

## System Solutions LLC Sellercloud for D365 Business Central User Guide

### Extension

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### System Requirements

- You must have a Sellercloud Account: <https://sellercloud.com/>
- Sellercloud pricing: [Pricing | Omnichannel E-commerce Growth Platform | Sellercloud](#)

### Description

- Sync items from Sellercloud to Business Central and keep their quantities up-to-date in both systems.
- Items only go in one direction presently, from Sellercloud to Business Central.
- Completed sales orders and purchase orders in Sellercloud are synced to Business Central as item quantity adjustments.
- Open sales orders in Business Central are added to Sellercloud as wholesale orders.
  - This reserves the quantities on the order.
- Posted sales invoices in Business Central are created as orders in Sellercloud using the channel selected on the setup ("local store" is the default). The sales are marked as paid with cash and shipped.
- Any changes made to item quantities in Business Central are synced to Sellercloud as inventory adjustments.
  - This includes purchases, credits, and misc. adjustments.
  - This excludes sales, which are added directly as orders instead.
- The Job Queue in Business Central is used to regularly check for updates to and from Sellercloud.
  - One Job Queue Entry syncs inventory, sales, and purchase updates from Sellercloud.
  - One Job Queue Entry syncs item quantity changes to Sellercloud.

### Sellercloud Setup Page

- Sellercloud Connection
  - **URL Subdomain:** Specifies the subdomain of the API URL. For example, the subdomain shown in the URL "https://red-blue-green.api.sellercloud.us/rest/api/Orders" is red-blue-green.
    - To find your Sellercloud API URL, you can use your Sellercloud **team name** and open this link in your browser:  
<https://api.sellercloud.com/api/server-by-team/?team=TEAMNAME>.  
The RestApiEndpoint field on this page shows your Sellercloud API URL.
  - **Username:** Specifies the username used to login to the Sellercloud account.
  - **Password:** Specifies the password used to login to the Sellercloud account.

- Items in Business Central
  - **Create Items:** Specifies that new items should be created in Business Central from Sellercloud.
  - **Update Items:** Specifies that existing items should be updated from Sellercloud to fields including Description, Weight, and UPC (item reference).
  - **Item Template:** Specifies the item template used when creating tax liable items in Business Central. Be sure the template has a No. Series selected in case the item numbers from Sellercloud are already used in Business Central by other items. The Gen. Prod. Posting Group and Tax Group Code fields are also used to update the item if its tax exempt status is changed.
  - **Tax Exempt Item Template:** Specifies the item template used when creating tax exempt items in Business Central. Be sure the template has a No. Series selected in case the item numbers from Sellercloud are already used in Business Central by other items. The Gen. Prod. Posting Group and Tax Group Code fields are also used to update the item if its tax exempt status is changed.
  - **Match Items by UPC:** Specifies that Sellercloud products synced to Business Central for the first time can be matched by Sellercloud UPC and Business Central item reference (barcode type). Note that if multiple Sellercloud products have the same UPC, they will be matched to the same item in Business Central.
  - **Match Items by Item No.:** Specifies that Sellercloud products synced to Business Central for the first time can be matched by Sellercloud SKU and Business Central item number. Note that if a Sellercloud SKU matches a Business Central Item No., they will be considered the same item.
  - **Update Unit Price:** Specifies that items' unit prices should be changed from Sellercloud updates.
  - **Use Product Type As Category:** Specifies that the Product Type field in Sellercloud should be used as the item's category in Business Central. This will create new categories in Business Central.
- Inventory in Business Central
  - **Inventory Journal Template:** The Item Journal Template used to post item quantity changes in Business Central.
  - **Inventory Journal Batch:** The Item Journal Batch used to post item quantity changes in Business Central.
  - **Inventory Location Code:** The location used when posting item quantity changes to Business Central. Leave blank if no location should be used.
  - **Entries To Sync As Adjustments:** Specifies the types of item ledger entries in Business Central other than sales that should be synced as inventory adjustments in Sellercloud. Sales will be created directly in Sellercloud as orders, but negative quantities on sales lines will be synced with the item ledger entries.

