



## 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/>.

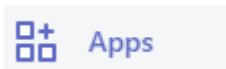
More information about how to create and personalize your Shopify store can be found at <https://help.shopify.com/>.

#### 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.

Unsaved Changes Cancel Save

< Private apps

## Create private app

### Description

These details can help you keep track of your private apps.

Private app name

Contact email

This email address will be used to notify you of any issues regarding your app.

### Admin API

These permissions determine what data your private app can access. It is recommended that you enable only what is necessary for your app to work.

[Learn more about API authentication.](#)

Your API credentials will be generated when you Save.

Store content like articles, blogs, comments, pages, and redirects read_content, write_content	Read access ▾
Customer details and customer groups read_customers, write_customers	Read access ▾
Orders, transactions and fulfillments read_orders, write_orders	Read and write ▾
Products, variants and collections read_products, write_products	Read and write ▾

[▼ Review disabled Admin API permissions](#)

### Storefront API

Private apps can use the [Storefront API](#) to develop customized customer-facing shopping experiences on web, mobile, and in-game.

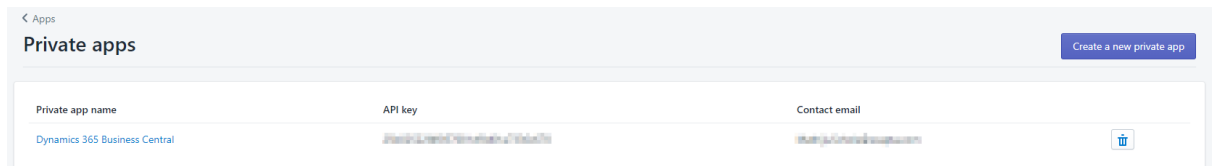
[Learn more about custom storefronts.](#)

☐ Allow this app to access your storefront data using the Storefront API

Cancel Save



- 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.



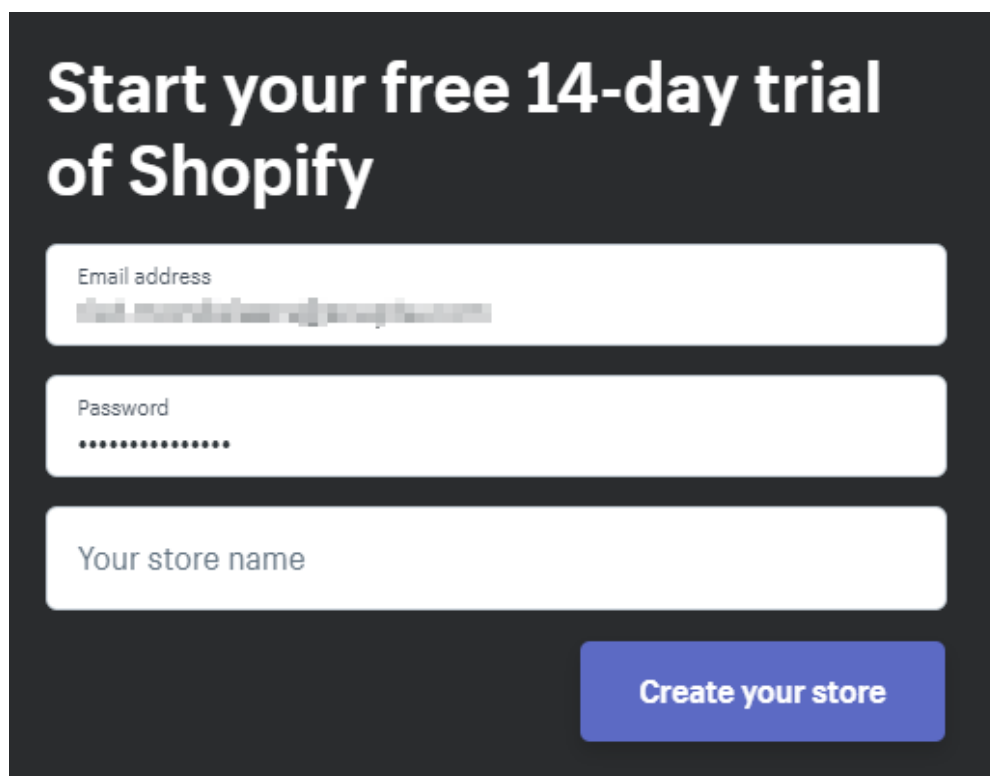
Private app name	API key	Contact email
Dynamics 365 Business Central	[Redacted]	[Redacted]

## 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>.

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



**Start your free 14-day trial of Shopify**

Email address  
[Redacted]

Password  
[Redacted]

Your store name  
[Redacted]

**Create your store**



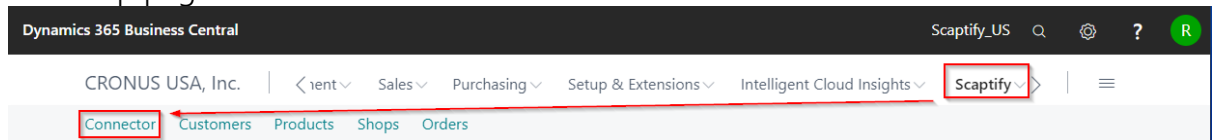
Remark: 'Your store name' is the name of the Shopify store you created.

## 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.

Back

Next

Finish

- Click Next on the welcome page.
- Complete your company information and click next.





SCAPTIFY REGISTRATION

IF YOU HAVE A LICENCE KEY

License Key ..... {00000000-0000-0000-0000-000000000000}

PLEASE COMPLETE THE PAGE BELOW TO REGISTER THE SCAPTIFY CONNECTOR.

Name ..... My Company

Address ..... Kempische Steenweg 293 bus 38

Address 2 .....

Post Code ..... 3500

City ..... Hasselt

County .....

Country/Region Code ..... BE

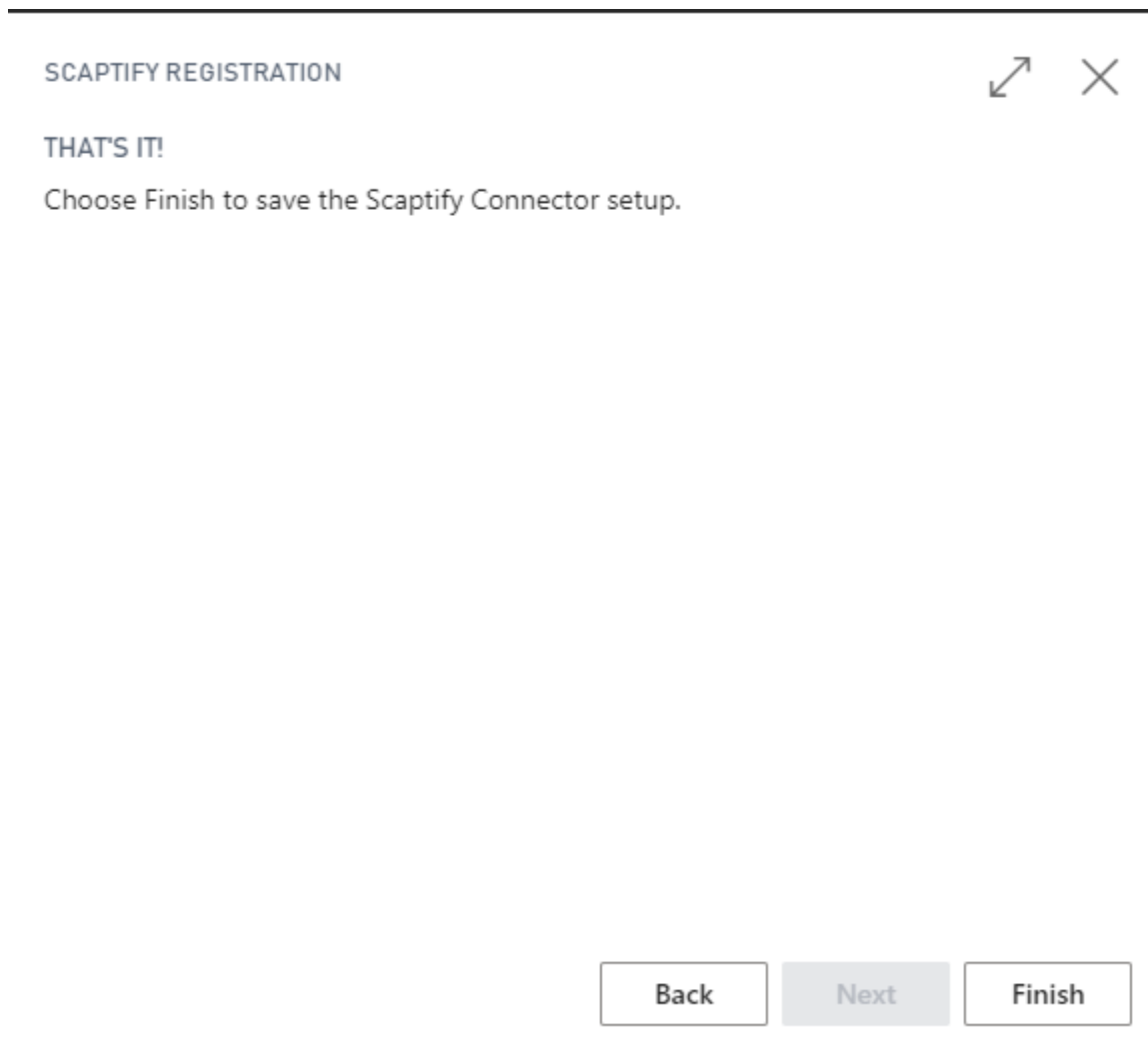
VAT Registration No. ....

Back

Next

Finish

- When you finish the wizard, the license key will be created.



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



←

# Register

Shops

More options

Connector Info

License Key

{52a4c3a6-73ad-42b7-90d8-a5...

Version

15.6.0.0

Partner

Partner Name

...

Restrictions

Shopify License Restrictions

	Name ↑	Periode	Value
→	Orders	Month	30
	Webshops		1

### 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

Register

Shops

More options



### Connector Info

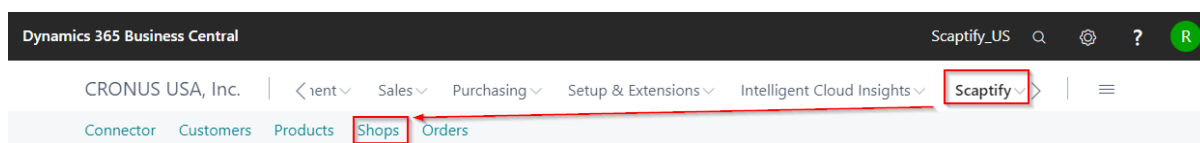
License Key ..... {52a4c3a6-73ad-42b7-90d8-a5...

Version ..... 15.6.0.0

Partner >

Restrictions >

- Or follow the path 'Scaptify > Shops'



SHOPIFY SHOP CARD



✓ SAVED



## SCAPTAPOC

New

Synchronization

Actions

Navigate

Fewer options

### General

Code ..... SCAPTAPOC

Language Code ..... ENU

Shopify URL ..... https://scaptapoc.myshopify.com/

Log Activated ..... ☒

API Key ..... 25b02522f4f057681cf8d01e7336c670

Allow Background Syncs ..... ☐

Password ..... .....

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.



### Item Synchronization

Sync Item .....	<input type="text" value="From Shopify"/>	Sync Item Attributes ...	<input checked="" type="checkbox"/>
Auto Create Unknow...	<input checked="" type="checkbox"/>	UOM as Variant .....	<input checked="" type="checkbox"/>
Shopify Can Update I...	<input checked="" type="checkbox"/>	Variant Option Name...	<input type="text" value="Unit of Measure"/>
Can Update Shopify ...	<input type="checkbox"/>	Variant Prefix .....	<input type="text" value="V_"/>
Item Template Code ...	<input type="text" value="ITEM000001"/>	SKU Type .....	<input type="text" value="Item No. + Variant Code"/>
Sync Item Images .....	<input type="text" value="From Shopify"/>	SKU Field Separator ...	<input type="text" value="/"/>
Sync Item Extended T...	<input checked="" type="checkbox"/>		

- 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

Inventory Tracket .....	<input type="checkbox"/>	Default Inventory Policy .....	<input type="text" value="Continue"/>
-------------------------	--------------------------	--------------------------------	---------------------------------------

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



### Customer Synchronization

Customer Import from Shopify ...	<input type="text" value="With Order Import"/>	Can Update Shopify Customers ...	<input checked="" type="checkbox"/>
Auto Create Unknown Customers ...	<input checked="" type="checkbox"/>	Name Source .....	<input type="text" value="Company Name"/>
Customer Template Code .....	<input type="text"/>	Name 2 Source .....	<input type="text" value="First Name and Last Name"/>
Default Customer .....	<input type="text"/>	Contact Source .....	<input type="text" value="First Name and Last Name"/>
Shopify Can Update Customers ...	<input checked="" type="checkbox"/>	County Source .....	<input type="text" value="Code"/>
Export Customer to Shopify .....	<input checked="" type="checkbox"/>		

- 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

Shipping Cost Account .....	<input type="text"/>	Tax Area Source .....	<input type="text" value="No Taxes"/>
Shopify Order No. on Doc. Line ...	<input checked="" type="checkbox"/>		

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.

