

Dynamics 365

Business Central

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



Business without borders

A VOX Company

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1 Introduction



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 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.

The screenshot shows a search interface with a search bar at the top containing the text 'Items'. Below the search bar, there are three main sections: 'On current page (Business Manager)', 'Go to Pages and Tasks', and 'Go to Reports and Analysis'. Under 'On current page (Business Manager)', there are three items: 'Sales Quote', 'Sales Order', and 'Sales Invoice'. Under 'Go to Pages and Tasks', there are three items: 'Items', 'Catalog Items', and 'Teams'. Under 'Go to Reports and Analysis', there are three items: 'Items per Job', 'Assembly BOM - End Items', and 'Item Registers'. At the bottom of the interface, there is a section titled 'Documentation' with two items: 'Create and Manage Catalog Items' and 'Move Items'.

2.3 My Settings

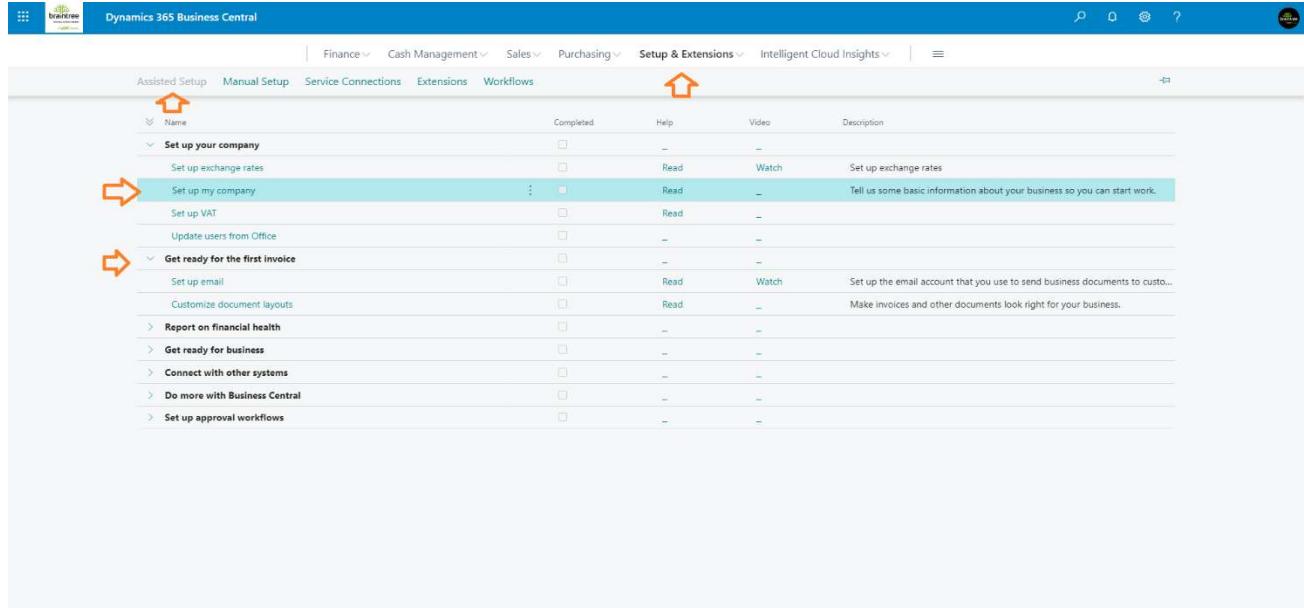
Change your user profile's Role. Start by using the BUSINESS MANAGER or SALES ORDER PROCESSING Role.

The screenshot shows the Dynamics 365 Business Central home page. A settings overlay is open, showing the 'Edit - My Settings' dialog. The 'Role' field is set to 'Business Manager'. There are two orange arrows pointing from the right side of the screen towards the 'Business Manager' role selection and the 'OK' button in the dialog. The background shows various dashboard cards and navigation links.

2.4 Assisted Setup

Assumes Business Manager Role

Set up your company information, including address, contact info & logos: [Set up my company](#):



The screenshot shows the Dynamics 365 Business Central interface with the 'Assisted Setup' tab selected. The main content area displays a list of setup steps under the 'Set up my company' section. The first step, 'Set up my company', is highlighted with a blue background and has an orange arrow pointing to it from the left. Another orange arrow points to the 'Get ready for the first invoice' section below it. The table columns include 'Name', 'Completed', 'Help', 'Video', and 'Description'. The 'Description' column for 'Set up my company' states: 'Tell us some basic information about your business so you can start work.'

| Name | Completed | Help | Video | Description |
|--|-------------------------------------|------|-------|--|
| Set up exchange rates | <input type="checkbox"/> | Read | Watch | Set up exchange rates |
| Set up my company | <input checked="" type="checkbox"/> | Read | — | Tell us some basic information about your business so you can start work. |
| Set up VAT | <input type="checkbox"/> | Read | — | |
| Update users from Office | <input type="checkbox"/> | — | — | |
| Get ready for the first invoice | <input type="checkbox"/> | — | — | |
| Set up email | <input type="checkbox"/> | Read | Watch | Set up the email account that you use to send business documents to custo... |
| Customize document layouts | <input type="checkbox"/> | Read | — | Make invoices and other documents look right for your business. |
| Report on financial health | <input type="checkbox"/> | — | — | |
| Get ready for business | <input type="checkbox"/> | — | — | |
| Connect with other systems | <input type="checkbox"/> | — | — | |
| Do more with Business Central | <input type="checkbox"/> | — | — | |
| Set up approval workflows | <input type="checkbox"/> | — | — | |

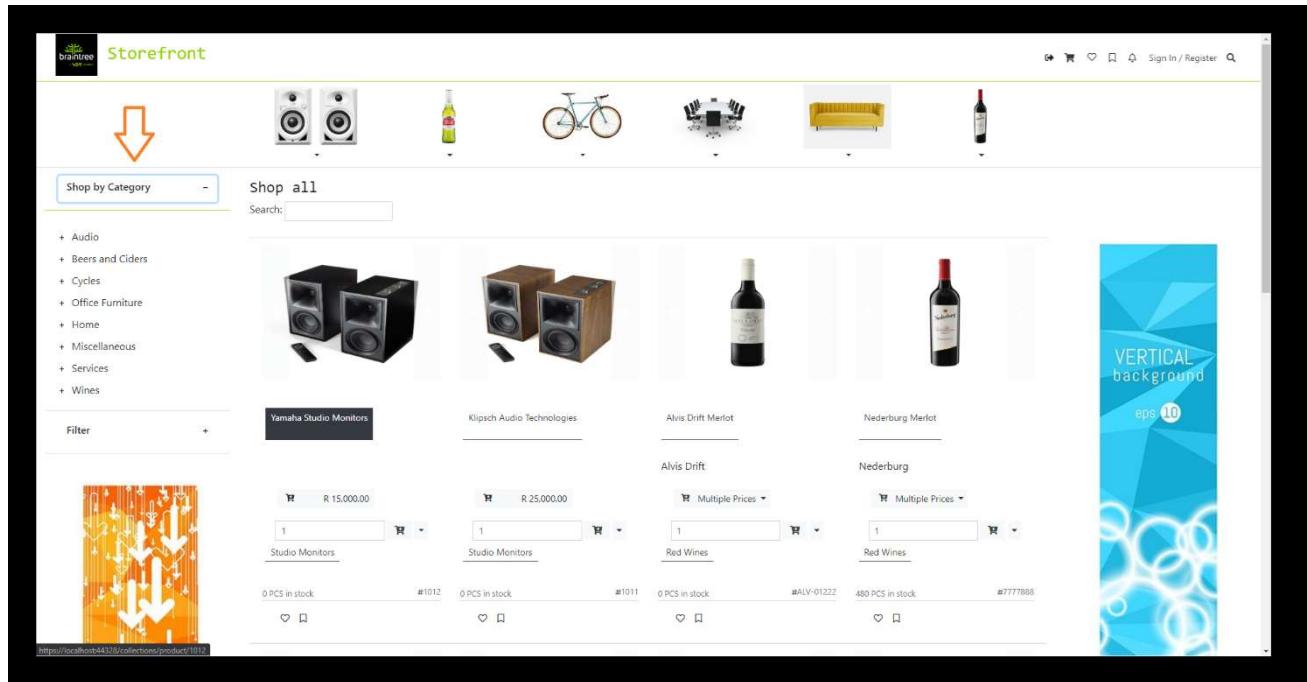
Also consider setting up email and tailoring document layout under [Get ready for the first invoice](#). You can always come back to this step.

