

Tilted Channels

Operator guide: connecting Sage 200 to marketplaces, web stores, EDI partners and warehouses

Version 1.0 · October 2026 · Applies to the Channels addon for Sage 200, version 25.1.26.608. Each channel's own settings and screens are described in the companion **Channels – Channel Reference**.

	Contents
1	What Channels does
2	Before you start – installation, licence, menus, permissions, set-up order
3	The Settings screen
4	Channels – the Channel List and the connection wizard
5	Channel options and mappings
6	Orders – downloading, checking and converting to Sage
7	Customers
8	Web hooks and the Channels API
9	Stock aliases, bundles and virtual warehouses
10	Actions and customer groups
11	Inventory and stock feeds
12	Products
13	Shipments, tracking, invoices and credit notes
14	Export feeds
15	Job bags, automation, notifications and housekeeping
16	Changes to Sage 200 screens
17	Recommended practice
18	Troubleshooting

1. What Channels does

Channels connects Sage 200 to the places your orders come from and your stock goes to – marketplaces such as Amazon, eBay and Etsy, web stores such as Shopify, WooCommerce and Magento, retailers' drop-ship systems, EDI trading partners, text and Excel files, and outsourced warehouses (third party logistics). Each connection is a **channel**. Whatever the channel, the work follows the same pattern:

Step	What happens
1. Download	Orders are fetched from the channel (or received from it) and stored in Channels, where they can be checked before Sage sees them.
2. Convert	Each stored order is converted into a Sage 200 sales order: customer, items, prices, VAT, carriage, warehouse, payment and notes are worked out from the channel's settings and mappings.
3. Acknowledge	Where the channel expects it, Channels tells the channel the order has been accepted (or rejected).
4. Despatch and ship	When the order is despatched in Sage, Channels sends the channel the shipment – carrier, tracking number and the lines shipped – and, for some channels, the invoice.
5. Stock and products	Channels keeps the channel's stock levels (and, for some channels, prices and product data) in step with Sage.

Most of this runs unattended from **job bags** – lists of jobs that Channels runs on a schedule (section 15) – while the screens let you see what has happened, step in when something needs attention and set everything up.

This guide describes the parts every channel shares. The companion **Channels – Channel Reference** has a chapter for each channel: how to connect it, its own screens and options, and what it can do.

Important: Many Channels buttons act on the live channel straight away – downloading orders, sending stock levels, confirming shipments, cancelling. Set up and test new channels on a test company and, where the channel offers one, a test or sandbox account, and take a database backup before the first live run.

2. Before you start

This chapter is for whoever installs and administers Channels – usually your Sage business partner together with your Sage 200 system administrator. It covers installation, the licence, where everything is on the menu, which role features to give to which users, and the order in which to set things up.

2.1 Installation

Channels is a Sage 200 add-on. It is installed through Sage 200 System Administration in the same way as any other add-on, using the **Channels** add-on package (this guide describes version 25.1.26.608). Installing or upgrading the add-on:

- adds the Channels tables to each company database the add-on is enabled for, and updates them on every upgrade;
- adds the **Channels** folder to the Sage 200 menu under **Accounting System**, and a **Channels** entry under **Accounting System Manager** ► **Settings** ► **Tilted Settings**;
- installs the program files every Sage 200 workstation needs, including the components used by scheduled automation (section 15) and by the Channels web API (section 8);
- adds Channels panels, fields and buttons to a number of standard Sage 200 screens – sales orders and returns, purchase orders and returns, customer accounts, delivery addresses and stock items (section 16).

Important: Channels needs the **Tilted base add-on** (Tilted Sage 200) to be installed first. The base add-on provides the Tilted licence, the **Tilted Settings** menu and components every Tilted add-on shares. When you upgrade Channels, upgrade the base add-on to the matching release at the same time.

Close and reopen Sage 200 on each workstation after installing or upgrading so the new menu items and screens are picked up. The first time anyone opens **Channels** ► **Settings** in a company, Channels creates that company's settings with sensible defaults: a **Channels** folder under the Sage 200 shared folder as the root folder and the first warehouse as the default warehouse.

2.2 Licence

Channels is covered by your Tilted licence – the same licence that covers any other Tilted add-ons you use. Sage 200 refreshes it automatically from the Tilted licence service when it starts. The licence records which add-ons you may use, when it expires and, for Channels, how many channels you may have switched on at the same time.

Licence element	What it controls
Channels	Required to open any Channels screen. Without it a screen shows a licensing message and closes.
Third Party Logistics	Required, in addition, to set up a Third Party Logistics channel (an outsourced warehouse) and for the Third Party Logistics additions to the Sage 200 despatch and order line screens.
Maximum channels	How many channels may be enabled at once. Unlimited unless your licence says otherwise. Third Party Logistics channels and channels that are not enabled do not count. Settings ► General shows the figure as Unlimited number of channels or Licensed for a maximum of 5 channels .

When the maximum is reached, ticking **Enabled** on another channel in the connection wizard is refused with “You cannot enable this channel as you've already enabled 5 of 5 licensed”. Switch another channel off, or ask your Sage business partner about a larger licence.

If the licence is missing, invalid or expired, any Channels screen you open shows one of these messages (title **Tilted Sage 200 Licensing**) and closes: “Feature 'Channels' is not licensed”, “Invalid Tilted Sage 200 Customisations License”, “Tilted Sage 200 Customisations License Expired”. In the 30 days before the licence expires Sage 200 reminds you with “Tilted Sage 200 customisations license expires in 14 days” and “Please contact your Sage Business Partner”.

2.3 Where things are

Everything is under **Accounting System ► Channels** – in this guide the menu is written **Channels ►** Each channel type has its own folder holding that channel's lists (orders, converted orders, shipments, inventory and so on); the lists that every channel shares are described in sections 6, 11 and 13, and each channel's own lists in its chapter of the **Channels – Channel Reference**. The folders are on every menu whether or not you use the channel – use role features (section 2.4) to hide the ones you do not need.

Menu path (Channels ► ...)	What it holds	Described in
Amazon Direct Fulfillment	Order, converted order, shipment, invoice and inventory lists	Channel Reference, chapter 3
Amazon Seller	Order, shipment, inventory and feed response lists	Channel Reference, chapter 2
API ► Order List	Orders posted to Sage through the Channels API	Section 8.7
Channel Advisor	Order, converted order, adjustment, shipment and inventory lists	Channel Reference, chapter 20
ChannelEngine	Order, converted order, shipment and inventory lists	Channel Reference, chapter 21
ConnectWise	Order list	Channel Reference, chapter 19
CS-Cart	Order, shipment and inventory lists	Channel Reference, chapter 8
Dunelm	Order, converted order, shipment and delivery lists	Channel Reference, chapter 26
Ebay	Order, shipment and inventory lists	Channel Reference, chapter 9
EDI	Order, converted order, shipment, invoice, credit note and inventory lists	Channel Reference, chapter 28
Etsy	Order, shipment and inventory lists	Channel Reference, chapter 10
Groupon	Order, converted order, shipment and ready-to-invoice lists	Channel Reference, chapter 16
Kornit	Order, converted order, shipment and inventory lists	Channel Reference, chapter 17
Magento	Order, shipment and inventory lists	Channel Reference, chapter 6
ManoMano	Order, converted order and shipment lists	Channel Reference, chapter 14
Marketplacer	Order, shipment and inventory lists	Channel Reference, chapter 13
Mirakl	Order, shipment and inventory lists	Channel Reference, chapter 12
Not on the High Street	Pricing, order and shipment lists	Channel Reference, chapter 18

Menu path (Channels ► ...)	What it holds	Described in
Shopify (with SparkLayer sub-folder)	Order, shipment and inventory lists; the five SparkLayer feed lists	Channel Reference, chapter 4
SquareSpace	Order, shipment and inventory lists	Channel Reference, chapter 7
StoreFeeder	Order, raise purchase orders, converted order, shipment and inventory lists	Channel Reference, chapter 22
Temu	Order, shipment and inventory lists	Channel Reference, chapter 11
Text & Excel Files	Order, converted order, shipment, delivery, credit note and invoice lists for Text File channels	Channel Reference, chapter 29
Text & Excel Files ► Inventory List	Stock files for Inventory channels	Section 11.5
Text & Excel Files ► Customer List	Customer data feeds	Section 7.2
Text & Excel Files ► Products ► Product List / Import / Export Product Data	Product data feeds and product data import/export	Section 12
The Range	Order, converted order, shipment and inventory lists	Channel Reference, chapter 27
Third Party Logistics	Manual release screens and the outbound and inbound 3PL lists	Channel Reference, chapter 30
Very	Order, converted order, shipment and inventory lists	Channel Reference, chapter 24
Virtual Stock	Order, converted order, delivery booked, shipment, delivered order, invoice and inventory lists	Channel Reference, chapter 23
Wayfair	Order, converted order, shipment, Castlegate shipment and inventory lists	Channel Reference, chapter 25
WooCommerce	Order, converted order, shipment and inventory lists	Channel Reference, chapter 5
Wowcher	Order, converted order and shipment lists	Channel Reference, chapter 15
Notification List	Customer notifications (email and SMS) waiting to be built into feeds	Section 15.10
Export Feeds	Every file or message Channels has created to send to a channel	Section 14
Channel List	Add, change and delete channels	Section 4
Settings	Company-wide Channels settings	Section 3
Accounting System Manager ► Settings ► Tilted Settings ► Channels	The same Settings screen	Section 3

2.4 Permissions (role features)

Every Channels screen is a separate feature in Sage 200 System Administration, so you can give each role exactly the screens it needs. Open the role, go to its features and tick the ones you want under **Channels**. A menu item is only shown to users whose role has its feature.

Feature group	Features (screens)
Channels ► Administration	Channels (the Channel List) and Settings
Channels ► Common	Notifications (Notification List) and Export Feeds
Channels ► (channel name) – one group per channel, for example Channels ► Shopify	One feature per item in that channel's menu folder – typically Orders , Converted Orders , Shipments , Inventory and Invoices
Channels ► Shopify ► SparkLayer	The five SparkLayer feed lists
Channels ► API ► Orders	Order List
Channels ► Text Files	The Text & Excel Files lists: Orders , Acknowledgements (Converted Order List), Shipments , Deliveries , Credit Notes , Invoices
Channels ► Inventory , ► Customers , ► Products	Text & Excel Files ► Inventory List, Customer List, and both Products screens

Feature group	Features (screens)
Channels ► Third Party Logistics (and ► Manual Release)	One feature per Third Party Logistics list and release screen

A few feature groups are named differently from their menu folder: **Magento2** (menu **Magento**), **Mano Mano** (menu **ManoMano**), **The Range ► DHD** (menu **The Range**) and **Text Files** (menu **Text & Excel Files**).

Important: Give **Settings** and **Channels** (the Channel List) only to the people who administer Channels. They change how every channel's orders are turned into Sage documents.

2.5 Recommended set-up order

1. Install (or upgrade) the Tilted base add-on, then the **Channels** add-on, and confirm the licence: open **Channels ► Settings** – the **General** tab shows how many channels you are licensed for.
2. Give roles the Channels features they need (section 2.4).
3. In Sage 200 sales order settings, create the order analysis codes Channels will use for the courier, the tracking number, the tracking link and the carrier service, if you do not have them already.
4. On **Settings ► General** choose the root folder, the default warehouse and those four analysis codes (section 3.1).
5. Work through the other Settings tabs: the warehouses Channels uses (**Inventory**, section 11.4), how stock codes are matched and how bills of materials are handled (**Stock**, section 3.3), the automatic shipping line (**Shipping**, section 3.7), automatic customer matching and creation (**Customers**, section 3.8) and retail tax (**International**, section 3.9).
6. On the **Mapping** tab click **Create Default** and **Refresh Analysis Codes** (section 3.14), then set up **Couriers Tracking URLs** (section 5.7) and, if you sell to other countries under retail tax rules, **Tax / Registration Codes** (section 5.8).
7. Add your FTP sites on the **FTP Sites** tab if any channel exchanges files by FTP (section 3.2), and any stock aliases or bundles (section 9).
8. Add each channel from **Channels ► Channel List** with **Enabled** clear (section 4), and set its options and mappings (section 5).
9. Tick **Enabled** on the channel, download a few orders by hand from its order list and convert them, then check the Sage sales orders that were created (section 6). For channels you send stock to, create an inventory snapshot and check the figures on the channel's **Inventory List** before the first stock feed (section 11).
10. Add any actions (section 10), then the notification sets and the job bags that run the channel on a schedule (section 15).
11. Schedule the job bags (section 15.7) and read the log files after the first runs.

3. The Settings screen

Channels ► Settings (also **Accounting System Manager ► Settings ► Tilted Settings ► Channels**) holds the settings that apply to every channel in the company. This chapter goes through it tab by tab. The **Inventory**, **Stock Aliasing**, **Bundles**, **Actions**, **Web Hooks**, **Automation** and **Notifications** tabs belong to subjects that have their own chapters; for those tabs this chapter gives a short summary and a pointer. Settings that belong to one channel are in that channel's connection wizard and **Channel Options** (sections 4 and 5).

The screen has fourteen tabs: **General**, **FTP Sites**, **Stock**, **Inventory**, **Stock Aliasing**, **Bundles**, **Shipping**, **Customers**, **International**, **Actions**, **Web Hooks**, **Automation**, **Notifications** and **Mapping**. The buttons along the bottom apply to the whole screen:

Button	What it does
Save	Saves every field on every tab and closes the screen. If something is missing (for example a duties nominal code) a message explains what to fix and the screen stays open.
Purge data	Opens Purge Data to remove old Channels records (section 15.11).
Validate Channels	Loads every channel's settings and mappings and tells you about any channel that cannot be loaded, then shows "Validation complete." (section 3.15).
Close	Closes the screen. Changes to fields that you have not saved are discarded without a warning.

The lists on the tabs (FTP sites, stock alias groups, bundles, actions, web hooks, job bags and notification templates) are saved by their own windows as soon as you click **Save** there – they do not wait for the Settings **Save**. **Pause Feeds** and the action **Move Up / Move Down** buttons also take effect straight away. Buttons that need the current settings (**Couriers Tracking URLs**, **Refresh Analysis Codes**, **Create Default**, **Create Snap Shot** and **Delta Snap Shot Update**) save the settings first.

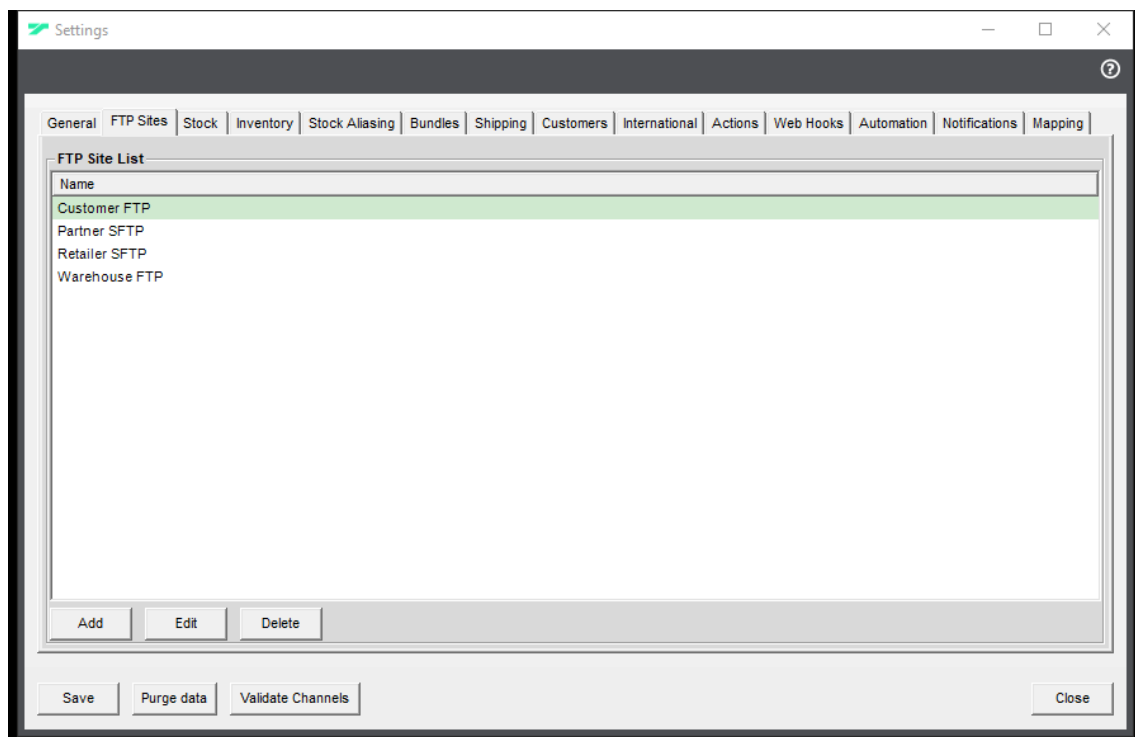
3.1 General

Settings – General tab

Field	What it does
Root folder:	The folder under which Channels keeps its working files – downloaded files, archives and the export feeds it creates (one sub-folder per channel, named after the channel). Use a shared network folder that every workstation and the automation server can reach, for example \\SERVER\Sage\Channels . If the path does not end in Channels , a Channels folder is added to it, and the folder is created when you save. Click ... to browse.

Field	What it does
Custom assembly:	Only used when Tilted has written a bespoke extension for you: the extension file whose classes replace standard Channels behaviour (chosen per channel on the wizard's Customisation page). Click ... to browse. Keep the file on a network share – if you choose a local path you are reminded “Note : Custom assemblies should be on a network share”.
Default warehouse:	The warehouse Channels uses when an order line does not say which warehouse to use, and the starting point for the warehouse list on the Inventory tab.
Ship service analysis code:	The sales order analysis code that holds the carrier service (for example Next Day). Channels sends it to the channel with the shipment, translated through the channel's Services mapping (section 5.6).
Tracking analysis code:	The sales order analysis code that holds the tracking number of a despatch.
Tracking URL analysis code:	The sales order analysis code that holds a tracking link, for channels that take one. When it is chosen, Channels shortens each tracking link with Bit.ly and writes it into this analysis code (section 13.4).
Courier analysis code:	The sales order analysis code that holds the courier. Its values are the rows of Couriers Tracking URLs (section 5.7) and of each channel's Couriers mapping (section 5.5).
Auto allocate receipts to posted invoices	When an invoice for a channel order is posted, allocate the receipt Channels created for that order's payment against it, so the customer account is left clear.
Unlimited number of channels / Licensed for a maximum of ... channels	Information only: what your licence allows (section 2.2).
Enable debug mode	Writes extra detail to the Channels log files. Switch it on only while Tilted support is investigating something.
Use responsive operations	Long operations on the Channels lists (downloading, processing, creating feeds) run with a progress window and a Cancel button, and Sage 200 stays responsive while they run.

3.2 FTP Sites



Settings – FTP Sites tab

The **FTP Site List** holds every FTP or SFTP server that Channels exchanges files with. A channel that uses FTP picks one of these sites on its **FTP** wizard page (section 4.8), so a server shared by several channels is set up once. Use **Add** and **Edit** (or double-click) to open the **FTP Connection** window, and **Delete** to remove a site after confirming “Are you sure you want to delete the selected connection?”.

FTP Connection

FTP Connection

Field	What it does
Name:	The name you pick on a channel's FTP page.
URL:	The server name, for example sftp.example.com .
Username: / Password:	The login.
Different outgoing credentials	Tick when the server uses a different login for files you send; enter Out Username: and Out Password: .
Incoming Folder:	The folder on the server Channels downloads from. A channel's FTP page can add a sub-folder per document type.
Incoming Mask:	Only download files whose names match, for example *.csv .
Outgoing Folder:	The folder on the server Channels uploads to.
Port:	Usually 21 for standard FTP or 22 for secure (SFTP), as the hint says.
Passive	Use passive mode – needed behind most firewalls for standard FTP.
Secure (default SFTP)	Connect with SFTP.
FTPS	Connect with FTP over TLS (ticks Secure for you).
Ignore SSL Issues	Accept the server's certificate even if it cannot be verified. Use only on a server you trust.
Fluent / WinSCP	Use an alternative transfer engine. Leave both clear unless Tilted support advises otherwise for a particular server.
Uses Public / Private Key Pair	SFTP with key authentication (needs Secure). Enter the Private Key File: (or click ...) and its Passphrase: .
Host Key:	The server's host key fingerprint, for SFTP servers that require it.

Button	What it does
Save	Saves the connection.
Test Listing	Connects to the server and lists the incoming folder: "Connection test was successful, 3 files." followed by the first file names. If it fails you see the reason and can save it to a file for your IT team.
Test Upload	Asks you for a file and uploads it to the outgoing folder ("Upload test was successful").
Cancel	Closes the window.

Important: **Test Listing** and **Test Upload** really connect to the server, and **Test Upload** really places the file you choose in the partner's outgoing folder, where they may pick it up. Upload only a harmless file agreed with the partner.

3.3 Stock

Settings – Stock tab

The **Stock** tab decides how an order line's SKU is matched to a Sage stock item and how Channels finds stock for the line when it creates the sales order.

Field	What it does
Aliasing: Use Channels / Use Tilted Customer Stock Items / Use Eureka Customer Stock Items	Where Channels looks for a SKU that is not a Sage stock code or barcode: the Channels stock alias groups, or the customer stock codes held by the Tilted Sage 200 add-on or by Eureka. Section 9.1 explains the choice and how a SKU is matched.
Bills of Materials: Build and allocate out of stock BoM items	When an order line is a bill of materials without enough stock, build the shortfall and allocate it. A channel can opt out with Disable BoM Build & Allocate in its options.
Build using Channels internal issues and allocations	Build the bill of materials with Channels' own component issue and receipt rather than a Sage BoM build.
Generate Sicon Kit lines as required	For Sicon kits that are out of stock, ask Sicon to generate the kit lines.
Allocate free stock to Customer when BoM shortage is found	When a component is short, allocate the free stock of the other components to the customer so they are held for the order.

Field	What it does
Customer Allocations: Allocate from stock allocated to the customer	Use stock already allocated to the customer (Sage customer allocations) when allocating order lines – Always , or Only when out of stock in free stock. A note reminds you that built or bought-and-built items need building before they can be allocated to the customer.
Use Sicon stock reservations where available	Treat Sicon stock reservations as customer allocations.

3.4 Inventory

The **Inventory** tab controls the inventory snapshot – the stock picture from which every channel's stock feed is built: the warehouses whose stock counts, what is added to and taken off free stock, next available dates and the system-wide buffer, with the **Pause Feeds**, **Create Snap Shot**, **Delta Snap Shot Update**, **View Snap Shot** and **Virtual Warehouses** buttons. The ticked warehouses are also the warehouses Channels searches when it matches an order's SKU to a stock item. The tab is described field by field in section 11.4.

3.5 Stock Aliasing

The **Stock Alias List** holds groups of alternative codes that channels use for your stock items. **Add**, **Edit** (or double-click) and **Delete** maintain the groups. Aliases are used when **Use Channels** is chosen on the **Stock** tab. The window is shown in section 9.1.

3.6 Bundles

The **Bundle List** holds bundle groups – a bundle is a channel SKU that is supplied as several Sage stock items. **Add**, **Edit** and **Delete** maintain the groups. Tick **Enable SOP Customisation** to add an **Add bundle** button to the Sage 200 sales order screens (section 9.3). The window is shown in section 9.2.

3.7 Shipping

Settings – Shipping tab

When Channels creates a sales order it can add a line for the carriage the customer paid (section 6.6, Carriage). The **Options** group says where the shipping details come from in the channel's order; the **Line** group says what kind of line to add.

Field	What it does
Shipping value field:	The order field that holds the carriage charged (normally Shipping Value).
Shipping discount field:	The order field that holds any carriage discount, deducted from the value (normally Shipping Discount Value).
Shipping method field:	The order field that holds the shipping method (normally Shipping Method).
Shipping tax code field:	The order field that holds the tax code for the shipping line (normally Shipping Tax Code). If the order has none, the tax code of the order's first line is used.
Missing Email Address: / Missing Phone Number:	Put on the sales order's delivery address when the channel order has no email address or phone number, for carriers that insist on one. A channel can switch this off in its options.
eDesk Bearer Token: / Retry Hours:	Your eDesk connection, for channels that send despatch details to eDesk (Enable eDesk Integration in Channel Options, section 5.1), and how many hours Channels keeps retrying a failed upload.
Use Sicon courier tracking data	When a despatch has no tracking number, use the one recorded by Sicon courier integration.
Automatically create shipment lines	Add a carriage line to each new sales order. The options below are only available when this is ticked. A channel can opt out in its options.
Free text with Description: and Free text confirmation intent:	Add a free text line with this description (default "Shipping") and confirmation intent.
Additional charge and charge code	Add an additional charge line using this SOP charge code.
Stock item and stock item	Add a line for this (service) stock item.
Use shipping method field as line description	Use the order's shipping method as the free text description.
Use shipping method field where populated for custom additional charge or stock item shipment lines	When the order's shipping method is the code of an SOP additional charge or a stock item, use that charge or item for the carriage line. The shipping method must then always be a valid code; if it is not, the order stops with "Failed to locate shipping additional charge or stock item using code ...".

A carriage line is only added when its value is more than zero, so orders with free shipping get none. When the channel leaves the carriage value empty, an additional charge line takes the charge's price from Sage.

3.8 Customers

Settings

General FTP Sites Stock Inventory Stock Aliasing Bundles Shipping Customers International Actions Web Hooks Automation Notifications Mapping

Options

☒ Find customer using email address when customer mapping left empty

☒ Automatically generate customer reference when no match

Prefix: WEB Next Number: 1001 [Options](#)

☐ Use existing account when no match

Account:

☐ Create Sicon CRM End User Record [Sicon CRM End User Options](#)

☐ Create new Sales Ledger account based on number of Sicon End Users

Max End User accounts per Customer: 0

Save Purge data Validate Channels Close

Settings – Customers tab

Most channels post all their orders to one Sage customer account set in the channel's field mapping. Where a channel's orders carry the end customer instead, these options let Channels find or create the right account. They apply to every channel unless a channel overrides them on the **Customers** tab of its Channel Options (section 5.1). Section 6.6 (Customers) explains how an order's customer is found or created when the order is converted.

Field	What it does
Find customer using email address when customer mapping left empty	When an order arrives with no customer account, look for a customer contact with the order's billing email address (or, if it has none, its email address) in the order's currency. Without this, such an order stops with "Customer account number is empty".
Automatically generate customer reference when no match	If no account matches, create one from the order's billing (or delivery) name and address. The new reference is the Prefix: followed by the Next Number: , padded with zeros to eight characters (prefix WEB , next number 1001 gives WEB01001); the number goes up by one each time. If Sage 200 is set to generate customer references itself you can leave the prefix and number blank. Options sets the tax code and price band for new accounts in each currency (section 5.2).
Use existing account when no match with Account:	If no account matches, use this account instead (for example a single "web sales" account). Choose this or the previous option, not both.
Create Sicon CRM End User Record	Also record the order's customer as an end user in Sicon CRM. Sicon CRM End User Options sets how the record is made (section 5.11).
Create new Sales Ledger account based on number of Sicon End Users and Max End User accounts per Customer:	With Sicon end users and automatic references, keep adding end users to the current account until it has this many, then create a new account.

When you save, Channels checks the choices make sense: "You need to choose a customer account if you're going to use a default", "You need to setup the prefix/next number when choosing to automatically

create a customer account”, and – if **Find customer using email address...** is ticked without either option below it – “You need to choose an option for the scenario where there's no email match”.

3.9 International

Settings – International tab

These settings are used by channels that have **Use retail tax mappings** ticked in their Channel Options (section 5.1) – typically consumer web stores that sell abroad.

Field	What it does
EU retail tax code:	The tax code for an order delivered to an EU country.
Non EU retail tax code:	The tax code for an order delivered outside the EU (other than the UK).
Use EU retail tax mappings (only when registered for VAT in other EU countries)	Instead of the two codes above, take the tax code from Tax / Registration Codes (section 5.8) for the customer's country – one code for deliveries into the EU and one for deliveries outside it.
Based on shipping country code rather than billing country code	Use the delivery country rather than the billing country to find the row in Tax / Registration Codes .
Order duties enabled, Order duties nom acc. :, Order duties tax code:	When a channel passes import duties on an order, add them to the sales order as a free text line called “Duties” posted to this nominal account with this tax code. Both are required when the box is ticked.

Orders for UK delivery keep the customer's own tax code.

3.10 Actions

The **Action List** holds rules that change orders automatically before or after they are processed – for example putting high-value orders on hold. The list shows each action's **Name**, **Execution** point and whether it is **Enabled**, in the order the actions run. **Add**, **Edit** and **Delete** maintain them, **Move Up** and **Move Down** change the order immediately, and **Customer Group Setup** maintains the customer groups actions can be limited to. See section 10. The window is shown in section 10.2.

3.11 Web Hooks

The **Incoming Web Hook List** and **Outgoing Web Hook List** hold the web hooks Channels receives and sends, each maintained with **Add**, **Edit** and **Delete**; **Create Batch** opens **Outgoing Batch** for the selected outgoing web hook. See section 8. The window is shown in section 8.1.

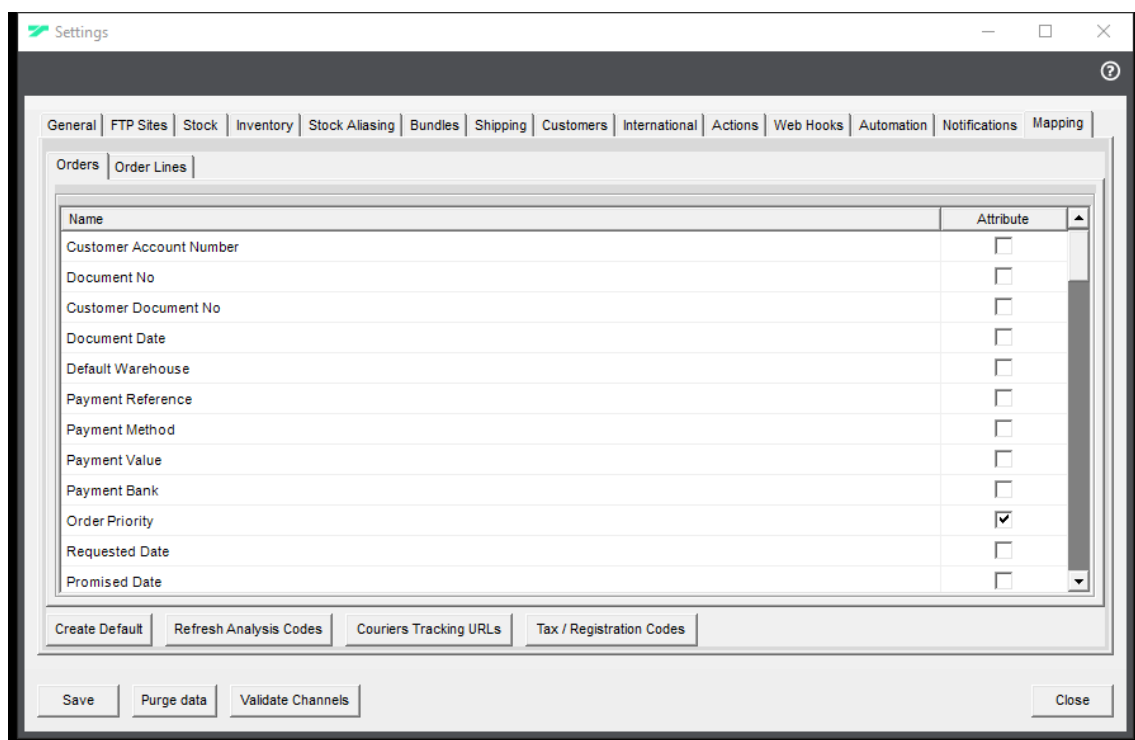
3.12 Automation

Default error emails: and **Default warning emails:** are the addresses that receive the error and warning emails of scheduled job bags (separate several addresses with commas or semicolons). The **Jobs** list holds the job bags – the lists of jobs Channels runs on a schedule – maintained with **Add**, **Edit** and **Delete** (section 15.3). The window is shown in section 15.2.

3.13 Notifications

The **Options** group holds the accounts Channels uses for customer notifications: **SMS Originator:** and **SMS Access Key:** for text messages, and **Bit.ly URL:** and **Bit.ly Token:** for shortening tracking links. The **Templates** list holds the notification sets (**Add**, **Edit**, **Delete**). The **Test** button next to the SMS settings opens **Test MessageBird**, and the one next to the Bit.ly settings shortens an example link through Bit.ly. The window, and **Test MessageBird**, are shown in section 15.10.

3.14 Mapping



Settings – Mapping tab

The **Orders** and **Order Lines** tabs list the Sage-side fields that every channel's **Field Mapping** offers (section 5.3) – customer account, addresses, payment, shipping values and so on, plus one field for each sales order analysis code. **Name** is the field's name; tick **Attribute** to keep that field's value with the order as an attribute (for example to print it or use it in actions) rather than write it to a Sage field.

To add a field, type its name in a new row. To remove one, clear its name; if a channel maps it you are asked “At least one of the fields you're deleting is mapping in an existing module, are you sure you want to

delete these?”, and **Yes** removes those channels' mappings too. Changes are saved by **Save**. A new field appears in an existing channel's field mapping after you click **Refresh** there.

Button	What it does
Create Default	After “This will check for and recreate the default fields, do you want to continue?”, saves the settings and adds any standard field that is missing. Existing fields are left alone.
Refresh Analysis Codes	After a similar question, saves the settings and adds a field for each sales order analysis code that has none – run it after you add an analysis code in Sage.
Couriers Tracking URLs	Saves the settings and opens Courier Mapping (section 5.7). You need to choose the Courier analysis code : on the General tab first.
Tax / Registration Codes	Opens Country Tax Codes (section 5.8).

3.15 Validate Channels and Purge data

Validate Channels loads every channel in turn, exactly as Channels does before it processes orders, and shows “Seems to be a problem loading module 'Shopify UK', probably need to delete it and start again” for any channel whose settings cannot be read. Run it after an upgrade. It does not change anything.

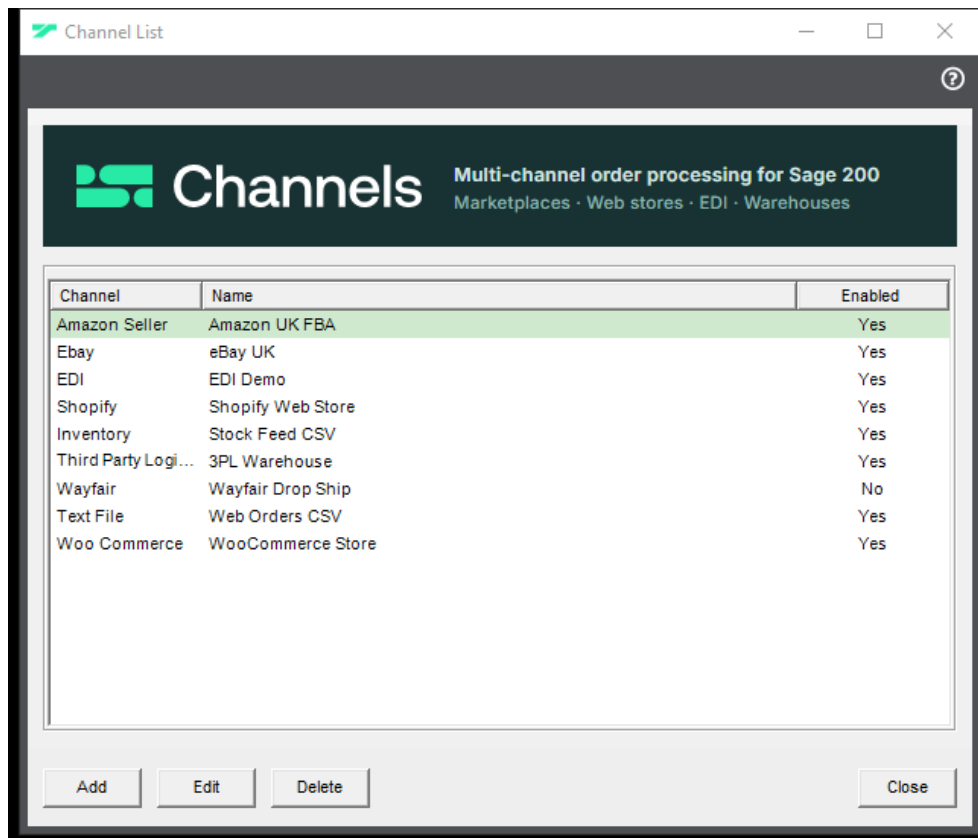
Purge data removes Channels records you no longer need, such as the records of completed orders and old export feeds. See section 15.11.

4. Channels – the Channel List and the connection wizard

A **channel** is one connection between Sage 200 and an outside party: a Shopify store, an Amazon Seller account, an EDI trading partner, a folder of order files, a third-party warehouse, a stock feed for a distribution list and so on. You can have several channels of the same type – for example **Amazon UK** and **Amazon DE**, or a separate text-file channel for each retailer that sends you spreadsheets. Each channel has its own name, connection details, options and mappings, and can be switched on and off on its own.

4.1 The Channel List

Open **Channels** ► **Channel List**.



Channel List

The list shows every channel with its type (**Channel**), its **Name** and whether it is **Enabled**. Only enabled channels download orders, send shipments and stock, and run in job bags.

Button	What it does
Add	Starts the connection wizard for a new channel (section 4.2).
Edit	Opens the selected channel in the connection wizard (double-clicking does the same).
Delete	Deletes the selected channel after “Are you sure you want to delete the selected channel?” (section 4.4).
Close	Closes the list.

4.2 Adding a channel

1. On the Channel List click **Add**. The **Connection Wizard** opens on the **Choose Channel** page.
2. Select the channel type and click **Next**.
3. Complete the channel's own pages – usually a connection page (name, **Enabled**, account details) followed by option pages. They are described in the channel's chapter of the **Channels – Channel Reference**.
4. On the last page, **Customisation**, set the channel's **Options** and mappings (section 5).
5. Click **Save**. The channel appears in the Channel List.

Leave **Enabled** clear on the connection page while you set the channel up. A channel that is not enabled is not offered on the Channels lists, does nothing in job bags and does not count towards your licence. Tick it when you are ready to try the channel by hand, and add it to a scheduled job bag only once it works.

4.3 Changing a channel

Select the channel and click **Edit**. The wizard opens on the channel's first page with its current settings. Move through the pages with **Next** and **Back**, or click **Skip** to go straight to the last page, and click **Save** there. The channel type cannot be changed – to move to a different type, add a new channel.

4.4 Deleting a channel

Select the channel, click **Delete** and confirm. Channels removes the channel, its settings and field mappings, and takes it out of any job bags. Sales orders, despatches and invoices already created in Sage are not changed.

Important: Deleting a channel cannot be undone. If you might need it again, edit it and clear **Enabled** instead.

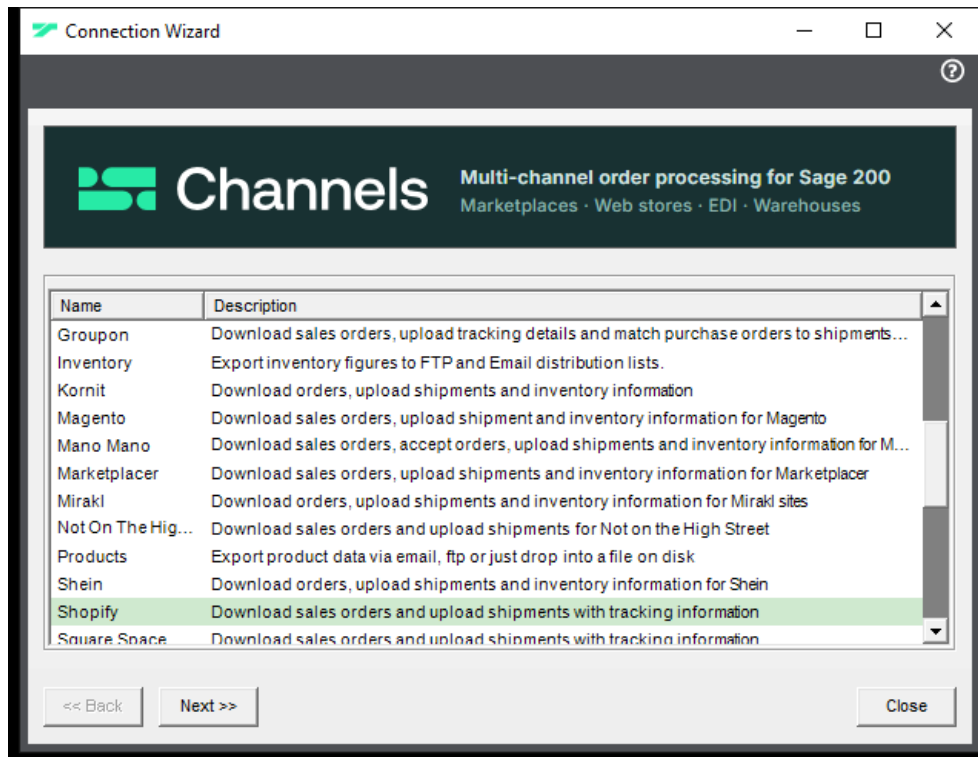
4.5 The connection wizard

Every channel is set up and changed in the **Connection Wizard**. The banner at the top shows the channel's logo, the pages in the middle change as you move through, and the buttons along the bottom are:

Button	What it does
<< Back	Returns to the previous page. Going back to Choose Channel on a new channel starts the channel again.
Next >>	Checks the current page and moves to the next one. Pages that do not apply to the channel as you have set it up are skipped (for example the file pages of a third-party warehouse that is connected by API).
Skip >>>	Checks the current page and jumps to the last page.
Save	Shown in place of Skip on the last page: saves the channel and closes the wizard.
Close	Closes the wizard.

The pages each channel type shows are described in the **Channels – Channel Reference**. The pages that several channel types share are described below.

4.6 Choose Channel



Connection Wizard – Choose Channel

The list shows each channel type with a short **Description** of what it does. Select one and click **Next** (if nothing is selected you see “You need to select a channel to continue”). Most names match the Channels menu; the ones that do not are:

Choose	To set up
Text File	A file-based channel – orders in and acknowledgements, shipments, deliveries, invoices and credit notes out, as CSV, Excel, JSON or XML (Text & Excel Files menu).
Inventory	A stock file sent to your customers by email, FTP or an end point (section 11.5).
Products / Customers	A product or customer data feed (sections 12 and 7).
API	Orders posted to Sage through the Channels API (section 8.7).
The Range DHD	The Range direct home delivery orders (The Range menu).
Third Party Logistics	An outsourced warehouse or drop-ship supplier. Needs the Third Party Logistics licence (section 2.2).

4.7 Connection page and Enabled

Every channel's first page asks for the channel's **Name** – shown in the Channel List, on every Channels list and used for the channel's folder under the root folder – and has an **Enabled** box. Choose a short, plain name such as **Shopify UK**. The rest of the page holds the channel's account details and is described in the Channel Reference.

