

# 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

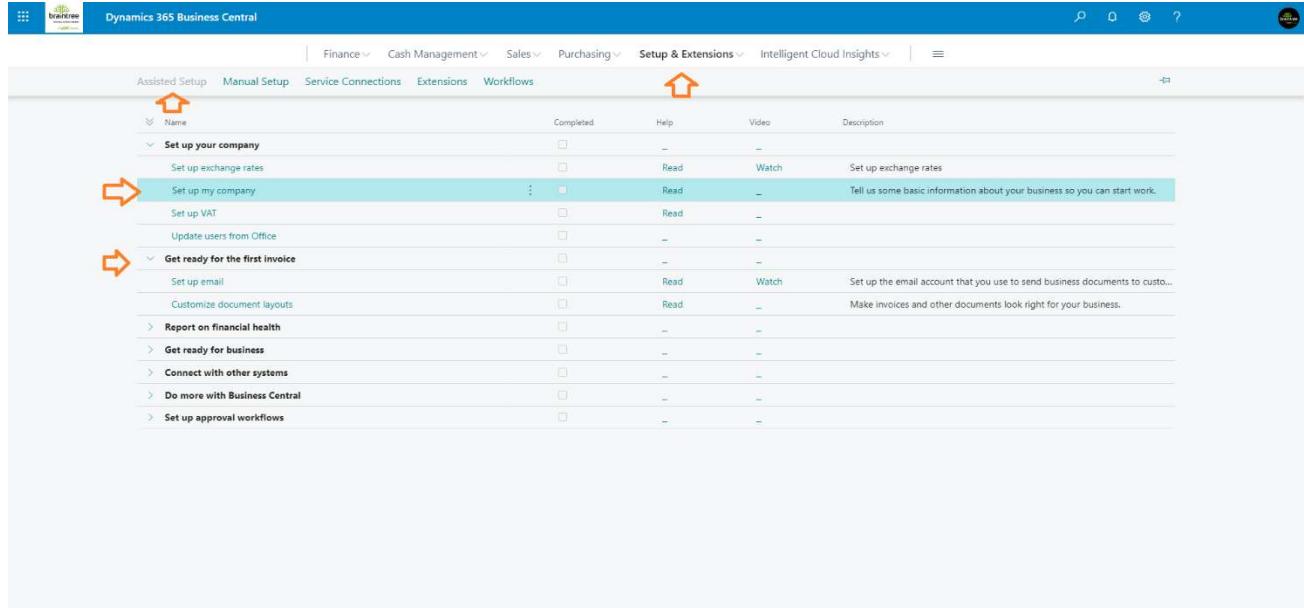
Change your user profile's Role. Start by using the BUSINESS MANAGER or SALES ORDER PROCESSING Role.

The screenshot shows the Dynamics 365 Business Central home page. On the left, there is a headline 'Good morning' and a section for 'Activities' showing 'SALES THIS MONTH' (0), 'OVERDUE SALES INVOICE AMOUNT' (44 370), and 'OVERDUE PURCH. INV. AMOUNT' (36 432). On the right, there is a 'Settings' menu with options like 'Personalize', 'Company information', 'Assisted setup', and 'Advanced settings'. A red arrow points to the 'Business Manager' role selection in the 'Edit - My Settings' dialog, which also includes fields for Company, Work Date, Region, Language, Time Zone, and Notifications. Another red arrow points to the 'Setup' link in the settings menu.

## 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
<b>Set up my company</b>	<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"/>	—	—	
<b>Get ready for the first invoice</b>	<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"/>	—	—	

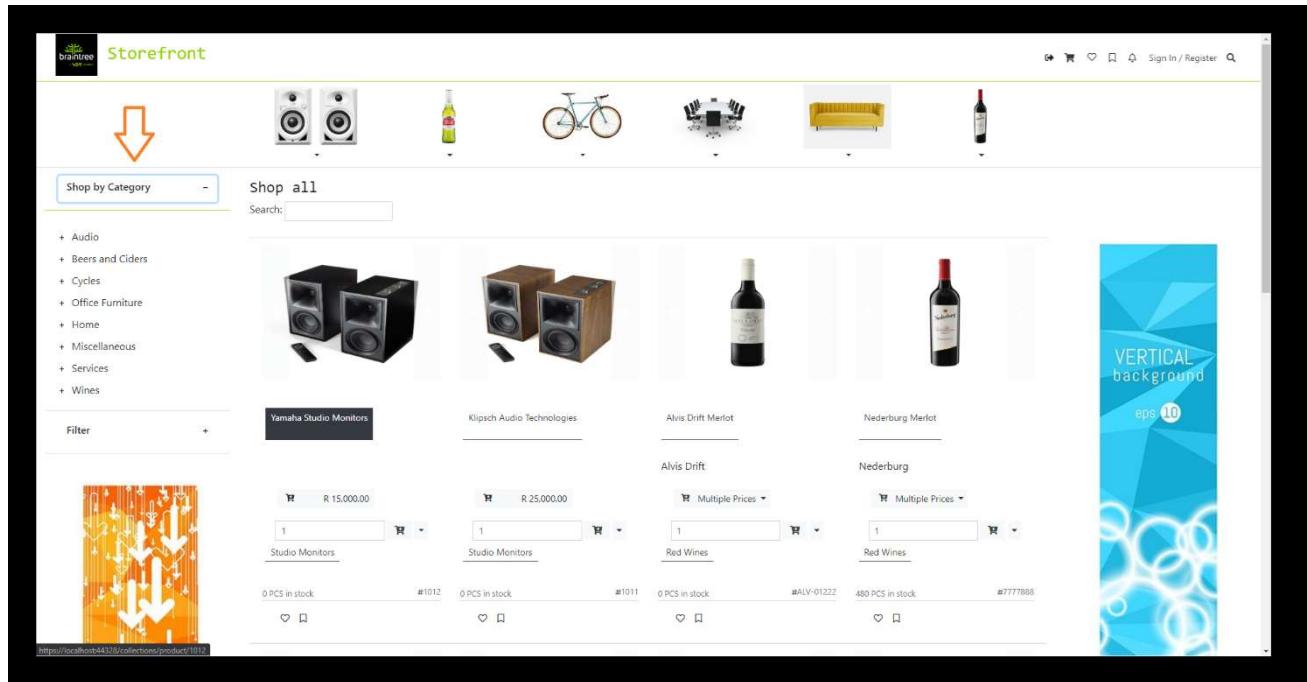
Also consider setting up email and tailoring document layout under [Get ready for the first invoice](#). You can always come back to this step.

