



CSM FOR MAGENTO

An App by Suite Engine
Microsoft Dynamics 365 Business Central

Order Management Setup

Version: 3.2

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ORDER MANAGEMENT SETUP

CSM for Magento 3.2 (D365 Business Central Version: Platform 22.0.57537.0+ Application 22.1.55890.56216)

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

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

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Introduction

CSM for Magento is an out-of-the-box integration between Microsoft's Dynamics 365 Business Central ERP software and the Magento (re-branded as "Adobe Commerce") platform. This integration allows online retailers to keep the ERP business software they use to run their business in sync with their online marketplace(s). Automated processes are used to create Business Central sales orders in response to Magento marketplace activity, as well as update these orders and other related records as new information is recorded in either system.

A Note on Magento

In 2015, Magento introduced a new version of its platform ("Magento 2") as a modern replacement to its legacy offering ("Magento 1"). For some time, any company getting started with Magento would do so on the Magento 2 platform. However, there are still many companies that initially set up their eCommerce environment with Magento 1 and are continuing to use this legacy product today.

CSM for Magento can be deployed in both Magento 1 and Magento 2 environments and includes separate API sets for both version. When you are in the process of [setting up a new sales channel](#), CSM will prompt you to specify the Magento version you want to use. Based on this selection, CSM will assign the relevant API set to the new sales channel.

Note: *Magento officially stopped supporting Magento 1 on June 30, 2020. While CSM for Magento can be deployed in a Magento 1 environment, active development of new CSM features and functionality for Magento 1 does not take place. In addition, Suite Engine at some point will cease Magento 1 validation activities, meaning that new product changes will have the potential to break or limit functionality in Magento 1. It is highly recommended that you consider upgrading your Magento 1 environment to Magento 2.*

For more information on the differences between Magento 1 and Magento 2, please see [here](#).

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 Magento Extension

The CSM for Magento 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 Magento*: this facilitates communication between CSM Core and an external Magento 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.
5. Close the **Extensions Settings** page and repeat this process for the other CSM extensions:
 - *Channel Sales Manager for Magento*
 - *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.

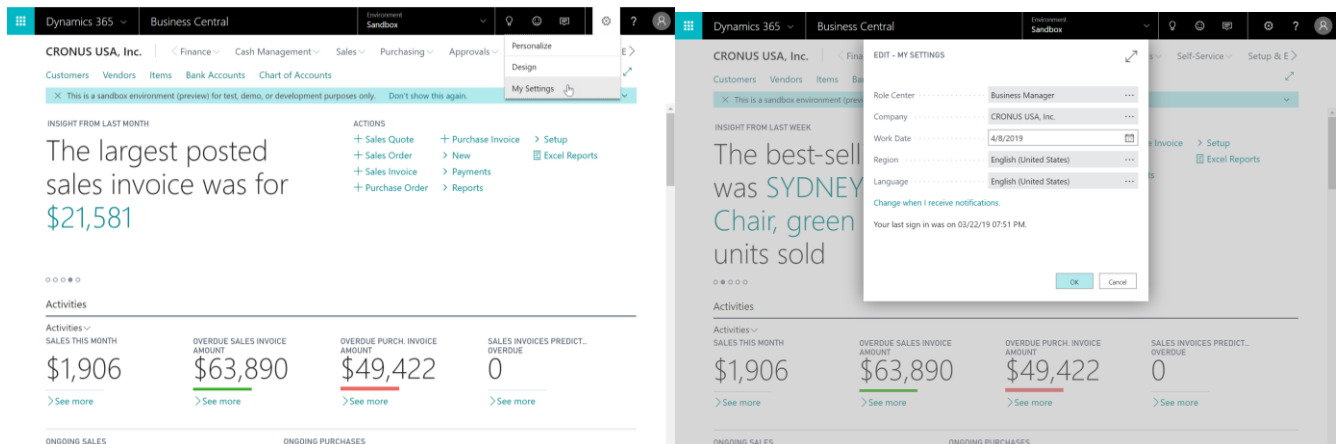
The process of assigning CSM permissions is no different than the assignment of standard Business Central permission sets. For guidance on best practices for assigning permissions sets, see [here](#).

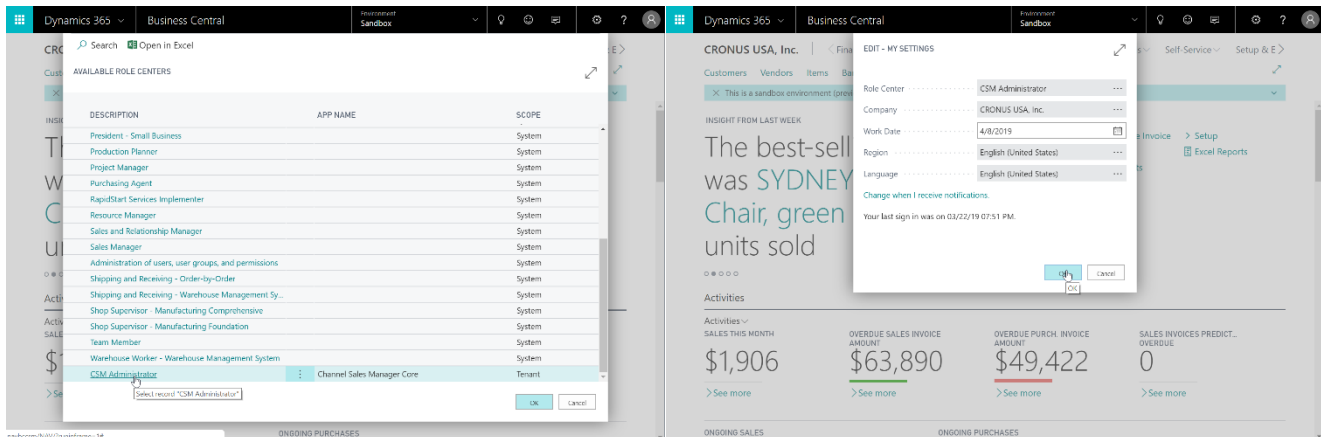
CSM Role Center

CSM provides a Role Center with content specific to CSM functionality. It is recommended that this Role Center be enabled to best understand this setup documentation.

To enable the CSM Administrator Role Center:

- Logon to Dynamics 365 Business Central and ensure that your company is set correctly.
- Search for "My Settings" or go to the Gear in the upper, right-hand corner and choose "My Settings" and change your Role Center to "CSM Administrator".






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

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

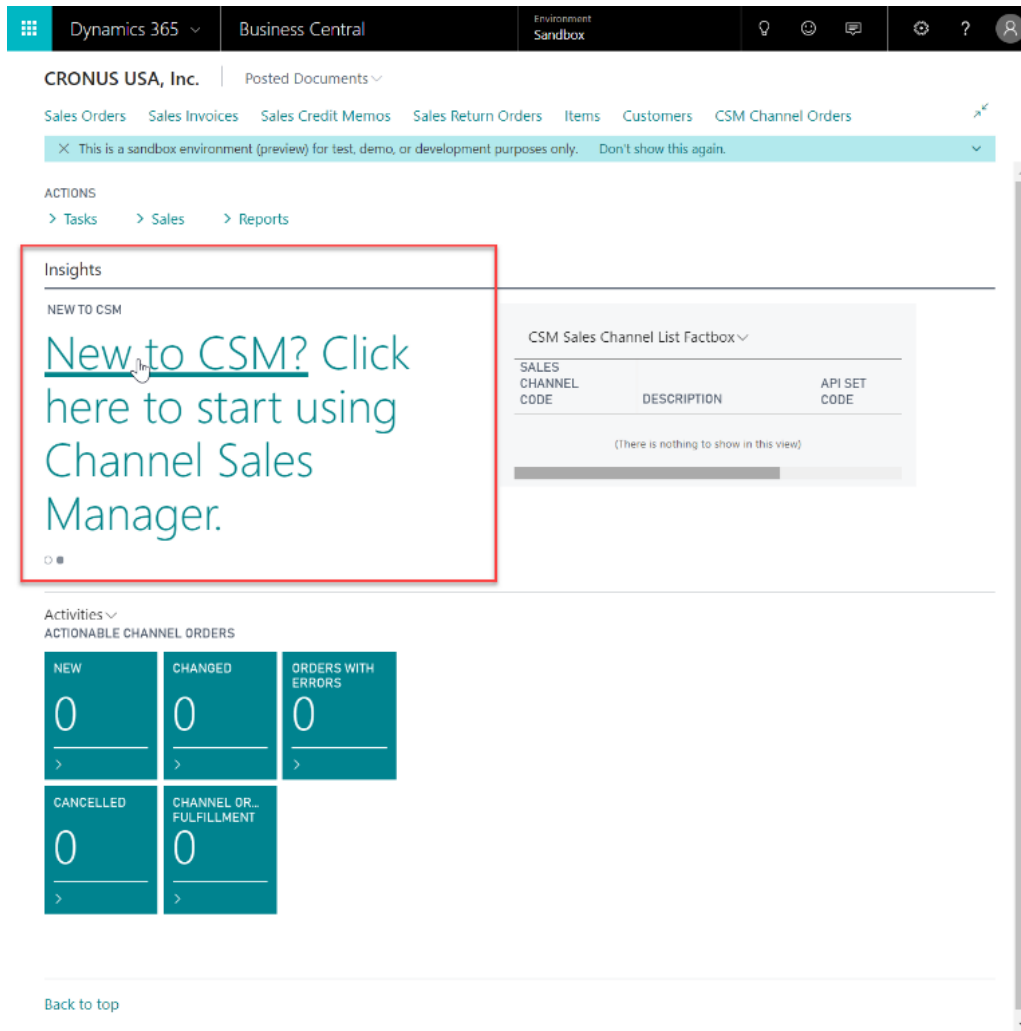
CSM Setup

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

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

- Choose the  icon, enter **CSM Setup**, and then choose the related link.
- From the CSM Administrator Role Center, choose the **CSM** menu option, then choose the **CSM Setup** action.
- 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.



The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.' in a 'Sandbox' environment. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Environment Sandbox'. Below the navigation, there are tabs for 'Sales Orders', 'Sales Invoices', 'Sales Credit Memos', 'Sales Return Orders', 'Items', 'Customers', and 'CSM Channel Orders'. A notification banner states: 'This is a sandbox environment (preview) for test, demo, or development purposes only. Don't show this again.' The 'ACTIONS' section shows 'Tasks', 'Sales', and 'Reports'. The 'Insights' section is highlighted with a red box and contains a message: 'NEW TO CSM' followed by 'New to CSM? Click here to start using Channel Sales Manager.' To the right of this message is a 'CSM Sales Channel List Factbox' table with columns 'SALES CHANNEL CODE', 'DESCRIPTION', and 'API SET CODE'. The table is currently empty, with the text '(There is nothing to show in this view)'. Below the insights, there is an 'Activities' section for 'ACTIONABLE CHANNEL ORDERS' with five cards: 'NEW' (0), 'CHANGED' (0), 'ORDERS WITH ERRORS' (0), 'CANCELLED' (0), and 'CHANNEL OR... FULFILLMENT' (0). A 'Back to top' link is at the bottom left.

Creating and Managing Your CSM Subscription

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



After the initial entry of billing details on the CSM Setup page, these values become uneditable. 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 value such as the customer name, address, e-mail, and phone number, choose the Edit Customer Information action in the ribbon. This will open a separate window containing the existing customer values, which can then be edited. Changes that are made to a customer's information will be automatically synchronized with the related CSM subscription account in Stripe.

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

Enabling and Receiving CSM Notifications

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

To enable CSM notifications:

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

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

To take action against a CSM upgrade notification:

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

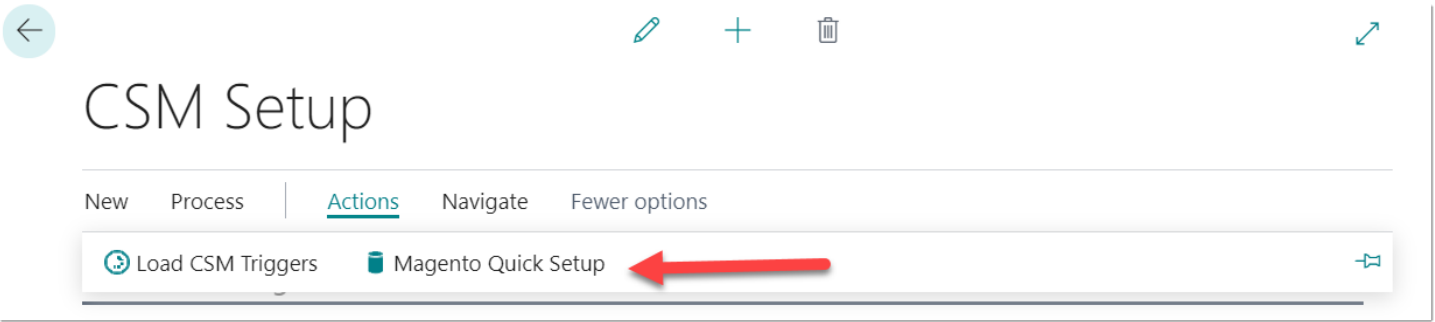
CSM will automatically record the date, time, and user who marked the action as having been taken. If any upgrade notifications are not completed in this way, the designated CSM notifications users in your organization will continue to receive upgrade notifications alerts in their role centers when accessing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

The CSM for Magento Setup Wizard

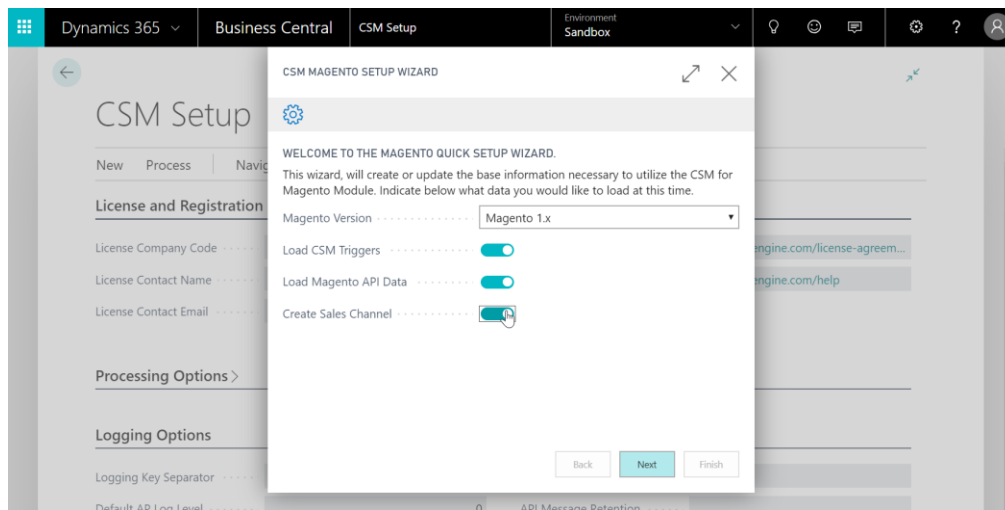
Once you have set up a trial subscription, you are ready to set up your CSM for Magento solution. To assist you in the creation of your primary sale channel, CSM for Magento includes a setup wizard that streamlines the setup process.

