



CSM FOR SHOPIFY

An App by Suite Engine

Microsoft Dynamics 365 Business Central

Order Management Setup

Version: 4.7

ORDER MANAGEMENT SETUP

CSM for Shopify 4.7 (D365 Business Central Target Version 23.0: Platform 23.0.14587.0+ Application 23.1.13431.13546)

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

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

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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 Shopify Extension

The CSM for Shopify 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 Shopify*: this facilitates communication between CSM Core and an external Shopify 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 Shopify*
 - *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**.

CSM Setup

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

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

- Search for "CSM Setup"
- From the CSM Administrator Role Center, chose the "CSM" action, then select the "CSM Setup" option.
- Wait for the CSM Administrator Role Center Insights pane to display "New to CSM?" and click the hyperlink.

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

Creating and Managing Your CSM Subscription

If CSM for Shopify 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 Shopify 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 Shopify. If you wish to use CSM for Shopify 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 Shopify 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 Shopify 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 Shopify.

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.

Configuring Shopify for CSM Access

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

To generate credentials, it is necessary to set up a custom app in Shopify. A custom app identifies the access that is granted to different record types. When an API call is made according to a custom app's credentials, Shopify reviews the access scope to determine whether the request is permissible.

To set up a custom app:

1. Log in to your Shopify account.
2. Choose the **Apps** menu item in the lefthand area of the administrator dashboard.

3. On the **Apps** page, choose the **Develop apps** button.
4. On the **App development** page, choose the **Create an app** button.
5. On the **Create an app** page, enter a name for the app and assign someone in your organization as the app developer.
6. Choose the **Create app** button. Shopify will open a setup page for the newly-created app.
7. On the **Overview** tab, choose the **Configure Admin API** scopes button.
8. Enable read and write access for the following API access scope areas:
 - Assigned fulfillment orders
 - Inventory
 - Locations (only read access is available)
 - Merchant-managed fulfillment orders
 - Order editing
 - Orders
 - Product listings
 - Products
9. Choose the **Save** button.
10. Choose the **API credentials** tab.
11. Choose the **Install App** button, then choose the **Install** button on the confirmation screen.

Shopify will generate an admin access API token for the newly-installed app.

12. Reveal the access token API and copy it to a secure place.

Note: Shopify will only reveal this API one time. Make certain that you save this value to a secure, accessible location, as you will not be able to obtain it at a later time.



13. Copy and paste the API key from this page to an accessible location.

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

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 Shopify Setup Wizard

Once you have set up a trial subscription and obtained the necessary credentials from Shopify, you are ready to set up your CSM for Shopify solution. To assist you in the creation of your primary sale channel, CSM for Shopify includes a setup wizard that streamlines the setup process. This wizard is launched from the **CSM Setup** page by choosing the **Actions** ribbon, then choosing the **Shopify Quick Setup** action.

On the first page of the wizard, it is recommended you enable all presented setup options for loading CSM triggers and Shopify 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.

Field	Description	Example Value
Shopify API Set Code	This is a unique code that identifies the API set. It can be any value you wish, but we recommend naming it something meaningful that describes the external source the API set communicates with.	SHOPIFY
Shopify API Set Description	This is a text description of the API set. It can be any value you wish, but we recommend using a meaningful description. Note, that you may deal with other channels in the future (Shopify,	Shopify Rest APIs version 2019-10

	Amazon, etc.). For CSM for Shopify, the CSM API Set defines the API's for multiple Shopify Stores.	
Shopify Host Name	This can be obtained from URL of your Shopify account. When you are logged into the administrative portal, the host name is found between the "https://" and ".myshopify.com" portions of the user. For example, if we have a URL of "https://suiteengine-csm.myshopify.com/admin", the host name would be "suiteengine-csm".	suiteengine-csm
Shopify API Key	Enter the API key you copied from the custom app in your Shopify environment.	
Shopify API Password	Enter the admin access token you copied from the custom app in your Shopify environment.	

On the third page of the wizard, you will specify how you want to identify your Shopify 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.	SHOPIFY_B2C
Description	This is a text description of the Sales Channel.	Shopify Retail Store (B2C)

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

Once the channel setup is complete, choose the **Finish** button on the final page of the wizard.

Open the CSM Setup page and set the Log Retention and API Message Retention fields on the Logging Options FastTab. These determine how long API message information and logs are retained.

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

Enter Channel Credentials in Business Central

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

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

- **Scenario 1:** You have a United States presence in 15 states, and have defined a separate sales channel for each state. In this scenario, you may have a single set of credentials that you wish to apply to all 15 channels. In such

a scenario, you set up the credentials for your Georgia channel, then make the Georgia channel your credentialing channel for your channels in Florida, Texas, etc. When you process an API activity through your Florida channel, for example, the credentials that have been set up for Georgia will be used.

- **Scenario 2:** You have a North American and a European presence, with a separate sales channel in each region. In this case, you may have two separate sets of credentials for North America versus Europe. In such a scenario, you assign these separate credentials to each of these channels.

The credentials that you entered in the setup wizard are used to validate requests to send data between Business Central and an external channel environment.

Certain API calls are performed against specific sales channel records and require the presence of credentials at the sales channel record level. In some scenarios, it may be that an organization has multiple sales channels that all use the same credentials. When an API call is made against a sales channel, CSM will use the credentials that exist for the channel's defined credentialing sales channel to validate that API process.

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

Setting Up a Shopify POS Channel

CSM for Shopify contains support for Shopify's POS functionality. If you are using Shopify POS, you can set up a dedicated sales channel in Business Central for your POS orders.

To set up a Shopify POS channel:

1. Go to the 'CSM Sales Channel' card. Click on '**Related**' > '**Setup Actions**' > '**Create POS Channel**'. This triggers the 'CSM Shopify POS Wizard'.
2. For the 1st Window of the 'CSM Shopify POS Wizard'
 - Select from which Sales Channel do you want to create the new POS channel (where you want to copy the information for the new channel)
 - Switch on the 'Load Automation'
3. For the 2nd Window of the 'CSM Shopify POS Wizard'
 - Select and turn on the switch of the data that you wish/need to copy from the Sales Channel previously selected.
4. For the 3rd Window of the 'CSM Shopify POS Wizard'
 - Verify the Sales Channel code, description and assign the Shopify POS Location ID.

Retrieve the Shopify POS Location ID


1. Go to the Shopify Sales Channel.
2. Click on '**Navigation**' > '**Inventory Locations**'

The primary Shopify Inventory location, should be mapped to a selected Business Central Inventory Location.

3. "Channel Inventory Location ID" = the location ID which can be found on the Shopify Admin by navigating to the Shopify Location in settings, then observing the ID shown in the URL. Now copy the Shopify POS Location ID.

Verify Channel Connectivity and Retrieve Your First Channel Orders

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

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

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


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

1. Choose the  icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open any sales channel record that has the API set for which you want to set a starting date for order retrieval.
3. On the **CSM Sales Channel** page, choose the **Related** ribbon, then choose the **Starting Order Date Retrieval** action in the **Setup Actions** menu.
4. On the **CSM User Input** page, enter your desired starting date and time.
5. 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:

Choose the  icon, enter **CSM Sales Channels**, and then choose the related link.

Open the sales channel record for which you want to assign a starting date and time.

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.

