



CSM FOR WOOCOMMERCE

An App by Suite Engine

Microsoft Dynamics 365 Business Central

Listing Management Setup

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LISTING MANAGEMENT SETUP

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

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This document presents Listing Management setup information regarding CSM for WooCommerce Listing Management functionality for Microsoft Dynamics 365 Business Central. CSM for WooCommerce Listing Management functionality is additional functionality available for subscription purchase with the CSM for WooCommerce Order Management module.

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CSM Setup

CSM for WooCommerce Listing Management requires that you have already setup the CSM for WooCommerce Order Management functionality. Please follow the setup instructions for CSM for WooCommerce Order Management.

CSM Sales Channel

There is a 'Listing Management' Fast tab on the Sales Channel Card. These fields are mostly defaults that CSM uses to build a Channel Listing from Business Central Item Data using the Create Listing Wizard.

Listing Management Fast Tab		
Field	Description	Example Value
Prod Information Purpose	This field is for future use, it will allow you to specify a purpose for product information you populate in CSM	
Auto Build Attributes From	Indicates the method used to auto build attributes for a Sales Channel attribute set	Item Attributes
Enable New Attribute Design	Enabling this field will instruct CSM to store listing attribute information in separate tables. The full functionality of this table structure has not been added to CSM and this field should be turned off. Enabling this field at this time will break existing attribute functionality .	No/False
Price Group Code	Price Group to use in Listing Management for pricing.	ECOMB2C
Listing Default Long Description / Listing Default Short Description	<p>CSM can populate the Long Description sent to WooCommerce based on a Long Description CSM Product Information record attached to the CSM Listing. This Product Information record can be something you create, or linked to Business Central data:</p> <p>Manual: CSM will not link the Long Description to any value, however the user can create a long description product information record (with HTML tags supported) as a CSM Product Information entry for the listing.</p> <p>Extended Texts: CSM will link the Long Description Product Information record to the Extended Text entry for the item being listed.</p> <p>Description 2: CSM will link the Long Description Product Information record to Description 2 of the Item being listed.</p> <p>LS Item HTML: If the LS Central extension from LS Retail is installed, CSM can link the LS Central Item HTML value to the Long Description product information record for the listing.</p>	Manual
Default Images	CSM can send links/URLs to WooCommerce. WooCommerce does not receive images.	Item Picture
API Image File Path	This field is used by CSM for WooCommerce, other channels that CSM can communicate with, may use this information. A path to send to the channel when communicating product image filenames. The current WooCommerce release 1.0 only sends the Base Image URL.	
Base Image External ID		
Small Image External ID		
Thumbnail Image External ID		
Listing Management Fast Tab (Availability Defaults)		

Field	Description	Example Value
Send Availability Information	This field indicates whether CSM should send inventory availability to WooCommerce for this Sales Channel.	Switched On (True)
Default Availability Basis	The Business Central Inventory method to use when calculating availability. This is a default that every CSM Listing for this Sales Channel will be created with. You can however override this value for each individual Listing. All of the below methods use the location specified on the Sales Channel for the calculation. <ul style="list-style-type: none"> Availability – (Item Availability) On hand, less what is due to ship on a sales order + what can be received on a Purchase Order where the expected release date is today or less. Available Inventory – On hand minus what is on reserve for other demand Inventory – On hand inventory for the Location specified by this Sales Channel. 	Availability
Default Availability Percent	Allows you to specify a percentage to reduce the above calculated availability basis by before sending the value to WooCommerce. For Example, if the Availability Basis calculation was 100, and the Availability percent was 80%, then a value of 80 would be sent to WooCommerce. This value will be used when creating the listing and can be changed for each listing.	100
Default Availability Threshold	A minimum inventory threshold that must exist before CSM will send a calculated value. If the actual Inventory basis calculation was 9 and the threshold was set to 10, the CSM would send 0 to WooCommerce for the availability of this listing. If the calculation was 11, then CSM would send 11 to WooCommerce (except if the Subtract Threshold From Avail switch is On). A threshold value of 0 indicates that threshold adjustments should not be considered.	0
Subtract Threshold from Avail	A switch that indicates whether the threshold value should be subtracted from the calculated inventory availability before sending to WooCommerce. For Example, If the Availability Basis yielded 100, and the Availability Percent was 80, and the Threshold value was 10, CSM would send a value of 70 to WooCommerce for the Listing.	Switched Off (false)

CSM Tax Groups

WooCommerce has Tax Classes that do not have IDs assigned to them. As of the writing of this document, there is not an existing way to link a CSM Tax Group to a WooCommerce Tax Class.

Default values in WooCommerce are Standard Rate, Reduced Rate, and Zero Rate.

