Shopify Prescribery Integration

Overview

This document outlines the functionality and data flow of the custom Shopify app developed to integrate post checkout patient questionnaires with the Prescribery platform. The solution ensures that customers are prompted to complete a questionnaire only when required, based on the products they purchase.

Custom Shopify App

We have developed a **custom Shopify app** that is installed directly on a client's Shopify store. The app is responsible for identifying eligible products, generating questionnaire links, and coordinating with Prescribery to activate and store patient responses.

Product Level Metafield

The app introduces a product level metafield:

- **Metafield name:** requires_questionnaire

- **Type:** Boolean (true / false)

This metafield determines whether a questionnaire is required for a product.

- If requires_questionnaire = false → No questionnaire is triggered.

- If requires_questionnaire = true → A questionnaire is required after checkout.

Checkout & Post Purchase Behavior

When a customer places an order:

- The app checks all products in the checkout.

- If **any product** has requires_questionnaire = true, a questionnaire link is generated.

Questionnaire Link Display

The questionnaire link is displayed in two places:

1. **Thank You Page** (Order Confirmation Page)

2. **Order Confirmation Email**

This ensures the customer has multiple opportunities to access and complete the questionnaire.

Prescribery Token Activation

Once the questionnaire link is generated:

- The app sends an API request to **Prescribery Dashboard**.

- A unique token associated with the order is stored.

- The questionnaire link is marked as **active** and usable by the customer.

Questionnaire & Patient Chart Creation

When the customer accesses the questionnaire link:

- The questionnaire dynamically loads based on the **products ordered**.

- The customer completes the required medical questionnaire.

- Upon submission:

  - A **patient chart** is automatically created in Prescribery.

  - The responses are linked to the corresponding patient.

Subscription Orders Handling

For **subscription-based orders**, a different trigger mechanism is used.

Shopify Flow Automation

- A **Shopify Flow** automation is configured at the store level.

- When a subscription order event occurs:

    - Shopify Flow executes an **HTTP request** to Prescribery.

    - The token is saved in Prescribery.

    - The questionnaire link is activated, similar to one-time purchases.

This ensures subscription orders follow the same questionnaire workflow even when standard checkout triggers are bypassed.

Summary

- A custom Shopify app manages questionnaire eligibility using a product metafield.

- Questionnaire links appear on the Thank You page and order confirmation email.

- Tokens are stored and activated via Prescribery API calls.

- Questionnaires are product aware and generate patient charts in Prescribery.

- Shopify Flow is used to handle subscription orders reliably.

This implementation ensures a seamless and compliant post purchase medical questionnaire workflow for both one time and subscription purchases.