***Note:** if your online retail business is comprised of multiple marketplaces, and you want to create a separate CSM sales channel for each one, it is recommended that you manually set them up. This will ensure that the credentials you established during the setup of your primary sales channel are not inadvertently overridden or deleted.*

Select Actions -> Magento Quick Setup.

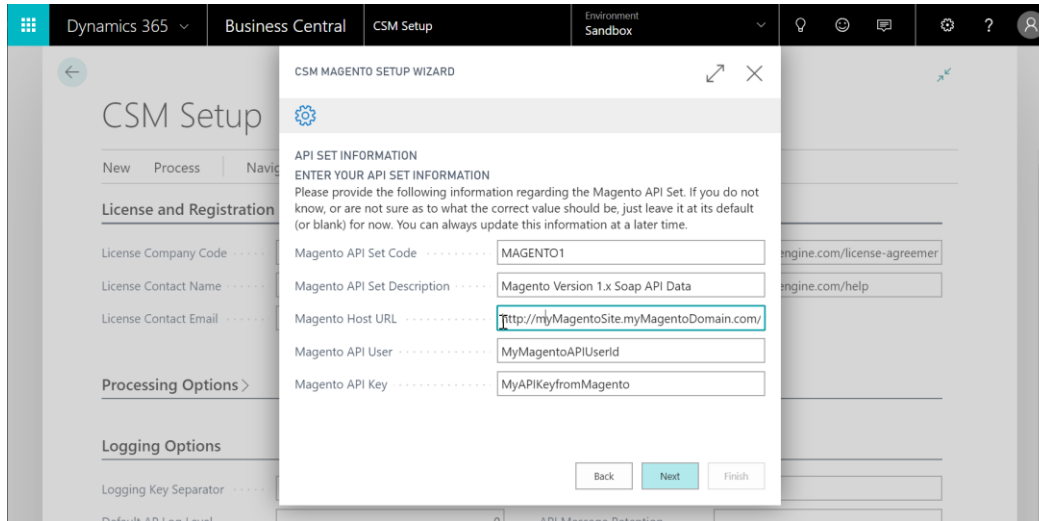


This will start the Magento Setup Wizard.



On the first page of the wizard, in the **Magento** field, use the dropdown to indicate whether you are using the Magento 1 or Magento 2 platform (see [here](#) for more information on these platform versions). After you have specified the web service type, it is recommended you enable all presented setup options for loading CSM triggers and Magento API data, as well as creating a new sales channel in Business Central. When you are done making these selections, choose the **Next** button.

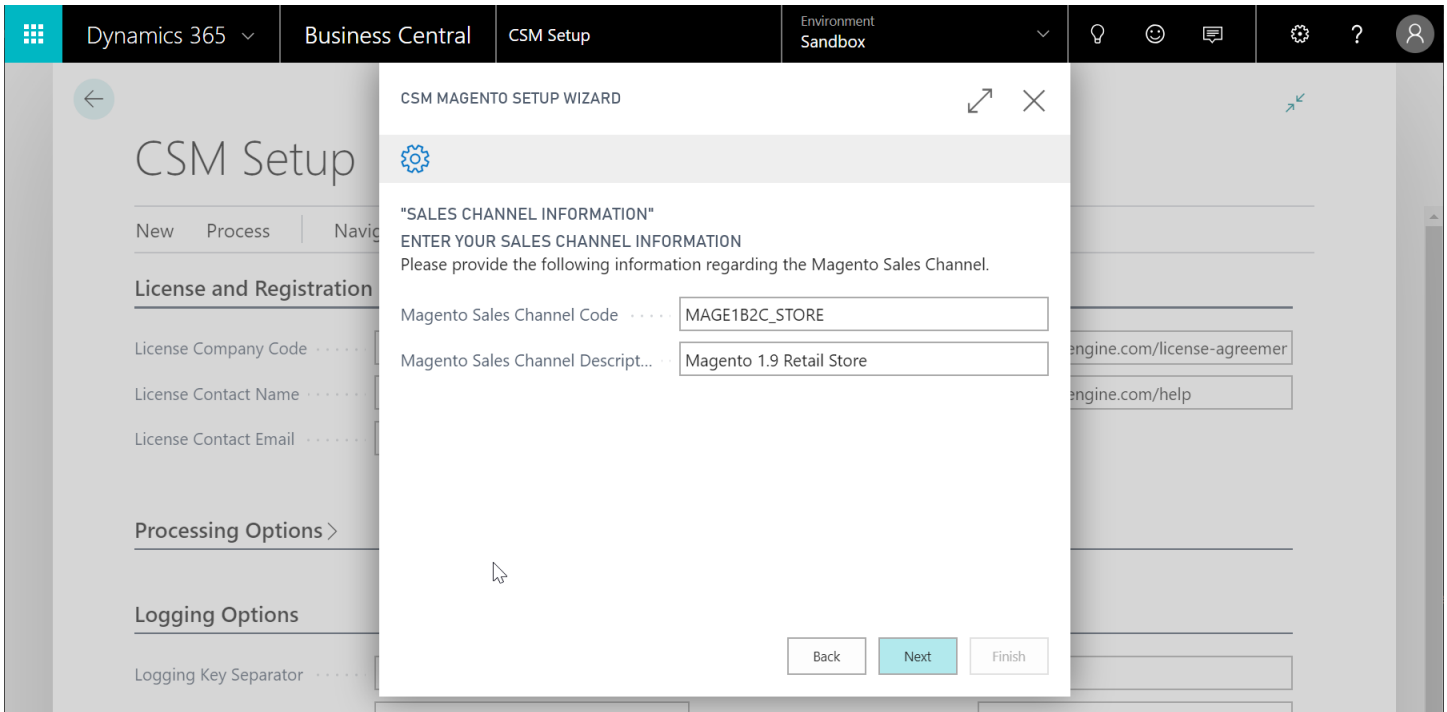
On the second page of the wizard, you can specify information about the API set you are using to facilitate communications between Business Central and your external channel platform. For more information on how to retrieve this information, choose the **How to obtain credentials** button.



The specific configuration field options will be determined by the web service type that you selected on the previous wizard page:

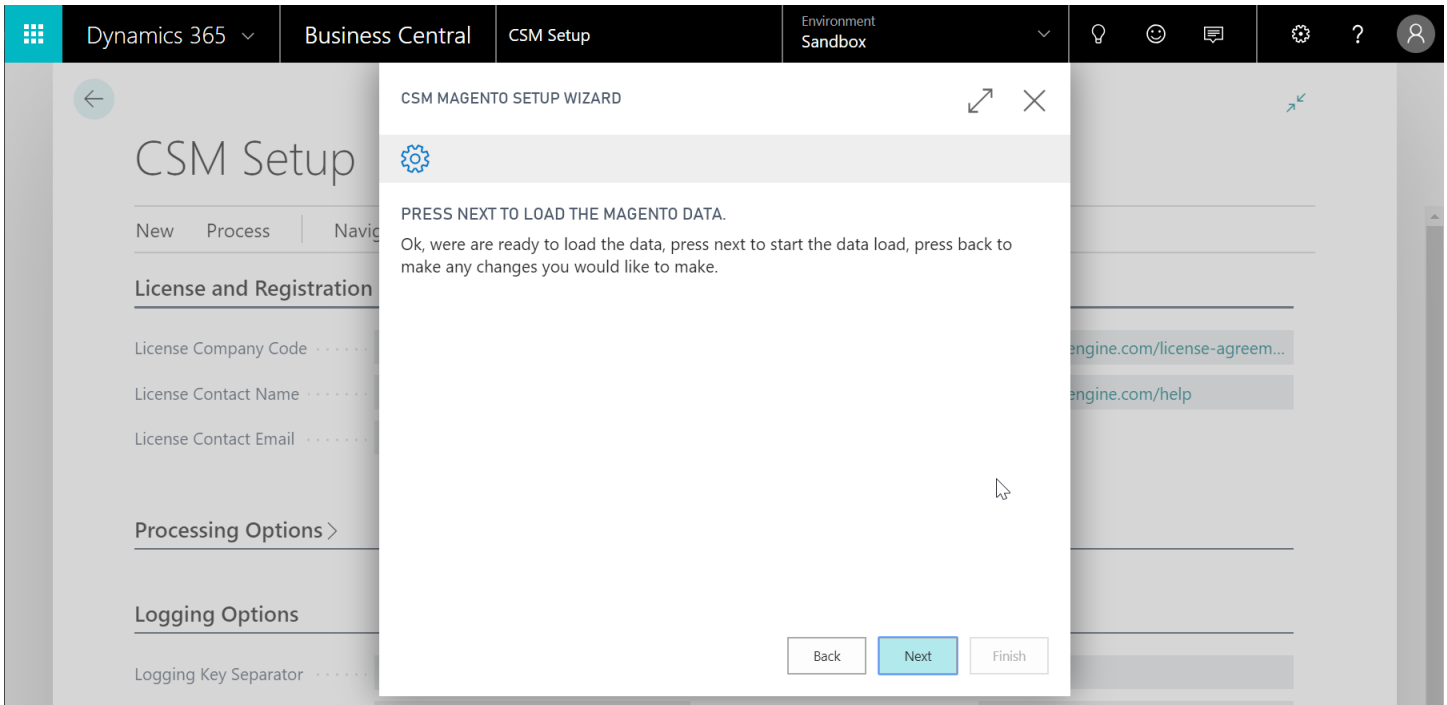
Field	Description	Platform Type	Example Value
Magento API Set Code	This is a code that identifies the API set. It can be any value you wish, but we recommend naming it something meaningful that describes the external source the API set communicates with.	Both	MAGENTO1
Magento API Set Description	This 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 (Magento, Magento 2.xx, Amazon, etc.) and may even require a 2 nd API set for an additional Magento 1.x instance you may deploy.	Both	Magento version 1.96 Soap V2 API
Magento Host URL	This is the host URL endpoint for soap services on your Magento 1.xx server. Normally it is your Magento store URL with an additional path of /api/v2_soap/index/	Both	http://mymagento.mycompany.com/api/v2_soap/index/
Magento API User	This is the Magento Soap/xml-RPC user that CSM should authenticate its API Calls with. See below example Magento screen shot. This user should be assigned a Magento user roll that gives it access to all API's.	Magento 1	Use the Soap/xml-RPC User you setup on Magento
Magento API Key	This is the Magento Soap/xml-RPC users API Key which CSM authenticates API Calls with. See below example Magento screen shot.	Both	Use the api key you defined on Magento for the User ID

On the third page of the wizard, you will specify how you want to identify your Magento channel.



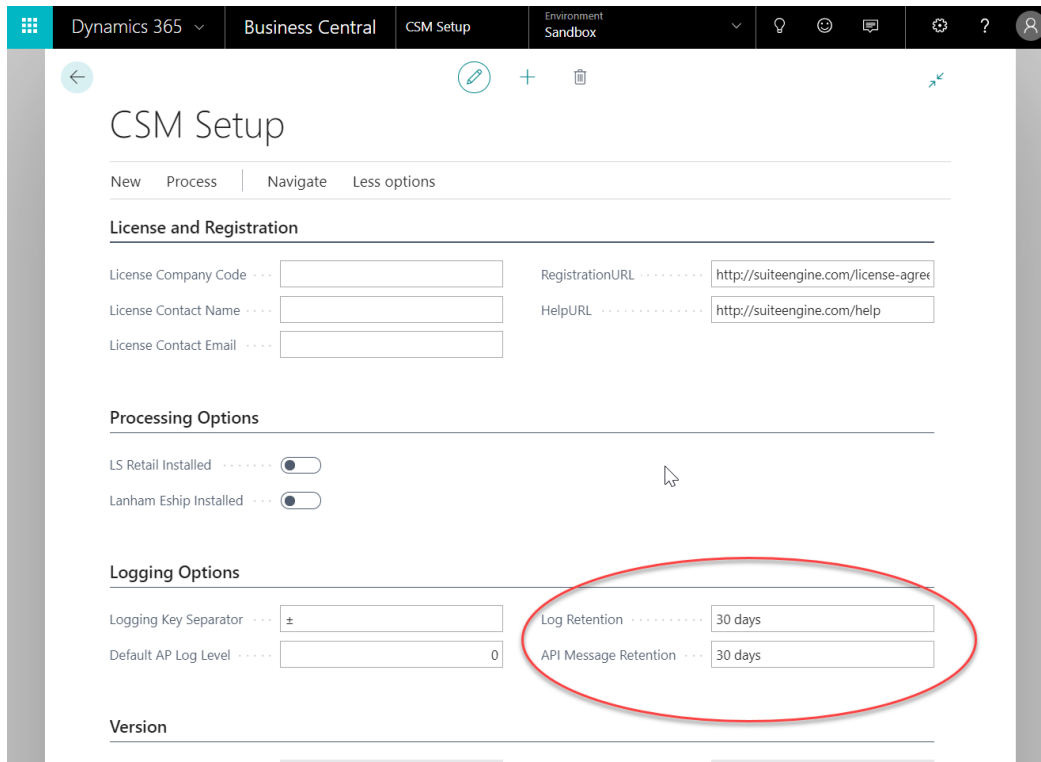
Field	Description	Example Value
Code	This is unique code that identifies the Sales Channel. It can be any value you wish, but we recommend naming it something meaningful that describes the Sales Channel.	MAGENTO_B2C
Description	This is a text description of the Sales Channel.	Magento Retail Store (B2C)

The fourth page of the wizard is a confirmation page. Choose the **Next** button to instruct CSM to load and configure Magento channel. You can choose the **Back** button if you need to make changes to any entered settings.



