CSM FOR MAGENTO

This app supports both Magento 1.x and 2.x platforms

An App by Suite Engine

Microsoft Dynamics 365 Business Central

Order Management Setup

Version: 2.0

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ORDER MANAGEMENT SETUP

CSM for Magento 2.0 (D365 Business Central Version: Platform 19.0.32956.34593 + Application 19.2.32968.34821)

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

This product supports both Magento 1.x and 2.x platforms.

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

Contents

Introduction

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

A Note on Magento

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

CSM for Magento can be deployed in both Magento 1 and Magento 2 environments, and includes separate API sets for both version. When you are in the process of setting up a new sales channel, CSM will prompt you to specify the Magento version you want to use. Based on this selection, CSM will assign the relevant API set to the new sales channel.
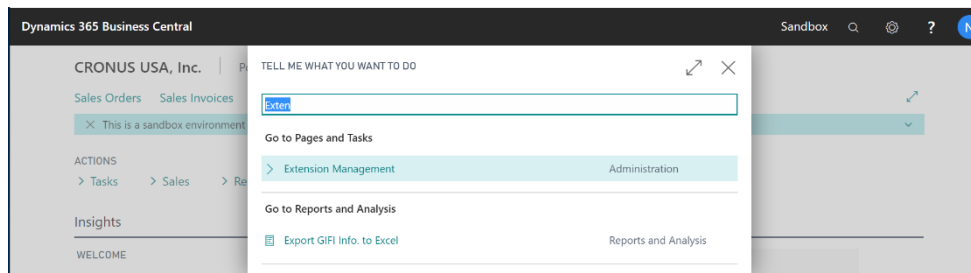
> **Note:** *Magento officially stopped supporting Magento 1 on June 30, 2020. While CSM for Magento can be deployed in a Magento 1 environment, active development of new CSM features and functionality for Magento 1 does not take place. In addition, Suite Engine at some point will cease Magento 1 validation activities, meaning that new product changes will have the potential to break or limit functionality in Magento 1. It is highly recommended that you consider upgrading your Magento 1 environment to Magento 2.*

For more information on the differences between Magento 1 and Magento 2, please see here.

CSM Initial Setup

Manage the Magento for CSM Extension

CSM requires a setting to allow it to initiate communication to Magento. This setting is in the Business Central Extension Manager. Press the gear in the upper right to search for a page to navigate to.

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".
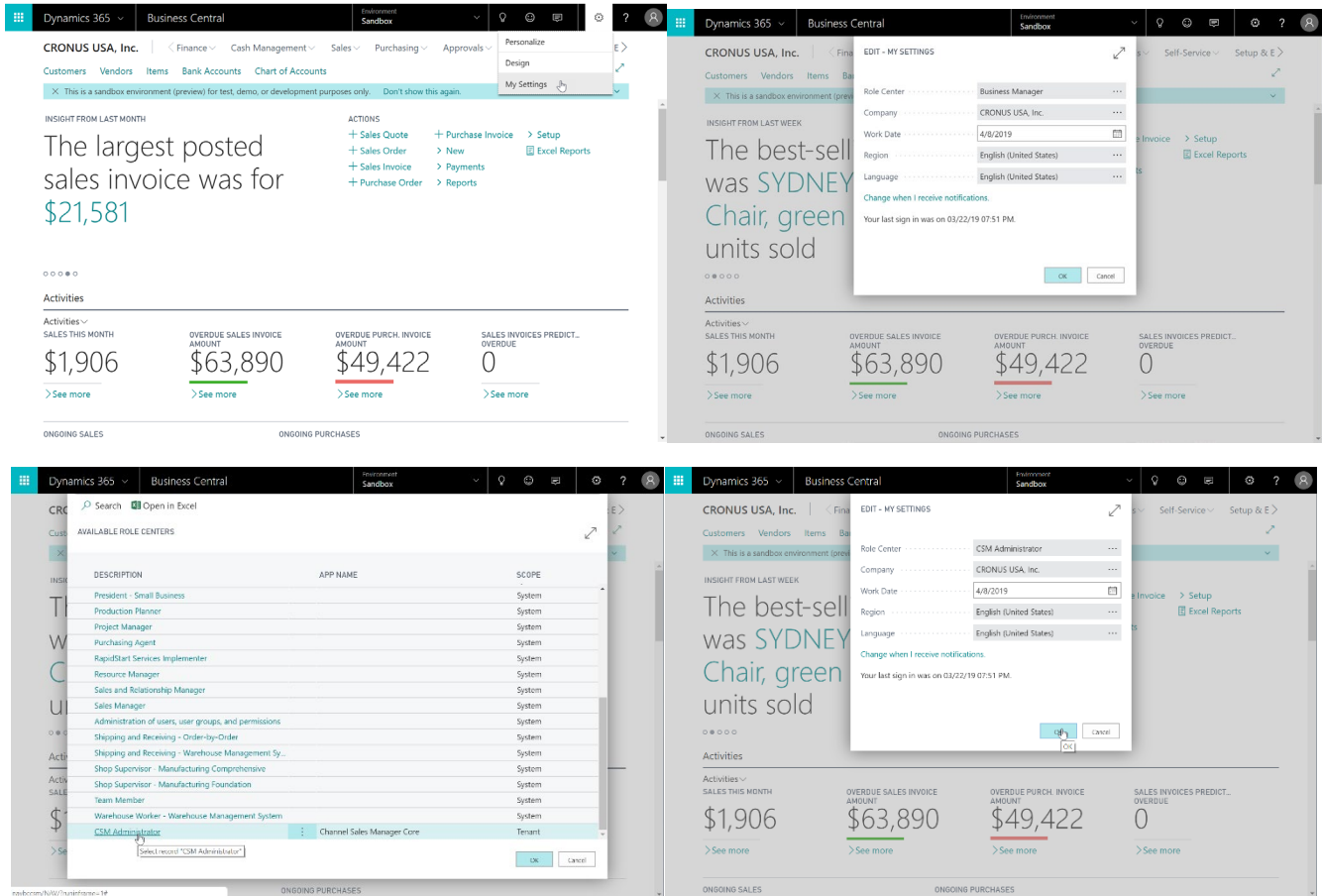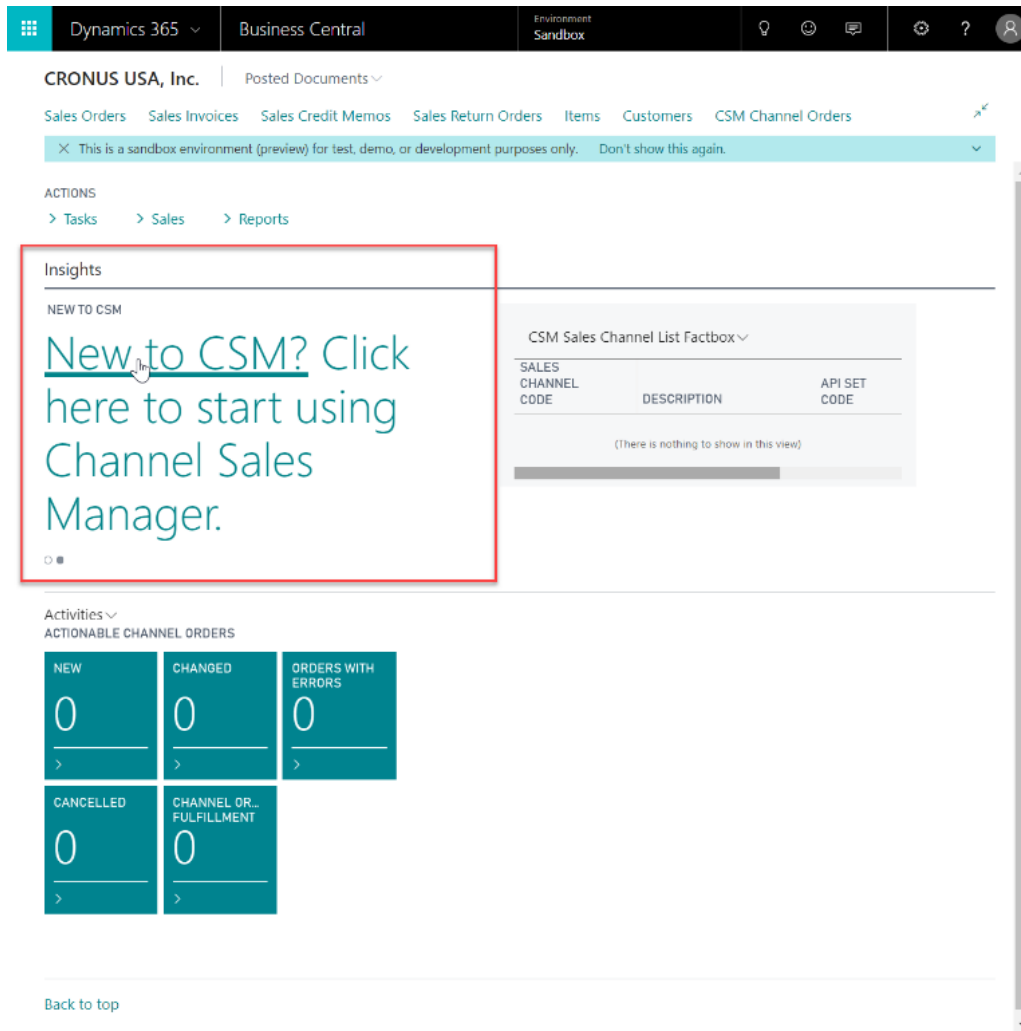
CSM Setup

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

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

- Choose the ⌕ icon, enter **CSM Setup**, and then choose the related link.

- 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.

