

Magento Integration Guide



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Magento Integration Overview

Tradebox imports sales from Magento via the **Magento API**, which needs to be created, by the user, within the Magento control panel. Tradebox integration with Magento enables users to:

- > Rapidly download orders, either routinely or on demand, based on order status
- > Create customers and invoices in Sage
- Update stock levels in Sage (if required)
- > Upload Sage free stock levels directly to the Magento inventory
- > Accurately calculate VAT liability for all sales, including overseas sales.

Tradebox can <u>only import sales with a single currency</u>, which is established in the connection settings in the Tradebox software. If you have multiple currency sales you will need to create a separate connection in Tradebox to Magento for each currency.

Each individual order downloaded from Magento is cross referenced against the existing sales data in the Tradebox database to ensure duplication cannot occur in Sage. Individual invoices/orders are created in Sage Accounts for each order downloaded, containing comprehensive transaction and buyer details. Tradebox can be configured to create:

- Service Invoices (no stock control)
- Product Invoices (stock control)
- Sales Orders (stock control)

The user has the option to create and use a **single generic customer account** in Sage to report all Magento sales to, or alternatively, create **individual customer accounts** in Sage for each unique buyer.

Sequence of setting up

- 1. Configure Sage Accounts for Tradebox
- 2. Create API connection in Magento
- 3. Download and Install Tradebox
- 4. Create a Magento connection in Tradebox
- 5. Refine Magento connection settings
- 6. Optimise Tradebox and Sage reporting
- 7. Synchronise and download sales



Sage Accounts set up

- Install and configure Sage Instant or Sage 50 Accounts on your pc. Finance Manager is compatible with Sage Instant Accounts version 15 onwards and Sage 50 Accounts version 12 onwards.
- IMPORTANT: If you use <u>Sage 50 Accounts 2008</u>, you MUST download and install the <u>Sage SDO Hotfix</u> prior to using Tradebox
- Enable Sage Accounts to connect to a third party application. This can be achieved within Sage Accounts by clicking on Tools – Activation – Enable 3rd Party Integration. This will take you to a screen with a full set of instructions of how to gain the required enable keys from Sage.
- Create a Sage Username specifically for Tradebox, to prevent logon issues. This does not require a multi user Sage licence as the username Tradebox utilises does not count against your Sage user allocation. This can be done in Sage by selecting Settings – Access Rights.
- 5. If you wish to gain stock control establish Product Records in Sage. An overview of how to do this is available by clicking <u>here</u>.

Action	Verify
Compatible version of Sage installed and registered	
3rd party integration activated in Sage Accounts*	
Set up Sage user specifically for Tradebox**	
Nominal codes created for sales	
Nominal codes created for expenses/fees	
Departments created, if required	
Generic customer accounts created, if required	
Bank Accounts set up, as required	
Suppliers created, as required	
Products created, if required	
Stock levels adjusted against existing products, if required	

Sage 50 Accounts

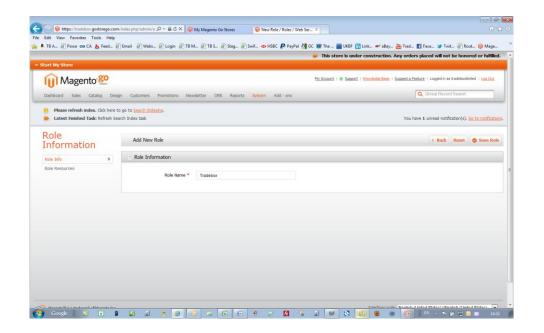


Creating an API connection in Magento

 To set up the Magento API login to the Magento Admin Panel and navigate to System – Web Services – SOAP/XML-RPC - Roles.

Dashbo	ard	Sales	Catalog	Mobile	Customers	Promotions	Newsletter	CMS	Reports	System		
D Latest	Message:	Imagine 2	013 Registra	tion is Now O	pen! <u>Read detail</u>					My Account		
💡 You ha	ve suspe	nded subs	criptions! C	lick <u>here</u> to s	ee more.					Notifications		
										Tools		4
🥥 Mana	age Pro	ducts								Web Services		
										Design		RPC - Users
Page 🔄	1	of 1 page	s View	20 💌 p	er page Tota	17 records foun	d Notify Lo	W Stock R	<u>SS</u>	Import/Export		
Select All	Unseid	ct All S	elect Visible	Unselect	Visible 0 item:	s selected				Manage Curren		
	ID	ţ.	Name						Туре	Transactional E		
Any 💌	From:									Custom Variable		th Consumers
Yary [*										Permissions		th Authorized
AUT T	To:										Tokens	
	To:									Magento Conne		
	To:	19	Test Proc	luct					Simple		REST - My /	
0	То: [15			50 edition) - unlii	mited connection	s - 3 month licer	ce	Simple	Magento Conne Cache Managem Index Manageme	REST - My /	Apps
	То:				50 edition) - unlii	mited connection	s - 3 month licer	ce		Magento Conne Cache Managem	REST - My /	
	То: [18	Tradebox	FM (Sage 5		mited connection			Downl	Magento Conne Cache Managem Index Manageme	REST - My / rent	Apps

2. Select Add New Role and give the role a description, i.e. **Tradebox** and then select **Save Role.**





3. Select the **Role Resources** option to manage which permissions are available to users in this role. Tradebox recommend selecting **ALL**. Then select **Save Role**.

				This store is under o	onstruction. Any orders placed will not be honored	or fulfille
art My Store						
间 Magento 💯				My Account 💿 Support Br	confedor: Base Suppost a Feature Logged in as tradeboximited	I Lea Quit
Dashboard Sales Catalog Desi	an Custorners Promotic	ns Newsletter CMS R	eports System Add - ons		Q Global Record Search	
 Please refresh index. Click here t Latest Finished Task: Refresh Se The role has been saved. 					You have 1 unread notification(s). <u>So t</u>	<u>o notificati</u>
Role Information	Edit Role 'Tradebo	ć			< Back Reset X Delete Role	Save Rol
Role Info	Roles Resources					
Role Resources	Resource Access	All				

 From the System Menu, select Web Services and SOAP/XML-RPC - Users and then select Add New

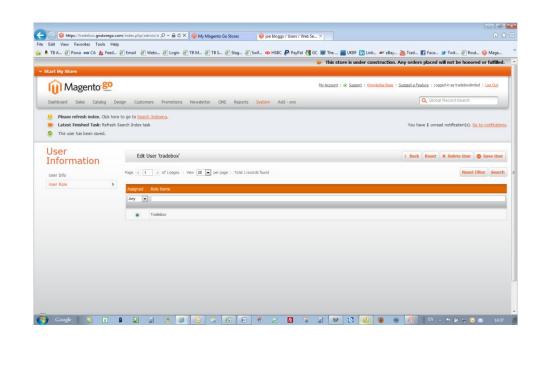
Dashboard	Sales	Catalog	Mobile	Customers	Promotions	Newsletter	CMS	Reports	System		
Latest Messa	ige: Imagine	2013 Registra	ation is Now (Open! Read details	1				My Account		
You have su	spended sul	bscriptions! (Click <u>here</u> to s	ee more.					Notifications		
									Tools		6
Roles									Web Services		
									Design		RPC - Users
age 🔄 1	of 1 pa	ges View	20 💌 🕫	er page Total	1 records found				Import/Export		RPC - Roles
ID † Role M	lame								Manage Curren		
									Transactional E		
1 tradeb	юх								Custom Variable		th Consumers
									Permissions	REST - OAu Tokens	uth Authorized
									Magento Conne	REST - My /	Apps
									Cache Managem		
									Index Manageme		
									Manage Stores	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
									Order Statuses		
									Configuration		



5. The form generated asks for a User Name, First Name, Last Name, Email and API Key. Whilst all fields are mandatory, only the User Name and API Key need to be secure and will be used by Tradebox. The API Key is simply a password of the users choosing. Upon completion select Save User.

