



## 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/>.

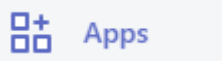
More information about how to create and personalize your Shopify store can be found at <https://help.shopify.com/>.

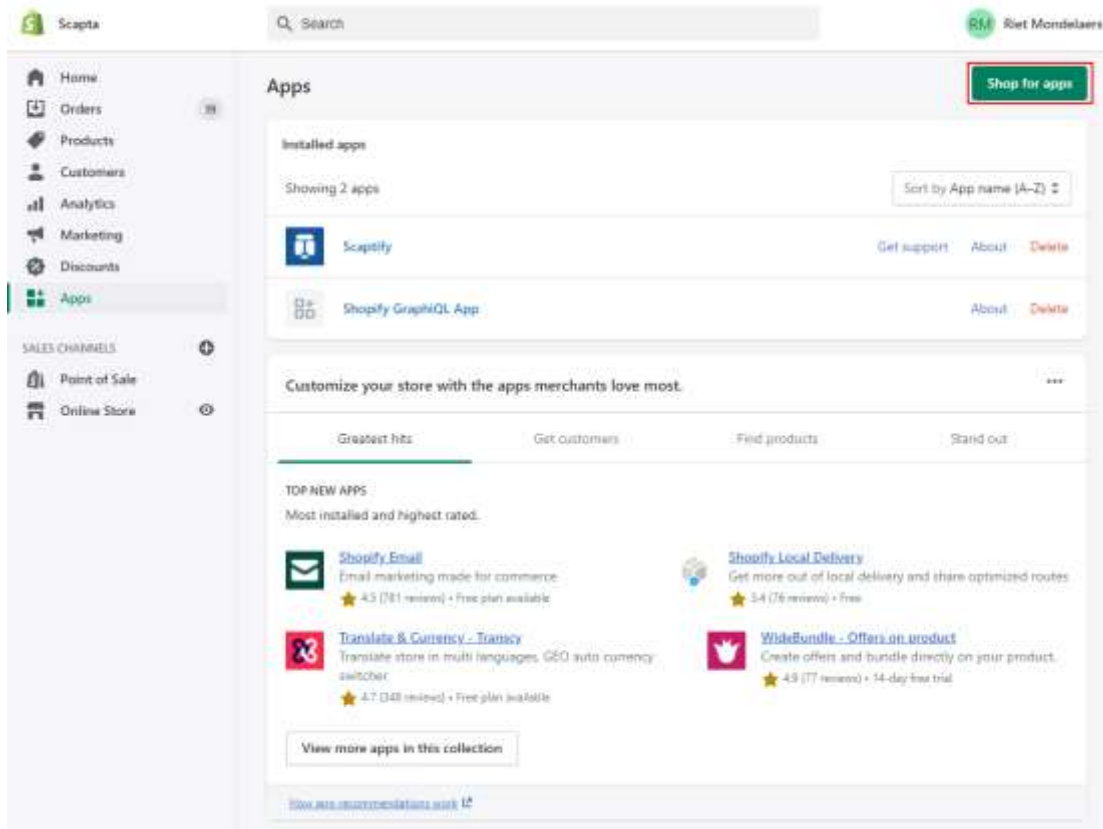
#### 2.1.2 Configure Shopify Account

##### 2.1.2.1 Install the Scaptify app

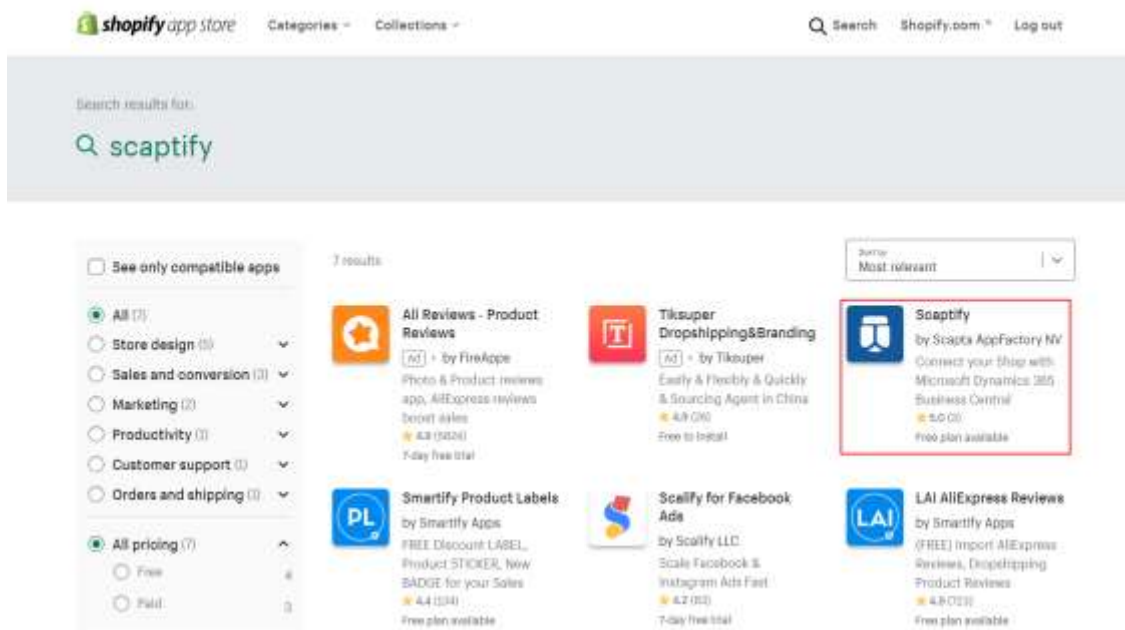
In order to allow Microsoft Dynamics 365 Business Central to securely connect to Shopify, you need to install the Scaptify app. It will create application credentials in Shopify that Microsoft Dynamics 365 Business Central will use to connect to Shopify.

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'

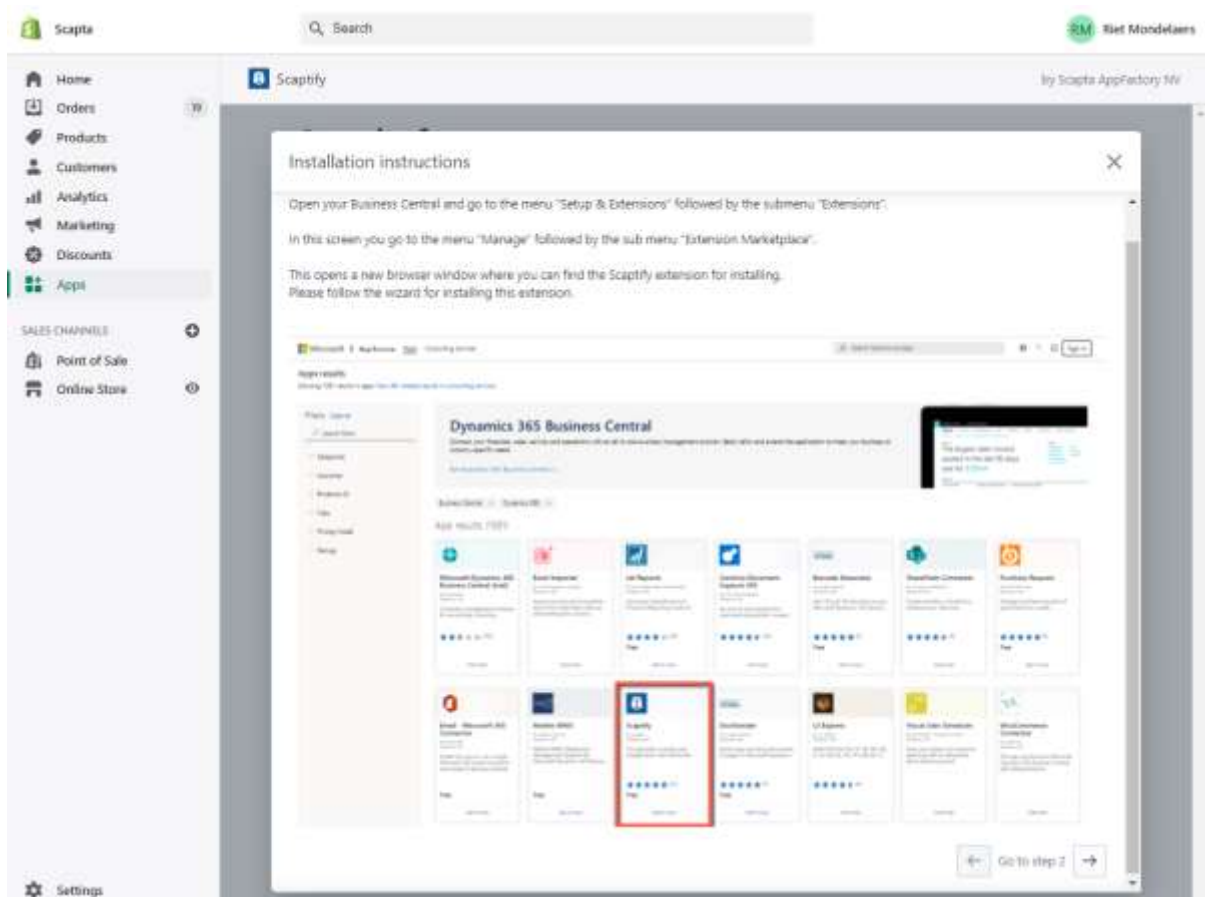




The screenshot shows the Shopify App Store interface. At the top, there is a navigation bar with the 'shopify app store' logo, 'Categories', 'Collections', a search bar, 'Shopify.com', and 'Log out'. Below this, the app card for 'Scaptify' is displayed. It features the Scapta logo, the text 'Scaptify by Scapta AppFactory NV', and a description: 'Connect your Shop with Microsoft Dynamics 365 Business Central'. The app has a 5.0 star rating from 3 reviews. A green 'Add app' button is highlighted with a red box. Below the button, it states 'Free plan available. Additional charges may apply.'

The screenshot shows the Scapta app interface within a Shopify admin. The left sidebar contains navigation options: Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels (Point of Sale, Online Store), and Settings. The main content area displays a 'Good afternoon' greeting and the Scapta app icon. Below the icon, there is a section titled 'Scaptify' with a plus sign icon. The text reads: '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...'. A note below states: '(\*) keeping in mind mistakes are avoided, customer created, syncing articles is done'. A blue button labeled 'Installation instructions' is highlighted with a red box. Below this, there is a 'Current progress' section with a progress bar and the text: 'You are currently at 0 / 30 of your included orders.' A blue button labeled 'Update plan' is highlighted with a red box at the bottom right.

Choose **'Installation instructions'** to see how you need to install Scapta 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.



**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 included  | +\$0.33 per additional order |
| S    | \$99  | 300 orders included  | +\$0.20 per additional order |
| M    | \$149 | 1000 orders included | +\$0.10 per additional order |
| L    | \$299 | 3000 orders included | +\$0.05 per additional order |

Orders per month: **Between 100 and 300** (selected), Between 250 and 700, Between 700 and 1500, Between 1500 and 3000, Between 3000 and 10000, Between 10000 and 50000

### Special Monthly Plans

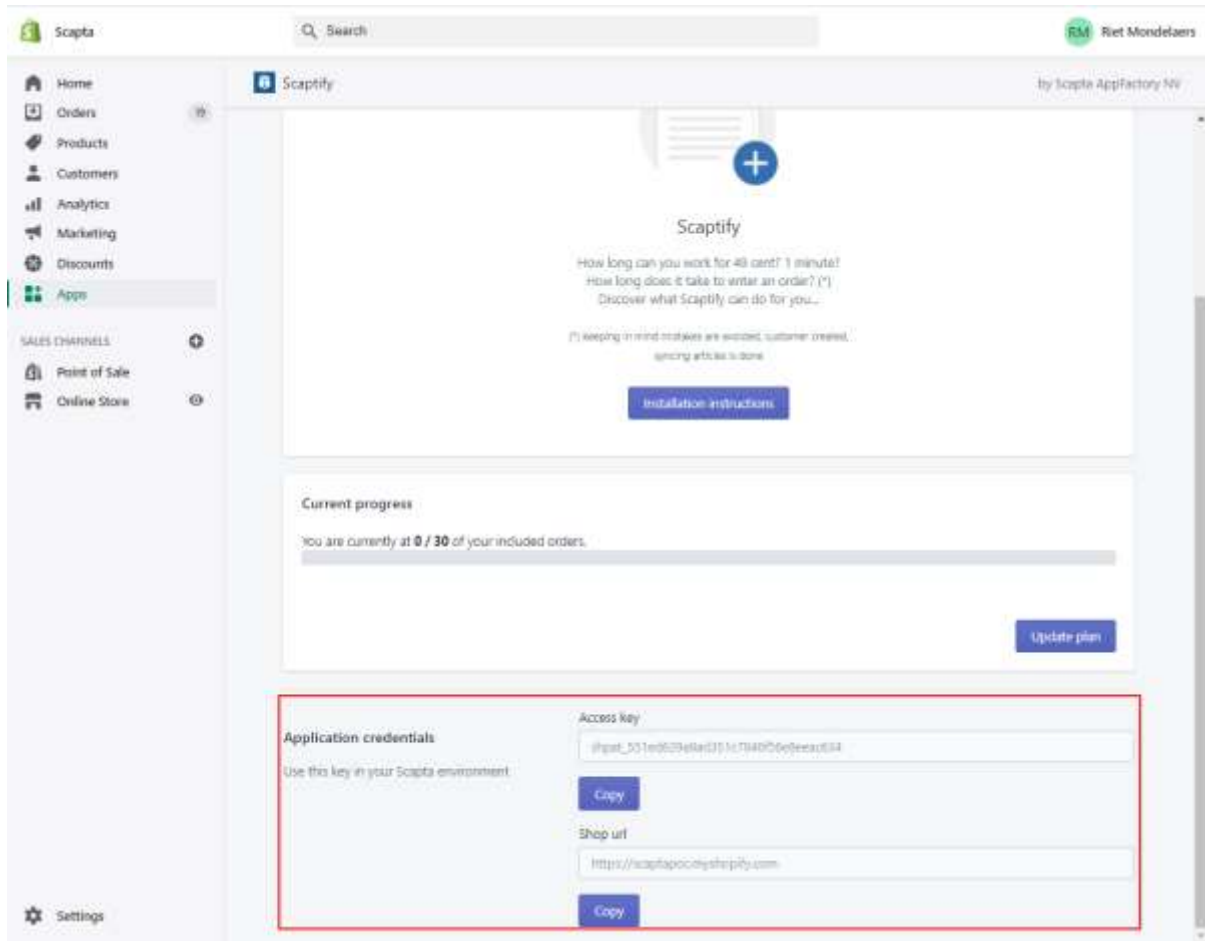
If you are just starting with your business you can select Freemium or Pay & Go. If you only want to sync Products and Customers, select Essentials. The Sandbox plan can be used towards Sandbox Environments in Microsoft Dynamics 365 Business Central for demo and testing purposes only. The Sandbox plan 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 | +\$0.0 per additional order  |
| Sandbox    | \$0   | 30 orders included                                 | +\$0.99 per additional order |

I have a code



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



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

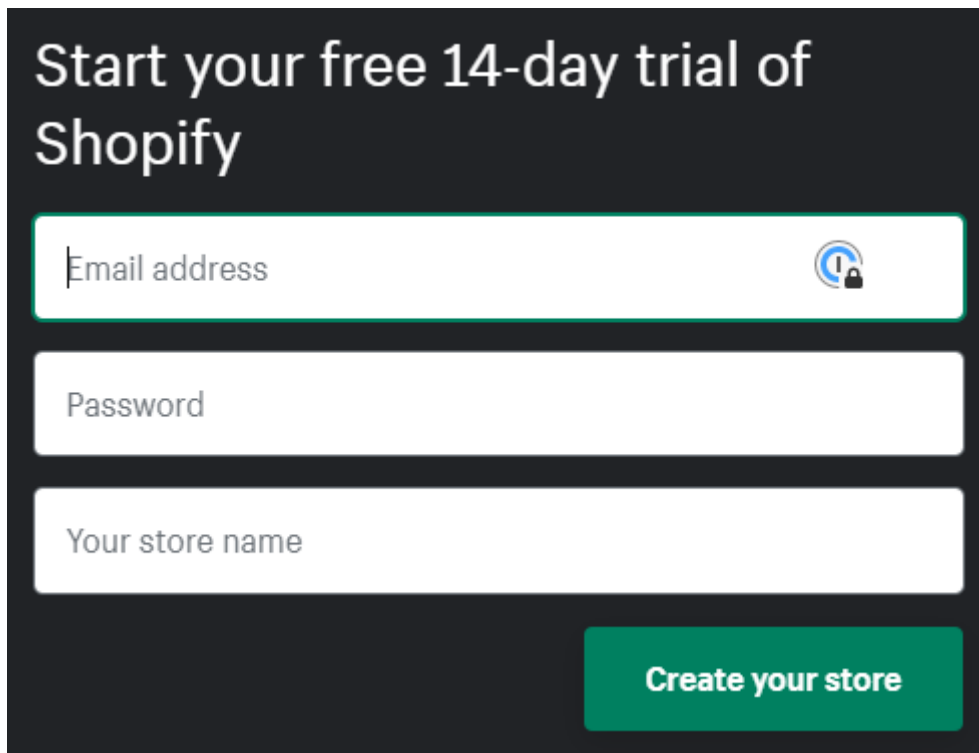


## 2.2 Shopify POS

### 2.2.1 Create Shopify POS Account

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

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



The screenshot shows a dark-themed sign-up form for Shopify. At the top, it says "Start your free 14-day trial of Shopify". Below this are three input fields: "Email address" (with a lock icon), "Password", and "Your store name". A green button labeled "Create your store" is positioned at the bottom right of the form.

