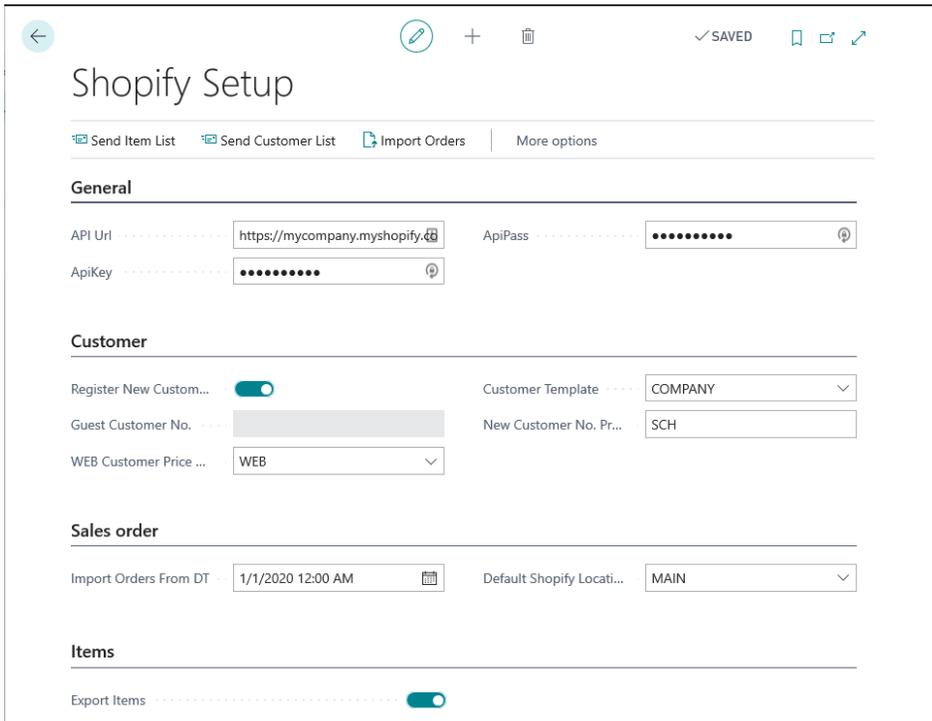# Shopify Connect User Manual

Contents

Setup

After installation of Shopify Connect extension into Microsoft Business Central, several setup tasks should be performed:

Shopify Setup

This is general part of setup

1. Choose the 🔍 icon, enter Shopify Setup, and then choose the related link.
2. This will open Setup page:

On the General fastTab

3. **API Url** = address of your Shopify administration page. It should be like https://mycompany.myshopify.com/admin/ .
4. **ApiKey** = API key from Shopify Private Apps page. (see section "Generate Shopify API key and password")
5. **ApiPass** = Password from Shopify Private Apps page. (see section "Generate Shopify API key and password")

On the **Customer** fastTab

System identifies shopify sales order customer by searching it's e-mail address in customer list. User can choose system behaivour when it receives order from unknown customer – 1) for every new customer create new Customer Card , or 2) use one generic Customer card (guest customer) to register such sales orders.

6. If user wants that system create use one generic customer:
   a. switch-off selector **Register New Customer**
   b. insert that generic customer number in field **Guest Customer No.**
7. If user wants that system for every new customer create new Customer Card:
   a. switch-on selector **Register New Customer**
   b. select template code in **Customer Template.** System will use this template to create new customer data. Please check that template has values in fields Gen. Bus. Posting Group, VAT Bus.Posting Group and Customer Posting Group.
   c. Insert prefix in **New Customer No. Prefix** if you want that new customer number have prefix before number, to separate those customer from other.
8. If user wants to send customer information from system to Shopify:
   a. select curtomer price group code in **Web Customer Price Group**
   b. in customer data for customers that should be sent to Shopify, set Customer Price Group code same as in Shopify Setup field **Web Customer Price Group**

Warning – when you set **Web Customer Price Group** in Shopify Setup and in Customer cards, system will automatically send new and updated customers information to Shopify.

On the **Sales Order** fastTab

9. **Import Orders From DT** = Insert here date&time if you don't want to impoert orders older then this date&time.
10. **Default Shopify Location** = insert here location code, that will be used for imported sales orders.

On the **Item** fastTab

11. **Export Items** = switch-on selector if you want to export Item information (new items, updated items) from system to Shopify. This will need additional setup (see "Item Export Setup").

Generate Shopify API key and password

For Business Central to be able to connect to Shopify, it is needed to create private app connection inside Shopify security settings.

1. visit page https://mycompany.myshopify.com/admin/apps, choose **Manage private Apps**

2. if you don't have private apps in the list, press **Create a new private app**
3. insert new private app name and e-mail address

App details

These details can help you keep track of your private apps and stay informed about changes that affect your app.

Learn more.

Private app name

NAV Shopify Connector

Emergency developer email

@jemel.lv

4. give app credentials - view/mod customers, view/mod products, view/mod orders etc.

ADMIN API PERMISSIONS

Store content like articles, blogs, comments, pages, and redirects read_content, write_content	Read and write
Customer details and customer groups read_customers, write_customers	Read and write
Draft orders write_draft_orders, read_draft_orders	Read and write
Fulfillment services read_fulfillments, write_fulfillments	Read and write
Order editing write_order_edits, read_order_edits	Read and write
Orders, transactions and fulfillments read_orders, write_orders	Read and write
Discounts - PriceRule REST and GraphQL API read_price_rules, write_price_rules	Read and write
Product information read_product_listings, write_product_listings	Read and write
Products, variants and collections read_products, write_products	Read and write

5. press **Save**
6. in Private apps list find your new app and open it (click on name)
7. your app key and password will be displayed in fields:

API key

1? .15° .r4fa⁻ ⹁36⁵° ⹁19d⁻ ⹁rd¹⹁ .