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

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

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

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

If CSM for Magento is being installed in a Business Central environment in which other CSM solutions have been deployed, the trial subscription will be created for the customer ID subscription account that is already assigned in Business Central. Although rare, there may be situations where a CSM subscription account exists but no account details are present in Business Central; in such a scenario, it is necessary to link the Business Central environment to the appropriate subscription account by choosing the Actions ribbon, then choosing the Link to Existing Customer action. This will open a separate page that prompts the user to supply a:

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

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

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

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

The CSM for Magento Setup Wizard

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

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

Select Actions -> Magento Quick Setup.
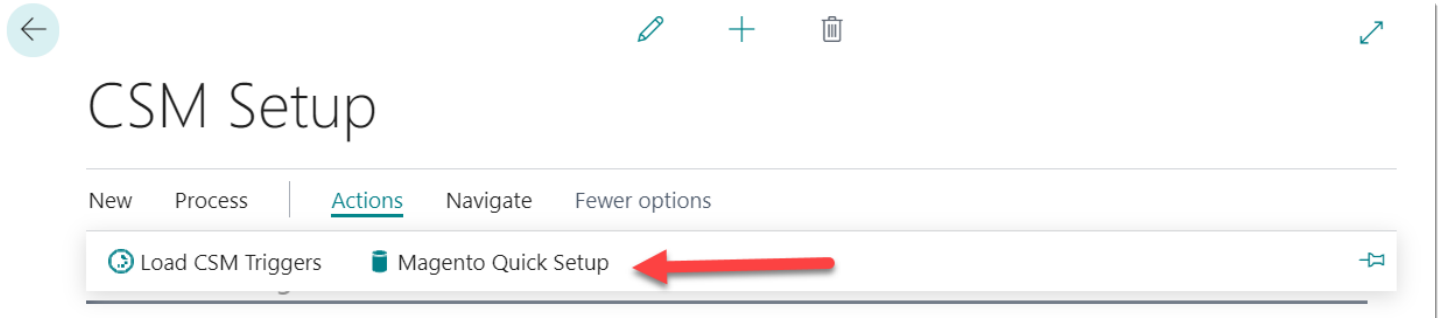
This will start the Magento Setup Wizard.
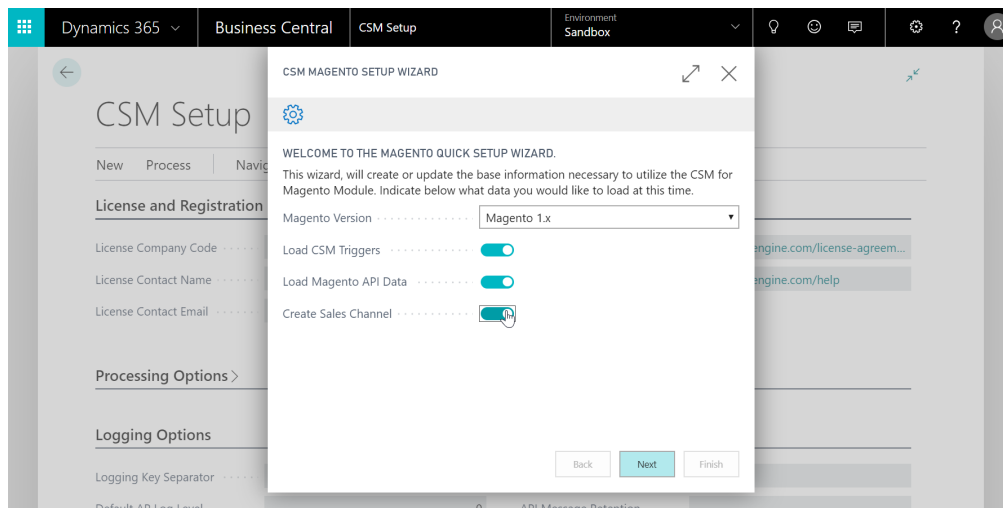
here for more information on these platform versions). After you have specified the web service type, it is recommended you enable all presented setup options for loading CSM triggers and Magento API data, as well as creating a new sales channel in Business Central. When you are done making these selections, choose the **Next** button.

On the second page of the wizard, you can specify information about the API set you are using to facilitate communications between Business Central and your external channel platform.

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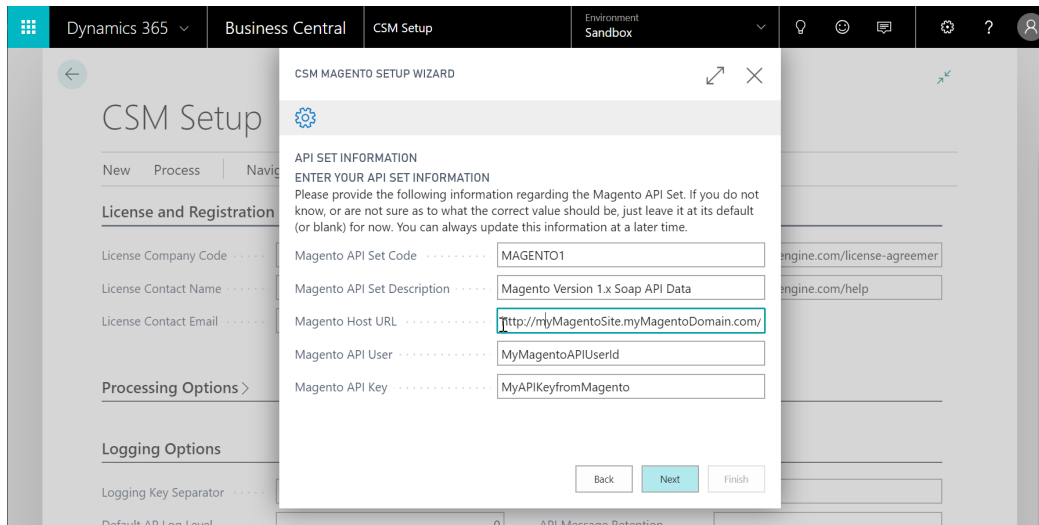
Field	Description	Platform Type	Example Value
Magento API Set Code	This is unique code that identifies the API set. It can be any value you wish, but we recommend naming it something meaningful that describes the external source the API set communicates with.	Both	MAGENTO1
Magento API Set Description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

On the third page of the wizard, you will specify how you want to identify your Magento channel.
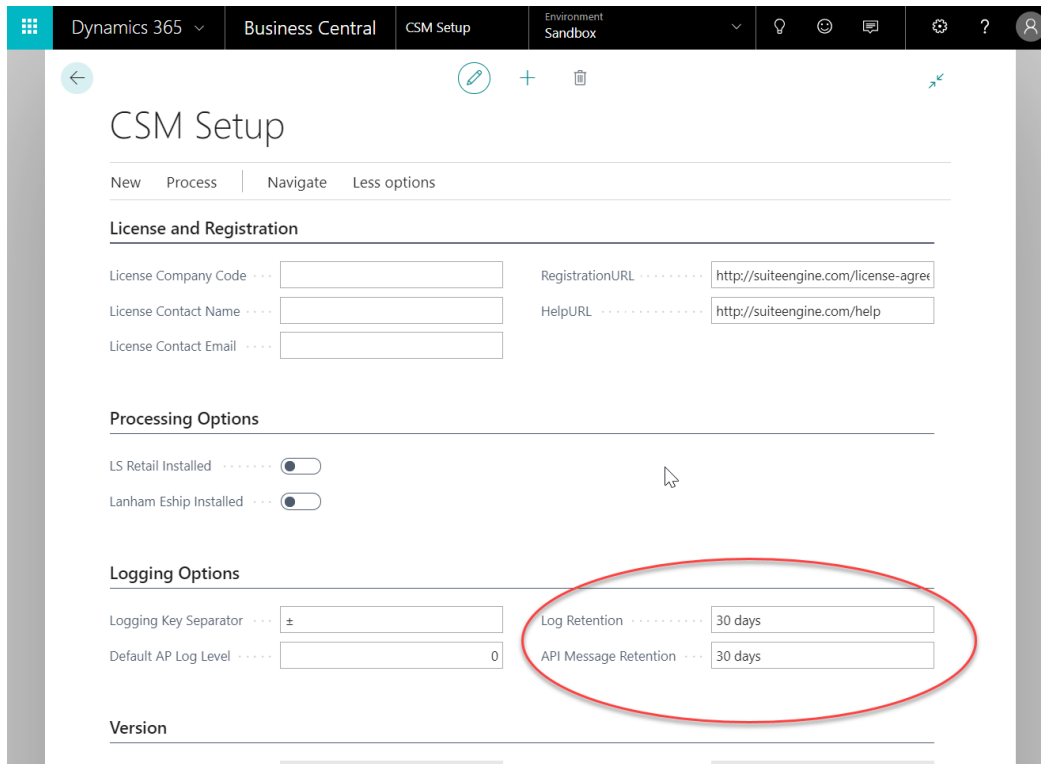
Field	Description	Example Value
Code	This is unique code that identifies the Sales Channel. It can be any value you wish, but we recommend naming it something meaningful that describes the Sales Channel.	MAGENTO_B2C
Description	This is a text description of the Sales Channel.	Magento Retail Store (B2C)

The fourth page of the wizard is a confirmation page. Choose the **Next** button to instruct CSM to load and configure Amazon channel. You can choose the **Back** button if you need to make changes to any entered settings.
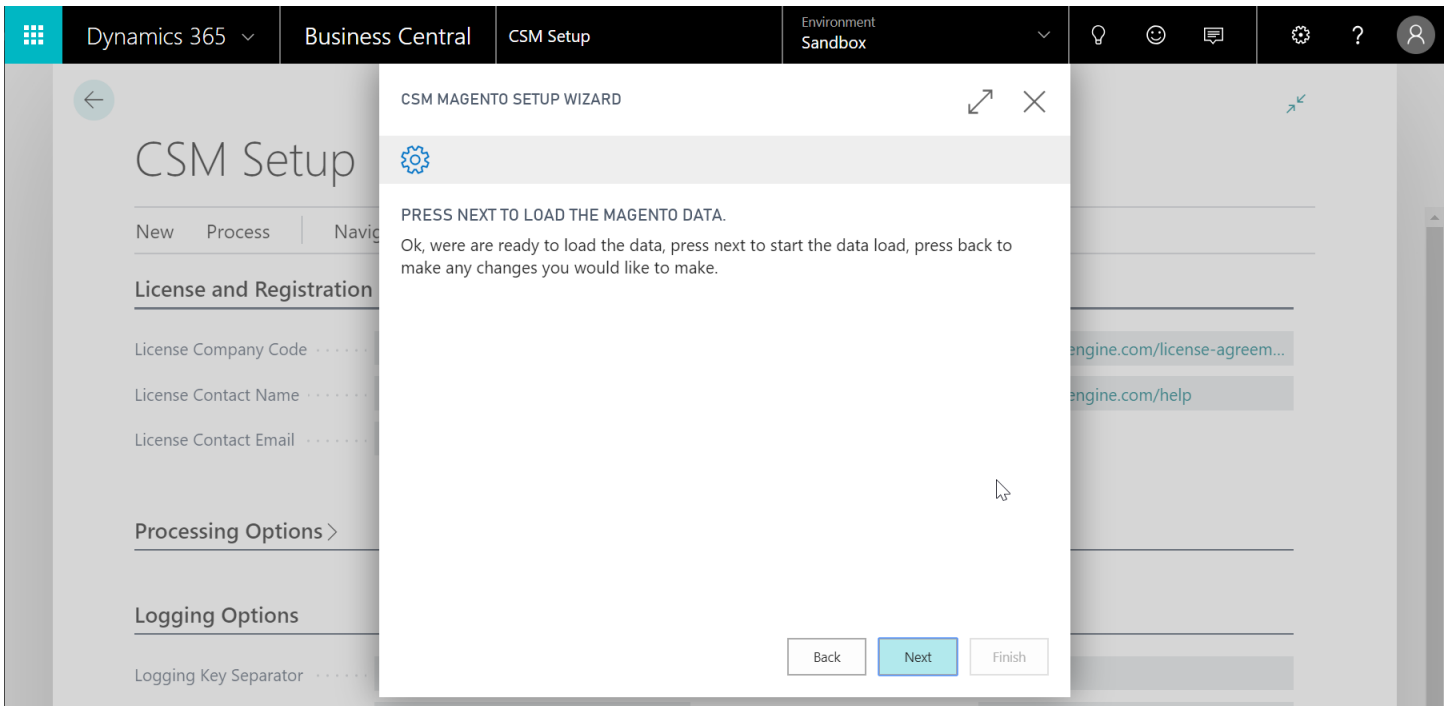
Press "Finish" on the Final Page and the Wizard will close.

