Scaptify

Scaptify Shopify Connector User Guide

VERSION 1.0 | 27-3-2019

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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. Scaptify Shopify Connector Setup

2.1 Shopify

2.1.1 Create Shopify Account

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

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

2.1.2 Configure Shopify Account

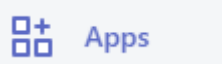
2.1.2.1 Create API credentials

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

Follow the steps below to create the credentials:

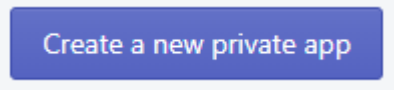
- Log in to the Shopify Admin page of your store
  e.g.: https://<storename>.myshopify.com/admin

- In the menu on the left, click “Apps”

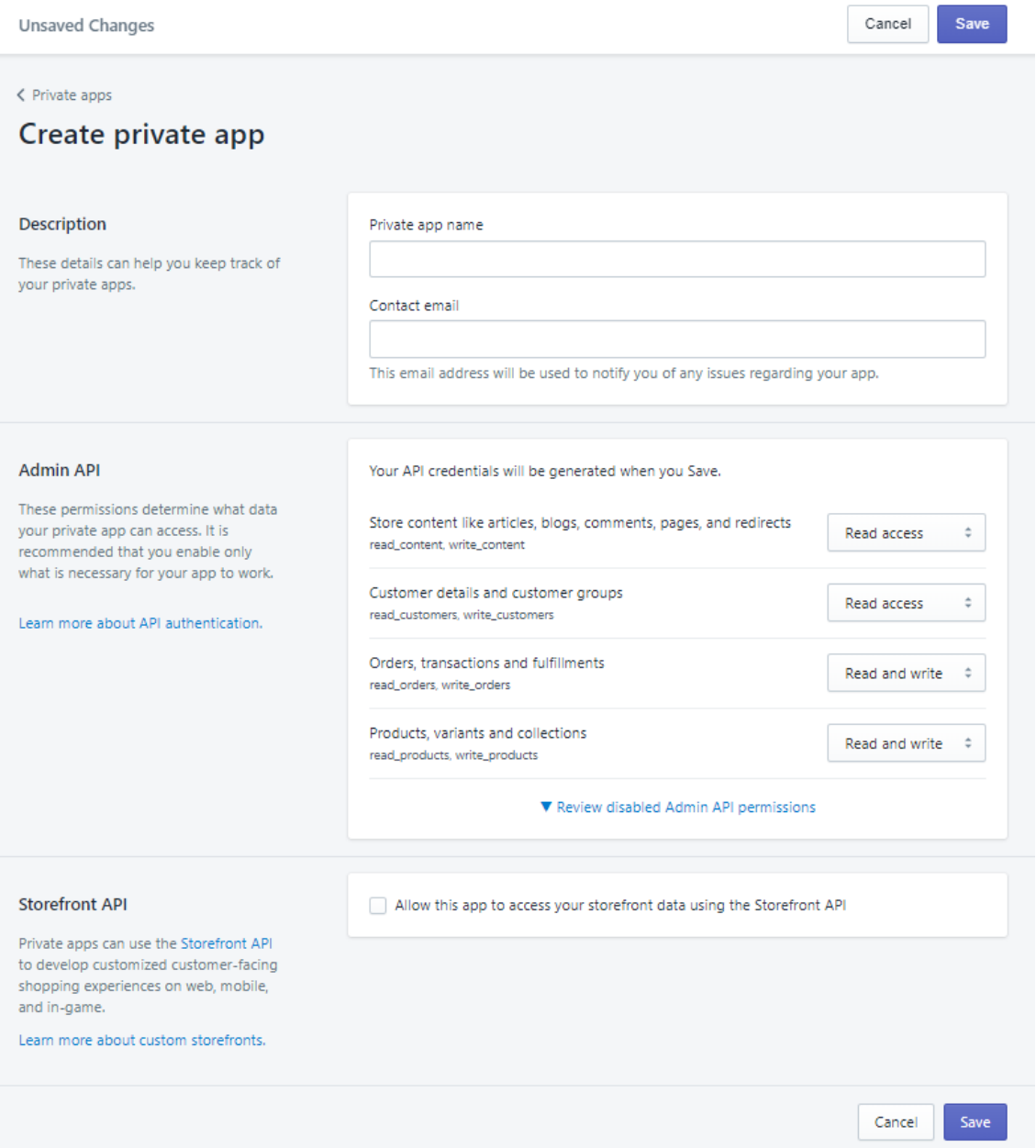
  

- In the middle below, click “Manage private apps"

- Click “Create a new private app” in the top right corner

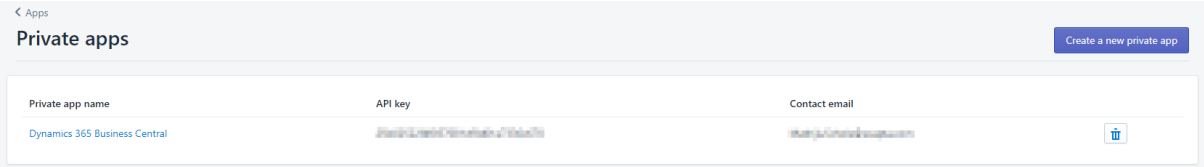


- Enter a title for the app and set the permissions as shown in the screenshot below.
  When finished, click “Save” in right corner at the bottom.



- When you return to the overview of the Private apps, the API Key and Contact email will be shown.
  This information will be used later on in the setup of Microsoft Dynamics 365

Business Central.

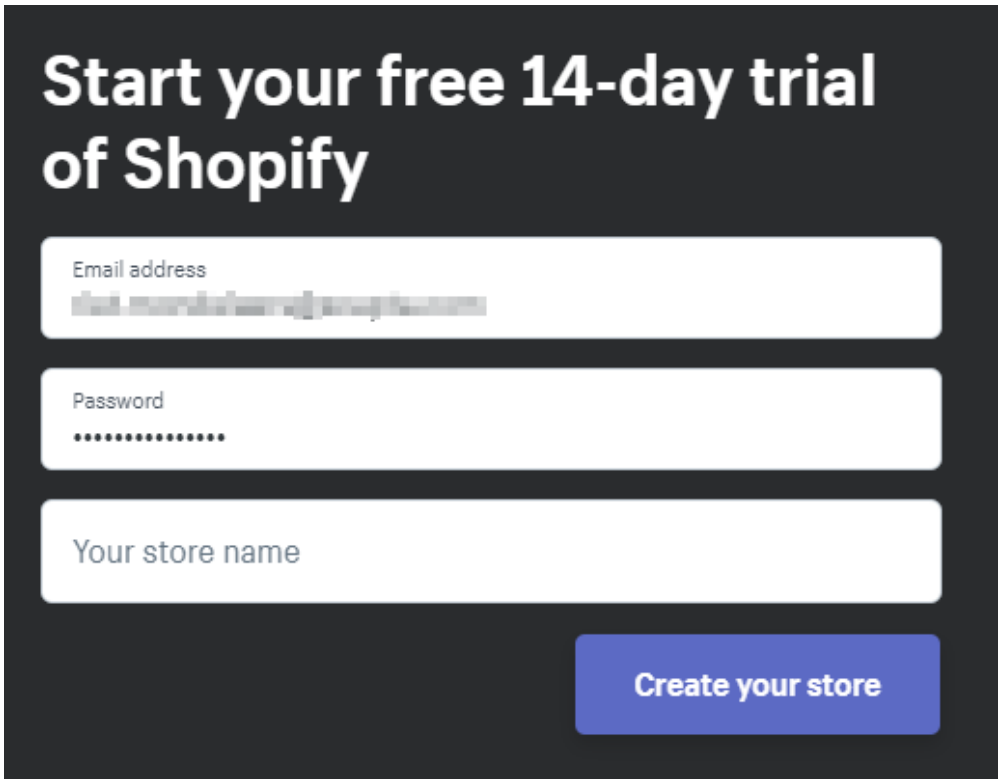


2.2 Shopify POS

2.2.1 Create Shopify POS Account

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

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



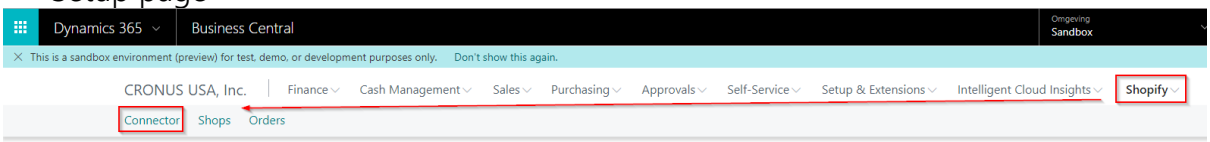
Remark: 'Your store name' is the name of the Shopify store you created.

2.3 Microsoft Dynamics 365 Business Central

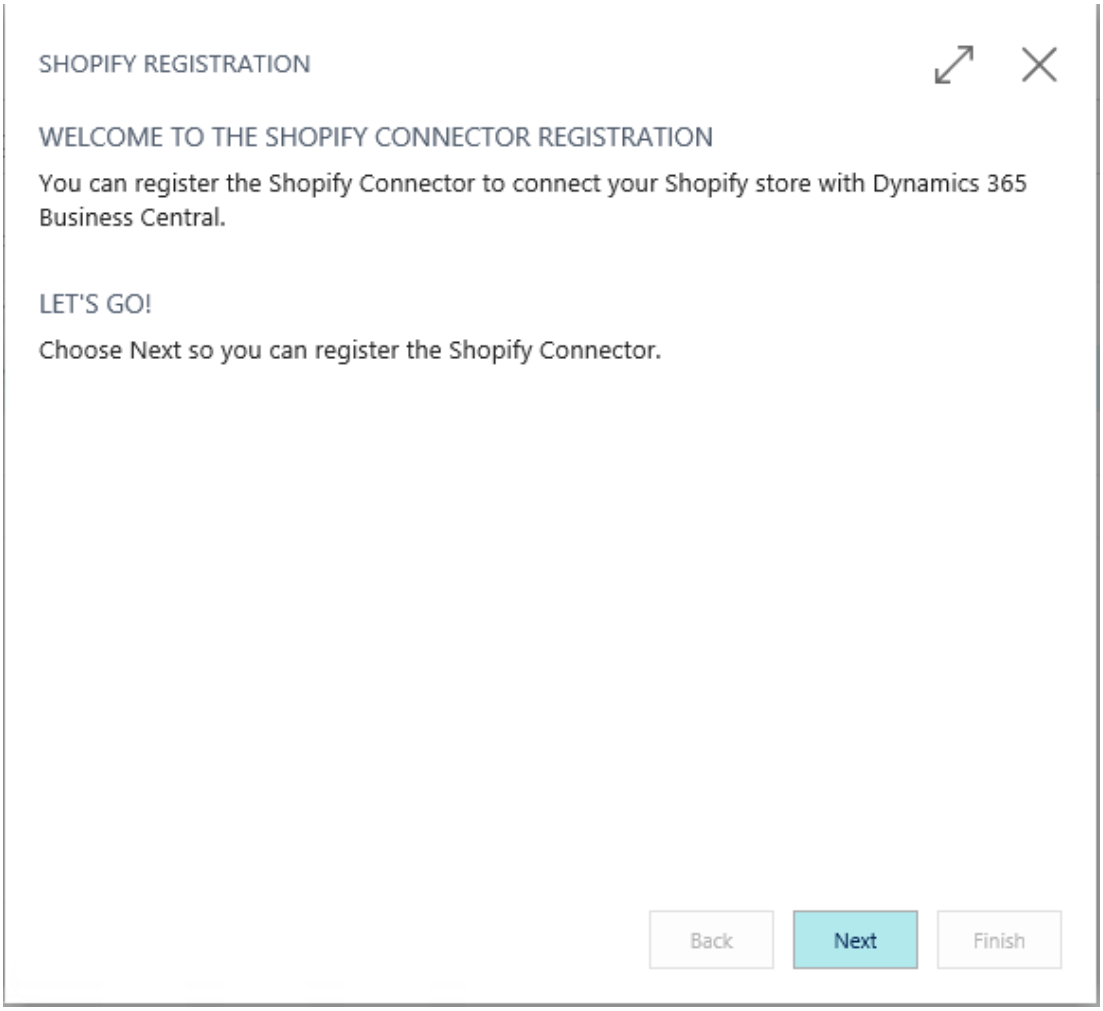
2.3.1 Scaptify Shopify Connector Setup

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

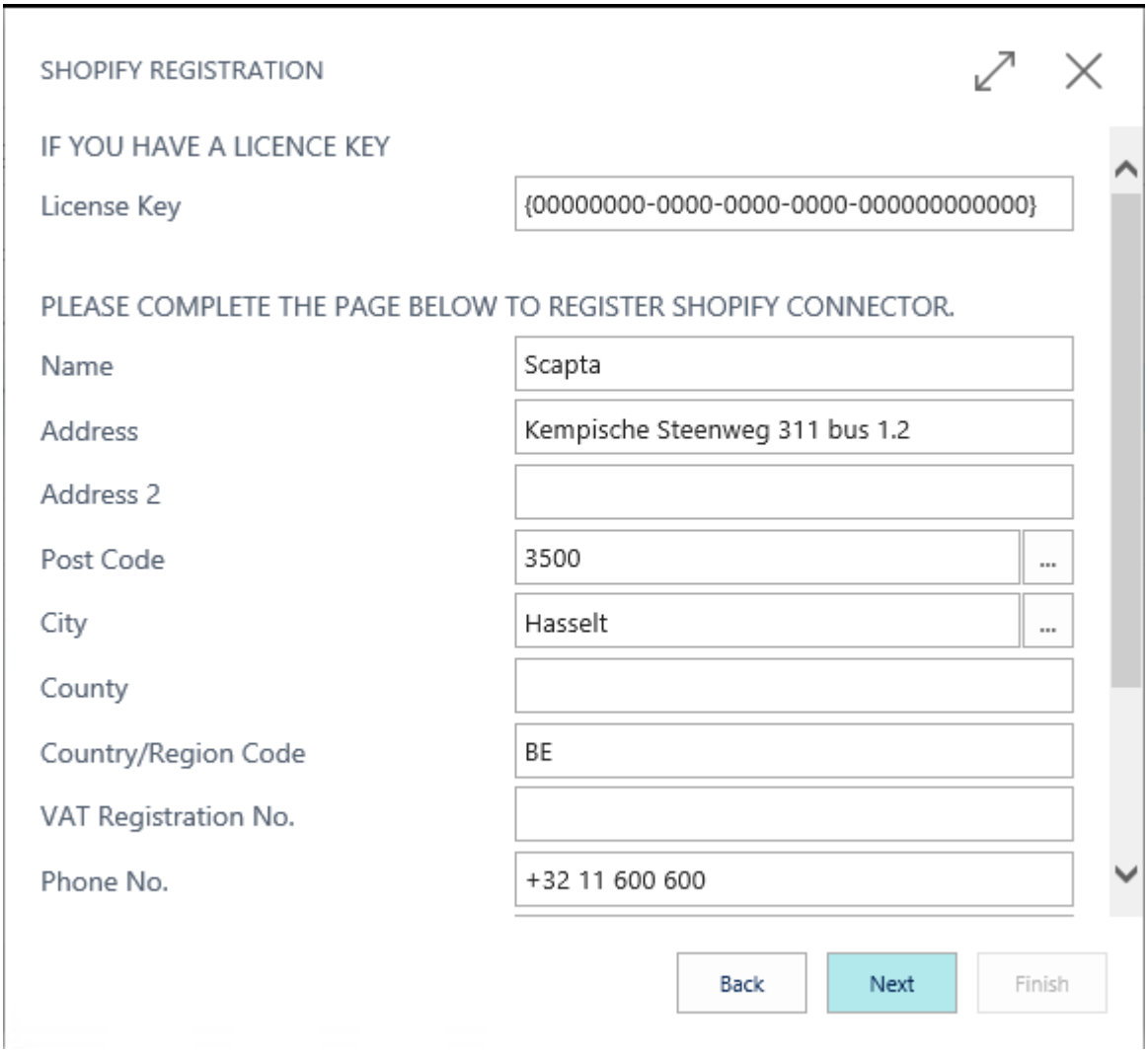
- In Microsoft Dynamics 365 Business Central go to the Shopify Connector Setup page



