V210 Commerce Edition (Shopify Connector)

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Timing and Agenda

June 8, 2021   10 AM PT -12 PM PT

Day 1

Lesson 1.1: Initial Configuration

Lesson 1.2: Manual Synchronization

June 9, 2021   10 AM PT -12 PM PT

Day 2

Lesson 2.1: Bi-Directional Synchronization of Customers

Lesson 2.2: Synchronization of Customer Locations

Lesson 3.1: Synchronization of Template Items

Lesson 3.2: Synchronization of Images

Lesson 3.3: Synchronization of Product Availability

Timing and Agenda

June 10, 2021   10 AM PT - 12 PM PT

Day 3

Lesson 4.1: Synchronization of Taxes

Lesson 4.2: Import of Credit Card Payments (Authorize.Net)

Lesson 4.3: Payments with Gift Certificates

Lesson 4.4: Purchase of a Product with Variants

Lesson 4.5: Import of an Order with Discounts

June 11, 2021   10 AM PT - 11 AM PT

Day 4

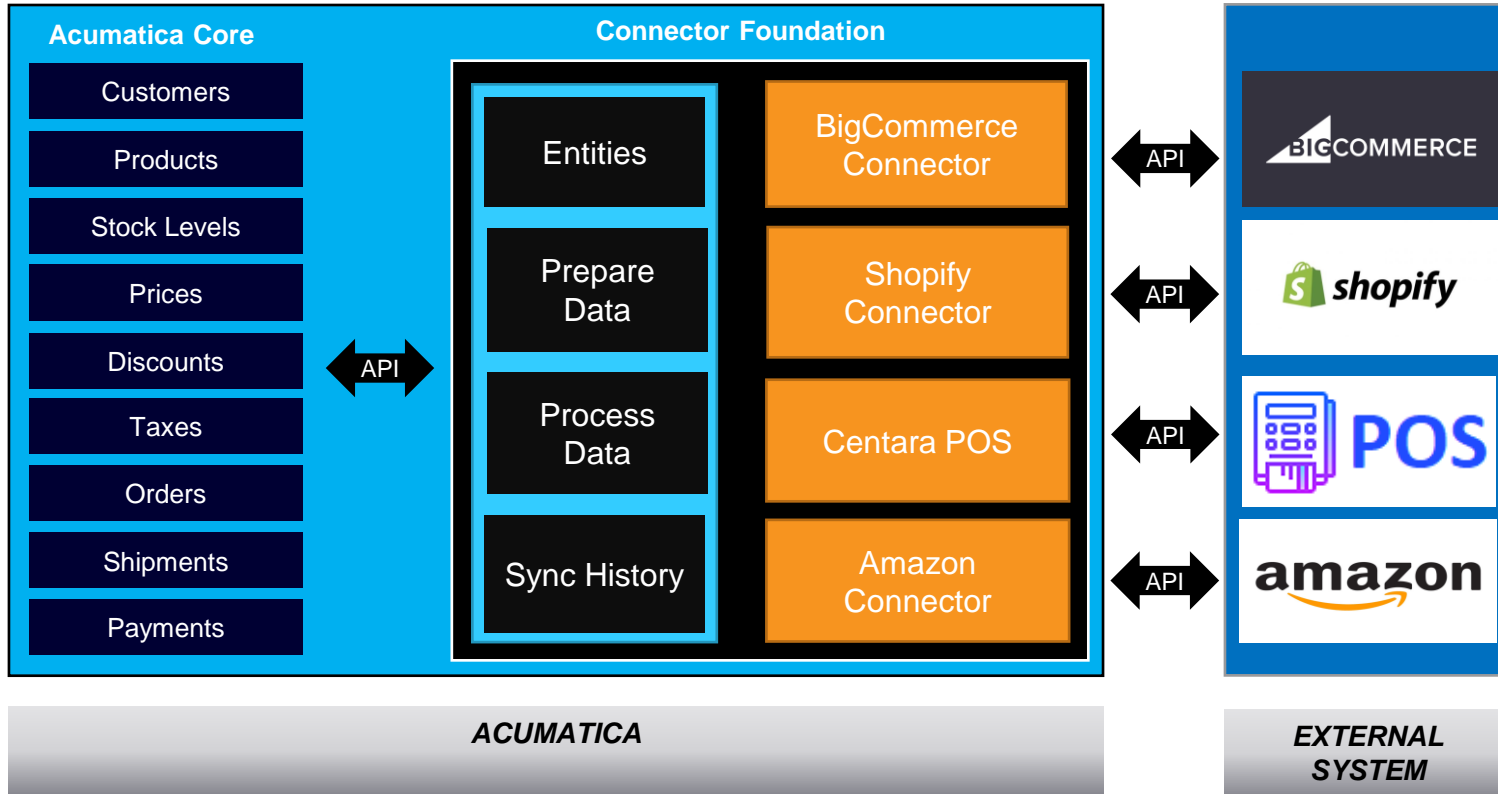Lesson 5.1: Scheduling Synchronization

Lesson 5.2: Monitoring Day-to-Day Commerce Operations and Troubleshooting

Day 1

Part 1: Initial Configuration and Manual Synchronization

Commerce Connector Architecture Design

Acumatica Core

- Customers
- Products
- Stock Levels
- Prices
- Discounts
- Taxes
- Orders
- Shipments
- Payments

Connector Foundation

- Entities
- Prepare Data
- Process Data
- Sync History

- BigCommerce Connector
- Shopify Connector
- Centara POS
- Amazon Connector

API

ACUMATICA

EXTERNAL SYSTEM

Lesson 1.1: Initial Configuration

Learning Objectives

In this section, you will learn what general steps are involved in establishing a connection between Acumatica ERP and a Shopify store and in performing the initial configuration of data synchronization.

Initial Configuration: To Set Up a Shopify Store

Story

