


Shopify Integration Process Instructions

Customer: Grovtec

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Step 1: Shopify Maintenance

1. The user will need to set up the Shopify credentials via: Order Entry > Administration > Shopify API Maintenance (6597)
2. In this screen, the user will be able to do the following:
 - a. Enter the API Key
 - b. Enter the API Password
 - c. Set the 'Order Since Date' which determines the start date for pulling orders
 - i. E.g., If the date is set to 1/28/2022, the API call will pull all orders created on or after 1/28/2022
 - d. Set Email Recipients for the emails that are generated when new orders have been processed
 - e. Enter the Shopify Version
 - f. Reset the Inventory Association List
 - i. ***NOTE: This button will clear out the table that holds every Web ID/GSS Part association and rebuild the data – do not click unless absolutely necessary


Shopify Integration Maintenance (PLA)
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Set the Global Shop API Credentials

API Key **Get**

API Pass **Set**

Order Since Date

1/28/2022 ▼

Set

Set Email Recipients

Email **Save**

Name **Delete**

	EMAIL	RECIPIENT

Shopify Version

Get

Set

Reset Inventory Association List

3. To setup the API Credentials for the Shopify Global Shop Private app, the user will need to enter the API Key and API Password from Shopify. Once the user has copied the API Key and API password into their corresponding textboxes, they will need to click 'Set' to save the information to the custom table.
 - a. ***NOTE: Both the API Key and API Password are encrypted in the custom table for security purposes
4. If at any point the API Credentials change for the Shopify Global Shop Private App, the user will need to come into this screen, click 'Get' in the API Credentials section and update the information using the same process mentioned above.

G Shopify Integration Maintenance (PLA)
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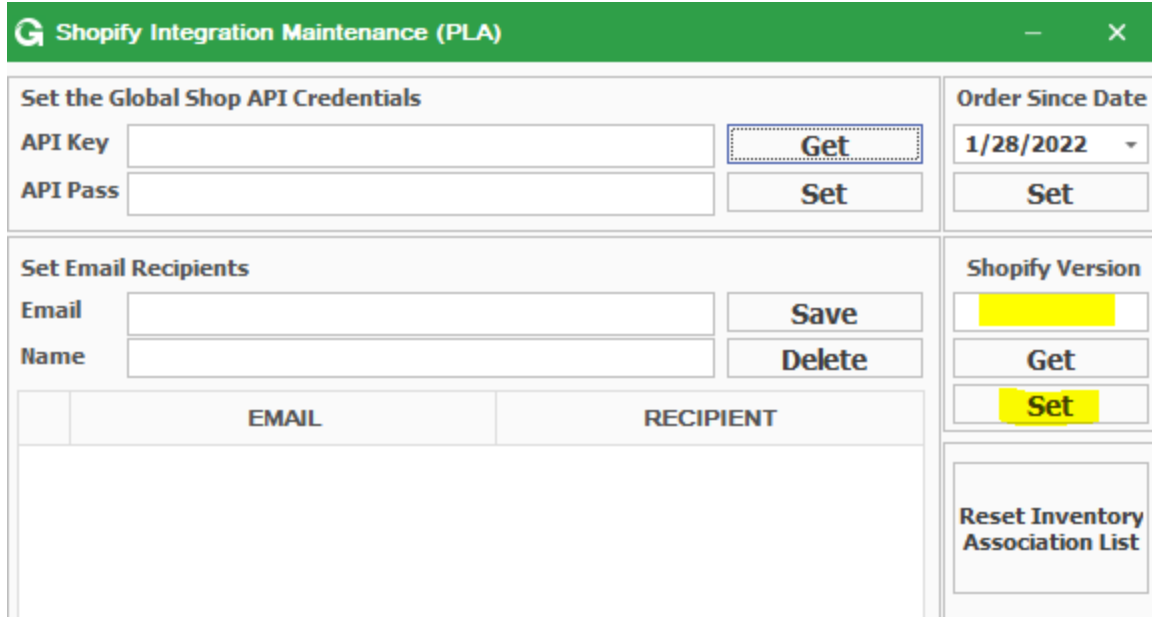
Set the Global Shop API Credentials		Order Since Date						
API Key	<input type="text"/>	1/28/2022 ▾						
API Pass	<input type="text"/>	Set						
Set Email Recipients		Shopify Version						
Email	<input type="text"/>	<input type="text"/>						
Name	<input type="text"/>	Get						
		Set						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;"></th> <th style="width: 30%;">EMAIL</th> <th style="width: 30%;">RECIPIENT</th> </tr> </thead> <tbody> <tr><td colspan="3" style="height: 100px;"></td></tr> </tbody> </table>			EMAIL	RECIPIENT				<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Reset Inventory Association List</div>
	EMAIL	RECIPIENT						

