



## Inhoudsopgave

- 1. PURPOSE OF THIS DOCUMENT ..... 3
- 2. SHOPIFY CONNECTOR SETUP ..... 3
  - 2.1 SHOPIFY ..... 3
    - 2.1.1 CREATE SHOPIFY ACCOUNT ..... 3
    - 2.1.2 CONFIGURE SHOPIFY ACCOUNT ..... 3
      - 2.1.2.1 CREATE API CREDENTIALS ..... 3
  - 2.2 SHOPIFY POS ..... 6
    - 2.2.1 CREATE SHOPIFY POS ACCOUNT ..... 6
  - 2.3 MICROSOFT DYNAMICS 365 BUSINESS CENTRAL ..... 7
    - 2.3.1 SHOPIFY CONNECTOR SETUP ..... 7
    - 2.3.2 SETUP SHOPS ..... 10
- 3. ITEM SYNCHRONIZATION ..... 14
  - 3.1 SYNCHRONIZE ITEM TO SHOPIFY ..... 14
    - 3.1.1 SETUP ITEMS TO SYNCHRONIZE ..... 14
    - 3.1.2 SYNCHRONIZE COLLECTIONS ..... 17
    - 3.1.3 EXECUTE ITEM SYNCHRONIZATION ..... 18
      - 3.1.3.1 BY BATCH TASK ..... 18
      - 3.1.3.2 BY ACTION 'SYNC' ..... 19
  - 3.2 SYNCHRONIZE ITEM FROM SHOPIFY TO DYNAMICS 365 BUSINESS CENTRAL ..... 22
    - 3.2.1 SETUP ITEMS TO SYNCHRONIZE ..... 22
    - 3.2.2 SETUP TO AUTOMATICALLY CREATE UNKNOWN ITEMS ..... 22
    - 3.2.3 SYNCHRONIZE COLLECTIONS ..... 22
    - 3.2.4 EXECUTE ITEM SYNCHRONIZATION ..... 24
- 4. STOCK SYNCHRONIZATION ..... 26



- 4.1 SYNCHRONIZE STOCK TO SHOPIFY ..... 26
  - 4.1.1 SETUP STOCK TO SYNCHRONIZE.....26
  - 4.1.2 EXECUTE STOCK SYNCHRONIZATION .....26
- 4.2 SYNCHRONIZE STOCK FROM SHOPIFY TO DYNAMICS 365 BUSINESS CENTRAL..... 28
  - 4.2.1 SETUP STOCK TO SYNCHRONIZE .....28
  - 4.2.2 EXECUTE STOCK SYNCHRONIZATION .....28
- 5. ORDER PROCESSING..... 29
  - 5.1 SETUP AUTOMATICALLY CREATE UNKNOWN CUSTOMERS ..... 29
    - 5.1.1 GENERAL CUSTOMER TEMPLATE .....29
    - 5.1.2 CUSTOMER TEMPLATE PER COUNTRY .....29
    - 5.1.3 VERIFY CUSTOMER CREATION.....31
    - 5.1.4 MANUALLY CREATE CUSTOMERS .....31
  - 5.2 EXECUTE ORDER SYNCHRONIZATION ..... 32
    - 5.2.1 BY BATCH TASK.....32
    - 5.2.2 BY ACTION 'SYNC ORDERS FROM SHOPIFY' ..... 34
    - 5.2.3 BY JOB QUEUE ..... 34
  - 5.3 VIEW SHOPIFY ORDERS ..... 36
    - 5.3.1 ALL SHOPIFY ORDERS .....36
    - 5.3.2 SHOPIFY ORDERS OF A SPECIFIC SHOP .....37
  - 5.4 PROCESS SHOPIFY ORDERS..... 37
    - 5.4.1 BY ACTION 'CREATE SALES DOCUMENT' .....39
    - 5.4.2 BY JOB QUEUE ..... 40
    - 5.4.3 SHOPIFY ORDER NO. ON SALES DOCUMENT LINE..... 41
  - 5.5 SYNCHRONIZE SHIPMENTS TO SHOPIFY ..... 43
    - 5.5.1 BY BATCH TASK.....44
    - 5.5.2 BY JOB QUEUE ..... 45
  - 5.6 SYNCHRONIZE ORDERS FROM SHOPIFY ..... 46
- 6. TROUBLESHOOTING ..... 49



## 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 Create API credentials

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

Follow the steps below to create the credentials:

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

- In the menu on the left, click "Apps"



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



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

A screenshot of a blue button with white text that reads "Create a new private app".

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.](#)

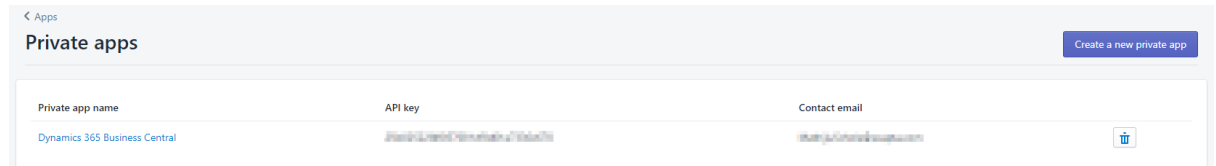
Allow this app to access your storefront data using the Storefront API

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.

