



Dynamics 365

Business Central

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



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1 Introduction

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



storefront

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

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

2 Get Started

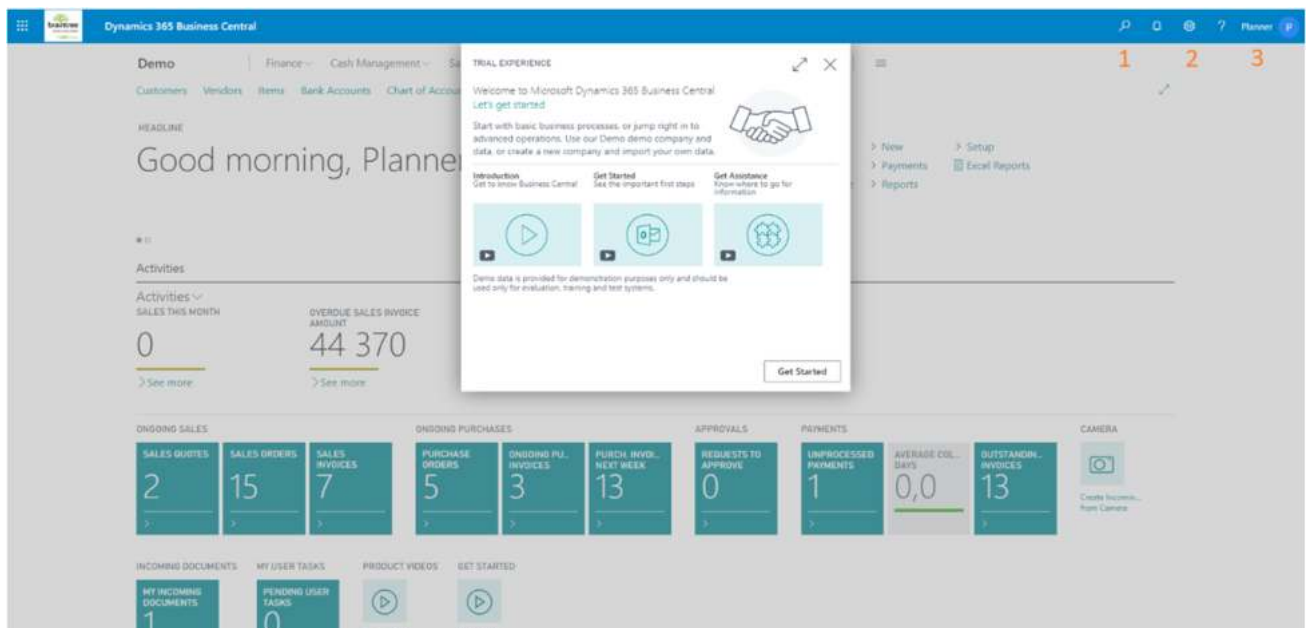
2.1 Admin Login

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

MY-STORE@ONMICROSOFT.COM

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

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

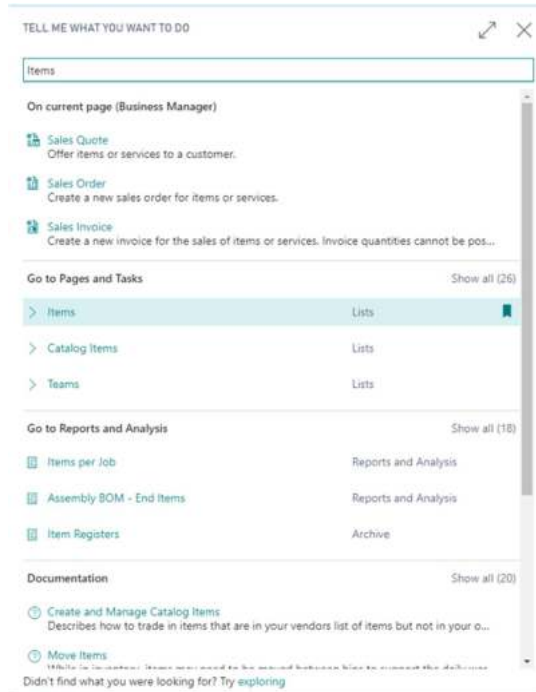


1. Search
2. My Settings
3. Microsoft Account

Search

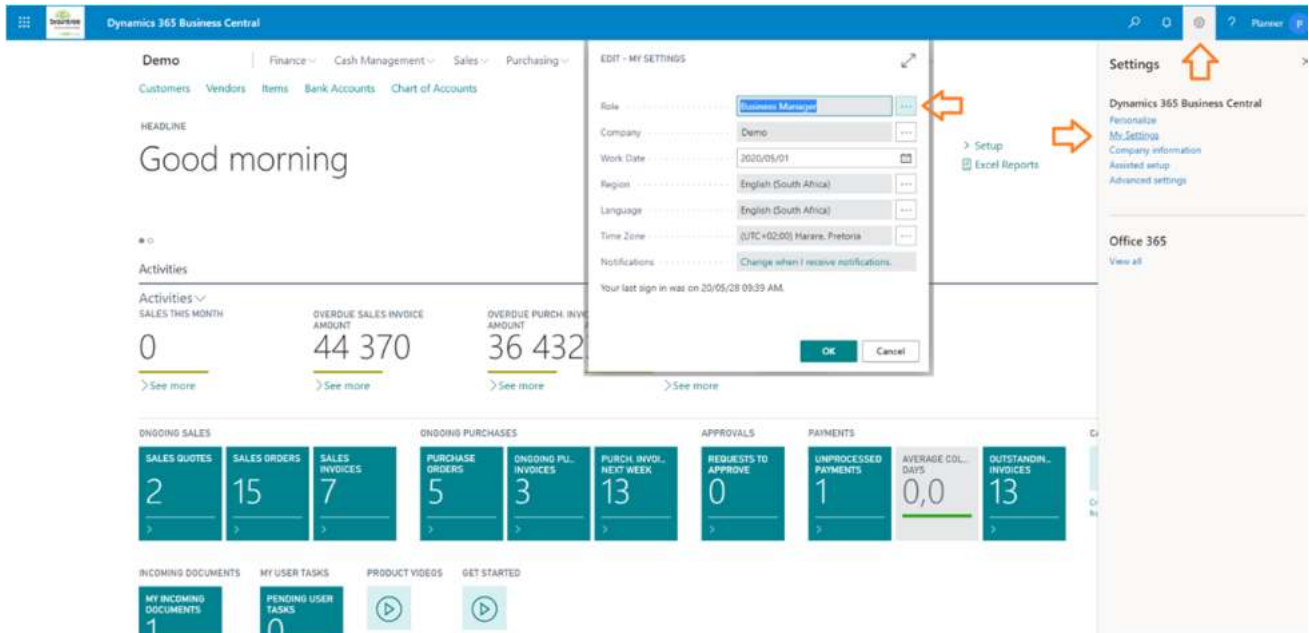


Search for information & tasks such as Items, Customers, Sales Orders & Sales Invoices. Click to open.



2.2 My Settings

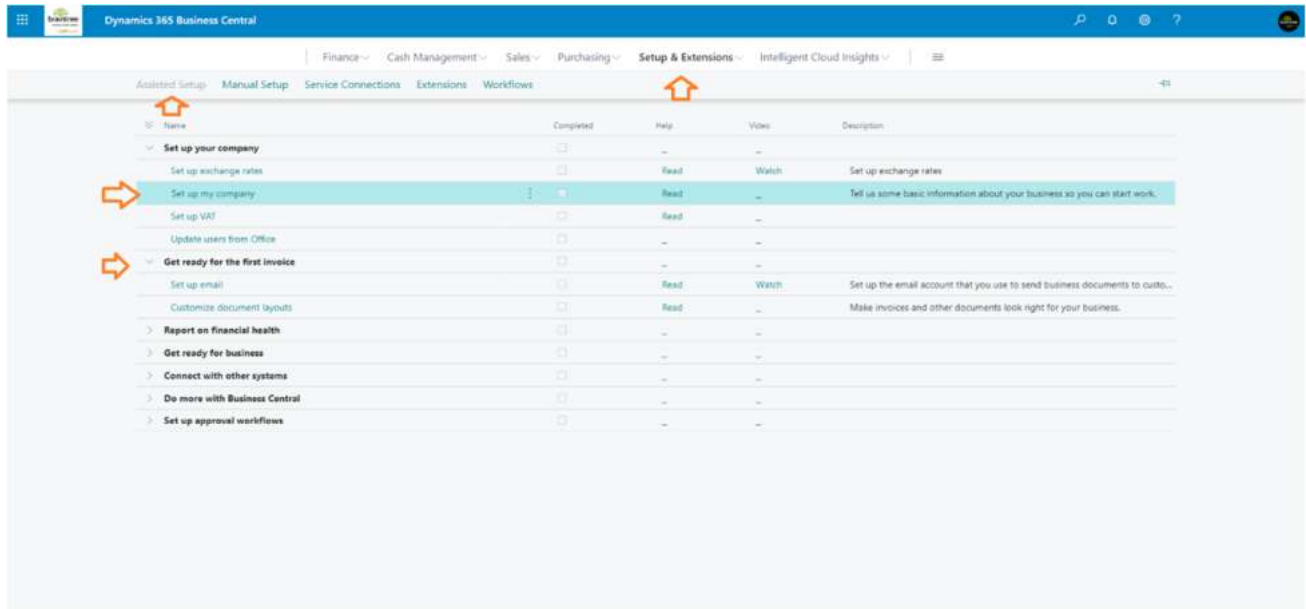
Change your user profile's Role. Start by using the BUSINESS MANAGER or SALES ORDER PROCESSING Role.



2.3 Assisted Setup

Assumes Business Manager Role

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



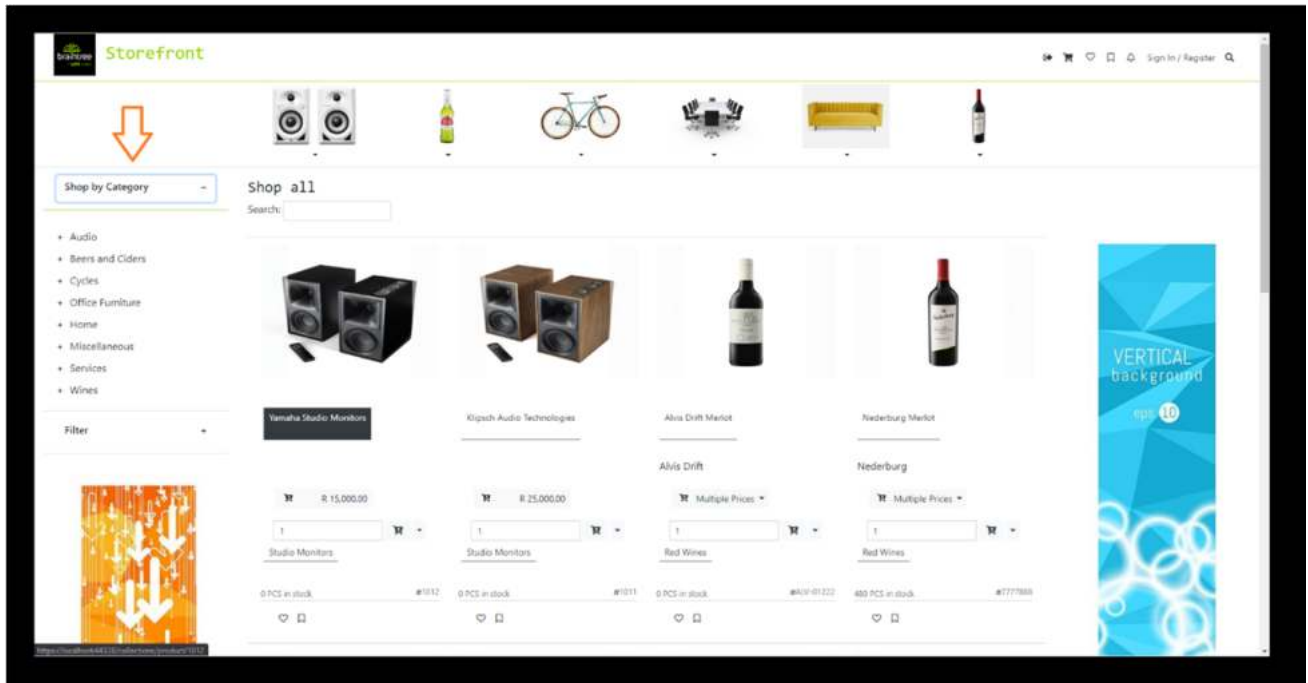
Also consider setting up email and tailoring document layout under Get ready for the first invoice. You can always come back to this step.

