CSM FOR WOOCOMMERCE

An App by Suite Engine

Microsoft Dynamics 365 Business Central

Order Management Setup

Release: 3.0

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ORDER MANAGEMENT SETUP

Channel Sales Manager (CSM) for WooCommerce | Release: 3.0

(D365 Business Central Version: Platform 21.0.46384.47190 + Application 21.0.46256.47284)

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

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

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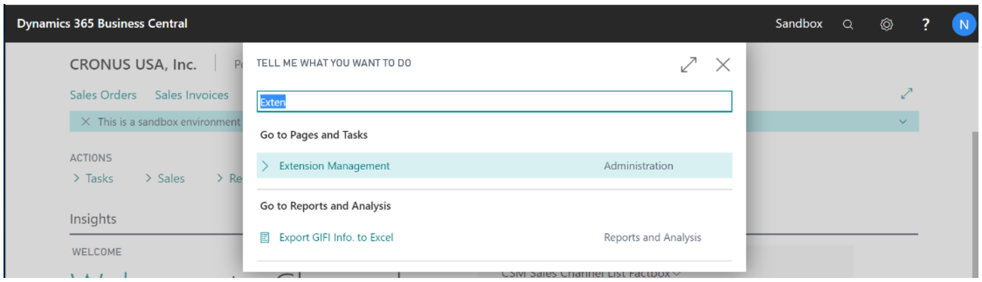
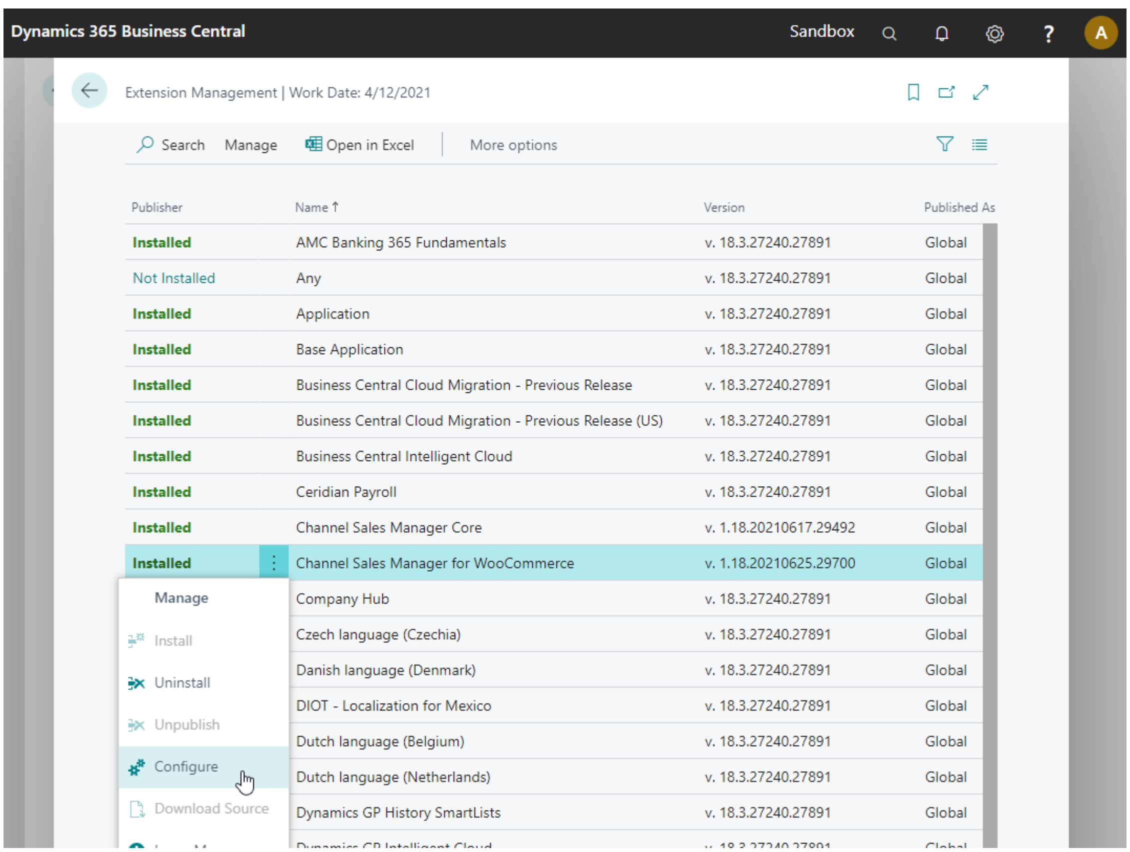
CSM Initial Setup

Manage the CSM for WooCommerce Extension

CSM requires a setting to allow it to initiate communication to WooCommerce. 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 WooCommerce” in the list of extensions, select the ellipsis (three vertical dots), and then select “configure” from the drop-down menu.



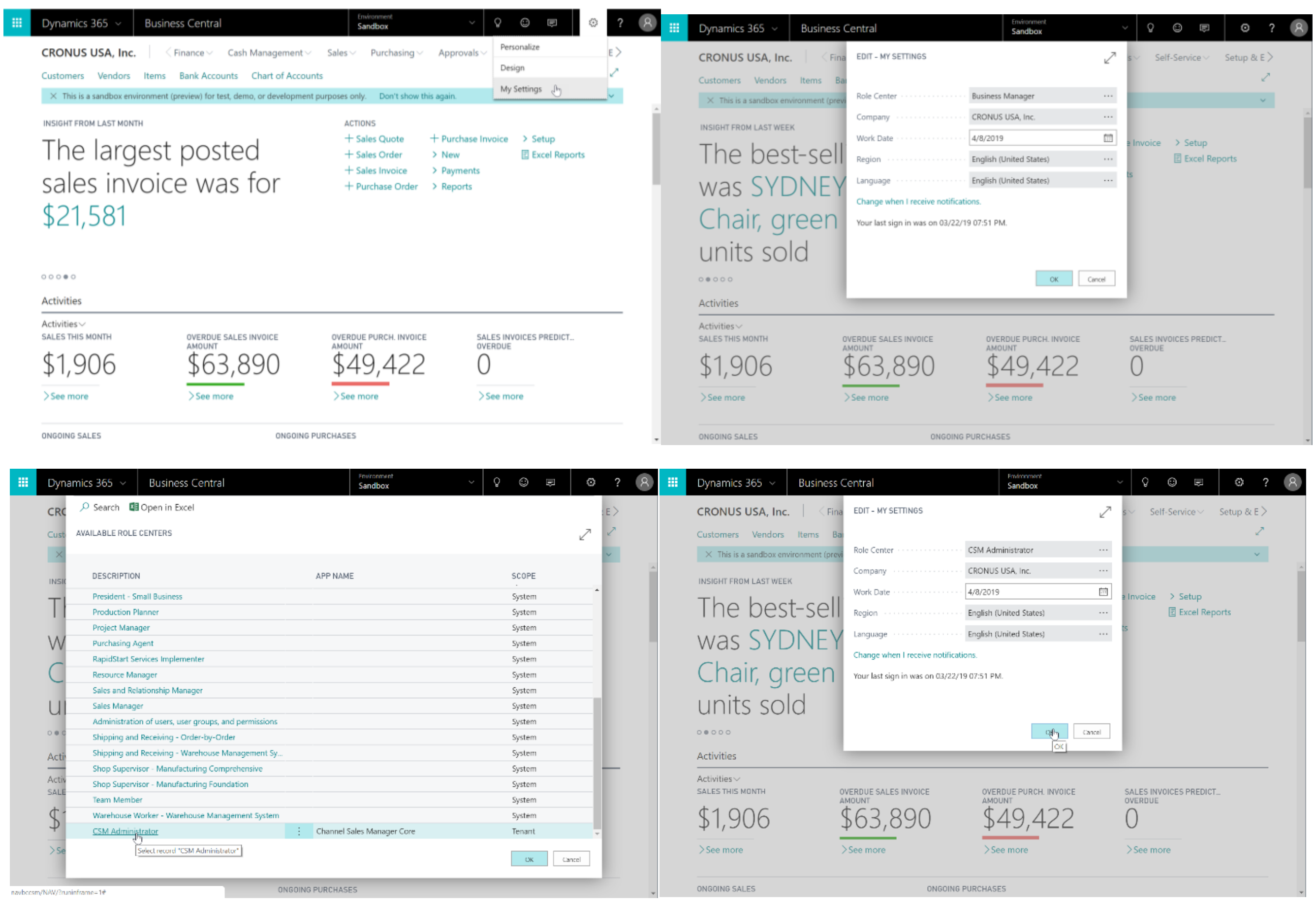
Ensure that the “Allow HttpClient Requests” switch is on.

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.

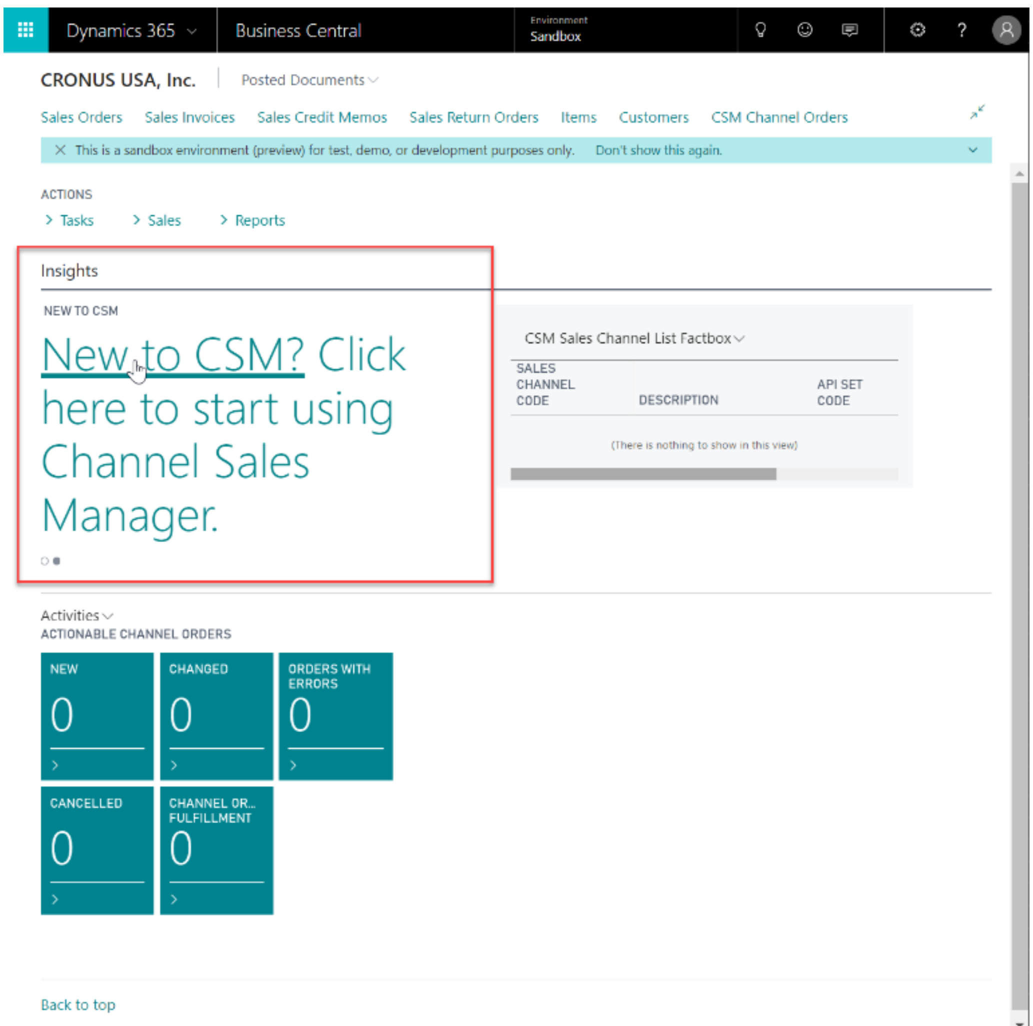
For more info on CSM Role Center refer to [CSM Role Center Headlines].

CSM Setup

To initially setup CSM for WooCommerce, you first need to load the API and Sales Channel Data for your WooCommerce 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:

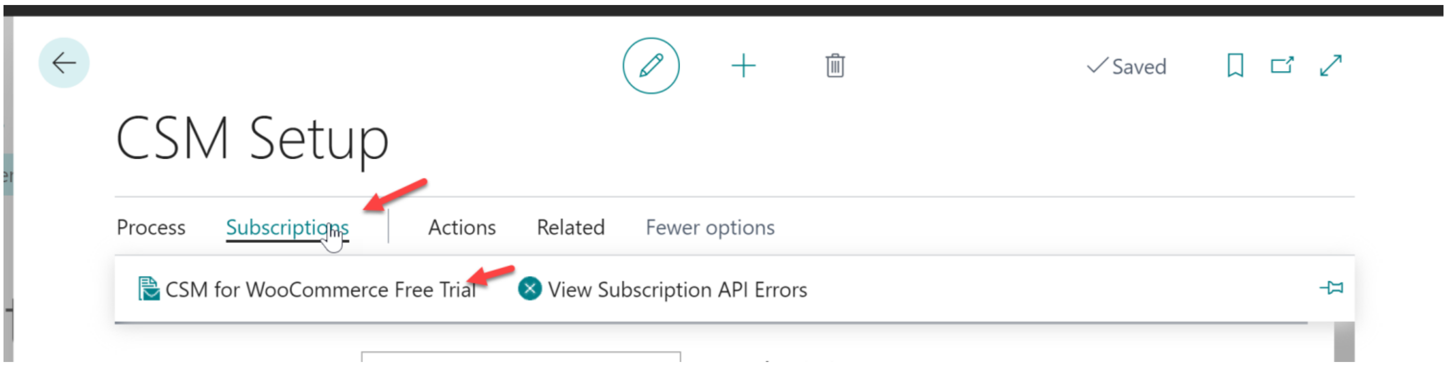
- You can search for CSM Setup by pressing the light bulb and entering "CSM Setup."
- From the CSM Administrator Role Center, chose the "CSM" action, then select the "CSM Setup" option.
- Wait for the CSM Administrator Role Center Insights pane to display "New to CSM?" and click the hyperlink.



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

Creating and Managing Your CSM Subscription

If CSM for WooCommerce is your first CSM product, it is necessary to create a new CSM subscription. CSM uses Stripe as its subscription and payment management service, but the process of setting up a new subscription can be performed from the CSM Setup page within Business Central. On the Registration and Billing Information FastTab, you must enter a company name, contact e-mail, address, and phone number information, then choose the Subscriptions ribbon and select the CSM for WooCommerce 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 WooCommerce. If you wish to use CSM for WooCommerce 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 WooCommerce 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 WooCommerce is being installed in a Business Central environment in which other CSM solutions have been deployed, the trial subscription will be created for the customer ID subscription account that is already assigned in Business Central. However, there may be situations where a Suite Engine subscription account exists but no account details are present in Business Central. A common example of this occurs is when a company is working with separate Business Central test/sandbox and live/production environments. In such a scenario, it is necessary to apply the same subscription to both environments, rather than create (and pay for) two separate subscriptions. It is possible to link a Business Central environment to an existing subscription account by choosing the **Link to Existing Customer** action on the **Actions** tab in the ribbon. In the **Link Existing Customer** page, you must enter the following information:

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

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

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.

