

Shopify Connector

imc Learning Suite

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1 Introduction

Shopify (www.shopify.com) is a popular and powerful eCommerce and shopping cart tool which provides extensive functional possibilities, configurable workflows, analytics and options to boost sales by providing the possibilities for things such as discount codes and gift cards.

Shopify is available as a Software-as-a-Service (SaaS) model with various subscription plans. It is a pre-requisite for imc to setup the connection that there is a valid subscription to Shopify running and that the API key details and Call Back URLs from/to the Customer's Shopify instance is provided to imc. Any licence fees related to the Shopify subscription, or configuration of Shopify itself are not covered by imc and need to be organised directly by the Customer.

The imc Shopify Connector provides an interface between the imc Learning Suite and Shopify to allow learners to add courses and learning paths to their basket via the LMS catalogue and check-out via Shopify.

The imc Shopify Connector as part of the imc Learning Suite:

- Intermediates the communication between the imc LMS and Shopify, handling the creation and update of the product catalogue automatically in Shopify with courses from the LMS catalogue
- Allows learners to add courses and learning paths to the shopping cart, based on the price applicable to the learner (preferential prices based on group membership can be defined via the LMS)
- Performs enrolment checks such as prerequisite fulfilment and presents learners with an enrolment form where additional data for the enrolment can be collected
- Allows learners to remove items from their shopping cart
- Allows learners to proceed to checkout with the items in their cart
- Processes the enrolments based on the order payment notifications received from Shopify.

In collaboration with Shopify which:

- Presents the checkout page, and processes the payment
- Informs the imc Learning Suite once a payment has been confirmed successfully
- Set up, and let the learner use discount codes at checkout
- Access sales analytics and reporting
- View a list of all orders
- Configure payment options – Shopify supports 100's of payment providers – see <https://www.shopify.com/payment-gateways>
- Customize the checkout page

Note: imc is not a Shopify expert, we recommend the Customer to consult a Shopify expert from their exchange if they require assistance with configuring Shopify itself further than the technical interface described here in this document. A lot is configurable on the Shopify side (e.g., voucher codes, tax rules, invoice templates, configuration of many different payment processors etc) that can add a lot of value to the Customers process. A lot of documentation and support exists in the online resources and forums of Shopify.

Further this document will describe the configurations and settings needed to establish the imc Shopify Connector successfully.

2 License for the Shopify connector



The Shopify connector is licensed within the imc Learning Suite. All configurations and functions specific to Shopify are only available once the license is active. Furthermore, some configuration activities will be required by imc consulting to finalise the setup.

Note: *In case Shopify is not activated on your system and you require a license for the Shopify connector, please contact your imc account manager.*

3 Learner journey

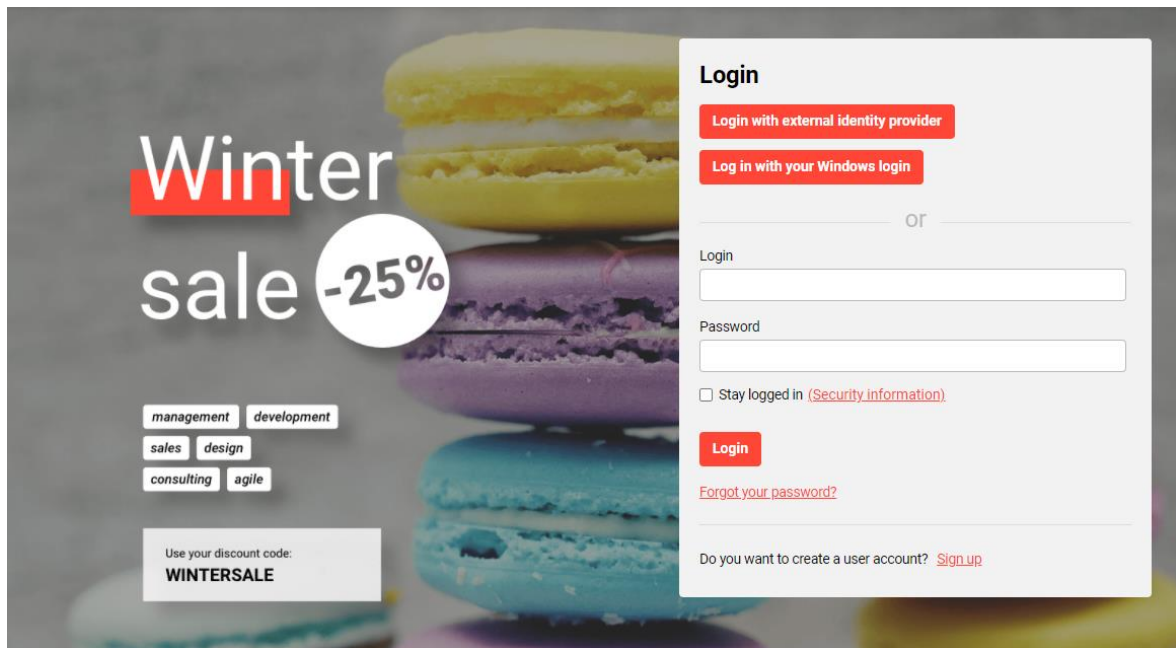


Fig. 3.1: Learner journey.

The learner journey starts in the LMS catalogue. The learner will locate the desired item, add it to the shopping cart or log in first if previously not logged in, and proceeding to the checkout.



Fig. 3.2: Login.

On the checkout page the learner can provide discount codes or gift cards based on the Shopify configuration.

Once the payment is processed, the learner will be redirected to the LMS if such a redirect event is configured on the Shopify side and will be able to access the enrolled courses as soon as the transaction is finalized from the LMS side. This step might take several seconds although usually it is instantaneous.

