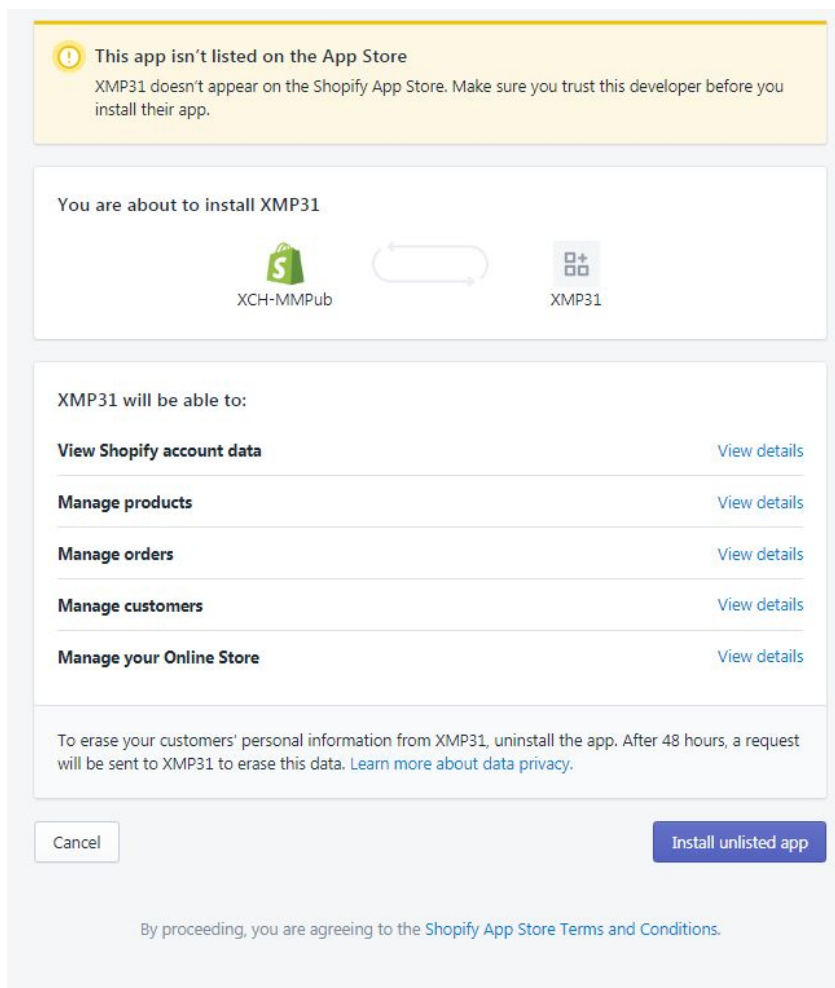# XCHANGE

XCHANGE MARKET CORP. Shopify INTEGRATION JANUARY 17, 2019

XCHANGE Shopify Integration Outline

XCHANGE Shopify App Installation Instructions and Technical Details

Installing the Shopify XCHANGE App and Getting Setup!

- Before you begin, take note that you must have a Shopify store account with Admin access and privileges.
- Please visit https://shopifyxmp31.a2hosted.com/index.php/installxchange to install the Shopify XCHANGE App on your shop. You will need to put in your Shop domain along with your XCHANGE Reseller ID and Reseller PW to initiate the setup process.
- Once you click the Install button, you will redirected to your Shopify store and will be asked to allow XCHANGE to view and manage certain aspects of your shop in order to successfully integrate XCHANGE with your Shopify store.

Please find attached capture.

XCHANGE

- We will be storing your reseller Info, XCHANGE Config Settings, credit-card Info, and other preferences into your Shop resource as Metafields. We do not alter in any way your Online Store or use your account data for any other purposes without your consent. Following are the API access scopes that we will need you to grant us access to in order to make Integration work:
  read_orders,write_orders,read_products,write_products,read_customers,write_customers,read_checkouts,write_checkouts
  - ❏ We will be managing your Order by adding on Metafields to store the XCHANGE txID, License Info and store any relevant Messages that the end-consumer needs to see. We will also be calling the Order Cancel API to cancel the Order upon any XCHANGE Error.
    The txID will be stored in the Order Metafield with 'xchrealm' namespace with 'xchange_tx' key, which is generated upon XCHANGE Reservation call. This txID is then used in the XCHANGE Finalize call made after Customer payment is successfully completed. Finalize returns the Product Licensing Info for any XCHANGE products that were in the Order and stores it in the 'xchange_license_info' key in the 'xchrealm' namespace.
    The License Info is sent to the Customer in an XCHANGE Sales email as well as appearing on the Customer's View Order page.
  - ❏ We will be managing your Products by adding on Metafields to store the XCHANGE sku when you associate your XCHANGE product with your Shopify Product.
- Upon successful install, your Shop Domain and OAuth Token will get stored in our DB in order to connect to your store via Shopify API when we need to meet the end-consumer Shopping Cart Flow.
- Now, please go to http://shopifyxmp31.a2hosted.com/index.php/login/ and login using your reseller ID and PW. You will be redirected to the XCHANGE Config page where you can put in your XCHANGE reseller Info. Here, you can set your reseller credentials, connection to XCHANGE Sandbox V. Production API, PO prefix, Admin email, CC Info, and other preferences. More implementation on the way.