Press “Finish” on the Final Page and the Wizard will close.

There are two values on the CSM Setup page that you should set. These determine how long API message information and logs are retained.



The screenshot shows the 'CSM Setup' page in Dynamics 365 Business Central. The page is divided into several sections:

- License and Registration:** Includes fields for License Company Code, License Contact Name, License Contact Email, RegistrationURL (http://suiteengine.com/license-agree), and HelpURL (http://suiteengine.com/help).
- Processing Options:** Includes toggle switches for 'LS Retail Installed' and 'Lanham Eship Installed'.
- Logging Options:** This section is highlighted with a red oval. It contains:
 - Logging Key Separator: ±
 - Default AP Log Level: 0
 - Log Retention: 30 days
 - API Message Retention: 30 days
- Version:** A field at the bottom of the page.

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

Obtain Channel Credentials in Magento

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

An API access key is a pair consisting of an **application ID** and an **application secret**. Use an API access key to obtain a [session token](#). The **session token** is used when calling the [REST endpoints](#). You decide the lifespan of your API access key: you can regenerate it as often as you wish, or you can choose to delete it. API access keys are specific to each **Marketplace Developer Portal** environment. API access keys generated for the **sandbox** cannot be used for **production**, and vice-versa. For each **Marketplace Developer Portal** environment, you have a limit of three (3) API access keys.

1. Log in to the Magento Admin Portal
2. On the navigation panel to the left of the page click **System**. Then click **Integrations**.
3. Click **Add New Integration** for creating a new integration. To view credentials for existing integrations simply click **edit** for the integration you wish to view or change.
4. For adding a new integration under the **Basic Settings** in the **Integration Info** tab, fill in the required fields.
5. Once all required fields are completed click the **drop-down option** on the **Save** button to Save & Activate. From there, you will be granted credentials for

- Consumer Key
- Consumer Secret
- Access Token
- Access Token Secret

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.

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

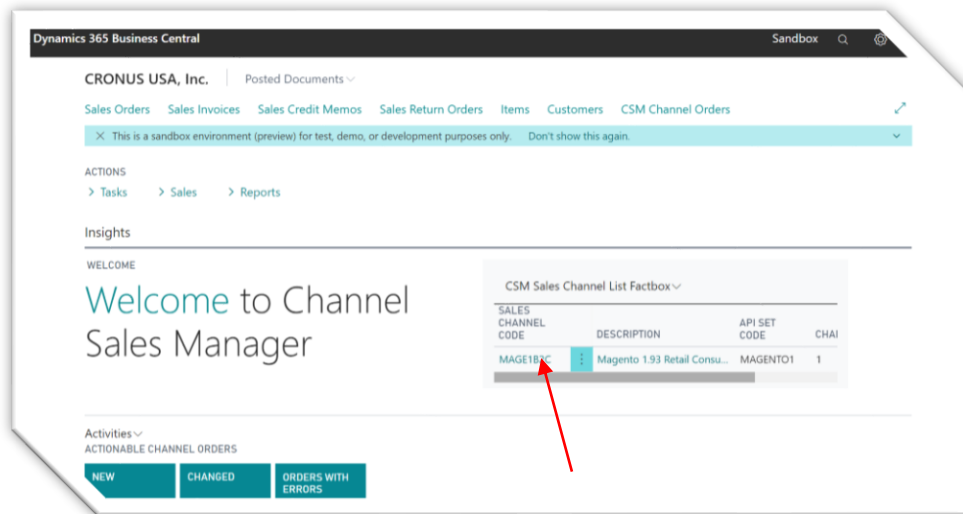
Note: “API Endpoint URL” and “Bearer Token” which are the two main credential fields that are recommended to be setup during the CSM Setup process. Think of its function as a password or access key.

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

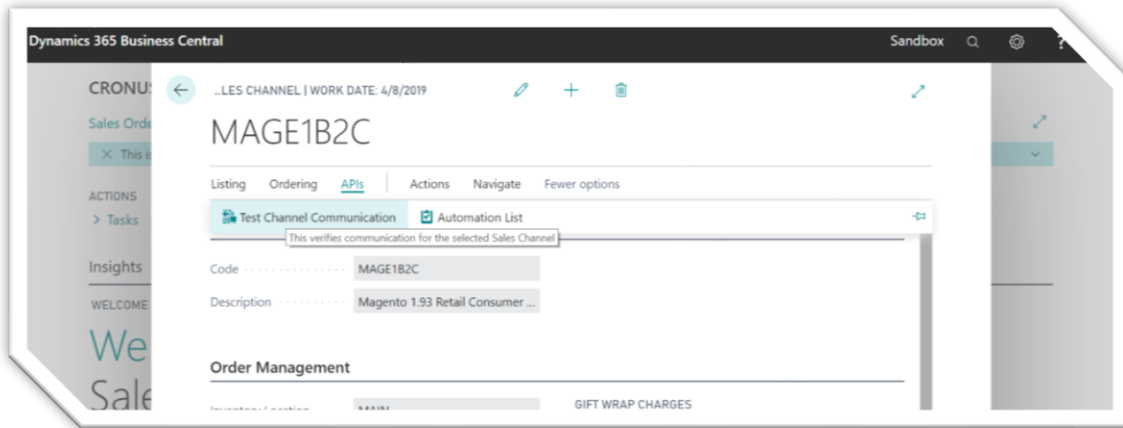
1. The ability to edit or update API Credentials is in the View-API Credentials card. Within the navigation ribbon click **Manage**, then click **Edit**.
2. The expanded view of the API Credential page will view all credential fields that can be edited.

Verify Channel Connectivity and Retrieve Your First Channel Orders

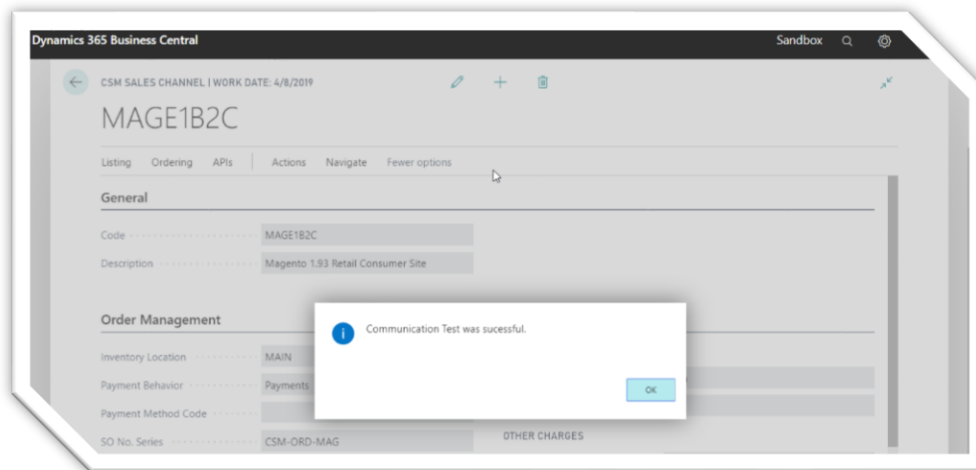
At this point in time, if your host name and credentials are valid, you should be able to conduct a small communication test. After returning to the role center, select the new Sales Channel the setup wizard created.



Next, select API's, then Test Channel Communication.



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



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


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

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

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

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

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

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

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

CSM Functional Settings and Cross References

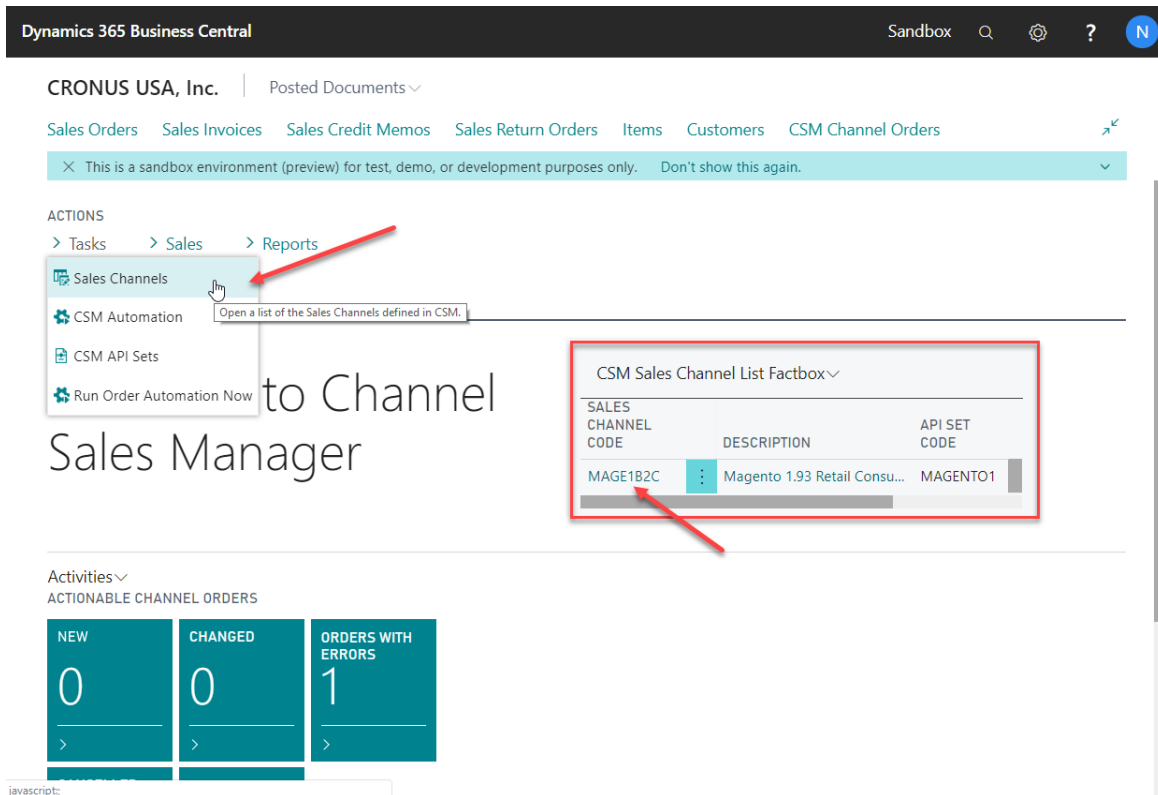
This section will go thru the settings that will customize your CSM experience and cross-reference your data in Business Central to like data in Magento, such as shipping methods, payment types, and customer price groups.

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 Magento Stores defined, one B2C, the other B2B, they would be setup as two Sales Channels in CSM. If you use the Amazon Marketplace, you may sell on Amazon using the FBA (Fulfilled by Amazon) model, and/or the FBM (Fulfilled by Merchant) model. Each of those are different Sales Channels in CSM.