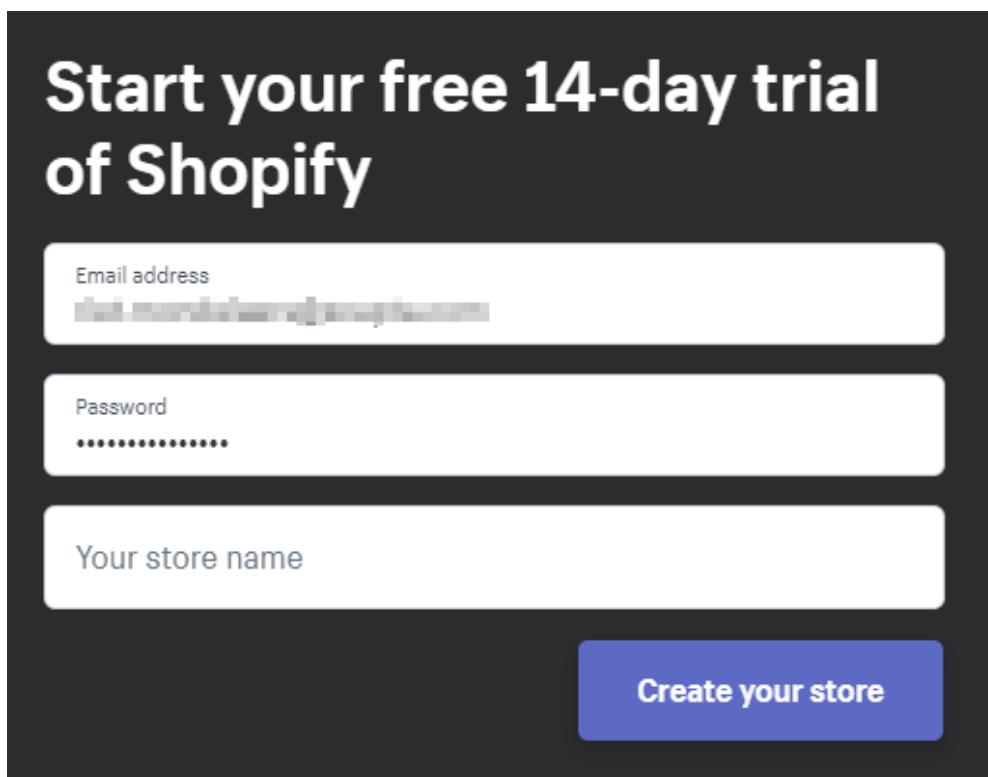


## 2.2 Shopify POS

### 2.2.1 Create Shopify POS Account

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

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



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

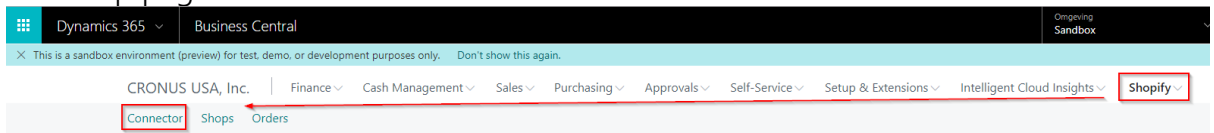


## 2.3 Microsoft Dynamics 365 Business Central

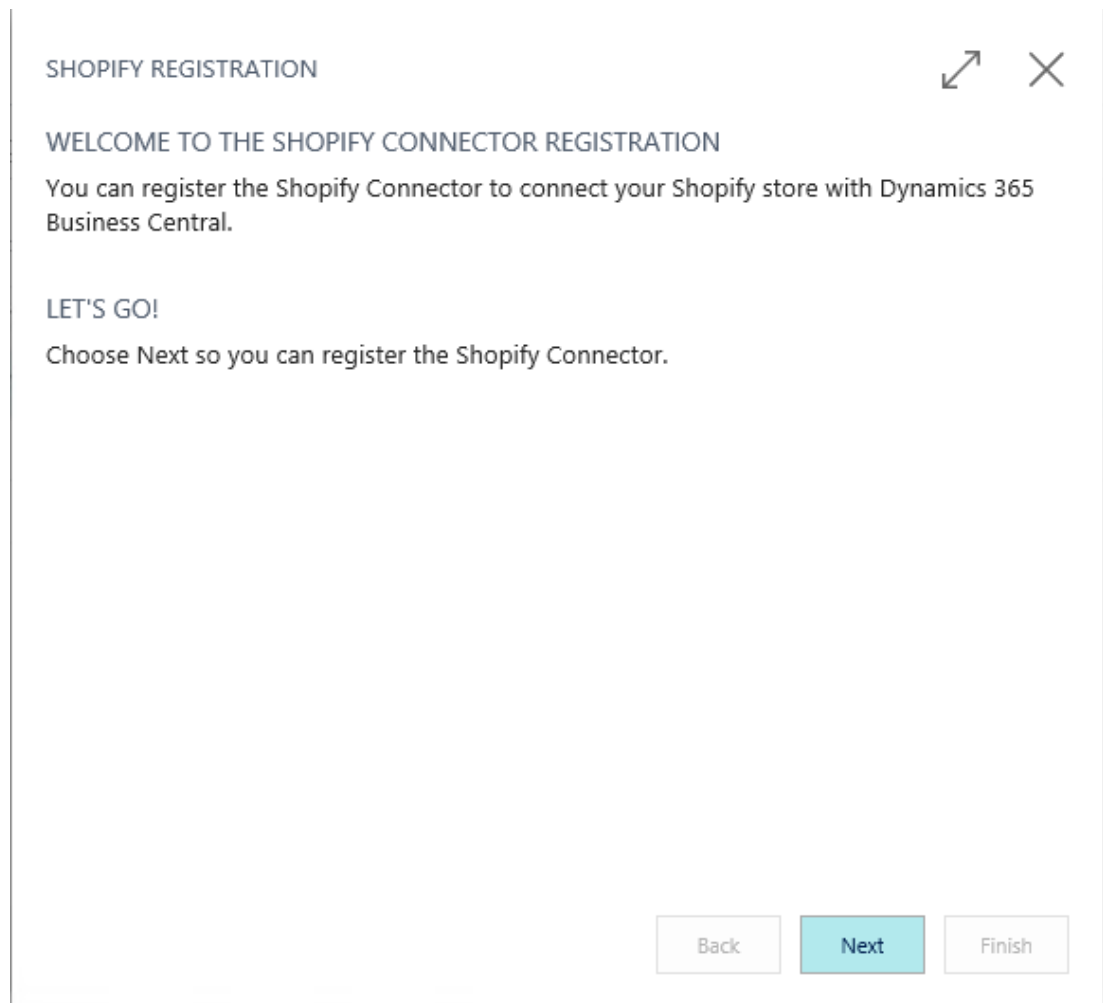
### 2.3.1 Shopify Connector Setup

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

PLEASE COMPLETE THE PAGE BELOW TO REGISTER SHOPIFY CONNECTOR.