3.1 Add to cart

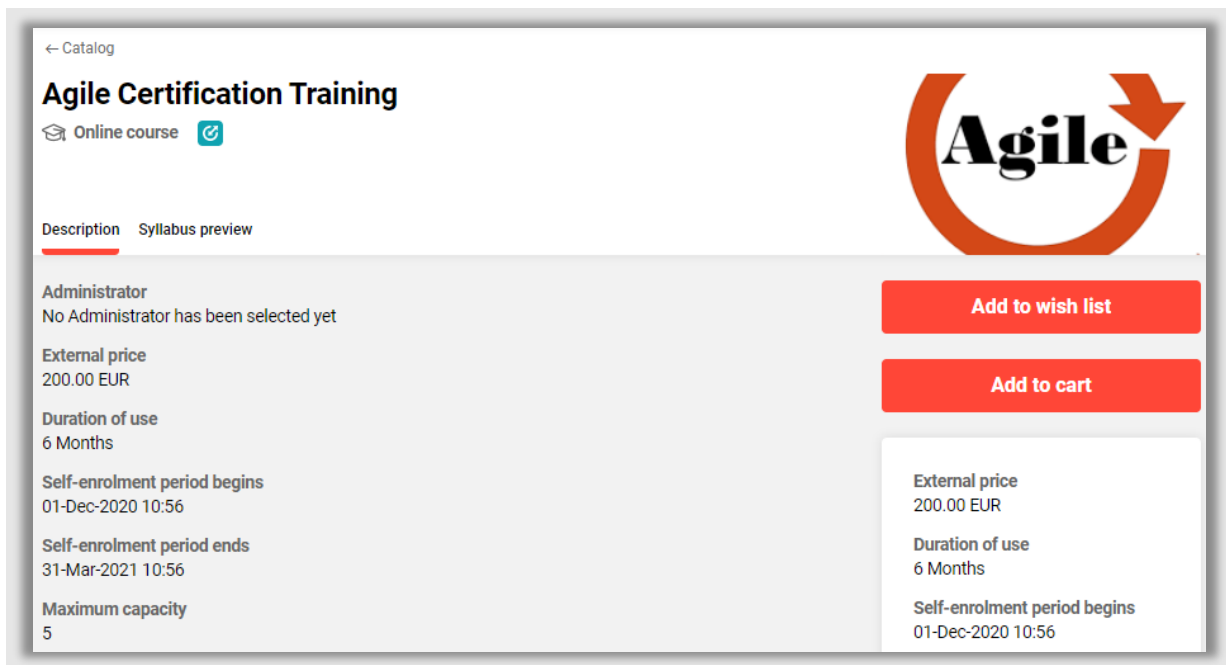


Fig. 3.3: Add to cart.

The add to cart option is presented to the learner in the following conditions:

- The course is marked as Shopify relevant with the meta tag: Send to Shopify
- The enrolment type of the course is "Self-enrolment"
- There are available free places on the course or learning path
- The Self enrolment period ends meta tag value is either not set or is set in the future
- Based on the defined prices, the learner is eligible to pay a price.

Courses available free of charged can be enrolled directly without the need to go via the checkout process.

If the user is already logged in, they can add the item to the cart. As soon as the item is already in the cart, an option to remove from cart is available instead.

If the user is not already logged in, the user will be invited to login in order to add to cart. Once logged in, the user will be redirected back to the item where the add to cart option is available.


To see the current list of items available in the cart, the shopping cat icon can be selected from the top navigation.

3.1.1 Courses inside learning paths

imc supports 2 workflows, for learning paths purchased via Shopify:

Scenario 1: Purchase of a Learning path allows the user to directly access all courses within (for free)

It is possible to configure direct enrolment for some or all the courses in the learning path, in which case the user will be automatically enrolled and will not need to purchase the courses additionally.



Communication Evolution

[Edit](#) [Learning path 135383](#) [End: Dec 21, 2020](#) [saved: Dec 10, 2020](#)

Info

Languages

Description

Syllabus

Classifications

Skills

Administrators

Requirements

Cancellation charges



	Name	Object ID	Type	Book automatically	Language
	Communication Evolution	135390	Learning path		
	Advanced Development	115159	Blended learning	<input checked="" type="checkbox"/>	English (GB) (Administr...

Fig. 3.4: Configuring direct enrolment.

Note: The direct enrolment will only be possible if the user fulfils the prerequisites and there are no other impediments for performing the automatic enrolment.

Scenario 2: User purchases the learning path to get access to courses within. They must then enrol or purchase the courses.

Once a user purchases or is enrolled to a learning path, they must then enrol to the courses in the learning path. It is possible in this scenario to have the courses themselves free of charge i.e. non Shopify relevant.

Alternatively, if the course(s) are also Shopify relevant and has a price, the learner has to add the courses to the cart and purchase.

It is possible to configure direct enrolment for some or all the courses in the learning path, in which case the user will be automatically enrolled and will not need to purchase the courses additionally.

3.2 Enrolment checks

Once the user has decided to add an item to his cart, a series of checks will be performed by the LMS to ensure that the user fulfils the conditions dictated by prerequisite definition or seat allocation. If any of these conditions is not met, the user will not be allowed to add the item to the cart.

