



## 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 'Shop for Apps'.




- Search for 'Scaptify'



shopify app store Categories Collections Search Shopify.com Log out

ORDERS AND SHIPPING | CUSTOMER SUPPORT

 **Scaptify** by [Scapta AppFactory NV](#)

Connect your Shop with Microsoft Dynamics 365 Business Central

★ 5.0 (3 reviews)

**Add app**

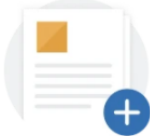
Free plan available. Additional charges may apply.

Scapta Search Riet Mondelaers

Home Orders Products Customers Analytics Marketing Discounts Apps SALES CHANNELS Point of Sale Online Store Settings

Scaptify by Scapta AppFactory NV

### Good afternoon



**Scaptify**

How long can you work for 49 cent? 1 minute?  
How long does it take to enter an order? (\*)  
Discover what Scaptify can do for you...

(\*) keeping in mind mistakes are avoided, customer created, syncing articles is done

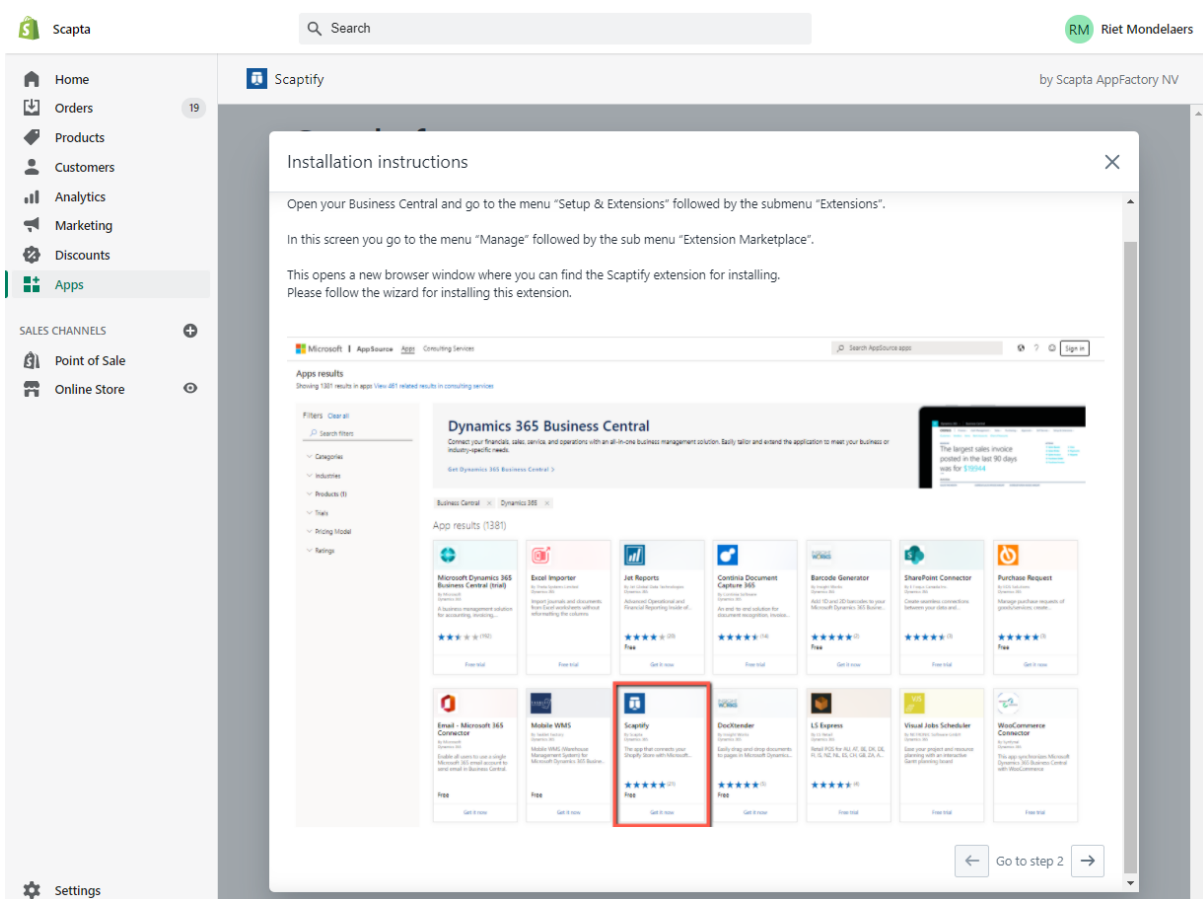
**Installation instructions**

**Current progress**

You are currently at 0 / 30 of your included orders.

**Update plan**

Choose 'Installation instructions' to see how you need to install Scaptify in Microsoft Dynamics 365 Business Central.



Choose 'Update plan' to select the plan you need for your business. You have Monthly plans and special Monthly plans. In the Monthly plans, you can filter on the orders per month to see which plan fits for you.



Scapta Search RM Riet Mondelaers

Scaptify by Scapta AppFactory NV

Dashboard

### Manage your plan

All Scaptify plans sync your Business Central products and customers to this Shopify store. If you want to send your store orders to Business Central, please select one of the plans below.

#### Monthly Plans

Plan	Price	Orders Included	Additional Order Cost
XS	\$49	100 orders	\$0.33 per additional order
S	\$99	300 orders	\$0.20 per additional order
M	\$199	1000 orders	\$0.10 per additional order
L	\$399	3000 orders	\$0.05 per additional order

Orders per month Between 100 and 300

- Between 100 and 300
- Between 250 and 700
- Between 700 and 1500
- Between 1500 and 3000
- Between 3000 and 10000
- Between 10000 and 50000

#### Special Monthly Plans

If you are just starting with your business you can select Freemium or Pay & Go. If you only want to sync Products and Customers, select Essentials. The Sandbox plan can be used towards Sandbox Environments in Microsoft Dynamics 365 Business Central for demo and testing purposes only. The Sandbox plan is not allowed to be used in a production environment.

Plan	Price	Features	Additional Order Cost
Freemium	\$0	30 orders included	\$0.99 per additional order
Pay&Go	\$0	Pay as you go	\$0.5 per additional order
Essentials	\$50	Products and customers sync	Orders are not synced
Sandbox	\$0	30 orders included	\$0.99 per additional order

I have a code

Settings



- 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.

The screenshot displays the Scapta application interface. On the left is a navigation menu with options like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. The main content area shows the Scaptify app page, which includes a search bar at the top, a 'Scaptify' header with a plus icon, a description of the app, and an 'Installation instructions' button. Below this is a 'Current progress' section with a progress bar and an 'Update plan' button. At the bottom, there is a red-bordered box containing 'Application credentials' with fields for 'Access key' (shpat\_551ed639a8ad351c7846f56e8eeac634) and 'Shop url' (https://scaptapoc.myshopify.com), each with a 'Copy' button.

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

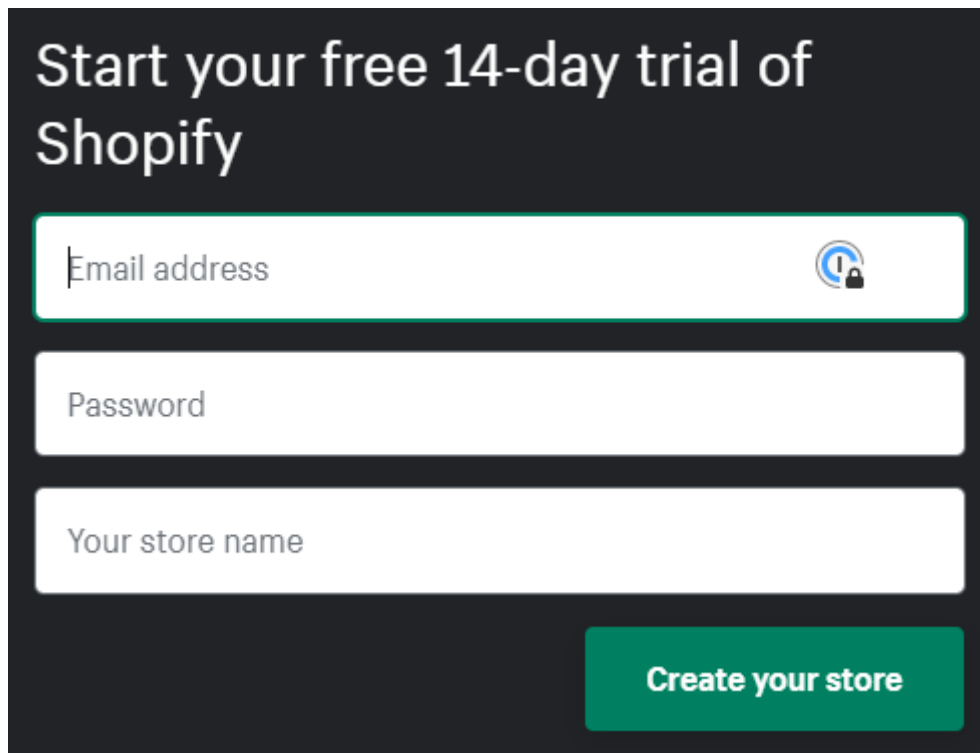


## 2.2 Shopify POS

### 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/>.



The screenshot shows a dark-themed sign-up form for a free 14-day trial of Shopify. The form contains three input fields: 'Email address' with a lock icon, 'Password', and 'Your store name'. A green 'Create your store' button is located at the bottom right of the form.