(→) () https://tradebox.gostorego.com/index.php/admin/a P - A C × ()	My Magento Go Stores	/Web Ser	
File Edit View Favorites Tools Help			
🐅 🕭 TB A 🗿 Powa 😋 CA 👍 Feed 🕘 Email 🕘 Webs 🕘 Login 创 TB M	🧃 TB S 🧃 Stag 🧃 Swif 👁 HSBC 🧬 PayPa	yPal 🛃 GC 🍿 The 📕 UKBF 🛅 Link 🐠 eBay 🕌 Trad 🛐 Face 🎐 Twit 🕖 Rout 🍿 Mage	~
✓ Start My Store		This store is under construction. Any orders placed will not be honored or fulfilled.	Ĥ
Magento 💯		Mr.Account @ Support Knomledior.Same Suppertial Feature Logged in as tradeboolmited Log Out	
Dashboard Sales Catalog Design Customers Promotions New	sletter CMS Reports System Add - ons	Q Global Record Search	
Please refresh index. Click here to go to <u>Search Indexing</u> . Latest Finished Task: Refresh Search Index task		You have 1 unread notification(s). <u>So to notifications</u> .	
User Information		C Back Reset Save User	
User Info Account Information			
User Role User Name *	tradebox joe		
Last Name *	bloggs		
Email *	support@tradebox.uk.com		
API Key *	•••••		
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This account is	Active		
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 Select the User Role link from the left hand menu. Select a Role from the list to assign the User to the Role. Then select Save User. The API connection is now set up.



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Sage 50 Accounts



Installing Tradebox Finance Manager

Tradebox Finance Manager can be downloaded from the <u>Tradebox website</u> by clicking on the **Download** button at the top of the web page.

FEATURES	MARKETPLACES	PRICING	SUPPORT	MY ACCOUNT	DOWNLOAD)
	FEATURES	FEATURES MARKETPLACES	FEATURES MARKETPLACES PRICING	FEATURES MARKETPLACES PRICING SUPPORT	FEATURES MARKETPLACES PRICING SUPPORT MY ACCOUNT	FEATURES MARKETPLACES PRICING SUPPORT MY ACCOUNT DOWNLOAD

This will generate the download page:

	Download Tradebox			
	Whether you wish to evaluate Tradebox for the first time, install on a new PC or simply upgrade your existing version, fill out the form and we will email you the instructions.			
First Name: *	Edwar			
Last Name: *				
Company: *				
Email Address: *				

Simply fill out the form and select **Download** button at the bottom of the form. Tradebox will send you an automated email (to the email provided in the form) with a full set of download and installation instructions.



Creating and configuring a Magento connection in Tradebox

- 1. In Finance Manager, select **New Sales Channel** from the **Configuration** menu, select **Magento** from the drop down menu and click on **OK**.
- This will display the Sales Channel Setup Wizard which is designed to guide the user through all of the configuration settings. The first screen is the Introduction page. Select Next.
- 3. The second screen is entitled **Magento Account** and enables the user to create a connection to the Magento API and establish the download criteria for Magento sales.
- 4. The Account Name of the connection. This is simply a label and can be called anything the user wishes. Every connection to an online marketplace in Tradebox Finance Manager is given an Account Name. These must be unique.

Channel Setup Wizard			
Introduction	Magento Accou	int	
Magento Account	Setup your Magento ac	count defaults.	
Company Selection	Magento Account Sele	ection	
Account Selection	Enter the name of the	Magento account you want to se	tup below.
Transaction Types	Account Name:	* Tradebox - Magento S	tore
Synchronisation	API Connection Detail	5	
Finish	API URL:	http://websiteURL/AP	N/XMLRPC
	API User Name:	username	
	API Password:	password	
			Test Connection
	Sale Currency		
	Currency:	Pounds Sterling	•
		Post transactions	in this currency
	Download Statuses		
	Statuses:	COMPLETE#PAID	
	Choose Next to contin	ue	
	G	ance <u>l</u> <u>B</u> ack	<u>N</u> ext <u>F</u> inis



- 5. API Connection Details:
 - i. API URL: The Magento website URL followed by /api/xmlrpc/ e.g. http://tradebox.uk.com/api/xmlrpc.
 - ii. API Username: username created in Magento in the user setup process
 - iii. API Password: API Key created in Magento in the user setup process

After entering these details select the '**Test Connection**' button to ensure details are valid.

- 6. **Sales Currency:** Select the currency of the sales you wish to import from Magento. Each connection in Tradebox can only import sales in a single currency.
 - iv. Post transactions to Sage in the imported currency by leaving the check box ticked.
 If you are importing foreign currency transactions and you leave this option ticked you will need Sage 50 Professional which needs to be set up in advance to deal with foreign currencies.

or

- v. Convert foreign currency sales to Pounds Sterling by unticking the check box. If you choose this option Tradebox will convert the foreign currency into Pounds Sterling at the point of import using the latest currency conversion rates from a third party exchange rate service. This will create currency fluctuations which will need to be addressed periodically in Sage using journals to adjust for the exchange rate variance.
- 7. Download Statuses: If this field is left blank, Tradebox will import all sales. If you wish to impose filters on imported sales based upon the status, add them in this field followed by a # symbol, i.e. COMPLETE #PAID
- 8. Click Next.



The third screen in the wizard is entitled **Company Selection** and enables the user to decide which company in Sage they wish to pass their sales into. Tradebox automatically detects where Sage is installed on the user's PC and displays this information in the Sage Folder field.

- From the Company field select the Sage Company you wish to pass your sales data into. Please note that Tradebox enables you to pass data into the Sage Demo and Practice companies.
- Provide an existing Sage username in the logon field for Tradebox to use. Please note that providing Tradebox with the MANAGER username often leads to logon conflicts. Tradebox highly recommends creating an additional user in Sage specifically for Tradebox's use.

Sales Channel Setup Wizard	
Introduction	Company Selection
🗸 Magento Account	Select the Sage company you wish to connect to.
Company Selection	Company and Logon
Account Selection	If you have more than one company dataset in Sage, select a company below:
Transaction Types	Company: * Tradebox Limited -
Synchronisation	Logon
Finish	To enable Tradebox to connect to Sage automatically, enter a valid Sage Logon Name and Password below.
	Logon Name: * tradebox
	Password: *******
	Choose Next to continue
	Cance <u>I</u> Back <u>N</u> ext <u>F</u> inish

11. Click on Next.

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Sage 50 Accounts



The fourth screen in the wizard is entitled **Account Selection** and enables the user to decide how to manage Customer Accounts in Sage and also to establish global nominal settings to report sales and carriage income to.

10. Users can choose to use a single generic customer account in Sage to report all Magento sales to, or, to create individual customer accounts in Sage for every unique buyer. Regardless of this choice, a Generic Default Customer is always required.

- a. To use a single generic customer account in Sage, either select a pre-existing Sage account from the drop down list, or choose the Create Magento Account button for Tradebox to create the Account. Ensure the Auto Generate option is turned to NO.
- b. To create individual customer accounts in Sage you initially still need to select a pre-existing Sage account from the drop down list, or choose the Create Magento Account button. Then ensure the Auto Generate option is turned to YES.

Sage will only accept the following characters as valid to make up the **Sage Customer Account Reference**; 1 2 3 4 5 6 7 8 9 0 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ! " \$ % & () - _ ' # . /. Where invalid characters form the basis of the Sage Account Reference, Tradebox will allocate the Sage invoice to the default customer.