Name

Address

Address 2

Post Code

City

County

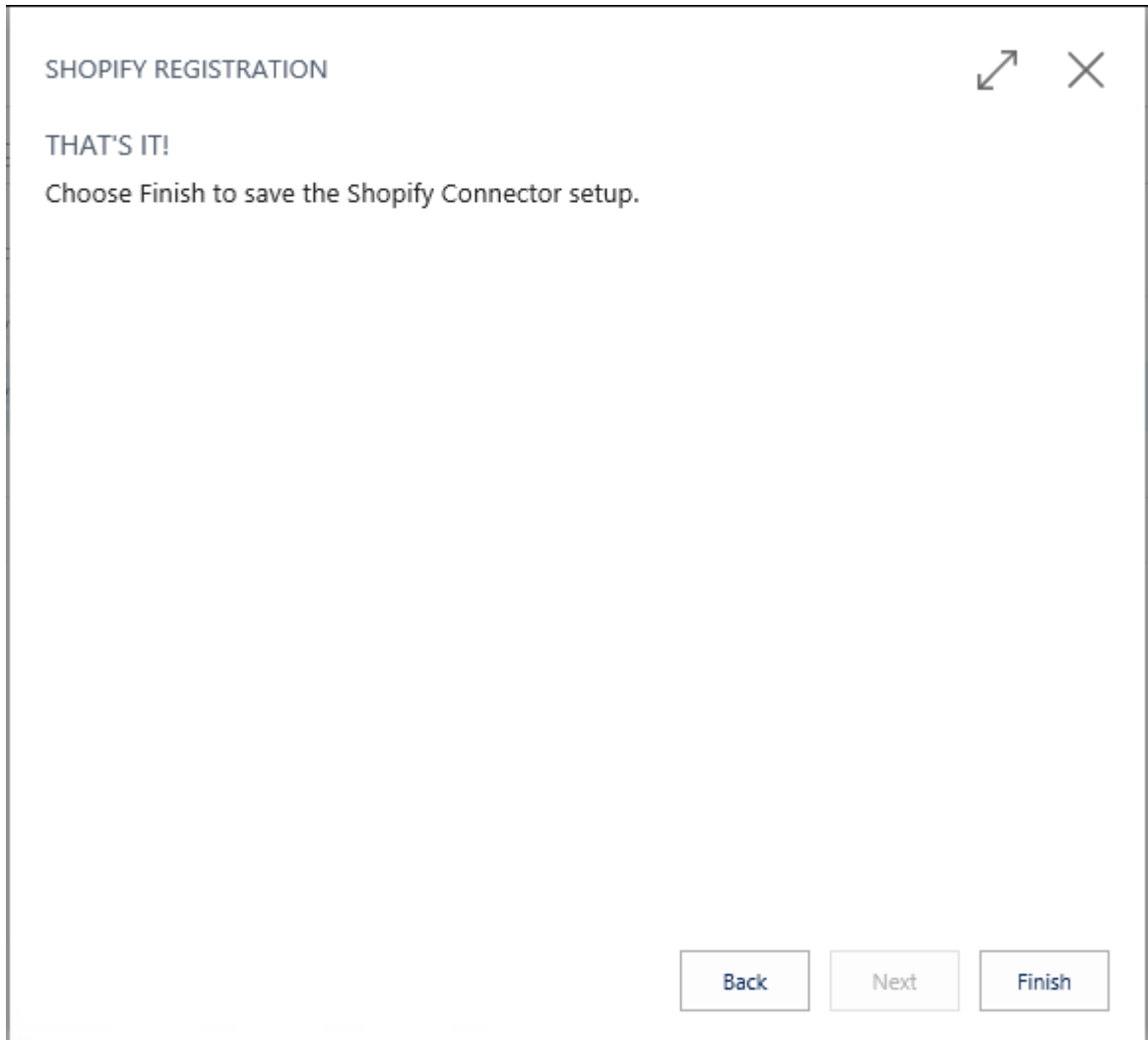
Country/Region Code

VAT Registration No.

Phone No.

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





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



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**

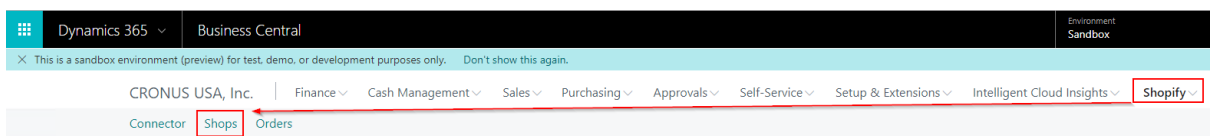
Shopify License Restrictions | Manage

NAME	PERIODE	VALUE	TYPE
Orders	Month	30	OnHold
Webshops		1	OnHold

### 2.3.2 Setup Shops

From the 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'.



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



The next step is to define how you want to synchronize your data. Depending on your choices, some fields will be added or will disappear.

More information about how to synchronize your data can be found in the user guide further in this document.

- Select how you want to sync your items
  - From Dynamics 365 Business Central to Shopify
  - From Shopify to Dynamics 365 Business Central
- Select if you automatically want to create unknown items.
- Select the Item template you want to use to create the items
- Select the default Customer price group and customer discount group you want to use for Shopify customers.
- Select if you use tax groups or VAT product posting groups when you sync items to Shopify.

Restrictions:

- The VAT/Tax setup must be the same in Shopify and NAV.



- When you use multiple VAT/tax percentages, NAV should be leading. Furthermore, the item should already exist in NAV. A new item is created based on the defined item template and uses the VAT/tax percentage defined in this template, not the one set in the Shopify Shop.
- Select how you want to sync your item images
  - From Dynamics 365 Business Central to Shopify
  - From Shopify to Dynamics 365 Business Central
- There are options available how you want to offer your items on the Shopify webshop.
  - Different variants
  - Different units of measure
- Define how you want to synch your stock
  - From Dynamics 365 Business Central to Shopify
    - Select the locations you want to synch the stock from.
    - Select if you want to sync:
      - The location stock
      - The vendor stock (next version)
      - The location and the vendor stock (next version)
  - From Shopify to Dynamics 365 Business Central

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

- Enter the 'Shipping cost Account'.
- Select if you automatically want to create unknown customers.
- Select a customer template based on which customers from Shopify, automatically or not, are created in Dynamics 365 Business Central.
- Select if you want to show your Shopify Order No. in the lines of your Sales document in Dynamics 365 Business Central

There are some restrictions for the Tax/VAT setup.



- The VAT/Tax setup must be the same in the Shopify shop and in Business Central.
- When you use multiple VAT/tax percentages, Business Central should be leading. If Business Central is not leading and you use Collections in Shopify to handle Taxes you should use the same naming convention in Business Central for Tax setup, furthermore, the item should already exist in Business Central. When this is not the case a new item is created based on the defined item template and uses the VAT/tax percentage defined in this template, not the one set in the Shopify Shop.

The Shopify Connector is now setup and ready to use.



### 3. Item Synchronization

#### 3.1 Synchronize item to Shopify

##### 3.1.1 Setup Items to synchronize

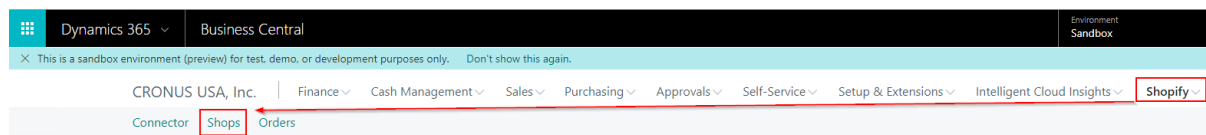
On the tab 'Synchronization' of the Shopify Shop Card, you can enter to sync the items (item data, item attributes, extended text, item tags...) and item images to Shopify.