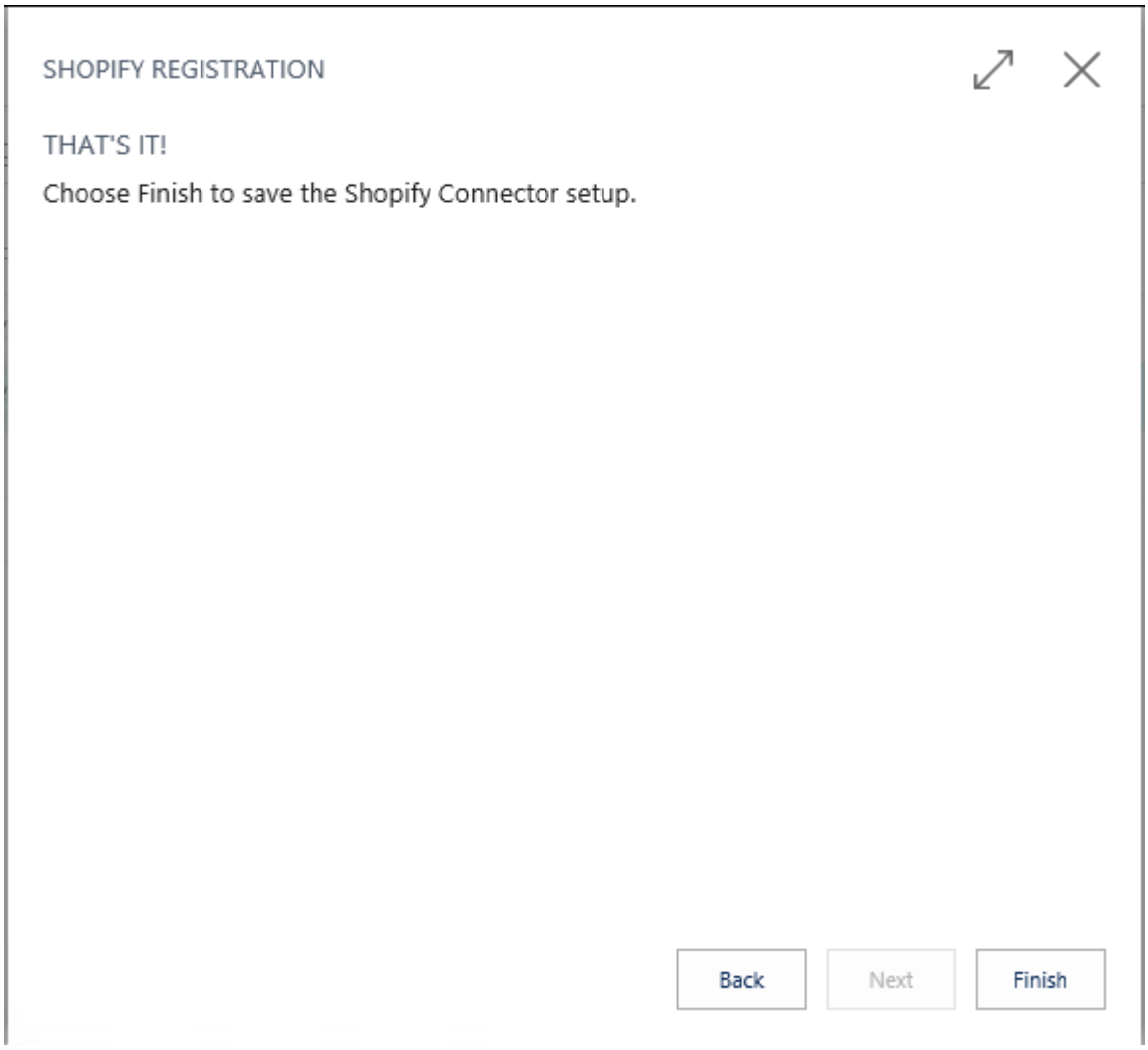
The setup wizard will start :



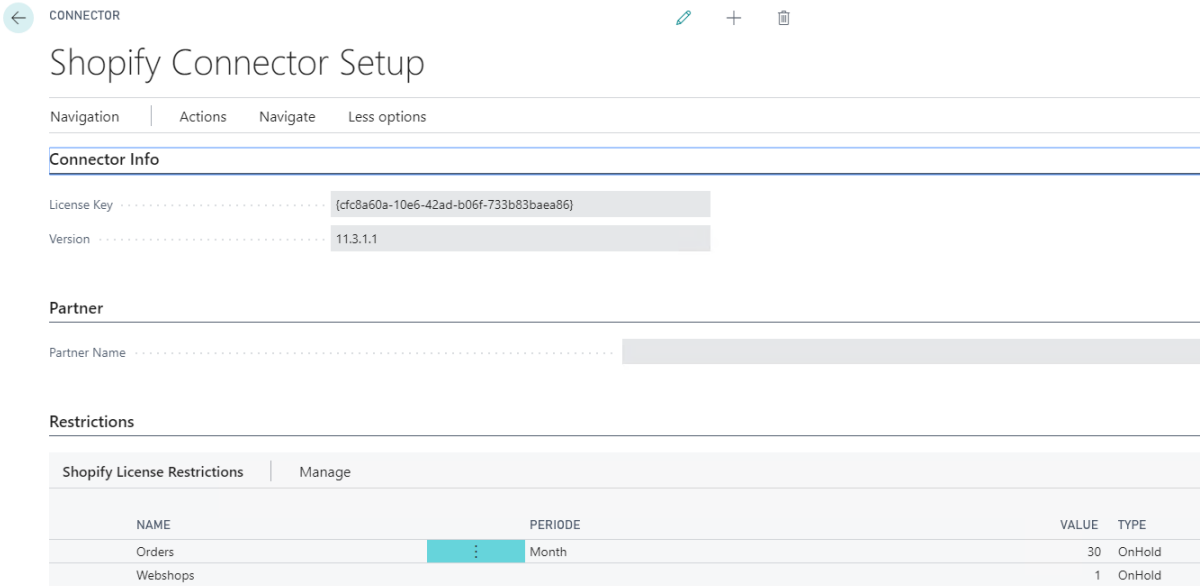
- Click Next on the welcome page.
- Complete your company information and click next.



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



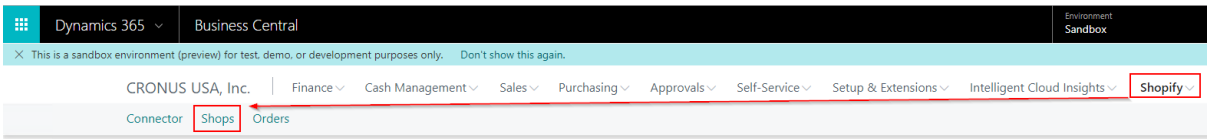
- You can consult your license key and restrictions in the Shopify Connector Setup page.



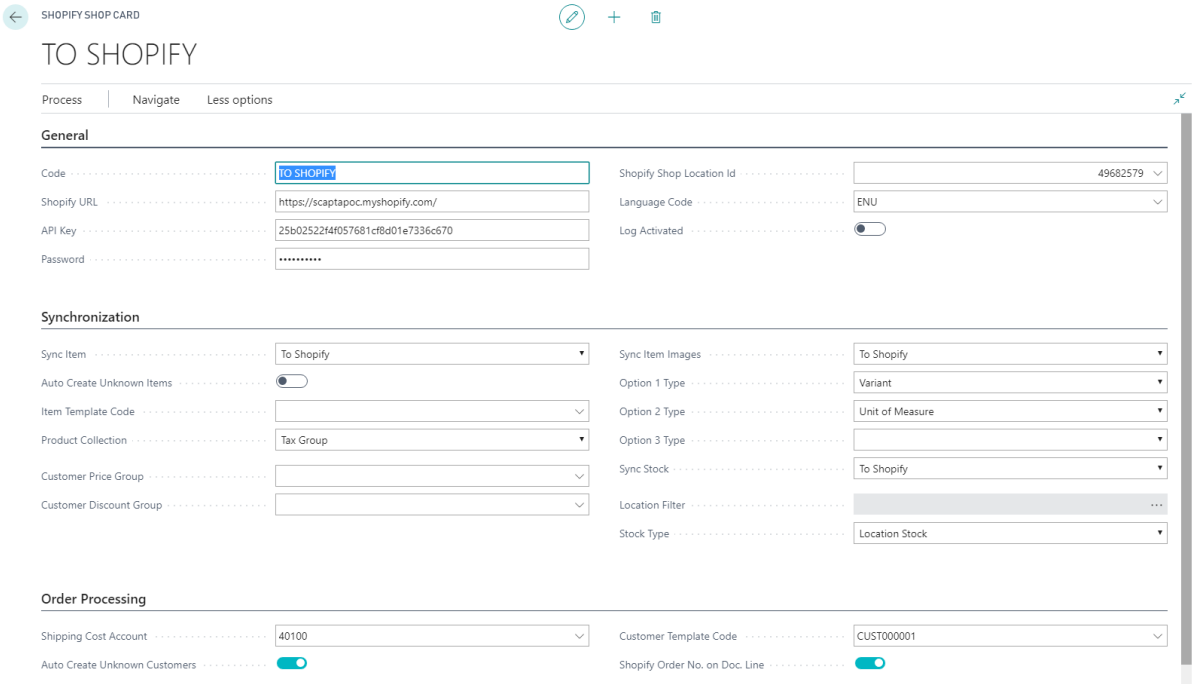
2.3.2 Setup Shops

From the Scaptify 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'.



- Enter a Code for your Shopify Shop.
- Enter the URL of your Shopify Store, together with the API Key and the password.
  See Create API credentials.
- Select your Shopify Shop location and the language code.



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.

- 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

- Select the default Customer price group and customer discount group you want to use for Shopify customers.

- Select if you use tax groups or VAT product posting groups when you sync items to Shopify.
  Restrictions:
  - The VAT/Tax setup must be the same in Shopify and NAV.

    - 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.

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

- There are options available how you want to offer your items on the Shopify webshop.
    - Different variants
    - Different units of measure

- Define how you want to synch your stock
    - From Dynamics 365 Business Central to Shopify
        - Select the locations you want to synch the stock from.
        - Select if you want to sync:
            - The location stock
            - The vendor stock (next version)
            - The location and the vendor stock (next version)
    - From Shopify to Dynamics 365 Business Central

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

- Enter the 'Shipping cost Account'.

- 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.

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

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.

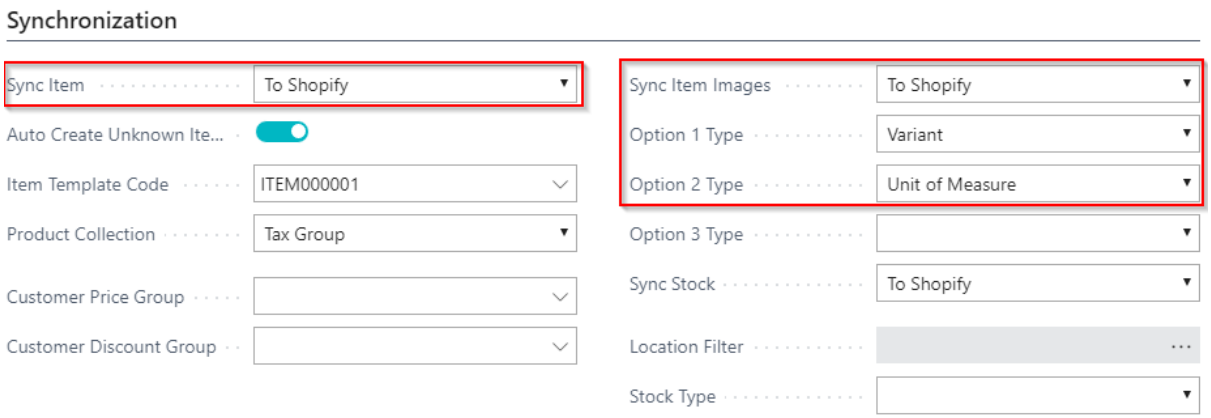
3. Item Synchronization

3.1 Synchronize item to Shopify

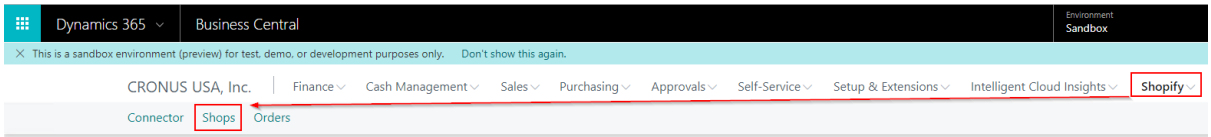
3.1.1 Setup Items to synchronize

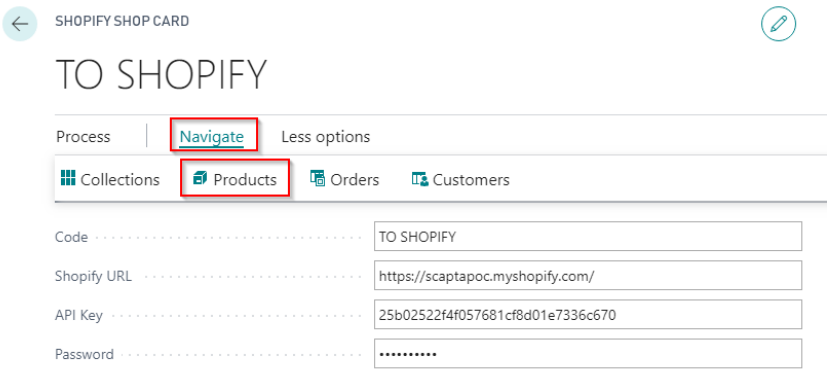
On the tab 'Synchronization' of the Shopify Shop Card, you can enter to sync the items (item data, item attributes, extended text, item tags…) and item images to Shopify.

If you want to sync your variants, you choose this as 'Option Type'.



When you navigate to 'Products' on you Shopify Shop Card, you can add the items from Dynamics 365 Business Central you want to synchronize to Shopify.




SHOPIFY SHOP CARD
TO SHOPIFY
Process
Navigate
Less options
Collections
Products
Orders
Customers
Code
TO SHOPIFY
Shopify URL
https://scaptapoc.myshopify.com/
API Key
25b02522f4f057681cf8d01e7336c670
Password
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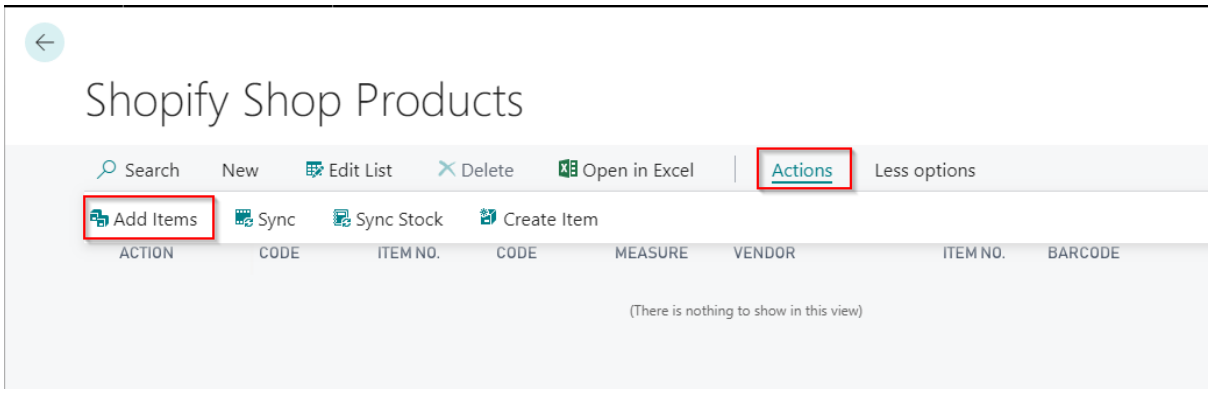
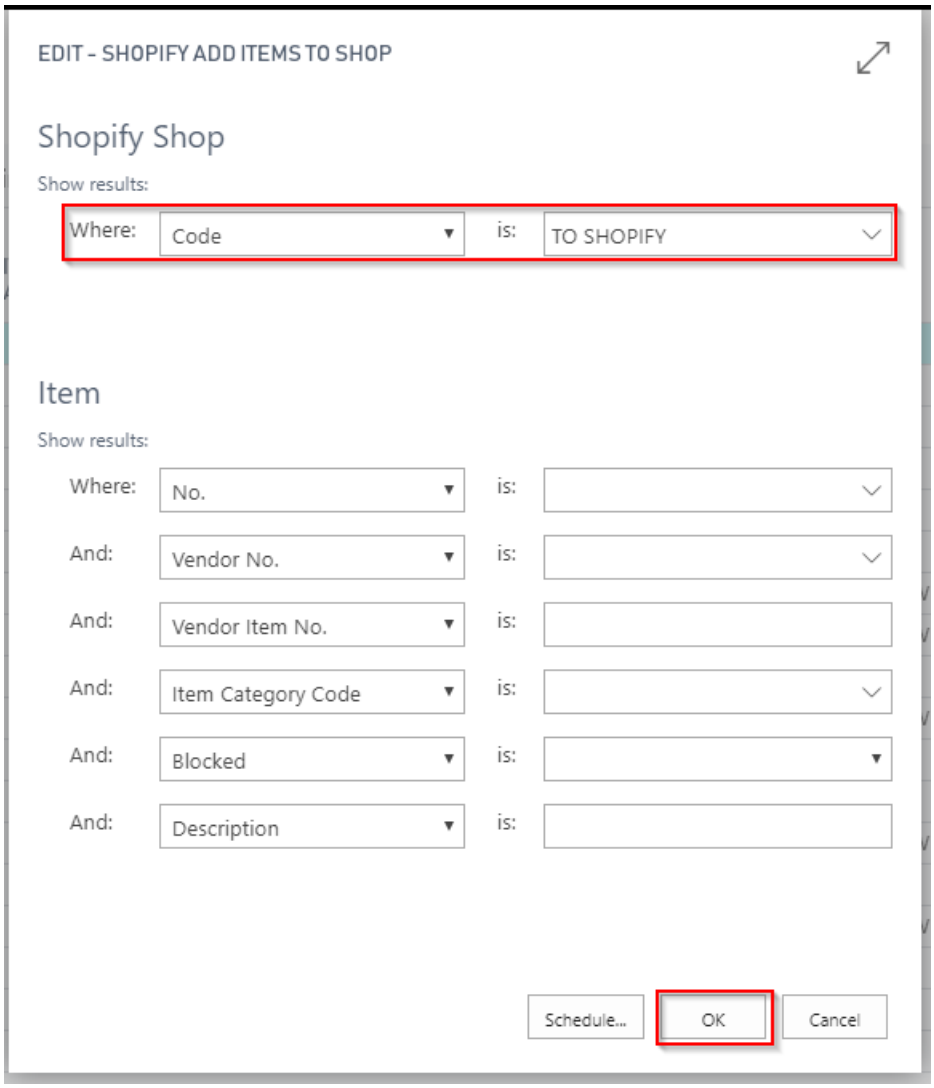
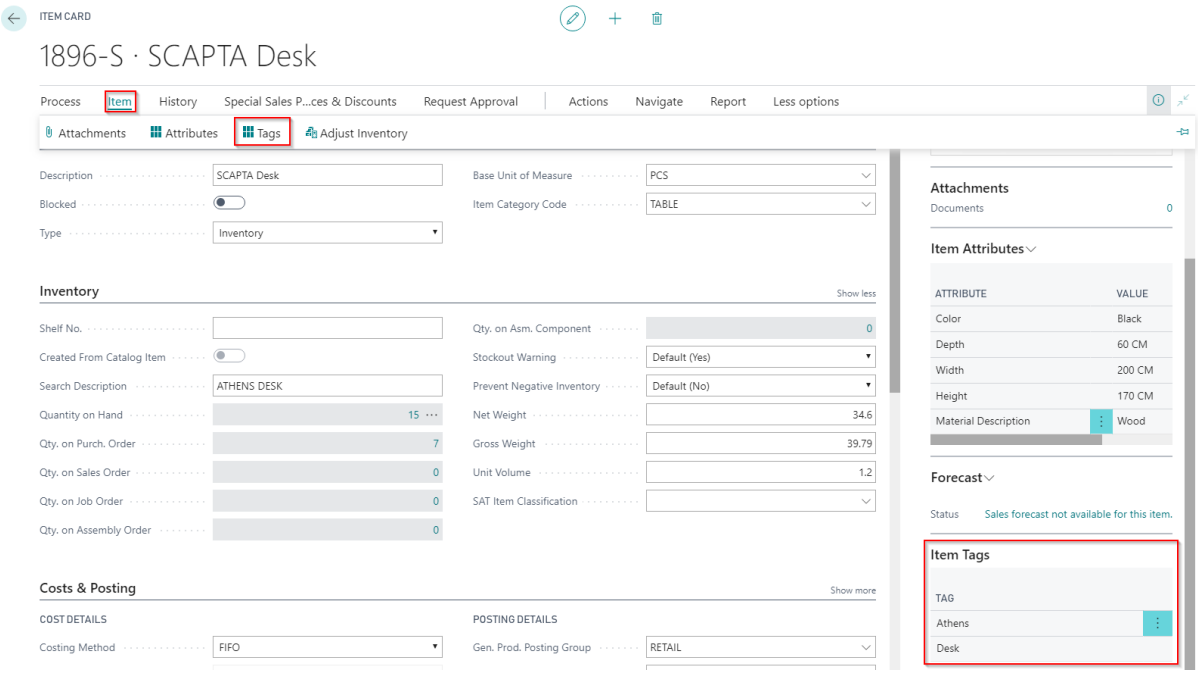

