



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. 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"

Private apps



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

Create a new private app

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



Unsaved Changes Cancel Save

[< Private apps](#)

Create private app

Description

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

Private app name

Contact email

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

Admin API

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

[Learn more about API authentication.](#)

Your API credentials will be generated when you Save.

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

[▼ Review disabled Admin API permissions](#)

Storefront API

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

[Learn more about custom storefronts.](#)

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

Cancel Save

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



Business Central.

The screenshot shows the 'Private apps' section in Business Central. At the top, there is a 'Create a new private app' button. Below it is a table with three columns: 'Private app name', 'API key', and 'Contact email'. The first row contains the text 'Dynamics 365 Business Central', a masked API key, and the email 'info@scaptify.com'. A trash icon is visible at the end of the row.

Private app name	API key	Contact email
Dynamics 365 Business Central	[Masked API Key]	info@scaptify.com

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 the Shopify sign-up page for a 14-day trial. It features three input fields: 'Email address' (with a masked email), 'Password' (with masked characters), and 'Your store name'. A blue 'Create your store' button is located at the bottom right.

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

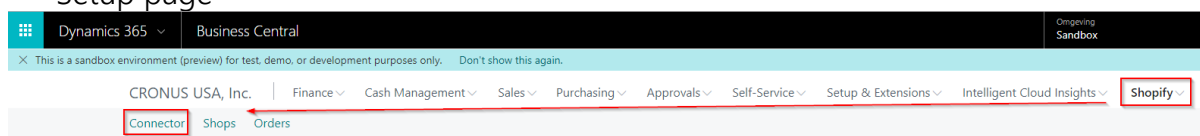


2.3 Microsoft Dynamics 365 Business Central

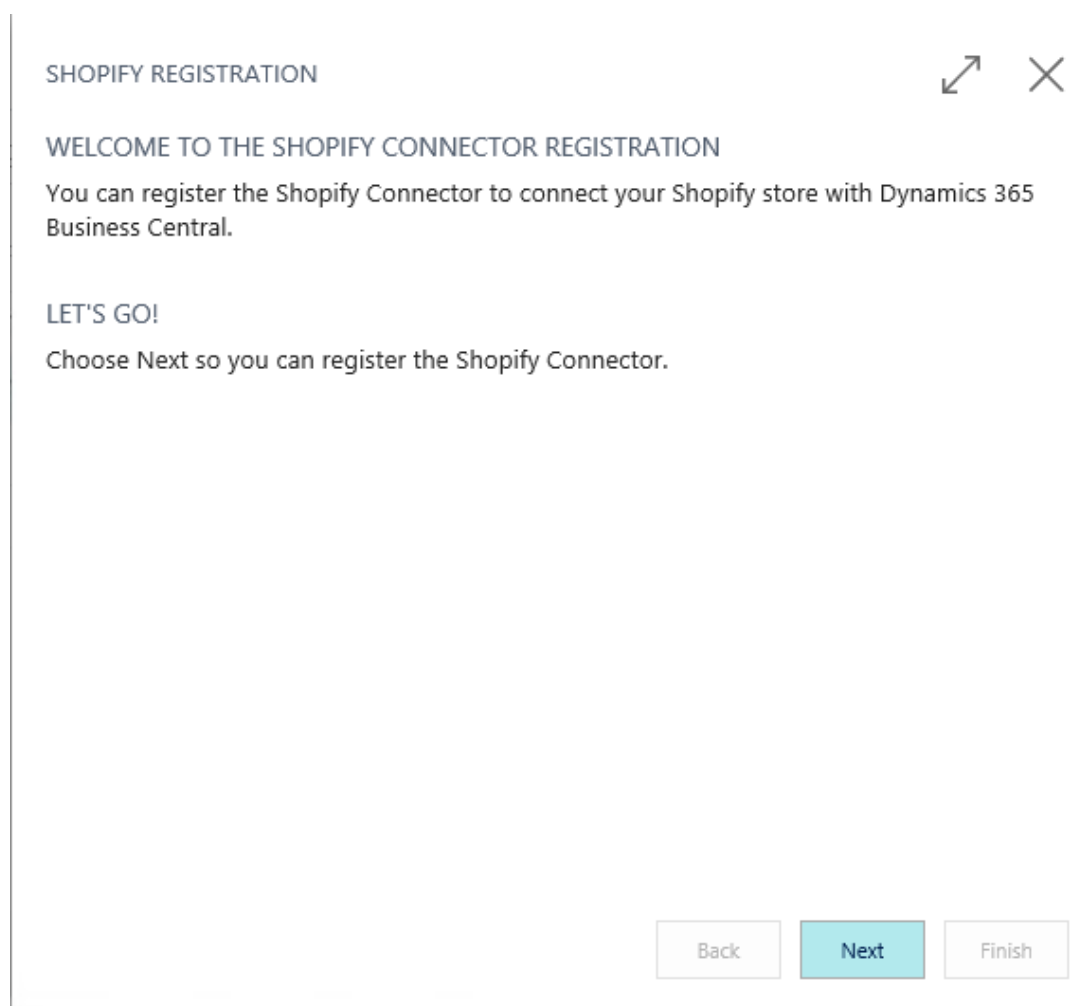
2.3.1 Scaptify Shopify Connector Setup

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.

SHOPIFY REGISTRATION

IF YOU HAVE A LICENCE KEY

License Key

{00000000-0000-0000-0000-000000000000}

PLEASE COMPLETE THE PAGE BELOW TO REGISTER SHOPIFY CONNECTOR.

Name

Scapta

Address

Kempische Steenweg 311 bus 1.2

Address 2

Post Code

3500

...

City

Hasselt

...

County

Country/Region Code

BE

VAT Registration No.

Phone No.