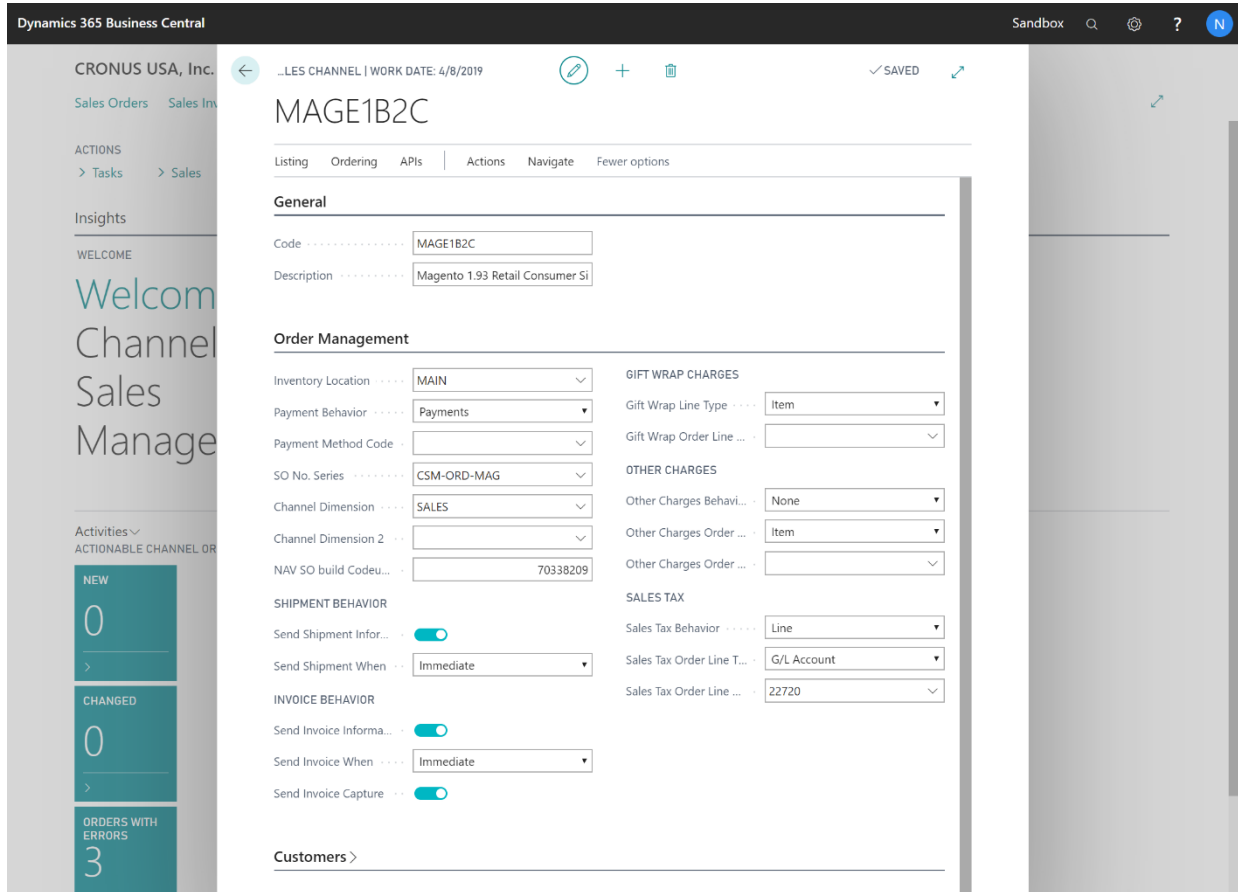
If you used the Magento Quick Setup Wizard, your first Sales Channel should have been setup by that process. Let's see how you can tailor your experience with that Sales Channel or create a new one.

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



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

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



General FastTab

Field	Description	Example Value
Code	This is unique code that identifies the Sales Channel. It can be any value you wish, but we recommend naming it something meaningful that describes the Sales Channel.	MAGENTO_B2C
Description	This is a text description of the Sales Channel.	Magento Retail Store (B2C)

Order Management FastTab

Field	Description	Example Value
Inventory Location	The Business Central (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 BC Sales Orders for this Sales Channel.	CSM-ORD-MAG

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	<p>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.</p> <p>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 <Order ID> 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 <Sales Channel Code>-<Order ID> 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 number exceed the character limitations of the field on the sales document, CSM will truncate the value based on the field's maximum character length.</p> <p>If you leave this field blank, CSM will not assign any external document numbers to orders created for the channel.</p> <p>Note: you may need to choose the Show More action on the Order Management FastTab in order to see this field.</p>	<Sales Channel Code>-<Order ID>
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 selection you make in this field is dependent on the Magento/Adobe Commerce functionality you wish to employ:	Channel / Payments

	<ul style="list-style-type: none"> If you are using the Adobe Commerce Cloud platform, choose <i>Payments</i>. If you are using the Adobe Commerce Pro platform to work with advanced functionality such as gift cards, choose <i>Channel</i>. 	
Payment Method Code	The Code of the BC Payment Method which should be used. For Payment Behavior: Payments, this will be the default value. For Payment Behavior: Channel, this will be the Payment method used on all orders.	AUTHNET
Send Shipment Information	Indicates whether CSM should send shipment information to the Channel.	Yes
Send Shipment When	If CSM is sending Shipment information, this field tells CSM when to send it. Immediate: When the Shipment is posted; Scheduled: Shipment information will be queued and sent by the CSM automation (this assumes that the automation is setup properly to send shipment information); Manual: Shipment information is sent by a user who presses the Send Shipment Information action button on the Channel Order card.	Immediate
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 Magento. This results in CSM sending less data to Magento, 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 Magento. This results in CSM sending less data to Magento, 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
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 Magento, this is dependent by payment method. If your payment method Behavior is set to payments (which it should be for Magento 1.x 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 Magento, and these fields can be ignored for your Magento 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 Magento, and these fields can be ignored for your Magento channels.	N/A

<p>Refund Cr. Memo Behavior fields</p>	<p>The Send Refund Cr. Memo and Send Refund Cr. Memo When fields exist to support return functionality that has not yet been developed for Magento, and these fields can be ignored for your Magento channels.</p>	<p>N/A</p>
<p>Deny Unbalanced Auto Release</p>	<p>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.</p> <p><i>Note: this field has been superseded by CSM's sales operation rules feature and will be removed as part of a later release. If you want to enforce this process, it is recommended you use the sales operation rules feature, instead.</i></p>	
<p>Deny Unbalanced Auto Post</p>	<p>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.</p> <p><i>Note: this field has been superseded by CSM's sales operation rules feature and will be removed as part of a later release. If you want to enforce this process, it is recommended you use the sales operation rules feature, instead.</i></p>	
<p>Address 2 Behavior</p>	<p>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:</p> <ul style="list-style-type: none"> • <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. • <i>Use CSM Order Address 3:</i> CSM will assign a CSM order's address 3 value as the address 2 for Business Central sales orders and customers. 	
<p>Order Total Discount Allocation</p>	<p>Select the method by which order discount amounts will be allocated to channel orders. By default, Magento will provide discount information at the line level, meaning that a separate discount amount is calculated for each item included in an order. Using the order total discount allocation functionality, it is possible to instruct CSM as to how these retrieved discounts should be allocated to channel orders, which will in turn affect the way in which discounts are applied to Business Central sales orders that are created from channel orders. Options are:</p> <ul style="list-style-type: none"> • <i>Not Applicable:</i> channel discount information will be ignored by CSM. 	

	<ul style="list-style-type: none"> <i>Order Level:</i> channel discount information will be applied at the order level. Retrieved line discount amounts will be rolled up into a single document level invoice discount. <i>Line Level:</i> channel discount information will be applied at the order line level. Retrieved line discount amounts will be assigned to the corresponding channel order lines. 	
Archive After Days	Enter the number of days to retain completed and cancelled CSM Channel Orders before they are moved to the archive. (Example: 2D would keep CSM Channel Orders in the current list for 2 days after being closed or cancelled).	
Auto Channel Order Archive	Use this field to enable and disable automatic archiving for Channel Orders for this Channel.	
Gift Wrap Behavior	This setting tells CSM how it should handle Gift Wrap Charges on orders received from the Channel. If you select None, Gift Wrap Charges will be ignored, use this setting if your Magento 1.x implementation does not include Gift wrap services. If you select Line, then when CSM creates the BC Sales Order for a Magento Order, a Sales Order Line will be added to account for Gift Wrap charge.	
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 BC Sales Order for a Magento Order, a Sales Order Line will be added to account for Other Charges.	Line
Other Charges Line Type	If you choose Line as the Other Charges Behavior, this field specifies the Sales Order Line Type which should be used for the Other Charges (Revenue from the Customer). The values can be G/L Account, Item, Resource, or Charge (Item).	G/L Account
Other Charges Order Line No.	If you choose Line as the Other Charges Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Other Charges Line Type chosen).	45120
Sales Tax Behavior	This setting tells CSM how it should handle Sales Tax on orders received from the Channel. If you select None, CSM will build Sales Orders with the Tax Liable flag set to True. In this case, BC will calculate the Sales Tax regardless of what Magento calculated and collected. If you select Line, then when CSM creates the BC Sales Order for a Magento Order, the Tax Liable Flag will be set to FALSE (which keeps BC from calculating sales tax), and Sales Order Lines (one for each item, plus lines for tax collected on order level charges (shipping, gift wrap, other charges)) will be added to account for the Sales Tax Magento calculated and collected.	Line

Sales Tax Line Type	If you choose Line as the Sales Tax Behavior, this field specifies the Sales Order Line Type which should be used for the Sales Tax Lines CSM creates. The values can be G/L Account, Item, Resource, or Charge (Item).	G/L Account
Sales Tax Order Line No.	If you choose Line as the Sales Tax Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Sales Tax Line Type chosen).	22720

Customers FastTab

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 Magento 1.x, if the customer creates a new Magento account when checking out, or for existing Magento customers that have not been defined to CSM (either by setting up the customer as a Sales Channel Customer, or receiving a Magento Order for the customer), CSM considers them a new customer. If the behavior is set to Auto Create, CSM will automatically create a new BC customer and associated CSM Channel Customer based on the Customer Template defined above, this will occur when CSM builds the BC Sales Order from the Channel Order. If the behavior is set to Sales Channel, the CSM will not create a new customer, but will build the sales order to the Customer Template customer defined above and change the billing and ship-to addresses directly on the Sales Order appropriately. If the behavior is set to Manual, CSM will not automatically create a customer, and the Sales Order build process will fail unless a Channel Customer is manually setup and linked to a valid BC customer.	Auto Create
Guest Customer Behavior	Indicates how CSM will treat customers for what CSM determines is a guest customer. Valid Choices are: Auto Create, Sales Channel, and Manual. For Magento 1.x, if the customer checks out as a guest CSM considers them a guest customer. If the behavior is set to Auto Create, CSM will automatically create a new BC customer and associated CSM Channel Customer based on the Customer Template defined above, this will occur when CSM builds the BC Sales Order from the Channel Order. Even though they checked out as a guest, CSM can still identify the customer if they use the same email address for future orders the customer may place. If the behavior is set to Sales Channel, the CSM will not create a new customer, but will build the sales order to the Customer Template customer defined above and change the billing and ship-to addresses directly on the Sales Order appropriately. If the behavior is set to Manual, CSM will not automatically create a customer, and the Sales Order build process will fail unless a Channel Customer is manually setup and linked to a valid BC customer.	Auto Create

Auto Create BC Contact	Indicates whether CSM will also automatically create a BC contact for any new customers CSM creates.	Yes
Default Customer Group ID.	Indicates which Magento Customer Group ID will be assigned to new customers sent to Magento. This ID will only be used if a relationship between the BC customer price group the BC customer is assigned to and Magento Customer groups does not exist in the CSM Price Group table. Normally the Magento General customer group has an ID of 1.	1
New Customer No. Series	Indicates which No. Series should be used when CSM automatically creates a new BC customer.	CSM-CUST

API Data FastTab


Field	Description	Example Value
Credentialing Sales Channel	Enter the sales channel whose API credential settings will be used for API activities. If this value is left blank, the channel's assigned credentials will be used for its own API calls. For more information on credentialing, see here .	
Store ID	Enter the Magento store ID that is represented by the sales channel. If you have multiple Magento stores that you want to integrate with Business Central, you must set up a separate sales channel for each one.	1
Store Code	It is possible to set up unique store codes for each Magento store. These codes are appended to a store's URL. If the sales channel is associated to a Magento store with a defined code, you can enter it here.	
Website ID	Enter the website ID for the Magento store that is associated to the sales channel. A website ID is unique from the store ID in that the latter identifies the Magento store itself, while the former identifies that store's website.	1
API Set Code	Identifies the API Set code that should be used for API communication with Magento.	MAGENTO2
API User ID / API User Password	Certain API calls are made against specific sales channel records. CSM will use the user ID and password that are assigned to a specific store when calls are made against that store. In scenarios where the same user ID and password apply to multiple stores, the credentialing sales channel functionality can be used.	

CSM Shipping Methods

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

CSM shipping carriers correspond to "delivery method" records in Magento. Magento uses this record type to represent all delivery scenarios, including generic ones such as free shipping and flat rate shipping, as well as specific shipping carriers. By default, Magento supports a number of standard delivery methods. Although extensions exist to add delivery methods beyond these provided defaults, it is not possible for Magento users to manually set up new records.

It is recommended that you use CSM shipping methods to link your Business Central shipping agent codes and your Magento delivery methods. When shipping information is sent between your Business Central and Magento environments, this association will ensure that the proper order information is maintained in both platforms. You can automatically load new CSM shipping method records that are based on Magento'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 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 creates new CSM shipping method records based on the default methods that are supported by Magento. If CSM is able to identify a Business Central shipping agent code that is identical to a CSM shipping method record's external ID, 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 method's external ID, a new shipping agent code will be created and assigned to the CSM shipping carrier line.

***Note:** the functionality to load CSM shipping methods does not extend beyond the default methods that are supported by Magento. If extensions that allow for the assignment of additional delivery methods are deployed in your Magento environment, you must manually set up the related CSM shipping method records in Business Central.*

5. If you want to post a shipping method's shipping charges to a Business Central account, use the **Shipping Order Charge Type** and **Shipping Order Change No.** fields to identify the account to which charges will be recorded.

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


CSM Payment Methods

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

CSM payment methods correspond to "payment method" records in Magento. Magento 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 Braintree. Although extensions exist to add payment methods beyond these provided defaults, it is not possible for Magento users to manually set up new records.

It is recommended that you use CSM payment methods to link your Business Central payment method codes and your Magento payment methods. When payment information is sent between your Business Central and Magento

environments, this association will ensure that the proper payment information is maintained in both platforms. You can automatically load new CSM payment method records that are based on Magento'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 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 creates new CSM payment method records based on the default methods that are supported by Magento. If CSM is able to identify a Business Central payment method code that is identical to a CSM payment method record's external ID, it will automatically link these records by assigning the value in the **Payment Method Code** field. If CSM cannot identify a payment method code that matches a CSM payment method external ID, a new payment method code will be created and assigned to the CSM payment methods.