XCHANGE

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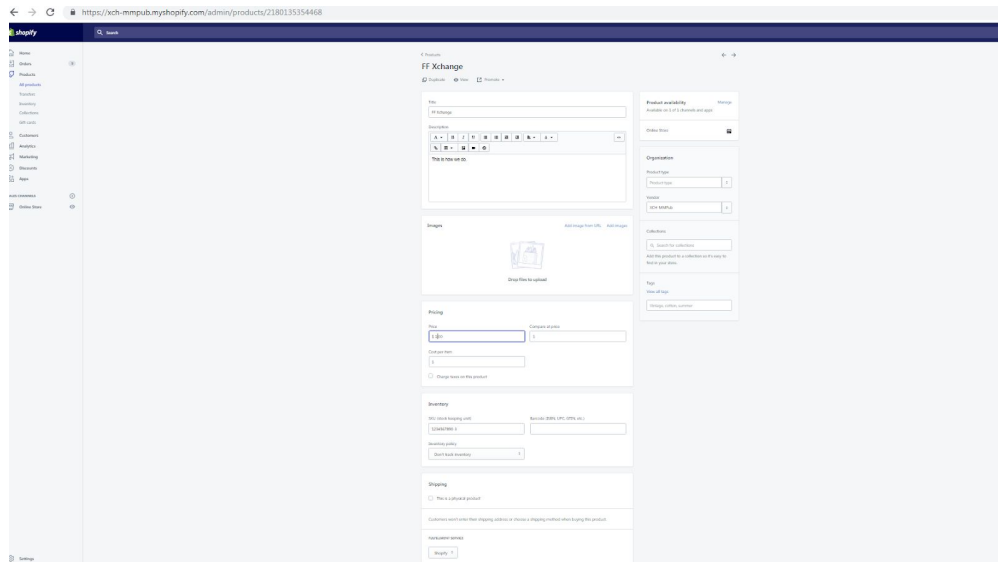

Please find attached capture.

- Initially, when you are doing testing and getting setup, you would want the XCHANGE Config | 'Production MODE Active?' set to 'No' in order to make calls to our Sandbox API. Production URL is left blank and will be given to you upon successful completion of testing and when you want to go live. After testing, you can change the XCHANGE Config | 'Production MODE Active?' to 'Yes' to go live.

Setting up your XCHANGE Products...

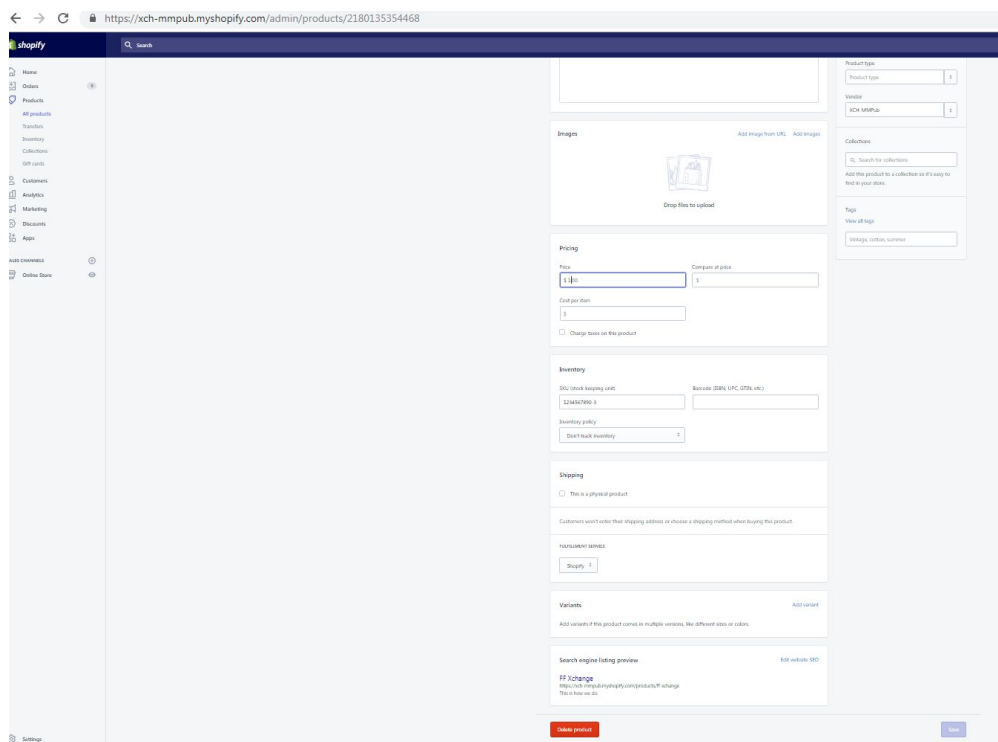- Please go to your Shopify Admin and Add product. Please set and do the following:
    - ❖ Set Title
    - ❖ Set Description
    - ❖ Set the Price
    - ❖ SKU of your choice
    - ❖ Set 'Inventory policy' to 'Don't track inventory'
    - ❖ For the Shipping option, turn off 'This is a physical product'
    - ❖ Do not add any Variants

- Please find example captures below for setting up a Shopify product.

