Inhoudsopgave

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1. Purpose of this document

This user guide describes how to setup the connection to the Shopify Shops and how to synchronize data and the complete order processing flow.

2. Shopify Connector Setup

2.1 Shopify

2.1.1 Create Shopify Account

Create a new Shopify Account or sign up for a free 14-day trial at https://www.shopify.com/.

More information about how to create and personalize your Shopify store can be found at https://help.shopify.com/.

2.1.2 Configure Shopify Account

2.1.2.1 Create API credentials

In order to allow Microsoft Dynamics 365 Business Central to securely connect to Shopify, you need to create credentials in Shopify that Microsoft Dynamics 365 Business Central will use to connect to Shopify.

Follow the steps below to create the credentials:

- Log in to the Shopify Admin page of your store e.g.: https://<storename>.myshopify.com/admin
- In the menu on the left, click “Apps”
- In the middle below, click “Manage private apps”
• Click “Create a new private app” in the top right corner

Create a new private app

• Enter a title for the app and set the permissions. When finished, click “Save” in right corner at the bottom.
• When you return to the overview of the Private apps, the API Key and Contact email will be shown. This information will be used later on in the setup of Microsoft Dynamics 365 Business Central.

2.2 Shopify POS

2.2.1 Create Shopify POS Account

Create a new Shopify Account or sign up for a free 14-day trial at [https://www.shopify.com/pos/software](https://www.shopify.com/pos/software).

More information about how to create and personalize your Shopify store can be found at [https://help.shopify.com/](https://help.shopify.com/).
Remark: ‘Your store name’ is the name of the Shopify store you created.

2.3   Microsoft Dynamics 365 Business Central

2.3.1   Shopify Connector Setup

This section describes the Shopify Connector Setup in Microsoft Dynamics 365 Business Central

- In Microsoft Dynamics 365 Business Central go to the Shopify Connector Setup page

The setup wizard will start:
**SCAPTIFY REGISTRATION**

**WELCOME TO THE SCAPTIFY CONNECTOR REGISTRATION**

You can register the Scaptify Connector to connect your Shopify store with Dynamics 365 Business Central.

**LET'S GO!**

Choose Next so you can register the Scaptify Connector.

- Click Next on the welcome page.
- Complete your company information and click next.
When you finish the wizard, the license key will be created.
SCAPIFY REGISTRATION

THAT’S IT!
Choose Finish to save the Scaptify Connector setup.

- You can consult your license key and restrictions in the Shopify Connector Setup page.
2.3.2 Setup Shops

From the Shopify Connector Setup, you can create a connection to your Shopify Shops.

- Open the Shopify Shops page via Home > Navigation > Shops
- Create a new shop via ‘New’.
Connector

Connector Info

License Key: 52a4c5a6-75ad-42b7-9035-a5...
Version: 15.6.0.0

Partner

Restrictions

• Or follow the path ‘Scaptify > Shops’

SCAPTAPOC

New  Synchronization  |  Actions  Navigate  Fewer options

General

Code: SCAPTAPOC
Shopify URL: https://scaptapoc.mysopify.com/
API Key: 25b02522f4f57681cfd3d1e7336c670
Password: ********
Language Code: EN
Log Activated: ON
Allow Background Synch: OFF

Item Synchronization

Inventory Synchronization

Customer Synchronization

Order Processing
Link your Shopify Shop.

- Enter a Code for your Shopify Shop.
- Enter the URL of your Shopify Store, together with the API Key and the password. See Create API credentials.
- Select the language code.
- Activate the log.
- Select ‘Allow Background Syncs’ if you want to run the synchronization in background.

The next step is to define how you want to synchronize your data. Depending on your choices, some fields will be added or will disappear.

More information about how to synchronize your data can be found in the user guide further in this document.
Scaptify

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**Item Synchronization**

- Select how you want to sync your items
  - From Dynamics 365 Business Central to Shopify
  - From Shopify to Dynamics 365 Business Central

- Select if you automatically want to create unknown items.