**Item Synchronization**

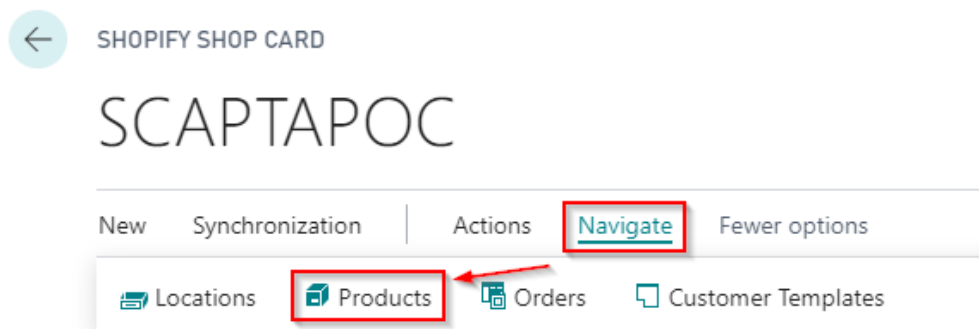
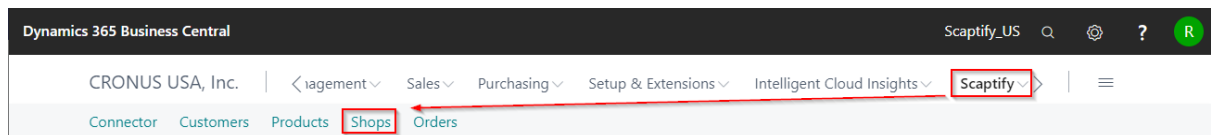
Sync Item ..... To Shopify ▼ Auto Create Unknown Items ..... <input type="checkbox"/> Shopify Can Update Items ..... <input type="checkbox"/> Can Update Shopify Products ..... <input checked="" type="checkbox"/> Item Template Code ..... ▼ Customer Price Group ..... WEBSHOP ▼ Customer Discount Group ..... WEBSHOP ▼ Sync Item Images ..... To Shopify ▼	Sync Item Extended Text ..... <input checked="" type="checkbox"/> Sync Item Attributes ..... <input checked="" type="checkbox"/> UOM as Variant ..... <input checked="" type="checkbox"/> Variant Option Name for UOM ... Unit of Measure Variant Prefix ..... SKU Type ..... Item No. + Variant Code ▼ SKU Field Separator ..... /
--	---

- 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
  - UOM as variant  
Define if you want to create variants for the unit of measure
  - Variant option name for UOM  
Choose the option name you want to use for the variant in Shopify.
  - 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
  - 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 you Shopify Shop Card, you can add the items from Dynamics 365 Business Central you want to synchronize to Shopify.





SHOPIFY PRODUCTS



Search

Process

Synchronization

Page

Actions

Fewer options



Map Product



Add Items



Tags

SHOPIFY ADD ITEM TO SHOPIFY

GroupName

ShopCode ..... SCAPTAPOC

Filter: Item

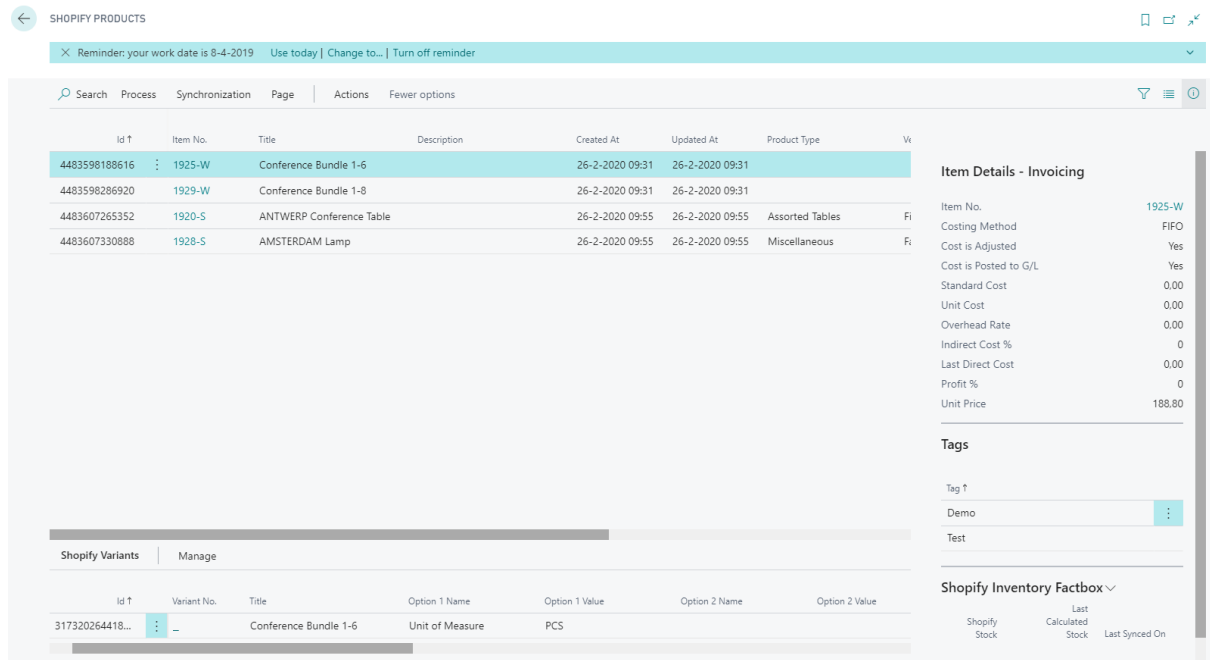
× No. .... 192\*

+ Filter...

Filter totals by:

+ Filter...

Schedule... OK Cancel



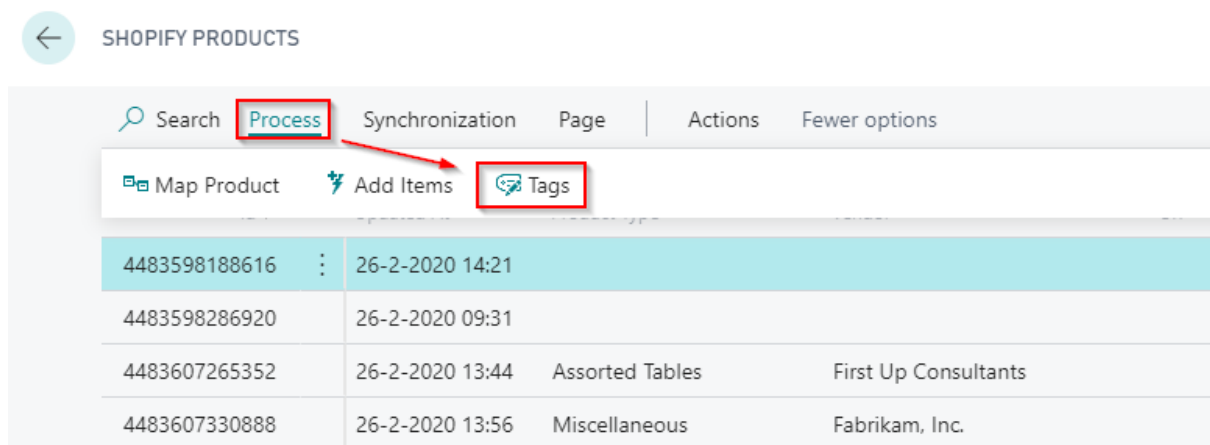
The screenshot shows the 'SHOPIFY PRODUCTS' interface. At the top, there's a reminder: 'Reminder: your work date is 9-4-2019'. Below this is a navigation bar with 'Search', 'Process', 'Synchronization', 'Page', 'Actions', and 'Fewer options'. The main table lists products with columns: Id ↑, Item No., Title, Description, Created At, Updated At, Product Type, and W. The first three rows are highlighted in blue. To the right of the table, there's a sidebar with 'Item Details - Invoicing' and 'Tags' sections. The 'Item Details' section shows various cost and pricing information for item 1925-W. The 'Tags' section shows a list of tags: Demo and Test. At the bottom, there's a 'Shopify Inventory Factbox' section showing stock levels.

Id ↑	Item No.	Title	Description	Created At	Updated At	Product Type	W
4483598188616	1925-W	Conference Bundle 1-6		26-2-2020 09:31	26-2-2020 09:31		
4483598286920	1929-W	Conference Bundle 1-8		26-2-2020 09:31	26-2-2020 09:31		
4483607265352	1920-S	ANTWERP Conference Table		26-2-2020 09:55	26-2-2020 09:55	Assorted Tables	Fi
4483607330888	1928-S	AMSTERDAM Lamp		26-2-2020 09:55	26-2-2020 09:55	Miscellaneous	Fi

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.



The screenshot shows the 'SHOPIFY PRODUCTS' interface. The 'Process' menu is highlighted with a red box, and a red arrow points to the 'Tags' option, which is also highlighted with a red box. Below the menu, there's a table with columns: Id ↑, Variant No., Title, Option 1 Name, Option 1 Value, Option 2 Name, and Option 2 Value. The first three rows are highlighted in blue.

Id ↑	Variant No.	Title	Option 1 Name	Option 1 Value	Option 2 Name	Option 2 Value
317320264418...	-	Conference Bundle 1-6	Unit of Measure	PCS		
4483598188616						
4483598286920						



Search + New Edit List Delete Page

EDIT - SHOPIFY TAGS

Entry No. ↑

→	Demo	⋮
	Test	

Close

← SHOPIFY PRODUCTS

Search Process Synchronization Page Actions Fewer options

Id ↑	Updated At	Product Type	Vendor	Url	Preview Url
4483598189616	26-2-2020 14:21				https://scaptapoc.myshopify.co...
4483598266920	26-2-2020 09:31				https://scaptapoc.myshopify.co...
4483607265352	26-2-2020 13:44	Assorted Tables	First Up Consultants		https://scaptapoc.myshopify.co...
4483607330888	26-2-2020 13:56	Miscellaneous	Fabrikam, Inc.		https://scaptapoc.myshopify.co...
4483624534088		Office Chair	First Up Consultants		

Item Details - Invoicing

Item No. 1925-W  
Costing Method FIFO  
Cost is Adjusted Yes  
Cost is Posted to G/L Yes  
Standard Cost 0.00  
Unit Cost 0.00  
Overhead Rate 0.00  
Indirect Cost % 0  
Last Direct Cost 0.00  
Profit % 0  
Unit Price 188.80