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

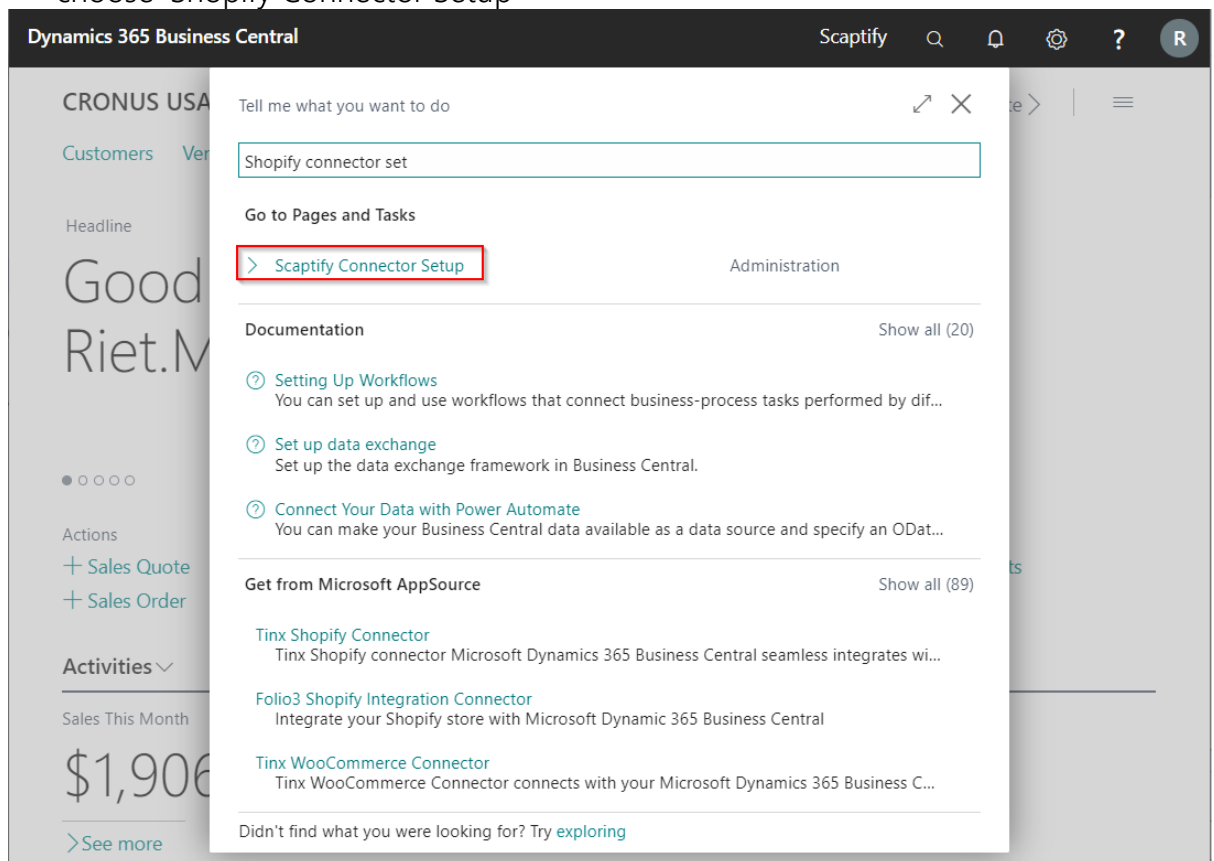


## 2.3 Microsoft Dynamics 365 Business Central

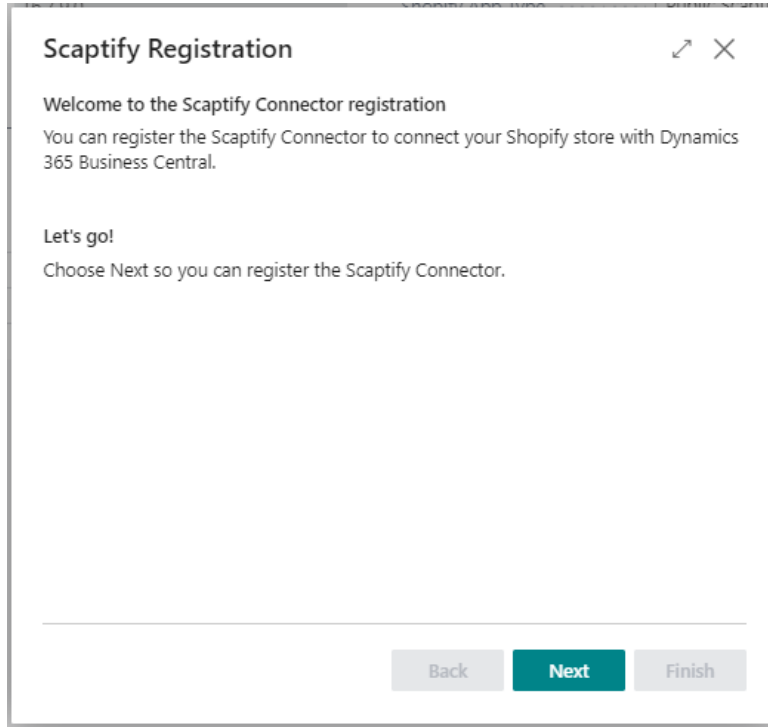
### 2.3.1 Shopify Connector Setup

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** ↗ ✕

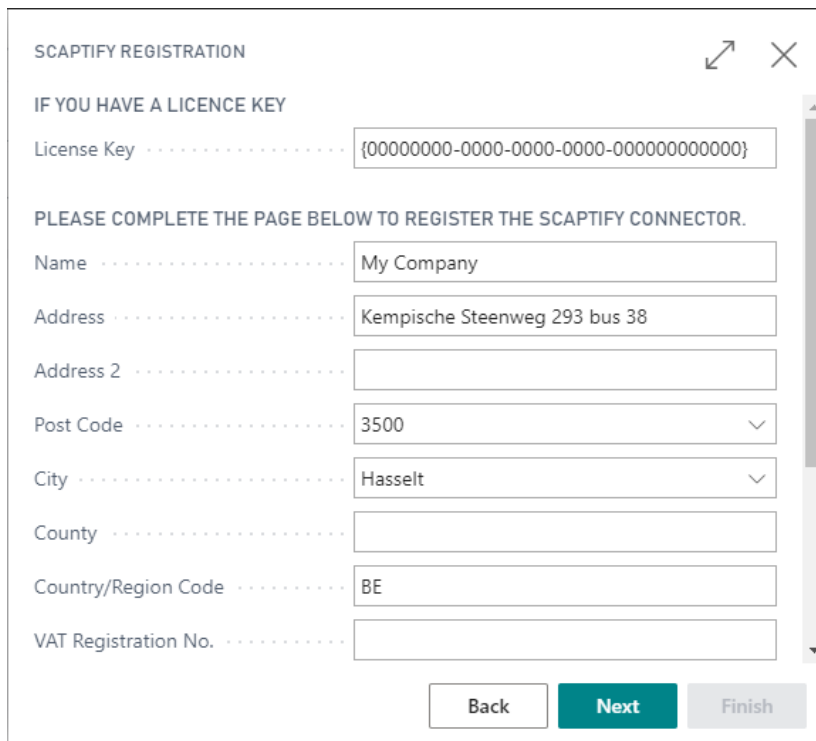
Welcome to the Scaptify Connector registration

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.

- 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

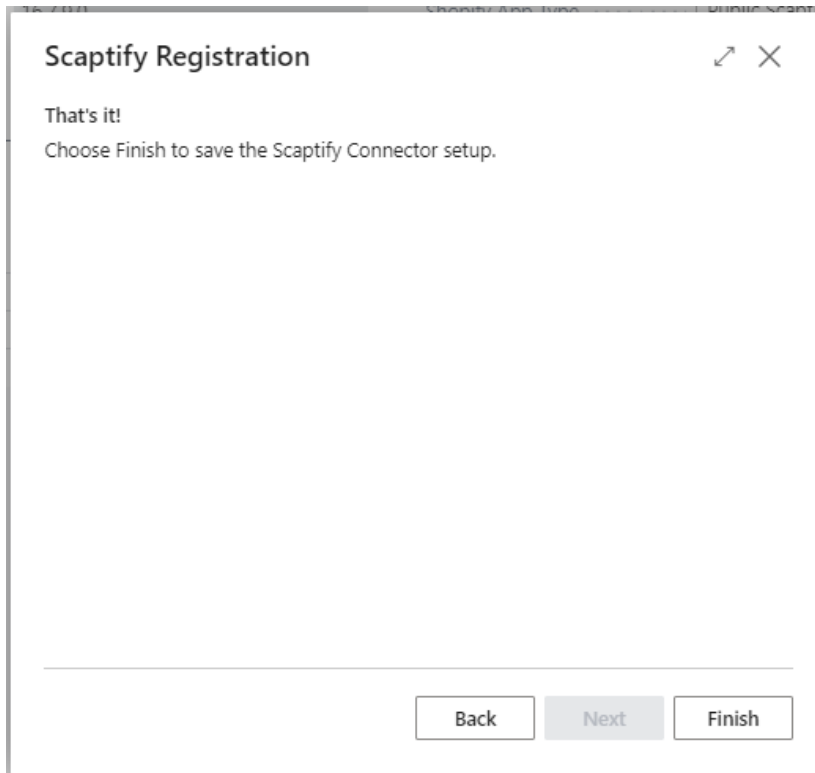
County .....

Country/Region Code ..... BE

VAT Registration No. ....



- 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.



Scaptify Connector Setup

Register | Shops | More options

**Connector Info**

License Key ..... [License Key]      Shopify App Type ..... Public Scaptify App on Shopify

Version ..... 16.7.9.0

**Restrictions**

Shopify License Restrictions ▾

Name ↑	Periode	Value
→ Orders	Month	999999
WebShops		99

### 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'.

Scaptify Connector Setup

Register | **Shops** | More options

**Connector Info**

License Key ..... [License Key]      Shopify App Type ..... Public Scaptify App on Shopify

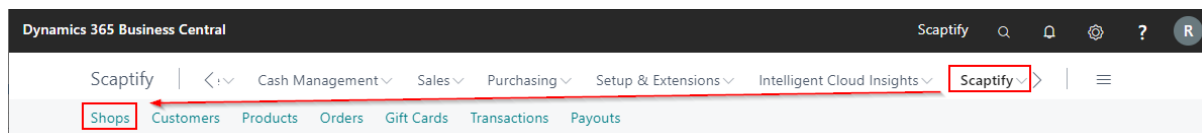
Version ..... 16.7.9.0

**Restrictions**

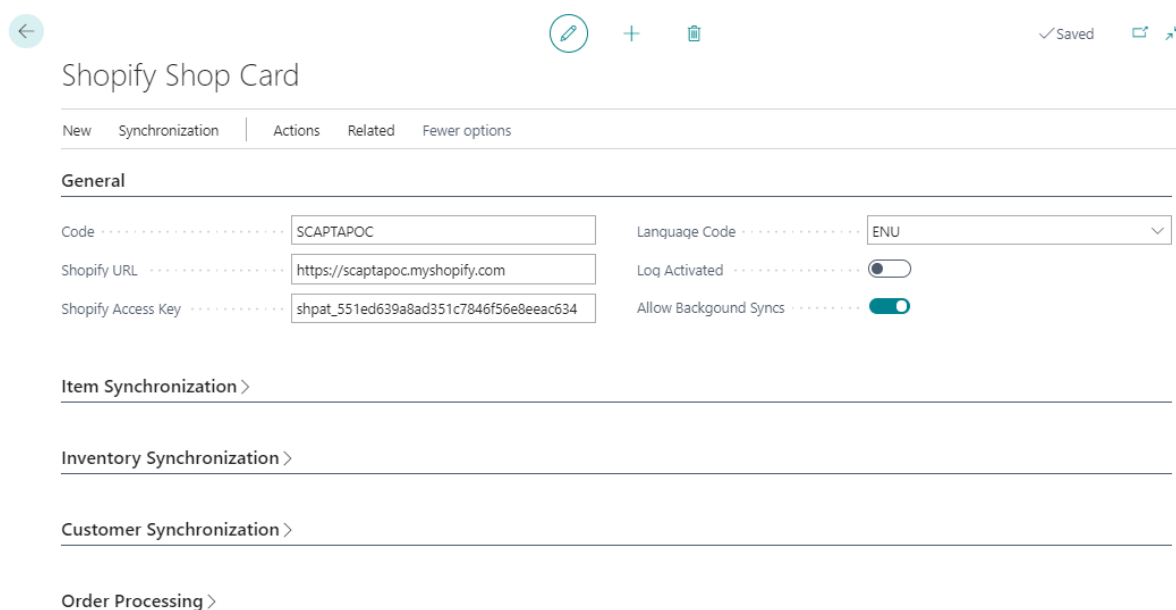
Shopify License Restrictions ▾

Name ↑	Periode	Value
→ Orders	Month	999999
WebShops		99

- Or follow the path 'Scaptify > Shops'



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 [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 Images	<input type="text" value="From Shopify"/>
Auto Create Unknown Items	<input checked="" type="checkbox"/>	Sync Item Extended Text	<input checked="" type="checkbox"/>
Shopify Can Update Items	<input checked="" type="checkbox"/>	Sync Item Attributes	<input checked="" type="checkbox"/>
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"/>
Customer Price Group	<input type="text" value="WEBSHOP"/>	SKU Field Separator	<input type="text" value="/"/>
Customer Discount Group	<input type="text" value="WEBSHOP"/>		

- 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	<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"/>	Export Customer to Shopify	<input checked="" type="checkbox"/>
Customer Mapping Type	<input type="text" value="By EMail/Phone"/>	Can Update Shopify Customers	<input type="checkbox"/>
Auto Create Unknown Customers	<input checked="" type="checkbox"/>	Name Source	<input type="text" value="Company Name"/>
Customer Template Code	<input type="text" value="CUST000001"/>	Name 2 Source	<input type="text" value="First Name and Last Name"/>
Default Customer	<input type="text" value="C00010"/>	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"/>

- Select how want to import your customers from Shopify
  - Not
  - With order import
  - All customers
- Select how you want to map customers
  - By email/phone
  - By bill-to info
- 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	<input type="text" value="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 ..... <input type="text" value="To Shopify"/>	Sync Item Images ..... <input type="text" value="To Shopify"/>
Auto Create Unknown Items .. <input type="checkbox"/>	Sync Item Extended Text ..... <input checked="" type="checkbox"/>
Shopify Can Update Items ..... <input type="checkbox"/>	Sync Item Attributes ..... <input checked="" type="checkbox"/>
Can Update Shopify Products .. <input checked="" 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"/>
Customer Price Group ..... <input type="text" value="WEBSHOP"/>	SKU Field Separator ..... <input type="text" value="/"/>
Customer Discount Group ..... <input type="text" value="LARGE ACC"/>	

- 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' menu is highlighted with a red box. Below it, the 'Products' menu item is also highlighted with a red box. A red arrow points from the 'Products' menu to the 'Products' tab in the 'Shopify Shop Card' section. In the 'Shopify Shop Card' section, the 'Products' tab is selected, and the 'Add Items' button is highlighted with a red box. Below this, the 'SHOPIFY PRODUCTS' section is shown, with the 'Process' button highlighted with a red box and the 'Add Items' button also highlighted with a red box.



SHOPIFY ADD ITEM TO SHOPIFY ↗

**GroupName**

ShopCode ..... SCAPTAPOC ▼

---

**Filter: Item**

× No. .... 192\* ▼

+ Filter...

---

Filter totals by:

+ Filter...

Schedule...
OK
Cancel

SHOPIFY PRODUCTS 🔍 🗑️ 📄

Reminder: your work date is 8-4-2019 Use today | Change to... | Turn off reminder

Search Process Synchronization Page Actions Fewer options
🔍 ☰

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

Shopify Variants Manage

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		

**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 Inventory Factbox** ▼

Shopify Stock    Last Calculated Stock    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.

← SHOPIFY PRODUCTS

Search **Process** Synchronization Page | Actions Fewer options

Map Product Add Items **Tags**

4483598188616	:	26-2-2020 14:21		
4483598286920		26-2-2020 09:31		
4483607265352		26-2-2020 13:44	Assorted Tables	First Up Consultants
4483607330888		26-2-2020 13:56	Miscellaneous	Fabrikam, Inc.

