



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/>.

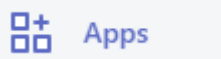
More information about how to create and personalize your Shopify store can be found at <https://help.shopify.com/>.

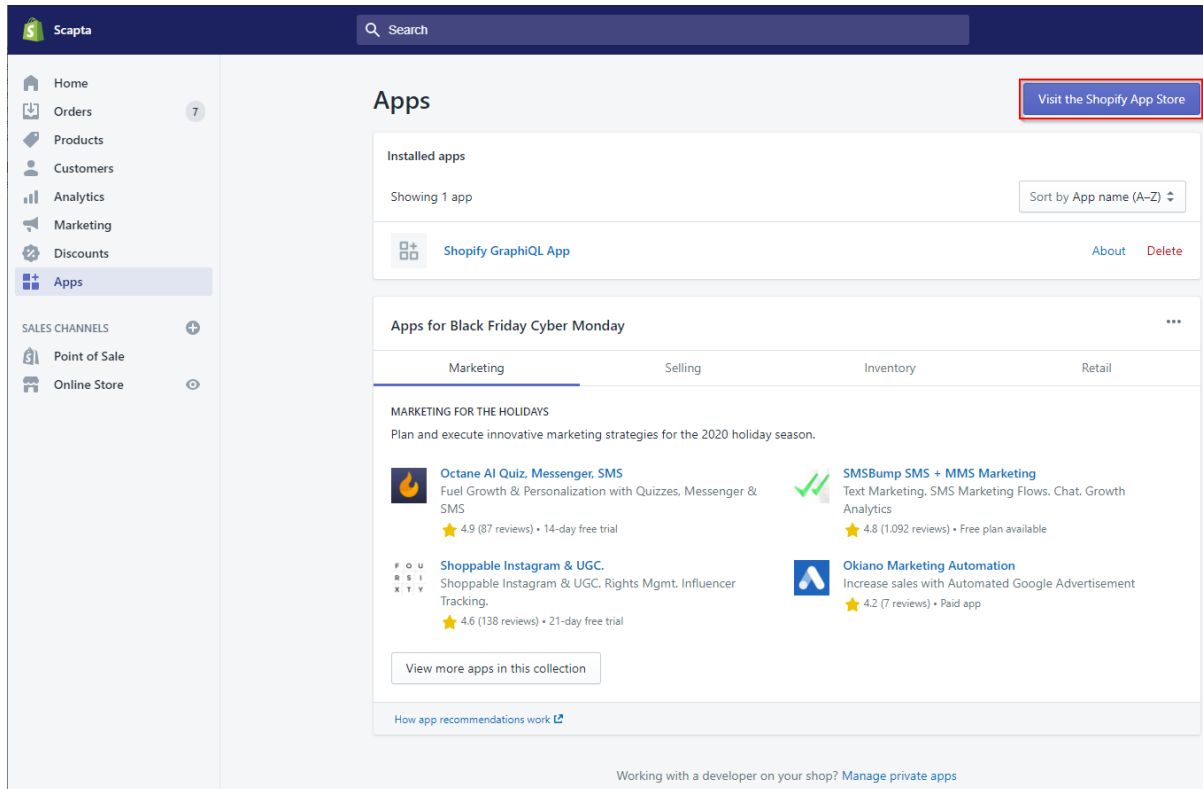
2.1.2 Configure Shopify Account

2.1.2.1 Install the Scaptify app

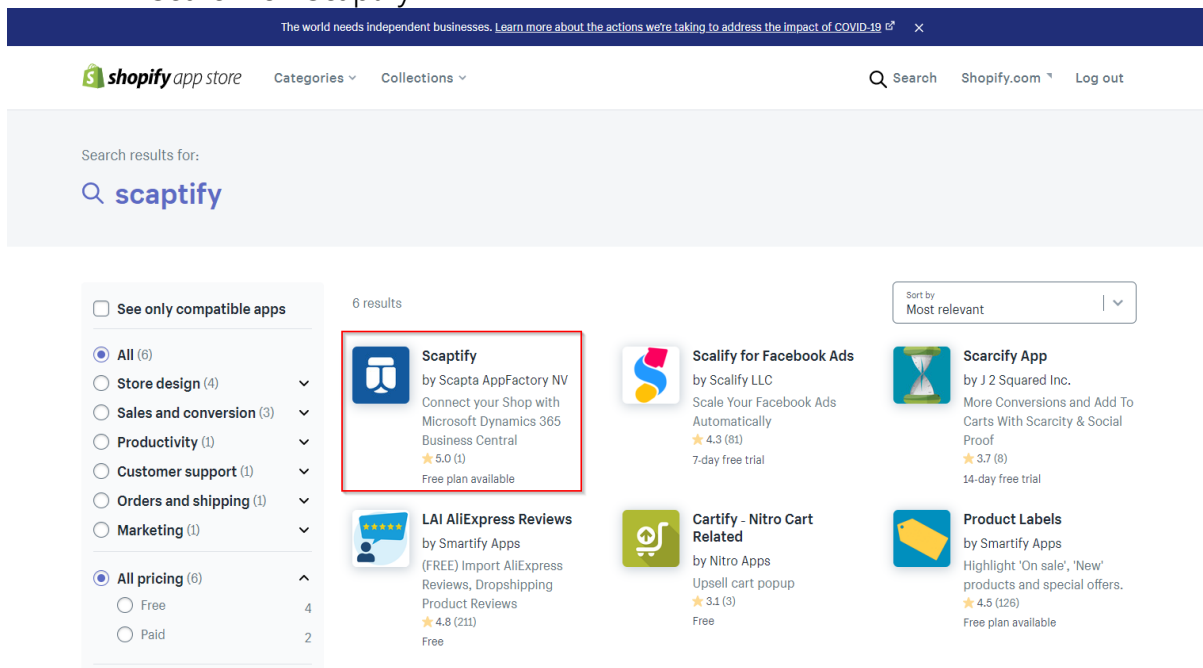
In order to allow Microsoft Dynamics 365 Business Central to securely connect to Shopify, you need to install the Scaptify app. It will create application credentials in Shopify that Microsoft Dynamics 365 Business Central will use to connect to Shopify.

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"

- Click 'Visit the Shopify App Store'.




- Search for 'Scaptify'





 **shopify app store** Categories ▾ Collections ▾

ORDERS AND SHIPPING | CUSTOMER SUPPORT



Scaptify


by [Scapta AppFactory NV](#)

Connect your Shop with Microsoft Dynamics 365 Business Central

★ 5.0 ([1 review](#))

Add app

Free plan available. Additional charges may apply.

 **Scapta**

Home

Orders 7

Products

Customers

Analytics

Marketing

Discounts

Apps



SALES CHANNELS +

Point of Sale

Online Store

Settings

You are about to install Scaptify

App support provided by Scapta AppFactory NV

Scaptify will be able to:

View Shopify account data

View details

Manage products

View details

Manage orders

View details

Manage customers

View details

Manage gift cards

View details

Manage your Online Store

View details

View Shopify Payments

View details

Manage other data

View details

To erase your customers' personal information from Scaptify, remove the app. After 48 hours, a request will be sent to Scaptify to erase this data. [Learn more about data privacy.](#)


Cancel

Install app

Scapta Appfactory nv. Kempische Steenweg 293 bus 38, 3500 Hasselt
Tel: +32 (0) 11 600 600 | Email : scaptify@scapta.com

6

Approve subscription



Scaptify
by Scapta AppFactory NV

Freemium
\$0.00 USD every 30 days
Additional fees may apply up to a maximum of \$999.00 USD

30 orders included, \$0.99 per additional order

On your next bill

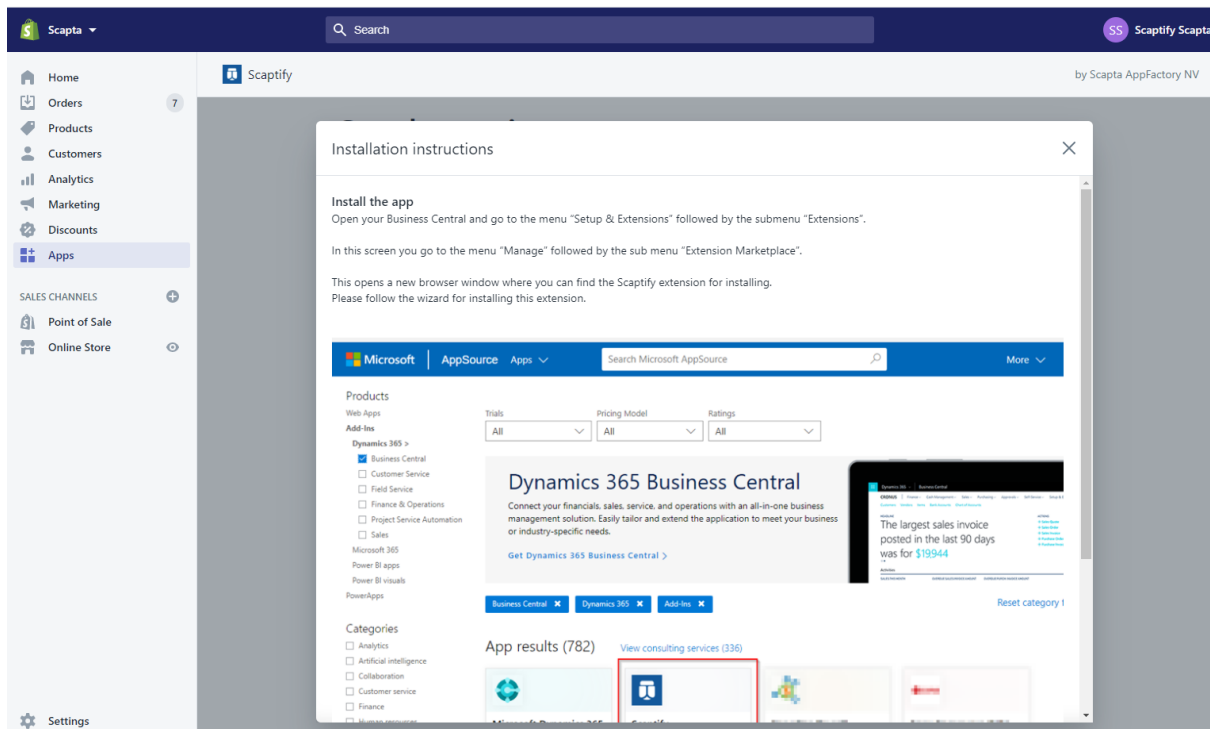
Freemium
\$0.00 USD
Recurring every 30 days
Starts today

Charged now **\$0.00 USD**

Approve subscription

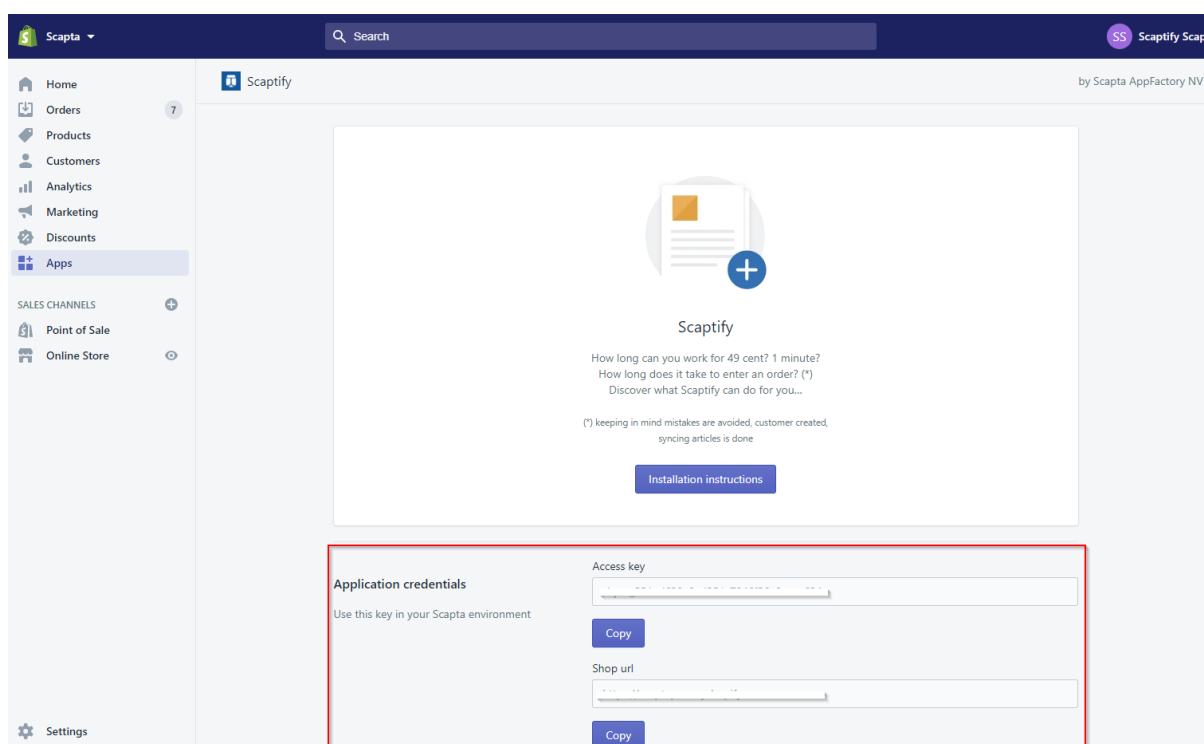
By proceeding, you are agreeing to the [Terms of Service](#).
Subject to government tax and other prevailing charges.

- You will get some installation instructions how to install the Scaptify app in Dynamics 365 Business Central.



The screenshot shows the Scapta app interface within a Dynamics 365 Business Central environment. The left sidebar contains navigation options: Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels, Point of Sale, and Online Store. The main content area displays the 'Scaptify' app by Scapta AppFactory NV. A modal window titled 'Installation instructions' is open, providing detailed steps for installing the app. The instructions include navigating to 'Setup & Extensions' and 'Extensions' in Business Central, then to 'Manage' and 'Extension Marketplace'. A screenshot of the Microsoft AppSource interface is shown, highlighting the 'Dynamics 365 Business Central' app. The AppSource interface shows a search bar, filters for Products, Trials, Pricing Model, and Ratings, and a list of app results. The 'Dynamics 365 Business Central' app is highlighted in the results, showing its description and a 'Get Dynamics 365 Business Central' button. The 'App results (782)' section is visible at the bottom of the AppSource interface.

- When you close the installation instructions, you see the application credentials.
This information will be used later on in the setup of Microsoft Dynamics 365 Business Central.



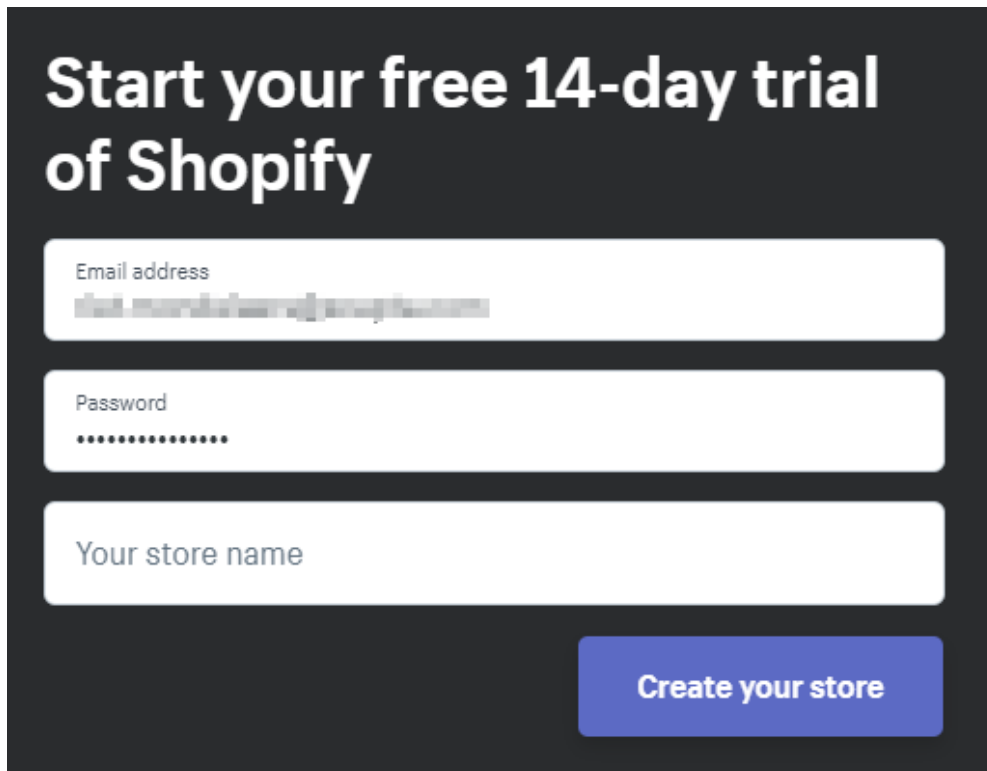
If you want to consult this information later, you can go to 'Apps' and select the Scaptify app.