### 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

A screenshot of a search interface. It features a search bar with the placeholder "Item cat". Below the search bar are two buttons: "Go to Pages and Tasks" and "Show all (6)". At the bottom, there's a navigation bar with a back arrow, the text "> Item Categories", and a "Administration" link.

Dynamics 365 Business Central

ITEM CATEGORIES

Code

		Parent	Description
	<b>AUDIO</b>		Audio
	FLOOR STANDING	Audio	Floor Standing Speakers
	MONITORS	Audio	Audio
	<b>CYCLES</b>		Cycles
	<b>MTB</b>	Cycles	Mountain Bikles
	MTB-SHIRTS	MTB	Shirts
	MTB-SHORTS	MTB	Shorts
	<b>ROAD</b>	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

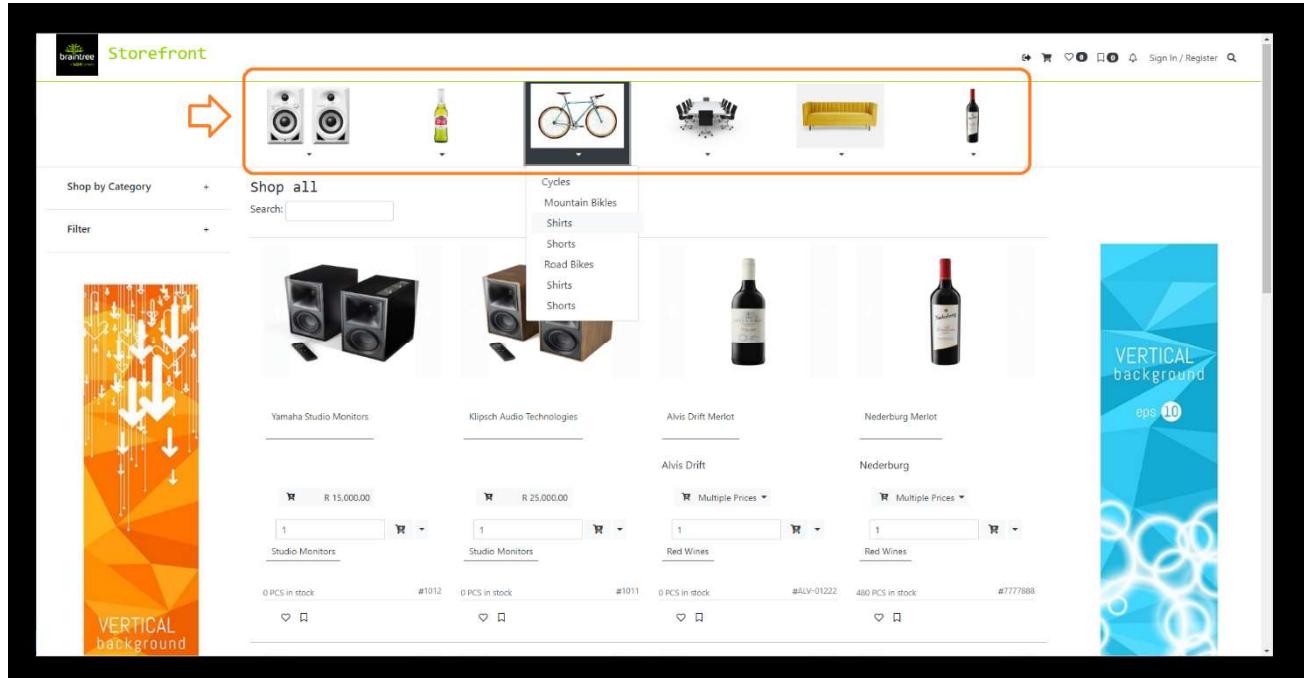
Klipsch Audio Technologies Studio Monitors

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, "ATTRIBUTES", has a value of "Filter Attributes" with a code value of "8|9|11". The second row, "DOMAIN", has a value of "Storefront Domain" with a code value of "https://localhost:44328/". The third row, "PROMO" (with an orange arrow pointing to it), has a value of "Promoted Categories Filter" with a code value of "AUDIO,BEERS AND CIDERS,CYCLES,FURNITURE,WINES,HOME" (with another orange arrow pointing to it).

