CSM FOR BIGCOMMERCE

An App by Suite Engine

Microsoft Dynamics 365 Business Central

Order Management Setup

Release: 2.0

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ORDER MANAGEMENT SETUP

Channel Sales Manager (CSM) for BigCommerce | Release: 2.0

(D365 Business Central Version 20.0 (Platform 20.0.37114.39012 + Application 20.0.37253.39101)

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

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

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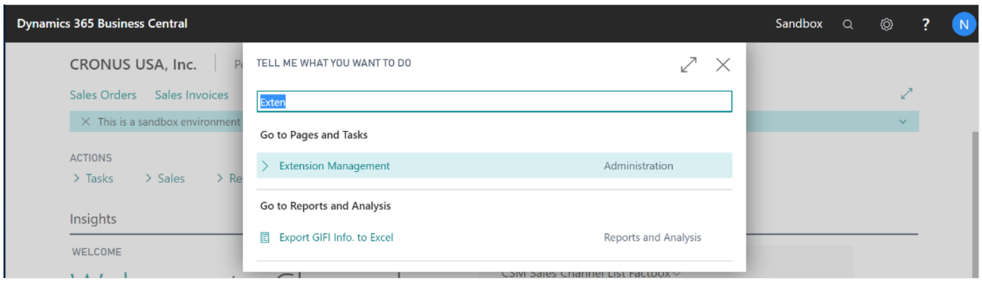
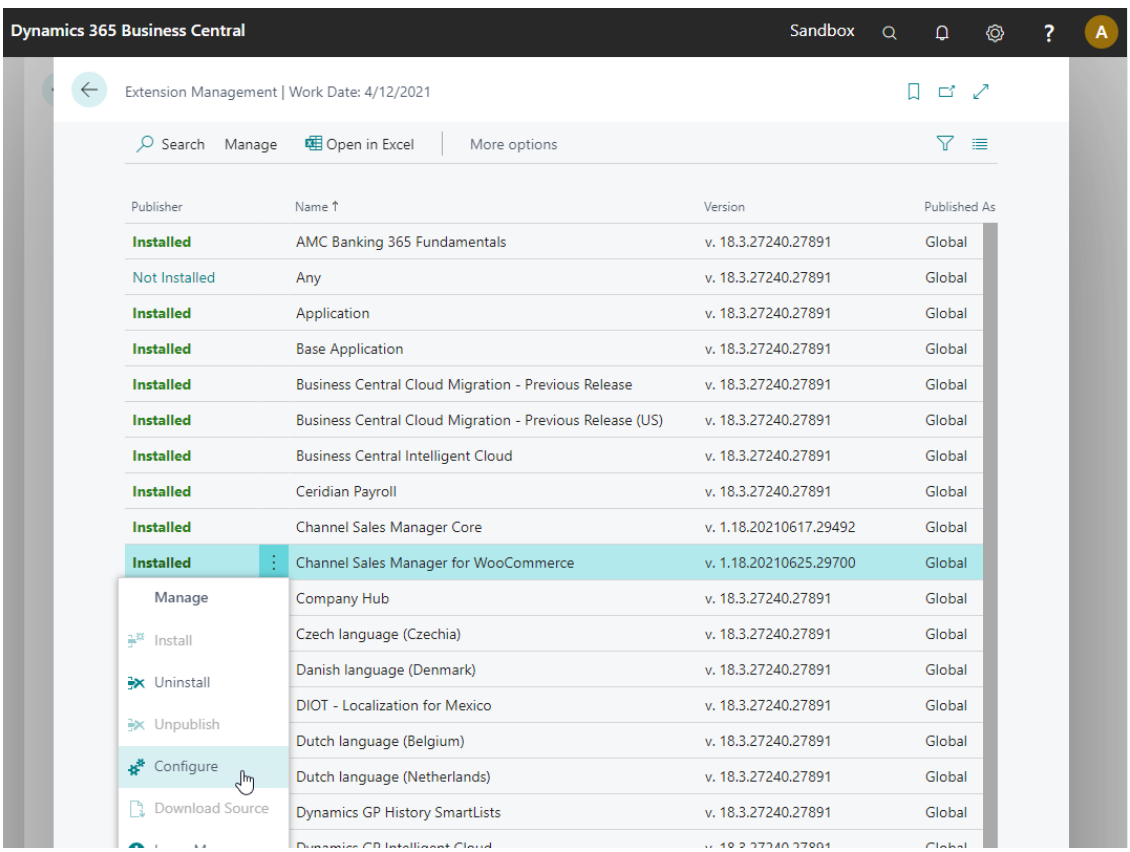
CSM Initial Setup

Manage the CSM for BigCommerce Extension

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



Find “Channel Sales Manager for BigCommerce” in the list of extensions, select the ellipsis (three vertical dots), and then select “configure” from the drop-down menu.



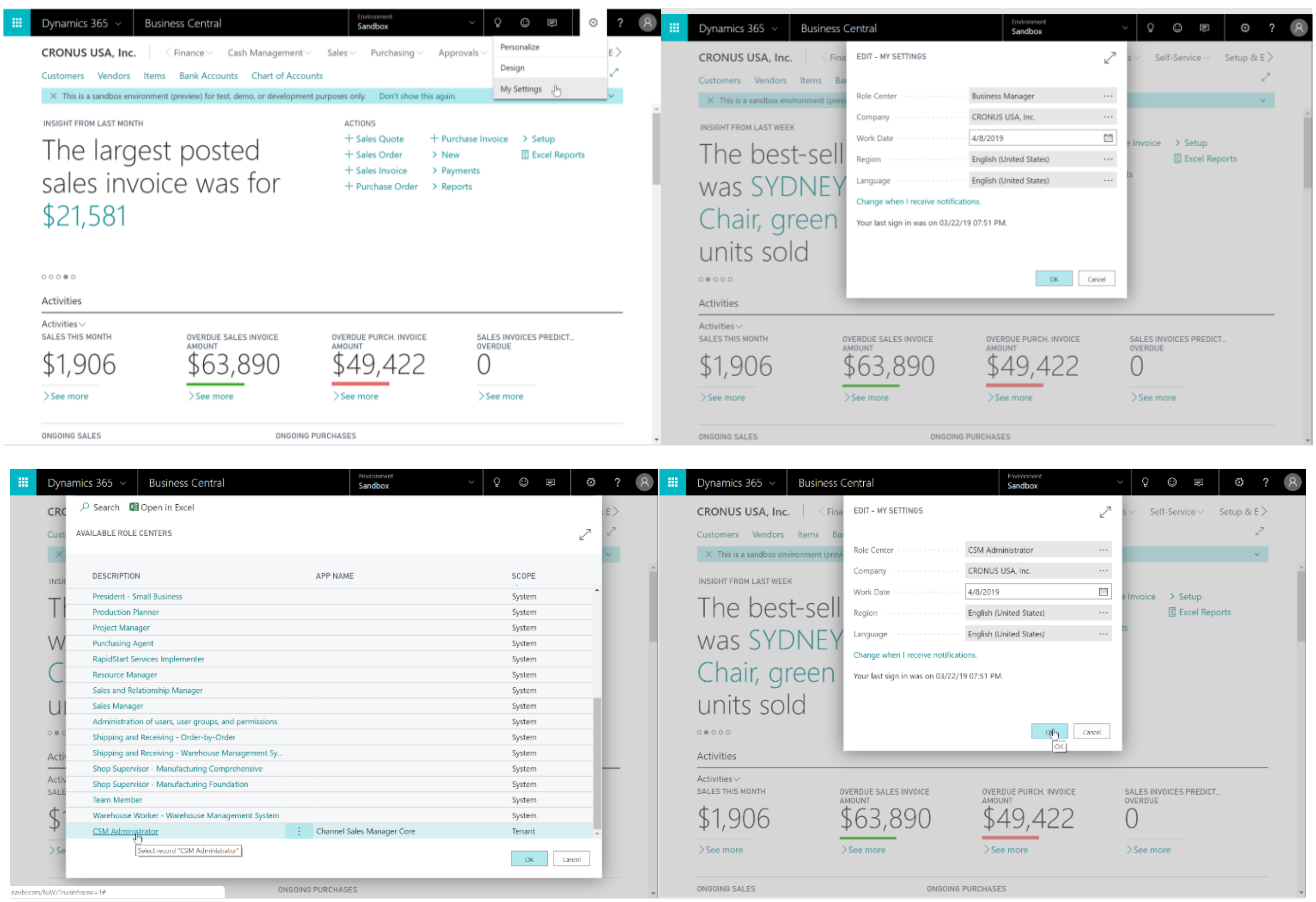
Ensure that the “Allow HttpClient Requests” switch is on.

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."



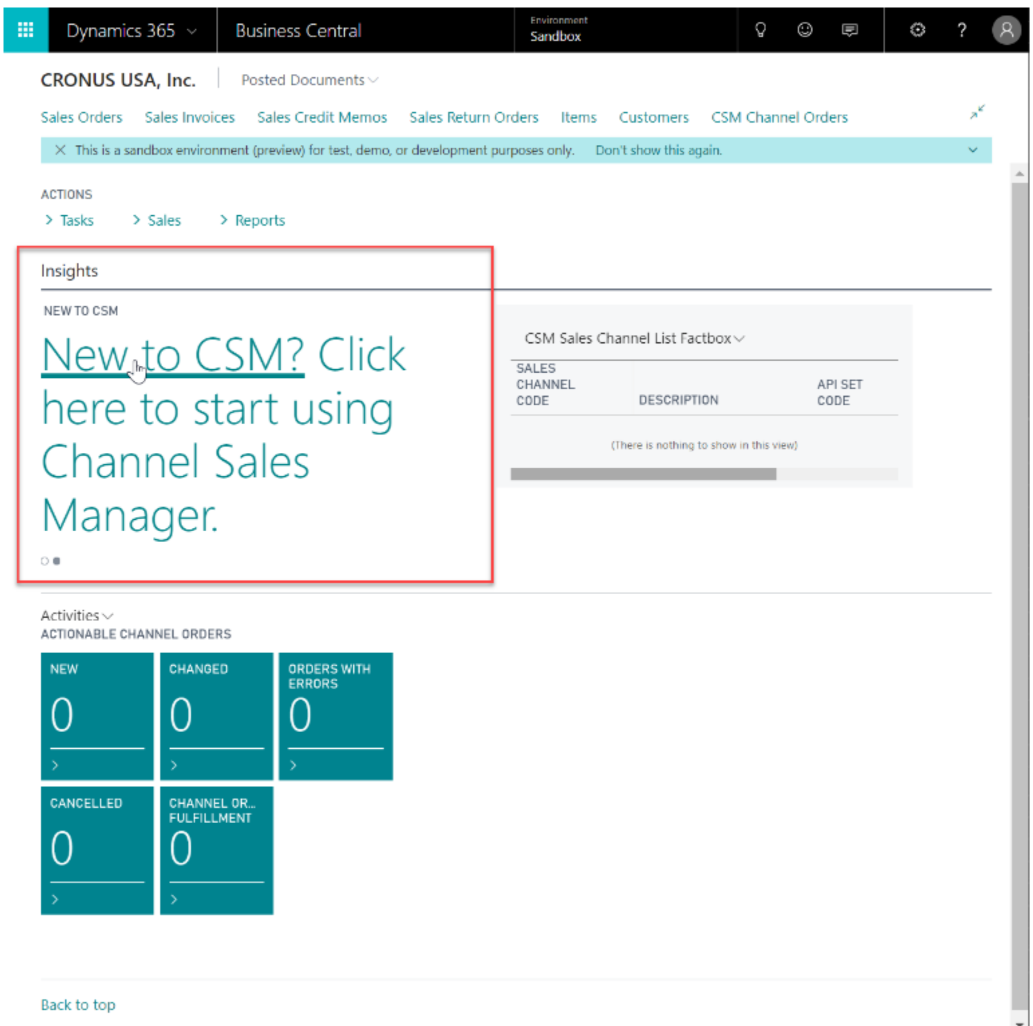
- Your screen should now refresh to the CSM Administrator Role Center.

CSM Setup

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

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 choosing the icon 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.



Regardless of the method you choose, you should end up on the CSM Setup page.

Creating and Managing Your CSM Subscription

If CSM for BigCommerce 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.

Choose the 'Subscriptions' ribbon > and select the 'CSM for BigCommerce 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 BigCommerce. If you wish to use CSM for BigCommerce 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 BigCommerce 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 BigCommerce 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. Although rare, there may be situations where a CSM subscription account exists but no account details are present in Business Central; in such a scenario, it is necessary to link the Business Central environment to the appropriate subscription account by choosing the Actions ribbon, then choosing the "Link to Existing Customer" action. This will open a separate page that prompts the user to supply a:

- 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 BigCommerce.

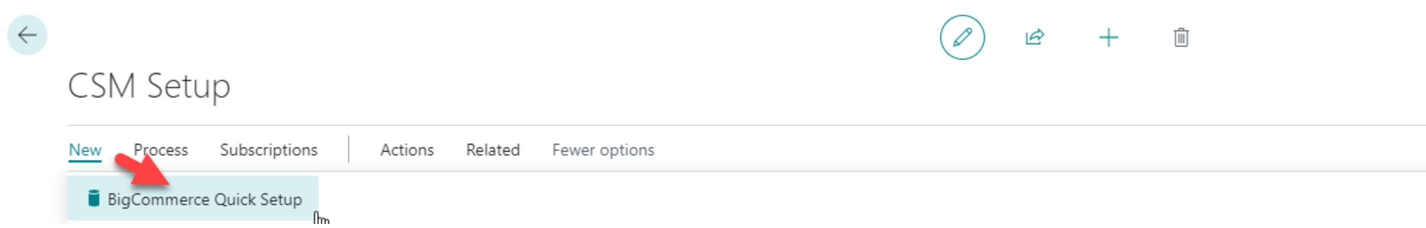
After the initial entry of billing details on the CSM Setup page, these values become un-editable. If it is necessary to modify any of this information, you can do so on the Suite Engine Subscriptions page. This page presents customer information and details about all Suite Engine products that have been licensed under the customer account. To change a value such as the customer name, address, e-mail, or 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 BigCommerce Setup Wizard

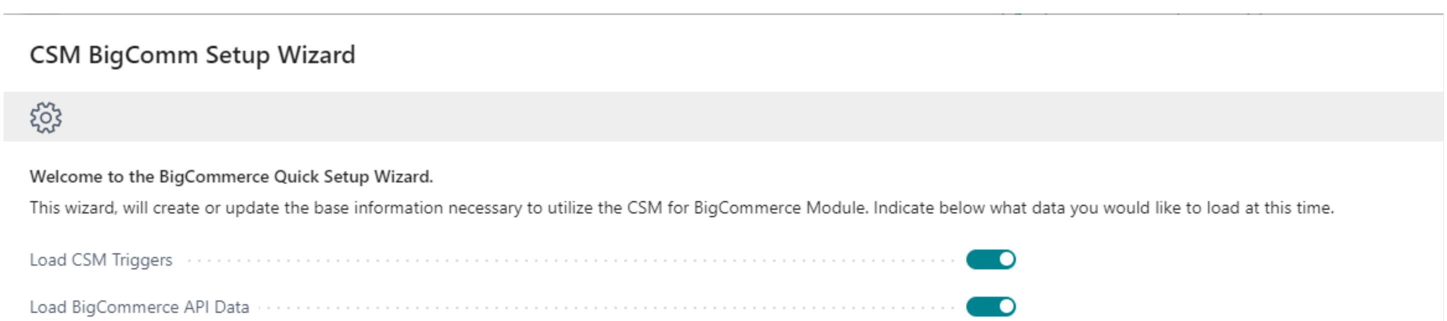
Once you have set up a trial subscription, you are ready to set up your CSM for BigCommerce solution. While it is possible to manually enter the initial setup values, CSM for BigCommerce comes with a setup wizard that streamlines this process; it is recommended that you use this setup wizard to create your sales channels.

