Shopify Setup - Perfion Partners

Perfion 2026-R1-SR2

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 or newer

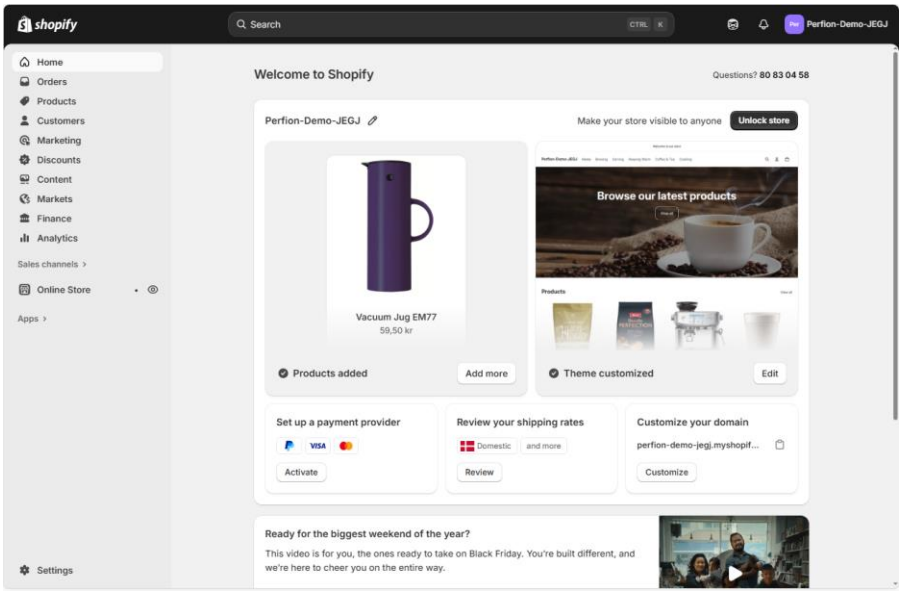
Steps

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

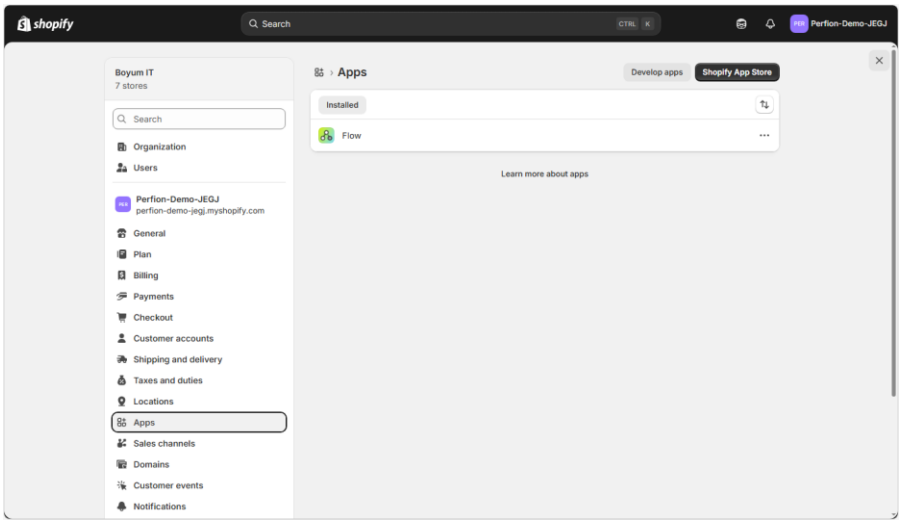
1. Set up a Perfion app in Shopify Admin
2. Create a Perfion location (for inventory)
3. Create a Perfion Token
4. Update the Shopify connector settings
5. Run the connector the first time
6. Customize Shopify Store front theme

