Data Source Credentials — Setup Guide

Guild Capital Portfolio KPI Portal • April 23, 2026

This guide lists every data source the KPI portal connects to, and exactly what each portfolio brand needs to do to grant access. Send the requested credentials securely (see **How to deliver credentials** at the end) — once received, brand goes live within 24–48 hours.

Two paths — pick whichever is easier per brand

Option A — Send credentials. Follow the per-source steps below to generate API tokens, OAuth grants, and IDs, then deliver them securely.

Option B — Invite `landon@daytanalytics.com` as a user on each platform with the role noted in each source card. This skips the credential exchange entirely — we use our own session to fetch what we need.

> **Why Option B is often better:** when something looks off in the dashboard later (a missing day, a number that doesn't match a brand's internal report, a new ad account that needs adding), Landon can log in and audit data quality directly — no back-and-forth, no waiting on the brand to pull a screenshot or rotate a token. It also makes onboarding new metrics or campaigns much faster.

Quick reference

Source	Type	What we need	Who sets up
Shopify	API	Admin API access token	Store owner / staff with app permissions
Meta Ads (incl. Instagram)	API	System User token + Ad Account ID(s)	Business Manager admin
TikTok / TikTok Shop	API	OAuth grant + advertiser ID + seller ID	Ads + Shop account owners
Amazon Seller Central	API	SP-API refresh token (LWA OAuth)	Seller Central account admin
Google Ads	API	Customer ID + MCC link OR OAuth	Google Ads admin
Survicate	API	Workspace API token	Survicate workspace admin
Platforms (Walmart / Target / Faire / QVC)	CSV	Periodic CSV export uploaded via portal	Brand ops lead
Wholesale / B2B orders	CSV	Order export uploaded via portal	Brand ops / sales lead

API data sources

1. Shopify

API

What we need:

- Admin API access token (starts with `shpat_`)
- Store URL (e.g. `brand-name.myshopify.com`)

STEPS

1. Log in to **Shopify Admin** as the store owner.
2. Go to **Settings → Apps and sales channels → Develop apps** (you may need to *Allow custom app development* first).
3. Click **Create an app** → name it `Guild KPI Portal` → assign **Landon Colvig** as developer.
4. Open the **Configuration** tab → under **Admin API access scopes**, enable:

   `read_orders` `read_products` `read_customers` `read_inventory` `read_reports` `read_discounts` `read_marketing_events` `read_subscription_contracts` `read_returns` `read_fulfillments`

5. Click **Save** → **Install app**.
6. Click **Reveal token once** and copy the `shpat_...` string.
7. Send the token + store URL via **1Password share** (see secure delivery section).

Option B (recommended for ongoing audits): Settings → Users and permissions → **Add staff** → `landon@daytanalytics.com`. Permissions: *Orders, Products, Customers, Reports, Apps and channels (View)*. We'll create the Admin API app ourselves.

2. Meta Ads (includes Instagram)

API

What we need:

- System User access token (long-lived, never-expiring)
- Ad Account ID(s) — format `act_1234567890`
- Instagram Business Account ID(s)

STEPS

1. Open **Meta Business Suite** → **Business Settings** (gear icon).
2. **Users → System Users → Add**. Name: `Guild KPI Portal`. Role: **Admin**.
3. Click the new system user → **Generate New Token**. Choose your app (or create one if needed) → pick scopes:

   `ads_read` `ads_management` `business_management` `read_insights` `instagram_basic` `instagram_manage_insights` `pages_read_engagement`

4. Token Type: select **Never** (long-lived, doesn't expire).
5. Copy the access token immediately (Meta only shows it once).
6. Back in Business Settings → **Accounts → Ad Accounts** → pick each ad account → **Add People** → assign the new system user as Admin.
7. Repeat for **Accounts → Instagram Accounts** if you want IG metrics.
8. Send the token + ad account IDs + IG account IDs via 1Password share.

Option B (recommended for ongoing audits): Business Settings → **People → Add** → `landon@daytanalytics.com` → **Admin access**. Then assign the user to each Ad Account and Instagram Account. We'll generate our own system user token from there.

3. TikTok / TikTok Shop

API

What we need:

- **For TikTok Ads:** OAuth grant on our app + advertiser ID
- **For TikTok Shop:** Seller authorization on our partner app + seller ID

STEPS — TIKTOK ADS

1. We send you an OAuth link that looks like `https://business-api.tiktok.com/portal/auth?app_id=...` .
2. Open the link while signed in to your **TikTok for Business** account.
3. Approve the requested scopes (`ads_read` , `reporting_read`).
4. You'll be redirected to a confirmation URL containing an `auth_code` . Copy and send to us.
5. Find your advertiser ID under **Assets → Account Info** in Ads Manager and send it.

STEPS — TIKTOK SHOP

1. We send you a Shop authorization link.
2. Sign in to **TikTok Shop Seller Center** and approve.
3. Send your **Shop ID** (visible at the top of Seller Center after approval).