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

#### 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.





← 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:	

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

**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

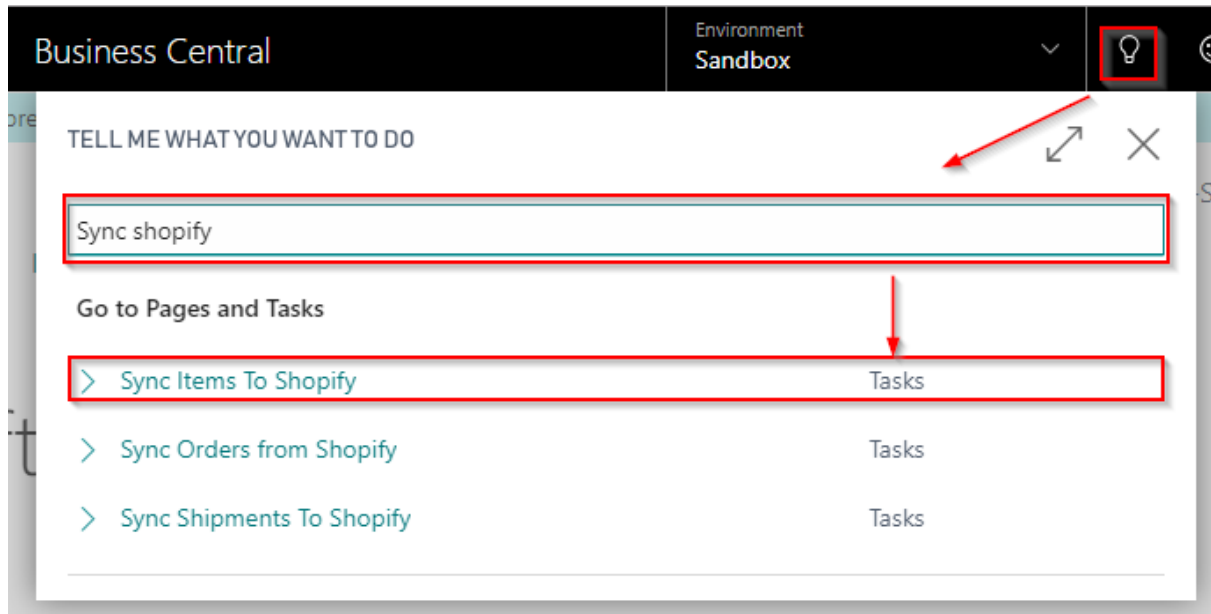
Search New Edit List Delete Open in Excel Actions Less options

SHOP CODE ▼	PRODUCT COLLECTION	PRODUCT GROUP CODE	COLLECTION NAME	ITEM TEMPLATE CODE	DEFA... FOR EXPO...
TO SHOPIFY	Tax Group	FURNITURE	FURNITURE		<input checked="" type="checkbox"/>
TO SHOPIFY	Tax Group	LABOR	LABOR		<input checked="" type="checkbox"/>
TO SHOPIFY	Tax Group	MATERIALS	MATERIALS		<input checked="" type="checkbox"/>
TO SHOPIFY	Tax Group	SUPPLIES	SUPPLIES		<input checked="" type="checkbox"/>

## 3.1.3 Execute Item Synchronization

### 3.1.3.1 By batch task

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

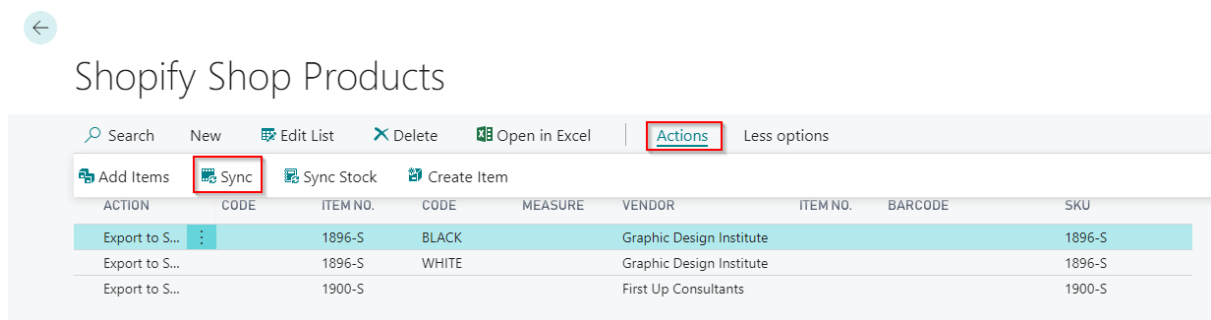


When executing this task, the configured items are synchronized to your Shopify account.

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

### 3.1.3.2 By action 'Sync'

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



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



The screenshot displays the Shopify admin interface. The left sidebar contains navigation options: 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, 'Export' and 'Import' options, and a search bar. Below the search bar is a table of products:

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



< Products ← →

### ATHENS Desk

[Duplicate](#) [View](#) [Promote](#) ▾

**Title**

**Description**

A ▾ B I U ☰ ☷ ☹ ☺ ☻ ▾ ▲ ▾

🔗 📄 🖼 🎥 🔕

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

 ▾

Vendor

 ▾

---

**Collections**

FURNITURE ✕

---

**Tags**

[View all tags](#)

