

CSM-CPM CONNECTOR

A Suite Engine Application

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Setup Guide

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SETUP GUIDE

This document presents setup information regarding the *CSM-CPM Connector* for Dynamics 365 Business Central.

Please ensure that the CPM and CSM applications, as well as all their dependent applications, are correctly installed in your Microsoft Dynamics 365 Business Central instance before proceeding.

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Introduction

Suite Engine offers two separate solutions that allow Microsoft Dynamics 365 Business Central users to integrate external platforms to their ERP system:

- Channel Sales Manager (CSM) provides integration between Business Central and an external eCommerce platform. CSM supports the entire eCommerce lifecycle, including order management, inventory availability, and listing management. With CSM, users can retrieve orders from an external channel into Business Central, generate corresponding Business Central sales orders records, and keep both the ERP and eCommerce platforms in sync as the order is updated. While CSM effectively serves as a template that can facilitate connectivity to any eCommerce platform, Suite Engine provides out-of-the-box integrations to Amazon, BigCommerce, Magento, Shopify, and WooCommerce.
- Channel Payments Manager (CPM) provides integration between Business Central and an external digital payment platform. CPM allows users to record digital payments against Business Central customers, sales orders, and posted invoices, then communicate this information to a connected payment platform. CPM also supports the generation of payment requests from within Business Central, as well as the retrieval of additional, non-ERP initiated activity from the external environment. While CPM effectively serves as a template that can facilitate connectivity to any digital payment platform, Suite Engine provides an out-of-the-box to Stripe.

Both CSM and CPM share a common core architecture that manages the necessary API calls that facilitate the transfer of information to and from Business Central and a connected platform. This core framework also includes the necessary routines to automate these activities. In this way, these extensions promote a multi-channel or multi-platform experience in which transactions are retrieved into Business Central and managed in the same manner, regardless of their point of origin.

CSM and CPM serve different needs, and are designed to operate entirely independently from one another. However, if an organization deploys both extensions into the same environment, it is possible to integrate them with each other, using the *CSM-CPM Connector*. The *CSM-CPM Connector* provides a seamless transition of activity from one extension to another. When a customer places an order through an eCommerce platform and pays through an integrated payment platform, CSM will retrieve the order into Business Central. Standard order handling and shipping activities are handled through CSM, while the payment management components of the order are automatically handed off to CPM. In this way, users can manage all aspects of the transaction from within the ERP environment.

This guide will present the necessary setup and configuration steps you must complete in order to integrate your CSM and CPM extensions.

Regardless of which sales channel you are using, the overall setup process remains the same: you must set up or identify Stripe as a valid payment method, then perform setup activities for the channel in Business Central. Please select your platform from the list of CSM integrations that currently support connectivity to Stripe:

- [*CSM for BigCommerce*](#)
- [*CSM for Magento*](#)
- [*CSM for WooCommerce*](#)

CSM for BigCommerce

Connecting BigCommerce to Stripe

A Stripe account includes access to production and test environments. This allows users to test out new products and processes in a separate environment from the live platform on which actual payments are processed.

You can connect to your Stripe account directly from within BigCommerce:

1. Log in to your BigCommerce account.
2. Choose the **Settings** menu item on the lefthand side of the page, then choose the **Payments** menu item in the **Setup** group.
3. On the **Payment Methods** screen, locate the payment method line for Stripe, then choose the **Set up** button.
4. On the **Stripe Settings** tab, choose the **Connect with Stripe** button.
5. Log in to your Stripe account.

You must be logged out of your Stripe dashboard before attempting to log into Stripe from BigCommerce.

6. Once you have established a connection between BigCommerce and your Stripe account, you can enter other values on the **Stripe Settings** tab to reflect your desired business processes. None of these settings are necessary to support the *CSM-CPM Connector*. We do recommend that you review the following settings, however:
 - **Transaction Type:** indicate whether you want to only authorize or authorize and capture credit card payments that are made to the BigCommerce store. In general, it is recommended that you authorize only, but depending on your business processes, you may wish to authorize and capture credit card activity when it is recorded. The *CSM-CPM Connector* will support either option, regardless.
 - **Test Mode:** enabling this option will send order payments to your test environment in Stripe. It is recommended that you initially enable this setting; when you are ready to go live with your integration, you can change this setting to send payments to your live Stripe environment.
 - **Enable stored credit cards with Stripe:** placing a check mark in this field will instruct BigCommerce to save entered credit cards in Stripe. It is recommended that you enable this feature to support credit card reauthorization scenarios.
7. Choose the **Save** button.

