

Astrea ShopifyWave Connector

User Guide



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Astrea ShopifyWave Connector User Manual

App Summary:

Astrea ShopifyWave Connector is an Einstein Analytics Connector. This app is used to connect Wave with Shopify. It supports point and click Graphical User Interface which is very simple and easy to use.

The app provides synchronizes Shopify Objects: Customers, Products, Orders, Line Items to Salesforce Einstein Analytics Studio.

App users can perform following operations: Syncing Shopify Object like **Customers, Products, Orders, Line Items** by clicking respective buttons to upload.

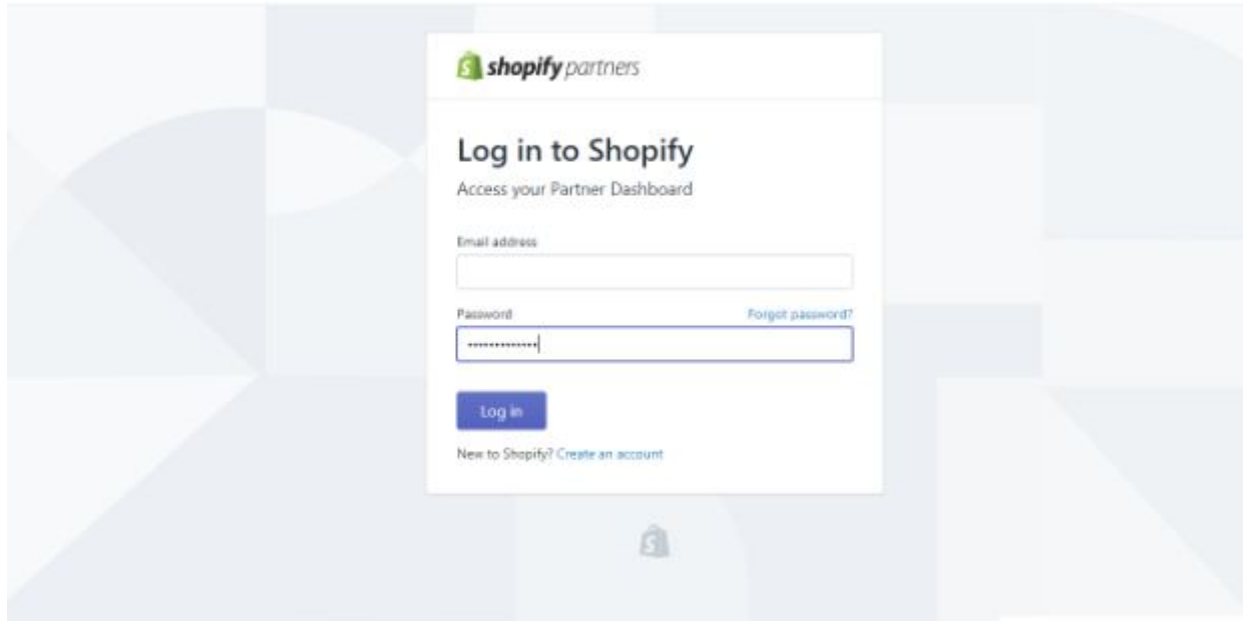
Features:

- ❖ ShopifyWave Connector app is a Lightning ready app that synchronizes Shopify Objects: Customers, Products, Orders, Line Items to Salesforce Einstein Analytics Studio.
- ❖ This App gets data from Shopify Objects (Customers, Products, Orders, Line Items) and uploads it to create Datasets into Einstein Analytics Studio.
- ❖ ShopifyWave Connector App provide a form to fill the Shopify AppId, AppSecret and Shop Name to get access to the Shopify Objects.
- ❖ Users can schedule the batch Jobs to get all the data from Shopify to Analytics Studio. Also there is a provision to immediately run the batch with the click of a button.
- ❖ After Creating Datasets, different lenses of insights can be developed for Dashboards.

