CSM FOR AMAZON

An App by Suite Engine

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Order Management Setup

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ORDER MANAGEMENT SETUP

This document presents setup information regarding the CSM for Amazon Order Management functionality for Dynamics 365 Business Central.

Please ensure that the CSM for Amazon app and its dependent apps are correctly installed in your Dynamics 365 Business Central instance before proceeding.

Contents

Introduction

CSM for Amazon is an out-of-the-box integration between Microsoft's Dynamics 365 Business Central ERP software and Amazon's seller marketplace. This integration allows online retailers to keep the ERP business software they use to run their business in sync with their online marketplace(s). Automated processes are used to create Business Central sales orders in response to Amazon marketplace activity, as well as update these orders and other related records as new information is recorded in either system.

A Note on Amazon APIs

In 2021, Amazon introduced its Selling Partner API (SP-API) as a modern replacement to its legacy Marketplace Web Service API (MWS API). These API suites are used by Amazon marketplace sellers to send data between their Amazon environment and external applications. While Amazon MWS API continues to be used by sellers who set up their Amazon marketplace prior to the introduction of SP-API, all new marketplace sellers receive and are expected to use the modern API suite. Although MWS API users are not required to migrate to SP-API, Amazon is no longer adding functionality to the MWS API set, and will be deprecating these legacy APIs at some point in the future.

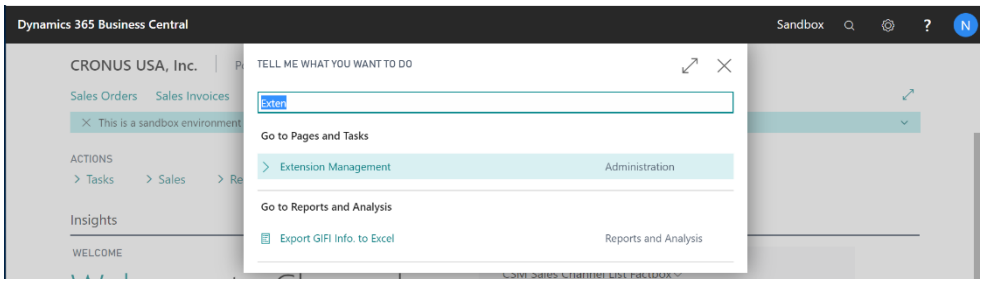
CSM for Amazon supports both SP-API and MWS API suites. When you are in the process of setting up a new sales channel, CSM will prompt you to specify the API set you want to use. CSM will manage the exchange of data between Amazon and Business Central according to the API set you select.

For more information on Amazon SP-API, please see here.

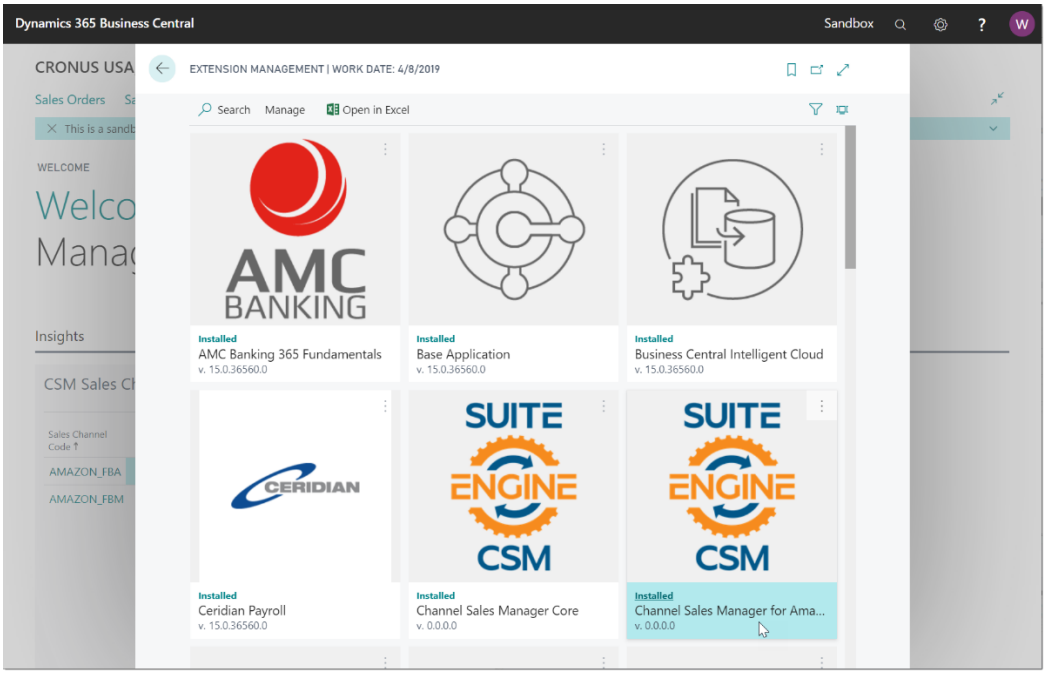
CSM Initial Setup

Manage the Amazon for CSM Extension

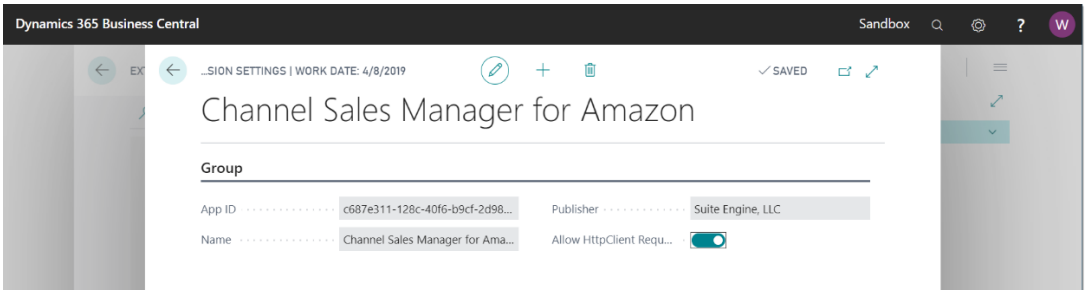
CSM requires a setting to allow it to initiate communication to Amazon. This setting can be found in the Business Central Extension Manager. You can press the gear in the upper right to search for a page to navigate to.



Find Channel Sales Manager for Amazon in the list of extensions, and select the ellipses (three vertical dots), and select configure from the drop-down menu.



Ensure that the “Allow HttpClient Requests” switch is on. Perform this on the three apps: Channel Manager for Amazon, Channel Sales Manager Core, and Suite Engine Common Base.

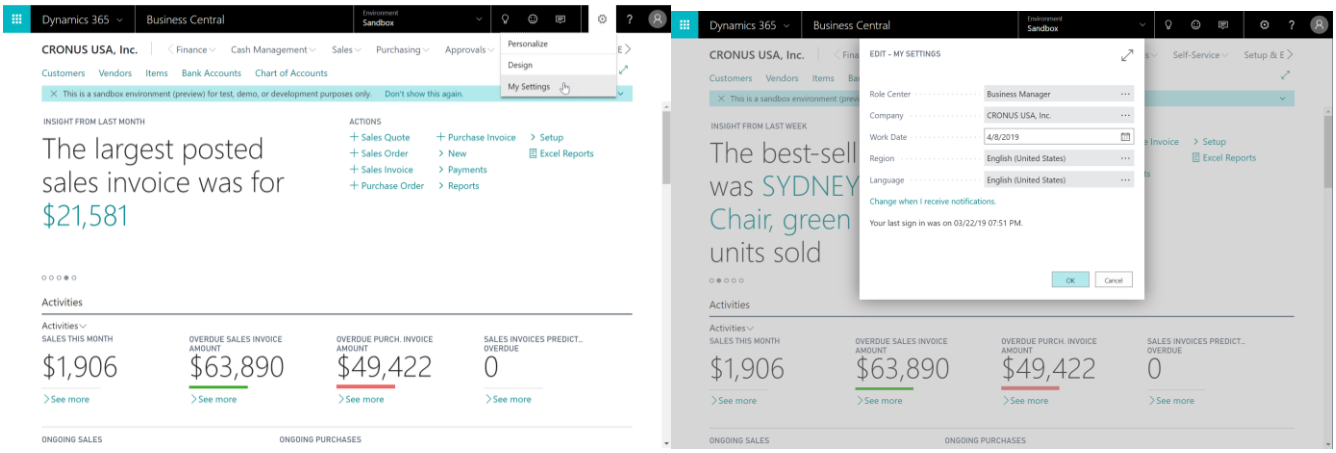


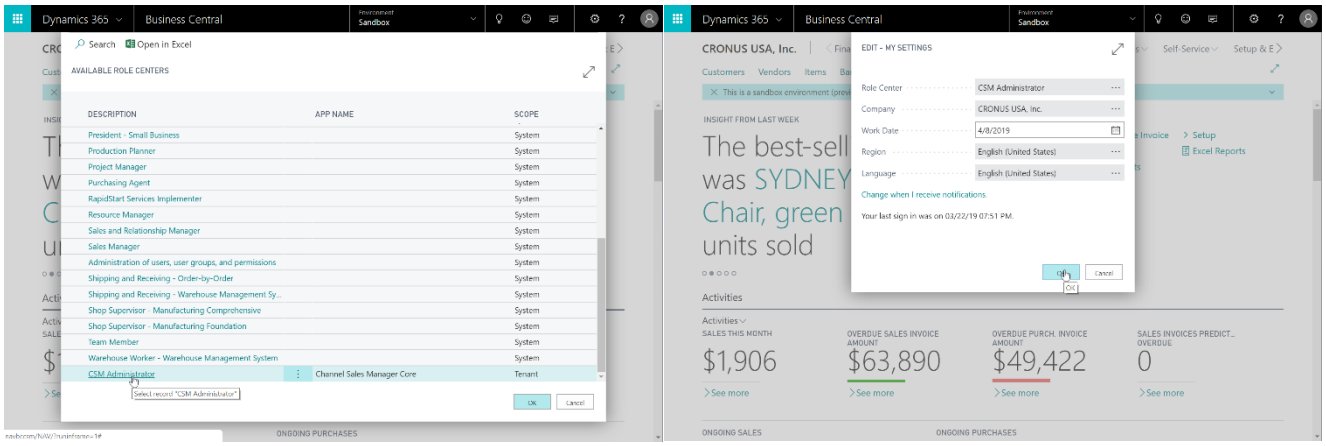
CSM Role Center

CSM provides a Role Center with content specific to CSM functionality. It is recommended that this Role Center be enabled to best understand this setup documentation.

To enable the CSM Administrator Role Center:

- Logon to Dynamics 365 Business Central and ensure that your company is set correctly.
- Search for "My Settings" or go to the Gear in the upper, right-hand corner and choose "My Settings" and change your Role Center to "CSM Administrator".





- Your screen should now refresh to the CSM Administrator Role Center.

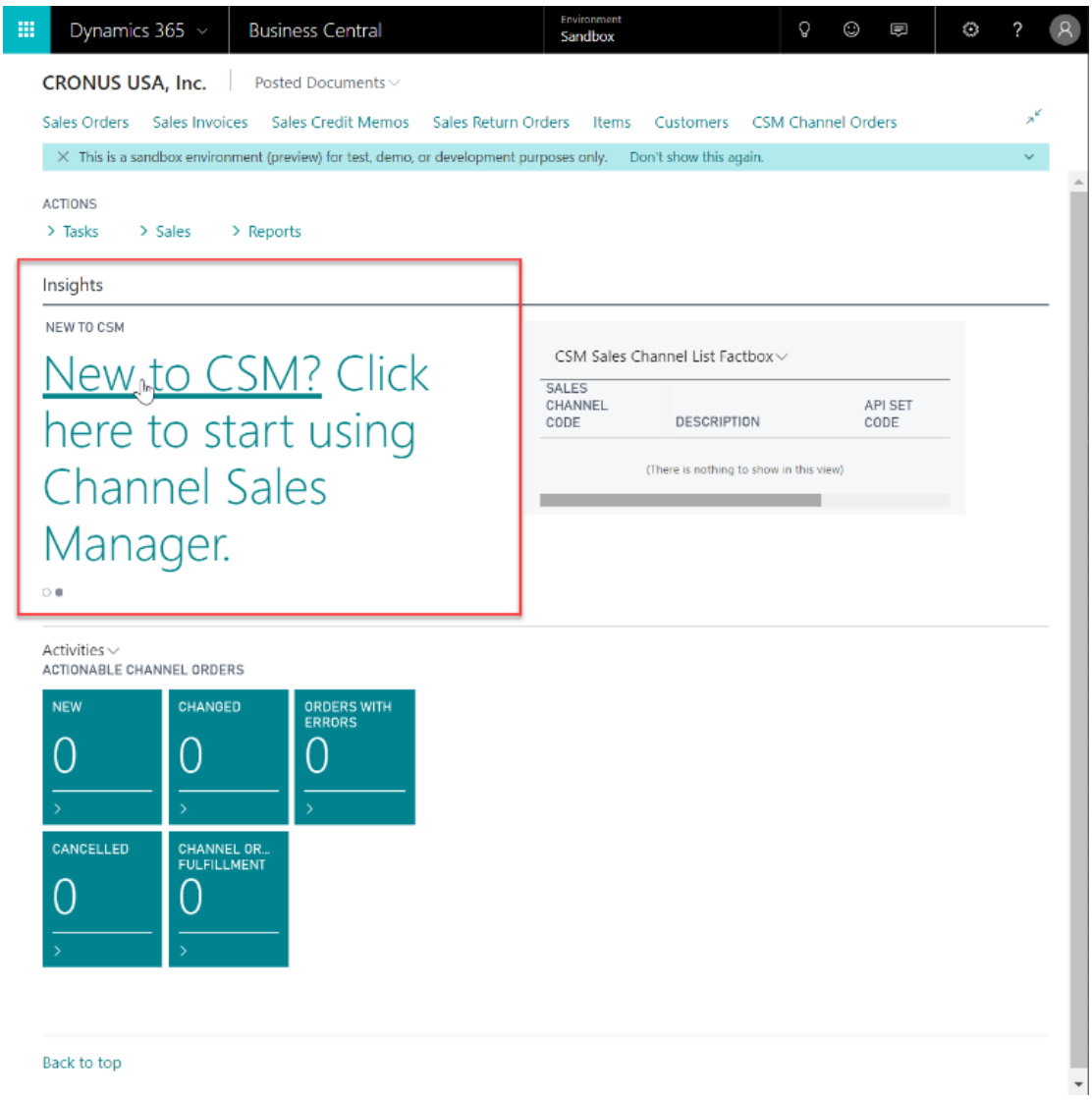
For more info on CSM Role Center refer to CSM Role Center Headlines.

CSM Setup

To initially setup CSM for Amazon, you first need to load the API and Sales Channel Data for your Amazon Seller Central Account. This should take 5 minutes or less.

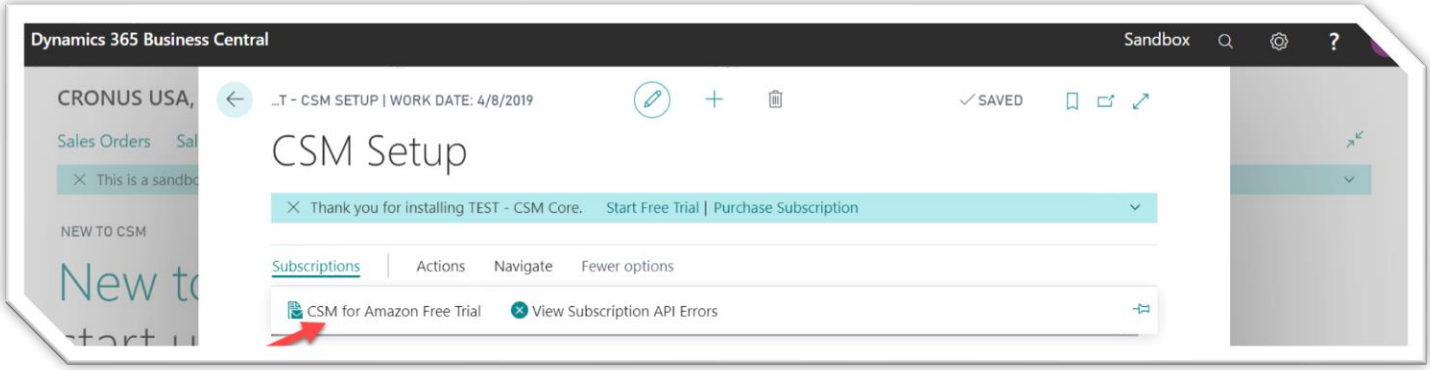
First, you need to navigate to CSM Setup. First, you need to navigate to the CSM Setup page. You can access this page in the following ways:

- You can search for CSM Setup by pressing the light bulb and entering “CSM Setup.”
- From the CSM Administrator Role Center, chose the “CSM” action, then select the “CSM Setup” option.
- Wait for the CSM Administrator Role Center Insights pane to display “New to CSM?” and click the hyperlink.



Creating and Managing Your CSM Subscription

If CSM for Amazon is your first CSM product, it is necessary to create a new CSM subscription. CSM uses Stripe as its subscription and payment management service, but the process of setting up a new subscription can be performed from the CSM Setup page within Business Central. On the Registration and Billing Information FastTab, you must enter a company name, contact e-mail, address, and phone number information, then choose the Subscriptions ribbon and select the CSM for Amazon Free Trial action.



If you have failed to supply any necessary information, an error message will inform you of what data you need to include. If all the required values are present, a new CSM subscription management account will be set up for you in Stripe. As part of this setup, a new customer ID is generated; this ID is displayed in the corresponding field on the CSM Setup page.

> ***Note:*** *while CSM's subscription management functionality will validate whether all of the required fields have been populated when a subscription is requested, it will not validate the information itself. Please be certain the values you enter in these fields are accurate.*

When you have successfully requested a trial subscription, the relevant subscription status fields on the CSM Setup page are updated to present the remaining length of the trial subscription. CSM products by default allow for a 30 day trial period, during which you have access to the full functionality of CSM for Amazon. If you wish to use CSM for Amazon following the trial period, you must activate your subscription by providing a valid payment method. You can supply a payment method and manage other aspects of your CSM subscriptions through the Suite Engine Subscription Self Service Portal, which is accessed from the CSM Setup page by choosing the Process ribbon and then choosing the Go To Payment Portal action. This opens the Suite Engine Subscription Self Service Portal for the assigned customer ID. The portal presents information on CSM for Amazon and any other Suite Engine solution subscriptions that have been set up under the same account; from here, you can add payment methods and make adjustments to your existing subscriptions.

If CSM for Amazon is being installed in a Business Central environment in which other CSM solutions have been deployed, the trial subscription will be created for the customer ID subscription account that is already assigned in Business Central. However, there may be situations where a Suite Engine subscription account exists but no account details are present in Business Central. A common example of this occurs is when a company is working with separate Business Central test/sandbox and live/production environments. In such a scenario, it is necessary to apply the same subscription to both environments, rather than create (and pay for) two separate subscriptions. It is possible to link a

Business Central environment to an existing subscription account by choosing the **Link to Existing Customer** action on the **Actions** tab in the ribbon. In the **Link Existing Customer** page, you must enter the following information:

- Customer ID
- Billing E-Mail
- Address (Address 1 only, information such as city and postal code is unnecessary)

These values can all be obtained from Stripe. When this information is supplied, the application will automatically assign the proper CSM subscription account in Business Central and then update this account to include CSM for Amazon.

After the initial entry of billing details on the CSM Setup page, these values become uneditable. If it is necessary to modify any of this information, you can do so on the Suite Engine Subscriptions page. This page presents customer information and details about all Suite Engine products that have been licensed under the customer account. To change value such as the customer name, address, e-mail, and phone number, choose the Edit Customer Information action in the ribbon. This will open a separate window containing the existing customer values, which can then be edited. Changes that are made to a customer's information will be automatically synchronized with the related CSM subscription account in Stripe.

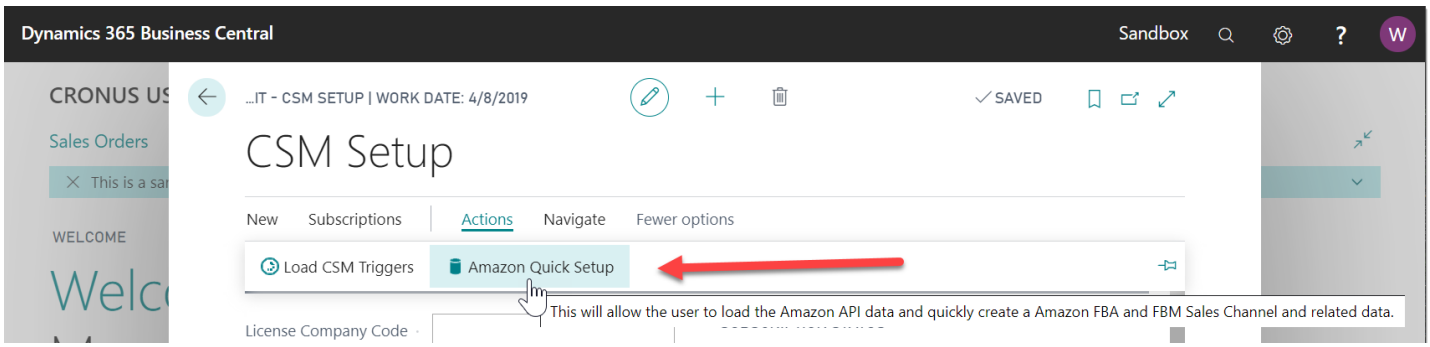
It is also possible to make adjustments to a subscription account's information through Stripe. In such an instance, it is necessary to open the Suite Engine Subscriptions page in Business Central, then choose the Actions ribbon and choose the Force Refresh action to instruct CSM to obtain the updated information from Stripe.

The CSM for Amazon Setup Wizard

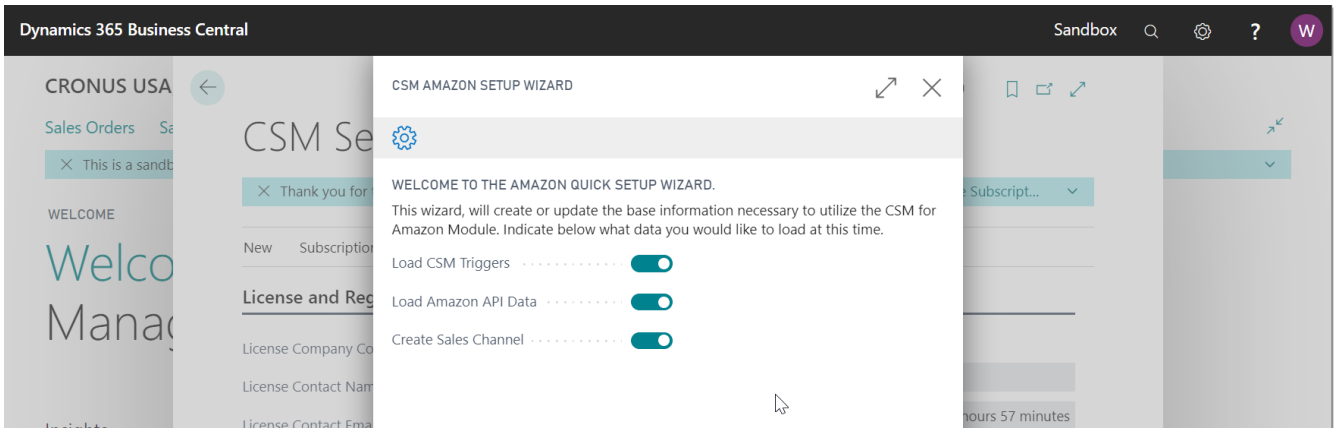
Once you have set up a trial subscription, you are ready to set up your CSM for Amazon solution. To assist you in the creation of your primary sale channel, CSM for Amazon includes a setup wizard that streamlines the setup process.

> ***Note:*** *if your online retail business is comprised of multiple marketplaces, and you want to create a separate CSM sales channel for each one, it is recommended that you manually set them up. This will ensure that the credentials you established during the setup of your primary sales channel are not inadvertently overridden or deleted.*

Select Actions -> Amazon Quick Setup.