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
4483598188616	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

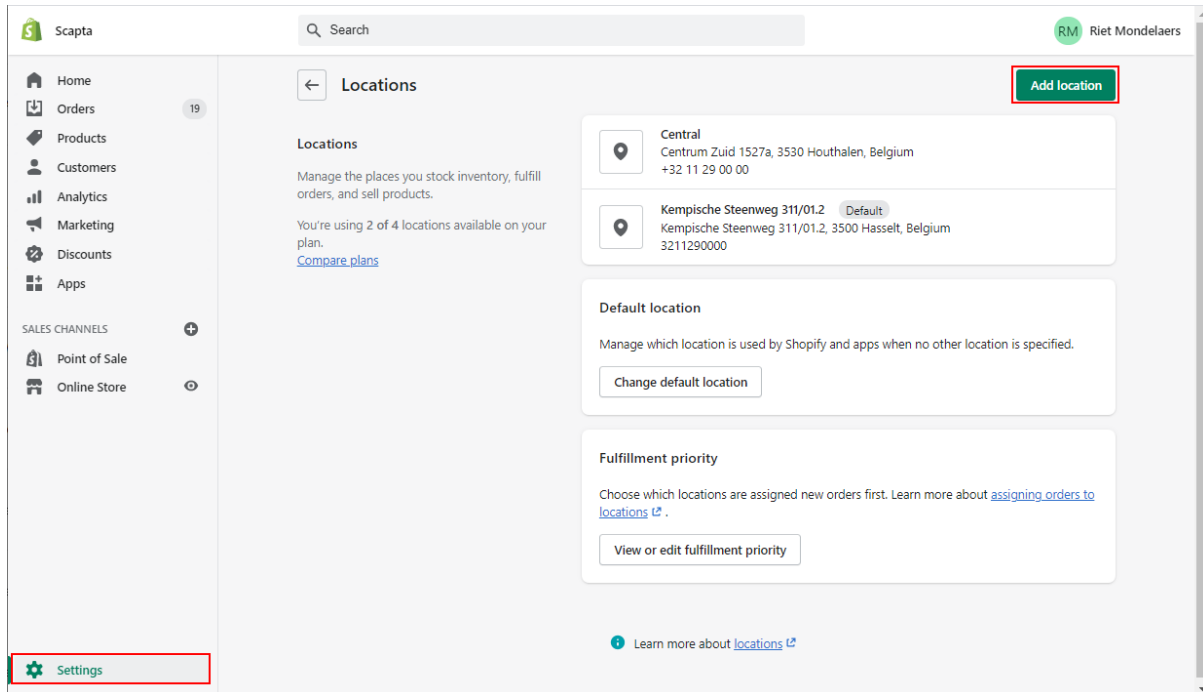
Id ↑	Item No.	Variant No.	Title	Option 1 Name	Option 1 Value	Option 2 Name	Opti
317320264418...	1925-W	-	Conference Bundle 1-6	Unit of Measure	PCS		

### 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

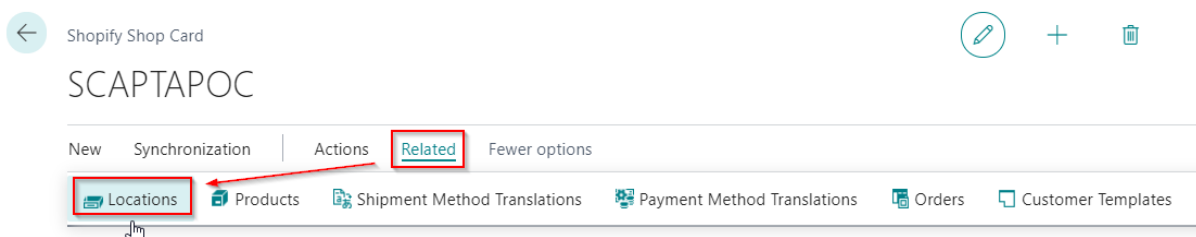
### 3.1.2 Setup locations

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

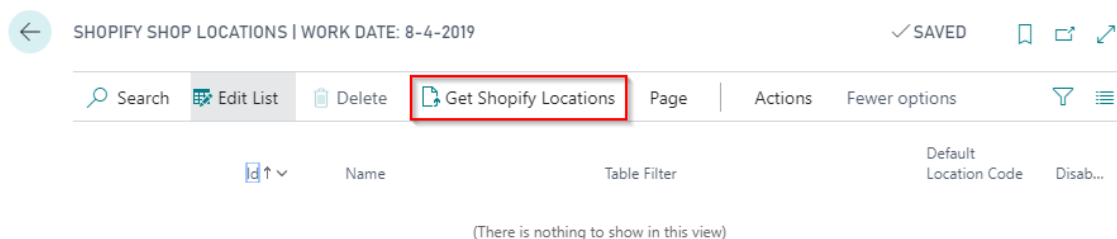


These locations need to be available in Microsoft Dynamics 365 Business Central.

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

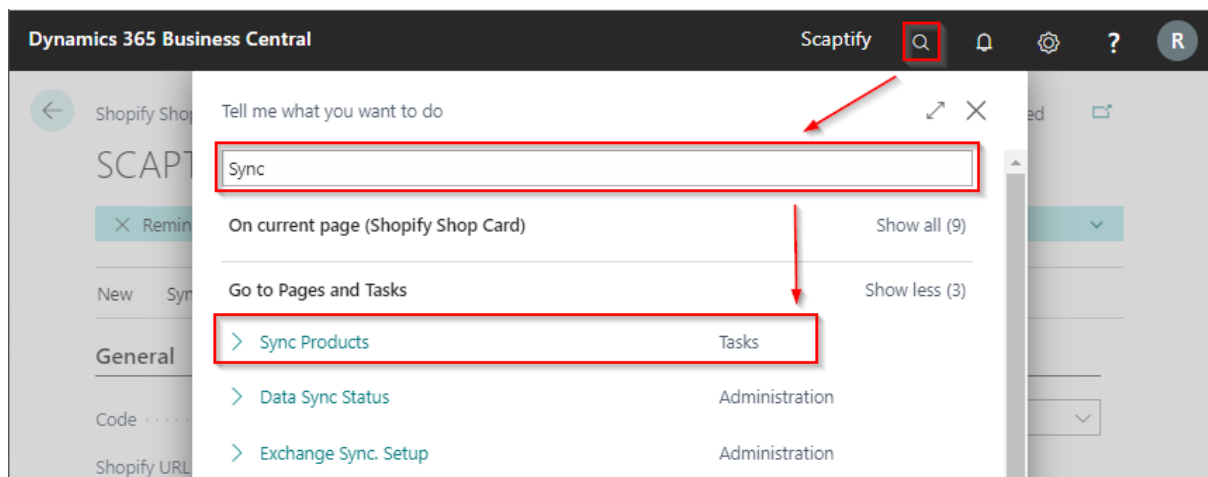
Id ↑	Name	Table Filter	Default Location Code	Disab...
6108167	Central			<input checked="" type="checkbox"/>
→ 49682579	Kempische Steenweg 311/01.2	MAIN	MAIN	<input type="checkbox"/>

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":





Sync Products ↗ ✕

---

Filter: Shopify Shop

[+ Filter...](#)

---

Advanced >

---

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

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.

The screenshot shows the Shopify admin interface. The left sidebar contains a navigation menu with 'Products' highlighted. The main content area is titled 'Products' and features a search bar and a table of products. The table has columns for 'Product', 'Inventory', 'Type', and 'Vendor'. The products listed are:

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**

**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

**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**

[View all tags](#)

Vintage, cotton, summer

Desk ×
Athens ×

**Images** Add image from URL Add images

**Variants** Reorder variants Edit options Add variant

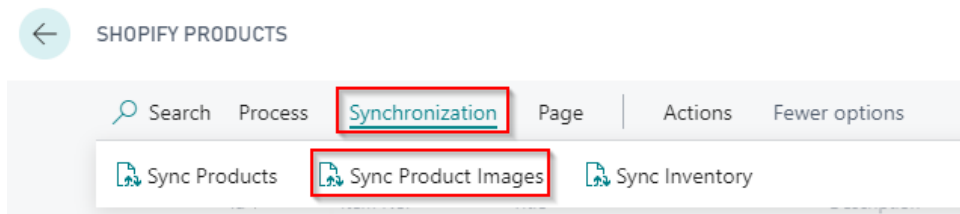
Select: All None BLACK WHITE PCS

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



### 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 ..... <input type="text" value="From Shopify"/>	Sync Item Extended Text ..... <input type="checkbox"/>
Auto Create Unknown Items ..... <input checked="" type="checkbox"/>	Sync Item Attributes ..... <input 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"/>	

- 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

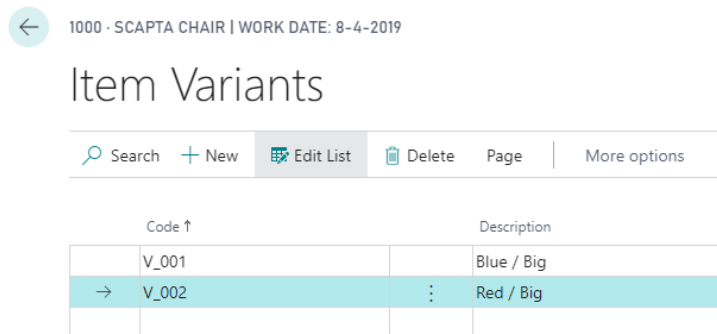
On the tab 'Synchronization' of the Shopify Shop Card, you can indicate if and how you want to synchronize variants and stockkeeping units from Shopify to Dynamics 365 Business Central.

**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.



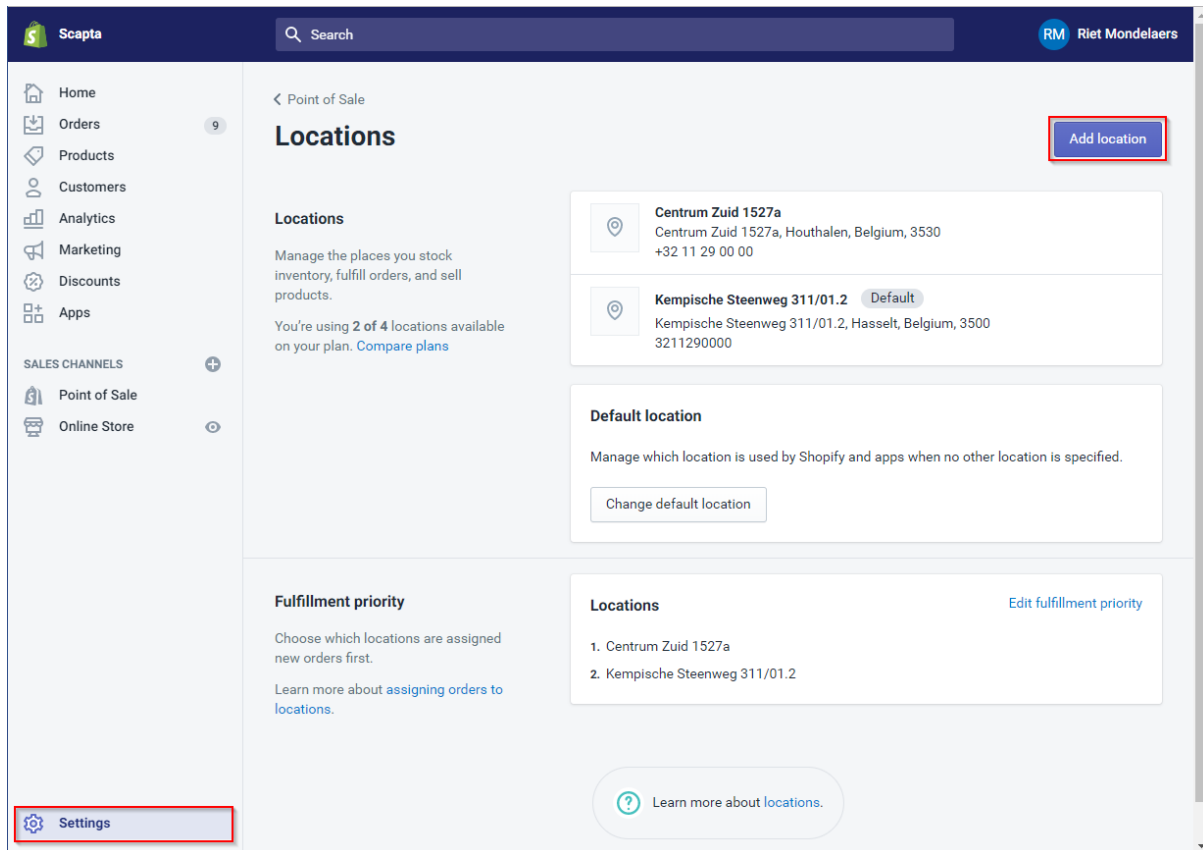
- **SKU Type**  
Define if and how you want to create variants in Dynamics 365 Business Central. The option you select is what you have defined in the SKU field in Shopify.
  - Blanc  
= You do not want to create variants.
  - Item no.  
= The item number is defined in the SKU field in Shopify. The SKU's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

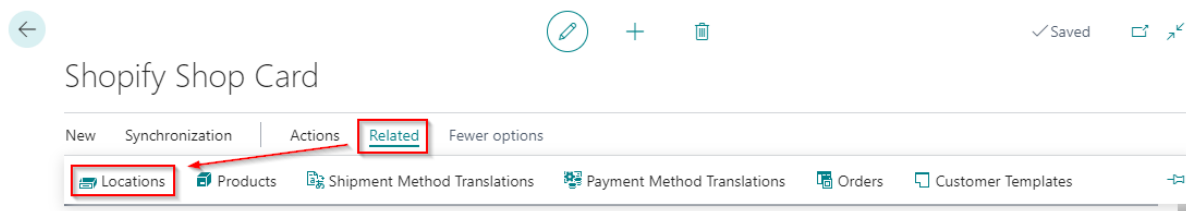
### 3.2.2 Setup locations

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



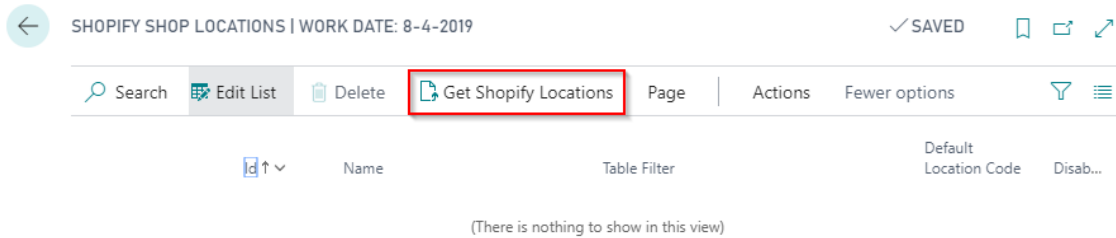
These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations



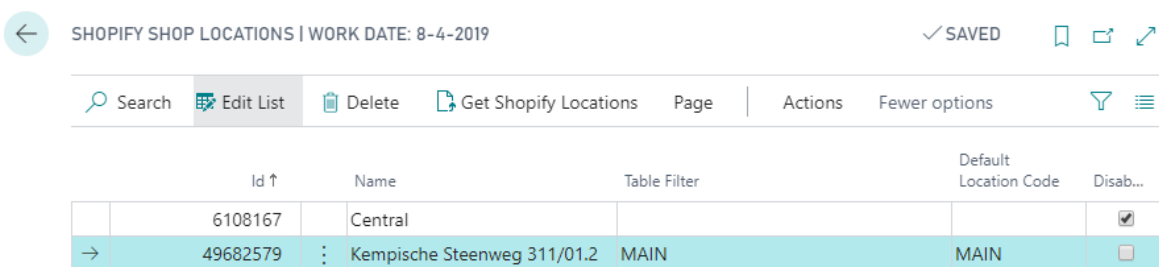
Use the function 'Get Shopify Locations' to get the locations from Shopify.