4.8 FTP page

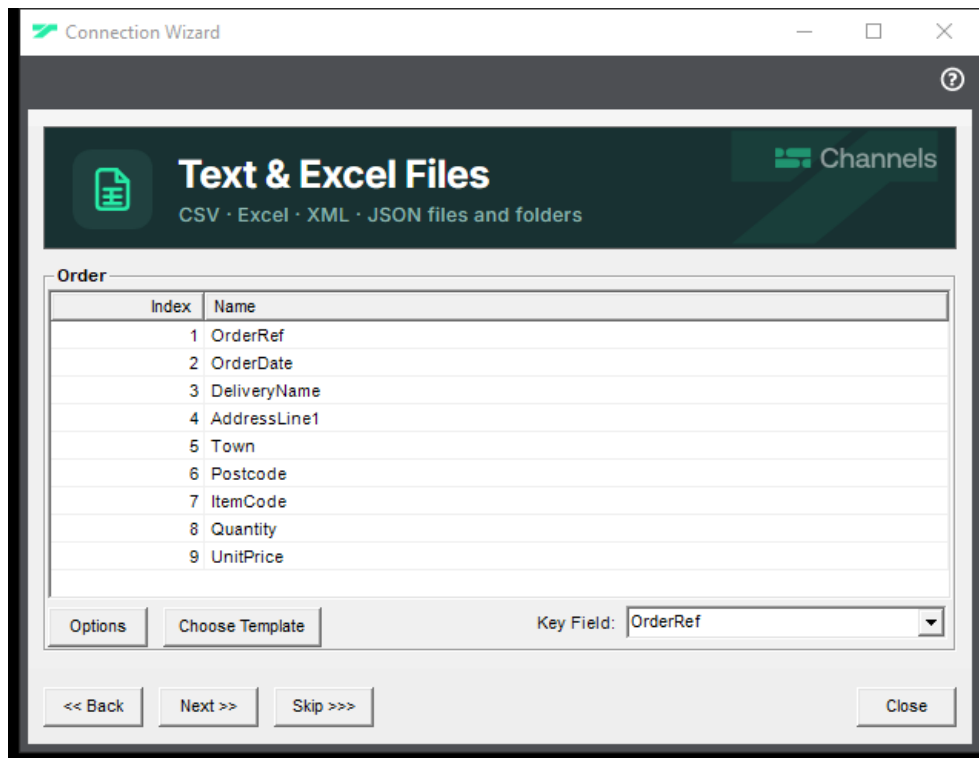
Channels that exchange files (EDI, Text File, Third Party Logistics, Very, Virtual Stock and The Range) have an **FTP** page.

Connection Wizard – FTP page

Field	What it does
FTP Enabled	Exchange this channel's files by FTP. Unavailable until at least one site exists on Settings ► FTP Sites (section 3.2). When clear, files are only read from and written to the channel's folders.
Connection:	The FTP site to use. Required when FTP Enabled is ticked ("You need to select an ftp connection").
Subfolders – Order:, Acknowledgement:, Shipment:, Invoice:, Credit note:, Delivered:, Inventory listing:, Inventory adjustment:, Sales return:, Sales return receipt:, Purchase order:, Purchase order rcpt:, Purchase return:, Purchase return ship:, Packing slip:	Optional sub-folder of the site's incoming or outgoing folder for each kind of document. Leave a box empty to use the site's folder itself. Only the document types the channel uses matter.
Upload PDF	Third Party Logistics only: also upload a PDF of each order.

4.9 File template pages

File-based channels (Text File, Inventory and Third Party Logistics) have one page per kind of file they read or write – for example **Order**, **Shipment** and **Invoice** – headed with that document's name. A page is unavailable when that kind of file is switched off on the channel's connection page.



Connection Wizard – file template page

Field or button	What it does
Column list (Index, Name)	The columns (or XML/JSON nodes) of the file, in order.
Choose Template	Loads the columns from a sample file the partner has given you. If columns are already set up you are asked “Are you sure you want to load a new template file? Existing mappings are kept for the columns that survive; new columns appear unmapped.” For XML and JSON choose a sample that contains every possible node.
Key Field:	For files Channels reads, the column that identifies one document (for example the order number) – rows with the same value belong to the same document. Required once columns exist (“You need to select a key field”). If a new template no longer has the key column you are told to choose another.
Options	The file format (below).

Map the columns to Sage fields with **Value Mapping ► Fields** on the **Customisation** page (section 5.3).

File format options

The 'Options' dialog box is shown with the following settings:

- General:**
 - ☐ Compressed
 - ☐ Password: [text box]
 - ☒ Default extension
 - ☐ Fixed filename: [text box]
- Options:**
 - ☒ CSV
 - ☒ Contains Headers
 - Field Delimiter: [text box]
 - ☐ Excel
 - ☐ Contains Headers
 - Header Row: [text box] 1 Fixed header fields
 - Password: [text box]
 - Skip Empty Cols: [text box]
 - ☐ JSON
 - Orders Node: [text box] ☐ JSON array
 - Items Node: [text box] ☐ JSON array
 - Encoding: [dropdown menu] UTF-8
 - ☐ Include declaration
 - ☐ File starts with an array

Buttons: Save, Cancel

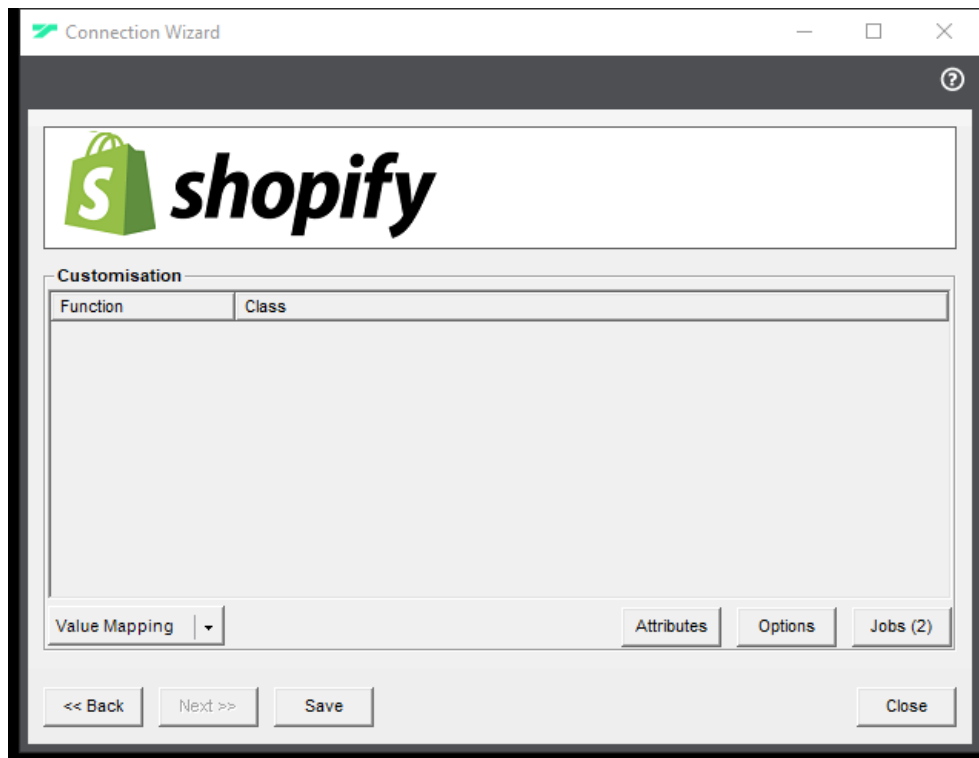
File template – Options

Field	What it does
Default extension / Fixed filename	For files Channels writes: name each file with the standard extension, or always use this file name.
Compressed and Password:	Zip the file, optionally with a password.
CSV with Field Delimiter: and Contains Headers	A delimited text file and whether its first row holds column names.
XML with Encoding: and Include declaration	An XML file (UTF-8 or UTF-16), optionally with the XML declaration line.
JSON with Encoding: and File starts with an array	A JSON file; tick the box when the whole file is an array.
Node names (for example Orders Node and Items Node) with JSON array	For XML and JSON: the node that holds each document and the node that holds each line; tick JSON array when the node is an array.
Excel with Contains Headers, Header Row:, Password:, Skip Empty Cols: and Fixed header fields	An Excel workbook: whether there is a header row and which row it is, the workbook password, columns that mark the end of the data when empty, and values that sit in fixed cells above the table.
End point – Post this file to its own end point, End point URL:, REST method:	Third Party Logistics files Channels sends only: post this file to its own web address instead of the channel's default end point.

Click **Save** to keep the options. You are told if something is missing: “You need to enter a delimiter”, “You need to select the encoding”, “You need to enter a password”, “You need to enter the end point URL”, “The end point URL needs to be a full http:// or https:// address” or “An Excel workbook cannot be posted to an end point - choose CSV, XML or JSON”.

4.10 Customisation page

Every channel's wizard ends with the **Customisation** page. Its buttons open the windows in section 5.



Connection Wizard – Customisation page

Field or button	What it does
Function / Class grid	Only used with a bespoke extension (Custom assembly : on Settings ► General): the extension class that replaces each standard function for this channel. Unavailable when no extension is set up.
Value Mapping ► Fields	Field mapping (section 5.3). For Products and Customers channels this opens the feed designer instead (sections 12 and 7).
Value Mapping ► Bank Accounts, Couriers, Services, Tax Codes, Units	Value mappings (sections 5.5 and 5.6).
Attributes	Extra fields this channel's orders carry that you want to be able to map (section 5.3).
Options	Channel Options (section 5.1).
Jobs (shows the number, for example Jobs (2))	The job bags that run this channel (section 15.8). Unavailable when the channel is in no job bag.

Inventory, Products, Customers and Third Party Logistics channels show only **Value Mapping** ► **Fields** and **Jobs**; a Third Party Logistics channel connected by API also shows **Couriers**.

5. Channel options and mappings

Each channel's options and mappings decide how its orders become Sage documents and how Sage values are translated for the channel. They are reached from the **Customisation** page at the end of the channel's connection wizard (section 4.10). This chapter describes the **Channel Options** window, field and value mapping, the courier, service and tax mappings, scripting for web hooks, the end point windows used wherever Channels posts to a web address, and two further windows opened from Channel Options.

5.1 Channel Options

Click **Options** on the **Customisation** page. The **Channel Options** window has four tabs – **Orders**, **Customers**, **Shipments** and **Inventory**. Click **Save** to keep your changes, or **Cancel** to close the window. What the options do when an order is converted is described in section 6.6.

Orders tab

Channel Options

Demo Data

Orders Customers Shipments Inventory

- ☒ Allow warehouse switching where item doesn't exist in default warehouse
- ☐ Allow warehouse switching where item exists in default warehouse but no free stock
- ☐ Suppress automatic creation of shipping line
- ☒ Complete sales order through to posting of invoice
- ☐ Suppress order raised message
- ☒ Create balancing invoice/credit where receipt value differs to SOP order total [options](#)
- ☒ Use retail tax mappings
- ☐ Raise warning on incorrect item line price
- ☐ Override incorrect item line prices with expected price
- ☐ Disable missing email address population
- ☐ Disable payment with order
- ☐ Post payment using sales order total value
- ☐ Order level discount creates negative free text line
- ☐ Nominal code:
- ☐ Await Carriers integration for automated shipments
- ☐ Add inventory if insufficient quantity free in warehouse
- ☐ Disable negative stock allocations
- ☐ Disable Customer discounts
- ☒ Mark converted sales orders as acknowledged
- ☐ Create Sicon Ready to Pick record ☐ Set Ready to Pick true
- ☐ Disable BoM Build & Allocate
- ☐ Default to not download orders
- ☒ Missing SKU creates free text line
- ☐ Disable missing phone number population
- ☒ Allow duplicate order numbers ☒ Only when date differs
- ☐ Allow orders for held customers ☐ Place order on hold
- ☐ Set as cash customer where billing details populated
- ☐ Sort lines by item code
- ☐ Use Retail best warehouse determination

Save Cancel

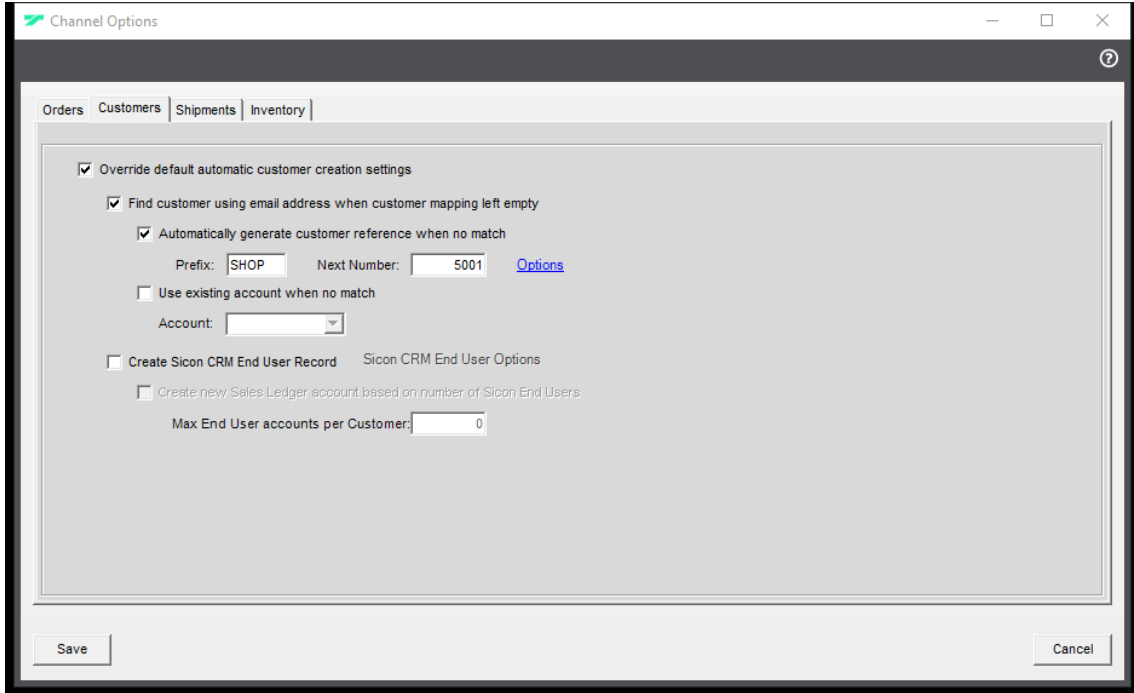
Channel Options – Orders tab

Field	What it does
Allow warehouse switching where item doesn't exist in default warehouse	If the order line's warehouse does not stock the item, move the line to the first warehouse ticked on Settings ► Inventory that does.
Allow warehouse switching where item exists in default warehouse but no free stock	Also move a line whose item is stocked in its warehouse but has no free stock there, to the first of those warehouses that has free stock.
Suppress automatic creation of shipping line	Do not add the automatic carriage line (Settings ► Shipping , section 3.7) to this channel's orders.
Complete sales order through to posting of invoice	After creating each sales order, allocate, despatch, invoice and post it in one go – for channels whose orders are already fulfilled (for example by the marketplace). An order that is on hold or not fully allocated is left for you to complete.
Suppress order raised message	Do not tell other Tilted add-ons that a channel order has been raised (for example to stop them adding their own lines).
Create balancing invoice/credit where receipt value differs to SOP order total	When the payment received differs from the Sage order total (rounding, gift cards and so on), post a small invoice or credit for the difference. The options link sets the limit and the nominal account (section 5.12).
Use retail tax mappings	Set the order's tax code from the delivery country using Settings ► International (section 3.9).
Raise warning on incorrect item line price	Compare each line's price with the Sage price book and send a warning when they differ.
Override incorrect item line prices with expected price	Replace a price that differs from the price book with the price book price.
Disable missing email address population	Do not fill in the Missing Email Address : from Settings ► Shipping .
Disable payment with order	Do not record the channel's payment as a payment with the order when there is no bank account mapping for its payment method.
Post payment using sales order total value	Record the payment as the Sage order's total rather than the amount the channel reported.
Order level discount creates negative free text line with Nominal code:	Show an order-level discount as a negative free text line posted to this nominal account, instead of as an order discount percentage.

Field	What it does
Await Carriers integration for automated shipments	Scheduled shipment jobs wait until the Tilted Carriers add-on has recorded the consignment (with its tracking) before building the shipment for the channel – for up to three days after the despatch (section 13.1).
Add inventory if insufficient quantity free in warehouse	When there is not enough free stock for a line, book the shortfall into stock so the line can be allocated.
Disable negative stock allocations	Do not allocate more than the free stock, even for items whose product group allows negative stock.
Disable Customer discounts	Remove the customer's discounts from the order – the channel's prices stand as sent.
Mark converted sales orders as acknowledged	Mark each new sales order as acknowledged in Sage.
Create Sicon Ready to Pick record and Set Ready to Pick true	Create the Sicon ready-to-pick record for each order and, optionally, set it to ready.
Disable BoM Build & Allocate	Do not build out-of-stock bills of materials for this channel's orders (Settings ► Stock , section 3.3).
Default to not download orders	No new orders are downloaded for this channel – neither by its download jobs nor by Find on its order list, where the channel is shown struck through. Everything else (converting, shipments, stock) still runs. Useful while a channel is being prepared.
Missing SKU creates free text line	When a SKU cannot be matched to a stock item, add the line as free text (code and description) instead of stopping the order.
Disable missing phone number population	Do not fill in the Missing Phone Number : from Settings ► Shipping .
Allow duplicate order numbers and Only when date differs	Allow an order whose customer order number already exists on another sales order for the customer – always, or only when the order dates differ.
Allow orders for held customers and Place order on hold	Create the order even though the customer account is on hold (the account is put back on hold afterwards), and optionally put the new order itself on hold.
Set as cash customer where billing details populated	Treat the order as a cash sale when the channel provides billing details.
Sort lines by item code	Once the sales order is created, renumber its lines so the stock lines run in item code order, followed by any free text, charge and comment lines in their original order. Ignored when the channel supplies its own line numbers (the Line Number order field, used by EDI), because those are the customer's line numbers.
Use Retail best warehouse determination	Shown only when the Tilted Retail add-on is installed: let Retail choose the best warehouse for each order.

Important: **Add inventory if insufficient quantity free in warehouse** books stock in to cover shortfalls, and **Complete sales order through to posting of invoice** posts invoices without anyone checking them. Switch them on only for channels where that is what you want.

Customers tab



The screenshot shows the 'Channel Options' window with the 'Customers' tab selected. The window has a title bar with a green icon and the text 'Channel Options'. Below the title bar is a tabbed interface with 'Orders', 'Customers', 'Shipments', and 'Inventory'. The 'Customers' tab is active. The main content area contains several settings:

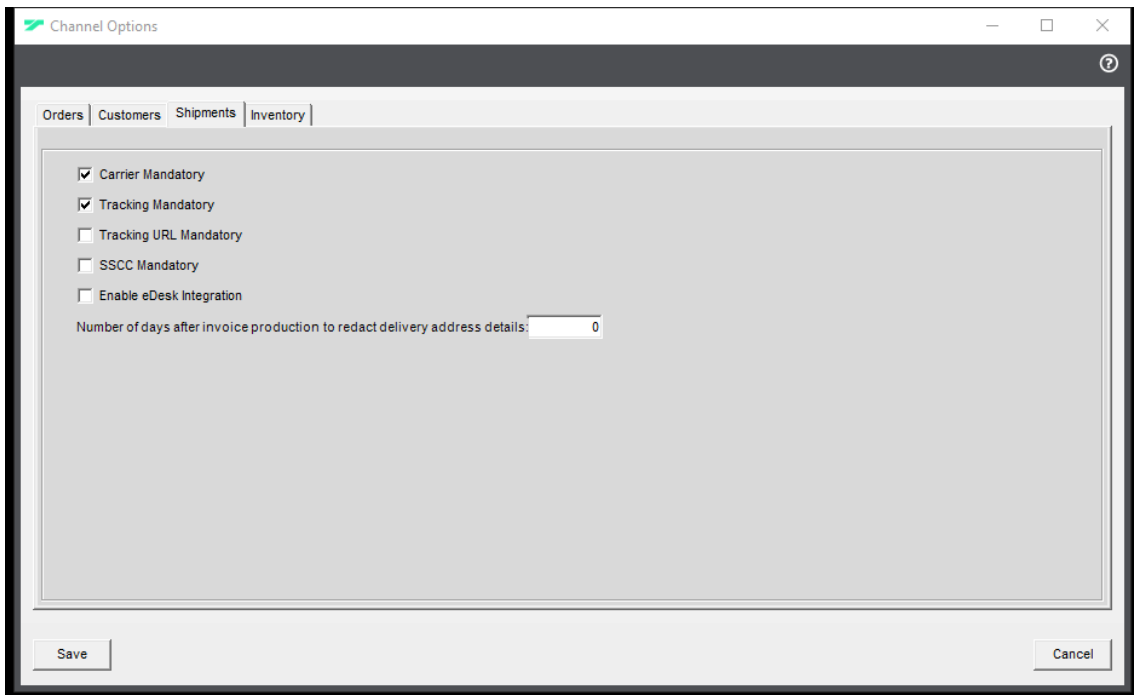
- ☒ Override default automatic customer creation settings
 - ☒ Find customer using email address when customer mapping left empty
 - ☒ Automatically generate customer reference when no match
 - Prefix: Next Number: [Options](#)
 - ☐ Use existing account when no match
 - Account:
- ☐ Create Sicon CRM End User Record Sicon CRM End User Options
 - ☐ Create new Sales Ledger account based on number of Sicon End Users
 - Max End User accounts per Customer:

At the bottom of the window are 'Save' and 'Cancel' buttons.

Channel Options – Customers tab

Tick **Override default automatic customer creation settings** to give this channel its own customer matching and creation settings. The fields are the same as on **Settings ► Customers** (section 3.8), including **Options** for the tax code and price band of new accounts (section 5.2) and **Sicon CRM End User Options** (section 5.11).

Shipments tab



The screenshot shows the 'Channel Options' window with the 'Shipments' tab selected. The window has a title bar with a green icon and the text 'Channel Options'. Below the title bar is a tabbed interface with 'Orders', 'Customers', 'Shipments', and 'Inventory'. The 'Shipments' tab is active. The main content area contains several settings:

- ☒ Carrier Mandatory
- ☒ Tracking Mandatory
- ☐ Tracking URL Mandatory
- ☐ SSCC Mandatory
- ☐ Enable eDesk Integration
- Number of days after invoice production to redact delivery address details:

At the bottom of the window are 'Save' and 'Cancel' buttons.

Channel Options – Shipments tab

Field	What it does
Carrier Mandatory, Tracking Mandatory, Tracking URL Mandatory, SSCC Mandatory	A shipment is only sent to the channel once it has a carrier, a tracking number, a tracking link and – for SSCC Mandatory – an SSCC on every carton. Shipments that are missing them wait on the Shipment List (section 13.2).
Enable eDesk Integration	Send each shipment's courier and tracking number to eDesk, using the eDesk details on Settings ► Shipping (section 3.7).
Number of days after invoice production to redact delivery address details:	Used by the channel's Clear Invoiced Delivery Details job: once a completed order was invoiced this many days ago, the name, address, email address and phone number on its delivery address are removed (the name becomes "PII REDACTED") – for channels whose terms limit how long you may keep the end customer's details.

Important: Removing delivery details cannot be undone. Add the **Clear Invoiced Delivery Details** job to a job bag only for channels whose terms require it, and check the number of days first.

Inventory tab

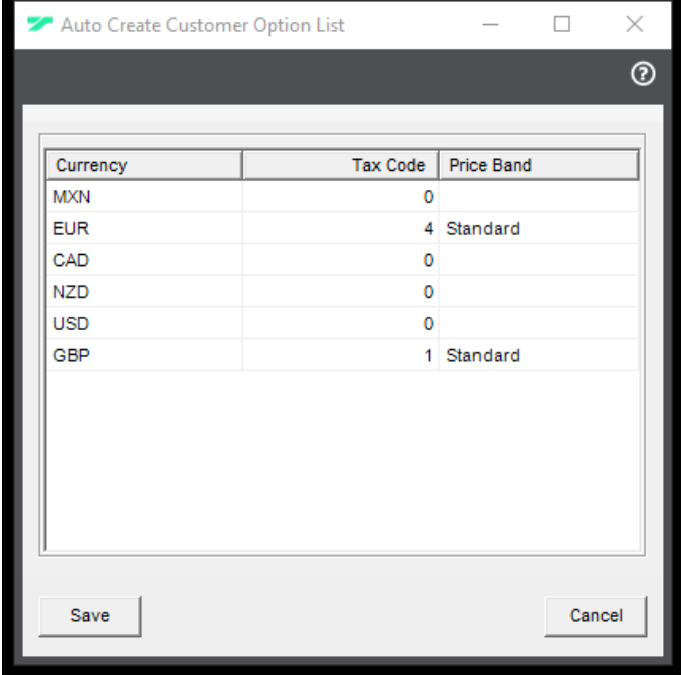
Channel Options – Inventory tab

Field	What it does
Match items using channel identifier rather than SKU	Match the channel's listings to Sage items by the channel's own item identifier.
Additional inventory buffer:	Hold back this quantity of every item from this channel, on top of the buffer on Settings ► Inventory .
Replace system-wide inventory buffer	Use this channel's buffer instead of the Settings buffer.
Restrict to specific warehouses and Warehouses	Send stock from the chosen warehouses only (Warehouses opens Specific Inventory Warehouses , section 9.4).
Include virtual warehouses and Virtual Warehouses	Add the stock held by the chosen Third Party Logistics channels (section 9.4).

Section 11.1 explains how these combine with the snapshot settings.

5.2 Options for automatically created customers

Options next to **Automatically generate customer reference when no match** (on **Settings** ► **Customers**, or on a channel's **Customers** tab) opens the **Auto Create Customer Option List**. It has one row per currency in Sage.



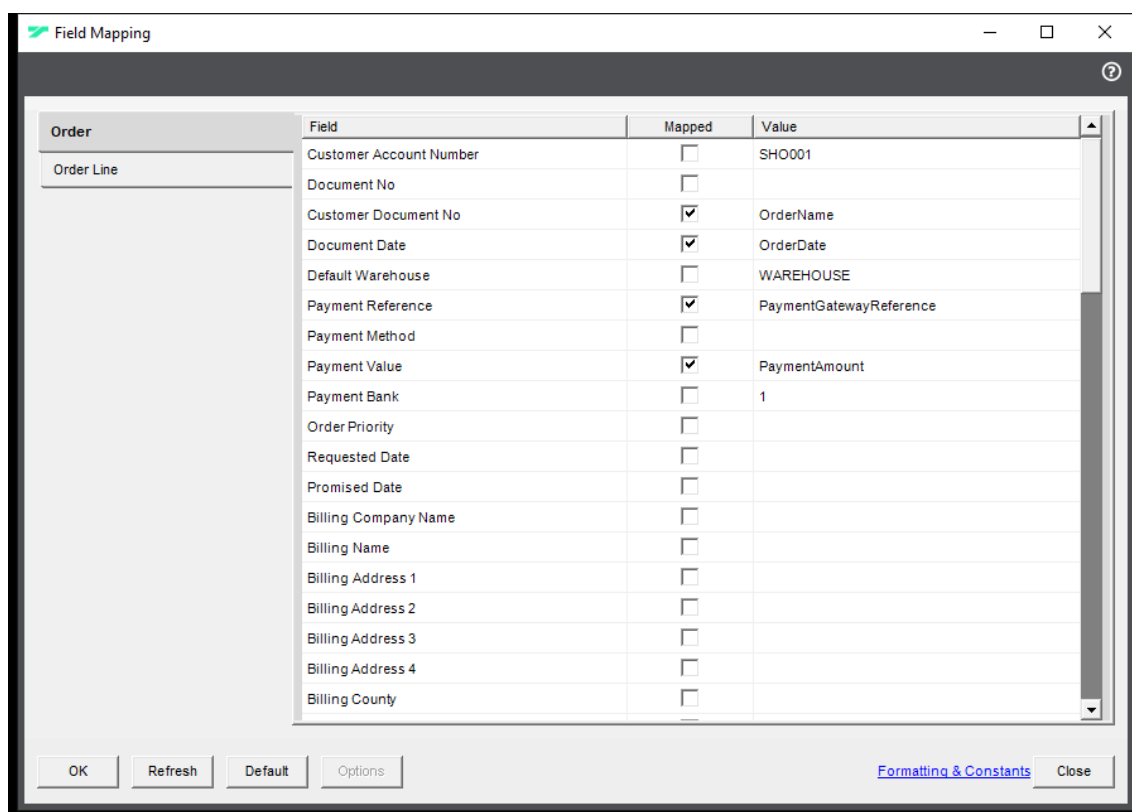
Currency	Tax Code	Price Band
MXN	0	
EUR	4	Standard
CAD	0	
NZD	0	
USD	0	
GBP	1	Standard

Auto Create Customer Option List

For each **Currency**, choose the **Tax Code** and **Price Band** that a customer account created by Channels in that currency should have, then click **Save**. Two more windows opened from Channel Options – **Sicon CRM End User Options** and **Balancing Invoice / Credit Options** – are described at the end of this chapter (sections 5.11 and 5.12).

5.3 Field mapping

Field mapping tells Channels where each Sage-side value comes from. Open it with **Value Mapping** ► **Fields** on the **Customisation** page.



Field Mapping

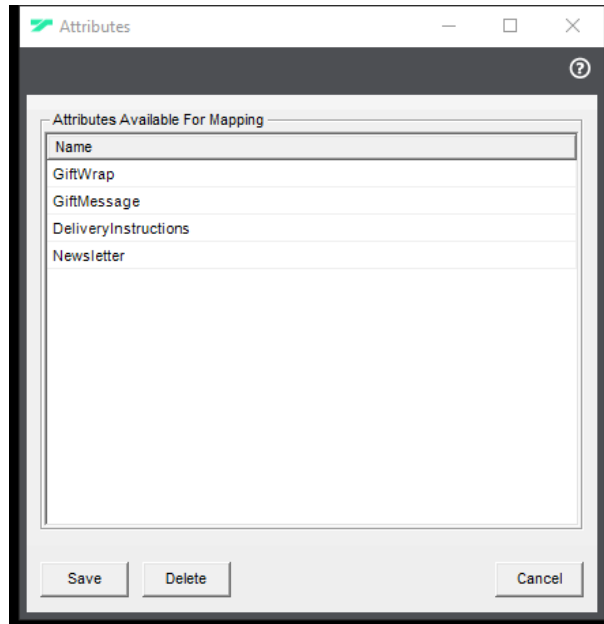
There is one tab per kind of document: **Order** and **Order Line** for most channels; for file-based channels one tab per file you have switched on (for example **Shipment** or **Invoice**); and for a Third Party Logistics channel one tab per document exchanged with the warehouse. Each row is one field:

Column	What it does
Field	The Sage-side field (for orders, the fields on Settings ► Mapping ; for files, the template's columns).
Mapped	Yes: the value comes from a field of the channel's order (or of the Sage document, for files Channels writes). No: the value is the fixed text you type.
Value	With Mapped = Yes, choose the channel field from the drop-down list. With Mapped = No, type the constant – for example a customer account reference, a warehouse name or true for Tax Inclusive . Leave it empty for a field you do not need.
Format	For files and messages Channels sends only: how to format the value (section 5.4).

Button	What it does
OK	Keeps your changes.
Close	Closes without keeping the changes made in this window.
Default	After “Are you sure you want to remove all the current mappings and replace with the default set?”, replaces every mapping with the channel type's standard set. This happens at once. Not available for file-based channels, whose columns come from your templates.
Refresh	Brings in fields added on Settings ► Mapping since the channel was set up, and removes fields that have been deleted there.
Options	Third Party Logistics only, on the inbound acknowledgement field AcknowledgementResponse : the reply value that means the warehouse accepted the order (Channel Reference, chapter 30).
Formatting & Constants	Opens the formatting help (section 5.4).

Attributes

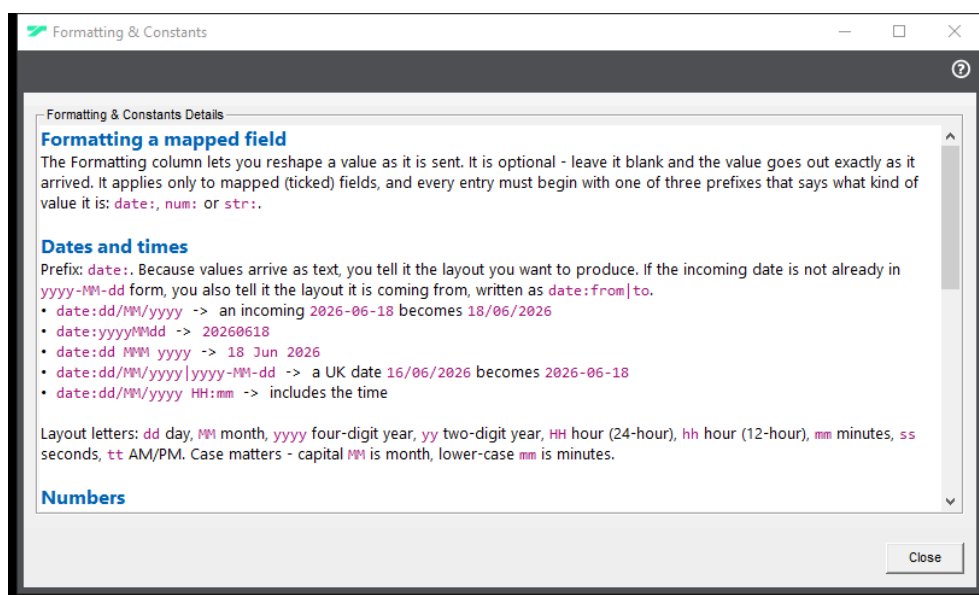
Some channels send extra order values (“attributes”) that are not in Channels' standard field list – custom fields of a web store, gift wrap, delivery instructions and so on. To be able to map them, click **Attributes** on the channel's **Customisation** page, type one attribute **Name** per row under **Attributes Available For Mapping** and click **Save**. Each name then appears in the **Value** list of the field mapping with an @ in front (for example @GiftWrap), so you can map it to a Sage field. **Delete** removes the selected attribute; **Cancel** closes the window. The values a channel order carries are also kept with the Sage order as attributes (section 16.1).



Attributes

5.4 Formatting and constants

The **Formatting & Constants** link in Field Mapping (and in the Products and Customers feed designers) opens a reference of the formats you can type in the **Format** column and the constants you can use as values.

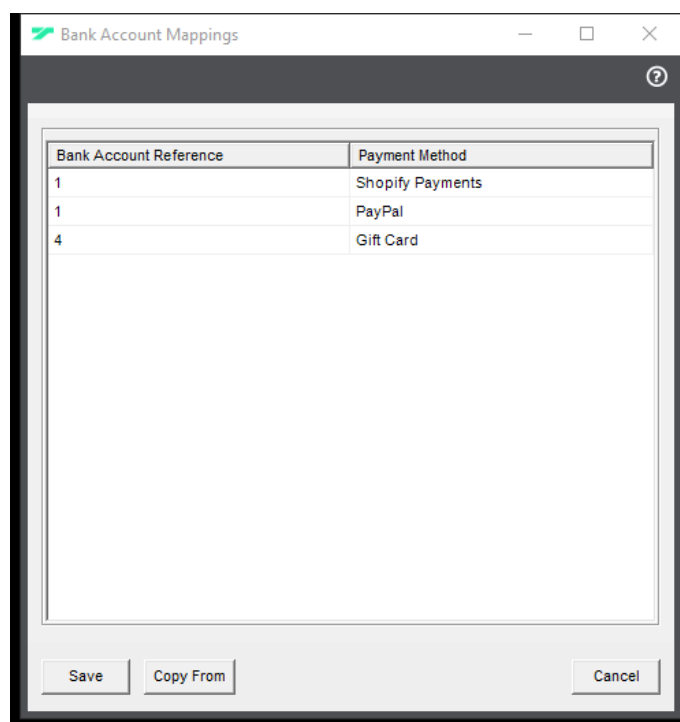


Formatting & Constants

Entry	Example and result
date: layout	date:dd/MM/yyyy turns 2026-06-18 into 18/06/2026; date:yyyyMMdd gives 20260618; date:dd MMM yyyy gives 18 Jun 2026. If the value is not in yyyy-MM-dd form, give its layout first: date:dd/MM/yyyy yyyy-MM-dd turns 18/06/2026 into 2026-06-18. dd day, MM month, yyyy/yy year, HH/hh hour, mm minutes, ss seconds, tt AM/PM – capital MM is month, small mm is minutes.
num: pattern	num:#,##0.00 turns 1234.5 into 1,234.50; num:0.00 gives 1234.50; num:000000 turns 625 into 000625. Do not use num: on product codes, SKUs or barcodes – use str:padleft instead.
str: steps	str:upper , str:lower , str:trim , str:left(10) , str:right(4) , str:padleft(6,'0') , str:replace('-', '') , str:default('N/A') (value to send when empty). Chain steps with , for example str:trim upper .
Constants	For a field that is not mapped, the fixed text you type is sent as it is. These tokens are filled in when the file or message is built: [DATE] (today), [TIME] (the time now), [DATETIME] (both) and [GUID] (a new unique identifier).

5.5 Value mapping

Value mappings translate a value between Sage and the channel – for example the channel's payment method into a Sage bank account, or your Sage courier into the carrier name the channel expects. Open them from **Value Mapping** on the **Customisation** page. **Services** opens its own window (section 5.6).



Value mapping – Bank Account Mappings

Menu item (window title)	Columns	What it does
Bank Accounts (Bank Account Mappings)	Bank Account Reference / Payment Method / Bank Currency	The Sage bank account that receives payments made with each channel payment method. Add one row per payment method and currency: Channels uses the mapped bank held in the order's currency (shown read-only in Bank Currency) and reports an error if the payment method has rows but none in that currency.

Menu item (window title)	Columns	What it does
Couriers (Courier Mappings)	Analysis Code / Channel Value	The carrier name or code to send to the channel for each value of your courier analysis code. An order with no courier is never mapped to one – with Carrier Mandatory ticked its shipment waits until a courier is entered.
Tax Codes (Tax Code Mappings)	Tax Code / Channel Value	The Sage tax code to use for each tax code or rate the channel sends on its lines.
Units (Unit Mappings)	Unit / Channel Value	The Sage selling unit for each unit the channel sends.

Type one row per value and click **Save**; a row with both columns empty is removed. **Cancel** closes the window. For a Third Party Logistics channel connected by API, the Couriers columns are **Sage Courier** and **Shipping Method** and both offer drop-down lists of the valid values.

Copy From copies the same kind of mapping from another channel: choose the **Channel:** and click **OK**. The copy replaces this channel's existing mappings of that kind.

5.6 Shipping service mapping

Value Mapping ► Services opens **Shipping Service Mapping**, which translates the carrier service held in your ship service analysis code (**Settings ► General**) into the service name the channel expects.

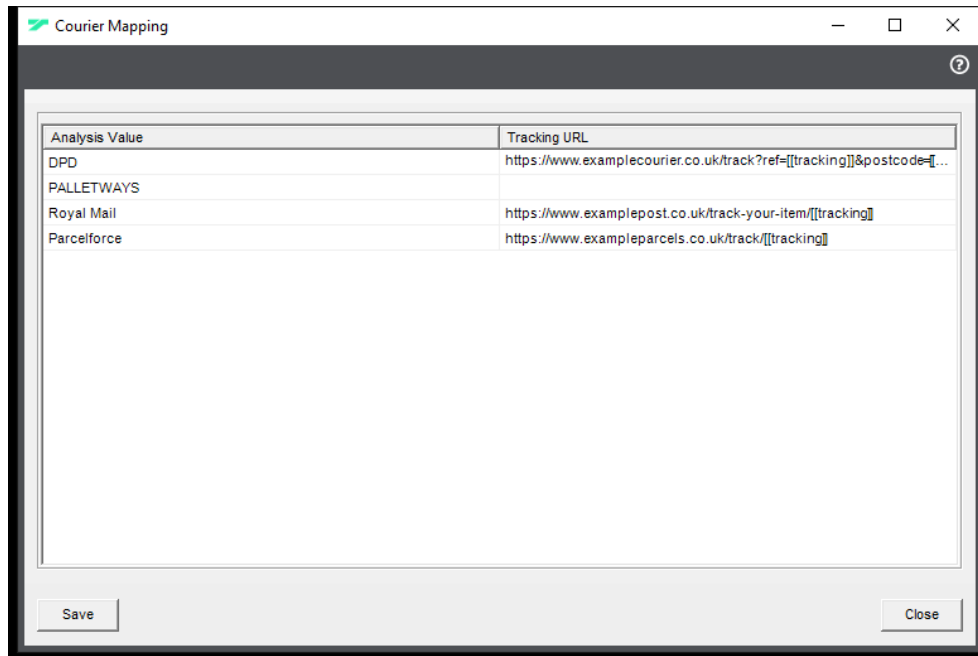
Analysis Value	Channel Value	Default Tracking	Tracking Code
RM Tracked 24	Royal Mail Tracked 24	☐	
RM Tracked 48	Royal Mail Tracked 48	☐	
RM Special Delivery 1pm	Special Delivery Guarant...	☐	
Click & Collect	Store Pickup	☒	COLLECTED

Shipping Service Mapping

Field or button	What it does
Analysis Value	The value of the ship service analysis code on the Sage order.
Channel Value	The service to send to the channel. For CS-Cart you choose from the store's shipping methods.
Default Tracking and Tracking Code	For a service without tracking: set Default Tracking to Yes and enter the text to send as the tracking number in Tracking Code (or leave it empty). Shipments with this service are then sent without needing a tracking number.
Save	Saves the rows. A row with neither value is removed.
Copy From	Replaces this channel's service mappings with another channel's.
Cancel	Closes without saving.

5.7 Courier tracking links

Settings ► **Mapping** ► **Couriers Tracking URLs** opens **Courier Mapping** (the settings are saved first). It lists every value of your courier analysis code (**Analysis Value**); rows are added and removed to match the analysis code's values each time you open it. The **Courier analysis code**: on **Settings** ► **General** must be chosen first ("You need to choose your courier analysis code first"). Enter the courier's tracking web address in **Tracking URL** and click **Save**.



Courier Mapping

In the address, these placeholders are replaced when the link is built:

Placeholder	Replaced by
[[tracking]]	The shipment's tracking number.
[[postcode]]	The delivery postcode (or the customer's postcode when the order uses the invoice address).
[[documentno]]	The Sage order number.
[[customerdocumentno]]	The customer's (channel's) order number.

For example [https://www.examplecourier.co.uk/track?ref=\[\[tracking\]\]&postcode=\[\[postcode\]\]](https://www.examplecourier.co.uk/track?ref=[[tracking]]&postcode=[[postcode]]). Channels sends the link to channels that accept one and uses it in customer notifications. When the links are built is described in section 13.4.

5.8 Country tax codes

Settings ► **Mapping** ► **Tax / Registration Codes** opens **Country Tax Codes**, used when **Use EU retail tax mappings** is ticked on **Settings** ► **International** (section 3.9).

Customer Country Code	EU Tax Code	Non EU Tax Code
IE	1	0
FR	1	0
DE	1	0

Unlisted Tax Code:

Save Cancel

Country Tax Codes

Field	What it does
Customer Country Code	The customer's country (billing country, or delivery country if you chose that on Settings ► International), for example IE .
EU Tax Code	The Sage tax code number to use when the order is delivered within the EU.
Non EU Tax Code	The Sage tax code number to use when it is delivered outside the EU.
Unlisted Tax Code:	The tax code number for a country that has no row.

Save checks every row – “Country code 'XX' does not exist” or “Tax code '9' does not exist” tells you which value to correct.

5.9 Scripting

A web hook's payload fields can be calculated by a short script instead of being mapped directly (section 8.6). The **Scripting** window is where you write and test it.

Script Editor

```
return entity["AnalysisCode17"].ToUpper() == "SUBSCRIBED" ? "True" : "False";
```

Test Scripting Information Test Data

Results

Save Cancel

Scripting

Field or button	What it does
Script Editor	The script. Scripts are written in C# and must always return a value; the mapped fields are available as entity , for example return entity["AnalysisCode17"].ToUpper() == "SUBSCRIBED" ? "True" : "False"; .
Scripting Information	Shows that guidance and example.
Test Data	Opens Scripting Test Data , where you type a sample Value for each field Name and click OK .