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

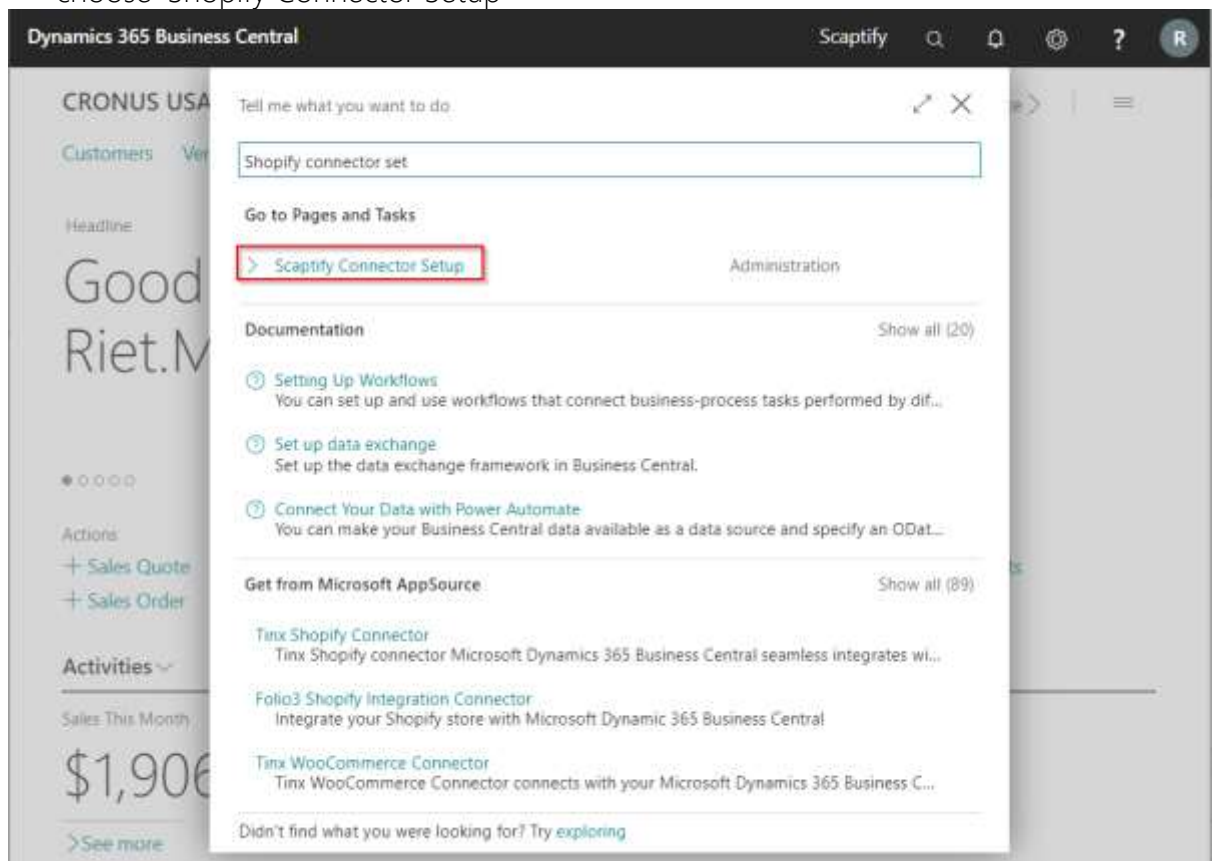


## 2.3 Microsoft Dynamics 365 Business Central

### 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.

Back Next Finish

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

SCAPTIFY REGISTRATION

IF YOU HAVE A LICENCE KEY

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

PLEASE COMPLETE THE PAGE BELOW TO REGISTER THE SCAPTIFY CONNECTOR.

Name ..... My Company

Address ..... Kempische Steenweg 293 bus 38

Address 2 .....

Post Code ..... 3500

City ..... Hasselt

County .....

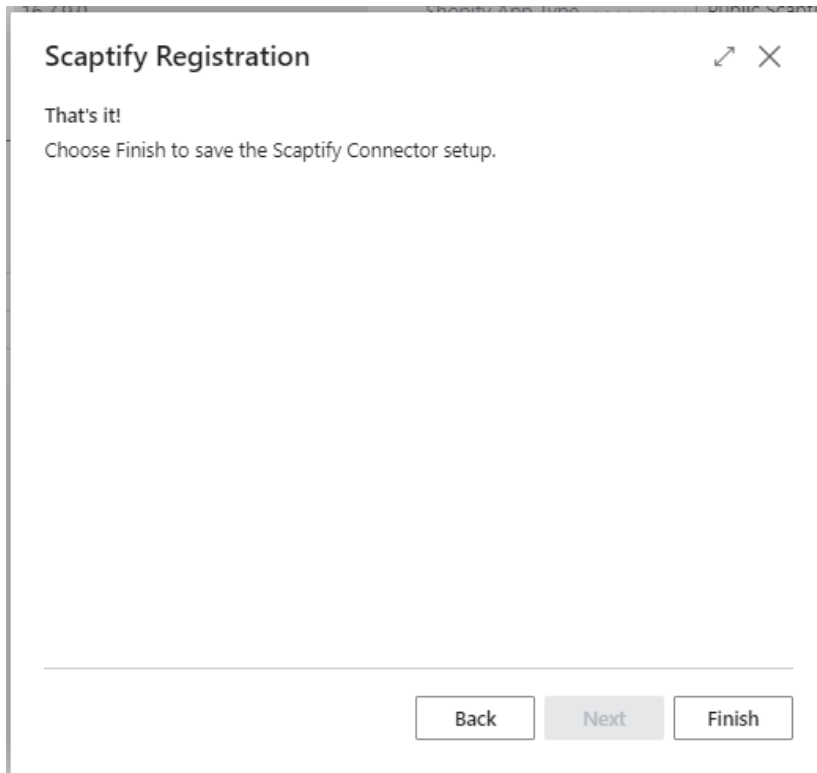
Country/Region Code ..... BE

VAT Registration No. ....

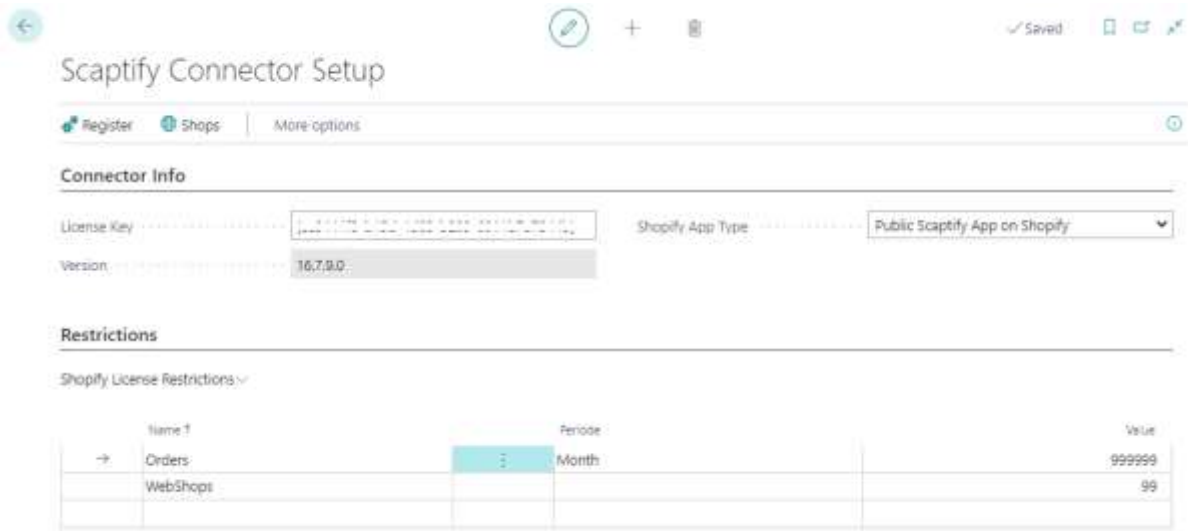
Back Next Finish



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



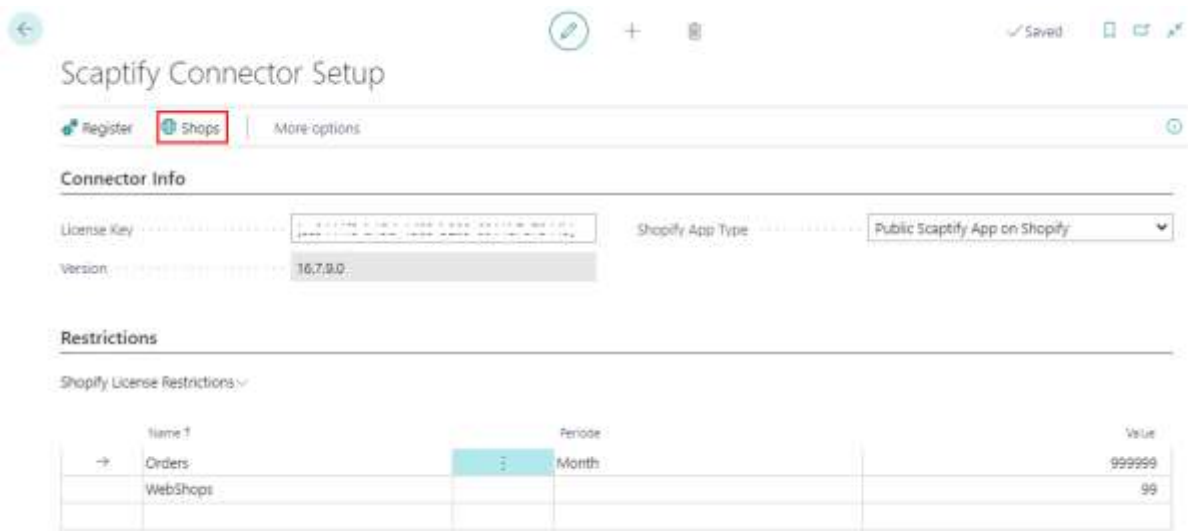
- You can consult your license key and restrictions in the Shopify Connector Setup page.



### 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'.



- Or follow the path 'Scaptify > Shops'



Link your Shopify Shop.

A screenshot of the SCAPTAPOC configuration page in Dynamics 365 Business Central. The page title is 'SCAPTAPOC'. Below the title, there are tabs for 'New', 'Synchronization', 'Actions', 'Related', and 'Fewer options'. The 'General' section contains the following fields:

- Code: SCAPTAPOC
- Language Code: ENU
- Shopify URL: https://scaptapoc.myshopify.com
- Shopify Access Key: . \_
- Log Activated:
- Allow Background Syncs:

Below the 'General' section, there are expandable sections for 'Item Synchronization', 'Inventory Synchronization', 'Customer Synchronization', and 'Order Processing'.

- Enter a Code for your Shopify Shop.
- Enter the URL of your Shopify Store, together with the Shopify Access Key. 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                   | From Shopify                        | ▼ | Sync Item Extended Text     | <input checked="" type="checkbox"/> |
| Auto Create Unknown Items   | <input checked="" type="checkbox"/> |   | Sync Item Attributes        | <input checked="" type="checkbox"/> |
| Shopify Can Update Items    | <input checked="" type="checkbox"/> |   | Variant Prefix              | V_                                  |
| Can Update Shopify Products | <input type="checkbox"/>            |   | SKU Type                    | Item No. + Variant Code             |
| Item Template Code          | ITEM000001                          | ▼ | SKU Field Separator         | /                                   |
| Customer Price Group        | WEBSHOP                             | ▼ | Create Product Status Value | Active                              |
| Customer Discount Group     | WEBSHOP                             | ▼ | Remove Product Action       |                                     |
| Sync Item Images            | From Shopify                        | ▼ |                             |                                     |

- Select how you want to sync your items
  - From Dynamics 365 Business Central to Shopify
  - From Shopify to Dynamics 365 Business Central
- Select if you automatically want to create unknown items.
- Select the Item template you want to use to create the items
- Define if you only want to create or also update items.
- Select if you want to sync images, extended texts, item attributes
- Select if and how you want to create variants and stock keeping units in Business Central.
- Decide what status products should have in Shopify when creating or deleting products in Business Central.

#### Inventory Synchronization

|                    |                          |                          |          |
|--------------------|--------------------------|--------------------------|----------|
| Inventory Trackout | <input type="checkbox"/> | Default Inventory Policy | 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  | 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              | C00010                              | Contact Source               | First Name and Last Name            |
| Shopify Can Update Customers  | <input checked="" type="checkbox"/> | County Source                | 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

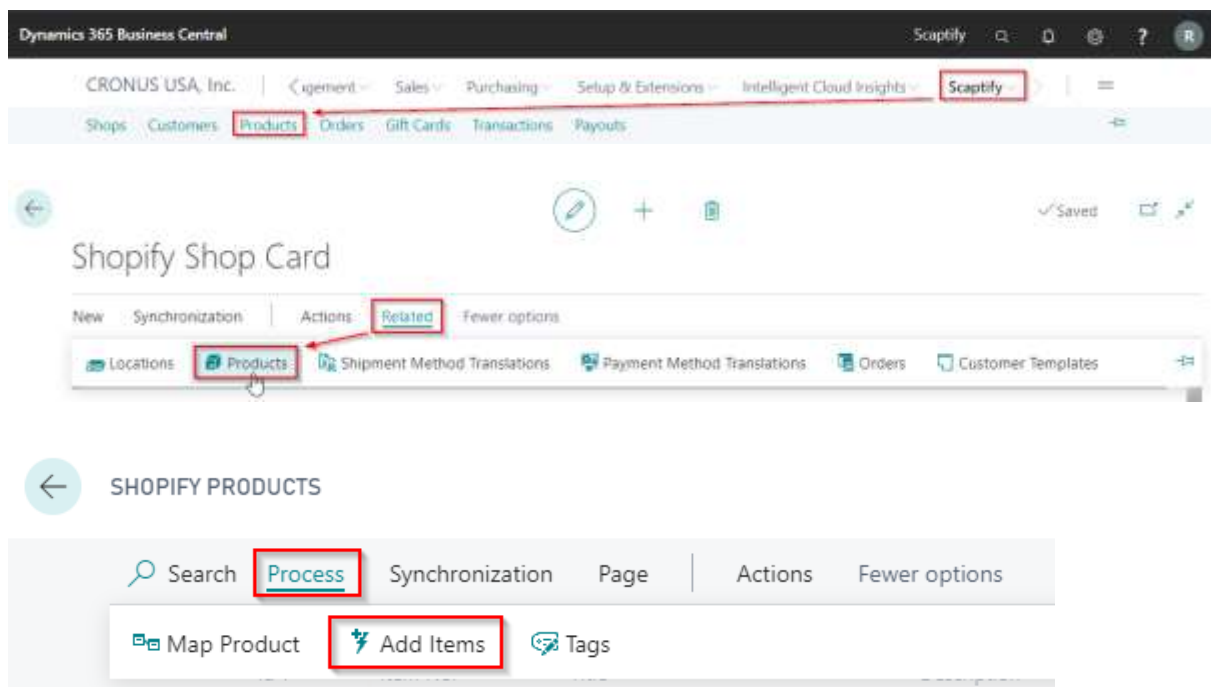
##### 3.1.1 Setup Items to synchronize

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.

- **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.





SHOPIFY ADD ITEM TO SHOPIFY

GroupName

ShopCode ..... SCAPTAPOC

Filter: Item

× No. .... 192\*

+ Filter...

Filter totals by:

+ Filter...

Schedule... OK Cancel

The screenshot shows a software interface with a table of items and a sidebar. The table has columns for 'id', 'name', 'description', 'unit', 'quantity', 'price', and 'status'. The sidebar on the right is titled 'Item Details - Incoming' and shows various fields like 'Item No.', 'Quantity', 'Unit Price', and 'Total Price'.

Remark: Items are automatically created in Shopify if you add items. In 'Id' you can see the Shopify-id.



## Scaptify Shopify Connector User Guide

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In this overview, you can see the **status** of the products. The status depends on the setting you have made in your Shopify Shop for 'Create Product Status Value'. You can change the status in this overview. The status will be automatically changed in Shopify. If you delete an item in the 'Shopify Products' Page, the status in Shopify will be adjusted based on the settings in the field 'Remove Product Action' in the Shopify Shop.

You can find two fields for Search Engine Optimization (**SEO**), namely 'SEO Title' and 'SEO Description'. Filling in this fields automatically syncs them to Shopify.

At the bottom of the screen, you can find the variants of the selected product.

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 | Work Date: 4/12/2021

Search Edit List Delete **Process** Synchronization Page More options

Map Product Add Items **Tags**

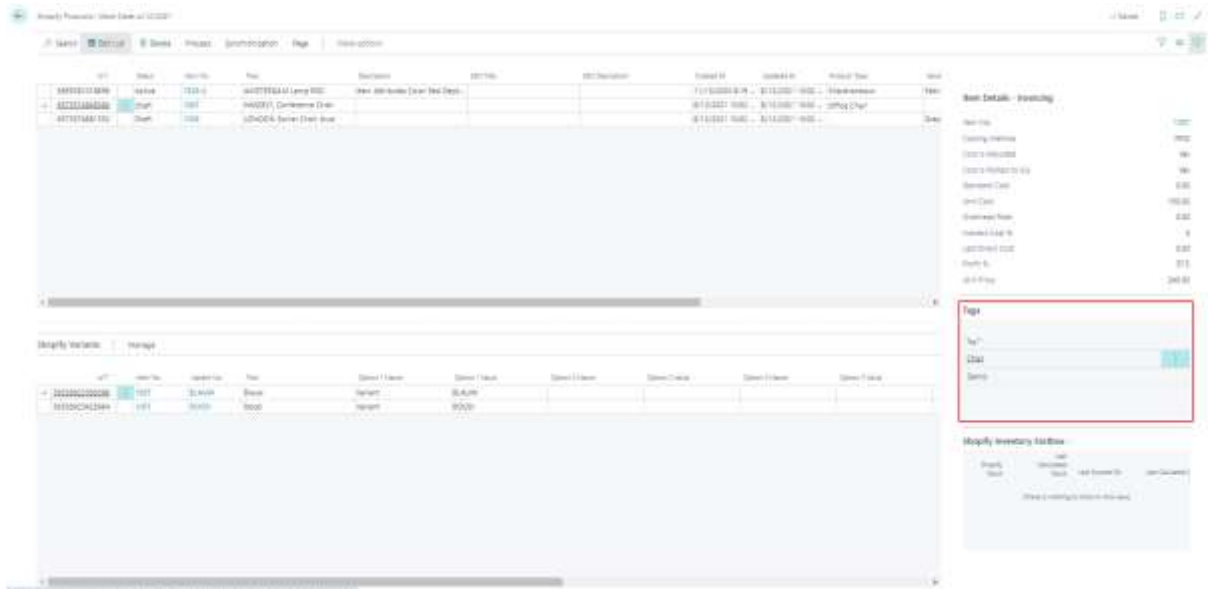
|   |               |        |        |                           |                                   |
|---|---------------|--------|--------|---------------------------|-----------------------------------|
|   | 5859381018696 | Active | 1928-S | AMSTERDAM Lamp RED        | Item Attributes Color Red Dept... |
| → | 6573574848584 | Draft  | 1007   | HASSELT, Conference Chair |                                   |
|   | 6573574881352 | Draft  | 1008   | LONDON Swivel Chair, blue |                                   |