Enabling and Receiving CSM Notifications

CSM uses Business Central’s notifications functionality to keep users informed of critical changes that are made to new versions of the application. Enabling this feature is not required, but it is recommended.

To enable CSM notifications:

1. Choose the icon, enter **CSM Setup**, and then choose the related link.
2. On the **CSM Setup** page, turn on the **Enable CSM Notifications** field in the **Notifications** FastTab.
3. Choose the icon, enter **User Setup**, and then choose the related link.
4. On the **User Setup** page, select the user who will receive CSM notifications, then enter a check mark in the **Receive CSM Notifications** field.
5. Repeat this step if additional users will receive CSM notifications.

CSM notifications are stored in a dedicated **CSM Upgrade Notification** table. If a new version of a CSM extension requires action on your part, Suite Engine will include the relevant information in this table. You can access this table via standard Business Central search functionality. In addition, any users who are set up to receive upgrade notifications will be presented with a notification directly in their respective role centers when they log into Business Central. This notification will continue to be displayed in the role center until the new upgrade notifications are marked as having action taken.

To take action against a CSM upgrade notification:

1. In the **CSM Upgrade Notifications** page, review the line for the new upgrade notification. Each line contains information about the application for which the notification was created, the version number, and basic description information.

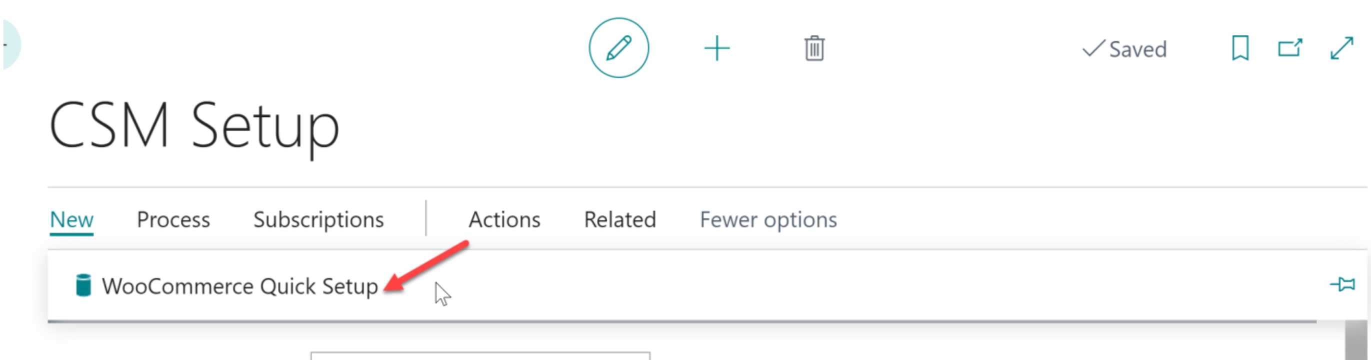
2. If a check mark appears in the **Action Required** field, there is some action you must perform to accommodate changes made with the new product version. Instructions on the steps you need to perform are presented in the notification line's informational fields. In addition, there are two actions on the ribbon that may assist you:
    - **Open Page:** if an action page name is assigned to the notification line, you can choose this action to open the page in Business Central on which you need to perform the necessary upgrade activity.
    - **How-to-Instructions:** if an address is entered in the notification line's **How-to Instructions URL** field, you can choose this action to visit that URL. This allows you to access supporting material that is supplied by Suite Engine, such as a how-to-video or blog post containing instructions and information.
3. When you have performed the necessary action, place a check mark in the **Action Taken** field.

CSM will automatically record the date, time, and user who marked the action as having been taken. If any upgrade notifications are not completed in this way, the designated CSM notifications users in your organization will continue to receive upgrade notifications alerts in their role centers when accessing Business Central.

The CSM for WooCommerce Setup Wizard

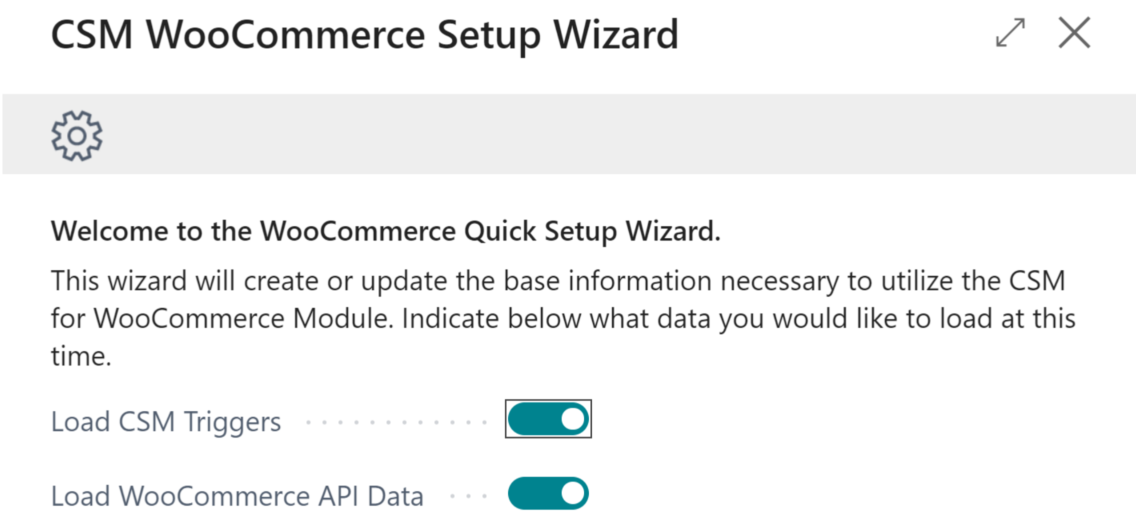
Once you have set up a trial subscription, you are ready to set up your CSM for WooCommerce solution. While it is possible to manually enter the initial setup values, CSM for WooCommerce comes with a setup wizard that streamlines this process; it is recommended that you use this setup wizard to create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

Select Actions -> WooCommerce Quick Setup.



This will start the WooCommerce Setup Wizard.

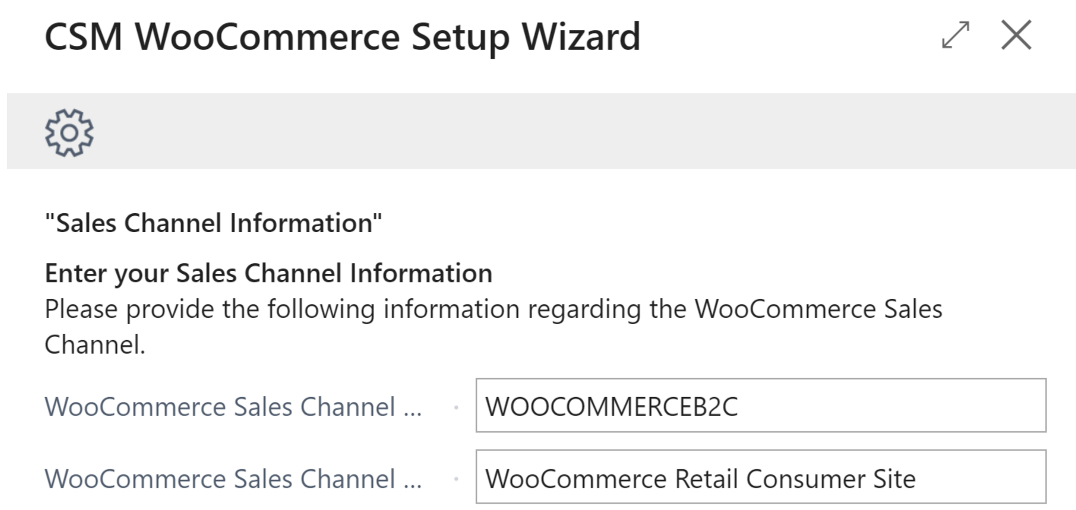
On the first page of the wizard, turn on the switches.



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

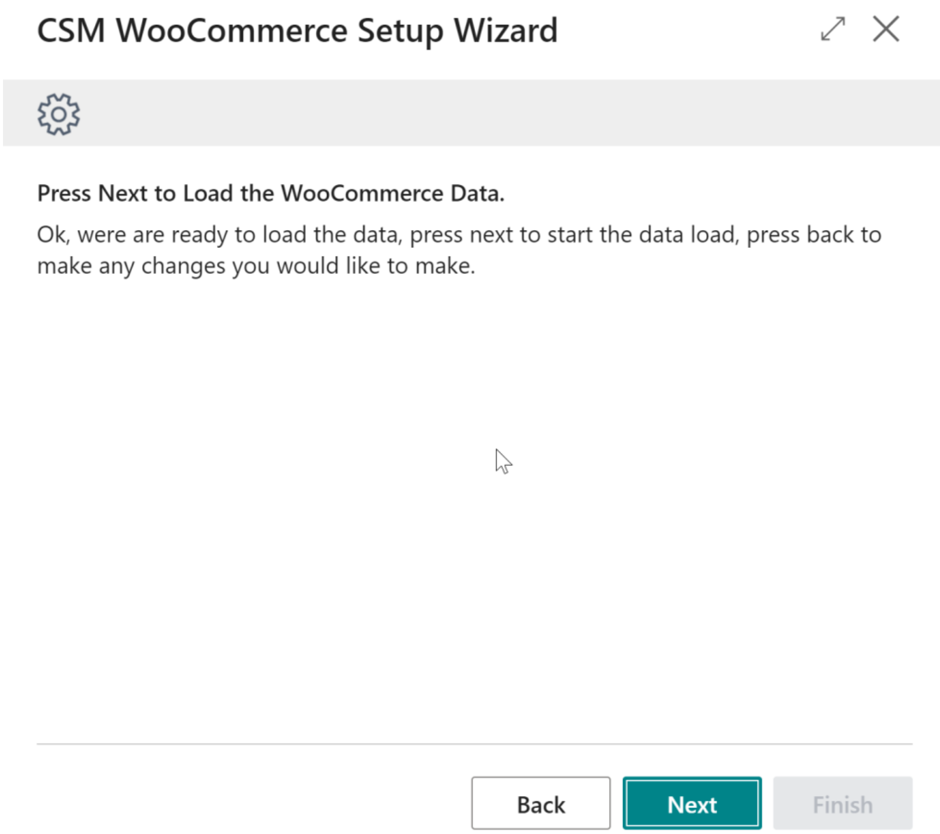
Field	Description	Example Value
WooCommerce API Set Code	This is a unique code that identifies the API set. It can be any value you wish, but we recommend naming it something meaningful that describes the external source the API set communicates with.	WOOCOMMERCE
WooCommerce API Set Description	This 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, WooCommerce 2.xx, Amazon, etc.) and may even require a 2nd API set for an additional WooCommerce 1.x instance you may deploy.	WooCommerce API Data
WooCommerce Website ID	This is the host URL endpoint for soap services on your WooCommerce 1.xx server. Normally it is your WooCommerce store URL with an additional path of /api/v2_soap/index/	http://WooCommerce.mycompany.com/api/v2_soap/index/
WooCommerce REST API Consumer Key / WooCommerce REST API Consumer Secret	For API calls where the URL is store specific, it is necessary for you to generate a REST API key for the store in your WooCommerce environment. Each REST API has unique consumer key and consumer secret values, which can be assigned to the sales channel in Business Central. For information on how to set up a REST API in WooCommerce and then obtain the necessary credentials, see here.	

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



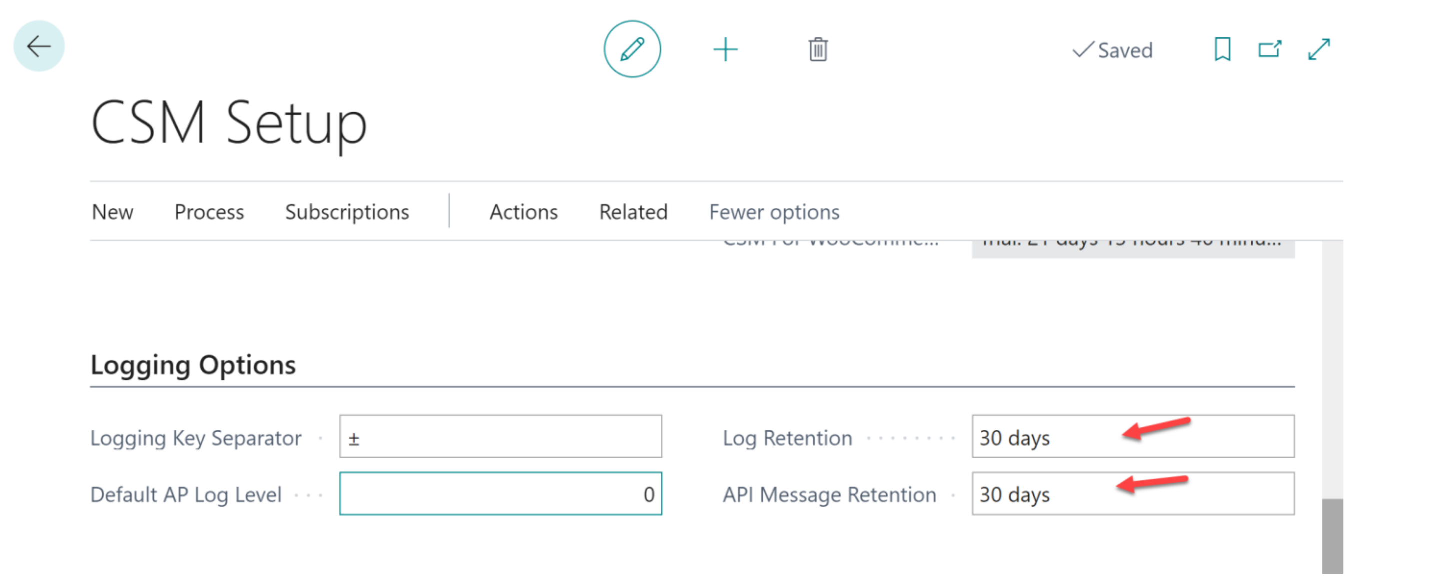
Code	This is unique code that identifies the Sales Channel. It can be any value you wish, but we recommend naming it something meaningful that describes the Sales Channel.	WOOCOMMERCEB2C
Description	This is a text description of the Sales Channel.	WooCommerce Retail Store (B2C)

The fourth page of the wizard is a confirmation page. If you choose "Next," CSM will load and setup the WooCommerce 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.