- Select the Item template you want to use to create the items

- Define if you only want to create or also update items.

- Select if you want to sync images, extended texts, item attributes

- Select if and how you want to create variants and stock keeping units in Business Central.

**Inventory Synchronization**

- Define if you want to manage your inventory in Shopify based on Business Central.

- Define if you to prevent negative inventory.
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Customer Synchronization

- Select how want to import your customers from Shopify
  - Not
  - With order import
  - All customers

- Select if you automatically want to create unknown customers.

- Select a customer template based on which customers from Shopify, automatically or not, are created in Dynamics 365 Business Central.

- Define which fields in Business Central needs to be filled with which fields in Shopify.

- Select a customer on which the orders should be created if you do not want to create a customer in Business Central for each customer in Shopify.

- Define if you only want to create or also update customers.

- Define if you want to export your customers to Shopify.

Order Processing

- Define if you want to export your customers to Shopify.

The last step is to do some settings for order processing.
Enter the ‘Shipping cost Account’.

Select if you want to show your Shopify Order No. in the lines of your Sales document in Dynamics 365 Business Central

**Tax Area Source**

There are some restrictions for the Tax/VAT setup:

- The VAT/Tax setup must be the same in the Shopify shop and in Business Central.
- When you use multiple VAT/tax percentages, Business Central should be leading. If Business Central is not leading and you use Collections in Shopify to handle Taxes you should use the same naming convention in Business Central for Tax setup, furthermore, the item should already exist in Business Central. When this is not the case a new item is created based on the defined item template and uses the VAT/tax percentage defined in this template, not the one set in the Shopify Shop.

The Shopify Connector is now setup and ready to use.
3. Item Synchronization

3.1 Synchronize item to Shopify

3.1.1 Setup Items to synchronize

On the tab ‘Item Synchronization’ of the Shopify Shop Card, you can enter to sync the items (item data, item attributes, extended text, item tags...) and item images to Shopify.

- **Sync item**
  Sync your item ‘To Shopify’.

- **Can update Shopify Products**
  Define if Business Central can only create items or also update items

- **Customer Price Group**
  Determine which price should be used for an item in Shopify. The sales price of this customer price group is taken. If no group is entered, the price of the item card is used.

- **Customer Discount Group**
  Determine which discount should be used for an item in Shopify. The sales discount of this customer discount group is taken. If no group is entered, there is no discount.

- **Sync item images**
  Sync your items ‘To Shopify’

- **Sync item extended text**
  Select if you want to sync the extended text of the item.

- **Sync item attributes**
  Select if you want to sync the item attributes of the item.
• Variant  
  o UOM as variant  
    Define if you want to create variants for the unit of measure  
  o Variant option name for UOM  
    Choose the option name you want to use for the variant in Shopify.  
  o SKU Type  
    Choose how you want to define your SKU in Shopify  
      ▪ Blanc  
      ▪ Item No.  
      ▪ Variant Code  
      ▪ Item No. + Variant Code  
      ▪ Vendor Item No.  
      ▪ Barcode  
  o SKU Field Separator  
    Set a field separator if you choose the option ‘Item No. + Variant Code’ as SKU Type.

When you navigate to ‘Products’ on your Shopify Shop Card, you can add the items from Dynamics 365 Business Central you want to synchronize to Shopify.
Scaptify
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SHOPIFY PRODUCTS

Search Process Synchronization Page Actions Fewer options

Map Product Add Items Tags

SHOPIFY ADD ITEM TO SHOPIFY

GroupName

ShopCode: SCAPTAPOC

Filter: Item

No. 192

Filter totals by:

Schedule... OK Cancel
At the bottom of the screen, you can find the variants of the selected product.