Shopify Shop Products
Search
New
Edit List
Delete
Open in Excel
Actions
Less options
Add Items
Sync
Sync Stock
Create Item
ACTION
CODE
ITEM NO.
CODE
MEASURE
VENDOR
ITEM NO.
BARCODE
(There is nothing to show in this view)



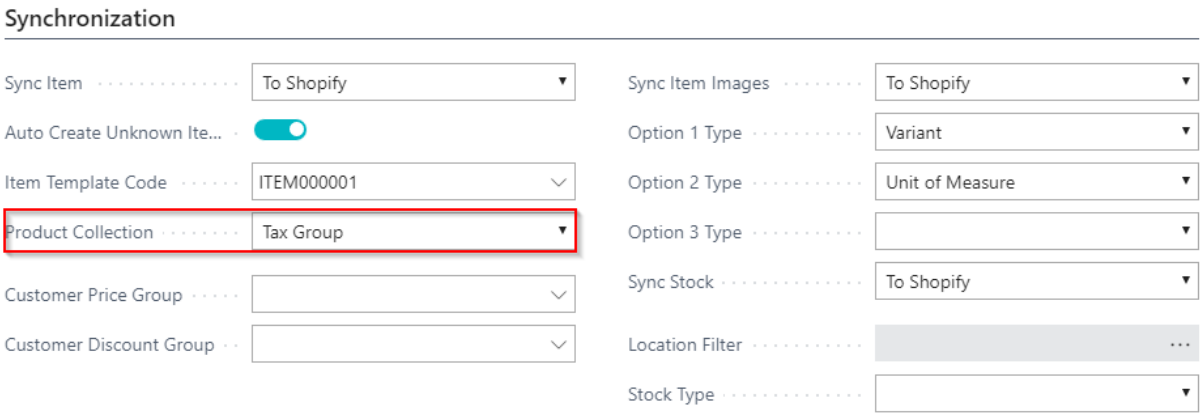
You can also specify if the item will be visible in the POS. Check the column 'Visible in POS' in the list with Shopify Shop Products.

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

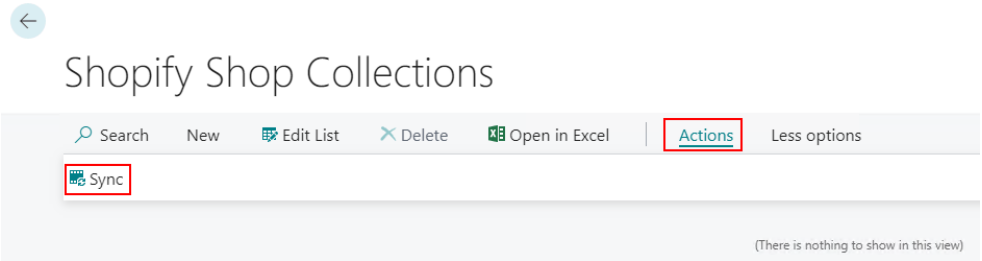


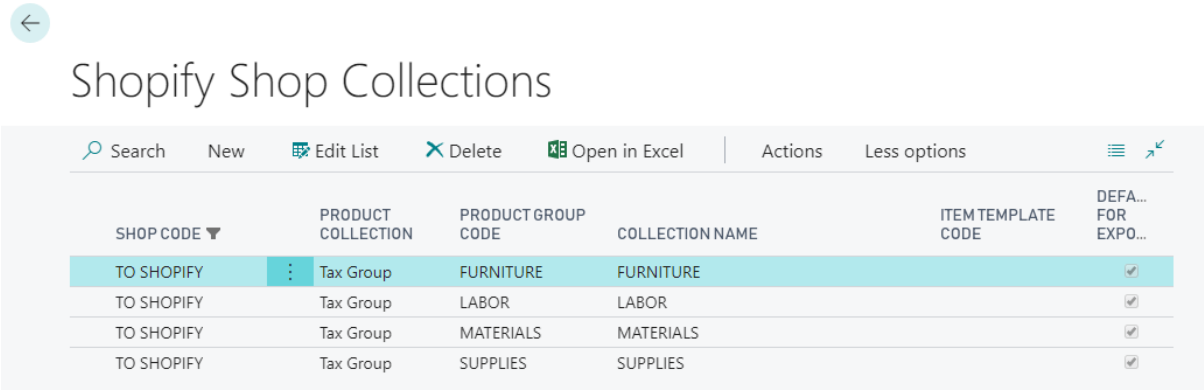
3.1.2 Synchronize collections

On the tab 'Synchronization' of the Shopify Shop Card, you can enter to sync your product collections based on your tax group or your VAT Product Posting group.



Navigate to 'Collections' on your Shopify Shop Card and execute the sync function to collect your collections and fill the collection name you want to use in Shopify.

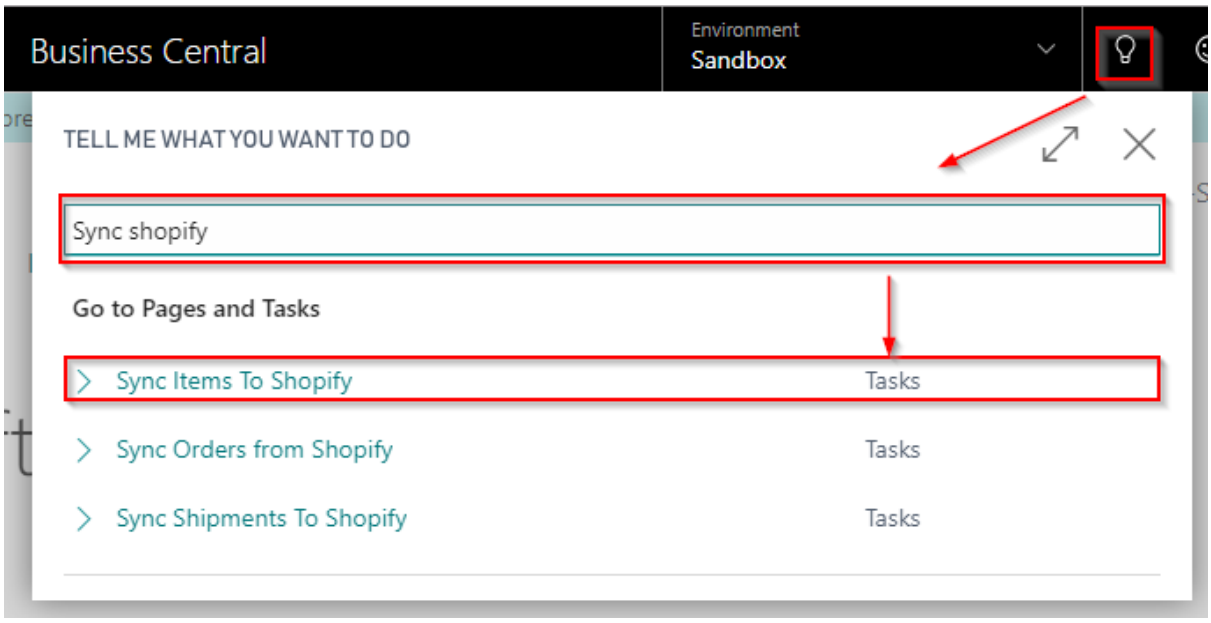




3.1.3 Execute Item Synchronization

3.1.3.1 By batch task

In the Role center, use the search function to find the task “Sync Items To Shopify” :

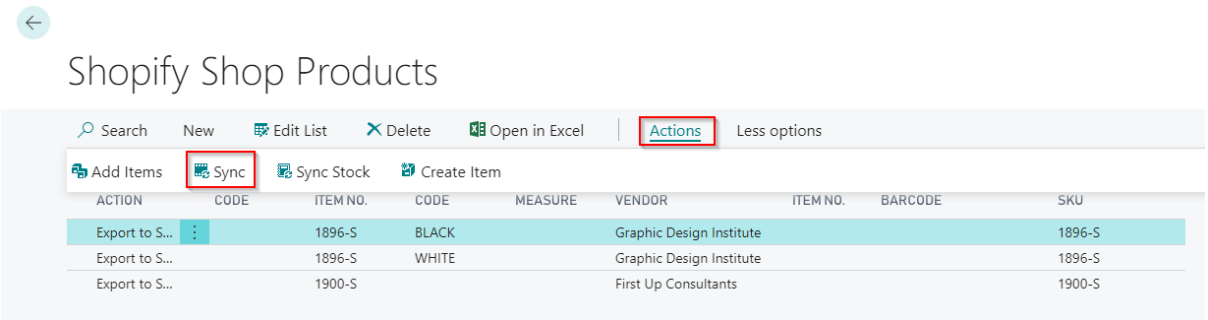


When executing this task, the configured items are synchronized to your Shopify account.

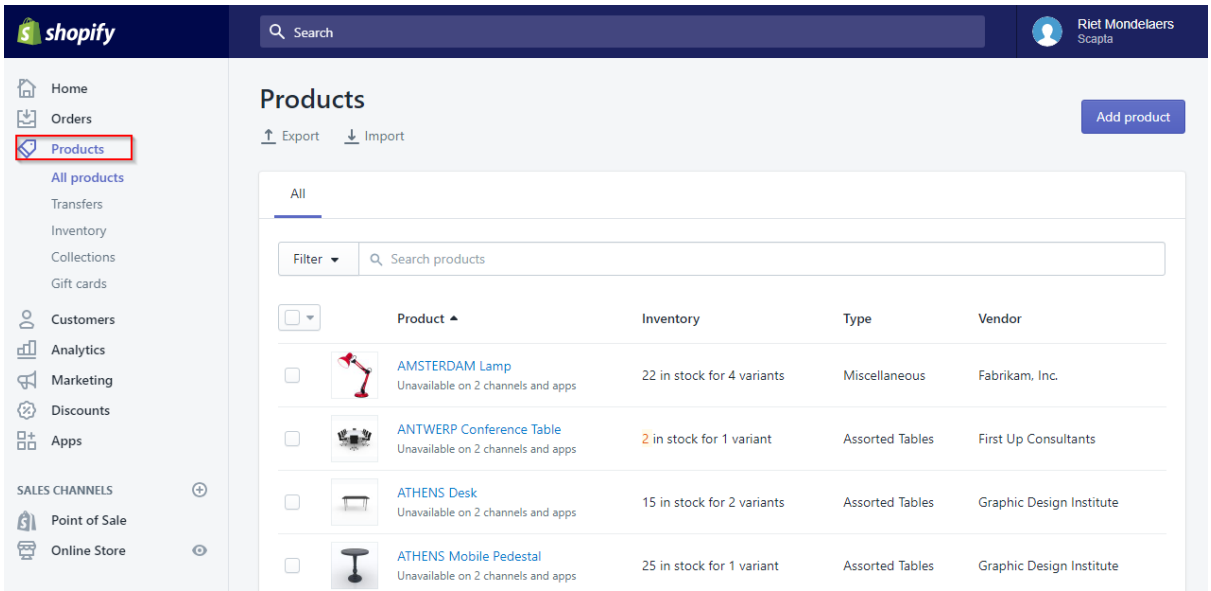
You can verify this on the admin page of your Shopify account.

3.1.3.2 By action 'Sync'

When you navigate to 'Products' on you Shopify Shop Card, you can execute the function 'Sync' to synchronize the items to your Shopify Account.



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


shopify
Search
Riet Mondelaers
Scapta
Home
Orders
Products
All products
Transfers
Inventory
Collections
Gift cards
Customers
Analytics
Marketing
Discounts
Apps
SALES CHANNELS
Point of Sale
Online Store
Products
Export
Import
Add product
All
Filter
Search products
Product
Inventory
Type
Vendor
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