Field or button	What it does
Test	Runs the script against the test data and shows the result under Results .
Save / Cancel	Keep or discard the script.

Always click **Test** before **Save** – a script that fails stops the web hook from being sent.

5.10 End points and their authentication

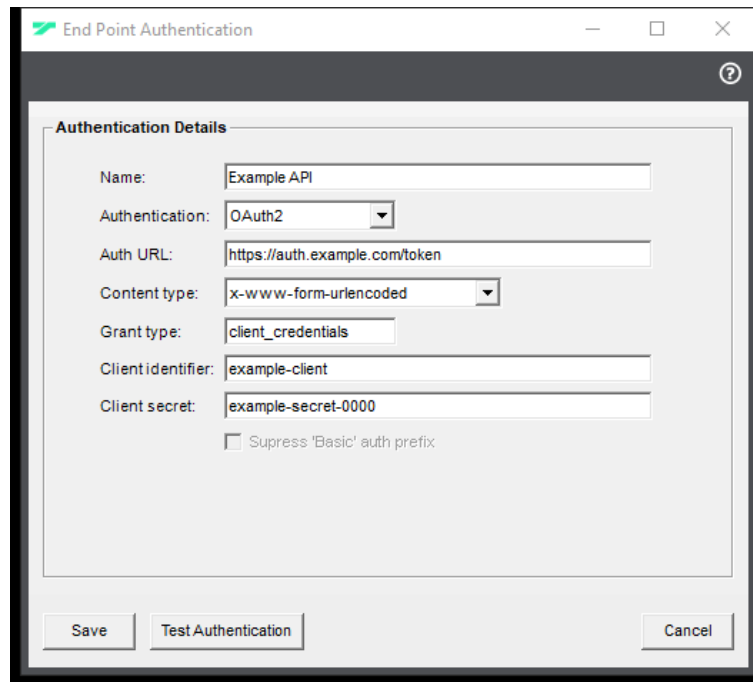
Channels can post files and messages to a partner's web address (an **end point**): outgoing web hooks (section 8.2), the REST end point page of Text File and Third Party Logistics channels (Channel Reference, chapters 29 and 30), and the end point recipients of stock, product and customer feeds (sections 11.5, 12 and 7). They share two windows.

End Point Recipient

End Point Recipient

Field	What it does
End point URL:	The full web address, for example https://api.example.com/stock . Must start with http:// or https://.
REST method:	POST, PUT or PATCH.
Authentication: with + and ...	The login the partner requires. + creates a new one and ... edits the one selected (below).
Request body:	Leave empty to send the file as it is. Otherwise type the body the partner expects (up to 2,000 characters) and put [FILE] or [FILE_BASE64] where the file's contents belong.
Customer: and Only include items with customer codes	Stock feeds only: the customer the feed is for, and whether to send only items that have that customer's own codes.

End Point Authentication



End Point Authentication

Field	What it does
Name:	A name to pick it by.
Authentication:	Basic (user name and password), OAuth2 (a token obtained from the partner's token address) or Token (a fixed bearer token).
Auth URL:, Content type:, Grant type:	OAuth2 only: the token address, the format of the token request and the grant type the partner specifies.
Client identifier: / Client secret:	The user name and password (Basic) or client id and secret (OAuth2). For Token , the secret box holds the token.
Suppress 'Basic' auth prefix	Basic only: send the credentials without the word "Basic", for partners that require it.

Test Authentication (OAuth2 only) asks the partner for a token and shows "Authentication Test Successful". **Save** keeps the authentication so other end points can use it.

5.11 Sicon CRM end user options

If you use Sicon CRM, Channels can create a CRM end user record for each converted order's buyer and link it to the sales order. Tick **Create Sicon CRM End User Record** in the customer options – on **Settings ► Customers** (all channels) or on a channel's **Customers** tab of Channel Options (that channel only) – then click the **Sicon CRM End User Options** link.

Field	What it does
Data Field:	The mapped order field that identifies the end user – usually the buyer's email address.
Anl Code Slot Index:	The sales order analysis code that receives the identifier.
Source:	The Sicon CRM source given to new people.
Contact Info Type:	The Sicon CRM contact information type.
Person Status:	The Sicon CRM person status given to new people.

Click **Save**, then **Close**. The options must be set before orders are converted: “You need to setup the default Sicon CRM End User Options first” (all channels) or “You need to setup the channel specific Sicon CRM End User Options for <channel> first”. This window needs Sicon CRM to be installed in the company.

5.12 Balancing invoice / credit options

When a channel pays you a different amount from the Sage order total (rounding, a voucher, a small price difference), Channels can post the difference so the order's receipt balances. On the channel's **Orders** tab of Channel Options, tick **Create balancing invoice/credit where receipt value differs to SOP order total** and click the **options** link.

Balancing Invoice / Credit Options

Field	What it does
Maximum Value:	The largest difference that will be balanced. Leave 0 for no limit. Larger differences are left for you to deal with.
Specify nominal account and the nominal account	Post the balancing invoice or credit to this nominal account instead of the customer's default.

Click **Save**; the options are stored when you save the channel. When the receipt is posted, a paid amount above the order total creates a sales ledger invoice, and a paid amount below it creates a credit note, for the difference including VAT. The reference is the order's customer document number followed by **V**, and it is linked to the sales order.

6. Orders – downloading, checking and converting to Sage

Every channel that sends you orders uses the same order screens and the same conversion into Sage 200 sales orders. This chapter describes those shared parts. Anything that is special to one channel (its own search options, which statuses it downloads, how it acknowledges or cancels) is described in that channel's chapter of the **Channels – Channel Reference**.

6.1 How an order moves through Channels

Each order goes through the same stages, whether you work it by hand or a job bag does it for you:

1. **Download.** Channels collects new orders from the marketplace, web store, EDI partner or file folder. This happens when you click **Find** on the channel's order list, or when a job bag runs the channel's download automation (see section 15).
2. **Stored.** Each downloaded order is kept, exactly as the channel sent it, as a stored order waiting to be converted. Stored orders are what you see on the order list. Nothing has been created in Sage 200 yet.

3. **Mapped.** When the order is converted, the channel's field mappings (section 5.3) turn the channel's fields into Sage values – customer account, addresses, item codes, quantities, prices, tax and so on.
4. **Converted.** A Sage 200 sales order (or sales return) is created and confirmed. The stored order leaves the order list and is linked to the Sage order, so that later stages know which channel order it came from.
5. **Acknowledged.** Where the channel expects it, Channels tells the channel that the order has been accepted (section 6.11).
6. **Despatched and shipped.** When you despatch the order in Sage 200, Channels sends the despatch, tracking and (where the channel needs them) invoice details back to the channel (section 13).

Every stage writes an event on the Sage order's **Channels** tab (Order Created, Receipt Created, Auto Acknowledged, Order Changed and so on), so you can always see what happened to an order and when. See section 16.1 for that tab.

Most sites let job bags download and convert orders automatically every few minutes and only use the order list to deal with the orders that need attention. You can do everything by hand from the list as well.

6.2 The order list

Each channel type has its own **Order List** on its menu (for example **Channels ► API ► Order List** for orders posted to the Channels API). All of them look and work the same way.

The screenshot shows the 'Order List' window. At the top, there's a 'Channels' section with a search box and a 'Find' button. Below it is a table of orders. The table has columns: Channel, Order Number, Recipient, Date, Postcode, and SOP Order. The table lists several orders, some of which are highlighted in green or red. At the bottom of the window are buttons for 'Edit', 'Enable', 'Check', 'Invert', 'Convert', 'Import', 'Remove', and 'Close'.

Channel	Order Number	Recipient	Date	Postcode	SOP Order
☒ Web Orders	WEB-10021	Jane Example	02/10/2026	LS1 1AA	
☐ Web Orders	WEB-10022	Sam Sample	01/10/2026	YO1 7HH	
☐ Web Orders	WEB-10023	Alex Example	30/09/2026	BS1 4DJ	0000005121
☐ Web Orders	WEB-10024	Priya Example	30/09/2026	M1 1AE	0000005122
☐ Web Orders	WEB-10025	Tom Example	01/10/2026	CF10 1EP	
☒ Web Orders	WEB-10026	Ruth Sample	02/10/2026	LS2 7EW	
☐ Trade Portal	TP-5001	Chris Example	02/10/2026	M3 2BW	
☐ Trade Portal	TP-5002	Morgan Sample	02/10/2026	CH1 1NQ	

An order list (the API Order List) with orders waiting to be converted

The screen has three parts:

- The **Channels** box at the top lists the channels of this type that are enabled, all ticked when the screen opens, with the channel's search options and the **Find** button. Click **Clear** to untick every channel.
- The **Orders** box lists the orders waiting to be converted for the ticked channels.
- The buttons under the list (**Edit**, **Enable**, **Check**, **Invert**) and along the bottom (**Convert**, **Import**, **Remove**, **Close**).

A channel shown with a line through its name has **Default to not download orders** ticked in its Channel Options (section 5.1). Its stored orders are still listed, but **Find** does not download new orders for it.

Columns

Column	What it shows
Channel	The channel the order came from.
Order Number	The channel's own order number.
Recipient	The name the order is to be delivered to.
Date	The order date sent by the channel.
Postcode	The delivery postcode.
SOP Order	The Sage sales order number, once there is one. Click it to open the order in Sage's View Order Details (or the return in View Return Details). It is filled in after you convert an order, and for orders that already exist in Sage – for example an order the channel has sent again, or a change to an order you have already converted.

The 3PL inbound lists also show a **Last Error** column with the reason the last attempt failed (Channel Reference, chapter 30).

Colours and tick boxes

What you see	What it means
White row, tick box available	A new order waiting to be converted.
Pale red (pink) row	The order failed the last time anyone (you or a job bag) tried to convert it. Hover over the row to see why. You can still tick it and convert it again once the problem is fixed.
Dark red row	The order failed when you converted it just now. Hover over the row to see why.
Greyed tick box	The order cannot be converted as it stands: it is already in Sage (the SOP Order column shows the order), or it is a change to an order that has not been converted yet. Convert the original order first, or remove the duplicate (section 6.10).

6.3 Finding new orders

Tick the channels you want and set the search options, then click **Find**. On every channel that connects to a marketplace, web store or partner, **Find** contacts the channel straight away and downloads the orders it finds; the list then shows everything waiting for the ticked channels, not only the orders just downloaded.

Field	What it does
New orders	Ticked when the screen opens. Downloads every order the channel says is new or not yet collected. Ticking it clears the other options.
Orders Between: (from and to dates)	Downloads the orders placed between the two dates, including orders you may already have. If you leave the second date empty, today is used. Choosing a date unticks New orders .
Specific order box	Downloads one order by its channel order number. Typing a number unticks New orders and clears the dates.

Some channels have extra search options (for example only unfulfilled orders), and file-based channels caption the button **Download and Import** – it collects the files from the FTP site or folder and reads them. The exact options for each channel are in the Channel Reference.

Orders that are already stored are not stored twice. If a channel sends again an order you have already converted, it appears on the list with its **SOP Order** filled in and without a tick box, so that it cannot be converted twice by mistake.

The **API Order List** has no search options: orders are posted to Channels by the other system, so **Find** only refreshes the list (section 8.7).

When **Use responsive operations** is ticked on **Settings ► General** (section 3.1), long jobs – **Find**, **Convert**, **Remove** and **Create Feed** – run in a progress window that you can cancel. Anything already finished when you cancel stays done; run the job again to pick up the rest.

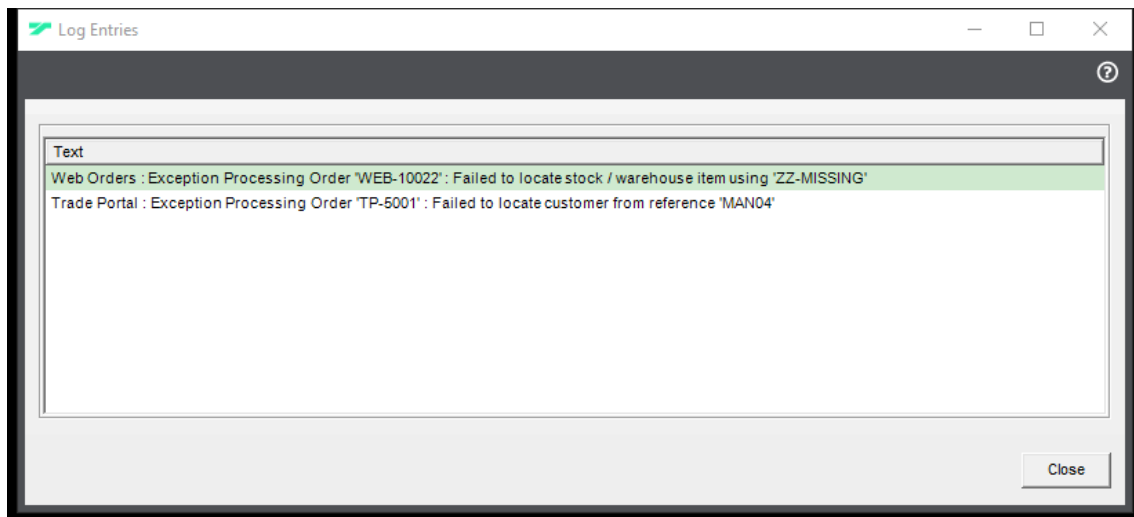
6.4 The buttons

Button	What it does
Edit	Opens the highlighted order so that you can correct it before converting it (section 6.9).
Enable	Gives the highlighted rows a tick box again, even if Channels has decided they should not be converted (for example a genuine repeat order that Channels thinks is a duplicate). Use it with care.
Check	Ticks the highlighted rows. Highlight rows with the mouse, Shift or Ctrl, or press Ctrl+A in the list to highlight them all. Up to 2,000 rows can be ticked at once (“Maximum of 2000 checked”).
Invert	Swaps the ticks on the highlighted rows.
Convert	Converts every ticked order into Sage 200 (section 6.5).
Import	On channels that work with files (EDI, Text File, Very and Virtual Stock) reads order files you have saved yourself: choose the Channel: and the Import File: (use ... to pick one or more files), then click OK . See the Channel Reference for the file formats.
Remove	Takes the ticked orders off the list without converting them (section 6.10).
Close	Closes the list.

6.5 Converting orders

1. Tick the orders you want to convert (or highlight them and click **Check**).
2. Click **Convert**. Channels works through the orders one by one, showing “Converting 3 order(s)...” and the order it is working on.
3. Each order that converts drops its tick and shows its new Sage order number in **SOP Order**. Each order that fails turns dark red; hover over it to read the reason.
4. If anything went wrong, a **Log Entries** window opens when the run finishes, listing every error raised during the run – for example “Shopify Web Store : Exception Processing Order '#1042' : <reason>”. Read it, then click **Close**.

Each order is saved on its own, so one failure never stops or undoes the others. Click **Find** (or close and reopen the list) to clear the converted orders from the list. The errors in **Log Entries** are also written to the Channels log; the window itself keeps nothing once it is closed.



Log Entries – the errors raised while converting

6.6 How a channel order becomes a Sage sales order

The conversion is driven by the channel's field mappings (section 5.3): each Sage field below is filled from the channel field (or fixed value) you map to it. Most channels come with sensible default mappings, so you only change the ones you need. The Sage-side field names are the master list on the **Mapping** tab of Settings (section 3.14). The Channel Options named below are described in section 5.1.

Order fields

Mapped field	What Channels does with it
Customer Account Number	The Sage customer account the order is raised on. If it is left empty, Channels can find or create the customer instead (see Customers below).
Customer Document No	The customer's order number on the Sage order. It is also what Channels uses to spot duplicate orders and to find the order again for changes.
Document Date, Requested Date, Promised Date	The order date and the requested and promised delivery dates. Lines without their own dates take the order's dates.
Order Priority	The Sage order priority; if empty, the customer's own priority is used.
Default Warehouse	The warehouse for the order (by warehouse name). Lines can override it.
Tax Inclusive	true or false – whether the prices sent by the channel include VAT. Retail channels usually send VAT-inclusive prices.
Delivery Description, Delivery Company Name, Delivery Name, Delivery Address 1 to 4, Delivery City, Delivery County, Delivery PostCode, Delivery Country Code, Delivery Phone Number, Delivery Fax Number, Email Address, Contact	The delivery address on the order. A company name, when there is one, is used as the postal name. Postcodes are put in capitals, phone numbers are tidied to digits, and country codes UK/GBR and USA are read as GB and US. If the order has no email address or phone number, the defaults on the Shipping tab of Settings are used, unless the channel's options turn this off.
Billing Name, Billing Company Name, Billing Address 1 to 4, Billing City, Billing County, Billing PostCode, Billing Country Code	The invoice address for the order, when the channel sends one.
Billing Email Address, Billing Phone Number, Currency ISO Code	Used to find or create the customer when no account number is mapped.
Discount Value, Discount Text, Surcharge Value	An order-level discount or surcharge. Channels converts the value into the order's discount (or surcharge) percentage, or – if the channel option Order level discount creates negative free text line is ticked – adds a negative free-text line described by Discount Text (default “Order Discount”).

Mapped field	What Channels does with it
Shipping Value, Shipping Discount Value, Shipping Method, Shipping Tax Code	The carriage line (see Carriage below). The names are the defaults chosen on the Shipping tab of Settings.
Payment Method, Payment Value, Payment Reference, Payment Bank	Payment taken by the channel (see Payments below).
Your SOP analysis code names	Any mapping field named like one of your Sage order analysis codes fills that analysis code. Use Refresh Analysis Codes on the Mapping tab of Settings to add them to the list.

Line fields

Mapped field	What Channels does with it
Item Code	The channel's SKU. Channels finds the Sage item by code or barcode, using your stock aliases where the channel's SKU differs from yours (section 9.1). If the code matches a bundle, the bundle's component items are added instead (section 9.2).
Quantity	The quantity ordered. Lines with a quantity of zero (for example a line the customer cancelled before it was sent) are left out.
Unit Price	The selling price per unit. Leave it unmapped to use the Sage price book; a mapped price of 0 sells the item free of charge.
Discount Value, Discount Percent	A discount per unit, or a percentage. With neither, the customer's own discounts in Sage apply (unless the channel's Disable Customer discounts option is ticked). Items set to be excluded from SOP line discounts never get a discount.
Tax Code	The Sage tax code number for the line. A channel value mapping for tax codes (section 5.5) can translate the channel's own codes. If no line tax code is sent, the customer's (or, where appropriate, the item's) tax code is used.
Warehouse, Bin	Take the line from a particular warehouse, and allocate it from a particular bin.
Description	Replaces the item's description on the line.
Unit	The selling unit (for example a pack). A channel value mapping can translate the channel's units. If none is sent, the unit set on the stock alias is used.
Unit Cost	The cost price on the line (used for free-text lines and to override the item's cost).
Nominal Account, Cost Centre, Department	The revenue nominal code for the line; otherwise Sage's normal rules apply.
Despatch Note Comment, Picking List Comment	Comments printed on the despatch note and picking list; otherwise the item's default comments are used.
Allocated	How much of the line to allocate when Sage allocates stock on order entry.
Requested Date, Promised Date	Line delivery dates.
Line Number	The line's print order on the Sage order. When mapped, the channel option Sort lines by item code is ignored.
Line Type	Leave unmapped for normal stock lines. It lets a channel send free-text lines, comment lines and additional charges as well.

Customers

Most business-to-business channels map **Customer Account Number** to a fixed account or to a value the channel sends. For retail channels, where every order is from a different person, leave it empty and let Channels find or create the account with the options on **Settings ► Customers** (section 3.8) or the channel's own **Customers** tab (section 5.1):

- with **Find customer using email address when customer mapping left empty**, Channels looks for a customer contact with the order's billing email address (or, if it has none, its email address) in the order's currency;

- if none is found, **Automatically generate customer reference when no match** creates a new account from the order's billing (or delivery) name and address, or **Use existing account when no match** puts the order on the account you chose.

If the order's account is on hold, Sage 200's own on-hold rules apply. With the channel option **Allow orders for held customers** ticked, Channels releases the account just long enough to raise the order and then puts it back on hold; with **Place order on hold** also ticked, the new order is put on hold too.

Items, warehouses and stock

- An item that cannot be found stops the order, unless the channel option **Missing SKU creates free text line** is ticked; then a free-text line is added showing the SKU and description, so that you can sort it out in Sage.
- Items are looked for in the warehouses ticked on **Settings ► Inventory**. If the item is not in the order's warehouse, the channel option **Allow warehouse switching where item doesn't exist in default warehouse** moves the line to the first of those warehouses that holds it; **Allow warehouse switching where item exists in default warehouse but no free stock** also moves lines with no free stock to the first warehouse that has some.
- Items sold direct to the customer go on the direct-delivery warehouse, ready for a back-to-back purchase order.
- When stock is short, Channels can add the missing quantity (channel option **Add inventory if insufficient quantity free in warehouse**), take stock you have allocated to the customer (**Settings ► Stock**, section 3.3), or build out-of-stock bills of materials (**Settings ► Stock**, unless the channel's **Disable BoM Build & Allocate** is ticked).
- When Sage is set to allocate stock on order entry, lines are allocated as they are added. Items whose product group allows negative stock are allocated in full unless **Disable negative stock allocations** is ticked.
- Lines are added in the order the channel sends them. With the channel option **Sort lines by item code** ticked, the finished order is renumbered so the stock lines run in item code order, with free text, charge and comment lines after them.

Prices and VAT

- The price sent by the channel is used as it is; with **Tax Inclusive** set to true it is treated as including VAT.
- **Raise warning on incorrect item line price** compares each price with your Sage price book and warns you when it differs (a message on screen, or in the log for job bags). **Override incorrect item line prices with expected price** replaces the channel's price with the price-book price.
- With **Use retail tax mappings** ticked on the channel, the tax code follows the delivery country: your normal code for the UK, and the **EU retail tax code:** or **Non EU retail tax code:** from **Settings ► International** elsewhere (or **Country Tax Codes**, when **Use EU retail tax mappings** is ticked there) – section 3.9.
- When **Order duties enabled** is ticked on **Settings ► International**, a duties amount sent by the channel is added as a free-text line on the duties nominal and tax code.

Carriage

When **Automatically create shipment lines** is ticked on **Settings ► Shipping** (section 3.7) and the channel's **Suppress automatic creation of shipping line** is not ticked, Channels adds a carriage line worth the shipping value less any shipping discount. The line is a free-text line, an additional charge or a stock item, as chosen in Settings; with **Use shipping method field where populated for custom additional charge or stock item**

shipment lines ticked, the order's shipping method picks the additional charge or stock item with that code. A free-text or stock-item carriage line uses the shipping tax code sent by the channel or, if there is none, the tax code of the first order line; an additional charge uses its own tax code. A carriage line is only added when its value is more than zero, so orders with free shipping get none.

Payments and receipts

- When the order carries a **Payment Value** and a bank (mapped directly as **Payment Bank**, or found from the **Payment Method** through the channel's bank-account value mapping), Channels posts a sales receipt for that amount to the customer, in that bank, as soon as the order is created. The receipt shows on the order's **Channels** tab and is allocated to the invoice when the invoice is posted, if **Auto allocate receipts to posted invoices** is ticked on **Settings ► General**.
- When a **Payment Method** is sent but no bank mapping matches it, the payment is recorded as Sage “payment with order” using the Sage payment method of the same name, unless the channel option **Disable payment with order** is ticked.
- **Post payment using sales order total value** posts the receipt for the Sage order's total rather than the value the channel sent.
- **Create balancing invoice/credit where receipt value differs to SOP order total** posts a small sales invoice or credit note for any difference between the payment and the order total (up to the limit set with **options**, section 5.12), so that the account balances.

Notes, gift messages and attributes

- Channels that send notes or gift messages add them to the order as comment lines (and, for gift messages, keep them as an attribute) – see each channel in the Channel Reference.
- Extra information the channel sends that has no Sage field (for example the marketplace's own order id, or a field marked **Attribute** on the **Mapping** tab of Settings, section 3.14) is kept with the order as attributes. You can see them with **Attributes** on the order's **Channels** tab (section 16.1), and they can be used in actions, exports and documents. To map an extra field the channel sends, add its name with **Attributes** on the channel's **Customisation** page (section 5.3).

Duplicates

Before creating an order, Channels checks whether the same customer already has a live order with the same **Customer Document No.** If it has:

- when you convert from the order list, you are asked “Order 'PO12345' for 'WEB001' appears to be a duplicate. Are you sure you want to continue”. **No** leaves the order on the list with “Duplicate order 'PO12345' not processed”;
- when a job bag converts it, the order is not created and is taken off the list (“Blocked order ... when processing as an order with the same reference already exists for that customer”).

Channels where the same order number can genuinely come round again can tick **Allow duplicate order numbers** in Channel Options – and **Only when date differs** to allow a repeat only when the order date is different.

Actions, holds and other add-ons

- Actions (section 10.1) let you change orders as they are converted – for example put certain orders on hold, set analysis codes, add charges or switch channel. They run **Before Processing** (before the order is created; an action can stop the order), **Before Committing** (just before the order is confirmed) or **After Processing** (once it exists).

- Other Tilted add-ons (for example Retail, Carriers and the Sicon CRM integration) are told about every new order so that they can do their own work. **Suppress order raised message** in Channel Options turns this off for a channel.
- Orders for channels linked to a third-party warehouse are released to the warehouse as soon as they are created (Channel Reference, chapter 30).

After the order is created

Channel option	What happens to the new order
Mark converted sales orders as acknowledged	The order is marked as acknowledged (printed) in Sage, so it does not appear on Sage's order acknowledgement run.
Create Sicon Ready to Pick record / Set Ready to Pick true	Creates the order's Sicon ready-to-pick record, and optionally marks it ready to pick.
Complete sales order through to posting of invoice	Allocates the order, acknowledges it (if Sage prints acknowledgements), then – if the order is live and fully allocated – despatches it, invoices it and posts the invoice, dated with the order date. If the order is on hold or not fully allocated, nothing is despatched and a Complete Skipped event explains why. Used for orders the channel has already fulfilled or paid, such as point-of-sale or marketplace-fulfilled orders. The Complete Order / Return action (section 10.5) does the same for chosen orders only.

If something goes wrong

If any part of creating the order fails, Channels cancels the half-made Sage order and leaves the channel order on the list with the reason, so that nothing is created twice. In the rare case where the half-made order cannot be cancelled, it is given an order number and put on hold, and the error tells you “Order '0000123456' will need to be manually cancelled...”: cancel it in Sage, fix the problem and convert again.

6.7 Sales returns

Channels that send returns (see the Channel Reference) list them on the same order list. Converting a return creates and confirms a Sage sales return on the customer; with **Complete sales order through to posting of invoice** ticked the goods are received, the credit note is produced and posted.

6.8 Order changes

Some channels (mainly EDI partners) send changes to orders you have already converted. A change appears on the order list like an order, and can be converted once the original order is in Sage. Converting a change finds the Sage order by the customer and **Customer Document No**, then:

- updates the order's requested and promised dates;
- for each changed line, updates the quantity, price and dates; a quantity of zero removes the line; an item that is not on the order is added;
- records the change (before and after) for the partner's change acknowledgement, and writes **Order Changed, Order Line Amended, Order Line Added** and **Order Line Deleted** events on the order's **Channels** tab;
- re-confirms the order, and cancels it if no lines are left.

A change cannot be applied to an order that has already been despatched. See the Channel Reference, chapter 28 (EDI), for each partner's rules and for how the partner is told the outcome.

6.9 Correcting an order before converting it

If an order fails because of something in the order itself – a mistyped SKU, a missing postcode, a wrong quantity – you can correct it on the list. Highlight it and click **Edit**.

Internal Order									
OrderIdentifier	CustomerAccou...	DocumentNo	CustomerDocum...	OrderDate	RequestedDeliv...	PromisedDeliver...	TaxInclusive	DeliveryDescript...	Delivery
	LON002		WEB-10026	2026-10-02 00:...	2026-10-05 00:...	2026-10-05 00:...	False		Ruth Sa

Lines (3)							
LineIdentifier	SKU	ItemCode	ItemDescription	Quantity	UnitPrice	UnitDiscountPer...	TaxCode
WEB-10026-1	DEC/PAPER/G...	DEC/PAPER/G...		6	14.99	0	
WEB-10026-2	DEC/PAPER/W...	DEC/PAPER/W...		4	14.99	0	
WEB-10026-3	ACS/TOASTER	ACS/TOASTER		1	34.50	0	

Buttons: Delete, Save, Edit Raw, Cancel

Edit Order – the order on top, its lines below

The window's title shows what you are editing and its number, for example **Edit Internal Order - WEB-10026**. The top grid holds the order's own fields and the bottom grid (**Lines**) one row per line, with the channel's own field names. Click a cell to change it. A few fields, such as the order's identifier, cannot be changed.

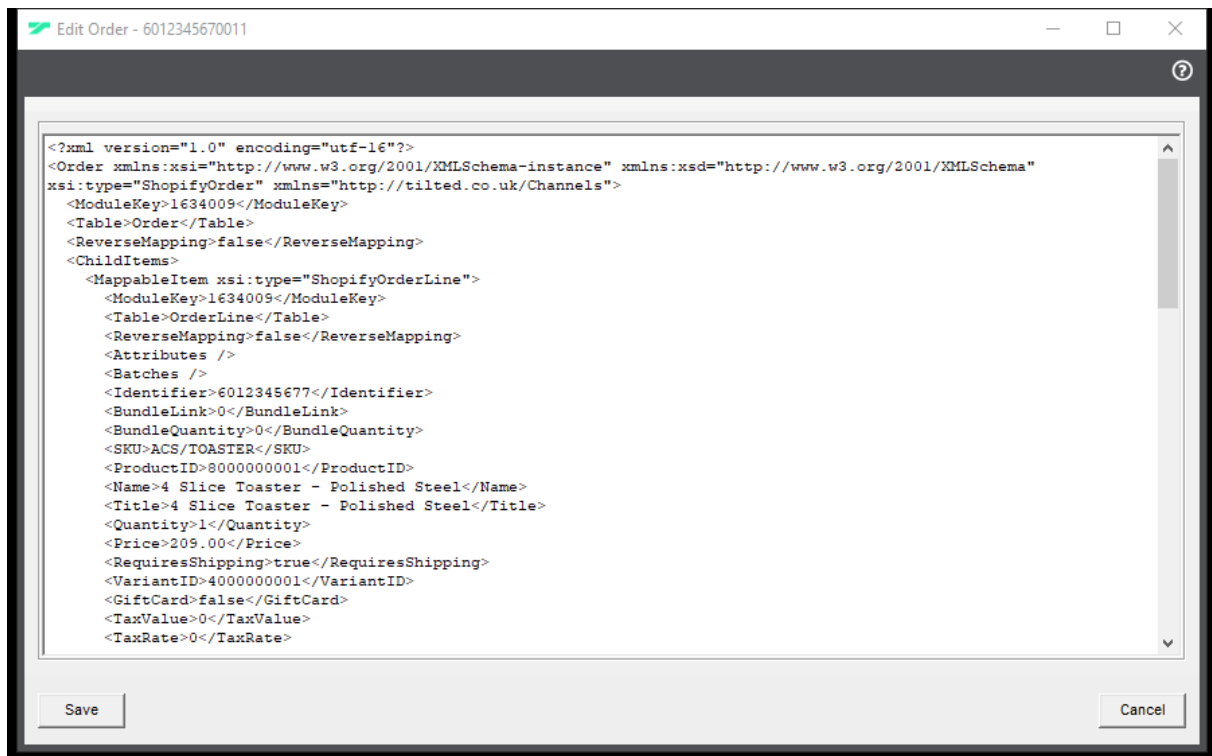
Button	What it does
Delete Line	Removes the highlighted line from the order (it is not removed until you click Save).
Save	Checks every value you changed and saves the corrected order. If a value is not valid nothing is saved and you are told which cell is wrong, for example "Nothing was saved: Line 2, column 'Quantity': a value is required". Dates are entered as yyyy-MM-dd HH:mm:ss.
Edit Raw	Opens the order as text, for changes the grid cannot make (below).
Cancel	Closes without saving.

Then convert the order again from the list. The **Order Number**, **Recipient**, **Date** and **Postcode** columns show what the channel originally sent and do not change when you edit the order.

Correct the order here rather than in the marketplace where you can: a later download does not replace an order that is already stored.

Edit Raw

Edit Raw opens the order's underlying data as text, in a window titled with the order's reference.



Edit order data (Edit Raw)

Correct the text and click **Save**. Channels first checks that the text is still a valid order ("The text is not a valid serialised order"). **Cancel** closes without saving.

Use **Edit Raw** only for changes the grid cannot make, and only if you are confident with the channel's data or Tilted support has asked you to.

6.10 Errors, retries and removing orders

Why an order failed

- On the order list, hover over a pale red or dark red row: the tooltip shows the reason.
- After converting by hand, the **Log Entries** window lists every error from the run (section 6.5).
- Job bags write the reason to the Channels log and send the error emails set up for the job bag (section 15.9).

Section 18 lists the common messages and what to do about them.

Trying again

Once the cause is fixed (for example the item or alias has been set up, or the order has been corrected with **Edit**), tick the order and click **Convert**. A job bag tries a failing order a limited number of times (three by default) and then leaves it for you, so that one bad order is not retried for ever; orders converted from the list are always attempted, however many times they have failed before.

Removing an order

Remove orders you do not want in Sage – a test order, an order you have keyed by hand, or a cancelled order:

1. Tick the orders and click **Remove**.
2. Answer **Yes** to "Are you sure you want to remove the 2 selected item(s)".

3. Type why you are removing them in the **Remove Reason** window and click **OK**. A reason is required (“You need to enter a reason for removal.”).

Remove Reason

A copy of each removed order is kept with the reason, who removed it and when, until it is purged (section 15.11).

Important: Removing an order does not tell the channel anything. If the channel still expects the order to be fulfilled or cancelled, deal with it on the channel as well.

6.11 Acknowledging orders to the channel

Many marketplaces and EDI partners expect to be told that you have accepted each order. Channels does this with acknowledgement feeds, normally from a job bag straight after conversion. Each channel that needs it also has a **Converted Order List**, where you can see which converted orders have not been acknowledged and acknowledge them by hand.

Converted Order List – converted orders searched by date

Field or button	What it does
Channels	The channels of this type, all ticked. Clear unticks them.
Newly converted orders	Ticked when the screen opens: Find lists the converted orders that have not been acknowledged yet.
Orders From:	Lists every converted order dated on or after this date, acknowledged or not. Choosing a date unticks Newly converted orders .
Find	Lists the orders. It reads Channels' own records and does not contact the channel.

Field or button	What it does
Columns	Channel , Order Number (the customer's order number), Document No (the Sage order – click to view it), Date , Customer (the delivery name, or the account name). Orders already acknowledged have no tick box.
Enable, Check, Invert	As on the order list. Use Enable only to acknowledge an order again.
Create Feed	Creates acknowledgement feeds for the ticked orders and reports “2 feeds have been successfully generated.”, adding “1 feeds raised errors whilst processing, check Export Feeds / Errors to resolve.” when any failed. The feeds are then sent as described in section 14.
Close	Closes the list.

Separately from the channel, the channel option **Mark converted sales orders as acknowledged** marks each new order as acknowledged in Sage 200 (section 6.6).

6.12 Delivery booked confirmations (Virtual Stock)

Virtual Stock also needs to be told when a delivery has been booked for an order. Its **Delivery Booked List** (**Channels ► Virtual Stock ► Delivery Booked List**) works like the Converted Order List. It lists orders whose delivery has been booked, with **Booked Despatch Date** and **Booked Delivery Date**. Searching with **Newly converted orders** lists the live orders whose booking has not been sent. **Orders From:** lists orders from a date. Only orders with both booked dates can be ticked. **Create Feed** creates the booking confirmations.

Channel	Order Number	Document No	Order Date	Customer	Booked Despatch...	Booked Delivery...
☐ Virtual Stock	VS-30001	0000005130	28/09/2026	Harriet Example		
☐ Virtual Stock	VS-30002	0000005131	29/09/2026	George Sample		
☐ Virtual Stock	VS-30003	0000005132	01/10/2026	Ella Example	03/10/2026	05/10/2026
☐ Virtual Stock	WK-0012345	0000005136	01/10/2026	Alex Example	03/10/2026	05/10/2026
☐ Virtual Stock	WK-0012346	0000005137	01/10/2026	Priya Demo	04/10/2026	06/10/2026
☐ Virtual Stock	VS-30004	0000005133	02/10/2026	Max Sample	04/10/2026	

Delivery Booked List

Confirmations that an order has been delivered are sent from the **Delivered Order List**. The window is shown in section 13.6.

6.13 Cancellations

Some channels send cancellation requests for orders you have already converted (for example Wayfair and Very – Channel Reference, chapters 25 and 24; each channel's chapter says whether it does and how often requests are checked). Channels decides each request against the Sage order:

Situation	Result
Nothing on the order (or on the lines asked for) has been despatched	The request is accepted: the whole order, the lines, or the quantities asked for are cancelled in Sage, and the order is cancelled if no lines are left. The channel is told the cancellation is accepted.

Situation	Result
The whole order is asked for and anything has been despatched	Rejected: "Sales order is at least partially despatched".
Lines are asked for and one of them has been despatched	Rejected: "At least one item has been despatched".
The order has already been cancelled in Sage	Rejected: "Sales order is complete".

Other add-ons you use (for example a warehouse integration) can also refuse a cancellation when the goods are already being picked. The reason is sent back to the channel.

If you cancel a converted order yourself in Sage 200, tell the channel yourself where it needs to know. Orders already sent to a third-party warehouse are handled as described in the Channel Reference, chapter 30.

6.14 Despatch and shipping

Once the order is despatched in Sage 200, the channel's shipment list and automation send the despatch, carrier and tracking details back to the channel, and – where the channel needs them – invoices and credit notes. See section 13.

7. Customers

A **Customers** channel exports your Sage 200 customer accounts – names, addresses, contacts, account details and any analysis codes you choose – as a CSV, XML or JSON file, and sends it by email, to an FTP site or to a web address. It is used to keep a web store, a B2B portal, a CRM system or a warehouse up to date with your customers.

Setting up a Customers channel and designing the file are described step by step in the separate **Customers Export – Operator Guide**. This chapter is a summary.

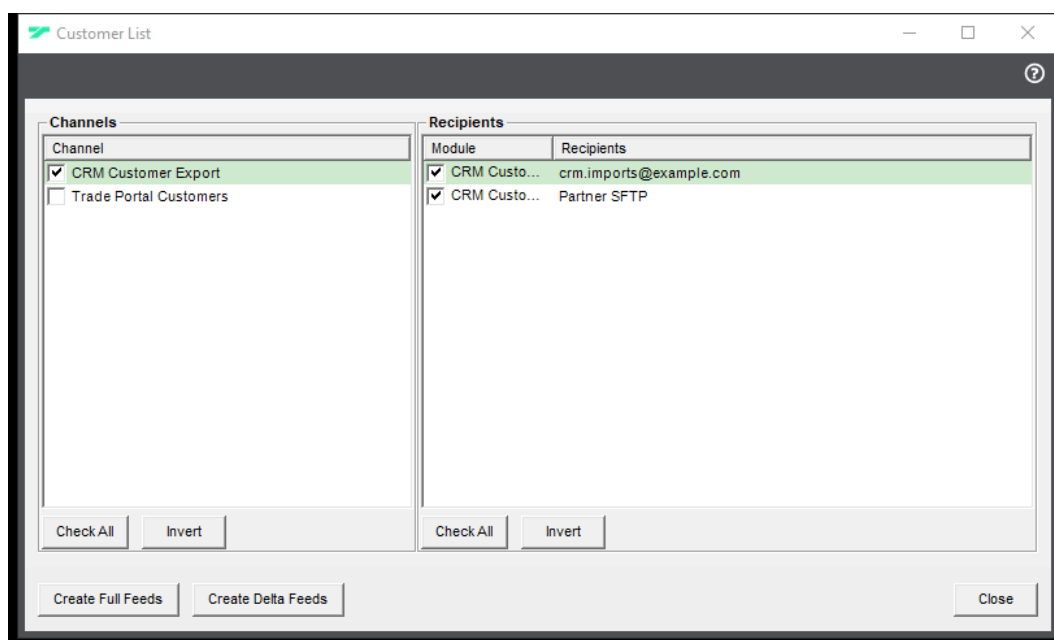
7.1 Setting up a Customers channel

Add the channel from the Channel List with the connection wizard (section 4), choosing **Customers**. The pages are:

Page or button	What it does
Name: and Enabled	The channel's name, and whether it is in use.
Filters	Which customers are exported: Active and/or Inactive accounts (under Customer Status), and optionally only customers with chosen Analysis Codes values.
File Options	The file type (CSV, XML or JSON) and its layout, as for any other file channel (section 4.9).
Defaults only	Exports one row per customer, using its preferred default contact and standard price band. Without it, a customer with several contacts can appear on several rows.
Distribution page	Who receives the file: Add Email , Add FTP , Add End Point (section 5.10), Edit and Remove . Each recipient gets its own file.
Feed design	Which customer fields make up the file and in what order, built from a template file. See the Customers Export – Operator Guide, sections 4 and 7.

7.2 The Customer List

Use **Channels** ► **Text & Excel Files** ► **Customer List** to create customer files on demand.



Customer List

Field or button	What it does
Channels	Your Customers channels. None is ticked when the screen opens (some sites have many); tick the ones you want, or use Check All and Invert .
Recipients	The recipients of the ticked channels (Module , Recipients), all ticked. Untick any recipient that should not get a file this time. Check All and Invert work on this list.
Create Full Feeds	Creates a file of every customer that passes the channel's filters, for each ticked recipient.
Create Delta Feeds	Creates a file of only the customers whose exported details have changed since they were last sent. A channel with nothing changed creates no file.
Close	Closes the list.

When it has finished, Channels reports “Successfully created customer data export feeds for 2 modules” (or “...delta customer data export feeds... (a module with nothing changed creates no feed)”). The files are export feeds: they are sent by the channel's **Upload customer feeds** job or from **Channels ► Export Feeds** (section 14).

7.3 Automating customer feeds

Add the channel's automations to a job bag (section 15.4):

Automation	What it does
Create customer feeds	Creates a full file for every recipient.
Create delta customer feeds	Creates a file of the customers changed since the last send.
Upload customer feeds	Sends the files that are waiting to their recipients.

A common pattern is a full feed once a night and delta feeds through the day, each followed by an upload.

7.4 Customers created from orders

Customer accounts can also be found or created automatically when orders are converted. That is set up on **Settings ► Customers** (section 3.8) or on a channel's **Customers** tab of Channel Options (section 5.1); section 6.6 (Customers) describes what happens.