Please find attached capture.

Please find attached capture.

- Take note of the ID of the newly created product:
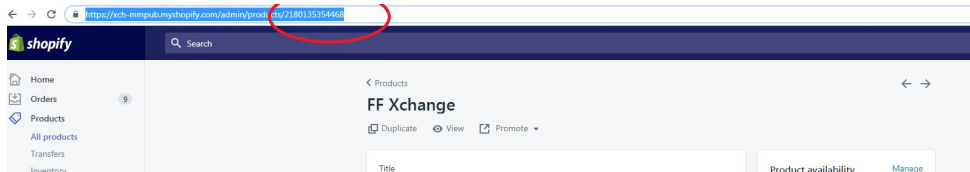
Please find attached capture.

- Once you have the product ID, please Login to
  http://shopifyxmp31.a2hosted.com/index.php/login/ and go to the 'Product Setup'
  tab(http://shopifyxmp31.a2hosted.com/index.php/setupxchangeprod)
- Please put in your Shopify Product ID and the XCHANGE sku and click 'Associate' in
  order to make the XCHANGE association to your Shopify product.
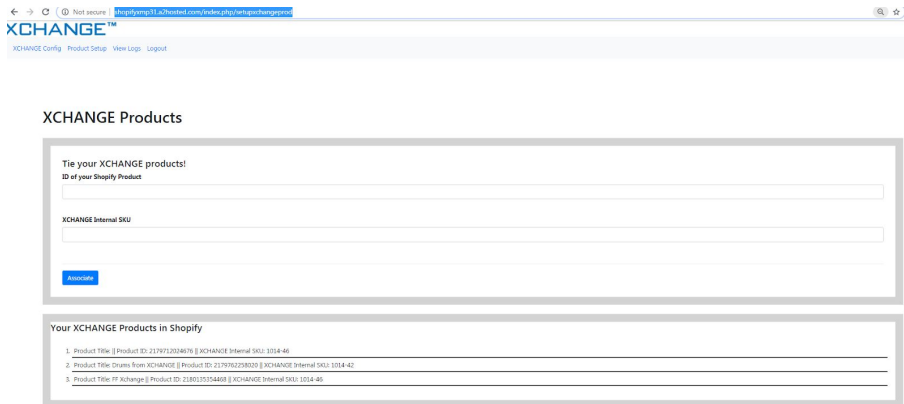
Please find attached capture.

Shopify Admin Panel | Template Modifications and Other XCHANGE Implementations

- In order to display License Info text and other relevant messages to the end-consumer,
  you must make some changes in your Admin Panel.
- We will be delivering the XCHANGE License via Order Status page, Order Details page,
  and by email.
- To update the Order Status page, please go to **Settings** | **Checkout**. Go to the **Order
  processing** section, and put in the following code in the **Additional scripts** box.

```
===========
{% 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 %}
===========
```

- Please go to **SALES CHANNELS** | **Online Store** | **Current theme** | **Actions** | **Edit code**. Click on **customers/order.liquid** under **Template**. Add in the following chunk of code where you want the XCHANGE License Info to be displayed.

```
===========
<!--- 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 %}
<!--- --->
===========
```

Sandbox Test

- Please setup an XCHANGE product as described above with 1014-46 XCHANGE sku. Put in any price when you Add product via Shopify.
- Go to your storefront and Login with a Test Customer Account. Go to Catalog and identify your XCHANGE Shopify product.

- Hit **checkout**. Fill in the necessary Customer Info, and click **Continue to payment method**. Select **Money Order** as **Payment method** and **Complete order**.
- You should now be redirected to the Order Status page and a Confirmation Email should have been sent to the email associated with your Test Customer Account.
- Now, go to your Shopify Admin Panel and go to Orders and select the Order you just placed. Click **Mark as paid**.
- Now, go to your storefront and login with your Test Customer Account if you are not. Go to **My Account**. You should see a list of all your Shopify orders associated with your Test Customer.
- Click on the Order you just completed. You should now see the XCHANGE Product License Info at the bottom section of your Order.

  Please find attached captures(Shopping Cart Flow - Page 1-10).

Logs

- Please go to http://shopifyxmp31.a2hosted.com/index.php/viewxchlogs/ in order to view all plugin errors and activity.

Conclusion

Please contact us before you run your Sandbox test, so we can make sure your account is activated for the Sandbox and closely monitor your first few test transactions. After we see that working, we'll give you the go ahead to switch over to the Production API and start setting up and selling real products from XCHANGE Vendors found on the http://xchangemarket.net site.