5. Make any necessary adjustments to the assigned values in the **Payment Method Code** field. For example, if you wish to link multiple Magento payment methods to the same Business Central payment method, you can manually make this change.

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:** the functionality to load CSM payment methods does not extend beyond the default methods that are supported by Magento. If extensions that allow for the assignment of additional delivery methods are deployed in your Magento environment, you must manually set up the related CSM payment method records in Business Central.*

CSM Shipping Carriers


Most eCommerce platforms contain some sort of way to identify the carrier 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 a subset of “delivery method” records in Magento. Magento uses this record type to represent all delivery scenarios, including generic ones such as free shipping and flat rate shipping, as well as specific shipping carriers. By default, Magento supports the following common carriers:

- DHL
- FedEx
- UPS
- USPS

Although extensions exist to add delivery methods for other carriers, it is not possible for Magento 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 Magento delivery methods. When shipping information is sent between your Business Central and Magento 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 Magento’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 methods that are supported by Magento. If CSM is able to identify a Business Central shipping agent code that is identical to a CSM shipping carrier record’s external ID, 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 external ID, 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 Magento. If extensions that allow for the assignment of additional delivery methods are deployed in your Magento environment, you must manually set up the related CSM shipping carrier records in Business Central.*

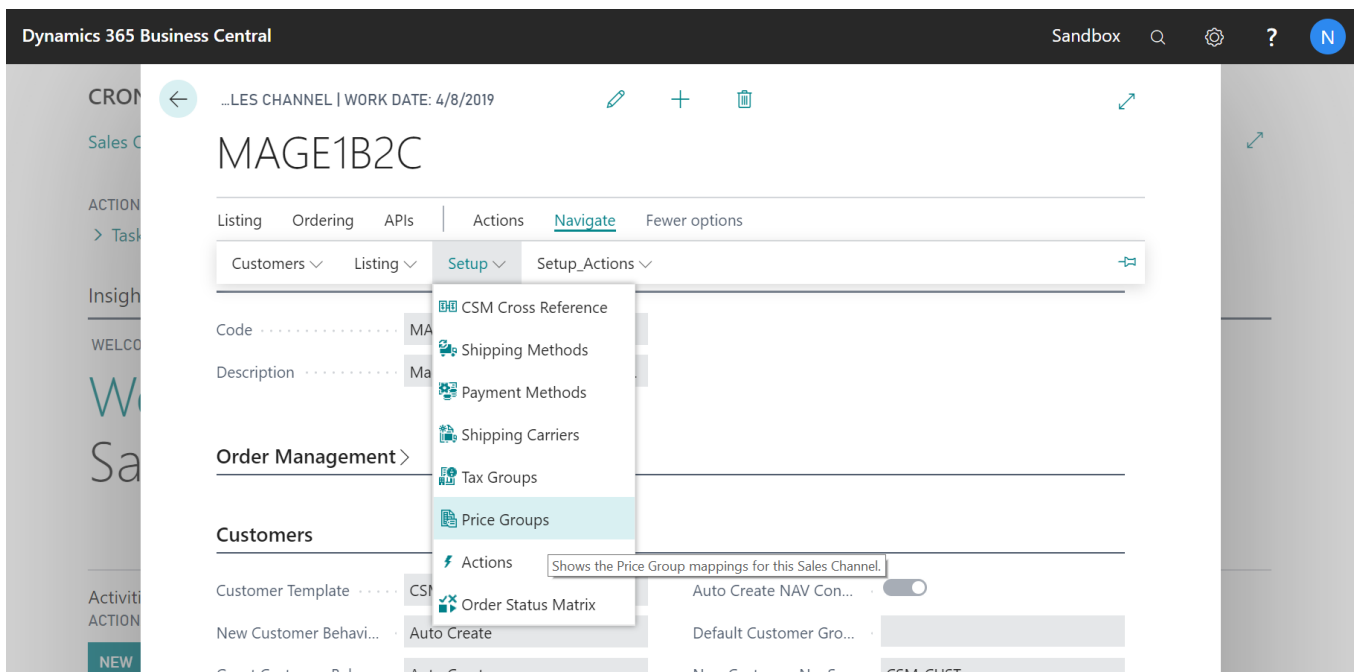
CSM Tax Groups

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

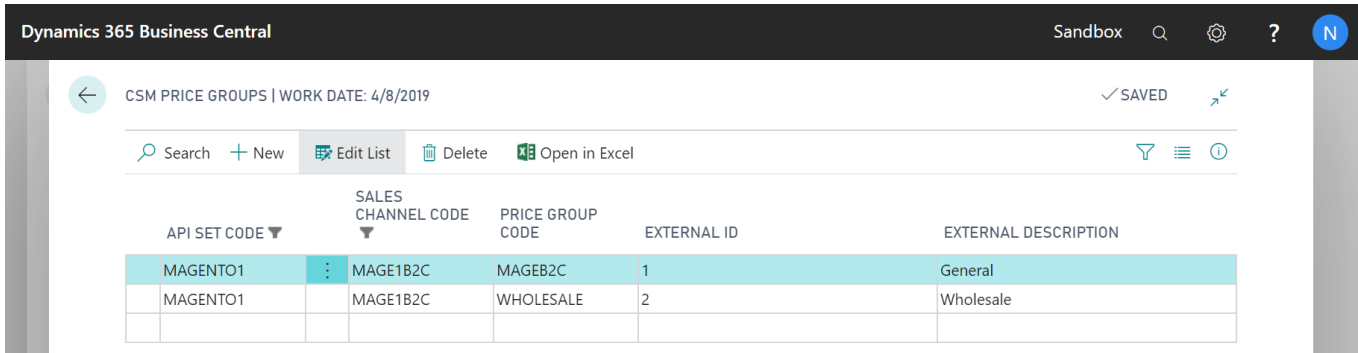
CSM Price Groups

CSM needs to map Magento Customer Groups to Business Central Price Groups for each Sales channel you have defined. This allows CSM to create Magento Customers from BC Customer/Contacts with the proper Magento Customer Group. CSM Listing Management also uses this information to send Customer Group based pricing to Magento.

This Price Group cross reference information can be located on the Navigation ribbon of the CSM Sales Channel Card.



Each Business Central Price Group, that represents a customer group on Magento, should be added and linked to Magento. In the following example, we are linking 2 Business Central Price Groups to their Magento counter parts, which are the Magento ID of the Customer Group.



API SET CODE	SALES CHANNEL CODE	PRICE GROUP CODE	EXTERNAL ID	EXTERNAL DESCRIPTION
MAGENTO1	MAGE1B2C	MAGEB2C	1	General
MAGENTO1	MAGE1B2C	WHOLESALE	2	Wholesale


Manually Entering the External ID

The Magento Customer Group IDs can be found on the Magento Admin Panel: Customers > Customer Groups page. The ID column presents the ID of each customer group.

Note: although it is preferred to have each Business Central price group cross-referenced to a unique Magento customer group, it is possible for more than one Business Central price group to point to the same Magento customer group.

Retrieving Price Groups from Magento


Instead of manually setting up price group records, you can instruct CSM to retrieve customer group records from Magento and automatically create corresponding CSM price group records. As part of this process, the external ID value for each CSM price group is automatically populated, making this a quick and easy way to set up CSM price groups.

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 price groups.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Price Groups** action.
4. In the **CSM Price Groups** window, choose the **Actions** ribbon, then choose the **Retrieve Price Groups** action.

CSM retrieves customer group records from the sales channel's connected Magento store and creates new CSM price group records for each one.

Sending Price Groups to Magento

It is also possible to instruct CSM to send/update price group records from Business Central to Magento:

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 send price groups.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Price Groups** action.
4. In the **CSM Price Groups** window, choose the CSM price group line that you want to send to Magento. This record must have an assigned Business Central customer price group. It also must have an assigned tax class ID (refer to CSM tax group records or your Magento tax classes to obtain valid IDs)
5. If necessary, enter the value that Magento will use to identify the price group in the **External Description** field.

6. Choose the **Actions** ribbon, then choose the **Send to External** action.

CSM sends the selected price group's information to the sales channel's connected Magento store. If the price group did not previously exist as a record in Magento, it will be created and that Magento customer group's ID will be retrieved and assigned in the **External ID** field on the CSM price group line. If the record already exists within Magento and an external ID is present, the Magento record will be updated with new data from the CSM price group record (a new external description, for example).


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

Order Notes Placement

CSM does not automatically retrieve order notes (either customer-entered notes, notes entered by a user through the Magento administration portal, or system-generated notes) from Magento. It is possible to obtain this information via customization, however. In such a scenario, retrieved order notes would be 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:

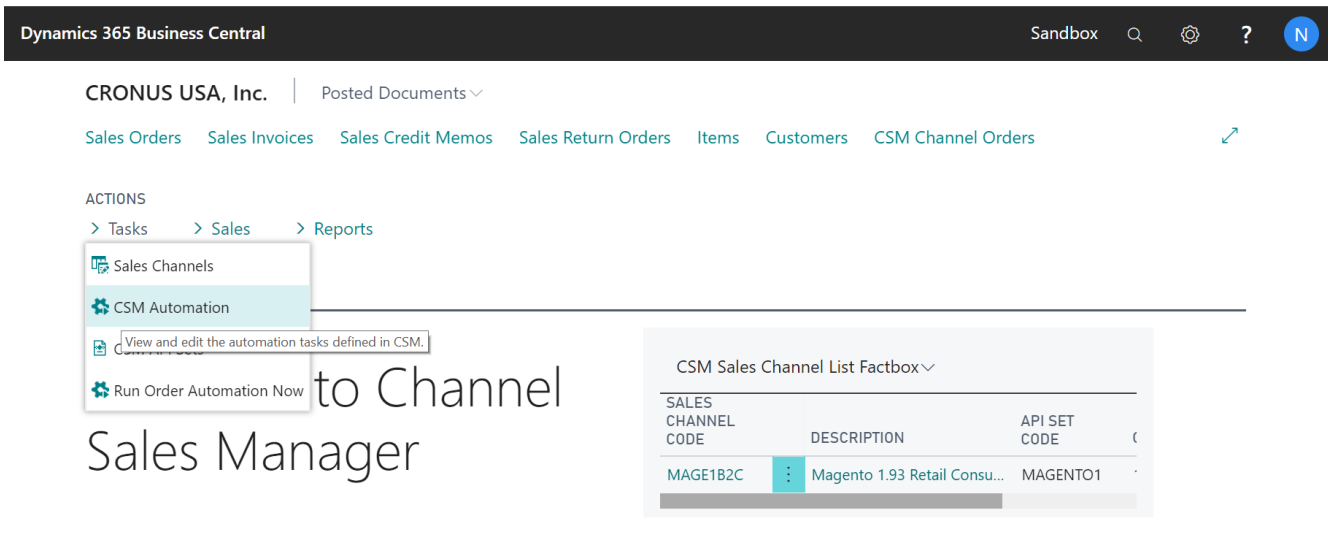
1. Choose the  icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the CSM sales channel record for which you want to set up order note placement.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Order Notes Placement** action.
4. On a new line, 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.

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.

CSM Automation List

The Automation List allows for tasks to be run in batch and on a schedule and can be found in the Role Center tasks.



CSM AUTOMATION LIST | WORK DATE: 4/8/2019

SALES CHANNEL CODE	AUTOMA. TYPE	SEQUEN. #	CODEUNIT ID CODE	ORDER STATUS	CHANNEL STATUS VALUE	NAV ORDER STATUS	DESCRIPTION	AU. CR. SO	AU. RE. SO	AU. PD. SO	API SET CODE	API FUNCTION CODE	NEXT AUTOMA. CODE	SCHEDULED FREQUENCY	LAST RUN TIMESTAMP
MAGE1B2C	Fulfillment	110	SHIPMENT...	ORDERMGT...	Not Applica...	Not Applica...	Sends Shipment information to...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1			1 minute	6/21/2019 6:44 PM
MAGE1B2C	Fulfillment	115	SENDINVOI...	ORDERMGT...	Not Applica...	Not Applica...	Sends Invoice information to M...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1			1 minute	6/21/2019 6:44 PM
MAGE1B2C	API	210	MAGESALE...	ORDERMGT...	Not Applica...	Not Applica...	Retrieves Orders from Magento 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1	SALESORDER...		1 minute	6/21/2019 6:44 PM
MAGE1B2C	Order	1100	GETORDERL...	ORDERMGT...	In Complete	No Order	Get Order Lines when this statu...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MAGENTO1	SALESORDER...		1 minute	6/21/2019 6:44 PM
MAGE1B2C	Order	1105	GETORDERL...	ORDERMGT...	In Complete	No Order	Get Order Lines when this statu...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1	SALESORDER...		1 minute	6/21/2019 6:44 PM
MAGE1B2C	Listing	3100	AVAILABILITY	LISTINGMG...	Not Applica...	Not Applica...	Sends Item Availability to Mage...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1				11/1/2018 12:00 ...
MAGE1B2C	Listing	3105	CATEGORY	LISTINGMG...	Not Applica...	Not Applica...	Sends Channel Category to Ma...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1				11/1/2018 12:00 ...
MAGE1B2C	Listing	3110	ATTRIBUTES	LISTINGMG...	Not Applica...	Not Applica...	Sends Attribute Set (including a...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1				11/1/2018 12:00 ...
MAGE1B2C	Listing	3115	ATTRIBUTE	LISTINGMG...	Not Applica...	Not Applica...	Sends Attribute information (in...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1				11/1/2018 12:00 ...
MAGE1B2C	Listing	3120	ATTRSETSY...	LISTINGMG...	Not Applica...	Not Applica...	Performs the Attribute Set Sych...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1				11/1/2018 12:00 ...
MAGE1B2C	Listing	3125	PRODUCTLL...	LISTINGMG...	Not Applica...	Not Applica...	Sends Product Listing Informati...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1				11/1/2018 12:00 ...
MAGE1B2C	Housekeep...	999999	HOUSEKEEP...	ORDERMGT...	Not Applica...	Not Applica...	CSM Housekeeping and Mainte...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MAGENTO1			1 minute	6/21/2019 6:44 PM

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

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

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

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

Fulfillment Automation Tasks

The first two automation tasks address the sending of Invoice and Invoice information to Magento.