Select New -> BigCommerce Quick Setup.

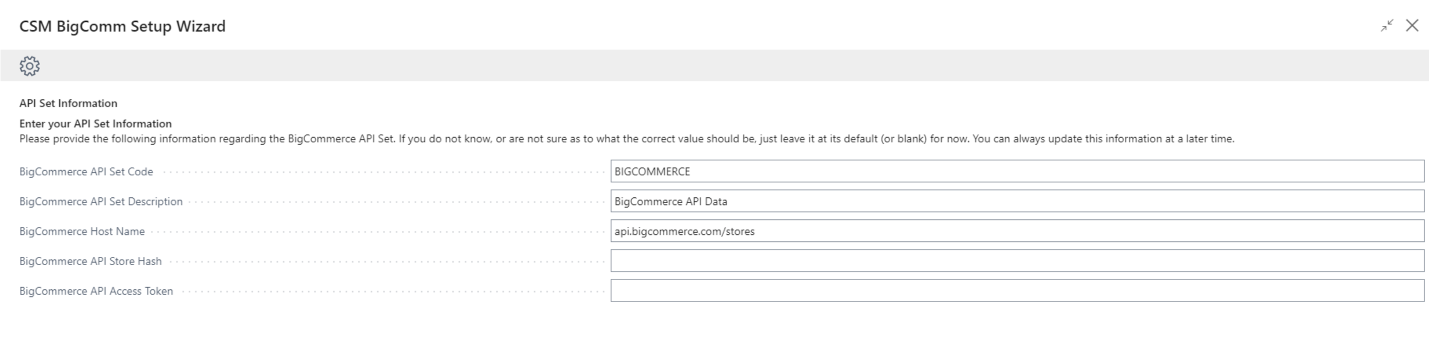


This will start the BigCommerce Setup Wizard.

On the first page of the wizard, turn on the switches.

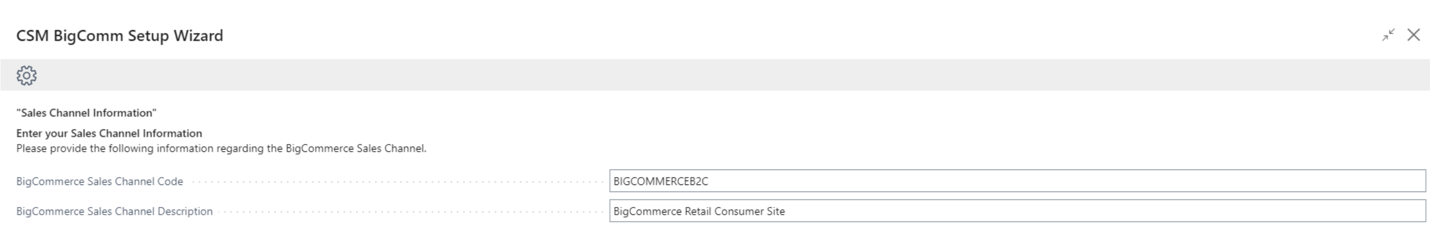


For the second page of the wizard, enter information relating to your BigCommerce server.



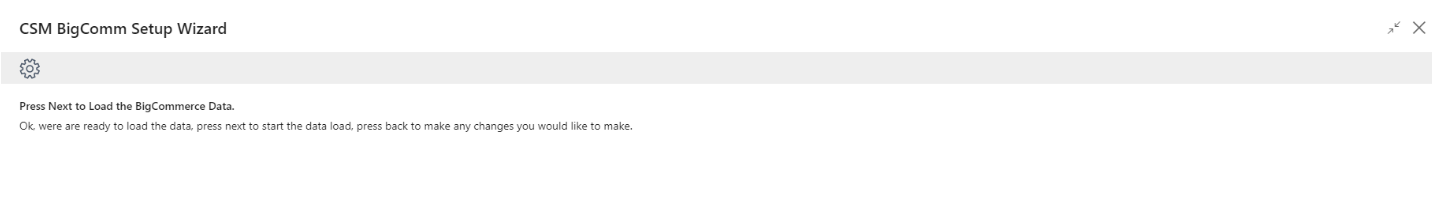
Field	Description	Example Value
BigCommerce API Set Code	This is a unique code that identifies the API set. It can be any value you wish, but we recommend naming it something meaningful that describes the external source the API set communicates with.	BIGCOMMERCE
BigCommerce API Set Description	This 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, BigCommerce 2.xx, Amazon, etc.) and may even require a 2nd API set for an additional BigCommerce 1.x instance you may deploy.	BigCommerce API Data
BigCommerce Host Name	This is the host URL endpoint for soap services on your BigCommerce server. Normally it is *api.bigcommerce/stores*.	api.bigcommerce/stores
BigCommerce API Client ID	Enter the unique store ID that identifies your storefront on the BigCommerce platform. It can be obtained by reviewing your store's URL and locating the value that follows the host name. For example, if your store's URL is *api/bigcommerce/stores/123456*, the client ID would be *123456*.	Obtained from the BigCommerce store's URL..
BigCommerce API Client Secret	This is the BigCommerce access token that CSM use to authenticate API calls.	Use the API key you defined on BigCommerce for the User ID

On the third page of the wizard, enter information relating to your BigCommerce Sales Channel (Store).



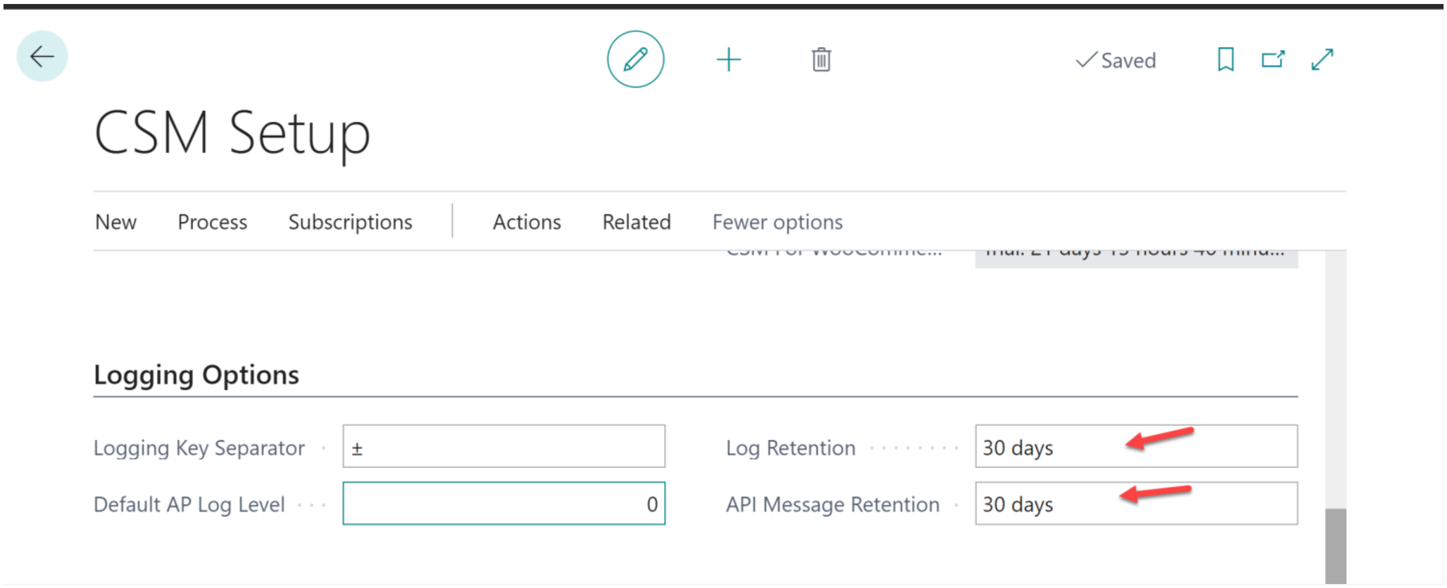
Code	This is unique code that identifies the Sales Channel. It can be any value you wish, but we recommend naming it something meaningful that describes the Sales Channel.	BIGCOMMERCEB2C
Description	This is a text description of the Sales Channel.	BigCommerce Retail Consumer Site

The fourth page of the wizard is a confirmation page. If you choose “Next,” CSM will load and setup the BigCommerce data. If you press “Back,” you can make changes to what you have already entered. Pressing the “X” on the upper right of the wizard window will cancel the setup.



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.

Set Up Channel Credentials

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.

You can identify a sales channel's credentialing sales channel in the **Credentialing Sales Channel** field in the **API Data** FastTab on the **CSM Sales Channel** card. If this value is left blank, CSM will use the channel as its own credentialing channel.

You can view the credentials that have been defined for a sales channel by choosing the **Actions** tab in the ribbon, selecting the **API and Automation** group, and then choosing the **API Credentials** option. If you entered credentials when you were creating the sales channel via the setup wizard, the necessary API credential records will have been automatically created. If this information was not entered in the setup wizard (and you do not wish to use existing credentials), these records must be manually set up on this page.

Verify Channel Connectivity and Retrieve Your First Channel Orders

At this point in time, if your host name and credentials are valid, you should be able to conduct a small communication test. After returning to the role center, select the new Sales Channel the setup wizard created.

1. Choose the icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the sales channel record for which you want to test communications.
3. Choose the **API** ribbon, then choose the **Test Channel Communication** action.

CSM will notify you if the test communication was successful or failed.

If your communication test is successful, you are now able to retrieve orders from BigCommerce. Each API set for CSM has a series of automation routines that manage different activities, including the retrieval of orders from your external BigCommerce platform. These automation routines are configured to run at a scheduled frequency, and each one has a last run timestamp that is updated each time the automation routine is run. When a data retrieval process is initiated, Business Central uses an automation routine's scheduled frequency in relation to its last run timestamp to determine whether the routine should be included.

For example, suppose we successfully run our API automation routines at 10/01/21 12:00 PM. The last run timestamp for these automation routines will be updated with this date and time. If our scheduled frequency for these routines is 10 minutes, they would be included as part of the next data retrieval process to run at 10/01/21 12:10 PM or later.

Because the last run timestamp for these automation routines is automatically updated by the application, it is preferable to allow the system to manage these values. However, it is necessary for you to manually enter a desired starting date and time for order retrieval prior to the first time you want to retrieve data from BigCommerce. This starting date and time should be viewed as the cut-off point for when you want to manage BigCommerce transactions with CSM in Business Central as opposed to in your external environment.

> ***Note:*** *it may be necessary on occasion to manually adjust retrieval dates and times for troubleshooting or re-processing activities. Such changes should be performed by or under the guidance of someone who understands the ramifications of making these adjustments.*

If you have multiple sales channels that share the same API set, you can set the initial starting date and time from any of these channels, and the setting will apply to them all:

1. Choose the icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open any sales channel record that has the API set for which you want to set a starting date for order retrieval.

3. On the **CSM Sales Channel** page, choose **Related** ribbon, then choose the **Starting Order Date Retrieval** action in the **Setup Actions** menu.
4. On the **CSM User Input** page, enter your desired starting date and time.

   Note: *We strongly recommend setting your BigCommerce site's time zone setting to UTC*.

5. Choose the **OK** button.

It is possible to configure the order retrieval automation routines to automatically create an associated Business Central sales order when a new CSM order record is created. You can control this process as part of your initial order retrieval by defining a start processing date at the sales channel level. When the order retrieval action is executed, CSM will still retrieve any orders that fall on or after the starting date and time defined in the steps above, but only those orders that fall on or after their sales channel's defined start processing date will have corresponding sales orders created for them. This can be helpful if you are working with multiple sales channels, as it allows you to set different cut-off dates for sales order creation on a channel-by-channel basis.

To set a starting processing date and time for a sales channel:

1. Choose the icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the sales channel record for which you want to assign a starting date and time.
3. In the **Start Processing Date Time** field, enter the order date and time for which CSM will start to create Business Central sales orders for retrieved channel orders.

When you have finished specifying starting dates and times for your sales channels, you can retrieve orders into Business Central. From the CSM Administrator Role Center, choose the **Run Order Automation Now** action. The related API automation routines will be run by CSM, and any BigCommerce orders that fall on or after the API set's defined starting date and time will be retrieved into Business Central as CSM orders. If a CSM order's sales channel has a defined start processing date and time, CSM orders that fall before this date will be assigned a status of complete and become ineligible for further activity. Channel orders that fall on or after the channel's start processing date will remain open, and, depending on setup, corresponding Business Central sales orders will be automatically created as part of the order retrieval process.