Introduction	Account Selection
Magento Account	Select the Sage accounts you wish to use for data processing.
Company Selection	Customer Account
Account Selection	Select the customer account you want the Magento invoices/orders to be posted to.
Transaction Types	This can either be an existing account or you can create a 'Magento' account by clicking on the button below:
Synchronisation	Customer Account: * WEBSALES - Website Sales 🗸
Finish	Create Magento Account
	Auto Generate: O Yes O No
	Nominal Accounts
	Select the nominal accounts you want the Magento sales and carriage to be posted to:
	Sales Nominal: * 4004 - Web Sales 🗸
	Override Product Nom.: O Yes O No
	Carriage Nominal: * 4905 - Distribution and Carriage 🔻
	Choose Next to continue

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Sage 50 Accounts



- 12. From the Sales Nominal field choose a Sales Nominal Code from Sage to report your Magento Sales to. This is a global setting. If you elect to create Product Invoices or Sales Orders (in the next page of the wizard) Tradebox will, by default, report the sales to the nominal code held within the Sage Product Record. If you wish to override this default and simply report sales income to the single global nominal code select the YES option next to Override Product Nom.
- 13. From the **Carriage Nominal** field choose a Sales Nominal Code from Sage to report your carriage income to. Again, this is a global setting. Different shipping options can be mapped to separate sales nominal codes after the connection has been established.

14. Click on Next.



The fifth screen in the wizard is entitled **Transaction Types** and enables the user to choose what type of transaction they wish to create in Sage Accounts:

- Service Invoice No Stock Control
- Product Invoice Stock Control (Recommended for stock control)
- Sales Order Stock Control (requires Sage 50 Professional)

If you are unsure of the best transaction type to create, please refer to the **online retailer's** guide to Sage Accounts which can be downloaded by clicking <u>here</u>.

Sales Channel Setup Wizard	
✓ Introduction	Transaction Types
🗸 Magento Account	Select the transaction type you wish to use for data processing.
Company Selection Account Selection	The following transaction types can be created in Sage for your completed sales. Select your required transaction type:
Transaction Types	Product Invoice Sales Order <u>A</u> dvanced Options
Synchronisation	Service Invoice
Finish	Product Mapping Basis: SKU
	VAT Calculations
	Select the tax codes you wish to use for VAT calculations:
	Sales: Carriage:
	UK Buyers: T1 - 20.00% 🔻 T1 - 20.00% 🔻
	EU Buyers: T1 - 20.00% 🔻 T1 - 20.00% 🔻
	ROW Buyers: To - 0.00%
	Choose Next to continue
	Cance <u>i</u> Back Next Einish

Where Product Invoices or Sales Orders have been chosen, a **Product Mapping Basis** needs to be selected to enable Tradebox to match the product sold online to a Product in Sage. Using SKU as the mapping basis is recommended. Where SKU is chosen, Tradebox will attempt to automatically match the online SKU to an existing Sage Product Code where both identifiers are identical. If Tradebox cannot find an exact match it will invite the user to manually map the SKU to a Sage Product Code in Error Corrections and will save this relationship for future use in the **Product Mapping** table.



15. The VAT calculations grid enables Tradebox to establish rules on calculating VAT on overseas sales. By default UK and EU sales are set to the Sage T1 tax code and Rest of World Sales (ROW) are set to T0. The tax rates for these codes are picked up directly from Sage.

If the user has chosen to create Product Invoices or Sales Orders, Tradebox will initially read the Tax code from the Sage Product Record and use this as the default for UK and EU sales.

16. Click on Next.



The sixth screen in the wizard is entitled **Synchronisation** and enables the user to choose when to import sales and also how to handle Sales receipts in Sage.

17. The user has 4 Synchronisation options:

- a. Manual every time they select the Synchronise button
- b. Every day at a specified time
- c. Every hour (Tradebox must be closed and re-opened for this setting to take effect.
- d. On loading Tradebox

The synchronisation method is a global setting so will apply to all connections. This option may appear 'greyed out' if another connection already exists. A manual synchronise can always be ran even if an automated option has been chosen.

Sales Channel Setup Wizard	
Introduction	Synchronisation
🗸 Magento Account	Select when you want to synchronise with Magento.
 ✓ Company Selection ✓ Account Selection ✓ Transaction Types Synchronisation Finish 	You can synchronise with Magento as often or as little as you like. Note for the options other than Manual, this program must be running. Manual Every day at: Every hour On loading Tradebox
	Handle Payments As the orders you download from Magento have been paid for, Tradebox can automatically post the payment details to Sage. If you want to do this, select 'Yes' below: Handle Payments:
	Bank Account: 1240 - Credit Cards
	Choose Next to continue
	Cancel Back Next Einish

18. Under the Handle Payments area of the wizard screen, the user can choose whether or not to automatically pay an individual sales receipt into a nominated bank account in Sage. All invoices created by Tradebox in Sage are unposted. If you choose to process

Tradebox Finance Manager V5.5



the sales receipt then this will be automatically paid into a nominated Sage bank account when the invoice is updated/posted to the ledgers.

Where a connection has multiple payment methods (PayPal, Sage Pay, WorldPay etc) these can be allocated to different banks in Sage, so all PayPal sales receipts get created in a PayPal bank in Sage and all WorldPay sales receipts get created in a WorldPay bank in Sage.

Creating 'notional' banks in Sage to reflect and contain activity for a given payment method is a widely used approach by many online retailers. Doing this allows large volumes of individual transactions from a given payment method to be isolated away from the businesses other transactions, assisting in the reconciliation process.

The above is **NOT applicable** if Sales Orders (SO) have been chosen as the transaction type for Tradebox to create.

Sales Orders

If **Sales Orders** (SO) are chosen as the transaction type for Tradebox to create, Sales Receipts (SR) will NOT be paid into a bank, as illustrated above. This is because Sales Orders operate in a different way in Sage, as follows:

- Sales Order is created in Sage by Tradebox automatically creating a Sales Receipt on Account (SA), against the Sage Customer Account. Effectively this credits the Sage Customer Account as a payment taken in advance of an invoice being raised.
- Once the SO has been marked as dispatched, Sage will automatically create a Product Invoice. When the Invoice is updated to the ledgers a Sales Invoice (SI) is created against the Sage Customer Account. Generally this will contra off the SA leaving a balance on the Customer Account of zero.
- 3. However, both transactions will still be outstanding and will need to be allocated against each within a bank. To do this the user needs select the relevant bank within Sage, click on the Customer button and choose the Customer Account from the drop down list. Both transactions (SA and SI) will appear. Marking both as paid in full will allocate the transactions together.

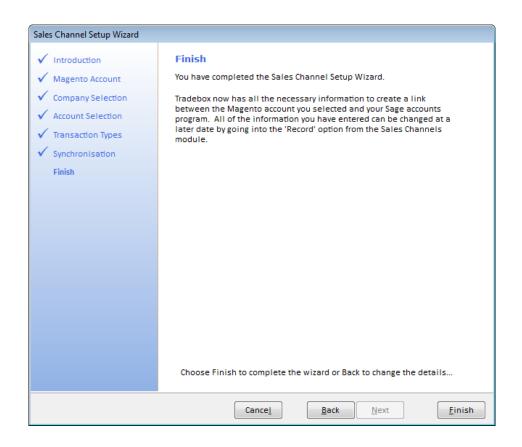


Where the user has chosen to create individual customer accounts in Sage, the task of allocating the transactions together in the bank will become significantly time consuming, especially if they conduct many online transactions.

A work around does exist for this is Tradebox, which prevents the creation of an SA to the Customer Account and allocates a Sales Receipt against the invoice, as described for Service and Product invoicing. However, this only works where the SO is fully dispatched and should not be used if SO's are partially dispatched.

The work around can only be applied after the set up wizard is complete and the connection has been set up. Once done, select the Sales Channel List and double click on the connection. In the screen displayed, untick the **Post Sales Receipts** tick box and then re-tick it. A dialog box will be displayed to confirm this setting. Click on **OK**.