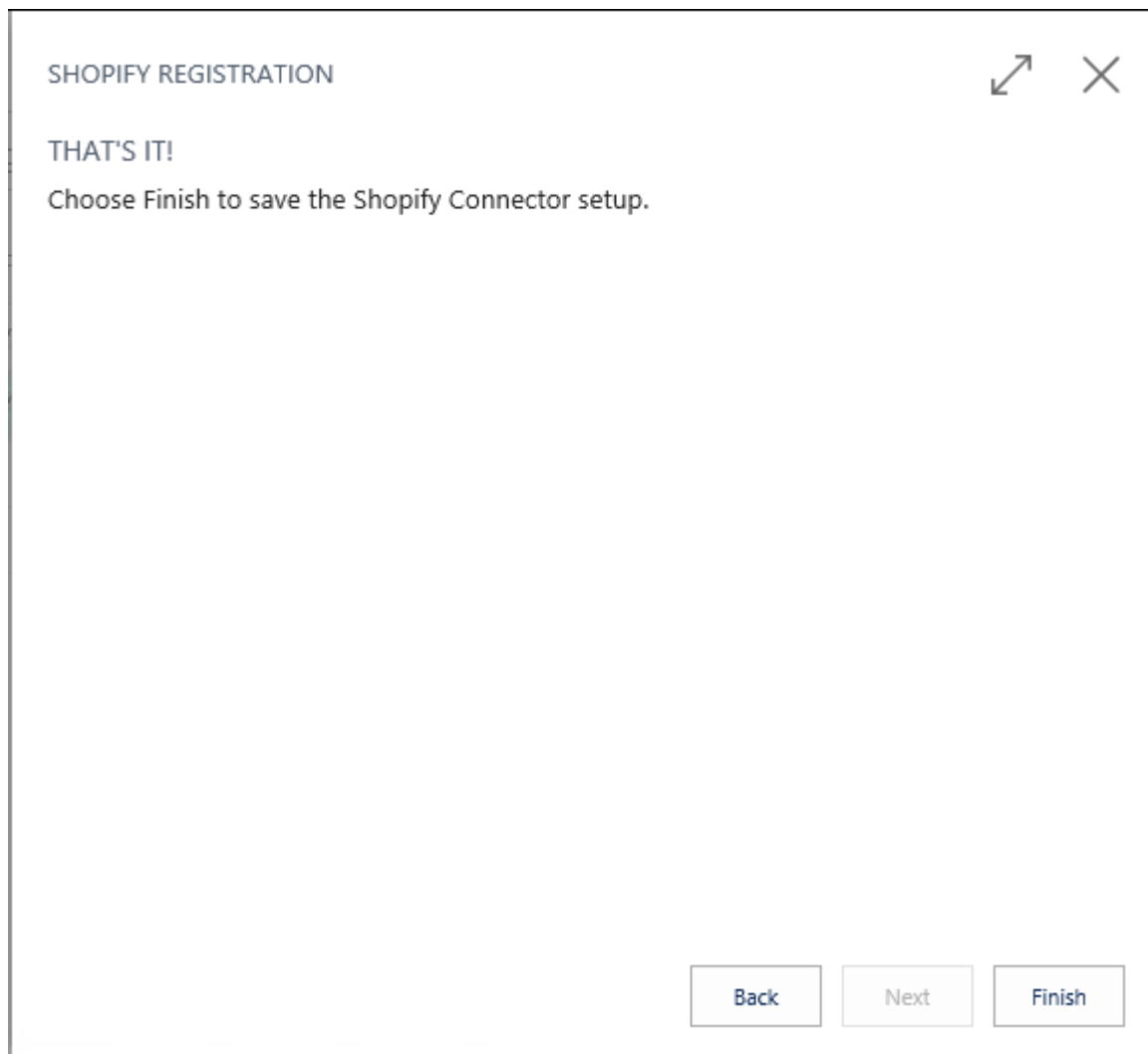
+32 11 600 600

Back

Next

Finish

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



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



CONNECTOR

Shopify Connector Setup

Navigation | Actions | Navigate | Less options

Connector Info

License Key (cfc8a60a-10e6-42ad-b06f-733b83baea86)

Version 11.3.1.1

Partner

Partner Name

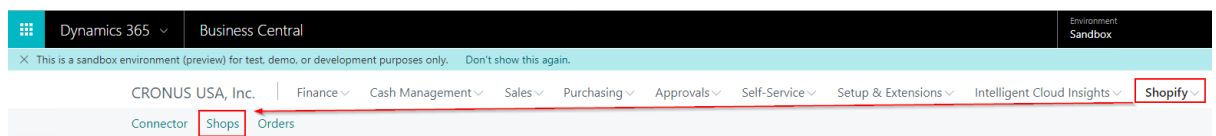
Restrictions

Shopify License Restrictions		Manage	
NAME	PERIODE	VALUE	TYPE
Orders	Month	30	OnHold
Webshops		1	OnHold

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.



SHOPIFY SHOP CARD

TO SHOPIFY

Process | Navigate | Less options

General

Code TO SHOPIFY

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

API Key 25b02522f4057681cf8d01e7336c670

Password *****

Shopify Shop Location Id 49682579

Language Code ENU

Log Activated ☐

Synchronization

Sync Item To Shopify

Auto Create Unknown Items ☐

Item Template Code

Product Collection Tax Group

Customer Price Group

Customer Discount Group

Sync Item Images To Shopify

Option 1 Type Variant

Option 2 Type Unit of Measure

Option 3 Type

Sync Stock To Shopify

Location Filter

Stock Type Location Stock

Order Processing

Shipping Cost Account 40100

Customer Template Code CUST000001

Auto Create Unknown Customers ☐

Shopify Order No. on Doc. Line ☐

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'.

Synchronization

Sync Item	To Shopify ▼	Sync Item Images	To Shopify ▼
Auto Create Unknown It... <input checked="" type="checkbox"/>		Option 1 Type	Variant ▼
Item Template Code	ITEM000001 ▼	Option 2 Type	Unit of Measure ▼
Product Collection	Tax Group ▼	Option 3 Type	▼
Customer Price Group	▼	Sync Stock	To Shopify ▼
Customer Discount Group ..	▼	Location Filter
		Stock 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.


Dynamics 365 Business Central Environment Sandbox

X This is a sandbox environment (preview) for test, demo, or development purposes only. Don't show this again.

CRONUS USA, Inc. | Finance ▼ Cash Management ▼ Sales ▼ Purchasing ▼ Approvals ▼ Self-Service ▼ Setup & Extensions ▼ Intelligent Cloud Insights ▼ **Shopify ▼**





Connector **Shops** Orders



← 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

←

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)							



EDIT - SHOPIFY ADD ITEMS TO SHOP

Shopify Shop

Show results:

Where: Code

is: TO SHOPIFY

Item

Show results:

Where: No.

is:

And: Vendor No.

is:

And: Vendor Item No.

is:

And: Item Category Code

is:

And: Blocked

is:

And: Description

is:

Schedule...

OK

Cancel

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.