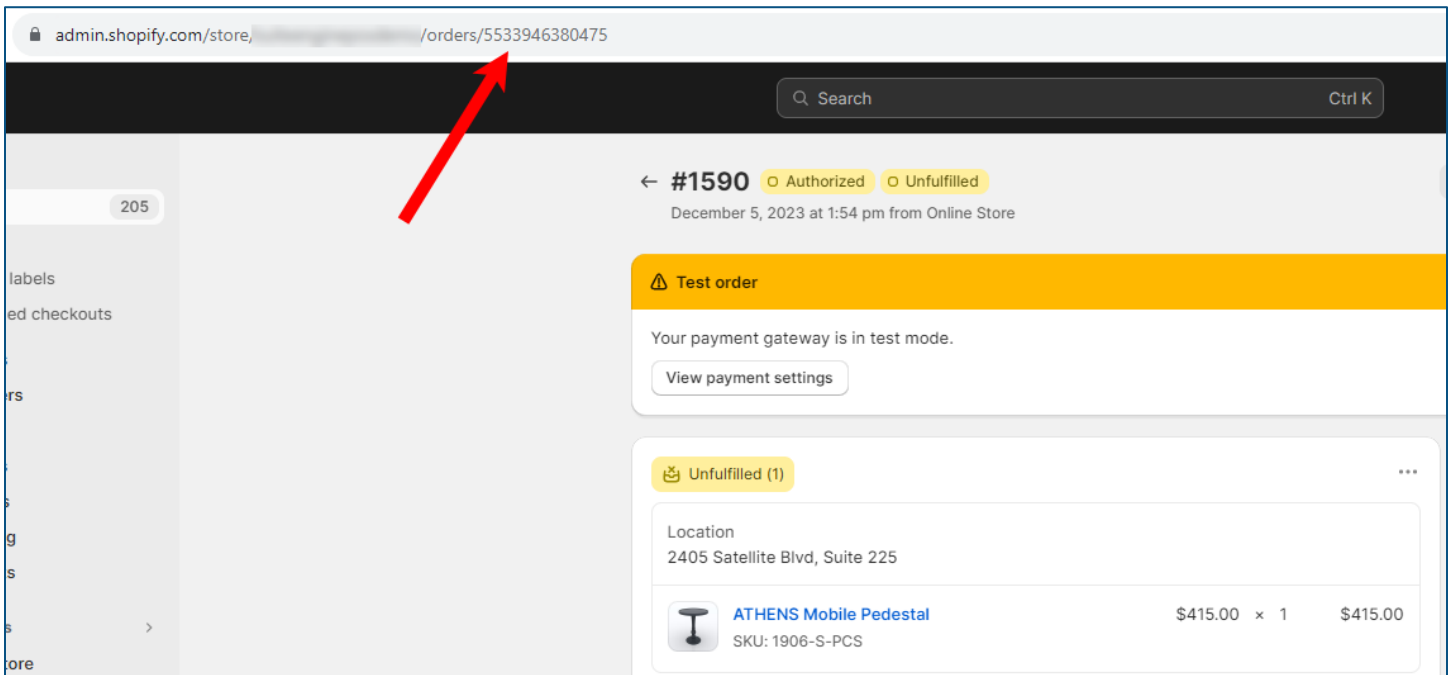
When you have finished specifying starting dates and times for your sales channels, you can retrieve orders into Business Central. From the CSM Administrator Role Center, choose the **Run Order Automation Now** action. The related API automation routines will be run by CSM, and any Shopify orders that 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.

Retrieving a Single Channel Order

You can also retrieve a single channel order. This is not practical from a day-to-day order processing perspective, but can be useful in testing and troubleshooting scenarios where you have a single order you need to analyze.

To retrieve a single channel order:

1. On the **CSM Sales Channel** page, choose the **Actions** ribbon, then choose the **Get Specific Channel Order** action.
2. On the **Retrieve Single Channel Order** page, enter the order number you want to retrieve. You must enter the order's internally assigned order number, rather than the outward-facing number that is assigned from a defined number series. For example, if we reference the following screenshot, we would use order number *5533946380475*, not *1590*:



3. Choose the **OK** button.

CSM will retrieve the specified order's information from Shopify and create a channel order for it in Business Central.

CSM Functional Settings and Cross References

This section will go through the settings that will customize your CSM experience and cross reference your data in Business Central to like data in Shopify, 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 e-commerce or marketplace store. For example, if you have 2 Shopify Stores defined, one B2C, the other B2B, they would be setup as two Sales Channels in CSM. If you use the Shopify Marketplace, you may sell on Shopify using the FBA (Fulfilled by Shopify) model, and / or the FBM (Fulfilled by Merchant) model. Each of those are different Sales Channels in CSM.

If you used the Shopify 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, 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.

Sales Channel card and POS Sales Channel card walkthrough 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.	SHOPIFYB2C
Description	This is a text description of the Sales Channel.	Shopify Retail Consumer Site
Order Management FastTab		
Field	Description	Example Value
Inventory Location	The Business Central inventory location that supplies this store. Business Central Sales Orders Created for this Sales Channel will specify this inventory location. Listing Management will also use this value in its inventory availability calculation.	MAIN
SO No. Series	The No. Series that should be used for Sales Order Number when build Business Central Sales Orders for this Sales Channel.	CSM-ORD-SHP
Channel Dimension	If populated, this Business Central Financial Dimension will be set on all Business Central Sales Orders created from this Sales Channel. Primary Dimension 1.	SALES
Channel Dimension 2	If populated, this Business Central Financial Dimension will be set on all Business Central Sales Orders created from this Sales Channel. Primary Dimension 2.	
SO Build Codeunit	The Object number of the Codeunit that should create Business Central 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</p>	<Sales Channel Code>-<Order ID>

	<p>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>	
Retrieve Order Risk	<p>Enable this field to instruct CSM to retrieve risk information for Shopify orders. When an order is placed in Shopify, a fraud analysis is performed and a risk level is assigned. You can use an order's retrieved risk information in conjunction with CSM's sales operation rules to automatically prevent the creation or processing of sales orders that exceed a particular risk level.</p> <p>Note: when retrieving order risk information from Shopify, CSM must make a separate API call for each order. Depending on order volume, this can result in a significant number of API calls. If you are not interested in retrieving order risk information, it is recommended that you leave this setting disabled.</p>	
Start Processing Date Time	<p>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.</p>	
Payment Behavior	<p>Indicates how this sales channel processes payments. For all Shopify Sales Channels, this should be set to Channel.</p>	Channel
Payment Method Code	<p>The Code of the Business Central Payment Method which should be used. Payment Behavior: Payments, this will be the default value. Payment Behavior: Channel, this will be the Payment method used on all orders. This can be blank for CSM for Shopify.</p> <p>Please assign a payment method for the Shopify POS sales channel. The Payment method must have 'Bal.Account No' = blank.</p>	
Send Shipment Information	<p>Indicates whether CSM should send shipment information to the Channel. For POS channel, must be set up as 'FALSE'</p>	<p>Yes</p> <p>POS = False</p>
Send Shipment When	<p>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</p>	Immediate

	shipment information); Manual: Shipment information is sent by a user who presses the Send Shipment Information action button on the Channel Order card.	
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 Shopify. This results in CSM sending less data to Shopify, 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 Shopify. This results in CSM sending less data to Shopify, 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. For POS channel, must be set up as 'FALSE'	Yes POS = False
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 Shopify, this is dependent by payment method. If your payment method Behavior is set to payments (which it should be for Shopify implementations), CSM uses the Send Invoice Capture value set for each Payment Method (See setting up Channel Payment Methods later in this document). For POS channel, must be set up as 'FALSE'	True POS = False
Return Order Behavior fields	The Send Return Order Information and Send Return Order When fields exist to support integrations to other eCommerce channels. The concept of a return order does not currently exist within Shopify, and these fields can be ignored for your Shopify channels.	N/A
Return Receipt Behavior fields	The Send Return Rcpt. Information and Send Return Rcpt. Information When fields exist to support integrations to other eCommerce channels. The concept of a return order does not currently exist within Shopify, and these fields can be ignored for your Shopify channels.	N/A
Send Refund Cr. Memo	Enable this field to indicate that you want to send refund credit memo information from Business Central to Shopify.	Yes
Send Refund Cr. Memo When	If you have enabled the functionality to send credit memo information to Shopify, select the method by which it will be sent: <ul style="list-style-type: none"> <i>Immediate</i>: will send automatically when the return order/credit memo is posted. 	