Desk ✕ Athens ✕

**Variants** [Reorder variants](#) [Edit options](#) [Add variant](#)

Select: All None BLACK WHITE PCS

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

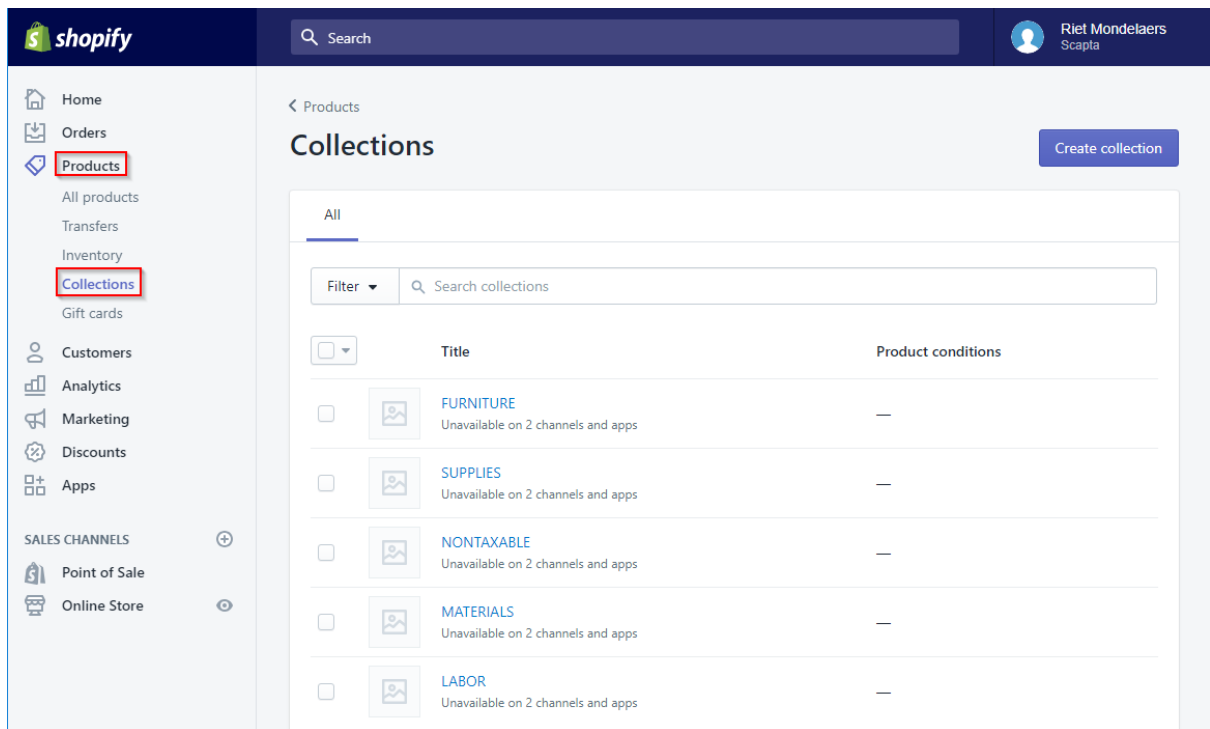
On the tab 'Synchronization' of the Shopify Shop Card, you can enter to sync the collections from Shopify.



### 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	EXPO...
-------------	------------	------	-----------------	------	---------

←

### 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...
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.

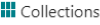
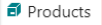






← SHOPIFY SHOP CARD 

### TO SHOPIFY

Process | **Navigate** | Less options

 Collections | ** Products** |  Orders |  Customers

Code ..... TO SHOPIFY



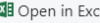
Shopify URL ..... <https://scaptapoc.myshopify.com/>





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

←

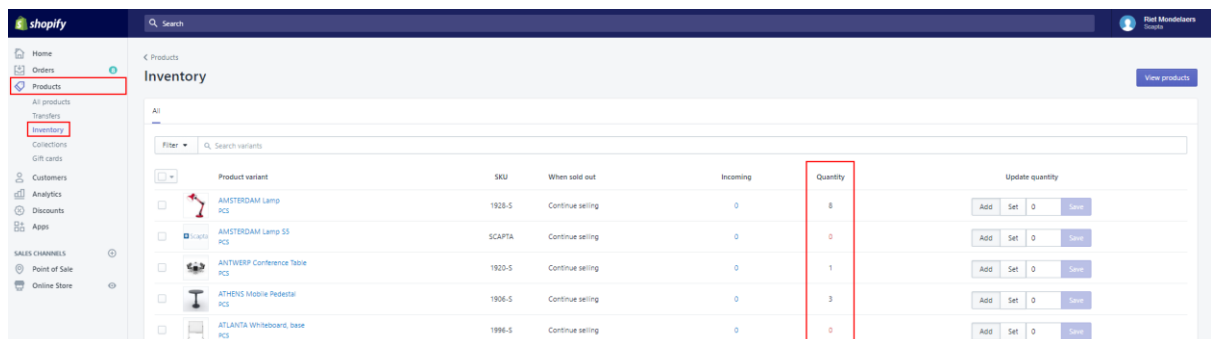
### Shopify Shop Products

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.



The screenshot shows the Shopify Admin interface. The left sidebar has 'Products' selected, with 'Inventory' highlighted. The main content area shows an 'Inventory' table with columns: Product variant, SKU, When sold out, Incoming, Quantity, and Update quantity. The 'Quantity' column is highlighted with a red box.

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 S3 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



## 4.2 Synchronize stock from Shopify to Dynamics 365 Business Central

### 4.2.1 Setup stock to synchronize

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

**Synchronization**

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

### 4.2.2 Execute stock synchronization

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

←

### 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
Map To	:	1896-S	BLACK	PCS	Graphic Design Institute			1896-S
Map To		1896-S	WHITE	PCS	Graphic Design Institute			1896-S

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



## 5. Order Processing

### 5.1 Setup automatically create unknown customers

#### 5.1.1 General customer template

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

Order Processing

Shipping Cost Account ..... 40100

Customer Template Code ..... CUST000001

Auto Create Unknown Customers

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 Filter Menu

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. <nav> 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 Spagona	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

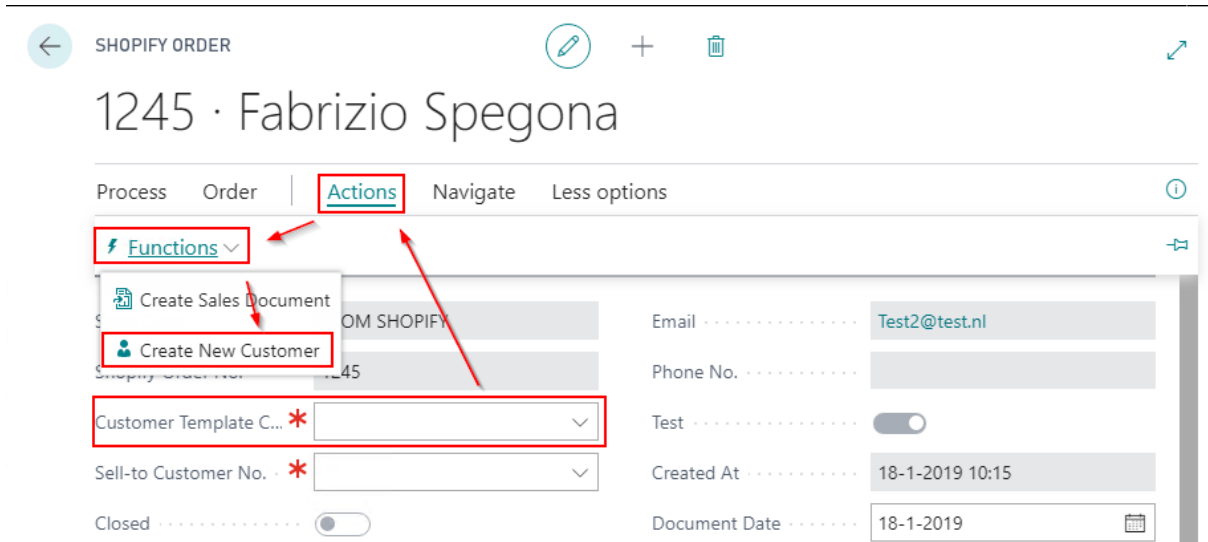
Search Edit List Delete Open in Excel

SHOP CODE	CUSTOMER ID	CUSTOMER NO.	E-MAIL	FIRST NAME	LAST NAME	PHONE NO.	TAX EXEMPT	E-MAIL VERIF.
TO SHOPIFY	679172866083	<b>C00010</b>	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"/>