The SweetLife Fruits & Jams company is planning on opening an online store built on the Shopify platform. The store's warehouse, from which the goods sold online will be shipped, is based in New York. The company maintains the prices of its products in U.S. dollars and delivers products across New York by using the company's own vehicles.

As an implementation consultant helping SweetLife to implement the integration between Shopify and Acumatica ERP, you want to set up a new store and perform the minimum required configuration of the Shopify store that will be sufficient to proceed with the configuration of the integration.

Initial Configuration: To Prepare the Acumatica ERP Instance

Story

The SweetLife Fruits & Jams company is planning on opening an online store built on the Shopify platform. The store's warehouse, from which the goods sold online will be shipped, is based in New York. The company maintains the prices of its products in U.S. dollars and delivers products across New York by using the company's own vehicles.

As an implementation consultant helping SweetLife to implement the integration between Shopify and Acumatica ERP, you want to make sure that the features required for the e-commerce functionality are enabled and the necessary entities are created and configured in the Acumatica ERP instance.

Initial Configuration: To Establish and Configure the Store Connection

Story

Suppose that the SweetLife company wants to sell jam in its online store deployed on the Shopify platform. SweetLife is already using Acumatica ERP and now needs to integrate its instance with a new Shopify store.

As SweetLife's implementation consultant, you need to configure the connection to the Shopify store and perform the minimum configuration required for synchronization of data between Acumatica ERP and the store.
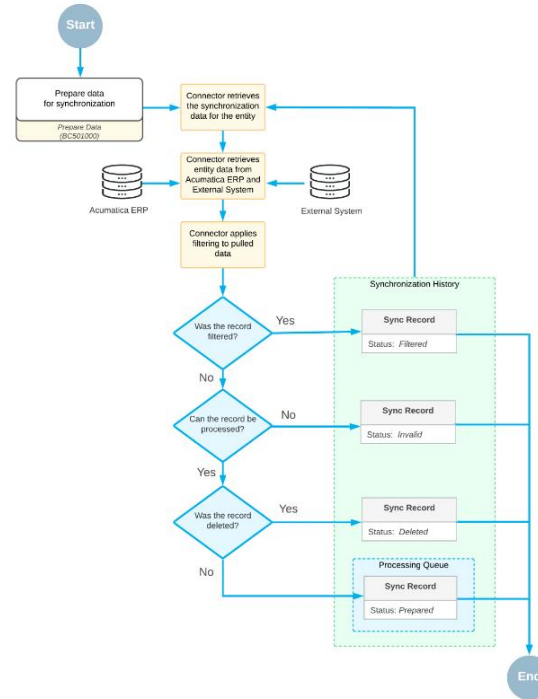
Lesson 1.2: Manual Synchronization

Learning Objectives

In this lesson, you will learn how data synchronization works and how to synchronize data manually.