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

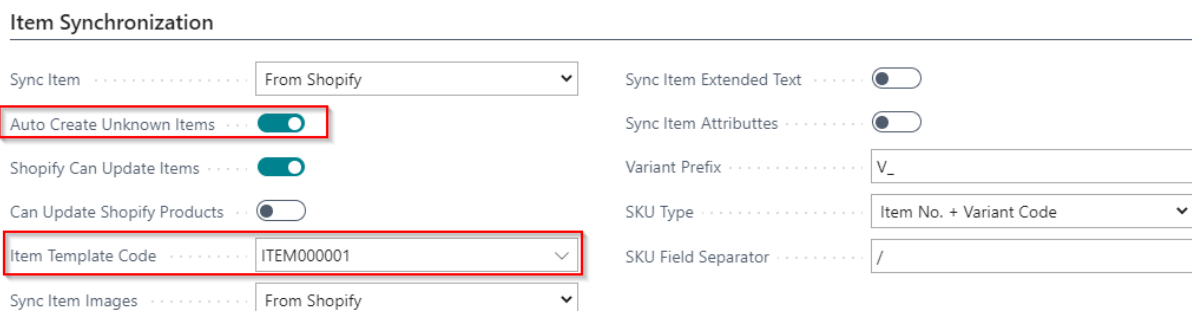
- Table filter: determines the location(s) for which the stock must be counted.
- Default location: determines the location to be used in the orders.



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, a pencil icon, a plus sign, and a trash icon. Below this is the title 'Shopify Shop Card'. A menu bar contains 'New', 'Synchronization', 'Actions', 'Related', and 'Fewer options'. The 'Synchronization' menu is expanded, showing options: 'Sync Products', 'Sync Product Images', 'Sync Inventory', 'Sync Customers', 'Sync Payouts', and 'Sync All'. Below the menu is a header for 'SHOPIFY PRODUCTS | WORK DATE: 8-4-2019' with a 'SAVED' status and icons for bookmark, copy, and share. A secondary menu bar includes 'Search', '+ New', 'Edit List', 'Delete', and 'Page'. A table of products is displayed with columns: Id ↑, Item No., Title, Description, and Created At.

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 is the title 'SHOPIFY PRODUCTS'. A menu bar contains 'Search', 'Process', 'Synchronization', 'Page', 'Actions', and 'Fewer options'. The 'Synchronization' menu is expanded, showing options: 'Sync Products', 'Sync Product Images', and 'Sync Inventory'. The 'Sync Product Images' option is highlighted with a red box.



## 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

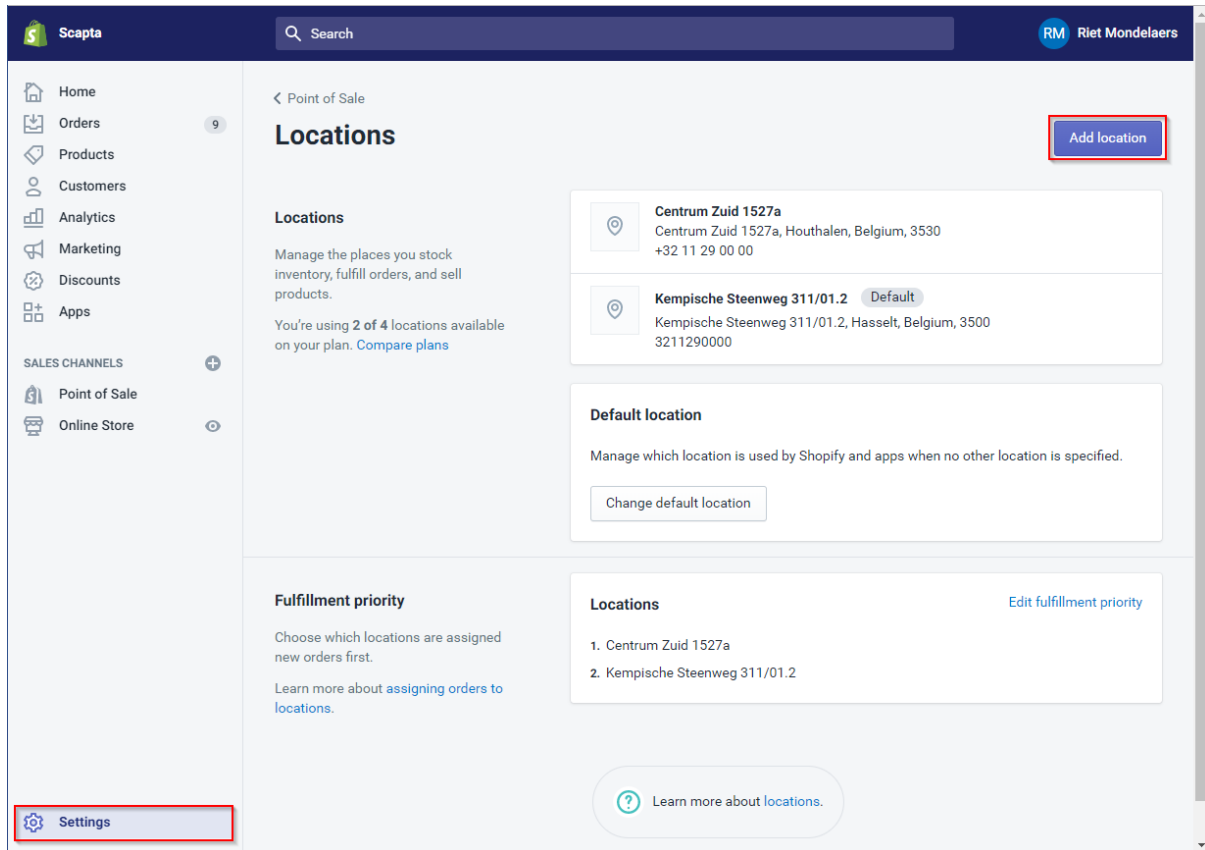
Inventory Tracked

Default Inventory Policy

- 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.

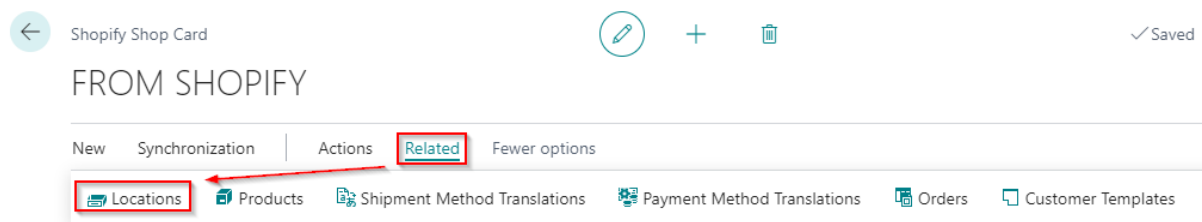
### 4.2 Setup locations

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

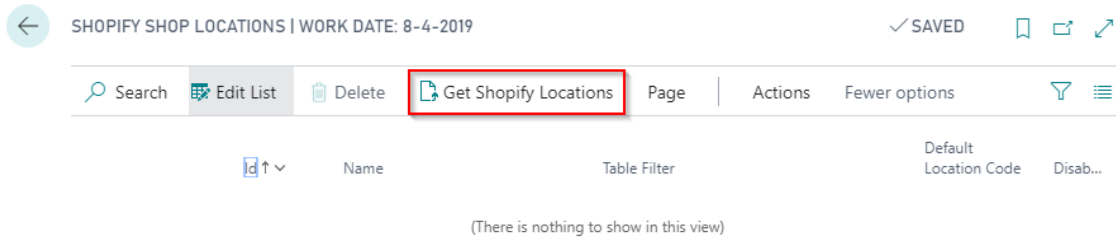


These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations

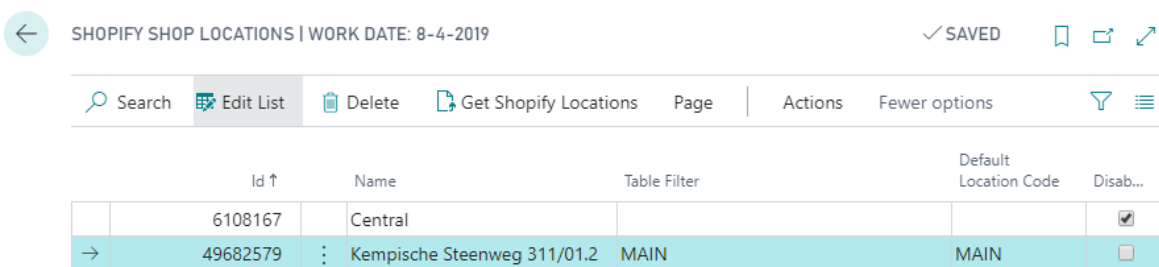


Use the function 'Get Shopify Locations' to get the locations from Shopify.



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.

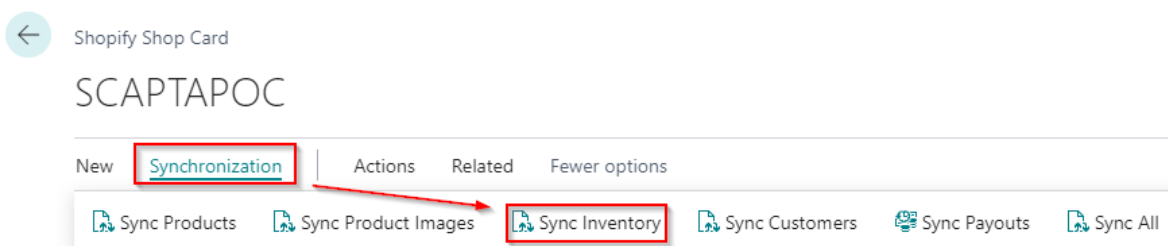


Uncheck 'Disable' if you want to sync the inventory for this location to Business Central.

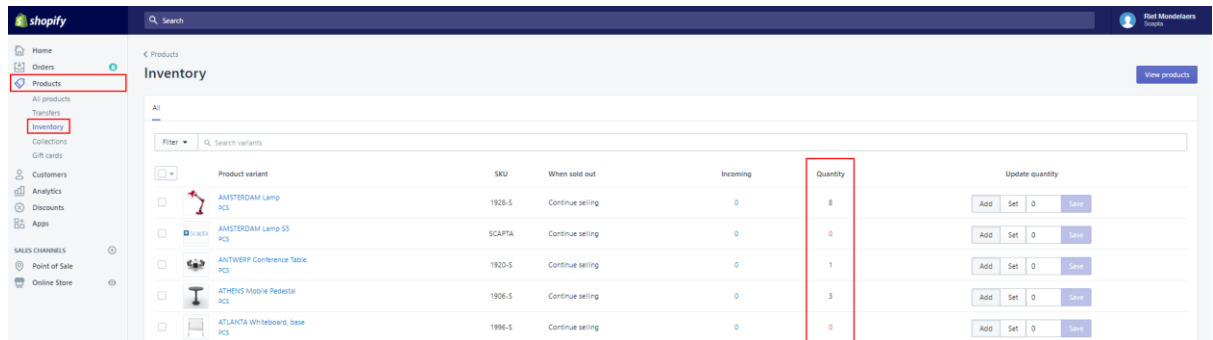
### 4.3 Execute stock synchronization

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

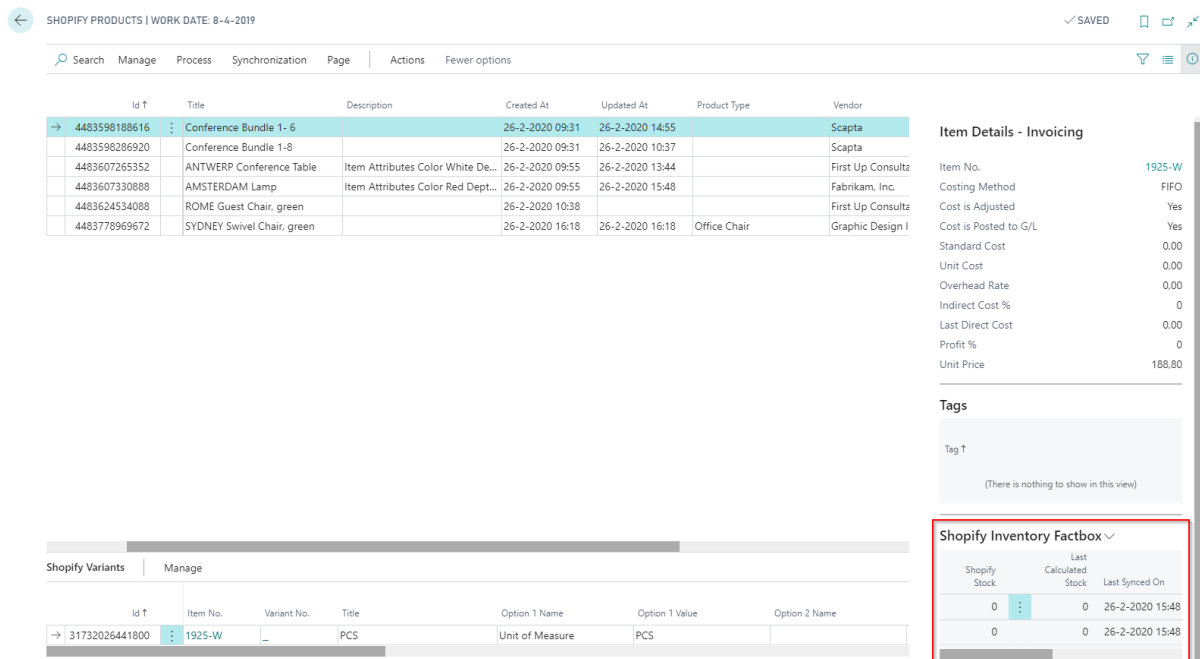
The inventory of Shopify goes to Business Central. If there is a difference with the calculated inventory in Business Central, the inventory is updated in Shopify.



