Tradebox Finance Manager Overview

Online Sales ⟷ **TRADEBOX** ⟷ **sage**

Marketplace Integration → Order Management → Products & Stock Control → Reporting & Analysis → Financials & VAT

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CONTROL AT A CLICK

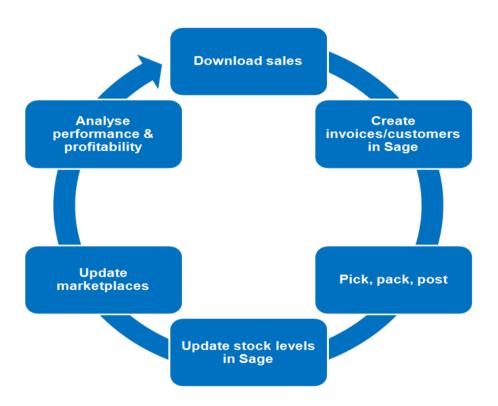**Sage Certified Solution**
Sage 50 Accounts

Sage Certified Solution
Sage Instant Accounts

Overview

Tradebox Finance Manager is a **Sage Certified** desktop application, designed to integrate online marketplaces with **Sage 50 Accounts** and provide retailers with the ability to effectively **Manage**, **Control** and **Account** for their online sales. Designed as middleware, Finance Manager provides a bridge between online marketplaces and Sage 50 Accounts through the creation of **individual connections** in the software, enabling sales data to be rapidly downloaded, automatically entered into Sage and stock levels from Sage to be passed back to the marketplace.   **Watch the video.**

Tradebox utilises the **full power of Sage Accounts** by rapidly creating individual invoices in Sage for each online order. Linking these invoices to stock in Sage, provides the user with the unique position of having effective **order management** and **stock control**, whilst reaping the significant benefits of also automatically **accounting for each sale**, calculating **VAT** and providing **in-depth analysis** and reporting on the **performance** and **health of the business**.

Tradebox is a subscription service which includes support and assistance from a knowledgeable and experienced **UK based team** of ex Sage employees who intimately understand Sage Accounts and the requirements of the UK online retailer.

Marketplace Integration

Connections to individual marketplaces are created in Tradebox Finance Manager through an easy to use interactive step through wizard. The wizard guides the user through a series of pages, prompting for information on:

- The marketplace to connect with
- Download criteria
- Which Sage Company to link with
- Customer creation in Sage
- Invoice/Order creation in Sage
- Sales Receipt/Bank information in Sage
- Synchronisation method
- Currency of sales

Upon completion of the wizard a 'connection' is created in Tradebox Finance Manager which holds all of the configuration settings for this particular link. This can be amended or fine tuned at any time. Each connection contains all of the mapping data for customers, products, shipping and payment types which form the relationship between the online data and the corresponding entries in Sage Accounts.

An 'out-of-the-box' solution, Tradebox Finance Manager can be rapidly installed and configured to integrate and download sales from:

- **eBay, Amazon, Rakuten**
- **Magento, Bigcommerce, ekmPowershop, Shopify, Opencart**
- **Visualsoft, Zencart, Romancart, LiquidShop, Shopcreator**
- **Linnworks, ChannelAdvisor, Storefeeeder, PayPal**
- **Any other** platform capable of exporting orders in a compatible csv file.

Comprehensive integration guides for each online marketplace are available within the **Help Menu** of the software detailing the step-by-step instructions required to rapidly download, install and configure Tradebox to download the user's online sales.

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Features

- Create connections to multiple online marketplaces

- Rapidly download completed sales

- Create comprehensive invoices in Sage for each individual online order

- Calculate VAT liability automatically based on products and shipping destination

- Create and print invoices, picking & packing lists and dispatch notes

- Create customers in Sage for each buyer or utilise a generic customer for each connection/marketplace.

- Keep track of what has been picked, packed and shipped

- Mark orders as dispatched on marketplace*

- Map online SKU to Sage Product Records

- Update and adjust stock levels in Sage

- Upload Sage stock levels to marketplace*

- Auto create Purchase Orders for designated 'dropship' items

- Connect online 'packaged' products to BOM's in Sage

- Keep track of low running stock and supplier orders

- Connect different marketplaces to individual Sage banks for easier reconciliation

- Download marketplace fees into Sage

- Analyse products, marketplaces and company turnover, purchases and profitability

* Not all marketplaces/websites have dispatch and upload abilities.

System Requirements & Information

- Sage 50 Accounts, **v2009 onwards** (also works with Sage Instant Accounts from V2009 onwards)
- Windows XP, Windows Vista, Windows 7, Windows 8, Windows 10.

Assessment

Finance Manager is available to assess on a 14 day fully supported free trial available for **existing** Sage users. The software can be downloaded from the Tradebox website

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Tradebox Pricing

Tradebox Finance Manager is based upon subscription to a recurring licence fee. A variety of subscription plans are available for Tradebox Finance Manager, based upon the number of online marketplaces / websites the user wishes to connect with* and the duration of the plan required, as follows:

23% savings on annual licences

Plan	No of Channels	12 Month Licence	3 Month Licence
Plan 1	1	**£480** TB_001_12	**£156** TB_001_03
Plan 2	5	**£600** TB_005_12	**£195** TB_005_03
Plan 3	10	**£840** TB_010_12	**£273** TB_010_03
Plan 4	Unlimited	**£1,200** TB_UNL_12	**£390** TB_UNL_03

Above prices exclude and are subject to VAT

* Multiple connections to a single marketplace/website may be required in the software depending upon currencies, platform rules and how the user wishes to configure the import of data into Sage.

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Tradebox Support

Technical support is available to all users via the Tradebox helpdesk on all working days between **9am to 12pm** and again between **1pm to 5pm**. Help can also be accessed via the Tradebox support portal at https://tradebox.zendesk.com/home.

Technical support does **NOT** include installation, set up, configuration or training. Videos and Guides explaining how to install, configure and use the software can be found under the Videos & Guides section on the **Marketplace** section of the Tradebox site. Sage setup videos are also available here.

Tradebox Finance Manager is delivered electronically via software download. All licences commence upon entering a full serial number and activation key, or within 30 days of purchase, whichever is the earliest. Licences can be upgraded mid-term but cannot be downgraded until the end of the term of the licence. Please see our full terms & conditions, prior to purchase.

Support:	0191 257 4707
Email Support:	support@tradebox.uk.com
Support Portal:	https://tradebox.zendesk.com/home

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