

CSM FOR BIGCOMMERCE An App by Suite Engine

Microsoft Dynamics 365 Business Central

Order Management Setup

Release: 3.4

Last Revised: June 4, 2024



ORDER MANAGEMENT SETUP

Channel Sales Manager (CSM) for BigCommerce | Release: 3.4

(D365 Business Central Version 23.2 (Platform 23.0.15562.0 + Application 23.2.14098.14274)

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

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

Table of Contents

AXXXXX .

CSM Initial Setup	1
Manage the CSM for BigCommerce Extension	1
CSM Permission Sets	2
CSM Role Center	2
CSM Setup	3
Creating and Managing Your CSM Subscription	4
Enabling and Receiving CSM Notifications	5
The CSM for BigCommerce Setup Wizard	6
Obtain Channel Credentials in BigCommerce	8
Enter Channel Credentials in Business Central	
Verify Channel Connectivity and Retrieve Your First Channel Orders	11
CSM Functional Settings and Cross References	14
CSM Sales Channel	14
State and Province Cross References	23
CSM Shipping Methods	24
CSM Payment Methods	25
Accepting Gift Certificates and Store Credit	26
CSM Shipping Carriers	27
CSM Tax Groups	
Multiple Currencies	
CSM Order Status Matrix	

CSM For BigCommerce

An App by Suite Engine



Order Management Setup

Release:	3.4
----------	-----

Order Notes Placement	
Item Mappings	
Selling Virtual Products and Gift Certificates	
CSM Automation List	
API Automation Tasks	
The Housekeeping Automation	
Configuring Job Queue Entries	
CSM Sales Operation Rules	
CSM Sales Operation Rule Functions	
CSM Everyday Operations	
Running the Automation Manually	
Viewing Channel Orders	
Updating Channel Orders	
Deleting Channel Orders	
Channel Order Card	
Sales Channel Customers	
Sending Customers from Business Central to BigCommerce	
Sending Shipment Information	51
Payment Application	
Retrieving Refunds from BigCommerce	
Sending Sales Returns from Business Central to BigCommerce	53
CSM Setup	53
Creating and Releasing Return Orders	54
Selecting Payment Methods and Posting Return Orders	55
Sending and Retrieving Refund Information from BigCommerce	
Archiving Channel Orders	
CSM Setup	57
Sales Channel Setup	
Housekeeping Automation Setup	
Channel Order Archiving	
Viewing Archived CSM Channel Orders	
Troubleshooting CSM Activities	
Role Center Cues	
+1 ···	
KALK	Suite Engine, LLC suiteengine.com
STAR.	

CSM For BigCommerce

An App by Suite Engine



ALAR A

Order Management Setup Release: 3.4

Reprocessing CSM API Messages	61
CSM Additional Details	62
CSM API Data	62
Appendix A: Working with the BigCommerce API Reference Tool	63
Appendix B: CSM Role Center Headline Data	65
Appendix C: API Credentials & Sales Channel Data	67



Release: 3.4

CSM Initial Setup

Before you can start the process of setting up CSM, there are some basic, preliminary steps you must perform to prepare your solution for setup and configuration.

Manage the CSM for BigCommerce Extension

The CSM for BigCommerce solution is comprised of multiple extensions:

- *Channel Sales Manager Core*: this contains the core functionality of the CSM solution, such as the tables in which data is stored, the API engine that processes the API calls used to send and receive data between an eCommerce channel and Dynamics 365 Business Central, and the automation routines that execute these API calls.
- *Channel Sales Manager for BigCommerce*: this facilitates communication between CSM Core and an external BigCommerce environment.
- Suite Engine Variations Library: if you are working with items that are available in multiple variations (for example, color or size), this extension allows you to define this structure within Business Central. It is included as part of CSM to support online retailers that sell configurable items.
- Suite Engine Common Base: this is used to manage your subscription to CSM and other Suite Engine products.

It is necessary to enable communication to your external payment platform for each of these extensions:

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

Note: it is only necessary to enable this setting if you are working in a sandbox Business Central environment. This setting can be turned off in your production environment. Because sandboxes are typically created by making a copy of a production environment and then restoring it to a new sandbox, we **strongly recommend** keeping this setting disabled in your production environment. In this way the setting will also be disabled in your new sandboxes, preventing the inadvertent sending of data to your live BigCommerce platform. This gives you an opportunity to change the API credentials in your sandbox to point to your BigCommerce sandbox, after which you can then enable this setting.

- 5. Close the Extensions Settings page and repeat this process for the other CSM extensions:
 - Channel Sales Manager for BigCommerce
 - Suite Engine Variations Library
 - Suite Engine Common Base





CSM Permission Sets

CSM includes out-of-the-box permission sets for each of the extensions listed in the preceding section. In order to work with CSM functionality, it is necessary to assign these permission sets to your users.

The process of assigning CSM permissions is no different than the assignment of standard Business Central permission sets. For guidance on best practices for assigning permissions sets, see <u>here</u>.

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:

- Log on 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 <u>CSM Role Center Headlines</u>.

CSM Setup

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

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

- You can search for CSM Setup by choosing the 🔎 icon and entering "CSM Setup."
- From the CSM Administrator Role Center, choose 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.

X



Creating and Managing Your CSM Subscription

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

Choose the 'Subscriptions' ribbon > and select the 'CSM for BigCommerce Free Trial' action.

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

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

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

If CSM for BigCommerce is being installed in a Business Central environment in which other CSM solutions have been deployed, the trial subscription will be created for the customer ID subscription account that is already assigned in Business Central. 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 BigCommerce.



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

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

Enabling and Receiving CSM Notifications

CSM uses Business Central's <u>notifications functionality</u> 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.

X



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 BigCommerce Setup Wizard

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

Select New -> BigCommerce Quick Setup.



This will start the BigCommerce Setup Wizard.

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

CSM BigComm Setup Wizard	
Welcome to the BigCommerce Quick Setup Wizard. This wizard, will create or update the base information necessary to utilize the CSM for BigCommerce Module. Indicate below what data you would like to load at this time.	
Load CSM Triggers	
Load BigCommerce API Data	

On the second page of the wizard, you can specify information about the API set you are using to facilitate communications between Business Central and your external channel platform. For more information on how to retrieve this information, choose the **How to obtain credentials** button.

Field	Description	Example Value
BigCommerce API Set Code	This is a unique code that identifies the API set. It can be any value you wish, but we recommend naming it something meaningful that describes the external source the API set communicates with.	BIGCOMMERCE
BigCommerce API Set Description	This is a text description of the API set. It can be any value you wish, but we recommend using a meaningful description. Note, that you may deal with other channels in the future (Shopify, BigCommerce 2.xx, Amazon, etc.) and may even require a 2 nd API set for an additional BigCommerce 1.x instance you may deploy.	BigCommerce API Data

Order Management Setup

Release: 3.4



Field	Description	Example Value
BigCommerce Host Name	This is the host URL endpoint for soap services on your BigCommerce server. Normally it is <i>api.bigcommerce/stores</i> .	api.bigcommerce/stores
BigCommerce Store Hash	Enter the unique store ID that identifies your storefront on the BigCommerce platform. It can be obtained by reviewing your store's URL and locating the value that follows the host name. For example, if your store's URL is <i>api/bigcommerce/stores/123456</i> , the client ID would be <i>123456</i> .	Obtained from the BigCommerce store's URL.
BigCommerce Access Token	This is the BigCommerce access token that CSM use to authenticate API calls.	Use the API key you defined on BigCommerce for the User ID

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

CSM BigComm Setup Wizard		××
0		
"Safes Drawed Information" Enter year Sales Charnel Information Hence provide the following information regarding the Eg/Commerce Sales Discript		
BigCommore Salas Channel Code	BIGCOMMERCERDC	11
BigConnecto Sales Channel Description	BipConnects Ratal Consume: Ete	

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

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

CSM BigComm Setup Wizard	× ×
Prevent News I to Laad the HigCompresses Data. On, were are ready to load the data, prevent resident the data-load, prevent back to invalue any cherogen you would like to make.	

Press "Finish" on the Final Page and the Wizard will close.



Order Management Setup

Release: 3.4

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 <u>here</u>.

			C		A DOVED IN MARKE
CSM Setu	Iр				
	Concerto do	Actions	Related	Fewer options	
New Process Subs	criptions	rectoris		communities more communities	mon si waya ta maara ta minam
New Process Subs	criptions	- Actions		Sam for massommen	mon set ways to mon a to minim
New Process Subs	criptions	, it is it is a second s		sam for mussolimition	тноп шт бода та населато нитот
New Process Subs	criptions			sam for mussolmmun	Than 5 Franzo 15 Thom 2 To Thirting
New Process Subs	±			Log Retention	- 30 days

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

Obtain Channel Credentials in BigCommerce

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

Login to your BigCommerce Admin Portal

To create API accounts, you must be logged in as the store owner.

1. Go to Settings > API Accounts and click + Create API Account.

A maximum of 50 accounts can be created per store.



2. Select the **Account type**. This will determine whether the new account is a V2/V3 API token or a Stencil-CLI token, used in <u>theme customization</u>. For stencil-CLI tokens, you can select the access level.



Order Management Setup

Release: 3.4

Account type								
Create stencil-CLI token								
Name								
ERP connection, channel ad	visor							
Stencil-CLI access level								
Stencil-CLI access level Should this token be used on storefront?	y to develop a theme on	op of your s	itore, or sho	uld it also	be able to	push new	themes onto y	our liv
Stencil-CLI access level Should this token be used onl storefront? You can find more information	y to develop a theme on	op of your s	store, or sho	uld it also	be able to	push new	themes onto y	our li

3. Enter a **Name** for the app/integration corresponding to this account, then copy or make a note of the **API path** — you'll need it to use the API account. The name can be a minimum of four characters long.

Name	
App/Integration Name	
API Path	
https://api.bigcommerce.com/stores/	

4. Under OAuth Scopes, specify the API resources and permissions to which your app/integration requires access.

OAuth scopes

Which API resources does your app or integration require access to? You can find more information on API resources here 🗹

ContentNoneread-onlymodifyCheckout contentNonemodifyCustomersNoneread-onlymodify



We offer a variety of OAuth Scopes for customizing and controlling access to your store's data. For more information, see our <u>API Documentation</u>.

5. When you're done making changes, click **Save**. A successful save will display the pop-up shown below. It will contain the API credentials that your app will need for OAuth access, and you will be prompted by your browser to download a **.txt** file containing the same credentials for safekeeping on your computer.

Keep your credentials! There is no way to return to this pop-up after you select **Done** to dismiss it. Make sure you store your credentials – either by copying/pasting the contents of each field out of the pop-up or by keeping the downloaded .txt file. We recommend adding the **API Path** value from Step 2 to these credentials, as it is used for all API calls using the token.

