

**K E N S I U M**

## Frequently Asked Questions

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### **Acumatica - Shopify Connector**

Connector Version: 6.1

Supported Acumatica Version: 6.1

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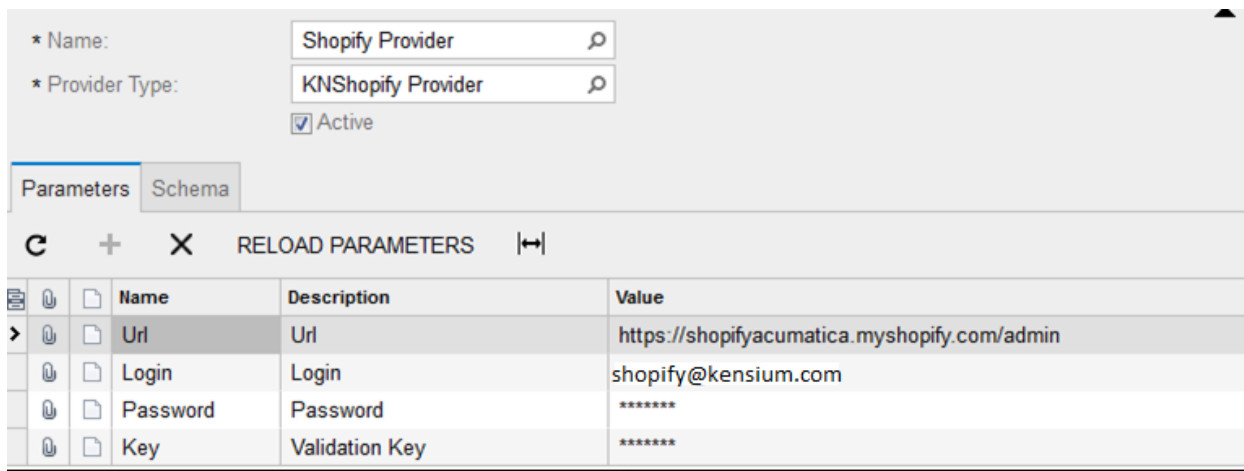
## LICENSING AND INSTALLATION

1. What type of licensing is required for the connector to work?

Licenses are required for both the Shopify Connector and Acumatica, with the connector license installed on top of the Acumatica license. Even demo versions of Acumatica require the Shopify Connector license.

2. Is there an Acumatica add-on that is required?

Yes, the Shopify Connector customization packages will be published. A data provider needs to be created in order to fetch data through Shopify API (see screenshot below):



3. Is the licensing model annual or perpetual?

Both annual and perpetual licenses for the connector are available. For those who choose the perpetual license, an annual maintenance fee equivalent to 18% of the annual license is charged each year.

4. What does the Annual Maintenance Contract (AMC) cover?

The AMC provides access to the latest versions of the software, which will be needed as Acumatica updates its technology.

5. How often are new versions of the connector released?

The connector product is typically not certified for every new version of Acumatica, but Kensium can obtain the certification upon customer requests.

6. How do renewals work?

On recurring/annual licenses, the customer is sent an invoice from Kensium/their partner. Upon receipt of the payment, the license is renewed for an additional year.

7. Do I need to subscribe to the AMC?



Without the AMC, customers using the perpetual license will not have access to support or the latest version of the software. Any support requests would be charged by the hour, and software updates would require subscribing to the AMC and paying for any previous years' payments, along with a 10% fee.

8. What is the cost of the connector?

The connector costs vary based on the type of installation. Please contact your sales representative for the pricing.

9. Is the connector sold directly to the customer by Kensium?

Kensium sells the connector directly to Acumatica customers, but it also sells the product to other Acumatica resellers. Sales made by other Acumatica Partners are carried out by the particular partner.

10. Is there a trial or development license available?

No, there are no trial or development licenses available.

11. How do I know that my license is about to expire?

Email notifications are sent to the email address that was used to register for the license 30, 7, 3, 2, and 1 day(s) before expiration. This "registered" email address can be changed by contacting your sales representative or the Kensium support team.

12. After the license expires, what would happen?

Upon expiration of the license, all Shopify Connector features are disabled, and you must request a new license key from Kensium in order to reactivate the connector's capabilities.

13. How can I renew an annual/recurring license?

You can accomplish this by contacting your sales representative or account executive.

14. If I send a license request for renewal one month before expiration, would the remaining one month of validity get added to the renewed license?

Yes, remaining time left on the previous license would be carried forward to your renewal.

15. Do I need to purchase another license if I create a new store in the existing website?

Yes, the connector license is based on your Shopify/ installation and the number of stores. If a new store is added to the Shopify/ installation, a new license is required for the additional store.