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:

TELL ME WHAT YOU WANT TO DO

Item cat

Go to Pages and Tasks

Show all (6)

> Item Categories

Administration

Dynamics 365 Business Central

ITEM CATEGORIES

Code

| | | Parent | Description |
|--|----------------|--------|-------------------------|
| | AUDIO | | Audio |
| | FLOOR STANDING | Audio | Floor Standing Speakers |
| | MONITORS | Audio | Audio |
| | CYCLES | | Cycles |
| | MTB | Cycles | Mountain Bikles |
| | MTB-SHIRTS | MTB | Shirts |
| | MTB-SHORTS | MTB | Shorts |
| | ROAD | Cycles | Road Bikes |
| | ROAD-SHIRTS | | Shirts |
| | ROAD-SHORTS | | Shorts |

3.1 Create a new Category

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

ITEM CATEGORY CARD

AUDIO

✓ SAVED

Delete

General

| | | | |
|-------------------|-------|---------------------------------|----------------------------------|
| Code | AUDIO | Parent Category | <input type="button" value="▼"/> |
| Description | Audio | <input type="button" value=""/> | |

Attributes | Manage

| Attribute ↑ | Default Value | Unit of Measure | Inherited From |
|-------------|---------------|-----------------|----------------|
| → | | | |
| | | | |
| | | | |

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:

ITEM CATEGORY CARD

FLOOR STANDING

General

Code: FLOOR STANDING

Parent Category: AUDIO

Description: Floor Standing Speakers

Attributes: Manage

| Attribute ↑ | Default Value | Unit of Measure | Inherited From |
|-------------|---------------|-----------------|----------------|
| → Brand | Yamaha | | |

Ecommerce Brand attribute filters:

Storefront

Shop by Category + Shop all

Brand

Klipsch Audio Technologies

Yamaha

Yamaha Studio Monitors

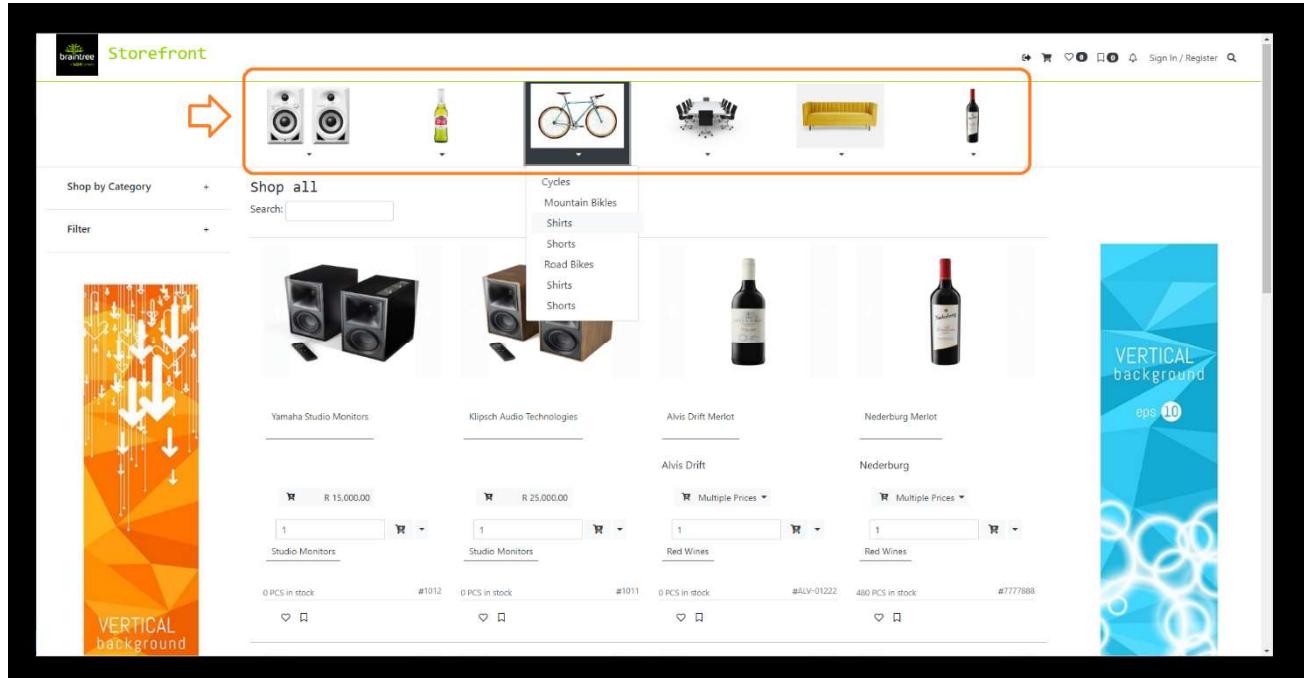
Klipsch Audio Technologies Studio Monitors

Alvis Drift Merlot

Nederburg Merlot

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:

A screenshot of the Dynamics 365 Business Central interface. The top navigation bar includes "Dynamics 365 Business Central", "Braintree Demo", "Storefront Setup" (which is highlighted with an orange box), "Products", "Customers", and "Web Services". Below the navigation is a sub-menu with links like "Identities", "Currencies", "Payment Methods", "Post Codes", "Shipping Agents", "Shipping Agents Services", "Fulfilment Locations", "Storefront Setup" (highlighted with an orange box again), and "Web Services". A table titled "P Key ↑" lists promoted categories. The first row has a "P Key" of "ATTRIBUTES", a "Line No." of "1", a "Metric" of "Filter Attributes", and a "Text Value" of "8|9|11". The second row has a "P Key" of "DOMAIN", a "Line No." of "1", a "Metric" of "Storefront Domain", and a "Text Value" of "https://localhost:44328/". The third row has a "P Key" of "PROMO", a "Line No." of "1", a "Metric" of "Promoted Categories Filter", and a "Text Value" of "AUDIO,BEERS AND CIDERS,CYCLES,FURNITURE,WINES,HOME". Two orange arrows point from the left towards the "PROMO" row.

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

ANALYTICS(KI)

Search + New Edit List Delete Page

Views All

Filter list by:

P Key PROMO

+ Filter... Reset filters

P Key ↑ Metric Line No. ↑ Text Value Code Value Date Value
PROMO 1 Promoted Categories Filter AUDIO.BEERS AND CIDERS.CYCLES.FURNITURE.WINES.HOME 2020/05/28 12:30...