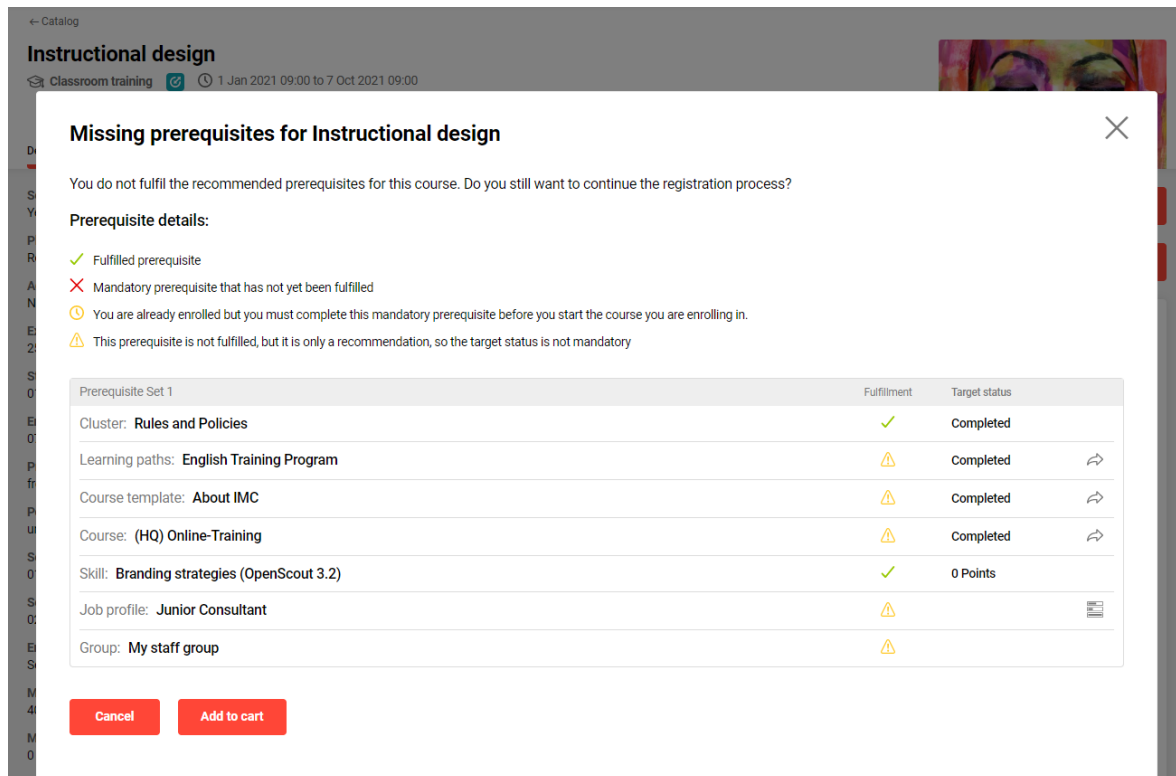


Fig. 3.5: Enrolment checks.

Recommended not fulfilled prerequisites will be displayed to the user with the option to proceed with the purchase.

When there are mandatory prerequisites not fulfilled, the course cannot be added to the cart. The learner will receive the information on the missing prerequisites.

In such a case, the course is not sent to the Shopify cart and no record of the attempt purchase will be recorded in Shopify.

3.3 Enrolment form

When an enrolment form is configured for the course or learning path, the form will be presented to the learner at the time when the learner wishes to add the item to the cart.

The information will be saved in a temporary table until the enrolment is processed.

If the enrolment is not processed within **50 days** after the enrolment data was provided, this data will be removed from the system, to ensure GDPR compliance.

3.4 View the shopping cart

When the shopping cart icon is selected, the current list of items which are available in the user's cart is displayed.

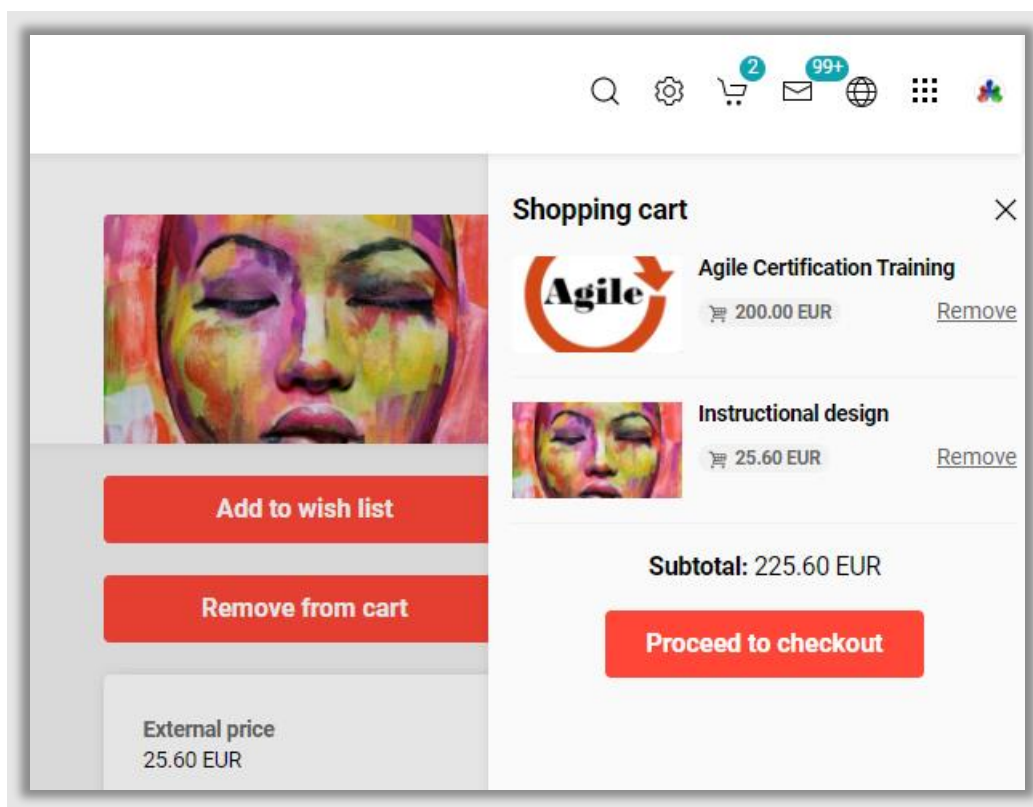


Fig. 3.6: Shopping cart.

The list will show the course title, image (either the one defined for the course if available in Shopify or the default image of the item) and the price with the corresponding currency.

At the bottom of the item list, a subtotal will be calculated, based on the standard price of each item. Further taxes or discounts are only accessible in the next step once the user has proceeded to the checkout page.

Important considerations

The shopping cart list is managed by Shopify and is based on a cookie that lasts 14 days. The time is extended whenever a new item is added to the cart. Due to this fact, the list of shopping cart items will not be accessible if the user decides to open the LMS in a new browser.

Since it is possible that changes occur in the system after the user added certain items to his cart and until they decide to checkout, there is a risk that the enrolment is no longer possible. In such cases, an e-mail will be sent to the administrator, as detailed in section 4.2.2

3.5 Checkout and redirect to LMS

Once the user has selected the “Proceed to checkout” button, they will be redirected to the checkout page where the payment information can be provided.

The screenshot displays the imc checkout interface. On the left, under the 'imc' logo and 'Information > Payment' breadcrumb, there are two main sections: 'Contact information' with an input field for 'Email or mobile phone number' and a checkbox for 'Keep me up to date on news and exclusive offers'; and 'Billing address' with fields for 'First name (optional)', 'Last name', 'Address', 'Apartment, suite, etc. (optional)', 'Postal code', 'City', 'County' (with a dropdown), and 'Country/Region' (with a dropdown set to 'Romania'). A checkbox for 'Save this information for next time' is at the bottom of this section. A blue 'Continue to payment' button is positioned at the bottom right of the form area. On the right side, the cart summary shows two items: 'Agile Certification Training' (Standardpreis / 0) for €200,00 and 'Instructional design' (Standardpreis / 0) for €25,60. Below the items is a 'Discount code' input field with an 'Apply' button. The total amount is displayed as 'Total €225,60'.

Fig. 3.7: Payment information.

Shopify also allows the configuration of this check out page, along with changing the look and feel. If required, such skin design must be handled by the customer on Shopify directly. The imc design applied to the LMS will not automatically be carried over to the Shopify checkout page.