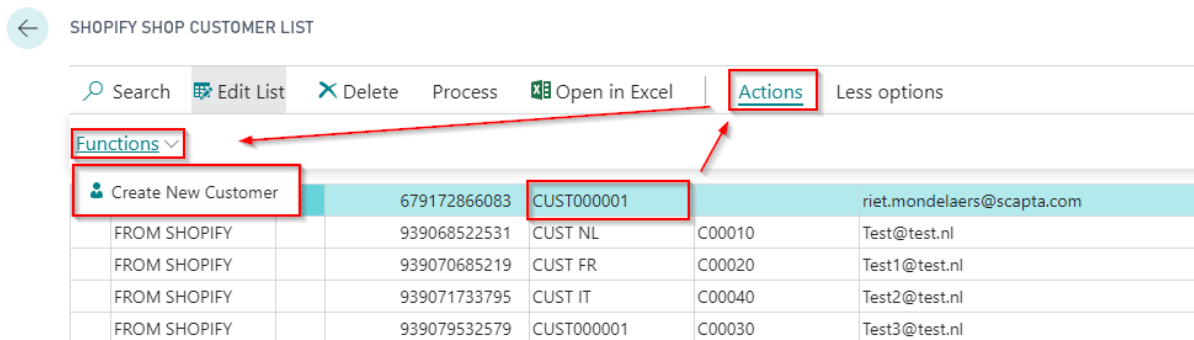
### 5.1.4 Manually create customers

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'.



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



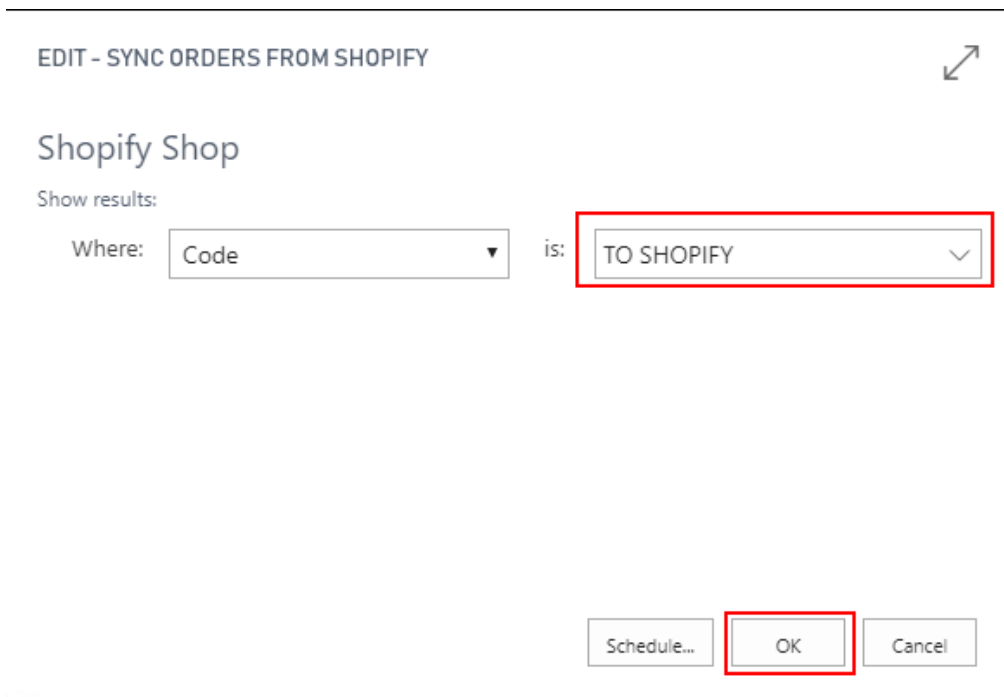
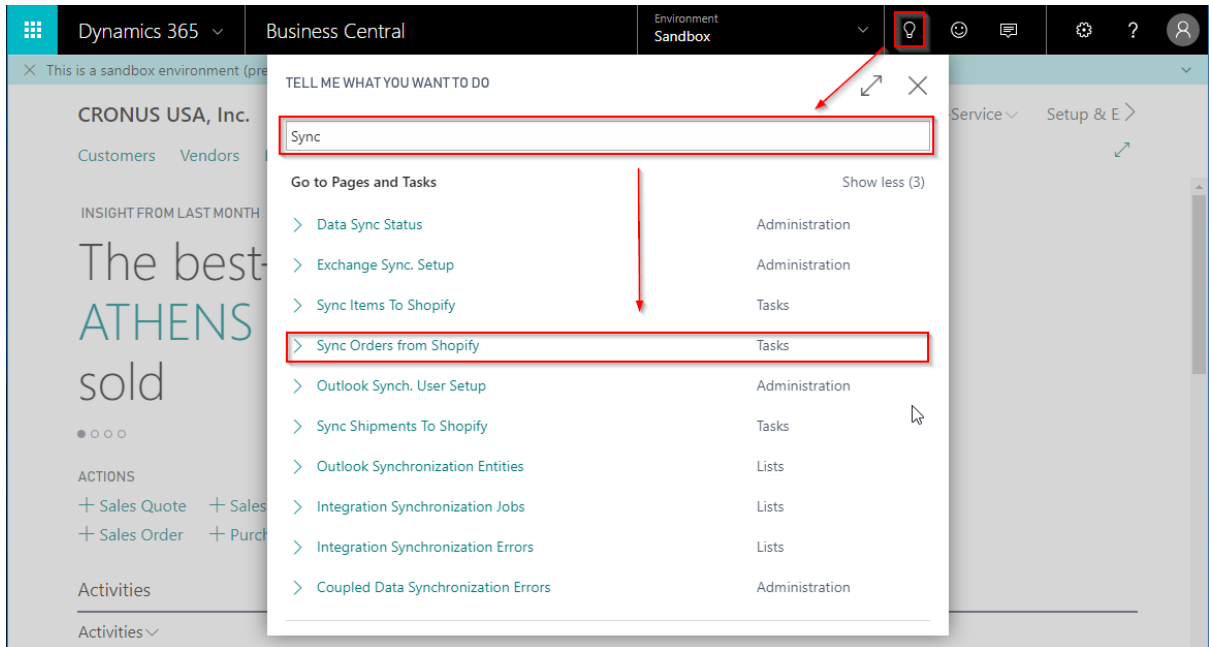
## 5.2 Execute Order Synchronization

