

Shopify Setup - Perfion Partners

Perfion 2025-R3

This document explains how to install the Perfion-Shopify connector and connect a Shopify Store to the Perfion demo database on your Perfion demo server.

Prerequisites

- You must have a Shopify account with a demo store
- Your Perfion demo server must be upgraded to Perfion 5.8 - 2025-R3

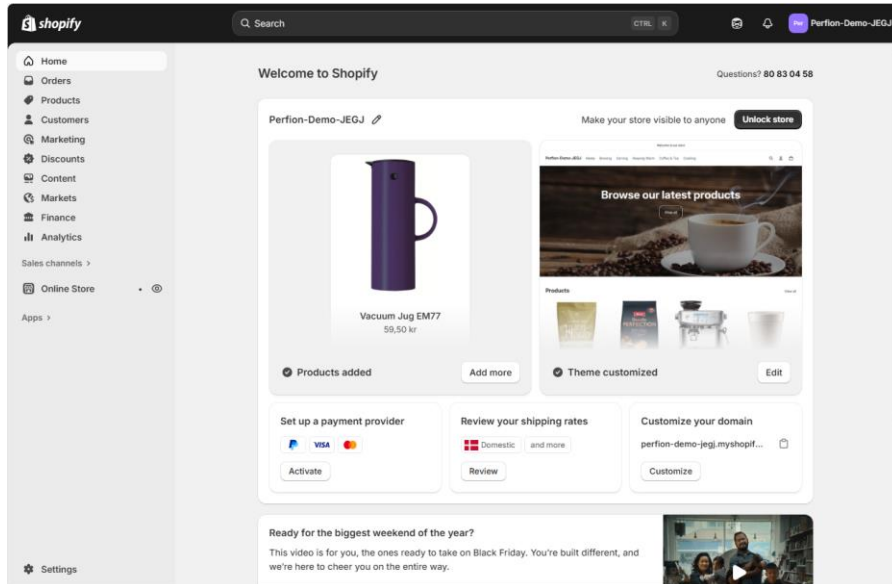
Steps

The process consists of six main steps; each explained on the following pages:

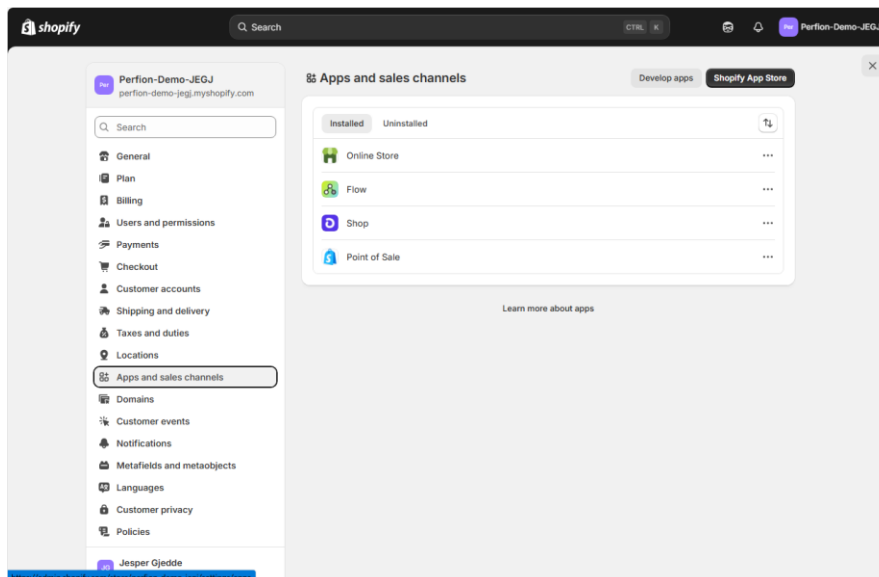
1. Set up a Perfion app in Shopify Admin
2. Create a Perfion location (for inventory)
3. Create a Perfion Token
4. Update the Shopify connector settings
5. Run the connector the first time
6. Customize Shopify Store front theme