CSM Channel Categories

CSM allows you to define and map Business Central Item Categories to WooCommerce Categories. CSM can analyze your Business Central Category structure, build the CSM data necessary, and then create your category structure on WooCommerce. Conversely, if your WooCommerce category structure already exists, you can manually link those WooCommerce Categories to the CSM category data. In this section, we will walk through an example.

- A CSM Channel Category can relate to a Business Central Category. While not required, this relationship is beneficial since it will be used for default information when building a Channel Listing.
- The Sales Channel Category ties to the WooCommerce Category via the External ID field.
- Parent Categories can also be defined. You can define the entire hierarchy of the WooCommerce Categories in CSM. The WooCommerce Root category should be the only CSM Sales Channel Category that does not have a parent.
- CSM functions will create the Category on WooCommerce or update it if CSM is already linked to the WooCommerce Category.

- If the WooCommerce Category already exists, you can link it to CSM by entering its ID manually on the CSM Sales Channel Category.
- Once categories are mapped, when you list a Business Central Item on WooCommerce, CSM can automatically place it in the primary category it should be part of on the WooCommerce side.

On the Business Central application, you can add Item Categories using the standard Business Central functionality.

Using the Listing Wizard to create Categories: On your Sales Channel, go to 'create category wizard.' The Wizard will lead you through the process of creating categories as well. For the Method on the First Wizard screen, change the value to BC Category. This will tell CSM that you want to build CSM Channel Categories from Business Central Item Categories. Press Next to go to the next step.

The 2nd page of the wizard gives you some choices as to how and what will be built. To have CSM build a structure, we need to tell it where to start, and that we want it to include the Children of that Category rather than just building a single.

The 3rd and last page of the wizard, just tells us that we are ready to go. Press the finish button to have CSM bring in the new structure.

Once it is complete, you should now see new categories in the category list. It is important to remember, that you can change the information before it is sent to WooCommerce. CSM names the category based on the name assigned to the BC item category; This can be changed later. Remember, these categories will be customer facing, so please name them accordingly.

When you're ready to send the information: It is recommended to send the parent category first before sending its children so that WooCommerce links them in the correct order.

Select a line and from 'Actions,' click 'Send To Channel.'

After the categories are changed, CSM updates the external IDs of the lines.

You can also **send information to the Channel for multiple Channel Categories** by checking the 'External Requires Update' checkbox for each Category you would like to send. This will send the information regardless of whether it is new to WooCommerce or if it is being updated.

CSM Attribute Sets

On WooCommerce, Attribute Sets do not exist, but it is helpful to set up the Attribute Sets in CSM as it helps with internal creation of the Attributes and their Values (Options).

WooCommerce has Attributes and Attribute Terms (the values/options).

For example, let's say:

- Brand – The brand of the product
- Material – the primary material the product is constructed of.
- Has Logo – Whether the product bears our logo.

However, another product that we want to list, will have the following attributes:

- Brand – The brand of the product
- Material – the primary material the product is constructed of.
- Has Logo – Whether the product bears our logo.
- Service Type – The Type of Service the Product represents (Service Piece, Place Setting component)
- Capacity – The fluid capacity of the Product
- Diameter – The Diameter in inches of the Product

In Business Central we can define Item Attributes with Item Categories. Item Attributes are assigned to a Category, and a product assigned to that category will have attributes from that category, plus inherited attributes from parent categories.

In CSM you can always manually create an Attribute Set. There are several ways to create an Attribute Set in CSM.

1. On the Category Create Wizard, check the box to automatically build a CSM Attribute Set for each Item Category processed.
2. Or, we could have also created the Attribute Set from a single Channel Category, by clicking on Edit List > Data Sync > Build Attribute Set
3. Or, we could have manually entered the Attribute Set directly on the Sales Channel Attribute Sets page.

Notice that each attribute set is tied to a BC Item Category. CSM Attribute sets will never have an External ID for WooCommerce.

CSM Attributes

In WooCommerce, Attributes are essentially extra information that can be assigned to products. As mentioned in the previous section regarding Attribute Sets, an Attribute Set is a collection of Attributes that are assigned to a product. CSM needs to know about the WooCommerce Attributes as well and how they relate to BC Item Attributes. It is not necessary to link a CSM Attribute to a BC Item Attribute, but they are very powerful if they are.

As with many other CSM components, Attributes can be created. You can create an attribute from CSM into WooCommerce from CSM Attributes or you can manually link a CSM Attribute to a WooCommerce Attribute simply by typing in its' WooCommerce ID.

- You can Manually Create the Attribute on the CSM Attribute list page from the Sales Channel.

In Woo Commerce admin, it is possible to find the ID of the Attribute Terms. In the Sales Channel Card, go to Related > Listing > Channel Attributes function on the CSM Sales Channel Card.

