



DEAR Shopify Integration Explained

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Multiple Stores

It is possible to link several Shopify stores to a single Dear account. Each linked store has independent catalogue, logs and settings.

Dear Account is billed for each additional store besides the first one included in the Large plan.

You can find current price for additional store link on Shopify Setup page in your Dear account

Integration settings

When to capture order

You have an option to choose when Shopify Order is captured: when it is created, when it is shipped or when it is paid in Shopify. This setting is also taken into account when you trigger download of historical orders from Shopify.

Order consolidation

Dear-Shopify integration can work in two modes defined by Consolidation Type parameter

- No Consolidation
- Daily Consolidation

This parameter defines how DEAR processes captured pending orders. When Consolidation Type is Daily Consolidation additional parameter becomes available: Consolidation time. This is your **local** time when all pending orders aggregated during the day will be processes.

See Pending Order Processing section for more details below.

Customer

You need to select existing customer on Shopify settings page in order for the pending order processing to work.

When Consolidation Type is Daily Consolidation, this customer is used to create new sale task which will combine all daily sales.

When Consolidation Type is No Consolidation, this customer may be used in case when customer information is not attached to Shopify sale (in case of POS sales for example). If customer info exists in Shopify sale order then this customer defined in Settings is ignored.

Use company as a Customer

This parameter only has an effect when No Consolidation option is selected.

In Shopify, each sale order has optional field Company which can be filled in by a customer. If you would like DEAR to create customer with the name of the company (instead of the Customer name attached to sale order in Shopify) you need to tick this box.

Invoice Lines Tax Rule

When pending order is processed by DEAR sale task is created with order and invoice lines filled in. Tax rule specified in this setting is used to create these lines. The trick is DEAR is not applying this tax rule to recalculate tax, but is using calculated tax from Shopify order. That means if you have some

products not Taxable or with varying tax in Shopify, all data and totals in DEAR will look exactly like in Shopify, but with tax rule name selected in this setting.

Invoice Additional Charges Tax Rule

When pending order is processed by DEAR sale task is created with invoice additional charges reflecting shipping and discounts filled in. Tax rule specified in this setting is used to create these lines. The trick is DEAR is not applying this tax rule to recalculate tax, but is using calculated tax from Shopify order. That means all data and totals in DEAR will look exactly like in Shopify, but with tax rule name selected in this setting.

Pick, Pack and Ship processing mode

When pending orders are processed by DEAR new sale tasks are created. This setting tells Dear if it should try to Auto Pick, Auto Pack and Auto Ship these tasks. If there is not enough stock on hand to pick full quantity of products in sale task, then pick will remain in Draft state and Pack and Ship won't be filled in.

DEAR does not pick up shipment information from Shopify at the moment when doing auto-ship and won't create Fulfilment in Shopify in this scenario (if Auto Ship is enabled).

Invoice Status

You can control Invoice Status for Sale task created as a result of pending order processing. By default Invoice won't be authorised and will be in Draft state, adjustable and waiting for authorisation. But if this setting is changed to AUTHORISED the invoice will be automatically authorised and pending sync will be created for it to sync with Xero/Quickbooks

Payment Account

DEAR is capturing payments made against orders in Shopify and is able to automatically add payments to created sale tasks (only in No Consolidation mode). If you want Dear to create these payments you need to choose an Account from chart of accounts which has an ability to receive payments to be used in created DEAR payments. If this account is not selected, payments won't be created.

Update stock level in Shopify

You may choose to disable automatic stock level update in Shopify DEAR does when available product quantity changes. This may be useful if you are managing stock level in Shopify manually and don't want DEAR to change it.

Disconnecting from Shopify Store

When you disconnect from Shopify store, DEAR removes all associations between DEAR objects and Shopify, including Log and Product Catalogue.