BigCommerce API credentials

If you are using Chrome, Firefox, or Edge a text file containing the API token and client ID should have downloaded to your computer.

Client ID Client secret Client secret Access token

This is the only copy you will have access to. If you lose it, delete the account and create a new one...



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 "API Key" 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.

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



Order Management Setup Release: 3.4

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

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

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

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

Note: it may be necessary on occasion to manually adjust retrieval dates and times for troubleshooting or reprocessing 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 BigCommerce site's time zone setting to UTC.

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:



Order Management Setup Release: 3.4

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

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



> Order Management Setup Release: 3.4

CSM Functional Settings and Cross References

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

CSM Sales Channel

Sales Channels are the heart of CSM; Most user interaction centers around a Sales Channel. Think of a Sales Channel as an eCommerce or marketplace store. For example, if you have 2 BigCommerce Stores defined, one B2C, the other B2B, they would be set up as two Sales Channels in CSM.

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

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



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



Order Management Setup

Release: 3.4

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

General FastTab				
Field	Description	Example Value		
Code	This is a unique code that identifies the Sales Channel. It can be any value you wish, but we recommend naming it something meaningful that describes the Sales Channel.	BIGCOMMERCEB2C		
Description	This is a text description of the Sales Channel.	BigCommerce Retail Store (B2C)		
	Order Management FastTab			
Field	Description	Example Value		
Inventory Location	The BC inventory location that supplies this store. BC Sales Orders Created for this Sales Channel will specify this inventory location. Listing Management will also use this value in its inventory availability calculation.	BLUE		
SO No. Series	The No. Series that should be used for Sales Order Number when building Business Central Sales Orders for this Sales Channel.	CSM-ORD-BIG		
Channel Dimension	If populated, this BC Financial Dimension will be set on all BC Sales Orders created from this Sales Channel. Primary Dimension 1.	SALES		
Channel Dimension 2	If populated, this BC Financial Dimension will be set on all BC Sales Orders created from this Sales Channel. Primary Dimension 2.			
SO Build Codeunit	The Object number of the Codeunit that should create BC Sales Orders. By default, this should be 70338209 which is the supplied CSM functionality to build Sales Orders. You can however customize the functionality by creating a new Codeunit and specifying its number here. It is recommended that you keep the default value.	70338209		
External Document No. Format	Enter the syntax you wish to use for assigning external document numbers to orders (such as sales and sales return orders) that are generated from this channel's CSM orders. You can assign one or more fields from the CSM Order Header table as the source value(s) for external document numbers. Note that while fields such as text and code type fields will be acceptable, others such as options/enumerations, dates, and Booleans, will not. Each field must be entered according to its field (not caption) name and enclosed in <> brackets. For example, if you wanted to use the value from the CSM order's Order ID field as the external document number on related sales orders, you would enter < <i>Order ID</i> > in this field. Any characters you enter in this field that are not enclosed in <> brackets will be treated as static values. This can be useful if you want to use multiple fields as the basis of an external document number, as you can include something like a hyphen as a delimiter. For example, an entry of < <i>Sales Channel Code>-<order id=""></order></i> would indicate that the external document number will be comprised of a CSM order's sales channel code and order ID, separated by a hyphen. In a scenario where the values that comprise an external document, CSM will truncate the value based on the field's maximum character length.	<sales channel="" code="">- <order id=""></order></sales>		

X

CSM For BigCommerce

An App by Suite Engine

Order Management Setup





	If you leave this field blank, CSM will not assign any external document numbers to orders created for the channel.	
	Note: you may need to choose the Show More action on the Order Management FastTab in order to see this field.	
Start Processing Date Time	It is possible to configure the channel order retrieval automation routine to automatically create an associated Business Central sales order as part of the retrieval activity. If you want to set a cut-off date and time as to when this sales order creation is performed against channel orders, you may do so in this field. Retrieved channel orders that fall before this date will be assigned a status of complete and become ineligible for further activity. Channel orders that fall on or after the channel's start processing date and time will remain open and corresponding Business Central sales orders will be automatically created as part of the order retrieval process. Leaving this field blank will instruct CSM to create sales orders for all retrieved channel orders. For more information on the initial retrieval of sales channel orders, see here.	
Payment Behavior	Indicates how this sales channel processes payments. The standard behavior is to use <i>Payments</i> , but if you want to retrieve refunds that are entered for orders on BigCommerce into Business Central, then you must select the <i>Channel</i> option.	Payments or Channel (if retrieving refunds)
Payment Method Code	If the assigned payment behavior is <i>Channel</i> , enter or use the AssistButton to assign the payment method that will be assigned to orders. This payment method <i>must not</i> have an assigned balancing account in Business Central.	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
Exclude G/L Account Line on Shipment	Enable this field to instruct CSM to exclude any sales lines for G/L accounts when sending an order's shipment information from Business Central to BigCommerce. This results in CSM sending less data to BigCommerce, which can improve performance. If you are working with CSM listings, this field will also serve as a default setting to indicate whether any channel listings for G/L accounts are set to be skipped when sending shipments.	True
Exclude Resource Line on Shipment	Enable this field to instruct CSM to exclude any sales lines for resources when sending an order's shipment information from Business Central to BigCommerce. This results in CSM sending less data to BigCommerce, which can improve performance. If you are working with CSM listings, this field will also serve as a default setting to indicate whether any channel listings for resources are set to be skipped when sending shipments.	True
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

CX &



Release: 3.4

Send Invoice Capture	If CSM is sending Invoice information, this field tells CSM whether a capture transaction should be sent immediately following the Invoice. For BigCommerce, this is dependent by payment method. If your payment method Behavior is set to payments (which it should be for BigCommerce implementations), CSM uses the Send Invoice Capture value set for each Payment Method (See setting up Channel Payment Methods later in this document).	True
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 BigCommerce, and these fields can be ignored for your BigCommerce 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 BigCommerce, and these fields can be ignored for your BigCommerce channels.	N/A
Send Refund Cr. Memo	Enable this field to indicate that you want <u>to send refund credit memo information from</u> Business Central to BigCommerce.	Yes
Send Refund Cr. Memo When	 If you have enabled the functionality to send credit memo information to BigCommerce, select the method by which it will be sent: Immediate: will send automatically when the return order/credit memo is posted. Scheduled: will be sent when the SENDCREDITMEMO automation runs. Manual: will be sent when the user checks the External Requires Update field on the CSM order document line and uses the Send to Channel action on the CSM Order page. 	Immediate
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. <i>Note:</i> this field has been superseded by CSM's <u>sales operation rules feature</u> 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. <i>Note:</i> this field has been superseded by CSM's <u>sales operation rules feature</u> 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.	
Currency Behaviour	Select the method by which you want CSM to assign currencies to sales orders. Options are:	







. Release: 3.4

	• <i>Customer:</i> CSM will assign the currency that has been assigned to the related Business Central customer record to sales orders created for that customer.	
	• Order: CSM will assign the currency from the retrieved channel order to the Business Central sales order. In addition to enabling this setting, you must also map your BigCommerce and Business Central currencies to one another.	
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: <i>Combine CSM Address 2 and 3:</i> 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. <i>Use CSM Order Address 2:</i> 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: 30D would keep CSM Channel Orders in the current list for 30 days after being closed or cancelled.	
Auto Channel Order Archive	Use this field to enable and disable automatic archiving for Channel Orders for this Channel.	
Gift Wrap	Gift wrapping is not supported by CSM in the current release.	N/A
Gift Wrap Line Type	If you choose Line as the Gift Wrap Behavior, this field specifies the Sales Order Line Type which should be used for the Gift Wrap Charge (Revenue from the Customer). The values can be G/L Account, Item, Resource, or Charge (Item).	
Gift Wrap Order Line No.	If you choose Line as the Gift Wrap Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Gift Wrap Line Type chosen).	
Other Charges Behavior	This setting tells CSM how it should handle Other Charges on orders received from the Channel. If you select None, Other Charges will be ignored. If you select Line, then when CSM creates the Business Central Sales Order for a BigCommerce 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

Xx



Release: 3.4



Other Charges Order Line No.	If you choose Line as the Other Charges Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Other Charges Line Type chosen).	45120
Sales Tax Behavior	 Select the manner in which sales tax will be entered on Business Central sales orders that are created from retrieved BigCommerce orders. Options are: None: CSM will build sales orders according to Business Central's standard sales tax behavior. The Tax Liable field on sales lines will be set to <i>True</i>, and tax will be calculated on those lines based on Business Central setup. Any sales tax information retrieved from BigCommerce will be ignored as part of this process. Line: CSM will enter a separate line on sales orders for each item's sales tax that was collected and retrieved from BigCommerce. With this configuration, the Tax Liable field on sales lines will be set to <i>False</i> so that Business Central does not attempt to calculate tax values. In addition to entering separate line for any tax that was collected on order-level charges such as shipping or gift wrap. Consolidated: CSM will enter a single line on sales orders for the total tax amount that was collected and retrieved from BigCommerce. With this configuration, the Tax Liable field on sales tax anount, CSM will also add a separate line for any tax that was collected on order-level charges such as shipping or gift wrap. 	Line
Sales Tax Line Type	If you selected either the <i>Line</i> or <i>Consolidated</i> option in the Sales Tax Behavior field, enter or use the AssistButton to choose the type of sales line you want to enter on sales orders for retrieved sales tax amounts. Standard Business Central sales line options are available: G/L accounts, items, resources, fixed assets, item charges, or allocation accounts.	G/L Account
Sales Tax Order Line No.	Enter or use the AssistButton to assign the Business Central record that will be added to sales lines for retrieved sales tax. The record you can assign is dependent on the selected sales tax line type. For example, if the sale channel's sales tax line type was G/L account, you would assign a G/L account in this field.	
Enable Refund Processing	Enable this field if you want <u>to retrieve refunds that are entered for orders on</u> <u>BigCommerce into Business Central</u> , then build credit memos for them. Enabling this setting will display a number of refund configuration fields below it.	
Cr. Memo build Codeunit	The Codeunit ID to use when building a Sales Cr. Memo for a CSM Order from this channel.	70338215
Credit Memo No. Series	The number series to use when creating new Business Central Sales Cr. Memo from this Sales Channels Channel Orders.	CSM-CR
Refund Discrepancy Behavior	 Indicate how you want the sales channel to address scenarios where a retrieved refund amount differs the amount that is entered on the credit memo that is created in Business Central. Options are: None: any refund discrepancies will be ignored by CSM. 	Line