1. Set up a Perfion app in Shopify Admin

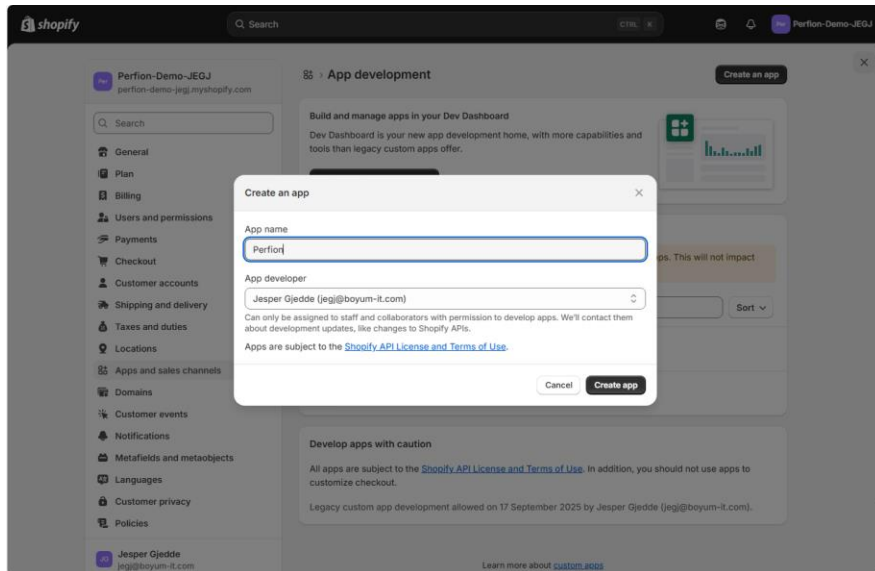
- Log in to your Shopify Admin account
- Click *Settings* in bottom left corner



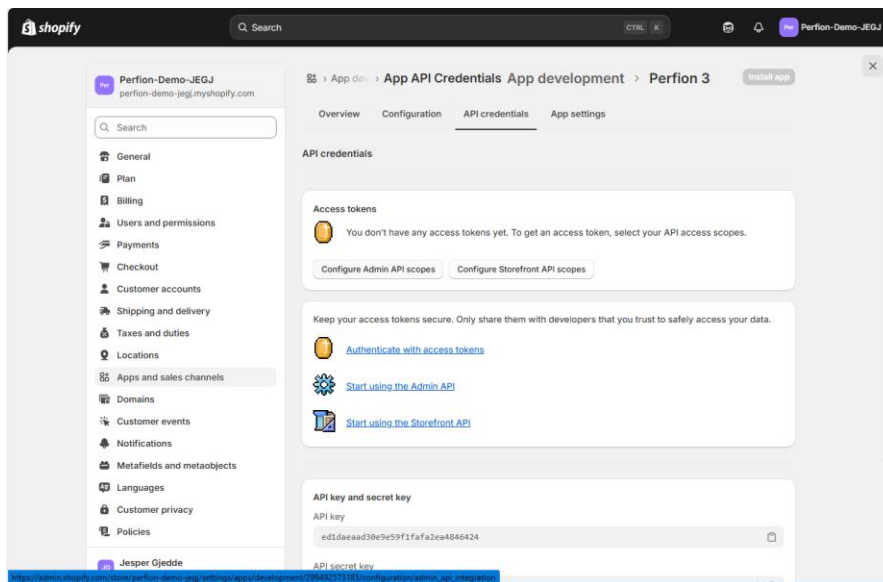
- Click *Apps and sales channels* in left menu
- Click *Develop apps* in top row