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/>.

A screenshot of the Shopify sign-up form. The form is titled "Start your free 14-day trial of Shopify" in white text on a dark background. Below the title are three white input fields: "Email address" (containing a blurred email), "Password" (containing eight dots), and "Your store name". A blue button labeled "Create your store" is positioned to the right of the "Your store name" field.

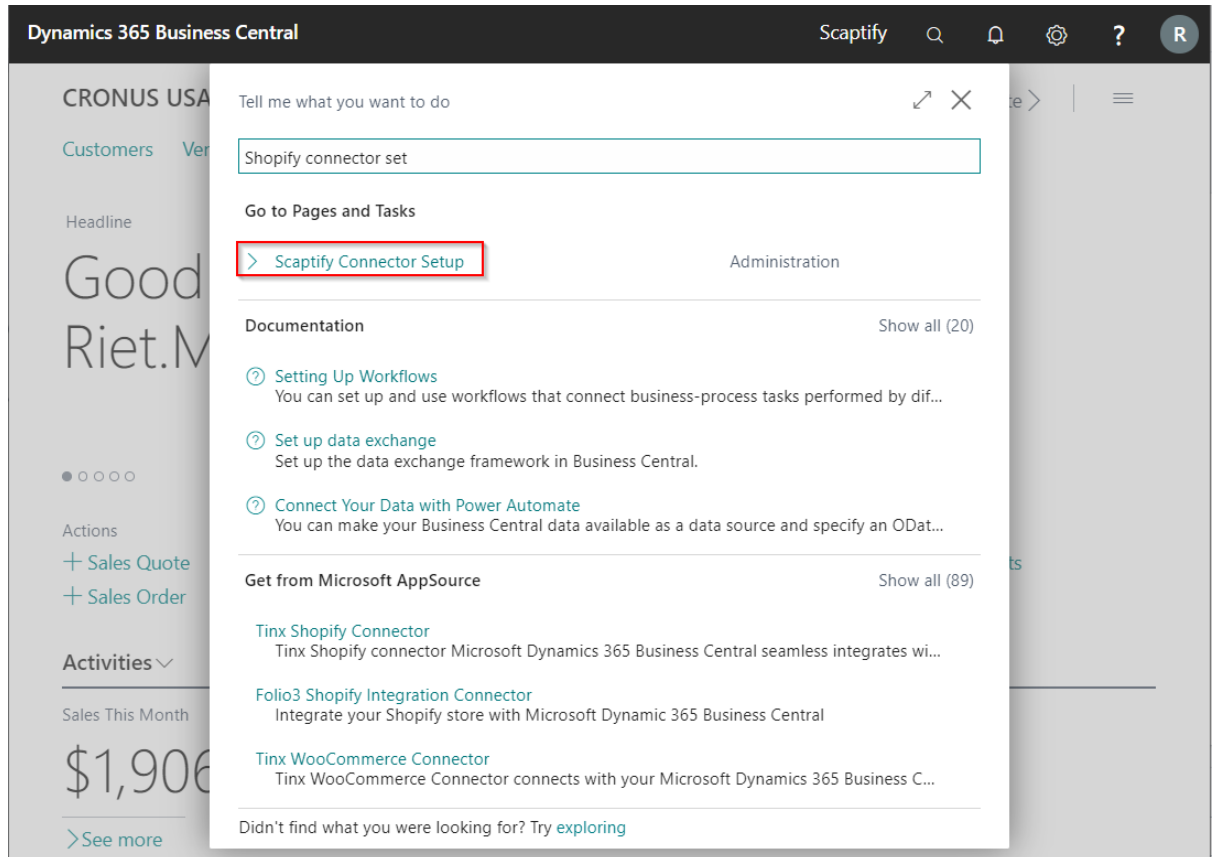
Remark: 'Your store name' is the name of the Shopify store you created.

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 search function and choose 'Shopify Connector Setup'



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.



SCAPTIFY REGISTRATION



THAT'S IT!

Choose Finish to save the Scaptify Connector setup.

Back

Next





Finish

 Registered



OK

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





Scaptify Connector Setup

 Register  Shops | More options

Connector Info

License Key {36c9d532-f048-4b1f-8d5b-f2ae566a43c7} Shopify App Type Public Scaptify App on Shopify ▾

Version 16.7.0.4

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 

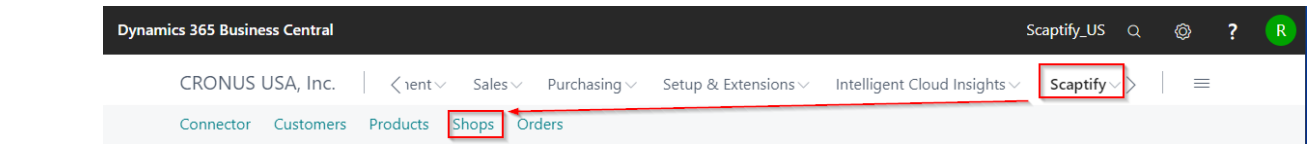
Connector Info

License Key {52a4c3a6-73ad-42b7-90d8-a5...} Version 15.6.0.0

Partner >

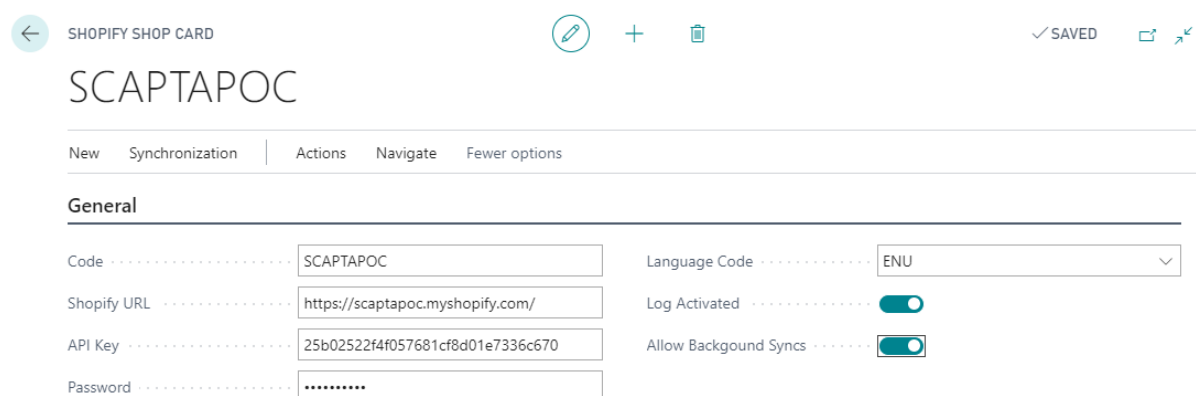
Restrictions >

- Or follow the path 'Scaptify > Shops'



The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Dynamics 365 Business Central', 'Scaptify_US', and a search icon. Below this, the 'Scaptify' menu is highlighted with a red box, and the 'Shops' option is also highlighted with a red box. The main content area shows the 'SHOPIFY SHOP CARD' for 'SCAPTAPOC'. The card has tabs for 'New', 'Synchronization', 'Actions', 'Navigate', and 'Fewer options'. The 'General' tab is active, showing fields for 'Code' (SCAPTAPOC), 'Shopify URL' (https://scaptapoc.myshopify.com/), 'API Key' (25b02522f4f057681cf8d01e7336c670), 'Password' (masked), 'Language Code' (ENU), 'Log Activated' (checked), and 'Allow Background Syncs' (unchecked).

Link your Shopify Shop.



This screenshot shows the 'SCAPTAPOC' Shopify Shop Card in the Dynamics 365 Business Central interface. The 'General' tab is active, and the 'Allow Background Syncs' toggle is now checked. The other fields remain the same as in the previous screenshot.



- Enter a Code for your Shopify Shop.
- Enter the URL of your Shopify Store, together with the API Key and the password.
See [Install Scaptify app](#).
- 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 Extended Text	<input checked="" type="checkbox"/>
Auto Create Unknown Items ..	<input checked="" type="checkbox"/>	Sync Item Attributes	<input checked="" type="checkbox"/>
Shopify Can Update Items	<input checked="" type="checkbox"/>	Variant Prefix	<input type="text" value="V_"/>
Can Update Shopify Products ..	<input type="checkbox"/>	SKU Type	<input type="text" value="Item No. + Variant Code"/>
Item Template Code	<input type="text" value="ITEM000001"/>	SKU Field Separator	<input type="text" value="/"/>
Sync Item Images	<input type="text" value="From Shopify"/>		

- 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 Tracked ☒ Default Inventory Policy

- 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"/>	Shopify Order No. on Doc. ...	<input checked="" type="checkbox"/>
Sold Gift Card Account	<input type="text"/>	Auto Create Orders	<input checked="" type="checkbox"/>
Tip Account	<input type="text"/>	Tax Area Source	No Taxes

The last step is to do some settings for order processing.

- Enter the 'Shipping cost Account', the Sold Gift Card account and the Tip 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.

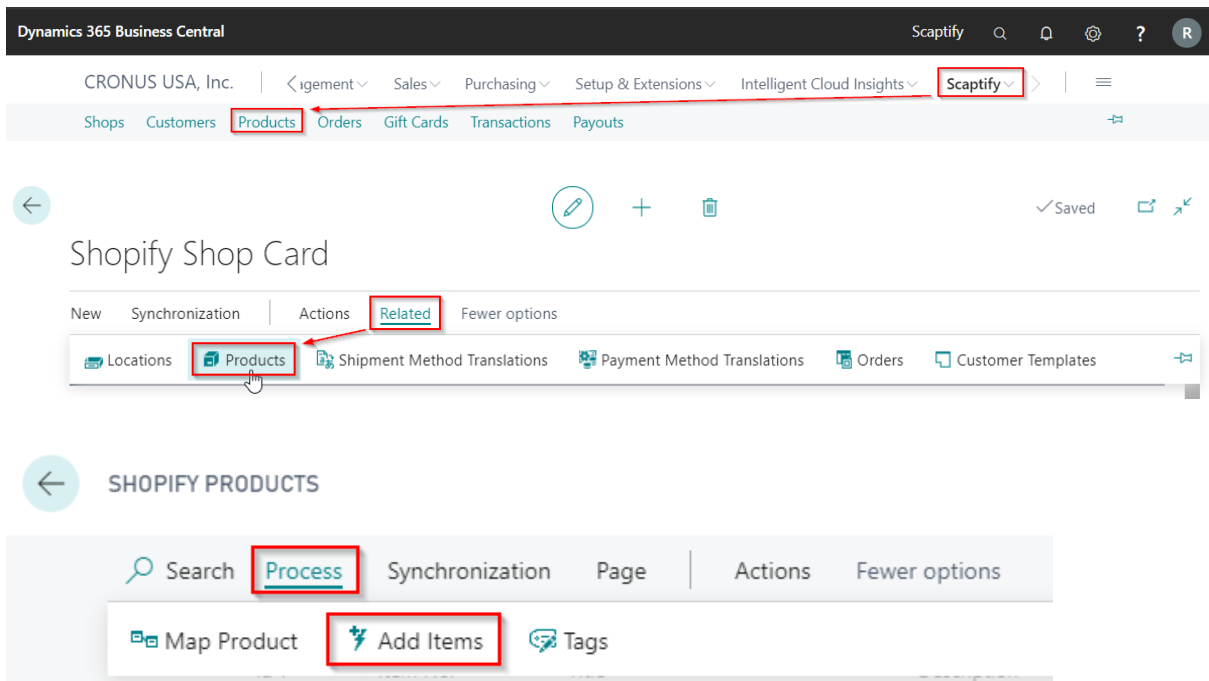
Item Synchronization

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 ITEM000001 ▼ Customer Price Group WEBSHOP ▼ Customer Discount Group LARGE ACC ▼	Sync Item Images To Shopify ▼ Sync Item Extended Text <input checked="" type="checkbox"/> Sync Item Attributes <input checked="" type="checkbox"/> Variant Prefix V_ 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
 - 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.



The screenshot shows the Dynamics 365 Business Central interface. At the top, the 'Scaptify' app is selected in the navigation bar. Below this, the 'Products' tab is highlighted in the main navigation area. The 'Shopify Shop Card' is displayed, with the 'Related' tab selected. In the 'Related' tab, the 'Products' option is highlighted. Below this, the 'SHOPIFY PRODUCTS' section is shown, with the 'Process' tab selected. In the 'Process' tab, the 'Add Items' button is highlighted.



SHOPIFY ADD ITEM TO SHOPIFY

GroupName

ShopCode

SCAPTAPOC

▼

Filter: Item

× No.

192*

▼

+ Filter...

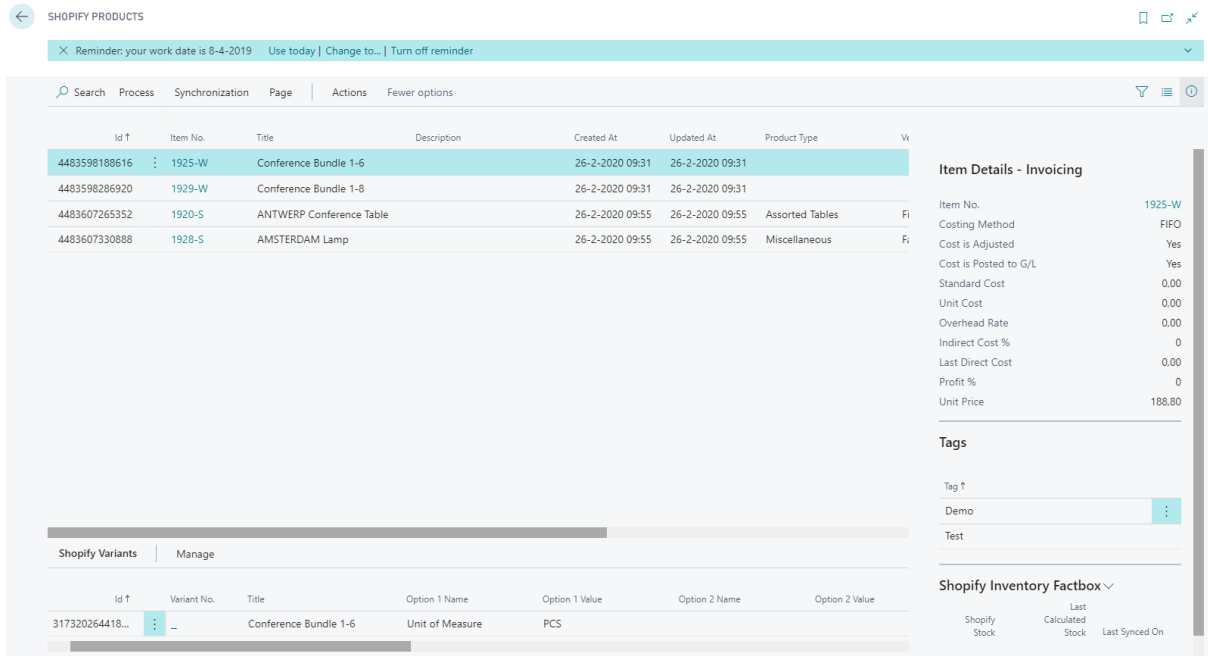
Filter totals by:

+ Filter...