Preparing data for synchronization

Preparing data for synchronization

Preparing Data for Synchronization – Flow Chart

Synchronization Statuses

Status	Description
Prepared	The synchronization record has been created or updated, but out-of-sync data has not been saved in the destination system or systems.
Processed	The synchronization record has been processed, and data has been recorded to the destination system or systems according to the synchronization settings configured for the entity.
Failed	The processing of the synchronization record has failed and data could not be recorded to the destination system or systems.
Aborted	The synchronization record was excluded from synchronization by the system. The system automatically assigns the *Skipped* status to a synchronization record if the processing of the synchronization record has failed the number of times specified for the entity in the **Max. Number of Failed Attempts** box on the *Entities* (BC202000) form. The information about the error that occurred during the synchronization is available for the synchronization record in the **Last Error** column of the table on the *Sync History* form.
Skipped	The synchronization record was manually excluded from synchronization by a user.
Deleted	The record in the synchronization record has been deleted in one system or both systems.
Invalid	The synchronization record cannot be processed because its synchronization is not possible.
Filtered	The entity has been filtered as a result of applying a filter defined in the code or on the *Entities* form.

Acumatica
The Cloud ERP

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Data Synchronization: To Perform the First Synchronization

Story

Suppose that you are an implementation consultant helping the SweetLife Fruits & Jams company to set up an online store. You have completed the minimum initial configuration of the integration with Shopify and now want to explore how synchronization works.

You will configure synchronization for and then synchronize a subset of stock items that are maintained in Acumatica ERP (stock items of the *Jam* item class) with the Shopify store.

You will then perform a test purchase of one of the synchronized products and explore how the online order is processed in the Shopify store and in Acumatica ERP.

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The Cloud ERP

Day 2

Part 2: Synchronization of Customers and Customer Locations

Lesson 2.1: Bi-Directional Synchronization of Customers

Learning Objectives

In this lesson, you will learn how to set up the bidirectional synchronization of customers and performing the synchronization of customers between Acumatica ERP and the Shopify store.

Synchronizing Customers: To Perform Bidirectional Synchronization

Story

Suppose that the SweetLife Fruits & Jams company has multiple corporate customers from the United States and Canada in the system. The company wants only customer records for US customers (which are assigned to the *DEFAULT* customer class) to be synchronized between Acumatica ERP and the Shopify store.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the Shopify store, you need to configure the bidirectional synchronization of customer records that belong to the *DEFAULT* customer class, test the synchronization, and explore the synchronization results.

Lesson 2.2: Synchronization of Customer Locations

Learning Objectives

In this lesson, you will learn how to set up the synchronization of customers along with their locations (addresses) and perform the synchronization of customers with locations between Acumatica ERP and the Shopify store.

Synchronizing Customers: To Synchronize Customers with Multiple Locations

Story

Suppose that the SweetLife Fruits & Jams company works with corporate customers that order items to be delivered to multiple locations. The company keeps track of customer addresses in the Shopify store and wants these addresses to be in sync with customer locations in Acumatica ERP.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the Shopify store, you need to configure the synchronization of customer locations between the two systems, as well as test it and explore how the synchronization works in both systems.

Part 3: Synchronization of Products

Lesson 3.1: Synchronization of Template Items

Learning Objectives

In this lesson, you will learn how to synchronize products with variants (called *matrix items* in Acumatica ERP).

Synchronizing Products: To Sync Items with Variants

Story

Suppose that SweetLife Fruits & Jams company is going to sell juices in its Shopify online store.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the Shopify store, you need to export the *JUICE* template item to the Shopify store.

Lesson 3.2: Synchronization of Images

Learning Objectives

In this lesson, you will learn how to synchronize product images between Acumatica ERP and the Shopify store.

Synchronizing Products: To Sync Product Images

Story

Suppose that the SweetLife Fruits & Jams company wants to store some images of the products it sells in the online store in an external storage. Some of the images, however, are attached to items in the Acumatica ERP instance.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the Shopify store, you want to test how images stored in Acumatica ERP are exported to the Shopify store.