### Edit - Shopify Tags

Search + New Edit List Delete Page

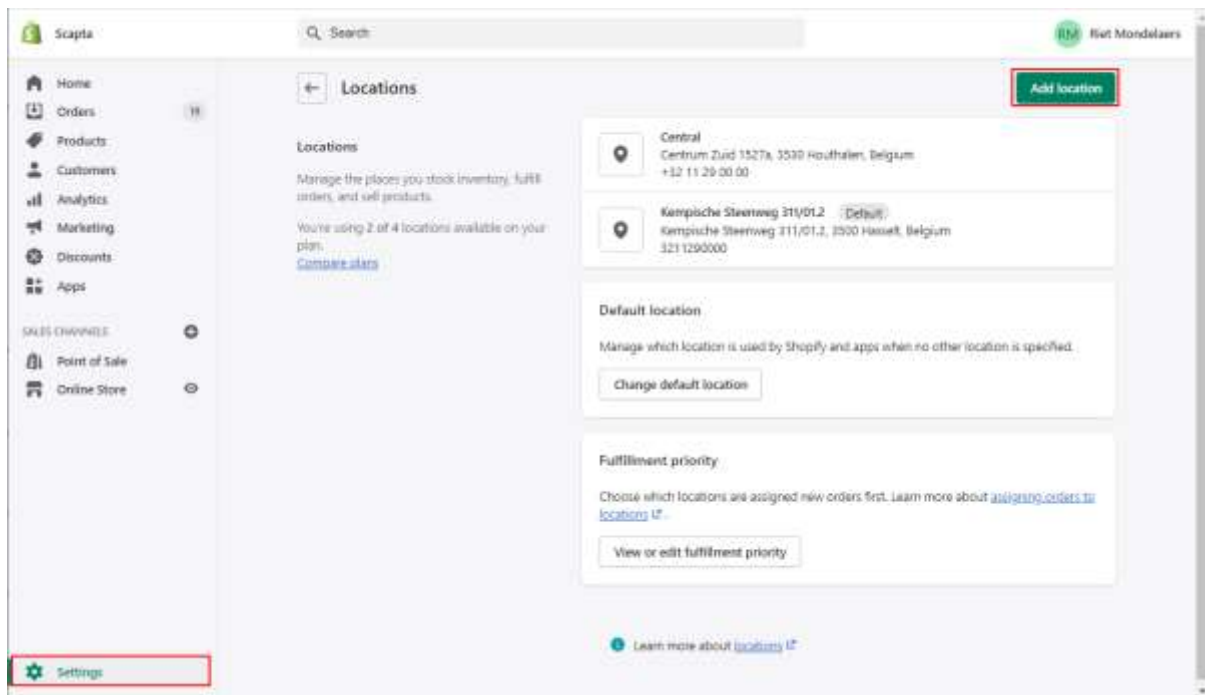
Entry No. 1

|   |       |  |
|---|-------|--|
|   | Demo  |  |
| → | Chair |  |
|   |       |  |



### 3.1.2 Setup locations

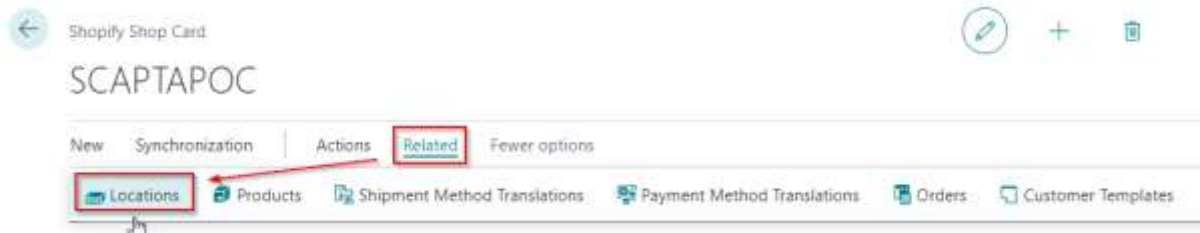
In Shopify you can define more than one location via 'Settings' > 'Locations'.



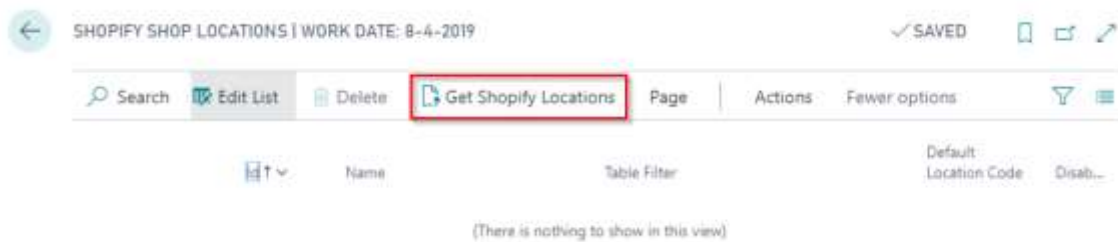


These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations

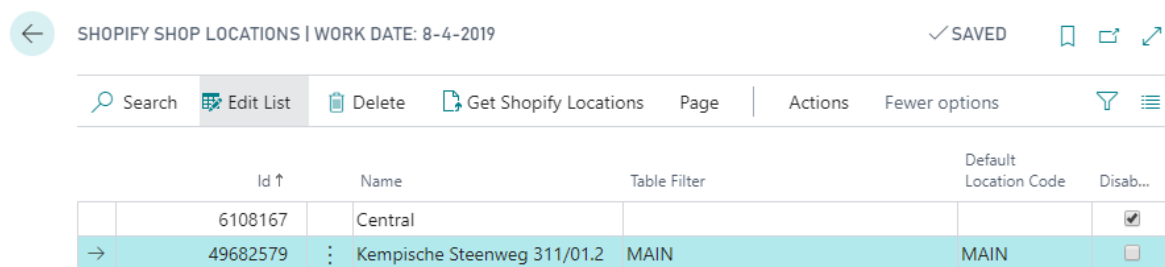


Use the function 'Get Shopify Locations' to get the locations from Shopify.



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

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



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

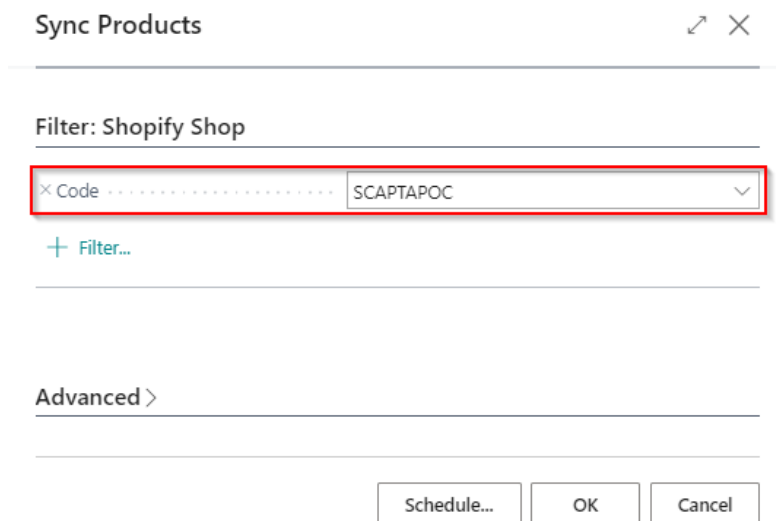
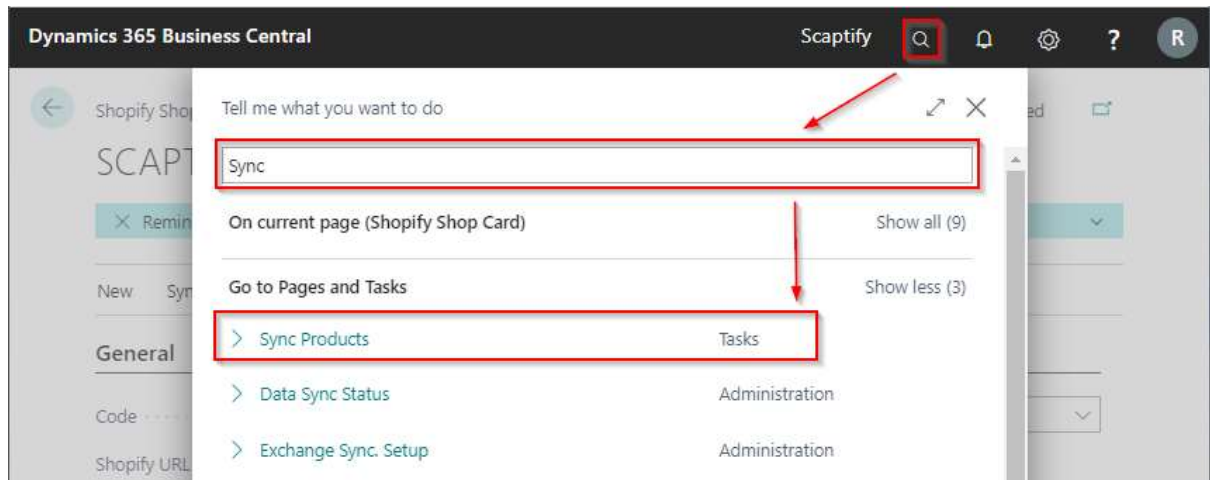
### 3.1.3 Execute Item Synchronization





### 3.1.3.1 By batch task

In the Role center, use the search function to find the task "Sync products":

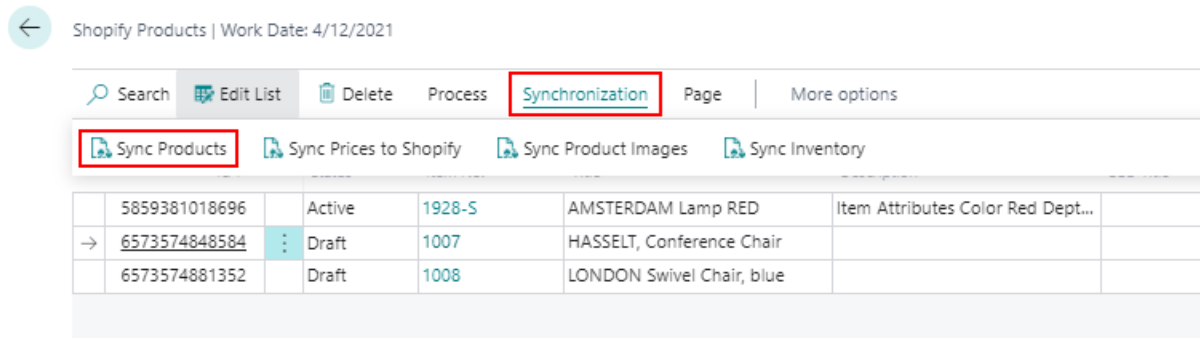


When executing this task, the configured items are synchronized to your Shopify account.

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

### 3.1.3.2 By action 'Sync'

When you navigate to 'Products' on your Shopify Shop Card, you can execute the function 'Sync Products' to synchronize the items to your Shopify Account. Only the updated products and fields are synchronized.



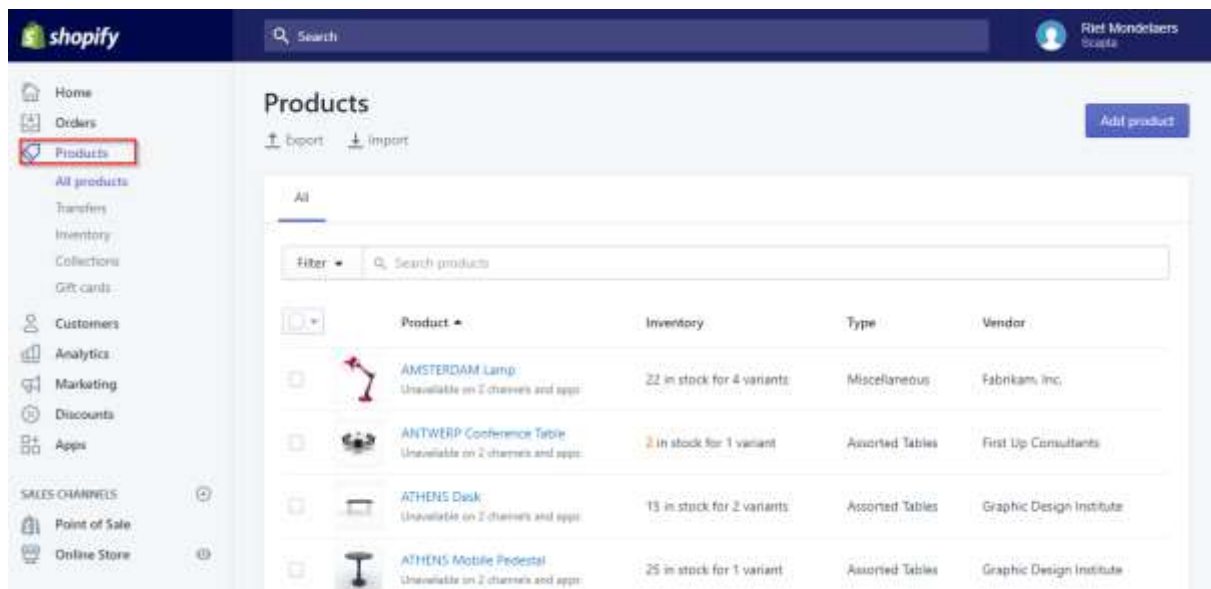
← Shopify Products | Work Date: 4/12/2021

Search Edit List Delete Process **Synchronization** Page More options

**Sync Products** Sync Prices to Shopify Sync Product Images Sync Inventory

| ID              | Status | SKU    | Name                      | Attributes                        |
|-----------------|--------|--------|---------------------------|-----------------------------------|
| 5859381018696   | Active | 1928-S | AMSTERDAM Lamp RED        | Item Attributes Color Red Dept... |
| → 6573574848584 | Draft  | 1007   | HASSELT, Conference Chair |                                   |
| 6573574881352   | Draft  | 1008   | LONDON Swivel Chair, blue |                                   |

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



shopify Search Riet Mondelaers Scapta

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

### Products

Export Import Add product

All filter Search products

| Product  | Inventory                  | Type            | Vendor                   |
|--|----------------------------|-----------------|--------------------------|
| AMSTERDAM Lamp<br>Unavailable on 2 channels and apps           | 22 in stock for 4 variants | Miscellaneous   | Fabrikam, Inc.           |
| ANTWERP Conference Table<br>Unavailable on 2 channels and apps | 2 in stock for 1 variant   | Assorted Tables | First Up Consultants     |
| ATHENS Desk<br>Unavailable on 2 channels and apps              | 13 in stock for 2 variants | Assorted Tables | Graphic Design Institute |
| ATHENS Mobile Pedestal<br>Unavailable on 2 channels and apps   | 25 in stock for 1 variant  | Assorted Tables | Graphic Design Institute |



< Products

### ATHENS Desk

Duplicate View Promote

Title: ATHENS Desk

Description: This is a desk. This desk is black.

Item Attributes

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

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: Desk, Athens

Images: Add image from URL Add images

Variants

Select: All None BLACK WHITE PCS

| Item Variant | Item Unit of Measure | Inventory | Price    | SKU    |
|--------------|----------------------|-----------|----------|--------|
| BLACK        | PCS                  | 5         | €1.000,8 | 1896-S |
| WHITE        | PCS                  | 10        | €1.000,8 | 1896-S |



### 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.

← Shopify Products | Work Date: 4/12/2021

Search Edit List Delete Process **Synchronization** Page More options

Sync Products Sync Prices to Shopify **Sync Product Images** Sync Inventory

|                 |        |        |                           |                                   |
|-----------------|--------|--------|---------------------------|-----------------------------------|
| 5859381018696   | Active | 1928-S | AMSTERDAM Lamp RED        | Item Attributes Color Red Dept... |
| 6573574848584   | Draft  | 1007   | HASSELT, Conference Chair |                                   |
| → 6573574881352 | Draft  | 1008   | LONDON Swivel Chair, blue |                                   |
| 657357797704    | Draft  | TEST   | Test Draft                |                                   |

### 3.1.3.4 Sync Prices to Shopify

Once you've updated your prices in Dynamics 365 Business Central, you can only synchronize prices to Shopify using the 'Sync Prices to Shopify' function on the 'Shopify Products' page.

← Shopify Products | Work Date: 4/12/2021

Search Edit List Delete Process **Synchronization** Page More options

Sync Products **Sync Prices to Shopify** Sync Product Images Sync Inventory

|                 |        |        |                           |                                   |
|-----------------|--------|--------|---------------------------|-----------------------------------|
| 5859381018696   | Active | 1928-S | AMSTERDAM Lamp RED        | Item Attributes Color Red Dept... |
| 6573574848584   | Draft  | 1007   | HASSELT, Conference Chair |                                   |
| → 6573574881352 | Draft  | 1008   | LONDON Swivel Chair, blue |                                   |
| 657357797704    | Draft  | TEST   | Test Draft                |                                   |

Remark: The price taken follows the standard price calculation of Dynamics 365 Business Central. The lowest valid price is taken.



### 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.

- **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.

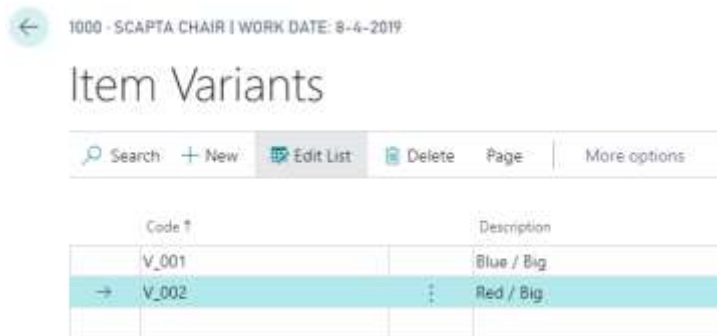


### Item Synchronization

|                             |                                     |                             |                          |
|-----------------------------|-------------------------------------|-----------------------------|--------------------------|
| Sync Item                   | From Shopify                        | Sync Item Extended Text     | <input type="checkbox"/> |
| Auto Create Unknown Items   | <input checked="" type="checkbox"/> | Sync Item Attributes        | <input 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         | /                        |
| Customer Price Group        | WEBSHOP                             | Create Product Status Value | Draft                    |
| Customer Discount Group     | WEBSHOP                             | Remove Product Action       | Status to Archived       |
| 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.