Schedule...

OK

Cancel



The screenshot shows the 'SHOPIFY PRODUCTS' page. 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 row is highlighted in blue.

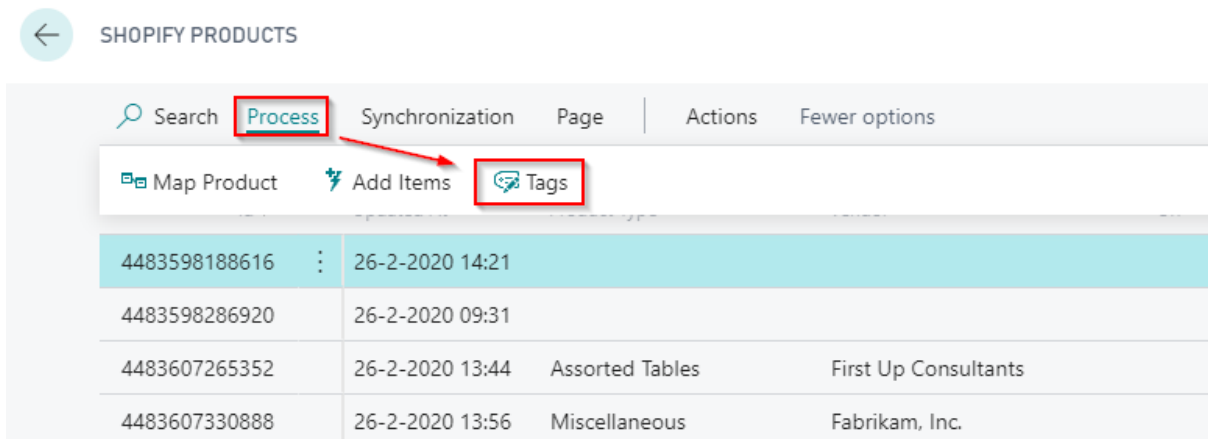
Id ↑	Item No.	Title	Description	Created At	Updated At	Product Type	W
4483598188616	1925-W	Conference Bundle 1-6		26-2-2020 09:31	26-2-2020 09:31		
4483598286920	1929-W	Conference Bundle 1-8		26-2-2020 09:31	26-2-2020 09:31		
4483607265352	1920-S	ANTWERP Conference Table		26-2-2020 09:55	26-2-2020 09:55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

On the right, the 'Item Details - Invoicing' section shows various cost and pricing details for the selected item (1925-W). Below this, the 'Tags' section shows 'Demo' and 'Test' tags. At the bottom, the 'Shopify Inventory Factbox' shows 'Shopify Stock', 'Last Calculated Stock', and 'Last Synced On'.

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' page with the 'Process' menu highlighted. The 'Process' menu is open, showing options: 'Map Product', 'Add Items', and 'Tags'. The 'Tags' option is highlighted with a red box and a red arrow pointing to it. Below the menu, the table shows the same product list as the previous screenshot.

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		



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...
4483598286920	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

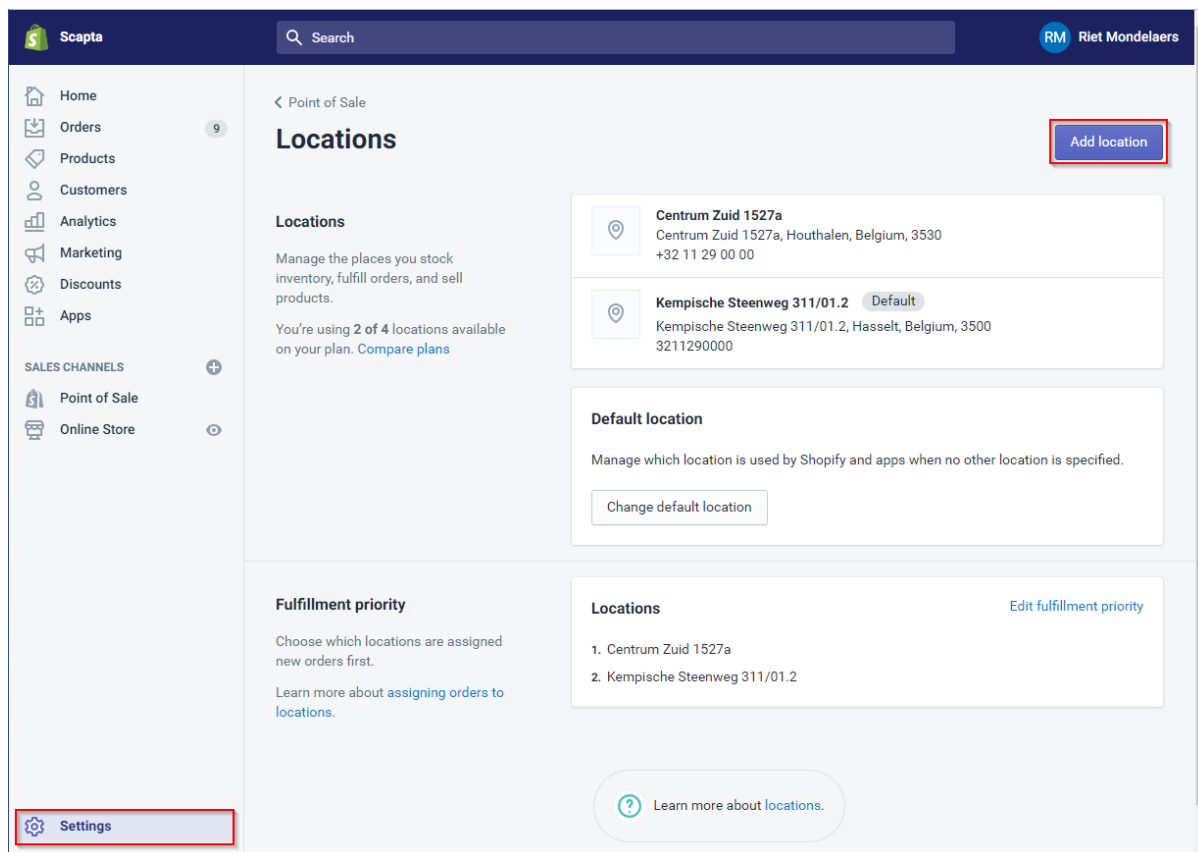
Id ↑	Item No.	Variant No.	Title	Option 1 Name	Option 1 Value	Option 2 Name	Opti
317320264418...	1925-W	-	Conference Bundle 1-6	Unit of Measure	PCS		

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

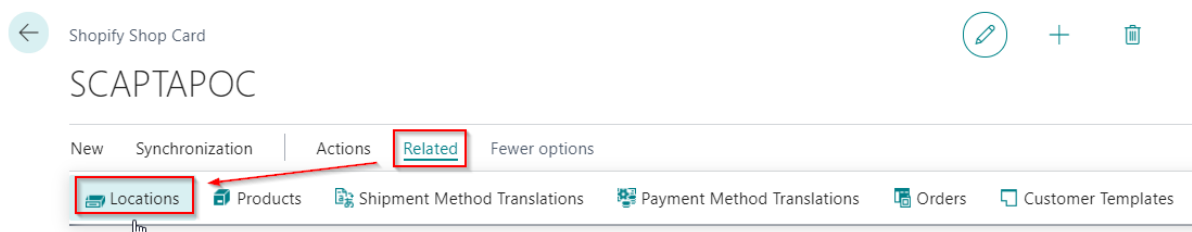
3.1.2 Setup locations

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

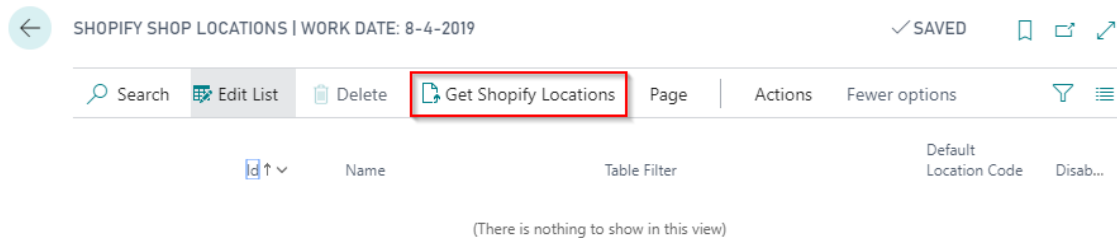


These locations need to be available in Microsoft Dynamics 365 Business Central.

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.

SHOPIFY SHOP LOCATIONS | WORK DATE: 8-4-2019

✓ SAVED

Search Edit List Delete Get Shopify Locations Page Actions Fewer options

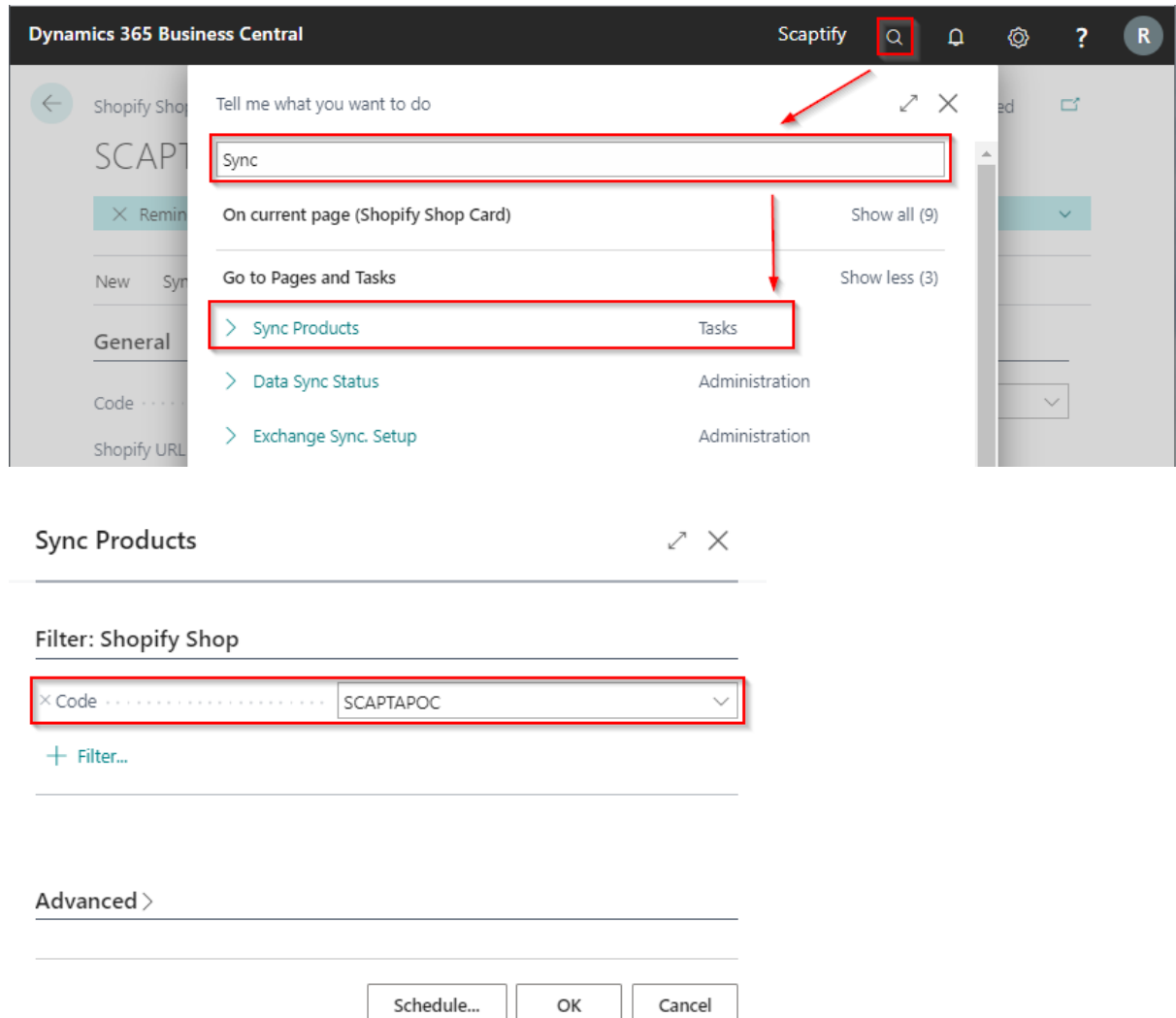
	Id ↑	Name	Table Filter	Default Location Code	Disab...
	6108167	Central			<input checked="" type="checkbox"/>
→	49682579	Kempische Steenweg 311/01.2	MAIN	MAIN	<input type="checkbox"/>

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

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 products":



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.

← 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** 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
 AMSTERDAM Lamp Unavailable on 2 channels and apps	22 in stock for 4 variants	Miscellaneous	Fabrikam, Inc.
 ANTWERP Conference Table Unavailable on 2 channels and apps	2 in stock for 1 variant	Assorted Tables	First Up Consultants
 ATHENS Desk Unavailable on 2 channels and apps	15 in stock for 2 variants	Assorted Tables	Graphic Design Institute
 ATHENS Mobile Pedestal 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
FURNITURE

Tags
Vintage, cotton, summer
Desk Athens

Variants
Reorder variants Edit options Add variant

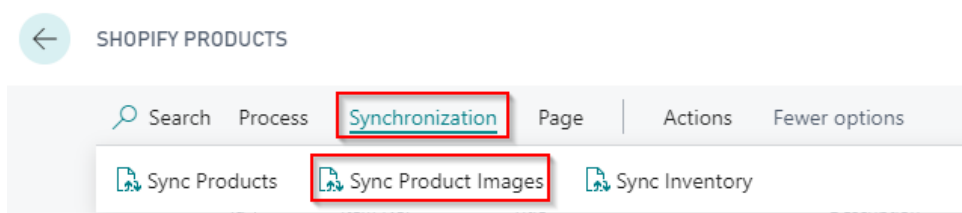
Select: All None BLACK WHITE PCS

	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 your 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

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

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

- **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

Search + New		Edit List	Delete	Page	More options
Code ↑	Description				
V_001	Blue / Big				
→ V_002	Red / Big				

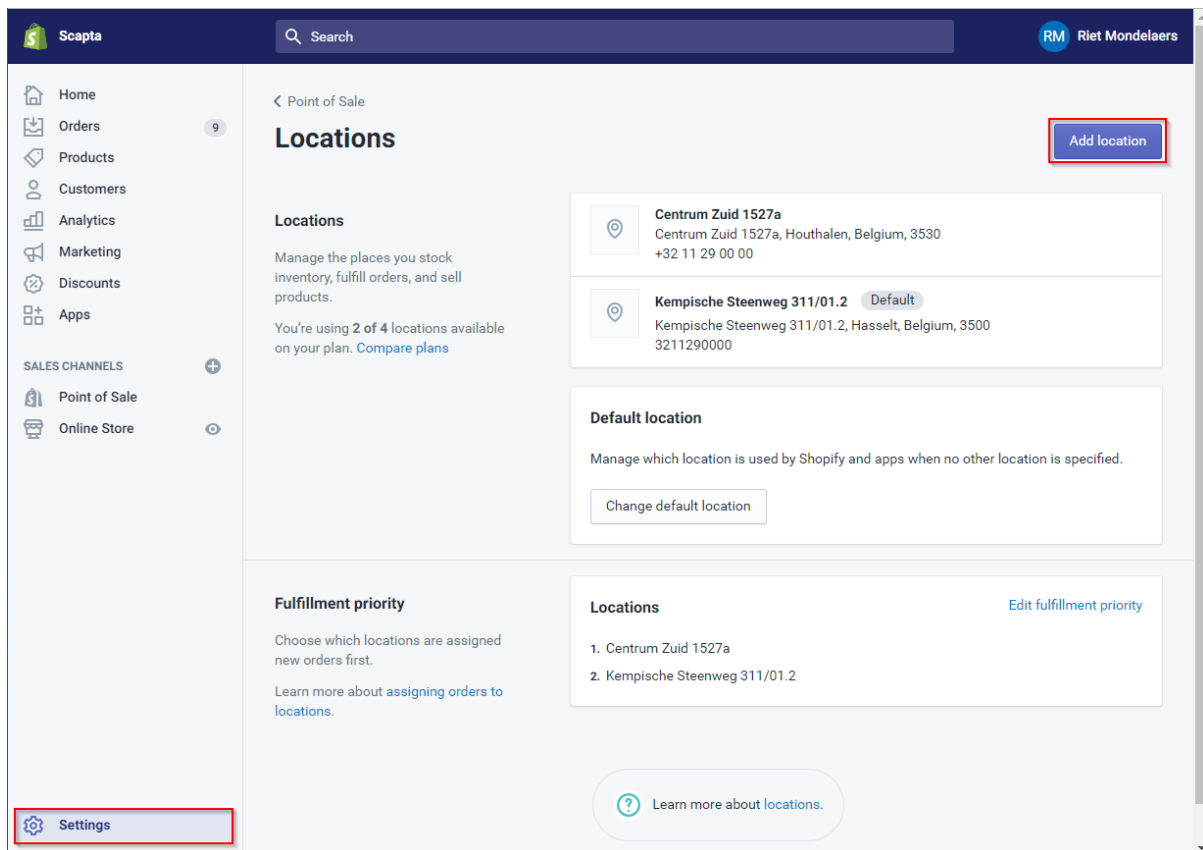
- **SKU Type**
Define if and how you want to create variants in Dynamics 365 Business Central. The option you select is what you have defined in the SKU field in Shopify.
 - Blanc
= You do not want to create variants.
 - Item no.
= The item number is defined in the SKU field in Shopify. The SKU's in Shopify are created as different items in Dynamics 365 Business Central.