ITEM CARD

1896-S · SCAPTA Desk

Process **Item** History Special Sales P...ces & Discounts Request Approval Actions Navigate Report Less options

Attachments Attributes **Tags** Adjust Inventory

Description SCAPTA Desk Base Unit of Measure PCS
Blocked Item Category Code TABLE
Type Inventory

Inventory Show less

Shelf No. Qty. on Asm. Component 0
Created From Catalog Item Stockout Warning Default (Yes)
Search Description ATHENS DESK Prevent Negative Inventory Default (No)
Quantity on Hand 15 ... Net Weight 34.6
Qty. on Purch. Order 7 Gross Weight 39.79
Qty. on Sales Order 0 Unit Volume 1.2
Qty. on Job Order 0 SAT Item Classification
Qty. on Assembly Order 0

Costs & Posting Show more

COST DETAILS POSTING DETAILS
Costing Method FIFO Gen. Prod. Posting Group RETAIL

Attachments
Documents 0

Item Attributes ✓

ATTRIBUTE	VALUE
Color	Black
Depth	60 CM
Width	200 CM
Height	170 CM
Material Description	Wood

Forecast ✓

Status Sales forecast not available for this item.

Item Tags

TAG
Athens
Desk

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.

Synchronization

Sync Item To Shopify

Auto Create Unknown It... ☒

Item Template Code ITEM000001

Product Collection Tax Group

Customer Price Group
Customer Discount Group

Sync Item Images To Shopify

Option 1 Type Variant

Option 2 Type Unit of Measure

Option 3 Type

Sync Stock To Shopify

Location Filter
Stock Type

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.



Shopify Shop Collections

Search New Edit List Delete Open in Excel Actions Less options

Sync

(There is nothing to show in this view)



Shopify Shop Collections

Search	New	Edit List	Delete	Open in Excel	Actions	Less options	
SHOP CODE ▼	PRODUCT COLLECTION	PRODUCT GROUP CODE	COLLECTION NAME	ITEM TEMPLATE CODE	DEFA... FOR EXPO...		
TO SHOPIFY	Tax Group	FURNITURE	FURNITURE		☑		
TO SHOPIFY	Tax Group	LABOR	LABOR		☑		
TO SHOPIFY	Tax Group	MATERIALS	MATERIALS		☑		
TO SHOPIFY	Tax Group	SUPPLIES	SUPPLIES		☑		

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" :



The screenshot shows the Shopify admin interface. The left sidebar contains navigation links: Home, Orders, Products (highlighted with a red box), All products, Transfers, Inventory, Collections, Gift cards, Customers, Analytics, Marketing, Discounts, Apps, SALES CHANNELS, Point of Sale, and Online Store. The main content area is titled 'Products' and includes an 'Add product' button. Below the title are 'Export' and 'Import' links. A search bar and a 'Filter' dropdown are present. The product list table has the following data:

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



Products

ATHENS Desk

Duplicate

View

Promote

Title

ATHENS Desk

Description

A B I U

Color

Text

Image

Video

Link

This is a desk.
This desk is black.

Item Attributes

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

Images

Add image from URL

Add images

Product availability

Manage

Available on 1 of 1 channels and apps

Online Store

Organization

Product type

Assorted Tables

Vendor

Graphic Design Institute

Collections

Search for collections

FURNITURE

Tags

View all tags

Vintage, cotton, summer

Desk Athens

Reorder variants

Edit options

Add variant

Select: All None BLACK WHITE PCS

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



3.2 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'.

Synchronization	
Sync Item	From Shopify
Auto Create Unknown Items	<input checked="" type="checkbox"/>
Item Template Code	ITEM000001
Product Collection	Tax Group
Sync Item Images	From Shopify
Option 1 Type	Variant
Option 2 Type	
Option 3 Type	
Sync Stock	From Shopify

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.

Synchronization	
Sync Item	From Shopify
Auto Create Unknown Items	<input checked="" type="checkbox"/>
Item Template Code	ITEM000001
Product Collection	Tax Group
Sync Item Images	From Shopify
Option 1 Type	Variant
Option 2 Type	
Option 3 Type	
Sync Stock	From Shopify

3.2.3 Synchronize collections

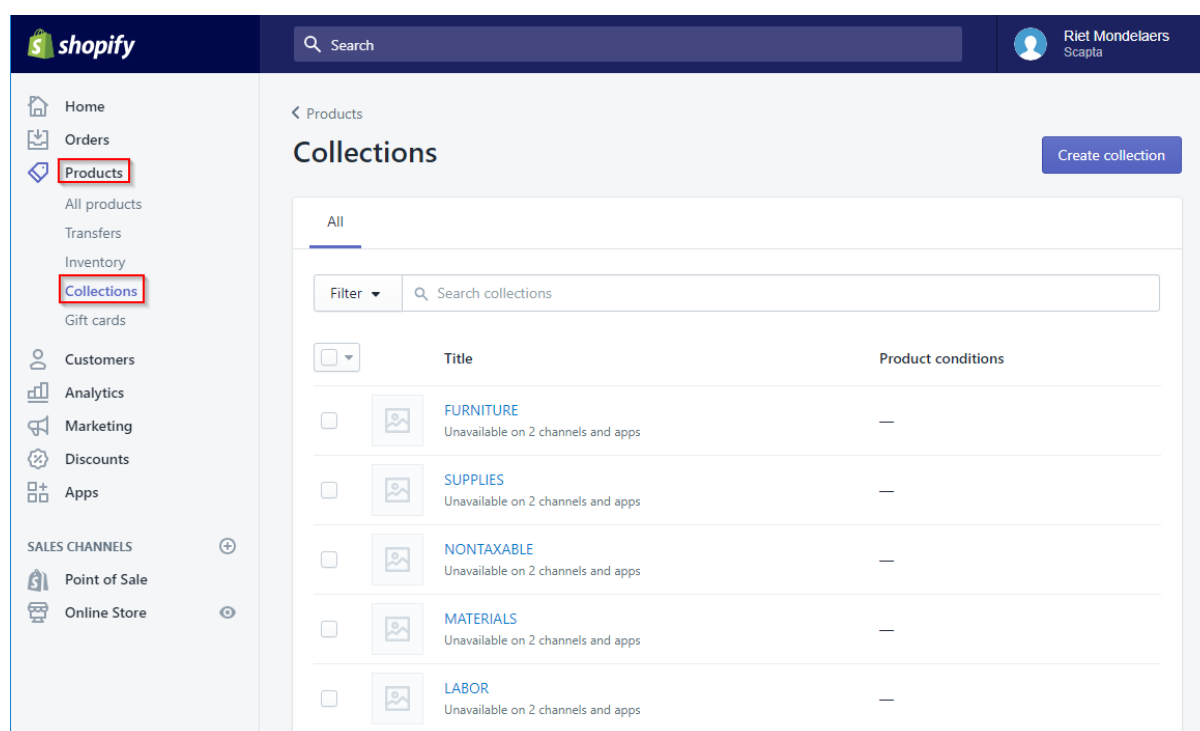
On the tab 'Synchronization' of the Shopify Shop Card, you can enter to sync the collections from Shopify.