Tags

Tag ↑  
Demo ⋮  
Test

Shopify Variants Manage

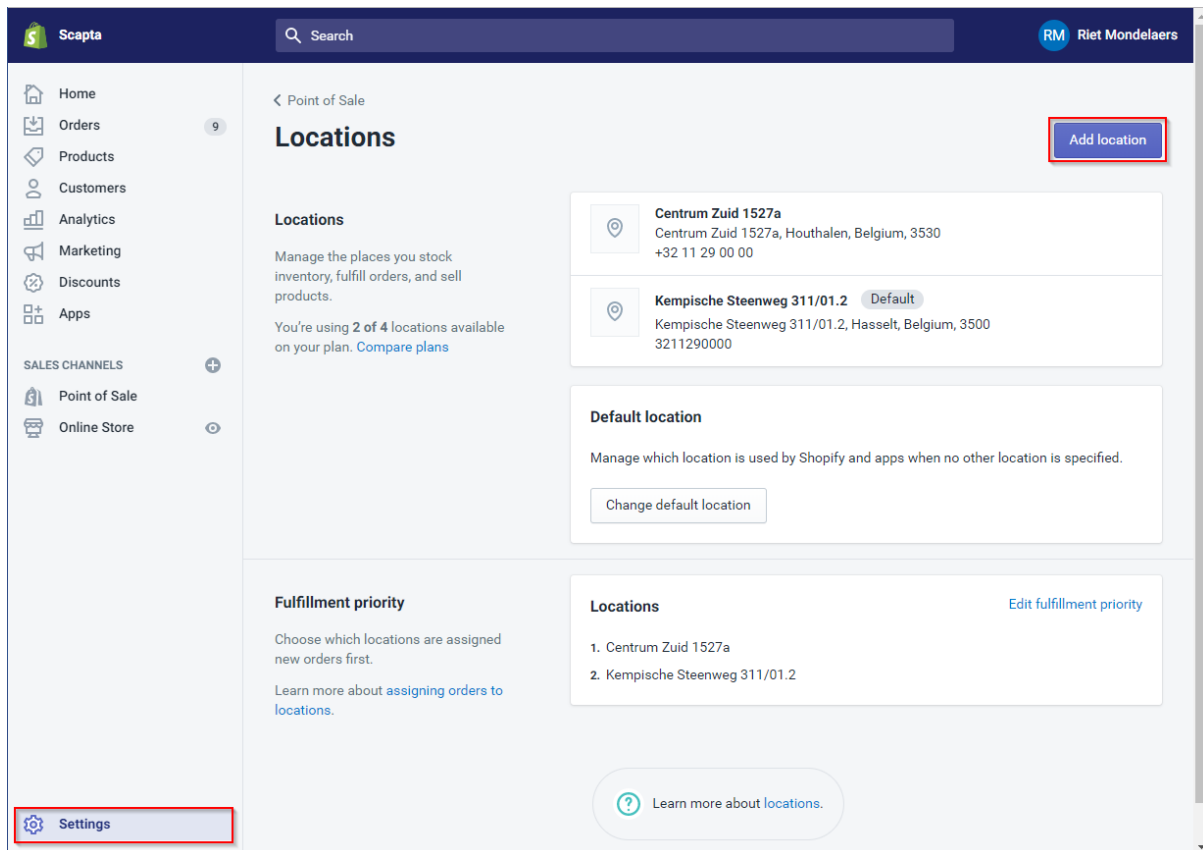
Id ↑	Item No.	Variant No.	Title	Option 1 Name	Option 1 Value	Option 2 Name	Opt
317320264418...	1925-W	-	Conference Bundle 1-6	Unit of Measure	PCS		

Shopify Inventory Factbox

Shopify Stock	Last Calculated Stock	Last Synced On
0	0	26-2-2020 10:41
0	0	26-2-2020 10:41

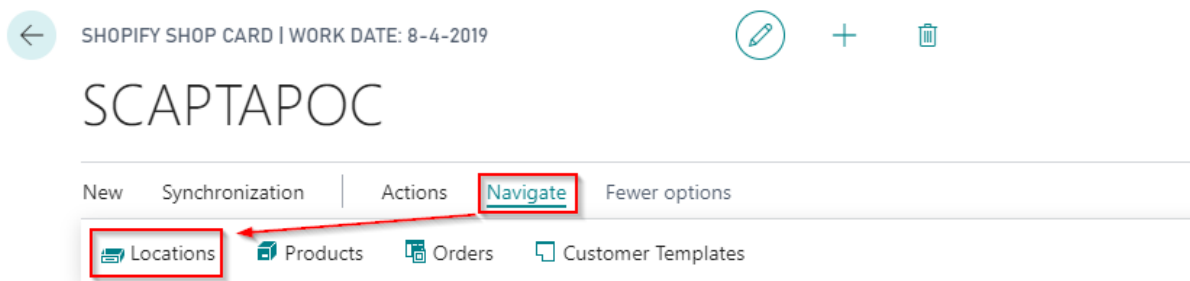
### 3.1.2 Setup locations

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

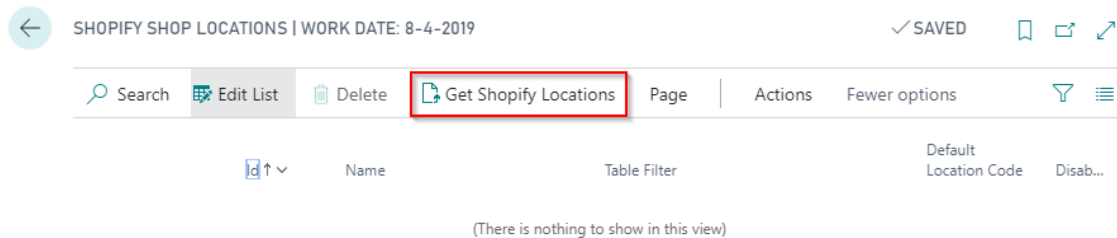


These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations

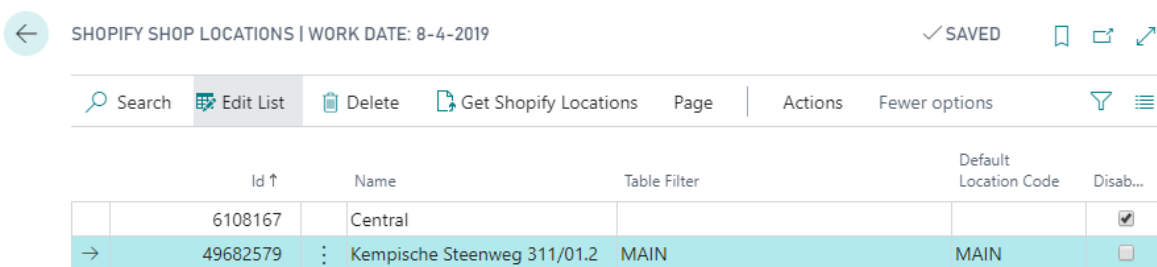


Use the function 'Get Shopify Locations' to get the locations from Shopify.



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.

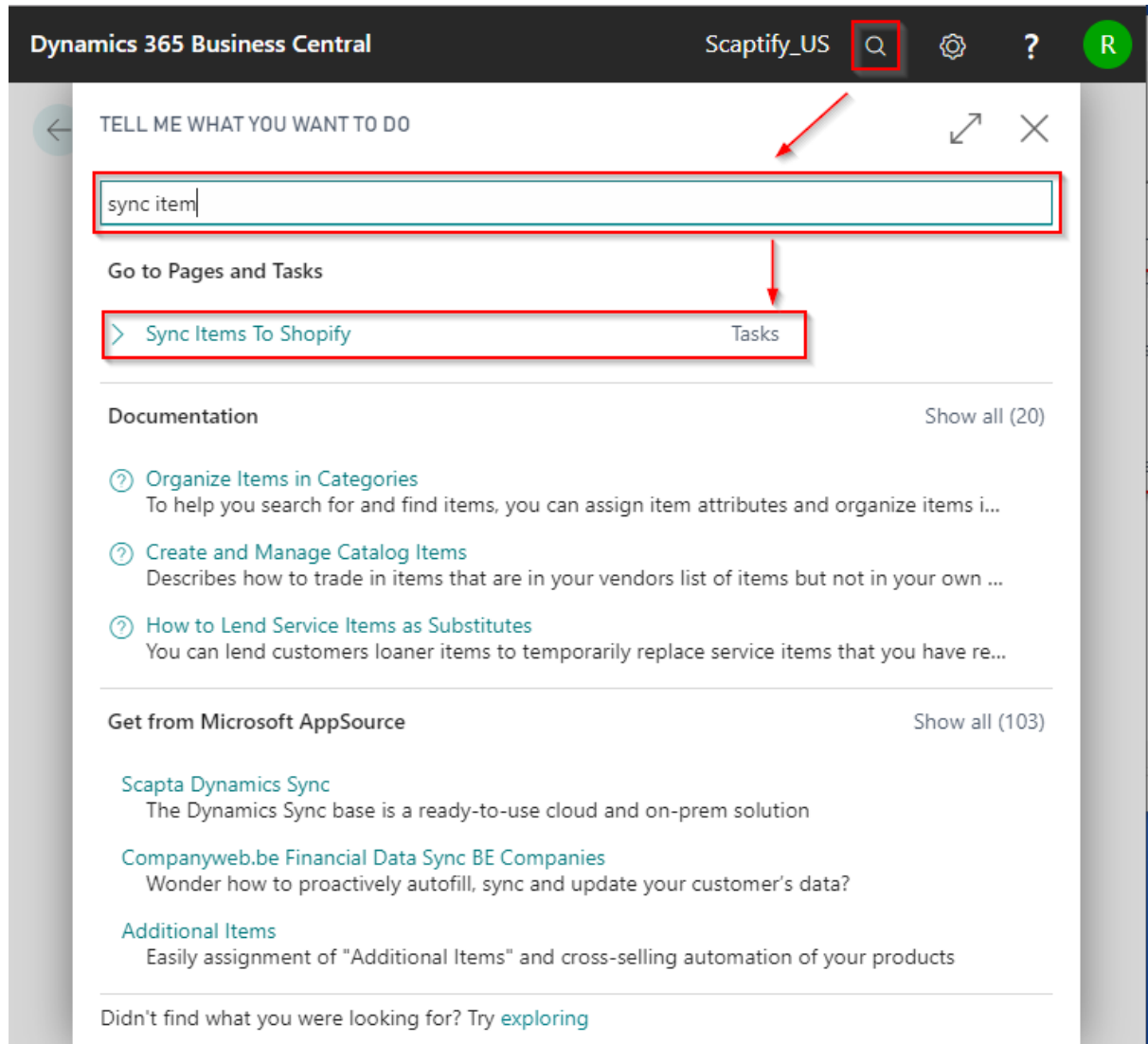


Uncheck 'Disable' if you want to sync the inventory for this location to Business Central.

### 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 you 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.

← SHOPIFY PRODUCTS

Search Process **Synchronization** Page Actions Fewer options

**Sync Products** Sync Product Images Sync Inventory

4483598188616	1925-W	Conference Bundle 1-6
4483598286920	1929-W	Conference Bundle 1-8
4483607265352	1920-S	ANTWERP Conference Table
4483607330888	1928-S	AMSTERDAM Lamp

You can verify this on the admin page of your Shopify account.

shopify

Search





Riet Mondelaers Scapta

Home Orders **Products** All products Transfers Inventory Collections Gift cards Customers Analytics Marketing Discounts Apps SALES CHANNELS Point of Sale Online Store

**Products** Export Import Add product

All

Filter Search products

Product	Inventory	Type	Vendor
 <b>AMSTERDAM Lamp</b> Unavailable on 2 channels and apps	22 in stock for 4 variants	Miscellaneous	Fabrikam, Inc.
 <b>ANTWERP Conference Table</b> Unavailable on 2 channels and apps	2 in stock for 1 variant	Assorted Tables	First Up Consultants
 <b>ATHENS Desk</b> Unavailable on 2 channels and apps	15 in stock for 2 variants	Assorted Tables	Graphic Design Institute
 <b>ATHENS Mobile Pedestal</b> Unavailable on 2 channels and apps	25 in stock for 1 variant	Assorted Tables	Graphic Design Institute



Products

### ATHENS Desk

Duplicate
View
Promote

Title


ATHENS Desk

Description

This is a desk.  
This desk is black.

Item Attributes	
Color	Black
Depth	60 CM
Width	200 CM
Height	170 CM
Material Description	Wood

Images



Product availability
Manage

Available on 1 of 1 channels and apps

Online Store

Organization

Product type

Assorted Tables

Vendor

Graphic Design Institute

Collections

Search for collections

FURNITURE

Tags



View all tags

Vintage, cotton, summer

Desk
Athens

Variants
Reorder variants
Edit options
Add variant

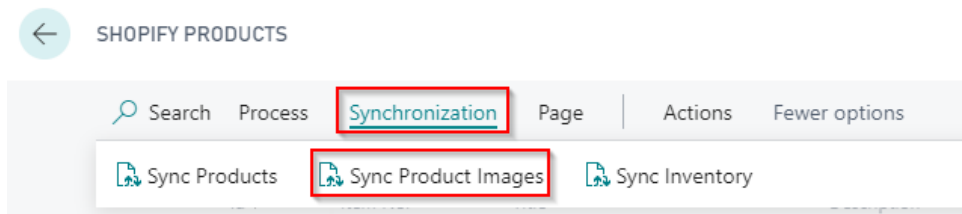
Select: All None BLACK WHITE PCS

	Item Variant	Item Unit of Measure	Inventory	Price	SKU	
<input type="checkbox"/>	 BLACK	PCS	5	€1.000,8	1896-S	Edit
<input type="checkbox"/>	 WHITE	PCS	10	€1.000,8	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.



