Tilted Channels

Channel reference: setting up and running each channel

Version 1.0 · October 2026 · Applies to the Channels addon for Sage 200, version 25.1.26.608. Read with the **Channels – Operator Guide**, which describes the screens and processes every channel shares.

	Channel	Type
1	Using this reference	
2	Amazon Seller	Marketplace
3	Amazon Direct Fulfillment	Retailer drop-ship
4	Shopify	Web store / B2B (SparkLayer)
5	WooCommerce	Web store
6	Magento	Web store
7	SquareSpace	Web store
8	CS-Cart	Web store
9	eBay	Marketplace
10	Etsy	Marketplace
11	Temu	Marketplace
12	Mirakl	Marketplace platform
13	Marketplacer	Marketplace platform
14	ManoMano	Marketplace
15	Wowcher	Deals site
16	Groupon	Deals site
17	Kornit	Print on demand
18	Not on the High Street	Marketplace
19	ConnectWise	Business system
20	Channel Advisor	Multichannel platform
21	ChannelEngine	Multichannel platform
22	StoreFeeder	Multichannel platform
23	Virtual Stock	Retailer drop-ship
24	Very	Retailer drop-ship
25	Wayfair	Retailer drop-ship
26	Dunelm	Retailer drop-ship
27	The Range	Retailer drop-ship
28	EDI	Trading partners
29	Text & Excel Files	File import / export
30	Third Party Logistics	Outsourced warehouse
31	Messages by channel	

1. Using this reference

Each chapter covers one channel type – one folder on the **Channels** menu (under **Accounting System**) – and every chapter has the same shape. In chapter n:

Section	What it covers
n.1 **What it does**	What the channel exchanges with the marketplace, web store, partner or warehouse. Where something has to be arranged with the other side first, a **Before you start** list follows.
n.2 **Setting it up**	The channel's own pages of the connection wizard (**Channels** ▸ **Channel List** ▸ **Add**, then choose the channel). Every wizard ends with the **Customisation** page, whose options and mappings are described once in the Operator Guide, sections 4 and 5.

Section	What it covers
n.3 **Screens**	The entries in the channel's menu folder, **Channels** ▸ **<channel folder>** ▸ **<item>**, and what is particular to this channel on the shared order, shipment, invoice and inventory lists (Operator Guide, sections 6, 11 and 13).
n.4 **Automations**	The automations the channel offers to job bags (Operator Guide, section 15).
Orders, **Inventory**, **Shipments**	What is particular to this channel: which orders are downloaded, the default mappings, how stock is sent and how despatches (and, for some channels, invoices) are confirmed. Where a channel exchanges no stock or shipments, that section is left out or says so. How orders are converted, how stock is calculated and how shipments are created is common to every channel and described in the Operator Guide, sections 6, 11 and 13.
Further sections	A few channels have more – for example SparkLayer (Shopify), files and folders (EDI) or the ShipStream connector (Third Party Logistics).
Points to note	Always last: limits and choices worth knowing before you go live.

Terms used throughout:

- A **channel** is one connection set up on **Channels** ▸ **Channel List** – for example one Amazon marketplace or one Shopify store.
- A **stored order** is an order Channels has downloaded or received and holds on the channel's **Order List** until it is converted to a Sage sales order (Operator Guide, section 6.1).
- An **export feed** is each acknowledgement, shipment, invoice, stock update or other file or message Channels creates to send to a channel. It is sent from **Channels** ▸ **Export Feeds** or by an upload automation (Operator Guide, chapter 14).
- An **automation** is one task a channel offers, such as **Download new orders**; a **job bag** is a list of automations that runs on a schedule (Operator Guide, chapter 15).

Cross-references such as “Operator Guide, section 6.2” point to the **Channels – Operator Guide**; “section 20.5” or “chapter 30” point to this reference. On-screen captions are shown in **bold** exactly as they appear on screen. Chapter 31 lists the messages each channel can show.

Credentials, store addresses and account numbers shown in this reference are examples.

> **Important:** Most channels act on the live marketplace or system as soon as you download, upload or confirm. Use the channel's test or sandbox account where one exists, and test on a test company first.

2. Amazon Seller

2.1 What it does

The Amazon Seller channel connects Sage 200 to an Amazon Seller Central account through Amazon's Selling Partner API (SP-API). Each channel covers one Seller Central account, one marketplace (for example Amazon.co.uk) and one way of fulfilling orders: either you ship them yourself, or Amazon ships them from its own warehouses. The channel:

- downloads Amazon orders as stored orders, ready to convert to Sage sales orders – either orders you ship yourself (**Merchant Fulfilled**) or orders Amazon ships for you (**Fulfilled by Amazon**, often called FBA);
- on an FBA channel, takes each converted Sage order straight through despatch, invoicing and posting, because Amazon has already sent the goods;
- confirms your despatches to Amazon with the carrier, service and tracking number, so that Amazon marks the order as shipped and tells the buyer;

- sends your free stock and handling time (the number of days you take to despatch) to your Amazon listings;
- collects Amazon's processing report for every shipment and stock export feed, so you can see which orders and SKUs Amazon accepted.

Seller Central does not need orders to be acknowledged and does not take invoices from you, so this channel has no acknowledgement or invoice screens.

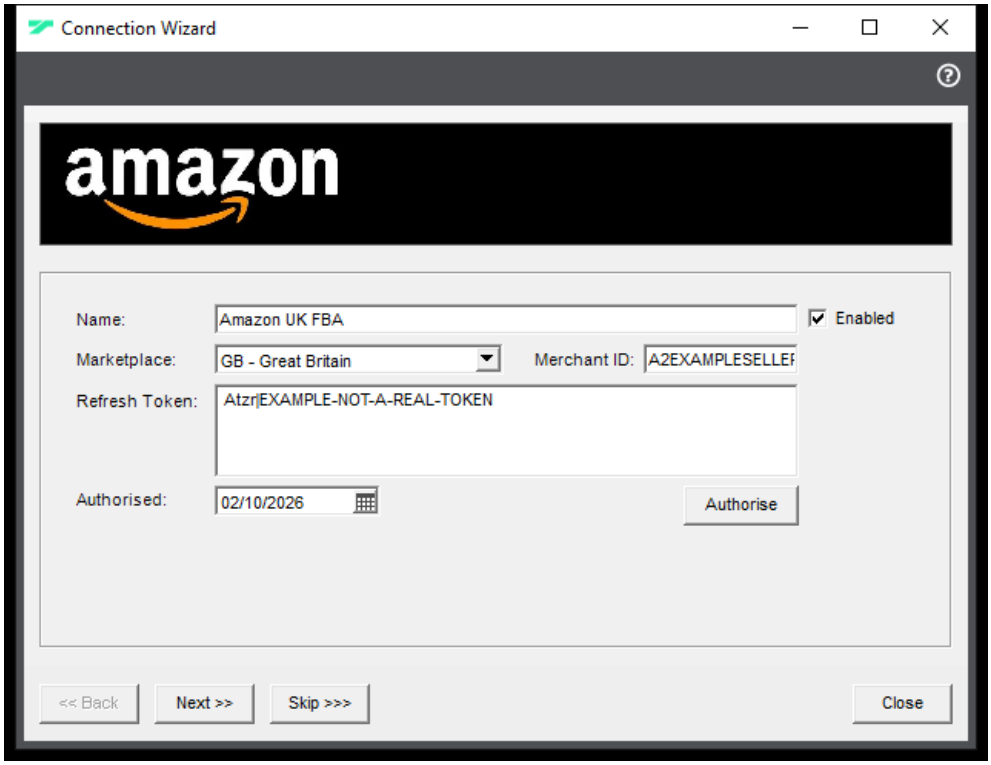
Before you start

- Your Channels licence carries the details of the Tilted Channels application that Amazon has approved. You never enter Amazon developer keys yourself.
- You need a Seller Central login that is allowed to authorise apps (normally the primary account user) and your merchant token, which Seller Central shows under **Settings** ▸ **Account Info**.
- The default mappings put every order on the Sage customer account **Amazon**. Create that customer first, or change the **Customer Account Number** mapping (Operator Guide, section 5.3).
- Create a separate channel for each marketplace you sell on. If you use both FBA and your own despatch, create a separate channel for each, using the same authorisation.

2.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Amazon Seller** (Operator Guide, section 4.2). The wizard has a connection page and an options page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page



Amazon Seller – connection page

Field	What it does
Name:	The name of the channel as it appears on the Channel List, in the order lists and in job bags, for example `Amazon UK`. Required.

Field	What it does
Enabled	Tick to make the channel active. An enabled channel counts towards the number of channels your licence allows.
Marketplace:	The country of the Amazon marketplace this channel serves, for example **GB** for Amazon.co.uk. Available marketplaces: United Kingdom, Germany, France, Italy, Spain, Netherlands, Sweden, Poland, Turkey, Egypt, United Arab Emirates, Saudi Arabia, India, United States, Canada, Mexico, Brazil, Australia, Japan and Singapore. Required.
Merchant ID:	Your Seller Central merchant token, for example `A2EXAMPLESELLER`. Required.
Refresh Token:	The authorisation Amazon issues when you approve Tilted Channels. Paste it here after clicking **Authorise**. Required.
Authorised:	The date the refresh token was entered. It fills itself in.
Authorise	Opens Seller Central for the chosen marketplace in your web browser so you can approve Tilted Channels. Choose the **Marketplace:** first.

To authorise the channel:

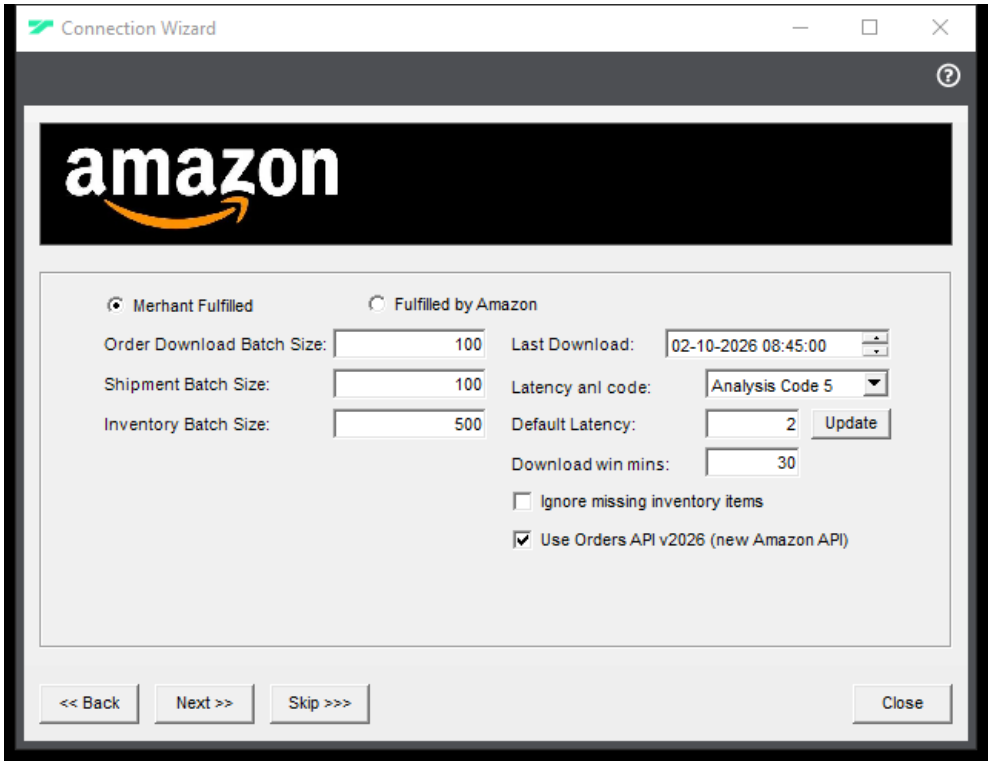
1. Enter the **Name:**, choose the **Marketplace:** and type your **Merchant ID:**.
2. Click **Authorise**. Seller Central opens in your web browser.
3. Sign in and approve Tilted Channels. Accept every permission it asks for, including access to buyer delivery details. Without that permission, orders arrive with no delivery address.
4. Amazon returns you to a Tilted Software page headed “Amazon SP-API Connected”. Click **Copy Token**.
5. Back in the wizard, paste the token into **Refresh Token:**, then click **Next >>**.

> Complete the Amazon sign-in within five minutes of clicking **Authorise**. If the page shows “Authorisation Failed”, close it and click **Authorise** again. Do not refresh the Tilted page once the token appears, because that cancels it and you have to start again.
>
> The wizard does not test the connection. The first download after you finish the wizard confirms that it works. Amazon asks sellers to renew app authorisations from time to time. When it does, edit the channel and repeat the steps above.

Channels created before SP-API

A channel set up with Amazon's older interface (MWS) opens a different connection page with **End Point:**, **Marketplace:**, **Merchant ID:**, **Auth Token:**, **Access Key:** and **Secret Key:**. Amazon no longer supports that interface. Click **Switch to SP-API**, and the message “Click Next until this wizard closes and then you will need to amend this channel again to authorise SP-API” appears. Finish the wizard, then edit the channel again and authorise it as described above.

Options page



Amazon Seller – options page

Field	What it does
Merchant Fulfilled / Fulfilled by Amazon	Which orders this channel downloads. **Merchant Fulfilled** (the default) downloads orders you despatch yourself. **Fulfilled by Amazon** downloads FBA orders and completes them in Sage automatically.
Shipment Batch Size:	The largest number of despatches put into one shipment confirmation export feed, for example 100. Must be greater than zero.
Last Download:	The date and time the last **New orders** download ran. The next one starts from here. It moves forward automatically, so change it only to look further back.
Latency anl code:	The stock item analysis code that holds each item's handling time, as a whole number of days.
Default Latency:	The handling time in days sent for items whose latency analysis code is blank, and for bundles, for example 2. Required.
Update	Writes the **Default Latency:** into the latency analysis code of every stock item in Sage. See the warning below.
Download win mins:	How many minutes each **New orders** download looks back before **Last Download:**, so nothing is missed between runs. The default is 30.
Ignore missing inventory items	Applies to the older style of inventory list only (see section 2.6). Leaves out Amazon SKUs that match no Sage stock item, alias or bundle, instead of listing them with no stock.
Use Orders API v2026 (new Amazon API)	Switches the channel to Amazon's new order interface, which replaces the current one on 27 March 2027. Downloaded orders, mappings and Sage orders are the same either way. Available only on channels connected through SP-API.

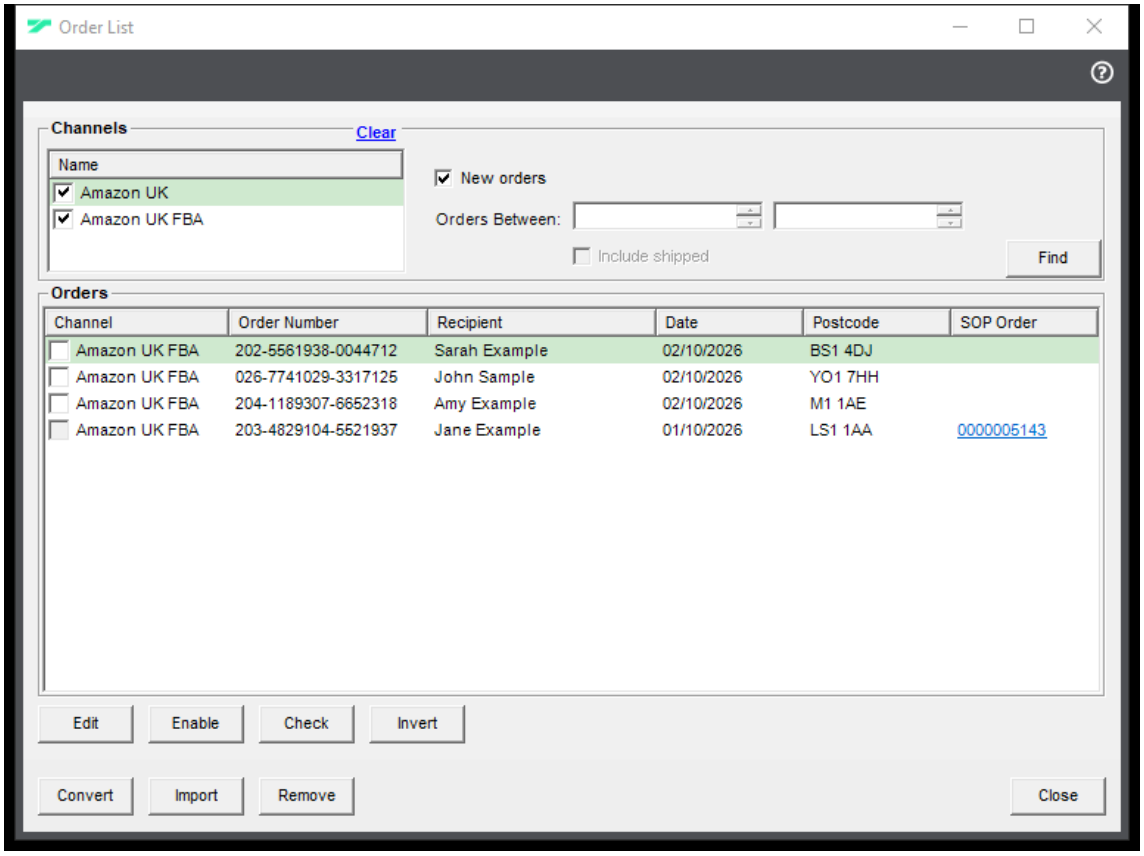
Important: **Update** overwrites the latency analysis code on every stock item in the company, including items that already have their own handling time. Nothing asks you to confirm. After it finishes you see "Latency has been updated on all items" – send a full inventory feed so Amazon receives the new values.

Tilted switches each channel to **Use Orders API v2026 (new Amazon API)** after checking a sample of its orders against the current interface. Please talk to us before you change it yourself.

2.3 Screens

Channels ▸ **Amazon Seller** has four entries: **Order List**, **Shipment List**, **Inventory List** and **Feed Response List**. Opening a screen only reads Sage. Channels contacts Amazon only when you click the buttons noted below.

Order List



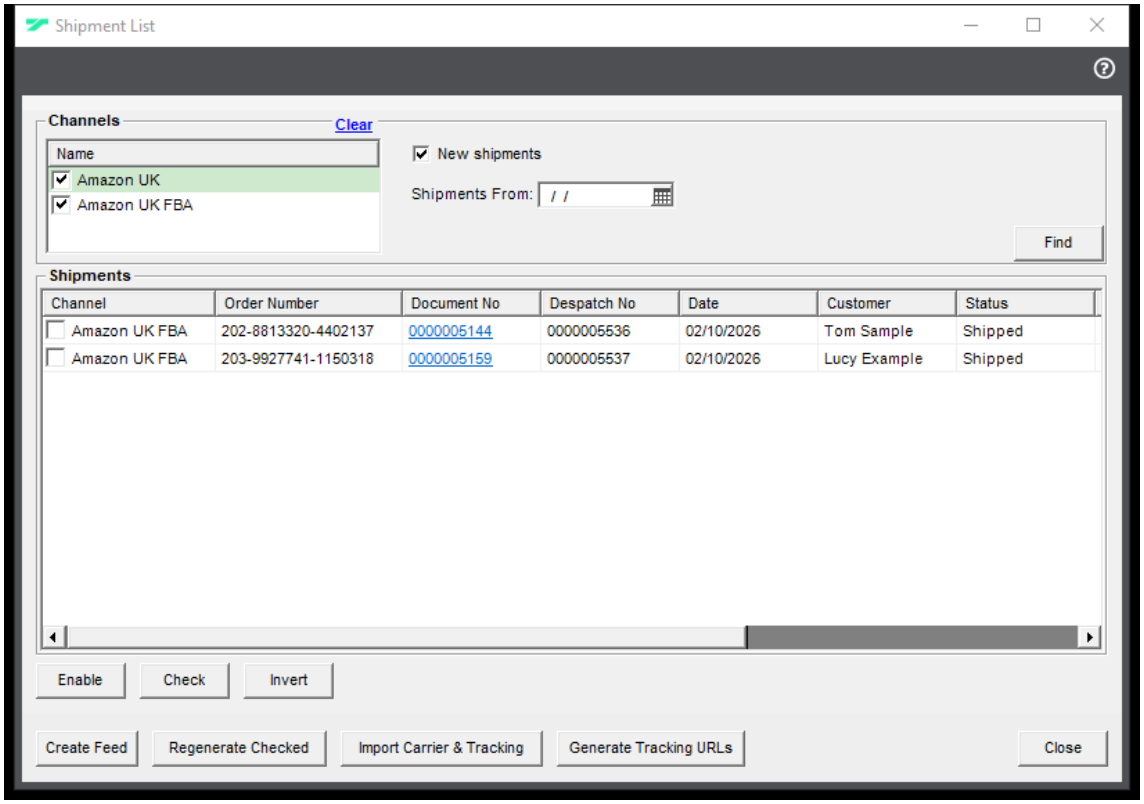
Amazon Seller – Order List

The shared order list (Operator Guide, sections 6.2 to 6.5), with these search options:

Field	What it does
New orders	Ticked when the screen opens. **Find** downloads orders created since the channel's **Last Download:** time (less the download window), then moves **Last Download:** forward.
Orders Between:	Untick **New orders** and enter a from and to date and time to download the orders created in that period. Use this to fetch older orders again.
Include shipped	Available with **Orders Between:**. Also downloads orders Amazon already shows as shipped.

Find contacts Amazon and shows its progress page by page. Downloaded orders join the stored orders already in the list. **Convert** converts the ticked orders to Sage sales orders.

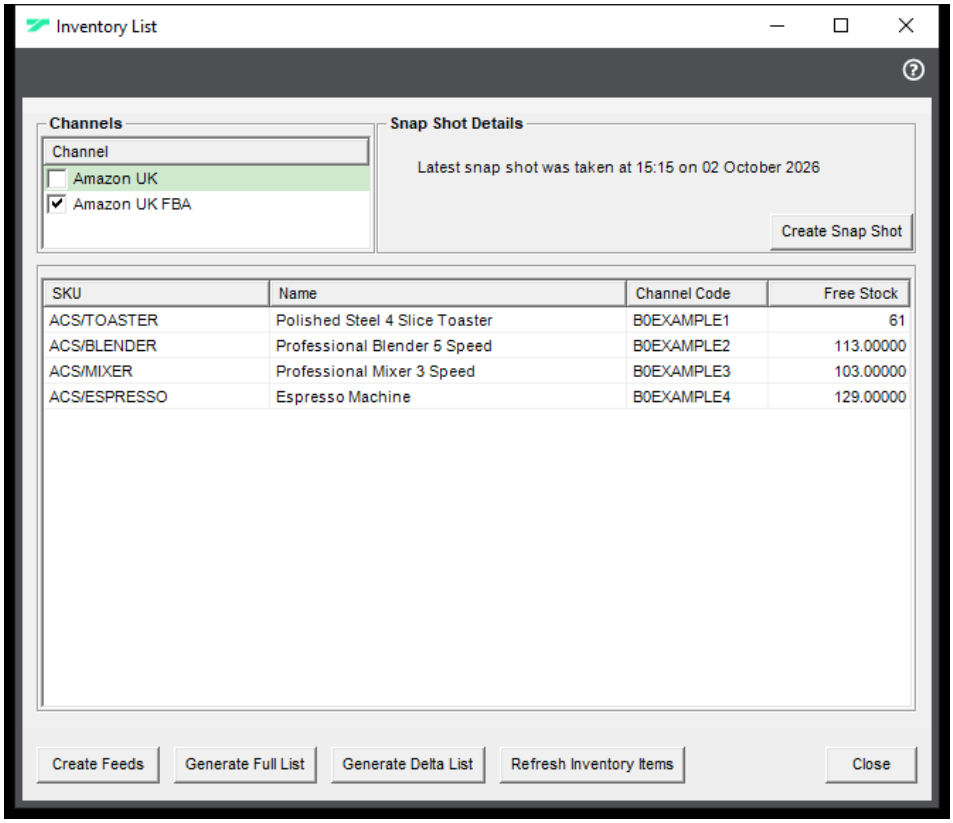
Shipment List



Amazon Seller – Shipment List

The shared shipment list (Operator Guide, section 13.3), with an extra **Service** column. Amazon shows the carrier service to the buyer, for example `Tracked 24`, so check **Courier**, **Service** and **Tracking** before you create the export feed. **Create Feed** creates a shipment confirmation export feed for the ticked despatches and reports "… feeds have been successfully generated." The feed reaches Amazon when it is submitted from **Channels** ▸ **Export Feeds** or sent by the **Upload shipment feeds** automation (Operator Guide, section 14).

Inventory List

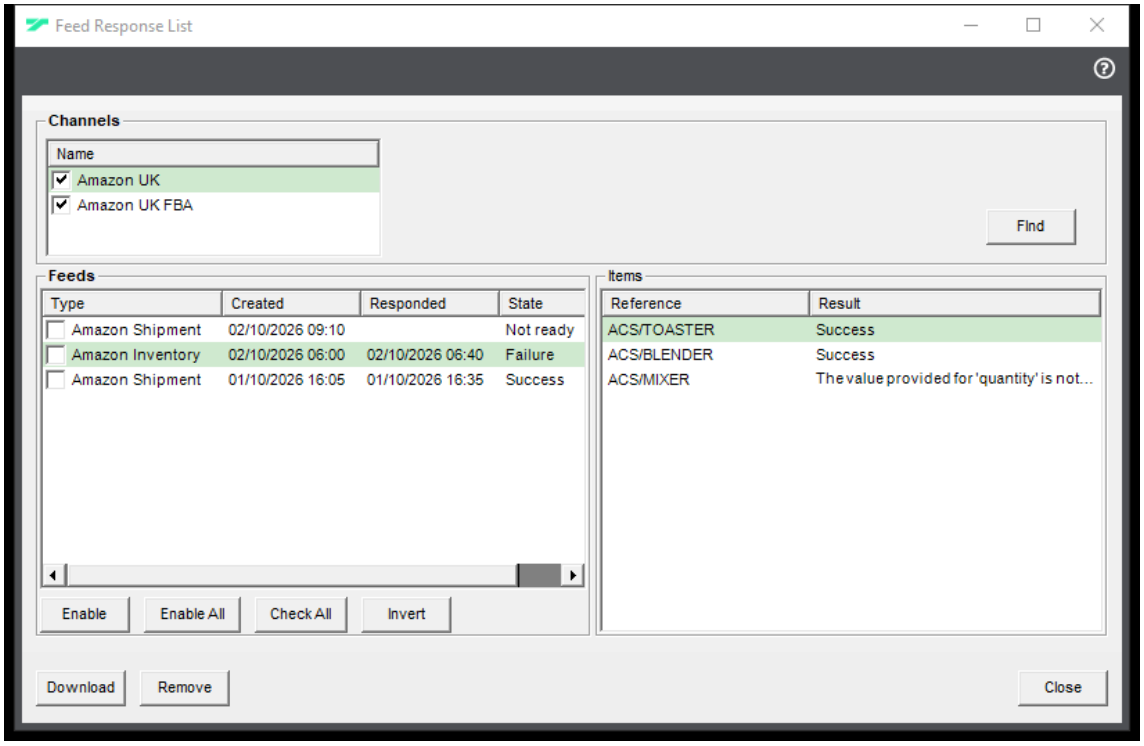


Amazon Seller – Inventory List

The shared inventory list (Operator Guide, section 11.6). Whether you see the current or the older style of list depends on how Channels is set up for your company.

- **Refresh Inventory Items** asks Amazon for your open listings report and saves every listed SKU with its ASIN as this channel's inventory items. Amazon can take several minutes to produce the report, and progress is shown while you wait.
- With the current style of list, **Generate Full List** and **Generate Delta List** work from Sage alone. **Create Feeds** on a full list first fetches the listings report again, so only SKUs that are actually listed on Amazon are sent.
- With the older style of list, the grid adds an **ASIN** column and the **Upload All** box, and the list is built for one channel at a time from the listings report.

Feed Response List



Amazon Seller – Feed Response List

Each time a shipment or stock export feed is sent, Amazon gives it a submission number and processes it a few minutes later. This screen lists those submissions for the channels ticked under **Channels**, newest first.

Column	What it shows
Type	**Amazon Shipment** or **Amazon Inventory**.
Created	When the export feed was sent to Amazon.
Responded	When Amazon's processing report was downloaded.
State	"Not ready" until the report has been downloaded, then "Success" if Amazon accepted every message or "Failure" if it rejected any.

Double-click a row to fill the **Items** grid with one row per order (**Reference** is the Amazon order number) or per SKU, and Amazon's **Result** for each – "Success" or Amazon's reason for rejecting it.

Button	What it does
Find	Refreshes the list for the ticked channels.
Enable / **Enable All**	Lets the focused row, or every row, be ticked.
Check All / **Invert**	Ticks every row, or reverses the ticks.
Download	Contacts Amazon and downloads the processing report for each ticked row. Tick at least one row first.
Remove	Deletes the ticked rows from Sage after you confirm. Nothing changes at Amazon.
Close	Closes the screen.

> The **Download feed results** automation does the same as **Download** for every submission still waiting. It also removes rows more than a month old.

2.4 Automations

Add these to a job bag (Operator Guide, section 15.4). An automation does nothing while the channel is disabled.

Automation	What it does
Download new orders	Downloads orders created since the last run. On an FBA channel it includes orders Amazon has already shipped.
Download last 3 days orders	Downloads every order created in the last 3 days. An order that is already a stored order is not stored twice, and **Process orders** discards any that are already in Sage.
Download last 7 days orders	As above, for 7 days.
Download last 28 days orders	As above, for 28 days.
Download last 35 days orders	As above, for 35 days.
Process orders	Removes any stored order that is already in Sage, then converts the rest to Sage sales orders.
Generate Tracking URLs	Builds tracking links for despatches not yet confirmed to Amazon (Operator Guide, section 13.4).
Create shipment feeds	Creates shipment confirmation export feeds for despatches whose required shipment details are complete.
Upload shipment feeds	Sends the shipment export feeds to Amazon.
Download inventory items	Same as **Refresh Inventory Items**: saves the SKUs listed on Amazon.
Create inventory snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed	Creates a stock export feed for items whose stock has changed. Skipped while inventory feeds are paused (Operator Guide, section 11.2).
Create full inventory feed	Creates a stock export feed for every listed item. Skipped while inventory feeds are paused.
Upload inventory feed	Sends the stock export feeds to Amazon.
Download feed results	Downloads Amazon's processing reports for submissions still waiting, and tidies up rows on the Feed Response List more than a month old.
Clear Invoiced Delivery Details	Removes buyer delivery details from invoiced orders after the number of days set on the channel's **Channel Options**, as Amazon's data protection policy requires (Operator Guide, sections 5.1 and 15.4).

> A typical job bag runs **Download new orders**, **Process orders**, **Create shipment feeds** and **Upload shipment feeds** every 15 to 30 minutes. Add **Download last 3 days orders** once a day: an order Amazon holds as pending (for example while payment clears) only becomes available after the **New orders** window has passed it.

2.5 Orders

- A merchant-fulfilled channel downloads orders Amazon shows as **Unshipped**. An FBA channel downloads Amazon-fulfilled orders, including those already shipped. Pending orders (payment not yet taken) and cancelled orders are not downloaded.
- Downloads overlap slightly so that no order is missed. An order is never stored twice, and **Process orders** discards stored orders that are already in Sage.
- A line the buyer asked to cancel before download is left out. If every line has been cancelled, the order cannot be converted and shows “There are no lines waiting to be converted, this order may have been cancelled.”
- Amazon prices in the UK and Europe include VAT, so the **Tax Inclusive** mapping is **true**. The unit price sent to Sage is Amazon's item price less any promotional discount. Postage charged to the buyer, less any postage discount, becomes the order's shipping value.
- The buyer's gift message is mapped to the despatch note comment. Gift wrap requests and Amazon Custom personalisation are downloaded with the order, so you can map them where your staff will see them.
- On an FBA channel, each converted order is allocated, despatched, invoiced and posted straight away, so it never needs a shipment confirmation. Map the **Default Warehouse** to a Sage warehouse

that represents the stock Amazon holds for you. An order that is on hold or not fully allocated is left for you to complete by hand.

- Amazon Seller orders do not need acknowledging. An order the buyer cancels after it has been downloaded is not removed automatically, so cancel it in Sage yourself.

Default mappings

A new channel starts with these mappings. You can change any of them in **Field Mapping** (Operator Guide, section 5.3).

Sage field	Filled from
Customer Account Number	The fixed value `Amazon`.
Customer Document No	AmazonOrderID (the Amazon order number, for example `203-4829104-5521937`).
Payment Value	OrderTotalAmount.
Delivery Name, Address 1, Address 2	ShippingName, ShippingAddressLine1, ShippingAddressLine2.
Delivery Address 3, Delivery City	ShippingCity.
Delivery Address 4	ShippingStateOrRegion.
Delivery Country Code, PostCode, Phone Number	ShippingCountryCode, ShippingPostalCode, ShippingPhone.
Email Address, Contact	BuyerEmail, BuyerName.
Tax Inclusive	The fixed value `true`.
Shipping Value	ShippingValue.
Default Warehouse	The default warehouse on the Settings screen, when one is set.
Item Code, Quantity	SellerSKU, QuantityOrdered.
Unit Price	PromotionalItemPrice.
Despatch Note Comment	GiftMessageText.

You can also map the order's purchase date, status, sales channel, shipping service level, earliest and latest ship and delivery dates, Prime, Business and Premium flags, currency, GiftMessage, GiftWrap and Customisations. On lines, you can map the ASIN, title, item and shipping tax, gift wrap price, promotional discount, item condition and the personalisation text (CustomisationData).

> **Important:** Shipment confirmations identify the order by the Sage order's **Customer Document No**. Keep that mapped to the Amazon order number.

2.6 Inventory

Snapshots, full and delta feeds and pausing feeds work as described in the Operator Guide, sections 11.1 to 11.3. For Amazon:

- The channel's items are the SKUs in your Amazon open listings report, downloaded with **Refresh Inventory Items** or the **Download inventory items** automation. Refresh it whenever you add listings on Amazon.
- Each SKU is sent with its free stock (never less than zero) and its handling time. The handling time comes from the stock item's **Latency anl code:**, or the **Default Latency:** if that is blank or the item is a bundle.
- A full feed includes only SKUs that are currently listed on Amazon. A delta feed includes every item whose stock has moved since the last feed.
- Stock is sent for the merchant-fulfilled offer only. Amazon manages FBA stock itself, so do not schedule inventory feeds on an FBA channel.
- Only quantities and handling times are sent. Prices, titles and new listings are managed in Seller Central.

- With the older style of inventory list, Channels matches each Amazon SKU to Sage by its SKU first and then by its ASIN, so an alias or bundle can carry either code.

2.7 Shipments

- Each Sage despatch becomes one shipment confirmation. It carries the Amazon order number, your despatch note number, the **Courier** (as the carrier name), the **Service** and the first tracking number. The whole order is confirmed, not individual lines.
- Despatches booked on a label bought through Amazon are put into a separate “Amazon shipment report” export feed, which is trashed automatically because Amazon already has the tracking. An export feed that ends up with no despatches is trashed in the same way.
- Shipment export feeds hold up to the **Shipment Batch Size:**. Amazon processes them a few minutes after they are sent. Check the outcome on the **Feed Response List**.

2.8 Points to note

- One channel serves one marketplace and one fulfilment method. Add a channel for each combination you sell through.
- Amazon withdraws its current order interface on 27 March 2027. Every Amazon Seller channel must be using **Use Orders API v2026 (new Amazon API)** by then, so ask Tilted to schedule the switch.
- Amazon expects buyer details to be removed once orders are complete. Keep the **Clear Invoiced Delivery Details** automation in a daily job bag.
- Only the first tracking number of a despatch is sent to Amazon.
- Orders cancelled or changed on Amazon after download, and partly shipped orders, are not updated in Sage.
- Amazon limits how often orders can be requested. Very large date-range downloads can take several minutes while Channels waits for Amazon to allow the next request.

3. Amazon Direct Fulfillment

3.1 What it does

Amazon Direct Fulfillment is Amazon Vendor Central's drop-ship programme. Amazon sells your product to the consumer and sends you a purchase order; you despatch straight to the consumer and invoice Amazon at your agreed cost price. The channel connects Sage 200 to the Vendor Central Direct Fulfillment interface through Amazon's Selling Partner API. It:

- downloads new Direct Fulfillment purchase orders, with the consumer's delivery address, items and cost prices, as stored orders ready to convert to Sage sales orders;
- acknowledges each order to Amazon: either accepted in full, or “Canceled out of stock” when you cannot supply it – and, if you choose, cancels the Sage order;
- confirms each despatch to Amazon;
- submits each Sage invoice to Amazon, addressed to the Amazon company that pays you and including your VAT details;
- sends available stock for the items you supply to Amazon, for each of your Direct Fulfillment warehouses;
- checks the result of every submission and records any rejection against its export feed.

Shipping labels for Direct Fulfillment orders are not produced by this channel. They come from Amazon, through the separate Tilted Amazon add-on if you use it.

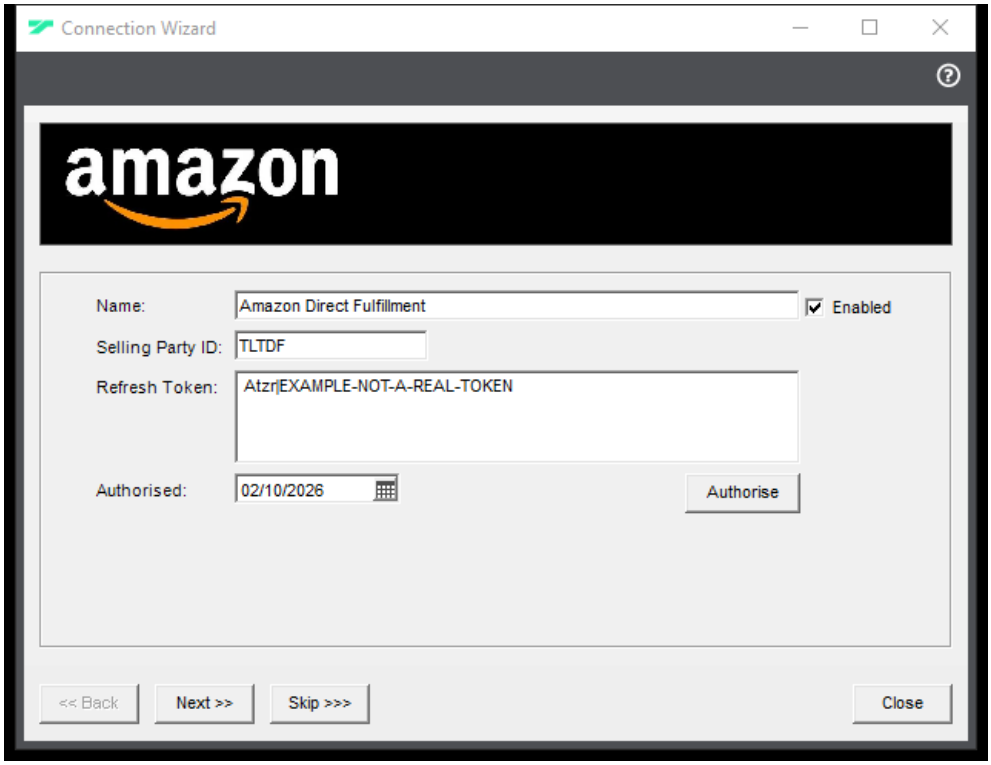
Before you start

- You need a Vendor Central login that is allowed to authorise apps, and your Direct Fulfillment selling party (vendor) code.
- Know the warehouse code Amazon has given each location you ship from.
- Create the Sage customer account **Amazon**, or change the **Customer Account Number** mapping (Operator Guide, section 5.3).
- For stock feeds, create a stock alias group holding the codes Amazon uses for your items and link it to this channel (Operator Guide, section 9.1).

3.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Amazon Direct Fulfillment** (Operator Guide, section 4.2). The wizard has a connection page and an options page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page



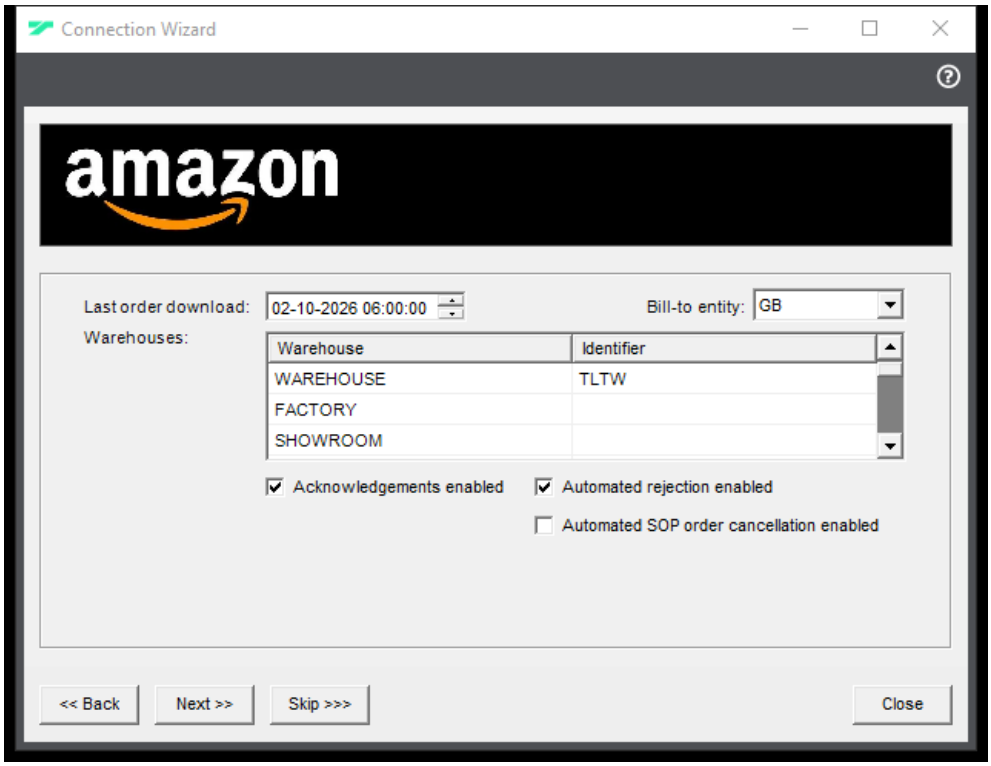
Amazon Direct Fulfillment – connection page

Field	What it does
Name:	The channel name, for example `Amazon Direct Fulfillment`. Required.
Enabled	Tick to make the channel active.
Selling Party ID:	Your Direct Fulfillment vendor code, for example `ABCDE`. It is sent with every acknowledgement, shipment, invoice and stock update. Required.
Refresh Token:	The authorisation Amazon issues when you approve Tilted Channels.
Authorised:	The date the refresh token was entered. It fills itself in.
Authorise	Opens Amazon Vendor Central (UK) in your web browser so you can approve Tilted Channels.

1. Enter the **Name:** and **Selling Party ID:**.
2. Click **Authorise**, sign in to Vendor Central and approve Tilted Channels.
3. On the Tilted Software page headed “Amazon SP-API Connected”, click **Copy Token**.
4. Paste the token into **Refresh Token:** and click **Next >>**.

> Complete the sign-in within five minutes of clicking **Authorise**. If the page shows “Authorisation Failed”, click **Authorise** again. The channel connects to Amazon's European service.

Options page



Amazon Direct Fulfillment – options page

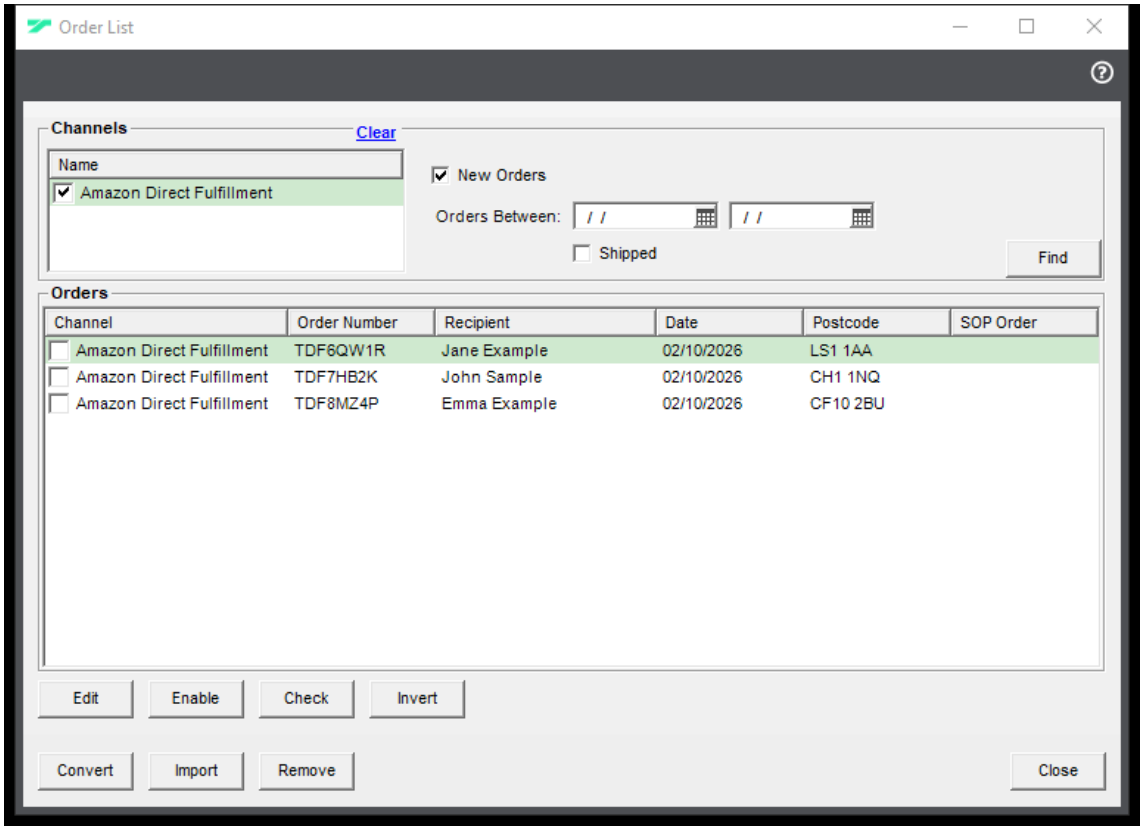
Field	What it does
Last order download:	The date and time, in UTC (UK winter time), of the last new-order download. The next one starts from here. A new channel starts from the moment you open this page.
Bill-to entity:	The Amazon company your invoices are addressed to. Its address and VAT number are added to every invoice. Choose **GB** for Amazon.co.uk. The other choices are AU, BE, CA, CZ, DE, EG, ES, FR, IT, JP, MX_DOMESTIC, MX_IMPORT, NL, PL, SA, SE, SG, TR, AE and US.
Warehouses:	One row for each Sage warehouse used for sales. Type the Amazon warehouse code into **Identifier** for each warehouse you despatch Direct Fulfillment orders from. The rows are brought up to date with your Sage warehouses each time you open this page.
Acknowledgements enabled	Tick to acknowledge orders to Amazon. While it is unticked, the channel cannot be chosen on the **Converted Order List** and acknowledgements are not sent.
Automated rejection enabled	Lets an order that is not fully allocated, and has nothing despatched, be acknowledged as “Canceled out of stock”. Available when acknowledgements are enabled.
Automated SOP order cancellation enabled	When an order is acknowledged as “Canceled out of stock”, also cancels the Sage sales order.

> **Important:** With **Automated rejection enabled** ticked, the acknowledgement automations tell Amazon you cannot supply every order that is not fully allocated when they run. Amazon cancels those orders. Make sure stock is allocated before the automations run, or leave rejection off and acknowledge such orders yourself.

3.3 Screens

Channels ▸ Amazon Direct Fulfillment has five entries: **Order List**, **Converted Order List**, **Shipment List**, **Invoice List** and **Inventory List**. Opening a screen only reads Sage. Only **Find** on the **Order List** contacts Amazon; everything else is sent from **Channels ▸ Export Feeds** or by the upload automations.

Order List



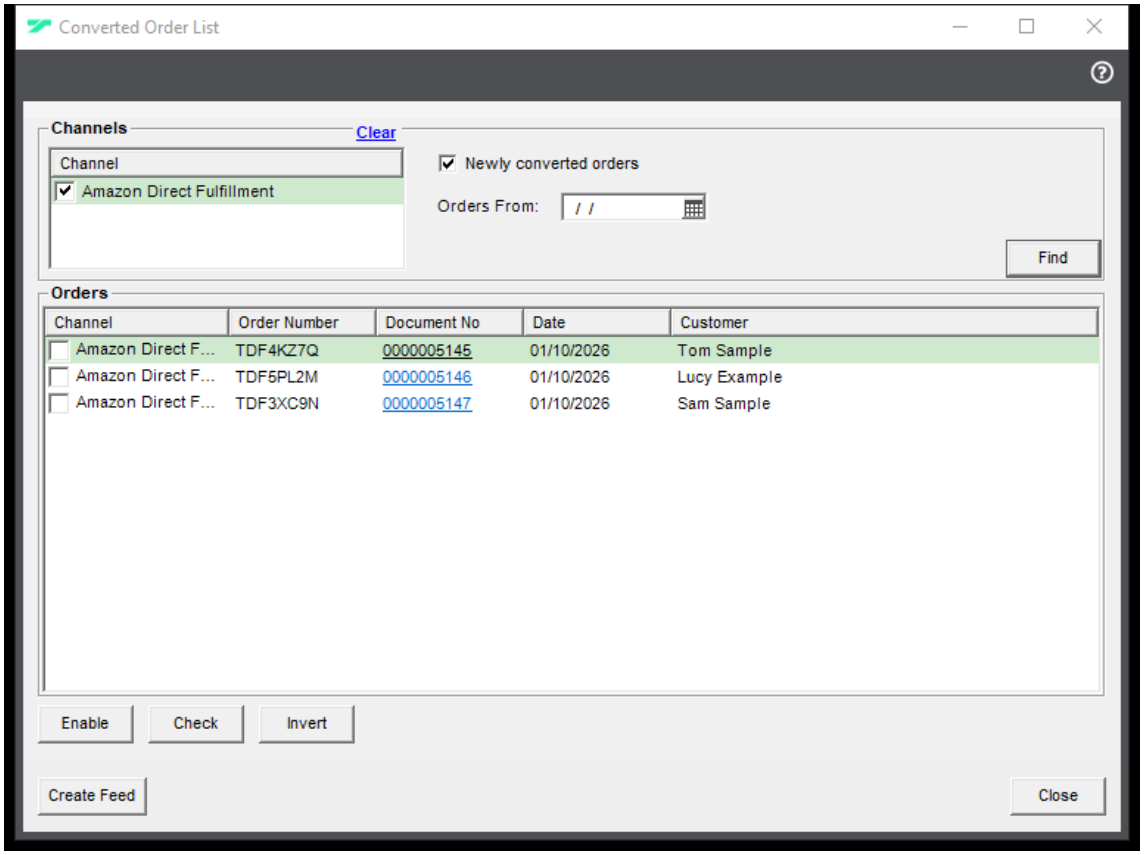
Amazon Direct Fulfillment – Order List

The shared order list (Operator Guide, sections 6.2 to 6.5), with these search options:

Field	What it does
New Orders	Ticked when the screen opens. **Find** downloads new purchase orders created since **Last order download:**, then moves it forward.
Orders Between:	Enter a from date and a to date to download the new orders created in that period. Choosing a date unticks **New Orders**.
Shipped	With **Orders Between:**, downloads the orders Amazon already shows as shipped in that period instead of new ones.

Convert converts the ticked orders to Sage sales orders.

Converted Order List



Amazon Direct Fulfillment – Converted Order List

The shared **Converted Order List** (Operator Guide, section 6.11), where you create acknowledgements. Channels with **Acknowledgements enabled** unticked are greyed out.

- An order can be ticked when its Sage order is fully allocated, which acknowledges it as accepted. It can also be ticked when it is not fully allocated, nothing has been despatched and the channel allows automated rejection. That acknowledges it as “Canceled out of stock”.
- **Create Feed** creates one acknowledgement export feed per order. Channels sends it to Amazon when the export feed is submitted (Operator Guide, section 14).

Shipment List

The shared shipment list (Operator Guide, section 13.3). **Create Feed** creates shipment confirmations for the ticked despatches, up to 100 to an export feed. Amazon supplies the shipping labels and tracking for Direct Fulfillment orders, so carrier and tracking are not sent. Leave **Carrier Mandatory** and **Tracking Mandatory** off on this channel's **Channel Options** (Operator Guide, section 5.1).

Invoice List

The shared invoice list (Operator Guide, section 13.5). **Create Feed** creates one Amazon invoice for each ticked Sage invoice.

Inventory List

The shared inventory list (Operator Guide, section 11.6). **Refresh Inventory Items** builds the channel's item list from the stock alias group linked to the channel. It reads Sage only, because Amazon does not report your Direct Fulfillment stock back. With the older style of list, the **Upload All** box is ticked when the screen opens.

3.4 Automations

Add these to a job bag (Operator Guide, section 15.4). An automation does nothing while the channel is disabled.

Automation	What it does
Download new orders	Downloads new purchase orders created since the last run.
Process orders	Removes any stored order already in Sage, then converts the rest.
Create acknowledgement feeds	Creates acknowledgements for converted orders not yet acknowledged that are fully allocated, plus, with automated rejection, those with nothing despatched.
Upload acknowledgement feeds	Sends the acknowledgements to Amazon (only while acknowledgements are enabled) and, if chosen, cancels the Sage orders acknowledged as out of stock.
Generate Tracking URLs	Builds tracking links for despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds	Creates shipment confirmations for despatches whose required shipment details are complete.
Upload shipment feeds	Sends the shipment confirmations to Amazon.
Create invoice feeds	Creates an Amazon invoice for each Sage invoice not yet sent.
Upload invoice feeds	Sends the invoices to Amazon.
Create inventory Snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Download inventory items	Rebuilds the channel's item list from its stock alias group.
Create delta inventory feed	Creates a stock update for items whose stock has changed. Skipped while inventory feeds are paused (Operator Guide, section 11.2).
Create full inventory feed	Creates a stock update for every item. Skipped while inventory feeds are paused.
Upload inventory feed	Sends the stock updates to Amazon.
Download Transaction Results	Asks Amazon for the outcome of each submission sent. A rejected submission marks its export feed as having errors, with Amazon's reason.

> A typical job bag runs **Download new orders** and **Process orders**, then later **Create acknowledgement feeds** and **Upload acknowledgement feeds** once stock has been allocated. Run the shipment and invoice pairs after despatch and invoicing, and **Download Transaction Results** at the end of each run.

3.5 Orders

- Only purchase orders Amazon shows as new are downloaded. The order number in Channels and the Sage **Customer Document No** are Amazon's purchase order number.
- Each line arrives with your agreed cost price (**NetPrice**), which is used as the Sage unit price before VAT. VAT is worked out by Sage from the customer and item tax codes.
- The order's shipment details are kept as order attributes in the group **ShipmentDetails** (**PackingSlipRequired**, **Priority**, **ScheduledDelivery**, **Gift**, **ShipMethod**), so actions can test them (Operator Guide, section 10).
- You acknowledge each order once, in its own export feed. It is either “Shipping 100 percent of ordered product” (fully allocated, or accepted in full by your third-party warehouse) or “Canceled out of stock”. Each line reports the quantity allocated.
- When **Automated SOP order cancellation enabled** is ticked, an order acknowledged as “Canceled out of stock” is cancelled in Sage when the acknowledgement is sent.

Default mappings

A new channel starts with these mappings. You can change any of them in **Field Mapping** (Operator Guide, section 5.3).

Sage field	Filled from
Customer Account Number	The fixed value Amazon.
Customer Document No	PurchaseOrderNumber.
Document Date	OrderDate.
Requested Date	RequiredShipmentDate.
Promised Date	PromisedDeliveryDate.
Delivery Name, Address 1, Address 2, City	ShipToPartyName, ShipToPartyAddressLine1, ShipToPartyAddressLine2, ShipToPartyCity.
Delivery PostCode, Country Code, Phone Number	ShipToPartyPostalCode, ShipToPartyCountryCode, ShipToPartyPhone.
Default Warehouse	The default warehouse on the Settings screen, when one is set.
Item Code	VendorProductIdentifier (your item code on the purchase order).
Quantity	Amount.
Unit Price	NetPrice.

You can also map the customer order number, tax total, the priority, scheduled-delivery, packing-slip and gift flags, the ship method and the full selling, ship-from, bill-to and ship-to party addresses. On lines, you can map the ASIN (BuyerProductIdentifier), title, gift message, gift wrap and the tax details.

3.6 Inventory

- The items sent are the codes in the stock alias group linked to this channel. Each is sent with your Sage item code and its available stock, never less than zero.
- Each stock update changes only the items it contains. Items you leave out keep their last quantity at Amazon.
- The same quantities are sent for every warehouse that has an **Identifier** on the options page.
- Snapshots, full and delta feeds and pausing feeds work as described in the Operator Guide, sections 11.1 to 11.3.

3.7 Shipments and invoices

- Shipments are sent up to 100 to an export feed; each invoice is its own export feed.
- The ship-from location on acknowledgements, shipments and invoices is the **Identifier** of the warehouse on the Sage order. Every warehouse you despatch from needs one.
- A shipment confirmation gives the despatch date, your Sage order number and the items and quantities despatched. Amazon's own labels carry the tracking.
- An invoice carries your company name, address and VAT number from Sage company details. It is addressed to the **Bill-to entity:** with that company's VAT number, and includes each invoiced line with its net price and VAT. An invoice may contain only one VAT rate.
- Amazon checks every submission in the background. **Download Transaction Results** collects the outcome, and a rejected submission shows on **Channels ▸ Export Feeds** as **Processed with errors**, with Amazon's reason (Operator Guide, section 14.4).

3.8 Points to note

- The channel uses Amazon's European Vendor Central service.
- Only new orders are downloaded. Changes and cancellations made by Amazon after download are not brought into Sage.
- Warehouse codes are held against the Sage warehouse name. If you rename a warehouse, re-enter its **Identifier**.

- Acknowledgements are all or nothing. An order is either accepted in full or cancelled as out of stock.
- Keep each invoice to a single VAT rate.

4. Shopify

4.1 What it does

The Shopify channel downloads orders from your Shopify store as stored orders, so that you can check them and convert them to Sage sales orders. Web orders are always downloaded. Point-of-sale (POS) sales from Shopify's till can be downloaded as well if you choose. When you despatch an order in Sage, Channels sends the despatch back to Shopify as a fulfilment with the carrier and tracking number. Channels can also keep the stock level of each product in one Shopify location in line with your Sage free stock.

Optional features:

- **Gift cards** – gift cards bought and gift cards redeemed are posted to a cash book of your choice.
- **Pre-orders** – pre-order sales can be placed on hold, and their payment is receipted into a liability cash book when the order is invoiced.
- **Other currencies** – orders paid in the customer's own currency can come into Sage in that currency, on a customer account per currency.
- **Metafields** – stock item analysis codes, and the next available date and quantity of each item, can be written to Shopify product metafields for your theme to display.
- **Refunds** – when the Tilted Retail add-on is installed, a refund of a Shopify order raised in Sage can be sent to Shopify.
- **SparkLayer** – the SparkLayer B2B trade portal that runs on Shopify (section 4.8).

4.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Shopify** (Operator Guide, section 4.2). The wizard has these pages, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5):

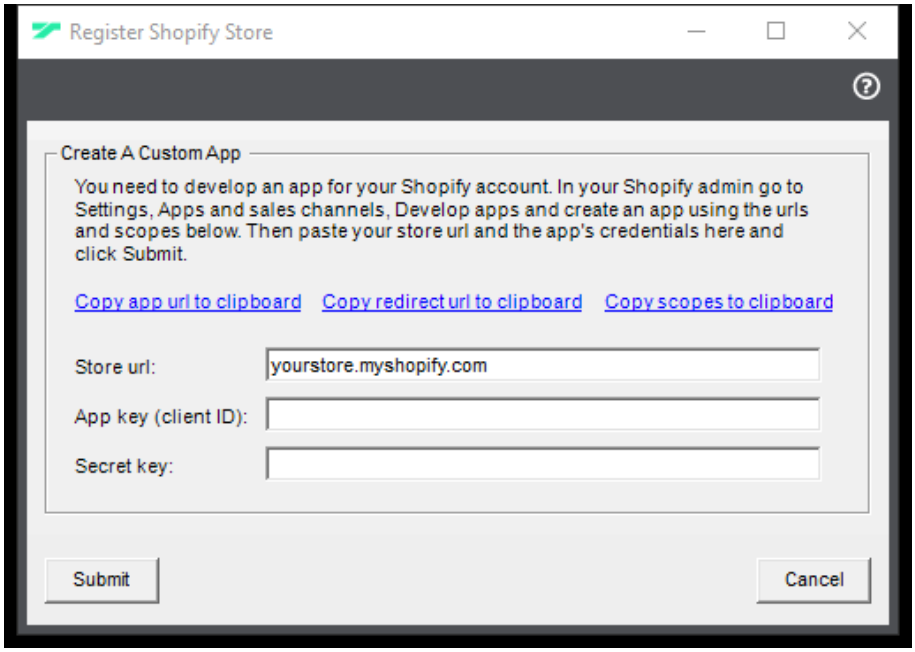
1. **Connection** – your store and the access token.
2. **Options** – download, payment and stock options.
3. **Locations / Entities** – the Shopify location for stock, and optional order filters.
4. **Pre-orders** – pre-order processing.
5. **SparkLayer** – the SparkLayer B2B connection (section 4.8).

Getting an access token

Channels talks to Shopify through a Shopify app with an access token. The recommended way to get one is the **Connect** button on the Connection page:

1. In the Shopify admin go to **Settings** ▸ **Apps and sales channels** ▸ **Develop apps** and create an app for Channels.
2. On the Connection page enter the **Store name:** and click **Connect**. The **Register Shopify Store** window opens.
3. Use **Copy app url to clipboard**, **Copy redirect url to clipboard** and **Copy scopes to clipboard** to paste the app address, redirect address and permissions into your new Shopify app.

4. Enter the **Store url:**, the app's **App key (client ID):** and **Secret key:**, and click **Submit**. This registers your store with Tilted so that the app can be approved.
5. Your browser opens Shopify's approval page. Approve the app; Channels shows “Approve the app in your browser, then copy the access token shown and paste it into 'Access token'.”
6. Copy the access token shown in the browser into **Access token:** on the Connection page.



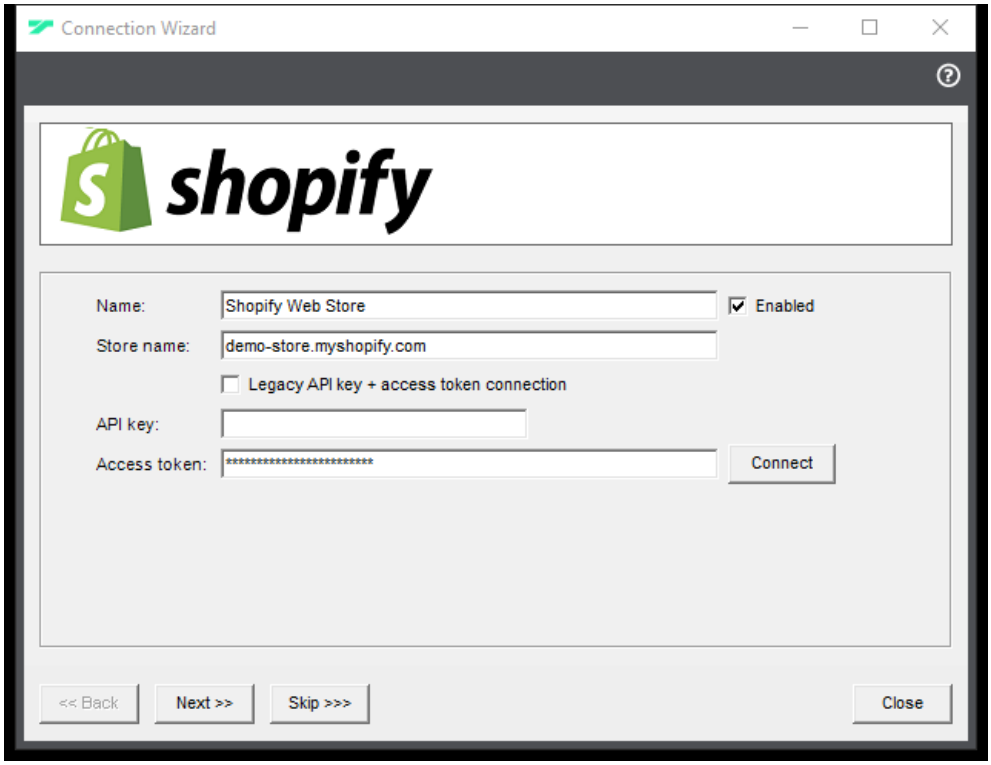
Shopify – Register Shopify Store

Important: **Submit** sends your app's key and secret to Tilted to register the store. Only use it with the live store you are connecting, and keep the secret key private.

An older private app with an API key and password still works: tick **Legacy API key + access token connection** and enter the **API key:** and the password as the **Access token:**.

Important: Shopify does not report a missing permission (scope) as an error: the data is simply left out. Without **read_merchant_managed_fulfillment_orders** every order fails **Filter orders by location** and no fulfilment can be sent; without **read_all_orders** orders more than 60 days old cannot be seen, so their despatches are skipped (section 4.7). Click **Test** on the Connection page to list any missing scopes. To add them to an existing store, add them to the Shopify app (use **Copy scopes to clipboard**), open the app from the Shopify admin to approve it again, and paste the new access token into **Access token:**.

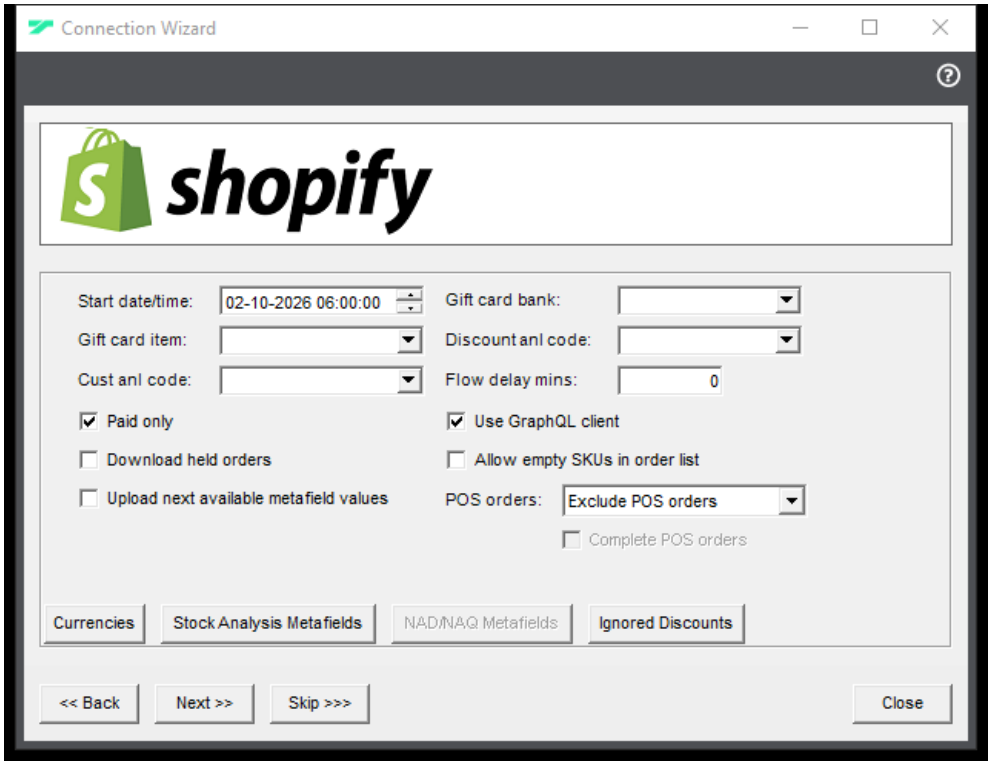
Connection page



Shopify – connection page

Field	What it does
Name:	The channel's name, shown on every list, job bag and export feed. Required.
Enabled	Switches the channel on. Lists and automations only use enabled channels.
Store name:	Your store's Shopify address, for example `yourstore.myshopify.com`. A new channel shows `xxxxxx.myshopify.com`, which you must replace. Required.
Legacy API key + access token connection	Tick only for an older Shopify private app. It enables **API key:** and turns off **Connect**. Unticked on a new channel.
API key:	The private app's API key (legacy connection only).
Access token:	The app's Admin API access token (or the private app's password). Required.
Connect	Registers the store and opens Shopify's approval page (see above).
Test	Checks the **Store name:** and **Access token:** with one read-only request, then says either that the token has every scope Channels needs or which scopes are missing.

Options page

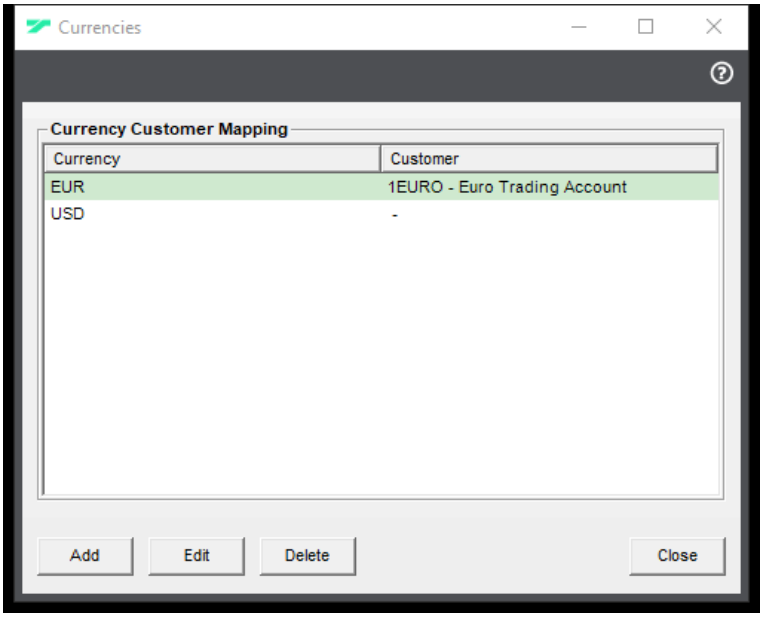


Shopify – options page

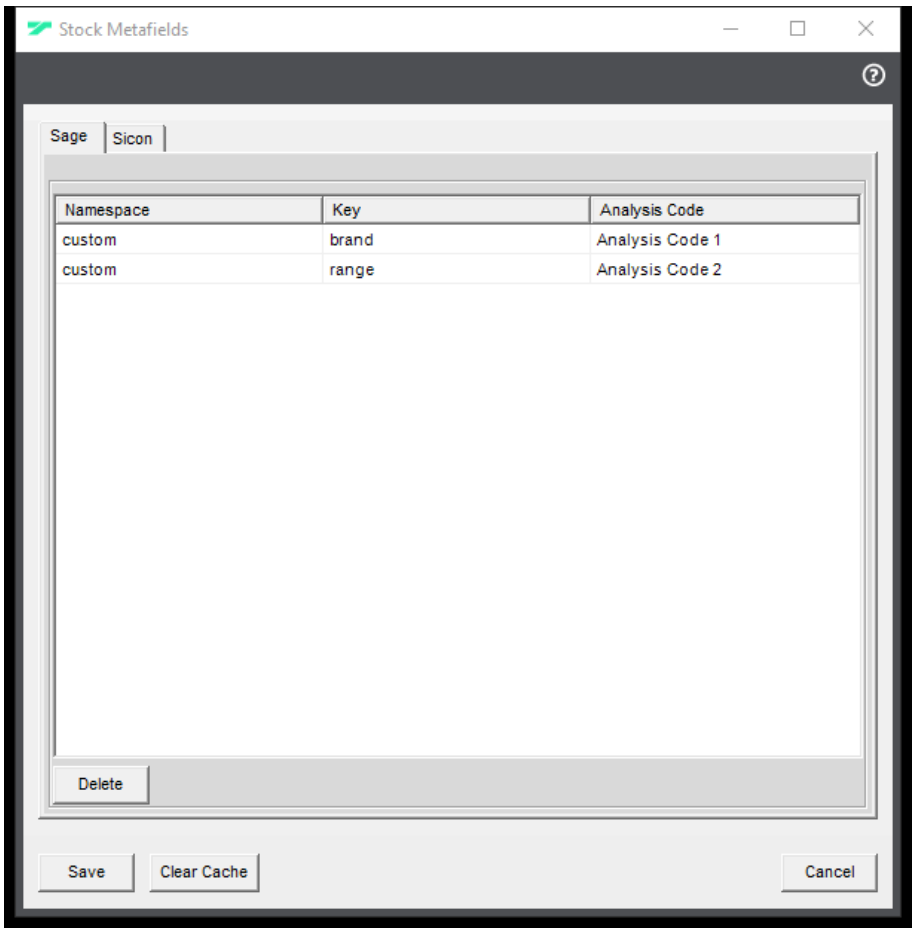
Field	What it does
Start date/time:	Orders updated since this time are downloaded the first time. Channels moves it forward after every download. Today on a new channel.
Gift card item:	The Sage item used on the order line when a customer buys a gift card. It must be a non-despatchable sales order item. Optional.
Gift card bank:	The cash book for gift cards: gift cards sold are posted to it, and gift cards used to pay for an order are receipted from it. Required when a gift card item is chosen.
Cust anl code:	A customer analysis code that holds the Shopify customer ID. When set, an order goes on the Sage customer whose code matches the Shopify customer. Optional.
Discount anl code:	A sales order analysis code that receives the order's discount codes, separated by commas. Optional.
Flow delay mins:	Ignores orders changed in the last few minutes, so that apps such as Shopify Flow can finish editing them first. Default 0.
Paid only	Only downloads orders that are paid or partly refunded. Off by default.
Download held orders	When off (the default), orders on hold in Shopify are left until they are released.
Use GraphQL client	Uses Shopify's current GraphQL interface for everything. Needed for POS orders and the Locations / Entities filters. Recommended for all stores. Off by default.
Allow empty SKUs in order list	When off (the default), order lines without a SKU are left out. When on, they are kept so that you can enter the SKU on the stored order before converting it.
Upload next available metafield values	Turns on the next available date and quantity metafields (set up with **NAD/NAQ Metafields**). Off by default.
POS orders:	**Exclude POS orders** (the default), **Include POS orders** or **POS orders only**. Anything other than **Exclude POS orders** needs **Use GraphQL client**.
Complete POS orders	Despatches, invoices and posts POS sales as soon as they are converted, because the customer has already paid and taken the goods. Available when POS orders are downloaded. Off by default.

The buttons at the foot of the page open further settings:

Button	What it does
Currencies	Lists the currencies you accept on Shopify and the Sage customer account for each (**Currency Code:** and **S/L Account:**). An order paid in a listed currency is raised on that account. If Channels creates customers automatically, the account is left blank and the customer is found or created in that currency. The order's values always follow the Sage customer's currency: Shopify supplies every amount in both the store currency and the currency the customer paid in, and Channels posts the set that matches the account. If the account's currency is neither, the order is not converted and the error names the three currencies.
Stock Analysis Metafields	Maps stock item analysis codes to Shopify metafields (**Namespace**, **Key**, **Analysis Code**). The **Sicon** tab does the same for Sicon analysis fields when Sicon is installed. **Clear Cache** makes the next synchronisation send every value again.
NAD/NAQ Metafields	The metafields that receive the next available date (**Date namespace:**, **Date key:**) and quantity (**Quantity namespace:**, **Quantity key:**).
Ignored Discounts	Discount titles that are not taken off the line price, for example a staff discount that you account for elsewhere.



Shopify – Currencies



Shopify – Stock Metafields

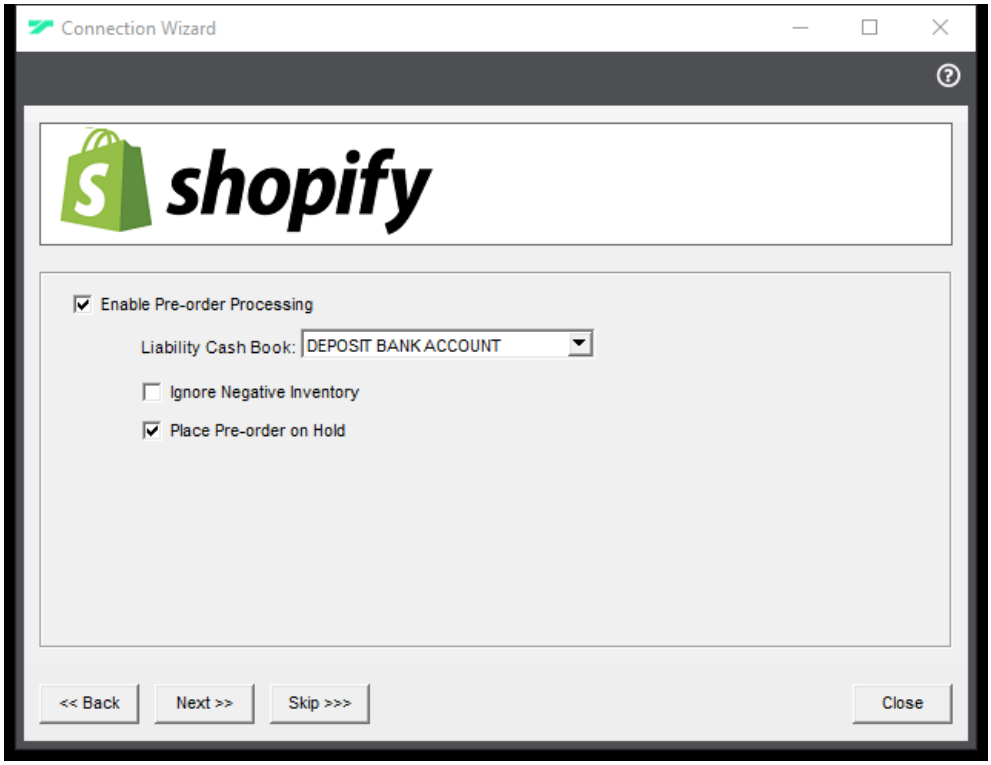
Locations / Entities page

This page reads your store's locations and business entities from Shopify when it opens, so the connection details must be correct and the computer must be online.

Field	What it does
Location:	The Shopify location whose stock Channels updates. Required.
Only download orders for this location	Downloads only orders that Shopify has assigned to this location, or POS sales taken at it. Needs **Use GraphQL client**. Off by default.
Business Entities:	The store's business entities (legal entities). Tick the ones this channel is for.
Only download orders for these business entities	Downloads only orders for the ticked entities. Tick at least one entity. Needs **Use GraphQL client**. Off by default.

> You can run two Shopify channels against one store – for example one for web orders and one for a shop's POS sales – by giving them different POS settings, locations or entities. Each order is taken by the first channel that sees it, so make sure the two channels do not overlap.

Pre-orders page



Shopify – Pre-orders page

Field	What it does
Enable Pre-order Processing	Recognises pre-order lines and orders (section 4.5). Off by default.
Liability Cash Book:	The cash book a pre-order's payment is receipted into when the order's invoice is posted. Required when pre-order processing is enabled.
Ignore Negative Inventory	Does not update stock for a product whose Shopify stock is below zero (sold on pre-order). Off by default.
Place Pre-order on Hold	Puts the Sage order for a pre-order on hold. Off by default.

The **SparkLayer** page is described in section 4.8. Leave **SparkLayer Enabled** unticked unless you use SparkLayer.

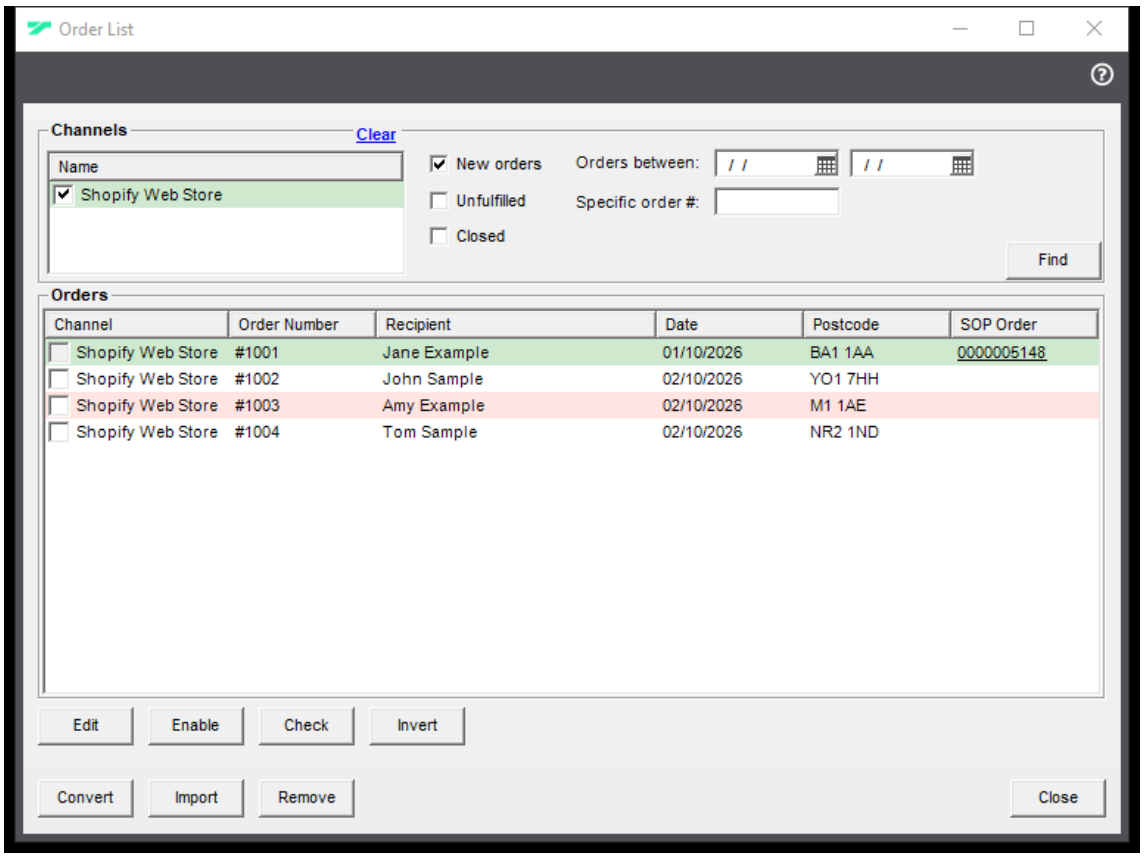
4.3 Screens

Channels ▸ **Shopify** has three entries – **Order List**, **Shipment List** and **Inventory List** – and the **SparkLayer** folder with the five SparkLayer feed lists (section 4.8).