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



On 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	Export Customer to Shopify	<input checked="" type="checkbox"/>
Customer Mapping Type	By EMail/Phone	Can Update Shopify Customers	<input type="checkbox"/>
Auto Create Unknown Customers	<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

- 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.
- Customer Mapping Type  
Select how you want to map customers.
  - By Email/Phone
  - By Bill-to Info
- 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

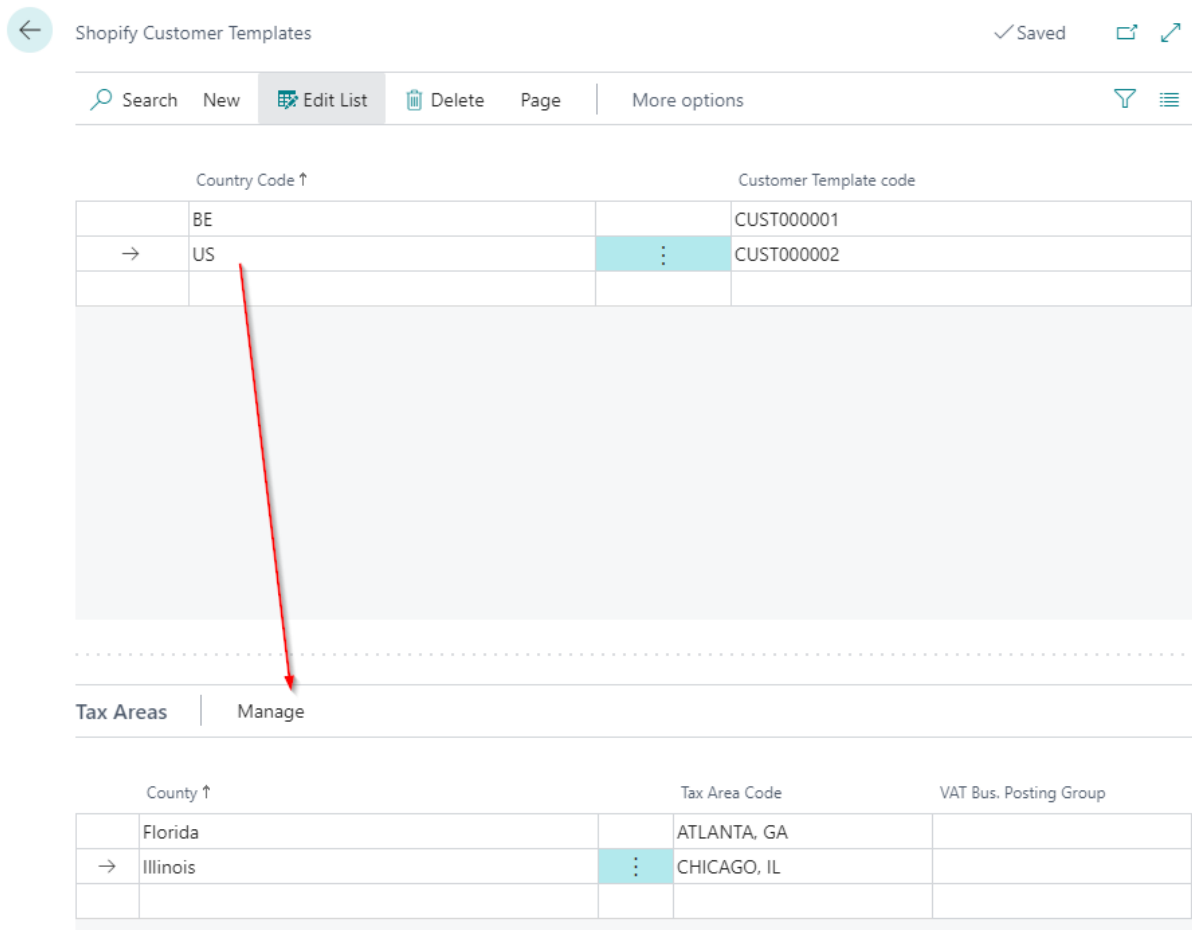
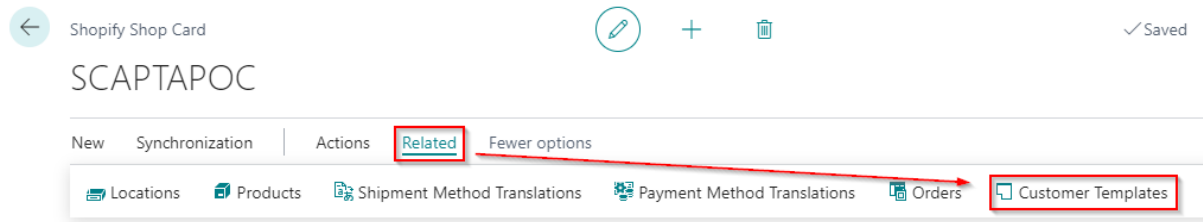
## 5.2 Customer template per country

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.



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>



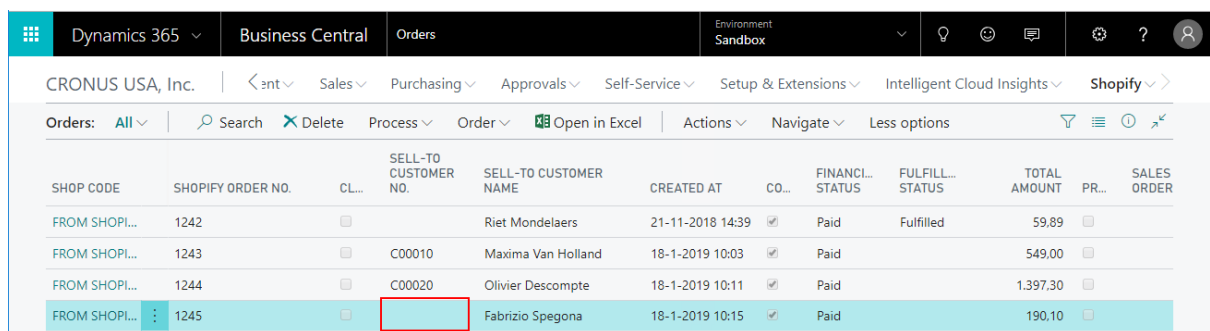
# Scaptify Shopify Connector User Guide

VERSION 7.9 | 19-4-2021

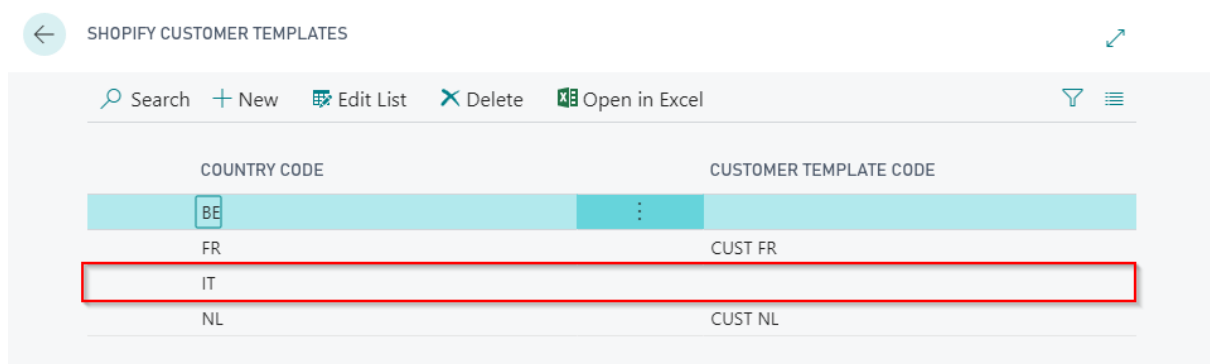
When you use multiple VAT/tax percentages, NAV should be leading. Furthermore, the item should already exist in NAV. A new item is created based on the defined item template and uses the VAT/tax percentage defined in this template, not the one set in the Shopify Shop.

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...	FINANCL. STATUS	FULFILL... STATUS	TOTAL AMOUNT	PR...	SALES ORDER
FROM SHOPI...	1242	<input type="checkbox"/>		Riet Mondelaers	21-11-2018 14:39	<input checked="" type="checkbox"/>	Paid	Fulfilled	59.89	<input type="checkbox"/>	
FROM SHOPI...	1243	<input type="checkbox"/>	C00010	Maxima Van Holland	18-1-2019 10:03	<input checked="" type="checkbox"/>	Paid		549.00	<input type="checkbox"/>	
FROM SHOPI...	1244	<input type="checkbox"/>	C00020	Olivier Descompte	18-1-2019 10:11	<input checked="" type="checkbox"/>	Paid		1.397.30	<input type="checkbox"/>	
FROM SHOPI...	1245	<input type="checkbox"/>		Fabrizio Spegona	18-1-2019 10:15	<input checked="" type="checkbox"/>	Paid		190.10	<input type="checkbox"/>	



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. At the top, the navigation bar includes 'CRONUS USA, Inc.' and various functional areas like 'Sales', 'Purchasing', and 'Setup & Extensions'. The 'Customers' tab is selected and highlighted with a red box. Below the navigation bar, the 'Customers' list is displayed. A 'New' button is highlighted with a red box, and a dropdown menu is open, showing the 'Start Customer Sync' option also highlighted with a red box. The list contains three customer records with columns for Id, Customer No., Last Name, E-Mail, Phone No., State, and a verification checkbox.

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

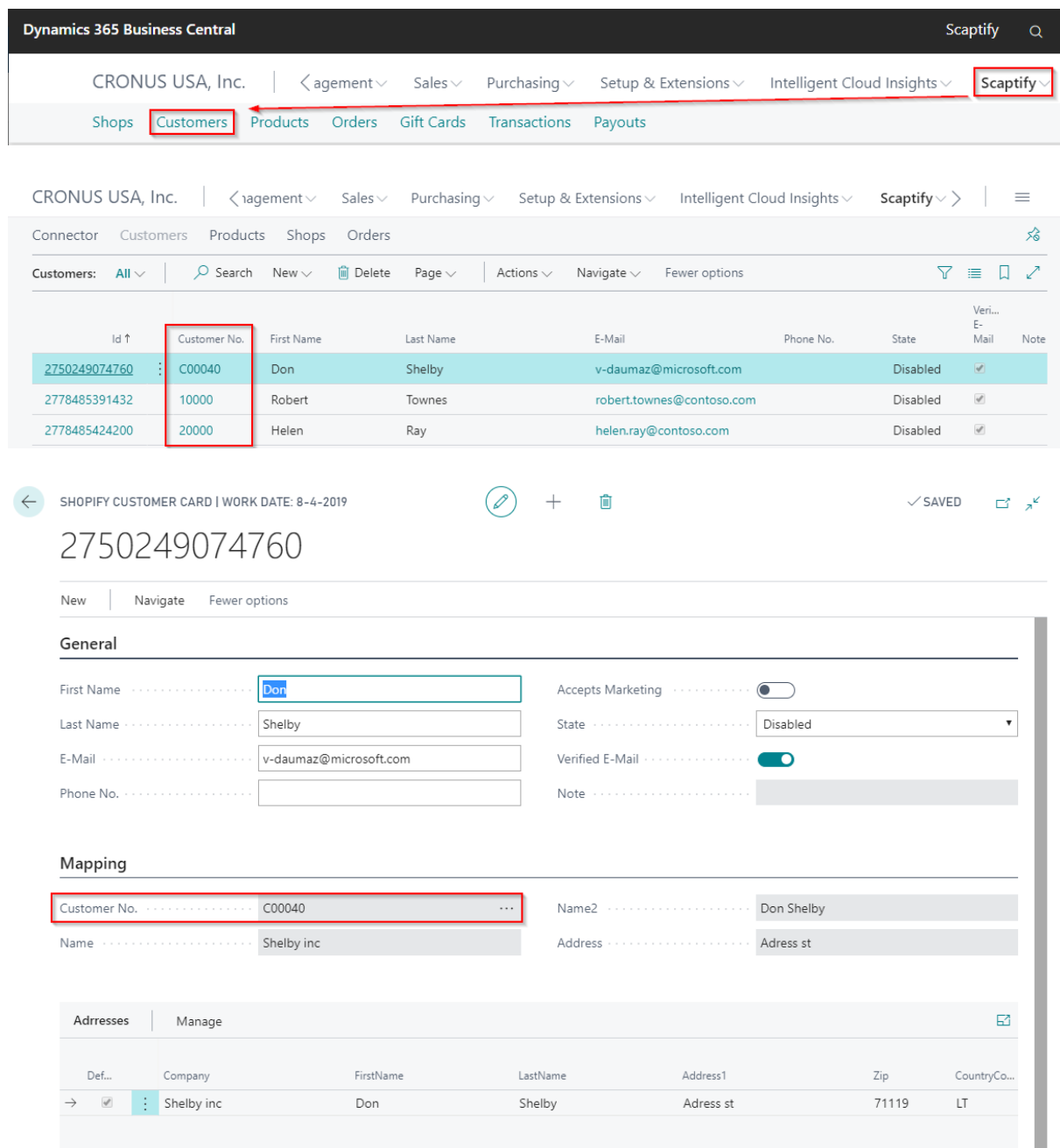
- Via the Shopify Shop Card

The screenshot shows the Dynamics 365 Business Central interface. The navigation bar is at the top, and the 'Shops' tab is selected and highlighted with a red box. Below the navigation bar, the 'Shopify Shop Card' is displayed. The 'SCAPTAPOC' shop name is visible. A 'New' button is highlighted with a red box, and a dropdown menu is open, showing the 'Synchronization' option also highlighted with a red box. Below the dropdown, the 'Sync Customers' button is highlighted with a red box. Other sync options like 'Sync Products', 'Sync Product Images', 'Sync Inventory', 'Sync Payouts', and 'Sync All' are also visible.