8. Web hooks and the Channels API

This chapter covers two ways for other systems to work with Sage 200 through Channels. Web hooks let Channels talk to other systems as things happen, without setting up a channel:

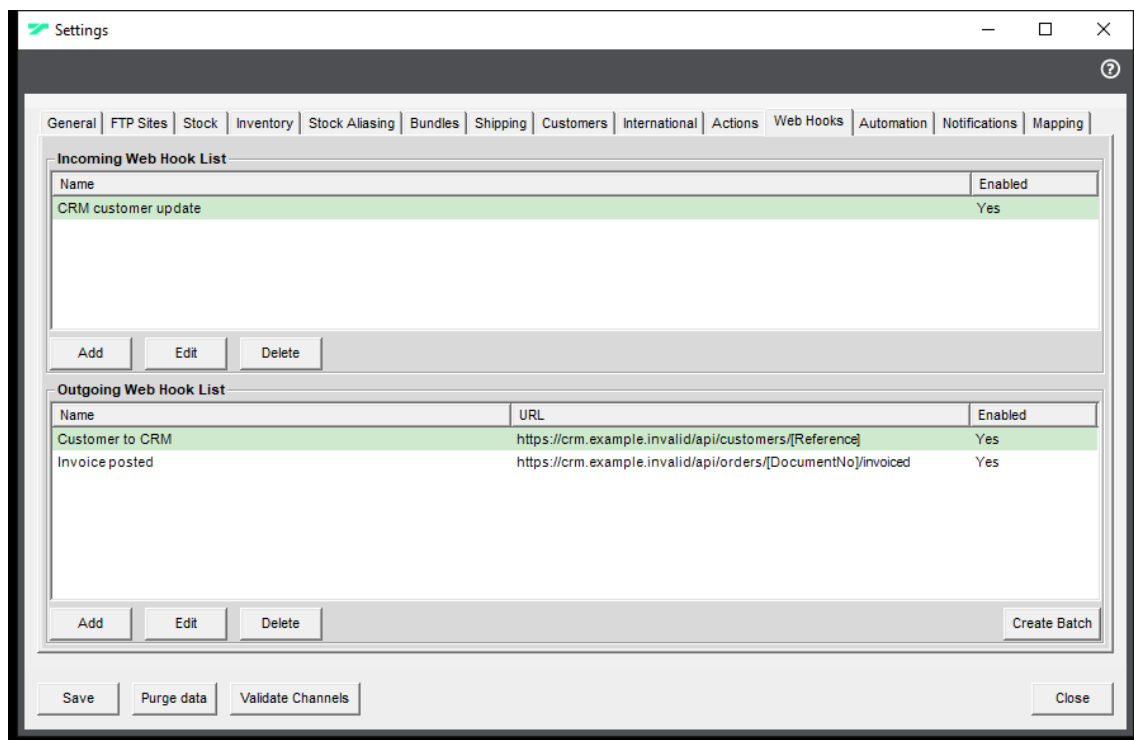
- an **outgoing web hook** sends a small JSON message to another system when something happens in Sage 200 – a customer account is saved, or a sales invoice is posted;
- an **incoming web hook** receives a JSON message from another system and updates a record in Sage 200 – a customer, supplier, stock item, sales order or purchase order.

The **Channels API** lets another system post sales orders straight into Channels (section 8.7).

Web hooks and the Channels API need the Channels web API to be installed and reachable by the other system. Your Tilted consultant sets this up and gives the other system the addresses to use.

8.1 The Web Hooks tab

Web hooks are set up on the **Web Hooks** tab of **Channels ► Settings** (section 3.11).

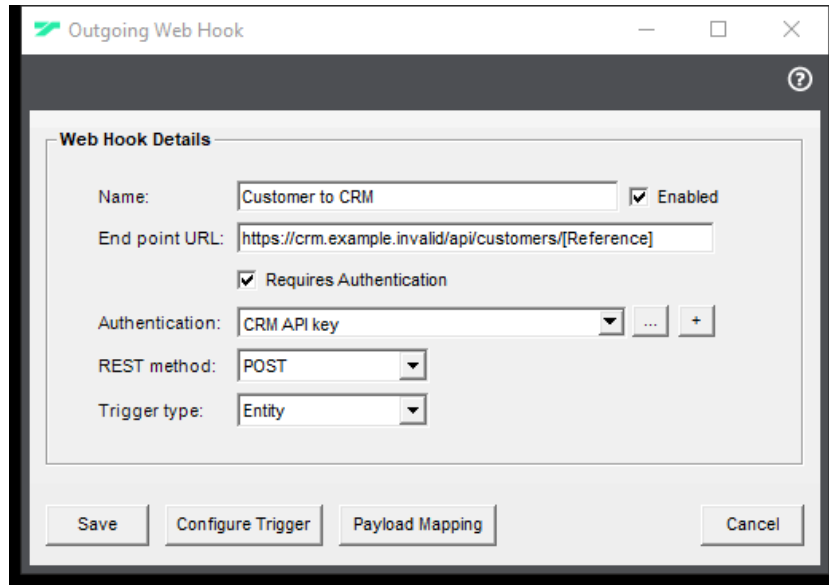


Settings – Web Hooks tab

Field or button	What it does
Incoming Web Hook List	Your incoming web hooks (Name , Enabled).
Outgoing Web Hook List	Your outgoing web hooks (Name , URL , Enabled).
Add	Creates a web hook in that list and opens it.
Edit	Opens the highlighted web hook (or double-click it).
Delete	Deletes the highlighted web hook after “Are you sure you want to delete the selected outgoing web hook?” (or “...incoming web hook?”).
Create Batch	Sends the highlighted outgoing web hook for a whole group of customers at once (section 8.4).

Web hooks are saved by their own windows; you do not need to click **Save** on the Settings screen afterwards.

8.2 Outgoing web hooks

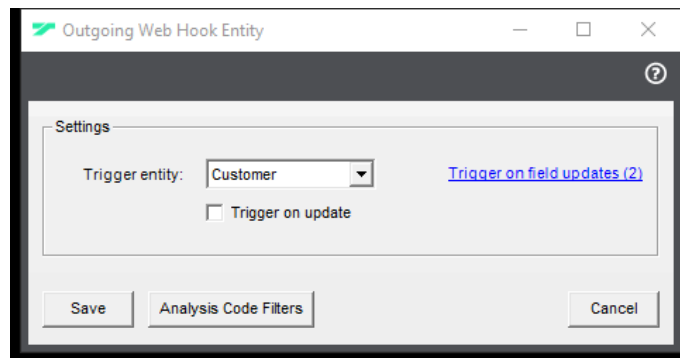


Outgoing Web Hook

Field or button	What it does
Name:	The web hook's name. It is also the name its messages are filed under in Export Feeds (section 14).
Enabled	Untick to stop the web hook without deleting it.
End point URL:	The address the message is sent to, for example https://crm.example.com/api/customers/[Reference] . A field name in square brackets is replaced with that field's value from the record, so each message goes to the right record on the other system.
REST method:	POST , PUT or PATCH , as the other system expects.
Requires Authentication and Authentication:	Tick if the other system needs a login, then pick the authentication to use. + creates a new one and ... edits the selected one (the End Point Authentication window, section 5.10).
Trigger type:	Entity – send when a record is saved; Message – send when Sage 200 does something (such as posting an invoice).
Configure Trigger	Sets up the trigger chosen above (see below).
Payload Mapping	Designs the JSON message (section 8.6).
Save / Cancel	Saves or abandons the web hook.

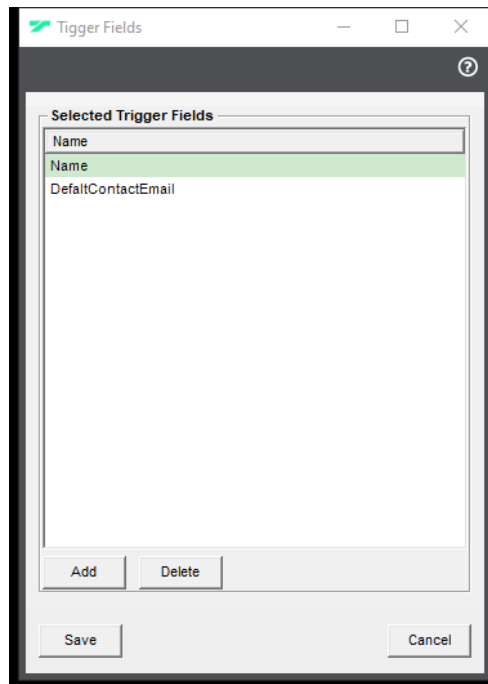
Entity trigger

With **Trigger type:** set to **Entity**, **Configure Trigger** opens the trigger settings.



Outgoing Web Hook Entity

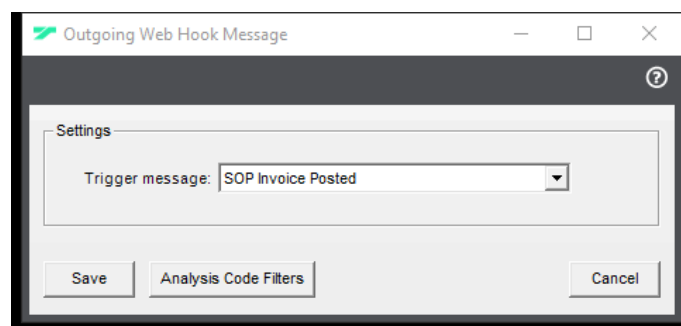
- **Trigger entity:** – the record that triggers the message – for example **Customer**, so that the message is sent each time a customer account is saved in Sage 200.
- **Trigger on update** – send every time the record is saved.
- **Trigger on field updates** (when **Trigger on update** is not ticked) – send only when one of the chosen fields changes. The link shows how many fields are chosen; click it to open **Selected Trigger Fields**, then **Add** to pick fields (“You need to select some fields” if you pick none) and **Delete** to remove one.
- **Analysis Code Filters** – send only for records with the analysis code values you choose.



Selected Trigger Fields

Message trigger

With **Trigger type:** set to **Message**, **Configure Trigger** lets you pick the **Trigger message:** – for example **SOP Invoice Posted**, which sends the sales order each time one of its invoices is posted. **Analysis Code Filters** limits it to orders with chosen analysis code values.



Outgoing Web Hook Message

8.3 What happens when an outgoing web hook fires

Channels builds the JSON message from the payload mapping, keeps it as an export feed (section 14) and sends it straight away in the background, so that saving or posting in Sage is not slowed down. If the other system refuses it, the feed is marked as processed with errors and the other system's reply is kept as the error; you can see and resend it from **Export Feeds**.

8.4 Sending a batch

Use **Create Batch** to send an outgoing customer web hook for many customers at once – for example when the other system is first connected.

Name	Value
Acct Mgr	
Cus Type	
Discount Band	
How did you hear about us?	
Region	

Value
☐ Alan Ward
☒ Jim Branning
☐ Joyce Peters
☐ Peter Bellamy
☐ Phil Simmons
☐ Susan Maye
☐ Winston Pusey

Outgoing Batch

1. Highlight the outgoing web hook on the Web Hooks tab and click **Create Batch**.
2. In **Analysis Codes**, choose which customers to include: type a **Value** for an analysis code, or highlight a code and tick the wanted entries under **Values**. Leave everything empty to include every customer.
3. Click **Save**. Channels tells you how many accounts match (“Do you want to create outgoing web hook feeds for the 250 accounts discovered?”), or “Failed to locate any customer accounts that fit the specified filters”.
4. Click **Yes**. One message is created and sent for each customer, and you are told “Outgoing webhook feeds created”.

Important: A batch sends a message for every customer it finds straight away. Check the filter and the count before you click **Yes**.

8.5 Incoming web hooks

Each incoming web hook describes one kind of message another system sends, and which Sage record it updates.

The screenshot shows a window titled "Incoming Web Hook". Inside, there's a "Web Hook Details" section. It contains the following fields and controls:

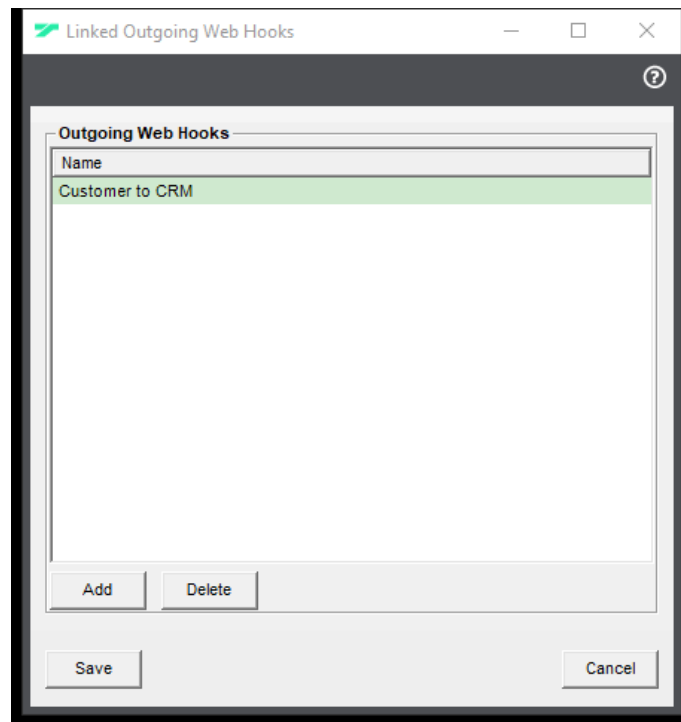
- Name:** A text input field containing "CRM customer update". To its right is a checked checkbox labeled "Enabled".
- Update entity:** A dropdown menu currently showing "Customer".
- Use payload field value to validate:** A checked checkbox.
- Payload field:** A dropdown menu currently showing "event".
- Field value:** A text input field containing "customer.updated".

At the bottom of the dialog, there are four buttons: "Save", "Payload Mapping", "Linked Outgoing Webhooks", and "Cancel".

Incoming Web Hook

Field or button	What it does
Name: and Enabled	The web hook's name, and whether it is in use.
Update entity:	The kind of Sage record the message updates: Customer , Supplier , Stock Item , Sales Order or Purchase Order .
Use payload field value to validate	When several kinds of message look alike, tick this and choose a Payload field: and the Field value: it must have (for example the field event with the value customer.updated). The list of payload fields is filled once the payload mapping has a template.
Payload Mapping	Loads an example of the message and maps its fields to the Sage record (section 8.6). At least one key field – the one that identifies the record, such as the customer's account reference – must be mapped.
Linked Outgoing Webhooks	Outgoing web hooks to send straight after this one has updated a record (for example to confirm the update back to the other system). Use Add to pick from the outgoing web hooks for the same kind of record ("You need to select some web hooks" if you pick none) and Delete to remove one.
Save / Cancel	Saves or abandons the web hook.

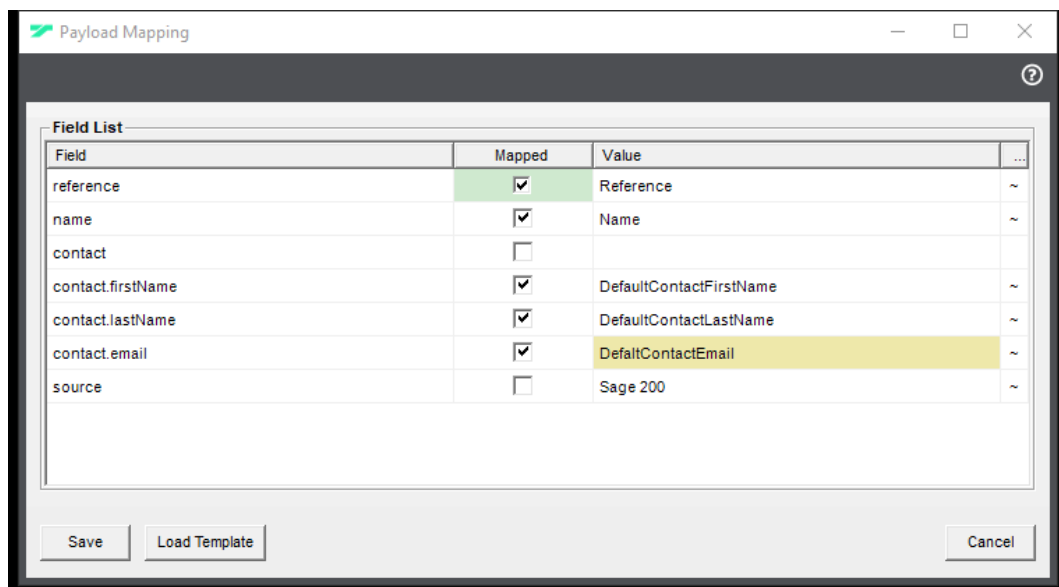
When a message arrives, Channels keeps a copy of it, then checks the enabled incoming web hooks in turn. The first one whose template has the same shape as the message (and whose payload field value matches, if used) finds the Sage record by its key field, updates the mapped fields and then sends any linked outgoing web hooks. Messages that match no web hook are kept but change nothing.



Linked Outgoing Web Hooks

8.6 Payload mapping

Payload Mapping describes the JSON message field by field, for both outgoing and incoming web hooks.



Payload Mapping

1. Click **Load Template** and choose an example of the message as a JSON file (from the other system's documentation). Channels lists every field in it under **Field List**. Loading a new template keeps the mappings of fields that are still there.
2. For each field you want to fill (outgoing) or read (incoming), tick **Mapped** and choose the Sage field in **Value**. For an outgoing web hook you can instead leave **Mapped** unticked and type a fixed value.
3. To calculate a value, click the ~ cell on the row and write a script (section 5.9). Fields with a script are shown pale yellow.

- Click **Save**. For an incoming web hook you are told “You need to map at least one of the key fields for the selected entity (...)” if no key field is mapped.

8.7 The Channels API

The Channels API lets your own web site, a portal or any other system post sales orders into Channels. The orders then go through exactly the same conversion as any other channel (section 6).

Setting up an API channel

Add an **API** channel from the Channel List with the connection wizard (section 4). The connection page has:

API channel – connection page

Field	What it does
Name:	The channel's name. The other system uses this name when it posts orders, so agree it before you start (“You need to provide a name” if left empty).
Enabled	Orders are only accepted while the channel is enabled.
Process Immediately	Convert each order into Sage 200 as soon as it is received and tell the other system the Sage order number. Leave unticked to keep orders on the API Order List until you, or a job bag, convert them.
Validate online	Check each order as it is received and refuse it at once if it has no order identifier, customer account number, customer document number, line identifier or item code, or a line with a quantity of zero or less.

The channel comes with default mappings for the API's order fields (customer account, customer document number, delivery address, tax inclusive, payment value, shipping method, item code, quantity, unit price and discount percent). Extra information the other system sends is kept as attributes on the order.

What the other system is told

Reply	Meaning
“Order queued for processing ZID:12345”	The order has been stored and is waiting on the API Order List.
“Order succesfully created as '0000123456”	With Process Immediately : the Sage order was created; the reply carries its number.
The conversion error	With Process Immediately : the order could not be converted. It stays on the API Order List with the reason, as in section 6.10.
“Order already queued for processing”	An order with the same identifier is already waiting.
“Channel Web Orders does not exist” / “... is not enabled” / “... is not an API channel”	The channel name in the request is wrong, or the channel is switched off.

Reply	Meaning
"Order identifier is mandatory" (and the other "... is mandatory" replies)	With Validate online : a required value is missing.

The API Order List

Channels ► API ► Order List shows the API orders waiting to be converted. It is the order list described in section 6.2, without search options: **Find** simply refreshes the list, because orders arrive from the other system rather than being downloaded. Convert, edit and remove orders exactly as in section 6. To convert API orders automatically, add the channel's **Process orders** job to a job bag (section 15.4). The picture in section 6.2 shows the API Order List.

9. Stock aliases, bundles and virtual warehouses

This chapter covers three ways of matching what a channel sells to what you hold in Sage 200: **stock item aliases** (the channel or customer uses a different code for a Sage item), **bundles** (one code on the channel is made up of several Sage items) and **warehouses** (which Sage warehouses, and which third-party warehouses, count towards the stock you report to each channel).

All of these are set up from **Channels ► Settings** or from a channel's **Channel Options** (open the channel from **Channels ► Channel List** and click **Options** on the **Customisation** page – section 5.1). None of them contacts a channel when you open or save it.

9.1 Stock item aliases

An alias is an alternative code for a Sage stock item – for example the SKU a marketplace or a trade customer uses on its orders. Aliases are kept in **alias groups**. Each group is linked to the customers and/or channels it applies to.

Choosing where aliases come from

On **Settings ► Stock** (section 3.3), the **Aliasing** group decides which alias list Channels uses when it reads an order line:

Field	What it does
Use Channels	Uses the alias groups described in this section. This is the usual choice.
Use Tilted Customer Stock Items	Uses the customer stock item codes held by the Tilted Sage 200 add-on. The order must have a customer account.
Use Eureka Customer Stock Items	Uses the customer stock item codes held by the Eureka add-on. The order must have a customer account.

How an order line code is matched

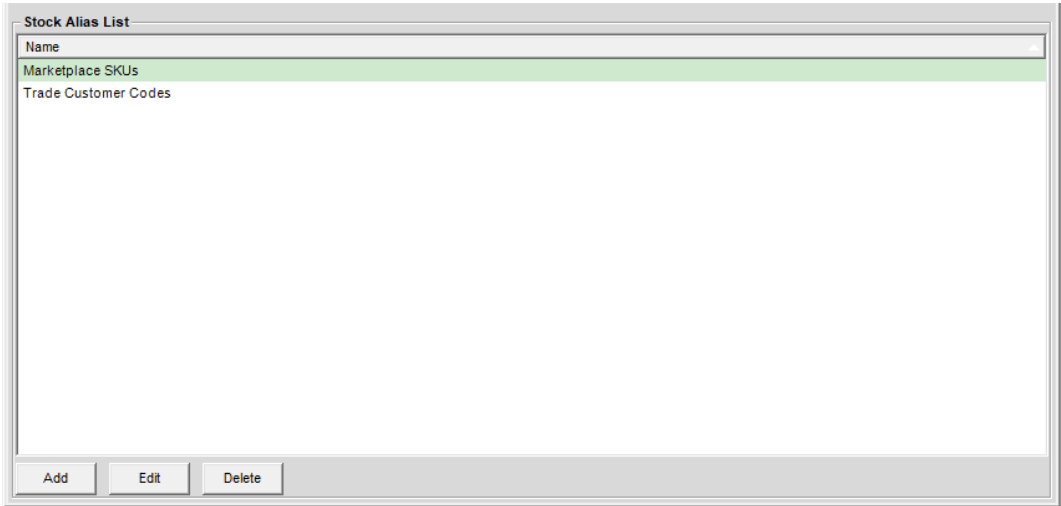
1. Channels first looks for an active Sage stock item (allowed on sales orders and held in one of the warehouses ticked on **Settings ► Inventory**) whose **Code** or **Barcode** equals the code on the order line.
2. If none is found, it looks in the alias list chosen above. With **Use Channels**, it looks in the alias groups linked to the order's customer and, if the customer is not in any group, in the alias groups linked to the channel. The first alias whose **Alias Code** matches is used.
3. If a group has **Alias overrides actual where code is also a standard stock item** ticked, its aliases are checked even when the code is also a real Sage stock code, and the alias wins.

The alias's **Unit** is used as the sales unit on the Sage order line when the channel does not supply one. For channels linked to an alias group, the alias codes are also used when Channels reports stock to that channel and in the files it sends.

Link every alias group to the customers or channels it is for.

The Stock Aliasing tab

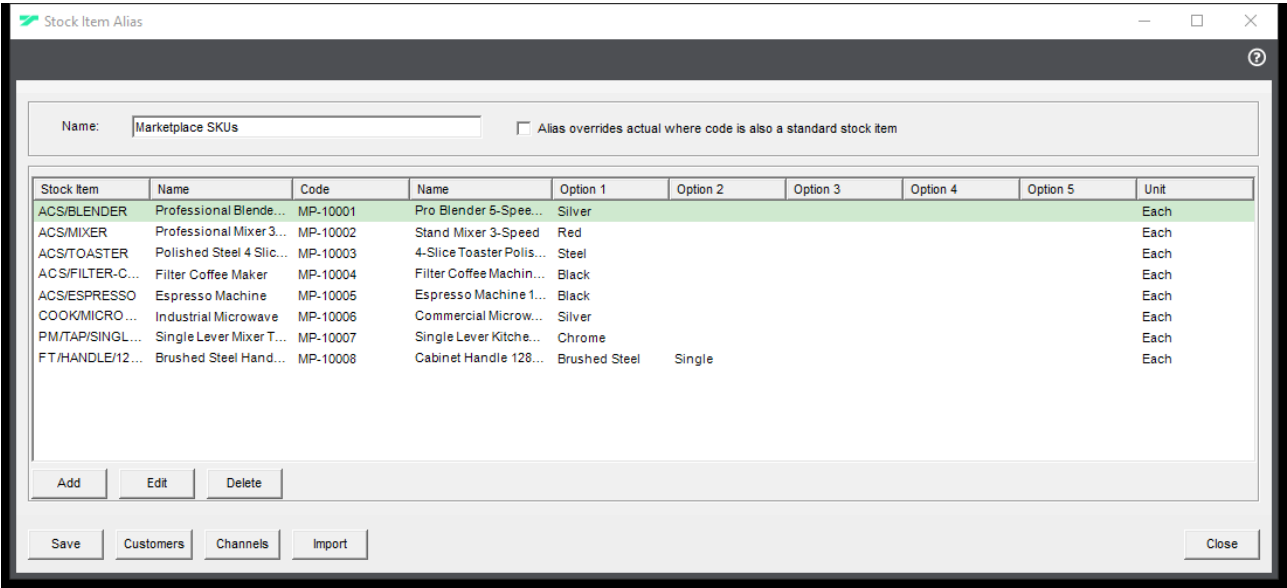
Settings ▶ Stock Aliasing shows the **Stock Alias List** – one row per alias group.



Settings – Stock Aliasing tab

Button	What it does
Add	Creates a new alias group and opens the Stock Item Alias window.
Edit (or double-click)	Opens the selected group.
Delete	Deletes the selected group with all its aliases and its customer and channel links.

Stock Item Alias window (an alias group)



Stock Item Alias – an alias group and its aliases

Field or button	What it does
Name:	The name of the group, for example Marketplace SKUs .
Alias overrides actual where code is also a standard stock item	Tick when the channel's codes can clash with your own stock codes and the alias must win.

Field or button	What it does
Alias list	One row per alias: the Sage Stock Item and its Name , the alias Code and Name , Option 1 to Option 5 and Unit .
Import	Imports aliases from a CSV file (see below).
Add / Edit	Opens the Stock Item Alias Item window for a new or the selected alias.
Delete	Removes the selected alias.
Customers	Opens the list of customers this group applies to.
Channels	Opens the list of channels this group applies to.
Save	Saves the group and closes the window.
Close	Closes the window.

Stock Item Alias Item window

Stock Item Alias Item

Field	What it does
Stock Item:	The Sage stock item. Required – “You need to select a stock item”.
Alias Code:	The code the channel or customer uses. Required – “You need to enter an alias code”.
Alias Name:	The description the channel or customer uses (optional).
Option 1: to Option 5:	Extra values held with the alias. Some channel exports use them – see the Channel Reference for your channel.
Unit:	The Sage sales unit to use on the order line when the channel does not give one, for example Each .

Click **Save** to store the alias.

Customers and Channels windows

The **Customers** window lists the Sage customer accounts the group applies to: pick a **Customer:** and click **Add**, select a row and click **Delete** to remove it, then click **Save**. The **Channels** window works the same way with a **Channel:** list. Adding the same customer or channel twice gives “‘<name>’ has already been added.”

Customers

Customer:

To make this group available to all customers then leave the list empty

Reference	Name
KIT001	Kitchen Refit Specialists Ltd
COU001	Country Kitchens

Alias group – Customers

Channels

Channel:

To make this group available to all customers then leave the list empty

Channel
Amazon UK FBA
eBay UK

Alias group – Channels

Importing aliases

Click **Import** in the alias group. Channels explains the format, then asks for a CSV file. Use one line per Sage stock item, no header row, with the columns in this order:

Column	Contents
1	Sage stock code (required)
2	Alias code (required)
3	Alias name
4–8	Option 1 to Option 5
9	Unit

For example: **SOAP-LAV,MP-12345,Lavender Soap,Lilac,,,,,Each**. Do not include the Sage stock item name.

The import updates the alias for each Sage stock item in the file, so each stock item ends up with one alias in the group. If you need several alias codes for the same stock item, add the extra ones by hand with **Add**. When the import finishes Channels shows how many new, existing and missing items it found and how

many duplicates it removed. Stock codes that are not in Sage are listed in a text file that opens automatically.

Aliases on the stock item record

The **Channels** tab of the Sage stock item record lists the item's aliases, and lets you open or delete them (section 16.8).

9.2 Bundles

A bundle is a code you sell on a channel that is made up of several Sage stock items – for example a gift set. When an order line uses a bundle code, Channels replaces it with one line per component when it creates the Sage order. Bundles are kept in **bundle groups**.

How a bundle is used on an order

- The order line's item code must equal the **Code** of an enabled bundle in an enabled group. A bundle code is checked before ordinary stock codes.
- Groups linked to the order's channel are checked first, then groups with no channels listed.
- Each component line gets the bundle quantity × the component **Quantity**.
- The price comes from the channel order line (the bundle's **Price** is used only when the channel gives none). It is shared out by each component's **% of Bundle Price**, or each component gets its own **Component Price** when **Fixed component prices** is ticked. Any discount on the bundle line is shared across the components in the same way.
- If **Fixed tax code** is ticked, every component line gets that tax code.
- The component lines are added after the order's other lines. Channels remembers which lines came from which bundle, so shipment and invoice messages to the channel report the bundle as one line where the channel expects that.

Bundles in stock feeds

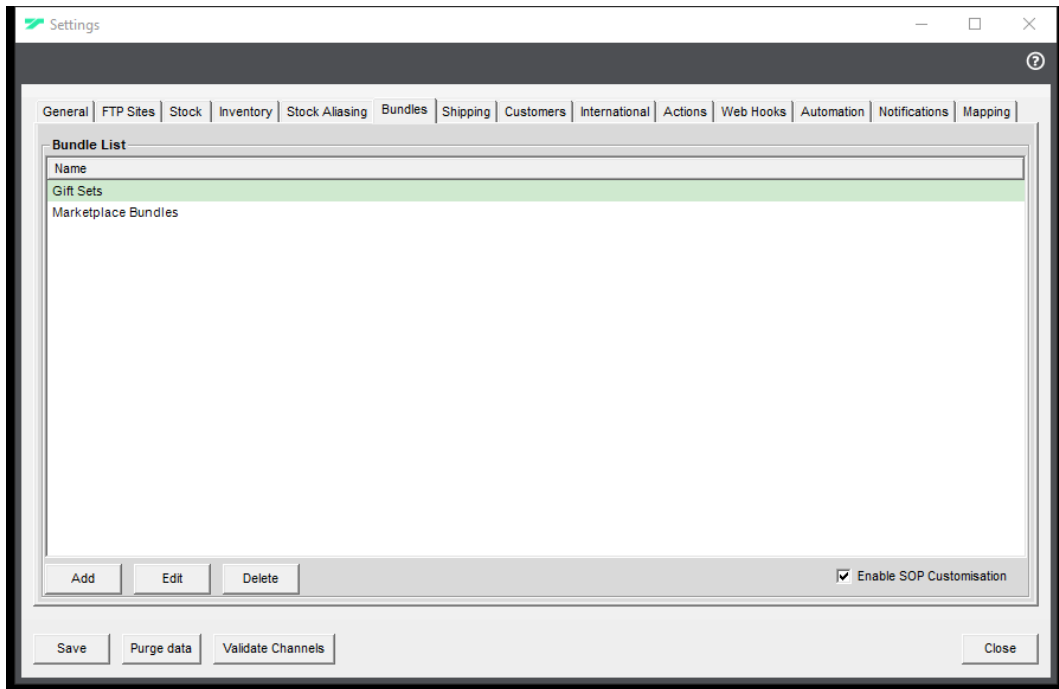
When Channels sends stock levels to a channel, the stock of a bundle is the number of complete bundles that can be made from the free stock of its components, less the channel's **Additional inventory buffer**:. A bundle's stock is included for every channel its group is used for. For most channels the bundle code must also be one of the channel's inventory items; see section 11.1 (Kits and bundles).

A group with no channels listed is used for every channel.

The Bundles tab

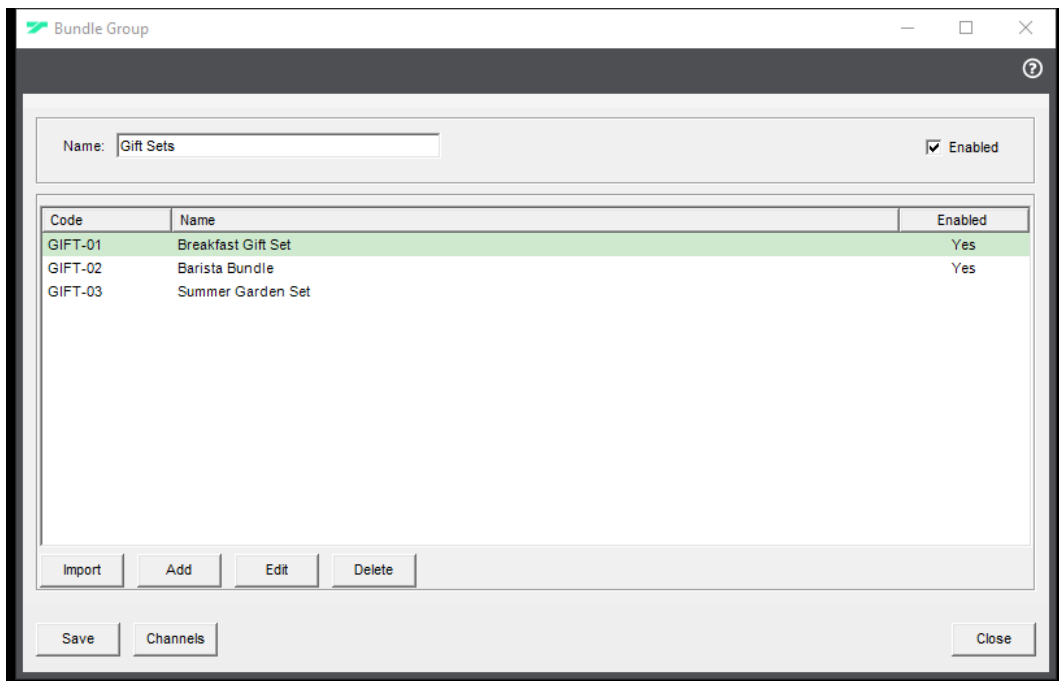
Settings ► Bundles shows the **Bundle List** – one row per bundle group – with **Add**, **Edit** and **Delete**.

Deleting a group asks “Are you sure you want to delete this group?” and removes its bundles and channel links. Tick **Enable SOP Customisation** (saved with Settings) to add an **Add bundle** button to the Sage sales order screens (section 9.3).



Settings – Bundles tab

Bundle Group window



Bundle Group

Field or button	What it does
Name:	Name of the group. Required – “You need to supply a name”.
Enabled	Untick to stop using every bundle in the group.
Bundle list	Code , Name and Enabled of each bundle in the group.
Import	Imports bundles from a CSV file (see below).
Add / Edit	Opens the Bundle window.
Delete	Deletes the selected bundle after “Are you sure you want to delete this bundle?”.
Channels	Opens the list of channels the group is linked to.
Save	Saves the group and closes the window.
Close	Closes the window.

Bundle window

The Bundle window displays the following information:

- Code:** GIFT-01
- Name:** Breakfast Gift Set
- Price:** 89.99000
- ☐ Fixed component prices
- ☐ Fixed tax code 0
- ☒ Enabled

Stock Item	Name	Quantity	% of Bundle Pri...	Option 1	Option 2
ACS/TOASTER	Polished Steel 4 Slice Toaster	1.00000	40.00000		
ACS/FILTER-C...	Filter Coffee Maker	1.00000	35.00000		
PROMO/MER/L...	Latte Cup	2.00000	25.00000		
Totals		4.00000	100.00000		

Buttons: Add, Edit, Delete, Save, Cancel

Bundle – components and price split

Field or button	What it does
Code:	The code the channel sends on the order line, for example GIFT-01 . Use a code that is unique across your bundles.
Name:	Description, also used as the bundle's name in stock feeds.
Price:	Bundle price, used when the channel order line has no price and as the default in Add bundle .
Fixed component prices	Untick to share the bundle price by percentage (% of Bundle Price column); tick to give each component its own price (Component Price column).
Fixed tax code	Tick and choose a tax code to use it on every component line. "You need to select a tax code" if none is chosen.
Enabled	Untick to stop using this bundle.
Component grid	Stock Item, Name, Quantity, % of Bundle Price or Component Price, Option 1, Option 2 , with a Totals row.
Add / Edit	Opens the Bundle Item window for a component.
Delete	Removes the selected component.
Save	Checks that every component has a positive quantity ("Please ensure a positive quantity is applied to all lines.") and, with percentage pricing, that the percentages total 100 ("The percentage does not total to 100, do you want to continue?"), then saves.
Cancel	Closes without saving. For a new bundle, the bundle and its components are discarded.

Bundle Item window

The Bundle Item window displays the following information:

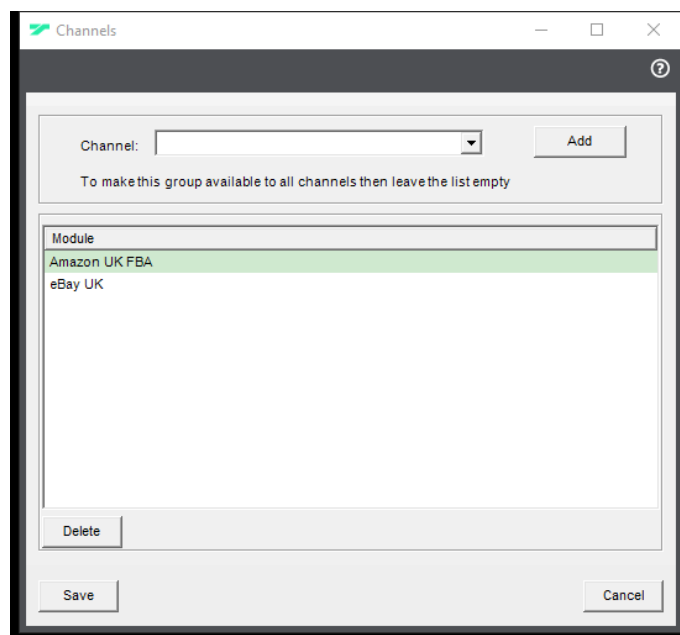
- Stock Item:** ACS/TOASTER (dropdown menu)
- Name:** Polished Steel 4 Slice Toaster
- Quantity:** 1.00000
- % of Bundle Price:** 40.00000
- Option 1 Text:** (empty text box)
- Option 2 Text:** (empty text box)

Buttons: Save, Cancel

Bundle Item

Choose the **Stock Item:** (“You need to select a stock item”), the **Quantity:** of it in one bundle (“You need to enter a quantity”), and its share of the price – **% of Bundle Price** or **Fixed Price**, depending on the bundle. **Option 1 Text:** and **Option 2 Text:** hold optional extra text. Click **Save**.

Bundle group Channels window

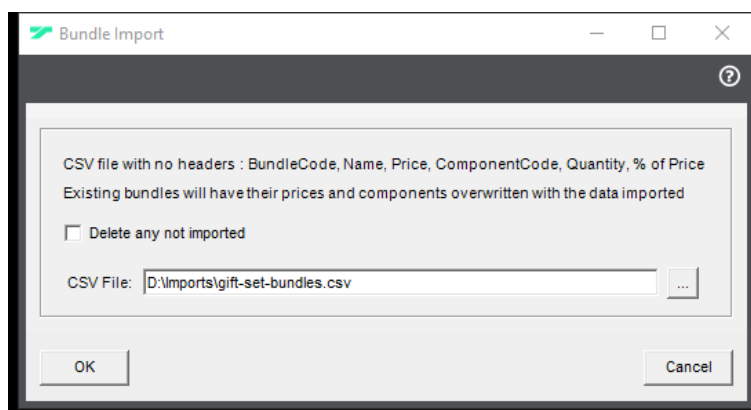


Bundle group – Channels

Pick a **Channel:** and click **Add**; select a row and click **Delete** to remove it; click **Save**. Adding a channel twice gives “‘<name>’ has already been added.”

Importing bundles

Click **Import** in the bundle group. In the **Bundle Import** window, choose the **CSV File:** with ... and click **OK**. Tick **Delete any not imported** to delete every bundle in this group whose code is not in the file.



Bundle Import

The file has no header row and one line per component, with six columns: bundle code, bundle name, bundle price, component stock code, quantity, % of price. Lines with the same bundle code make up one bundle; the first line's name and price are used. Each bundle's percentages must total 100, and every component must be a Sage stock code. For example:

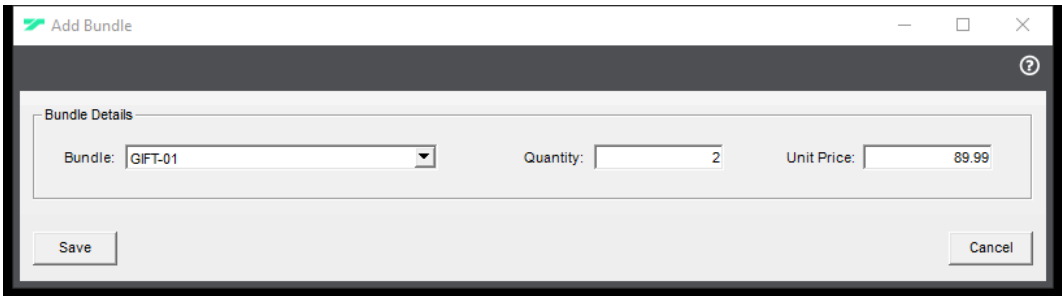
```
GIFT-01,Bath Gift Set,29.99,SOAP-LAV,1,40
GIFT-01,Bath Gift Set,29.99,CANDLE-LAV,1,35
GIFT-01,Bath Gift Set,29.99,TOWEL-WHT,2,25
```

New bundles are imported with percentage pricing and enabled; a bundle that already exists in the group is updated from the file. The file is checked first: if any line is wrong, nothing is imported and the problems are listed in a text file that opens automatically ("Import Failed, see details in text file"). Otherwise Channels reports how many bundles were created, updated and deleted.

9.3 Adding a bundle to a Sage sales order

With **Enable SOP Customisation** ticked on **Settings ► Bundles**, an **Add bundle** button appears with the line buttons on **Enter New Order**, **Amend Order** and the matching quotation and pro forma screens. It adds all the components of a bundle in one go.

1. Enter the order header, including the warehouse – the components are taken from that warehouse ("You need to choose a warehouse first").
2. Click **Add bundle**. In the **Add Bundle** window choose the **Bundle:** (the list shows **Code**, **Name** and **Group**), enter the **Quantity:** of bundles and check the **Unit Price:**, which is filled in with the bundle's price when you choose it.
3. Click **Save**. Channels adds one standard line for each component.



Add Bundle (Sage sales order entry)

On each component line	Value
Quantity	Number of bundles × the component's quantity in the bundle.
Unit price	The component's % of Bundle Price share of the Unit Price ;, divided by its quantity – or, for a bundle with Fixed component prices , the component's own price.
Tax code	The bundle's fixed tax code when it has one, otherwise the item's usual tax code.

The component lines are added to the order as soon as you click **Save** in the **Add Bundle** window. To take a bundle off again, delete its lines from the order.

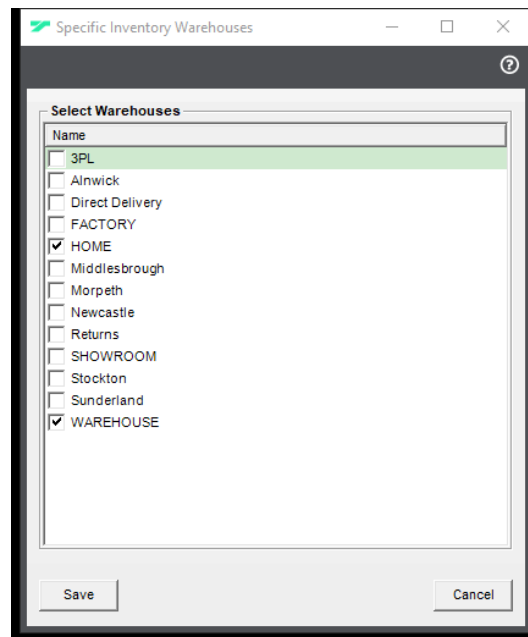
The **Channels** tab of the Sage stock item record also lists the bundles that contain the item (section 16.8).