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

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

Set Up Channel Credentials

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 define credentials for one sales channel, then define that channel as the "credentialing sales channel" for other sales channels. When an API call is made against a sales channel, CSM will use the credentials that exist for the channel's defined credentialing sales channel to validate that API process. In this way, CSM users do not have to maintain access credentials for every sales channel that is set up in Business Central.

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

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

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

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

You can view the credentials that have been defined for a sales channel by choosing the **Actions** tab in the ribbon, selecting the **API and Automation** group, and then choosing the **API Credentials** option. If you entered credentials when you were creating the sales channel via the setup wizard, the necessary API credential records will have been automatically created. If this information was not entered in the setup wizard (and you do not wish to use existing credentials), these records must be manually set up on this page.

Verify Channel Connectivity and Retrieve Your First Channel Orders

At this point in time, if your host name and credentials are valid, you should be able to conduct a small communication test. After returning to the role center, select the new Sales Channel the setup wizard created.
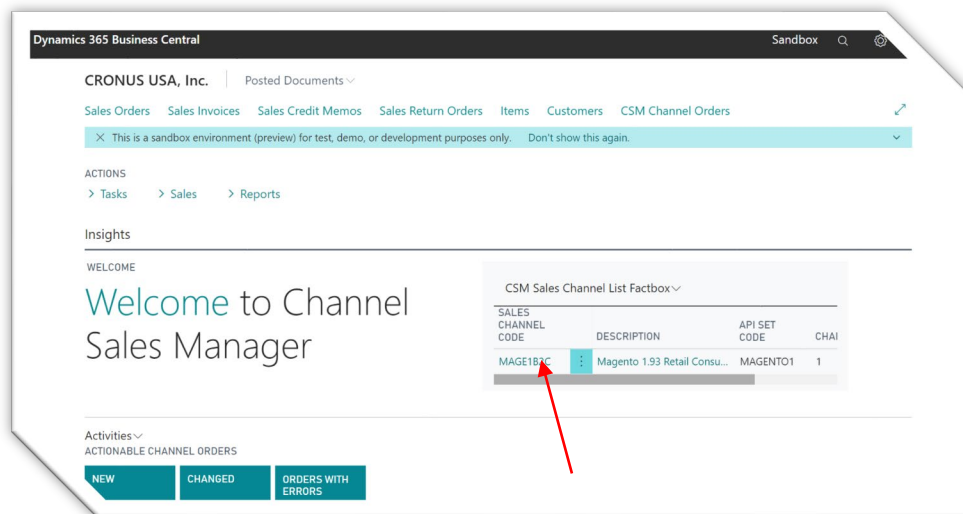
Next, select API's, then Test Channel Communication.
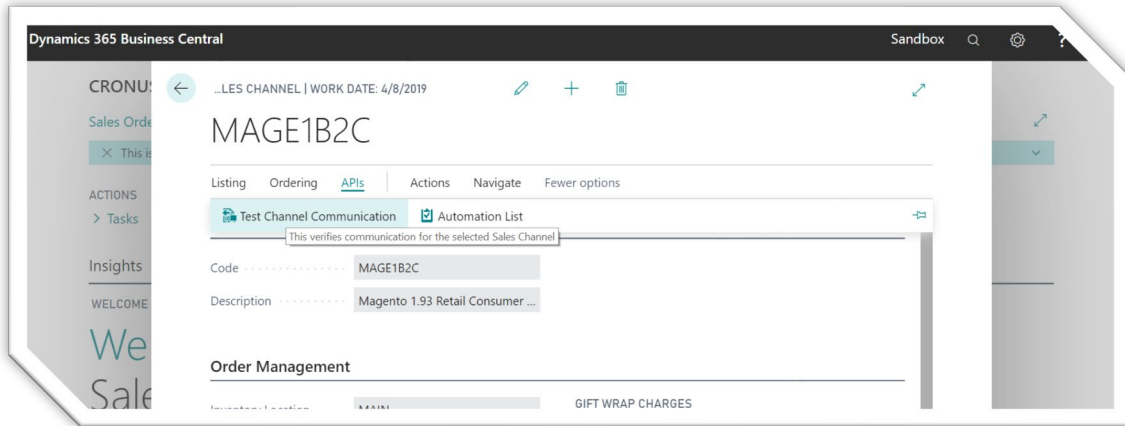
If successful, a dialog showing the Magento Edition and Version should display.
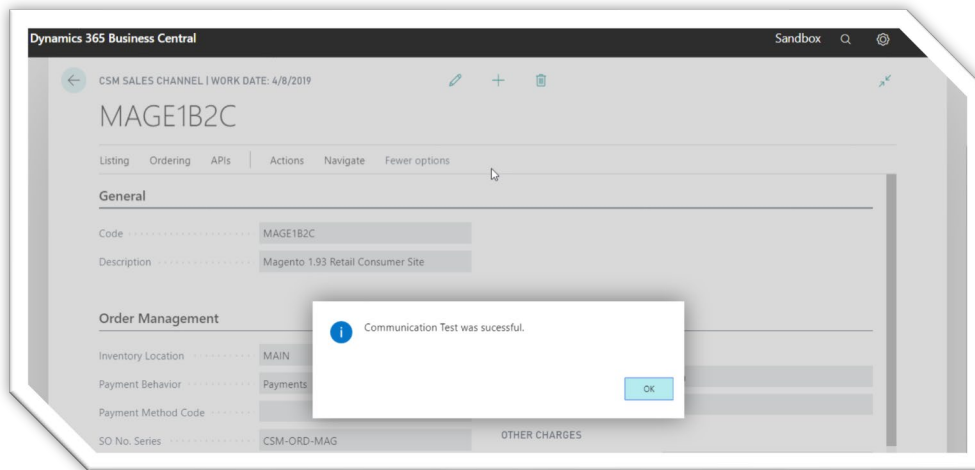
Next, you will want to set the time and date starting point for order retrieval. The date you enter, will cause CSM to ask Magento for all order information that has been added, or has changed since the time and date you enter. After that point, CSM will automatically update this time and date to ensure that there are no gaps in the communication. To Set the starting Order Retrieval Start time and date:
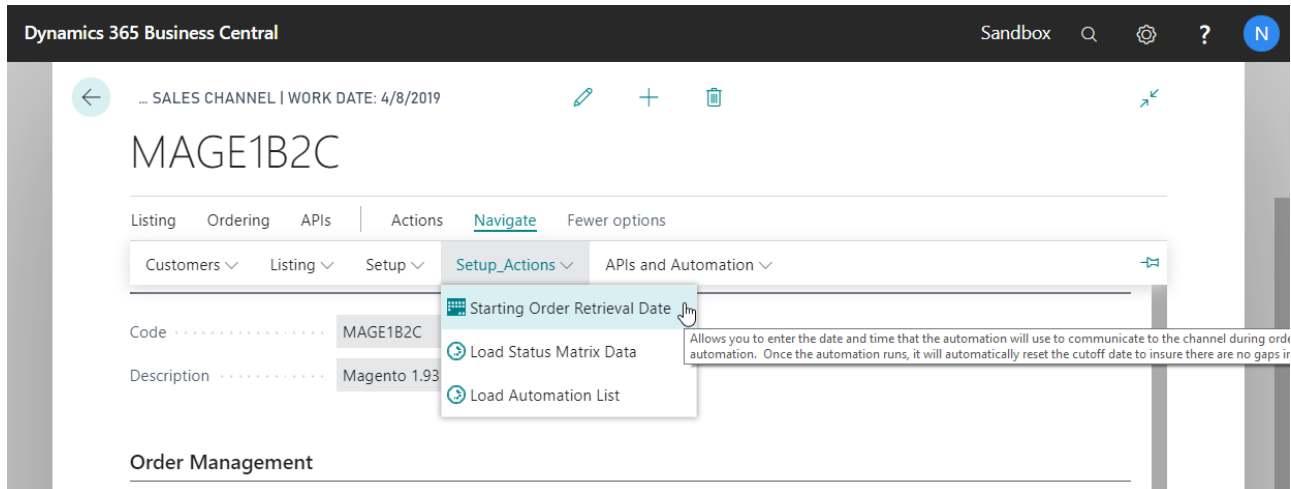
The Starting Date and Time dialog will then appear.
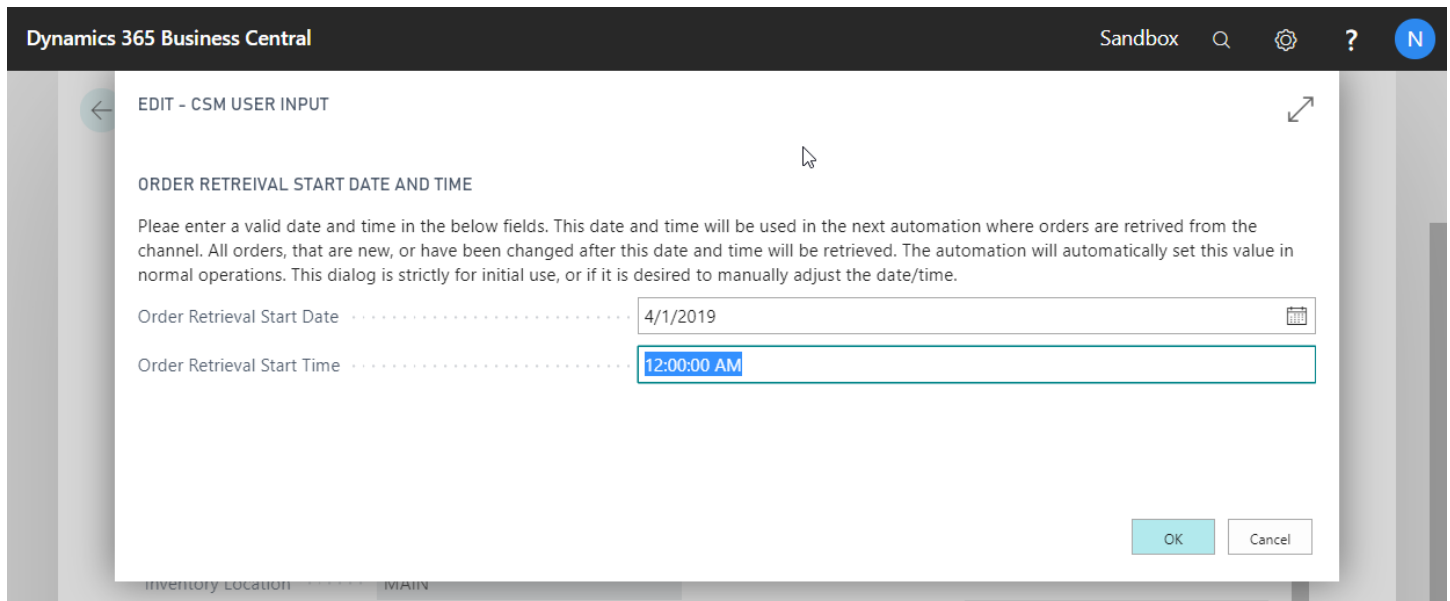
Enter your desired starting date and time for order retrieval, then you are all set to download orders.