## 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.

#### Item Synchronization

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

/

- 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

- Sync item images  
Sync your items 'From Shopify'

## 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.

**Item Synchronization**

Sync Item ..... <input type="text" value="From Shopify"/>	Sync Item Attributes ..... <input type="checkbox"/>
Auto Create Unknown Items ... <input checked="" type="checkbox"/>	UOM as Variant ..... <input type="checkbox"/>
Shopify Can Update Items ..... <input checked="" type="checkbox"/>	Variant Option Name for UOM . <input type="text"/>
Can Update Shopify Products ... <input type="checkbox"/>	Variant Prefix ..... <input type="text" value="V_"/>
Item Template Code ..... <input type="text" value="ITEM000001"/>	SKU Type ..... <input type="text" value="Item No. + Variant Code"/>
Sync Item Images ..... <input type="text" value="From Shopify"/>	SKU Field Separator ..... <input type="text" value="/"/>
Sync Item Extended Text ..... <input type="checkbox"/>	

- 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.

← 1000 · SCAPTA CHAIR | WORK DATE: 8-4-2019

### Item Variants

Code ↑		Description
	V_001	Blue / Big
→	V_002	Red / Big

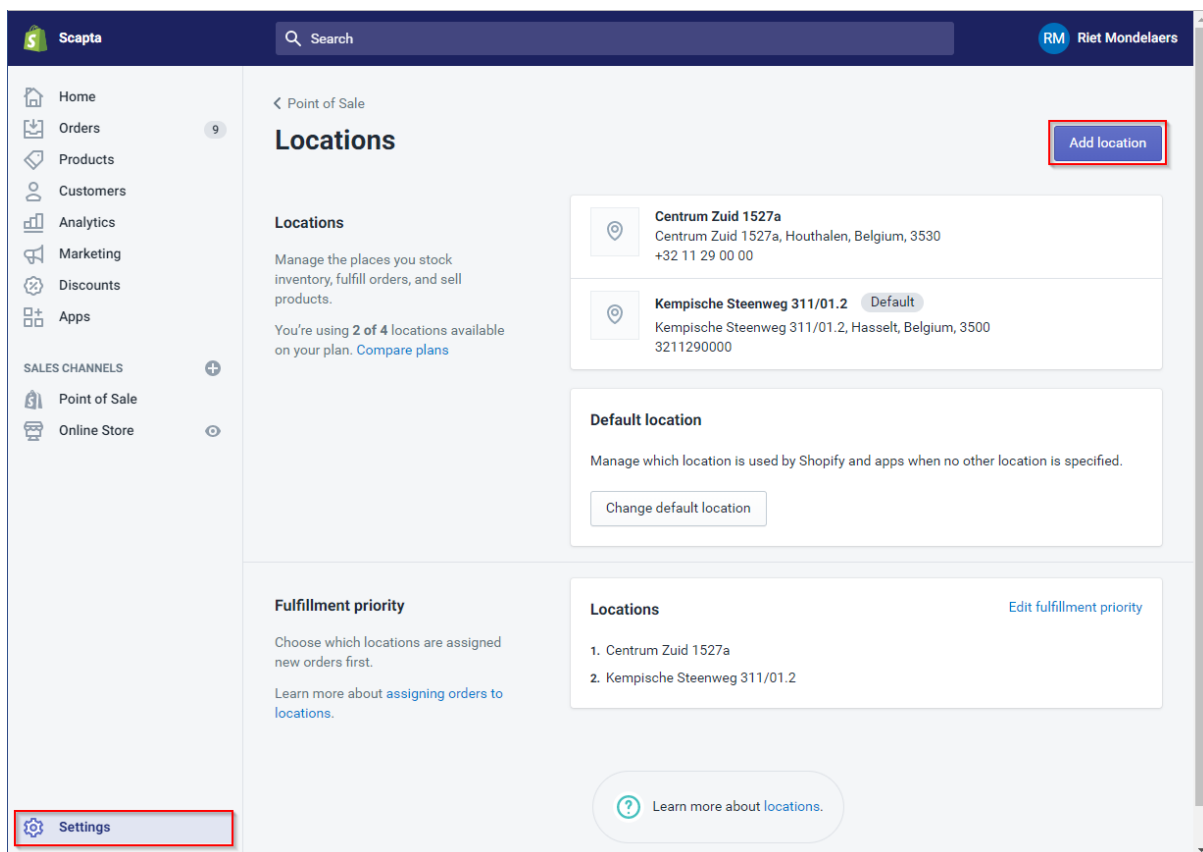
- SKU Type  
Define if and how you want to create variants in Dynamics 365 Business Central.
  - Blanc: You do not want to create variants
  - Item no.



- Variant code
  - Item No. + Variant Code
  - Vendor Item No.
  - Barcode
- SKU Field Separator  
Define a field separator for the SKU.

### 3.2.2 Setup locations

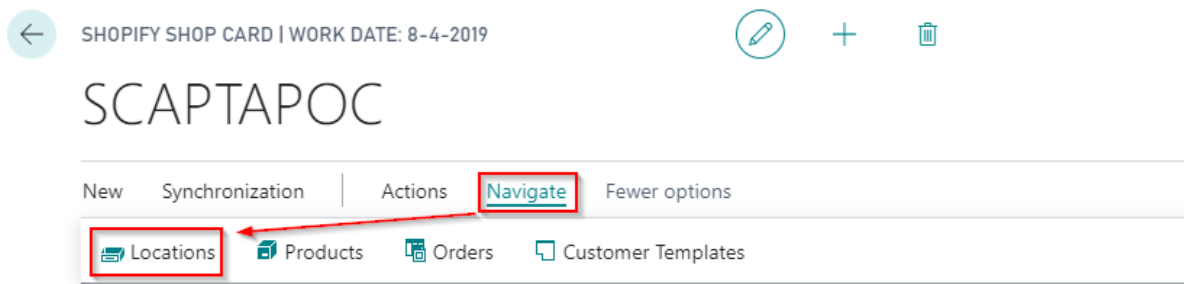
In Shopify you can define more than one location via 'Settings' > 'Locations'.



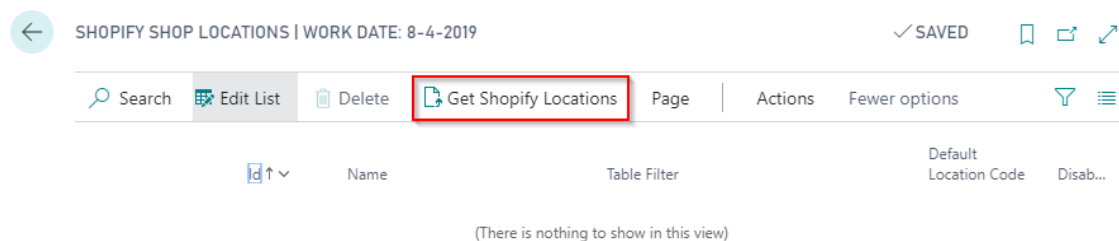
These locations need to be available in Microsoft Dynamics 365 Business Central.



On the Shopify Shop Card: Process > Locations

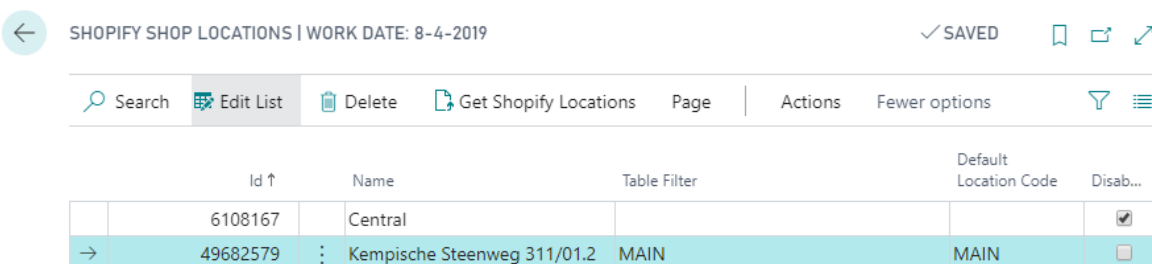


Use the function 'Get Shopify Locations' to get the locations from Shopify.



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.

**Item Synchronization**

Sync Item ..... <input type="text" value="From Shopify"/>	Sync Item Attributes ..... <input type="checkbox"/>
<b>Auto Create Unknown Items</b> ..... <input checked="" type="checkbox"/>	UOM as Variant ..... <input type="checkbox"/>
Shopify Can Update Items ..... <input checked="" type="checkbox"/>	Variant Option Name for UOM ..... <input type="text"/>
Can Update Shopify Products ..... <input type="checkbox"/>	Variant Prefix ..... <input type="text" value="V_"/>
<b>Item Template Code</b> ..... <input type="text" value="ITEM000001"/>	SKU Type ..... <input type="text" value="Item No. + Variant Code"/>
Sync Item Images ..... <input type="text" value="From Shopify"/>	SKU Field Separator ..... <input type="text" value="/"/>
Sync Item Extended Text ..... <input type="checkbox"/>	

## 3.2.4 Execute Item Synchronization

On the Products page, you can synchronize items from Shopify to Business Central via the function 'Sync Products'.

← SHOPIFY PRODUCTS | WORK DATE: 8-4-2019

Search Process **Synchronization** Page Actions Fewer options

**Sync Products** Sync Product Images Sync Inventory

← SHOPIFY PRODUCTS | WORK DATE: 8-4-2019 ✓ SAVED

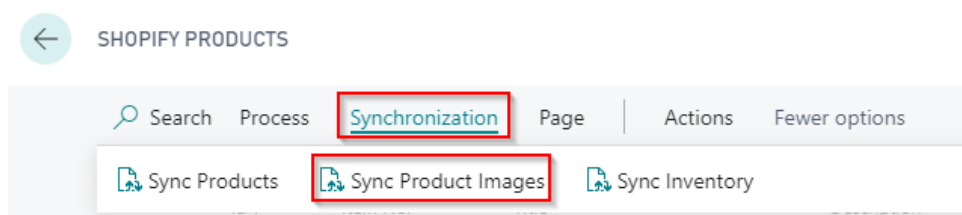
Search + New Edit List Delete Page

Id ↑	Item No.	Title	Description	Created At
→ 4377929154632	1900-S	PARIS Guest Chair, black	Item Attributes Color Black De...	25-11-2019 08:17
4377929285704	1906-S	ATHENS Mobile Pedestal	Item Attributes Color Black De...	25-11-2019 08:17
4377929416776	1908-S	LONDON Swivel Chair, blue	Item Attributes Color Blue Dept...	25-11-2019 08:17



### 3.2.4.1 Sync product images

When you navigate to 'Products' on you 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