1. Set up a Perfion app in Shopify Admin

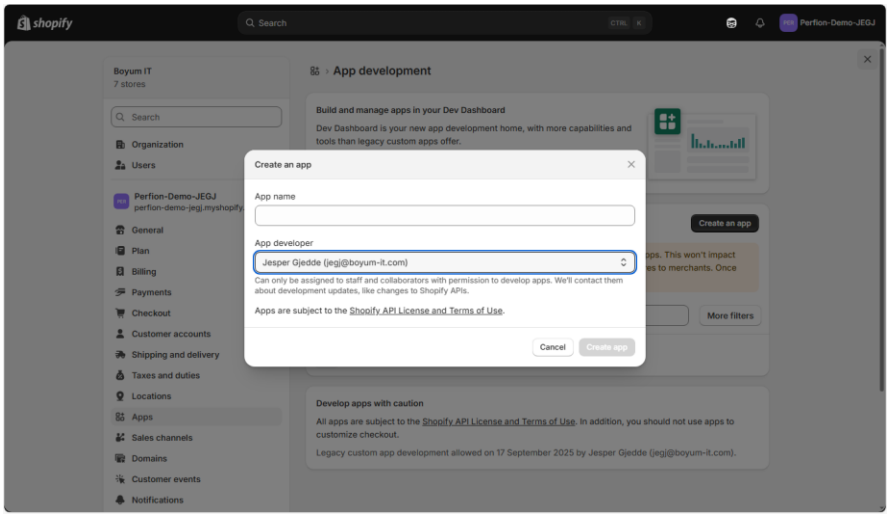
- Log in to your Shopify Admin account
- Click *Settings* in bottom left corner



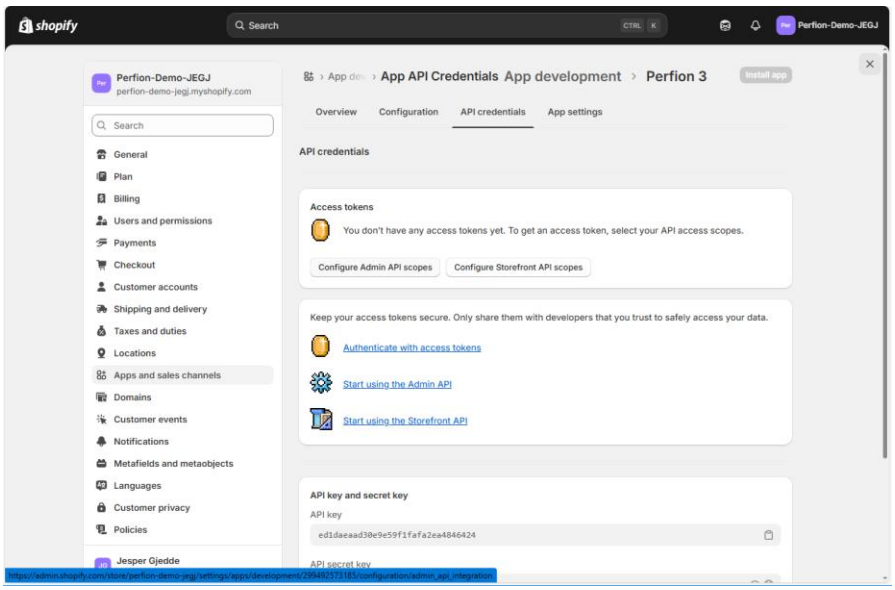
- Click *Apps* in left menu
- Click *Develop apps* in top row