P Key ↑	Line No. ↑	Metric	Text Value	Code Value
ATTRIBUTES	:	1	Filter Attributes	8 9 11
DOMAIN	1	Storefront Domain	https://localhost:44328/	
PROMO	1	Promoted Categories Filter	AUDIO,BEERS AND CIDERS,CYCLES,FURNITURE,WINES,HOME	

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 are filter options for 'P Key' and a 'Reset filters' button. The overall layout is clean and professional, typical of a business intelligence application.

## 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. At the top, there's a notification: "Notifications 2 You can get the sales prediction for last month." Below this, there's a search bar and a "New" button.

The main area is titled "SELECT A TEMPLATE FOR A NEW ITEM" and shows a list of templates:

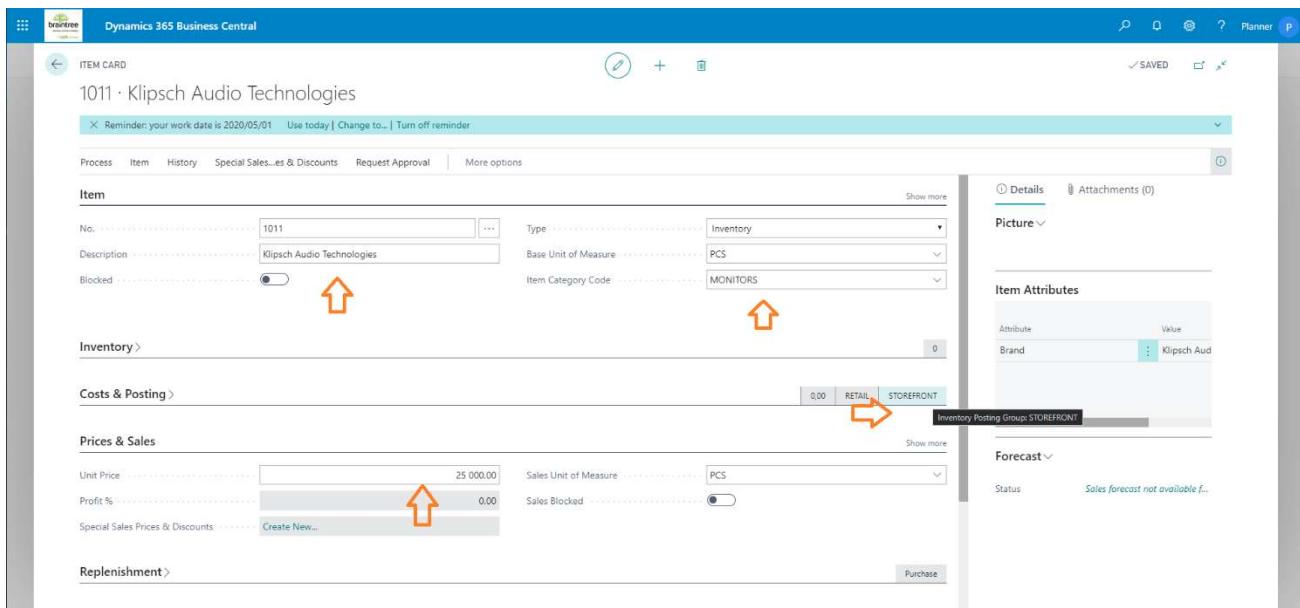
- Description
- Item Zero VAT
- Miscellaneous
- Storefront - Auto No. Series
- Storefront - Manual No. Series

On the right side, there are two panes: "Details - Invoicing" and "Item Details - Planning". The "Details - Invoicing" pane shows the following fields:

Method	FIFO
Adjusted	Yes
Allocated to G/L	Yes
Cost	0.00
Overhead Rate	0.00
Indirect Cost %	0
Last Direct Cost	10.41667
Profit %	13.19442
Unit Price	15.00

The "Item Details - Planning" pane shows:

Item No.	1001
Reordering Policy	
Reorder Point	0
Reorder Quantity	0
Maximum Inventory	0
Overflow Level	0
Time Bucket	
Lot Accumulation Period	
Rescheduling Period	