Obtain Channel Credentials in WooCommerce

As part of the setup process, it is necessary to obtain credentials from your WooCommerce that will grant CSM with the necessary permission to access relevant WooCommerce records. These credentials are assigned to corresponding sales channels in Business Central.

Login to your WooCommerce Admin Portal

The WooCommerce REST API works on a key system to control access. These keys are linked to WordPress users on your website.

1. Go to: **WooCommerce > Settings > Advanced > REST API**.
2. Select **Add Key**. You are taken to the **Key Details** screen
3. Add a **Description**.
4. Select the **User** you would like to generate a key for in the dropdown.
5. Select a level of access for this API key — **Read** access, **Write** access or **Read/Write** access.
6. Select **Generate API Key**, and WooCommerce creates API keys for that user.

Now that keys have been generated, you should see **Consumer Key** and **Consumer Secret** keys, a QR Code, and a Revoke API Key button.

Enter Channel Credentials in Business Central

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

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

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

The credentials that you entered in the setup wizard are used to validate requests to send data between Business Central and an external channel environment. Certain API calls are performed against specific sales channel records and require the presence of credentials at the sales channel record level. In some scenarios, it may be that an organization has multiple sales channels that all use the same credentials. When an API call is made against a sales channel, CSM will use the credentials that exist for the channel’s defined credentialing sales channel to validate that API process.

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

1. To identify a sales channel’s credentials, click on the link “**CSM Sales Channel Code**”.
2. View the credentials that have been defined for a sales channel on the navigation within

the CSM Sales Channel card, click “**Actions**”, then click “**API and Automation**”, and click “**API Credentials**”.

Note: “**API Endpoint URL**” and “**Basic Authentication**” which are the two main credential fields that are recommended to be setup during the CSM Setup process. Think of its function as a password or access key.

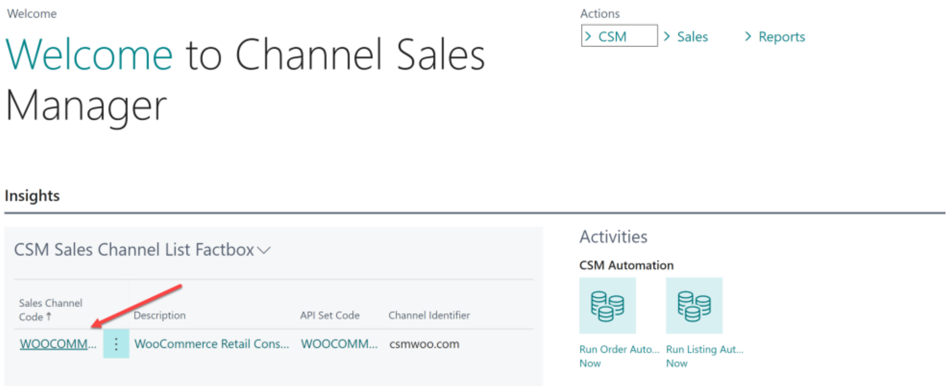
If you entered credentials when you were creating the sales channel via the setup wizard, the necessary API credential records will have been automatically created. If this information was not entered in the setup wizard (and you do not wish to use existing credentials), these records must be manually set up on this API Credentials card.

1. The ability to edit or update API Credentials is in the View-API Credentials card. Within the navigation ribbon click **Manage**, then click **Edit**.

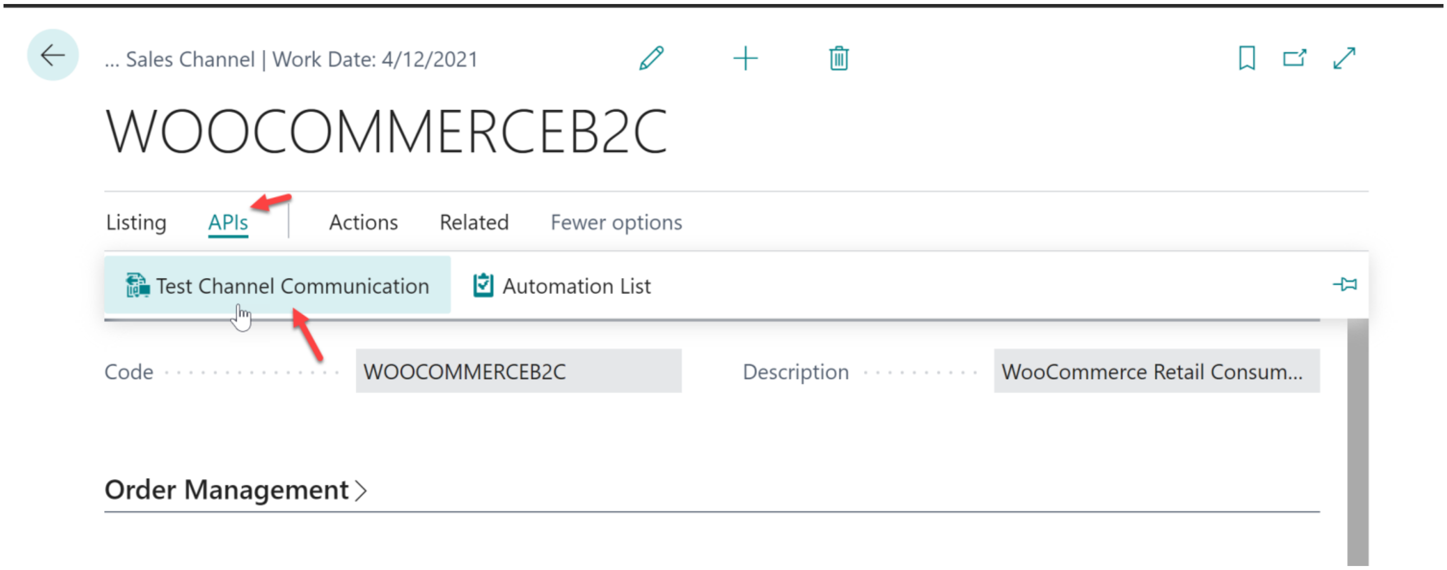
2. The expanded view of the API Credential page will view all credential fields that can be edited.

Verify Channel Connectivity and Retrieve Your First Channel Orders

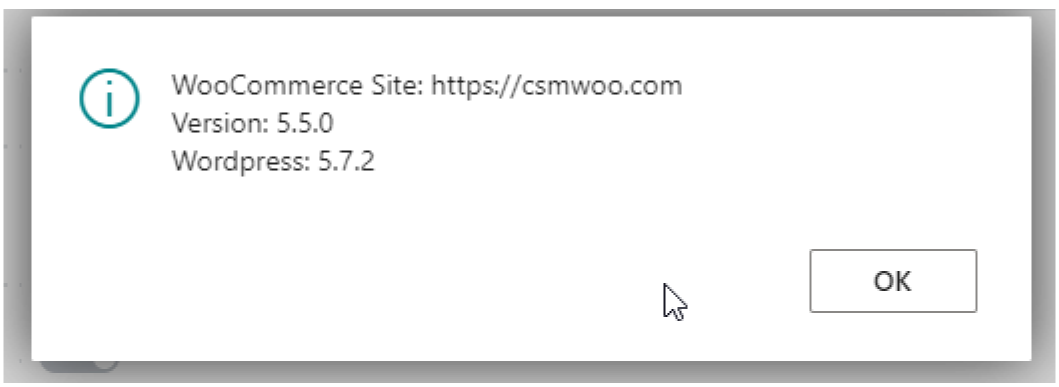
At this point in time, if your host name and credentials are valid, you should be able to conduct a small communication test. After returning to the role center, select the new Sales Channel the setup wizard created.

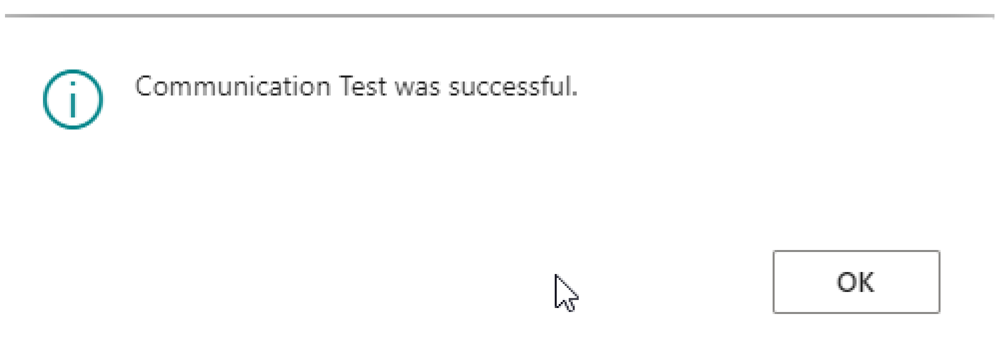


Next, select APIs, then “Test Channel Communication.”



If successful, a dialog showing the WooCommerce Edition and Version should display.





If your communication test is successful, you are now able to retrieve orders from WooCommerce. Each API set for CSM has a series of automation routines that manage different activities, including the retrieval of orders from your external WooCommerce 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 WooCommerce. This starting date and time should be viewed as the cut-off point for when you want to manage WooCommerce 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:

6. Choose the icon, enter **CSM Sales Channels**, and then choose the related link.
7. Open any sales channel record that has the API set for which you want to set a starting date for order retrieval.
8. On the **CSM Sales Channel** page, choose **Related** ribbon, then choose the **Starting Order Date Retrieval** action in the **Setup Actions** menu.
9. On the **CSM User Input** page, enter your desired starting date and time.

> ***Note:*** *We strongly recommend setting your WooCommerce site's time zone setting to UTC, but if you decide that this will not work for your organization, you can use the "Shop Timezone UTC Offset" field on the CSM API Sets page to offset your WooCommerce site's defined time zone from UTC. For example, if your WooCommerce site's time zone was four hours behind UTC, you would enter a value of "-4 hours" in the "Shop Timezone UTC Offset" field. It is important to note that you will have to manually adjust this field to account for any daylight savings time changes in your area. It is for this reason that we recommend using UTC as your WooCommerce site's time zone; in such a scenario, you do not need to worry about setting and maintaining a UTC offset value.*

10. 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 WooCommerce 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

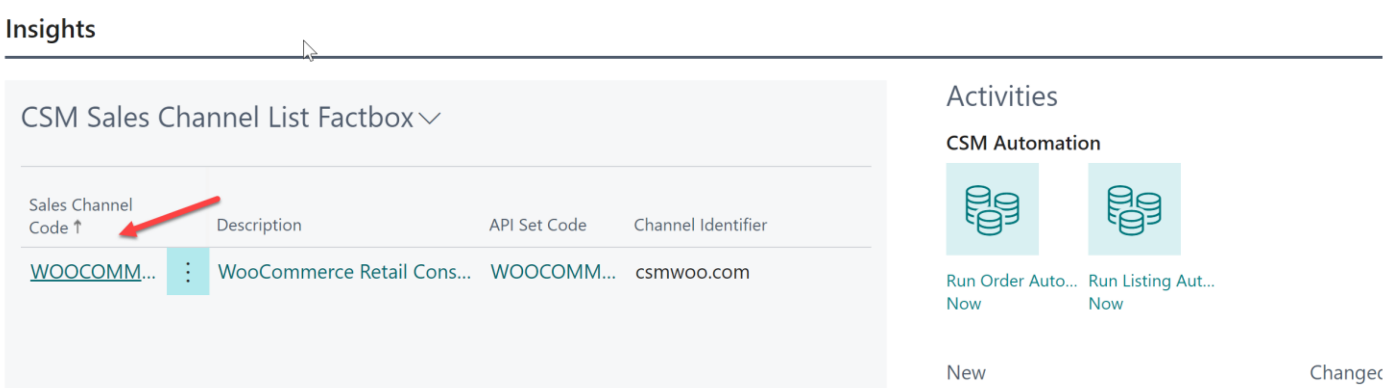
This section will go through the settings that will customize your CSM experience and cross reference your data in Business Central to like data in WooCommerce, such as shipping methods, payment types, and customer price groups.

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 WooCommerce Stores defined, one B2C, the other B2B, they would be setup as two Sales Channels in CSM. Or, for example, if you use Amazon Marketplace and you utilize both the FBA (Fulfilled by Amazon) model and the FBM (Fulfilled by Merchant) model, each one of those are considered different Sales Channels in CSM.

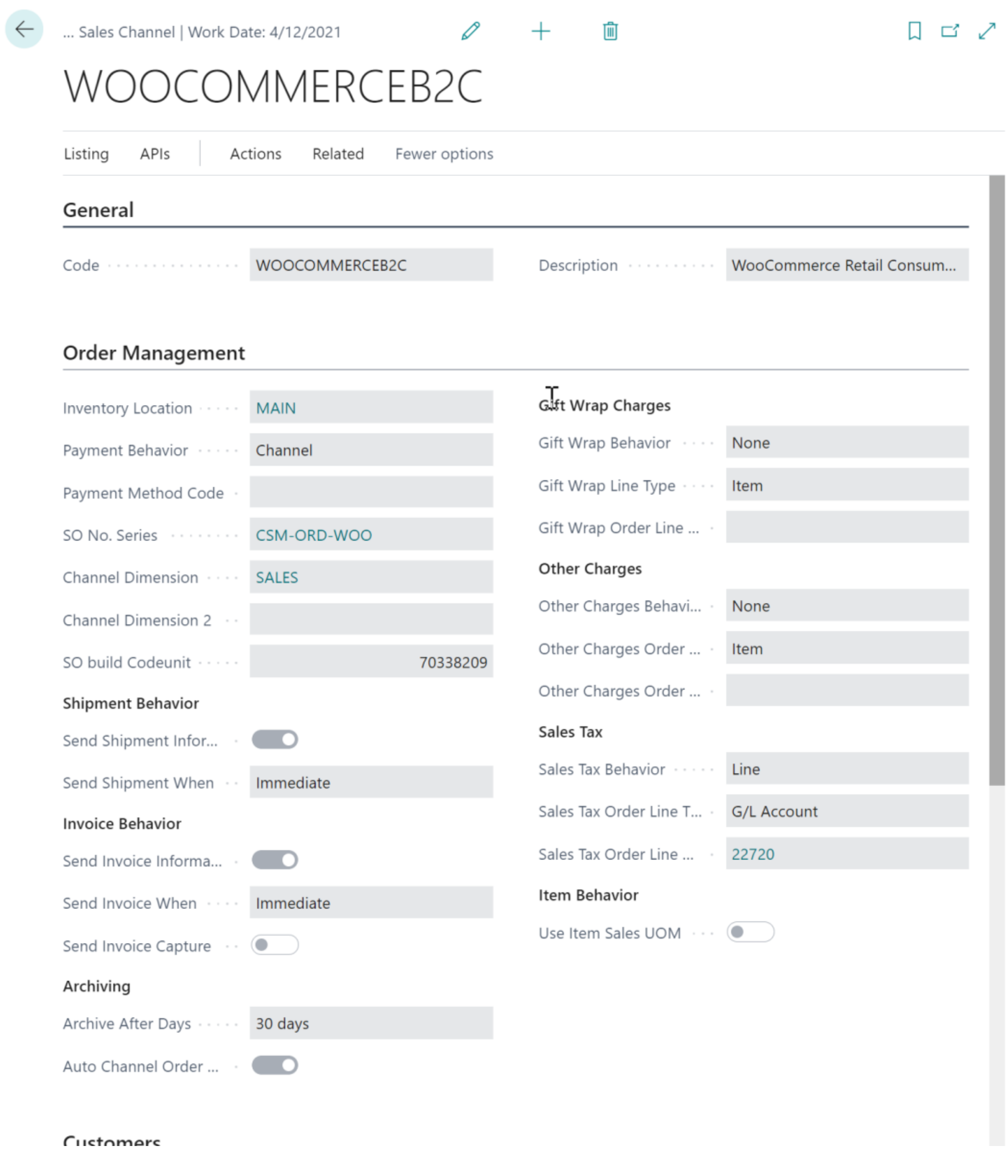
If you used the WooCommerce Quick Setup Wizard, your first Sales Channel should have been set up by that process. Let's see how you can tailor your experience with that Sales Channel or create a new one.