## 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 navigation bar includes 'CRONUS USA, Inc.' and various menu items. The 'Customers' menu item is highlighted with a red box. Below the navigation bar, a table lists customer records. The first row is highlighted, and its 'Customer No.' field is also highlighted with a red box. Below the table, the 'SHOPIFY CUSTOMER CARD' is displayed for the customer with ID 2750249074760. The 'General' section shows fields for First Name (Don), Last Name (Shelby), E-Mail (v-daumaz@microsoft.com), and State (Disabled). The 'Mapping' section shows the 'Customer No.' field (C00040) highlighted with a red box, and other fields like Name (Shelby inc) and Address (Adress st). At the bottom, the 'Addresses' section shows a table with columns for Def..., Company, FirstName, LastName, Address1, Zip, and CountryCo... The first row shows a checked 'Def...' box, 'Shelby inc' as the company, 'Don' as the first name, 'Shelby' as the last name, 'Adress st' as the address, '71119' as the zip, and 'LT' as the country code.

### 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.

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 SHOPL...	Low	<input type="checkbox"/>		Trey Research	10/14/2020 1:34 ...	<input checked="" type="checkbox"/>	Paid	Unfulfilled	10.00
WEB1291	FROM SHOPL...	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

**Customer Templ... .. CUST000001** | Test .....

Sell-to Customer... \* | Created At ..... 10/8/2020 9:21 AM

Shipping Method .. | Document Date .... 10/8/2020

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 .....  Accepts Marketing .....

Last Name .....  State .....

E-Mail .....  Verified E-Mail .....

Phone No. ....  Note .....

### Mapping

Customer No. ....  Name2 .....

Name .....  Address .....

### Addresses

Manage 📧

Def...	Company	FirstName	LastName	Address1	Zip	CountryCo...
→ <input checked="" type="checkbox"/>	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	40100	Shopify Order No. on Doc. L...	<input checked="" type="checkbox"/>
Sold Gift Card Account	40100	Auto Create Orders	<input type="checkbox"/>
Tip Account	40100	Tax Area Source	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	<input type="text" value="Riet Mondelaers"/>	Due Date	<input type="text" value="27-3-2020"/>
Contact	<input type="text" value="Riet Mondelaers"/>	Requested Delivery Date	<input type="text"/>
Posting Date	<input type="text" value="8-4-2019"/>	External Document No.	<input type="text"/>
Order Date	<input type="text" value="8-4-2019"/>		

**Scaptify**

Shopify Order No.

---

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

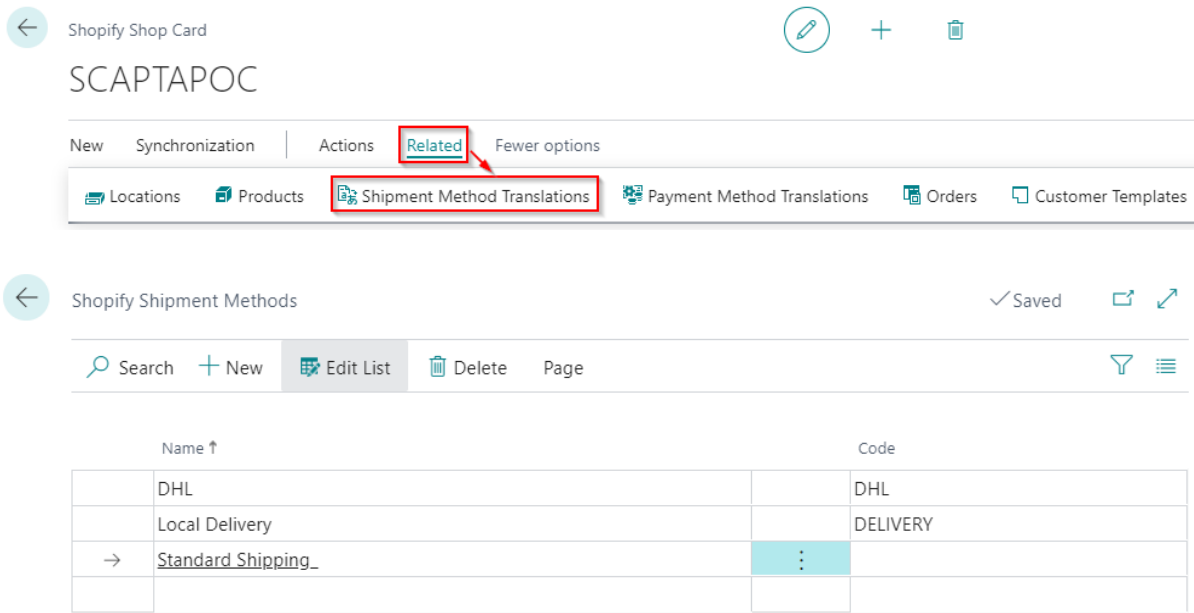
### 6.1.1 Shipment method translations

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.

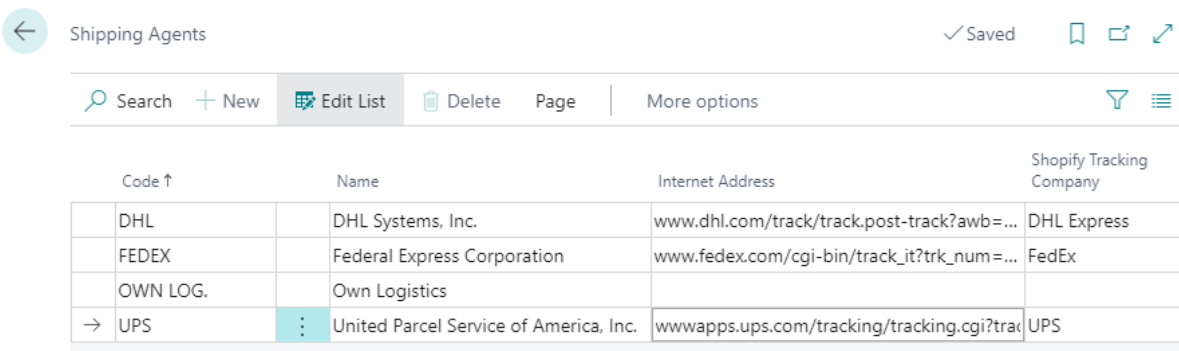


The screenshot shows the 'Shopify Shop Card' for 'SCAPTAPOC'. In the 'Related' section, 'Shipment Method Translations' is highlighted with a red box. Below, the 'Shopify Shipment Methods' list is shown with a table of translations.

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.



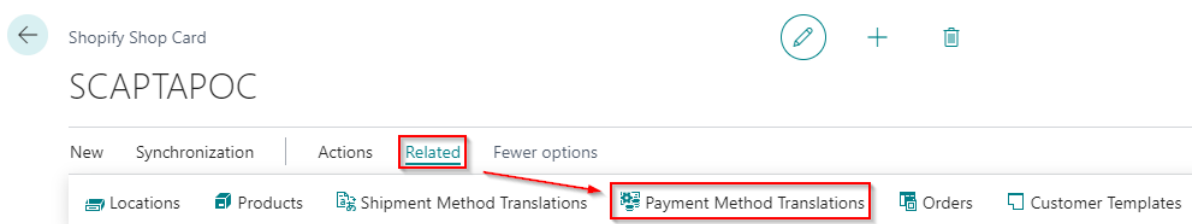
The screenshot shows the 'Shipping Agents' list in Microsoft Dynamics 365 Business Central. The table includes a new column for 'Shopify Tracking Company'.

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?tra	UPS



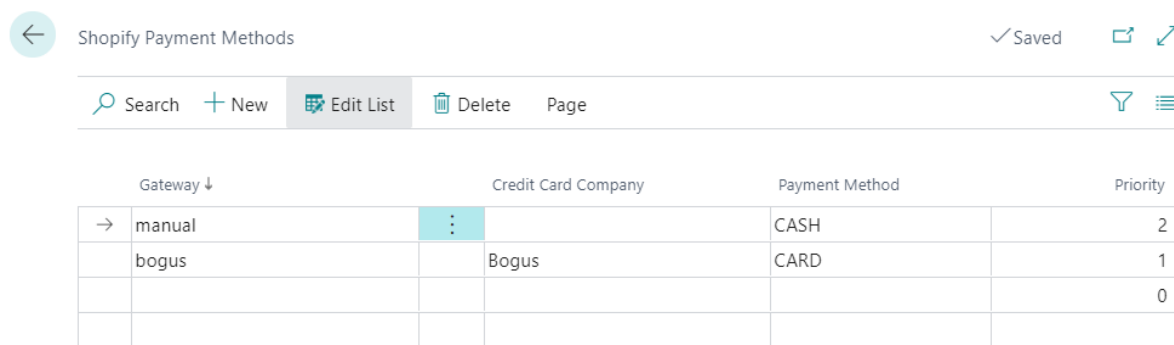
### 6.1.3 Payment method translations

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.



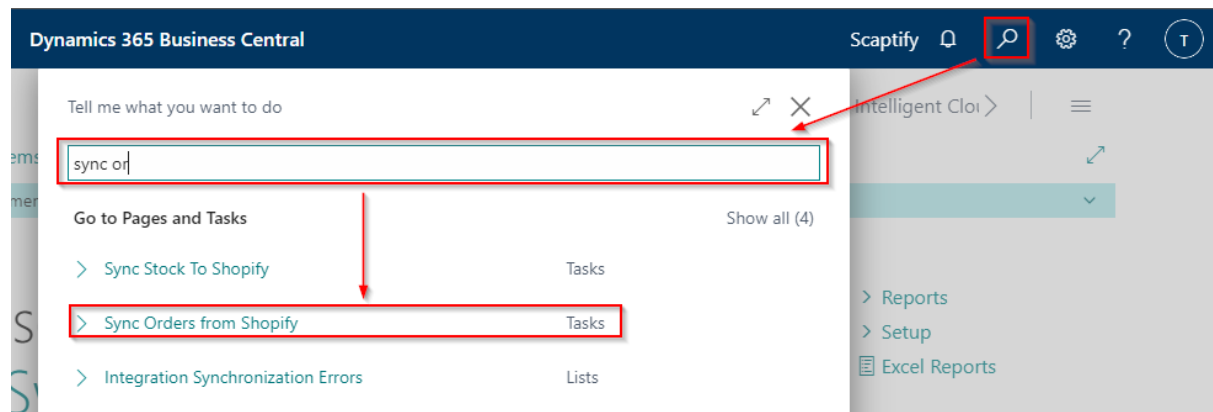


## 6.2 Execute Order Synchronization

### 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

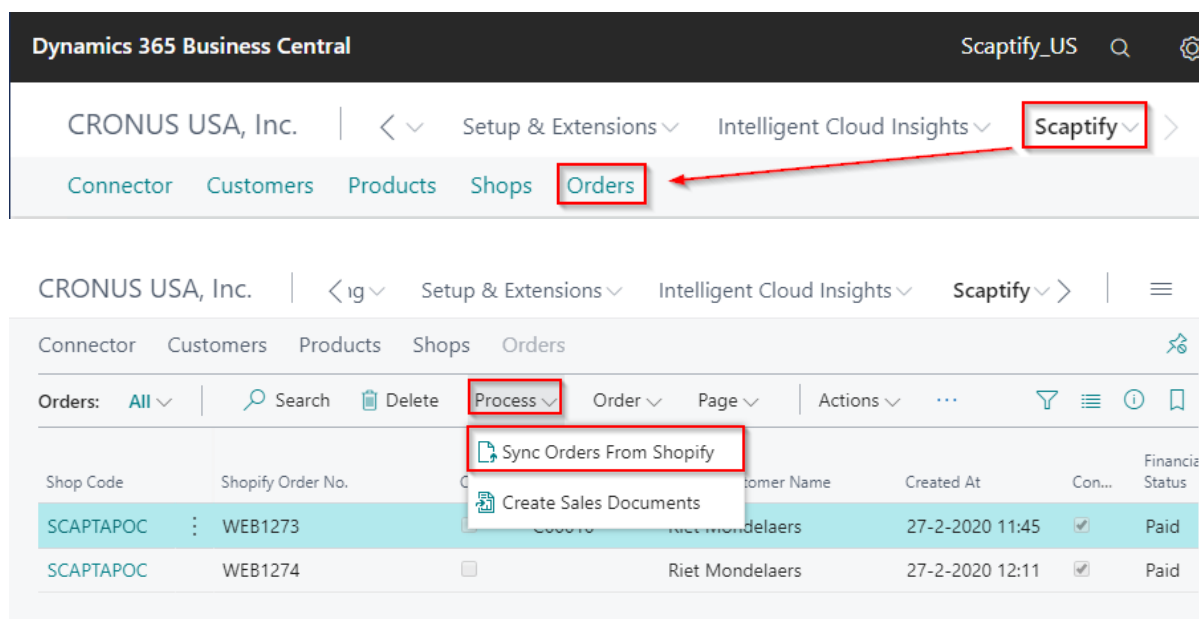
It is possible to apply filters to synchronize only a limited number of orders, e.g. only those who have been paid in full or whose risk level is low.

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.



