Dynamics 365

Business Central

How to Guide: Storefront Admin, Catalogue Management & Order Processing.

braintree

Business without borders

A VOX Company

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1 Introduction

STOREFRONT
by Braintree

Welcome to Storefront, powered by Microsoft Dynamics 365 Business Central!

Storefront is a rapid start ecommerce business management platform. Set up your Products, Prices & Content in no time. Start selling online fast.

The following document outlines how to set up and use Storefront & Storefront Admin.

2 Get Started

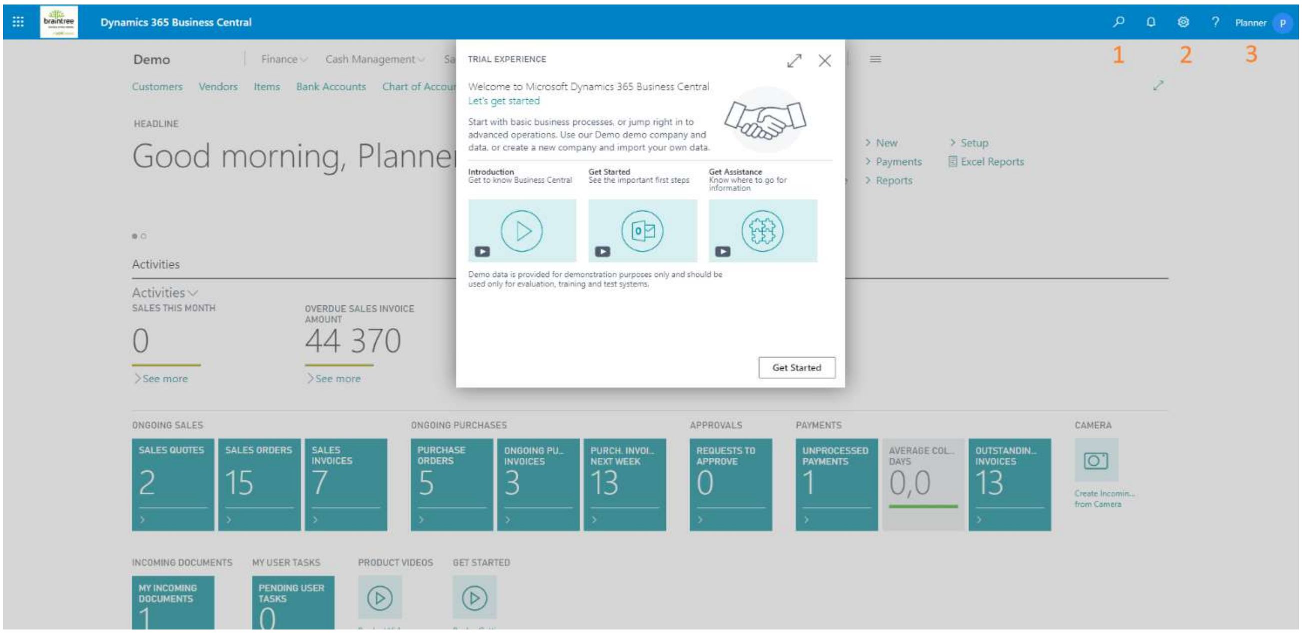
2.1 Admin Login

Sign into Storefront Admin at https://businesscentral.dynamics.com/ with your on Microsoft account:

MY-STORE@ONMICROSOFT.COM

Once signed in, your Role Center landing page opens with information and tasks related to your user profile role.

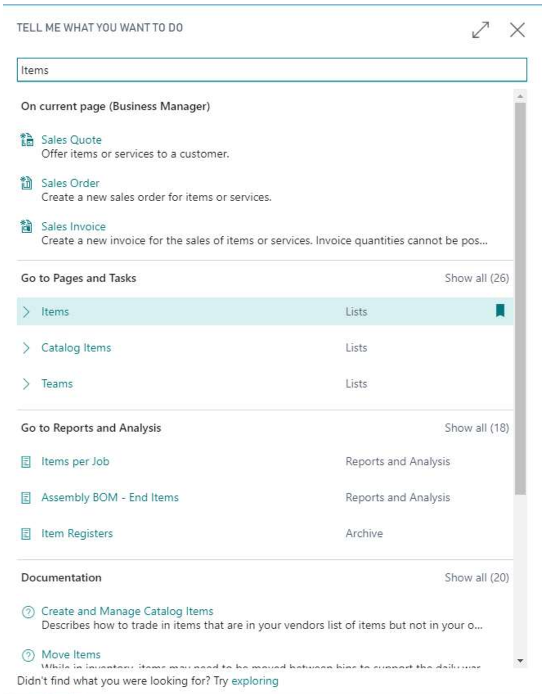
From here you can navigate to any task by using the Search function: 



1. Search
2. My Settings
3. Microsoft Account

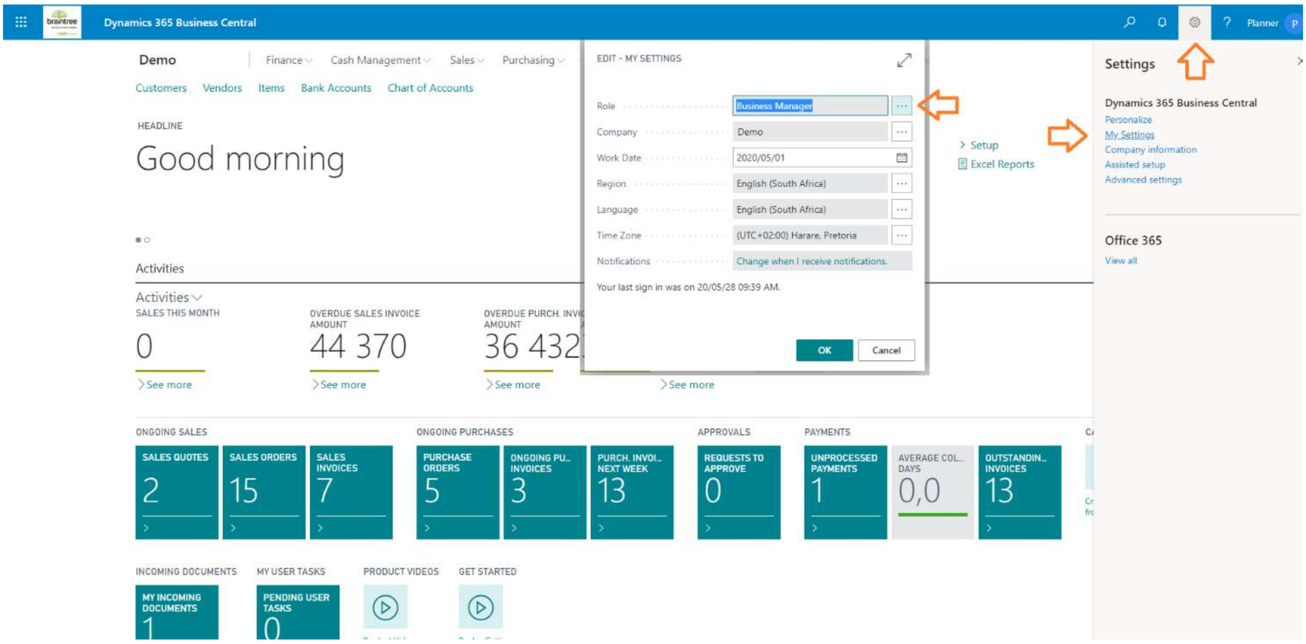
2.2 Search

Search for information & tasks such as Items, Customers, Sales Orders & Sales Invoices. Click to open.



2.3 My Settings

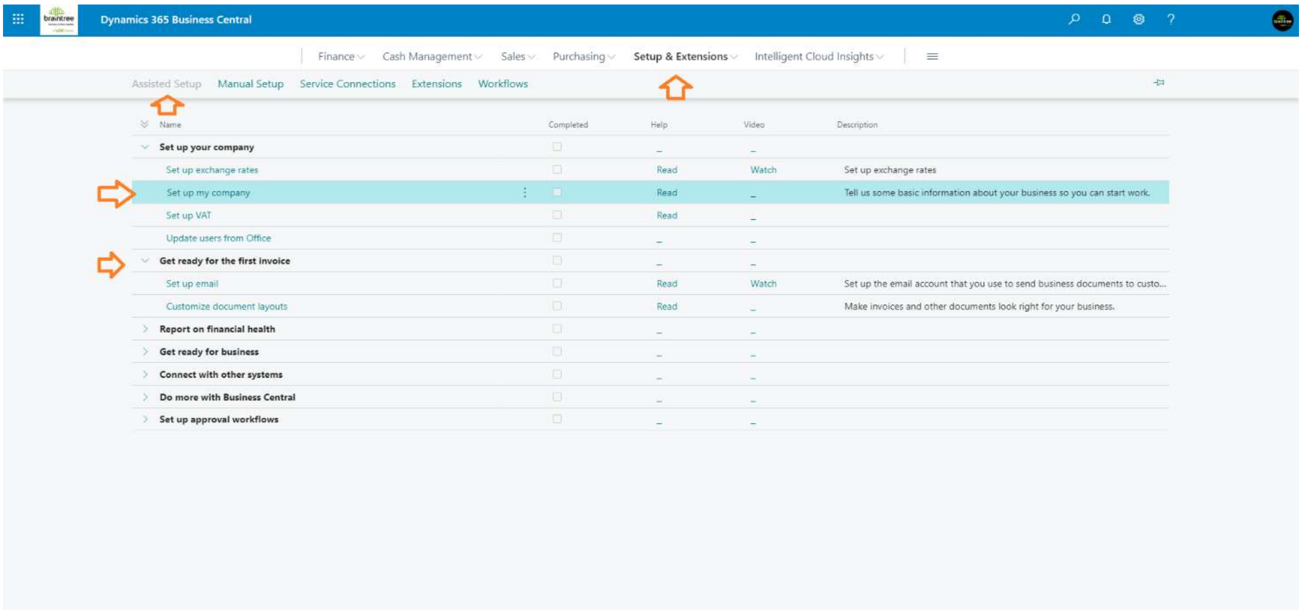
Change your user profile's Role. Start by using the BUSINESS MANAGER or SALES ORDER PROCESSING Role.



2.4 Assisted Setup

Assumes Business Manager Role

Set up your company information, including address, contact info & logos: Set up my company:



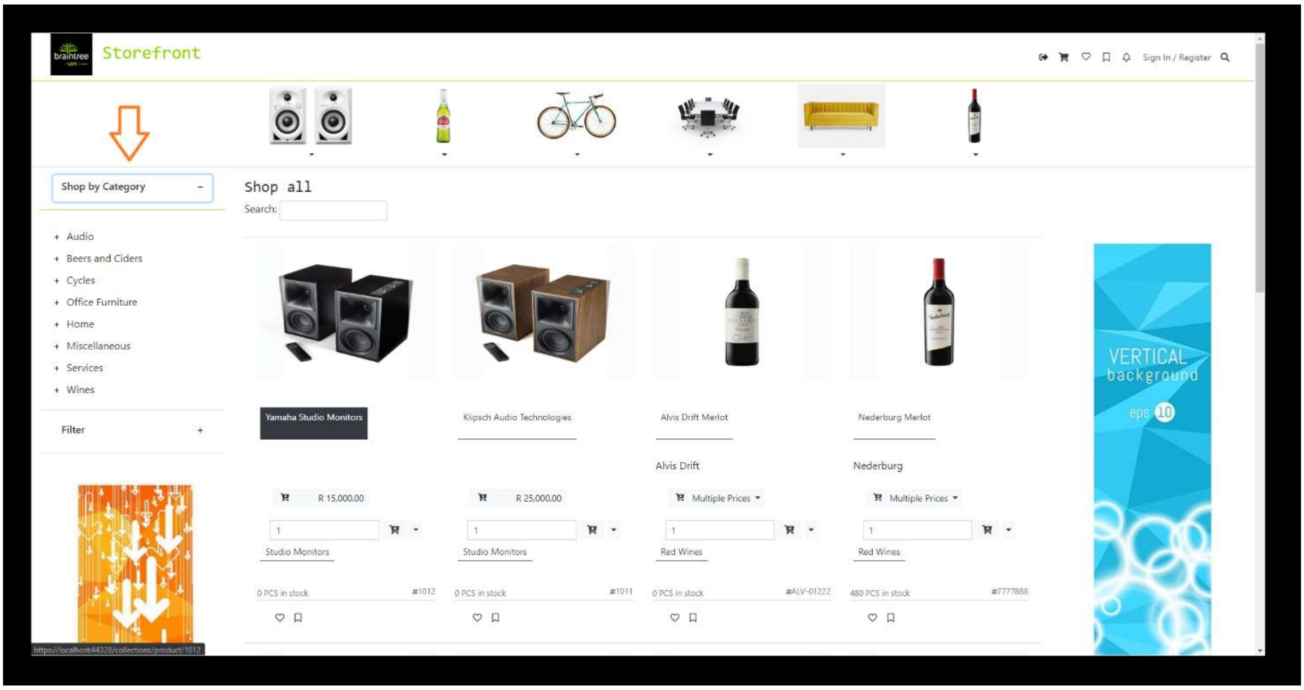
Also consider setting up email and tailoring document layout under Get ready for the first invoice. You can always come back to this step.

3 Departments & Categories

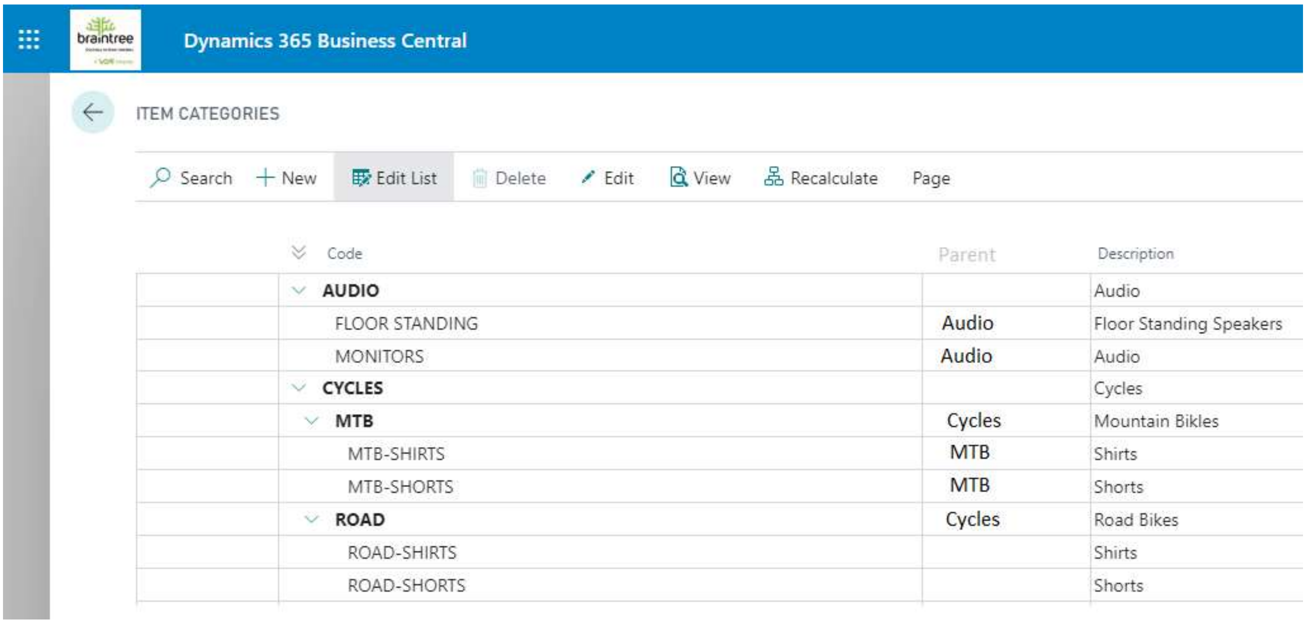
Assumes Business Manager Role

Create Item Categories to represent your ecommerce categories or departments. Multi-level categorisation is supported, parent / child classifications. Categories are allocated to products. Once categorised, products are listed under categories.