Scaptify

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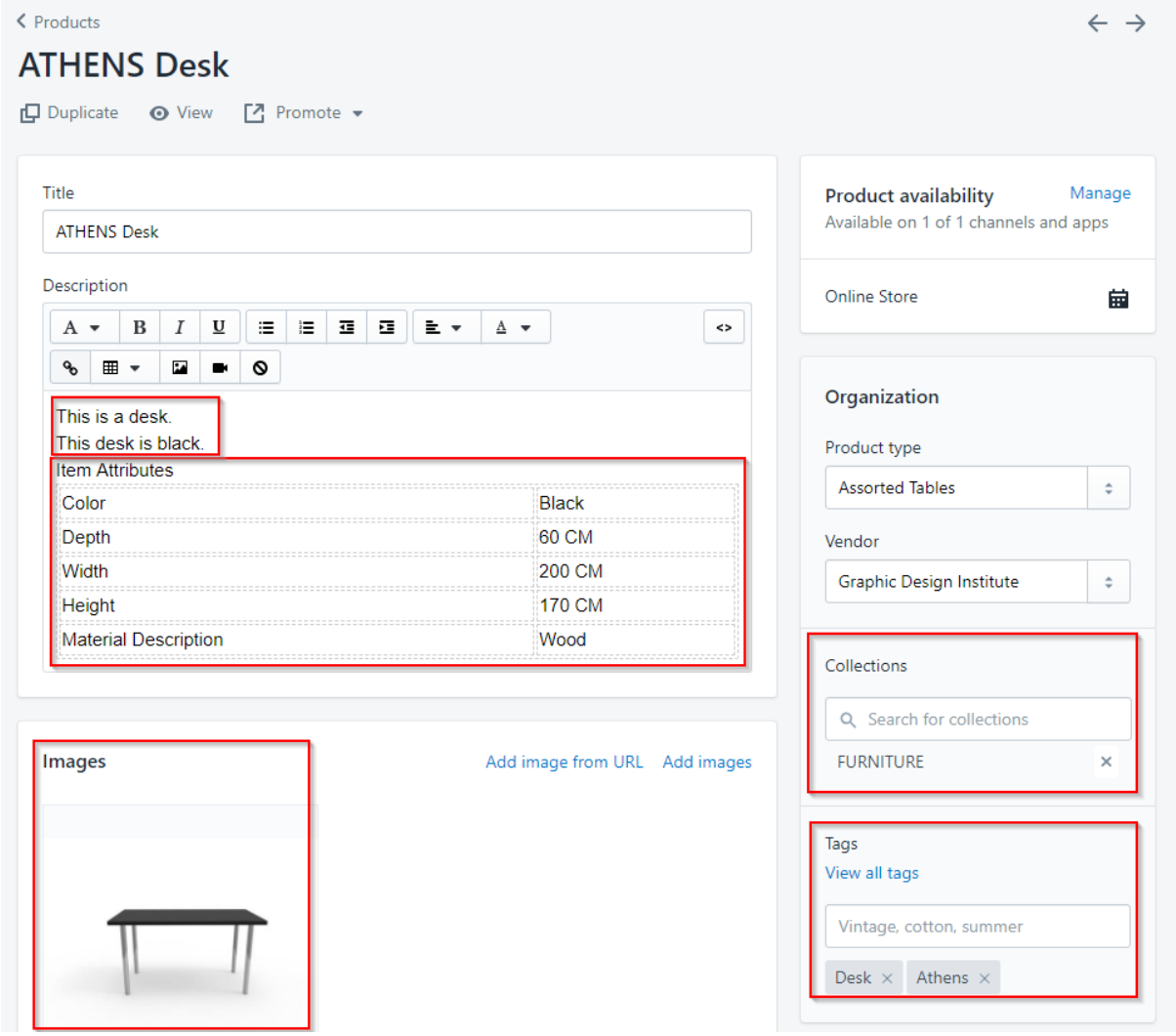
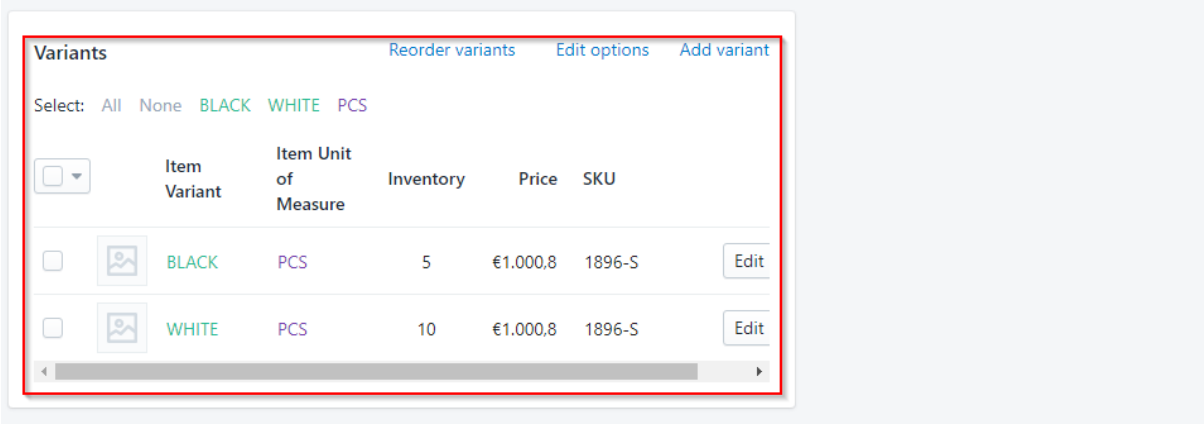


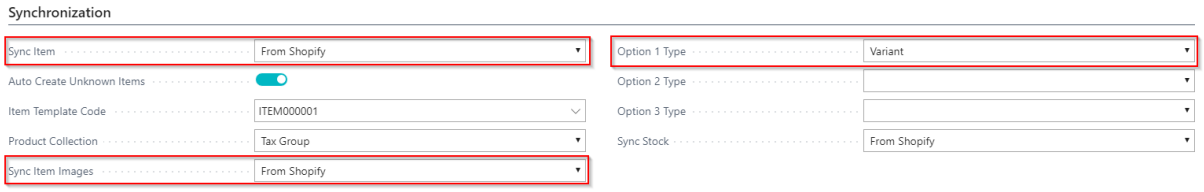


3.2 Synchronize item from Shopify to Dynamics 365 Business Central

3.2.1 Setup Items to synchronize

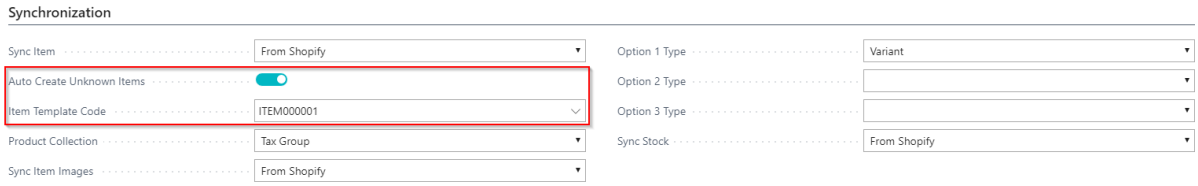
On the tab 'Synchronization' of the Shopify Shop Card, you can enter to sync the items from Shopify. The synchronization of the item images to Dynamics 365 Business Central is provided in the next version.

If you want to sync your variants, you choose this as 'Option Type'.



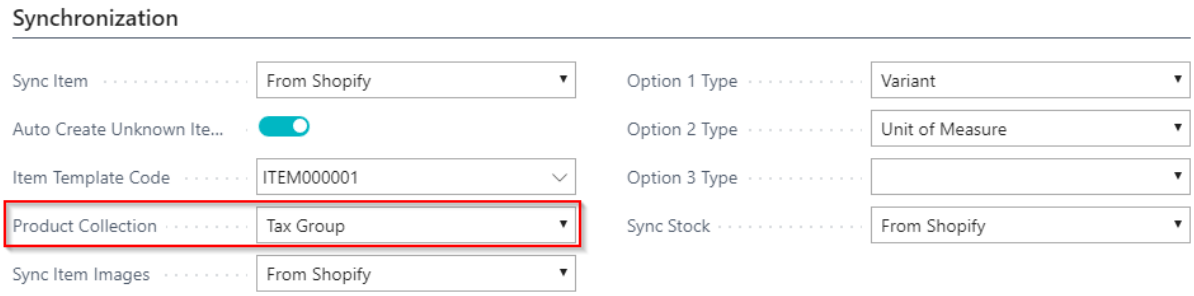
3.2.2 Setup to automatically create unknown items

On the tab '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.

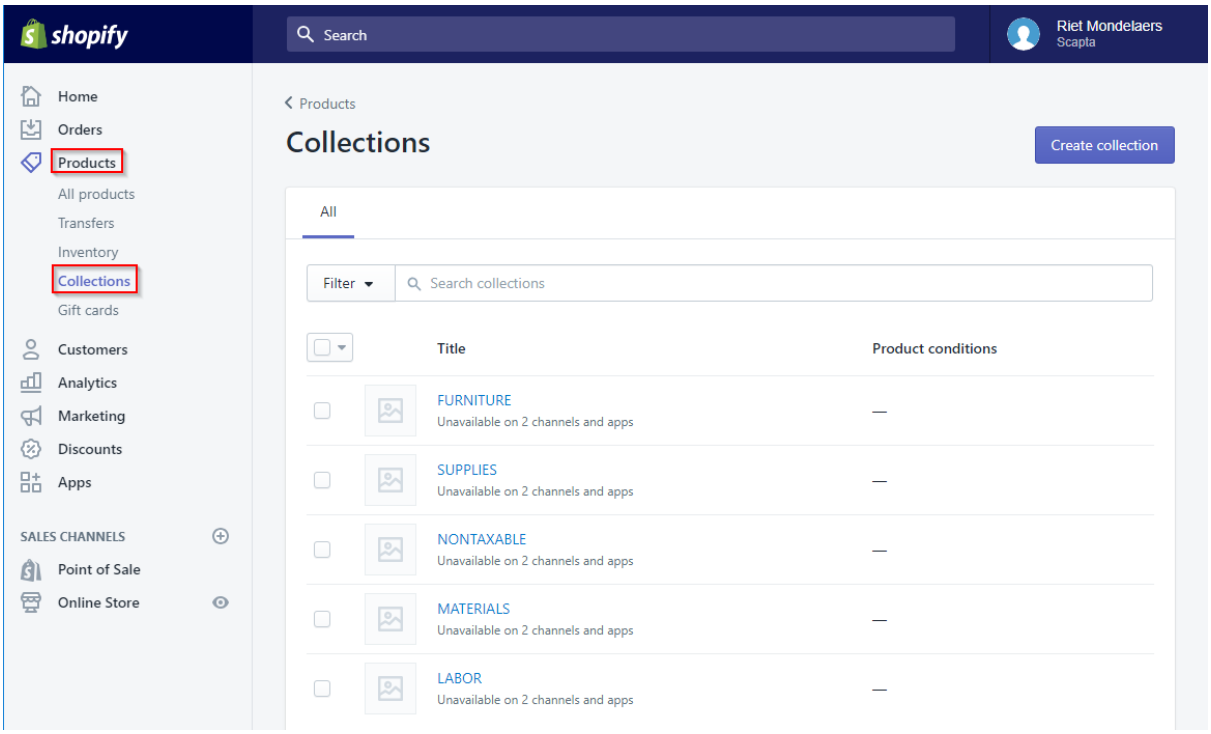


3.2.3 Synchronize collections

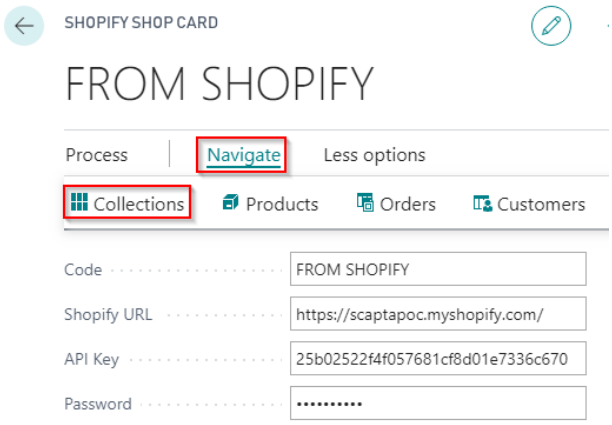
On the tab 'Synchronization' of the Shopify Shop Card, you can enter to sync the collections from Shopify.

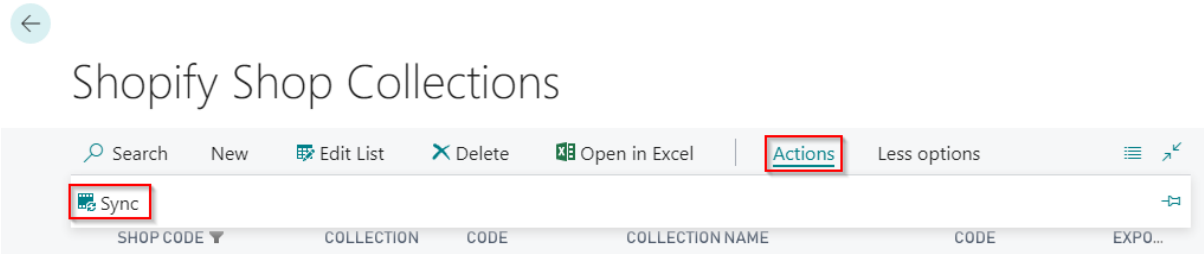


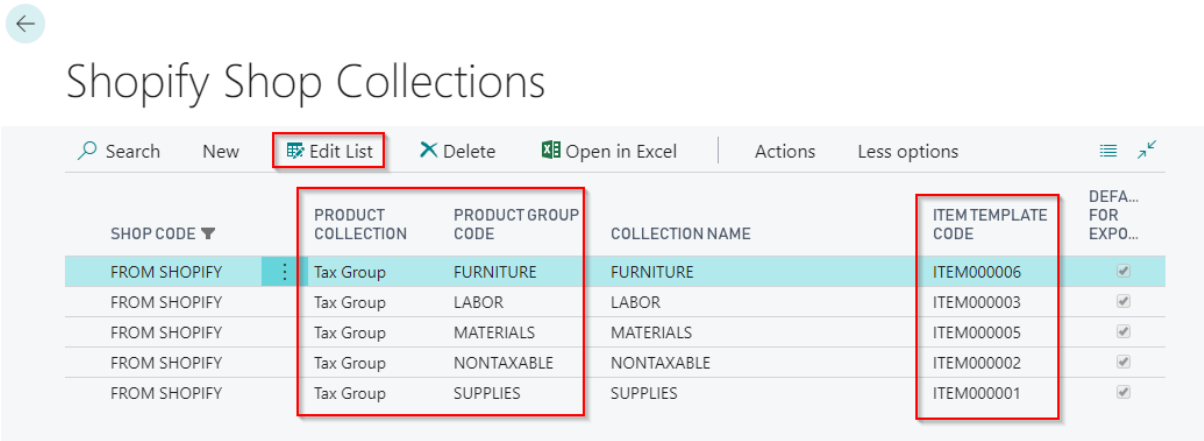
The collections in Shopify:



In Dynamics 365 Business Central, execute the function 'Sync' to synch the collections to Dynamics 365 Business Central. Fill the product collection and the product group code. It is also possible to define an item template code for each collection.

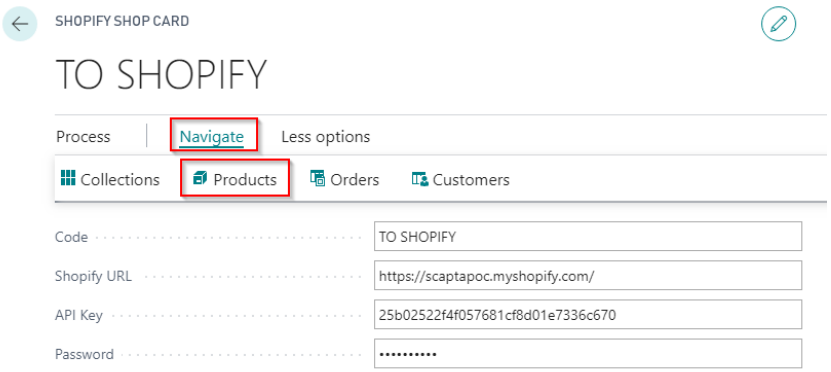


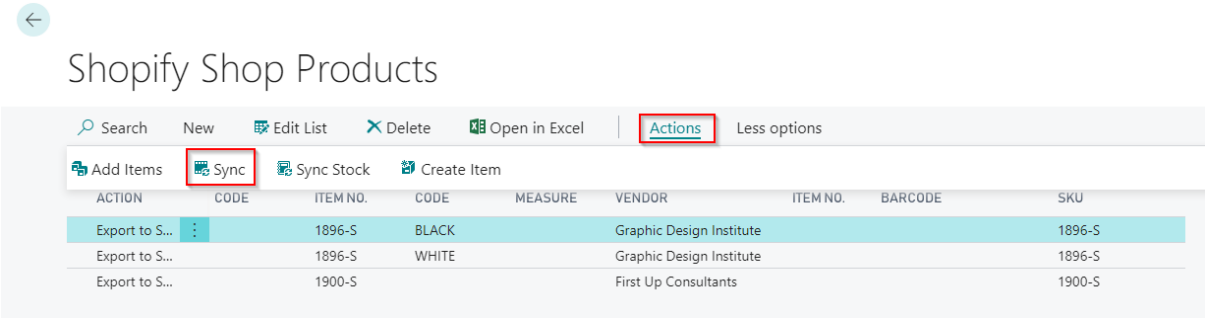




3.2.4 Execute Item Synchronization

When you navigate to 'Products' on you Shopify Shop Card, you can execute the function 'Sync' to synchronize the items from your Shopify Account.





You can verify this on the Shopify shop products page in Dynamics 365 Business Central.