Synchronization

Sync Item	From Shopify ▼	Option 1 Type	Variant ▼
Auto Create Unknown It...	<input checked="" type="checkbox"/>	Option 2 Type	Unit of Measure ▼
Item Template Code	ITEM000001 ▼	Option 3 Type	▼
Product Collection	Tax Group ▼	Sync Stock	From Shopify ▼
Sync Item Images	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.



← SHOPIFY SHOP CARD

FROM SHOPIFY

Process | **Navigate** | Less options

Collections | Products | Orders | Customers

Code FROM SHOPIFY

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

API Key 25b02522f4f057681cf8d01e7336c670

Password

←

Shopify Shop Collections

Search New Edit List Delete Open in Excel | **Actions** | Less options

Sync

SHOP CODE ▼	COLLECTION	CODE	COLLECTION NAME	CODE	EXP0...
-------------	------------	------	-----------------	------	---------

←


Shopify Shop Collections

SHOP CODE ▼	PRODUCT COLLECTION	PRODUCT GROUP CODE	COLLECTION NAME	ITEM TEMPLATE CODE	DEFA... FOR EXP0...
FROM SHOPIFY	Tax Group	FURNITURE	FURNITURE	ITEM000006	<input checked="" type="checkbox"/>
FROM SHOPIFY	Tax Group	LABOR	LABOR	ITEM000003	<input checked="" type="checkbox"/>
FROM SHOPIFY	Tax Group	MATERIALS	MATERIALS	ITEM000005	<input checked="" type="checkbox"/>
FROM SHOPIFY	Tax Group	NONTAXABLE	NONTAXABLE	ITEM000002	<input checked="" type="checkbox"/>
FROM SHOPIFY	Tax Group	SUPPLIES	SUPPLIES	ITEM000001	<input checked="" type="checkbox"/>

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.



← 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

←

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	SKU
Export to S...	:	1896-S	BLACK		Graphic Design Institute			1896-S
Export to S...		1896-S	WHITE		Graphic Design Institute			1896-S
Export to S...		1900-S			First Up Consultants			1900-S

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.

Synchronization	
Sync Item	To Shopify
Auto Create Unknown Items	<input checked="" type="checkbox"/>
Item Template Code	ITEM000001
Product Collection	Tax Group
Customer Price Group	
Customer Discount Group	
Sync Item Images	To Shopify
Option 1 Type	Variant
Option 2 Type	
Option 3 Type	
Sync Stock	To Shopify
Location Filter	EAST MAIN
Stock Type	Location Stock

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.



← 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

←

Shopify Shop Products

Search New Edit List Delete Open in Excel **Actions** Less options

Add Items Sync **Sync Stock** Create Item

ACTION	ITEM NO.	BARCODE	SKU	TITLE	CODE	PRODUCTTYPE	PI
Export to S...			1896-S	ATHENS Desk		Assorted Tables	1.0
Export to S...			1896-S	ATHENS Desk		Assorted Tables	1.0
Export to S...			1900-S	PARIS Guest Chair, black		Office Chair	1!

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






shopify

Search

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

Inventory

Filter Search variants

Product variant	SKU	When sold out	Incoming	Quantity	Update quantity
 AMSTERDAM Lamp PCS	1928-S	Continue selling	0	8	Add Set 0 Save
 AMSTERDAM Lamp SS PCS	SCAPTA	Continue selling	0	0	Add Set 0 Save
 ANTWERP Conference Table PCS	1920-S	Continue selling	0	1	Add Set 0 Save
 ATHENS Mobile Pedestal PCS	1906-S	Continue selling	0	3	Add Set 0 Save
 ATLANTA Whiteboard, base PCS	1996-S	Continue selling	0	0	Add Set 0 Save



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.

Order Processing

Shipping Cost Account 40100

Auto Create Unknown Customers ☒

Customer Template Code CUST000001

Shopify Order No. on Doc. Line ☒

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.



SHOPIFY SHOP CARD

FROM SHOPIFY

Process | Navigate | Less options

Collections Products Orders Customer Templates Customers



← SHOPIFY CUSTOMER TEMPLATES ↗

Search + New Edit List Delete Open in Excel

COUNTRY CODE		CUSTOMER TEMPLATE CODE
FR	:	CUST FR
NL		CUST NL

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

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

Dynamics 365 Business Central Orders Environment Sandbox

CRONUS USA, Inc. <ant> Sales Purchasing Approvals Self-Service Setup & Extensions Intelligent Cloud Insights Shopify >

Orders: All Search Delete Process Order Open in Excel Actions Navigate Less options

SHOP CODE	SHOPIFY ORDER NO.	CL...	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	CREATED AT	CO...	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"/>	



← SHOPIFY CUSTOMER TEMPLATES

Search + New Edit List Delete Open in Excel

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

5.1.3 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.

← SHOPIFY SHOP CARD

TO SHOPIFY

Process | **Navigate** | Less options

Collections Products Orders **Customers**

Code TO SHOPIFY

← Shopify Shop Customer List

Search Edit List Delete Open in Excel

SHOP CODE	CUSTOMER ID	CUSTOMER NO.	E-MAIL	FIRST NAME	LAST NAME	PHONE NO.	TAX EXEMPT	E-MAIL VERIF.
TO SHOPIFY	679172866083	C00010	riet.mondelaers@scapta.com	Riet	Mondelaers		<input type="checkbox"/>	<input checked="" type="checkbox"/>
TO SHOPIFY	753725210659	C00020	Frank.Auwers@scapta.com	Frank	Auwers		<input type="checkbox"/>	<input checked="" type="checkbox"/>

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'.



SHOPIFY ORDER

1245 · Fabrizio Spegona

Process Order **Actions** Navigate Less options

Functions ▾

- Create Sales Document
- Create New Customer

Customer Template C... *

Sell-to Customer No. *

Closed

Email Test2@test.nl

Phone No.

Test ☐

Created At 18-1-2019 10:15

Document Date 18-1-2019

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'.