	<ul style="list-style-type: none"> • <i>Scheduled</i>: will be sent when the SENDCREDITMEMO automation runs. • <i>Manual</i>: will be sent when the user checks the External Requires Update field on the CSM order document line and uses the Send to Channel action on the CSM Order page. 	
Deny Unbalanced Auto Release	<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>Note: <i>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>	
Deny Unbalanced Auto Post	<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>Note: <i>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>	
Address 2 Behavior	<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. 	
Order Total Discount Allocation	<p>Select the method by which order discount amounts will be allocated to channel orders. By default, Shopify 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</p>	

	<p>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. <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 Shopify implementation does not include Gift wrap services. If you select Line, then when CSM creates the Business Central Sales Order for a Shopify 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 Business Central Sales Order for a Shopify 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 normal Business Central logic. In this case, Business Central will calculate the Sales Tax the same way it would with any Sales Order, regardless of what Shopify calculated and collected. If you select Line, then when CSM creates the Business Central Sales Order for a Shopify Order, the Tax Liable Flag will be set to FALSE (which keeps Business Central from calculating sales tax), and Sales Order Lines (one for each item, plus lines for tax	Line

	collected on order level charges (shipping, gift wrap, other charges)) will be added to account for the Sales Tax Shopify calculated and collected.	
Sales Tax Line Type	If you choose Line as the Sales Tax Behavior, this field specifies the Sales Order Line Type which should be used for the Sales Tax Lines CSM creates. The values can be G/L Account, Item, Resource, or Charge (Item).	G/L Account
Sales Tax Order Line No.	If you choose Line as the Sales Tax Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Sales Tax Line Type chosen).	22720
Start Processing Date Time	Only return document created after this date and time will be converted into sales credit memo.	9/29/2021 3:20PM
Cr. Memo build Codeunit	(APPLICABLE TO POS SALES CHANNEL) The Codeunit ID to use when building a Sales Cr. Memo for a CSM Order from this channel.	70338215
Credit Memo No. Series	(APPLICABLE TO POS SALES CHANNEL) The number series to use when creating new Business Central Sales Cr. Memo from this Sales Channels Channel Orders.	CSM-CR
Refund Discrepancy Behavior	<p>Indicate how you want the sales channel to address scenarios where a retrieved refund amount differs the amount that is entered on the credit memo that is created in Business Central. Options are:</p> <ul style="list-style-type: none"> <i>None</i>: any refund discrepancies will be ignored by CSM. <i>Line</i>: an additional line in the amount of the discrepancy will be added to the sales credit memo. 	Line
Refund Discrepancy Line Type	If you have indicated that you want CSM to create an additional line for refund discrepancies on sales credit memos, enter or use the AssistButton to choose the type of account to which these discrepancies will be recorded. You can indicate that refund discrepancies should be posted to a G/L account, item, resource, fixed asset, or item charge.	G/L Account
Refund Discrepancy Line No.	Enter or use the AssistButton to assign the account to which refund discrepancies will be recorded. The record type is dependent on the selection in the Refund Discrepancy Line Type field.	
Return Location	Enter or use the AssistButton to assign the Business Central location to which you want to receive items that are being returned by customers that you want to re-stock. This location is assigned to credit memos that are created by CSM when refunds that are initiated through Shopify are retrieved into Business Central.	MAIN
Returnless Location	Enter or use the AssistButton to assign the Business Central location to which you want to receive items that are being returned by customers that you want to credit but do not want to re-stock (typically this is a virtual location). This location is assigned to credit memos that are created by CSM when refunds that are initiated through Shopify are retrieved into Business Central.	RETURNLESS

Gift Card FastTab

Field	Description	Example Value
Default Gift Card Account	Enter or use the AssistButton to select the default general ledger account to which newly-issued gift card amounts will be posted. When a new gift card is being issued from within Business Central, the application will suggest this account by default, although it can be manually changed, if necessary.	Cash Account
Default Gift Card Balancing Account	Enter or use the AssistButton to select the default general ledger account to which the balancing entry for newly-issued gift card amounts will be posted. When a new gift card is being issued from within Business Central, the application will suggest this balancing account by default, although it can be manually changed, if necessary.	Liability Account

Customers FastTab

Field	Description	Example Value
Customer Template	A valid Business Central 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 Shopify, if the customer creates a new Shopify account when checking out, or for existing Shopify customers that have not been defined to CSM (either by setting up the customer as a Sales Channel Customer, or receiving a Shopify Order for the customer), CSM considers them a new customer. If the behavior is set to Auto Create, CSM will automatically create a new Business Central customer and associated CSM Channel Customer based on the Customer Template defined above, this will occur when CSM builds the Business Central 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 Business Central 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 Shopify 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 Business Central customer and associated CSM Channel Customer based on the Customer Template defined above, this will occur when CSM builds the Business Central 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	Auto Create

	automatically create a customer, and the Sales Order build process will fail unless a Channel Customer is manually setup and linked to a valid Business Central customer.	
Auto Create Contact	Indicates whether CSM will also automatically create a Business Central contact for any new customers CSM creates.	Yes
Default Customer Group ID.	This field is currently not used for Shopify and is reserved for future functionality.	
New Customer No. Series	Indicates which No. Series should be used when CSM automatically creates a new Business Central customer.	CSM-CUST

POS LOCATION ID FastTab

Field	Description	Example Value
API Channel Identifier	For Shopify, this will be the Shopify Store Name that is used for URL access to the store. In Shopify 2.0 The store name moved to the website ID field = Store Name. If you have already installed CSM for Shopify and the website ID is blank, the field will grab the shop name from the API Channel Identifier.	suiteengine-csm
Shop Name	This value is not used for Shopify	1
API Set Code	Identifies the API Set code that should be used for API communication with Shopify. This should be the value that you used to setup the Shopify API Set in the CSM API Sets section earlier in this document.	SHOIFY
API User ID	This is the API Key from the private app setup on Shopify that authorizes CSM access to the API's	Your API key
API User Password	For API calls where the URL is store specific, this is the User ID portion of the credentials for the API Call.	Your API password

POS - Channel API Data FastTab

AP Logging Level	Fence used to determine what should be logged	
Import Object Name	Fence used to determine what should be logged	
POS	Enable POS functionality	
POS Location ID	The POS Location ID of the Shopify Sales Channel.	
Shop Name	The POS Location ID of the Shopify Sales Channel.	
API Set Code	Indicates which API Set to use when communicating with the Channel.	
API User ID	For API calls where the URL is store-specific, this is the User ID portion of the credentials for the API Call.	

API User Password


For API calls where the URL is store-specific, this is the User ID portion of the credentials for the API Call.

CSM Shipping Methods

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

CSM shipping methods correspond to “delivery method” records in Shopify. Shopify 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. Shopify supports a number of standard delivery methods, and it is not possible for Shopify 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 Shopify delivery methods. When shipping information is sent between your Business Central and Shopify 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 Shopify’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 Shopify. 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 Shopify.

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.


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 Shopify. Shopify uses this record type to represent specific payment processes, such as Stripe and PayPal.

It is recommended that you use CSM payment methods to link your Business Central payment method codes and your Shopify payment methods. When payment information is sent between your Business Central and Shopify environments, this association will ensure that the proper payment information is maintained in both platforms.

Shopify does not offer API support for payment method retrieval, meaning it is not possible to obtain these records directly from your connected channel. However, CSM includes a dataload that includes Shopify's default payment methods. You can automatically load new CSM payment method records that are based on these defaults:

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 Shopify. 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 Shopify 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.


Note: Shopify does not permit multiple credit card payments for a given transaction. When you are defining a CSM payment method that is mapped to shopify_payments, the **Single Capture** field should be enabled.

- **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 included with the CSM data load. If other payment methods are present in your Shopify environment, you must manually set up the related CSM payment method records in Business Central.

CSM Shipping Carriers

It is recommended that you use CSM shipping carriers to link your Business Central shipping agent codes and your Shopify shipping carriers. When shipping information is sent between your Business Central and Shopify 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 Shopify's default records:

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

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

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

CSM Tax Groups

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

CSM Price Groups

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

Gift Cards

It is possible to retrieve and issue Shopify gift cards from a CSM sales channel in Business Central. To view information about a Shopify channel's gift cards, choose the **Related** ribbon, then choose the **Gift Cards** action. This will open a page that presents any gift cards that have been issued for the channel. Information about each gift card is presented on each line, including the gift card's unique ID, starting and remaining balance, and dates of expiration or disablement. Filter options at the top of the page allow you to include or exclude zero balance, expired, and disabled gift cards from the list.

To retrieve active gift cards from your Shopify platform, choose the **Actions** ribbon, then choose the **Retrieves Active Gift Cards** action. CSM will retrieve all active gift cards from Shopify. Subsequent updates to gift cards will be communicated through CSM's automation routines.