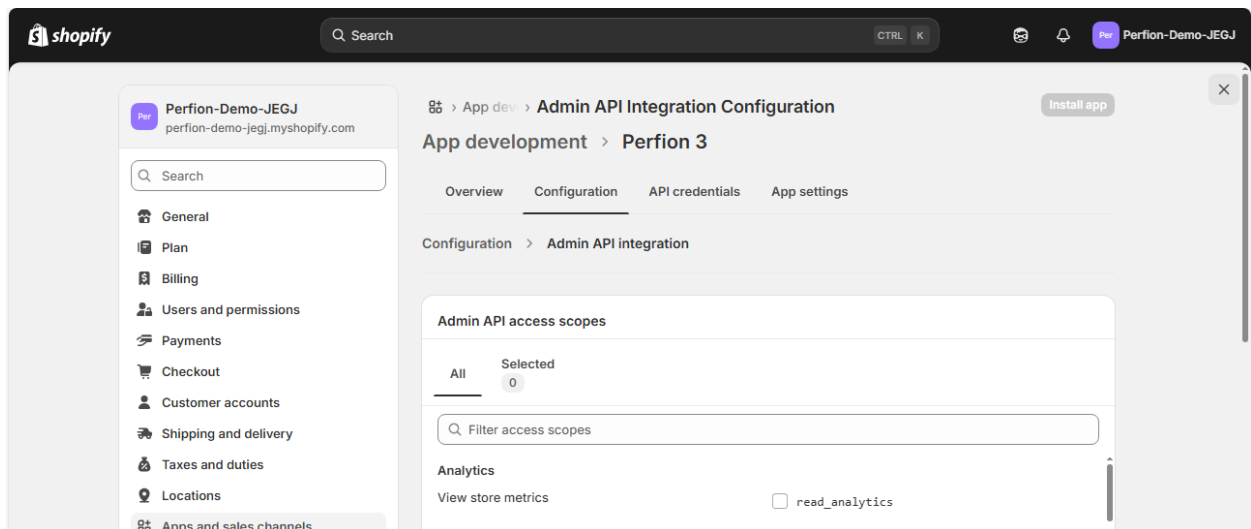
- Click *Create an app* in top row
- Name the app *Perfion*
- Select *yourself* as App developer
- Click *Create app*



- Click the tab *API credentials*
- Click *Configure Admin API scopes*



- In *Admin API access scopes*, check the 16 boxes shown below



Files

View or manage files

- write_files
- read_files

Inventory

View or manage inventory across multiple locations

- write_inventory
- read_inventory

Locations

ⓘ Includes personally identifiable information

View the geographic location of stores, headquarters, and warehouses

- write_locations
- read_locations

Metaobject definitions

View or manage definitions

- write_metaobject_definitions
- read_metaobject_definitions

Metaobject entries

View or manage entries

- write_metaobjects
- read_metaobjects

Products

View or manage products, variants, and collections

- write_products
- read_products

Publications

View or manage groups of products that have been published to an app

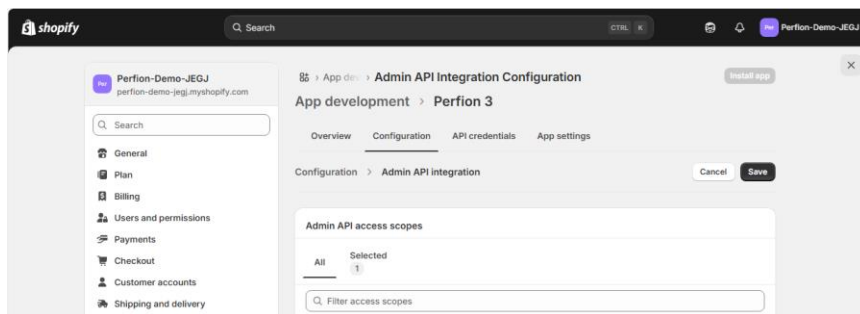
- write_publications
- read_publications

Translations

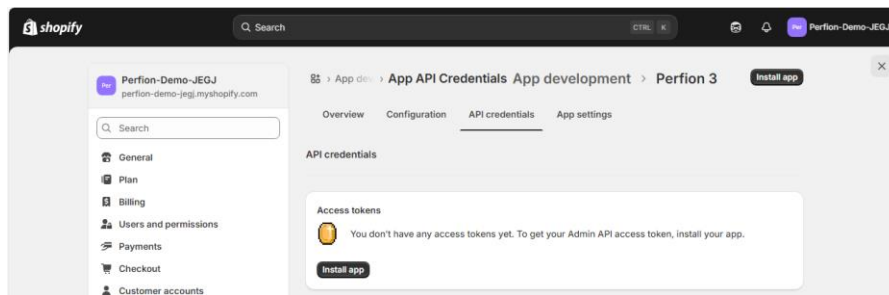
View or manage content that can be translated