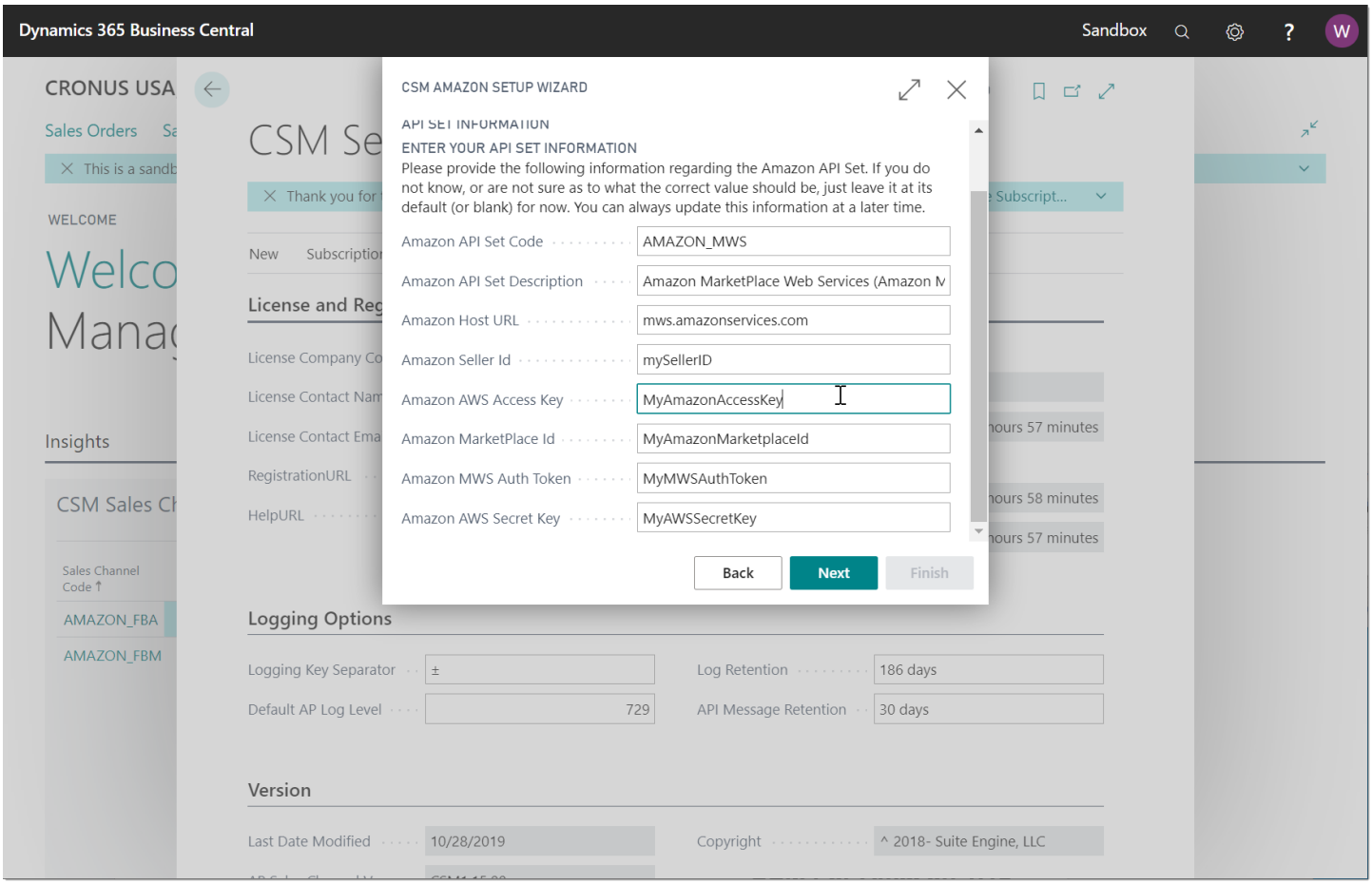


This will start the Amazon Setup Wizard.



On the first page of the wizard, in the **Web Service Type** field, use the dropdown to indicate whether your Amazon platform utilizes the modern SPI-API set or the legacy MWS API suite (see here for more information on these API sets). After you have specified the web service type, it is recommended you enable all presented setup options for loading CSM triggers and Amazon API data, as well as creating a new sales channel in Business Central. When you are done making these selections, choose the **Next** button.

On the second page of the wizard, you can specify information about the API set you are using to facilitate communications between Business Central and your external channel platform.

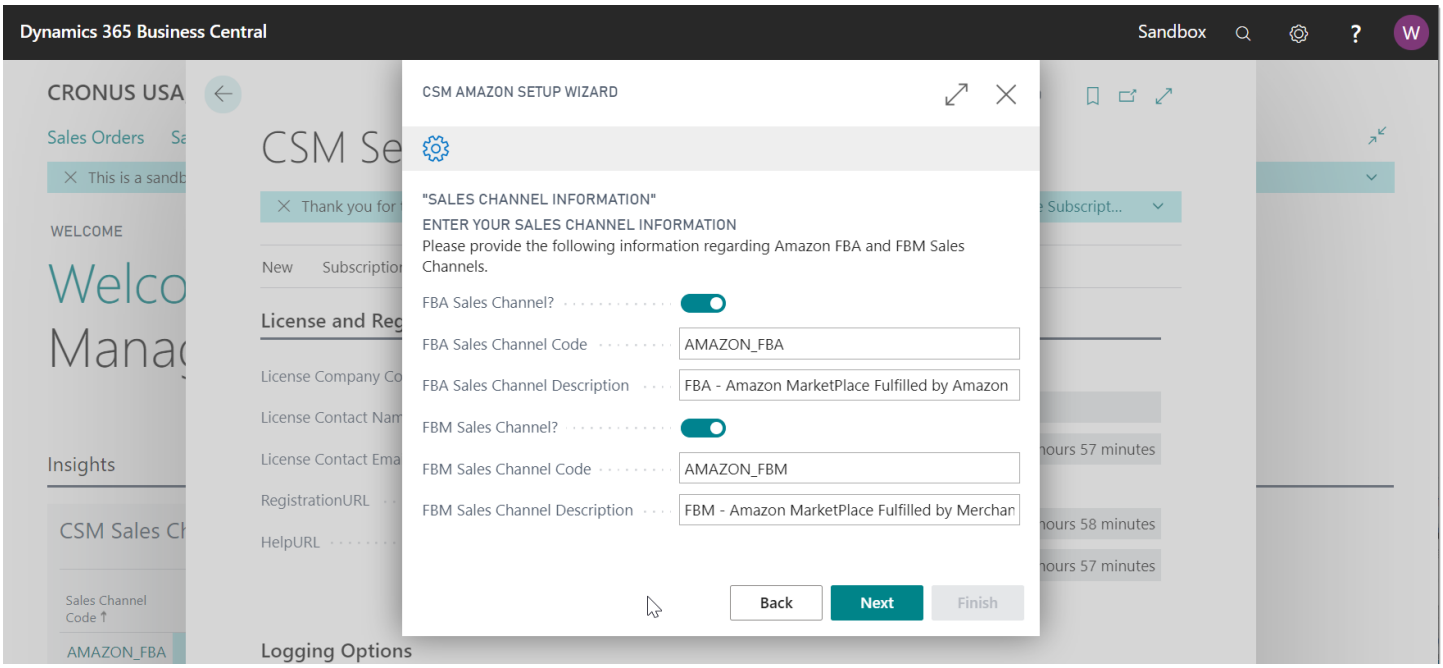


The specific configuration field options will be determined by the web service type that you selected on the previous wizard page:

Field	Description	API Type	Example Value
Amazon API Set Code	This is unique code that identifies the API set. It can be any value you wish, but we recommend naming it something meaningful that describes the external source the API set communicates with.	Both	Amazon_SPAPI
Amazon API Set Description	This is a text description of the API set. It can be any value you wish, but we recommend using a meaningful description. Note, that you may deal with other channels in the future (Shopify, Magento, etc.).	Both	Amazon Selling Partner API (Amazon SPAPI)
Amazon MarketPlace ID	This is the marketplace ID for your Amazon storefront. You can obtain this value by your Amazon storefront or any of the products you list on Amazon in a browser. If you review the URL, you will notice a segment that reads "&marketplaceID=" followed by an alphanumeric value. That alphanumeric value is your marketplace ID for that storefront.	Both	
Amazon Seller ID	This is your Amazon merchant token. You can obtain this value from your Amazon Seller Central account by opening your Account Info page, then choosing the Merchant Token option in the Business Information section.	Both	

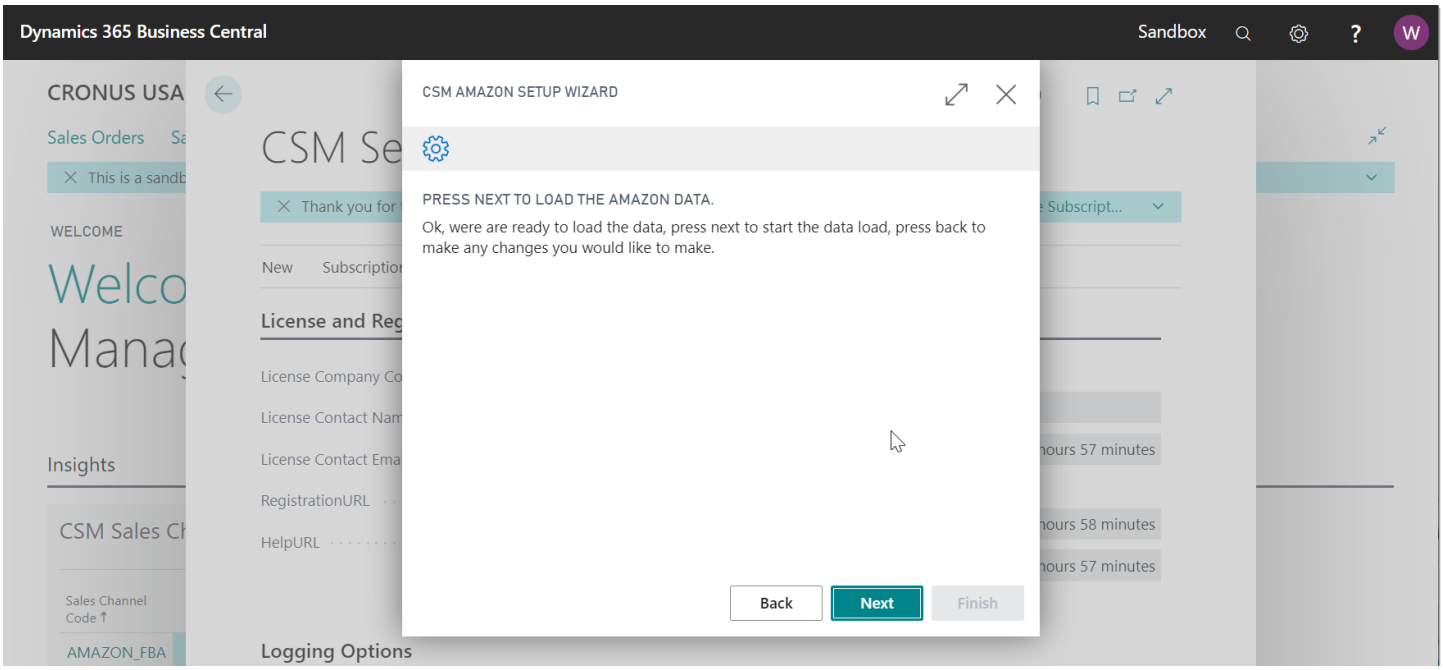
Field	Description	API Type	Example Value
Amazon Host URL	This is the host URL endpoint Amazon Marketplace Web Services (MWS). Normally it is mws.amazonservices.com	MWS	mws.amazonservices.com
Amazon AWS Access Key	You can request credentials on Amazon Seller Central. This is the AWS Access Key they give you when authorized to use MWS.	MWS	
Amazon MWS Auth Token	You can request credentials on Amazon Seller Central. This is the MWS Auth Token they give you when authorized to use MWS.	MWS	
Amazon AWS Secret Key	You can request credentials on Amazon Seller Central. This is the AWS Secret Key they give you when authorized to use MWS.	MWS	
Amazon Access Key ID	You can request credentials on Amazon Seller Central. This is the Access Key they give you when authorized to use SP-API.	SP-API	
Amazon Secret Key	You can request credentials on Amazon Seller Central. This is the Secret Key they give you when authorized to use SP-API.	SP-API	
Amazon Client ID / Amazon Client Secret	Amazon Device Messaging (Amazon's service that manages the transmission of messages to and from Amazon) requires OAuth credentials that verify your server's identity. These credentials exist in the form of a Client ID and Client Secret Key. You can obtain these credentials from your Amazon developer portal account by opening the Security Profile Management area and then choosing the Web Settings tab.	SP-API	
Amazon Role ARN	Your Amazon Resource Name (ARN) is a role that manages identity and access policies, API calls, and other services.	SP-API	
Amazon Role ARN Version	Your Amazon Resource Name (ARN) may include a version number as a qualifier to more fully identify the role. If this qualifier has been established, it should be entered here.	SP-API	
Amazon Refresh Token	Enter your Amazon refresh token, which is used by CSM to request new access tokens as needed.	SP-API	
AWS Region	Your Amazon seller environment is hosted in a particular region, which can be specified here. By default, CSM for Amazon supports AWS servers in eastern and western North America, as well as western Europe.	SP-API	

On the third page of the wizard, you will specify how you want to identify FBA vs. FBM Sales Channels.



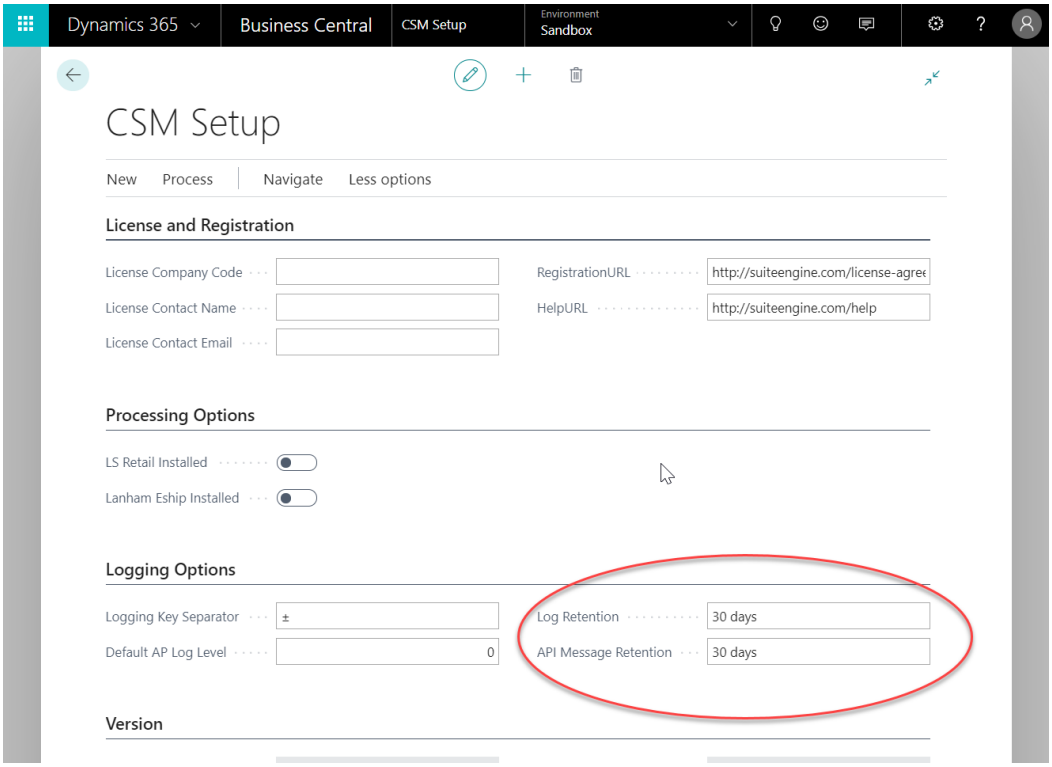
Field	Description	Example Value
Code	This is unique code that identifies the Sales Channel. It can be any value you wish, but we recommend naming it something meaningful that describes the Sales Channel.	Amazon_FBA
Description	This is a text description of the Sales Channel.	FBA - Amazon MarketPlace Fulfilled by Amazon

The fourth page of the wizard is a confirmation page. Choose the **Next** button to instruct CSM to load and configure the Amazon channel. You can choose the **Back** button if you need to make changes to any entered settings.



Press “Finish” on the Final Page and the Wizard will close.

There are two values on the CSM Setup page that you should set. These determine how long API message information and logs are retained. For more information on how API messages and processing log entries are used to troubleshoot CSM activities, please see here.



Close the CSM Setup page and you should return to the CSM Role Center.

Obtain Channel Credentials in Amazon

To obtain credentials for CSM Amazon you must register as a developer. It is recommended that you complete this before moving to any other steps throughout this process. Credentials cannot be shared. End-users will need to register themselves as a developer to get the proper credentials. To get the correct links to certain webpages refer to the CSM Amazon Order Management Document.

I. Create an AWS account

Create an AWS account

1. You must have an AWS account because the Selling Partner API security model uses AWS authentication credentials. If you're not already an AWS customer, you can create a free AWS account. For more information, refer to AWS Free Tier.
2. On the AWS account page, click the Create a Free Account button.
3. Enter in an email address. From there, an email will be sent with a verification code. You will enter that code into the AWS account page.

4. Next, you will be required to fill in your contact information in all the fields. Remember to agree to the terms and conditions at the bottom of the page.
5. You will be required to fill in your credit card/billing information in all the fields.

Complete the sign-in process according to Amazon's direction.

II. Create an IAM user

Create an IAM user to get AWS keys to authenticate calls to the Selling Partner API. We recommend creating a new IAM user exclusively for this purpose.

Use the following procedure to create an IAM user

1. Sign into the AWS Management Console, and then open the IAM console at console.aws.amazon.com/iam.
2. From the left navigation pane, choose **Users** and then select **Add user**.
3. Enter a username.
4. Select **Programmatic access** and then choose **Next: Permissions**.
5. On the **Set Permissions** page, accept the defaults and then choose **Next: Tags.** You will set permissions when you create an IAM role.
6. On the **Add tags (optional)** page, add any desired tags, and then choose **Next: Review**.
7. On the **Review** page, ignore the **This user has no permissions** warning. You will set permissions when you create an IAM role.
8. Select **Create user**.
9. Choose **Show** to view the AWS secret access key. To save the AWS access key, select **Download .csv**, and then save the file to a safe location.

Important!

This is your only opportunity to view or download your AWS secret access key, which you must use to authenticate your calls to the Selling Partner API. Save the AWS access key ID and AWS secret access key in a safe and secure place.

You will not have access to the AWS access key again after this step.

If you lose your AWS secret access key you must create a new IAM user with a new set of keys.

10. Choose **Close**.
11. In the **Username** column, select your new IAM user and record the User ARN. You will use the ARN in Create an IAM role.

For more information about creating IAM users, refer to Creating an IAM User in Your AWS Account in the AWS documentation.

Complete this process according to Amazon's direction.

III. Create an IAM policy

This IAM policy defines the permissions required to make calls to the Selling Partner API. Attach this policy to the IAM role that you create in Create an IAM role.

Note: If your AWS account leverages AWS Organizations you must ensure that your organization level policy allows access to the Selling Partner API. For more information, refer to Managing AWS Organizations policies in the AWS documentation.

Use the following procedure to create an IAM policy

1. Sign in to the AWS Management Console, and then open the IAM console at console.aws.amazon.com/iam.
2. From the left navigation pane, select **Policies**.

If this is your first time choosing **Policies**, the **Welcome to Managed Policies** page appears. Choose **Get Started**.

3. Select **Create policy**.
4. Choose the **JSON** tab.
5. Paste the following code into the text box (replacing the existing code), and then choose **Next: Tags**.

```
{
 "Version": "2012-10-17",
 "Statement": [
  {
   "Effect": "Allow",
   "Action": "execute-api:Invoke",
   "Resource": "arn:aws:execute-api:*:*:*"
  }
 ]
}
```

6. On the **Add tags (Optional)** page, add any desired tags, then choose **Next: Review**.

7. On the **Review policy** page, enter a **Name** and a **Description** (optional) for the policy that you are creating. We recommend naming your IAM policy, SellingPartnerAPI.
8. Review the policy **Summary**, then choose **Create policy**.

Complete this process according to Amazon's direction.

IV. Create an IAM role

Create an IAM role that trusts the IAM user that you created in Step 2. Create an IAM user and has permissions to call the Selling Partner API.

Use the following procedure to create an IAM role

1. Sign in to the AWS Management Console, and then open the IAM console at console.aws.amazon.com/iam.
2. From the left navigation pane, select **Roles** and then choose **Create role**.
3. On the **Create role** page, choose **Another AWS account**.
4. In the **Account ID** box, enter the account identifier for the AWS account where you created your IAM user in Step 2. Create an IAM user. The account identifier is the 12 digit number in the User ARN. Then, choose **Next: Permissions**.
5. On the **Attach permissions policies** page, under **Policy name**, select the policy that you created in Step 3. Create an IAM policy, and then choose **Next: Tags.**

Tip: Choose **Filter policies** and then select **Customer managed** to narrow your choices.

6. On the **Create role** page, enter a role name in the **Role name** box, an optional role description in the **Role description** box, and then choose **Create role**.
7. Under **Role name**, select the name of your new role.
8. On the **Add tags (optional)** page, add any custom tags, then choose **Next: Review**.
9. On the **Summary** page, save your role ARN. You must have the role ARN for the following tasks:
    i. Register your application.
    ii. Add an AWS Security Token Service policy to your IAM user.

Complete this process according to Amazon's direction.

V. Add an AWS Security Token Service (AWS STS) policy to your IAM user

Adding an AWS Security Token Service (AWS STS) policy to your IAM use allows you to request temporary AWS access keys that you can use to authenticate your requests to the Selling Partner API. These credentials expire after a set period of time, which helps you to control access to your AWS resources.

1. Sign into the AWS Management Console, and then open the IAM console at console.aws.amazon.com/iam.
2. From the left navigation pane, select **Users** and then choose the user that requires the AWS STS policy. In this tutorial, choose the user you created in Create an IAM user.
3. On the **Permissions** tab, choose **Add inline policy**.
4. On the **Create policy** page, choose **Choose a service**.
5. Select the **STS** service.

Tip: Enter **STS** in the search box to narrow your choices.

6. Under **Access Level**, select the arrow next to **Write**.
7. Select **AssumeRole**.
8. Select the arrow next to **Resources**, and then choose **Add ARN**.
9. In the **Add ARN(s)** dialog box, enter the role ARN from Step 4. Create an IAM role, choose **Add**, and then choose **Review policy**.
10. On the **Review policy** page, enter a name for your policy. Review your setting, then choose **Create policy**.

To register your application (for all public applications and private seller applications)

1. Sign into Seller Central using the credentials that you used to register as a developer.
2. In the **Partner Network** menu, click **Develop Apps**.

The **Developer Central** page appears.

3. Click **Add new app client**.

The **App registration** page appears.

4. Complete the form.

Note. If you are registering a public application, a **Sellers** check box and a **Vendors** check box appear after you choose the API type. Select **Sellers**, **Vendors**, or both, depending on the type of selling partner your application is for. The list of roles for which you can apply vary depending on your selection.

VI. Register your application

To register your application (for private vendor applications)

1. Sign into Vendor Central with the credentials that you used to register as a developer.
2. In the **Integration** menu, click **API Integration**.

The **Developer Central** page appears.

3. Click **Add new app client**.

The **App registration** page appears.

4. Complete the form.

Important!

When registering your application, the IAM ARN that you provide must be for the IAM entity to which you attached the IAM policy from Create an IAM policy.

In this workflow, that IAM entity is the IAM role from Create an IAM role.

If you register your application using your IAM user, be sure that the IAM policy is attached to it. Otherwise your calls to the Selling Partner API will fail.

We recommend registering your application using an IAM role, as shown in this workflow, to help you better control access to your AWS resources.

VII. Viewing your application information and credentials

To view your application information and credentials (for private seller applications and for public applications for any type of selling partner)

1. Sign into Seller Central using the credentials that you used to register as a developer.
2. In the **Partner Network** menu, click **Develop Apps**.

The **Developer Central** page displays information about your application(s), including the IAM ARN associated with them.

3. Click **View** under **LWA credentials** for the application you want.

Your LWA client identifier and client secret for that application appear. You will need these credentials to request an LWA access token. For more information, see Request a Login with Amazon access token.

To view your application information and credentials (for private vendor applications)

1. Sign into Vendor Central with the credentials that you used when you registered as a developer.
2. In the **Integration** menu, click **API Integration**.

The **Developer Central** page displays information about your application(s), including the IAM ARN associated with them.

3. Click **View** under **LWA credentials** for the application you want.

Your LWA client identifier and client secret for that application appear. You will need these credentials to request an LWA access token. Complete this process according to Amazon's direction.

Enter Channel Credentials in Business Central

The credentials that you entered in the setup wizard are used to validate requests to send data between Business Central and an external channel environment. Certain API calls are performed against specific sales channel records, and require the presence of credentials at the sales channel record level. In some scenarios, it may be that an organization has multiple sales channels that all use the same credentials. In such a scenario, it is possible to define credentials for one sales channel, then define that channel as the "credentialing sales channel" for other sales channels. When an API call is made against a sales channel, CSM will use the credentials that exist for the channel's defined credentialing sales channel to validate that API process. In this way, CSM users do not have to maintain access credentials for every sales channel that is set up in Business Central.