9.4 Warehouses used for stock, and virtual warehouses

Every channel's stock is counted across the warehouses ticked on **Settings ► Inventory** (section 11.4). A channel can narrow that to some of those warehouses, or add the stock held by your Third Party Logistics channels – outsourced warehouses and drop-ship suppliers – which Channels calls virtual warehouses. Section 11.1 explains how the figures combine; this section describes the two windows.

Specific Inventory Warehouses

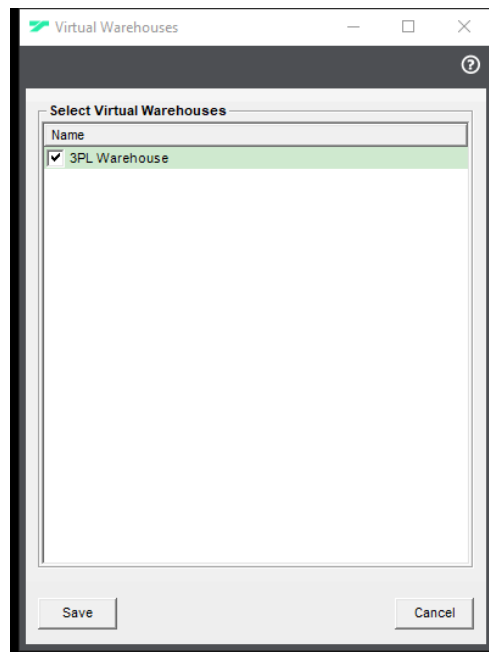
Tick **Restrict to specific warehouses** on the channel's **Inventory** tab of Channel Options, then click the **Warehouses** link. In **Specific Inventory Warehouses**, tick the warehouses in **Select Warehouses** and click **Save**. The channel's stock feed then adds up free stock only in those warehouses. The Inventory channel's connection page has the same choice (**Specific Warehouses** and the **Warehouses** link).



Specific Inventory Warehouses

Virtual warehouses

A virtual warehouse is the stock held by a Third Party Logistics channel, as reported in that 3PL's stock files. Tick **Include virtual warehouses** on the channel's **Inventory** tab of Channel Options, click the **Virtual Warehouses** link, tick the 3PL channels under **Select Virtual Warehouses** and click **Save**. The Inventory channel's connection page has the same choice.



Virtual Warehouses – choosing the 3PL channels

For each chosen 3PL, the free stock it reports, less any of your orders it still has to ship, is added to the item's free stock for this channel. An item held only in a virtual warehouse can be offered too. The stock item record's **Channels** tab shows the **Virtual warehouse total free stock:** (section 16.8), and the **Virtual Warehouses** button on **Settings ► Inventory** lists the stock each 3PL has reported (section 11.4).

Moving order lines to another warehouse when an order is converted (warehouse switching) is a different subject – see section 6.6.

10. Actions and customer groups

Actions are your own business rules, applied automatically while Channels turns a stored order (a downloaded order waiting on the order list) into a Sage sales order. Each action has **criteria** (when it applies) and one or more **actions** (what it does) – for example “if the order is over £500, put it on hold and add a comment”, or “if the shipping service is Next Day, add the next-day carriage charge”.

Actions are set up on the **Actions** tab of **Channels ► Settings**. They do not contact any channel. Customer groups let you restrict actions to particular customers. This chapter explains when actions run, how to set one up, what criteria and actions are available, and how to limit an action to channels and customer groups.

10.1 When actions run

Each action has an **Execution** point:

Execution	When it runs	What it can work with
Before Processing	After the stored order has been mapped, before the Sage order is created. Runs again when an order change (for example an EDI change message) is applied.	The mapped order and line values. Use it to change mapped values, set VAT codes, switch the order to another channel or send an email.
Before Committing	After the Sage order and its lines have been created, before the order is given its document number and saved. New orders only.	The Sage sales order and its lines, plus the mapped values.
After Processing	After the Sage order (or return) has been saved with its document number.	Everything, including the document number. Complete Order / Return is only available here.

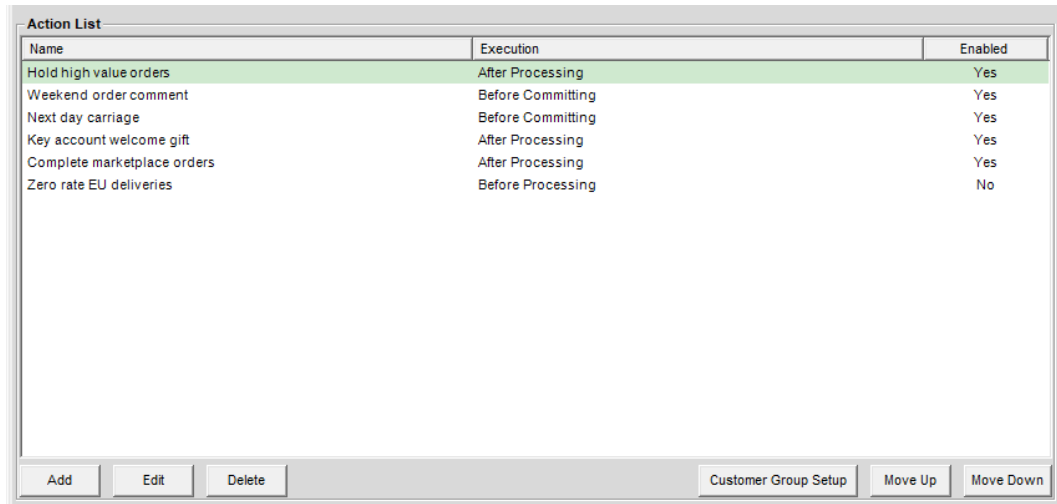
At each point, the actions run one at a time in the order shown in the **Action List**. Use **Move Up** and **Move Down** to change the order.

An action runs for an order only when:

- the action is **Enabled**;
- the order's channel is ticked in the action's **Channels**;
- the action has at least one criterion and its criteria are met; and
- the customer group rules allow it (section 10.6).

If an action cannot be applied – for example the warehouse it names no longer exists – the problem is written to the Channels log and the order is still converted.

10.2 The Actions tab



Name	Execution	Enabled
Hold high value orders	After Processing	Yes
Weekend order comment	Before Committing	Yes
Next day carriage	Before Committing	Yes
Key account welcome gift	After Processing	Yes
Complete marketplace orders	After Processing	Yes
Zero rate EU deliveries	Before Processing	No

Buttons: Add, Edit, Delete, Customer Group Setup, Move Up, Move Down

Settings – Actions tab

The **Action List** shows each action's **Name**, **Execution** point, whether it is **Enabled** and its **Notes**, in the order they run.

Button	What it does
Add	Creates a new action (Execution Before Processing , placed at the end of the list) and opens Action Configuration .
Edit (or double-click)	Opens the selected action.
Delete	Deletes the selected action after “Are you sure you want to delete the selected action?”.
Customer Group Setup	Opens the Customer Groups list (section 10.6).
Move Up / Move Down	Moves the selected action one place earlier or later. Saved straight away.

Actions are saved by their own windows. The Settings **Save** button does not affect them.

10.3 Action Configuration

Details

Name: ☒ Enabled

Execution:

Operator:

Criteria

Type	Object	Property	Operator	Value
Basic	Sales Order	TotalGrossValue	Greater than	500
Basic	Mapped Order Field	Delivery Country Code	Is not EU	

Actions

Type	Action	Name	Value
Predefined	Hold Order		
Predefined	Add Comment	Held for value check	{"Q":"","P":"","W":"","CD":"","PL"...

Action Configuration

Details

Field	What it does
Name:	A name for the rule. Required – “You need to provide a name”.
Enabled	Untick to switch the action off without deleting it.
Execution:	When the action runs (section 10.1).
Operator:	And – every criterion must be met. Or – any one criterion is enough.
Notes:	Free text for your own records – what the action is for and why it was set up. Up to 2,000 characters, over several lines. Notes do not affect how the action runs.

Criteria and Actions lists

The **Criteria** list shows each criterion's **Type**, **Object**, **Property**, **Operator** and **Value**. The **Actions** list shows what the action does, with its name and value. Each list has **Add**, **Edit** (or double-click) and **Delete**.

Buttons

Button	What it does
Save	Saves the action with its criteria, actions, channels and customer groups. Channels then reminds you if the action has no criteria (“Note that you haven't added any criteria to this action, you need at least one criteria in order for the action to be carried out”), no channels (“Note that no channels have been assigned this action”) or is not enabled (“Note that this action is not enabled”).
Channels	Opens Action Channels : tick the channels the action applies to.
Customer Groups	Opens Action Customer Groups : tick the groups the action is restricted to.
Cancel	Closes the window.

10.4 Criteria

Click **Add** or **Edit** under **Criteria** to open the **Action Criteria** window.

Action Criteria

Field	What it does
Criteria Type:	Always Basic .
Source Type:	Where the value to test comes from (table below).
Source:	The field. For mapped sources, the Channels mapping field names (for example Delivery Country Code); for Sage sources, the fields of that Sage record.
Operator:	How to compare (table below).
Value:	The value to compare with. Type a mapping field name in square brackets, for example [Customer Account Number] , to compare with that mapped value instead.

Source types

Source Type	Tests
Mapped Order Field	A mapped order value (after your field and value mappings). Available at every execution point.
Mapped Line Field	A mapped value on each order line; the actions then apply to the matching lines.
Sales Order	A field of the Sage sales order.
Sales Order Line, Stock Item, Warehouse Item, Warehouse, Product Group	A field of each Sage order line, or of its stock item, warehouse item, warehouse or product group. The actions apply to the matching lines.
Customer	A field of the Sage customer account.
Delivery Address	A field of the order's delivery address.
Customer Credit	The credit position of the order's customer account: Over Credit Limit , Overdue Terms or Days Over Terms (table below).

Sage sources need the Sage order, so they cannot be used on a **Before Processing** action ("Selected value not allowed for selected execution point").

Customer Credit offers three sources:

Source	Value tested	Example criterion
Over Credit Limit	True when the account has a credit limit and its balance, plus its open sales orders, plus this order , is more than the limit – so an account already over its limit and an order that takes it over both count. False when the account has no credit limit (0) and on a sales return.	Equal to True
Overdue Terms	True when the account has an outstanding invoice that is past its due date.	Equal to True

Source	Value tested	Example criterion
Days Over Terms	How many days the oldest outstanding invoice is past its due date (0 when nothing is overdue). Use it to allow a few days' grace.	Greater than or equal to 7

Use **Customer Credit** on a **Before Committing** action to check the order before it is saved, or on **After Processing**. **True** and **False** are case-sensitive.

Operators

Operator	Meaning
Equal to / Not equal to	Exact match. Numbers are compared as numbers; text is case-sensitive.
Contains / Does not contain / Starts with / Ends with	Text tests (case-sensitive).
Greater than / Less than / Greater than or equal to / Less than or equal to	Compared as numbers when both sides are numbers, otherwise as text.
Is EU / Is not EU	The value is a Sage country code that is (or is not) marked as EU in Sage.
Length greater than / Length less than	The number of characters in the field, compared with the number in Value: .
Is in / Is not in	Value: is a comma-separated list, for example GB, IE .
Day & time	The field is a date and time (for example the order date). Tick the days Mon to Sun , choose After or Before in Time of day: and set the time. For example: Friday, after 15:00.

The screenshot shows the 'Action Criteria' dialog box with the 'Criteria Details' tab active. The 'Criteria Type' is set to 'Basic'. The 'Source Type' is 'Mapped Order Field'. The 'Source' is 'Document Date'. The 'Operator' is 'Day & time'. The 'Day of week' section has 'Fri' selected. The 'Time of day' is set to 'After' and '15:00:00'. There are 'Save' and 'Cancel' buttons at the bottom.

Action Criteria – Day & time

A criterion whose field has no value is not met. Click **Save** to keep the criterion in the action; it is stored when you save the action.

10.5 What an action can do

Click **Add** or **Edit** under **Actions** to open the **Action** window. Choose the **Action**; the fields below it change to suit. **Action Type:** is always **Predefined**.

The screenshot shows a window titled 'Action' with a 'Question Mark' icon in the top right. Inside, there's a section labeled 'Action Details'. It contains two columns of fields. The left column has 'Action Type' (set to 'Predefined') and 'Stock Item' (set to 'PROMO/MER/GIFT SET'). The right column has 'Action' (set to 'Add Stock Item'), 'Quantity' (set to '1'), and 'Price' (set to '0.00'). At the bottom, there are 'Save' and 'Cancel' buttons.

Action – Add Stock Item

Action	Fields	What it does
Channel Switch	Channel:	Moves the stored order to another channel; the order is not created now and waits in the other channel's order list.
Set Order Mapping Field Value / Set Line Mapping Field Value	Mapping Field:, Value:	Sets a mapped order (or line) value before the order is created, for example to fill in a missing value.
Set Line VAT Codes	Code	Sets the tax code on every order line.
Set Order Analysis Code / Set Line Analysis Code	Anl Code:, Value	Writes a value into a sales order (or line) analysis code.
Update Order Field / Update Line Field	Field, Value	Sets any field of the Sage order (or line).
Hold Order	–	Puts the Sage order on hold.
Add Stock Item	Stock Item, Quantity, Price:	Adds a stock line, in the order's warehouse.
Add Charge	Charge Code, Quantity, Price:	Adds a Sage additional charge line. Price: overrides the charge's own price when filled in.
Add Free Text	Text, Quantity, Price:	Adds a free text line.
Add Delivery Days	Date field, Value:, Monday to Friday	Sets the requested or promised delivery date to today plus the number of days in Value: ; tick Monday to Friday to count working days only.
Add Comment	Comment, Show on customer documents, Show on picking lists, Gift message	Adds a comment line. Gift message also uses it as the order's gift message.
Change Warehouse	Warehouse	Moves the order (or the matching lines) to another warehouse.
Allocate Line / Unallocate Line	–	Allocates the outstanding quantity of the matching lines, or removes their allocation.
Send Email	Recipients:, Subject:, Body:	Sends an email through the email server set in Tilted Settings ► Options . Separate recipients with commas or semicolons.
Complete Order / Return	–	After the order is created, despatches, invoices and posts it in Sage, as the channel option Complete sales order through to posting of invoice does (section 6.6). Orders that are on hold or not fully allocated are left for you to deal with, and a Complete Skipped event on the order's Channels tab explains why.

In text fields marked “Use [MappingFieldName] in the text to merge in values”, type a mapping field name in square brackets to include its value, for example **Order** [Customer Document No] needs checking.

The 'Action' dialog box is titled 'Action' and contains a section titled 'Action Details'. It has the following fields:

- Action Type:** A dropdown menu set to 'Predefined'.
- Action:** A dropdown menu set to 'Send Email'.
- Recipients:** A text field containing 'orders@example.com'.
- Subject:** A text field containing 'Key account order [Customer Document No]'.
- Body:** A text area containing the text: 'Order [Customer Document No] for account [Customer Account Number] has had a welcome gift added. Please check it before despatch.'

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Action – Send Email

At **Before Processing** only these actions can be chosen: **Channel Switch**, **Set Line VAT Codes**, **Set Order Mapping Field Value**, **Set Line Mapping Field Value** and **Send Email** – the others need the Sage order (“The selected action is not available for execution method on this action”). **Complete Order / Return** needs **After Processing** (“Complete Order / Return is only available on an 'After Processing' action”).

Each action checks its required field when you click **Save** – for example “You need to choose a warehouse”, “You need to choose an additional charge” or “You need to enter a comment”.

10.6 Channels and customer groups

Action Channels

Click **Channels** in **Action Configuration**. Every channel is listed; tick the ones the action applies to and click **Save**. An action with no channels ticked never runs. Channels added after the action was created appear here unticked.

The 'Action Channels' dialog box is titled 'Action Channels' and contains a list of channels with checkboxes next to them. The list is as follows:

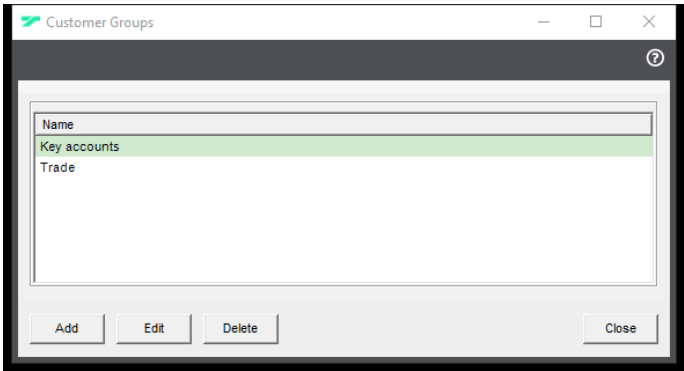
- ☐ Amazon UK
- ☐ Amazon UK FBA
- ☐ Amazon Direct Fulfillment
- ☒ Shopify Web Store
- ☒ WooCommerce Store
- ☐ Magento Store
- ☐ Squarespace Shop
- ☐ CS-Cart Store
- ☐ eBay UK
- ☐ Etsy Shop
- ☐ Temu UK
- ☐ DIY Marketplace (Miraki)
- ☐ Marketplacer
- ☐ ManoMano
- ☐ Wowcher
- ☐ Groupon
- ☐ Kornit
- ☐ Not on the High Street
- ☐ Channel Advisor
- ☐ ChannelEngine
- ☐ StoreFeeder

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Action Channels

Customer groups

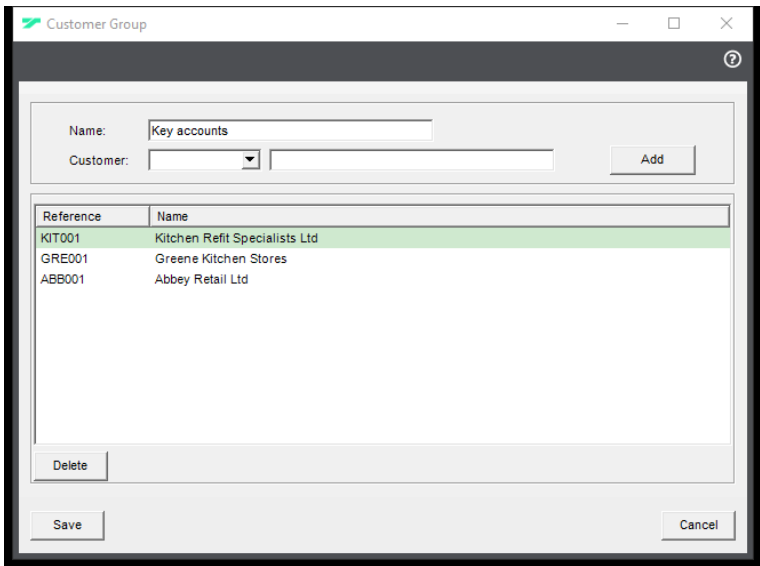
A customer group is a named list of Sage customer accounts. Set groups up from **Settings ▶ Actions ▶ Customer Group Setup**.



Customer Groups

Button	What it does
Add / Edit	Opens the Customer Group window.
Delete	Deletes the group, its members and its links to actions after “Are you sure you want to delete this customer group?”.
Close	Closes the list.

In the **Customer Group** window, enter the **Name**: (“Please enter a name for the customer group.”), pick a **Customer**: and click **Add** for each member (the list shows **Reference** and **Name**; a customer can only be added once), use **Delete** to remove a member, and click **Save**.



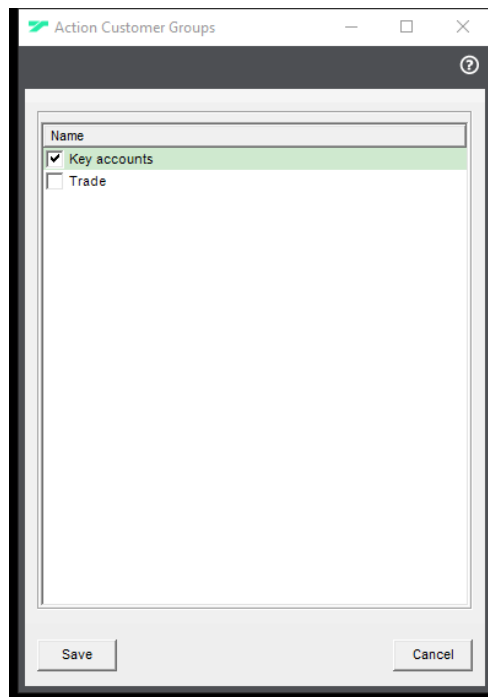
Customer Group

Restricting an action to customer groups

Click **Customer Groups** in **Action Configuration**, tick the groups and click **Save**. Then, at each execution point:

- If the order's customer belongs to a group that has actions ticked, only those group actions run for that order; the unrestricted actions at that point are skipped.
- Otherwise only the actions with no customer groups ticked run.

The customer is the Sage order's customer account or, at **Before Processing**, the mapped **Customer Account Number**.



Action Customer Groups

10.7 Example

To hold large non-EU orders from two channels for a check:

1. On **Settings ► Actions** click **Add**. Enter the **Name**: **Hold high value orders**, tick **Enabled**, set **Execution**: to **After Processing** and **Operator**: to **And**.
2. Under **Criteria** click **Add**: **Source Type**: **Sales Order**, **Source**: the order's gross total field, **Operator**: **Greater than**, **Value**: **500**. Click **Save**.
3. Add a second criterion: **Source Type**: **Mapped Order Field**, **Source**: **Delivery Country Code**, **Operator**: **Is not EU**. Click **Save**.
4. Under **Actions** click **Add**, choose **Hold Order** and click **Save**. Add another: **Add Comment**, **Comment** **Held for value check**, tick **Show on picking lists**, click **Save**.
5. Click **Channels**, tick the two channels and click **Save**. Then click **Save** in **Action Configuration**.

To hold orders from customers who are over their credit limit, or more than a week late paying:

1. On **Settings ► Actions** click **Add**. Enter the **Name**: **Credit hold**, tick **Enabled**, set **Execution**: to **Before Committing** and **Operator**: to **Or**.
2. Under **Criteria** click **Add**: **Source Type**: **Customer Credit**, **Source**: **Over Credit Limit**, **Operator**: **Equal to**, **Value**: **True**. Click **Save**.
3. Add a second criterion: **Source Type**: **Customer Credit**, **Source**: **Days Over Terms**, **Operator**: **Greater than or equal to**, **Value**: **7**. Click **Save**.
4. Under **Actions** click **Add**, choose **Hold Order** and click **Save**.
5. Click **Channels**, tick the channels and click **Save**. Then click **Save** in **Action Configuration**.

11. Inventory and stock feeds

Channels keeps your marketplaces, web stores, trading partners and customers up to date with how much of each item you can sell. This chapter explains how that figure is worked out, the difference between full

and delta feeds, the inventory snapshot that sits behind every stock feed, the **Inventory** channel that sends stock files to customers, and the **Inventory List** screens found under each channel.

11.1 How Channels works out the stock it sends

Channels does not read Sage stock levels item by item every time a feed is made. It works from an **inventory snapshot**: a stored copy of every active stock item's free stock, physical stock, back orders and next available date, calculated across the warehouses you choose on the **Inventory** tab of **Settings** (section 11.4). Full feeds read the snapshot; delta feeds recalculate only the items that have moved (section 11.2).

Free stock

For each active stock item that has a record in one of the snapshot warehouses, Channels calculates:

- **Sage free stock** – the item's free stock in each snapshot warehouse (stock in the warehouse less stock already allocated to sales orders and to customers), added together across the warehouses.
- **Plus build potential** – when **Include BoM potential build quantity** is ticked, the number of complete items that could be built from the free stock of the components on the item's active bill of materials. When **Include Sicon Kitting potential build quantity** is ticked, the same for Sicon kits. A component that is itself a BoM or kit item counts its own build potential too. Only whole items are counted.
- **Less back orders** – when **Reduce free stock by back order quantity** is ticked, the unallocated quantity on live sales orders is taken off (never below zero).
- **Less the system-wide buffer** – when **Apply buffer** is ticked, the buffer quantity is taken off every item (never below zero).

Physical stock is the confirmed plus unconfirmed quantity in stock across the snapshot warehouses. The snapshot also keeps the figure before the buffer and back orders were taken off (**Actual Free Stock**), which is used where a channel or item has its own buffer.

Allocations and reservations

Stock allocated to a sales order or to a customer is not free stock, so it is never offered to a marketplace or web store. Sicon stock reservations are held by Sage as customer allocations, so they are treated in exactly the same way.

When **Include customer allocations** is ticked, the snapshot also records how much of each item is allocated to each customer. The **Inventory** channel uses this to add a customer's own allocated stock back into that customer's stock file, so a customer sees the stock you are holding for them (section 11.5). Only allocations in the snapshot warehouses are counted.

Next available date

When **Calculate next available date** is ticked, the snapshot records for each item the date and quantity of the next purchase order delivery due into the snapshot warehouses (the delivery date on the purchase order line, or the order's requested date). The options below refine it:

Field	What it does
Use Sicon pre-allocated quantities for calculation	Quantities already pre-allocated to sales orders in Sicon are taken off each purchase order, so the next available quantity is what is genuinely uncommitted.
Use unallocated back orders for calculation	Unallocated back orders use up current free stock and then purchase order quantities, earliest delivery first; the next available date is the first delivery with stock left over. Cannot be used together with the Sicon option.

Field	What it does
Use back orders dates with Requested Date / Promised Date	Back orders are matched against the deliveries due before their requested (or promised) date, so later back orders do not consume earlier deliveries.
Date historic next available PO's as current date	A purchase order whose delivery date has passed is reported with today's date instead.
BoM component product groups to exclude	For BoM items the next available date comes from the scarcest component. Components in the product groups ticked in this window (packaging, for example) are ignored when choosing it (section 11.4).

Buffers, exclusions and fixed figures

Where it is set	What it does
Settings ► Inventory ► Apply buffer	A quantity taken off every item's free stock for every channel.
Channel Options ► Inventory tab ► Additional inventory buffer:	An extra quantity taken off for one channel only. With Replace system-wide inventory buffer ticked, this figure is used instead of the system-wide buffer (section 5.1).
Sage stock item ► Channels tab ► Overriding inventory buffer:	A buffer for one item that replaces the system-wide and channel buffers for that item (section 16.8).
Inventory channel ► Apply present zero buffer	Any item whose available figure is below the number given is reported as 0.
Inventory channel ► Excluded / Fixed Qty Items	Leave an item out of the files altogether, or always report a fixed quantity for it.

Warehouses

Where it is set	What it does
Settings ► Inventory ► Warehouses	The snapshot warehouses. Every channel counts the stock in these warehouses unless it is restricted below.
Channel Options ► Restrict to specific warehouses and Warehouses (on the Inventory channel: Specific Warehouses on the connection page)	The channel counts only the warehouses chosen (section 9.4). The snapshot stores separate figures for every warehouse chosen in this way, so after changing a channel's warehouse list create a new snapshot.
Channel Options ► Include virtual warehouses and Virtual Warehouses	Adds the free stock reported by the chosen Third Party Logistics channels – outsourced warehouses and drop-ship suppliers (section 9.4) – less the quantity of your orders they still have to ship.

Kits and bundles

- **Sage bills of materials and Sicon kits** add their build potential to the item's own free stock, as described above.
- **Channels bundles** (section 9.2) are sold under their own code. A bundle's stock is the smallest number of complete bundles its components allow (component free stock divided by the quantity in the bundle, whole bundles only), less the channel's additional buffer.

Prices

Stock files from the **Inventory** channel carry no prices. Channels that send prices with their stock levels (for example Mirakl, ChannelEngine and WooCommerce) take the selling price from the Sage price band chosen on the channel's own wizard page, and ChannelEngine can add a percentage uplift – see the Channel Reference, chapters 12, 21 and 5. Product data feeds can include any price band as a column (section 12).

11.2 Full and delta feeds

	Full feed	Delta feed
Which items	Every item the channel lists. For marketplaces and web stores that is the listings downloaded from the channel; for the Inventory and EDI channels it is every active stock item (in the chosen product groups) plus bundles.	Only items that have had a stock movement in Sage since the channel's last feed, plus the BoM and kit items built from them and the bundles that contain them.
Where the figures come from	The latest inventory snapshot.	Recalculated from Sage at the time the feed is made. The next available date and back order quantity come from the snapshot.
Before you can use it	A snapshot must exist.	A full feed must have been made first for that channel.
Typical use	Once a day, after the overnight snapshot.	Every few minutes or hours through the day.

Each full feed records the point in Sage's stock history that its snapshot was taken at, and each delta feed records the last movement it included, so the next delta picks up from there.

- When **Enable delta snapshot updates** is ticked, a delta feed also refreshes the snapshot figures for the items it recalculates.
- New purchase orders and changed delivery dates do not move stock, so their next available dates are picked up by the next full snapshot.
- **Pause Feeds** on the **Inventory** tab of **Settings** stops the scheduled jobs that create inventory feeds, for every channel, until you click **Unpause Feeds**. Feeds you create by hand, and feeds already created, are not affected.

A sensible schedule is: create the inventory snapshot overnight, then the full feeds; through the day run **Delta update inventory snapshot** and the delta feeds; and run the upload jobs after each. See section 15 for job bags.

11.3 Inventory snapshots

Creating and updating the snapshot

Where	What it does
Settings ► Inventory ► Create Snap Shot , the Inventory List screens, or the System job Create inventory snapshot	Builds a complete new snapshot. On a large company this can take some time; the previous snapshot stays in use until the new one is finished. Channels keeps the new snapshot and the one before it, and deletes older ones.
Settings ► Inventory ► Delta Snap Shot Update , or the System job Delta update inventory snapshot	Refreshes the items that have had stock movements since the last update, and the next available dates of items with goods received or Sicon pre-allocation changes.

The **Settings** buttons save the Settings screen before they run. When **Use responsive operations** is ticked (section 3.1) a progress window with a **Cancel** button is shown; cancelling a snapshot leaves the previous one in use.

Viewing the snapshot

View Snap Shot on the **Inventory** tab of **Settings**, or **Edit Latest Snap Shot** on the Inventory channel's **Inventory List**, opens the **Inventory Snapshot Item List**.

Inventory Snapshot Item List							
Code	Name	Physical	Free Stock	Actual Free Sto...	Next Available D...	Next Available ...	Back Order Qty
ABBuiltIn/15/0/2	AB Built-In Cookers Single-Oven/300mm/...	24.00000	17.00000	19.00000		0.00000	5.00000
ABBuiltIn/15/1/2	AB Built-In Cookers Single-Oven/600mm/...	33.00000	21.00000	23.00000		0.00000	0.00000
ABBuiltIn/15/20/2	AB Built-In Cookers Single-Oven/500mm/...	31.00000	22.00000	24.00000		0.00000	10.00000
ABBuiltIn/15/21/2	AB Built-In Cookers Single-Oven/550mm/...	36.00000	26.00000	28.00000		0.00000	2.00000
ABBuiltIn/16/0/2	AB Built-In Cookers Double-Oven/300mm/...	25.00000	15.00000	17.00000		0.00000	1.00000
ABBuiltIn/16/1/2	AB Built-In Cookers Double-Oven/600mm/...	31.00000	26.00000	28.00000		0.00000	12.00000
ABBuiltIn/16/20/2	AB Built-In Cookers Double-Oven/500mm/...	34.00000	25.00000	27.00000		0.00000	10.00000
ABBuiltIn/16/21/2	AB Built-In Cookers Double-Oven/550mm/...	32.00000	27.00000	29.00000		0.00000	0.00000
ABCookHoods/...	AB Cooker Hoods Chimney/White	14.00000	5.00000	7.00000		0.00000	6.00000
ABCookHoods/...	AB Cooker Hoods Standard/White	17.00000	10.00000	12.00000		0.00000	0.00000
ABFSE/12/0/2	AB Freestanding Electric 2-Ring/300mm/...	31.00000	27.00000	29.00000		0.00000	4.00000
ABFSE/12/1/2	AB Freestanding Electric 2-Ring/600mm/...	34.00000	28.00000	30.00000		0.00000	2.00000
ABFSE/12/20/2	AB Freestanding Electric 2-Ring/500mm/...	28.00000	25.00000	27.00000		0.00000	0.00000
ABFSE/12/21/2	AB Freestanding Electric 2-Ring/550mm/...	35.00000	30.00000	32.00000		0.00000	4.00000
ABFSE/13/0/2	AB Freestanding Electric 3-Ring/300mm/...	32.00000	30.00000	32.00000		0.00000	7.00000
ABFSE/13/1/2	AB Freestanding Electric 3-Ring/600mm/...	37.00000	25.00000	27.00000		0.00000	4.00000
ABFSE/13/20/2	AB Freestanding Electric 3-Ring/500mm/...	39.00000	31.00000	33.00000		0.00000	2.00000
ABFSE/13/21/2	AB Freestanding Electric 3-Ring/550mm/...	38.00000	28.00000	30.00000		0.00000	0.00000
ABFSE/14/0/2	AB Freestanding Electric 5-Ring/300mm/...	30.00000	27.00000	29.00000		0.00000	6.00000
ABFSE/14/1/2	AB Freestanding Electric 5-Ring/600mm/...	31.00000	24.00000	26.00000		0.00000	8.00000
ABFSE/14/20/2	AB Freestanding Electric 5-Ring/500mm/...	36.00000	25.00000	27.00000		0.00000	4.00000

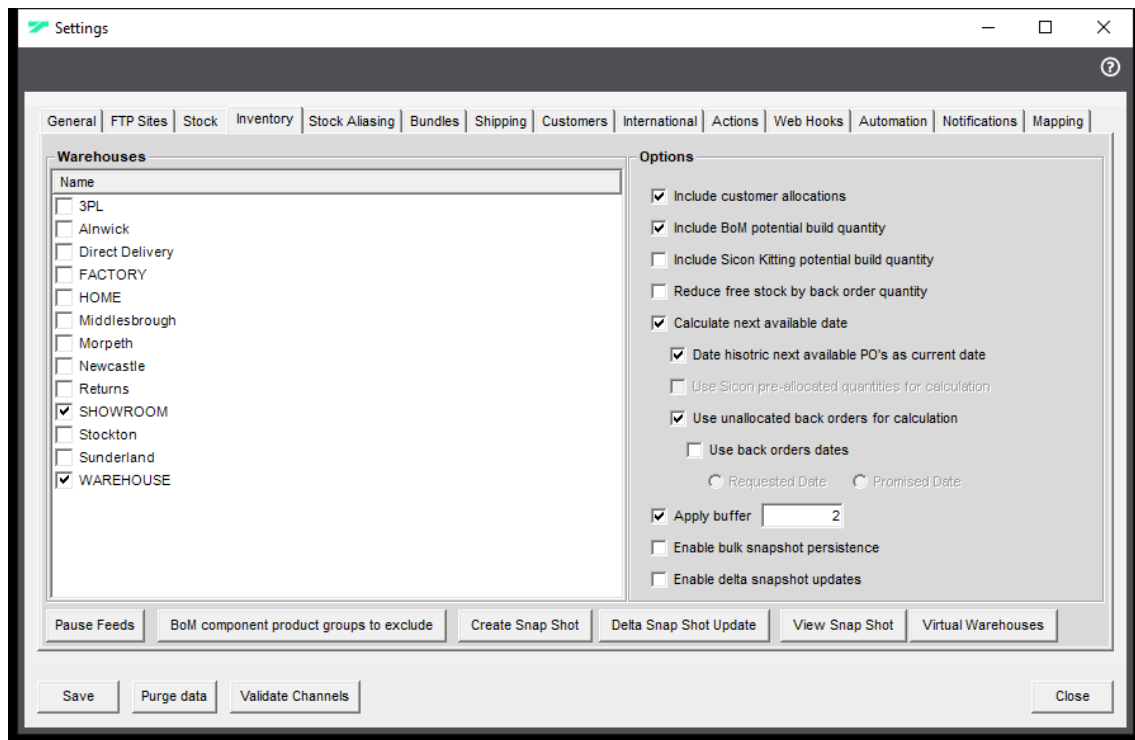
Save
Allocations
Channel Specific Warehouses
Cancel

Inventory Snapshot Item List

Column or button	What it does
Code, Name	The stock item.
Physical	Confirmed plus unconfirmed stock in the snapshot warehouses.
Free Stock	The figure the feeds use (after build potential, back orders and the system-wide buffer).
Actual Free Stock	Free stock before the back orders and buffer were taken off.
Next Available Date, Next Available Qty	The next purchase order delivery (when next available dates are calculated).
Back Order Qty	Unallocated quantity on live sales orders.
Allocations	Opens the Inventory Snapshot Customer Allocation List for the item (Customer, Quantity). Double-click a row first; the button is available when the item has customer allocations.
Channel Specific Warehouses	Opens the Inventory Snapshot Channel Specific Warehouse List (Warehouse, Physical, Free Stock, Actual Free Stock) for channels restricted to specific warehouses.
Save / Cancel	Save stores any figures you have typed over.

11.4 Settings ► Inventory

Open **Channels ► Settings** and select the **Inventory** tab. These settings apply to every channel. Changes take effect at the next snapshot (and, for delta feeds, at the next feed). Click **Save** to keep them.



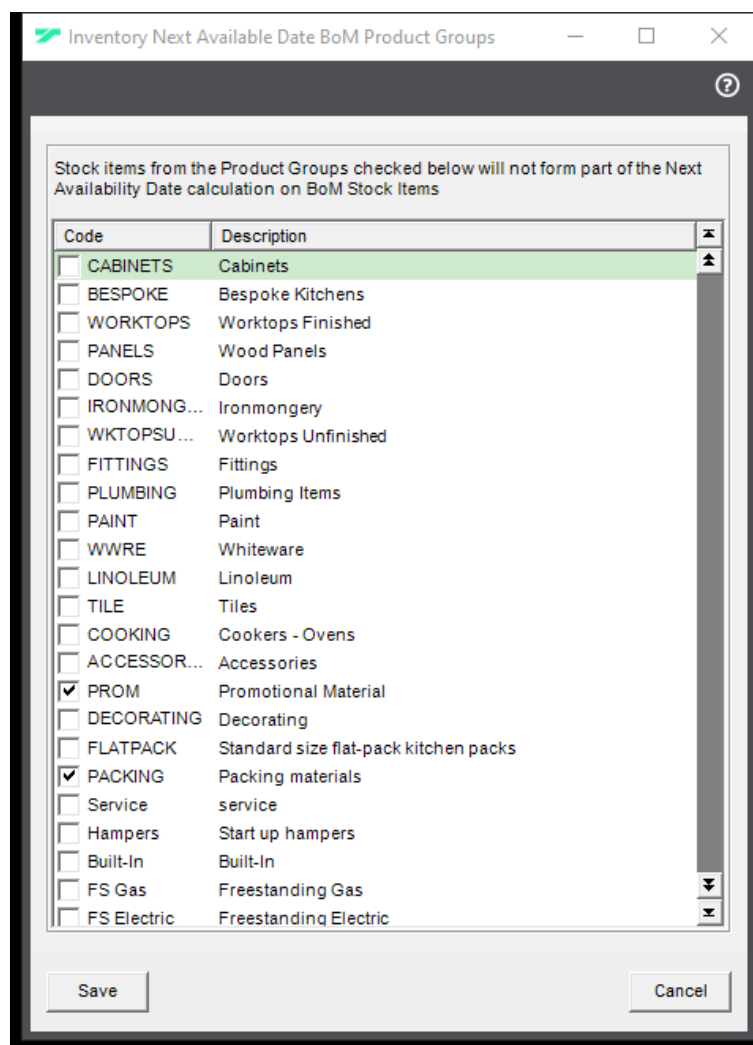
Settings – Inventory tab

Field or button	What it does
Warehouses	Tick the warehouses whose stock is counted (the snapshot warehouses). They are also the warehouses Channels searches when it matches an order's SKU to a stock item and when a channel is allowed to switch warehouse (section 6.6). The default warehouse is used when none is ticked.
Include customer allocations	Record each customer's allocated stock in the snapshot so the Inventory channel can add it back for that customer.
Include BoM potential build quantity	Add the quantity that could be built from components (active bill of materials).
Include Sicon Kitting potential build quantity	Add the quantity of Sicon kits that could be made up from components. Delta feeds then also include kits whose components have moved.
Reduce free stock by back order quantity	Take unallocated back orders off free stock.
Calculate next available date	Work out next available dates and quantities from purchase orders. Enables the next four options.
Date historic next available PO's as current date	Report overdue purchase order dates as today.
Use Sicon pre-allocated quantities for calculation	Reduce purchase order quantities by Sicon pre-allocations.
Use unallocated back orders for calculation	Let back orders use up stock and purchase orders before the next available date is chosen.
Use back orders dates, Requested Date / Promised Date	Match back orders to deliveries by date.
Apply buffer and quantity	The system-wide buffer: this quantity is held back of every item from all channels (section 11.1).
Enable delta snapshot updates	Delta feeds also refresh the snapshot figures of the items they recalculate.
Pause Feeds / Unpause Feeds	Stop or restart the scheduled creation of inventory feeds for all channels – for example while you correct stock in Sage. Asks “Are you sure you want to pause the inventory feeds?” and takes effect immediately.
BoM component product groups to exclude	Opens Inventory Next Available Date BoM Product Groups (below). Available when Calculate next available date is ticked.

Field or button	What it does
Create Snap Shot	Save the settings and create a new snapshot ("Snap shot successfully created").
Delta Snap Shot Update	Save the settings and update the snapshot for recent movements ("Snap shot successfully updated").
View Snap Shot	Open the snapshot (section 11.3).
Virtual Warehouses	Opens Virtual Warehouses , which shows the stock each Third Party Logistics channel has reported: choose the Channel : to list its items with their free stock and next available date and quantity (section 9.4).

BoM components left out of the next available date

When **Calculate next available date** is ticked, Channels works out when a bill of materials item will next be available from its most limiting component. Click **BoM component product groups to exclude** to open **Inventory Next Available Date BoM Product Groups**, tick the product groups (**Code, Description**) whose items should not count – packaging, for example – and click **Save**.



Inventory Next Available Date BoM Product Groups

11.5 The Inventory channel – stock files for customers

The **Inventory** channel sends a stock file to each of your customers (or anyone else who needs one) by email, FTP or a REST end point. Each file is personalised for the customer it goes to: their own item codes, their allocated stock and their choice of items. You can have as many Inventory channels as you need, each with its own items, file layout and recipients.

Setting up an Inventory channel

1. Open **Channels** ► **Channel List**, click **Add** and choose **Inventory** (section 4.2).
2. On the connection page enter a **Name**, tick **Enabled** and choose the items to include (table below).
3. On the distribution page add the recipients.
4. On the email details page enter the **Subject:** and **Body:** used when a file is emailed.
5. On the file template page choose the format (CSV, XML or JSON), delimiter, headers and so on (section 4.9).
6. On the **Customisation** page open **Value Mapping** ► **Fields** and choose what goes in each column (section 5.3 and the list of values below).
7. Click **Save**.

Connection page

Inventory channel – connection page

Field	What it does
Name:	The channel's name. Required – “You need to provide a name”.
Enabled	Only enabled channels appear on the Inventory List and run in jobs.
Include NAD when less than:	Include the next available date and quantity only for items whose available quantity is at or below this figure. Leave at 0 to always include them.
Apply present zero buffer and quantity	Report any item whose available figure is below the quantity as 0.
All product groups	Include items from every product group. Untick it and click Product Groups to choose groups.
Product Groups	Opens Product Groups : tick the groups to include (Check All , Invert), then Save .
Specific Warehouses and Warehouses (n)	Count stock in the chosen warehouses only. The link opens Specific Inventory Warehouses (section 9.4).

Field	What it does
Virtual Warehouses and Virtual Warehouses (n)	Add the stock held by Third Party Logistics channels – outsourced warehouses and drop-ship suppliers. The link opens Virtual Warehouses , where you tick the channels to include (section 9.4).
Excluded / Fixed Qty Items	Opens Exclusions (below).
Analysis Code Filters	Opens Analysis Code Filters (below).