Order List

The shared order list (Operator Guide, sections 6.2 to 6.5). **Order Number** shows the Shopify order name, for example `#1001`. The Shopify search options are:

Field	What it does
New orders	Ticked when the list opens. **Find** downloads new and changed orders since the last download – the same download as the **Download new orders** automation.
Unfulfilled	Limits the download to orders not yet fulfilled in Shopify.
Orders between:	Untick **New orders** and enter the from and to dates to download the orders created between them.
Closed	With a date range, downloads only closed (archived) orders.
Specific order #:	Downloads one order by its Shopify order name, for example `#1001`.

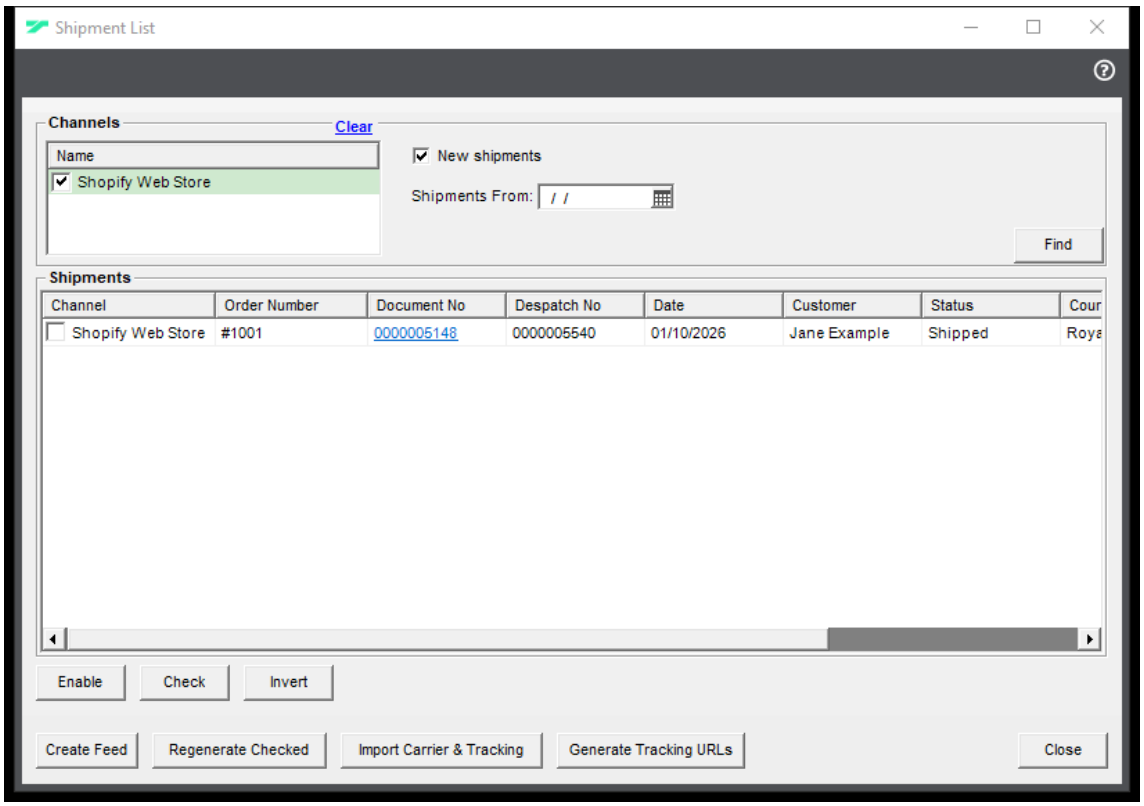


Shopify – Order List

Opening the list only shows the stored orders; **Find** contacts Shopify.

Shipment List

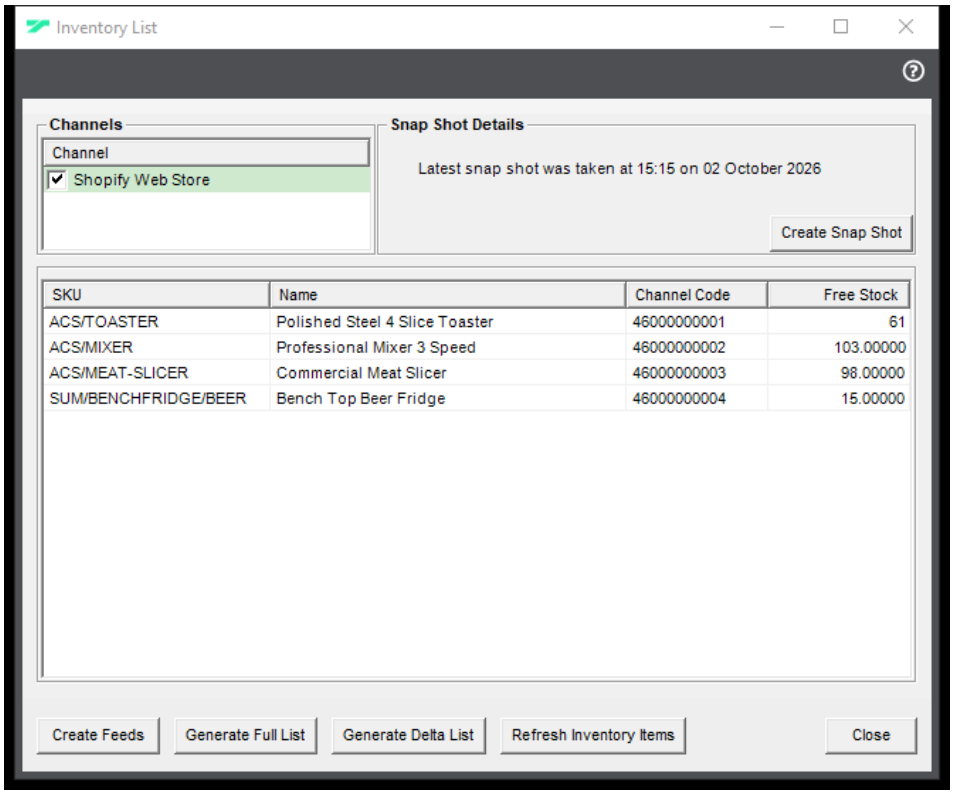
The shared shipment list (Operator Guide, section 13.3). **Create Feed** reads each order's fulfilment details from Shopify while it builds the export feed, then reports "<n> feeds have been successfully generated.". Submit the export feed from **Channels** ▸ **Export Feeds** or send it with the **Upload shipment feeds** automation (Operator Guide, section 14).



Shopify – Shipment List

Inventory List

The shared inventory list (Operator Guide, section 11.6). **Refresh Inventory Items** downloads your Shopify products and variants, so that Channels knows which SKUs are on the store. **Create Feeds** reads the current Shopify stock levels and puts only the items that differ into the export feed.

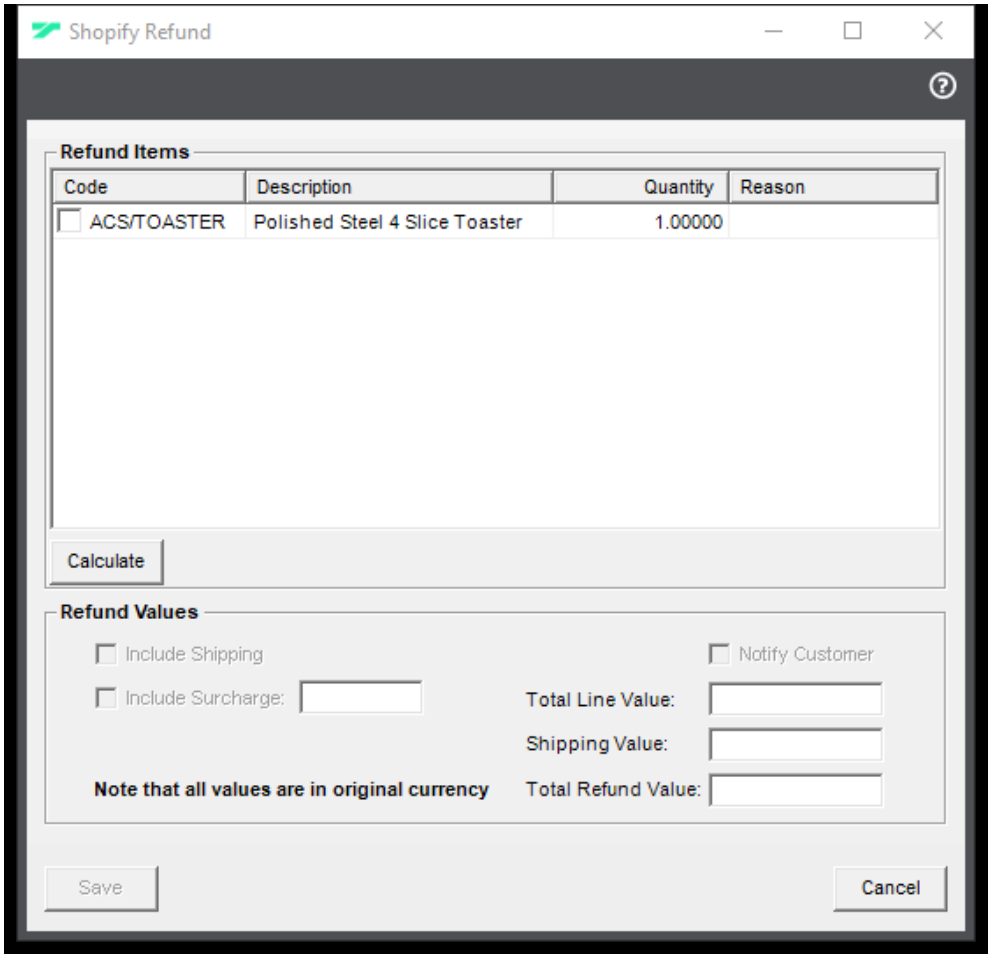


Shopify – Inventory List

Shopify Refund

When the Tilted Retail add-on is installed and you refund a Shopify order or return from Sage, the **Shopify Refund** window opens.

Field	What it does
Refund Items	The order lines, with the **Quantity** to refund and the **Reason** (taken from a Retail return).
Calculate	Asks Shopify to work out the refund for the items chosen. The values below, and **Include Shipping**, fill in only after you click it.
Total Line Value:	The value of the goods being refunded.
Include Shipping / Shipping Value:	Refunds all or part of the carriage.
Include Duties:	Refunds import duties (shown when duties are switched on in Settings).
Include Surcharge:	Deducts a handling surcharge, which is noted on the refund.
Total Refund Value:	The amount that will be refunded to the customer. All values are in the order's original currency.
Notify Customer	Shopify e-mails the customer about the refund.
Save	Asks “Are you sure you want to refund <value> against this order?”, then sends the refund to Shopify and shows “Refund processed successfully”.



Shopify – Shopify Refund

> **Important: Save** refunds the customer's payment in Shopify straight away. The goods are not restocked in Shopify; stock comes back through Sage.

4.4 Automations

Add these to a job bag (Operator Guide, section 15.4). The SparkLayer automations are listed in section 4.8.

Automation	What it does
Download new orders	Downloads new and changed orders as stored orders.
Process orders	Converts the stored orders to Sage sales orders, removing any already converted.
Generate Tracking URLs	Builds tracking links for despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds	Creates export feeds for despatches whose carrier and tracking details are complete.
Upload shipment feeds	Sends the shipment export feeds to Shopify as fulfilments.
Download inventory items	Downloads the store's products and variants so that stock can be matched by SKU.
Create inventory Snapshot	Takes the stock snapshot that the inventory feeds use (Operator Guide, section 11.3).
Create delta inventory feed	Creates a stock export feed for items whose stock has moved.
Create full inventory feed	Creates a stock export feed for every item.
Upload inventory feed	Sends the stock export feeds to Shopify.
Upload inventory availability	Writes each item's next available date and quantity to the NAD/NAQ metafields.
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders after the number of days set on the channel's **Channel Options** (Operator Guide, sections 5.1 and 15.4).
Synchronise Product Metafields	Writes the Stock Analysis Metafields to your products, sending only values that have changed.
Clear Metafield Cache	Forgets which metafield values were sent, so that the next synchronisation sends them all.

4.5 Orders

Which orders are downloaded

- **New orders** looks at open orders changed since the last download (with an hour's overlap, plus any flow delay). Cancelled orders are never downloaded.
- With **Paid only**, only paid and partly refunded orders are taken.
- Orders on hold are skipped unless **Download held orders** is ticked; they are picked up once they are released.
- POS sales follow the **POS orders:** setting, and the Locations / Entities filters apply.
- Each order is downloaded once. Changes made in Shopify after an order has been downloaded are not picked up.

Customer account

Orders go on the customer account set in **Field Mapping** (`SHO001` on a new channel) unless one of these applies:

- **SparkLayer** – the order goes on the trade customer's own Sage account (section 4.8).
- **Cust anl code:** – the Sage customer whose analysis code holds the Shopify customer ID.
- **Currencies** – the account set for the currency the customer paid in. Whichever route names the account, the order values are taken in that account's currency (store or paid currency), or the order stops with an error.

Finding or creating customers automatically is described in the Operator Guide, section 6.6.

Addresses, lines and prices

- The delivery company, when given, becomes the first line of the delivery address. A gift-card-only order with no delivery address uses the customer's default address.
- Each line's SKU is the Sage item code. The quantity is the current quantity, so items removed by an order edit before download are left out.
- The unit price is the price after the line's share of any discounts, except discounts listed in **Ignored Discounts**. The order's discount codes go into the **Discount anl code:**.
- Prices are treated as including VAT. If your store's prices exclude tax, change the **Tax Inclusive** mapping (Operator Guide, section 5.3).
- The carriage charge, less any shipping discount, becomes the order's shipping value.
- Order notes and attributes, and line properties, are kept as order and line attributes that you can map or use in actions.

Payments

- The order's payment becomes a Sage receipt, with the payment gateway reference as the receipt reference. Further payments on the same order become extra receipts.
- No receipt is created until the order is paid (or partly refunded) in Shopify.
- Gift cards used to pay are receipted from the **Gift card bank:**. A gift card bought on the order is added as the **Gift card item:** with its codes, and its value is posted to the gift card bank.

Pre-orders, POS sales and refunds

- With pre-orders enabled, a pre-order is marked as a pre-order and optionally placed on hold. When its invoice is posted, the order's payment is receipted into the **Liability Cash Book:** (event **Preorder Receipt Created**; Operator Guide, section 16.10). Where a pre-order app splits an order, the in-stock part and the pre-order part become separate Sage orders.
- With **Complete POS orders**, a POS sale is despatched, invoiced and posted as soon as it is converted, provided it is fully allocated and not on hold.
- Refunds made in Shopify are not downloaded. Refunds raised in Sage through Tilted Retail are sent with the **Shopify Refund** window (section 4.3).

4.6 Inventory

1. **Download inventory items** (or **Refresh Inventory Items**) learns the store's SKUs. Gift card products are left out.
2. A full or delta inventory feed is created from the stock snapshot (Operator Guide, sections 11.2 and 11.3).
3. When the export feed is created, Channels reads the current Shopify stock and keeps only the items whose level differs from Sage free stock.
4. **Upload inventory feed** sets the stock of each item at the **Location:** chosen on the Locations / Entities page, in whole units.

With **Upload next available metafield values**, **Upload inventory availability** writes each item's next available date and quantity to the metafields you set. **Synchronise Product Metafields** writes the Stock Analysis Metafields.

4.7 Shipments

- For each despatch, Channels reads the order's fulfilment orders from Shopify and fulfils the lines despatched in Sage, with the quantities despatched. Partial despatches are supported.
- Lines that are on the Shopify order but were never part of the Sage order (for example a line without a SKU) are fulfilled with the first despatch.
- The carrier is the despatch's courier, with the tracking number and tracking link. Shopify e-mails the customer for the shipped goods.
- Click and collect orders waiting for collection are fulfilled in the same way.
- If the Shopify app does not have the **read_all_orders** scope, Shopify hides orders created more than 60 days ago. A despatch of such an order is skipped rather than failing on every run: it is not sent to Shopify, it is not listed again, and the reason is recorded in the **Events** list on the sales order's **Channels** tab. A feed in which every despatch was skipped is trashed.
- Shipment and stock export feeds appear on **Channels** ▸ **Export Feeds** with the recipient “Shopify API” (Operator Guide, section 14).

4.8 SparkLayer (B2B) and the SparkLayer feed lists

What it does

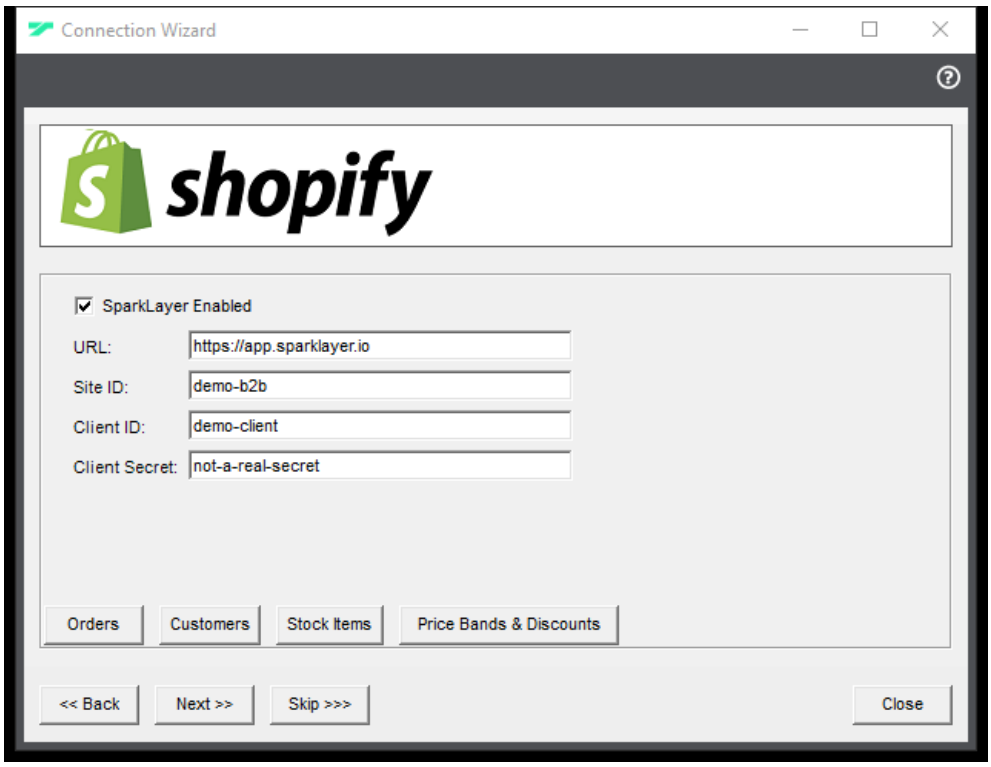
SparkLayer is a trade (B2B) ordering portal that runs on a Shopify store. With SparkLayer switched on for a Shopify channel, Channels keeps SparkLayer and Shopify up to date from Sage:

- **Customers** – trade customers are created and updated in Shopify, with their SparkLayer group, price list, company name, account reference, credit position and addresses. Their Sage order history can be shown on the portal.
- **Price bands** – each customer price band (with its customer discount group, if any) becomes a SparkLayer price list holding the price of every product on the store.
- **Stock** – each product shows a restock date and quantity from your next purchase order due, and recommended retail prices.
- **Invoices** – invoice PDFs are uploaded to your web server and linked to the order on the portal.
- **Purchasing API** – optionally, Sage orders for trade customers are kept on SparkLayer's own order system rather than as Shopify orders, including amendments, cancellations and despatches.

Trade orders placed on the portal download like any Shopify order, and are placed on the customer's own Sage account.

Setting it up

Edit the Shopify channel (Operator Guide, section 4.3) and go to the **SparkLayer** page.

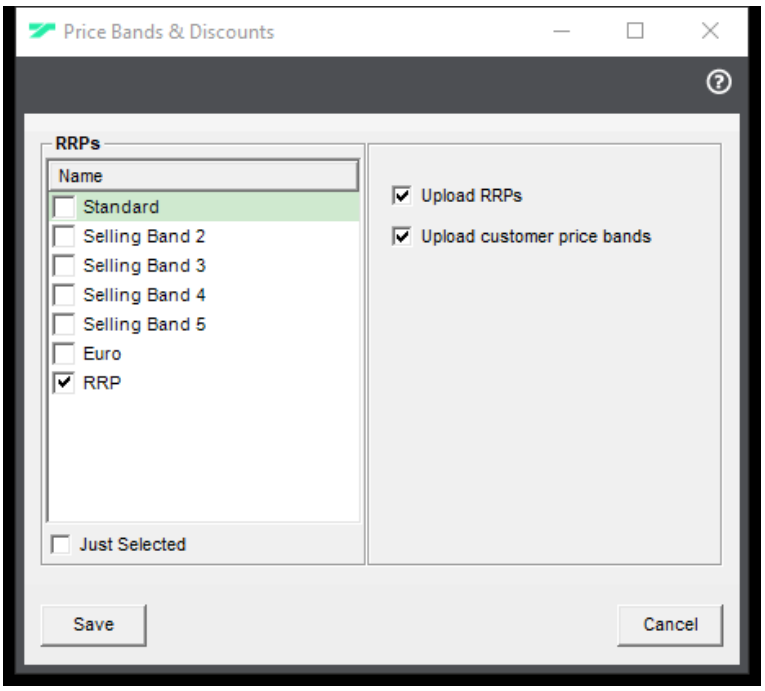


Shopify – SparkLayer page

Field	What it does
SparkLayer Enabled	Switches SparkLayer on for this channel. Off by default.
URL:	The SparkLayer address. Default `https://app.sparklayer.io`.
Site ID:	Your SparkLayer site ID. Required.
Client ID:	The SparkLayer API client ID. Required.
Client Secret:	The SparkLayer API client secret. Keep it private. Required.

The four buttons on the page open the SparkLayer settings:

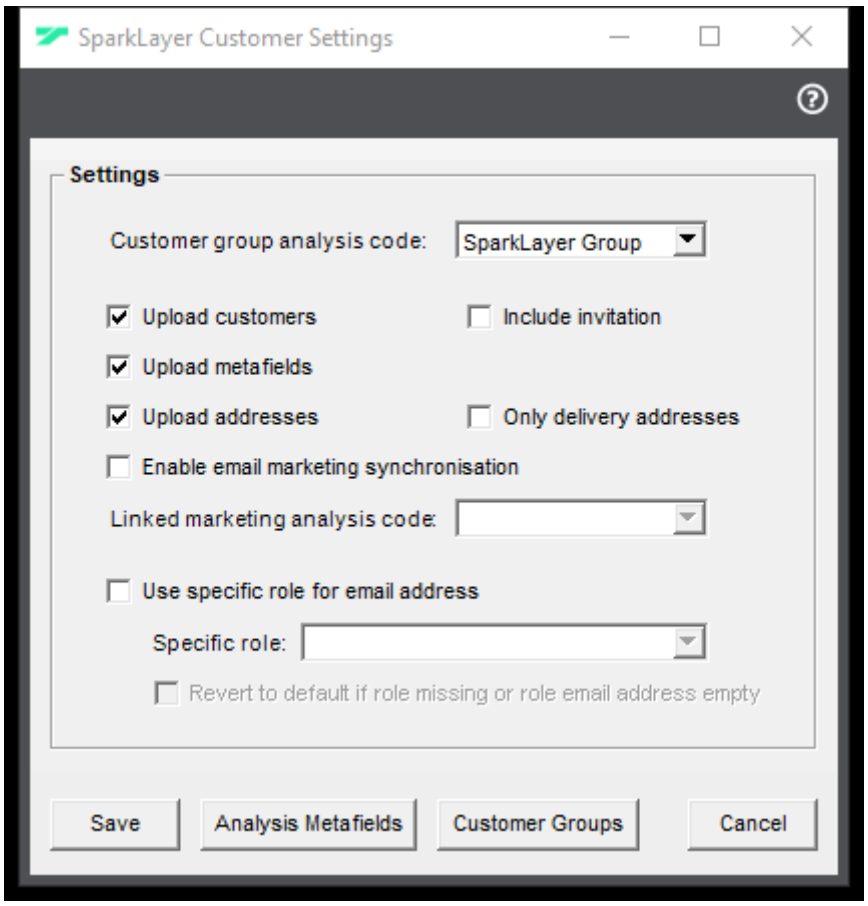
Button	What it does
Stock Items	Opens **SparkLayer Stock Settings**: **Upload restock_date based on next Purchase Order due for receipt** and **Upload min_stock_level based on next Purchase Order quantity**.
Customers	Opens **SparkLayer Customer Settings** (below).
Price Bands & Discounts	Opens **Price Bands & Discounts**: **Upload customer price bands** sends the customers' price bands as price lists; **Upload RRPs** sends recommended retail prices from the price bands ticked under **RRPs** (one per currency; **Just Selected** shows only the ticked bands).
Orders	Opens **SparkLayer Order Settings** (below).



SparkLayer – Price Bands & Discounts

SparkLayer Customer Settings:

Field	What it does
Upload customers	Turns on the customer feed.
Customer group analysis code:	The customer analysis code that holds each trade customer's group. Customers with a value are SparkLayer customers; **Customer Groups** maps each value to a SparkLayer group.
Include invitation	Shopify e-mails new customers an invitation to activate their account.
Upload metafields	Sends the SparkLayer customer details, plus extra analysis codes set with **Analysis Metafields**.
Upload addresses	Sends the customer's addresses. **Only delivery addresses** sends delivery addresses only.
Use specific role for email address	Takes the customer's e-mail address from a contact role (**Specific role:**). **Revert to default if role missing or role email address empty** falls back to the account e-mail.
Enable email marketing synchronisation	Keeps e-mail marketing consent in step, recording it as YES or NO in the **Linked marketing analysis code:**.

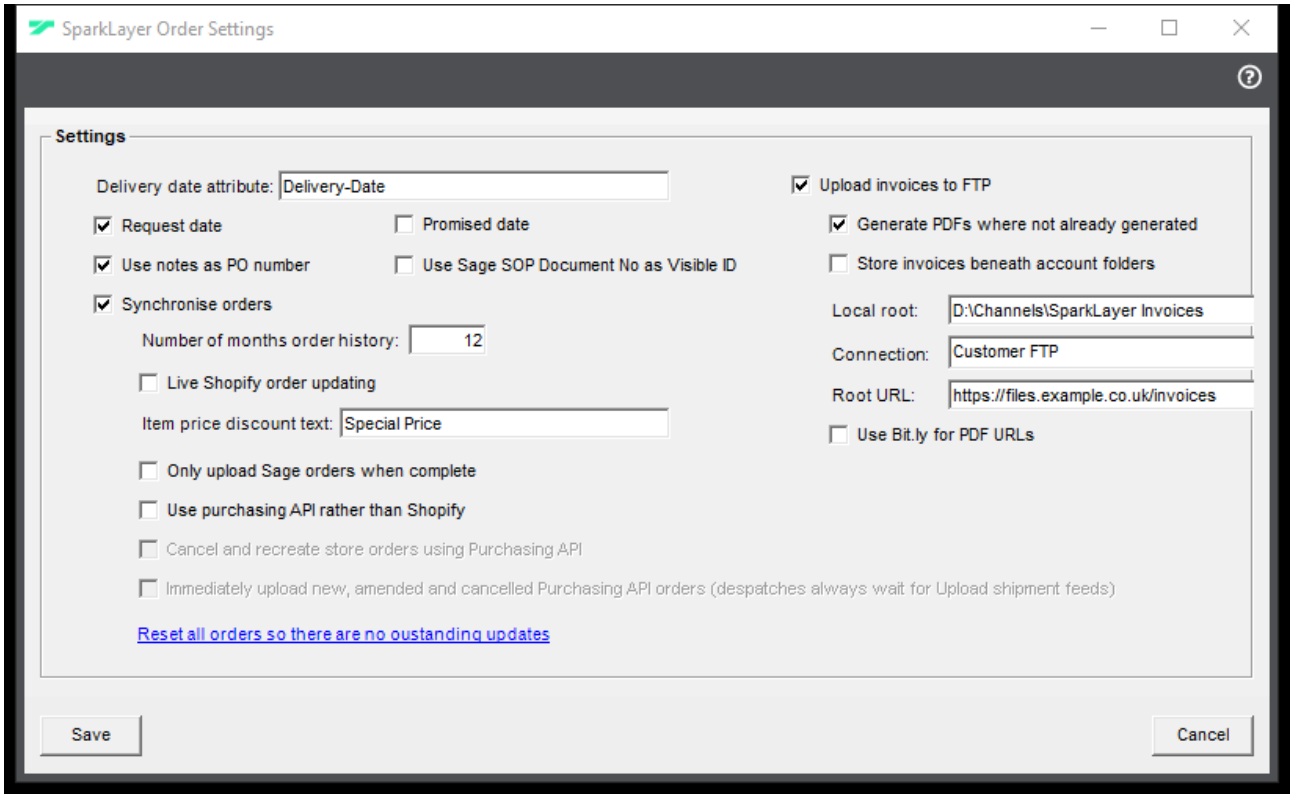


SparkLayer – Customer Settings

Customer Groups reads your SparkLayer groups when it opens, so it needs a live connection.

SparkLayer Order Settings:

Field	What it does
Use notes as PO number	Uses the order note as the Sage customer order number.
Delivery date attribute:	The order attribute that holds the delivery date the customer chose; **Request date** and **Promised date** choose which Sage dates receive it.
Use Sage SOP Document No as Visible ID	Shows the Sage order number on the portal once the order is converted.
Synchronise orders	Shows customers their Sage orders for the **Number of months order history:**. **Only upload Sage orders when complete** limits this to completed orders.
Live Shopify order updating	Updates the customer's order on the portal as soon as it is saved in Sage. **Item price discount text:** labels line discounts.
Use purchasing API rather than Shopify	Keeps trade orders on SparkLayer's Purchasing API instead of as Shopify orders.
Cancel and recreate store orders using Purchasing API	After a portal order is converted, it is moved from Shopify to the Purchasing API.
Immediately upload new, amended and cancelled Purchasing API orders (despatches always wait for Upload shipment feeds)	Sends order changes as soon as they happen rather than with the automation.
Upload invoices to FTP	Turns on invoice uploads: **Generate PDFs where not already generated**, **Local root:** (the folder for the PDFs), **Store invoices beneath account folders**, **Connection:** (the FTP connection) and **Root URL:** (the web address the files are published under).
Reset all orders so there are no outstanding updates	Marks every order as up to date, so that only later changes are sent. Asks you to confirm first.



SparkLayer – Order Settings

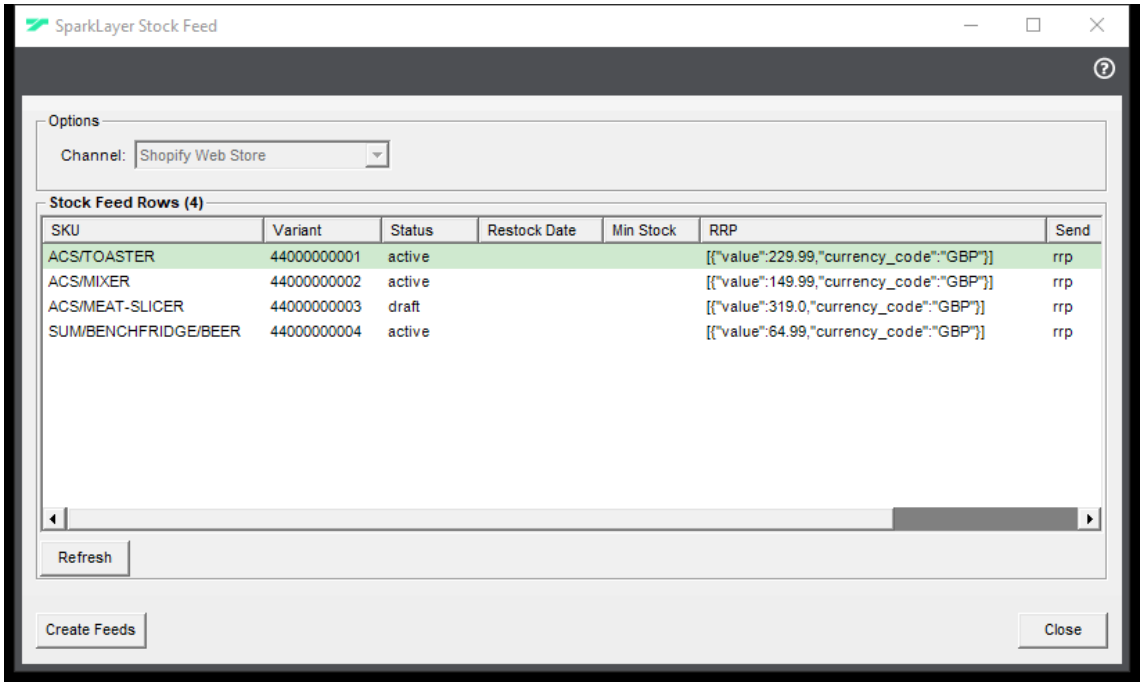
The SparkLayer feed lists

Channels ▸ Shopify ▸ SparkLayer has five feed lists: **Stock Feed List**, **Customer Feed List**, **Price Band Feed List**, **Invoice Feed List** and **Purchase Feed List**. They all work the same way:

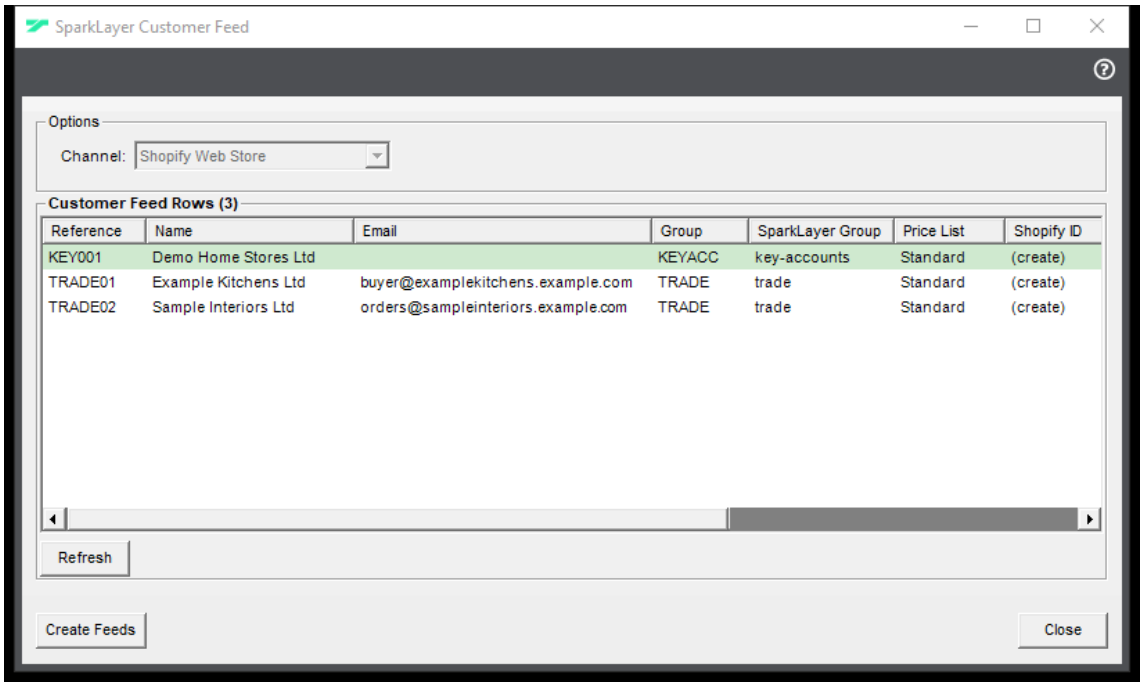
Field	What it does
Channel:	The Shopify channel with SparkLayer switched on. If there is only one, it is chosen for you.
Refresh	Builds the rows the export feed would contain from Sage and lists them, without creating an export feed.
Create Feeds	Creates the export feed. Submit it from **Channels ▸ Export Feeds** or send it with the matching **Upload SparkLayer … feed** automation (Operator Guide, section 14).
Close	Closes the list.

List	What the feed contains
Stock Feed List	Products whose restock date, minimum stock level or RRP has changed since they were last sent (**SKU**, **Variant**, **Status**, **Restock Date**, **Min Stock**, **RRP**, **Send**, **Note**). **Restock Date** and **Min Stock** are filled only when the inventory snapshot calculates next available dates (Operator Guide, section 11.3).
Customer Feed List	Every SparkLayer customer, with **Reference**, **Name**, **Email**, **Group**, **SparkLayer Group**, **Price List**, **Shopify ID**, **Addresses** and any **Warning** to fix first, such as a missing e-mail address or group mapping.
Price Band Feed List	One row per price list: **Name**, **Currency**, **Price Band**, **Discount Group**, **Customers**, **Prices**. Price lists that no longer exist in Sage are removed from SparkLayer when the export feed is sent.
Invoice Feed List	Portal orders with invoices not yet uploaded (**Document No**, **Cust Doc No**, **Customer**, **Shopify Order**, **Invoices**, **Files**). With **Generate PDFs where not already generated** ticked, **Create Feeds** creates missing invoice PDFs in the **Local root:** folder.

List	What the feed contains
Purchase Feed List	Purchasing API orders that have changed in Sage since they were last sent, and cancelled orders (**Document No**, **Customer Doc No**, **Customer**, **Action**, **Packages**, **New Shipments**, **Hash**, **Shopify Order**).



SparkLayer – Stock Feed List



SparkLayer – Customer Feed List

If nothing needs sending, **Create Feeds** shows “Nothing to send - no SparkLayer <type> feed was created.”.

SparkLayer automations

Automation	What it does
Synchronise SparkLayer Stock	Creates and sends the stock export feed in one step.
Create SparkLayer stock feed / Upload SparkLayer stock feed	The two halves separately. Creating the export feed downloads the store's products first.

Automation	What it does
Synchronise SparkLayer Customers	Creates and sends the customer export feed.
Create SparkLayer customer feed / Upload SparkLayer customer feed	The two halves separately.
Synchronise SparkLayer Price Bands	Creates and sends the price band export feed.
Create SparkLayer price band feed / Upload SparkLayer price band feed	The two halves separately.
Upload SparkLayer Invoices	Creates and sends the invoice export feed.
Create SparkLayer invoice feed / Upload SparkLayer invoice feed	The two halves separately.
Create SparkLayer purchase feed	Purchasing API: picks up any order changes not yet sent.
Upload SparkLayer purchase feed	Purchasing API: sends order changes. Despatches go with **Upload shipment feeds**.

Trade orders

- When a portal order is converted, Channels reads the customer's account reference from Shopify and places the order on that Sage account. An order from a customer who is not set up for SparkLayer stops with a message (chapter 31).
- A portal order paid on account does not create a receipt.
- With the Purchasing API, amendments made in Sage, cancellations and despatches are sent as purchase export feeds.
- A customer's SparkLayer link can be checked from the customer record (**Channels** tab, **Sparklayer Options**), which shows the Shopify customer and offers **Synchronise**, **Update Shopify Email**, **Delivery Address Accounts** and the customer's linked **Orders**. This window contacts Shopify when it opens.

4.9 Points to note

- A channel updates stock in one Shopify location. Use a second channel for a second location.
- The Locations / Entities page needs a live connection to Shopify.
- Shopify apps without access to all orders can only see orders from about the last 60 days; use **Specific order #:** for recent orders only.
- Turn on **Use GraphQL client** for every store; it is required for POS orders and order filters.
- Review the mappings before going live – in particular the customer account and **Tax Inclusive** (Operator Guide, section 5.3).
- SparkLayer: set up customer groups, price bands and e-mail addresses in Sage first, then check the **Customer Feed List** for warnings before the first upload.
- SparkLayer: the customer feed covers every SparkLayer customer each time; schedule it outside busy hours.
- SparkLayer: price lists use each customer's price band and flat-rate discount group rules.

5. WooCommerce

5.1 What it does

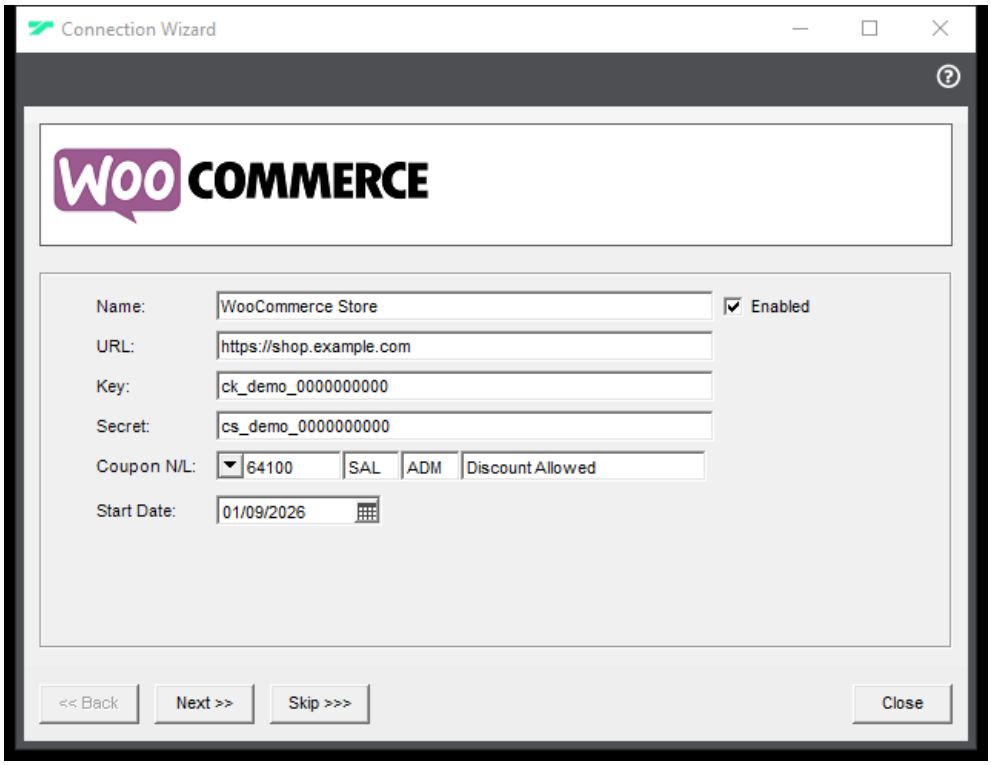
The WooCommerce channel downloads orders from a WooCommerce (WordPress) store through the WooCommerce REST API as stored orders, for conversion to Sage sales orders. Its other jobs:

- **Acknowledgement** – after conversion it can move each WooCommerce order to a status of your choice, so that your team can see it is in Sage.
- **Completion** – when the Sage order has been despatched in full, it marks the WooCommerce order as completed, with the carrier and tracking details if you choose.
- **Stock** – it can update product stock (as a quantity or as in stock / out of stock) and a price.

5.2 Setting it up

In WooCommerce, create a REST API key with read/write access (**WooCommerce** ▸ **Settings** ▸ **Advanced** ▸ **REST API**). Then on **Channels** ▸ **Channel List** click **Add** and choose **Woo Commerce** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

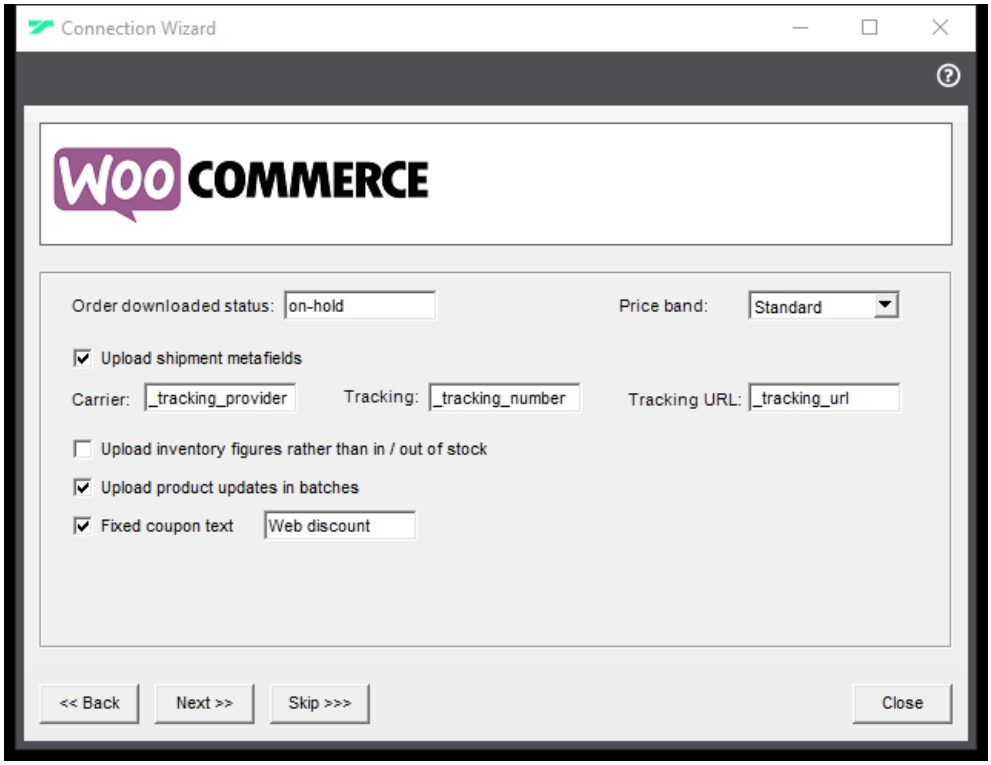
Connection page



WooCommerce – connection page

Field	What it does
Name:	The channel's name. Required.
Enabled	Switches the channel on.
URL:	Your store's web address, for example `https://shop.example.co.uk`. Required.
Key:	The REST API consumer key. Required.
Secret:	The REST API consumer secret. Keep it private. Required.
Coupon N/L:	The nominal code for the order discount line. Optional.
Start Date:	Orders created before this date are never downloaded. Set it to your go-live date. Required.

Options page



WooCommerce – options page

Field	What it does
Order downloaded status:	The WooCommerce order status set when the acknowledgement is sent, for example `on-hold` or a custom status of your own. This takes the order out of the 'processing' orders Channels downloads. Recommended.
Price band:	The Sage price band whose price is sent as the product's regular price in stock feeds. Optional.
Upload shipment metafields	Writes the carrier, tracking number and tracking link to the order's meta fields when the order is completed. Enter the meta field names in **Carrier:**, **Tracking:** and **Tracking URL:** (for example the names your tracking plugin uses). Off by default.
Upload inventory figures rather than in / out of stock	Sends stock quantities and turns on WooCommerce stock management. When off (the default), Channels sends in stock / out of stock only, or follows the settings on the stock item (below).
Upload product updates in batches	Sends stock updates 100 products at a time, which is quicker for large catalogues. Off by default.
Fixed coupon text	Uses the text you enter as the description of the discount line, instead of the coupon codes. Off by default.

Stock item settings

Each stock item's **Channels** tab (Operator Guide, section 16.8) has a **Woocommerce** tab: **Manage stock**, **Allow back orders when item out of stock** and **Manage stock back orders option:** (**Do not allow**, **Allow but notify customer** or **Allow**). When **Upload inventory figures rather than in / out of stock** is off, these decide how that product's stock is sent.



WooCommerce – stock item settings

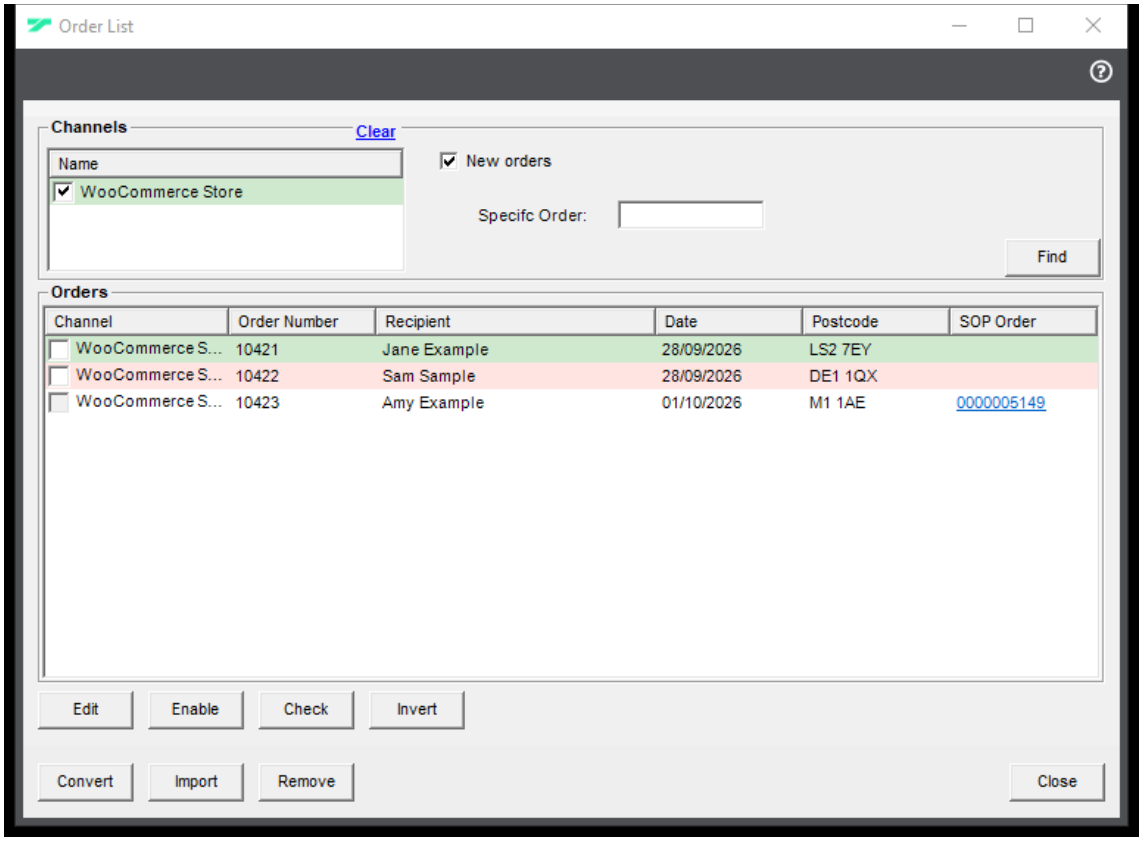
5.3 Screens

Channels ▸ **WooCommerce** has four entries: **Order List**, **Converted Order List**, **Shipment List** and **Inventory List**.

Order List

The shared order list (Operator Guide, sections 6.2 to 6.5). **Order Number** shows the WooCommerce order ID. The search options are:

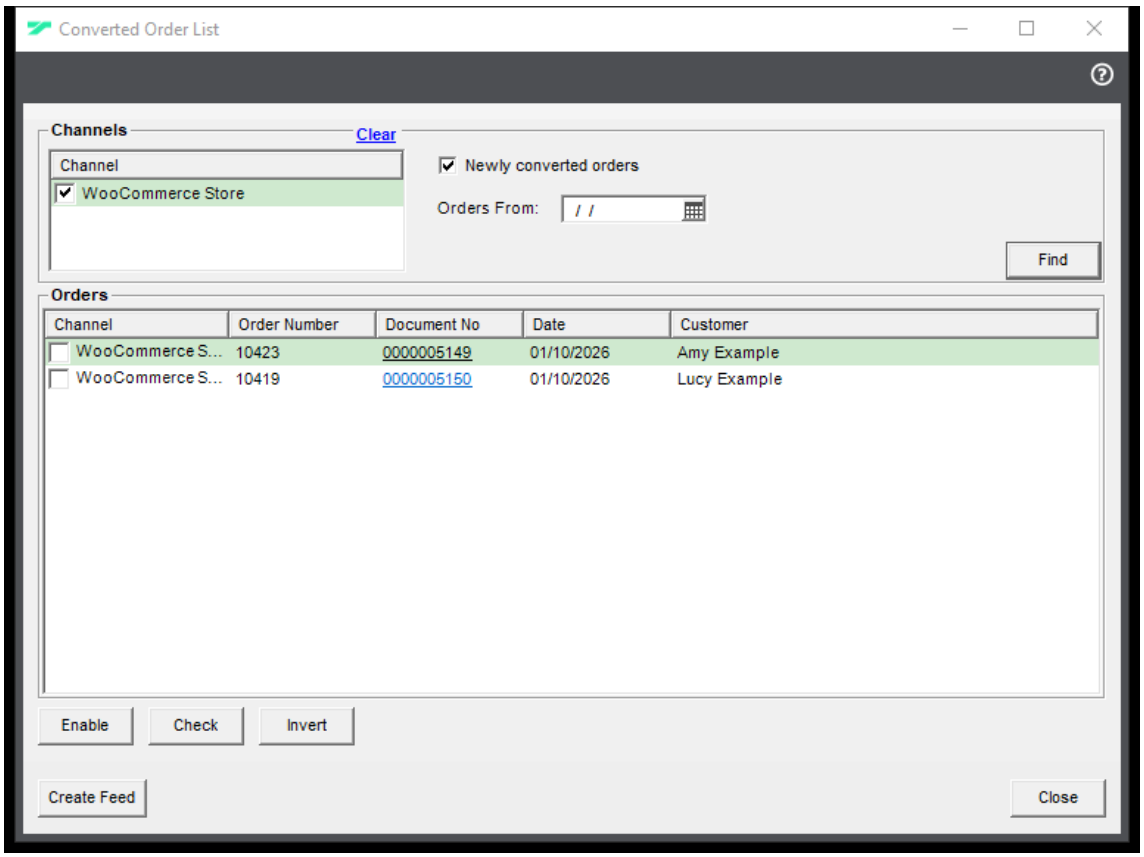
Field	What it does
New orders	Ticked when the list opens. **Find** downloads every 'processing' order created since the **Start Date:** that is not already stored.
Specific Order:	Downloads one order by its WooCommerce order ID, whatever its status.



WooCommerce – Order List

Converted Order List

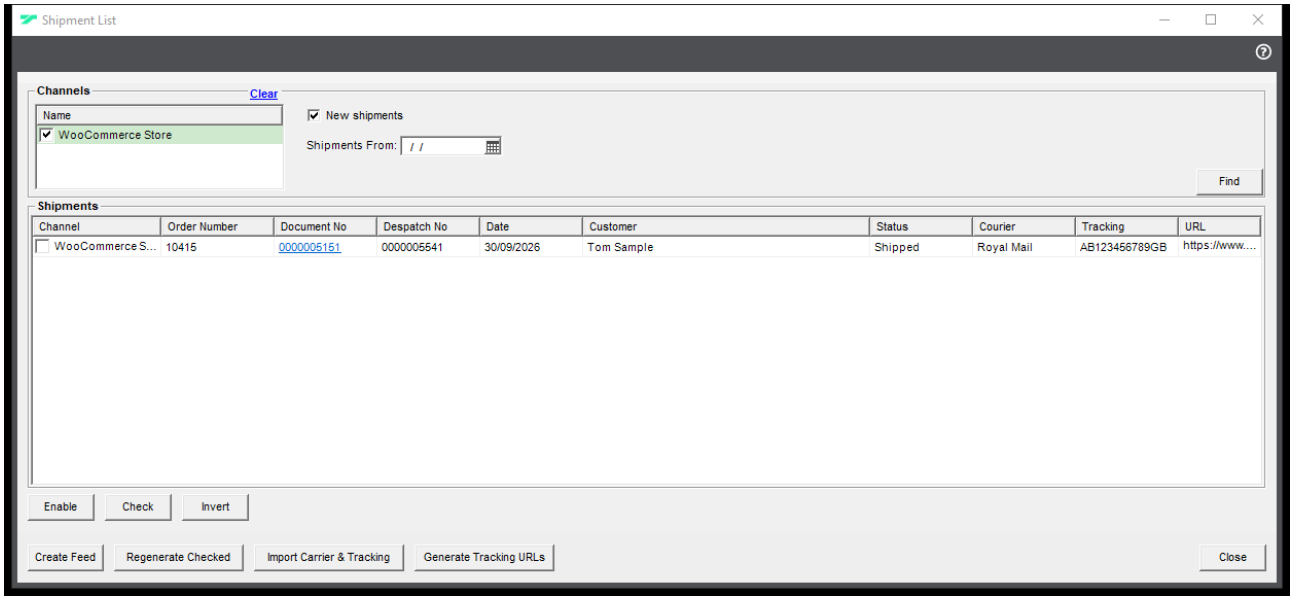
The shared **Converted Order List** (Operator Guide, section 6.11). Tick orders and click **Create Feed** to create acknowledgement export feeds; submit them from **Channels** ▸ **Export Feeds** or send them with the **Upload acknowledgement feeds** automation.



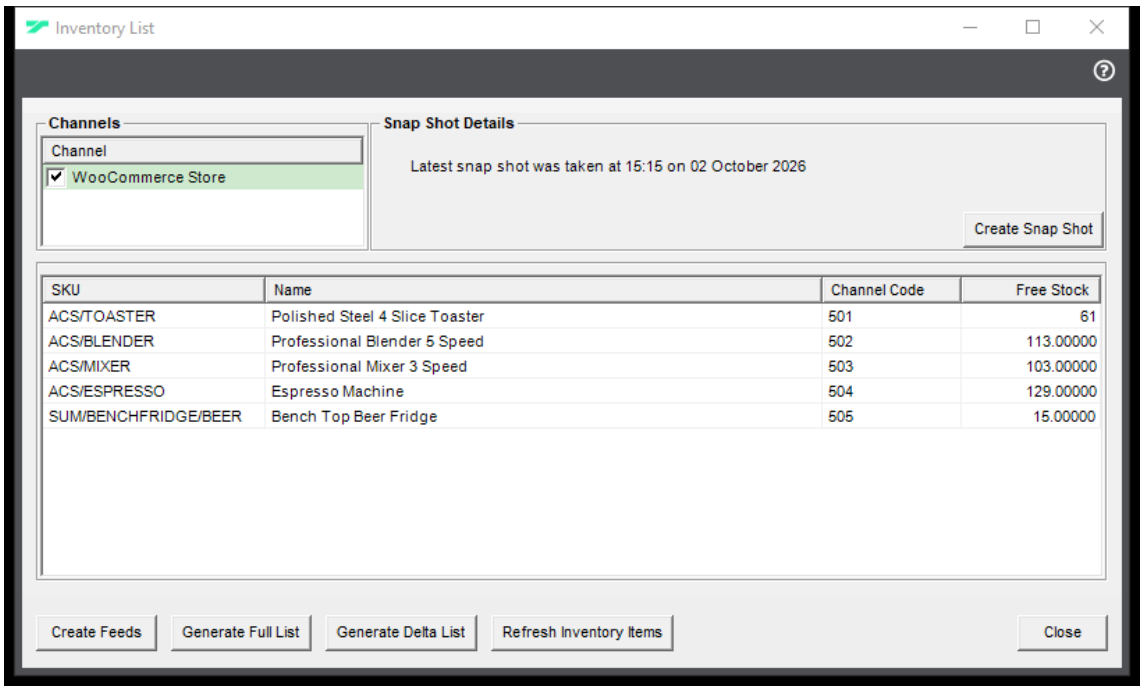
WooCommerce – Converted Order List

Shipment List and Inventory List

The shared lists (Operator Guide, sections 13.3 and 11.6). WooCommerce uses the current style of inventory list. **Refresh Inventory Items** and **Create Feeds** read the published products from WooCommerce.



WooCommerce – Shipment List



WooCommerce – Inventory List

5.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads 'processing' orders created since the start date.
Process orders	Converts the stored orders, removing any already converted.
Create acknowledgement feeds	Creates acknowledgement export feeds for converted orders not yet acknowledged.
Upload acknowledgement feeds	Sets the **Order downloaded status:** on those orders in WooCommerce.
Generate Tracking URLs	Builds tracking links for despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds	Creates export feeds for fully despatched orders whose carrier and tracking details are complete.
Upload shipment feeds	Marks the orders completed in WooCommerce.
Download inventory items	Downloads the published products so that stock can be matched by SKU.
Create inventory Snapshot	Takes the stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed	Creates a stock export feed for items whose stock has moved.
Create full inventory feed and refresh inventory items	Downloads the products again and creates a stock export feed for every item.
Upload inventory feed	Sends the stock export feeds to WooCommerce.
Clear Invoiced Delivery Details	Removes delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

5.5 Orders

- Only orders with the status 'processing' are downloaded. Each download looks at all of them since the **Start Date:**, so set an **Order downloaded status:** and run the acknowledgement automations to keep the list of open orders short.
- The WooCommerce order number becomes the Sage customer order number. Orders go on the default account `WOO001` unless you map or create customers (Operator Guide, sections 5.3 and 6.6).

- A delivery company becomes the first line of the delivery address.
- An order discount is added to the Sage order as one negative line, described by the coupon codes (or your fixed text), and posted to the **Coupon N/L:**.
- The receipt is for the order total. Order meta data is kept as order attributes that you can map.
- Check that the **Tax Inclusive** mapping matches whether your WooCommerce prices include VAT (Operator Guide, section 5.3).
- Refunds and cancellations made in WooCommerce after download are not picked up.

5.6 Inventory

- **Download inventory items** learns the SKUs of your published products.
- When a stock export feed is created, Channels reads the current WooCommerce products and sends only the products whose stock (or price) differs.
- Stock is sent as a quantity when **Upload inventory figures rather than in / out of stock** is ticked. Otherwise it is sent as in stock / out of stock, or following each stock item's **Woocommerce** settings.
- The price of the **Price band:** is sent as the regular price.

5.7 Shipments

- When the Sage order has been despatched in full, the WooCommerce order is marked completed. WooCommerce then sends its order-completed e-mail to the customer.
- With **Upload shipment metafields**, the carrier, tracking number and tracking link are written to the meta fields you named, for your tracking plugin to show.
- Export feeds appear on **Channels ▸ Export Feeds** as WooCommerce acknowledgement, shipment and inventory feeds (Operator Guide, section 14).

5.8 Points to note

- WooCommerce has no partial shipments: the order is completed once everything has been despatched.
- Stock is kept for simple products; product variations are not updated.
- **Specific Order:** takes the WooCommerce order ID, which may differ from the order number shown to customers.
- WooCommerce stock feeds need the current style of inventory list (Operator Guide, section 11.6). If your Inventory List shows the older columns, ask Tilted to change it before you send WooCommerce stock.

6. Magento

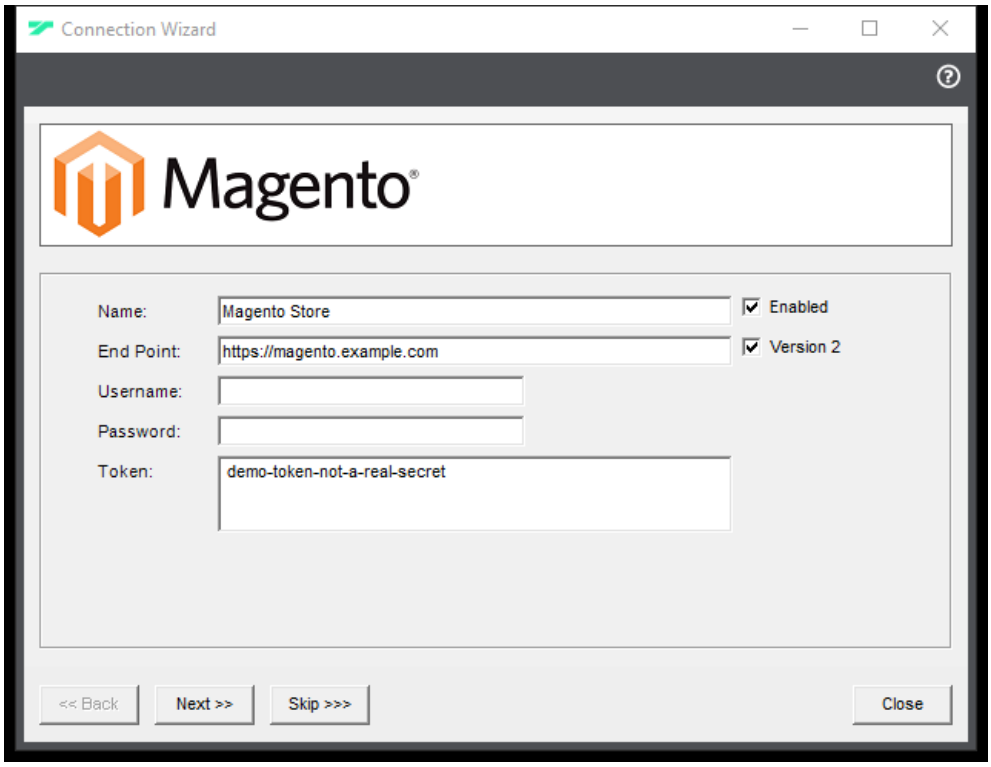
6.1 What it does

The Magento channel downloads orders from one Magento store view as stored orders, for conversion to Sage sales orders. It can find or create the Sage customer from the billing e-mail address. When you despatch in Sage it creates the Magento shipment, with tracking, including part shipments. It can also update Magento stock quantities. Magento 2 is connected through its REST API; older Magento 1 stores through the SOAP API.

6.2 Setting it up

In Magento 2, create an integration and copy its access token (**System** ▸ **Integrations**). Then on **Channels** ▸ **Channel List** click **Add** and choose **Magento** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page



Magento – connection page

Field	What it does
Name:	The channel's name. Required.
Enabled	Switches the channel on.
Version 2	Ticked (the default) for Magento 2 (token). Untick for a Magento 1 store (username and API key). Changing it clears the other version's details.
End Point:	Magento 2: the store's web address, for example `https://shop.example.co.uk`. Magento 1: the full SOAP API address. Required.
Username:	Magento 1 only: the API user.
Password:	Magento 1 only: the API key.
Token:	Magento 2 only: the integration access token. Keep it private.

Options page

The Options page reads the list of store views from Magento when it opens, so the connection details must be correct and the computer must be online.

Field	What it does
Store:	The store view this channel downloads orders from. Required.
Last Order Increment:	The Magento order number to start after. **New orders** downloads orders with a higher number and moves it on. Required.
Order Batch Size:	How many orders are downloaded per request. Default 100.
Inventory Batch Size:	Products per request when reading stock. Default 500.

Field	What it does
Set shipment notify flag on upload	Magento e-mails the customer when the shipment is created. Off by default.
Allow Inventory Feed	Includes this channel in the Inventory List and the stock automations. Off by default.
Use bill email to find customer	Finds the Sage customer by billing e-mail address (with the same currency and country), or creates one. Turn on **auto generate account reference** in Sales Ledger settings first. Off by default.
Append shipment comment	Adds the **Shipment Comment:** text to every Magento shipment, visible to the customer. Off by default.

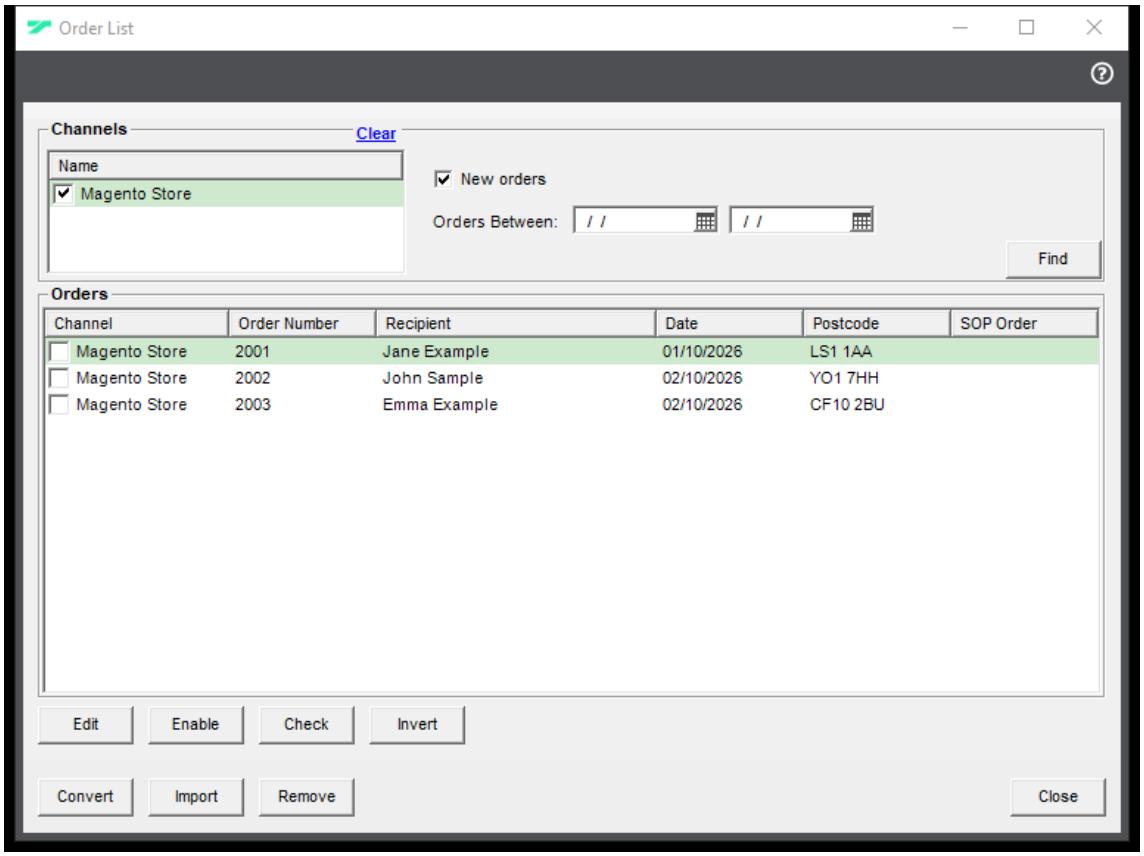
6.3 Screens

Channels ▸ **Magento** has three entries: **Order List**, **Shipment List** and **Inventory List**.

Order List

The shared order list (Operator Guide, sections 6.2 to 6.5), with these search options:

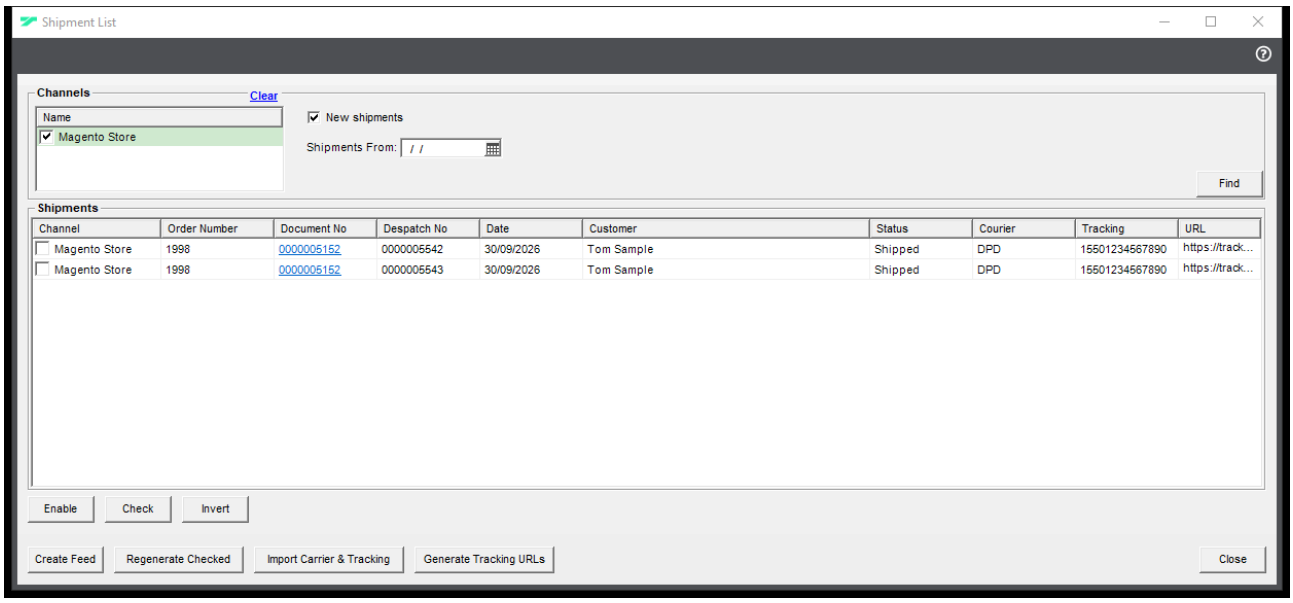
Field	What it does
New orders	Ticked when the list opens. **Find** downloads 'processing' orders numbered after the **Last Order Increment:**, then moves it on.
Orders Between:	Untick **New orders** and enter the dates to download the orders created between them, in any status.



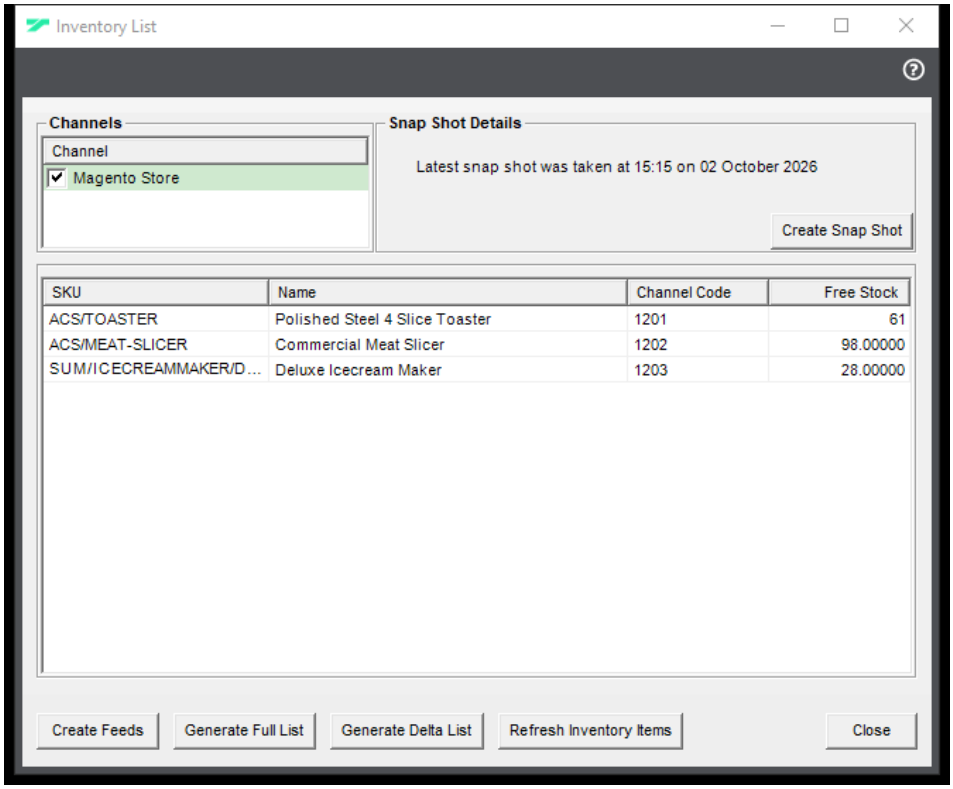
Magento – Order List

Shipment List and Inventory List

The shared lists (Operator Guide, sections 13.3 and 11.6). The Inventory List shows only channels with **Allow Inventory Feed** ticked. **Generate Full List** and **Generate Delta List** read the current stock of each product from Magento, so that you can compare it with Sage before you click **Create Feeds**.



Magento – Shipment List



Magento – Inventory List

6.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads ‘processing’ orders, including older orders that have only just reached ‘processing’.
Process orders	Converts the stored ‘processing’ orders, removing any already converted.
Generate Tracking URLs	Builds tracking links for despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds	Creates export feeds for despatches whose carrier and tracking details are complete.

Automation	What it does
Upload shipment feeds	Creates the shipments in Magento.
Create Inventory Snapshot	Takes the stock snapshot the stock feeds need (Operator Guide, section 11.3).
Create delta inventory feed	Creates a stock export feed for items whose stock has moved (channels with **Allow Inventory Feed** only).
Create full inventory feed	Creates a stock export feed for every item.
Upload inventory feed	Sends the stock quantities to Magento.
Clear Invoiced Delivery Details	Removes delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

6.5 Orders

- **New orders** and the automation take 'processing' orders. The Magento order number becomes the Sage customer order number; orders go on the default account `MAG001` unless **Use bill email to find customer** is on or you map customers (Operator Guide, sections 5.3 and 6.6).
- A customer created from the billing e-mail takes the billing name, address, country and the order currency, with a tax code to suit the delivery country.
- Each product on the order becomes a Sage line. A configurable product's line uses the chosen variant's SKU at the parent's price. Custom options are kept with the line.
- Line discounts are carried on each line, and the shipping charge includes tax.
- The receipt is for the amount paid in Magento, so an order not yet invoiced in Magento has no receipt.
- Refunds (credit memos) and cancellations made in Magento are not picked up.

6.6 Inventory

- Tick **Allow Inventory Feed**, then schedule **Create Inventory Snapshot**, one of the create inventory feed automations and **Upload inventory feed**.
- Channels compares Sage free stock with Magento and sends the quantity and in-stock flag for each product that differs. Stock is set in Magento's default stock, and needs a Magento 2 connection.

6.7 Shipments

- Each despatch creates a Magento shipment for the lines and quantities despatched in Sage, so part shipments are supported. The courier and tracking number are added as the tracking information.
- With **Set shipment notify flag on upload**, Magento e-mails the customer; with **Append shipment comment**, your comment is added to the shipment.
- Export feeds appear on **Channels** ▸ **Export Feeds** as Magento shipment and inventory feeds (Operator Guide, section 14).

6.8 Points to note

- One channel downloads one store view. Add a channel per store view.
- The Options page needs a live connection to Magento.
- Set the **Last Order Increment:** carefully at go-live: orders numbered at or below it are not downloaded by **New orders**.
- Only 'processing' orders are converted by the automation; orders still pending payment wait in Magento until they are paid.

7. SquareSpace

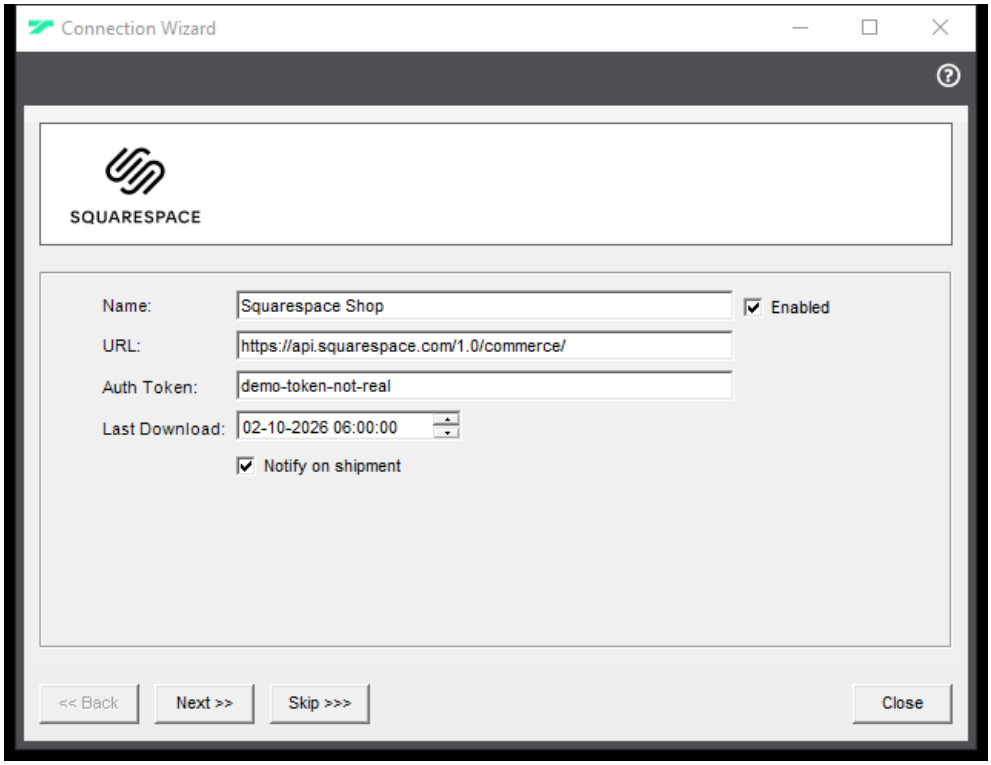
7.1 What it does

The SquareSpace channel downloads orders from a SquareSpace Commerce store as stored orders, for conversion to Sage sales orders. When you despatch in Sage it sends the fulfilment back to SquareSpace with the carrier, service, ship date, tracking number and tracking link, and SquareSpace can e-mail the customer. It can also set the stock of each product variant from Sage free stock.

7.2 Setting it up

In SquareSpace, create an API key with access to Orders and Inventory (**Settings** ▸ **Developer API Keys**). Then on **Channels** ▸ **Channel List** click **Add** and choose **Square Space** (Operator Guide, section 4.2). The wizard has one **Connection** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page



SquareSpace – connection page

Field	What it does
Name:	The channel's name. Required.
Enabled	Switches the channel on.
URL:	The SquareSpace Commerce API address. A new channel shows `https://api.squarespace.com/{api-version}/commerce/`; replace `{api-version}` with the version number, for example `1.0`. Required.
Auth Token:	Your SquareSpace API key. Keep it private. Required.
Last Download:	**New orders** downloads orders changed after this date and time, and moves it on. Set it earlier to pick up older orders. Starts at the time the channel was added.
Notify on shipment	SquareSpace e-mails the customer when the fulfilment is sent. Off by default.