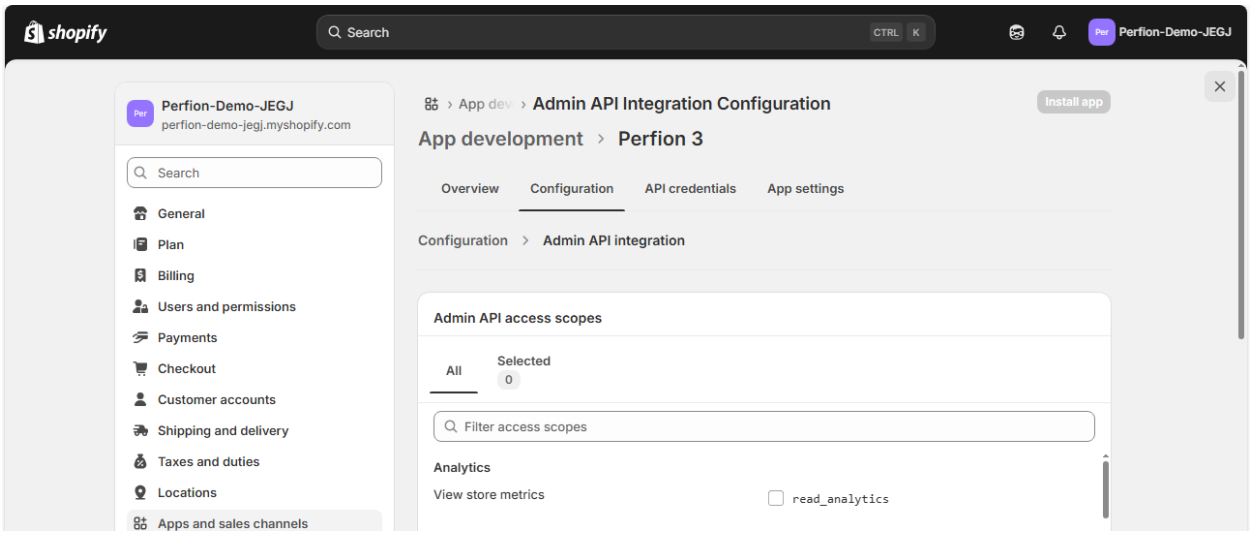
- Click *Create an app* in top row
- Name the app *Perfion*
- Select *yourself* as App developer
- Click *Create app*



- 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

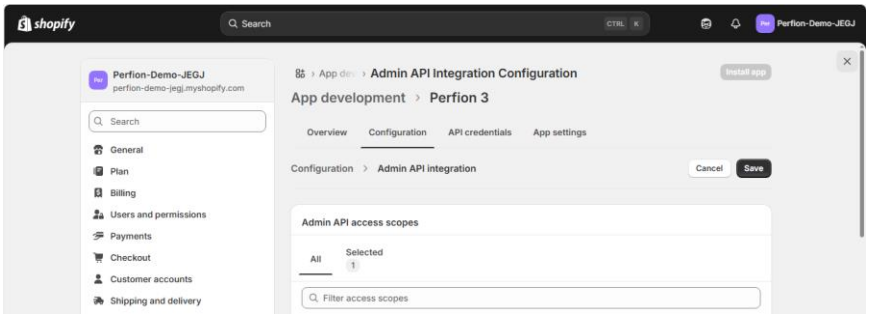
- ☑ `write_publications`
- ☑ `read_publications`

Translations

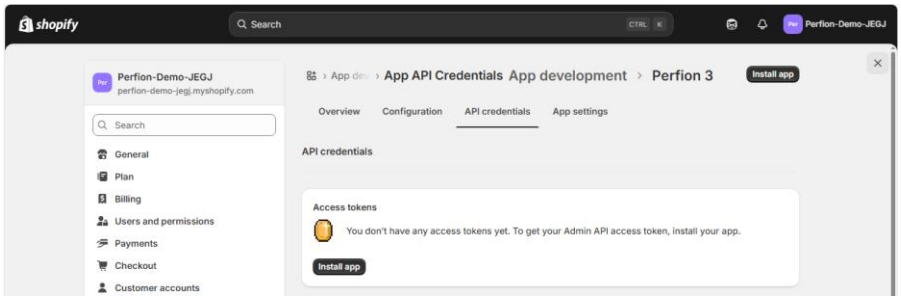
View or manage content that can be translated