**Remark:** Items are automatically created in Shopify if you add items. In 'Id' you can see the Shopify-id.

**Remark:** It is possible to add 'Item tags' to your items in Dynamics 365 Business Central. These tags are also synchronized to Shopify.
3.1.2 Setup locations

In Shopify you can define more than one location via ‘Settings’ > ‘Locations’.
These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations

Use the function ‘Get Shopify Locations’ to get the locations from Shopify.
The locations appear in Business Central. Link the Shopify location with the location in Business Central.

- Table filter: determines the location(s) for which the stock must be counted.
- Default location: determines the location to be used in the orders.

Uncheck ‘Disable’ if you want to sync the inventory for this location to Business Central.

3.1.3 Execute Item Synchronization

3.1.3.1 By batch task

In the Role center, use the search function to find the task “Sync Items to Shopify”: 
When executing this task, the configured items are synchronized to your Shopify account.

You can verify this on the admin page of your Shopify account.
3.1.3.2  By action ‘Sync’

When you navigate to ‘Products’ on your Shopify Shop Card, you can execute the function ‘Sync Products’ to synchronize the items to your Shopify Account. Only the updated products and fields are synchronized.

You can verify this on the admin page of your Shopify account.
Scaptify Connector User Guide

ATHENS Desk

**Title:** ATHENS Desk

**Description:**

```
This is a desk.
This desk is black.
```

**Attributes:**

- **Color:** Black
- **Depth:** 80 CM
- **Width:** 200 CM
- **Height:** 170 CM
- **Material Description:** Wood

**Images:**

- [Image of Athen Desk]

**Variants:**

- **Variant:** BLACK
  - **Unit of Measure:** PCS
  - **Inventory:** 5
  - **Price:** €1,000.8
  - **SKU:** 1896-S
  - **Edit**

- **Variant:** WHITE
  - **Unit of Measure:** PCS
  - **Inventory:** 10
  - **Price:** €1,000.8
  - **SKU:** 1896-S
  - **Edit**
3.1.3.3  Sync Product images

When you navigate to ‘Products’ on you Shopify Shop Card, you can execute the function ‘Sync Product Images’ to synchronize the item image to your Shopify Account.

![Sync Product Images](image)

3.2  Synchronize item from Shopify to Dynamics 365 Business Central

3.2.1  Setup Items to synchronize

On the tab ‘Item Synchronization’ of the Shopify Shop Card, you can enter to sync the items from Shopify.

- **Sync item**
  Sync your item ‘From Shopify’.
- **Auto create unknown items**
  Define if you want to automatically create unknown items.
- **Shopify can update items**
  Define if Shopify can only create items or also update items
### 3.2.1.1 Setup to sync variants

On the tab ‘Synchronization’ of the Shopify Shop Card, you can indicate if and how you want to synchronize variants and stockkeeping units from Shopify to Dynamics 365 Business Central.

<table>
<thead>
<tr>
<th>Item Synchronization</th>
</tr>
</thead>
</table>
| Sync Item                 | From Shopify  
| Auto Create Unknown Items |  
| Shopify Can Update Items  |  
| Can Update Shopify Products |  
| Item Template Code        | ITEM000001  
| Sync Item Images           | From Shopify  
| Sync Item Extended Text    |  
| Sync Item Attributes       |  
| UOM as Variant             |  
| Variant Option Name for UOM |  
| Variant Prefix             | V_  
| SKU Type                   | Item No. + Variant Code  
| SKU Field Separator        | /  

- **Variant Prefix**
  
  The variants you have defined in Shopify are created in Business Central based on an increasing number. You can choose a prefix for the variants.

- **SKU Type**
  
  Define if and how you want to create variants in Dynamics 365 Business Central.
  
  - Phon: You do not want to create variants
  
  - Item no.
3.2.2 Setup locations

In Shopify you can define more than one location via ‘Settings’ > ‘Locations’.

These locations need to be available in Microsoft Dynamics 365 Business Central.
On the Shopify Shop Card: Process > Locations

Use the function ‘Get Shopify Locations’ to get the locations from Shopify.