4. Stock Synchronization

4.1 Synchronize stock to Shopify

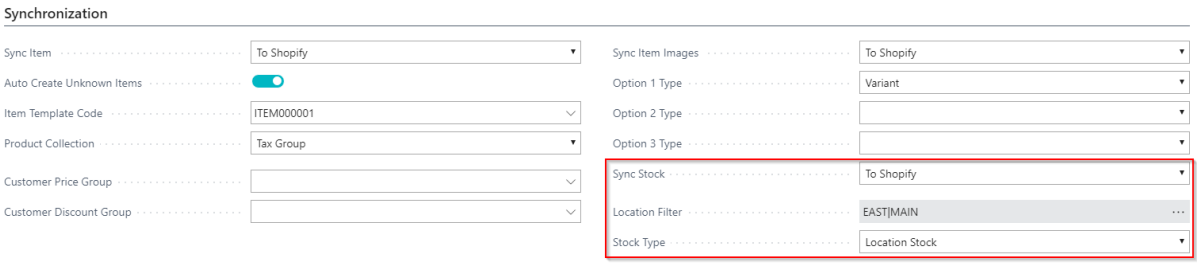
4.1.1 Setup stock to synchronize

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

Choose the stock type you want to synchronize:

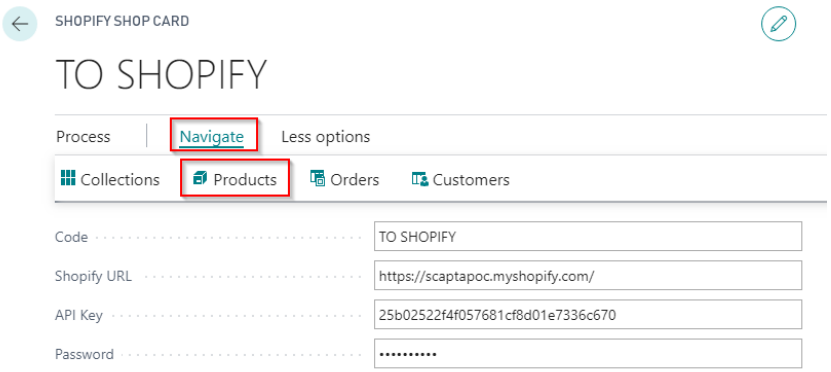
- Location stock
- Vendor stock (next version)
- Location + vendor stock (next version)

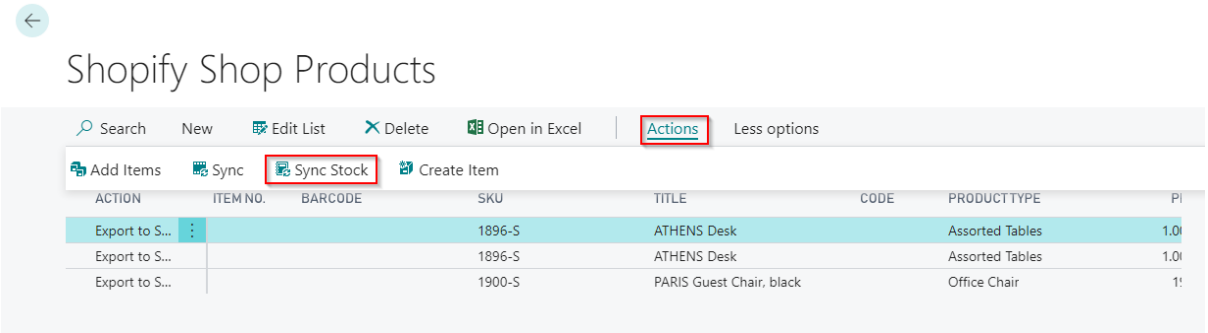
When you want to synchronize the location stock, you should define the locations you want to synchronize.



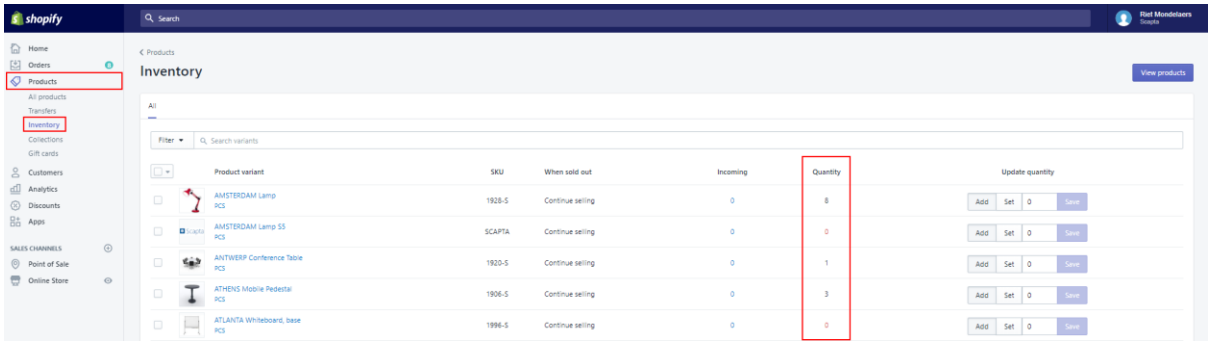
4.1.2 Execute stock synchronization

When you navigate to 'Products' on you Shopify Shop Card, you can execute the function 'Sync stock' to synchronize the stock to your Shopify Account.





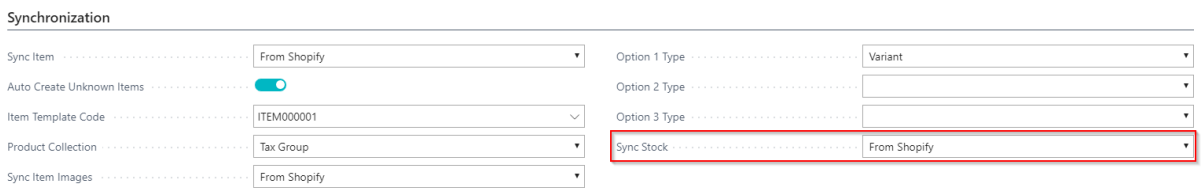
You can verify this on the admin page of your Shopify account.



4.2 Synchronize stock from Shopify to Dynamics 365 Business Central

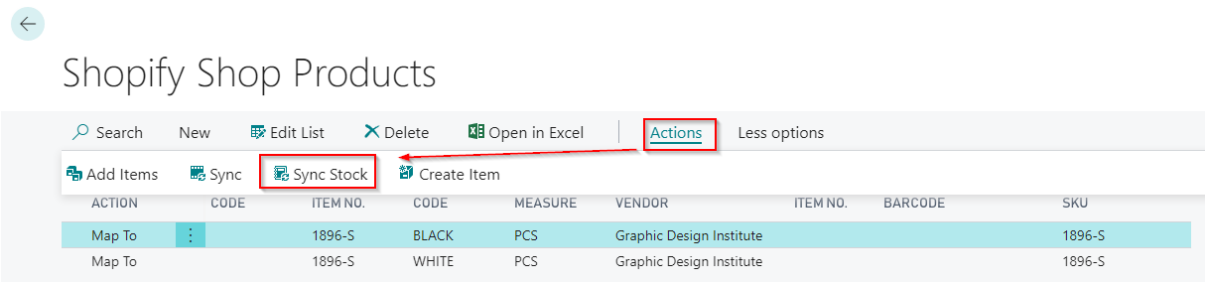
4.2.1 Setup stock to synchronize

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



4.2.2 Execute stock synchronization

When you navigate to 'Products' on you Shopify Shop Card, you can execute the function 'Sync stock' to synchronize the stock from your Shopify Account.



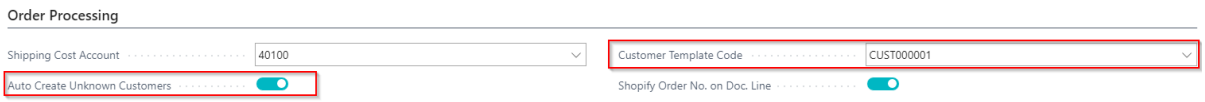
You can verify this on the Shopify shop products page in Dynamics 365 Business Central.

5. Order Processing

5.1 Setup automatically create unknown customers

5.1.1 General customer template

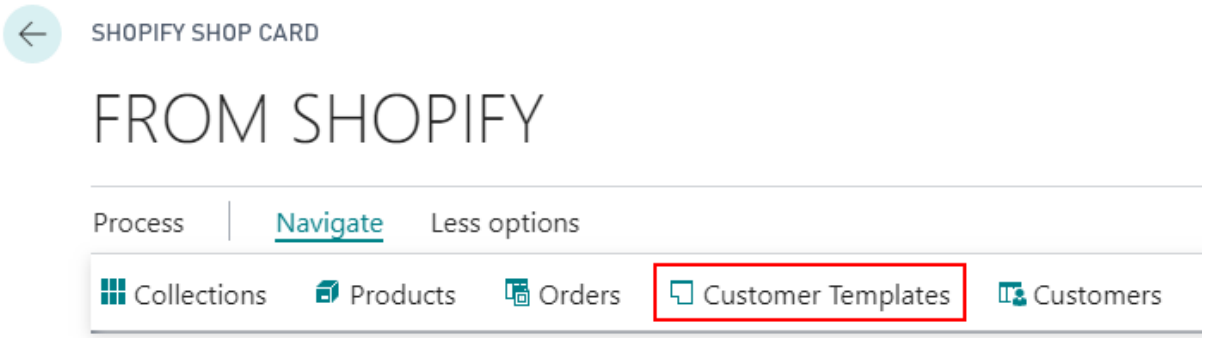
On the tab 'Order processing' of the Shopify Shop Card, you can enter to automatically create unknown customers in Dynamics 365 Business Central based on a customer template.

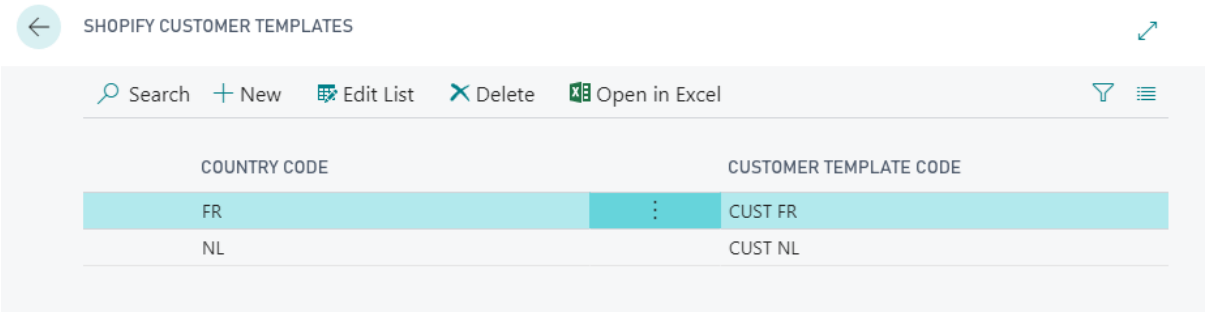


5.1.2 Customer template per country

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.

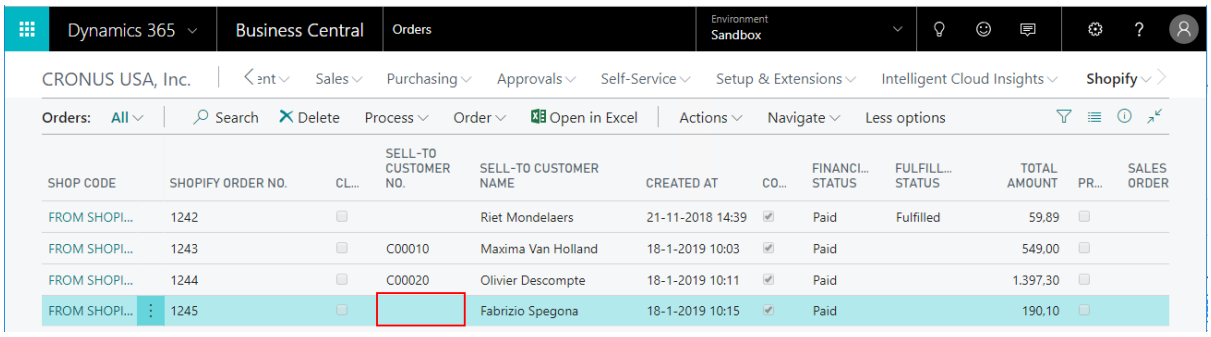


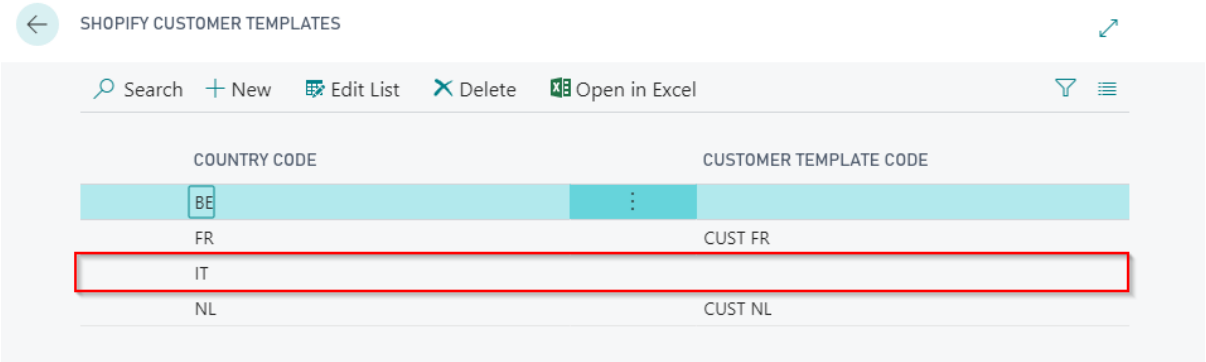


The country codes are ISO 3166-1 alpha-2 country codes. For more information: https://help.shopify.com/en/api/custom-storefronts/storefront-api/reference/enum/countrycode

When a customers has a country code for which you have not defined a template, the customer has not been created. The sell-to customer in the Shopify orders stays empty. In the Shopify customer templates, the country code was added so you can define a template for this.

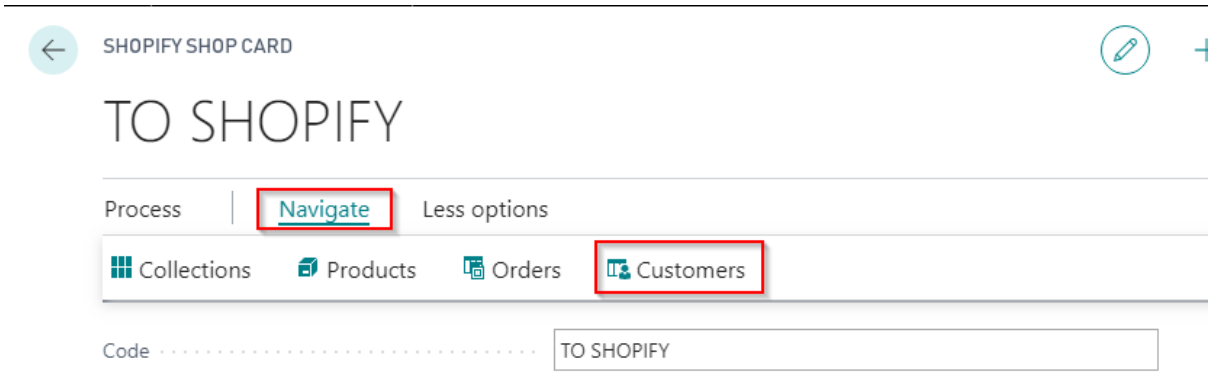
Remark: If you have not defined a country-specific customer template, but a general customer template in the Shopify Shop setup, the general template will be used to create the customer in Dynamics 365 Business Central.

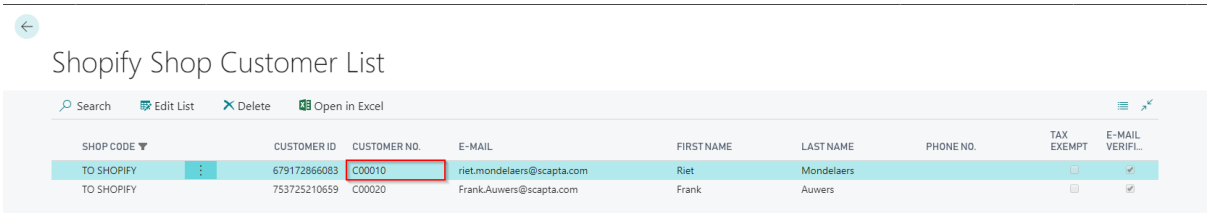




5.1.3 Verify customer creation

Verify that the new customer is created in Dynamics 365 Business Central.
In the Shopify Shop go to 'Customers' and verify the customer is added to the list and a customer number is linked.

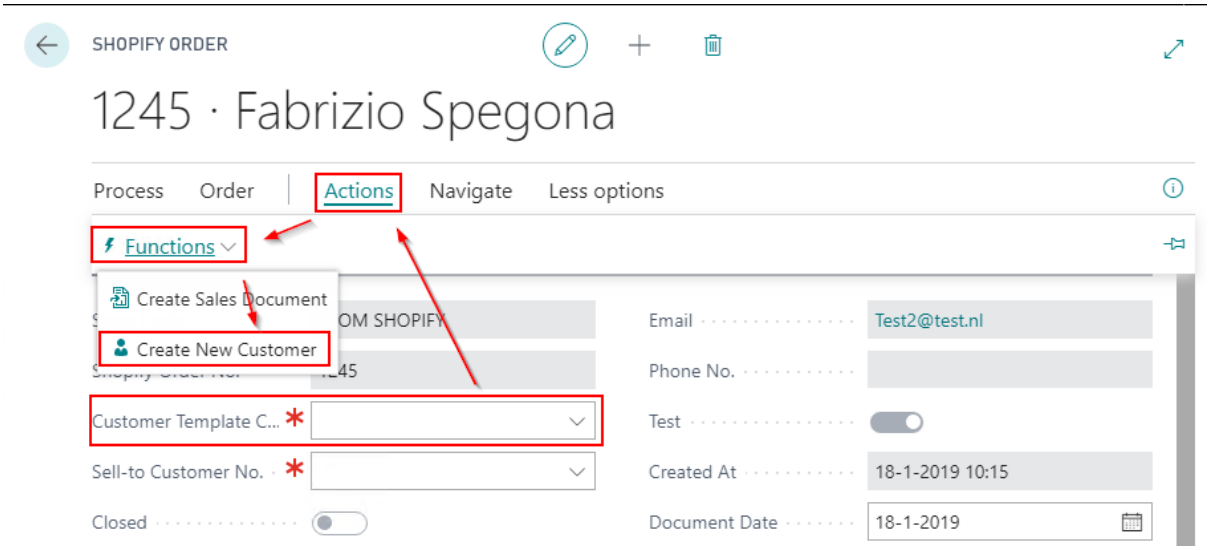




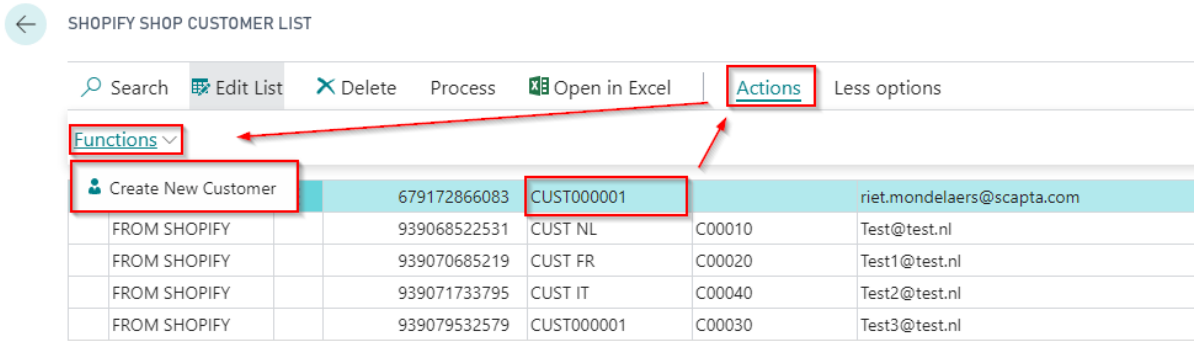
5.1.4 Manually create customers

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'.