Note that the need to share credentials across multiple channels may vary according to your business. Consider the following examples:

- **Scenario 1:** You have a United States presence in 15 states, and have defined a separate sales channel for each state. In this scenario, you may have a single set of credentials that you wish to apply to all 15 channels. In such a scenario, you set up the credentials for your Georgia channel, then make the Georgia channel your credentialing channel for your channels in Florida, Texas, etc. When you process an API activity through your Florida channel, for example, the credentials that have been set up for Georgia will be used.
- **Scenario 2:** You have a North American and a European presence, with a separate sales channel in each region. In this case, you may have two separate sets of credentials for North America versus Europe. In such a scenario, you assign these separate credentials to each of these channels.

The credentials that you entered in the setup wizard are used to validate requests to send data between Business Central and an external channel environment.

Certain API calls are performed against specific sales channel records and require the presence of credentials at the sales channel record level. In some scenarios, it may be that an organization has multiple sales channels that all use the same credentials.

When an API call is made against a sales channel, CSM will use the credentials that exist for the channel's defined credentialing sales channel to validate that API process.

In this way, CSM users do not have to maintain access credentials for every sales channel that is set up in Business Central.

1. Login to Business Central, once you have completed necessary steps for the CSM Initial Setup proceed to the **CSM Amazon Setup Wizard**.
2. To do this click **CSM Setup**, in the navigation ribbon click **Actions**> **Amazon Quick Setup**.
3. The CSM Amazon Setup Wizard should appear. From there, for the **Web Service Type** select the **SPAPI**.
4. For the Boolean fields toggle the following to **enabled**:
    - Load CSM Triggers
    - Load Amazon API Data
    - Create Sales Channel

Then click **Next**.

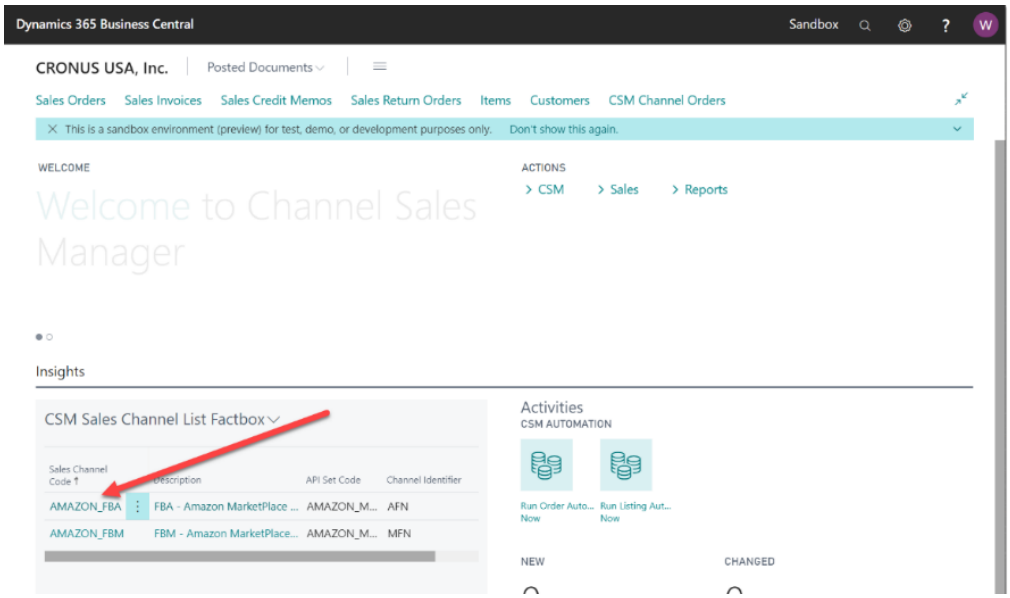
5. For the 2nd window in the CSM Amazon Setup Wizard, this is where you fill in all the credentials saved from the obtaining Amazon credential video segment.
6. The following credentials that have been provided:
    - Amazon Access Key ID
    - Amazon Secret Key
    - Amazon Client ID
    - Amazon Client Key
    - Amazon Role ARN
    - Amazon Role ARN Version
    - Amazon Seller ID
    - Amazon Marketplace ID
    - Amazon Refresh Token
    - AWS Region

Once all the fields listed above are filled in click **Next**.

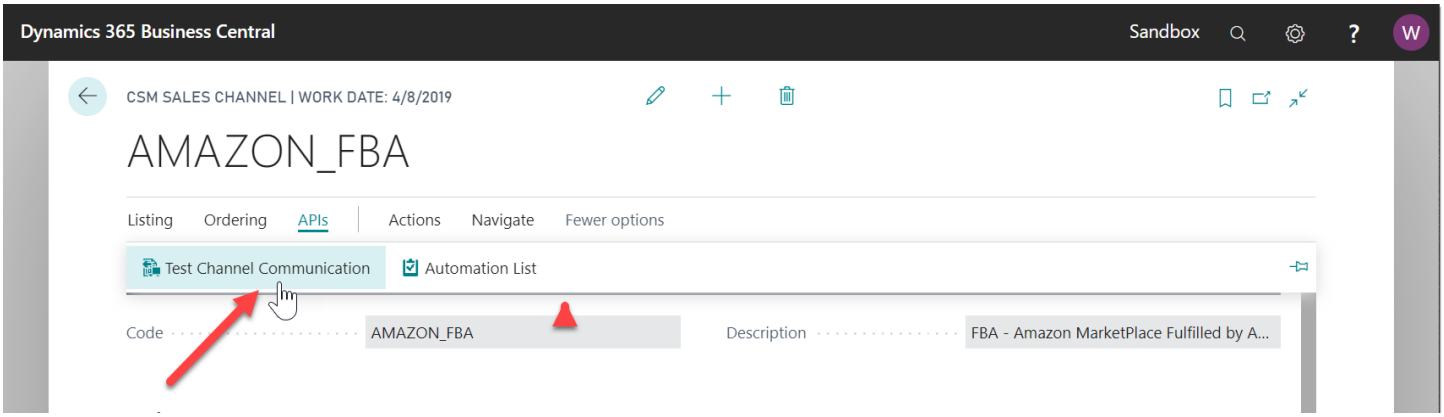
7. For the 3rd window in the CSM Amazon Setup Wizard, this is where you establish the Sales Channel Information in Business Central. Then click **Next**.
8. To verify that the **Sales Channel Code** that was created is correct, you view this on the main page.
9. To verify that all credential fields are correct you can view this by searching **API Credentials**.
10. If you run into an issue of having the old credentials still appear in Business Central, then you can simply copy & paste the current credentials established in previous steps. This can be done within the **API Credentials** card under **AWS Signature**.

Verify Channel Connectivity and Retrieve Your First Channel Orders

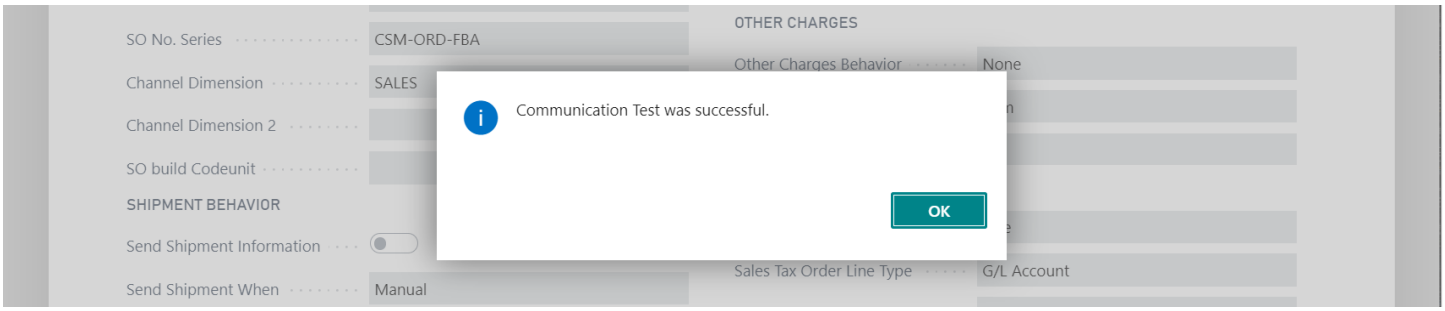
At this point in time, you should be able to conduct a small communication test. After returning to the role center, select one of the new Amazon Sales Channels that the setup wizard created (FBA or FBM).



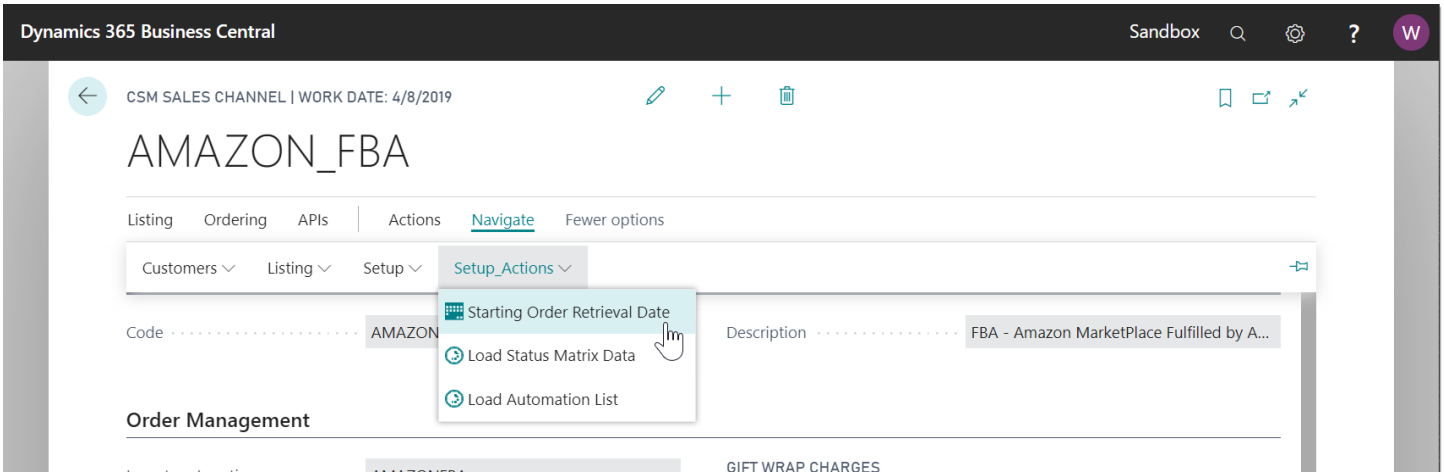
Next, select APIs, then Test Channel Communication.



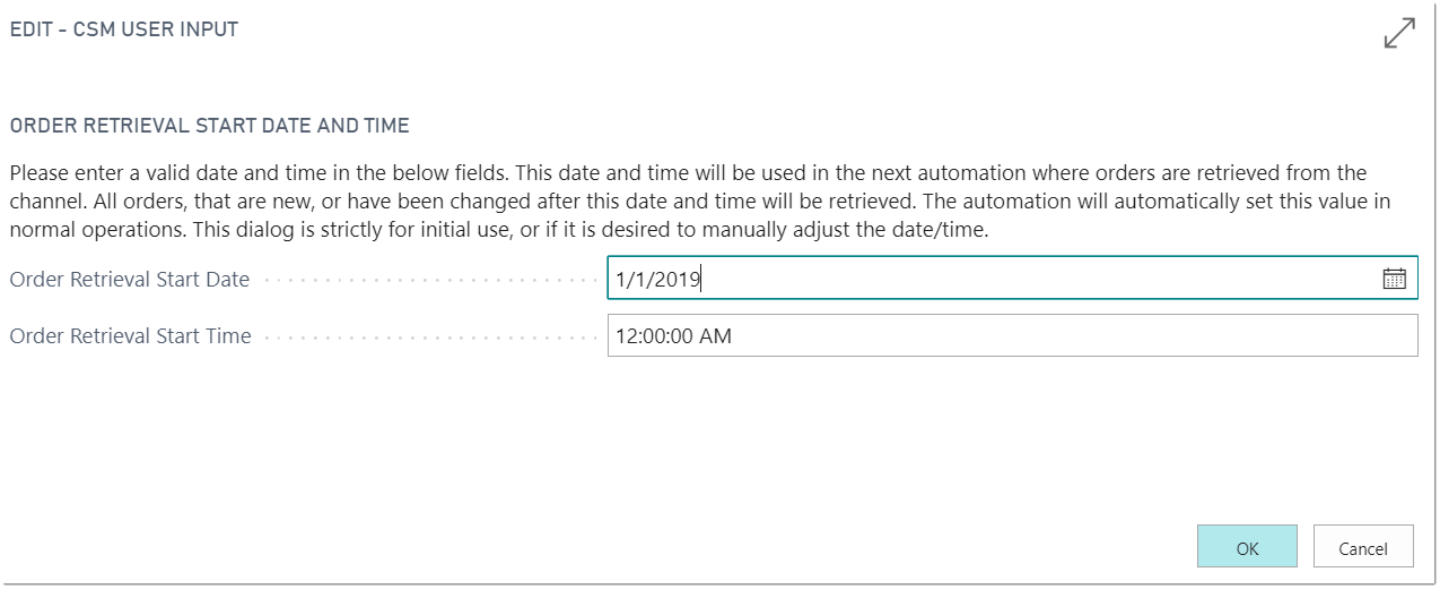
The channel communications test confirms that CSM can properly retrieve your Amazon access token as well as complete an API call between Amazon and Business Central.



Next, you will want to set the time and date starting point for order retrieval. The date you enter, will cause CSM to ask Amazon for all order information that has been added, or has changed since the time and date you enter. After that point, CSM will automatically update this time and date to ensure that there are no gaps in the communication. To Set the starting Order Retrieval Start time and date, press Navigate, Setup Actions and choose Starting Order Retrieval Date:



The Starting Date and Time dialog will then appear.



Enter your desired starting date and time for order retrieval, then you are all set to download orders.

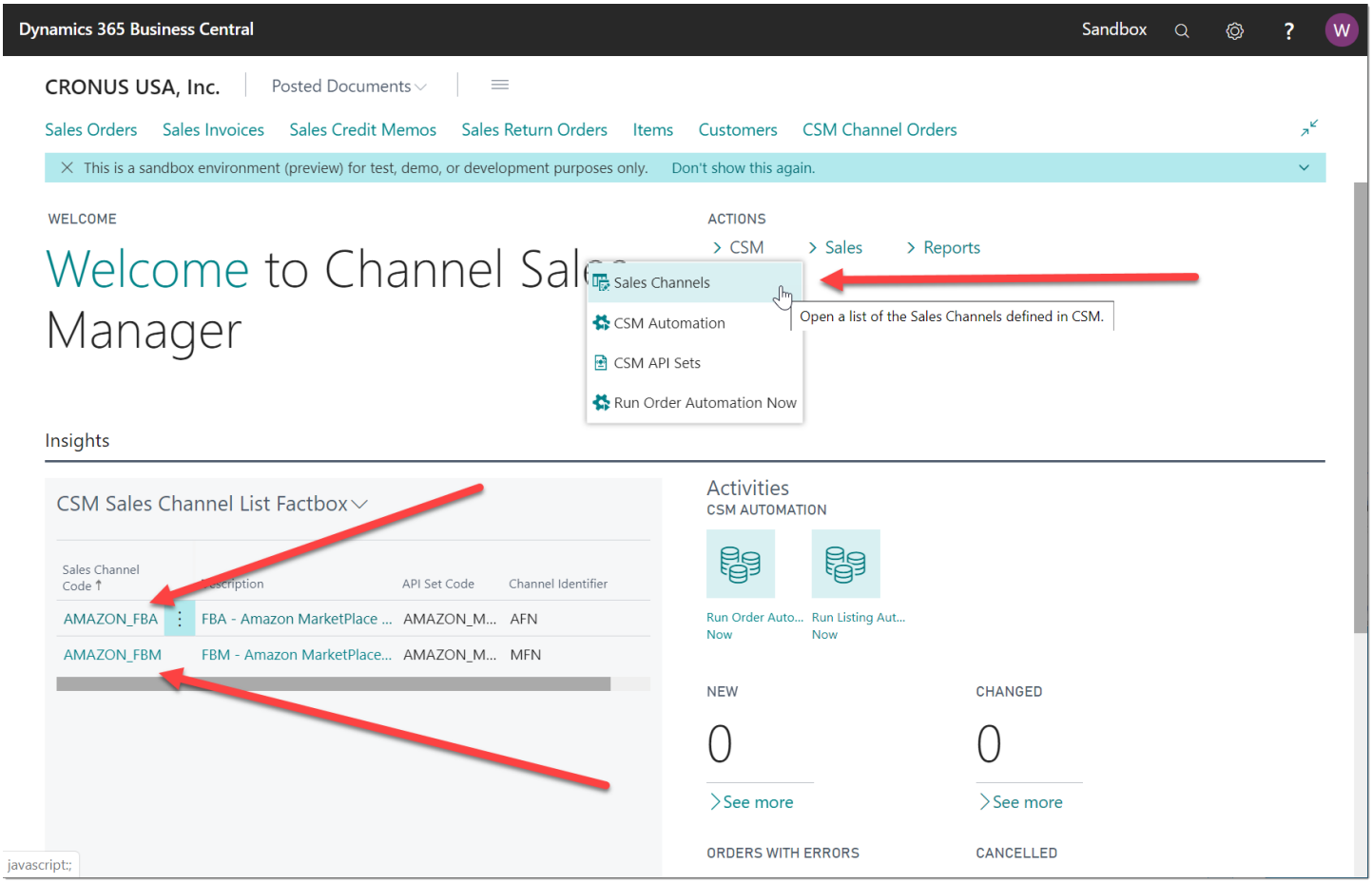
CSM Functional Settings and Cross References

This section will go thru the settings that will customize your CSM experience and cross reference your data in Business Central to like data in Amazon, such as shipping methods, payment types, and customer price groups.

CSM Sales Channel

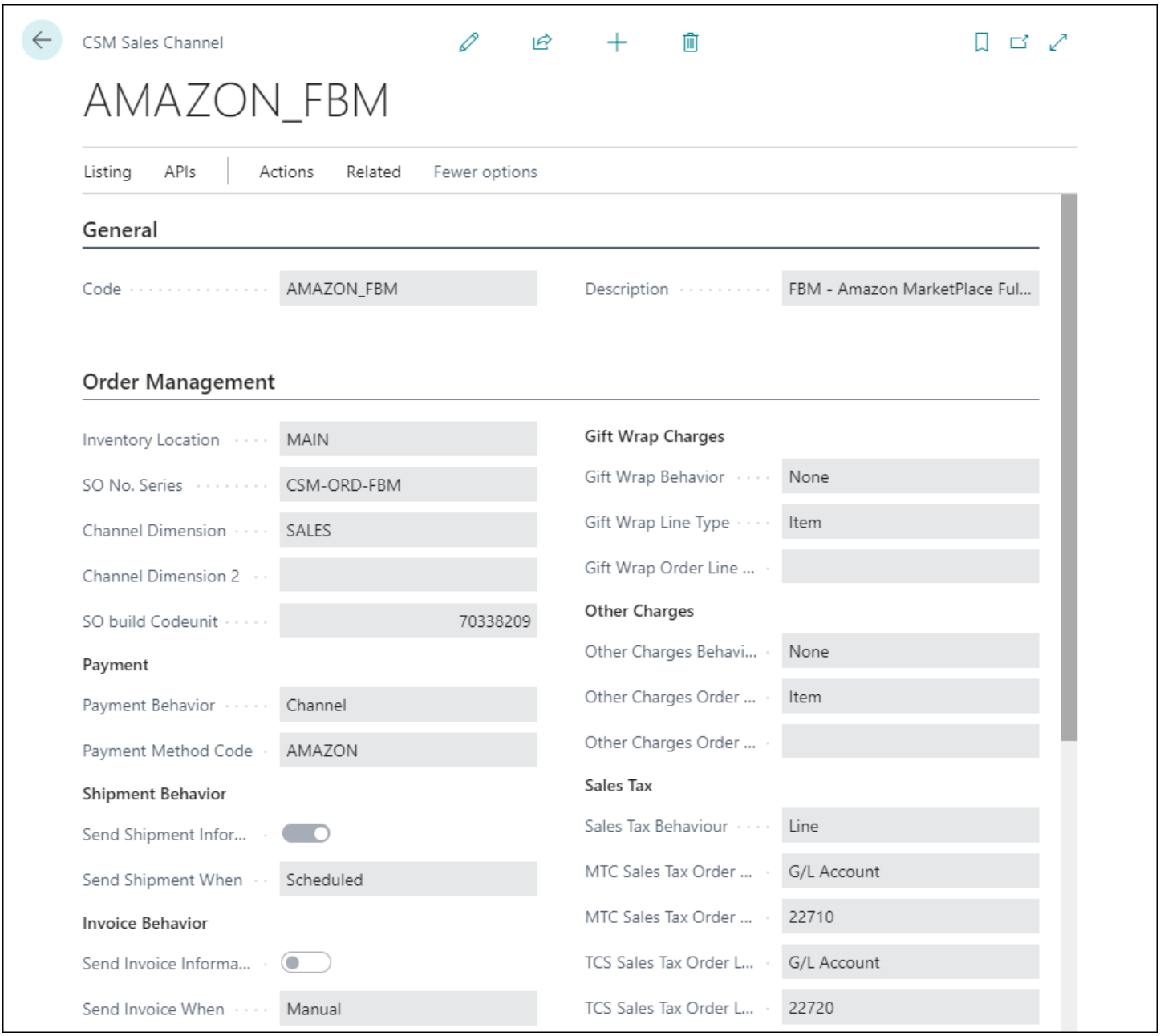
Sales Channels are the heart of CSM; most user interaction centers around a Sales Channel. Think of a Sales Channel as an e-commerce or marketplace store. By default, CSM for Amazon sets up a Sales Channel foe FBA, and another for FBM.

You can open the Sales Channel Card, directly from the CSM Sales Channel List FactBox, or see a list of all CSM Sales Channels from the Actions > Tasks menu.



If you want to create a new Sales Channel, simply press the + New button on the CSM Sales Channel list screen.

Here is a walk-through of the data on the Sales Channel card that is used by Order Management.