The locations appear in Business Central. Link the Shopify location with the location in Business Central.

- Table filter: determines the location(s) for which the stock must be counted.
- Default location: determines the location to be used in the orders.

Uncheck ‘Disable’ if you want to sync the inventory for this location to Business Central.
3.2.3 Setup to automatically create unknown items

On the tab ‘Item Synchronization’ of the Shopify Shop Card, you can indicate to automatically create unknown items from Shopify into Dynamics 365 Business Central based on an item template.

3.2.4 Execute Item Synchronization

On the Products page, you can synchronize items from Shopify to Business Central via the function ‘Sync Products’.
### 3.2.4.1 Sync product images

When you navigate to ‘Products’ on your Shopify Shop Card, you can execute the function ‘Sync Product Images’ to synchronize the items in Business Central.
4. Inventory Synchronization

The inventory of Shopify goes to Business Central. If there is a difference with the calculated inventory in Business Central, the inventory is updated in Shopify.

4.1 Setup inventory to synchronize

On the tab 'Inventory Synchronization' of the Shopify Shop Card, you can enter to sync inventory.

- Inventory Synchronization
  Define if you want to manage your inventory in Shopify based on Business Central.

- Default Inventory Policy
  Define if you want to prevent negative inventory.
    - Continue: The inventory can go negative.
    - Deny: You want to prevent negative inventory.

4.2 Setup locations

In Shopify you can define more than one location via ‘Settings’ > ‘Locations’.
These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations

Use the function ‘Get Shopify Locations’ to get the locations from Shopify.
The locations appear in Business Central. Link the Shopify location with the location in Business Central.

- Table filter: determines the location(s) for which the stock must be counted.
- Default location: determines the location to be used in the orders.

Uncheck ‘Disable’ if you want to sync the inventory for this location to Business Central.

### 4.3 Execute stock synchronization

On your Shopify Shop Card or on your Shopify Products, you can execute the function ‘Sync inventory’.

The inventory of Shopify goes to Business Central. If there is a difference with the calculated inventory in Business Central, the inventory is updated in Shopify.
You can verify this on the admin page of your Shopify account.

On het Shopify Products page in Business Central, you can find the ‘Shopify Inventory Factbox’. In this factbox you get an overview of the Shopify Stock and the last calculated inventory in Business Central. There is a record per location.
5. Customer Synchronization

5.1 Setup customers to synchronize

On the tab ‘Customer Synchronization’ of the Shopify Shop Card, you can enter to sync customers.

<table>
<thead>
<tr>
<th>Customer Synchronization</th>
<th>Can Update Shopify Customers</th>
<th>Name Source</th>
<th>Contact Source</th>
<th>County Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Import from Shopify</td>
<td>With Order Import</td>
<td>Company Name</td>
<td>First Name and Last Name</td>
<td>Code</td>
</tr>
<tr>
<td>Auto Create Unknown Customers</td>
<td>None</td>
<td>Name 2 Source</td>
<td>First Name and Last Name</td>
<td></td>
</tr>
<tr>
<td>Customer Template Code</td>
<td>CUST000001</td>
<td>Contact Source</td>
<td>First Name and Last Name</td>
<td></td>
</tr>
<tr>
<td>Default Customer</td>
<td></td>
<td>County Source</td>
<td>Code</td>
<td></td>
</tr>
<tr>
<td>Shopify Can Update Customers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Export Customer to Shopify</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Customer Import from Shopify**
  Define how you want to import the customers from Shopify in Microsoft Dynamics 365 Business Central
  - None
    Customers are not imported. You can use a default customer for your webshop orders.
  - With order import
    When an order is imported, the customer of this order is created.
  - All customers
    Select if you want to create all customers.

- **Auto create unknown customers**
  Select if you want to create customers automatically based on a customer template or if you want to do this manually.

- **Customer template code**
  Select a customer template code which is used to create customers.