Order Management Setup

Release: 3.4

	• <i>Line</i> : an additional line in the amount of the discrepancy will be added to the sales credit memo.	
Refund Discrepancy Line Type	If you have indicated that you want CSM to create an additional line for refund discrepancies on sales credit memos, enter or use the AssistButton to choose the type of account to which these discrepancies will be recorded. You can indicate that refund discrepancies should be posted to a G/L account, item, resource, fixed asset, or item charge.	G/L Account
Refund Discrepancy Line No.	Enter or use the AssistButton to assign the account to which refund discrepancies will be recorded. The record type is dependent on the selection in the Refund Discrepancy Line Type field.	
Return Location	Enter or use the AssistButton to assign the Business Central location to which you want to receive items that are being returned by customers that you want to re-stock. This location is assigned to credit memos that are created by CSM when refunds that are initiated through BigCommerce are retrieved into Business Central.	MAIN
Returnless Location	Enter or use the AssistButton to assign the Business Central location to which you want to receive items that are being returned by customers that you want to credit but do not want to re-stock (typically this is a virtual location). This location is assigned to credit memos that are created by CSM when refunds that are initiated through BigCommerce are retrieved into Business Central.	RETURNLESS
Refund Payment Selection Method fields	 If you want to send refund credit memo information from Business Central to BigCommerce, you can select the default payment method for these transactions. You can define a default payment method for both customer and guest orders, which in this instance refers to those customers who have set up an account on your BigCommerce platform versus those who have not. Options are: Original Payment Methods: refunds will be paid out to the payment method that was used for the original sales order. For example, if a sales order was paid with a credit card, the refund would be made to that credit card's account. Manual Selection: users will manually choose the way in which refund payments are made on an order-by-order basis. Store Credit Only: refunds will be paid as store credit to the customer's account in BigCommerce. Offline/custom: information about the refund will be communicated to BigCommerce, but BigCommerce will not process the transaction. In this scenario, the refund must be processed through an external activity (directly through the payment provider, for example) or via a custom extension. The options for customer and guest orders are the same, with one exception being that Store Credit Only cannot be selected for guest orders. This is because BigCommerce does not permit store credit for guest customers. 	



CSM For BigCommerce

An App by Suite Engine

Order Management Setup

Release: 3.4

	₽ 2 2 2 2 2 2	Ŕ	+	Ē		
Listing APIs Actions Relate	DCC	tions				
Send Shipment When · · Immediate			Other Cha	rges Order		•
Invoice Behavior			Sales Tax			
Send Invoice Informa ·			Sales Tax I	Behavior · · · ·	Line	
Send Invoice When · · · · Immediate			Sales Tax (Order Line	G/L Account	
Send Invoice Capture 🕠 🌑			Sales Tax (Order Line	22720	
			Item Beha	vior		
			Use Item S	Sales UOM 🕠		
				₽		
Customers						
Customer Template · · · · CSMTEMPLAT	E		Auto Crea	te Contact 🕠		
New Customer Behav Auto Create			Default Cu	ustomer Gr		
Guest Customer Beha · Auto Create			New Cust	omer No. S	CSM-CUST	

I !-+!.. .. NA - .. - .. - .. + \

Field	Description	Example Value		
Customer Template	A valid BC Customer that CSM should use when dealing with a customer. When Creating customers, CSM will use this customer as a template for the customer's creation. When Sales Channel is chosen as a behavior or New Customers or Guest Customers, CSM will create the Sales Order with this customer and adjust the ship to address to the actual customers information.	CSMTEMPLATE		
New Customer Behavior	Indicates how CSM will treat customers for what CSM determines is a new customer. Valid Choices are: Auto Create, Sales Channel, and Manual. For BigCommerce, if the customer creates a new BigCommerce account when checking out, or for existing BigCommerce customers that have not been defined to CSM (either by setting up the customer as a Sales Channel Customer, or receiving a BigCommerce Order for the customer), CSM considers them a new customer.	Auto Create		

Xx







	If the behavior is set to Auto Create, CSM will automatically create a new BC customer and associated CSM Channel Customer based on the defined Customer Template, this will occur when CSM builds the BC Sales Order from the Channel Order. If the behavior is set to Sales Channel, the CSM will not create a new customer, but will build the sales order to the defined Customer Template customer and change the billing and ship-to addresses directly on the Sales Order appropriately. If the behavior is set to Manual, CSM will not automatically create a customer, and the Sales Order build process will fail unless a Channel Customer is manually setup and linked to a valid Business Central customer.	
Guest Customer Behavior	Indicates how CSM will treat customers for what CSM determines is a guest customer. Valid Choices are: Auto Create, Sales Channel, and Manual. For BigCommerce, if the customer checks out as a guest, CSM considers them a guest customer. If the behavior is set to Auto Create, CSM will automatically create a new BC customer and associated CSM Channel Customer based on the defined Customer Template, this will occur when CSM builds the BC Sales Order from the Channel Order. Even though they checked out as a guest, CSM can still identify the customer if they use the same email address for future orders the customer may place. If the behavior is set to Sales Channel, the CSM will not create a new customer, but will build the sales order to the defined Customer Template customer and change the billing and ship-to addresses directly on the Sales Order appropriately. If the behavior is set to Manual, CSM will not automatically create a customer, and the Sales Order build process will fail unless a Channel Customer is manually setup and linked to a valid BC customer.	Auto Create
Auto Create Contact	Indicates whether CSM will also automatically create a BC contact for any new customers CSM creates.	Yes
Default Customer Group	A Customer Group Id to send to the channel for those customers not assigned to a price group.	
New Customer No. Series	Indicates which No. Series should be used when CSM automatically creates a new BC customer.	CSM-CUST
Field	Description	Example Value
AP Logging Level	Fence used to determine what should be logged	
Import Object Name	The Import Object used for special file imports. Only used in custom situations	
API Channel Identifier	For BigCommerce, this will be the BigCommerce ID of the Store.	api.bigcommerce.com/st ores
Website ID	For BigCommerce, this will be the BigCommerce ID of the Website.	api.bigcommerce.com/st ores
API Set Code	Identifies the API Set code that should be used for API communication with BigCommerce. This should be the value that you used to setup the BigCommerce API Set in the CSM API Sets section earlier in this document.	BigCommerce



Order Management Setup

Release: 3.4

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

State and Province Cross References

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

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

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

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



Order Management Setup

Release: 3.4

Get All Countries			
GET https://apl.blgcommerce.com/stores/{store_hash}/v2/countries			
Get a list of all countries available. A country or territory, identifiable by an ISO 3166 code.	country	Auth Parameters	
Request		 Send API Request. Response 	Preview ¢
✓ Security: API Key		200 OK	
An API key is a token that you provide when making API calls. Include the token in a header para called X-Auth-Token . Example: X-Auth-Token: 123	meter	138, ry/": "mexico", ry_1502": "00", ry_1503": "MEX", s": (
Path Parameters		"https://apl.bigcommerce.com/storen/ip cmmC6": "/countries/138/states"	erfdgf921/v2/countr
store_hash string	technicat		

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

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

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 methods are set up to correspond to existing Business Central shipping agent codes.

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

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



Order Management Setup

Release: 3.4

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

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

- 5. In the **Shipping Agent Code** field, use the AssistButton to assign a Business Central shipping agent code to the shipping method.
- 6. It is possible to add a line for shipping charges to sales orders on which a shipping method is assigned, allowing you to post these charges to a dedicated account in Business Central:
 - If you want to post a shipping method's shipping charges to a Business Central account, leave the **Shipping Order Behavior** field set to *Default*, then use the **Shipping Order Charge Type** and **Shipping Order Change No.** fields to identify the account to which charges will be recorded.
 - If you do not want to post a shipping method's shipping charges to a Business Central account, change the value in the Shipping Order Behavior field to *Skip*, then leave the Shipping Order Charge Type and Shipping Order Change No. fields blank.

Note: CSM also retrieves shipping zone records from the connected BigCommerce store and assigns them to the CSM sales channel. You can review these records from the CSM sales channel record by choosing the **Related** ribbon, then selecting the **Setup** menu and choosing the **Shipping Zones** action. These records are not associated to corresponding Business Central records and exist purely to facilitate the linkage of CSM shipping methods to Business Central shipping agents. It is not recommended that you modify these retrieved shipping zone records.

CSM Payment Methods

Most eCommerce platforms contain some sort of way to identify the manner by which customer 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 BigCommerce. BigCommerce 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 Adyen) and digital wallets (such as Apple Pay and Google Pay).

It is recommended that you use CSM payment methods to link your Business Central payment method codes and your BigCommerce payment methods. When payment information is sent between your Business Central and BigCommerce environments, this association will ensure that the proper order information is maintained in both platforms. You can instruct CSM to retrieve payment methods from BigCommerce and automatically create corresponding CSM records:

- 1. Choose the 🔎 icon, enter CSM Sales Channels, and then choose the related link.
- 2. Open the CSM sales channel record for which you want to retrieve 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 payment methods from the sales channel's connected BigCommerce store and creates new CSM payment 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.

Depending on the payment method type, a balancing account may need to be present. Payment methods that represent credit card transactions should have a balancing account so that Business Central can automatically post and apply the payment entry in the customer's ledger when the sales order is invoiced. For other payment method types such as check or on account, a blank balancing account will typically make more sense.

- 6. If you need to assign a balancing account to a payment method, there are two options available to you:
 - You can assign a balancing account to the Business Central payment method code that is linked to the CSM payment method.
 - If you do not wish to assign a balancing account to your Business Central payment method, you can instead define one for the CSM payment method by using the **Bal. Account Type** and **Bal. Account No.** fields on the CSM payment method line.

When CSM posts a payment, it will first look to the CSM payment method line to see if a balancing account has been defined and use that. If it does not find a balancing account for the CSM payment method, it will check the linked Business Central payment method and use the balancing account that has been assigned to it.

- 7. 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.

Note: if you want <u>to retrieve refunds that are entered for orders on BigCommerce into Business Central</u>, the payment method(s) that will be assigned to orders or refunds must have a defined balancing account in Business Central.

Accepting Gift Certificates and Store Credit

If you accept gift certificates and/or store credit as payment methods on your sales channel, you need to set these up as CSM payment method types. By default, BigCommerce uses dedicated *bigcommerce_gift_certifcate* and



bigcommerce_store_credit codes for these types; these will be automatically loaded when you execute the **Retrieve Payment Methods** action in the **CSM Payment Methods** window.

To set up payment methods for gift certificates and store credit:

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

The payment method codes you assign to these lines must have a defined balancing account in Business Central in order to properly record activity. It is recommended that you assign a liability account from your balance sheet as this balancing account.

2. Place check marks in the **BigCommerce Store Credit** and **BigCommerce Gift Certificate** fields for the relevant CSM payment method lines. This will allow CSM to properly adjust the order total on CSM orders that include these payment methods.