5. The user will need to set the 'Order Since Date' by selecting a date from the date picker and clicking 'Set.'
 - a. ***NOTE: If you pick a date from 6 months ago, the process will take longer due to the increased number of Orders coming into Global Shop

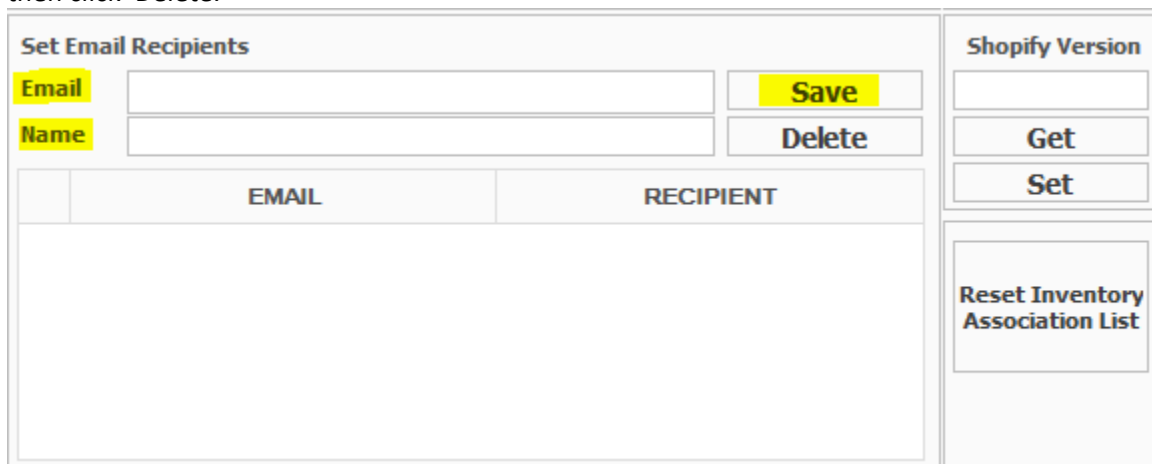
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Set the Global Shop API Credentials		Order Since Date
API Key	<input type="text"/>	1/28/2022 ▾
API Pass	<input type="text"/>	Set

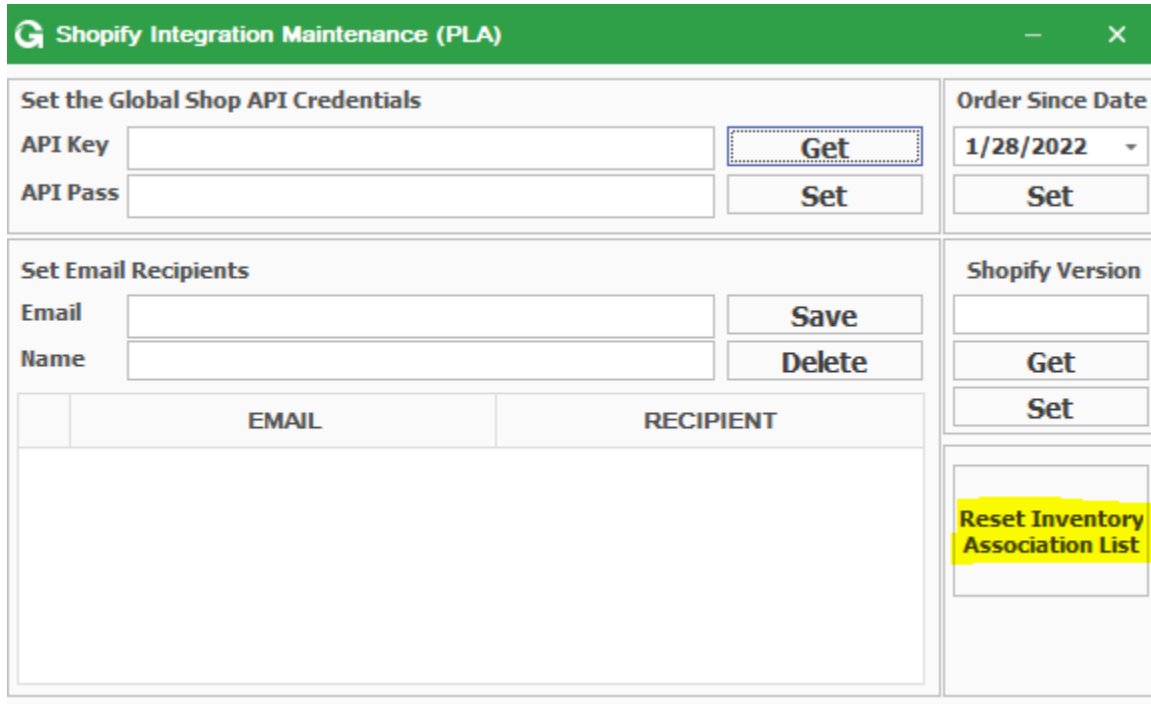
6. If the Shopify Version hasn't been entered yet, the user will need to enter the same version of Shopify that the storefront is currently running on. The user will need to type the version in the box (e.g., 2021-01) and click 'Set.'
7. If the version changes at any point, the user can click the 'Get' button to populate the version that was previously entered and update it using the same steps mentioned above.