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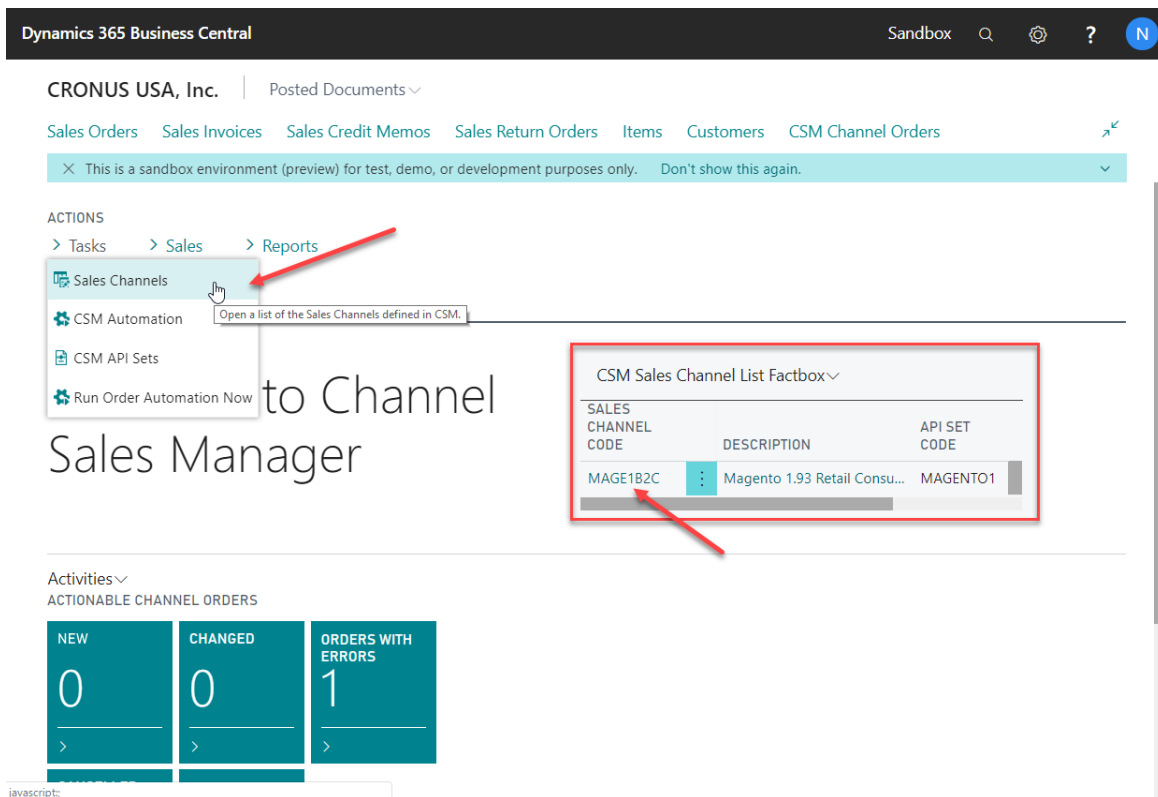
This section will go thru the settings that will customize your CSM experience and cross-reference your data in Business Central to like data in Magento, such as shipping methods, payment types, and customer price groups.

CSM Sales Channel

Sales Channels are the heart of CSM; most user interaction centers around a Sales Channel. Think of a Sales Channel as an eCommerce or marketplace store. For example, if you have 2 Magento Stores defined, one B2C, the other B2B, they would be setup as two Sales Channels in CSM. If you use the Amazon Marketplace, you may sell on Amazon using the FBA (Fulfilled by Amazon) model, and/or the FBM (Fulfilled by Merchant) model. Each of those are different Sales Channels in CSM.

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

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

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

Here is a walk-through of the data on the Sales Channel card that is used by Order Management.
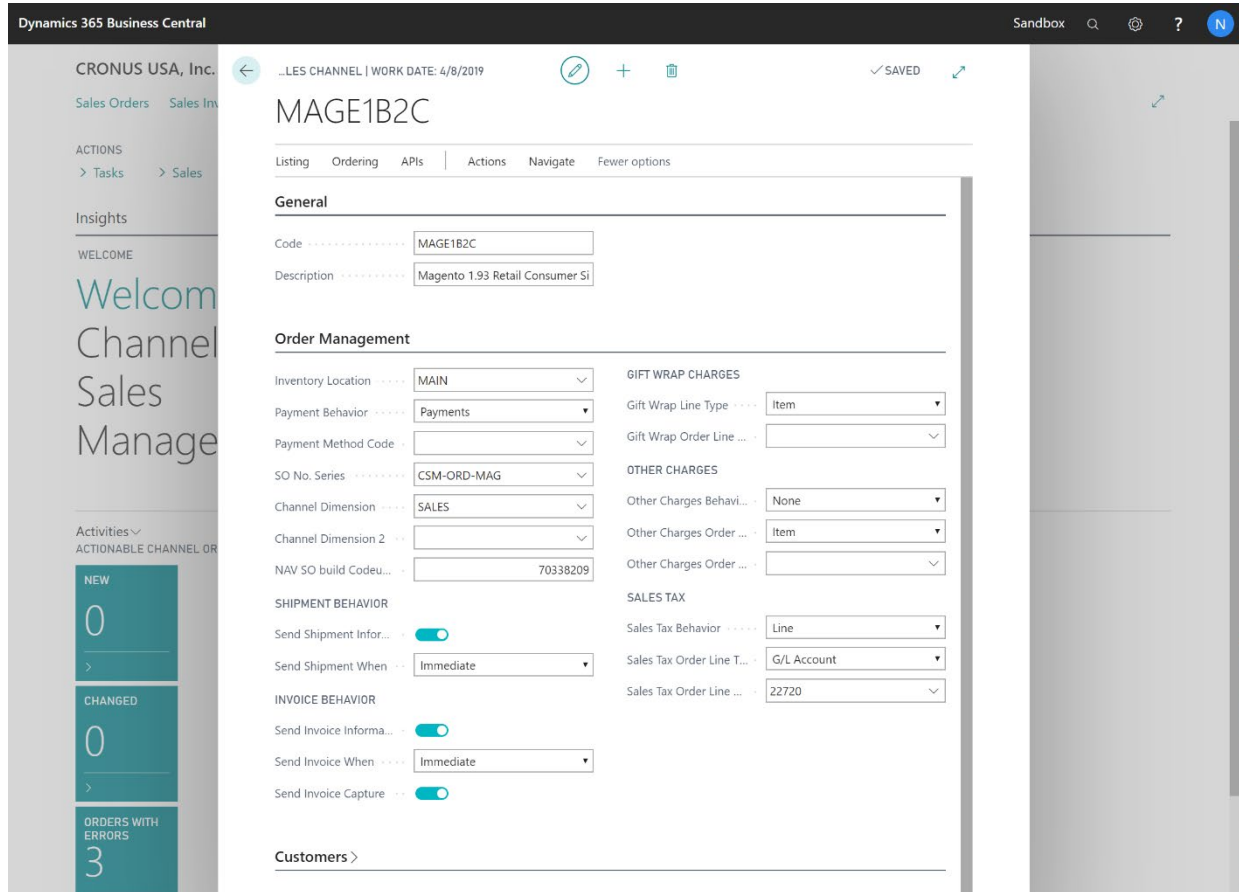
General FastTab		
Field	Description	Example Value
Code	This is unique code that identifies the Sales Channel. It can be any value you wish, but we recommend naming it something meaningful that describes the Sales Channel.	MAGENTO_B2C
Description	This is a text description of the Sales Channel.	Magento Retail Store (B2C)
Order Management FastTab		
Field	Description	Example Value
Inventory Location	The Business Central (BC) inventory location that supplies this store. BC Sales Orders Created for this Sales Channel will specify this inventory location. Listing Management will also use this value in its inventory availability calculation.	BLUE

Payment Behavior	Indicates how this sales channel processes payments. **For Magento 1.x Sales Channels, this should be set to Payments**. Amazon Sales Channel will use Channel since all Amazon Orders pay the merchant the same way.	Payments
Payment Method Code	The Code of the BC Payment Method which should be used. For Payment Behavior: Payments, this will be the default value. For Payment Behavior: Channel, this will be the Payment method used on all orders.	AUTHNET
SO No. Series	The No. Series that should be used for Sales Order Number when building BC Sales Orders for this Sales Channel.	CSM-ORD-MAG
Channel Dimension	If populated, this BC Financial Dimension will be set on all BC Sales Orders created from this Sales Channel. Primary Dimension 1.	SALES
Channel Dimension 2	If populated, this BC Financial Dimension will be set on all BC Sales Orders created from this Sales Channel. Primary Dimension 2.	
SO No. Series	The Object number of the Codeunit that should create BC Sales Orders. By default, this should be 70338209 which is the supplied CSM functionality to build Sales Orders. You can however customize the functionality by creating a new Codeunit and specifying its number here. It is recommended that you keep the default value.	70338209
Send Shipment Information	Indicates whether CSM should send shipment information to the Channel.	Yes
Send Shipment When	If CSM is sending Shipment information, this field tells CSM when to send it. Immediate: When the Shipment is posted; Scheduled: Shipment information will be queued and sent by the CSM automation (this assumes that the automation is setup properly to send shipment information); Manual: Shipment information is sent by a user who presses the Send Shipment Information action button on the Channel Order card.	Immediate
Send Invoice Information	Indicates whether CSM should send invoice information to the Channel.	Yes
Send Invoice When	If CSM is sending Invoice information, this field tells CSM when to send it. Immediate: When the invoice is posted; Scheduled: Invoice information will be queued and sent by the CSM automation (this assumes that the automation is setup properly to send invoice information); Manual: Invoice information is sent by a user who presses the Send Invoice Information action button on the Channel Order card.	Immediate
Send Invoice Capture	If CSM is sending Invoice information, this field tells CSM whether a capture transaction should be sent immediately following the Invoice. For Magento, this is dependent by payment method. If your payment method Behavior is set to payments (which it should be for Magento 1.x implementations), CSM uses the Send Invoice Capture value set for each Payment Method (See setting up Channel Payment Methods later in this document).	True
Gift Wrap Behavior	This setting tells CSM how it should handle Gift Wrap Charges on orders received from the Channel. If you select None, Gift Wrap Charges will be ignored, use this setting if your Magento 1.x implementation does not include Gift wrap services. If you select Line, then when CSM creates the BC Sales Order for a Magento Order, a Sales Order Line will be added to account for Gift Wrap charge.	