19. Click Next and on the final page of the wizard select Finish.



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Applying and refining additional settings

Sales Channel List

Upon completion of the **Sales Channel Setup Wizard**, a connection to Magento will be established in the **Sales Channel List**. This is the working screen of the software and contains an overview of every marketplace/website a connection has been created for. To access the Sales Channel List, select the **Sales Channels** option from the **Information** menu.

Туре		Sales					
Туре		ouros	Channel Lis	st			Support Log
	ID	Currency	Orders	Pending	Turnover	Status	Last S
Amazon UK						NO	
Amazon US	Amazon.com	USD	٥	٥	0.00	NO	26/10/2012 12:
ChannelAdvisor	channeladvisor	GBP	1,126	0	22,004.05	NO	25/10/2012 16:
Magento	Magento	GBP	717	0	71,784.58	NO	23/10/2012 10
eBay	Sagedeveloper	GBP	4,000	0	33,937-55	NO	23/10/2012 10:
ЕКМ	www.tradebox.uk.com	GBP	344	1	4,292.73	NO	29/10/2012 10:
Switch Status	Delete Renew Aut	thorisation Ch	ange Sage Company	Delete	Queue File		
	Magento eBay EKM	Magento Magento eBay Sagedaveloper EKM www.tradebox.uk.com	Magento GBP Bay Sagedeveloper GBP EKM www.tradebox.uk.com GBP	Magento Magento GBP 727 eBay Sagedeveloper GBP 4,000 EKM www.tradebox.uk.com GBP 344	Magento Magento GBP 7.7 o eBay Sagedeveloper GBP 4,000 o EKM www.tradebox.uk.com GBP 344 1	Magento Magento GBP 727 o 71,784,58 eBay Sagedeveloper GBP 4,000 o 33,937,55 EKM www.tradebox.uk.com GBP 344 1 4,392.73	Magento Magento GBP 737 o 71,764.58 NO eBay Sagedeveloper GBP 4,000 o 33.937.55 NO EKM www.tradebox.uk.com GBP 344 1 4,122.73 NO

The command buttons at the bottom of the Sales Channel List affect the connection selected in the list at the time of selection.

Double clicking on the connection in the Sales Channel List opens the **Sales Channel Record** which contains all of the settings and configuration for that specific connection. The Sales Channel Record also holds all of the **mapping tables** for the connection which record and store the relationships between the data downloaded from the online marketplace/website and the entries in Sage.



These tables cover mappings for:

- Customers
- Products
- Shipping Methods
- Payment Methods

The following pages will cover additional features and settings not explained in the previous wizard walkthrough.



Sales Channel Details

The first page of the Sales Channel record is the **Sales Channel Details** page. This page holds a variety of additional settings that can be applied and/or changed.

Sales Channel Record - Channel I Options	Details			
Sales Channel Details	Sales Channel ID:	Tradebox - Magento Store	Change Cl	hannel ID
Sage Installation Posting Accounts	When Downloading	COMPLETE#PAID		
Transaction Postings Pricing & Discounts	Exclude from Synchronisation:		Post Customer Receipts: Treat All Sales as Pending:	
Customer Mapping Shipping Mapping	Magento API Details			
Payment Mapping	API URL: API Username:	http://www.tradebox.uk.xom/api/xmlrpc username		
	API Password:	password		
	Synchronisation Date	30/12/1899		
			<u>S</u> ave	Close

The 'Change Channel ID' button allows the user to rename the connection. Simply click on this button and enter a new name. All sales channel names must be unique.

Exclude from Synchronisation suspends the connection and excludes it from the download or upload process.

'Post Customer Receipts' ensures that a Sales Receipt is paid into a nominated Sage bank upon updating the Sage invoice created by Tradebox.

Treat all Sales as Pending places all sales imported from the connection directly into the Pending Folder.

The **Synchronisation Date** option allows the user to establish a rule for Tradebox to **ignore sales prior to a specified date**. The **Save** button must be selected to record any changes made.



Sage Installation

Options * Sales Channel Details Installation Accounts Bage installation Porting Accounts Transaction Posting & Discounts Connection Pricing & Discounts Connection Customer Mapping Onname: Payment Mapping TRADEBOX	🥻 Sales Channel Record - Sage Inst	allation		
Sales Channel Datalis Sage instaliation Pasting Accounts Transaction Postings Pricing 8. Discounts Customer Mapping Shipping Mapping Payment Mapping	Options 🔗	 Installation and Company 	Selection	
Sign Installation Company: Practice Data Posting Accounts Transaction Postings Pricing & Discounts Connection Customer Mapping Data Folder: TRADEBOX	Sales Channel Details	Installation Folder:	c:\program files\sage\accounts\	
Transaction Postings Pricing & Discounts Customer Mapping Bilipping Mapping Payment Mapping		Company:	Practice Data	
Pricing & Discourss Customer Mapping Bhipping Mapping Payment Mapping	Posting Accounts	Data Folder:	c:\programdata\sage\accounts\2012\practice\accdata\	
Pricing & Discounts Customer Mapping Payment Mapping	Transaction Postings			
Customer Mapping Bayment Mapping	Pricing & Discounts		TRADEBOX	
Payment Mapping	Customer Mapping	Logon Name:	IRADEBOX	
	Shipping Mapping			
Open Sage Company File Chance Sage Company Close	Payment Mapping			
Open Sage Company File Change Sage Company Close				
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			Open Sage Company File Change Sage Company.	. Close

The Sage Installation screen shows the user which Sage Company Tradebox is pointing to and where the Magento Sales downloaded will be created.

This screen also shows the Sage user name that has been provided by the user to enable Tradebox to log into Sage. Tradebox highly recommends creating a unique Sage user name specifically for Tradebox. Providing Tradebox with the standard Sage 'Manager' username, often leads to login conflicts.

These details can be changed by selecting the 'Change Sage Company' button.

Open Sage Company File opens the local Sage Company file (in Notepad) containing a list of all Sage companies in the user's data set. This feature should only be used when directed by Tradebox support.



Posting Accounts

🧭 Sales Channel Record - Posting Ac	counts		
Options 🛠	Customer Accounts		
Sales Channel Details	Default Customer:	WEBSALES - Website Sales	▼
Sage Installation	Auto Generate Records:		
Posting Accounts	Map customer accounts using eMail and Postcode:		stomer accounts using to Customer ID:
Transaction Postings	Nominal Accounts		
Pricing & Discounts	Sales Nominal:	4004 - Web Sales	▼
Customer Mapping	Override Product Nominal:		
Shipping Mapping	Carriage Nominal:	4905 - Distribution and Carriage	-
Payment Mapping	'Other' Nominal:	4900 - Miscellaneous Income	•
	 Sage Account Reference Generation 		
	Mask:	@@@@@ @£££	Show Example
	Primary Field:	Company Name	•
	Secondary Field:	Surname	▼
	Tertiary Field:	Forename	▼
	Address:	Billing	▼
			Save Close

Map customer accounts using email and Postcode is only applicable if the option to auto generate individual customer records in Sage has been chosen. Ticking this option instructs Tradebox to search through existing customer records in Sage and determine if a customer already exists based upon the email and postcode in the imported order. If there is a match for both criteria then Tradebox will link the order to the existing customer account. If there is not match Tradebox will create a new customer record. This feature will slow the import routine and requires that the Sage user name provided to Tradebox has Full Access.

'Map customer accounts using Magento Customer ID' allows the internal Magento Customer ID to be used as the Sage Account Reference.

Sage Account Reference Generation: This feature allows the user to determine how the Sage Customer Account Reference (SCAR) should be configured and is only applicable if the option to create individual customer records has been chosen. Customer Account References in Sage have a maximum of 8 characters. The tools in this section allow the user to determine:



- a. What information the SCAR should be based upon
 - i. Company Name
 - ii. Surname
 - iii. Forename
- b. The priority the data upon which the SCAR is based should be in
- c. Which address information to base the SCAR upon (billing address or shipping address)
- d. The format of the SCAR in terms of letter and numbers through the use of a Mask.