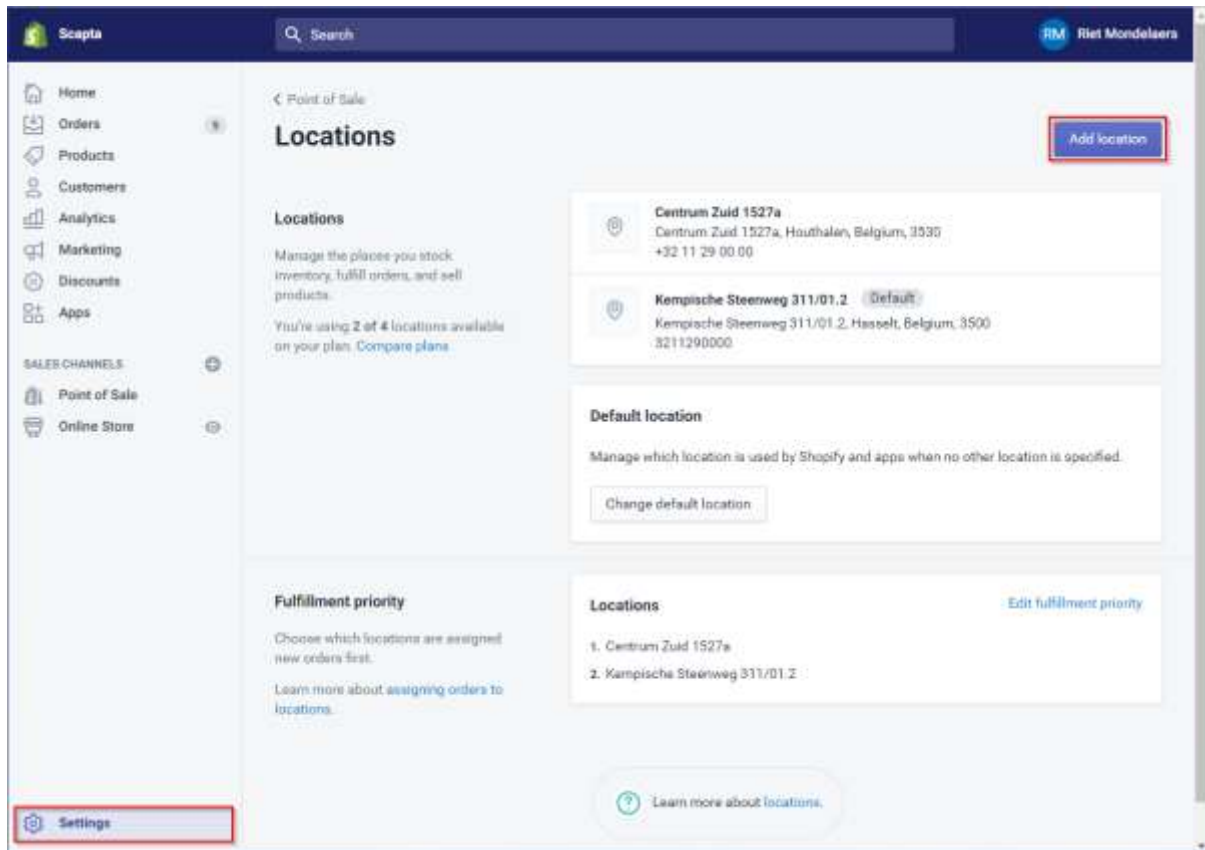
- **SKU Field Separator**

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'.

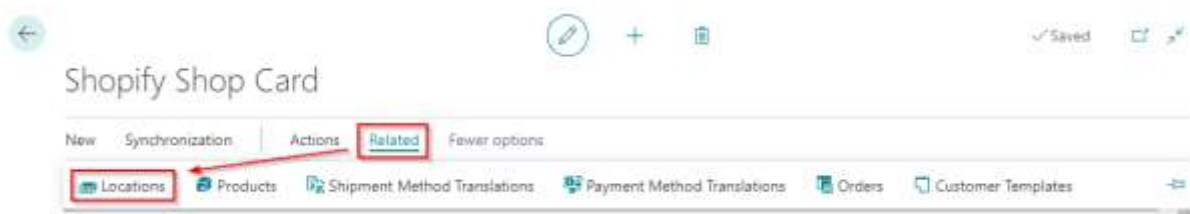
### 3.2.2 Setup locations

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



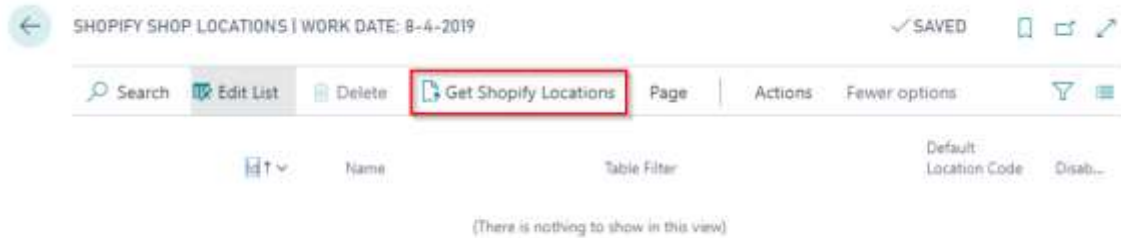
These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations



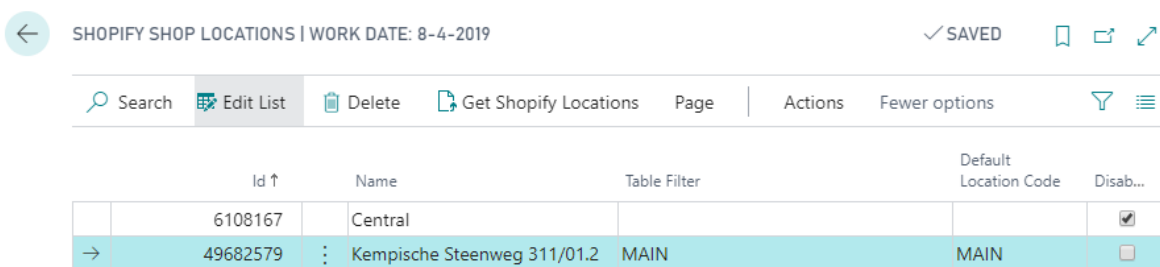
Use the function 'Get Shopify Locations' to get the locations from Shopify.





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

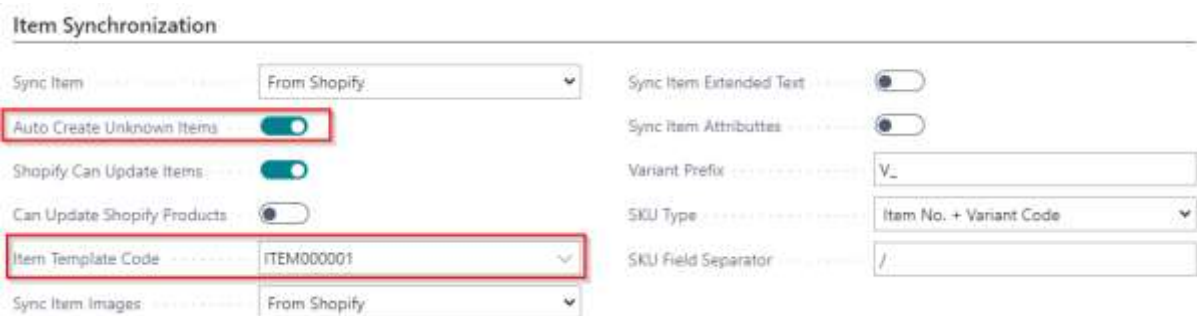
- Table filter: determines the location(s) for which the stock must be counted.
- Default location: determines the location to be used in the orders.



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

### 3.2.3 Setup to automatically create unknown items

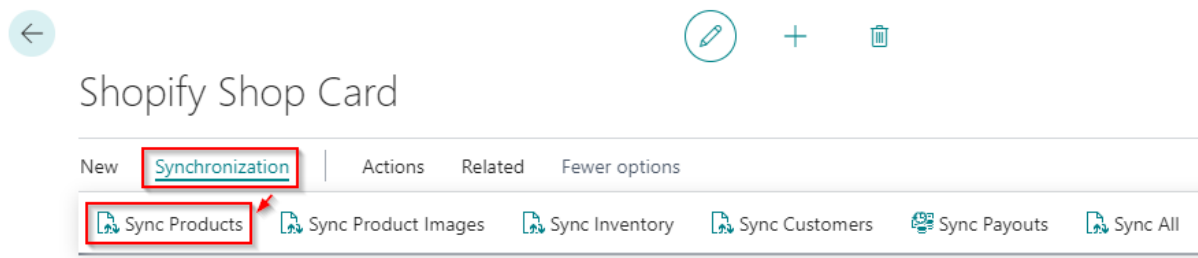
On the tab 'Item Synchronization' of the Shopify Shop Card, you can indicate to automatically create unknown items from Shopify into Dynamics 365 Business Central based on an item template.





### 3.2.4 Execute Item Synchronization

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



Shopify Products | Work Date: 4/12/2021

| Id ↑          | Status | Item No. | Title                     | Description                        | SEO Title |
|---------------|--------|----------|---------------------------|------------------------------------|-----------|
| 5859380854856 | Active | 1900-S   | PARIS Guest Chair, black  | Item Attributes Color Black De...  |           |
| 5859380887624 | Active | 1906-S   | ATHENS Mobile Pedestal    | Item Attributes Color Black De...  |           |
| 5859380920392 | Active | 1908-S   | LONDON Swivel Chair, blue | Item Attributes Color Blue Dept... |           |
| 5859380953160 | Active | 1920-S   | ANTWERP Conference Table  | Item Attributes Color White De...  |           |
| 5859380985928 | Active | 1925-W   | Conference Bundle 1-6 T   |                                    |           |

#### 3.2.4.1 Sync product images

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

Shopify Products | Work Date: 4/12/2021

| Id ↑          | Status | Item No. | Title                   | Description                        | SEO Title |
|---------------|--------|----------|-------------------------|------------------------------------|-----------|
| 5859381149768 | Active | 1960-S   | ROME Guest Chair, green | Item Attributes Color Green De...  |           |
| 5859381182536 | Active | 1964-S   | TOKYO Guest Chair, blue | Item Attributes Color Blue Dept... |           |
| 5859381215304 | Active | 1965-W   | Conference Bundle 2-8   |                                    |           |



## 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

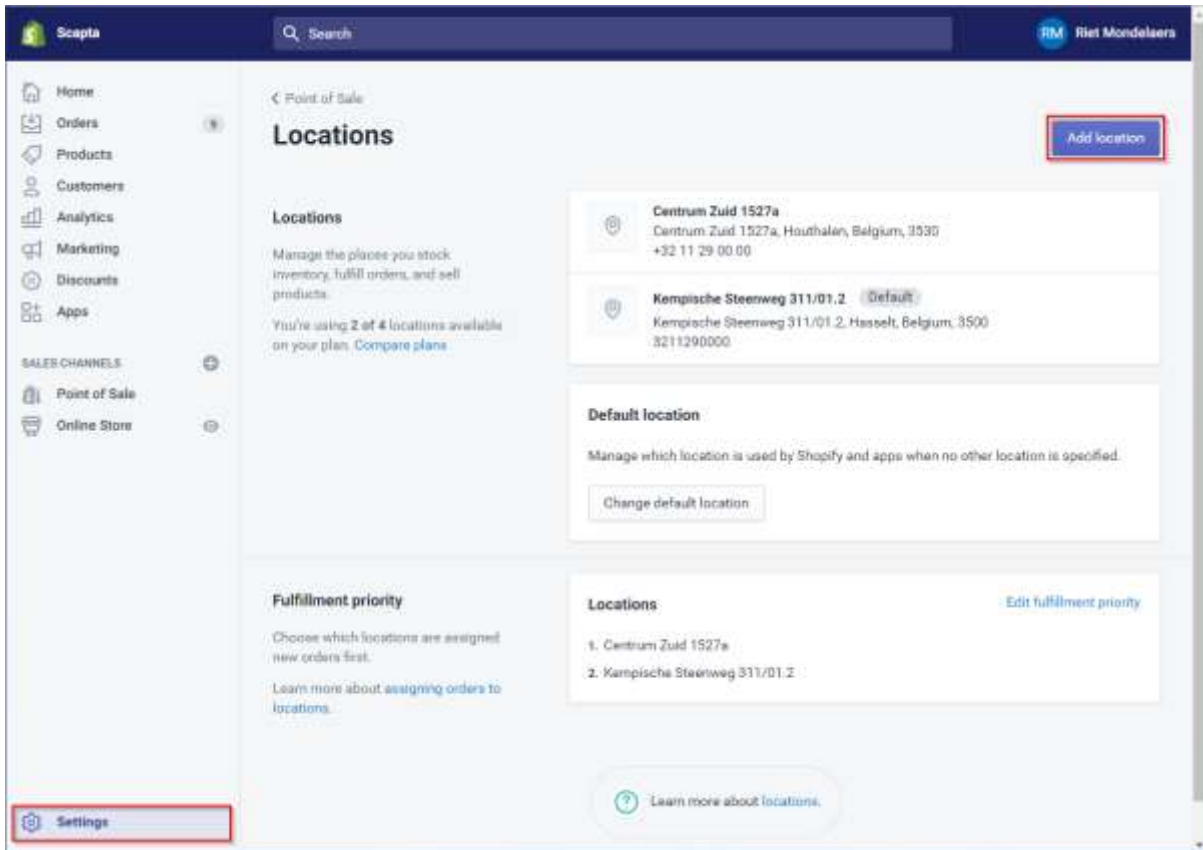
On the tab 'Inventory Synchronization' of the Shopify Shop Card, you can enter to sync inventory.



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

### 4.2 Setup locations

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

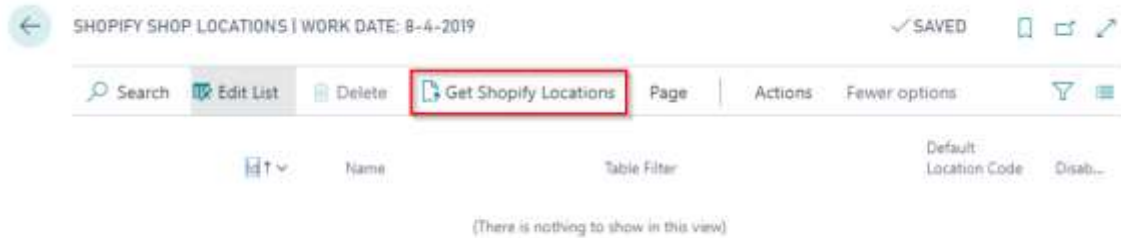


These locations need to be available in Microsoft Dynamics 365 Business Central.

On the Shopify Shop Card: Process > Locations



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



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

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

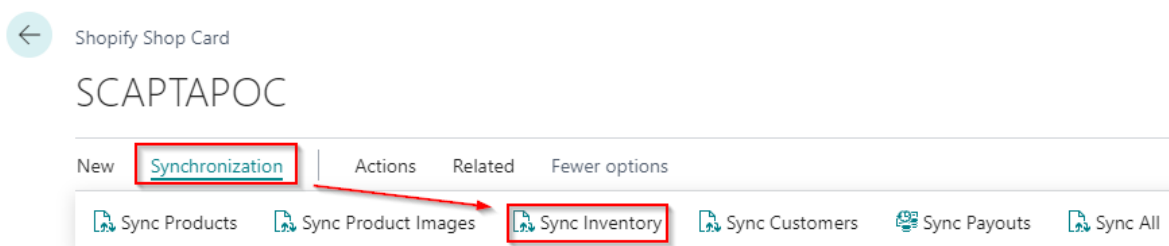
| Id ↑       | Name                          | Table Filter | Default Location Code | Disab...                            |
|------------|-------------------------------|--------------|-----------------------|-------------------------------------|
| 6108167    | Central                       |      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

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

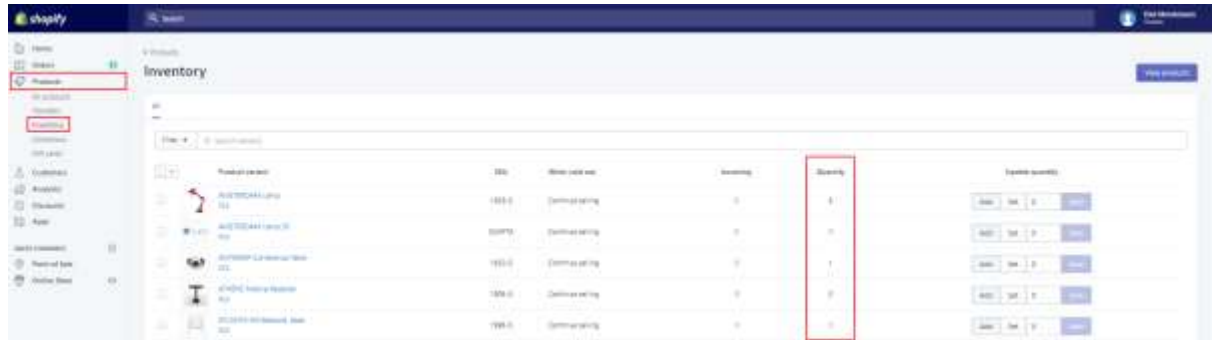
### 4.3 Execute stock synchronization

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

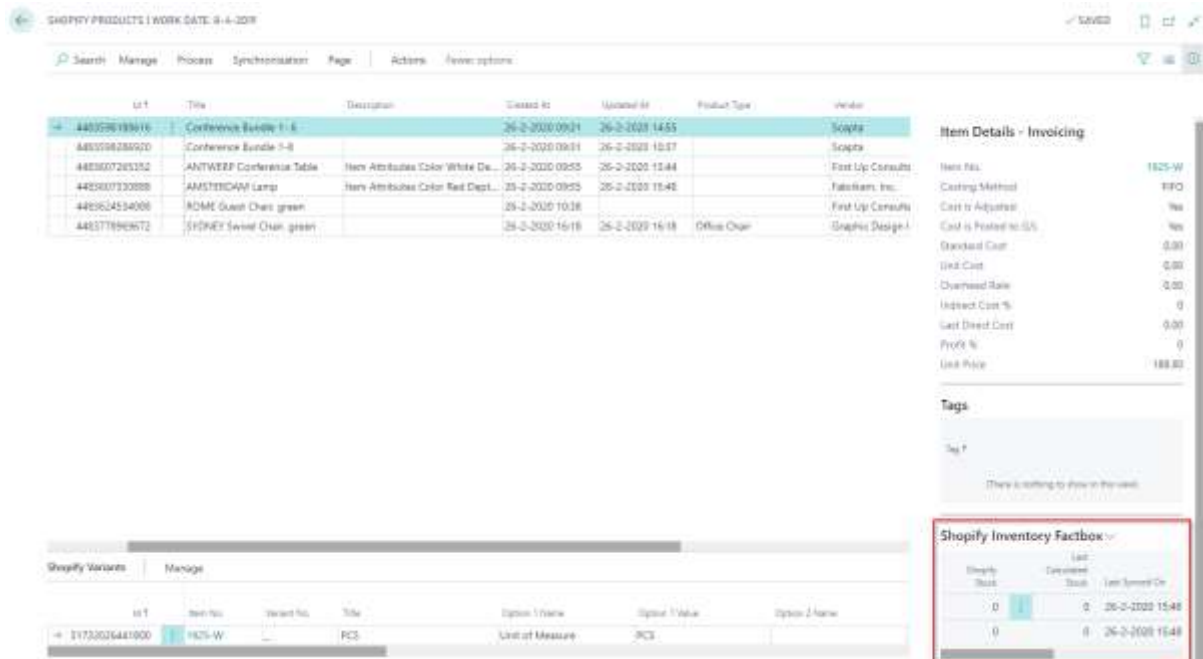
The inventory of Shopify goes to Business Central. If there is a difference with the calculated inventory in Business Central, the inventory is updated in Shopify.



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



On the Shopify Products page in Business Central, you can find the 'Shopify Inventory Factbox'. In this factbox you get an overview of the Shopify Stock and the last calculated inventory in Business Central. There is a record per location.