Send Shipment Information:

If in the Sales Channel, you turned **Send Shipment Information** switch to **on** and set the **Send Shipment When to Scheduled**, when this task is selected to run, all pending Shipment information will be sent to Magento. If you selected Immediate, and an exception in the process prevented the communication from immediately completing, the Automation Task will try again to send the information. If you selected Manual, this task will not send any Shipment information automatically.

Here is a field-by-field listing of the values necessary for the Automation to send Invoice Information.

Automation Task – Send Invoice Information to Magento		
Field	Description	Example Value
Sales Channel	The Sales Channel for which Shipping Information should be sent.	MAGE1B2C
Automation Type	Should always be Fulfillment.	Fulfillment
Sequence	The Sequence in the Automation run that Shipping Information should be sent. It is best to have Shipping information be the first task executed.	110
Code	The code the Automation uses to know what to do. Should always be set to SHIPMENTTRACKING	SHIPMENTTRACKING
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues .	ORDERMGTDFAULT
Order Status	This value is Not Applicable for Send Shipment information to Magento.	Not Applicable
Channel Status Value	This value is Not Applicable for Send Shipment information to Magento.	
BC Order Status	This value is Not Applicable for Send Shipment information to Magento.	
Description	A description of the entry.	Sends Shipment Information to Magento 1
Auto Create SO	This value is Not Applicable for Send Shipment information to Magento.	Not Checked
Auto Release SO	This value is Not Applicable for Send Shipment information to Magento.	Not Checked
Auto Post SO	This value is Not Applicable for Send Shipment information to Magento.	Not Checked
API Set Code	This value should be the API Set the Sales Channel uses	MAGENTO1
API Function Code	This value is Not Applicable for Send Shipment information to Magento.	

Next Automation Code	This value is Not Applicable for Send Shipment information to Magento.	
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

Send Invoice Information:

If in the Sales Channel, you turned “Send Invoice Information” on, and set the “Send Invoice When” to “Scheduled,” when this task is selected to run, all pending invoice information will be sent to Magento. If you selected “Immediate,” and an exception in the process prevented the communication from completing, the Automation Task will try again to send the information. If you selected “Manual,” this task will not send any invoice information automatically.

Here is a field-by-field listing of the values necessary for the Automation to send Invoice Information.

Automation Task – Send Invoice Information to Magento		
Field	Description	Example Value
Sales Channel	The Sales Channel for which Invoice Information should be sent.	MAGE1B2C
Automation Type	Should always be Fulfillment.	Fulfillment
Sequence	The Sequence in the Automation run that Invoice Information should be sent. It is best to have Invoice information be sequenced before the Order List API task.	115
Code	The code the Automation uses to know what to do. Should always be set to SENDINVOICE	SENDINVOICE
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues .	ORDERMGTDEFAULT
Order Status	This value is Not Applicable for Send Invoice information to Magento.	Not Applicable
Channel Status Value	This value is Not Applicable for Send Invoice information to Magento.	
BC Order Status	This value is Not Applicable for Send Invoice information to Magento.	
Description	A description of the entry.	Sends Invoice Information to Magento 1
Auto Create SO	This value is Not Applicable for Send Invoice information to Magento.	Not Checked

Auto Release SO	This value is Not Applicable for Send Invoice information to Magento.	Not Checked
Auto Post SO	This value is Not Applicable for Send Invoice information to Magento.	Not Checked
API Set Code	This value should be the API Set the Sales Channel uses	MAGENTO1
API Function Code	This value is Not Applicable for Send Invoice information to Magento.	
Next Automation Code	This value is Not Applicable for Send Invoice information to Magento.	
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

API Automation Tasks

The API Automation Tasks are those that run at the API Set level and are not tied to a specific Sales Channel that uses the API Set. For example, both the Amazon and Magento API Functions to retrieve Channel Orders are setup 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 Magento that are new or have changed since the last time CSM retrieved orders. Initially, the date that CSM uses to determine whether the orders are new or have changed is set by the Sales Channel Setup Actions function: Starting Order Retrieval Date. Note that this API task only retrieves summary information regarding the order. Order lines and other order information is performed by the next automation task described: Get Order Lines

Here is a field-by-field listing of the values necessary for the Automation to retrieve the Magento Order List.

Automation Task – Retrieve Magento Orders		
Field	Description	Example Value
Sales Channel	This should be blank for Magento, CSM uses the API Set to download all Magento Orders for all sales channels tied to the API Set.	
Automation Type	Should always be API.	API
Sequence	The Sequence in the Automation run that Order List information is retrieved.	210
Code	This value is for your reference since the Automation Task uses the API Set Code and the API Set Function Code to determine what to do.	MAGESALESORDERLIST
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 separate job queues .	
Order Status	This value is Not Applicable for the API Sales Order List.	Not Applicable
Channel Status Value	This value is Not Applicable for the API Sales Order List.	
BC Order Status	This value is Not Applicable for the API Sales Order List.	
Description	A description of the entry.	Retrieves Orders from Magento 1
Auto Create SO	This value is Not Applicable for the API Sales Order List.	Not Checked
Auto Release SO	This value is Not Applicable for the API Sales Order List.	Not Checked
Auto Post SO	This value is Not Applicable for the API Sales Order List.	Not Checked
API Set Code	The Magento API Set to use when executing the Task	MAGENTO1
API Function Code	The API Function Code to Use when executing the Task. This will almost always be SALESORDERLIST for Magento 1.9 API Sets.	SALESORDERLIST
Next Automation Code	This value is Not Applicable for the API Sales Order List.	
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run.	15 Minutes
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 12:00 AM

Order Automation Tasks

The Order Automation Tasks are those that download additional information regarding the summary orders retrieved by API processing. The Order Automation tasks can then specify additional processing to occur for each valid order. For example, the Order Automation task can create, release and even post a Sales Order.

Get Order Lines Order Automation Task:

This task will automatically retrieve additional order information, including the order lines, for any order that has reached the Channel Status Value specified in the Task. For example, if a credit card payment was authorized by Magento, Magento would normally set its status to “processing” for a valid order. For a purchase order payment, Magento would set its status to pending. With this automation task, you specify which Magento status the task should look for before retrieving the balance of the order information and process Business Central Sales Orders.

Here is a field-by-field listing of the values necessary for the Automation to retrieve and process the Get Order Lines Task.

Automation Task – Retrieve Magento Orders

Field	Description	Example Value
Sales Channel	The Sales Channel for which order line Information should be retrieved and processed.	MAGE1B2C
Automation Type	Should always be Order.	Order
Sequence	The Sequence in the Automation run that Order Line information is retrieved.	1100
Code	This value is for your reference since the Automation Task uses the API Set Code and the API Set Function Code to determine what to do.	GETORDERLINES
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues .	ORDERMGTDEFAULT
Order Status	The CSM assigned status of the order which should have be reached before processing this task. For Magento Get Order Lines, this is normally In Complete which designates an order whose summary information has been retrieved (via the API MAGESALESORDERLIST) but has not yet retrieved the remainder of the order information.	In Complete
Channel Status Value	The Magento Status of the Order that this Automation task should process.	Processing
BC Order Status	The relationship status between the Channel Order and a Business Central Sales Order, normally this should be set to No Order.	No Order
Description	A description of the entry.	Get Order Lines when this status appears
Auto Create SO	If you wish CSM to automatically create a Business Central Sales Order for the Magento Order being processed.	Checked
Auto Release SO	If you want CSM to automatically Release the Business Central Sales Order that was automatically created by CSM, check this box.	User preference
Auto Post SO	This would normally only be checked when the shipment of the order is automated. For example, Amazon FBA orders are fulfilled (shipped) by Amazon, so in this case, we want CSM to fully process the completed order. Magento users may want to use this feature if they are using a 3PL company to fulfill orders and the 3PL notification to Fulfill the order comes directly from Magento. This however is not normally the case, in which it should not be checked.	Not Checked
API Set Code	The Magento API Set to use when executing the Task	MAGENTO1
API Function Code	The API Function Code to Use when executing the Task. This will almost always be SALESORDERINFO for Magento 1.9 API Sets.	SALESORDERINFO
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

Note that it is possible to have more than one Get Order Lines task defined for CSM to process different Magento Status. For example, you could have one line that Creates (but does not release) a Business Central Sales Order when the Magento Status is pending, and another line that creates and releases a Business Central Sales Order when the Magento Status is processing. Keep in mind that the Magento status is case sensitive and should match the exact status as Magento sends it. Also, defining multiple lines requires that the Sequence value be unique.

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

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

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


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

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

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

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

To create a job queue entry for order management automation:

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

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

CSM Sales Operation Rules

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

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


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

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

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

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

To load the default rules that are included with CSM:

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

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

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

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

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

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

CSM Sales Operation Rule Functions

Each scenario that is addressed by CSM sales operation rules is designed as a separate action processing function. These functions are contained within a codeunit that is identified as a unique "sales operation rule evaluator." CSM's out-of-

the-box functionality includes a *CSM Sales Operation Rules Mgt.* rule evaluator that comprises the processing functions for its default scenarios.

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

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

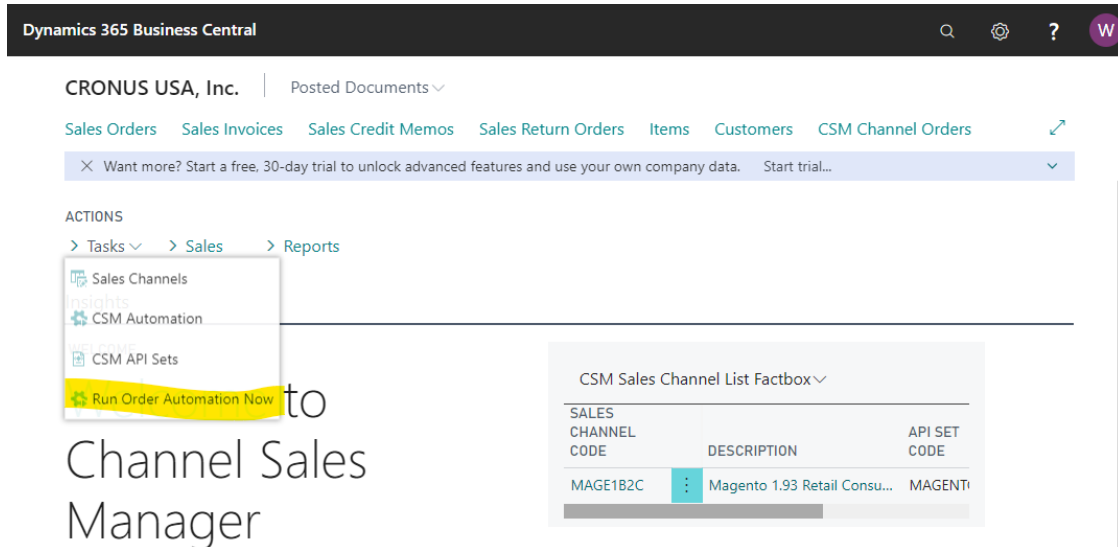
The creation of new CSM sales operation rule functions and evaluators does require development activity; if you want to add new sales operation rules to your CSM solution, please consult your CSM partner for assistance.

CSM Everyday Operations

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

Running the Automation Manually

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



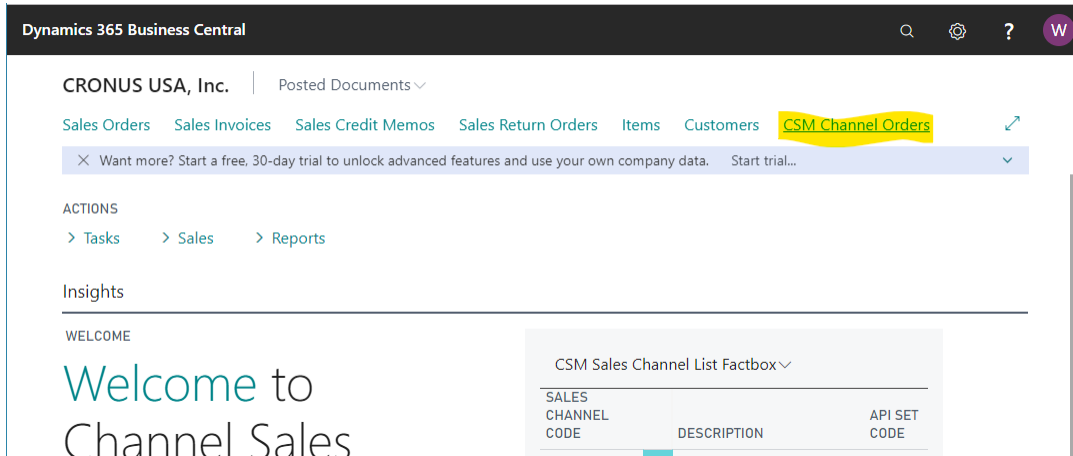
The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.' with the 'Posted Documents' view. The navigation pane includes 'Sales Orders', 'Sales Invoices', 'Sales Credit Memos', 'Sales Return Orders', 'Items', 'Customers', and 'CSM Channel Orders'. A banner offers a 30-day trial. The 'ACTIONS' pane is open, showing a breadcrumb trail: 'Tasks > Sales > Reports'. Under 'ACTIONS', there are sections for 'SALES CHANNELS', 'UTILITIES', and 'TOOLS'. The 'TOOLS' section contains 'CSM API Sets' and 'Run Order Automation Now', which is highlighted with a yellow banner. To the right, a 'CSM Sales Channel List Factbox' is visible, containing a table with columns for 'SALES CHANNEL CODE', 'DESCRIPTION', and 'API SET CODE'.