This screenshot shows a Dynamics 365 Business Central interface. The top navigation bar includes the Dynamics 365 logo, a search bar, and various navigation icons. Below the header, there's a breadcrumb trail labeled 'ANALYTICS(KI)'. The main area features a table with columns: P Key, Metric, Line No., Text Value, Code Value, Date Value, and DateTime Value. A single row is present in the table, with the P Key set to 'PROMO', Metric to 'Promoted Categories Filter', Text Value to 'AUDIO.BEERS AND CIDERS.CYCLES.FURNITURE.WINES.HOME', and Date Value to '2020/05/28 12:30...'. On the left side, there's a sidebar with sections for 'Views' (set to 'All'), 'Filter list by' (with a dropdown for 'P Key' containing 'PROMO'), and buttons for '+ Filter...' and 'Reset filters'.

4 List a Product

4.1 Create an Item

Assumes Business Manager Role

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

The screenshot shows the Dynamics 365 Business Central Home page. At the top, there's a banner stating "The best-selling item was SYDNEY Swivel Chair, bright ... with 8 units sold". Below this, there are several key performance indicators (KPIs):

- SALES THIS MONTH: 0
- OVERDUE SALES INVOICE AMOUNT: 44 370
- OVERDUE PURCH. INVOICE AMOUNT: 36 432
- SALES INVOICES PREDICTED OVERDUE: 0

Below these are sections for ONGOING SALES and ONGOING PURCHASES, each with three cards showing counts for Sales Quotes, Sales Orders, Sales Invoices, Purchase Orders, Purchase Invoices, and Purchase Invoices Next Week.

On the right side, there are sections for APPROVALS (0 requests), PAYMENTS (1 unprocessed payment), and OUTSTANDING INVOICES (13). A camera icon is also present for creating incoming items from the camera.

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

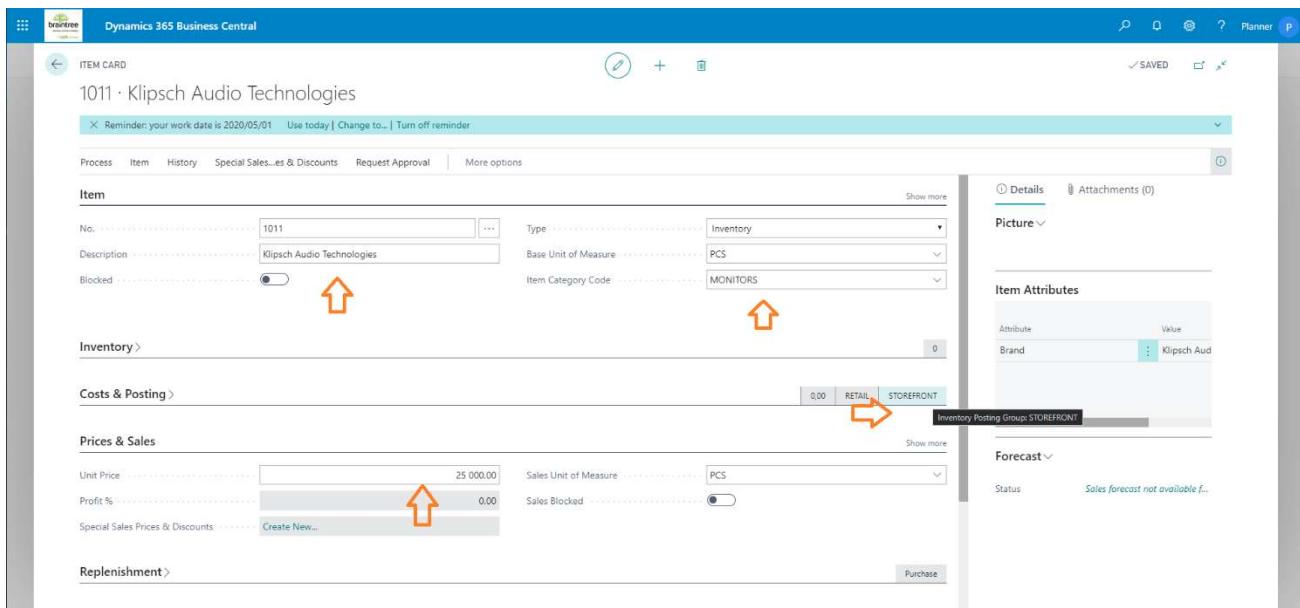
The screenshot shows the Dynamics 365 Business Central Item creation dialog. On the left, a list of existing items is shown, and at the top right, there's a "New" button with a red arrow pointing to it. A modal window titled "SELECT A TEMPLATE FOR A NEW ITEM" is open, listing various templates:

- Description
- Item Zero VAT
- Miscellaneous
- Storefront - Auto No. Series
- Storefront - Manual No. Series

On the right side of the dialog, detailed information for the selected template is displayed, including:

- Details - Invoicing:
 - Method: FIFO
 - Adjusted: Yes
 - Allocated to G/L: Yes
 - Cost: 10.41667
 - Overhead Rate: 0.00
 - Indirect Cost %: 0
 - Last Direct Cost: 10.41667
 - Profit %: 13.19442
 - Unit Price: 15.00
- Item Details - Planning:
 - Item No.: 1001
 - Reordering Policy
 - Reorder Point: 0
 - Reorder Quantity: 0
 - Maximum Inventory: 0
 - Overflow Level: 0
 - Time Bucket
 - Lot Accumulation Period
 - Rescheduling Period

A large orange arrow points to the "OK" button at the bottom right of the dialog.



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

The screenshot shows the Dynamics 365 Business Central interface. On the left, the 'ITEM CARD' for item 1011 is displayed. The 'Special Sales... & Discounts' tab is highlighted with an orange box. The main content area shows a table of sales prices for different customer price groups. To the right, there's a preview of two speakers and their attributes.

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**

The screenshot shows the Microsoft Dynamics NAV interface. The 'Configuration Packages' screen is displayed. The 'Import from Excel' button is highlighted with an orange box. The search bar shows 'conf'. A list of configuration packages is shown, with 'STOREFRONT PRICES' selected.

- 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
 - o Config. Package Card:

The screenshot shows the 'Edit - Config. Package Card - STOREFRONT PRICES' interface. The 'Actions' bar includes buttons for Get Table, View, New, Delete, Export Package, Import Package, Apply Package, Validate Package, Refresh, Clear Filter, Go to Previous Page, and Go to Next Page. The main area displays a table for 'STOREFRONT PRICES' with a single row for '7002 Sales Price'. The 'No. of Package Errors' column is highlighted with an orange box and contains the value '0'. A modal dialog titled 'Config. Package Records' is overlaid, showing a table with one row and the same 'No. of Package Errors' value of 0.

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

Import File Format:



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
 - o STOREFRONT PIM
 - o STOREFRONT PIM-SHORT
 - o Don't specify a Line No for new entries.