### 5.2.1 By batch task

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

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



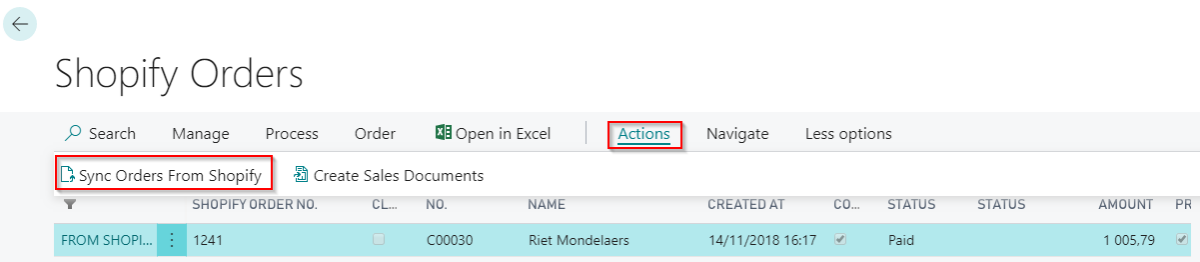
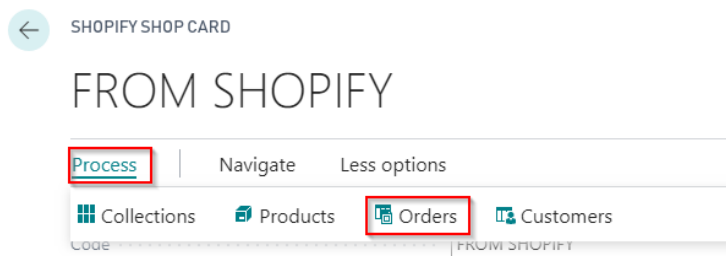


When executing this task, the Shopify Orders are imported in Dynamics 365 Business Central.



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

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



### 5.2.3 By job queue

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

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



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



← 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 Mondays  Run on Saturdays

Run on Tuesdays  Run on Sundays

Run on Wednesdays  Starting Time: 8:00:00

Run on Thursdays  Ending Time: 18:00:00

Run on Fridays  No. of Minutes between ...: 1

Inactivity Timeout Period: 0

### 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

Dynamics 365 Business Central Environment Sandbox

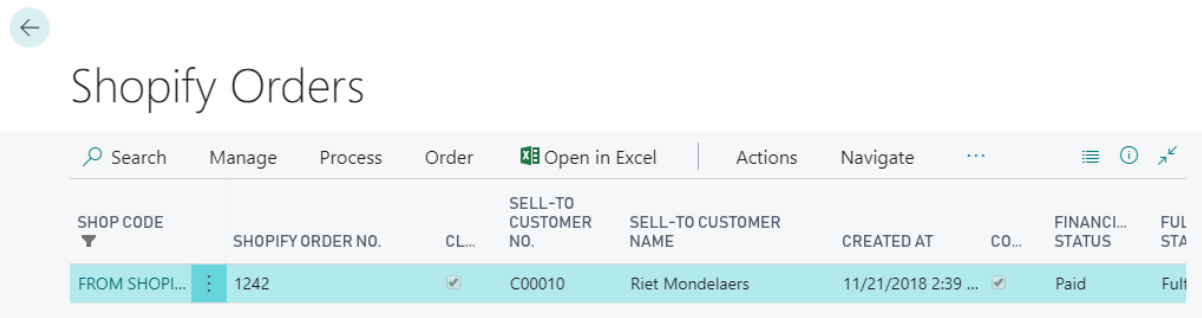
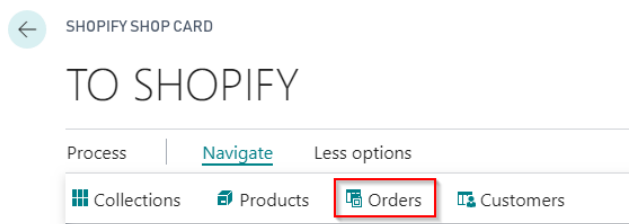
CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Approvals | Self-Service | Setup & Extensions | Intelligent Cloud Insights | **Shopify**

Connector Shops **Orders**



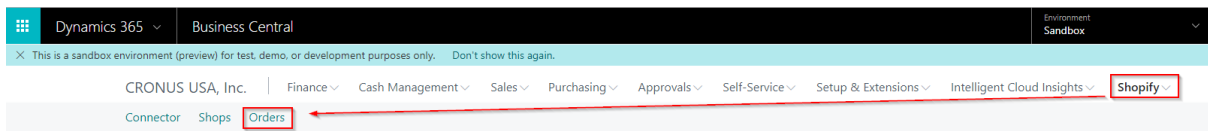
### 5.3.2 Shopify Orders of a specific shop

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



### 5.4 Process Shopify Orders

Navigate to the Shopify Orders.



Edit the Shopify order.



← SHOPIFY ORDER ✎ + 🗑

1241 · Riet Mondelaers

Process Order | Actions Navigate Less options

---

**General** Show more

Shop Code	FROM SHOPIFY	Email	rietmondelaers@scapta.com
Shopify Order No.	1241	Phone No.	
Sell-to Customer No.	C00030	Test	<input type="checkbox"/>
Closed	<input type="checkbox"/>	Created At	14/11/2018 16:17
<b>SELL-TO</b>		Document Date	14/11/2018
Name	Riet Mondelaers	Processed	<input type="checkbox"/>
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	<input type="checkbox"/>
		Error Message	

---

**Lines**

ITEM NO.	UNIT OF MEASURE CODE	VARIANT CODE	DESCRIPTION	VARIANT DESCRIPTION	QUANTITY	UNIT PRICE	DISCOUNT AMOUNT	FUL Q
1896-S	PCS	BLACK	ATHENS Desk	BLACK	1	1 000.80	0,00	

---

**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 rietmondelaers@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

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

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

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: 70007605  
Description: Shopify Create Sales Orders  
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 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

Address ..... Kempische steenweg 311

Address 2 .....

Post Code ..... 3500

City ..... Hasselt

Email ..... riet.mondelaers@scapta....

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 .....