CSM Functional Settings and Cross References

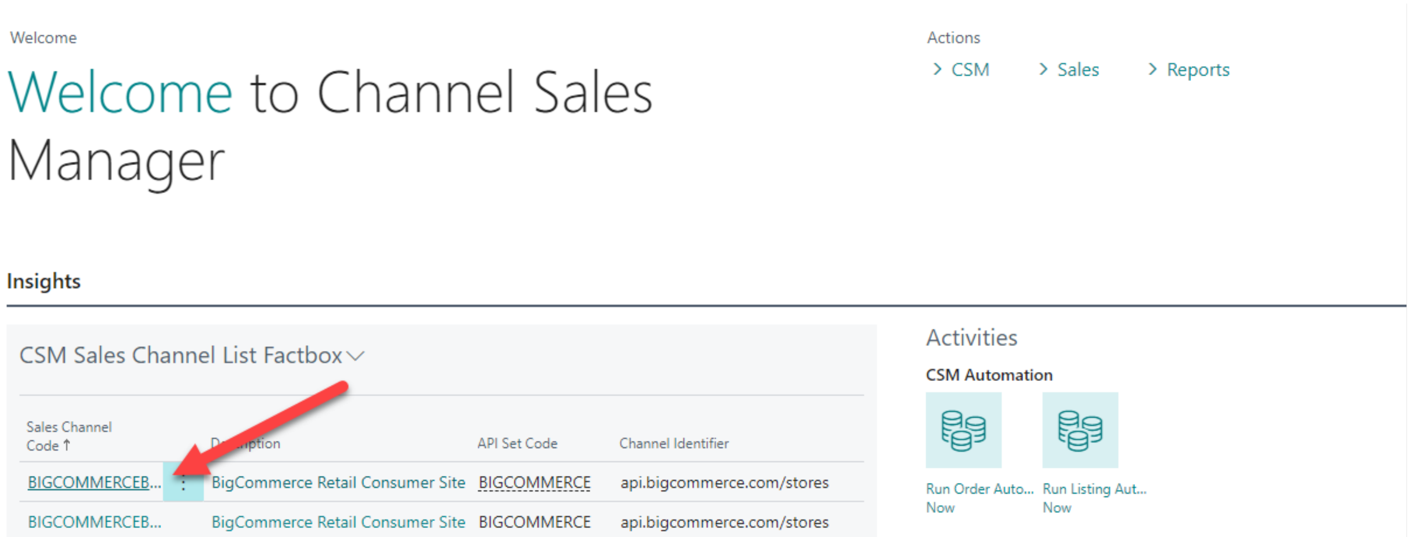
This section will go thru the settings that will customize your CSM experience and cross reference your data in Business Central to like data in BigCommerce, such as shipping methods, payment types, and customer price groups.

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 eCommerce or marketplace store. For example, if you have 2 BigCommerce Stores defined, one B2C, the other B2B, they would be setup as two Sales Channels in CSM.

If you used the BigCommerce Quick Setup Wizard, your first Sales Channel should have been set up by that process. Let's see how you can tailor your experience with that Sales Channel or create a new one.

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



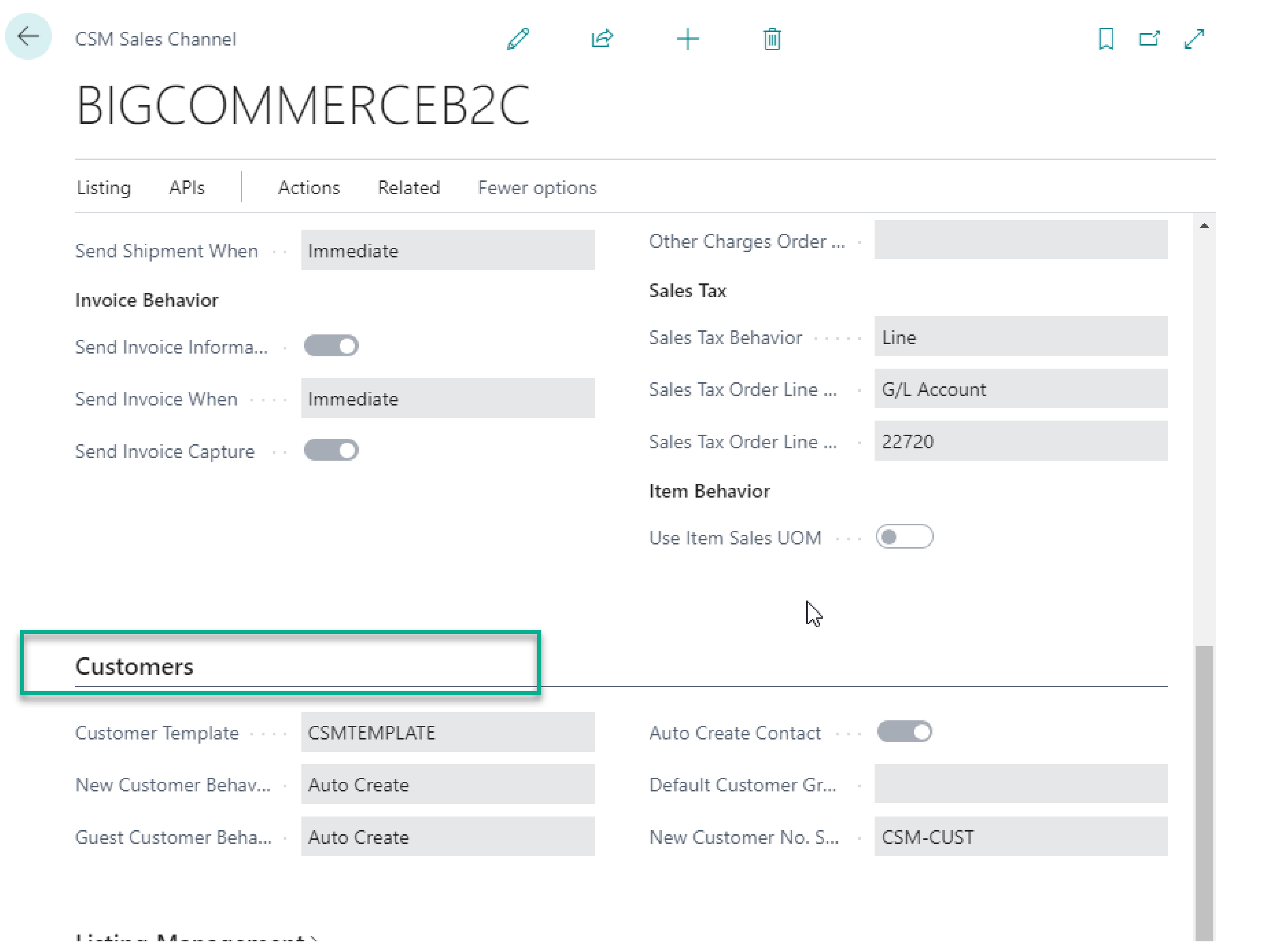
If you want to create a new Sales Channel, simply press the + New button on the CSM Sales Channel list screen.

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

General Fast Tab		
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.	BIGCOMMERCEB2C
Description	This is a text description of the Sales Channel.	BigCommerce Retail Store (B2C)
Order Management Fast Tab		
Field	**Description**	**Example Value**
Inventory Location	The BC inventory location that supplies this store. BC Sales Orders Created for this Sales Channel will specify this inventory location. Listing Management will also use this value in its inventory availability calculation.	BLUE
SO No. Series	The No. Series that should be used for Sales Order Number when building Business Central Sales Orders for this Sales Channel.	CSM-ORD-BIG
Channel Dimension	If populated, this BC Financial Dimension will be set on all BC Sales Orders created from this Sales Channel. Primary Dimension 1.	SALES
Channel Dimension 2	If populated, this BC Financial Dimension will be set on all BC Sales Orders created from this Sales Channel. Primary Dimension 2.	
SO Build Codeunit	The Object number of the Codeunit that should create BC 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
Start Processing Date Time	It is possible to configure the channel order retrieval automation routine to automatically create an associated Business Central sales order as part of the retrieval activity. If you want to set a cut-off date and time as to when this sales order creation is performed against channel orders, you may do so in this field. Retrieved channel orders that fall before this date will be assigned a status of complete and become ineligible for further activity. Channel orders that fall on or after the channel's start processing date and time will remain open and corresponding Business Central sales orders will be automatically created as part of the order retrieval process. **Leaving this field blank will instruct CSM to create sales orders for all retrieved channel orders**. For more information on the initial retrieval of sales channel orders, see here.	
Payment Behavior	Indicates how this sales channel processes payments. It is recommended that the Payments option be selected for BigCommerce sales channels.	Payments
Payment Method Code	The Code of the BC Payment Method which should be used. For Payment Behavior: Payments, this will be the default value. For Payment Behavior: Channel, this will be the Payment method used on all orders.	AUTHNET
Send Shipment Information	Indicates whether CSM should send shipment information to the Channel.	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 shipment information); Manual: Shipment information is sent by a user who presses the Send Shipment Information action button on the Channel Order card.	Immediate
Send Invoice Information	Indicates whether CSM should send invoice information to the Channel.	Yes
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.	Immediate
Send Invoice Capture	If CSM is sending Invoice information, this field tells CSM whether a capture transaction should be sent immediately following the Invoice. For BigCommerce, this is dependent by payment method. If your payment method Behavior is set to payments (which it should be for BigCommerce implementations), CSM uses the Send Invoice Capture value set for each Payment Method (See setting up Channel Payment Methods later in this document).	True
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.	
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.	
Archive After Days	Enter the number of days to retain completed and cancelled CSM Channel Orders before they are moved to the archive. (Example: 30D would keep CSM Channel Orders in the current list for 30 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	Gift wrapping is not supported by CSM in the current release.	N/A
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	Line

	CSM creates the Business Central Sales Order for a BigCommerce Order, a Sales Order Line will be added to account for Other Charges.	
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	Should be 'Line' for BigCommerce. This setting tells CSM how it should handle Sales Tax on orders received from the Channel. If you select None, CSM will build Sales Orders with the Tax Liable flag set to True. In this case, Business Central will calculate the Sales Tax regardless of what BigCommerce calculated and collected. If you select Line, then when CSM creates the BC Sales Order for a BigCommerce Order, the Tax Liable Flag will be set to FALSE (which keeps BC from calculating sales tax), and Sales Order Lines (one for each item, plus lines for tax collected on order level charges (shipping, gift wrap, other charges)) will be added to account for the Sales Tax BigCommerce calculated and collected.	Line
Sales Tax Line Type	If you choose Line as the Sales Tax Behavior, this field specifies the Sales Order Line Type which should be used for the Sales Tax Lines CSM creates. The values can be G/L Account, Item, Resource, or Charge (Item).	G/L Account
Sales Tax Order Line No.	If you choose Line as the Sales Tax Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Sales Tax Line Type chosen).	22720



Customers Fast Tab		
Field	Description	Example Value
Customer Template	A valid BC 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 BigCommerce, if the customer creates a new BigCommerce account when checking out, or for existing BigCommerce customers that have not been defined to CSM (either by setting up the customer as a Sales Channel Customer, or receiving a BigCommerce Order for the customer), CSM considers them a new customer.	Auto Create

	If the behavior is set to Auto Create, CSM will automatically create a new BC customer and associated CSM Channel Customer based on the defined Customer Template, this will occur when CSM builds the BC 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 defined Customer Template customer 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 Business Central customer.	
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. For BigCommerce, if the customer checks out as a guest, CSM considers them a guest customer. If the behavior is set to Auto Create, CSM will automatically create a new BC customer and associated CSM Channel Customer based on the defined Customer Template, this will occur when CSM builds the BC Sales Order from the Channel Order. Even though they checked out as a guest, CSM can still identify the customer if they use the same email address for future orders the customer may place. If the behavior is set to Sales Channel, the CSM will not create a new customer, but will build the sales order to the defined Customer Template customer 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 BC customer.	Auto Create
Auto Create Contact	Indicates whether CSM will also automatically create a BC contact for any new customers CSM creates.	Yes
Default Customer Group	A Customer Group Id to send to the channel for those customers not assigned to a price group.	
New Customer No. Series	Indicates which No. Series should be used when CSM automatically creates a new BC customer.	CSM-CUST

API Data Fast Tab

Field	Description	Example Value
AP Logging Level	Fence used to determine what should be logged	
Import Object Name	The Import Object used for special file imports. Only used in custom situations	
API Channel Identifier	For BigCommerce, this will be the BigCommerce ID of the Store.	api.bigcommerce.com/stores
Website ID	For BigCommerce, this will be the BigCommerce ID of the Website.	api.bigcommerce.com/stores
API Set Code	Identifies the API Set code that should be used for API communication with BigCommerce. This should be the value that you used to setup the BigCommerce API Set in the CSM API Sets section earlier in this document.	BigCommerce

Client ID	For API calls where the URL is store specific, this is the client ID portion of the credentials for the API call.	
Client Secret	For API calls where the URL is store specific, this is the client secret portion of the credentials for the API call.	

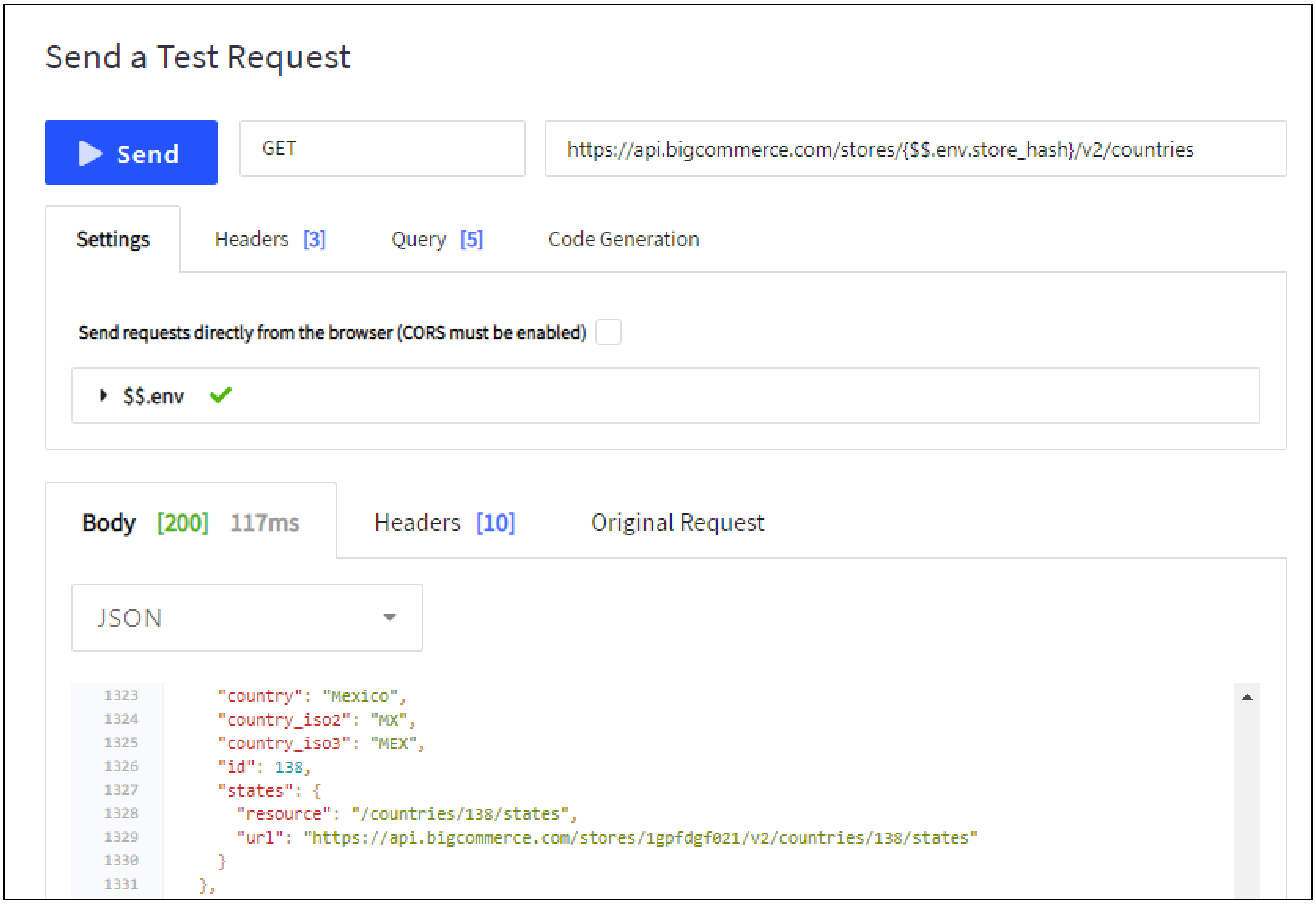
State and Province Cross References

BigCommerce includes the full name of a state/province be used on orders, rather than the two-character codes that are typically used in Business Central. As such, it is necessary to establish cross references between these codes and BigCommerce's expected values. If these cross references are not defined, attempting to update orders from Business Central will lead to errors. For example, if we update an order with a state code of "CT" in Business Central and instruct CSM to update the corresponding order in BigCommerce, the process will fail, as BigCommerce will only recognize a value of "Connecticut."