CSM Shipping Carriers

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

CSM shipping carriers correspond to "shipping provider" records in BigCommerce. BigCommerce uses this record type to represent common carriers such as FedEX, UPS, and USPS. Supported carriers are determined by BigCommerce and not subject to expansion or change; it is not possible for BigCommerce users to manually set up new records.

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

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

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

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



CSM Tax Groups

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

Multiple Currencies

If you configure your sales channel to assign currencies from retrieved orders to the related sales orders in Business Central, you must map the currency codes from your BigCommerce channel to corresponding records in Business Central. When an order is retrieved from BigCommerce, CSM will review the currency on that order and assign a Business Central currency code to the related sales order based on this channel mapping.

To define currencies for your sales channel:

- 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 currencies.
- 3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Currencies** action.
- 4. In the **Currencies** window, enter a BigCommerce currency code in the **Sales Channel Currency Code** field.
- 5. Enter or use the AssistButton in the **Currency Code** field to assign a Business Central currency to the CSM currency.
- 6. Repeat this process for additional currencies.
- 7. When you are done mapping BigCommerce currencies to Business Central records, close the **Currencies** window.
- 8. In the CSM Sales Channel window, expand the Order Management FastTab and place a check mark in the Allow Multi-Currency field.

CSM Order Status Matrix

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

Note: By default, the order status matrix setup is configured to assign a status of Error to CSM orders with a BigCommerce status of Completed and no existing sales order in Business Central.

Order Notes Placement

When CSM retrieves an order from BigCommerce, it is possible to include any notes that have been entered for it. By default, CSM will automatically retrieve both customer-entered notes and any notes that have been generated from the system or entered through the BigCommerce administration portal along with the rest of the order information. Retrieved order notes are entered as CSM order document lines on the related CSM order.

If you wish, you can instruct CSM to place retrieved order notes on the sales order that is created from the CSM order:

- 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 set up order note placement.
- 3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Order Notes Placement** action.
- 4. On a new line, enter the code or reference value that the channel uses to identify the order note type in the **Order Document No.** field.



If you are unfamiliar with the correct syntax used by the channel, we recommend you retrieve an order with the desired comment type into Business Central, then review the **CSM Order Documents** FastTab. The identifying value will be presented in the **Order Document No.** field.

For example, in the following screenshot, we can see that BigCommerce identifies a customer-entered note as *Customer Message* and notes entered through the administration portal as *Staff Notes*:

CSI	M Order Do	cume	ents 🔹 Send To Chan	nel 🗮 Document Lines	Document Transactions	} [≭] New Line	🔆 Delete Line
	Order Document Type↑		Order Document No. ↑	Channel Document No	Channel Creation Date		Channel Payment Method
	Payment		785344274		2/14/2024 6:41 PM		stripeupe
	Payment		785344326		2/14/2024 6:42 PM		stripeupe
\rightarrow	<u>Note</u>	÷	Customer Message				
	Note		Staff Notes				

5. In the **Placement** field, use the dropdown to indicate how you want these comments to be placed on sales orders. You can choose to have comments placed on sales lines or as sales order comments.

Item Mappings

If you want to properly build sales orders in Business Central with the data you retrieve from BigCommerce, CSM must be able to map the product information it receives to a corresponding item in Business Central. When an order is retrieved from BigCommerce, CSM will attempt to find a value in Business Central that corresponds to the channel item number it retrieved from BigCommerce:

- If CSM listings are set up for your sales channel, CSM will look for a listing with a matching channel item SKU.
- If CSM listings are not set up (or they are but CSM is unable to find a match), CSM will look at a number of standard Business Central tables:
 - CSM will review item records to see if any item numbers correspond to the channel item number;
 - CSM will review item identifier records to see if any item identifier codes correspond to the channel item number;
 - CSM will review item reference records to see if any reference numbers correspond to the channel item number.

In this way, CSM provides a number of mapping options to account for different scenarios pertaining to the way in which your products are defined in BigCommerce and Business Central. Accordingly, the product mapping activities you need to perform depend on your existing data:

- If you are using CSM listing management to maintain your BigCommerce product information in Business Central, then you must create CSM listings. Please refer to the separate documentation on listing management.
- If you are not using CSM listing management:
 - If your BigCommerce product SKUs are identical to your Business Central item numbers, there is no further setup required on your part.



 If your BigCommerce product SKUs differ from your Business Central item numbers, then you must either set up item identifiers or item references for your items in Business Central. As part of this setup, you must assign the BigCommerce product SKU as the item identifier code/item reference number. You must also define the unit of measure you want to assign to sales orders for the item.

Selling Virtual Products and Gift Certificates

CSM supports the selling of virtual products and gift certificates on your BigCommerce storefront. There are, however, some setup changes to take into consideration if you want to sell these products:

- Virtual products are still set up as products in BigCommerce and must be mapped to one of the supported record types (CSM listing, item, item identifier, etc.) in Business Central
- If you sell gift certificates, BigCommerce will create orders with a *giftcertifcate* value on the order lines. You must map this value to one of the supported record types (CSM listing, item, item identifier, etc.) in Business Central.
- If a BigCommerce order is comprised entirely of virtual products or gift certificates, BigCommerce will not assign a shipping method to it. If you sell virtual products or gift certificates, it is recommended that you set up a CSM shipping method with a **Sales Channel Shipping Method** of blank and a shipping agent code for something like *NONE* or *VIRTUAL*. This will allow CSM to assign a shipping agent code to sales orders that contain only virtual products and/or gift certificates.
- If a BigCommerce order is comprised entirely of virtual products or gift certificates, it is retrieved into Business Central with a status of *Completed*. This will result in a failure to build a sales order, since the default order status matrix settings in *CSM for BigCommerce* assign a CSM order status of *Error* to any order with a BigCommerce status of *Completed* and no existing sales order in Business Central. If you sell virtual products or gift certificates, it is recommended that you update the related order status matrix line to have an implied order status of *New* rather than *Error*.

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.





Order Management Setup

Release: 3.4

	Business Central														Sand	box a	9	
1	SM Kulternation July							D							1	-tank	1 0	1
	1.		12211															
	P Search + Hee	in the set	E Delete													-	Y #	
	Sele Channel Carlo	Annein SH	Squeet?	5101	Comunitie Color 7	÷.	Sitement Peternet	Lat for Transie	Derber	Clevel Bala Web	San Orbe-	Dusington	4/81 Crk- 10	8,49 869 10	Am hei ID	AR SH Circle	- ant fu Carlle	-
	-	Latery	3385	CATEGORY	LISTINGMO.			UV/2021 12:00 AW	Not Replice.		Not Applicat	Swids Channel Category to Big.	0	0	0	INCOMME.		-7
	INCOMMER.	Listing	1105	CANSON	LISTINGHO.	0			Not Applica.		Net Applica	Sarels Channel Category to Big.	0		0	ENSCOMME.		
	BIGCOMMER.	Lating	1110	ATTRIBUTES.	USTINGMO.			U1/202112.00 AM	Not Applica.		HILL ABBROK	Sends Attribute Set buckulling	-0	0	-0	BIOCOMME.		- 1
	EGCOMMER_	Lateral	1110	ATTORUTEL.	LITTINGNG.	0			Not Applica.		Hot Applica.	Sends Attribute Set Including	0	0		ERCOMME.		
	BIOCOMMER_	Linterg	3115	Attraute	LISTINGMG.	Ö		1/1/2021 12:00 AM	Not Applica.		Net Applica	Sends Attribute Information On.	0	a	Ū.	DIGCOMME.		
	BIOCOMMER.	Living	816	ATTRIBUTE	LETINIME.	0			Not Applica.		Net Applica.	Sends Attribute information Co.	0	11	0	BRICOWINE.		
	BIGCOMMER_	19950	1170	ATTREETSY.	LICTINGME.	0		1/1/2021 12:00 AV	Net Applica.		Not Applica.	Perform the Artificate Set Spin.	0	0	0	INCOME.		
	BIOCOMMER.	Larry	1100	ATTRACTOR-	SITTINGMG.	0			Not Applica.		Not Applica.	Performs the Attitude Set Syste.	0	G		EGCOMME.		-
	EXCOMMEN_	Lating	\$125	PRODUCTU.	LISTINGMO.			1/1/2021 12:80 AV	Hot Applics.		Not Applica.	Sends Product Listing Informatic	-0		10	ENCOMME.		_
	INCOMMER.	Labrig	3.05	exposition.	USTINOMS.				Not Applica.		Not Applica.	Sends Produkt Listing Informati.	0	Π.	13	BIOCOMME		
	BIGCOMMER	Lating	1100	ASSALABILITY	15TINGME.	5	1.min.m	1/1/2021 12/05 AM	Not Applica		Not Applica.	Sends then Acacularity to BigC.	0	0	0	BISCOMME		
	IGCOMMER_	Sisting .	1200	AG65 ABUTY	LISTINGMG.	52	Leiste .	11/1/2021 12:00	Not Applica.		Not Applica.	Sends free Availability to BigC.	0	0	0	BIGCOMME.		
	TRICOMMER.,	Pulliment	140	2-RPVENTT.	ORDERMIT.	. 6	enaren 1	11/15/0003 30-46	Hot Applics.		Not Applica.	Sands Etigeneni Information to.	-11	E.		BIGCOMME.		
	INSCOMMER.	Pullbrant	140	SHEWENT.	ORDERMIT.		1 minute	11/1/2021 12:00	Not Algrica.		Not Applica.	Sends Shipmant Information to.	0	. [1]	63	BIGCOMME.		
	BIGCOMMER.	Automati	345	SIMPRIOL.	ORDERMOT.	5	t minute	11/15/2021 10:46	Not Applica.		Ret Applica.	Devids Hysice Information to Bi-	11	1	0	RIGCONNE.		
	BIGCOMMER_	fultiment.	145	SINDIAVOL.	CROKINGT.	- 51	Eminute	11/1/102112-00	Net Applics.		Net Applica.	Sends Involue Information to \$1.	0	9	0	INCOMME.		
	EIGCOMMER	Puttinent.	150	SENDCOMP.	ORDERMOT.	5	Finanzie -	11/15/2021 10:46	Hot Applica.		Not Applica.	Sendi Involia hifurrystorchi bi.			-111	DOCOMME.	1,854	RC.
	BIGCONMER	Fallbriet	:50	SENDCOMP.	ORDERMIT.	5	F minutes	11/1/0024 12:00	Not Applica.		Not Applica.	Serial monitor information to BL	-0	10	-11	BISCOWNE.		
	DIGCOMMER	All	340	FGCDNIVE.	ORDERMIST.	51	Liniste .	11/15/2021 1846	Hart Applica		Itel Applica	Renteves Orders hum BigCon	0	Ο.		ERCOMME.	\$415	ūk.
	SIGCOMMER_	AR	240	FIGURANE.	CHEERINGT.	5	t minuter	11/1/2021 12:50	Not Applica.		Not Applica	Remewer Doden from BigCom	0		0	BIGCOMME.	\$4155	άR.
	NOCOMMER	Onter	1410	GENORDERL.	CREEKMET.	- 65	T-minite .	17/15/2021 10:46	Tree	Another Tublement	No Onter	Build EgCommerce Later Onta-	. 10	55		BICCOVME.	6870	41H
	INSCOMMER.	0088	1410	SE3080(RL	ORDERINGT.	5	1,000,00	11/1/2021 12:00	Neo	AnatingFallment	Ro Ooser	Build EgCommerce Sato Ovtra.	13	12	:ED	BIGCOMME.		
	BIGCOMMER_	Order	1420	001040681	ORCEIMST.	5	1.minute	11/10/2021 13:46	New	Awarting Payment	No. Ontee	Build RigConverse Sales Oxde.	- 59	0	0	EGCOVME.	08308	ADR.
	BIGEDAMUER_	Order	1420	GENORDERL.	ORCEMMET.	5	1 misute	11/1/0021 12:00	New	Assatting Payment	No Orber	Build BigCommerce Sales Drde.	- 53		-13	BIGCOMME		
		Weamheaps.	000999	HOUSEKEE	CRIDERMOT.	5	1 minute	71/1/0019 12:00	Not-Appika		Net Apphia	C3M Humainaging and Maint	10					