- ☑ `write_translations`
- ☑ `read_translations`

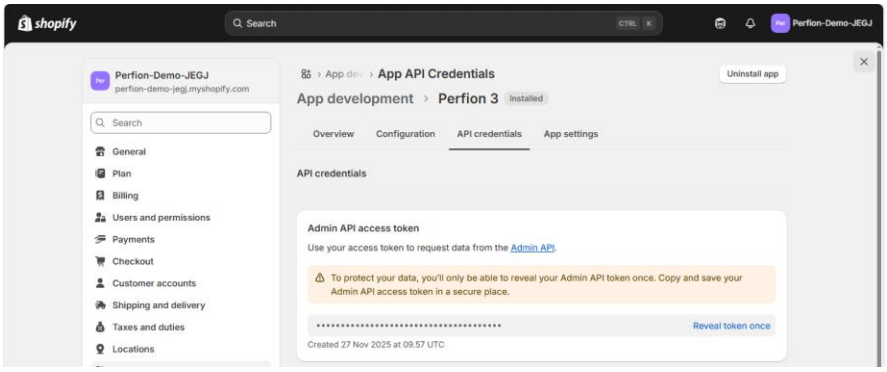
- When all boxes are checked, click *Save*



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

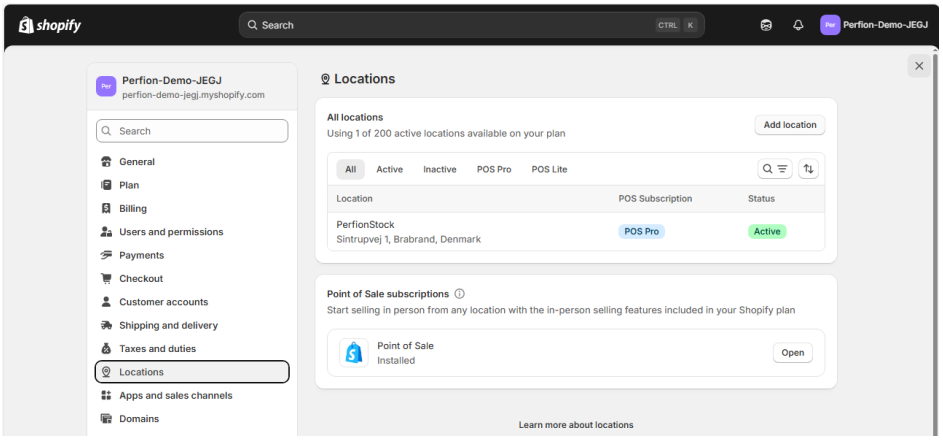


- IMPORTANT – The following step can only be done once!
- Click *Reveal token once*
- Copy the revealed token to a safe location (you'll need it for the Shopify connector)