- **Item Ledger Entries Last Synced At:** Specifies the date and time that item ledger entries were synced to Sellercloud in order to update changes in inventory. Set this to a recent date before using the job queue.
- Inventory in Sellercloud
  - **Sellercloud Warehouse Id:** Specifies the id of the warehouse set up in Sellercloud that inventory changes from Business Central will be synced to. In your Sellercloud account, go to Settings > Inventory > Manage Warehouses.
  - **Inventory Sync Method:** Specifies how inventory quantities should be synced from Sellercloud to Business Central. Select Inventory Physical Quantity to copy the quantities directly from the items' physical quantities in Sellercloud. Select Sales and Purchase Orders to sync movement from Sellercloud sales and purchases as they're completed.
  - **Inventory Last Downloaded From Sellercloud At:** Specifies the date and time that inventory updates were last pulled from Sellercloud in order to update items in Business Central.
- Sales in Sellercloud
  - **Sellercloud Company Id:** Specifies the id of the company set up in Sellercloud that sales and purchases from Business Central will be synced to. In your Sellercloud account, go to Settings > Inventory > Companies.
  - **Sellercloud Channel Id:** Specifies the numeric identifier of the channel in Sellercloud that should be used when sending posted sales to Sellercloud. Sales order data downloaded from Sellercloud will skip this channel. Use 0 for the Local Store channel. For the full list of channels go to: <https://developer.sellercloud.com/dev-article/channels/>. Sellercloud may not allow every channel to be used.
  - **Alternate Customer Sync Method:** Specifies how to provide a sale's customer information to Sellercloud if there is no valid email address. If "Customer No. As Email" is selected, a fake email address using the customer number in Business Central will be provided (example: C0001@sellercloud.com). If "Generic Customer" is selected, the sale will be assigned to the specified generic customer in Sellercloud.
  - **Generic Customer Id:** Specifies the ID of the customer in Sellercloud that will be used when adding sales from Business Central from a customer without a valid email address.
  - **Generic Customer First Name:** Specifies the first name of the customer in Sellercloud that will be used when adding sales from Business Central from a customer without a valid email address.
  - **Generic Customer Last Name:** Specifies the last name of the customer in Sellercloud that will be used when adding sales from Business Central from a customer without a valid email address.
  - **Generic Customer Email:** Specifies the email address of the customer in Sellercloud that will be used when adding sales from Business Central from a customer without a valid email address.

- **Sales Orders Last Synced At:** Specifies the date and time that item ledger entries (excluding sales invoices and shipments) were synced to Sellercloud in order to update changes in inventory. Set this to a recent date before using the job queue.
- **Posted Sales Invoices Last Synced At:** Specifies the date and time that posted sales invoices were last synced to Sellercloud. Set this to a recent date before using the job queue.

### Operation Instructions

- On the Sellercloud Setup page > Actions, there are multiple buttons that allow data to be manually synced between Sellercloud and Business Central. These operations are also performed automatically by the job queue.
  - Inventory
    - **Download Inventory From Sellercloud:** Download item information from Sellercloud to view in Business Central.
    - **View Inventory From Sellercloud:** Show the item information downloaded from Sellercloud.
    - **Sync Inventory From Sellercloud:** Sync the previously downloaded item information from Sellercloud to Business Central. If an item can't be found, a new one will be created.
      - If an item hasn't already been synced to Business Central, it will attempt to find its UPC in Business Central item references. If an item still can't be found, a new one will be created.
      - When a new item is created in Business Central, its current inventory quantity in Sellercloud will also be posted in Business Central.
    - **View Pending Inventory Adjustments To Sellercloud:** Show item ledger entries in Business Central that occurred after the last time inventory quantities were synced from Business Central to Sellercloud.
    - **Sync Inventory Adjustments to Sellercloud:** Sync changes to item quantities from Business Central to Sellercloud.
      - These are synced by making physical inventory adjustments in Sellercloud.
      - Item ledger entries dated after "Item Ledger Entries Last Synced At" on the setup page and "Sellercloud Item Ledger Entries Last Synced At" under the Inventory tab of the item card are included.
      - Inventory changes from posted sales invoices are excluded since they are synced directly to new orders in Sellercloud instead.
  - Purchase Orders

- **Download Purchase Orders From Sellercloud:** Download completed purchase orders from Sellercloud to view in Business Central.
  - Completed purchase orders created within the last year will be downloaded.
- **View Purchase Orders From Sellercloud:** Show the purchase orders downloaded from Sellercloud.
- **Sync Purchase Orders From Sellercloud:** Sync the item quantity changes of the previously downloaded purchase orders from Sellercloud to Business Central.
  - These are synced by making positive adjustments to the quantities in Business Central.
  - If the purchase is marked as already processed or if the item was created after the sales order's date, it will be skipped.
- Sales Orders
  - **Download Sales Orders From Sellercloud:** Download completed sales orders from Sellercloud to view in Business Central.
    - Completed sales orders paid within the last 7 days will be downloaded, skipping any orders from the selected channel on the setup page and wholesale orders.
  - **View Sales Orders From Sellercloud:** Show the sales orders downloaded from Sellercloud.
  - **Sync Sales Orders From Sellercloud:** Sync the item quantity changes of the previously downloaded sales orders from Sellercloud to Business Central.
    - These are synced by making negative adjustments to the quantities in Business Central.
    - If the sale is marked as already processed or if the item was created after the sales order's date, it will be skipped.
  - **Sync Sales To Sellercloud:** Sync changes to sales orders and new posted sales invoices to Sellercloud.
    - Every open sales order is synced by deleting any existing order for it in Sellercloud, then creating a new wholesale order. If the order cannot be deleted in Sellercloud due to a dropship status, the extension will instead add any new items to the order.
    - Once a sale is posted, the posted sales invoice is created. If the customer doesn't have a valid email address, it uses a generic customer. It's then marked as paid by cash and shipped. If the order still has a dropship status in Sellercloud, it cannot be recreated in Sellercloud. This can be addressed by fixing the status of the order in Sellercloud and syncing the individual invoice manually.