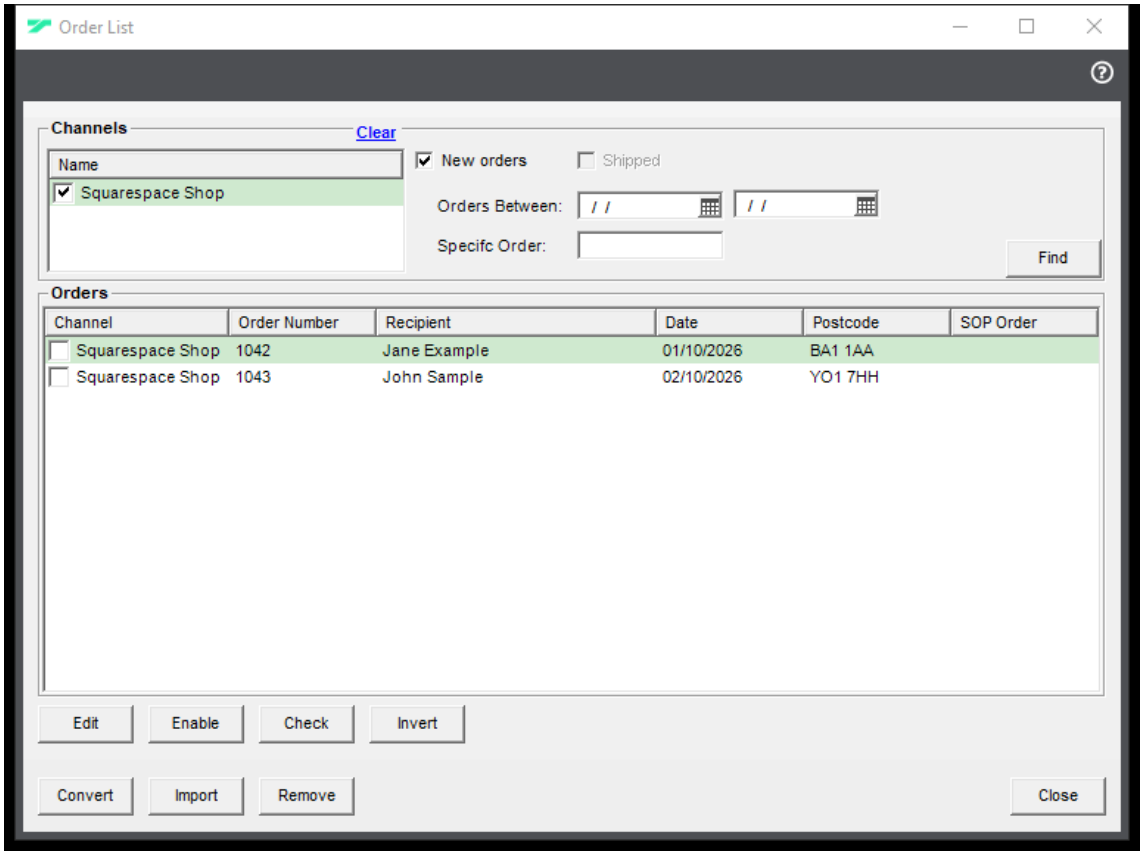
7.3 Screens

Channels ▸ **SquareSpace** has three entries: **Order List**, **Shipment List** and **Inventory List**.

Order List

The shared order list (Operator Guide, sections 6.2 to 6.5). **Order Number** is the SquareSpace order number. The search options are:

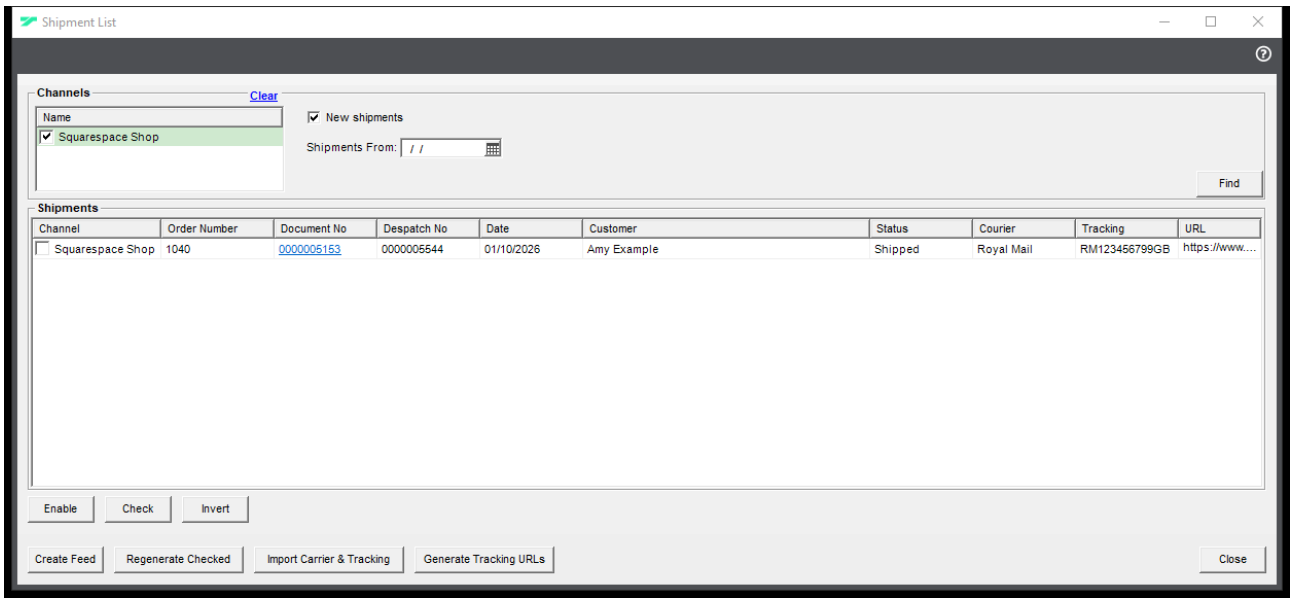
Field	What it does
New orders	Ticked when the list opens. **Find** downloads orders awaiting fulfilment that have changed since **Last Download:**.
Orders Between:	Untick **New orders** and enter both dates to download the orders changed between them that are awaiting fulfilment.
Shipped	With a date range, downloads fulfilled orders instead.
Specific Order:	Downloads one order by its SquareSpace order ID (the long ID in the order's web address, not the order number).



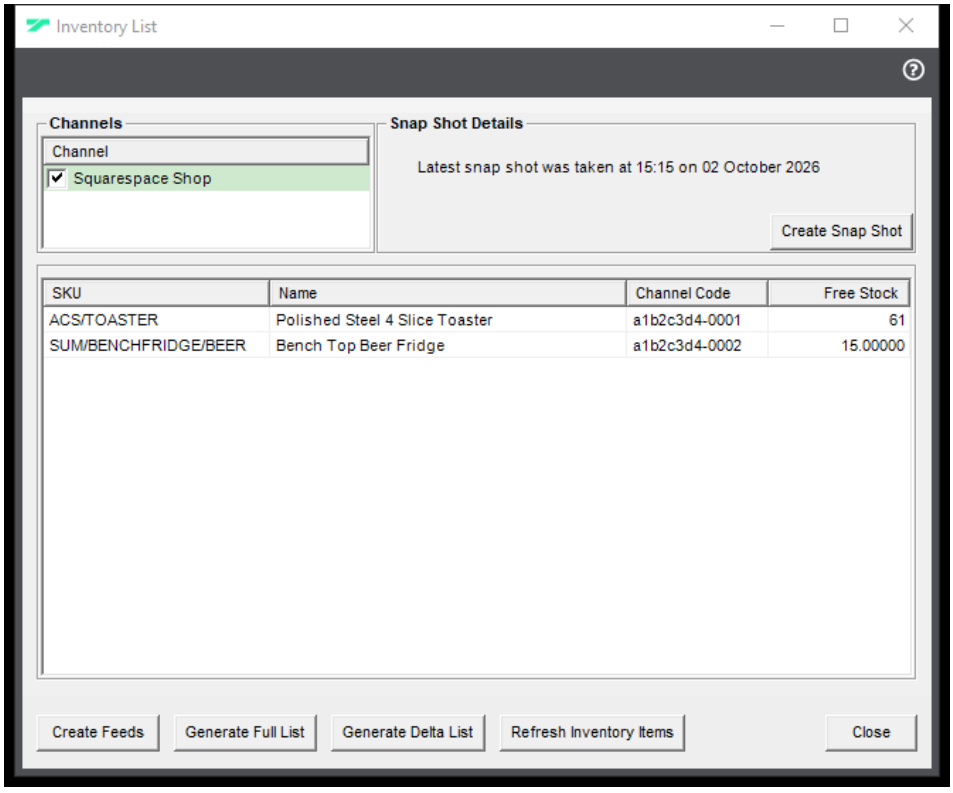
SquareSpace – Order List

Shipment List and Inventory List

The shared lists (Operator Guide, sections 13.3 and 11.6). **Create Feed** on the Shipment List creates one export feed for each despatch.



SquareSpace – Shipment List



SquareSpace – Inventory List

7.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads orders awaiting fulfilment changed since the last download.
Process orders	Converts the stored orders, removing any already converted.
Generate Tracking URLs	Builds tracking links for despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds	Creates an export feed for each despatch whose carrier and tracking details are complete.
Upload shipment feeds	Sends the fulfilments to SquareSpace.

Automation	What it does
Download inventory items	Downloads every product variant so that stock can be matched by SKU.
Create inventory Snapshot	Takes the stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed	Creates a stock export feed for items whose stock has moved.
Create full inventory feed	Creates a stock export feed for every item.
Upload inventory feed	Sends the stock levels to SquareSpace.
Clear Invoiced Delivery Details	Removes delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

7.5 Orders

- Orders awaiting fulfilment are downloaded; cancelled orders are not.
- Orders go on the default account `SQU001` unless you map or create customers (Operator Guide, sections 5.3 and 6.6).
- Each line's SKU is the Sage item code, at the price paid. Product customisations (form fields) are kept with the line.
- The shipping total is the order's shipping value, and the receipt is for the order's grand total. If you use discount codes, map the order discount (Operator Guide, section 5.3).
- Prices are treated as including VAT.
- Refunds and cancellations made in SquareSpace after download are not picked up.

7.6 Inventory

- **Download inventory items** reads every SquareSpace product variant and its SKU.
- When a stock export feed is created, Channels reads the current SquareSpace stock and sends only the variants whose stock differs from Sage free stock, as a whole-number stock level.

7.7 Shipments

- Each despatch is sent as a fulfilment of the order with the courier, service, despatch date, tracking number and tracking link.
- SquareSpace fulfils the whole order with the first fulfilment; line quantities are not sent.
- Export feeds appear on **Channels** ▸ **Export Feeds** as SquareSpace shipment and inventory feeds (Operator Guide, section 14).

7.8 Points to note

- Despatch each SquareSpace order in one go where you can, because the first fulfilment completes it.
- The date search works on the date the order was last changed, not the date it was placed.
- Products, prices and customers are not sent to SquareSpace.

8. CS-Cart

8.1 What it does

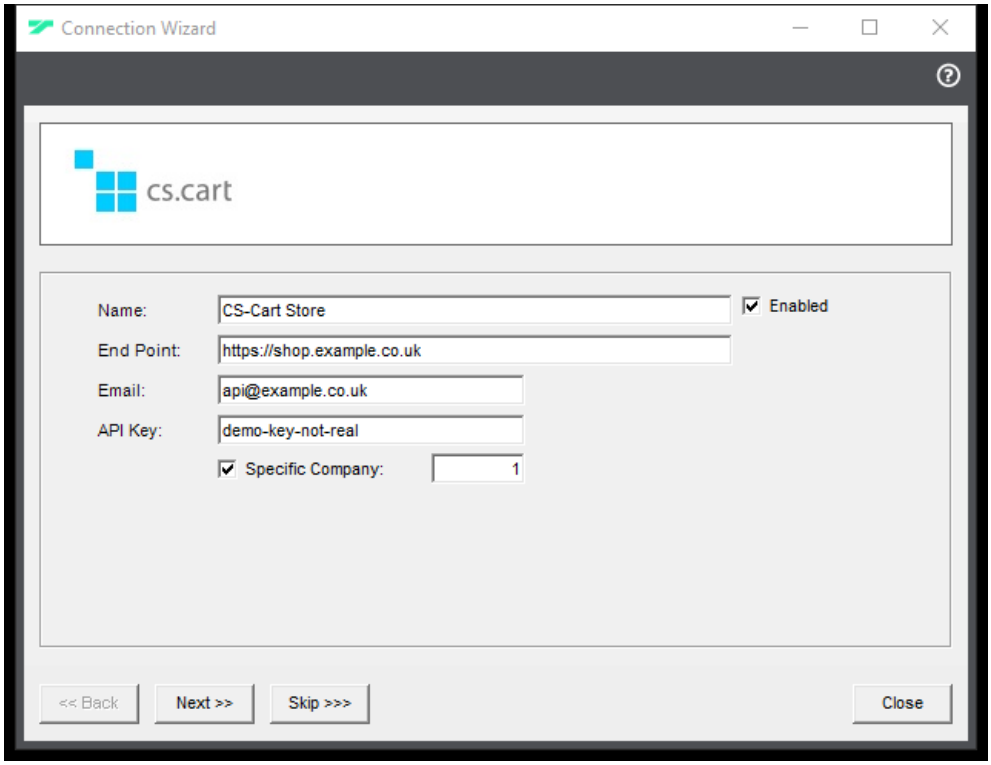
The CS-Cart channel downloads orders with the status Processed from a CS-Cart store as stored orders, for conversion to Sage sales orders. The stored order holds each order's summary; the full order (lines, addresses, coupons and notes) is read from CS-Cart when you convert it. When you despatch in Sage it

creates the CS-Cart shipment with the carrier, tracking number and shipping method. It can also set product stock from Sage free stock. On Multi-Vendor and Ultimate stores a channel can be limited to one storefront or vendor.

8.2 Setting it up

In CS-Cart, open the administrator who will connect Channels and turn on API access to get an API key. Then on **Channels** ▸ **Channel List** click **Add** and choose **CS-Cart** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

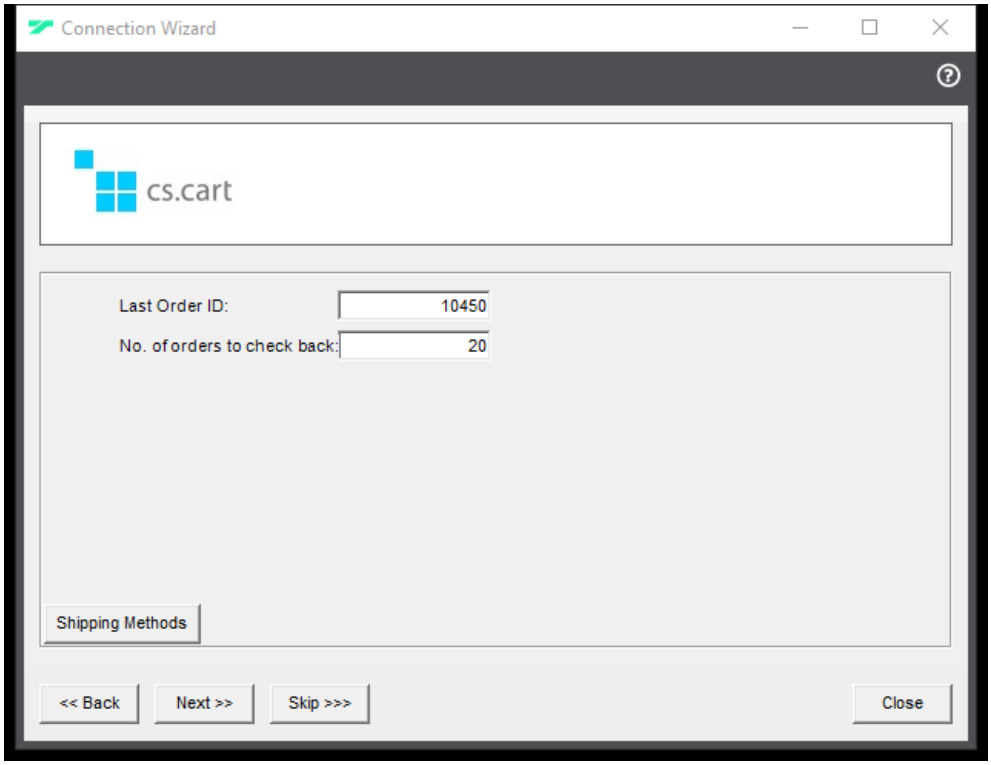
Connection page



CS-Cart – connection page

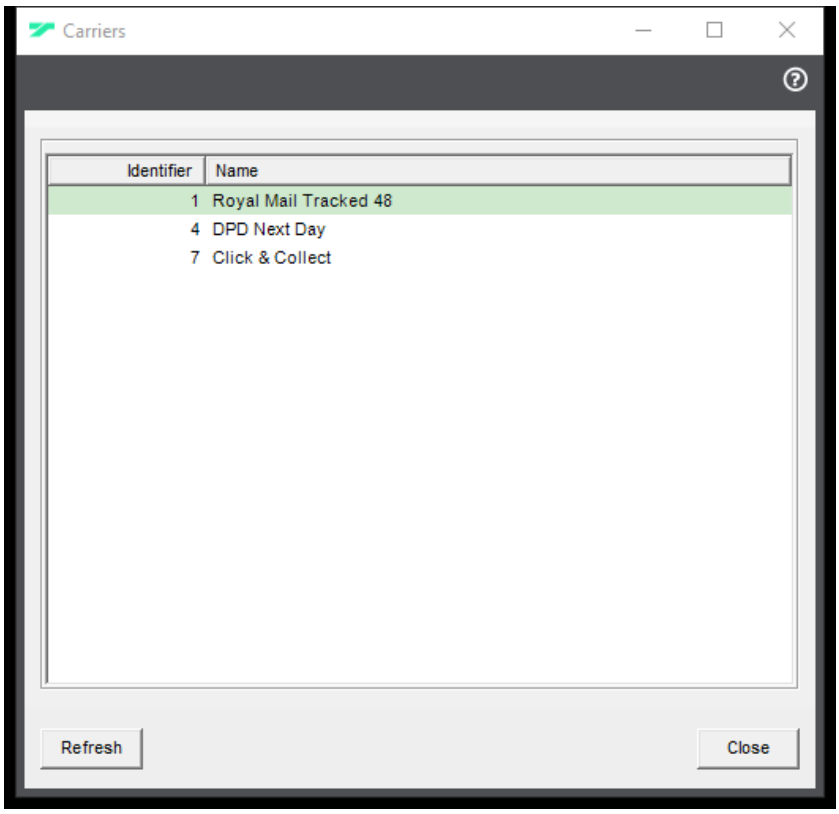
Field	What it does
Name:	The channel's name. Required.
Enabled	Switches the channel on.
End Point:	Your store's web address, for example `https://shop.example.co.uk`. Required.
Email:	The CS-Cart administrator's e-mail address. Required.
API Key:	That administrator's API key. Keep it private. Required.
Specific Company:	Tick and enter the company (storefront or vendor) ID to limit orders, products and shipping methods to it.

Options page



CS-Cart – options page

Field	What it does
No. of orders to check back:	How many order numbers below the last one downloaded to look at again, to catch orders that reached Processed late. Default 0.
Last Order ID:	The highest CS-Cart order ID already downloaded. At go-live, enter the last order you do not want in Sage. Required.
Shipping Methods	Opens **Carriers**, the CS-Cart shipping methods for this channel. Click **Refresh** to download them ("Shipping Methods have been refreshed"). Do this at set-up and whenever you add a shipping method in CS-Cart.



CS-Cart – Carriers

Then, on the **Customisation** page, open **Value Mapping** ▸ **Services** (Operator Guide, section 5.6) and map each Sage shipping service to a CS-Cart shipping method. For a CS-Cart channel the **Channel Value** is a drop-down of the methods you refreshed. You can also give a service a default tracking code for despatches without a tracking number.

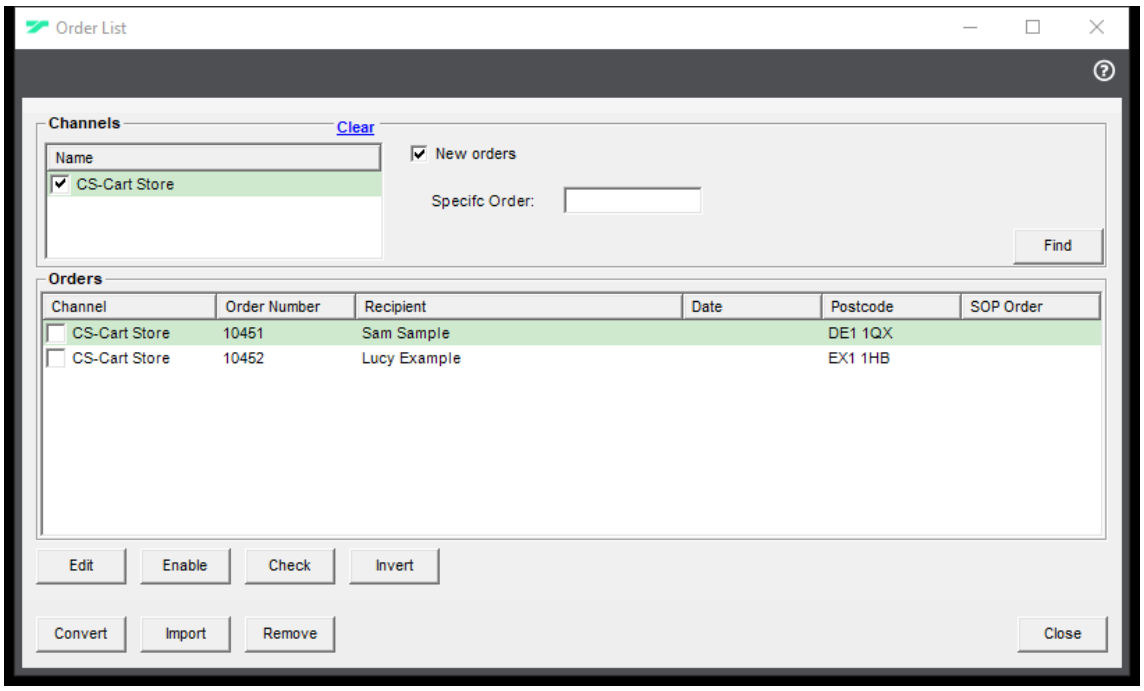
8.3 Screens

Channels ▸ **CS-Cart** has three entries: **Order List**, **Shipment List** and **Inventory List**.

Order List

The shared order list (Operator Guide, sections 6.2 to 6.5). **Order Number** is the CS-Cart order ID and **Recipient** the customer's name. The date and postcode are filled in when the order is converted. The search options are:

Field	What it does
New orders	Ticked when the list opens. **Find** downloads Processed orders numbered after the **Last Order ID:**, then moves it on.
Specific Order:	Downloads one order by its CS-Cart order ID.

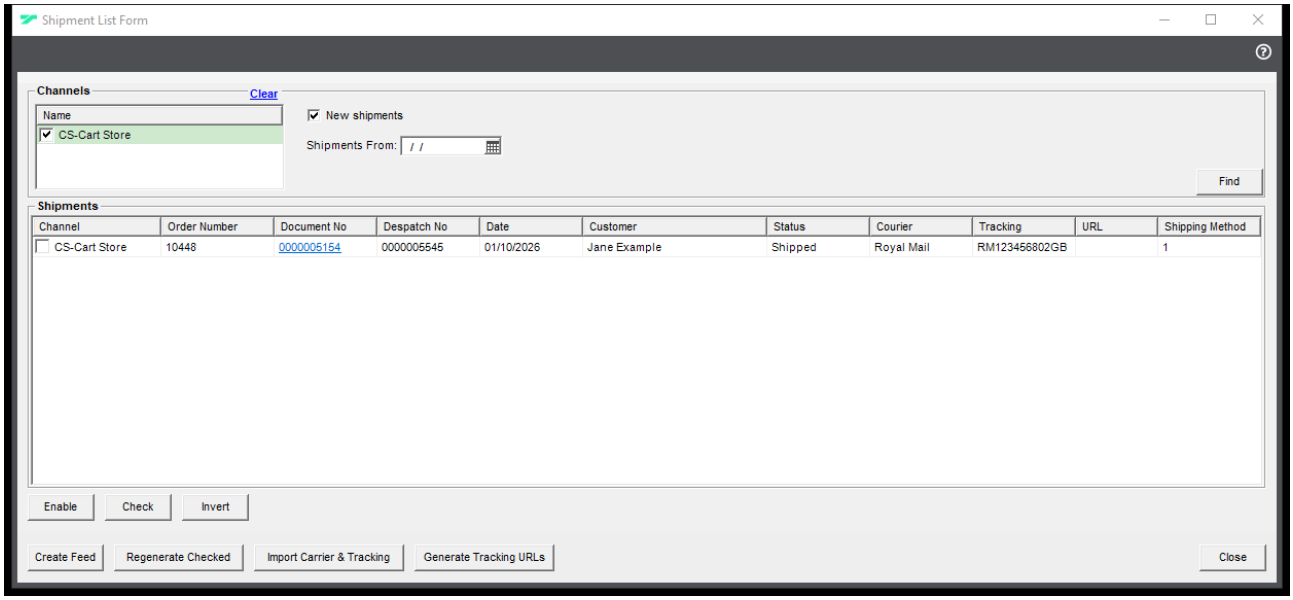


CS-Cart – Order List

Convert reads each order in full from CS-Cart, so it needs a live connection.

Shipment List

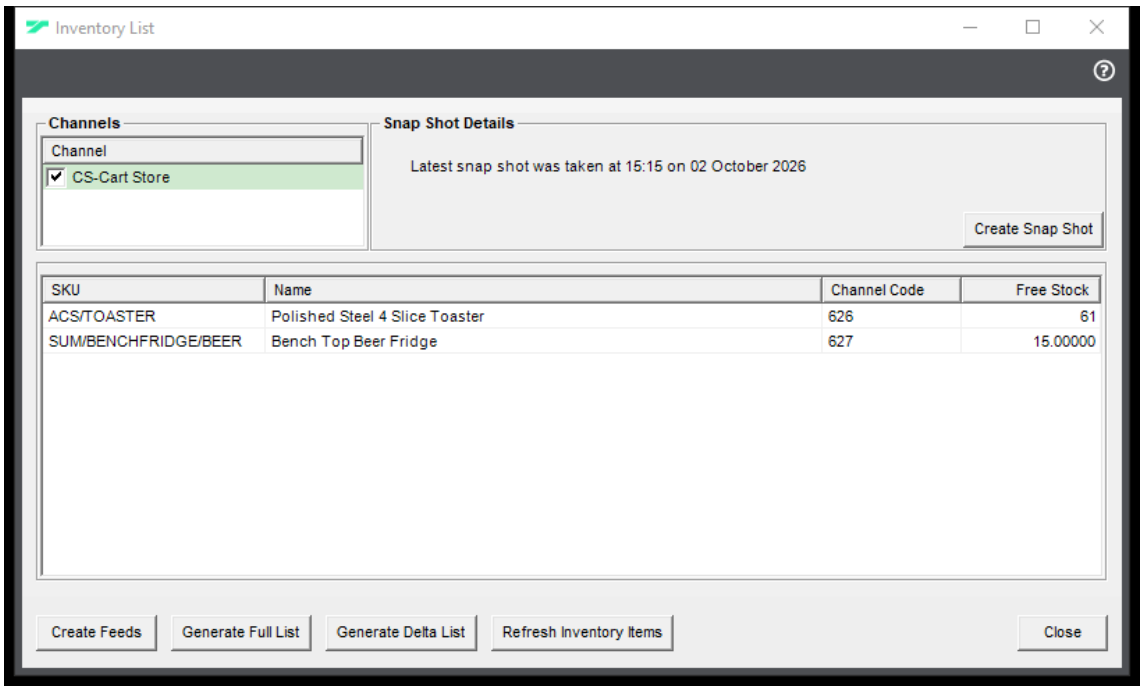
The shared shipment list (Operator Guide, section 13.3) with an extra **Shipping Method** column, filled in from the shipping service mapping. A despatch can be ticked once its carrier, tracking and shipping method are filled in. **Create Feed** creates one export feed per channel.



CS-Cart – Shipment List

Inventory List

The shared inventory list (Operator Guide, section 11.6). **Refresh Inventory Items** and **Create Feeds** read your active products from CS-Cart.



CS-Cart – Inventory List

8.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads Processed orders after the last order ID.
Process orders	Reads each stored order in full from CS-Cart and converts it, removing any already converted.
Generate Tracking URLs	Builds tracking links for despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds	Creates shipment export feeds for despatches whose details are complete.
Upload shipment feeds	Creates the shipments in CS-Cart.
Download inventory items	Downloads your active products so that stock can be matched by product code.
Create Inventory Snapshot	Takes the stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed	Creates a stock export feed for items whose stock has moved.
Create full inventory feed	Creates a stock export feed for every item.
Upload inventory feed	Sends the stock quantities to CS-Cart.
Clear Invoiced Delivery Details	Removes delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

8.5 Orders

- Only orders with the status Processed (P) are downloaded.
- The CS-Cart order ID becomes the Sage customer order number. Orders go on the default account `CSC001` unless you map or create customers (Operator Guide, sections 5.3 and 6.6).
- Lines are taken by product code at the base price, with the line discount. Discount coupons are added as one negative line naming the coupon codes; customer notes are added as a comment line.
- Carriage is not mapped on a new channel. Map **Shipping Value** if you charge for delivery (Operator Guide, section 5.3).
- The receipt is for the order total; the payment method is available to map.

- Refunds and cancellations made in CS-Cart are not picked up.

8.6 Inventory

- **Download inventory items** reads your active products; their product codes are matched to Sage item codes.
- When a stock export feed is created, Channels reads the current CS-Cart stock and sends only the products whose quantity differs from Sage free stock.

8.7 Shipments

- Each despatch creates a CS-Cart shipment for the order, with the courier, tracking number and the mapped shipping method. Channels does not change the order's status in CS-Cart.
- Export feeds appear on **Channels** ▸ **Export Feeds** as CS-Cart shipment and inventory feeds (Operator Guide, section 14).

8.8 Points to note

- Converting orders needs a live connection to CS-Cart.
- Map every Sage shipping service to a CS-Cart shipping method, or despatches cannot be ticked on the Shipment List.
- Products without a product code are not included on Sage orders or in stock feeds.
- Stock is set at product level; stock held against option combinations is not updated.

9. eBay

9.1 What it does

The eBay channel connects one eBay seller account to Sage 200. It downloads paid eBay orders as stored orders so that you can convert them into Sage sales orders, sends despatch and tracking details back to eBay when you despatch, and keeps the quantities on your existing eBay listings in step with your free stock. It does not create or end listings and does not change prices.

The connection uses eBay's Trading API and an eBay user token that the seller authorises from the wizard. The eBay developer keys behind the connection are supplied with your Tilted Channels licence, so there is nothing to enter for them.

9.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Ebay** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

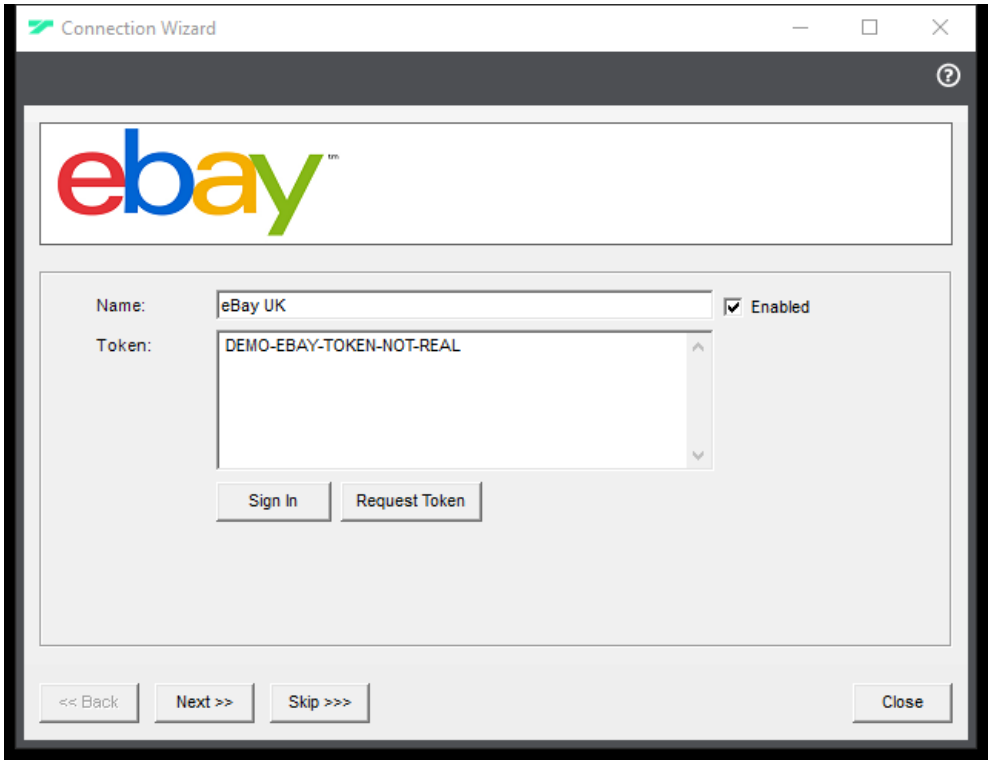
Connection page

Field	What it does
Name:	The channel name shown in every Channels list. Required – “You need to provide a name”.
Enabled	Switches the channel on. Disabled channels are skipped by every automation.
Token:	The eBay user token. It is filled in for you by **Request Token**. Required – “You need to provide the token”. Treat it like a password.
Sign In	Opens eBay's sign-in and consent page in your browser so that the seller can allow Tilted Channels to use the account.

Field	What it does
Request Token	After the seller has agreed in the browser, collects the token from eBay and places it in **Token:**.

1. Click **Sign In**. Your browser opens eBay's sign-in page.
2. Sign in as the eBay seller and agree to the request.
3. Return to the wizard and click **Request Token**. The token appears in **Token:**.
4. Click **Next >>**.

> **Request Token** only works after **Sign In** in the same wizard session; otherwise you see “Please ensure you authorise first”.

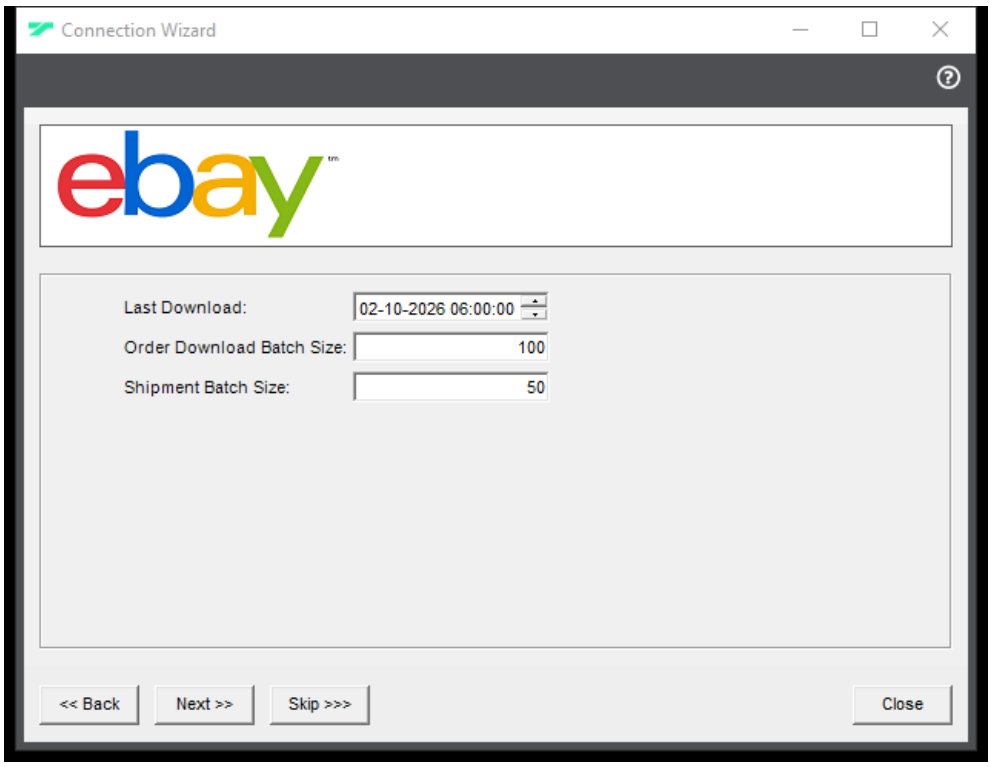


eBay – connection page

Options page

Field	What it does
Last Download:	The date and time from which **New orders** downloads start. It moves forward after every new-orders download. Defaults to midnight today.
Order Download Batch Size:	How many orders are requested from eBay at a time. Must be greater than zero; 100 is a sensible value.

If a batch size is zero you see “You need to supply batch sizes greater than zero”.



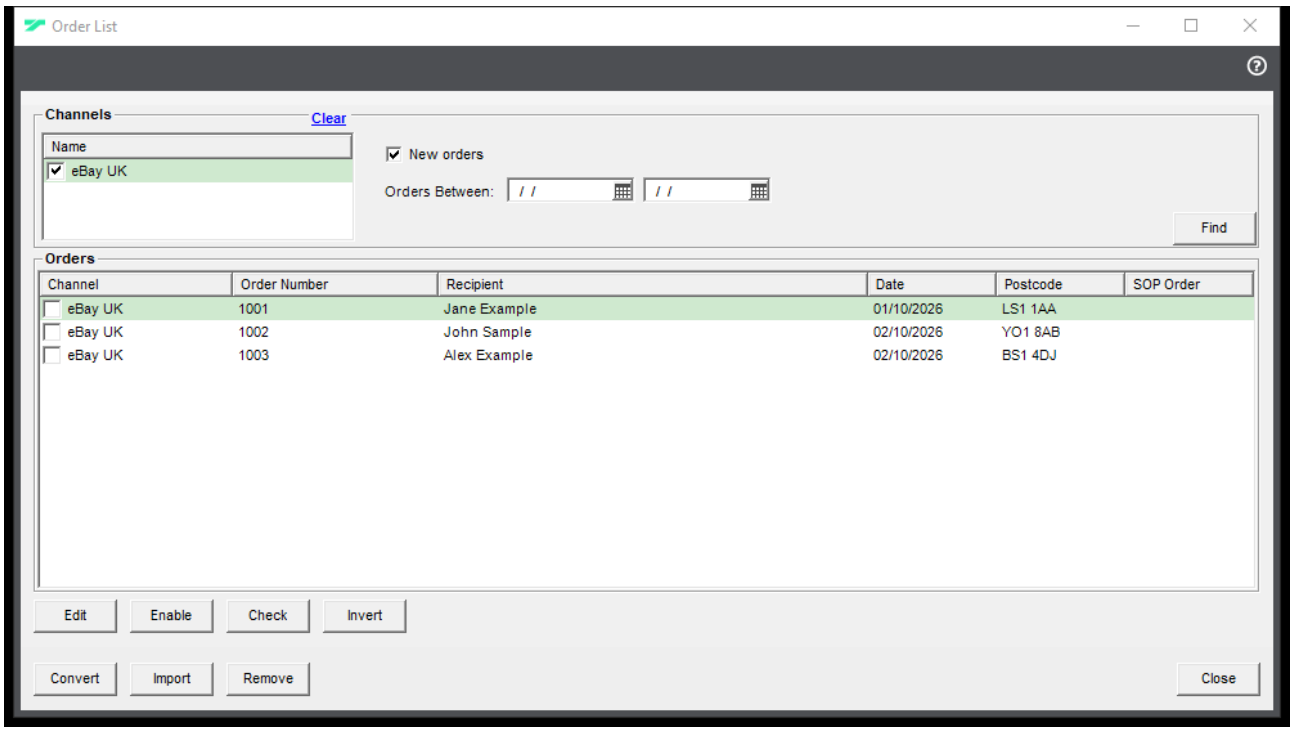
eBay – options page

9.3 Screens

Channels ▸ **Ebay** has three entries: **Order List**, **Shipment List** and **Inventory List**. They are the shared lists (Operator Guide, sections 6.2, 13.3 and 11.6); what is particular to eBay is described here.

Order List

- **New orders** (ticked when the screen opens): **Find** downloads the paid orders created since **Last Download:**, with a two-hour overlap so that nothing at the boundary is missed, and then moves **Last Download:** on.
- Untick **New orders** and fill in **Orders Between:** to download a date range. A from date is required ("You need to provide a 'from date'"); the to date defaults to today and includes the whole day.
- Only completed (paid) orders are downloaded. **Order Number** shows the eBay sales record number.
- Opening the screen does not contact eBay; only **Find** does.



eBay – Order List

Shipment List

Create Feed creates one export feed for each despatch. The export feeds are sent by the **Upload shipment feeds** automation or submitted from **Channels** ▸ **Export Feeds** (Operator Guide, section 14).

Inventory List

eBay always uses the current style of inventory list. The grid shows **SKU**, **Name**, **Channel Code** (the eBay item number) and **Free Stock**.

Button	What it does
Refresh Inventory Items	Reads your eBay listings and records one line per SKU (one per variation for variation listings). It looks back over several years of listings, so it can take some minutes on a large account.
Generate Full List / **Generate Delta List**	Builds the list in Sage from the latest stock snapshot – no call to eBay.
Create Feeds	Creates the stock export feed. For a full list, eBay's current quantities are read first so that only listings whose quantity differs are sent.

9.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	The same as **Find** with **New orders** ticked.
Download last 7 days orders, **Download last 3 days orders**, **Download last 1 days orders**	Download every paid order created in that period. Orders already in Sage are dropped when they are processed, so these are safe to schedule as a catch-up sweep.
Process orders	Converts the stored orders into Sage sales orders. Orders that are already in Sage are removed from the list.
Generate Tracking URLs	Fills in tracking links on despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds / **Upload shipment feeds**	Creates and sends shipment export feeds for despatches with a courier and tracking number.
Download inventory items	The same as **Refresh Inventory Items**.

Automation	What it does
Create inventory Snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed / Create full inventory feed	Creates a stock export feed. Skipped while inventory feeds are paused (Operator Guide, section 11.2).
Upload inventory feed	Sends the stock export feeds to eBay.
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

9.5 Orders

- Each stored order keeps the eBay order ID; each line keeps eBay's order line ID, which is used when the despatch is sent back.
- For a variation listing, the variation's SKU is used as the item code.
- For Global Shipping Programme orders, the delivery address is eBay's UK hub address.
- When an order is converted, Channels checks eBay's payment details. If the payment has not cleared, or the payment method is not one eBay treats as paid (PayPal, card, direct debit and similar), the sales order is placed **On Hold** and no receipt is recorded. Otherwise a receipt for the amount paid is created.

The default field mappings (change them in **Field Mapping** – Operator Guide, section 5.3):

Sage field	Filled from
Customer Account Number	**EBAY** (fixed) – create this customer in Sage or change the mapping.
Customer Document No	The eBay sales record number.
Delivery Name, Address 1–4, City, Post Code, Phone Number	The shipping address on the order.
Email Address	The buyer's e-mail address.
Tax Inclusive	Yes – eBay prices include VAT.
Payment Value	The amount paid.
Shipping Value, Shipping Method	The postage charged and the service the buyer chose.
Item Code, Quantity, Unit Price	The SKU, the quantity bought and the price paid.

There is no default mapping for the delivery country; add one if you sell outside the UK. The buyer's checkout message is available to map as **BuyerCheckoutMessage**.

9.6 Inventory

- The quantity sent for each listing is your Sage free stock, never less than zero. Prices are not changed.
- Listings are matched by eBay item number and SKU, so every listing (and variation) needs a SKU that matches a Sage item code or alias (Operator Guide, section 9.1).
- Large export feeds are sent in small batches with pauses between them to stay within eBay's limits.

9.7 Shipments

- Each despatch marks the eBay order as shipped, with the tracking number and the carrier taken from the despatch's **Courier**. Use courier mapping so that the courier is a carrier name eBay recognises (Operator Guide, section 13.4).
- The despatched lines and quantities are included, with the country of origin given as GB. Part despatches are supported; each line is sent once.

9.8 Points to note

- An eBay user token lasts about 18 months. When it expires, edit the channel, click **Sign In** and then **Request Token** again.
- If Channels shows “You need to setup the Tilted Ebay security settings first.”, the eBay keys are missing from your licence – contact Tilted.
- Keep date ranges short; eBay limits how far back an order search can go.

10. Etsy

10.1 What it does

The Etsy channel connects one Etsy shop to Sage 200 through Etsy's current API and Etsy's secure sign-in. It downloads paid receipts (Etsy's name for orders) as stored orders so that you can convert them into Sage sales orders, and sends tracking back to Etsy when you despatch. It also reads your listings' stock so that you can compare it with Sage, but it does not change quantities on Etsy.

Before you start

- Register your own app with Etsy (Etsy ▸ **Your account** ▸ **Manage your apps**). Etsy gives you a **keystring** and a **shared secret**.
- Add the callback address Tilted gives you to the app's list of callback URLs, exactly as supplied.
- The shop owner must be available to approve the connection in a browser.

10.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Etsy** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

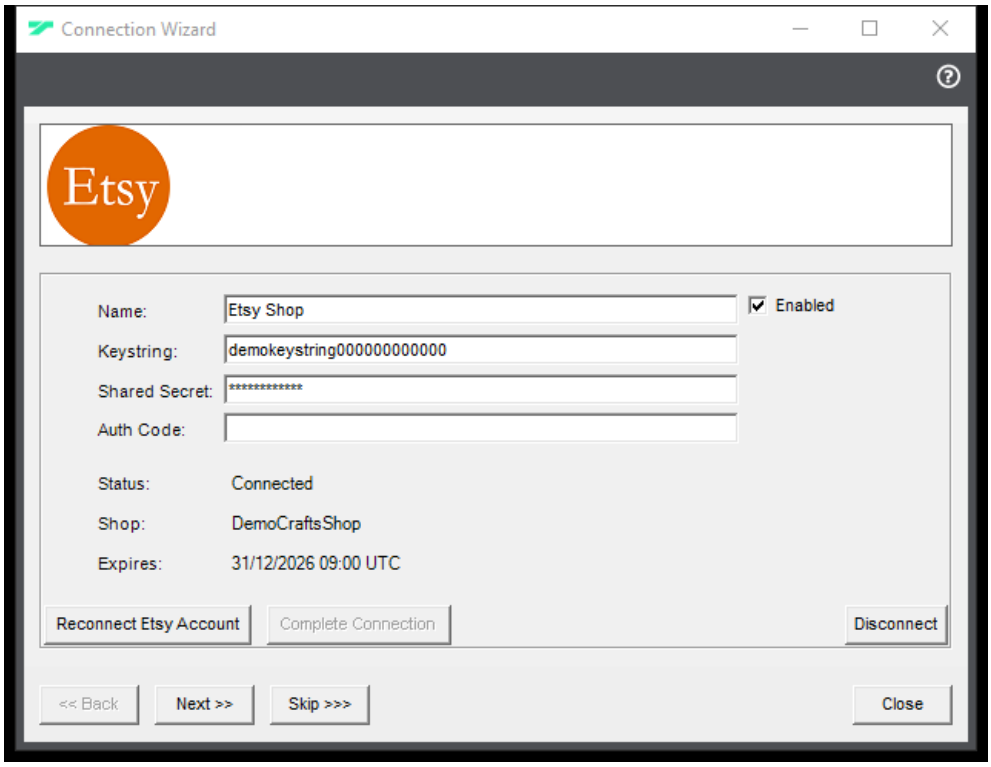
Connection page

Field	What it does
Name:	The channel name. Required – “You need to provide a name”.
Enabled	Switches the channel on.
Keystring:	Your Etsy app's keystring. Needed before you can connect – “You need to enter the Etsy app keystring first”.
Shared Secret:	Your Etsy app's shared secret (hidden as you type). Etsy requires it on every request.
Connect Etsy Account (**Reconnect Etsy Account** once connected)	Opens Etsy's consent page in your browser.
Auth Code:	Where you paste the connect code that appears in the browser after the shop owner approves.
Complete Connection	Finishes the connection with Etsy, then looks up the shop.
Disconnect	Removes the connection (the keystring and shared secret are kept). Order downloads stop until you reconnect.
Status:	**NotConnected**, **Connected**, **ReconnectRequired** or **Revoked**.
Shop:	The connected Etsy shop.
Expires:	When the sign-in expires if it is not used. Every refresh extends it by 90 days.

1. Enter the **Keystring:** and **Shared Secret:**.
2. Click **Connect Etsy Account**. Channels shows “Approve the connection in your browser, then paste the code shown into 'Auth Code' and click 'Complete Connection'.”

3. In the browser, sign in as the shop owner and approve. The page then shows a connect code.
4. Paste the code into **Auth Code:** and click **Complete Connection**. You see “Connected to Etsy shop '<shop name>'.” and **Status:** changes to **Connected**.
5. Click **Next >>**.

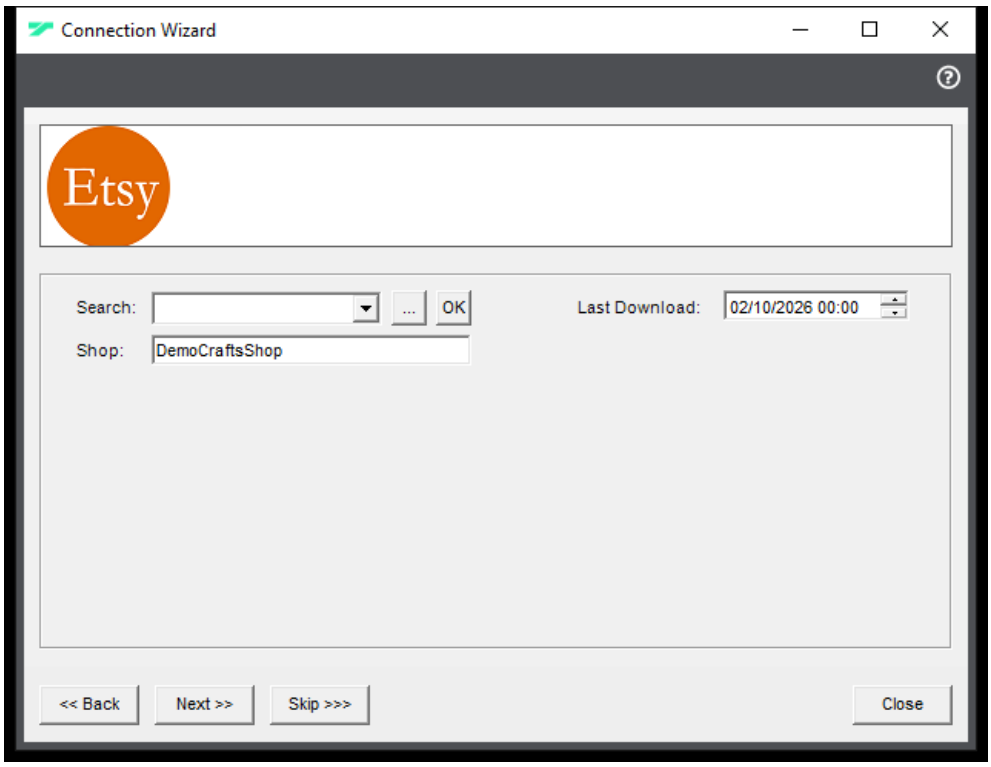
> You can leave the page without connecting – you see “The Etsy account is not connected yet - use 'Connect Etsy Account' to authorise before downloading orders.” – but nothing is downloaded until the connection is completed.



Etsy – connection page

Options page

Field	What it does
Search: and **...**	Searches Etsy shops by name. Only needed to change the shop – it is normally set when you connect.
OK (beside **...**)	Uses the shop selected in **Search:** for this channel.
Shop:	Shows the shop the channel downloads from.
Last Download:	Receipts created after this date and time are downloaded by **New orders**. Defaults to midnight today. Required – “You need to choose the last download date/time”.



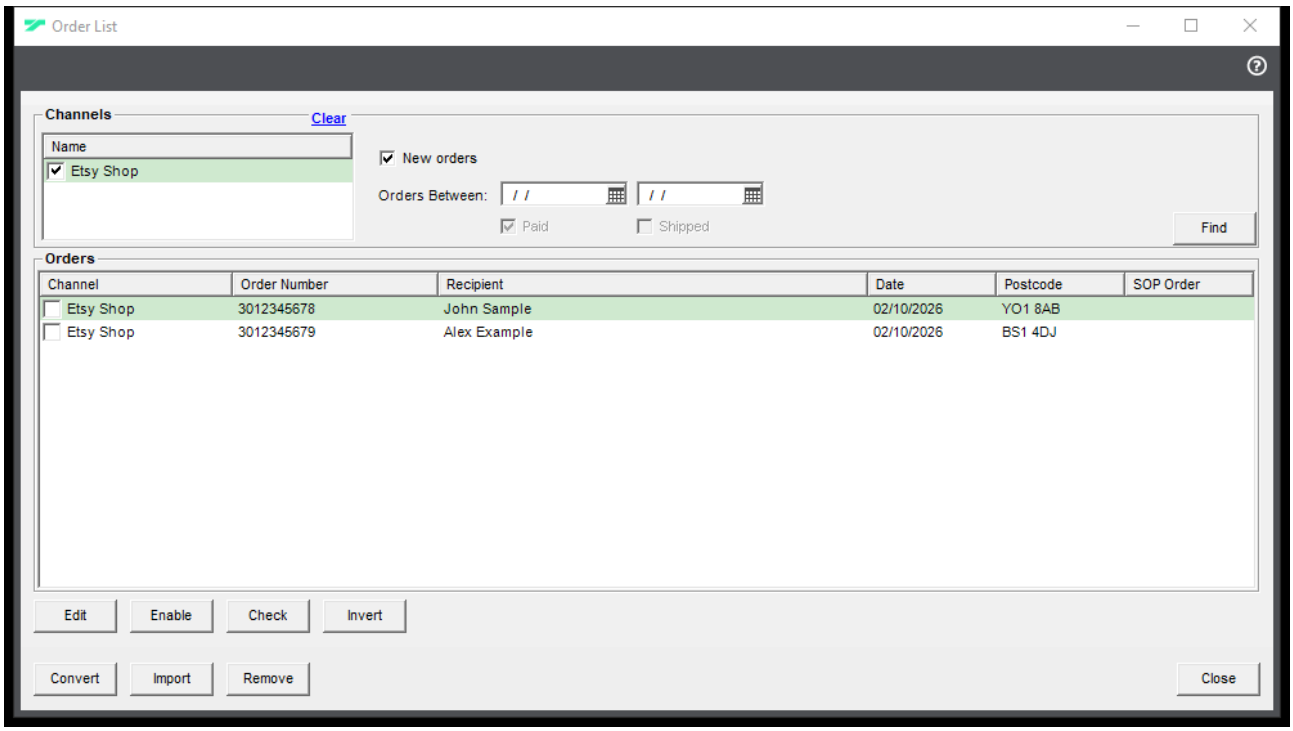
Etsy – options page

10.3 Screens

Channels ▸ **Etsy** has three entries: **Order List**, **Shipment List** and **Inventory List**. They are the shared lists (Operator Guide, sections 6.2, 13.3 and 11.6); what is particular to Etsy is described here.

Order List

- **New orders** (ticked when the screen opens): **Find** downloads paid, unshipped receipts created since **Last Download:**, then moves **Last Download:** on. **Paid** and **Shipped** do not apply.
- Untick **New orders** to search **Orders Between:** two dates (a from date is required – "You need to provide a 'from date'"). **Paid** and **Shipped** then choose which receipts are included.
- Each receipt needs several requests to Etsy and Channels paces them to stay within Etsy's limits, so a large download takes a few minutes.
- **Order Number** is the Etsy receipt number. Opening the screen does not contact Etsy.



Etsy – Order List

Shipment List

Create Feed puts all the ticked despatches for a channel into one export feed.

Inventory List

The grid shows **SKU**, **Name**, **Channel Code** (the Etsy product) and **Free Stock**. **Refresh Inventory Items** reads your active listings and their stock from Etsy. **Create Feeds** compares Sage with Etsy and lists the differences **for review only** – Channels does not send stock to Etsy.

10.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	The same as **Find** with **New orders** ticked.
Process orders	Converts the stored receipts. Receipts already in Sage are removed from the list.
Generate Tracking URLs	Fills in tracking links on despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds / Upload shipment feeds	Creates and sends shipment export feeds.
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).
Refresh Etsy Tokens	Renews the Etsy sign-in. Schedule it weekly so that a quiet shop never reaches its **Expires:** date. It does nothing when the status is **ReconnectRequired** or **Revoked**.

There are no stock automations for Etsy.

10.5 Orders

- Each stored order keeps the Etsy receipt number; each line keeps the Etsy transaction number.
- The item code comes from the SKU on the listing's product, so every Etsy listing needs SKUs that match Sage item codes or aliases (Operator Guide, section 9.1).

- If the receipt has a discount, a **Discount** line for the discount value (as a negative amount) is added to the sales order.
- Also available to map: the buyer's e-mail address, gift message, gift wrap, personalisation (per line) and the despatch-by date.

The default field mappings (change them in **Field Mapping** – Operator Guide, section 5.3):

Sage field	Filled from
Customer Account Number	**ETSY** (fixed).
Customer Document No, Document Date	The receipt number and the date it was created.
Delivery Name, Address 1–4, City, County, Post Code, Country Code, Contact	The buyer's name and shipping address.
Tax Inclusive	Yes.
Payment Bank, Payment Value	Your first Sage bank account, and the receipt's grand total.
Shipping Value	The postage charged.
Item Code, Quantity, Unit Price	The product SKU, quantity and price.

10.6 Inventory

Stock is read from Etsy for comparison only. Keep Etsy quantities up to date in Etsy itself.

10.7 Shipments

- Each despatch marks the whole Etsy receipt as shipped, with the tracking number and the carrier name from the despatch's **Courier**. Line quantities are not sent, so the first despatch of a part-despatched order marks the receipt shipped.
- Etsy e-mails the seller a copy of each shipping notification.

10.8 Points to note

- If **Status:** shows **ReconnectRequired** or **Revoked**, edit the channel and click **Reconnect Etsy Account**.
- **New orders** only collects receipts that are already paid.
- Etsy's request limits apply to your Etsy app as a whole – avoid running several Etsy downloads at the same time.

11. Temu

11.1 What it does

The Temu channel connects a Temu seller account. It downloads orders that are waiting to be shipped, with their delivery details, as stored orders so that you can convert them into Sage sales orders; it confirms despatches back to Temu with the carrier, tracking number and Temu warehouse; and it sets the stock level of each Temu SKU from your free stock. Temu orders arrive without prices – the Sage lines are priced from Sage.

Before you start

- You need Temu's **app key**, **secret key** and an **access token** for the seller account. Tilted will help you obtain these through Temu's seller authorisation.

- Temu only accepts requests from approved internet addresses. The address of the server that runs Channels must be registered with Temu before anything will work.

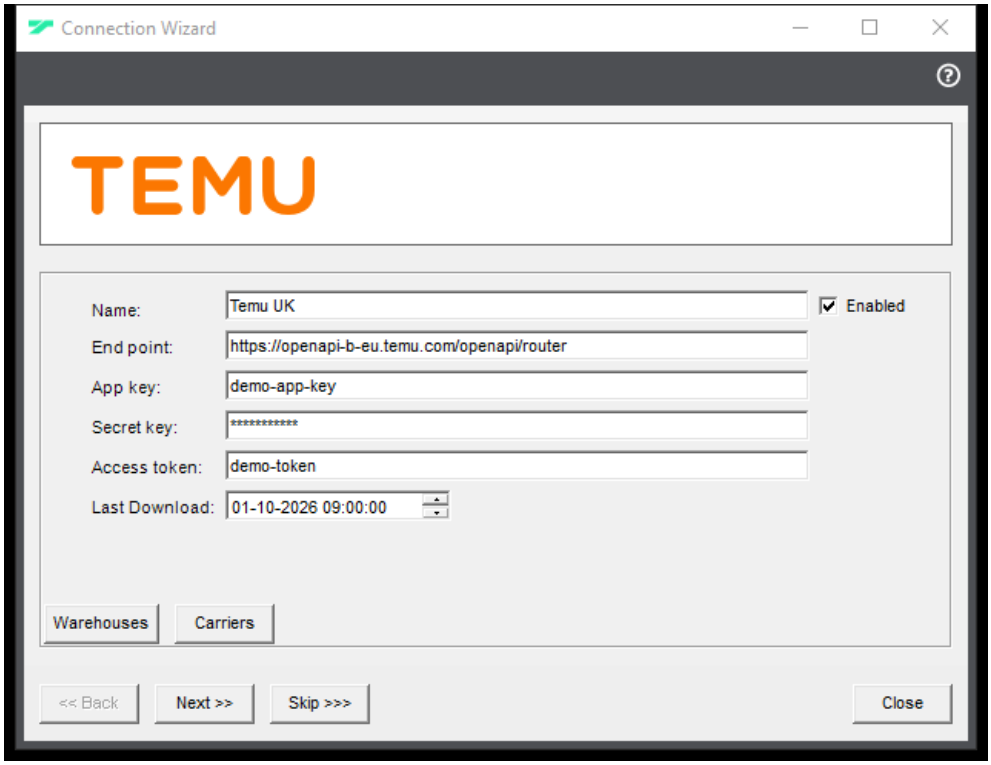
11.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Temu** (Operator Guide, section 4.2). The wizard has one **Connection** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The channel name. Required – "You need to provide a name".
Enabled	Switches the channel on.
End point:	Temu's API address. Filled in with Temu's European address; change it only if Tilted tells you to. Required – "You need to enter an end point".
App key:	Required – "You need to enter an app key".
Secret key:	Hidden as you type. Required – "You need to enter a secret key".
Access token:	The seller's access token. Required – "You need to enter an access token".
Last Download:	Orders created after this date and time are downloaded by **New orders**. Defaults to this time yesterday.
Warehouses	Opens the list of Temu's ship-from warehouses, to link them to Sage warehouses (below).
Carriers	Opens the list of Temu's carriers (below).

Fill in the connection settings, then set up carriers and warehouses – both are needed before despatches can be confirmed.



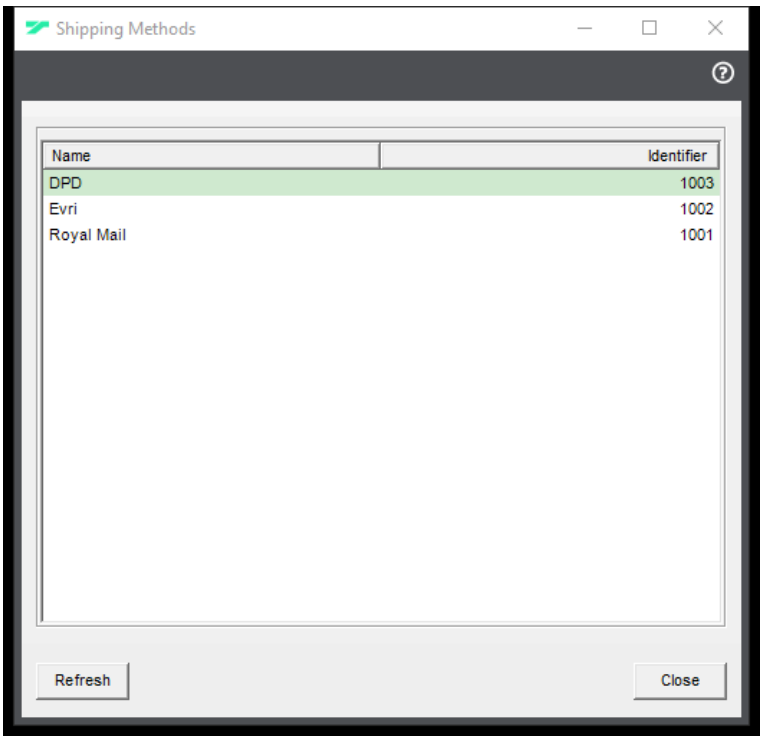
Temu – connection page

Carriers

Carriers opens the **Shipping Methods** window, which lists Temu's UK carriers (**Name**, **Identifier**). Click **Refresh** to download the current list ("Carriers have been refreshed"). Refresh also adds an empty courier

mapping for each new carrier name; map your Sage couriers to Temu carrier names there (Operator Guide, sections 5.5 and 13.4).

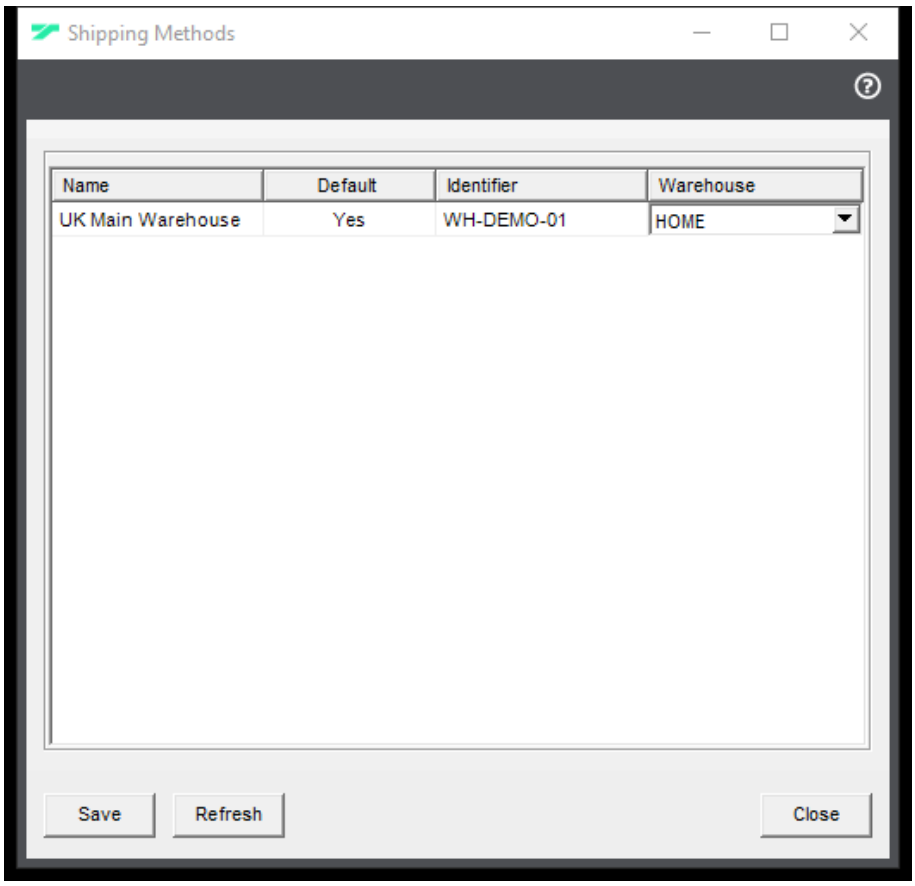
> **Important:** Refresh removes any courier mapping whose Temu value is no longer a Temu carrier name.



Temu – carriers

Warehouses

Warehouses opens the **Warehouses** window, showing each Temu warehouse (**Name**, **Default**, **Identifier**) and the Sage **Warehouse** it is linked to. Click **Refresh** to download Temu's warehouses ("Warehouses have been refreshed") – existing links are kept and warehouses Temu no longer has are removed. Choose a Sage warehouse for each Temu warehouse and click **Save**. The warehouse Temu marks as **Default** is used for despatches from a Sage warehouse that is not linked.



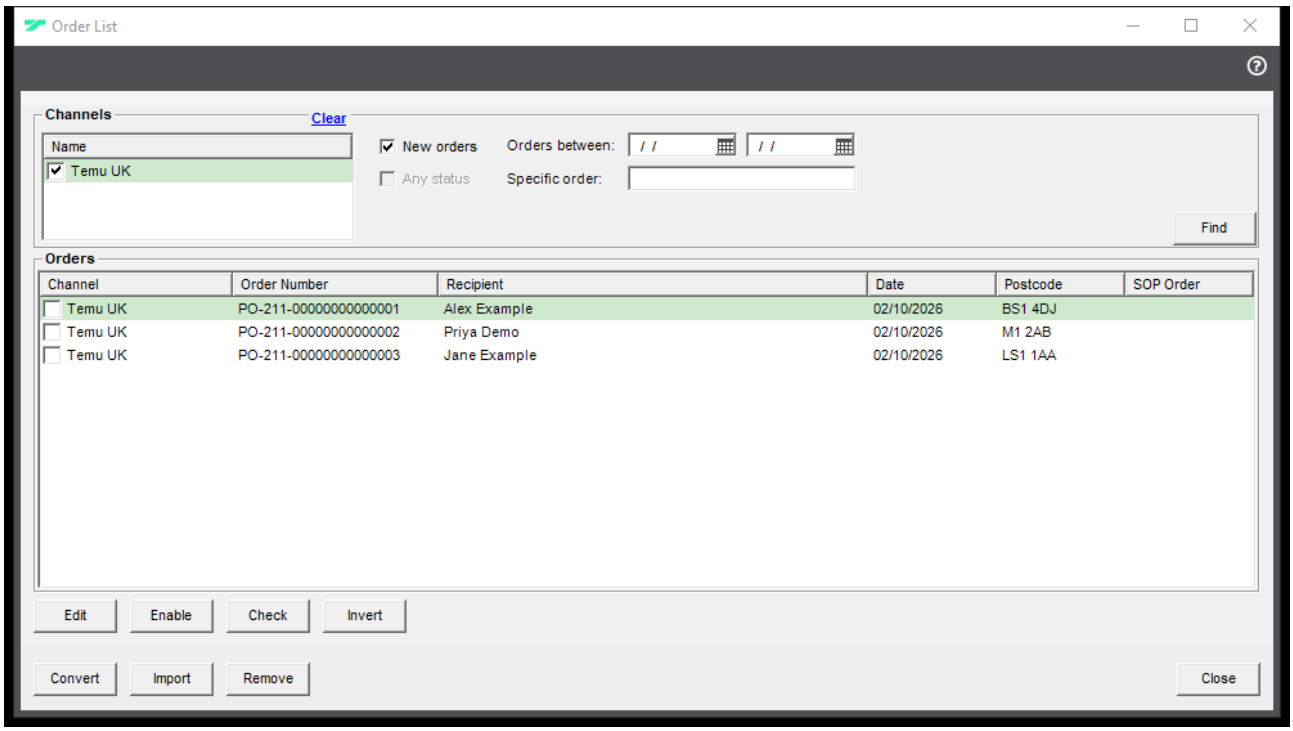
Temu – warehouses

11.3 Screens

Channels ▸ **Temu** has three entries: **Order List**, **Shipment List** and **Inventory List**. They are the shared lists (Operator Guide, sections 6.2, 13.3 and 11.6); what is particular to Temu is described here.

Order List

- **New orders** (ticked when the screen opens): **Find** downloads orders created since **Last Download:** that are awaiting shipment, then moves **Last Download:** on.
- Untick **New orders** to search **Orders between:** two dates. Orders awaiting shipment are downloaded, or orders of every status if you tick **Any status**.
- **Specific order:** downloads one Temu order by its order number.
- With nothing filled in you see “You need to provide a date or an order number”. Opening the screen does not contact Temu.



Temu – Order List

Inventory List

The grid shows **SKU**, **Name**, **Channel Code** (the Temu SKU ID) and **Free Stock**; **Refresh Inventory Items** downloads your Temu SKUs.

11.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads orders awaiting shipment, looking back 24 hours before **Last Download:** so that late-arriving orders are caught.
Process orders	Converts the stored orders; orders already in Sage are removed from the list.
Generate Tracking URLs	Fills in tracking links on despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds / Upload shipment feeds	Creates and sends despatch confirmations.
Download inventory items	The same as **Refresh Inventory Items**.
Create inventory Snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed / Create full inventory feed	Creates a stock export feed. Skipped while inventory feeds are paused (Operator Guide, section 11.2).
Upload inventory feed	Sends the stock levels to Temu.
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

11.5 Orders

- The Temu parent order number is the stored order's identifier and the **Customer Document No**. Each line also keeps Temu's order, goods and SKU references, which are needed when the despatch is confirmed.
- The item code is the **external SKU code** you gave the product in Temu – set it to the Sage item code (or an alias).

- Delivery details: recipient, address lines, town, county, postcode, mobile number and a Temu relay e-mail address.
- Orders for which Temu will not release delivery details (for example cancelled or unpaid orders) are skipped and logged as “Skipped order '<order>' - <reason>”.
- Default mappings: Customer Account Number **Temu** (fixed – create the customer), Customer Document No, delivery name and contact, address, city, county, post code, phone, e-mail, default warehouse, Item Code and Quantity. There is no price mapping because Temu does not send prices. Change them in **Field Mapping** (Operator Guide, section 5.3).

11.6 Inventory

- For each Temu SKU, Channels sets Temu's stock to your free stock (an absolute figure, not an adjustment).
- Before sending, Channels reads Temu's current stock and only sends the SKUs that differ.

11.7 Shipments

- Each despatch is confirmed with the Temu carrier, tracking number, the Temu warehouse and the despatched quantity of each line.
- The despatch's **Courier** must map to a Temu carrier name; otherwise the export feed fails with “Failed to locate Temu carrier identifier for '<courier>'”.
- The Sage warehouse on each despatched line must be linked to a Temu warehouse, or Temu must have a default warehouse; otherwise you see “Failed to locate Temu warehouse for line and no default warehouse setup”.

11.8 Points to note

- Only Temu's UK carrier list is used.
- There is no acknowledgement or cancellation step – manage cancellations in Temu Seller Center.

12. Mirakl

12.1 What it does

Mirakl is the platform behind many retailer marketplaces. Each Mirakl channel connects one of your seller shops on one marketplace; add a channel for each marketplace you sell on. Channels downloads orders that are ready to ship as stored orders, converts them into Sage sales orders, sends despatches with tracking, and uploads stock, price, promotional price and lead time for each of your offers.

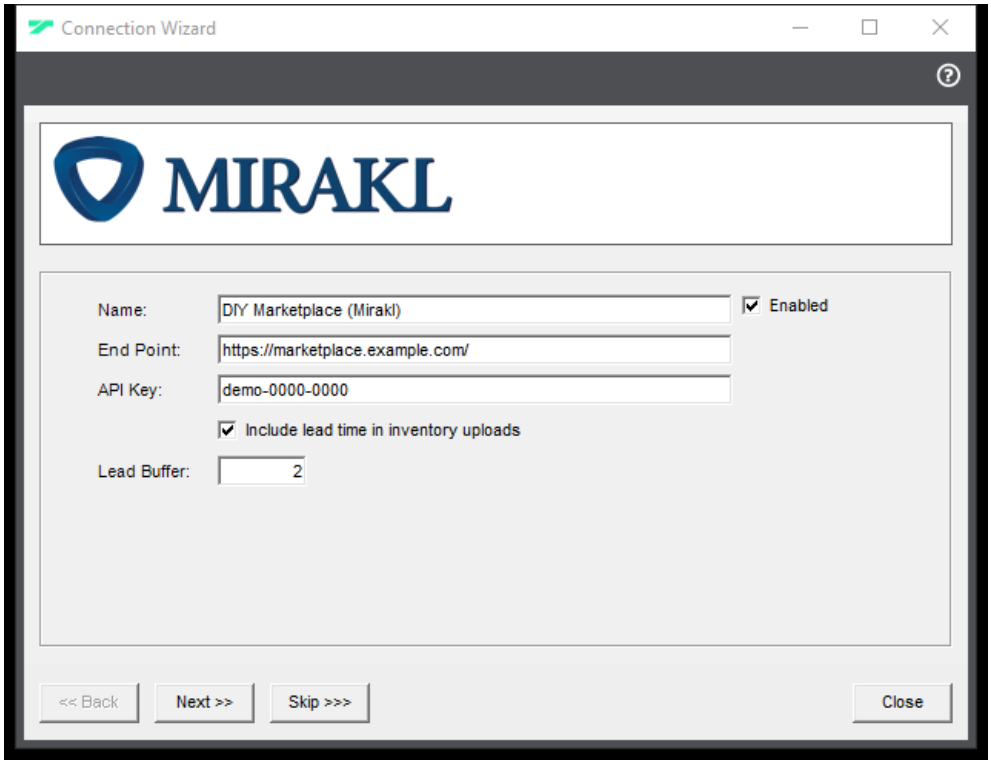
Accepting or refusing orders is done in the marketplace's Mirakl back office (or by the marketplace automatically). Channels only downloads orders once they are accepted and waiting to ship.

12.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Mirakl** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

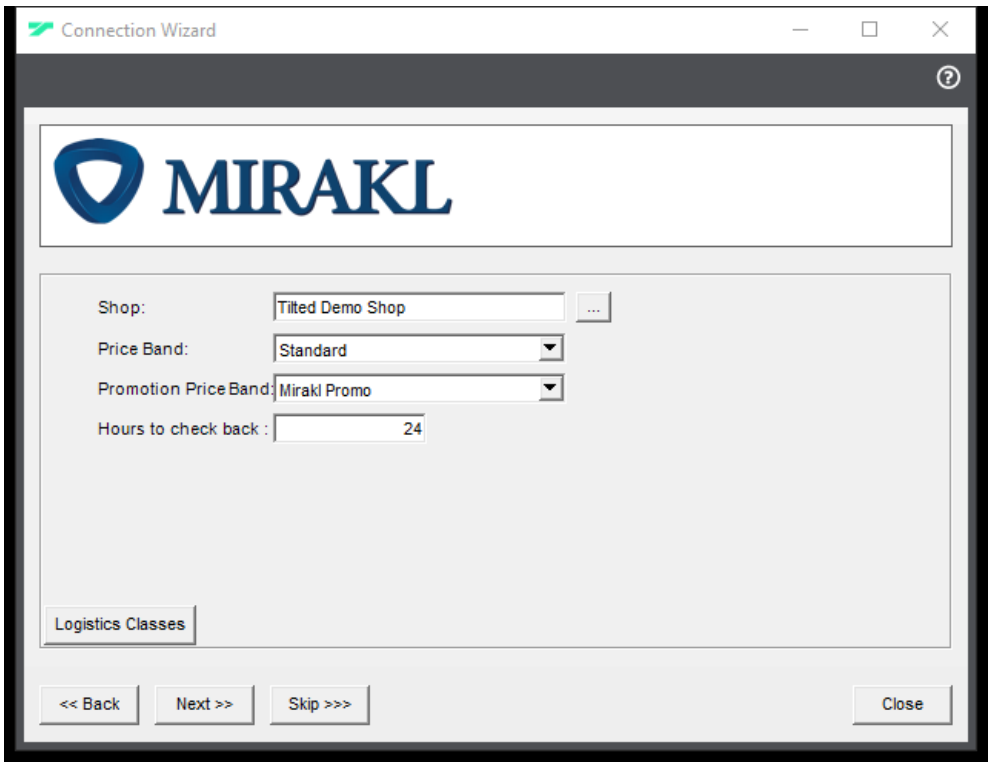
Field	What it does
Name:	The channel name, for example `Example Marketplace`. Required – "You need to provide a name".
Enabled	Switches the channel on.
End Point:	The address of the marketplace's Mirakl site, for example `https://marketplace.example.com/`. Required – "You need to provide an end point".
API Key:	Your shop's API key from the Mirakl seller back office. Required – "You need to provide a token".
Include lead time in inventory uploads	For items with no free stock but stock on order, upload the incoming quantity with a lead time (section 12.6).
Lead Buffer:	Days added to the lead time when lead times are uploaded.



Mirakl – connection page

Options page

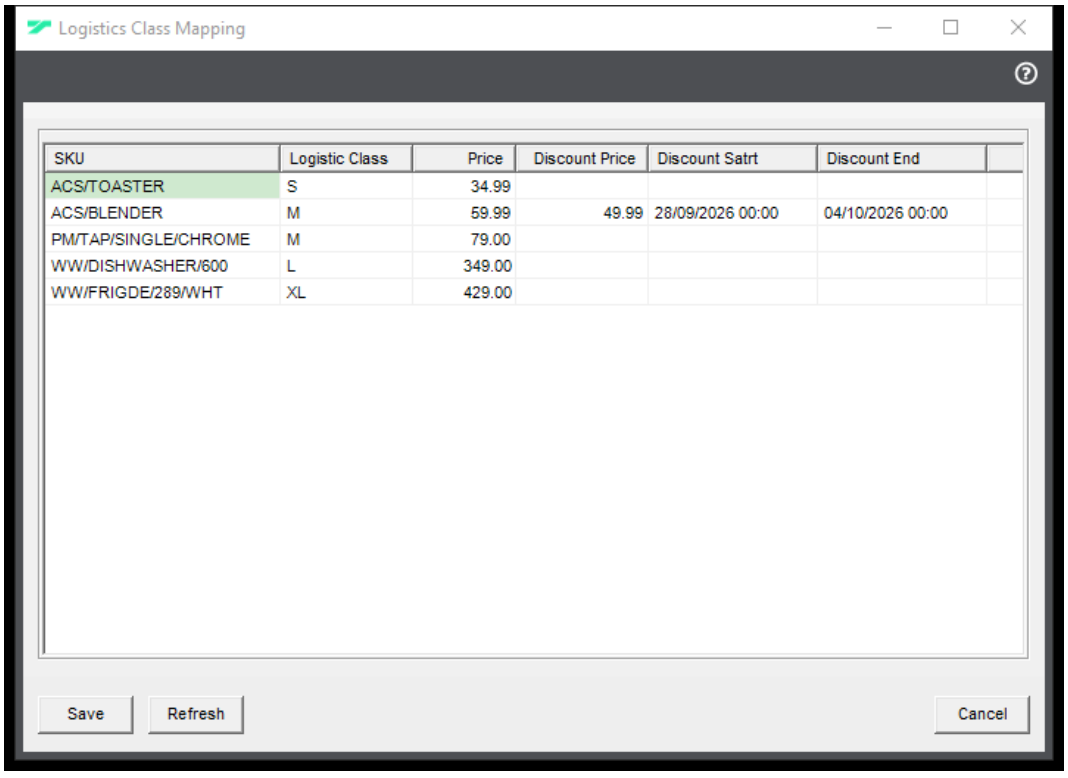
Field	What it does
Shop: and **...**	Click **...** to check the connection and fetch your shop name from Mirakl. Required – "You need to confirm the shop".
Price Band:	The Sage price band whose prices are sent as your offer prices. Mirakl prices include VAT, so use a VAT-inclusive band. Required – "You need to select a retail price band for inventory / price updates".
Promotion Price Band:	Optional. A Sage **Limited** price band whose prices and active dates are sent as offer discounts. It must differ from **Price Band:** ("You need to set the promotional price to be different to the standard") and must be limited ("The promotional price band should be a 'Limited' price band").
Hours to check back :	How far before the last download **New orders** looks again, so that late-accepted orders are not missed. Default 24.
Logistics Classes	Opens **Logistics Class Mapping** (below).