- write_translations
- read_translations

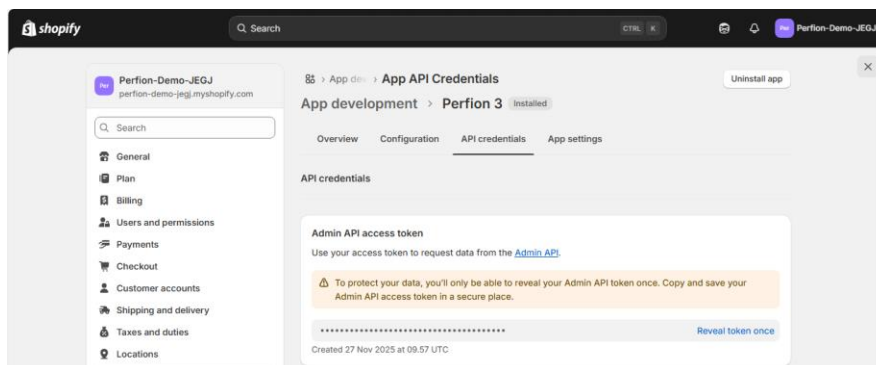
- When all boxes are checked, click *Save*



- Go back to tab *API credentials*
- In the *Access tokens* section, Click *Install app*

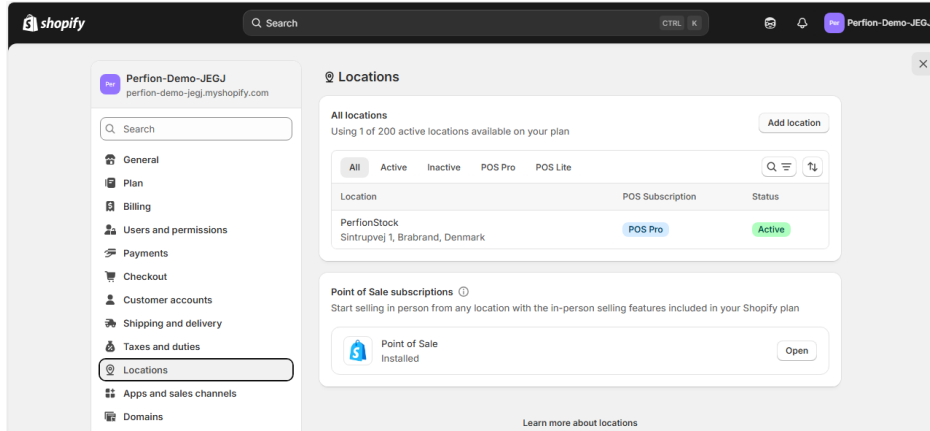


- **IMPORTANT** – The following step can only be done once!
- Click *Reveal token once*
- Copy the revealed token to a safe location (you'll need it for the Shopify connector)

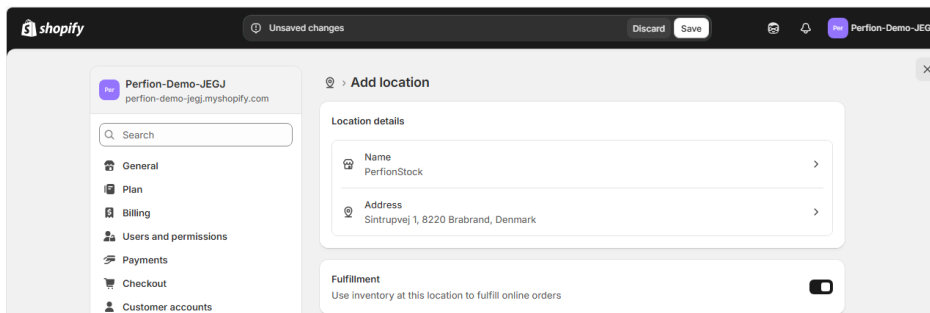


2. Create a Perfion location

- Click *Locations* in left menu
- Click *Add location* in top row



- Name your location *PerfionStock* (make sure to use this name)
- Give it an address
- Click *Save* in the top black header



4. Update the Shopify connector settings

- Create a copy of "C:\Perfion Data\Shopify\appsettings.json.example" and name it "C:\Perfion Data\Shopify\appsettings.json"
- Open "C:\Perfion Data\Shopify\appsettings.json" and customize like this:
 - GetDataUri: path to Perfion API (https required)
 - PerfionToken: the one you generated on the Service Account
 - Channel: ShopifyChannel
 - BaseUri: path to your Shopify store
 - AccessToken: the one you generated in Shopify