Inventory Tracked ☒

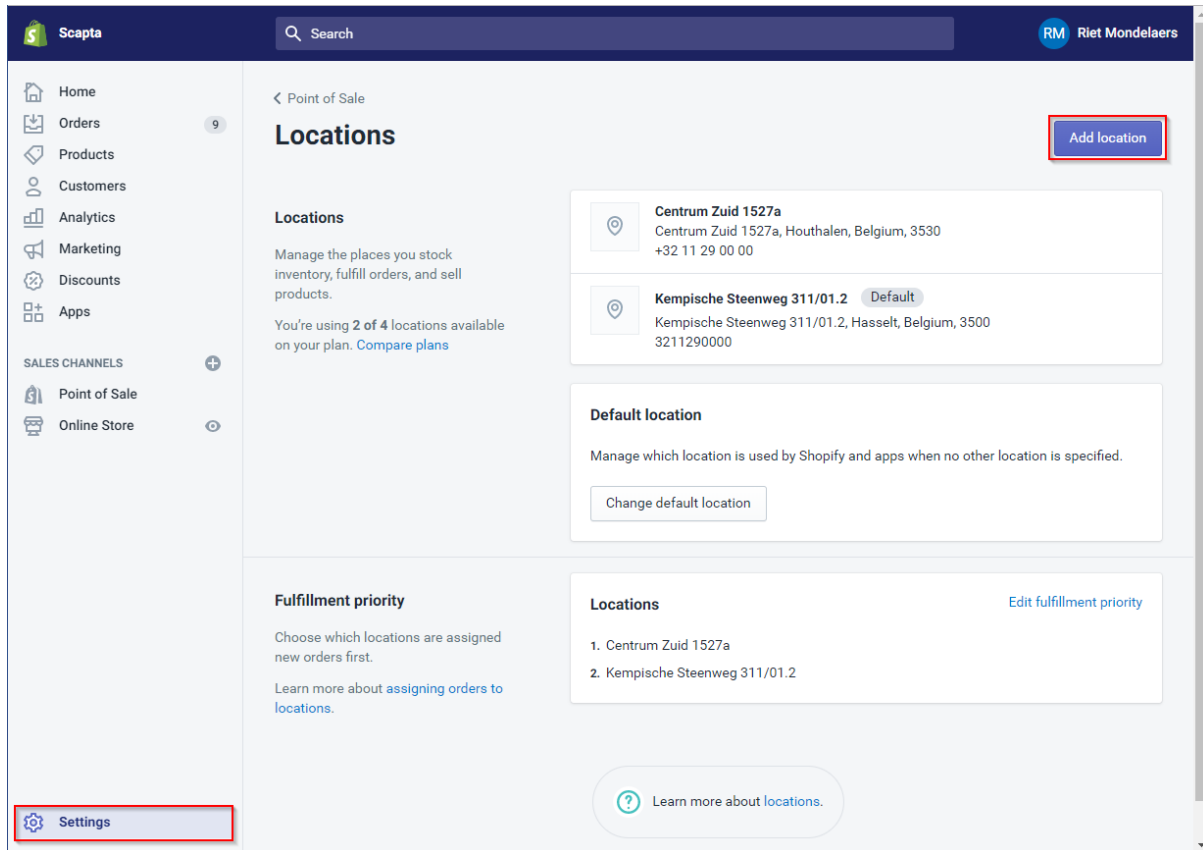
Default Inventory Policy

Continue

- Inventory Synchronization  
Define if you want to manage your inventory in Shopify based on Business Central.
- Default Inventory Policy  
Define if you to prevent negative inventory.
  - Continue: The inventory can go negative.
  - Deny: You want to prevent negative inventory.

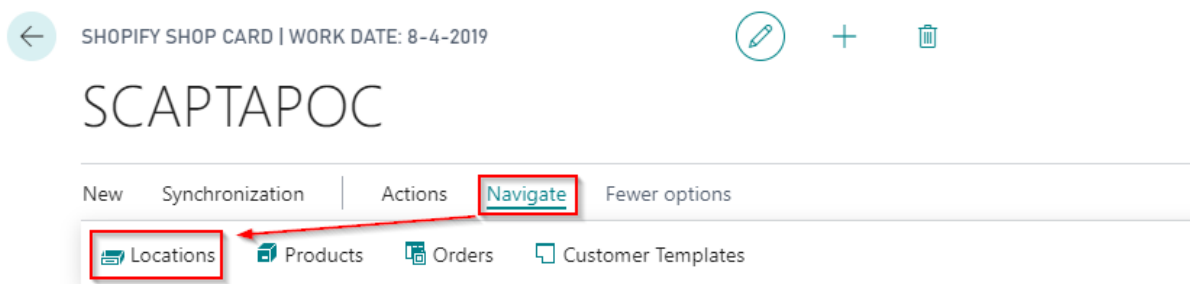
### 4.2 Setup locations

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

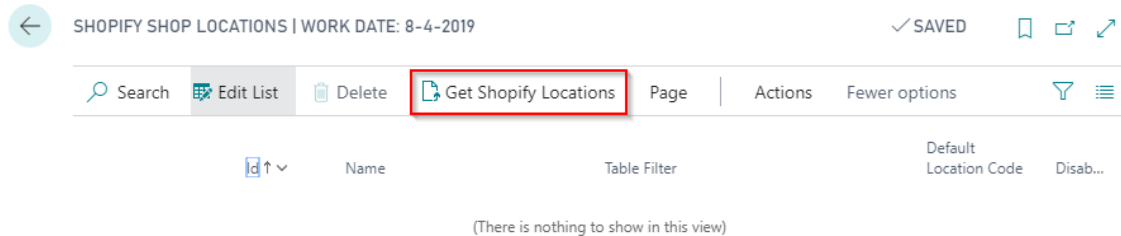


These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations

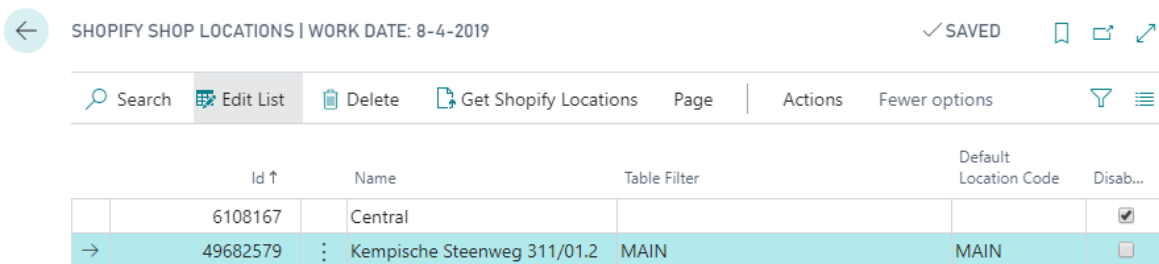


Use the function 'Get Shopify Locations' to get the locations from Shopify.



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.



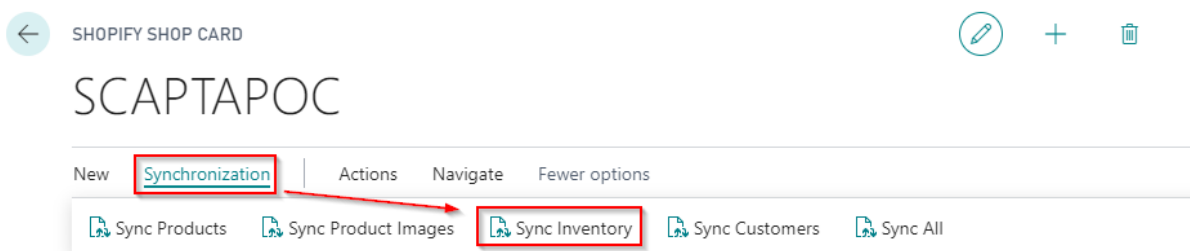
Id ↑	Name	Table Filter	Default Location Code	Disab...
6108167	Central			<input checked="" type="checkbox"/>
→ 49682579	Kempische Steenweg 311/01.2	MAIN	MAIN	<input type="checkbox"/>

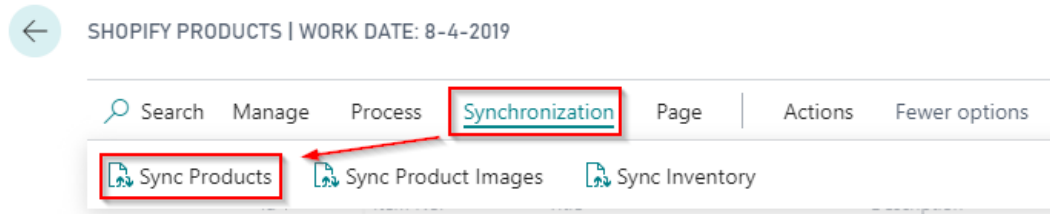
Uncheck 'Disable' if you want to sync the inventory for this location to Business Central.

### 4.3 Execute stock synchronization

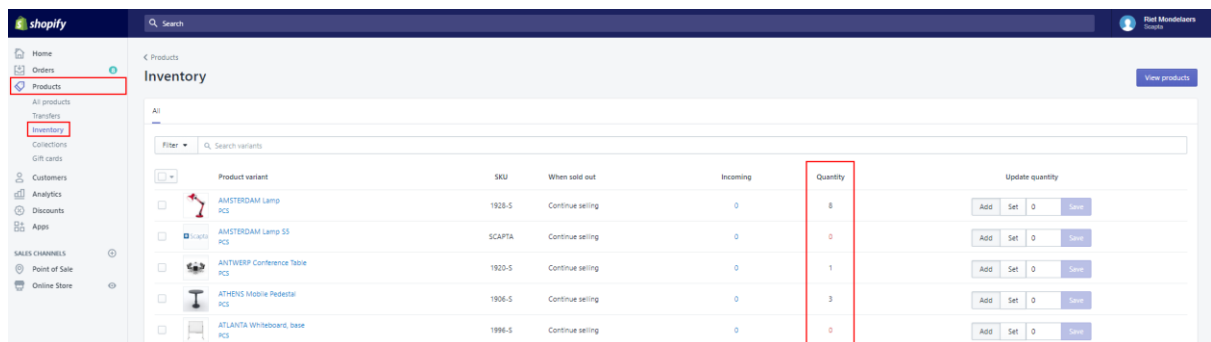
On your Shopify Shop Card or on your Shopify Products, you can execute the function 'Sync inventory'.

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.

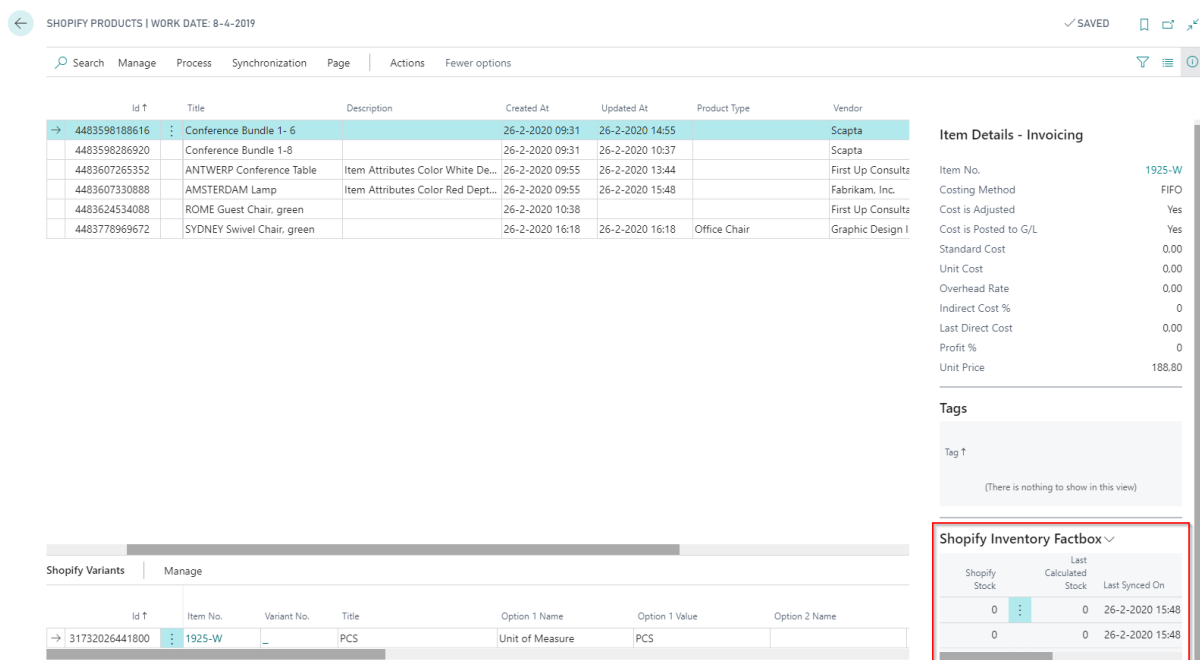




You can verify this on the admin page of your Shopify account.



On the 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.

#### Customer Synchronization

Customer Import from Shopify	With Order Import	Can Update Shopify Customers	<input type="checkbox"/>
Auto Create Unknown Custom...	<input checked="" type="checkbox"/>	Name Source	Company Name
Customer Template Code	CUST000001	Name 2 Source	First Name and Last Name
Default Customer		Contact Source	First Name and Last Name
Shopify Can Update Customers	<input type="checkbox"/>	County Source	Code
Export Customer to Shopify	<input checked="" type="checkbox"/>		

- 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.