You can also issue new gift cards directly from the **Gift Cards** page in Business Central:

1. Choose the **Issue Gift Card** action in the ribbon.
2. In the **General** FastTab on the **Gift Card** page, specify the initial amount, expiration date, and, if desired, any additional notes regarding the gift card.
3. If you have defined gift card posting accounts for the Shopify sales channel, the **Post to GL** field on the **Posting** FastTab will be automatically enabled. It is recommended that this stay enabled, but you can manually disable it, if necessary.
4. Choose the **OK** button.

CSM will generate a new gift card and present a confirmation message that contains the gift card's unique code.

Note: the full content of the gift card code will only be available one time in this confirmation message. Once this message is closed, it will no longer be possible to obtain this full code. This is in line with Shopify's native workflow; if you issue a gift card from the Shopify administrative portal, its code can only be obtained one time at the initial time of issue.

5. Choose the **OK** button to close the confirmation message.

The **Gift Cards** page will be updated with a new line for the issued gift card.


CSM Order Status Matrix

The Order Status Matrix is data that CSM uses to determine a Channel Order Status based on information received from Shopify. 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 Shopify administration portal, or system-generated notes) from Shopify. 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.

1. Go to the Role Center.
2. Click on “CSM” > “CSM Automation”

Dynamics 365 Business Central

Sandbox

CSM AUTOMATION LIST | WORK DATE: 4/6/2020

✓ SAVED

Search + New Edit List Delete Open in Excel

Sales Channel Code	Automation Type	Sequence	Code	Codeunit ID Code	Order Status	Channel Status Value	NAV Order Status	Description
→ SHOPIFYB2C	Fulfillment	140	SHIPMENTTRACKING	ORDERMGT...	Not Applicabl		Not Applicabl	Sends Shipme
SHOPIFYB2C	Fulfillment	145	SENDINVOICE	ORDERMGT...	Not Applica...		Not Applica...	Sends Invoice I
SHOPIFYB2C	API	240	SHOPIFYORDERLIST	ORDERMGT...	Not Applica...		Not Applica...	Retrieves Orde
SHOPIFYB2C	Order	1410	BUILDSALESORDER	ORDERMGT...	New	processing	No Order	Build Shopify S
SHOPIFYB2C	Order	1420	BUILDSALESORDER	ORDERMGT...	New	pending	No Order	Build Shopify S
SHOPIFYB2C	Listing	3100	AVAILABILITY	LISTINGMG...	Not Applica...		Not Applica...	Sends Item Av
SHOPIFYB2C	Listing	3105	CATEGORY	LISTINGMG...	Not Applica...		Not Applica...	Sends Channel
SHOPIFYB2C	Listing	3110	ATTRIBUTESET	LISTINGMG...	Not Applica...		Not Applica...	Sends Attribute
SHOPIFYB2C	Listing	3115	ATTRIBUTE	LISTINGMG...	Not Applica...		Not Applica...	Sends Attribute
SHOPIFYB2C	Listing	3120	ATTRSETSYCHSEND	LISTINGMG...	Not Applica...		Not Applica...	Performs the A
SHOPIFYB2C	Listing	3125	PRODUCTLISTING	LISTINGMG...	Not Applica...		Not Applica...	Sends Product
	Housekeepi...	999999	HOUSEKEEPING	ORDERMGT...	Not Applica...		Not Applica...	CSM Housekee

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

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

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

These default codeunit ID code values are assigned to all of the automation routines that are loaded as part of your *CSM for Shopify* 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 Shopify.

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 Shopify. 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 Shopify		
Field	Description	Example Value
Sales Channel	The Sales Channel for which Shipping Information should be sent.	SHOPIFYB2C
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.	140
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 .	ORDERMGTDEFAULT
Order Status	This value is Not Applicable for Send Shipment information to Shopify.	Not Applicable
Channel Status Value	This value is Not Applicable for Send Shipment information to Shopify.	
BC Order Status	This value is Not Applicable for Send Shipment information to Shopify.	

Description	A description of the entry.	Sends Shipment Information to Shopify
Auto Create SO	This value is Not Applicable for Send Shipment information to Shopify.	Not Checked
Auto Release SO	This value is Not Applicable for Send Shipment information to Shopify.	Not Checked
Auto Post SO	This value is Not Applicable for Send Shipment information to Shopify.	Not Checked
API Set Code	This value should be the API Set the Sales Channel uses	SHOIFY
API Function Code	This value is Not Applicable for Send Shipment information to Shopify.	
Next Automation Code	This value is Not Applicable for Send Shipment information to Shopify.	
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 Shopify. 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 Shopify		
Field	Description	Example Value
Sales Channel	The Sales Channel for which Invoice Information should be sent.	SHOIFYB2C
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.	145
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	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 Send Invoice information to Shopify.	Not Applicable
Channel Status Value	This value is Not Applicable for Send Invoice information to Shopify.	
BC Order Status	This value is Not Applicable for Send Invoice information to Shopify.	
Description	A description of the entry.	Sends Invoice Information to Shopify
Auto Create SO	This value is Not Applicable for Send Invoice information to Shopify.	Not Checked
Auto Release SO	This value is Not Applicable for Send Invoice information to Shopify.	Not Checked
Auto Post SO	This value is Not Applicable for Send Invoice information to Shopify.	Not Checked
API Set Code	This value should be the API Set the Sales Channel uses	SHOIFY
API Function Code	This value is Not Applicable for Send Invoice information to Shopify.	
Next Automation Code	This value is Not Applicable for Send Invoice information to Shopify.	
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 the main order retrieval for CSM, this API looks for order information that is new, or has changed since the last time the function ran.

SHOIFY Order List:

This task will automatically retrieve any orders from Shopify 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.

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

Automation Task – Retrieve Shopify Orders		
Field	Description	Example Value
Sales Channel	The Sales Channel for which order information should be retrieved.	SHOIFYB2C

Automation Type	Should always be API.	API
Sequence	The Sequence in the Automation run that Order List information is retrieved.	240
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.	SHOIFYORDERLIST
Codeunit ID Code	When CSM automation codeunits are run, they can be configured to execute automation routines that share a particular codeunit. By default, all CSM automation routines share the same automation codeunit ID, but you can modify this value if you want to run different groups of automation routines via separate job queues .	ORDERMGTDEFAULT
Order Status	This value is Not Applicable for the API Sales Order List.	Not Applicable
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 Shopify
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 Shopify API Set to use when executing the Task	SHOIFY
API Function Code	The API Function Code to Use when executing the Task. This will almost always be SALESORDERLIST for Shopify 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 can specify additional processing to occur for each valid order. For example, the Order Automation task can create, release and even post a Sales Order.

Build Sales Order

This task will automatically perform additional processing for any order that has reached the Channel Status Value specified in the Task. For example, if a credit card payment was authorized by Shopify, Shopify would normally set its

status to “processing” for a valid order. For a purchase order payment, Shopify would set its status to pending. With this automation task, you specify which Shopify status the task should look for before processing 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 – Build Sales Order		
Field	Description	Example Value
Sales Channel	The Sales Channel for which order line Information should be retrieved and processed.	SHOPIFYB2C
Automation Type	Should always be Order.	Order
Sequence	The Sequence in the Automation run that Order Line information is retrieved.	1400
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.	BUILDSALESORDER
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 Shopify this is normally New which designates an order that is ready for a Business Central Sales Order to be built	New
Channel Status Value	The Shopify 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.	Build Shopify Sales Order when this status appears
Auto Create SO	If you wish CSM to automatically create a Business Central Sales Order for the Shopify 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, Shopify POS orders are fulfilled (shipped) by Shopify, so in this case, we want CSM to fully process the completed order. Shopify 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 Shopify. This however is not normally the case, in which it should not be checked.	Not Checked
API Set Code	This task does not need this value	

API Function Code	This task does not need this value	
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 Build Sales Order task defined for CSM to process different Shopify Status. For example, you could have one line that Creates (but does not release) a Business Central Sales Order when the Shopify Status is pending, and another line that creates and releases a Business Central Sales Order when the Shopify Status is processing. Keep in mind that the Shopify status is case sensitive and should match the exact status as Shopify 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.

Shopify POS

The CSM for Shopify app works seamlessly with the Shopify POS application, allowing you to take orders on your point-of-sale tablets or cashier computers.