The fields on the checkout page, including the billing and the e-mail address, are controlled by Shopify.

3.6 Order processing

Shopify will inform the LMS about order and orderer and the LMS will proceed to process the required enrolments.

If the order can not be fulfilled entirely, an e-mail will be sent out to the configured administrative e-mail address, informing about the issue and summarizing which items could not be enrolled for the user. The admin will have the possibility to review the orders as part of the Shopify administrative backend and issue a refund accordingly.

Orders are not tracked within the LMS. The LMS only records enrolled courses and learning paths. If an order is not fulfilled in Shopify, no track records will be visible in the LMS.

4 Shopify configuration

4.1 Setting up the Shopify private app

In order to allow the LMS to communicate with Shopify, a Shopify private app must be created.

For this purpose, log in to the administrative backend of Shopify -> navigate to Apps -> Manage private apps.

During this step you will be asked to provide an:

- App name
- The Webhook API version
- Enable usage of Storefront API
- Enable permissions for the Storefront API

Once the private app has been created, the following information will be generated:

- API key
- Password
- Shared secret
- Storefront access token

Please store this information as it will be required in the further step of configuring the LMS.

The following permissions need to be set to Read and Write:

Inventory

Products

Product listings

ADMIN API PERMISSIONS

ACTIVE PERMISSIONS FOR THIS APP

Inventory View or manage inventory across multiple locations Access scopes: read_inventory, write_inventory	Read and write
Product listings View or manage product or collection listings Access scopes: read_product_listings, write_product_listings	Read and write
Products View or manage products, variants, and collections Access scopes: read_products, write_products	Read and write

[Show inactive Admin API permissions](#)

Keep these credentials secure. They provide open API access to your store.

API key
40c6c1ccaa2d9262fa254add5e9e292

Password
..... [Show](#)

Example URL
https://40c6c1ccaa2d9262fa254add5e9e292:shppa_edb4c59c80c57682f33ebbdf
Private applications authenticate with Shopify through basic HTTP authentication, using the URL format
https://{apikey}:{password}@{hostname}/admin/api/{version}/{resource}.json

Shared Secret
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

Secrets are used to [validate the integrity of webhooks](#).

Storefront access token
37bb4a4f11a205447557644ccd9fb307

Storefront API access tokens are not secret. You can place them in a JavaScript file or any public HTML document.

Fig. 4.1: Permission dialogs.

4.2 Creating a Shopify Webhook

A webhook is required to allow Shopify to inform the LMS on the order payment event, which the LMS will need in order to process the enrolment of the user after the purchase.

In order to set up a webhook, you must navigate to the following section in Shopify

<http://yourshop.myshopify.com/admin/settings/notifications>

and create a webhook for Order payment following the example below:

<your LMS URL>/ils/restapi/shopify/webhook/order

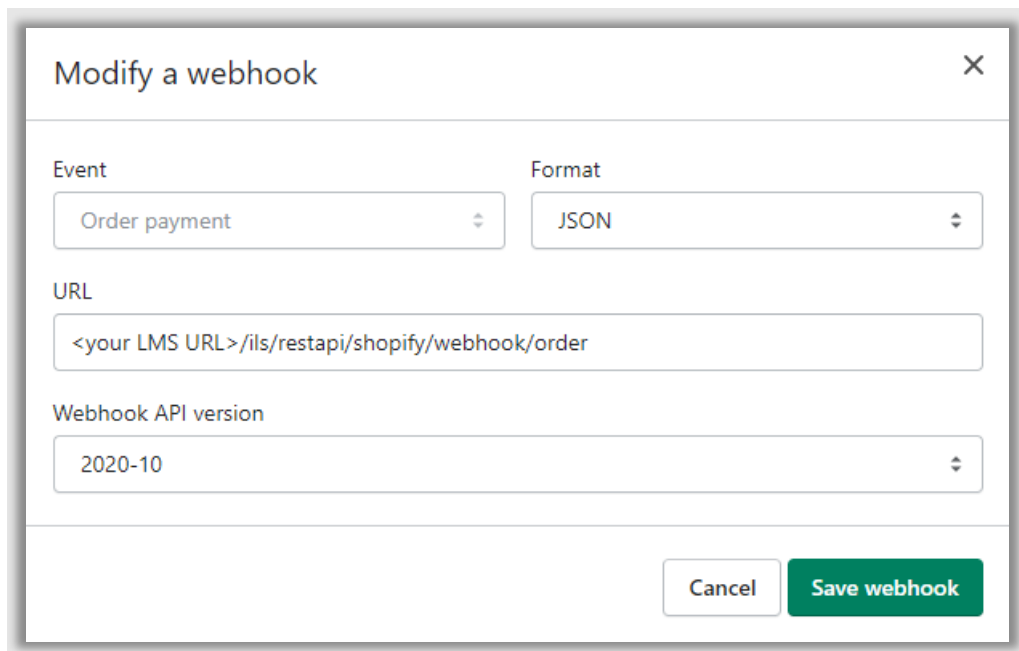


Fig. 4.2: Shopify Webhook.

After the webhook is created, a webhook key will be provided. This value must be added in the API secret field of the LMS configuration.

All your webhooks will be signed with
fe6751a3a34971cf1ea56c041fc24c055db0f274a8404a9092fb59125936d6aa so you can [verify their integrity](#). [🔗](#)

Fig. 4.3: API secret field.

4.3 Setup a redirect URL

Once a transaction has been completed in Shopify i.e. a successful checkout has been processed, the user must be redirected back to the LMS. Shopify allows the configuration of a redirect URL where the user can be taken after the checkout process is complete. This checkout URL **must** be configured by the customer, on the Shopify admin interface:

From the Shopify admin section -> Settings -> Checkout -> Order processing -> Additional scripts

In the field, you can provide the desired return URL.

imc offers two possibilities:

Option 1: Standard url back to the learning area or to any existing dashboard pages in the LMS

e.g. `<script> window.location = "<your LMS URL>/pages/personalarea.jsf"; </script>`

imc recommends a redirect to a dashboard to allow the system the time needed to process the enrolment.