## 5. Customer Synchronization

### 5.1 Setup customers to synchronize

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

- **Customer 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

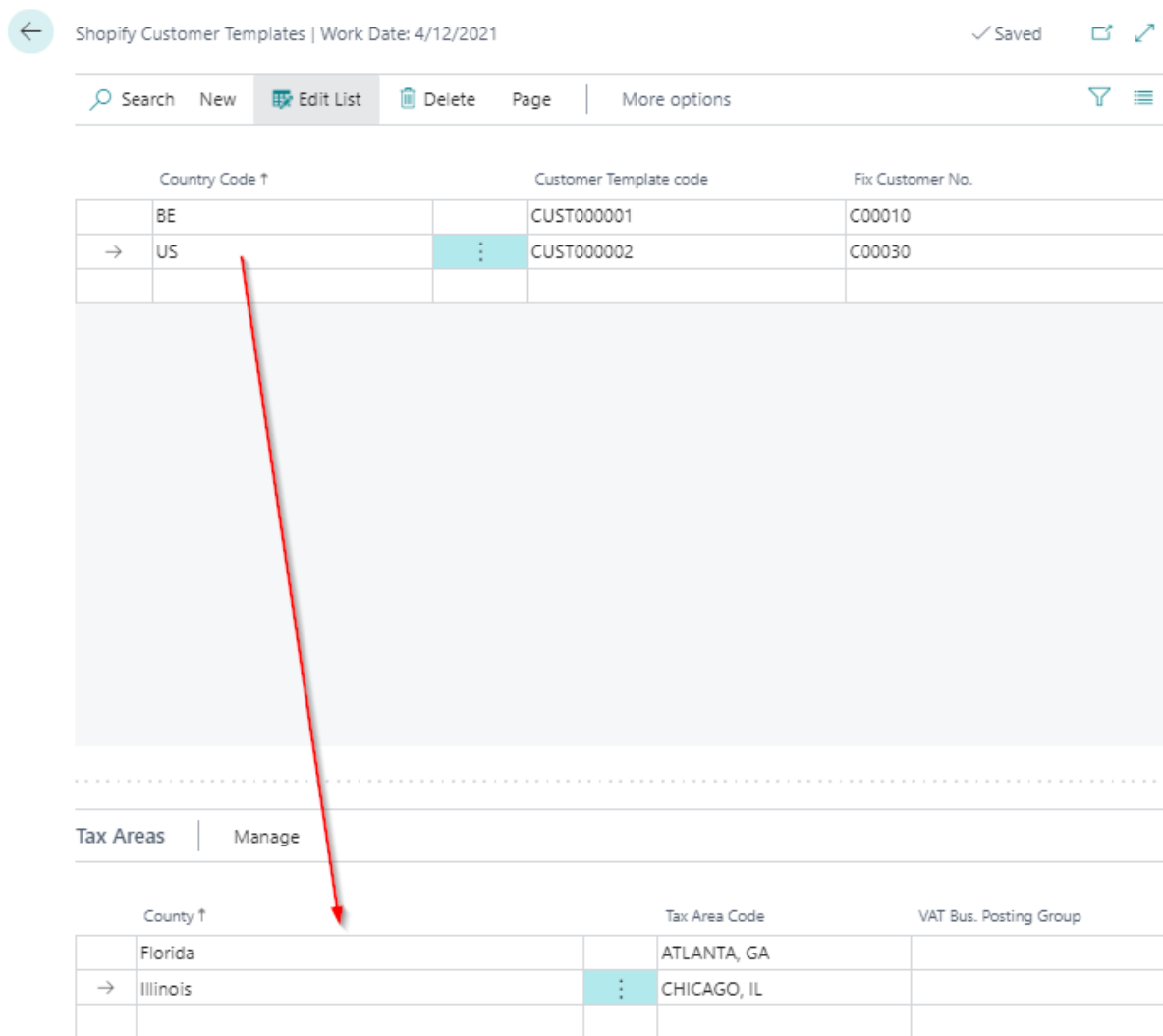
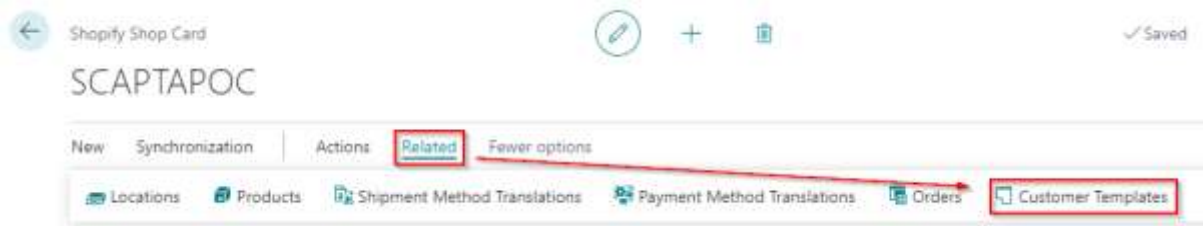
## 5.2 Customer template per country

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 and default customer for each country.





## Scaptify Shopify Connector User Guide

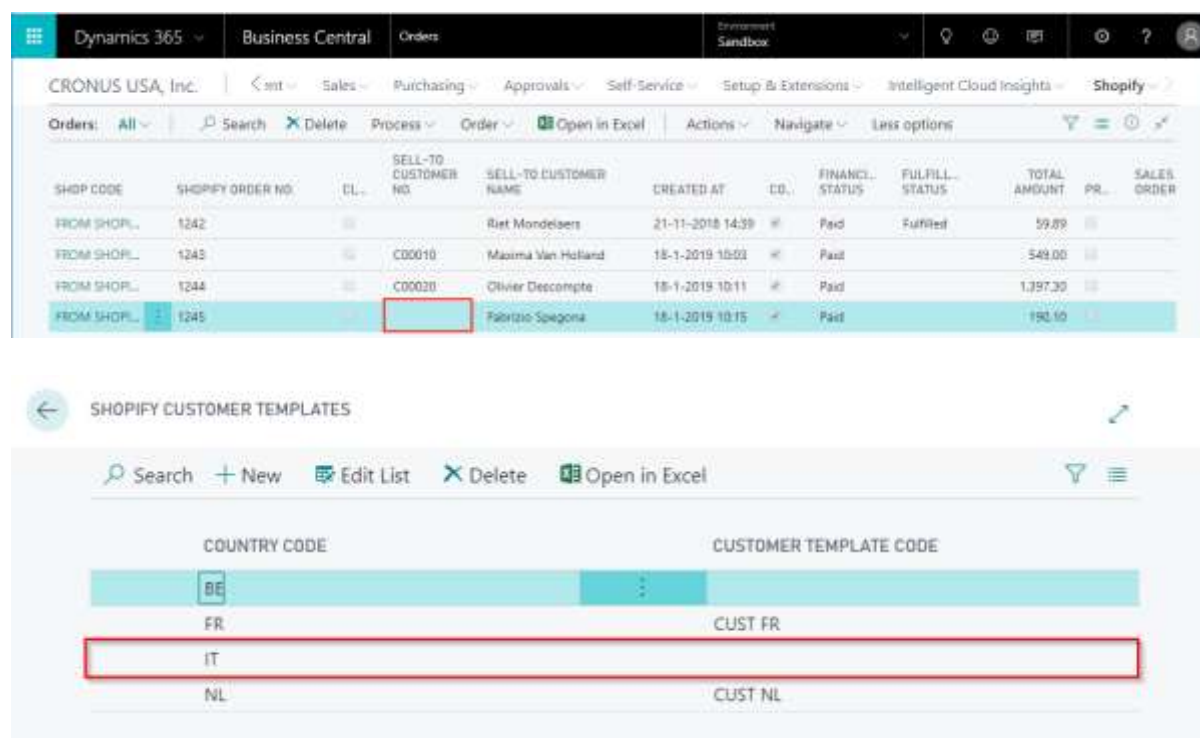
VERSION 8 | 12-9-2021

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

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

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

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



The screenshot shows two parts of the Dynamics 365 Business Central interface. The top part is a table of Shopify orders, and the bottom part is a list of Shopify customer templates.

| SHOP CODE    | SHOPIFY ORDER NO. | DL. | SELL-TO CUSTOMER NO. | SELL-TO CUSTOMER NAME | CREATED AT       | CO. | FINANCIAL STATUS | FULFILL STATUS | TOTAL AMOUNT | PR. | SALES ORDER |
|--------------|-------------------|-----|----------------------|-----------------------|------------------|-----|------------------|----------------|--------------|-----|-------------|
| FROM SHOP... | 1242              |     |                      | Riet Mondelaers       | 21-11-2018 14:39 |     | Paid             | Fulfilled      | 59.89        |     |             |
| FROM SHOP... | 1243              |     | C00010               | Maxima Van Holland    | 18-1-2019 10:50  |     | Paid             |                | 549.00       |     |             |
| FROM SHOP... | 1244              |     | C00020               | Olivier Descompte     | 18-1-2019 10:11  |     | Paid             |                | 1,397.30     |     |             |
| FROM SHOP... | 1245              |     |                      | Fabrizio Spagona      | 18-1-2019 10:15  |     | Paid             |                | 192.50       |     |             |

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



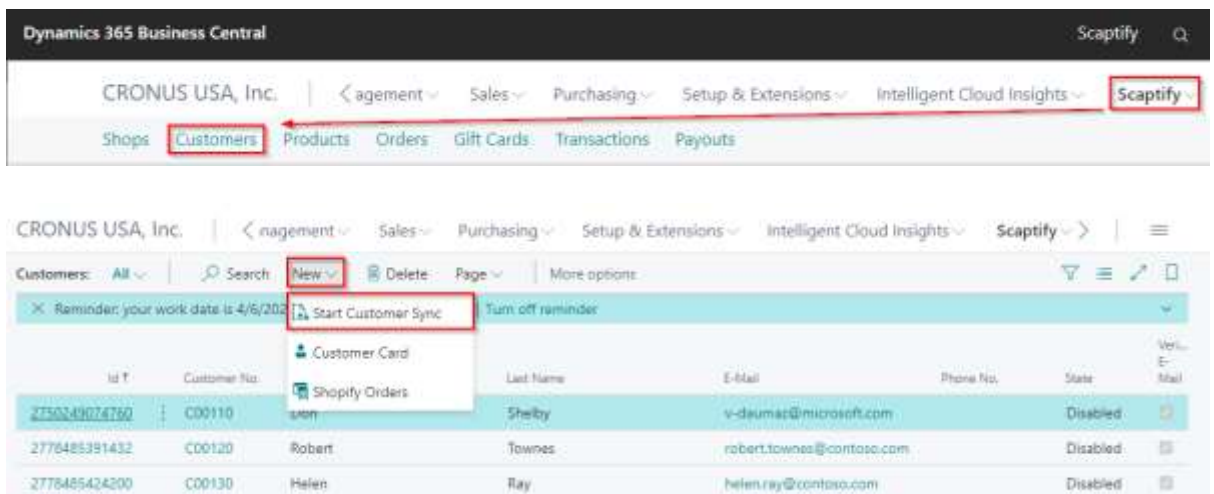
### 5.3 Synchronize customers

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

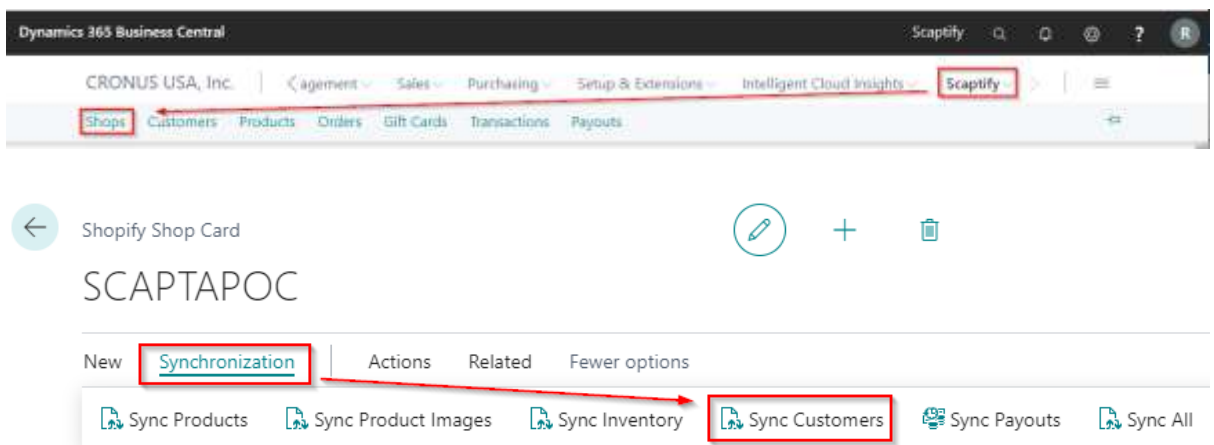
#### 5.3.1 Manually sync customers

There are two ways to go to the customer sync.

- Via 'Customers'



- Via the Shopify Shop Card





### 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 in light blue, 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 card shows the following details:

- General:** First Name: Don, Last Name: Shelby, E-Mail: v-daumaz@microsoft.com, State: Disabled, Verified E-Mail: Enabled.
- Mapping:** Customer No.: C00040, Name: Shelby inc, Address: Address st.
- Addresses:** A table with columns: Def., Company, Firstname, Lastname, Address 1, Zip, Country/Co. The first row shows: →, ✓, Shelby inc, Don, Shelby, Address st, 71119, LT.

### 5.4 Manually create customers

When the customer is not automatically created for one reason or another, it can be created manually.

In the Shopify Order, you can select a customer template code and create the customer via the function 'Create new customer' or you can select an existing customer.

| Shopify Order No. | Shop Code     | Risk Level | Clos. | Sell-to Customer No. | Self-to Customer Name | Created At            | Con. | Financial Status | Fulfillment Status | Total Amount |
|-------------------|---------------|------------|-------|----------------------|-----------------------|-----------------------|------|------------------|--------------------|--------------|
| WEB1280           | SCAPTAPOC     | Low        |       |                      |                       | 10/8/2020 9:21 AM     |      | Paid             | Unfulfilled        | 110.00       |
| WEB1281           | FROM SHOPL... | Low        |       |                      | Tray Research         | 10/14/2020 1:34 L...  |      | Paid             | Unfulfilled        | 10.00        |
| WEB1291           | FROM SHOPL... | Low        |       | CD0240               | Scapta                | 10/21/2020 11:50 L... |      | Paid             | Partially Ful...   | 118.69       |

Shopify Order  
WEB1280

Process | Order | Actions | Related | Fewer options

Find Mappings | Create Sales Document | Create New Customer

Shop Code ..... SCAPTAPOC

Shopify Order No. .. WEB1280

Risk Level ..... Low

Customer Templ... .. CUST000001

Sell-to Customer... \* ..

Shipping Method ..

Email ..... frank.auwers@scapta.com

Phone No. ....

Test .....

Created At ..... 10/8/2020 9:21 AM

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 | <input type="text" value="Riet"/>                     | Accepts Marketing | <input type="checkbox"/>              |
| Last Name  | <input type="text" value="Mondelaers"/>               | State             | <input type="text" value="Disabled"/> |
| E-Mail     | <input type="text" value="rietmondelaers@gmail.com"/> | Verified E-Mail   | <input checked="" type="checkbox"/>   |
| Phone No.  | <input type="text"/>                                  | Note              | <input type="text"/>                  |

### Mapping

|              |                      |         |                      |
|--------------|----------------------|---------|----------------------|
| Customer No. | <input type="text"/> | Name2   | <input type="text"/> |
| Name         | <input type="text"/> | Address | <input type="text"/> |

### Addresses

Manage ✎

| Def. | Company | Firstname | LastName   | Address1           | Zip  | CountryCo... |
|------|---------|-----------|------------|--------------------|------|--------------|
| →    | Scapta  | Riet      | Mondelaers | Kempische Steenweg | 3500 | BE           |



## 6. Order Processing

### 6.1 Setup Order Processing

On the tab 'Order Processing' of the Shopify Shop Card, you can define some setup for order processing.

**Order Processing**

|                        |       |                                |                                     |
|------------------------|-------|--------------------------------|-------------------------------------|
| Shipping Cost Account  | 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: Riet Mondelaers Due Date: 27-3-2020

Contact: Riet Mondelaers Requested Delivery Date:

Posting Date: 8-4-2019 External Document No.:

Order Date: 8-4-2019

**Scaptify**

Shopify Order No.: WEB1273

| Type        | No.    | Description                | Location Code | Quantity | Qty to Assemble to Order | Reserved Quantity | Unit of Measure Code | Unit |
|-------------|--------|----------------------------|---------------|----------|--------------------------|-------------------|----------------------|------|
| → Comment   | :      | Shopify Order No.: WEB1273 |               |          |                          |                   |                      |      |
| Item        | 1928-5 | 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

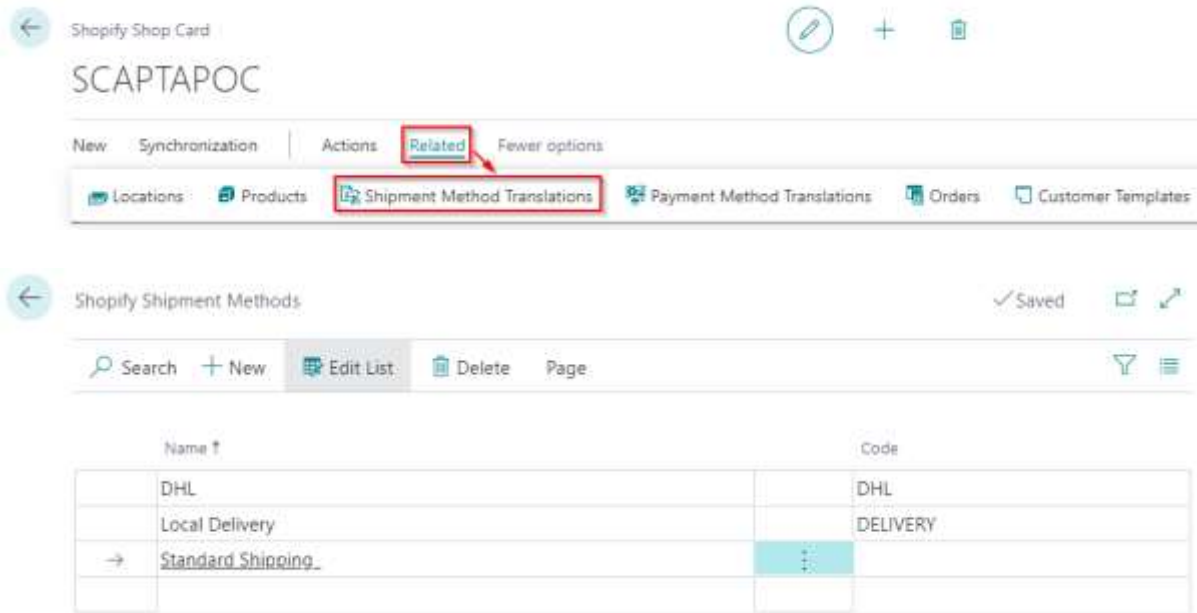
### 6.1.1 Shipment method translations

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.