Gift Wrap Line Type	If you choose Line as the Gift Wrap Behavior, this field specifies the Sales Order Line Type which should be used for the Gift Wrap Charge (Revenue from the Customer). The values can be G/L Account, Item, Resource, or Charge (Item).	
Gift Wrap Order Line No.	If you choose Line as the Gift Wrap Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Gift Wrap Line Type chosen).	
Other Charges Behavior	This setting tells CSM how it should handle Other Charges on orders received from the Channel. If you select None, Other Charges will be ignored. If you select Line, then when CSM creates the BC Sales Order for a Magento Order, a Sales Order Line will be added to account for Other Charges.	Line
Other Charges Line Type	If you choose Line as the Other Charges Behavior, this field specifies the Sales Order Line Type which should be used for the Other Charges (Revenue from the Customer). The values can be G/L Account, Item, Resource, or Charge (Item).	G/L Account
Other Charges Order Line No.	If you choose Line as the Other Charges Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Other Charges Line Type chosen).	45120
Sales Tax Behavior	This setting tells CSM how it should handle Sales Tax on orders received from the Channel. If you select None, CSM will build Sales Orders with the Tax Liable flag set to True. In this case, BC will calculate the Sales Tax regardless of what Magento calculated and collected. If you select Line, then when CSM creates the BC Sales Order for a Magento Order, the Tax Liable Flag will be set to FALSE (which keeps BC from calculating sales tax), and Sales Order Lines (one for each item, plus lines for tax collected on order level charges (shipping, gift wrap, other charges)) will be added to account for the Sales Tax Magento calculated and collected.	Line
Sales Tax Line Type	If you choose Line as the Sales Tax Behavior, this field specifies the Sales Order Line Type which should be used for the Sales Tax Lines CSM creates. The values can be G/L Account, Item, Resource, or Charge (Item).	G/L Account
Sales Tax Order Line No.	If you choose Line as the Sales Tax Behavior, this field specifies the Sales Order Line No. to be used (a value based on the Sales Tax Line Type chosen).	22720

Customers FastTab

Field	Description	Example Value
Customer Template	A valid BC Customer that CSM should use when dealing with a customer. When Creating customers, CSM will use this customer as a template for the customer's creation. When Sales Channel is chosen as a behavior or New Customers or Guest Customers, CSM will create the Sales Order with this customer and adjust the ship to address to the actual customers information.	CSMTEMPLATE
New Customer Behavior	Indicates how CSM will treat customers for what CSM determines is a new customer. Valid Choices are: Auto Create, Sales Channel, and Manual. For Magento 1.x, if the customer creates a new Magento account when checking out, or for existing Magento	Auto Create

	customers that have not been defined to CSM (either by setting up the customer as a Sales Channel Customer, or receiving a Magento Order for the customer), CSM considers them a new customer. If the behavior is set to Auto Create, CSM will automatically create a new BC customer and associated CSM Channel Customer based on the Customer Template defined above, this will occur when CSM builds the BC Sales Order from the Channel Order. If the behavior is set to Sales Channel, the CSM will not create a new customer, but will build the sales order to the Customer Template customer defined above and change the billing and ship-to addresses directly on the Sales Order appropriately. If the behavior is set to Manual, CSM will not automatically create a customer, and the Sales Order build process will fail unless a Channel Customer is manually setup and linked to a valid BC customer.	
Guest Customer Behavior	Indicates how CSM will treat customers for what CSM determines is a guest customer. Valid Choices are: Auto Create, Sales Channel, and Manual. For Magento 1.x, if the customer checks out as a guest CSM considers them a guest customer. If the behavior is set to Auto Create, CSM will automatically create a new BC customer and associated CSM Channel Customer based on the Customer Template defined above, this will occur when CSM builds the BC Sales Order from the Channel Order. Even though they checked out as a guest, CSM can still identify the customer if they use the same email address for future orders the customer may place. If the behavior is set to Sales Channel, the CSM will not create a new customer, but will build the sales order to the Customer Template customer defined above and change the billing and ship-to addresses directly on the Sales Order appropriately. If the behavior is set to Manual, CSM will not automatically create a customer, and the Sales Order build process will fail unless a Channel Customer is manually setup and linked to a valid BC customer.	Auto Create
Auto Create BC Contact	Indicates whether CSM will also automatically create a BC contact for any new customers CSM creates.	Yes
Default Customer Group ID.	Indicates which Magento Customer Group ID will be assigned to new customers sent to Magento. This ID will only be used if a relationship between the BC customer price group the BC customer is assigned to and Magento Customer groups does not exist in the CSM Price Group table. Normally the Magento General customer group has an ID of 1.	1
New Customer No. Series	Indicates which No. Series should be used when CSM automatically creates a new BC customer.	CSM-CUST

API Data FastTab

Field	Description	Example Value
Credentialing Sales Channel	Enter the sales channel whose API credential settings will be used for API activities. If this value is left blank, the channel's assigned credentials will be used for its own API calls. For more information on credentialing, see here.	
Store ID	Enter the Magento store ID that is represented by the sales channel. If you have multiple Magento stores that you want to integrate with Business Central, you must set up a separate sales channel for each one.	1
Store Code	It is possible to set up unique store codes for each Magento store. These codes are appended to a store's URL. If the sales channel is associated to a Magento store with a defined code, you can enter it here.	

Website ID	Enter the website ID for the Magento store that is associated to the sales channel. A website ID is unique from the store ID in that the latter identifies the Magento store itself, while the former identifies that store's website.	1
API Set Code	Identifies the API Set code that should be used for API communication with Magento.	MAGENTO2
API User ID / API User Password	Certain API calls are made against specific sales channel records. CSM will use the user ID and password that are assigned to a specific store when calls are made against that store. In scenarios where the same user ID and password apply to multiple stores, the credentialing sales channel functionality can be used.	

CSM Shipping Methods

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

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

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

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

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

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

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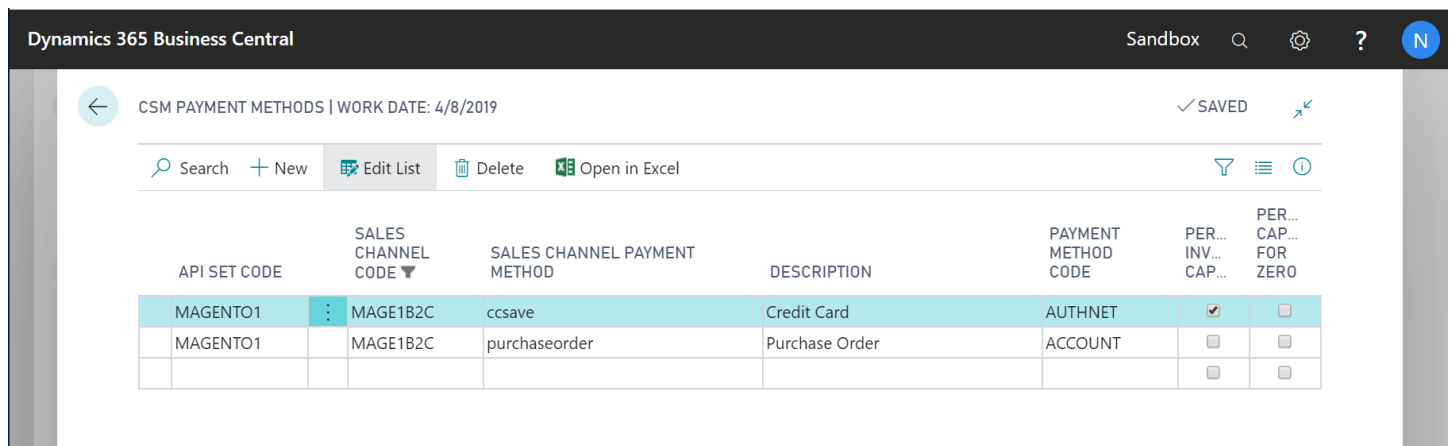
CSM Payment Methods

CSM needs to map the Payment Methods that Magento allows customers to choose in checkout, to Business Central Payment Methods for each Sales channel you have defined.

This Payment Methods cross reference information can be located on the Navigation ribbon of the CSM Sales Channel Card.
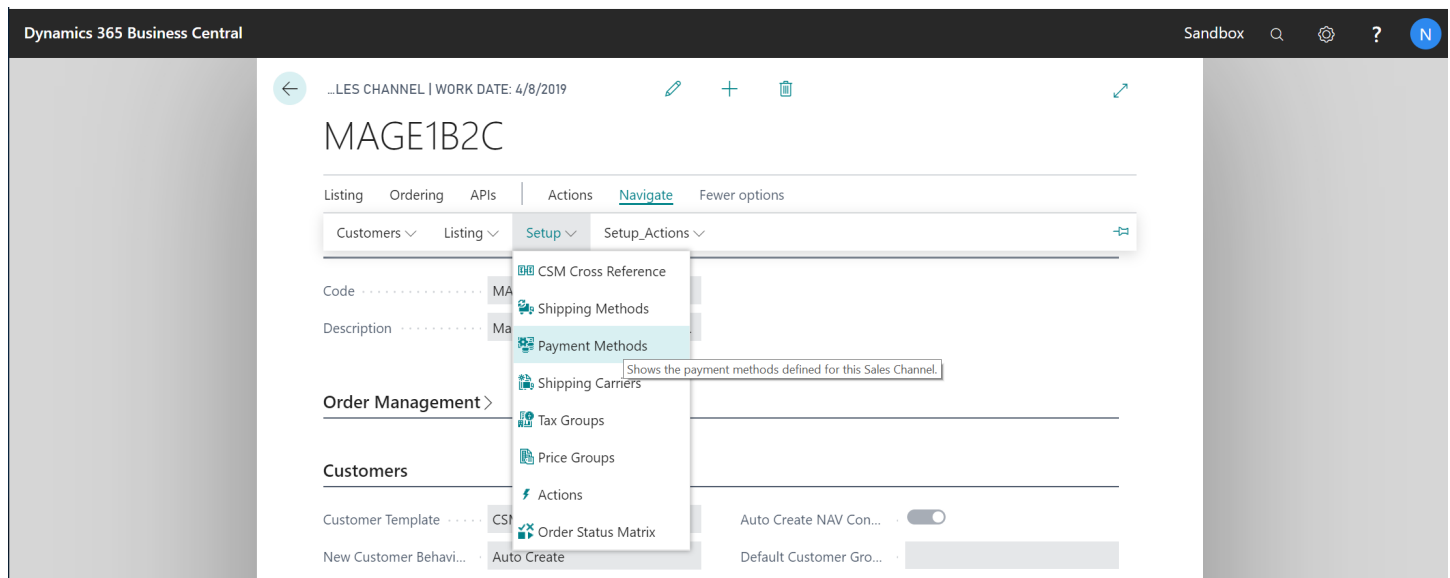
Each Payment Method that a customer can choose from on Magento, should be added and linked to the Business Central Payment Method it corresponds to. We also define here, whether we should send Magento a Capture Transaction (most often a Credit Card Settlement) right after sending Invoice Information. CSM will build the Business Central Sales Order with the BC Payment Method linked to the payment method code received from Magento. In the following example, we are linking 2 Magento payment methods to their Business Central Payment Method counter parts.