You can define cross references for a CSM channel by opening the channel card, choosing the Related ribbon, selecting the Setup menu, and then choosing the CSM Cross Reference action. While it is possible to manually enter these cross references values, to streamline this process CSM for BigCommerce includes a *CSMCrossReferenceStateProv.xlsx* file that includes cross references for all US states and Canadian provinces. You can open this file, select and copy all cells, then paste them into the CSM Cross Reference table in Business Central.

If you require additional states/provinces beyond the United States and Canada, you can obtain the proper abbreviations and names via BigCommerce's API reference tool:

1. On the left-hand side of the API reference tool, choose the **Geography** menu option, select **Countries**, and then choose **Get All Countries**.
2. In the **Send a Test Request** area, choose the **Query** tab.
3. For the **Limit** query, enter a value of *250*.
4. Choose the **Send** button in the **Send a Test Request** area.
5. Scroll through the results until you find the relevant country. Take note of that country's ID. In the following example, we can see that the BigCommerce ID for Mexico is 138.



6. On the left-hand side of the API reference tool, choose the **Geography** menu option, select **States**, and then choose **Get All Country's States**.
7. In the **Send a Test Request** area, choose the **Settings** tab.
8. For the **country_id** path parameter query, enter the country ID you obtained in step 5.
9. Choose the **Send** button in the **Send a Test Request** area.

BigCommerce will return the state abbreviations and names for the relevant country. You can now export this information to a spreadsheet program such as Excel, format it appropriately, and then copy this information to Business Central.

Most eCommerce platforms contain some sort of way to identify how products are shipped or delivered to customers. Records will be different from platform to platform. Business Central uses this record type to represent all delivery scenarios, including generic ones such as free shipping and flat rate shipping, as well as specific shipping carriers. By default, Business Central supports several standard delivery methods. Although extensions exist to add delivery methods beyond these provided defaults, it is not possible for Business Central users to manually set up new records.

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 carriers correspond to “shipping quote” records in BigCommerce. BigCommerce requires the setup of “shipping zone” records that represent different geographical shipping regions. Each shipping region then has separate enabled shipping quotes. Shipping quotes represent static delivery scenarios such as free shipping and flat rate shipping, as well as specific shipping carriers.

It is recommended that you use CSM shipping methods to link your Business Central shipping agent codes and your BigCommerce shipping quotes. When shipping information is sent between your Business Central and BigCommerce environments, this association will ensure that the proper order information is maintained in both platforms. Because shipping quotes exist within BigCommerce shipping zones, it is also necessary to identify these shipping zones for sales channel records in Business Central. You can instruct CSM to retrieve shipping zone and shipping quote records from Big Commerce and automatically create corresponding CSM 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 retrieve 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 retrieves shipping quote records from the sales channel’s connected BigCommerce store and creates new CSM shipping method records for each one.

5. In the **Shipping Agent Code** field, use the AssistButton to assign a Business Central shipping agent code to the shipping method.
6. If you want to further associate a particular shipping agent service to the shipping method, use the AssistButton in the **Shipping Agent Service Code** field to assign one of the selected shipping agent’s defined services.
7. 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: *CSM also retrieves shipping zone records from the connected BigCommerce store and assigns them to the CSM sales channel. You can review these records from the CSM sales channel record by choosing the **Related** ribbon, then selecting the **Setup** menu and choosing the **Shipping Zones** action. These records are not associated to corresponding Business Central records and exist purely to facilitate the linkage of CSM shipping methods to Business Central shipping agents. It is not recommended that you modify these retrieved shipping zone records.*

Note: *A change was introduced in release 2.0 of CSM for BigCommerce that changes the channel order field to which shipping methods are mapped. If you have upgraded your CSM for BigCommerce application to version 2.0 or higher, you must manually change this mapping in that API function GETORDERADDRESS. Locate the existing mapping to table 70338221, field 200 (Ship Service Level) and update this field number to 205 (Channel Shipping Method).*

CSM Payment Methods

CSM needs to map the Payment Methods that BigCommerce allows customers to choose in checkout, to Business Central Payment Methods for each Sales channel you have defined.

This Payment Methods cross reference information can be located on the Related ribbon of the CSM Sales Channel Card.

CSM Payment Methods

Search | + New | Edit List | Delete

API Set Code ↑	Sales Channel Code ↑	Sales Channel Payment Method ↑	Description	Payment Method Code	Automa... Applicat...	Perform Invoice Capture	Perform Capture for Zero Amt
BIGCOMMERCE	BIGCOMMERCEB2C	Purchase Order (On A		ACCOUNT	☐	☑	☐
BIGCOMMERCE	BIGCOMMERCEB2C	Test Payment Provide		AUTHNET	☐	☑	☐

Each Payment Method that a customer can choose from on BigCommerce, should be added and linked to the Business Central Payment Method it corresponds to. We also define here, whether we should send BigCommerce a Capture Transaction (most often a Credit Card Settlement) right after sending Invoice Information. CSM will build the Business Central Sales Order with the Business Central Payment Method linked to the payment method code received from BigCommerce.

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 "shipping provider" records in BigCommerce. BigCommerce uses this record type to represent common carriers such as FedEX, UPS, and USPS. Supported carriers are determined by BigCommerce and not subject to expansion or change; it is not possible for BigCommerce 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 BigCommerce shipping providers. When shipping information is sent between your Business Central and BigCommerce 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 BigCommerce'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 shipping providers that are supported by BigCommerce. If CSM is able to identify a Business Central shipping agent code that is identical to a CSM shipping carrier's expected value, 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 expected value, 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 BigCommerce.*

CSM Tax Groups

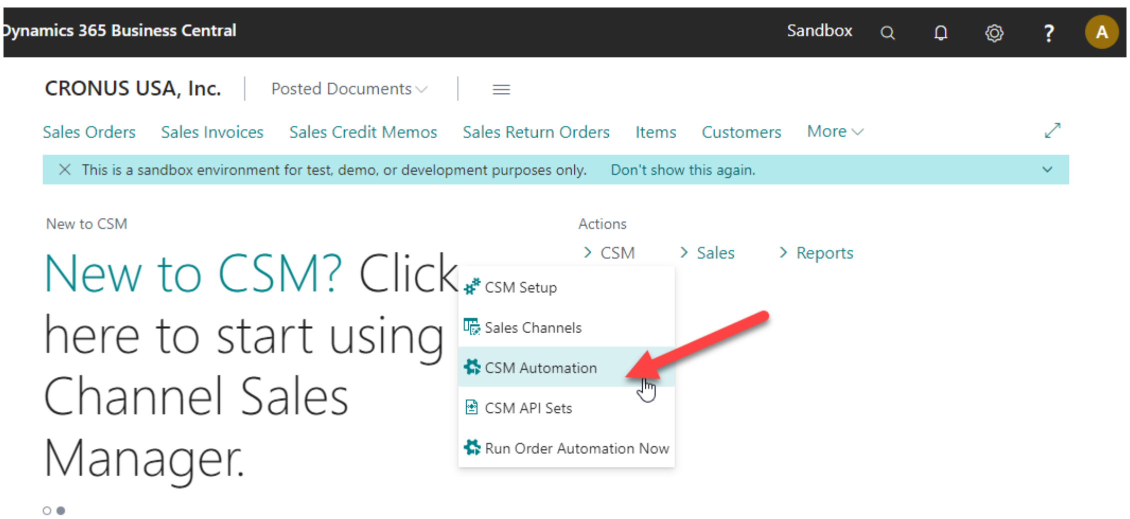
CSM Tax Groups are used by Listing Management and will be described in the Listing Management documentation.