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**

Code	Package Name	Language ID	Product Version	Processing Order	Exclude Config. Tables	No. of Tables	No. of Records	No. of Errors
STOREFRONT HIDE CATS	Hide Categories	0	W110.0	0	<input type="checkbox"/>	1	0	0
STOREFRONT ATTRIBUTE	Storefront Item Attributes	0	W110.0	0	<input type="checkbox"/>	12	1	1
STOREFRONT BASKET	Basket Offers	0	W110.0	0	<input type="checkbox"/>	12	42	42
STOREFRONT CATEGORY	Items and Item Categories	0	W110.0	0	<input type="checkbox"/>	12	0	0
STOREFRONT DW CUST	Dental Customer Category	0	W110.0	0	<input type="checkbox"/>	2	0	0
STOREFRONT PIM	Product Information	0	W110.0	0	<input type="checkbox"/>	11	0	0
<b>STOREFRONT PRICES</b>	<b>Storefront Special Prices</b>	0	W110.0	0	<input checked="" type="checkbox"/>	1	0	0
STOREFRONT REL-ITEM	Related Items	0	W110.0	0	<input checked="" type="checkbox"/>	1	0	0
STOREFRONT USER	Storefront Users	0	W110.0	0	<input type="checkbox"/>	11	0	0

- 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:

General

Table ID	Table Name	Parent Table ID	Data Template	Skip Tabl...	Delete...	No. of Packag...	No. of Fields Available	No. of Fields Included	No. of Fields to Validate	No. of Package Errors	No. of Database Records	Filt...	Page ID	Comments	Created Date and Time	Created by User ID	Imported D Time
7002	Sales Price	0		<input type="checkbox"/>	<input type="checkbox"/>	0	17	11	8	0	21571	Yes	7002			31/05/2021	

- 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:



StorefrontSpecialPric  
es Import Template.xls

To import, create & update products in bulk, contact us at [braintree.support@voxtelcom.co.za](mailto:braintree.support@voxtelcom.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. The main area features a large orange arrow pointing to the 'Customers' link in the top navigation. Below the arrow, a section titled 'INSIGHT FROM LAST MONTH' displays the best-selling item as 'SYDNEY Swivel Chair, bright ...' with 8 units sold. To the right of this, there are 'ACTIONS' buttons for creating quotes, orders, and invoices, and for viewing payments and reports. Below this, there are four summary 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' (2 sales quotes, 15 sales orders, 7 sales invoices) and 'ONGOING PURCHASES' (5 purchase orders, 3 ongoing purchase invoices, 13 purchase invoices next week). There are also sections for 'APPROVALS' (0 requests to approve), 'PAYMENTS' (1 unprocessed payment, average collection days 0,0), and 'OUTSTANDING INVOICES' (13 outstanding invoices). On the right side, there's a 'CAMERA' button with a note '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](mailto: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.

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 two sales orders: No. 101001 and 101002. Order 101001 is for customer Adatum Corporation with status 'Awaiting Pickup'. Order 101002 is also for Adatum Corporation with status 'Shipped'. To the right of the grid, there are 'Details' and 'Attachments (0)' buttons. A large orange arrow points from the 'Print/Send' button in the menu bar down to the 'Print Confirmation...' button in the toolbar above the grid.

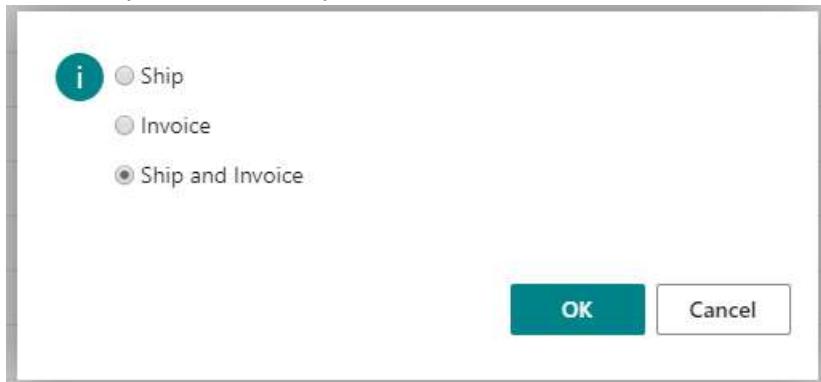
## 7.2 Process an Order

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

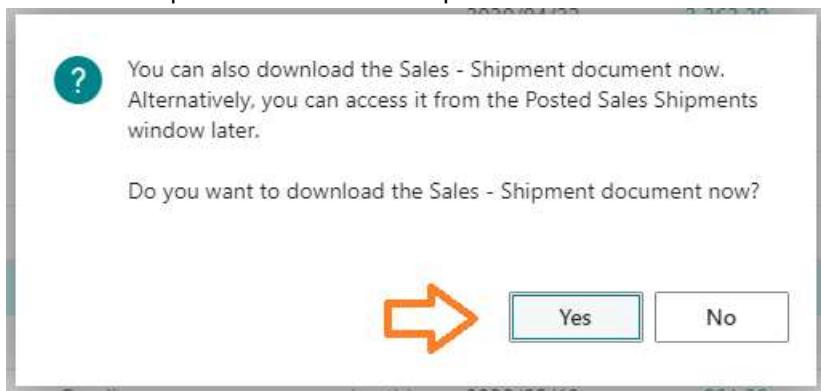
This screenshot shows the same Dynamics 365 Business Central Sales Orders screen as the previous one, but with different menu highlights. The 'Posting' option in the top menu bar is highlighted with an orange arrow. The main menu bar also includes 'Post...', 'Post and Send...', 'Post Batch...', and 'Preview Posting'. The toolbar above the grid includes 'Print/Send' and 'Print Confirmation...'. The grid content is identical to the first screenshot, showing two sales orders for Adatum Corporation. The right sidebar with 'Details' and 'Attachments (0)' is also present.