Mirakl – options page

Logistics Class Mapping

A read-only view of each offer as last downloaded from Mirakl: **SKU**, **Logistic Class**, **Price**, **Discount Price** and the discount start and end dates. Channels re-sends the logistic class with every stock upload, and uses these prices when Sage has no price for an item. **Refresh** downloads your current offers and replaces the list; **Save** keeps it and **Cancel** closes the window without saving.



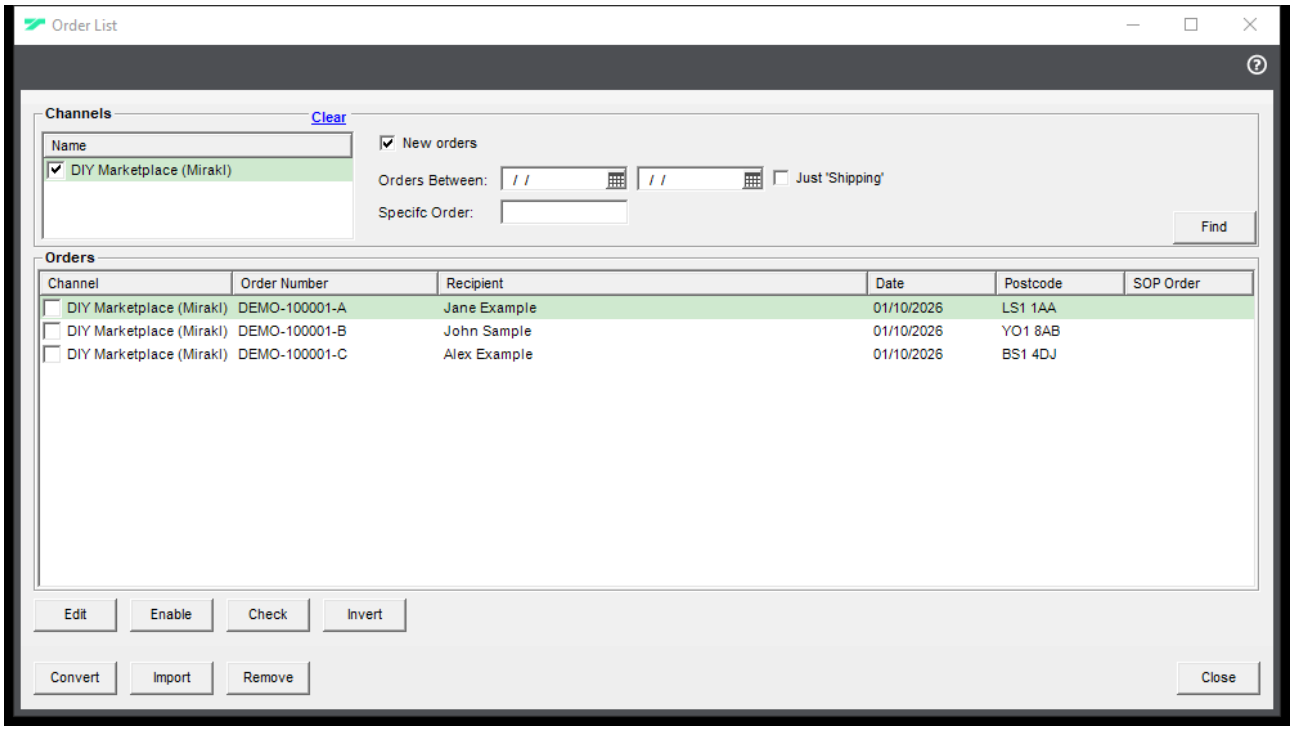
Mirakl – logistics class mapping

12.3 Screens

Channels ▸ Mirakl has three entries: **Order List**, **Shipment List** and **Inventory List**. They are the shared lists (Operator Guide, sections 6.2, 13.3 and 11.6); what is particular to Mirakl is described here.

Order List

- **New orders** (ticked when the screen opens): **Find** downloads orders that are ready to ship, created since the last download less **Hours to check back :**, and moves the last-download time on.
- Untick **New orders** to search **Orders Between:** two dates. Tick **Just 'Shipping'** to download only orders that are ready to ship.
- **Specific Order:** downloads one Mirakl order by its order number.
- With nothing filled in you see “You need to provide a 'from date' or an order number”. Opening the screen does not contact Mirakl.



Mirakl – Order List

Inventory List

Refresh Inventory Items downloads all your offers from Mirakl and also refreshes the logistic classes.

12.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	The same as **Find** with **New orders** ticked.
Process orders	Converts the stored orders; orders already in Sage are removed from the list.
Generate Tracking URLs	Fills in tracking links on despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds / Upload shipment feeds	Creates and sends shipment export feeds.
Download inventory items	The same as **Refresh Inventory Items**.
Create Inventory Snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed / Create full inventory feed	Creates an offer export feed. Skipped while inventory feeds are paused (Operator Guide, section 11.2).
Upload inventory feed	Sends the offer export feed to Mirakl.

Automation	What it does
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

12.5 Orders

- The Mirakl order number is the stored order's identifier and the **Customer Document No**; each line keeps Mirakl's order line number.
- Default mappings: Customer Account Number **MIR001** (fixed), Document Date (order created), Payment Value (order total), delivery name, address, city, county, post code, country and phone, Email Address (the customer notification address), Contact (billing name), **Tax Inclusive** Yes, Item Code (your offer SKU), Unit Price and Quantity. Change them in **Field Mapping** (Operator Guide, section 5.3).
- Mirakl sends three-letter country codes; GBR is treated as GB.
- Marketplace-specific order fields (for example a customer phone number or fulfilment centre code) are also available to map.

12.6 Inventory

- For each offer Channels sends your free stock (never below zero) and the price from **Price Band:**, rounded to two decimal places. No uplift is applied.
- If **Promotion Price Band:** is set and the item has a price in it, that price is sent as a discount for the band's active dates.
- With **Include lead time in inventory uploads** ticked, an item with no free stock but stock on order is offered at the quantity due, with a lead time of the days until it is due plus **Lead Buffer:**.
- Each export feed is one offer import, which Mirakl processes in the background.

12.7 Shipments

- Despatches are sent with the despatched lines and quantities, the tracking number and tracking link, and your Sage sales order number as the invoice reference. Each order line is sent once, so part despatches are supported.
- The carrier code sent is the despatch's **Courier**. It must match a carrier code set up on the marketplace – use courier mapping (Operator Guide, section 13.4).

12.8 Points to note

- Channels does not accept, refuse, cancel or refund Mirakl orders; do these in the Mirakl back office.
- **New orders** looks at when an order was created. If the marketplace accepts orders a long time after they are placed, increase **Hours to check back :** or run a dated **Find** with **Just 'Shipping'** ticked.
- Keep the prices in **Price Band:** VAT-inclusive – they are sent to the marketplace exactly as they are.

13. Marketplacer

13.1 What it does

Marketplacer is the platform behind a number of online marketplaces. The Marketplacer channel connects your seller account on one Marketplacer marketplace: it downloads your **invoices** (Marketplacer's name for

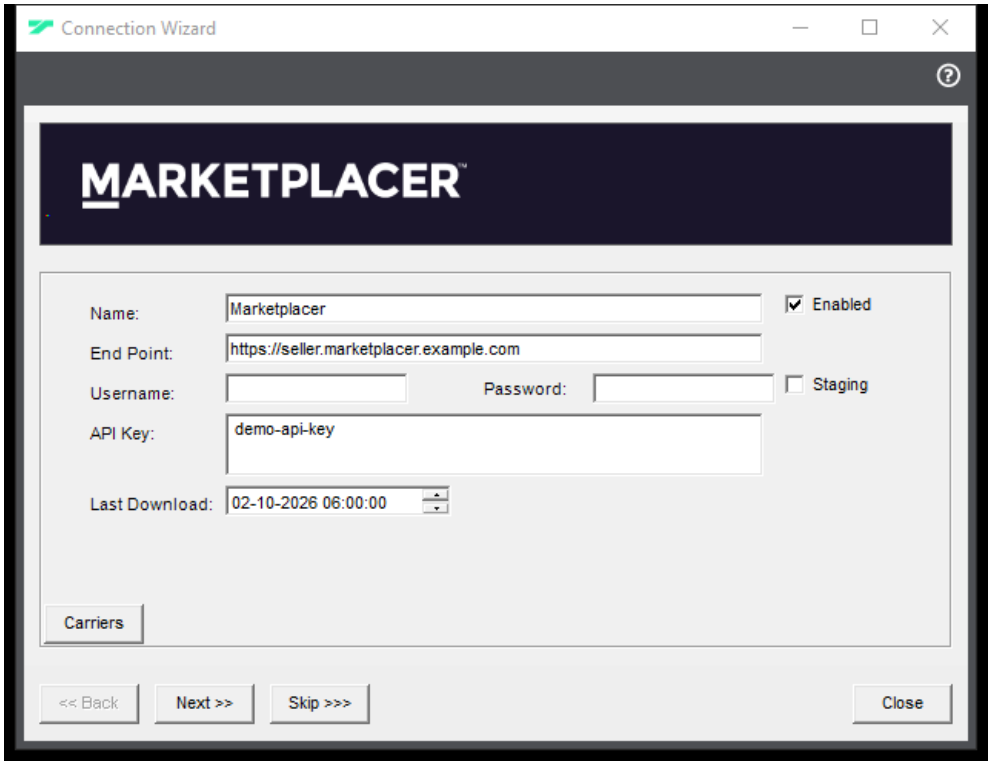
a seller's order) as stored orders so that you can convert them into Sage sales orders, sends shipments with tracking back to Marketplacer, and sets the stock on hand for each of your product variants.

13.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Marketplacer** (Operator Guide, section 4.2). The wizard has one **Connection** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The channel name. Required – "You need to provide a name".
Enabled	Switches the channel on.
End Point:	The marketplace's Marketplacer address, for example `https://marketplace.example.com`. Required – "You need to provide an end point".
Staging	Tick only when connecting to Marketplacer's test (staging) site.
Username: / **Password:**	The staging site's login. Only needed when **Staging** is ticked ("You need to provide a username", "You need to provide a password").
API Key:	Your seller API key from Marketplacer. Required – "You need to provide an API Key".
Last Download:	Invoices created after this date and time are downloaded by **New orders**. Defaults to midnight today.
Carriers	Opens the list of the marketplace's carriers (below).

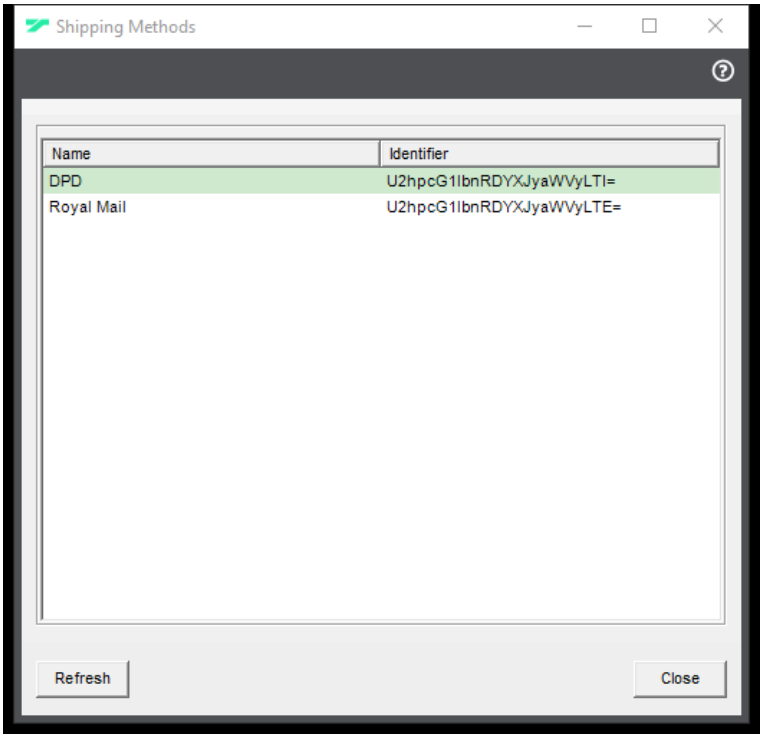


Marketplacer – connection page

Carriers

Carriers opens the **Shipping Methods** window, which lists the carriers set up on the marketplace (**Name**, **Identifier**). Click **Refresh** to download them ("Carriers have been refreshed"). Refresh also adds an empty courier mapping for each new carrier name; map your Sage couriers to these names (Operator Guide, sections 5.5 and 13.4).

Important: Refresh removes any courier mapping whose Marketplacer value is no longer one of the marketplace's carrier names.



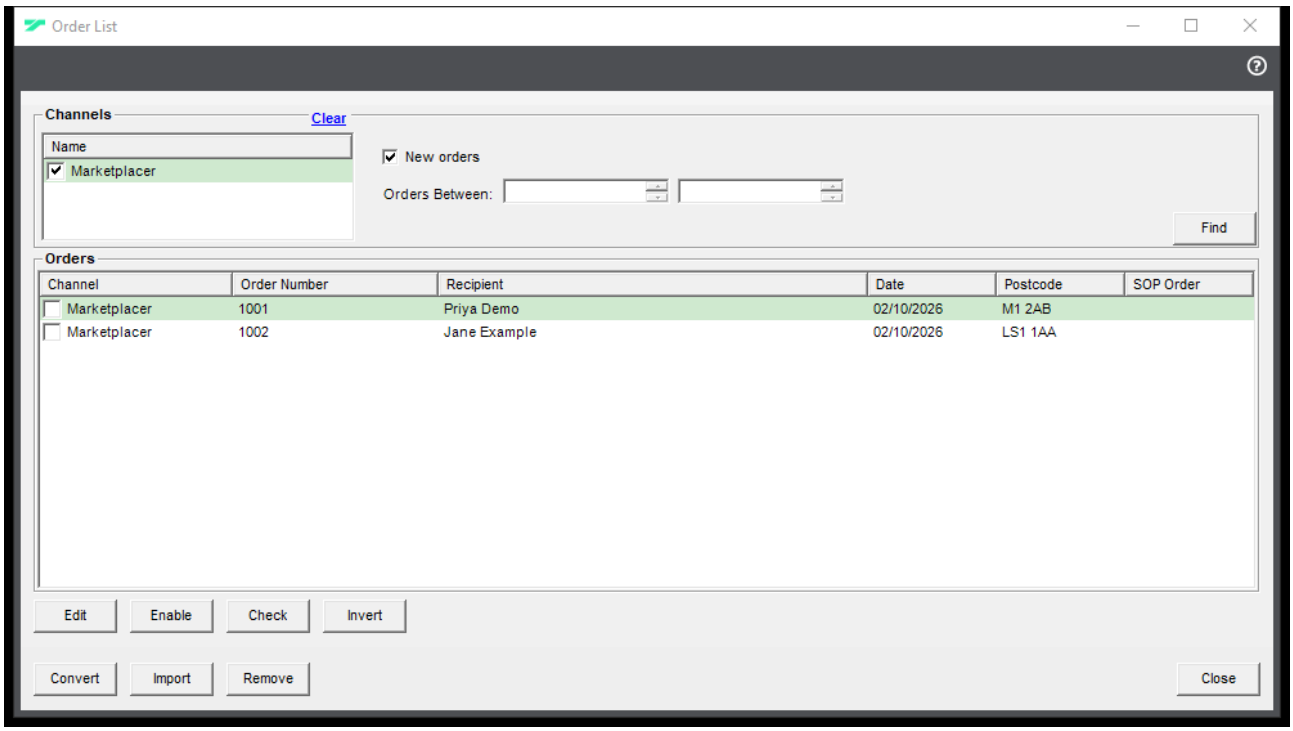
Marketplacer – carriers

13.3 Screens

Channels ▸ Marketplacer has three entries: **Order List**, **Shipment List** and **Inventory List**. They are the shared lists (Operator Guide, sections 6.2, 13.3 and 11.6); what is particular to Marketplacer is described here.

Order List

- **New orders** (ticked when the screen opens): **Find** downloads invoices created since **Last Download:** and moves it on.
- Untick **New orders** to search **Orders Between:** two dates and times (“You need to provide a 'from date'”, “You need to provide an 'end date'”).
- **Order Number** is the Marketplacer invoice number. Opening the screen does not contact Marketplacer.



Marketplacer – Order List

Inventory List

Marketplacer always uses the current style of inventory list; **Refresh Inventory Items** downloads every variant from Marketplacer.

13.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	The same as **Find** with **New orders** ticked.
Process orders	Converts the stored invoices; those already in Sage are removed from the list.
Generate Tracking URLs	Fills in tracking links on despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds / Upload shipment feeds	Creates and sends shipments.
Download inventory items	The same as **Refresh Inventory Items**.
Create inventory Snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed / Create full inventory feed	Creates a stock export feed. Skipped while inventory feeds are paused (Operator Guide, section 11.2).
Upload inventory feed	Sends the stock levels to Marketplacer.

13.5 Orders

- Default mappings: Customer Account Number **MPLACER** (fixed), Customer Document No (invoice number), Payment Value (order subtotal), delivery name and contact, Delivery Address 1 (the address line), city, post code, country, e-mail address, default warehouse, Item Code (variant SKU), Quantity and Unit Price. Change them in **Field Mapping** (Operator Guide, section 5.3).
- Retail tax rules apply to Marketplacer orders (Operator Guide, sections 3.9 and 5.1).
- Invoices are downloaded whatever their status. Check for cancelled or refunded invoices in Marketplacer before converting.

13.6 Inventory

- Channels sets each variant's count on hand to your free stock (never below zero).
- Marketplacer's current figures are read first and only variants that differ are sent.

13.7 Shipments

- Each despatch creates a shipment on the invoice with the carrier, the despatch date, the tracking number and the quantity shipped of each line.
- The despatch's **Courier** must match a carrier name in the **Carriers** list; otherwise the export feed fails with “Failed to locate Marketplacer carrier using '<courier>'”.

> **Important:** Re-sending a shipment export feed creates the shipments again. If an export feed partly succeeded, check the invoices in Marketplacer before submitting it again.

13.8 Points to note

- There is no acknowledgement, cancellation or refund handling – manage these in Marketplacer.

14. ManoMano

14.1 What it does

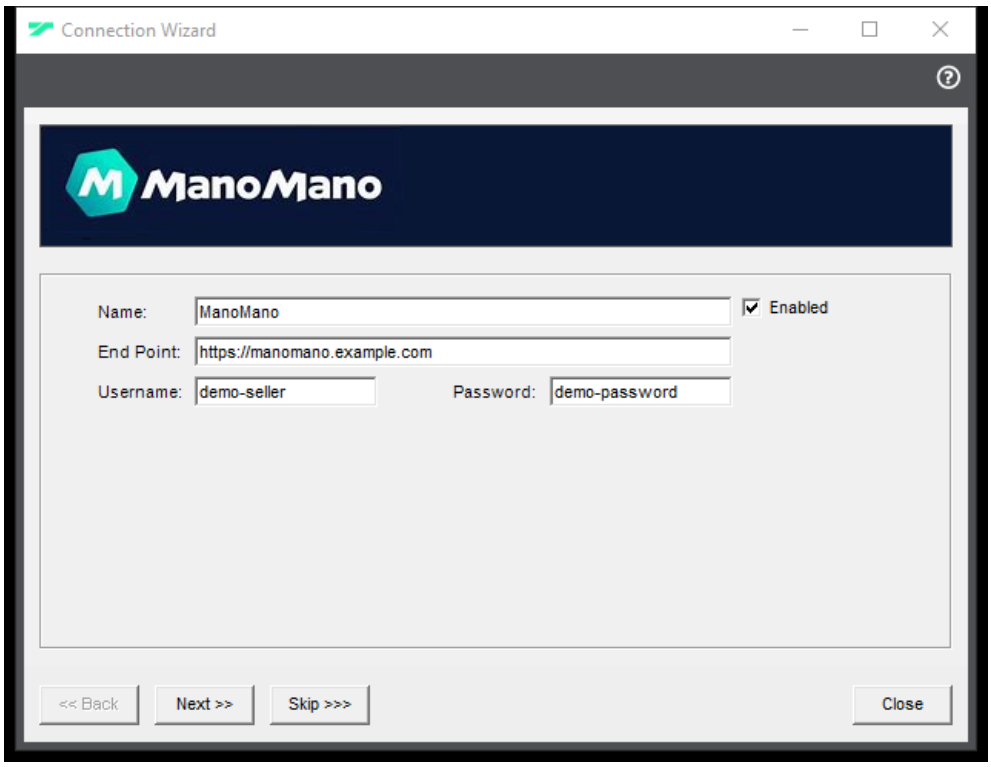
The ManoMano channel connects your seller account on ManoMano, the DIY and garden marketplace. Channels downloads ManoMano's pending orders as stored orders; once you have converted them into Sage sales orders, Channels **accepts** them on ManoMano, and when you despatch it sends the tracking details. Stock and prices are not sent to ManoMano.

14.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Mano Mano** (Operator Guide, section 4.2). The wizard has one **Connection** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The channel name. Required – “You need to provide a name”.
Enabled	Switches the channel on.
End Point:	ManoMano's partner web-service address. Filled in for you; leave it unless told otherwise. Required – “You need to provide an end point”.
Username:	Your ManoMano partner login. Required – “You need to provide a username”.
Password:	Your ManoMano partner password. Required – “You need to provide a password”. If you change the password at ManoMano, change it here too.



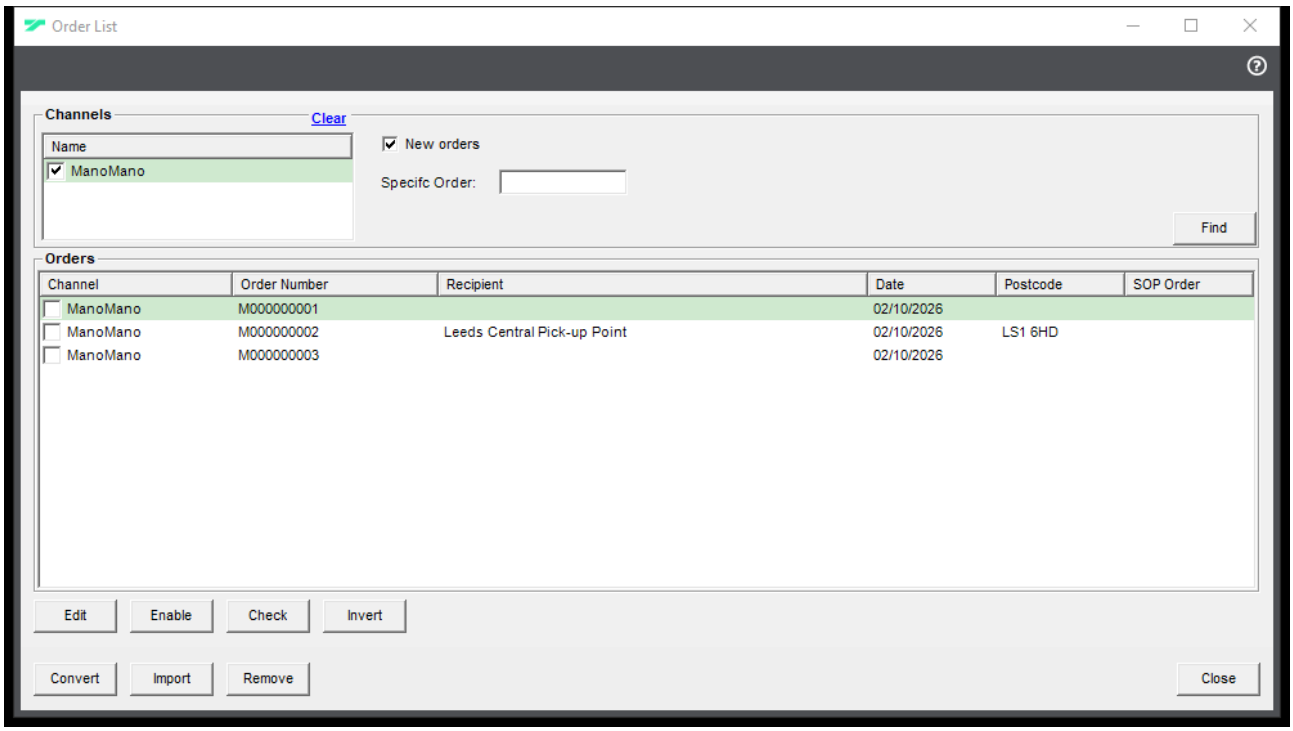
ManoMano – connection page

14.3 Screens

Channels ▸ **ManoMano** has three entries: **Order List**, **Converted Order List** and **Shipment List**. They are the shared lists (Operator Guide, sections 6.2, 6.11 and 13.3); what is particular to ManoMano is described here.

Order List

- **New orders** (ticked when the screen opens): **Find** downloads every order ManoMano lists as pending.
- **Specific Order:** downloads one order by its ManoMano order reference.
- Opening the screen does not contact ManoMano.



ManoMano – Order List

Converted Order List

Create Feed creates an acceptance export feed for the ticked orders; when the export feed is sent, the orders are accepted on ManoMano.

Shipment List

Create Feed creates a shipment export feed for the ticked despatches.

14.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads ManoMano's pending orders.
Process orders	Converts the stored orders; orders already in Sage are removed from the list.
Generate Tracking URLs	Fills in tracking links on despatches not yet sent (Operator Guide, section 13.4).
Create Acknowledgement feeds / Upload Acknowledgement feeds	Creates acceptance export feeds for newly converted orders and accepts them on ManoMano.
Create shipment feeds / Upload shipment feeds	Creates and sends shipment details.
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

A typical job bag runs **Download new orders**, **Process orders**, **Create Acknowledgement feeds** and **Upload Acknowledgement feeds**, so that orders are accepted as soon as they are in Sage.

14.5 Orders

- The ManoMano order reference is the stored order's identifier and the **Customer Document No**.
- Default mappings: Customer Account Number **MAN001** (fixed), Document Date (order time), Payment Value (order total), delivery name, address lines, city, post code, country and phone, Email

Address, Contact (billing name), **Tax Inclusive** Yes, Item Code (SKU), Unit Price and Quantity. Change them in **Field Mapping** (Operator Guide, section 5.3).

- Pick-up point (relay) details, regions, VAT rates and voucher totals are also available to map.
- Orders are accepted on ManoMano only after they exist in Sage. Refusing orders is done on ManoMano.

14.6 Shipments

- For each despatch, Channels sends the order reference, tracking number and tracking link. Any order that ManoMano rejects is listed in the export feed's errors (Operator Guide, section 14.4).

14.7 Points to note

- ManoMano expects orders to be accepted promptly – schedule the acknowledgement automations with the order download.
- Stock levels and prices must be maintained on ManoMano directly.

15. Wowcher

15.1 What it does

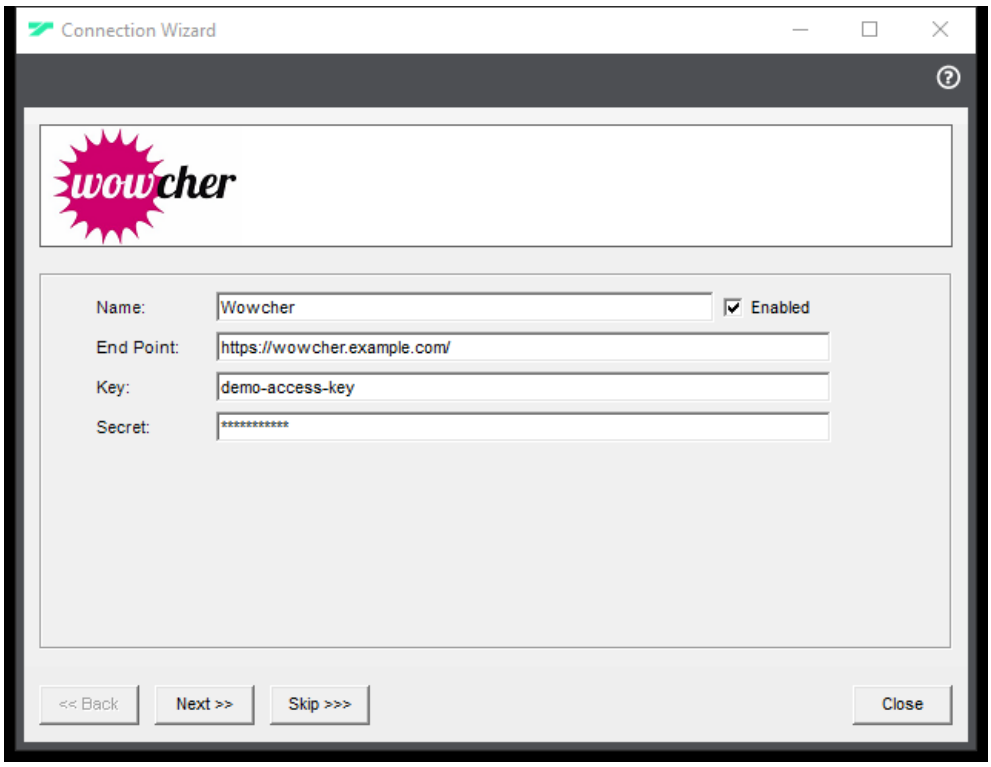
The Wowcher channel handles product deals sold on Wowcher. Each redeemed voucher arrives as an order for one item. Channels downloads the orders as stored orders so that you can convert them into Sage sales orders, tells Wowcher that each order has been taken, and later tells Wowcher it has been despatched, with the courier and tracking number.

15.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Wowcher** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The channel name. Required – “You need to provide a name”.
Enabled	Switches the channel on.
End Point:	The Wowcher API address Wowcher gives you. Required – “You need to provide an end point”.
Key:	Your Wowcher API key. Required – “You need to provide a key”.
Secret:	Your Wowcher API secret. Required – “You need to provide a secret”.

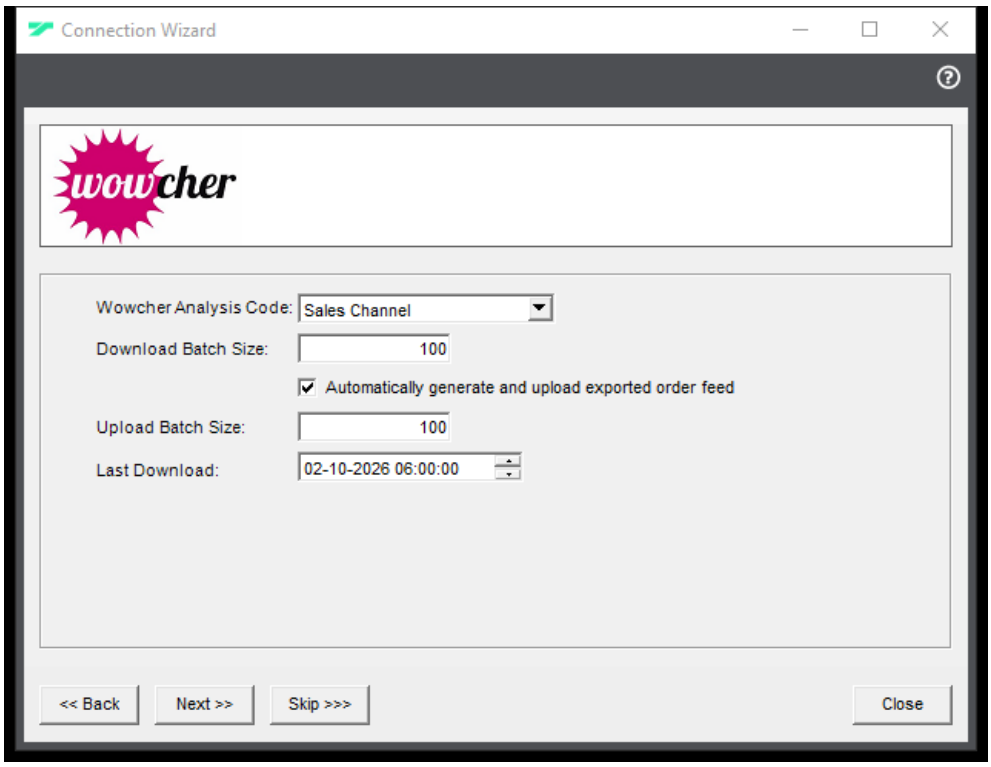


Wowcher – connection page

Options page

Field	What it does
Wowcher Analysis Code:	The analysis code for the Wowcher permalink. Required – "You need to select a permalink analysis code".
Automatically generate and upload exported order feed	When ticked, the automations tell Wowcher straight away that newly converted orders have been taken. When clear, use **Create Feed** on the **Converted Order List**.
Download Batch Size:	Orders per page when downloading. Between 1 and 1000; default 100.
Upload Batch Size:	Orders per status update sent to Wowcher. Between 1 and 1000; default 100.
Last Download:	Orders after this date and time are downloaded by **New orders**.

A batch size outside the range shows "Feed batch size must be a number between 1 and 1000".



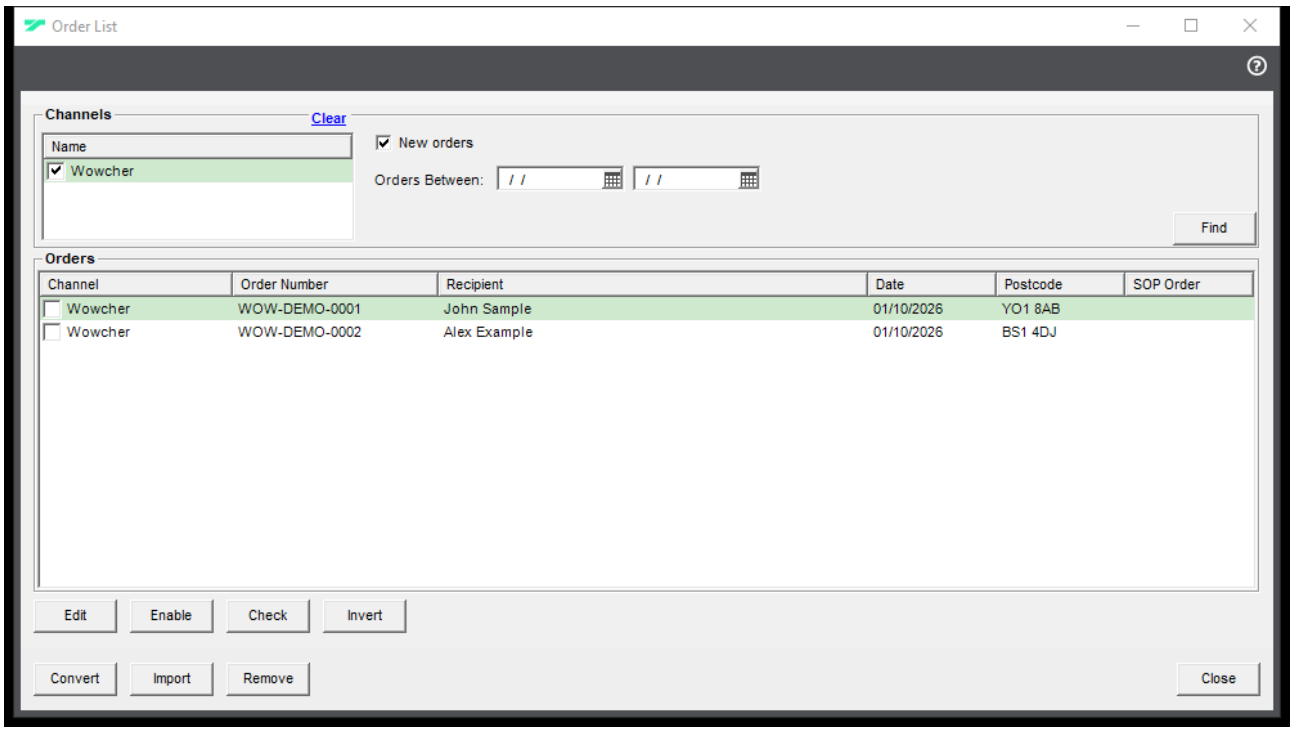
Wowcher – options page

15.3 Screens

Channels ▸ **Wowcher** has three entries: **Order List**, **Converted Order List** and **Shipment List**. They are the shared lists (Operator Guide, sections 6.2, 6.11 and 13.3); what is particular to Wowcher is described here.

Order List

- **New orders** (ticked when the screen opens): **Find** downloads open orders since **Last Download:** and moves it on.
- Untick **New orders** and enter **Orders Between:** dates to download every order in that period, whatever its state. If you leave the second date empty, today is used.
- **Order Number** is the Wowcher voucher code. Opening the screen does not contact Wowcher.



Wowcher – Order List

Converted Order List and Shipment List

On the **Converted Order List**, **Create Feed** creates the "order taken" update for the ticked orders; on the **Shipment List** it creates the despatch update.

15.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	The same as **Find** with **New orders** ticked.
Process orders	Converts the stored orders. When **Automatically generate and upload exported order feed** is ticked, Wowcher is told straight away that they have been taken.
Create acknowledgement feeds / Upload acknowledgement feeds	Creates and sends "order taken" updates for converted orders (when the option above is ticked).
Generate Tracking URLs	Fills in tracking links on despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds / Upload shipment feeds	Creates and sends despatch updates.
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

15.5 Orders

- The voucher code is the stored order's identifier, order number and **Customer Document No**.
- Each order has one line for the deal's product, quantity 1. Wowcher does not send a price, so the line is priced from Sage – set up the price for the **WOWCHER** customer (for example with a price band).
- Default mappings: Customer Account Number **WOWCHER** (fixed), delivery name and contact, address lines, city, county, post code, country, phone and e-mail, **Tax Inclusive** No, Item Code (product SKU), Description (product name) and Quantity 1. Change them in **Field Mapping** (Operator Guide, section 5.3).
- Retail tax rules apply to Wowcher orders (Operator Guide, sections 3.9 and 5.1).

15.6 Shipments

- Each despatch is sent to Wowcher as “despatched” with the tracking number and the despatch's **Courier** as the shipping vendor.

15.7 Points to note

- If you think an order has been missed, download that day again with **Orders Between:** – orders already downloaded are not stored twice.

16. Groupon

16.1 What it does

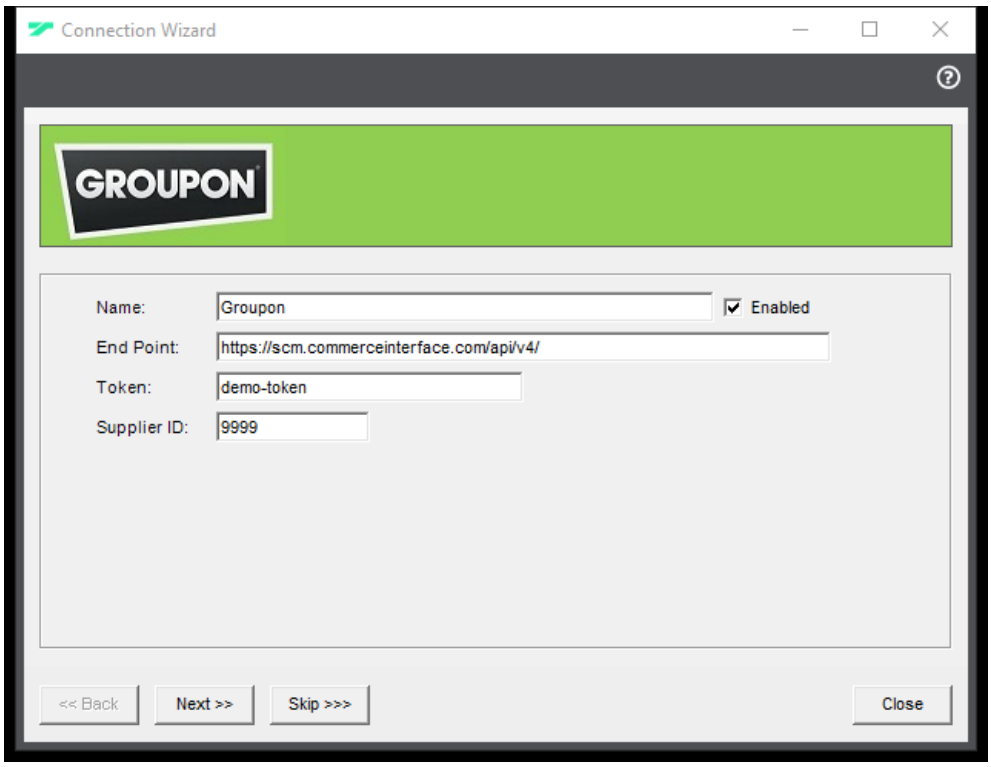
The Groupon channel handles Groupon Goods orders through Groupon's supplier order system. Channels downloads new orders as stored orders so that you can convert them into Sage sales orders, marks them as taken (exported) at Groupon, sends tracking for each line when you despatch, and invoices the orders Groupon tells you are ready for invoicing – grouped by deal – with optional invoice PDFs.

16.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Groupon** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

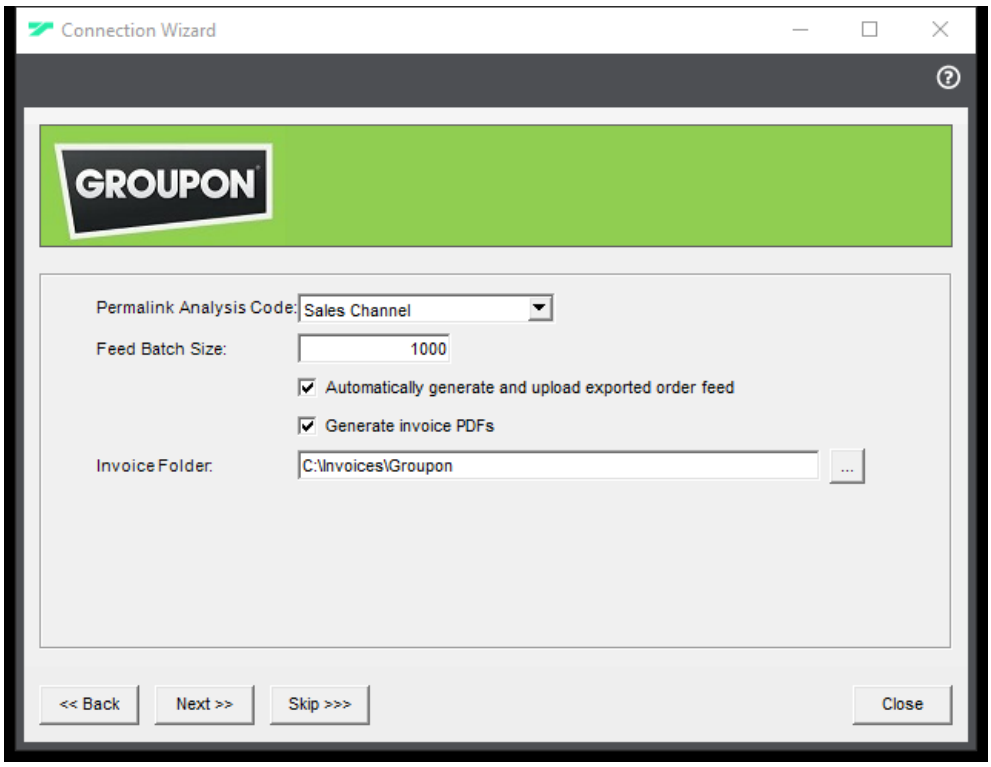
Field	What it does
Name:	The channel name. Required – “You need to provide a name”.
Enabled	Switches the channel on.
End Point:	Groupon's supplier API address. Filled in for you. Required – “You need to provide an end point”.
Token:	Your supplier token from Groupon. Required – “You need to provide a token”.
Supplier ID:	Your Groupon supplier ID. Required – “You need to provide a supplier identifier”.



Groupon – connection page

Options page

Field	What it does
Permalink Analysis Code:	The Sage sales analysis code that receives each order's Groupon deal permalink, on the order and its lines. Required – "You need to select a permalink analysis code".
Automatically generate and upload exported order feed	When ticked, the automations mark newly converted orders as exported at Groupon straight away.
Feed Batch Size:	Orders or despatches per export feed. Between 1 and 1000; default 1000 ("Feed batch size must be a number between 1 and 1000").
Generate invoice PDFs	Also save a PDF of the invoices created from the **Ready to Invoice List**.
Invoice Folder: and **...**	The folder for those PDFs. Required when PDFs are ticked – "You need to select an invoice folder".



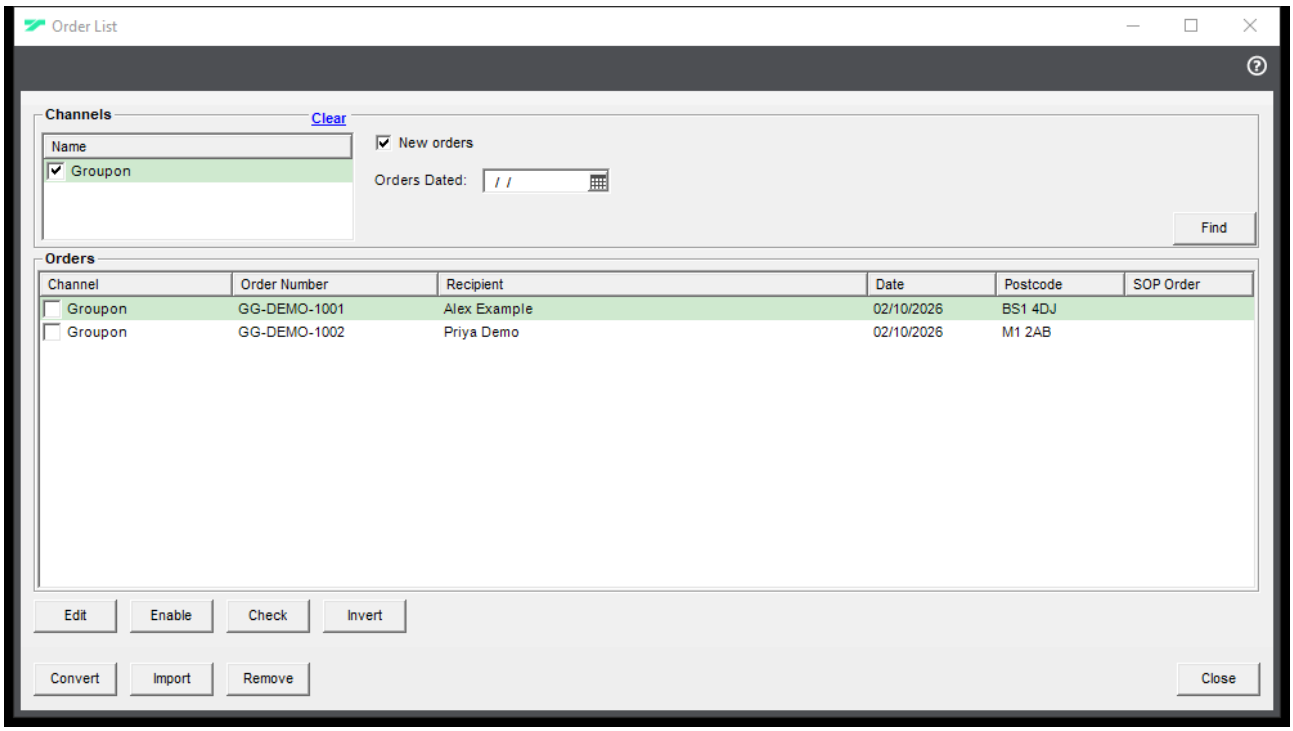
Groupon – options page

16.3 Screens

Channels ▸ **Groupon** has four entries: **Order List**, **Converted Order List**, **Shipment List** and **Ready to Invoice List**. The first three are the shared lists (Operator Guide, sections 6.2, 6.11 and 13.3); what is particular to Groupon is described here.

Order List

- **New orders** (ticked when the screen opens): **Find** downloads the orders not yet marked as exported at Groupon.
- Untick **New orders** and choose a date in **Orders Dated:** to download that day's orders again.
- Cancelled orders are not downloaded. Opening the screen does not contact Groupon.



Groupon – Order List

Converted Order List and Shipment List

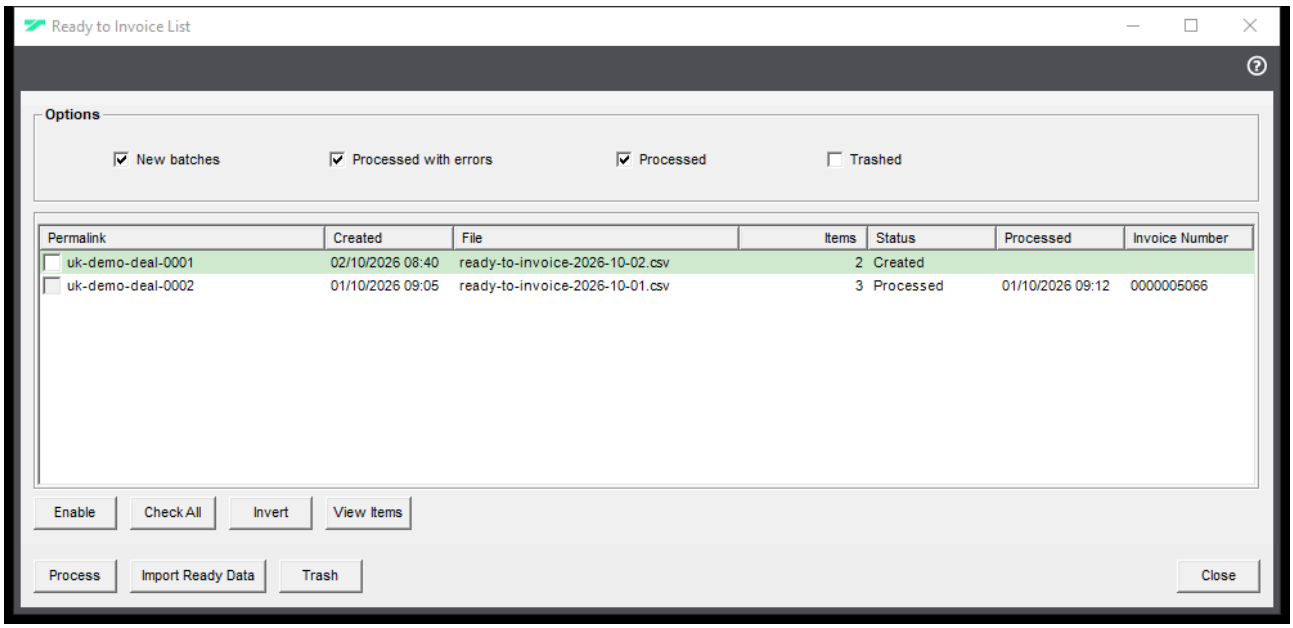
On the **Converted Order List**, **Create Feed** creates an "exported" update for the ticked orders; on the **Shipment List** it creates the tracking update.

Ready to Invoice List

Groupon periodically tells you which orders it is ready to be invoiced for, as a spreadsheet (CSV) file. This screen turns that file into **batches** – one per deal permalink – and invoices each batch in Sage. **New batches**, **Processed**, **Processed with errors** and **Trashed** choose which batches are shown; **New batches** and **Processed with errors** are ticked when the screen opens.

Button	What it does
Import Ready Data	Choose one or more Groupon ready-to-invoice files. A batch is created for each deal permalink in the file, with one item per order.
Process	Invoices the ticked batches (see below).
Trash	Sets the ticked batches aside ("Are you sure you want to trash the selected batches?").
View Items	Shows the orders in the highlighted batch.
Enable, **Check All**, **Invert**	Ticking aids. Only new batches can be ticked; **Enable** allows the highlighted batch to be ticked again.
Close	Closes the screen.

The grid shows **Permalink**, **Created**, **File**, **Items**, **Status**, **Processed** and **Invoice Number**.



Groupon – Ready to Invoice List

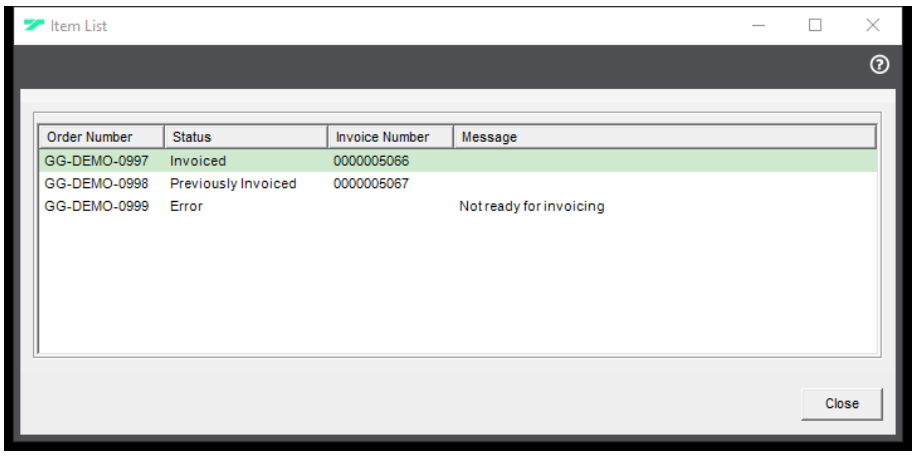
When you click **Process**, each order in the batch is checked:

- an order already invoiced in Sage is marked **Previously Invoiced**;
- an order that cannot yet be invoiced (for example not fully despatched) is marked **Error** with "Not ready for invoicing";
- the remaining orders are invoiced by Sage's own invoice printing, dated today. If the Groupon customer is set to consolidated invoicing, they appear on one invoice. Each item is marked **Invoiced** with its invoice number.

Channels then reports "<n> orders have been invoiced". With **Generate invoice PDFs** ticked, the invoices are saved in **Invoice Folder:**, in a sub-folder named after the permalink.

> **Important:** **Process** creates real Sage invoices straight away. Check the batch with **View Items** first.

View Items opens the **Item List** – **Order Number**, **Status**, **Invoice Number** and **Message** for each order in the batch.



Groupon – batch items

16.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads orders not yet exported.
Process orders	Converts the stored orders and writes the deal permalink to the analysis code. When **Automatically generate and upload exported order feed** is ticked, the orders are marked exported at Groupon straight away.
Generate Tracking URLs	Fills in tracking links on despatches not yet sent (Operator Guide, section 13.4).
Create acknowledgement feeds / Upload acknowledgement feeds	Creates and sends "exported" updates for converted orders (when the option above is ticked).
Create shipment feeds / Upload shipment feeds	Creates and sends tracking updates.
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

16.5 Orders

- The Groupon order ID is the stored order's identifier and the **Customer Document No**. The order date is the day the order was downloaded.
- Each line keeps Groupon's line item ID, the deal permalink, SKU, quantity, unit price and ship-by date.
- Default mappings: Customer Account Number **GROUPON** (fixed), delivery name, address lines, city, county, post code and phone, default warehouse, Item Code (SKU), Unit Price and Quantity. Change them in **Field Mapping** (Operator Guide, section 5.3).

16.6 Shipments and invoices

- Tracking is sent per line: the line item, quantity despatched, carrier (the despatch's **Courier**) and tracking number. Part despatches are supported; each line is sent once.
- Invoices are raised from the **Ready to Invoice List** (section 16.3), once Groupon has confirmed the orders are ready to be invoiced.

16.7 Points to note

- Invoices are only raised from the **Ready to Invoice List** – Groupon orders are not invoiced automatically by Channels.
- Make sure the Groupon file's orders have been despatched in Sage before you process a batch.

17. Kornit

17.1 What it does

The Kornit channel connects Kornit X (formerly Custom Gateway), the print-on-demand platform. Kornit X **sends** its orders to your Channels Web API, so there is nothing to download – the orders simply appear as stored orders on the **Order List**. You convert them into Sage sales orders, and Channels sends status updates back to Kornit X: acknowledged, despatched (with the tracking number), and the stock available for each SKU.

Before you start

- The Channels Web API must be installed and reachable by Kornit X (Operator Guide, section 8.7).
- Kornit X is set up to post its orders to your Web API at an address ending `/channels/<channel name>/kornitXOrder`, where <channel name> is this channel's **Name:**. Choose a short name without spaces, for example `KORNIT-UK`.

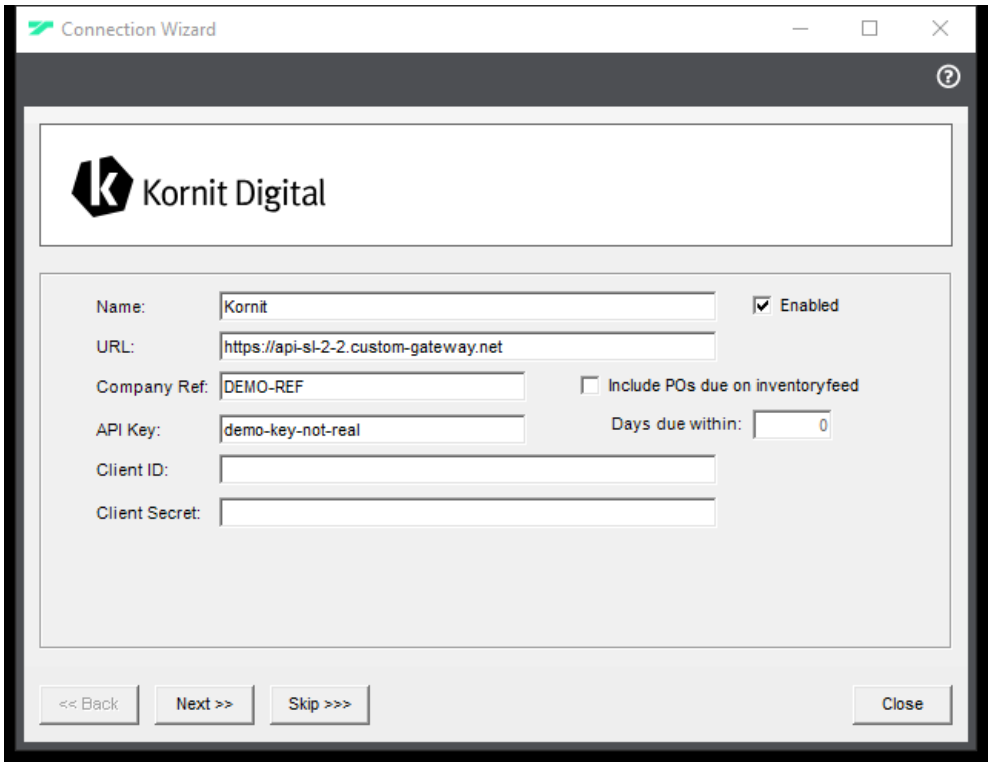
- You need your Kornit X company reference and API key.

17.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Kornit** (Operator Guide, section 4.2). The wizard has one **Connection** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The channel name – also part of the address Kornit X posts orders to. Required – "You need to provide a name".
Enabled	Switches the channel on. Orders posted to a disabled channel are refused.
URL:	The Kornit X API address. Filled in for you. Required – "You need to provide a url".
Company Ref:	Your Kornit X company reference. Required – "You need to provide a company reference".
API Key:	Your Kornit X API key. Required – "You need to provide an API Key".



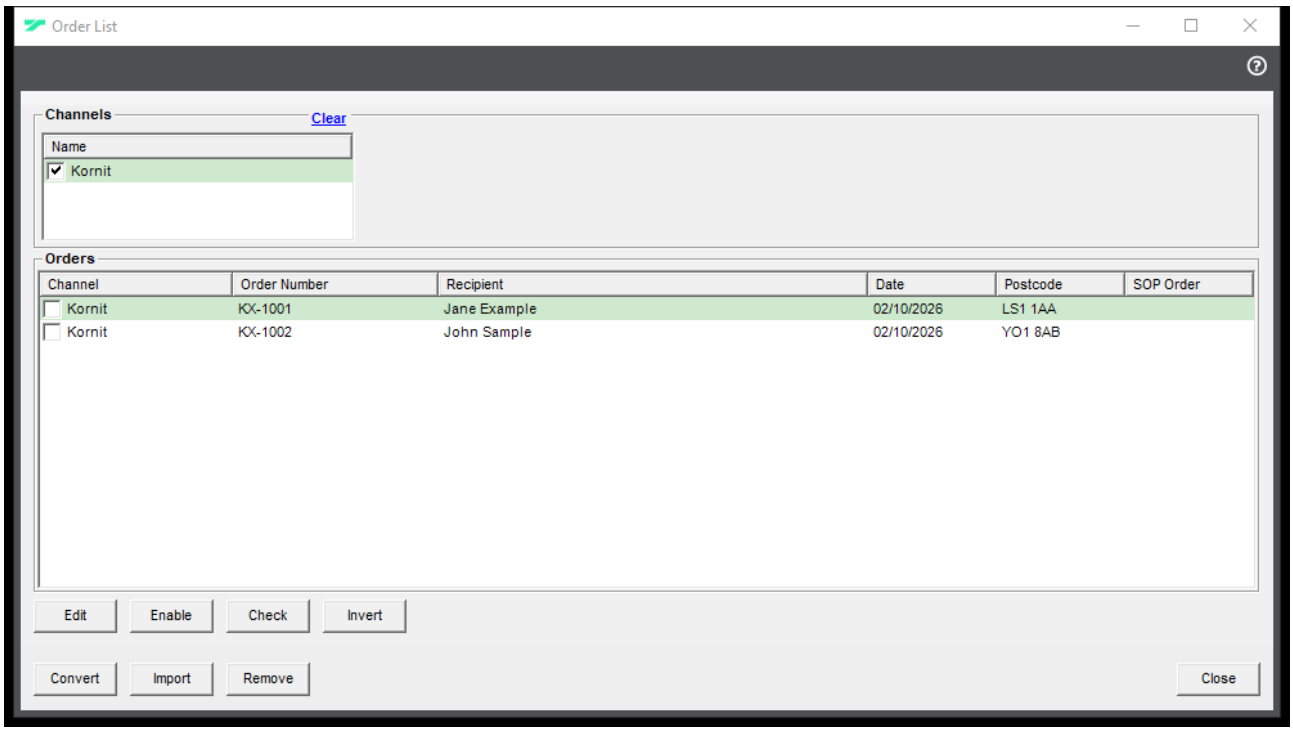
Kornit – connection page

17.3 Screens

Channels ▸ **Kornit** has four entries: **Order List**, **Converted Order List**, **Shipment List** and **Inventory List**. They are the shared lists (Operator Guide, sections 6.2, 6.11, 13.3 and 11.6); what is particular to Kornit is described here.

Order List

The **Order List** has no **Find** button: it shows the stored orders Kornit X has sent that are waiting to be converted. Convert, edit and remove them as usual.



Kornit – Order List

Converted Order List, Shipment List and Inventory List

On the **Converted Order List**, **Create Feed** creates the "acknowledged" update for the ticked orders. On the **Inventory List**, **Refresh Inventory Items** builds the list of SKUs from your stock aliases for this channel (Operator Guide, section 9.1) – it does not contact Kornit X.

17.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Process orders	Converts the stored orders Kornit X has sent; orders already in Sage are removed from the list.
Create acknowledgement feeds / Upload acknowledgement feeds	Tells Kornit X that converted orders have been acknowledged.
Create shipment feeds / Upload shipment feeds	Tells Kornit X that orders are despatched, with the tracking number.
Create inventory Snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Refresh inventory items	The same as **Refresh Inventory Items**.
Create delta inventory feed / Create full inventory feed	Creates a stock export feed. Skipped while inventory feeds are paused (Operator Guide, section 11.2).
Upload inventory feed	Sends stock availability to Kornit X.
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

17.5 Orders

- The Kornit X order ID is the stored order's identifier; the external reference becomes the **Customer Document No**; the required dispatch date becomes the requested delivery date.
- The item code is Kornit X's **mapped SKU** for the line; the unit price is the sale price excluding VAT.
- Default mappings: Customer Account Number **KOR001** (fixed), Customer Document No, delivery name, address lines 1–4, post code, country code, phone, e-mail, requested delivery date, shipping

method, **Tax Inclusive** No, default warehouse, Item Code, Quantity and Unit Price. Change them in **Field Mapping** (Operator Guide, section 5.3).

17.6 Inventory

- Free stock is sent to Kornit X as a whole number for each SKU, in batches of 100.

17.7 Shipments

- Each despatch marks the Kornit X order as despatched, with the tracking number.

17.8 Points to note

- Orders cannot be fetched from Kornit X. If an order has not arrived, check that the channel is enabled and ask Kornit X to send it again.

18. Not on the High Street

18.1 What it does

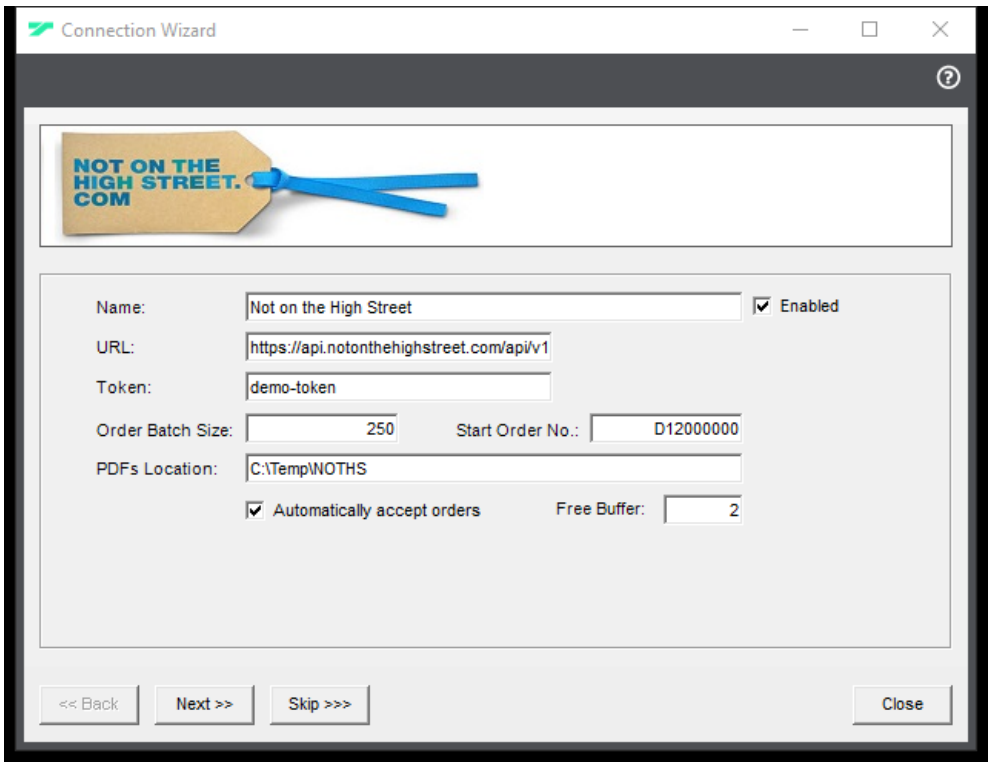
The Not on the High Street (NOTHS) channel downloads your NOTHS orders as stored orders – optionally accepting new orders automatically when you have the stock – so that you can convert them into Sage sales orders, and then marks them as dispatched on NOTHS with the tracking number and tracking link. A **Pricing** screen controls how a NOTHS line price is split when a product is sold with add-on options.

18.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Not On The High Street** (Operator Guide, section 4.2). The wizard has one **Connection** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The channel name. Required – "You need to provide a name".
Enabled	Switches the channel on.
URL:	The NOTHS API address. Filled in for you. Required – "You need to provide a url".
Token:	Your NOTHS API token. Required.
Order Batch Size:	Orders per page when downloading. Default 250.
Start Order No.:	Orders with a number at or below this are ignored – useful when you first connect, so that old orders are not downloaded.
PDFs Location:	The folder where NOTHS dispatch notes are saved before dispatch (section 18.7). Use a folder that the person or job bag sending the shipments can write to.
Automatically accept orders	Lets Channels accept new NOTHS orders when you have enough stock (section 18.3).
Free Buffer:	An order is only accepted automatically if the free stock of every item on it is more than this number.



Not on the High Street – connection page

18.3 Screens

Channels ▸ Not on the High Street has three entries: **Pricing**, **Order List** and **Shipment List**. The two lists are the shared lists (Operator Guide, sections 6.2 and 13.3); what is particular to NOTHS is described here.

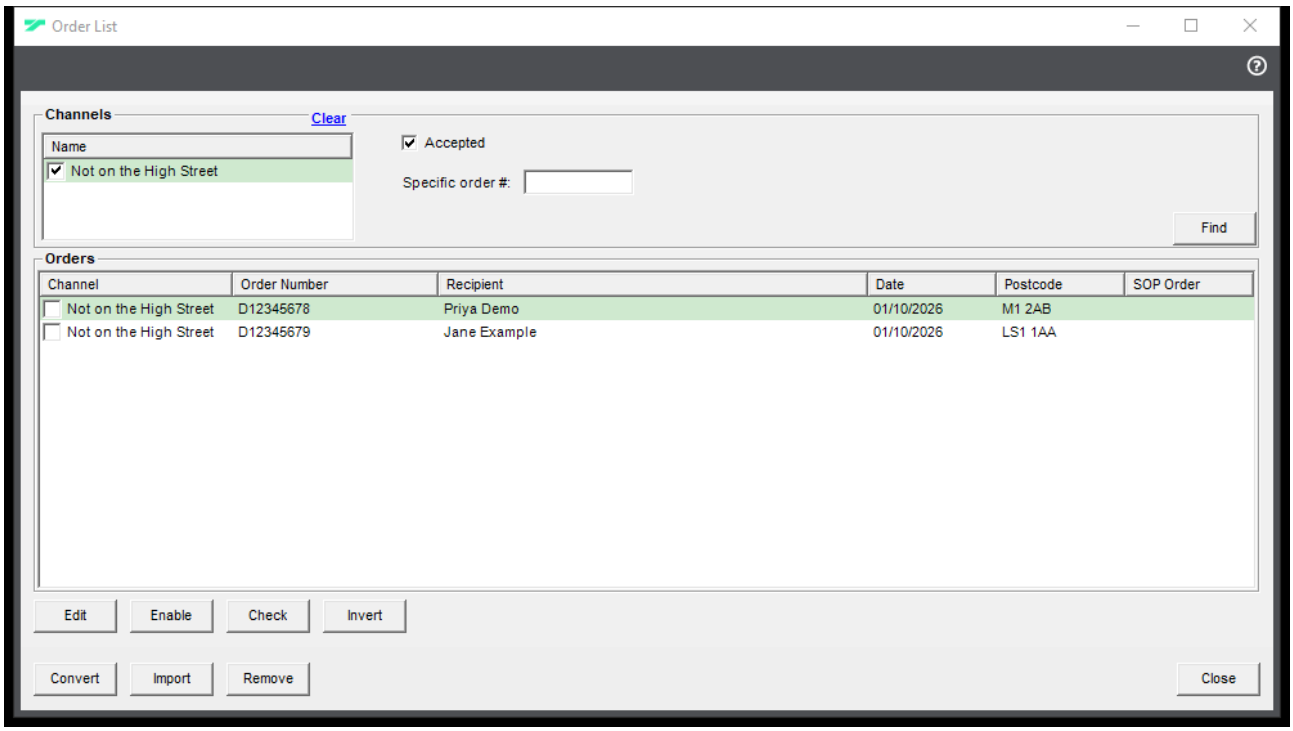
Order List

The **Order List** has two extra fields: **Accepted** (ticked when the screen opens) and **Specific order #:**. **Find** works like this:

1. If **Accepted** is ticked and the channel has **Automatically accept orders**, Channels downloads the orders waiting to be accepted, checks each one's stock against the latest stock snapshot, and accepts those with enough stock at NOTHS. The expected despatch date is worked back from the customer's expected delivery date (two days before, or one day for express services), avoiding weekends.
2. It then downloads orders: the specific order if you entered one; otherwise all accepted orders when **Accepted** is ticked, or every order on the account when it is not.
3. New orders appear in the list as stored orders, ready to convert.

> **Important:** With **Accepted** ticked and automatic acceptance switched on, **Find** accepts orders on NOTHS straight away. Take a stock snapshot first so that the stock check is current.

- When you **Remove** a stored order, Channels remembers it so that it is not converted if it is downloaded again.
- Unticking **Accepted** downloads the whole order history – use it for occasional checks only.
- Opening the screen does not contact NOTHS.



Not on the High Street – Order List

Shipment List

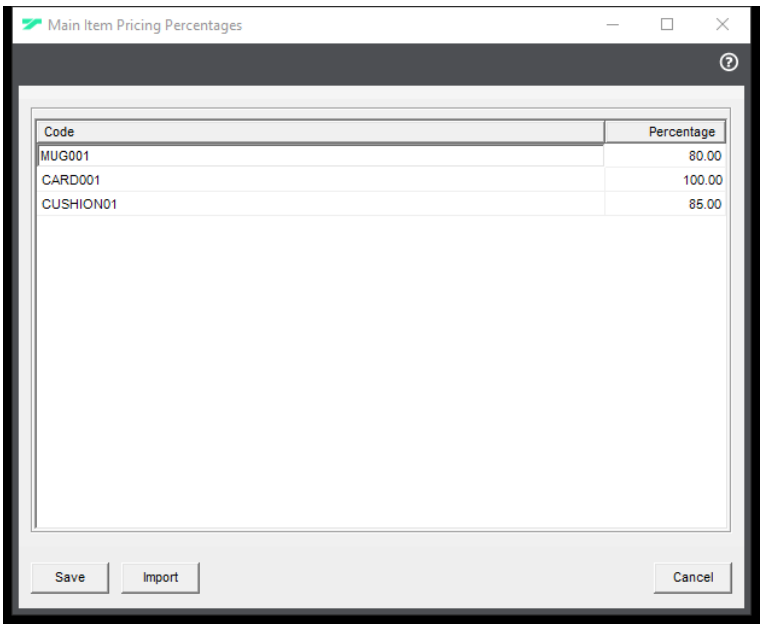
A despatch can only be ticked when its **Courier**, **Tracking** and **URL** are all filled in – NOTHS needs the tracking link. Use **Generate Tracking URLs** to fill in links from your courier set-up (Operator Guide, section 13.4).

Pricing

Some NOTHS products are sold with chargeable options, each with its own item code in brackets in the option text – for example “Gift box (GIFTBOX01)”. Each option becomes an extra line on the Sage order. **Pricing** opens **Main Item Pricing Percentages**, which sets, for a NOTHS product SKU, the **Percentage** of the NOTHS line price that stays on the main item; the rest is shared equally between the option lines.

Column	What it shows
Code	The NOTHS product SKU. Clear a row's code to delete the row.
Percentage	The share of the line price kept on the main item, for example 80.

Button	What it does
Import	Replaces all the rows with a CSV file of two columns (code, percentage) and no heading row. Channels warns first: “Importing values into this form will remove all existing values.” Errors name the line: “Not enough values on line <n>”, “Percentage does not appear to be numeric on line <n>”, “Code '<code>' is duplicated”.
Save	Saves your changes and closes the screen.
Cancel	Closes without saving.



Not on the High Street – pricing percentages

18.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	The same as **Find** with **Accepted** ticked – including automatic acceptance when it is switched on.
Process orders	Converts the stored orders. Orders you have removed, and orders already in Sage, are taken off the list.
Generate Tracking URLs	Fills in tracking links on despatches not yet sent (Operator Guide, section 13.4).
Create shipment feeds / Upload shipment feeds	Creates and sends dispatch details.
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

When automatic acceptance is on, schedule a stock snapshot before **Download new orders**.

18.5 Orders

- The NOTHS order ID is the stored order's identifier and the **Customer Document No**; the NOTHS order number is shown in the list.
- Each NOTHS item becomes a line for the product SKU, plus a line for each bracketed option, priced as set on the **Pricing** screen. Options without an item code (other than “No thanks”) are kept as **Personalisation** details on the line, and a gift message is kept on the order.
- Default mappings: Customer Account Number **NOTHS** (fixed), Customer Document No, delivery name and contact, Address 1 and 2, town (Address 3 and City), county (Address 4 and County), post code, country, the buyer's phone number, **Tax Inclusive** Yes, Payment Bank (your first Sage bank), Shipping Value (delivery charge), Item Code (SKU), Quantity and Unit Price. Change them in **Field Mapping** (Operator Guide, section 5.3).
- NOTHS promotion discounts are not added to the Sage order.

18.6 Inventory

There is no stock feed for NOTHS. Stock is only used for the automatic-acceptance check, which reads the latest stock snapshot (Operator Guide, section 11.3).

18.7 Shipments

- Before dispatching, Channels downloads each order's NOTHS dispatch note to **PDFs Location:** (in a sub-folder named after the order). NOTHS needs the note to have been opened before an order can be dispatched.
- Channels then dispatches the orders on NOTHS with the tracking number, the tracking link and an estimated delivery date two days after the export feed was created. Any order NOTHS rejects is listed in the export feed's errors (Operator Guide, section 14.4).

18.8 Points to note

- Set **Start Order No.:** when you first connect so that historic orders are left alone.
- When automatic acceptance is on, keep the stock snapshot current – it decides which orders are accepted.

19. ConnectWise

19.1 What it does

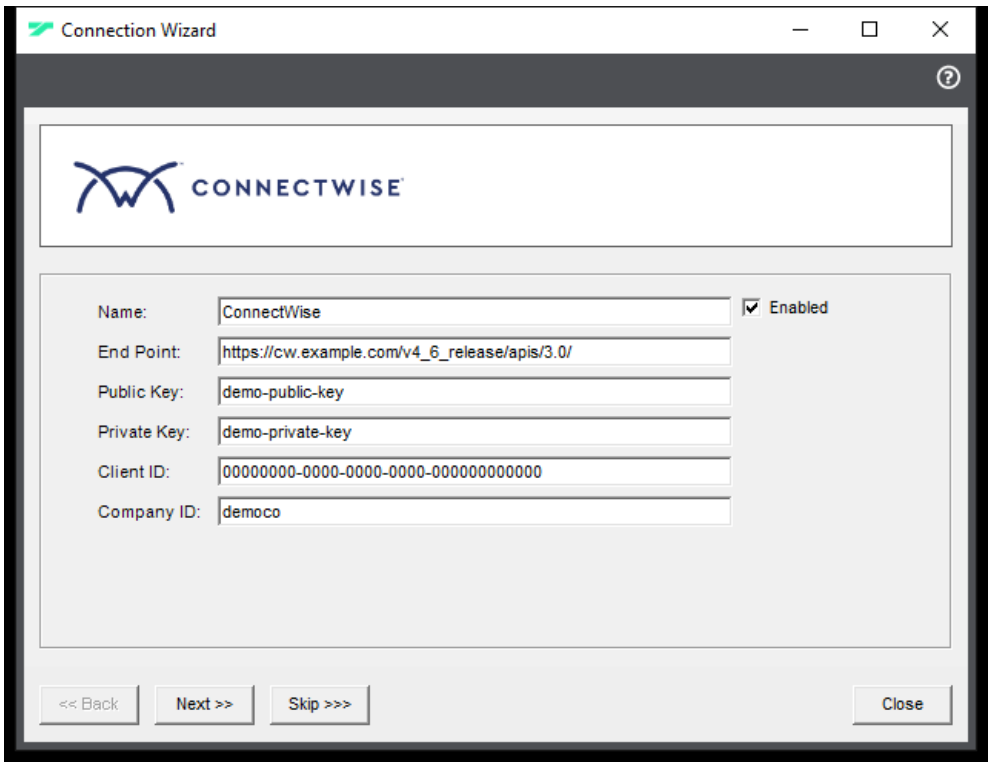
The ConnectWise channel downloads **sales orders** from ConnectWise PSA (Manage) as stored orders so that you can convert them into Sage sales orders. Nothing is sent back to ConnectWise.

19.2 Setting it up

Create an API member in ConnectWise first to obtain the keys. Then on **Channels ▸ Channel List** click **Add** and choose **Connect Wise** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

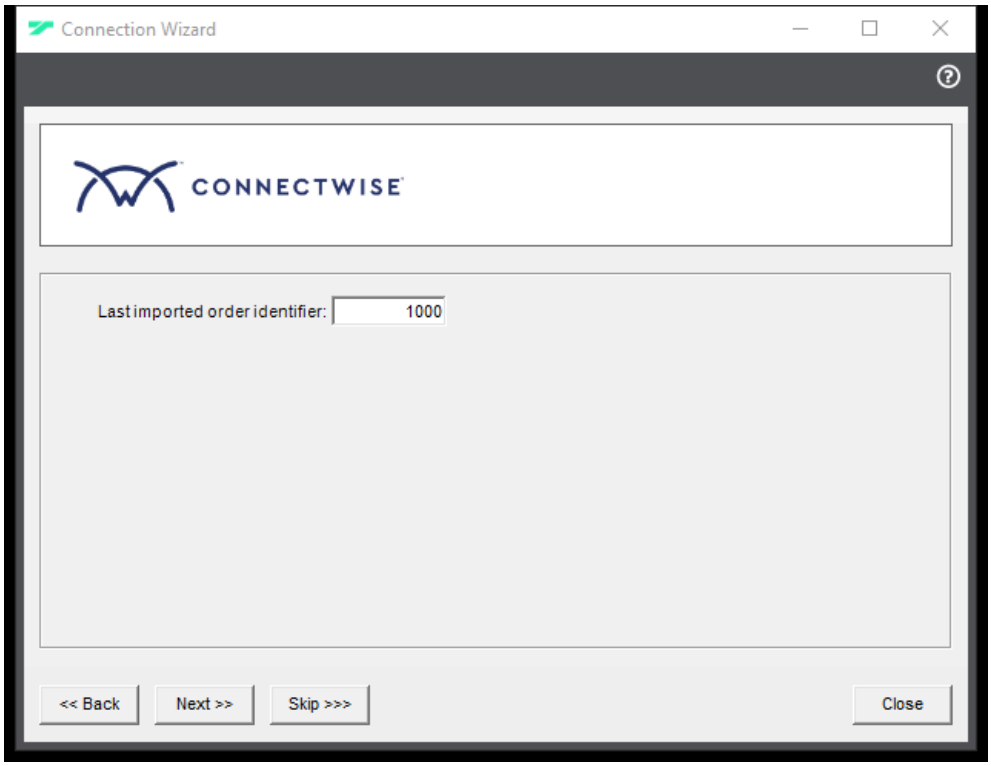
Field	What it does
Name:	The channel name. Required – "You need to provide a name".
Enabled	Switches the channel on.
End Point:	Your ConnectWise REST API address, for example `https://connectwise.example.com/v4_6_release/apis/3.0/`. Required – "You need to provide an end point".
Public Key:	The API member's public key. Required – "You need to provide a public key".
Private Key:	The API member's private key. Required – "You need to provide a private key".
Client ID:	Your ConnectWise developer client ID. Required – "You need to provide a client id".
Company ID:	The company ID you sign in to ConnectWise with. Required – "You need to provide a company id".