Prerequisites:

- Download the “**Shopify Point of Sales (POS)**” app (tablet, phone, PC)
- Perform test transactions creating a customer with your personal email address, so you can see the invoice that the customer would receive (or use your phone number and text the link of the receipt from the POS app).
- Taxes are calculated automatically by Shopify POS App according to the address identified associated with the store, or if you have checked the Tax exempted when creating a customer, then the tax will always be equal to zero for that customer.

POS transaction flow:

1. Set up your Shopify POS channels according to the instructions in the previous sections.
2. Register the transaction on the Shopify POS device > Checkout
3. Go to BC and run the Automation. This action will pull into BC CSM Channel Orders list, the new order(s) just created through the Shopify POS app.
4. If your items in BC have different 'Item No.' than the Shopify SKU, please either create the Item identifier, cross reference or 'CSM Channel Listing' (**for how to create listings, please refer to the document CSM Listing Management for Shopify on our website help section**)
 - CSM automatically creates and posts a Sales Invoice for the CSM Channel Order
 - CSM automatically creates, posts, and applies a Payment for the CSM Channel Order if you have set up the payment method in BC to do so with a balancing G/L account. If that is not the case and you want to process the payment manually on Business Central (BC):
5. From the CSM Channel Order card, go to the 'CSM Order Documents' > Click on the 'Payment' you want to post and apply > click on 'Manage' > click on 'Post Payment'. Posting a payment from the 'CSM Order' does two actions:
 - Creates a posted document for 'Payment' on the Customer ledger entries.
 - Automatically applies the Payment towards the 'Posted Sales Invoice' of the 'CSM Order'.
6. You can confirm this by clicking on the 'Remaining Amount' field of the 'Invoice' row of the 'CSM Order Document' FastTab.
7. After all Payments are either automatically or manually applied, the CSM Order's 'Outstanding SO Amount' becomes zero.

CSM for Shopify supports multiple ways of payment. If for example a customer pays in cash and part in card, you will see reflected on the 'CSM Order Documents' the two corresponding payments.

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 Shopify 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 four 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.
- **Zero Quantity Shipment Lines:** a shipment line has zero outstanding quantity.
- **High Risk Orders:** a retrieved order has been identified by Shopify as being at high risk for fraudulent activity.

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.

Return to the CSM Role Center and press Actions > Tasks > Run Order Automation Now (Alternatively, you could press the Run Order Automation Now button in the Activities area of the role center). The automation is normally a scheduled job, but by pressing this button, we are forcing it to run immediately.

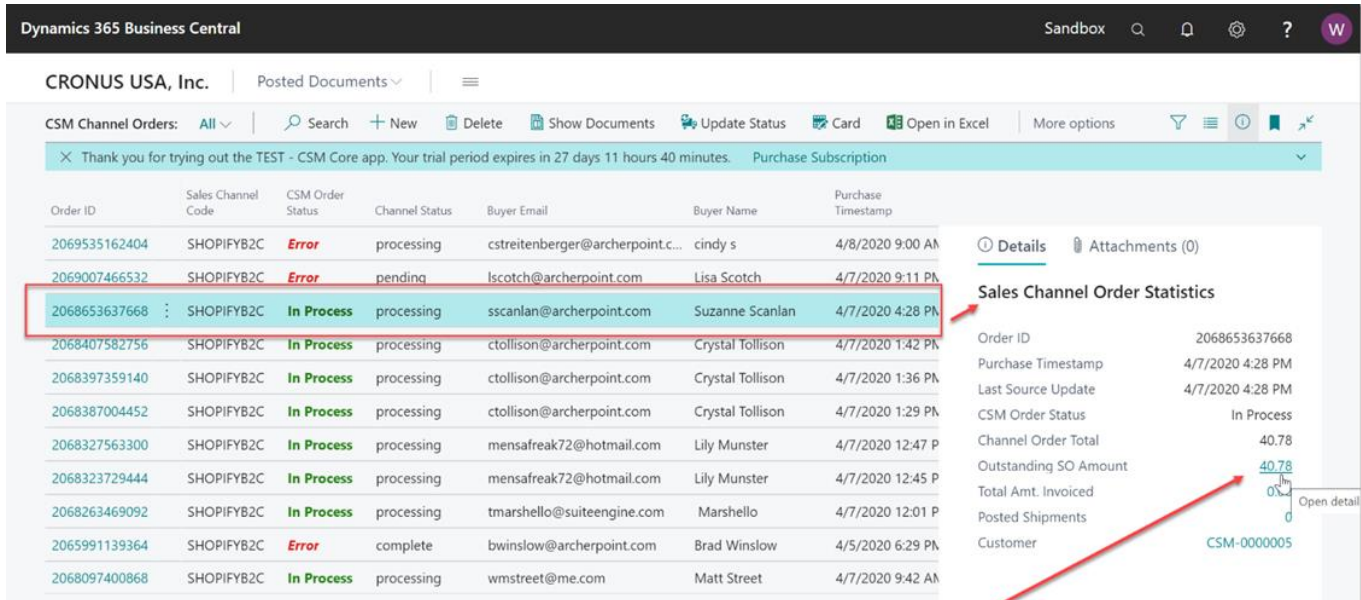
Viewing Channel Orders

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

1. Go to the Role center
2. Click on “CSM Sales Channel Orders”

This will list all Channel Orders with a color-coded status. A CSM Channel Order is essentially the data received from Shopify 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	Buyer Name	Purchase Timestamp
2069535162404	SHOPIFYB2C	Error	processing	cstreitenberger@archerpoint.c...	cindy s	4/8/2020 9:00 AM
2069007466532	SHOPIFYB2C	Error	pending	lscotch@archerpoint.com	Lisa Scotch	4/7/2020 9:11 PM
2068653637668	SHOPIFYB2C	In Process	processing	sscanlan@archerpoint.com	Suzanne Scanlan	4/7/2020 4:28 PM
2068407582756	SHOPIFYB2C	In Process	processing	ctollison@archerpoint.com	Crystal Tollison	4/7/2020 1:42 PM
2068397359140	SHOPIFYB2C	In Process	processing	ctollison@archerpoint.com	Crystal Tollison	4/7/2020 1:36 PM
2068387004452	SHOPIFYB2C	In Process	processing	ctollison@archerpoint.com	Crystal Tollison	4/7/2020 1:29 PM
2068327563300	SHOPIFYB2C	In Process	processing	mensafreak72@hotmail.com	Lily Munster	4/7/2020 12:47 P
2068323729444	SHOPIFYB2C	In Process	processing	mensafreak72@hotmail.com	Lily Munster	4/7/2020 12:45 P
2068263469092	SHOPIFYB2C	In Process	processing	tmarshello@suiteengine.com	Marshello	4/7/2020 12:01 P
2065991139364	SHOPIFYB2C	Error	complete	bwinslow@archerpoint.com	Brad Winslow	4/5/2020 6:29 PM
2068097400868	SHOPIFYB2C	In Process	processing	wmstreet@me.com	Matt Street	4/7/2020 9:42 AM

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.

You also may notice that a few of the orders in our example above show in an error state. Someone may have placed an order, where CSM cannot find a Business Central Item, or a cross reference to shipping methods or payment methods. On the above example, the top two orders contained a product that CSM could not identify a Business Central item to match.

There could also be a condition where Shopify considers the order complete, but there is not a record of the shipment or invoice in the Business Central Database. Order 206599139364 is an example of this error. With normal operations, this should not be something that would happen however, when your first cutting over to use CSM, there may be some overlaps.