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.	WOOCOMMERCEB2C
Description	This is a text description of the Sales Channel.	WooCommerce Retail Store (B2C)

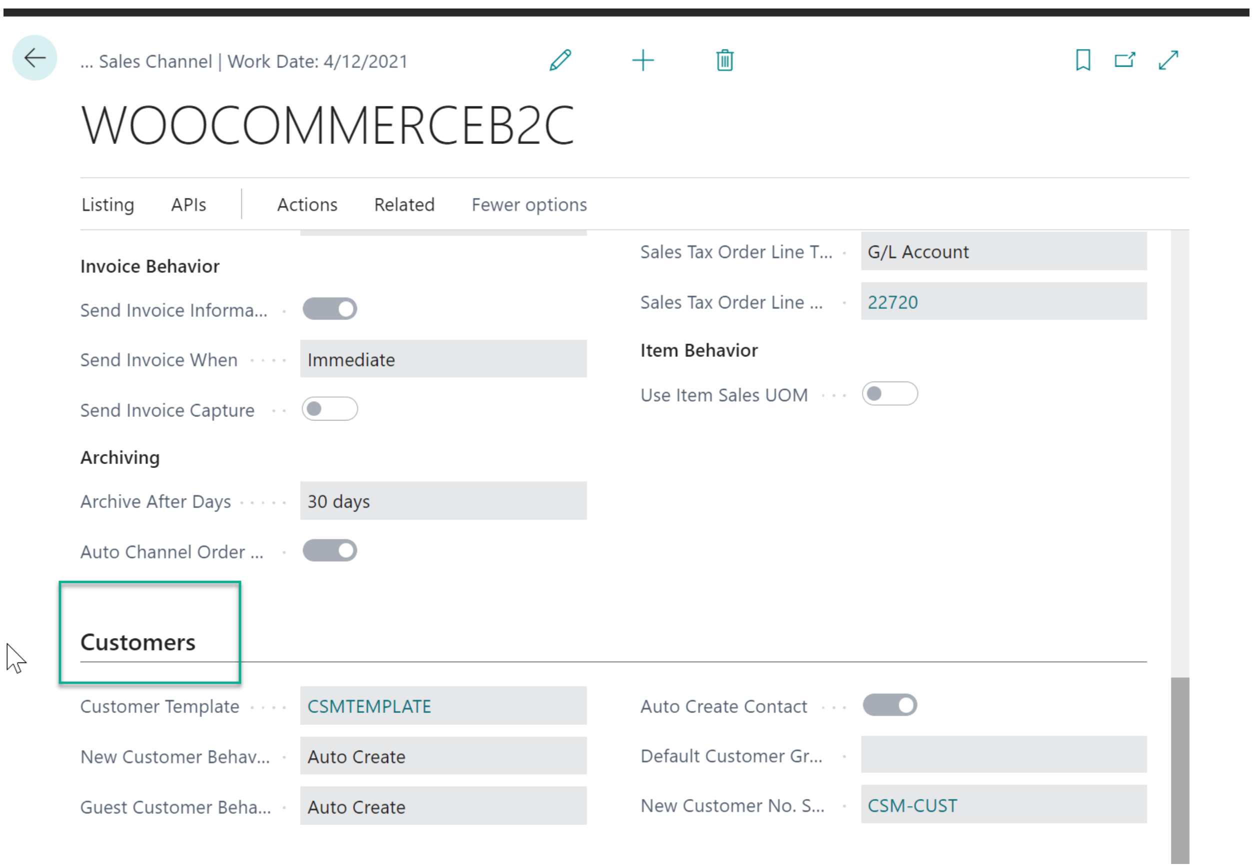
Order Management Fast Tab		
Field	**Description**	**Example Value**

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 build NAV Sales Orders for this Sales Channel.	CSM-ORD-WOO
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.	
CSM Shop Timezone UTC Offset	Enter a value in this field to specify the store's configured time zone as it relates to Coordinated Universal Time (UTC). If the store uses UTC as its time zone (recommended), this field can be left blank. If the store has a time zone other than UTC, indicate the number of hours ahead or behind. For example: a store that is 5 hours behind UTC would have an offset value of *-5h*. For more information on how WooCommerce uses time zones when retrieving sales channel orders, see here.	
Payment Behavior	Indicates how this sales channel processes payments. **For WooCommerce Sales Channels, this should be set to Payments**.	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 WooCommerce, this is dependent by payment method. If your payment method Behavior is set to payments (which it should be for WooCommerce implementations), CSM uses the Send Invoice Capture value set for each Payment Method (See setting up Channel Payment Methods later in this document).	True
Return Order Behavior fields	The **Send Return Order Information** and **Send Return Order When** fields exist to support return functionality that has not yet been developed for WooCommerce, and these fields can be ignored for your WooCommerce channels.	N/A
Return Receipt Behavior fields	The **Send Return Rcpt. Information** and **Send Return Rcpt. Information When** fields exist to support return functionality that has not yet been developed for WooCommerce, and these fields can be ignored for your WooCommerce channels.	N/A
Refund Cr. Memo Behavior fields	The **Send Refund Cr. Memo** and **Send Refund Cr. Memo When** fields exist to support return functionality that has not yet been developed for WooCommerce, and these fields can be ignored for your WooCommerce channels.	N/A
Deny Unbalanced Auto Release	It is possible to configure the channel order retrieval automation routine to automatically create and release an associated Business Central sales order as part of the retrieval activity. If this option is enabled, it will override the automation routine's setup if the channel order and sales order have different order total values. CSM will still generate the sales order, but it will not be released. ***Note:*** *this field has been superseded by CSM's sales operation rules feature and will be removed as part of a later release. If you want to enforce this process, it is recommended you use the sales operation rules feature, instead.*	
Deny Unbalanced Auto Post	It is possible to configure the channel order retrieval automation routine to automatically create and post an associated Business Central sales order as part of the retrieval activity. If this option is enabled, it will override the automation routine's setup if the channel order and sales order have different order total values. CSM will still generate the sales order, but it will not be posted. ***Note:*** *this field has been superseded by CSM's sales operation rules feature and will be removed as part of a later release. If you want to enforce this process, it is recommended you use the sales operation rules feature, instead.*	
Address 2 Behavior	Select the method by which address 2 values on Business Central sales orders and customers that are created by CSM are populated. By default, Business Central allows for the definition of address and address 2 values for sales orders and customers. However the CSM orders from which these records are created can retrieve address, address 2, and address 3 values. This is to accommodate eCommerce platforms that allows for three	

	address lines. Due to this discrepancy, it is necessary to indicate how CSM should populate Business Central address 2 fields with retrieved channel data. Options are: • *Combine CSM Address 2 and 3:* CSM will combine a CSM order's address 2 and address 3 values, then assign this combined value as the address 2 for Business Central sales orders and customers. • *Use CSM Order Address 2:* CSM will assign a CSM order's address 2 value as the address 2 for Business Central sales orders and customers. • *Use CSM Order Address 3:* CSM will assign a CSM order's address 3 value as the address 2 for Business Central sales orders and customers.	
Archive After Days	Enter the number of days to retain completed and cancelled CSM Channel Orders before they are moved to the archive. (Example: 2D would keep CSM Channel Orders in the current list for 2 days after being closed or cancelled.	
Auto Channel Order Archive	Use this field to enable and disable automatic archiving for Channel Orders for this Channel.	
Gift Wrap	Gift wrapping is not supported by CSM at the moment. What you could do if interested, is to get the 'Gift Wrapper from WooCommerce' on the WooCommerce website. *"With Gift Wrapper for WooCommerce, shoppers can add gift wrap to individual products right from the product page, or gift wrap their entire order from the cart or checkout page. They can also enter a personalized message, and store owners can choose whether to charge a fee for gift wrapping"* Gift Wrapper for WooCommerce - WooCommerce	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 CSM creates the NAV Sales Order for a WooCommerce Order, a Sales Order Line will be added to account for Other Charges.	Line
Other Charges Line Type	If you choose Line as the Other Charges Behavior, this field specifies the Sales Order Line Type which should be used for the Other Charges (Revenue from the Customer). The values can be G/L Account, Item, Resource, or Charge (Item).	G/L Account
Other Charges Order Line No.	If you choose Line as the Other Charges Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Other Charges Line Type chosen).	45120
Sales Tax Behavior	Should be 'Line' for WooCommerce. 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, NAV will calculate the Sales Tax regardless of	Line

	what WooCommerce calculated and collected. If you select Line, then when CSM creates the BC Sales Order for a WooCommerce 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 WooCommerce calculated and collected.	
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	CSMTEMPLATE

	create the Sales Order with this customer and adjust the ship to address to the actual customers information.	
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 WooCommerce, if the customer creates a new WooCommerce account when checking out, or for existing WooCommerce customers that have not been defined to CSM (either by setting up the customer as a Sales Channel Customer, or receiving a WooCommerce Order for the customer), CSM considers them a new 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 Customer Template defined above, 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 Customer Template customer defined above and change the billing and ship-to addresses directly on the Sales Order appropriately. If the behavior is set to Manual, CSM will not automatically create a customer, and the Sales Order build process will fail unless a Channel Customer is manually setup and linked to a valid NAV customer.	Auto Create
Guest Customer Behavior	Indicates how CSM will treat customers for what CSM determines is a guest customer. Valid Choices are: Auto Create, Sales Channel, and Manual. For WooCommerce, 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 Customer Template defined above, 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 Customer Template customer defined above and change the billing and ship-to addresses directly on the Sales Order appropriately. If the behavior is set to Manual, CSM will not automatically create a customer, and the Sales Order build process will fail unless a Channel Customer is manually setup and linked to a valid BC customer.	Auto Create
Auto Create NAV Contact	Indicates whether CSM will also automatically create a BC contact for any new customers CSM creates.	Yes
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	

Credentialing Sales Channel	Enter the sales channel whose API credential settings will be used for API activities. If this value is left blank, the channel's assigned credentials will be used for its own API calls. For more information on credentialing, see here.	
Website ID	For WooCommerce, this will be the WooCommerce ID of the Website.	1
Website ID is https	Place a checkmark in this field if the Website ID field is preceded by "https://" or uncheck it if preceded by "http://". Default is checked.	
API Set Code	Identifies the API Set code that should be used for API communication with WooCommerce. This should be the value that you used to setup the WooCommerce API Set in the CSM API Sets section earlier in this document.	WooCommerce
REST API Consumer Key / REST API Consumer Secret	For API calls where the URL is store specific, it is necessary for you to generate a REST API key for the store in your WooCommerce environment. Each REST API has unique consumer key and consumer secret values, which can be assigned to the sales channel in Business Central. For information on how to set up a REST API in WooCommerce and then obtain the necessary credentials, see here.	

CSM Shipping Methods

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

CSM shipping methods correspond to "shipping method" records in WooCommerce. WooCommerce uses this record type to represent generic delivery scenarios such as standard shipping and flat rate shipping. While it is possible for users to add shipping methods from WooCommerce's list of default options, it is not possible to set up new shipping method records in addition to these defaults.

It is recommended that you use CSM shipping methods to link your Business Central shipping agent codes and your WooCommerce shipping methods. When shipping information is sent between your Business Central and WooCommerce environments, this association will ensure that the proper order information is maintained in both platforms. You can instruct CSM to retrieve shipping method records from WooCommerce 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 import shipping methods.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Shipping Methods** action.
4. In the **CSM Shipping Methods** window, choose the **Actions** ribbon, then choose the **Retrieve Shipping Methods** action.

CSM retrieves shipping method records from the sales channel's connected WooCommerce 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: *a change was introduced in release 2.0 of CSM for WooCommerce that changes the channel order field to which shipping methods are mapped. If you have upgraded your CSM for WooCommerce application to version 2.0 or higher, you must manually change this mapping in the API function LIST_ORDERS_AFTER. Locate the existing mapping to table 70338221, field 200 (Ship Service Level) and update this field number to 205 (Channel Shipping Method). Repeat this process for the ORDER_GET_BYSTATUS and LIST_ORDERS_TEST functions.*

CSM Payment Methods

Most eCommerce platforms contain some sort of way to identify the manner by which customers can pay for orders. The terminology for these records varies from platform to platform, but within CSM these categorizations are referred to as "CSM payment methods." CSM payment methods are set up to correspond to existing Business Central payment method codes.

CSM payment methods correspond to "payment method" records in WooCommerce. WooCommerce uses this record type to represent all payment scenarios, including generic ones such as credit cards, bank accounts, and checks, as well as specific payment processes, such as Stripe and PayPal. Although extensions exist to add payment methods beyond these provided defaults, it is not possible for WooCommerce users to manually set up new records.

It is recommended that you use CSM payment methods to link your Business Central payment method codes and your WooCommerce payment methods. When payment information is sent between your Business Central and WooCommerce environments, this association will ensure that the proper payment information is maintained in both platforms. You can instruct CSM to retrieve payment methods from WooCommerce 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 import 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 **Actions** ribbon, then choose the **Retrieve Payment Methods** action.

CSM retrieves shipping method records from the sales channel's connected WooCommerce store and creates new CSM shipping method records for each one.

5. In the **Payment Method Code** field, use the AssistButton to assign a Business Central payment method code to the payment method.

6. To provide additional instructions as to how CSM should process orders to which a given payment method is assigned, fill in the fields as follows:
    - **Automatic Application:** enter a check mark in this field to instruct CSM to automatically apply payments that are recorded for the payment method to the associated Business Central sales invoice or credit memo.
    - **Single Capture:** enter a check mark in this field to instruct CSM to permit only a single payment capture activity against this payment method.
    - **Perform Invoice Capture:** enter a check mark in this field to instruct CSM to automatically perform and send a capture transaction (such as a credit card settlement) to the external channel following the transmission of invoice activities recorded for the payment method.
    - **Perform Capture for Zero Amt:** enter a check mark in this field to instruct CSM to automatically perform and send a capture transaction to the external channel following the transmission of invoice activity when an invoice amount is zero recorded for the payment method.