ConnectWise – connection page

Options page

Field	What it does
Last imported order identifier:	New-order downloads fetch ConnectWise sales orders with a higher ID than this, then set it to the highest ID downloaded. Set it to the last order you do not want, when you first connect.



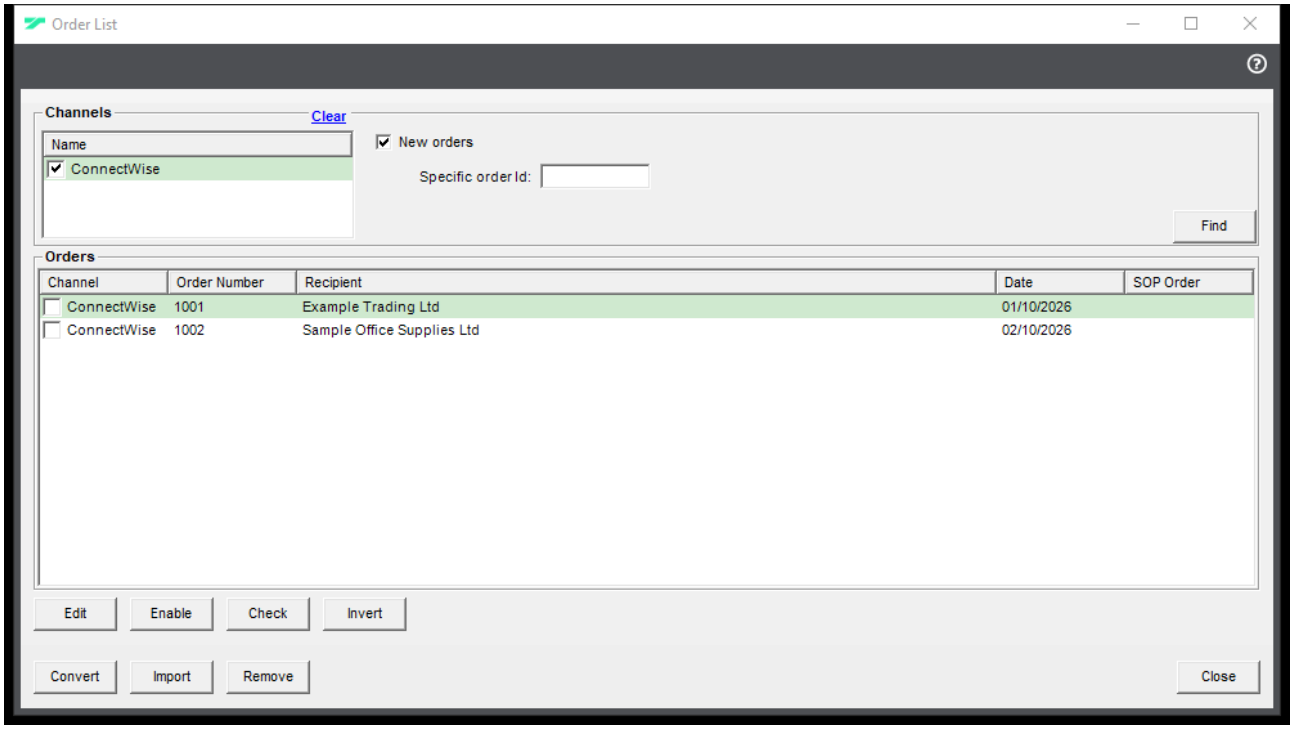
ConnectWise – options page

19.3 Screens

Channels ▸ **ConnectWise** has one entry, the **Order List** – the shared order list (Operator Guide, sections 6.2 to 6.5).

Order List

- The list shows **Order Number**, **Recipient**, **Date** and **SOP Order**.
- **New orders** (ticked when the screen opens): **Find** downloads sales orders after **Last imported order identifier:**, with their customer, ship-to company and products, and moves the identifier on.
- **Specific order Id:** downloads one sales order by its ConnectWise ID ("The Id needs to be an integer" if it is not a number). Typing an ID unticks **New orders**.
- Opening the screen does not contact ConnectWise.



ConnectWise – Order List

19.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	The same as **Find** with **New orders** ticked.
Process orders	Converts the stored orders; orders already in Sage are removed from the list.

19.5 Orders

- The ConnectWise sales order ID is the stored order's identifier and order number; the customer's company name is shown as the recipient.
- The delivery address is taken from the ship-to company's record in ConnectWise.
- Default mappings: Customer Account Number **CON001** (fixed), Customer Document No (PO number), delivery name, address lines 1 and 2, city, state (County), zip (Post Code), phone and e-mail, **Tax Inclusive** No, default warehouse, Line Number, Item Code (the product's vendor SKU), Description,

Quantity, Unit Price (price), Unit Cost (cost) and Discount Value. Change them in **Field Mapping** (Operator Guide, section 5.3).

- Also available to map: account number, contact, opportunity, billing terms, department, sales rep, notes, catalogue item identifier, unit of measure, tax code and warehouse.

19.6 Points to note

- Every sales order with a higher ID is downloaded, whatever its status in ConnectWise – review the list before converting.
- Products need a vendor SKU that matches a Sage item code or alias; otherwise change the Item Code mapping to the catalogue item identifier.

20. Channel Advisor

20.1 What it does

The Channel Advisor channel connects one Channel Advisor **profile** (seller account) to Sage. Channel Advisor gathers orders from the marketplaces you sell on – Amazon, eBay, CDiscount and others – and Channels takes them from there. It:

- downloads paid orders that Channel Advisor has not yet marked as exported as stored orders, and turns them into Sage sales orders;
- marks each order as exported in Channel Advisor once it is in Sage (the acknowledgement), so it is not offered again;
- sends shipments with the tracking number and, optionally, the carrier and class;
- sends free stock to Channel Advisor for one distribution centre, or for several when distribution-centre mapping is used;
- downloads Channel Advisor **adjustments** (refunds and cancellations) and records them in Sage;
- optionally handles Amazon FBA orders (fulfilled by Amazon), which are recorded in Sage as already despatched and invoiced.

A Channel Advisor refund window is also available from Tilted Retail when you refund an order that came from Channel Advisor (section 20.3).

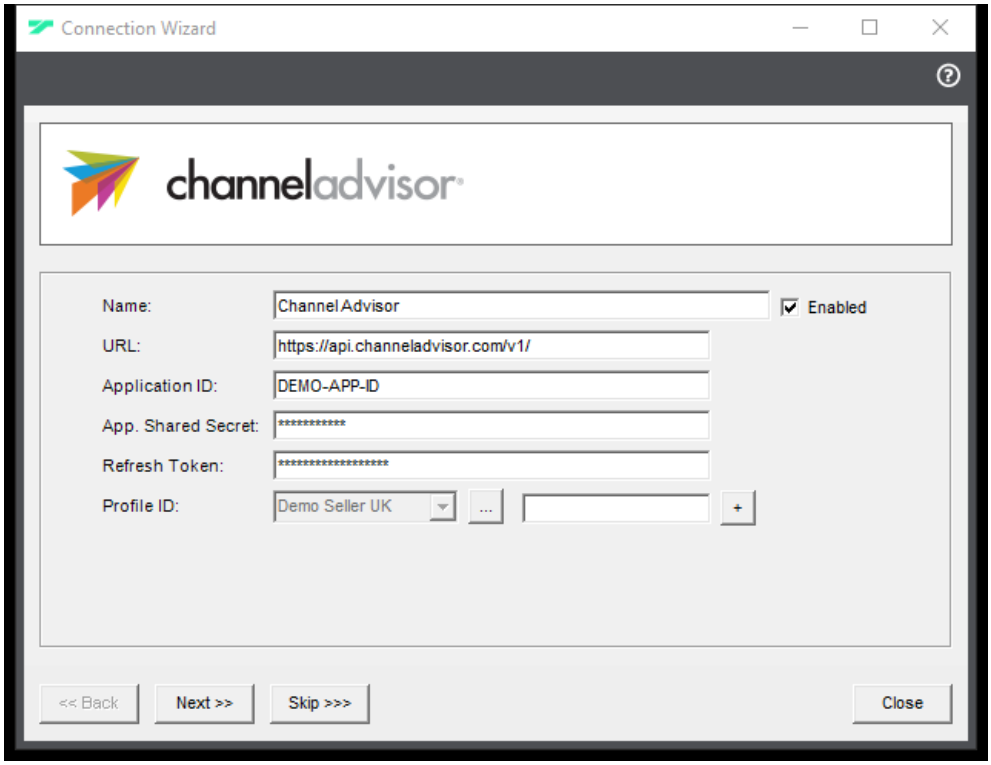
20.2 Setting it up

You need the application ID, shared secret and refresh token that Channel Advisor issues for your developer application. On **Channels ▸ Channel List** click **Add** and choose **Channel Advisor** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The name of this channel in Channels. Required.
Enabled	Tick to let the channel download and upload. A disabled channel is skipped by every job bag.
URL:	The Channel Advisor REST address. It is filled in for you; leave it unless Channel Advisor tells you otherwise.
Application ID:	The application ID of your Channel Advisor developer application.
App. Shared Secret:	The shared secret of that application.
Refresh Token:	The refresh token issued when the seller account authorised the application.

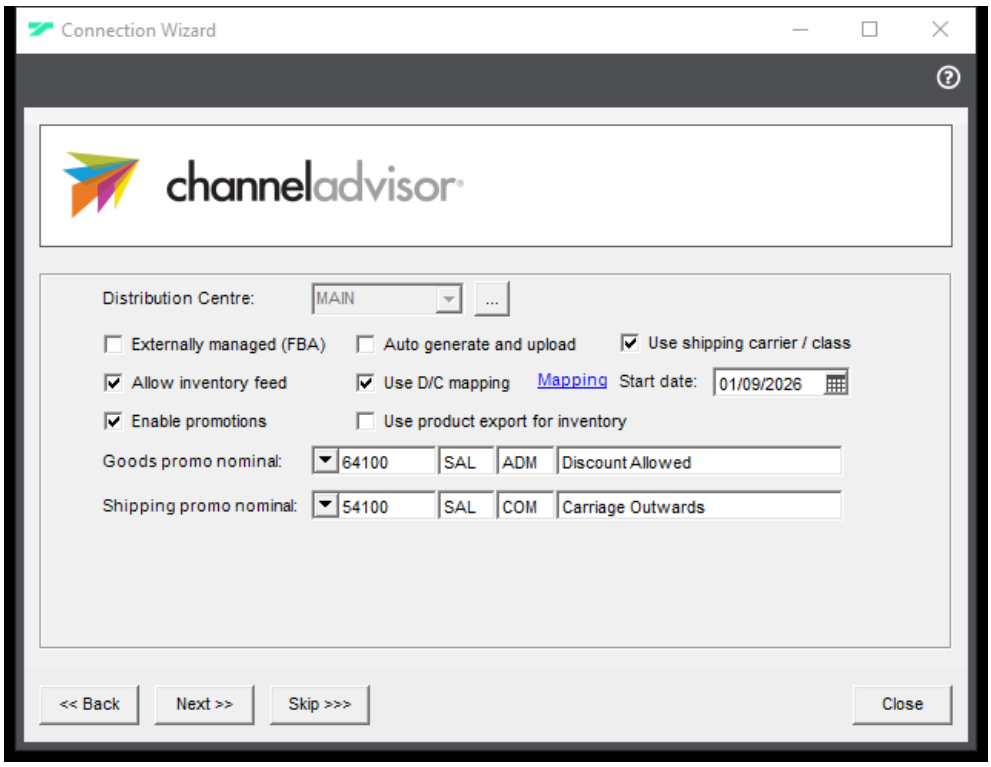
Field	What it does
Profile ID: and **...**	Click **...** to list the profiles these credentials can reach, then choose the seller profile this channel serves. Required.
Profile box and **+**	Requests access to another profile: type the profile ID and click **+**. The account holder must accept the request in Channel Advisor before the profile can be chosen.



Channel Advisor – connection page

Options page

Field	What it does
Distribution Centre: and **...**	Click **...** to list your Channel Advisor distribution centres and choose the one this channel downloads orders for and sends stock to. Required.
Externally managed (FBA)	Tick for a channel that downloads only Amazon FBA orders – orders Amazon has already shipped. Use a separate channel for your own (merchant-fulfilled) orders.
Allow inventory feed	Tick to send stock to Channel Advisor from this channel. Only channels with this ticked appear on the Inventory List.
Start date:	Orders created before this date are never downloaded. Required.
Use shipping carrier / class	Send the carrier and class with each shipment. They are sent only when both the Sage courier and service are mapped for this channel (Operator Guide, sections 5.5 and 5.6), otherwise Channel Advisor would reject the shipment.
Use D/C mapping	Route order lines to Sage warehouses by the Channel Advisor distribution centre that will fulfil them, and send stock per mapped warehouse. Enables the **Mapping** link.
Mapping	Refreshes the list of distribution centres from Channel Advisor and opens **Distribution Centre Mapping** (below).
Enable promotions	Add the order's item and shipping promotions to the Sage order as discount lines.
Goods promo nominal:	The nominal code for item-promotion discount lines.
Shipping promo nominal:	The nominal code for shipping-promotion discount lines.
Use product export for inventory	Compare stock against one Channel Advisor product export file instead of asking Channel Advisor for each product in turn – quicker for large catalogues.

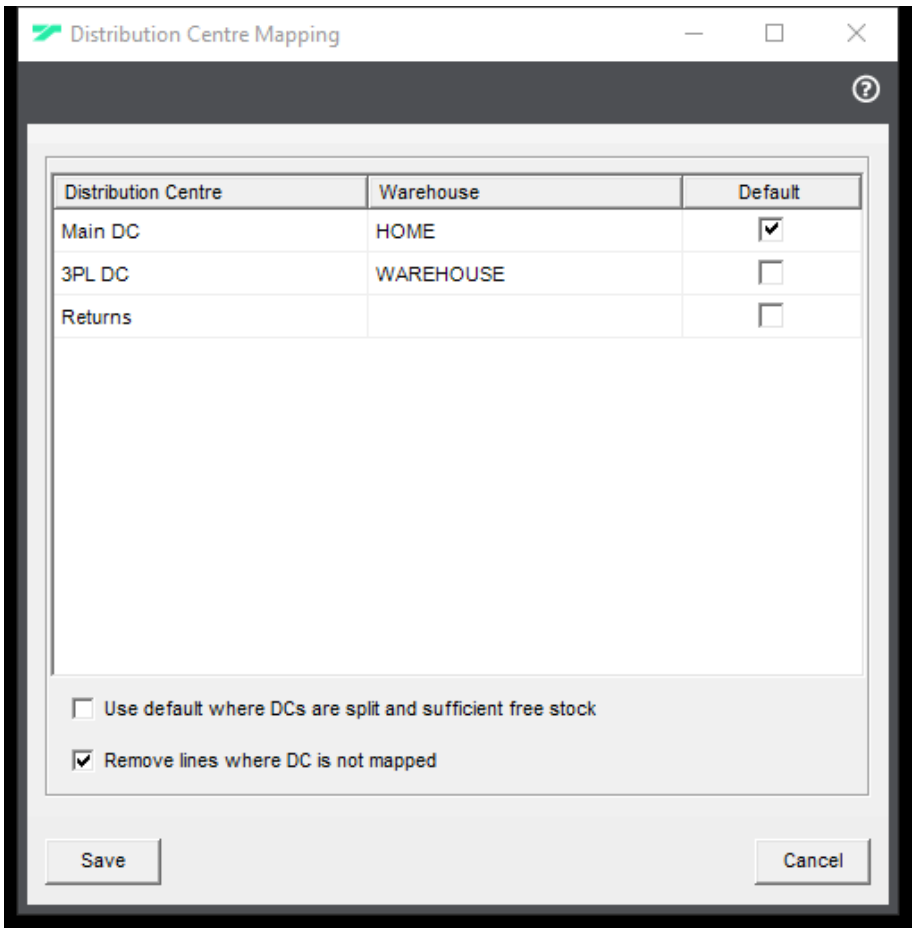


Channel Advisor – options page

Distribution Centre Mapping

Each row is a Channel Advisor distribution centre. Choose the Sage **Warehouse** that fulfils it and mark one row **Default**.

Field	What it does
Distribution Centre	The Channel Advisor distribution centre (read only).
Warehouse	The Sage warehouse its order lines are allocated from and whose stock is sent for it.
Default	The warehouse used when an order can be moved to a single warehouse (next option). Only one row can be the default.
Remove lines where DC is not mapped	Drop order lines that Channel Advisor assigns to a distribution centre with no Sage warehouse. An order left with no lines is removed and marked as exported in Channel Advisor.
Use default where DCs are split and sufficient free stock	When an order's lines fall to more than one warehouse, move them all to the default warehouse if it has enough free stock for every line.
Save / Cancel	Save the mapping, or close without saving.



Channel Advisor – distribution centre mapping

20.3 Screens

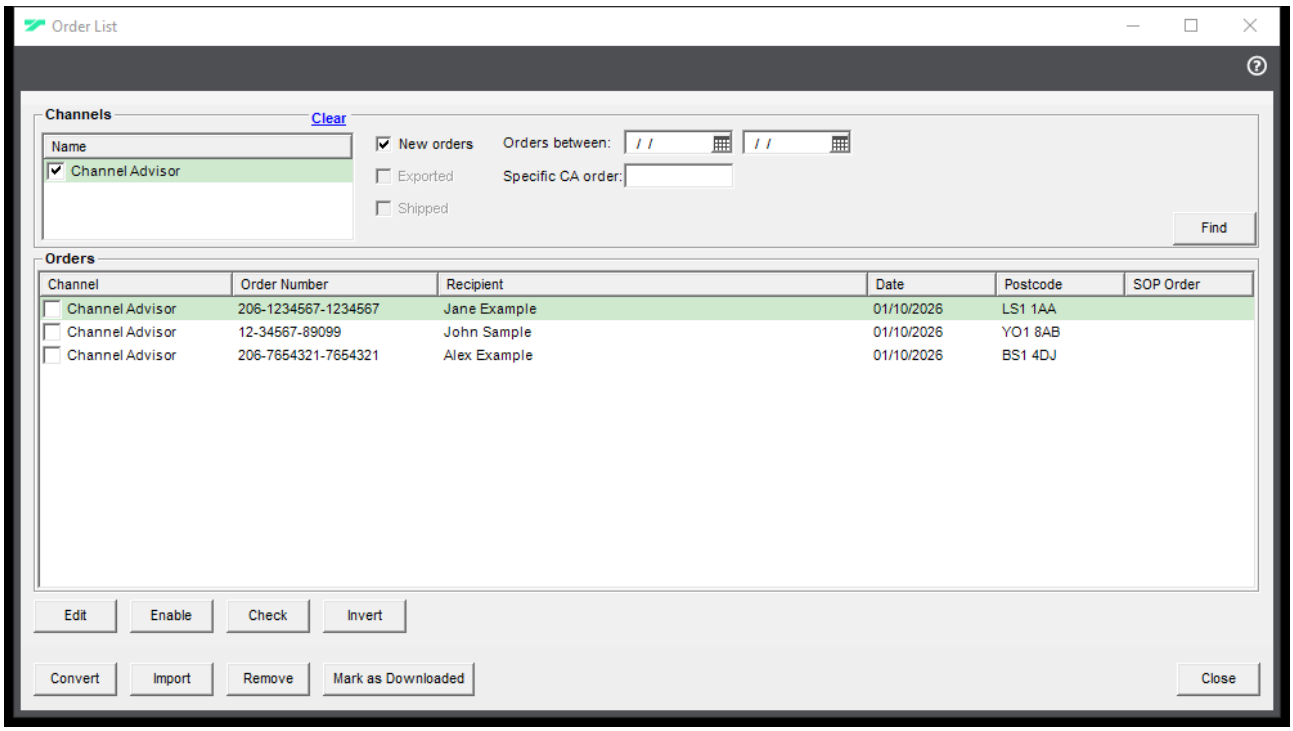
Channels ▸ Channel Advisor has five entries: **Order List**, **Converted Order List**, **Adjustment List**, **Shipment List** and **Inventory List**. The lists work as described in the Operator Guide (sections 6.2, 6.11, 13.3 and 11.6); what is particular to Channel Advisor is described here.

Order List

Shows the stored Channel Advisor orders not yet converted. The **Order Number** column shows the marketplace's own order number. To download, tick the channels and choose one search, then click **Find**:

- **New orders** – paid orders not yet exported, created on or after the channel's start date;
- **Orders between:** – orders created between two dates; tick **Exported** and/or **Shipped** to include orders Channel Advisor already has in those states;
- **Specific CA order:** – one order by its Channel Advisor order ID.

Mark as Downloaded removes the ticked orders from the list without converting them and tells Channel Advisor they have been exported, so they stop coming back. Use it only for orders you will not take into Sage – for example ones entered by hand.



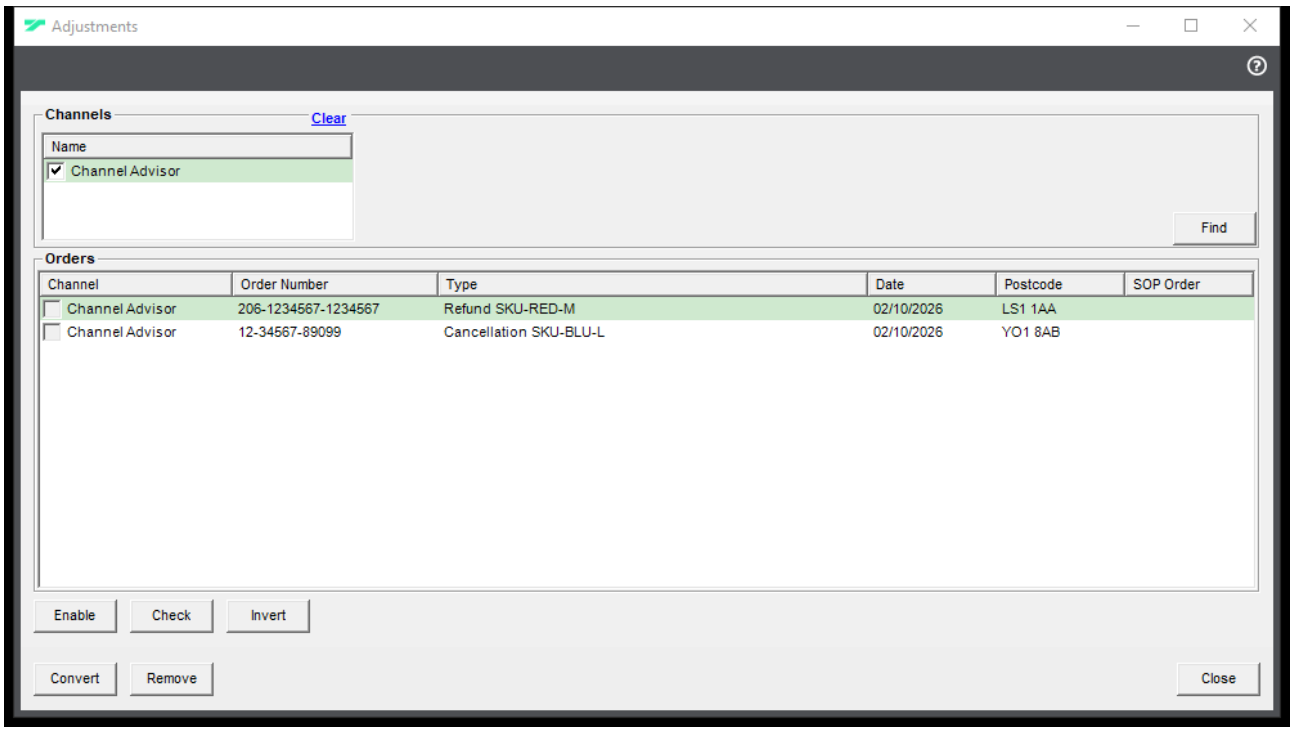
Channel Advisor – Order List

Converted Order List

Newly converted orders shows orders not yet acknowledged, whether or not they have been sent to a third-party warehouse – Channel Advisor must be told about every order. **Create Feed** creates acknowledgement export feeds.

Adjustment List

The **Adjustment List** (window title **Adjustments**) lists refunds and cancellations downloaded from Channel Advisor. The **Type** column shows the adjustment type and SKU, for example “Refund ABC123”. **Find** downloads adjustments made since the last download (the first download starts from that moment). Converting an adjustment records it in Sage (section 20.5).



Channel Advisor – Adjustment List

Shipment List and Inventory List

The **Inventory List** shows only channels with **Allow inventory feed** ticked; with distribution-centre mapping on, it asks you to **Choose Warehouse** when more than one warehouse is mapped, and builds the list for that warehouse's distribution centre.

Channel Advisor Refund

When you refund an order receipt in Tilted Retail and the order came from Channel Advisor, the **Channel Advisor Refund** window opens. Tick the items to refund, choose a **Reason** for each, and tick **Prevent site processing** if the marketplace should not process the refund itself. Orders from Amazon can only be refunded in full.

> **Important:** Clicking **Save** and confirming "Are you sure you want to refund this order?" posts the refund to Channel Advisor straight away.

20.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads new orders (as **New orders** on the Order List).
Process orders	Converts the stored orders into Sage sales orders and acknowledges them to Channel Advisor straight away. Orders already in Sage are removed from the list.
Create acknowledgement feeds	Creates acknowledgements for converted orders not yet acknowledged – for example orders converted by hand.
Upload acknowledgement feeds	Marks those orders as exported in Channel Advisor.
Download adjustments	Downloads new refunds and cancellations.
Process adjustments	Records adjustments in Sage. Adjustments for orders that are not in Sage are removed.
Generate Tracking URLs	Builds tracking links for shipments not yet sent (Operator Guide, section 13.4).
Create shipment feeds	Creates shipment export feeds for despatches that have all the required details.

Automation	What it does
Upload shipment feeds	Marks the orders shipped in Channel Advisor.
Download inventory items	Refreshes the list of your Channel Advisor products (SKU and product ID).
Create inventory Snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed	Creates a stock export feed for items whose stock has moved.
Create full inventory feed	Creates a stock export feed for all items.
Upload inventory feed	Sends the stock export feeds to Channel Advisor.
Clear Invoiced Delivery Details	Removes customer delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

20.5 Orders

- The default mappings use the customer account **CHANADV**, the marketplace order number as the customer document number, Channel Advisor's shipping name and address for delivery, the billing name as contact, and treat prices as **including** VAT. Lines use the SKU, title, unit price and quantity. Change them in **Field Mapping** (Operator Guide, section 5.3).
- Order tags from Channel Advisor are kept as order attributes; an IOSS number found in the order's private notes is captured for EU orders.
- With **Use D/C mapping**, each line goes to the warehouse mapped for the distribution centre Channel Advisor assigned it to; a line split between two distribution centres becomes two lines.
- With **Enable promotions**, item and shipping promotions are added as negative free-text lines on the nominal codes you chose.
- FBA orders (from an **Externally managed (FBA)** channel) are despatched and invoiced in Sage as soon as they are converted, and are never sent back to Channel Advisor as shipments.
- The acknowledgement marks the order as exported in Channel Advisor. When the **Process orders** automation converts orders it acknowledges them immediately; orders you convert from the Order List are acknowledged by **Create acknowledgement feeds** / **Upload acknowledgement feeds**.

Refunds and cancellations (adjustments)

Each refund is recorded as a refund payment against the order, using the bank account of the order's original receipt (the order must have been paid through Tilted Retail). A cancellation also reduces or removes the cancelled line on the Sage order – it cannot do so once the line has been despatched – and the order is cancelled when no lines remain.

20.6 Inventory

Stock is the Sage free stock calculated as described in the Operator Guide, section 11.1. Before sending, Channels asks Channel Advisor for its current quantity at the distribution centre and sends only items whose quantity differs. Run **Download inventory items** first so Channels knows each SKU's Channel Advisor product ID. With distribution-centre mapping, a separate export feed is created for each mapped warehouse and sent to its distribution centre.

20.7 Shipments

Each shipment sends the tracking number, the despatched quantity of each Channel Advisor order line and, with **Use shipping carrier / class**, the mapped carrier and class. Orders tagged by Amazon for in-store pick-up are sent as ready for pick-up without tracking. Invoices are not sent to Channel Advisor.

20.8 Points to note

- Use one channel per Channel Advisor profile, and a separate channel for FBA orders.
- Orders keep being offered until they are acknowledged; run the acknowledgement automations in the same job bag as the download.
- Refund and cancellation handling relies on orders paid through Tilted Retail.
- Choose the **Start date:** carefully on a new channel – every unexported paid order from that date is downloaded.

21. ChannelEngine

21.1 What it does

The ChannelEngine channel connects your ChannelEngine merchant account. ChannelEngine collects orders from the marketplaces you sell on (Bol.com, Zalando, Amazon and others). Channels:

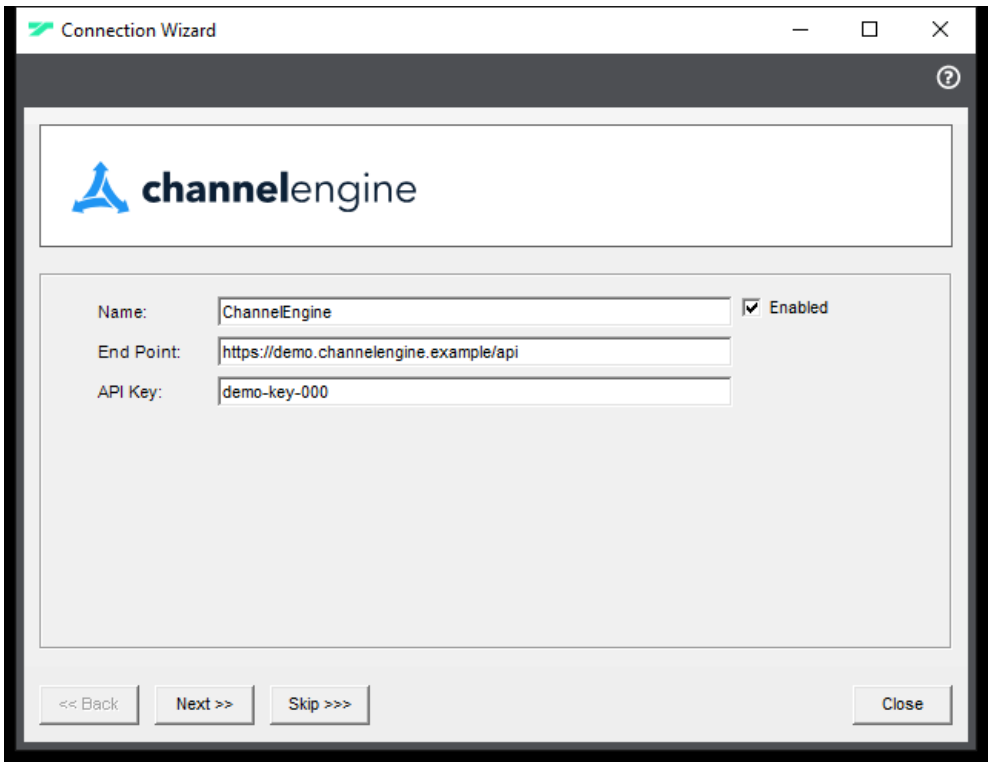
- downloads orders ChannelEngine holds as **new** as stored orders and turns them into Sage sales orders;
- acknowledges each order with its Sage order number;
- sends shipments with tracking;
- sends stock **and price** for each product – the price comes from a Sage price band, with an optional uplift;
- maps ChannelEngine stock locations to Sage warehouses, so order lines are allocated from the right warehouse.

21.2 Setting it up

Create an API key in ChannelEngine first (merchant settings). Then on **Channels ▸ Channel List** click **Add** and choose **ChannelEngine** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

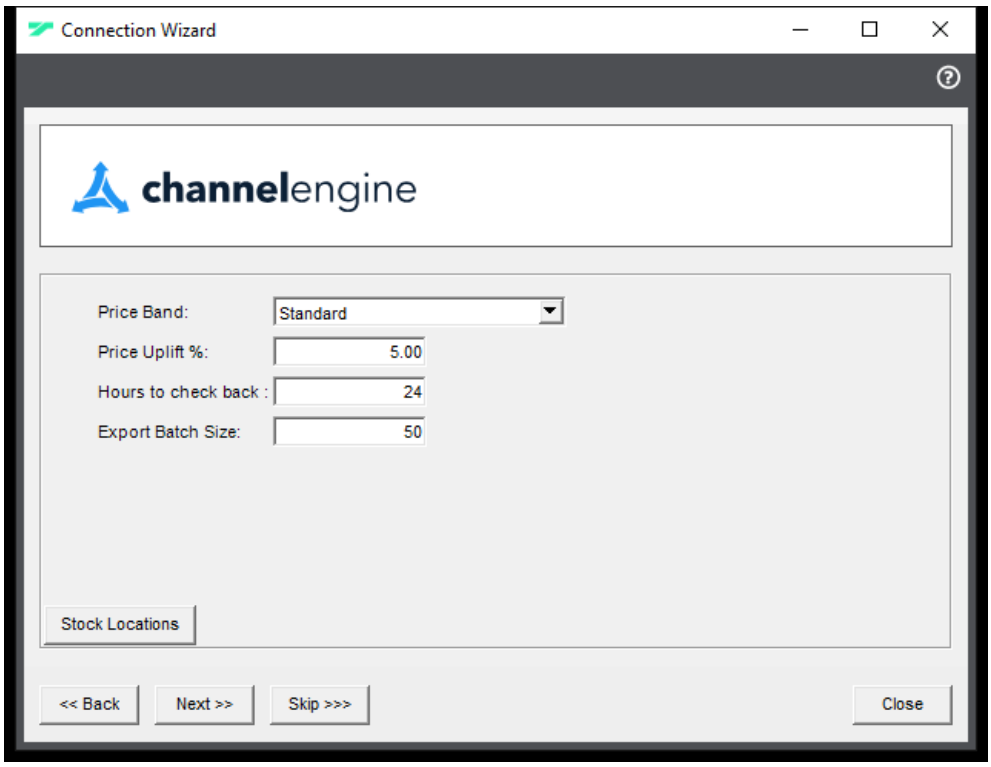
Field	What it does
Name:	The name of this channel. Required.
Enabled	Tick to let the channel run.
End Point:	Your ChannelEngine API address, for example `https://yourcompany.channelengine.net/api`. Required.
API Key:	The ChannelEngine merchant API key. Required.



ChannelEngine – connection page

Options page

Field	What it does
Price Band:	The Sage price band whose prices are sent to ChannelEngine with the stock. Required.
Price Uplift %:	A percentage added to the price-band price, rounded to two decimal places. Leave at 0 to send the band price.
Export Batch Size:	How many orders go into one acknowledgement or shipment export feed (default 50).
Stock Locations	Opens **Stock Location Mapping** (below).

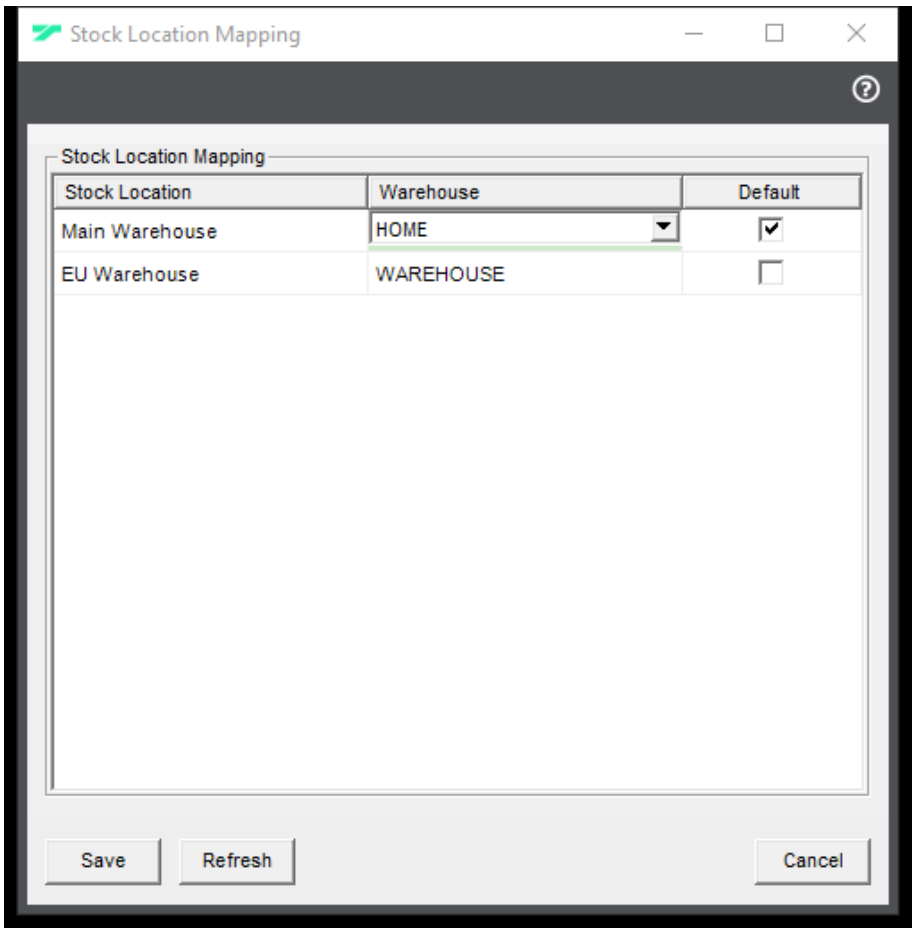


ChannelEngine – options page

Stock Location Mapping

Click **Refresh** to load your ChannelEngine stock locations, then choose the Sage **Warehouse** for each and mark one row **Default**. Click **Save**. Mapping is optional: with no rows, orders use the warehouse from the channel's mappings and stock goes to ChannelEngine's default location.

Field	What it does
Stock Location	The ChannelEngine stock location (read only).
Warehouse	The Sage warehouse that fulfils it.
Default	Used for order lines whose location is not mapped, and for stock updates. Only one row can be the default.
Refresh	Adds new ChannelEngine locations and updates their names.

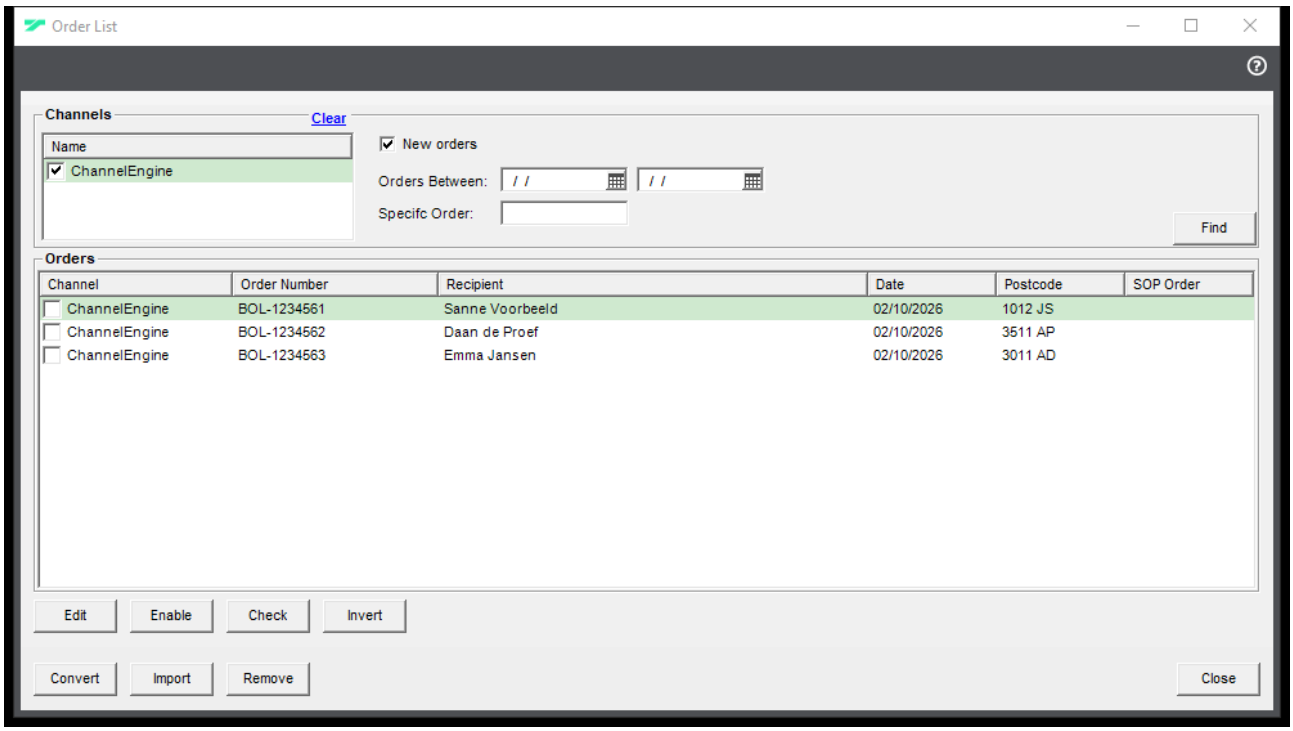


ChannelEngine – stock location mapping

21.3 Screens

Channels ▸ **ChannelEngine** has four entries: **Order List**, **Converted Order List**, **Shipment List** and **Inventory List** – the shared lists (Operator Guide, sections 6.2, 6.11, 13.3 and 11.6). What is particular to ChannelEngine:

- **Order List** – search by **New orders**, **Orders Between:** two dates (the end date defaults to today), or one order by its channel order number in **Specific Order:**, then click **Find**.
- **Converted Order List** – **Newly converted orders** shows every order not yet acknowledged, whether or not it has been sent to a third-party warehouse.
- **Inventory List** – uses the current style of inventory list. **Refresh Inventory Items** loads your ChannelEngine products.



ChannelEngine – Order List

21.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads the orders ChannelEngine holds as new.
Process orders	Converts the stored orders into Sage sales orders and acknowledges them straight away. Orders already in Sage are removed from the list.
Create acknowledgement feeds	Creates acknowledgements for converted orders not yet acknowledged.
Upload acknowledgement feeds	Sends them to ChannelEngine.
Generate Tracking URLs	Builds tracking links (Operator Guide, section 13.4).
Create shipment feeds	Creates shipment export feeds for despatches with all required details.
Upload shipment feeds	Sends the shipments.
Download inventory items	Refreshes the list of ChannelEngine products.
Create Inventory Snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed	Creates a stock and price export feed for items whose stock has moved.
Create full inventory feed	Creates a stock and price export feed for all items.
Upload inventory feed	Sends stock and prices to ChannelEngine.
Clear Invoiced Delivery Details	Removes delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

21.5 Orders

- The default mappings use customer account **CE001**, the channel order number as the customer document number, ChannelEngine's shipping name and address, phone and e-mail, the billing name as contact, and treat prices as **including** VAT. Lines use the merchant product number, the unit price including VAT and the quantity. The ChannelEngine line description is available if you want to map it. Change them in **Field Mapping** (Operator Guide, section 5.3).
- Addresses given as street name and house number (common in the Netherlands and Germany) are combined into the first address line.

- Each line is allocated from the warehouse mapped to its ChannelEngine stock location, or the default row.
- The acknowledgement sends ChannelEngine your **Sage sales order number** as the merchant order number; the same number identifies the order on shipments. Until an order is acknowledged ChannelEngine keeps offering it as new.

21.6 Inventory

Each product is sent with the Sage free stock (never below zero) for the default stock location and the price-band price plus any uplift. Items with no price in the band are sent with stock only.

21.7 Shipments

Each despatch is sent as a shipment with your Sage order number, the Sage courier as the shipping method, the tracking number and tracking link, and the despatched quantity of each line. Invoices, returns and cancellations are not exchanged.

21.8 Points to note

- Test with a ChannelEngine test account first – acknowledging and shipping change the orders on the marketplace.
- Keep the price band up to date: every stock upload also sets the selling price on ChannelEngine.
- Acknowledgements identify orders by the Sage order number, so the order must stay in Sage under the number that was sent.

22. StoreFeeder

22.1 What it does

This channel is for a business that **supplies** a retailer who runs StoreFeeder. The retailer raises purchase orders to you in StoreFeeder; Channels turns them into Sage sales orders and keeps StoreFeeder up to date:

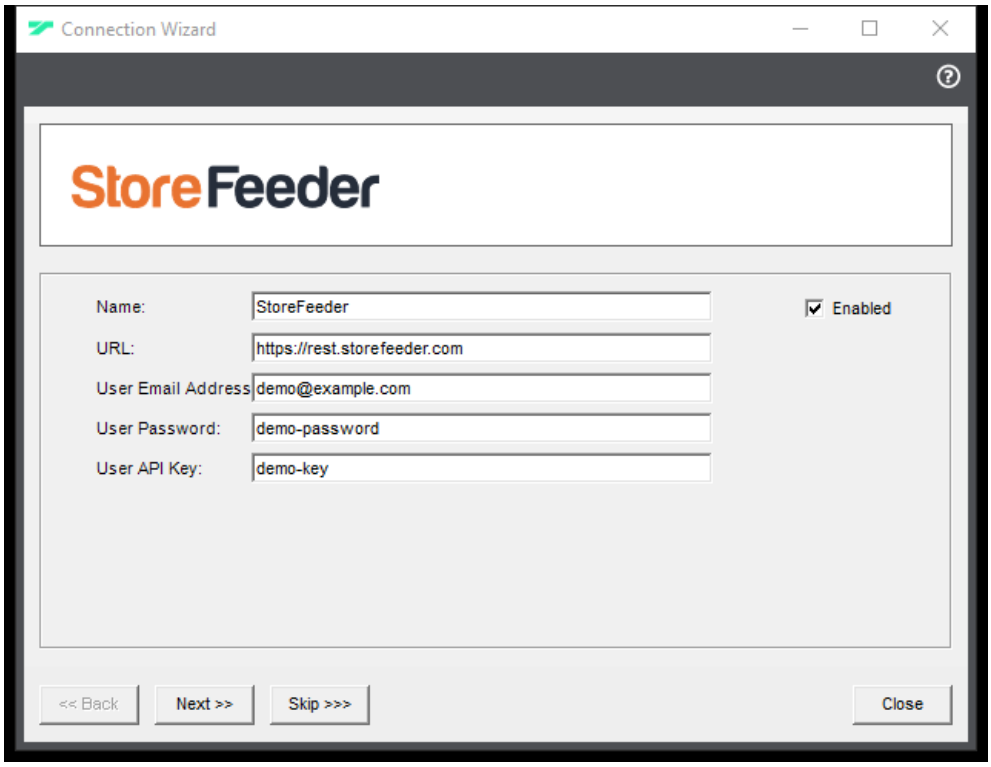
- downloads purchase orders StoreFeeder has sent to you (status “Sent to supplier”) as stored orders and converts them into Sage sales orders;
- confirms each purchase order in StoreFeeder (the acknowledgement);
- when you despatch, **books the purchase order in** at the retailer's StoreFeeder warehouse, so the stock is available for the retailer's waiting orders;
- sends your stock level for the products you supply;
- can **raise purchase orders** in StoreFeeder for the retailer's back-ordered sales orders that contain your products, and reserve Sage stock against those back orders.

22.2 Setting it up

You need a StoreFeeder user (e-mail, password and user API key) from the retailer, your supplier code in their StoreFeeder and the name of their warehouse. On **Channels ▸ Channel List** click **Add** and choose **Store Feeder** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The name of this channel. Required.
Enabled	Tick to let the channel run.
URL:	The StoreFeeder API address, filled in for you.
User Email Address:	The StoreFeeder user's e-mail address. Required.
User Password:	That user's password. Required.
User API Key:	That user's API key. Required.

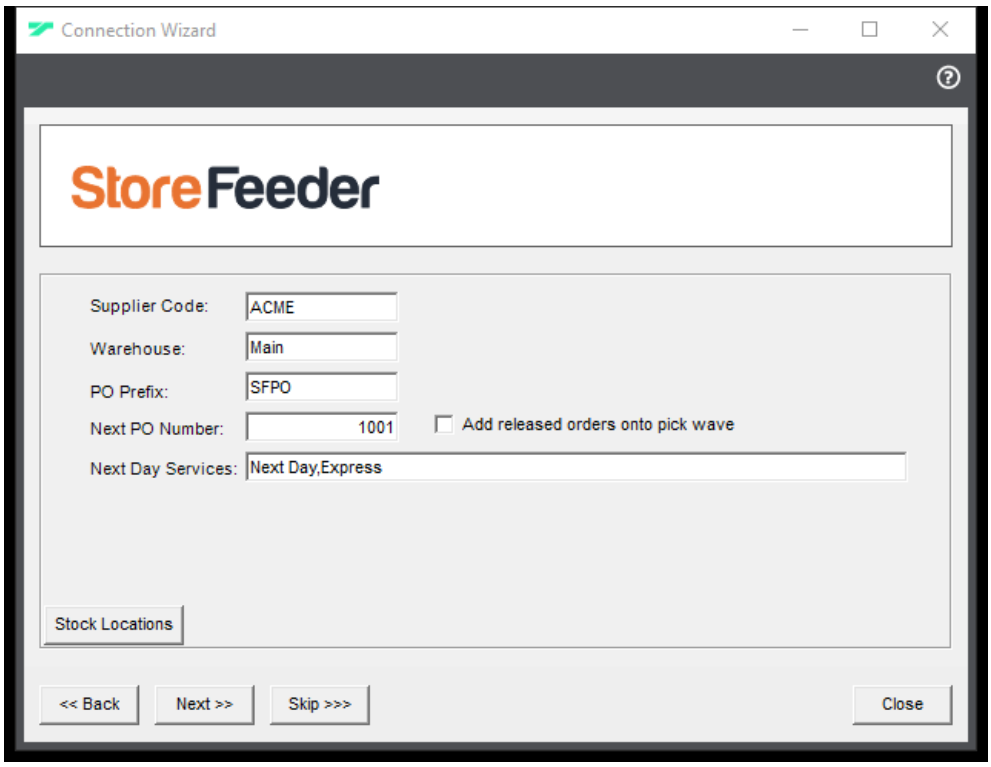


StoreFeeder – connection page

Options page

Field	What it does
Supplier Code:	Your supplier code in the retailer's StoreFeeder. Required.
Warehouse:	The name of the retailer's StoreFeeder warehouse you deliver to. Required.
PO Prefix:	Prefix for purchase orders raised by **Raise Purchase Orders**.
Next PO Number:	The next number. The reference is the prefix followed by the number, padded with zeros to ten characters; next-day runs add "-ND".
Add released orders onto pick wave	When a purchase order is booked in, ask StoreFeeder to add the sales orders it releases to a pick wave.
Next Day Services:	The StoreFeeder shipping methods (comma-separated, as named in StoreFeeder) that count as next day.
Stock Locations	Opens the list of the warehouse's stock locations (below).

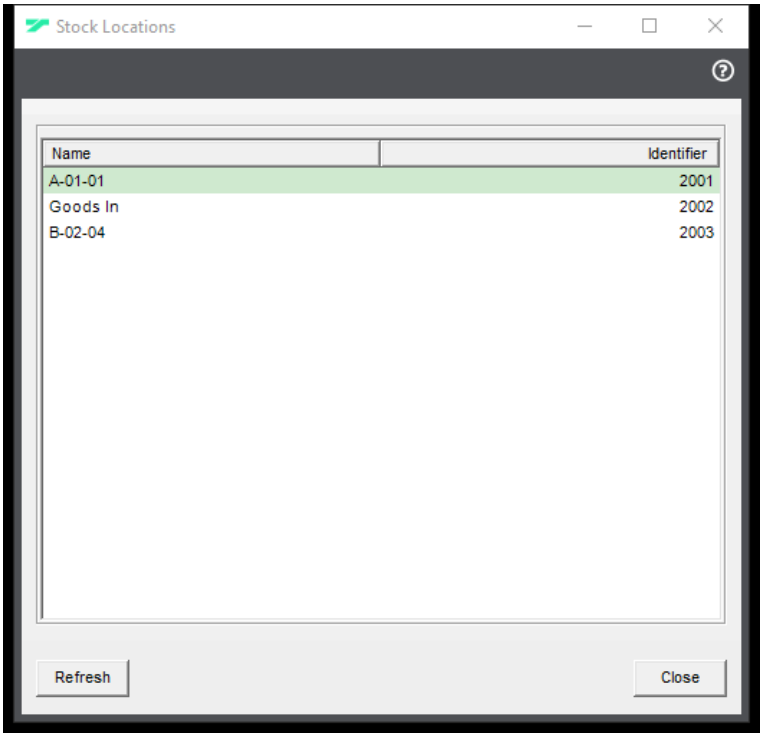
> When you leave the Options page Channels checks the supplier code and warehouse name with StoreFeeder, so the connection details must be right before you click **Next >>**.



StoreFeeder – options page

Stock Locations

Lists the stock locations of the retailer's warehouse with their **Identifier**. Click **Refresh** to reload them from StoreFeeder. When you despatch an order, enter the identifier of the location the goods are booked into as the shipment's **tracking number** – Channels uses it to book the purchase order in at that location.



StoreFeeder – stock locations

22.3 Screens

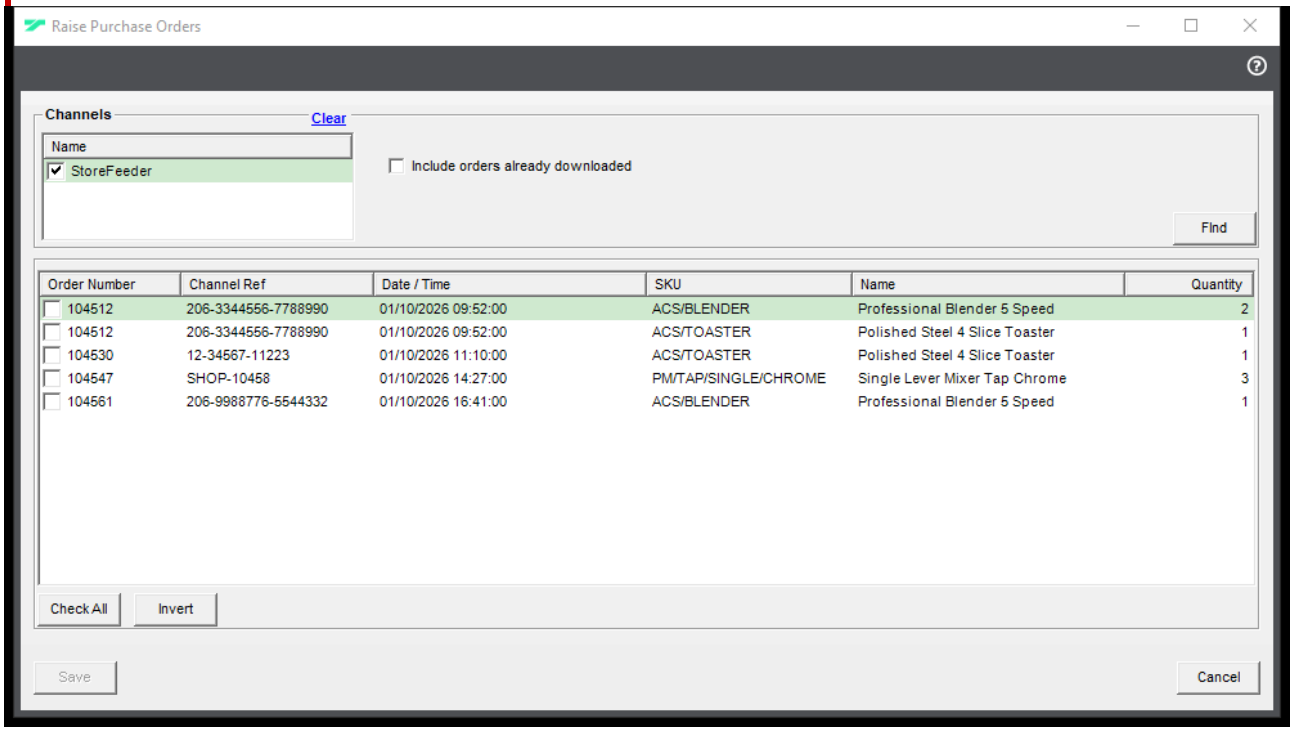
Channels ▸ **StoreFeeder** has five entries: **Order List**, **Raise Purchase Orders**, **Converted Order List**, **Shipment List** and **Inventory List**. The lists are the shared lists (Operator Guide, sections 6.2, 6.11, 13.3 and 11.6). What is particular to StoreFeeder:

- **Order List** – tick **New orders** and click **Find** to download purchase orders sent to you. The **Order Number** column shows the purchase order reference.
- **Converted Order List** – **Create Feed** creates purchase-order confirmations (up to 50 per export feed).
- **Shipment List** – **Create Feed** creates book-in export feeds, keeping next-day purchase orders (references ending "-ND") in their own export feed.
- **Inventory List** – uses the current style of inventory list. **Refresh Inventory Items** loads the products in StoreFeeder.

Raise Purchase Orders

Tick one StoreFeeder channel and click **Find** to list the retailer's back-ordered sales-order lines (out of stock or part stock) for products you supply; tick **Include orders already downloaded** to include ones already handled. Tick the lines – **Check All** and **Invert** help – and click **Save**. Channels groups them into purchase orders (whole sales orders are kept together, up to 30 orders per purchase order), creates each purchase order in StoreFeeder, marks it as sent to you and marks the sales orders as downloaded. You are told "<n> Purchase Orders Raised", with any errors listed.

> **Important:** **Find** first releases the retailer's held StoreFeeder orders (held orders without "attention required" are set back to ready to pick), and **Save** creates purchase orders in StoreFeeder straight away. Use this screen only when you intend to raise purchase orders.



StoreFeeder – Raise Purchase Orders

22.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Generate Backorder Allocations	For each back-ordered line on the retailer's StoreFeeder orders, reserves Sage stock for the channel's customer (a customer stock allocation with the StoreFeeder order number as reference) when the default warehouse has enough free stock; removes the reservation when the back order disappears from StoreFeeder. Needs **Customer Account Number** and **Default Warehouse** mapped as fixed values.
Raise Purchase Orders	As the **Raise Purchase Orders** screen, for every back order. Add the parameter `-NEXTDAY` to raise purchase orders for next-day shipping methods only.
Download new orders	Downloads purchase orders sent to you.
Process orders	Converts the stored orders into Sage sales orders; orders already in Sage are removed from the list.
Create acknowledgement feeds	Creates confirmations for converted purchase orders.
Upload acknowledgement feeds	Confirms the purchase orders in StoreFeeder.
Generate Tracking URLs	Builds tracking links (Operator Guide, section 13.4).
Create shipment feeds	Creates book-in export feeds for despatched purchase orders.
Upload shipment feeds	Books the purchase orders in at the StoreFeeder warehouse (section 22.7).
Download inventory items	Refreshes the list of StoreFeeder products.
Create inventory Snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Create delta inventory feed	Creates a stock export feed for items whose stock has moved.
Create full inventory feed	Creates a stock export feed for all your products.
Upload inventory feed	Sends your stock levels to StoreFeeder.

22.5 Orders

- The default mappings use customer account **STORFEED**, the purchase order reference as the customer document number, the date raised as the document date, and the product SKU, unit price and quantity ordered for lines. Purchase orders carry no delivery address – the goods go to the retailer's warehouse. Change the mappings in **Field Mapping** (Operator Guide, section 5.3).
- Each line keeps the StoreFeeder product ID and SKU; they are needed when the purchase order is booked in.
- The acknowledgement confirms the purchase order in StoreFeeder.

22.6 Inventory

Stock is sent as your supplier stock level for products whose supplier list in StoreFeeder includes you, up to 100 products per export feed. Products you do not supply are skipped.

22.7 Shipments

Sending a book-in export feed books each purchase order in at the retailer's warehouse: every despatched line is booked in with its quantity at the stock location whose identifier you entered as the tracking number. While an export feed is being booked in, the retailer's other waiting sales orders are put on hold and released again afterwards, so the stock goes to the right orders: stock booked in on next-day purchase orders to next-day sales orders, the rest to the others. Invoices are not sent.

> **Important:** Booking in adds stock in the retailer's StoreFeeder. Do not resend a book-in export feed that has already been processed.

22.8 Points to note

- Agree with the retailer which stock location each delivery is booked into, and use its identifier as the tracking number.

- Set **Next Day Services:** to exactly the shipping-method names used in StoreFeeder.
- Purchase order numbers come from **PO Prefix:** and **Next PO Number:**; the number moves on every time a purchase order is raised.

23. Virtual Stock

23.1 What it does

Virtual Stock ("The Edge") handles drop-ship orders for a number of UK retailers. The retailer's customer orders reach you through Virtual Stock and you deliver direct to the customer. Channels:

- downloads new orders (and, over the REST interface, cancellations) as stored orders and turns them into Sage sales orders;
- acknowledges orders – with back orders and expected dispatch and delivery dates if you wish;
- confirms booked delivery dates, despatches (with carrier and tracking) and invoices;
- records delivered orders.

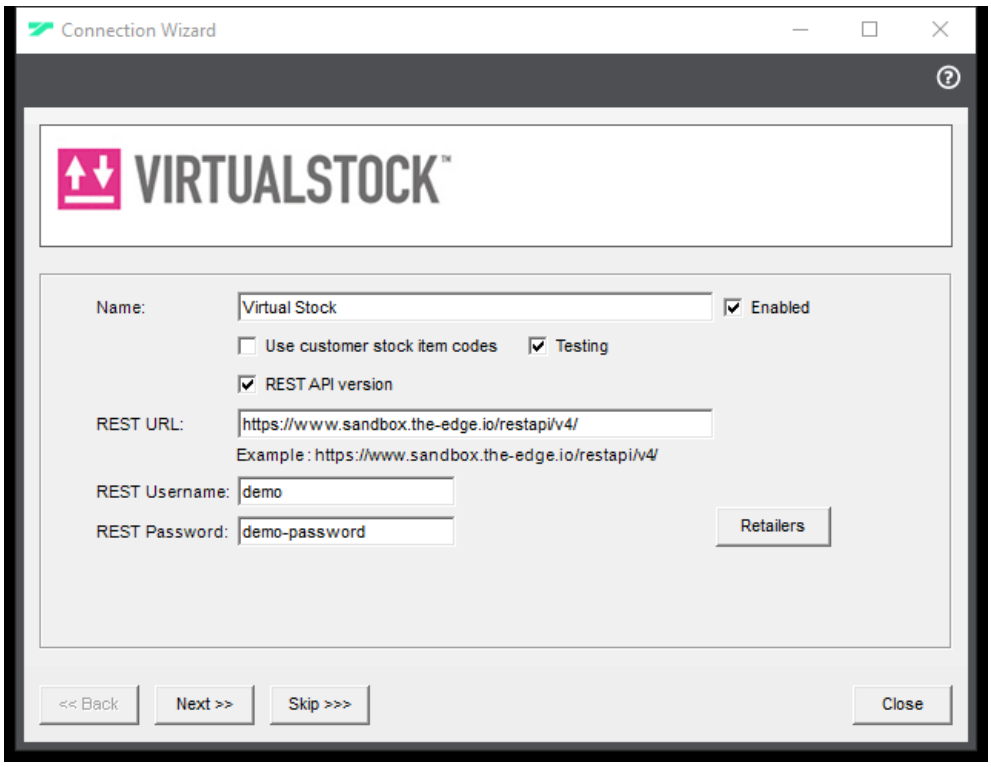
Two connection methods are available: the **REST API** (recommended) or **FTP/SFTP** with CSV files. Stock levels for Virtual Stock are sent through a separate Inventory channel (section 23.6).

23.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Virtual Stock** (Operator Guide, section 4.2). The wizard has three Virtual Stock pages – **Connection**, **FTP** and **Options** – followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The name of this channel. Required.
Enabled	Tick to let the channel run.
Testing	Mark acknowledgements and booking confirmations as test messages. Untick when you go live.
Use customer stock item codes	Send the customer's own item codes (Sage customer item codes) as part numbers instead of your Sage item codes. Invoices always use the customer's codes.
REST API version	Use the Virtual Stock REST API. When ticked, the FTP page can be ignored – you are told "You can ignore the next page regarding FTP settings as you've opted to use the REST API interface".
REST URL:	The REST API address given by Virtual Stock, for example `https://www.sandbox.the-edge.io/restapi/v4/` for testing. Required with REST.
REST Username:	Your API username. Required with REST.
REST Password:	Your API password. Required with REST.
Retailers	Opens the list of retailers (below).



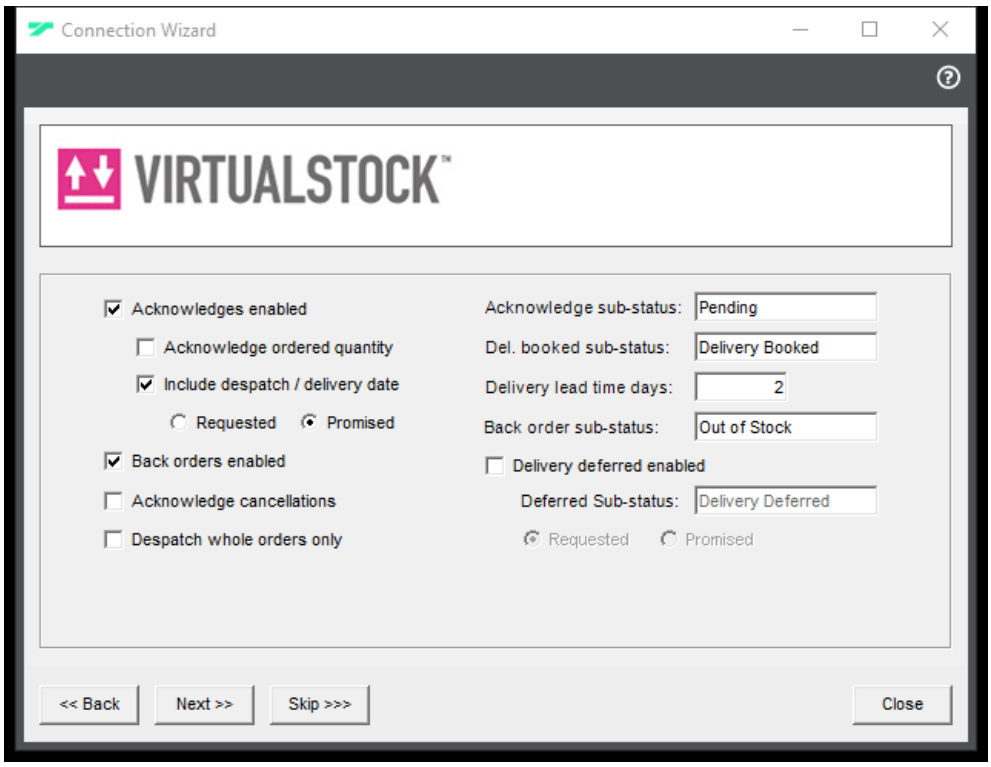
Virtual Stock – connection page

FTP page

Only for the FTP/SFTP method: tick **FTP Enabled**, choose the **Connection:** (an FTP site set up on **Settings** ▸ **FTP Sites** – Operator Guide, sections 3.2 and 4.8) and enter the folders Virtual Stock gave you. Orders are collected from the connection's incoming folder. Port 21 is used for FTP and port 22 for SFTP.

Options page

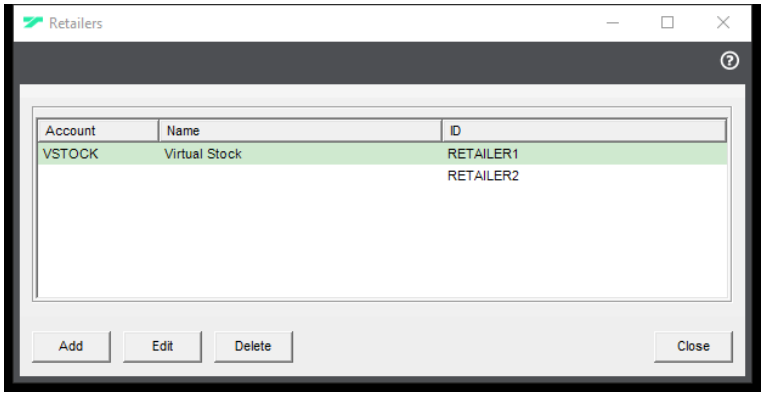
Field	What it does
Acknowledges enabled	Enables the sub-status fields below.
Acknowledge sub-status:	The sub-status sent with acknowledged lines (blank sends “Order Acknowledged”).
Del. booked sub-status:	The sub-status sent when a delivery date has been booked.
Acknowledge ordered quantity	Acknowledge the full quantity ordered. Untick to acknowledge only the quantity allocated in Sage.
Include despatch / delivery date	Send an expected dispatch date (the order's **Requested** or **Promised** date) and a delivery date that many days later.
Requested / Promised	Which Sage order date is the dispatch date.
Delivery lead time days:	Days from dispatch to delivery (also used on despatch confirmations).
Back orders enabled	Send the unallocated quantity as back-ordered (not available when acknowledging the ordered quantity).
Back order sub-status:	The sub-status for back-ordered lines (blank sends “Out of Stock”).
Acknowledge cancellations	Confirm cancellations to Virtual Stock once they have been processed in Sage.
Despatch whole orders only	Send despatch and invoice confirmations only when the whole order has been despatched or invoiced.
Delivery deferred enabled	When the booked delivery date is later than the order's date, send the deferred sub-status instead.
Deferred Sub-status: and **Requested / Promised**	The sub-status for deferred deliveries, and which order date the booked date is compared with.



Virtual Stock – options page

Retailers

Invoices must tell Virtual Stock which retailer they are for. In **Retailers** click **Add** and in **Retailer** choose the Sage **Customer:** and enter the Virtual Stock retailer **Identifier:**, or tick **All customers** for a retailer ID that applies to every customer. **Edit** and **Delete** maintain the list.



Virtual Stock – retailers

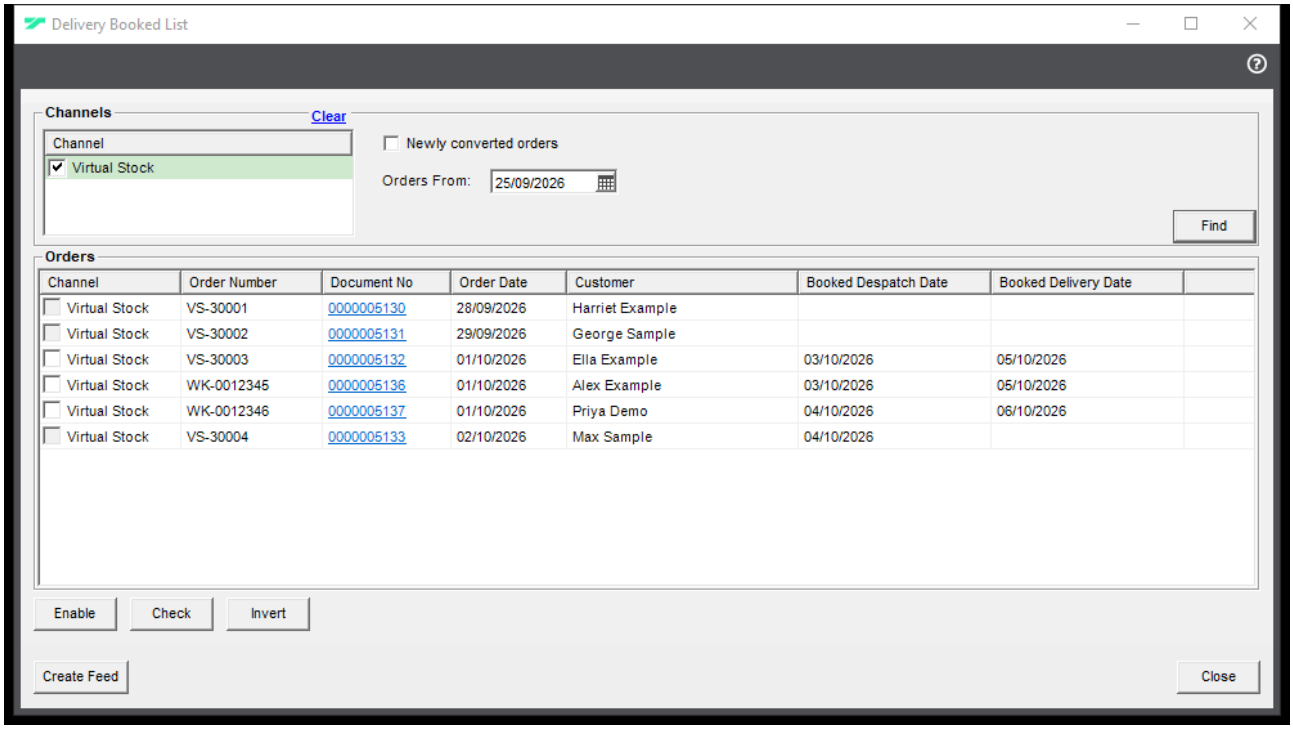
23.3 Screens

Channels ▸ Virtual Stock has seven entries: **Order List**, **Converted Order List**, **Delivery Booked List**, **Shipment List**, **Delivered Order List**, **Invoice List** and **Inventory List**. They are the shared lists (Operator Guide, sections 6.2, 6.11, 6.12, 13.3, 13.5 and 11.6). What is particular to Virtual Stock:

- **Order List** – tick **New orders** and click **Find** to download new orders (and cancellations over REST), or enter a **Specific order ref:** (REST only). With FTP, **Find** collects the order files and imports them; **Import** loads files you have saved yourself.
- **Converted Order List** – **Create Feed** creates acknowledgements.
- **Delivery Booked List** – orders with a **Booked Despatch Date** and **Booked Delivery Date**. **Newly converted orders** asks any delivery-booking add-on you use for the booked dates and lists orders

whose booking has not been confirmed; you can also type the dates into the grid. **Create Feed** confirms the bookings.

- **Shipment List** – **Create Feed** creates despatch confirmations.
- **Delivered Order List** – despatched orders with a **Delivered Date**, normally filled in from carrier tracking (Operator Guide, section 13.6). **Max order age (days):** limits **Newly despatched orders** (default 30).
- **Invoice List** – **Create Feed** creates invoice confirmations.
- **Inventory List** – stock for Virtual Stock is sent through an Inventory channel (section 23.6).



Virtual Stock – Delivery Booked List

23.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads new orders (REST: also cancellations; FTP: collects and imports the order files).
Process orders	Converts the stored orders and cancellations; orders already in Sage are removed from the list.
Create acknowledgement feeds	Creates acknowledgements for converted orders.
Upload acknowledgement feeds	Sends acknowledgements, back orders and cancellation confirmations.
Create delivery booked feeds	Collects booked delivery dates and creates booking confirmations.
Upload delivery booked feeds	Sends them.
Generate Tracking URLs	Builds tracking links (Operator Guide, section 13.4).
Create shipment feeds	Creates despatch confirmations.
Upload shipment feeds	Sends them.
Create invoice feeds	Creates invoice confirmations for posted invoices.
Upload invoice feeds	Sends them.
Clear Invoiced Delivery Details	Removes delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

23.5 Orders

- The default mappings use customer account **VSTOCK**, Virtual Stock's order number, order date and promised date, the shipping name, address, phone and e-mail, and treat prices as **excluding** VAT. Lines use the part number, description, quantity and unit cost price. Change them in **Field Mapping** (Operator Guide, section 5.3).
- Retail tax rules apply to Virtual Stock orders (Operator Guide, sections 3.9 and 5.1).
- A cancellation from Virtual Stock contains only the cancelled lines and quantities and is processed as a change to the existing Sage order (Operator Guide, section 6.8).
- Acknowledgements send, for each line, the allocated quantity (or the ordered quantity) with your acknowledge sub-status, and the rest as back-ordered when back orders are enabled, with the dispatch and delivery dates if you chose to include them.

23.6 Inventory

This channel does not send stock. Virtual Stock stock files are produced by an **Inventory** channel (Operator Guide, section 11.5) set up with the Virtual Stock stock-file format, which Tilted configures for your retailer: the file is named with the date and time, sends zero for negative stock and gives back-in-stock dates as year-month-day.

23.7 Shipments and invoices

- Despatch confirmations send each despatched line with its part number, the carrier, the tracking number (the first one, if several were entered) and the tracking link, and the expected delivery date when dates are included.
- Booking confirmations send the booked delivery date with the booked (or deferred) sub-status.
- Invoices are sent with the retailer ID from **Retailers** and the customer's item codes.

23.8 Points to note

- Tick **Testing** while you trial the connection, and untick it before going live.
- Set up **Retailers** before the first invoice is sent.
- With FTP, files are only collected once Virtual Stock has written their completion (.DONE) marker.

24. Very

24.1 What it does

The Very channel handles Very drop-ship orders exchanged as XML files over FTP or SFTP. Channels:

- collects order files and turns the orders into stored orders and then Sage sales orders – orders that Very groups under one supplier order number become one Sage order;
- sends an order-accepted status, and a despatched status when you despatch;
- answers Very's cancellation requests;
- sends a stock status for each product – in stock, out of stock or available to pre-order.

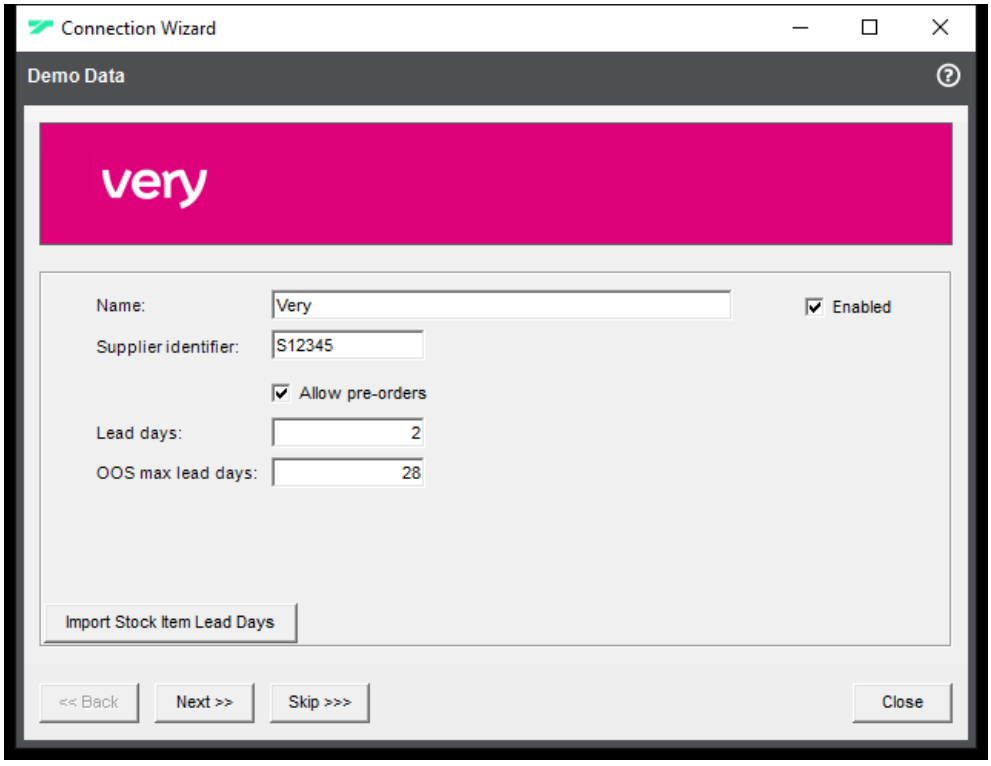
Very delivery labels are produced by the Very carrier in Tilted Carriers, not by this channel.

24.2 Setting it up

Add the FTP site Very gave you on **Settings** ▸ **FTP Sites** first (Operator Guide, section 3.2). Then on **Channels** ▸ **Channel List** click **Add** and choose **Very** (Operator Guide, section 4.2). The wizard has a **Connection** page and the **FTP** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The name of this channel. Required.
Enabled	Tick to let the channel run.
Supplier identifier:	Your Very supplier reference, sent on every status and stock file and put at the front of every file name uploaded to Very (see FTP page below). Required.
Allow pre-orders	Offer out-of-stock items as available to pre-order when you expect stock soon (section 24.6).
Lead days:	The lead time sent with in-stock items, also added to pre-order lead times. A stock item can have its own value (section 24.6).
OOS max lead days:	The longest wait, in days, that is still offered as a pre-order. A stock item can have its own value (section 24.6).
Import Stock Item Lead Days	Sets the stock item lead days from a csv file (section 24.6).