4.6 Related Products / Variants

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

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

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:

The screenshot shows the Dynamics 365 Business Central interface. At the top, there's a navigation bar with links like Demo, Finance, Cash Management, Sales, Purchasing, Setup & Extensions, Intelligent Cloud Insights, and Planner. Below the navigation bar, there's a search bar and a camera icon. A large orange arrow points to the 'Customers' link in the navigation bar. The main content area displays a summary of sales activity from the previous month. It includes a message: 'The best-selling item was SYDNEY Swivel Chair, bright ... with 8 units sold'. Below this, there are four cards: 'Activities' (0 sales this month), 'OVERDUE SALES INVOICE AMOUNT' (44 370), 'OVERDUE PURCH. INVOICE AMOUNT' (36 432), and 'SALES INVOICES PREDICT... OVERDUE' (0). Further down, there are sections for 'ONGOING SALES' (Sales Quotes: 2, Sales Orders: 15, Sales Invoices: 7) and 'ONGOING PURCHASES' (Purchase Orders: 5, Ongoing Purch. Invoices: 3, Purch. Invoic... Next Week: 13). There are also sections for 'APPROVALS' (0 requests to approve), 'PAYMENTS' (1 unprocessed payment, Average Col... Days: 0,0), and 'OUTSTANDING INVOICES' (13 outstanding invoices). On the right side, there's a 'CAMERA' button with the text 'Create Incomin... from Camera'.

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

Dynamics 365 Business Central

Customers: All | Search | New | Delete | ...

Reminder: your work date is 2020/05/01 | Use today | Change to... | Turn off reminder

SELECT A TEMPLATE FOR A NEW CUSTOMER

Description

- Blank Customer Card
- Cash-Payment / Retail Customer (Cash)
- EFT Customer (Bank Transfer)**
- Account Customer (Account)

OK | Cancel

Customer Statistics

| | |
|----------------------------|-----------|
| Balance (LCY) | 6 762,38 |
| SALES | |
| Outstanding Orders (LCY) | 0,00 |
| Shipped Not Invd. (LCY) | 0,00 |
| Outstanding Invoices (LCY) | 5 698,63 |
| PAYMENTS | |
| Payments (LCY) | 61 341,02 |

Dynamics 365 Business Central

CUSTOMER CARD

C00040 · John

New Document | Request Approval | Navigate | Customer | Actions | Navigate | Report | Fewer options

General

| | | | |
|-------------------|--------|--------------------|------|
| No. | C00040 | Credit Limit (LCY) | 0,00 |
| Name | John | Blocked | |
| Balance (LCY) | 0,00 | Total Sales | 0,00 |
| Balance Due (LCY) | 0,00 | Costs (LCY) | 0,00 |

Address & Contact

| | |
|---------------------|--------------|
| ADDRESS | CONTACT |
| Address | Contact Name |
| Address 2 | Phone No. |
| Country/Region Code | Email |
| City | Home Page |
| County | |
| Post Code | |

Invoicing >

Sell-to Customer Sales History

| | | |
|------------------------|------------------------------|------------------------------|
| Ongoing Sales Quotes | Ongoing Sales Blanket Orders | Ongoing Sales Orders |
| 0 | 0 | 0 |
| Ongoing Sales Invoices | Ongoing Sales Return Orders | Ongoing Sales Credit Memos |
| 0 | 0 | 0 |
| Posted Sales Shipments | Posted Sales Invoices | Posted Sales Return Receipts |
| 0 | 0 | 0 |

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:

| Code ↑ | Description |
|-----------|----------------------------|
| → ACCOUNT | : Payment on account |
| BANK | Bank Transfer |
| COD | Payment on delivery/pickup |
| PAYGATE | PayGate Online Payment |
| | |

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:

| E-Mail ↑ | Customer Name | Company Name | Name |
|---------------|---------------|---------------|------|
| → dave@ki.com | John Bakery | John's Bakery | Dave |

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 screenshot shows the Dynamics 365 Business Central homepage. At the top, there's a banner with the text "The best-selling item was SYDNEY Swivel Chair, bright ... with 8 units sold". Below this, there's a section titled "Activities" with various metrics like "OVERDUE SALES INVOICE AMOUNT" (44 370), "OVERDUE PURCH. INVOICE AMOUNT" (36 432), and "SALES INVOICES PREDICT... OVERDUE" (0). A red arrow points to the "SALES ORDERS" card, which shows 15 items. To the right, there's a "CAMERA" section with a camera icon and a note about incoming files from the camera.

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

The screenshot shows the "SALES ORDERS" list page. The main grid displays 15 rows of order details, including columns for "No.," "Sell-to Customer No.," "Sell-to Customer Name," "Storefront Status," "Storefront Fulfilment Status," "Storefr... User," "Document Date," "Amount," "Amount Including VAT," and "Location Code." One row is highlighted in blue. To the right of the grid, there are several sections: "Customer Statistics" (Customer No. 10000, Balance 0.00), "SALES" (Outstanding Orders 111 827.59, Shipped Not Invd. 0.00, Outstanding Invoices 14 679.38), "PAYMENTS" (Payments 177 878.83, Refunds 0.00, Last Payment Receipt Date 2020/03/19), and "Customer Details" (Customer No. 10000, Name Adatum Corporation, Phone No. 456).

7.1 Send an Order Confirmation

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

The screenshot shows the Dynamics 365 Business Central interface for Sales Orders. The top navigation bar includes 'Dynamics 365 Business Central' and various search and management icons. Below the header, a message says 'Reminder: your work date is 2020/05/01 Use today | Change to... | Turn off reminder'. The main menu bar has items like 'Search', 'New', 'Manage', 'Report', 'Order', 'Release', 'Posting', 'Print/Send', 'Navigate', 'Page', and 'More options'. The 'Print/Send' option is highlighted with an orange arrow. The main content area displays a table of sales orders with columns for 'No.', 'Customer No.', 'Customer Name', 'Storefront Status', 'Storefront Fulfillment Status', 'User', 'Date', 'Amount', 'VAT', and 'Location Code'. Two specific rows are highlighted with orange arrows: row 101001 (Customer No. 10000, Adatum Corporation) and row 101002 (Customer No. 10000, Adatum Corporation). At the bottom right of the table, there are 'Details' and 'Attachments (0)' buttons.

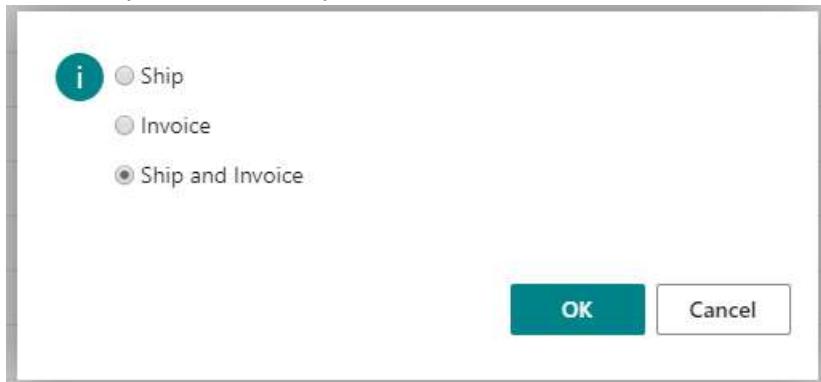
7.2 Process an Order

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

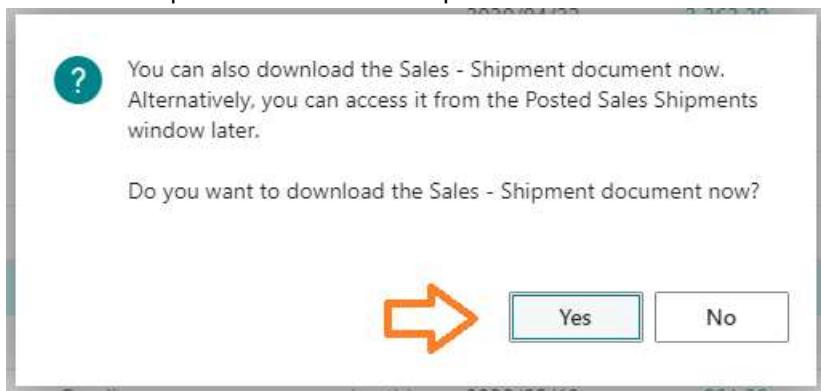
This screenshot shows the same Dynamics 365 Business Central Sales Orders screen as the previous one, but with different menu highlights. The 'Posting' option in the top menu bar is highlighted with an orange arrow. The main content area shows the same table of sales orders. The 'Post...', 'Post and Send...', and 'Post Batch...' buttons in the toolbar are also highlighted with orange arrows. The rest of the interface is identical to the first screenshot.