### 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 [edit] + [trash]

### Report · 70007602 · Sync Orders from Shopify

Process | Report | **Actions** | Navigate | Less options

**Job Queue** [dropdown]

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

Report: 70007602 | Description: Sync Orders from Shopify | Status: On Hold

#### Report Parameters

Report Request Page Opti...  Printer Name: [input]

Report Output Type: None (Processing only)

#### Recurrence

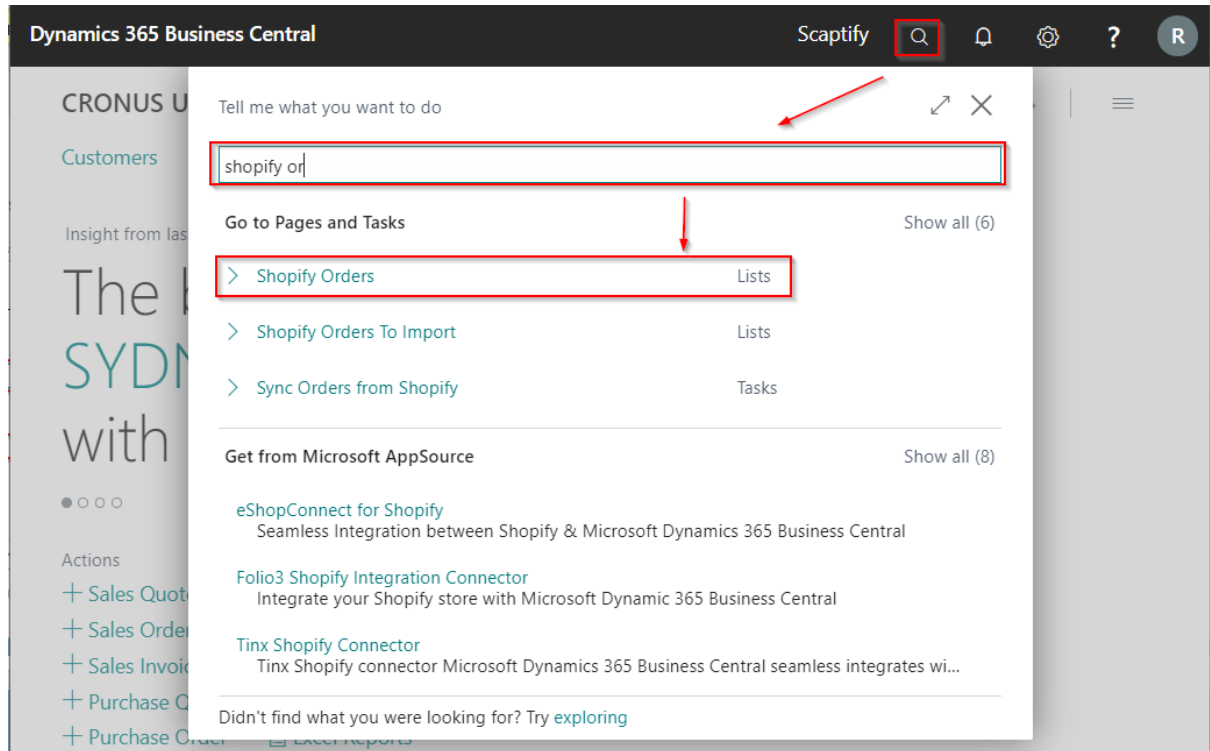
Recurring Job:

Run on Mondays:  Run on Tuesdays:  Run on Wednesdays:  Run on Thursdays:  Run on Fridays:  Run on Saturdays:  Run on Sundays:

Starting Time: 8:00:00 | Ending Time: 18:00:00 | No. of Minutes between ...: 1 | Inactivity Timeout Period: 0

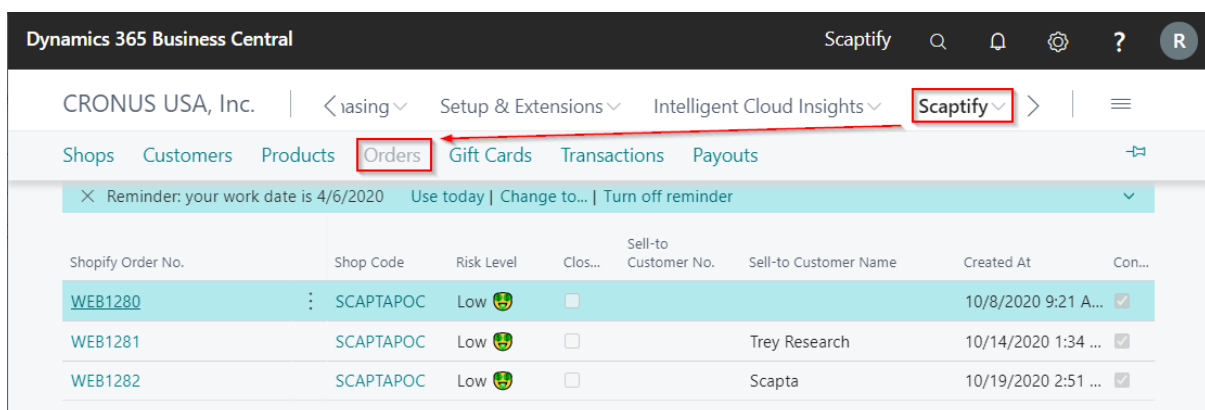
### 6.3 View Shopify Orders

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
<a href="#">WEB1280</a>	SCAPTAPOC	Low 🟢	<input type="checkbox"/>			10/8/2020 9
WEB1281	SCAPTAPOC	Low 🟢	<input type="checkbox"/>		Trey Research	10/14/2020
WEB1282	SCAPTAPOC	Low 🟢	<input type="checkbox"/>		Scapta	10/19/2020

### 6.4 Process Shopify Orders

Navigate to the Shopify Orders.

Dynamics 365 Business Central





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

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 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-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 .....	<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, 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
<b>Sell-to</b>		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".

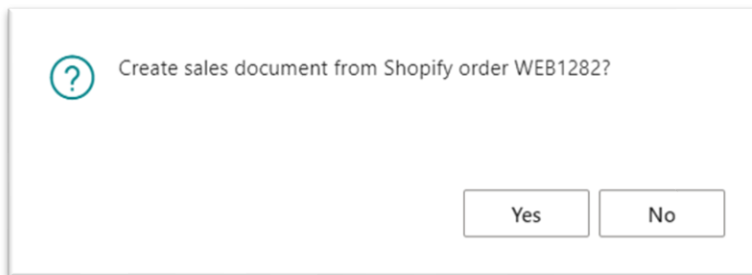
Shopify Order ✎ + 🗑️ 📄 ↗️

WEB1282 · Scapta

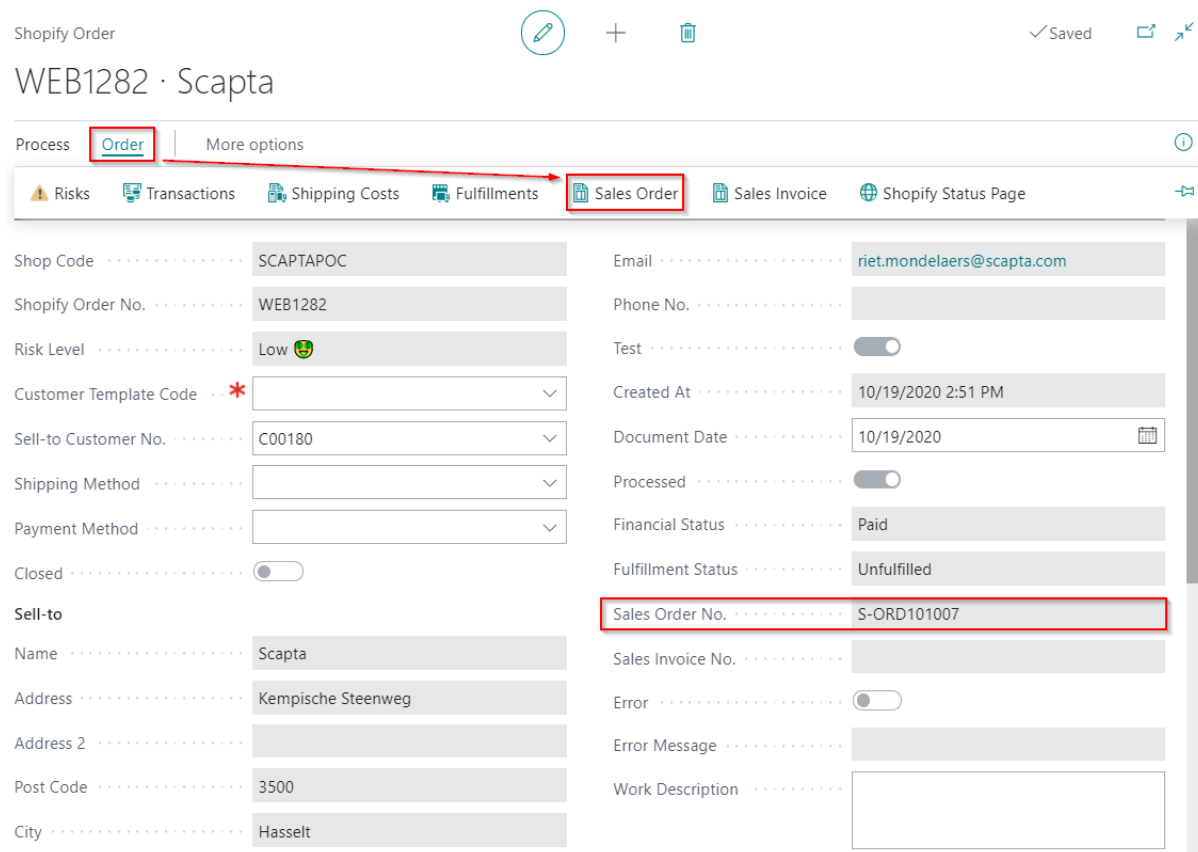
**Process** | Order | More options ⓘ

🔍 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"/>



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



Shipment costs are added to the sales order.  
If you checked the field 'Shopify order no. on doc. Line', the Shopify order number is visible in the sales lines.

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 .....	<input type="checkbox"/>
Customer Template Code .....		Created At .....	10/19/2020 2:51 PM
Sell-to Customer No. ....	10000	Document Date .....	10/19/2020
Shipping Method .....		Processed .....	<input type="checkbox"/>
Payment Method .....		Financial Status .....	Paid
Closed .....	<input type="checkbox"/>	Fulfillment Status .....	Unfulfilled
<b>Sell-to</b>		Sales Order No. ....	
Name .....	Scapta	Sales Invoice No. ....	
Address .....	Kempische Steenweg	Error .....	<input type="checkbox"/>
Address 2 .....		Error Message .....	3:27:36 PM Prices Including Tax must b...
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.

The screenshot displays the 'JOB QUEUE ENTRY CARD' for 'Report · 70007605 · Shopify Create Sales Orders'. The 'Actions' menu is open, showing options: 'Set Status to Ready' (highlighted), 'Set On Hold', 'Show Error', and 'Restart'. The card details include: Report: 70007605, Description: Shopify Create Sales Orders, Status: On Hold. Below the card are sections for 'Report Parameters' (Report Request Page Opti..., Report Output Type: None (Processing only), Printer Name) and 'Recurrence' (Recurring Job: off, Run on Mondays-Fridays: on, Run on Saturdays/Sundays: off, Starting/Ending Time, No. of Minutes between ...: 0, Inactivity Timeout Period: 0).

## 6.5 Synchronize Shipments to Shopify

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

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



 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



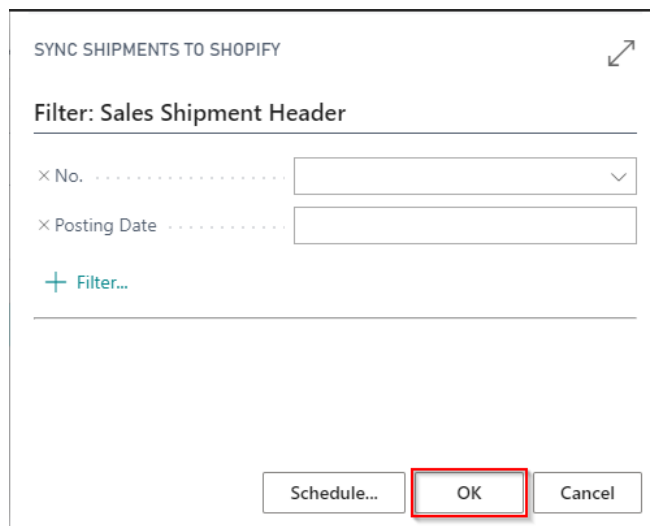
**AMSTERDAM Lamp × 1**  
BLUE / PCS

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





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	Description	Sync Shipments To Shopify
70007601	Earliest Start Date/Time	
<a href="#">Sync Shipments To Shopify</a>	Status	On Hold

#### Report Parameters

Report Request Page Opti...