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	QUANTI
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



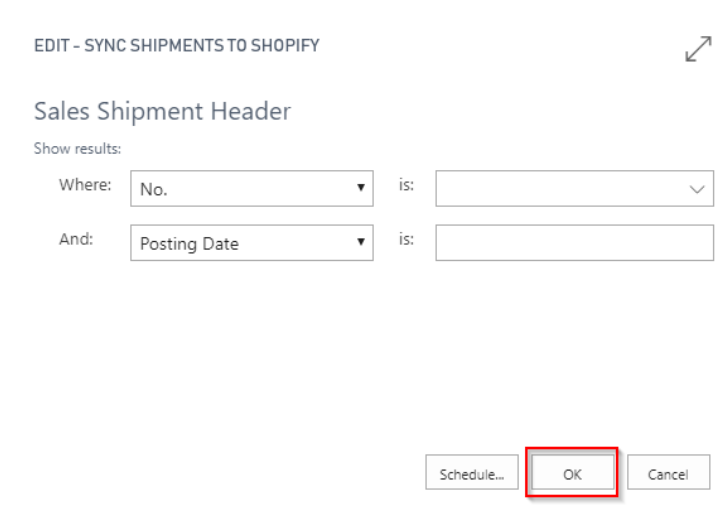
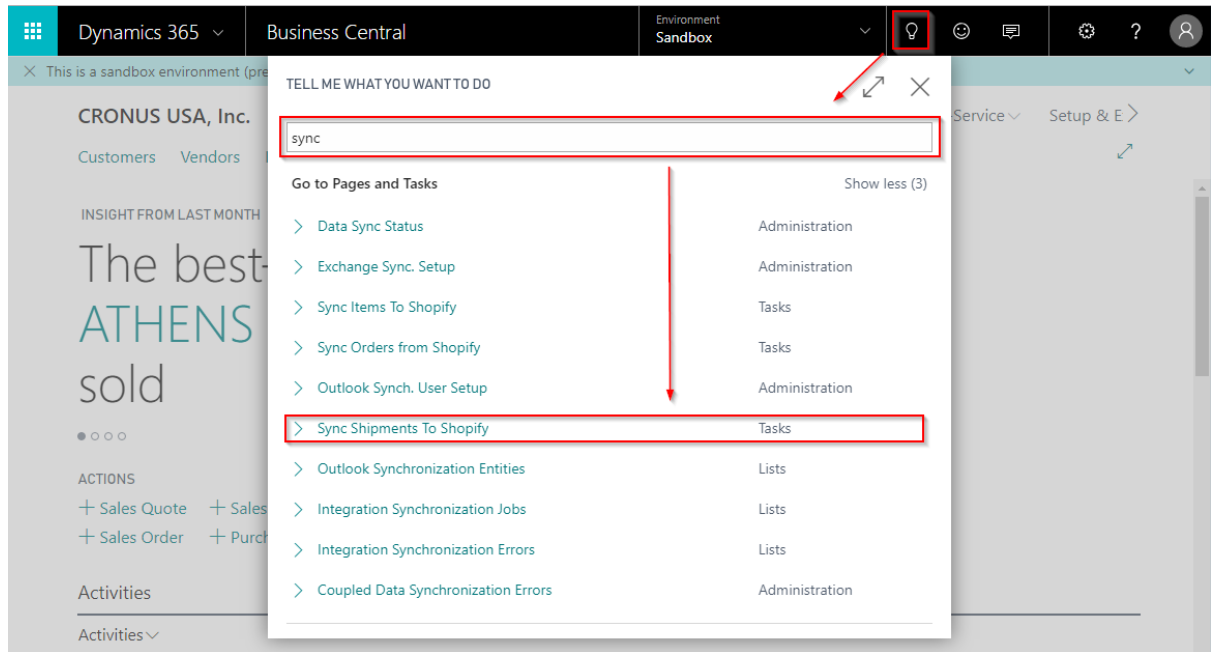
**AMSTERDAM Lamp × 1**  
BLUE / PCS

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

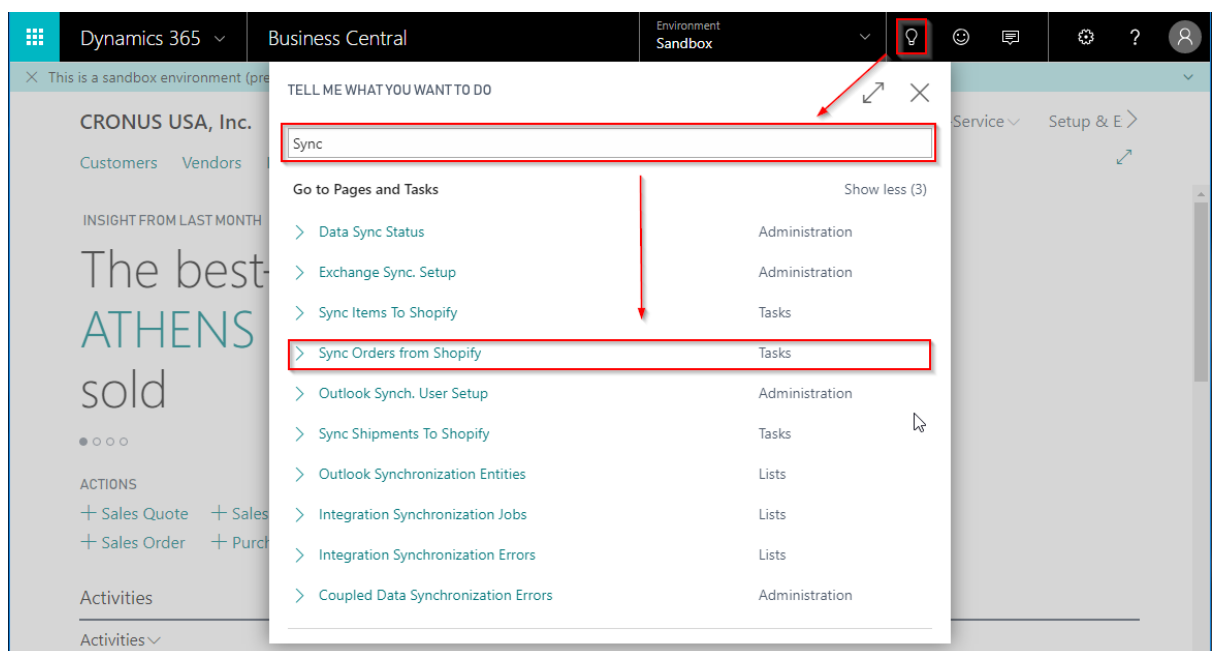
You can find the job queue entries by using the search function from the Role Center:



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 ...	Description	Sync Shipments To Shopify
<a href="#">Sync Shipments To Shopify</a>		Earliest Start Date/Time	<input type="text"/> <span>📅</span> ...
		Status	On Hold

---

#### Report Parameters

Report Request Page Opti... <input checked="" type="checkbox"/>	Printer Name <input type="text"/> ...
Report Output Type <input type="text" value="None (Processing only)"/>	

---

#### Recurrence

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