General FastTab		
Field	Description	Example Value
Code	This is unique code that identifies the Sales Channel. It can be any value you wish, but we recommend naming it something meaningful that describes the Sales Channel.	AMAZON_FBM
Description	This is a text description of the Sales Channel.	Amazon Retail Store (B2C) FBM - Amazon MarketPlace Fulfilled by Merchant

Order Management FastTab		
Field	Description	Example Value
Inventory Location	The NAV inventory location that supplies this store. NAV Sales Orders Created for this Sales Channel will specify this inventory location. Listing Management will also use this value in its inventory availability calculation. For the Amazon FBA Location, you have probably setup an Inventory Location to represent what inventory is located in Amazon Warehouses.	BLUE
Payment Behavior	Indicates how this sales channel processes payments. **For Amazon Sales Channels, this should be set to Channel**. Amazon Sales Channel will use Channel since all Amazon Orders pay the merchant the same way.	Channel
Payment Method Code	The Code of the Business Central Payment Method which should be used. For Payment Behavior: Channel, this will be the Payment method used on all orders. Tip: You should set up a Business Central Payment Method for Amounts Due From Amazon.	AMAZON
SO No. Series	The No. Series that should be used for Sales Order Number when build NAV Sales Orders for this Sales Channel.	CSM-ORD-FBM
Channel Dimension	If populated, this NAV Financial Dimension will be set on all NAV Sales Orders created from this Sales Channel. Primary Dimension 1.	SALES
Channel Dimension 2	If populated, this NAV Financial Dimension will be set on all NAV Sales Orders created from this Sales Channel. Primary Dimension 2.	
SO No. Series	The Object number of the Codeunit that should create NAV Sales Orders. By default, this should be 70338209 which is the supplied CSM functionality to build Sales Orders. You can however customize the functionality by creating a new Codeunit and specifying its number here. It is recommended that you keep the default value.	70338209
Send Shipment Information	Indicates whether CSM should send shipment information to the Channel. For the FBM Sales Channel, you might choose to set this to Yes. For the FBA Sales Channel, you should always select, No.	Yes
Send Shipment When	If CSM is sending Shipment information, this field tells CSM when to send it. Immediate: When the Shipment is posted; Scheduled: Shipment information will be queued and sent by the CSM automation (this assumes that the automation is setup properly to send	Scheduled

	shipment information); Manual: Shipment information is sent by a user who presses the Send Shipment Information action button on the Channel Order card. We recommend for Amazon that this be set to Scheduled, as Amazon has a limit on the number of messages processed in a period of time. When CSM sends shipment information to Amazon on a Scheduled basis, it gathers shipment information from all orders and sends in one message.	
Send Invoice Information	Indicates whether CSM should send invoice information to the Channel. Always No for All Amazon Sales Channels.	No
Send Invoice When	If CSM is sending Invoice information, this field tells CSM when to send it. Immediate: When the invoice is posted; Scheduled: Invoice information will be queued and sent by the CSM automation (this assumes that the automation is setup properly to send invoice information); Manual: Invoice information is sent by a user who presses the Send Invoice Information action button on the Channel Order card. Set this to Manual for All Amazon Sales Channels.	Manual
Send Invoice Capture	Always Off (or false) for Amazon.	True
Return Order Behavior fields	The **Send Return Order Information** and **Send Return Order When** fields exist to support return functionality that has not yet been developed for Amazon, and these fields can be ignored for your Amazon channels.	N/A
Return Receipt Behavior fields	The **Send Return Rcpt. Information** and **Send Return Rcpt. Information When** fields exist to support return functionality that has not yet been developed for Amazon, and these fields can be ignored for your Amazon channels.	N/A
Refund Cr. Memo Behavior fields	The **Send Refund Cr. Memo** and **Send Refund Cr. Memo When** fields exist to support return functionality that has not yet been developed for Amazon, and these fields can be ignored for your Amazon channels.	N/A
Deny Unbalanced Auto Release	It is possible to configure the channel order retrieval automation routine to automatically create and release an associated Business Central sales order as part of the retrieval activity. If this option is enabled, it will override the automation routine's setup if the channel order and sales order have different order total values. CSM will still generate the sales order, but it will not be released. ***Note:*** *this field has been superseded by CSM's sales operation rules feature and will be removed as part of a later release. If you want to enforce this process, it is recommended you use the sales operation rules feature, instead.*	
Deny Unbalanced Auto Post	It is possible to configure the channel order retrieval automation routine to automatically create and post an associated Business Central sales order as part of the retrieval activity. If this option is enabled, it will override the automation routine's setup if the channel order and sales order have different order total values. CSM will still generate the sales order, but it will not be posted. ***Note:*** *this field has been superseded by CSM's sales operation rules feature and will be removed as part of a later release. If you want to enforce this process, it is recommended you use the sales operation rules feature, instead.*	

Address 2 Behavior	Select the method by which address 2 values on Business Central sales orders and customers that are created by CSM are populated. By default, Business Central allows for the definition of address and address 2 values for sales orders and customers. However the CSM orders from which these records are created can retrieve address, address 2, and address 3 values. This is to accommodate eCommerce platforms that allows for three address lines. Due to this discrepancy, it is necessary to indicate how CSM should populate Business Central address 2 fields with retrieved channel data. Options are: • *Combine CSM Address 2 and 3:* CSM will combine a CSM order's address 2 and address 3 values, then assign this combined value as the address 2 for Business Central sales orders and customers. • *Use CSM Order Address 2:* CSM will assign a CSM order's address 2 value as the address 2 for Business Central sales orders and customers. • *Use CSM Order Address 3:* CSM will assign a CSM order's address 3 value as the address 2 for Business Central sales orders and customers.	
Archive After Days	Enter the number of days to retain completed and cancelled CSM Channel Orders before they are moved to the archive. (Example: 2D would keep CSM Channel Orders in the current list for 2 days after being closed or cancelled.	
Auto Channel Order Archive	Use this field to enable and disable automatic archiving for Channel Orders for this Channel.	
Gift Wrap Behavior	This setting tells CSM how it should handle Gift Wrap Charges on orders received from the Channel. If you select None, Gift Wrap Charges will be ignored, use this setting if your Amazon 1.x implementation does not include Gift wrap services. If you select Line, then when CSM creates the NAV Sales Order for an Amazon Order, a Sales Order Line will be added to account for Gift Wrap charge.	
Gift Wrap Line Type	If you choose Line as the Gift Wrap Behavior, this field specifies the Sales Order Line Type which should be used for the Gift Wrap Charge (Revenue from the Customer). The values can be G/L Account, Item, Resource, or Charge (Item).	
Gift Wrap Order Line No.	If you choose Line as the Gift Wrap Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Gift Wrap Line Type chosen).	
Other Charges Behavior	This setting tells CSM how it should handle Other Charges on orders received from the Channel. If you select None, Other Charges will be ignored. If you select Line, then when CSM creates the NAV Sales Order for an Amazon Order, a Sales Order Line will be added to account for Other Charges.	Line
Other Charges Line Type	If you choose Line as the Other Charges Behavior, this field specifies the Sales Order Line Type which should be used for the Other Charges (Revenue from the Customer). The values can be G/L Account, Item, Resource, or Charge (Item).	G/L Account
Other Charges Order Line No.	If you choose Line as the Other Charges Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Other Charges Line Type chosen).	45120

Sales Tax Behavior	Select the method by which calculated sales tax should be handled on sales orders that are created for the channel. Options are: • *None*: Business Central will ignore any sales tax calculations from Amazon. The **Tax Liable** field on the sales order will be enabled or disabled according to standard Business Central logic and sales tax will be calculated in the same manner as any other sales document. • *Line*: sales tax calculations from Amazon will be applied to sales orders in Business Central. The **Tax Liable** field will be disabled (preventing Business Central from calculating sales tax) and a separate order line will be created for each tax amount for order-level charges (such as shipping and gift wrapping) that was calculated by Amazon. It is recommended that you select this option so that recorded sales tax amounts are synchronized between your Business Central and Amazon platforms.	Line
MTC Sales Tax Order Line Type	If you select the *Line* option in the **Sales Tax Behavior** field, indicate the type of account that will be assigned to sales order lines for sales tax collected according to Amazon's Marketplace Tax Collection ("MTC") methodology. The sales tax line type can be a G/L account, item, resource, fixed asset, or item charge. Typically a G/L account is used, but you should select whichever option reflects your desired processes. For more information on how CSM processes sales tax according to Amazon's different tax collection methodologies, see here.	G/L Account
MTC Sales Tax Order Line No.	Select the account (depending on the selected sales tax order line type) that will be assigned to sales order lines for sales tax collected according to Amazon's Marketplace Tax Collection ("MTC") methodology.	A contra G/L account
TCS Sales Tax Order Line Type	If you select the *Line* option in the **Sales Tax Behavior** field, indicate the type of account that will be assigned to sales order lines for sales tax collected according to Amazon's Tax Calculation Services ("TCS") methodology. The sales tax line type can be a G/L account, item, resource, fixed asset, or item charge. Typically a G/L account is used, but you should select whichever option reflects your desired processes. For more information on how CSM processes sales tax according to Amazon's different tax collection methodologies, see here.	G/L Account
TCS Sales Tax Order Line No.	Select the account (depending on the selected sales tax order line type) that will be assigned to sales order lines for sales tax collected according to Amazon's Tax Calculation Services ("TCS") methodology.	A tax liability G/L account

Customers FastTab

Field	Description	Example Value
Customer Template	A valid NAV Customer that CSM should use when dealing with a customer. When Creating customers, CSM will use this customer as a template for the customer's creation. When Sales Channel is chosen as a behavior or New Customers or Guest Customers, CSM will create the Sales Order with this customer and adjust the ship to address to the actual customers information.	CSMTEMPLATE

New Customer Behavior	Indicates how CSM will treat customers for what CSM determines is a new customer. Valid Choices are: Auto Create, Sales Channel, and Manual. For Amazon customers that have not been defined to CSM (either by setting up the customer as a Sales Channel Customer, or receiving a Amazon Order for the customer), CSM considers them a new customer. If the behavior is set to Auto Create, CSM will automatically create a new NAV customer and associated CSM Channel Customer based on the Customer Template defined above, this will occur when CSM builds the NAV Sales Order from the Channel Order. If the behavior is set to Sales Channel, the CSM will not create a new customer, but will build the sales order to the Customer Template customer defined above and change the billing and ship-to addresses directly on the Sales Order appropriately. If the behavior is set to Manual, CSM will not automatically create a customer, and the Sales Order build process will fail unless a Channel Customer is manually setup and linked to a valid NAV customer.	Auto Create
Guest Customer Behavior	Indicates how CSM will treat customers for what CSM determines is a guest customer. Valid Choices are: Auto Create, Sales Channel, and Manual. Some Amazon Customers setup their account to be Anonymous, in this case, CSM will treat these customers as a guest customer.	Auto Create
Auto Create NAV Contact	Indicates whether CSM will also automatically create a NAV contact for any new customers CSM creates.	Yes
Default Customer Group ID.	Not applicable for Amazon Sales Channels.	
New Customer No. Series	Indicates which No. Series should be used when CSM automatically creates a new NAV customer.	CSM-CUST

Amazon Seller and API Data FastTab

Field	Description	Example Value
Credentialing Sales Channel	Enter the sales channel whose API credential settings will be used for API activities. If this value is left blank, the channel's assigned credentials will be used for its own API calls. For more information on credentialing, see here.	
Amazon Seller ID	This is your Amazon merchant token. If the sales channel was created through the setup wizard, this value will be copied from the entry that was recorded during setup.	
Amazon Marketplace ID	This is the marketplace ID for your Amazon storefront. If the sales channel was created through the setup wizard, this value will be copied from the entry that was recorded during setup. If you have multiple Amazon marketplaces and want to create a sales channel for each one, this value will be unique from channel to channel.	
Fulfillment Network	The value in this field identifies the Amazon fulfillment method by which channel orders are processed. You must assign one of the following values: • Amazon FBM: MFN • Amazon FBA: AFN. These values are specific to the Amazon fulfillment process; do not assign any other codes or values in this field. When CSM retrieves orders, it compares the fulfillment values supplied by Amazon to the sale channel's fulfillment value; if these values are not identical, the order retrieval process will error.	AFN or MFN

API Set Code	Identifies the API Set code that should be used for API communication with Amazon. This should be the value that you used to setup the Amazon API Set in the CSM API Sets section earlier in this document.	AMAZON_SPAPI
API User ID / API User Password	Certain API calls are made against specific sales channel records. CSM will use the user ID and password that are assigned to a specific store when calls are made against that store. It scenarios where the same user ID and password apply to multiple stores, the credentialing sales channel functionality can be used.	

CSM Shipping Methods

Most eCommerce platforms contain some sort of way to identify the manner by which products are shipped or delivered to customers. The terminology for these records varies from platform to platform, but within CSM these categorizations are referred to as "CSM shipping methods." CSM shipping carriers are set up to correspond to existing Business Central shipping agent codes.

CSM shipping methods correspond to "shipping method" records in Amazon. Amazon uses this record type to represent general delivery scenarios, such as free economy shipping and standard shipping. Each shipping method scenario is fulfilled according to a default carrier. For example, both Next Day and Second Day shipping are typically supported by Amazon as a carrier. Amazon supports a number of standard delivery methods, and it is not possible for Amazon users to manually set up new records.

It is recommended that you use CSM shipping methods to link your Business Central shipping agent codes and your Amazon delivery methods. When shipping information is sent between your Business Central and Amazon environments, this association will ensure that the proper order information is maintained in both platforms. You can automatically load new CSM shipping method records that are based on Amazon's default records:

1. Choose the icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the CSM sales channel record for which you want to import shipping methods.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Shipping Methods** action.
4. In the **CSM Shipping Methods** window, choose the **Actions** ribbon, then choose the **Retrieve Shipping Methods** action.

CSM creates new CSM shipping method records based on the default methods that are supported by Amazon. It will then assign a Business Central shipping agent code based on the default carrier that Amazon uses for the relevant shipping method. If CSM is able to identify a Business Central shipping agent code that is identical to default carrier, it will automatically link these records by assigning the value in the **Shipping Agent Code** field. If CSM cannot identify a shipping agent code that matches the expected default, a new shipping agent code will be created and assigned to the CSM shipping carrier line.

> ***Note:*** *the functionality to load CSM shipping methods does not extend beyond the default methods that are supported by Amazon.*

5. If you want to post a shipping method's shipping charges to a Business Central account, use the **Shipping Order Charge Type** and **Shipping Order Change No.** fields to identify the account to which charges will be recorded.

Note: *A change was introduced in release 2.2 of CSM for Amazon that changes the channel order field to which shipping methods are mapped. If you have upgraded your CSM for Amazon application to version 2.2 or higher, you must manually change this mapping in the relevant API functions. The API functions you must update are dependent on your API set:*

- *SP-API: From the GETORDERS function, locate the existing mapping to table 70338221, field 200 (Ship Service Level) and update this field number to 205 (Channel Shipping Method).*
- *MWS: From the LISTORDERS function, locate the existing mapping to table 70338221, field 200 (Ship Service Level) and update this field number to 205 (Channel Shipping Method). Repeat this process for the LISTORDERSBYTOKEN function.*

CSM Payment Methods

Since we set the Payment Method Behavior to Channel. No CSM Payment Methods are required for Amazon Sales Channels.

CSM Shipping Carriers

Most eCommerce platforms contain some sort of way to identify the carriers that deliver product shipments to customers. The terminology for these records varies from platform to platform, but within CSM these categorizations are referred to as "CSM shipping carriers." CSM shipping carriers are set up to correspond to existing Business Central shipping agent codes.

CSM shipping carriers correspond to "carrier" records in Amazon. Amazon uses this record type to represent the following common carriers:

- Amazon
- DHL
- FedEx
- UPS
- USPS

In addition to these common carriers, Amazon supports a number of other carriers that are popular in different areas of the world.

Supported carriers are determined by Amazon and not subject to expansion or change; it is not possible for Amazon users to manually set up new records.

It is recommended that you use CSM shipping carriers to link your Business Central shipping agent codes and your Amazon carriers. When shipping information is sent between your Business Central and Amazon environments, this association will ensure that the proper order information is maintained in both platforms. You can automatically load new CSM shipping carrier records that are based on Amazon's default records:

1. Choose the icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the CSM sales channel record for which you want to import shipping carriers.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Shipping Carriers** action.
4. In the **CSM Shipping Carriers** window, choose the **Actions** ribbon, then choose the **Retrieve Shipping Carriers** action.

CSM creates new CSM shipping carrier records based on the default carriers that are supported by Amazon. If CSM is able to identify a Business Central shipping agent code that is identical to a CSM shipping carrier record's external ID, it will automatically link these records by assigning the value in the **Shipping Agent Code** field. If CSM cannot identify a shipping agent code that matches a CSM shipping carrier's external ID, a new shipping agent code will be created and assigned to the CSM shipping carrier line.

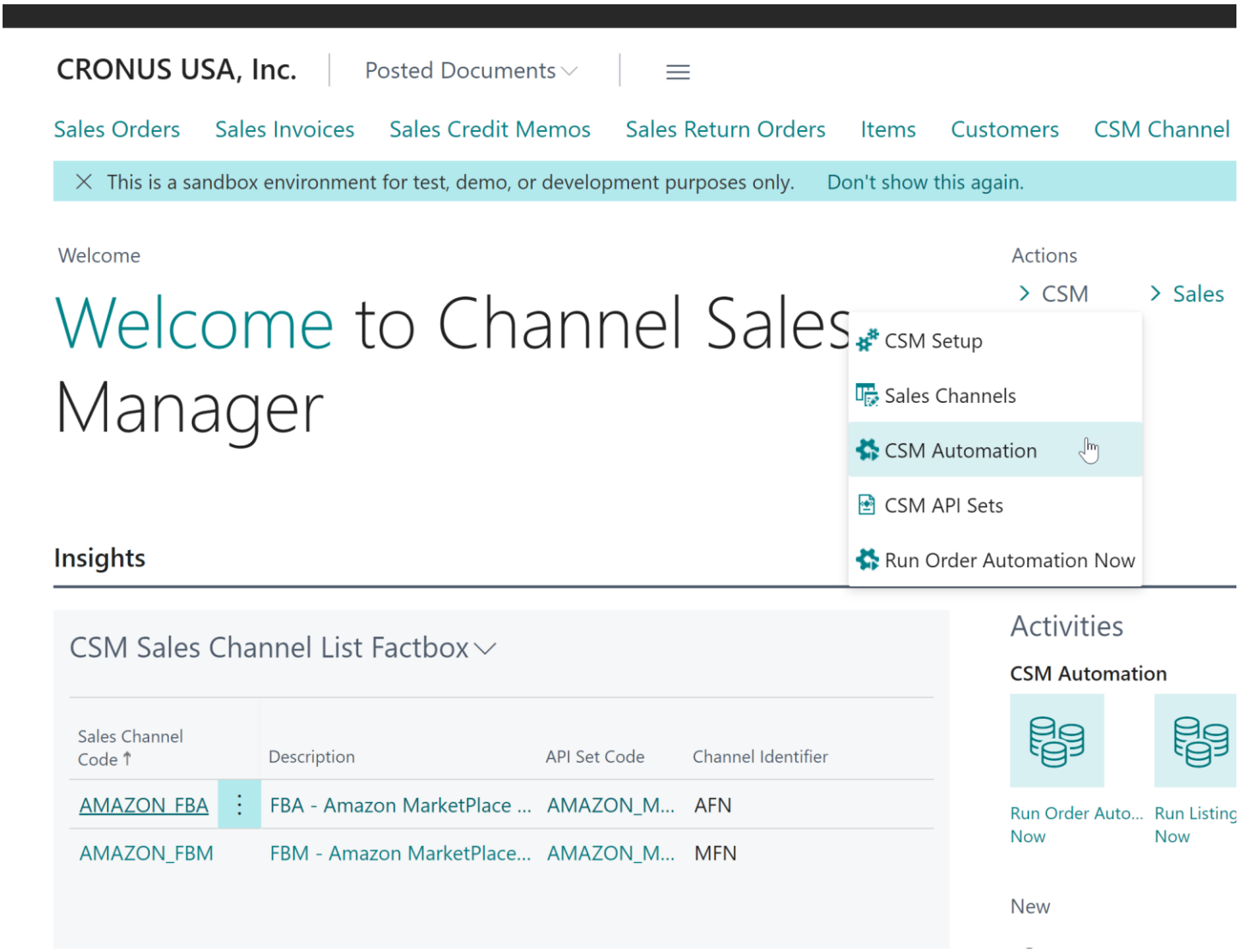
Note: *the functionality to load CSM shipping carriers does not extend beyond the default carriers that are supported by Amazon.*

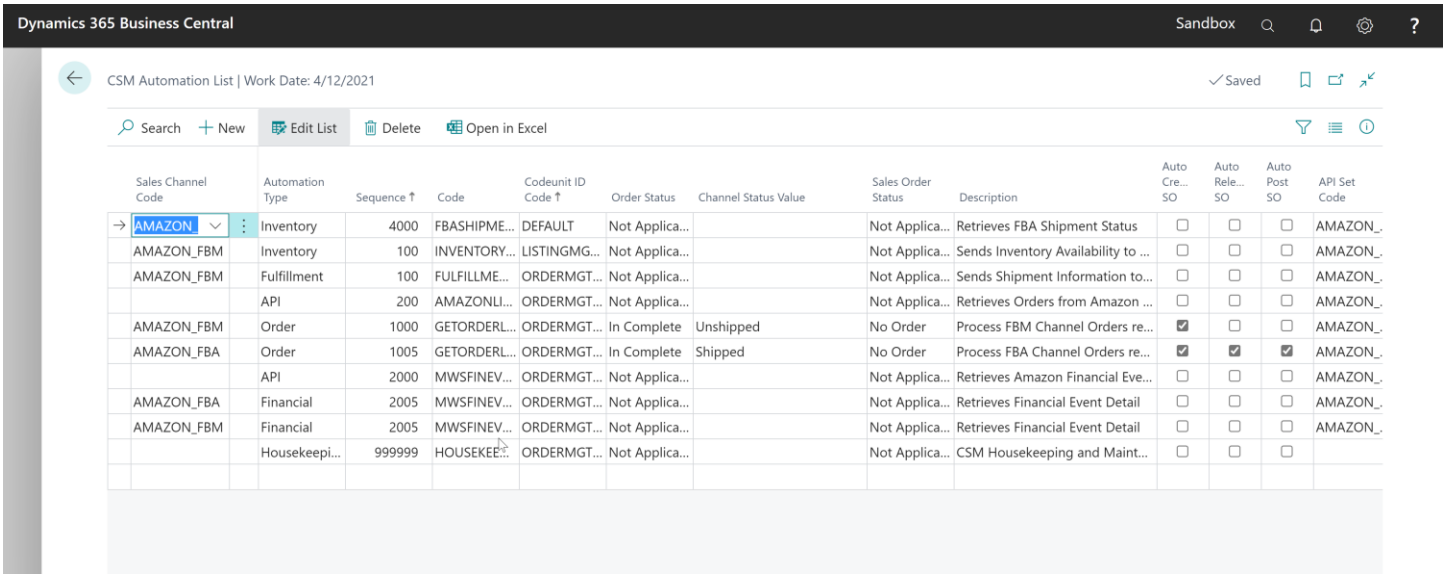
BC Order Status Matrix

The BC order status Matrix is data that CSM uses to determine a Channel BC order status based on information received from Amazon. This data is pre-loaded. Please change these status values carefully to ensure CSM integrity when assigning a status to a Channel Order.

CSM Automation List

The Automation List allows for tasks to be run in batch and on a schedule and can be found in the Role Center tasks.





Sales Channel Code	Automation Type	Sequence	Code	Codeunit ID Code	Order Status	Channel Status Value	Sales Order Status	Description	Auto Cre... SO	Auto Rele... SO	Auto Post SO	API Set Code
AMAZON	Inventory	4000	FBASHIPME...	DEFAULT	Not Applica...		Not Applica...	Retrieves FBA Shipment Status	☐	☐	☐	AMAZON_
AMAZON_FBM	Inventory	100	INVENTORY...	LISTINGMG...	Not Applica...		Not Applica...	Sends Inventory Availability to ...	☐	☐	☐	AMAZON_
AMAZON_FBM	Fulfillment	100	FULFILLME...	ORDERMGT...	Not Applica...		Not Applica...	Sends Shipment Information to...	☐	☐	☐	AMAZON_
	API	200	AMAZONLI...	ORDERMGT...	Not Applica...		Not Applica...	Retrieves Orders from Amazon ...	☐	☐	☐	AMAZON_
AMAZON_FBM	Order	1000	GETORDERL...	ORDERMGT...	In Complete	Unshipped	No Order	Process FBM Channel Orders re...	☑	☐	☐	AMAZON_
AMAZON_FBA	Order	1005	GETORDERL...	ORDERMGT...	In Complete	Shipped	No Order	Process FBA Channel Orders re...	☑	☑	☑	AMAZON_
	API	2000	MWSFINEV...	ORDERMGT...	Not Applica...		Not Applica...	Retrieves Amazon Financial Eve...	☐	☐	☐	AMAZON_
AMAZON_FBA	Financial	2005	MWSFINEV...	ORDERMGT...	Not Applica...		Not Applica...	Retrieves Financial Event Detail	☐	☐	☐	AMAZON_
AMAZON_FBM	Financial	2005	MWSFINEV...	ORDERMGT...	Not Applica...		Not Applica...	Retrieves Financial Event Detail	☐	☐	☐	AMAZON_
	Housekeepi...	999999	HOUSEKEE...	ORDERMGT...	Not Applica...		Not Applica...	CSM Housekeeping and Maint...	☐	☐	☐	

CSM includes two out-of-the box automation codeunits. The current versions of these codeunits support the creation of multiple job queues for CSM activities, but the older or "legacy" versions of these codeunits can still be used to execute automation routines. These codeunits are configured to execute against a particular codeunit ID code. When a codeunit is run, any CSM automation routines that share the relevant codeunit ID code will be executed. The out-of-the-box codeunits are configured to execute against default codeunit ID code values:

Automation Routine Type	Codeunit (Current)	Codeunit (Legacy)	Default Codeunit ID Code
Order Management	70338218	70338206	ORDERMGTDEFAULT
Listing Management	70338219	70338208	LISTINGMGTDEFAULT

Using the above table to illustrate, running codeunit 70338218 will by default execute any automation routines that have an assigned default codeunit ID code of *ORDERMGTDEFAULT*.

These default codeunit ID code values are assigned to all of the automation routines that are loaded as part of your *CSM for Amazon* solution, so this functionality will work for you out-of-the-box. It is possible to change these codes on some or all of the automation routines, then set up separate job queue entries for each code. In this way, you can configure the execution of automation routines to occur according to different schedules. This is typically not necessary, but there are some scenarios such as high-volume environments where scheduling different groups of automation routines to run separately can improve performance.

The order in which automation routine are executed is determined by their assigned sequence values. By default, the *CSM for Amazon* automation routines are sequenced according to Amazon's processes:

a. Initial general sequence codes – 100's range.
b. Order retrieval sequence codes – 1000's range.
c. Financial data communication sequence codes – 2000's range.

d. Inventory sequence codes – 4000's range (this line is described and used on FBA Inventory Management document).
e. Housekeeping – 9000's range.