Password

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Item Export Setup

Before exporting Items from system to Shopify product list, user must

- create/update Item Categories list in system and
- create/update Collections list in Shopify.

Item will be exported to Shopify only if item is applied to Item Category that exists in Collection list in Shopify.

1. Choose the 🔍 icon, enter Item Categories, and then choose the related link.
2. Code = code of Item Category, ex. CHAIR
3. Description = description of category, ex. Office Chair

4. Choose the 🔍 icon, enter Items, and then choose the related link.
5. For each Item, that will be exported to Shopify, open Item Card, and select value in filed Item Category Code

6. In Shopify Admin page, create list of equivalent collections
   a. Open collections webpage, https://mycompany.myshopify.com/admin/collections
   b. press Create Collection,

  c. **Title** = must be same as system's Item Category Code.

  d. **Collection Type** = must be Manual.

Warning – when you set **Export Items** switch on in Shopify Setup and create Item Category list, system will automatically send new and updated items information to Shopify.

Mapping of fields you can find in section "Items export – fields mapping".

Note - from Business Central to Shopify will be send list of items together with Item sVariants.

Automatic data export - import

To setup automatic actions (export of customer and items, and import of new sales orders):

1. Choose the 🔍 icon, enter Shopify Setup, and then choose the related link.
2. Press **Action**, then **Functions**, open group of actions **Job Queue Entry**
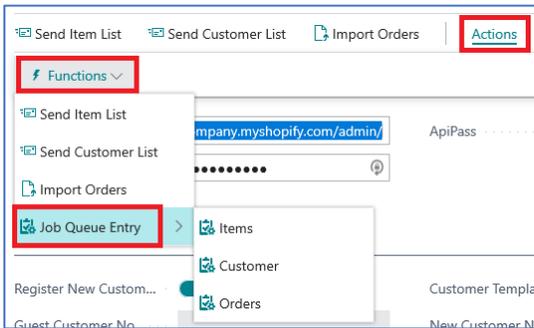
3. Select action then you want to setup as automatic regular job:
   a. Items - to send item list to Shopify
   b. Customers – to send customer list to Shopify
   c. Orders – to receive sales orders from Shopify
4. In window Job Queue Enntry, select how often job will run, and set status Ready.

Manual Items Export

To export item list to Shopify manually:

1. Choose the 🔍 icon, enter Shopify Setup, and then choose the related link.
2. Press **Send Item List**

3.   Press **Yes**

Manual Customers Export

To export customer list to Shopify manually:
1.   Choose the 🔍 icon, enter Shopify Setup, and then choose the related link.
2.   Press **Send Item List**

3.   Press **Yes**

Manual Orders Import

To import new sales orders from Shopify manually:
1.   Choose the 🔍 icon, enter Shopify Setup, and then choose the related link.
2.   Press **Send Item List**

3.   Press **Yes**

Note – when system is importing orders, it checks whether this Order already exists in system by filtering existing Sales Oredrs (and Posted Sales Invoices) with value ” Your Reference” = Shopify order ID.

Orders Release

When user in Business Central is releasing Order (ig. press ”Release” in Sales Order card), system will send to Shopify command to update order's fullfilment status to value ”Fullfilled”. When user after that will reopen this order, system will send to Shopify command to update order's fullfilment status to value ”Canceled”.

Items export – fields mapping

If in Business central user have settings for export Items from system to Shopify, system will use following mapping of fields:

Business central, table Item (or Variant)	Shopify
Description	title
Description	body-html
No.	handle
Name of Vendor	vendor
Item Category Code	tags
Unit Price	price
No. + "_" + Variant Code	sku
Net Weight * 1000	grams
Net Weight	weight
'kg'	weight-unit
'continue'	inventory-policy
Item Cross Reference - Cross-Reference No.	barcode
'manual'	fulfillment-service
'shopify'	inventory-management
Inventory	inventory-quantity

Customer export – fields mapping

If in Business central user have settings for export customers from system to Shopify, system will use following mapping of fields:

Business central, table Customer	Shopify
Name (first part before Space)	first_name
Name (last part before Space)	last_name
E-Mail	email
Phone No.	phone
	default_address
Address	address1
Address 2	address2
City	city
County	province
Country -> Name	country-name
Country/Region Code	country-code
Post Code	zip

Orders import – fields mapping

When Business Central is importing orders from Shopify, system will use following mapping of fields:

Business central, table Sales Header and Sales Line	Shopify
Sales Header	
Order Date	created-at

	billing-address
Bill-to Name	name
Bill-to Address	address1 + address2
Bill-to City	city
Bill-to Post Code	zip
Bill-to Country/Region Code	country-code
	shipping-address
Sell-to Customer Name	name
Sell-to Address	address1 + address2
Sell-to City	city
Sell-to Post Code	zip
Ship-to County	province
Sell-to Country/Region Code	country-code
Ship-to Name	first-name + last-name + company
Ship-to County	province
Sales Line	
Type = Item	
No.	--search for Item No. with logic below
Quantity	quantity
Unit Price	price
Line Discount Amount	total-discount

Note – when system is importing orders, it checks whether this Order already exists in system by filtering existing Sales Oredrs (and Posted Sales Invoices) with value " Your Reference" = Shopify order ID.

Seach for Item in Shopify order – when system is importing order from Shopify, it searches form item with following logis

- system takes value from 'sku' field and try to find Item with equivalent No. If not foudn then...
- system seach for product information in Shopify, takes field 'handle' try to find Item with equivalent No. If not foudn then...
- system searches value from 'sku' field in Item Cross Reference table.