The process of configuring your integration between BigCommerce and Stripe is completed.


CSM-CPM Connector Setup and Configuration

Once you have connected BigCommerce to Stripe, there are certain Business Central setup and configuration activities that must be completed in order for the *CSM-CPM Connector* to operate as designed.

Note: *this material addresses the specific setup and configuration activities that must be performed to enable the CSM-CPM Connector, and does not walk through the standard configuration activities that would be a part of setting up a CSM or CPM solution. For more detailed information on how to set up one of these extensions, please consult the related documentation.*

Managing the CSM-CPM Connector


The *CSM-CPM Connector* is comprised of a separate extension, which you must download from Microsoft AppSource and install within your Business Central environment. Once installed, it is necessary to enable external communication for this extension:

1. Choose the  icon, enter **Extension Management**, and then choose the related link.
2. On the **Extension Management** page, choose the *CSM-CPM Connector* extension.
3. Choose the **Configure** action on the **Manage** tab in the ribbon.
4. On the **Extension Settings** page, select the *Allow HttpClientRequests* check box.

CSM Sales Channel Settings

Each connected eCommerce site or channel is set up as a separate CSM sales channel within Business Central. The CSM sales channel has a number of configuration settings that allow you to dictate how CSM will process retrieved channel orders.

With the presence of the *CSM-CPM Connector*, it is necessary to set a few sales channel fields to specific values in order for the integration between extensions to work properly:


1. Choose the  icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the CSM sales channel record you are integrating to CPM.
3. Open the **Order Management** FastTab.
4. In the **Payment Behavior** field, choose the *Payments* option.

CSM Payment Methods

Within CSM, it is possible to define “CSM payment methods” for each sales channel. CSM payment methods allow users to link payment method records between the connected eCommerce channel and Business Central. When a channel order is retrieved into Business Central, CSM uses this mapping to assign the desired payment method code to the corresponding sales order.

When the *CSM-CPM Connector* is installed, it is also possible to map CSM channel payment methods to CPM payment platforms. When a channel order is retrieved into Business Central, this additional mapping is used by the *CSM-CPM Connector* to determine which CPM payment platform should be used for payment processing.

To map a CSM payment method to a CPM payment platform:

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 map payment methods.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Payment Methods** action.
4. In the **CSM Payment Methods** window, choose the line for the payment method you want to map to a CPM payment platform.
5. In the **CPM Payment Platform Code** field, enter or use the AssistButton to assign a payment platform.
6. If any option fields (**Auto Application**, **Single Capture**, **Perform Invoice Capture**, and **Perform Capture for Zero Amt**) are enabled, they must be unchecked. These option fields instruct CSM as to how invoice payment activity



should be captured and communicated to the external channel. Because this activity will now be performed by the assigned CPM payment platform, we do not want CSM to continue to attempt these processes.

In addition to this mapping, it is recommended that the Business Central payment method that you have mapped to the channel payment method in the **Payment Method Code** field should not have a defined balancing account. If a balancing account is assigned to the payment method, Business Central will automatically post a balancing entry to that account on transactions to which the payment method is assigned. While this is applicable for some transaction types, such as cash payments, it is not preferable for digital payments.

The CSM-CPM Connector and BigCommerce

The *CSM-CPM Connector* exists as a bridge between your CSM sales channels and CPM payment platforms; it in and of itself does not contain any new functionality or require particular processing activities. When the *CSM-CPM Connector* is installed and configured, CSM will no longer capture payments for retrieved eCommerce orders; this process is instead handed off to CPM. Payments will be captured according to the configuration settings of the CPM payment platform that has been [mapped to the relevant CSM payment method](#). Depending on these settings, this will include the following activities:

- Customer records that are created via CSM will be automatically set up in Stripe, where their entered payment method is also stored.
- Captured payments are automatically recorded in Business Central and Stripe.
- Delayed capture payments are recorded as authorizations in Stripe. They will eventually be automatically or manually captured depending upon platform setup, at which point they are recorded in Business Central.
- Partial invoicing of an authorized payment will re-authorize the remaining payment amount depending on platform setup.