Ecommerce categories:

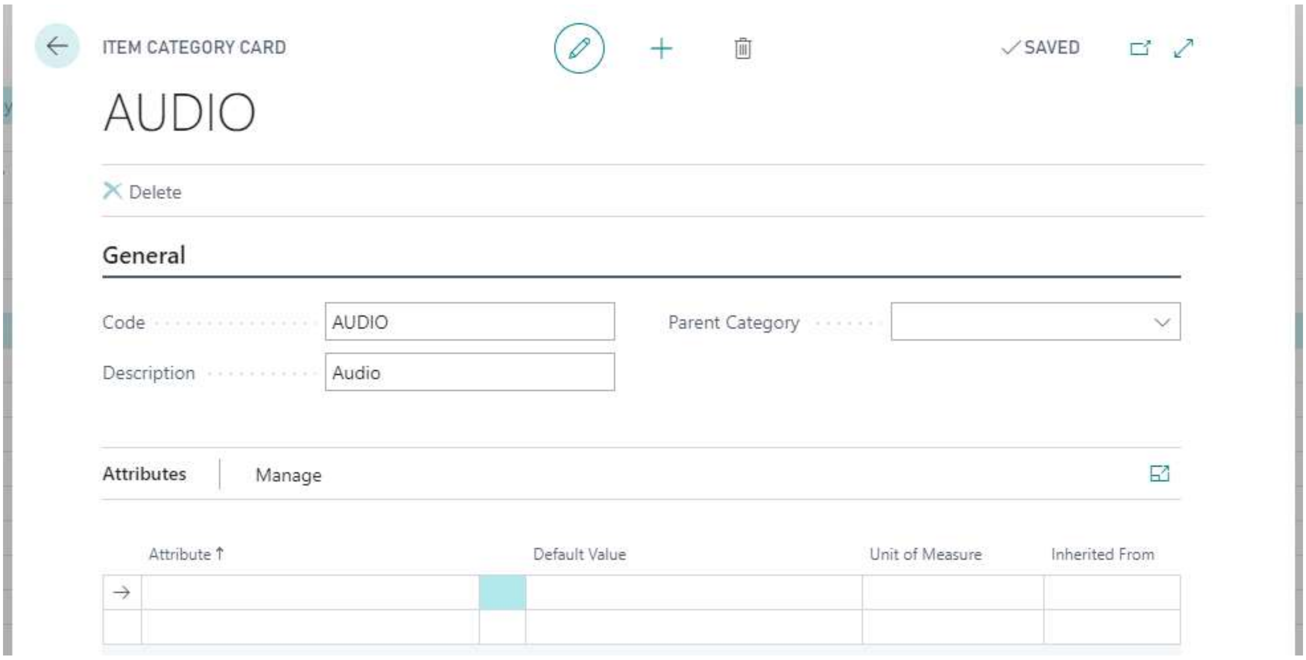


Search & navigate to Item Categories:

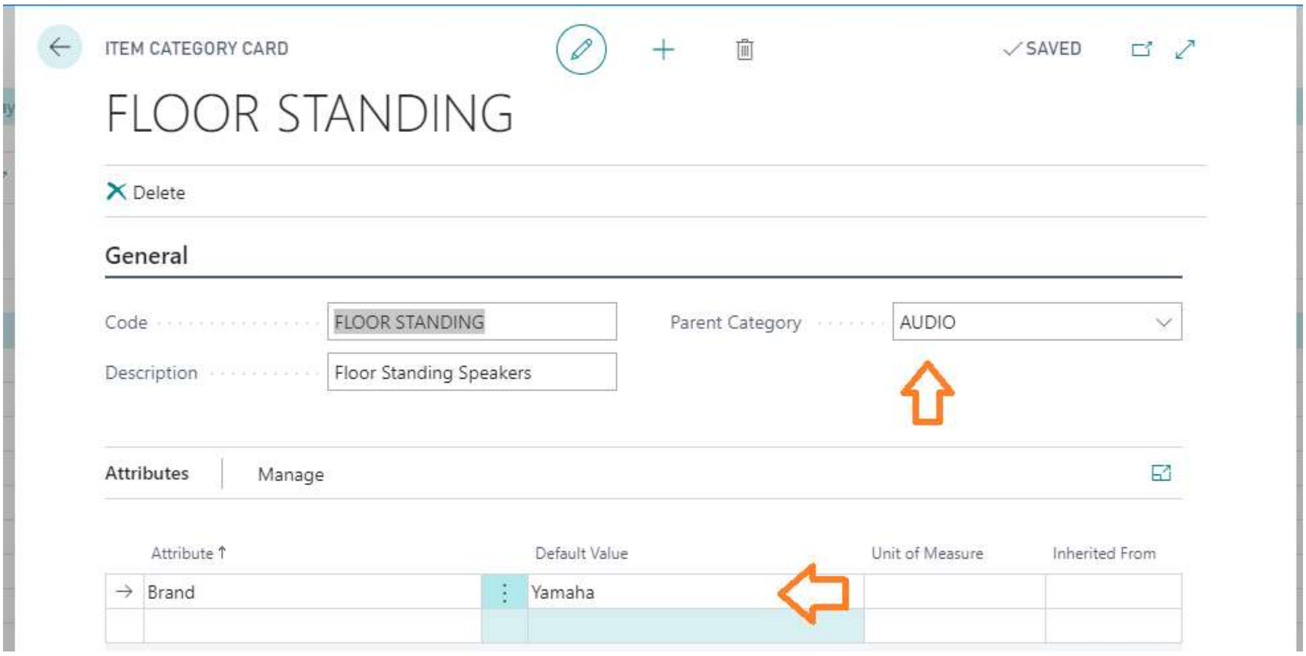


3.1 Create a new Category

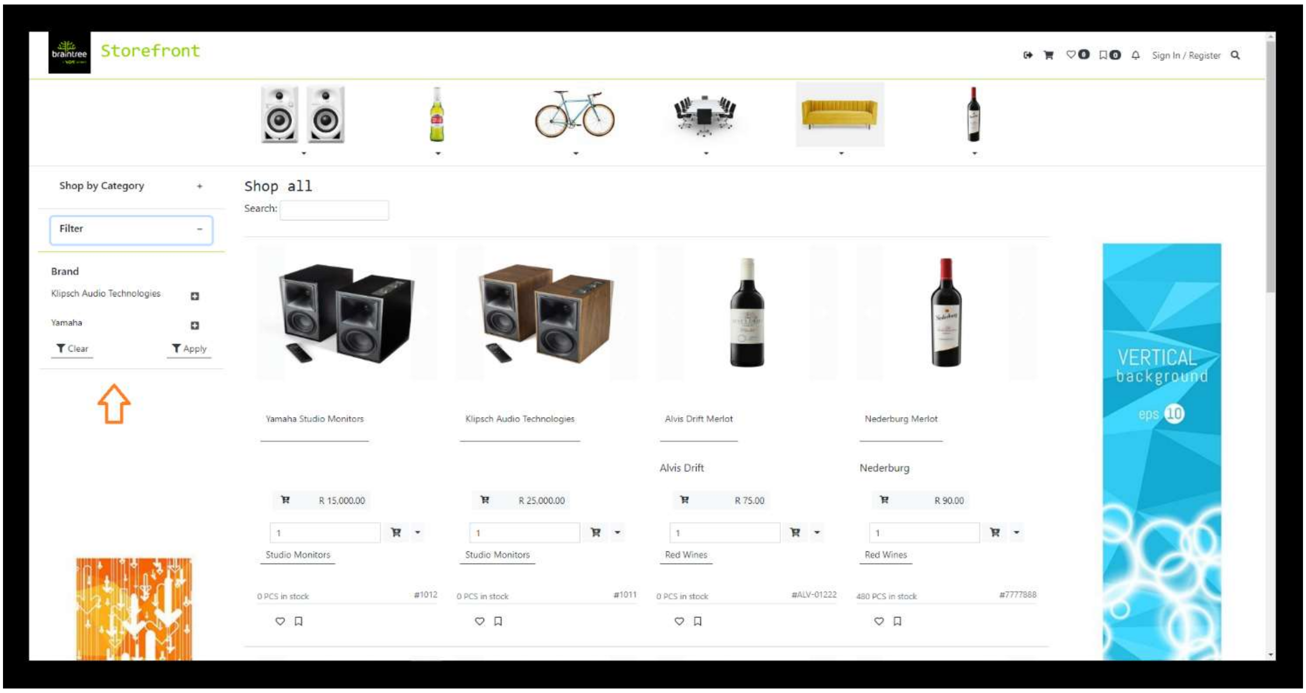
Select New to create a new department or top line category: AUDIO



Now create Floor Standing Speakers as a child category for AUDIO.
We will also apply Attributes to it, Brand Yamaha. Attributes are any product category characteristics which your customers may want to search for, such as height and model year:

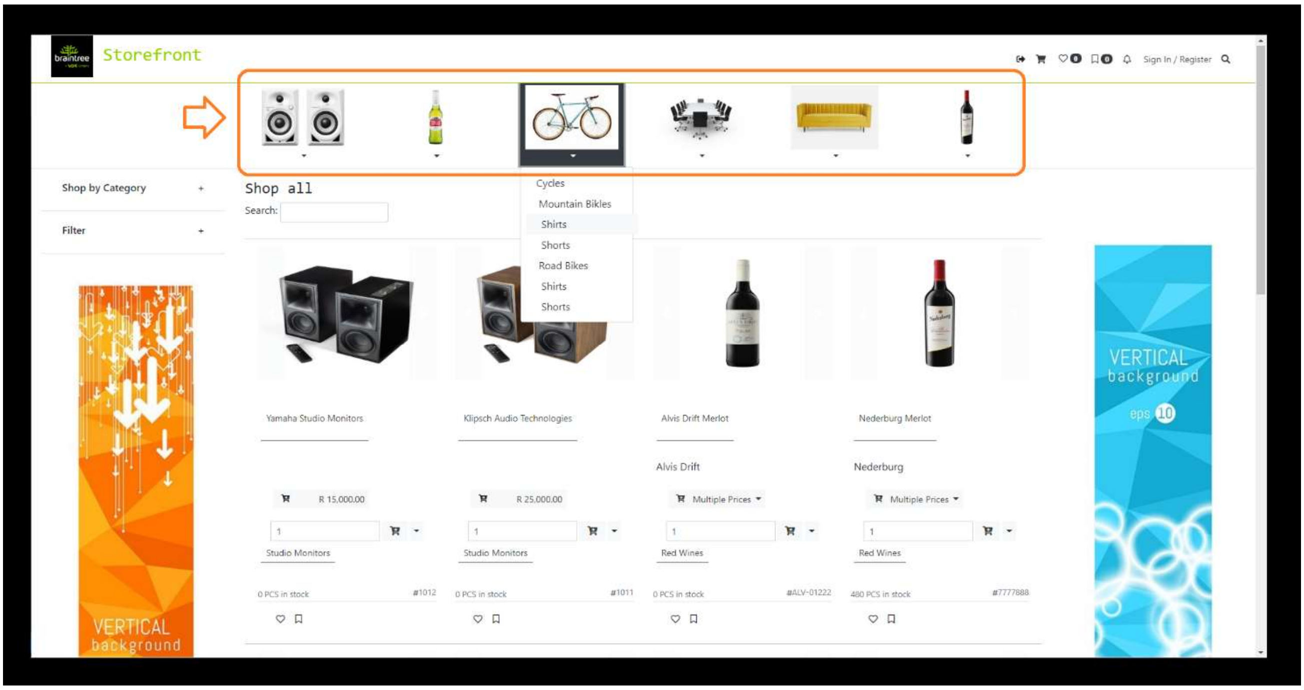


Ecommerce Brand attribute filters:



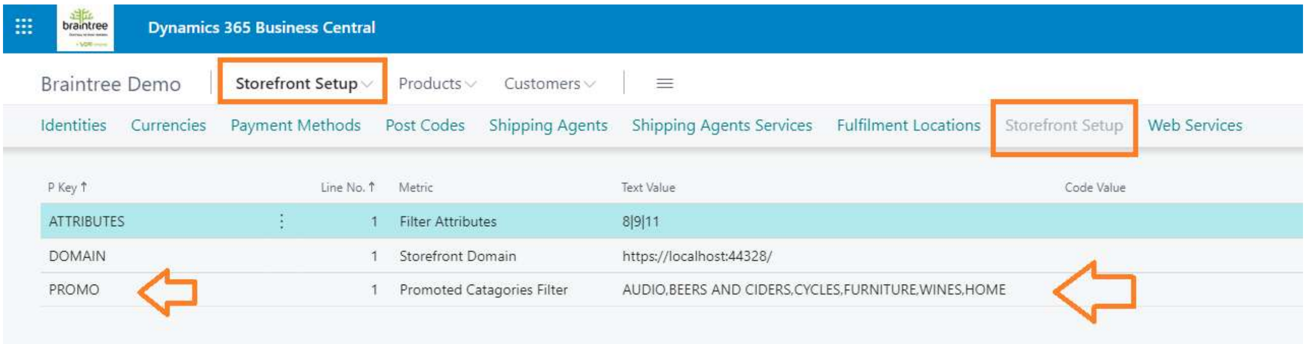
3.2 Promote a Category

Promoted categories are displayed in the promoted menu bar, just below the Ecommerce menu bar:



Change your role to Storefront

Select Storefront Setup, then Storefront Setup to edit promoted categories:

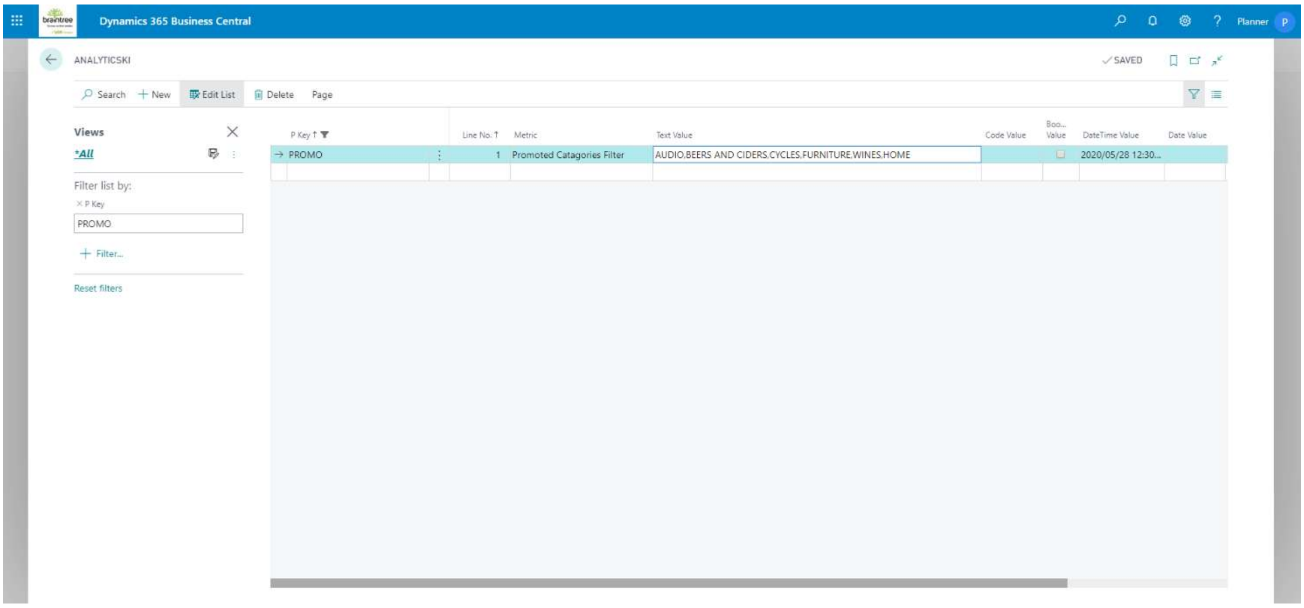


Create or edit the PROMO line to list promoted categories:

- Item Category Codes [as per the Item Categories list] should be used, separated by a comma
- No extra spacing or characters are allowed.
- Example:

P Key: PROMO

Text Value: AUDIO,CYCLES,FURNITURE,HOME AND GARDEN

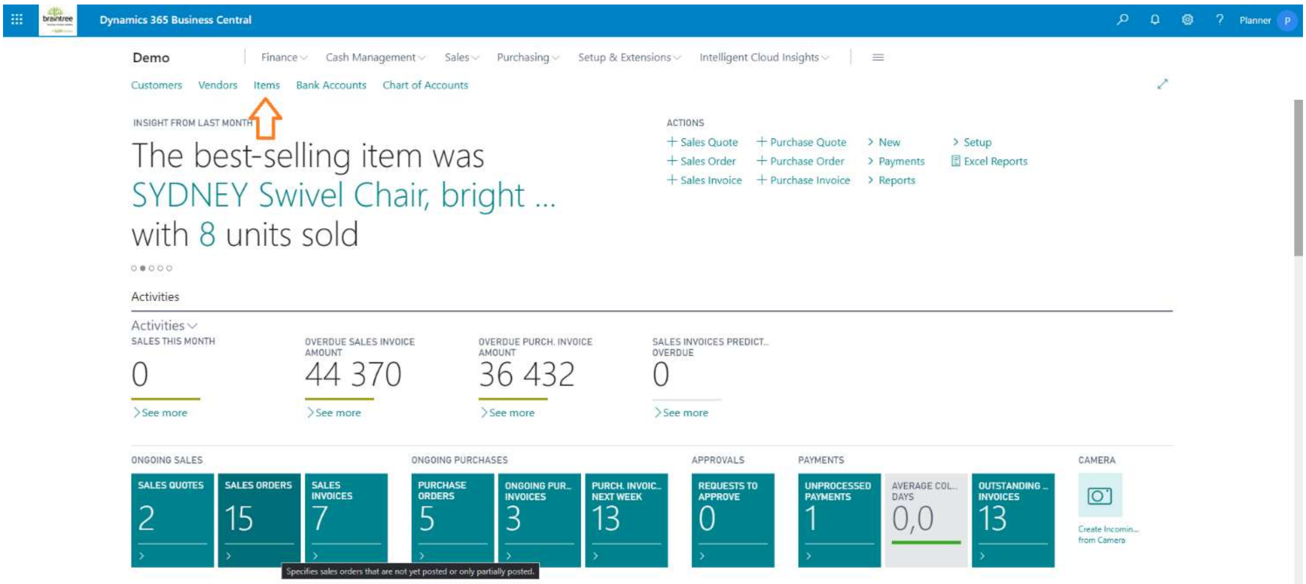

Dynamics 365 Business Central
ANALYTICSKI
SAVED
Search
New
Edit List
Delete
Page
Views
*All
Filter list by:
P Key
PROMO
Filter...
Reset filters
P Key
Line No.
Metric
Text Value
Code Value
Boo... Value
DateTime Value
Date Value
PROMO
1
Promoted Catagories Filter
AUDIO,BEERS AND CIDERS,CYCLES,FURNITURE,WINES,HOME
2020/05/28 12:30...