SALES CHANNEL CODE	DESCRIPTION	API SET CODE
MAGE1B2C	Magento 1.93 Retail Consu...	MAGENTI

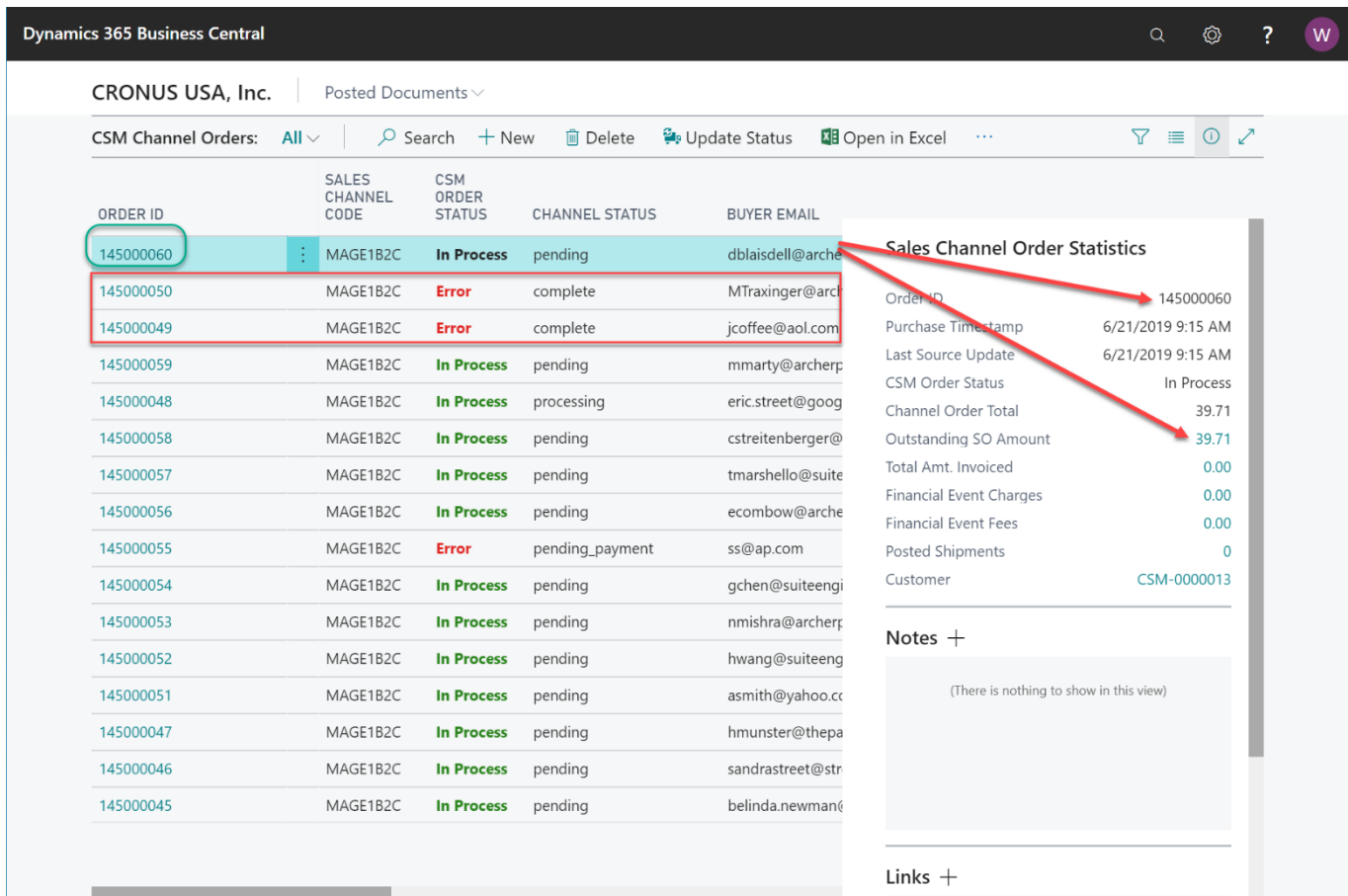
to
Channel Sales
Manager

Viewing Channel Orders

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



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



ORDER ID	SALES CHANNEL CODE	CSM ORDER STATUS	CHANNEL STATUS	BUYER EMAIL
145000060	MAGE1B2C	In Process	pending	dblaisdell@arche
145000050	MAGE1B2C	Error	complete	MTraxinger@arche
145000049	MAGE1B2C	Error	complete	jcoffee@aol.com
145000059	MAGE1B2C	In Process	pending	mmarty@archerp
145000048	MAGE1B2C	In Process	processing	eric.street@goog
145000058	MAGE1B2C	In Process	pending	cstreitenberger@
145000057	MAGE1B2C	In Process	pending	tmarshello@suite
145000056	MAGE1B2C	In Process	pending	ecombow@arche
145000055	MAGE1B2C	Error	pending_payment	ss@ap.com
145000054	MAGE1B2C	In Process	pending	gchen@suiteengi
145000053	MAGE1B2C	In Process	pending	nmishra@archerp
145000052	MAGE1B2C	In Process	pending	hwang@suiteeng
145000051	MAGE1B2C	In Process	pending	asmith@yahoo.co
145000047	MAGE1B2C	In Process	pending	hmunster@thepa
145000046	MAGE1B2C	In Process	pending	sandrastreet@str
145000045	MAGE1B2C	In Process	pending	belinda.newman@

Sales Channel Order Statistics

Order ID: 145000060

Purchase Timestamp: 6/21/2019 9:15 AM

Last Source Update: 6/21/2019 9:15 AM

CSM Order Status: In Process

Channel Order Total: 39.71

Outstanding SO Amount: 39.71

Total Amt. Invoiced: 0.00

Financial Event Charges: 0.00

Financial Event Fees: 0.00

Posted Shipments: 0

Customer: CSM-0000013

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

Also above, you will see 3 orders with an Error status. CSM will assign an Error status to a Channel Order if it could not create a Sales Order because of a Shipping/Payment/Item cross reference that is missing, or when the status received from the Channel, does not make sense based on the current information in Business Central. In the above Channel Order List example, Magento Orders 145000049 and 145000050 have a Magento Status of Complete (which implies that they have both been shipped and invoiced), however no record of a shipment/Invoice for that order can be found in Business Central.

Order 14500060 is the current (highlighted) row, so the Sales Channel Order Statistics FactBox shows information for that order. In that FactBox, we can see that the Order Total received from Magento was \$39.71. We can also see that there is an Outstanding Business Central Sales Order that totals \$39.71 as well.

Updating Channel Orders

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

Deleting Channel Orders

If necessary, an individual channel order can be deleted from the CSM Channel Orders list or card by choosing the Delete action in the ribbon. It is also possible to select multiple orders in the CSM Channel Orders list and delete them at once by choosing the Delete Selected Channel Orders action in the ribbon. Business Central will ask you to confirm that you want to delete the selected orders, and if you answer Yes, proceed with the deletion. Business Central will not delete any selected orders that:

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

Once the deletion process is completed, the application will inform you of how many orders have been deleted (this number may be less than the originally selected quantity if any of the selected orders failed to meet the criteria mentioned above).

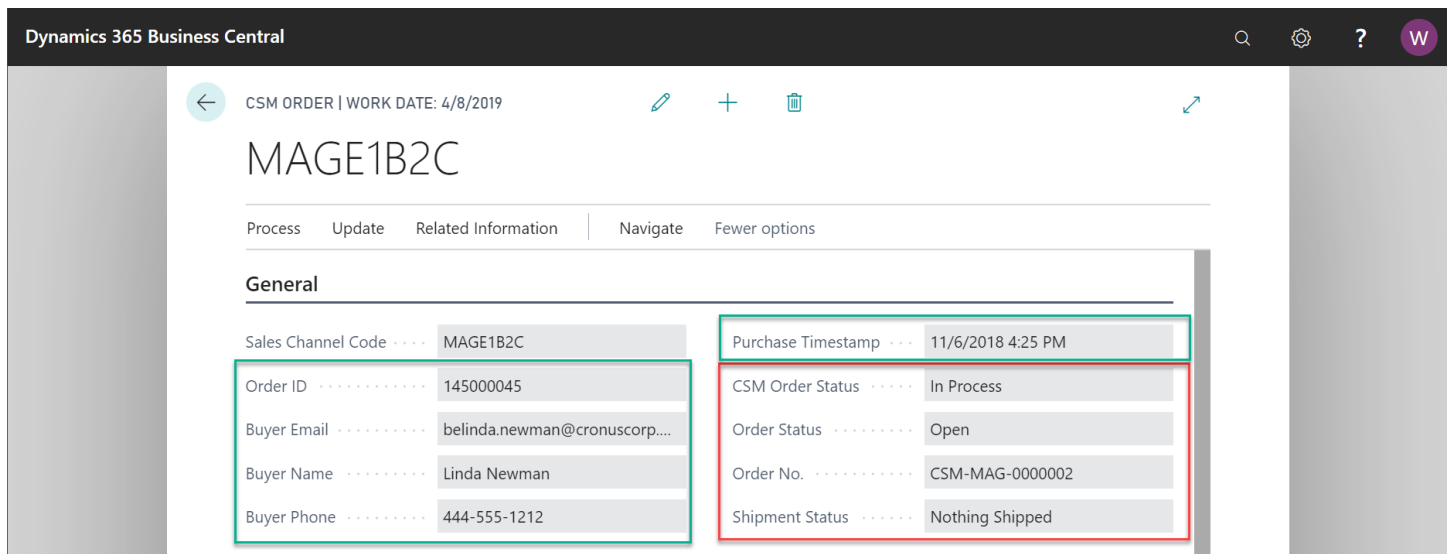
It is important to note that deleted CSM channel orders can be re-created in Business Central by opening the relevant sales channel record, setting the starting order retrieval date to reflect a date prior to the orders’ creation, and then re-running the channel’s automation routine. This is useful in scenarios where a missing or incorrect setup issue in a sales channel environment resulted in a large quantity of incorrect CSM channel orders within Business Central. If this occurs, the user can select all of these channel orders and delete them at once using the bulk delete functionality described here, correct the problem within the sales channel, then re-import all of the orders into Business Central.

Channel Order Card

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

General FastTab

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



The screenshot shows the 'General' tab of a Channel Order Card in Dynamics 365 Business Central. The card title is 'MAGE1B2C' with a work date of 4/8/2019. Below the title are navigation options: Process, Update, Related Information, Navigate, and Fewer options. The 'General' section contains two columns of fields:

General	
Sales Channel Code	MAGE1B2C
Order ID	145000045
Buyer Email	belinda.newman@cronuscorp...
Buyer Name	Linda Newman
Buyer Phone	444-555-1212
Purchase Timestamp	11/6/2018 4:25 PM
CSM Order Status	In Process
Order Status	Open
Order No.	CSM-MAG-0000002
Shipment Status	Nothing Shipped

In the screenshot, the fields 'Order ID', 'Buyer Email', 'Buyer Name', and 'Buyer Phone' are bordered in green, indicating they are values from Magento. The fields 'Purchase Timestamp', 'CSM Order Status', 'Order Status', 'Order No.', and 'Shipment Status' are bordered in red, indicating they are fields used by CSM to track status.

- **CSM Order Status** is a summary status value based on the integrity of the data, and relationship of the Channel Order to other Business Central Sales Documents (Sales Order, Posted Invoices, Posted Shipments).
- **BC Order Status** is a status indicating what CSM found in Business Central that are related order documents.
- **No Order** – No Business Central Sales Documents were found for this Channel Order.
- **Open** – A Business Central Sales Order Exists with a status of Open.
- **Released** – A Business Central Sales Order Exists with a status of Released.
- **Partial** – A Business Central Sales Order Exists and some of the items on the order have shipped.
- **Pending Approval** – A Business Central Sales Order Exists with a status of Pending Approval.
- **Pending Prepayment** – A Business Central Sales Order Exists with a status of Pending Prepayment.
- **Shipped** – Posted Shipments exist that have completed the order.
- **Order No.** If the BC 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.

Channel Order Lines FastTab

The lines on the **Chanel Order Lines** FastTab display the order lines as received from Magento. Note that the Channel Item No. and Channel Item Description are how Magento knows the items as. 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 such.

CSM Order Documents FastTab

Order documents refer to different types of information that may be retrieved or sent between Business Central and Magento 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 Magento, 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 Magento, 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 card, 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..

Shipping FastTab

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

The Magento channel order’s retrieved delivery method is entered in the **Channel Shipping Method** field. CSM uses the Magento 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 delivery method, 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 FastTab section on the Channel Order is Invoicing Information as it was received from Magento.

Shipping >

Invoicing

Currency Code	USD	AMOUNTS	
Channel Payment Method		Order Level Shipping Charge	13.15
BILLING ADDRESS		Order Level Shipping Sales Tax ..	0.00
Bill To Name	Belinda Newman	Order Level Discount Code	
Bill To Address 1	140 Cronus Corp Drive	Order Level Discount Amount	0.00
Bill To Address 2		Other Charges Description	
Bill To Address 3		Other Charges Amount	0.00
Bill To City	South Bend	Other Charges Sales Tax	0.00
Bill To State	Indiana	Channel Order Total	110.10
Bill To Postal Code	39392	Order Total Tax	0.00
Bill To Country	US		

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

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

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

Channel Data FastTab

The Channel Data FastTab section on the Channel contains additional information received from Magento.

