

Microsoft Dynamics 365 Business Central

Integration with Shopify

Course Description:

This learning path provides a deep dive into the Shopify connector in Dynamics 365 Business Central, equipping you with the knowledge and skills to effectively integrate your Shopify store with your ERP system. You'll learn how to set up the connector, synchronize items, inventory, customers, sales orders, transactions, and payouts between the two platforms, and streamline your business operations.

Audience Profile:

This course is designed for individuals who are familiar with Dynamics 365 Business Central and Shopify. It is particularly suitable for:

- Functional consultants
- Business users
- Individuals seeking to enhance their skills in e-commerce integration

Prerequisites:

- Basic understanding of Dynamics 365 Business Central navigation
- Shopify app installed in Business Central
- Shopify trial or partner account
- Familiarity with Shopify web shop
- A Shopify store for practicing exercises
- Good understanding of posting groups, sales processes, and job queue functionality in Business Central

Course Objectives:

- Learn how to set up and configure the Shopify connector in Dynamics 365 Business Central.
- Master the synchronization of items, inventory, customers, sales orders, transactions, and payouts between Shopify and Business Central.
- Optimize your business operations by leveraging the integration of Shopify and Dynamics 365 Business Central.
- Gain insights into best practices for managing Shopify orders and fulfilling shipments within Business Central.
- Effectively reconcile transactions and payouts between the two platforms.

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- Overview of the Shopify connector and its benefits
- Creating a Shopify account and activating test payments
- Installing the Shopify app in Business Central
- Prerequisites for proceeding with the course

Module 2: Setting Up the Shopify Connector

- Creating Shopify shops in Business Central
- Setting up locations, shipment methods, and payment methods
- Exercise: Create a Shopify shop and map locations, payment methods, and shipment methods

Module 3: Synchronizing Items and Inventory

- Setting up item synchronization
- Importing and exporting items between Shopify and Business Central
- Synchronizing item images, prices, and inventory
- Scheduling job queue entries for synchronization
- Exercise: Sync items and inventory to Shopify

Module 4: Synchronizing Customers

- Setting up customer synchronization
- Creating customer templates and setting up taxes
- Importing and exporting customers in bulk
- Scheduling job queue entries for synchronization
- Exercise: Sync customers to Shopify

Module 5: Synchronizing and Fulfilling Sales Orders

- Setting up sales order synchronization
- Syncing Shopify orders to Business Central
- Creating sales documents in Business Central
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- Exercise: Sync Shopify orders and create sales documents

Module 6: Synchronizing Transactions and Payouts

- Mapping payment methods
- Reconciling incoming transfers
- Reviewing transactions and payouts