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 |
|--------|----------------------------|----------|-------|----------------------|----------|-----------------------|
| 2000-5 | SYDNEY Swivel Chair, green | 5 | Piece | 1 772,438 | 25 | 8 862,19 |
| | Freight Amount | 1 | | 450,00 | 25 | 450,00 |
| | | | | | | |
| | | | | Subtotal | 9 312,19 | |
| | | | | 25% VAT | 2 328,05 | |
| | | | | | | Total \$ |
| | | | | | | 11 640,24 |

STOREFRO
NT Deliver after 5pm pls.
COMMENT

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

Sales - Shipment
Page 1 of 1

Adatum Corporation
Kingston Street, 2
London, W2 8BD
Great Britain

Demo
5 The Ring
Westminster
W2 8HG London

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

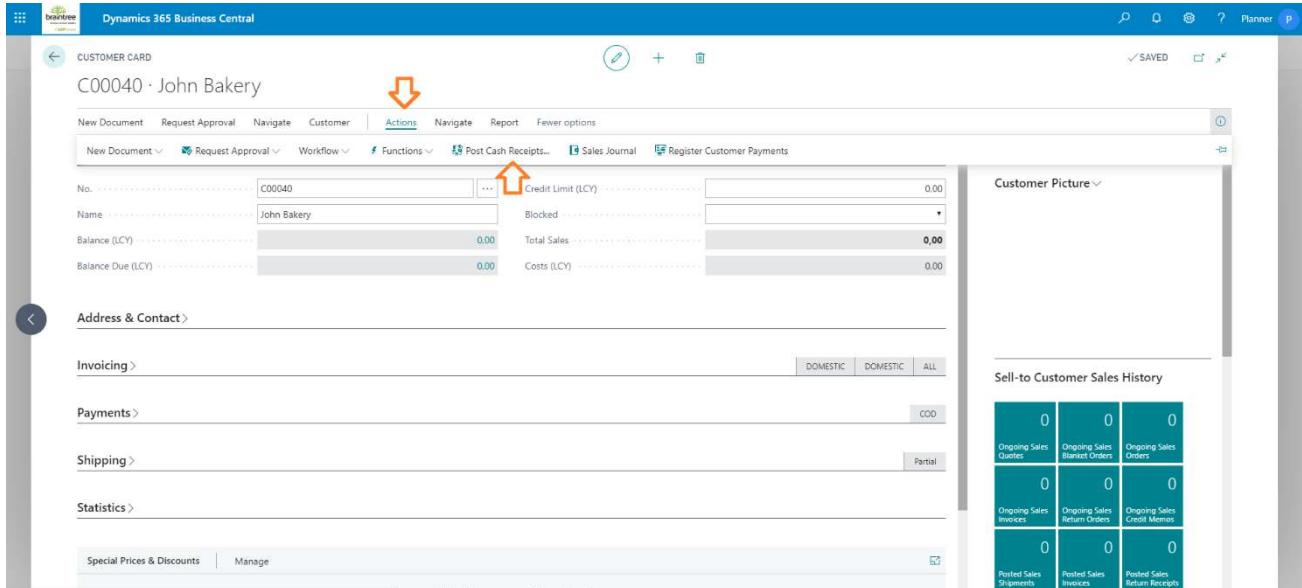
| No. | Description | Quantity | Unit of Measure |
|--------|--|----------|-----------------|
| 2000-5 | SYDNEY Swivel Chair, green Freight Amount Deliver after 5pm pls. | 5 | Piece |
| | | 1 | |

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

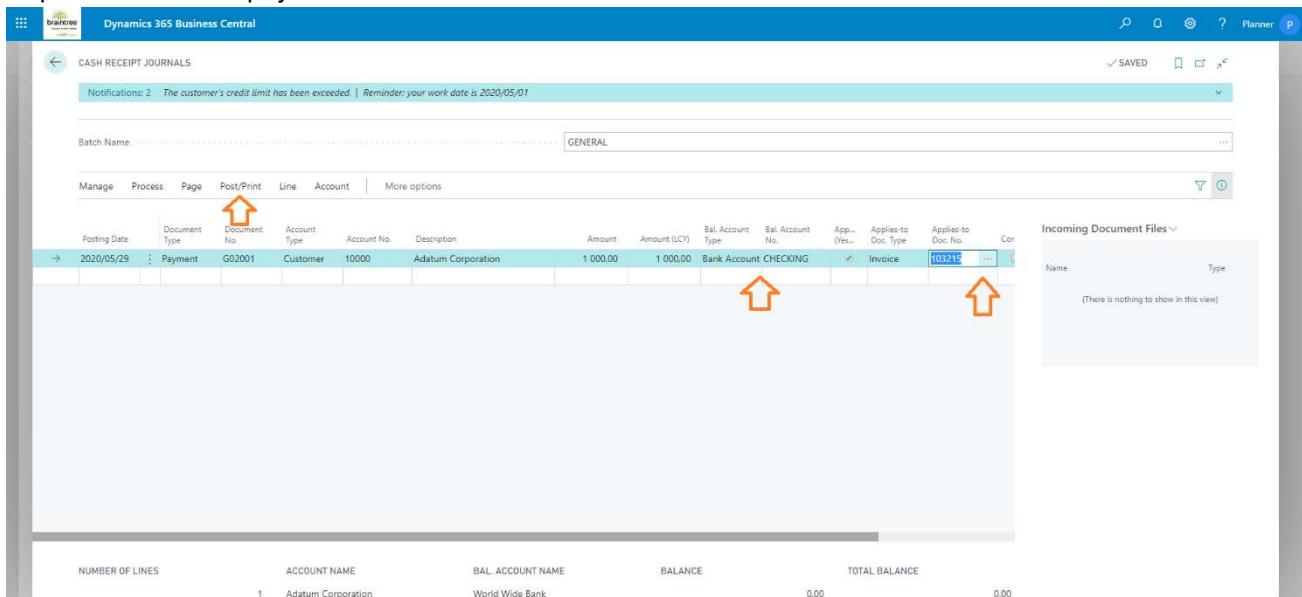
A built-in Microsoft Word report designer is available to change report & document layouts.