- Variant code
 - = The variant is defined in the SKU field in Shopify. The SKU's are created as different variants based on the defined prefix for variants and an increasing number (see Variant prefix).
- Item No. + Variant Code
 - = The item number and variant code are defined in the SKU field in Shopify. In the field 'SKU Field separator' in Business central, you define the used field separator. The SKU's are created as an item with different variants.
For example: if you create the variant '1000/001' in Shopify, the item number in Microsoft Dynamics 365 Business Central will be 1000 and the variant '001'.
- Vendor Item No.
 - = The vendor item number is defined in the SKU field in Shopify. When you synchronize, the product will be linked to the item in Dynamics 365 Business Central with the same vendor item number.
- Barcode
 - = The barcode is defined in the SKU field in Shopify. When you synchronize, the product will be linked to the item in Dynamics 365 Business Central with the same barcode.
- SKU Field Separator
 - Define a field separator for the SKU if you use 'Item. No + Variant Code' to create a variant.
For example: if you create the variant '1000/001' in Shopify, the item number in Microsoft Dynamics 365 Business Central will be 1000 and the variant '001'.

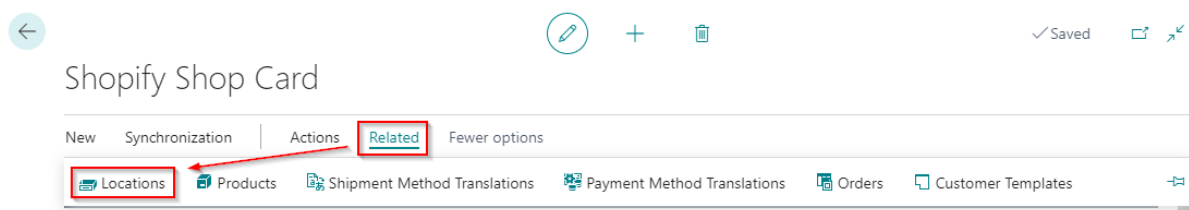
3.2.2 Setup locations

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

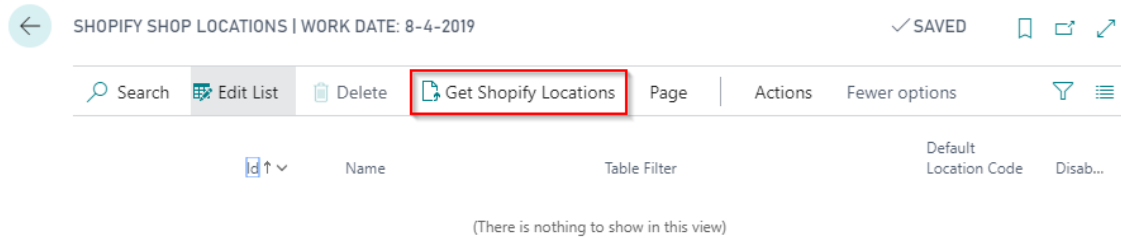


These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations

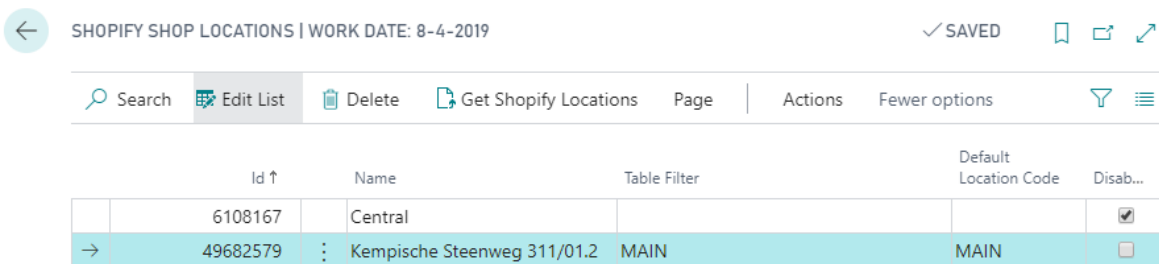


Use the function 'Get Shopify Locations' to get the locations from Shopify.



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

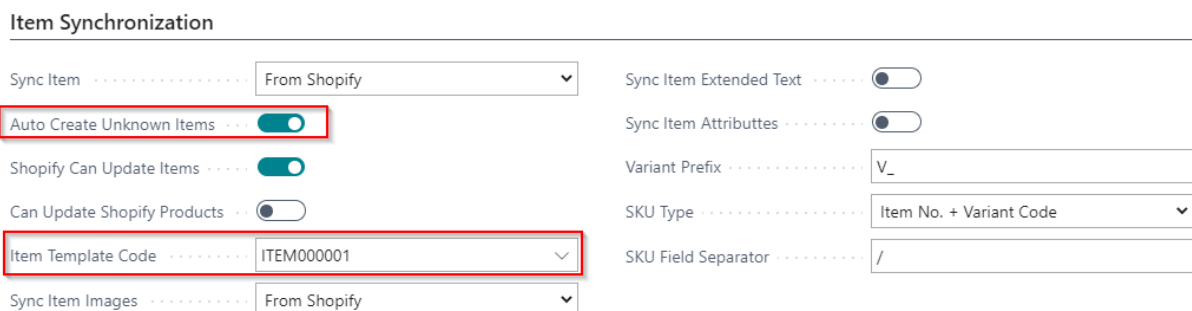
- Table filter: determines the location(s) for which the stock must be counted.
- Default location: determines the location to be used in the orders.



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

3.2.3 Setup to automatically create unknown items

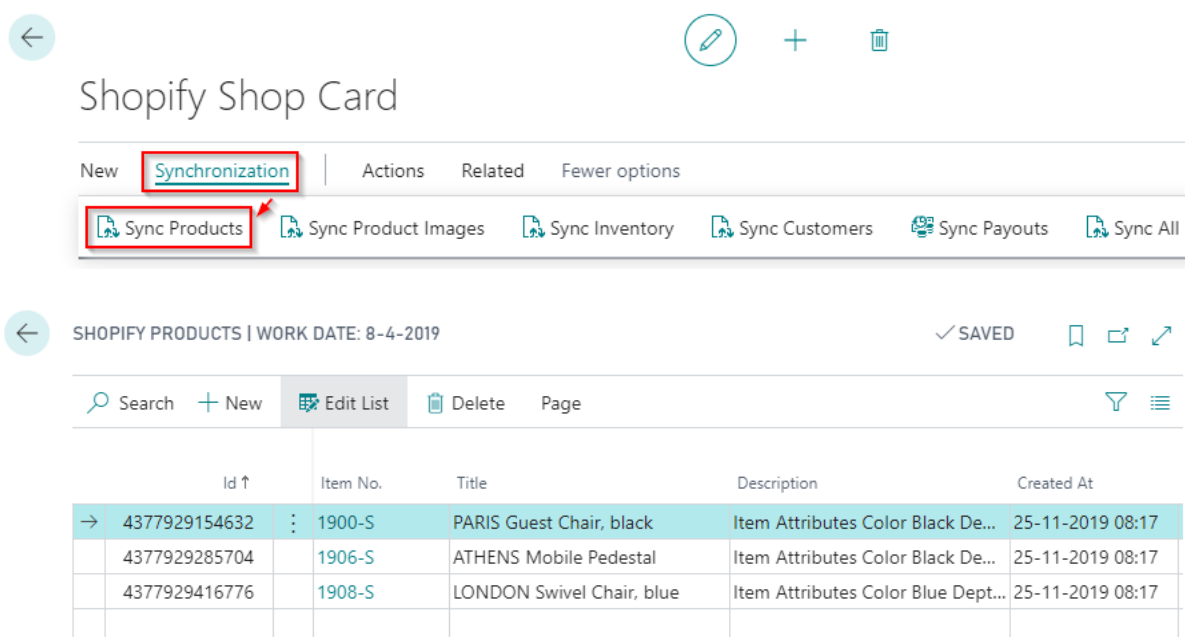
On the tab 'Item Synchronization' of the Shopify Shop Card, you can indicate to automatically create unknown items from Shopify into Dynamics 365 Business Central based on an item template.





3.2.4 Execute Item Synchronization

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

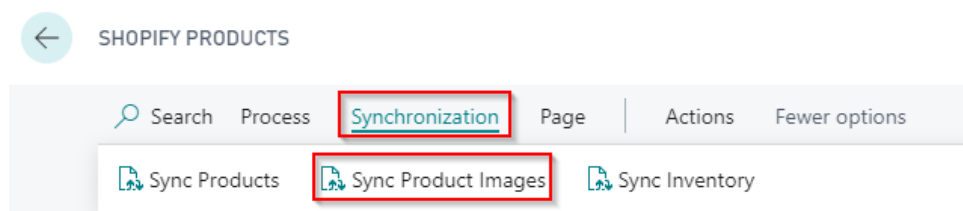


The screenshot shows the 'Shopify Shop Card' interface. At the top, there is a navigation bar with a back arrow, an edit icon, a plus icon, and a trash icon. Below this, the title 'Shopify Shop Card' is displayed. A menu bar contains 'New', 'Synchronization' (highlighted with a red box), 'Actions', 'Related', and 'Fewer options'. Under the 'Synchronization' menu, there is a sub-menu with 'Sync Products' (highlighted with a red box), 'Sync Product Images', 'Sync Inventory', 'Sync Customers', 'Sync Payouts', and 'Sync All'. Below the menu bar, there is a section titled 'SHOPIFY PRODUCTS | WORK DATE: 8-4-2019' with a '✓ SAVED' status and icons for bookmark, copy, and share. A toolbar contains 'Search', '+ New', 'Edit List', 'Delete', and 'Page'. Below the toolbar is a table with the following data:

	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 your Shopify Shop Card, you can execute the function 'Sync Product Images' to synchronize the items in Business Central.



The screenshot shows the 'SHOPIFY PRODUCTS' interface. At the top, there is a navigation bar with a back arrow. Below this, the title 'SHOPIFY PRODUCTS' is displayed. A menu bar contains 'Search', 'Process', 'Synchronization' (highlighted with a red box), 'Page', 'Actions', and 'Fewer options'. Under the 'Synchronization' menu, there is a sub-menu with 'Sync Products', 'Sync Product Images' (highlighted with a red box), and 'Sync Inventory'.



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 ☒

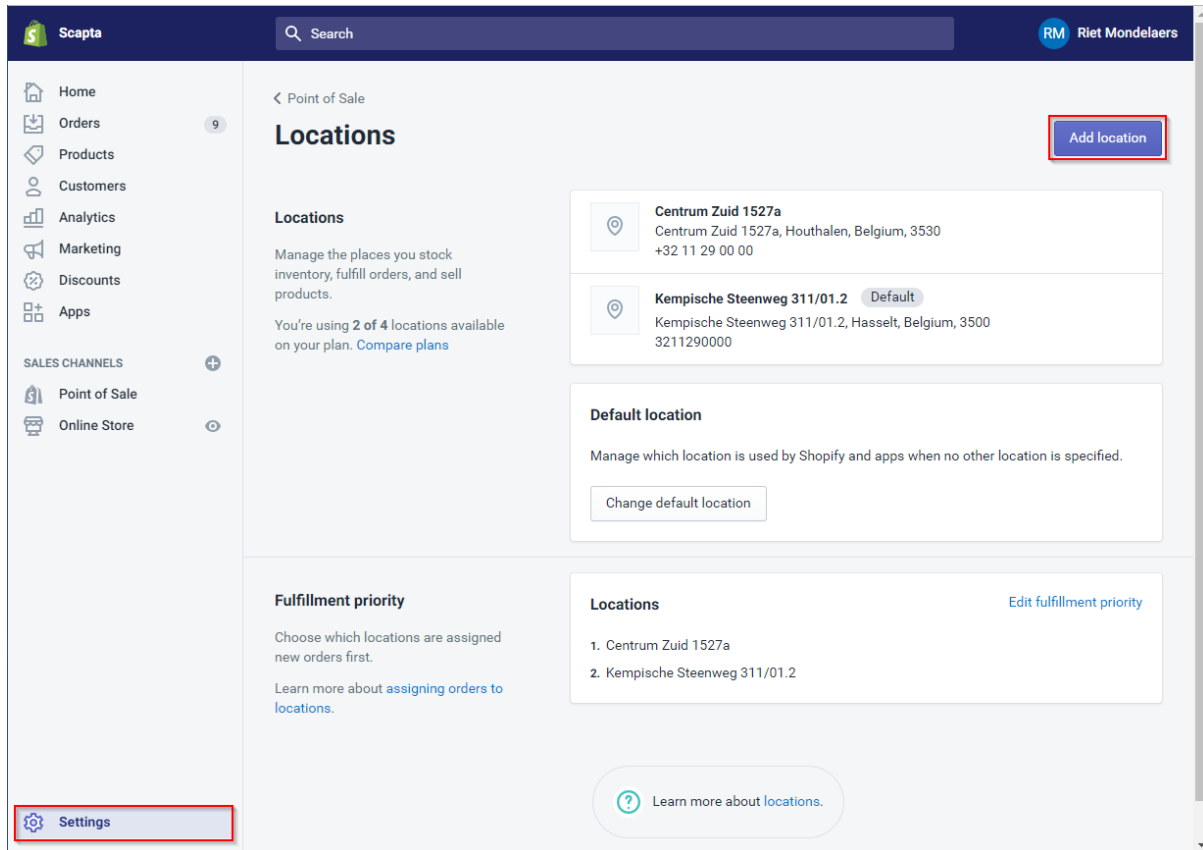
Default Inventory Policy

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.

