



# How a luxury retail company automated POS sales sync from LightSpeed to Salesforce

## Executive snapshot

A luxury retail business with multiple boutique stores used LightSpeed R Series POS for in-store sales and Salesforce for customer records. None of the sales data flowed into Salesforce. Their team exported POS data by hand, fixed CSV files, and uploaded everything manually. This created slow updates, inconsistent customer profiles, and extra work for sales, service, and marketing teams.

RevSolutions built an automated API integration that pulls new sales from LightSpeed every ten minutes and sends them into Salesforce. Each transaction links to the right Person Account with full detail. The team now sees accurate customer activity, faster after sales workflows, and a reliable view of purchase history.

## About the client

The client is a high end jewellery retailer with boutique stores. They focus on premium in store service, strong customer relationships, and long term client care. Their teams depend on accurate sales data in Salesforce to handle after sales service, loyalty programs, and customer engagement.

## The challenge

The client relied on LightSpeed R Series POS for sales, but the system could not push data to Salesforce. LightSpeed does not support outbound webhooks, so real time sync was not possible.

The team handled sales sync manually, which caused:

- incomplete customer profiles
- slow CSV exports and imports
- errors from inconsistent data
- delays in after sales service
- limited visibility into customer activity

Growing transaction volume made manual work unsustainable.



## Why RevSolutions joined the project

The client looked for a partner who could design API based communication between LightSpeed and Salesforce. They chose RevSolutions for their experience with:

- Salesforce integrations
- retail data models
- Person Accounts
- LightSpeed API design

The goals were clear.

Automate POS to Salesforce sync, remove manual work, match transactions to Person Accounts, and create near real time visibility for sales and service teams.

## The solution and implementation

RevSolutions used LightSpeed Retail POS APIs and Salesforce Apex batch processing to build a stable, polling based integration.

### Discovery and architecture

The team reviewed the LightSpeed API, mapped data models, and defined a polling approach since webhooks were not available.

### API integration setup

RevSolutions built:

- Named Credentials for secure OAuth
- API services to fetch sales and line items
- incremental sync logic using timestamps and IDs

### Scheduled Apex job every ten minutes

The team created:

- a Scheduler that runs every ten minutes
- Batch Apex that fetches new and updated sales
- checkpointing to prevent duplicates
- logging to track success and failures.

### Salesforce data modeling

RevSolutions set up:

- Person Accounts for customer records
- a custom Sales Transaction object
- a Line Item object for products and quantities

Mapping covered:

- customer lookup using email or phone
- transaction totals, items, and payment details
- each SKU, category, price, and quantity



### Testing and go live

The team ran unit tests, UAT with historical and new data, and trained operations before a staged rollout.

### Key hurdle and resolution

Hurdle: LightSpeed R Series does not support event notifications.

Resolution: RevSolutions designed a polling engine using Scheduler and Batch Apex that runs every ten minutes.

## Results and impact

The client gained a stable, automated flow of POS data into Salesforce. Their team no longer manages exports or imports.

### Quantitative results

- **100%** automation of POS to Salesforce sync, updates every ten minutes
- **80%** drop in manual reconciliation
- **90%** improvement in customer profile accuracy
- **30-40%** faster after sales workflows

### Qualitative improvements

- Complete customer profiles with purchase history
- Better targeting for loyalty and CRM campaigns
- Stronger visibility for sales and service teams
- Smoother customer experience
- Better reporting and store insights

### Before and after

- **Before:** manual exports, incomplete profiles, data delays, inconsistent reporting.
- **After:** automated sync, complete history, faster follow ups, real time dashboards.

## Highlights and next steps

This project stood out because the team delivered near real time sync without webhook support. The solution stayed lightweight, stable, and ready for scale.

### Next steps:

- Automated loyalty programs
- Marketing segmentation using Person Accounts
- E-commerce integrations
- Advanced dashboards for store performance