3 Departments & Categories

Assumes Business Manager Role

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

Ecommerce categories:



Search & navigate to Item Categories:



ITEM CATEGORIES

Search + New Edit List Delete Edit View Recalculate Page

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

3.1 Create a new Category

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

ITEM CATEGORY CARD

AUDIO

Delete

General

Code AUDIO Parent Category [dropdown]

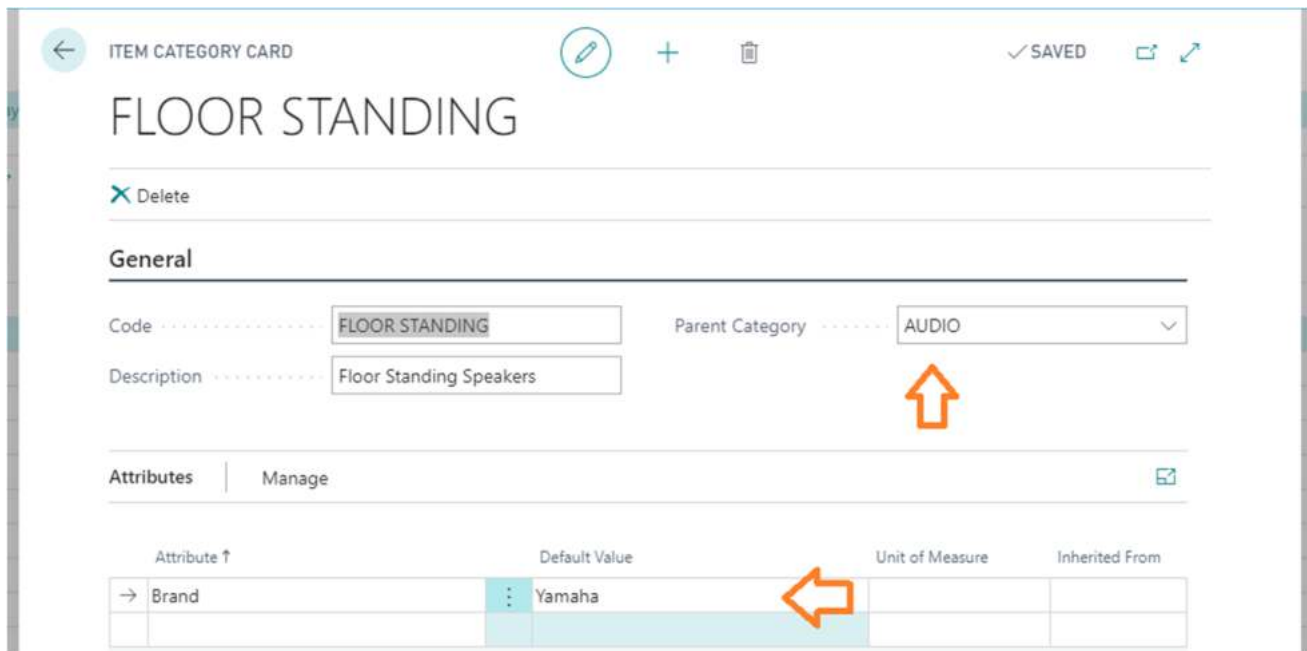
Description Audio

Attributes | Manage [icon]

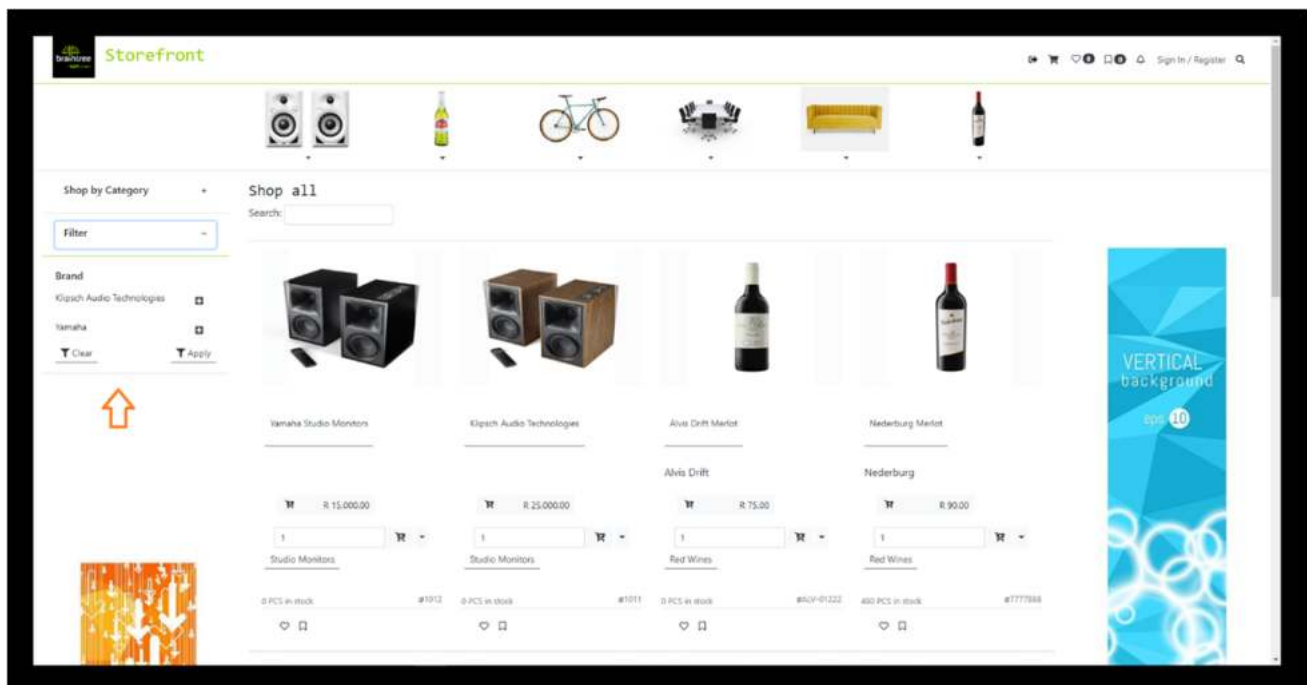
Attribute ↑	Default Value	Unit of Measure	Inherited From
→			

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:

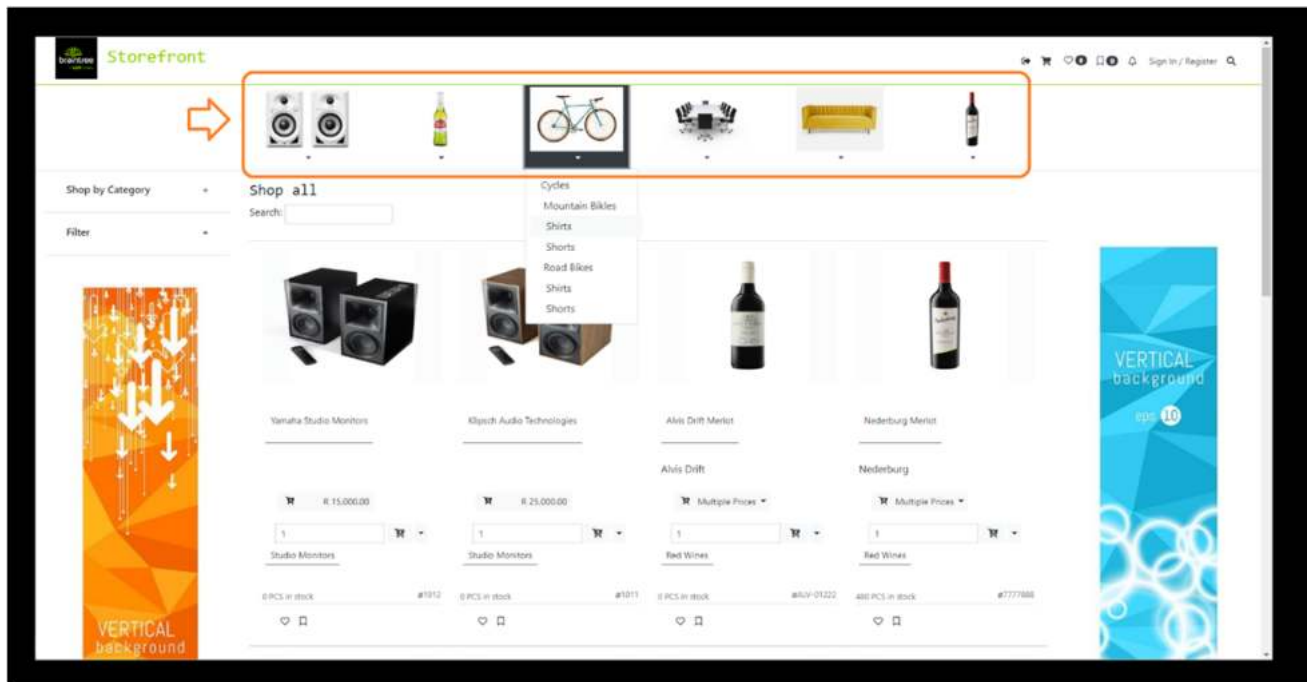


Ecommerce Brand attribute filters:



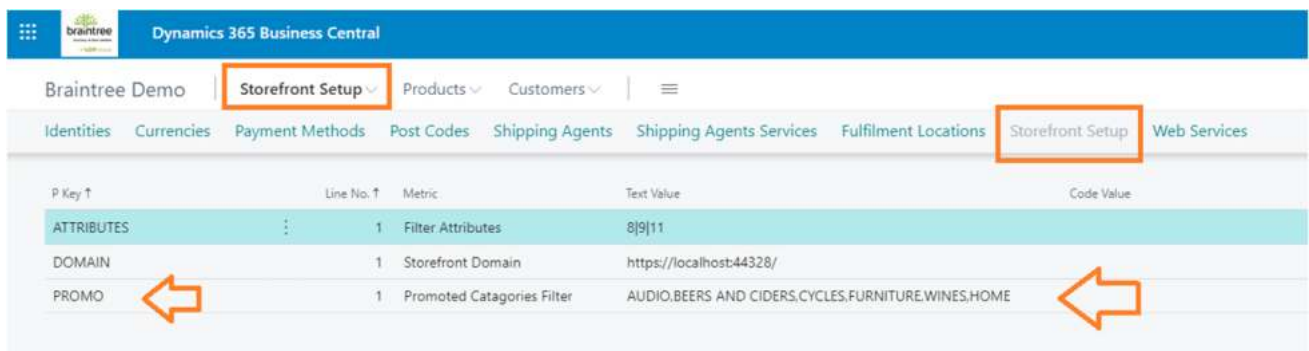
3.2 Promote a Category

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



Change your role to Storefront

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

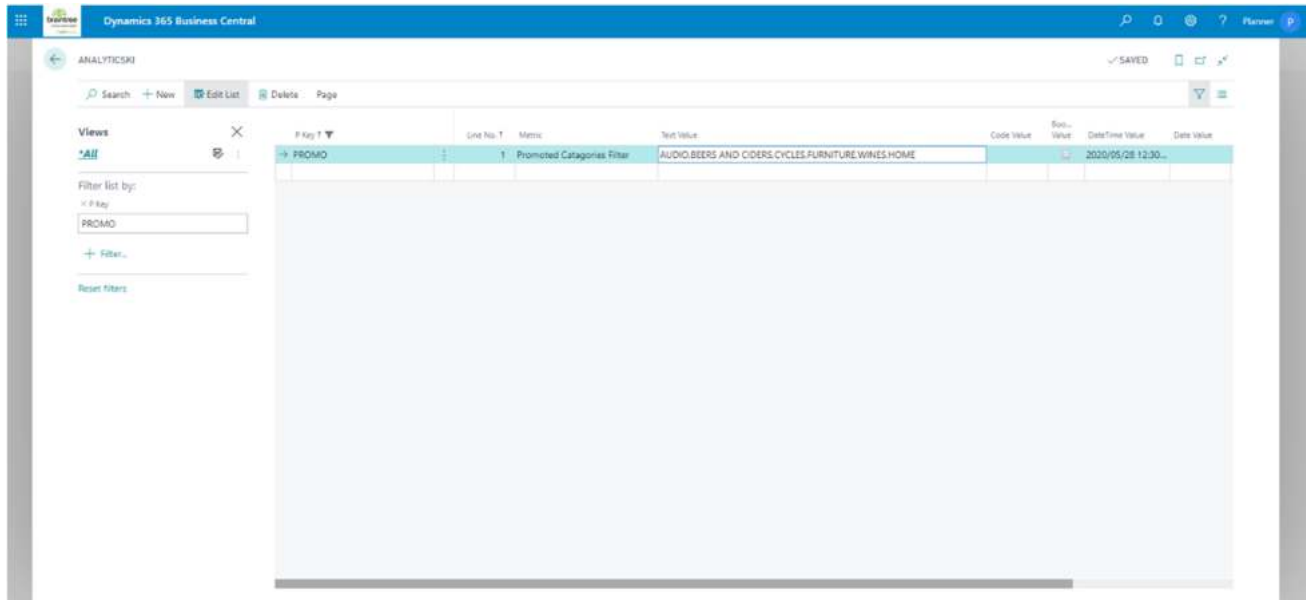


Create or edit the PROMO line to list promoted categories:

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

P Key: PROMO

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

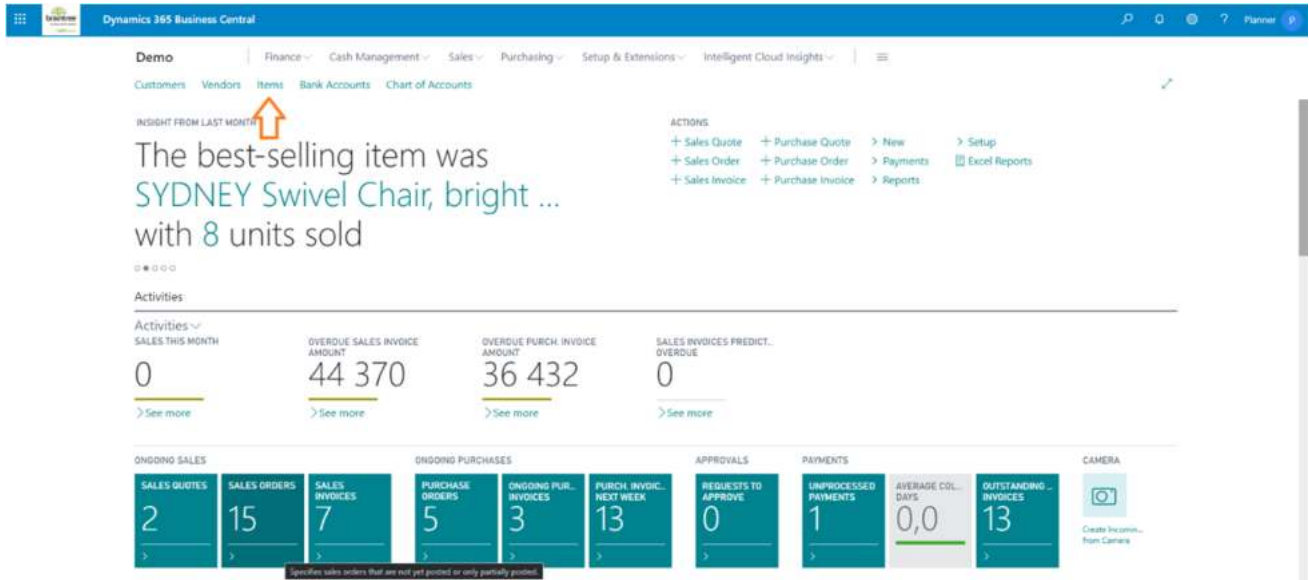


4 List a Product

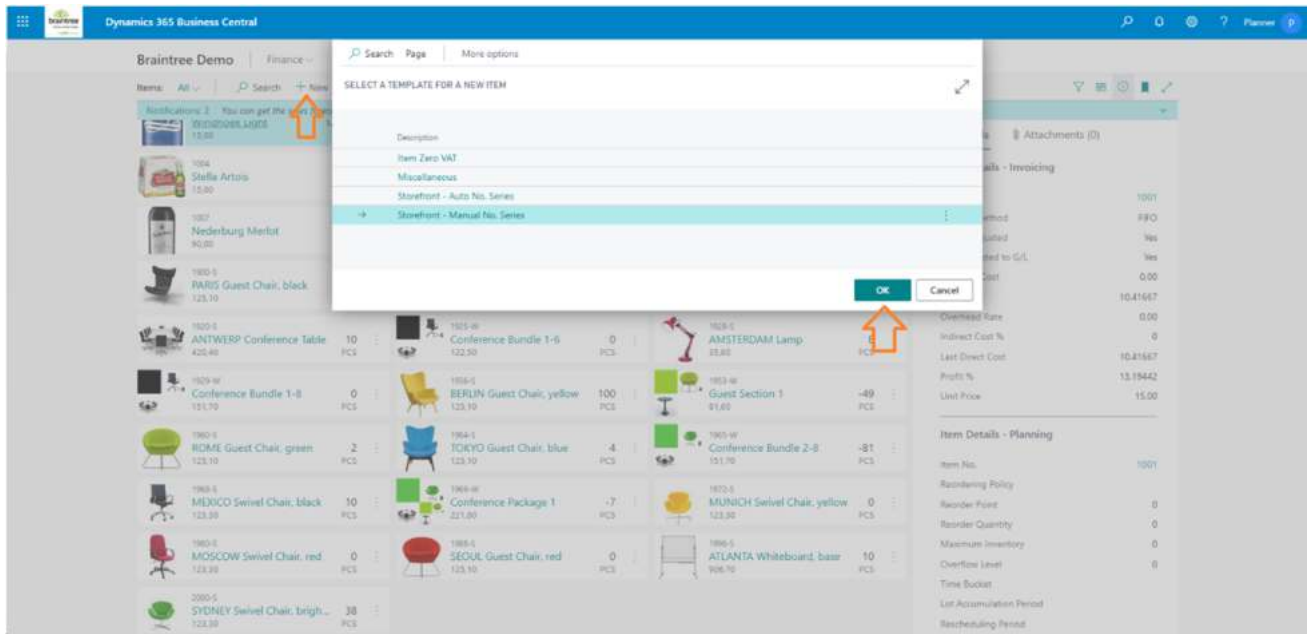
4.1 Create an Item

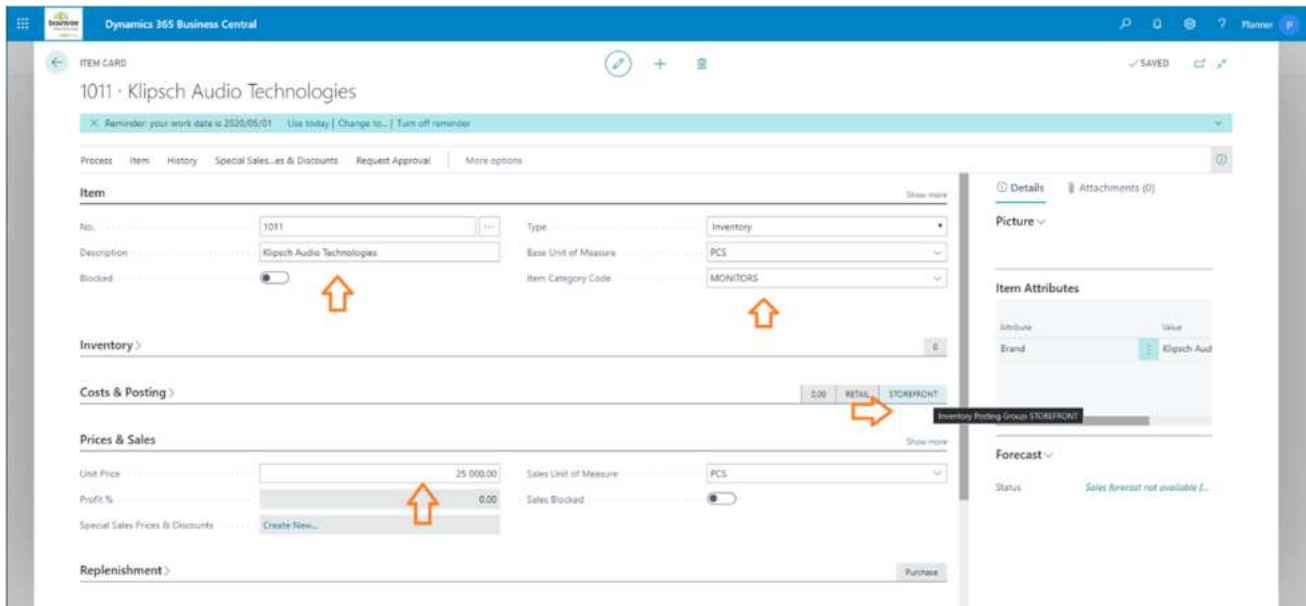
Assumes Business Manager Role

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



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





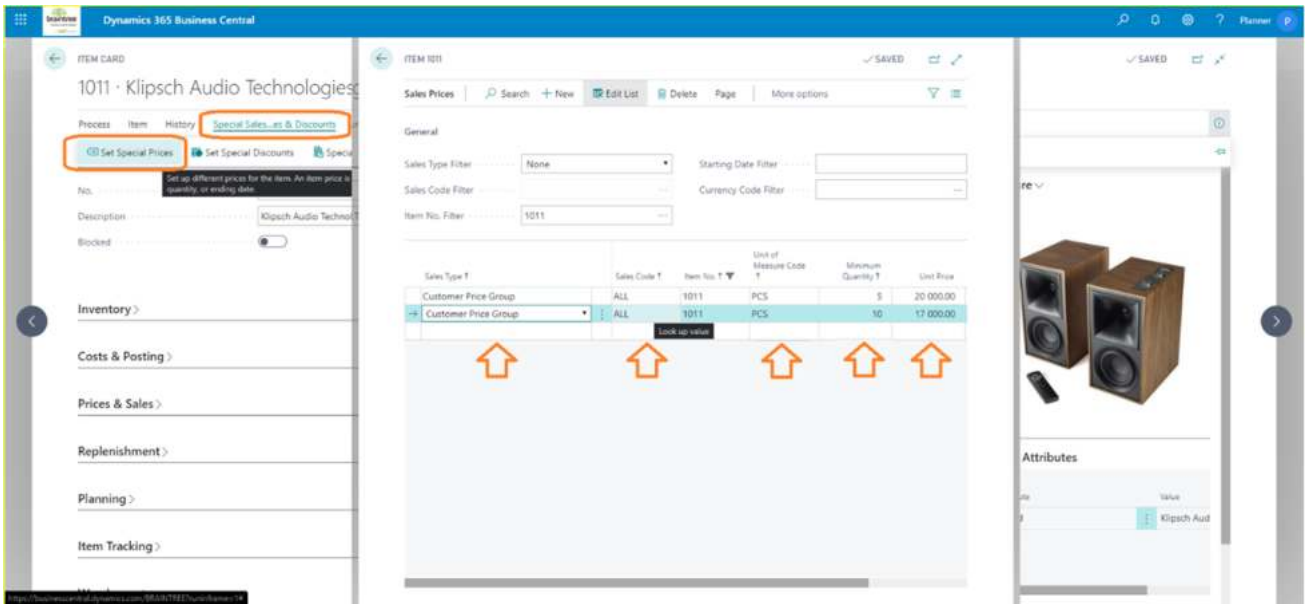
Make sure to specify:

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

4.2 Special Pricing

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

- Quantity breaks
- Different Units of Measure
- Date specific



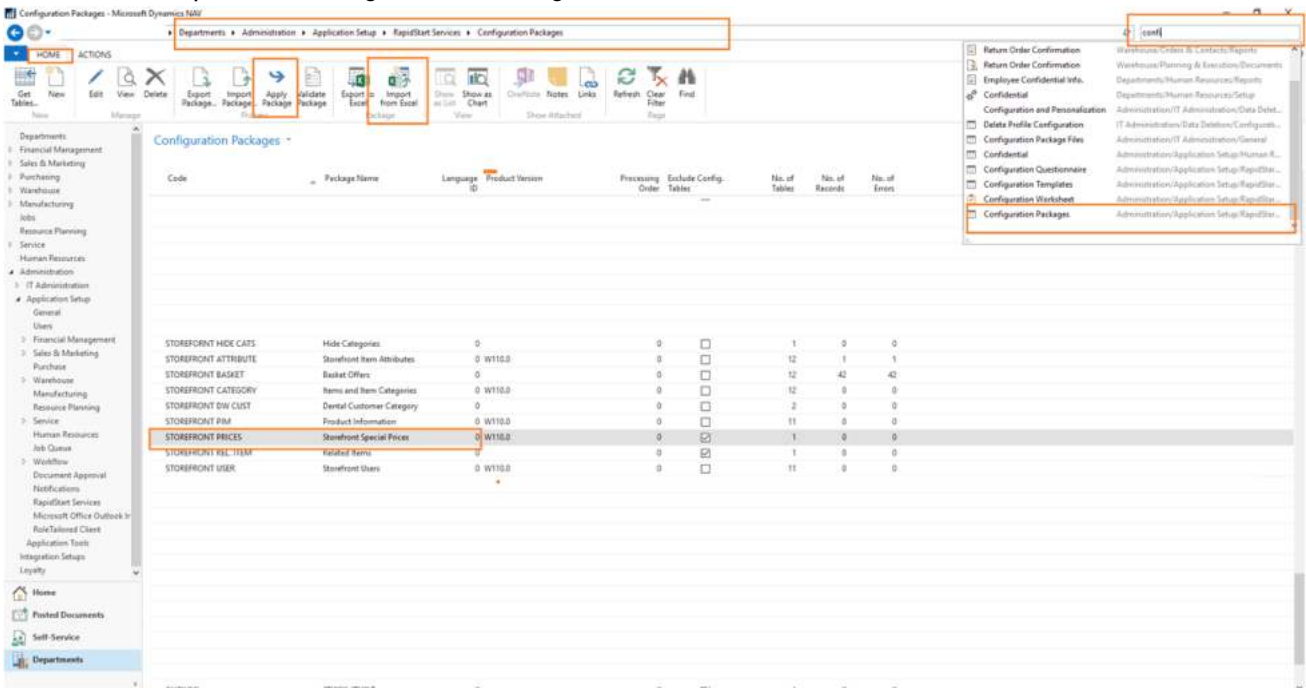
4.3 Delist a product

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

4.4 Bulk Creation

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

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



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

- Open Card and check for import errors:
- HOME (Navigation Bar) > Edit
 - o Config. Package Card:

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

Import File Format:



StorefrontSpecialPrices Import Template.xl

To import, create & update products in bulk, contact us at 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)

P Key	Line No.	Metric	Text Value	Code Value
Item123		variant	Item789 Description	Item789
Item456		related	Item789 Description	Item789
Item789		alternative	Item999 Description	Item999

5 Create a Customer

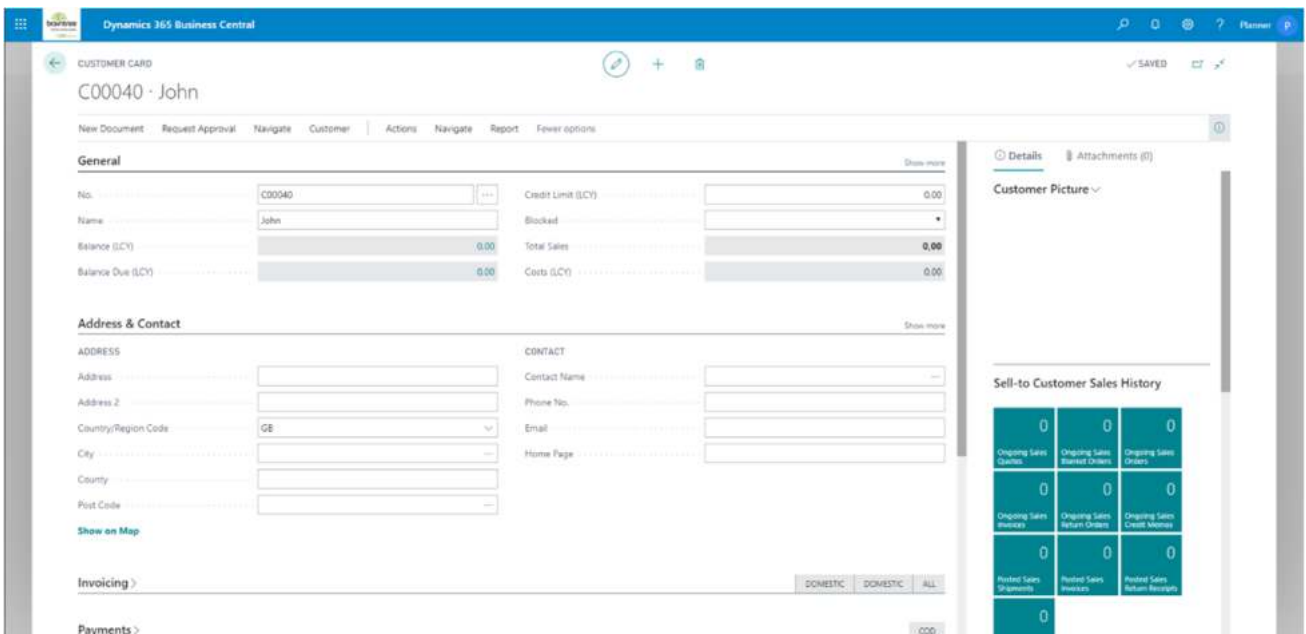
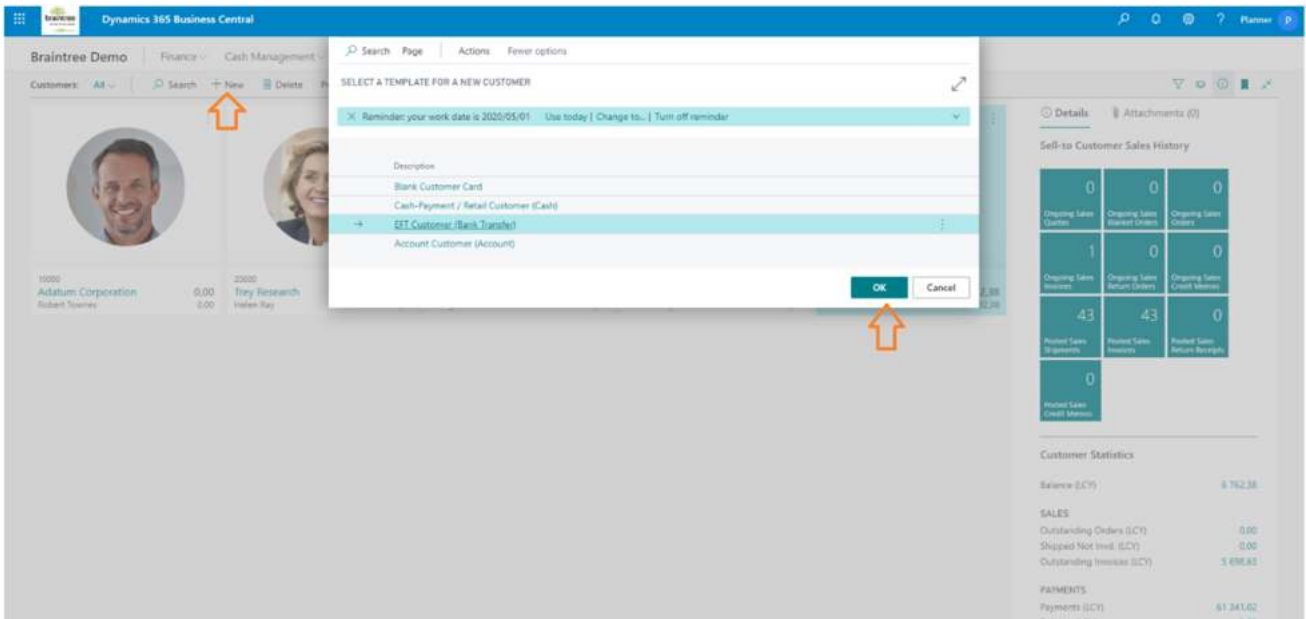
Assumes Business Manager Role

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

Search & navigate to Customers:

The screenshot shows the Dynamics 365 Business Central interface. At the top, there's a navigation bar with 'Demo' and various menu items like 'Finance', 'Cash Management', 'Sales', 'Purchasing', etc. Below the navigation bar, there's a main dashboard area. On the left, there's a navigation pane with 'Customers' highlighted. The main content area displays an insight: 'The best-selling item was SYDNEY Swivel Chair, bright ... with 8 units sold'. Below this, there are several activity cards for 'SALES THIS MONTH', 'OVERDUE SALES INVOICE AMOUNT', 'OVERDUE PURCH. INVOICE AMOUNT', and 'SALES INVOICES PREDICT. OVERDUE'. At the bottom, there are several summary cards for 'ONGOING SALES', 'ONGOING PURCHASES', 'APPROVALS', 'PAYMENTS', and 'CAMERA'. The 'CAMERA' card has a 'Create Incomm. from Camera' button.

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

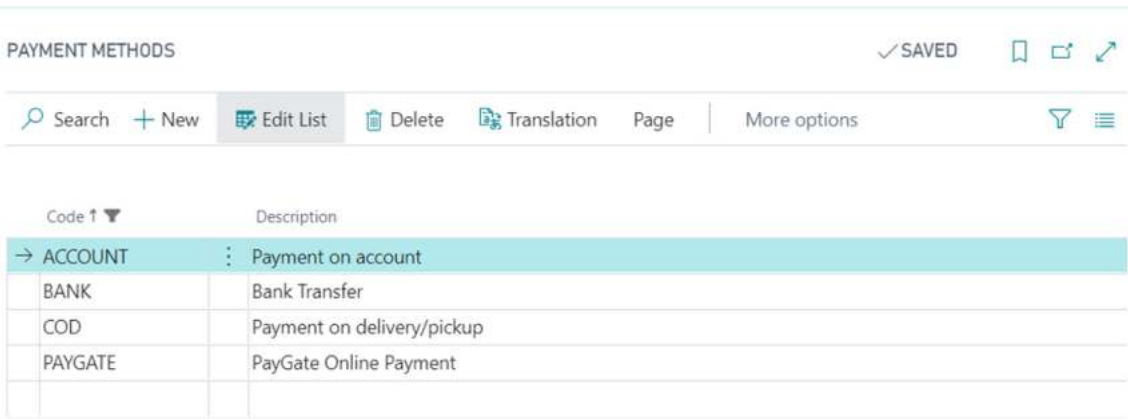


Make sure to specify:

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

5.1 Default Payment Methods

Search & navigate to Payment Methods:



The screenshot shows the 'PAYMENT METHODS' interface. At the top, there is a back arrow, the title 'PAYMENT METHODS', a 'SAVED' status, and icons for bookmark, copy, and share. Below the title is a toolbar with 'Search', '+ New', 'Edit List', 'Delete', 'Translation', 'Page', and 'More options'. The main content is a table with two columns: 'Code' and 'Description'. The 'ACCOUNT' method is highlighted in blue.

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@voxtelcom.co.za.

