XCHANGE

Shopify Plugin Outline

Installation

You will need an admin account for your Shopify store as well as your XCHANGE Reseller ID and password.

1. Go to https://xchangeb2b.com/XCH/Reseller/Shopify/facade/install.php and fill in your XCHANGE credentials

2. The install page will redirect you to your Shopify settings and ask to install **XMP31**

⚠ **This app isn't listed on the App Store**
XMP31 doesn't appear on the Shopify App Store. Make sure you trust this developer before you install their app.

You are about to install XMP31

XCHANGE Demo   XMP31

XMP31 will be able to:

View Shopify account data	View details
Manage products	View details
Manage orders	View details
Manage customers	View details
Manage your Online Store	View details

To erase your customers' personal information from XMP31, uninstall the app. After 48 hours, a request will be sent to XMP31 to erase this data. Learn more about data privacy.

Cancel   Install unlisted app

3. You can review the permissions the plugin requires, and then click on **<u>Install unlisted app</u>**

4. You will be redirected to a login page where you can enter your Reseller ID and password

5. After logging in, fill out all of the fields in the **<u>Configure</u>** page

   i. Set "Production MODE Active?" to No

   ii. Clear the "Production URL" field

6. We will be storing your shop's **OAuth Token** in our database, and your reseller information including credit card into your Shopify's metafields. Please review the **Information Stored** section at the bottom of this document for information on everything we store and access.

Store Configuration

To display XCHANGE license information in customer emails and order status pages, please modify the following Shopify templates. To do this, login to your Shopify admin panel.

Order Status Page

From the **Settings** page, click on **Checkout** and scroll down to the **Order processing** section. Inside the **Additional scripts** field, paste the following:

```
{% if order.metafields.xchrealm.xchange_reserveferr %}
{% assign xchrealm = order.metafields.xchrealm %}
{% assign key = 'xchange_reserveferr' %}
<br><ul><li><b style='color: red;'>{{ xchrealm.xchange_reserveferr }}</b></li></ul>
{% endif %}
{% if order.metafields.xchrealm.xchange_emailerrmsg %}
{% assign xchrealm = order.metafields.xchrealm %}
{% assign key = 'xchange_emailerrmsg' %}
<br><ul><li><b style='color: red;'>{{ xchrealm.xchange_emailerrmsg }}</b></li></ul>
{% endif %}
{% if order.metafields.xchrealm.xchange_license_info %}
{% assign xchrealm = order.metafields.xchrealm %}
{% assign key = 'xchange_license_info' %}
<br><ul><li><b style='color: red;'>{{ xchrealm.xchange_license_info }}</b></li></ul>
{% endif %}
```

Click on **Save** at the bottom of the page.

Order Page

From the **Settings** page, click on **Sales Channels** and then **Online Store**. Under the **Actions** drop-down click on **Edit code**. Click on the **customers/order.liquid** Template in the left sidebar. Paste the following code into the template where you'd like the license information to appear:

```
<!--- Reveal XCHANGE License Info --->
{% if order.metafields.xchrealm.xchange_license_info %}
{% assign xchrealm = order.metafields.xchrealm %}
{% assign key = 'xchange_license_info' %}
<br><ul style="background: aliceblue; padding: 50px;"><li><p style='color: red;'>{{ xchrealm.xchange_license_info }}</p></li></ul>
{% endif %}
<!--- --→
```

Click on **Save** near the top right of the page.

Shipping Confirmation Email

From the **Settings** page, click on **Notifications**. Under the **Shipping** section click on **Shipping confirmation**. Search for **Items in this shipment** in the **Email body (HTML)** field (Ctrl+F). Paste the following code before the **<table class="row section">**

```
<div>
    {% for order in customer.orders %}
        {% if id == order.id %}
            {% if order.metafields.xchrealm.xchange_license_info %}
                {% assign xchrealm = order.metafields.xchrealm %}
                {% assign key = 'xchange_license_info' %}
                <p>{{ xchrealm.xchange_license_info }}</p>
            {% endif %}
        {% endif %}
    {% endfor %}
</div>
```