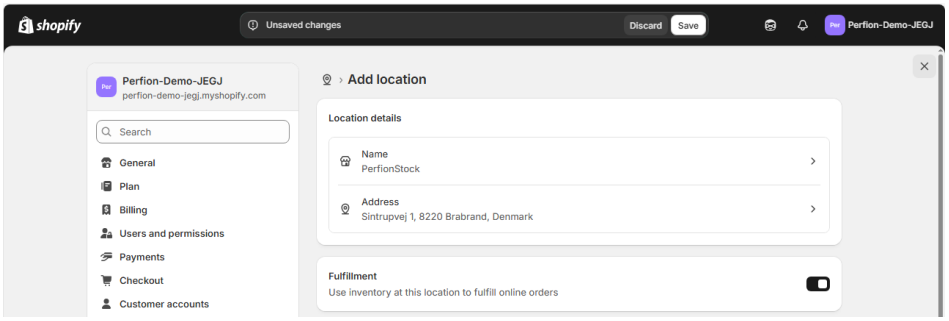


2. Create a Perfion location

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

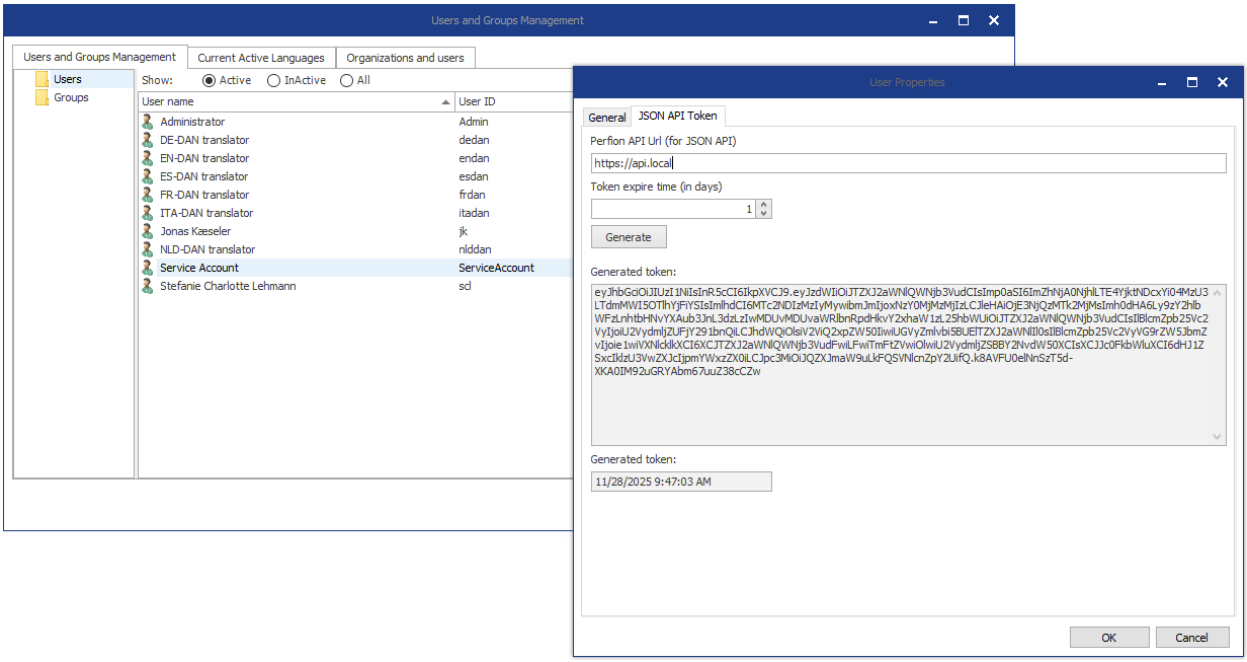


- Name your location *PerfionStock* (make sure to use this name)
- Give it an address
- Click *Save* in the top black header



3. Create a Perfion Token

- In the windows client, select the *Service Account* and generate a JSON API Token for https://api.local
- Copy this token to the same safe place as you copied the Shopify token



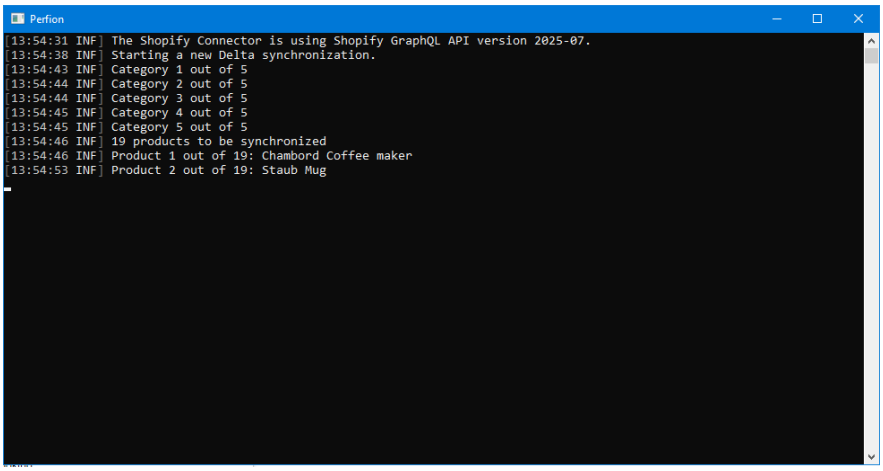
4. Update the Shopify connector settings