SHOPIFY SHOP CUSTOMER LIST

Search Edit List Delete Process Open in Excel **Actions** Less options

Functions ▾

- Create New Customer

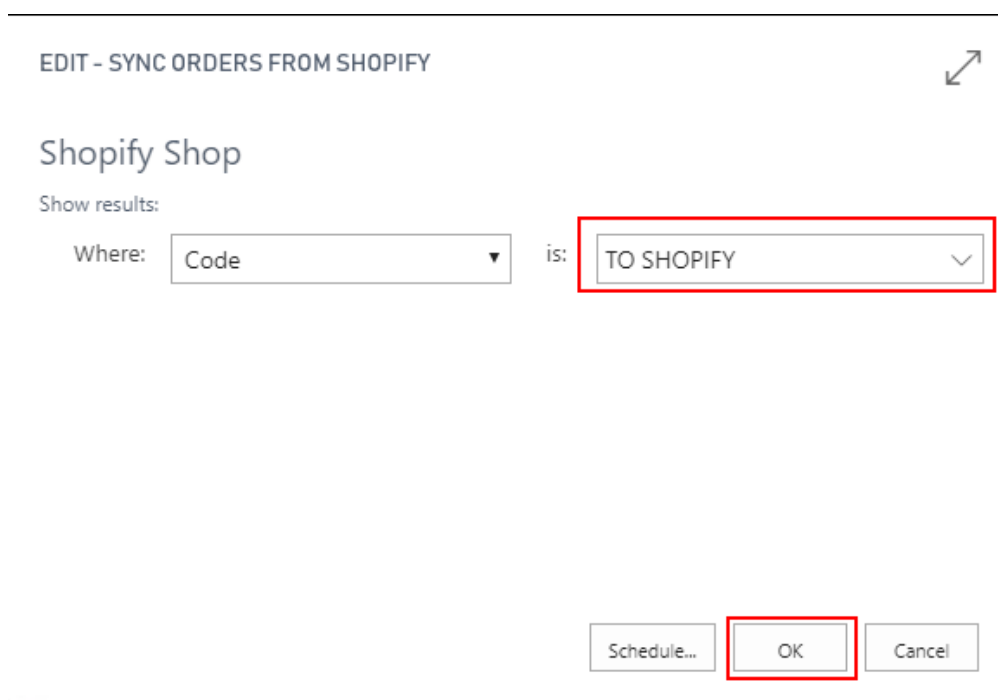
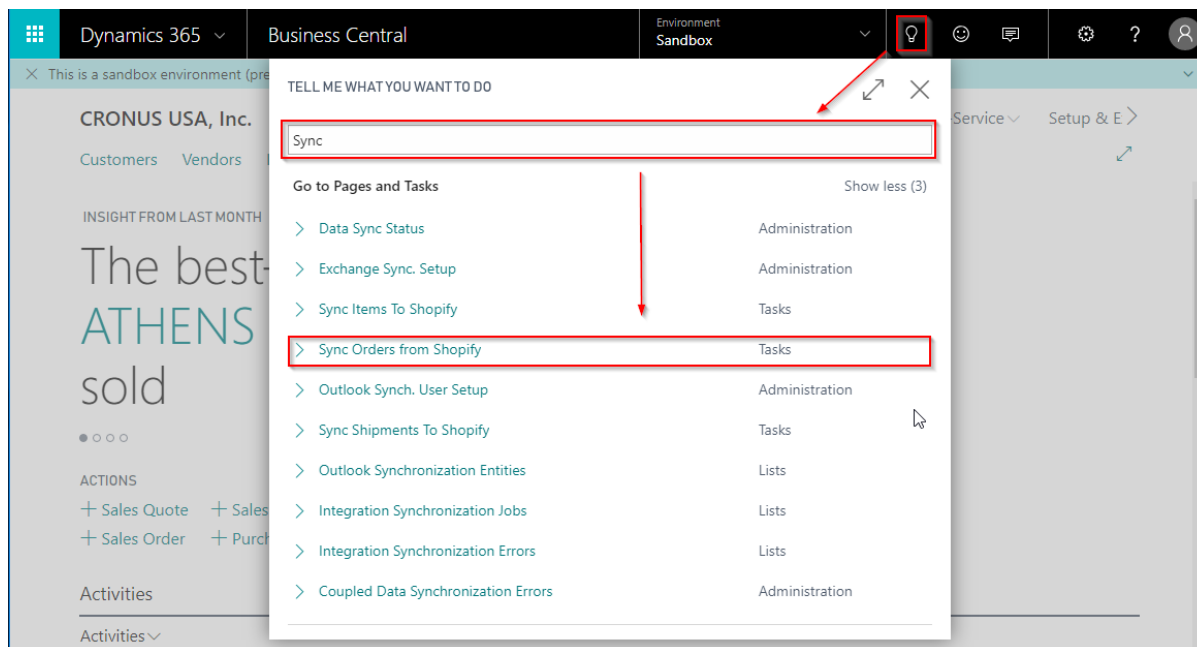
FROM SHOPIFY	679172866083	CUST000001	riet.mondelaers@scapta.com
FROM SHOPIFY	939068522531	CUST NL	C00010 Test@test.nl
FROM SHOPIFY	939070685219	CUST FR	C00020 Test1@test.nl
FROM SHOPIFY	939071733795	CUST IT	C00040 Test2@test.nl
FROM SHOPIFY	939079532579	CUST000001	C00030 Test3@test.nl

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.

The screenshot shows the Scaptify interface. At the top, there is a navigation bar with a back arrow and the text 'SHOPIFY SHOP CARD'. Below this, the text 'FROM SHOPIFY' is displayed. A menu bar contains 'Process' (highlighted with a red box), 'Navigate', and 'Less options'. Below the menu bar, there are icons for 'Collections', 'Products', 'Orders' (highlighted with a red box), and 'Customers'. Below the icons, there is a table with a header 'FROM SHOPIFY' and a row with the text 'FROM SHOPIFY'.

Below the first screenshot, there is another screenshot showing the 'Shopify Orders' page. At the top, there is a navigation bar with a back arrow and the text 'Shopify Orders'. Below this, there is a search bar and a menu bar with 'Search', 'Manage', 'Process', 'Order', 'Open in Excel', 'Actions' (highlighted with a red box), 'Navigate', and 'Less options'. Below the menu bar, there are two buttons: 'Sync Orders From Shopify' (highlighted with a red box) and 'Create Sales Documents'. Below the buttons, there is a table with the following columns: 'SHOPIFY ORDER NO.', 'CL...', 'NO.', 'NAME', 'CREATED AT', 'CO...', 'STATUS', 'STATUS', 'AMOUNT', and 'PR'. The table contains one row with the following data: 'FROM SHOPIFY...', '1241', 'C00030', 'Riet Mondelaers', '14/11/2018 16:17', 'Paid', '1 005,79', and a checkmark.