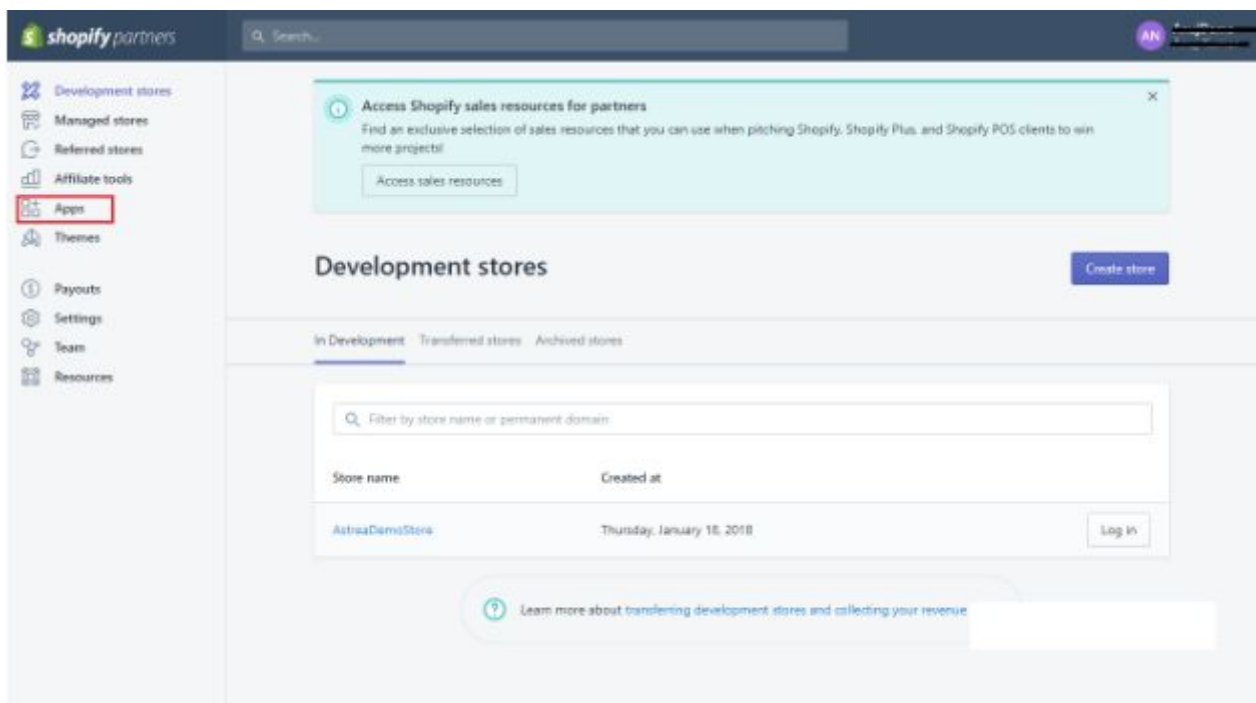
1. Configuration Settings

i) App Setting:

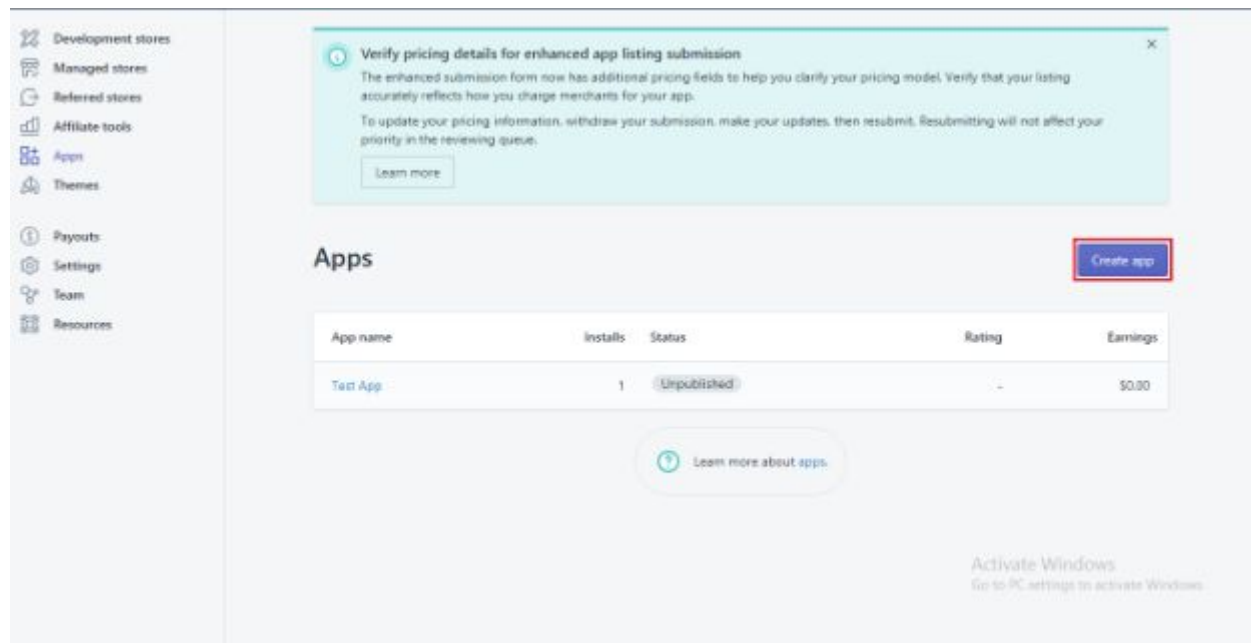
1. Visit the site of Shopify Partner <https://accounts.shopify.com/login>. Then Click on Partner Login. Now you will see the page as below:



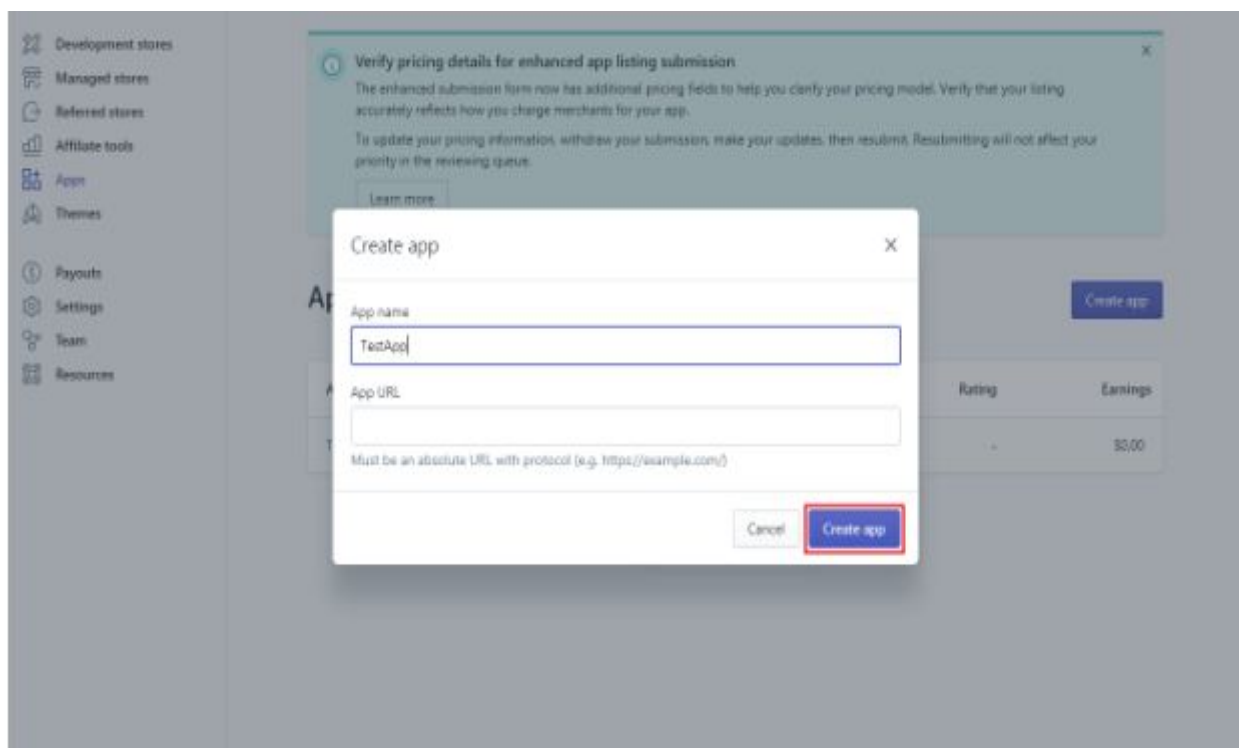
2. When you click on Login then the page will look like as below:



3. Click on the Apps and the Create App.



4. Now enter the App Name and App URL and Click on Create App Button.



5. After that click on Get API Credentials. Here you will get the Client Id, Client Secret and Enter the Redirect URI(you will get it on Shopify Authentication VF Page).

AstreaApp

App setup

App information

This information will be used to identify your app.