First note the column for sequence, this determines the order of processing of the tasks.

Fulfillment Automation Tasks

The first automation task addresses the sending of shipping information to Amazon for FBM orders.

Send Shipment Information:

If in the Sales Channel, you turned **Send Shipment Information** switch to **on** and set the **Send Shipment When** to **Scheduled**, when this task is selected to run, all pending Shipment information will be sent to Amazon. If you selected Immediate, and an exception in the process prevented the communication from immediately completing (i.e. internet was down), the Automation Task will try again to send the information. If you selected Manual, this task will not send any Shipment information automatically.

Here is a field-by-field listing of the values necessary for the Automation to send Invoice Information.

Automation Task – Send Shipment Information to Amazon		
Field	Description	Example Value
Sales Channel	The Sales Channel for which Shipping Information should be sent.	AMAZON_FBM
Automation Type	Should always be Fulfillment.	Fulfillment
Sequence	The Sequence in the Automation run that Shipping Information should be sent. It is best to have Shipping information be the first task executed.	100
Code	The code the Automation uses to know what to do. For Amazon should always be set to FULFILLMENTFEED	FULFILLMENTFEED
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues.	ORDERMGTDEFAULT
BC order status	This value is Not Applicable for Send Shipment information to Amazon.	Not Applicable
Channel Status Value	This value is Not Applicable for Send Shipment information to Amazon.	Not Applicable
NAV BC order status	This value is Not Applicable for Send Shipment information to Amazon.	Not Applicable
Description	A description of the entry.	Sends Shipment Information to Amazon
Auto Create SO	This value is Not Applicable for Send Shipment information to Amazon.	Not Checked
Auto Release SO	This value is Not Applicable for Send Shipment information to Amazon.	Not Checked

Automation Task – Send Shipment Information to Amazon		
Auto Post SO	This value is Not Applicable for Send Shipment information to Amazon.	Not Checked
API Set Code	This value should be the API Set the Sales Channel uses	AMAZON_SPAPI
API Function Code	This value is Not Applicable for Send Shipment information to Amazon.	
Next Automation Code	This value is Not Applicable for Send Shipment information to Amazon.	
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run.	15 Minutes
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 12:00 AM

API Automation Tasks

The API Automation Tasks are those that run at the API Set level and are not tied to a specific Sales Channel that uses the API Set. For example, the Amazon API Functions to retrieve Channel Orders are setup to receive all orders associated with the API Set, not just orders for a specific sales channel (store / fulfillment method).

API Amazon List Orders:

This task will automatically retrieve any orders from Amazon that are new or have changed since the last time CSM retrieved orders. Initially, the date that **CSM uses to determine whether the orders are new or have changed is set by the Sales Channel Setup Actions function: Starting Order Retrieval Date.** Note that this API task **only retrieves summary** information regarding the order. Order lines and **other order information is performed by** the next automation task described: **Get Order Lines**

Here is a field-by-field listing of the values necessary for the Automation to retrieve the Amazon Order List.

Automation Task – Retrieve Amazon Orders		
Field	Description	Example Value
Sales Channel	This should be blank for Amazon, CSM uses the API Set to download all Amazon Orders for all sales channels tied to the API Set (Both FBA and FBM).	
Automation Type	Should always be API.	API
Sequence	The Sequence in the Automation run that Order List information is retrieved.	200
Code	This value is for your reference since the Automation Task uses the API Set Code and the API Set Function Code to determine what to do.	AMAZONLISTORDERS

Automation Task – Retrieve Amazon Orders		
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues.	ORDERMGTDEFAULT
BC order status	This value is Not Applicable for the API Sales Order List.	Not Applicable
Channel Status Value	This value is Not Applicable for the API Sales Order List.	
NAV BC order status	This value is Not Applicable for the API Sales Order List.	
Description	A description of the entry.	Retrieves Orders from Amazon
Auto Create SO	This value is Not Applicable for the API Sales Order List.	Not Checked
Auto Release SO	This value is Not Applicable for the API Sales Order List.	Not Checked
Auto Post SO	This value is Not Applicable for the API Sales Order List.	Not Checked
API Set Code	The Amazon API Set to use when executing the Task	AMAZON_SPAPI
API Function Code	The API Function Code to Use when executing the Task. This will almost always be LISTORDERS for Amazon API Sets.	LISTORDERS
Next Automation Code	This value is Not Applicable for the API Sales Order List.	
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run.	15 Minutes
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 12:00 AM

Order Automation Tasks

The Order Automation Tasks are those that download additional information regarding the summary orders retrieved by API processing. The Order Automation tasks can then specify additional processing to occur for each valid order. For example, the Order Automation task can create, release and even post a Sales Order.

Get Order Lines Order Automation Task:

This task will automatically retrieve additional order information, including the order lines, for any order that has reached the Channel Status Value specified in the Task. For example, Amazon will set the BC order status of an FBM order to Unshipped, when it is ready for you to ship. For an FBA order, Amazon will set the Channel Status to Shipped once they have shipped the order to the customer.

Here is a field-by-field listing of the values necessary for the Automation to retrieve and process the Get Order Lines Task.

Automation Task – Retrieve Amazon Order Lines		
Field	Description	Example Value
Sales Channel	The Sales Channel for which order line Information should be retrieved and processed.	AMAZON_FBM
Automation Type	Should always be Order.	Order
Sequence	The Sequence in the Automation run that Order Line information is retrieved.	1000
Code	This value is for your reference since the Automation Task uses the API Set Code and the API Set Function Code to determine what to do.	GETORDERLINES
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues.	ORDERMGTDEFAULT
BC order status	The CSM assigned status of the order which should have be reached before processing this task. For Amazon Get Order Lines, this is normally In Complete which designates an order whose summary information has been retrieved but has not yet retrieved the remainder of the order information.	In Complete
Channel Status Value	The Amazon Status of the Order that this Automation task should process. For FBM this is normally Unshipped, for FBA orders, this is normally Shipped.	Unshipped
NAV BC order status	The relationship status between the Channel Order and a Business Central Sales Order, normally this should be set to No Order.	No Order
Description	A description of the entry.	Get Order Lines when this status appears
Auto Create SO	If you wish CSM to automatically create a Business Central Sales Order for the Amazon Order being processed.	Checked
Auto Release SO	If you want CSM to automatically Release the Business Central Sales Order that was automatically created by CSM, check this box.	Checked
Auto Post SO	This would normally only be checked when the shipment of the order is automated. For example, Amazon FBA orders are fulfilled (shipped) by Amazon, so in this case, we want CSM to fully process the completed order (Create Order and Post the Shipment / Invoice). For user free processing of FBA orders, Set this field to On / Checked / True.	Not Checked
API Set Code	The Amazon API Set to use when executing the Task	AMAZON_SPAPI
API Function Code	The API Function Code to Use when executing the Task. This will almost always be LISTORDERITEMS for Amazon API Sets.	LISTORDERITEMS
Next Automation Code	This value is Not Applicable for the API Get Order Lines.	Not applicable

Automation Task – Retrieve Amazon Order Lines		
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run.	15 Minutes
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 12:00 AM

API Amazon List Financial Event Groups: (Available with the CSM for Amazon Financial Module)

This task will automatically **retrieve any Financial Event Groups from Amazon that are new or have changed since the last time CSM retrieved Financial Event Groups**. Initially, the date that CSM uses to determine whether the Financial Event Groups are new or have changed is set by the Sales Channel Setup Actions function: Starting Order Retrieval Date. Note that this API task only retrieves summary information regarding the Financial Event Group. Financial Event Transaction Details performed by the next automation task described: Amazon Financial Event Group Transactions.

Here is a field-by-field listing of the values necessary for the Automation to retrieve the Amazon Order List.

Automation Task – Retrieve Amazon Financial Event Groups		
Field	Description	Example Value
Sales Channel	This should be blank for Amazon, CSM uses the API Set to download all Amazon Financial Event Groups for all sales channels tied to the API Set (Both FBA and FBM).	
Automation Type	Should always be API.	API
Sequence	The Sequence in the Automation run that Financial Event Group List information is retrieved.	2000
Code	This value is for your reference since the Automation Task uses the API Set Code and the API Set Function Code to determine what to do.	MWSFINEVENTGROUP
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues.	ORDERMGTDEFAULT
BC order status	This value is Not Applicable for the API Financial Event Group List.	Not Applicable
Channel Status Value	This value is Not Applicable for the API Financial Event Group List.	Not Applicable
NAV BC order status	This value is Not Applicable for the API Financial Event Group List.	Not Applicable
Description	A description of the entry.	Retrieves Financial Event Groups from Amazon

Automation Task – Retrieve Amazon Financial Event Groups		
Auto Create SO	This value is Not Applicable for the API Financial Event Group List.	Not Checked
Auto Release SO	This value is Not Applicable for the API Financial Event Group List.	Not Checked
Auto Post SO	This value is Not Applicable for the API Financial Event Group List.	Not Checked
API Set Code	The API Set to use for the API Financial Event Group List.	AMAZON_SPAPI
API Function Code	The API Function Code to Use when executing the Task. This will almost always be LISTFINEVENTGROUP for Amazon API Sets.	LISTFINEVENTGROUP
Next Automation Code	This value is Not Applicable for the API Financial Event Group List.	
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run. The Financial Event Information is a heavier API, we recommend running it in off hours	12 Hours
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 6:00 AM

Get Financial Event Transactions Automation Task:

This task will **automatically retrieve the transactions relating to the Financial Event Groups retrieved**. This is a high overhead API and we recommend scheduling it to run in off hours.

Here is a field-by-field listing of the values necessary for the Automation to retrieve and process the Get Financial Event Transactions Task.

Automation Task – Retrieve Amazon Financial Event Transactions		
Field	Description	Example Value
Sales Channel	The Sales Channel for which to default any event transaction that is not associated with an order.	AMAZON_FBA
Automation Type	Should always be Financial.	Financial
Sequence	The Sequence in the Automation run that Order Line information is retrieved.	2005
Code	This value is for your reference since the Automation Task uses the API Set Code and the API Set Function Code to determine what to do.	MWSFINEVENTGROUPTRAN
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues.	ORDERMGTDEFAULT

Automation Task – Retrieve Amazon Financial Event Transactions		
BC order status	This value is Not Applicable for the API Financial Event Group Transaction.	
Channel Status Value	This value is Not Applicable for the API Financial Event Group Transaction.	
NAV BC order status	This value is Not Applicable for the API Financial Event Group Transaction.	
Description	A description of the entry.	Retrieves Financial Event Group Transactions from Amazon
Auto Create SO	This value is Not Applicable for the API Financial Event Group Transaction.	Not Checked
Auto Release SO	This value is Not Applicable for the API Financial Event Group Transaction.	Not Checked
Auto Post SO	This value is Not Applicable for the API Financial Event Group Transaction.	Not Checked
API Set Code	The API Set to use for the API Financial Event Group Transaction.	AMAZON_SPAPI
API Function Code	The API Function Code to Use when executing the Task. This will almost always be LISTFINEVENTGROUP for Amazon API Sets.	FINEVENTBYGROUPID
Next Automation Code	This value is Not Applicable for the API Financial Event Group Transaction.	
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run. The Financial Event Information is a heavier API, we recommend running it in off hours	12 Hours
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 6:00 AM

Get Inbound Shipments for Receipt

This task will **automatically retrieve the inbound shipment information for receipt**.

Here is a field-by-field listing of the values necessary.

Automation Task – Retrieve Amazon Financial Event Transactions		
Field	Description	Example Value
Sales Channel	The Sales Channel for which to default any event transaction that is not associated with an order.	AMAZON_FBA

Automation Task – Retrieve Amazon Financial Event Transactions		
Automation Type	Should always be Inventory.	Inventory
Sequence	The Sequence in the Automation run that Order Line information is retrieved.	4000
Code	This value is for your reference since the Automation Task uses the API Set Code and the API Set Function Code to determine what to do.	UPDATEFBAINBSHPSTAT
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues.	ORDERMGTDEFAULT
BC order status	This value is Not Applicable for the API Financial Event Group Transaction.	
Channel Status Value	This value is Not Applicable for the API Financial Event Group Transaction.	
NAV BC order status	This value is Not Applicable for the API Financial Event Group Transaction.	
Description	A description of the entry.	Retrieves FBA Shipment Status
Auto Create SO	This value is Not Applicable for the API Financial Event Group Transaction.	Not Checked
Auto Release SO	This value is Not Applicable for the API Financial Event Group Transaction.	Not Checked
Auto Post SO	This value is Not Applicable for the API Financial Event Group Transaction.	Not Checked
API Set Code	The API Set to use for the API Financial Event Group Transaction.	AMAZON_SPAPI
API Function Code	The API Function Code to Use when executing the Task.	
Next Automation Code	This value is Not Applicable for the API Financial Event Group Transaction.	
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run. The Financial Event Information is a heavier API, we recommend running it in off hours	1 minute
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	10/25/2021 6:35 P

Configuring Job Queue Entries

While the process of manually running CSM's automation routines is useful in testing or troubleshooting scenarios, it is not the intended way in which the application should be used. Once you have tested CSM and validated that the

automation routines work as desired, you can schedule them to occur on a recurring basis by using standard Business Central job queue functionality. CSM includes the following codeunits that can be assigned to job queue entries:

- 70338218, *CSM OrderAutomationJobQueue*
- 70338219, *CSM ListingAutomationJobQueue*

You can also use job queue parameter strings to set a filter based on automation records' codeunit ID codes. When the job queue entry runs, only those automation routines with the relevant codeunit ID code will be executed. The same codeunit ID code is assigned to all out-of-the-box automation routines, regardless of channel:

- Order management automation routines are assigned a codeunit ID code of *ORDERMGTDEFAULT*.
- Listing management automation routines are assigned a codeunit ID code of *LISTINGMGTDEFAULT*.

By default, the CSM job queue entry codeunits will execute against these codeunit IDs. For example, the order management codeunit will by default execute against all automation routines with a codeunit ID code of *ORDERMGTDEFAULT*. However, you can manually change an automation routine's codeunit ID code to a different value, then set up a separate job queue entry with a parameter string filter for this new value. When this job queue entry runs, it will execute only those automation routines that share this parameter.

A common scenario in which this is useful is in high-volume, multi-channel environments. If a single job queue entry is responsible for retrieving orders for all channels, the large volume of records being processed may lead to performance issues. In addition, if a problem with the order retrieval process exists for one channel, this failure will prevent the retrieval of orders for all other channels. In such a situation, you could assign different codeunit IDs to the automation routines for each channel, then set up separate job queue entries, each with a different codeunit ID assigned as the parameter. In this way, each job queue would execute the automation routines for a separate sales channel, reducing the overall volume of records being processed as part of each activity.

> ***Note:*** *the buttons on the CSM Administrator Role Center that allow for the execution of order management and listing management automation are hard-coded to the default ORDERMGTDEFAULT and LISTINGMGTDEFAULT codeunit IDs. If you create additional automation routines with difference codeunit IDs, they will not be included as part of these Role Center actions.*

To create a job queue entry for order management automation:

1. Choose the icon, enter **Job Queue Entries**, and then choose the related link.
2. Choose the **New** action in the ribbon to create a new job queue entry.
3. In the **Object Type to Run** field, select the *Codeunit* option.
4. In the **Object ID to Run** field, enter *70338218*.
5. If you have assigned different codeunit IDs to your automation routines, enter the one for which you are setting up the job queue entry in the **Parameter String** field.
6. To define the frequency with which the job queue entry will run and other setup values, please follow standard Business Central practices.
7. If you are working with multiple codeunit IDs, repeat steps 1-6 to set up additional job queue entries for each one.

To create job queue entries for listing management automation, follow the same process as described above, but assign codeunit *70338219* in the **Object ID to Run** field.

CSM Sales Operation Rules

CSM makes it possible for you to design a channel order handling process that enforces your business policies and workflows by allowing you to define sales operation rules.

When channel orders are retrieved from an external platform, CSM can be instructed to automatically create sales documents from these records. The application can also be configured to automatically release and post these Business Central documents. By using CSM's sales operation rules, you can establish criteria that will override a channel's standard automation routines. For example, you might want CSM to automatically release sales orders that are created for your Amazon channel, except when an order includes an item or items with insufficient inventory. In this scenario, you can implement a sales operation rule instructing CSM to deny the automatic release of sales orders whose item quantities exceed availability.

> ***Note:*** *CSM sales operation rules only apply to activities that are performed by CSM. Using the previous example of a rule that would deny the automatic release of sales orders whose item quantities exceed availability, this rule would not prohibit a user from manually releasing such a sales order.*

CSM includes out-of-the-box default rules that address two scenarios:

- **Unbalanced Totals:** a discrepancy exists between the order totals on a channel order and the related Business Central sales document.
- **Insufficient Inventory:** the quantity of an item on a retrieved order exceeds availability.

In addition, this feature is designed to allow for the easy implementation of custom rules that reflect your particular business processes.

To load the default rules that are included with CSM:

1. Choose the icon, enter **CSM Setup**, and then choose the related link.
2. Choose the **Related** ribbon, then choose the **CSM Sales Operation Rules** action.
3. In the **CSM Sales Operation Rules** window, choose the **Actions** ribbon, then choose the **Load Default Rules** action.

CSM loads the default sales operation rules that are included with the application. Each rule is assigned a unique rule code that addresses a different combination of scenario, processing action, and Business Central document type. All of CSM's default sales operation rules are configured to deny an order processing action for the assigned document type if the scenario's conditions are met (for example, deny the automatic release of a sales order if any item order quantities have insufficient availability, or deny the automatic posting of a sales order if a discrepancy exists between the order totals on a channel order and the related Business Central sales document).

If you wish to enforce a rule, you must enable it:

4. Choose the CSM sales operation rule you want to enable, then place a check mark in the **Enabled** field.

5. If you have multiple CSM sales channels set up in Business Central and want to enable the sales operation rule for a specific one, enter or use the lookup in the **Sales Channel Code** field to assign the desired channel. If the **Sales Channel Code** field is left blank, the rule will apply to all channels.

   Note: *if you want to enable a sales operation rule for more than one (but not all) channels, you must manually create additional CSM sales operation rule lines for each channel.*

The other settings on the CSM sales operation rules lines should not be modified, as they are pre-configured to perform specific activities.

CSM Sales Operation Rule Functions

Each scenario that is addressed by CSM sales operation rules is designed as a separate action processing function. These functions are contained within a codeunit that is identified as a unique "sales operation rule evaluator." CSM's out-of-the-box functionality includes a *CSM Sales Operation Rules Mgt.* rule evaluator that comprises the processing functions for its default scenarios.

Using this structure, it is possible for you to extend the capabilities of CSM sales operation rules to meet your specific business processes by creating custom codeunits with additional functions.

As an example, suppose we added a custom "Approval Code" field to the sales order table, and as part of our company's workflow, we want to enforce the assignment of an approval code on all sales orders. In this scenario, we could create a new function that instructs CSM to deny processing actions for orders with a blank approval code. This and other functions would be included as part of a new, custom sales operation rule evaluator, which could then be assigned to CSM sales operation rule lines.

The creation of new CSM sales operation rule functions and evaluators does require development activity; if you want to add new sales operation rules to your CSM solution, please consult your CSM partner for assistance.

CSM Everyday Operations

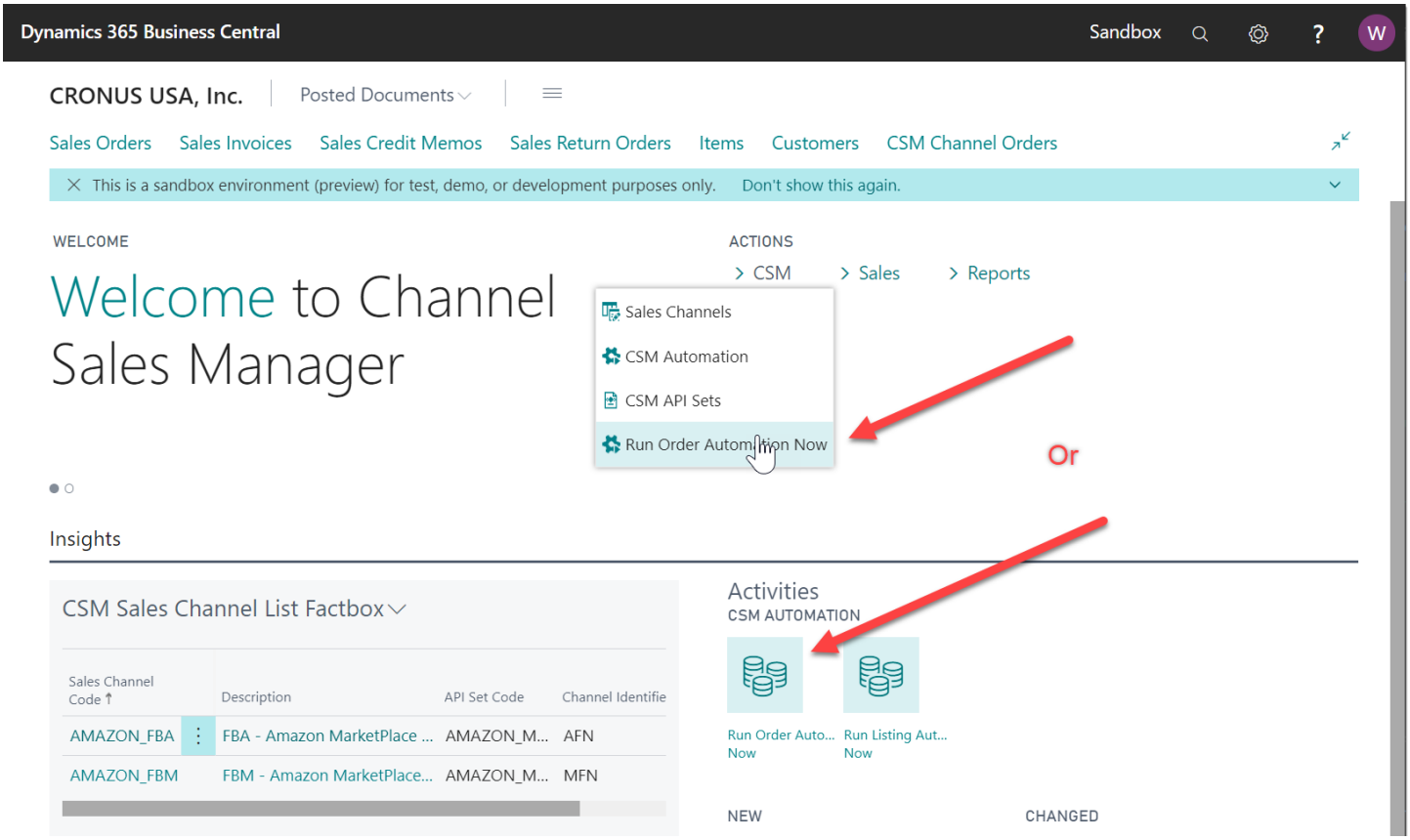
This section will cover CSM operations that you will routinely perform.

Running the Automation Manually

Typically, your automation routines will run automatically according to scheduled job queue entries. However, if you need to run the automation manually (such as for testing or troubleshooting), you can do so from the CSM Administrator Role Center.

Return to the CSM Role Center and press Actions > Tasks > Run Order Automation Now (Alternatively, you could press the Run Order Automation Now button in the Activities area of the role center). The automation is normally a scheduled

job, but by pressing this button, we are forcing it to run immediately.

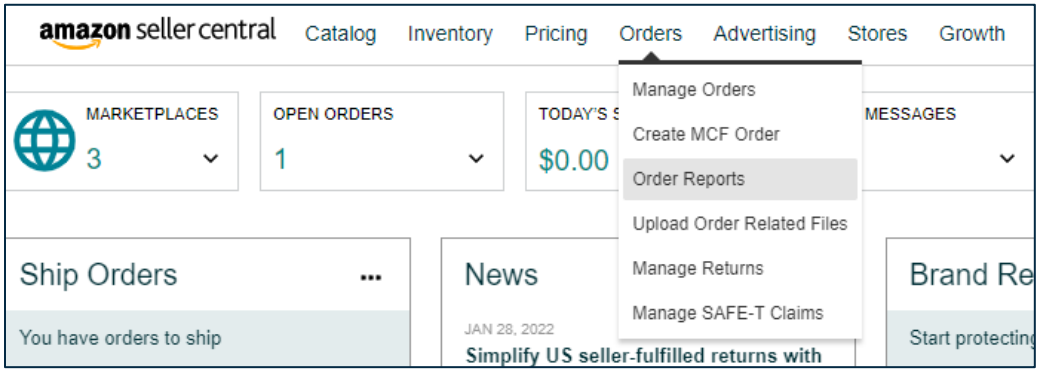


This should start a process of downloading orders that were new or have changed since the starting order retrieval date you entered in setting up CSM for Amazon. This first run may execute for a minute or so, since it is also downloading all Amazon Fee detail since that time as well. Normally the automation would just process the current Amazon 14-day fee cycle.