The Magento Payment Method Code can be found by looking in the mage_core_config_data table and filtering the config path to payment active. The code will be found in the middle of the path. For example, for the entry of payment/ccsave/active, the payment code Magento will store on the order and send to CSM will be ccsave.

CSM Shipping Carriers

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

CSM shipping carriers correspond to a subset of "delivery method" records in Magento. Magento uses this record type to represent all delivery scenarios, including generic ones such as free shipping and flat rate shipping, as well as specific shipping carriers. By default, Magento supports the following common carriers:

- DHL
- FedEx
- UPS
- USPS

Although extensions exist to add delivery methods for other carriers, it is not possible for Magento users to manually set up new records.

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

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

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

> *Note: the functionality to load CSM shipping carriers does not extend beyond the default carriers that are supported by Magento. If extensions that allow for the assignment of additional delivery methods are deployed*

in your Magento environment, you must manually set up the related CSM shipping carrier records in Business Central.

CSM Tax Groups

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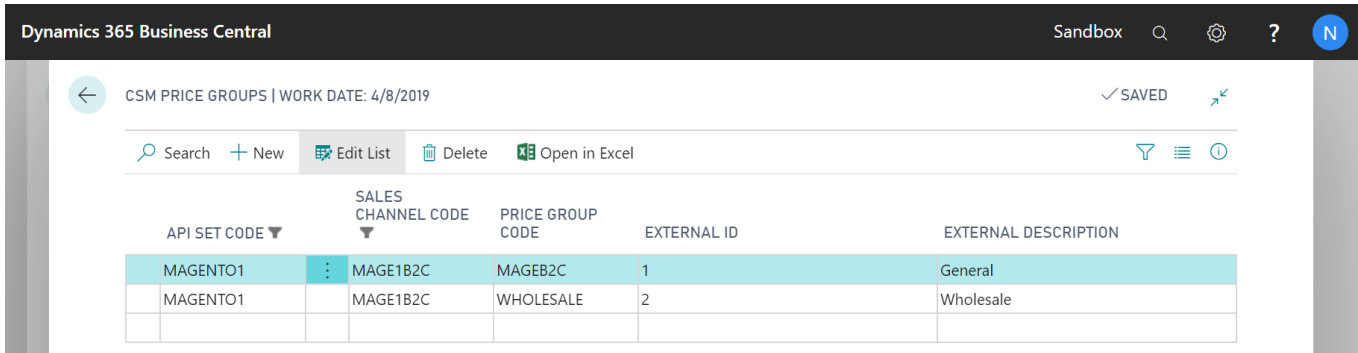
CSM Price Groups

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

This Price Group cross reference information can be located on the Navigation ribbon of the CSM Sales Channel Card.
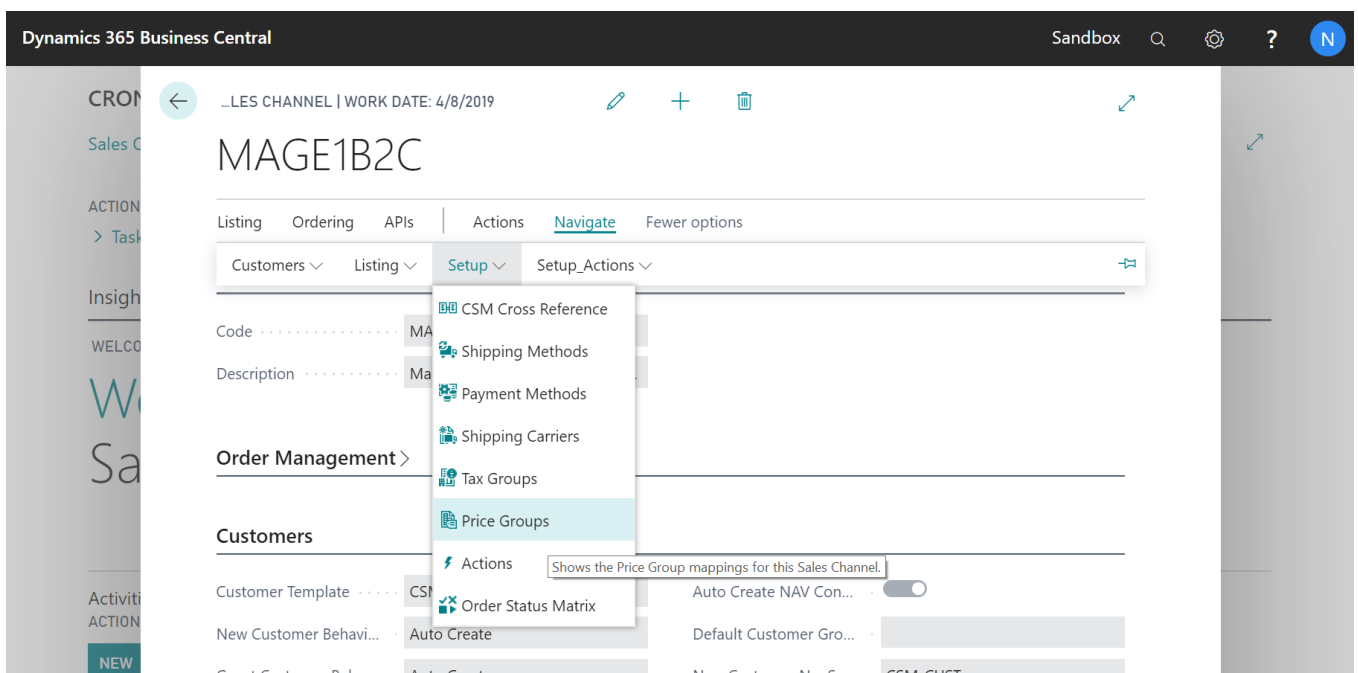
Each Business Central Price Group, that represents a customer group on Magento, should be added and linked to Magento. In the following example, we are linking 2 Business Central Price Groups to their Magento counter parts, which are the Magento ID of the Customer Group.

Manually Entering the External ID

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

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

## Retrieving Price Groups from Magento

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

1. Choose the 🔍 icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the CSM sales channel record for which you want to retrieve price groups.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Price Groups** action.
4. In the **CSM Price Groups** window, choose the **Actions** ribbon, then choose the **Retrieve Price Groups** action.

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

Sending Price Groups to Magento

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

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

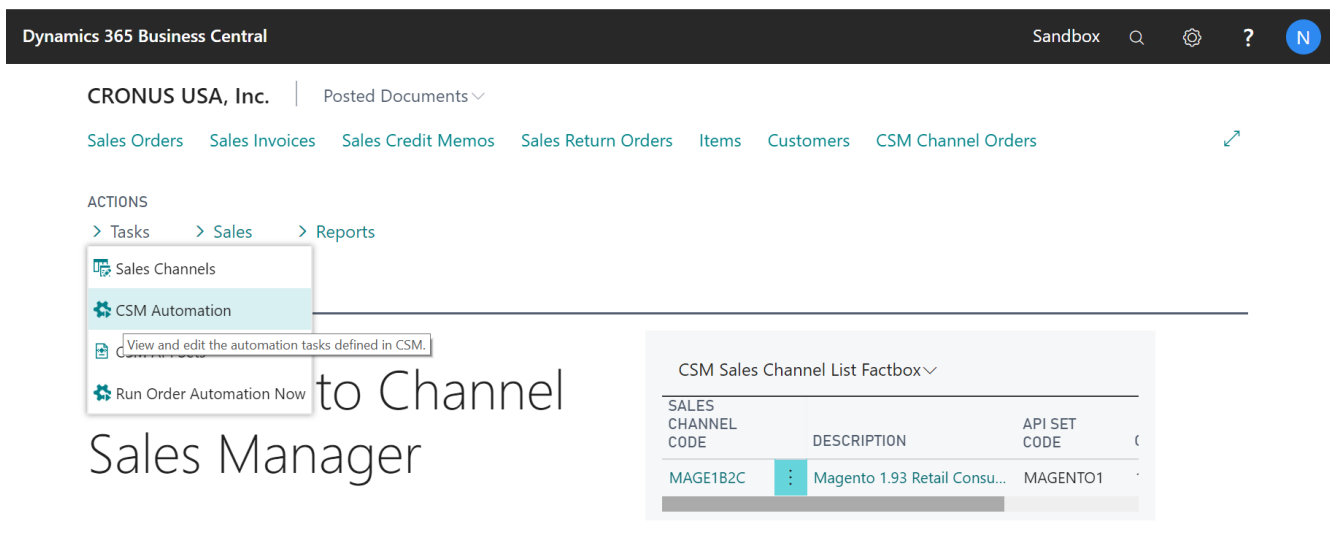6. Choose the **Actions** ribbon, then choose the **Send to External** action.

