4.5.13. How to Import Data from Shopify

In this article we describe:

• correspondence between key terms in Shopify and Streamline,

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- 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,
 - $\circ\,$ compute the number of days in the period you had run out of inventory (Stockout days), and
 - $\,\circ\,$ 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).

Apps and sales channels	Develop apps Shopify App Store
Installed	
1 sales channel	Sort by Newest first \$
Online Store - Sales channel	···· >
Learn more	about <u>apps</u>

3. Click on Allow custom app development (see figure below).



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

You are about to allow custom app development on your store This can't be undone.
Apps are subject to the <u>Shopify API License and Terms of Use</u> . Creating apps generates access tokens that provide API access to your data. You're responsible for keeping these tokens and the data they access secure. You should only give staff and collaborators that you trust permission to develop apps for your store.
Cancel Allow custom app development

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).

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Create an app	×
App name	
Streamline	
App developer	
And The Sector (Sector) (Sector) (Sector)	\$
Can only be assigned to staff and collaborators with permission to develop apps. We'll contact them about development updates, like changes to Shopify APIs.	
Apps are subject to the Shopify API License and Terms of Use.	
Cancel	арр

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).

App development > Streamline			Install app		
Overvie	W	Configuration	API credentials	App settings	
Configura	tion				
Config	Adn Conr <u>webł</u> gure	nin API integration nect your store data nooks.	on to your backend serv	vices with the <u>Admi</u>	<u>n API</u> and

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).

App development > Streamline	Install app
Overview Configuration API crede	ntials App settings
Configuration > Admin API integration	Cancel
Admin API access scopes	
All Selected 20	
Q Filter access scopes	
Analytics	A
View store metrics	read_analytics
Assigned fulfillment orders	
View or manage fulfillment orders	write_assigned_fulfillment_ orders read_assigned_fulfillment_ orders

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.

Overview	v Configuration	API credentials	App settings
API creden	tials		
Access t	okens		
You don't have any access tokens yet. To get your Admin API access token, install your app.			
Install	app		

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.

PI cred	entials	
Admi	n API access token	
Use yo	our access token to request data from the <u>Admin AP</u>	<u>l</u> .
9	To protect your data, you'll only be able to reveal y once. Copy and save your Admin API access token	your Admin API token n in a secure place.
••••		Reveal token once
Create	d Feb 17, 2023 at 13:39 UTC	

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.

API key	
f254522e31921f6cc845675ad2c892b9	Ċ
API secret key	

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).

Shopify connection		×
Required Optional	Authorization typeCustom App <Shop namestreamline-shop-3API Keyf254522e31921f6cc845675ad2c892b9API access token•••••••••••••••••••••••••••••••••	
	Import Save & dose Cancel	

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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