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	
						<b>Total \$</b>
						<b>11 640,24</b>

**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

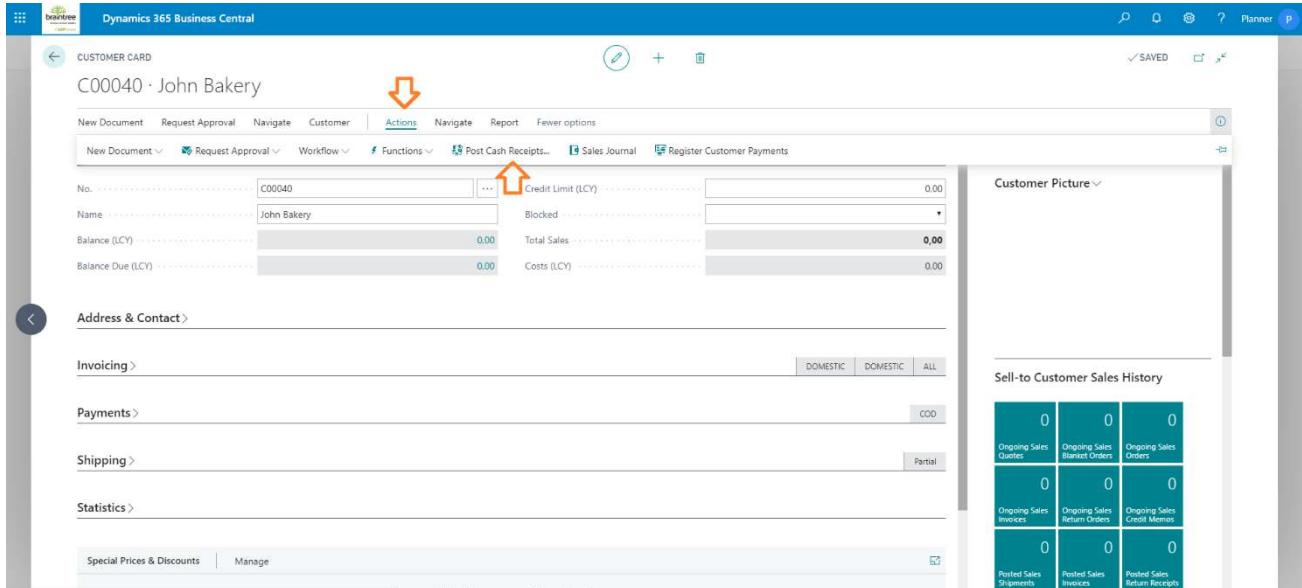
No.	Description	Quantity	Unit of Measure
2000-5	SYDNEY Swivel Chair, green Freight Amount Deliver after 5pm pls.	5	Piece
		1	

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

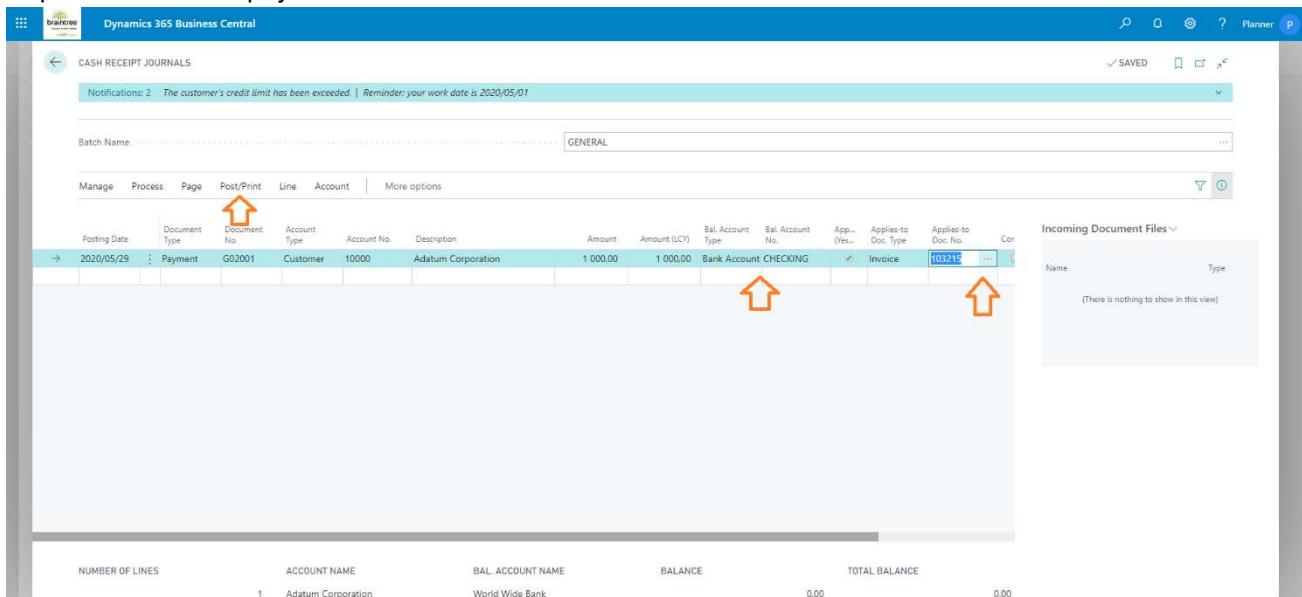
A built-in Microsoft Word report designer is available to change report & document layouts.