4 List a Product

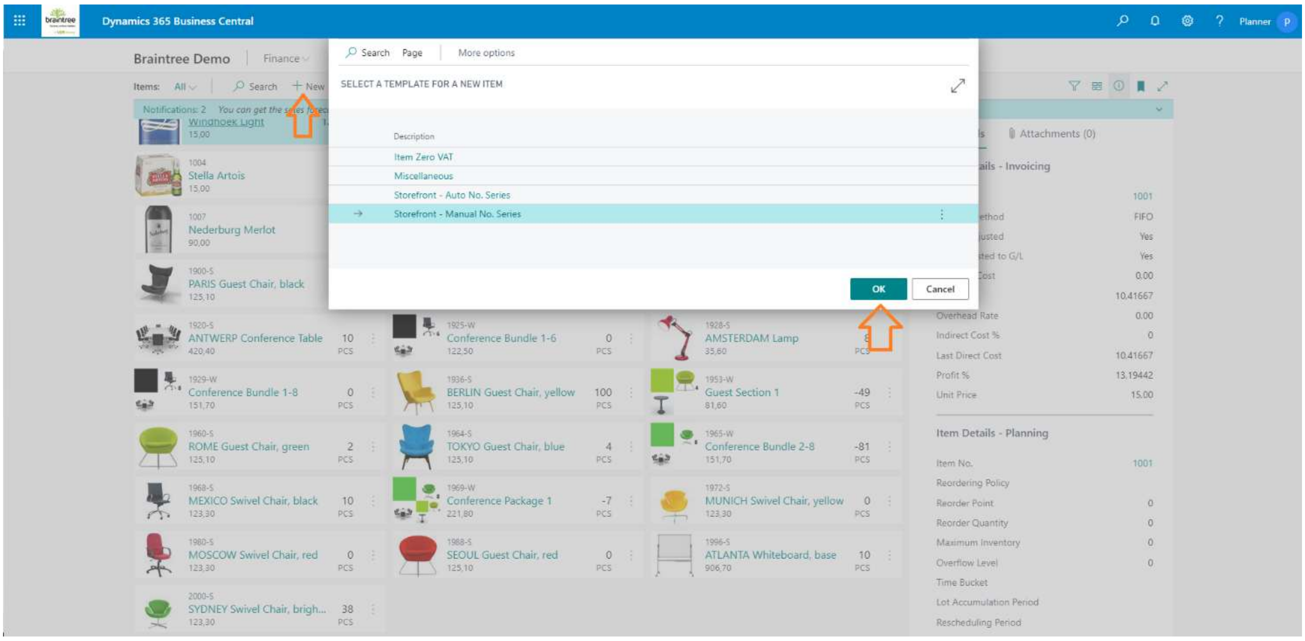
4.1 Create an Item

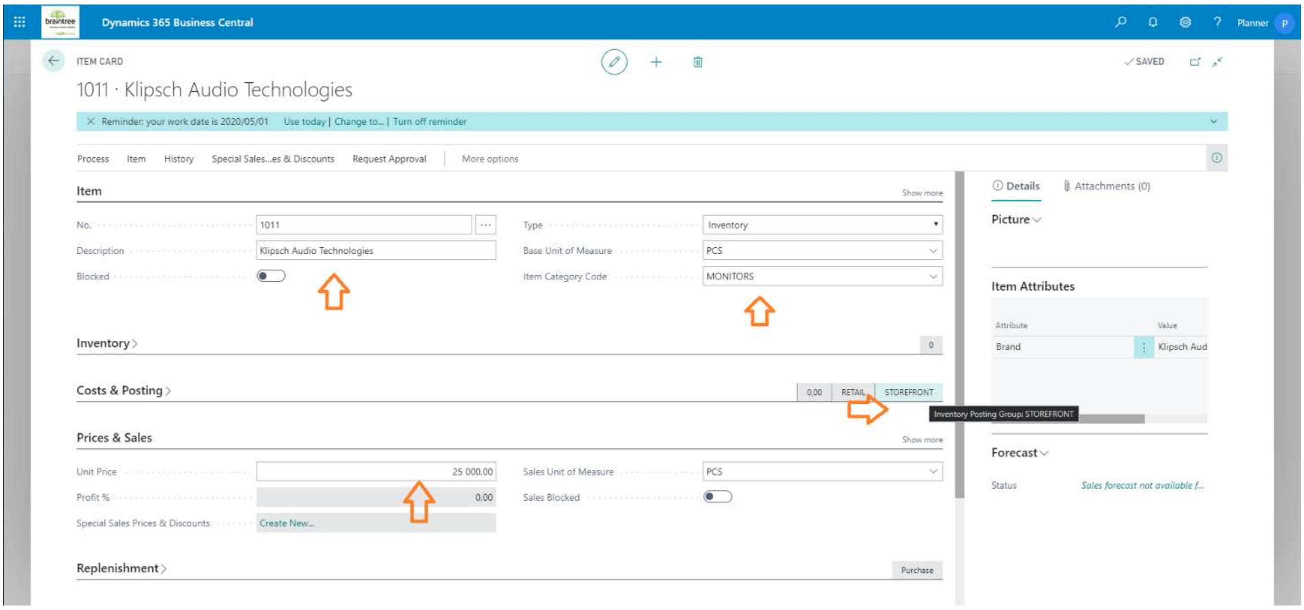
Assumes Business Manager Role

Create Items to represent your Ecommerce products. Search & navigate to Items:



Select New and then an appropriate template for your new product:





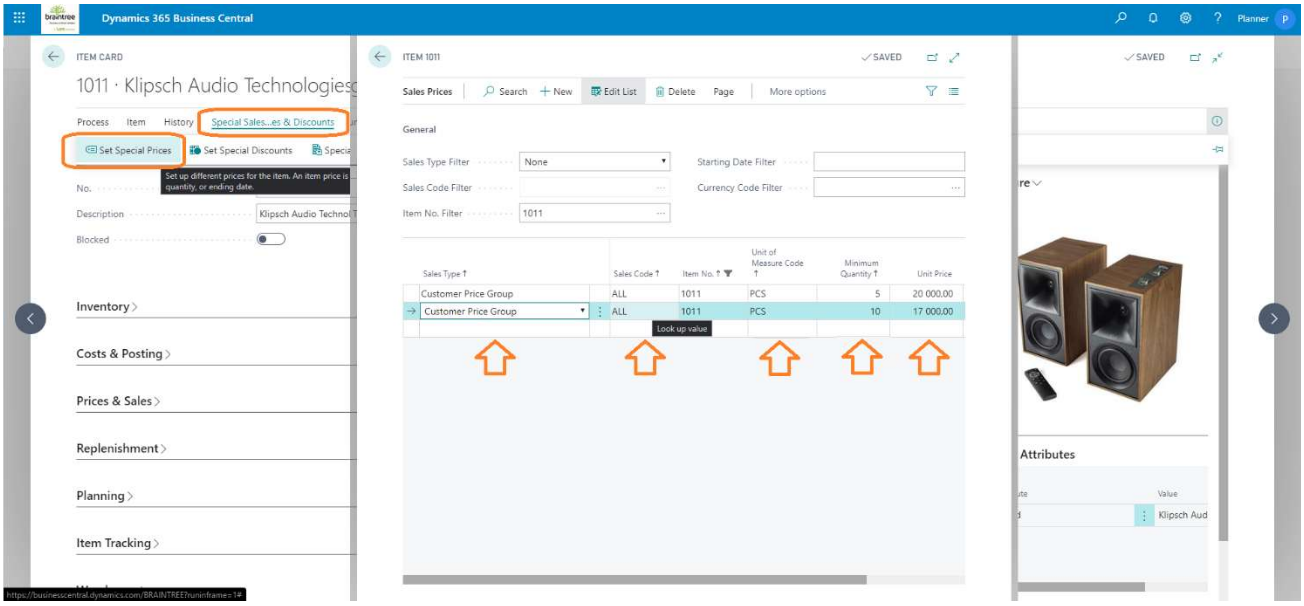
Make sure to specify:

- Description TIP: ECOMMERCE PRODUCT SEARCH IS POWERED BY THIS FIELD. INCLUDE TO MAKE THINGS EASIER TO FIND.
- Base Unit of Measure
- Item Category Code
- Inventory Posting Group: STOREFRONT
- Unit Price
- Picture is optional
-

4.2 Special Pricing

From the Item Card, select Special Sales Prices > Set Special Prices to specify special prices:

- Quantity breaks
- Different Units of Measure
- Date specific



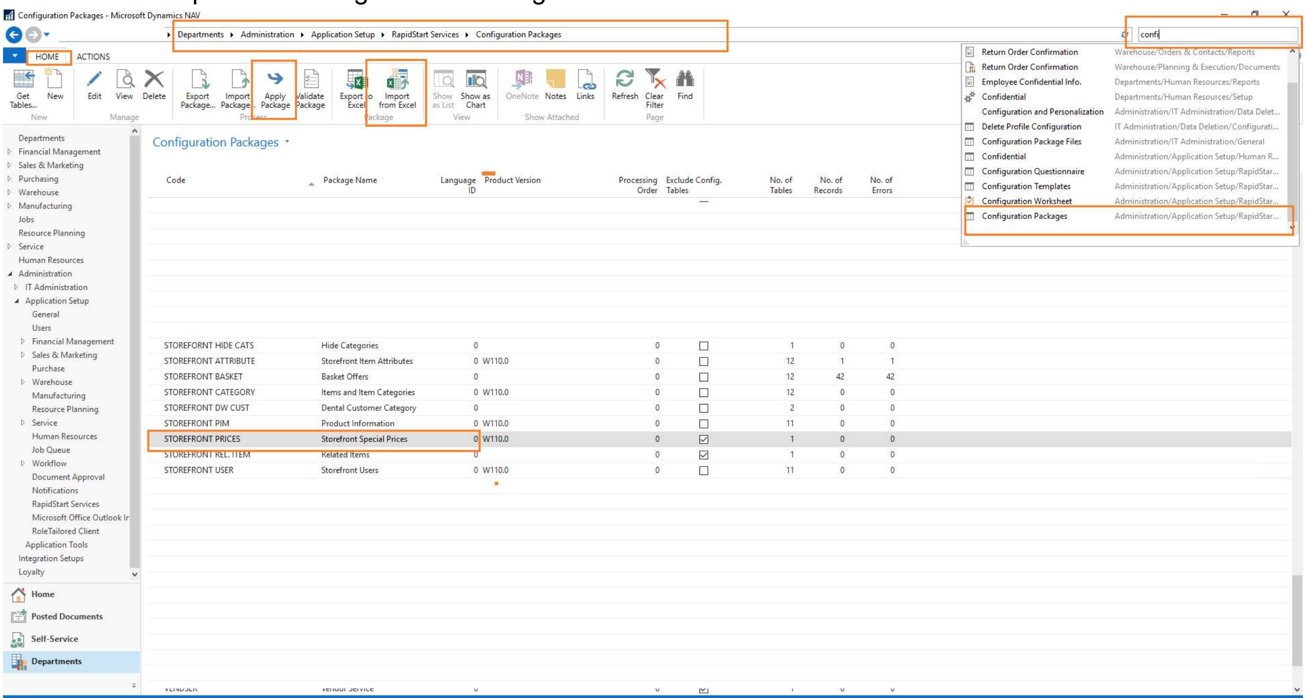
4.3 Delist a product

Block or Sales Block the Item Card to delist a product.

4.4 Bulk Creation

Bulk import Special Prices: Search & navigate to Configuration Packages:

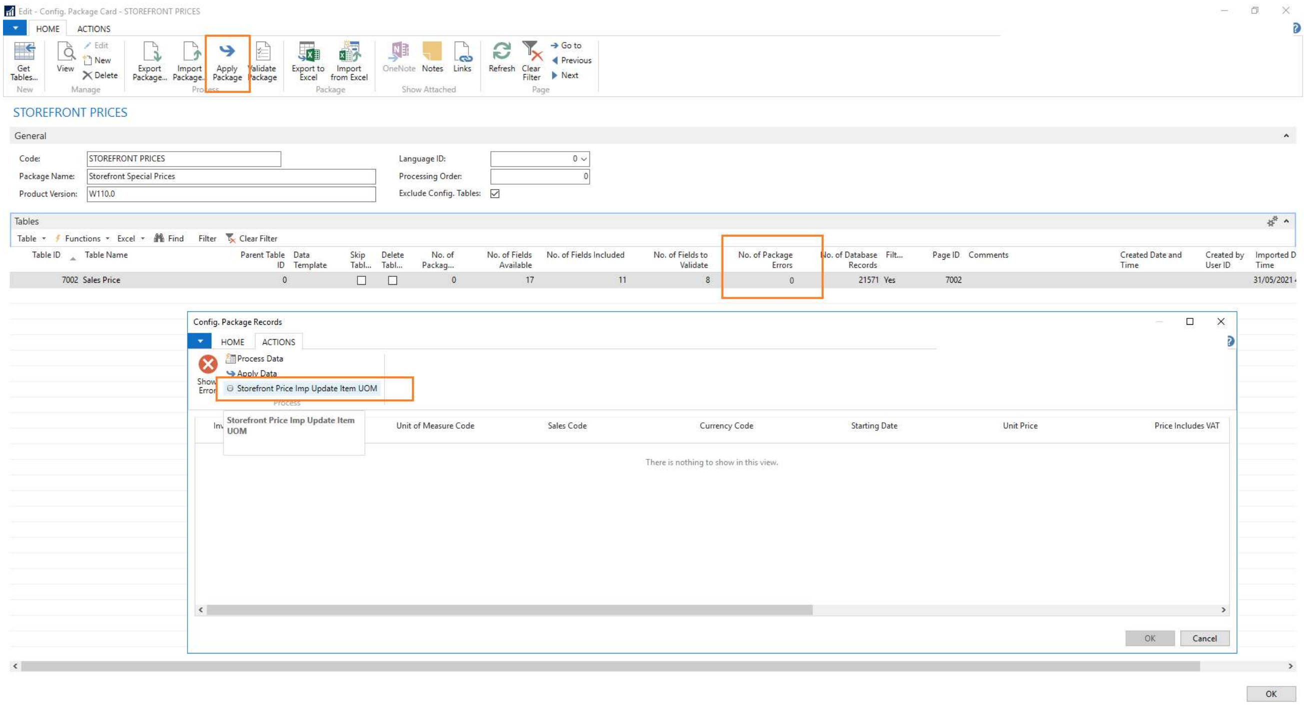
- Find RapidStart Configuration Package: **STOREFRONT PRICES**



- HOME (Navigation Bar) > Import from Excel > Select a new Price file.
- HOME (Navigation Bar) > Apply Package

- Open Card and check for import errors:

- HOME (Navigation Bar) > Edit
    - Config. Package Card:



- On the lines > Drilldown on No. of Package Errors, if any – normally related to incorrect units of measures.
- Select ACTIONS (Navigation Bar) > Storefornt Price Imp. Update Item UOM
- HOME (Navigation Bar) > Apply Package

Import File Format:

StorefrontSpecialPric
es Import Template.xl

To import, create & update products in bulk, contact us at braintree.support@voxtelecom.co.za.

