4.5.13. How to Import Data from Shopify

In this article we describe:

- correspondence between key terms in Shopify and Streamline,
- integration limitations,
- imported data,
- credentials, required to import data,
- data import workflow.

Key Terms

The key entities which Shopify operates on are *products*, *product variants* (variants), *locations*, and *sales channels*. Streamline treats products as item categories, variants as items, variant name as item description, locations as locations, and sales channels as channels.

Integration Limitations

There are several integration limitations between Streamline and Shopify due to the limitations of the Shopify API. These are:

- *The integration is one-directional*. It means that Streamline pulls all available data from Shopify, however, it can't push recommended POs back.

- *No on-hand history is available*. It means that Streamline is not able to:
  - calculate the inventory turnover,
  - compute the number of days in the period you had run out of inventory (Stockout days), and
  - automatically determine whether lost sales are caused by a stock-out or zero demand.

- *The delivery date for incoming POs is unknown*. In this case, Streamline will treat that as if the orders have already been received, and adds the **Qty to receive** to the **Last on hand** when calculating a purchase/replenishment plan.

- *No orders-to-ship are available*. This information would allow Streamline to calculate the purchase/replenishment plan and expected stockouts more accurately.

Imported data

Data imported into Streamline is described in the Inventory Management Systems article.

Credentials Required to Import Your Data

To import data from Shopify, Streamline needs to get access to your data based on authorization credentials: *API key* and *API access token*. To get those, a custom app should be registered within your Shopify store. To do this:

1.Go to your store, click on the arrow near the **Apps** section, and then click on the **App and sales channel setting** link in the appeared window (see figure below).
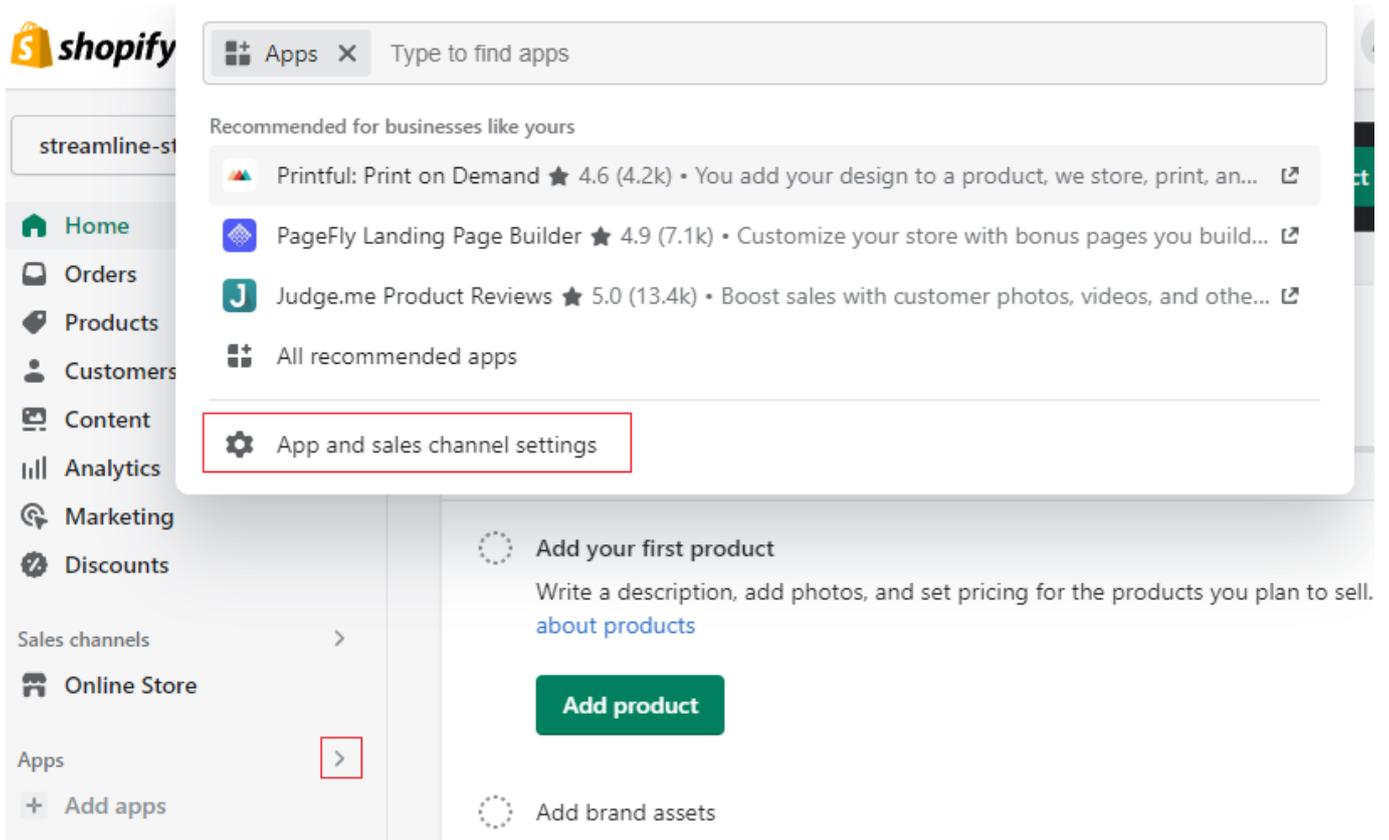
2. Click on the **Develop apps** button (see figure below).
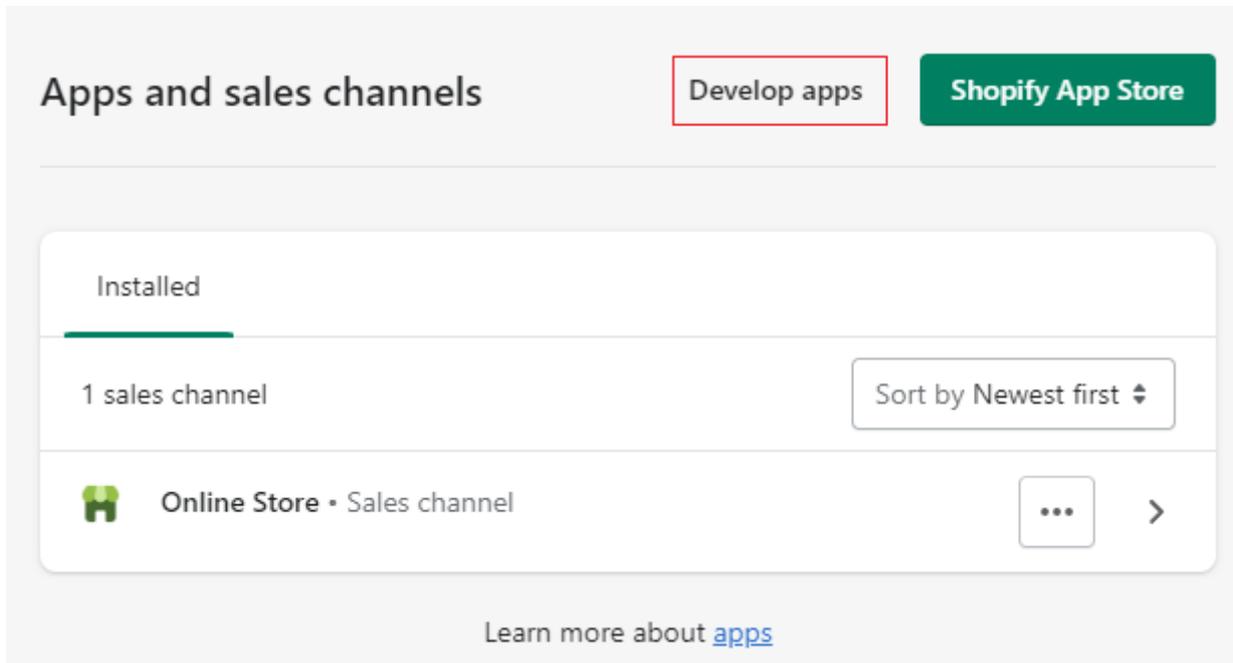
3. Click on **Allow custom app development** (see figure below).