The 3 pieces of information upon which the Sage Customer Account Reference can be based are the buyer's company name, surname or forename. The priority of this information is established in the primary, secondary and tertiary fields. Where information on the highest priority field may not exist in the feed, Tradebox will move to the second priority and then the third. So, in the above example the highest priority is the company name. If this exists in the feed it will be used. If this field is blank, Tradebox will move to the second priority, which in the above example is the buyer's surname.

Mask: The mask allows the user to establish how many letters and/or number to use in the creation of the Sage Customer Account Reference (SCAR). In the mask:

@ equals a letter£ equals a number

Using the above example (@@@@£££) Tradebox would create the SCAR using the first 5 characters of the data followed by 3 numbers. The numbers are incremental to allow separation of different customers with similar information. For example, if John Smith and Adam Smith made purchases Tradebox would create SMITH001 and SMITH002 Customer Account References in Sage.

The mask can also contain prefixes. So, if you wished to prefix the SCAR with an 'M' (for Magento) then you would simply type the letter into the mask as follows:

M@@@£££

The mask will always be limited to 8 characters, which is the maximum Sage allows.



Transaction Postings

tions	Transactions				
Sales Channel Details	Post Sales as:	Product Invoice			
Sage Installation	Product Mapping Basis:	SKU			
Posting Accounts	Department:	Web Sales			
Transaction Postings	Invoice/Order Date:	Transaction Created Da	te		•
Pricing & Discounts	Default Courier:	Royal Mail			
Product Mapping	Carriage Department:	Web Sales			
Customer Mapping Shipping Mapping	Add Message Line:			Process BOM Transfers:	
Payment Mapping	Use Item Description:			Create Product Records:	
	Create Purchase Orders:			Create Products as 'Non Stock':	
				Allocate Stock:	
	UK Sales: EU Sales: Rest of World Sales: Use Product Tax for Carriage:	Sales T1 - 20.00% ▼ T1 - 20.00% ▼ T0 - 0.00% ▼	T1-20.00%		
	Currency Posting Sale Currency:	GBP	Post in Sale Currency:	Yes	

The Transaction Postings screen enables a number of additional settings to be applied, as follows:

Department: allows the user to allocate sales income from imported Magento sales to an established department in Sage. This is useful to isolate sales income in Sage from a given marketplace.

Invoice/Order date: This is the date used on the Sage invoice. By default this is set to the date the transaction occurred. However this can be changed to the **Paid Date** or the **Downloaded Date**.

Default Courier: allows an existing default courier from Sage to be added to the order details on the Sage invoice

Carriage Department: allows carriage income to be allocated to an established department in Sage. This is useful to isolate carriage income in Sage from a given marketplace.

Add Message Line: allows the user to add any message left by the customers onto the invoice in Sage.



Use Item Description: uses the product description from Magento on the Sage invoice, as opposed to using the description from the Sage Product record.

Create Purchase Orders: Automatically creates Purchase Orders in Sage to the supplier of the product, at the established cost price, for delivery to the buyer. Product needs to be specifically marked as a dropship item in the Product Mapping Screen first. *Requires Sage 50 Accounts Professional.*

Process BOM Transfer: Instructs Tradebox to transfer component parts into a preexisting Bill of Materials (BOM) in Sage, as and when an order containing a BOM product is downloaded. Requires Sage 50 Accounts Plus or Professional.

Create Product Records: Instructs Tradebox to automatically create a new product record in Sage for any Magento product it cannot automatically match to an existing Product in Sage. Products created in Sage by Tradebox only contain a Product Code, Description, the Sage default tax code and the Sage default nominal code. All other information that can be entered against a Sage product, such as location, supplier, cost price, sales price, quantity in stock etc., will need to be added manually. Generally this function is used as an initial option to get stock records set up in Sage. It is NOT recommended to have this function permanently turned on.

Create Products as Non Stock: If the user has chosen to auto create products in Sage then this setting allows them to specify the creation of Non Stock products, i.e. product records that do NOT carry a quantity.

Allocate Stock: Where Sales Orders have been chosen as the transaction type to be created, Tradebox will automatically allocate stock to the Sales Order upon creation. *Requires Sage 50 Accounts Professional*

Use Product Tax for Carriage: Where Product Invoices or Sales Orders have been chosen as the transaction type in Tradebox, the software has the ability to amend the VAT liability on Carriage in line with the first product in the order.



Pricing & Discounts

🧭 Sales Channel Record - Transactio	on Postings		- • •
Options 🛠	Discounts		
Sales Channel Details	Discount Type:	Order Discount 🔻	
Sage Installation	 Magento Product Details 		
Posting Accounts	Get SKU from:	Simple Product 🗸	
Transaction Postings	Get Price From:	Simple Product 🗸	
Pricing & Discounts			
Product Mapping			
Customer Mapping			
Shipping Mapping			
Payment Mapping			
			Save Close

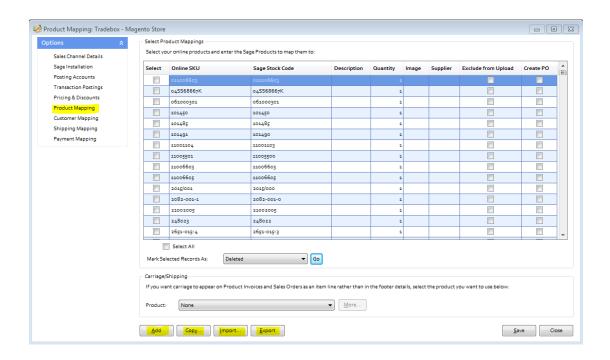
The Pricing & Discounts section allows users to configure Tradebox to deal with discount types, as well as providing options on which product type to obtain the Magento SKU from and which Product to get the Price from.



Product Mapping

The Product Mapping screen holds the relationship between the online product and the corresponding Sage Product Code. This relationship or mapping can be either **Online SKU** mapped to **Sage Product Code**, or, **Online Product Title** mapped to **Sage Product Code**

In both instances the online product identifier is always mapped to the **<u>Sage Product Code</u>**. This choice is established during the sales channel set up wizard.



In most cases the product mappings in the table are created **automatically** as sales are imported into Tradebox. Online product SKU's are mapped automatically when the online SKU and the Sage Stock Code are an exact match. If the online SKU imported does not match an existing Sage Stock Code, Tradebox alerts the user and invites them to manually allocate the non-matching online SKU to an existing Sage Stock Code.

Product Mappings can be added one at a time by clicking on the Add button.

Product Mappings can be copied from another existing connection by selecting the **Copy** button.

Alternatively, Product Mappings can be imported in a csv file in advance of using Tradebox by utilising the **Import** button. The csv template can be obtained by selecting **Export** button and saving the csv file locally.

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Where the user wishes to automatically create Purchases Orders in Sage for given products these need to be identified in this screen by ticking the **Create PO** box next to the relevant product. The **Create Purchase Orders** box also needs to be ticked in the **Transaction Postings** section of the Account record. When Tradebox imports an order with a product that has been marked as **Create PO**, it will automatically raise a Purchase Order (PO) in Sage, with the Product Suppliers name and billing address, at the last cost price with the buyers shipping address. For this to work seamlessly, the Sage Product Record needs to have a supplier allocated to it and have cost prices recorded against it. *Requires Sage 50 Accounts Professional*.

If the user wishes the **shipping method to appear on the body of the Sage invoice/order** as a product line, rather than in the footer of the invoice, then a default carriage product needs to be selected from the drop down menu under the **Carriage/Shipping section**. Further settings need to be established in the **Shipping Mapping section**.



