

Microsoft Dynamics 365/CRM Online to Shopify Integration

Overview

DBSync for Microsoft Dynamics 365/CRM & Shopify integration template is easy to use integration solution. It integrates Microsoft Dynamics 365/CRM Accounts, Products, and Opportunities with Shopify Customers, Products and Opportunities.




DBSync provides bidirectional integration between Microsoft Dynamics 365/CRM and Shopify. It offers pre-built, customizable field-to-field mappings along with the flexibility for more complex and dynamic mapping and data transformation capabilities.

The seamless solution integrates Microsoft Dynamics 365/CRM Accounts, Invoice Module and Products with Shopify Customer / Sales channels, Orders and Products respectively. DBSync's automatic online update enables its customers to enjoy all the product updates and features that come with every new release.

Track Order Fulfilment, AR and Inventory Update effectively.

Data Flow

The data flow of bidirectional integration between Microsoft Dynamics 365/CRM & Shopify is shown in the table below.

 Microsoft Dynamics 365/CRM		 shopify
Account		Customer
Opportunity/Order/ Invoice		Orders
Product		Product

The template of Microsoft Dynamics CRM and Shopify come as one project with the following data flows:

- Data flow from Microsoft Dynamics 365/CRM to Shopify:** This section explains the data flow from Microsoft Dynamics 365/CRM to Shopify platform. It is presented as per entity so that readers can understand the integration requirement and configure their template without any help from DBSync support team.
 - Product Integration:** The product integration data flow constitutes retrieving data from the Product object of the Microsoft Dynamics 365/CRM and, integrating it with Shopify as product.
 - Opportunity Integration:** The Opportunity integration data flow constitutes retrieving data from the Opportunity/Order/Invoice and Opportunityline/Orderline/Invoiceline Items object of Microsoft Dynamics 365/CRM and integrating it with Shopify as Orders and Orderline items.
- Data flow from Shopify to Microsoft Dynamics 365/CRM:** This section explains the data flow from the Shopify platform to Microsoft Dynamics 365/CRM. It is presented as per entity so that the readers can understand the integration requirement and configure their template without any help from DBSync support team.
 - Account Integration:** The customer integration data flow constitutes retrieving data from the Customer object of Shopify and integrating it with Microsoft Dynamics 365/CRM as Accounts.
 - Product Integration:** The Product integration data flow constitutes retrieving data from the Product object of Shopify and integrating it with the Microsoft Dynamics 365/CRM as Product.

Prerequisites For Integration

Take following steps to facilitate the data flow between Microsoft Dynamics 365/CRM and Shopify:

- Have a valid license to DBSync Shopify and Microsoft Dynamics 365/CRM connector.
- Have a valid Username, Password, Account ID to access Shopify web service and, Application ID.
- Have a valid Username, Password of the Microsoft Dynamics 365/CRM production instance.
- Rightly configure connections to respective applications via connector page of the standard template provided by DBSync.

Getting Started With DBSync

1. Go to www.mydbsync.com & register for a Free Trial. Ensure that Source & Target Adapters Microsoft Dynamics 365/CRM & Shopify respectively and fill in the User registration form to complete registration.

2. An Email will be triggered from dbsync-notification@mydbsync.com to the registered Email ID. Click on the activation link to activate your DBSync account.
3. Login to your DBSync account. Click on template library and import the Microsoft Dynamics 365/CRM & Shopify Bidirectional Integration template to your workspace.
4. Clicking on "Launch Development studio" will redirect the user to connectors landing page. Configure Microsoft Dynamics 365/CRM and Shopify connectors respectively by following the steps listed in the link [Shopify Connector](#).
5. Run the integration by following the steps listed in the latter section of "Running The Integration".

Running The Integrations

DBSync integration of Salesforce & Shopify can be triggered by:

1. Clicking on "Run Now" button from process listing page of DBSync.
2. Using "DBSync scheduler".

Clicking "Run Now" button from DBSync platform.

The user has to login to DBSync with his/her valid credentials and click the "Run Now" button from the process listing page or from the workflow listing page.

Using DBSync Scheduler

Scheduler available in DBSync account can be used to schedule integrations. Details pertaining to usage of DBSync scheduler is available from the link [Scheduler](#).