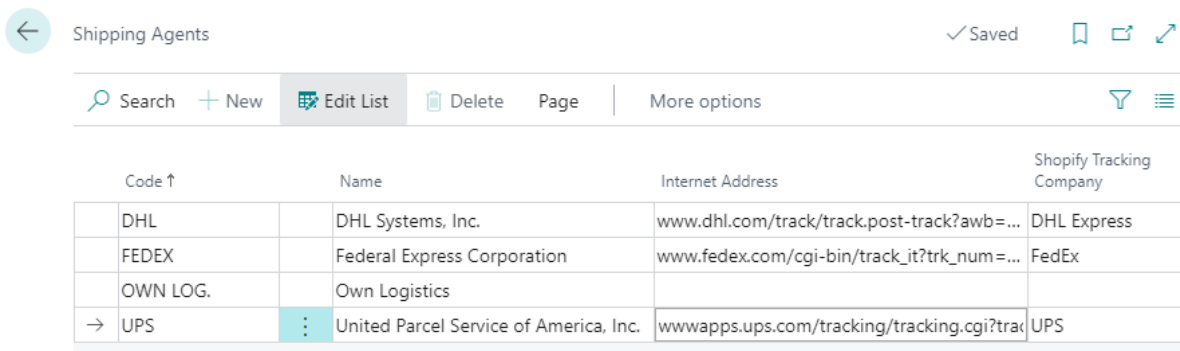


The screenshot shows two parts of the Dynamics 365 Business Central interface. The top part is the 'Shopify Shop Card' for 'SCAPTAPOC', with a navigation bar containing 'New', 'Synchronization', 'Actions', 'Related', and 'Fewer options'. A red box highlights the 'Related' tab, and another red box highlights the 'Shipment Method Translations' link in the sub-navigation bar. The bottom part is the 'Shopify Shipment Methods' list view, showing a table with columns 'Name' and 'Code'.

| 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.



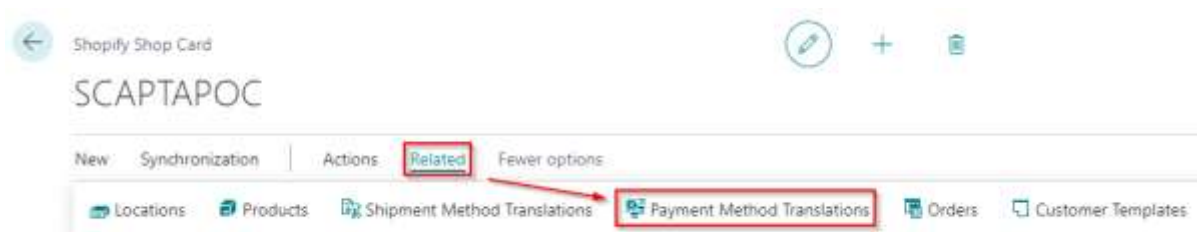
The screenshot shows the 'Shipping Agents' list view in Dynamics 365 Business Central. The table has columns for 'Code', 'Name', 'Internet Address', and 'Shopify Tracking Company'. The 'UPS' row is selected, indicated by a blue arrow and a vertical bar.

| 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.

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

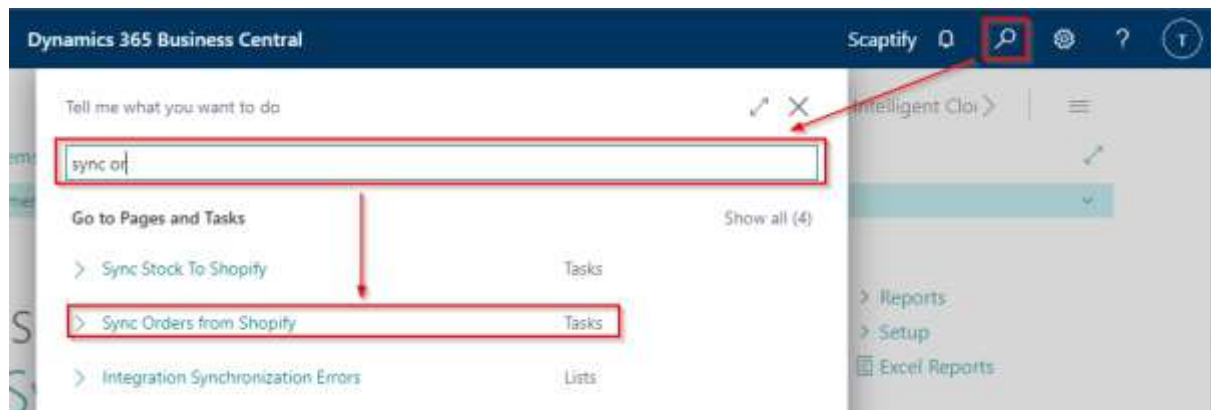


## 6.2 Execute Order Synchronization

### 6.2.1 By batch task

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

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





Sync Orders from Shopify ↗ ✕

---

Filter: Shopify Shop

✕ Code ..... SCAPTAPOC ▼

[+ Filter...](#)

---

Filter: Shopify Orders To Import

✕ Fully Paid ..... Yes ▼

✕ Risk Level ..... Low 🟢 ▼

✕ Financial Status ..... ▼

✕ Fulfillment Status ..... ▼

✕ Confirmed ..... ▼

✕ Action ..... ▼

✕ Attribute Key Exists ..... ▼

[+ Filter...](#)

Filter totals by:

✕ Attribute Key Filter .....

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

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

### 6.2.2 By action 'Sync orders from Shopify'

When you navigate to the Shopify Orders via your Shopify Shop, you can execute the function 'Sync Orders From Shopify' to synchronize the orders from your Shopify Account.

The screenshot shows the Dynamics 365 Business Central interface for CRONUS USA, Inc. The top navigation bar includes 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Setup & Extensions', and 'Scaptify'. The main navigation bar includes 'Shops', 'Customers', 'Products', 'Orders', 'Gift Cards', 'Transactions', and 'Payouts'. The 'Orders' section is active, and a dropdown menu is open under the 'Process' button, showing 'Sync Orders From Shopify' and 'Create Sales Documents'. Below the menu is a table of orders with columns for 'Shopify Order No.', 'Sell-to Customer No.', 'Sell-to Customer Name', 'Created At', 'Confirmed', and 'Financial Status'.

| Shopify Order No. | Sell-to Customer No. | Sell-to Customer Name | Created At          | Confirmed                           | Financial Status |
|-------------------|----------------------|-----------------------|---------------------|-------------------------------------|------------------|
| #1020             | 10000                |                       | 3/5/2021 8:30 AM    | <input checked="" type="checkbox"/> | Paid             |
| #1021             |                      |                       | 5/11/2021 8:49 AM   | <input checked="" type="checkbox"/> | Paid             |
| WEB1302           | C00070               | Riet Mondelaers       | 8/12/2021 11:47 ... | <input checked="" type="checkbox"/> | Paid             |
| #1024             | C00050               | Test Tester           | 7/6/2021 1:55 PM    | <input checked="" type="checkbox"/> | Paid             |
| #1025             | C00060               | Company               | 7/29/2021 1:40 PM   | <input checked="" type="checkbox"/> | Paid             |

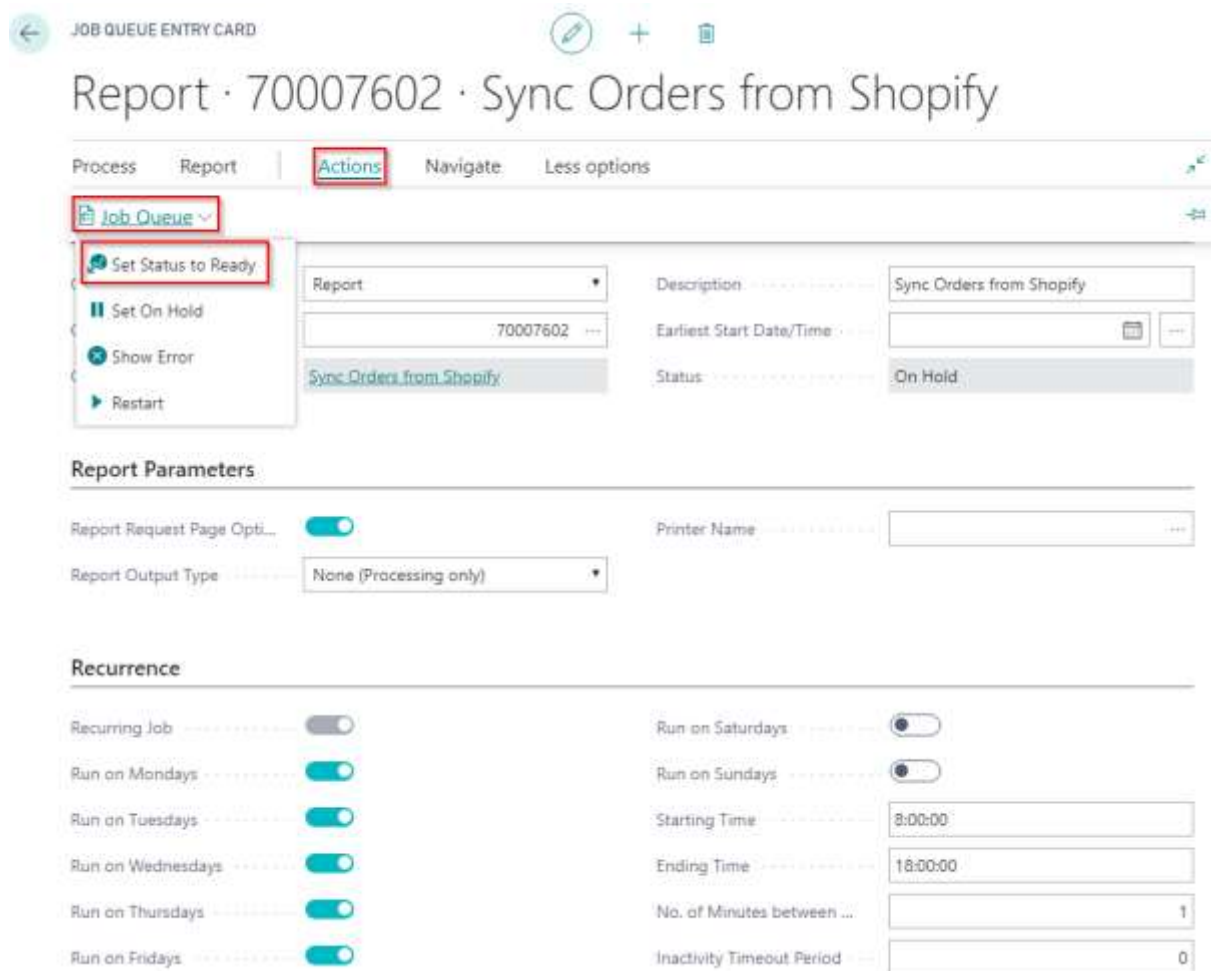
### 6.2.3 By job queue

You can also schedule a job that runs for example every few minutes.

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



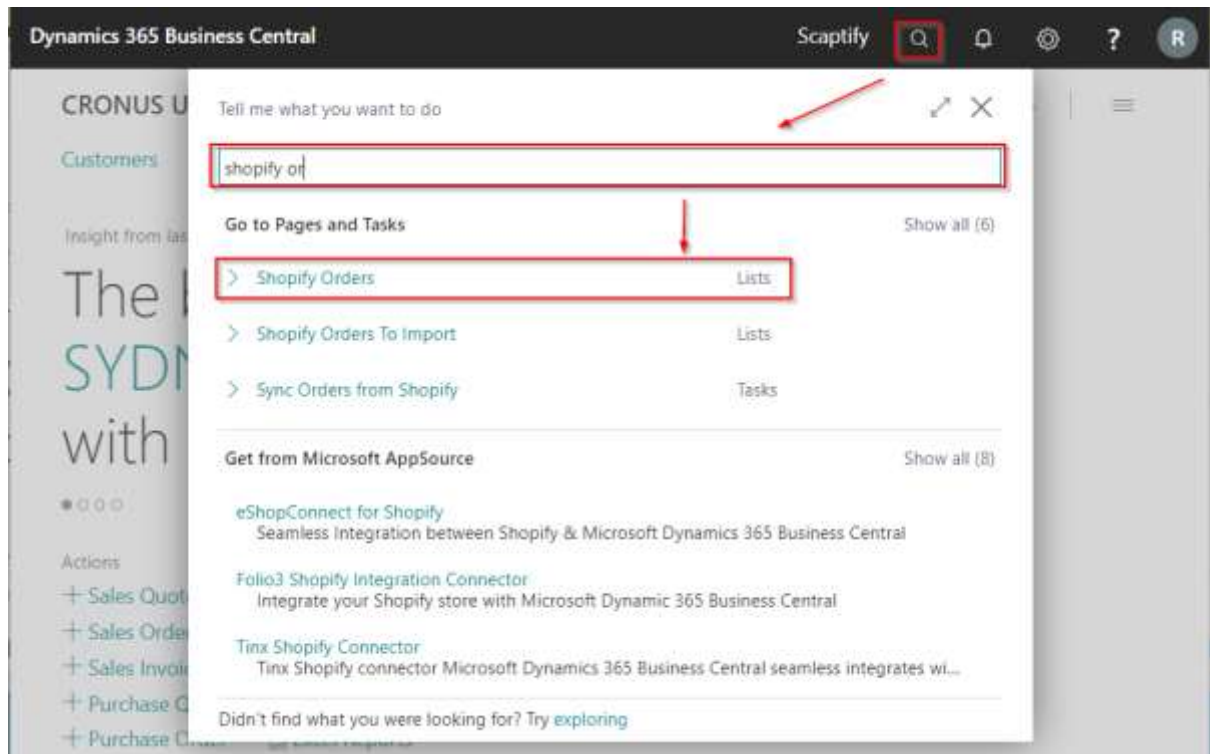
Define the recurrence of the job queue and start the job queue 'Sync Orders from Shopify'.





### 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

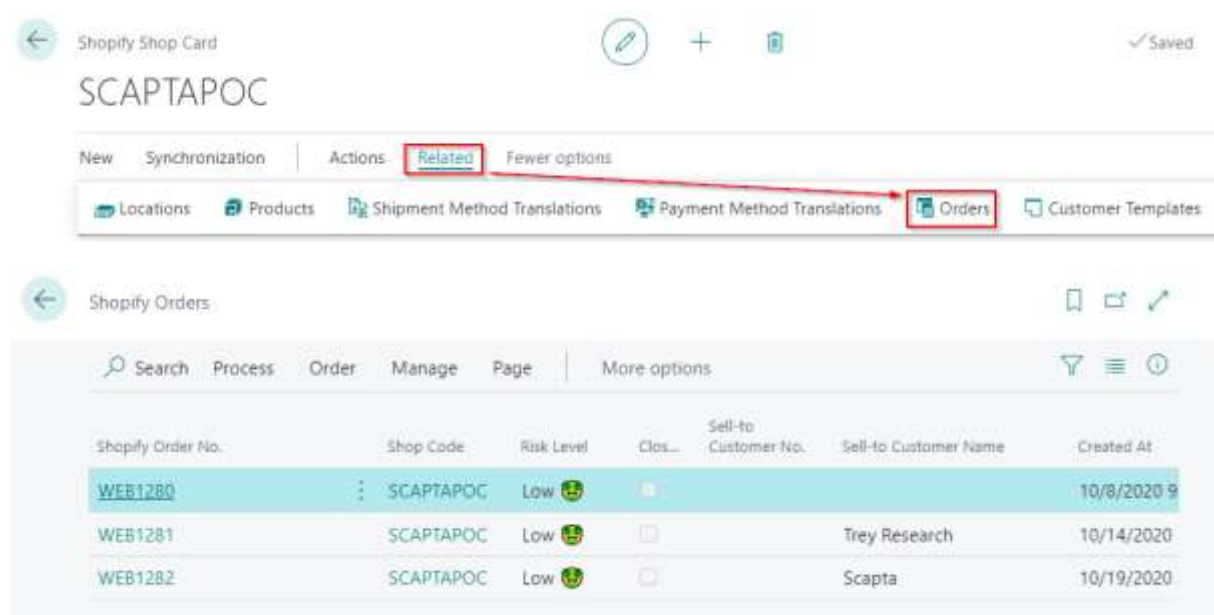
The screenshot shows the Dynamics 365 Business Central interface with the 'Scaptify' role center selected. The 'Orders' page is open, displaying a list of Shopify orders. The table has the following columns: Shopify Order No., Shop Code, Risk Level, Class, Sales Customer No., Sales Customer Name, Created At, Confirmed, Financial Status, Customer Status, Total Amount, Rec., Sales Order No., and Sales Order No. The table contains the following data:

| Shopify Order No. | Shop Code   | Risk Level | Class | Sales Customer No. | Sales Customer Name | Created At        | Confirmed | Financial Status | Customer Status | Total Amount | Rec. | Sales Order No. | Sales Order No. |
|-------------------|-------------|------------|-------|--------------------|---------------------|-------------------|-----------|------------------|-----------------|--------------|------|-----------------|-----------------|
| #1020             | TEST SCAPTA | Low        |       | 10000              |                     | 3/5/2021 8:58 AM  |           | Paid             |                 | 190.10       |      | S-ORD101006     |                 |
| #1021             | TEST SCAPTA | Low        |       |                    |                     | 5/11/2021 8:48 AM |           | Paid             |                 | 55.20        |      |                 |                 |
| WEE1102           | SCAPTAPOC   | Low        |       | C00070             | Riet Mondelaars     | 8/12/2021 11:47   |           | Paid             |                 | 490.99       |      |                 |                 |
| #1024             | TEST SCAPTA | Low        |       | C00050             | Test Tester         | 7/6/2021 1:55 PM  |           | Paid             |                 | 54.90        |      | S-ORD101018     |                 |
| #1025             | TEST SCAPTA | Low        |       | C00060             | Company             | 7/26/2021 1:40 PM |           | Paid             |                 | 54.90        |      | S-ORD101011     |                 |



### 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.



### 6.4 Process Shopify Orders

Navigate to the Shopify Orders.



Edit the Shopify order.