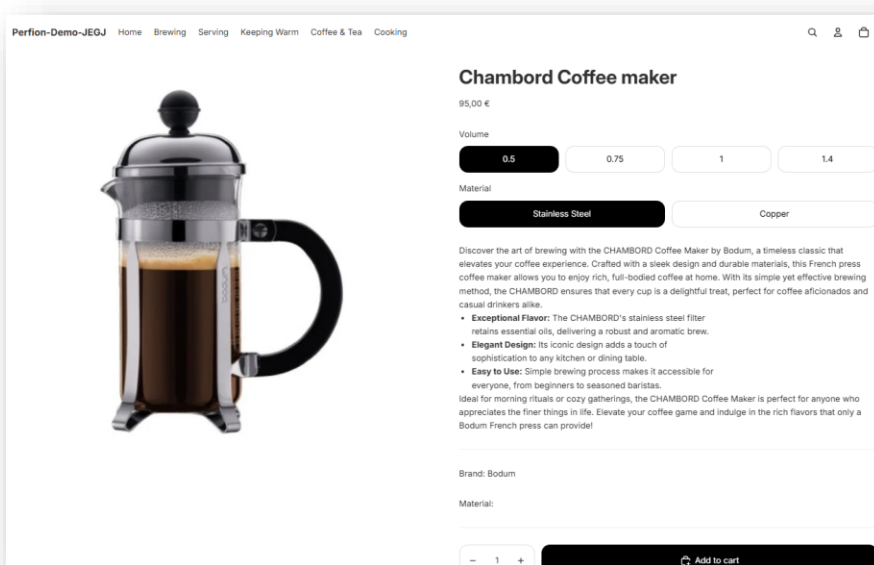
```
1 {
2   "AllowedHosts": "*",
3   "PerfionApi": {
4     "GetDataUri": "https://api.local/Perfion/GetData.asmx",
5     "PerfionToken": "[Your Perfion Token]",
6     "Channel": "ShopifyChannel"
7   },
8   "ShopifyApi": {
9     "BaseUri": "https://perfion-demo-1egj.myshopify.com/",
10    "AccessToken": "[Your Shopify Token]"
11  },
12  "Serilog": {
13    "MinimumLevel": {
14      "Default": "Information",
15      "Override": {
16        "System": "Warning",
17        "Microsoft": "Warning",
18        "Perfion.LicenseServer.Utils.ApiKeyAuthenticationHandler": "Warning"
19      }
20    },
21    "WriteTo": [
22      {
23        "Name": "File",
24        "Args": {
25          "path": "logs/log.txt",
26          "rollingInterval": "Day",
27          "fileSizeLimitBytes": null,
28          "retainedFileCountLimit": 15,
29          "outputTemplate": "{Timestamp:yyyy-MM-dd HH:mm:ss.fff zzz} [{Level}] [{SourceContext}] [{RequestId}] : {Message} {Exception}{NewLine}"
30        }
31      },
32      "Console"
33    ]
34  }
35 }
```

5. Run the connector the first time

- Start a command prompt
- Run file "C:\Perfion Data\Shopify\Perfion.ShopifyConnector.exe"
- Messages should confirm that 5 categories and 19 products in Perfion are being synced to Shopify
 - NOTE: you might see some warnings that IDs exist in Perfion but not in Shopify. That's okay.

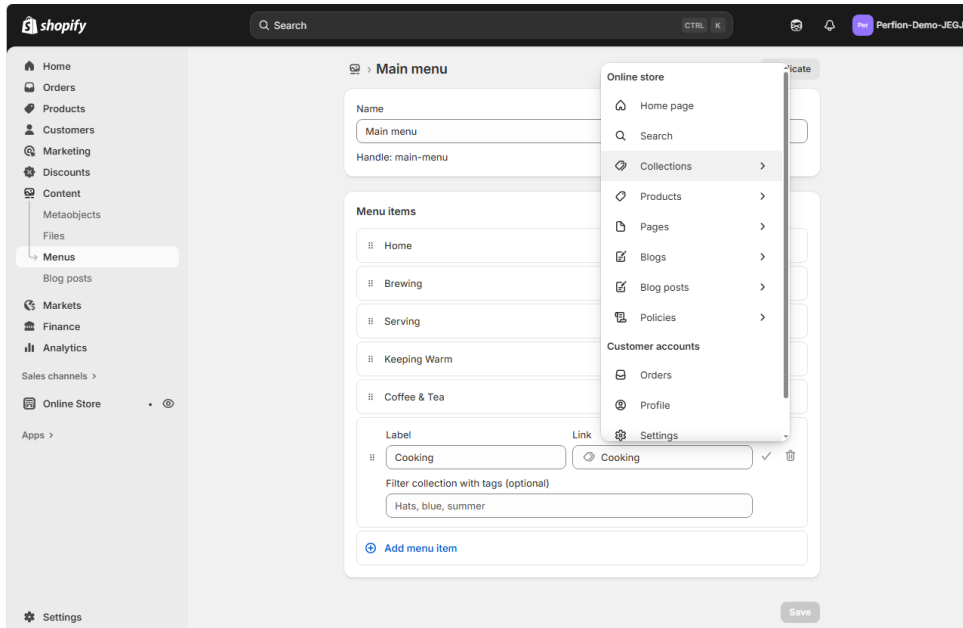
```
Perfion
13:54:31 INF The Shopify Connector is using Shopify GraphQL API version 2025-07.
13:54:38 INF Starting a new Delta synchronization.
13:54:43 INF Category 1 out of 5
13:54:44 INF Category 2 out of 5
13:54:44 INF Category 3 out of 5
13:54:45 INF Category 4 out of 5
13:54:45 INF Category 5 out of 5
13:54:46 INF 19 products to be synchronized
13:54:46 INF Product 1 out of 19: Chambord Coffee maker
13:54:53 INF Product 2 out of 19: Staub Mug
```