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.

WooCommerce does not maintain shipping carrier information in its out-of-the-box offering. There are, however, plug-ins that can be installed within your WooCommerce environment to record this information.

By default, CSM does not support WooCommerce plugins. In the event that you have installed a plugin, CSM contains functionality that will create CSM shipping carrier records based on your existing Business Central shipping agent codes:

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 create CSM shipping carriers.
3. Choose the **Related** ribbon, then select the **Setup Actions** menu and choose the **Load Shipping Carriers** action.

You can review the newly-created records by choosing the **Related** ribbon, selecting the **Setup** menu and then choosing the **Shipping Carriers** action. CSM has created a separate record for each shipping agent code that exists in Business Central. You can map these lines to corresponding records in WooCommerce by entering the relevant identification values from WooCommerce in the **External ID** field.

> ***Note:*** *CSM does not support WooCommerce plugins. If you have installed a plugin that allows for the creation of shipping carrier records on your WooCommerce platform, you may need to make changes or customizations to your CSM solution in order to ensure the integration operates as desired.*

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 WooCommerce. This data is pre-loaded. Please change these status values carefully to ensure CSM integrity when assigning a status to a Channel Order.

Channel Sales Order Automation Time Zone Handling

The CSM app periodically retrieves orders from the CSM sales channel by running the Order Automation. CSM sends a date parameter in the request which Business Central uses to find orders created after the date sent.

In cases where the time zone setting on the demo site is different from the time zone in Business Central, there could be a discrepancy between the times. To account for this, a field has been added to the CSM Sales Channel where the user can enter the time difference between the demo store time zone and UTC (Coordinated Universal Time).

CSM uses the last execution timestamp for the LIST_ORDERS_AFTER API Function to instruct WooCommerce which orders to retrieve. This date is set in CSM using the Business Central/local time. What WooCommerce needs is the date/time in its own time zone. It will not accept a date in UTC, which standard CSM can do.

CSM for WooCommerce has been customized to determine the date to send by converting the last execution timestamp first to UTC and then into the store time zone, using the store's defined shop timezone UTC offset value.

For example, a WooCommerce store uses Central Daylight Time (CDT). A customer places an order at 10:30 AM store time.

A Business Central user is accessing the ERP environment in Eastern Standard Time (EST) – (UTC-4), which is one hour ahead of store time. The order placed at 10:30 AM store time would be recorded at 11:30 AM local/Business Central time.

The UTC time that corresponds to 10:30 CDT / 11:30 EST is 3:30 pm UTC.

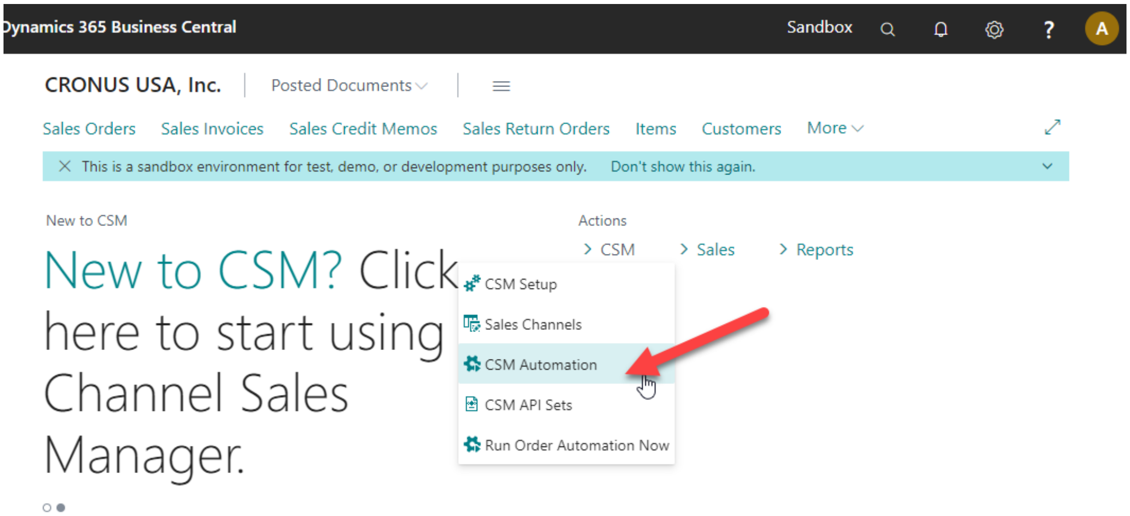
To define a sales channels UTC offset:

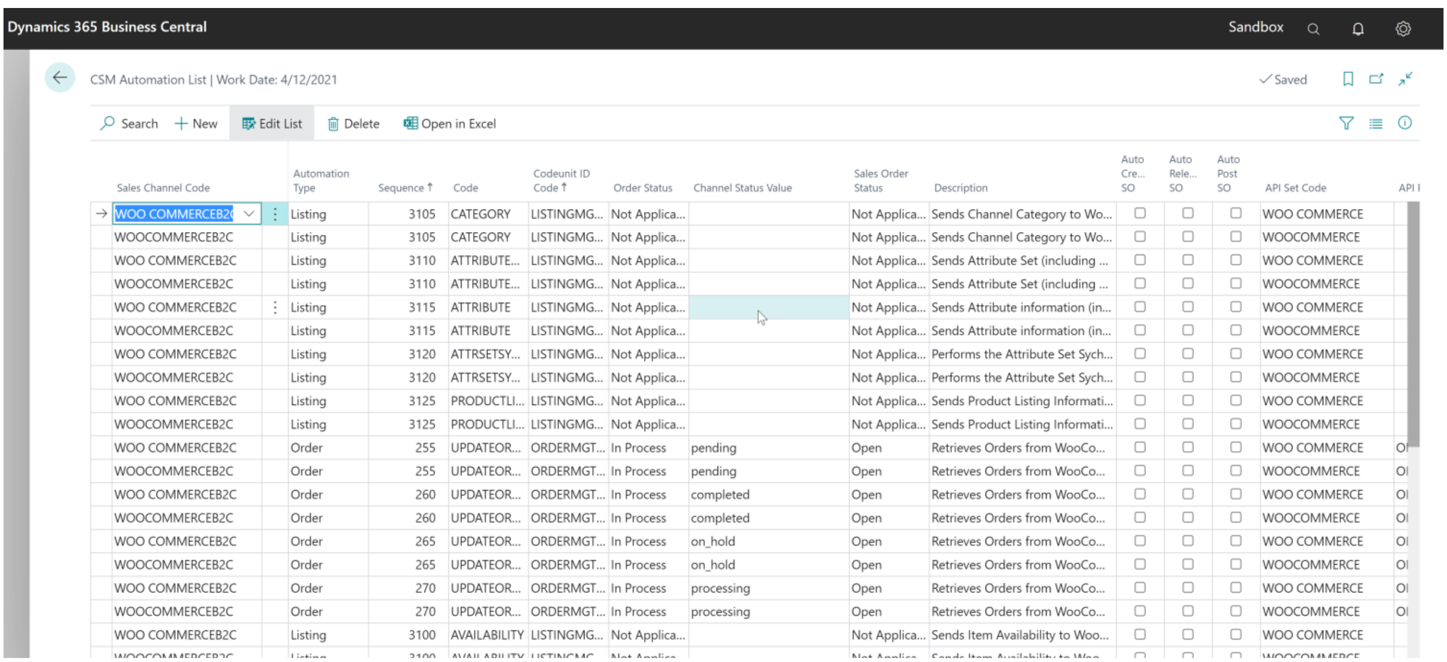
1. Choose the icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the CSM sales channel record for which you want to define a UTC time zone offset.
3. On the **Order Management** FastTab, enter the appropriate timezone offset in the **CSM Shop Timezone UTC Offset** field.

   Keep in mind that the characters allowed in this **CSM Shop Timezone UTC Offset** field are the following: whole numeric digits. The time entered must not contain special characters. The time is automatically converted into hours. For example, if you enter *1*, the time will populate and display *1 hour*.

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.





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

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

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

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

The order in which automation routine are executed is determined by their assigned sequence values.

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, both the Amazon and WooCommerce 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:

WooCommerce does not provide a way to retrieve orders by the date they were modified. CSM uses two separate APIs to get and update orders. LIST_ORDERS_AFTER will get orders CREATED after the last run date/time. ORDER_GET_BYSTATUS will periodically retrieve all existing orders that are not Complete or Cancelled.

Here is a field by field listing of the values necessary for the Automation:

Automation Task – Retrieve WooCommerce Orders		
Field	Description	Example Value
Sales Channel	This should be blank for WooCommerce. CSM uses the API Set to download all WooCommerce 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.	WOOCOMMERCEORDER LIST
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues.	ORDERMGTDEFAULT
Order Status	This value is Not Applicable for the API Sales Order List.	Not Applicable

Automation Task – Retrieve WooCommerce Orders		
Channel Status Value	This value is Not Applicable for the API Sales Order List.	
NAV Order Status	This value is Not Applicable for the API Sales Order List.	
Description	A description of the entry.	Retrieves Orders from WooCommerce
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 WooCommerce API Set to use when executing the Task	WOOCOMMERCE
API Function Code	The API Function Code to Use when executing the Task. This will almost always be SALESORDERLIST for WooCommerce.9 API Sets.	SALESORDERLIST
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

Configuring Job Queue Entries

While the process of manually running CSM's automation routines is useful in testing or troubleshooting scenarios, it is not the intended way in which the application should be used. Once you have tested CSM and validated that the automation routines work as desired, you can schedule them to occur on a recurring basis by using standard Business Central job queue functionality. CSM includes the following codeunits that can be assigned to job queue entries:

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

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

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

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

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

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

To create a job queue entry for order management automation:

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

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

CSM Sales Operation Rules

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

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

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

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

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

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

To load the default rules that are included with CSM:

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

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

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

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

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

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

CSM Sales Operation Rule Functions

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

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

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

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

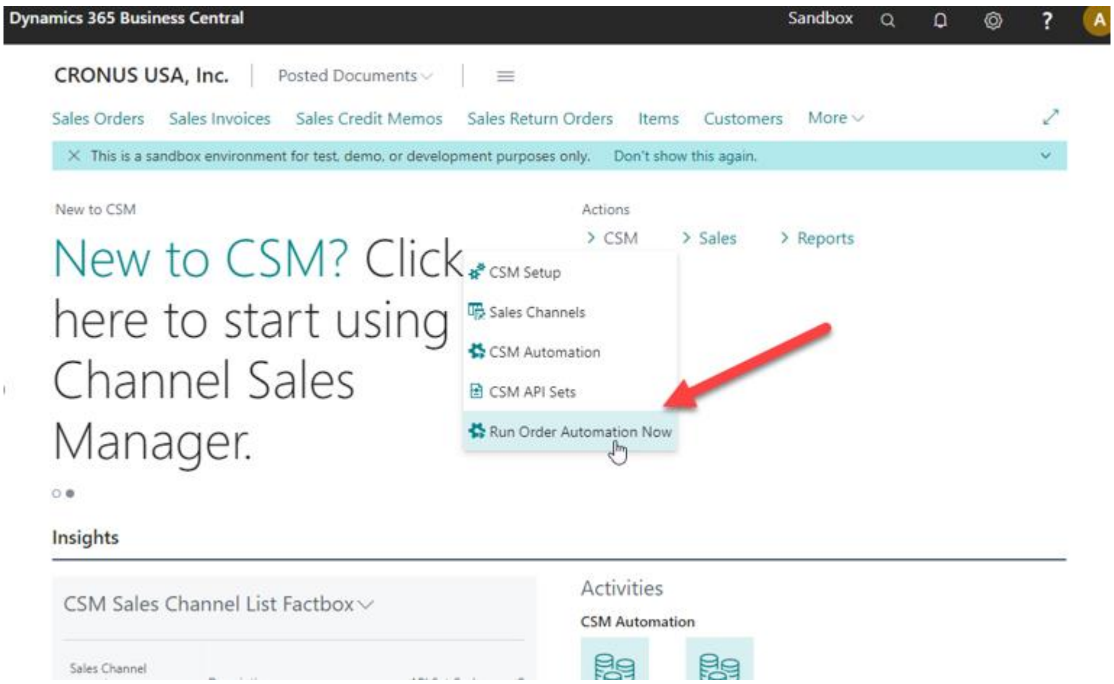
CSM Everyday Operations

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

Running the Automation Manually

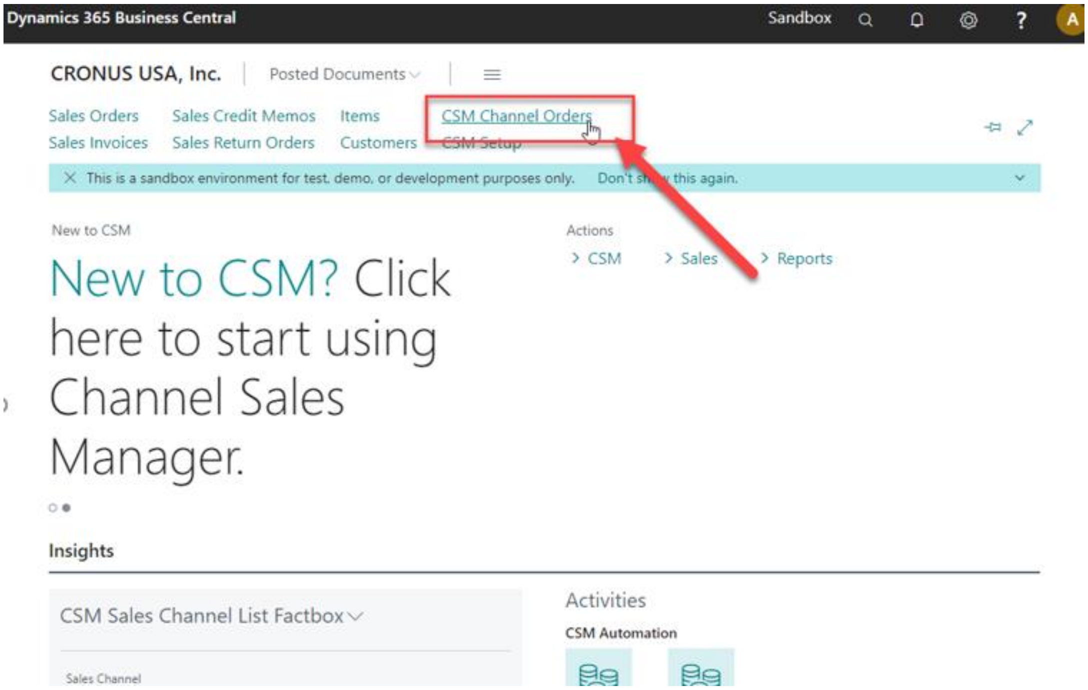
Typically, your automation routines will run automatically according to scheduled job queue entries. However, if you need to run the automation manually (such as for testing or troubleshooting), you can do so from the CSM Administrator Role Center.