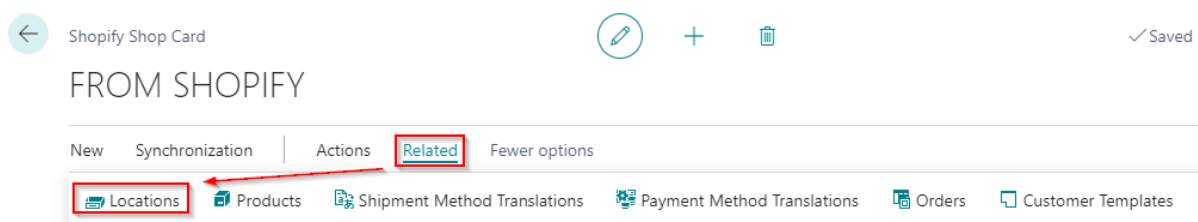
4.2 Setup locations

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

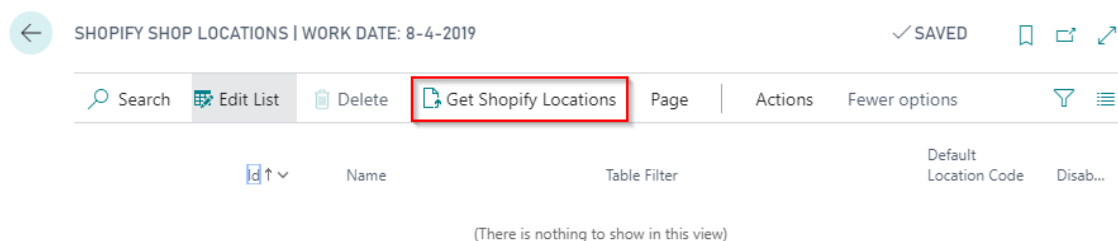


These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations

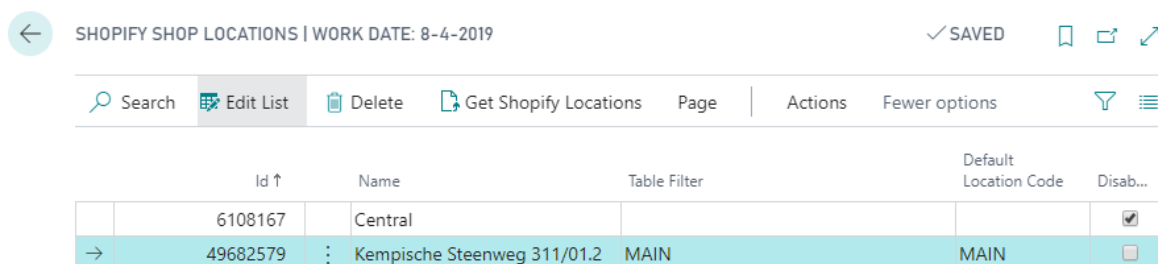


Use the function 'Get Shopify Locations' to get the locations from Shopify.



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.

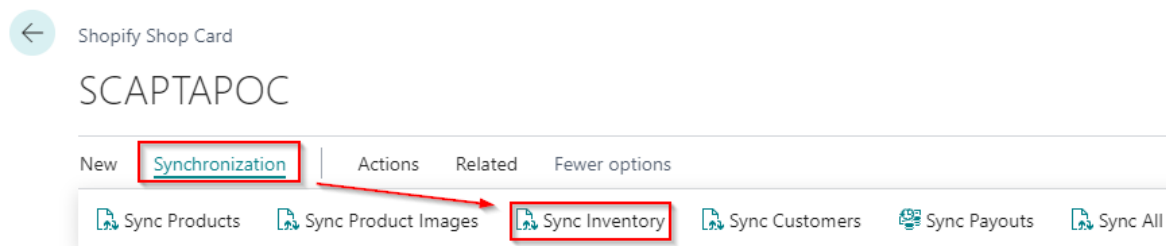


Uncheck 'Disable' if you want to sync the inventory for this location to Business Central.

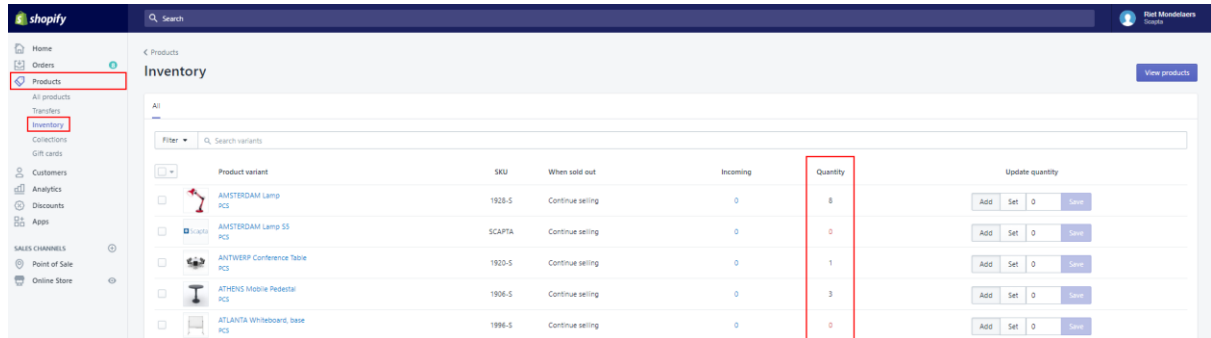
4.3 Execute stock synchronization

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.

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

🔍 Search Manage Process Synchronization Page Actions Fewer options 🔍 ☰ 🔗

Id ↑	Title	Description	Created At	Updated At	Product Type	Vendor
→ 4483598188616	Conference Bundle 1- 6		26-2-2020 09:31	26-2-2020 14:55		Scapta
4483598286920	Conference Bundle 1-8		26-2-2020 09:31	26-2-2020 10:37		Scapta
4483607265352	ANTWERP Conference Table	Item Attributes Color White De...	26-2-2020 09:55	26-2-2020 13:44		First Up Consulta
4483607330888	AMSTERDAM Lamp	Item Attributes Color Red Dept...	26-2-2020 09:55	26-2-2020 15:48		Fabrikam, Inc.
4483624534088	ROME Guest Chair, green		26-2-2020 10:38			First Up Consulta
4483778969672	SYDNEY Swivel Chair, green		26-2-2020 16:18	26-2-2020 16:18	Office Chair	Graphic Design I

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 ↑

(There is nothing to show in this view)

Shopify Inventory Factbox

Shopify Stock	Last Calculated Stock	Last Synced On
0	0	26-2-2020 15:48
0	0	26-2-2020 15:48

Shopify Variants						
Manage						
Id ↑	Item No.	Variant No.	Title	Option 1 Name	Option 1 Value	Option 2 Name
→ 31732026441800	1925-W	-	PCS	Unit of Measure	PCS	



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 checked="" 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 Shop Card

SCAPTAPOC

New Synchronization Actions **Related** Fewer options

Locations Products Shipment Method Translations Payment Method Translations Orders **Customer Templates**

Shopify Customer Templates

Search New Edit List Delete Page More options

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

Tax Areas Manage

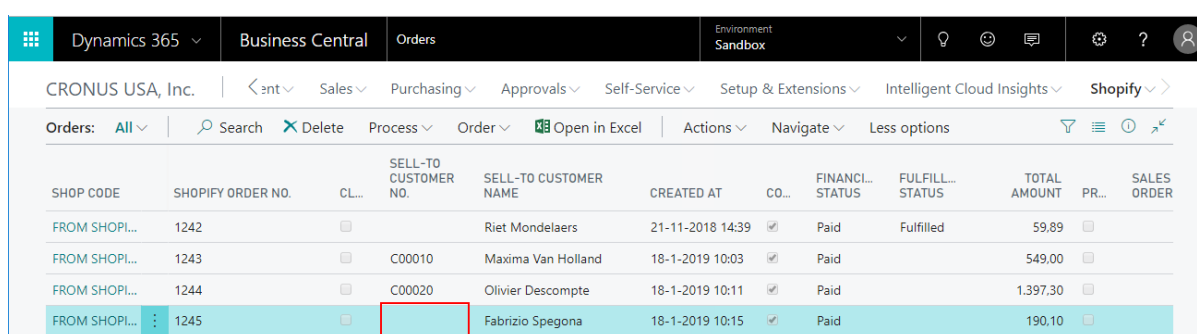
County ↑		Tax Area Code		VAT Bus. Posting Group
	Florida		ATLANTA, GA	
→	Illinois	:	CHICAGO, IL	

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>

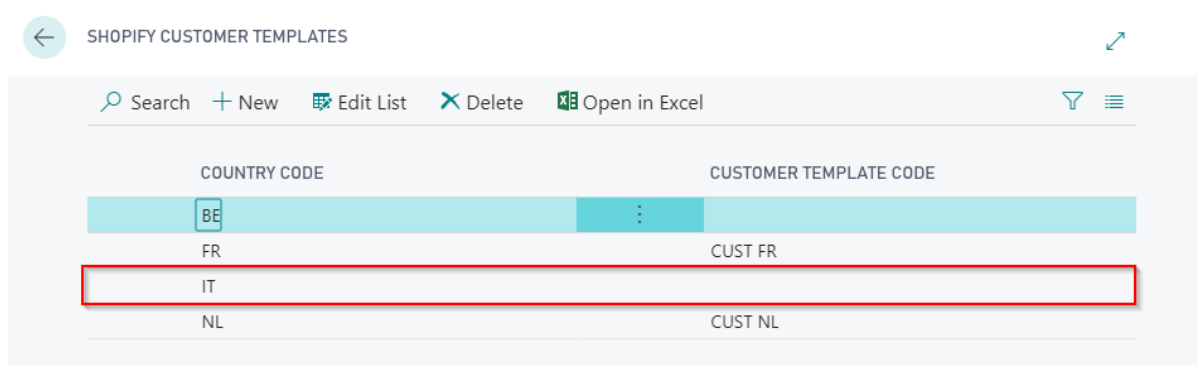
When you use multiple VAT/tax percentages, NAV should be leading. Furthermore, the item should already exist in NAV. A new item is created based on the defined item template and uses the VAT/tax percentage defined in this template, not the one set in the Shopify Shop.

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.



SHOP CODE	SHOPIFY ORDER NO.	CL...	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	CREATED AT	CO...	FINANCI... STATUS	FULFILL... STATUS	TOTAL AMOUNT	PR...	SALES ORDER
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		



COUNTRY CODE	CUSTOMER TEMPLATE CODE
BE	
FR	CUST FR
IT	
NL	CUST NL



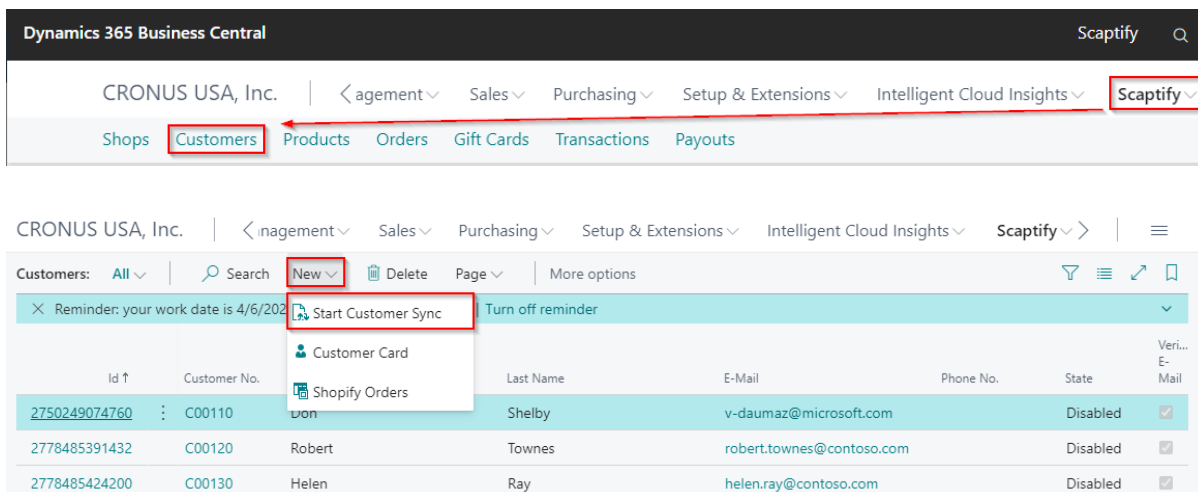
5.3 Synchronize customers

Remark: The customer created is the bill-to customer.

5.3.1 Manually sync customers

There are two ways to go to the customer sync.

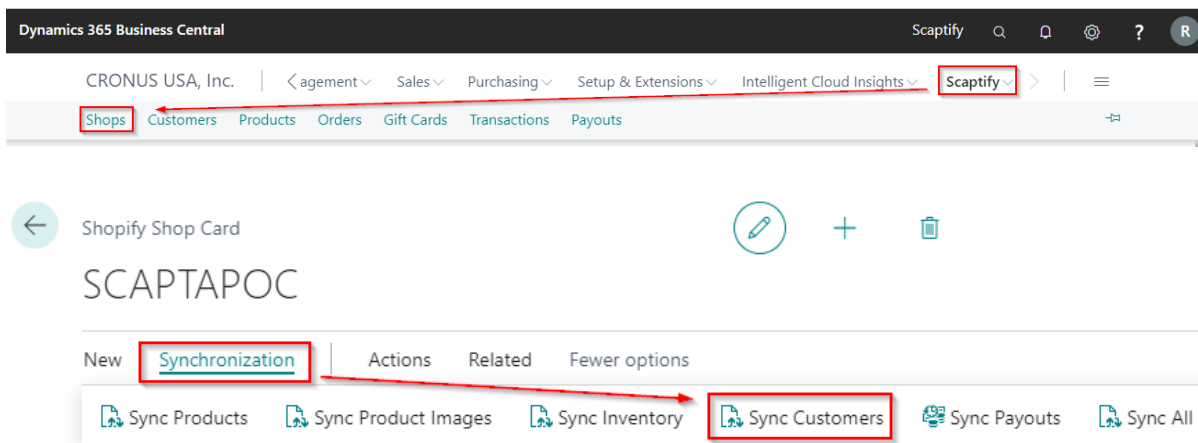
- Via 'Customers'



The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Scaptify' and a search icon. The main navigation bar shows 'CRONUS USA, Inc.' and various functional areas. The 'Customers' tab is highlighted. In the 'Customers' list view, the 'New' button is clicked, and the 'Start Customer Sync' option is selected from the dropdown menu.

Id ↑	Customer No.	Last Name	E-Mail	Phone No.	State	Veri... E-Mail
2750249074760	C00110	Shelby	v-daumaz@microsoft.com		Disabled	✓
2778485391432	C00120	Robert	robert.townes@contoso.com		Disabled	✓
2778485424200	C00130	Helen	helen.ray@contoso.com		Disabled	✓

- Via the Shopify Shop Card

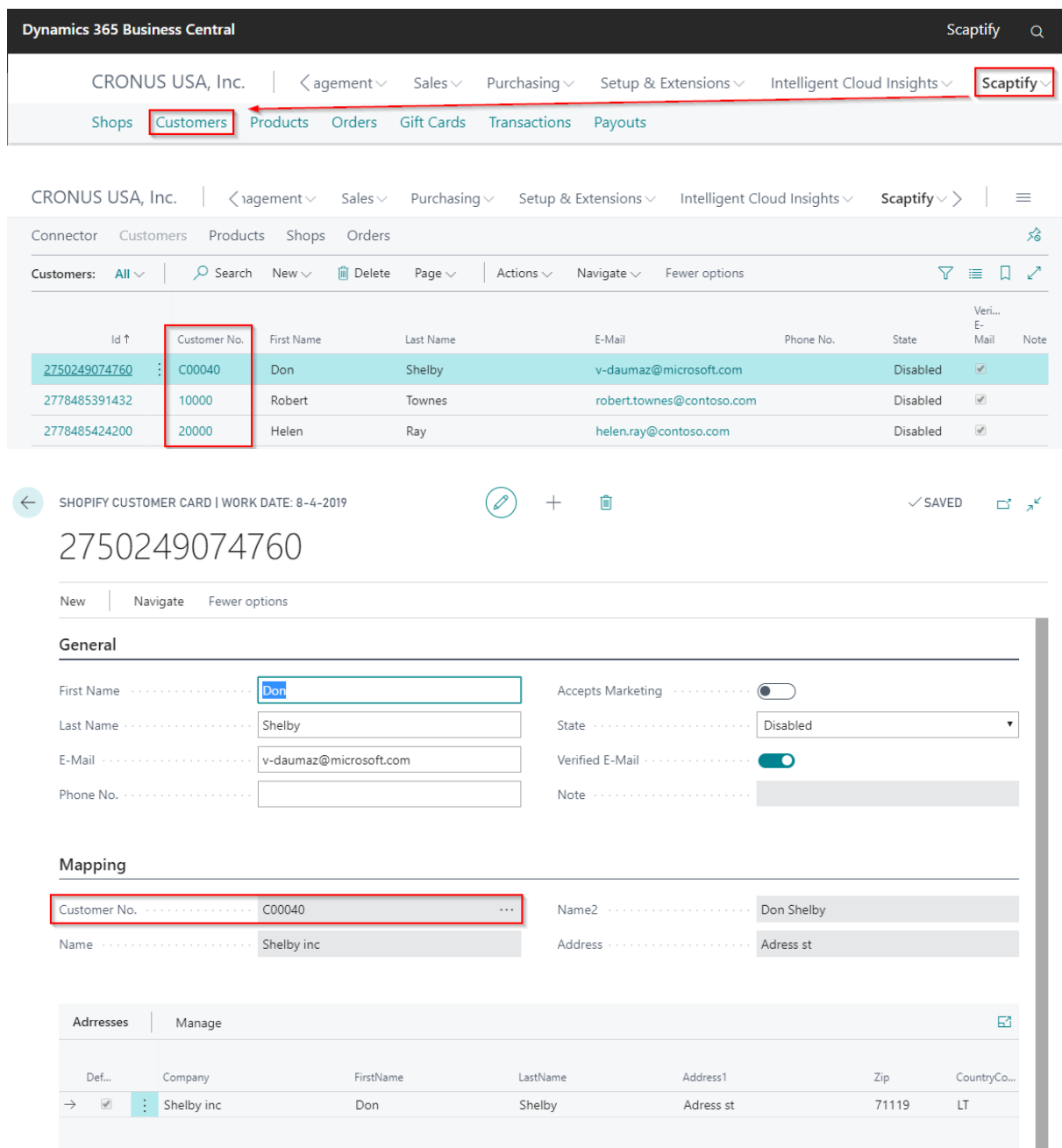


The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Scaptify' and a search icon. The main navigation bar shows 'CRONUS USA, Inc.' and various functional areas. The 'Shops' tab is highlighted. The 'Shopify Shop Card' is displayed, showing the 'SCAPTAPOC' shop. In the 'Synchronization' section, the 'Sync Customers' button is highlighted.