While the features and functionality described above work in the same basic manner across all supported sales channels, certain characteristics of a given platform may impact or limit behavior. In the instance of BigCommerce, the following scenarios are unique:

- Reauthorization of credit card payments can only occur against credit cards that have been saved during the checkout process. You can enable this option when you are [configuring the Stripe integration in BigCommerce](#). When this feature is enabled, customers will have the option to save a credit card at the time of purchase.

CSM for Magento

Connecting Magento to Stripe

A Stripe account includes access to production and test environments. This allows users to test out new products and processes in a separate environment from the live platform on which actual payments are processed. Although these two environments are set up under the same account, they have their own, dedicated credentials.

It is recommended that you initially link Magento to your test environment in Stripe. To do so, you must obtain the necessary credentials from Stripe:

1. Log in to your Stripe account.
2. Enable the **Test Mode** setting in the upper righthand corner of the Home page.
3. Choose the **Developers** menu item (located next to the **Test Mode** setting).
4. On the Developers dashboard, choose the **API Keys** menu item.
5. The API Keys page presents the credentials that are used to authenticate API requests to your Stripe test account.
6. Copy and paste the **Publishable Key** and **Secret Key** values from this page to your clipboard.

Note: to obtain the credentials for your live Stripe environment, you can disable the **Test Mode** setting described in step 2 above, then repeat the subsequent steps.

For additional information on Stripe's API keys and how they are used, see [here](#).

Now that you have your Stripe credentials, you can use them to create a webhook from Magento:

1. Log in to your Magento account.
2. Choose the **Stores** menu item on the lefthand side of the page, then choose the **Configuration** menu item in the **Settings** group.
3. On the **Configuration** screen, choose the **Sales** menu, then choose the **Payment Methods** menu item.
4. Locate the payment method line for Stripe, then choose the **Configure** button.
5. Open the **General Settings** group.
6. In the **Mode** field, select **Test**.
7. In the **Test publishable API key** field, enter the publishable key you copied from your Stripe test environment.
8. In the **Test secret API key** field, enter the secret key you copied from your Stripe test environment.
9. Choose the **Configure** button next to the **Webhooks** field. This will create a new Magento webhook in your Stripe environment.

Note: when you want to connect your Magento store to your live environment in Stripe, you must change the **Mode** field to **Live**, then repeat the subsequent steps with the credentials you obtained for Stripe's live environment.

You can also adjust settings for credit card payments:

1. Open the **Payments** group, then choose the **Payment flow settings** group, then the **Cards** group.
2. Select the **Yes** option in the **Enabled** field.

3. Enter values in the other fields to reflect your desired business processes. None of these settings are necessary to support the *CSM-CPM Connector*. We do recommend that you review the following settings, however:
 - **Payment action:** indicate whether you want to only authorize or authorize and capture credit card payments that are made to the Magento store. In general, it is recommended that you authorize only, but depending on your business processes, you may wish to authorize and capture credit card activity when it is recorded. The *CSM-CPM Connector* will support either option, regardless.
 - **Expired authorizations:** indicate whether you want to instruct Stripe to attempt to automatically re-authorize expired authorizations against the entered card or cancel any expired authorizations.
4. Choose the **Save Config** button.

For more information on connecting Stripe to your Magento environment, see [here](#).

Once you have created the Magento webhook, it is necessary to return to Stripe and make some modifications:

1. Log in to your Stripe account.
2. Choose the **Developers** menu item (located next to the **Test Mode** setting).
3. On the Developers dashboard, choose the **Webhooks** menu item.
4. Choose the newly-created webhook for your Magento store.
5. Choose the options button (the “three dots” that appears next to the webhook name) and choose the **Update details** action.
6. The webhook details page presents a list of events that were automatically created along with the webhook itself. Edit these events as follows:

Required Events

The following events are required by the *CSM-CPM Connector*:

- charge.failed
- charge.refunded
- charge.succeeded
- invoice.finalized
- invoice.paid
- invoice.payment_failed
- invoice.payment_succeeded
- invoice.voided
- payment_intent.payment_failed
- payment_intent.succeeded

No action is required, but you must ensure that they are not removed.

Remove Events

You must remove the following event:

- `charge.captured`

If this event is present, the *CSM-CPM Connector* will fail to work as intended.

Optional Events

The following events are not used by the *CSM-CPM Connector*:

- `checkout.session.expired`
- `customer.source.updated`
- `customer.card.updated`
- `customer.bank_account.updated`
- `customer.subscription.created`
- `review.closed`
- `source.chargeable`
- `source.canceled`
- `source.failed`
- `source.transaction.created`
- `product.created`

Keeping these events will not have any impact on the *CSM-CPM Connector*, but in general it is recommended that any unnecessary events be removed for better performance.