- 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

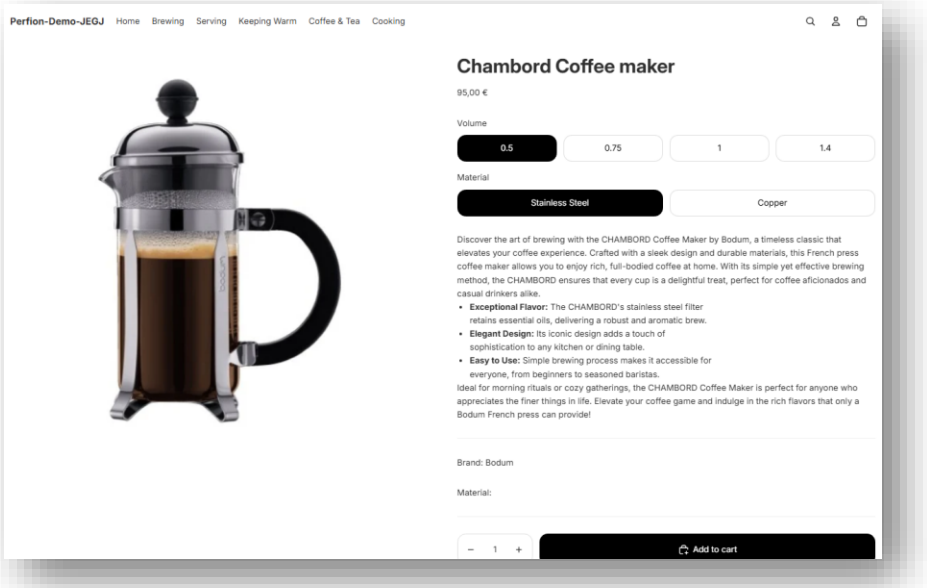


5. Run the connector the first time

- 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 synched to Shopify
    - NOTE: you might see some warnings that IDs exist in Perfion but not in Shopify. That's okay.

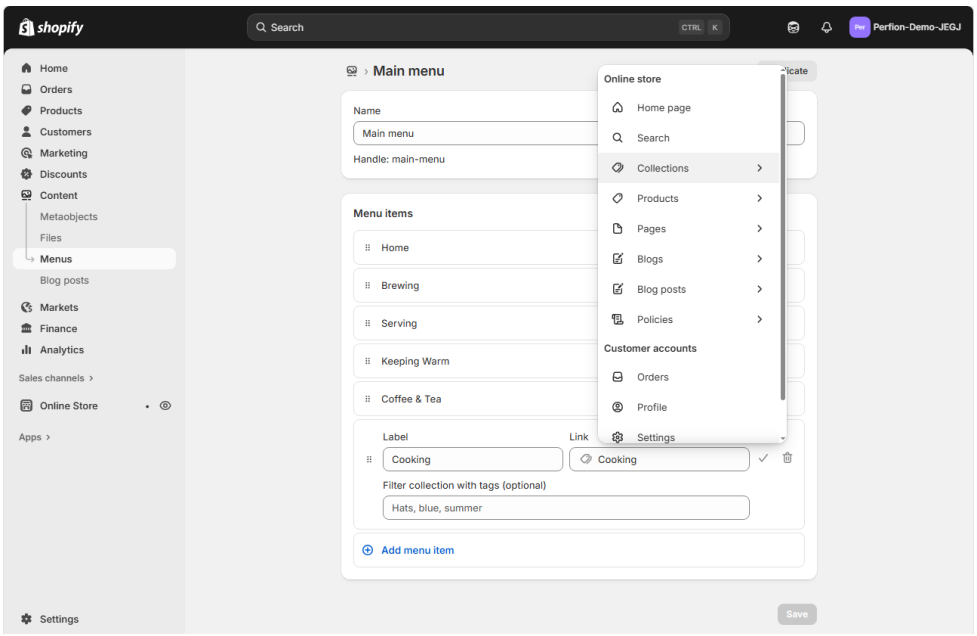


- When done, check Shopify Admin and Store and verify that products have arrived as intended and can be added to cart