Order 2068653637668 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 Shopify was \$40.78. We can also see that there is an Outstanding Business Central Sales Order that totals \$40.78 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:

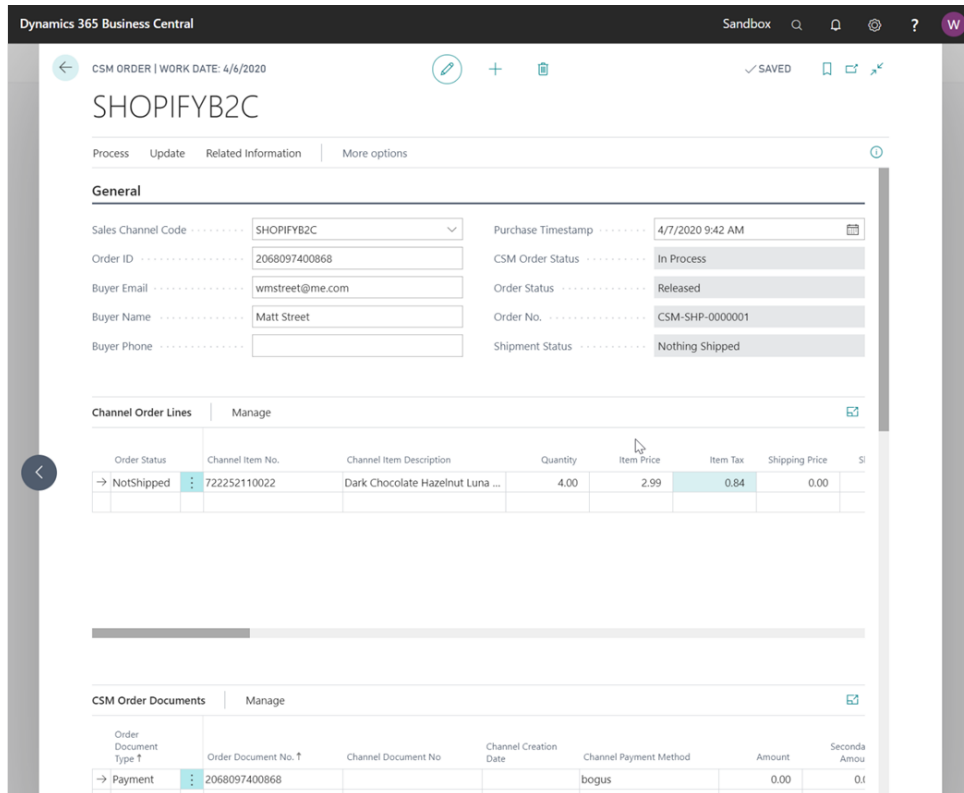
- Have an associated sales order in Business Central, and
- Have a CSM Order Status value that is not Complete.

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.



The screenshot shows the Dynamics 365 Business Central interface for a CSM Order Card. The card is titled "SHOPIFYB2C" and has a work date of 4/6/2020. The card is divided into several sections:

- General:** Contains fields for Sales Channel Code (SHOPIFYB2C), Order ID (2068097400868), Buyer Email (wmstreet@me.com), Buyer Name (Matt Street), Buyer Phone, Purchase Timestamp (4/7/2020 9:42 AM), CSM Order Status (In Process), Order Status (Released), Order No. (CSM-SHP-0000001), and Shipment Status (Nothing Shipped).
- Channel Order Lines:** A table with columns: Order Status, Channel Item No., Channel Item Description, Quantity, Item Price, Item Tax, Shipping Price, and SI. The first row shows "NotShipped" status, Channel Item No. 722252110022, Channel Item Description "Dark Chocolate Hazelnut Luna ...", Quantity 4.00, Item Price 2.99, Item Tax 0.84, Shipping Price 0.00, and SI.
- CSM Order Documents:** A table with columns: Order Document Type, Order Document No., Channel Document No., Channel Creation Date, Channel Payment Method, Amount, and Seconda Amou. The first row shows "Payment" type, Order Document No. 2068097400868, Channel Document No., Channel Creation Date, Channel Payment Method "bogus", Amount 0.00, and Seconda Amou 0.00.

General FastTab

The General FastTab of the Channel Order Card presents both values from Shopify and fields that CSM uses to keep track of status.

Values for Shopify

- Order ID
- Buyer Email
- Buyer Name
- Buyer Phone
- Purchase Time Stamp

When an order is placed in Shopify, a fraud analysis is performed and a risk level is assigned. If you have enabled the **Retrieve Order Risk** setting on the **CSM Sales Channel** page, CSM will retrieve this risk level along with an order's other information from Shopify and present it in the **Order Risk** field. If this setting is not enabled, the **Order Risk** field will present a value of *Not Assessed*.

CSM includes out-of-the-box [sales operation rules](#) that deny the automatic creation, release, or posting of a sales order with a high risk value; you can enable these sales operation rules to prevent various processing activities from being performed against those orders that are at especially high risk of fraud.

CSM Tracking Status

- **CSM Order Status** is a summary status value based on the integrity of the data, and relationship of the Channel Order to other Business Central Sales Documents (Sales Order, Posted Invoices, Posted Shipments).
- **Order Status** is a status indicating what CSM found in Business Central that are related order documents.
- **No Order** – No Business Central Sales Documents were found for this Channel Order.
- **Open** – A Business Central Sales Order Exists with a status of Open.
- **Released** – A Business Central Sales Order Exists with a status of Released.
- **Partial** – A Business Central Sales Order Exists and some of the items on the order have shipped.
- **Pending Approval** – A Business Central Sales Order Exists with a status of Pending Approval.
- **Pending Prepayment** – A Business Central Sales Order Exists with a status of Pending Prepayment.
- **Shipped** – Posted Shipments exist that have completed the order.
- **Order No.** If the Order Status is any value other than **No Order**, then this will be the Business Central Order Document Number of the documents that relate to this Channel Order.
- **Shipment Status** is a summary status value of what has been shipped so far from this order:
- **Nothing Shipped** – no posted shipments could be found for this Channel Order.
- **Partial Shipped** – Posted Shipments were found, but some of the items have not fully shipped.
- **Full Single Shipment** – All Items shipped on a Single Posted Shipment.
- **Full Multiple Shipments** – The order is fully shipped and at least 2 Posted Shipments were found.

Order Lines FastTab

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

Channel Order Lines

Manage

ORDER STATUS		CHANNEL ITEM NO.	CHANNEL ITEM DESCRIPTION	QUANTITY	ITEM PRICE	EXTENDED ITEM PRICE	ITEM TAX	SHIPPING PRICE
NotShipped	⋮	722252110022	LUNA BAR - Dark Chocolate Ha...	5.00	2.39	11.95	0.00	0.00
NotShipped		hdd004	Stone Salt and Pepper Shakers	1.00	65.00	65.00	0.00	0.00
NotShipped		100011112222	ArcherPoint Client Appreciation...	2.00	10.00	20.00	0.00	0.00

These are the order lines information as received from Shopify. Note that the Channel Item No. and Channel Item Description are how Shopify 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 Shopify 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 Shopify, 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 Shopify, 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 Shopify.

The Shopify channel order's retrieved delivery method is entered in the **Channel Shipping Method** field. CSM uses the Shopify 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 Shopify.

Shipping >

Invoicing

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

The invoicing information received from Shopify 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 Shopify will be added to the sales order as additional lines.

The Channel Order Total received from Shopify is also presented in this FastTab.

CSM supports Shopify's "Include tax in prices" feature, which allows you to include taxes in product prices and shipping rates. If you enable this feature in your Shopify environment, the **Tax Included In Price** field will be set to true on retrieved CSM orders (a corresponding **Tax Included in Price** field on each channel order line will also be set to true).

Channel Data FastTab

The Channel Data FastTab Section on the Channel contains additional information received from Shopify.

- Channel Status Value – The status of the Order as received from Shopify.
- Channel Customer Code – The Shopify 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 Shopify 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 Shopify store.
- Seller Order ID – The Order ID (Not Order Number) that Shopify assigns to the order.
- Channel Order Checkout ID – Presents the unique checkout ID that is assigned to the order at the time of checkout. Each checkout activity is identified with a unique checkout ID within Shopify.
- Channel Order Status URL – Presents the order status URL that is made available following checkout. The order status page allows customers to check on the order's status, see real-time shipment updates, re-order products, and opt in/opt out of notifications.
- Channel Order Source – Presents the channel order's source of origin A Shopify channel order's source will either be via the web or POS.
- Marketplace ID – This contains the Shopify Website ID that the order was placed on.
- Channel Order Processing Method – Presents the manner in which the channel order was processed.

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

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.

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 Shopify to update the order and its lines.
- Create Sales Order – This action will attempt to use the data retrieved from Shopify 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 Customer Behavior Setup

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

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

1. Go to the Sales Channel card
2. Look for “Sales Channel Customers”

If the Channel Order indicates that this is a Guest Checkout, CSM will look at the Sales Channel Customers to find an email (Channel User Code) Match. If found, it will attach the Order to the Customer and Contact specified on the found entry. If a match is not found, CSM will follow the Customer Behavior specified on the Sales Channel. If it is set to Auto Create, a new Business Central Customer will be Created using the number series specified on the Sales Channel.