Note: *it may be that some of these events that are not required by the CSM-CPM Connector are required for another extension or application that you have installed in your Magento environment. If you have installed any other applications that work with Stripe in Magento, please review their requirements before deleting any events.*

7. When you have finished removing any webhooks, choose the **Update endpoint** button.

The process of configuring your integration between Magento and Stripe is completed.


CSM-CPM Connector Setup and Configuration

Once you have connected Magento to Stripe, there are certain Business Central setup and configuration activities that must be completed in order for the *CSM-CPM Connector* to operate as designed.

Note: *this material addresses the specific setup and configuration activities that must be performed to enable the CSM-CPM Connector, and does not walk through the standard configuration activities that would be a part of setting up a CSM or CPM solution. For more detailed information on how to set up one of these extensions, please consult the related documentation.*

Managing the CSM-CPM Connector


The *CSM-CPM Connector* is comprised of a separate extension, which you must download from Microsoft AppSource and install within your Business Central environment. Once installed, it is necessary to enable external communication for this extension:

1. Choose the  icon, enter **Extension Management**, and then choose the related link.
2. On the **Extension Management** page, choose the *CSM-CPM Connector* extension.
3. Choose the **Configure** action on the **Manage** tab in the ribbon.
4. On the **Extension Settings** page, select the *Allow HttpClientRequests* check box.

CSM Sales Channel Settings

Each connected eCommerce site or channel is set up as a separate CSM sales channel within Business Central. The CSM sales channel has a number of configuration settings that allow you to dictate how CSM will process retrieved channel orders.

With the presence of the *CSM-CPM Connector*, it is necessary to set a few sales channel fields to specific values in order for the integration between extensions to work properly:


1. Choose the  icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the CSM sales channel record you are integrating to CPM.
3. Open the **Order Management** FastTab.
4. In the **Payment Behavior** field, choose the *Payments* option.

CSM Payment Methods

Within CSM, it is possible to define “CSM payment methods” for each sales channel. CSM payment methods allow users to link payment method records between the connected eCommerce channel and Business Central. When a channel order is retrieved into Business Central, CSM uses this mapping to assign the desired payment method code to the corresponding sales order.

When the *CSM-CPM Connector* is installed, it is also possible to map CSM channel payment methods to CPM payment platforms. When a channel order is retrieved into Business Central, this additional mapping is used by the *CSM-CPM Connector* to determine which CPM payment platform should be used for payment processing.

To map a CSM payment method to a CPM payment platform:

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 map payment methods.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Payment Methods** action.
4. In the **CSM Payment Methods** window, choose the line for the payment method you want to map to a CPM payment platform.
5. In the **CPM Payment Platform Code** field, enter or use the AssistButton to assign a payment platform.
6. If any option fields (**Auto Application**, **Single Capture**, **Perform Invoice Capture**, and **Perform Capture for Zero Amt**) are enabled, they must be unchecked. These option fields instruct CSM as to how invoice payment activity



should be captured and communicated to the external channel. Because this activity will now be performed by the assigned CPM payment platform, we do not want CSM to continue to attempt these processes.

In addition to this mapping, it is recommended that the Business Central payment method that you have mapped to the channel payment method in the **Payment Method Code** field should not have a defined balancing account. If a balancing account is assigned to the payment method, Business Central will automatically post a balancing entry to that account on transactions to which the payment method is assigned. While this is applicable for some transaction types, such as cash payments, it is not preferable for digital payments.

The CSM-CPM Connector and Magento

The *CSM-CPM Connector* exists as a bridge between your CSM sales channels and CPM payment platforms; it in and of itself does not contain any new functionality or require particular processing activities. When the *CSM-CPM Connector* is installed and configured, CSM will no longer capture payments for retrieved eCommerce orders; this process is instead handed off to CPM. Payments will be captured according to the configuration settings of the CPM payment platform that has been [mapped to the relevant CSM payment method](#). Depending on these settings, this will include the following activities:

- Customer records that are created via CSM will be automatically set up in Stripe, where their entered payment method is also stored.
- Captured payments are automatically recorded in Business Central and Stripe.
- Delayed capture payments are recorded as authorizations in Stripe. They will eventually be automatically or manually captured depending upon platform setup, at which point they are recorded in Business Central.
- Partial invoicing of an authorized payment will re-authorize the remaining payment amount depending on platform setup.