- If a posted invoice has a total of 0, Sellercloud will not allow it to be shipped unless "allow shipping unpaid orders" is enabled. Otherwise, an error will occur while syncing. In Sellercloud check the following settings:
        - Settings > Client Settings > Orders > "Allow shipping unpaid orders."
        - Settings > Company Settings > Toolbox > Shipping > Shipping Preferences > "Allow shipping regardless of payment status for selected customers."
      - Sales orders and posted sales invoices can both be synced individually on their corresponding pages.
        - Force Refresh Access Token: Use to refresh the access token in case an authentication error occurs. This is not normally used.
- From the **Item List**, you can view which items are synced to Sellercloud items. Add a filter for the **Sellercloud SKU** field with a value of <> ". This filter means "not blank" and will show every item with a value in this field.
- From the **Item Card**, you can view or modify the **Sellercloud SKU** field under the Item tab. This connects it to an item in Sellercloud.
- From the **Item Card**, you can sync the specific item from Sellercloud to Business Central by going to Actions > Sellercloud > **Sync From Sellercloud** action.
- From the **Item Card**, if all types of Business Central item ledger entries are enabled to sync, you can send the item's current quantity in Business Central to Sellercloud as a physical inventory count. Go to Actions > Sellercloud > **Send Inventory Count to Sellercloud**. This action is hidden if no or only specific entries are enabled to sync to Sellercloud because it's assumed that the Sellercloud inventory will overwrite Business Central inventory.
- From the **Sales Order** page, you can manually sync the sale to Sellercloud or reset the status. Go to Actions > Sellercloud > **Sync to Sellercloud**. This will delete any existing orders for it in Sellercloud, and create a new wholesale order for any items that have a Sellercloud Id and a quantity to ship in the order. The Reset Sync Status action can be used for troubleshooting by changing the status of the sale in Business Central. If a synced Sales Order is deleted in Business Central, the wholesale order will be deleted from Sellercloud.
  - If the order has a dropship status in Sellercloud, it cannot be deleted. To update these orders, the extension will instead check for any new lines since the last sync time of the sale and add them to the order in Sellercloud. The Last Synced At field for the sale can be changed on the Reset Sync Status page.
- From the **Posted Sales Invoice** page, you can manually sync the sale to Sellercloud or reset the status. Go to Actions > Sellercloud > **Sync to Sellercloud**. This will create a new wholesale order for any items that have a Sellercloud Id using the set up generic customer. It will then mark the sale as paid with cash and shipped.. The Reset Sync Status action can be used for troubleshooting by changing the status of the sale in Business Central. It can also be used to change the amount to send with

the sale's payment or to mark the invoice as "Do Not Sync," which will make the job queue skip it.

- If deleting a previously synced sales order is blocked due to a drop ship status, it will be flagged as "Delete Blocked by Sellercloud" on the Reset Sync Status page. Posted invoices should not normally still have a dropship status since the purchase order will typically be completed in Sellercloud. If this is not the case, the job will check its dropship status and try again once a day for another two weeks. It can also be synced manually on the Posted Sales Invoice page once the status is fixed in Sellercloud.
- From the **Item Ledger Entries** page, the Reset Sync Status is also available to mark the selected entry as synced or not synced. This is used when item movement other than sales is synced from Business Central to Sellercloud.

### **Setting Up the Job Queue Entries**

- Two Job Queue Entries will be automatically created with an "on hold" status. Go to the Job Queue Entries page in Business Central, update the "No. of Minutes between Runs" to set how often you'd like them to run, and set status to ready. Before using the job queue, it's recommended to manually sync data as explained above and review everything at least once before it's synced to Business Central.
  - Codeunit 70372331 SySo From Sellercloud Job
    - This does the same operations that retrieve data from Sellercloud as described above: download inventory, sync inventory, download purchase orders, sync purchase order quantities, download sales orders, sync sales order quantities.
    - Downloading sales and purchase orders can take time, so it's suggested not to have this task run too frequently if Inventory Sync Mode is set to include them. Run the syncing manually to determine an appropriate time based on how long it takes to finish. For example, if syncing takes 10 minutes, set the task to run at most every few hours.
  - Codeunit 70372330 SySo To Sellercloud Job
    - This does the same operations that send data to Sellercloud as described above: creates sales and sync item ledger entries as physical inventory adjustments.