## 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:

CASH RECEIPT JOURNALS

NOTIFICATIONS: 2 The customer's credit limit has been exceeded.

GENERAL

Posting Date	Document Type	Document No.	Customer No.	Description	Currency Code	Remaining Amount
2020/05/01	Payment	G02001			1 000.00	1 000.00
2020/05/07	Invoice	103216	10000	Order 101011	USD	11 640.24
2020/05/21	Invoice	103215	10000	Order 101017	USD	39 042.88

APPLN. CURRENCY AMOUNT TO A... PMT. DISC. AM... ROUNDING APPLIED AMO... AVAILABLE A... BALANCE

39 042.88	0.00	0.00	39 042.88	1 000.00	40 042.88
-----------	------	------	-----------	----------	-----------

OK Cancel

NUMBER OF LINES ACCOUNT NAME BAL. ACCOUNT NAME BALANCE TOTAL BALANCE

0 Adatum Corporation World Wide Bank 0.00 0.00

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

CASH RECEIPT JOURNALS

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

GENERAL

Posting Date	Type	Document No.	Customer	Amount	Amount (LCY)	Bank Account	Input (Yes/No)	Doc. Type	Doc. No.	Cor. Name	Cor. Type
2020/05/29	Payment	G02001	Adatum Corporation	1 000.00	1 000.00	Bank Account CHECKING	<input checked="" type="checkbox"/>	Invoice	103215		

OK Cancel

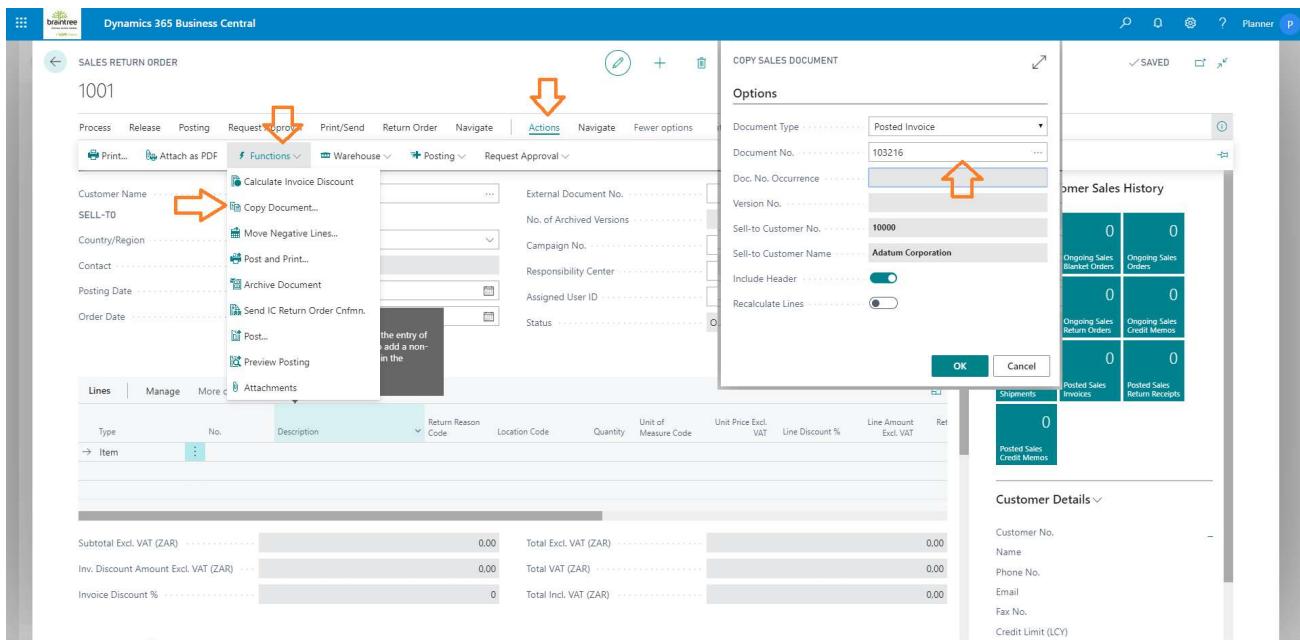
Tip: Use Preview Posting to review posting first.