4.5 Product Information Management

- Rapid Start Configuration Package: STOREFRONT REL. ITEM
  - STOREFRONT PIM
  - STOREFRONT PIM-SHORT
  - Don't specify a Line No for new entries.

4.6 Related Products / Variants

- Rapid Start Configuration Package: STOREFRONT REL. ITEM
  - Don't specify a Line No for new entries.
  - Metric: type of item relation: variant or related or alternative (Case sensitive)

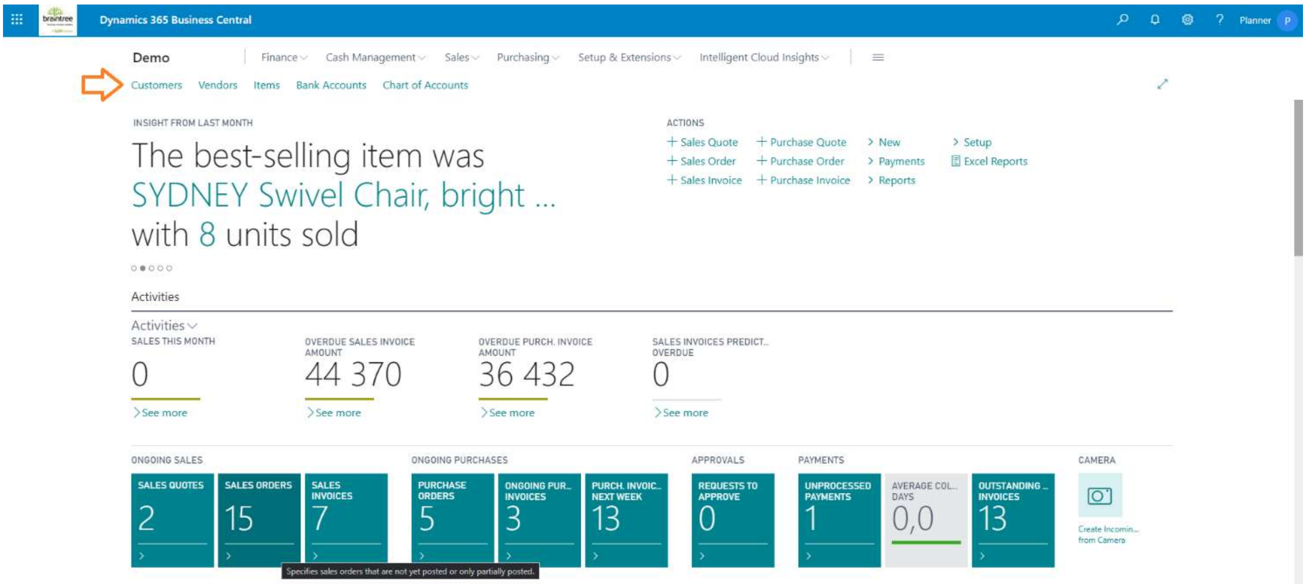
STOREFRONT REL. ITEM	AnalyticsKI	73502		
P Key	Line No.	Metric	Text Value	Code Value
Item123		variant	Item789 Description	Item789
Item456		related	Item789 Description	Item789
Item789		alternative	Item999 Description	Item999

5 Create a Customer

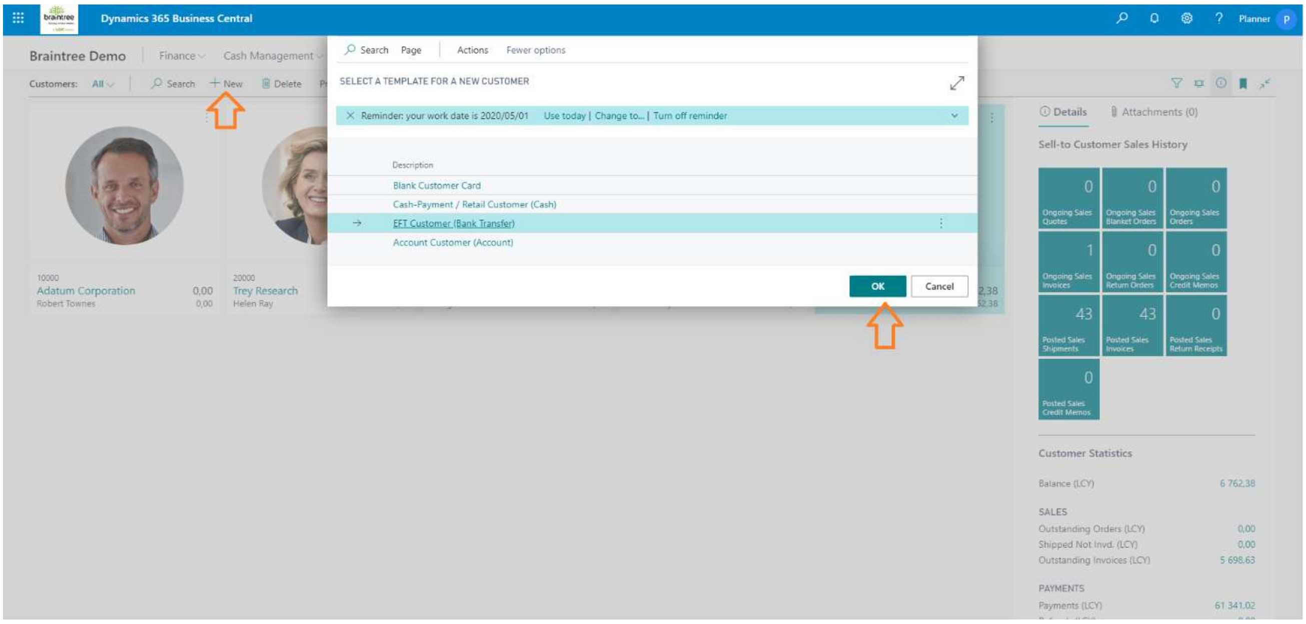
Assumes Business Manager Role

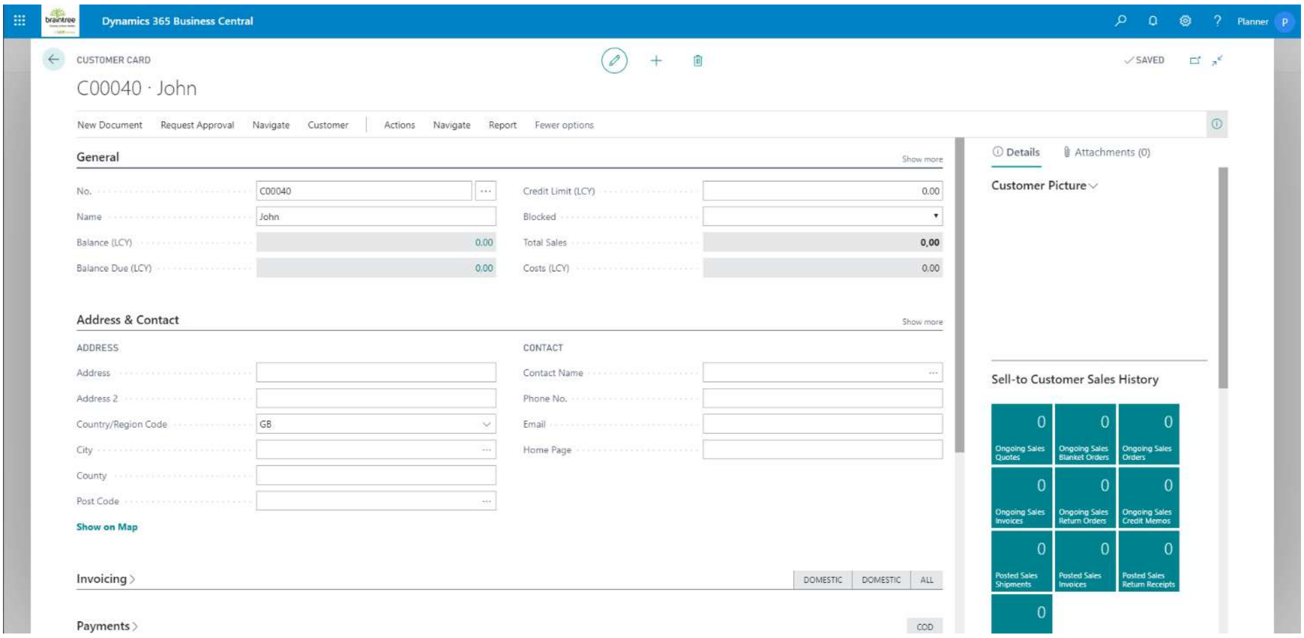
Create Customers to represent your Ecommerce customer accounts. Customers can also register online.

Search & navigate to Customers:



Select New and then an appropriate template for your new customer account:



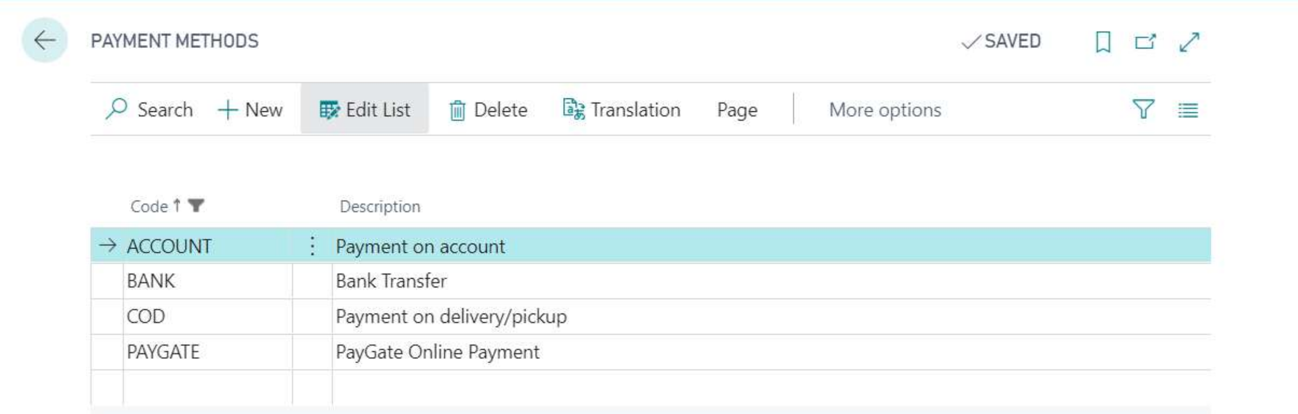


Make sure to specify:

- Name
- Credit Limit (LCY), set to zero for cash customers.
- Address & Contact information
- Payment Method
- Customer Price Group: ALL
- Set Blocked to All to prevent a customer from placing new orders.

5.1 Default Payment Methods

Search & navigate to Payment Methods:



These payment methods are preconfigured as available in the Shopping Cart. Delete a payment method to remove it as an available payment option.

To enable a new Payment Method workflow on Ecommerce, contact us at braintree.support@voxtelecom.co.za.

6 Create an Ecommerce Login Account

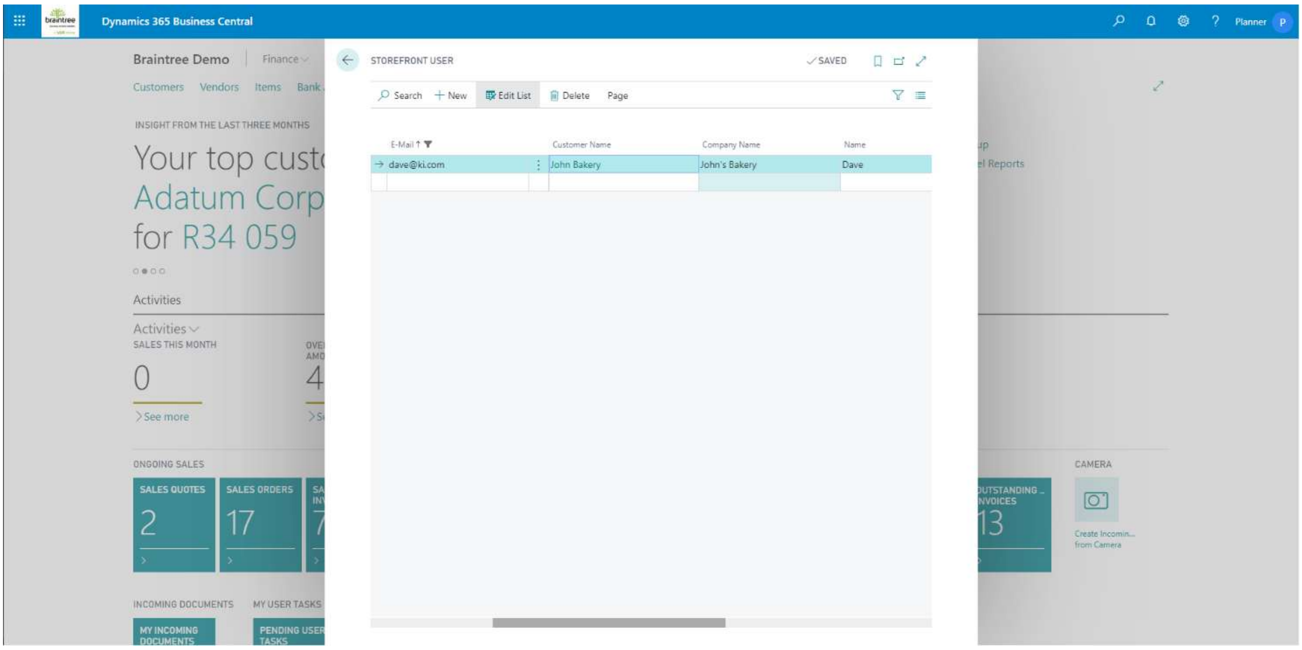
Assumes Business Manager Role

Create Storefront users to represent your Ecommerce login accounts. Customer accounts are linked to logins. Customers can also register online.

Register on the website.

Search & navigate to Storefront Users:

Select for new logins created, and allocated to an account, if required:



Make sure to specify:

- Customer No.: The customer account who the login relates to.

Users can also be created from the Customer Card/List and Salesperson List Create Login Action.

6.1.1 Disable a Login Account

Select the login account you want to disable, then Delete.

6.1.2 Password Reset

Select the login account you want to reset, then enter a new password in the Password field. User password reset requests are marked as Password Reset Requested

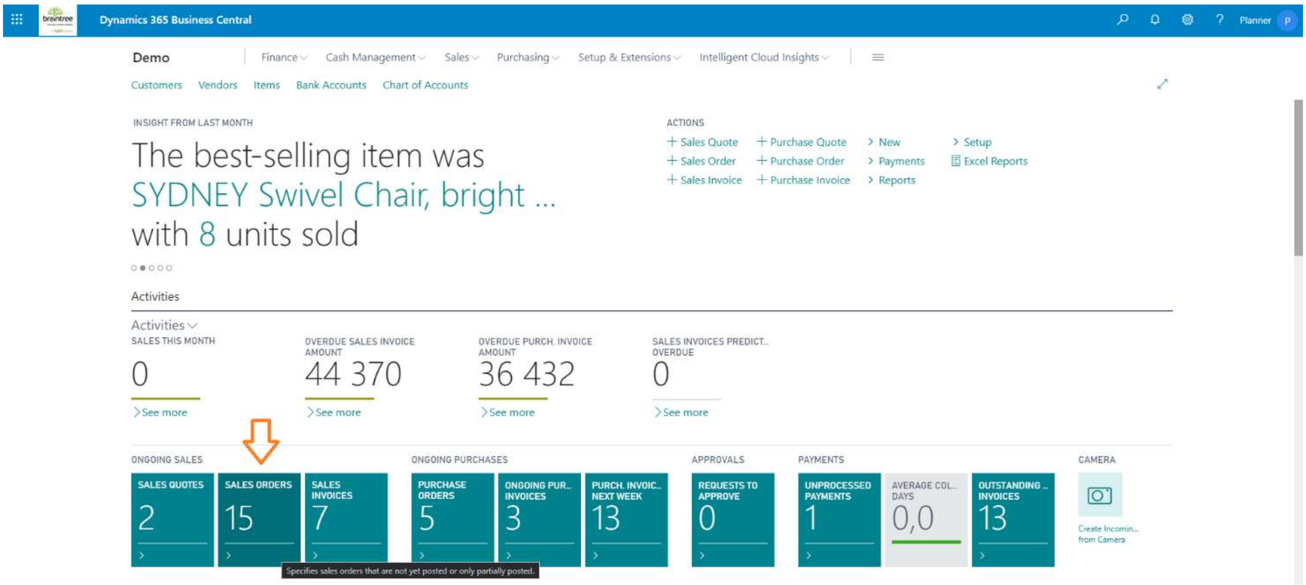
Reset Password: Creates a new random password for the selected. Email is also sent with the password reset steps.