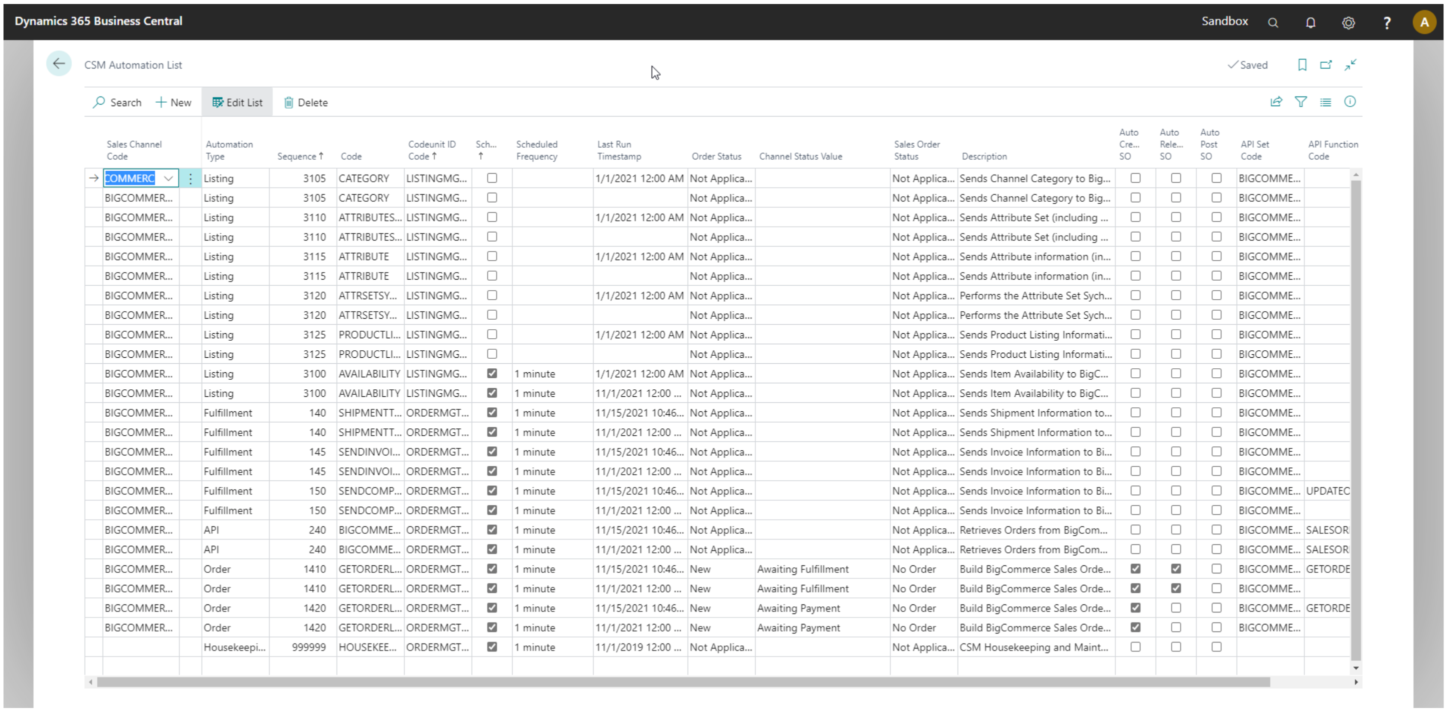
CSM Order Status Matrix

The Order Status Matrix is data that CSM uses to determine a Channel Order Status based on information received from BigCommerce. 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 ↑	Sch... ↑	Scheduled Frequency	Last Run Timestamp	Order Status	Channel Status Value	Sales Order Status	Description	Auto Cre... SO	Auto Rele... SO	Auto Post SO	API Set Code	API Function Code
COMMERC	Listing	3105	CATEGORY	LISTINGMG...	☐		1/1/2021 12:00 AM	Not Applica...		Not Applica...	Sends Channel Category to Big...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3105	CATEGORY	LISTINGMG...	☐			Not Applica...		Not Applica...	Sends Channel Category to Big...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3110	ATTRIBUTES...	LISTINGMG...	☐		1/1/2021 12:00 AM	Not Applica...		Not Applica...	Sends Attribute Set (including ...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3110	ATTRIBUTES...	LISTINGMG...	☐			Not Applica...		Not Applica...	Sends Attribute Set (including ...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3115	ATTRIBUTE	LISTINGMG...	☐		1/1/2021 12:00 AM	Not Applica...		Not Applica...	Sends Attribute information (in...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3115	ATTRIBUTE	LISTINGMG...	☐			Not Applica...		Not Applica...	Sends Attribute information (in...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3120	ATTRSETSY...	LISTINGMG...	☐		1/1/2021 12:00 AM	Not Applica...		Not Applica...	Performs the Attribute Set Sych...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3120	ATTRSETSY...	LISTINGMG...	☐			Not Applica...		Not Applica...	Performs the Attribute Set Sych...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3125	PRODUCTLI...	LISTINGMG...	☐		1/1/2021 12:00 AM	Not Applica...		Not Applica...	Sends Product Listing Informati...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3125	PRODUCTLI...	LISTINGMG...	☐			Not Applica...		Not Applica...	Sends Product Listing Informati...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3100	AVAILABILITY	LISTINGMG...	☑	1 minute	1/1/2021 12:00 AM	Not Applica...		Not Applica...	Sends Item Availability to BigC...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Listing	3100	AVAILABILITY	LISTINGMG...	☑	1 minute	11/1/2021 12:00 ...	Not Applica...		Not Applica...	Sends Item Availability to BigC...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Fulfillment	140	SHIPMENTT...	ORDERMGT...	☑	1 minute	11/15/2021 10:46...	Not Applica...		Not Applica...	Sends Shipment Information to...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Fulfillment	140	SHIPMENTT...	ORDERMGT...	☑	1 minute	11/1/2021 12:00 ...	Not Applica...		Not Applica...	Sends Shipment Information to...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Fulfillment	145	SENDINVOI...	ORDERMGT...	☑	1 minute	11/15/2021 10:46...	Not Applica...		Not Applica...	Sends Invoice Information to Bi...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Fulfillment	145	SENDINVOI...	ORDERMGT...	☑	1 minute	11/1/2021 12:00 ...	Not Applica...		Not Applica...	Sends Invoice Information to Bi...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	Fulfillment	150	SENDCOMP...	ORDERMGT...	☑	1 minute	11/15/2021 10:46...	Not Applica...		Not Applica...	Sends Invoice Information to Bi...	☐	☐	☐	BIGCOMME...	UPDATEC
BIGCOMMER...	Fulfillment	150	SENDCOMP...	ORDERMGT...	☑	1 minute	11/1/2021 12:00 ...	Not Applica...		Not Applica...	Sends Invoice Information to Bi...	☐	☐	☐	BIGCOMME...	
BIGCOMMER...	API	240	BIGCOMME...	ORDERMGT...	☑	1 minute	11/15/2021 10:46...	Not Applica...		Not Applica...	Retrieves Orders from BigCom...	☐	☐	☐	BIGCOMME...	SALESOR
BIGCOMMER...	API	240	BIGCOMME...	ORDERMGT...	☑	1 minute	11/1/2021 12:00 ...	Not Applica...		Not Applica...	Retrieves Orders from BigCom...	☐	☐	☐	BIGCOMME...	SALESOR
BIGCOMMER...	Order	1410	GETORDERL...	ORDERMGT...	☑	1 minute	11/15/2021 10:46...	New	Awaiting Fulfillment	No Order	Build BigCommerce Sales Orde...	☑	☑	☐	BIGCOMME...	GETORDE
BIGCOMMER...	Order	1410	GETORDERL...	ORDERMGT...	☑	1 minute	11/1/2021 12:00 ...	New	Awaiting Fulfillment	No Order	Build BigCommerce Sales Orde...	☑	☑	☐	BIGCOMME...	
BIGCOMMER...	Order	1420	GETORDERL...	ORDERMGT...	☑	1 minute	11/15/2021 10:46...	New	Awaiting Payment	No Order	Build BigCommerce Sales Orde...	☑	☐	☐	BIGCOMME...	GETORDE
BIGCOMMER...	Order	1420	GETORDERL...	ORDERMGT...	☑	1 minute	11/1/2021 12:00 ...	New	Awaiting Payment	No Order	Build BigCommerce Sales Orde...	☑	☐	☐	BIGCOMME...	
	Housekeepi...	999999	HOUSEKEE...	ORDERMGT...	☑	1 minute	11/1/2019 12:00 ...	Not Applica...		Not Applica...	CSM Housekeeping and Maint...	☐	☐	☐		

By default, there are two automation codeunits that you can schedule. These codeunits are identified by the Codeunit ID Code in the Automation List.

- ORDERMGTDEFAULT: performs automation related to CSM order management features. *(codeunit 70338206 "CSM Order Mgt Automation")*
- LISTINGMGTDEFAULT: performs automation related to CSM listing management features. *(codeunit 70338208 "CSM Listing Mgt Automation")*

In this document, we will go through those tasks relating to order management.

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

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, BigCommerce's API Functions to retrieve Channel Orders are set up to receive all orders associated with the API Set, not just orders for a specific sales channel (store / fulfillment method).

API Sales Order List:

This task will automatically retrieve any orders from BigCommerce 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:

Automation Task – Retrieve BigCommerce Orders		
Field	Description	Example Value
Sales Channel	This should be blank for BigCommerce. CSM uses the API Set to download all BigCommerce Orders for all sales channels tied to the API Set.	
Automation Type	Should always be API.	API
Sequence	The Sequence in the Automation run that Order List information is retrieved.	210
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.	BIGCOMMERCEORDERLIST
Codeunit ID Code	The Automation Codeunits use this code to determine whether they run this task.	ORDERMGTDEFAULT
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.	
Sales Order Status	This value is Not Applicable for the API Sales Order List.	
Description	A description of the entry.	Retrieves Count of Orders from BigCommerce then runs the API function to retrieve the Orders
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 BigCommerce API Set to use when executing the Task	BIGCOMMERCE
API Function Code	The API Function Code to Use when executing the Task. This will almost always be SALESORDERLIST for BigCommerce.9 API Sets.	SALESORDERCOUNT
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

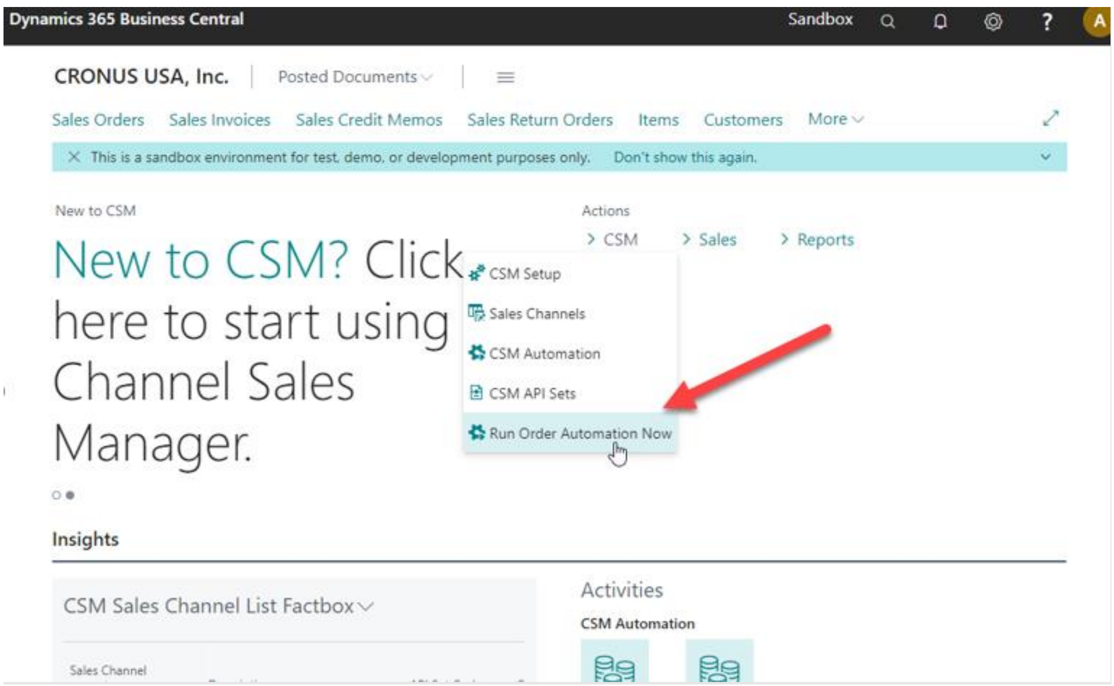
CSM Everyday Operations

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

Running the Automation Manually

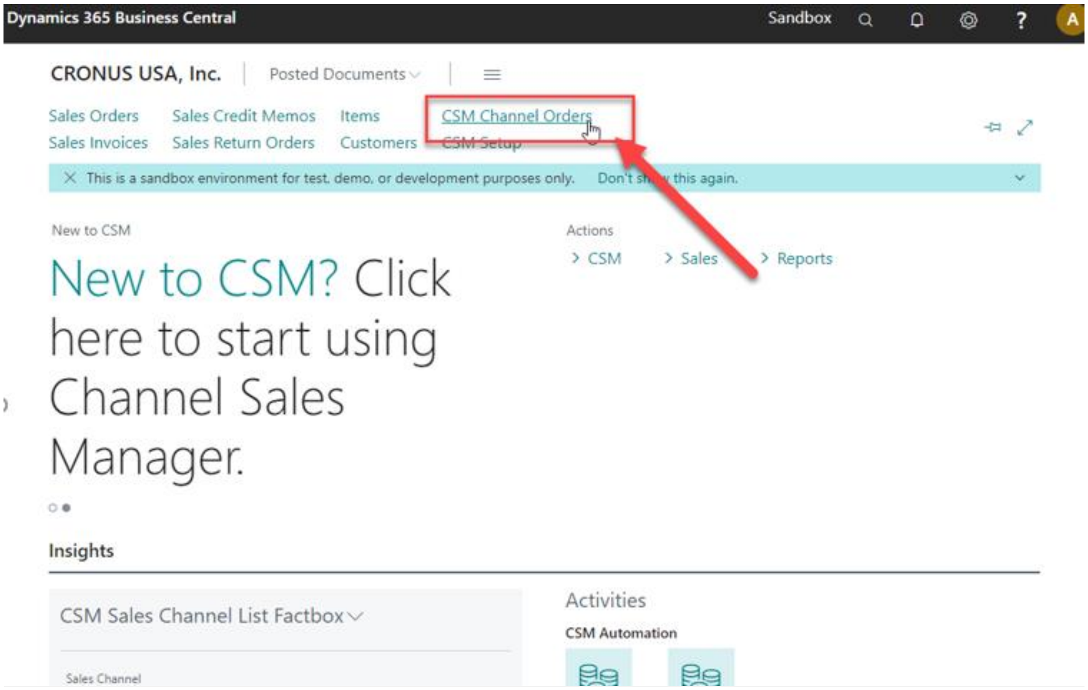
We recommend that you schedule the automation jobs to run on a schedule using Business Central's standard job queue functionality.

If you would like to run the automation manually at any point in time, you can do so from the CSM Role Center Tasks or the Activities section.



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 essentially the data received from BigCommerce regarding an order with some additional information as to the CSM status and links to other Business Central Information.

CRONUS USA, Inc. | Posted Documents

CSM Channel Orders: All | Search | New | Delete | Show Documents | Update Status | Card | Delete Selected Channel Orders | Relate

Order ID	Sales Channel Code	CSM Order Status	Channel Status	Buyer Email	Buyer Name	Purchase Timestamp	Paymen Timesta
129	BIGCOMMER...	Complete	Shipped	sreynolds@suiteengine.com	Steve Reynolds	12/1/2021 1:54 PM	
128	BIGCOMMER...	Error	Partially Shipped	jwang@archerpoint.com	Jessie Wang	11/25/2021 3:06 ...	
127	BIGCOMMER...	Error	Partially Shipped	jwang@archerpoint.com	Jessie Wang	11/25/2021 2:54 ...	
121	BIGCOMMER...	Error	Completed	jessiew@ecadvance.com	Jessie Wang	11/17/2021 9:54 ...	
126	BIGCOMMER...	In Process	Awaiting Fulfillment	jwang@archerpoint.com	Jessie Wang	11/18/2021 10:02...	
125	BIGCOMMER...	In Process	Awaiting Fulfillment	jwang@archerpoint.com	Jessie Wang	11/18/2021 10:02...	
120	BIGCOMMER...	In Process	Completed	jwang@archerpoint.com	Jessie Wang	11/17/2021 9:43 ...	
119	BIGCOMMER...	Error	Awaiting Fulfillment	chenderson@suiteengine.com	Christine Henderson	11/16/2021 2:49 ...	
116	BIGCOMMER...	Error	Completed	chenderson@suiteengine.com	Christine Henderson	11/15/2021 5:27 ...	
118	BIGCOMMER...	Error	Awaiting Fulfillment	jwang@archerpoint.com	Jessie Wang	11/15/2021 10:19...	
117	BIGCOMMER...	Error	Shipped	jwang@archerpoint.com	Jessie Wang	11/15/2021 9:42 ...	
115	BIGCOMMER...	In Process	Completed	jwang@archerpoint.com	Jessie Wang	11/15/2021 2:32 ...	
114	BIGCOMMER...	New	Awaiting Fulfillment	jwang@archerpoint.com	Jessie Wang	11/15/2021 1:48 ...	
113	BIGCOMMER...	New	Awaiting Fulfillment	jwang@archerpoint.com	Jessie Wang	11/15/2021 1:38 ...	
108	BIGCOMMER...	Error	Completed	jwang@archerpoint.com	Jessie Wang	11/11/2021 5:10 ...	

In the list above, we see several orders that are In Process; This means that they are active and have Business Central Sales Orders linked to them.

Also above, you will see orders with an Error status. CSM will assign an Error status to a Channel Order if it could not create a Sales Order because of a Shipping / Payment / Item cross reference that is missing or when the status received from the Channel does not make sense based on the current information in Business Central. Related information to the specific order you select, will be displayed on the information 'I' FactBox on the right side. You will be able to see outstanding amounts, review posted shipments, if there are any credit amounts and also drill down into the associated customer to the order.