Option B (recommended for ongoing audits): In **TikTok Ads Manager** → **Account Setup → User Management → Invite User** → `landon@daytanalytics.com` , role **Admin** or **Analyst**. In **TikTok Shop Seller Center** → **Account → Member Management → Invite** with **Operations** or **Admin** role.

4. Amazon Seller Central

API

What we need:

- SP-API refresh token (LWA OAuth)
- Seller ID (e.g. `A1XYZ...`)
- Marketplace IDs (e.g. `ATVPDKIKX0DER` for US)

STEPS

1. Log in to **Seller Central** as the primary account holder.
2. Open the OAuth link we send you (format: `https://sellercentral.amazon.com/apps/authorize/consent?application_id=...`).
3. Review the requested scopes → click **Authorize**.
4. You'll be redirected to a URL containing an `spapi_oauth_code` . Copy and send to us — we exchange it for the long-lived refresh token on our end.
5. Send your **Seller ID** (Settings → Account Info → Your Merchant Token).
6. Confirm which marketplaces you sell on (US, CA, UK, etc.) so we configure the right endpoints.

Roles required: Pricing, Inventory and Order Tracking, Brand Analytics, Finance and Accounting, Direct-to-Consumer Shipping. We request these in the OAuth scope.

Option B (recommended for ongoing audits): Seller Central → **Settings → User Permissions → Add a New Seller Central User** → `landon@daytanalytics.com` . Grant **View & Edit** on Reports, Orders, Inventory, Advertising, and Brand Analytics. We then complete the SP-API setup ourselves and skip the OAuth code exchange.

5. Google Ads

API

What we need (easiest path):

- Your Google Ads **Customer ID (CID)** — format `123-456-7890`
- Acceptance of an MCC invite from us

EASY PATH — MCC LINK

1. Send us your CID (top-right of Google Ads UI).
2. We send an invitation from our MCC `Dayta Analytics – Guild Capital Portfolio`.
3. You accept under **Tools & Settings → Account Access → Managers → Pending invitations**.
4. Done — no token exchange needed.

ALTERNATIVE — DIRECT OAUTH

1. Open the OAuth URL we send you and grant `adwords` read scope.
2. Copy the redirect URL with `code=...` and send to us.
3. Send your CID.

Option B (recommended for ongoing audits): Tools & Settings → **Account Access → Users → +** → invite `landon@daytanalytics.com` with **Admin** or **Standard** access. From there we can verify spend, conversions, and attribution directly when something looks off in the dashboard.

6. Survicate (NPS)

API

What we need:

- Workspace API token
- Workspace name / slug

STEPS

1. Log in to **Survicate** as workspace admin.
2. Click your profile (bottom-left) → **Settings → API**.
3. Click **Generate new API key** → name it `Guild KPI Portal`.
4. Copy the token and send via 1Password share.
5. Send your workspace slug (visible in the URL: `app.survicate.com/<workspace>/...`).

Option B (recommended for ongoing audits): Settings → **Team → Invite member** → `landon@daytanalytics.com` with **Admin** role. We then generate the API token ourselves and can spot-check NPS responses directly when reconciling rolling averages.

CSV-based sources

No credentials required — data is uploaded through the portal's admin tab once it's live. The brand designates someone to drop CSV exports into the upload dropzone (weekly recommended).

7. Platforms (Walmart, Target, Faire, QVC)

CSV UPLOAD

Required CSV columns:

- `date`, `platform`, `order_id`, `sku`, `qty`, `gross_revenue`, `net_revenue`

Each platform's standard order export will work — brand maps columns to the template once during onboarding, then drops new exports into the same template.

8. Wholesale / B2B orders

CSV UPLOAD

Required CSV columns:

- `date` , `customer` , `po_number` , `sku` , `qty` , `unit_price` , `net_amount`

Most ERP / order management systems can export this directly. Recommended cadence: weekly.

How to deliver credentials

Preferred: 1Password shared vault (we send an invite). All tokens, OAuth codes, and API keys go in the vault — never in email, Slack, or plain Upwork messages.

Acceptable channels

- **1Password shared vault** — preferred for all secrets
- **Encrypted file via Upwork attachment** — e.g. password-protected ZIP, password sent separately
- **Email for non-sensitive only** — account IDs, customer IDs, store URLs (these alone are not credentials)

Never send via: plain Slack message, plain text email, SMS, or unencrypted Upwork message. Any token sent over those channels will be rejected and you'll be asked to rotate it.

Timeline expectations

- **Brand setup time per source:** 5–15 minutes for most (Shopify, Meta, Google, Survicate). Amazon SP-API can take 30–45 minutes.
- **Total onboarding per brand:** ~2 hours of brand-side effort if all credentials are gathered in one sitting.
- **Time-to-live per brand:** Within 24–48 hours of receiving credentials, all data flowing into BigQuery and dashboards rendering.
- **Credential rotation:** Recommended every 90 days. We'll request rotation via the same secure channel.