Very – connection page

FTP page

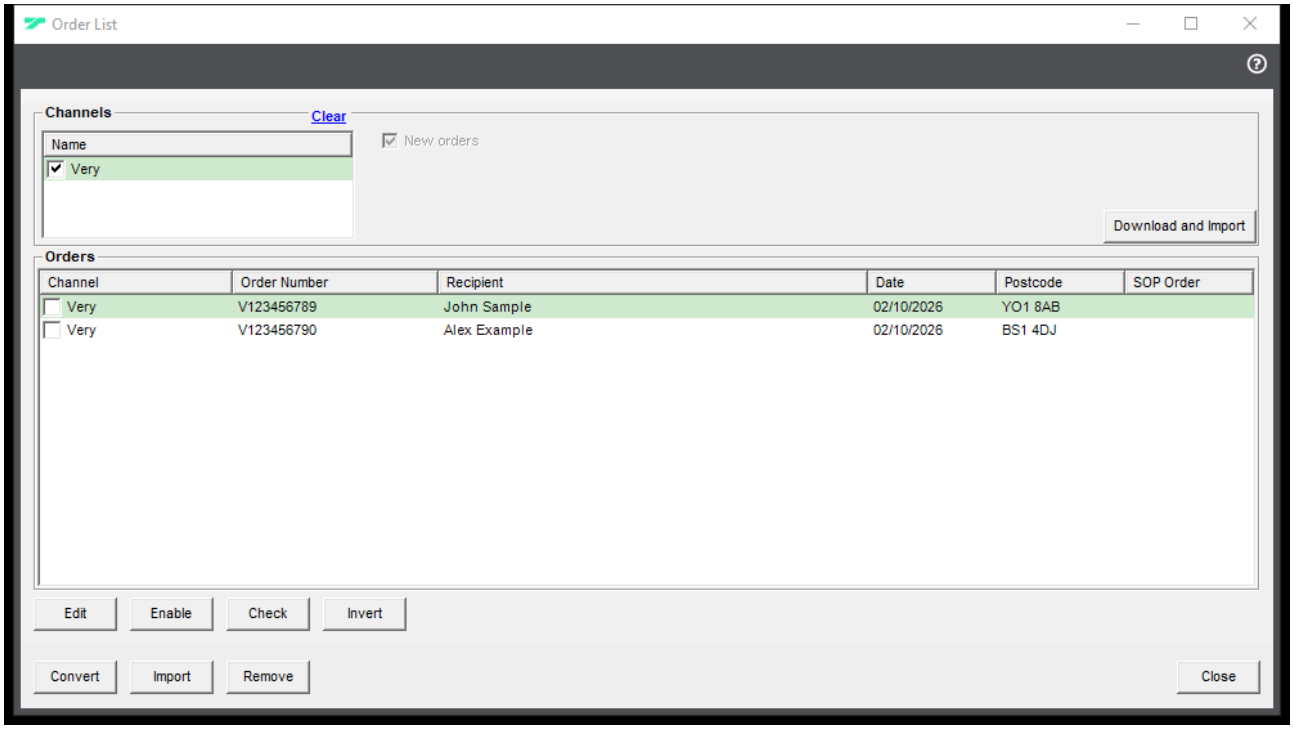
Tick **FTP Enabled**, choose the **Connection:** and check the folders (Operator Guide, section 4.8). They are filled in for Very: **Order:** "in", **Acknowledgement:**, **Shipment:** and **Invoice:** "st_upd_out", **Inventory listing:** "stockstatus". Cancellation requests are collected from Very's "st_upd_in" folder.

Every file uploaded to Very – acknowledgements, shipments, stock status and cancellation responses – is named with the **Supplier identifier**, an underscore and the export feed number, for example `S1234_0000140481.xml`. If the Supplier identifier is blank the file is named with the feed number only and a warning is written to the log. The copy kept in the channel's folder is still named with the feed number.

24.3 Screens

Channels ▸ **Very** has four entries: **Order List**, **Converted Order List**, **Shipment List** and **Inventory List** – the shared lists (Operator Guide, sections 6.2, 6.11, 13.3 and 11.6). What is particular to Very:

- **Order List** – the **Download and Import** button collects new order files from Very, imports them and archives them in the channel's folder. **Import** loads files you have saved yourself.
- **Converted Order List** – **Create Feed** creates one accepted status per order.
- **Shipment List** – **Create Feed** creates one despatched status per shipment.
- **Inventory List** – uses the current style of inventory list. **Refresh Inventory Items** builds the product list from your Very stock item aliases (Operator Guide, section 9.1).



Very – Order List

24.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Collects and imports new order files.
Process orders	Converts the stored orders into Sage sales orders (duplicates are removed unless the channel allows duplicate orders).
Download cancellation requests	Collects Very's cancellation request files.
Process cancellation requests	Cancels the requested lines in Sage where allowed and prepares the responses (section 24.5).
Upload cancellation responses	Sends the responses to Very.
Create acknowledgement feeds	Creates accepted statuses for converted orders.
Upload acknowledgement feeds	Sends them.
Create shipment feeds	Creates despatched statuses.
Upload shipment feeds	Sends them.
Create inventory Snapshot	Takes a stock snapshot – used for stock statuses and for the acceptance check (Operator Guide, section 11.3).
Refresh inventory items	Rebuilds the product list from stock item aliases.
Create delta inventory feed	Creates a stock status file for products whose status has changed.
Create full inventory feed	Creates a stock status file for all products.

Automation	What it does
Upload inventory feed	Sends the stock status files.
Clear Invoiced Delivery Details	Removes delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

24.5 Orders

- The default mappings use customer account **VERY**, Very's order number and date, the ship date as requested date and the delivery date as promised date, the deliver-to name and address, postcode, phone and e-mail, and the own product code and quantity for lines. Prices come from Sage. Change the mappings in **Field Mapping** (Operator Guide, section 5.3).
- Orders in the same file with the same supplier order number are merged into one Sage order; each line remembers its original Very order number.
- Accepting an order: if any stock line is not allocated, Channels checks the latest inventory snapshot. When no stock is due, or it is due after the order's requested delivery date, the accepted status is not sent – the export feed is set aside for you to confirm the order with Very yourself.
- Cancellation requests: a request is accepted when the order can still be cancelled (it has not been released or despatched) and the Sage line is cancelled; otherwise it is declined. Very receives an accepted or declined response per order (Operator Guide, section 6.13).

24.6 Inventory

Very receives a stock **status**, not a quantity: in stock (with your lead days) when there is free stock, otherwise out of stock – or, with **Allow pre-orders**, pre-order with a lead time when the next stock date is within **OOS max lead days:**. Delta files contain only products whose status has changed since it was last sent.

To use different lead days for one item, open the stock item, go to the **Channels** tab and choose **Very** (Operator Guide, section 16.8). A **Lead days:** or **OOS max lead days:** other than 0 there is used for that item in place of the channel's. Leave it at 0 to use the channel's value. Bundles always use the channel's values.

To set many items at once, click **Import Stock Item Lead Days** on the **Connection** page and choose a csv file with the columns **ItemCode**, **LeadDays** and **OOSMaxLeadDays** (a header row is needed; a blank value counts as 0). Tick **Clear existing values** to set every item that is not in the file back to 0 0, so the stock items match the file exactly; leave it unticked to change only the items in the file. The whole file is checked first – an unknown item code, a duplicate or a value that is not a whole number of days is listed and nothing is changed. Otherwise you are told how many items will be updated and cleared and asked to confirm.

24.7 Shipments

A despatched status is sent for each shipment. Tracking is not sent – Very tracks its own labels. Invoices are not sent through this channel.

24.8 Points to note

- Take stock snapshots regularly – both the stock statuses and the acceptance check use them.

25. Wayfair

25.1 What it does

The Wayfair channel connects to the Wayfair supplier API. Each channel works in one of two ways:

- **Drop ship** – downloads Wayfair drop-ship purchase orders as stored orders, turns them into Sage sales orders, accepts them, sends ship notices with tracking, sends stock levels and can answer Wayfair's cancellation requests.
- **Castlegate** – for stock you send into Wayfair's Castlegate warehouses: downloads Castlegate purchase orders and acknowledges them; when Wayfair reports the shipment, the matching Sage order is despatched and Wayfair's shipping advice is acknowledged.

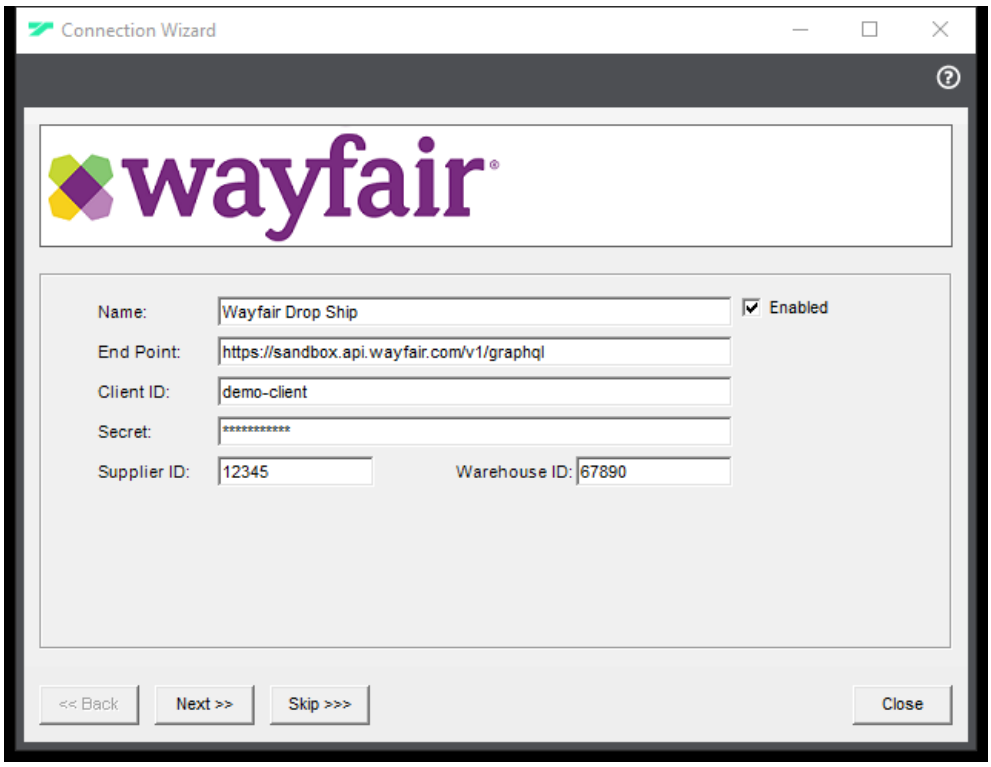
Use a separate channel for each.

25.2 Setting it up

You need API credentials from the Wayfair partner portal, your supplier ID and your Wayfair warehouse ID. On **Channels** ▸ **Channel List** click **Add** and choose **Wayfair** (Operator Guide, section 4.2). The wizard has three Wayfair pages – **Connection**, **Options** and **Cancellations** – followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

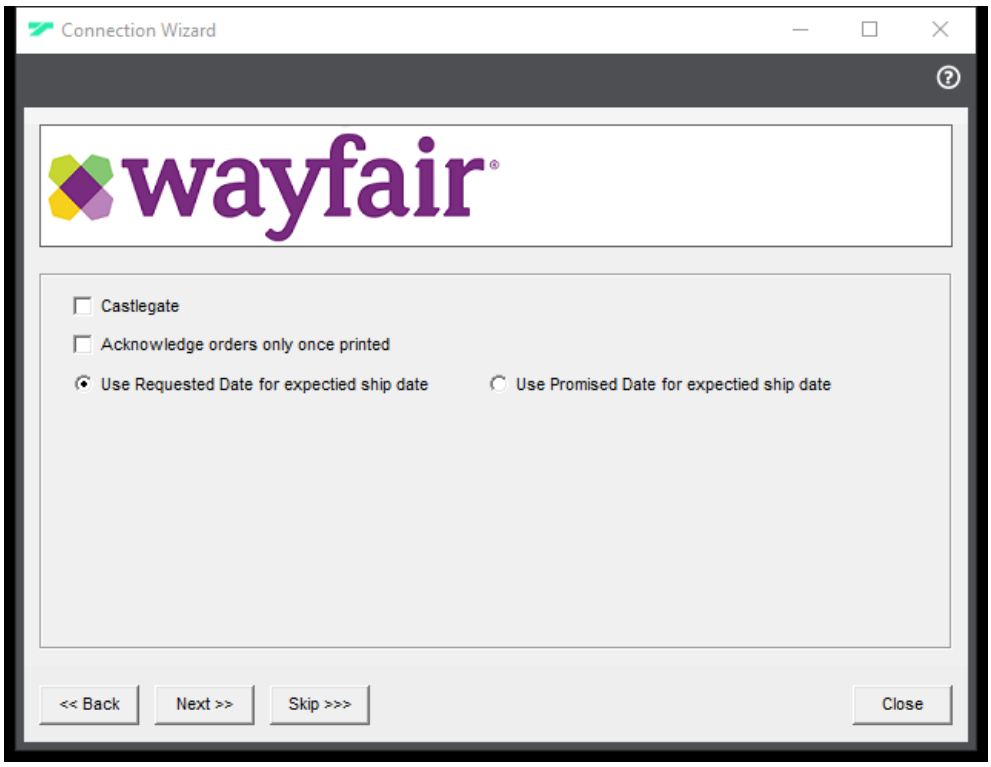
Field	What it does
Name:	The name of this channel. Required.
Enabled	Tick to let the channel run.
End Point:	The Wayfair API address, filled in for live. Use Wayfair's sandbox address while testing.
Client ID:	Your Wayfair API client ID. Required.
Secret:	Its secret. Required.
Supplier ID:	Your Wayfair supplier ID. Required.
Warehouse ID:	Your Wayfair warehouse ID, a number. Required. It identifies you on stock updates, ship notices and cancellation requests.



Wayfair – connection page

Options page

Field	What it does
Castlegate	Tick for a Castlegate channel.
Acknowledge orders only once printed	Drop ship: accept orders only after the Sage order has been printed.
Use Requested Date for expected ship date	The ship date sent when accepting is the Sage order's requested delivery date (the default).
Use Promised Date for expected ship date	The ship date sent is the promised delivery date.



Wayfair – options page

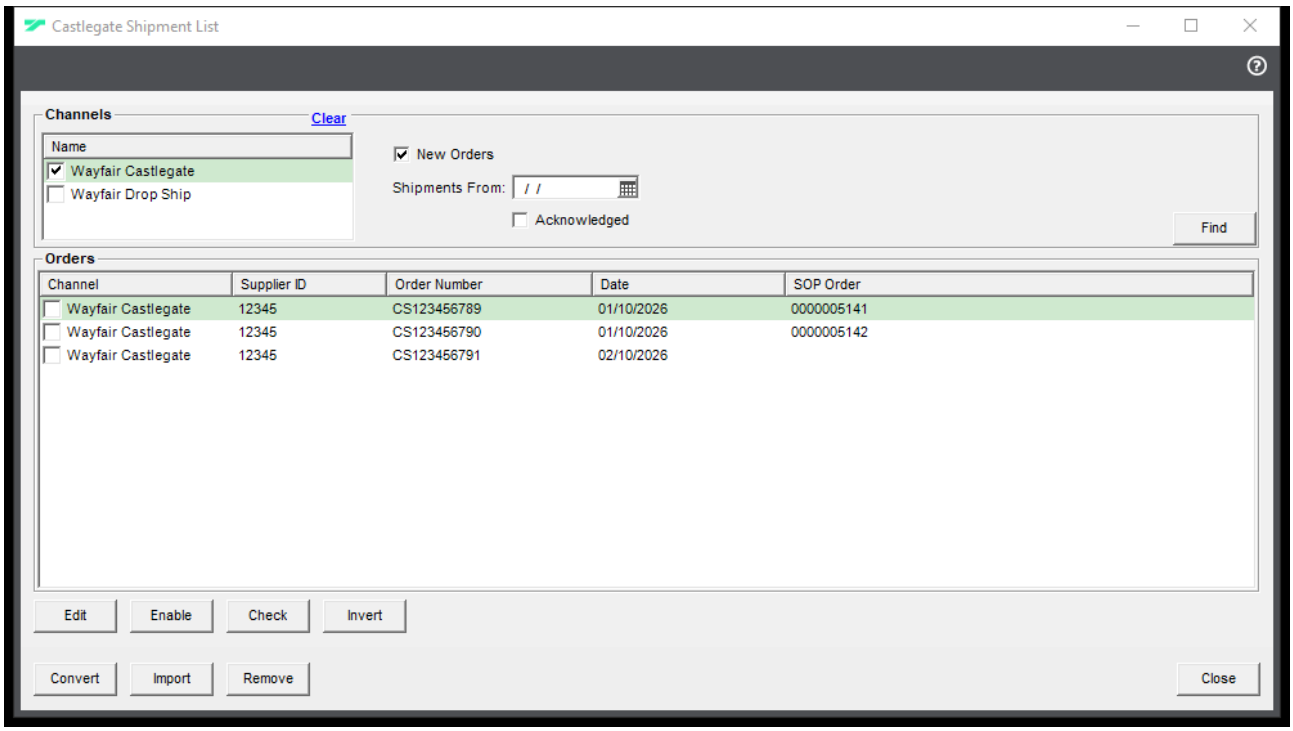
Cancellations page

Field	What it does
Cancellations Enabled	Tick to answer Wayfair cancellation requests (drop ship only).
Client ID:	The client ID for Wayfair's supplier order API. Required when cancellations are enabled.
Secret:	Its secret. Required when cancellations are enabled.
Sandbox	Use Wayfair's sandbox for cancellations.

25.3 Screens

Channels ▸ Wayfair has five entries: **Order List**, **Converted Order List**, **Shipment List**, **Castlegate Shipment List** and **Inventory List**. The lists other than **Castlegate Shipment List** are the shared lists (Operator Guide, sections 6.2, 6.11, 13.3 and 11.6). What is particular to Wayfair:

- **Order List** – tick **New Orders** and click **Find** to download purchase orders not yet answered since the last download, or enter **Orders From:** a date (tick **Acknowledged** to include orders you have already accepted).
- **Converted Order List** – **Newly converted orders** respects **Acknowledge orders only once printed**; all channels ticked together must use the same setting. **Create Feed** creates acceptances.
- **Shipment List** – **Create Feed** creates ship notices.
- **Castlegate Shipment List** – Castlegate channels are ticked for you. Columns **Supplier ID**, **Order Number**, **Date** and **SOP Order**. Tick **New Shipments** for new shipments, or enter **Shipments From:** a date (tick **Acknowledged** to include shipments already acknowledged), and click **Find**; **Convert** despatches the Sage orders and acknowledges the shipments to Wayfair.
- **Inventory List** – drop-ship channels only, one at a time. **Refresh Inventory Items** builds the product list from your Wayfair stock item aliases (Operator Guide, section 9.1).



Wayfair – Castlegate Shipment List

25.4 Automations

Add these to a job bag (Operator Guide, section 15.4). Keep drop-ship and Castlegate channels in separate job bags.

Automation	What it does
Download new orders	Downloads new drop-ship (or Castlegate) purchase orders.
Process orders	Converts the stored orders into Sage sales orders; orders already in Sage are removed from the list.
Create acknowledgement feeds	Creates acceptances (or Castlegate acknowledgements).
Upload acknowledgement feeds	Sends them.
Generate Tracking URLs	Builds tracking links (Operator Guide, section 13.4).
Create shipment feeds	Creates ship notices for despatches.
Upload shipment feeds	Sends them.
Download inventory items	Rebuilds the product list from stock item aliases.
Create inventory Snapshot	Takes a stock snapshot (Operator Guide, section 11.3).
Create delta drop ship inventory feed	Creates a stock export feed for items whose stock has moved (drop ship only).
Create full drop ship inventory feed	Creates a stock export feed checking every item (drop ship only).
Upload drop ship inventory feed	Sends the stock export feeds.
Clear Invoiced Delivery Details	Removes delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).
Download new Castlegate shipments	Downloads Castlegate shipments Wayfair has not yet had acknowledged.
Process Castlegate shipments	Despatches the matching Sage orders and acknowledges the shipments. A shipment whose order is not in Sage is removed with a message in the log.
Process cancellation requests	Answers Wayfair cancellation requests awaiting your confirmation (section 25.5).

25.5 Orders

- The default mappings use customer account **WAY001**, the purchase order number and date, the estimated ship date as requested date, the ship-to name, address, postcode, country and phone, and

the part number, quantity and unit price for lines. The carrier and ship speed Wayfair chose are kept with the order. Change the mappings in **Field Mapping** (Operator Guide, section 5.3).

- Accepting a drop-ship order sends each line with its quantity and price, the ship speed and the expected ship date (requested or promised date, as set on the Options page).
- Cancellation requests: the cancellation is offered to the Sage order; if it can be cancelled Wayfair is told it is confirmed and the line is cancelled in Sage, otherwise the request is rejected with the reason (Operator Guide, section 6.13).

25.6 Inventory

For each product Wayfair receives the free stock on hand, the quantity on order and its next available date, and whether the item is discontinued. Before sending, Channels reads Wayfair's current figures and leaves out products that already match.

25.7 Shipments

A ship notice is sent for each despatch with the purchase order number, the carrier and ship speed, the tracking number, the despatch date, your company address as the ship-from address, the delivery address, and the package count, weight and volume. Castlegate shipments are reported by Wayfair and recorded as despatches in Sage. Invoices are not sent.

25.8 Points to note

- Keep drop-ship and Castlegate on separate channels and separate job bags.
- Cancellation requests need their own API credentials.

26. Dunelm

26.1 What it does

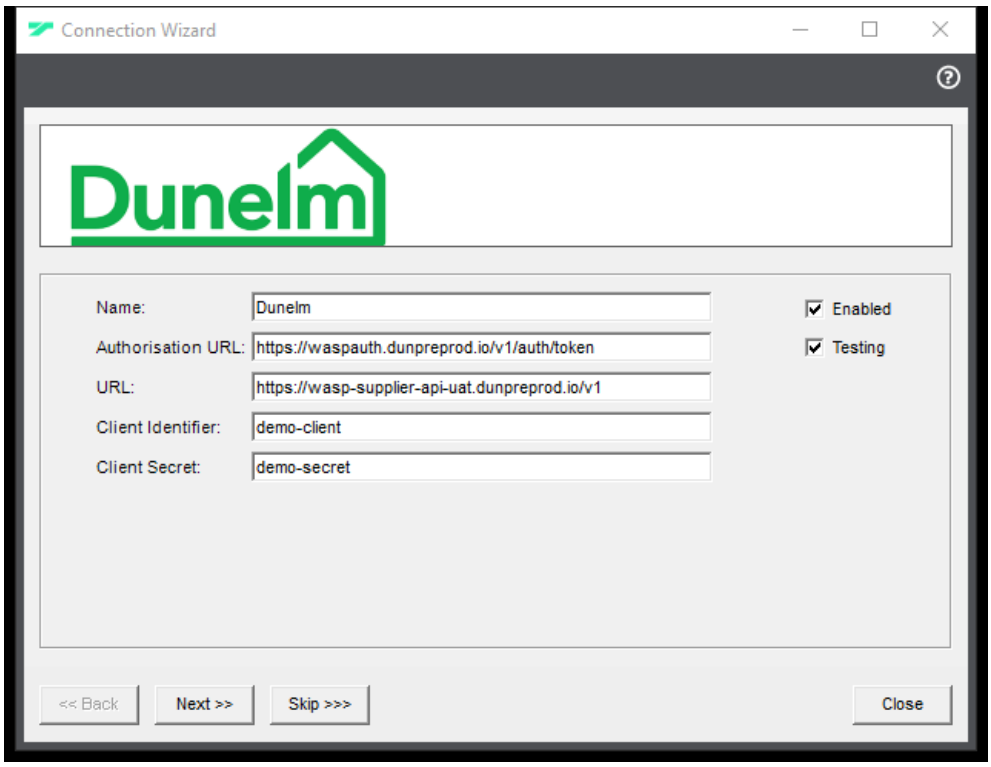
The Dunelm channel handles Dunelm drop-ship orders through Dunelm's supplier API. Channels downloads new purchase orders as stored orders and turns them into Sage sales orders, then moves each Dunelm order line through its statuses: **acknowledged** when you accept the order, **ready for dispatch** when you despatch it and **dispatched** when you invoice it.

26.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Dunelm** (Operator Guide, section 4.2). The wizard has one **Connection** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

Field	What it does
Name:	The name of this channel. Required.
Enabled	Tick to let the channel run.
Testing	Ticked, the channel uses Dunelm's pre-production system; unticking switches both addresses to live. Ticked for a new channel.
Authorisation URL:	Dunelm's sign-in address, set by **Testing**.
URL:	Dunelm's supplier API address, set by **Testing**.
Client Identifier:	The client ID Dunelm issued to you.
Client Secret:	The client secret Dunelm issued to you.

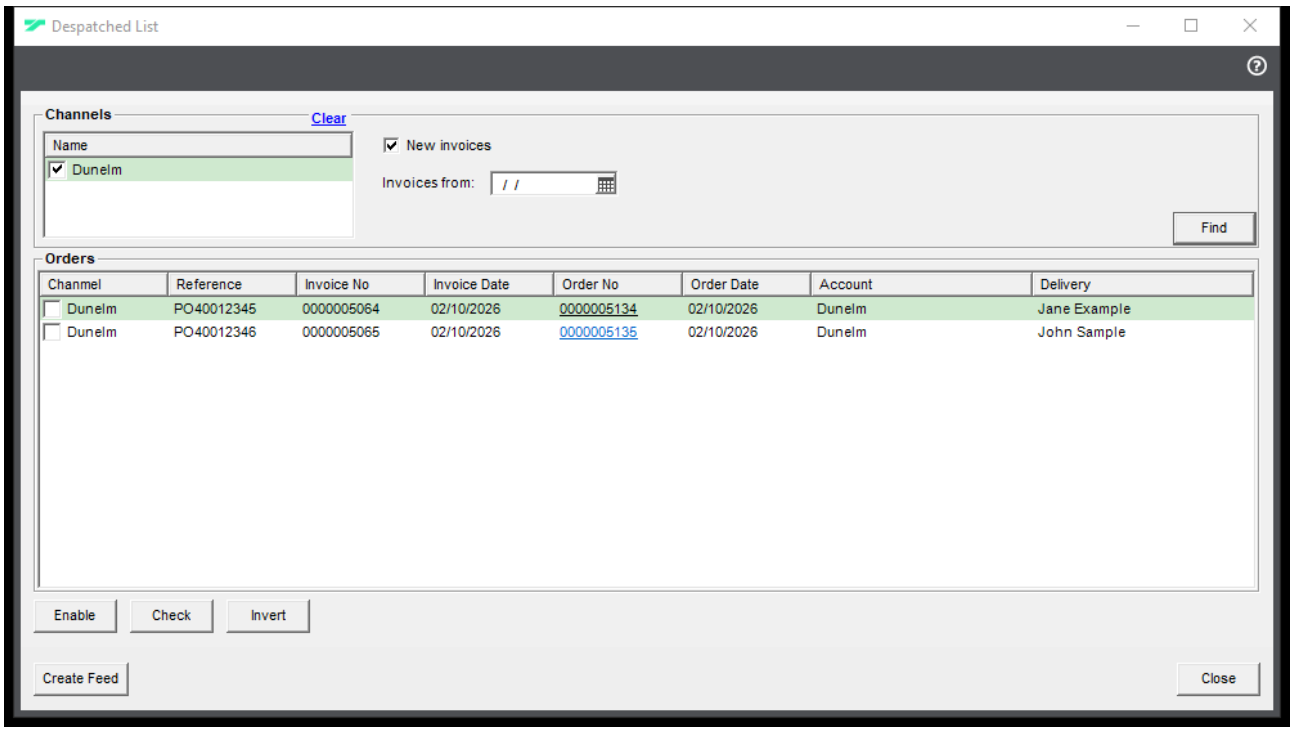


Dunelm – connection page

26.3 Screens

Channels ▸ **Dunelm** has four entries: **Order List**, **Converted Order List**, **Shipment List** and **Delivery List Form** – the shared lists (Operator Guide, sections 6.2, 6.11, 13.3 and 13.5). What is particular to Dunelm:

- **Order List** – tick **New orders** and click **Find** to download new Dunelm purchase orders.
- **Converted Order List** – **Create Feed** creates one acknowledgement per order.
- **Shipment List** – **Create Feed** creates one ready-for-dispatch update per despatch.
- **Delivery List Form** (window title **Despatched List**) – invoices of Dunelm orders not yet reported; **Create Feed** creates one dispatched update per invoice.



Dunelm – Despatched List

26.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads new purchase orders.
Process orders	Converts the stored orders into Sage sales orders; orders already in Sage are removed from the list.
Create acknowledgement feeds	Creates acknowledgements for converted orders.
Upload acknowledgement feeds	Sets the order lines to acknowledged in Dunelm.
Create shipment feeds	Creates updates for despatches.
Upload shipment feeds	Sets the despatched lines to ready for dispatch.
Create delivered feeds	Creates updates for invoiced orders.
Upload delivered feeds	Sets the invoiced lines to dispatched.
Clear Invoiced Delivery Details	Removes delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

26.5 Orders

- The default mappings use customer account **DUNELM**, the purchase order number and date, the recipient's name, address, city, postcode, phone and e-mail, and the supplier article number, quantity and unit cost for lines. Change them in **Field Mapping** (Operator Guide, section 5.3).
- Each line keeps Dunelm's line reference; every status update identifies the line by it.
- Accepting an order: if any stock line is not allocated, Channels checks the latest inventory snapshot. When no stock is due, or it is due after the order's requested delivery date, the acknowledgement is not sent – the export feed is set aside so you can confirm the order with Dunelm yourself.

26.6 Inventory

Dunelm does not take stock feeds from this channel. Take inventory snapshots regularly all the same – the acceptance check uses them (Operator Guide, section 11.3).

26.7 Shipments and invoices

Despatching an order sets the despatched lines to ready for dispatch; invoicing it sets the invoiced lines to dispatched. Tracking numbers are not sent.

26.8 Points to note

- Untick **Testing** only when Dunelm has given you live credentials.
- Each update is sent per order, despatch or invoice, so one failure does not hold up the others; check **Channels** ▸ **Export Feeds** (Operator Guide, section 14.3) for errors.

27. The Range

27.1 What it does

The Range channel handles The Range (CDS) direct home delivery (DHD) orders through The Range's supplier portal. Channels:

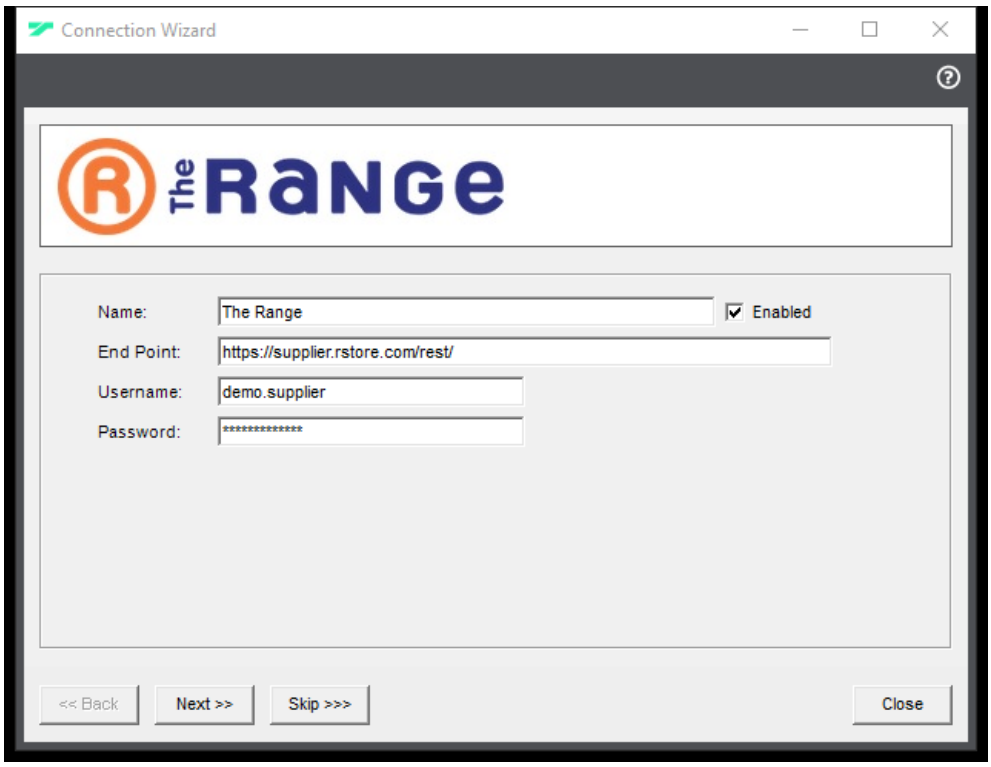
- downloads unacknowledged DHD orders as stored orders and turns them into Sage sales orders;
- acknowledges them;
- sends a despatch event for each shipment with the courier, tracking reference, delivery service and the earliest and latest delivery dates, worked out from your courier;
- sends stock quantities for the products you sell to The Range.

27.2 Setting it up

Make sure the courier analysis code is chosen on **Settings** ▸ **General** (Operator Guide, section 3.1). Then on **Channels** ▸ **Channel List** click **Add** and choose **The Range DHD** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **Options** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).

Connection page

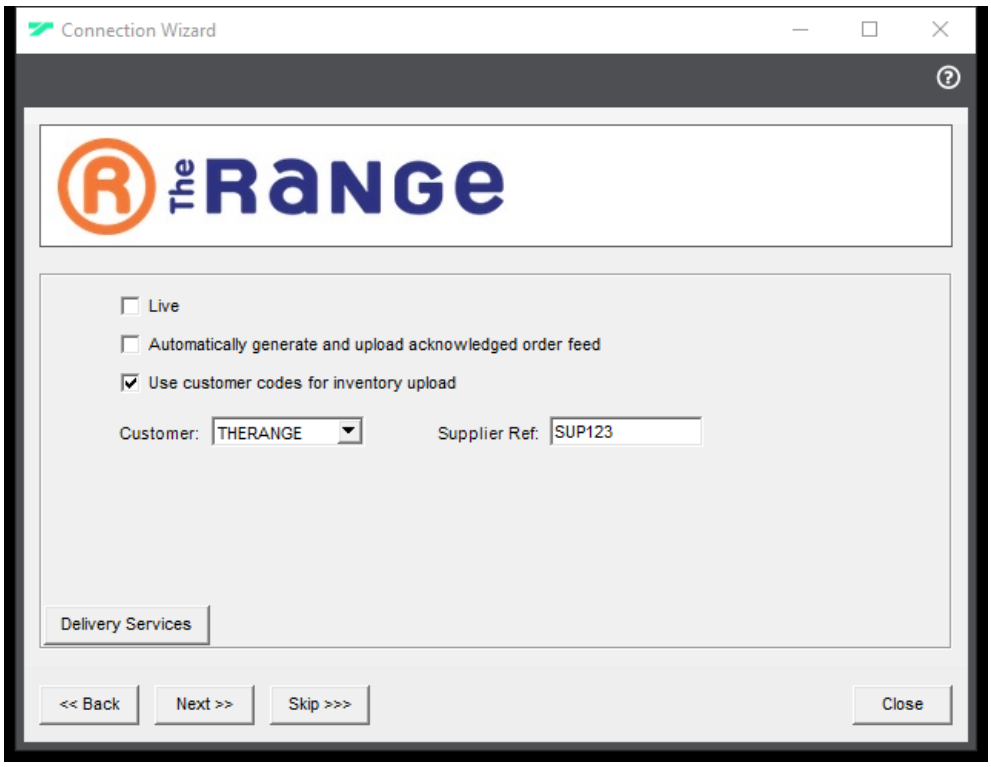
Field	What it does
Name:	The name of this channel. Required.
Enabled	Tick to let the channel run.
End Point:	The supplier portal address, filled in for you. Required.
Username:	Your supplier portal username. Required.
Password:	Your supplier portal password.



The Range – connection page

Options page

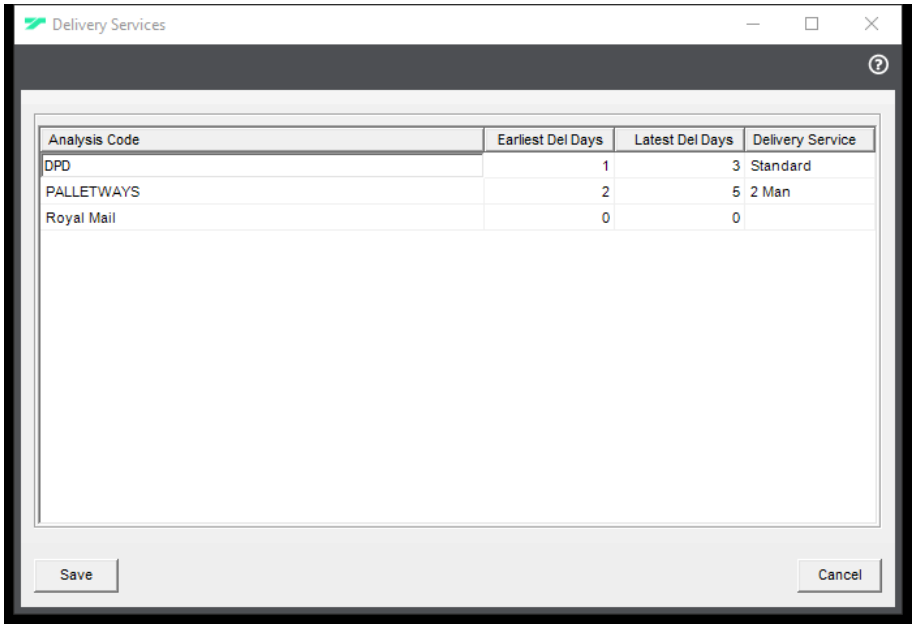
Field	What it does
Live	Send acknowledgements, despatches and stock as live. Leave unticked while testing.
Automatically generate and upload acknowledged order feed	When ticked, the acknowledgement automations acknowledge newly converted orders to The Range automatically. When clear, acknowledge them yourself with **Create Feed** on the **Converted Order List**.
Customer:	The Sage customer for The Range orders. It becomes the default customer account mapping (otherwise **THERANGE**) and its customer item codes are the products sent in stock feeds.
Supplier Ref:	Your supplier reference at The Range, kept with each order.
Use customer codes for inventory upload	Send The Range's item codes (the customer item codes) instead of your Sage codes on stock and despatch updates.
Delivery Services	Opens **Delivery Services** (below).



The Range – options page

Delivery Services

One row appears for each value of your courier analysis code. For each courier enter the **Earliest Del Days** and **Latest Del Days** after despatch and The Range's **Delivery Service** name, then click **Save**. Rows left without a delivery service are removed when you save.



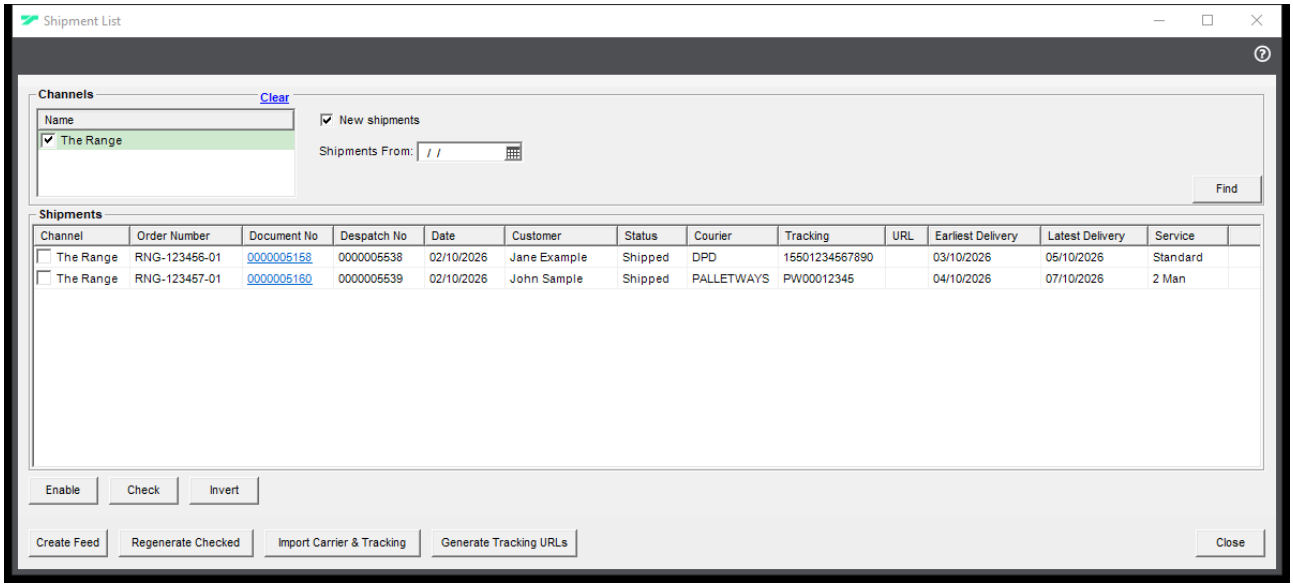
The Range – delivery services

27.3 Screens

Channels ▸ The Range has four entries: **Order List**, **Converted Order List**, **Shipment List** and **Inventory List** – the shared lists (Operator Guide, sections 6.2, 6.11, 13.3 and 11.6). What is particular to The Range:

- **Order List** – **Unacknowledged** downloads orders from the last seven days not yet acknowledged; **Orders From:** downloads all orders from a date; **Specific Order:** downloads one order. Click **Find**.

- **Converted Order List** – **Create Feed** creates acknowledgements.
- **Shipment List** – adds the columns **Earliest Delivery**, **Latest Delivery** and **Service**, filled in from **Delivery Services** for the order's courier. A shipment can be ticked only when these are filled in as well as the carrier and tracking.
- **Inventory List** – uses the current style of inventory list. **Refresh Inventory Items** builds the product list from the customer's item codes.



The Range – Shipment List

27.4 Automations

Add these to a job bag (Operator Guide, section 15.4).

Automation	What it does
Download new orders	Downloads unacknowledged orders from the last seven days.
Process orders	Converts the stored orders into Sage sales orders.
Create acknowledgement feeds	Creates acknowledgements for converted orders (when **Automatically generate and upload acknowledged order feed** is ticked).
Upload acknowledgement feeds	Acknowledges the orders to The Range.
Generate Tracking URLs	Builds tracking links (Operator Guide, section 13.4).
Create shipment feeds	Creates one despatch event per shipment that has its carrier, tracking and delivery service details.
Upload shipment feeds	Sends them.
Download inventory items	Rebuilds the product list from the customer's item codes.
Create delta inventory feed	Creates a stock export feed for items whose stock has moved. Skipped while inventory feeds are paused (Operator Guide, section 11.2).
Create full inventory feed	Creates a stock export feed for all items. Skipped while inventory feeds are paused.
Upload inventory feed	Sends the stock export feeds.
Clear Invoiced Delivery Details	Removes delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

27.5 Orders

- The default mappings use the customer from the Options page (or **THERANGE**), The Range's order number as the customer document number, the customer's name (with organisation), building and street, city, county, postcode, phone and e-mail, and the product code, title and quantity for lines. Prices come from Sage. Change the mappings in **Field Mapping** (Operator Guide, section 5.3).

- Lines The Range has cancelled are not downloaded; a postcode without a space has one added before the last three characters.
- The acknowledgement tells The Range the order has been received.

27.6 Inventory

Each product is sent with its free-stock quantity, identified by The Range's item code or your Sage code (**Use customer codes for inventory upload**).

27.7 Shipments

Each despatch event carries the order number, the delivery service, the courier, the despatch date, the earliest and latest delivery dates (despatch date plus the days set in **Delivery Services** – dates already past are moved forward), the tracking reference and the despatched items. Invoices are not sent.

27.8 Points to note

- Keep **Delivery Services** complete for every courier you use for The Range – shipments without a delivery service are not sent.
- Tick **Live** only when The Range has confirmed your test orders.
- Orders not acknowledged within seven days drop out of the **Unacknowledged** search; use **Orders From:** to fetch them.

28. EDI

28.1 What it does

The EDI channel exchanges electronic business documents with retailers, buying groups and other trading partners in the **EDIFACT** (including EANCOM), **X12** and **TRADACOMS** standards. Purchase orders sent by your trading partners become stored orders and then Sage 200 sales orders; acknowledgements, despatch advices (ASNs), invoices, credit notes and stock (inventory) advices are produced from Sage and sent back.

An EDI channel represents one mailbox: one sender identity (your GLN, or your X12 interchange ID) and one FTP connection – usually your VAN mailbox or the retailer's FTP/SFTP server. Inside the channel you add one record per trading partner, called an **EDI customer**. An EDI customer is either a single Sage customer account or a buying group (every Sage customer account that carries a chosen analysis code value).

The EDI channel:

- downloads files from the mailbox, recognises the standard of each file and imports the orders and order changes it contains;
- matches each order to an EDI customer by the sender's identifier and to a Sage delivery address by the delivery point GLN;
- converts the orders to Sage sales orders through the shared order process (Operator Guide, section 6);
- sends a 997 functional acknowledgement for every X12 order file, when the partner asks for one;
- produces each outbound document in the exact layout that trading partner requires, using the document format (**Class:**) chosen for the partner;

- for partners whose orders you key into Sage yourself – for example the members of a buying group – picks up the despatches and invoices from Sage so that they can still be sent by EDI.

> Each trading partner publishes its own specification for the documents it sends and receives. Channels includes ready-made document formats for many retailers and buying groups in EDIFACT, X12 and TRADACOMS, plus standard EANCOM invoice and X12 inventory formats. Your Tilted consultant chooses the right format for each partner during onboarding, or supplies one in your bespoke extension if the partner needs something new.

Standards and documents

Standard	Received from partners	Sent to partners
EDIFACT / EANCOM (D96A)	ORDERS purchase orders; ORDCHG order changes; DESADV despatch advices against an existing order (specific trading-partner set-ups only)	ORDRSP order responses, DESADV despatch advices, INVOIC invoices (with TAXCON where the partner requires it), credit notes and INVRPT inventory reports – each in the partner's format. A standard EANCOM INVOIC format is included.
X12 (004010, 004030 or 005010 as each partner requires)	850 purchase orders; 860 purchase order changes; 997 functional acknowledgements; 864 text messages	997 functional acknowledgements (automatic); 855 purchase order acknowledgements; 865 change acknowledgements; 856 ship notices (ASNs); 810 invoices; 846 inventory advices; 870 order status where required – each in the partner's format. A standard 846 format is included.
TRADACOMS	ORDERS order files	INVOIC invoice files, in the partner's format.

Channels recognises the standard of each incoming file from its first characters (**UNA** or **UNB** for EDIFACT, **STX** for TRADACOMS, **ISA** for X12). A file may contain any number of orders.

Every outbound interchange carries your channel **GLN:** and **Qualifier:** as the sender and the trading partner's **Route GLN:** and **Agency:** as the receiver. Separators, syntax versions and segment layouts are fixed by each document format to match the partner's specification, so there are no delimiter or version settings to maintain. The **Testing** box on each document tab of the EDI customer marks that document's interchanges as test messages (the X12 usage indicator T, or the EDIFACT test indicator); untick it when the partner moves you to live.

Each document type has its own control number sequence per trading partner, shown as **Next batch number:** on the document tab. Channels takes the number for each file it produces and moves the sequence on. X12 997 functional acknowledgements use the acknowledgement sequence.

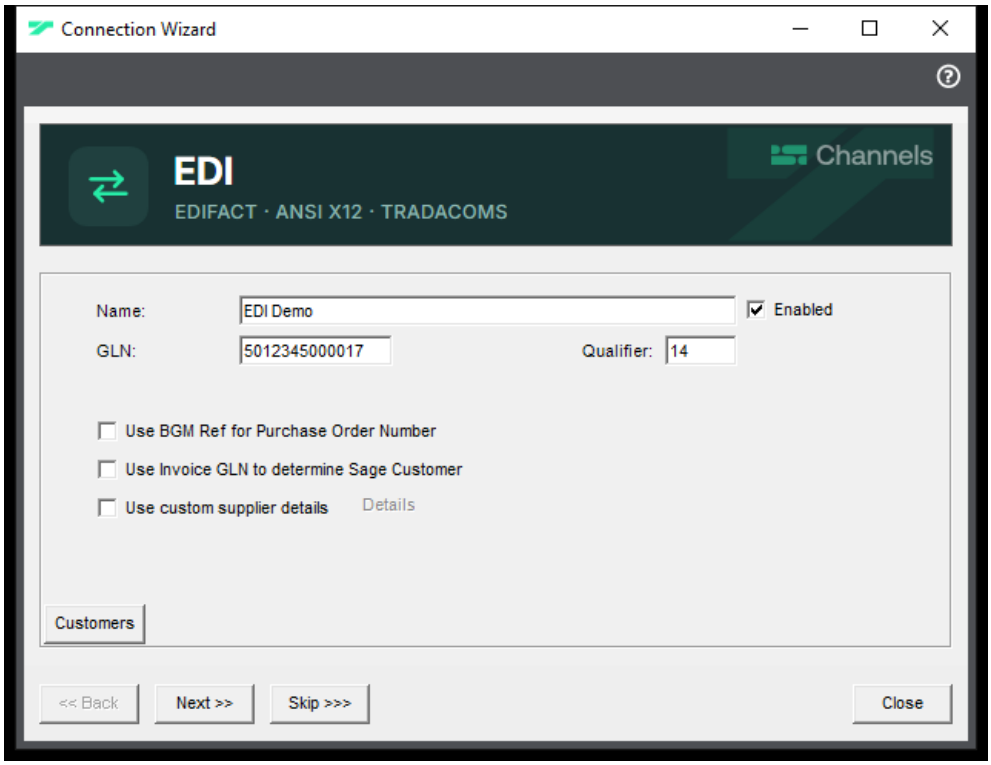
28.2 Setting it up

Set up in this order:

1. On **Settings** ▸ **FTP Sites**, add the FTP site for your VAN or trading-partner mailbox (Operator Guide, section 3.2). Skip this if your VAN software runs on your own server (section 28.8).
2. On **Channels** ▸ **Channel List** click **Add** and choose **EDI** (Operator Guide, section 4.2). The wizard has a **Connection** page and an **FTP** page, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5).
3. On the **Connection** page, click **Customers** and add one EDI customer for each trading partner on this mailbox.
4. For each EDI customer, complete the document tabs, choose the document format for each document you exchange, and set up **Locations** (delivery points) and **Carriers** (carrier codes).

5. Check the field mappings. Channels creates the default EDI mappings when the channel is added (section 28.5 and Operator Guide, section 5.3).
6. Add the EDI automations to a job bag (section 28.4 and Operator Guide, section 15.4).

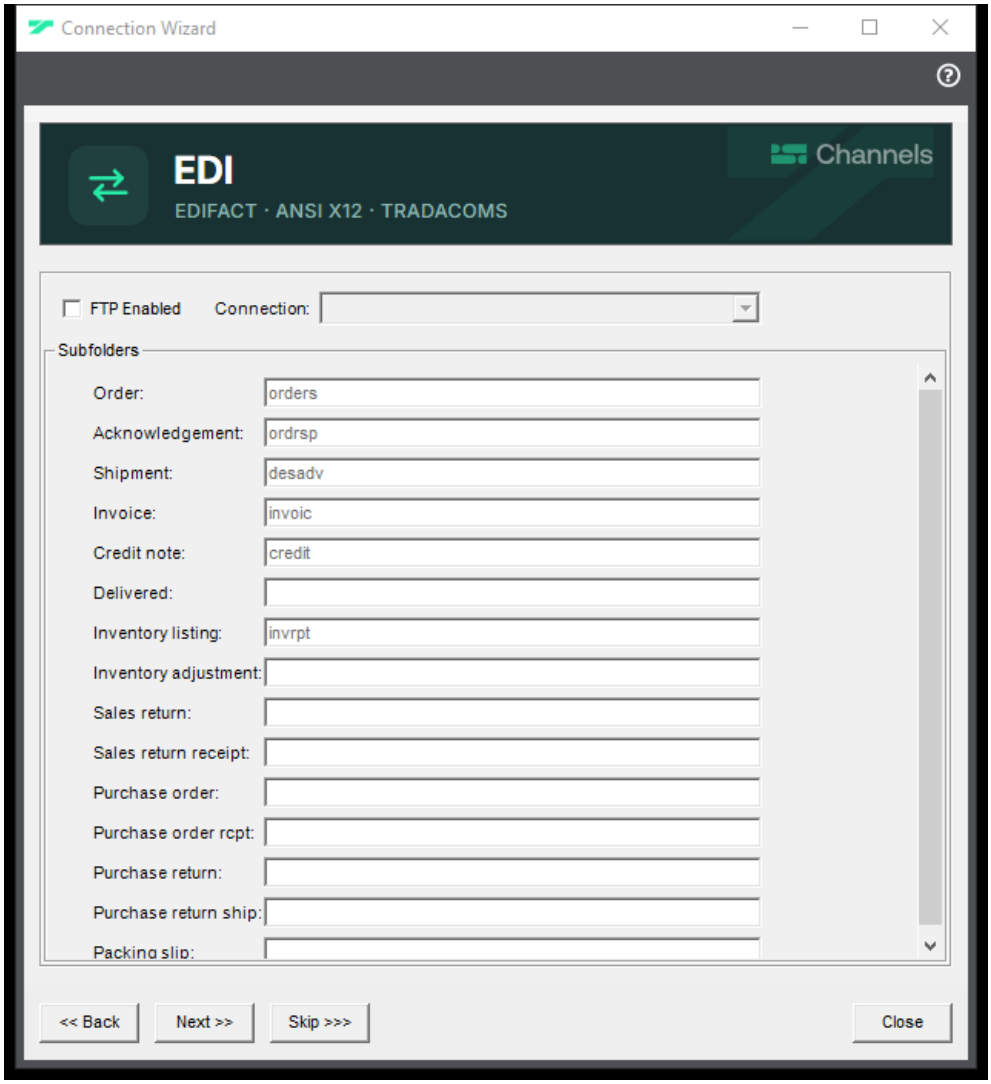
Connection page



EDI – connection page

Field	What it does
Name:	The channel name. It is also the name of the channel's working folder under the Channels root folder (section 28.8). Required.
Enabled	Switches the channel on. Automations do nothing for a channel that is not enabled.
GLN:	Your identity with your trading partners: the EDIFACT interchange sender and supplier GLN, or your X12 interchange sender ID. Required. For example `5012345000017`.
Qualifier:	The code qualifier that goes with your GLN – for example `14` for an EANCOM GLN, or `ZZ`, `01` or `12` for an X12 interchange ID, as agreed with your VAN.
Use BGM Ref for Purchase Order Number	EDIFACT only. Uses the document number in the BGM segment as the purchase order number. When unticked, Channels uses the order number reference (RFF+ON), then the customer reference, then the document number.
Use Invoice GLN to determine Sage Customer	Matches incoming orders to EDI customers by the invoice party GLN in the order (the EDI customer's **Invoice GLN:**) instead of by the sender of the file (the **Route GLN:**). Use it when several of your partners' orders arrive from the same sender – for example a buying group's central hub.
Use custom supplier details	Sends a separate set of supplier details (your supplier GLN, name, address and VAT number) on EDIFACT documents instead of your Sage company details. When ticked, the **Details** link opens **Supplier Details**.
Customers	Opens **Customers / Analysis Codes**, the list of trading partners on this channel.

FTP page



EDI – FTP page

The shared FTP page (Operator Guide, section 4.8). For EDI:

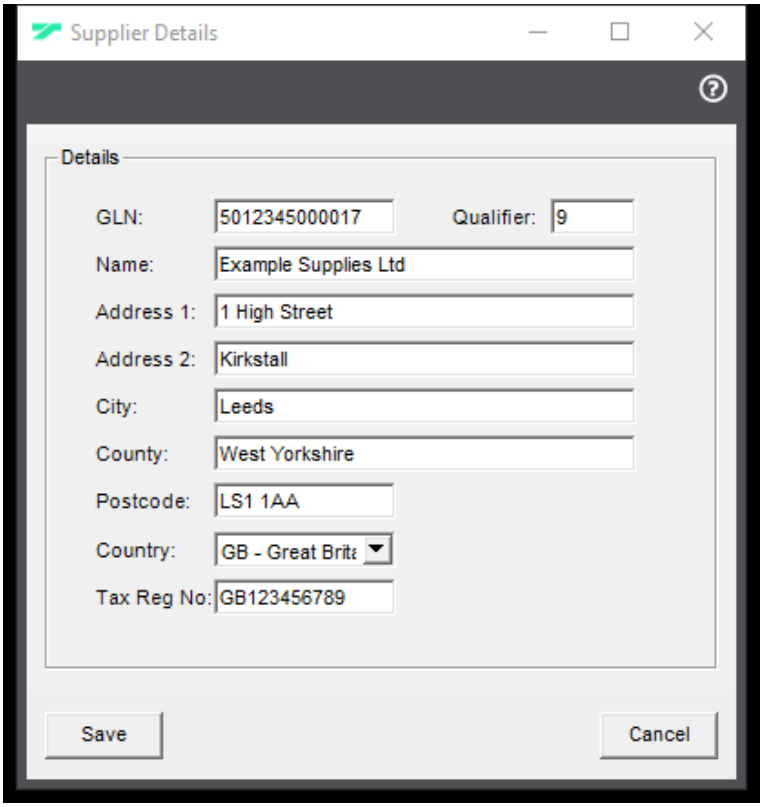
Field	What it does
FTP Enabled	Tick to download and upload through the FTP site. Untick when files are exchanged through local folders only.
Connection:	The FTP site (from **Settings** ▸ **FTP Sites**) for this mailbox. Required when **FTP Enabled** is ticked – "You need to select an ftp connection".
Order:	Sub folder (under the site's incoming folder) that incoming files are downloaded from.
Acknowledgement:	Sub folder (under the site's outgoing folder) for order acknowledgements, change acknowledgements and 997 functional acknowledgements.
Shipment:	Sub folder for despatch advices / ship notices.
Invoice:	Sub folder for invoices.
Credit note:	Sub folder for credit notes.
Inventory listing:	Sub folder for inventory advices.

The other sub folder boxes on this page (**Delivered:**, **Inventory adjustment:**, **Sales return:**, **Purchase order:** and so on) are used by Third Party Logistics channels, not by EDI.

> **Important:** When **FTP Enabled** is ticked, each file is deleted from the server's **Order:** folder as soon as it has been downloaded. Channels keeps the original in the channel's **Archive** folder (section 28.8).

Supplier Details

Opened from the **Details** link on the Connection page when **Use custom supplier details** is ticked.

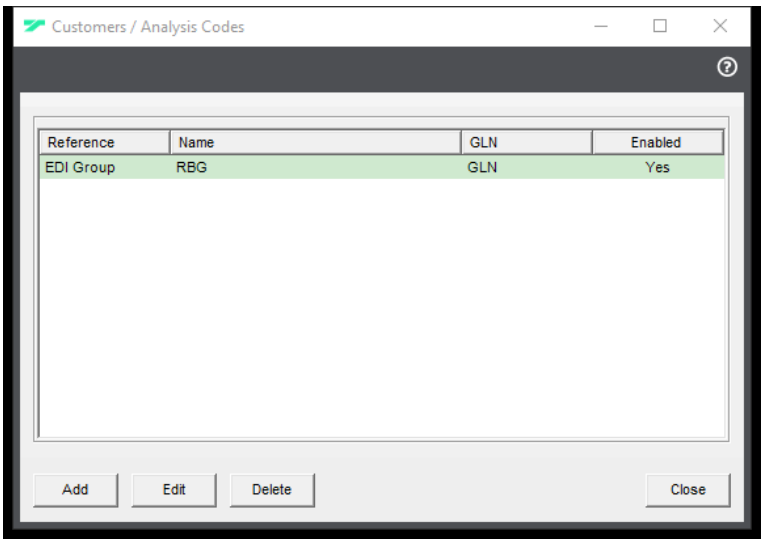


EDI – Supplier Details

Field	What it does
GLN: / Qualifier:	The supplier party identifier and its code qualifier (for example `5012345000017` and `9`).
Name:, **Address 1:**, **Address 2:**, **City:**, **County:**, **Postcode:**, **Country:**	The supplier name and address sent on EDIFACT documents.
Tax Reg No:	The VAT number sent as the supplier's tax registration.
Save / Cancel	Saves or discards the details.

Customers / Analysis Codes

The list of trading partners on the channel. Opened from the **Customers** button on the Connection page.



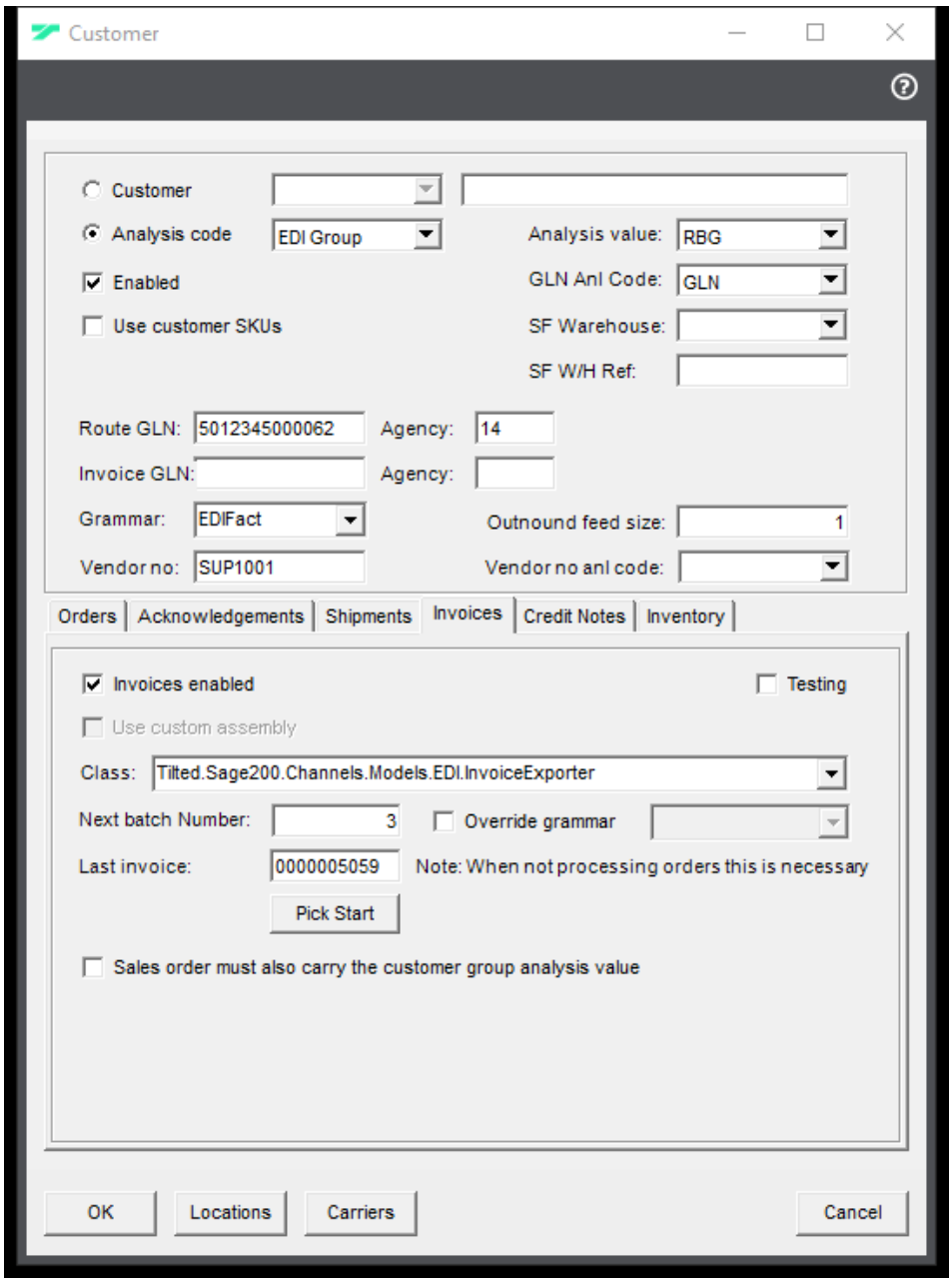
EDI – Customers / Analysis Codes

Column	What it shows
Reference	The Sage customer account, or for a buying group the name of the analysis code.
Name	The customer name, or for a buying group the analysis code value.
GLN	The partner's **Route GLN:** (or **Invoice GLN:** when the channel matches by invoice GLN); for a buying group, the analysis code that holds members' GLNs.
Enabled	Whether the trading partner is enabled.

Button	What it does
Add / **Edit**	Opens the **Customer** window for a new or the selected partner (double-click also edits).
Delete	Deletes the selected trading partner and its locations after confirmation.
Close	Closes the list.

Customer – the trading partner

The **Customer** window holds everything about one trading partner: who it is, how it is identified on the EDI network and, on six tabs, which documents you exchange and in which format. Buttons **Locations** and **Carriers** open the partner's delivery points and carrier codes; **OK** saves and **Cancel** discards.



EDI – Customer, set up as a buying group (Invoices tab)

Field	What it does
Customer	The partner is a single Sage customer account: choose the account (its name is shown alongside). A Sage account can belong to only one EDI customer across all EDI channels – "You cannot have multiple EDI accounts for the same Sales Ledger account."
Analysis code and **Analysis value:**	The partner is a buying group: every Sage customer account whose analysis code (chosen here) holds the value in **Analysis value:** is a member. Orders and acknowledgements are not exchanged by EDI for a buying group – its members' orders are keyed in Sage – so the **Orders** and **Acknowledgements** tabs are unavailable and **Invoices enabled** is ticked for you.
GLN Anl Code:	Buying group only. The customer analysis code that holds each member's own GLN, for document formats that identify the member on the invoice.
Vendor no anl code:	Buying group only. The customer analysis code that holds a supplier number per member, where the document format needs one.
Route GLN: and **Agency:**	The partner's identifier on the EDI network and its qualifier. Incoming files from this sender are matched to this partner, and outbound interchanges are addressed to it. For example `5012345000024` and `14`, or an X12 ID such as `RETAILERID` with `ZZ`.

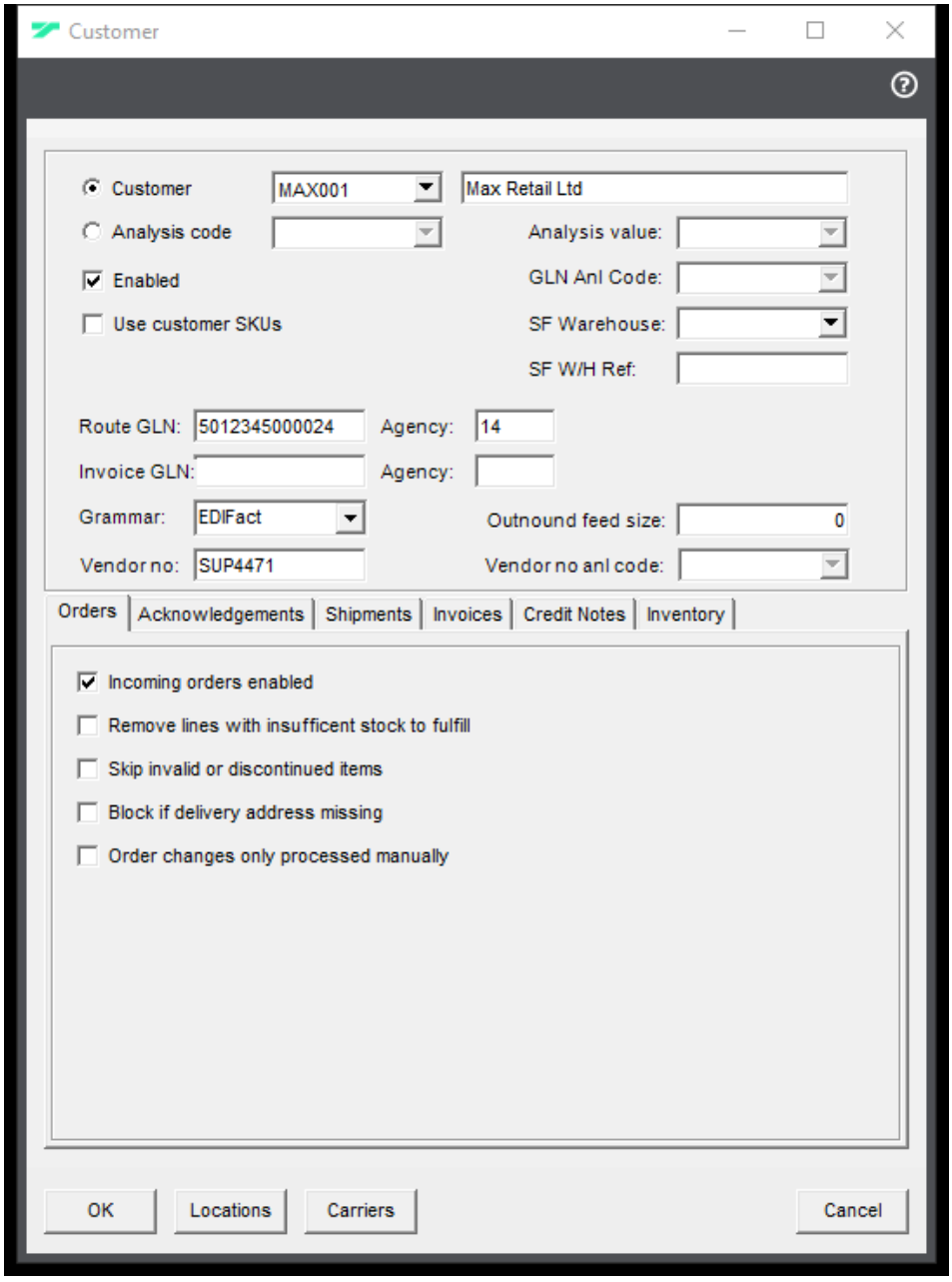
Field	What it does
Invoice GLN: and **Agency:**	The partner's invoice party GLN. Used to match incoming orders when the channel option **Use Invoice GLN to determine Sage Customer** is ticked, and by document formats that address documents to a different identity from the one that routes them.
Grammar:	The standard this partner uses: **EDIFact**, **Tradacoms** or **X12**. Required – "You need to choose a grammar".
Enabled	Switches the trading partner on. New EDI customers start disabled; incoming orders are only matched to enabled partners.
Outbound feed size:	The most documents of one type that go into one outbound file. **0** means no limit. Some partners require one document per file (**1**).
Vendor no:	Your supplier (vendor) number at this partner, where its document format sends one.
Use customer SKUs	Sends the partner's own item codes (your stock aliases for this customer) instead of your Sage item codes, where the document format supports it (Operator Guide, section 9.1).
SF Warehouse: and **SF W/H Ref:**	The ship-from warehouse and the partner's code for it, for document formats that report a ship-from location.

Each document tab starts with an enabled box that switches that document on for the partner, and has these common fields:

Field	What it does
Next batch number:	The next control number for this document type to this partner. Set it once when the partner is set up (usually 1, or the number the partner asks you to start from).
Testing	Marks this document's interchanges as test messages. Untick at go-live.
Use custom assembly	Lists the document formats in your bespoke extension (**Custom assembly** on **Settings** ▸ **General**, Operator Guide, section 3.1) instead of those supplied with Channels. Available only when a bespoke extension is set up.
Class:	The document format for this partner – for example the retailer's ASN format on the **Shipments** tab. Every document you send needs one.

> **Important:** Change a **Next batch number:** only when your trading partner agrees. Partners reject interchanges that reuse a control number they have already received.

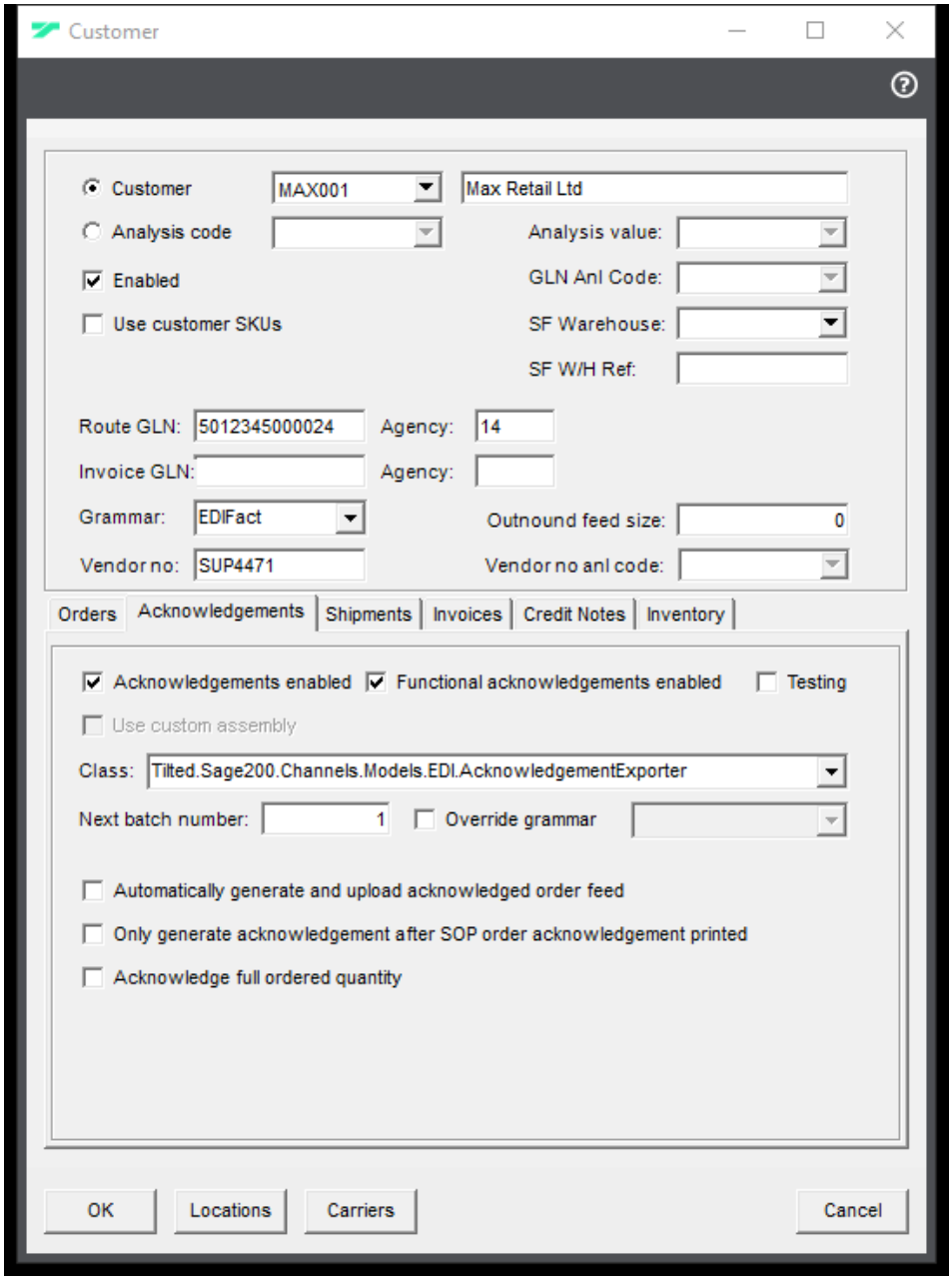
Orders tab



EDI – Customer, Orders tab

Field	What it does
Incoming orders enabled	Accepts orders and order changes from this partner. When unticked, the partner's stored orders are flagged in the order list with “Customer '…' is not setup for incoming orders”.
Remove lines with insufficient stock to fulfill	After the Sage order is created, removes stock lines that could not be fully allocated, so that the order (and its acknowledgement) covers only what you can ship.
Skip invalid or discontinued items	Leaves out order lines whose item cannot be found or is inactive in Sage, instead of stopping the order. Skipped lines are noted in the Channels log.
Block if delivery address missing	Does not convert an order whose delivery point GLN is not set up under **Locations**. The stored order stays in the order list until the location is added.
Order changes only processed manually	Order changes (X12 860, EDIFACT ORDCHG) from this partner are converted only when you convert them yourself in the order list, never by an automation.

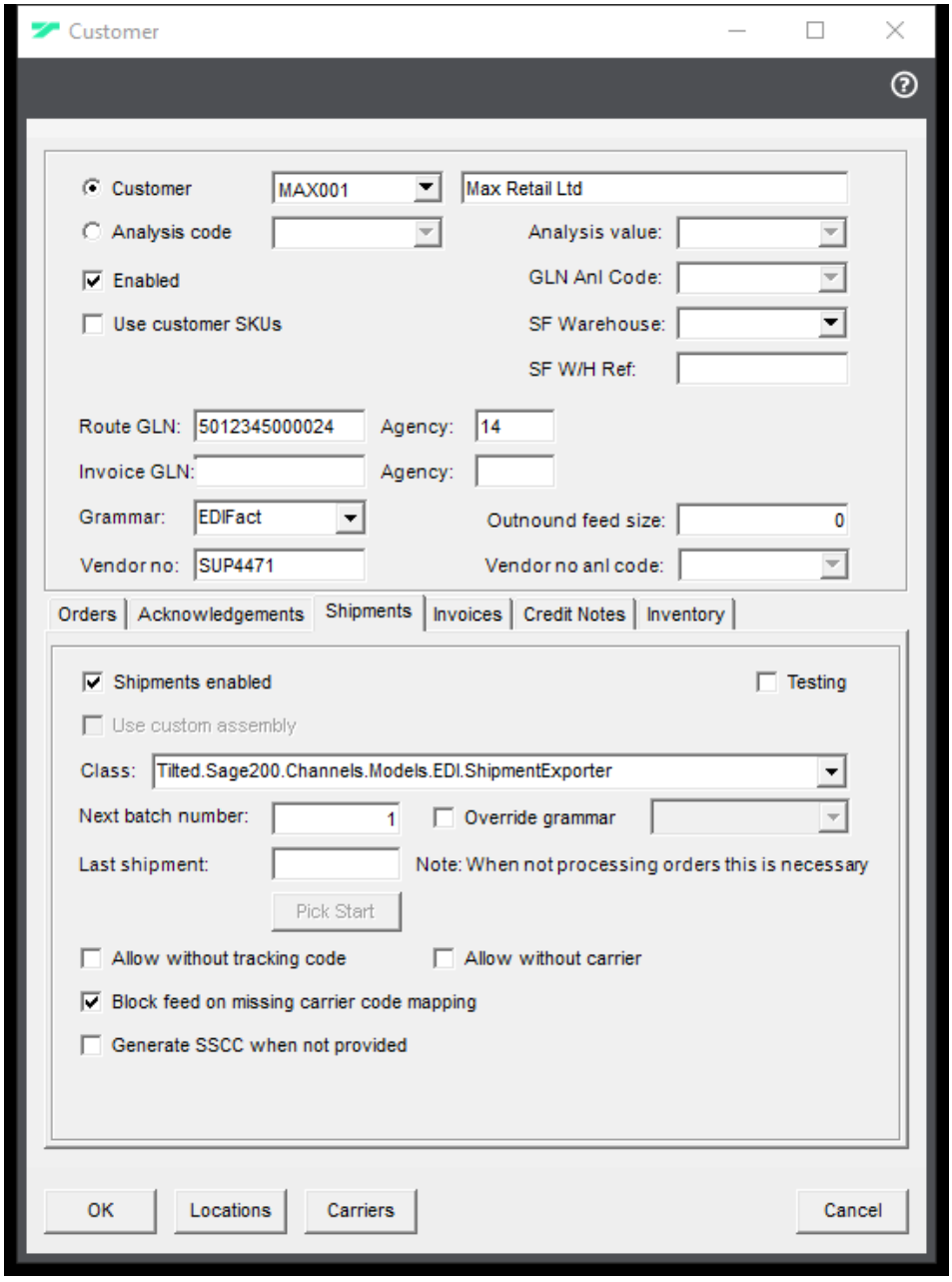
Acknowledgements tab



EDI – Customer, Acknowledgements tab

Field	What it does
Acknowledgements enabled	Sends order acknowledgements (for example EDIFACT ORDRSP or X12 855) and, for X12 partners, change acknowledgements (865) in the chosen document format.
Automatically generate and upload acknowledged order feed	Creates and sends the acknowledgement as soon as the order has been converted to Sage.
Only generate acknowledgement after SOP order acknowledgement printed	Holds the acknowledgement until the Sage order acknowledgement has been printed, so the order can be checked or amended first. Cannot be combined with the previous option – "You cannot automatically generate acknowledgements and wait for the order acknowledgement to be printed".
Functional acknowledgements enabled	X12 partners: sends a 997 functional acknowledgement for every order or order change file received from the partner.
Acknowledge full ordered quantity	Acknowledges the quantity ordered on each line instead of the quantity allocated.

Shipments tab



EDI – Customer, Shipments tab

Field	What it does
Shipments enabled	Sends despatch advices / ship notices (ASNs) for this partner's despatches.
Allow without tracking code	Allows a despatch to be sent when it has no tracking number. When unticked, the despatch waits until tracking has been added.
Allow without carrier	Allows a despatch to be sent when it has no courier. When unticked, the despatch waits until the courier has been added.
Block feed on missing carrier code mapping	Stops the export feed with an error if the despatch's courier has no row under **Carriers**, so that the partner never receives an unknown carrier code.
Generate SSCC when not provided	Creates an SSCC carton label number for cartons that do not have one, for document formats that require SSCCs.
Last shipment: and **Pick Start**	For partners whose orders do not arrive by EDI: Channels picks up this partner's Sage despatches with a despatch number after this one. **Pick Start** lets you choose a despatched order to start from. Required in that case – "You need to provide the last shipment number".

Invoices tab

The Invoices tab is pictured under **Customer – the trading partner** above.

Field	What it does
Invoices enabled	Sends this partner's Sage invoices by EDI.
Last invoice: and **Pick Start**	For partners whose orders do not arrive by EDI (including buying groups): Channels picks up invoices with an invoice number after this one. **Pick Start** lets you choose an invoiced order to start from. Required in that case – "You need to provide the last invoice number".
Sales order must also carry the customer group analysis value	Buying groups only. An invoice is sent only when every sales order on it carries the group's analysis value as well as the customer account – useful when a member's account is also used for orders from other channels.