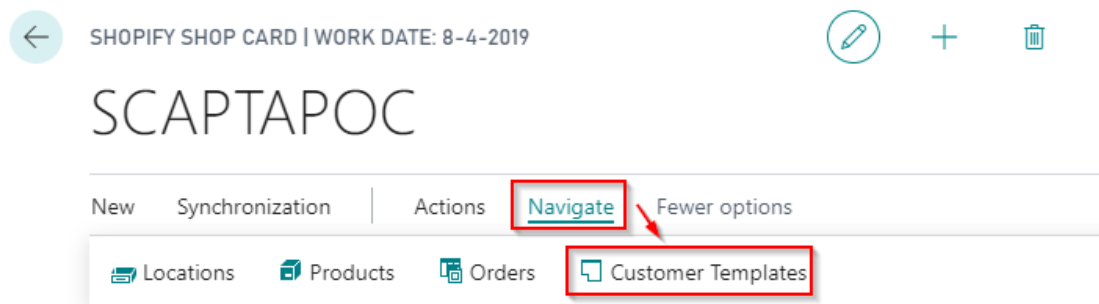
- Export customer to Shopify  
With this option, you can export all customers with a valid e-mail address from Microsoft Dynamics 365 Business Central to Shopify.
- Can update Shopify Customers  
Define if Microsoft Dynamics 365 for Business Central can only create customers or also update customers.
- 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.





← SHOPIFY CUSTOMER TEMPLATES | WORK DATE: 8-4-2019

✓ SAVED

↗

Search New Edit List Delete Page More options

Filter

	Country Code ↑		Customer Template code
	BE		CUST000001
→	US	:	CUST000002

Tax Areas

Manage

	Country ↑		Tax Area Code
	Florida		ATLANTA, GA
→	Illinois	:	CHICAGO, IL

The country codes are ISO 3166-1 alpha-2 country codes. For more information:  
<https://help.shopify.com/en/api/custom-storefronts/storefront-api/reference/enum/countrycode>

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.

Dynamics 365 Business Central Orders									
Environment: Sandbox									
CRONUS USA, Inc.   Sales   Purchasing   Approvals   Self-Service   Setup & Extensions   Intelligent Cloud Insights   Shopify									
Orders: All   Search   Delete   Process   Order   Open in Excel   Actions   Navigate   Less options									
SHOP CODE	SHOPIFY ORDER NO.	CL...	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	CREATED AT	CO...	FINANCI... STATUS	FULFILL... STATUS	TOTAL AMOUNT
FROM SHOPI...	1242			Riet Mondelaers	21-11-2018 14:39		Paid	Fulfilled	59.89
FROM SHOPI...	1243		C00010	Maxima Van Holland	18-1-2019 10:03		Paid		549.00
FROM SHOPI...	1244		C00020	Olivier Descompte	18-1-2019 10:11		Paid		1.397.30
FROM SHOPI...	1245			Fabrizio Spegona	18-1-2019 10:15		Paid		190.10

SHOPIFY CUSTOMER TEMPLATES	
Search   New   Edit List   Delete   Open in Excel	
COUNTRY CODE	CUSTOMER TEMPLATE CODE
BE	
FR	CUST FR
IT	
NL	CUST NL

## 5.3 Synchronize customers

### 5.3.1 Manually sync customers

There are two ways to go to the customer sync.

- Via 'Customers'



The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'CRONUS USA, Inc.' and various functional areas like 'Management', 'Sales', 'Purchasing', 'Setup & Extensions', 'Intelligent Cloud Insights', and 'Scaptify'. The 'Scaptify' dropdown is expanded, showing 'Connector', 'Customers', 'Products', 'Shops', and 'Orders'. The 'Customers' tab is selected. Below the navigation bar, the 'Customers' list is displayed. The 'New' button is highlighted, and a dropdown menu is open, showing 'Start Customer Sync' as the first option. Below this, a table of customers is visible, including columns for Id, Customer No., Name, E-Mail, Phone No., State, and Veri... E-Mail. Two customer records are shown: one with Id 2750249074760 and Customer No. C00040, and another with Id 2778485391432 and Customer No. 10000.

- Via the Shopify Shop Card

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar is the same as the previous screenshot. The 'Shops' tab is selected. Below the navigation bar, the 'SHOPIFY SHOP CARD | WORK DATE: 8-4-2019' is displayed. The 'SCAPTAPOC' shop card is shown. Below the shop card, the 'Synchronization' tab is selected, and a dropdown menu is open, showing 'Sync Customers' as the first option. Below this, a table of synchronization options is visible, including columns for Sync Products, Sync Product Images, Sync Inventory, Sync Customers, and Sync All.

### 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.

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar is the same as the previous screenshots. The 'Customers' tab is selected. Below the navigation bar, the 'Customers' list is displayed. The 'New' button is highlighted, and a dropdown menu is open, showing 'Start Customer Sync' as the first option. Below this, a table of customers is visible, including columns for Id, Customer No., Name, E-Mail, Phone No., State, and Veri... E-Mail. Two customer records are shown: one with Id 2750249074760 and Customer No. C00040, and another with Id 2778485391432 and Customer No. 10000.



CRONUS USA, Inc. | < Management Sales Purchasing Setup & Extensions Intelligent Cloud Insights Scaptify > |

Connector Customers Products Shops Orders

Customers: All Search New Delete Page Actions Navigate Fewer options

Id ↑	Customer No.	First Name	Last Name	E-Mail	Phone No.	State	Veri... E-Mail	Note
2750249074760	C00040	Don	Shelby	v-daumaz@microsoft.com		Disabled	✓	
2778485391432	10000	Robert	Townes	robert.townes@contoso.com		Disabled	✓	
2778485424200	20000	Helen	Ray	helen.ray@contoso.com		Disabled	✓	

← SHOPIFY CUSTOMER CARD | WORK DATE: 8-4-2019

2750249074760

New Navigate Fewer options

**General**

First Name: Don  
Last Name: Shelby  
E-Mail: v-daumaz@microsoft.com  
Phone No.:  
Accepts Marketing: ☐  
State: Disabled  
Verified E-Mail: ☒  
Note:

**Mapping**

Customer No.: C00040  
Name: Shelby inc  
Name2: Don Shelby  
Address: Adress st

**Addresses** Manage

Def...	Company	FirstName	LastName	Address1	Zip	CountryCo...
→ ✓	Shelby inc	Don	Shelby	Adress st	71119	LT

## 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.



CRONUS USA, Inc. | < Cash Management Sales Purchasing Setup & Extensions Intelligent Cloud Insights Scaptify >

Connector Customers Products Shops **Orders**

Orders: All Search Delete Process Order Page Actions Navigate Fewer options

Shop Code	Shopify Order No.	Clos...	Sell-to Customer No.	Sell-to Customer Name	Created At	Con...	Financial Status	Fulfillment Status	Total Amount	Pro...	Sales On No.
SCAPTAPOC	WEB1273	<input type="checkbox"/>		Riet Mondelaers	27-2-2020 11:45	<input checked="" type="checkbox"/>	Paid		59,99	<input type="checkbox"/>	

← SHOPIFY ORDER | WORK DATE: 8-4-2019 + ✓ SAVED

### WEB1273 · Riet Mondelaers

**Process** Order Actions Navigate Fewer options

Create Sales Document **Create New Customer**

Shop Code	SCAPTAPOC	Test	<input type="checkbox"/>
Shopify Order No.	WEB1273	Created At	27-2-2020 11:45
Customer Template Code	CUST000001	Document Date	27-2-2020
Sell-to Customer No.	<input type="text"/>	Processed	<input type="checkbox"/>
Closed	<input type="checkbox"/>	Financial Status	Paid

In the Shopify Shop Customer List, you can select open the Shopify customer card and select an existing customer.



←

SHOPIFY CUSTOMER CARD | WORK DATE: 8-4-2019

+

✓ SAVED

3000333271112

New

Navigate

Fewer options

General

First Name ..... Riet

Last Name ..... Mondelaers

E-Mail ..... rietmondelaers@gmail.com

Phone No. ....

Accepts Marketing ..... ☐

State ..... Disabled

Verified E-Mail ..... ☒

Note .....

Mapping

Customer No. ....

Name .....

Name2 .....

Address .....

Addresses

Manage

→

☒

Scapta

Riet

Mondelaers

Kempische Steenweg

3500

BE



## 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 ..... 50100 ..... Tax Area Source ..... No Taxes .....  
 Shopify Order No. on Doc. Line .. ☒

- **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.

← SALES ORDER | WORK DATE: 8-4-2019 ✎ + 🗑

### S-ORD101006 · Riet Mondelaers

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Report Fewer options

#### General Show more

Customer Name ..... Riet Mondelaers ..... Due Date ..... 27-3-2020 .....  
 Contact ..... Riet Mondelaers ..... Requested Delivery Date .....  
 Posting Date ..... 8-4-2019 ..... External Document No. ....  
 Order Date ..... 8-4-2019 .....

#### Scaptify

Shopify Order No. .... WEB1273

Lines | Manage Line Order Page Fewer options 🔍

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit I
→ Comment		Shopify Order No.: WEB1273				-		
Item	1928-S	Blue		1		-	PCS	
G/L Account	50100	DHL		1		-		

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



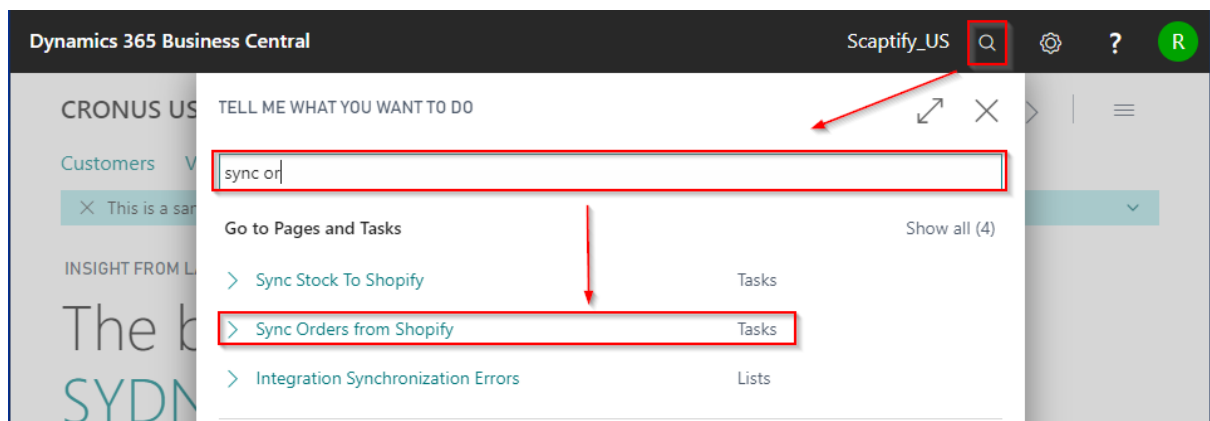
- No taxes
- Ship-to > Sell-to > Bill-to
- Ship-to > Bill-to > Sell-to
- Sell-to > Ship-to > Bill-to
- Sell-to > Bill-to > Ship-to
- Bill-to > Sell-to > Ship-to
- Bill-to > Ship-to > Sell-to

## 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:

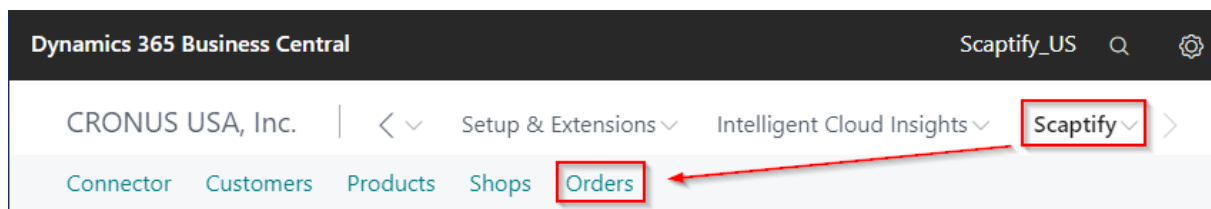




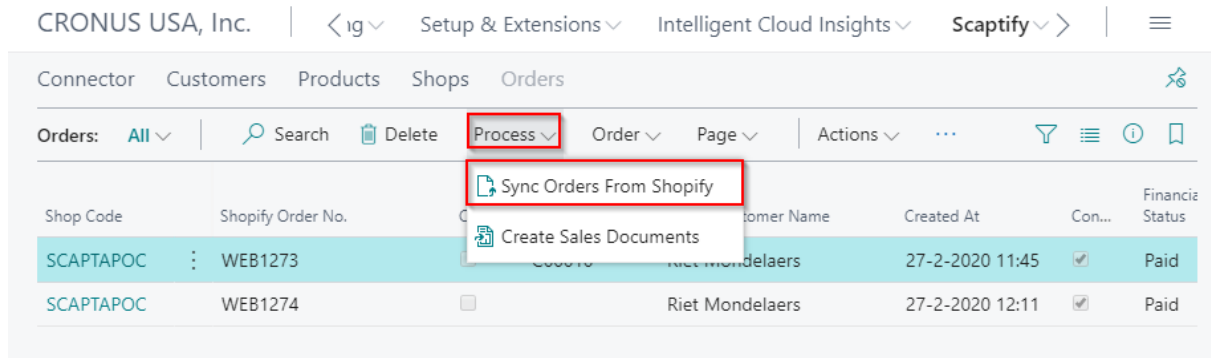
When executing this task, the Shopify Orders are imported in Dynamics 365 Business Central.