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:

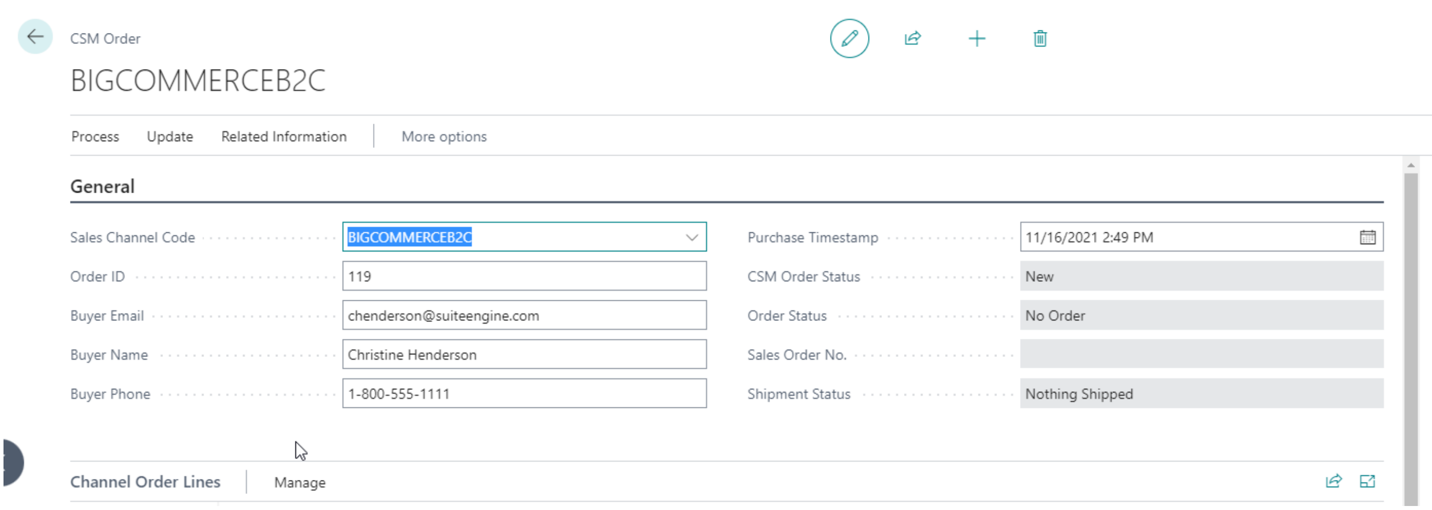
- Have an associated sales order in Business Central and
- Have a CSM Order Status value that is not Complete.

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.

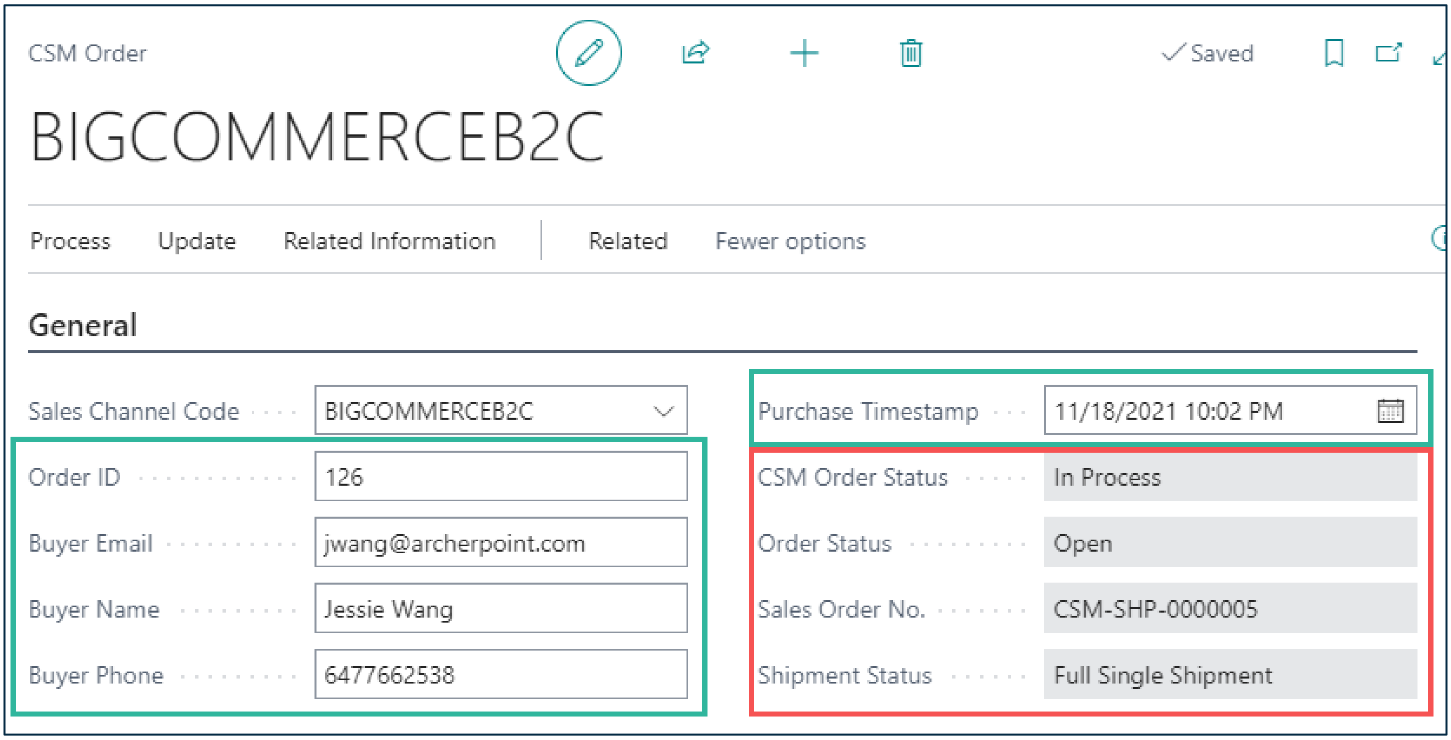
Channel Order Card

Select the Order ID hyperlink to see additional details regarding the CSM Channel Order.



General Fast Tab

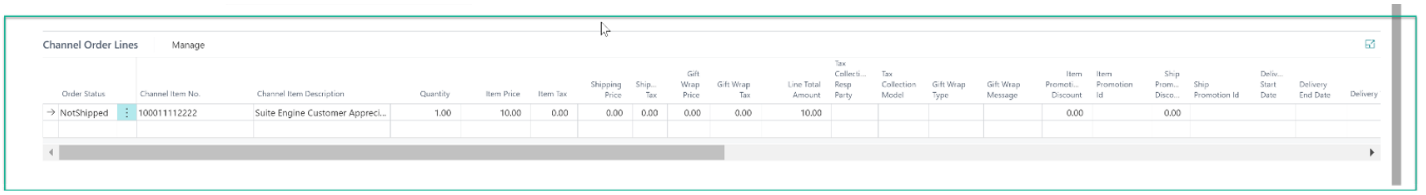
In the General Fast tab of the Channel Order Card, the fields below bordered in green are values from BigCommerce, the fields bordered in red are fields that CSM uses to keep track of status.



- **CSM 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).
- **Order Status** is a status indicating what CSM found in Business Central that are related order documents. Options are:
  - **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.
- **Sales Order No.** If the 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 Next Fast Tab Section on the Channel Order are Channel Order Lines.



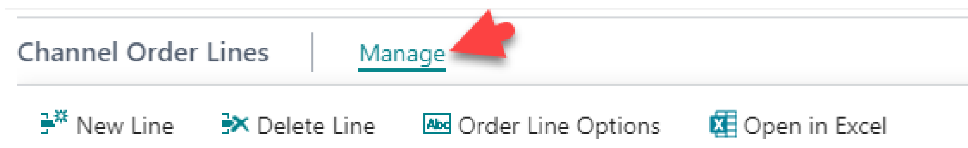
Channel Order Lines | Manage

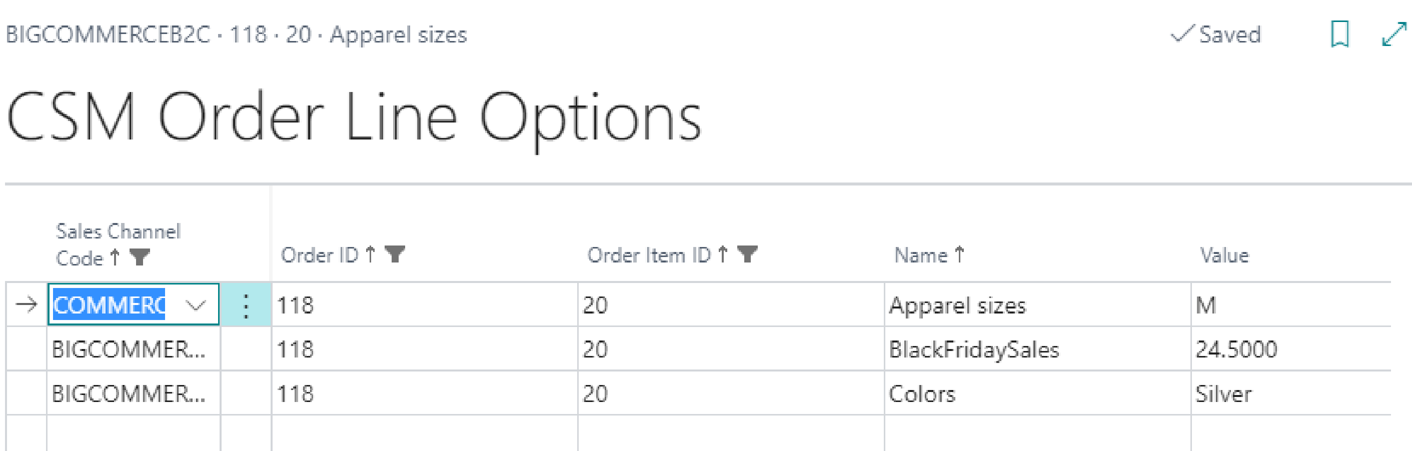
Order Status	Channel Item No.	Channel Item Description	Quantity	Item Price	Item Tax	Shipping Price	Ship... Tax	Gift Wrap Price	Gift Wrap Tax	Line Total Amount	Tax Collecti... Resp Party	Tax Collection Model	Gift Wrap Type	Gift Wrap Message	Item Promoti... Discount	Item Promotion Id	Ship Prom... Disco...	Ship Promotion Id	Deliv... Start Date	Delivery End Date	Delivery
NotShipped	100011112222	Suite Engine Customer Appreci...	1.00	10.00	0.00	0.00	0.00	0.00	0.00	10.00					0.00		0.00				

These are the order lines information as received from BigCommerce. Note that the Channel Item No. and Channel Item Description are what BigCommerce knows the items as.

Order Line Options

For BigCommerce, these will contain detailed sales tax information, applied discounts, product options and other info as supplied by BigCommerce relating to a particular item.





Sales Channel Code	Order ID	Order Item ID	Name	Value
COMMERC	118	20	Apparel sizes	M
BIGCOMMER...	118	20	BlackFridaySales	24.5000
BIGCOMMER...	118	20	Colors	Silver

Order Level Tax on Shipping amounts is also saved in Order Line Options but is not linked to a specific line item. These can be viewed by choosing the Show Order Taxes action in the Update ribbon.

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 as such.

Order Documents FastTab

The Next Fast Tab Section on the Channel Order are Channel Order Documents.

CSM Order Documents | Manage

Order Document Type ↑	Order Document No. ↑	Channel Document No	Channel Creation Date	Channel Payment Method	Amount	Secondary Amount	Channel Document Type	Channel Document Name
Payment	1	1		cod	0.00	0.00		
Note	Customer Note				0.00	0.00		
Coupon	10offcart				14.20	0.57		
Coupon	chtest3				20.00	0.80		

Channel Order Documents show related information to the Order. In the above screenshot, we see the Customer notes, coupons, and payment information that was received from BigCommerce. CSM looks at the Sales Channels Payment Methods to determine the correct value. If the value is not found in the Sales Channel Payment Method table, the Business Central Order Creation will cause an error status to occur on the Channel Order.

As this order is processed, Business Central Posted Shipments and Invoices will be added as they are posted.

Shipping FastTab

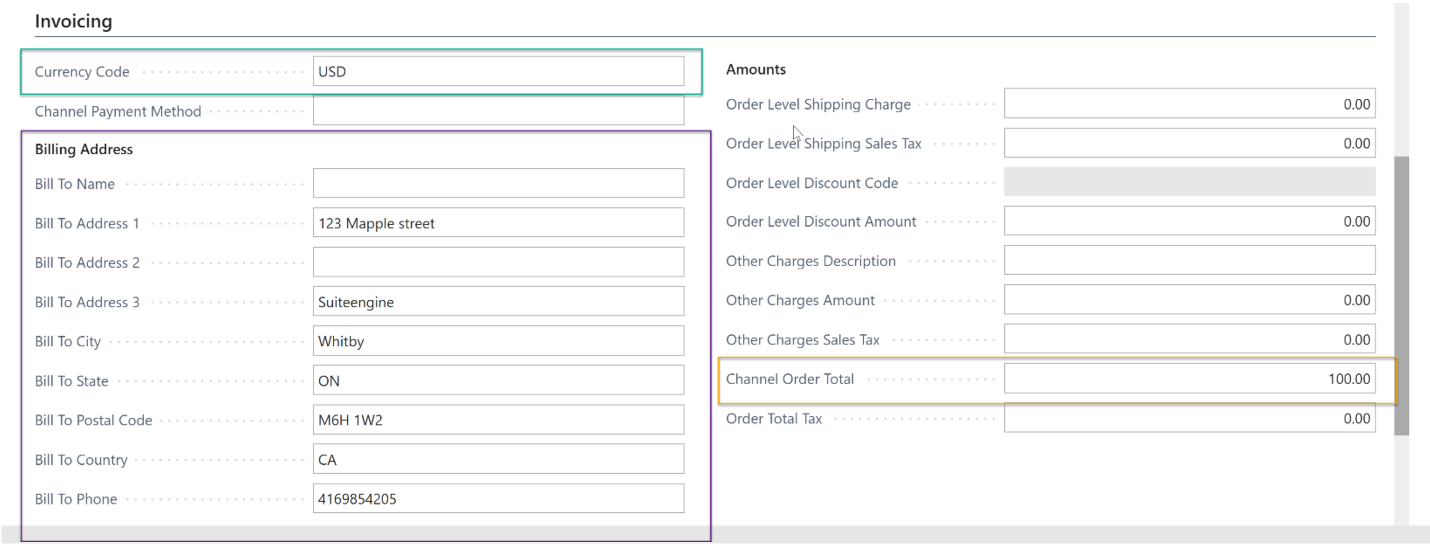
The Next Fast Tab Section on the Channel Order is Shipping Information as it was received from BigCommerce.

The BigCommerce channel order's retrieved shipping quote is entered in the **Channel Shipping Method** field. CSM uses the BigCommerce 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 quote, CSM will not be able to generate a sales order.

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

Invoicing FastTab

The Next Fast Tab Section on the Channel Order is Invoicing Information as it was received from BigCommerce.



The invoicing information received from BigCommerce includes the Order Bill To address information. This is used to build the sales order as well as create a Business Central Customer (if the Sales Channel Setup specifies Auto Create for its new Customer behavior).

Any order level charges received from BigCommerce will be added to the sales order as additional lines.

The Channel Order Total received from BigCommerce is also presented in this fast tab.