Option 2: Custom feature panel

By using a feature plugin panel, it is also possible to display the order number on an LMS dashboard, in which case the return URL could be:

`<script> window.location="<your LMS URL>pages/new-internal-dashboard.jsf?menuId=<menuId>&locale=en-GB&showbundlekeys=false#/?dashboardId=<dashboardId>&order_id={{order_number}}"; </script>`

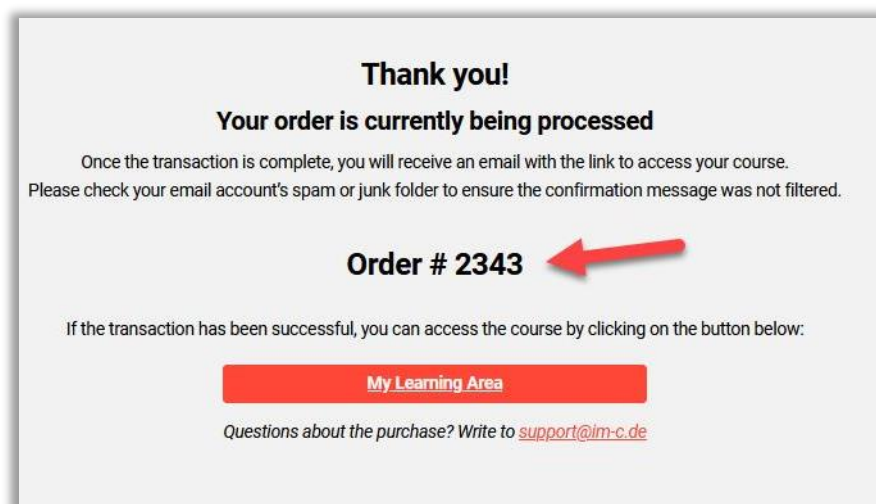
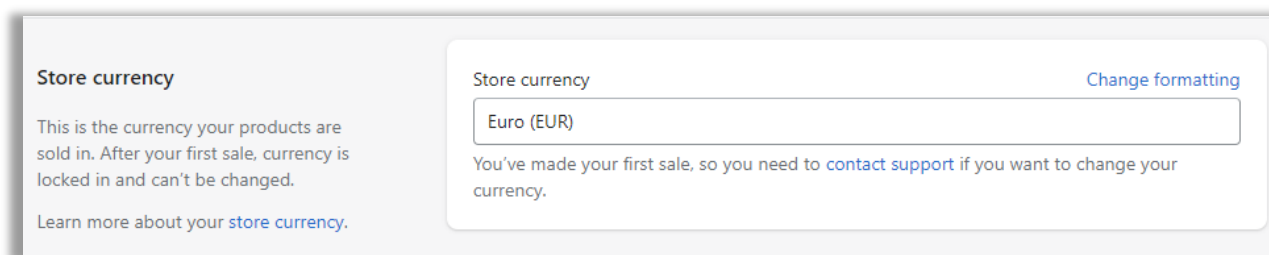


Fig. 4.4: Setup a redirect URL.

Note: The custom feature panel is not included in the standard product and has to be setup separately. Please contact your account manager for an effort estimation.

4.4 Set Shopify language and currency

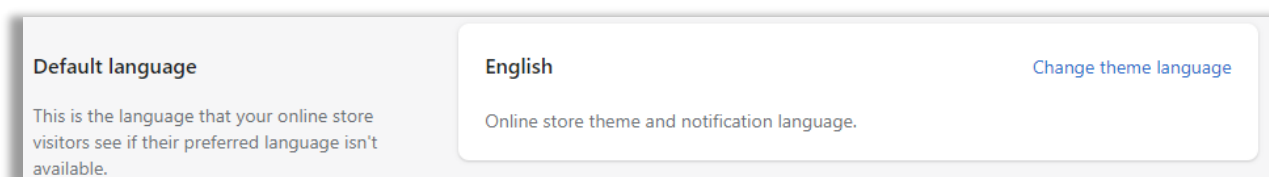
A Shopify shop requires a store currency that can be configured by accessing the General settings: <https://yourshop.myshopify.com/admin/settings/general>



The screenshot shows the 'Store currency' section of the Shopify admin settings. On the left, there is a grey sidebar with the title 'Store currency' and a description: 'This is the currency your products are sold in. After your first sale, currency is locked in and can't be changed.' Below this is a link: 'Learn more about your store currency.' The main content area has a white background and contains a 'Store currency' label, a 'Change formatting' link, a text input field containing 'Euro (EUR)', and a message: 'You've made your first sale, so you need to [contact support](#) if you want to change your currency.'

Fig. 4.5: Shopify currency.

The Shopify language must be set in the languages section: <https://yourshop.myshopify.com/admin/settings/languages>



The screenshot shows the 'Default language' section of the Shopify admin settings. On the left, there is a grey sidebar with the title 'Default language' and a description: 'This is the language that your online store visitors see if their preferred language isn't available.' The main content area has a white background and contains an 'English' label, a 'Change theme language' link, and a description: 'Online store theme and notification language.'