8. The user will also need to setup Recipients within the organization that will receive emails when new orders are processed.
9. The user can do this by entering the Recipient's Email and Name in the corresponding textboxes and then clicking 'Save.' The users that have been added as Recipients will appear in the grid below.
10. If a Recipient needs to be removed later, the user can double click the Recipient in the grid and then click 'Delete.'



11. If at any time, the Inventory Association List needs to be cleared, the user can do this by clicking 'Reset Inventory Association List.' The process will delete all inventory associations from the custom table and rebuild the Web ID/Global Shop Part association.
 - a. ***NOTE: It is recommended to do this during initial project setup to pull all Shopify Web IDs and associate them with the correct Global Shop Part Numbers
 - b. ***NOTE: After initial setup, the process will take quite some time and should be done after hours if absolutely necessary



Step 2: Inventory Association

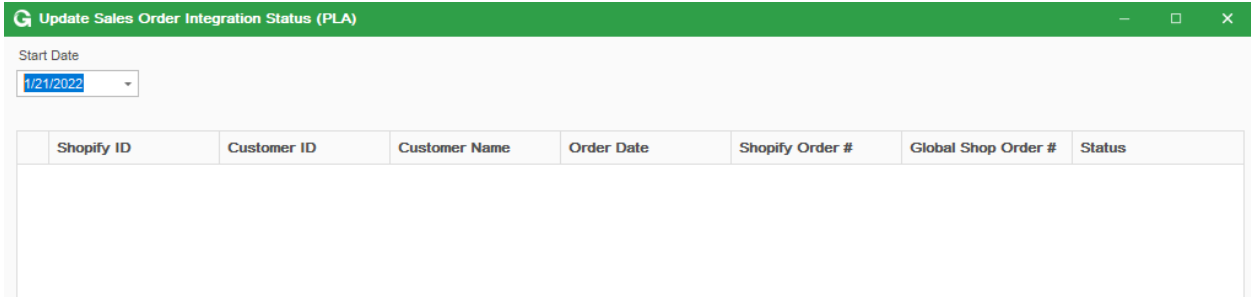
1. After the user sets up the API Credentials, the Order Since Date, Email Recipients and Shopify version, they will need to setup the Inventory Associations.
2. The user can setup the Inventory Associations via the 'Reset Inventory Association List' button in Order Entry > Administration > Shopify API Maintenance (6597).
3. The process will pull all Shopify Web IDs for each SKU and associate the WEB ID with the part in Global Shop. The Part in Global Shop will match the SKU from Shopify.
 - a. For example, SKU GTSW01 has a Web ID of 44360345044. The part will exist in Global Shop Inventory as GTSW01

Step 3: Pull Orders from Shopify into Global Shop

1. If the user needs to manually pull Orders from Shopify, they can do so via: Order Entry > File > Pull Shopify Orders (6597). Otherwise, the Shopify Orders will be pulled into Global Shop every hour via Online Update.
2. The script will do the following:
 - a. Import New Orders from Shopify
 - b. Create New Customers in Global Shop if they don't already exist
 - c. Create New Sales Orders in Global Shop
 - i. The 'Customer PO' Field on the Order Header will be populated with the Shopify Order Number_Customer Last Name
 - d. Email Recipients when New Orders have been Processed
 - e. Void Order in Global Shop, if voided in Shopify
 - f. Capture Payment Status in Shopify and store/update on Order Header user-defined-field in Global Shop