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

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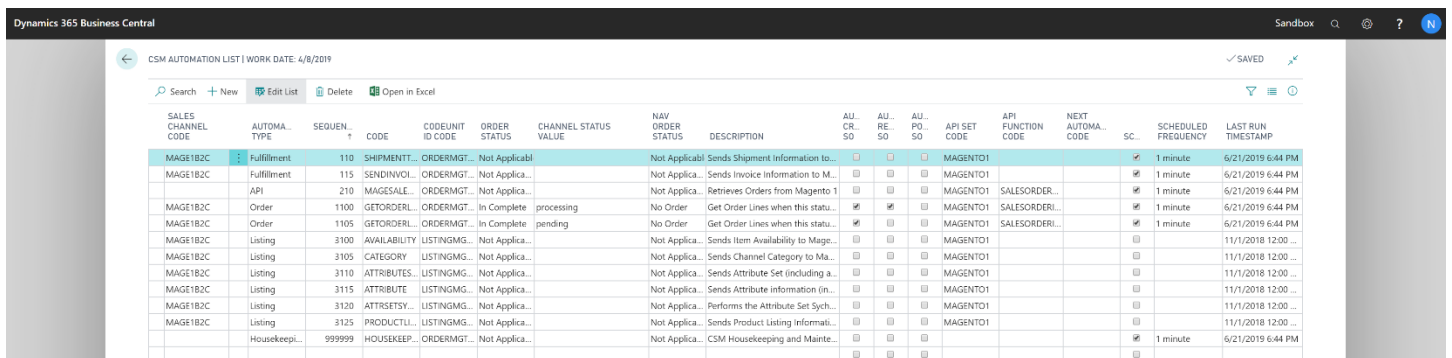
The Order Status Matrix is data that CSM uses to determine a Channel Order Status based on information received from Magento. This data is pre-loaded. Please change these status values carefully to ensure CSM integrity when assigning a status to a Channel Order.

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.

By default, there are two automation codeunits that you can schedule. These codeunits are identified by the Codeunit ID Code in the Automation List.

- ORDERMGTDEFAULT: performs automation related to CSM order management features. *(codeunit 70338206 "CSM Order Mgt Automation")*
- LISTINGMGTDEFAULT: performs automation related to CSM listing management features. *(codeunit 70338208 "CSM Listing Mgt Automation")*

In this document, we will go through those tasks relating to order management.

First note the column for sequence, this determines the order of processing of the tasks.

Fulfillment Automation Tasks

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

Send Shipment Information:

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

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

Automation Task – Send Invoice Information to Magento		
Field	Description	Example Value
Sales Channel	The Sales Channel for which Shipping Information should be sent.	MAGE1B2C
Automation Type	Should always be Fulfillment.	Fulfillment
Sequence	The Sequence in the Automation run that Shipping Information should be sent. It is best to have Shipping information be the first task executed.	110
Code	The code the Automation uses to know what to do. Should always be set to SHIPMENTTRACKING	SHIPMENTTRACKING
Codeunit ID Code	The Automation Codeunits use this code to determine whether they run this task. By default, this should be ORDERMGTDEFAULT. However, you could write your own Automation codeunit(s) to scale volume or gain better control over the schedule.	ORDERMGTDEFAULT
Order Status	This value is Not Applicable for Send Shipment information to Magento.	Not Applicable
Channel Status Value	This value is Not Applicable for Send Shipment information to Magento.	
BC Order Status	This value is Not Applicable for Send Shipment information to Magento.	
Description	A description of the entry.	Sends Shipment Information to Magento 1
Auto Create SO	This value is Not Applicable for Send Shipment information to Magento.	Not Checked

Auto Release SO	This value is Not Applicable for Send Shipment information to Magento.	Not Checked
Auto Post SO	This value is Not Applicable for Send Shipment information to Magento.	Not Checked
API Set Code	This value should be the API Set the Sales Channel uses	MAGENTO1
API Function Code	This value is Not Applicable for Send Shipment information to Magento.	
Next Automation Code	This value is Not Applicable for Send Shipment information to Magento.	
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run.	15 Minutes
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 12:00 AM

Send Invoice Information:

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

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

Automation Task – Send Invoice Information to Magento		
Field	**Description**	**Example Value**
Sales Channel	The Sales Channel for which Invoice Information should be sent.	MAGE1B2C
Automation Type	Should always be Fulfillment.	Fulfillment
Sequence	The Sequence in the Automation run that Invoice Information should be sent. It is best to have Invoice information be sequenced before the Order List API task.	115
Code	The code the Automation uses to know what to do. Should always be set to SENDINVOICE	SENDINVOICE
Codeunit ID Code	The Automation Codeunits use this code to determine whether they run this task. By default, this should be ORDERMGTDEFAULT. However, you could write your own Automation codeunit(s) to scale volume or gain better control over the schedule.	ORDERMGTDEFAULT
Order Status	This value is Not Applicable for Send Invoice information to Magento.	Not Applicable
Channel Status Value	This value is Not Applicable for Send Invoice information to Magento.	
BC Order Status	This value is Not Applicable for Send Invoice information to Magento.	

Description	A description of the entry.	Sends Invoice Information to Magento 1
Auto Create SO	This value is Not Applicable for Send Invoice information to Magento.	Not Checked
Auto Release SO	This value is Not Applicable for Send Invoice information to Magento.	Not Checked
Auto Post SO	This value is Not Applicable for Send Invoice information to Magento.	Not Checked
API Set Code	This value should be the API Set the Sales Channel uses	MAGENTO1
API Function Code	This value is Not Applicable for Send Invoice information to Magento.	
Next Automation Code	This value is Not Applicable for Send Invoice information to Magento.	
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run.	15 Minutes
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 12:00 AM

API Automation Tasks

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

API Sales Order List:

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

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

Automation Task – Retrieve Magento Orders		
Field	Description	Example Value
Sales Channel	This should be blank for Magento, CSM uses the API Set to download all Magento Orders for all sales channels tied to the API Set.	
Automation Type	Should always be API.	API
Sequence	The Sequence in the Automation run that Order List information is retrieved.	210

Code	This value is for your reference since the Automation Task uses the API Set Code and the API Set Function Code to determine what to do.	MAGESALESORDERLIST
Codeunit ID Code	The Automation Codeunits use this code to determine whether they run this task.	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 Magento 1
Auto Create SO	This value is Not Applicable for the API Sales Order List.	Not Checked
Auto Release SO	This value is Not Applicable for the API Sales Order List.	Not Checked
Auto Post SO	This value is Not Applicable for the API Sales Order List.	Not Checked
API Set Code	The Magento API Set to use when executing the Task	MAGENTO1
API Function Code	The API Function Code to Use when executing the Task. This will almost always be SALESORDERLIST for Magento 1.9 API Sets.	SALESORDERLIST
Next Automation Code	This value is Not Applicable for the API Sales Order List.	
Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run.	15 Minutes
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 12:00 AM

Order Automation Tasks

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

Get Order Lines Order Automation Task:

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

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

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

Scheduled	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
Scheduled Frequency	A duration value indicating how often this task should run.	15 Minutes
Last Run Timestamp	This will be Automatically set when the task executes to the Date Time of its last execution, as an initial value, you should set this to a lower value than the current date and time.	1/1/2019 12:00 AM

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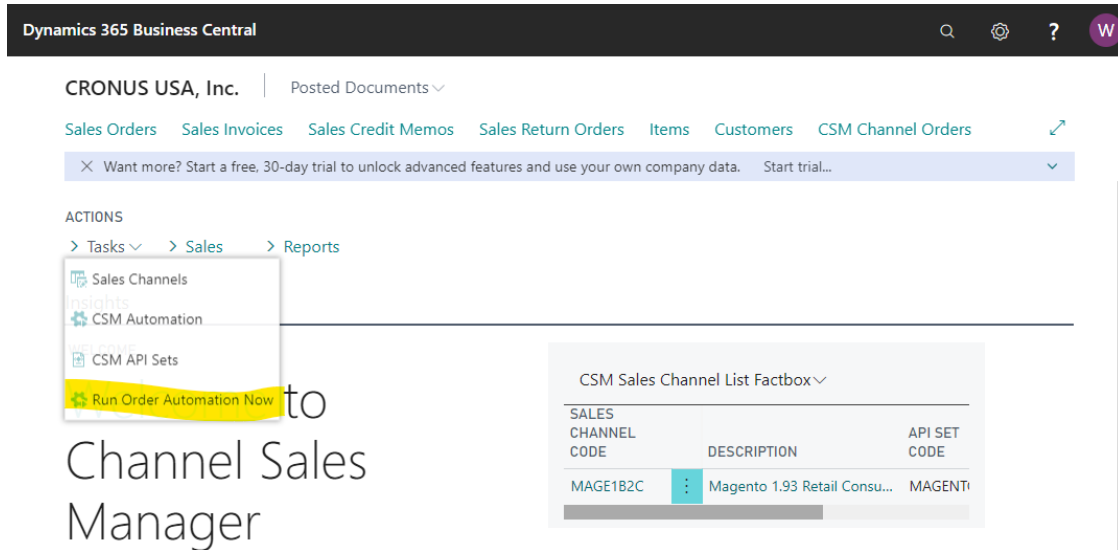
CSM Everyday Operations

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

Running the Automation Manually

We recommend that you schedule the automation jobs to run on a schedule as defined in the CSM Functionality Settings and Cross References Documentation.

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

Viewing Channel Orders

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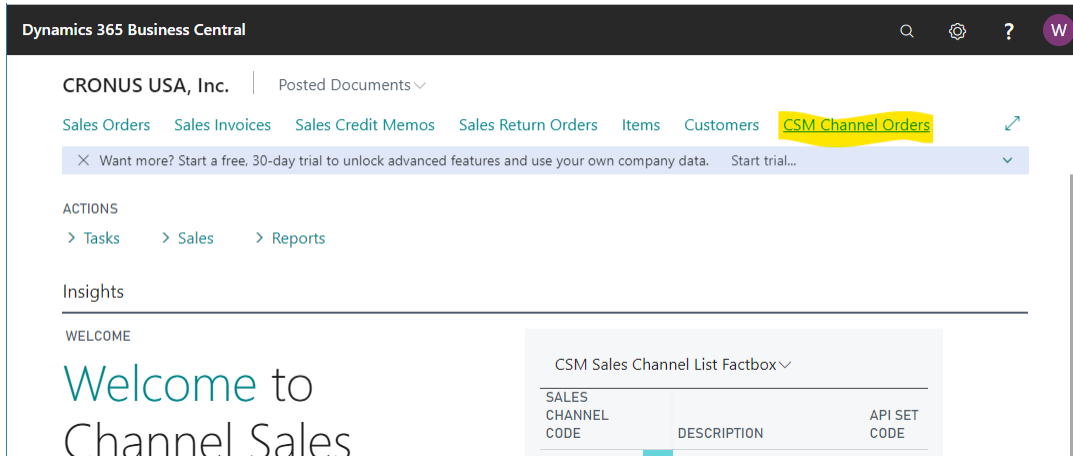
This will list all Channel Orders with a color-coded status. A CSM Channel Order is essentially the data received from Magento regarding an order, with some additional information as to the CSM status and links to other Business Central Information.