6 Create an Ecommerce Login Account

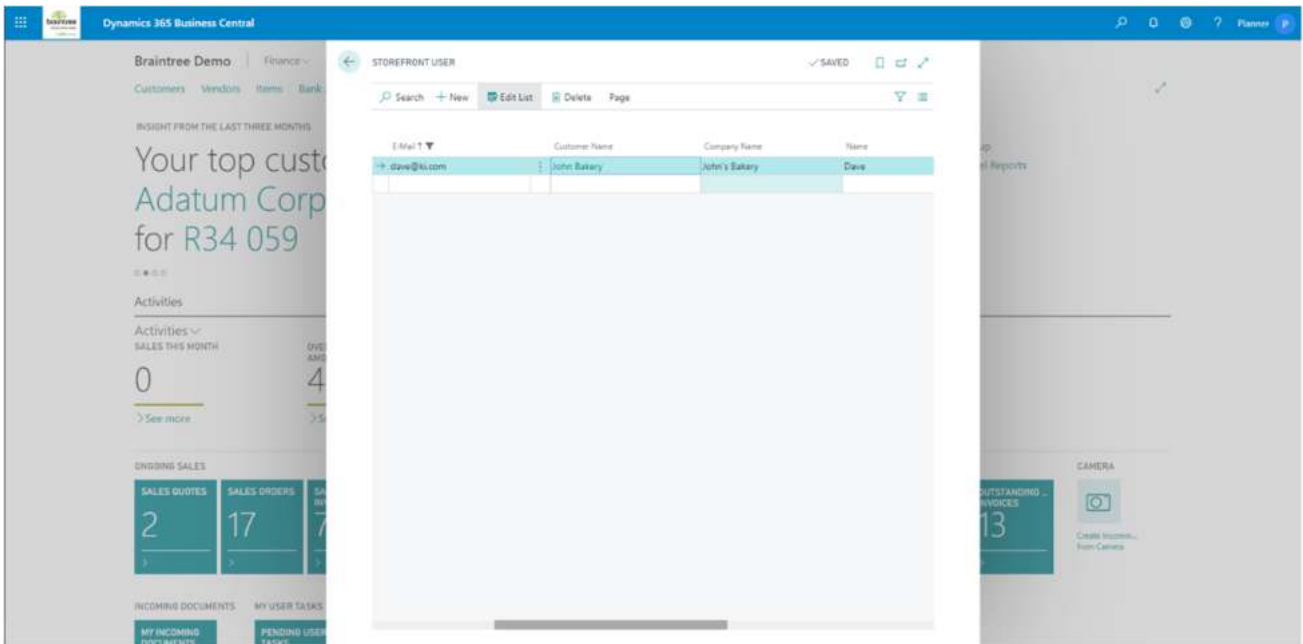
Assumes Business Manager Role

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

Register on the website.

Search & navigate to Storefront Users:

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



Make sure to specify:

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

6.1.1 Disable a Login Account

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

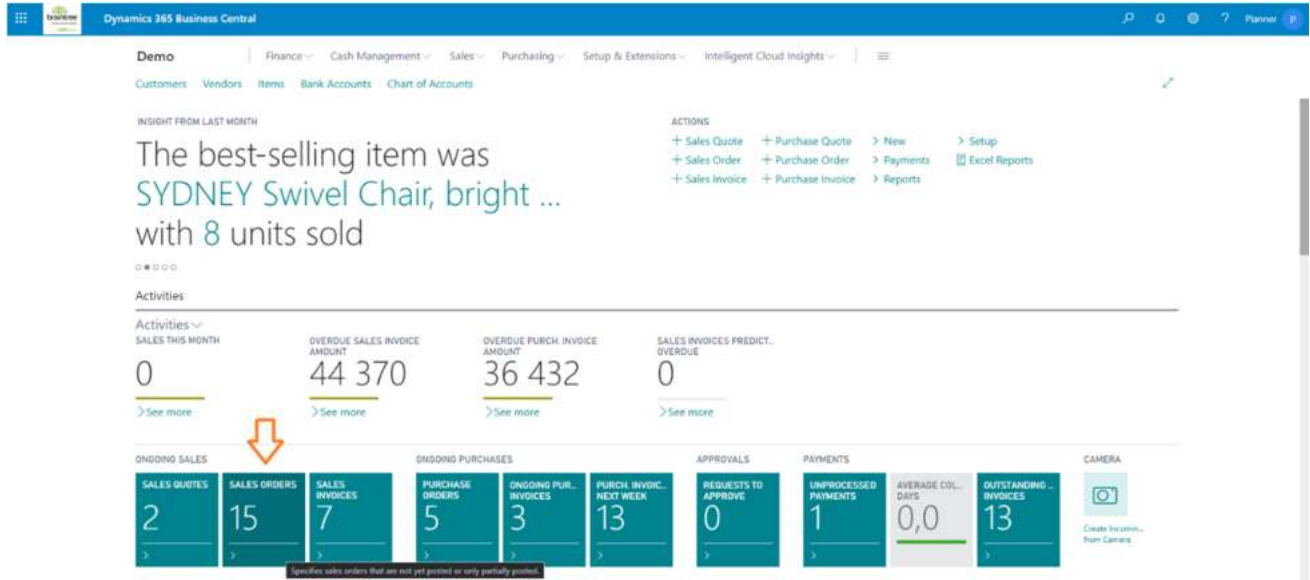
6.1.2 Password Reset

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

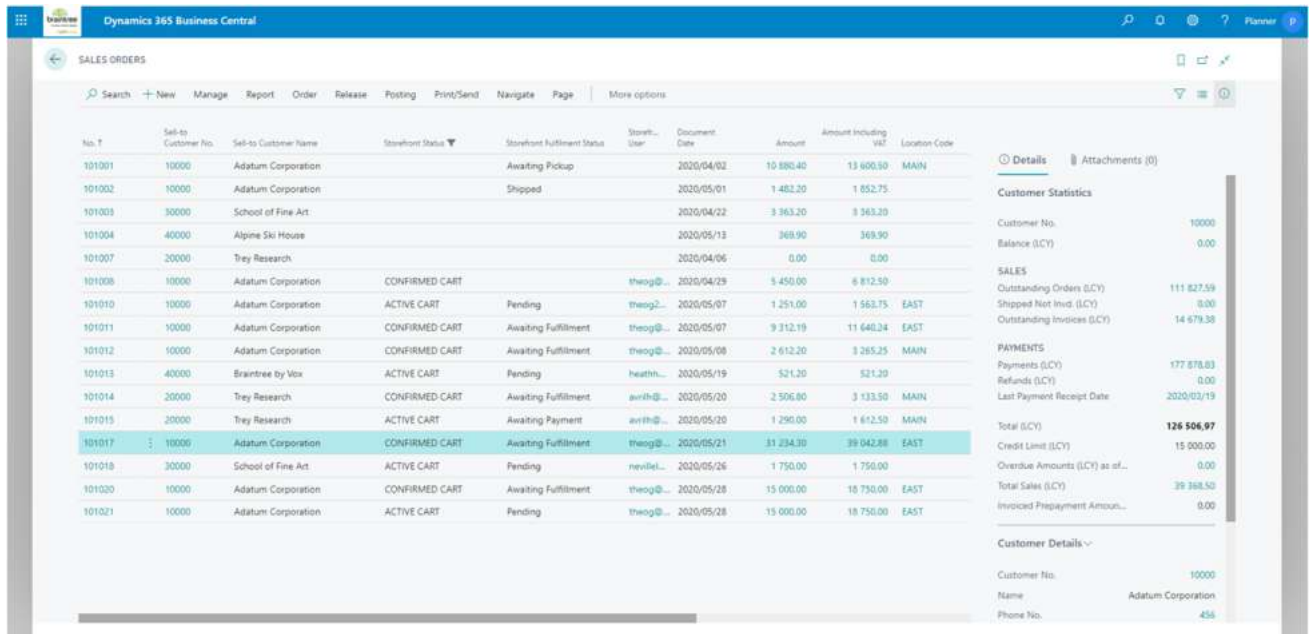
7 Order Processing

Assumes Business Manager Role

Search & navigate to Sales Orders:

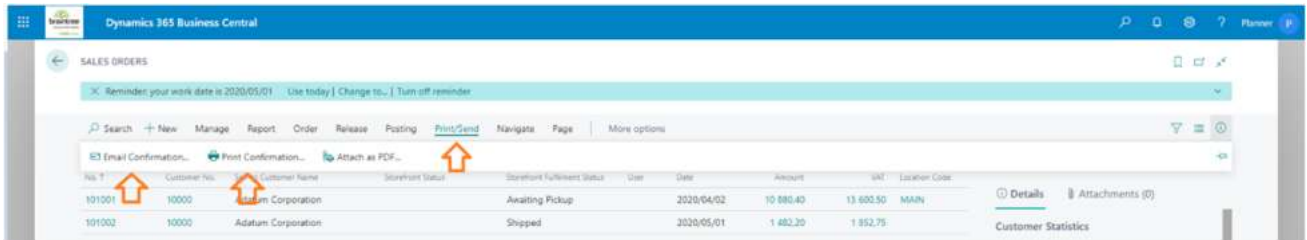


The Sales Orders list show all recent orders and associated Cart and Fulfilment Statuses. Select Manage to edit or view order details.



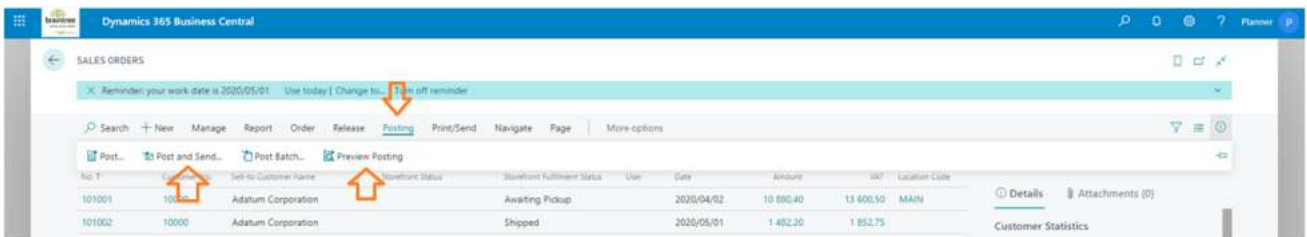
7.1 Send an Order Confirmation

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



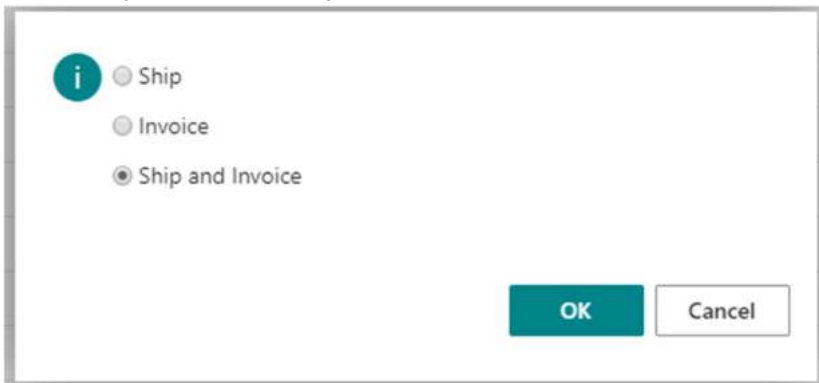
7.2 Process an Order

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

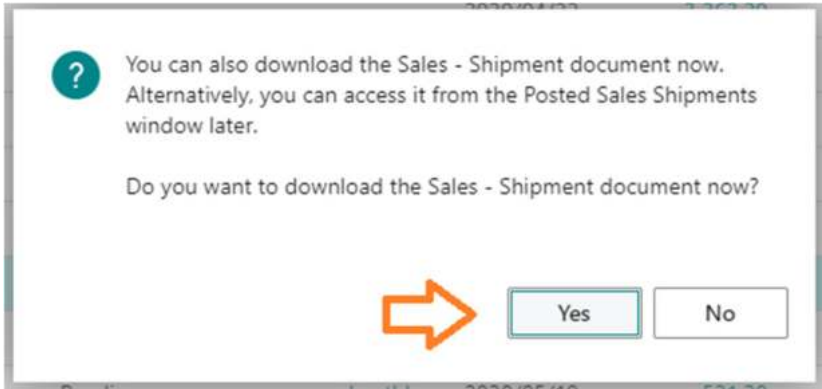


Tip: Use Preview Posting to review your order first.