Automatic Notification Events

When you connect DEAR to your Shopify store DEAR attaches special listeners to be notified when important events happening in Shopify. These events are:

- Shopify Order is created
- Shopify Order is fulfilled

- Shopify Order is paid
- Shopify Order is cancelled
- Shopify Order is deleted

Depending on your order capture setting DEAR captures Shopify Order and saves it as pending order when Order is created, fulfilled or paid.

If Payment Account is specified DEAR also captures payment transaction associated with captured order (either already processed or still in pending orders) when Shopify Order is partially or fully paid.

When Shopify order is cancelled or deleted Dear automatically find and voids corresponding sale task if created or just removes associated pending order if not yet processed.

Sometimes it takes up to 10 minutes for the order to be picked up by DEAR because Shopify may send notifications with some delay.

Downloading Carriers

After you connected your Shopify Store to DEAR, DEAR automatically downloads active carriers from Shopify to be used for Shipment/Fulfilment.

Downloading Products

On DEAR Shopify Catalogue page there is a button starting download of products from Shopify to DEAR. In Shopify, each product has at least one variant. Each variant can have up to 3 options, distinguishing it from other variants of the same product (like size and colour). This concept is a perfect match for DEAR Product Families. When downloading products from Shopify, DEAR checks if product in Shopify has variants with options, or it is just one product, one variant without options.

If Product has options in Shopify, DEAR creates Product family and then all variants of that family are created as products in DEAR belonging to that family. If family and products already created/linked with Shopify then Dear updates existing family/products instead of creating new ones.

In Shopify variant sku is not unique field whereas in DEAR it is. To resolve the conflict Dear processes first variant with duplicated sku and skips the rest, showing warning message about skipped skus at the end of download process.

When product created/updated in Dear during download process, there is a link established between product and variant unique Shopify id and Dear unique product ID. This link is used later on when products are matched against sale order lines in Shopify and when subsequent product download happens to update the same products as the first time.

When downloading products Dear tries to search matching existing product first to avoid creating duplicates. This search is done in several steps:

1. First it tries to search product family by Name using Shopify product title.
2. Then for each variant it searches Dear product by Shopify variant id
3. If not found it searches Dear product by Shopify variant sku

Dear product name is combined from Shopify Product title + Variant Option 1 Value + Variant Option 2 Value + Variant Option 3 Value. Variant options are only included in the name if they are defined for the Shopify Product.

Shopify variant SKU is used as Dear product sku if it is defined. If not then first characters from combined product name are used as sku for Dear product instead.

During product loading Dear automatically creates product categories for all product types products have in Shopify.

Property mapping between Dear product and Shopify Product + Variant:

DEAR	Shopify
SKU	Variant SKU if defined, otherwise first 50 characters from combination of (Product title + Variant Option 1 Value + Variant Option 2 Value + Variant Option 3 Value)
Name	Product title + Variant Option 1 Value + Variant Option 2 Value + Variant Option 3 Value
Category	Product Type
Description	HTML product description
Weight	Variant Grams / 1000
Option 1 Value	Variant Option 1 Value
Option 2 Value	Variant Option 2 Value
Option 3 Value	Variant Option 3 Value
Barcode	Variant barcode
Tags	First 256 characters of Product Tags
Price Tier 1 when creating product/link to Shopify variant. If link between Dear and Shopify product already established then Price tier saved in the link is updated	Price
Images (Only new downloaded when no match by filename is found). Existing images won't be deleted.	Images

Downloading Customers

You can find download customers button next to download products button.

This function downloads all customers from Shopify to Dear, Updating Dear customers if they are already created.

Normally you don't need to use this function except for test purposes because Dear automatically creates customers when processing sale orders (with No Consolidation option)

This function creates a customer in Dear with Contact, Billing and Business addresses captured from Shopify.

Downloading Orders & Payments

Orders are automatically downloaded when order changes status in Shopify (like paid). Normally you don't need to trigger manual order download, but if for some reason order was not captured by Dear or to load historical sales you can use manual order download option.

Any downloaded order is saved to Pending Orders. It is a temporary storage of all sales and payments in Dear.