CSM includes two out-of-the box automation codeunits. The current versions of these codeunits support the creation of <u>multiple job queues</u> 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 BigCommerce* 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 routines are executed is determined by their assigned sequence values.



API Automation Tasks

Channel Sales Manager

CSM

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

API Sales Order List:

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

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

Α		
Field	Description	Example Value
Sales Channel	This should be blank for BigCommerce. CSM uses the API Set to download all	
	BigCommerce Orders for all sales channels tied to the API Set.	
Automation Type	Should always be API.	API
Sequence	The Sequence in the Automation run that Order List information is retrieved.	210
Code	This value is for your reference since the Automation Task uses the API Set Code and the	BIGCOMMERCEORDERLI
	API Set Function Code to determine what to do.	ST
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	ORDERMGTDEFAULT
	the same automation codeunit ID, but you can modify this value if you want to run	
	different groups of automation routines via <u>separate job queues</u> .	
CSM order status	This value is the status of the order assigned by CSM.	In Process
Channel Status Value	This value is Not Applicable for the API Sales Order List.	
BC order status	This value is the status of the order assigned by BC.	No Order
Description	A description of the entry.	Retrieves Count of Orders from
		BigCommerce then runs
		the API function to
		retrieve the Orders
Auto Create SO	This value is Not Applicable for the API Sales Order List.	Not Checked
Auto Release SO	This value is Not Applicable for the API Sales Order List.	Not Checked
Auto Post SO	This value is Not Applicable for the API Sales Order List.	Not Checked

Order Management Setup



Release: 3.4

API Set Code	The BigCommerce API Set to use when executing the Task	BIGCOMMERCE
API Function Code	The API Function Code to Use when executing the Task. This will almost always be SALESORDERLIST for BigCommerce.9 API Sets.	SALESORDERCOUNT
Next Automation Code	This value is Not Applicable for the API Sales Order List.	
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run.	15 Minutes
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 12:00 AM

The Housekeeping Automation

In addition to the automation routines that exist for specific eCommerce activities such as order retrieval, sales order creation, and sending of shipment/invoicing information, CSM includes a "housekeeping" automation. This is a channel and platform agnostic routine that performs maintenance activities:

- Deletion of API messages and their related data buffers according to the API message retention period defined on • the **CSM Setup** page.
- Archiving of CSM orders according to the archiving settings that are defined for each sales channel. •

It is recommended that you schedule the housekeeping automation to occur at a time of low activity. For example, scheduling the routine to run overnight, outside of working hours, helps to ensure that it can perform its functions without impacting user activity.

It is *strongly* recommended that you ensure the housekeeping automation is executed on a regular basis. Failure to run this automation will result in the related tables growing to an excessive size, until eventually it becomes necessary to purchase additional storage space to maintain them.

The standard manner in which the housekeeping automation operates is to identify all records that require deletion/archiving, then commit this deletion/archiving as a single activity. While this is the most efficient way to perform the process, it is important to note that interruptions to the housekeeping when it is running will roll back whatever progress has been made up until that point. For example, consider a scenario where a large volume of records require deletion and the housekeeping automation runs for five hours as it identifies these records. A sudden interruption or abortion of that process will have effectively undone the previous five hours' worth of work.

In scenarios where the housekeeping automation is executed on a regular basis and the volume of records it processes is manageable, the issue described above is not a concern, since the routine should finish within a reasonable timeframe. However, in situations where the volume of records has grown to an excessive amount, the standard behavior of the housekeeping automation makes it difficult if not impossible to clean up this data. In such a scenario, it is possible to modify the standard behavior of the housekeeping automation by making an entry in the Maximum Run Time field. When this field is left blank, the housekeeping automation will run for as long as it needs to in order to address all relevant records. If this field is populated with a duration, however, the housekeeping automation will run for as long as that



specified duration, with each record it encounters being immediately deleted/archived, rather than at the end of the process. In this way, it will take longer to clean up data, but there is no danger of this cleanup being undone or rolled back.

To illustrate how this setting impacts behavior, consider the following scenario. Suppose we have defined a 60 day API message retention period, and we have 30,000 API messages older than 60 days in our database. In this scenario, the housekeeping automation is able to delete 100 messages every minute.

- If we leave the **Maximum Run Time** field blank and execute the housekeeping automation, it will attempt to delete all 30,000 API messages. At 100 messages a minute, it will take 6 hours for this process to finish. The benefit of this process is that if it is able to successfully finish, all relevant records will have been deleted. However, the potential downside is that any disruption will cause all changes up to that point to be rolled back, meaning that all 30,000 API messages will still be present in our database.
- Suppose we instead enter a value of 1 hour in the **Maximum Run Time** field. When we execute the housekeeping automation, it will run for 1 hour. At 100 messages a minute, it will delete at most 6,000 messages. Because it deletes messages one by one, rather than as a single action, any disruptions to the process will not roll back progress up to that point. So if for some reason the housekeeping runs for 10 minutes out of the scheduled hour and is interrupted, the 1,000 API messages it has already run through will remain deleted. The benefit here is that we are definitively able to delete records, with the disadvantage being that it will take more time to fully clean up the data.

Essentially, assigning a maximum run time to the housekeeping automation sacrifices efficiency in favor of slower but guaranteed results.

As stated above, in environments where the housekeeping automation is executed on a regular basis and the volume of records it needs to address at any given time is manageable, the default behavior is preferable. Defining a maximum run time should only occur when the housekeeping automation is unable to finish normally, and it becomes necessary to incrementally reduce the volume of records. In such a scenario, once the volume of records is sufficiently decreased, it is recommended that you remove the maximum run time value and allow the housekeeping automation to resume operating according to its standard behavior.

Configuring Job Queue Entries

While the process of <u>manually running CSM's automation routines</u> 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*.

Channel Sales Manager

CSM For BigCommerce An App by Suite Engine

Order Management Setup Release: 3.4

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 <u>standard</u> <u>Business Central practices</u>.
- 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 BigCommerce channel, except when an order includes an item or items with insufficient inventory. In this scenario, you



Order Management Setup Release: 3.4

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 <u>custom rules</u> 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 <u>scheduled job queue entries</u>. 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 or the Activities section.

Dynamics 365 Business Central	Sandbox Q D @	? 🚺
CRONUS USA, Inc. Posted Documents Sales Orders Sales Invoices Sales Credit Memos This is a sandbox environment for test, demo, or developed	≡ Sales Return Orders Items Customers More ∽ ment purposes only. Don't show this again.	2
New to CSM? Click here to start using Channel Sales Manager.	Actions > CSM > Sales > Reports * CSM Setup Sales Channels * CSM Automation CSM API Sets * Run Order Automation Now	
CSM Sales Channel List Factbox ~	Activities CSM Automation	
Sales Channel	89 89	



Viewing Channel Orders

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

Dyn	amics 365 Business Central			Sandbox	Q	٥	٥	?	A
	CRONUS USA, Inc. Posted Documents -> =								
	Sales Orders Sales Credit Memos Items CSM Chann Sales Invoices Sales Return Orders Customers CSM Setup	el Orders					节	2	
	\times This is a sandbox environment for test, demo, or development purpos	es only. Don't sh	this again.					~	
	New to CSM	Actions							
	New to CSM? Click	> CSM	> Sales	> Reports					
	here to start using								
)	Channel Sales								
	Manager.								
	0.0								
	Insights								
	CSM Sales Channel List Factbox \sim	Activities CSM Automati	on						
	Sales Channel	29	29						

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



Order Management Setup

Release: 3.4

CRONUS USA, Inc.	Posted Docur	nents 🗸	=						
CSM Channel Orders: All ~	,O Search	+ New	🖹 Delete 🚦	Show Documents	ڬ Update Status	🐯 Card	× Delete Select	ed Channel Orders	Relate
Order ID	Sales Channel Code	CSM Order Status	Channel Status	Buyer En	al	Buyer Na	me	Purchose Timestamp	Paymen Timesta
129	BIGCOMMER	Complete	Shipped	sreynold	ts@suiteengine.com	Steve R	eynolds	12/1/2021 1:54 PM	
128	BIGCOMMER	Error	Partially Shippe	id jwang@	archerpoint.com	Jessie V	Vang	11/25/2021 3:06	
127	BIGCOMMER	Error	Partially Shippe	sd jwang@	archerpoint.com	Jessie V	Vang	11/25/2021 2:54	
121	BIGCOMMER	Error	Completed	jessiewi	Decadvance.com	Jessie V	Vang	11/17/2021 9:54	
126	BIGCOMMER	In Process	Awaiting Fulfill	ment jwang@	archerpoint.com	Jessie V	Vang	11/18/2021 10:02	
125	BIGCOMMER	In Process	Awaiting Fulfilli	ment jwang@	archerpoint.com	Jessie V	Vang	11/18/2021 10:02	
120	BIGCOMMER	In Process	Completed	jwang@	archerpoint.com	Jessie V	Vang	11/17/2021 9:43	
119	BIGCOMMER	Error	Awaiting Fulfill	ment chende	son@suiteengine.com	Christin	e Henderson	11/16/2021 2:49	
116	BIGCOMMER	Error	Completed	chende	son@suiteengine.com	Christin	e Henderson	11/15/2021 5:27	
118	BIGCOMMER	Errot	Awaiting Fulfill	ment jwang@	archerpoint.com	Jessie V	Vang	11/15/2021 10:19	
117	BIGCOMMER	Error	Shipped	jwang@	archerpoint.com	Jessie V	Vang	11/15/2021 9:42	
115	BIGCOMMER	In Process	Completed	jwang@	archerpoint.com	Jessie V	Vang	11/15/2021 2:32	
114	BIGCOMMER	New	Awaiting Fulfile	ment jwang@	archerpoint.com	Jessie V	Vang	11/15/2021 1:48	
113	BIGCOMMER	New	Awaiting Fulfille	ment jwang@	archerpoint.com	Jessie V	Vang	11/15/2021 1:38	
108	BIGCOMMER	Error	Completed	jwang@	archerpoint.com	Jessie V	Vang	11/11/2021 5:10	

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

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

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 rerunning 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.

