>)
	Brand	Product Manufacturer (<i>Product2.trxLS__LightspeedManufacturer__c</i>)
Pricing	Default	Pricebook Unit Price (<i>PriceBookEntry.UnitPrice</i>)

Miscellaneous info

Employees

Lightspeed Field Name	Salesforce field(s)
First Name	Lightspeed Employee First Name (<i>trxLS__Lightspeed_Employee__c.trxLS__First_Name__c</i>)
Last Name	Lightspeed Employee Last Name (<i>trxLS__Lightspeed_Employee__c.trxLS__Last_Name__c</i>)

Locations

Lightspeed			
Category	Section	Field Name	Salesforce field(s)
Location Settings	Details	Name	Shop Name (<i>trxLS__Shop__c.Name</i>)
		Time Zone	Shop TimeZone (<i>trxLS__Shop__c.trxLS__TimeZone__c</i>)
Location Registers	Registers	Name	Register Name (<i>trxLS__Register__c.Name</i>)
		Shop	Register Shop Location (<i>trxLS__Register__c.trxLS__Shop__c</i>)