Credit Notes tab

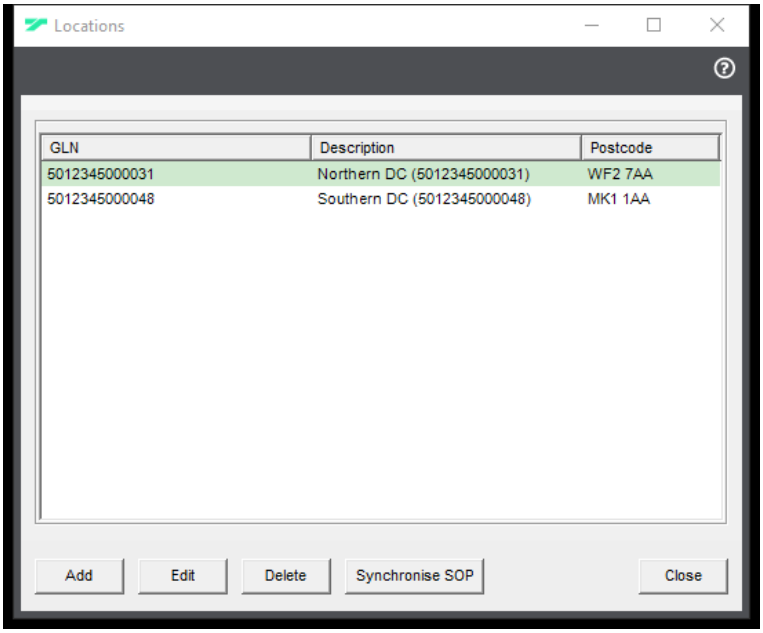
Field	What it does
Credit notes enabled	Sends this partner's Sage credit notes by EDI.
Last credit note: and **Pick Start**	For partners whose orders do not arrive by EDI: the credit note number to start from; **Pick Start** lets you choose a credited return. Required in that case – "You need to provide the last credit note number".

Inventory tab

Field	What it does
Inventory enabled	Sends inventory (stock) advices to this partner.
Alias group:	The stock alias group that lists the items this partner sells, with the partner's item codes. Only items in the group are reported (Operator Guide, section 9.1).

Locations – delivery points

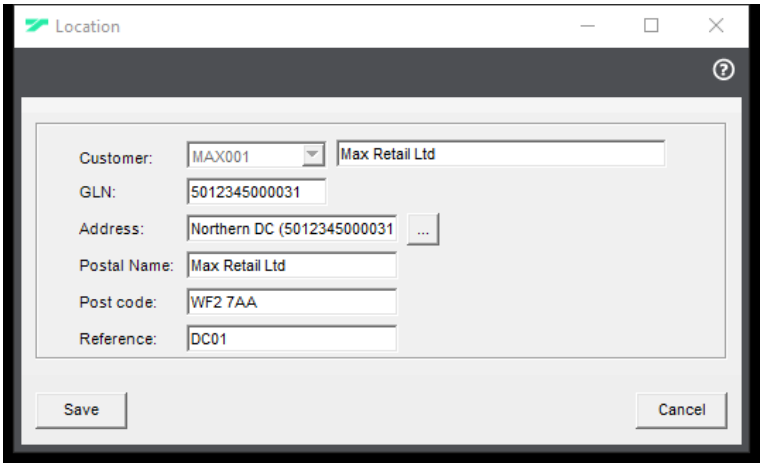
Many trading partners identify where an order is to be delivered with a delivery point GLN (EDIFACT NAD+DP, X12 ship-to code) rather than a full address. **Locations** links each delivery point GLN to a Sage customer delivery address, so that the order is delivered to the right address and outbound documents quote the right GLN.



EDI – Locations

Column	What it shows
GLN, **Description**, **Postcode**	The delivery point GLN and the Sage delivery address it points to.

Button	What it does
Add / **Edit**	Opens the **Location** window.
Delete	Removes the selected location after confirmation.
Synchronise SOP	Adds a location for every Sage delivery address of the customer (or of every member of a buying group) that does not have one yet. The GLN is taken from the text in brackets at the end of the delivery address description – for example a delivery address described as "Northern DC (5012345000031)" gets the GLN `5012345000031`. Edit any location whose GLN needs correcting.
Close	Closes the list.



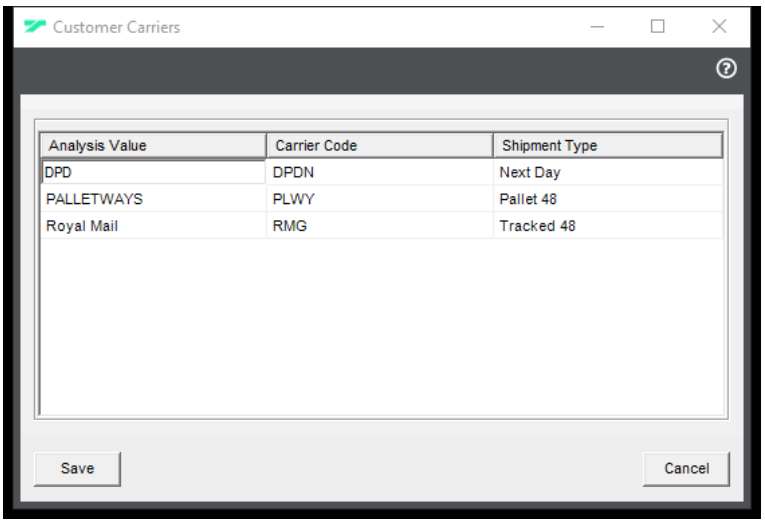
EDI – Location

Field	What it does
GLN:	The delivery point GLN. Required – "Please enter a GLN".
Reference:	The partner's own reference for the location (for example a store or depot number), where its document format sends one.
Customer:	Buying groups only: the member account whose delivery address this is.
Address: and **...**	Click **...** to choose the Sage delivery address; **Postal Name:** and **Post code:** are shown for checking. Required – "Please choose a delivery address".
Save / **Cancel**	Saves or discards the location.

When an incoming order quotes a delivery point GLN that is set up here, the Sage delivery address is used as it stands; otherwise the address in the order is used.

Carriers – carrier codes

Your warehouse or carrier integration records the courier on each despatch in its own terms (for example `UPS GROUND`). Most trading partners require their own carrier code (an X12 SCAC such as `UPSN`, or an EDIFACT carrier code) and sometimes a ship method. **Carriers** opens **Customer Carriers**, which translates one into the other for this partner.



EDI – Customer Carriers

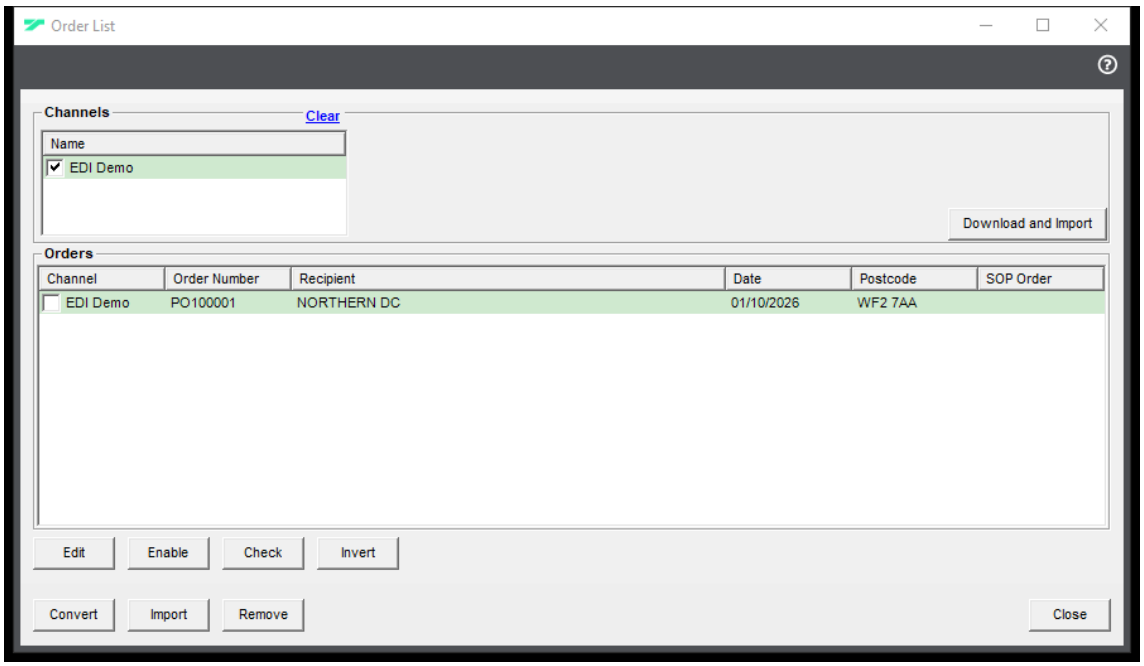
Column	What it shows
Analysis Value	The courier exactly as it is recorded on your despatches.
Carrier Code	The carrier code the partner expects.
Shipment Type	The ship method or service level the partner expects, where its document format sends one.

Click **Save** to keep the rows. A courier without a row is passed through unchanged, unless **Block feed on missing carrier code mapping** is ticked on the **Shipments** tab.

28.3 Screens

Channels ▸ EDI has six entries: **Order List**, **Converted Order List**, **Shipment List**, **Invoice List**, **Credit Note List** and **Inventory List**. They are the shared lists described in the Operator Guide; this section covers only what is particular to EDI.

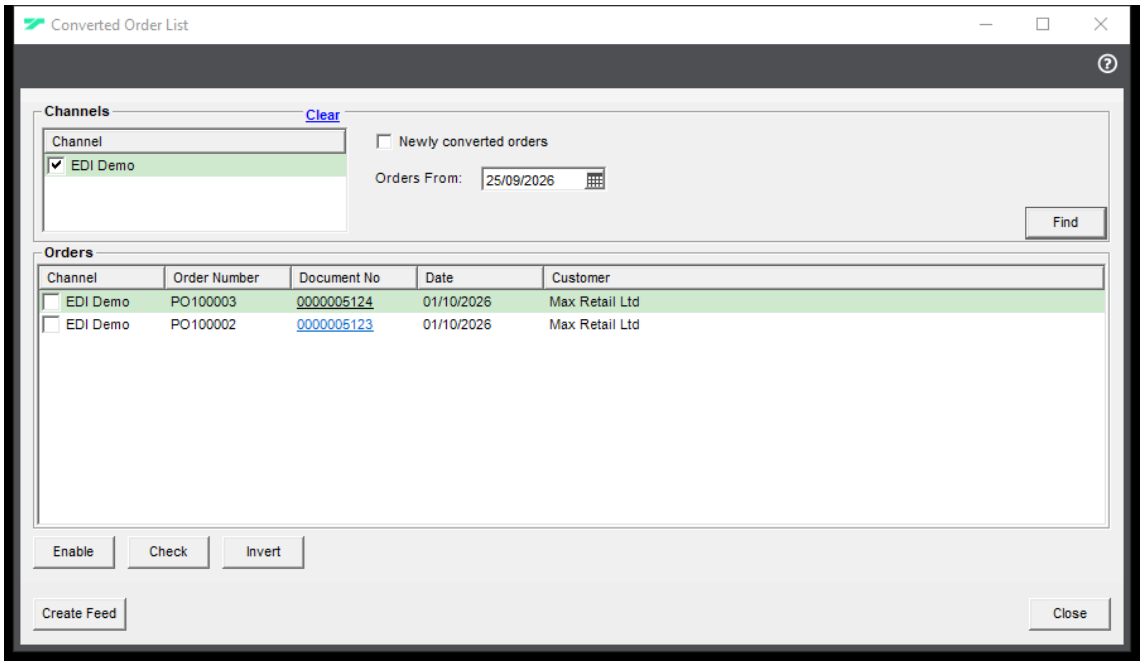
Screen	What it does
Order List	The find button is **Download and Import**: for each ticked EDI channel it downloads new files from the mailbox and imports every file in the channel's import folder. **Import** imports files you choose yourself; those files are copied to the archive and left where they were. Converting, removing and editing stored orders work as in the Operator Guide, sections 6.4 to 6.10.
Converted Order List	Lists converted EDI orders that are due an acknowledgement (Operator Guide, section 6.11). **Newly converted orders** shows orders for partners with **Acknowledgements enabled** that have not yet been acknowledged (and, where the partner waits for it, whose Sage order acknowledgement has been printed); **Orders From:** shows all converted orders from a date. **Create Feed** creates the acknowledgement files.
Shipment List	Lists despatches for partners with **Shipments enabled** (Operator Guide, section 13.3). Despatches without tracking or courier are held back when the partner does not allow them. **Find** also picks up despatches for partners whose orders do not arrive by EDI (from their **Last shipment:**).
Invoice List	Lists EDI invoices (Operator Guide, section 13.5). **Find** also picks up invoices for partners whose orders do not arrive by EDI (from their **Last invoice:**), including buying-group members.
Credit Note List	As the **Invoice List**, for credit notes.
Inventory List	Creates inventory feeds: one file for each enabled partner with **Inventory enabled**, listing the items in its **Alias group:** (Operator Guide, section 11.6).



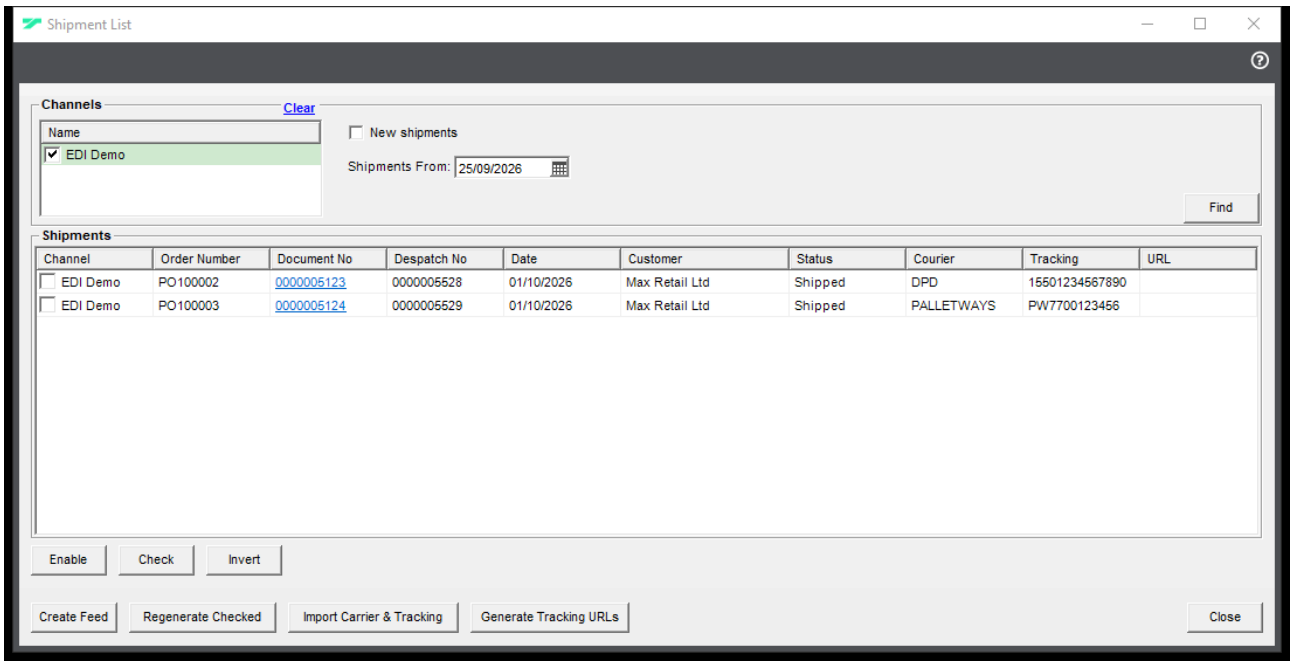
EDI – Order List

> **Important:** **Download and Import** connects to the FTP site of every ticked EDI channel with **FTP Enabled**, and deletes each downloaded file from the server. Untick channels you do not want to download from.

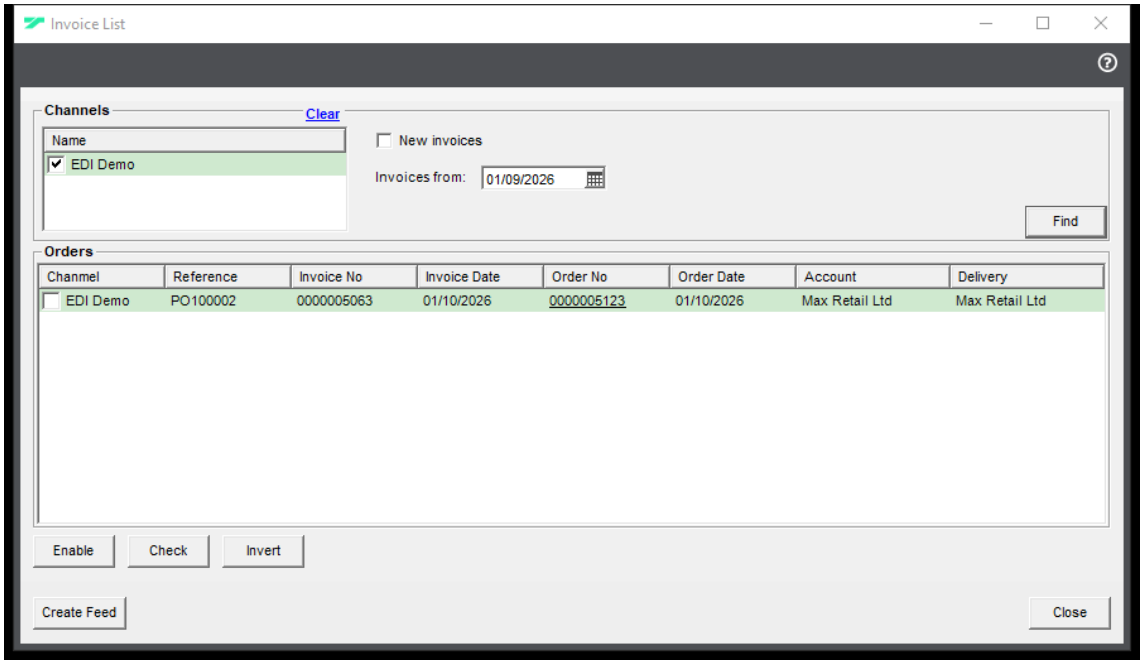
If a channel's download fails, the other channels still run and the failures are listed together at the end, for example “1 of 2 module(s) failed: …”.



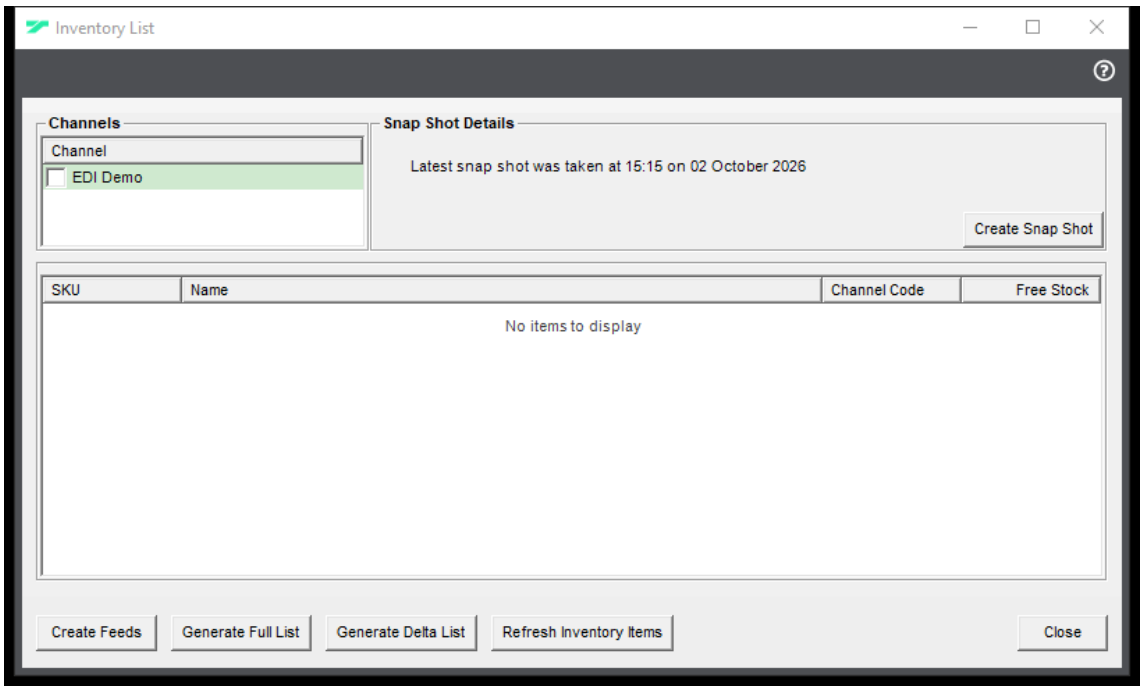
EDI – Converted Order List



EDI – Shipment List



EDI – Invoice List



EDI – Inventory List

Create Feed on the Shipment, Invoice and Credit Note lists reports "<n> feeds have been successfully generated." and, if any failed, "<n> feeds raised errors whilst processing, check Export Feeds / Errors to resolve.". The files are sent by the upload automations or from **Channels** ▸ **Export Feeds** (Operator Guide, section 14). None of the list screens sends anything to the partner by itself.

28.4 Automations

Add these to a job bag (Operator Guide, section 15.4). Every automation does nothing while the channel is not enabled.

Automation	What it does
Download new orders	Downloads new files from the mailbox and imports them as stored orders. Does nothing when the channel's **Default to not download orders** option is ticked (Operator Guide, section 5.1).
Process orders	Converts the stored orders and order changes to Sage. Orders already converted and changes to orders that do not exist are left in the list and noted in the log.
Create acknowledgement feeds	Creates acknowledgement files for newly converted orders of partners with **Acknowledgements enabled**.
Upload acknowledgement feeds	Sends acknowledgement, change acknowledgement and 997 files to the **Acknowledgement:** folder.
Generate Tracking URLs	Builds tracking links for despatches (Operator Guide, section 13.4).
Create shipment feeds	Creates despatch advice / ASN files for despatches not yet sent.
Upload shipment feeds	Sends them to the **Shipment:** folder.
Create invoice feeds	Creates invoice files for invoices not yet sent.
Upload invoice feeds	Sends them to the **Invoice:** folder.
Create credit note feeds	Creates credit note files for credit notes not yet sent.
Upload credit note feeds	Sends them to the **Credit note:** folder.
Create full inventory feeds / Create delta inventory feeds	Creates inventory files from the latest stock snapshot – everything, or only what has changed (Operator Guide, section 11.2). Skipped while inventory feeds are paused.
Upload inventory feeds	Sends inventory files to the partner.
Clear Invoiced Delivery Details	Removes personal delivery details from invoiced orders (Operator Guide, sections 5.1 and 15.4).

A typical schedule downloads and processes orders every 15–30 minutes, creates and sends acknowledgements straight after, and creates and sends shipments, invoices and inventory at the times your trading partners require.

28.5 Orders

1. **Download.** When **FTP Enabled** is ticked, every file in the FTP site's incoming folder plus the **Order:** sub folder is downloaded into the channel's import folder and deleted from the server.
2. **Import.** Each file in the import folder is read, its orders are stored and appear in the order list, and the file is moved to the channel's **Archive** folder for that day. A file that cannot be read stays in the import folder and is tried again next time; the reason is written to the Channels log.
3. **Match the trading partner.** Each order is matched to an enabled EDI customer by the sender of the file (the **Route GLN:**) – or by the invoice GLN in the order when **Use Invoice GLN to determine Sage Customer** is ticked. An order that cannot be matched is flagged in the order list; point at it to see the reason, for example “Failed to locate enabled EDI Customer using GLN '5012345000024'” (Operator Guide, section 6.10).
4. **Delivery address.** A delivery point GLN set up under **Locations** selects that Sage delivery address; otherwise the address in the order is used (the country defaults to the customer's).
5. **Convert.** The order is converted to a Sage sales order through the field mappings (Operator Guide, section 6.6), applying the partner's **Orders** tab options.
6. **Acknowledge.** For X12 partners with **Functional acknowledgements enabled**, a 997 is created for each file as it is imported. Order acknowledgements follow the partner's **Acknowledgements** tab.

Information kept with each order

Channels keeps the partner's own references with the stored order and its lines – for example the purchase order type, retailer order number, carrier and service, payment terms, dates, interchange control numbers, delivery point GLN, product identifiers (EAN, UPC, buyer and supplier part numbers), pack sizes and the partner's line numbers. The outbound document formats read them back so that acknowledgements, ASNs and invoices echo exactly what the partner sent.

The default EDI field mappings put the purchase order number in the Sage **Customer Document No**, the order date in the document date, the requested and latest delivery dates in the requested and promised dates, and the billing and delivery names and addresses, item code, description, quantity and unit price where you would expect them. Change them in **Field Mapping** (Operator Guide, section 5.3). Quantities ordered in packs (other than each) are also available as a base quantity and base unit price for mapping.

Order changes

Order changes are applied as described in the Operator Guide, section 6.8. For EDI:

- An X12 860 (or an 850 marked as a change) is applied to the Sage order it changes – quantities, prices, dates and cancelled lines – and recorded against the order. If any line of the order has already been despatched, the whole change is rejected with the reason “Order has despatched lines; change cannot be applied.”. A change acknowledgement (865, or 855 for partners that use it) is created when **Acknowledgements enabled** is ticked.
- An X12 860 that cancels the whole order removes every line from the Sage order and records the cancellation; the partner receives the 997 only.
- An EDIFACT ORDCHG is applied to the Sage order it changes.
- With **Order changes only processed manually** ticked, changes wait in the order list until you convert them yourself.

- A change whose original order has not been converted stays in the order list and is noted in the Channels log.

Functional acknowledgements (997)

- **Sent:** for an X12 partner with **Functional acknowledgements enabled**, one 997 is created for each 850 or 860 file imported, and the event is recorded against each Sage order it covers. It is sent with the acknowledgement uploads.
- **Received:** a 997 from the partner is matched to the file it acknowledges, and an accepted or rejected event is recorded against each Sage order in that file. A 997 that reports errors, and any 864 text message, is e-mailed to the **Default error emails:** address on **Settings ▸ Automation** (Operator Guide, section 15.2) so that you see partner rejections; if no address is set it is only written to the log.

28.6 Inventory

- Each enabled partner with **Inventory enabled** receives its own inventory advice (EDIFACT INVRPT or X12 846, in the partner's document format), listing only the items in its **Alias group:** with the partner's item codes.
- Full and delta inventory feeds, snapshots and pausing feeds work as described in the Operator Guide, sections 11.1 to 11.3.
- Inventory advices are sent to the **Inventory listing:** folder.

28.7 Shipments, invoices and other outbound documents

Outbound documents are created as export feeds (Operator Guide, section 14). Channels groups the documents by channel and trading partner, starts a new file whenever the partner's **Outbound feed size:** is reached, and writes each file in the partner's document format. The upload automations (or **Channels ▸ Export Feeds**) then send the files to the matching FTP sub folder.

Document	Created for	Sent to
Order acknowledgement / order response (ORDRSP, 855) and change acknowledgement (865)	Converted orders of partners with **Acknowledgements enabled**	**Acknowledgement:**
997 functional acknowledgement	Each X12 order or change file received, when **Functional acknowledgements enabled** is ticked	**Acknowledgement:**
Despatch advice / ship notice (DESADV, 856)	Despatches of partners with **Shipments enabled** that meet the tracking and carrier rules	**Shipment:**
Invoice (INVOIC, 810, TRADACOMS invoice)	Invoices of converted EDI orders, and of partners whose orders do not arrive by EDI	**Invoice:**
Credit note	Credit notes, as for invoices	**Credit note:**
Inventory advice (INVRPT, 846)	Enabled partners with **Inventory enabled**, for the items in their alias group	**Inventory listing:**

> Every document you send needs a **Class:** on the partner's document tab. Choose the document format your Tilted consultant has agreed with the partner; it decides the layout, the identifiers and references used, and which of the partner tab options apply.

Partners whose orders are keyed in Sage

Some partners send no EDI orders but still want EDI despatch advices or invoices – for example the members of a buying group. Leave **Incoming orders enabled** unticked and set **Last shipment:**, **Last invoice:** or **Last credit note:** to the last document already dealt with. Each time the Shipment, Invoice or Credit Note

list is searched (or the matching automation runs), Channels picks up the partner's newer Sage documents, links them to the EDI channel and moves the starting number on. For a buying group, the documents of every member account are picked up.

28.8 Files, folders and transport

Each EDI channel works in a folder named after the channel under the Channels **Root folder:** (**Settings ▸ General**, Operator Guide, section 3.1):

Folder	Contents
`<Root folder>\<channel name>`	The import folder: files downloaded from the mailbox, or placed there by your VAN software, waiting to be imported.
`<Root folder>\<channel name>\Archive\<yyyy-MM-dd>`	Every imported file, by the day it was imported. A file with the same name as one already archived that day gets a number added, for example `orders (1).edi`.
`<Root folder>\<channel name>\Feeds\<date>`	Every outbound file, named by export feed number (Operator Guide, section 14.6). Files are given the `.edi` extension when they are sent.

- **Through FTP** (the usual set-up): tick **FTP Enabled** and choose the FTP site. The site's incoming and outgoing folders plus the sub folders on the FTP page give the full paths. FTP, FTPS and SFTP are supported (Operator Guide, section 3.2).
- **Through VAN or AS2 software on your own server:** untick **FTP Enabled**. Have the software place incoming files in the channel's import folder, and collect outgoing files from the **Feeds** folder. **Download and Import**, and the download automation, then simply import whatever is in the import folder.

28.9 Points to note

- A Sage customer account can be on only one EDI customer, across all EDI channels.
- New EDI customers are created disabled. Tick **Enabled** and **Incoming orders enabled** before the first orders arrive.
- Untick **Testing** on every document tab when the partner moves you to live, and keep the **Next batch number:** sequences unchanged after go-live.
- Importing the same X12 file again creates and sends another 997.
- A purchase order the partner sends again after it has been converted appears in the order list but is not converted a second time; remove it from the list.
- Keep the import folder for EDI files only. Any other file (for example a text note) is reported as an unknown EDI file type every time the folder is imported.
- X12 documents other than 850, 860, 997 and 864 (for example 820 remittances) are not imported.
- Orders and acknowledgements are not exchanged by EDI for buying groups; their invoices, credit notes and despatch advices are.
- Separators, standard versions and layouts come from the partner's document format. If a partner changes its specification, ask Tilted for an updated format.

29. Text & Excel Files

29.1 What it does

A **Text & Excel Files** channel brings orders into Sage 200 from files, and sends files back. A customer, a trading partner or another of your own systems drops **order files** – CSV, Excel, XML or JSON – into a folder or onto an FTP site. Channels reads each file using a **template** you load from a sample, groups the rows into orders using a **key column** (for example the customer's order number), stores them, maps the columns onto Channels' order fields and creates Sage sales orders – or sales returns, if the channel is set up for returns.

The same channel can then send files back to whoever sent the orders:

- **Acknowledgements** – the order has been received and entered in Sage.
- **Shipments** – the order has been despatched, with courier and tracking.
- **Deliveries** – the order has been delivered (proof of delivery).
- **Invoices** and, for return channels, **credit notes**.

Each outgoing document has its own template and file format, and can be sent by FTP, by e-mail, as a copy to a folder and/or to a web address (a REST end point).

A Text & Excel Files channel has one more use: with **Record manually entered orders / returns** ticked, every sales order you key by hand in Sage is linked to the channel as if it had arrived in a file. This lets hand-keyed orders take part in Channels processes – acknowledgement, shipment and invoice files, and fulfilment by a third-party warehouse (chapter 30).

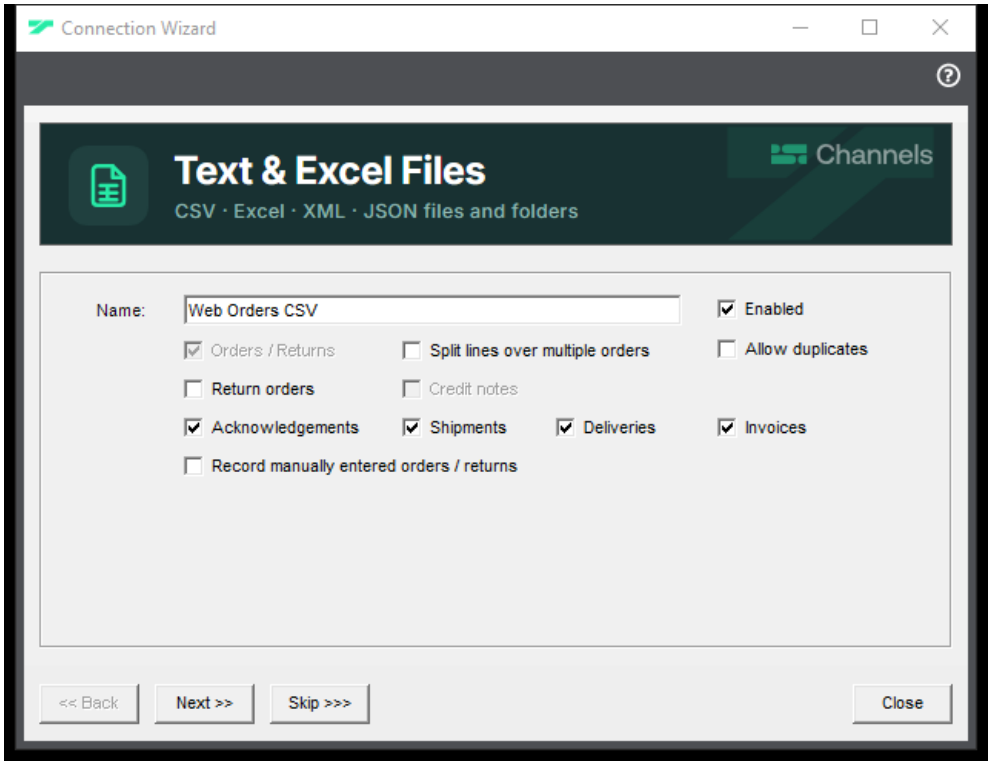
Before you start

Have a **sample of each file**: one order file with every column the sender uses, and an example of each file you will send back if the recipient has a set layout.

29.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Text File** (Operator Guide, section 4.2). The wizard has these pages, in order: Connection, the Order template, the five outgoing templates (acknowledgement, shipment, delivery, invoice, credit note), FTP, e-mail, copy and REST end point, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5). An outgoing template page is greyed out until you tick that document on the Connection page.

Connection page

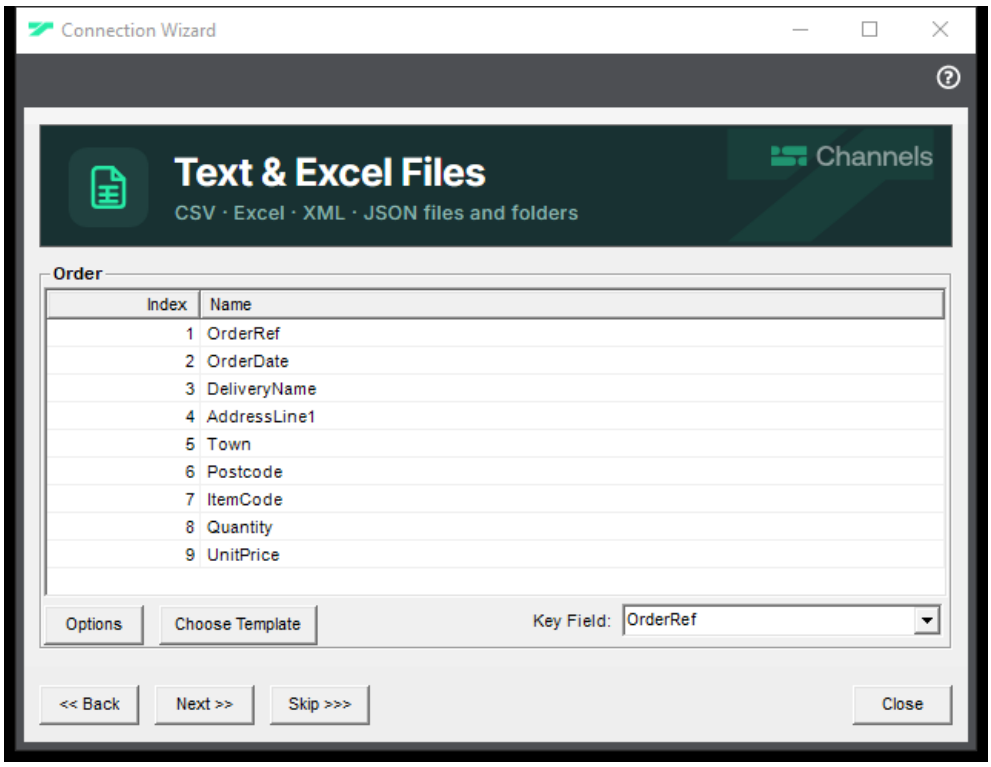


Text & Excel Files – connection page

Field	What it does
Name:	The channel's name. It also names the channel's import folder, `<Root folder>\<channel name>` (Operator Guide, section 3.1). Required – "You need to provide a name".
Enabled	Switches the channel on. Disabled channels are left out of the lists and the automations.
Orders / Returns	Always ticked – a Text & Excel Files channel always imports orders.
Return orders	The files are **returns**: each order in the file creates a Sage sales return instead of a sales order. Ticking it clears and greys out **Acknowledgements**, **Shipments**, **Deliveries** and **Invoices**, and makes **Credit notes** available.
Credit notes	Send credit-note files for the returns (return channels only).
Acknowledgements	Send acknowledgement files. The channel appears on the **Converted Order List**.
Shipments	Send shipment files. The channel appears on the **Shipment List**.
Deliveries	Send delivery files. The channel appears on the **Delivery List**.
Invoices	Send invoice files. The channel appears on the **Invoice List**.
Split lines over multiple orders	Every row of a file becomes an order of its own, even when rows share a key value (the repeats are numbered _1, _2 …).
Allow duplicates	Accept an order whose key value has been imported before, and create it in Sage again. Leave it off unless the sender genuinely re-uses order numbers.
Record manually entered orders / returns	Link sales orders keyed by hand in Sage to this channel (sales returns instead, when **Return orders** is ticked). To leave a customer out, tick **Disable recording of manual orders / returns** on the Channels tab of the customer record (Operator Guide, section 16.7). Tick this on **one** channel only.

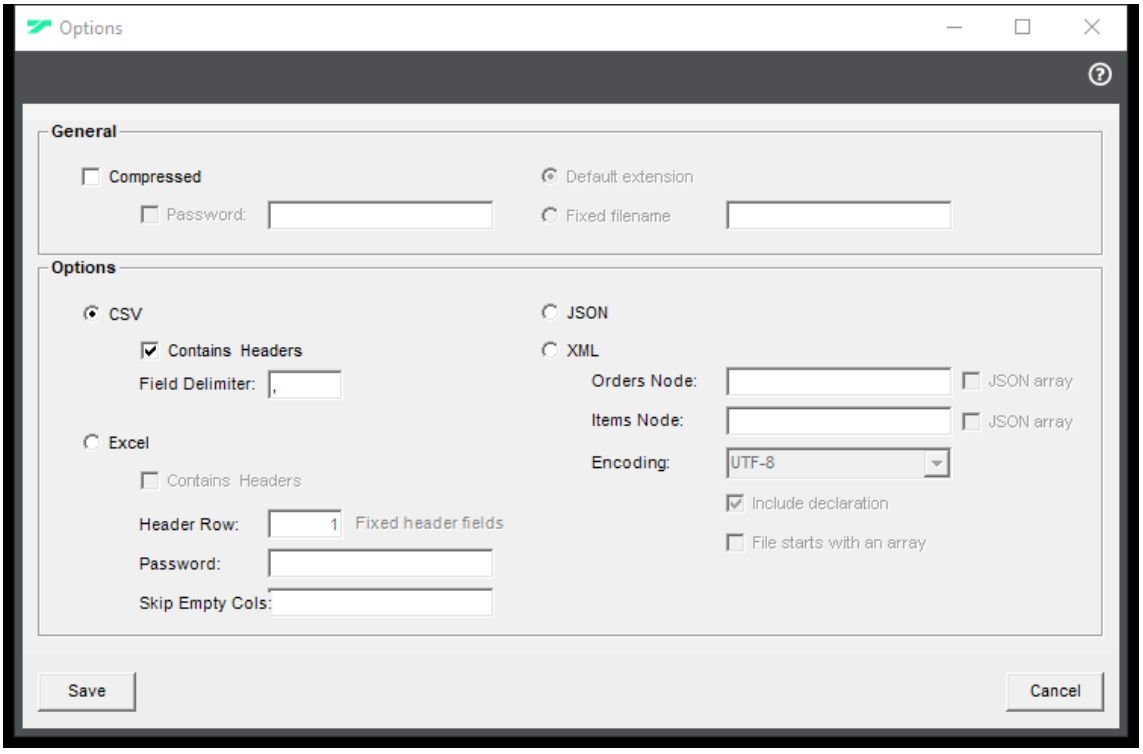
Template pages

There is one template page for incoming orders and one for each outgoing document. The pages, **Choose Template**, **Key Field:** and the **Options** window (file format) work as described in the Operator Guide, section 4.9. For a Text & Excel Files channel:



Text & Excel Files – the Order template page

- **Key Field:** is on the Order page only. Rows with the same value become one order, and the value is the stored order's identifier on the **Order List**. If a new template no longer has the key column you are told “The key field '…' is not in the new template. Choose a key field before leaving this page.”
- Incoming .zip files are unzipped before they are read (**Compressed**, with the **Password:** if one is set).
- For XML and JSON, the node labels change with the template – for example **Shipments Node:** or **Credits Node:** on the outgoing pages.
- **Default extension** / **Fixed filename** are not used on the Order page.

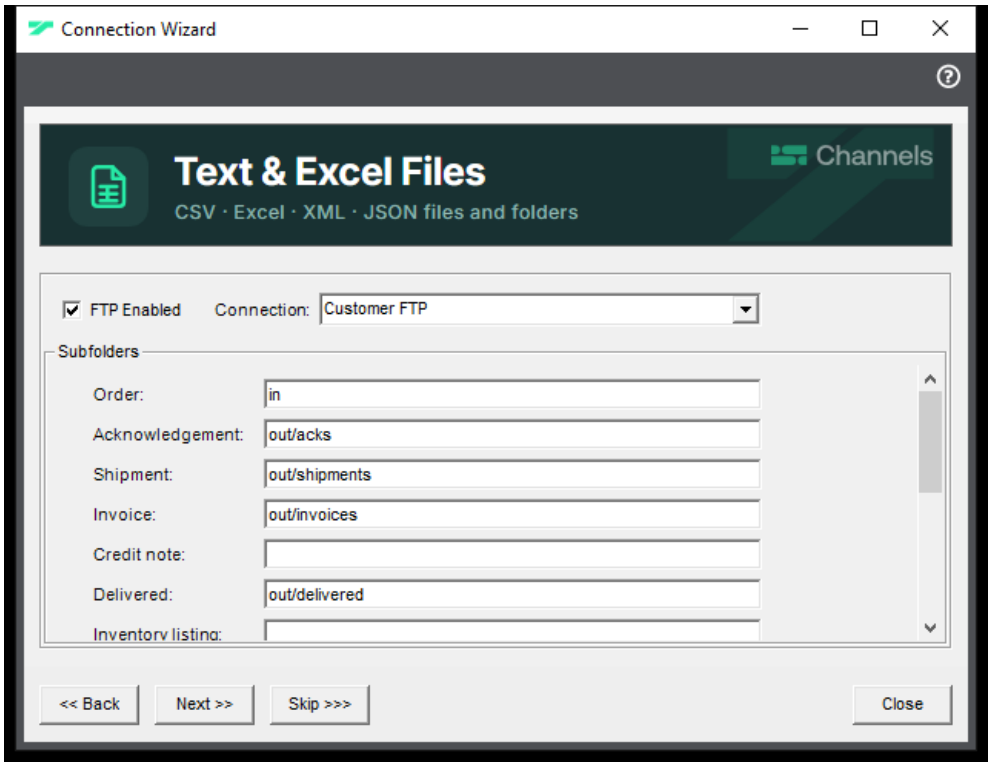


Text & Excel Files – file options

Map the template's columns onto Channels' fields with **Value Mapping ▸ Fields** on the **Customisation** page (Operator Guide, section 5.3). For an order file the usual fields are **Customer Account Number**, **Customer Document No**, **Document Date**, **Requested Date**, the delivery address fields, **Item Code**, **Quantity** and **Unit Price**.

> **Important:** CSV and Excel files are read by **column position**: the columns of every incoming file must be in the same order as in the template. If the sender changes their layout, load a new template.

FTP page



Text & Excel Files – FTP page

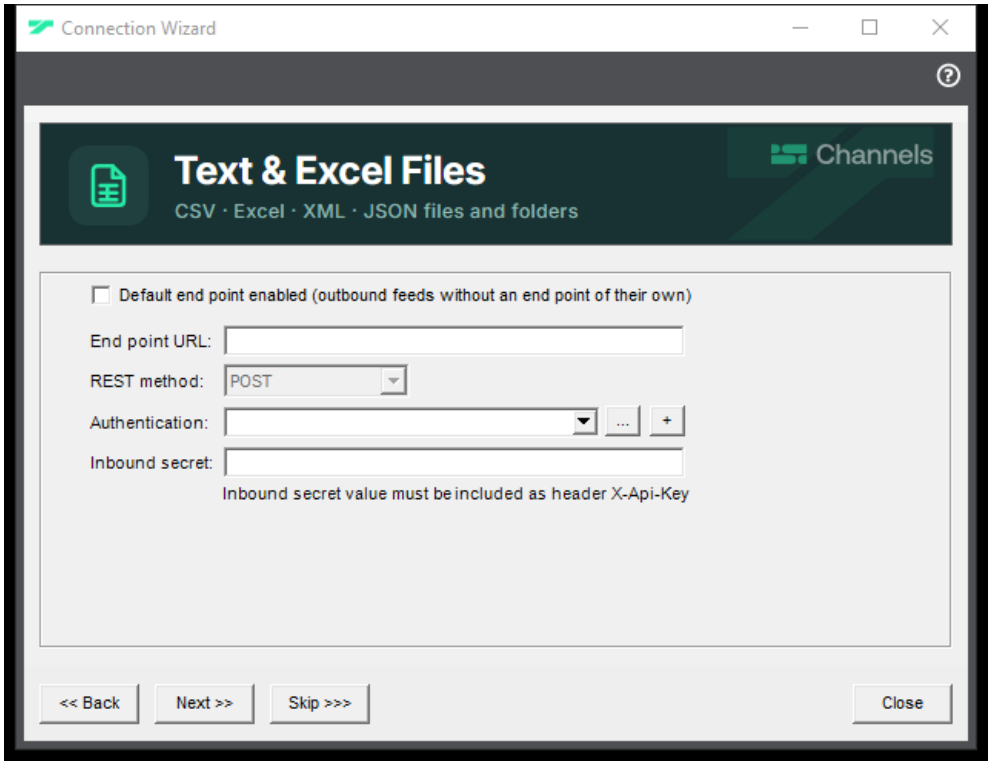
The shared FTP page (Operator Guide, section 4.8). For a Text & Excel Files channel:

Field	What it does
Order:	The folder on the FTP site the order files are collected from. Files are **removed from the FTP site** once they have been downloaded.
Acknowledgement:, **Shipment:**, **Delivered:**, **Invoice:**, **Credit note:**	The folders each outgoing file is uploaded to.
Other sub-folders	Used by Third Party Logistics and Inventory channels – leave them blank.

E-mail, copy and REST end point pages

Field	What it does
Outgoing emails enabled, **Emails:**, **Subject:**, **Body:**	E-mail every outgoing file to the listed addresses (separate them with commas or semicolons), using the mail server set up for the Tilted add-ons.
Copy Export Feed Files Enabled, **Folder:**, **Use feed type sub-folders**	Copy every outgoing file to a folder (use **...** to browse), optionally into Acknowledgement, Shipment, Delivery and Invoice sub-folders.
Default end point enabled (outbound feeds without an end point of their own)	Post every outgoing file to a web address. **End point URL:**, **REST method:** and **Authentication:** work as described in the Operator Guide, section 5.10 (“The default end point URL needs to be a full http:// or https:// address”).

Field	What it does
Inbound secret:	The key a system must present (header **X-Api-Key**) when it posts files into Sage through the Channels web API instead of using a folder (Operator Guide, section 8.7).



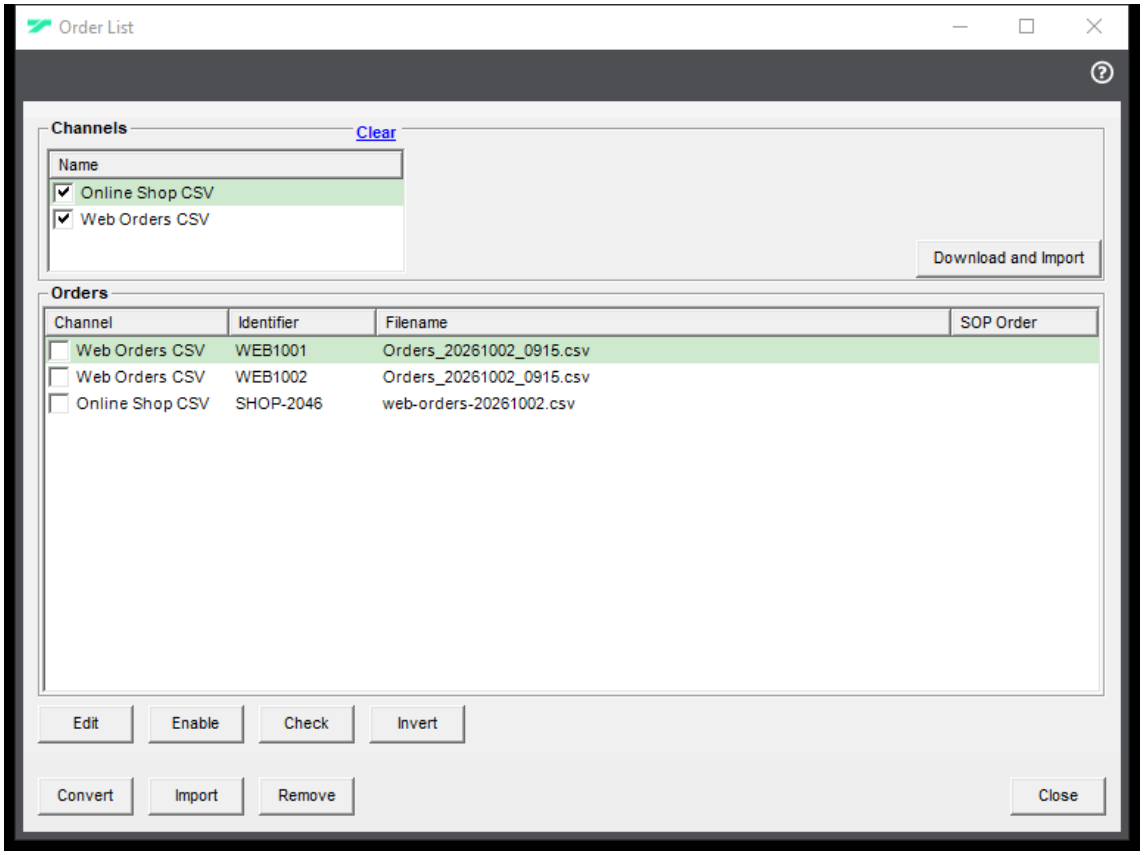
Text & Excel Files – REST end point page

29.3 Screens

Channels ▸ Text & Excel Files has these entries for the channel: **Order List**, **Converted Order List**, **Shipment List**, **Delivery List**, **Credit Note List** and **Invoice List**. The **Inventory List**, **Customer List** and **Products** entries on the same menu belong to the Inventory, Customers and Products channels (Operator Guide, sections 11.5, 7 and 12).

Each list shows the enabled Text & Excel Files channels, all ticked; a channel only appears on an outgoing list when that document is ticked on its Connection page. The lists are the shared lists (Operator Guide, sections 6.2, 6.11, 13.3, 13.5 and 13.6); what is particular to Text & Excel Files is described here.

Order List



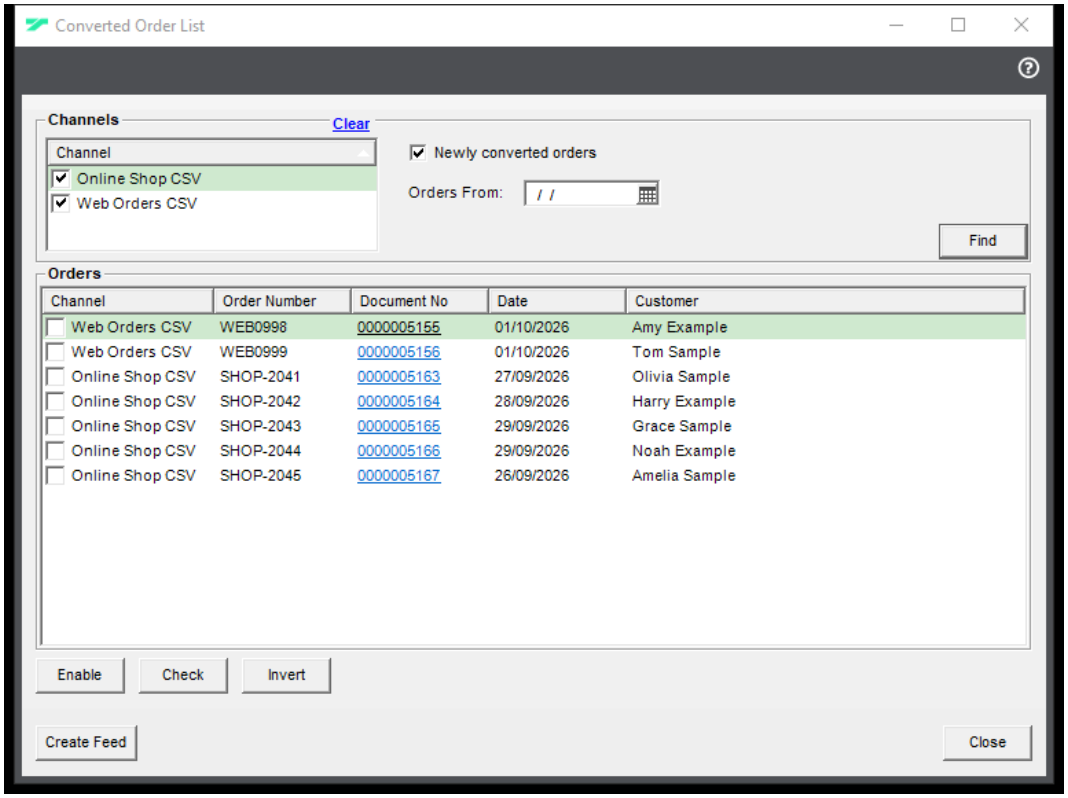
Text & Excel Files – Order List

Stored orders read from files but not yet turned into Sage orders. Columns: **Channel**, **Identifier** (the key value), **Filename** (the file the order came from) and **SOP Order** (a link to the Sage order once converted).

Button	What it does
Download and Import	For each ticked channel: collects files from the FTP site (when FTP is enabled), then reads every file in the channel's folder and moves each one into `Archive\yyyyMMdd` beneath it.
Import	Reads files you choose, from anywhere. The originals are left where they are; a copy is kept in the archive folder.

Convert, **Edit** and **Remove** work as described in the Operator Guide, sections 6.4 to 6.10. A file whose template has no key field set is refused: “It looks as though you haven't set up the key field for this import template”.

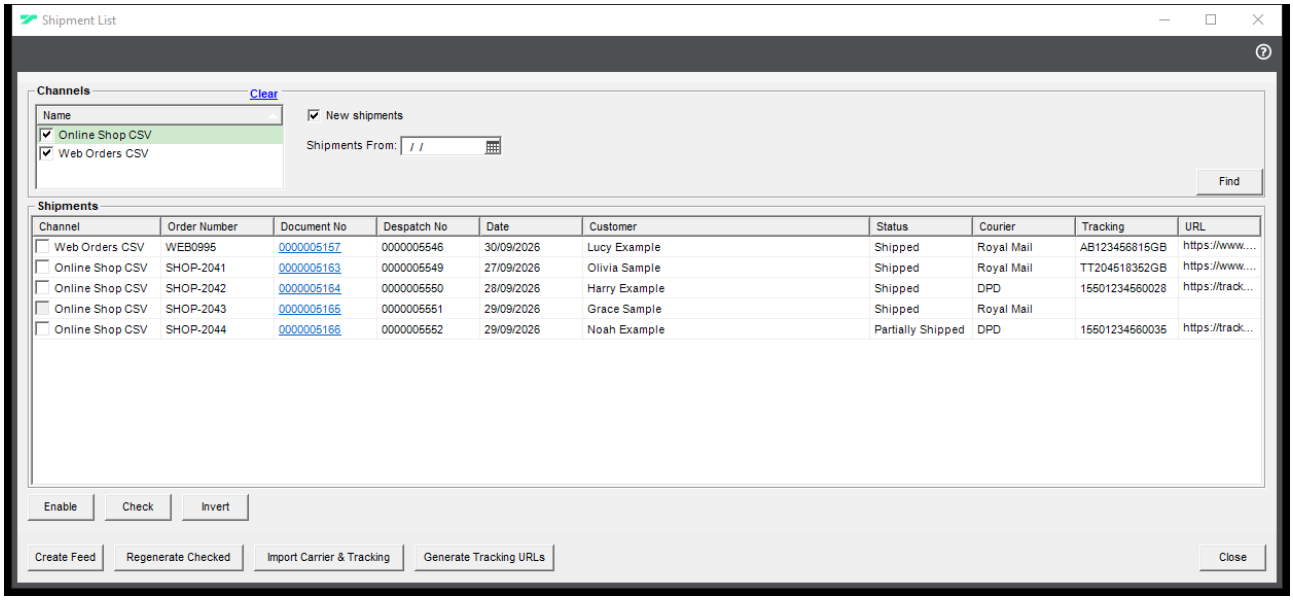
Converted Order List



Text & Excel Files – Converted Order List

Tick orders and click **Create Feed** to write an acknowledgement file. The file is sent by **Submit** on **Channels** ▸ **Export Feeds** (Operator Guide, section 14) or by the upload automation.

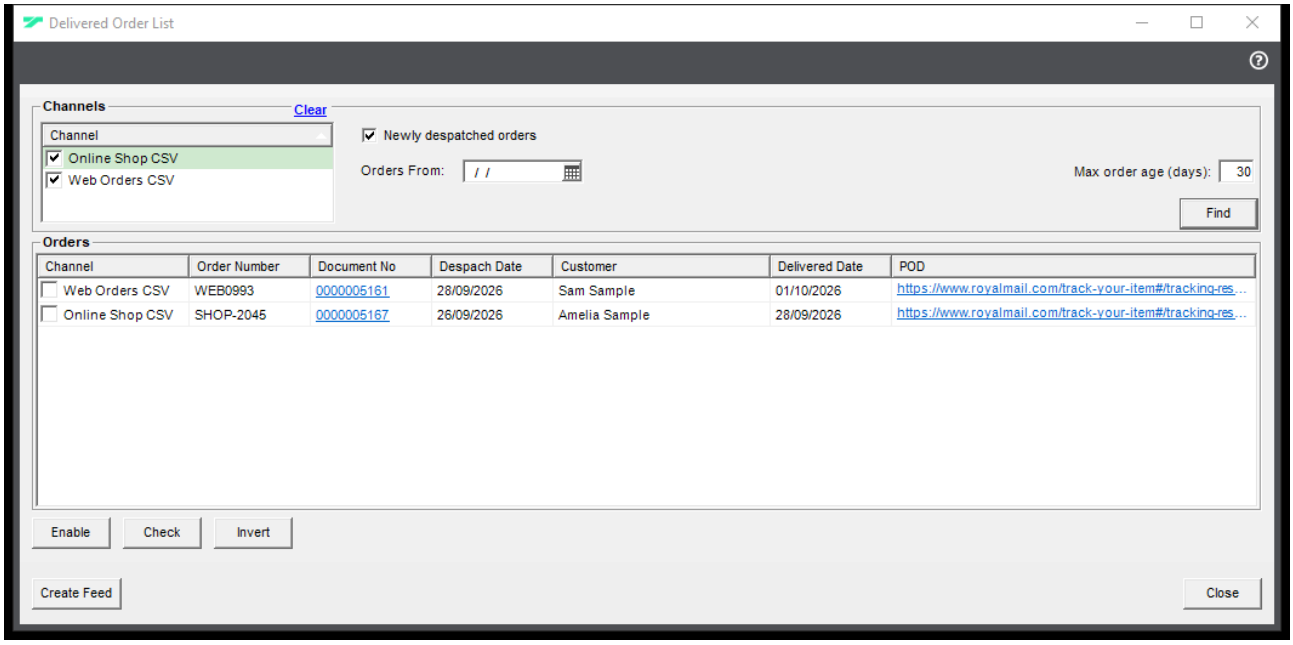
Shipment List



Text & Excel Files – Shipment List

Despatches of this channel's orders. Check or enter **Courier**, **Tracking** and **URL**, tick the rows and click **Create Feed** to write a shipment file. **Import Carrier & Tracking**, **Generate Tracking URLs** and **Regenerate Checked** are described in the Operator Guide, section 13.3.

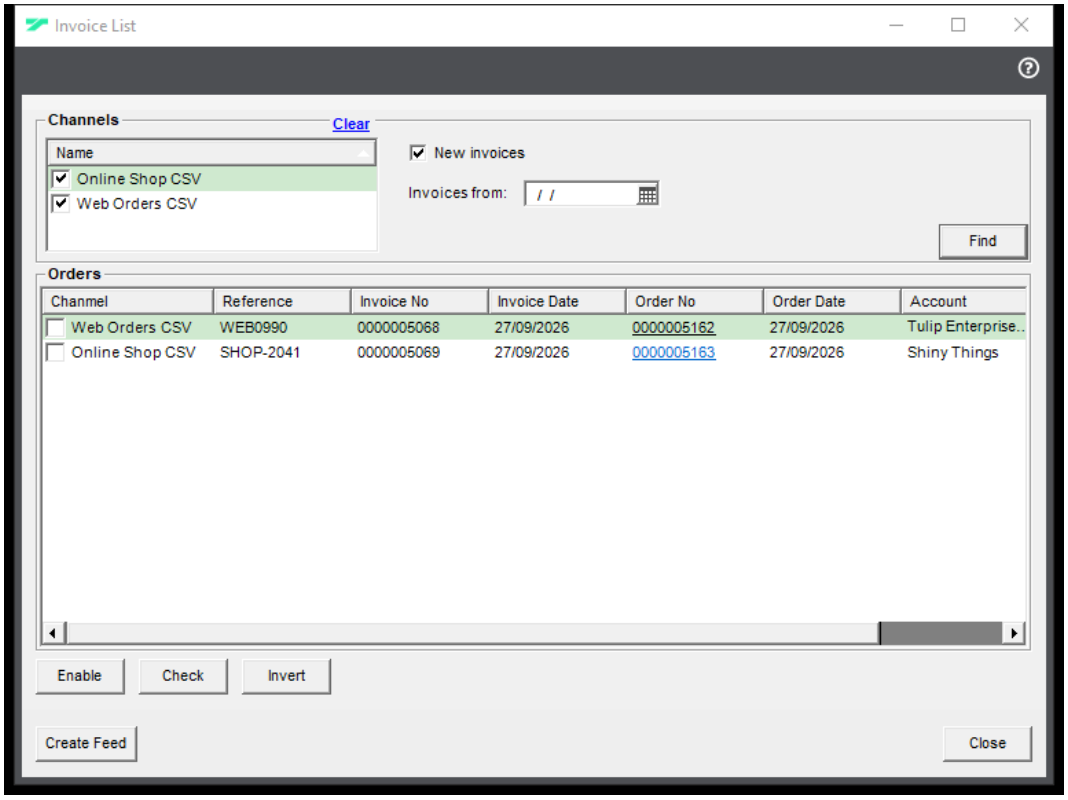
Delivery List



Text & Excel Files – Delivered Order List

Orders that have been delivered (window title **Delivered Order List**, Operator Guide, section 13.6). Only channels with **Deliveries** ticked are listed. The **POD** column opens the proof of delivery. Tick orders and click **Create Feed** to write a delivery file.

Invoice List and Credit Note List



Text & Excel Files – Invoice List

Sage invoices (or, on the **Credit Note List**, credit notes) for this channel's orders (Operator Guide, section 13.5). Tick them and click **Create Feed** to write the file ("You need to select some invoices" / "You need to select some credit notes" if none are ticked).

29.4 Automations

Add these to a job bag (Operator Guide, section 15.4). Each **Create** automation writes files; the matching **Upload** automation sends them. Only add the automations for documents you have ticked on the Connection page.

Automation	What it does
Download new orders	Collects files from the FTP site and reads every file in the channel's folder into the **Order List**.
Process orders	Converts the stored orders into Sage orders or returns. An order already in Sage is left on the list as a duplicate unless duplicates are allowed.
Create acknowledgement feeds / **Upload acknowledgement feeds**	Acknowledgement files for converted orders not yet acknowledged, then send them.
Generate tracking URLs	Brings shipment details up to date and builds tracking links (Operator Guide, section 13.4).
Create shipment feeds / **Upload shipment feeds**	Shipment files for despatches not yet sent whose required fields (for example tracking) are filled in, then send them.
Create delivery feeds / **Upload delivery feeds**	Delivery files for orders delivered in the last 30 days, then send them.
Create invoice feeds / **Upload invoice feeds**	Invoice files for invoices not yet sent, then send them.
Create credit note feeds / **Upload credit note feeds**	Credit note files, then send them.
Clear invoiced delivery details	Removes the delivery name, address and contact details from completed, invoiced orders after the number of days set on the channel's **Channel Options** (Operator Guide, sections 5.1 and 15.4).

29.5 Orders

Taking orders from files

1. The sender puts a file on the FTP site's order folder, or you (or another system) save it into the channel's folder, `<Root folder>\<channel name>`.
2. **Download and Import** on the **Order List** (or **Download new orders**) collects and reads the file. Rows with the same key value become one stored order; the file is moved to the channel's archive folder for that day.
3. Check the new rows on the **Order List**. **Edit** shows the values read from the file.
4. **Convert** (or **Process orders**) creates the Sage sales orders – or returns – using the field mappings, value mappings and channel options (Operator Guide, sections 5 and 6.6).

Recording hand-keyed orders

1. Tick **Record manually entered orders / returns** on one Text & Excel Files channel.
2. When a sales order is saved in Sage for a customer without **Disable recording of manual orders / returns**, it is linked to that channel automatically.
3. The order then appears on the channel's lists like an imported order, and – if it has lines in a third-party warehouse – takes part in 3PL fulfilment (chapter 30).

29.6 Shipments, invoices and other outgoing files

1. Tick the document on the Connection page, load its template and map its fields with **Value Mapping**
   - **Fields** on the **Customisation** page.

2. When orders are converted, despatched, delivered or invoiced in Sage they appear on the **Converted Order List**, **Shipment List**, **Delivery List**, **Invoice List** or **Credit Note List**.
3. **Create Feed** (or the **Create … feeds** automation) writes the file as an export feed. CSV files hold every document from that run; XML and JSON files hold one document each.
4. **Submit** on **Channels ▸ Export Feeds** (or the **Upload … feeds** automation) sends it: to the FTP folder, then the copy folder, then the end point, then by e-mail – whichever are switched on. Sent files and any errors are on **Channels ▸ Export Feeds** (Operator Guide, section 14).

29.7 Points to note

- Keep the layout of incoming CSV and Excel files fixed – values are read by column position, not by header name.
- A file that cannot be read stays in the channel's folder and is tried again on the next run; the rest of that run's files wait with it. Check the Channels log if a file is not appearing on the **Order List**.
- Files collected from the FTP site are removed from it. Archived copies are kept in the channel's `Archive` folder, one sub-folder per day.
- An order identifier that has already been imported is not imported again unless **Allow duplicates** is ticked.
- Outgoing CSV files are written without quotes; a value containing the delimiter has it replaced with a space.
- Use one channel per sender and per file layout; a channel can only have one order template.

30. Third Party Logistics

30.1 What it does

A **Third Party Logistics** (3PL) channel connects Sage 200 to a warehouse run by another company. Channels tells the 3PL what to pick, pack, receive and return, and records in Sage what the 3PL reports back: acknowledgements, shipments, goods received, returns received, stock adjustments and stock counts.

Each 3PL channel works on one of two **bases**:

Basis	How it works
Warehouse	The 3PL runs one of your Sage warehouses. Sales order lines in that warehouse are **released** to the 3PL. Purchase orders (goods the 3PL is to receive), sales returns (goods coming back) and purchase returns (goods going back to suppliers) for the warehouse can be sent too. The 3PL's shipments are despatched in Sage, its goods-received notes book the purchase orders in, and its stock counts are compared with Sage.
Supplier	The 3PL is one of your suppliers and ships to your customers directly (drop-ship or back-to-back). Lines for items that supplier provides are sent to it; Channels can raise a Sage purchase order for each one. The 3PL's shipments receive the purchase order and despatch the sales order, its invoices are entered against the purchase order, and its stock files keep a **virtual warehouse** of its stock for your inventory feeds (Operator Guide, section 9.4).

And one of two **transports**:

- **Files** – each document is a file laid out to the 3PL's template, sent and collected by FTP, e-mail, a copy folder or a web address. Works with any 3PL.
- **Connector** – Channels talks to the 3PL's own system directly. The connector available is **ShipStream** (section 30.8). Sales orders, cancellations, sales returns and purchase orders are sent as ShipStream

requests; shipments, receipts, stock movements and stock levels are read back from ShipStream and processed exactly as if they had arrived as files.

Every send carries a **release reference**: the Sage document number for the first release (`0000012345`), then `0000012345/2`, `0000012345/3` for later releases of the same order. The 3PL quotes it back so that each shipment or acknowledgement is matched to the right release.

3PL channels need the Third Party Logistics licence and do not count towards your licensed number of channels.

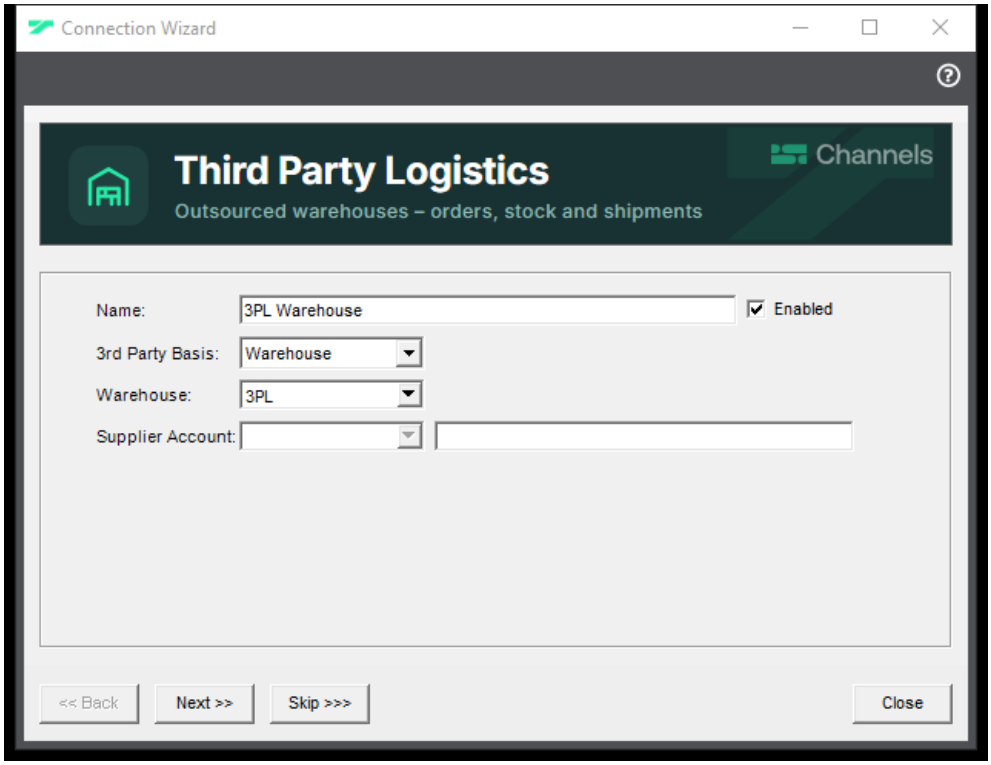
Before you start

Agree with the 3PL: which documents you will exchange, the layout of each file (or, for ShipStream, the API user, warehouse id and store code), how they will reference your orders (ideally the release reference), and when files are collected. Create the Sage warehouse the 3PL runs (Warehouse basis) or the supplier account (Supplier basis).

30.2 Setting it up

On **Channels** ▸ **Channel List** click **Add** and choose **Third Party Logistics** (Operator Guide, section 4.2). The pages are: Connection, General Options, Sales Options, Supplier Options, Inventory Options, acknowledgements, supplier shipping, fourteen template pages, FTP, e-mail, copy, REST end point and Connector, followed by the **Customisation** page every channel shares (Operator Guide, sections 4.10 and 5). When the channel uses the **Connector** transport, the wizard skips the outgoing template pages and the FTP, e-mail and copy pages.

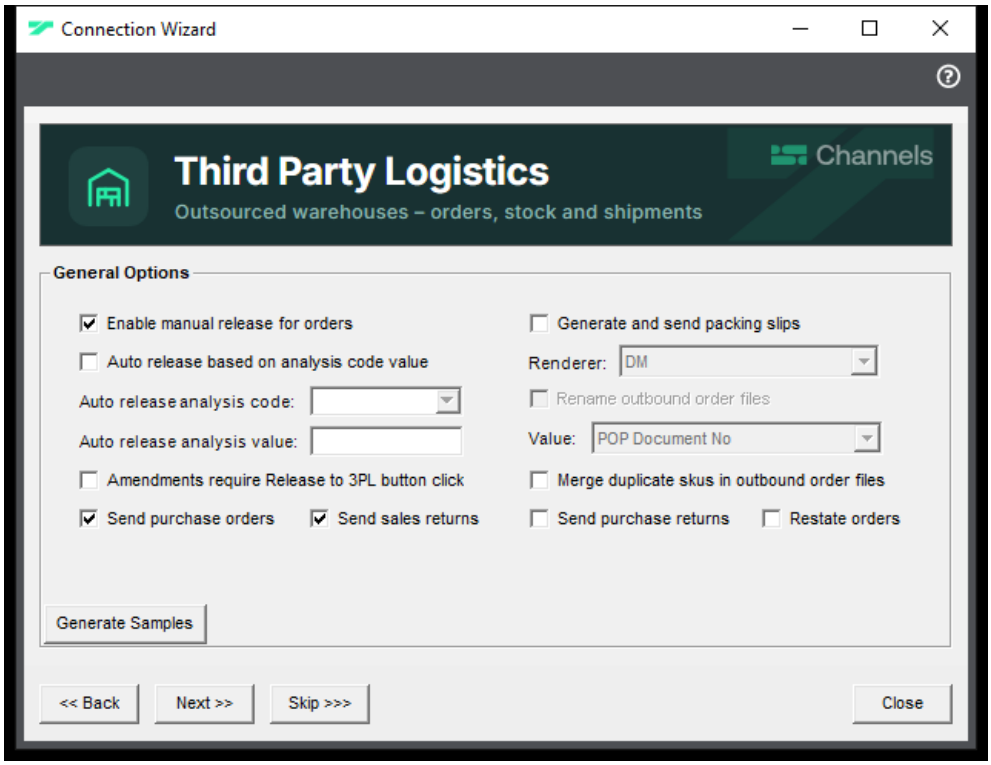
Connection page



Third Party Logistics – connection page

Field	What it does
Name:	The channel's name; also the name of its folder, `<Root folder>\<channel name>`, which holds one sub-folder per incoming document (Acknowledgement, Shipment, Invoice, Inventory, InventoryAdjustments, SalesReturnReceipt, PurchaseOrderReceipt, PurchaseReturnShipment …). Required ("You need to provide a name").
Enabled	Switches the channel on.
3rd Party Basis:	**Warehouse** or **Supplier** – see section 30.1.
Warehouse:	Warehouse basis: the Sage warehouse the 3PL runs. Every line in this warehouse is the 3PL's.
Supplier Account:	Supplier basis: the 3PL's supplier account; its name is shown beside it.

General Options



Third Party Logistics – General Options

Field	What it does
Enable manual release for orders	Nothing is sent until someone releases it – from **Manual Release** or the **Release to 3PL** button on the Sage order. Applies to sales orders, sales returns, purchase orders and purchase returns.
Auto release based on analysis code value	Release only documents whose analysis code (below) holds the value below. When a document is released Channels sets the code to **Released**.
Auto release analysis code:	The sales order analysis code that controls release. For purchase orders and returns the same analysis code is used on the purchase document.
Auto release analysis value:	The value that means "ready to go", for example **Ready**.
Amendments require Release to 3PL button click	Further releases of an order already sent (more quantity, a new line) wait until someone clicks **Release to 3PL** on the order.
Send purchase orders, **Send sales returns**, **Send purchase returns**	Warehouse basis: also send purchase orders, sales returns and purchase returns that have lines in the 3PL's warehouse.
Generate and send packing slips, **Renderer:**	Produce a PDF packing slip with each outgoing order, in the chosen layout, and send it to the **Packing slip:** FTP folder ("You need to choose a packing slip renderer").

Field	What it does
Rename outbound order files, Value:	Supplier basis: name each outgoing order file after the **POP Document No** (requires **Raise purchase orders**), the **SOP Document No** or the **SOP Customer Document No**.
Merge duplicate skus in outbound order files	Add together the quantities of lines for the same item (and batch) so the 3PL receives one line per item.
Restate orders	For 3PLs that cannot take "additions only" releases or separate cancellation files. Every send after the first is the whole order again, each line at its current ordered quantity; a line that has been reduced to nothing or removed – and every line, when the order is cancelled – is sent at quantity 0. No cancellation requests are sent (section 30.5). Available on the Warehouse basis with the **Files** transport only, and not with **Use warehouse allocations for fulfilment requests** (Sales Options); otherwise the box is greyed out.
Generate Samples	Writes example file layouts (Outgoing Order, Inbound Acknowledgement, Inbound Shipment, Inbound Invoice, Inbound Inventory) to a folder you choose – a starting point to agree layouts with the 3PL.

Sales Options

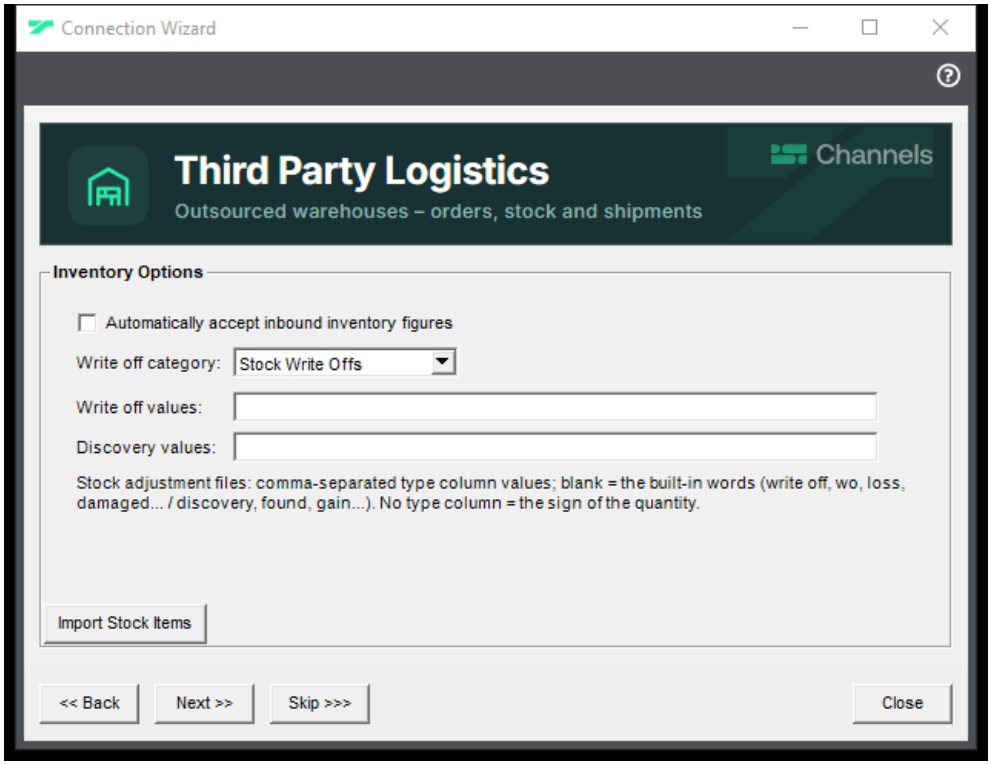
Field	What it does
Generate SOP invoice on shipment receipt	Invoice the sales order as soon as the 3PL's shipment has been despatched in Sage.
Post SOP invoice on shipment receipt	Post that invoice as well (available when the option above is ticked).
Include manually entered sales orders	Only read when **Source channels** are ticked: hand-keyed orders (ones no channel created) are then taken too. With no source channels ticked every order is eligible and this box is ignored.
Source channels	Tick the inbound channels whose orders this 3PL takes – an order that came in through any other channel is left alone by this module. None ticked = every order (the behaviour before this option existed). An order the module already holds stays with it whatever is ticked, so nothing already sent is orphaned. Why an order was or was not taken is in the Tilted log ("3PL '…' leaves '…' alone: …").
Use warehouse allocations for fulfilment requests	Warehouse basis: release only the quantity **allocated** in Sage (plus anything already despatched) instead of the full ordered quantity. More is released as more is allocated.
Include standard stock items only	Leave non-stock lines out of the order files.

Supplier Options

Supplier basis only – the first four boxes are cleared and greyed out on Warehouse basis.

Field	What it does
Raise purchase orders	Create a Sage purchase order to the 3PL for every order sent. It is created **on hold** with the order file and made live when the file is sent.
Use supplier part numbers	Send the supplier's part number instead of your item code.
Use selling unit price on purchase orders	Price purchase order lines at the sales order's net selling price, instead of the supplier list price.
Use supplier tax code	Purchase order lines take the supplier's default tax code instead of the item's.
Default PO Analysis Codes	Fixed analysis code values for the raised purchase orders. Save the channel first ("Please save this channel before applying default analysis codes").
SO to PO Analysis Code Mapping	Copy sales order fields into purchase order analysis codes (columns **PO Analysis Code**, **SO Field**).