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

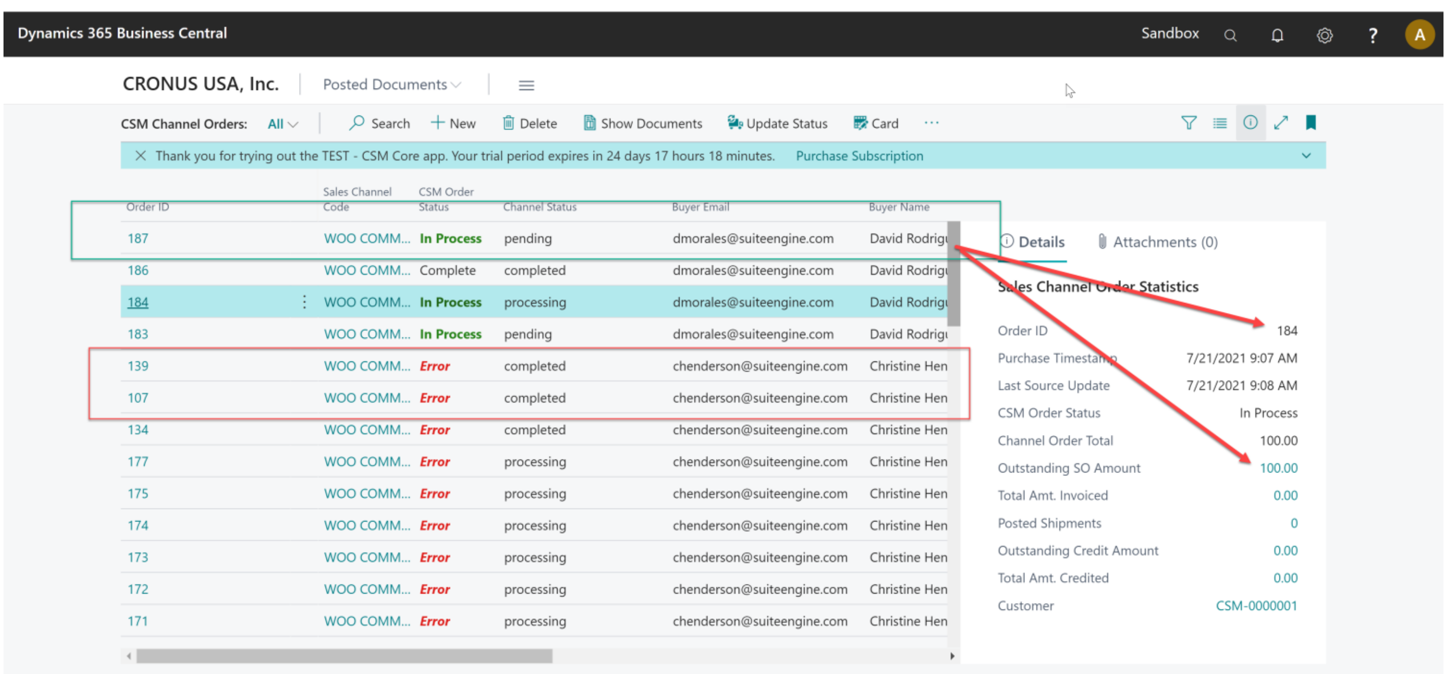


Viewing Channel Orders

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 WooCommerce regarding an order with some additional information as to the CSM status and links to other Business Central Information.



In the list above, we see 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. In the above Channel Order List example, WooCommerce Order 186 has a WooCommerce Status of Complete (which implies that it has been shipped and invoiced) however no record of a shipment / invoice for that order can be found in Business Central.

Order 187 is a current (highlighted) row, so the Sales Channel Order Statistics Factbox shows information for that order. In that Factbox we can see that the Order Total received from WooCommerce was $100. We can also see that there is an Outstanding Business Central Sales Order that totals $100 as well.

Updating Channel Orders

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

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:

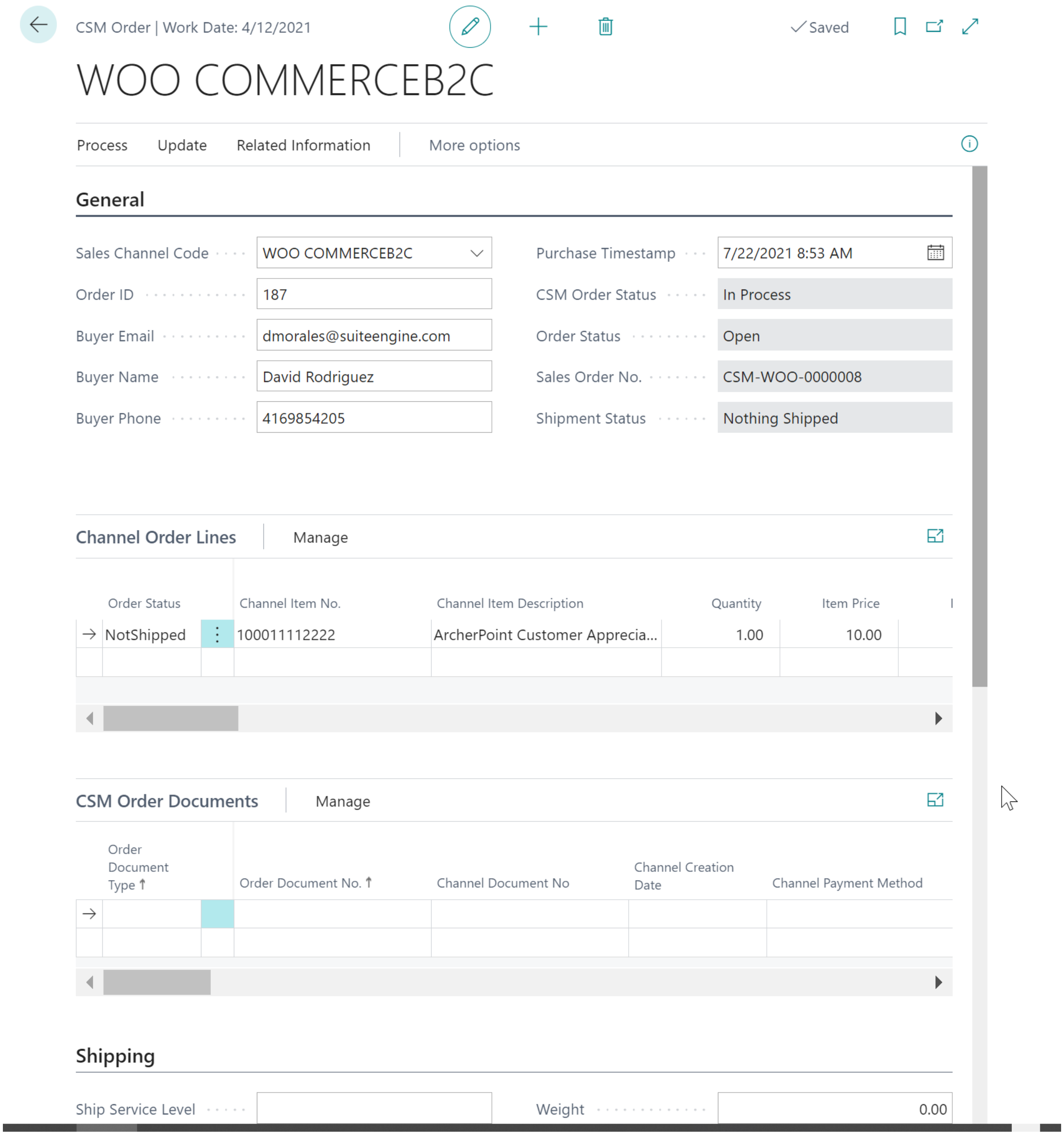
- Have an associated sales order in Business Central and
- Have a CSM Order Status value that is not Complete.

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.

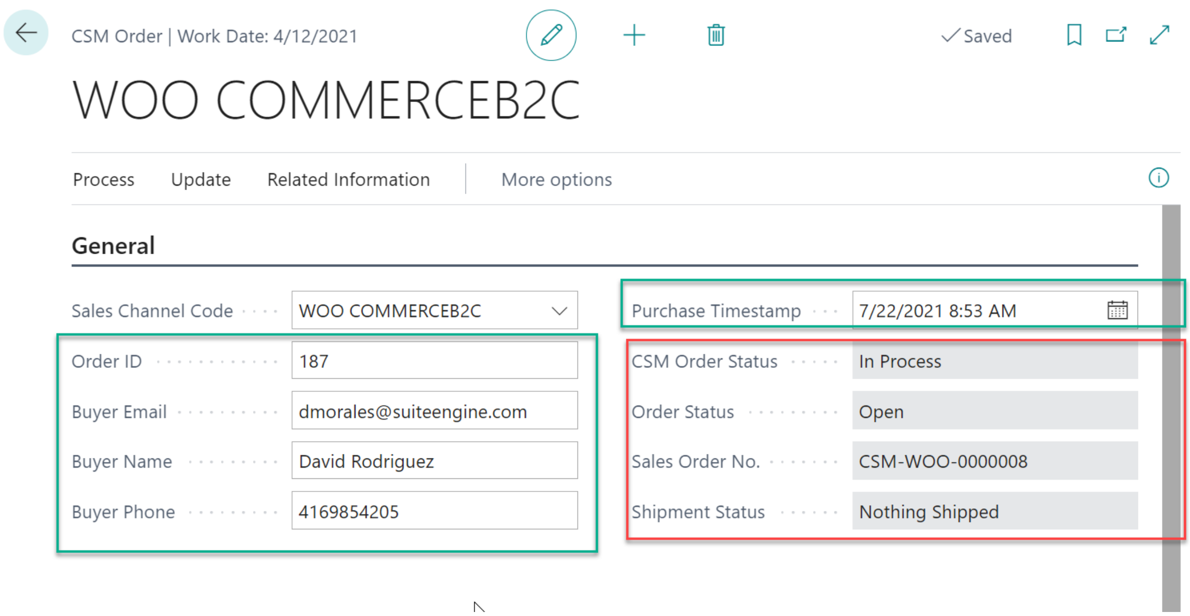
Channel Order Card

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



General FastTab

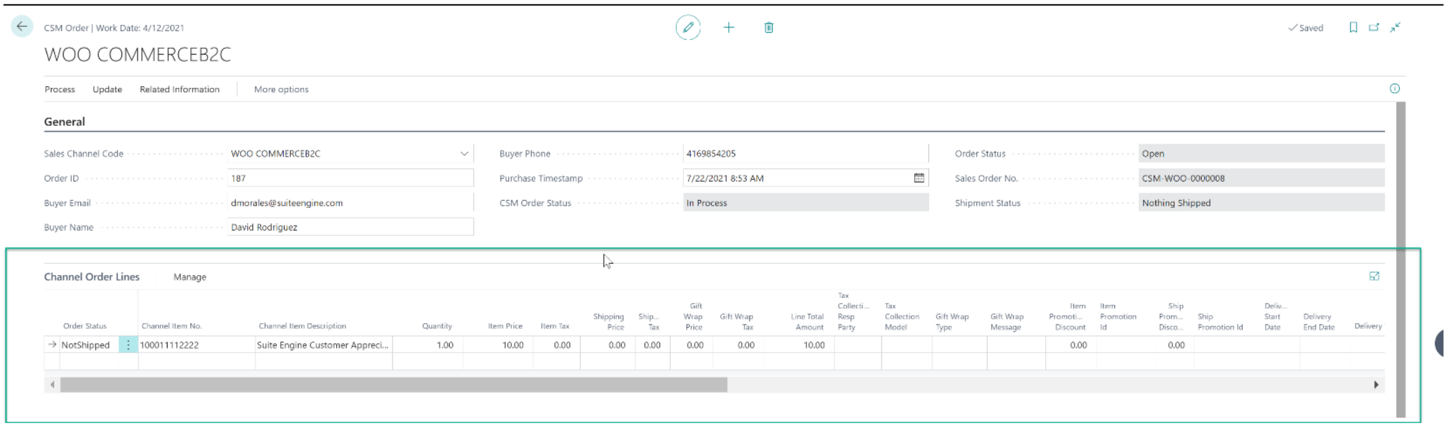
In the General Fast tab of the Channel Order Card, the fields below bordered in green are values from WooCommerce, the fields bordered in red are fields that CSM uses to keep track of status.



- **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.
- **No Order –** No Business Central Sales Documents were found for this Channel Order.
- **Open** – A Business Central Sales Order Exists with a status of Open.
- **Released** – A Business Central Sales Order Exists with a status of Released.
- **Partial** – A Business Central Sales Order Exists and some of the items on the order have shipped.
- **Pending Approval** – A Business Central Sales Order Exists with a status of Pending Approval.
- **Pending Prepayment** – A Business Central Sales Order Exists with a status of Pending Prepayment.
- **Shipped** – Posted Shipments exist that have completed the order.
- **Order No.** If the 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.



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

Order Line Options

You can view additional information about a channel order line by choosing the **Manage** ribbon in the **Channel Order Lines** FastTab and then choosing the **Order Line Options** action. The **CSM Order Line Options** page presents detailed sales tax information and other info as supplied by WooCommerce relating to a particular item.

Order Level Tax on Shipping amounts is also saved in Order Line Options but is not linked to a specific line item. These are not visible at this time but may be in the future and are relevant for CSM Sales Order correct creation of orders.

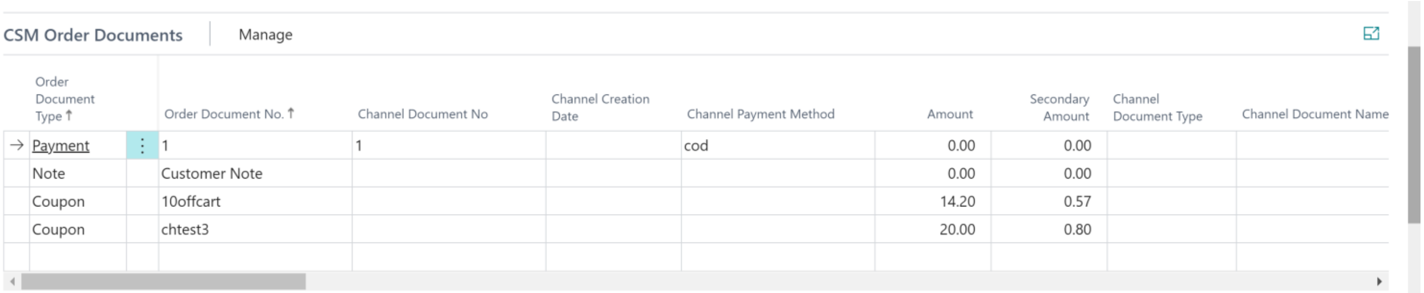
So how does CSM create a Sales Order with a Channel Item No. that could potentially be different than how an Item is defined in CSM?