Importing FBM Order Reports

In order to present the correct address information on FBM channel orders, it is necessary to download an order report containing this information from your Amazon Seller Central account, then import this report into Business Central:

1. Log into your Amazon Seller Central account.
2. Choose the **Orders** menu item located along the top of your dashboard, then choose the **Order Reports** option:



3. On the **Order Reports** page, choose the **Unshipped Orders** tab.
4. In the **Request Report** area, choose the **Request** button. This will create a new report line in the **Download Report** area. It may take up to 45 minutes for Amazon to generate the new report.
5. Choose the **Refresh** button in the **Download Report** area to refresh the report line.
6. When the report has been generated, a new **Download** button will be added in the **Download** column. Choose this button to download the report to your machine.

Now that you have an order report, you must import it into Business Central:

7. Choose the icon, enter **CSM Sales Channels**, and then choose the related link.
8. Open your Amazon FBM sales channel.
9. Choose the **Actions** ribbon, then choose the **Import Order Report** action.
10. In the **Import Buyer Address** window, enable the **Release Orders** field if you want to instruct CSM to release each CSM order's related sales order as part of the import process.
11. In the **File** field, use the AssistButton to open a file directory.
12. Navigate to the location of the order you downloaded in step 6, select it, and then choose the **Open** button.
13. In the **Import Buyer Address** window, choose the **OK** button.

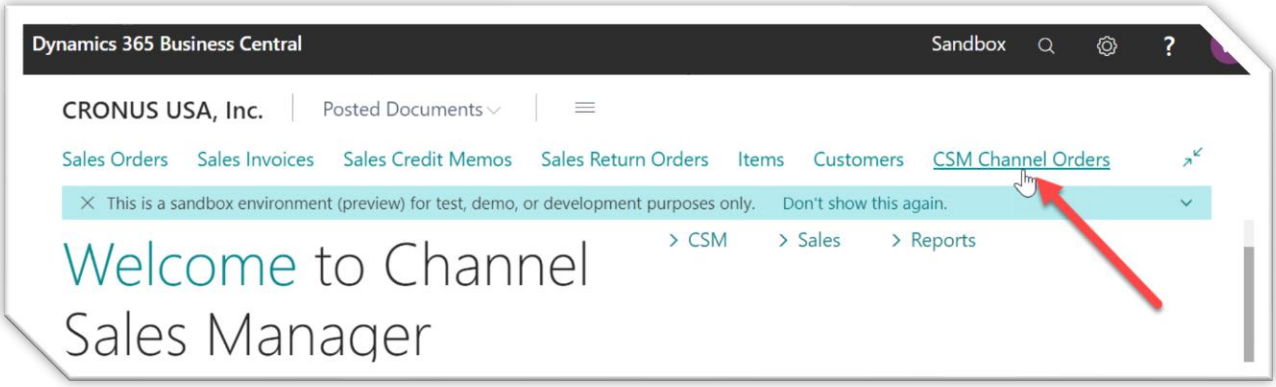
CSM imports the selected file and updates the address information on the relevant CSM orders accordingly. In turn, the related Business Central sales orders are also updated.

> ***Note:*** *the order report file you import must include order IDs for each Amazon order; if the order ID is not present in this file, the import process will fail. While the order ID is the only mandatory value, other values such as the buyer name and address are recommended; if these values are not present in the order report file, CSM will alert you to these missing values and give you an option as to whether you wish to continue with the import process.*

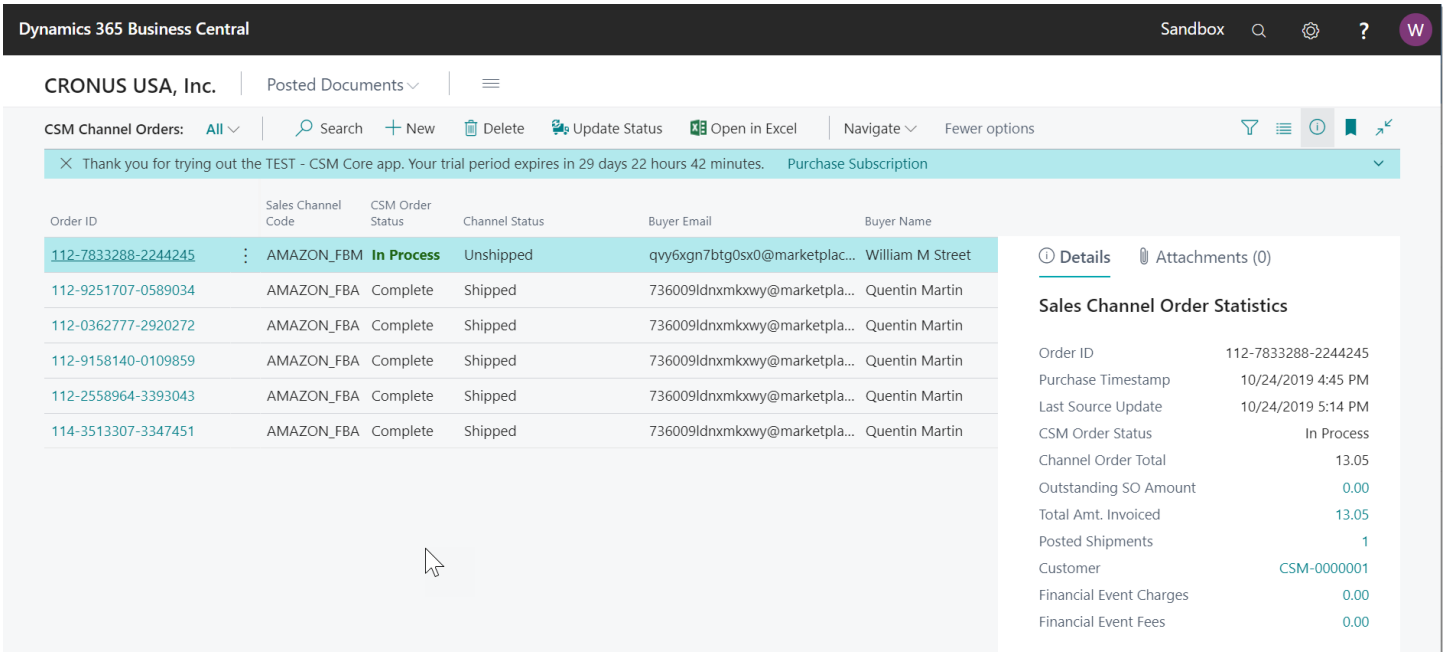
For more information on how to configure and download order reports in the Amazon Seller Central interface, see here.

Viewing Channel Orders

After the Automation runs, you can view the retrieved order information by navigating to CSM Channel Orders.



This will list all Channel Orders with a color-coded status. A CSM Channel Order is the data received from Amazon regarding an order, with some additional information as to the CSM status and links to other Business Central Information.



In the list above, we see an Amazon FBM order that is **In Process meaning that it is active and have a Business Central Sales Order linked**. We also see several FBA orders that are **Complete, meaning that they have been fully processed**, and **have Business Central Archived Sales Orders linked to them as well as Posted Shipments and Invoices**. In this case, CSM automatically Created the Business Central Sales Order and Automatically Posted the Shipment and Invoice.

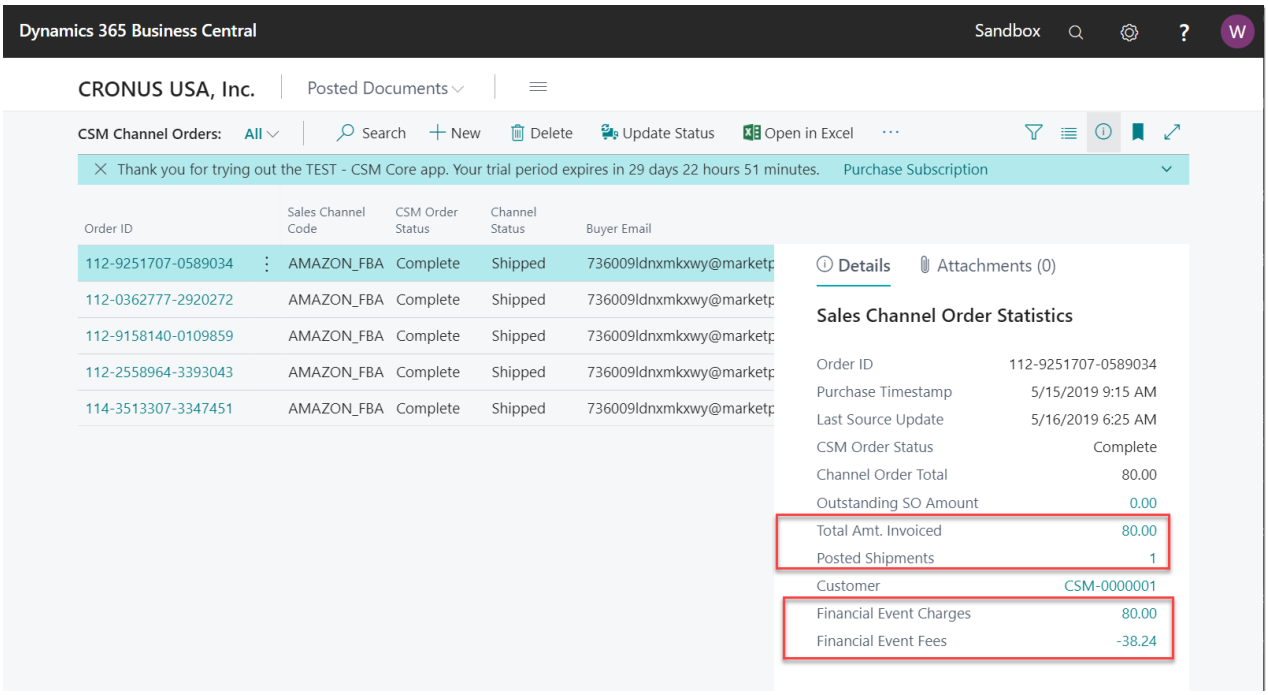
*If initially you bring in FBM orders with a status of shipped, CSM will show an error status since CSM does not create the Sales Order and does not have Linkage to the Posted Shipment

The Following presents a walkthrough of FBA order Processing followed by a walkthrough of FBM order processing including sending the Shipment Information back to Amazon.

Updating Channel Orders

To update the CSM BC order status against all open channel orders (all channel status except for “Complete”) you must filter all orders you want to update within the CSM Channel Order card. Once, you have selected all orders you want to update, then click the Update All Order function in the navigation ribbon. This function allows you to update the CSM BC order status for orders in bulk. This function will set all CSM BC order status to “New”. This function works for all Channel Status options except for “Complete”.

FBA Orders



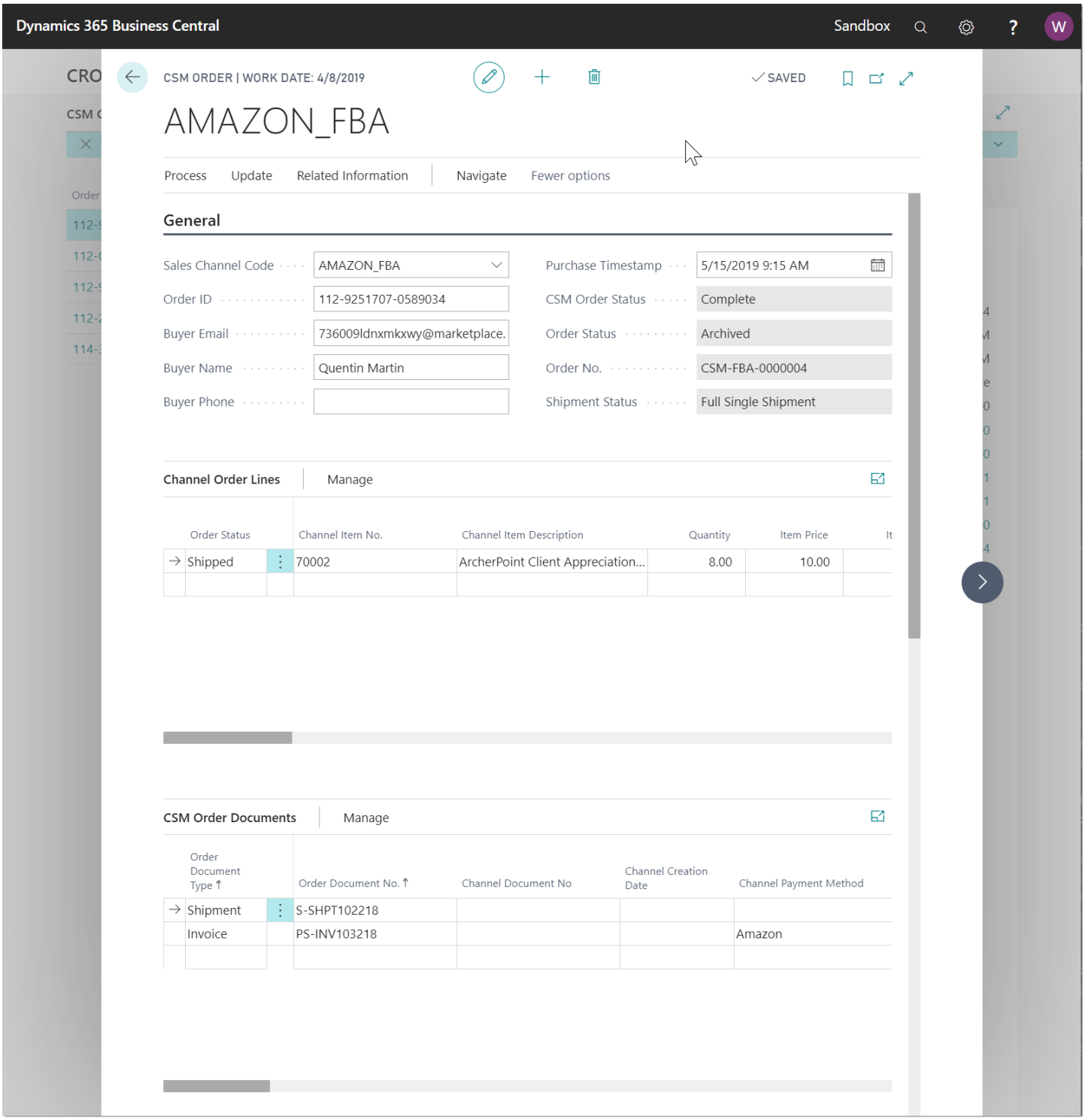
Note that in our above example, the automation retrieved 5 Amazon **FBA** Orders, created BC Sales Orders for all of them, and then automatically posted the Shipment and Invoice. Since these are Amazon FBA orders, they were shipped by Amazon (which we can tell from the BC order status), so we are just recording the sale, and posting the shipment to reflect that we now have less inventory in the Amazon Inventory Location.

Highlight one of the rows that shows a **Complete** status. Note in the FactBox for this line, has a posted shipment and posted invoice which was automatically posted based on the automation rules that were setup.

Also notice that we downloaded the Amazon Fees Associated with this order. You can use the hyperlinks to Navigate to the associated document or fee detail directly from the FactBox.

Channel Order Card

Selecting the Order ID hyperlink will show additional details regarding the CSM Channel Order.



Note that name and phone number fields will be blank **due to Amazon privacy policies.**

General FastTab

In the General FastTab of the Channel Order Card **CSM BC order status** is a summary status value based on the integrity of the data, and relationship of the Channel Order to other Business Central Sales Documents (Sales Order, Posted Invoices, Posted Shipments).

- **BC order status** is a status indicating what CSM found in Business Central that are related order documents.
- **No Order –** No Business Central Sales Documents were found for this Channel Order.
- **Open** – A Business Central Sales Order Exists with a status of Open.
- **Released** – A Business Central Sales Order Exists with a status of Released.
- **Partial** – A Business Central Sales Order Exists and some of the items on the order have shipped.
- **Pending Approval** – A Business Central Sales Order Exists with a status of Pending Approval.
- **Pending Prepayment** – A Business Central Sales Order Exists with a status of Pending Prepayment.
- **Shipped** – Posted Shipments exist that have completed the order.
- **Order No.** If the BC order status is any value other than **No Order**, then this will be the Business Central Order Document Number of the documents that relate to this Channel Order.
- **Shipment Status** is a summary status value of what has been shipped so far from this order:
- **Nothing Shipped –** no posted shipments could be found for this Channel Order.
- **Partial Shipped –** Posted Shipments were found, but some of the items have not fully shipped.
- **Full Single Shipment –** All Items shipped on a Single Posted Shipment.
- **Full Multiple Shipments –** The order is fully shipped and at least 2 Posted Shipments were found.

Order Lines FastTab

The Channel Order Lines FastTab presents information about the items that are assigned to the order, with a separate line being created for each item.

These are the order lines information as received from Amazon. Note that the **Channel Item No. and Channel Item Description are how Amazon knows the items as.** So How does CSM create a Sales Order with a Channel Item No. that could potentially be different than how an Item is defined in CSM?

- If a CSM Channel Listing is found for this Sales Channel, with a matching SKU, the Business Central Line information will be built with the Line Information on the listing. Note, having a CSM listing record is the only mechanism where Business Central Sales Lines can be non-Item types (G/L Account, Item Charge).
- Next, if the Channel Item No. matches exactly to a Business Central Item No., it will be used, and the Base Unit of Measure of the item will be assumed.
- After that, if the Channel Item No. is found in the Item Identifier table, then the Item, Variant, and Unit of Measure defined in the Item Identifier record will be used.
- Finally, the Item Cross Reference will be used (Bar Code Type).

If CSM fails to cross reference the Channel Item No. using any of the above methods, the Sales Order Creation process will fail, and the error message will indicate such.

Shipping FastTab

The Shipping FastTab presents channel order shipping information that was retrieved from Amazon.

The Amazon channel order's retrieved shipping method is entered in the **Channel Shipping Method** field. CSM uses the Amazon channel's defined shipping method mapping to assign a corresponding shipping agent and shipping agent service code to the related sales order. If a mapping does not exist for the retrieved shipping method, CSM will not be able to generate a sales order.

The Ship To Address information in this FastTab will be used to populate the Business Central Sales Order Ship To information.

Amazon Channel Data FastTab

The Amazon Channel Data FastTab contains additional information received from Amazon, including:

- **Amazon BC order status:** the status of the order as received from Amazon.
- **Amazon Seller Order ID:** the order ID that Amazon assigns to the order.
- **Amazon Fulfillment Network:** the network through the order was / is to be fulfilled.
- **Amazon Marketplace:** the marketplace ID of Amazon storefront through which the order was placed.

Refund Information FastTab

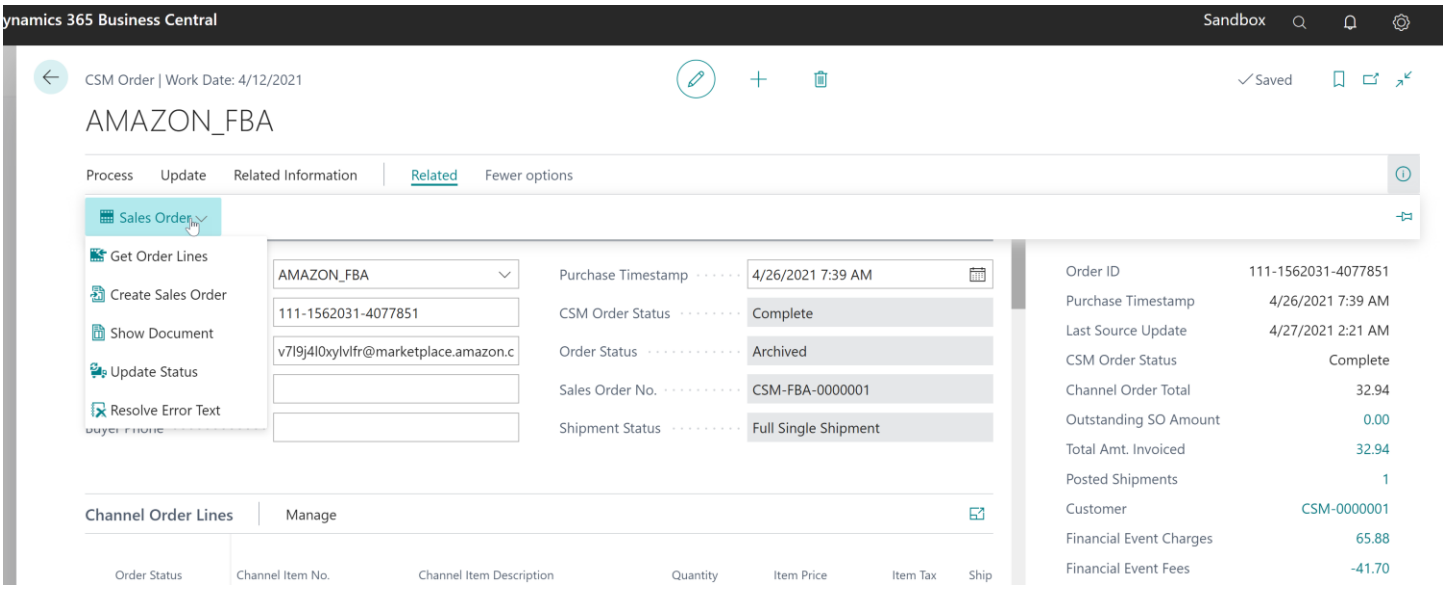
If Refund information is detected in the Financial Event Transactions for this order, that information will reside here.

Information FastTab

This FastTab on the channel order mostly contains housekeeping information regarding the Channel Order such as user information and relevant transaction and communication dates. Of interest in this section is the Status Text Field. If a Channel Order has a status of Error, the reason as to why it is in Error should be described in this field.

Channel Order Actions

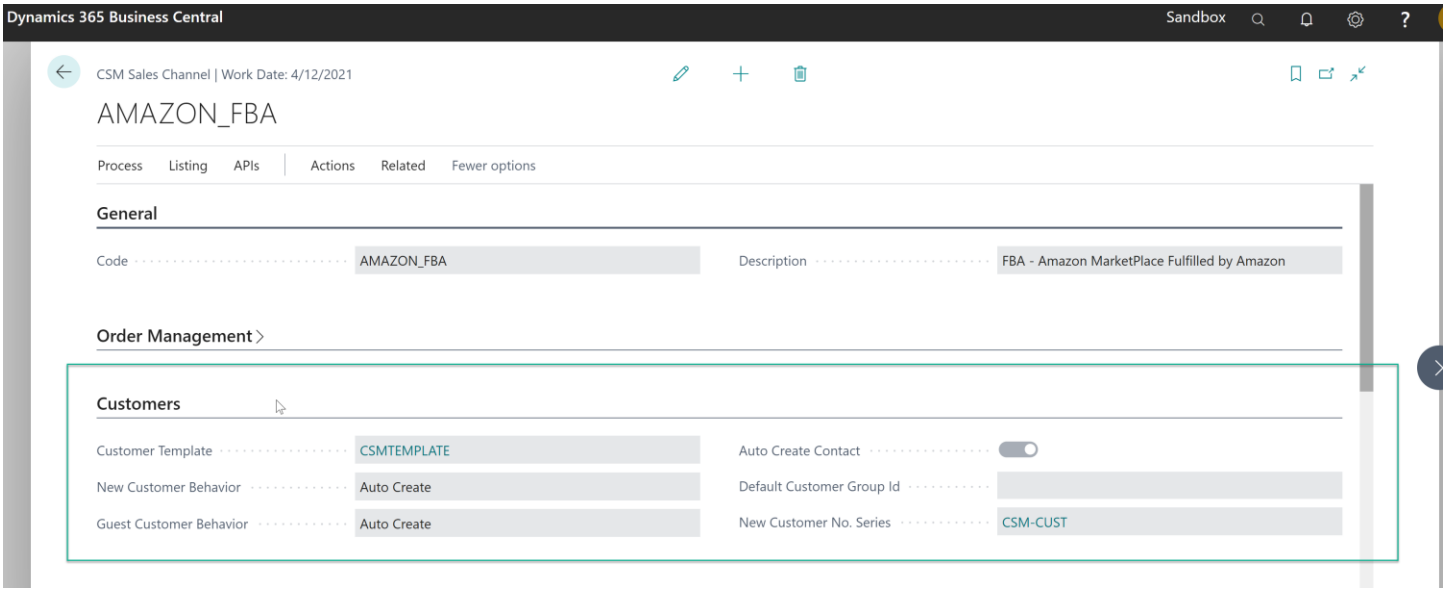
There are also several Actions that can be taken for a Channel Order. These are handy if the Channel Order is in error and you need to manually process the order.