In the diagram below, the highlighted box is where the code should be pasted.

```
              </tr>
            </table>
          </center>
        </td>
      </tr>
    </table>
          ┌─────────────────────────┐          ⬅
          └─────────────────────────┘
              <table class="row section">
        <tr>
          <td class="section__cell">
            <center>
              <table class="container">
                <tr>
                  <td>
                    <h3>Items in this shipment</h3>
                  </td>
                </tr>
              </table>
              <table class="container">
                <tr>
                  <td>
```
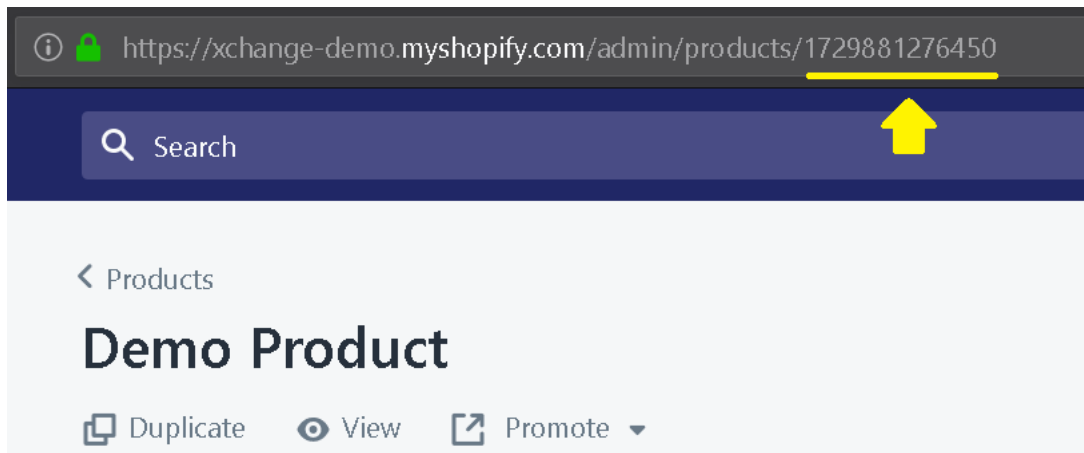
Click on **Save** at the bottom of the page.

Setting up Shopify Products with XCHANGE

To create a new XCHANGE product in your store, go to the **Products** tab in the main Shopify page and click on **Add Product**.

1. Fill out the **Title**, **Description**, **Price** and **SKU** as you normally would

2. Scroll down to the **Inventory** section and set the **Inventory Policy** to **Don't track inventory**

3. Uncheck the **This is a physical product** checkbox in the **Shipping** section

4. Do not add any **Variants**

5. Select **XCHANGE** in the **Fulfillment Service** drop-down

6. Click save, and then copy the product id from the URL. It is the long number at the end of the link:

7. Go to https://xchangeb2b.com/XCH/Reseller/Shopify/facade/login.html and enter your reseller credentials

8. Click on the **Link Product** tab. Paste the product id you copied from **Step 6** in the **Shopify Product ID** field. Put the XCHANGE SKU of the product in the next field, and click **Link Product**

Testing your store

Before you start selling real products on your store, create some test products and transactions to make sure everything is working properly.

1. Create a new test product by following the **Setting up Shopify Products with XCHANGE** section. In **Step 8** use 1014-46 as the XCHANGE SKU

2. Go to your storefront and login as a test customer

3. Click on Catalog and find the product you created in **Step 1**

4. Fill out the customer information using your email

5. Select **Money Order** as the payment method and click **Complete Order**. You will receive a standard confirmation email for your order. If you don't see **Money Order** as an option:

   i. From the **Settings** page in your Shopify Admin panel, click on **Payment providers**

   ii. Under **Manual payments** select **Money Order** in the dropdown, then click **Activate**

   iii. **NOTE:** If you do not want to support money orders for your customers, please remember to remove this option after you finish testing

6. Go to your Shopify Admin panel and click on your order in the **Orders** tab

7. Click on **Mark as paid**. You will receive a second email that contains the XCHANGE license information for your order. You can also see this if you refresh the customer's order status page

Launching your store

Please contact us before you run your tests so we can make sure your account is activated. We will monitor your first few transactions to make sure everything is working from our end. Once we confirm that your integration works we will switch you over from the **Sandbox/Testing API** to the **Production API**, so that you can start selling real products from XCHANGE vendors.

IMPORTANT: Since you start with the **Sandbox API** you will **not** be able to sell real XCHANGE products until we switch you over.

Troubleshooting

You can visit https://xchangeb2b.com/XCH/Reseller/Shopify/facade/viewlog.php to view the logs of your store and see any warnings or errors and the times they occurred. Your Shopify Admin will be emailed whenever a critical error occurs.

Stored Information

We store your reseller credentials, XCHANGE Config settings, and reseller credit card information in your Shopify Store's metafields. We do not alter your Store or use your account data for any other purposes without your consent.

We require the following Shopify API Access Scopes to be granted:

read_orders, write_orders, read_products, write_products, read_customers, write_customers, read_checkouts, write_checkouts, read_fulfillments, write_fulfillments

We modify each order made in your store to add XCHANGE licenses and transaction ids. The transaction id is stored in the Order metafields with namespace 'xchrealm' and key 'xchange_tx'. License information is stored in the key 'xchange_license_info'.

We modify any products you associate with XCHANGE to store the XCHANGE SKU in the product metafields.

We store your Shop Domain (website address) and your Shopify Oauth Token in our private database, in order to allow the plugin to interact with your Store and our XCHANGE servers.

We create three webhooks for your Shopify store: orders/create, orders/paid and fulfillments/create. They will be called once each time an order is created, payment is received, and when Shopify requests an order to be fulfilled or processed by XCHANGE.