For those orders where the Guest Checkout is false, CSM first looks at the External ID to see if there is a match. It then looks at the email for Guest Checkouts, and if found, essentially updates the record with the ID and uses that as the Customer for Sales Order Building Purposes.

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

If the Sales Channel Customer Behavior is set to Manual, and no match is found in the Sales Channel Customers table, then the Sales Order Creation process will fail. This may be useful in an B2B situation where new accounts who register on Shopify 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 Shopify sent for the order.

Make sure you enter the email address in the Channel User Code and also a starting password. (Note, Channel User Code must be unique for the Sales Channel).

Sending Customers from Business Central to Shopify


You can also send customer information to Shopify from Business Central. There are a number of requirements that must be fulfilled in order to send these records:

- Customer must have a Primary Contact No. assigned
- Customer must have a Name
- The Customer's Primary Contact must have an E-mail

Alternatively, contact information can be sent from Business Central to create a customer record in Shopify. Contacts also have some prerequisites:

- Contact must have a Name
- Contact must have an E-mail
- Contact must be assigned to a customer

In addition, Shopify uses a standardized format for addresses and expects to receive both a code and full name for each country and state/province that is retrieved. If the countries and states/provinces assigned to your customer and contacts in Business Central are not the same as the corresponding values in Shopify, it is necessary to map them in the cross-reference table for your Shopify channel:

1. Choose the  icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the CSM sales channel record for which you want to set up cross references.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **CSM Cross References** action.
4. In the **CSM Cross References** window, choose a blank line, then fill in the fields as follows:
 - **API Set Code:** enter or use the AssistButton to choose the API set code that is assigned to the Shopify channel.
 - **Sales Channel Code:** enter or use the AssistButton to choose the Shopify sales channel that will have cross references.
 - **Type:** you must enter these exact values:
 - For country cross references, enter COUNTRY
 - For state/province cross references, enter STATE_PROV
 - **Code:** enter the Shopify value for which you want to define a cross reference.
 - **Value:** enter the corresponding Business Central value that you want to map to the Shopify cross reference.
 - **Value 2:** enter the description/name of the code you entered in the Value field.

For example, in the screenshot below, we have mapped the Shopify country value USA to the Business Central country value US:

←

CSM Cross References

🔍

Search

+

New

📄

Edit List

🗑️


Delete

API Set Code ↑	Sales Channel Code ↑	Type ↑	Code ↑	Value	Value2
→ SHOPIFY	⋮ SHOPIFYB2C	COUNTRY	USA	US	United States

Once you have performed the necessary setup, you can send customers and/or contacts to Shopify. There are multiple ways in which you can perform this activity:

Send Customers from Customer/Contact Cards

You can 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.

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

CSM Order Documents										
Manage										
ORDER DOCUMENT TYPE	ORDER DOCUMENT NO.	CHANNEL DOCUMENT NO.	CHANNEL PAYMENT METHOD	AMOUNT	SECONDARY AMOUNT	EXTERNAL ID	LAST EXTERNAL UPDATE RESULT	SHIPMENT CARRIER	CO. SHI.	SHIPMENT TRACKING TITLE
Payment	1	1	ccsave	110.10	13.15	1				
Shipment	S-SHPT102215			0.00	0.00	100000057	Successful Shipment and Tracki...	ups		UPS Tracking Number
Invoice	PS-INV103215		ccsave	110.10	0.00	103000032	Successful Shipment Sent to Ch...			TestTrackingNo-111111

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

In some scenarios, the **External Requires Update** field does not get unchecked for a shipment line, even if the order has been properly shipped. CSM will continuously attempt to send these shipment lines to Shopify whenever the automation is executed. While this does not cause any direct errors, it can increase the overall time it takes for the automation to complete. To mitigate against these scenarios, CSM includes a [sales operation rule](#) that will instruct CSM to skip sending any shipment lines with a zero quantity to the connected channel as part of the automation. This sales operation rule is automatically created along with a new channel.

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.

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

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

Navigate into a BC Sales Order related to a CSM Sales Channel Order, by clicking More Options >Navigate > Sales Order > Show Document.

Business Central Sales Order

You will now see the BC Sales Order that CSM created during the Automation run from the Shopify Order at the Shopify Store.

Let's find that order in our Shopify Admin portal.

You can see at the Shopify Admin order, that the status is "Payment Authorized," and "Unfulfilled."

Sending Shipping and Payment Capture Information to Shopify

1. Review the Sales Order Information that CSM built
2. Enter a Package Tracking Number in the Shipping Fast Tab.
3. Then Post the Sales Order (Ship and Invoice). Based on Settings on the Sales Channel, CSM will Immediately communicate the shipment and invoice information to Shopify.
4. Close the Channel Order and return to the role center.
5. Run Order Automation Now once again.
6. This will refresh the Shopify Status of the Order that we just shipped. Press CSM Channel Orders in the Navigation bar to see the results.

Dynamics 365 Business Central

Sandbox

CRONUS USA, Inc. | Posted Documents

CSM Channel Orders: All | Search | New | Delete | Show Documents | Update Status | Card | Open in Excel | More options

Thank you for trying out the TEST - CSM Core app. Your trial period expires in 27 days 9 hours 42 minutes. Purchase Subscription

Order ID	Sales Channel Code	CSM Order Status	Channel Status	Buyer Email	Buyer Name	Purchase Timestamp
2068097400868	SHOPIFYB2C	Complete	complete	wmstreet@me.com	Matt Street	4/7/2020 9:42 AM
2069535162404	SHOPIFYB2C	Error	processing	cstreitenberger@archerpoint.c...	cindy s	4/8/2020 9:00 AM
2069007466532	SHOPIFYB2C	Error	pending	lscotch@archerpoint.com	Lisa Scotch	4/7/2020 9:11 PM
2068653637668	SHOPIFYB2C	In Process	processing	sscanlan@archerpoint.com	Suzanne Scanlan	4/7/2020 4:28 PM
2068407582756	SHOPIFYB2C	In Process	processing	ctollison@archerpoint.com	Crystal Tollison	4/7/2020 1:42 PM
2068397359140	SHOPIFYB2C	In Process	processing	ctollison@archerpoint.com	Crystal Tollison	4/7/2020 1:36 PM
2068387004452	SHOPIFYB2C	In Process	processing	ctollison@archerpoint.com	Crystal Tollison	4/7/2020 1:29 PM
2068327563300	SHOPIFYB2C	In Process	processing	mensafreak72@hotmail.com	Lily Munster	4/7/2020 12:47 PM
2068323729444	SHOPIFYB2C	In Process	processing	mensafreak72@hotmail.com	Lily Munster	4/7/2020 12:45 PM
2068263469092	SHOPIFYB2C	In Process	processing	tmarshello@suiteengine.com	Marshello	4/7/2020 12:01 PM
2065991139364	SHOPIFYB2C	Error	complete	bwinslow@archerpoint.com	Brad Winslow	4/5/2020 6:29 PM

Details | Attachments (0)

Sales Channel Order Statistics

Order ID	2068097400868
Purchase Timestamp	4/7/2020 9:42 AM
Last Source Update	4/8/2020 12:35 PM
CSM Order Status	Complete
Channel Order Total	18.04
Outstanding SO Amount	0.00
Total Amt. Invoiced	18.04
Posted Shipments	1
Customer	CSM-0000001

Note that the **status of the posted CSM Sales Channel Order is now complete**. Also, the FactBox on the right shows that there is no longer an “Outstanding SO Amount,” however, we now have a posted invoice and shipment. The FactBox fields have hyperlinks which will permit you to Navigate/drill down to the related document.

- On the Shopify side, we now see these changes that CSM triggered and sent to Shopify as a result of the Posted Invoice and Posted Shipment in Business Central.
- See at the Shopify Order, that the Tracking information we entered is now showing in Shopify.
- Since you shipped the entire order, Shopify shows the order as Fulfilled.
- Also, based on the posted invoice in Business Central, Shopify received a funds capture message, which caused Shopify to capture a credit card authorization for the posted invoice amount.
- Since the order is now fully paid, Shopify set the payment status to paid as well.
- Because the order on the Shopify side is now fully paid for and fulfilled, it archived the order, and now sends CSM a status of “Complete.”
- Once CSM obtain the confirmation that Shopify Considers the order complete, and it finds the related posted invoice and posted shipment information in Business Central, then CSM changes the status of the Sales Channel Order to “Complete.”