## SALES

1. How many implementations have you done?

This product just went to market, and Shopify Connector is being implemented for Jeffree Star Cosmetics, Fig and Yarrow, LA Vapor Clients etc. Connector is being implemented for Blade tech Client

2. How long does a connector implementation take?

A typical implementation can take 40 development hours spread across 3-4 weeks. A more accurate estimate can be provided after a discovery session in which we discuss your customizations and specific requirements.

3. Who does the actual implementation?

The Shopify Connector installation and implementation are carried out by Kensium's team.

4. Who provides support if I need it?

Kensium provides 24x7x365 support for connector services.

## TECHNICAL

### Setup Related Questions

1. Is there a middleware component involved?

No, there isn't any middleware involved.

2. What additional components do I need on Shopify or Acumatica?

On Acumatica, you need to install a customization package that provides the ability to sync entities from Shopify / to Acumatica (and vice versa).

3. How are images and videos managed?

The connector doesn't support the sync of images or videos.

4. What Shopify API calls does Acumatica use?

Acumatica uses API calls related to customers, products, and orders.

### Supported Functionality Related Questions



1. Do you support matrix inventory items?

Yes, the Shopify Connector supports matrix inventory items. However, this is setup one-way from Shopify to Acumatica

2. Do you support multiple stores / websites?

Yes, we do.

3. Can this tool be used for migrating data from existing Shopify sites into Acumatica?

We do not recommend using this tool to migrate large volumes of data via API calls. We advise using export/import scenarios for one-time data import. Kensium provides this support on a separate contract.

4. How do you handle gift cards?

If the payment is done via gift card, connector creates this payment method as cash as of today.

5. How do you handle reward points?

Currently our connector does not support reward points functionality.

6. How are discounts handled?

Because Acumatica natively does not recognize Shopify discounts and promotions, the connector passes these price reductions through the system as "manual" discounts at the item level. Shopify cart-level discounts are distributed across the sales order line items proportionally.

Additionally, Shopify line level discounts are imported to Acumatica against the specific line items.

7. Can you handle authorizations in Shopify and capture in Acumatica?

Both authorization and capture happen in Shopify.

8. Are partial shipments supported?

Yes, partial shipments are supported and synced to Shopify. When the items are not available on Acumatica, then the order will be placed as back ordered in Acumatica and connector will sync shipping details of items that are available and updates the shipping tracking number.

Once a receipt is raised against unavailable items, order will be synced back again via connector and the second shipment tracking number is updated on Shopify along with the items that are shipped from backorders.

9. Are Acumatica Kits handled by the connector?

No, the connector does not handle Acumatica Kits.



10. Does the connector support drop shipping?

No, the connector does not support drop shipping.

11. Does the connector handle Shopify custom options?

Yes, options are attributes within Acumatica.

## How and What?

1. What data is synced between Shopify and Acumatica?

Products, Customers, Orders, Attributes (Customer and Product), Categories, and Shipments are all synced.

2. Will data get synced automatically after the Shopify Connector is installed and configured?

Data synchronization can be performed only after setting up the automatic sync schedules.

3. Between Shopify and Acumatica, which one is the system of record?

The connector allows the data to be synced bi-directionally. However, in an ideal situation, the parameters below are followed.

- Customer data can be synced bi-directionally
- Product data should be flowing from Shopify to Acumatica
- Inventory sync is done from Acumatica to Shopify
- Orders are placed. Payment is authorized and captured in Shopify and synced to Acumatica
- Shipment details are synced from Shopify to Acumatica

4. Is the logging saved in Shopify or is it external?

On Acumatica we have logs that provide details of each action performed by the connector.

5. Do the syncs happen in real time?

No, real-time syncs are not supported by the current version of the connector.

6. What data is synced back to Shopify from Acumatica upon fulfillment of an order?

When an order is fulfilled, a shipment label is created in Acumatica. The connector creates a shipment in Shopify/ and updates it with the shipment number, shipment type, shipment date, quantity, line items, and tracking number.

7. Is an order required for a customer to be synced?





No, Shopify allows a customer record to be created even if they only set up a new account. Customer data is synced to Acumatica via the customer sync process, which is not reliant on orders.

8. How often can I run the syncs?

Because each sync only pushes/pulls outstanding changes from the previous sync, the recommended frequency depends on the throughput of your operations. We establish times for your automated syncs after we learn more about your business and goals during the discovery process.

9. Is the order number the same between Acumatica and Shopify?

The Shopify order number is maintained in Acumatica on the customer order number field.