Exclusions

Choose a **Product Group**: on the left to list its items, tick the items and click **Add** to move them to **Excluded / Fixed Qty Items** on the right. Then, for each item, either set **Exclude** to Yes to leave it out of every file, or type a **Fixed Qty** to always report that quantity. **Remove** takes the ticked items off the list. Click **Save**.

The screenshot shows the 'Exclusions' window. On the left, under 'Items', the 'Product Group' is set to 'ACCESSORIES'. A list of items is shown with checkboxes:
☒ ACS/TOAST... Polished Steel 4 Slice Toaster
☐ ACS/BLEND... Professional Blender 5 Speed
☐ ACS/MIXER Professional Mixer 3 Speed
☐ ACS/FILTE... Filter Coffee Maker
☐ ACC/COFF... Intallian Coffee Maker
At the bottom of this list are buttons: 'Check all', 'Invert', and 'Add'.
On the right, under 'Excluded / Fixed Qty Items', there is a table:

Code	Name	Exclude	Fixed Qty
☐ ACS/MEAT...	Commercial Meat Slicer	☒	
☐ ACS/ESPR...	Espresso Machine	☐	50

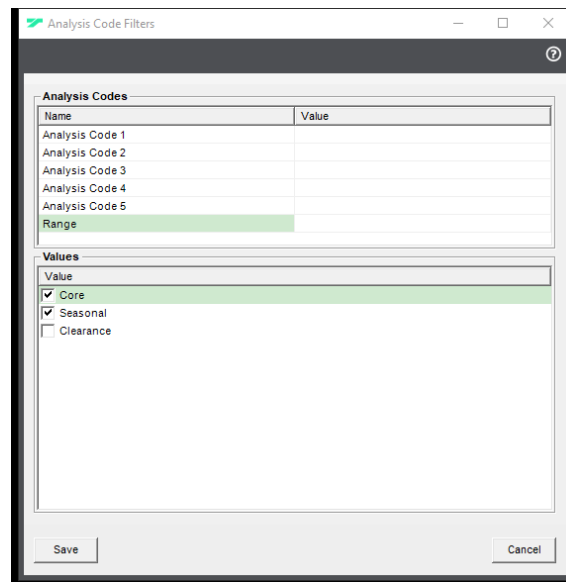
At the bottom of this table are buttons: 'Check all', 'Invert', and 'Remove'.
At the very bottom of the window are buttons: 'Save' and 'Cancel'.

Exclusions

A fixed quantity must be blank or a number: "Fixed qty needs to be empty or a number on 'ABC123'".

Analysis code filters

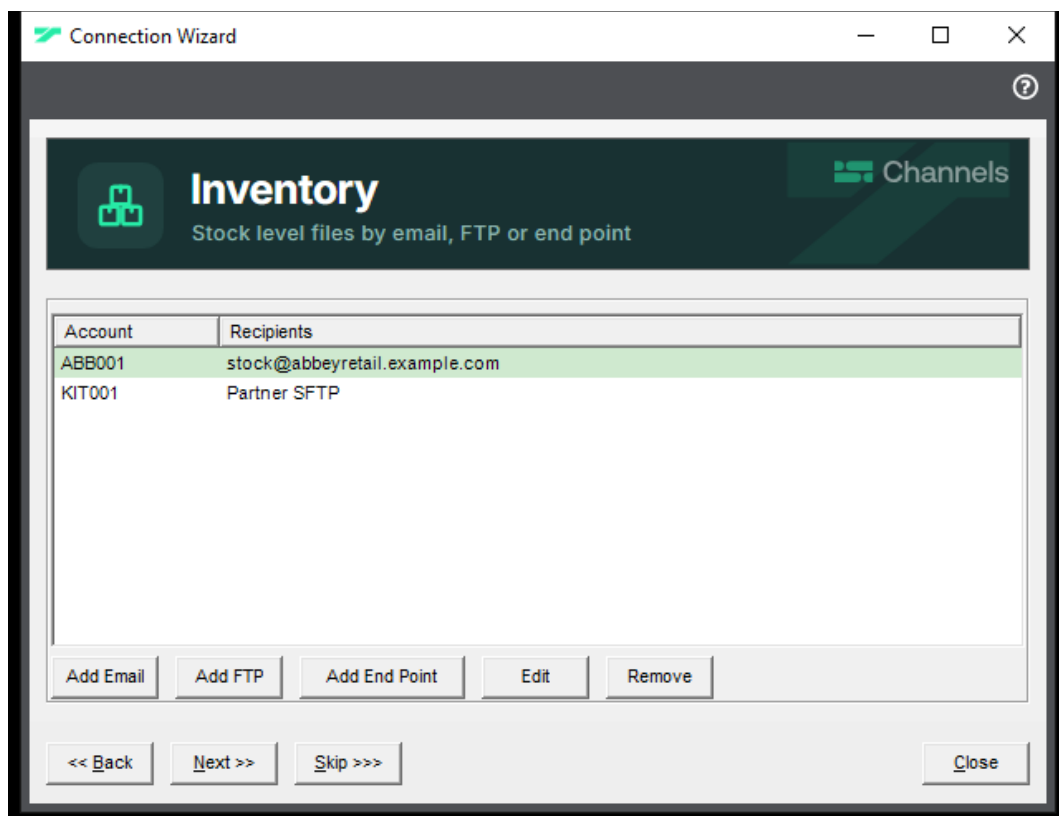
Limit the items to those with particular stock item analysis code values. Click an analysis code in **Analysis Codes**: if it has a list of values, tick the values to include in **Values**; otherwise type the value to match in the **Value** column. An item must match every filter you set. Click **Save**. Filters apply to full and delta files; bundles are not filtered.



Analysis Code Filters

Distribution page – recipients

Each recipient receives its own file. The list shows the **Account** and the **Recipients** (email addresses, FTP site or end point).



Inventory channel – distribution page

Button	What it does
Add Email	Opens Email Recipient . Saved as soon as you click Save in the dialog.
Add FTP	Opens FTP Recipient .
Add End Point	Opens End Point Recipient , to post the file to a web address (URL, method and authentication – section 5.10). End point files are never zipped.
Edit	Opens the selected recipient (or double-click it).
Remove	Removes the selected recipient.

The screenshot shows a window titled 'Email Recipient'. Inside, there's a form with the following elements:

- Customer:** A dropdown menu showing 'ABB001' and a text field showing 'Abbey Retail Ltd'.
- Emails:** A text field containing 'stock@abbeyretail.example.com'.
- Default Extension:** A checked checkbox.
- Compressed:** An unchecked checkbox.
- Only include items with customer codes:** An unchecked checkbox.
- Filename:** A text field with a placeholder '(can leave blank)'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Email Recipient

Field	What it does
Customer:	Required. The Sage customer the file is for – their allocations, their item codes and their account reference go into the file.
Emails: (email) / Connection: and Folder: (FTP)	Where the file goes. Separate several email addresses with commas or semicolons. FTP connections are set up on Settings ► FTP Sites (section 3.2).
Default Extension	Ticked: the file is named with its feed number and the extension of the file format (for example 0000012345.csv).
Filename:	Untick Default Extension to send the file under a fixed name every time (can be left blank, in which case the feed number with .txt is used).
Compressed	Send the file zipped.
Only include items with customer codes	Send only the items for which this customer has their own item code.

What goes in each customer's file

When the files are created Channels builds one list of items for the channel, then for each recipient:

- adds one row per customer item code (taken from the customer stock codes chosen under **Aliasing** on **Settings ► Stock**, section 9.1), or one row with a blank code when the customer has none;
- drops excluded items, and items without a customer code when **Only include items with customer codes** is ticked;
- replaces the figure of fixed-quantity items with the fixed quantity;
- applies the present zero buffer, then adds the customer's own allocated stock when **Include customer allocations** is ticked.

The values you can place in the columns are:

Value	What it holds
Code, Name, Description, Barcode, PartNumber, Weight	From the Sage stock item.
ProductGroupCode, ProductGroupName	The item's product group.
AnalysisCode1 – AnalysisCode20	The item's analysis code values.
CustomerItemCode	The recipient customer's own code for the item.
CustomerAccountCode	The recipient customer's account reference.
Available	The quantity to offer: free stock after buffers, fixed quantity and the present zero rule, plus the customer's own allocated stock.
AvailableExcludingCustomerAllocations	As Available, without the customer's allocated stock.
CustomerAllocated	The customer's allocated stock.

Value	What it holds
Physical	Physical stock.
IsInStock	1 when the item is offered as in stock (Available above zero), otherwise 0.
AllowSalesOrder	1 when the item can be used on sales orders, otherwise 0.
NextAvailableDate, NextAvailableQuantity	The next purchase order delivery.
BackOrderQuantity	Unallocated quantity on live sales orders.
ItemID	Sage's internal item number.

Fixed values and formatting can be added in the mapping as for any other file (sections 5.3 and 5.4).

Creating the files – Inventory List

Open **Channels** ► **Text & Excel Files** ► **Inventory List**.

Inventory List

Field or button	What it does
Channels	Your enabled Inventory channels. None is ticked when the screen opens; tick the ones you want (Check All , Invert).
Recipients	The recipients of the ticked channels, all ticked. Untick any you want to leave out this time.
Snap Shot Details	When the latest snapshot was taken.
Generate New Snap Shot	Create a new inventory snapshot now (section 11.3).
Edit Latest Snap Shot	Open the latest snapshot.
Create Full Feeds	Create one file per ticked recipient from the latest snapshot.
Create Delta Feeds	Create one file per ticked recipient containing only the items that have moved since the channel's last feed.
Close	Close the screen.

A message such as “Successfully created inventory export feeds for 2 modules” confirms the files were created. Creating files does not send them.

Sending the files

Each file is an export feed of type **Text file inventory** (section 14). It is sent when it is submitted on **Channels ► Export Feeds**, or by the channel's **Upload inventory feeds** job. Emails use the subject and body from the email details page; FTP files go to the chosen folder; end points receive the file itself. An empty file is not sent.

The channel's jobs are **Create snap shot**, **Create inventory feeds**, **Create delta inventory feeds** and **Upload inventory feeds** (section 15.4).

11.6 Inventory lists for marketplaces and web stores

Most channels have an **Inventory List** under their own menu (for example **Channels ► Shopify ► Inventory List**). It lets you see the stock Channels would send before you create a feed. Each channel's matching rules are described in its chapter of the Channel Reference.

The screenshot shows a window titled 'Inventory List' with a search bar and a list of channels. The 'eBay UK' channel is selected. The 'Snap Shot Details' section shows the latest snap shot was taken at 15:15 on 02 October 2026. Below this is a table with columns: SKU, Name, Channel Code, and Free Stock. The table lists several items, including Professional Blender 5 Speed, Espresso Machine, Filter Coffee Maker, Professional Mixer 3 Speed, Polished Steel 4 Slice Toaster, Bench Top Beer Fridge, Deluxe Icecream Maker, and Washer Dryer 1200 spin. At the bottom of the window are buttons for 'Create Feeds', 'Generate Full List', 'Generate Delta List', 'Refresh Inventory Items', and 'Close'.

SKU	Name	Channel Code	Free Stock
ACS/BLENDER	Professional Blender 5 Speed	326104559007	113.00000
ACS/ESPRESSO	Espresso Machine	326104559144	129.00000
ACS/FILTER-C...	Filter Coffee Maker	326104559281	145.00000
ACS/MIXER	Professional Mixer 3 Speed	326104559418	103.00000
ACS/TOASTER	Polished Steel 4 Slice Toaster	326104559555	61
SUM/BENCHF...	Bench Top Beer Fridge	326104559692	15.00000
SUM/ICECREA...	Deluxe Icecream Maker	326104559829	28.00000
WWWASHDR...	Washer Dryer 1200 spin	326104559966	4.00000

Inventory List for a marketplace channel (eBay)

Field or button	What it does
Channels	The enabled channels of this type. Tick one; ticking another unticks the first.
Snap Shot Details / Create Snap Shot	When the latest snapshot was taken; create a new one.
Refresh Inventory Items	Download the channel's current listings (SKUs) so Channels knows which items to send. This contacts the channel.
Generate Full List	List every listed item with its figure from the latest snapshot. Nothing is sent.
Generate Delta List	List only the items that have moved since the channel's last feed, with recalculated figures.
Create Feeds	Create an inventory feed from the list on screen ("Inventory feed successfully created"). It is sent from Channels ► Export Feeds or by the channel's Upload inventory feed job.
Close	Close the screen.

The list shows **SKU**, **Name**, **Channel Code** and **Free Stock**. On channels that use the older style of list the columns are **Code**, **Name**, **Sage**, **Cache** and **Channel** (the channel's current figure); rows where Sage and the channel differ are highlighted in yellow, and **Upload All** sends every item rather than only the

differences. On these lists **Generate Full List** and **Generate Delta List** read the current figures from the channel, so they contact the channel too.

Generate a list first – **Create Feeds** asks “You need to generate an inventory list first” otherwise. An empty delta list (“Delta inventory creation has returned no results. This may be due to there being no movements since the last update”) is normal when nothing has moved.

12. Products

This chapter covers the **Products** channel, which sends your stock item data to trading partners, marketplaces and websites, and the **Import / Export Product Data** screen for maintaining stock item analysis codes in a spreadsheet.

12.1 Product data feeds

The **Products** channel sends a file of stock item data – codes, descriptions, barcodes, analysis codes, price band prices and, with Sicon, Sicon fields – to a trading partner, marketplace or website, by email, FTP or a REST end point. The file format (CSV, XML or JSON) and its columns are designed in the **Product Feed** designer, which can build the design from a sample file supplied by the partner.

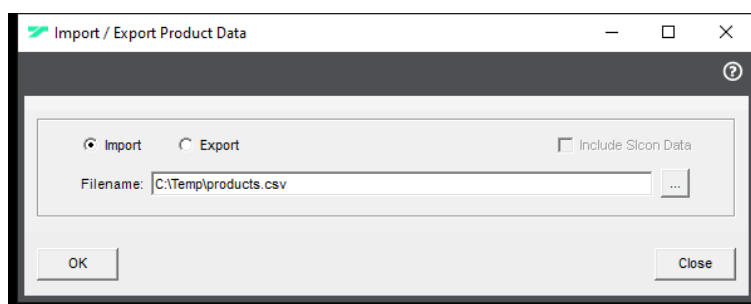
Setting up a Products channel, designing the file, filters, recipients and full and delta feeds are described step by step in the separate **Products Export – Operator Guide**. In summary:

Task	Where
Create or edit a Products channel	Channels ▶ Channel List (Add / Edit, section 4) – connection page (Name: , Enabled , Include Sicon analysis code data , Filters , File Options), distribution, email details, Customisation page (Value Mapping ▶ Fields opens the designer).
Create feeds on demand	Channels ▶ Text & Excel Files ▶ Products ▶ Product List – tick channels and recipients, then Create Full Feeds or Create Delta Feeds .
Send, check and resend feeds	Channels ▶ Export Feeds (section 14). Product feeds are of type Product data .
Schedule	Jobs Create product feeds , Create delta product feeds , Upload product feeds (section 15.4).

A delta feed contains only the items whose exported values have changed since they were last sent; when nothing has changed no feed is created, and the **Product List** says so (“... (a module with nothing changed creates no feed)”).

12.2 Import / Export Product Data

Channels ▶ **Text & Excel Files** ▶ **Products** ▶ **Import / Export Product Data** lets you maintain stock item analysis codes in a spreadsheet: export them to a CSV file, change the values, and import the file back.



Import / Export Product Data

Field or button	What it does
Import / Export	Choose the direction. Import is selected when the screen opens.
Filename: + ...	The CSV file to read (import) or write (export).
Include Sicon Data	Also export and import the Sicon stock item analysis fields. Available only when Sicon is installed.
OK	Run the import or export.
Close	Close the screen.

Exporting

The export writes a CSV file with a header row: **Code**, then one column per stock item analysis code that has a name in Sage (and the Sicon analysis fields when included), and one row per stock item. “Product data exported” confirms it. If two analysis codes share the same name the export stops and lists them – rename one in Sage so every column is unique.

Importing

1. Export the data, edit the values in the CSV file and save it as CSV. Keep the **Code** column and the column headings as exported; you can delete columns you are not changing.
2. Select **Import**, choose the file and click **OK**.
3. “All updates were imported successfully” confirms every row. Otherwise “Some errors occurred whilst importing updates” is shown and, after **OK**, a list of the items that could not be updated and why. The other rows are still imported.

Important: The import writes the values straight onto your stock items. A blank cell clears that analysis code for the item.

13. Shipments, tracking, invoices and credit notes

Once a Channels order is despatched in Sage, Channels tells the channel: it confirms the shipment with the courier and tracking details, and for some channels it also sends the invoice, credit notes and delivery confirmations. This chapter covers the shared screens for these; each channel's own rules are in the Channel Reference.

13.1 How despatches become shipments

For every Channels order that is not yet fully shipped, each Sage despatch note becomes a **shipment** with its courier, tracking number, service and lines. This happens whenever the **Shipment List** is searched and whenever the channel's shipment jobs run. Then:

- the order is marked **Shipped** when every line that needs despatching has been despatched in full, otherwise **Partially Shipped**; a completed order with nothing despatched is marked **Shipped** so it is not looked at again;
- the shipment is sent to the channel in a shipment feed, created from the **Shipment List** or by the channel's **Create shipment feeds** job, and sent straight away or by the **Upload shipment feeds** job depending on the channel (see the Channel Reference);
- a shipment that has been sent is not offered again.

If the channel's option **Await Carriers integration for automated shipments** is ticked (section 5.1), the scheduled jobs wait for the Carriers add-on to record the consignment before building the shipment – and, when **SSCC Mandatory** is ticked, for every carton to have an SSCC – for up to three days after the despatch, then build it anyway.

An order that is **on hold** in Sage is never built into a shipment, however much of it has been despatched and whether the job or the Shipment List is asking – the hold is your way of stopping a despatch going out (for example the Carriers add-on's Sicon option to hold an order whose label failed). Take the order off hold and it is picked up on the next run.

13.2 Where courier, tracking and service come from

Channels fills in each shipment from the following, in order. A later source only fills what an earlier one left blank.

Source	What it provides
The sales order's analysis codes	The analysis codes chosen on Settings ► General: Courier analysis code: , Tracking analysis code: and Ship service analysis code: (section 3.1).
Courier and service mapping	The courier is translated to the channel's own courier name with Value Mapping ► Couriers (section 5.5), and the service with Value Mapping ► Services (section 5.6).
Sicon courier data	When Use Sicon courier tracking data is ticked on Settings ► Shipping and there is no tracking number, the tracking number and service recorded by Sicon for the despatch; they are also written to the order's analysis codes.
Carriers add-on	The carrier, service and tracking number of the latest consignment, and one shipment line per carton with its SSCC, tracking number and quantity.
Third-party warehouse (3PL) box details	For orders fulfilled by a 3PL, the boxes the warehouse reported.
Import Carrier & Tracking or typing on the Shipment List	Your own values (section 13.3).

Some channels need certain details before a shipment can be sent. The channel options **Carrier Mandatory**, **Tracking Mandatory**, **Tracking URL Mandatory** and **SSCC Mandatory** (section 5.1) stop a shipment being ticked on the **Shipment List** until those details are present. A service whose **Shipping Service Mapping** row has **Default Tracking** set does not need a tracking number (section 5.6).

13.3 The Shipment List

Open the **Shipment List** under the channel's menu (for Text File channels, **Channels ► Text & Excel Files ► Shipment List**).

Shipment List

Channels Clear

Name

☒ Online Shop CSV ☐ Web Orders CSV

☐ New shipments

Shipments From: 25/09/2026

Find

Channel	Order Number	Document No	Despatch No	Date	Customer	Status	Courier	Tracking	URL
☐ Online Shop...	SHOP-2041	0000005163	0000005549	27/09/2026	Olivia Sample	Shipped	Royal Mail	TT204518352GB	https://www.roy...
☐ Online Shop...	SHOP-2042	0000005164	0000005550	28/09/2026	Harry Example	Shipped	DPD	15501234560028	https://track.dpd...
☐ Online Shop...	SHOP-2043	0000005165	0000005551	29/09/2026	Grace Sample	Shipped	Royal Mail		
☐ Online Shop...	SHOP-2044	0000005166	0000005552	29/09/2026	Noah Example	Partially Shipped	DPD	15501234560035	https://track.dpd...
☐ Online Shop...	SHOP-2045	0000005167	0000005553	26/09/2026	Amelia Sample	Shipped	Royal Mail	TT204518349GB	https://www.roy...

Enable Check Invert

Create Feed Regenerate Checked Import Carrier & Tracking Generate Tracking URLs Close

Shipment List

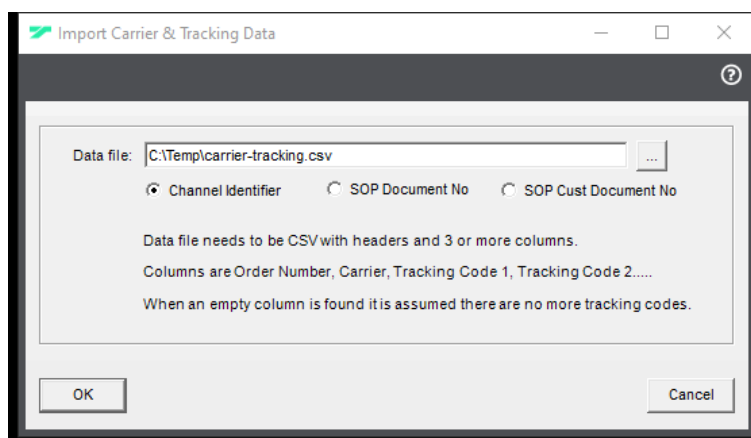
Field or button	What it does
Channels and Clear	The enabled channels of this type, all ticked. Clear unticks them.
New shipments	Ticked: show shipments not yet sent.
Shipments From:	Show every shipment despatched on or after this date (picking a date unticks New shipments).
Find	Build shipments for new despatches, refresh their details and tracking links, then list them.
Enable	Allow the selected rows to be ticked even when they have been sent or are missing mandatory details.
Check	Tick the selected rows (select rows first; Ctrl+A selects all). Up to 2,000 at a time.
Invert	Reverse the ticks on the selected rows.
Create Feed	Create the shipment feed for the ticked rows. Depending on the channel this sends the confirmations straight away.
Import Carrier & Tracking	Import courier and tracking numbers from a CSV file (below).
Generate Tracking URLs	Build the tracking links for the ticked rows (section 13.4).
Regenerate Checked	Asks "Are you sure you want to regenerate the selected shipments?" and deletes the ticked shipments so they are built again from the despatch at the next Find . A regenerated shipment is treated as new and is offered for sending again.
Close	Close the screen.

The list shows **Channel**, **Order Number** (the channel's order number), **Document No** (click to open the Sage order), **Despatch No**, **Date**, **Customer**, **Status** (**Not Shipped**, **Partially Shipped**, **Shipped**) and **Courier**, **Tracking** and **URL**, which you can type over; your changes are saved as you leave the cell.

Important: **Create Feed** on a channel that sends shipments immediately confirms the shipments to the marketplace there and then. Check the courier and tracking details first.

Import Carrier & Tracking

Use this when tracking numbers come from a courier system or spreadsheet. The file must be a CSV file with a header row and at least three columns: **order number**, **carrier**, **tracking number**, then any further tracking numbers in following columns (the first empty column ends the list).



Import Carrier & Tracking Data

1. Tick the channels on the **Shipment List** and click **Import Carrier & Tracking**.
2. Choose the **Data file:** and how the order number in the file is matched: **Channel Identifier** (the channel's order reference), **SOP Document No** or **SOP Cust Document No**.
3. Click **OK**. Every unsent shipment of each matched order is updated, and the courier and tracking number are written to the order's analysis codes. "Import Complete - 12 Updates Carried Out" reports how many orders were updated.

13.4 Tracking links, courier names and services

Channels builds a tracking link for each shipment from the courier's **Tracking URL** in **Courier Mapping** (section 5.7). Links are built for unsent shipments that have a tracking number but no link when the **Shipment List** is searched for **New shipments**, by **Generate Tracking URLs** on the **Shipment List**, and by the channel's **Generate Tracking URLs** job.

When a **Tracking URL analysis code:** is chosen on **Settings ► General**, Channels also shortens each link with Bit.ly (using the details on **Settings ► Notifications**) and writes the short link into that analysis code on the order, for use on documents and notifications.

Marketplaces expect their own courier and service names. The channel's **Couriers** value mapping (section 5.5) translates each Sage courier value into the name the channel expects, and its **Shipping Service Mapping** (section 5.6) does the same for the carrier service. The window is shown in section 5.6.

13.5 Invoice List and Credit Note List

Channels that receive invoices or credit notes (for example EDI partners and Text File channels) have an **Invoice List**, and some a **Credit Note List**, under their menu. When you click **Find**, Channels first records every posted Sage invoice or credit note raised against the channel's orders, then lists them. An order is marked invoiced when all its stock lines have been invoiced in full.

Invoice List

Field or button	What it does
Channels and Clear	The enabled channels of this type, all ticked. Clear unticks them.
New invoices (New credit notes)	Ticked: list invoices (credit notes) not yet sent.
Invoices from: (Credits from)	List every invoice (credit note) dated on or after this date.
Find	Record new invoices and credit notes, then list them.
Enable, Check, Invert	As on the Shipment List. Invoices already sent cannot be ticked until enabled.
Create Feed	Create the invoice (credit note) feed for the ticked rows, then search again.
Close	Close the screen.

Columns: **Channel**, **Reference** (the channel's order reference), **Invoice No / Credit No**, **Invoice Date / Credit Date**, **Order No / Return No** (click to open the Sage order or return), **Order Date / Return Date**, **Account** and **Delivery**. The jobs **Create invoice feeds**, **Upload invoice feeds**, **Create credit note feeds** and **Upload credit note feeds** do the same on a schedule.

13.6 Delivered orders

Some channels (for example Virtual Stock and Text File channels) want to know when an order has been delivered. When the Carriers add-on records a successful delivery, Channels stores the delivery date and the proof of delivery (POD) against the Channels order, ready to send. You can also type a delivery date yourself.

Open the delivery list under the channel's menu – **Delivered Order List** for Virtual Stock, **Channels ► Text & Excel Files ► Delivery List** for Text File channels; either way the screen is titled **Delivered Order List**. For Text File channels, only channels with delivery processing switched on are listed.

Delivered Order List

Field or button	What it does
Newly despatched orders and Max order age (days):	List delivered orders not yet confirmed to the channel, despatched within the number of days given (30 by default).
Orders From:	List every despatched order dated on or after this date, delivered or not – use this to enter delivery dates by hand.
Find	Search.
Columns	Channel, Order Number, Document No (click to open the Sage order), Despatch Date, Customer and Delivered Date .
Delivered Date	Type or pick the delivery date; it is saved immediately. Search again to tick the row.
POD	Text File channels: click to open the proof of delivery.
Enable, Check, Invert	As on the Shipment List. Only rows with a delivery date that have not been sent can be ticked.
Create Feed	Create the delivery feed for the ticked orders. “1 feeds have been successfully generated.” confirms it.

Delivery booked confirmations (Virtual Stock) are described in section 6.12.

14. Export feeds

This chapter explains export feeds – the files and messages Channels creates for channels and other recipients – and the **Export Feeds** screen, where you check what has been created and sent, send feeds by hand, and resend, roll back or trash them.

14.1 What an export feed is

Everything Channels sends out – order acknowledgements, shipment confirmations, invoices, credit notes, delivery confirmations, stock levels, product and customer data, orders for third-party warehouses and notifications – is first written as an **export feed**: a numbered file with a type, a channel, a recipient and a status. Creating a feed and sending it are separate steps, so you can check a feed before it goes, see exactly what was sent, and send it again if needed.

Status	Meaning
New	Created and waiting to be sent.
Processed	Sent successfully. The Processed column shows when.
Processed with errors	Creating or sending the feed failed, completely or for some of its contents. Click Errors to see why.
Rolled back	Cancelled, and its orders, shipments or invoices made available again so they go in the next feed.
Trashed	Set aside; it will not be sent and its contents are not offered again.

14.2 The life of a feed

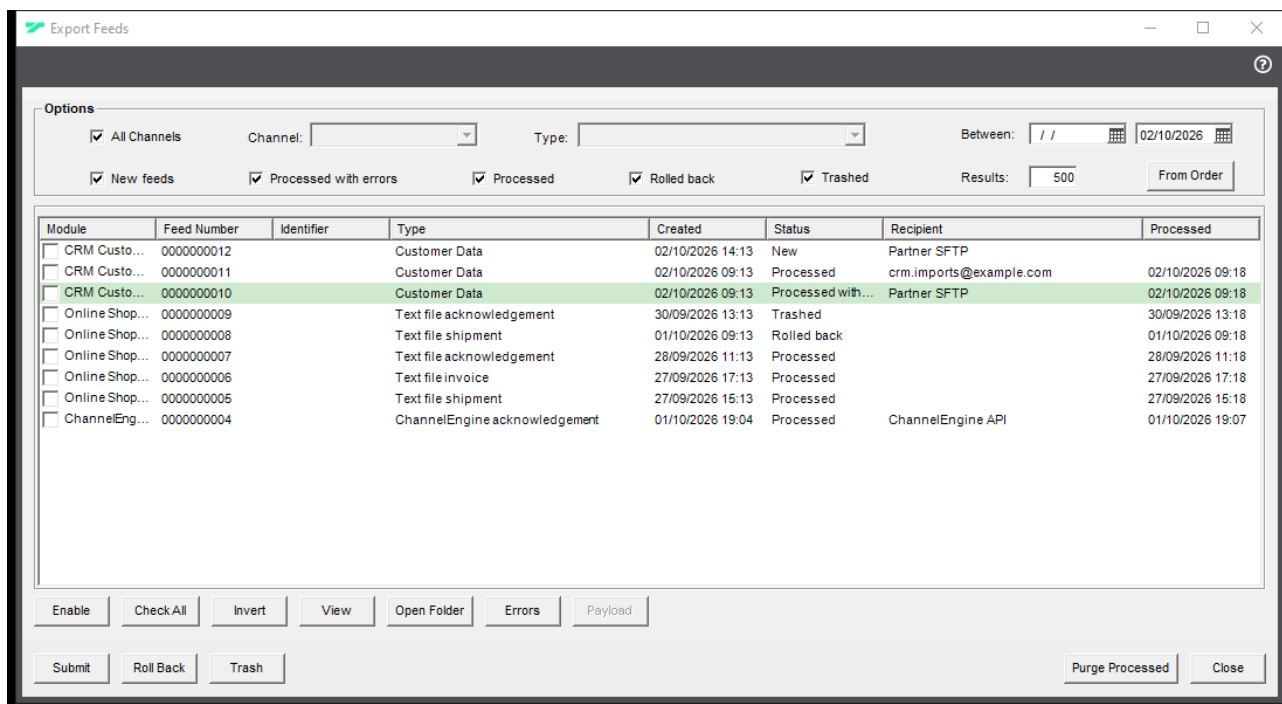
1. **Created** – by a **Create Feed(s)** button on a list screen or by a **Create ... feeds** job. The file is written to the feeds folder and the feed has status **New**. Some channels send at this point; most wait.
2. **Sent** – by **Submit** on the **Export Feeds** screen, or by the channel's **Upload ... feeds** job. The status becomes **Processed**, or **Processed with errors** with the reason recorded.
3. **Followed up** – a feed with errors is corrected and submitted again, rolled back so its contents go in the next feed, or trashed.

Upload jobs send **New** feeds only. A feed that ended **Processed with errors** is not retried automatically – submit it again from **Export Feeds** once the problem is fixed.

Feeds linked to sales orders also appear in the **Events** list on the order's **Channels** tab (created, posted, posted with errors, trashed, rolled back – section 16.1).

14.3 The Export Feeds screen

Open **Channels** ► **Export Feeds**. The screen opens showing up to 500 **New** and **Processed with errors** feeds for all channels, newest first.



Export Feeds

Finding feeds

Field or button	What it does
All Channels / Channel:	Untick All Channels to choose one channel.
Type:	Show one type of feed only (for example Text file inventory or Product data). Available when All Channels is unticked.
Between:	The range of creation dates (the second date defaults to today).
New feeds, Processed with errors, Processed, Rolled back, Trashed	Which statuses to show.
Results:	The maximum number of feeds listed (500 by default).
From Order	Pick a Sage sales order to list every feed that included it – acknowledgement, shipment, invoice, notification and warehouse feeds (“No export feeds found for selected order” when there are none).

The list shows **Module**, **Feed Number**, **Identifier**, **Type**, **Created**, **Status**, **Recipient** and **Processed**.

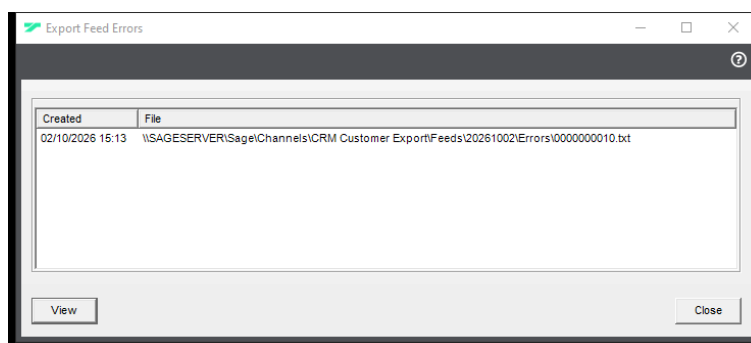
Working with feeds

Button	What it does
Enable, Check All, Invert	Tick feeds. Enable allows the highlighted feed to be ticked.
View	Open the highlighted feed's file.
Open Folder	Open the folder holding the feed's file.
Errors	Show the errors recorded for the highlighted feed.
Payload	Show the request files saved for the highlighted feed, where the channel keeps them.
Submit	Send the ticked feeds now. A feed that has already been processed is sent again. Each feed is sent on its own, so one failure does not stop the rest; any failures are listed at the end (“2 of 10 feed(s) failed to submit: ...”).
Roll Back	Asks “Are you sure you want to roll back the selected 3 feed(s)?”, then cancels the ticked feeds and makes their contents available again so they go in the next feed.
Trash	Asks “Are you sure you want to trash the selected 3 feed(s)?”, then sets the ticked feeds aside.
Close	Close the screen.

Important: **Submit** sends the feeds to the marketplace, partner, warehouse, email address, FTP site or end point immediately. Submitting a feed that was already processed sends it a second time.

14.4 Errors and payloads

Whenever a feed fails, Channels writes the reason to an error file in an **Errors** folder beside the feed and records it against the feed. **Errors** opens **Export Feed Errors**, listing each error by **Created** date and **File**; **View** opens the selected error.



Export Feed Errors

Channels that call an API can keep a copy of each request beside the feed. **Payload** lists these files; **View** opens one. Feeds sent to a REST end point also keep the request and the reply as **<feed number>_Request.txt** and **<feed number>_Response.txt**.

14.5 Resending, rolling back and trashing

You want to...	Do this
Send a feed again exactly as it was (for example the partner lost it)	Tick it and click Submit .
Fix the data and send the corrected documents	Correct the order, shipment or invoice in Sage, Roll Back the feed, then create a new feed from the list screen (or let the job do it).
Stop a feed being sent	Trash it.
Resend stock levels	Submit the feed again, or create a new full feed.
Resend product or customer data	Rolling back a product or customer data feed makes its records count as unsent, so they go in the next full or delta feed.

Some third-party warehouse feeds cannot be rolled back once later instructions depend on them, for example “Export feed '0000012345' cannot be rolled back: 3PL release 'R123' has 1 cancellation request(s) raised against it”, or when a later version of the same document has already been sent.

14.6 Where feed files are kept

Feed files are stored under the **Root folder**: set on **Settings** ► **General** (section 3.1), in a folder per channel and per day: **<Root folder>\<channel name>\Feeds\<yyyymmdd>\<feed number>.txt**. When a feed is sent by email or FTP the file is sent under the name the recipient expects (for example with a .csv, .xml or .json extension, or a fixed file name), and zipped when the recipient asks for it. Error files are in the **Errors** sub-folder of the day's folder.

Keep the root folder on a share that the Sage clients and the server running the scheduled jobs can all reach, and back it up – it holds the record of everything Channels has sent.

15. Job bags, automation, notifications and housekeeping

Most Channels work – downloading orders, converting them, sending acknowledgements, shipments and stock – is run automatically by **job bags**. A job bag is a named list of jobs that run one after another; each job runs one of a channel's automations, such as **Download new orders**. You can run a bag by hand from Sage, and you schedule it with Windows Task Scheduler, which runs it through the Channels automation program **Channels.exe**. This chapter also covers customer notifications and purging old Channels data.

15.1 Before you start

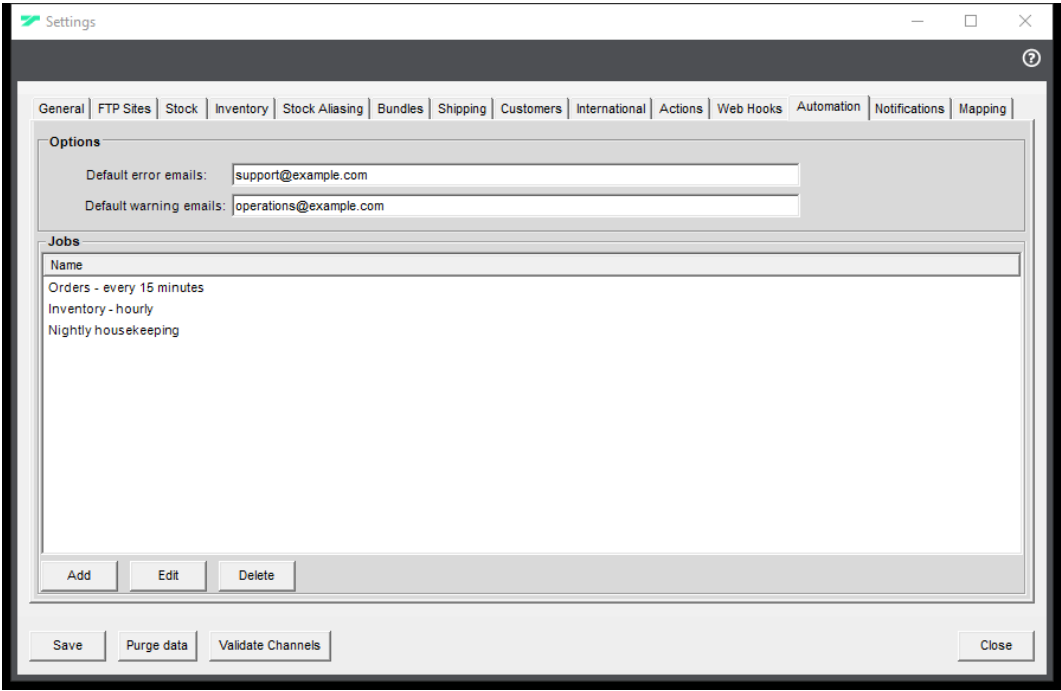
Scheduled job bags use the Tilted Sage 200 settings. In **Tilted Settings** ► **Options**, group **Automation & Logging**:

Field or button	What it does
Automation Folder:	A shared folder on the server that runs the scheduled tasks, entered as a network (UNC) path, for example <code>\\SAGESERVER\Sage Automation</code> . The Scheduled Task button creates the task on that server.
Logging Folder:	A shared folder for the job bag log files, also a UNC path. Scheduled job bags do not run without it.
Regenerate Automation	Copies the current program files into the automation folder's bin folder, which is where Channels.exe runs from. Run it after installing or updating Channels or Sage 200.
Purge Logs	Deletes old log folders.

Automation and logging folders must be UNC paths (“Automation and logging folders should be UNC paths”). Job bag emails, and notification emails, are sent through the email server in the **Emails** group of the same screen (SMTP, or **Use OAuth 2.0 (Microsoft 365)**).

Run scheduled tasks under a dedicated Windows domain user that is also a Sage 200 user: password set never to expire, granted “Log on as a batch job”, and logged in to Sage 200 once on the task server (and again after every Sage or Tilted upgrade). Give it a Sage role with access to the Channels features it runs.

15.2 Settings ▶ Automation



Settings – Automation tab

Field or button	What it does
Default error emails:	Who receives the email when a scheduled job bag logs errors, unless the bag has its own Error Emails :. Separate addresses with commas or semicolons. Saved with Settings.
Default warning emails:	Who receives the email when a scheduled job bag logs warnings, unless the bag has its own Warning Emails :.
Jobs list	Every job bag, by Name .
Add	Creates a job bag and opens the Job Bag window. Click Save there to keep it; Close discards a new bag that has not been saved.
Edit (or double-click)	Opens the selected job bag.
Delete	Deletes the selected job bag and its jobs after “Are you sure you want to remove '<name>'”.

15.3 The Job Bag window

Module	Function	Retries
Shopify Web Store	Download new orders	3
Shopify Web Store	Process orders	0
Shopify Web Store	Generate Tracking URLs	0
Shopify Web Store	Create shipment feeds	0
Shopify Web Store	Upload shipment feeds	2
eBay UK	Download new orders	3
eBay UK	Process orders	0

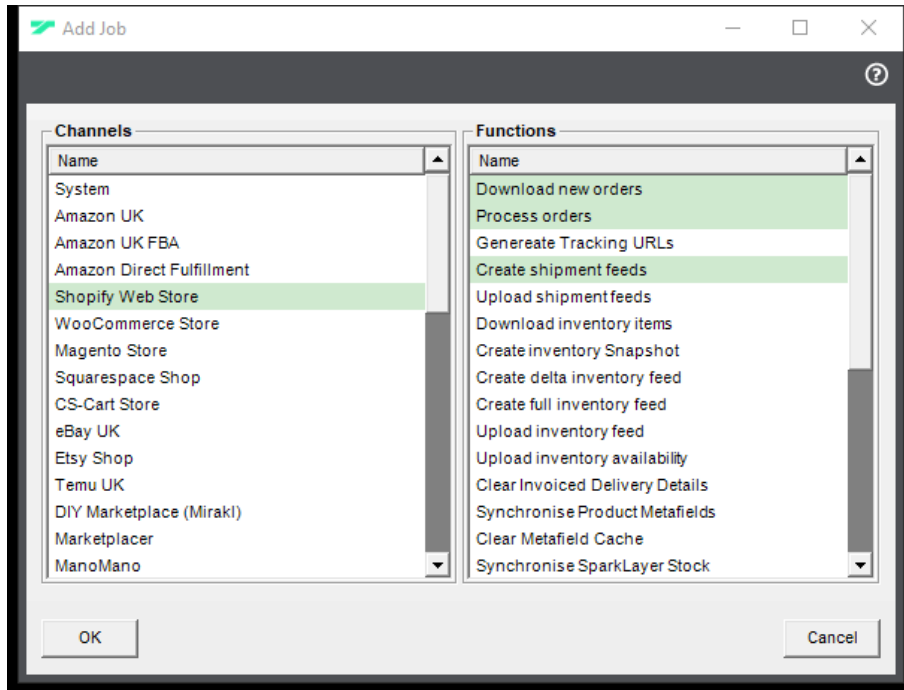
Job Bag

Field	What it does
Name:	The job bag's name. Required – “You need to provide a name”. The scheduled task runs the bag by this name.
Error Emails:	Recipients of this bag's errors email, instead of the default.
Warning Emails:	Recipients of this bag's warnings email, instead of the default.
Jobs list	Module (the channel, or System), Function (the automation) and Attempts (the attempts set in Options), in the order they run.