New	Synchronization	Actions	Related	Fewer options
Sync Products	Sync Product Images	Sync Inventory	Sync Customers	Sync Payouts
			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. At the top, the 'Scaptify' menu is highlighted. Below it, the 'Customers' tab is selected. A table lists three customers. The first customer, with ID 2750249074760 and Customer No. C00040, is highlighted. Below the table, the 'SHOPIFY CUSTOMER CARD' for this customer is shown. The 'General' section contains fields for First Name (Don), Last Name (Shelby), E-Mail (v-daumaz@microsoft.com), and Phone No. The 'Mapping' section shows the Customer No. (C00040) linked to the Name (Shelby inc). At the bottom, the 'Addresses' section shows a list of addresses, with the first address (Shelby inc) selected.

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

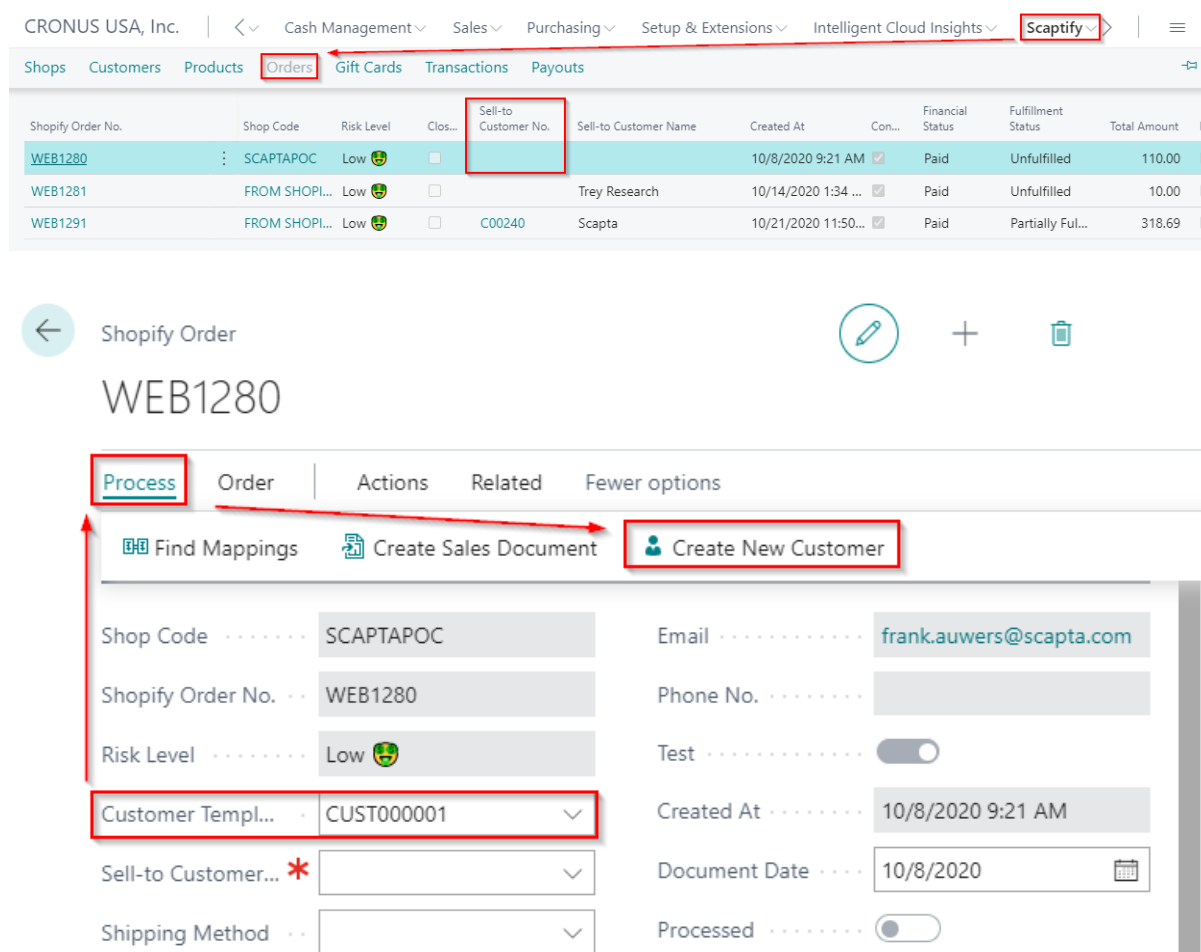
Addresses | Manage

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.



The screenshot shows the Scapta interface with the 'Orders' tab selected. A table lists Shopify orders, with the first row (WEB1280) highlighted. A red box highlights the 'Sell-to Customer No.' column. Below the table, the 'Shopify Order' details for WEB1280 are shown. The 'Process' tab is selected, and a red box highlights the 'Create New Customer' button. Below this, the 'Customer Templ...' dropdown is highlighted, showing the selected value 'CUST000001'.

Shopify Order No.	Shop Code	Risk Level	Clos...	Sell-to Customer No.	Sell-to Customer Name	Created At	Con...	Financial Status	Fulfillment Status	Total Amount
WEB1280	SCAPTAPOC	Low	<input type="checkbox"/>			10/8/2020 9:21 AM	<input checked="" type="checkbox"/>	Paid	Unfulfilled	110.00
WEB1281	FROM SHOPI...	Low	<input type="checkbox"/>		Trey Research	10/14/2020 1:34 ...	<input checked="" type="checkbox"/>	Paid	Unfulfilled	10.00
WEB1291	FROM SHOPI...	Low	<input type="checkbox"/>	C00240	Scapta	10/21/2020 11:50...	<input checked="" type="checkbox"/>	Paid	Partially Ful...	318.69

Shopify Order: WEB1280

Process | Order | Actions | Related | Fewer options

Find Mappings | Create Sales Document | **Create New Customer**

Shop Code: SCAPTAPOC | Email: frank.auwers@scapta.com

Shopify Order No.: WEB1280 | Phone No.:

Risk Level: Low | Test: ☐

Customer Templ...: CUST000001 | Created At: 10/8/2020 9:21 AM

Sell-to Customer...*: | Document Date: 10/8/2020

Shipping Method: | Processed: ☐

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

Accepts Marketing

Last Name

Mondelaers

State

Disabled

E-Mail

rietmondelers@gmail.com

Verified E-Mail

Phone No.

Note

Mapping

Customer No.

Name2

Name

Address

Addresses

Manage

Def...

Company

FirstName

LastName

Address1

Zip

CountryCo...

→

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	<input type="text" value="40100"/>	Shopify Order No. on Doc. L...	<input checked="" type="checkbox"/>
Sold Gift Card Account	<input type="text" value="40100"/>	Auto Create Orders	<input type="checkbox"/>
Tip Account	<input type="text" value="40100"/>	Tax Area Source	<input type="text" value="No Taxes"/>

- Shipping Cost Account
Define the g/l account that should be used for shipping costs.
- Sold Gift Card Account
Define the g/l account that should be used for the sale of gift cards.
- Tip account
Define the g/l account that should be used for obtained tips.
- 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		-		

- Auto Create Orders
Determine whether order in Microsoft Dynamics 365 Business Central may be created automatically.
- 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

6.1.1 Shipment method translations

When you have synchronized orders, the Shopify delivery methods are retrieved in Business Central. Go to your Shopify Shop and open the 'Shipment Method Translations'.

Name is the delivery method in Shopify. In 'Code', you set the corresponding shipping method in Microsoft Dynamics 365 Business Central.

← Shopify Shop Card ⌕ + 🗑️

SCAPTAPOC

New Synchronization Actions **Related** Fewer options

📍 Locations 📦 Products 📦 **Shipment Method Translations** 💳 Payment Method Translations 📄 Orders 📄 Customer Templates

← Shopify Shipment Methods ✓ Saved 📄 🔗

🔍 Search + New 📋 Edit List 🗑️ Delete Page 🔍 ☰

	Name ↑		Code
	DHL		DHL
	Local Delivery		DELIVERY
→	Standard Shipping_	⋮	

6.1.2 Shipping agents

When you navigate to the list of Shipping agents in Microsoft Dynamics 365 Business Central, the column 'Shopify Tracking Company' is added. Select the tracking company in Shopify where you can track your items.

← Shipping Agents ✓ Saved 📄 🔗

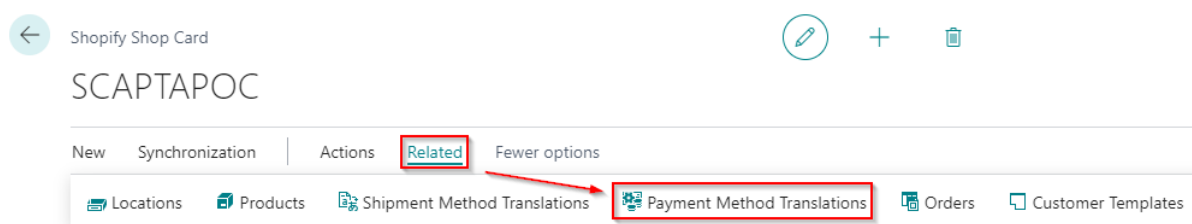
🔍 Search + New 📋 Edit List 🗑️ Delete Page More options 🔍 ☰

	Code ↑		Name	Internet Address	Shopify Tracking Company
	DHL		DHL Systems, Inc.	www.dhl.com/track/track.post-track?awb=...	DHL Express
	FEDEX		Federal Express Corporation	www.fedex.com/cgi-bin/track_it?trk_num=...	FedEx
	OWN LOG.		Own Logistics		
→	UPS	⋮	United Parcel Service of America, Inc.	wwwapps.ups.com/tracking/tracking.cgi?trac	UPS



6.1.3 Payment method translations

When you have synchronized orders, the Shopify payment methods are retrieved in Business Central. Go to your Shopify Shop and open the 'Shipment payment Translations'.



You can define Payment Method translations for your Shopify Shop. The fields 'Gateway' and 'Credit Card Company' retrieved from Shopify. In 'Payment method' you define the corresponding method in Microsoft Dynamics 365 Business Central.

If a customer pays part via visa card and part via maestro, you can assign priorities. The payment method with the highest priority will be entered in the order. If both payment methods have the same priority, the payment method of the highest amount will be used.

Shopify Payment Methods ✓ Saved ✎ ↗

Search + New ⌵ Edit List 🗑 Delete Page 🔍 ☰

	Gateway ↓		Credit Card Company	Payment Method	Priority
→	manual	⋮		CASH	2
	bogus		Bogus	CARD	1
					0

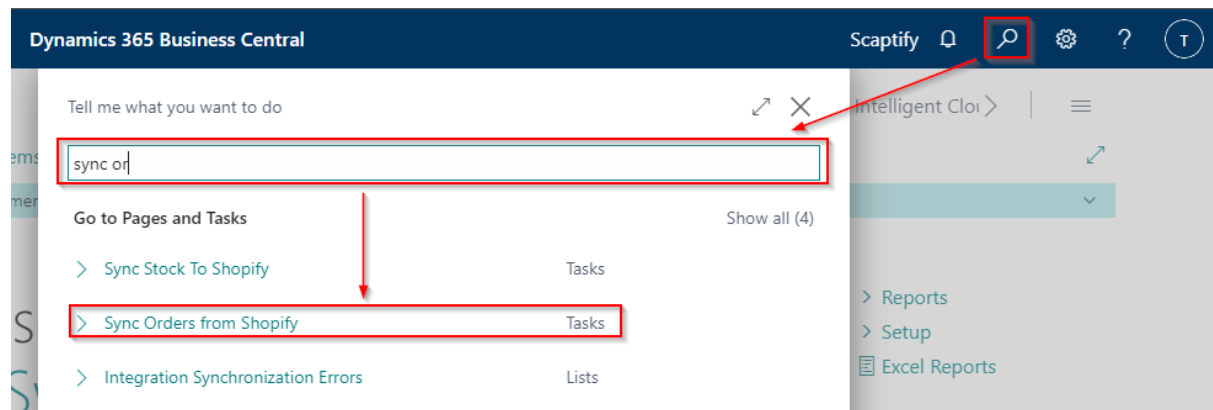


6.2 Execute Order Synchronization

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:





Sync Orders from Shopify

Filter: Shopify Shop

× Code

SCAPTAPOC

▼

+ Filter...

Filter: Shopify Orders To Import

× Fully Paid

Yes

▼

× Risk Level

Low

▼

× Financial Status

▼

× Fulfillment Status

▼

× Confirmed

▼

× Action

▼

× Attribute Key Exists

▼

+ Filter...

Filter totals by:

× Attribute Key Filter

Schedule...

OK

Cancel

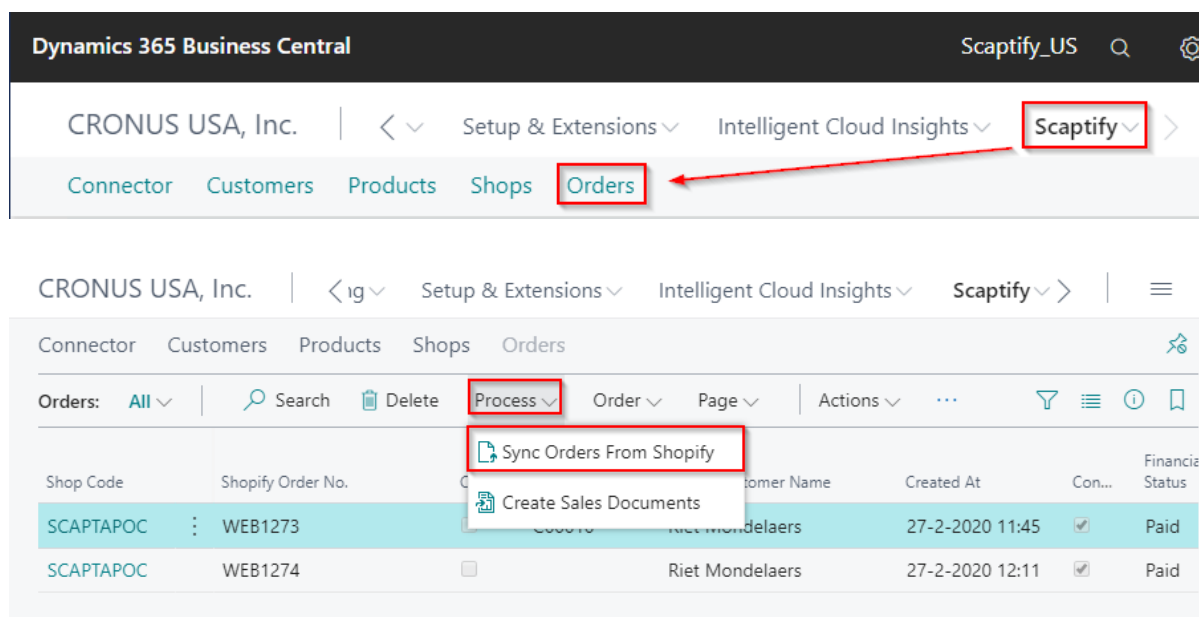
It is possible to apply filters to synchronize only a limited number of orders, e.g. only those who have been paid in full or whose risk level is low.