BIGCOMMERCEB20				
Process Update Related Informa	tion More options			
General				
Sales Channel Code	SECOMMERCERS	Purchase Timestamp	11/16/2021 2:49 PM	01
Orde/ ID	115	CSM Order Status	New	
Buyer Email	chenderson@suiteengine.com	Order Status	No Order	
Buyer Name	Christine Henderson	Sales Order No.		
Buuer Phone	1-800-555-1111	Shipment Status	Nothing Shipped	
pagereneral				



Release: 3.4

General Fast Tab

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

CSM Order		È	+	Ŵ	√ Saved	ď	ĸ
BIGCOMMERCEB	2C						
Process Update Related Information	Relate	d Fe	wer options				0
General							
Sales Channel Code · · · · BIGCOMMERCEB2	c ·	\sim	Purchase 1	Timestamp · · ·	11/18/2021 10:02 PM]
Order ID · · · · · · · 126			CSM Orde	r Status	In Process		1
Buyer Email · · · · · · jwang@archerpoir	nt.com		Order Stat	us · · · · · · · ·	Open		
Buyer Name · · · · · · Jessie Wang			Sales Orde	er No. · · · · · ·	CSM-SHP-0000005		
Buyer Phone · · · · · · 6477662538			Shipment	Status · · · · ·	Full Single Shipment		

- **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).
- **BC order status** is a status indicating what CSM found in Business Central that are related order documents. Options are:
 - Awaiting Fulfilment- A Business Central Sales Order Exists with a status of Awaiting Fulfilment.
 - **No Order –** No Business Central Sales Documents were found for this Channel Order.
 - **Open** A Business Central Sales Order Exists with a status of Open.
 - **Released** A Business Central Sales Order Exists with a status of Released.
 - Partial A Business Central Sales Order Exists and some of the items on the order have shipped.
 - **Pending Approval** A Business Central Sales Order Exists with a status of Pending Approval.
 - Pending Prepayment A Business Central Sales Order Exists with a status of Pending Prepayment.
 - Shipped Posted Shipments exist that have completed the order.
- Sales Order No. If the CSM 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.



Note: the **Order Risk** field is reserved for future product improvements. For other supported CSM platforms, it is possible to retrieve order risk information from the connected channel.

Order Lines FastTab

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

											2	14			-	1 Acres 1 1	1.04		(faile		
And America	Council State State	Harvest Inter Street Street	-	-	-	772	100	100	and the second s	bench i	14	ALC: NO.	1100	familiarya.	Press.	14	Posts-	See .	1007	Terry	-
Arringer 1	10001111222	Lote Depte Commen Agentsi.	1.00	\$1.01	1.01	1.0	0.01	608	0.00	40.00					1.0		100				

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

Order Line Options

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

Channel Order	Lines Ma	nage 📥	
} [≭] New Line	🔭 Delete Line	And Order Line Options	🗱 Open in Excel

BIGCOMMERCEB2C · 118 · 20 · Apparel sizes

🗸 Saved 🛛 🖓 🖉

CSM Order Line Options

	Sales Channel Code↑▼	Order ID 🕇 🝸	Order Item ID ↑ 🕈	Name 1	Value
\rightarrow	Commerc ~ :	118	20	Apparel sizes	М
	BIGCOMMER	118	20	BlackFridaySales	24.5000
	BIGCOMMER	118	20	Colors	Silver

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

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



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

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

CSM Order Documents FastTab

Order documents refer to different types of information that may be retrieved or sent between Business Central and BigCommerce for a given channel order. The information on an order document line contains the data that was retrieved from or communicated to the external channel. These records are not manually entered or defined, but rather automatically populated as part of another process. For example, when we initially retrieve an order from BigCommerce, CSM generally creates a payment type order document with details of the payment information for that order. When the related sales order is shipped and invoiced in Business Central, new order documents for the shipment and invoice are added to the CSM order; when the CSM automation is executed, the information on these lines is communicated to BigCommerce, and the related sales order on that platform is updated accordingly.

In addition to payments, shipments, and invoices, order documents are created for a wide range of activities and records including fulfillment, order notes, coupons, sales returns, and refunds. Some of these order document types are common to all eCommerce platforms, others may be unique to a specific one. Depending on process flows, it may be that multiple order documents are created for the same activity. A common example of this can be seen with payments, where CSM will initially add a payment line with payment authorization information when an order is retrieved from a channel, then create a second payment line with instructions to capture that payment when the order is invoiced in Business Central so that this instruction may be sent back to the external platform. Another scenario in which multiple payments could be recorded for an order would be if more than one payment type was used (for example, paying for a portion of the order with a gift certificate, then using a credit card for the remaining amount).

Because the lines on the **CSM Order Documents** FastTab are designed to accommodate a wide range of transaction types, not all fields will be applicable to every order document. For example, the **Channel Payment Method** field would be populated for payment type lines, but remain blank on lines for shipments.

Depending on the order document type, it may be necessary to maintain additional information about related Business Central documents or individual lines on these documents. You can use the **Document Lines** and **Document Transactions** actions on the **CSM Order Documents** FastTab to view any related records for the selected order document.

Order Note Retrieval

The CSM for BigCommerce extension will automatically retrieve any order notes that were entered by the customer at the time of order entry or any user-created notes that were manually entered through the BigCommerce administration portal.



> Order Management Setup Release: 3.4

If there was an issue with the retrieval of order notes at the time of the initial order import into Business Central or additional notes were added to an order in BigCommerce after the CSM order has been created, it is possible to manually retrieve all notes that exist for a BigCommerce sales order by opening the relevant CSM order in Business Central and choosing the **Update** ribbon, then choosing the **Get Order Messages** action.

All retrieved notes are added to the **CSM Order Documents** FastTab. You can view the contents of each note in the **Comment** field.

If you have <u>set up order note placement</u> for your sales channel, CSM will automatically assign retrieved order notes to the CSM order's related sales order according to the setup configuration.

Shipping FastTab

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

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

The ship-to address information in this FastTab will be used to populate the Business Central sales order's shipping information. CSM will always assign the shipping information that has been retrieved from the eCommerce channel to sales orders; addresses that have been defined for the related customer in Business Central (such as the address information on the customer card or any other ship-to addresses) will not be considered.

Invoicing FastTab

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

Currency Code	USD	Amounts	
Charvnel Payment Method		Order Level Shipping Charge	0.00
Silling Address		Order Level Shipping Sales Tax	0.00
sill To Name		Order Level Discount Code	
Ull Ta Address 1	123 Mapple street	Order Level Discount Amount	0.00
III To Address 2		Other Charges Description	
ill To Address 3	Suiteengine	Other Charges Amount	0.00
sili Ta City	Whitby	Other Charges Sales Tax	0.00
lill To State	ON	Chantel Order Total	100.00
ill To Postal Code	M6H 1W2	Order Total Tas	0.00
All To Country	CA		
SII To Phone	4169854205		

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



Order Management Setup Release: 3.4

The **Currency Code** field presents the order currency that has been retrieved from BigCommerce. Depending on how you have configured your sales channel, CSM will either ignore this retrieved value and instead assign the customer's currency to the related sales order, or use your <u>BigCommerce/Business Central currency mappings</u> to assign this currency to the order.

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

CSM presents two order total amounts on the **Invoicing** FastTab. This is due to the way in which BigCommerce handles gift certificates and store credits. Rather than treating these activities as payments, BigCommerce processes them as discounts and reduces the order total. The value in the **BigCommerce Grand Total** field presents the value of the order as it has been retrieved from BigCommerce while the **Channel Order Total** field presents this amount plus any amounts from gift certificate and/or store credit order document lines.

For example, if we have an order with an amount of \$100 and apply a \$25 gift certificate, BigCommerce would record the order as having an amount of \$75. When this order is retrieved into CSM, separate payment lines for the gift certificate amount and the other payment method would be entered in the **CSM Order Documents** FastTab. The \$75 order total from BigCommerce would be entered in the **BigCommerce Grand Total** field, and the \$25 from the order document line for the gift certificate would be added to this amount, resulting in a value of \$100 in the **Channel Order Total** field.



Channel Data FastTab

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

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

Refund Information FastTab

See the section on sending return and refund information to BigCommerce for more information on these fields.

Information FastTab

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

Information			
Purchase Timestamp	7/22/2021 8:53 AM	Imported Time	3:38:29 PM
Payment Timestamp		Acknowledgement Required	
Closed Timestamp		Acknowledgement Processed	
Cancelled Timestamp		Last Acknowledgement Sent	
Last Source Update	7/22/2021 8:54 AM	Last Acknowledgement Result	
Last Import Update	7/27/2021 3:38 PM	Status Text	A Sales Order was built Successfully for External Docume
mported by User ID	ADMIN	Customer	(c17b327f-1676-ad06-bd84-0f85111edbf5)
Imported Date	7/27/2021		

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.



Order Management Setup

г				20			
t	SIGC	OMM	EKCER	2C			
F	rocess	Update	Related Info	ormation	Related Fewer options		
	Sales	order	CSM Order	Updates 🗸	CSMBCOrderDetails ~		
1	Get O	rder Lines	1	BIC	SCOMMERCEB2C	~	
	🖞 Create	e Sales Orde	er 🔪		q	0	
1000	Show	Document					
	Updat	e Status		che	enderson@suiteengine.com		
			1	Ch	ristine Henderson		
	X Resolv	ne error lext			800-555-1111		
	🗙 Resolv	ve Error Text		Cn	800-555-1111		

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

Update Actions

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

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

• Get Order Address: this will instruct CSM to retrieve the order's address from BigCommerce and assign it to the CSM order.