- **Default customer**
  If you do not want to create customers of each webshop user, you can use a default customer for all webshop orders.

- **Shopify can update customers**
  Define if Shopify can only create customers or also update customers.
- Export customer to Shopify
  With this option, you can export all customers with a valid e-mail address from Microsoft Dynamics 365 Business Central to Shopify.
- Can update Shopify Customers
  Define if Microsoft Dynamics 365 for Business Central can only create customers or also update customers.
- Name Source
  Define how you want to sync the name of the customer
  - Company name
  - First name and last name
  - Last name and first name
  - Not
- Name 2 Source
  Define how you want to sync name 2 of the customer
  - Company name
  - First name and last name
  - Last name and first name
  - Not
- Contact Source
  Define how you want to sync the contact of the customer
  - First name and last name
  - Last name and first name
  - Not
- County Source
  Define how you want to sync the county
  - Code
  - Name

5.2 Customer template per country

It is also possible to define a customer template per country. When synchronizing your Shopify orders from Shopify to Dynamics 365 Business Central, the customer template defined for the country of your customer will be used to create the customer in Dynamics 365 Business Central.
When you navigate to 'Customer Templates' on you Shopify Shop Card, you can define a customer template for each country.
Scaptify
Scaptify Connector User Guide
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When you use multiple VAT/tax percentages, NAV should be leading. Furthermore, the item should already exist in NAV. A new item is created based on the defined item template and uses the VAT/tax percentage defined in this template, not the one set in the Shopify Shop.
When a customer has a country code for which you have not defined a template, the customer has not been created. The sell-to customer in the Shopify orders stays empty. In the Shopify customer templates, the country code was added so you can define a template for this.

Remark: If you have not defined a country-specific customer template, but a general customer template in the Shopify Shop setup, the general template will be used to create the customer in Dynamics 365 Business Central.

5.3  Synchronize customers

5.3.1  Manually sync customers

There are two ways to go to the customer sync.

- Via ‘Customers’
- Via the Shopify Shop Card

5.3.2 Verify customer creation

Verify that the new customer is created in Dynamics 365 Business Central. Go to ‘Customers’ and verify the customer is added to the list and a customer number is linked.
5.4 Manually create customers

When the customer is not automatically created for one reason or another, it can be created manually.

In the Shopify Order, you can select a customer template code and create the customer via the function ‘Create new customer’ or you can select an existing customer.
In the Shopify Shop Customer List, you can select open the Shopify customer card and select an existing customer.
6. Order Processing

6.1 Setup Order Processing

On the tab ‘Order Processing’ of the Shopify Shop Card, you can define some setup for order processing.

Order Processing

- **Shipping Cost Account**
  Define the g/l account that should be used for shipping costs.

- **Shopify Order No. on Doc. Line**
  Check this option if you want to show the Shopify order number on the sales lines.

- **Tax area source**
  Define your tax area source and the sequence that needs to be followed.
6.2 Execute Order Synchronization

6.2.1 By batch task

When an order is placed in Shopify, you can synchronize this to Dynamics 365 Business Central by executing the task “Sync Orders from Shopify”.

You can find this task by using the search function from the Role Center:
When executing this task, the Shopify Orders are imported in Dynamics 365 Business Central.

6.2.2 By action ‘Sync orders from Shopify’

When you navigate to the Shopify Orders via your Shopify Shop, you can execute the function ‘Sync Orders From Shopify’ to synchronize the orders from your Shopify Account.
6.2.3 By job queue

You can also schedule a job that runs for example every few minutes.

You can find the job queue entries by using the search function from the Role Center:

Define the recurrence of the job queue and start the job queue ‘Sync Orders from Shopify’.
6.3 View Shopify Orders

You can find the Shopify Orders using the search function from the Role Center:

6.3.1 All Shopify Orders

This are all the open orders of all Shopify Shop Accounts
6.3.2 Shopify Orders of a specific shop

Navigate to the Shopify Shop to get an overview of all the Shopify Orders for this Shop.