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.



The screenshot shows the Dynamics 365 Business Central interface. At the top, the navigation bar includes 'CRONUS USA, Inc.', 'Setup & Extensions', 'Intelligent Cloud Insights', and 'Scaptify'. Below this, the 'Orders' tab is selected. In the 'Orders' view, the 'Process' button is highlighted, and a dropdown menu is open showing the 'Sync Orders From Shopify' action. The table below lists orders with columns: Shop Code, Shopify Order No., Customer Name, Created At, and Financial Status.

Shop Code	Shopify Order No.	Customer Name	Created At	Financial Status
SCAPTAPOC	WEB1273	Riet Mondelaers	27-2-2020 11:45	Paid
SCAPTAPOC	WEB1274	Riet Mondelaers	27-2-2020 12:11	Paid

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:



The screenshot shows a search interface with the text 'job queue' entered. Below the search bar, the results are listed under the heading 'Go to Pages and Tasks'. The first result is 'Job Queue Entries' with a 'Lists' link next to it. Below this are two more results: 'Job Queue Categories' and 'Job Queue Log Entries', both with 'Lists' links.



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	Description	Sync Orders from Shopify
70007602	Earliest Start Date/Time	
Sync Orders from Shopify	Status	On Hold

Report Parameters

Report Request Page Opti... ☒

Report Output Type None (Processing only)

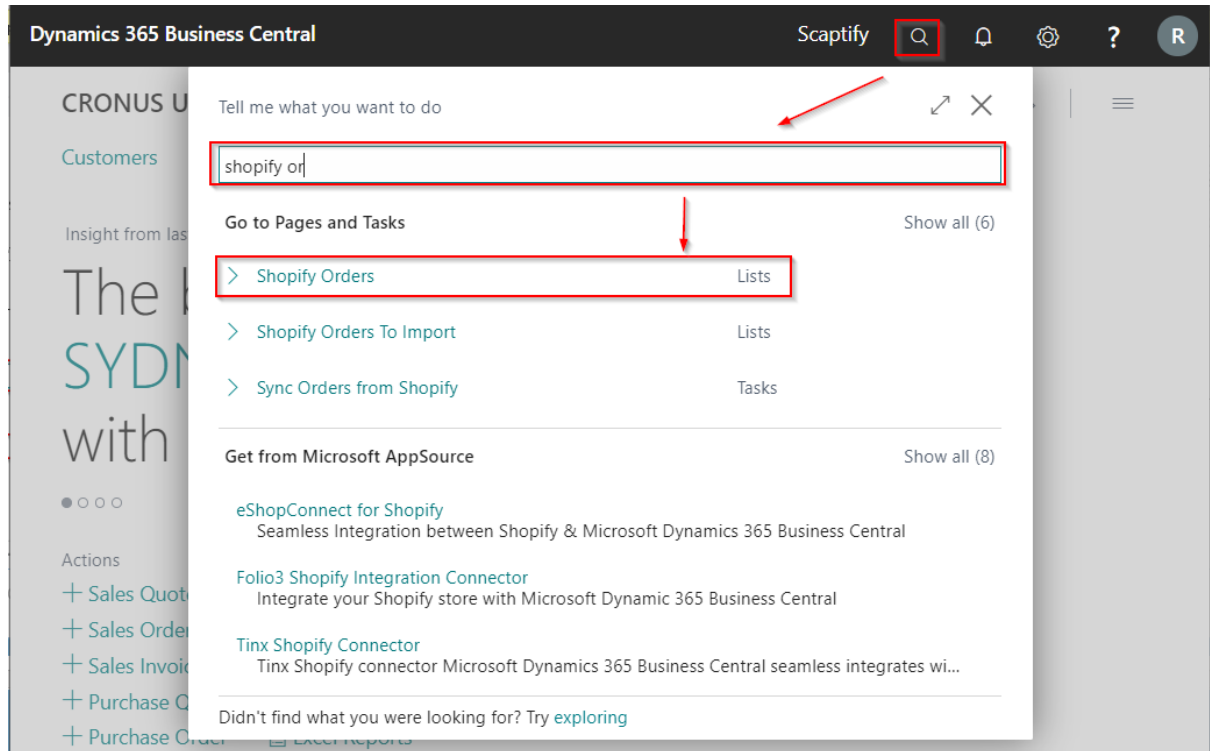
Printer Name

Recurrence

Recurring Job	Run on Saturdays
Run on Mondays	Run on Sundays
Run on Tuesdays	Starting Time
Run on Wednesdays	Ending Time
Run on Thursdays	No. of Minutes between ...
Run on Fridays	Inactivity Timeout Period

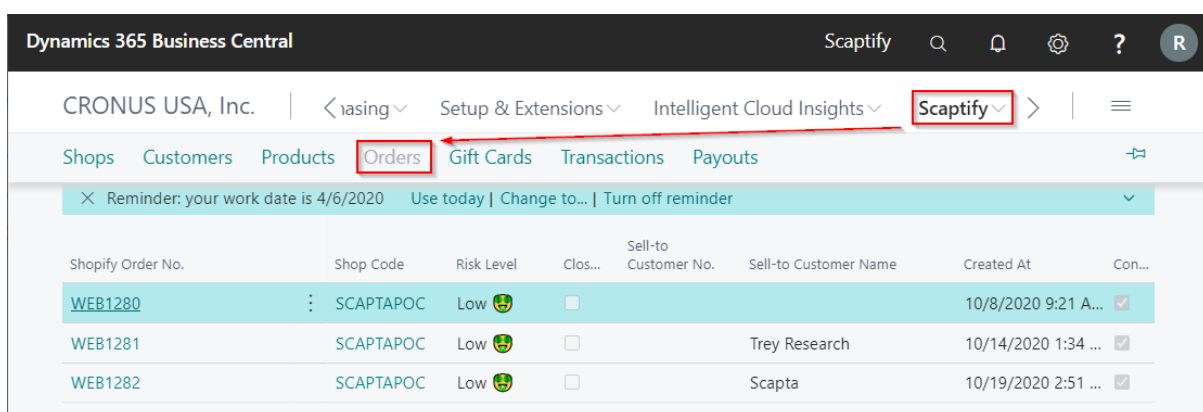
6.3 View Shopify Orders

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



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

SCAPTAPOC

New Synchronization Actions **Related** Fewer options

Locations Products Shipment Method Translations Payment Method Translations **Orders** Customer Templates

Shopify Orders

Shopify Order No.	Shop Code	Risk Level	Clos...	Sell-to Customer No.	Sell-to Customer Name	Created At
WEB1280	SCAPTAPOC	Low				10/8/2020 9
WEB1281	SCAPTAPOC	Low			Trey Research	10/14/2020
WEB1282	SCAPTAPOC	Low			Scapta	10/19/2020

6.4 Process Shopify Orders

Navigate to the Shopify Orders.

Dynamics 365 Business Central

Scaptaify

CRONUS USA, Inc. | Sales Purchasing Setup & Extensions Intelligent Cloud Insights **Scaptaify**

Shops Customers Products **Orders** Gift Cards Transactions Payouts

Edit the Shopify order.



SHOPIFY ORDER | WORK DATE: 8-4-2019



✓ SAVED



WEB1273 · Riet Mondelaers

Process Order Actions Navigate Fewer options

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	<div></div>
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, risk level ...

You can navigate easily to the Sales order, sales invoice and to the order in Shopify (Shopify Status Page).

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 ✎ + 🗑 📄 ↗

WEB1282 · Scapta

Process **Order** More options ?

⚠ Risks 📄 Transactions 📄 Shipping Costs 📄 Fulfillments 📄 Sales Order 📄 Sales Invoice 🌐 Shopify Status Page 📌

Shop Code	SCAPTAPOC	Email	riet.mondelaers@scapta.com
Shopify Order No.	WEB1282	Phone No.	
Risk Level	Low 🟢	Test	<input type="checkbox"/>
Customer Template Code		Created At	10/19/2020 2:51 PM
Sell-to Customer No.		Document Date	10/19/2020
Shipping Method		Processed	<input type="checkbox"/>
Payment Method		Financial Status	Paid
Closed	<input type="checkbox"/>	Fulfillment Status	Unfulfilled
Sell-to		Sales Order No.	
Name	Scapta	Sales Invoice No.	
Address	Kempische Steenweg	Error	<input type="checkbox"/>
Address 2		Error Message	
Post Code	3500	Work Description	
City	Hasselt		

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 ✎ + 🗑 📄 ↗


WEB1282 · Scapta

Process Order More options ?

🔍 Find Mappings 📄 **Create Sales Document** 👤 Create New Customer 📌

Shop Code	SCAPTAPOC	Email	riet.mondelaers@scapta.com
Shopify Order No.	WEB1282	Phone No.	
Risk Level	Low 🟢	Test	<input type="checkbox"/>





Create sales document from Shopify order WEB1282?

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

Shopify Order ✎ + 🗑 ✓ Saved 🔗 🔍

WEB1282 · Scapta

Process **Order** | More options

⚠ Risks
📄 Transactions
📦 Shipping Costs
📦 Fulfillments
📄 Sales Order
📄 Sales Invoice
🌐 Shopify Status Page

Shop Code	SCAPTAPOC	Email	riet.mondelaers@scapta.com
Shopify Order No.	WEB1282	Phone No.	
Risk Level	Low 🟢	Test	<input type="checkbox"/>
Customer Template Code	<input type="text"/>	Created At	10/19/2020 2:51 PM
Sell-to Customer No.	C00180	Document Date	10/19/2020 📅
Shipping Method	<input type="text"/>	Processed	<input type="checkbox"/>
Payment Method	<input type="text"/>	Financial Status	Paid
Closed	<input type="checkbox"/>	Fulfillment Status	Unfulfilled
Sell-to		Sales Order No.	S-ORD101007
Name	Scapta	Sales Invoice No.	
Address	Kempische Steenweg	Error	<input type="checkbox"/>
Address 2		Error Message	
Post Code	3500	Work Description	
City	Hasselt		

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.

Remark: If no sales order can be created for the Shopify Order, an error message is displayed.



Sales Order ✎ + 🗑 ✓ Saved 🔗 ↶

S-ORD101007 · Scapta

Process	Report	Release	Posting	Prepare	Order	Request Approval	Print/Send	Navigate	Actions	Related	...
Contact	Mathijs Schols	.....	.....	.....	.....	Requested Delivery Date	.....	.....	.....	.....
Posting Date	4/6/2020	.....	.....	.....	.....	External Document No.	.....	.....	.....	.....
Order Date	4/6/2020	.....	.....	.....	.....	Status	.....	Released	.....	.....

Scaptify

Shopify Order No. WEB1282 Risk Level Low 🟢

Lines	Manage	Line	Order	Page	Fewer options	
Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Incl. Tax Tax Area
Comment		Shopify Order No.: WEB1282				
→ G/L Account	40100	Tip	MAIN	1		2.61
Item	1928-S	AMSTERDAM Lamp T	MAIN	1	PCS	54.90
G/L Account	40100	Local Delivery	MAIN	1		

Remark: If no sales order can be created for the Shopify Order, an error message is displayed.



Shopify Order ✎ + 🗑 🔗 ↗

WEB1282 · Scapta

Process	Order	More options
Shopify Order No.	WEB1282	Phone No.
Risk Level	Low 🟢	Test
Customer Template Code		Created At
Sell-to Customer No.	10000	Document Date
Shipping Method		Processed
Payment Method		Financial Status
Closed	<input type="checkbox"/>	Fulfillment Status
Sell-to		Sales Order No.
Name	Scapta	Sales Invoice No.
Address	Kempische Steenweg	Error
Address 2		Error Message
Post Code	3500	Work Description
City	Hasselt	

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	Description	Shopify Create Sales Orders
70007605	Earliest Start Date/Time	
Shopify Create Sales Orders	Status	On Hold

Report Parameters

Report Request Page Opti... ☒

Printer Name

Report Output Type **None (Processing only)**

Recurrence

Recurring Job <input type="checkbox"/>	Run on Saturdays <input type="checkbox"/>
Run on Mondays <input checked="" type="checkbox"/>	Run on Sundays <input type="checkbox"/>
Run on Tuesdays <input checked="" type="checkbox"/>	Starting Time
Run on Wednesdays <input checked="" type="checkbox"/>	Ending Time
Run on Thursdays <input checked="" type="checkbox"/>	No. of Minutes between ... 0
Run on Fridays <input checked="" type="checkbox"/>	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.



 Beantwoorden  Allen 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



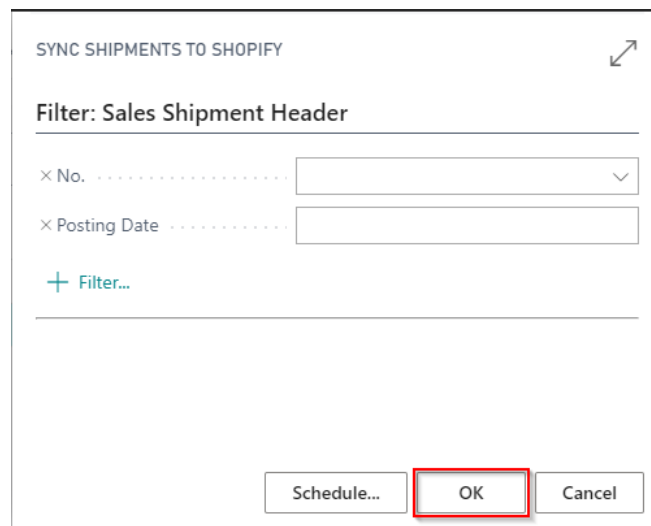
AMSTERDAM Lamp × 1
BLUE / PCS

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

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

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 ...

Inactivity Timeout Period



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

Sync Orders from Shopify

Filter: Shopify Shop

× Code

SCAPTAPOC

▼

+ Filter...

Filter: Shopify Orders To Import

× Fully Paid

▼

× Risk Level

▼

× Financial Status

▼

× Fulfillment Status

▼

× Confirmed

▼

× Action

▼

× Attribute Key Exists

▼

Schedule...