App name

For merchants using Shopify admin. [Learn more about these areas and what you can build.](#)

URLs

Shopify merchants access your app through the URLs you specify here.

App URL

Preferences URL (optional)

Whitelisted redirection URL(s)

Enter URLs on separate lines. After a merchant authorizes your app, they can be redirected back to any of these URLs. You can specify the URL using the `redirect_url` parameter during the authorization step.

App icon

Icons help merchants recognize and identify your app.

App icon
Must be a .jpg or .png, and a minimum of 512x512px

Orders

Read store orders with your app. [Learn more about orders.](#)

Read all orders

Your app can access the last 60 days of orders for a store. You can request access to a store's full order history, but merchants will be notified of this additional scope during the installation of your app. This may result in fewer installs.

Sales channel

Make it possible for merchant's to sell their products with your app. [Learn more about sales channels.](#)

Turn your app into a sales channel

Making your app a sales channel allows you to:

- Embed your sales channel in the merchant admin.
- Have merchants publish products to your channel
- Use the Checkout API and apply for additional payment processing options.

For your app to become a sales channel, it can't be published or have any installs. Once it has an install, the process can't be reversed.

Mandatory Webhooks

Required webhooks to manage requests to erase customer personal information. [Learn more about mandatory webhooks.](#)

Customer data erasure endpoint

Shop data erasure endpoint

App credentials

Use these keys to authenticate your app with Shopify.

API key

API secret key

Created about 1 month ago

- Save the App Id, App Secret and Shop Name for the Astrea ShopifyWave Connector App.
- In Einstein Analytics Studio, Go to APPS Tab and create a new App with Name: waveAppName

ii) Admin Setting:

This app uses the Shopify instance URL so admin needs to add Shopify Instance URL in Remote Site Settings. Follow the below steps to add Remote Site Settings.

Steps:

1. Goto Setup > in Administer > Security Controls > Remote Site Settings.
2. Add shopify instance URI (<https://YourShopName.myshopify.com>).

Remote Site Details

[Back to List: Remote Site Settings](#)

[Help for this Page](#)

Remote Site Detail		Edit	Delete	Clone
Remote Site Name	ShopifyWaveApp			Modified By Vikram Mehta , 3/6/2018 3:41 PM
Remote Site URL	https://[redacted].myshopify.com			
Disable Protocol Security	☐			
Description				
Active	☒			
Created By	Vikram Mehta , 3/6/2018 3:41 PM			
		Edit	Delete	Clone

iii) End User Settings:

First user need to install the app from the Salesforce AppExchange.

Install Astrea ShopifyWave Connector

By Astrea IT Services Pvt Ltd


☒ Install for Admins Only


☐ Install for All Users

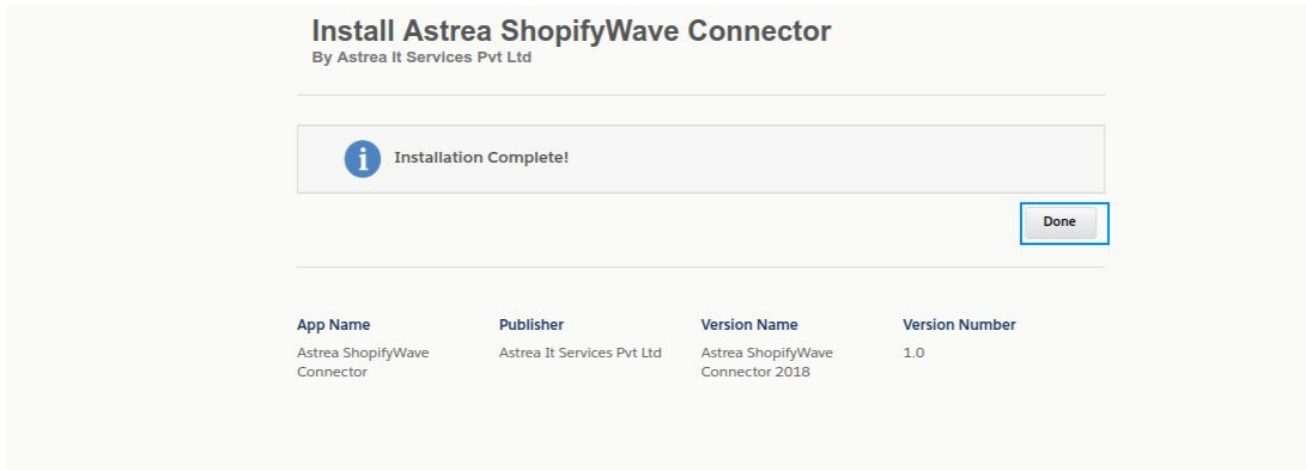

☐ Install for Specific Profiles...