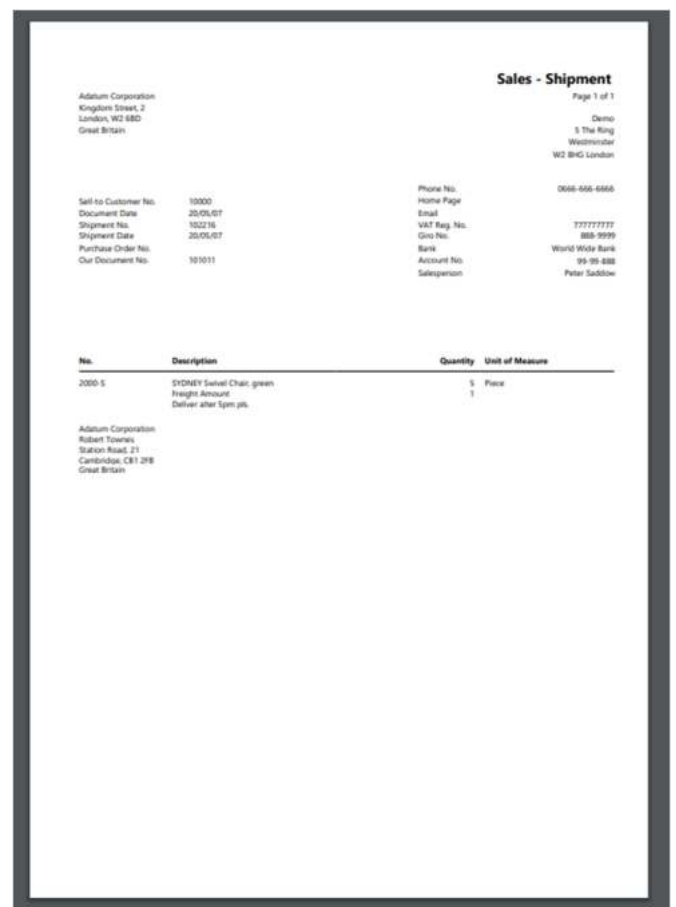
Select Ship and Invoice to process the entire order:



Select Yes to print or download a Shipment Manifest:



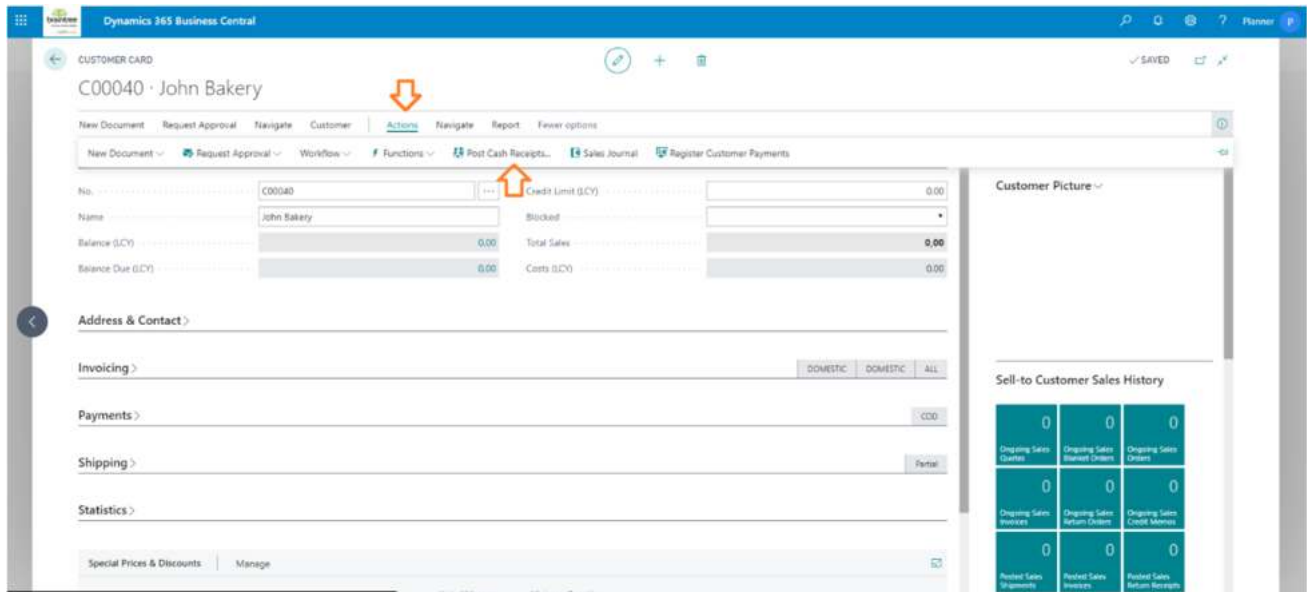
Invoice and Shipment Document Templates:



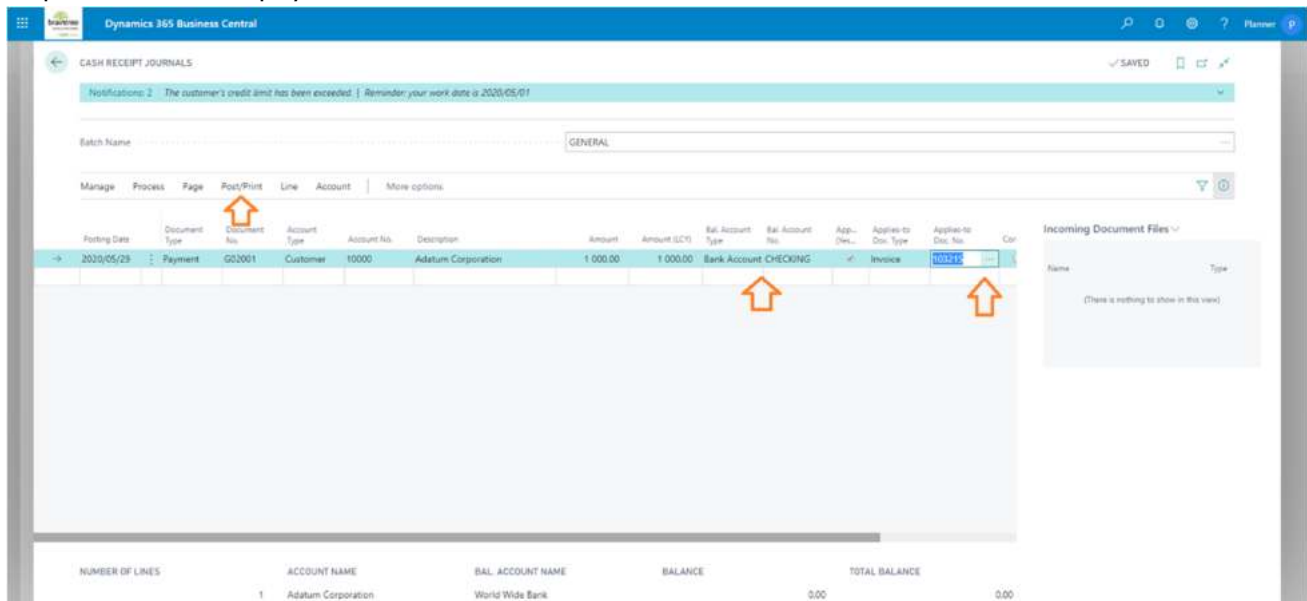
A built-in Microsoft Word report designer is available to change report & document layouts.

7.3 Process a Payment

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



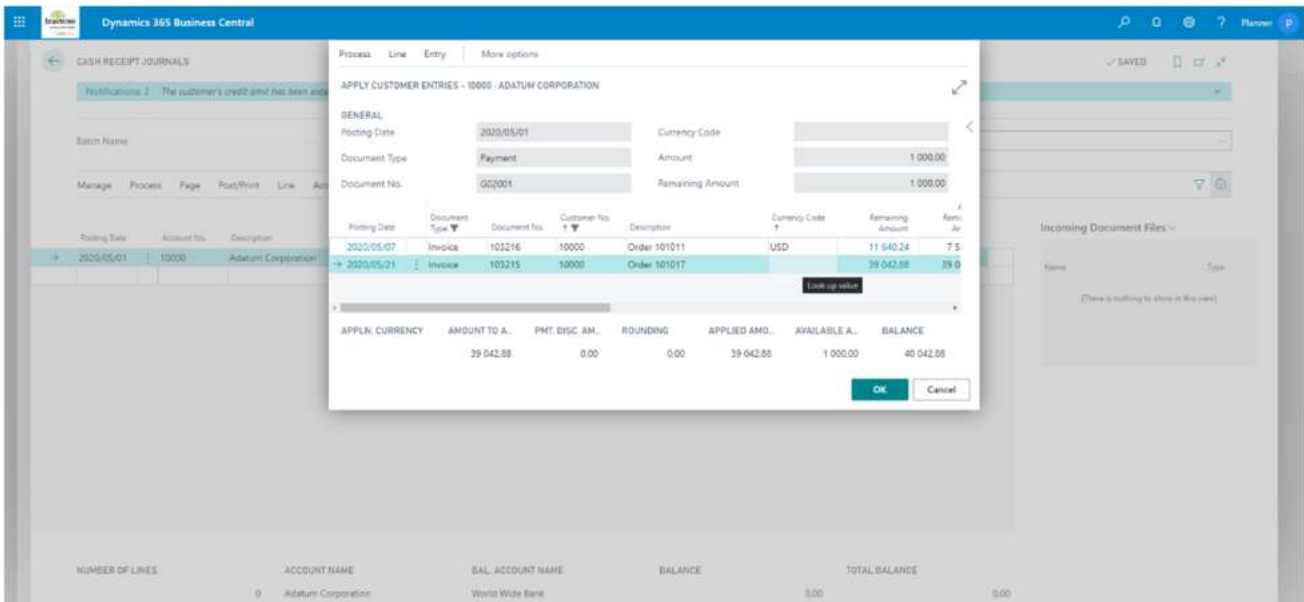
Capture a customer payment:



Make sure to specify:

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

- Bal. Account: Bank
- Bal. Account No.: Your Bank Account Card
- Applies to Doc. Type: Invoice
- Applies-to Doc. No.: Drilldown to select the order invoice that the payment applies to:



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



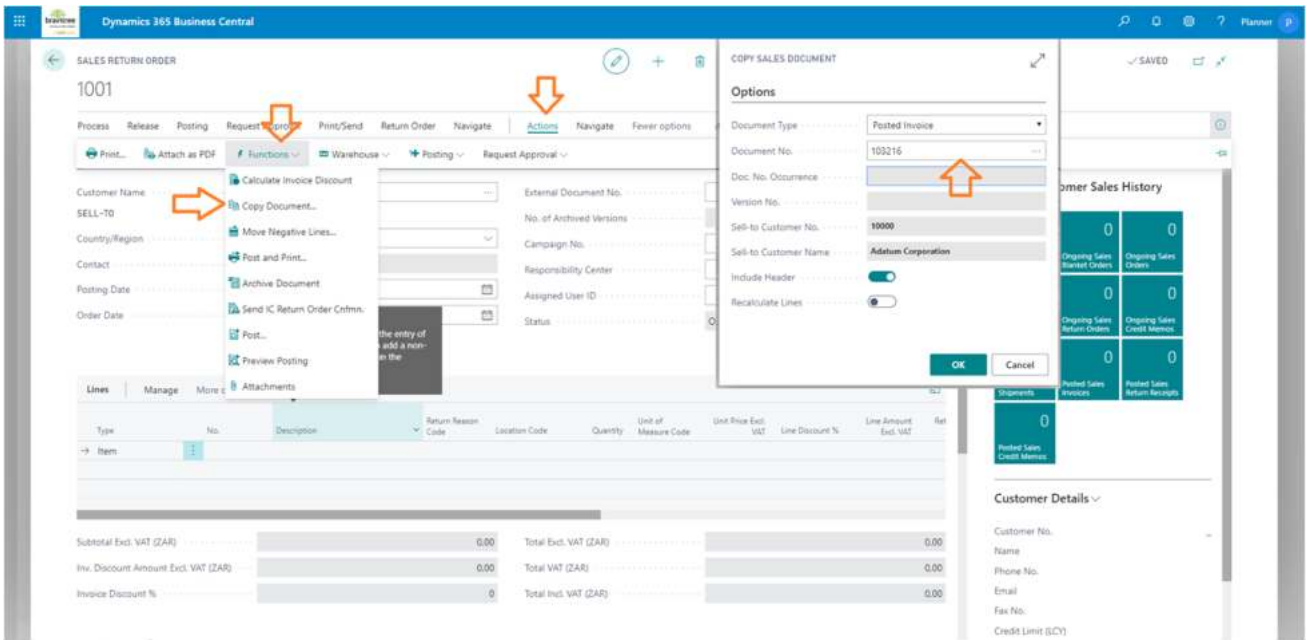
Tip: Use Preview Posting to review posting first.