In the Shopify Shop Customer List, you can select a template code and create the customer in Dynamics 365 Business Central with the function 'Create new customer'.

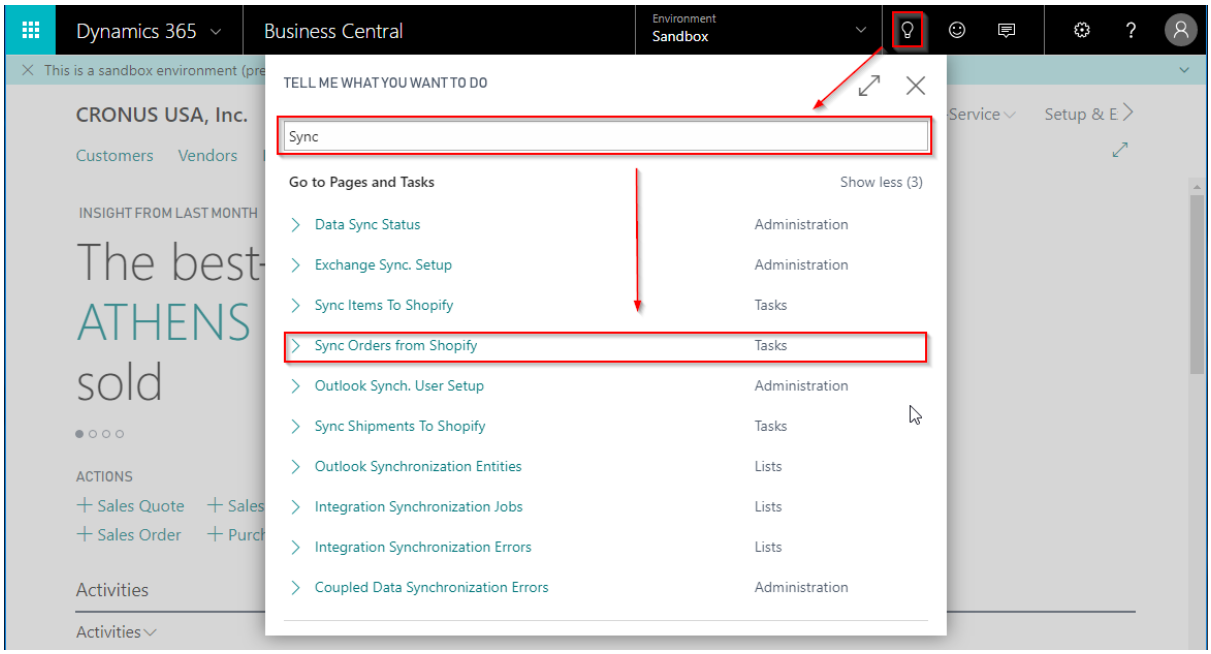


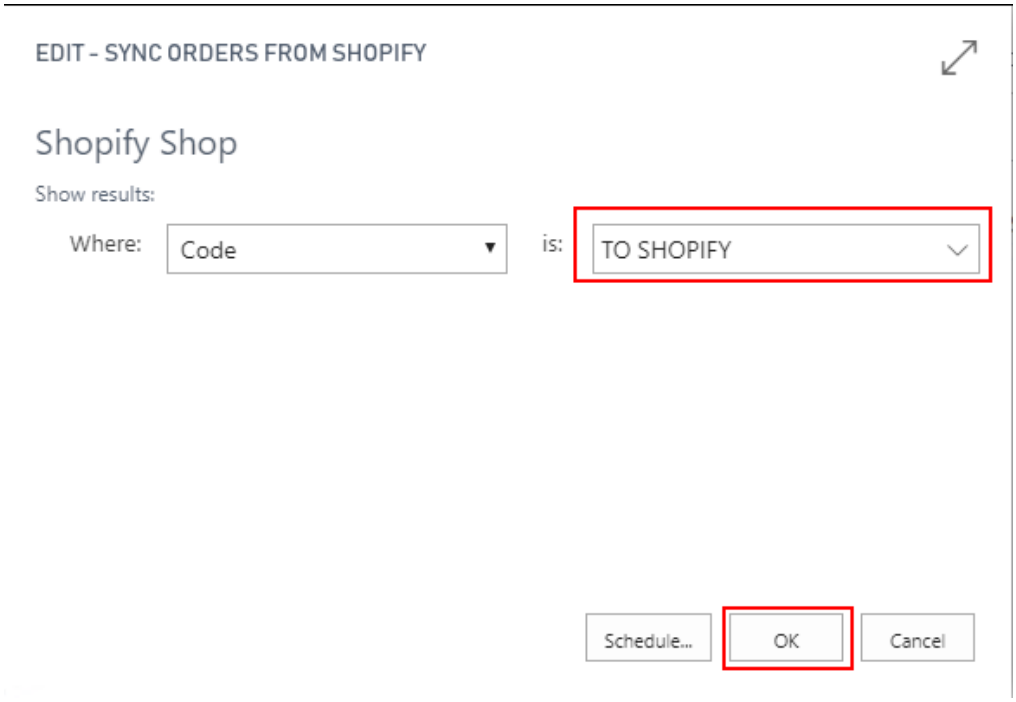
5.2 Execute Order Synchronization

5.2.1 By batch task

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

You can find this task by using the search function from the Role Center:

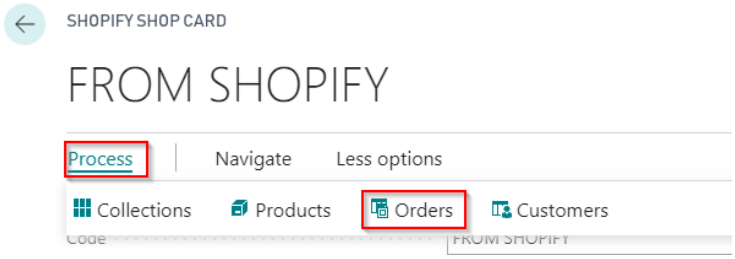


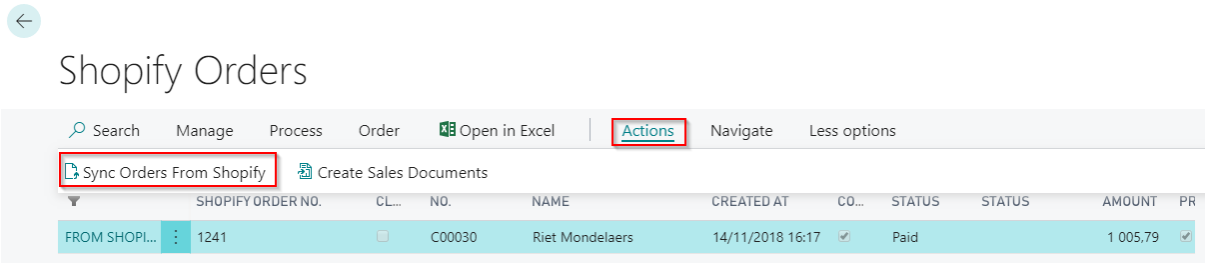


When executing this task, the Shopify Orders are imported in Dynamics 365 Business Central.

5.2.2 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.



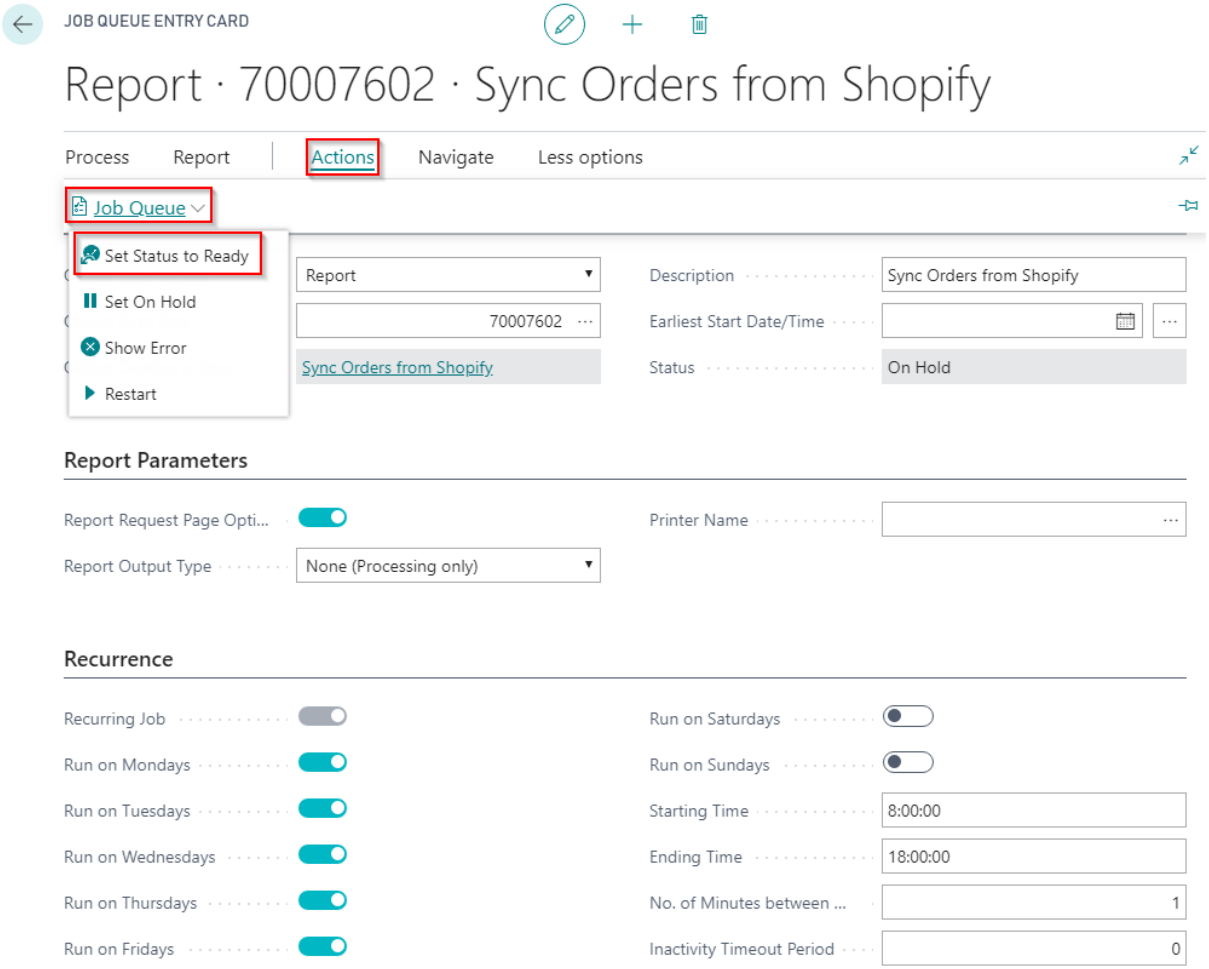


5.2.3 By job queue

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'.

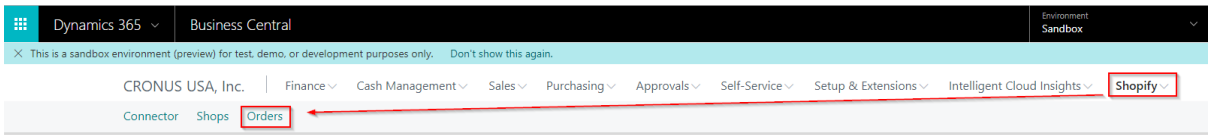


5.3 View Shopify Orders

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

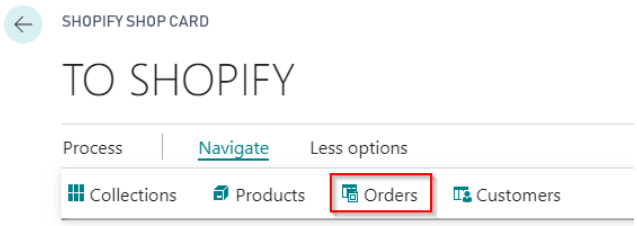
5.3.1 All Shopify Orders

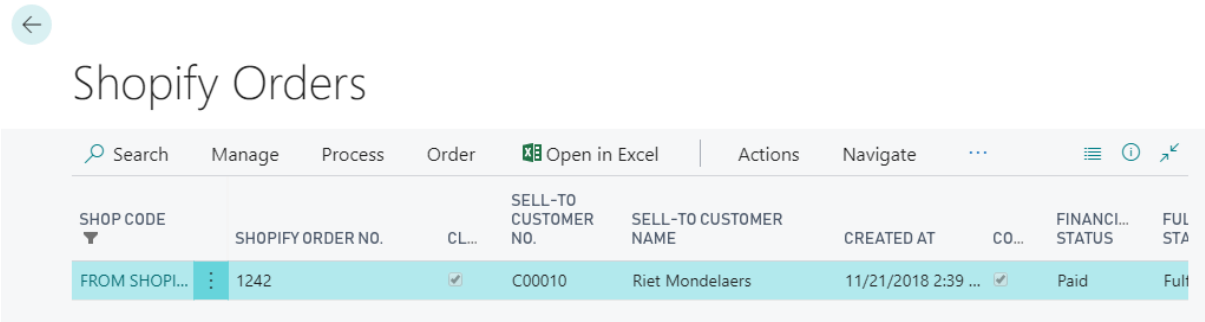
This are all the open orders of all Shopify Shop Accounts



5.3.2 Shopify Orders of a specific shop

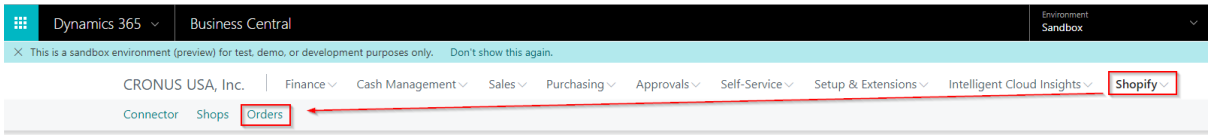
Navigate to the Shopify Shop to get an overview of all the Shopify Orders for this Shop.



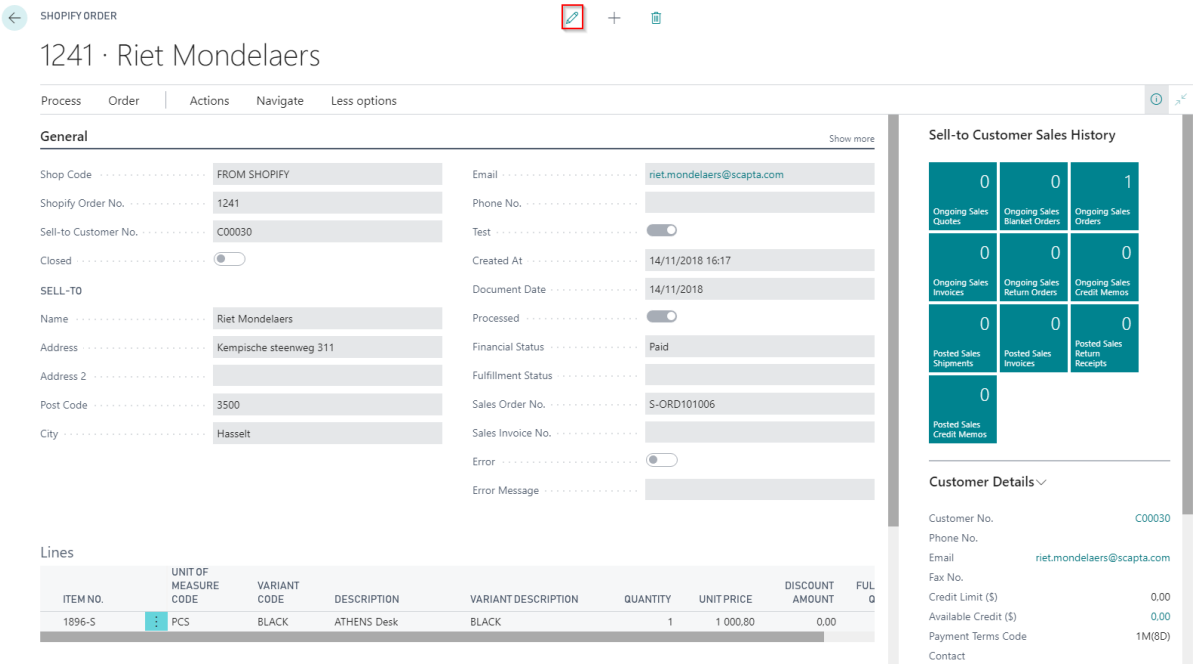


5.4 Process Shopify Orders

Navigate to the Shopify Orders.