[Install](#) [Cancel](#)

App Name	Publisher	Version Name	Version Number
Astrea ShopifyWave Connector	Astrea IT Services Pvt Ltd	Astrea ShopifyWave Connector 2018	1.0

[Additional Details](#) [View Components](#)

Installation is done when user will reached to that step.



To confirm that the app is installed properly or not in the user org, User can check in our org by search in [Quick Find/ Search](#) for [Installed Packages](#) and screen will look like this.

Installed Packages									
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall	Astrea ShopifyWave Connector	Astrea IT	1.0	AShopyWave	3/29/2018 1:01 PM	✓	0	1	1
Uninstall	Trailhead Data Manager	Salesforce	2.4		3/27/2018 5:13 PM	✓	1	0	0
Description Allows you to have meaningful training data to do the Wave Trails (=tutorials) on Salesforce Trailhead.									

User needs to go to “[Astrea ShopifyWave Connector](#)” tab.

Enter App Id, App Secret, ShopName of the Shopify Account that before saved. Click on the Authenticate button.

Service

Home

Chatter

Accounts

Contacts

Cases

Reports

Dashboards

Astrea ShopifyWave Connector

Shopify Configuration

Prerequisites

1. Create a Shopify Developer Account Using Your Shopify Account Credentials.

2. Create an APP in Shopify.

3. Enter Following Redirect URI while creating application In Shopify Developers Instance: <https://ashopifywave.ap5.visual.force.com/apex/ShopifyAuthentication>

4. Also, at Salesforce create a Remote Site Setting for the following URL: https://YourShopName.myshopify.com/admin/oauth/access_token

5. In Einstein Analytics Studio, Go to APPS Tab and create a new App with Name: WaveAppName

Please Provide Following Credentials Obtained From Created App in Shopify Developers Account

Shopify App Id:

626fe8e862a14d8bc28bf4aee41c2e6b

Shopify App Secret:

20ef31d85cf8cf7e8ca4a3ca8f82de3e

Shopify Shop Name:

Authenticate

Shopify Login Page will appear. Login the Shopify Account with your Username And Password.

Then click on unlisted app.

You are about to update testing



testing will be able to:

View products	View details
View orders	View details
View customers	View details

testing will not view your Online Store, modify your customers, or modify your orders.

CancelUpdate unlisted app

Then Page will redirect with the Message “[Successfully Authenticated](#)” to ShopifyAuthentication Page.

Click on [Get Access Token](#) button.

Authentication Results

Authentication Status

Successfully Authenticated.

Get Access Token

After Getting Access token, Page will redirect to the Main Functionality of the ShopifyWave Connector.

Service

Home Chatter Accounts Contacts Cases Reports Dashboards Astrea ShopifyWave Connector

Shopify Configuration

Successfully Obtained Shopify Access Token.

Upload Customers

Upload Products

Upload Orders

Upload Line Item

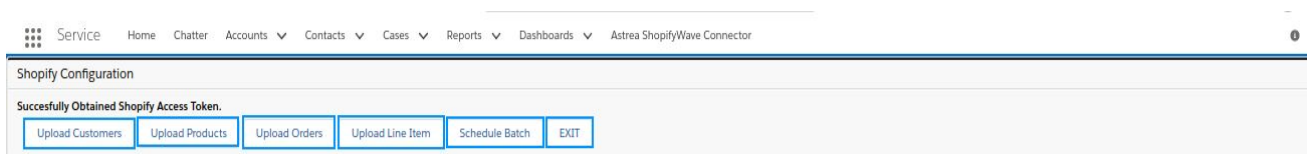
Schedule Batch

EXIT

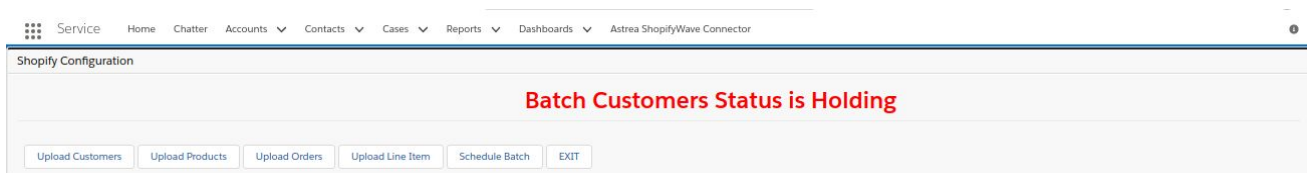
iv) ShopifyWave Connector App Functionality