7.4 Process a Return

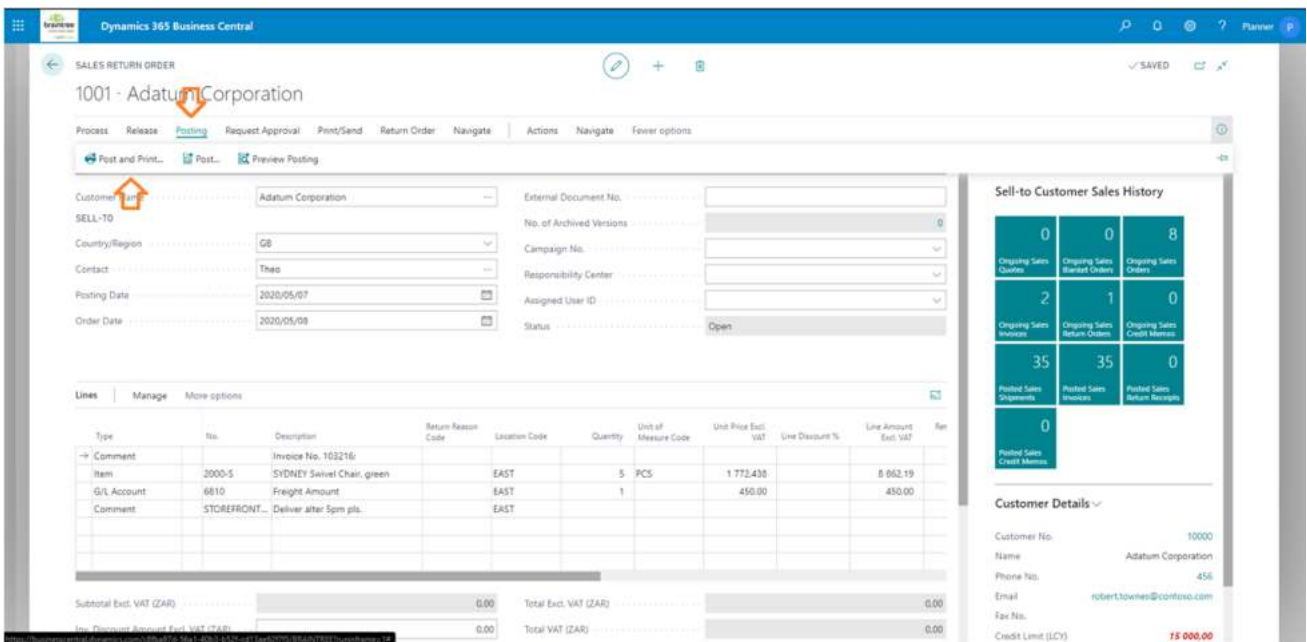
Search & navigate to Sales Return Orders.

Select New to create a new return.

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




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



Tip: Use Preview Posting to review your order first.

8 Content Management

8.1 Self Service

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

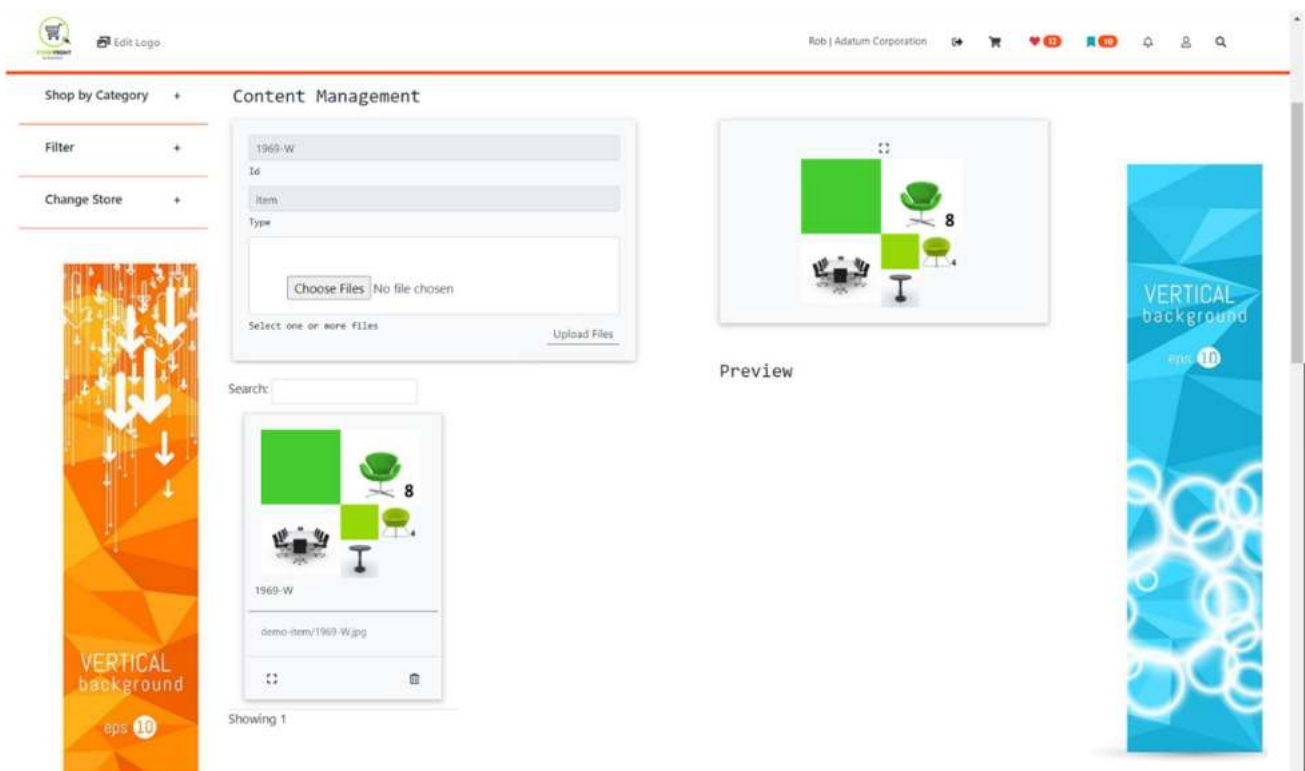
The following content can be edited:

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

Supported content:

- Images
- Videos
- Files

Multiple files can be uploaded at the same time.



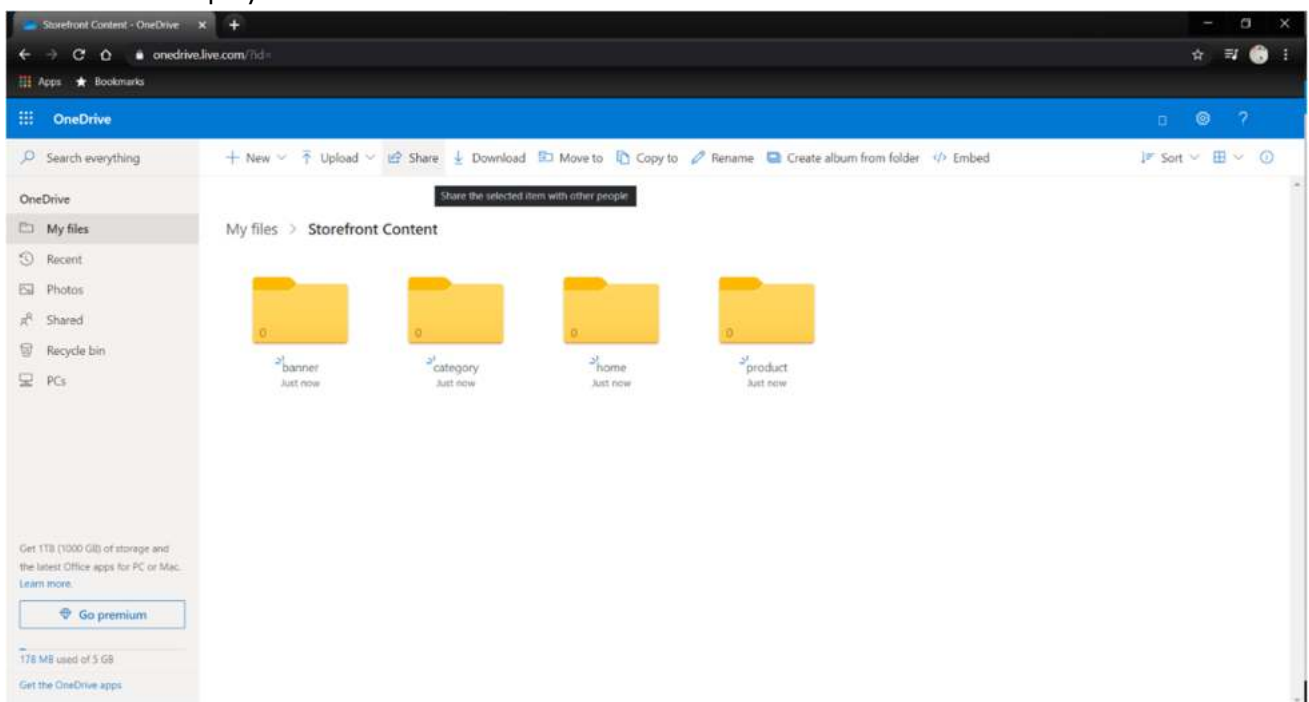
The screenshot displays the Braintree Content Management interface. On the left, there is a sidebar with navigation options: 'Shop by Category', 'Filter', and 'Change Store'. The main content area is titled 'Content Management' and features a search bar, a file upload section with a 'Choose Files' button and 'No file chosen' text, and a preview area. The preview area shows a vertical banner with a blue background and white circles, and a product image with a green background and a chair. The interface also includes a top navigation bar with the Braintree logo and 'Edit Logo' button, and a user profile section with the name 'Rob | Adatum Corporation' and various icons for shopping cart, notifications, and user settings.

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@voxtelcom.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 displays the 'JOB QUEUE ENTRY CARD' for 'Codeunit · 73501 · EcommerceMgtKI'. The interface includes a navigation bar with 'Process', 'Report', 'Actions', 'Navigate', and 'Fewer options'. Below this, there are action buttons: 'Set Status to Ready', 'Set On Hold', 'Show Error', 'Restart', and 'Log Entries'. The main configuration area is divided into two columns. The left column contains 'Object Type to Run' (Codeunit), 'Object ID to Run' (73501), and 'Object Caption to Run' (EcommerceMgtKI). The right column contains 'Description' (Ecommerce Payments to Jnl), 'Earliest Start Date/Time' (2020/08/29 00:00), and 'Status' (On Hold). Below this, the 'Recurrence' section shows 'Recurring Job' as a toggle switch (turned off) and 'Next Run Date Formula' as '1D'. An orange arrow points to the 'Set Status to Ready' button.

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:



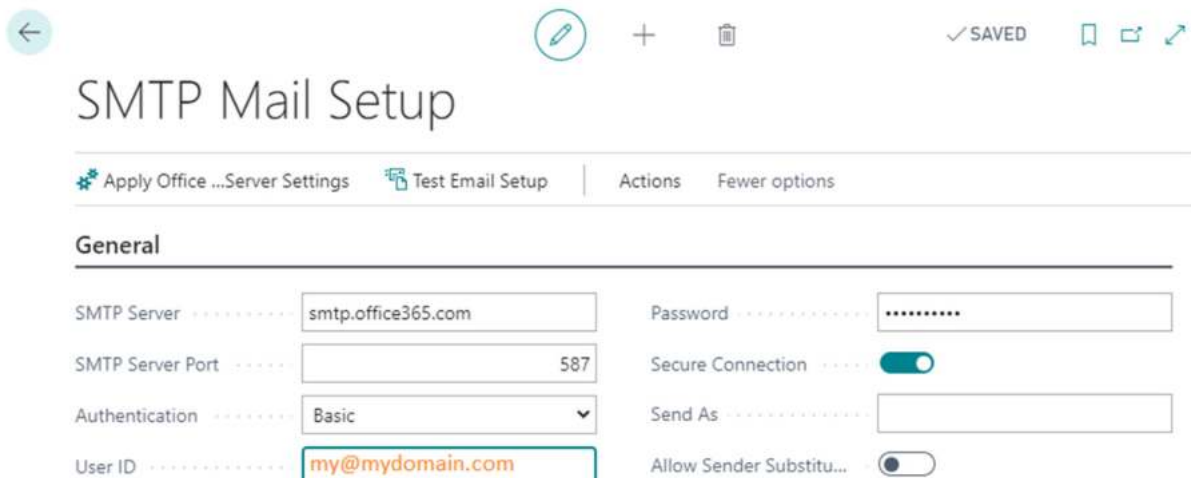
TELL ME WHAT YOU WANT TO DO

smtp

Go to Pages and Tasks Show all (50)

> SMTP Mail Setup Administration

Configure your e-mail account for notifications:



SMTP Mail Setup

Apply Office ...Server Settings Test Email Setup Actions Fewer options

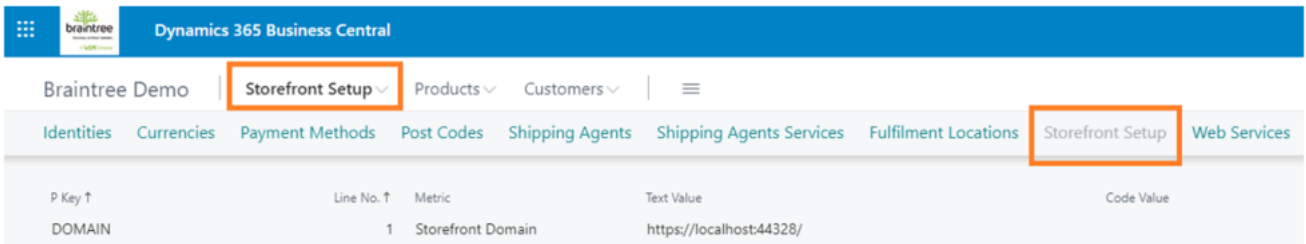
General

SMTP Server	smtp.office365.com	Password
SMTP Server Port	587	Secure Connection	<input checked="" type="checkbox"/>
Authentication	Basic	Send As	
User ID	my@mydomain.com	Allow Sender Substitu...	<input type="checkbox"/>

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

Change your role to Storefront

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



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

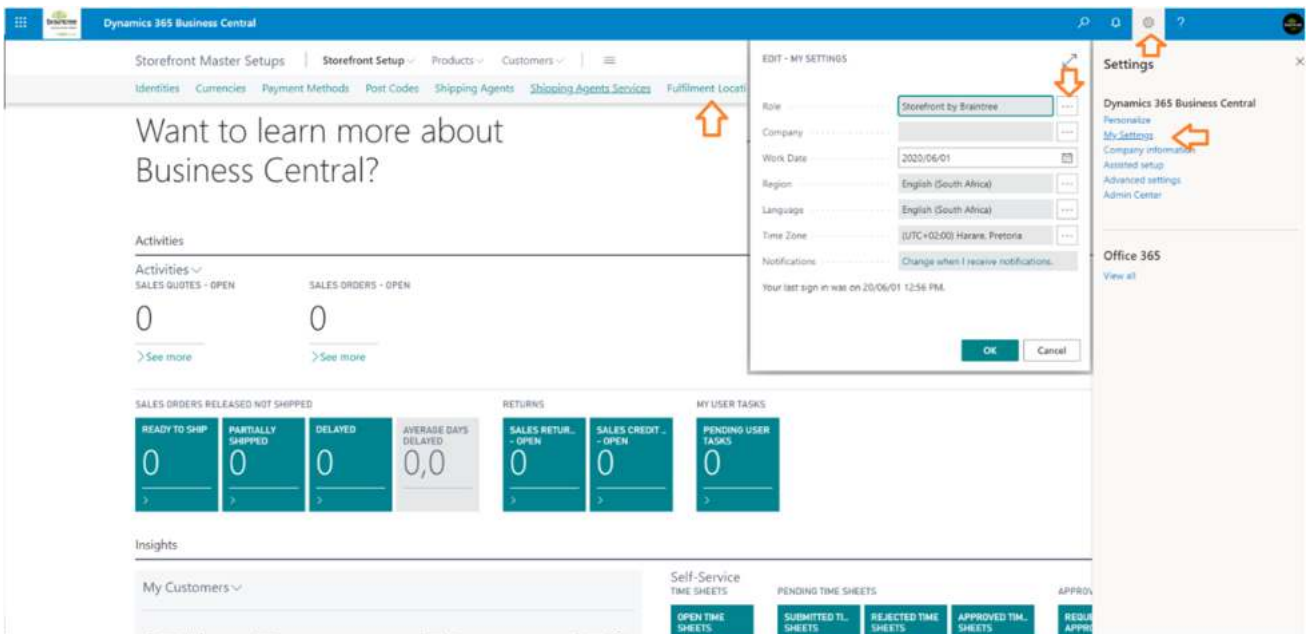
- Example:

P Key: DOMAIN

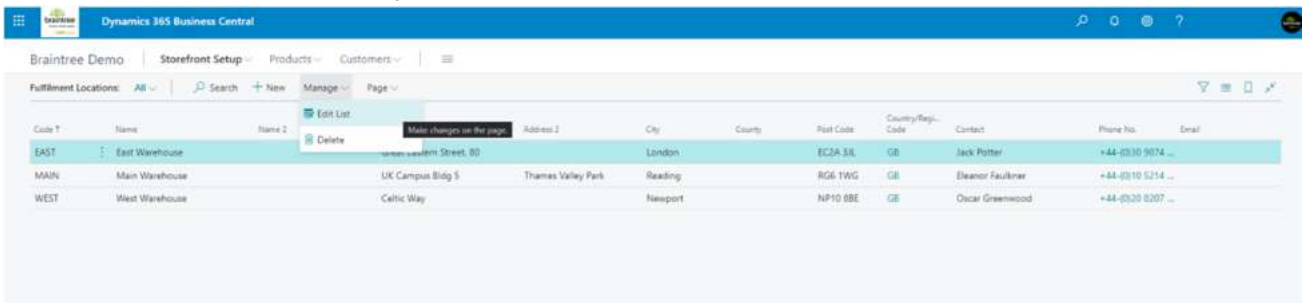
Text Value: <http://my-ecommerce-store.com/>

10.4 Add a Click & Collect Location

Change your role to Storefront:



Select **Storefront Setup**, then **Fulfilment Locations** to edit locations:



10.5 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:

The screenshot shows the Dynamics 365 Business Central interface. The top ribbon includes 'Search', '+ New', 'Manage', 'Process', 'Report', 'New Document', 'Customer', 'Navigate', 'Page', 'Actions', 'Navigate', 'Report', 'SmartList', and 'Fewer options'. The left-hand navigation pane is open, showing 'Customers' with a sub-menu where 'Ship-to Addresses' is selected. The main area displays a table of customer records with columns for Name, Location, and various financial metrics. A tooltip for 'Ship-to Addresses' reads: 'View or add alternate shipping addresses where the customer wants items delivered if different from the regular address.'

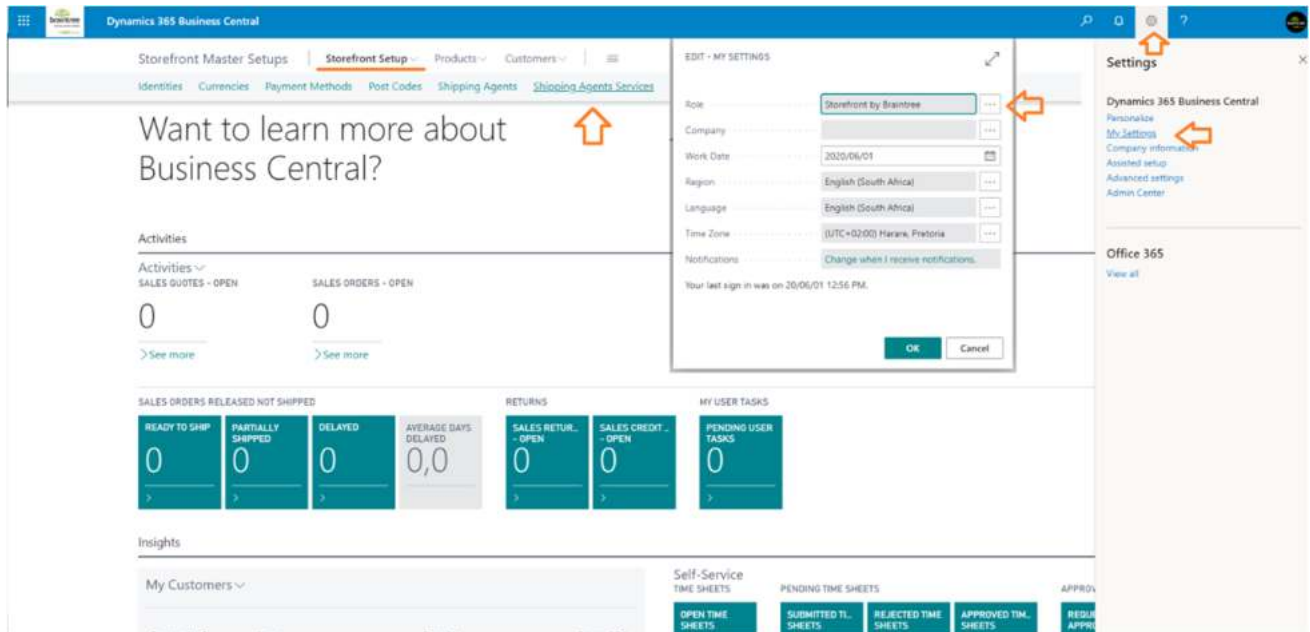
Edit the customer's Ship-to Addresses:

The screenshot shows the 'Ship-to Address List' for customer '10000 - ADATUM CORPORATION'. The top ribbon includes 'Ship-to Address List', 'Search', '+ New', 'Manage', 'Page', and 'More options'. The action bar above the list includes 'Edit', 'View', and 'Delete'. The list contains three entries:

Address	Customer	Location
CHELTENHAM	Adatum Corporation	Cheltenham
LONDON	Adatum Corporation	London
LONDOO	Adatum Corporation	Wien

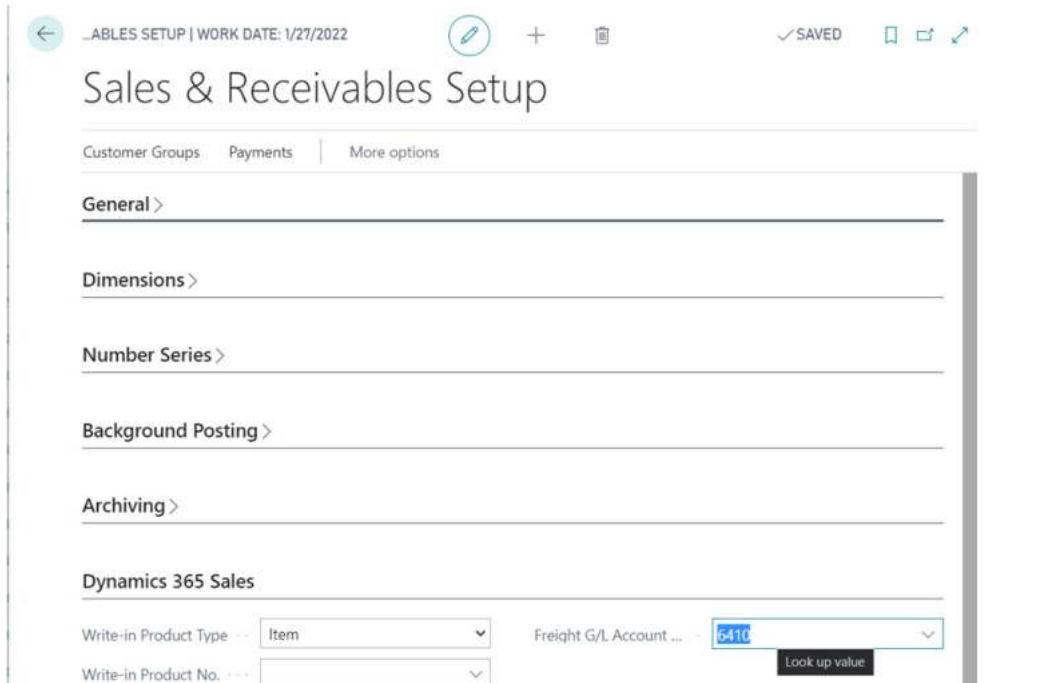
10.6 Add a Shipping Provider & Charge

Change your role to Storefront:



Search & navigate to Sales & Receivables Setup.

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



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

Remember to specify shipping lead times and associated costs:

← SHIPPING AGENTS SERVICES ✓ SAVED

Search + New Edit List Delete Page

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

10.7 Setup

Edit - AnalyticsKI

HOME ACTIONS

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

AnalyticsKI

Show results:

Where P Key is Enter a value.

Add Filter

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

Edit - VoucherKI

HOME

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

VoucherKI

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

10.8 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.