### 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'.



←

JOB QUEUE ENTRY CARD

✎

+

🗑

Report · 70007602 · Sync Orders from Shopify

Process

Report

Actions

Navigate

Less options

Job Queue

Set Status to Ready

Set On Hold

Show Error

Restart

Report

70007602

Sync Orders from Shopify

Description

Sync Orders from Shopify

Earliest Start Date/Time

Status

On Hold

Report Parameters

Report Request Page Opti...

Printer Name

Report Output Type

None (Processing only)

Recurrence

Recurring Job

Run on Mondays

Run on Tuesdays

Run on Wednesdays

Run on Thursdays

Run on Fridays

Run on Saturdays

Run on Sundays

Starting Time

Ending Time

No. of Minutes between ...

Inactivity Timeout Period

## 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



Dynamics 365 Business Central

Scaptify\_US

CRONUS USA, Inc. | < es v Purchasing v Setup & Extensions v Intelligent Cloud Insights v **Scaptify v** |

Connector Customers Products Shops **Orders**

Orders: All v Search Delete Process v Order v Page v Actions v Navigate v

Shop Code	Shopify Order No.	Clos...	Sell-to Customer No.	Sell-to Customer Name	Created At	Con...	Financial Status	Fulfillment Status
SCAPTAPOC	WEB1273	<input type="checkbox"/>	C00010	Riet Mondelaers	27-2-2020 11:45	<input checked="" type="checkbox"/>	Paid	
SCAPTAPOC	WEB1274	<input type="checkbox"/>		Riet Mondelaers	27-2-2020 12:11	<input checked="" type="checkbox"/>	Paid	

### 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.

← SHOPIFY SHOP CARD | WORK DATE: 8-4-2019

SCAPTAPOC

New Synchronization | Actions **Navigate** Fewer options

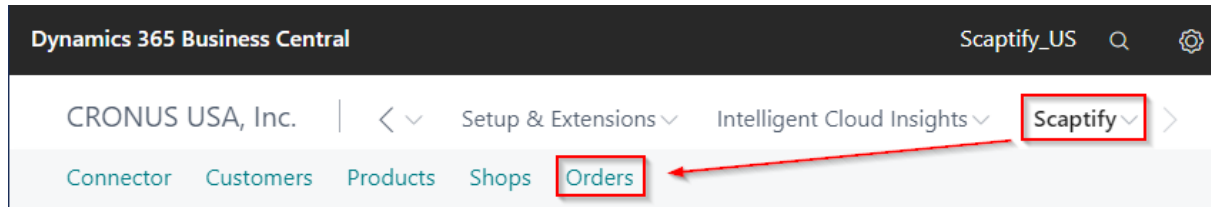
Locations Products **Orders** Customer Templates

← SHOPIFY ORDERS | WORK DATE: 8-4-2019





Shop Code	Shopify Order No.	Clos...	Sell-to Customer No.	Sell-to Customer Name	Created At	Con...	Financial Status	Fulfillment Status
SCAPTAPOC	WEB1272	<input checked="" type="checkbox"/>	C00010	Riet Mondelaers	26-2-2020 11:39	<input checked="" type="checkbox"/>	Paid	Fulfilled
SCAPTAPOC	WEB1273	<input type="checkbox"/>	C00010	Riet Mondelaers	27-2-2020 11:45	<input checked="" type="checkbox"/>	Paid	
SCAPTAPOC	WEB1274	<input type="checkbox"/>		Riet Mondelaers	27-2-2020 12:11	<input checked="" type="checkbox"/>	Paid	

### 6.4 Process Shopify Orders

Navigate to the Shopify Orders.





Edit the Shopify order.

SHOPIFY ORDER | WORK DATE: 8-4-2019  +  ✓ SAVED  

### WEB1273 · Riet Mondelaers

Process Order | Actions Navigate Fewer options 1

Shopify Order No. ....	WEB1273	Created At .....	27-2-2020 11:45
Customer Template Code .. *	<input type="text"/>	Document Date .....	27-2-2020 
Sell-to Customer No. ....	C00010	Processed .....	<input type="checkbox"/>
Closed .....	<input type="checkbox"/>	Financial Status .....	Paid
SELL-T0		Fulfillment Status .....	
Name .....	Riet Mondelaers	Sales Order No. ....	S-ORD101006
Address .....	Nieuwstraat 22	Sales Invoice No. ....	
Address 2 .....		Error .....	<input type="checkbox"/>
Post Code .....	1000	Error Message .....	
City .....	Brussel	Work Description .....	<input type="text"/>
Email .....	riet.mondelaers@scapta.com		
Phone No. ....			

Lines 

Item No.	Unit of Measure Code	Variant Code	Description	Variant Description	Quantity	Unit Price
→ 1928-S	PCS	BLUE	AMSTERDAM Lamp	BLUE / PCS	1	55,00

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.



SHOPIFY ORDER | WORK DATE: 8-4-2019



✓ SAVED



### WEB1273 · Riet Mondelaers

Process **Order** Actions Navigate Fewer options

Transactions Shipping Costs Fulfillments Sales Order Sales Invoice Shopify Status Page

Shop Code	SCAPTAPOC	Test	<input type="checkbox"/>
Shopify Order No.	WEB1273	Created At	27-2-2020 11:45
Customer Template Code	*	Document Date	27-2-2020
Sell-to Customer No.	C00010	Processed	<input type="checkbox"/>
Closed	<input type="checkbox"/>	Financial Status	Paid
SELL-TO		Fulfillment Status	
Name	Riet Mondelaers	Sales Order No.	S-ORD101006
Address	Nieuwstraat 22	Sales Invoice No.	
Address 2		Error	<input type="checkbox"/>
Post Code	1000	Error Message	
City	Brussel	Work Description	
Email	riet.mondelaers@scapta.com		
Phone No.			

Lines

Item No.	Unit of Measure Code	Variant Code	Description	Variant Description	Quantity	Unit Price
→ 1928-S	PCS	BLUE	AMSTERDAM Lamp	BLUE / PCS	1	55,00

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".



← SHOPIFY ORDER | WORK DATE: 8-4-2019 ✎ + 🗑 ✓ SAVED 🔗 🔍

### WEB1272 · Riet Mondelaers

**Process** | Order | Actions | Navigate | Fewer options

📄 Create Sales Document 👤 Create New Customer

Shop Code .....	SCAPTAPOC	Test .....	<input type="checkbox"/>
Shopify Order No. ....	WEB1272	Created At .....	26-2-2020 11:39
Customer Template Code .. *	<input type="text"/>	Document Date .....	26-2-2020 <span>📅</span>
Sell-to Customer No. ....	C00010	Processed .....	<input type="checkbox"/>

A sales order is now created, and can be handled by using the standard Dynamics 365 Business Central functionalities.

SHOPIFY ORDER | WORK DATE: 8-4-2019 ✎ + 🗑 ✓ SAVED 🔗 🔍

### WEB1273 · Riet Mondelaers

Process | **Order** | Actions | Navigate | Fewer options

📄 Transactions 📄 Shipping Costs 📄 Fulfillments 📄 **Sales Order** 📄 Sales Invoice 🌐 Shopify Status Page

Shop Code .....	SCAPTAPOC	Test .....	<input type="checkbox"/>
Shopify Order No. ....	WEB1273	Created At .....	27-2-2020 11:45
Customer Template Code .. *	<input type="text"/>	Document Date .....	27-2-2020 <span>📅</span>
Sell-to Customer No. ....	C00010	Processed .....	<input type="checkbox"/>
Closed .....	<input type="checkbox"/>	Financial Status .....	Paid
SELL-TO		Fulfillment Status .....	
Name .....	Riet Mondelaers	<b>Sales Order No. ....</b>	<b>S-ORD101006</b>
Address .....	Nieuwstraat 22	Sales Invoice No. ....	
Address 2 .....		Error .....	<input type="checkbox"/>
Post Code .....	1000	Error Message .....	
City .....	Brussel	Work Description .....	<input type="text"/>
Email .....	riet.mondelaers@scapta.com		
Phone No. ....			

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.



SALES ORDER | WORK DATE: 8-4-2019



✓ SAVED



### S-ORD101006 · Riet Mondelaers

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate ⓘ

#### General

Show more

Customer Name	Riet Mondelaers	Due Date	27-3-2020
Contact	Riet Mondelaers	Requested Delivery Date	
Posting Date	8-4-2019	External Document No.	
Order Date	8-4-2019		

#### Scaptify

Shopify Order No. WEB1273

Lines	Manage	Line	Order	Page	Fewer options		
Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure
→ Comment	:	Shopify Order No.: WEB1273				-	
Item	1928-S	Blue		1		-	PCS
G/L Account	50100	DHL		1		-	

### 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:



TELL ME WHAT YOU WANT TO DO

Go to Pages and Tasks

> Job Queue Entries

Lists

> Job Queue Categories

Lists

> Job Queue Log Entries

Lists

Define the recurrence of the job queue 'Process Shopify Orders' and start the job queue.

←

JOB QUEUE ENTRY CARD

✎

+

🗑

## Report · 70007605 · Shopify Create Sales Orders

Process

Report

Actions

Navigate

Less options

Job Queue

Set Status to Ready

Set On Hold

Show Error

Restart

Report

70007605

Shopify Create Sales Orders

Description

Shopify Create Sales Orders

Earliest Start Date/Time

Status

On Hold

### Report Parameters

Report Request Page Opti...

Printer Name

Report Output Type

None (Processing only)

### Recurrence

Recurring Job

Run on Mondays

Run on Tuesdays

Run on Wednesdays

Run on Thursdays

Run on Fridays

Run on Saturdays

Run on Sundays

Starting Time

Ending Time

No. of Minutes between ...

Inactivity Timeout Period





### 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.

Beantwoorden Alleen beantwoorden Doorsturen IM

wo 21/11/2018 14:44



Scapta <Scabo365@scapta.com>

A shipment from order #1242 is on the way

Aan Riet Mondelaers

Als er problemen zijn met de weergave van dit bericht, klikt u hier om het in een webbrowser te bekijken.