10. What is the unique identifier for customers?

The customer's Email ID is a unique key for customers on Shopify. But verification of customer uniqueness is done by Shopify customer id generated on the URL for each customer

11. Is inventory managed in Shopify?

Yes, Shopify maintains its own inventory for products, which is decremented when an order is created. However, Product/inventory syncs replace data in the site with the latest inventory data from Acumatica.

12. What happens on the Shopify front end if the two systems cannot reach each other?

Shopify continues to sell the inventory from the latest sync, but will not be updated with incoming inventory from Acumatica until the systems can communicate again.

13. How do taxes work between Acumatica and Shopify?

Tax rates can be configured using built-in tax tables in Shopify and Acumatica, or a tax service can be used. Taxes calculated in Shopify can be passed to Acumatica on the sales order, so Acumatica doesn't recalculate the tax once the order is synced. Acumatica can recalculate taxes if the sales order is changed.

14. How are Shopify transactions in different currencies handled?

The base currency, configured in Shopify, is the transaction value that is pushed to Acumatica. Any currency conversions/exchanges are made after the transaction reaches Acumatica.

15. Can you activate products in bulk?

Yes, you can activate several products at once through import scenarios in Acumatica.

16. Can I sync a specific item?



Yes, support exists for an admin user in Acumatica to sync a specific Product, Category, Customer, or Order.

17. How do APIs in Shopify work, and how do they differ to Acumatica?

The Shopify framework provides integrators and developers with a way to create products and add-ons that allow Shopify to communicate with other platforms, such as Acumatica.

Difference:

Within Acumatica the actions performed on the screen can be converted to API's, while Shopify/ has its own framework and using Shopify/ API's the data is returned from respective websites i.e. we use Shopify/ APIS to fetch the data and import to Acumatica.

18. What are some of the reasons for an order to not sync from Shopify into Acumatica?

There are several scenarios that can result in a failed synchronization of an order to Acumatica. Some are:

- Order shipping method or carrier is not configured in Acumatica
- Order payment method is not configured in Acumatica or Shopify
- Item is not defined in Acumatica
- Sales order sequence number error
- Unsupported product types
- Credit limit for customer is preventing the order creation in Acumatica
- Infrastructure issues, such as lack of disc space on either the Acumatica or Shopify
- Network connection issues

19. Can I re-sync failed orders individually?

Yes, orders failed via automatic schedules are displayed on manual processing screen and one can select the required order and run manual sync

20. How are order edits managed?

Once payment is done, Shopify supports editing of billing and shipping address only.

21. How are RMAs handled?

RMAs are not currently supported by the Shopify Connector.

22. How is refunding handled?

Once the items on Shopify are refunded, one has to manually sync these orders to Acumatica. For this, we developed a separate processing screen to import only refunded orders. Once the orders are imported, this order with line items that are refunded are created as order type 'RC'

Note: Connector support sync of only imported and non-fulfilled orders as part of refunds.

23. How does the connector handle multiple units of measure (UOMs) defined on the same stock item in Acumatica?



Shopify does not support multiple UOMs.

24. When syncing orders, are customers automatically synced?

In some cases, such as a new customer, yes.

When an order is imported from Shopify to Acumatica, the system checks to see if the customer's Email ID already exists in Acumatica. If it is not found, the customer is created and the order is then synced.

If the customer already exists, the customer data is not updated, but the customer information on the order is populated with the information from Shopify. This is because both Shopify and Acumatica allow customer information on a sales order to be different than the customer's default information.

However, if the customer logs into Shopify and updates their default billing or shipping address, Acumatica is updated on the next scheduled sync.

25. Will order-level billing and shipping information be saved to the customer record?

No, this information will be synced to the order only. The customer must change their default information for it to be synced throughout the system.

26. Does the connector create invoices in Shopify?

Invoice generation is not currently supported by the Shopify Connector.

27. Can the connector handle split shipments (multiple delivery addresses)?

No, orders cannot be split by the customer on the Shopify front end (meaning they cannot be synced by the connector). Realistically, the order could still be split using just Acumatica, but restrictions on Shopify make this impossible without the customer contacting you directly to manually place an order.

28. How does the connector handle freight charges between Shopify and Acumatica?

Out of the box, Acumatica will recalculate freight costs when the sales order is passed to Acumatica from Shopify. Since this may result in conflicting totals from the two platforms, the connector setup includes an option to ignore the Acumatica-calculated value. With this option, the Shopify value is referenced throughout the system.

29. Are newsletter subscribers in Shopify synced into Acumatica?

No, newsletter subscribers are not synced by the connector at this time.

30. How markdowns are handled?

All markdowns – permanent and temporary – are handled as regular price changes in Acumatica.