Customer Mapping

The Customer Mapping screen holds the relationship between the **Sage Customer Account** and the unique buyer details in Tradebox and enables Tradebox to recognise which existing Sage Account to use for a returning buyer.

ns 🌣		
ales Channel Details	Customer	Online Customer ID
age Installation	WEBSALES	1112
osting Accounts	WEBSALES	1172
ransaction Postings	WEBSALES	1469
ricing & Discounts	WEBSALES	1472
roduct Mapping	WEBSALES	1474
ustomer Mapping hipping Mapping	WEBSALES	1475
ayment Mapping	WEBSALES	1476
.,	WEBSALES	1478
	WEBSALES	1479
	WEBSALES	1480
	WEBSALES	1481
	WEBSALES	1482
	WEBSALES	1483
	WEBSALES	1484
	WEBSALES	1486
	WEBSALES	1487
	WEBSALES	1488
	WEBSALES	1489
	WEBSALES	1490
	WEBSALES	1491
	WEBSALES	1492
	WERSALES	1/02

Customer Mappings are created automatically by Tradebox when importing orders. However, Customer Mappings can be added by clicking on the Add button.

Customer Mappings can be copied from another existing connection by selecting the **Copy** button. Alternatively, Customer Mappings can be imported in a csv file in advance of using Tradebox by utilising the **Import** button.

A common mapping error results when Sage Customer accounts, that have been created by Tradebox, are deleted from Sage. The error results because the Sage Customer Account Reference (SCAR) held in the Tradebox database no longer exists in Sage. Selecting the **Sync with Sage** button will recreate any missing Sage Customer Accounts in Sage that are held in the customer mapping table. This can take some time depending upon the amount of customer records held in Tradebox and sage Accounts.



Shipping Mapping

The Shipping Mapping screen shows how carriage is reported onto a Sage invoice and also how the income from carriage is reported into Sage.

By default Tradebox displays the carriage amount on the carriage footer of the Sage invoice and reports the carriage income to the default carriage nominal code, as established in the Sales Channel Setup Wizard. Nominal code reporting can be amended in this screen so different shipping methods are reported to different nominal codes.

	Shipping Methods			
Sales Channel Details	Nominal Codes Stock	Codes		
Sage Installation	Shipping Method	Nominal Code	'Familiar' Name	Courier
Posting Accounts	Adminshipping Adminshipping	4905 - DISTRIBUTIO		Parcel Force
Transaction Postings	Customshippingrate Customshippingrate	4905 - DISTRIBUTIO		Parcel Force
Pricing & Discounts	M2eproshipping M2eproshipping	4905 - DISTRIBUTIO		Parcel Force
Product Mapping Customer Mapping	Productmatrix 1St Class Post - Royal Mail (2 T	4905 - DISTRIBUTIO		Royal Mail
Shipping Mapping	Productmatrix Courier - 2 To 3 Days By Sea	4905 - DISTRIBUTIO		Parcel Force
Payment Mapping	Productmatrix Courier - Channel Islands 2 W.	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier - Channel Islands 2-5	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier - Channel Islands Next	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier - Economy 2 To 3 Wor	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier - Highlands Islands 2	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier - Next Working Day B.	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier - Next Working Day B.	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier - Next Working Day B.	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier - Saturday Am Deliver	y 4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier Eu Zone 1 - Two Work	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier Eu Zone 2 - Three Wo.	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Courier Usa Canada - One To	4905 - DISTRIBUTIO		Parcel Force
	Productmatrix Royal Mail - 1St Class Post (2 T	4905 - DISTRIBUTIO		Royal Mail
	Add shipping line even if value is zero			
	Add			Save

Alternatively, carriage can be displayed as a product line on an invoice. To do this a default carriage product needs to be selected from the drop down menu under the Carriage/Shipping section of the **Product Mapping screen**. Once done, the shipping method will appear as Stock Codes at the top of the Shipping Mapping screen. Each shipping method can then be allocated against an established carriage stock code in Sage.

Add shipping line even if value is zero allows the shipping method to still be included on the body of the invoice even if it is a free item.



Payment Mapping

The Payment Mapping allows the user to determine:

- Which payment methods are mapped to which Sage banks
- If the Sales Receipt (SR) should be paid into the Sage bank upon posting the invoice
- Which reference to use against the Sales Receipt (SR)

Sale Channel Details Fayment Method Face Account Super Name Posting Accounts rappropsyment super Opyment Super S		Payment Methods			
Diggeneration Diggener	Sales Channel Details	Payment Method	Bank Account	Reference	SR
Transaction Postings paypal_express 2220 - PayPal Buyer's Name Pricing & Discounts paypal_standard 2200 - PayPal Buyer's Name Product Mapping purchaseorder 200 - HSBC Business Account Buyer's Name Shipping Mapping	Sage Installation	mzepropayment	1240 - Credit Cards		
Pricing & Discounts paypal_standard standard sta	Posting Accounts	paymentsensegateway	1240 - Credit Cards	Buyer's Name	
Product Mapping purchaseorder statum buyer's Name Customer Mapping statum statum buyer's Name	Transaction Postings	paypal_express	1210 - PayPal	Buyer's Name	
Customer Mapping Shipping Mapping		paypal_standard	1210 - PayPal	Buyer's Name	
Shipping Mapping		purchaseorder	1200 - HSBC Business Account	Buyer's Name	
Peyment Mapping					
	Payment Mapping				



Optimising Tradebox and Sage Accounts for reporting

Before downloading sales from Magento there are a couple of final tweaks that will be greatly beneficial for reporting purposes.

Tradebox Settings

In Tradebox select the **Settings** option from the **Configuration** menu which will generate the Settings Screen. This is split into multiple tabs.

Downloads Tab

If you wish to download sales manually (i.e. on demand), tick the 'Always prompt for days/date to download from' tick box. Every time a download is ran, Tradebox will always prompt the user to provide the number of days to go back.

If you wish to download automatically, choose the **Interval** option and from the dropdown list choose the download interval; every 30 minutes, 1 hour, 2 hours, 4 hours, 8 hours or 12 hours.

Dashboard Tab

Configure the settings to display the data as you wish to see it on the Tradebox Dashboard. The Group by Sage Code tick box groups products sold by the Sage Product Code, rather than the online SKU. This provides a more accurate overview of products sold where the same product has multiple online SKU's.

Sage Field Mapping Tab

This section shows which data is reported onto the Sage customer account record and the Sage invoice/order. For the invoice/order settings the following mappings are recommended:

- Order ID = Cust_Order_Number
- Order Taken By = Sales Channel Name
- Payment Method = Notes 1
- Shipping Method = Notes 2

Tradebox Finance Manager V5.5

Sage Certified Solution

Sage 50 Accounts



Sage Invoice/Order List

The invoice/sales order list in Sage can be configured to provide useful 'at a glance' data by including certain columns. Right click on the column headers to reveal all of the available columns. Tradebox recommend including the following additional columns:

- A/C
- Customer Order No
- Order Taken By

Based upon the changes suggested in the Tradebox settings, the invoice list could look as follows:

Invoicing									(All Records	s) 🔍 🗙
New/Edit	Recurring	Quick Print Print	Email Update Labels	(interview) Reports						
Quick Search:			Quick Search Clear							
No.	▼ Type	Date	Name		Amount £ Printed	Posted	A/C	Customer Order No	Order Taken By	~
5346	Inv	27/07/2012	J N Brown		31.74		1487	100003476	Main Website	
5347	Inv	27/07/2012	Vincenzo Zaccarini		94.74		1488	100003477	Main Website	
5348	Inv	27/07/2012	B Conway		148.68		1489	100003478	Main Website	
5349	Inv	27/07/2012	Hugo Gordon		73.44		GORDO001	100003479	Main Website	
5350	Inv	27/07/2012	T Green		15.19		1490	100003480	Main Website	
5351	Inv	27/07/2012	Gary Phillips		50.33		1475	100003481	Main Website	
5352	Inv	27/07/2012	B Evans		25.62		1491	100003482	Main Website	
5353	Inv	27/07/2012	James Murray		42.52		1492	100003483	Main Website	
5354	Inv	28/07/2012	Mike Ridley		11.66		1493	100003484	Main Website	
5355	Inv	29/07/2012	David Bajic		274.70		BAJIC001	100003486	Main Website	
5356	Inv	30/07/2012	Keith Cole		56.07		COLE002	100003487	Main Website	
5357	Inv	30/07/2012	Lee Bishop		62.94		BISH0002	100003488	Main Website	
5358	Inv	30/07/2012	Keith Phillips		141.64		1112	100003489	Main Website	

Where Tradebox has created the invoice/order, the user will be able to quickly ascertain:

- The marketplace each invoice originated on
- The Magento order number
- Which Sage Customer Account the invoice relates to
- Who the invoice is for
- The date of the order
- Whether it has been printed and/or updated



Downloading Orders from Magento

Once the setup is complete, orders from Magento can be imported. To prevent common errors, ensure that:

- The Regional and Keyboard settings on the PC are configured for the UK.
- The time/date on the PC is configured for the UK

To download sales from Magento select the **Download** option from the **Operations** menu. The first time a Magento synchronisation is ran the following dialog box will appear:

Synchronisation	
Synchronisation Date Range	
Enter the date (or number of days) you want to go back to to download transactions from:
Date From:	14/10/2012 To days ago
Date From:	14/10/2012 To days ago
Number of Days:	39
DateTo:	13/11/2012 💌
	Apply to All Sales Channels
	OK Cancel

Either enter the number of day's worth of sales in the 2nd box or enter a Date From and a Date To. Then select OK. Tradebox will only download sales that have NOT been previously downloaded. This ensures that duplication will not occur in Sage.

Running a download takes place in the **Operations Log** which will show a script of the download procedure, detailing how many transactions have been downloaded and how many invoices/orders have been created in Sage. If Tradebox encounters any issues during the download or posting to Sage. It will generate the following message:

There may have been errors during the synchronisation for Sales Channel: XXXXXXX Check the Error Log for details

Alongside the Operations Log are the **Process Log** and the **Error Log**. Click onto the Error Log to see details of each issue Tradebox has encountered. Generally errors are generated because of mapping issues. The most common of these are Product Mapping errors where Tradebox cannot match the SKU in the downloaded order to an existing Product Code in Sage. Select the **Error Corrections** button to generate a grid where the mappings can be done manually. To see an explanation of the common errors, select the **Common Errors** button.



Orders

To view a list of orders imported into Tradebox click on the **Orders** option under the **Information** menu. This will generate the '**Imported Orders Criteria**' dialog box, with options to choose:

- Orders from all connections, or, orders from a specified connection
- The type of order you wish to see; Posted to Sage, Unposted or Pending.

Sport Sale Sale Sale Sale Total Databased based	Tradebox Finance Manager 201	3							
Abela Hard Image: Control statistication Prove Unit Statis	usiness 🏾 🕆				Pen	ding Orders			Support Log
New Section Processing Prof. Express Oracity Social Sciences Processing Prof. Express Oracity Social Sciences Processing Pr	Support	Select Sales Channel ID A	Billing Name	Sale Date	Order Status	Payment Method	Transaction Status	Qty. 🗹 Stock Code	Title
Measure short Market in the state of the state is the state of the	Dashboard	Order ID: 12277/181012/84							
persons statistics Processing Party Lipsets Checked SUCCES SUCCES<	News	www.tradebox.uk.com	Kirill Kondrashin	18/10/2012	Processing	PayPal Express Checkout	SUCCESS : 8F622393MX6786	1 B0081-0021-0007	iPhone 5 skin - Rossi w
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Dereindad Imer Contractions Postering Imer Trackets uk.com Staphan Johnson Stapha		www.tradebox.uk.com	Pascal Redpath	18/10/2012	Processing	PayPal Express Checkout	SUCCESS : 3CU47081FY91314	2 H0026-0076-0016	iPhone 4/45 Case - Pla
terr Conserver and an approximation and approxim		- Order ID: 12279/181012/03							
Point To State Order 10: StateStateStateStateStateStateStateStat		www.tradebox.uk.com	Stephen Johnson	18/10/2012	Processing	Secure Trading	SUCCESS : AUTH CODE:007202	1 B0037-0042-0008	Kindle Keyboard skins
Upond International methods Anticitational methods		- Order ID: 12280/181012/90							
Peking Litt peking Litt Labia www.tradebuc.uk.com Bigens Latio-Peratr shilo/2021 Processing Secure Tracing SUCCESS AUTH CODE calsus a Boost-occes Peroperation of the secure state of the		www.tradebox.uk.com	Jonathan Gell	18/10/2012	Processing	Secure Trading	SUCCESS : AUTH CODE:831426	1 B0037-0026-0003	Kindle Keyboard skins
Pedrag Litt Lahis Amazon Shipping Maraul Order Druzzkijskozujiz Amazon Shipping Maraul Order Družkijskozujiz Amazon Shipping Maraul Order Družkijskozujiz Order Druž		- Order ID: 12281/181012/03							
Lakin Amazo Toke Entry		www.tradebox.uk.com	Biljana Lekic-Parker	18/10/2012	Processing	Secure Trading	SUCCESS : AUTH CODE:018146	1 80026-0028-0010	iPhone 4/45 skins - Su
Anal Create Entry Manual C	Packing List	www.tradebox.uk.com	Biljana Lekic-Parker	18/10/2012	Processing	Secure Trading	SUCCESS : AUTH CODE:018146	1 B0026-0028-0008	iPhone 4/4S skins - Sh
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Number Test Image: Secure Tracing Successing Successing </td <td>Manual Order Entry</td> <td>- Order ID: 12283/181012/95</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Manual Order Entry	- Order ID: 12283/181012/95							
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Orders Image: Secure Tracing Success AUTH CODE copies Is Borg-socie-copies Secure Tracing Customs' Field Image: Secure Tracing Secure Tracing Success AUTH CODE copies Image: Secure Tracing Success AUTH CODE copies<		www.tradebox.uk.com	Edson Bispo Dos Santos	18/10/2012	Processing	Secure Trading	SUCCESS : AUTH CODE:029640	1 80079-0058-0016	Samsung Galaxy S III s
Order Dissplationsplate Outsmars Statemars Fee Logs Sech Lind Dennibed Mess Sales Channel Report Sech Lind Dennibed Base Channel Report Sales Channel Report Secher Dissiphiliteration Lind Dennibed Secher Dissiphiliteration Secher Dissiphiliteration Lind Dennibed Secher Dissiphiliteration Secher Dissiphiliteration Secher Dissiphiliteration Secher Dissiphiliteration Secher Dissiphiliteration Secher Dissiphiliteration Secher Dissiphiliteratin Secher Dissiphilite		www.tradebox.uk.com	Edson Bispo Dos Santos	18/10/2012	Processing	Secure Trading	SUCCESS : AUTH CODE:029640	1 80079-0034-0035	Samsung Galaxy S III s
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Saech All and Bacoba All All and Bacoba All All and Bacoba All All All All All All All All All Al		- Order ID: 12285/181012/31							
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The imported orders chosen in the dialog box are presented in a configurable grid. Columns can be added, removed and sorted into the order required by the user. To move the columns, simply click on the column headers and drag the column into the required position. To add or remove columns, right click on the column headers and from the drop down menu choose the **Select Columns** option. Data in the grids can be sorted in ascending or descending order by clicking on the column headers. Hovering the mouse above the columns will reveal a filter

control \square . Clicking on the control allows the user to filter the grid by data in the column, for example showing all sales between 2 dates.