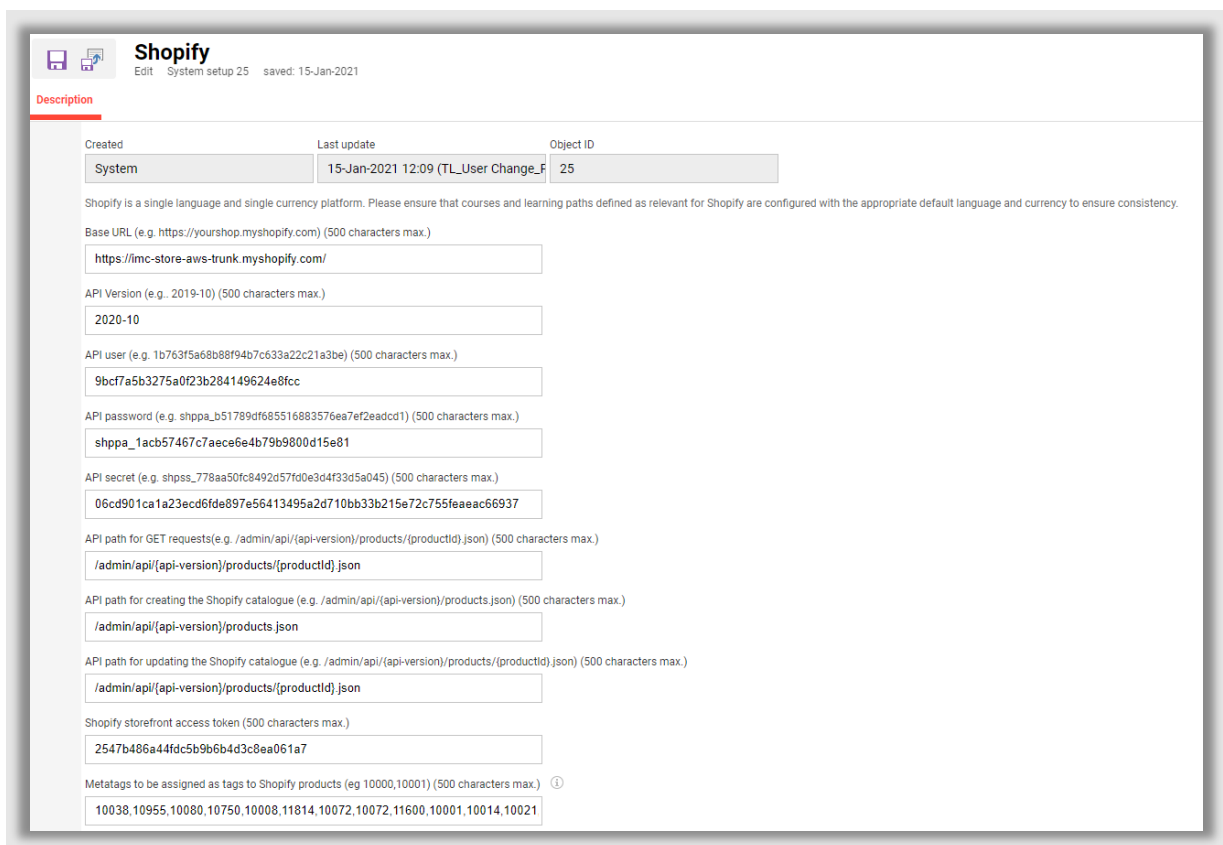
Fig. 4.6: Shopify language.

5 LMS System configuration

5.1 Configuration required to connect the LMS to Shopify

The LMS administrator has the possibility to configure, system-wide, a Shopify shop that the LMS will connect to in order to create, update products and process enrolments.

The information obtained during the Shopify private app setup will be required here in order to connect the two services.



Shopify
Edit System setup 25 saved: 15-Jan-2021

Description

Created	Last update	Object ID
System	15-Jan-2021 12:09 (TL_User Change_F	25

Shopify is a single language and single currency platform. Please ensure that courses and learning paths defined as relevant for Shopify are configured with the appropriate default language and currency to ensure consistency.

Base URL (e.g. https://yourshop.myshopify.com) (500 characters max.)

API Version (e.g., 2019-10) (500 characters max.)

API user (e.g. 1b763f5a68b88f94b7c633a22c21a3be) (500 characters max.)

API password (e.g. 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) (500 characters max.)

API secret (e.g. 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) (500 characters max.)

API path for GET requests(e.g. /admin/api/{api-version}/products/{productid}.json) (500 characters max.)

API path for creating the Shopify catalogue (e.g. /admin/api/{api-version}/products.json) (500 characters max.)

API path for updating the Shopify catalogue (e.g. /admin/api/{api-version}/products/{productid}.json) (500 characters max.)

Shopify storefront access token (500 characters max.)

Metatags to be assigned as tags to Shopify products (eg 10000,10001) (500 characters max.) ⓘ

Fig. 5.1: Shopify configuration.

Base URL – this is the URL of your Shopify shop -> https://yourshop.myshopify.com/

API Version – Specified the Shopify API version used by the LMS. imc has tested the connector with the version 2020-10. Please use the same version unless otherwise specified by imc.

API user – This maps to the API key field from Shopify:

API key



Fig. 5.2: API user.

API password – This maps to the Password field from Shopify:

Password

Show



Fig. 5.3: API password.

API secret – This maps to the Webhook secret

For the API paths, please use the following values explicitly:

API path for GET requests

/admin/api/{api-version}/products/{productId}.json

API path for creating the Shopify catalogue


/admin/api/{api-version}/products.json

API path for updating the Shopify catalogue

/admin/api/{api-version}/products/{productId}.json

Shopify storefront access token will be the value found under the Storefront access token of the Shopify private app.

Storefront access token



Storefront API access tokens are not secret. You can place them in a JavaScript file or any public HTML document.

Fig. 5.4: Access token.

5.2 Additional configuration possibilities

5.2.1 Configuration for additional meta information

As part of the Shopify configuration, a dedicated entry is available to allow adding additional information that should be added to the Shopify product, besides the information that is provided by default, as detailed in Chapter 5.4

An important aspect to be noted is that adding additional information will increase the time needed by the scheduled job to populate the product catalogue.

5.2.2 E-mail address for unprocessed orders

In the event that the LMS is unable to process a paid order, there is a possibility to configure an emergency e-mail address where an e-mail will be sent providing information about which items from the given order could not be process.

In that event, the admin can take action by either issuing a refund from Shopify or contacting the user.

This field is found in the LMS system configuration.

E-mail address for issues related to enrollments (500 characters max.)

Fig. 5.5: Email address field.

5.2.3 Specific meta tag to be used as SKU for the Shopify product variants

Shopify product variants contain an SKU field which can be used for reporting on the Shopify side. With version 14.10 of the LMS, it is possible to define a meta tag to be used as source for the SKU value. Text meta tags are supported here.

Metatag ID to be used as SKU for the Shopify product variant (100 characters max.)

Fig. 5.6: Metatag field.

5.2.4 Vendor name

By providing a vendor name in the dedicated field, the Shopify vendor field will be populated when the product catalogue is generated by the LMS. The vendor name is used as an extra webhook security, ensuring that only requests which provide this value are processed as valid enrolment requests by the LMS.

Vendor name (100 characters max.)

Fig. 5.7: Vendor name field.

5.2.5 Behaviour configuration for courses inside learning paths

When providing learning paths as course bundles for reduced price, it might be desired that once the learning path is purchased, the courses inside can be enrolled without additional cost. A configuration is available to determine if course enrolment from an enrolled learning path should be permitted without asking the user to purchase the course in addition.