Lesson 3.3: Synchronization of Product Availability

Learning Objectives

In this lesson, you will learn how to do the following:

- Define the availability settings to be applied by default to stock items, non-stock items, and template items exported to the Shopify store

- Define the availability settings for a particular stock item, non-stock item, or template item exported to the Shopify store

- Synchronize the availability of stock items, non-stock items, and template items between Acumatica ERP and the Shopify store

Synchronizing Product Availability: Activity

Story

Suppose that the SweetLife Fruits & Jams company sells several kinds of jams in its online store. Some jams need to always be available for purchase online, while the others are made available for purchase online only when there is enough stock.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the Shopify store, you want to explore how various availability settings specified for stock items affect the results of the synchronization of the *Product Availability* entity between Acumatica ERP and Shopify.
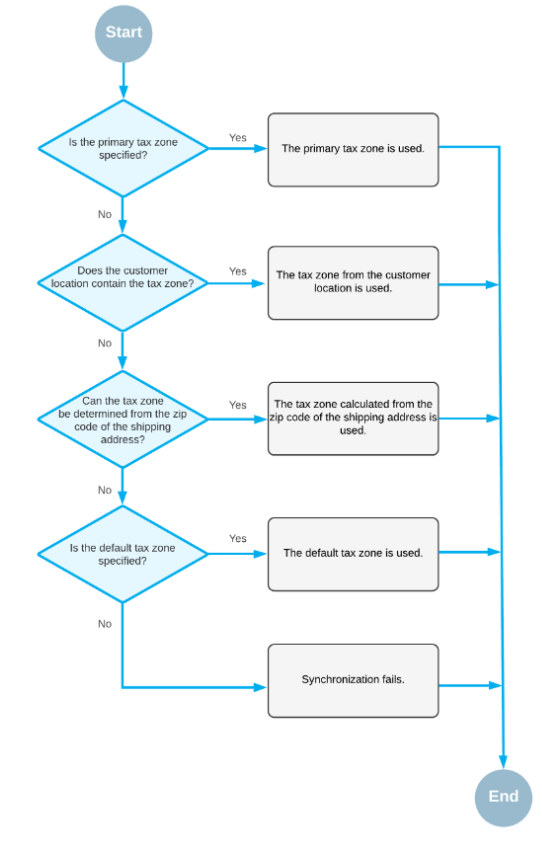
Day 3

Part 4: Synchronization of Orders

Lesson 4.1: Synchronization of Taxes

Learning Objectives

In this lesson, you will learn how to manually configure the synchronization of taxes between the Shopify store and Acumatica ERP.

Determining the tax zone for tax calculation

Start

Is the primary tax zone specified? — Yes → The primary tax zone is used.

No ↓

Does the customer location contain the tax zone? — Yes → The tax zone from the customer location is used.

No ↓

Can the tax zone be determined from the zip code of the shipping address? — Yes → The tax zone calculated from the zip code of the shipping address is used.

No ↓

Is the default tax zone specified? — Yes → The default tax zone is used.

No ↓

Synchronization fails.

End

Synchronizing Orders: To Configure Tax Synchronization

Story

Suppose that SweetLife is using only Acumatica ERP (without an external tax provider) for calculating and reporting taxes on the goods and services it sells.

As an implementation consultant helping SweetLife to set up a Shopify store, you need to set up taxes in the store and then make sure that the taxes on online sales orders are correctly passed to Acumatica ERP when the orders are imported.

Lesson 4.2: Import of Credit Card Payments (Authorize.Net)

Learning Objectives

In this lesson, you will learn how to do the following:

- Configure the mapping of card-based payment methods in Acumatica ERP with store payment methods

- Import payments based on the card-based payment methods from the external e-commerce system

- Process credit card payments imported to Acumatica ERP

Lesson 4.2: Import of Credit Card Payments (Authorize.Net)

Processing an online order paid by a card
(Authorize.Net payment method; processing center configured)

Synchronizing Orders: To Configure and Import Card Payments

Story

Suppose that the SweetLife Fruits & Jams company wants to accept card payments in the Shopify store. The company already has the Authorize.Net account for processing card payments.

Acting as an implementation consultant helping SweetLife to set up the integration of Acumatica ERP with the Shopify store, you need to configure Authorize.Net as a card payment provider in the Shopify store, configure the card payment processing in Acumatica ERP, and then configure the import of card payments from the Shopify store to Acumatica ERP.

Lesson 4.3: Payments with Gift Certificates

Learning Objectives

In this lesson, you will learn how to implement gift cards in the Shopify store and explore how gift cards can be used to pay, in full or in part, for an online purchase in the Shopify store.

Synchronizing Orders: To Sell and Accept Gift Cards

Story

SweetLife wants to give its online customers the ability to purchase gift cards and use these cards when purchasing goods in the SweetLife online store.

As an implementation consultant, you need to configure the gift card functionality—that is, the ability to sell gift cards as items and use the cards as payment methods—and test it.