There are 5 buttons are available to get data from Shopify to Salesforce Einstein Analytics Studio that are “[Upload Customers](#)”, “[Upload Products](#)”, “[Upload Orders](#)”, “[Upload Line Item](#)”, “[Schedule Batch](#)” and “[Exit](#)”.

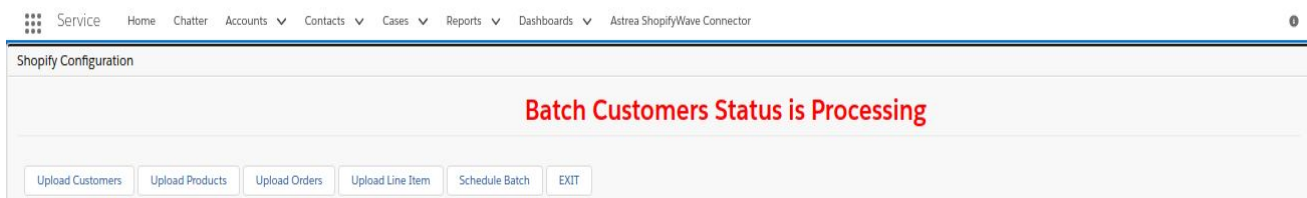
When user want to pull data from Shopify to Salesforce Einstein Analytics so for that user need to click on [Upload Objects](#) button.



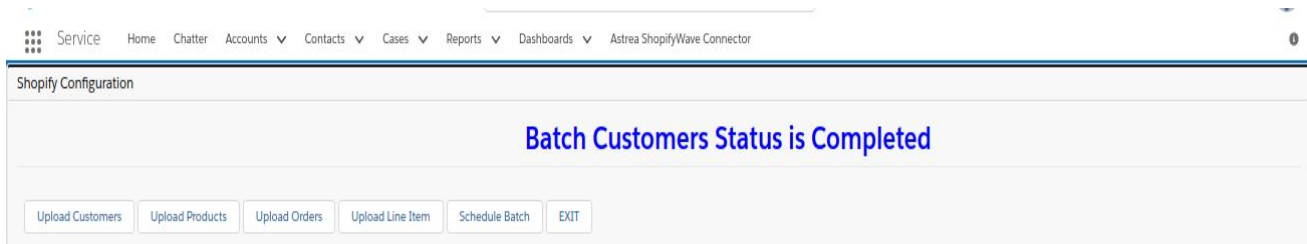
User can see the [Running Batch Status](#) As shown in the below screenshot:



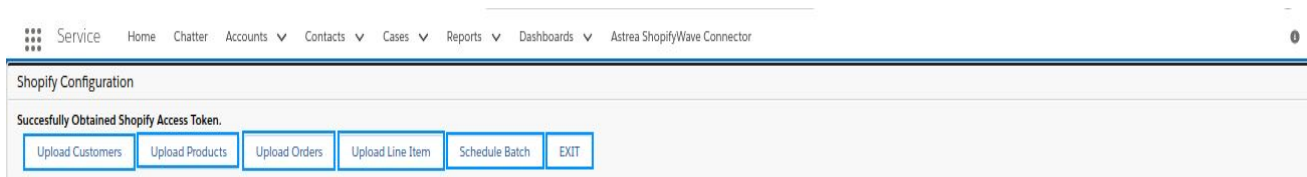
First the current running status of batch is **Holding** and after that is **Processing**. As shown in the screenshot below:



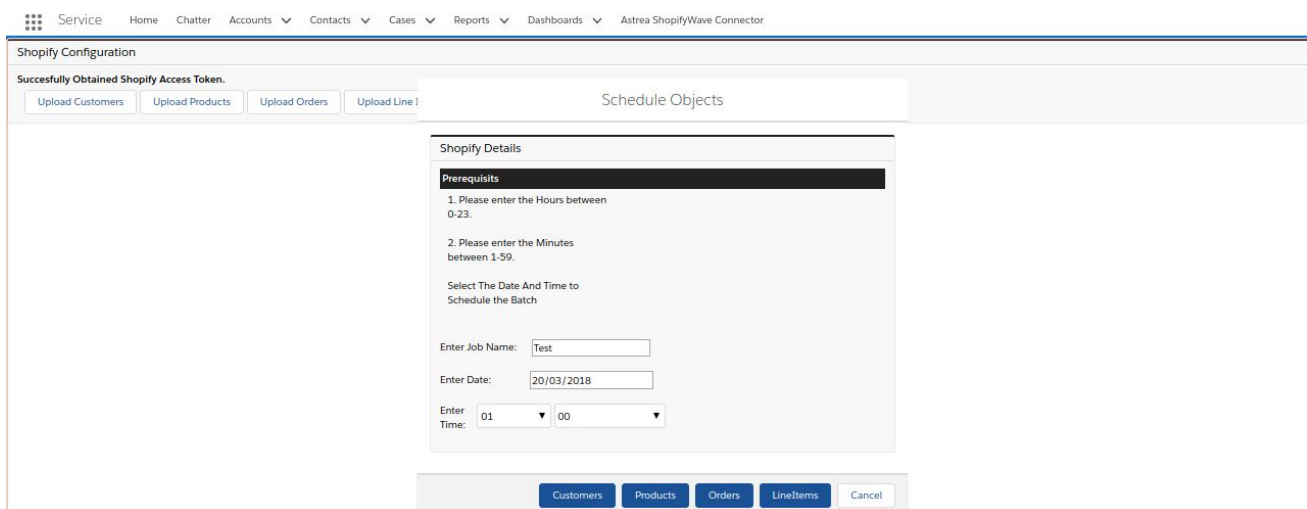
After that Status is [Completed](#). As shown in the screenshot below:



When user click on the **Schedule Batch** button it will schedule a job everyday at specified time entered by user.



For Scheduling the batch user need to click on Schedule Batch button. the page will redirect to another page, here user can enter name of the job and time at which he/she wants to schedule the job (shown in the screenshot below).



After job is scheduled successfully you can see details in 'Scheduled Jobs' in salesforce interface.

All Scheduled Jobs

[Help for this Page](#)

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

View: [All Scheduled Jobs](#) [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [All](#)

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Manage Del	Test	Mehta, Vikram	3/19/2018 3:00 PM		3/20/2018 1:00 AM	Scheduled Apex

You can schedule other objects also by click again on “[Schedule Batch](#)” or Click “[Exit](#)” to get back to front page for Authentication.

After Uploading all Objects of Shopify in Salesforce Einstein Analytics Studio, User can see their data in Analytics studio app by click on Analytics Studio In App Launcher.

App Launcher

Find an app or item

Visit AppExchange

▼ All Apps

**Service**
Manage customer service with accounts, contacts, cases, and more

**Marketing**
Best-in-class on-demand marketing automation

**Community**
Salesforce CRM Communities

**Site.com**
Build pixel-perfect, data-rich websites using the drag-a... [More](#)

**Salesforce Chatter**
The Salesforce Chatter social network, including profile... [More](#)

**Content**
Salesforce CRM Content

**Analytics Studio**

**Sales**
Manage your sales process with accounts, leads, opportun... [More](#)

**Trailhead Data Manager**
Allows you to have meaningful training data to do the Wa... [More](#)

**Einstein Discovery**
Einstein Discovery quickly sifts through huge amounts of... [More](#)

**Service Console**
(Lightning Experience) Lets support agents work with mul... [More](#)

**Sales Console**
(Lightning Experience) Lets sales reps work with multipl... [More](#)

▼ All Items

Accounts

Analytics

App Launcher

Approval Requests

Assets

Astrea ShopifyWave Connector

Calendar

Campaigns

Cases

Chatter

Contacts

Contracts

Dashboards

Duplicate Record Sets

Files

Forecasts

Groups

Home

Leads

List Emails

Macros

Opportunities

Orders

People

Price Books

Products

Quick Text

Reports

Scorecards

Streaming Channels

User can see their created Datasets in the App named as “[waveAppName](#)”. Now Create different visualizations using datasets created by ShopifyWave Connector.

Here are some Sample Charts on Shopify Data:

