Sales Channel Options

Overview

This document lets you discover the functionality of the options encountered when installing sales channels.

Details of the Sales Channel Options

> Kindly note that while Channels support these options, their availability may vary based on the supported features of the respective sales channel platforms.

Fulfilment Management

- **Use Custom Fulfilment Status:** When you submit fulfilment for an order (indicating that the order has been processed and shipped), you can set a custom status for that specific order. If turned on, the system will prompt you to enter the custom status manually in a textbox. You can write a label or a term that reflects the particular stage of fulfilment that the order has reached.

Location Management

- **Select Default Location:** This option allows you to set a default location for your orders. When an order doesn't specify a particular location, the default location will be applied.
- **Select Warehouse:** This dropdown list lets you choose a specific warehouse from which the products will be shipped. It is beneficial if you have multiple warehouses.
- **Select Delivery Option:** This dropdown list lets you choose a preferred delivery option for your orders. It could include various shipping methods or carriers that you have available.
- **Restrict Orders by Location:** This feature allows you to restrict orders based on the location. For example, you might want to limit certain products or services to specific regions or countries.
- **Restrict Products by Location:** This option restricts the availability of specific products based on location. This could be helpful if certain products are only meant for specific markets.
- **Use Multiple Fulfillment Tracking:** This feature permits you to generate multiple shipments for a single order. By default, the system restricts the creation of more than one fulfilment. If you turn off this option, the system will prohibit partial fulfilment of orders on the designated channel.

Notification Management

- **Receive cancelled order notifications:** When enabled, it means that you want to receive notifications whenever an order is cancelled within your e-commerce platform.
- **Notification Emails:** If you turn on the "Receive cancelled order notifications" option, you must enter an email address in the "Notification Emails" box on the right side. This is the email address to which notifications about cancelled orders will be sent.

Order Management

- **Automatically Confirm Orders:** Enable this feature to simplify your order processing workflow by having Channels automatically confirm incoming orders from your integrated sales channels. When an order is placed, it will be instantly marked as confirmed, allowing for faster processing and fulfilment. This option reduces the need for manual review and confirmation, ensuring that your orders move through the system efficiently and minimizing delays. Ideal for businesses that handle a high volume of orders or those looking to enhance operational efficiency, this feature helps maintain a smooth and rapid order processing cycle.
- **Get Unpaid Orders:** This option allows you to retrieve or view orders that are marked as unpaid, helping you manage and process outstanding payments.
- **Use Partial Fulfillment:** Enabling this option allows you to fulfil and ship orders partially. This is useful when some items in an order are ready for shipment while others may be on backorder.
- **Add Reference Number to Shipping Address:** This feature allows you to include a reference number in the shipping address. It can help cross-reference or organize orders.
- **Fetch Shipped Orders:** This retrieves and displays orders already shipped. It can help track and manage the fulfilment process.
- **Auto Create Invoices:** If this option is turned on, the system automatically generates an invoice in the sales channel when an order is downloaded.
- **Fetch POS (Point of Sale) Orders:** This feature enables the system to fetch orders made through a Point of Sale system.
- **Fetch Cancelled Orders:** This option retrieves information on orders that have been cancelled.
- **Auto Sync Orders:** This option automatically marks orders synced when fetched via API (Application Programming Interface).
- **Auto Hold Aged Orders:** If this option is activated, aged orders over 24 hours old at the time of system import will be automatically put on hold.
- **Use Default Get Orders Interval:** If turned off, you can set a default interval for retrieving orders. For example, it fetches orders every X seconds. If turned on, it will use the default interval set by us.
- **Add Prefix to the Beginning of Order Numbers:** If turned on, this option allows you to add a prefix to the order numbers, which can be helpful for organizational purposes.
- **Use Default Order Import Delay:** This option offers a time delay before orders are imported into the system after being placed. If turned on, it will use the delay interval set by the system; if turned off, you can set an interval yourself.

- **Ignore Orders Before:** If activated, you will be prompted to select a date, and orders placed before that date will be ignored.
- **Notify Customer:** Customers are notified when fulfilment information is updated for their orders.
- **Use Default Shipping Method:** Sets a default shipping method value if the shipping method is empty on an order.
- **Use What3Words:** If enabled, the system will use What3Words to pinpoint the customer's exact location.
- **Get Customer:** Retrieves customer information from registered customers.
- **Ignore Company Name:** When active, the system will ignore the company name field as long as the first and last names have values.

Order Polling

- **Order Polling:** Order polling is a process where the system regularly checks for new orders on the connected sales channels. If this feature is turned on, you will be prompted to set a "poll time." The poll time refers to the interval between each check for new orders. For example, if you set a poll time of 15 minutes, the system will check for new orders every 15 minutes.

Push All Stocks

- **Push all stocks:** It implies that you want to synchronize the stock information between your e-commerce system and the connected sales channels for all available products. If this feature is turned on, you will be prompted to set a "time." This refers to a specific time at which the system will automatically initiate the process of pushing or updating stock levels for all products. For example, if you set a time of 2:00 AM, the system automatically updates stock levels every day at 2:00 AM.

Rate Limits

> Adjusting the rate limits could lead to system instabilities if you set a limit beyond what the sales channels can handle. We recommend keeping these values unchanged, as we've already optimized them at the maximum rates. However, if you choose to modify them, please review the API rate limits for the specific channel(s) you're integrating before making any adjustments.

