



Pre-Woo Integration Plugin — Complete Setup & Configuration Guide

1. Overview

The Pre-Woo Integration plugin connects your WooCommerce store with the Prescribery Dashboard.

It enables seamless product syncing, questionnaire links on the order confirmation page, API communication, and customer account automation. This guide walks through everything needed to configure the plugin end-to-end.

2. Plugin Installation

Follow these steps to install the plugin:

1. Log in to your WordPress Admin Dashboard.
2. Navigate to Plugins → Add New.
3. Click “Upload Plugin” and upload the Pre-Woo Integration ZIP file.
4. Click Install Now → Activate.

Once activated:

- A new setting page appears at WooCommerce → Pre-Woo Integration Settings.
- A new “Dashboard Sync” tab appears inside each product's data panel.

3. Pre-Woo Integration Settings (All Fields Explained)

Navigate to WooCommerce → Pre-Woo Integration Settings and configure:

- External Dashboard Base URL

Example: <https://dashboard.example.com/funnel>

- The base URL of your external funnel/dashboard (no trailing slash).



- Client ID

Example: 3434

- Provided by Prescribery API team. Required to authenticate API calls.

- Source ID

Example: 6933

- Identifies the request source for Prescribery API.

- QB Channel

- Value that must be passed into the “Save Transaction” API during order placement.

- Callback Base URL

Example: <https://xyz.com>

- Your WooCommerce site base URL (no trailing slash).

- Used by the external dashboard when sending callback requests.

- Origin

Example: <https://xyz.com/>

- Must include trailing slash.

- Dashboard uses this for allowed callback origins.

- Enable Log

- When enabled, logs all API requests and responses for debugging.

- API Base URL

Example: <https://xxxxxxx/api/dtg/v1/>



- Base URL for Prescribery Dashboard API (must include trailing slash).

- API Key

- Authentication key provided by the dashboard team.

4. Product-Level Sync Settings

Each WooCommerce product now includes a new tab:

Product → Product Data → Dashboard Sync → Sync with Dashboard

Enable this checkbox for every product that should:

- Sync with the dashboard
- Generate a questionnaire link on the Thank You page
- Participate in API-based sync flows

If disabled, the product will not interact with the Prescribery Dashboard.

5. Mandatory: Create User on Checkout

The option ****Create User on Checkout**** must be enabled for the plugin to function.

Why it is required:

- A WordPress user account is needed for Braintree card tokenization.
- API sync requires a consistent customer ID.
- Questionnaire links and dashboard data depend on a user account.
- Callback flows store and associate tokens with a WP user.



How it works:

1. Customer checks out.
2. If no user exists for the email, plugin creates one automatically.
3. User gets WooCommerce account creation email.
4. Dashboard sync uses this user ID for linking.

This setting must always remain enabled.

6. WooCommerce & Payment Requirements

Ensure the following WooCommerce settings and plugins are correctly configured:

- Braintree by PayPal plugin
 - Required for payment and vaulting support.
- Enable “Save Card / Vaulting” in Braintree
 - Allows storing tokens for dashboard.

- Enable WooCommerce REST API

Steps:

- WooCommerce → Settings → Advanced → REST API
 - Create new API key (Read/Write)
 - Share Consumer Key & Consumer Secret with dashboard team.
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- Must use standard WooCommerce checkout & Thank You page
 - Plugin hooks into the Thank You page to show the questionnaire link.



7. Order Flow (How the Plugin Works)

When a customer places an order:

1. Plugin checks if the product has “Sync with Dashboard” enabled.
2. If yes, plugin sends order + customer data to Prescribery Dashboard API.
3. QB Channel, Client ID, Source ID, and product data are included.
4. On Thank You page:
 - A questionnaire link is displayed for each synced product.
5. Dashboard may perform a callback to your site using Callback Base URL.
6. If logging is enabled, request and response data are stored for debugging.

8. WP Affiliate Plugin Support

The Pre-Woo Integration plugin fully supports WP Affiliate plugins.

- Referral tracking continues as usual.
- Commissions are calculated based on WooCommerce order totals.
- Product syncing and API flows do not interfere with affiliate processing.

9. Pre-Go-Live Checklist

Before launching, verify:

- ✓ Pre-Woo Integration plugin installed and activated
- ✓ All fields in the settings page configured correctly
- ✓ WooCommerce REST API keys generated and shared
- ✓ Braintree payments enabled and “Save Card” enabled



- ✓ Standard WooCommerce Thank You page in use
- ✓ Product Sync with Dashboard enabled for required products
- ✓ “Create User on Checkout” is enabled (mandatory)
- ✓ Test order successfully syncs with dashboard

10. Support & Troubleshooting

If something is not working:

- Enable Logs in plugin settings
- Place a test order
- Review the logs for API request/response
- Confirm the dashboard credentials (Client ID, Source ID, API Key)
- Ensure the product has Sync with Dashboard enabled
- Confirm Braintree vaulting is enabled
- Ensure the REST API keys are active

Share logs with the dashboard technical team when needed.