Channel Data FastTab

The Channel Data Fast Tab Section on the Channel contains additional information received from BigCommerce.

- Channel Status Value – The status of the Order as received from BigCommerce.
- Channel Customer Code – The BigCommerce ID of the customer who placed the order. CSM uses this value to determine whether the customer already exists in Business Central or needs to be created (See the discussion regarding Sales Channel Customers).
- Guest Customer – Indicates whether the Customer used Guest Checkout on BigCommerce when placing this order. Note that CSM uses this value to determine the appropriate Customer behavior. Also, CSM can determine that a Customer (who used the same email address on a previous order) previously was setup as a guest customer, and now has registered an account on the BigCommerce store.
- Cart ID – The unique ID assigned by BigCommerce to the order's shopping cart.
- Channel Sales Identifier – This is the BigCommerce Store ID. CSM uses this to determine which CSM Sales Channel the order belongs to. It should match an API Channel Identifier on a CSM Sales Channel.
- Order Channel – A text version of the Website and Store that the BigCommerce Order occurred in.
- Marketplace ID – Not used by BigCommerce.
- Order Source – Indicates the method by which the order was placed by BigCommerce.

Refund Information FastTab

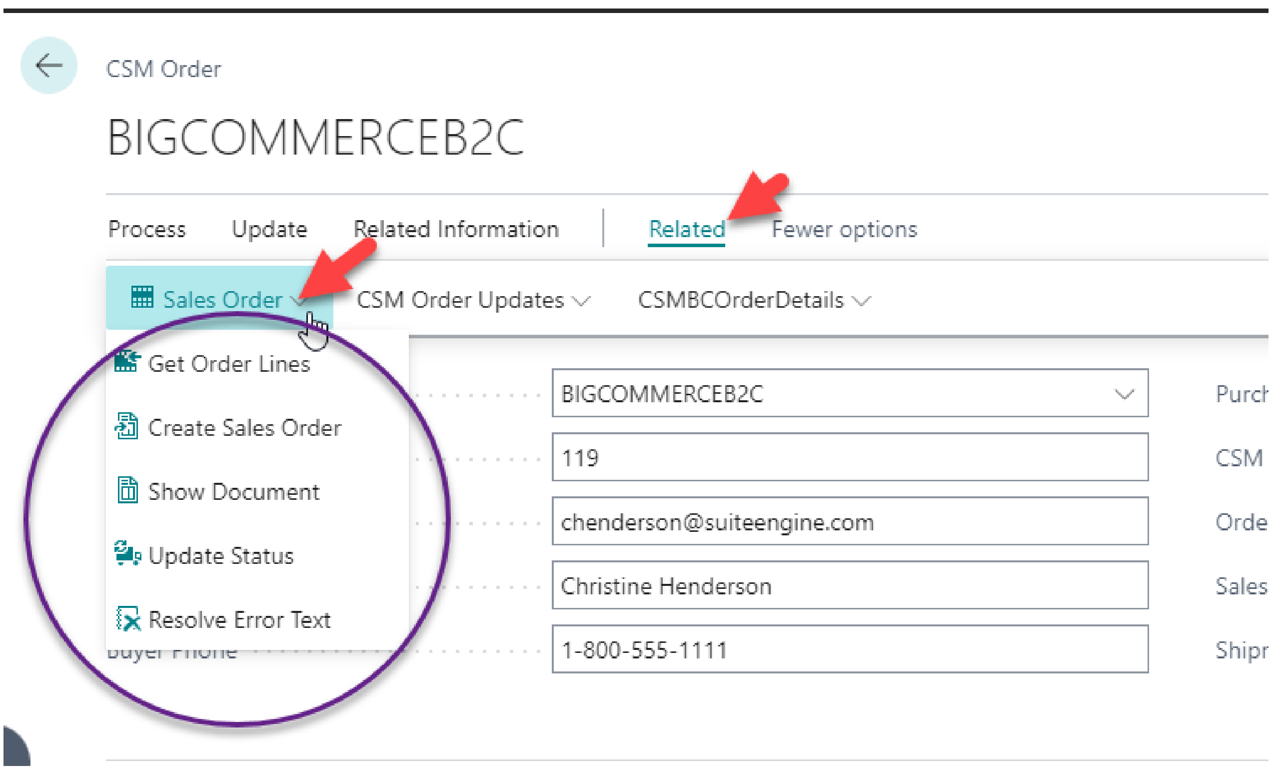
The functionality on this FastTab is not currently supported by CSM for BigCommerce.

Information FastTab

This fast tab 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 BigCommerce to retrieve the order lines from the external platform.

- Create Sales Order – This action will attempt to use the data retrieved from BigCommerce 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 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.

Update Actions

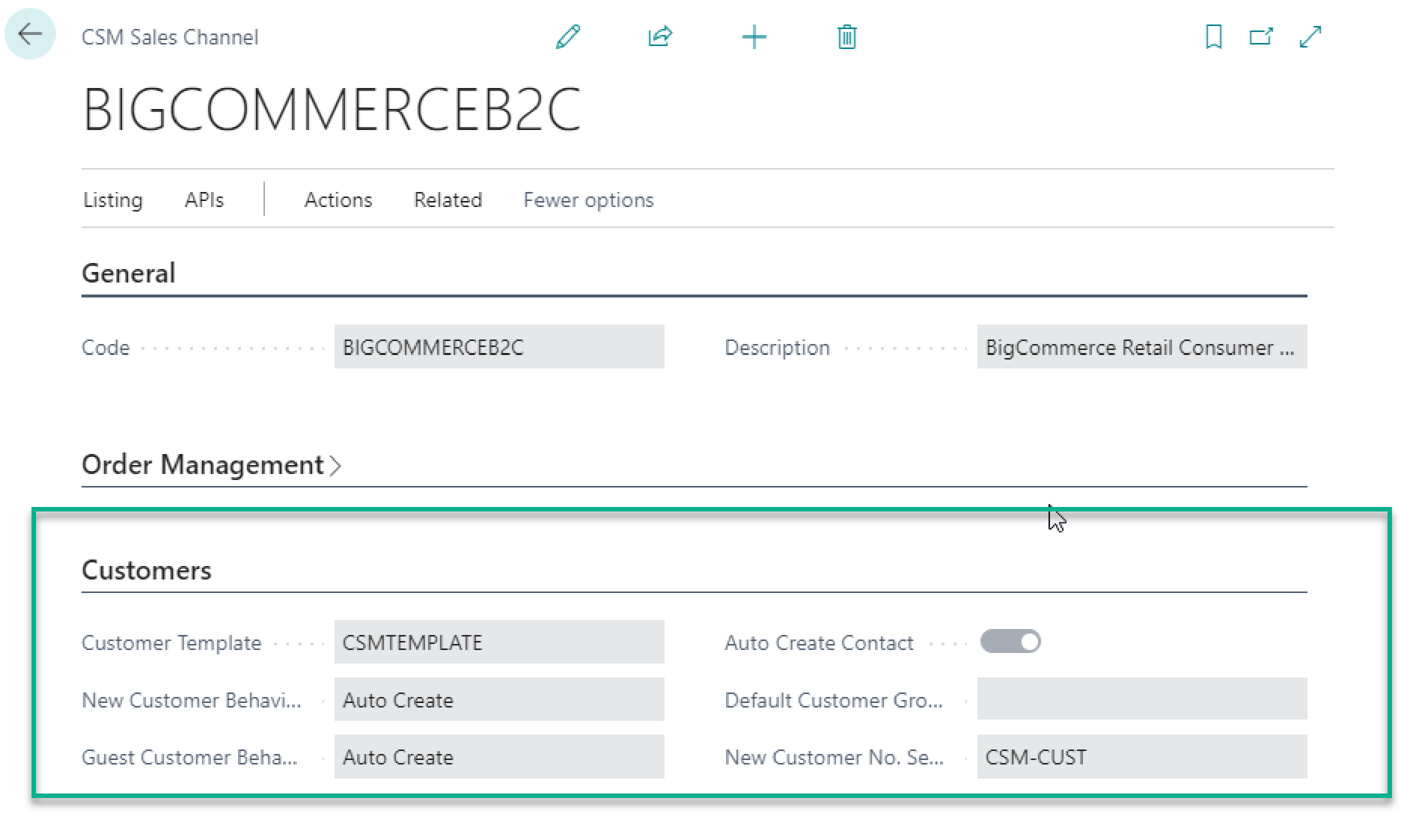
In addition to the channel order actions described above, there are a number of dedicated update activities that can be performed against a channel order. Because BigCommerce supports separate API calls for the various types of order information, it is possible to request an update to just one of these information types. This is useful in scenarios where there is an issue or problem with one of these particular aspects of an order, as it allows you to address that one aspect as opposed to having to update the entire order.

To view these update actions, choose the Related ribbon, then choose the CSM Order Updates menu. Options include:

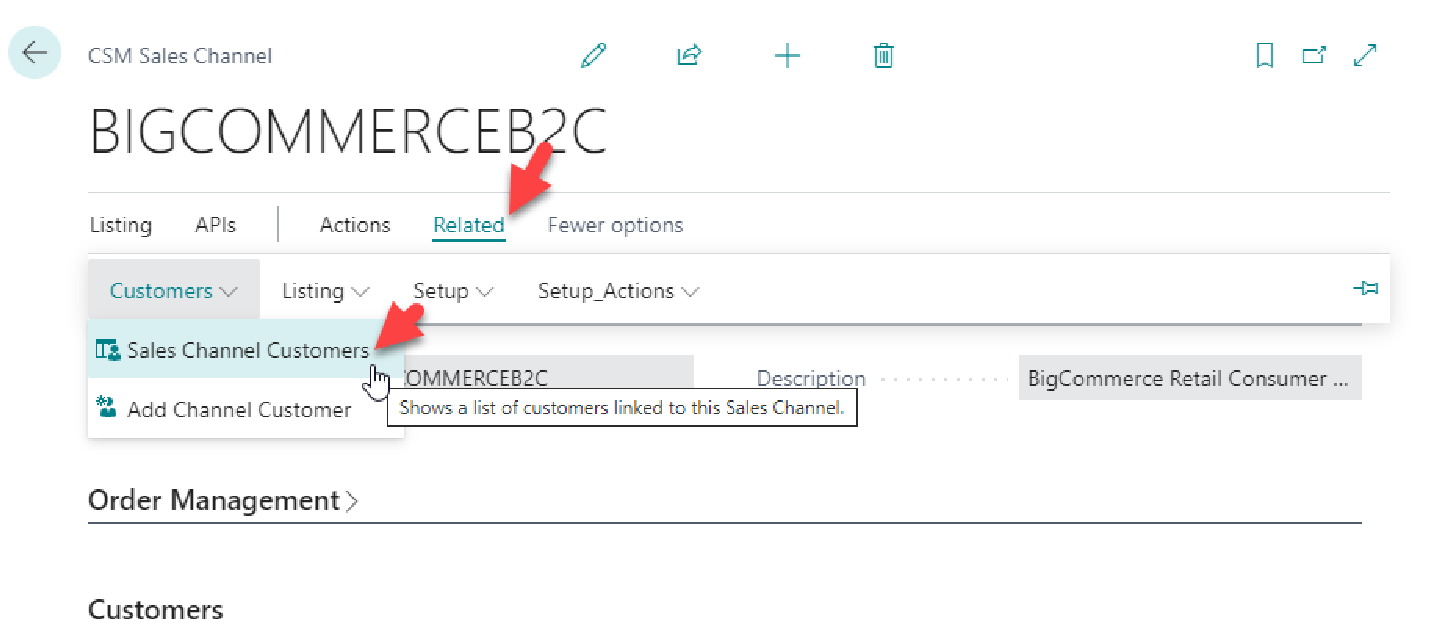
- **Get Order Address:** this will instruct CSM to retrieve the order's address from BigCommerce and assign it to the CSM order.
- **Get Order Tax:** this will instruct CSM to retrieve the order's calculated tax values from BigCommerce and assign them to the CSM order. Order taxes can be calculated on the ordered items themselves, as well as other components such as shipping. Total tax amounts are displayed on each channel order line; for a detailed breakdown of these totals, choose the Manage ribbon and then choose the Order Line Options action.
- **Get Order Messages:** this will instruct CSM to retrieve any entered order messages from BigCommerce and assign them on the CSM Order Documents FastTab. Order messages comprise special instructions that were entered by the customer at the time of order entry, as well as communications between the customer and vendor.
- **Get Order Coupons:** this will instruct CSM to retrieve any coupons that have been applied to the order in BigCommerce and assign them to the CSM order. The total discount amounts of applied coupons are displayed on each channel order line; for a detailed breakdown of these totals, choose the Manage ribbon and then choose the Order Line Options action.
- **Set Status to Completed:** this will instruct CSM to set the order's status to Complete. This is useful in scenarios where an order may have been completed on the BigCommerce platform but was not properly updated in Business Central. In such an instance, this update action can be used to manually set the order's status accordingly.

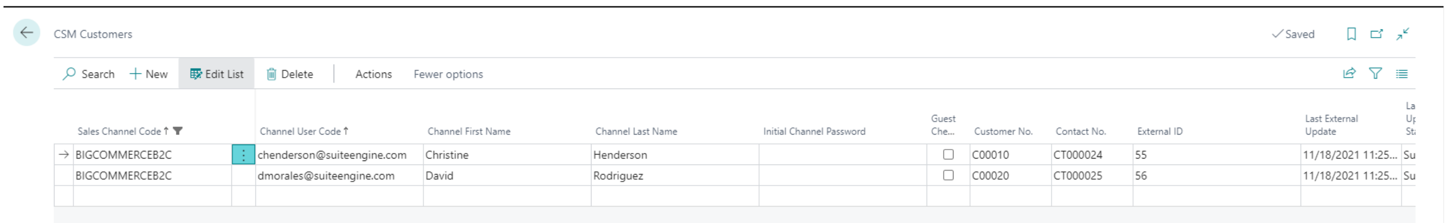
Sales Channel Customers

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


CSM Sales Channel
BIGCOMMERCEB2C
Listing
APIs
Actions
Related
Fewer options
General
Code
BIGCOMMERCEB2C
Description
BigCommerce Retail Consumer ...
Order Management
Customers
Customer Template
CSMTEMPLATE
Auto Create Contact
New Customer Behavi...
Auto Create
Default Customer Gro...
Guest Customer Beha...
Auto Create
New Customer No. Se...
CSM-CUST

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.