6 Populating the Shopify product catalogue

6.1 Meta tag and scheduled job configuration

In order to be able to purchase courses or learning paths via Shopify, the following configurations are required:

- Each course and learning path that is expected to function with Shopify must be labelled with a meta tag and have the planning status *Released*. The meta tag is named "*Send to Shopify (11820)*"
 - Note: this meta tag must be added manually into course types, course templates, courses and learning paths. Additional effort would be required to add the meta tag to any existing objects using scripts.
- Based on this meta tag, a scheduled job will periodically update the Shopify product catalogue
 - CreateOrUpdateShopifyCatalogItemsJob
 - Processor name: de.imc.clix.webservices.client.shopify.job.CreateOrUpdateShopifyCatalogItemsJob
 - This must be configured by imc consulting and the recommendation is to set the cron scheduler to run in alignment with the Solr indexing for the catalogue.
- Once the courses and learning paths have been added as products to Shopify, the products must be made available to the private app so that they can be added to the cart as part of the checkout process. For this step, please navigate to Shopify admin, access "All products"-> select all -> More actions -> Add available channels -> Mark the private app and click "Make products available"

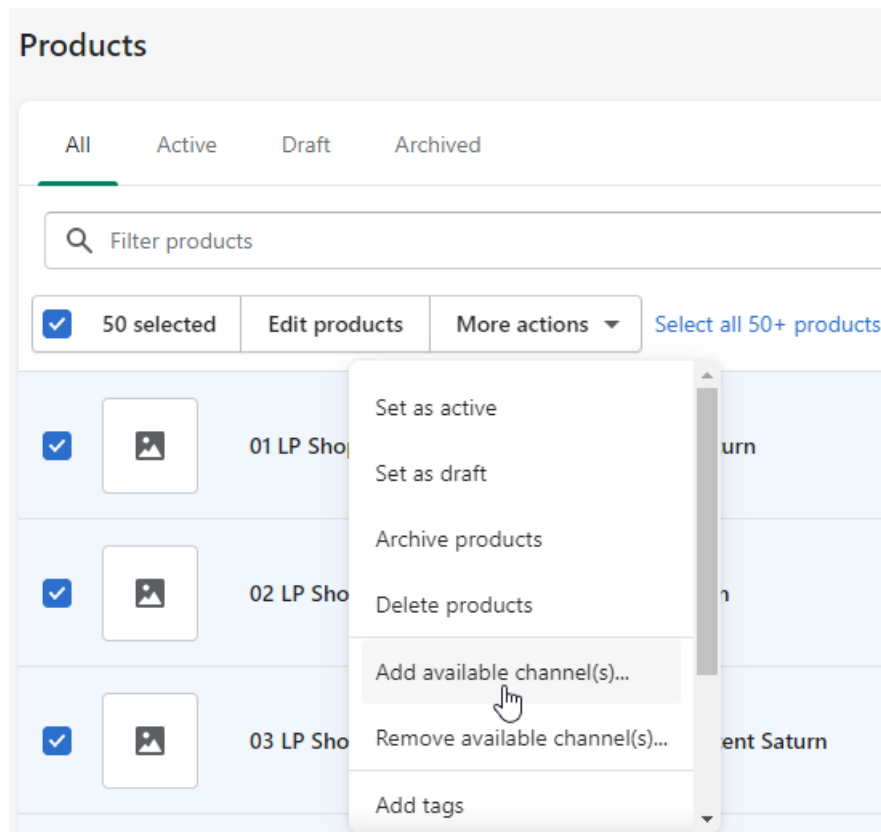


Fig. 6.1: “Add available channel(s)” selection.

Since a Shopify shop has one default currency and one default language, the LMS only supports as part of the connector single language and single currencies. This restriction applies both for creating the product catalogue and also for the checkout process.

The default language and default currency of the item will be used.

The default language is the language marked as Basis on the Language tab of the course. The default currency is the currency specified in the External price meta tag (Id 10128).

Special attention must be given to setting up the correct default currency of an item. The default currency of the item must match the default currency of the Shopify shop, to avoid inconsistencies during checkout.

6.2 Updating the product catalogue

To keep the Shopify available quantity in sync with the number of free places in ILS for a course or learning path, ILS is sending an updated information in case the target status of a participant is changed to cancelled or enrolled. This means that in order to ensure there are no discrepancies, participants should not be completely removed from courses or moved without being first cancelled, respectively the participants should not be added to the course with a status other than enrolled.

In case there is a need to perform such status changes, please ensure that the cronjob is configured to run frequently to maintain the free places consistency.

When a payment is processed and the LMS is notified via the Webhook, the free places are adapted accordingly.

6.3 Default meta information sent to Shopify

By default, the LMS will populate the following metatags from courses and learning paths, to a Shopify product:

- Name (id: 10000)
- Preview image (id 10950)
- Price (See chapter 5.5. for more details on how the LMS handles price information)

For each group specific price, a separate product variant will be created.

Important: To make the image available for Shopify, the image data folder must be accessible publicly. This should be done either by imc if the system is hosted by imc or by the customer if the system is hosted on premise.

6.4 Configuration for additional meta information

As part of the Shopify configuration, a dedicated entry is available to allow adding additional information that should be added to the Shopify product.

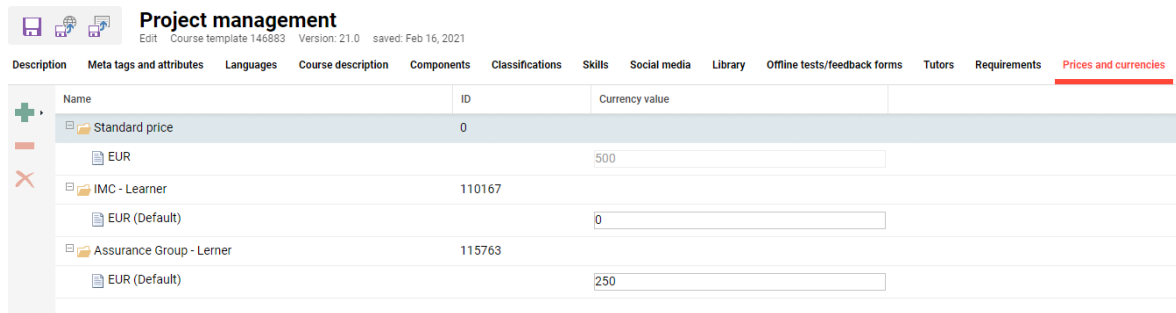
This information is based on meta tags and will be mapped to **tags** in Shopify.

While the LMS does not restrict the usage of any meta tag type, the only supported types are text field and selection lists. Using other meta tag types may result in a different output than expected due to formatting reasons.

An important aspect to be noted is that adding additional information will increase the time needed by the scheduled job to populate the product catalogue.

6.5 Group specific pricing

Within the LMS it is possible to define, for courses and learning paths, different prices for different user groups.