CSM for WooCommerce

Connecting WooCommerce to Stripe

Before you can configure your accounts, it is necessary to download and install a Stripe plugin in your WooCommerce environment. The *CSM-CPM Connector* has been tested and validated against the [Payment Plugins for Stripe plugin](#); the setup instructions that follow assume you have downloaded and installed this plugin in your WooCommerce environment.

A Stripe account includes access to production and test environments. This allows users to test out new products and processes in a separate environment from the live platform on which actual payments are processed.

It is recommended that you initially link WooCommerce to your test environment in Stripe. To do so, you must obtain the necessary credentials from Stripe:

1. Log in to your Stripe account.
2. Enable the **Test Mode** setting in the upper righthand corner of the Home page.
3. Choose the **Developers** menu item (located next to the **Test Mode** setting).
4. On the Developers dashboard, choose the **API Keys** menu item.
5. The API Keys page presents the credentials that are used to authenticate API requests to your Stripe test account.
6. Copy and paste the **Publishable Key** and **Secret Key** values from this page to your clipboard.

Note: to obtain the credentials for your live Stripe, you can disable the **Test Mode** setting described in step 2 above, then repeat the subsequent steps.

For additional information on Stripe's API keys and how they are used, see [here](#).

Now that you have your Stripe credentials, you can use them to create a webhook from WooCommerce:

1. Log in to your WooCommerce account.
2. Choose the **Plugins** menu item on the lefthand side of the page, then choose the **Payment Plugins for Stripe WooCommerce** line and select the **Settings** action.
3. On the **API Settings** tab, in the **Mode** field, select **Test**.
4. In the **Test Publishable Key** field, enter the publishable key you copied from your Stripe test environment.
5. In the **Test Secret Key** field, enter the secret key you copied from your Stripe test environment.
6. Choose the **Connection Test** button to validate that the keys you have entered are correct. If this information is correct, a message will inform you that the test was successful.
7. Choose the **Create Webhook** button. This will create a new WooCommerce webhook in your Stripe environment.
8. Choose the **Save changes** button.

Note: when you want to connect your WooCommerce store to your live environment in Stripe, you must change the **Mode** field to **Live**, then repeat the subsequent steps with the credentials you obtained for Stripe's live environment.

You can also adjust settings for credit card payments:

9. Choose the **Credit/Debit Cards** tab.
10. Place a check mark in the **Enabled** field.
11. Enter values in the other fields to reflect your desired business processes. None of these settings are necessary to support the *CSM-CPM Connector*. We do recommend that you review the following settings, however:
 - **Charge Type:** indicate whether you want to only authorize or authorize and capture credit card payments that are made to the WooCommerce store. In general, it is recommended that you authorize only, but depending on your business processes, you may wish to authorize and capture credit card activity when it is recorded. The *CSM-CPM Connector* will support either option, regardless.
 - **Allow Credit Card Save:** placing a check mark in this field will instruct WooCommerce to save entered credit cards in Stripe. It is recommended that you enable this feature to support credit card reauthorization scenarios.
12. Choose the **Save changes** button.

The process of configuring your integration between WooCommerce and Stripe is completed.


CSM-CPM Connector Setup and Configuration

Once you have connected WooCommerce to Stripe, there are certain Business Central setup and configuration activities that must be completed in order for the *CSM-CPM Connector* to operate as designed.

***Note:** this material addresses the specific setup and configuration activities that must be performed to enable the CSM-CPM Connector, and does not walk through the standard configuration activities that would be a part of setting up a CSM or CPM solution. For more detailed information on how to set up one of these extensions, please consult the related documentation.*

Managing the CSM-CPM Connector


The *CSM-CPM Connector* is comprised of a separate extension, which you must download from Microsoft AppSource and install within your Business Central environment. Once installed, it is necessary to enable external communication for this extension:

1. Choose the  icon, enter **Extension Management**, and then choose the related link.
2. On the **Extension Management** page, choose the *CSM-CPM Connector* extension.
3. Choose the **Configure** action on the **Manage** tab in the ribbon.
4. On the **Extension Settings** page, select the *Allow HttpClientRequests* check box.

CSM Sales Channel Settings

Each connected eCommerce site or channel is set up as a separate CSM sales channel within Business Central. The CSM sales channel has a number of configuration settings that allow you to dictate how CSM will process retrieved channel orders.