On Attributes, Configure Terms for one of the Attributes. Choose one of the existing Terms. The browser URL will include the ID of the Attribute Term. The purpose of having this ID from WooCommerce is that it links to an existing WooCommerce Attribute and you will need to find the WooCommerce data for the External ID.

e.g.: https://csmwoo.com/wp-admin/edit.php?post_type=product&page=product_attributes&edit=9

In regard to the options values: If your attribute has them, then you must also link the possible option values to the Attribute Terms. To access those, go to the CSM Attributes page > Edit list > Data sync > Show option values.

To send Attributes and Attribute Options to WooCommerce: Go to the Attributes list page and use the 'Channel Integration' actions > Send to Channel / Send All to Channel / Send Requires Update to Channel. This is for the Attributes.

You can also use the 'Send Options For Attr To Channel' to send all options for a selected Attribute.

Product Listings

Now that basic CSM For WooCommerce setup is complete, we can concentrate on creating CSM Listings which can then be sent to WooCommerce for inclusion in its Products page.

Relevant Dynamics 365 Business Central Item Information

Let's start by looking at a D365 BC Item and related information and showing the relevant data that CSM can send to WooCommerce.

In D365 BC on the item you have already defined/created, let's pay attention to the values that CSM will look for. Note that all the information is not required for CSM to transmit product information to WooCommerce. CSM will send what it finds, and it can always be updated later.

- Item No.
- Type
- SKU
- Regular price
- Virtual
- Downloadable
- Weight
- Primary category code
- Catalogue visibility
- Item Category
- Item Picture
- Extended Text (on the **field 'Description,' type 'Short description'**)
- Set Special Prices (standard functionality for sales prices)
- Identifiers (CSM can use this to link a WooCommerce Product SKU that is different than the Item Number)

About 'Item Picture'

The image needs to be added in the WooCommerce store admin first. Those are in Media > Library. CSM only sends a URL link to WooCommerce, not the actual image itself.

In BC, the image is on the CSM Listing card, in the Listing Product Information section, on a line with "Information Type" = Image. The URL that CSM sends is built from the "API Image File Path" on the Listing Management tab of the Sales Channel Card plus the "CSM Name" field on the Listing Product Information line.

Use the action Channel Integration > Send Images to Channel. WooCommerce should return an External ID and fill some other fields with "External" in the name. On WooCommerce, the image should be assigned to the product.

CSM Listing

Now that we have reviewed the Item Information in D365 BC, we are ready to define the product listing in CSM for our WooCommerce Sales Channel.

To create a new listing on WooCommerce, we can use the Create Listing Wizard from the Sales Channel Card.

Go to the WooCommerce Sales Channel > click Listing > click Create Listing Wizard

The CSM Listing Wizard is then displayed.

- Enter the D365 BC Item No. that you would like to list on WooCommerce.
- If Variants existed for this item, you could choose the Variant.
- If more than one Unit of Measure exists for the item, you would be able to select an alternate for this listing. It is possible to have multiple SKUs listed on WooCommerce with varying Units of Measure and Variants.
- Press Next to continue the Listing Wizard.
- Populate the SKU (or Identifier) that the Channel (WooCommerce) should know this listing as. Note that the value will default to an entry in the Item Identifier table, however you can override this value by typing in a new SKU. The SKU does, however, need to be a unique value for this Sales Channel.
- When finished, press Next.
- Press Finish.

We can now review and fine tune the listing information that CSM just created.

To view the listing:

Go to the Sales Channel Card > Listing > Channel Listing

OR

Search for 'Channel Listings'

This will show a list of all the listings we have defined for our WooCommerce Sales Channel.

Select the item just added to open it and view the details.

Now, let's review the sections of the listing that CSM assembled from the D365 BC Item Data.

The first two Fast Tabs on the listing are the General Fast Tab and the Listing Fast Tab.

Listing - General Fast Tab		
Field	Description	Example Value
Sales Channel Code	The Sales Channel Code this listing is for.	WOOCOMMERCEB2C
Channel Item SKU	The SKU which WooCommerce uses to identify the product.	79999
Type	The Business Central Sales Line Type that this listing links:	Item