Shopify Order | Work Date: 4/12/2021

WEB1302 · Riet Mondelaers

Process Order Inspect Actions Related Fewer options

### General

Shop Code: SCAPTAPOC | Email: Riet.mondelaers@scapta.com

Shopify Order No.: WEB1302 | Phone No.:

Risk Level: Low 🟢 | Test:

Customer Template Code: | Created At: 8/12/2021 11:47 AM

Sell-to Customer No.: C00070 | Document Date: 8/12/2021

Shipping Method: DHL | Processed:

Payment Method: CARD | Financial Status: Paid

Closed:  | Fulfillment Status:

Sell-to Name: Riet Mondelaers | Sales Order No.:

Address: Trekvmsstraat 13 | Sales Invoice No.:

Address 2: | Error:

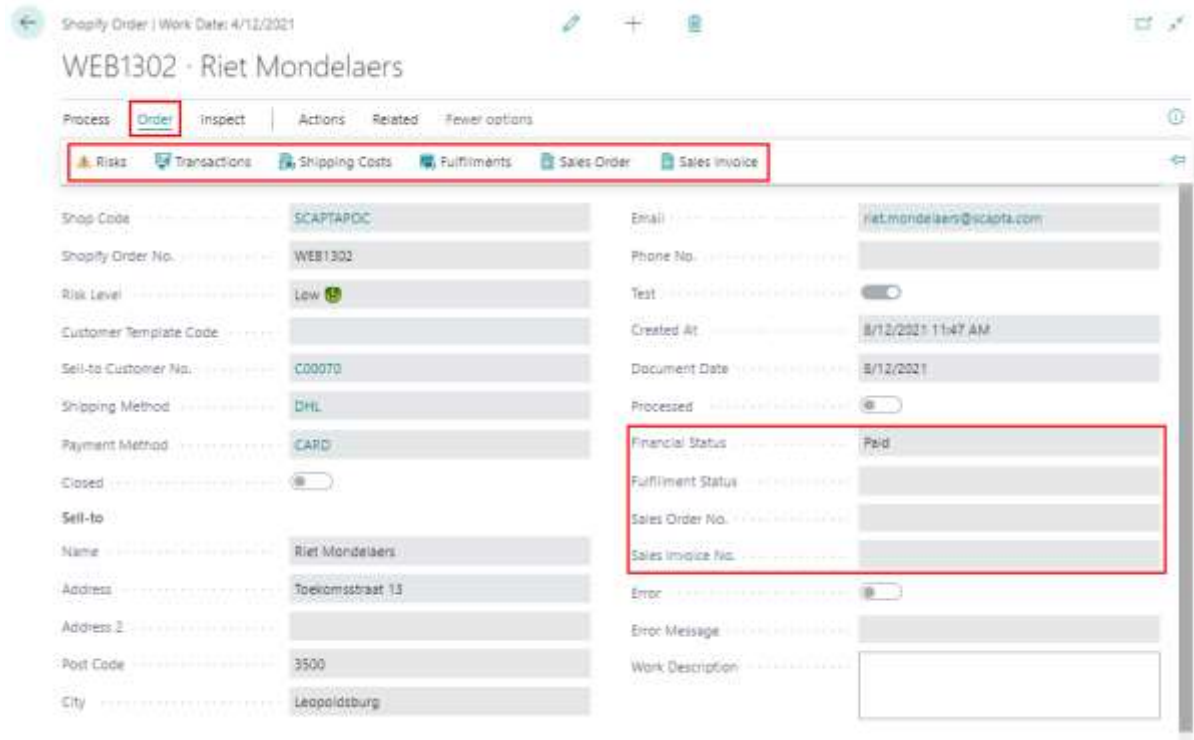
Post Code: 5500 | Error Message:

City: Leopoldsburg | Work Description:

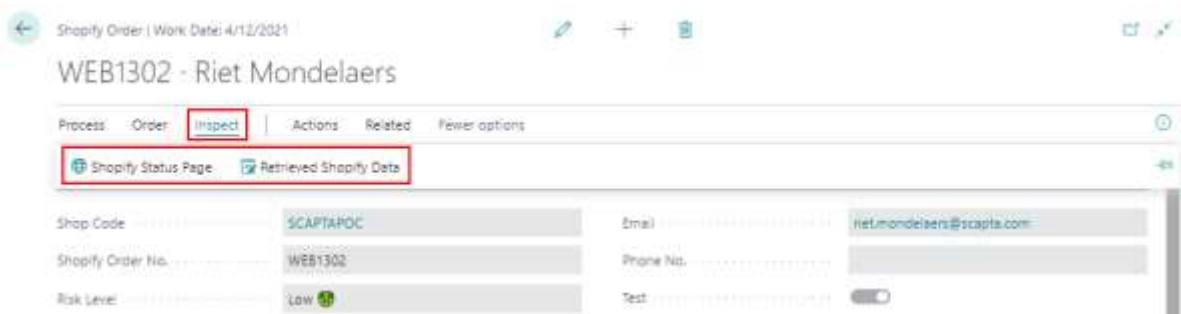
### Lines

| Item No. | Unit of Measure Code | Variant Code | Description                | Variant Description | Quantity | Unit Price | Discount Amount |
|----------|----------------------|--------------|----------------------------|---------------------|----------|------------|-----------------|
| ->       |                      |              | Tip                        |                     | 1        | 23.14      | 0.00            |
| 1936-S   | PCS                  |              | BERLIN Guest Chair, yellow |                     | 1        | 192.80     | 0.00            |
| 1007     | PCS                  | BLAUW        | HASSELT, Conference Chair  | BLAUW               | 1        | 270.00     | 0.00            |

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.



Via 'Inspect', you can go to the 'Shopify Status Page' to see the order confirmation sent to the customer. The 'Retrieved Shopify Data' shows you the data from Shopify that was retrieved.





← Data Capture List | Work Date: 4/12/2021

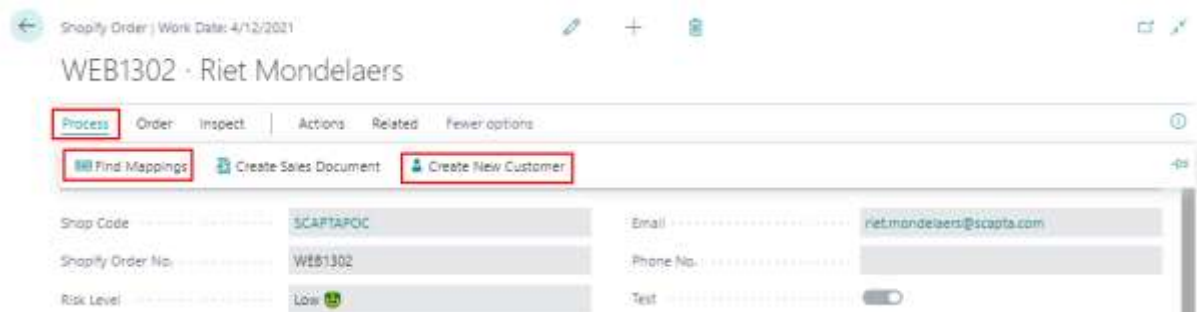
Search Download Data Page

| Entry No. | Created At         | Created By                             |
|-----------|--------------------|--|
| <u>11</u> | 8/12/2021 11:51 AM | {049aeff8-3dbd-4d14-811f-911934fc8673} |

Data

```
{
  "order": {
    "id": "3969084784712",
    "admin_graphql_api_id": "gid://shopify/Order/3969084784712",
    "app_id": "580111",
    "browser_ip": "84.193.34.78",
    "buyer_accepts_marketing": false,
    "cancel_reason": null,
    "cancelled_at": null,
    "cart_token": "b661dcab7e81c967f2c7be48181aa55f",
    "checkout_id": "21788383871048",
    "checkout_token": "549129a5d4105ece7488e78d9cec08a7",
    "client_details": {
      "accept_language": "en-US,en;q=0.9",
      "browser_height": 1041,
      "browser_ip": "84.193.34.78",
      "browser_width": 2114,
      "session_hash": null,
      "user_agent": "Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome"
    },
    "closed_at": null,
    "confirmed": true,
    "contact_email": "riet.mondelaers@scapta.com",
    "created_at": "2021-08-12T11:47:08+02:00",
    "currency": "EUR",
    "current_subtotal_price": "462.80",
    "current_subtotal_price_set": {
      "shop_money": {
        "amount": "462.80",
        "currency_code": "EUR"
      }
    }
  }
}
```

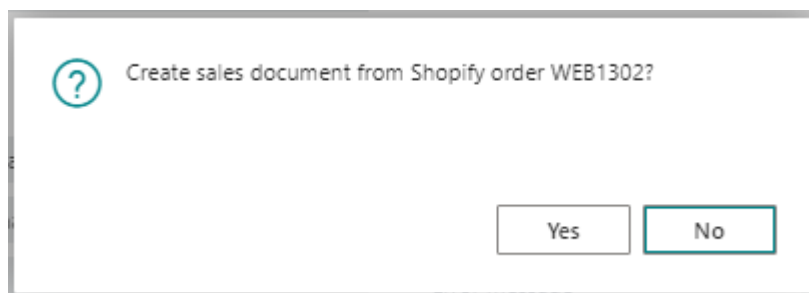
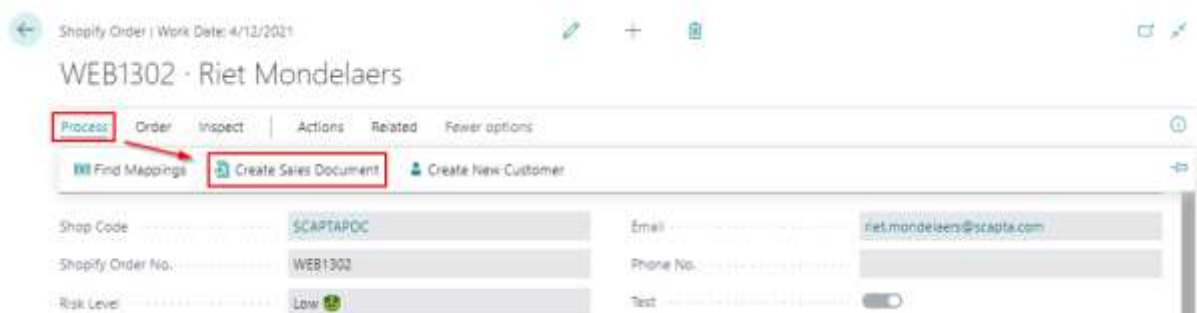
If the customer is not found automatically, you can select the correct customer, or create a new customer directly from the Shopify Order.



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

### 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".



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



Shopify Order | Work Date: 4/12/2021

WEB1302 - Riet Mondelaers

Process: **Order** | Inspect | Actions | Related | Fewer options

Risks
Transactions
Shipping Costs
Fulfillments
**Sales Order**
Sales Invoice

|                        |                          |                        |                           |
|------------------------|--------------------------|------------------------|---------------------------|
| Shop Code              | SCAPTAPOC                | Email                  | rietmondeleers@scapta.com |
| Shopify Order No.      | WEB1302                  | Phone No.              |                           |
| Risk Level             | Low                      | Test                   | <input type="checkbox"/>  |
| Customer Template Code |                          | Created At             | 8/12/2021 11:47 AM        |
| Sell-to Customer No.   | C00070                   | Document Date          | 8/12/2021                 |
| Shipping Method        | DHL                      | Processed              | <input type="checkbox"/>  |
| Payment Method         | CARD                     | Financial Status       | Paid                      |
| Closed                 | <input type="checkbox"/> | Fulfillment Status     |                           |
| Sell-to                |                          | <b>Sales Order No.</b> | <b>S-ORD101012</b>        |
| Name                   | Riet Mondelaers          | Sales Invoice No.      |                           |
| Address                | Toekomststraat 13        | Error                  | <input type="checkbox"/>  |
| Address 2              |                          | Error Message          |                           |
| Post Code              | 3500                     | Work Description       |                           |
| City                   | Leopoldsburg             |                        |                           |

| Item No. | Unit of Measure Code | Variant Code | Description                | Variant Description | Quantity | Unit Price | Discount Amount |
|----------|----------------------|--------------|----------------------------|---------------------|----------|------------|-----------------|
| -4       |                      |              | Tip                        |                     | 1        | 23.14      | 0.00            |
| 1936-S   | PCS                  |              | BERLIN Guest Chair, yellow |                     | 1        | 192.80     | 0.00            |
| 1007     | PCS                  | BLAUW        | HASSELT, Conference Chair  | BLAUW               | 1        | 270.00     | 0.00            |

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 | Work Date: 4/12/2021



✓ Saved



### S-ORD101012 · Riet Mondelaers

| Process                  | Report | Release | Posting                    | Prepare | Order | Request Approval | Print/Send | Navigate        | Actions               | Related  | Reports | Fewer options |
|--------------------------|--------|---------|----------------------------|---------|-------|------------------|------------|-----------------|-----------------------|----------|---------|---------------|
| Contact No.              |        |         | CT000035                   |         |       |                  |            | Opportunity No. |                       |          |         |               |
| Phone No.                |        |         |                            |         |       |                  |            |                 | Responsibility Center |          |         |               |
| Mobile Phone No.         |        |         |                            |         |       |                  |            |                 | Assigned User ID      |          |         |               |
| Email                    |        |         | riet.mondelaers@scapta.com |         |       |                  |            |                 | Status                | Released |         |               |
| Contact                  |        |         | Riet Mondelaers            |         |       |                  |            |                 | Work Description      |          |         |               |
| No. of Archived Versions |        |         | 0                          |         |       |                  |            |                 |                       |          |         |               |
| Document Date            |        |         | 8/12/2021                  |         |       |                  |            |                 |                       |          |         |               |
| Posting Date             |        |         | 4/12/2021                  |         |       |                  |            |                 |                       |          |         |               |

#### Scaptify

Shopify Order No. **WEB1302** Risk Level **Low** 🟢

| Lines | Manage | Line | Order | Page | Fewer options | Type        | No.    | Description                | Location Code | Quantity | Qty. to Assemble to Order | Reserved Quantity | Unit of Measure Code | Uni |
|-------|--------|------|-------|------|---------------|-------------|--------|----------------------------|---------------|----------|---------------------------|-------------------|----------------------|-----|
|       |        |      |       |      |               | → Comment   |        | Shopify Order No.: WEB1302 |               |          |                           |                   |                      |     |
|       |        |      |       |      |               | G/L Account | 40102  | Tips                       | MAIN          | 1        |                           | -                 |                      |     |
|       |        |      |       |      |               | Item        | 1936-S | BERLIN Guest Chair, yellow | MAIN          | 1        |                           | -                 | PCS                  |     |
|       |        |      |       |      |               | Item        | 1007   | BLAUW                      | MAIN          | 1        |                           | -                 | PCS                  |     |
|       |        |      |       |      |               | G/L Account | 40100  | DHL                        | 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                               |
| Sell-to                |                          | 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

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.

The screenshot displays the 'JOB QUEUE ENTRY CARD' for a report titled 'Report · 70007605 · Shopify Create Sales Orders'. The interface includes a navigation bar with 'Process', 'Report', 'Actions', 'Navigate', and 'Less options'. The 'Actions' menu is expanded, showing options: 'Job Queue', 'Set Status to Ready', 'Set On Hold', 'Show Error', and 'Restart'. The 'Set Status to Ready' option is highlighted. Below the actions, the report details are shown: 'Report' (70007605), 'Description' (Shopify Create Sales Orders), 'Earliest Start Date/Time', and 'Status' (On Hold). The 'Report Parameters' section includes 'Report Request Page Opti...' (checked) and 'Printer Name'. The 'Recurrence' section has a 'Recurring Job' toggle (checked) and checkboxes for 'Run on Mondays' through 'Run on Fridays' (all checked), and 'Run on Saturdays' and 'Run on Sundays' (unchecked). There are also input fields for 'Starting Time', 'Ending Time', 'No. of Minutes between' (0), and '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



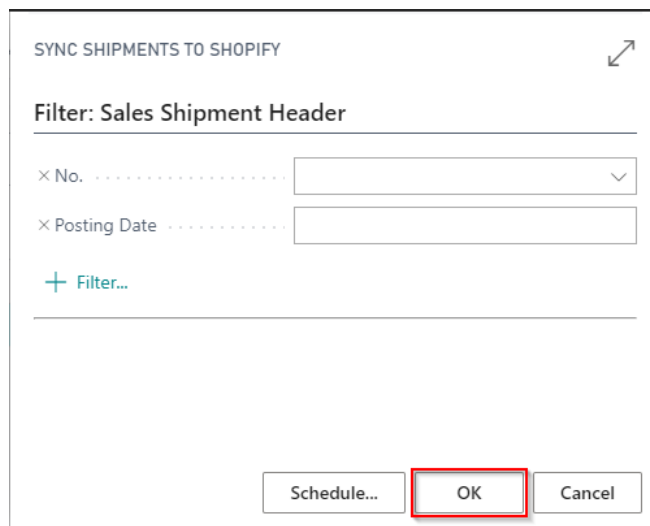
**AMSTERDAM Lamp × 1**  
BLUE / PCS

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.



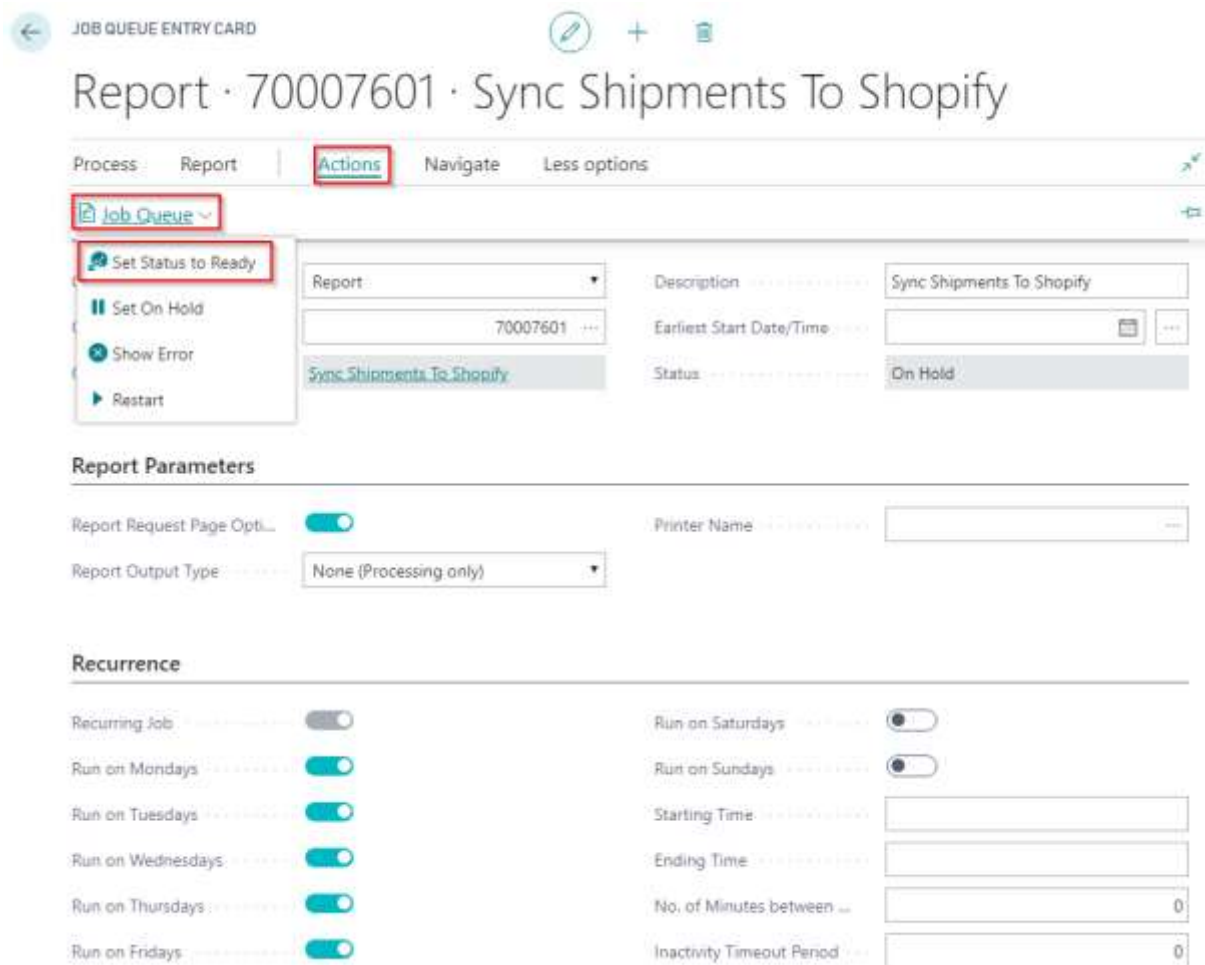
### 6.5.2 By job queue

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:



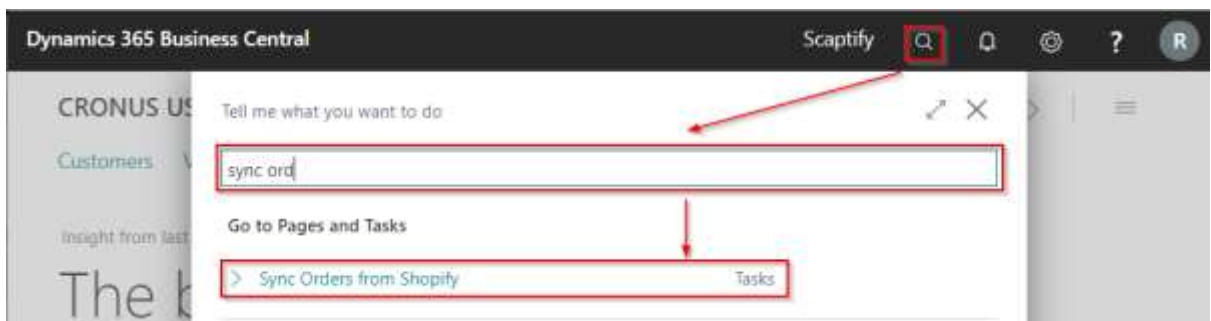
Define the recurrence of the job queue 'Sync Shipments to Shopify' and start the job queue.