7.3 Process a Payment

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



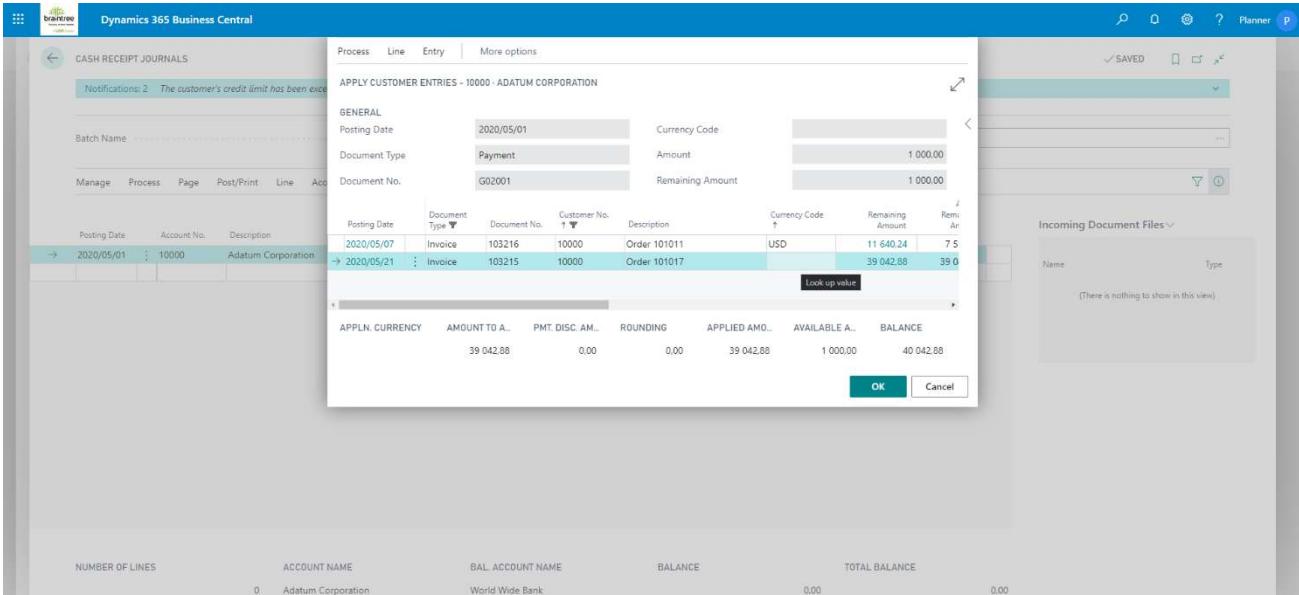
Capture a customer payment:



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



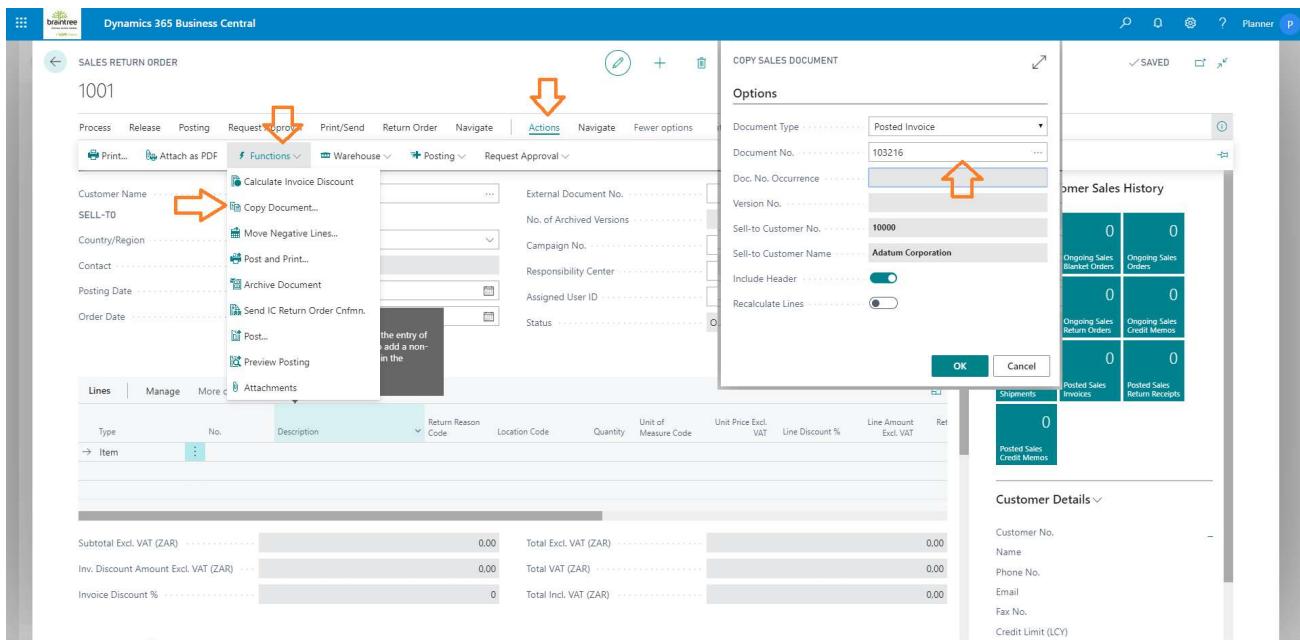
Tip: Use Preview Posting to review posting first.

7.4 Process a Return

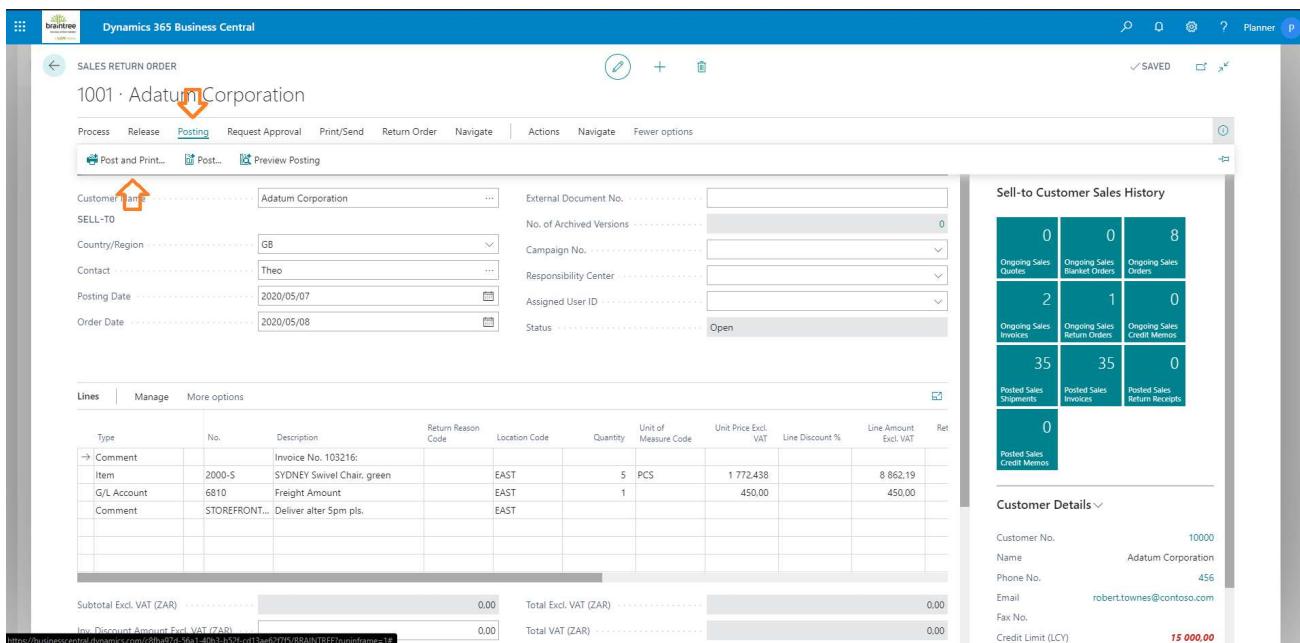
Search & navigate to Sales Return Orders.

