Sage

Overview

Sage's e-commerce solutions offer integrated tools for efficient financial management, multi-channel selling, and secure online transactions. With features like inventory management, analytics, CRM integration, and scalability options, Sage aims to enhance online businesses' efficiency and customer experience. This document will guide you through the process of installing the Sage accounting channel on Channels.

Installing Sage on Channels

1. Navigate to the "Stores" page by selecting the "Stores" button in the left-hand menu.
2. You can edit your store details by clicking the pen icon on the right side below the "Actions" section. For a comprehensive understanding of store functionalities, consult our dedicated documentation page, available here.
3. Access the "Accounting Channel" tab at the screen's top.
4. Add an accounting channel by clicking the "+ Add" button on the accounting channel page.
5. Choose "Sage" from the list of accounting channels.
6. Provide the necessary details as outlined below and click "Save":
   - **Channel Name:** Specify the name for this integration.
   - **Account Nominal Code:** For customers using our Billing API, obtain this number through the Billing API. You can disregard this field if you are not a Billing API customer.
   - **Region:** Choose the country in which your Sage account is registered.
   - **Add Products to Sage:** Enable this option to send system-created products to Sage.
   - **Create Nonexistent Products:** If not available on Sage, record products in created invoices as the main product.
7. Finalize the integration by clicking the "Connect" button between Sage and Channels.
8. Log in and confirm the connection on the Sage page to proceed.
9. Congratulations! Your channel is now successfully connected. Click "Continue" to return to Channels.
10. Activate the Sage channel by toggling the switch in the "Is Active" section at the top of the page; ensure it is turned on for proper functionality, as deactivation will render it inactive.

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Revision #1
Created 31 May 2024 09:40:08 by Despatch Cloud
Updated 31 May 2024 09:40:28 by Despatch Cloud