Reset Password (Account No as Psw): does not send an email. Make use of the Reset Password option instead.

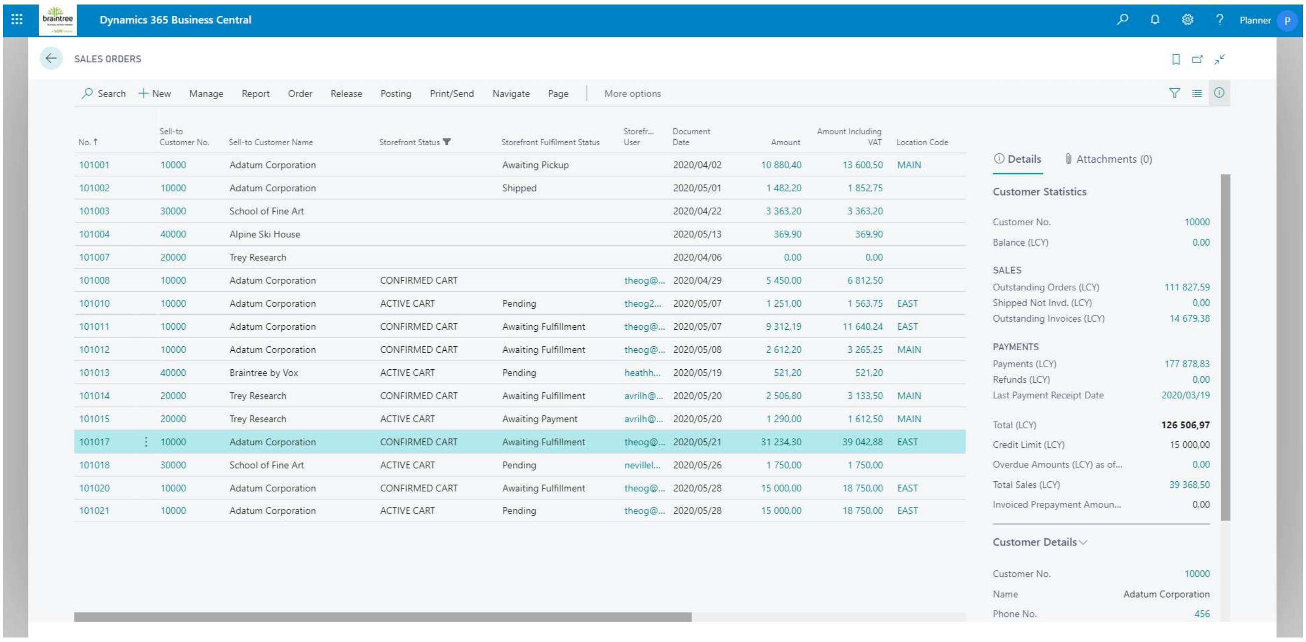
7 Order Processing

Assumes Business Manager Role

Search & navigate to Sales Orders:

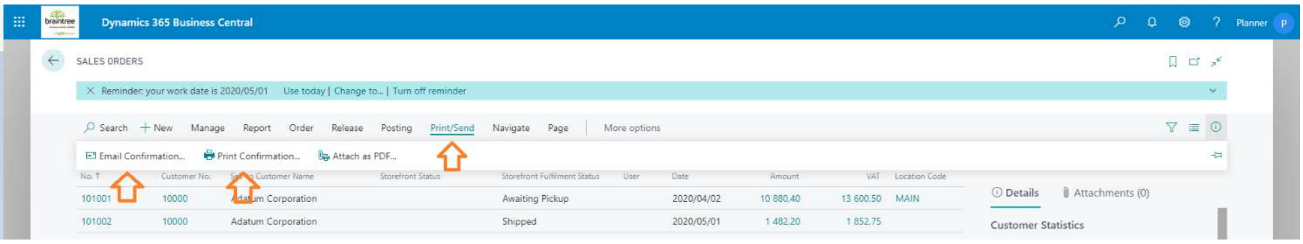


The Sales Orders list show all recent orders and associated Cart and Fulfilment Statuses. Select Manage to edit or view order details.



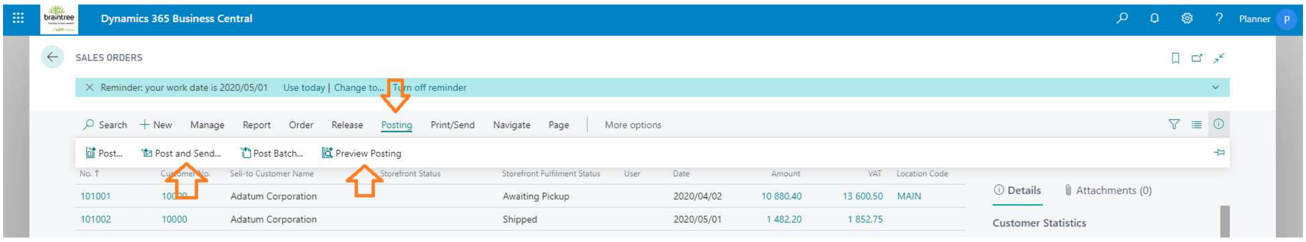
7.1 Send an Order Confirmation

Select an Order, then Print/Send, to print or e-mail an order confirmation:



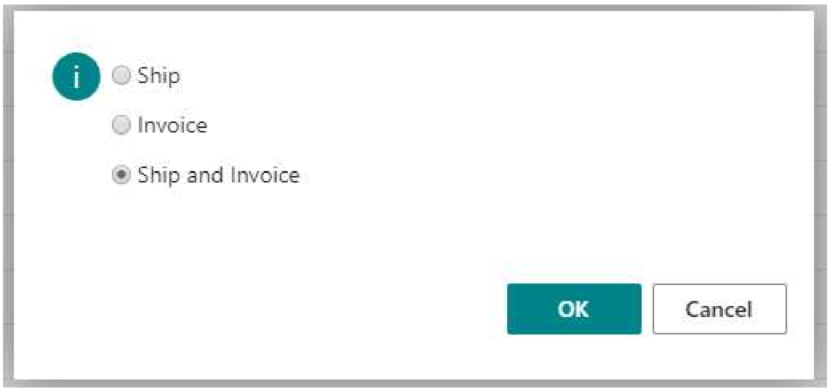
7.2 Process an Order

Select an Order, then Posting and Post & Send, to process an order:

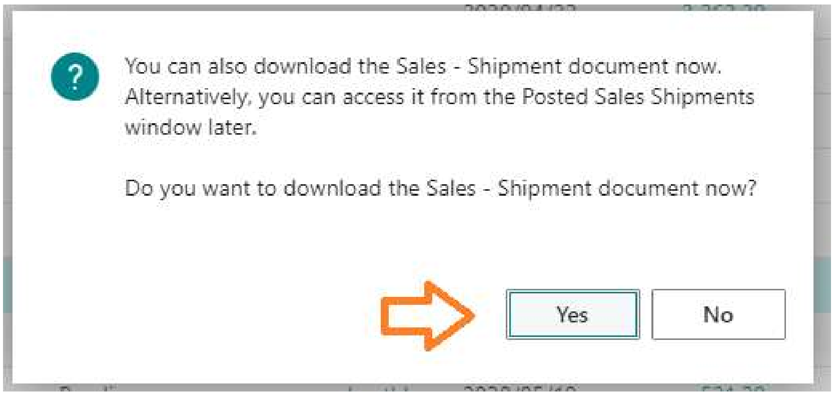


Tip: Use Preview Posting to review your order first.

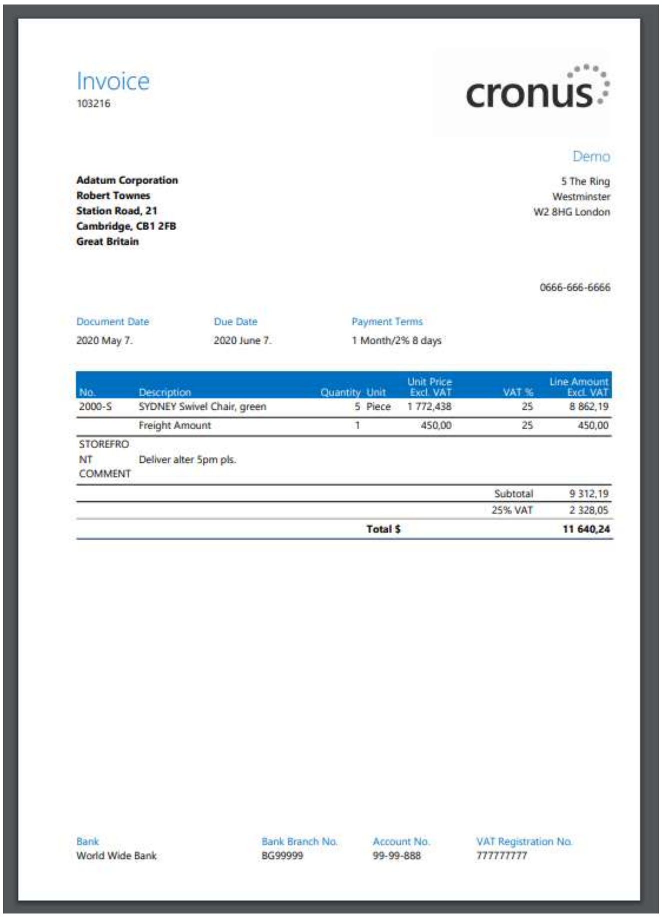
Select Ship and Invoice to process the entire order:



Select Yes to print or download a Shipment Manifest:



Invoice and Shipment Document Templates:



Invoice
103216

cronus

Demo

Adatum Corporation
Robert Townes
Station Road, 21
Cambridge, CB1 2FB
Great Britain

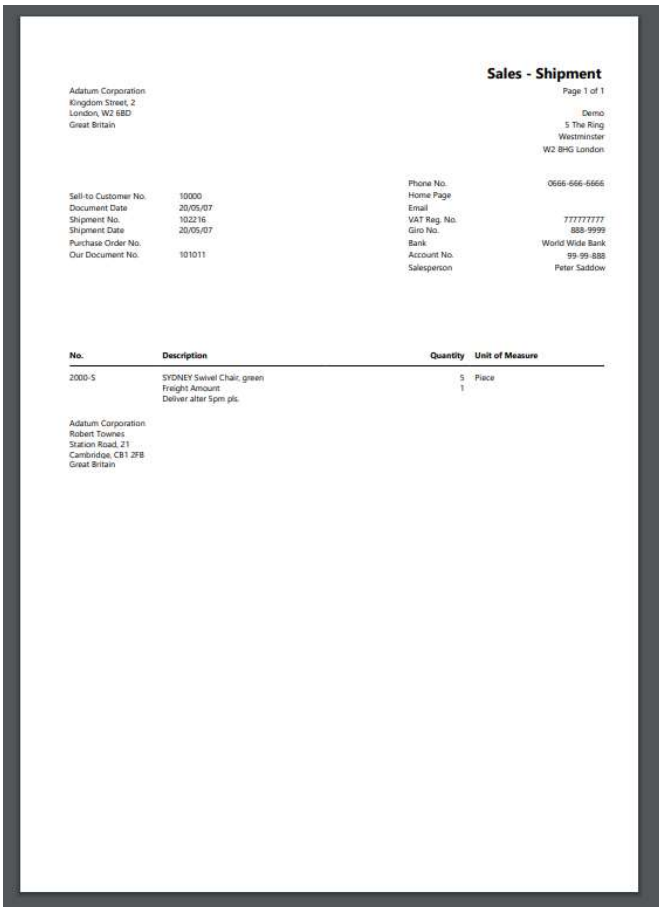
5 The Ring
Westminster
W2 8HG London

0666-666-6666

Document Date	Due Date	Payment Terms
2020 May 7.	2020 June 7.	1 Month/2% 8 days

No.	Description	Quantity	Unit	Unit Price Excl. VAT	VAT %	Line Amount Excl. VAT
2000-S	SYDNEY Swivel Chair, green	5	Piece	1 772,438	25	8 862,19
	Freight Amount	1		450,00	25	450,00
STOREFRONT COMMENT	Deliver alter 5pm pls.					
					Subtotal	9 312,19
					25% VAT	2 328,05
		Total $				11 640,24

Bank	Bank Branch No.	Account No.	VAT Registration No.
World Wide Bank	BG99999	99-99-888	777777777



Sales - Shipment
Page 1 of 1

Adatum Corporation
Kingdom Street, 2
London, W2 6BD
Great Britain

Demo
5 The Ring
Westminster
W2 8HG London

Sell-to Customer No.	10000	Phone No.	0666-666-6666
Document Date	20/05/07	Home Page	
Shipment No.	102216	Email	
Shipment Date	20/05/07	VAT Reg. No.	777777777
Purchase Order No.		Giro No.	888-9999
Our Document No.	101011	Bank	World Wide Bank
		Account No.	99-99-888
		Salesperson	Peter Saddow

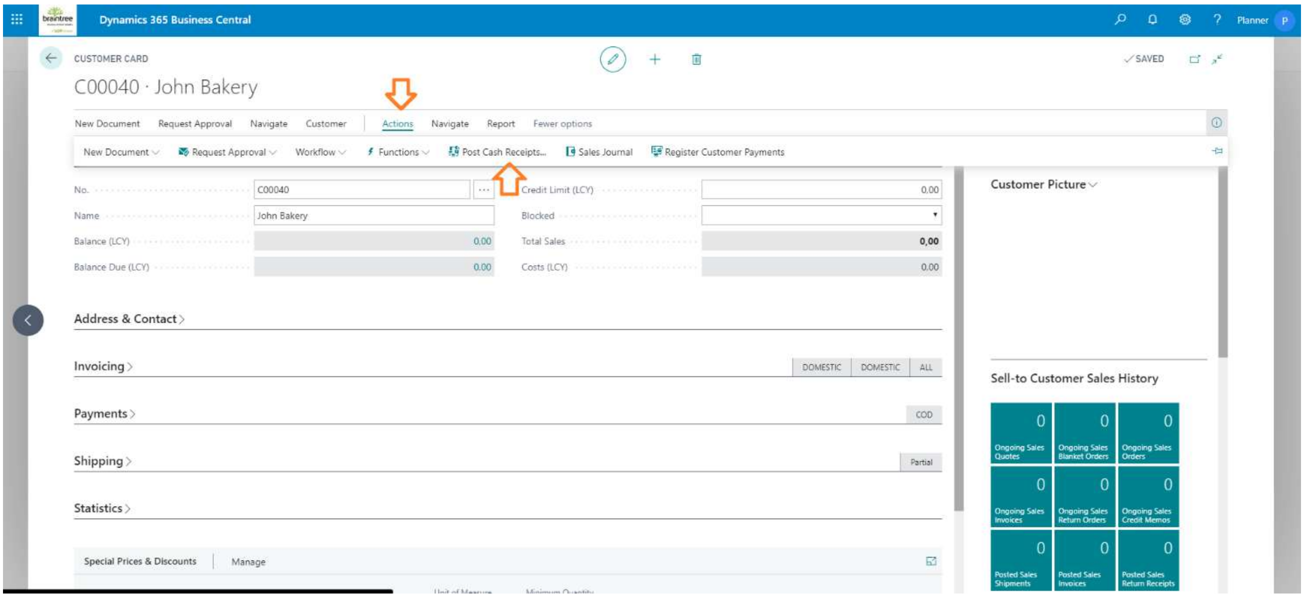
No.	Description	Quantity	Unit of Measure
2000-S	SYDNEY Swivel Chair, green	5	Piece
	Freight Amount	1	
	Deliver alter 5pm pls.		