- 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 Reference / Item Cross Reference (the exact record type is version-dependent, as Business Central item cross reference functionality was replaced by item references in Business Central version 19) 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 WooCommerce. 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

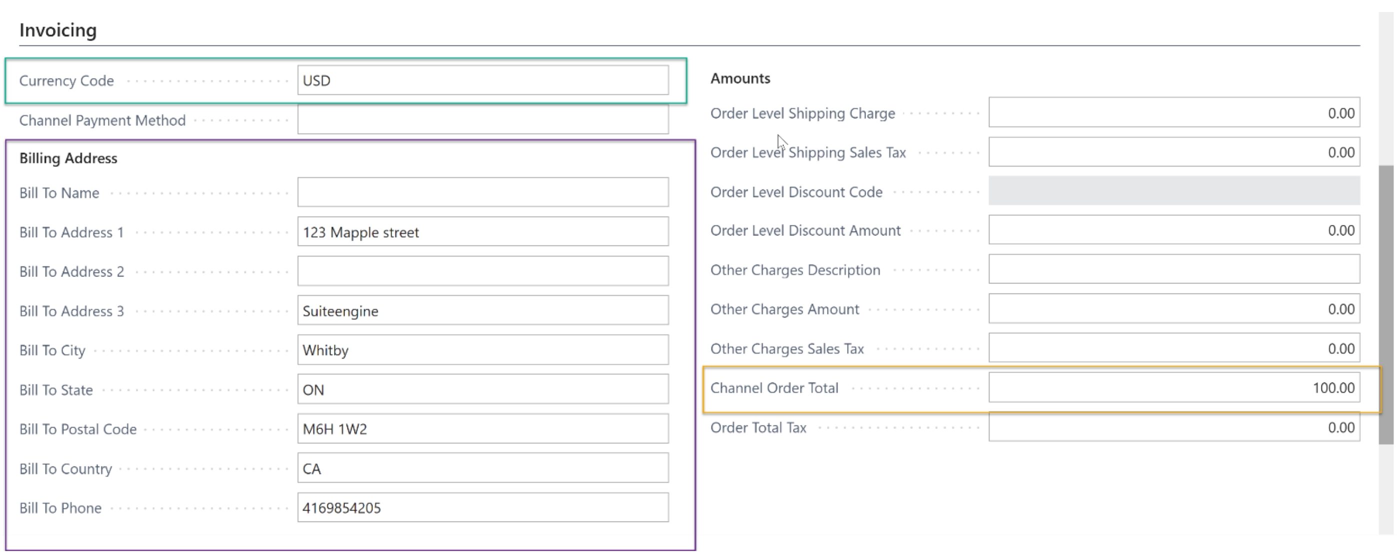
The Shipping FastTab presents channel order shipping information that was retrieved from WooCommerce.

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

The Ship To Address information in this 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 WooCommerce.



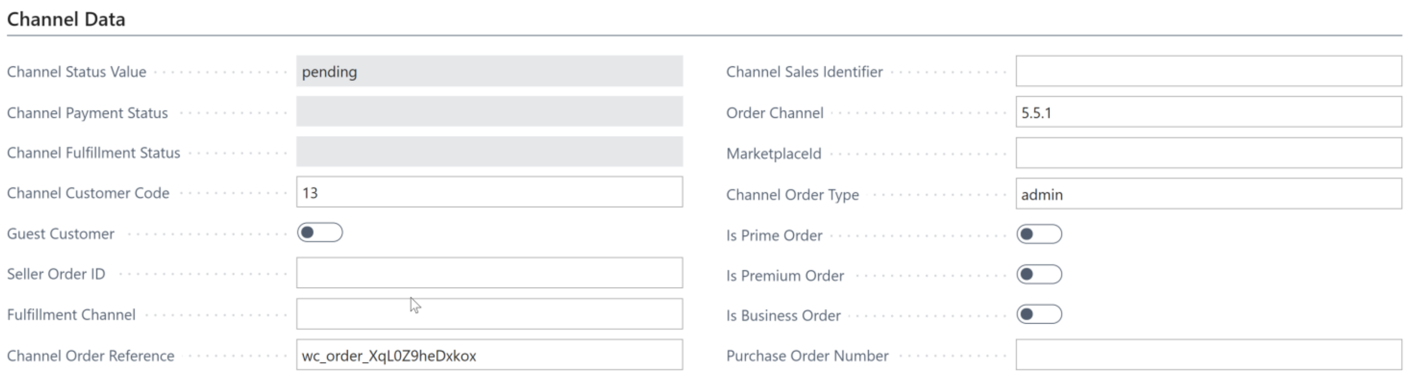
The invoicing information received from WooCommerce includes the Order Bill To address information. This is used to build the sales order as well as create a Business Central Customer (if the Sales Channel Setup specifies Auto Create for its new Customer behavior).

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

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

Channel Data Fast Tab

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



- Channel Status Value – The status of the Order as received from WooCommerce.
- Channel Customer Code – The WooCommerce 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 WooCommerce 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 WooCommerce store.
- Seller Order ID – The Order ID (Not Order Number) that WooCommerce assigns to the order.
- Channel Sales Identifier – This is the WooCommerce 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 WooCommerce Order occurred in.
- Marketplace ID – This contains the WooCommerce Website ID that the order was placed on.

The rest of the fields in this fast tab are used by other Channels (Amazon Marketplace) and should be blank for Channel Orders from WooCommerce.

Refund Information Fast Tab

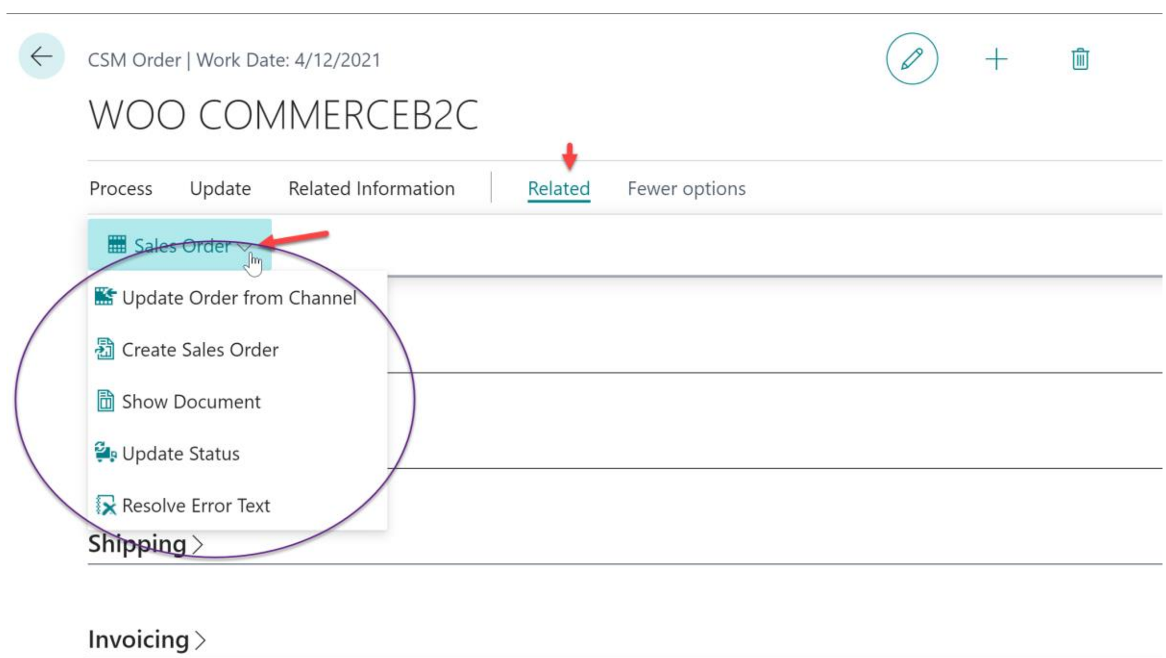
Currently not supported by WooCommerce.

Information Fast Tab

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.



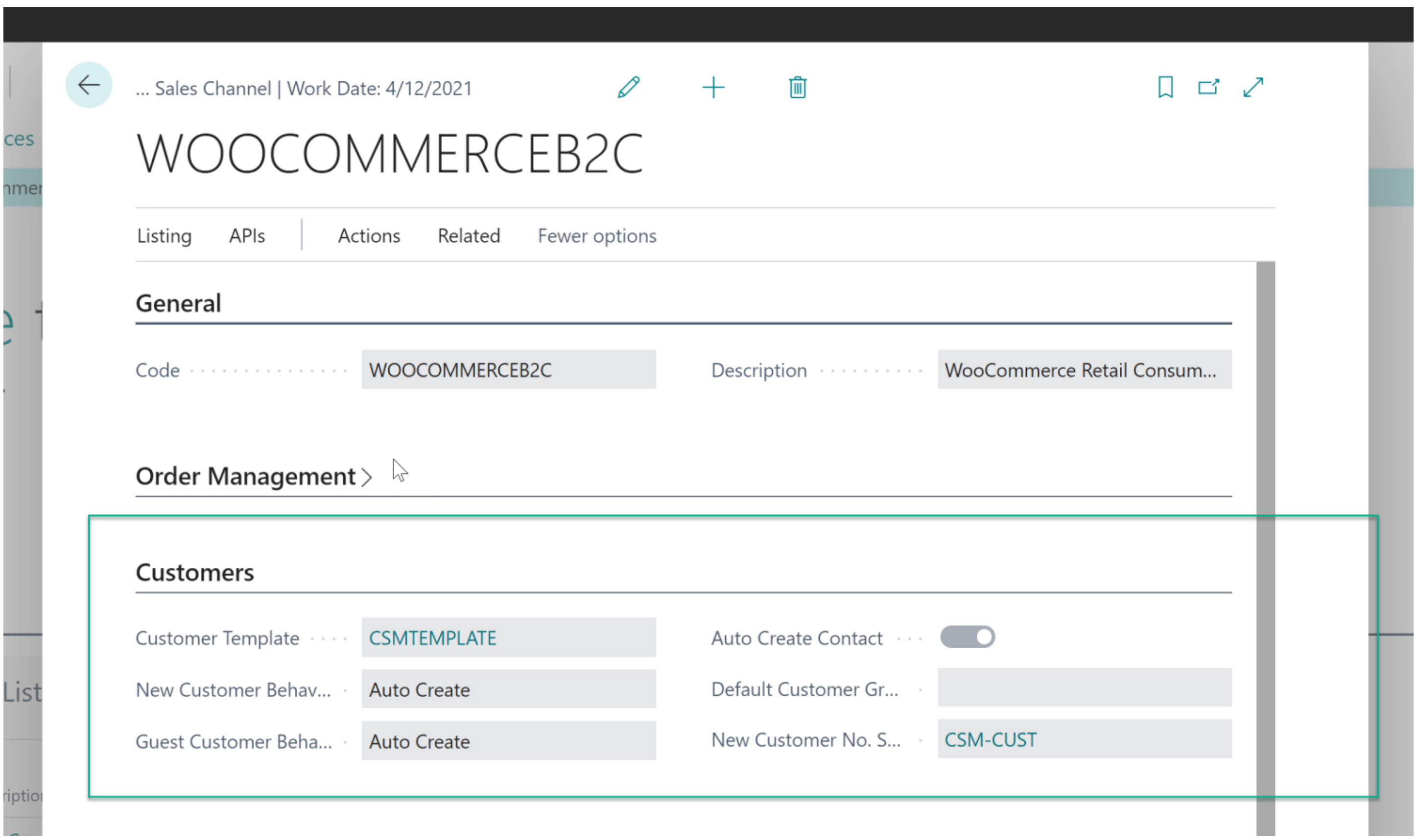
- Update Order from Channel – This Action will communicate with WooCommerce to update the order and its lines.
- Create Sales Order – This action will attempt to use the data retrieved from WooCommerce to create a Business Central Sales Order. Note that if CSM cannot perform this because of an error, 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.

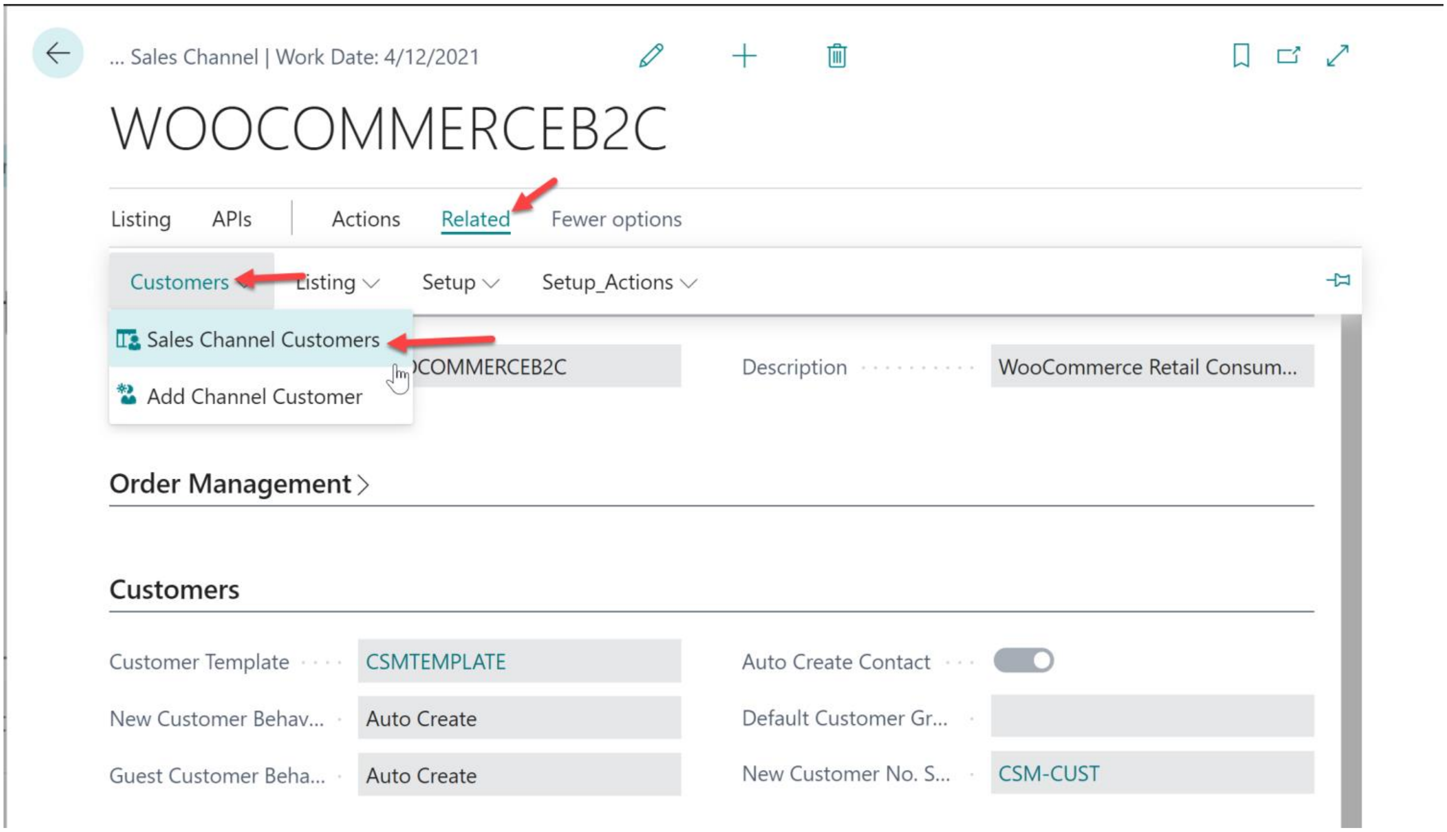
- Show Document – CSM will Navigate to Business Central Sales Documents. If a Sales Order still exists in the system, that Sales Order Document will be navigated to. If a sales order is not found, then CSM will display the related Posted Sales Invoice(s).
- Update Status – CSM will reevaluate the Status of the Order.