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: 

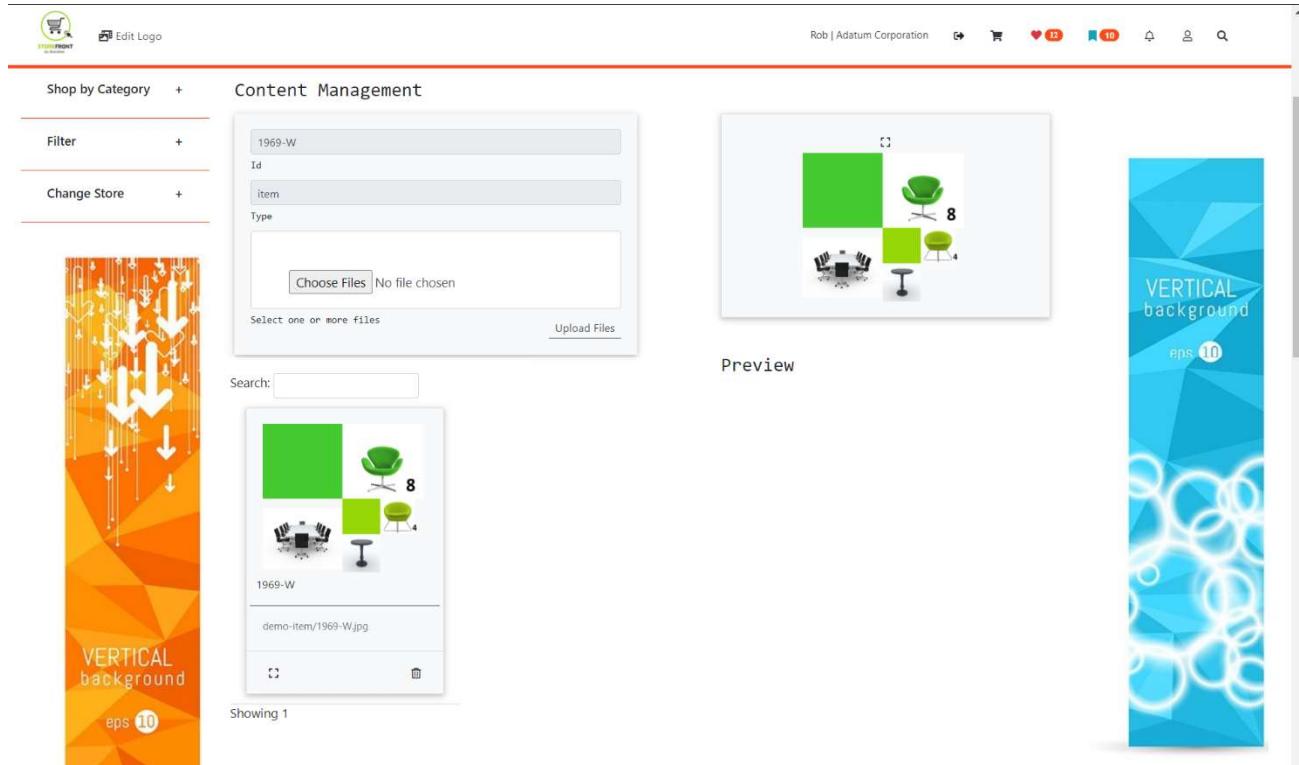
The following content can be edited:

- 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.



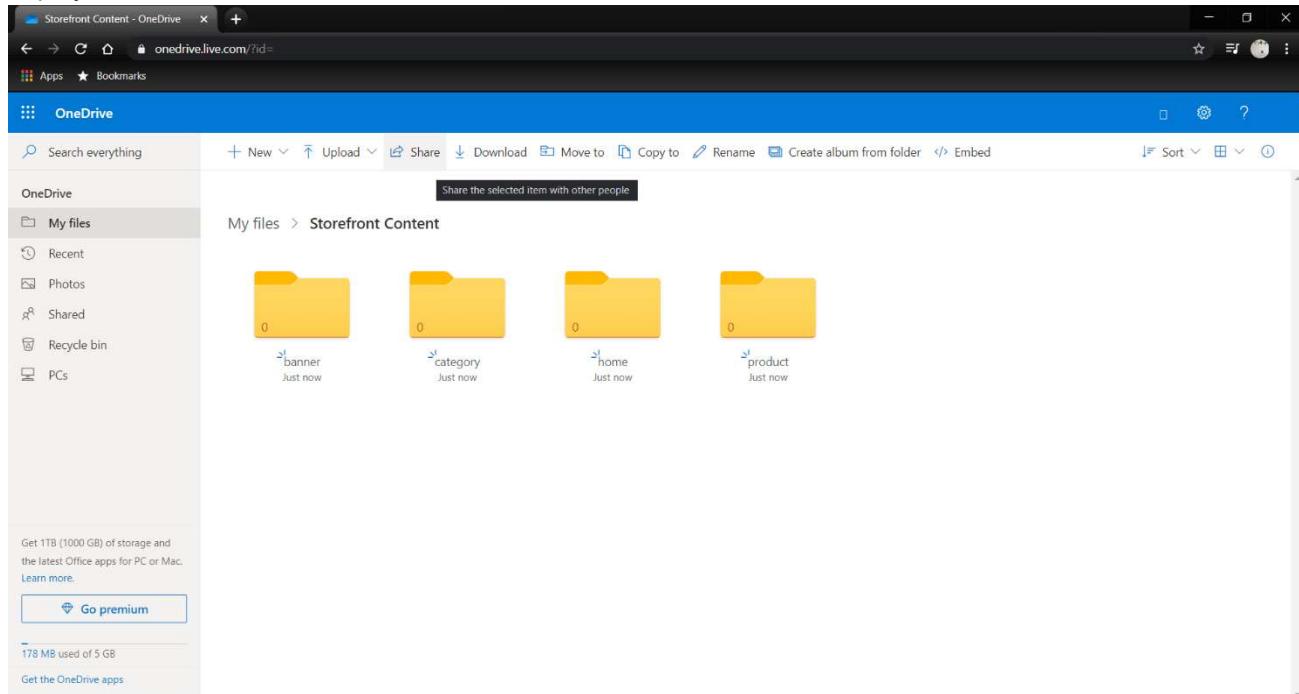
The screenshot shows the Content Management page. On the left, there's a sidebar with 'Shop by Category' and 'Content Management' sections, and a large orange background image labeled 'VERTICAL background eps 10'. In the center, there's a search bar and a file upload form with fields for 'Id' (containing '1969-W'), 'Type' (containing 'item'), and a 'Choose Files' button with 'No file chosen'. Below it is a 'Select one or more files' input field and an 'Upload Files' button. To the right, there's a preview area showing a grid of four items: a green square, a green chair, a black chair, and a small green chair, each with a number (8, 1, 2, 4) next to it. A vertical blue background image labeled 'VERTICAL background eps 10' is also visible on the right side.

8.2 Static Content – basic CMS

Create a new folder and subfolders on OneDrive as follows:

- Storefront Content
 - o banner
 - o category
 - o home
 - o 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

The screenshot shows the 'JOB QUEUE ENTRY CARD' for a job entry. The entry is for 'Codeunit · 73501 · EcommerceMgtKI'. The 'Actions' tab is selected. A red arrow points to the 'Set Status to Ready' button. The 'Description' field contains 'Ecommerce Payments to Jnl'. The 'Object Type to Run' dropdown is set to 'Codeunit'. The 'Object ID to Run' dropdown is set to '73501'. The 'Object Caption to Run' field shows 'EcommerceMgtKI'. The 'Earliest Start Date/Time' is set to '2020/08/29 00:00'. The 'Status' is 'On Hold'. Under 'Recurrence', the 'Recurring Job' toggle is off, and the 'Next Run Date Formula' is set to '1D'.