With the presence of the *CSM-CPM Connector*, it is necessary to set a few sales channel fields to specific values in order for the integration between extensions to work properly:

1. Choose the  icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the CSM sales channel record you are integrating to CPM.
3. Open the **Order Management** FastTab.

4. In the **Payment Behavior** field, choose the *Payments* option.
5. In the **Send Shipment When** field, choose either the *Scheduled* (recommended) or *Manual* option.


You cannot choose the *Immediate* option to send shipment information from Business Central to WooCommerce at the time of order posting if you want CPM to capture payment information. This is because the concept of a dedicated invoicing activity does not exist in WooCommerce and as soon as an order is marked as shipped and complete, WooCommerce will automatically capture an authorized payment.

CSM Payment Methods

Within CSM, it is possible to define “CSM payment methods” for each sales channel. CSM payment methods allow users to link payment method records between the connected eCommerce channel and Business Central. When a channel order is retrieved into Business Central, CSM uses this mapping to assign the desired payment method code to the corresponding sales order.

When the *CSM-CPM Connector* is installed, it is also possible to map CSM channel payment methods to CPM payment platforms. When a channel order is retrieved into Business Central, this additional mapping is used by the *CSM-CPM Connector* to determine which CPM payment platform should be used for payment processing.

To map a CSM payment method to a CPM payment platform:

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 map payment methods.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Payment Methods** action.
4. In the **CSM Payment Methods** window, choose the line for the payment method you want to map to a CPM payment platform.
5. In the **CPM Payment Platform Code** field, enter or use the AssistButton to assign a payment platform.
6. If any option fields (**Auto Application**, **Single Capture**, **Perform Invoice Capture**, and **Perform Capture for Zero Amt**) are enabled, they must be unchecked. These option fields instruct CSM as to how invoice payment activity should be captured and communicated to the external channel. Because this activity will now be performed by the assigned CPM payment platform, we do not want CSM to continue to attempt these processes.

In addition to this mapping, it is recommended that the Business Central payment method that you have mapped to the channel payment method in the **Payment Method Code** field should not have a defined balancing account. If a balancing account is assigned to the payment method, Business Central will automatically post a balancing entry to that account on transactions to which the payment method is assigned. While this is applicable for some transaction types, such as cash payments, it is not preferable for digital payments.

The CSM-CPM Connector and WooCommerce

The *CSM-CPM Connector* exists as a bridge between your CSM sales channels and CPM payment platforms; it in and of itself does not contain any new functionality or require particular processing activities. When the *CSM-CPM Connector* is installed and configured, CSM will no longer capture payments for retrieved eCommerce orders; this process is instead handed off to CPM. Payments will be captured according to the configuration settings of the CPM payment platform that has been [mapped to the relevant CSM payment method](#). Depending on these settings, this will include the following activities:



- Customer records that are created via CSM will be automatically set up in Stripe, where their entered payment method is also stored.
- Captured payments are automatically recorded in Business Central and Stripe.
- Delayed capture payments are recorded as authorizations in Stripe. They will eventually be automatically or manually captured depending upon platform setup, at which point they are recorded in Business Central.
- Partial invoicing of an authorized payment will re-authorize the remaining payment amount depending on platform setup.

While the features and functionality described above work in the same basic manner across all supported sales channels, certain characteristics of a given platform may impact or limit behavior. In the instance of WooCommerce, the following scenarios are unique:

- When a customer checks out as a guest, the *CSM-CPM Connector* will not establish a payment platform link between the Business Central and customer records that are subsequently created. This is because Stripe sets these up as guest customers, and does not assign the dedicated customer ID that CPM would use to create a link to them. Although the customer link is not established, all payment information for the specific transaction remains associated to the proper orders and records.
- It is not possible to fully ship and not invoice a WooCommerce order with the intention of invoicing it at a later date. This is because the concept of a dedicated invoicing activity does not exist in WooCommerce and as soon as an order is marked as shipped and complete, WooCommerce will automatically capture an authorized payment.

It is, however, possible to partially ship and invoice a WooCommerce order, then ship and invoice the remainder at a later date.

- Reauthorization of credit card payments can only occur against credit cards that have been saved during the checkout process. You can enable this option when you are [configuring the Stripe integration in WooCommerce](#). When this feature is enabled, customers will have the option to save a credit card at the time of purchase.