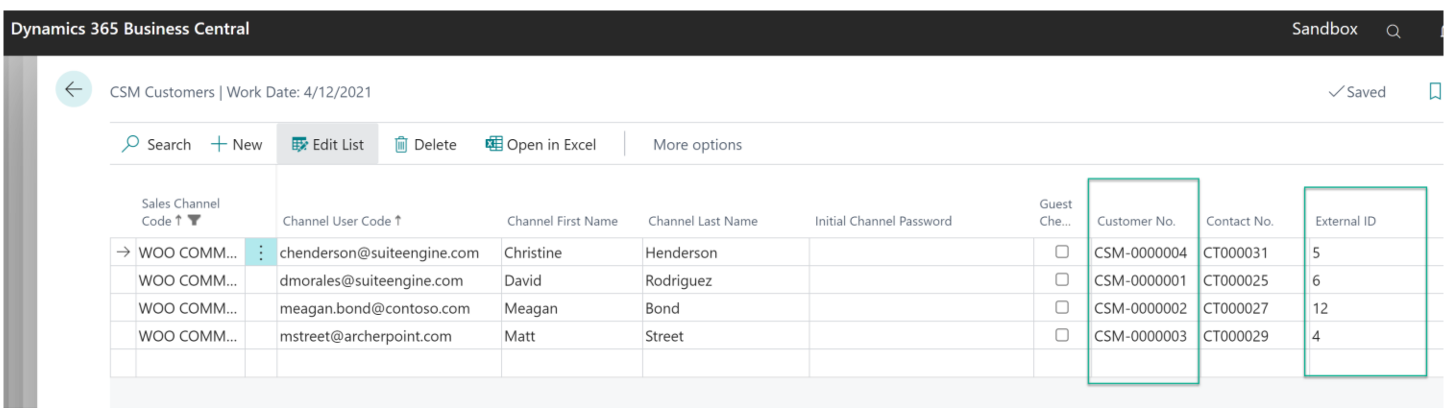
Sales Channel Customers

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



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





Sales Channel Code	Channel User Code	Channel First Name	Channel Last Name	Initial Channel Password	Guest Che...	Customer No.	Contact No.	External ID
WOO COMM...	chenderson@suiteengine.com	Christine	Henderson		☐	CSM-0000004	CT000031	5
WOO COMM...	dmorales@suiteengine.com	David	Rodriguez		☐	CSM-0000001	CT000025	6
WOO COMM...	meagan.bond@contoso.com	Meagan	Bond		☐	CSM-0000002	CT000027	12
WOO COMM...	mstreet@archerpoint.com	Matt	Street		☐	CSM-0000003	CT000029	4

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 WooCommerce 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 WooCommerce sent for the order.

Sending Customers from Business Central to WooCommerce

You can also send customer information to WooCommerce from Business Central. There are multiple ways in which you can perform this action:

Send Customers from the CSM Sales Channel

1. Choose the icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the sales channel record from which you want to send customer information.
3. Choose the **Related** ribbon, then choose the **Add Channel Customer** action in the **Customers** group.
4. On the sales channel customer wizard, enter or use the AssistButton in the **Customer No.** field to select the customer you want to send.
5. Optionally, you can enter or use the AssistButton in the **Contact No.** field to use a contact as the basis for a channel customer.
6. Choose the **Next** button.
7. On the next page of the wizard, enter a unique value that will be used to identify the customer on the external sales channel. Typically the customer's e-mail address is entered here.
8. Choose the **Next** button, then choose the **Finish** button on the last page of the wizard.

CSM will send the customer/contact's name and address information to the sales channel, then build a new customer record there.

Send Customers from Customer/Contact Cards

You can also send customers to a connected channel directly from the customer card in Business Central:

1. Choose the icon, enter **Customers**, and then choose the related link.
2. Open the customer that you want to link to the external sales channel.
3. Choose the **Actions** tab in the ribbon, then choose the **Create CSM Sales Channel Customer** action. This action will not be available if the customer is linked to all CSM sales channels in your Business Central environment.

   If multiple CSM sales channels have been set up in Business Central, these will be presented to you.

4. Choose the sales channel to which you want to send the customer, then choose the **OK** button.

CSM will attempt to create a new CSM customer record for the selected sales channel, then send this customer's information to the external platform. A new customer record is created in the external platform and basic information such as the address and e-mail is copied from the CSM customer in Business Central. The external ID for this record is then retrieved back into Business Central, establishing a link between the customer records in both environments.

As part of the process of sending customer information to the external platform, CSM will perform a number of data validations to ensure that required information (such as name and e-mail) is defined for the customer and that proper customer/contact relationships exist. If these criteria are not satisfied, CSM will create a new CSM customer for the sales channel, but it will not export this information to the external environment. You can review the **Last External Update Result** field for the CSM customer for information as to why the export process failed.

You can view a list of all CSM sales channels to which a customer has been linked from the customer's card by choosing the **Related** ribbon, then choosing the **CSM Channel Customers** action.

It is also possible to send Business Central contacts to a connected channel, where they will be created as customers. The processes described above work the same way for contacts, and can be performed from the contact card.

Sending Customers from Customer/Contact Lists

You can send multiple customers from Business Central to a connected channel at once from the **Customers** list page:

1. Select all of the customers you want to link to the external sales channel.
2. Choose the **Actions** ribbon, then choose the **Mass Create CSM Sales Channel Customers** action.

   A confirmation message will ask if you want to create CSM customers for the selected customers.

3. Choose the **Yes** button.
4. Choose the sales channel to which you want to send the customers, then choose the **OK** button.

For each customer that does not have an existing link to the selected payment platform, CSM will attempt to create a new CSM customer record for the selected sales channel, then send this customer's information to the external platform. A new customer record is created in the external platform and basic information such as the address and e-mail is copied from the CSM customer in Business Central. This external ID for this record is then retrieved back into Business Central, establishing a link between the customer records in both environments.

As part of the process of sending customer information to the external platform, CSM will perform a number of data validations to ensure that required information (such as name and e-mail) is defined for the customer and that proper customer/contact relationships exist. If these criteria are not satisfied, CSM will create a new CSM customer for the sales channel, but it will not export this information to the external environment. When the process is completed for all selected customers, a message will be presented to the user specifying the number of new CSM customers that were created, as well as the number of selected customers that were not created because they already had a link to the external channel or there was insufficient data. You can review the **Last External Update Result** field for the CSM customer for information as to why the export process failed.

You can view a list of all CSM sales channels to which a customer has been linked from the **Customers** list by choosing the **Related** ribbon, then choosing the **CSM Channel Customers** action.

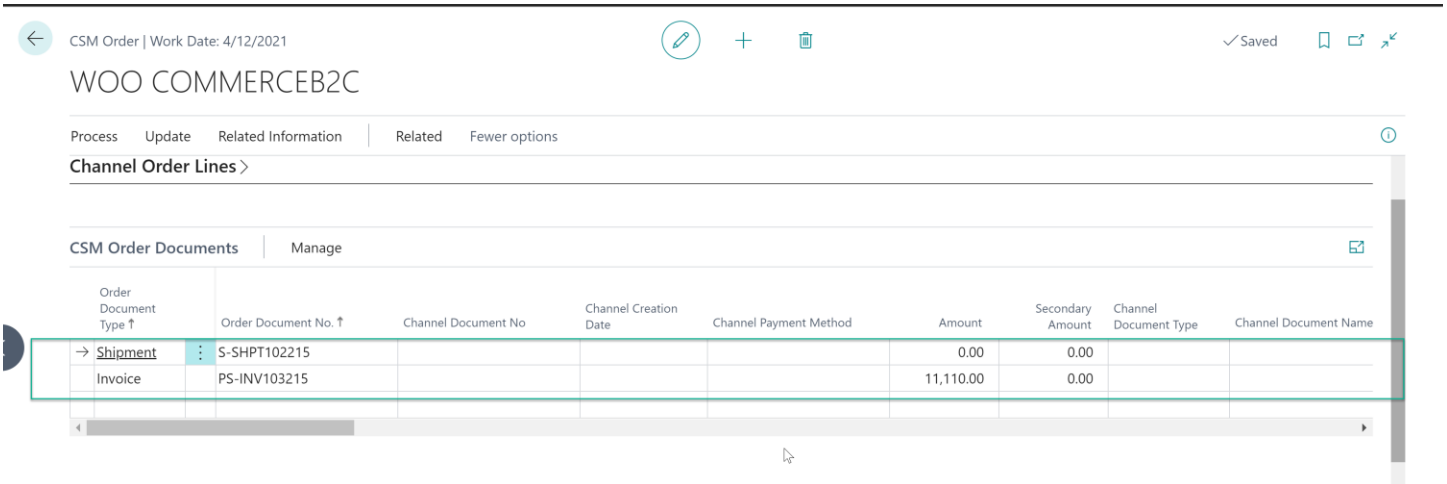
It is also possible to send multiple Business Central contacts to a connected channel, where they will be created as customers. The processes described above work the same way for contacts, and can be performed from the **Contacts** list.

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 WooCommerce.



Next, CSM will send the information to WooCommerce, and if successful, set the External ID that WooCommerce assigns to the transaction on the CSM Order Document Line.

CSM will send the tracking information to WooCommerce as an order note. This will happen as each Shipment is posted. If the CSM Order is then marked with “Shipment Status” of either “Full Single Shipment” or “Full Multiple Shipments” then CSM will also send the Status of ‘Complete’ to WooCommerce.

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.

Creating Sales Returns

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

1. Open the **CSM Channel Orders** list, then select an order for which the return will be issued.
2. Choose the **Create Sales Return Order** action in the ribbon on the **CSM Order** page.

3. CSM creates a new sales return order and updates the CSM order's sales return status to Open. You can navigate to this return directly from the CSM order by selecting the **Outstanding Return Order Amount** link in the **Sales Channel Order Statistics** FactBox.

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

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

Archiving Channel Orders

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

CSM Setup

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

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

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

Sales Channel Setup

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

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

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

Housekeeping Automation Setup

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

Channel Order Archiving

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

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

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

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

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

Viewing Archived CSM Channel Orders

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

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

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

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

Troubleshooting CSM Activities

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

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

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

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

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

Reprocessing CSM API Messages

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

To edit and reprocess an API message:

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

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

CSM Additional Details

CSM API Data

If you used the Quick setup wizard, the WooCommerce 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.	WOOCOMMERCE
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, WooCommerce 2.xx, Amazon, etc.).	WooCommerce API Data
API Set Behavior	This tells us which channel we are dealing with, choose WOOCOMMERCE.	WOOCOMMERCE
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. In our example, we have specified 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 (WOOCOMMERCE).	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. We recommend entering a value of 60,000 or above. If your WOOCOMMERCE server is under configured, it may be slow to respond, in our example, we set the value to 600000.	600,000
Host	This is the host URL endpoint for soap services on your WOOCOMMERCE server.	<websiteID>/wp-json/wc/v3
User ID	This is the WOOCOMMERCE user that CSM should authenticate its API Calls with. This user should be assigned a WOOCOMMERCE user roll that gives it access to all API's.	Use the Soap/xml-RPC User you setup on WOOCOMMERCE
API Key	This is the WOOCOMMERCE API Key which CSM authenticates API Calls with.	Use the API key you defined on WOOCOMMERCE for the User ID

Appendix A: CSM Role Center Headline Data

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

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

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

Field	Description	Value Type	Example Value
Edit List	This is the ability to edit the Role Center Headline Data within the table.	N/A	N/A
Update CSM Role Center Headlines	This will populate CSM Role Center Headline Data with default info to display in the CSM Administrator Role Center page.	N/A	N/A
Code	This is the unique value to identify this headline.	character limit- 20 all caps alphabetic and/or numeric value	NEWTOCSM
Headline Name	This is the name of the headline for user reference.	Alphabetic value first letter of the values in this cell are uppercase, while they are lowercase in others.	New to CSM Insight
Status	This is the status of the headline used to determine if it is visible.	Pending/ Active/ Active Dates/ Inactive	Active

Field	Description	Value Type	Example Value
Starting Date/Time	The starting time stamp for displaying the headline. This is only relevant if Status is Active Dates.	M/D/YYYY	5/3/2022
Ending Date/Time	The ending time stamp for displaying the headline. This is only relevant if Status is Active Dates.	M/D/YYYY	5/4/2022
Display Order	Indicates the order in which the headline will appear in the role center rotation.	character limit- 10 numeric value	10
Payload Text	This is the main text of the headline.	character limit- 75 alphabetic and/or numeric value first letter of each word is uppercase.	New to CSM? Click here to start using Channel Sales Manager
Qualifier	The title of the headline.	character limit- 50 alphabetic and/or numeric value	New to CSM
Click Action Type	This indicates what will happen when user clicks on the headline text. None means no action; Hyperlink will open the webpage specified in the Hyperlink field and Function requires a Codeunit and function in the Action Processing fields.	None/ Hyperlink/ Function	Function
Hyperlink	The optional URL to navigate to by clicking a link in the headline.	N/A	N/A
Action Processing Function CU	Required if Click Action Type is Function, this is the Object Number of the Code Unit used to process the action.	Numeric value	70338200
Action Processing Func. CU Name	This shows the name of selected Codeunit in Action Processing Function CU.	Alphabetic value first letter of each word is uppercase.	CSM API Utility Functions

Field	Description	Value Type	Example Value
Action Processing Func. Name	This is required if Click Action Type is Function, this is the Function Name in the Code Unit used to process the action.	All caps alphabetic value	HEADLINEACTIONOPENCSMSETUP

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