4. Click it the second time (see figure below).

5. Click the **Create an app** button (see figure below).
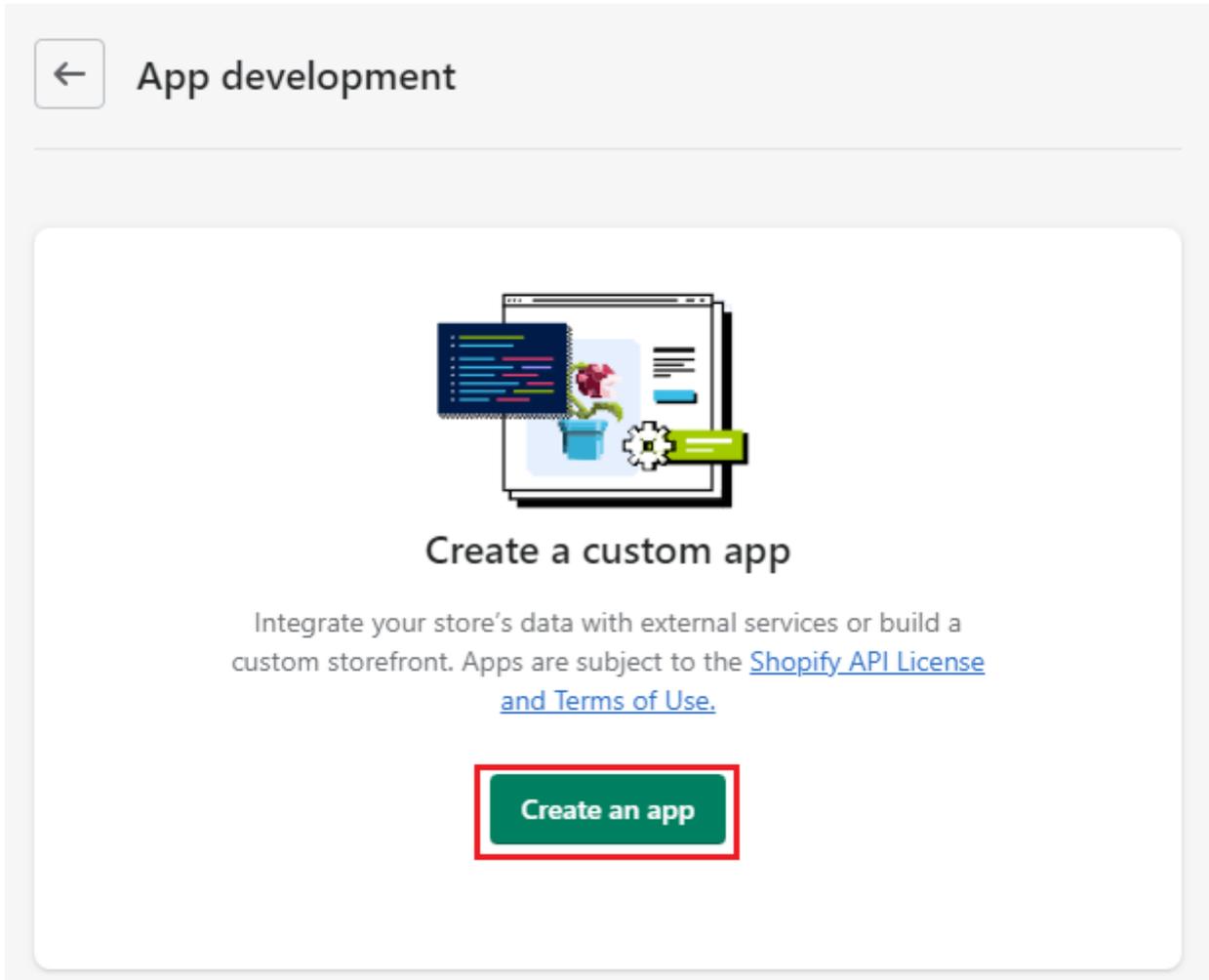
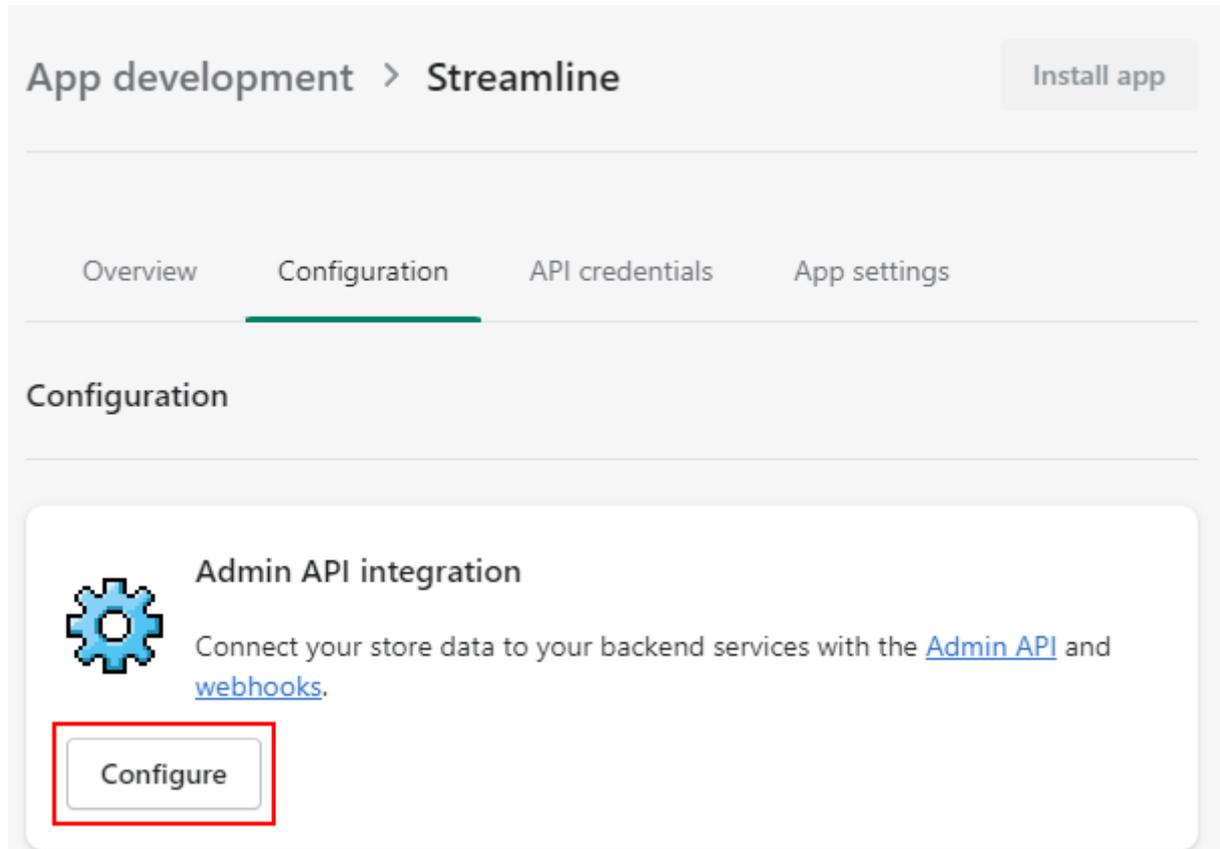6. Give a name