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

Sales Channel Customers

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

CSM Sales Channel	Ø	Ŕ	+	1		
BIGCOMMER	CEB2C					
Listing APIs Actions R	elated Fewer opti	ions				
General						
Code · · · · · · · · · BIGCOMI	MERCEB2C		Descriptio	n · · · · · · · · · · · · · · ·	BigCommerce Reta	il Consumer
Order Management >						
Order Management > Customers					ĥ	
Order Management > Customers Customer Template · · · · · CSMTEM	PLATE		Auto Creat	te Contact ·····	is	
Order Management > Customers Customer Template ····· CSMTEM New Customer Behavi · Auto Cre	PLATE		Auto Creat Default Cu	te Contact		



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.

CSM Sales Channel	Ø	Ŕ	+	<u>ا</u>		2
BIGCOMMERCE	EB2C					
Listing APIs Actions Relate	ed Fewer op	tions				
Customers V Listing V Setup	 Setup_Acti 	ions \smallsetminus				-12
Sales Channel Customers	CEB2C		Descriptio	n.	BigCommerce Retail Consumer	
Add Channel Customer Shows a lit	st of customers link	ked to this S	Sales Channel.			

Customers

MA CLabarriera									laret [=
Sauch + New Thirth	e 🗑 Debte - Autora	Fewer system							- =	7
Internation 1 V	Dave star Case 1	Channel Felt Taken	Diamet Last Hame	Initial Oceanie Facilities	Cent Dis.	Cattorier No.	Cartaet No.	Internal di	Last Roman Lasterte	
+ INGCONVENCENCE	cherolacson@outearigtes.com	Christina	Henderstell			000010	CTODDDJA	10.	11/18/202	11.25
INGCOMMERCIESC	dinocite:@suiteengile.com	David	Reidingung			000030	CT000025	58	11/18/003	1125.

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 a B2B situation where new accounts who register on BigCommerce need to be approved in Business Central before being setup as a customer. In this case, you would manually set up the CSM Sales Channel Customer record and link it to the appropriate Business Central customer (and





optional contact). You would also need to set the Sales Channel Customer External ID to match the ID that BigCommerce sent for the order.

Sending Customers from Business Central to BigCommerce

You can also send customer information to BigCommerce from Business Central:

- 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.

Sending Shipment Information

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

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

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

		1942/01							
CSM Order	Docum	ents Manage							-
Order Document Type ?		Order Document No. 1	Channel Document No	Channel Creation Date	Channel Payment Method	Amount	Secondary Amount	Ournel Ducument Type	Channel Document No
-> Shipmen	6 J	S-SHPT102215				0.00	0.00		
Invoice		PS-INV103215				11,110.00	0.00		

Next, CSM will send the information to BigCommerce, where a corresponding order shipment record is created. This order shipment has its own unique external ID, which is sent back to Business Central, and is assigned to the transaction



on the CSM Order Document Line. As shipments are posted, CSM orders are then assigned a "Shipment Status" of either "Full Single Shipment" or "Full Multiple Shipments." As a separate and final activity, CSM sends an CSM order status of Complete to the relevant order in BigCommerce.

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

Payment Application

Depending on how you have <u>configured your payment methods</u>, CSM may automatically create and apply payment entries in the customer ledger based on payment order document lines on the CSM order as part of the posting process. You can determine whether or not payments have been applied by reviewing the **Unapplied Amount** field for the payment and invoice lines on the CSM order's **CSM Order Documents** FastTab. If no values are present in these fields, then payments have been applied to invoice entries in the customer ledger. If values exist in these fields, then the invoice entries still have a remaining amount.

Retrieving Refunds from BigCommerce

When the **Enable Refund Processing** field is enabled on a BigCommerce sales channel and the corresponding refund setup fields are configured, CSM will automatically retrieve refunds that are entered through your BigCommerce site into Business Central. CSM for BigCommerce includes out-of-the-box automation routines that will automatically create Business Central sales credit memos based on this retrieved data. These automation routines can be configured to automatically post these credit memos, as well. As part of this operation, the related refund and credit memo entries are created in the appropriate customer ledger and are applied to each other (with the exception of "external refunds," as described below).

Note: in order to work with refunds, the following settings for your BigCommerce sales channel must be configured as follows:

- 1. On the **Order Management** FastTab:
 - The Payment Behavior field must be set to Channel.
 - The assigned record in the **Payment Method Code** field must not have an assigned balancing account in Business Central.
- 2. When <u>setting up CSM payment methods</u>, the payment method(s) that will be assigned to orders or refunds must have a defined balancing account in Business Central.

It may be that a discrepancy exists between the amount that is retrieved from BigCommerce and the amount that is entered on the credit memo in Business Central. It is possible to define a refund discrepancy account for a BigCommerce sales channel. If any discrepancies do exist, an extra line for the refund discrepancy account will be added to the sales credit memo, and the discrepancy amount will be assigned to it.

When a refund is created in BigCommerce, it is possible to indicate whether the refunded items will be restocked. CSM supports both scenarios by allowing you to identify both return and "returnless" refund locations for your BigCommerce channels. As part of the refund retrieval process from BigCommerce, CSM obtains the restocking policy. When CSM builds a sales credit memo in Business Central, this value determines which location will be assigned:

• If the refund has instructions to restock items, the sales credit memo will be created for the defined return location.



• If the refund does not have instructions to restock items, the sales credit memo will be created for the defined returnless location.

BigCommerce supports the concept of an external refund method, meaning that a refund can be issued externally against a payment provider. When an external refund is processed in BigCommerce, CSM will still retrieve it into Business Central, create a credit memo based on its information, and (depending on configuration) automatically post it. However, a corresponding refund entry will not be created in the related customer ledger. The end result of this process is an open, unapplied credit memo entry that can be manually applied as needed.

Sending Sales Returns from Business Central to BigCommerce

In addition to being able to <u>retrieve refunds from BigCommerce and then create a credit memo in Business Central</u>, it is possible to initiate a return order from Business Central and then send this to the corresponding order on your external BigCommerce platform.

CSM Setup

It is recommended that you set up return reason codes that you can assign to the return order lines you generate for your BigCommerce orders. Return reasons are a standard Business Central feature that allow you to categorize and track the reasons for why items are being returned, such as "defective," "wrong item shipped," or "customer dissatisfaction." As part of setting up each reason code, you can indicate the location to which returned items will be received.

It is also necessary for you to enable refund functionality for the sales channel via the following fields on the **Order Management** FastTab of the **CSM Sales Channel** page:

- Send Refund Cr. Memo: enable this field to indicate that you want to send refund credit memo information from Business Central to BigCommerce.
- Send Refund Cr. Memo When: select the method by which credit memo information will be sent to BigCommerce.
 - o Immediate: will send automatically when the return order/credit memo is posted.
 - *Scheduled*: will be sent when the SENDCREDITMEMO automation runs.
 - *Manual*: will be sent when the user checks the **External Requires Update** field on the CSM order document line and uses the **Send to Channel** action on the **CSM Order** page.

Note: the **CSM Sales Channel** page also includes **Return Order Behavior** and **Return Receipt Behavior** sections. These setup options exist for integrations to other eCommerce channels. The concept of a return order does not currently exist within BigCommerce, and these fields can be ignored for your BigCommerce channels.

BigCommerce also provides a number of different ways in which a refund payment can be processed. You can define the default method for both customers and guests on the sales channel:

- **Customer Refund Payment Selection Method:** select the default payment method for refunds that are created from customer orders, which in this instance refers to customers who have set up an account on your BigCommerce platform.
 - Original Payment Methods: refunds will be paid out to the payment method that was used for the original sales order. For example, if a sales order was paid with a credit card, the refund would be made to that credit card's account.



- *Manual Selection:* users will manually choose the way in which refund payments are made on an orderby-order basis.
- Store Credit Only: refunds will be paid as store credit to the customer's account in BigCommerce.
- *Offline/custom:* information about the refund will be communicated to BigCommerce, but BigCommerce will not process the transaction. In this scenario, the refund must be processed through an external activity (directly through the payment provider, for example) or via a custom extension.
- Guest Refund Payment Selection Method: select the default payment method for refunds that are created from guest orders, which in this instance refers to customers that have not set up an account on your BigCommerce platform. The options for this field are the same as those for the Customer Refund Payment Selection Method field, with one exception being that *Store Credit Only* is not an option. This is because BigCommerce does not permit store credit for guest customers.

Creating and Releasing Return Orders

You can generate a sales return order from any CSM order that has been fully or partially shipped. CSM will not allow you to create a return for any CSM orders that have not been shipped. CSM will also not allow you to create a return order if the **External Requires Update** field for any shipment or credit memo order documents on the related CSM order is set to *True*. This will prevent the creation of a return for an order that has not been properly shipped or credited.

- 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.

Business Central's standard **Copy Sales Document** page is displayed. This page is automatically configured to copy the related order's sales document, so it should not be necessary to change any values.

- 3. Choose the **OK** button. 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.
- 4. On the **Sale Return Order** page, in the **Channel Sales Manager** FastTab enter a **CSM Return/Refund Reason** (some examples are, damaged, wrong size, wrong color, wrong style, etc.).
- 5. Make any necessary adjustments on the return order lines.

Note: if you wish to perform a partial return, you must reduce the value in the *Quantity* field for the relevant return lines accordingly. Adjusting the quantity to receive, rather than the quantity, will result in an incorrect refund amount begin calculated by BigCommerce.

- 6. In the **Return Reason Code** field for each line that will be returned, enter or use the AssistButton to assign a return reason.
- 7. Once you have finished entering the necessary information on the return order, choose the **Release** action in the ribbon.

Attempting to release the return order will validate it against the related CSM order to ensure that the two documents are in sync (the order hasn't already been returned, order quantities are correct, etc.). If any discrepancies are detected, the release process will error and a message will instruct the user as to where the inconsistency lies:

Order Management Setup

Release: 3.4





If the release process is successful, the related CSM order's refund status will be updated to Pending, and its sales return status will be updated to Released.

Regardless of whether the release process was successful, a new sales return order document line will be entered on the **CSM Order Documents** FastTab of the related CSM order. This line contains information about the return order. In addition, if the release process produced an error, the text of the error message can be reviewed in the **Last External Update Result** field.

Selecting Payment Methods and Posting Return Orders

Depending on what <u>refund payment selection method has been defined for your BigCommerce sales channel</u>, it may be necessary to choose the payment method you want to use for the refund before you can post it. Payment methods can be defined for both customer and guest orders, which in this instance refers to those customers who have set up an account on your BigCommerce platform versus those who have not. The **Guest Customer** Boolean on the **Channel Data** FastTab of the **CSM Order** page indicates whether an order is a guest order; this setting will determine whether CSM applies the channel's customer or guest refund payment method.