Channel Status Value – This contains the channel order’s status as received from Magento. Each Magento order state can have one or more status values. By default, each order state contains a number of predefined status values, but users can also create their own and assign them to states. In this way, Magento users can follow their own business workflow while not disrupting Magento’s processes.

- Channel Customer Code – The Magento 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 Magento when placing this order. Note that CSM uses this value to determine the appropriate Customer behavior. Also, CSM can determine that a Customer (who used the same email address on a previous order) previously was setup as a guest customer, and now has registered an account on the Magento store.
- Seller Order ID – The Order ID (Not Order Number) that Magento assigns to the order.
- Store ID – This is the Magento store ID.
- Store Name – A text version of the website and store that the Magento order occurred in.
- Marketplace ID – This contains the Magento Website ID that the order was placed on.
- Channel Order State – This contains the channel order’s state as received from Magento. Order states represent a predetermined workflow that is used by Magento to understand the condition of a given order and process it accordingly.

The rest of the fields in this FastTab are used by other channels (such as Amazon Marketplace) and should be blank for Channel Orders from Magento.

Information FastTab

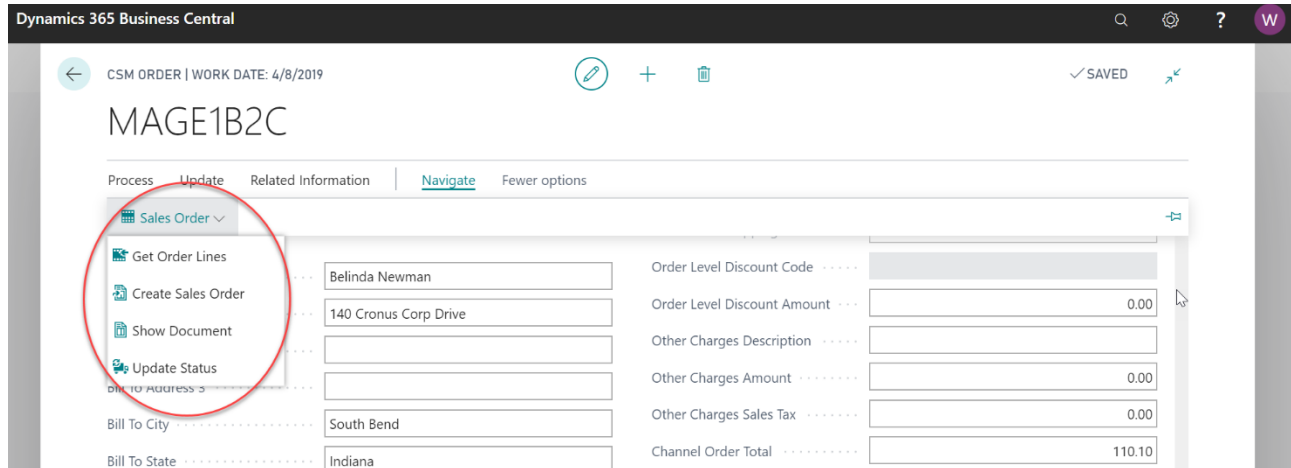
This FastTab on the channel order mostly contains housekeeping information regarding the Channel Order such as user information and relevant transaction and communication dates. Of interest in this section is the Status Text Field. If a Channel Order has a status of Error, the reason as to why it is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

Information

Purchase Timestamp	11/6/2018 4:25 PM	Imported Time	8:44:12 PM
Payment Timestamp	11/6/2018 4:25 PM	Acknowledgement Required	<input type="checkbox"/>
Last Source Update	11/6/2018 4:25 PM	Acknowledgement Processed	
Last Import Update	7/1/2019 8:44 PM	Last Acknowledgement Sent	
Imported by User ID	WMS	Last Acknowledgement Result	
Imported Date	7/1/2019	Status Text	A Sales Order was built Successfully for Externi

Channel Order Actions

There are also several Actions that can be taken for a Channel Order. These are handy if the Channel Order is in error and you need to manually process the order.



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

Sales Channel Customers

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

MAGE1B2C

Listing Ordering APIs Actions Navigate Fewer options

General >

Order Management >

Customers

Customer Template	CSMTEMPLATE	Auto Create Contact	<input type="checkbox"/>
New Customer Behavi...	Auto Create	Default Customer Gro...	
Guest Customer Beha...	Auto Create	New Customer No. Se...	CSM-CUST

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

MAGE1B2C

Listing Ordering APIs Actions Navigate Fewer options

Sales Channel Customers Add Channel Customer

Order Management >

Customers

Customer Template	CSMTEMPLATE	Auto Create Contact	<input type="checkbox"/>
New Customer Behavi...	Auto Create	Default Customer Gro...	
Guest Customer Beha...	Auto Create	New Customer No. Se...	CSM-CUST

Listing Management >

Dynamics 365 Business Central

CSM CUSTOMERS | WORK DATE: 4/8/2019

Search + New Edit List Delete Open in Excel More options

SALES CHANNEL CODE	CHANNEL USER CODE	CHANNEL FIRST NAME	CHANNEL LAST NAME	INITIAL CHANNEL PASSWORD	GU... CH...	CUSTOMER NO.	CONTACT NO.	EXTERNAL ID
MAGE182C	asmith@yahoo.com	Alex	Smith		<input checked="" type="checkbox"/>	CSM-0000005	CT000033	
MAGE182C	belinda.newman@cronuscorp.n...	Linda	Newman		<input type="checkbox"/>	CSM-0000002	CT000027	141
MAGE182C	cstreitenberger@archerpoint.c...	Cindy	Streitenberger		<input checked="" type="checkbox"/>	CSM-0000011	CT000045	
MAGE182C	dblaisdell@archerpoint.com	Denise	Blaisdell		<input checked="" type="checkbox"/>	CSM-0000013	CT000049	
MAGE182C	ecombow@archerpoint.com	Elly	Combow		<input checked="" type="checkbox"/>	CSM-0000009	CT000041	
MAGE182C	eric.street@google.net	Eric	Street		<input type="checkbox"/>	CSM-0000001	CT000025	142
MAGE182C	gchen@suiteengine.com	Gary	Chen		<input checked="" type="checkbox"/>	CSM-0000008	CT000039	
MAGE182C	hmunster@theparlor.com	Herman	Munster		<input checked="" type="checkbox"/>	CSM-0000004	CT000031	
MAGE182C	hwang@suiteengine.com	Heather	Wang		<input type="checkbox"/>	CSM-0000006	CT000035	143
MAGE182C	mmarty@archerpoint.com	Marty	McMarty		<input checked="" type="checkbox"/>	CSM-0000012	CT000047	
MAGE182C	nmishra@archerpoint.com	Nilesh	Mishra		<input checked="" type="checkbox"/>	CSM-0000007	CT000037	144
MAGE182C	sandrastreet@streetco.com	Sandra	Street		<input type="checkbox"/>	CSM-0000003	CT000029	140
MAGE182C	tmarshello@suiteengine.com	Tom	Marshello		<input type="checkbox"/>	CSM-0000010	CT000043	145

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 is 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, updates the record with the ID and uses that as the Customer for Sales Order Building Purposes.


If the Sales Channel Customer Behavior is set to Sales Channel, then Business Central Sales Orders will always be built using the Customer specified in the Sales Channel Customer Template and will override the Sales Orders shipping and billing addresses to those found on the Channel Order.

If the Sales Channel Customer Behavior is set to Manual, and no match is found in the Sales Channel Customers table, then the Sales Order Creation process will fail. This may be useful in an B2B situation where new accounts who register on Magento need to be approved in Business Central before being setup as a customer. In this case, you would manually setup the CSM Sales Channel Customer record and link it to the appropriate Business Central customer (and optional contact). You would also need to set the Sales Channel Customer External ID to match the ID that Magento sent for the order.

Sending Customers from Business Central to Magento

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

Send Customers from the CSM Sales Channel


1. Choose the  icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the sales channel record from which you want to send customer information.
3. Choose the **Related** ribbon, then choose the **Add Channel Customer** action in the **Customers** group.
4. On the sales channel customer wizard, enter or use the AssistButton in the **Customer No.** field to select the customer you want to send.

5. Optionally, you can enter or use the AssistButton in the **Contact No.** field to use a contact as the basis for a channel customer.
6. Choose the **Next** button.
7. On the next page of the wizard, enter a unique value that will be used to identify the customer on the external sales channel. Typically the customer's e-mail address is entered here.
8. Choose the **Next** button, then choose the **Finish** button on the last page of the wizard.

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

Send Customers from Customer/Contact Cards

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

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

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

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

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

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

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

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

Sending Customers from Customer/Contact Lists

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

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

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

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

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

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

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

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

Sending Shipment Information

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

When you post a shipment for a Business Central Sales Order that relates to a CSM Channel Order, CSM intercepts that event and sends the shipment information. It will pull the tracking number from the Sales Order Package Tracking No. field. This information is entered in a new shipment line on the CSM order's **CSM Order Documents** FastTab. If the shipment is successfully sent to Magento, CSM retrieves the external ID that is assigned to the Magento shipment record and enters that on the CSM order document record, as well. 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.

Sending Invoice Information

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

When you post an invoice for a Business Central Sales Order that relates to a CSM Channel Order, CSM intercepts that event and sends the invoice information. This information is entered in a new invoice line on the CSM order's **CSM Order Documents** FastTab. If the invoice is successfully sent to Magento, CSM retrieves the external ID that is assigned to the Magento shipment record and enters that on the CSM order document record, as well. If for some reason the communication fails upon posting, the CSM automation will look for invoice documents that do not have an External ID and attempt to resend them.

Creating Sales Returns

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

1. Open the **CSM Channel Orders** list, then select an order for which the return will be issued.
2. Choose the **Create Sales Return Order** action in the ribbon on the **CSM Order** page.
3. CSM creates a new sales return order and updates the CSM order's sales return status to Open. You can navigate to this return directly from the CSM order by selecting the **Outstanding Return Order Amount** link in the **Sales Channel Order Statistics** FactBox.

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

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

Archiving Channel Orders

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

CSM Setup

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

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

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


Sales Channel Setup

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

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

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

Housekeeping Automation Setup

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

Channel Order Archiving

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

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

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

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

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

Viewing Archived CSM Channel Orders

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

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

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

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

Troubleshooting CSM Activities

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

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

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

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

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

Role Center Cues

A number of cues have been added to the [CSM Role Center](#) 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:

Requires Attention

<p>Orders with Errors</p> <p style="font-size: 2em; font-weight: bold;">34</p> <hr style="width: 20%; margin: 5px auto;"/> <p>> See more</p>	<p>Outstanding Orders to Channel</p> <p style="font-size: 2em; font-weight: bold;">7</p> <hr style="width: 20%; margin: 5px auto;"/> <p>> See more</p>
<p>Outstanding Listings to Channel</p> <p style="font-size: 2em; font-weight: bold;">40</p> <hr style="width: 20%; margin: 5px auto;"/> <p>> See more</p>	<p>Delayed Automation</p> <p style="font-size: 2em; font-weight: bold;">11</p> <hr style="width: 20%; margin: 5px auto;"/> <p>> See more</p>

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 08/01/2020 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.

CSM Additional Details

CSM API Data

If you used the Quick setup wizard, the Magento 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. Our example value tells us that we are communicating with a Magento 1.xx external system.	MAGENTO_M1
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 (Magento, Magento 2.xx, Amazon, etc.) and may even require a 2 nd API set for an additional Magento 1.x instance you may deploy.	Magento version 1.96 Soap V2 API

API Set Behavior	This tells us which channel we are dealing with, for Magento 1.x hosts, you should choose Magento from the dropdown.	Magento
Session API Function Code	This indicates the API Function used to maintain session management with the Channel. For Magento 1.x hosts, you should always enter LOGIN to this field.	LOGIN
Session Timeout	This is a duration value that determines when a session should be refreshed. In our example, we have specified 5 minutes. This means that when communication is attempted with the channel, if the session is more than 5 minutes old, CSM will start a new session with the channel (Magento).	5 minutes
HTTP Web Request Timeout	The amount of time, in seconds, that CSM will wait for a response to a request made to the channel. We recommend entering a value of 60,000 or above. If your Magento server is under configured, it may be slow to respond, in our example, we set the value to 600000.	600,000
Host	This is the host URL endpoint for soap services on your Magento 1.xx server. Normally it is your Magento store URL with an additional path of /api/v2_soap/index/	http://mymagneto.mycompany.com/api/v2_soap/index/
User ID	This is the Magento Soap/xml-RPC user that CSM should authenticate its API Calls with. See below example Magento screen shot. This user should be assigned a Magento user roll that gives it access to all API's.	Use the Soap/xml-RPC User you setup on Magento
API Key	This is the Magento Soap/xml-RPC users API Key which CSM authenticates API Calls with. See below example Magento screen shot.	Use the api key you defined on Magento for the User ID

Appendix A: CSM Role Center Headline Data

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

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

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

Field	Description	Value Type	Example Value
Edit List	This is the ability to edit the Role Center Headline Data within the table.	N/A	N/A
Update CSM Role Center Headlines	This will populate CSM Role Center Headline Data with default info to display in the CSM Administrator Role Center page.	N/A	N/A
Code	This is the unique value to identify this headline.	character limit- 20	NEWTOCSM

Field	Description	Value Type	Example Value
		all caps alphabetic and/or numeric value	
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	Status of the headline used to determine if it is visible.	Pending/ Active/ Active Dates/ Inactive	Active
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

Field	Description	Value Type	Example Value
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
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	HEADLINEACTIONO PENCSMSETUP

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 B: 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 Magento, if the “Bearer Token” 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 *Bearer Token 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.