	<ul style="list-style-type: none"> Item: The listing links to a D365 BC Item. G/L Account: The Listing links to a D365 BC General Ledger Account. Resource: The Listing links to a D365 BC Resource. Charge (Item): The Listing links to a D365 BC Item Charge. <p>Note that the Wizard will only build Listings for Items, however, you could create a listing manually with a different item type. Example use case: You would like your customers to be able to donate to a charity on your site, you could then record these donations to a "Due to Charity" G/L account on the Sales Order.</p>	
No.	The No. representing the Type. If the type was Item, this would be the Item No.	1936-S
Variant Code	This is valid for Type Item only. If you are using D365 BC Variants for the item, you can specify which Variant is to be listed in this field.	
Unit of Measure	This is only valid for Type Item. This represents the Unit of Measure for the Item being listed. The wizard will default this to the Item base unit of measure, but you can select which item unit of measure is to be listed.	PCS
Blocked	N.A.	
Channel Product Type	This controls the WooCommerce Product Type (Simple, Configurable, Grouped, Virtual, Bundle, Downloadable). Note that this documentation will only cover Simple Items. Configurable items are possible but requires a more advanced setup of attributes.	Simple

Listing Fast Tab

Field	Description	Example Value
Channel Product Name	The product name representing the listing.	BERLIN Guest Chair, yellow
Channel Short Description	The wizard will default this based on the default settings you specified on the Sales Channel. In this example, CSM defaulted this value to the D365 BC Items "Short Description" Extended Text. It can be changed on the listing card if desired.	Beautiful fabric upholstered chair in vibrant yellow.
CSM Channel Primary Category	<p>The CSM Channel Category linked to this Listing. If your listing does not have an assigned CSM primary category, then WooCommerce will automatically set it as 'Uncategorized'.</p> <p>If you need to change the categories that this item is part of, please go to WooCommerce admin and change it there.</p>	

The next Fast Tab is the **Listing Product Information** Fast Tab. This is a powerful piece of CSM functionality allowing you to add additional product information (descriptions, images, etc.) to the listing that can be sent to WooCommerce.

The CSM Listing Wizard brings product information record(s) for the listing based on the Sales Channel settings.

You can see more details: **click Manage > click View/Edit**. The Product Information Card associated with the Listing is displayed.

Adding a Long HTML Description to the Listing

You can add a Long Description, including HTML tags to the listing by adding a Product Information Record to the listing.

Go to the CSM Listing> click Add Description to Product.

A line will be added to this list with a default Information Type of Description. Enter **Long Description** in the Tags field of this new record.

CSM uses this Tag value to know that this description should be sent to WooCommerce as the Products Long Description.

On the **Listing Product Information > on Manage > View / Edit** and the detail Product Information Card will appear.

We set the Source Type to Blob, which allows for very long descriptive text to be entered. We then go to the Description Fast Tab and enter our text in the Description HTML area. We have now completed the Additional Product Information for our Long Description. If you wish to make changes, just edit the Product Information record again from the CSM Listing and make changes to the Description HTML text.

CSM Listing Attributes

On the Product Information card, CSM also brings in the D365 BC Item Attribute values for a linked item. You can manually maintain them there if you would like, but there is also an update button in the Actions Functions that will sync the attribute values from D365 BC. If you add an attribute and value to the item that is linked to the Channel Category, CSM brings those new or changed values in when you Synchronize Attributes.

Sending the Listing Data to WooCommerce

To have CSM Create this product on WooCommerce:

Open the Listing > click Actions > Click Channel integration > Send All Listing Data to Channel

Note, that if you send up individual components, you should Send Listing Base Info to Channel First, this is the only component function that will create a product on WooCommerce, all others will update an existing WooCommerce product linked by the Listings External ID.

The Send All Listing Data may take a few seconds as it sends information to WooCommerce, but you should end up with the External ID field being populated with a number. If there are any issues, a message in the Last External Update Result should give a completion status, or any errors that may have been received from WooCommerce.

The unit price sent to WooCommerce comes either from the item card or the code indicated on the Sales Channel field 'Product code'. This code is used as the 'sales code' on the Sales Price list table on D365 BC. It combines the sales price and a customer price group.

Product Listing Availability

CSM can also send inventory availability for the product to WooCommerce.

Please review the Sales Channel Settings described in the Sales Channel Setup Section.

For Each Listing on the 'Inventory Information' Fast Tab, make sure to turn on 'External Track Inventory' for the inventory quantity to be sent. The field corresponds to 'Manage Stock' in the WooCommerce Admin portal.

CSM performs a Calculation to determine the value to send to WooCommerce. It then compares that value to the last value sent to WooCommerce and if they are not equal, CSM sends the new value.

The Automation can be set to automatically calculate and send if the value is different. We can also perform these actions manually from the CSM Listing Card. When turning on the switch for Subtract Threshold From Availability and re-calculate, WooCommerce will show the new Qty received from CSM. Also, on the product itself, depending on the qty sent from D365 BC, it will set itself to **out of stock** if less than 1 and it will be **in stock** if the quantity is greater than zero.

The listing is then updated with the Available Last Qty Sent and the Availability Requires Update switch is turned off.