Adatum Corporation
Robert Townes
Station Road, 21
Cambridge, CB1 2FB
Great Britain

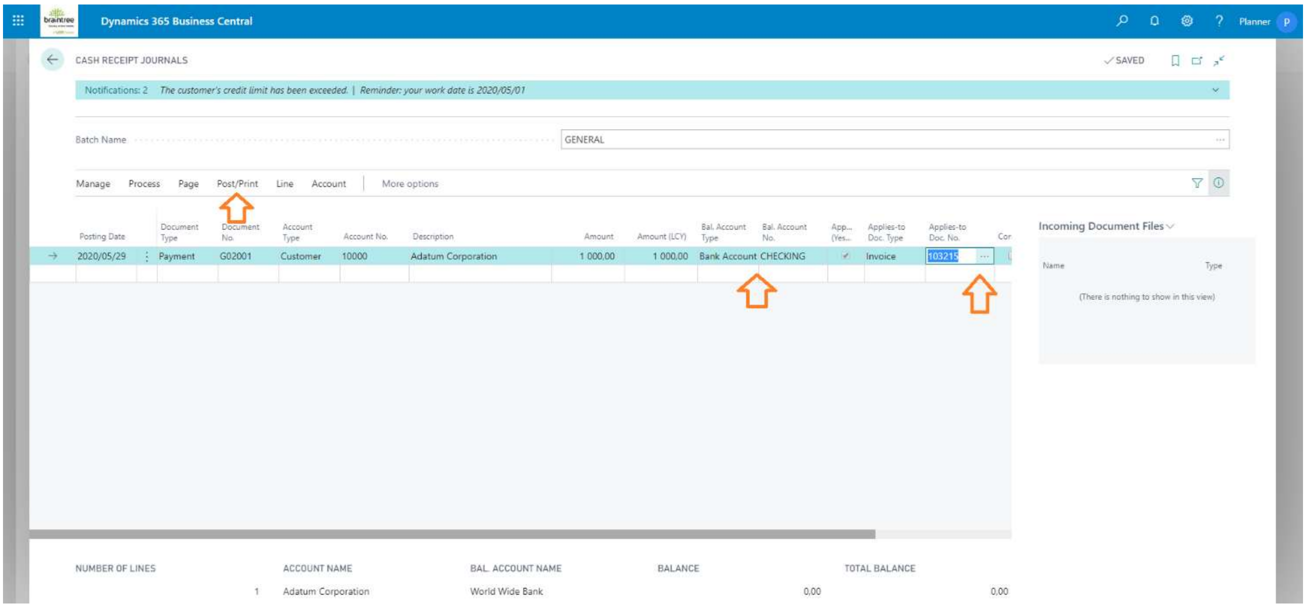
A built-in Microsoft Word report designer is available to change report & document layouts.

7.3 Process a Payment

Search & navigate to Customers. Select or view the Customer Card. Select Actions, then Post Cash Receipts:



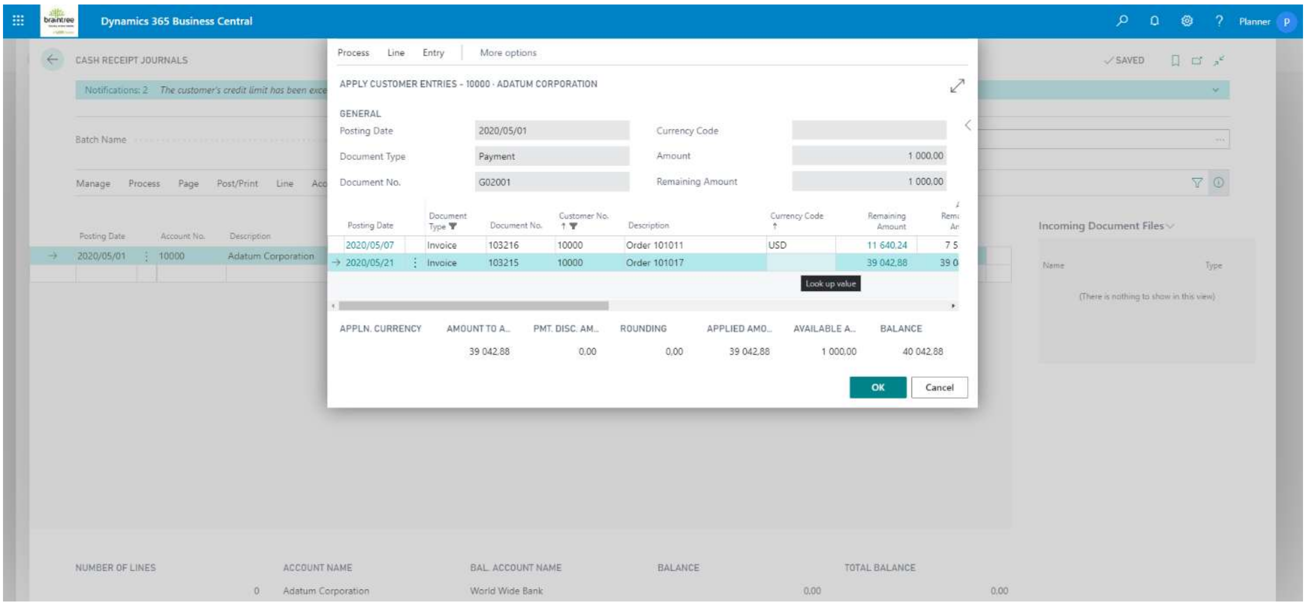
Capture a customer payment:



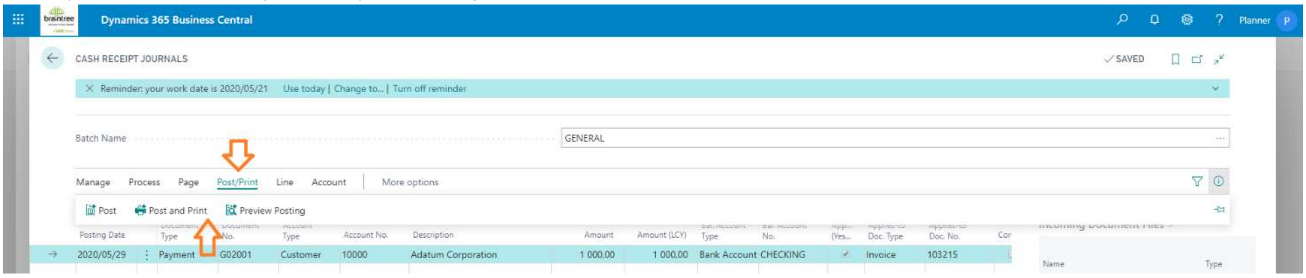
Make sure to specify:

- Posting Date for the payment date
- Document Type: Payment
- Account Type: Customer
- Account No.: The customer's No. you want to pay
- Amount. Amount & Amount (LCY) should be the same for payments in your local currency.
- Bal. Account: Bank
- Bal. Account No.: Your Bank Account Card
- Applies to Doc. Type: Invoice

- Applies-to Doc. No.: Drilldown to select the order invoice that the payment applies to:



Finally process the payment by selecting Post/Print, and Post and Print



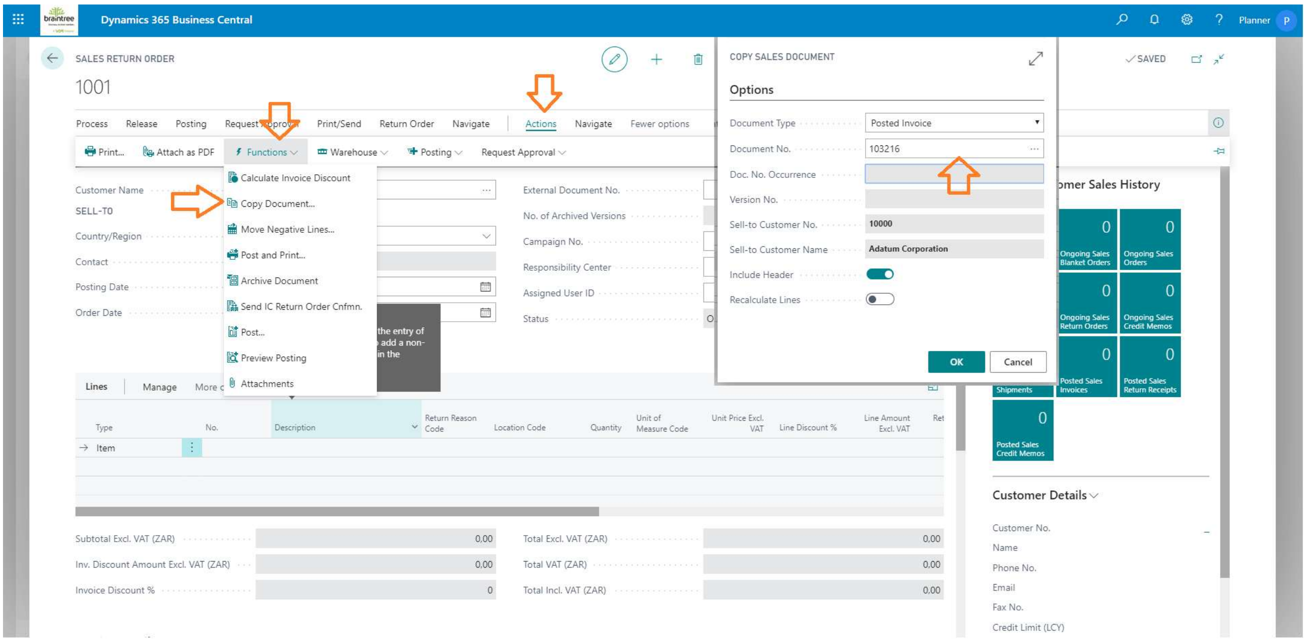
Tip: Use Preview Posting to review posting first.

7.4 Process a Return

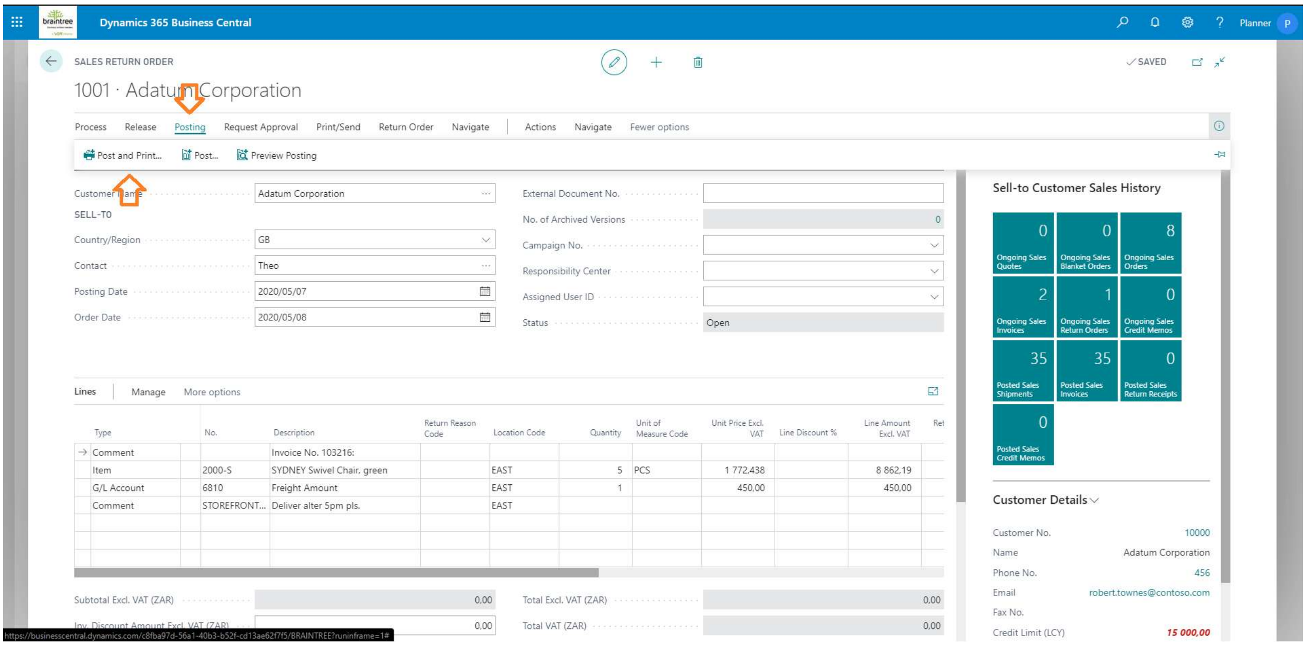
Search & navigate to Sales Return Orders.

Select New to create a new return.

Select the Customer Name field, and then to copy a processed order invoice to return; select Actions > Functions > Copy Document:



Edit the return if necessary, finally select Posting then Post and Print to complete the return order:



Tip: Use Preview Posting to review your order first.

8 Content Management

8.1 Self Service

Users configured as Web Admin, Storefront Identities > Type, will notice a new button available wherever content can be edited:

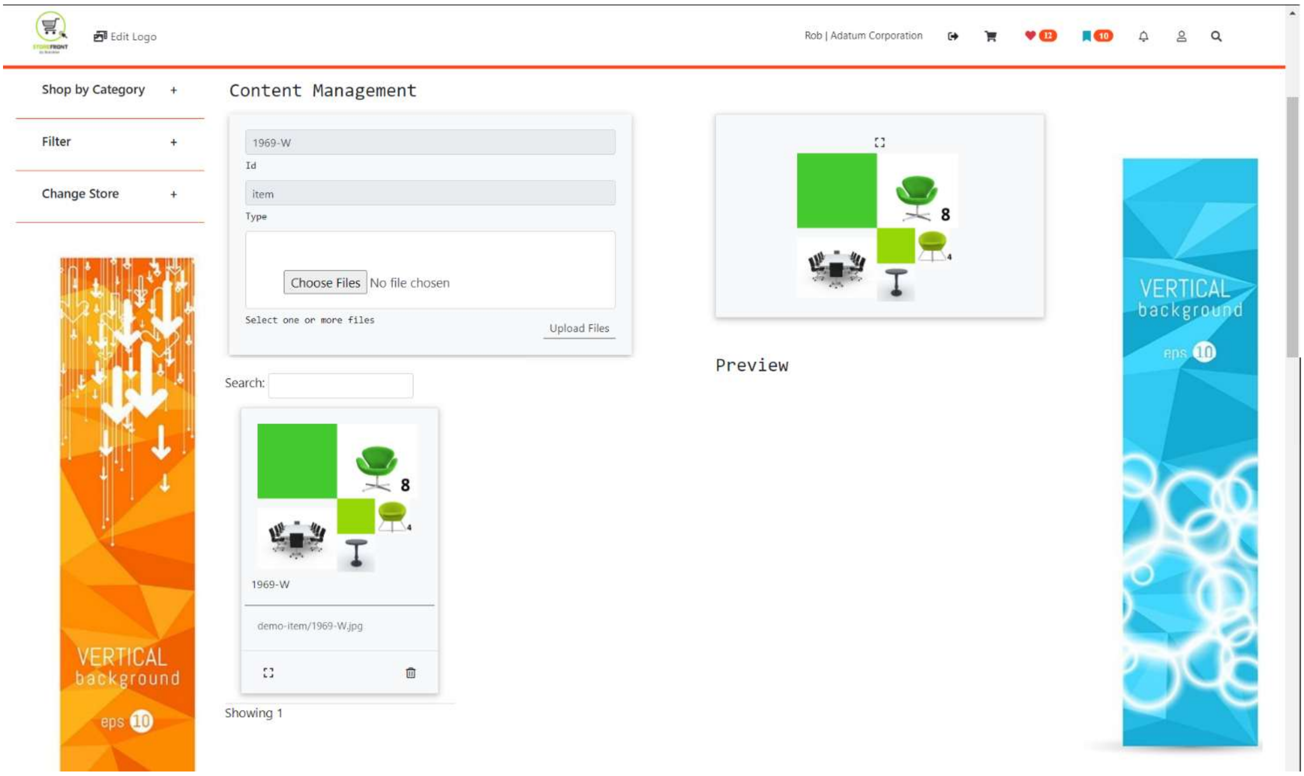
The following content can be edited:

- Logo
- Left and Right Banners
- Left and Right Banners for Customer Price Groups, configured from the Account Page
- Items/Products, configured from the Product Page
- Item/Product Information and Data Sheets, configured from the Product Page
- Items/Product Categories, configured from the Category Page

Supported content:

- Images
- Videos
- Files

Multiple files can be uploaded at the same time.