Lesson 4.4: Purchase of a Product with Variants

Learning Objectives

In this lesson, you will learn how to purchase products with variants in the Shopify store and importing the order with such products to Acumatica ERP.

Synchronizing Orders: To Import Orders Containing Products with Variants

Story

Suppose that SweetLife Fruits and Jams sells juices (which are matrix items based on the *JUICE* template item) in its Shopify store.

Acting as an implementation consultant helping SweetLife to set up the integration between Acumatica ERP and the Shopify store, you want to explore how online orders containing matrix items (product with variants) are imported to Acumatica ERP and review the results of the import.

Lesson 4.5: Import of an Order with Discounts

Learning Objectives

In this lesson, you will learn how to import orders that contain items with discounts.

Synchronizing Orders: To Import Orders with Discounts

Story

Suppose that the SweetLife store wants to offer discounts for some of the products that the company sells in its Shopify store.

As SweetLife's implementation consultant, you need to create an order with discounts of multiple types, import it to Acumatica ERP, and then explore how the applied discounts are displayed in the imported order.

Day 4

Part 5: Scheduling Synchronization and Troubleshooting

Lesson 5.1: Scheduling Synchronization

Learning Objectives

In this lesson, you will learn the following:

- How to set up automated synchronization of entities for standard and optimized performance

- How to enable real-time synchronization of an entity

- How to schedule the synchronization of an entity

Recommended Synchronization Setup for Lower Volumes

Entity	Real-Time Sync	Data Preparation	Data Processing
Sales Order	Start real-time synchronization; select the *Prepare & Process* real-time mode	Set up the schedule to prepare data once a night	Set up the schedule to process data once a night
Shipment	Start real-time synchronization; select the *Prepare & Process* real-time mode	Set up the schedule to prepare data once a night	Set up the schedule to process data once a night
Product Availability	Stop real-time synchronization	Set up the schedule to prepare data every 60 minutes	Set up the schedule to process data every 60 minutes
Other entities	Stop real-time synchronization	Set up the schedule to prepare data once a night	Set up the schedule to process data once a night

Recommended Synchronization Setup for Higher Volumes

Entity	Real-Time Sync	Data Preparation	Data Processing
Sales Order	Stop real-time synchronization	Set up the schedule to prepare data every 10 minutes	Set up the schedule to process data every 10 minutes
Shipment	Stop real-time synchronization	Set up the schedule to prepare data every 20 minutes	Set up the schedule to process data every 20 minutes
Product Availability	Stop real-time synchronization	Set up the schedule to prepare data every 60 minutes	Set up the schedule to process data every 60 minutes
Other entities	Stop real-time synchronization	Set up the schedule to prepare data once a night	Set up the schedule to process data once a night

Scheduling Synchronization: To Enable Real-Time Sync of Shipments

Story

As an implementation consultant helping SweetLife to set up integration with Shopify, you want to configure continuous synchronization of particular entities.

As part of the setup, you need to enable real-time synchronization of shipments so that shipments are exported to the Shopify website as soon as they are created or updated in Acumatica ERP.

Scheduling Synchronization: To Configure a Synchronization Schedule for Sales Orders

Story

As an implementation consultant helping SweetLife to set up integration with Shopify, you want to configure continuous synchronization of entities.

As part of the setup, you need to configure the system to capture new and changed sales orders in Shopify every 10 minutes and import these changes to Acumatica ERP.

Lesson 5.2: Monitoring Day-to-Day Commerce Operations

Learning Objectives

In this chapter, you will learn how to do the following:

- Monitor day-to-day e-commerce activities

- Identify synchronization issues and process individual synchronization records that the system failed to process

- Use business events to stay notified about synchronization records excluded from processing

Troubleshooting: To Monitor Day-to-Day E-Commerce Operations

Story

Suppose that you are Jerald Stevens, an eCommerce Manager at SweetLife Fruits & Jams. You start your day by checking how the synchronization of data between Acumatica ERP and the Shopify is going and whether any synchronization issues have occurred that require your attention. While reviewing the synchronization statistics, you notice that the some of the synchronization records have not been processed. You need to investigate and fix the issue and then manually resynchronize the failed synchronization records.

Troubleshooting: To Configure a Business Event

Story

Suppose that you want to receive an email notification every time the system excludes a synchronization records from processing (because it's failed to process the synchronization record too many times and set its status to *Aborted*). You need to set up a business event that will trigger sending an email message every time the status of a synchronization record changes to *Aborted*.

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Thank you

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Thank you