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:

The screenshot shows the Dynamics 365 Business Central search interface. A search bar at the top contains the text "smtp". Below the search bar is a list of results under "Go to Pages and Tasks" with "Show all (50)" options. One result, "SMTP Mail Setup", is highlighted with a green arrow icon and has a blue border around it. The navigation bar below includes "Administration" and a magnifying glass icon.

Configure your e-mail account for notifications:

The screenshot shows the "SMTP Mail Setup" page. At the top, there are buttons for "Apply Office ...Server Settings", "Test Email Setup" (which is highlighted with a green border), "Actions", and "Fewer options". Below this is a section titled "General" with the following fields:

- SMTP Server: smtp.office365.com
- SMTP Server Port: 587
- Authentication: Basic
- User ID: my@mydomain.com (highlighted with a green border)
- Password: (redacted)
- Secure Connection: On (switch is green)
- Send As: (empty field)
- Allow Sender Substitu...: Off (switch is grey)

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:

The screenshot shows the "Storefront Setup" page in Dynamics 365 Business Central. The top navigation bar has "Storefront Setup" highlighted with a red box. The main content area shows a table with one row:

| P Key ↑ | Line No. ↑ | Metric | Text Value | Code Value |
|---------|------------|-------------------|--------------------------|------------|
| DOMAIN | 1 | Storefront Domain | https://localhost:44328/ | |

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:

The screenshot shows the Dynamics 365 Business Central interface. At the top, there's a navigation bar with tabs like 'Storefront Master Setups', 'Storefront Setup', 'Products', 'Customers', etc. Below the navigation bar, there's a large central area with various metrics and links. A prominent orange arrow points from the text 'Want to learn more about Business Central?' to the 'Storefront Setup' tab in the navigation bar. Another orange arrow points from the 'Activities' section (which includes 'SALES QUOTES - OPEN' and 'SALES ORDERS - OPEN' counts) to the 'Fulfilment Locations' tab in the navigation bar. On the right side, there's a 'Settings' dialog box open, showing 'Edit - My Settings'. It lists 'Role' as 'Storefront by Braintree', 'Company' as 'braintree', 'Work Date' as '2020/06/01', 'Region' as 'English (South Africa)', 'Language' as 'English (South Africa)', 'Time Zone' as '(UTC+02:00) Harare, Pretoria', and 'Notifications' as 'Change when I receive notifications.' There are 'OK' and 'Cancel' buttons at the bottom of the dialog box.

Select Storefront Setup, then Fulfilment Locations to edit locations:

Dynamics 365 Business Central

Braintree Demo | Storefront Setup | Products | Customers |

Fulfillment Locations: All | Search | New | Manage | Page

| Code # | Name | Name 2 | Address 1 | Address 2 | City | County | Post Code | Country/Region Code | Contact | Phone No. | Email |
|--------|----------------|--------|--------------------------|--------------------|---------|--------|-----------|---------------------|------------------|--------------------|-------|
| EAST | East Warehouse | | Great Eastern Street, 80 | | 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:

Dynamics 365 Business Central

CUSTOMERS

Reminder: your work date is 2020/05/21 Use today | Change to... | Turn off reminder

Search + New Manage Process Report New Document Customer Navigate Page Actions **Ship-to Addresses** Report SmartList Fewer options

Customer History Sales Documents

Comments Dimensions Bank Accounts Direct Debit Mandates Ship-to Addresses Contact Cross References Approvals

| Corporation | Region | Country | Customer Name | Open Sales | Open Credit | Total Sales | Total Credit |
|--------------------|--------|---------|---------------|------------|-------------|-------------|--------------|
| Adatum Corporation | EAST | 456 | Robert Townes | 46 595.35 | 0.00 | 182 363.47 | 177 87 |
| Fine Art | MAIN | | Helen Ray | 2 345.63 | 2 345.63 | 38 066.60 | 45 23 |
| by Vox | | | Meagan Bond | 32 644.30 | 32 644.30 | 144 894.60 | 112 25 |
| | | | Ian Deberry | 2 617.50 | 2 617.50 | 46 357.80 | 42 92 |
| | | | Jesse Homer | 6 762.38 | 6 762.38 | 54 482.70 | 61 34 |
| | | | | 0.00 | 0.00 | 0.00 | |

Details Attachments (0)

Sell-to Customer Sales History

| Ongoing Sales Quotes | Ongoing Sales Blanket Orders | Ongoing Sales Orders |
|---------------------------|------------------------------|------------------------------|
| 0 | 0 | 8 |
| Ongoing Sales Invoices | Ongoing Sales Return Orders | Ongoing Sales Credit Memos |
| 2 | 1 | 0 |
| Posted Sales Shipments | Posted Sales Invoices | Posted Sales Return Receipts |
| 35 | 35 | 0 |
| Posted Sales Credit Memos | | |
| 0 | | |

Customer Statistics

| | |
|--------------------------|-----------|
| Balance (LCY) | 46 595.35 |
| SALES | |
| Outstanding Orders (LCY) | 65 232.25 |

Edit the customer's Ship-to Addresses:

10000 · ADATUM CORPORATION

Ship-to Address List Search + New **Manage** Page More options

Edit View Delete **Edit** **View** **Delete**

| Address | Customer | City |
|------------|--------------------|------------|
| CHELTENHAM | Adatum Corporation | Cheltenham |
| LONDON | Adatum Corporation | London |
| LONDOD | Adatum Corporation | Wien |

10.7 Add a Shipping Provider & Charge

Change your role to Storefront:

The screenshot shows the Dynamics 365 Business Central interface. At the top, there's a navigation bar with links like 'Storefront Master Setups', 'Storefront Setup', 'Products', 'Customers', 'Identities', 'Currencies', 'Payment Methods', 'Post Codes', 'Shipping Agents', and 'Shipping Agents Services'. A central message box says 'Want to learn more about Business Central?' with an orange arrow pointing to it. Below this are sections for 'Activities' (Sales Quotes and Sales Orders) and 'Insights' (Sales Orders Released Not Shipped). On the right, a 'Settings' ribbon is open, showing 'Dynamics 365 Business Central' with options like 'Personalize', 'My Settings' (highlighted with an orange arrow), 'Company information', 'Assisted setup', 'Advanced settings', and 'Admin Center'. Below the ribbon, there's an 'Office 365' section.

Search & navigate to Sales & Receivables Setup.

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

The screenshot shows the 'Sales & Receivables Setup' page. At the top, there's a breadcrumb trail '...ABLES SETUP | WORK DATE: 1/27/2022' and a save button with a checkmark and the word 'SAVED'. Below the title, there are tabs for 'Customer Groups', 'Payments', and 'More options'. The main area has several expandable sections: 'General', 'Dimensions', 'Number Series', 'Background Posting', 'Archiving', and 'Dynamics 365 Sales'. In the 'Dynamics 365 Sales' section, there are dropdown menus for 'Write-in Product Type' (set to 'Item'), 'Freight G/L Account ...' (set to '6410'), and 'Write-in Product No.' (with a 'Look up value' button). There are also icons for creating new entries (+) and deleting them (-).

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

| 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

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 | |

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.