Button	What it does
Add	Opens Add Job to add one or more jobs (section 15.4).
Move Up / Move Down	Changes the running order. Click Save to keep the new order.
Delete	Removes the selected job.
Run	Saves the bag, then runs the selected job now (section 15.6).
Options (or double-click a job)	Retry settings for the selected job (section 15.5).
Save	Saves the bag and closes the window.
Scheduled Task	Saves the bag, then creates or opens its Windows scheduled task (section 15.7).
Run Bag	Saves the bag, then runs every job in it now, in order (section 15.6).
Close	Closes the window.

15.4 Adding jobs

In the **Add Job** window, the **Channels** list shows **System**, every channel, and **Notifications** once a notification set exists (section 15.10). Double-click a channel to list its automations under **Functions**, select one or more (hold Ctrl to select several) and click **OK** (“You need to select some functions” if none is selected). The jobs are added to the end of the bag.



Add Job

Automations

Each channel offers its own automations; the Channel Reference lists them for each channel. Most order channels offer the same core set:

Automation	What it does
Download new orders	Downloads new orders from the channel into its order list.
Process orders	Converts the stored orders into Sage sales orders (as Convert does on the order list).
Create acknowledgement feeds / Upload acknowledgement feeds	Builds and sends order acknowledgements, for channels that use them.
Generate Tracking URLs	Builds tracking links from the courier and tracking number (section 13.4).
Create shipment feeds / Upload shipment feeds	Builds and sends despatch confirmations with tracking.
Clear Invoiced Delivery Details	For data protection: removes the buyer's name, address, email and telephone number from the delivery address of this channel's completed, invoiced Sage orders once the period set on the channel's Shipments tab of Channel Options has passed (section 5.1). This cannot be undone.
Download inventory items	Refreshes the list of the channel's products used for stock feeds.
Create inventory Snapshot	Takes a new stock snapshot.
Create delta inventory feed / Create full inventory feed / Upload inventory feed	Builds the stock levels that have changed (delta) or all stock levels (full), and sends them.

System offers **Create inventory snapshot** and **Delta update inventory snapshot** (section 11.3).

Notifications offers **Create new notifications**, **Create notification feeds** and **Send notification feeds**

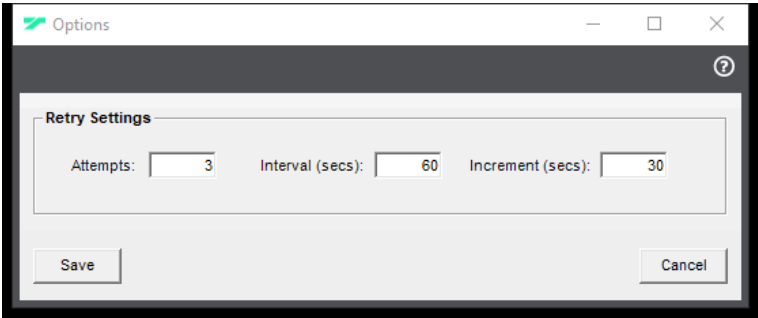
(section 15.10). Each “Create ... feeds” automation builds export feeds and each “Upload ...” automation sends them; see section 14 (Export feeds).

A typical order bag runs: Download new orders → Process orders → Create acknowledgement feeds → Upload acknowledgement feeds → Generate Tracking URLs → Create shipment feeds → Upload shipment feeds. A typical stock bag runs: Create inventory snapshot → Create delta inventory feed → Upload inventory feed for each channel.

A job for a disabled channel runs but does nothing, so you can switch a channel off without changing its job bags.

15.5 Retry options

Select a job and click **Options** to set what happens when it fails – useful for channels that are sometimes busy.



Options – retry settings

Field	What it does
Attempts:	How many times to try the job in total. 0 or 1 tries once.
Interval (secs):	How long to wait before the second attempt.
Increment (secs):	Added to the wait for each further attempt. With Interval 60 and Increment 30 the waits are 60, 90, 120 seconds...

Click **Save**. If the last attempt also fails, the error is logged and the bag carries on with the next job.

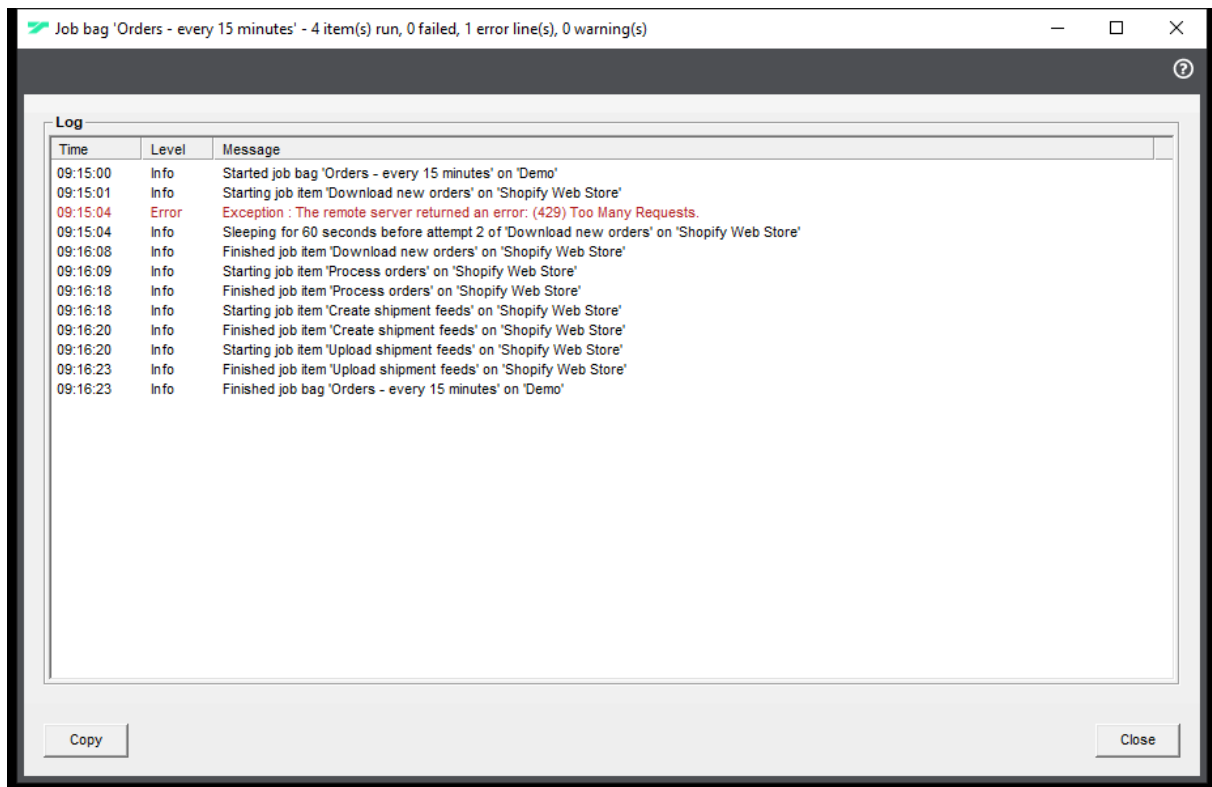
15.6 Running a job or bag now

Run (the selected job) and **Run Bag** (every job, in order) run the automations from your own Sage session, exactly as the scheduled task would. Channels asks first, in a **Run Now** box:

“Run job bag '<name>' (<n> item(s)) now, exactly as the scheduled task would? The automations run for real from THIS session - downloads, uploads and feeds happen exactly as they would from the scheduled task. Cancel takes effect between items.”

Important: Run and Run Bag download from and send to the channels for real.

A progress window shows which job is running; **Cancel** stops the run after the current job. The log appears live in a log window (**Time**, **Level**, **Message**; warnings in orange, errors in red; **Copy** copies the lines). When the run ends, the window title shows a summary such as “Job bag 'Orders' - 4 item(s) run, 0 failed, 0 error line(s), 0 warning(s)”. The run is also written to log files when a logging folder is set. Running from Sage does not send the error and warning emails – you see the log on screen instead.



Run Bag – the live log window

15.7 Scheduling a job bag

1. Make sure the **Automation Folder:** and **Logging Folder:** are set and **Regenerate Automation** has been run (section 15.1).
2. Open the job bag and click **Scheduled Task**. The bag is saved, and Channels creates a Windows scheduled task on the automation server, in the Task Scheduler folder **Sage 200 Channels ▶ <company name>**, named after the job bag.
3. The Windows task editor opens. Set the **Triggers** (for example every 15 minutes) and, on the **General** tab, the account to run as and **Run whether user is logged on or not**. Click **OK**.

If the task already exists, **Scheduled Task** opens it for you to change. You need permission to create scheduled tasks on the automation server.

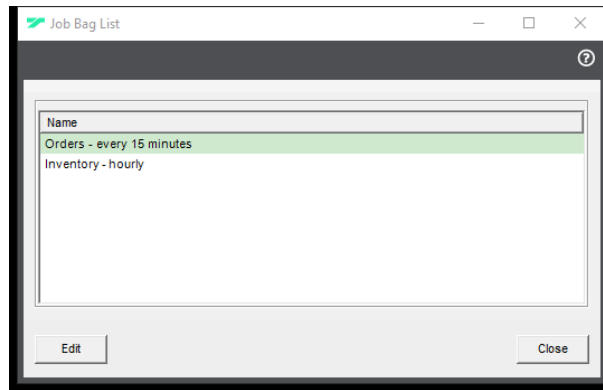
The task runs **Channels.exe** from the automation folder's **bin** folder with the Sage company name and the job bag name, for example:

```
\\SAGESERVER\Sage Automation\bin\channels.exe "Demo" "Orders - every 15 minutes"
```

Channels.exe logs in to Sage 200 as the Windows user the task runs as (no password is stored), opens the company and the job bag by name, runs each job in order, writes the log files, sends any error and warning emails and logs out. By default Windows does not start a second copy of a task while the first is still running.

15.8 A channel's job bags

On a channel's **Customisation** page (section 4.10), the **Jobs (n)** button opens the **Job Bag List** – the job bags that contain a job for this channel. **Edit** (or double-click) opens the bag; **Close** closes the list. Bags are created and deleted on **Settings ▶ Automation** (section 15.2).



Job Bag List for a channel

15.9 Log files and emails

Every run of a job bag – scheduled or from Sage – writes log files in the logging folder:

```
<Logging Folder>\<company>\Channels\<job bag>\<yyyyMMdd>\<HHmmss>_Full.log
```

- **_Full.log** – every line of the run.
- **_Errors.log** – only errors; created only when an error occurred.
- **_Warnings.log** – only warnings; created only when a warning occurred.

Each run starts with “Started job bag '<bag>' on '<company>'” and each job is logged from “Starting job item '<function>' on '<channel>'” to “Finished job item ...”. Failed attempts show “Exception : <message>” and, when retries are set, “Sleeping for <n> seconds before attempt <n> of ...”.

After a scheduled run:

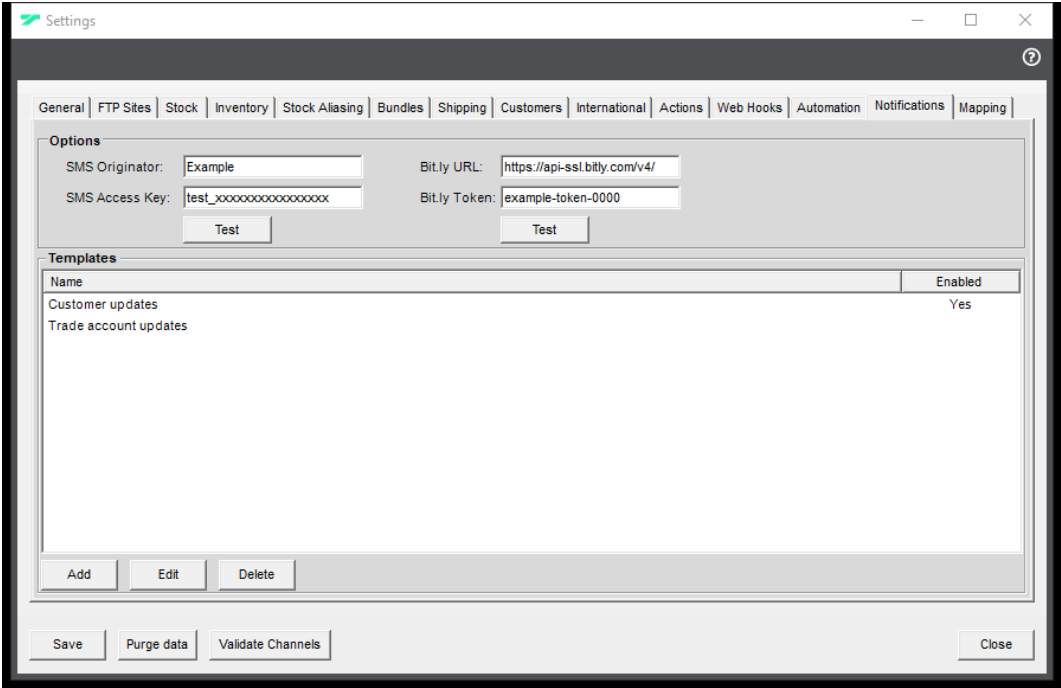
Email	Sent when	To	Subject
Errors	The run logged an error	The bag's Error Emails ; else Default error emails :	“Channels Automation : Errors processing job '<bag>'”
Warnings	The run logged a warning	The bag's Warning Emails ; else Default warning emails : (anyone who already received the errors email is left out)	“Channels Automation : Warnings processing job '<bag>'”

Both emails say “See attached log files.” and attach the run's log files. No email is sent when a run is clean.

When you convert orders by hand from an order list rather than in a job bag, the errors are shown in the **Log Entries** window instead. The window is shown in section 6.5.

15.10 Customer notifications

Notifications send your customers (or their contacts) emails and text messages as their orders progress – order received, back-ordered, in stock, despatched, invoiced and a satisfaction follow-up. A **notification set** watches the converted orders of the channels you choose and creates a notification when an order reaches each stage. Notifications are built into export feeds and sent by a job bag or from the **Export Feeds** screen.

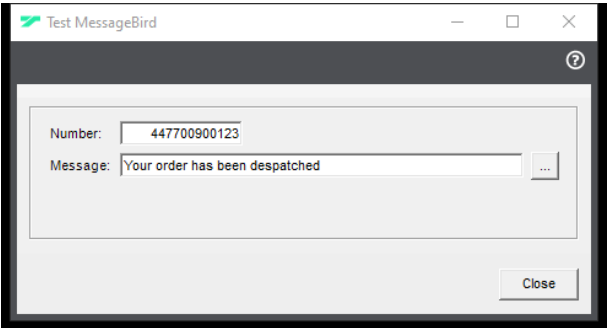


Settings – Notifications tab

Field or button	What it does
SMS Originator:	The sender name or number shown on text messages.
SMS Access Key:	Your MessageBird access key, used to send text messages.
Test (SMS)	Opens Test MessageBird to send a test text with the values on screen.
Bit.ly URL: / Bit.ly Token:	Your Bit.ly API address and token, used to shorten tracking links in notifications.
Test (Bit.ly)	Shortens a test link through Bit.ly and shows the result.
Templates list	The notification sets (Name , Enabled) with Add , Edit and Delete . Delete asks “Are you sure you want to delete the selected notification?” and removes the set with its templates and the notifications it has created.

The SMS and Bit.ly fields are saved with Settings.

Important: The Bit.ly **Test** button contacts Bit.ly straight away, and the ... button in **Test MessageBird** sends a real text message, charged to your SMS account, to the number you enter. Send test messages only to your own phone.



Test MessageBird

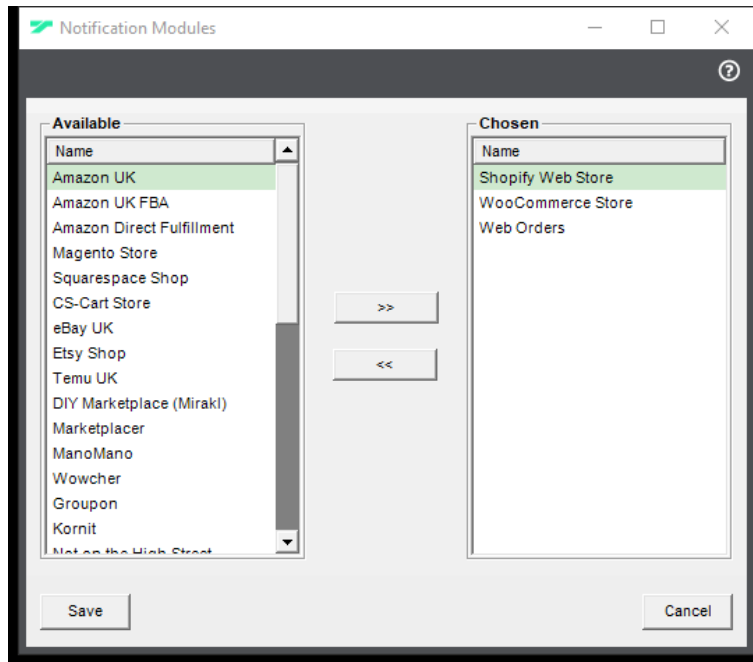
In **Test MessageBird**, enter the mobile **Number:** in international form without the + or the leading zero (the box starts with **44**, for example **447700900123**) and the **Message:**, then click ... to send. “Message sent” confirms it was accepted; “You need to provide a number” means the number is missing.

The Notification window (a notification set)

Notification

Field or button	What it does
Name:	Name of the set.
Enabled	Untick to stop the set. When you enable a set again, its start point moves to the latest order ("As this notification was previously disabled it's starting point is going to be reset to the last imported order. Only orders converted from this point will be included for notification processing.").
Acknowledgment, Unallocated, Allocation, Despatched, Invoiced, Satisfaction – Email and SMS columns	Tick which notification types this set sends, by email and by text. A template must also exist and be enabled for that type.
Min number of days after order create allocation notification:	An Allocation notification is sent only for orders that became fully allocated at least this many days after they were created – that is, back orders that have now arrived. Required when an Allocation box is ticked.
Number of days after invoice for satisfaction notification:	How long after the invoice the Satisfaction notification is sent.
Reset Start Point	Only orders converted from now on are included. Asks first and confirms "Starting point has been reset".
Modules	Opens Notification Modules : move channels from Available to Chosen with >> (or double-click) and back with <<, then click Save . Only the chosen channels' orders are included.
Emails / SMS	Opens the Email Template List or SMS Template List .
Save / Close	Save the set / close the window.

A new set starts from the latest converted order, so it does not notify customers about older orders.



Notification Modules

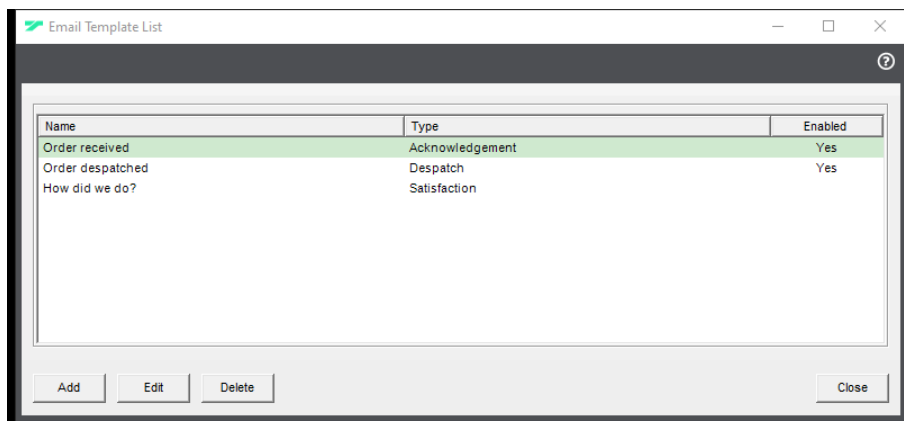
Notification types

Type	Sent when
Acknowledgement	As soon as the converted order is picked up.
Unallocated	Some stock lines are not fully allocated (the goods are on back order). Not sent if everything is allocated.
Allocation	Every stock line is allocated or despatched, and this happened at least the minimum number of days after the order was created.
Despatch	Every stock line has been despatched.
Invoice	Every stock line has been invoiced.
Satisfaction	The order is complete and its invoice is at least the set number of days old.

If a later notification for the same order has already been created (for example Despatch), an earlier one that has not been sent yet (for example Acknowledgement) is not sent, so customers never receive them out of order.

Email and SMS templates

The **Email Template List** and **SMS Template List** show the set's templates (**Name**, **Type**, **Enabled**) with **Add**, **Edit**, **Delete** and **Close**. Deleting a template asks “Are you sure you want to delete this template?” and also removes the notifications already created from it.



Email Template List

Email template

Field	What it does
Name: / Enabled	Template name; untick Enabled to stop using it.
Type:	Acknowledgement, Allocation, Despatch, Invoice, Satisfaction or Unallocated.
Subject:	Email subject; merge fields allowed (below).
Body:	The HTML file that holds the email body; ... browses for it. The file is read each time a notification is built, so you can update the wording without changing the template.
Images:	Pictures to include, for example your logo. Add picks a file; Remove removes the selected one after you confirm. Type the image's file name (for example logo.png) in the HTML where the picture should appear.
Send to retailer + Role:	Sends to the customer's contacts that have the chosen contact role (for email, the contacts marked as preferred for that role).
Send to delivery contact	Sends to the email address (or, for SMS, the telephone number) on the order's delivery address.
Testing + Recipient:	While ticked, every notification from this template goes only to the test recipient(s).
Exclude orders with empty analysis code + Analysis code:	Skips orders whose chosen sales order analysis code is blank – for example orders without marketing consent.

The **SMS Template** window has the same fields except **Subject:** and **Images:**; its **Body:** is the text of the message itself (up to 512 characters).

SMS Template

Name: ☒ Enabled

Type:

Body:

☐ Send to retailer Role:

☒ Send to delivery contact

☒ Testing Recipient:

☐ Exclude orders with empty analysis code

Analysis code:

SMS Template

Merge fields

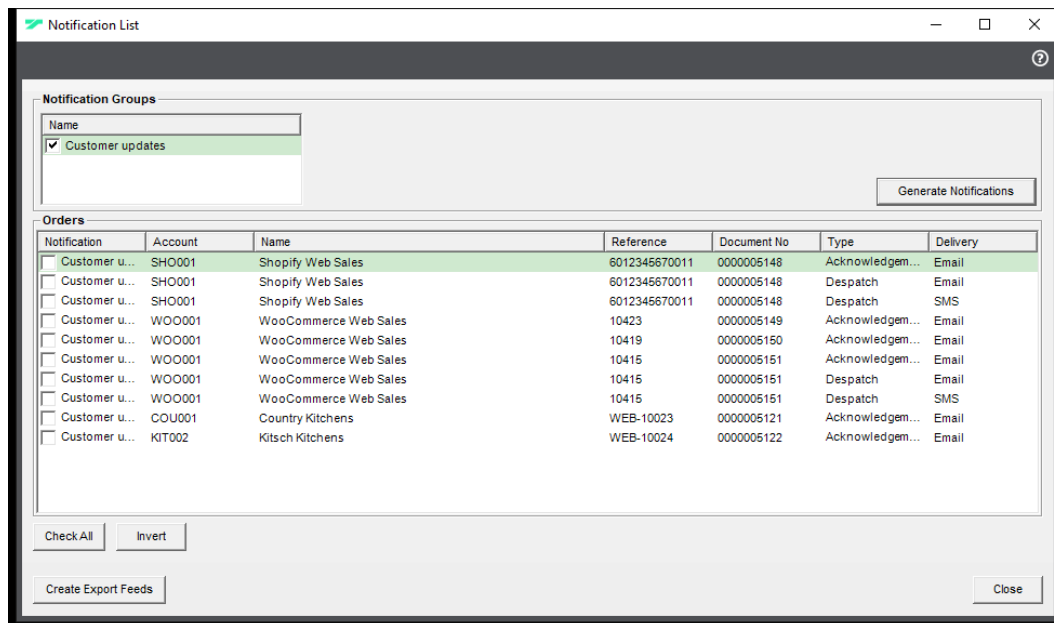
Use merge fields in the subject, the HTML body and the SMS text. They are written `[Table].[Field]`, with the exact Sage field name:

Merge field	Inserts
<code>[Order].[DocumentNo]</code> , <code>[Order].[CustomerDocumentNo]</code> , <code>[Order].[AnalysisCode3]</code> ...	Any field of the Sage sales order.
<code>[Order].[NextAvailableDate]</code>	When the outstanding goods are next expected (from the latest stock snapshot), or "not available".
<code>[Delivery].[PostalName]</code> , <code>[Delivery].[PostCode]</code> ...	Fields of the order's delivery address.
<code>[Customer].[CustomerAccountName]</code> ...	Fields of the customer account.

If you use the analysis code chosen as the **Tracking URL analysis code**: on **Settings ► General**, and it is still blank, Channels builds the courier tracking link from the courier and tracking number (section 5.7), shortens it with Bit.ly and inserts it.

The Notification List

Channels ► Notification List lets you generate and build notifications by hand. Job bags normally do this for you.



Notification List

Field or button	What it does
Notification Groups	The enabled notification sets; untick a set to leave it out.
Generate Notifications	Picks up newly converted orders for the ticked sets and creates any notifications that are now due.
Orders list	Notifications created but not yet built into a feed: Notification, Account, Name, Reference, Document No, Type, Delivery (Email or SMS).
Check All / Invert	Ticks all rows / reverses the ticks.
Create Export Feeds	Builds one export feed per ticked notification, with the merge fields filled in. Nothing is sent yet.
Close	Closes the screen.

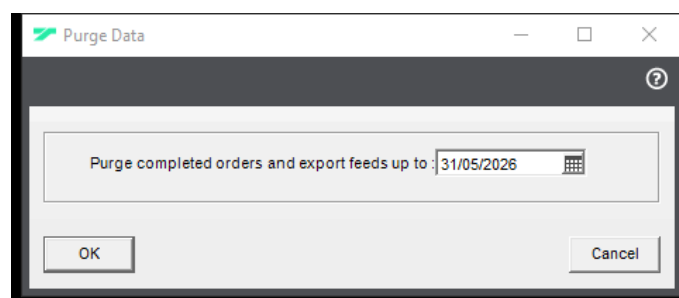
The feeds are sent by the **Send notification feeds** job or from **Channels ► Export Feeds** (section 14). Text messages go through MessageBird; emails go through the email server in **Tilted Settings ► Options**.

Automating notifications

Add the **Notifications** jobs to a job bag, in this order: **Create new notifications** (as **Generate Notifications**, for all enabled sets), **Create notification feeds** (as **Create Export Feeds**) and **Send notification feeds**.

15.11 Purging old data

Channels keeps a record of every converted order and every export feed. To keep the database tidy, click **Purge data** at the bottom of the **Channels ► Settings** window.



Purge Data

1. Check the date in **Purge completed orders and export feeds up to** :. It starts at the end of the month five months ago.

2. Click **OK** and answer **Yes** to “Are you sure?”. Channels shows its progress, and “Purge Complete” when it has finished.

The purge removes:

- the Channels records (lines, shipments, invoices, notifications and history) of orders whose Sage order is **Complete** and dated before the chosen date;
- the record of orders removed from the order lists before that date, with their remove reasons (section 6.10); and
- export feeds created before that date that are no longer waiting to be sent (feeds still linked to orders that are kept are left).

Sage sales orders and invoices are not touched, nor are stored orders waiting to be converted, nor the feed files on disk. If a purge stops part way, run it again to continue.

Important: Purged records cannot be restored. Take a backup of the company database first.

16. Changes to Sage 200 screens

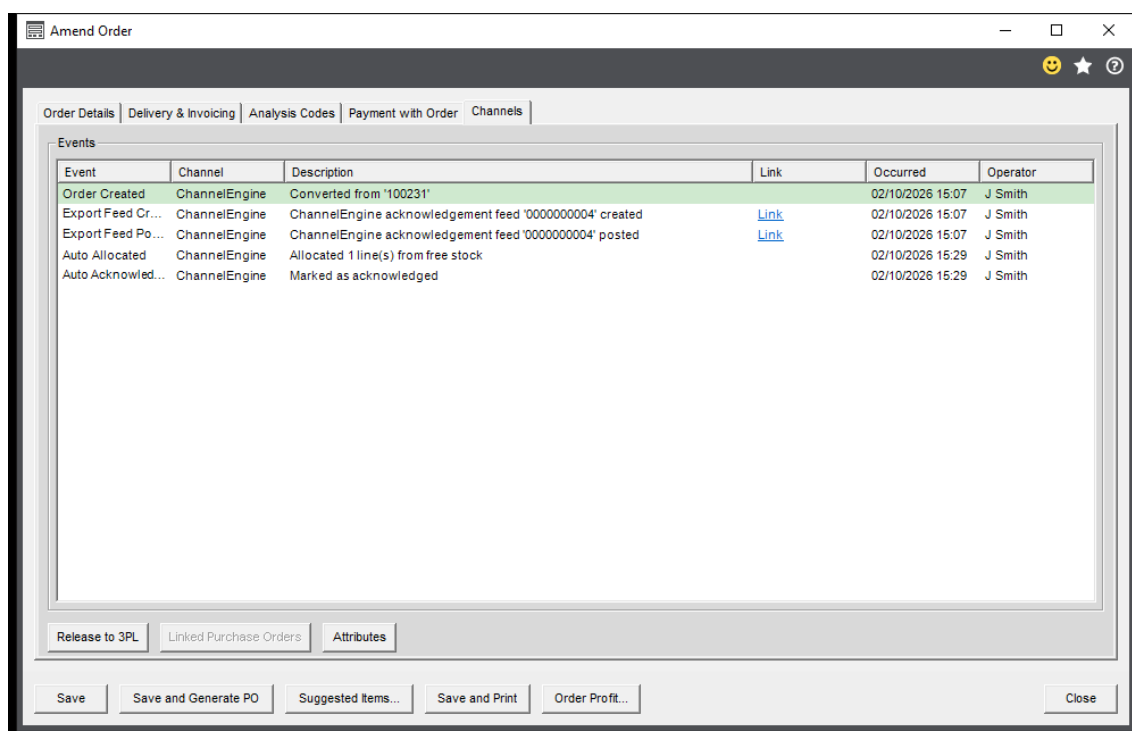
Channels adds a **Channels** tab, a few buttons and some extra columns to standard Sage 200 screens, so that you can see what a channel has done with a document without leaving Sage. These additions appear in the Sage 200 desktop, for companies licensed for Channels. The background work described in section 16.10 happens however a document is processed – in the desktop, through the Sage 200 API or in a scheduled job bag.

Sage screen	What Channels adds	Appears when
Sales orders, quotations and pro formas (enter, amend, view)	Channels tab with the event history and the Release to 3PL , Linked Purchase Orders and Attributes buttons; Add bundle button	Always; Release to 3PL on sales orders with the 3PL licence; Add bundle when Enable SOP Customisation is ticked
Sales returns (enter, amend, view)	Channels tab	Always
Sales order line window	Line discount check; Virtual Free column in the warehouse list and 3PL check	Always; the Virtual Free column and 3PL check with the 3PL licence
Despatch History	3PL Packaging button	3PL licence
Purchase orders and purchase returns (enter, amend, view)	Channels tab; Linked Sales Order button	Always; the button only on purchase orders raised for a drop-ship 3PL
Customer delivery addresses	Protection when deleting an address	Always
Customer account (amend)	Channels tab	Always
Stock item (enter, amend, view)	Channels tab	Always
View Item Balances	Virtual Warehouses panel	Always

If a Channels tab or button is missing, check that you are working in the Sage 200 desktop and that the company is licensed for Channels – and for 3PL where the table says so. The additions are made when the screen opens, so reopen the screen after a licence change.

16.1 Sales orders, quotations and pro formas

A **Channels** tab is added to **Enter New Order**, **Amend Order**, **View Order** and the matching quotation and pro forma screens. It shows the channel history of the document and gives you three buttons.



Amend sales order – the Channels tab

3PL Release

On sales orders (and sales returns), when the company has a 3PL channel, the **3PL Release** box at the top of the tab says where the document stands with the 3PL now – the state of its latest release (0000012345, 0000012345/2 ...):

- “... is held – waiting for ...” – not released yet, with the reason: **Manual Release**, amendments that need **Release to 3PL**, or the release analysis code, for example “waiting for 3PL Status = 'Ready' (now 'y)’”.
- “... was released 08/10/2026 10:15 by Chris and is waiting for the next order feed” – released, not yet sent.
- “... was sent on feed 0000124310 08/10/2026 10:20” – sent to the 3PL.

“Nothing has been released to a 3PL for this document.” means the document has no lines for a 3PL warehouse yet. The box is refreshed when the order is saved and after **Release to 3PL**.

Events

The **Events** list records everything Channels has done with the document.

Column	What it shows
Event	What happened – for example Order Created, Receipt Created, Receipt Allocated, Auto Allocated, Auto Despatched, Auto Invoiced, Export Feed Posted, 3PL Order Released, 3PL Release Held, 3PL Cancel Requested, 997 Accepted By Partner .
Channel	The channel the event belongs to.
Description	The detail, in plain words.
Link	Shows Link when there is something to open (see below).
Occurred	Date and time of the event.
Operator	The Sage user – or the automation user – that caused it.

Clicking **Link** opens:

- **Order Created, Order Changed and Return Created** – the order exactly as it was received from the channel, read-only.
- Export feed events – the file that was, or will be, sent to the channel.
- **Receipt Created, Receipt Allocated and Preorder Receipt Created** – the customer transaction enquiry for the receipt.
- **3PL Purchase Order Created and 3PL Purchase Order Cancelled** – the purchase order, in **View Purchase Order**.

Buttons on the Channels tab

Button	What it does
Release to 3PL	Releases the document to your 3PL warehouse – see below. On sales orders, with the 3PL licence; available once the document has been saved.
Linked Purchase Orders	Sales orders only. Opens the purchase orders raised for this order's lines with a drop-ship (supplier) 3PL. Available when there are such purchase orders.
Attributes	Opens the channel attributes of the order – see below.

Release to 3PL

Most releases to a 3PL warehouse happen automatically (see section 16.10). Use **Release to 3PL** when the 3PL channel has **Amendments require Release to 3PL button click** ticked and an amendment is waiting, when the order is on manual release, or to bring a manually entered order into Channels.

1. Save any changes to the order first – the button works from the saved order.
2. Open the **Channels** tab and click **Release to 3PL**.
3. If a release is being held, Channels names it and says why – for example “0000012345 is held - waiting for 3PL Status = 'Ready' (now "). Release it to the 3PL now?”. Click **Yes** to release it, **No** to leave it held.
4. Channels then says what the click did:
 - “Released 0000012345 for 3PL fulfilment. It will be sent with the next order feed.” – the release went now.
 - “0000012345 was released 08/10/2026 10:15 by Chris and is waiting for the next order feed. There is nothing more to release.” – it had already been released and has not been sent yet; nothing changed.
 - “Everything ordered has already been released to the 3PL. Further quantity is released automatically as it is added or allocated, and reductions raise cancellation requests.” – everything has been sent.
 - “No lines on this order are in a 3PL warehouse, so there is nothing to release.”
5. If the 3PL channel has **Restate orders** ticked, the message instead reads “Everything ordered has already been sent to the 3PL. Changes to the order are sent automatically, each time as the whole order with its current quantities.” and asks “Do you want to resend the current state of the order to the 3PL?”. **No** (the default) leaves things as they are; **Yes** releases a new send carrying the whole order exactly as it stands, and Channels confirms with “The current state of the order has been released to the 3PL”. The send waits for the next order feed, and saving the order again does not remove it; if you then change the order it carries the change instead.

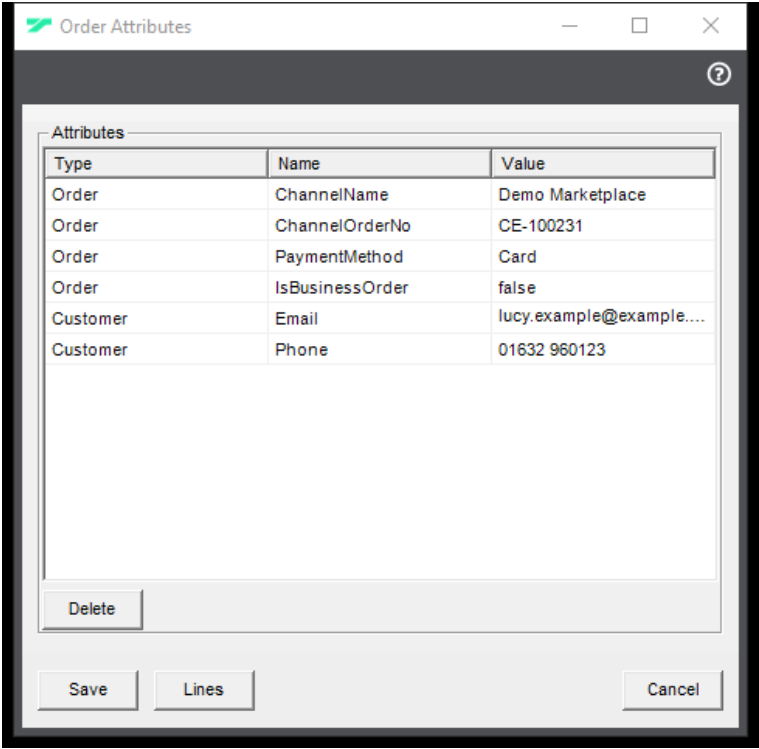
If the order did not come from a channel, Channels first records it against the Text File channel that has **Record manually entered orders / returns** ticked – unless the customer has **Disable recording of manual orders / returns** ticked on its Channels tab (section 16.7). If there is no such channel you see “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.”

Nothing is transmitted while you wait: the release is picked up by the 3PL channel's next export (section 14). The 3PL settings themselves are described in the Channel Reference, chapter 30.

Order attributes

Attributes are the extra values a channel sends with an order that have no place on the Sage order – for example a marketplace reference, a pre-order flag or an EDI party code (section 6.6). Channels keeps them with the order and uses them later, for example on shipment confirmations and EDI documents. Click **Attributes** on the Channels tab to see them.

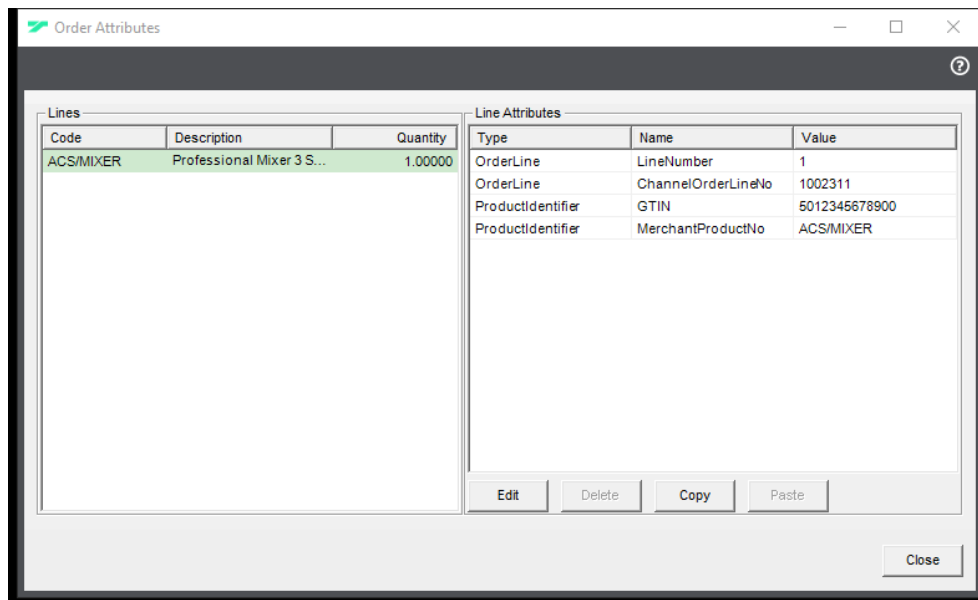


Order Attributes

Button	What it does
Save	Saves your changes to the Type , Name and Value of the attributes.
Delete	Removes the selected attribute.
Cancel	Closes the window.
Lines	Opens the attributes of the order lines.

Important: Change attributes only when you know how the channel uses them – a wrong value changes what Channels sends back to the channel or trading partner.

Lines opens a second window, **Order Line Attributes**, for the order's lines. Its **Lines** list shows the order lines (**Code**, **Description**, **Quantity**). Double-click a line to show its attributes under **Line Attributes**. Click **Edit** to change them and **Save** when you have finished; **Delete** and **Paste** are available while you are editing. **Copy** puts the line's attributes on the clipboard as comma-separated Type, Name, Value rows, so that you can **Paste** them onto another line or into a spreadsheet; **Close** closes the window.



Order line attributes

An order that did not come from a channel can be given line attributes only when a Text File channel has **Record manually entered orders / returns** ticked.

Adding a bundle

When **Enable SOP Customisation** is ticked on **Settings ► Bundles**, an **Add bundle** button appears with the line buttons on **Enter New Order**, **Amend Order** and the quotation and pro forma screens. It adds all the components of a bundle in one go – see section 9.3.

When you save a sales order

If you use SparkLayer, saving a sales order passes the change on: with **Use purchasing API rather than Shopify** ticked the order's purchase record is queued for SparkLayer; with **Live Shopify order updating** ticked the Shopify order is updated. See the Channel Reference, chapter 4 (Shopify and SparkLayer).

16.2 Sales returns

Enter New Return, **Amend Return** and **View Return** get the same **Channels** tab, with the **Events** list and the **Release to 3PL** and **Attributes** buttons (there is no **Linked Purchase Orders** button on a return).

When you save a return that has lines for a 3PL warehouse, Channels compares it with how it was when you opened it, records what changed in **Events** and prepares the updated return for the 3PL. It is sent with the 3PL channel's next export.

Release to 3PL on a return releases anything that is waiting. Channels replies with one of:

- “Successfully released return to the 3PL”
- “Everything on this return has already been sent to the 3PL. Amendments are sent when the return is saved.”
- “This return has no lines for a 3PL warehouse, or no 3PL channel sends sales returns.”

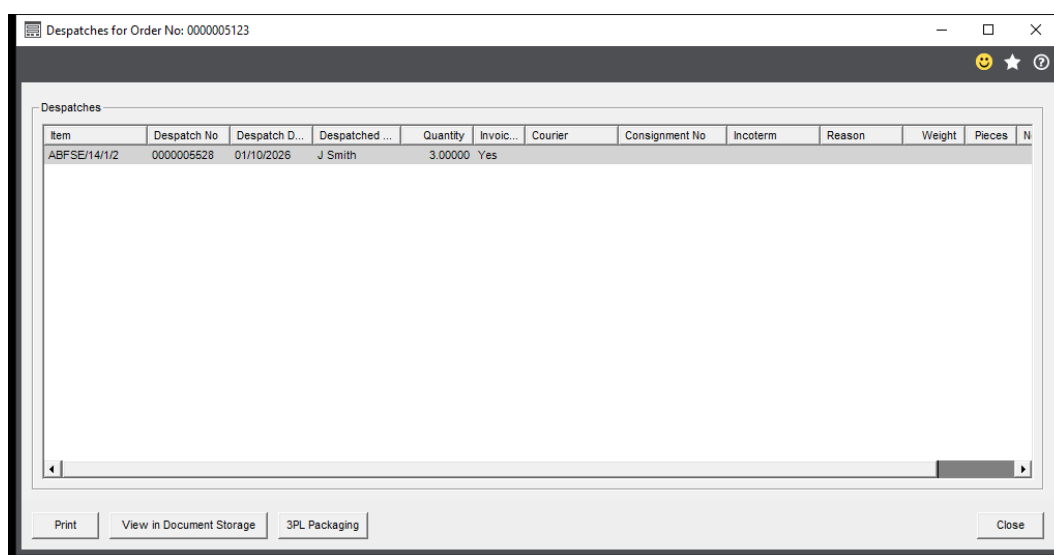
16.3 The sales order line window

The window in which you enter or amend a sales order line changes in three ways. The **Virtual Free** column and the 3PL check need the 3PL licence.