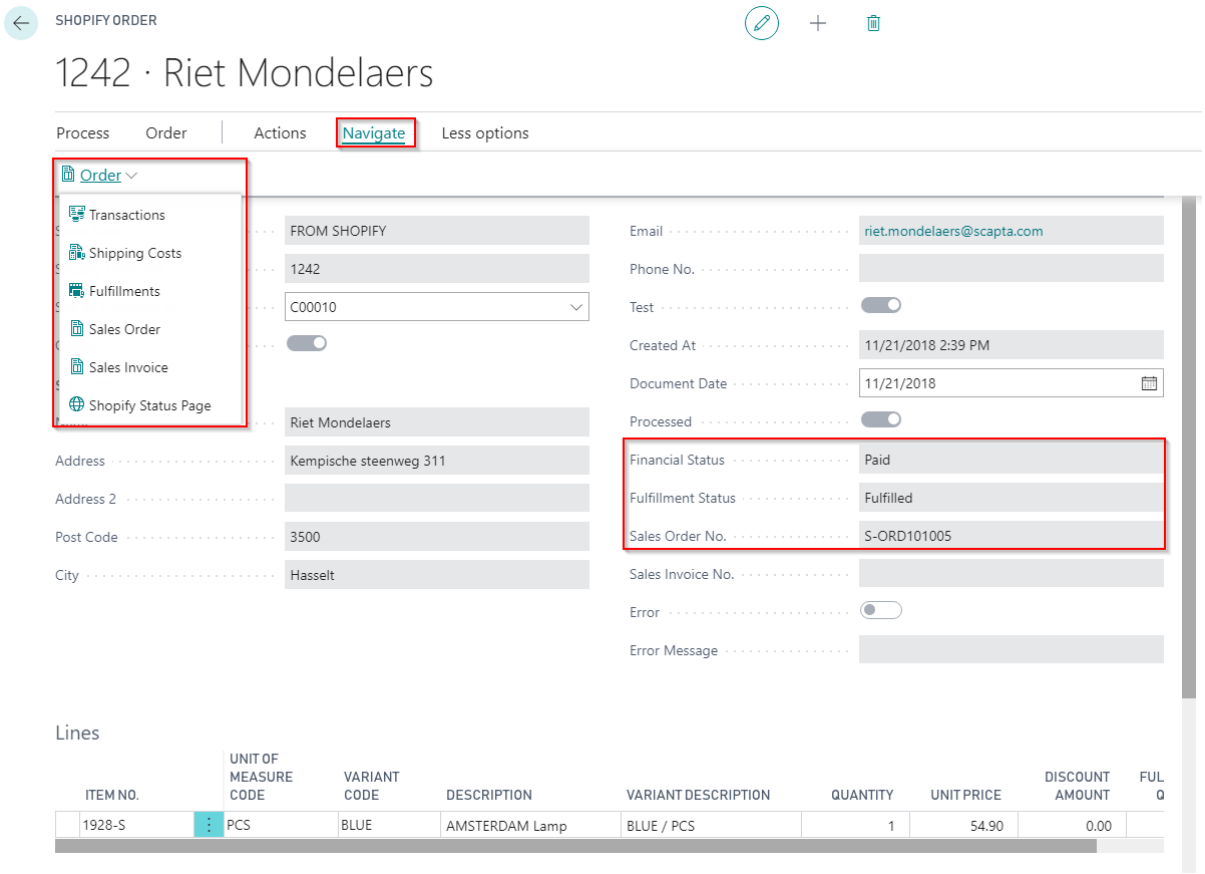


Edit the Shopify order.



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

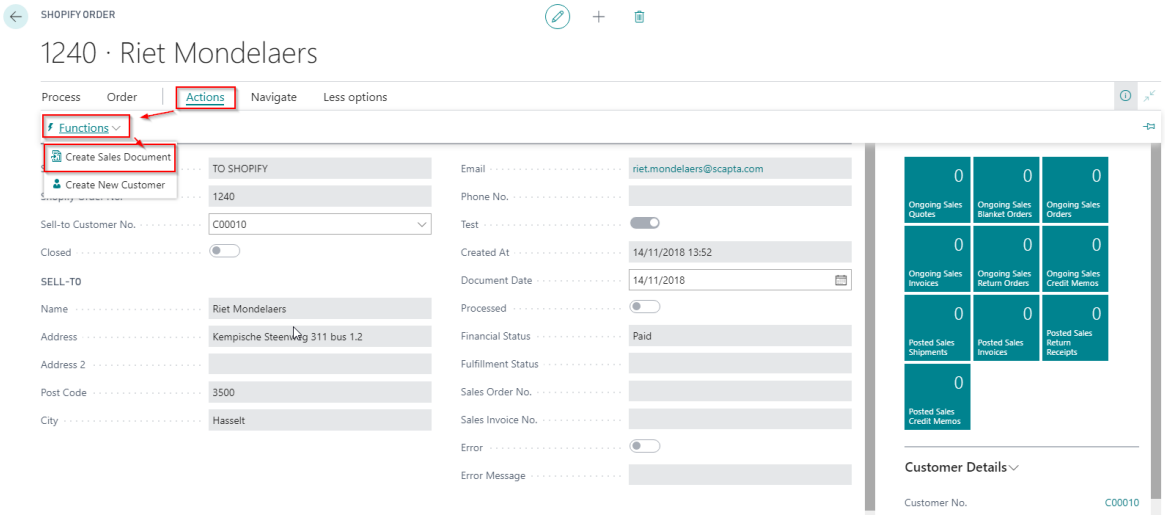
If the customer is not found automatically, you can select the correct customer, or create a new customer directly from the Shopify Order.



When the customer is selected, you can process the Shopify Order to a Sales Order.

5.4.1 By action 'Create Sales Document'

You can process the Shopify order to a sales order by using the action "Create Sales Document".



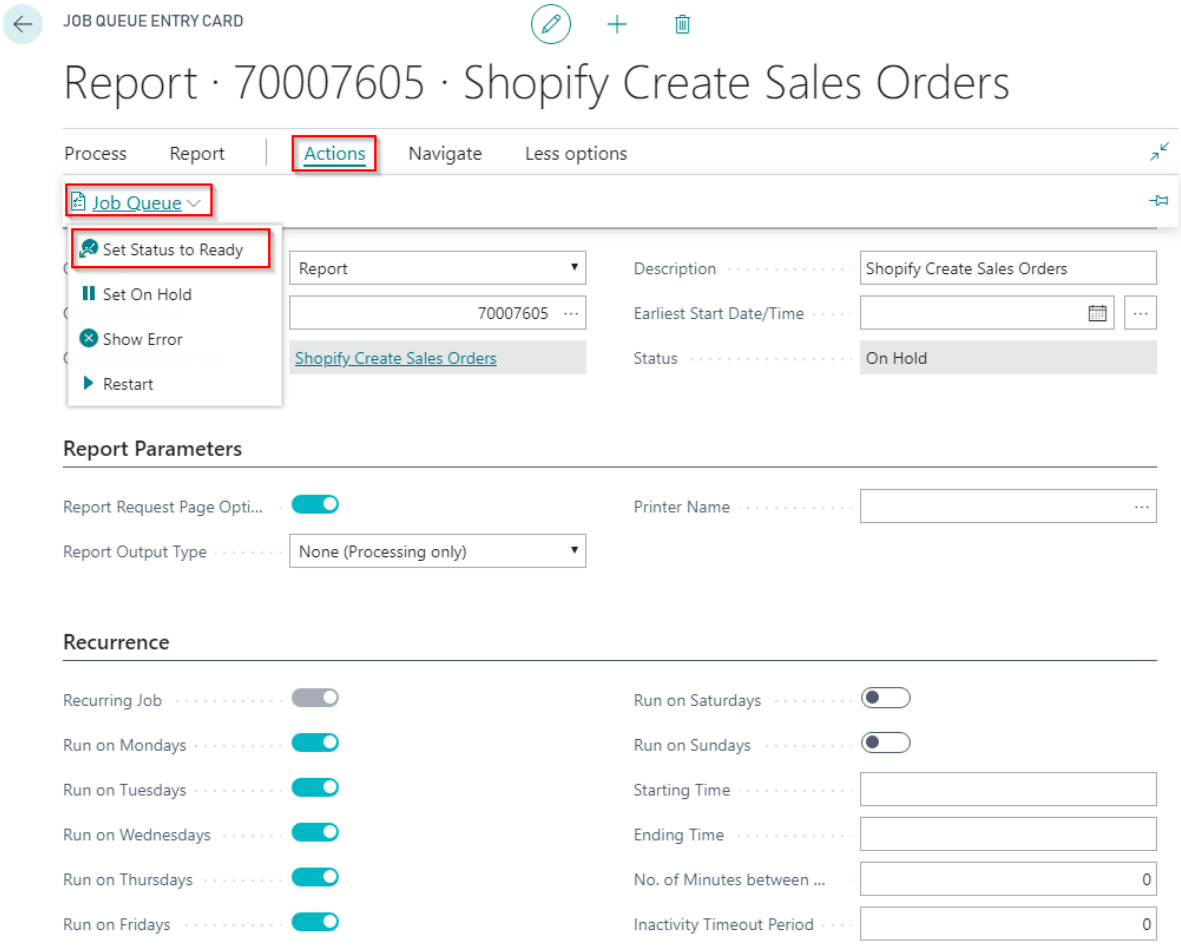
A sales order is now created, and can be handled by using the standard Dynamics 365 Business Central functionalities.

5.4.2 By job queue

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

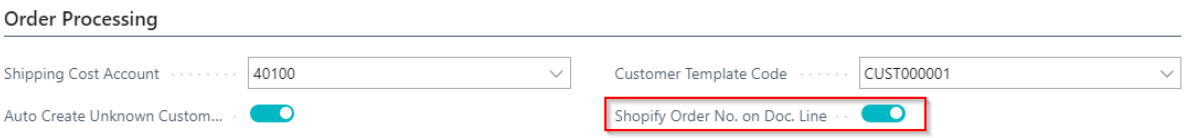
You can find the job queue entries by using the search function from the Role Center:

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

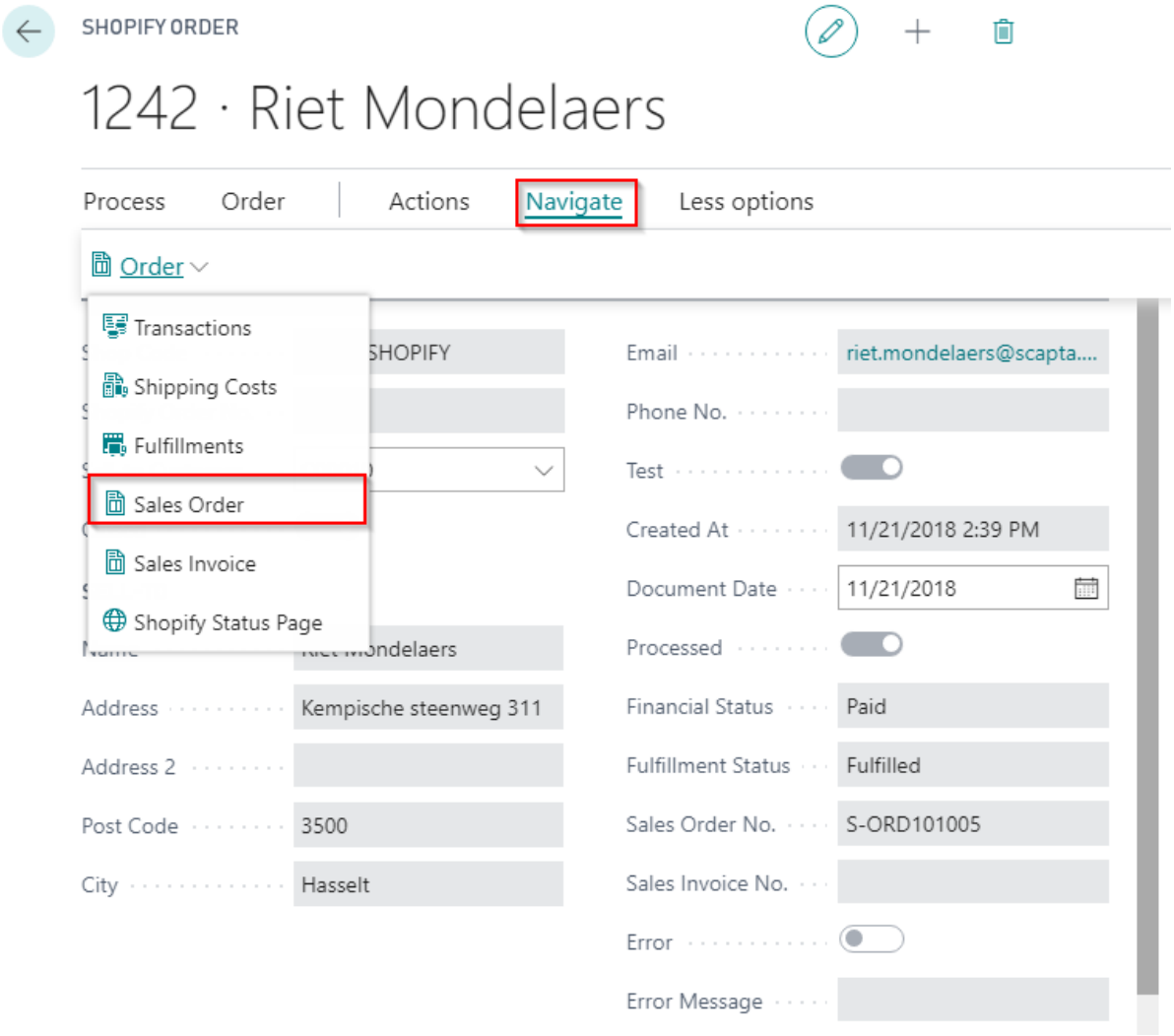


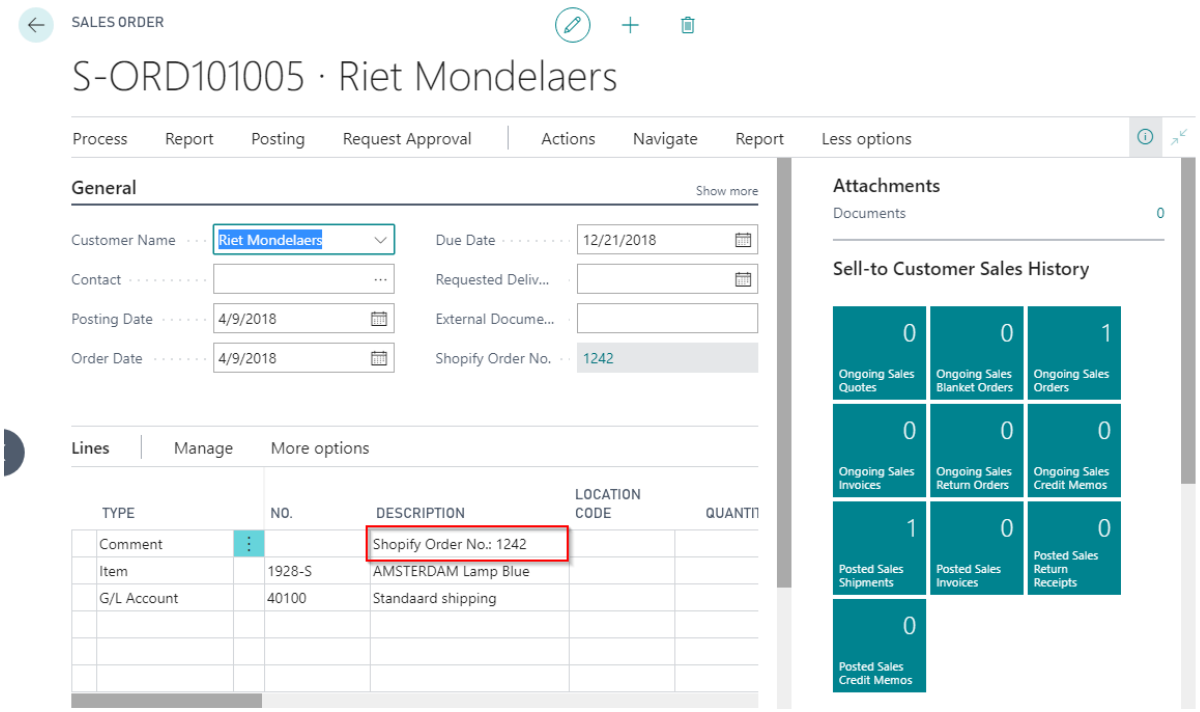
5.4.3 Shopify Order No. on sales document line

On the tab 'Order Processing' of the Shopify Shop Card, you can enter show your Shopify Order No. on the document lines of your sales document.



When you open your sales order, the Shopify order number is displayed on the order lines.