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:



TELL ME WHAT YOU WANT TO DO

job queue

Go to Pages and Tasks

> Job Queue Entries

Lists

> Job Queue Categories

Lists

> Job Queue Log Entries

Lists

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



← JOB QUEUE ENTRY CARD ✎ + 🗑

Report · 70007602 · Sync Orders from Shopify

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

Job Queue ▾

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

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

Report Parameters

Report Request Page Opti... ☒ Printer Name

Report Output Type None (Processing only)

Recurrence

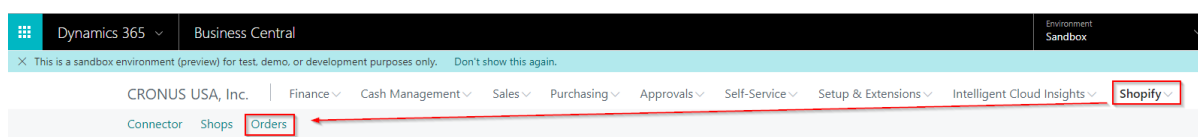
Recurring Job	Run on Saturdays
Run on Mondays	Run on Sundays
Run on Tuesdays	Starting Time
Run on Wednesdays	Ending Time
Run on Thursdays	No. of Minutes between ...
Run on Fridays	Inactivity Timeout Period

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


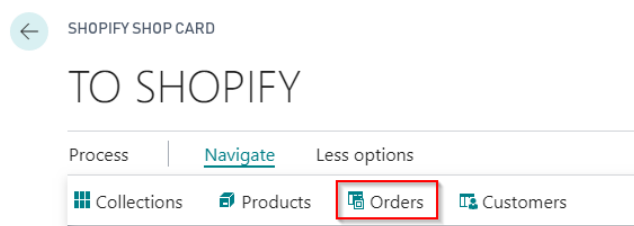
This are all the open orders of all Shopify Shop Accounts





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.

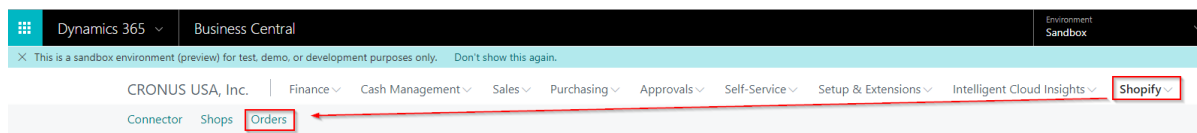


Shopify Orders

Search	Manage	Process	Order	Open in Excel	Actions	Navigate
SHOP CODE	SHOPIFY ORDER NO.	CL...	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	CREATED AT	CO...	FINANCI... STATUS	FUL STA	
FROM SHOPI...	1242	✓	C00010	Riet Mondelaers	11/21/2018 2:39 ...	✓	Paid	Fult	

5.4 Process Shopify Orders

Navigate to the Shopify Orders.



Edit the Shopify order.



←

SHOPIFY ORDER

+

1241 · Riet Mondelaers

Process | Order | Actions | Navigate | Less options

General

Show more

Shop Code

FROM SHOPIFY

Email

riet.mondelaers@scapta.com

Shopify Order No.

1241

Phone No.

Sell-to Customer No.

C00030

Test

☐

Closed

☒

Created At

14/11/2018 16:17

SELL-TO

Document Date

14/11/2018

Name

Riet Mondelaers

Processed

☐

Address

Kempische steenweg 311

Financial Status

Paid

Address 2

Fulfillment Status

Post Code

3500

Sales Order No.

S-ORD101006

City

Hasselt

Sales Invoice No.

Error

☐

Error Message

Lines

ITEM NO.	UNIT OF MEASURE CODE	VARIANT CODE	DESCRIPTION	VARIANT DESCRIPTION	QUANTITY	UNIT PRICE	DISCOUNT AMOUNT	FUL
1896-S	PCS	BLACK	ATHENS Desk	BLACK	1	1 000.80	0.00	0

Sell-to Customer Sales History

Ongoing Sales Quotes	0	Ongoing Sales Blanket Orders	0	Ongoing Sales Orders	1
Ongoing Sales Invoices	0	Ongoing Sales Return Orders	0	Ongoing Sales Credit Memos	0
Posted Sales Shipments	0	Posted Sales Invoices	0	Posted Sales Return Receipts	0
Posted Sales Credit Memos	0				

Customer Details

Customer No.

C00030

Phone No.

Email

riet.mondelaers@scapta.com

Fax No.

Credit Limit (\$)

0.00

Available Credit (\$)

0.00

Payment Terms Code

1M(8D)

Contact

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

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



← SHOPIFY ORDER ✎ + 🗑

1242 · Riet Mondelaers

Process Order **Actions** Navigate Less options

Order ▾

Transactions

Shipping Costs

Fulfillments

Sales Order

Sales Invoice

Shopify Status Page

FROM SHOPIFY

1242

C00010 ▾

☐

Riet Mondelaers

Kempische steenweg 311

3500

Hasselt

Email riet.mondelaers@scapta.com

Phone No.

Test ☐

Created At 11/21/2018 2:39 PM

Document Date 11/21/2018 📅

Processed ☐

Financial Status Paid

Fulfillment Status Fulfilled

Sales Order No. S-ORD101005

Sales Invoice No.

Error ☐

Error Message

Lines

ITEM NO.	UNIT OF MEASURE CODE	VARIANT CODE	DESCRIPTION	VARIANT DESCRIPTION	QUANTITY	UNIT PRICE	DISCOUNT AMOUNT	FUL Q
1928-S	PCS	BLUE	AMSTERDAM Lamp	BLUE / PCS	1	54.90	0.00	

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".



SHOPIFY ORDER

1240 · Riet Mondelaers

Process Order **Actions** Navigate Less options

Functions

- Create Sales Document
- Create New Customer

TO SHOPIFY

1240

Sell-to Customer No. C00010

Closed

SELL-TO

Name Riet Mondelaers

Address Kempische Steenweg 311 bus 1.2

Address 2

Post Code 3500

City Hasselt

Email riet.mondelaers@scapta.com

Phone No.