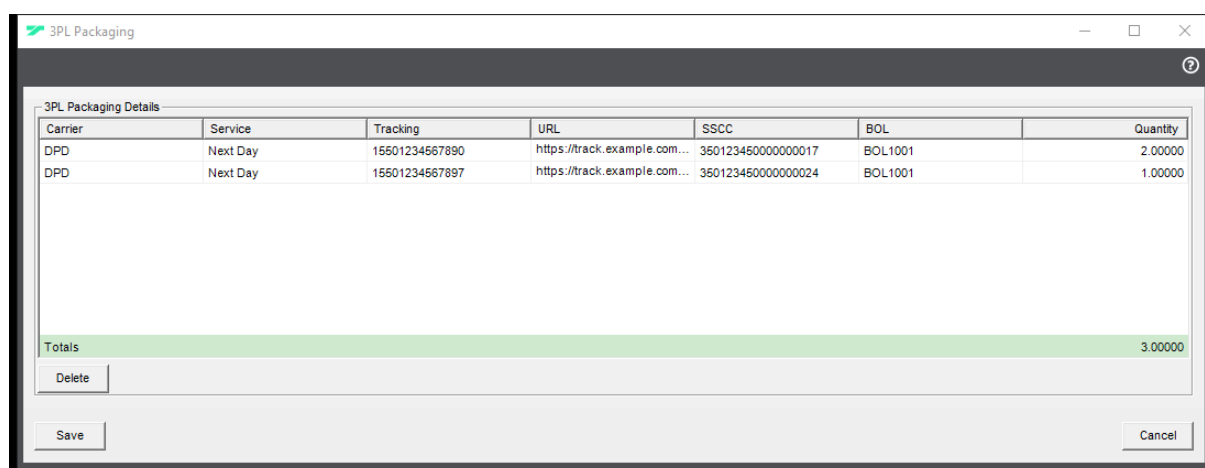
Change	What it does
Virtual Free column in the Warehouse list	Shows the free stock your drop-ship suppliers report for the item (their virtual warehouses – section 9.4) against the warehouse linked to each supplier. Other warehouses show zero.
Line discount	If the item has Exclude from SOP line discounts ticked on its Channels tab (section 16.8), the line's discount is removed when you leave the quantity and again when you save the line.
3PL check on save	When you save the line Channels checks that line again for 3PL: moving a line into the 3PL warehouse adds it to the order's unsent 3PL release, moving it out removes it.

16.4 Despatch History

Where the company is licensed for 3PL, **Despatch History** has a **3PL Packaging** button. It opens the cartons recorded for the selected despatch – usually reported by the 3PL, or entered by you – one row per carton and item.



Despatch History with the 3PL Packaging button



3PL Packaging

The **3PL Packaging** window has these columns:

Column	What it shows
Carrier	The carrier (for EDI partners, the carrier's SCAC code).
Service	The carrier service.
Tracking	The carton's tracking number.

Column	What it shows
URL	The tracking web address.
SSCC	The carton's 18-digit serial shipping container code – rows with the same SSCC are one carton.
BOL	The bill of lading number.
Quantity	How many of the item are in the carton. The totals row shows the quantity across all cartons.

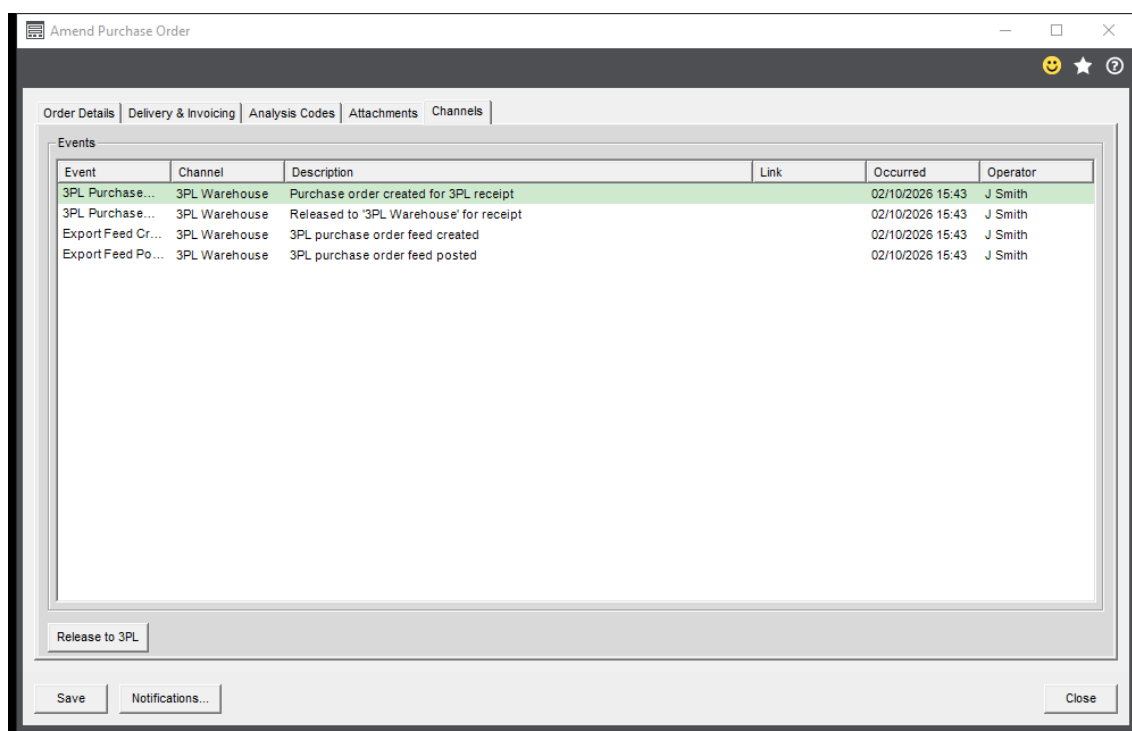
1. In **Despatch History**, select the despatch line.
2. Click **3PL Packaging**.
3. Add or correct the rows. **Delete** removes the selected row.
4. Click **Save**, or **Cancel** to close without saving.

EDI advance shipping notices use these cartons when there is no Carriers consignment for the despatch.

Where the Carriers add-on is installed, Carriers keeps the cartons and you view them with its **Cartons** button. **3PL Packaging** is then available only for older despatches that have 3PL packaging details but no Carriers record.

16.5 Purchase orders and purchase returns

Enter New Order, **Amend Order** and **View Order** in Purchase Order Processing, and the purchase return screens, get a **Channels** tab with an **Events** list (the same columns as on a sales order) and a **Release to 3PL** button.



Amend purchase order – the Channels tab

Button	What it does
Release to 3PL	On the Channels tab. Releases whatever is waiting for the 3PL warehouse – a held send, or the first send of a purchase order on manual release. Available once the document has been saved.
Linked Sales Order	With the form's own buttons, on purchase orders raised by Channels for a drop-ship (supplier) 3PL. Opens the sales order the purchase order was raised for.

When you save a purchase order or return that has lines for a 3PL warehouse, Channels compares it with how it was when you opened it, records the changes in **Events** and prepares the update for the 3PL; it is sent with the 3PL channel's next export. **Release to 3PL** replies with “Successfully released purchase order for the 3PL”, “Everything on this purchase order has already been released to the 3PL. Amendments are released as they are saved, or from this button when amendments require it.” or “This purchase order has no lines for a 3PL warehouse, or no 3PL channel sends purchase orders.” (the same messages say purchase return on a return).

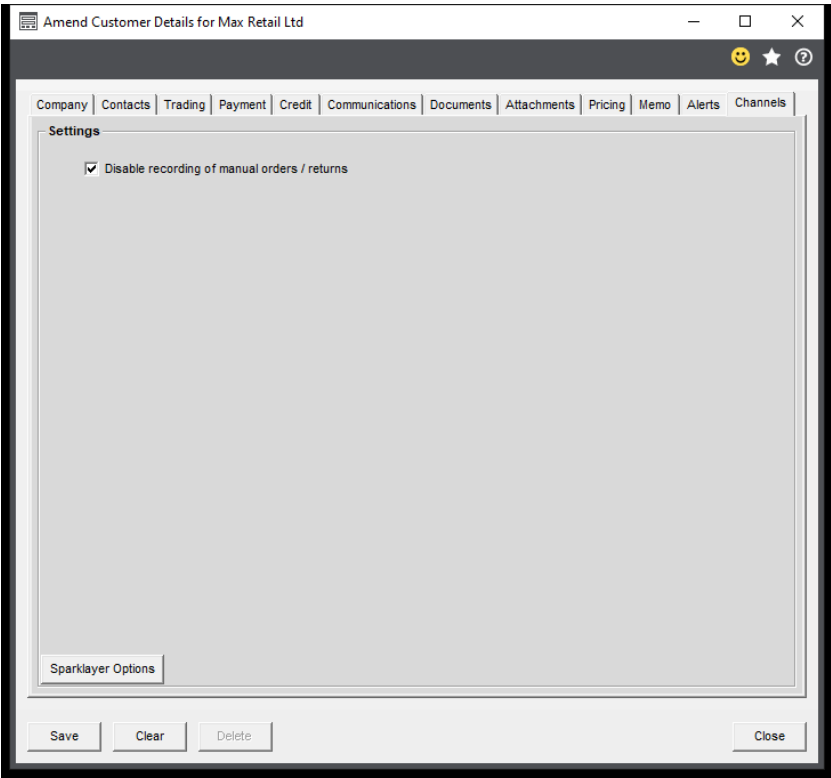
16.6 Customer delivery addresses

Nothing changes on the screen, but deleting a delivery address is checked first:

- If the address is used by an EDI customer location, the delete is stopped with “The selected delivery address is linked to a Channels EDI Customer Location. You will need to delete the entry from there first.” Remove the location first (Channel Reference, chapter 28).
- If the address is linked to a SparkLayer account, the link is removed with the address.

16.7 Customer accounts

The customer account screen (**Amend Customer Account Details**) has a **Channels** tab with a **Settings** group.



Customer account – the Channels tab

Field or button	What it does
Disable recording of manual orders / returns	Tick to keep this customer's manually entered orders and returns out of Channels: they are not recorded against the Text File channel that records manual orders, and so are not released to a 3PL automatically.
Sparklayer Options	Opens the SparkLayer settings for this customer (Channel Reference, chapter 4). Available when a SparkLayer site is set up.

Important: Sparklayer Options contacts Shopify and SparkLayer as soon as it opens, to show the customer's current details there.

When you save the customer, Channels also runs any outgoing web hooks set up for customer changes (section 8.2).

16.8 Stock items

Enter New Item, **Amend Item Details** and **View Item Details** have a **Channels** tab. On **View Item Details** the settings are shown but cannot be changed. Changes are saved when you save the item.

The tab has its own tabs down the left: **General**, **Very** and **Woocommerce**.

Stock item – the Channels tab, General

General holds the **Settings** group and the **Aliases** and **Bundles** lists.

Field	What it does
Default 3rd party logistics option:	For drop-ship (supplier) 3PLs. Include – lines for the item go to the 3PL supplier whenever the item is supplied by them. Exclude – lines go only for the warehouses and suppliers listed under Included Warehouses .
Included Warehouses	Link, available when the option is Exclude . Opens the list of warehouse and supplier pairs for which the item is still sent; the number in brackets is how many there are.
Virtual warehouse total free stock:	Read-only. The free stock reported for the item by all drop-ship suppliers (section 9.4).
Overriding inventory buffer:	A buffer for this item that replaces the system-wide and channel inventory buffers when stock levels are sent to channels (section 11.1).
Exclude from SOP line discounts	Tick so that sales order lines for the item never carry a line discount – on orders downloaded from channels and on lines you enter yourself.

List	What it shows
Aliases	The item's alternative codes (Group , Alias – section 9.1). Edit opens the alias; Delete asks “Are you sure” and removes it.

List	What it shows
Bundles	The bundles the item belongs to (section 9.2): the bundle group and whether it is enabled (Group Enabled), the bundle, the item's Quantity and Percent of the bundle price, and whether the bundle is enabled (Bundle Enabled). Edit opens the bundle.

Very lets one item use its own lead days in place of the Very channel's (Channel Reference, chapter 24). Leave a field at 0 to use the channel's value. The fields are available when you have a Very channel. To set many items at once from a csv file, use **Import Stock Item Lead Days** on the Very channel's **Connection** page (Channel Reference, section 24.6).

The screenshot shows a web application window titled 'Amend Stock Item Details'. At the top, there's a 'Stock Item' section with a dropdown for 'Code' (showing 'ACS/TOASTER') and a text field for 'Name' (showing 'Polished Steel 4 Slice Toaster'). Below this is a horizontal menu with tabs: 'Details', 'Manufacturing', 'Analysis', 'Suppliers', 'Alternatives', 'Cross-selling', 'Locations', 'Attachments', 'Memo', 'Comments', 'Alerts', 'Search Categories', and 'Channels'. The 'Channels' tab is active. On the left, under 'General', there's a list of channels: 'Very' (selected) and 'Woocommerce'. The main area shows the 'Very' channel settings. It has two input fields: 'Lead days' with the value '5' and 'OOS max lead days' with the value '30'. To the right of these fields is a note: 'Zero uses the value from the Very channel settings.' At the bottom of the window, there are buttons for 'Save', 'Selling Prices', and 'Close'.

Stock item – the Channels tab, Very

Field	What it does
Lead days:	The lead time sent to Very for this item when it is in stock, and added to its pre-order lead time. Replaces the channel's Lead days .
OOS max lead days:	The longest wait, in days, for which this item is still offered as a pre-order when it is out of stock. Replaces the channel's OOS max lead days . Used only when the channel has Allow pre-orders ticked.

Woocommerce (Manage stock, Allow back orders when item out of stock and Manage stock back orders option) sets the item's stock options on your WooCommerce store. It is available when you have a WooCommerce channel that does not have **Upload inventory figures rather than in / out of stock** ticked. **Manage stock back orders option** can be changed only while **Manage stock** is ticked.

16.9 View Item Balances

View Item Balances gains a **Virtual Warehouses** panel at the bottom: one row per drop-ship supplier feed that reports stock for the item (**Virtual Warehouse Name**, **Free Stock**), with a total. To make room, the Sage trading quantities and warehouse balances are placed at the top of the screen.

View Stock Item Balances

Stock Item
Code: ACS/TOASTER Name: Polished Steel 4 Slice Toaster

Trading Quantities
Sold this period: 1310.00000 Bought this period: 1332.00000
Sold last period: 20.00000 Bought last period: 0.00000
Direct delivery on order: 0.00000

Warehouse Balances

Name	Quantity on Order	Quantity in Stock	Quantity Allocated	Free Stock
SHOWROOM	0.00000	1.00000	0.00000	1.00000
WAREHOUSE	10.00000	94.00000	29.00000	65.00000
Total	10.00000	95.00000	29.00000	66.00000

No Bins

Name	Last Stocktake	Quantity in Stock	Quantity Allocated	Free Stock
Unspecified		1.00000	0.00000	1.00000
Total		1.00000	0.00000	1.00000

Virtual Warehouses

Virtual Warehouse Name	Free Stock
Supplier A Drop-ship	36.00000
Totals	36.00000

View Item History... View Item Details... Close

View Item Balances – Virtual Warehouses

16.10 What happens automatically in the background

Channels also acts when documents change in Sage, without any button being pressed. You see the results in the **Events** list of the document.

When	What Channels does
A manually entered sales order or return is saved for the first time	Records it against the Text File channel that has Record manually entered orders / returns ticked (unless the customer has opted out – section 16.7). For an order, it then checks the lines for 3PL and releases them according to the 3PL channel's settings. Orders raised by Channels are already recorded.
The allocation of a sales order line changes	For 3PL channels with Use warehouse allocations for fulfilment requests ticked, allocated quantity is released to the 3PL and a reduction is withdrawn or becomes a cancellation request.
A sales order line is deleted	Unsent 3PL quantity is withdrawn; quantity already sent becomes a cancellation request. If the line was sent to a drop-ship supplier on a purchase order, you are warned "This line is linked to purchase order '...' and has been sent to the supplier ..." – contact the supplier to cancel.
A sales order is cancelled	Cancellation requests are raised for anything already sent to a 3PL. With SparkLayer, the purchase is cancelled or the Shopify order updated.
A sales return, purchase order or purchase return held for a 3PL is cancelled	Anything waiting to be sent is withdrawn and an event is recorded. Nothing is sent to the 3PL.
A sales invoice is posted	If the order came with a payment from the channel and Auto allocate receipts to posted invoices is ticked (section 3.1), the receipt is allocated to the invoice (Receipt Allocated). For a Shopify pre-order (Enable Pre-order Processing on the Shopify channel) the order's payment is receipted into the channel's Liability Cash Book: (Preorder Receipt Created – Channel Reference , section 4.5). Outgoing web hooks for posted invoices run (section 8.2).
Carriers confirms delivery	The delivery date and proof of delivery are recorded on the order so the channel's delivery feed can report them (section 13.6).
A channel asks to cancel an order	Channels agrees unless the order has gone too far, replying "Sales order is complete", "Sales order is at least partially despatched" or "At least one item has been despatched" (section 6.13).
A receipt for a Shopify or ChannelAdvisor order is refunded in Tilted Retail	A refund window opens so that the refund is also made on the channel.

When	What Channels does
An EDI advance shipping notice is built	Cartons are taken from the Carriers consignment, otherwise from 3PL Packaging (section 16.4), otherwise the despatch is sent as a single carton.
An order is archived with Tilted Archiving	Channels' records and events for the order are removed with it.
A stock item is deleted	The item's Channels settings, aliases and stock snapshot entries are removed.
Sage 200 starts	Channels brings its own records up to date after an upgrade. No action is needed.

17. Recommended practice

A short checklist drawn from the chapters above.

- **Set up one channel at a time** and follow it from download to shipment confirmation with a handful of orders before adding it to a scheduled job bag (section 2.5).
- **Check the mappings before the first conversion** – customers, items (aliases and bundles), carriage, VAT and warehouses decide what the Sage order looks like (sections 5, 6.6 and 9).
- **Let job bags do the routine work** and use the screens for exceptions: orders in error, feeds that failed, shipments waiting for tracking.
- **Watch the export feeds (Channels ► Export Feeds, section 14)** – a feed in error means a channel has not received stock, a shipment or an acknowledgement.
- **Run job bags as a dedicated Windows user** that has logged in to Sage 200 on the server at least once (section 15.1 and the Tilted Sage 200 guide), and read the log files after the first runs (section 15.9).
- **Keep test and live apart** – use separate channels (or a test company) for sandbox accounts so test orders never reach live stock or live customers.
- **Purge old data** occasionally (section 15.11), after a backup.

18. Troubleshooting

Messages you may see, by area. Channel-specific messages are listed at the end of the Channel Reference.

Settings, channels and mappings

Message or symptom	What it means / what to do
"Feature 'Channels' is not licensed" (title Tilted Sage 200 Licensing) and the screen closes	Your Tilted licence does not include Channels. Ask your Sage business partner to update the licence; it is refreshed when Sage 200 starts.
"Invalid Tilted Sage 200 Customisations License"	The licence is missing or belongs to a different Sage 200 account. Ask your Sage business partner to re-issue it.
"Tilted Sage 200 Customisations License Expired"	The licence has expired. Contact your Sage business partner.
"Tilted Sage 200 customisations license expires in n days"	Reminder in the last 30 days before expiry. Contact your Sage business partner before the date.
"Feature 'ThirdPartyLogistics' is not licensed" when choosing Third Party Logistics in the wizard	The Third Party Logistics licence element is needed for 3PL channels.
"You cannot enable this channel as you've already enabled 5 of 5 licensed"	Same limit, when ticking Enabled in the wizard. Clear Enabled or disable another channel.
Channels menu items missing for a user	Their role does not have the feature. Tick it under Channels in System Administration (section 2.4).
"You need to select a channel to continue"	Select a channel type on the Choose Channel page before Next .

Message or symptom	What it means / what to do
"Seems to be a problem loading module 'X', probably need to delete it and start again"	The channel's settings cannot be loaded (for example after an incomplete set-up). Open it from the Channel List; if it will not open, contact Tilted support before deleting it.
"Validation complete."	Validate Channels finished; any problem channels were reported before this message.
"You need to select a duties nominal code" / "You need to select a duties tax code"	Order duties enabled is ticked on Settings ► International; choose both or clear the box.
"You need to choose a customer account if you're going to use a default"	Use existing account when no match is ticked without an Account .
"You need to setup the prefix/next number when choosing to automatically create a customer account"	Enter a Prefix and Next Number , or set Sage 200 to generate customer references.
"You need to choose an option for the scenario where there's no email match"	With Find customer using email address... ticked, choose either Automatically generate customer reference or Use existing account .
"The field 'X' is included more than once"	Two rows on Settings ► Mapping have the same name; rename or clear one.
"At least one of the fields you're deleting is mapping in an existing module, are you sure you want to delete these?"	You cleared a master field that channels map. Yes removes it from those channels too.
"You need to choose your courier analysis code first"	Choose Courier analysis code on Settings ► General before Couriers Tracking URLs .
"Note : Custom assemblies should be on a network share"	You chose a custom assembly on a local drive; move it to a share every workstation and the automation server can reach.
"Connection test failed : ... Send this to a file?"	The FTP test could not connect or list. Check the URL, port, Secure/FTPS/Passive settings, login and folder with the partner; Yes saves the reason for your IT team.
"Upload test failed : ..."	The test upload was refused – usually folder permissions or the outgoing folder name.
"You need to select an ftp connection"	FTP Enabled is ticked on the wizard's FTP page without a Connection .
FTP Enabled greyed on the wizard's FTP page	No FTP site exists yet – add one on Settings ► FTP Sites.
"You need to select a key field"	Choose the column that identifies each document on the file template page.
"The key field 'X' is not in the new template. Choose a key field before leaving this page."	The new template has no column of that name – pick the new key column.
"You need to enter a delimiter" / "You need to select the encoding" / "You need to enter a password"	Complete the file format options for the chosen format.
"The end point URL needs to be a full http:// or https:// address"	Enter the whole address including https://.
"An Excel workbook cannot be posted to an end point - choose CSV, XML or JSON"	Change the file format or switch the end point off.
"The request body does not use [FILE_BASE64] or [FILE], so the feed file would never be sent ..."	Put [FILE] or [FILE_BASE64] in the request body, or clear it to send the file as the body.
"You need to provide a nominal code for the free text line discount"	Order level discount creates negative free text line is ticked – choose the Nominal code .
"You need to provide a nominal account" (Balancing Invoice / Credit Options)	Specify nominal account is ticked without an account.
"Country code 'X' does not exist" / "Tax code 'n' does not exist" (Country Tax Codes)	Correct the row – use Sage country codes and tax code numbers.
"The 3PL's shipping methods could not be listed, so type the method key instead (...)"	The warehouse could not be reached when opening Couriers for a 3PL connected by API; type the shipping method codes.
A new field from Settings ► Mapping is missing from a channel's Field Mapping	Click Refresh in that channel's Field Mapping.

Orders, customers and web hooks

Message or symptom	What it means / what to do
A row on the order list is pale red	The order failed the last time it was converted (by you or a job bag). Hover over it for the reason, fix the cause, then tick it and click Convert .
A row on the order list is dark red	The order failed when you converted it just now. Hover over it, or read the Log Entries window.
A row has no tick box and shows a SOP Order number	The order is already in Sage 200 (the channel sent it again). Remove it from the list with a reason.
An order change has no tick box	The original order has not been converted yet. Convert the original order first.
An order is still on the list but the job bag no longer converts it	The job bag tried it the maximum number of times (three by default). Fix the cause and convert it from the list.
"Maximum of 2000 checked"	You can tick up to 2,000 rows at a time. Convert those, then tick the rest.
"You need to select some orders to remove"	Tick the orders before clicking Remove .
"You need to enter a reason for removal."	Type a reason in the Remove Reason window.
"Order has been processed and cannot be amended"	The order was converted (or removed) since the list was loaded. Click Find to refresh the list.
"You need to choose a template module"	In Import File , choose the Channel : the files belong to.
"Nothing was saved: ..." (Edit Order)	One or more cells you changed is not valid – the message names the line and column. Correct it (dates as yyyy-MM-dd HH:mm:ss) and click Save again.
"The text is not a valid serialised order"	The text in Edit Raw can no longer be read. Undo your change or click Cancel .
"Customer account number is empty"	The order has no customer account and no customer automation is set up. Map Customer Account Number , or set up the customer options on the Customers tab of Settings or in the channel's options.
"Failed to locate customer from reference '...'"	The mapped account does not exist in Sage 200. Create the account, or correct the mapping or value mapping.
"Failed to locate default warehouse from name '...'"	The mapped Default Warehouse is not the name of a Sage warehouse. Correct the mapping.
"Mapped country code '...' does not appear to be valid"	The delivery country code is not a Sage country code. Add a value mapping for it, or correct the order with Edit .
"Failed to locate defined customer delivery address"	The delivery address the channel picked no longer exists on the customer. Check the customer's delivery addresses.
"Looks like there's an issue with the mapping as there are ... line values but the order has ... lines, perhaps the SKU value is empty"	A line could not be mapped – usually the item code is missing. Check the line mappings and the order.
"The quantity doesn't appear to be a number"	The line quantity mapping is wrong or the channel sent an invalid value.
"Failed to locate stock / warehouse item using '...'"	No Sage item (or stock alias) matches the channel's SKU in the warehouses ticked on the Inventory tab of Settings. Add the item, or an alias in an alias group linked to the customer or channel (section 9.1), or tick Missing SKU creates free text line on the channel.
"Stock item '...' is inactive"	The code (or its alias) points to an inactive Sage stock item. Make the item active, or correct the SKU or the alias.
"Failed to locate warehouse from '...'"	The mapped line Warehouse is not a Sage warehouse name.
"Failed to locate warehouse item from '...' and '...' / "Failed to locate warehouse item for '...' using warehouse switching"	The item is not set up in the warehouse (or in any of your Inventory warehouses). Add the item to the warehouse, or allow warehouse switching on the channel.
"Failed to locate a direct delivery warehouse"	A direct-to-customer item needs a direct-delivery warehouse in Sage 200.
"Supplied bin '...' does not exist in warehouse '...' for stock item '...'"	The mapped Bin is not a bin for that item.

Message or symptom	What it means / what to do
"Invalid tax code '...'"	The tax code sent (after any tax-code value mapping) is not a Sage tax code number.
"Failed to locate unit ..." / "Unit ... does not exist on stock item ..."	Set up the unit on the item, or add a unit value mapping on the channel.
"The unit price mapping appears to be incorrect and Sage has not provided a unit price"	No price was sent and Sage has no price for the customer and item. Map Unit Price or add a price-book price.
"Invalid Nominal Specification"	The mapped nominal account, cost centre or department does not exist.
"Bundle '...' found with no items"	The bundle exists but has no component items. Complete the bundle (section 9.2).
"Order level discount value of '...' does not appear to be numeric"	The order discount mapping is wrong.
"Exception creating shipment line : ..." / "Failed to locate shipping additional charge or stock item using code '...'"	The carriage line could not be added – usually the shipping method is not a Sage additional charge or stock code. Check the Shipping tab of Settings and the shipping method mapping.
"Tax code not defined for shipping line and order contains no lines so unable to default to the tax code applied on the first line"	Map Shipping Tax Code , or check why the order has no lines.
"Failed to map bank account using '...' for '...'"	The payment method has bank-account value mappings, but none for this currency. Add one.
"Failed to locate payment method from '...'"	The payment method is not a Sage payment method name. Add a value mapping or the payment method.
"Payment value ... is greater than order value ..."	The channel's payment is more than the Sage order total – usually a price, VAT or carriage mapping difference.
"Order '...' for '...' appears to be a duplicate. Are you sure you want to continue"	The customer already has a live order with this order number. Yes creates it anyway; No leaves it on the list.
"Duplicate order '...' not processed"	You answered No to the duplicate question. Remove the order if it is a genuine duplicate.
"Blocked order '...' for '...' when processing as an order with the same reference already exists for that customer"	A job bag found a duplicate and did not create it. Tick Allow duplicate order numbers on the channel if repeats are genuine.
"Order '...' will need to be manually cancelled, Cancel exception '...' after Create exception '...'"	The order failed and the half-made Sage order could not be cancelled; it has been put on hold. Cancel it in Sage, fix the cause and convert again.
"Failed to locate order using '...' for modify"	An order change arrived for an order that is not in Sage for that customer. Convert the original order first.
Complete Skipped event on the order	Completion was asked for but the order was on hold or not fully allocated, so it was not despatched or invoiced. Release or allocate it and complete it in Sage.
"You need to select some orders"	Tick orders on the Converted, Delivered or Delivery Booked list before Create Feed .
"... feeds raised errors whilst processing, check Export Feeds / Errors to resolve."	Some feeds failed. Open Channels ► Export Feeds , tick Processed with errors and click Errors on the feed (section 14).
Cancellation rejected: "Sales order is at least partially despatched" / "At least one item has been despatched" / "Sales order is complete"	The goods have gone (or the order is already complete); the channel is told the request is rejected. Arrange a return instead.
"Do you want to create outgoing web hook feeds for the ... accounts discovered?"	Check the count before answering Yes – a message is sent for every account.
"Failed to locate any customer accounts that fit the specified filters"	No customer has the analysis code values chosen in Outgoing Batch .
"You need to map at least one of the key fields for the selected entity (...)"	An incoming web hook must map a field that identifies the record (for example the account reference).
"You need to select some fields" / "You need to select some web hooks"	Tick at least one entry before clicking Save .
Outgoing web hook feed shows errors in Export Feeds	The other system refused the message; the error is its reply. Check the end point, method and authentication.
"Order queued for processing ZID:..." (API reply)	The order is waiting on the API Order List.

Message or symptom	What it means / what to do
"Order already queued for processing" (API reply)	An order with the same identifier is already waiting.
"Channel ... does not exist" / "... is not enabled" / "... is not an API channel" (API reply)	The other system is using the wrong channel name, or the API channel is switched off.
"Order identifier is mandatory" and the other "... is mandatory" API replies	Validate online found a required value missing in the posted order.
"You need to provide a name"	Give the channel a name on the connection page.
"Successfully created customer data export feeds for ... modules"	The customer files have been created; they are sent by the upload automation or from Export Feeds .

Aliases, bundles, actions, job bags and notifications

Message or symptom	What it means / what to do
"Attempt to use Tilted stock aliasing without a customer account" (or "...Eureka...")	Settings ► Stock ► Aliasing is set to Tilted or Eureka customer stock items, which need the order's customer account. Map the customer account for the channel, or choose Use Channels .
A Missing Items text file opens after an alias import	The listed Sage stock codes do not exist. Correct the file and import those lines again.
"You need to setup an alias group for this module to generate inventory items"	This channel builds its product list from an alias group. Create an alias group, add the channel under Channels , and run the automation again.
"The percentage does not total to 100, do you want to continue?"	The components' % of Bundle Price values do not add up to 100, so the component prices will not add up to the bundle price. Click No and correct the percentages.
"Please ensure a positive quantity is applied to all lines."	A bundle component has a zero or negative quantity. Edit the component.
"Import Failed, see details in text file" (bundle import)	Nothing was imported. The text file lists each problem, for example "<code> : Invalid quantity", "<code> : Component '<x>' is not a Sage stock item" or "<code> : Percentage does not total 100". Correct the CSV and import again.
"You need to choose a warehouse first" (Add bundle)	Choose the warehouse on the sales order header before adding a bundle.
"Failed to locate warehouse item for item '<code>' (Add bundle)	A component is not stocked in the order's warehouse. Add the item to that warehouse or choose another warehouse.
A bundle code on a channel order is not split into its components	The bundle or its group is disabled, the group is linked only to other channels, or the code on the order differs from the bundle's Code .
A bundle's stock is not sent to a channel	Check that the bundle group is used for that channel (its Channels list is empty or includes the channel) and that the group and the bundle are enabled. For most channels the bundle code must also be one of the channel's inventory items.
"Note that you haven't added any criteria to this action, ..." / "Note that no channels have been assigned this action" / "Note that this action is not enabled"	The action was saved but will not run until it has a criterion, at least one ticked channel, and Enabled ticked.
"Selected value not allowed for selected execution point"	Sage record sources (Sales Order, Stock Item, Customer ...) need the Sage order. Use a Mapped Order Field source, or change the action's Execution to Before Committing or After Processing .
"The selected action is not available for execution method on this action"	At Before Processing only Channel Switch, Set Line VAT Codes, Set Order Mapping Field Value and Send Email are allowed. Change the Execution point first.
"Complete Order / Return is only available on an 'After Processing' action"	Set the action's Execution to After Processing .

Message or symptom	What it means / what to do
An action did not run on an order	Check that it is Enabled , that the order's channel is ticked under Channels , and that all its criteria (with And) are met. If the customer belongs to a customer group that has actions, only that group's actions run for the customer (section 10.6). Problems applying an action are written to the Channels log.
An order with Complete Order / Return was created but not despatched or invoiced	The order was on hold or not fully allocated. Deal with it in Sage; the order's Channels history shows why it was skipped.
"Please enter a name for the customer group." / "'<account>' has already been added."	Give the group a name; each customer can be added to a group once.
"You need to setup the Automation folder in Tilted Settings\Options first" (shown by Scheduled Task)	Set the Automation Folder : in Tilted Settings ► Options and run Regenerate Automation , then try again.
"Automation and logging folders should be UNC paths"	Enter the folders as network paths, for example \\SAGESERVER\Sage Automation .
"You need to select some functions" (Add Job)	Double-click a channel, then select at least one automation under Functions .
A scheduled job bag never seems to run, and there are no log files	Check the task's history in Windows Task Scheduler and its run-as account. The account must be a Sage 200 user that has logged in to Sage on that server. The company and job bag names in the task must match exactly. The logging folder must be reachable from the server.
Email "Channels Automation : Errors processing job '<bag>'"	The job bag logged an error. Open the attached _Errors.log and _Full.log . The lines before the error show which job and order were involved.
Email "Channels Automation : Warnings processing job '<bag>'"	The run finished but logged warnings, for example an order that needs attention. Check the attached logs.
Log line "Sleeping for <n> seconds before attempt <n> of ..."	The job failed and is being retried as set in its Options . Only the last failure is reported as an error.
A job for a channel runs but nothing happens	The channel (or its order download) is disabled. Enable the channel, or remove the job from the bag.
"You need to provide the minimum number of days from order creation to use the allocations notification"	An Allocation box is ticked. Enter the minimum number of days.
"As this notification was previously disabled it's starting point is going to be reset to the last imported order. ..."	Re-enabling a notification set starts it from the latest order, so customers are not sent notifications for orders converted while the set was off.
A customer did not receive a notification	Check, in order: the set is enabled; its channel is in Modules ; the type and transport are ticked; an enabled template of that type exists; the template's recipient route has an address (delivery email address or telephone number, or a contact with the role). Also check that Testing is off and the analysis-code exclusion does not apply, and that the notification feed was sent (Export Feeds). A notification is not sent if a later one for the same order already exists.
"You need to provide a number" (Test MessageBird)	Enter the full international number without the +.
"Purge Complete"	The purge finished. Completed orders and processed feeds older than the chosen date have been removed from Channels; Sage documents are unchanged.
The Log Entries window opens after Convert	One or more orders could not be converted. Each line gives the channel, the order and the reason. Correct the cause and convert those orders again.
"You need to setup the default Sicon CRM End User Options first" / "You need to setup the channel specific Sicon CRM End User Options for <channel> first"	Create Sicon CRM End User Record is ticked but its options are not set. Open Sicon CRM End User Options from the same panel and save them.

Inventory, products, shipments and export feeds

Message or symptom	What it means / what to do
"You will need to create/automate a snap shot first"	No inventory snapshot exists yet. Click Create Snap Shot (Settings ► Inventory or any Inventory List) or schedule the Create inventory snapshot job.
"There are no valid warehouses"	None of the warehouses ticked on Settings ► Inventory ► Warehouses exists any more. Tick at least one warehouse and save.
"Delta inventory upload not available as full upload has not been carried out first"	A channel needs one full inventory feed before deltas can be made. Create a full feed (or run the full feed job) first.
"Full inventory creation has returned no results. This may be due to not having downloaded any inventory items from the channel"	Channels does not yet know which items the channel lists. Click Refresh Inventory Items (or run the channel's download inventory items job), then generate the list again.
"Delta inventory creation has returned no results. This may be due to there being no movements since the last update"	Nothing has moved since the last feed – no action needed.
"You need to generate an inventory list first"	Click Generate Full List or Generate Delta List before Create Feeds .
"You need to choose a Channel"	Tick a channel under Channels on the Inventory List first.
"Successfully created inventory export feeds for 2 modules" but the customer received nothing	Creating files does not send them. Submit them on Channels ► Export Feeds or schedule Upload inventory feeds .
An inventory feed shows Processed but the recipient got no file	The file was empty – every item was filtered out for that recipient (product groups, analysis code filters, exclusions, or Only include items with customer codes with no customer codes). Check the channel's filters and the customer's item codes.
Stock figures sent are lower than Sage free stock	Expected when buffers apply (Settings Apply buffer , the channel's Additional inventory buffer ;, the item's Overriding inventory buffer ;; when Reduce free stock by back order quantity is ticked, or when the channel is restricted to specific warehouses.
A customer's file shows more than free stock	Include customer allocations is ticked and the customer has stock allocated (or reserved in Sicon) – it is added back for that customer only.
A BoM or kit item shows stock although none is in the warehouse	Include BoM potential build quantity / Include Sicon Kitting potential build quantity – the figure includes what can be built from component stock.
Scheduled inventory feeds have stopped	Check whether Pause Feeds has been used – the button reads Unpause Feeds while feeds are paused.
New purchase order dates are not in the feeds yet	New and rescheduled purchase orders are picked up by the next full snapshot.
"Fixed qty needs to be empty or a number on 'ABC123'"	Correct the Fixed Qty for that item on Exclusions .
"You need to select a customer account" / "You need to select a customer"	Every inventory recipient must be linked to a Sage customer – choose one in Customer ..
"You need to provide an ftp account"	Choose an FTP Connection : (set up on Settings ► FTP Sites).
"You need to provide a filename"	Choose a file before clicking OK on Import / Export Product Data.
"Some errors occurred whilst importing updates"	Click OK to see the items that failed and why (for example "Failed to locate stock item", "Column 'x' does not exist"); the other rows were imported. Correct the file and import the failed rows again.
"The columns below are duplicated, the analysis code names for these will need to be made unique."	Two stock analysis codes have the same name in Sage. Rename one, then export again.

Message or symptom	What it means / what to do
A shipment row cannot be ticked	It has already been sent, or a detail the channel requires is missing (Carrier Mandatory, Tracking Mandatory, Tracking URL Mandatory, SSCC Mandatory). Add the detail (type it, correct the order's analysis codes and Find , or Import Carrier & Tracking), or select the row and click Enable if you are sure.
A despatched order does not appear on the Shipment List	It is not a Channels order, the despatch is not yet posted, or the channel is waiting for the Carriers consignment (scheduled runs wait up to three days).
"Not enough columns in data file."	The tracking import file needs at least order number, carrier and tracking number columns, with a header row.
"Import Complete - 0 Updates Carried Out"	No order in the file matched an unsent shipment. Check the match option (Channel Identifier, SOP Document No, SOP Cust Document No) and that the orders are in the ticked channels.
No tracking link is produced	The shipment has no tracking number, or the courier value has no Tracking URL in Courier Mapping.
A delivered order cannot be ticked on the Delivered Order List	It has no Delivered Date yet or has already been sent. Enter the date and search again.
"Are you sure you want to roll back the selected n feed(s)?"	Rolling back makes the feed's orders, shipments or invoices available for the next feed.
"Export feed '...' cannot be rolled back: ..."	A third-party warehouse has already been sent later instructions that depend on this feed. Deal with the later feed first, or contact your Channels partner.
"No export feeds found for selected order"	Nothing has been sent for that order yet.
"2 of 10 feed(s) failed to submit: ..."	Each failed feed and its reason is listed; the others were sent. Fix the cause and submit the failed ones again.
A feed's status is Processed with errors and the job has not retried it	Upload jobs send New feeds only. Fix the cause and Submit it from Export Feeds.

Sage 200 screens

Message or symptom	What it means / what to do
No Channels tab or Channels buttons on a Sage screen	The additions appear only in the Sage 200 desktop, for a company licensed for Channels (3PL licence for Virtual Free and 3PL Packaging). Check the licence and reopen the screen.
A message naming a feature that "is not licensed" when a Sage screen opens	The company's licence does not include that feature. Contact your Sage business partner; the screen works normally without the Channels additions.
No Add bundle button on the sales order	Tick Enable SOP Customisation on the Channels Settings screen and reopen the order. The button is not shown on View Order .
Release to 3PL is greyed out	The document has not been saved yet – save it first.
Linked Purchase Orders is greyed out	No purchase order has been raised for this order's lines with a drop-ship (supplier) 3PL.
"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."	The order did not come from a channel and no Text File channel has Record manually entered orders / returns ticked (with Return orders set to match), or the customer has Disable recording of manual orders / returns ticked.
"This order has an amendment release held for the 3PL. Release it now?"	The 3PL channel holds amendments until you click Release to 3PL . Click Yes to release it now.
"Everything ordered has already been released to the 3PL. Further quantity is released automatically as it is added or allocated, and reductions raise cancellation requests."	Nothing new to release – later changes go automatically.
"Everything on this return has already been sent to the 3PL. Amendments are sent when the return is saved."	Nothing new to release on the return.

Message or symptom	What it means / what to do
"This return has no lines for a 3PL warehouse, or no 3PL channel sends sales returns."	Check the warehouse on the return lines and that the 3PL channel is set to send sales returns.
"This purchase order has no lines for a 3PL warehouse, or no 3PL channel sends purchase orders." (or purchase return)	Check the warehouse on the lines and the 3PL channel's purchase settings.
"Everything on this purchase order has already been released to the 3PL. Amendments are released as they are saved, or from this button when amendments require it."	Nothing new to release.
"This sales order has not been imported through a channel and there are no manual entry channels enabled"	Line attributes can be added to a manually entered order only when a Text File channel has Record manually entered orders / returns ticked and is enabled.
"Discard changes?" in the line attributes window	You double-clicked another line while editing. Click No and Save first to keep your changes.
"You need to select a bundle"	Choose a bundle in Add Bundle before clicking Save .
"No data available" when clicking Link in Events	The file behind the event is no longer kept (for example after housekeeping).
3PL Packaging is greyed out	With the Carriers add-on installed, cartons for the despatch are kept by Carriers – use its Cartons button. Without Carriers, select a despatch row first.
"The selected delivery address is linked to a Channels EDI Customer Location. You will need to delete the entry from there first."	Remove the EDI customer location that uses the address, then delete the address.
"This line is linked to purchase order '...' and has been sent to the supplier ..." when deleting a sales order line	The line was sent to a drop-ship supplier. The line is deleted in Sage; contact the supplier to cancel it.
"This customer does not have a Sparklayer customer group setup" (from Sparklayer Options)	Set the customer's SparkLayer customer group analysis code first.
Sparklayer Options is greyed out	No SparkLayer site is set up in Channels.
The Woocommerce options on the item's Channels tab are greyed out	There is no WooCommerce channel, or it has Upload inventory figures rather than in / out of stock ticked, in which case these per-item options are not used.
Included Warehouses is greyed out on the item's Channels tab	Default 3rd party logistics option is Include – the list is used only with Exclude .