## 7.4 Process a Return

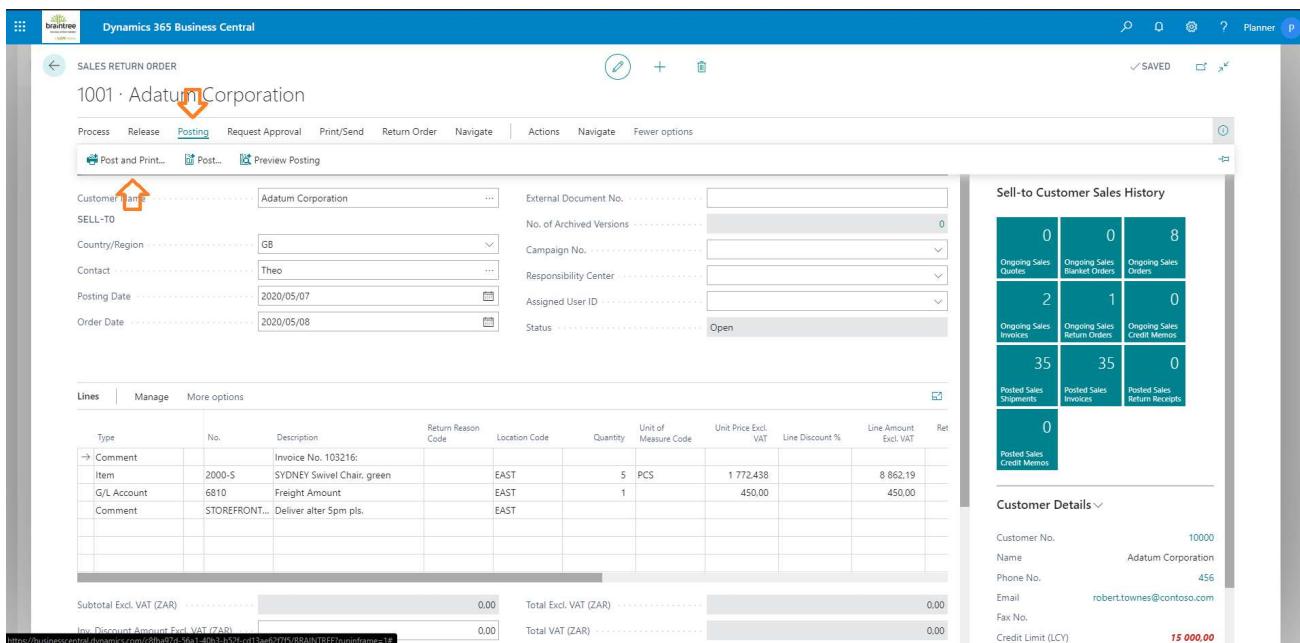
Search & navigate to Sales Return Orders.

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: 

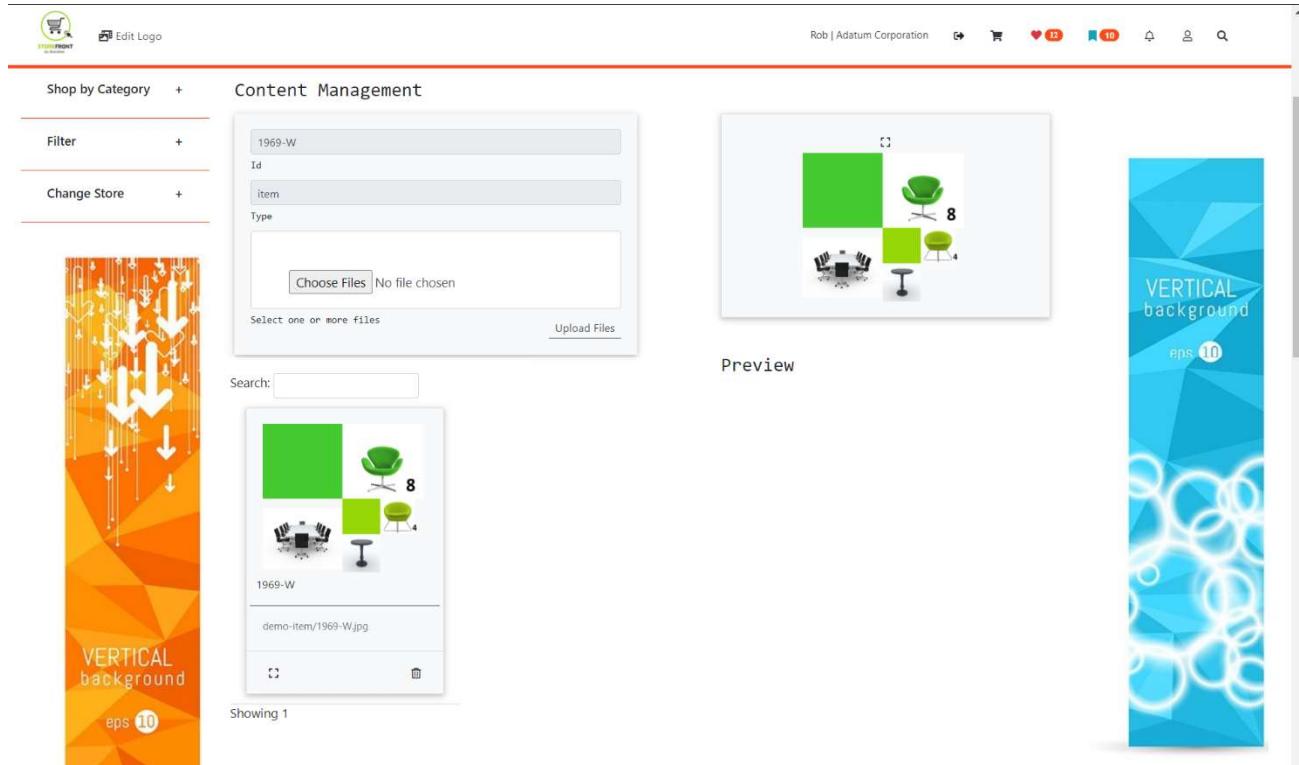
The following content can be edited:

- 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.