Test

Created At 14/11/2018 13:52

Document Date 14/11/2018

Processed

Financial Status Paid

Fulfillment Status

Sales Order No.

Sales Invoice No.

Error

Error Message

Summary Dashboard:

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
Posted Sales Credit Memos		

Customer Details

Customer No. C00010

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:

TELL ME WHAT YOU WANT TO DO

job queue

Go to Pages and Tasks

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



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

← JOB QUEUE ENTRY CARD

Report · 70007605 · Shopify Create Sales Orders

Process Report **Actions** Navigate Less options

Job Queue ▾

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

Report ▾ Description Shopify Create Sales Orders

70007605 ... Earliest Start Date/Time

[Shopify Create Sales Orders](#) Status On Hold

Report Parameters

Report Request Page Opti... ☒ Printer Name

Report Output Type None (Processing only) ▾

Recurrence

Recurring Job ☐

Run on Mondays ☒ Run on Saturdays ☐

Run on Tuesdays ☒ Run on Sundays ☐

Run on Wednesdays ☒ Starting Time

Run on Thursdays ☒ Ending Time

Run on Fridays ☒ No. of Minutes between ...

Inactivity Timeout Period

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.



Order Processing

Shipping Cost Account 40100 ▾ Customer Template Code CUST000001 ▾

Auto Create Unknown Custom... ☒ **Shopify Order No. on Doc. Line** ☒


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 ······ <input type="checkbox"/>
	Created At ······ 11/21/2018 2:39 PM
	Document Date ······ 11/21/2018 
	Processed ······ <input type="checkbox"/>
	Financial Status ······ Paid
	Fulfillment Status ······ Fulfilled
	Sales Order No. ······ S-ORD101005
	Sales Invoice No. ······
	Error ······ <input type="checkbox"/>
	Error Message ······

Name ······	Riet Mondelaers
Address ······	Kempische steenweg 311
Address 2 ······	
Post Code ······	3500
City ······	Hasselt



SALES ORDER

S-ORD101005 · Riet Mondelaers

Process Report Posting Request Approval Actions Navigate Report Less options

General Show more

Customer Name: Riet Mondelaers Due Date: 12/21/2018

Contact: Requested Deliv...:

Posting Date: 4/9/2018 External Docume...:

Order Date: 4/9/2018 Shopify Order No.: 1242

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Comment		Shopify Order No.: 1242		
Item	1928-S	AMSTERDAM Lamp Blue		
G/L Account	40100	Standaard shipping		

Attachments Documents 0

Sell-to Customer Sales History

0	0	1
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
1	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

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.



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



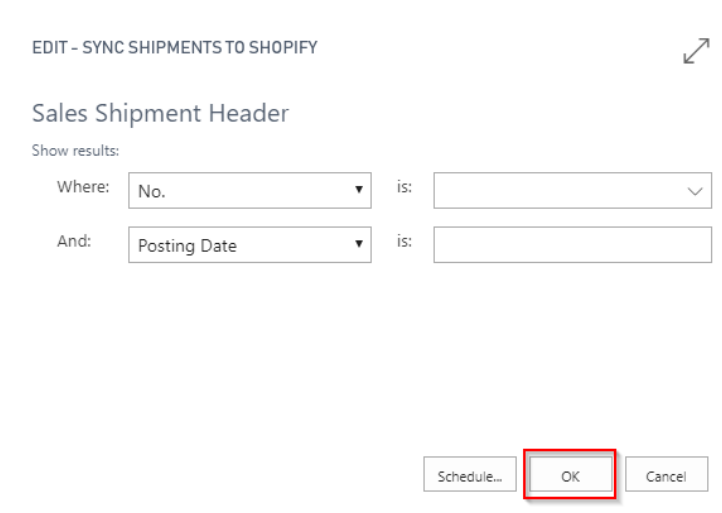
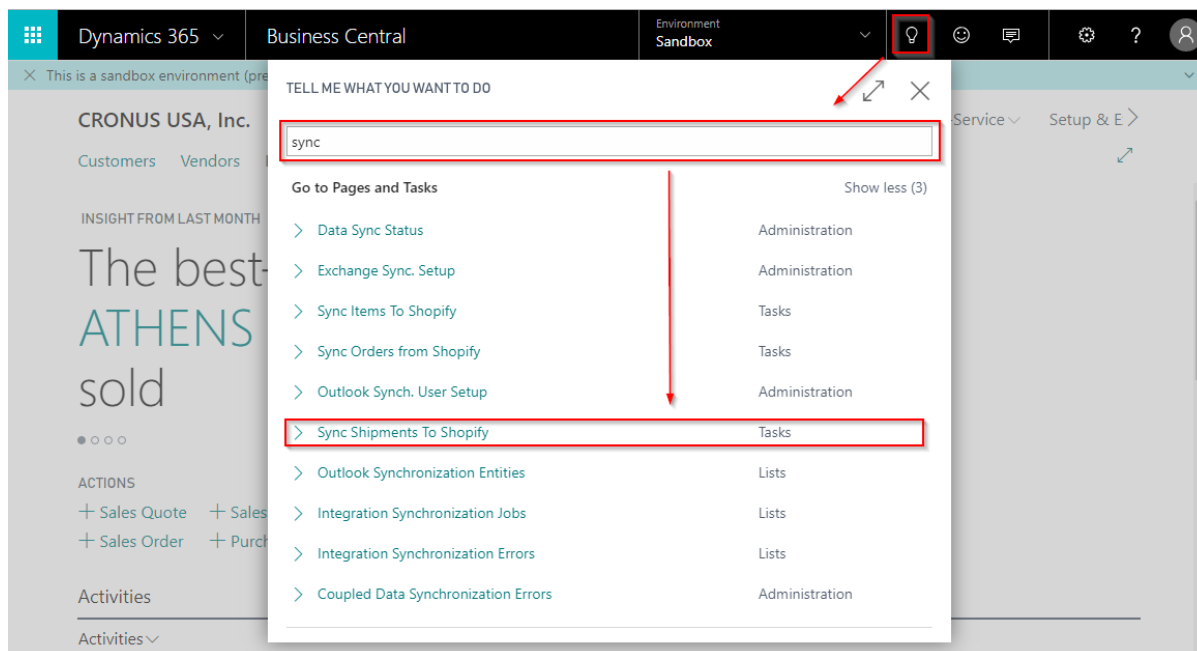
AMSTERDAM Lamp × 1
BLUE / PCS

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

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.