for the app, for example, *Streamline*, and click the **Create app** button (see figure below).
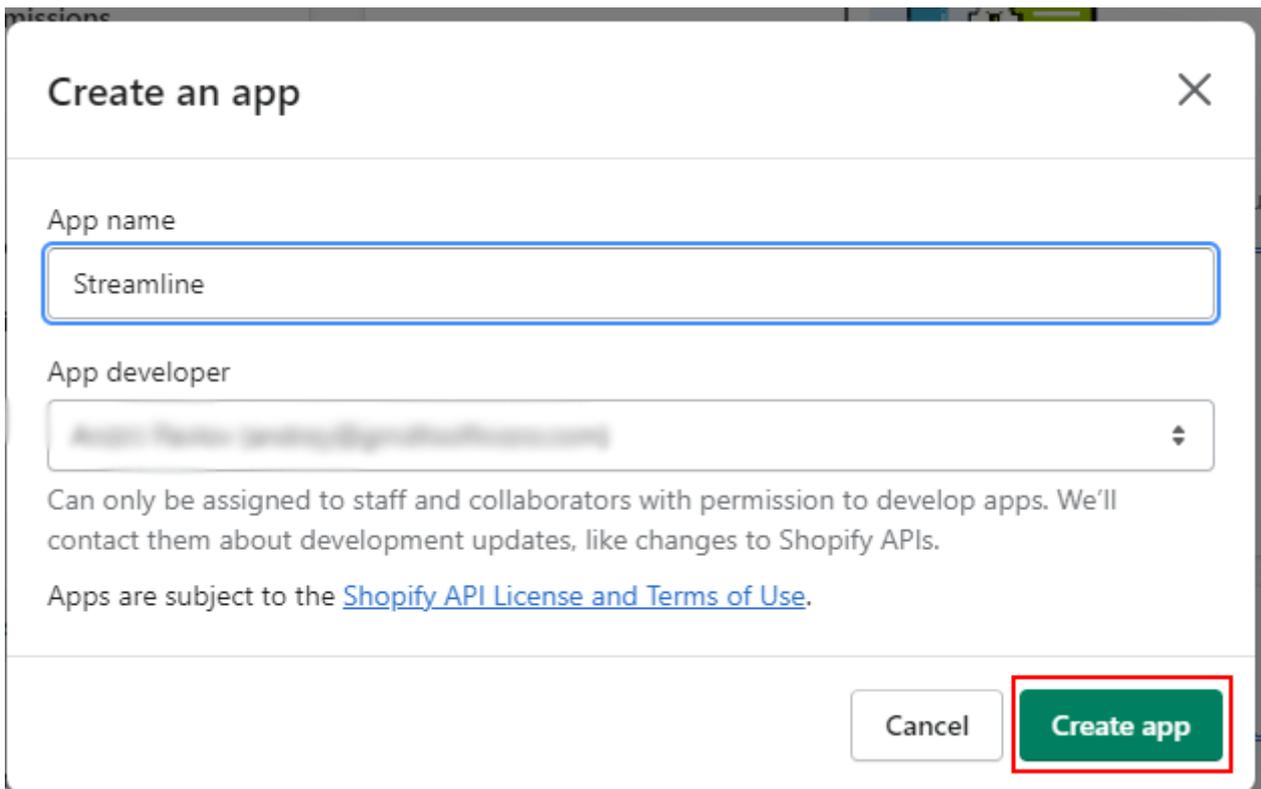
Now, we need to assign permissions for the created app. To do this:

7. Go to the **Configuration** tab and click the **Configure** button within the **Admin API integration** section (see figure below).


8. On the **Admin API access scopes** screen select the following permissions:

read_assigned_fulfillment_orders
read_customers
read_discounts
read_draft_orders
read_fulfillments
read_inventory
read_locations
read_merchant_managed_fulfillment_orders
read_metaobject_definitions
read_metaobjects
read_orders
read_product_listings
read_products
read_purchase_options
read_returns
read_channels
read_shipping
read_locales

read_third_party_fulfillment_orders
read_custom_fulfillment_services

After that, click the **Save** button (see figure below).
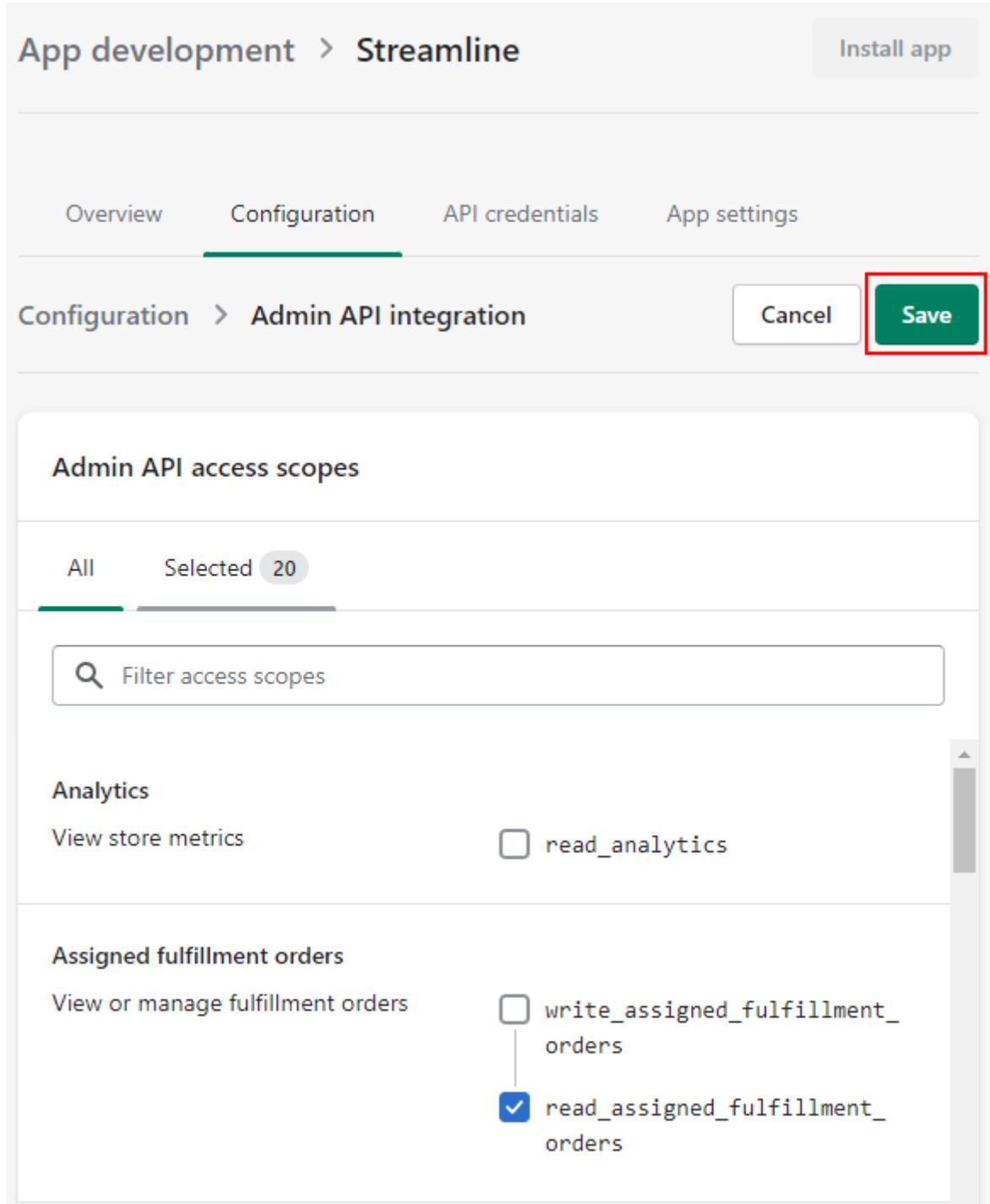
9. Now, go to the **API credentials** tab and click the **Install app** button in the **Access tokens** section (see figure below). In the pop-up window click the **Install** button.
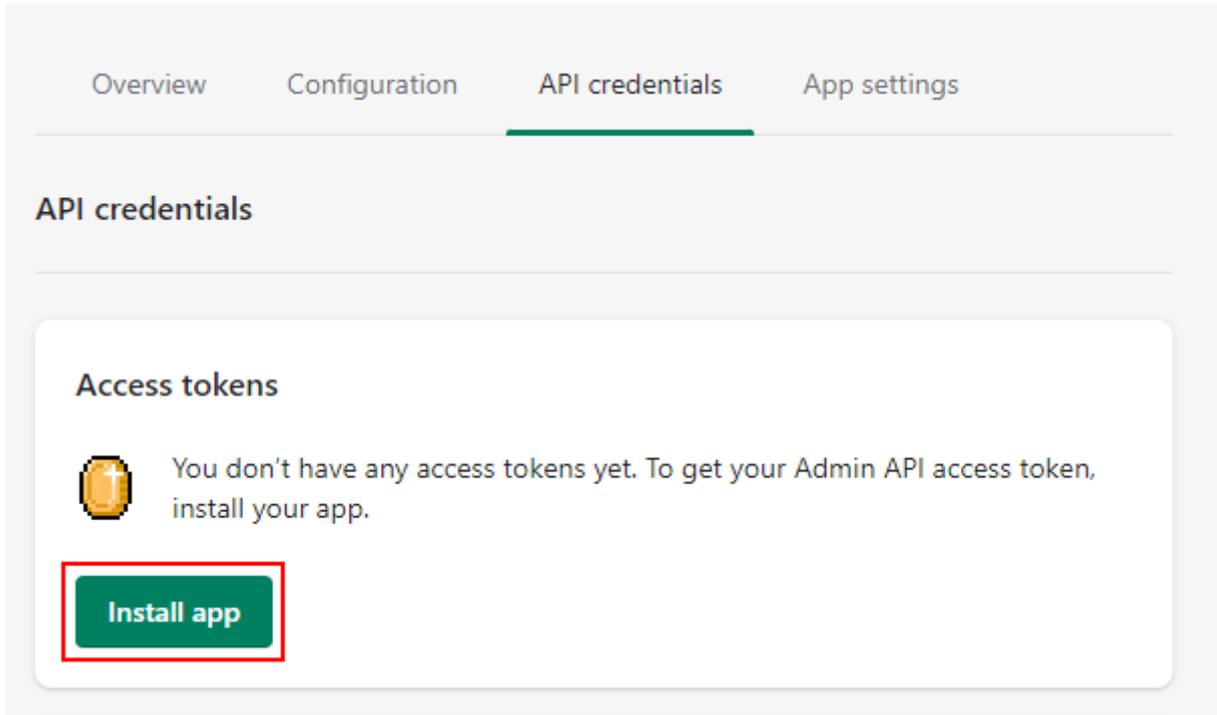
10. After that, click the **Reveal token once** link in the **Admin API access token** section (see figure below). As the Shopify message says, you can view it only once, thus, save it to some safe place, where only proper people from your company have access. This access token will be used to import data to Streamline.
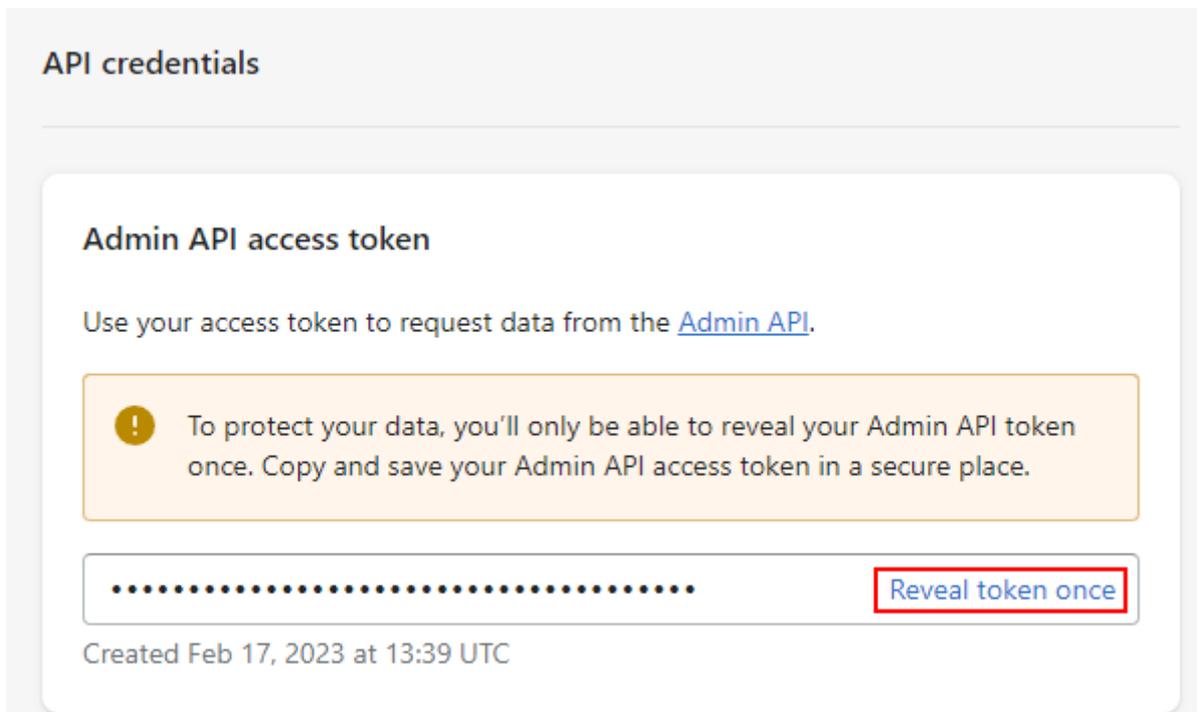
10. Go to the **API key and secret key** section and copy the **API key** (see figure below). This is the second parameter that is required for authorization.