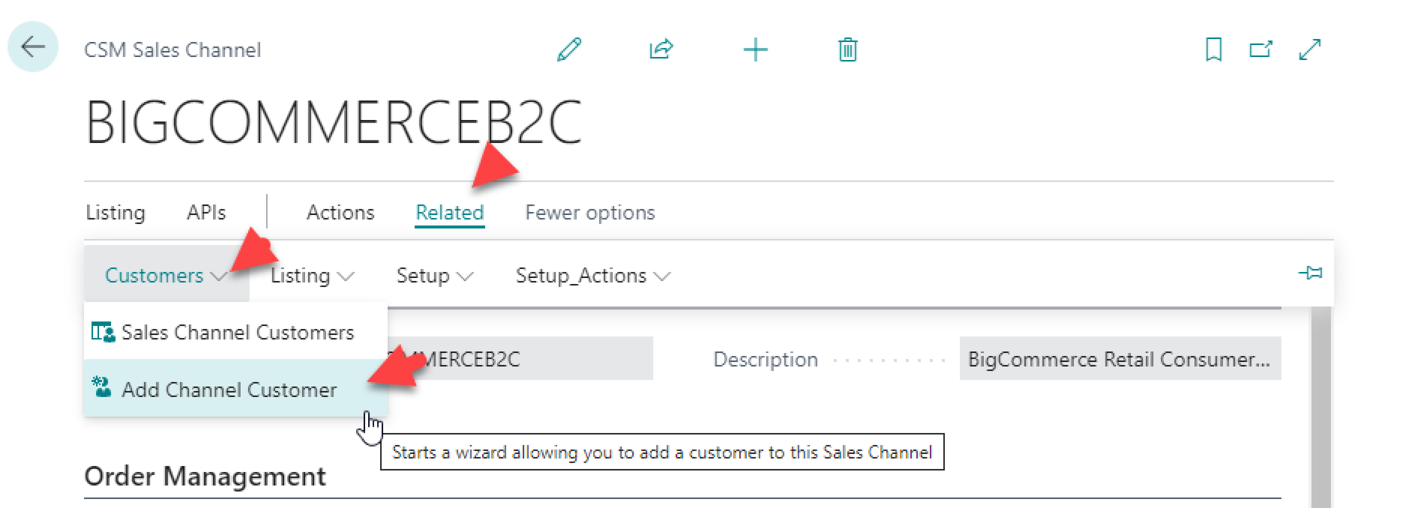
If the Channel Order indicates that this is a Guest Checkout, CSM will look at the Sales Channel Customers to find an email (Channel User Code) Match. If found, it will attach the Order to the Customer and Contact specified on the found entry. If a match is not found, CSM will follow the Customer Behavior specified on the Sales Channel. If it is set to Auto Create, a new Business Central Customer will be Created using the number series specified on the Sales Channel.

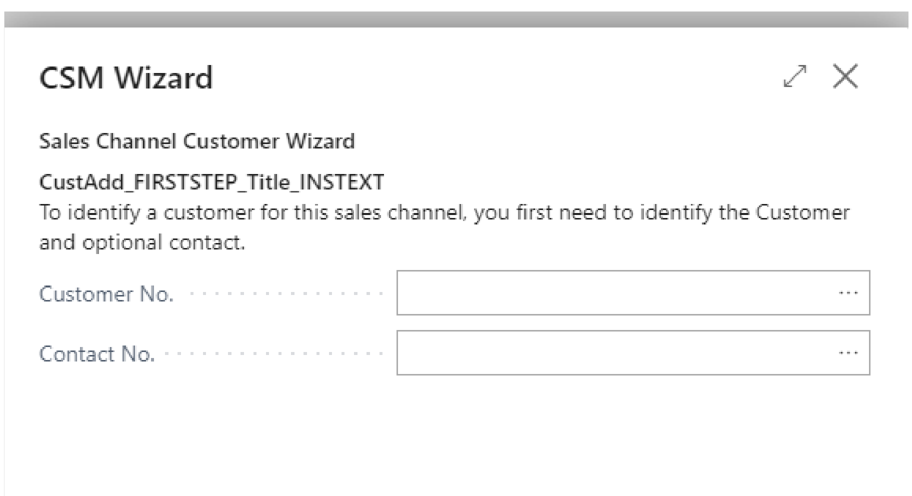
For those orders where the Guest Checkout is false, CSM first looks at the External ID to see if there is a match. It then looks at the email for Guest Checkouts, and if found, essentially updates the record with the ID and uses that as the Customer for Sales Order Building Purposes.

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. This may be useful in an B2B situation where new accounts who register on BigCommerce need to be approved in Business Central before being setup as a customer. In this case, you would manually setup the CSM Sales Channel Customer record and link it to the appropriate Business Central customer (and optional contact). You would also need to set the Sales Channel Customer External ID to match the ID that BigCommerce sent for the order.

You can also send information to BigCommerce from Business Central Sales Channel Customers. To do this you would add a Sales Channel Customer record using the 'Add Channel Customer' Wizard and choose the appropriate Business Central Customer and Contact.





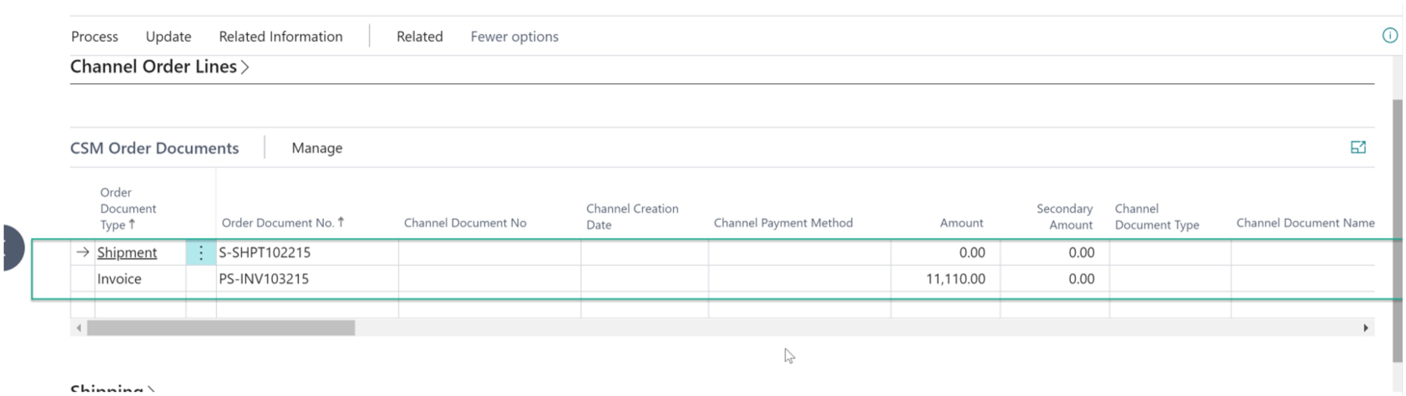
Make sure you enter the email address in the Channel User Code and a starting password. (Note, Channel User Code must be unique for the Sales Channel.) Then use the **Send To Channel** – Channel Integration Action. This will send the full name and address information from Customer or Contact to BigCommerce. It will look for the Contact first, if it does not find a contact, it will look for the customer record.

Sending Shipment Information

Sending Shipment Information in CSM, is, for the most part, transparent. This section will review the process.

When you post a shipment for a Business Central Sales Order that relates to a CSM Channel Order, CSM intercepts that event and sends the shipment information. It will pull the tracking number from the Sales Order Package Tracking No. field.

First, CSM will create a new CSM Order Document for the event, which essentially assembles all the information needed to send to BigCommerce.



Next, CSM will send the information to BigCommerce, where a corresponding order shipment record is created. This order shipment has its own unique external ID, which is sent back to Business Central, and is assigned to the transaction on the CSM Order Document Line. As shipments are posted, CSM orders are then assigned a "Shipment Status" of either "Full Single Shipment" or "Full Multiple Shipments." As a separate and final activity, CSM sends an order status of Complete to the relevant order in BigCommerce.

If for some reason the communication fails upon posting, the CSM automation will look for Shipment Documents that do not have an External ID and attempt to resend them.

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 sales 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 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

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 records by choosing an order line in the Channel Order Archive Lines FastTab, choosing the Manage action, and then choosing the Order Line Archive Options action.

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.

CSM Additional Details

CSM API Data

If you used the Quick setup wizard, the BigCommerce API data should have already been loaded, however, if you wish to create another API set, and load it, you can do so here.

On the Role Center Action Ribbon, press the CSM API Sets button in the Tasks Section. This will display the CSM API Sets Page. Press the New button in the action ribbon and enter a new API Set.

API Set fields, what are they and what do they mean?

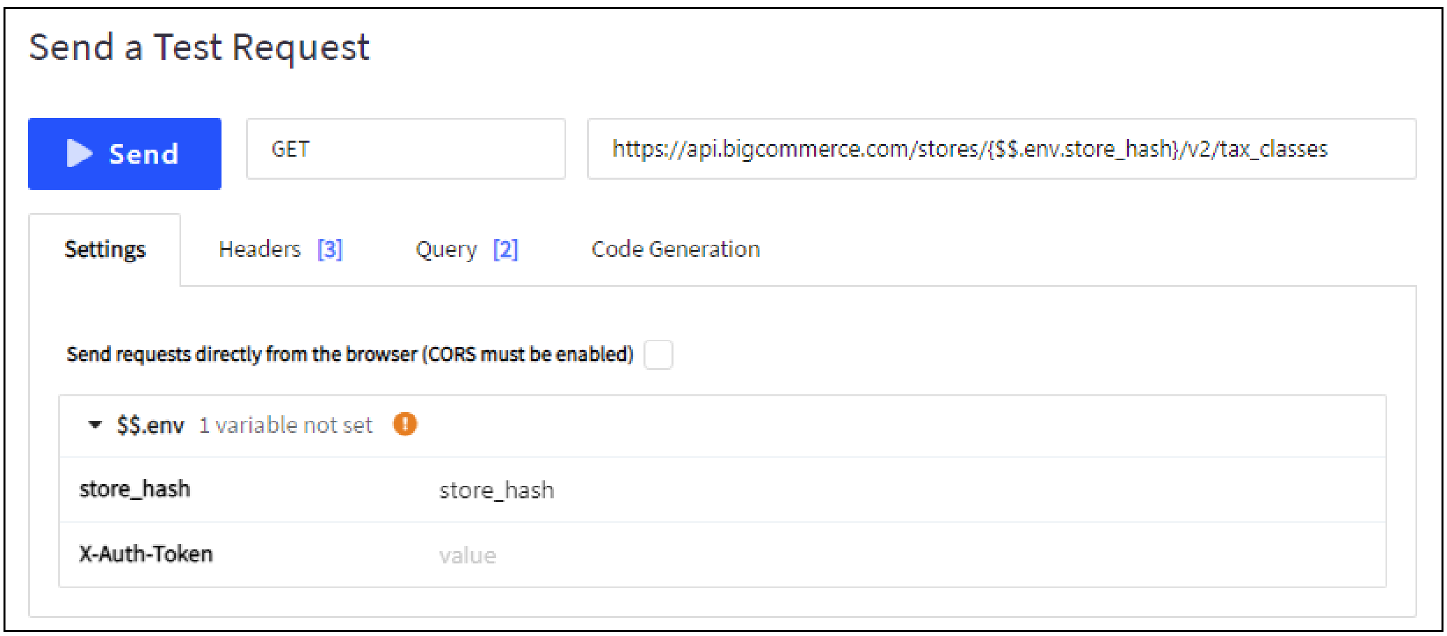
Field	Description	Example Value
Code	This is unique code that identifies the API set. It can be any value you wish, but we recommend naming it something meaningful that describes the external source the API set communicates with.	BIGCOMMERCE
Description	This is a text description of the API set. It can 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, Amazon, etc.).	BigCommerce API Data
API Set Behavior	This tells us which channel we are dealing with, choose BIGCOMMERCE.	BIGCOMMERCE
Session API Function Code	This indicates the API Function used to maintain session management with the Channel. Always select LOGIN.	LOGIN
Session Timeout	This is a duration value that determines when a session should be refreshed. For example, suppose we enter a duration of 5 minutes. This means that when communication is attempted with the channel, if the session is more than 5 minutes old, CSM will start a new session with the channel (BIGCOMMERCE).	5 minutes
HTTP Web Request Timeout	The amount of time, in seconds, that CSM will wait for a response to a request made to the channel. If your BIGCOMMERCE server is under configured, it may be slow to respond, in our example, we set the value to 600000; Suite Engine recommends entering a value of 60,000 or above.	600,000
Host	This is the host URL endpoint for soap services on your BIGCOMMERCE server.	api.bigcommerce.com/stores
User ID	This is the BIGCOMMERCE user that CSM should authenticate its API Calls with. This user should be assigned a BIGCOMMERCE user role that gives it access to all API's.	Blank
API Key	This is the BIGCOMMERCE API Key which CSM authenticates API Calls with.	Blank

Working with the BigCommerce API Reference Tool

Whenever a new record is created within BigCommerce, a unique identification number is assigned to that record. For the purposes of the end user, these numbers are not as informative as the record's name or title, but they are necessary to identify each record as unique within the system.

As part of configuring your CSM for BigCommerce solution, it is necessary to establish links between corresponding Business Central and BigCommerce records. In order to complete this setup, it is necessary to supply the BigCommerce record's unique ID; it is this value that is associated to a Business Central record.

As stated above, a BigCommerce record's ID is generally not of value to the end user. As such, record IDs are not readily visible or accessible from within BigCommerce. In some instances, it is possible to obtain this information by opening the record in BigCommerce and deriving the ID from the URL. In other scenarios, however, this is not an option. CSM typically recommends the use of a tool such as Postman that can retrieve this information from an eCommerce platform. However, in the case of BigCommerce, an out-of-the-box API reference tool is also available. This tool can be accessed at https://developer.bigcommerce.com/api-reference. The various types of BigCommerce record you can obtain are presented on the left-hand side of this page. Selecting a record type will present a list of available options. From here, you can choose the type of request you want to send. Each selection includes a **Send a Test Request** area in which you can define necessary parameters and then obtain information from BigCommerce according to those parameters. The first time you perform this activity, it is necessary for you to associate the API reference tool to your BigCommerce store by populating the **store_hash** and **X-Auth-Token** settings with your relevant credentials:



It is only necessary to enter these credentials one time; they will be stored within the API reference tool for all future requests.

After you have assigned the necessary credentials, you must define any other required parameters. The specific parameters you must provide will differ from record type to record type. You can then choose the **Send** button to instruct the API reference tool to present a list of values from your BigCommerce platform according to the established parameters.