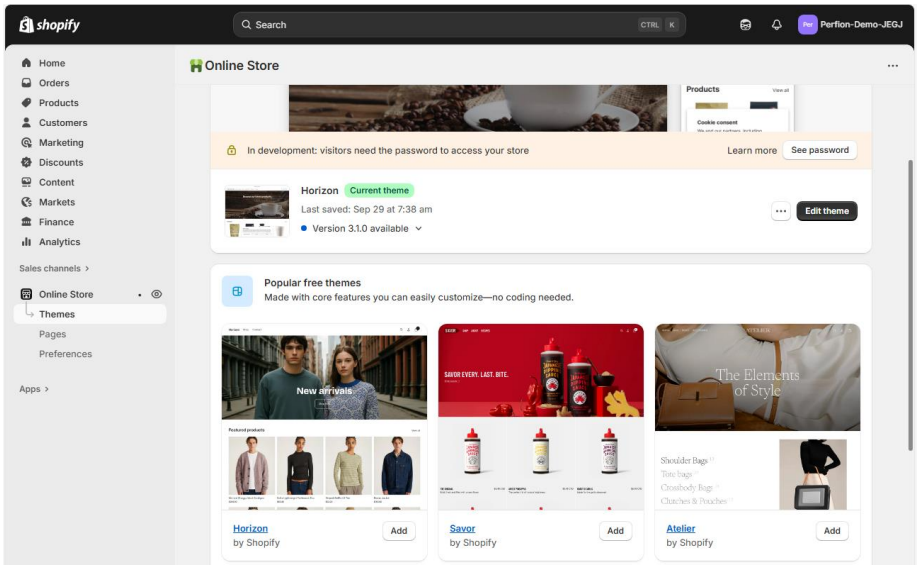


6. Customize Shopify Store front theme

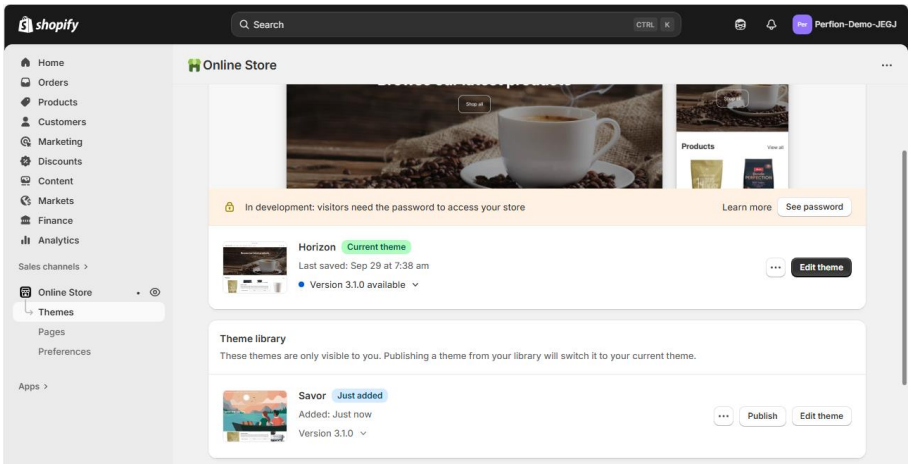
- Go to *Content* -> *Menus* and create menu items as below
- Link each menu item to the corresponding *Collection*
    - Collections are created by the Perfion connector