Report Output Type: None (Processing only)

Printer Name:

#### 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

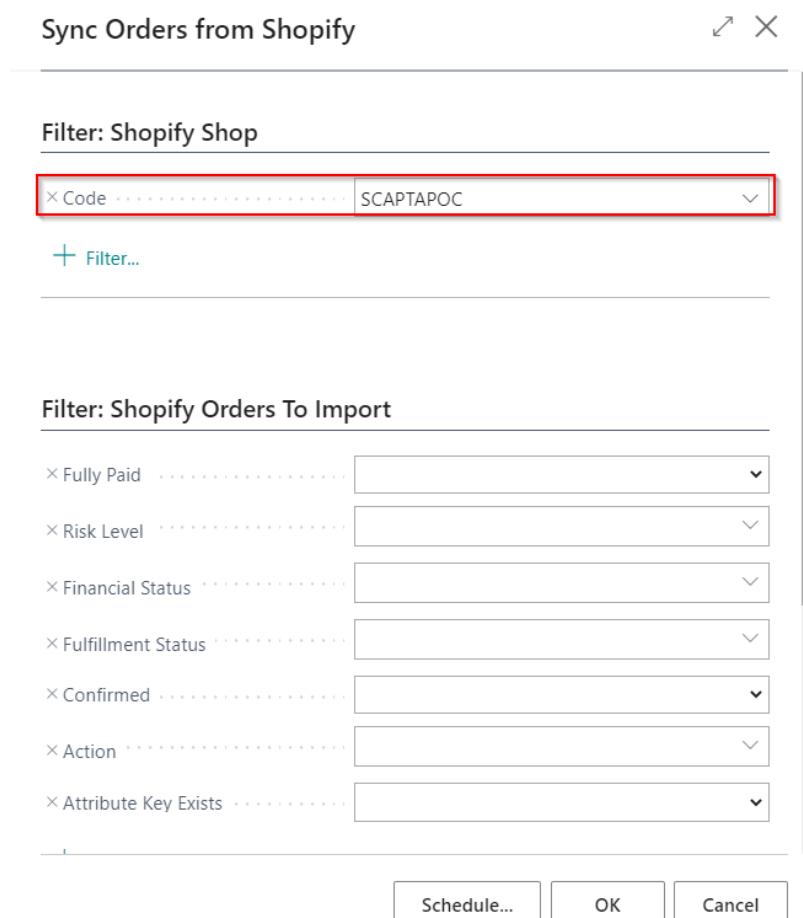


### 6.6 Synchronize orders from Shopify

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

The screenshot shows the Dynamics 365 Business Central interface. At the top, the breadcrumb navigation path is: CRONUS USA, Inc. > Management > Sales > Purchasing > Setup & Extensions > Intelligent Cloud Insights > **Scaptify** > **Shops** > Orders. The 'Shops' and 'Orders' items are highlighted with red boxes. Below the navigation bar, the 'SHOPIFY SHOP CARD | WORK DATE: 8-4-2019' is displayed for the shop 'SCAPTAPOC'. The 'Actions' menu is open, showing 'Navigate' (highlighted with a red box) and 'Fewer options'. Below the menu, the 'Orders' option is also highlighted with a red box. The main area displays 'SHOPIFY ORDERS | WORK DATE: 8-4-2019' with a table of orders. The 'Fulfillment Status' column in the table is highlighted with a red box.

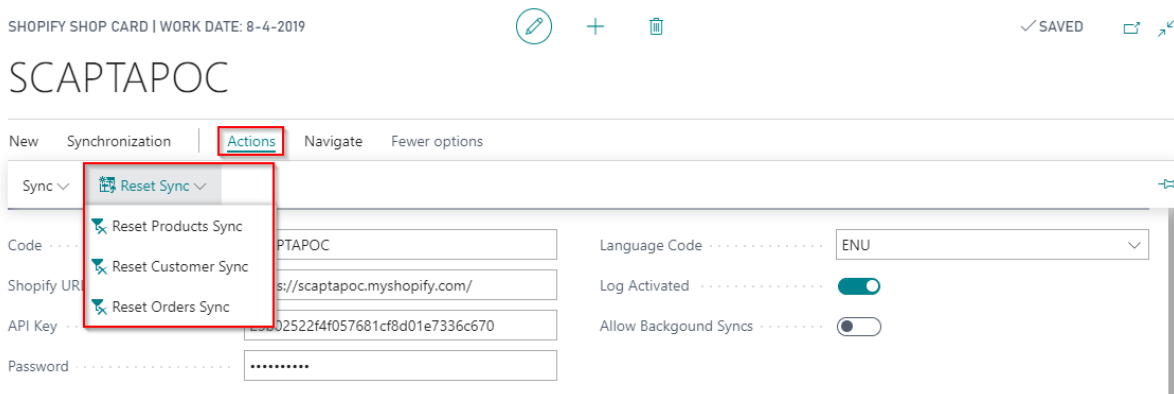
Shop Code	Shopify Order No.	Clos...	Sell-to Customer No.	Sell-to Customer Name	Created At	Con...	Financial Status	Fulfillment Status	Total Amount
SCAPTAPOC	WEB1272	<input checked="" type="checkbox"/>	C00010	Riet Mondelaers	26-2-2020 11:39	<input checked="" type="checkbox"/>	Paid	Fulfilled	59,89
SCAPTAPOC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

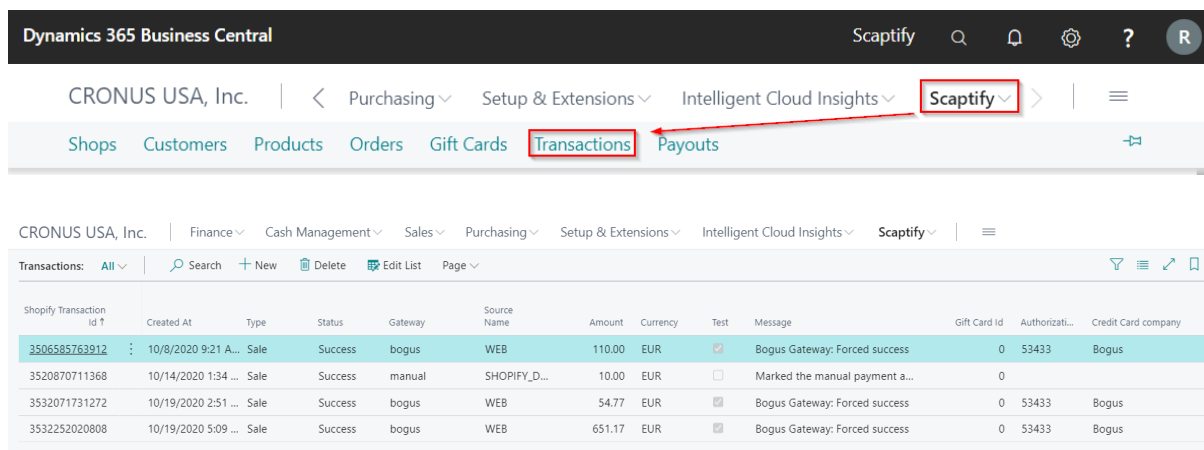
On the Shopify Shop card, there are functions available to reset the sync. This function ensures that when the sync is executed, all data is synced and not just the changes that have happened compared to the previous sync.

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



## 8. Transactions

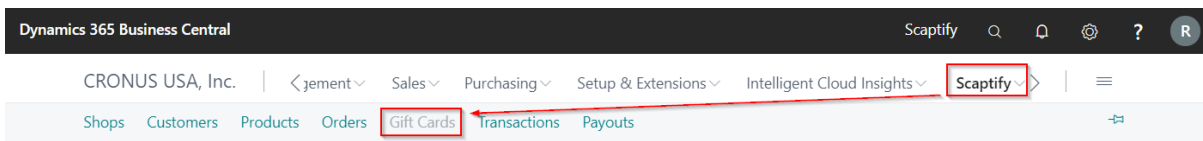
The transactions that took place in Shopify can be viewed in Business Central via 'Transactions'. They are synchronized together with the orders.



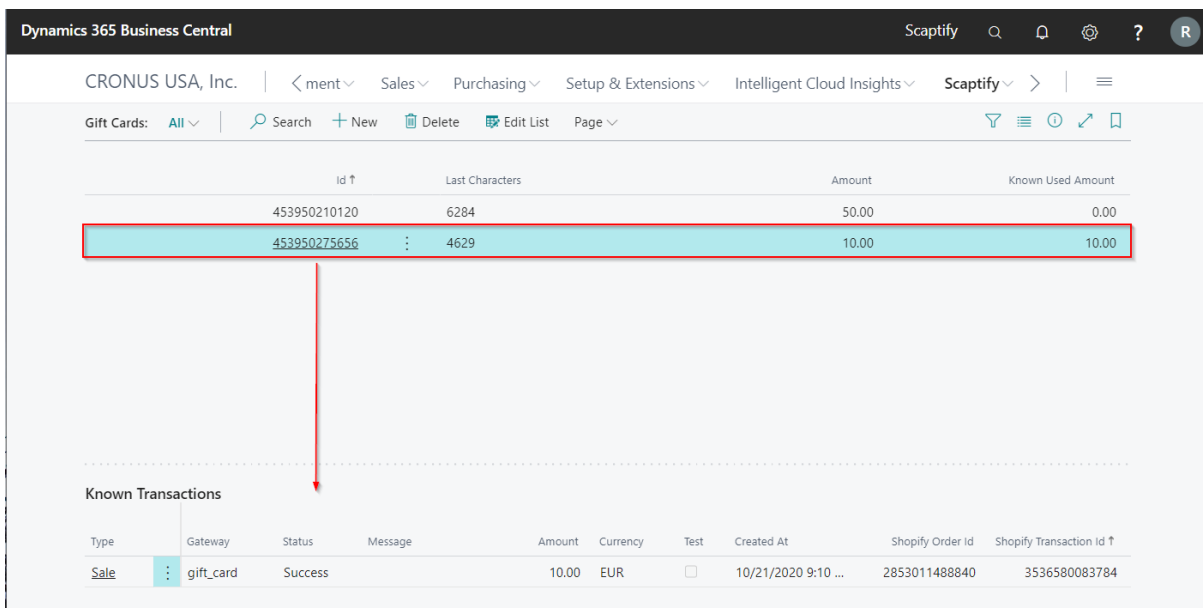


### 9. Gift Cards

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 de gift card with the relevant transactions.



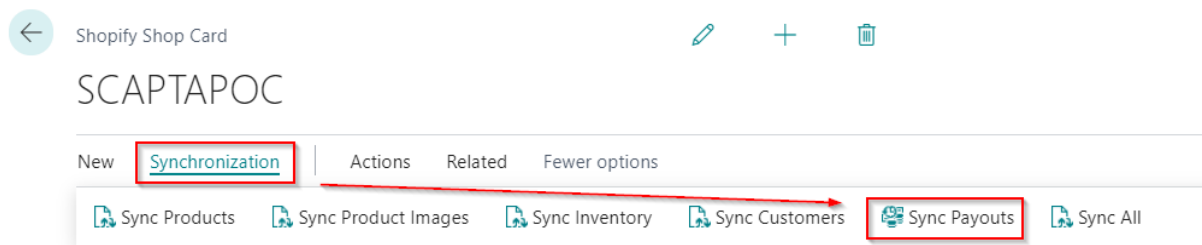


## 10. Payouts

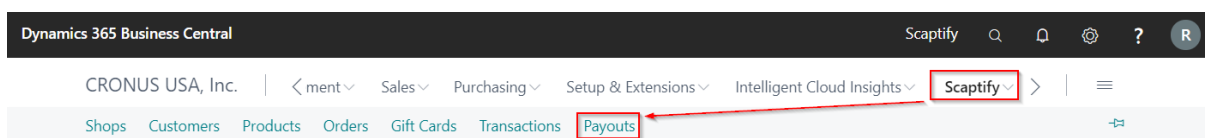
If your store has Shopify Payments enabled, then you receive payments through Shopify Payouts when a customer pays using Shopify Payments and specific accelerated checkouts.

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			



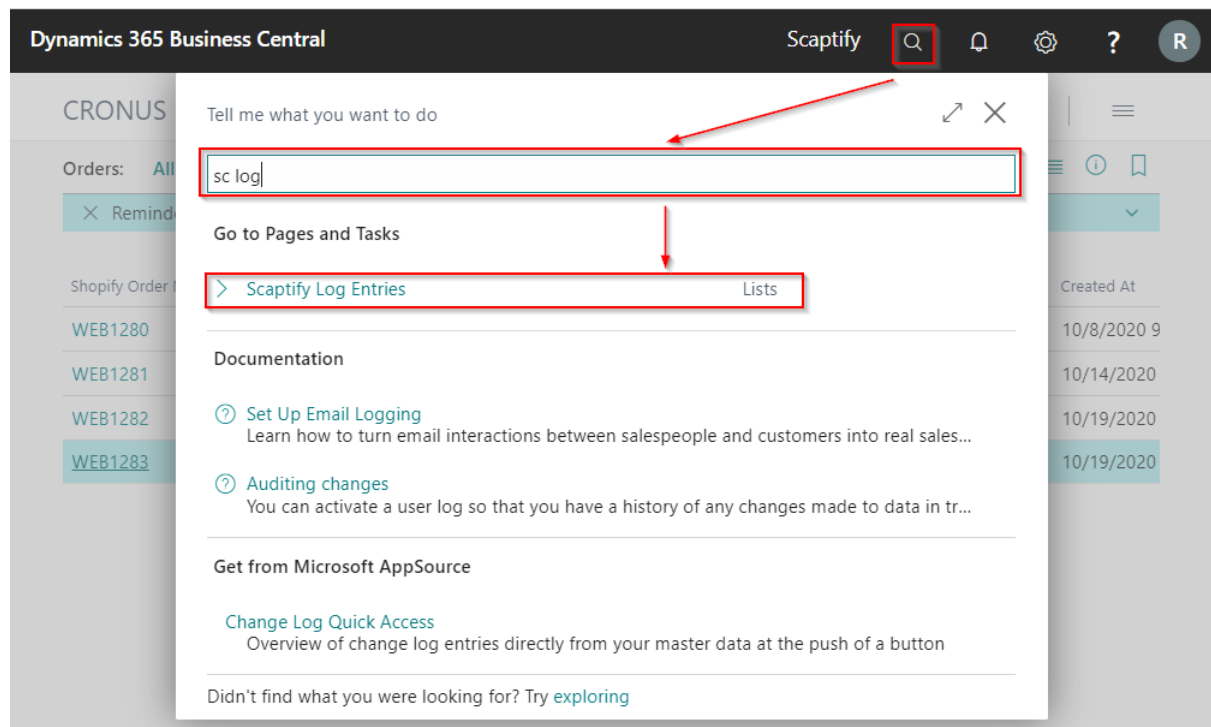
## 11. Troubleshooting

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:







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 🔍 ☰

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

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