If the selected refund payment method for the CSM order is *Manual Selection*, you must manually select the payment method(s) that you want to use; if you attempt to post the sales return without selecting a payment method, an error message will be presented instructing you to do so. If you have any other payment method type selected, CSM will automatically attempt to select the relevant payment methods at the time of posting, meaning that you may proceed to posting the sales return. You can, however, choose to manually select different payment methods if you wish.

To select refund payment methods:

1. On the **Sales Return Order** page, choose the **Actions** ribbon, then select the **Functions** group and choose the **Select Refund Payment Methods** action.

The **Refund Payment Method Selection Worksheet** page presents the payment methods that are available for selection. The number of available payment methods depends on the way in which the original transaction was processed. The final line in the list of available payment methods will always be the *custom* option for the full amount of the refund, meaning that you can always choose to instruct BigCommerce to not process a payment method because you wish to do so offline/externally.

If a gift card/certificate was used to pay for some or all of the original sales order, there are certain rules as to how it may be refunded:

• If the order is a customer order, gift certificate refunds can be recorded to store credit or handled as a custom, offline option.



- If the order is a guest order, gift certificate refunds can only be handled as a custom, offline option (remember that it is not possible to process refunds to store credit for guest orders).
- 2. Place a check mark in the **Selected** field for the payment method(s) you want to use for the refund. The total value of the selected payment selection worksheet lines must equal the order balance.
- 3. Choose the **Close** button.

Note: the Total Selected Payment field for the sales return order document line on the CSM Order Documents FastTab of the related CSM order will present the amount that has been selected for payment on the Refund Payment Method Selection Worksheet page. If this amount does not equal the total payment amount of the sales return, it will be presented in red; if the values match, it will be presented in green. Again, it should be noted that CSM will automatically attempt to select payment methods if your channel is configured to use anything other than manual payment method selection, meaning that the presence of a zero value in the Total Selected Payment field may not be an issue.

4. You can now post the sales return. Choose the **Post** action in the ribbon.

This will perform the standard Business Central activities that occur whenever a sales return order is posted:

- The sales return order is deleted and posted return and credit memo documents are created. The CSM return/refund reason that was specified on the sales return will be copied to these archive documents.
- An inventory adjustment for the return amount is made to the specified location, along with the related item ledger entries.
- A new credit memo entry for the refund amount will be entered in the customer's ledger.

In addition, the following adjustments are made to the related CSM order:

- New credit memo and return receipt order document lines will be entered on the **CSM Order Documents** FastTab.
- The CSM order's refund status will be updated to Complete.
- The CSM order's sales return status will be updated to Posted.
- In the Sales Channel Order Statistics FactBox, the outstanding return order amount, posted shipments, and total amount credited values will be updated accordingly.

Sending and Retrieving Refund Information from BigCommerce

After the sales return order is posted, CSM will send credit memo information to BigCommerce. The manner in which this is sent depends on the selected value in the **Send Refund Cr. Memo** field on your BigCommerce sales channel:

- *Immediate*: will send automatically when the return order/credit memo is posted.
- *Scheduled*: will be sent when the SENDCREDITMEMO automation runs.
- *Manual*: will be sent when the user checks the **External Requires Update** field on the CSM order document line and uses the **Send to Channel** action on the **CSM Order** page.

After CSM communicates this information to BigCommerce, BigCommerce will process/issue the refund according to the sales channel's refund payment method. Depending on the seller's balance on BigCommerce and other factors, this process may not be instantaneous.



When BigCommerce does issue the refund, this activity will be retrieved into Business Central by CSM the next time the order automation routines are executed. Retrieving this refund information results in the following activities:

- A new refund entry is entered in the customer's ledger. This entry is applied to the related credit memo entry.
- The CSM order's channel status value will be updated to refunded.
- A new refund order document line is entered on the **CSM Order Documents** FastTab.
- The **Refund Reference** field on the related CSM order is populated with a reference number that is obtained from BigCommerce.

Archiving Channel Orders

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

CSM Setup

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

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

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

Sales Channel Setup

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

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

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



enter a greater value if you want to archive your orders on a less frequent basis. It is not possible to define an archive period of less than 30 days.

• Auto Channel Order Archive: enable this option to instruct Business Central to automatically archive CSM channel orders that meet the appropriate criteria.

Housekeeping Automation Setup

CSM uses the existing "housekeeping" automation record to archive completed and cancelled channel orders. To view a list of CSM automation records, choose the size 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
02/25/202103/25/2021	Less Than 30 Days	No
02/24/2021	Equals 30 Days	Yes
02/23/2021	Greater Than 30 Days	Yes

Viewing Archived CSM Channel Orders

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

Archived CSM orders contain the same layout, FastTabs, FactBoxes, and fields as active CSM orders. You can also view any existing order line option 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:



Order Management Setup Release: 3.4

- 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.

Role Center Cues

A number of cues have been added to the <u>CSM Role Center</u> to assist in identifying issues with various CSM records that fail to process or have some sort of outstanding issue. These cues are found in the **Requires Attention** section of the CSM Role Center:



> Order Management Setup Release: 3.4

Requires Attention	
Orders with Errors	Outstanding Orders to Channel
34	7
> <u>See more</u>	>See more
Outstanding Listings to	Delayed Automation
40	11
>See more	>See more

Choosing one of these values will open a separate list of the records in question.

These cues present the following information:

- **Orders with Errors:** this cue presents a list of all CSM orders with an order status of *Error*. You can use this information to identify orders that have failed to process for any reason.
- Outstanding Orders to Channel: this cue presents a list of all CSM order documents whose External Requires Update field is checked. Typically, when a CSM order document is created, it is then automatically synchronized with the connected eCommerce channel. If this synchronization is successful, CSM will automatically remove the check mark from the External Requires Update field. Accordingly, the records listed as part of this cue can be used to identify those CSM order documents that failed to synchronize with the connected channel. In addition to being able to access a particular CSM order from a selected line, you can also directly process one or more lines by selecting them, then choosing the Actions ribbon and choosing of the available options:
 - Send to Channel: CSM will attempt to re-send the selected order documents to the connected channel.
 - Set External Requires Update to FALSE: the check mark in the External Requires Update field for the selected order documents will be removed.
- Outstanding Listings to Channel: this cue presents a list of all CSM listings whose External Requires Update field is checked. When a CSM listing is created and then successfully sent to a connected eCommerce platform, CSM will automatically remove the check mark from the External Requires Update field. Accordingly, the records listed as part of this cue can be used to identify those CSM listings that failed to send all or a particular piece of information to the connected channel. It is important to understand that the External Requires Update field is checked whenever a new CSM listing is created or a change is made to it that requires an update, meaning that a CSM listing with this setting enabled may not necessarily be "problematic," but rather awaiting an update.
- **Delayed Automation:** this cue presents a list of all CSM automation routines whose scheduled frequency exceeds their last run timestamp. For example, an automation routine with a scheduled frequency of 1 hour and a last run



timestamp of 08/01/20203 9:00 AM would be considered delayed at any point after 10:00 AM on 08/01/2023. You can use this information to determine whether certain processes are being executed as expected.

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.



Release: 3.4

CSM Additional Details

CSM API Data

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

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

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

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

3



> Order Management Setup Release: 3.4

Appendix A: Working with the BigCommerce API Reference Tool

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

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

As stated above, a BigCommerce record's ID is generally not of value to the end user. As such, record IDs are not readily visible or accessible from within BigCommerce. In some instances, it is possible to obtain this information by opening the record in BigCommerce and deriving the ID from the URL. In other scenarios, however, this is not an option. CSM typically recommends the use of a tool such as <u>Postman</u> that can retrieve this information from an eCommerce platform. However, in the case of BigCommerce, an out-of-the-box API reference tool is also available. This tool can be accessed at <u>https://developer.bigcommerce.com/api-reference</u>. The various types of BigCommerce record you can obtain are presented on the left-hand side of this page. In some cases, a category may present a list of subcategories. For example, the *Catalog* option expands to allow you to select records such as products, product variants, etc.

Selecting a record type will present a list of available request options. When you choose a request type, the API reference tool presents information about the request, including the different parameters you can specify. You can enter parameter and authorization information in the area on the righthand side of the page. Mandatory parameters are indicated with an *. The specific mandatory values will vary from request to request, but you will always need to provide the **store_hash** and **X-Auth-Token** values:

Get All Tax	Classe	S		
GET https://apl.bl	gcomerce.com/s	itores/{store_hash}/v2/tax_classes		
Returns a list of all Tax C	lasses in a store.		→ Auth	
Default sorting is by tax	class id, from lo	west to highest.	X-Auth-Token :	
Request			Parameters	
✓ Security: API Key			store_hash* :	
OAuth Scopes	PERMISSION	SESAMITE	limit : number page :	
Information & Settings	modify	store_v2_information	Accept*	
Information & Settings	read-only	<pre>store_v2_information_read_only</pre>	application/json Content-Type*	P
Headers				
HEADER BARARA	eten pesa	RETION	Send API Raquest	



Release: 3.4

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

After you have assigned the necessary parameters, you can choose the **Send API Request** button to instruct the API reference tool to present a list of values from your BigCommerce platform according to the established parameters.

Y



Appendix B: 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.

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

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

CSM For BigCommerce



Order Management Setup

Release: 3.4



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

Xx

Order Management Setup

Release: 3.4



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.

Appendix C: API Credentials & Sales Channel Data

API data refers to the information that is passed between different software programs or systems. In Business Central, an API allows external systems to access and manipulate data within the Business Central system. This allows for seamless integration between different systems and automation of tasks.

API credentials in Business Central refer to the information that is needed to authenticate and authorize access to the Business Central API. This information typically includes a unique key or token that identifies the system or user attempting to access the API, as well as any additional information required to authenticate the request.

In Business Central, API credentials are typically managed using security keys, which are unique identifiers that are used to authenticate and authorize access to the API. They are generated and managed through the Business Central administration interface.

It is important to keep API credentials secure as they provide access to the data and functions of the system, so they should be kept confidential and not shared with unauthorized parties.

Test channel communication is a way to test the communication between different systems before going live with the integration. It allows developers to test the API and ensure that it is functioning properly, and that the data is being passed correctly. This can help identify and fix any issues before they affect live operations.

In cases where API or Sales Channel data is altered, it can determine the type of message Business Central will give users based on actions performed. For example, in BigCommerce, if the "API Key Value" field is blank in your API Credentials, then when the Test Communication action is run on the CSM Sales Channel page it will display a message stating that the *API Key Value is invalid (unrecognized credentials)*. Once the Bearer Token is entered into the API Credentials, then the Test Communication in the CSM Sales Channel will display a message stating that the *communication test has succeeded*. The overall outcome should be that when an error message occurs within altered API Credentials or Sales Channel data then the Test Communication message should fail. If the data is good, then the Test Communication message should pass.