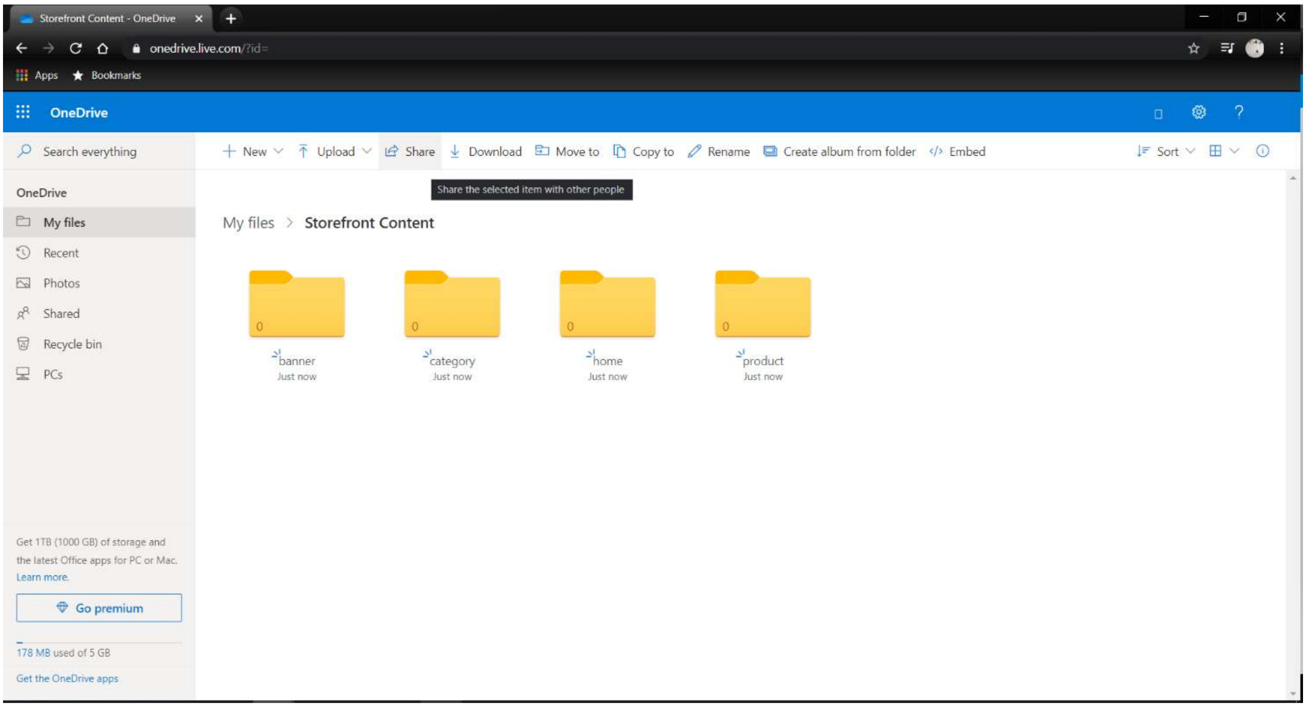


8.2 Static Content – basic CMS

Create a new folder and subfolders on OneDrive as follows:

- Storefront Content
    - banner
    - category
    - home
    - product

Keep these folders up to date with your published products, promoted categories and banners. Ecommerce content updates are applied periodically. Contact us at braintree.support@voxtelecom.co.za to schedule a deployment slot.



Free sign-up here: https://www.microsoft.com/en-za/microsoft-365/onedrive/compare-onedrive-plans

Content file names & naming conventions:

- Banners:

    banner-left.jpg
    banner-right.jpg

- Category:

    <Item Category Code>.jpg

    AUDIO.jpg
    HOME AUDIO.jpg

- Product:

    <Item No.>.jpg
    <Item No.>-<Image No>.jpg

    1000.jpg
    1000-1.jpg

1000-2.jpg
Image file types must be universal for all product content. Default type: jpg.

- Home:
  splash.jpg
  main-1.png
  main-2.png
  main-3.png
  mobile-1.png
  mobile-2.png
  mobile-3.png

9 Payment Service Provider Integration

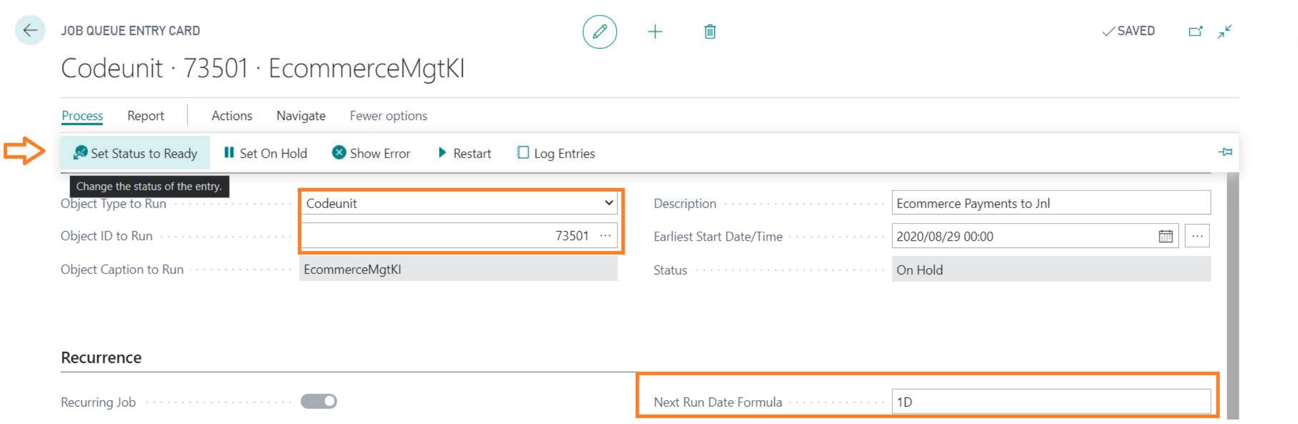
9.1 Online Payments

Payments received online reflect against the Sales Order > Storefront fast tab or Actions > Storefront Payments.

To process these into the General Ledger, Bank and Customer sub ledgers:

- Create a new General Journal Batch for the Cash Receipts Journal Template:
  - Journal Template Name: CASHRCPT
  - Journal Batch Name: ONLINEPMTS
  - Balancing Account Type: Bank
  - Balancing Account No.: relevant Bank.

- Configure a Job Queue to automatically create a journal for payment received. These journal lines can be posted when convenient:
  - Search & navigate to Job Queue Entries
  - Select New
  - Object Type to Run: Codeunit
  - Object ID: 73501
  - Next Run Date Formula: 1D to run once a day



9.2 PayGate

We need the following information from you to enable PayGate as a Payment Service Provider:

- PayGate ID
- PayGate Secret

9.3 Netcash – Pay Now

We need the following information from you to enable PayGate as a Payment Service Provider:

- Pay Now Service Key

10 Tips

10.1 Naming conventions and standards

Item/Product Codes and Item Category Codes should not contain any special characters or spaces.

10.2 Create a Ecommerce Test Account

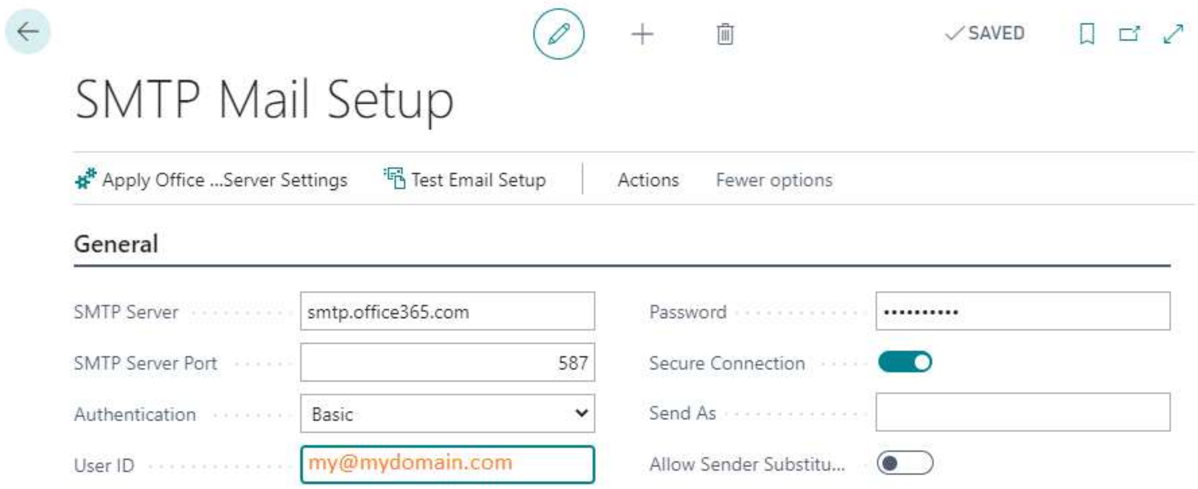
Follow Steps 6 and 7 to create a Customer Card and Login for a Test Account.

10.3 Set up E-mail notifications

E-mail notifications are used to notify ecommerce users of order fulfilment status updates. E-Mail notifications are also required to assist & automate password reset requests.

Search & navigate to SMTP Mail Setup:

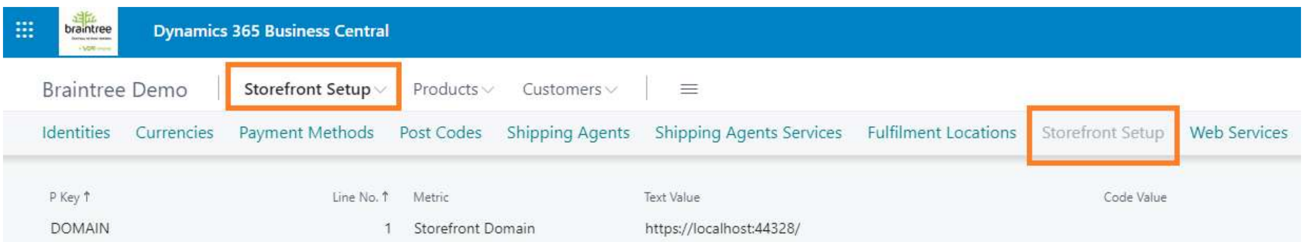
Configure your e-mail account for notifications:



Make sure to use the Test Email Setup option to ensure everything works as expected.

Change your role to Storefront

Select Storefront Setup, then Storefront Setup to configure your ecommerce domain information:



Create or edit the DOMAIN line to specify your ecommerce website url:

- Example:

P Key: DOMAIN

Text Value: http://my-ecommerce-store.com/

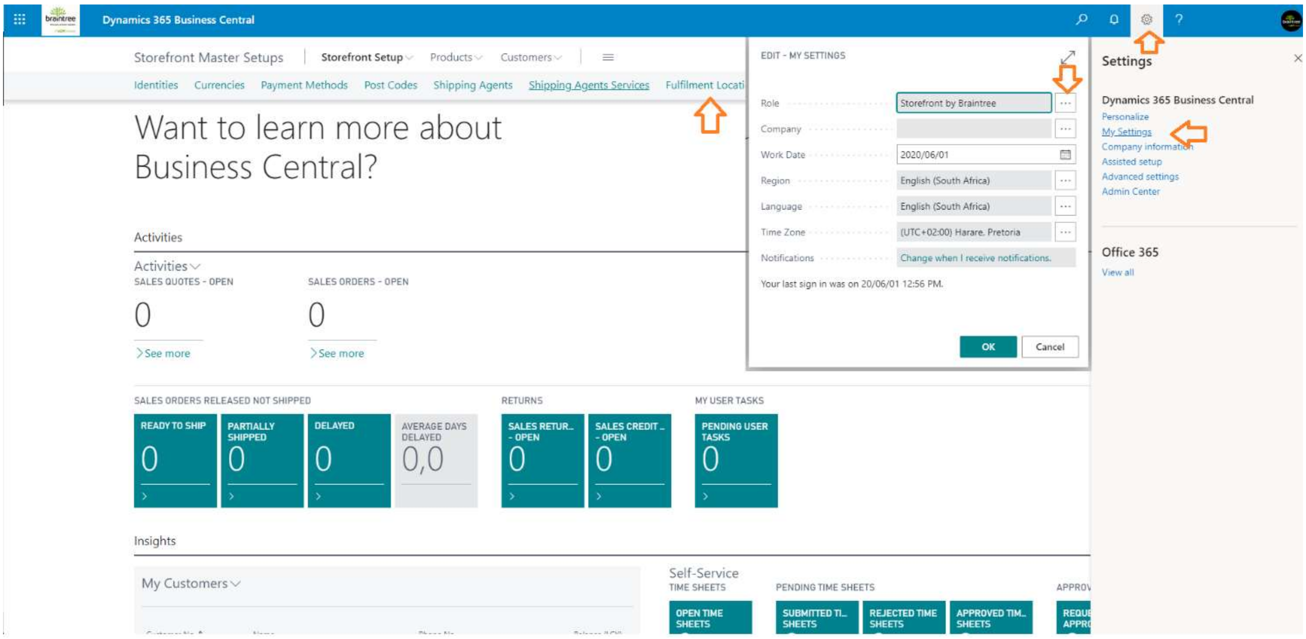
10.4 Email Events

- BC SF User > Reset Password
- BC Sales Order > Updates to the Fulfilment Status

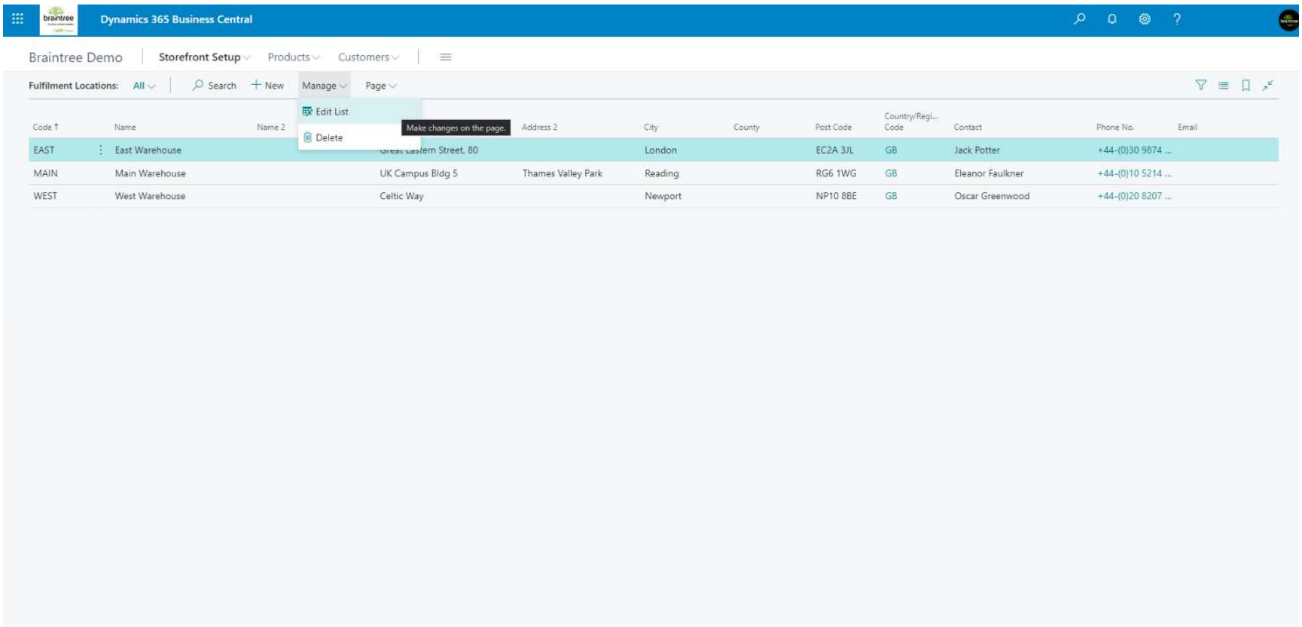
- User website self service
- Cart confirmations (Storefront Status)
  - CONFIRMED CART (Account orders)
  - PAID CART (Paid online)
  - CONFIRMED QUOTE (Quote requested)
- Account > Email Document: Order, Quote, Invoice
- Forgot Password

10.5 Add a Click & Collect Location

Change your role to Storefront:



Select Storefront Setup, then Fulfilment Locations to edit locations:

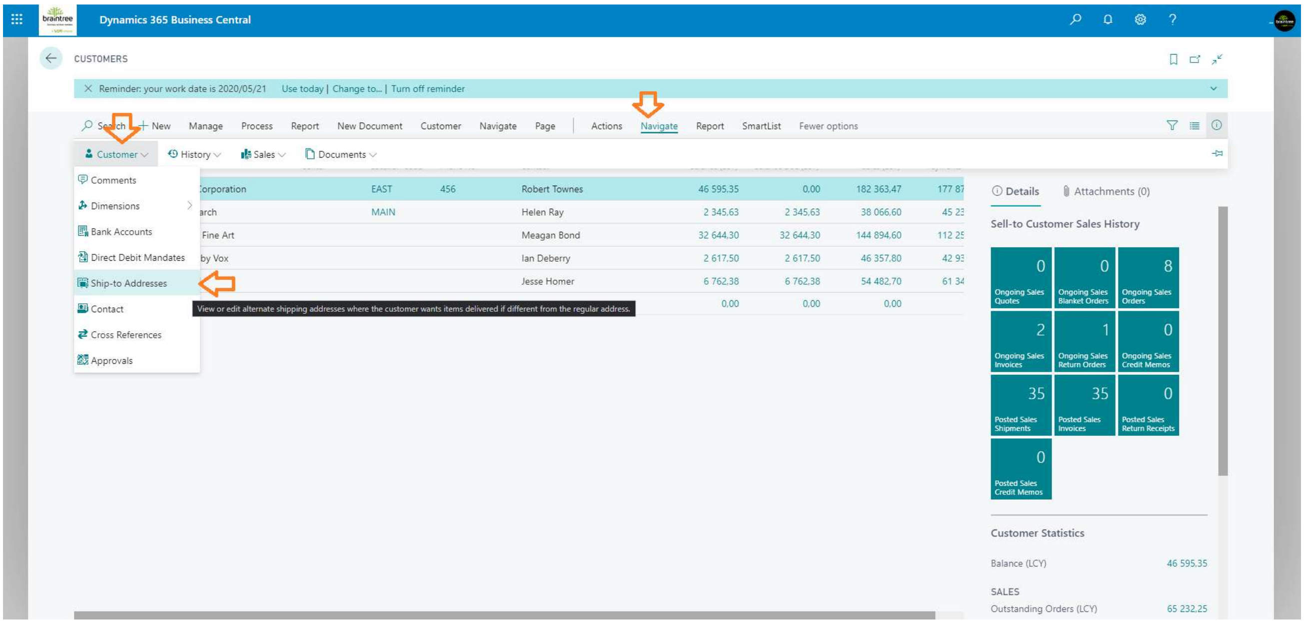

Dynamics 365 Business Central
Braintree Demo
Storefront Setup
Products
Customers
Fulfilment Locations:
All
Search
New
Manage
Page
Edit List
Delete
Make changes on the page.
Code
Name
Name 2
Address 2
City
County
Post Code
Country/Regi... Code
Contact
Phone No.
Email
EAST
East Warehouse
London
EC2A 3JL
GB
Jack Potter
+44-(0)30 9874 ...
MAIN
Main Warehouse
UK Campus Bldg 5
Thames Valley Park
Reading
RG6 1WG
GB
Eleanor Faulkner
+44-(0)10 5214 ...
WEST
West Warehouse
Celtic Way
Newport
NP10 8BE
GB
Oscar Greenwood
+44-(0)20 8207 ...