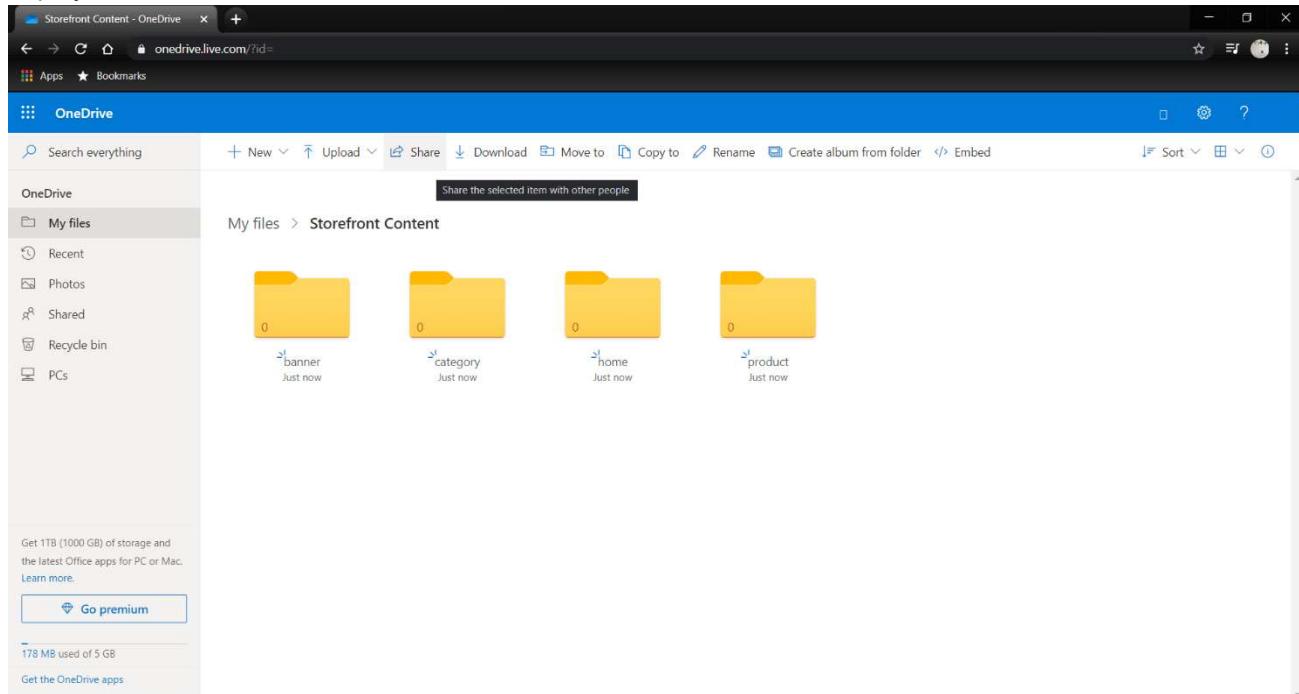
The screenshot shows the Content Management page. On the left, there's a sidebar with 'Shop by Category' and 'Content Management' sections, and a large orange background image labeled 'VERTICAL background eps 10'. In the center, there's a search bar and a file upload form with fields for 'Id' (containing '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, 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](mailto: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 links like 'Storefront Master Setups', 'Storefront Setup', 'Products', 'Customers', etc. Below the navigation is a search bar and a 'Settings' button. The main content area has a large message 'Want to learn more about Business Central?'. Below it is a 'Activities' section with two boxes: 'SALES QUOTES - OPEN' (0) and 'SALES ORDERS - OPEN' (0). Further down are sections for 'SALES ORDERS RELEASED NOT SHIPPED', 'RETURNS', and 'MY USER TASKS'. At the bottom, there's an 'Insights' section with a 'My Customers' dropdown and several time sheet buttons: 'OPEN TIME SHEETS', 'SUBMITTED TL... SHEETS', 'REJECTED TIME SHEETS', 'APPROVED TIM... SHEETS', and 'REQUEST APPROVAL'. On the right side of the screen, a 'Settings' dialog box is open under the 'Edit - My Settings' tab. It shows the current role as 'Storefront by Braintree'. Other settings include Company (Braintree), Work Date (2020/06/01), Region (English (South Africa)), Language (English (South Africa)), Time Zone (UTC+02:00 Harare, Pretoria), and Notifications (Change when I receive notifications). A note at the bottom says 'Your last sign in was on 20/06/01 12:56 PM.' At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

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	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**

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](mailto:info@braintree.co.za).