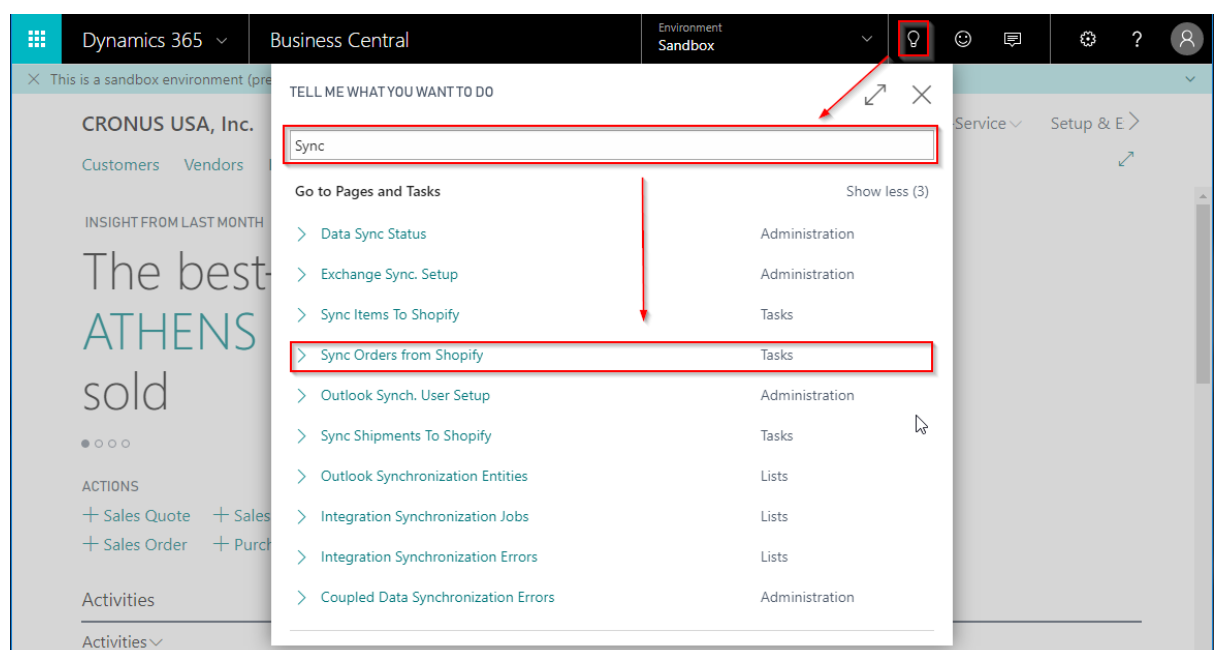
You can find the job queue entries by using the search function from the Role Center:



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

EDIT - SYNC ORDERS FROM SHOPIFY

Shopify Shop

Show results:

Where: is:

Open the Shopify Orders of the Shopify Shop

Dynamics 365 Business Central Environment Sandbox

CRONUS USA, Inc. Finance Cash Management Sales Purchasing Approvals Self-Service Setup & Extensions Intelligent Cloud Insights **Shopify**

Connector **Shops** Orders

← SHOPIFY SHOP CARD

TO SHOPIFY

Process **Navigate** Less options

←

Shopify Orders

SHOP CODE	SHOPIFY ORDER NO.	CL...	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	CREATED AT	CO...	FINANCI... STATUS	FULFILL... STATUS	TOTAL AMOUNT	PR
TO SHOPIFY	1237	<input type="checkbox"/>	C00020	Frank Auwers	19/10/2018 8:47	<input checked="" type="checkbox"/>	Paid		190,10	<input type="checkbox"/>
TO SHOPIFY	1238	<input type="checkbox"/>	C00020	Frank Auwers	19/10/2018 11:29	<input checked="" type="checkbox"/>	Paid		1 397,30	<input type="checkbox"/>
TO SHOPIFY	1239	<input type="checkbox"/>	C00010	Riet Mondelaers	14/11/2018 11:46	<input checked="" type="checkbox"/>	Paid		1 005,79	<input type="checkbox"/>
TO SHOPIFY	1240	<input checked="" type="checkbox"/>	C00010	Riet Mondelaers	14/11/2018 13:52	<input checked="" type="checkbox"/>	Paid	Fulfilled	1 005,79	<input checked="" type="checkbox"/>



←

JOB QUEUE ENTRY CARD

+

Report · 70007601 · Sync Shipments To Shopify

Process

Report

Actions

Navigate

Less options

Job Queue

Set Status to Ready

Set On Hold

Show Error

Restart

Report

70007601

Sync Shipments To Shopify

Description

Sync Shipments To Shopify

Earliest Start Date/Time

Status

On Hold

Report Parameters

Report Request Page Opti...

Printer Name

Report Output Type

None (Processing only)

Recurrence

Recurring Job

Run on Mondays

Run on Tuesdays

Run on Wednesdays

Run on Thursdays

Run on Fridays

Run on Saturdays

Run on Sundays

Starting Time

Ending Time

No. of Minutes between ...

Inactivity Timeout Period



6. Troubleshooting

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

General

Code	DEFAULT	Shopify Shop Location Id	
Shopify URL	https://scaptapoc.myshopify.com	Language Code	ENU
API Key	10053097863	Log Activated	<input checked="" type="checkbox"/>
Password	*****		

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

HOME ACTIONS

VIEW - SHOPIFY LOG ENTRIES

Entry No.	Date and Time	Time	User ID	URL	Method	Status Code	Status Description
1	3/10/2017 10:52 AM	10:52:51 AM	ADMIN	https://scaptapoc.myshopify.com/admin/products/10053_PUT		OK	OK

VIEW - SHOPIFY LOG ENTRY

1

Algemeen

Entry No.	1	URL	https://scaptapoc.myshopify.com/admin/products/10053097863.xml
Date and Time	3/10/2017 10:52 AM	Method	PUT
Time	10:52:51 AM	Status Code	OK
User ID	ADMIN	Status Description	OK

Data

Request

```
{ "product": { "id": "10053097863", "title": "ATHENS Desk", "product_type": "Assorted Tables", "published_scope": "web", "published": true, "variants": [] } }
```

Response

```
<?xml version="1.0" encoding="UTF-8"?><product><id type="integer">10053097863</id><title>ATHENS Desk</title><body-html nil="true"/><vendor>Scapta</vendor><product-type>Assorted
```

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