- When done, check Shopify Admin and Store and verify that products have arrived as intended and can be added to cart

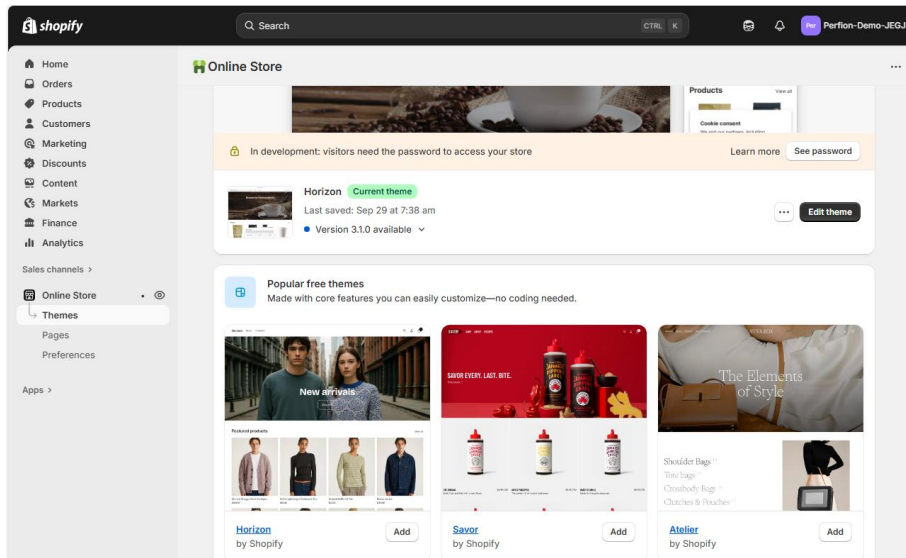


6. Customize Shopify Store front theme

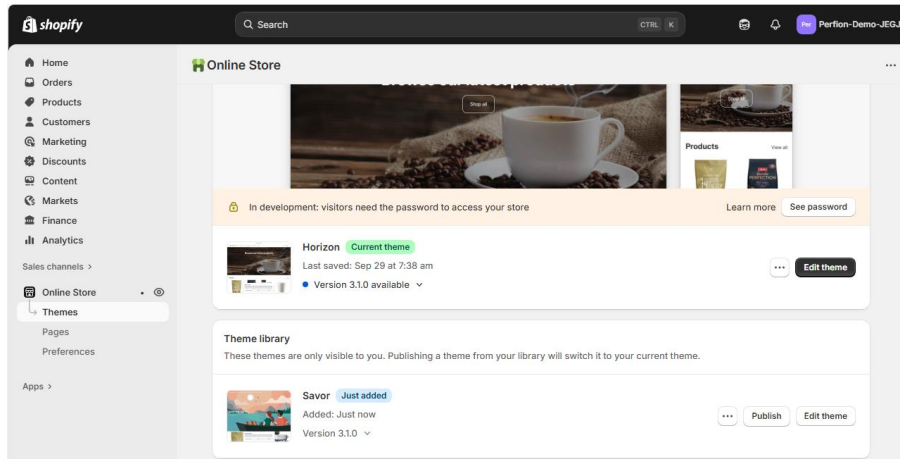
- Go to *Content* -> *Menus* and create menu items as below
- Link each menu item to the corresponding *Collection*
 - Collections are created by the Perflon connector