Inventory Options



Third Party Logistics – Inventory Options

Field	What it does
Automatically accept inbound inventory figures	Warehouse basis: post the differences in each stock count file straight away instead of waiting for review on the **Inventory Synchronisation List**.
Write off category:	The Sage write-off category used for stock the 3PL reports missing. Without it, write-offs are not posted.
Write off values:, **Discovery values:**	For stock adjustment files with a type column: the words the 3PL uses for a loss and for a find, separated by commas. Leave blank to use the built-in words (write off, loss, damaged … / discovery, found, gain …). With no type column, a negative quantity is a write-off and a positive one a find.
Import Stock Items	Supplier basis: import or export the list of items the 3PL supplies (code, always-include flag, warehouse, shipping charge, supplier stock code).

Acknowledgements

Field	What it does
Enable inbound acknowledgements	The 3PL confirms every order it receives. The Sage order is put **on hold** when it is sent and made live again when the 3PL accepts it.
Delete rejected purchase orders	Supplier basis: cancel the raised purchase order when the 3PL rejects the order.
Delete rejected sales lines / orders	Supplier basis: cancel the sales order lines the 3PL rejected, and the order if none are left.
Rejection emails:	Addresses told when an order is rejected (subject "<CHANNEL NAME> Acknowledgement Rejected").

The value that means **accepted** is set in **Field Mapping** (**Value Mapping** ▸ **Fields** on the **Customisation** page, Operator Guide, section 5.3): on the **Inbound Sales Order Acknowledgement** tab, select the **AcknowledgementResponse** row and click **Options** (**Acknowledgement Accept Response**, "Expected

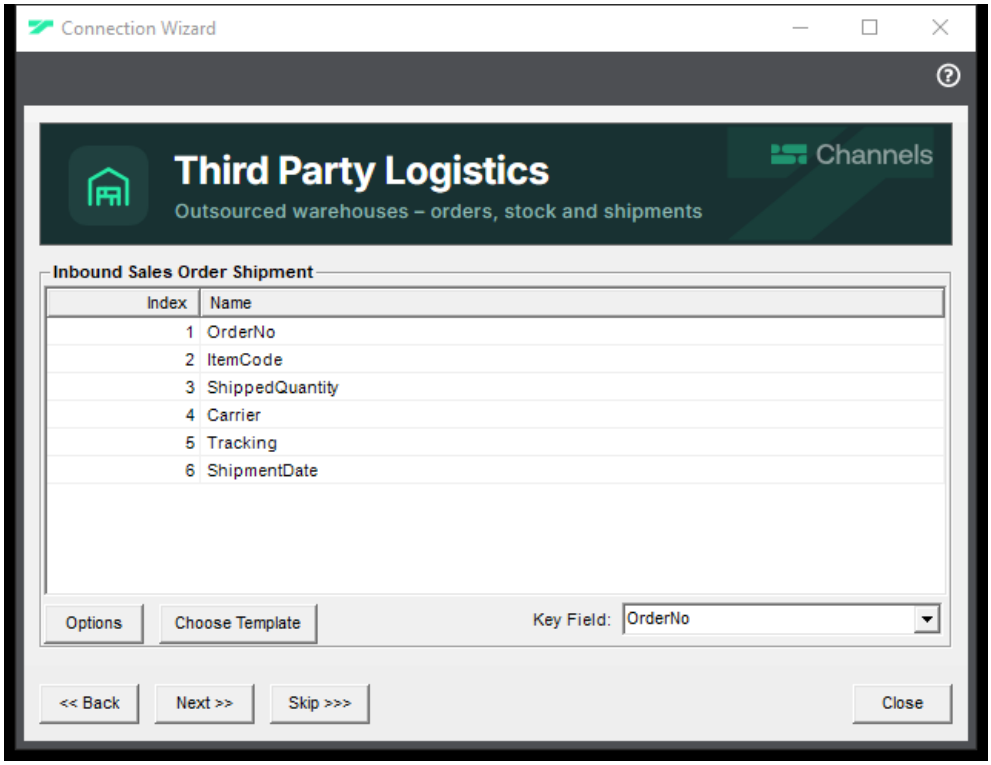
response to accept shipment request:"). For a ShipStream channel leave it blank – ShipStream acceptances are recognised automatically.

Supplier shipping

Field	What it does
Include supplier shipping additional charge	Add a carriage charge to each raised purchase order.
Additional charge:	The Sage POP additional charge to use.
Charge value field:	An order field (from the incoming channel order) holding the charge, when it varies by order.
Default value:	The charge to use when there is no value.

Template pages

Each document you exchange by file has a template page (**Choose Template**, **Key Field:**, **Options**), which works as described in the Operator Guide, section 4.9. Load only the templates you have agreed with the 3PL. Pages for incoming documents with a **Key Field:** group the file's rows into one document per key value – choose the column holding the release reference, goods-received note or delivery number. On the five outgoing templates the **Options** window also has the **End point** area, which sends that document to its own web address.



Third Party Logistics – a template page

Template page	Direction	Main fields
Outbound Sales Order	To the 3PL	Release reference (**ShipmentReference**), order and customer document numbers, dates, delivery address, item code (or the 3PL's alias), quantity, price, carrier, analysis codes
Inbound Sales Order Acknowledgement	From the 3PL	Document number or release reference (key), item, quantity, **AcknowledgementResponse**
Inbound Sales Order Shipment	From the 3PL	Release reference (key), **ItemCode**, **ShippedQuantity**, ship date, carrier, service, tracking, tracking URL, SSCC, bill of lading

Template page	Direction	Main fields
Inbound Sales Order Invoice	From the 3PL	Supplier basis: order reference (key), invoice number and date, item, quantity, price
Outbound Sales Order Cancellation Request	To the 3PL	Release reference, line, original and cancelled quantity
Outbound Sales Return	To the 3PL	Return number, reference, items and quantities expected back
Inbound Sales Return Receipt	From the 3PL	Return number, receipt reference (key), item, quantity, date
Outbound Purchase Order	To the 3PL	PO number, reference, supplier, expected date, items, quantities ordered / received / outstanding
Inbound Purchase Order Receipt	From the 3PL	PO number, GRN (key), item, quantity, date
Outbound Purchase Return	To the 3PL	Return number, supplier, items and quantities to send back
Inbound Purchase Return Shipment	From the 3PL	Return number, despatch reference (key), item, quantity, date, carrier, tracking
Inbound Inventory List	From the 3PL	Item code and counted stock (**CountedStock**); one stock count per file
Inbound Inventory Adjustment	From the 3PL	Item code, quantity, type, reference, date, unit cost

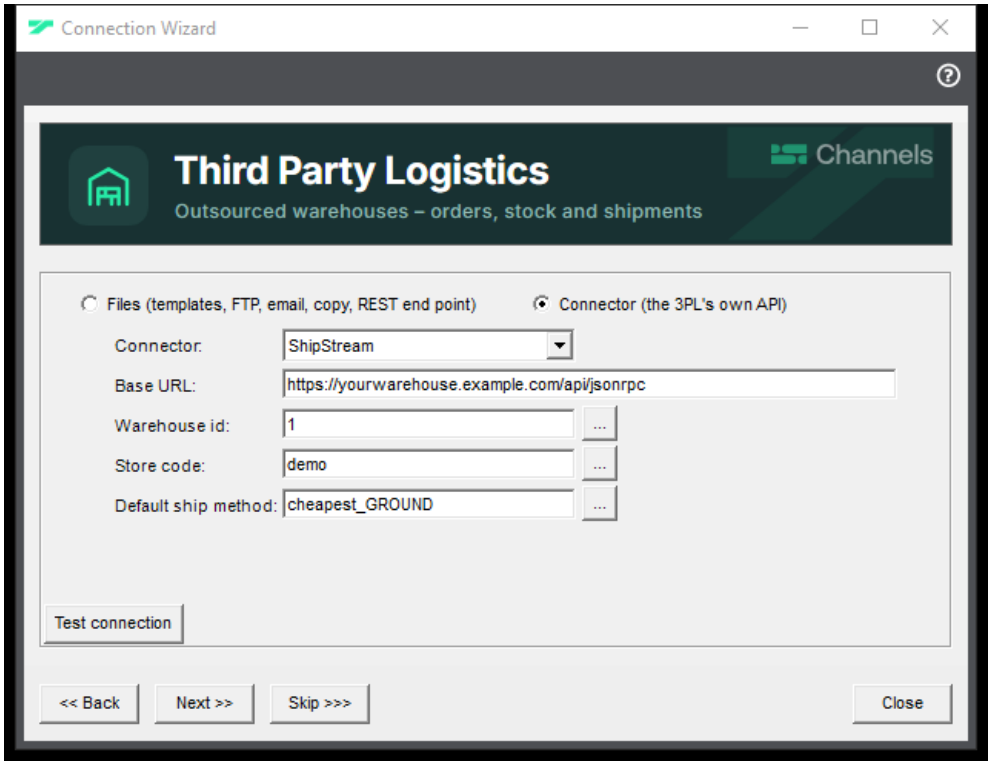
FTP, e-mail, copy and REST end point pages

As for Text & Excel Files (section 29.2; Operator Guide, sections 4.8 and 5.10), with these 3PL fields:

Field	What it does
Order:, **Sales return:**, **Purchase order:**, **Purchase return:**	FTP folders the outgoing documents are uploaded to.
Acknowledgement:, **Shipment:**, **Invoice:**, **Inventory listing:**, **Inventory adjustment:**, **Sales return receipt:**, **Purchase order rcpt:**, **Purchase return ship:**	FTP folders the 3PL's files are collected from (they are removed from the FTP site once collected).
Packing slip:	Where packing slips are uploaded.
Upload PDF	Supplier basis with **Raise purchase orders**: upload the purchase order PDF with each order file.
Attach PDF instead of data file	E-mail page, supplier basis with **Raise purchase orders**: e-mail the purchase order PDF rather than the data file. **[DocumentNo]** in the subject or body is replaced with the purchase order number.
Authentication:	REST page: also the sign-in used by the ShipStream connector – a **Basic** row holding the API user and key.
Inbound secret:	REST page: the key the 3PL presents when it posts files or notifications into Sage through the Channels web API. Leave it blank for a ShipStream channel that collects by polling.

> Cancellation request files have no folder setting on the FTP page. If the 3PL wants them in a particular folder, ask your Tilted consultant.

Connector page



Third Party Logistics – Connector page

Field	What it does
Files (templates, FTP, email, copy, REST end point)	The Files transport (the default).
Connector (the 3PL's own API)	Send and collect through the 3PL's system.
Connector:	**ShipStream** ("You need to choose the connector (or switch the transport back to File)").
Base URL:	The ShipStream address the 3PL gives you, for example `https://yourwarehouse.example.com/api/jsonrpc` ("You need to enter the connector's base URL as a full http:// or https:// address").
Warehouse id: and **...**	The 3PL's id for its warehouse. **...** asks the 3PL for its list and shows a drop-down to pick from. Required.
Store code: and **...**	Your store (merchant) code at the 3PL; **...** lists them.
Default ship method: and **...**	The shipping method used when an order's courier has no mapping, for example **cheapest_GROUND**; **...** lists the 3PL's methods.
Test connection	Checks the address and sign-in with one read-only request and shows "Success" or "Failed - <reason>".

The connector signs in with the **Authentication:** row on the REST end point page ("The connector uses the module's end point authentication - set a Basic (API user + key) row on the REST end point page").

> **Important:** A Connector channel sends to the 3PL **for real** whenever its upload automations run. Never point a test or training channel at a live 3PL address.

On a Connector channel the **Customisation** page offers **Value Mapping ▸ Couriers**: map each Sage courier value (the courier analysis code on the order, for example a carrier's SCAC code) to one of the 3PL's shipping methods (columns **Sage Courier** and **Shipping Method**). Opening it fetches the 3PL's shipping methods. See the Operator Guide, section 5.5, for value mappings.

Changes to Sage screens

A 3PL channel adds to these Sage screens (Operator Guide, chapter 16):

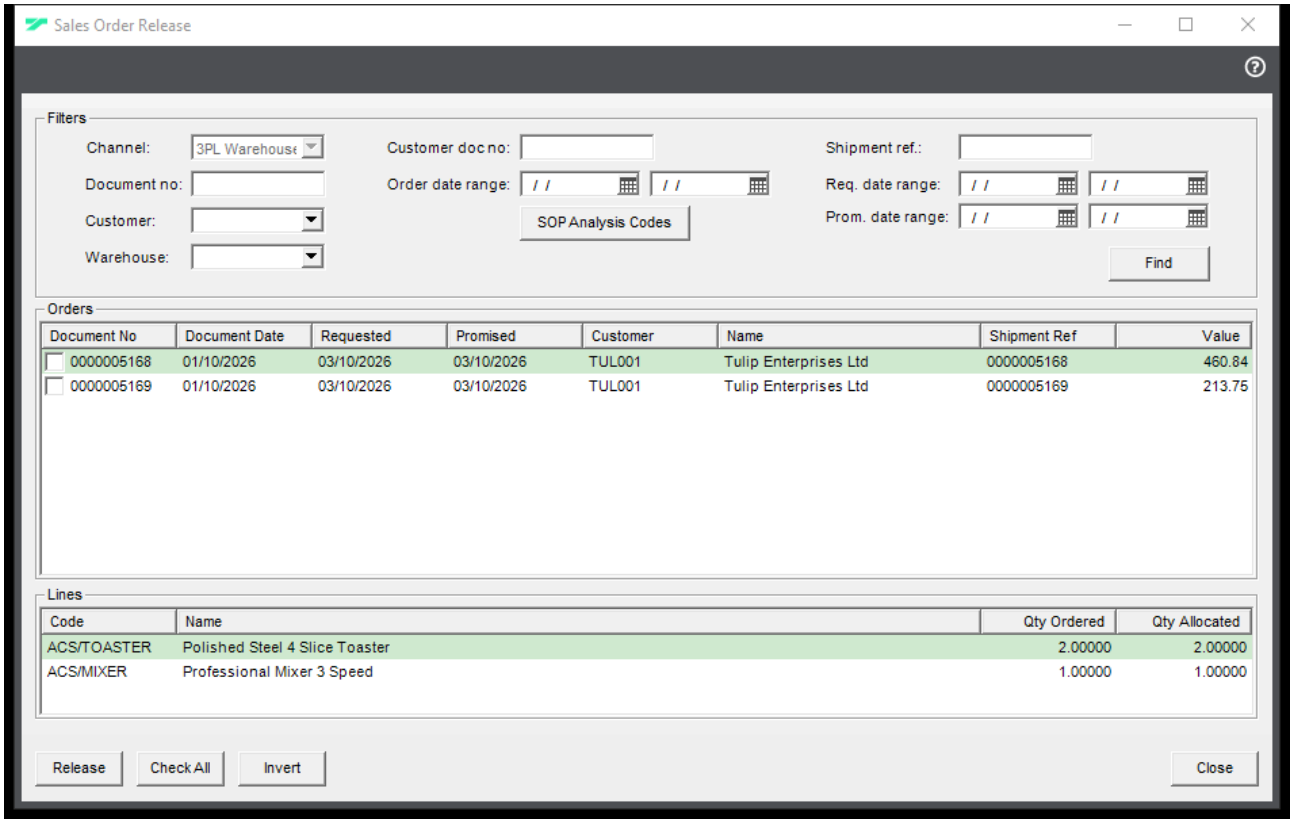
- **Sales order and sales return – Channels tab: Release to 3PL** releases whatever is waiting, asking first about a held release (naming it and why it waits) and then saying what the click did – released now, already released and waiting for the next order feed, everything already sent, or nothing for a 3PL warehouse (Operator Guide, section 16.1). On a sales order or return the **3PL Release** box above the **Events** list shows where the order stands now – its latest release: held and why, released and waiting for the feed, or sent on which feed. The **Events** list shows each release, send, acknowledgement and shipment.
- **Purchase order and purchase return – Channels tab: Release to 3PL** does the same for purchase documents.
- **Stock item – Channels tab: Default 3rd party logistics option:** (**Include** / **Exclude**) and **Included warehouses / suppliers** (**Included Warehouses**: **Add**, **Edit**, **Delete** a warehouse and supplier) decide which items a Supplier-basis 3PL supplies; **Virtual warehouse total free stock:** shows the 3PL's reported stock.

30.3 Screens

Channels ▸ Third Party Logistics has the **Manual Release** folder (**Sales Order Release**, **Sales Return Release**, **Purchase Order Release** and **Purchase Return Release**), three outbound lists (**Outbound Sales Order & Return List**, **Outbound Purchase Order & Return List**, **Outbound Sales Order Cancellation Request List**), nine inbound lists and the **Inventory Synchronisation List**. Every list shows the enabled 3PL channels, all ticked. Opening a screen only reads Sage; the 3PL is contacted only by **Download and Import** and by uploads.

Manual Release

Manual Release ▸ Sales Order Release, **Sales Return Release**, **Purchase Order Release** and **Purchase Return Release** list documents that are waiting to be released (channels with **Enable manual release for orders**, an analysis-code gate or amendments held for the button).



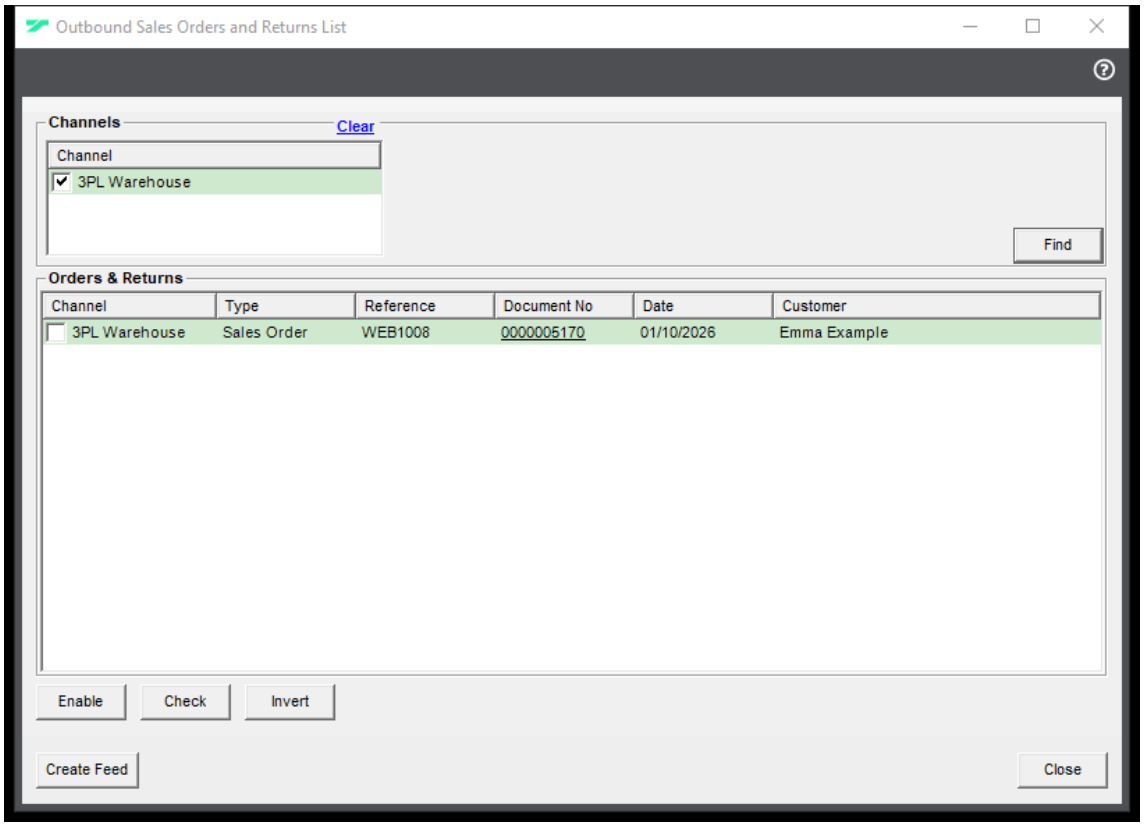
Third Party Logistics – Sales Order Release

Filter with **Channel:** (fixed when there is only one 3PL channel), **Document no:**, **Customer:** (**Supplier:** on purchase screens), **Warehouse:**, **Customer doc no:** (**Supplier doc no:**), **Order date range:** (**Return date range:** on the sales return screen), **Shipment ref.:**, **Req. date range:**, **Prom. date range:** and **SOP Analysis Codes** (filter on analysis code values; the button shows how many are set), then click **Find**.

Column	What it shows
Orders	**Document No**, **Document Date**, **Requested**, **Promised**, **Customer**, **Name**, **Shipment Ref**, **Value** (purchase screens: **Supplier**, **Send Ref**). Double-click a document to see its lines.
Lines	**Code**, **Name**, **Qty Ordered** and **Qty Last Sent** – the quantity in this release (purchase screens also show **Qty Received** / **Qty Returned**).

Button	What it does
Check All, **Invert**	Tick documents.
Release	Releases the ticked documents after "Release the selected <n> orders?". They then appear on the outbound lists, ready for **Create Feed**. Nothing is sent to the 3PL at this point.
Close	Closes the screen.

Outbound Sales Order & Return List, Outbound Purchase Order & Return List, Outbound Sales Order Cancellation Request List

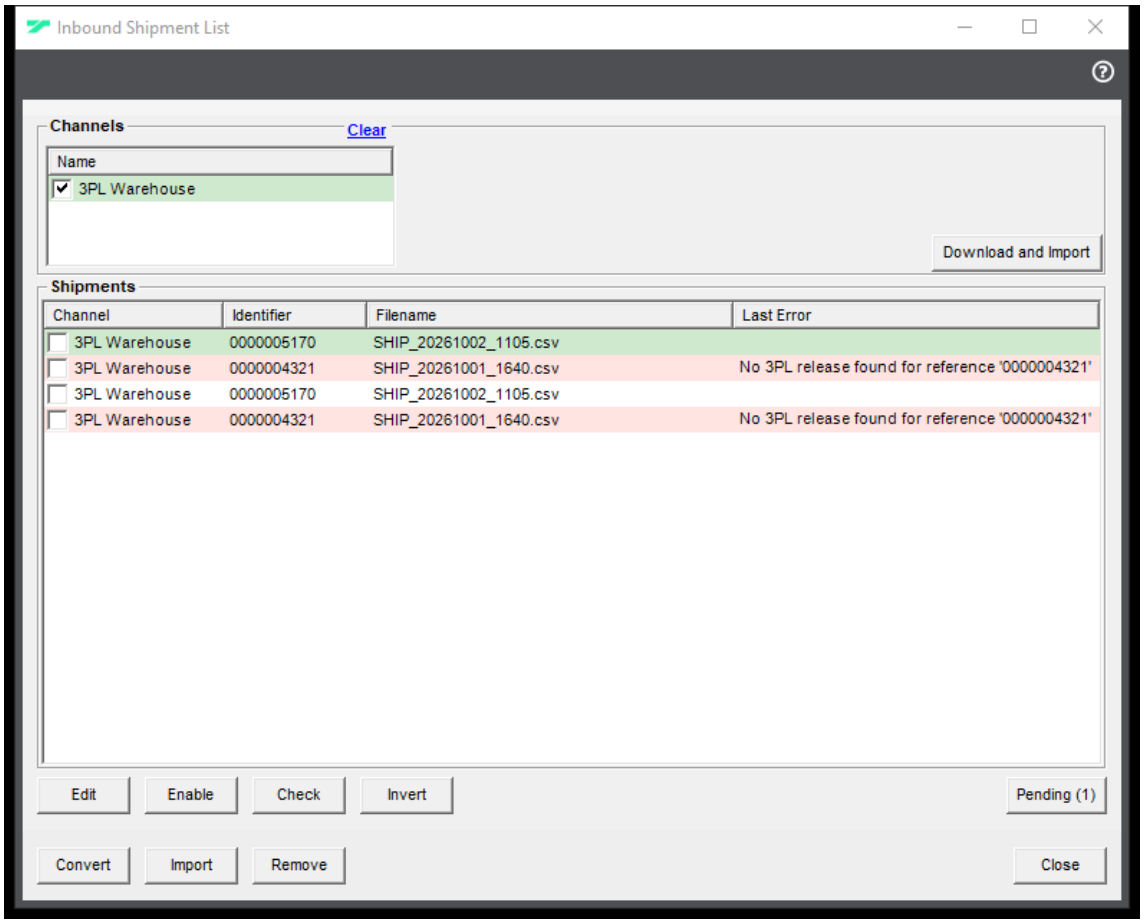


Third Party Logistics – Outbound Sales Orders and Returns List

Released documents not yet in a file (window titles **Outbound Sales Orders and Returns List**, **Outbound Purchase Orders and Returns List**, **Outbound Sales Order Cancellation Requests**). Columns **Channel**, **Type**, **Reference**, **Document No** (opens the Sage document), **Date**, **Customer**. Click **Find**, tick documents and click **Create Feed** to write one file per document (on Supplier basis this also raises the purchase order). The files are sent by **Submit** on **Channels** ▸ **Export Feeds** (Operator Guide, section 14) or by the upload automations.

Inbound lists

Inbound Sales Order Acknowledgement List, **Inbound Sales Order Shipment List**, **Inbound Sales Order Invoice List**, **Inbound Sales Return Receipt List**, **Inbound Purchase Order Receipt List**, **Inbound Purchase Return Shipment List**, **Inbound Inventory List**, **Inbound Inventory Adjustment List** and **Inbound Sales Order Cancellation Response List** hold what the 3PL has sent that has not been processed yet. They work like the shared order list (Operator Guide, sections 6.2 to 6.10).



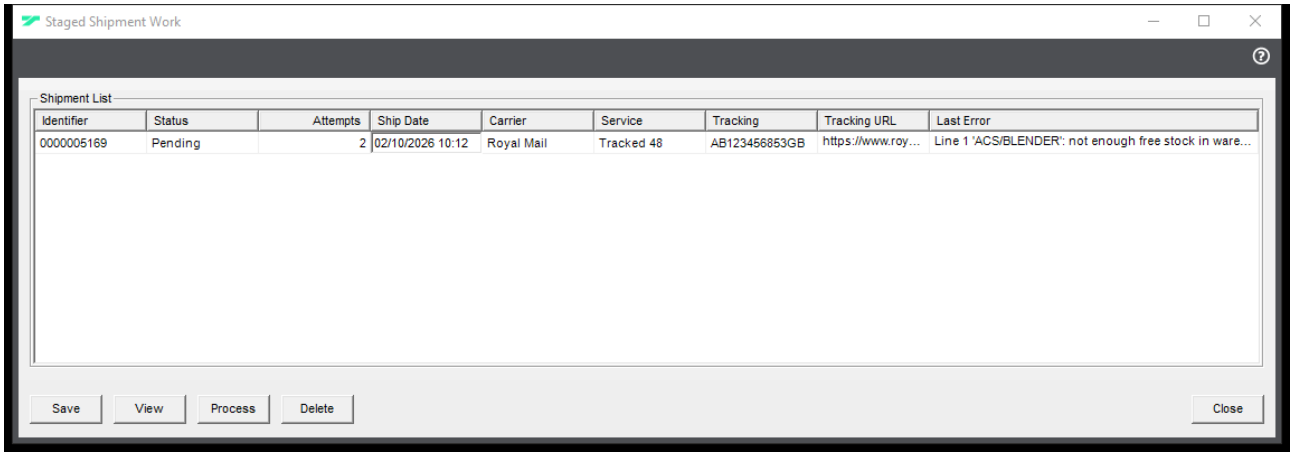
Third Party Logistics – Inbound Shipment List

Column	What it shows
Channel, **Identifier**, **Filename**	The channel, the key value (release reference, GRN …) and the file it came from. The inventory lists show the file only – one row per file.
Last Error	Why a row could not be processed last time (the row is shaded). Correct the cause in Sage and convert it again.

Button	What it does
Download and Import	File transport: collects that document's files from the FTP site and reads the channel's sub-folder for it. Connector transport: reads the new shipments, receipts or stock figures from the 3PL and turns them into rows. The 3PL is contacted.
Convert	Processes the ticked rows into Sage (despatch, goods received, return received, stock movement …). Rows processed successfully leave the list.
Import	Reads files you choose.
Edit, **Remove**	View or remove a row (Operator Guide, sections 6.9 and 6.10). **Edit** shows the document name and the values read from the file.

The **Inbound Sales Order Shipment List** has an extra **Pending (n)** button: shipments being worked through in Sage (received, allocated, despatched) that have not finished. It opens **Staged Shipment Work**.

Staged Shipment Work

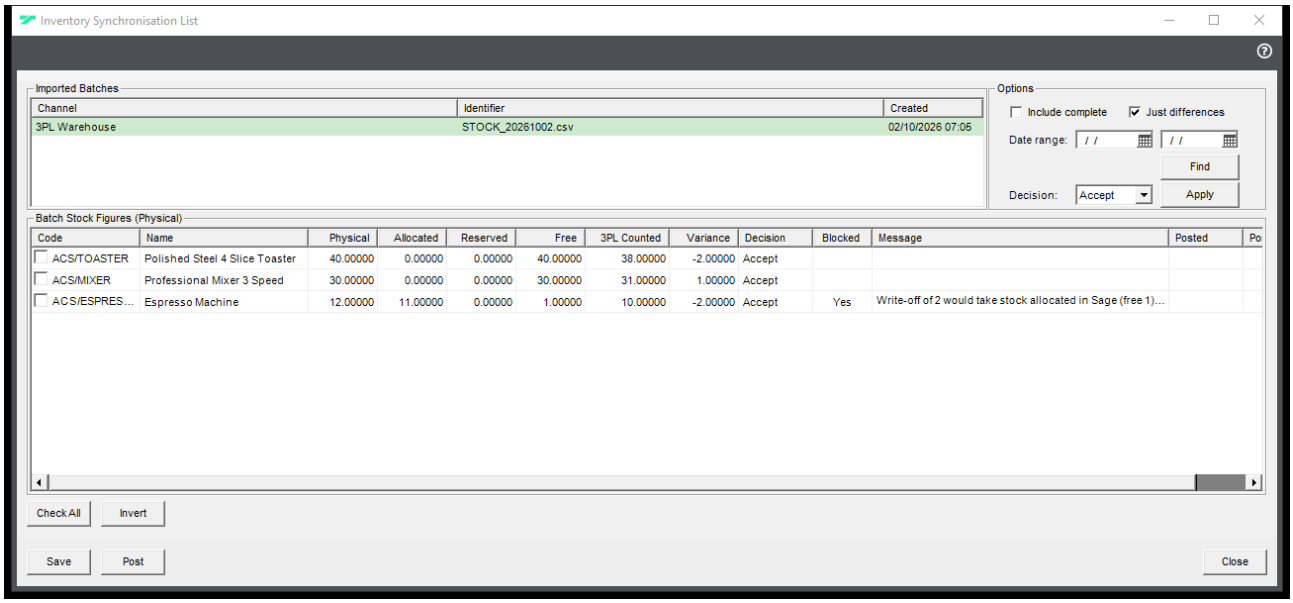


Third Party Logistics – Staged Shipment Work

Columns **Identifier**, **Status**, **Attempts**, **Ship Date**, **Carrier**, **Service**, **Tracking**, **Tracking URL** (the last five can be corrected), **Last Error**.

Button	What it does
Save	Saves corrections to ship date, carrier and tracking.
View	Opens **Staged Shipment Lines** (**Line**, **Item Code**, **Quantity**, **Carrier**, **Service**, **Tracking**, **Tracking URL**, **SSCC**, **BOL**, **Location**, **Status**, **Last Error**) to correct or **Delete** a line ("Are you sure you want to delete this staged shipment line?").
Process	Tries the shipment again now, even if it has used up its automatic attempts: receives, allocates and despatches in Sage, then invoices if the channel is set to.
Delete	Removes the staged shipment and its lines ("Are you sure you want to delete this staged shipment and its lines?").

Inventory Synchronisation List



Third Party Logistics – Inventory Synchronisation List

Each stock count file from a Warehouse-basis 3PL becomes a batch comparing the 3PL's count with Sage's **physical** stock in the 3PL's warehouse. **Imported Batches** lists the batches (**Channel**, **Identifier**, **Created**); its **Options** (**Just differences**, **Date range:**, **Include complete**) and **Find** choose which are shown. Double-click a

batch to open it in **Batch Stock Figures (Physical)**, which shows **Code**, **Name**, **Physical**, **Allocated**, **Reserved**, **Free**, **3PL Counted**, **Variance** (counted less physical), **Decision**, **Blocked**, **Message**, **Posted** and **Posted By**.

Field	What it does
Decision: and **Apply**	Set **Accept**, **Reject** or **Ignore** on the ticked rows (or change **Decision** in the grid).
Save	Saves the decisions.
Post	After "Are you sure you want to post these adjustments?", posts the accepted differences: a positive variance is added to stock, a negative one is written off to the write-off category (reference **3PL auto adjust**). The summary ends "The batch is complete." or "The batch stays open: unallocate the blocked items and post again, or set them to Ignore / Reject and post."

A write-off is **blocked** when it would take stock that is allocated or reserved in Sage (or when no write-off category is set); the **Message** column explains. Free the stock, or set the row to **Ignore** or **Reject**, and post again.

30.4 Automations

Add these to job bags (Operator Guide, section 15.4). Use only the ones for the documents you exchange.

Automation	What it does
Determine 3PL releases	Warehouse basis with **Use warehouse allocations for fulfilment requests**: picks up allocations made anywhere in Sage and releases them.
Create order feeds / Upload order feeds	Files (or ShipStream requests) for released sales orders, then send them.
Upload packing slips	Sends the packing slips.
Download new acknowledgements / Process acknowledgements	Collect and process the 3PL's acknowledgements.
Download new shipments / Process shipments	Collect shipments; process them into Sage despatches (and invoices, if set).
Download new invoices / Process invoices	Supplier basis: collect the 3PL's invoices and enter them against the purchase orders.
Create sales order cancel requests / Upload sales order cancel requests	Cancellation requests for quantity reduced after it was sent, then send them.
Download new inventory / Process inventory	Collect stock count files; build the **Inventory Synchronisation List** batch (and post it, if figures are accepted automatically). Supplier basis: update the virtual warehouse.
Download new inventory adjustments / Process inventory adjustments	Collect stock adjustment files; post each adjustment to Sage stock (Warehouse basis) or the virtual warehouse (Supplier basis).
Determine 3PL sales return releases, Create sales return feeds, Upload sales return feeds	Pick up sales return changes, then write and send sales returns.
Download sales return receipts / Process sales return receipts	Book returned goods in on the Sage returns.
Determine 3PL purchase order releases, Create purchase order feeds, Upload purchase order feeds	Pick up purchase order changes, then write and send purchase orders.
Download new purchase order receipts / Process purchase order receipts	Book goods received on the purchase orders.
Determine 3PL purchase return releases, Create purchase return feeds, Upload purchase return feeds	The same for purchase returns.
Download new purchase return shipments / Process purchase return shipments	Record goods sent back to suppliers on the Sage purchase returns.
Reconcile 3PL events	Connector transport: reads new shipments, receipts and stock figures from the 3PL.

Automation	What it does
Process 3PL events	Connector transport: turns what was read into rows on the inbound lists.

A suggested order for a ShipStream channel: **Reconcile 3PL events**, **Process 3PL events**, then the **Process …** automations, then the **Create …** and **Upload …** automations. For a Files channel: the **Download …** automations, the **Process …** automations, then the **Create …** and **Upload …** automations.

30.5 Orders

Releasing and sending sales orders (Warehouse basis)

1. A sales order is entered or imported with lines in the 3PL's warehouse. Channels works out what the 3PL should have: the ordered quantity (or, with **Use warehouse allocations for fulfilment requests**, the allocated quantity).
2. Anything not yet sent becomes a release – reference `0000012345` the first time, `0000012345/2`, `/3` for later additions. A release already sent is never changed or sent again.
3. The release is released straight away, or waits for **Manual Release**, the analysis code value, or **Release to 3PL** – depending on the General Options. With the analysis code gate, the code is set to **Released** when a release goes, so set it back to the ready value (or click **Release to 3PL**) when a later addition should go too. The release goes when the order is saved in Sage with the ready value (on **Enter New Order** or **Amend Order**). A value changed outside the Sage order screens, for example by an import, is acted on the next time the order or one of its lines is saved, or when **Release to 3PL** is clicked.
4. **Create order feeds** (or **Create Feed** on the outbound list) writes the order file; **Upload order feeds** sends it. With acknowledgements on, the Sage order goes on hold until the 3PL accepts it.
5. If a line's quantity is reduced, or the order cancelled, after the 3PL has it, Channels raises a **cancellation request** for the difference, sent by the cancel request automations (Operator Guide, section 6.13).

Restated orders (Restate orders ticked)

With **Restate orders** ticked on General Options, the 3PL always receives the whole order rather than additions and cancellations:

- The first send is made exactly as above. After that, any change – more quantity, a new line, a reduced or removed line – produces one new send (`0000012345/2`, `/3` …) that lists every line the 3PL has ever been sent, each at its current ordered quantity. A removed line stays on the order at 0.
- While a send is waiting to go, further changes update that same send, so the 3PL only ever receives the latest picture of the order.
- Cancelling the order in Sage sends it once more with every line at 0. That send is released at once, without waiting for the release settings, so the 3PL hears about the cancellation straight away.
- No cancellation requests are raised, so the **Outbound Sales Order Cancellation Request List** stays empty for this channel.
- Each new send replaces the earlier ones: anything the 3PL has already shipped is carried over to it, so later shipments and acknowledgements are matched against the newest send.
- The export feed of a restated send can be rolled back (Operator Guide, section 14.5) until the 3PL has shipped against it; after that **Roll Back** is refused.

Hand-keyed orders

The 3PL's shipments are matched back to the channel the order came from. Orders keyed by hand in Sage need a Text & Excel Files channel with **Record manually entered orders / returns** ticked (chapter 29) so that they have one; **Release to 3PL** on such an order says so if none is set up.

Supplier basis

1. Lines not covered by stock in Sage, for items marked **Include** (or listed under **Included warehouses / suppliers** for this supplier) and supplied by the 3PL's supplier account, are sent.
2. With **Raise purchase orders**, creating the order file also creates the purchase order (on hold) and reduces the 3PL's virtual stock; sending the file makes the purchase order live.
3. The 3PL's shipment receives the purchase order and despatches the sales order; its invoice is entered against the purchase order.

Purchase orders, sales returns and purchase returns (Warehouse basis)

With **Send purchase orders**, **Send sales returns** or **Send purchase returns** ticked, each document with lines in the 3PL's warehouse is sent in full when it is released; if it is changed after being sent, the latest version is sent again with the next reference (`/2`, `/3`). A cancelled or completed document is not sent. The 3PL's goods-received notes book the purchase orders in (quantity above the order is allowed, as in Sage); return receipts and purchase-return shipments are booked against the Sage returns, up to the quantity outstanding.

30.6 Inventory

- **Stock counts** (Warehouse basis): each count file becomes a batch on the **Inventory Synchronisation List**. Review and post it, or let **Automatically accept inbound inventory figures** post it. Items missing from the file are left alone.
- **Stock adjustments** (Warehouse basis): each line of an adjustment file is posted to Sage as a stock addition (a find) or a write-off to the write-off category, dated as in the file, with the file's reference (or **3PL adjust**) and the channel name as references. A line that cannot be posted is marked failed with the reason (for example an unknown item or no write-off category); a temporary problem such as not enough free stock is retried on the next runs first.
- **Supplier basis**: count and adjustment files update the 3PL's **virtual warehouse** – the stock and next-available figures your inventory feeds can use (Operator Guide, sections 9.4 and 11.1).

30.7 Shipments

1. The 3PL's shipment arrives (file, or read from ShipStream) and appears on the **Inbound Sales Order Shipment List**.
2. **Convert** or **Process shipments** matches it to the release by its reference (or, for a plain document number, to the oldest release still to ship).
3. Sage is updated in stages: each item is received (Supplier basis) and allocated, then the order is despatched with its cartons, carrier and tracking, then invoiced and posted if the Sales Options say so. Work that cannot finish waits under **Pending** and is retried on the next run.
4. On a ShipStream channel the shipping method the 3PL actually used is turned back into your Sage courier value using the courier mapping.

The resulting Sage despatch is then confirmed to the channel the order came from in the usual way (Operator Guide, chapter 13).

30.8 ShipStream (Connector transport)

1. Upload automations send sales orders, cancellations, sales returns and purchase orders to ShipStream as requests (purchase returns are not sent to ShipStream). A copy of each request and reply is kept with the export feed (Operator Guide, section 14.4).
2. **Reconcile 3PL events** reads new shipments, deliveries (receipts) and stock figures, starting from where the last read finished. ShipStream can also post notifications to the Channels web API when your server is reachable from the internet.
3. **Process 3PL events** turns them into rows on the inbound lists, laid out by the channel's inbound templates, and the usual **Process …** automations book them into Sage. **Download and Import** on an inbound list does both steps for that list.
4. With acknowledgements switched on, an order counts as accepted by the 3PL as soon as ShipStream accepts the request, and is taken off hold.

30.9 Points to note

- Agree the release reference with the 3PL: quoting it on acknowledgements and shipments matches each one to the right release.
- Releases that have been sent are never changed; reductions become cancellation requests – unless **Restate orders** is ticked, when the whole order is sent again instead (section 30.5).
- With acknowledgements switched on, orders stay **on hold** in Sage until the 3PL accepts them – look at the order's status first if an order seems stuck.
- Stock count write-offs never take stock that Sage has allocated or reserved; they are blocked until the stock is freed or the row is set to **Ignore** or **Reject**.
- Files collected from the FTP site are removed from it; copies are kept in each document's `Archive` folder. Re-importing an archived receipt books it again – only do so deliberately.
- A ShipStream channel's inbound templates must use the CSV format.
- Products are sent to a ShipStream 3PL through a Products channel, not from the 3PL channel (Operator Guide, section 12).

> **Important:** Upload automations on a Connector channel send to the 3PL straight away. Keep test and training channels on the Files transport with FTP, e-mail and end points switched off.

31. Messages by channel

Amazon

Message or symptom	What it means / what to do
“You need to setup the Tilted Amazon SpApi security settings first.”	Your Channels licence doesn't yet include the Amazon application details. Contact Tilted to have your licence refreshed.
“You need to provide a name”	Enter a **Name** for the channel on the connection page.
“You need to select a marketplace”	Choose the country of the Amazon marketplace in **Marketplace**.
“Unable to find Amazon marketplace using '…'” / “Unable to find an amazon country for '…'”	The country you chose has no Amazon marketplace that Channels supports. Choose one of the listed marketplaces, for example GB.
“You need to choose a country code”	You clicked **Authorise** before choosing a **Marketplace**. Choose it first.

Message or symptom	What it means / what to do
“You need to supply the merchant/seller identifier”	Enter your Seller Central merchant token in **Merchant ID**.
“You need to enter a refresh token by authorising the connection”	Click **Authorise**, approve Tilted Channels in Seller Central and paste the token into **Refresh Token**.
The Tilted page shows “Authorisation Failed” (“Unauthorised Request or Request Timed Out. Please Try again”)	You took more than five minutes to sign in, or refreshed the page. Click **Authorise** again.
“Click Next until this wizard closes and then you will need to amend this channel again to authorise SP-API”	You switched an old MWS channel to SP-API. Finish the wizard, amend the channel again and authorise it.
“You need to supply batch sizes greater than zero”	Enter a number above zero in all three batch size boxes on the options page.
“You need to supply a default latency”	Enter the default handling time in days in **Default Latency**.
“You need to choose a latency analysis code” / “Failed to locate latency analysis code”	Choose the stock item analysis code that holds handling times in **Latency anl code** before you click **Update**.
“Latency has been updated on all items”	**Update** has written the default latency onto every stock item. Send a full inventory feed.
“You need to provide a 'from date'” / “You need to provide an 'end date'”	Untick **New orders** only when you want to enter both dates in **Orders Between**.
Orders arrive with no delivery address or buyer name	The authorisation does not include access to buyer delivery details. Amend the channel, click **Authorise** and approve every permission requested.
An order paid for later (pending at Amazon) never appears with **New orders**	It was created before the New-orders window. Download it with **Orders Between**, or schedule **Download last 3 days orders** daily.
“There are no lines waiting to be converted, this order may have been cancelled.”	The buyer cancelled every line before download. Check the order in Seller Central and remove it from the order list.
“inventory list can only be generated for a single account”	With the original inventory method, tick just one Amazon channel before generating a list.
“Amazon listing report '…' was still not ready after … seconds (… attempts). Inventory items have NOT been changed - try again later.”	Amazon did not produce your listings report in time. Nothing was changed, so try again later.
Feed Response List **State** “Not ready”	Amazon has not processed the feed yet, or its report has not been downloaded. Click **Download** later, or let **Download feed results** run.
Feed Response List **State** “Failure”	Amazon rejected at least one message. Double-click the feed to see the **Result** for each order or SKU, correct it and send it again.
Result “Submission not found”	Amazon has no record of that submission, for example because it is too old. Create and upload the feed again if it is still needed.
Result “Failed - no submission identifier”	The feed never reached Amazon. Check the export feed's errors (Operator Guide, section 14) and upload it again.
“You need to choose some feeds”	Tick at least one feed before clicking **Download**.
“You need to select some orders” (Shipment List)	Tick the despatches to include before clicking **Create Feed**.
An “Amazon shipment report” export feed is trashed	Expected. Those despatches used labels bought through Amazon, so Amazon already has their tracking.
“You need to enter a selling party identifier”	Enter your Direct Fulfillment vendor code in **Selling Party ID**.
“You need to enter a last download date/time”	Enter the date and time (UTC) from which new orders should be downloaded in **Last order download**.
“You need to provide a 'from date'”	Enter a from date in **Orders Between**, or tick **New Orders**.
A channel is greyed out on the Converted Order List	**Acknowledgements enabled** is unticked for that channel. Tick it on the options page.
An order can't be ticked on the Converted Order List	It has already been acknowledged, or it is not fully allocated and automated rejection is off. Allocate the stock, or acknowledge it as out of stock by enabling **Automated rejection enabled**.

Message or symptom	What it means / what to do
“Failed to locate Amazon DF Warehouse using '…'”	The warehouse on the Sage order has no **Identifier**. Enter the Amazon warehouse code for it on the options page and create the feed again.
“You need to link this module to an alias group in order to determine the inventory items to upload”	Link a stock alias group holding your Amazon item codes to the channel (Operator Guide, section 9).
“Invalid number of tax summary items”	The Sage invoice has more than one VAT rate. Amazon Direct Fulfillment invoices must carry a single rate.
“You need to select some invoices”	Tick the invoices to include before clicking **Create Feed**.
An export feed for this channel shows processed with errors after **Download Transaction Results**	Amazon rejected the submission. The reason is recorded on the feed (Operator Guide, section 14). Correct it and send it again.
A Sage order was cancelled after its acknowledgement was uploaded	**Automated SOP order cancellation enabled** is ticked and the order was acknowledged as “Canceled out of stock”.

Web stores

Message or symptom	What it means / what to do
“You need to provide your store name in the url” (Shopify connection)	The **Store name:** still shows the placeholder `xxxxxx.myshopify.com`. Enter your store's address, e.g. `yourstore.myshopify.com`.
“You need to provide an access token” (Shopify)	Paste the app's Admin API access token into **Access token:**. Use **Connect** to get one (section 4.2).
“Store registration failed : …” (Register Shopify Store)	Shopify or Tilted rejected the registration. Check the store URL, client ID and secret, then try again or contact Tilted support.
“POS order handling needs the GraphQL-only client”	You chose to include POS orders without **Use GraphQL client**. Tick **Use GraphQL client** on the Options page.
“You'll need to populate the Metafield values in order to upload the next availability dates and quantities”	**Upload next available metafield values** is ticked. Enter all four keys under **NAD/NAQ Metafields**.
“The gift card item should be an SOP order item”	Choose a non-despatchable sales order item as the **Gift card item:**.
“If you're processing gift cards you will need to provide a gift card bank”	A gift card item is set. Choose the **Gift card bank:**.
“You need to choose a location” (Shopify Locations / Entities)	Pick the Shopify location whose stock this channel updates. The list comes from Shopify, so the computer must be online.
“The order download filters need the GraphQL-only client (Options page)”	Location and business entity filters need **Use GraphQL client**. Go Back and tick it.
“You need to tick at least one business entity to filter order downloads by”	Tick an entity, or untick **Only download orders for these business entities**.
“You need to provide a liability cash book account when pre-orders are enabled”	Choose the **Liability Cash Book:** on the Pre-orders page.
“You need to provide a start date” (Shopify Order List)	**New orders** is unticked and no specific order was entered. Enter the date range, or tick **New orders**.
A Shopify order line is missing from the Sage order	The line had no SKU in Shopify, or was removed by an order edit. Add the SKU in Shopify, or tick **Allow empty SKUs in order list** to keep such lines and enter the SKU before converting.
“Failed to locate stock / warehouse item using '[NULL]'”	**Allow empty SKUs in order list** is on and a line has no SKU. Edit the order (Operator Guide, section 6), enter the SKU, then convert.
A Shopify order has no receipt	The order is not yet paid (or partly refunded) in Shopify, or it is a SparkLayer order paid on account. The receipt is created once a paid order is converted.
Held Shopify orders are not downloaded	**Download held orders** is off. They are downloaded once released in Shopify.
POS sales are not downloaded	**POS orders:** is set to **Exclude POS orders**. Choose **Include POS orders**, or set up a separate channel with **POS orders only**.

Message or symptom	What it means / what to do
“Are you sure you want to refund <value> against this order?” (Shopify Refund)	Clicking Yes refunds the customer in Shopify straight away. Check the values first.
“You cannot refund a greater quantity than ordered” / “You cannot refund more than <amount>”	Reduce the refund quantity or shipping value to what remains refundable.
“Order is not from a Shopify Channel” / “Failed to locate Channels order”	The Sage order was not downloaded through a Shopify channel, so it cannot be refunded through Shopify. Refund it in Shopify directly.
“No Shopify channel has SparkLayer enabled” (SparkLayer feed lists)	Tick **SparkLayer Enabled** on the Shopify channel's SparkLayer page and enter the site details.
“Choose a Shopify channel”	Pick the channel in **Channel:** before Refresh or Create Feeds.
“Nothing to send - no SparkLayer <type> feed was created.”	Nothing has changed since the last upload, or that feed is switched off in the SparkLayer settings.
“SparkLayer <type> feed <number> created. …”	The feed was created. Upload it from Export Feeds (**Submit**) or with the matching **Upload SparkLayer … feed** automation.
Customer Feed List shows a **Warning**	Fix the customer in Sage before uploading: add an e-mail address, or map the customer's group value under **Customer Groups**.
“Failed to locate Sparklayer 'accounting_id' customer metafield”	The portal customer has no Sage account reference in Shopify. Run the SparkLayer customer feed for that customer, or link the account from the customer record (**Sparklayer Options**).
“Customer account '<reference>' does not appear to be setup as a SparkLayer customer”	The Sage account exists but is not a SparkLayer customer. Give it a customer group value and run the customer feed.
“This customer does not have a Sparklayer customer group setup” (Sparklayer Options)	Enter the customer's group in the customer group analysis code.
“Sales ledger account is linked to Shopify customer id '<id>' but this customer no longer exists on Shopify …”	The Shopify customer was deleted. Click **Delete Link**, then **Synchronise** to create it again.
“You can only have one RRP per currency”	Tick only one RRP price band for each currency in **Price Bands & Discounts**.
“You need to choose a role if you're using one to determine the email address”	Choose **Specific role:**, or untick **Use specific role for email address**.
“You need to provide a url” / “You need to provide a key” / “You need to provide a secret” (WooCommerce)	Complete the Connection page with the store address and the REST API key and secret.
“You need to supply a start date” (WooCommerce)	Enter the **Start Date:**, normally your go-live date.
“You need to provide an order id” (WooCommerce Order List)	**New orders** is unticked. Enter the WooCommerce order ID in **Specific Order:**, or tick **New orders**.
WooCommerce downloads take longer and longer	Every ‘processing’ order since the start date is checked on each download. Set an **Order downloaded status:** and run the acknowledgement automations, so that converted orders leave ‘processing’.
A WooCommerce order is not marked completed	It is completed only when the Sage order has been despatched in full.
“You need to provide an end point” / “You need to provide a token” (Magento)	Enter the store address and the integration access token (or the username and API key for Magento 1).
“You need to choose a store” (Magento Options)	Pick the store view. The list is read from Magento, so check the connection details if it is empty.
“You need to supply the last order identifier”	Enter the **Last Order Increment:** to start after.
“You need to supply batch sizes greater than zero”	Enter batch sizes of 1 or more (defaults 100, 50 and 500).
“You need to ensure that the 'auto generate account reference' setting is enabled on the Sales Ledger.”	**Use bill email to find customer** creates customers. Turn on automatic account references in Sales Ledger settings.
“You need to provide a 'from date'” (Magento Order List)	Enter the date range, or tick **New orders**.

Message or symptom	What it means / what to do
A Magento order stays in the order list	Only 'processing' orders are converted by the automation. It is converted once it reaches 'processing' in Magento, or you can remove it from the list.
Magento stock is not updated	Tick **Allow Inventory Feed** on the Options page, and take an inventory snapshot before creating the feed.
"Make sure you enter the version number in the URL" (SquareSpace)	Replace `{api-version}` in **URL:** with the API version, e.g. `https://api.squarespace.com/1.0/commerce/`.
"You need to provide an Auth Token"	Paste the Squarespace API key into **Auth Token:**.
"You need to provide a date or an order number" (SquareSpace Order List)	Tick **New orders**, enter both dates under **Orders Between:**, or enter the order ID in **Specific Order:**.
A SquareSpace order cannot be found by number	**Specific Order:** takes the Squarespace order ID (the long ID in the order's web address), not the order number.
"You need to provide a email address" / "You need to provide an API key" (CS-Cart)	Enter the CS-Cart administrator's e-mail address and API key.
"You need to enter a company id if the connection is for a specific company"	**Specific Company:** is ticked. Enter the storefront or vendor ID.
"You need to specify the last order id"	Enter the **Last Order ID:** (the last CS-Cart order you do not want in Sage).
"Shipping Methods have been refreshed"	The CS-Cart shipping methods were downloaded. Map them to your Sage shipping services on the Customise page.
A CS-Cart despatch cannot be ticked on the Shipment List	Its shipping service is not mapped to a CS-Cart shipping method, or the carrier/tracking is missing. Complete the shipping service mapping.
CS-Cart orders are not downloaded	Only orders with the status Processed are downloaded, and only those numbered above **Last Order ID:**. Check the order status and the Last Order ID.
"<n> feeds have been successfully generated." (any Shipment List)	The shipment feeds were created. Upload them from Export Feeds or with **Upload shipment feeds**.
"<n> feeds raised errors whilst processing, check Export Feeds / Errors to resolve."	Some despatches could not be added to a feed. Open Export Feeds and look at the feed's errors (Operator Guide, section 14).
"You need to select some orders" (Shipment / Converted Order List)	Tick at least one row before clicking **Create Feed**.

eBay, Etsy, Temu and other marketplaces

Message or symptom	What it means / what to do
"You need to setup the Tilted Ebay security settings first."	(eBay) The eBay developer keys that come with your Tilted licence are missing. Contact Tilted to have them added to the licence.
"Please ensure you authorise first"	(eBay wizard) **Request Token** was clicked before **Sign In**. Click **Sign In**, approve in the browser as the seller, then click **Request Token**.
"You need to provide the token"	(eBay wizard) **Token:** is empty. Use **Sign In** and **Request Token** to fill it.
"You need to supply batch sizes greater than zero"	(eBay wizard) Enter numbers above zero in **Order Download Batch Size:** and **Shipment Batch Size:**.
eBay orders stopped downloading after many months	The eBay user token has expired (they last about 18 months). Edit the channel, click **Sign In**, then **Request Token**.
An eBay order was converted **On Hold** with no receipt	eBay did not report the payment as cleared, or the payment method is not one treated as paid. Check the order in eBay before releasing it.
"You need to enter the Etsy app keystring first"	(Etsy wizard) Enter **Keystring:** before clicking **Connect Etsy Account**.
"Use 'Connect Etsy Account' first"	(Etsy wizard) **Complete Connection** was clicked before starting a connection. Click **Connect Etsy Account** first.

Message or symptom	What it means / what to do
“Paste the code shown in your browser into 'Auth Code' first”	(Etsy wizard) Copy the connect code from the browser page into **Auth Code:**.
“The pasted connect code is from a different connect attempt - click 'Connect Etsy Account' again and paste the new code it produces”	(Etsy wizard) The code belongs to an earlier attempt. Click **Connect Etsy Account** again and use the new code.
“Etsy code exchange failed (…)”	(Etsy wizard) Etsy refused the code – it may have expired or the keystring/secret is wrong. Check both and connect again.
“Connected, but the shop details could not be fetched: …”	(Etsy wizard) The connection worked but the shop lookup did not. Choose the shop on the Options page with **Search:**.
“The Etsy account is not connected yet - use 'Connect Etsy Account' to authorise before downloading orders.”	(Etsy wizard) A reminder only. Nothing is downloaded until the connection is completed.
Etsy **Status:** shows **ReconnectRequired** or **Revoked**	The Etsy sign-in has lapsed or been withdrawn by the shop owner. Edit the channel and click **Reconnect Etsy Account**. Schedule **Refresh Etsy Tokens** weekly to keep a quiet shop connected.
“Etsy shared secret is empty - since 09/02/2026 Etsy requires …”	Etsy now needs the app's shared secret on every request. Enter it in **Shared Secret:** on the connection page.
“Etsy inventory upload is not implemented: …”	By design, Channels does not send stock to Etsy; the stock feed is for review only. Update Etsy quantities in Etsy.
“You need to enter an end point” / “… an app key” / “… a secret key” / “… an access token”	(Temu wizard) Fill in the missing connection detail.
“You need to provide a date or an order number”	(Temu Order List) Tick **New orders**, enter dates, or enter a **Specific order:**.
Temu requests fail even though the keys are right	Temu only accepts requests from approved internet addresses. Ask Tilted to register the address of the server running Channels with Temu.
“Skipped order '<order>' - <reason>” (log)	(Temu) Temu would not release the delivery details – usually because the order is cancelled or unpaid. No action needed.
“Failed to locate Temu carrier identifier for '<courier>'”	(Temu shipments) The despatch's courier is not mapped to a Temu carrier name. Refresh **Carriers** on the channel and map the courier.
“Failed to locate Temu warehouse for line and no default warehouse setup”	(Temu shipments) Link the Sage warehouse to a Temu warehouse in **Warehouses**, or make sure Temu has a default warehouse.
“Carriers have been refreshed” / “Warehouses have been refreshed”	(Temu, Marketplacer) The list was downloaded. Courier mappings for carrier names that no longer exist have been removed – review your courier mapping.
“You need to provide a token”	(Mirakl wizard) Enter the shop's **API Key:**. (Groupon wizard) Enter the supplier **Token:**.
“You need to confirm the shop”	(Mirakl wizard) Click **...** beside **Shop:** to check the connection and fetch the shop name.
“You need to select a retail price band for inventory / price updates”	(Mirakl wizard) Choose the VAT-inclusive **Price Band:** used for offer prices.
“You need to set the promotional price to be different to the standard”	(Mirakl wizard) **Promotion Price Band:** must not be the same as **Price Band:**.
“The promotional price band should be a 'Limited' price band”	(Mirakl wizard) Choose a Sage price band of type Limited for promotions.
“You need to provide a 'from date' or an order number”	(Mirakl Order List) Tick **New orders**, enter dates, or enter an order number.
A Mirakl order is in the back office but not downloaded	Channels only downloads orders once they are accepted and ready to ship. If it was accepted long after it was placed, run a dated **Find** with **Just 'Shipping'** ticked, or increase **Hours to check back :**.
“You need to provide a 'from date'” / “You need to provide an 'end date'”	(eBay, Etsy, Marketplacer Order Lists) Enter the missing date, or tick **New orders**.

Message or symptom	What it means / what to do
“You need to provide a username” / “You need to provide a password”	(Marketplacer wizard, with **Staging** ticked; Mano Mano wizard) Enter the login.
“You need to provide an API Key”	(Marketplacer, Kornit wizards) Enter the API key.
“Failed to locate Marketplacer carrier using '<courier>'”	(Marketplacer shipments) The despatch's courier does not match a Marketplacer carrier name. Refresh **Carriers** and map the courier.
Mano Mano orders not accepted	Orders are accepted after they are converted: run **Create Acknowledgement feeds** and **Upload Acknowledgement feeds**, or **Create Feed** on the Converted Order List.
“You need to provide a key” / “You need to provide a secret”	(Wowcher wizard) Enter the API key and secret Wowcher gave you.
“You need to select a permalink analysis code”	(Wowcher, Groupon wizards) Choose a Sage sales analysis code on the Options page.
“Feed batch size must be a number between 1 and 1000”	(Wowcher, Groupon wizards) Enter a batch size from 1 to 1000.
Wowcher lines have no price	Wowcher does not send prices. Set up a price for the **WOWCHER** customer in Sage.
“You need to provide a supplier identifier”	(Groupon wizard) Enter your Groupon **Supplier ID:**.
“You need to select an invoice folder”	(Groupon wizard) **Generate invoice PDFs** is ticked – choose an **Invoice Folder:**.
“Not ready for invoicing”	(Groupon Ready to Invoice, item message) The Sage order cannot be invoiced yet – usually not fully despatched. Despatch it, then process a new batch for it.
“Failed to locate original group on order”	(Groupon Ready to Invoice, item message) The order number in Groupon's file was not downloaded into Channels. Download it (Order List, **Orders Dated:**) and convert it first.
“Failed to locate Sage SOP order”	(Groupon Ready to Invoice, item message) The Channels order has no Sage sales order. Check that it was converted.
Item status **Previously Invoiced**	(Groupon) The order had already been invoiced in Sage; it is not invoiced again.
“<n> orders have been invoiced”	(Groupon) Processing finished; check **View Items** for any errors.
“You need to provide a url” / “You need to provide a company reference”	(Kornit wizard) Fill in the Kornit X **URL:** and **Company Ref:**. (NOTHS wizard) Fill in **URL:**.
Kornit X reports that orders are refused because the channel “is not enabled”	Tick **Enabled** on the Kornit channel.
A Kornit X order has not arrived	Kornit X sends orders to Channels; nothing can be downloaded. Check that the Web API is running and the channel is enabled, then ask Kornit X to resend the order.
“You need to provide a token”	(NOTHS wizard) Enter the NOTHS API **Token:**.
NOTHS despatches cannot be ticked on the Shipment List	NOTHS needs **Courier**, **Tracking** and **URL** on every despatch. Fill in the URL or use **Generate Tracking URLs**.
NOTHS orders not accepted automatically	Automatic acceptance needs **Automatically accept orders** ticked, **Accepted** ticked on the Order List, a current stock snapshot, and free stock above **Free Buffer:** for every item. Orders whose expected delivery date is before tomorrow are left for you to accept on NOTHS.
“Importing values into this form will remove all existing values….”	(NOTHS Pricing) A warning before **Import** – the file replaces every row.
“Not enough values on line <n>” / “Percentage does not appear to be numeric on line <n>” / “Code '<code>' is duplicated”	(NOTHS Pricing import) Correct that line of the CSV file (two columns: code, percentage; no heading row) and import again.
“You need to provide an end point”	(Wowcher, Groupon, Mano Mano, Mirakl, Marketplacer, ConnectWise wizards) Enter the API address.
“You need to provide a public key” / “… a private key” / “… a client id” / “… a company id”	(ConnectWise wizard) Fill in the ConnectWise API member keys, client ID and company ID.

Message or symptom	What it means / what to do
“The Id needs to be an integer”	(ConnectWise Order List) **Specific order Id:** must be the numeric ConnectWise sales order ID.
ConnectWise orders you did not expect appear	Every sales order with an ID above **Last imported order identifier:** is downloaded, whatever its status. Remove the ones you do not want, and set the identifier when you first connect.
“Order identifier is not numeric” (feed error)	(Etsy shipments) The order did not come from Etsy's receipt download. Check the order's channel.

Multichannel platforms and retailers

Message or symptom	What it means / what to do
Channel Advisor: “You need to choose a profile”	Click **...** next to **Profile ID:** to list the profiles, then choose one before leaving the Connection page.
Channel Advisor: “Failed to refresh access token”	Channel Advisor did not accept the application ID, shared secret or refresh token. Check all three on the Connection page; a refresh token stops working if the seller withdraws the application's access.
Channel Advisor: “You need to supply a distribution centre” / “You need to refresh the distribution centre list and re-select the appropriate one”	Click **...** next to **Distribution Centre:** and choose the distribution centre from the list – typing the code is not enough.
Channel Advisor: “You need to supply a start date”	Enter the **Start date:** on the Options page; orders created before it are never downloaded.
Channel Advisor: “You can only choose one default warehouse” / “You need to choose a default warehouse”	In Distribution Centre Mapping mark exactly one row **Default**; a default is required when **Use default where DCs are split and sufficient free stock** is ticked.
Channel Advisor: “There are no mapped warehouses”	The channel uses D/C mapping but no distribution centre has a Sage warehouse. Map at least one in Distribution Centre Mapping.
Channel Advisor: “Failed to locate CA DC mapping for '...'”	A stock feed was built for a warehouse that is not mapped to a distribution centre. Map the warehouse, or generate the list for a mapped one.
Channel Advisor: “You need to provide a date or an order number”	On the Order List tick **New orders**, enter **Orders between:** dates, or enter a **Specific CA order:** before clicking **Find**.
Channel Advisor: “Failed to locate any linked transactions to determine refund bank account” / “Failed to locate original receipt entry for refund payment transaction”	An adjustment (refund) could not be booked because the order has no receipt recorded through Tilted Retail. Record the refund in Sage by hand and remove the adjustment.
Channel Advisor: “Attempt to cancel items on order failed as the line has been despatched.”	A cancellation arrived for a line already despatched. Deal with it as a return.
Channel Advisor: “Product export feed did not return any results after 5 minutes so aborting”	Channel Advisor did not finish the product export in time. Run the inventory feed again later.
Channel Advisor: “The source for this order only allows full refunds”	Amazon orders can only be refunded in full – tick every item in the Channel Advisor Refund dialog.
Channel Advisor: “You need to choose some items to refund”	Tick at least one item in the Channel Advisor Refund dialog.
ChannelEngine: “You need to provide an end point, e.g. https://yourcompany.channelengine.net/api”	Enter your ChannelEngine API address on the Connection page.
ChannelEngine: “You need to provide an API key”	Enter the merchant API key created in ChannelEngine.
ChannelEngine: “You need to select a price band for stock / price updates”	Choose the **Price Band:** whose prices are sent to ChannelEngine.
ChannelEngine: “You can only choose one default stock location”	Mark only one row **Default** in Stock Location Mapping.

Message or symptom	What it means / what to do
ChannelEngine: “Failed to locate ChannelEngine stock location mapping for '…'”	A stock feed was built for a warehouse that has no stock location mapped. Map the warehouse in Stock Location Mapping.
ChannelEngine: “You need to provide a 'from date' or an order number”	Tick **New orders**, enter **Orders Between:** dates or a **Specific Order:** number before clicking **Find**.
StoreFeeder: “You need to provide a supplier identifier” / “You need to provide a warehouse name”	Enter your **Supplier Code:** and the retailer's **Warehouse:** name on the Options page. If they are entered, check them with the retailer – Channels looks both up in StoreFeeder when you leave the page.
StoreFeeder: “You need to choose 1 StoreFeeder channel”	On Raise Purchase Orders tick exactly one StoreFeeder channel.
StoreFeeder: “n Purchase Orders Raised. There were some errors…”	Some purchase orders could not be created or their sales orders could not be marked as downloaded; the reasons are listed. Check them in StoreFeeder before running again.
StoreFeeder: “Failed to locate ProductID attribute for '…'”	The order line has no StoreFeeder product ID, so the purchase order cannot be booked in. The order was not downloaded from StoreFeeder – book it in by hand in StoreFeeder.
StoreFeeder: “Customer account '…' does not exist” / “Warehouse '…' does not exist”	**Generate Backorder Allocations** needs **Customer Account Number** and **Default Warehouse** mapped as fixed values that exist in Sage.
Virtual Stock: “You need to provide a REST username” / “…REST URL” / “…REST password”	With **REST API version** ticked all three REST fields are required.
Virtual Stock: “Virtual Stock FTP or SFTP only works with ports 21 and 22”	Set the FTP connection's port to 21 (FTP) or 22 (SFTP).
Virtual Stock: “Retailer record does not exist for '…' and there are no retailer records setup for all customers”	An invoice could not be sent because the customer has no retailer ID. Add the customer (or an **All customers** row) in **Retailers** and create the invoice feed again.
Virtual Stock: “You need to select a customer”	In **Retailer** choose a customer or tick **All customers**.
Virtual Stock: orders missing from the Delivery Booked List	Only orders with a booked delivery date are listed. Dates come from a delivery-booking add-on, or type them into the grid.
Very: “You need to provide the supplier identifier”	Enter your Very **Supplier identifier:** on the Connection page.
Very: “You need to select an ftp connection”	Tick **FTP Enabled** only after choosing the **Connection:**.
Very / Dunelm: acknowledgement feed set aside with “Stock Unavailble or Unavailable for Requested Delivery Date, feed trashed as manual confirmation required.”	The order has stock lines that are not allocated and no stock is due before the requested delivery date. Confirm or reject the order with the retailer yourself.
Very: “Failed to locate channels order/multi-line order using order number '…'”	A cancellation request names an order that is not in Channels yet. Check the order with Very.
Wayfair: “The Warehouse ID needs to be numeric”	Enter your Wayfair warehouse ID as a number.
Wayfair: “All selected modules need the same 'Acknowledge printed orders only' setting”	On the Converted Order List tick only channels that share the **Acknowledge orders only once printed** setting.
Wayfair: “Castlegate channels cannot create inventory feeds” / “Castlegate channels cannot process cancellation requests”	These automations are for drop-ship channels. Remove them from the Castlegate channel's job bag.
Wayfair: “Wayfair inventory list can only be generated for a single account”	Tick one Wayfair channel on the Inventory List.
Wayfair: “Failed to locate Order '…' for shipping, removing from order store”	Wayfair reported a Castlegate shipment for a purchase order that is not in Sage. Check the purchase order in the Wayfair portal.
Wayfair: “Failed to locate item '…' on Wayfair order '…'”	A cancellation request names an item that is not on the Sage order. Answer it in the Wayfair portal.
Dunelm: “Failed to locate Reference attribute for at least one line”	An order line has no Dunelm line reference, so its status cannot be sent. Check the order in the Dunelm portal and contact Tilted support.
The Range: “You need to provide an end point” / “You need to provide a username”	Complete the Connection page.

Message or symptom	What it means / what to do
The Range: a shipment cannot be ticked on the Shipment List	**Earliest Delivery**, **Latest Delivery** and **Service** are empty: add the courier's row in **Delivery Services**, and make sure the carrier and tracking are filled in.
The Range: older orders not found with **Unacknowledged**	Only the last seven days are searched. Use **Orders From:** or **Specific Order:**.

EDI

Message or symptom	What it means / what to do
“You need to provide a name” / “You need to provide a GLN”	EDI wizard, Connection page: enter the channel name and your GLN or X12 interchange ID.
“You need to select an ftp connection”	FTP page: **FTP Enabled** is ticked but no **Connection:** is chosen. Choose one, or untick FTP Enabled if files are exchanged through local folders.
“You need to choose a grammar”	EDI Customer: choose **EDIFact**, **Tradacoms** or **X12** in **Grammar:**.
“You need to select a customer” / “You need to select an analysis code”	EDI Customer: choose the Sage account (Customer) or the analysis code (buying group).
“You cannot have multiple EDI accounts for the same Sales Ledger account.”	That Sage account is already an EDI customer, on this or another EDI channel. Edit the existing EDI customer instead.
“You cannot automatically generate acknowledgements and wait for the order acknowledgement to be printed”	Acknowledgements tab: tick only one of **Automatically generate and upload acknowledged order feed** and **Only generate acknowledgement after SOP order acknowledgement printed**.
“You need to provide the last shipment number” / “…last invoice number” / “…last credit note number”	Enter the last despatch, invoice or credit note already dealt with for this partner (or use **Pick Start**); Channels picks up documents after it.
“Selected order has not been despatched.” / “Selected order has not been invoiced.” / “Selected return order has not been credited.”	**Pick Start**: choose an order that has the document you want to start from.
“Please enter a GLN” / “Please choose a delivery address”	Location: enter the delivery point GLN and click **...** to choose the Sage delivery address.
“There are no customers with the selected analysis code / value”	Locations of a buying group: no Sage account carries the group's analysis code value yet. Set the value on the member accounts first.
“Unknown EDI file type processing <file>”	A file in the channel's import folder does not start with UNA, UNB, STX or ISA. Remove anything that is not an EDI file from the folder; check with the sender if it should have been an EDI file.
“Failed to locate enabled EDI Customer using GLN '…'”	The sender of the file is not the **Route GLN:** of an enabled EDI customer on this channel. Check the Route GLN, tick **Enabled**, or add the partner.
“Failed to locate enabled EDI Customer using Invoice GLN '…'”	The channel matches by invoice GLN and no enabled EDI customer has this **Invoice GLN:**.
“Customer '…' is not setup for incoming orders”	Tick **Incoming orders enabled** on the partner's Orders tab, then convert the order again.
Order not converted; log shows “Order blocked as delivery address record does not exist based on provided NAD+DP GLN '…'”	**Block if delivery address missing** is ticked and the delivery point GLN is not under **Locations**. Add the location, then convert again.
Log shows “Order '…' is an order change and can only be processed manually for '…'”	**Order changes only processed manually** is ticked: convert the change yourself from the Order List.
Log shows “… appears to be a duplicate”	The partner sent a purchase order that has already been converted. Check with the partner, then remove it from the Order List.
Log shows “… is a modification but the original order doesn't exist”	An order change arrived for an order that has not been converted. Convert the original order first, then the change.

Message or symptom	What it means / what to do
Order change rejected: “Order has despatched lines; change cannot be applied.”	Part of the order has already been despatched, so the change was not applied and the partner is told it was rejected. Agree the change with the partner and amend the Sage order by hand if needed.
Log shows “Skipped '…' on '…' as item not found” / “…as item inactive”	**Skip invalid or discontinued items** left out a line whose item is missing or inactive in Sage.
“Failed to locate EDI Customer record for shipment number '…'” / “…for invoice/credit number '…'”	The despatch or invoice belongs to a Sage account that is not set up as an EDI customer (or buying-group member) on this channel.
“No carrier code mapping for '…' on EDI customer '…' — add it under Carriers on the EDI Customer, or untick 'Block feed on missing carrier code mapping'.”	The despatch's courier has no row under **Carriers** for this partner. Add the row, then regenerate the feed.
“Failed to find class '…'”	The **Class:** chosen on the partner's document tab no longer exists – usually the custom assembly has changed. Choose the class again or contact Tilted.
“Failed to load assembly …, you need to ensure it is available to the application”	**Use custom assembly** is ticked but the custom assembly in Settings cannot be found from this PC. Check **Custom assembly:** on **Settings** ▸ **General** and that the share is reachable.
“<n> feeds raised errors whilst processing, check Export Feeds / Errors to resolve.”	Some outbound files could not be created. Open Export Feeds, select the feed and read its errors (Operator Guide, section 14).
“1 of 2 module(s) failed: …” after Download and Import	One EDI channel could not download (for example the FTP server was unreachable); the others were imported. Check the FTP connection of the channel named.
Partner says it received the same control number twice	A **Next batch number** was changed. Agree the next number with the partner and set it on the document tab.
Partner reports interchanges marked as test	**Testing** is still ticked on that document tab – untick it at go-live.

Text & Excel Files and Third Party Logistics

Message or symptom	What it means / what to do
“You need to provide a name”	Enter a channel name on the Connection page.
“You need to select a key field”	The template page has columns but no **Key Field:** – choose the column that identifies an order.
“The key field '…' is not in the new template. Choose a key field before leaving this page.”	The template you loaded no longer has the old key column – pick the key again.
“It looks as though you haven't set up the key field for this import template”	A file was imported for a template with no key field. Open the channel's wizard, choose the **Key Field:** on the template page and import again.
“No data found in chosen file”	The Excel workbook has no readable sheet / rows. Check the file and the **Header Row:** setting.
“You need to enter a delimiter” / “You need to select the encoding” / “You need to enter a password”	Complete the format fields in the template's **Options** dialog.
“You need to select an ftp connection”	**FTP Enabled** is ticked but no connection is chosen.
“You need to enter the default end point URL (or turn the default end point off)” / “The default end point URL needs to be a full http:// or https:// address”	Complete or untick the default end point on the REST end point page.
“You need to select some orders” / “You need to select some invoices” / “You need to select some credit notes”	Tick rows before **Create Feed**.
An order stays on the **Order List** after **Process orders**	The order number is already in Sage (a duplicate). Remove it, or tick **Allow duplicates** if the sender genuinely re-uses numbers.

Message or symptom	What it means / what to do
A file in the channel's folder is not imported	The file cannot be read with the template's format (wrong delimiter, columns or nodes) – check the Channels log, correct the file or template and run **Download and Import** again.
Values land in the wrong fields	The incoming CSV/Excel columns are not in the template's order – load a new template from a current file.
"To create a 3PL record for this order you will need to enable manual order entry on a Text File channel and ensure the customer is enabled for linked manual orders to channels."	Tick **Record manually entered orders / returns** on one Text & Excel Files channel and make sure the customer does not have **Disable recording of manual orders / returns** ticked.
"You need to choose the connector (or switch the transport back to File)"	Choose **ShipStream** in **Connector:** or select the Files transport.
"You need to enter the connector's base URL as a full http:// or https:// address"	Enter the full ShipStream address the 3PL gave you.
"You need to enter the 3PL's warehouse id (the "..." beside it lists them)"	Enter the warehouse id, or click **…** to pick it from the 3PL's list.
"The connector uses the module's end point authentication - set a Basic (API user + key) row on the REST end point page"	Add a Basic authentication row with the API user and key on the REST end point page.
Test connection shows "Failed - <reason>"	Address, user or key wrong, or the 3PL's server unreachable – check the details with the 3PL.
"The 3PL returned no warehouses / stores / shipping methods - type the value instead"	The 3PL account has none set up yet; type the value the 3PL gives you.
"The 3PL's shipping methods could not be listed, so type the method key instead (…)"	The Couriers mapping could not reach the 3PL; type the method keys.
"You need to choose a packing slip renderer"	**Generate and send packing slips** is ticked – choose a **Renderer:**.
"Please save this channel before applying default analysis codes" / "… before mapping analysis codes"	Finish the wizard once, then reopen it to set the purchase order analysis codes.
"Release on analysis code is enabled but analysis code is not setup"	**Auto release based on analysis code value** is on but the analysis code no longer exists – choose it again on General Options.
"3PL shipping charge enabled but additional charge not selected"	Choose the **Additional charge:** on the supplier shipping page, or untick the option.
"3PL module '…' has no sales return file options - set up the Outbound Sales Return template" (or purchase order / return)	Load the outgoing template for that document before sending it.
A sales order stays **On Hold**	Acknowledgements are on and the 3PL has not accepted the order yet (or rejected it – see the order's Channels events).
Nothing appears on the outbound list	The release is waiting: manual release, the analysis code value, or an amendment held for **Release to 3PL**. Use **Manual Release** or the button on the order.
A later addition to an order is not sent (analysis code gate)	Releasing set the analysis code to **Released**; set it back to the ready value or click **Release to 3PL**.
"Failed to locate outbound order awaiting shipment with identifier '…'"	The shipment quotes a reference that was never sent to this 3PL – check the reference with the 3PL.
"Failed to locate originating sales order"	The order was keyed by hand and is not linked to a channel – set up a Text & Excel Files channel with **Record manually entered orders / returns** (and use **Release to 3PL** to link existing orders).
"Supplied item code is empty" / "Supplied quantity is empty" / "Supplied quantity is not a number : '…'" / "Shipment date '…' is not a date"	The 3PL's shipment file is incomplete or the template mapping is wrong (map **ItemCode**, **ShippedQuantity**, **ShipmentDate**).
"Unexpected item code '…' for purchase order '…'"	The 3PL shipped or invoiced an item that is not on the raised purchase order (Supplier basis) – check aliases and supplier part numbers.

Message or symptom	What it means / what to do
“Failed to locate outbound order awaiting acknowledgement with identifier '…'”	The acknowledgement quotes an unknown reference.
“No acknowledgement response field mapping”	Map the **AcknowledgementResponse** field on the Inbound Sales Order Acknowledgement template.
“Purchase order '…' not found” / “Purchase order '…' is not live (…)”	The receipt names a purchase order that does not exist or is complete / on hold in Sage.
“Row n: supplied GRN is empty” (also purchase order number, item code, quantity, receipt date)	The receipt file is missing a mapped value on that row.
“Sales return '…' not found” / “Purchase return '…' not found”	The receipt or return shipment names an unknown Sage return.
“No POP order setup for '…'”	A 3PL invoice arrived for an order with no raised purchase order (invoices are for Supplier basis with **Raise purchase orders**).
Inventory sync row **Blocked**: “write-off of n blocked: only n free (physical …, allocated …, reserved …) against a 3PL count of n”	The write-off would take allocated or reserved stock. Unallocate, or set the row to **Ignore** / **Reject**, then **Post**.
Inventory sync row **Blocked**: “write-off of n blocked: no write-off category configured on the module”	Set **Write off category:** on Inventory Options and post again.
Staged shipment marked **Failed**	It used up its automatic attempts – correct the cause shown in **Last Error** and click **Process** on **Staged Shipment Work**.
Rows with a **Last Error** stay on an inbound list	Processing failed; fix the cause in Sage (or the mapping) and **Convert** again.
“3PL release '…' cannot be rolled back: shipments have been recorded against it”	**Restate orders** channel: the 3PL has already shipped against this send, so its feed can no longer be rolled back. Send any correction as a change to the order – the next send restates it.

Messages that every channel can show – converting orders, export feeds, job bags and licensing – are listed in the Operator Guide, chapter 18 (Troubleshooting).