10.6 Add a Customer Delivery Address

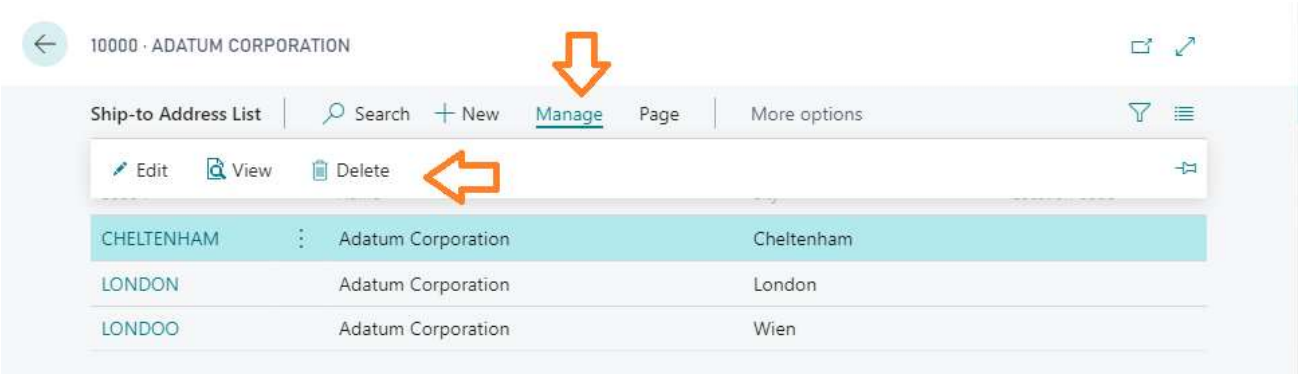
Assumes Business Manager Role

Search & navigate to Customers.

Select the appropriate customer, then More options > Actions > Navigate > Customer > Ship-to Addresses:

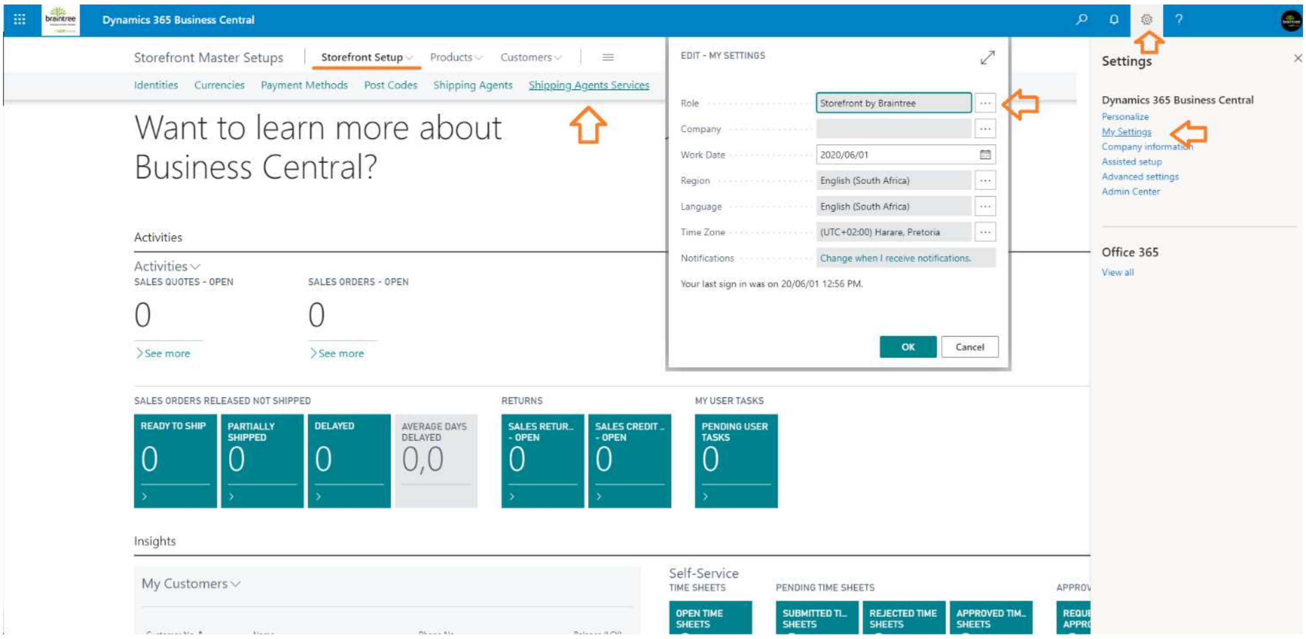


Edit the customer's Ship-to Addresses:



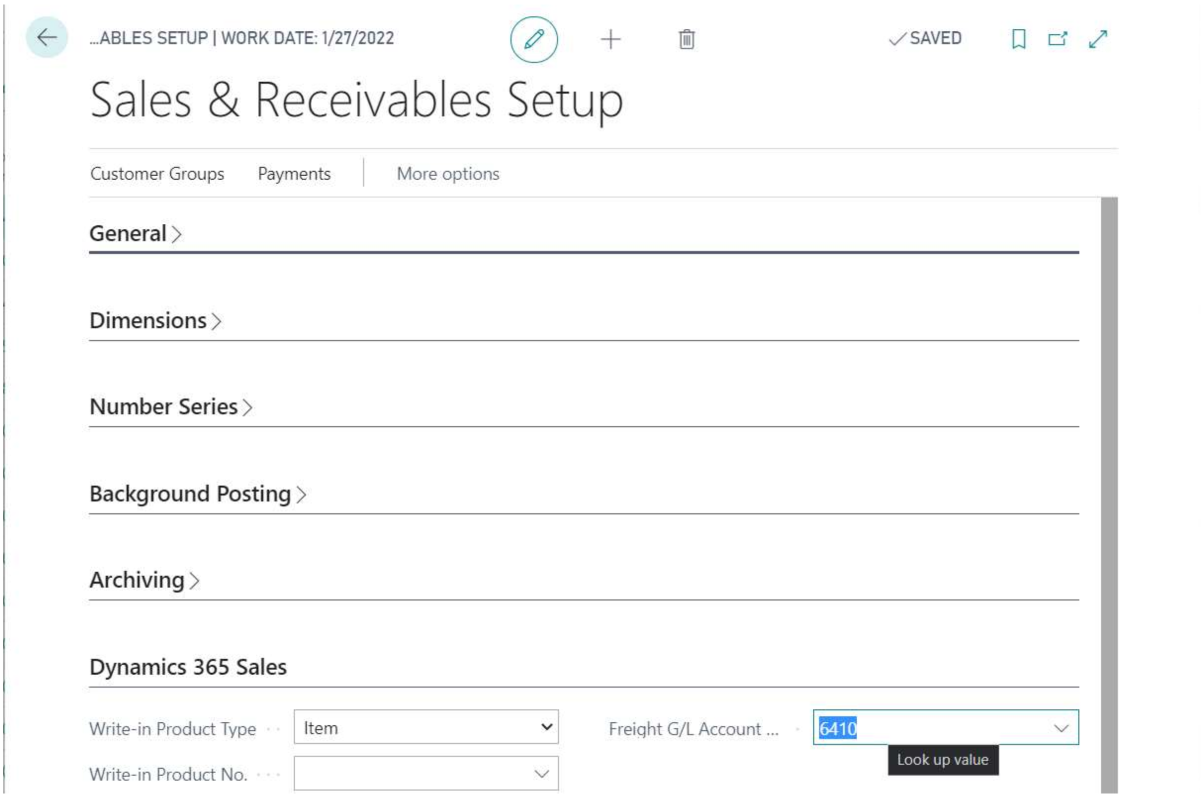
10.7 Add a Shipping Provider & Charge

Change your role to Storefront:



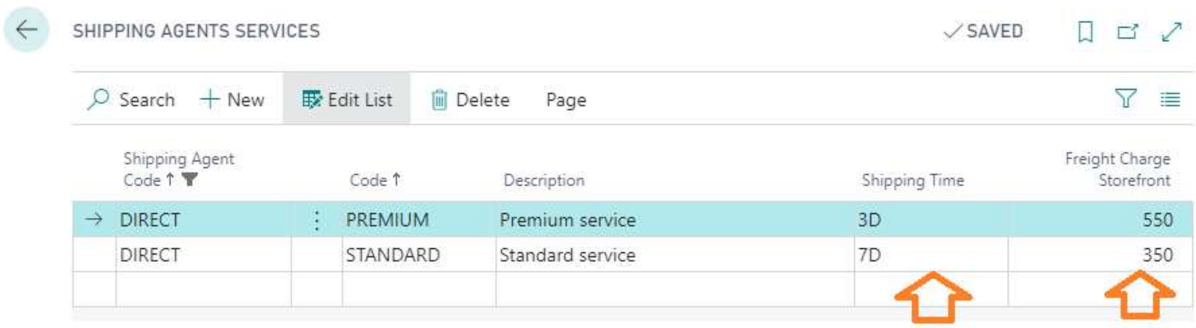
[Search](#) & navigate to Sales & Receivables Setup.

Specify your Shipping Services G/L Account as the Freight G/L Account No.:



Select Storefront Setup, then Shipping Agents to edit providers or Shipping Agent Services to edit services.

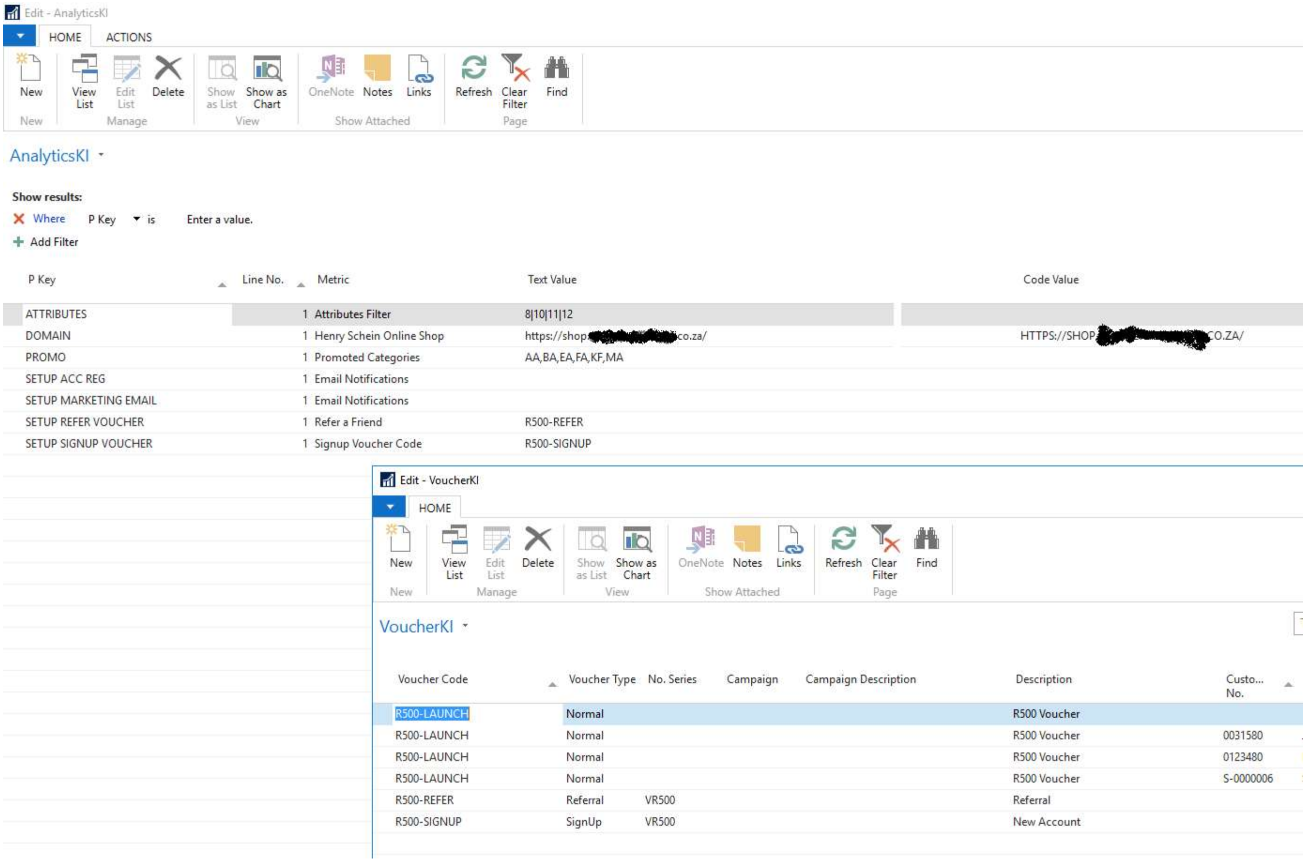
Remember to specify shipping lead times and associated costs:


SHIPPING AGENTS SERVICES ✓SAVED

Search + New Edit List Delete Page

Shipping Agent Code ↑	Code ↑	Description	Shipping Time	Freight Charge Storefront
DIRECT	PREMIUM	Premium service	3D	550
DIRECT	STANDARD	Standard service	7D	350

10.8 Setup


Edit - AnalyticsKI

HOME ACTIONS

New | View List | Edit List | Delete | Show as List | Show as Chart | OneNote | Notes | Links | Refresh | Clear Filter | Find

AnalyticsKI

Show results:

Where P Key is Enter a value.

Add Filter

P Key	Line No.	Metric	Text Value	Code Value
ATTRIBUTES	1	Attributes Filter	8|10|11|12	
DOMAIN	1	Henry Schein Online Shop	https://shop[redacted]co.za/	HTTPS://SHOP[redacted]CO.ZA/
PROMO	1	Promoted Categories	AA,BA,EA,FA,KF,MA	
SETUP ACC REG	1	Email Notifications		
SETUP MARKETING EMAIL	1	Email Notifications		
SETUP REFER VOUCHER	1	Refer a Friend	R500-REFER	
SETUP SIGNUP VOUCHER	1	Signup Voucher Code	R500-SIGNUP	

Edit - VoucherKI

HOME

New | View List | Edit List | Delete | Show as List | Show as Chart | OneNote | Notes | Links | Refresh | Clear Filter | Find

VoucherKI

Voucher Code	Voucher Type	No. Series	Campaign	Campaign Description	Description	Custo... No.
R500-LAUNCH	Normal				R500 Voucher	
R500-LAUNCH	Normal				R500 Voucher	0031580
R500-LAUNCH	Normal				R500 Voucher	0123480
R500-LAUNCH	Normal				R500 Voucher	S-0000006
R500-REFER	Referral	VR500			Referral	
R500-SIGNUP	SignUp	VR500			New Account	

10.9 Cart & Order Statuses

User	Storefront Status	Fulfilment Status	Comment

Add a product to create a new cart	ACTIVE CART	Pending	
Confirm the Cart	CONFIRMED CART	Await Payment	Implies “To Account”, if not paid online
Proceed to pay online	PAID CART	Awaiting Fulfilment	

11 System Requirements

Supported browsers:

- Microsoft Edge 84.0
- Google Chrome 77.0
- Mozilla Firefox 69.0
- Safari 12.0

12 Conclusion

For additional assistance, please contact us at info@braintree.co.za.