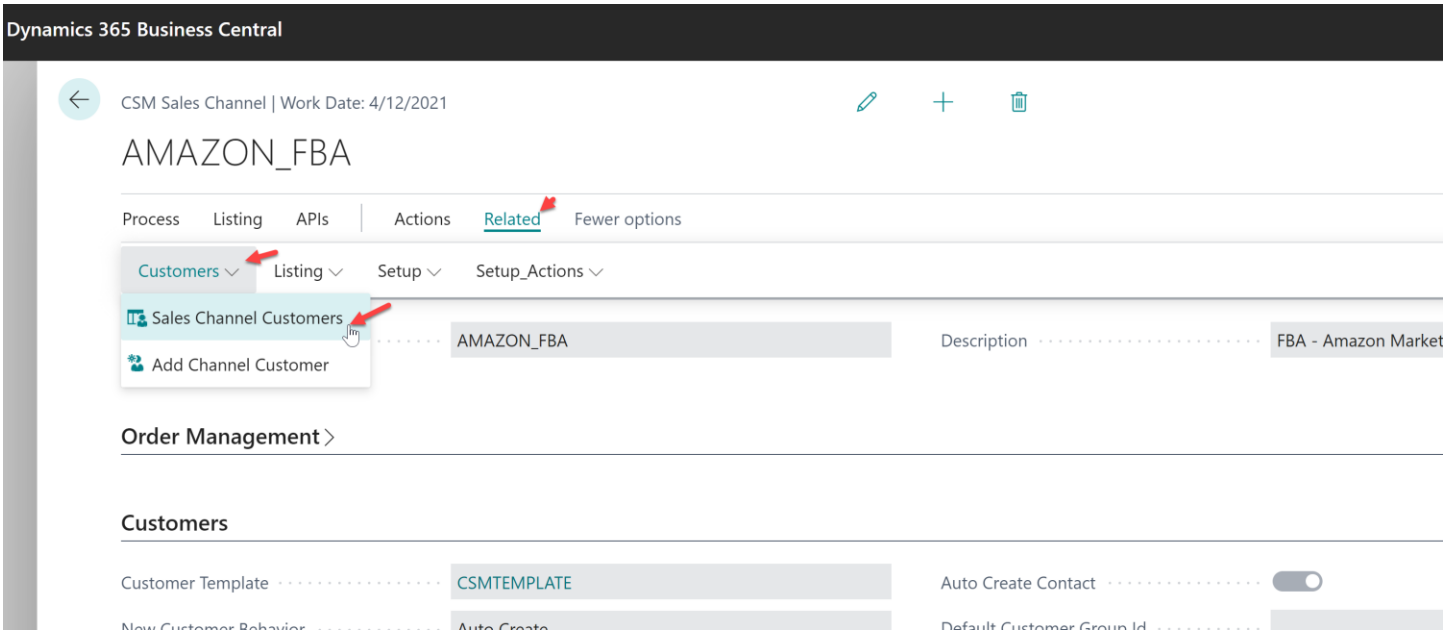
- Get Order Lines – This Action will communicate with Amazon to update the order and its lines.
- Create Sales Order – This action will attempt to use the data retrieved from Amazon to create a Business Central Sales Order. Note that **if CSM cannot perform this because of an error, the traditional Business Central Error Message Dialog will not appear. CSM, in this case, will change the status of the Channel Order to Error and present the Error reason in the CSM BC order status Text**.
- Show Document – CSM will Navigate to Business Central Sales Documents. If a Sales Order still exists in the system, that Sales Order Document will be navigated to. If a sales order is not found, then CSM will display the related Posted Sales Invoice(s).
- Update Status – CSM will reevaluate the Status of the Order.

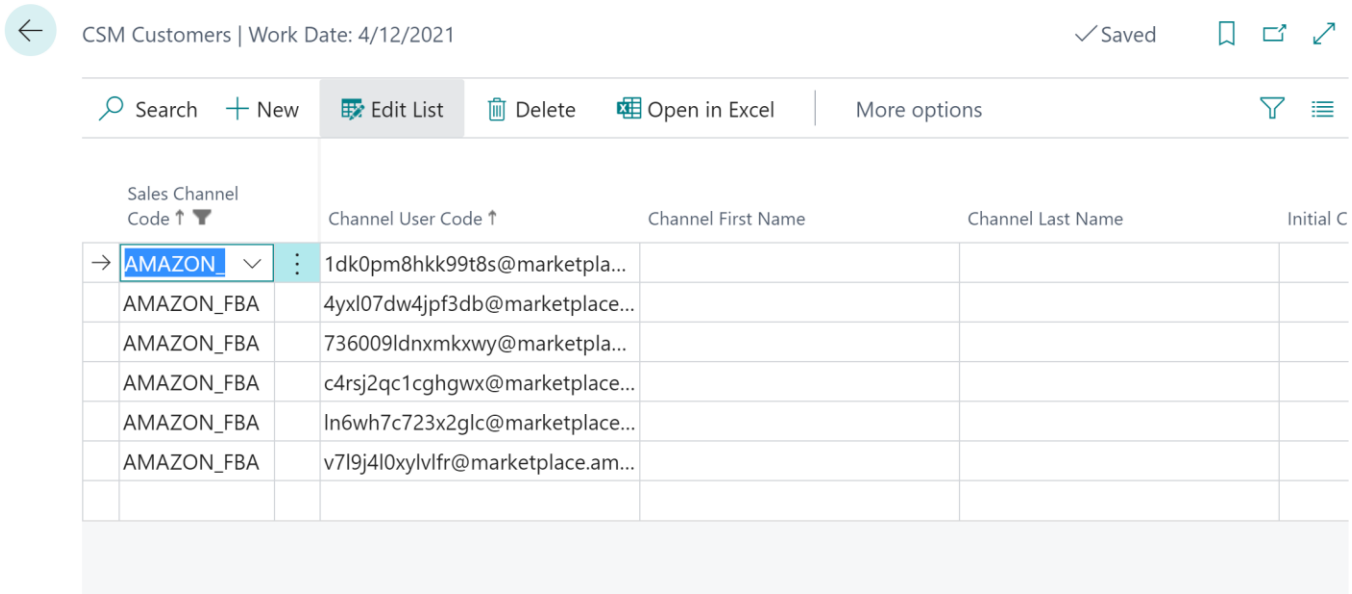
Sales Channel Customers

While processing Channel Orders into Business Central Sales Orders, CSM will follow the New and Guest Customer Behaviors specified on the Sales Channel Card.



Setting the behavior to Auto Create will cause CSM to determine whether a customer already exists in Business Central, or whether one needs to be created. To do this, CSM looks at the Sales Channel Customers table to find a match.





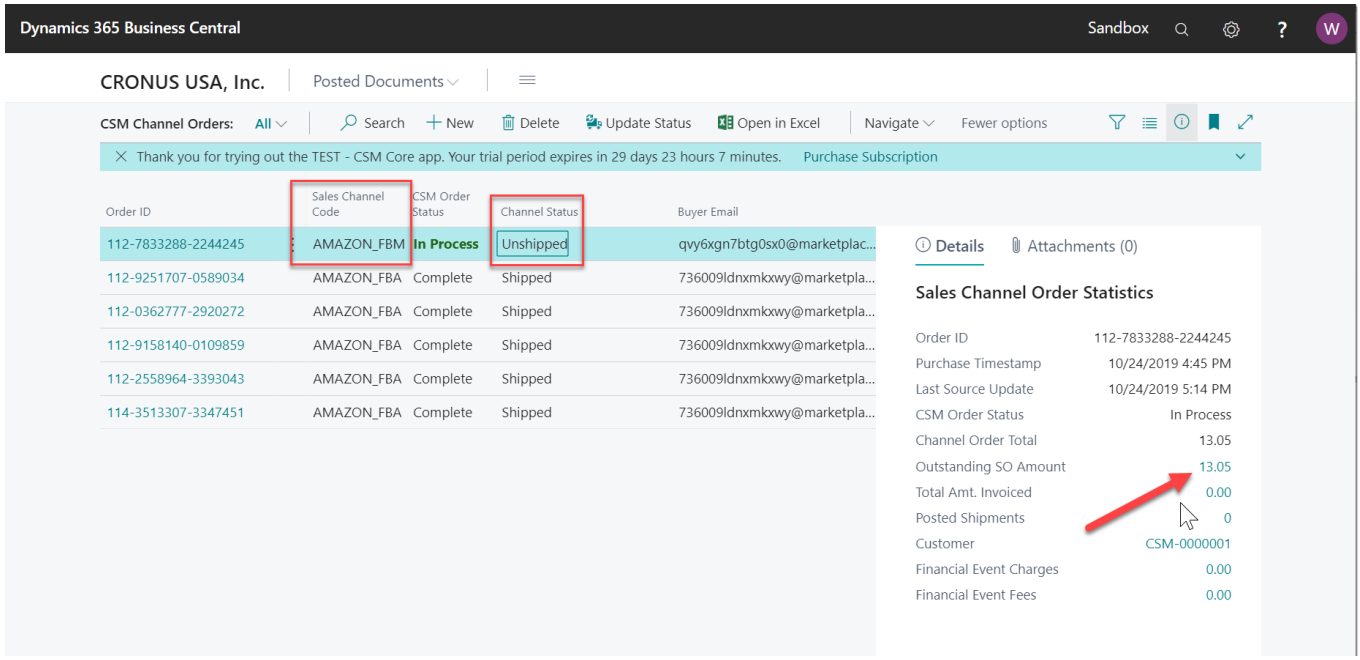
For Amazon Orders, CSM looks at the Amazon Assigned Email to see if there is a match

If the Sales Channel Customer Behavior is set to Sales Channel then Business Central Sales Orders will always be built using the Customer specified in the Sales Channel Customer Template and will override the Sales Orders shipping and billing addresses to those found on the Channel Order.

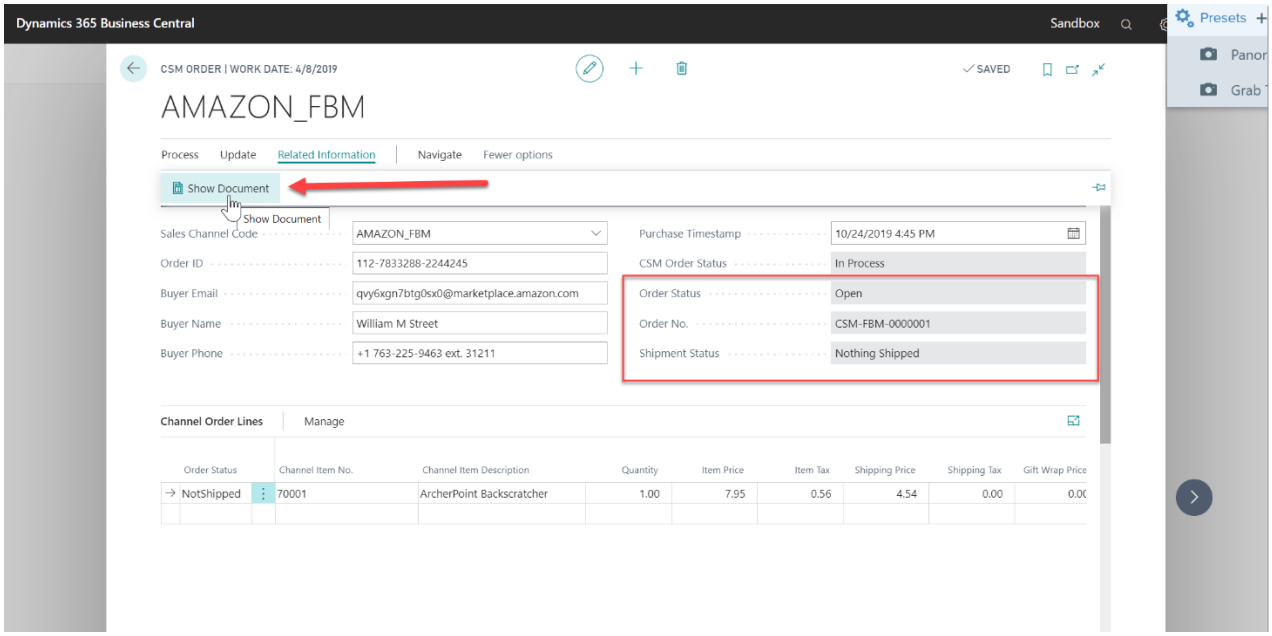
If the Sales Channel Customer Behavior is set to Manual, and no match is found in the Sales Channel Customers table, then the Sales Order Creation process will fail.

FBM Orders

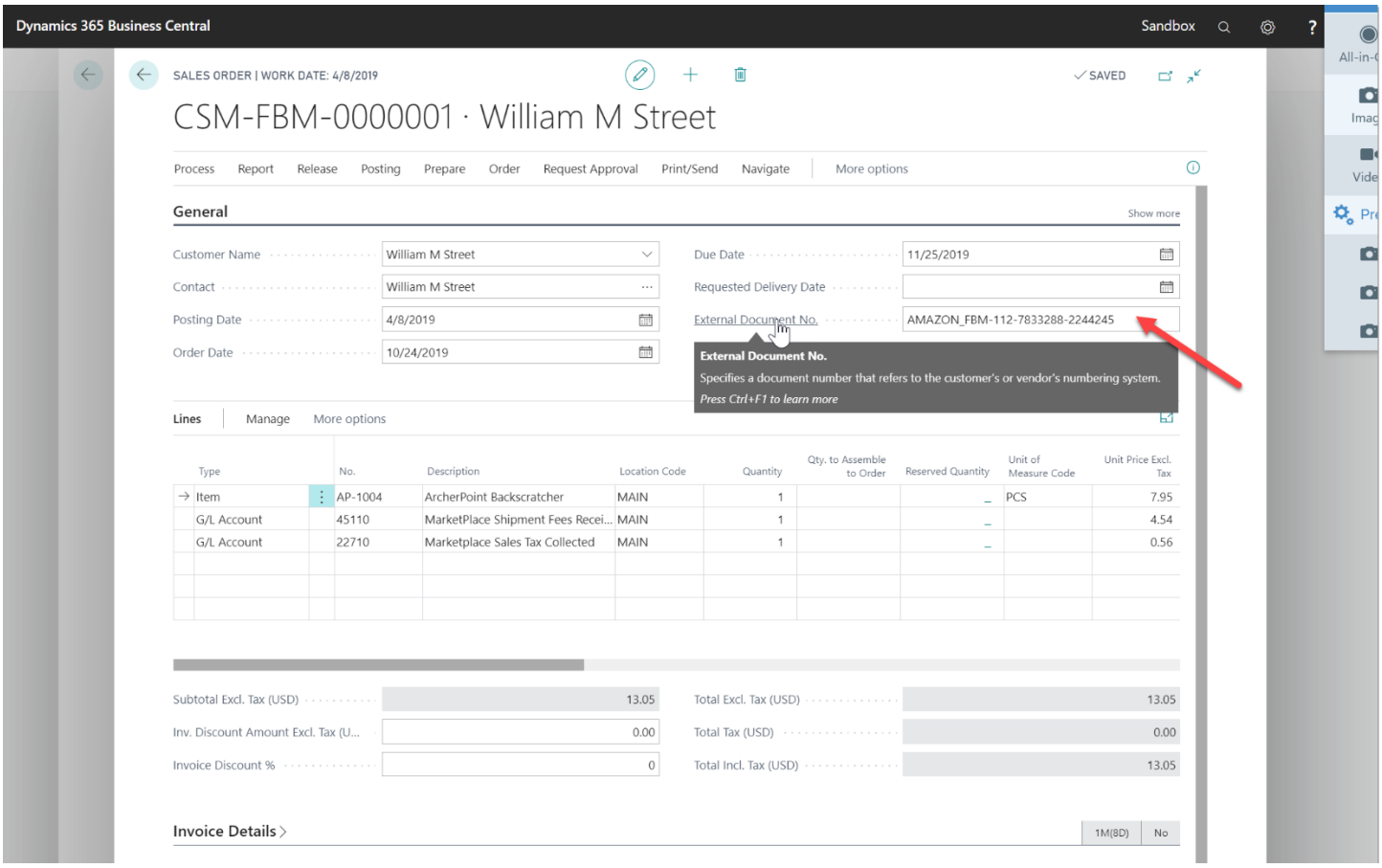
The Automation retrieves new orders which includes a new FBM order with a Channel (Amazon) status of **"Unshipped".** The Automation, based on setup, creates a new Business Central Sales Order.



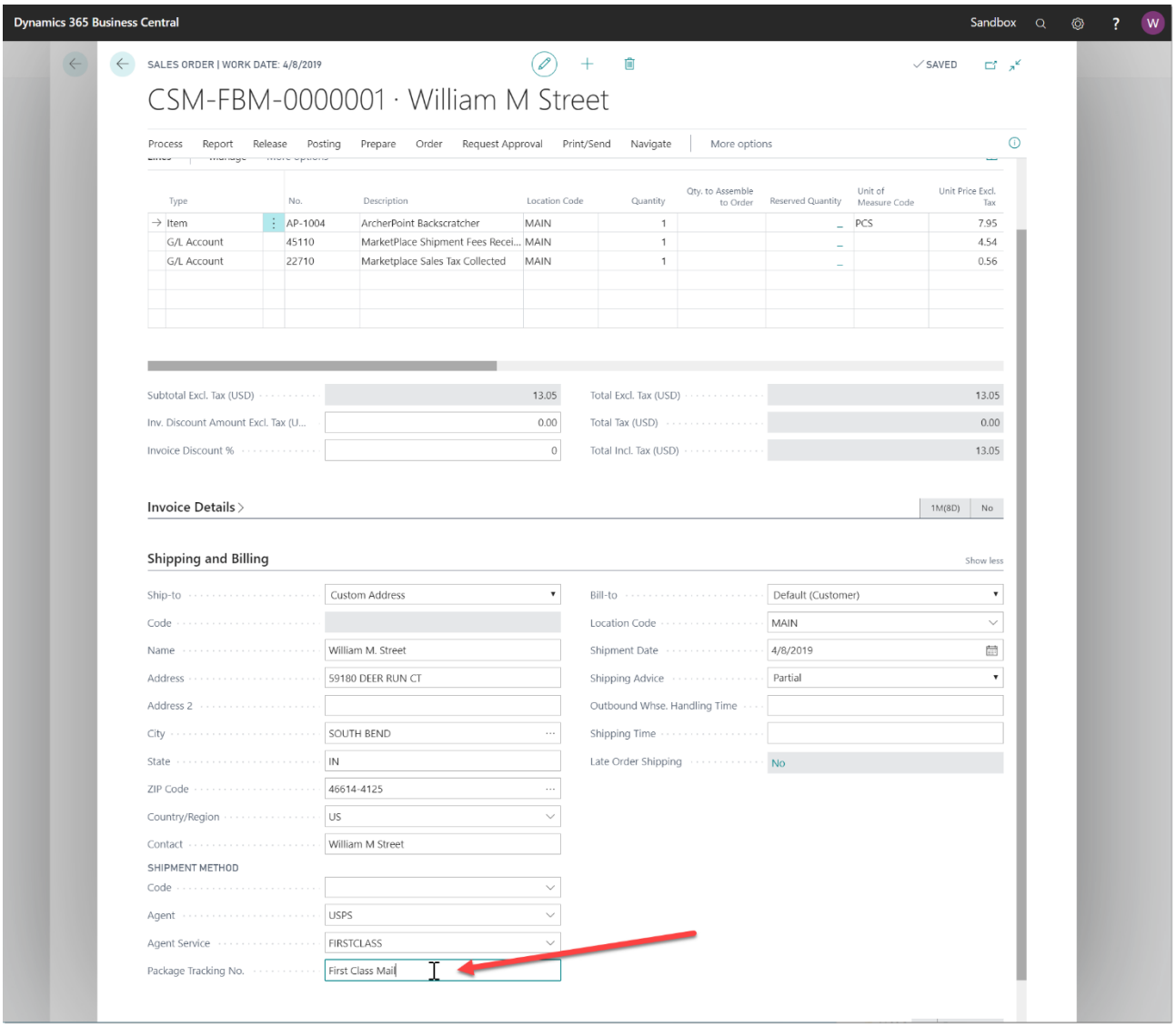
The Channel Order Card now shows the details of the FBM Order received from Amazon and the link to the Business Central Sales Order.



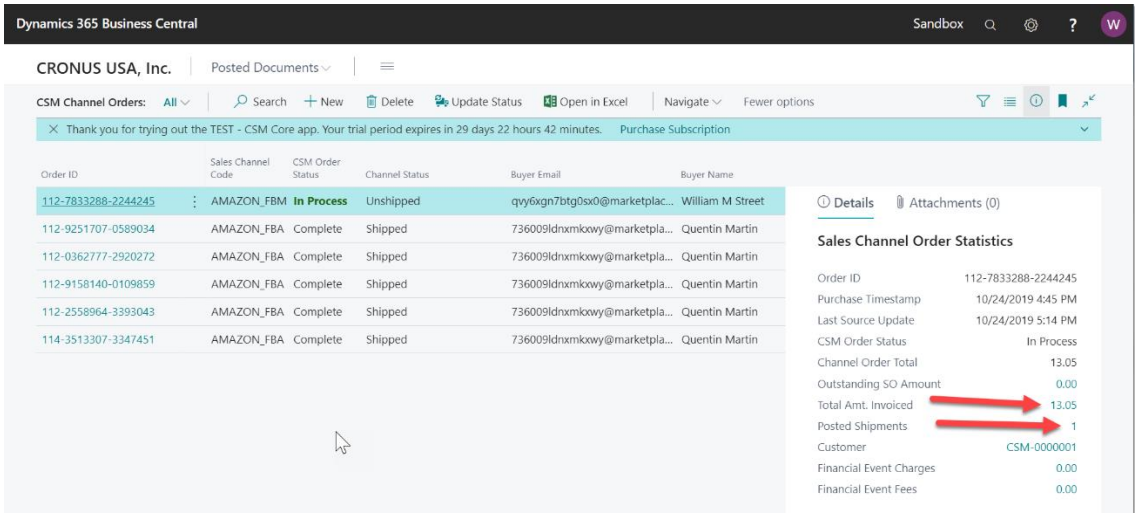
By pressing the Show Document button on the Channel Order Card, CSM will open the related Business Central Sales Order. The External Document Number is how the Channel Order is linked to the Business Central Sales Order.



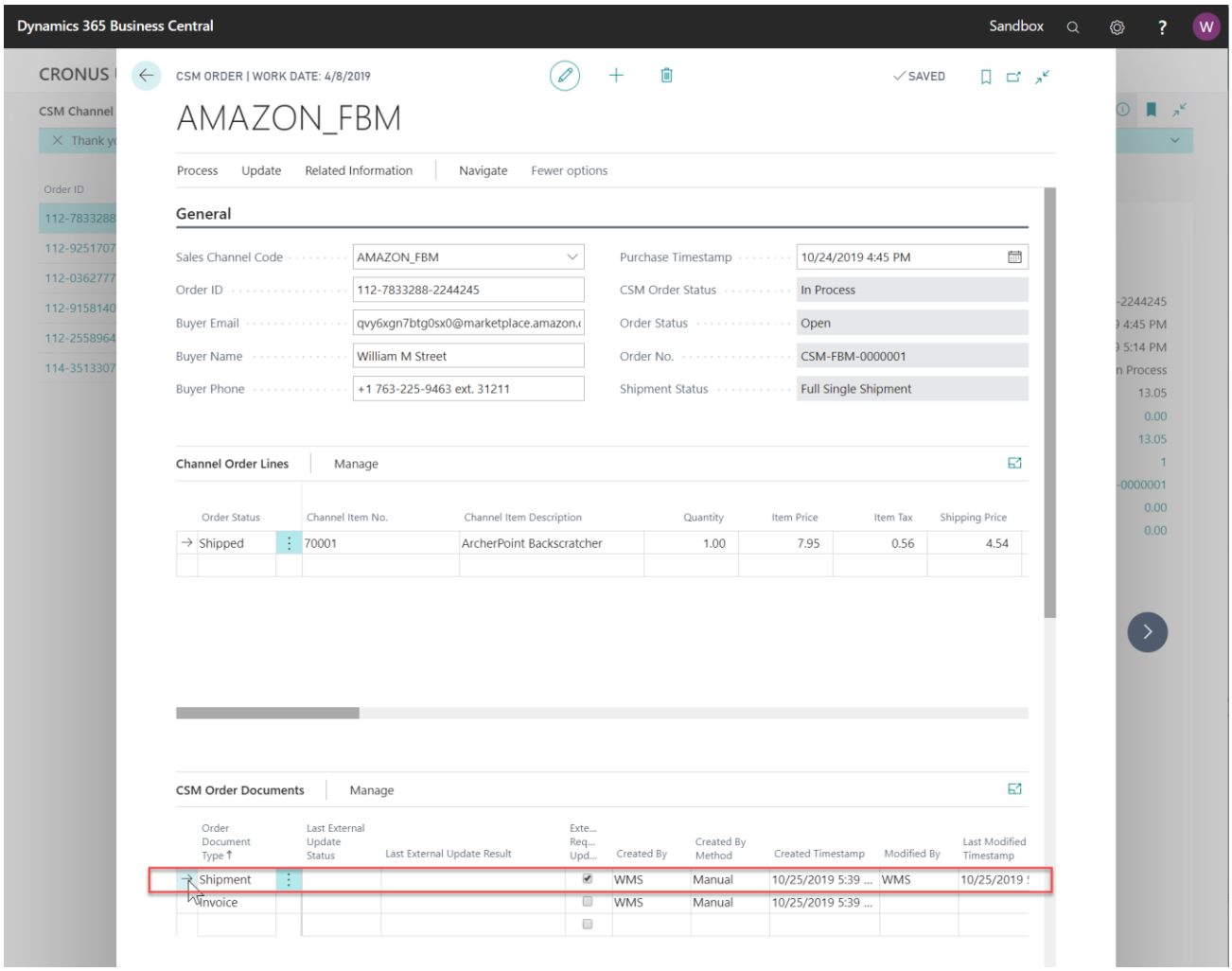
We can enter a **Shipment Tracking Number in the Business Central Sales Order Document Shipping and Billing FastTab** and then Post the Shipment and Invoice.