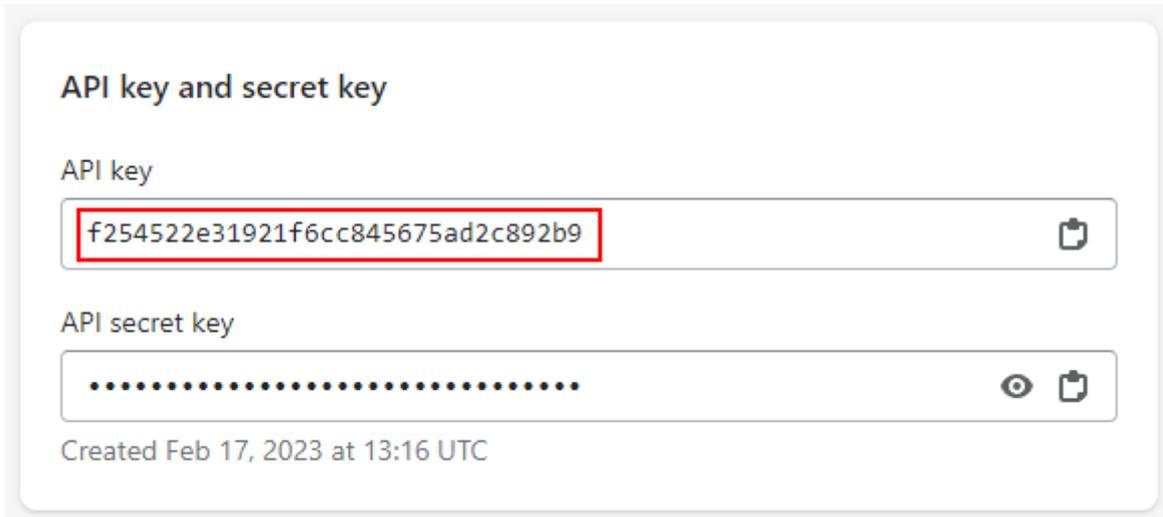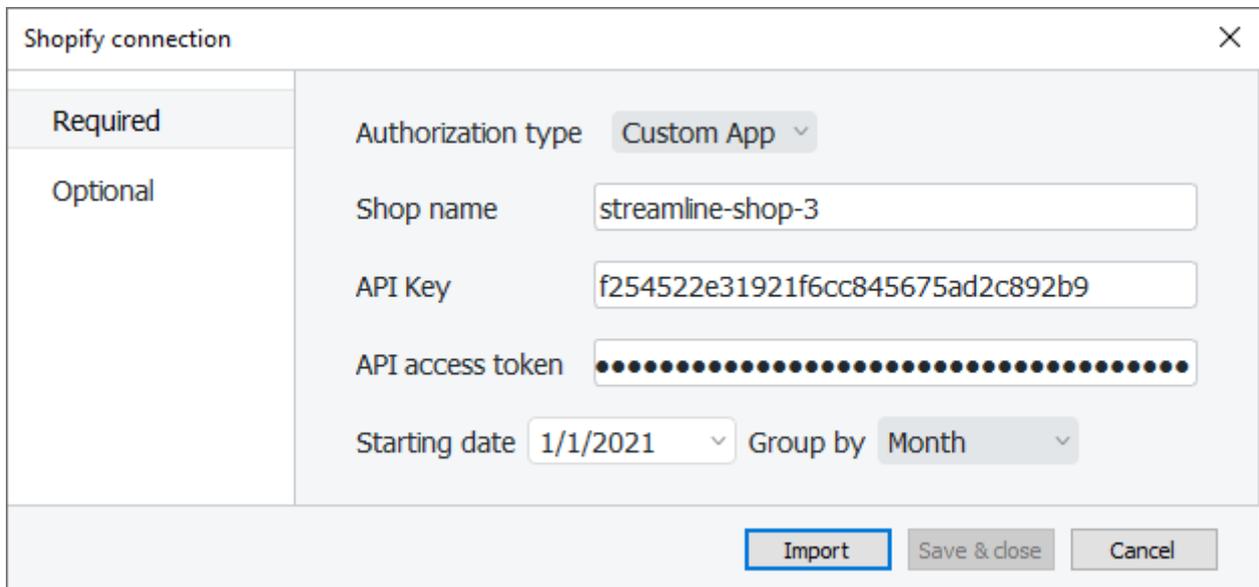
Now, having the *API access token* and *API key*, let's proceed to the next step.

Data Import Workflow

To create a new Streamline project from Shopify data, do the following:

1. Go to the **File** > **New** > **Shopify connection**. The **Shopify connection** dialog appears (see figure below).

2. Enter the name of your shop at Shopify into the **Shop name** field. This one you can extract from the URL you use to login into your shop: https://**<your-shop-name>**.myshopify.com.

3. Enter the *API key* and *API access token* got from the previous step into the **API key** and **API access token** fields.

4. Enter or choose the date to start the import from in the **Starting date** control.

To get accurate forecasts, we recommend providing Streamline with at least 24 months of sales history.
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5. Choose the data aggregation period in the **Group by** control. Streamline automatically aggregates your data in the given periods (days, weeks, or months). For example, if you want to see the forecasts, purchase/replenishment plans, and other reports in months, group the data by month.

6. Click the **Import** button.

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