

# Process Document for Marqii x OLo Integration Setup

This document outlines the process for setting up customers with the Marqii x OLo integration, intended for use by our clients and onboarding team.

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## 1. Assigning the Project Owner

- **Project Owner Role:** Marqii must assign a contact (the 'Project Owner') to manage the integration on behalf of the customer. The customer will provide contact information for the intended Project Owner to Olo when they reach out. This Project Owner is responsible for setup and information access through the Olo Developer Portal.
    - **Contact:** The Project Owner should ideally be someone on the Customer Experience (CX) team who handles the customer onboarding or a shared user across the CX team.
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## 2. Customer Request Initiation

- **Customer Interest:** When a customer expresses interest in the Marqii x OLo integration, they need to reach out to their Olo representative (likely their Customer Success Manager or Account Manager) and let them know that "We want the Marqii integration". Additionally, they should provide contact information for the intended Project Owner.
    - **Requirements:** The customer should request:
      - **Vendor Export (Read-Only) Access**
      - **Read-only access to the Ordering API's Restaurant & Menu endpoints and Vendor Exports**
      - **Access to 86'd Items Endpoint**
  - **Customer Action:** The customer must obtain the aforementioned from their OLo representative, as Marqii requires them to initiate the integration in the Back Office.
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## 3. Verification of Setup in OLo Developer Portal

- **Project Confirmation:** Olo will create a project for the customer in the Olo Developer Portal. The Project Owner can verify that the setup is ready to proceed by logging into the portal and confirming the customer's name appears in the Projects section.
    - Once this is confirmed, Marqii can begin backend setup.
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## 4. Backend Setup in Marqii Back Office

- **Access Project in Olo Developer Portal:** (Appendix A)
    - Open the customer project in the Olo Developer Portal
    - Navigate to the **API Keys** tab and copy the **Client ID** and click on **Show Secret** to reveal the **Client Secret**.
      - Select these from the **Production Environment** row **NOT** the **Sandbox Environment** row
  - **Adding New Olo Integration to Account in Marqii Back Office:** (Appendix B)
    - **'Group Name'**: Create a unique, descriptive group name (e.g., customer name) for the integration.
    - **'Client ID'**: Comes from Olo Developer Portal (see previous step).
    - **'Client Secret'**: Comes from Olo Developer Portal (see previous step).
    - **Vendor ID Setup**: This is typically the customer's specific restaurant. The onboarding team should reach out to the Marqii Engineering Team (e.g., Marcos) to acquire this ID.
  - **Additional Requirements:**
    - **Location ID**: If the customer requires hours syncing, ensure the Location ID for the Marqii account is added.
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## 5. Webhook Setup for Real-Time Sync

- **Webhook Shared Secret:**
  - If the customer wants Marqii to sync menus or hours in real-time when changes occur, a webhook integration must be established between Marqii and Olo.
  - **Webhook Process:**
    - Marqii provides its Webhook URL to the customer.
    - The customer supplies this Webhook URL to Olo.
    - Olo configures the Webhook and provides Marqii with a **Shared Secret ID** to set this up.

## Appendix A: Olo Developer Portal

\*Please note that in this screenshot the **Sandbox** environment row is shown and that the data in this row SHOULD NOT be selected. We want to select the data in the **Production** environment row\*

Select project: Marqii - Exploration

Project Details | Project Users | API Keys | IP Safelist

Name	Key	Client Id	Client Secret	Environment	Client Platform	Date of creation
Default sandbox key	[Redacted]	[Redacted]	Show secret	Sandbox	ThirdParty	3/6/2023 7:25:33 PM

All content contained within the Olo Developer Portal is bound by the [Terms of Service](#). [Click here](#) to learn more about Olo.

## Appendix B: Add New Integration Marqii Back Office

### Add New Integration ✕

- Menus enabled
- Hours enabled
- Hide all images
- Hide all modifiers
- Hide all descriptions
- Obey Item availability

**Group Name \***

**Webhook Shared Secret**

**Client Id \***

**Client Secret \***

	<b>Vendor Id *</b>	<b>Location Id</b>	
1.	<input type="text"/>	<input type="text"/>	<span>✕</span>

+ Add Vendor

📄 Create Account Integration