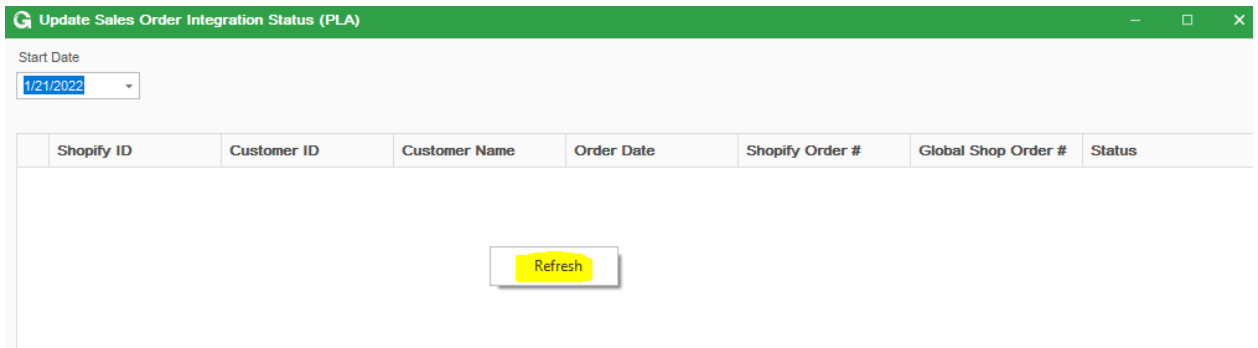
Step 4: Update Shopify Integration Status

1. If the user needs to change the status of an order to 'Fulfilled', they can do so via: Order Entry > File > Update Shopify Integration Status (6597).



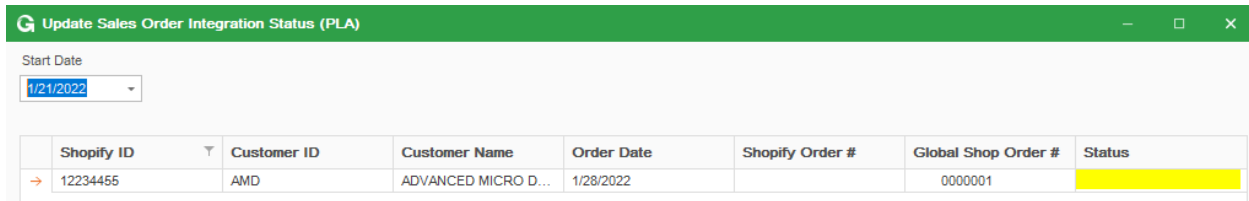
Shopify ID	Customer ID	Customer Name	Order Date	Shopify Order #	Global Shop Order #	Status
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2. The user can change the Start Date if they need to load orders from a previous date. Once the user changes the date in the 'Start Date' date picker, they will need to right-click and select 'Refresh' from the context menu.

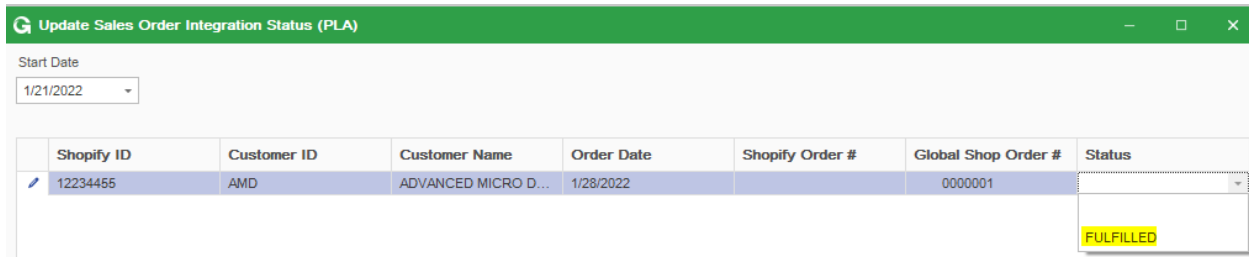


Shopify ID	Customer ID	Customer Name	Order Date	Shopify Order #	Global Shop Order #	Status
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3. After the dashboard loads with the orders from on or after the selected Start Date, the user will be able to set the status by selecting 'Fulfilled' from the drop down in the 'Status' column.



Shopify ID	Customer ID	Customer Name	Order Date	Shopify Order #	Global Shop Order #	Status
12234455	AMD	ADVANCED MICRO D...	1/28/2022		0000001	



Shopify ID	Customer ID	Customer Name	Order Date	Shopify Order #	Global Shop Order #	Status
12234455	AMD	ADVANCED MICRO D...	1/28/2022		0000001	<div> FULFILLED </div>

Step 5: Inventory Level Reconciliation

1. If the user needs to manually update the quantity on hand in Shopify, they can do so via:
Inventory > Administration > Shopify Inventory Reconciliation (6597). Otherwise, the Inventory Reconciliation will be done once daily via Online Update.
2. The process will push the Net Quantity on Hand to the SKU in Shopify.
 - a. The calculation for Net Quantity on Hand is:
 $(Qty\ On\ Hand) - (Qty\ Required)$
3. The process uses the Inventory Association table to pull the Web ID for the SKU based on the Part number in Global Shop. The process will push the inventory level into location ID 45161428
 - a. ***NOTE: If this location ID needs to change at any point, please let me know.