Shopify permits a single credit card payment capture per transaction; multiple payments are not permitted. When you are [setting up CSM payment methods](#), you can enforce this requirement by indicating that the Shopify payments method allows a single capture. CSM will capture and send the payment to Shopify when the related Business Central sales order is fully shipped and invoiced. If the sales order is partially shipped or invoiced, no payment capture will be recorded.

It is also possible to manually instruct CSM to capture the payment and send it to Shopify from the **CSM Order** window by choosing the **Process** ribbon, then choosing the **Capture Payment** action. This is useful in scenarios where a sales order is partially shipped and invoiced, but then deleted because it was not possible or desirable to backorder the remaining items. In such a scenario, CSM would not have captured the payment, as it was waiting for the order to be fully processed, making it necessary to manually initiate the payment capture.

The above requirement does not extend to other payment methods supported by Shopify. For example, multiple gift card payments can be applied to the same transaction.

Retrieving Refunds from Shopify

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

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

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

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

Processing Shopify POS order returns

On the Shopify POS platform, scan the customer’s receipt, add the items to return, select the payment method where it will be returned and clicking ‘done’.

- Go to BC and run the Automation.
- The system receives the notification of the return processed on Shopify POS and Creates a ‘CreditMemo’ line on the ‘CSM Order’ > ‘CSM Order Document’ FastTab, posts it and applies it towards the invoice of the involved CSM Order. **(if the auto document creation is not enabled on the automation the user can select the sales return line in the CSM Order Document and press the create credit memo).**
- Creates a ‘SalesReturn’ line on the ‘CSM Order’ > ‘CSM Order Document’ FastTab
- Creates ‘Refund’ lines on the ‘CSM Order’ > ‘CSM Order Document’ FastTab for each of the methods used on the order.
- You can easily review the Credit Memo generated either through the FactBox from the CSM Channel order list, from within the CSM Order, at the Customer Ledger Entries page and Posted Sales Credit Memo list.

Important fields to consider for the returns:

- 'Reference Document No.', referring to the 'Order Document No.' of the 'SalesReturn' that the 'Refund' lines were created for.
- 'Parent Document No.', for which the 'Refund' lines are associated with.
- 'Unposted Document No.', which associated the 'CreditMemo' and the 'SalesReturn' lines.

Investigating the documents of your 'CSM Order Documents' FastTab

- Click on 'Manage' on the FastTab ribbon button
- Click on 'Document Lines'

Alternatively, click the row of the document you want to investigate, then hover over the FactBox and click on the shortcut link for the document you want to see.

Sending Return Orders from Business Central to Shopify

In addition to being able to [retrieve refunds from Shopify and then create a credit memo in Business Central](#), it is possible to initiate a return order from Business Central and then send this to the corresponding order on your external Shopify platform.

CSM Setup

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

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

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

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

On the Sales Channel page, there is a field **Enable Refund Processing** which should be set to true. Performing this action will make the other refund fields visible. The values in the fields should remain the same as they were before upgrading.

Creating and Processing Return Orders

You can generate a sales return order from any CSM order that has been fully or partially shipped. CSM will not allow you to create a return for any CSM orders that have not been shipped. CSM will also not allow you to create a return

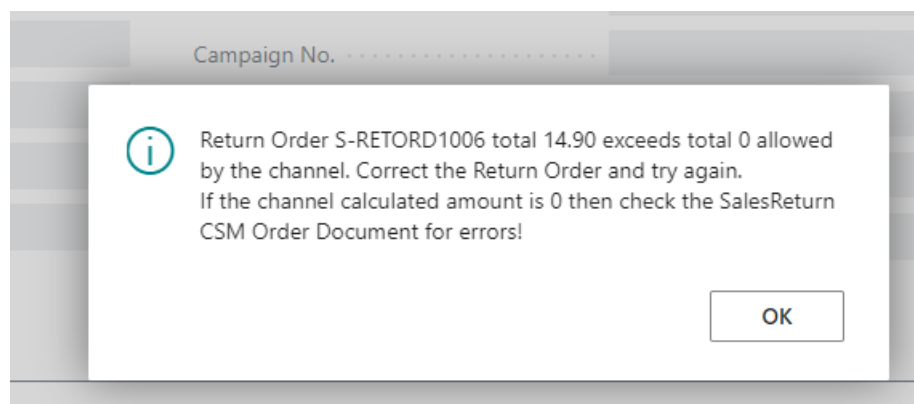
order if the **External Requires Update** field for any shipment or credit memo order documents on the related CSM order is set to *True*. This will prevent the creation of a return for an order that has not been properly shipped or credited.

1. Open the **CSM Channel Orders** list, then select an order for which the return will be issued.
2. Choose the **Create Sales Return Order** action in the ribbon on the **CSM Order** page.
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.
4. On the **Sale Return Order** page, in the **Channel Sales Manager** FastTab enter a **CSM Return/Refund Reason** (some examples are, damaged, wrong size, wrong color, wrong style, etc.).
5. Make any necessary adjustments on the return order lines.

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

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

Attempting to release the return order will send an API call to Shopify with instructions to calculate and retrieve a refund amount for the return. CSM will also perform a number of validations to ensure that the sales return order is in sync with the Shopify order (the order hasn't already been returned, order quantities are correct, etc.). If any discrepancies are detected, the release process will error and a message will instruct the user as to where the inconsistency lies:



If the release process is successful, CSM will capture the calculated refund information and use it later when the return order is posted to create the refund on Shopify. In addition, the related CSM order's refund status will be updated to Pending, and its sales return status will be updated to Released.

Regardless of whether the release process was successful, a new sales return order document line will be entered on the **CSM Order Documents** FastTab of the related CSM order. This line contains information about the return order. In addition, if the release process produced an error, the text of the error message can be reviewed in the **Last External Update Result** field. You can view additional information about this line by choosing the FastTab's **Manage** ribbon, then choosing the **Document Transactions** action.

Note: As an alternative to releasing the sales return, you can choose the **Actions** ribbon, then select the **Functions** menu and choose the **Suggest CSM Refund** action. CSM will make the same API call to Shopify to obtain a refund amount and identify any discrepancies, but will not attempt to release the sales return order.

8. If the return order was successfully released, it can now be posted. Choose the **Post** action in the ribbon.

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

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

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

- New credit memo and return receipt order document lines will be entered on the **CSM Order Documents** FastTab. You can view additional information about these lines by choosing the FastTab's **Manage** ribbon, then choosing the **Document Transactions** action.
- The CSM order's refund status will be updated to Complete.
- The CSM order's sales return status will be updated to Posted.
- In the **Sales Channel Order Statistics** FactBox, the outstanding return order amount, posted shipments, and total amount credited values will be updated accordingly.

Sending and Retrieving Refund Information from Shopify

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

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

After CSM communicates this information to Shopify, Shopify will process/issue the refund. Depending on the seller's balance on Shopify and other factors, this process may not be instantaneous.

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

- A new refund entry is entered in the customer's ledger. This entry is applied to the related credit memo entry.

- A new refund order document line is entered on the **CSM Order Documents** FastTab. You can view additional information about this line by choosing the FastTab's **Manage** ribbon, then choosing the **Document Transactions** action.
- The **Refund Reference** field on the related CSM order is populated with a reference number that is obtained from Shopify.

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:

1. 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.

2. 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>34</p> <p>See more</p>	<p>Outstanding Orders to Channel</p> <p>7</p> <p>See more</p>
<p>Outstanding Listings to Channel</p> <p>40</p> <p>See more</p>	<p>Delayed Automation</p> <p>11</p> <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 3 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.

To Learn more about CSM and its many features, please review our documentation at:

<https://suiteengine.com/help/>

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.

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	NEWTOSCM

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	HEADLINEACTIONOPENCMSMSETUP

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 Shopify, if the "Password" field is blank in your API Credentials, then when the Test Communication action is run on the CSM Sales Channel page it will display a message stating that the *API Key or Access Token is invalid (unrecognized login or wrong password)*. Once the password is entered in 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.