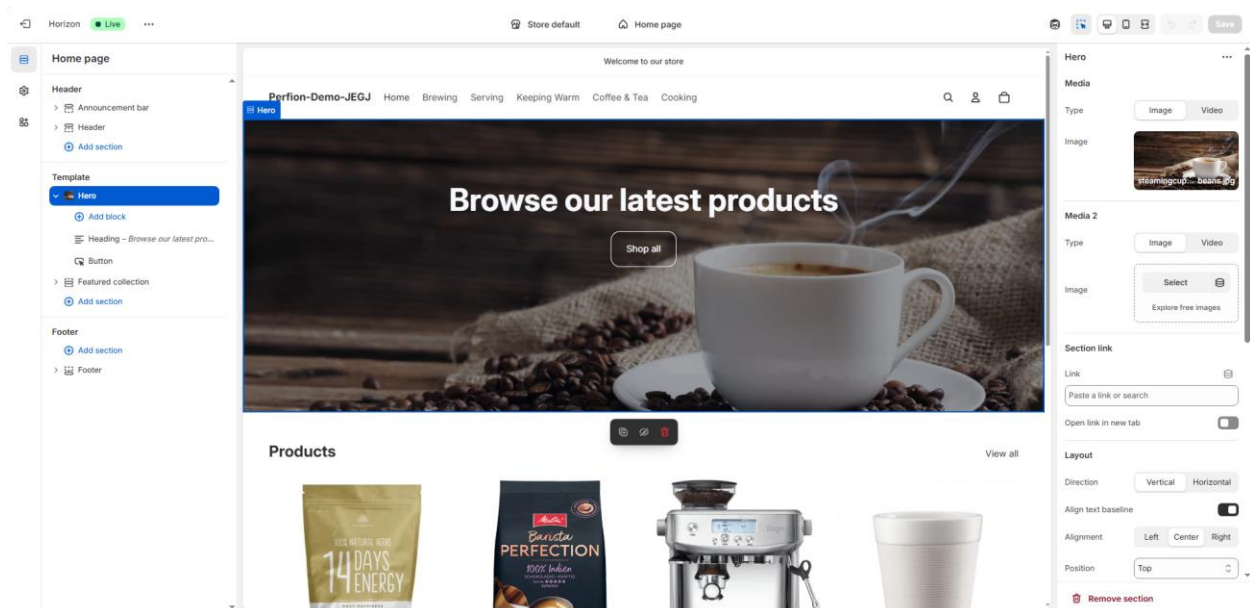
- Click *Online Store* -> *Themes* in left menu
- Under *Popular free themes*, locate *Horizon* and click *Add*



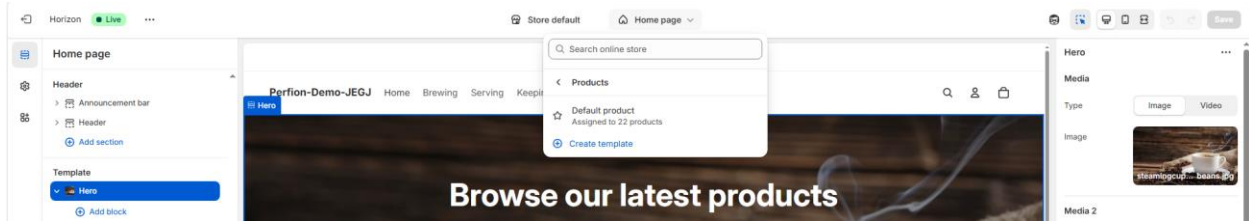
- When installed, find the theme in *Theme Library* and click *Publish*
- Horizon will now appear as your Current Theme



- Click *Edit theme*
- Change the Hero image to some nice coffee image



- Click *Home page* at the top and change to *Default product*



- In the left menu, expand *Product information*
- Below *Product description*, add two text blocks for *Brand* and *Material*
- In the left menu, select one of the new text blocks
- In the right panel, click the *database icon* and select either *product_brand* or *product_material*
 - These are metafields created by the Perfion connector
- Write *Brand:* and *Material:* in front of placeholders
- Click *Save* and see the result in your store