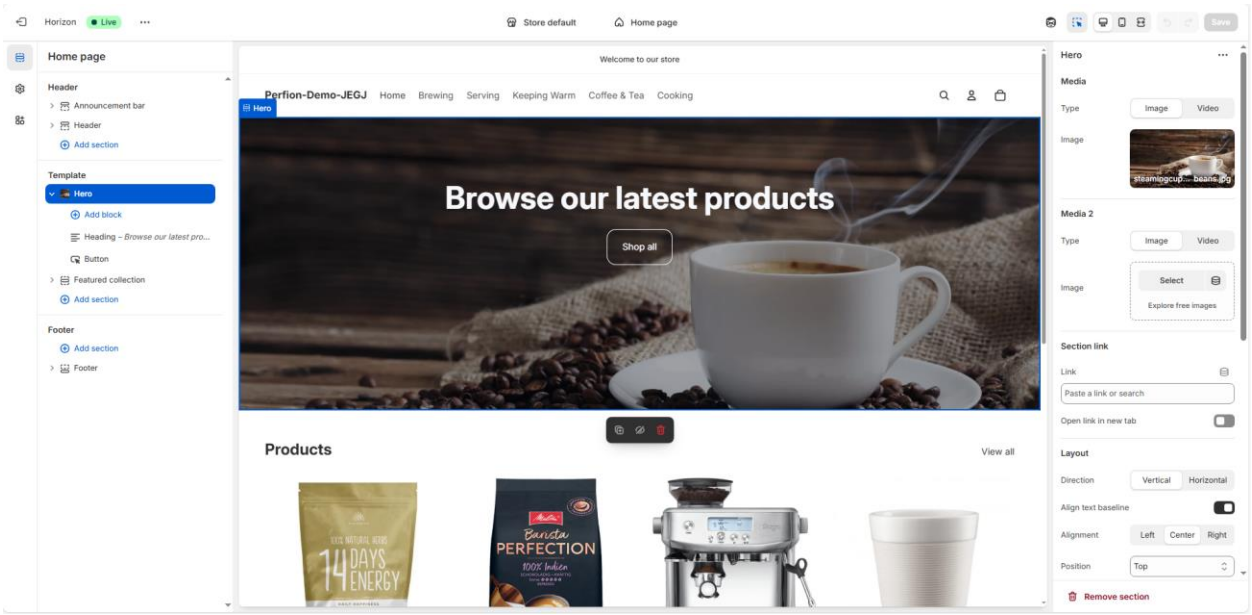
- Click *Online Store* -> *Themes* in left menu
- Under *Popular free themes*, locate *Horizon* and click *Add*



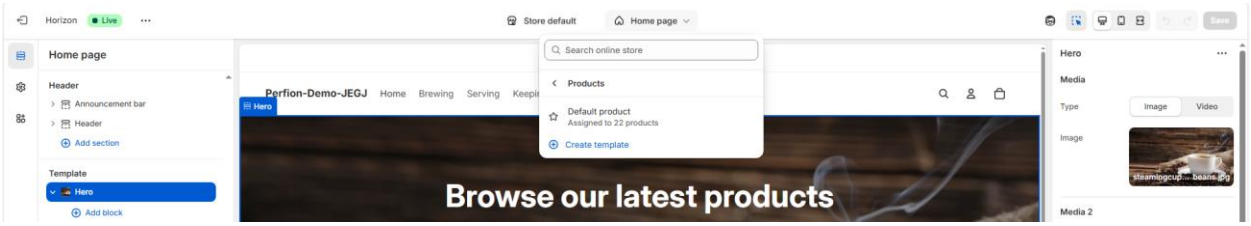
- When installed, find the theme in *Theme Library* and click *Publish*
- Horizon will now appear as your Current Theme



- 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 connnector
- Write *Brand:* and *Material:* in front of placeholders
- Click *Save* and see the result in your store