- **Update Stock Allow:** This refers to whether the system allows the update of stock levels.
- **Update Stock Every:** If enabled, this setting specifies the time interval (in seconds) between stock-level updates. For example, if set to 300 seconds, the system would update stock levels every 5 minutes.
- **Update Fulfillment Allow:** Similar to "Update Stock Allow," this refers to whether the system allows the update of fulfilment status.

- **Update Fulfilment Every:** This setting specifies the time interval (seconds) between updates and fulfilment status. For instance, if set to 600 seconds, the system would update the fulfilment status every 10 minutes.
- **Products Limit in Each Request:** This setting determines the maximum number of products that will be pulled from the sales channel in each data request. For example, if set to 50, the system would retrieve information for 50 products at a time.

Stock Management

- **Download Products:** This option lets you download products from the sales channel and add them to your inventory or product list.
- **Download Product Images:** Enables the download of product images associated with the products from the sales channel.
- **Download Product Dimensions & Weights:** This feature lets you download information about product dimensions and weights from the sales channel.
- **Download Product Customs Information:** This option downloads additional customs information for products, such as the HS Code (Harmonized System Code) and Country of Origin.
- **Add to Products:** Add the downloaded products to the list or inventory of your main products.
- **Overright Stock Levels:** This function sets the initial stock level of products via the channel. It could be helpful for syncing stock levels when setting up your inventory.
- **Auto Sync Stock:** When enabled, changes in stock levels will be automatically synced with the sales channel, ensuring that both your system and the channel have up-to-date stock information.
- **Push Stock Levels:** This feature pushes the main product stocks to the channel's product stocks, ensuring consistency between your inventory and the sales channel.
- **Auto Deduct Stock For Orders:** This feature automatically updates stock levels when an order is received, deducting the sold quantities from the available stock.
- **Refetch Products:** Initiates a process where all products are fetched immediately from the sales channel.
- **Refetch Location Levels:** This function retrieves stock levels of all products regardless of their last updated date, ensuring the latest information.
- **Fetch Product Metafields:** A separate request is made to the sales channel to fetch specific product metafield data. Metafields can hold additional information about products beyond standard attributes.
- **Allow Increase/Decrease Stock Levels:** This option updates the stock levels based on the increase or decrease option. It could be helpful for manual adjustments.
- **Use Default Get Products Interval:** This option delays time before fetching products from the sales channel. For example, products may be fetched every X seconds. If turned on, it will use the default interval; if you turn it off, you can set it manually.
- **Enable Low Stock Buffer:** When turned on, this feature automatically sets stock levels as 0 on channels when your product quantities are below or equal to a specified limit. It helps prevent overselling when stock is low.

Taxes

- **Auto Calculate Tax:** It allows the system to calculate taxes for orders automatically. Users can input the tax rate as a percentage when this feature is turned on. Additionally, users have the option to set country-based taxes. The example provided indicates that you can specify tax rates for different countries using their ISO codes. For example, "GB:20" means a tax rate of 20% for orders from the United Kingdom, and "IE:20" means a tax rate of 20% for orders from Ireland. If you want to add taxes for each country, you would separate the entries with commas. If the field is blank, the global tax rate is used for all orders.

Couriers and Courier Service Mapping

As most sales channels use different formatting rules and might have different names for their couriers than we do, it is imperative to map couriers or courier services in a way that fits into their system to prevent errors from occurring. Channels allow you to choose the courier/courier service you want to use and send it back to the sales channel with a custom name.

Here's a simplified explanation for these features:

- **Couriers:** It ensures the correct naming conventions are used when setting up couriers for different sales channels.
  - **Purpose:** You can specify and customize the courier information for different sales channels.
  - **Function:** When setting up a courier like Royal Mail for a specific sales channel, you can give it a custom name that fits the rules or format required by that sales channel. For example, Royal Mail might be entered as "RM" for one platform and "Royal Mail UK" for another, based on the sales channel's requirements. The correct courier codes and names can be obtained from the sales channel's support team.
- **Courier Service Mapping:** It allows you to manage courier names internally while meeting each sales channel's external requirements.
  - **Purpose:** This feature enables you to customize how courier information is displayed in your system while ensuring it matches the requirements of the sales channel when sending information back.
  - **Function:** If you have configured a courier for a sales channel and labelled it "Courier A," you can give it a custom name like "Courier B" within your system. This way, it appears as "Courier B" internally, but when sending fulfilment information back to the sales channel, it uses the name "Courier A" to fit their requirements.

To learn about how to configure these options, follow the steps below:

1. Access your account and go to the left side of the screen. Click the "Stores" button.
2. If you already have a store, click "View Store" on the right side of the screen to access it.
3. To edit an existing store, click the edit button on the right side. If you need to create a new store, click "+ ADD" above, name it, and use the edit button to make changes.
4. If you don't have the desired sales channel installed, click "+ ADD" in the Channels section to begin the installation. If you already have it installed, use the edit button through the entry list to see its details.

5. See the highlighted area to access the couriers and the courier service mapping screen.
6. Once you click "Couriers," you will be taken to the page where you can select the courier you sent in the fulfilment creation request. This courier should be the one you want to use with the sales platform. You can enter a custom name for the courier in a way that fits with the rules of the sales platform you're looking to use. This is the name that will be sent to the sales channel. Please contact your sales channel account manager to get the courier codes and names list for the channel in question. Once you modify everything, don't forget to click the "Save" button to finalize the process.
7. Once you click "Courier Service Mapping," you will be taken to a page where you can select a courier and configure its custom name. Once you are done configuring, click "Save" to save this entry.

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