Project management		
Edit Course template 146883 Version: 21.0 saved: Feb 16, 2021		
Description	Meta tags and attributes	Languages
Course description	Components	Classifications
Skills	Social media	Library
Offline tests/feedback forms	Tutors	Requirements
Prices and currencies		
Name	ID	Currency value
Standard price	0	
EUR		500
IMC - Learner	110167	
EUR (Default)		0
Assurance Group - Lerner	115763	
EUR (Default)		250

Fig. 6.2: Group specific pricing.

A standard price based on the External price meta tag will need to be defined. Additional preferential prices can be defined by adding the corresponding user groups and defining the applicable price.

When creating Shopify products based on such courses, a separate variant will be created for each available group.

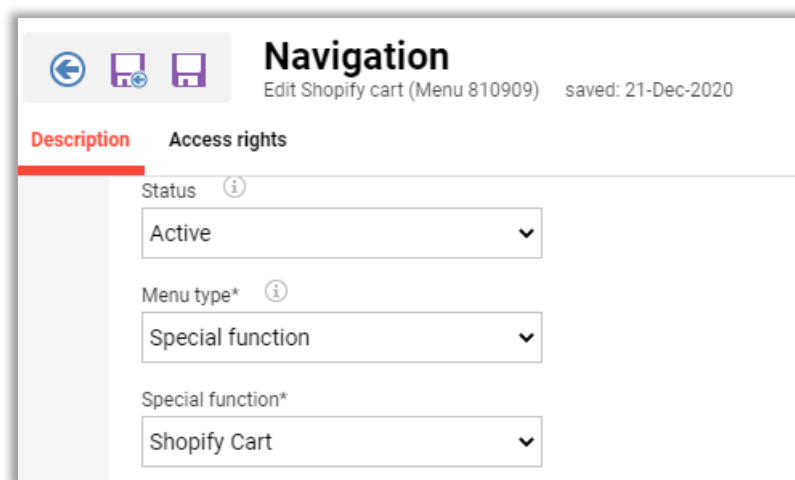
Important – please define prices only in the currency of the Shopify shop. Defining prices in multiple currencies will result in an un-processable product creation in Shopify.

7 Shopping cart navigation item

As part of the configuration in the LMS, a new navigation item must be made available to learners so that they are enabled to monitor the shopping cart list and proceed to checkout.

Note: Please configure the navigation in the **Main navigation for all categories**.

The navigation entry is a special function menu type.



The screenshot shows a web-based configuration interface for a navigation item. At the top, there are three icons: a back arrow, a document with a plus sign, and a document. To the right of these icons is the title 'Navigation' and the text 'Edit Shopify cart (Menu 810909) saved: 21-Dec-2020'. Below the title, there are two tabs: 'Description' (which is active and highlighted with a red underline) and 'Access rights'. The 'Description' tab contains three dropdown menus: 'Status' with the value 'Active', 'Menu type*' with the value 'Special function', and 'Special function*' with the value 'Shopify Cart'. Each dropdown menu has a small downward arrow on the right side.

Fig. 7.1: Shopping cart navigation item.

8 Shopify administrative view

On the Shopify side, besides the creation and management of discount codes, the Shopify administrative backend provides an analytics dashboard that helps monitor sales trends, identify best-selling courses, and enable training providers to identify ways to boost sales.

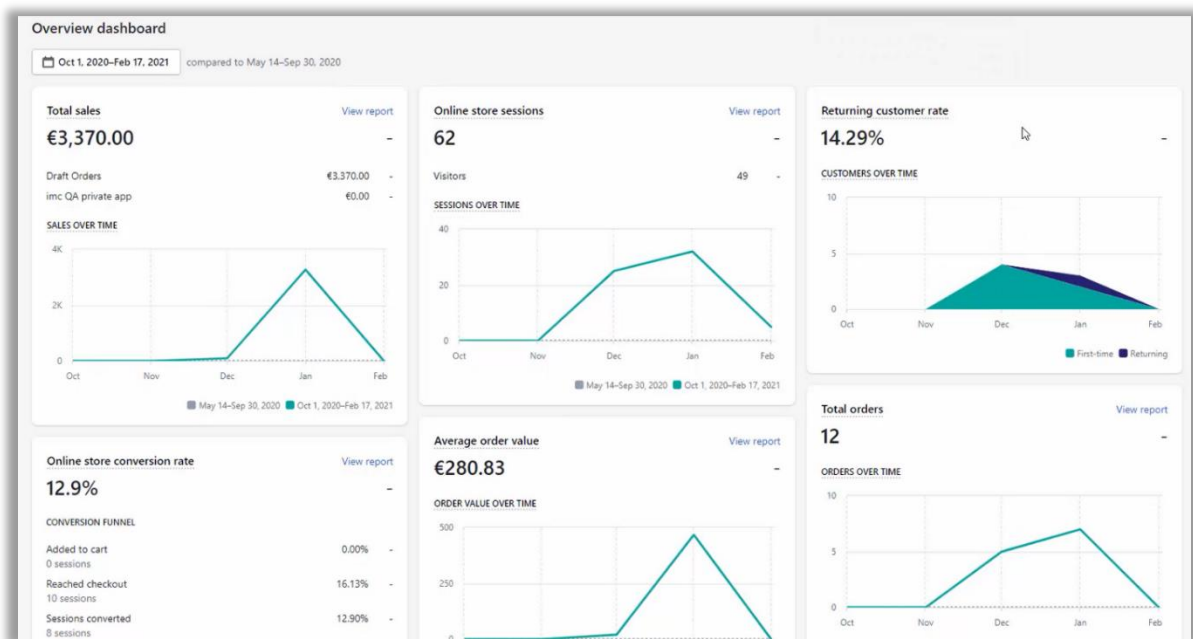


Fig. 8.1: Shopify administrative view.

9 Out-of-Scope

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- The LMS Shopify connector is only supported in a single language and single currencies. Customers are advised to ensure that all courses and learning paths used with Shopify have the same default language and the same default currency as the Shopify shop.
- Booking participants via Easy course creation is not possible for Shopify relevant courses.
- The enhancements described in this document are only applicable for the web application and are not in scope for the native mobile apps.
- Purchasing or enrolling courses by the supervisor for the employees is not in the scope of the enhancement. Where possible, the actions to enrol employees on Shopify relevant courses have been removed.

10 Effects on other components

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No effects on other components.

11 Data migration

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No data migration necessary.

12 Data protection and security

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No impact on data protection and security