Customers

Regardless of whether you choose to create individual customer accounts in Sage or simply use a single generic Sage customer account, Tradebox will always hold comprehensive details of every individual customer that is processed through the software. To access the customer list simply click on the **Customers** option in the **Information** menu.

This will provide a configurable grid of customers that can sorted into the order required by the user. Data in the grids can be sorted in ascending or descending order by clicking on the column headers. Hovering the mouse above the columns will reveal a filter control \square . Clicking on the control allows the user to filter the grid by data in the column.

Double clicking into a customer will generate a customer details screen containing more indepth information on the customer, as well as a history of purchases.

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All customer details held in Tradebox can be exported into Excel by selecting the **Export** button.



Uploading Sage Stock Quantities back to Magento

Tradebox enables users to upload Stock Quantities back to Magento.

To do this, select the **Upload** option from the **Operations** menu. This will generate the following screen:

Product Upload	×
Product Upload	
What would you like to do?	
Create/Amend Upload File Settings	
Upload Product Details to File	
O Upload Quantites to Selling Manager Pro (eBay)
Upload Quantites Directly to Listings (eBay)	
Upload Quantities to EKM	
 Upload Quantities to Magento 	
Upload Quantities to ChannelAdvisor:	In Stock 💌
Opload Quantities & Prices to Amazon:	Quantity Only 👻
Select Sales Channel	
Tradebox - Magento Store	
	OK Cancel

- Choose Upload Quantities to Magento
- Choose the relevant Magento Sales Channel and select OK.

A progress screen will show the upload and confirm when complete.

Quantities are taken directly from the free Sage Stock positions **only** for those Magento products mapped in the Product Mapping table.



Menu Options

Business	
Support	Contains serial number, version number, licence type, expiry date, Tradebox contact details, installation path, data path, logs path, videos, guides, send/receive database function, remote support link and repair & compact utility.
Dashboard	Link to dashboard overview of sales processed by Tradebox
News	Indicates new Tradebox news when emboldened . Clicks through to news page on Tradebox website
Messages	Indicates new message from Tradebox when emboldened and red. Clicks through to message page on Tradebox website
Operations	
Download	Runs the download function to connect to online sales platform and import new sales before automatically posting to Sage Accounts. Sales Channel must be turned on (status of YES) in the Sales Channel List for download to occur.
Error Corrections	Loads Error Corrections grid, where sales that cannot be automatically posted to Sage (usually because of mapping issues) can be manually corrected and then posted to Sage.
Post to Sage	Runs the function to send any unposted sales in the Tradebox database to Sage without connecting to the online sales platform first. If there are any errors at the end of the Post to Sage routine, an alert will be displayed in the Operations Log. Full details of each issue encountered during the Post to Sage will be displayed in the Error Log.
Upload	Runs the Upload function to pass Sage 'free' stock quantities back to the



	inventory on the selected sales platform.
Picking List	Generates a Picking List of products and quantities for the criteria provided in the dialog box.
Packing List	Generates a Packing List for each individual order containing SKU's, quantities, delivery information etc.
Labels	Generates Avery Standard label sheets (either 3 x 7 or 2 x 7) of delivery addresses
Amazon Shipping	Generates the Amazon Shipping confirmation grid from where Amazon orders can be marked as despatched and this information passed back to the Amazon marketplace.
Manual Order Entry	Opens the Manual Order Entry form, if a manual entry sales channel has been established in the Sales Channel List.
Information	
Sales Channels	Opens the Sales Channel List which contains an overview of each sales channel established in the software. Double clicking on a sales channel opens the configuration settings for that sales channel and allows the configuration to be amended as required.
Orders	Opens a list of orders downloaded or imported into the Tradebox database. Users can choose to see all orders or orders from a specified sales channel.
Customers	Opens a list of customers.
Fees	Accesses the list of fees imported from specific marketplaces, such as eBay and Amazon.

Sage 50 Accounts



Logs	Opens the Process and error logs for each day	
Search	Generates a search utility.	
Last Download	Opens the Operations log for the last download. From here the user can also access the Process and error log for the last download.	
Configuration		
New Sales Channel	Click on New Sales Channel to generate the Sales Channel Setup Wizard to create a new sales channel in Tradebox	
Sales Channel Record	Opens the configuration settings for the Sales Channel selected in the Sales Channel List.	
Settings	Opens the generic settings for the application which include download options, dashboard options, exchange rates, address/labels, countries table, Sage field mapping and the feedback screen.	
Licence	Accesses the Programme Activation screen to enter serial numbers and activation keys to activate, renew or upgrade the software licence.	
Analysis		
Reports	Access the reports section	
Sales Channels	Provides analysis graph comparing sales channels in Tradebox by turnover or units sold in the last 12 months. By default all products sold are included but graph can be refined to compare specific products by sales channels.	
Units	Provides a Calendar 3 year graph overview of units sold across all sales channels. Can be refined to drill down to units from a specified sales channel.	



Turnover	Provides a Calendar 3 year graph overview of turnover across all sales channels. Can be refined to drill down to turnover from a specified sales channel.
Products	Provides a Calendar 12 month graph illustrating the performance of a specified product. Performance can be changed between units, turnover and average selling price.
Products (All)	Provides a Calendar 12 month grid of all units sold. The grid can include all sales channels or a single specified sales channel. Product performance can be presented as units or turnover.
Countries	Provides an 'all time' graph of countries sold to. Graph can display all countries or be grouped into UK, EU and rest of World Sales. By default sales from all sales channels are included, albeit this can be refined to present country sales from a specific sales channel.
Sales v Fees	Presents a line graph illustrating a Calendar year of sales against fees. Only applicable for Amazon and eBay where fees are downloaded.
Fees	Presents a graph of fees, broken down into specific types. Only applicable for Amazon and eBay where fees are downloaded.
Time of Day	Provides and 'all time' graph of the time of day sales are made from eBay only.
Day of Week	Provides and 'all time' graph of the day of the week sales are made from all sales channels. This graph can be configured for time frames, sales channels and swapped between units and turnover.
Day of Month	Provides and 'all time' graph of the day of the month sales are made from all sales channels. This graph can be configured for time frames, sales channels and swapped between units and turnover.



Amazon Margins	Exports Amazon sales and fees data into an Excel spread sheet, comparing income against fees for each products sold
eBay Margins	Exports eBay sales and fees data into an Excel spread sheet, comparing income against fees for each products sold
Maintenance	
Backup	Enables the Tradebox data to be backed up. Includes options to automate the back up on closing the programme.
Export Data	Where an Export File Format has been created (see below) this function exports the data from a given date range into the existing template which can then be saved.
Relocate Database	Allows the user to export the Tradebox database off the client PC to a shared network drive. Also enables users to point additional installations of Tradebox at the existing database on a shared network drive.
Rebuild Data	Allows users to rebuild data in the Tradebox database. This can be for all channels or for specified channels. Data that can be rebuilt (deleted) includes sales information as well as mappings.
Rebuild Sales Figures	All the data in the Tradebox database to be rebuilt and all analysis and reporting to be recreated.
Archive Order History	Allows Tradebox data, older than 30 days, to be archived to improve performance.
Export File Formats	Allows users to create an export template of specified fields in a given order into a csv or excel spread sheet. Once the template is created and saved, the chosen data is exported using the Export Data option (see above).



Clear Order History	Deletes data from the Tradebox database prior to a given date.
Reset Sage Postings	Allows invoices to be recreated in Sage a second time by resetting the internal sage invoice number in Tradebox prior to a given date or invoice number. Once rebuilt, Tradebox can repost the invoices into Sage.
Restore	Restores previous backups.
Security	Allows a password to be added to the program or an existing password to be deleted or changed.