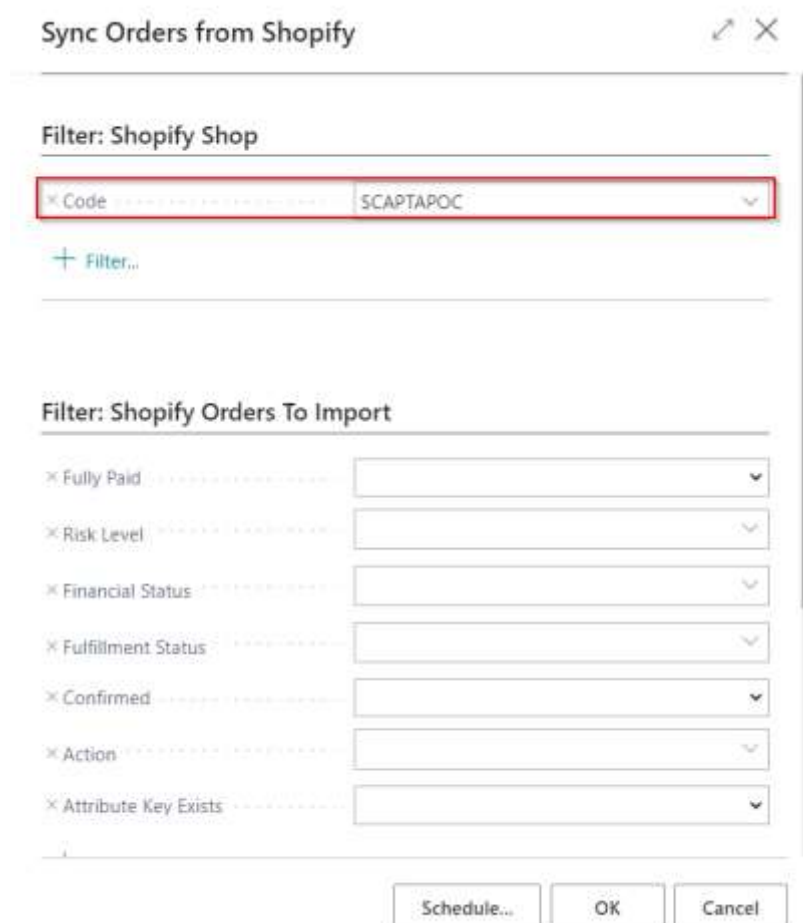


### 6.6 Synchronize orders from Shopify

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 navigation bar includes 'Scapta' and 'Scaptify'. Below it, the 'Shops' menu is highlighted, and 'Orders' is selected. The main view displays 'SHOPIFY SHOP CARD | WORK DATE: 8-4-2019' for 'SCAPTAPOC'. The 'Actions' menu is open, showing 'Navigate' and 'Orders' (highlighted). Below, a table of 'SHOPIFY ORDERS | WORK DATE: 8-4-2019' is shown with columns for Shop Code, Shopify Order No., Status, Sell-to Customer No., Sell-to Customer Name, Created At, Cont., Financial Status, Fulfillment Status, and Total Amount. The 'Fulfillment Status' column is highlighted, showing 'Fulfilled' for the first order.

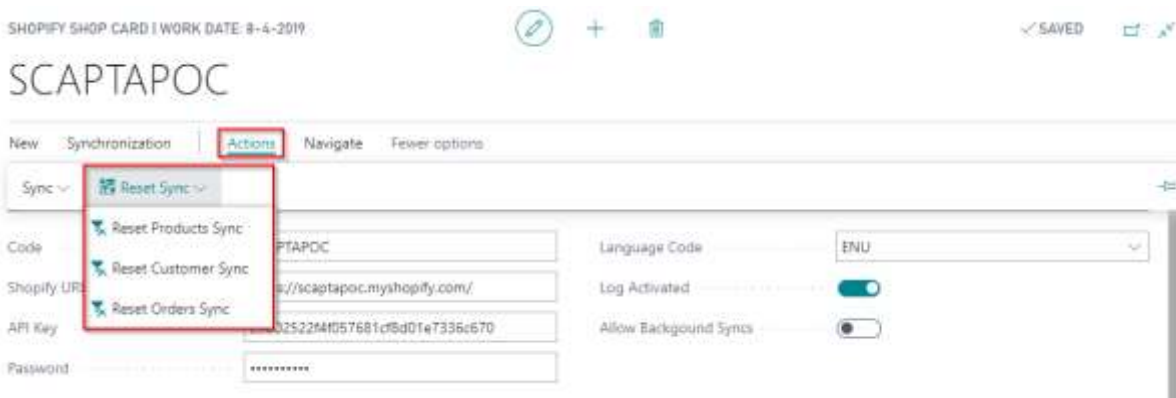
| Shop Code | Shopify Order No. | Status | Sell-to Customer No. | Sell-to Customer Name | Created At      | Cont. | Financial Status | Fulfillment Status | Total Amount |
|-----------|-------------------|--------|----------------------|-----------------------|-----------------|-------|------------------|--------------------|--------------|
| SCAPTAPOC | WEB1272           | ✓      | C00010               | Riet Mondelaers       | 26-2-2020 11:39 | ✓     | Paid             | Fulfilled          | 59.89        |
| SCAPTAPOC | WEB1273           |        | C00010               | Riet Mondelaers       | 27-2-2020 11:45 | ✓     | Paid             |                    | 59.99        |
| SCAPTAPOC | WEB1274           |        |                      | Riet Mondelaers       | 27-2-2020 12:11 | ✓     | Paid             |                    | 652.79       |



### 7. Reset sync

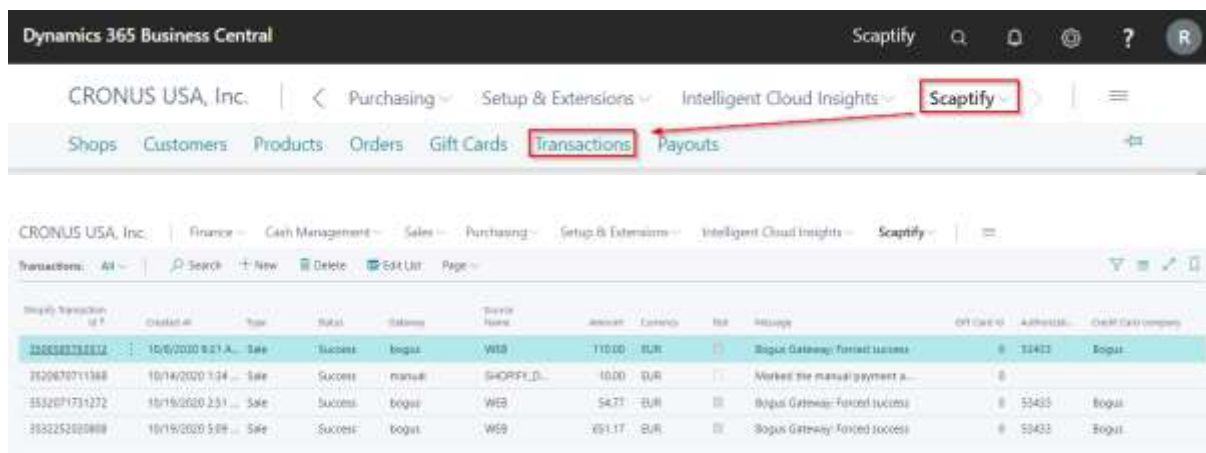
On the Shopify Shop card, there are functions available to reset the sync. This function ensures that when the sync is executed, all data is synced and not just the changes that have happened compared to the previous sync.

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



### 8. Transactions

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



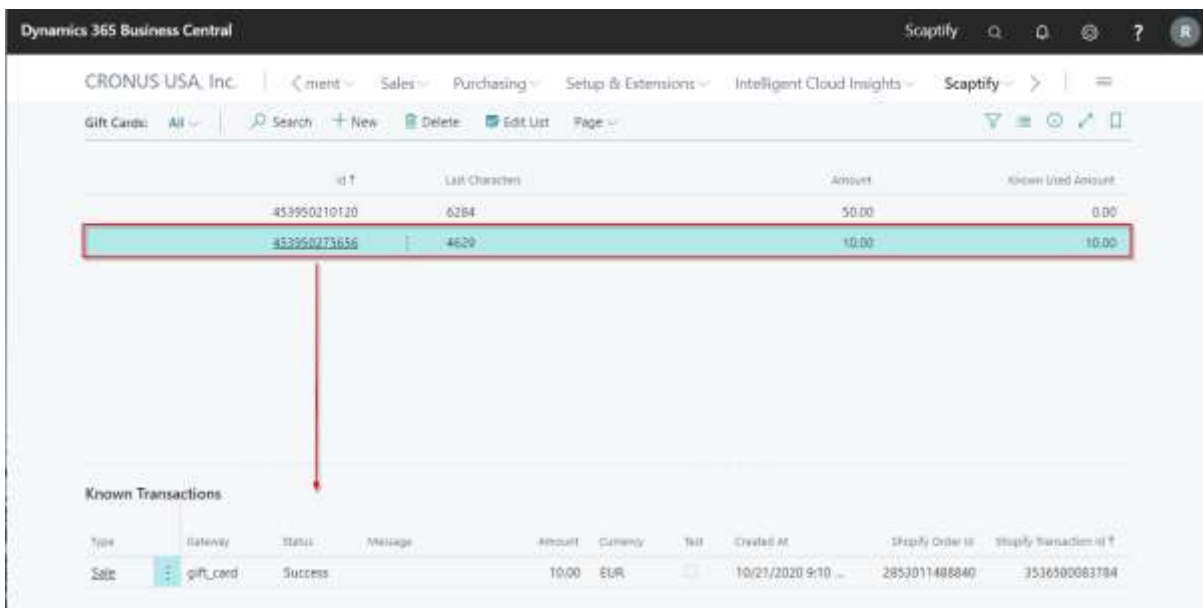


### 9. Gift Cards

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.



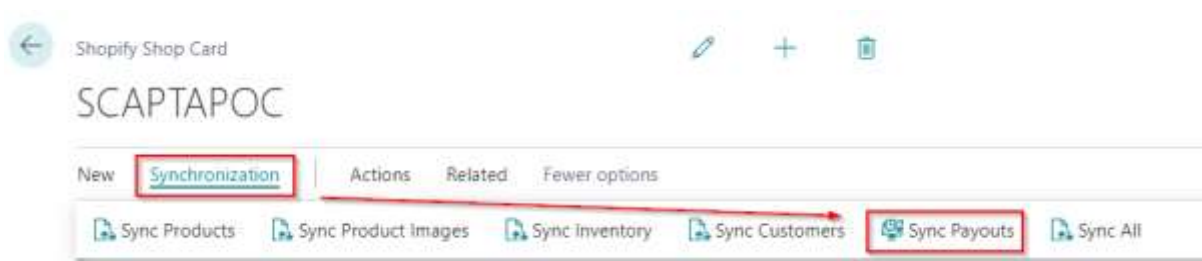


## 10. Payouts

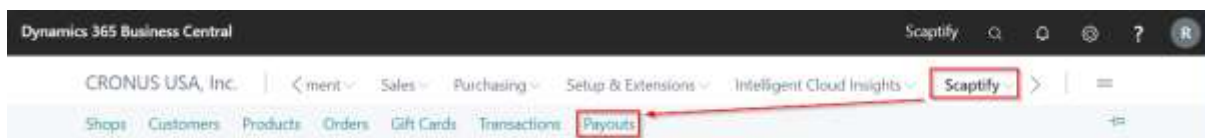
If your store has Shopify Payments enabled, then you receive payments through Shopify Payouts when a customer pays using Shopify Payments and specific accelerated checkouts.

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

Payments: All | Search | Page

| Date       | Amount   | Currency | Status     | Adjustments Fee Amount | Adjustments Gross Amount | Charge Fee Amount | Charge Gross Amount | Refunds Fee Amount | Refunds Gross Amount | Reserved Funds Fee Amount | Reserved Funds Gross Amount |
|------------|----------|----------|------------|------------------------|--------------------------|-------------------|---------------------|--------------------|----------------------|---------------------------|-----------------------------|
| 10/22/2020 | 2,319.17 | EUR      | In Transit | 0.00                   | 0.20                     | 46.81             | 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                        |

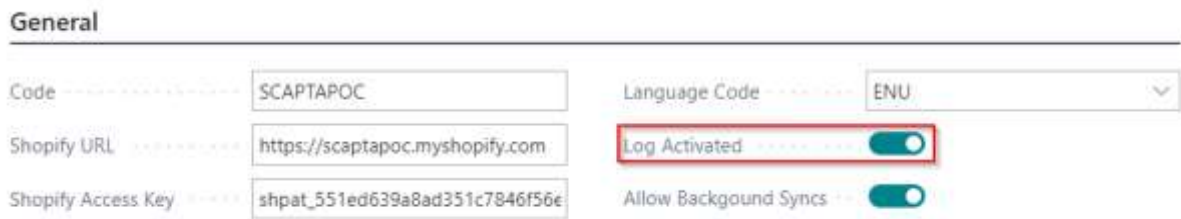
Payment Transactions

| Processed At      | Type   | Text | Amount  | Fee  | Net Amount | Category | Source Id    | Source Type | Source Order Id | Invoice No. | Source Order Transaction Id |
|-------------------|--------|------|---------|------|------------|----------|--------------|-------------|-----------------|-------------|-----------------------------|
| 10/7/2020 4:17 PM | Charge |      | 179.90  | 2.90 | 168.00     | EUR      | 874367073958 | Charge      | 2835062160000   | -           | 3442544196262               |
| 10/7/2020 9:43 PM | Charge |      | 29.95   | 0.79 | 29.16      | EUR      | 874843832480 | Charge      | 2816350011766   | -           | 3444483484198               |
| 10/6/2020 3:18 A  | Payout |      | -197.16 | 0.00 | -197.16    | EUR      | 58964770982  | Payout      |                 |             |                             |

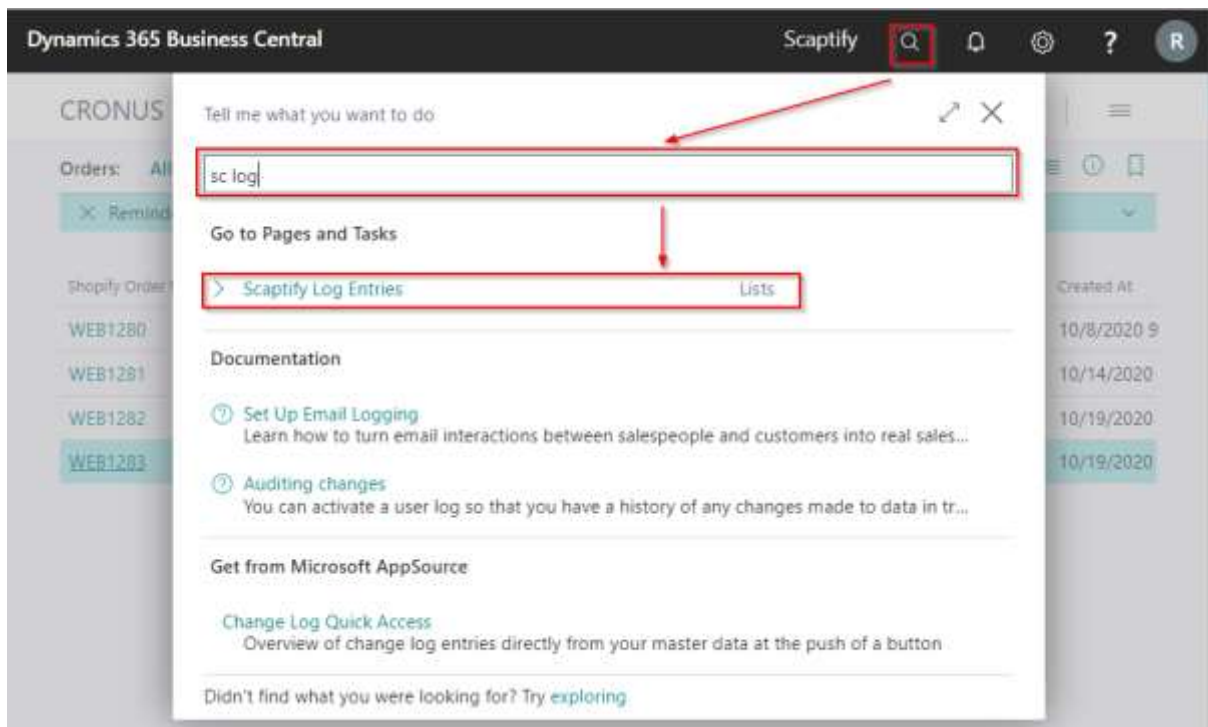


## 11. Troubleshooting

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



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 |
|-----------|---------------------|------------|---------------|-----------------------------------|--------|-------------|--------------------|
| 152       | 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/2818844369992\")}"
}
```

**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 |