SHOPIFY ORDER
1242 · Riet Mondelaers
Process
Order
Actions
Navigate
Less options
Order
Transactions
Shipping Costs
Fulfillments
Sales Order
Sales Invoice
Shopify Status Page
SHOPIFY
Email
riet.mondelaers@scapta....
Phone No.
Test
Created At
11/21/2018 2:39 PM
Document Date
11/21/2018
Processed
Address
Kempische steenweg 311
Financial Status
Paid
Address 2
Fulfillment Status
Fulfilled
Post Code
3500
Sales Order No.
S-ORD101005
City
Hasselt
Sales Invoice No.
Error
Error Message



5.5 Synchronize Shipments to Shopify

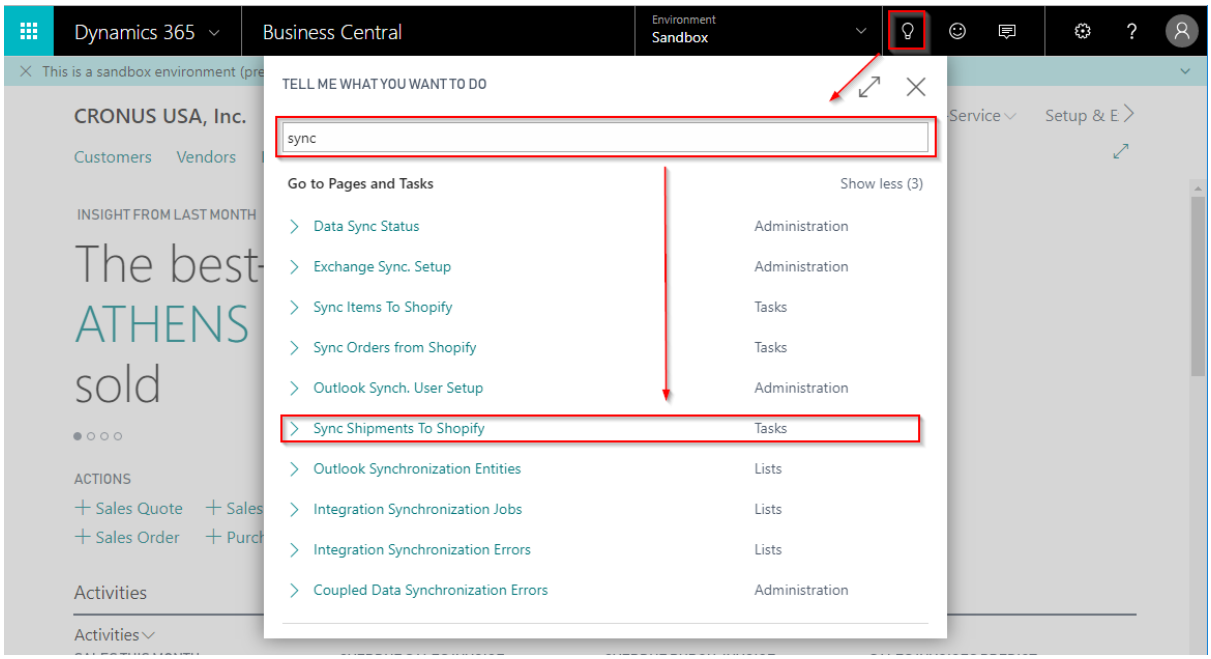
When a sales order that is created from a Shopify Order, is shipped, you can synchronize the shipment to Shopify.

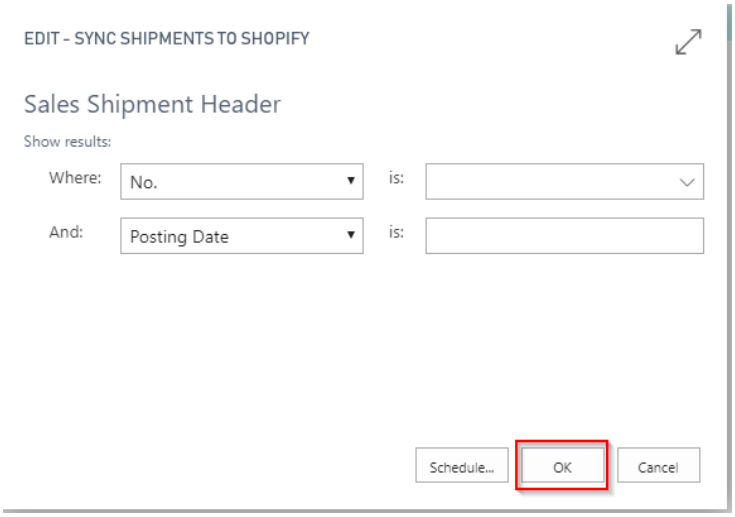
The customer will automatically receive an shipment notice email.
When a Shipping Agent and a Tracking Code is specified on the shipment, the tracking information will be included in the email.

5.5.1 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.





5.5.2 By job queue

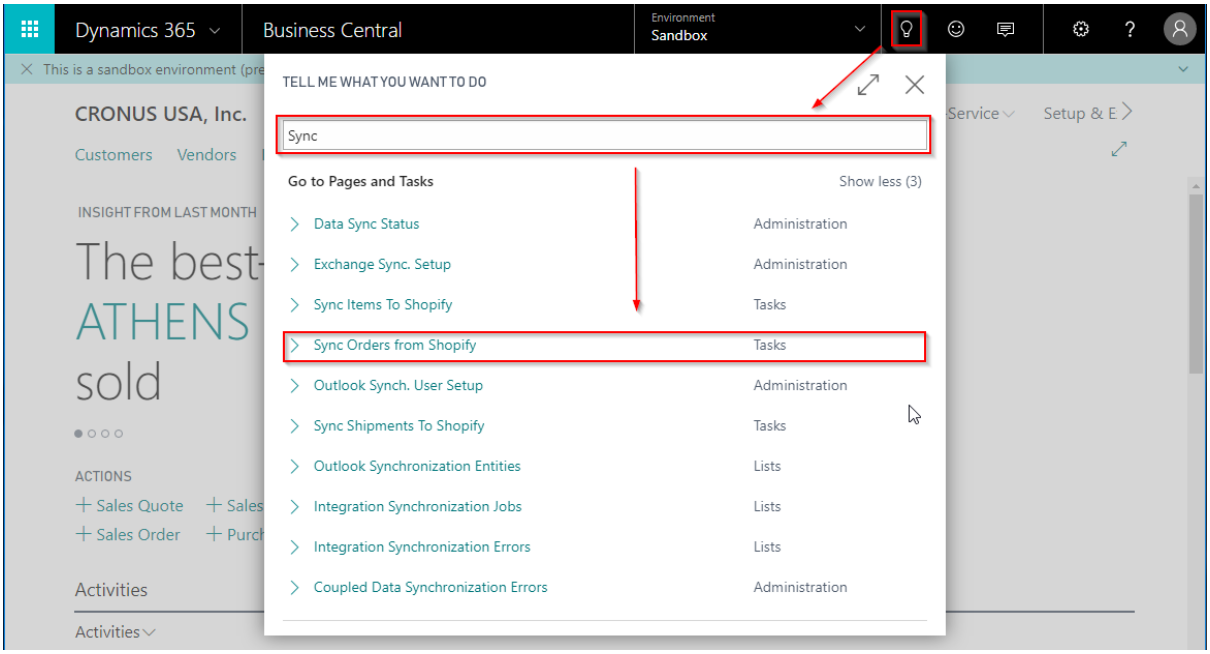
You can also schedule a job to synchronize shipments to Shopify orders that runs for example every few minutes.

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

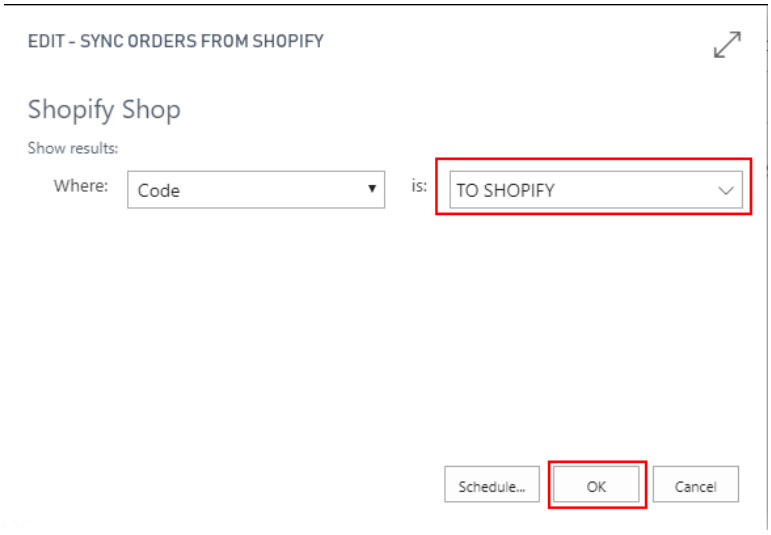
Define the recurrence of the job queue 'Sync Shipments to Shopify' and start the job queue.

5.6 Synchronize orders from Shopify

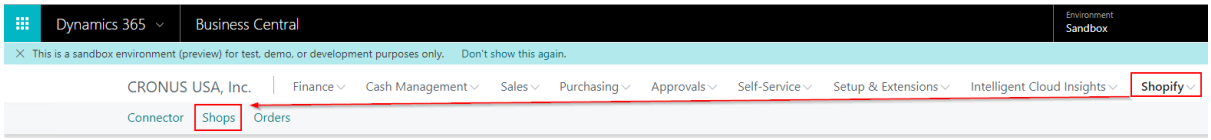
Synchronize the orders from Shopify again to update the fulfillment status in Dynamics 365 Business Central.

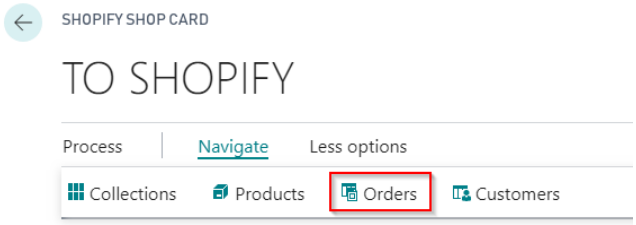


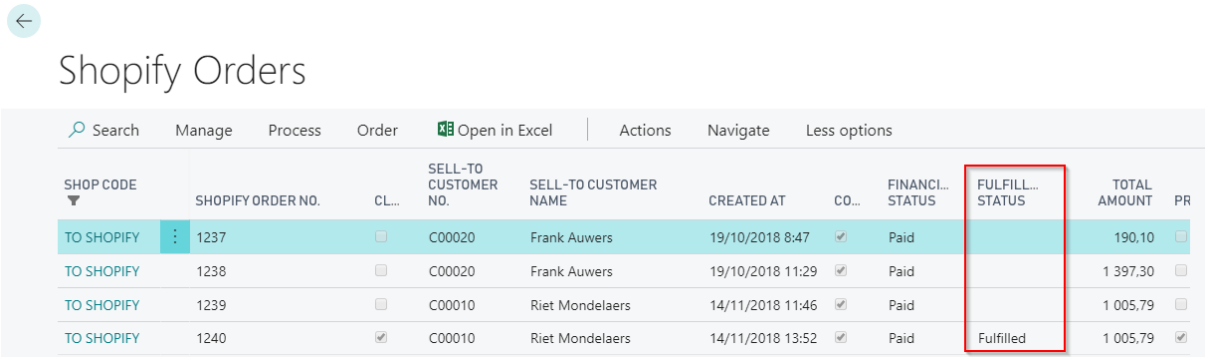
Enter your Shopify Shop

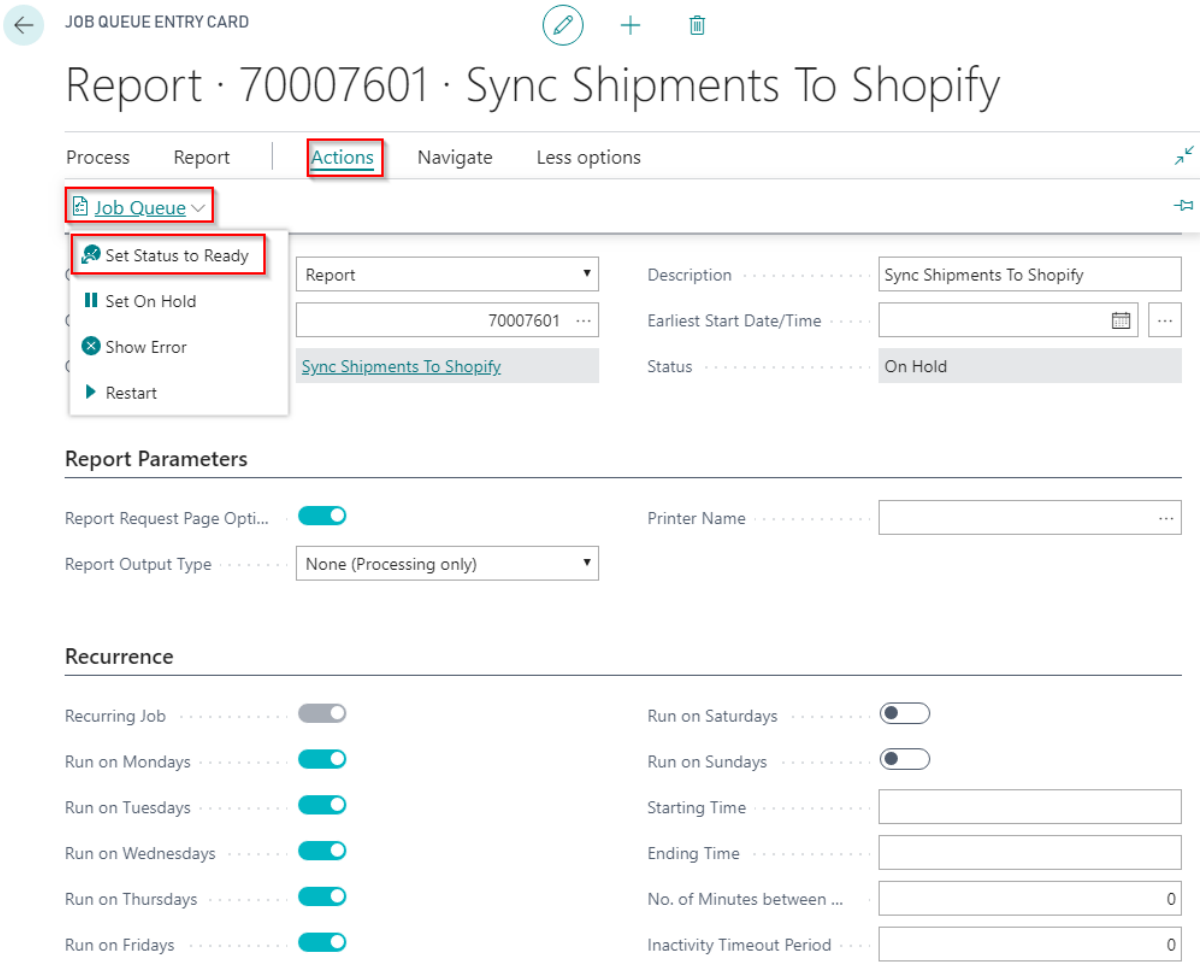


Open the Shopify Orders of the Shopify Shop



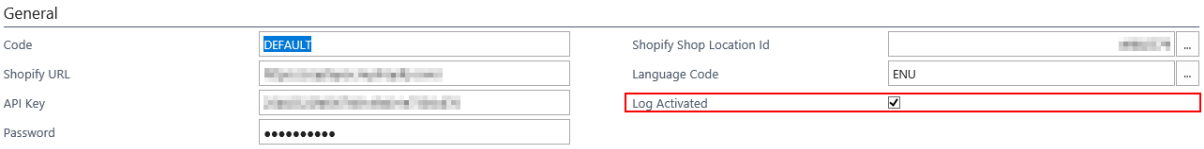




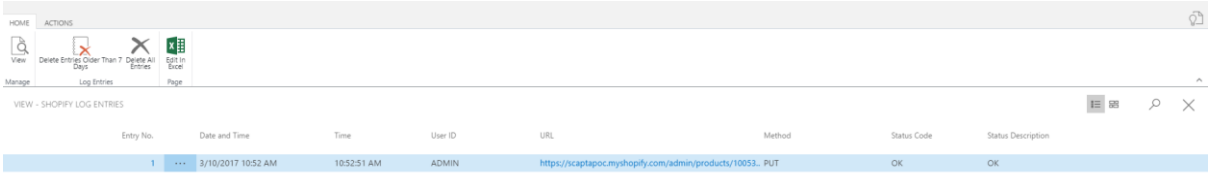

JOB QUEUE ENTRY CARD
Report · 70007601 · Sync Shipments To Shopify
Process
Report
Actions
Navigate
Less options
Job Queue
Set Status to Ready
Set On Hold
Show Error
Restart
Report
70007601
Sync Shipments To Shopify
Description
Sync Shipments To Shopify
Earliest Start Date/Time
Status
On Hold
Report Parameters
Report Request Page Opti...
Printer Name
Report Output Type
None (Processing only)
Recurrence
Recurring Job
Run on Mondays
Run on Tuesdays
Run on Wednesdays
Run on Thursdays
Run on Fridays
Run on Saturdays
Run on Sundays
Starting Time
Ending Time
No. of Minutes between ...
0
Inactivity Timeout Period
0

6. Troubleshooting

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



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



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