OK

Cancel



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

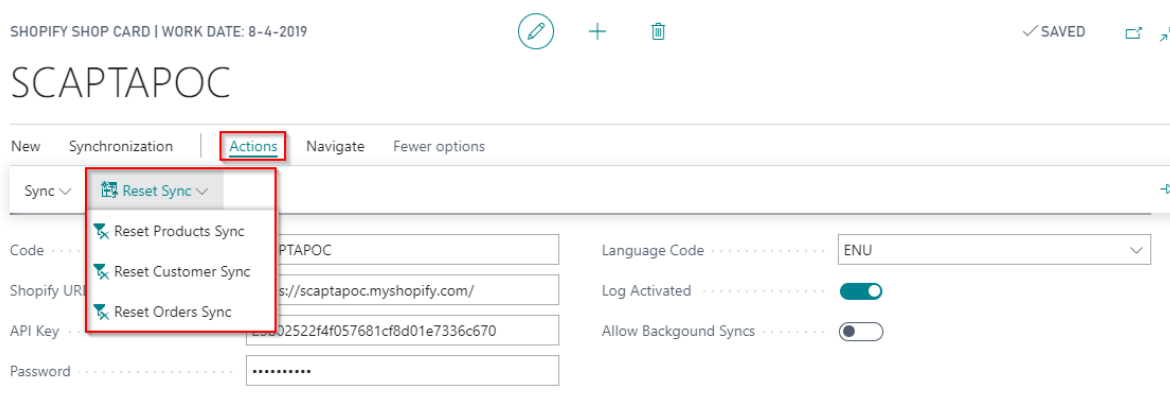
Shop Code	Shopify Order No.	Clos...	Sell-to Customer No.	Sell-to Customer Name	Created At	Con...	Financial Status	Fulfillment Status	Total Amount
SCAPTAPOC	WEB1272	<input checked="" type="checkbox"/>	C00010	Riet Mondelaers	26-2-2020 11:39	<input checked="" type="checkbox"/>	Paid	Fulfilled	59,89
SCAPTAPOC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



7. Reset sync

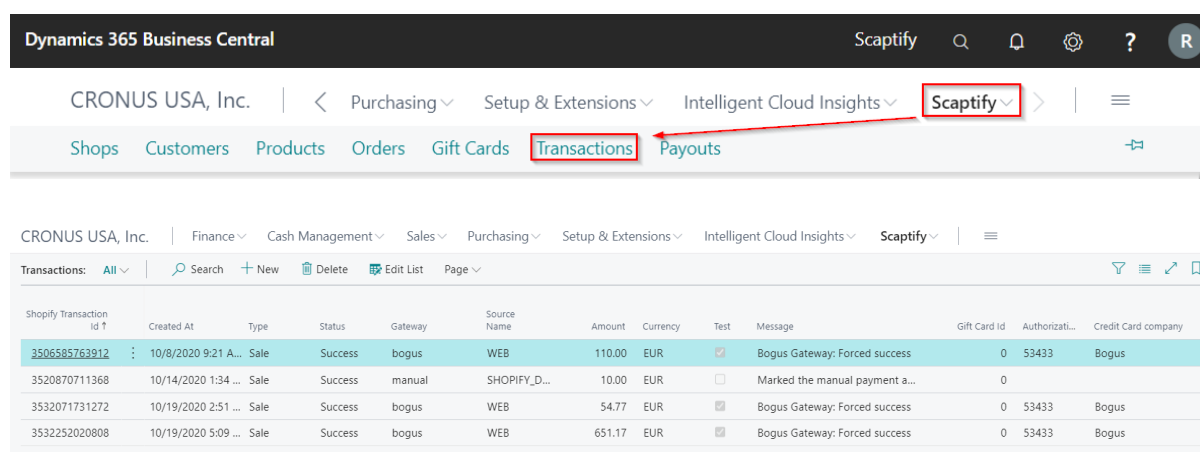
On the Shopify Shop card, there are functions available to reset the sync. This function ensures that when the sync is executed, all data is synced and not just the changes that have happened compared to the previous sync.

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



8. Transactions

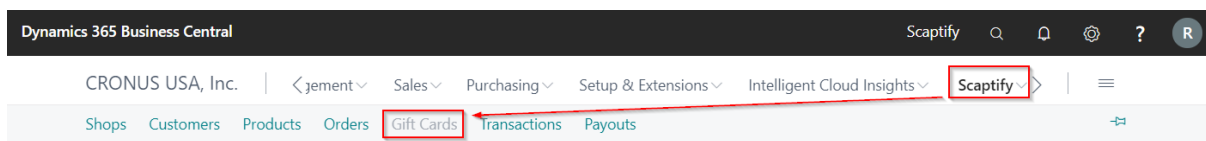
The transactions that took place in Shopify can be viewed in Business Central via 'Transactions'. They are synchronized together with the orders.



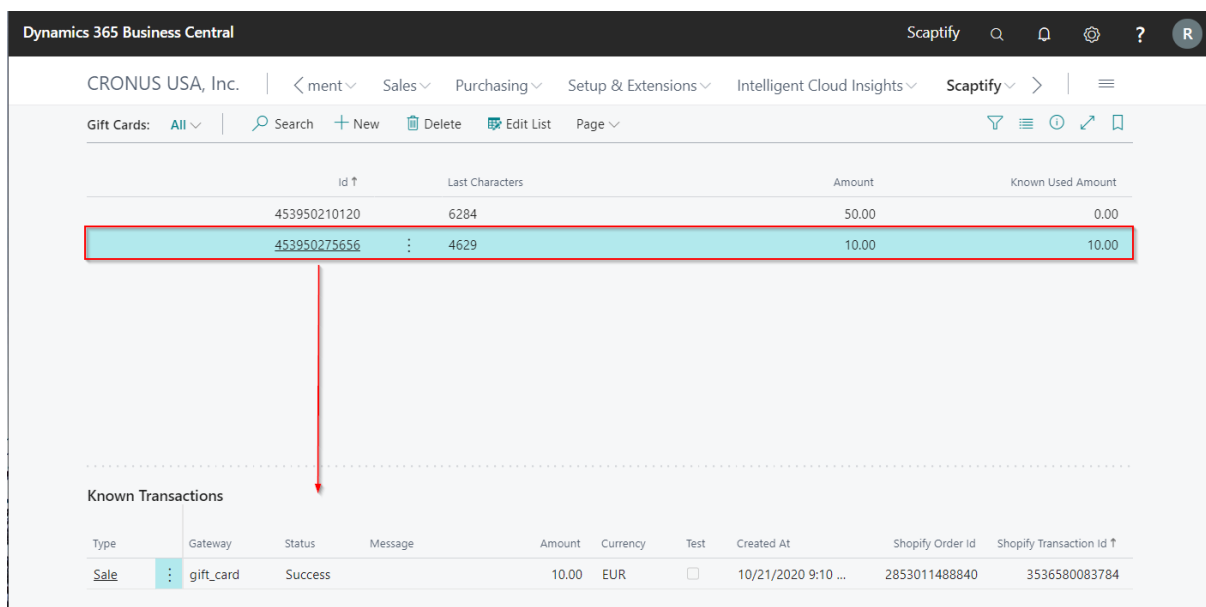


9. Gift Cards

In the Shopify Shop, you can buy gift cards. When you synchronize orders, gift cards are also synchronized to 'Gift Cards'.



You get an overview of the sold gift cards and the used amount of the gift card with the relevant transactions.



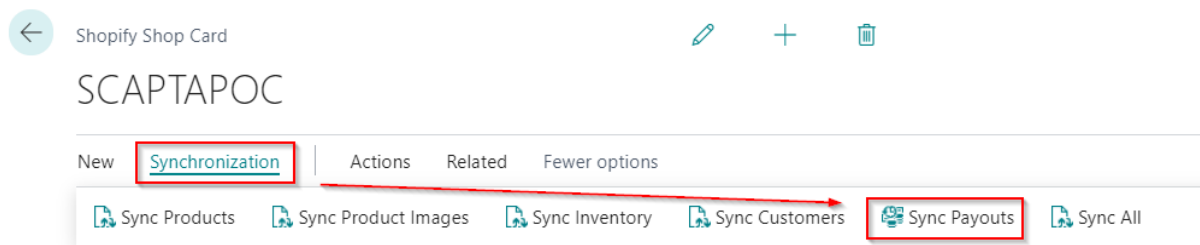


10. Payouts

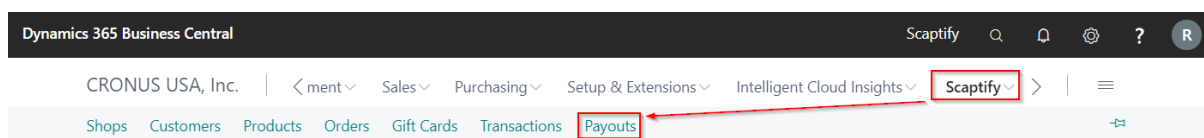
If your store has Shopify Payments enabled, then you receive payments through Shopify Payouts when a customer pays using Shopify Payments and specific accelerated checkouts.

The payouts can also be synchronized to Microsoft Dynamics 365 Business Central.

Go to your Shopify Shop and execute 'Sync Payouts'.



You get an overview of the payouts if you navigate to 'Scaptify' and then to 'Payouts'. You get a view of the details of the payouts.





Dynamics 365 Business Central

Scaptify

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

Payouts: All | Search | Page

Date	Amount	Currency	Status	Adjustments Fee Amount	Adjustments Gross Amount	Charges Fee Amount	Charges Gross Amount	Refunds Fee Amount	Refunds Gross Amount	Reserved Funds Fee Amount	Reserved Funds Gross Amount
10/22/2020	2,318.17	EUR	In Transit	0.00	0.20	46.83	2,373.75	0.00	-8.95	0.00	0.00
10/12/2020	197.16	EUR	Paid	0.00	0.00	3.69	200.85	0.00	0.00	0.00	0.00
10/9/2020	63.48	EUR	Paid	0.00	0.00	1.42	64.90	0.00	0.00	0.00	0.00
10/7/2020	410.99	EUR	Paid	0.00	0.00	4.41	415.40	0.00	0.00	0.00	0.00
10/5/2020	11.61	EUR	Paid	0.00	0.00	0.29	11.90	0.00	0.00	0.00	0.00
10/2/2020	311.33	EUR	Paid	0.00	0.00	0.87	312.20	0.00	0.00	0.00	0.00
10/1/2020	60.54	EUR	Paid	0.00	0.00	1.36	61.90	0.00	0.00	0.00	0.00

Payment Transactions

Processed At	Type	Test	Amount	Fee	Net Amount	Currency	Source Id	Source Type	Source Order Id	Invoice No.	Source Order Transaction Id
10/7/2020 4:17 PM	Charge	<input type="checkbox"/>	170.90	2.90	168.00	EUR	874567073958	Charge	2815062180006	—	3443144196262
10/7/2020 9:45 PM	Charge	<input type="checkbox"/>	29.95	0.79	29.16	EUR	874843832486	Charge	2816350617766	—	3444493484198
10/9/2020 3:18 A...	Payout	<input type="checkbox"/>	-197.16	0.00	-197.16	EUR	58964770982	Payout	—	—	—



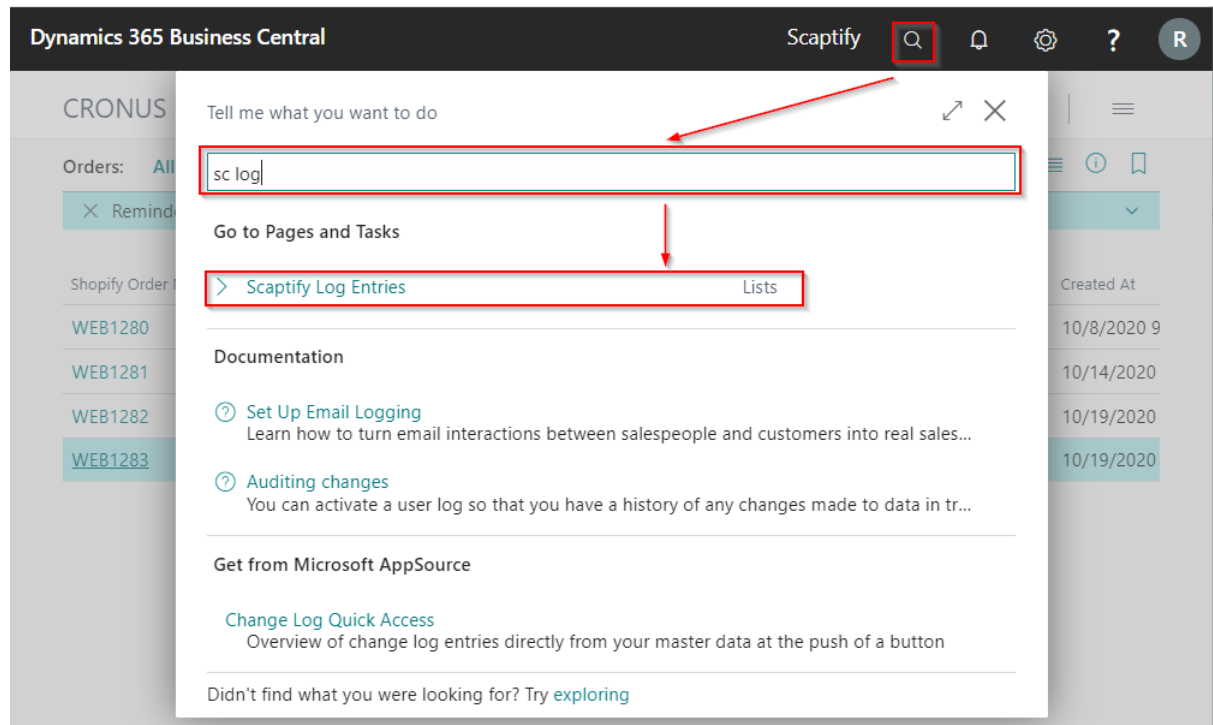
11. Troubleshooting

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"/>
Shopify Access Key	shpat_551ed639a8ad351c7846f56e	Allow Background Syncs ..	<input checked="" type="checkbox"/>

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. In the top right corner, the 'Scaptify' app is highlighted with a red box. A search bar is open, and the text 'sc log' is entered. Below the search bar, the results are displayed under the heading 'Go to Pages and Tasks'. The first result is 'Scaptify Log Entries', which is highlighted with a red box. To the right of this result is a link labeled 'Lists'. Below the search results, there is a section for 'Documentation' with two items: 'Set Up Email Logging' and 'Auditing changes'. At the bottom, there is a section for 'Get from Microsoft AppSource' with a link for 'Change Log Quick Access'.



← Scaptify Log Entries

Search Manage Log Entries Page More options

Entry No. ↓	Date and Time	Time	User ID	URL	Method	Status Code	Status Description
162	10/19/2020 3:42 ...	3:42:09 PM	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK
161	10/19/2020 3:42 ...	3:42:08 PM	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK
160	10/19/2020 3:42 ...	3:42:07 PM	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK
159	10/19/2020 3:42 ...	3:42:07 PM	RIET.MONDE...	https://scaptapoc.myshopify.co...	GET	200	OK
158	10/19/2020 3:42 ...	3:42:07 PM	RIET.MONDE...	https://scaptapoc.myshopify.co...	GET	200	OK
157	10/19/2020 3:42 ...	3:42:06 PM	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK
156	10/19/2020 2:20 ...	2:20:54 PM	FRANK.AUWE...	https://scaptapoc.myshopify.co...	GET	200	OK
155	10/19/2020 2:17 ...	2:17:45 PM	FRANK.AUWE...	https://scaptapoc.myshopify.co...	GET	200	OK

← Scaptify Log Entry

162

Algemeen

Entry No.	162	URL	https://scaptapoc.myshopify.com/admin/a...
Date and Time	10/19/2020 3:42 PM	Method	POST
Time	3:42:09 PM	Status Code	200
User ID	RIET.MONDELAERS	Status Description	OK

Request

```
{
  "query": "{customer(id: \"gid://shopify/Customer/2828044369992\")}"
}
```

Response

```
{
  "data": {
    "customer": null
  },
  "extensions": {
    "cost": {
      "requestedQueryCost": 15,
      "actualQueryCost": 1,
      "throttleStatus": {
        "maximumAvailable": 1000,
        "currentlyAvailable": 999,
        "restoreRate": 50
      }
    }
  }
}
```

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



Scaptify Log Entries



Search Manage Log Entries Page More options								Filter Menu	
Delete Entries...er Than 7 Days Delete All Entries								Reset	
162	:	10/19/2020 3:42 ...	3:42:09 PM	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK	
161	:	10/19/2020 3:42 ...	3:42:08 PM	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK	
160	:	10/19/2020 3:42 ...	3:42:07 PM	RIET.MONDE...	https://scaptapoc.myshopify.co...	POST	200	OK	
159	:	10/19/2020 3:42 ...	3:42:07 PM	RIET.MONDE...	https://scaptapoc.myshopify.co...	GET	200	OK	