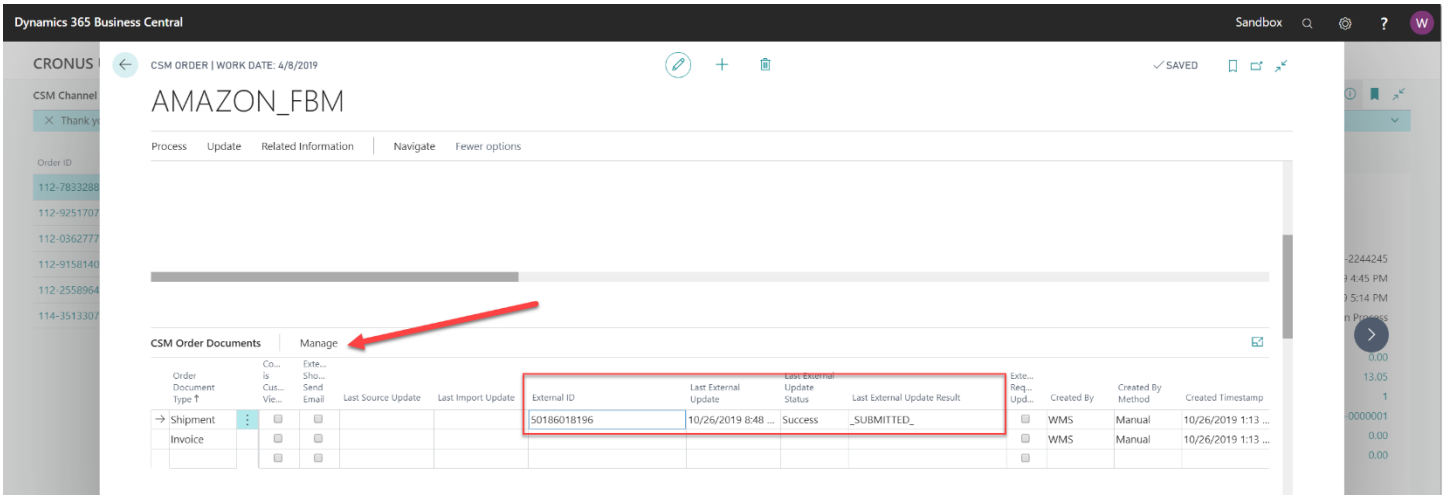
CSM, at Shipment Posting Time, captures the Shipment Information and prepares it to be sent to Amazon.



The information can be viewed in the Channel Order Documents FastTab of the Channel Order Card.

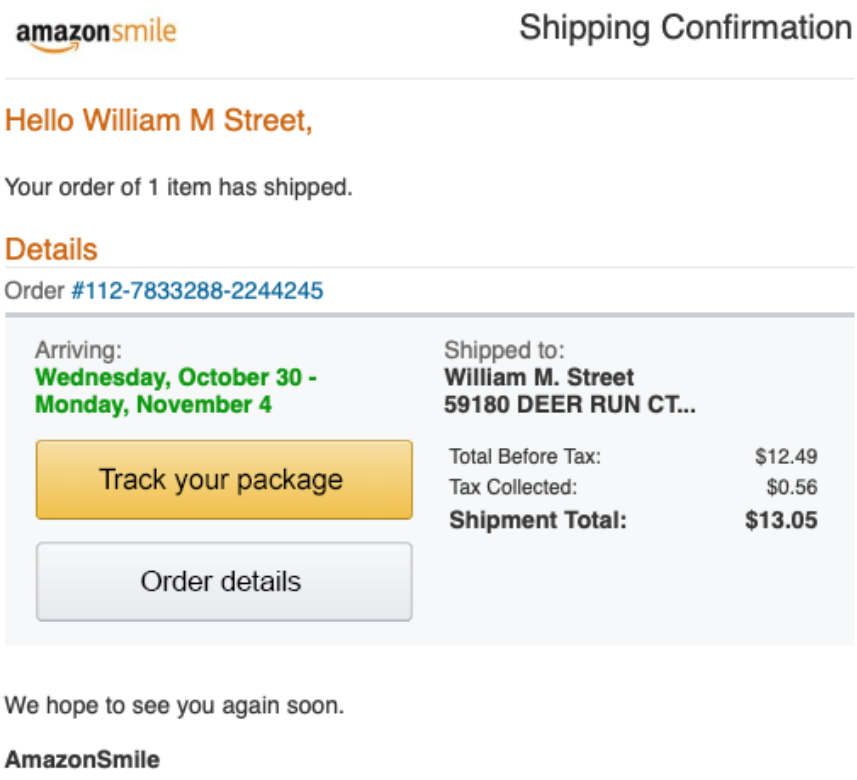


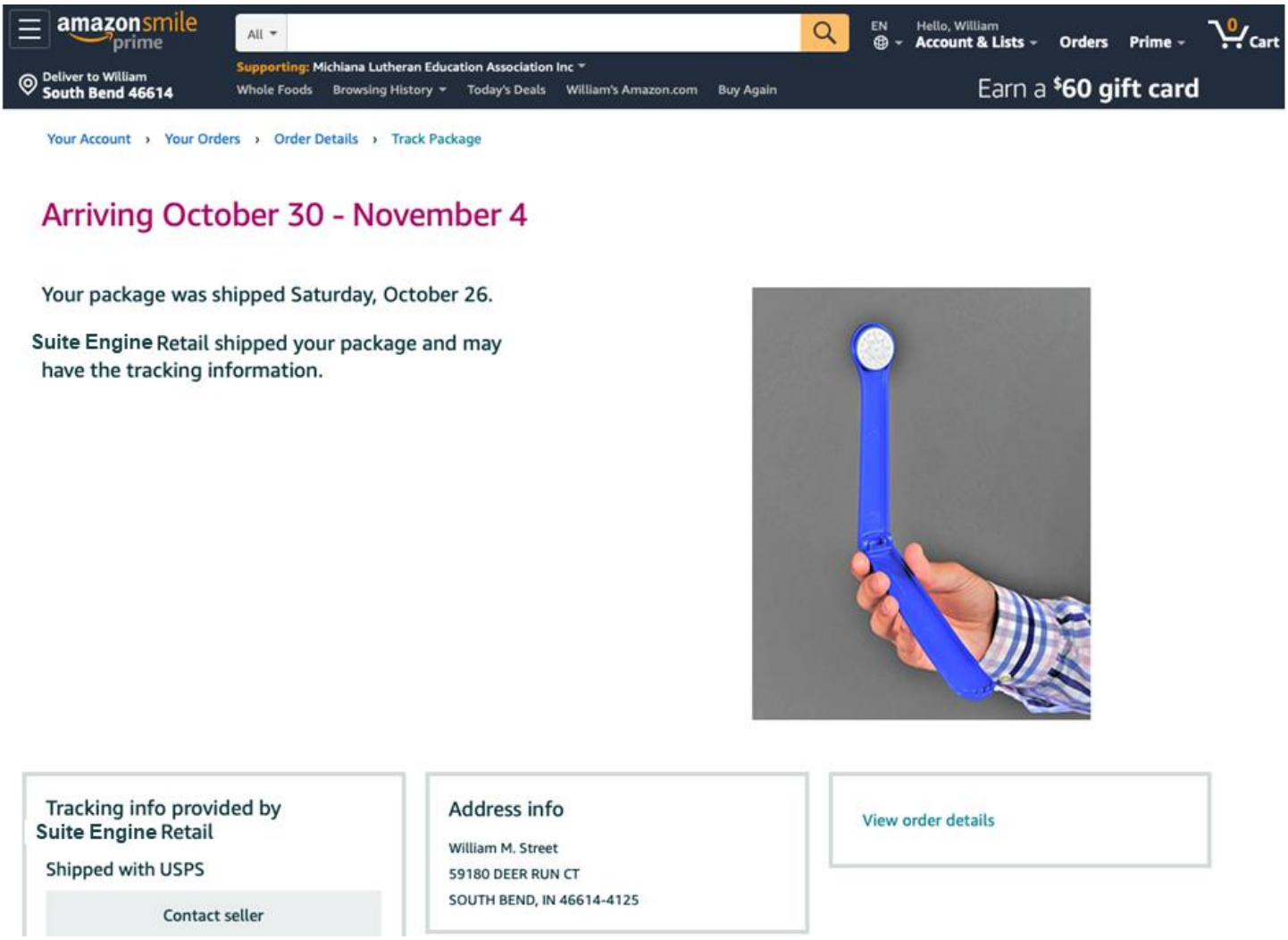
The CSM Automation List can be configured to send shipment information on a schedule, or he user can manually send a single shipment by selecting the Shipment Line, and executing the Send to Channel Button in the Manage section of the CSM Order Documents FastTab.



Once the information is sent to Amazon, the Last External Update information will populate.

The Buyer of the Backscratcher received this communication from Amazon based on the information that CSM sent to Amazon.





Deleting Channel Orders

If necessary, an individual channel order can be deleted from the CSM Channel Orders list or card by choosing the Delete action in the ribbon. It is also possible to select multiple orders in the CSM Channel Orders list and delete them at once by choosing the Delete Selected Channel Orders action in the ribbon. Business Central will ask you to confirm that you want to delete the selected orders, and if you answer Yes, proceed with the deletion. Business Central will not delete any selected orders that:

- Have an associated sales order in Business Central, and
- Have a CSM BC order status value that is not Complete.

Once the deletion process is completed, the application will inform you of how many orders have been deleted (this number may be less than the originally-selected quantity if any of the selected orders failed to meet the criteria mentioned above).

It is important to note that deleted CSM channel orders can be re-created in Business Central by opening the relevant sales channel record, setting the starting order retrieval date to reflect a date prior to the orders' creation, and then re-running the channel's automation routine. This is useful in scenarios where a missing or incorrect setup issue in a sales channel environment resulted in a large quantity of incorrect CSM channel orders within Business Central. If this occurs, the user can select all of these channel orders and delete them at once using the bulk delete functionality described here, correct the problem within the sales channel, then re-import all of the orders into Business Central.

Creating Sales Returns

You can generate a sales return order from any CSM order that has been fully or partially shipped:

1. Open the **CSM Channel Orders** list, then select an order for which the return will be issued.
2. Choose the **Create Sales Return Order** action in the ribbon on the **CSM Order** page.
3. CSM creates a new sales return order and updates the CSM order's sales return status to Open. You can navigate to this return directly from the CSM order by selecting the **Outstanding Return Order Amount** link in the **Sales Channel Order Statistics** FactBox.

As you process the return in Business Central, the **Refund Information** FastTab on the **CSM Order** page will update to reflect the current stage of the return order. In addition, the outstanding return order amount, posted shipments, and total amount credited values in the **Sales Channel Order Statistics** FactBox will be updated accordingly.

> ***Note:*** *CSM for Amazon does not currently support direct return/refund integration. When a return order is posted in Business Central, it is not communicated to Amazon. Feasibility as to whether Amazon's APIs support this functionality is under investigation.*

Archiving Channel Orders

It is possible to archive completed and cancelled channel orders. When a channel order is archived, it is moved from the list of active orders to a separate list of archived orders. In this way, the list of active orders is more manageable, as it presents only current, actionable orders. Order archiving accommodates the CSM order header, CSM order lines, CSM order line options, and CSM order documents. All field values are copied exactly as-is from the current order to the archive order.

CSM Setup

Archiving setup is performed on the CSM Setup page's Archiving FastTab. The fields on this FastTab serve as default values which are copied to newly-created CSM sales channels. Note that changes to these default values will not update any existing sales channels.

To set up channel order archiving defaults, fill in the fields as follows:

- Archive After Days: enter the number of days a CSM channel order should remain active prior to archiving. The value in this field is applied to a channel order's last source update value in relation to Business Central's work date to determine whether that order should be archived. By default, this value is set to 30 days, but you can

enter a greater value if you want to archive your orders on a less frequent basis. It is not possible to define an archive period of less than 30 days.
- Auto Channel Order Archive: enable this option to instruct Business Central to automatically archive CSM channel orders that meet the appropriate criteria.

Sales Channel Setup

Corresponding archiving fields can be found on the Order Management FastTab on the CSM Sales Channel page. If default archiving values have been defined on the CSM Setup page, Business Central will automatically copy these defaults to newly-created sales channel records, but these values can be changed on a channel-by-channel basis, if desired. This allows users to archive different sales channels according to different frequencies or enable this functionality for selected channels only. It is also necessary to enter these values on any sale channel records that existed prior to setting up order archiving.

To set up channel order archiving, fill in the fields as follows:

- Archive After Days: enter the number of days a CSM channel order should remain active prior to archiving. The value in this field is applied to a channel order's last source update value in relation to Business Central's work date to determine whether that order should be archived. By default, this value is set to 30 days, but you can enter a greater value if you want to archive your orders on a less frequent basis. It is not possible to define an archive period of less than 30 days.
- Auto Channel Order Archive: enable this option to instruct Business Central to automatically archive CSM channel orders that meet the appropriate criteria.

Housekeeping Automation Setup

CSM uses the existing "housekeeping" automation record to archive completed and cancelled channel orders. To view a list of CSM automation records, choose the icon, enter "CSM Automation List," and then choose the related link. On the CSM Automation List page, locate, and review the housekeeping CSM automation record. From this list, you can make any necessary changes.

Channel Order Archiving

When the housekeeping automation routine runs, Business Central will archive any CSM orders that meet the following criteria:

- The order's assigned sales channel code has archiving enabled.
- The order's CSM BC order status value is either Complete or Cancelled.
- The order's Last Source Update date falls outside of the related sale channel's defined archiving period in relation to Business Central's work date.

For example, consider a scenario where our work date is 03/26/2021 and we have a number of channel orders whose sales channel has a defined archiving period of 30 days. When we run the housekeeping automation routine, the application will archive or not archive channel orders as follows:

Last Source Update	Relation to Work Date	Archive?
03/27/2021..	Future	No
03/26/2021	Current Day	No
02/25/2021..03/25/2021	Less Than 30 Days	No
02/24/2021	Equals 30 Days	Yes
..02/23/2021	Greater Than 30 Days	Yes

Note: *if a CSM order that has been archived by CSM is modified or adjusted in the connected eCommerce channel, CSM will retrieve and attempt to re-archive that order as part of its automation routines. In such a scenario, a suffix will be appended to the archived order's ID. For example, suppose we archived CSM order 1234 in Business Central. This order was modified in the eCommerce channel and retrieved by CSM a second time. When this order is archived by CSM, it will be assigned an order ID of 1234-01. If this process was repeated, subsequent archive records would be numbered 1234-02, 1234-03, and so forth.*

Viewing Archived CSM Channel Orders

When a CSM channel order is archived, it is removed from the list of active CSM orders and a new archive record is created. These archived CSM orders can be accessed from the CSM Administrator role center. Choose the "Posted Documents" action at the top of the role center, then choose the Archived CSM Channel Orders action to see a list of archived orders. From here, you can open a specific archived order to review it.

Archived CSM orders contain the same layout, FastTabs, FactBoxes, and fields as active CSM orders. You can also view any existing order line option and archive document line records by selecting a line on the **Channel Order Archive Lines** or **CSM Order Archive Documents** FastTab, then choosing the **Manage** action in the ribbon and choosing the relevant option.

As with active CSM orders, you can navigate to related Business Central orders from an archived CSM order:

- To access related shipments: drill down on the Posted Shipments link in the FactBox.
- To access related invoices: drill down on the Total Amt. Invoiced link in the FactBox.

Troubleshooting CSM Activities

There are times where CSM processes will fail to occur or not perform as expected. In these scenarios, it may be necessary to troubleshoot the issue. Typically, this research will be performed by a support technician at Suite Engine or a Suite Engine partner, but in order to better assist this individual with his or her troubleshooting activities, you may be asked to supply additional details from Business Central. It is helpful, then, to be aware of the following troubleshooting tools in CSM:

- CSM API Messages: each sales channel has a list of related API functions for different activities such as creating new products, updating existing products, retrieving order information, sending inventory data, and so on. Whenever an API function is executed, a new CSM API message record is created.

To further assist in troubleshooting activities, the Last API Message Processed field on the CSM Order Channel page presents a link to the most recent API message that was generated for a channel order. In the event that a channel order fails to process, this link allows someone looking into the issue to quickly access the most recent API activity in which the order was involved, where it can then be researched.

- CSM Processing Log Entries: CSM processing log entries are created for every warning, error, new piece of information, or change to existing information that occurs through the execution of an API function. To understand how CSM API messages and CSM processing log entries relate to each other, a CSM API message might be generated when a function to retrieve a new channel order is executed, while separate CSM processing log entries would be generated to reflect the creation of that new order, the entry of a customer on that order, the entry of a shipping address on that order, the entry of a payment method on that order, and so forth. In this way, a single CSM API message can be related to hundreds of CSM processing log entries.

In some troubleshooting scenarios, it is necessary to review the specific CSM processing log entries that were created as part of a routine. While it is possible to access a list of all CSM processing log entries in Business Central, a better option is to open the relevant CSM API Message card and choose the Related CSM Processing Log Entries action in the ribbon. This will present a list of CSM processing log entries that is filtered by the relevant CSM API message ID. From here, additional filters can be set to further streamline the information, and the necessary research can occur.

Reprocessing CSM API Messages

There may be scenarios in which it is necessary to reprocess an API message response. For example, a connectivity issue might create an issue with an API message as it is being processed, leading to an incomplete activity. In such a scenario, the message may need to be edited and then reprocessed.

To edit and reprocess an API message:

1. Choose the icon, enter **CSM API Messages**, and then choose the related link.
2. Choose the CSM API message record you want to edit and reprocess. You can only edit CSM API messages with a message status of *Response*.
3. Choose the **Actions** ribbon, then choose the **Edit Response Message** action. This action will only be visible for CSM API messages with a message status of *Response*.
4. In the **CSM Reprocess API Message** window, make the necessary changes to the CSM API message's response text.
5. Choose the **Actions** ribbon, then choose the **Reprocess** action.

CSM will reprocess the CSM API message according to the new response information. If the record is successfully processed, its status will be updated accordingly.

Appendix A: Amazon Tax Collection Methods

Amazon employs multiple tax collection methodologies. When a sale is placed, Amazon first identifies whether the transaction is taxable. If so, Amazon then makes a determination as to how these taxes will be collected:

- Marketplace Tax Collection ("MTC"): Amazon will calculate, collect, and remit tax to the relevant tax authority on your behalf.
- Tax Calculation Services ("TCS"): Amazon will calculate tax and disperse this calculated amount to you. You are then responsible for remitting these taxes to the proper tax authority.

To illustrate the differences between these tax collection methods, consider a simple scenario where you have a sales transaction of $100, with a calculated sales tax of $15:

- MTC: Amazon would remit the $15 on your behalf. You would receive a payment of $100, which represents your sales revenue.
- TCS: Amazon would include the calculated tax in your payment. This payment would total $115, comprised of $100 in sales revenue and $15 of tax liability.

The determination as to which method will be employed for a given sale is based on Amazon's tax collection rules for the state in which the transaction occurred. For more information on Amazon's tax collection methods and policies, see here.

Although MTC amounts are handled by Amazon and not a liability, it is still advantageous to record these amounts for reporting and auditing activities. For this reason, CSM allows you to assign separate accounts for MTC and TCS tax amounts. This activity is performed on the **Order Management** FastTab of the sales channel record. You can assign a dedicated G/L account, item, resource, fixed asset, or item charge to MTC and TCS tax activities that occur within that channel. In this way, you can track these tax amounts separately from one another. For example, you might direct CSM to record TCS tax in a liability account, while MTC tax is reported to a dedicated contra account.

When Amazon employs the MTC methodology for tax collection, it automatically assigns a value of *MarketplaceFacilitator* to the transaction. This value is present is entered in the **Tax Collection Model** field on the CSM channel order line that is created when the order is retrieved from Amazon. When a sales order is generated from the channel order, CSM creates sales lines for tax amounts according to the following methodology:

1. What is the assigned sales channel's sales tax behavior?
   - If the sales tax behavior is *None*, no sales tax will be added to the sales order. The process ends.
   - If the sales tax behavior is *Line*, dedicated sales tax lines will be added to the sales order. Proceed to step 2.
2. Does the channel line have an assigned item tax, shipping tax, or gift wrap tax value?
   - If these values are all zero, no sales tax will be added to the sales order. The process ends.
   - If any of these values is greater than zero, the sum of these tax amounts will be added to the sales order as a dedicated sales tax line. Proceed to step 3.
3. What is the channel line's assigned tax collection model?

- If the tax collection model is *MarketplaceFacilitator*, the sale channel's defined MTC account will be assigned on the sales line that is created for sales tax.
- If the tax collection model is not *MarketplaceFacilitator*, the sale channel's defined TCS account will be assigned on the sales line that is created for sales tax.

Appendix B: Role Center Headline Data

The content of the Role Center headlines is stored in this new table. This table is regularly updated by Suite Engine as part of CSM updates. This appendix is being included to provide information on this table and how it supplies the Role Center with headline information.

Note: *End-users will not need to manually maintain this data in the headline table in Business Central.*

Search for "**Role Center Headline Data**" to locate this information.

Field	Description	Value Type	Example Value
Edit List	This is the ability to edit the Role Center Headline Data within the table.	N/A	N/A
Update CSM Role Center Headlines	This will populate CSM Role Center Headline Data with default info to display in the CSM Administrator Role Center page.	N/A	N/A
Code	This is the unique value to identify this headline.	character limit- 20 all caps alphabetic and/or numeric value	NEWTOCSM
Headline Name	This is the name of the headline for user reference.	Alphabetic value first letter of the values in this cell are uppercase, while they are lowercase in others.	New to CSM Insight
Status	Status of the headline used to determine if it is visible.	Pending/ Active/ Active Dates/ Inactive	Active
Starting Date/Time	The starting time stamp for displaying the headline. This is only relevant if Status is Active Dates.	M/D/YYYY	5/3/2022
Ending Date/Time	The ending time stamp for displaying the headline. This is only relevant if Status is Active Dates.	M/D/YYYY	5/4/2022
Display Order	Indicates the order in which the headline will appear in the role center rotation.	character limit- 10 numeric value	10

Field	Description	Value Type	Example Value
Payload Text	This is the main text of the headline.	character limit- 75 alphabetic and/or numeric value first letter of each word is uppercase.	New to CSM? Click here to start using Channel Sales Manager
Qualifier	The title of the headline.	character limit- 50 alphabetic and/or numeric value	New to CSM
Click Action Type	This indicates what will happen when user clicks on the headline text. None means no action; Hyperlink will open the webpage specified in the Hyperlink field and Function requires a Codeunit and function in the Action Processing fields.	None/ Hyperlink/ Function	Function
Hyperlink	The optional URL to navigate to by clicking a link in the headline.	N/A	N/A
Action Processing Function CU	Required if Click Action Type is Function, this is the Object Number of the Code Unit used to process the action.	Numeric value	70338200
Action Processing Func. CU Name	This shows the name of selected Codeunit in Action Processing Function CU.	Alphabetic value first letter of each word is uppercase.	CSM API Utility Functions
Action Processing Func. Name	This is required if Click Action Type is Function, this is the Function Name in the Code Unit used to process the action.	All caps alphabetic value	HEADLINEACTIONOPENCSMSETUP

***Note**: If role center headlines are blank within Business Central refresh the page directly in your browser. Do not use the Update CSM Role Center Headlines tab to refresh the page.*