6.4 Process Shopify Orders

Navigate to the Shopify Orders.
Edit the Shopify order.

On the Shopify Order Card you can find all the information about the Shopify Order, for example the shipping costs, fulfillments,…

If the customer is not found automatically, you can select the correct customer, or create a new customer directly from the Shopify Order.
When the customer is selected, you can process the Shopify Order to a Sales Order.

6.4.1 By action ‘Create Sales Document’

You can process the Shopify order to a sales order by using the action “Create Sales Document”.
A sales order is now created, and can be handled by using the standard Dynamics 365 Business Central functionalities.

Shipment costs are added to the sales order.
If you checked the field ‘Shopify order no. on doc. Line’, the Shopify order number is visible in the sales lines.
6.4.2 By job queue

You can also schedule a job to process the Shopify orders that runs for example every few minutes.

You can find the job queue entries by using the search function from the Role Center:
Define the recurrence of the job queue ‘Process Shopify Orders’ and start the job queue.

**Report · 70007605 · Shopify Create Sales Orders**

**Recurrence**

- Recurring Job: Off
- Run on Mondays: On
- Run on Tuesdays: On
- Run on Wednesdays: Off
- Run on Thursdays: Off
- Run on Fridays: Off

- Run on Saturdays: Off
- Run on Sundays: Off

**Status**: On Hold

**Description**: Shopify Create Sales Orders

**Earliest Start Date/Time**: 

**No. of Minutes between ...**: 0

**Inactivity Timeout Period**: 0
6.5 Synchronize Shipments to Shopify

When a sales order that is created from a Shopify Order, is shipped, you can synchronize the shipments to Shopify.

The customer will automatically receive a shipment notice email. When a Shipping Agent and a Tracking Code is specified on the shipment, the tracking information will be included in the email.

Scapta

Your order is on the way

Your order is on the way. Track your shipment to see the delivery status.

View your order

or Visit our store

Items in this shipment

AMSTERDAM Lamp × 1
BLUE / PCS

If you have any questions, reply to this email or contact us at Scabo365@scapta.com
6.5.1 By batch task

You can synchronize the shipment by executing the task “Synchronize Shipments To Shopify”.

This task can be found by using the search function on the Role Center.

![Dynamics 365 Business Central screen with search bar and task selection](image)

6.5.2 By job queue

You can also schedule a job to synchronize shipments to Shopify orders that runs for example every few minutes.

You can find the job queue entries by using the search function from the Role Center:
Define the recurrence of the job queue ‘Sync Shipments to Shopify’ and start the job queue.
6.6 Synchronize orders from Shopify

Synchronize the orders from Shopify again to update the fulfillment status in Dynamics 365 Business Central.

Enter your Shopify Shop

Open the Shopify Orders of the Shopify Shop
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Scaptify

Shopify Shop Card | Work Date: 8-4-2019

SCAPTAPOC

New | Synchronization | Actions | Navigate | Fewer options

Locations | Products | Orders | Customer Templates

Shopify Orders | Work Date: 8-4-2019

<table>
<thead>
<tr>
<th>Shop Code</th>
<th>Shopify Order No.</th>
<th>Class</th>
<th>Set To Customer No.</th>
<th>Set To Customer Name</th>
<th>Created At</th>
<th>Curr.</th>
<th>Financial Status</th>
<th>Fulfillment Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCAPTAPOC</td>
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7. Reset sync

On the Shopify Shop card, there are functions available to reset the sync. This function ensures that when the sync is executed, all data is synced and not just the changes that have happened compared to the previous sync.

This function only applies to syncs from Shopify to Business Central.
8. Troubleshooting

When a synchronization task from / to Shopify fails, you can activate logging on the tab ‘General’ in the Shopify Shop Card:

After you start the synchronization task again, you can check the Scaptify Log Entries for any errors / information:
Make sure to disable the logging when not needed, or to delete the entries periodically.