Only orders matching selected capture option are accepted: with status created/fulfilled/paid.

If some order has an entry in Logs (was downloaded before) it will be skipped. This guarantees no duplicate sales will be created by DEAR.

While saving order, Dear captures customer information, billing and shipping addresses. All line items are captured together with quantities, prices and totals. Totals order discounts are applied as additional charge to the whole order, without distribution by lines to reduce the chance of discrepancy.

If "Use company as a customer" is ticked then Company name is used as the customer name when it is provided.

Shipping is also saved as additional charge for invoice. Special setting in Shopify Store controls if shopping price is defined including tax or excluding tax. This setting is visible on Dear Shopify Settings page and is captured when you connect Dear to Shopify Store.

For each line in Sale Dear tries to locate corresponding product by SKU. If no product found Dear tries to download sold product info from Shopify with the same logic as in Download Products function. After that Sale line is saved to pending orders with all data from Shopify: Tax, quantity and Total.

Last step in order download is to trigger update of stock levels in other Shopify stores and eCommerce channels (eBay and Magento) for all products saved to pending orders.

Processing of Pending Orders

Consolidation option setting controls how pending orders are processed: once a day or one an hour.

For Daily Consolidation all pending orders are aggregated to single sale task once a day. This single sale task will be created for a customer selected on configuration page. In this scenario customer, billing, shipping and payment information stored in pending orders ignored.

For No Consolidation option each sale from Shopify is converted to identical sale in Dear, keeping all customer, shipping, billing and payment information.

Processing can be customised by settings described above.

When doing processing, logic is identical to the one provided through DEAR UI. It implements Drop Shipping, Kitting and other important scenarios.

Dear Shopify Catalogue

Besides product downloading you can choose to manage your Shopify catalogue from Dear. With Dear Shopify Catalogue you can list/update Dear product on Shopify. The same data is being updated/pushed to Shopify as described in Product Downloading above. Please be aware that updating product from catalogue will update stock level in Shopify regardless of the related Quantity update setting status.

When listing product on Shopify you may choose which price tier to use for price in Shopify.

You can also remove product from Shopify from Dear Shopify Catalogue.

Bulk Listing

In addition to individual product management with catalogue you have an option to bulk list/update products in Shopify. Some of the products might fail to be listed on Shopify due to several possible reasons explained in the last section of this document.

Bulk listing uses the same logic as the catalogue listing.

Logs

Each captured Shopify order once saved to Pending Orders creates Log entry to track the link between Sale in Dear and in Shopify. It also allows to avoid creating duplicated orders when capturing the same order several times during manual order load.

With Log entry you are able to see which Sale task reflects particular Shopify sale.

You also have an option to delete Log entry manually. This will allow to reprocess already processed order again if required. Deleting log entry won't void or delete associated sale task.

Updating Fulfilment in Shopify

When Shipment is authorised in Dear with carrier specified Dear tries to create fulfilment in Shopify (if not already created) or update it with provided tracking number. This will only happen if No Consolidation option is selected.

Updating Stock level in Shopify

If enabled in settings whenever available quantity changes in Dear for a product listed on Shopify with Catalogue status "Linked", Dear tries to update current Shopify stock level for the product automatically. It keeps stock levels in sync with current Dear levels to avoid overselling. This means that once you received stock for listed products with Purchase, Dear automatically updates stock levels in Shopify and you don't need to worry about it.

You can also trigger update of stock levels for all listed products manually on Dear Shopify Catalogue page.

Why some products fail to be listed on Shopify

Sometimes when you try to List a product on Shopify (via catalogues or with bulk listing) it fails.

There are two well-known reasons for this:

- Your product family contains more than 100 products/variations. Shopify has a limit of 100 variations per product. First 100 variations will be successfully listed but all the rest will fail. The only way to resolve this is to restructure Dear Product family to have less than 100 variations. You might need to remove listed variations from Shopify first.
- Some of your products in a family have identical option values. Shopify requires that each variant in a product has unique set of 3 option values.