Documentkoppelingen

Scapta

ORDER #1242

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

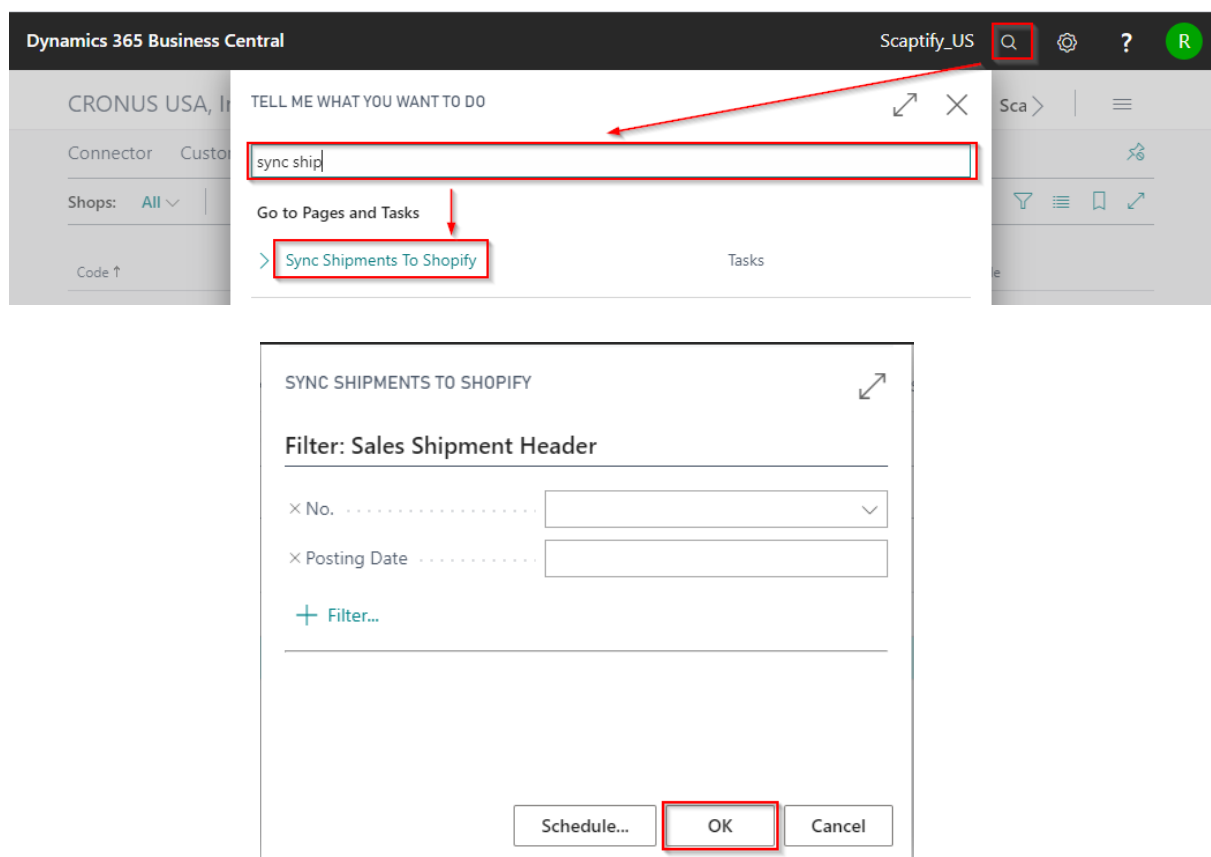
If you have any questions, reply to this email or contact us at [Scabo365@scapta.com](mailto:Scabo365@scapta.com)



### 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.



### 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:



TELL ME WHAT YOU WANT TO DO

job queue

Go to Pages and Tasks

> Job Queue Entries	Lists
> Job Queue Categories	Lists
> Job Queue Log Entries	Lists

Define the recurrence of the job queue 'Sync Shipments to Shopify' and start the job queue.

← JOB QUEUE ENTRY CARD

Report · 70007601 · Sync Shipments To Shopify

Process Report **Actions** Navigate Less options

Job Queue

- Set Status to Ready
- Set On Hold
- Show Error
- Restart

Report 70007601 Sync Shipments To Shopify

Description Sync Shipments To Shopify

Earliest Start Date/Time

Status On Hold

**Report Parameters**

Report Request Page Opti... ☒

Printer Name

Report Output Type None (Processing only)

**Recurrence**

Recurring Job ☐

Run on Mondays ☒

Run on Tuesdays ☒

Run on Wednesdays ☒

Run on Thursdays ☒

Run on Fridays ☒

Run on Saturdays ☐

Run on Sundays ☐

Starting Time

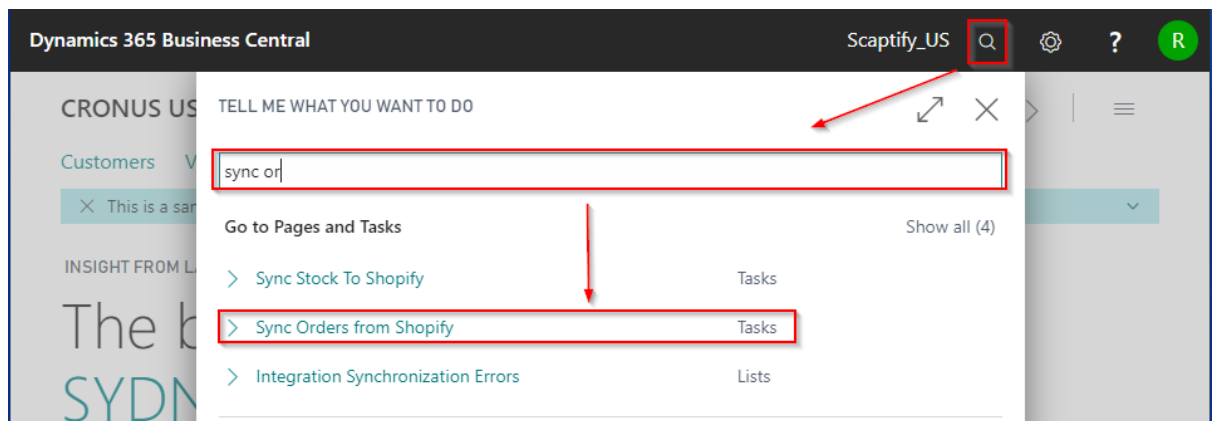
Ending Time

No. of Minutes between ... 0

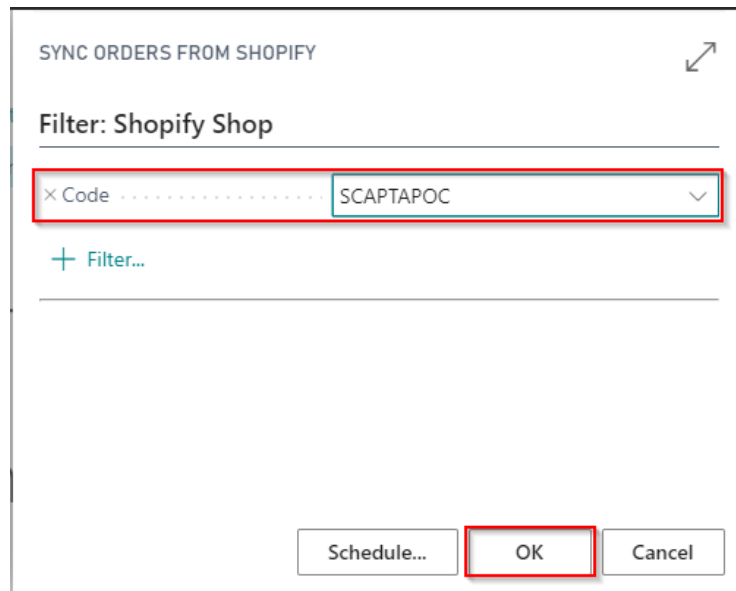
Inactivity Timeout Period 0

### 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



Dynamics 365 Business Central

Scaptify\_US

CRONUS USA, Inc. | <agement Sales Purchasing Setup & Extensions Intelligent Cloud Insights Scaptify

Connector Customers Products Shops Orders

← 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

Shop Code	Shopify Order No.	Clos...	Sell-to Customer No.	Sell-to Customer Name	Created At	Con...	Financial Status	Fulfillment Status	Total Amount
SCAPTAPOC	WEB1272	✓	C00010	Riet Mondelaers	26-2-2020 11:39	✓	Paid	Fulfilled	59,89
SCAPTAPOC	WEB1273	□	C00010	Riet Mondelaers	27-2-2020 11:45	✓	Paid		59,99
SCAPTAPOC	WEB1274	□		Riet Mondelaers	27-2-2020 12:11	✓	Paid		652,79



## 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.

SHOPIFY SHOP CARD | WORK DATE: 8-4-2019 ✎ + 🗑 ✓ SAVED 🔗 🔍

### SCAPTAPOC

New Synchronization **Actions** Navigate Fewer options

Sync ▾

- Reset Sync ▾
- Reset Products Sync
- Reset Customer Sync
- Reset Orders Sync

Code ..... PTAPOC

Shopify URL ..... s://scaptapoc.myshopify.com/

API Key ..... 02522f4f057681cf8d01e7336c670

Password .....

Language Code ..... ENU ▾

Log Activated ..... ☒

Allow Background Syncs ..... ☐

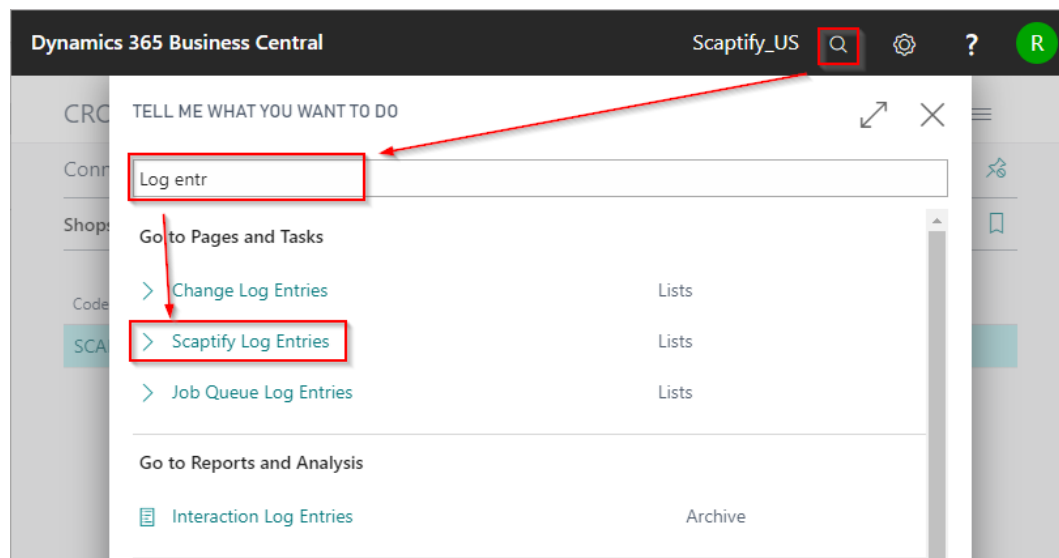
## 8. Troubleshooting

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

**General**

Code .....	SCAPTAPOC	Language Code .....	ENU
Shopify URL .....	https://scaptapoc.myshopify.com/	Log Activated .....	<input checked="" type="checkbox"/>
API Key .....	25b02522f4f057681cf8d01e7336c670	Allow Background Syncs .....	<input type="checkbox"/>
Password .....	*****		

After you start the synchronization task again, you can check the Scaptify Log Entries for any errors / information:



The screenshot shows the Dynamics 365 Business Central interface. At the top, there is a search bar labeled 'Scaptify\_US'. Below it, a search results pane is open, showing a list of options. The option 'Scaptify Log Entries' is highlighted with a red box. A red arrow points from the search bar to this option.

← SCAPTIFY LOG ENTRIES | WORK DATE: 8-4-2019

Entry No. ↑	Date and Time	Time	User ID	URL	Method	Status Code	Status Description
790	27-2-2020 11:51	11:51:42	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK
791	27-2-2020 11:51	11:51:43	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK
792	27-2-2020 11:51	11:51:44	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK
793	27-2-2020 11:51	11:51:44	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK
794	27-2-2020 11:51	11:51:45	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK



←

SCAPTIFY LOG ENTRY | WORK DATE: 8-4-2019

790

Algemeen

Entry No. ....	790	URL .....	<a href="https://scaptapoc.myshopi...">https://scaptapoc.myshopi...</a>
Date and Time .....	27-2-2020 11:51	Method .....	POST
Time .....	11:51:42	Status Code .....	200
User ID .....	RIET.MONDELAERS	Status Description ...	OK

Data

Request .....

```
{ "query": "mutation  
{ productUpdate(input:  
  { id:  
    "gid://shopify/Product/44  
    83607265352
```

Response .....

```
{ "data": { "productUpdate":  
  { "product": { "id": "gid:  
    /  
    /shopify  
    /Product
```

Make sure to disable the logging when not needed, or to delete the entries periodically.

SCAPTIFY LOG ENTRIES | WORK DATE: 8-4-2019

Search Manage **Log Entries** Page Actions Fewer options

Delete Entries...er Than 7 Days Delete All Entries

790	27-2-2020 11:51	11:51:42	RIET.MONDE...	<a href="https://scaptapoc.myshopify.co...">https://scaptapoc.myshopify.co...</a>	POST	200	OK
791	27-2-2020 11:51	11:51:43	RIET.MONDE...	<a href="https://scaptapoc.myshopify.co...">https://scaptapoc.myshopify.co...</a>	POST	200	OK
792	27-2-2020 11:51	11:51:44	RIET.MONDE...	<a href="https://scaptapoc.myshopify.co...">https://scaptapoc.myshopify.co...</a>	POST	200	OK
793	27-2-2020 11:51	11:51:44	RIET.MONDE...	<a href="https://scaptapoc.myshopify.co...">https://scaptapoc.myshopify.co...</a>	POST	200	OK