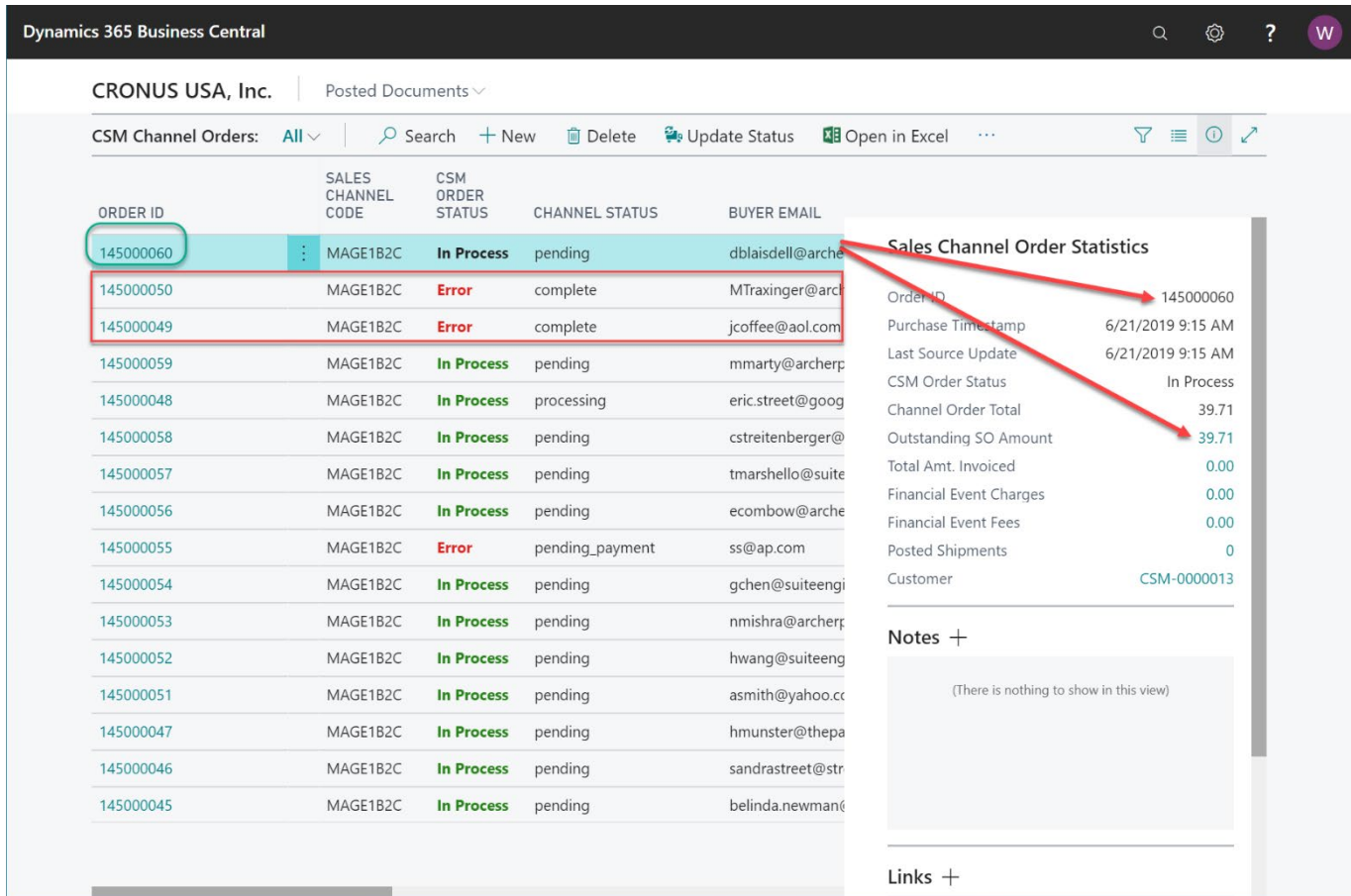In the above list, we see several orders that are In Process, meaning that they are active, and have Business Central Sales Orders linked to them.

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

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

Deleting Channel Orders

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

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

Once the deletion process is completed, the application will inform you of how many orders have been deleted (this number may be less than the originally selected quantity if any of the selected orders failed to meet the criteria mentioned above).
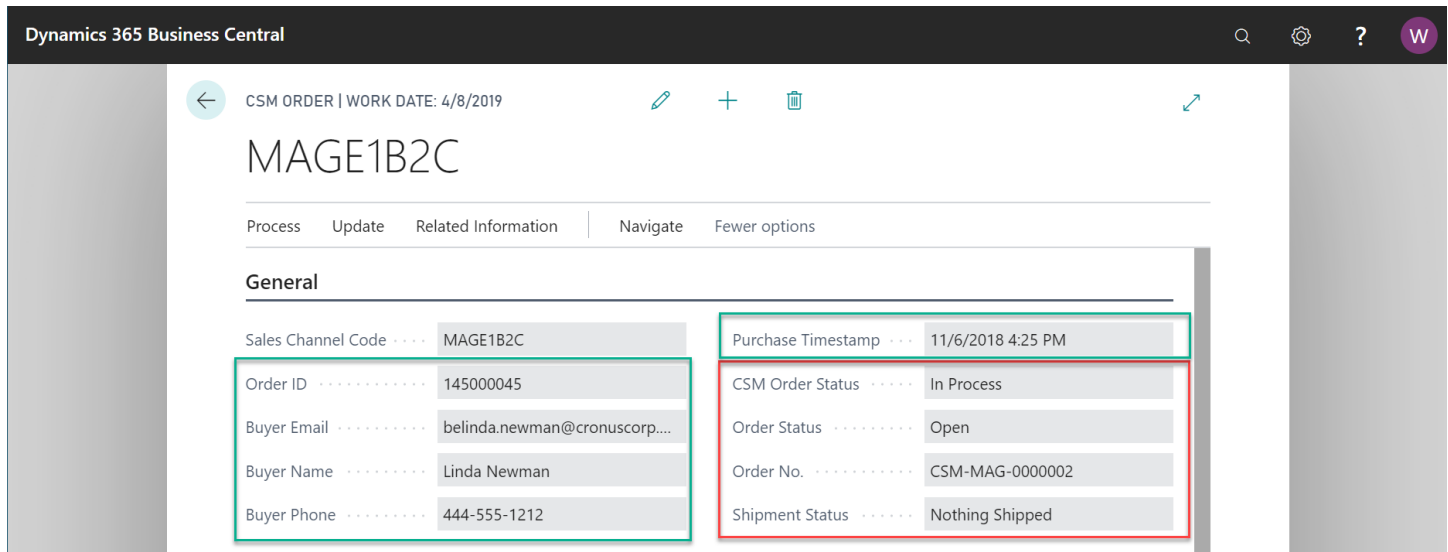
It is important to note that deleted CSM channel orders can be re-created in Business Central by opening the relevant sales channel record, setting the starting order retrieval date to reflect a date prior to the orders' creation, and then re-running the channel's automation routine. This is useful in scenarios where a missing or incorrect setup issue in a sales channel environment resulted in a large quantity of incorrect CSM channel orders within Business Central. If this occurs, the user can select all of these channel orders and delete them at once using the bulk delete functionality described here, correct the problem within the sales channel, then re-import all of the orders into Business Central.

Channel Order Card

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

General FastTab

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

- **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.

Channel Order Lines FastTab

The lines on the **Chanel Order Lines** FastTab display the order lines as received from Magento. Note that the Channel Item No. and Channel Item Description are how Magento knows the items as. So How does CSM create a Sales Order with a Channel Item No. that could potentially be different than how an Item is defined in CSM?

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

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

CSM Order Documents FastTab

The CSM Order Documents FastTab presented related channel documents that are associated to the order. Examples of channel documents include payments, shipments, invoices, and credit memos. As sales orders are shipped and invoiced in Business Central, additional lines for these document types are added to the CSM order. The fields that are populated on a given CSM order document line depend on the document type. For example, the **Channel Payment Method** field would be populated for payment type lines, but remain blank on lines for shipments.

Shipping FastTab

The next FastTab section on the Channel Order is Shipping Information as it was received from Magento.

Shipping

Ship Service Level	UPS_GND	Location ID	
Ship Service Name	United Parcel Service - Ground	Weight	3.96
Ship Service Description	United Parcel Service - Ground		

SHIP TO ADDRESS

Ship Service Level Category	
Number of Items Shipped	0.00
Number of Items Unshipped	0.00
Earliest Ship Date	
Latest Ship Date	
Earliest Delivery Date	
Latest Delivery Date	
CBA Displayable Ship Label	

Ship To Name	Belinda Newman
Ship To Address 1	140 Cronus Corp Drive
Ship To Address 2	
Ship To Address 3	
Ship To City	South Bend
Ship To State	Indiana
Ship To Postal Code	39392
Ship To Country	US
Ship To Phone Number	444-555-1212

The Ship Service Level from Magento is used when building the Sales Order to set the Shipping Agent and Shipping Agent Service. CSM looks in at the Sales Channels Shipping Methods to determine the correct value. If the value is not found in the Sales Channel Shipping Method table, the Business Central Order Creation will cause an error status to occur on the Channel Order.

The Ship To Address information in this FastTab will be used to populate the Business Central Sales Order Ship To information.

Invoicing FastTab

The next FastTab section on the Channel Order is Invoicing Information as it was received from Magento.

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

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

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

Channel Data FastTab

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

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

- Channel Customer Code – The Magento ID of the customer who placed the order. CSM uses this value to determine whether the customer already exists in Business Central or needs to be created (See the discussion regarding Sales Channel Customers).
- Guest Customer – Indicates whether the Customer used Guest Checkout on Magento when placing this order. Note that CSM uses this value to determine the appropriate Customer behavior. Also, CSM can determine that a Customer (who used the same email address on a previous order) previously was setup as a guest customer, and now has registered an account on the Magento store.
- Seller Order ID – The Order ID (Not Order Number) that Magento assigns to the order.
- Store ID – This is the Magento store ID.
- Store Name – A text version of the website and store that the Magento order occurred in.

- Marketplace ID – This contains the Magento Website ID that the order was placed on.
- Channel Order State – This contains the channel order's state as received from Magento. Order states represent a predetermined workflow that is used by Magento to understand the condition of a given order and process it accordingly.

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

Refund Information FastTab

Refund information is currently not supported by CSM for Magento at this time.

Information FastTab

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

Information

Purchase Timestamp	11/6/2018 4:25 PM	Imported Time	8:44:12 PM
Payment Timestamp	11/6/2018 4:25 PM	Acknowledgement Required	(off)
Last Source Update	11/6/2018 4:25 PM	Acknowledgement Processed	
Last Import Update	7/1/2019 8:44 PM	Last Acknowledgement Sent	
Imported by User ID	WMS	Last Acknowledgement Result	
Imported Date	7/1/2019	Status Text	A Sales Order was built Successfully for External

Channel Order Actions

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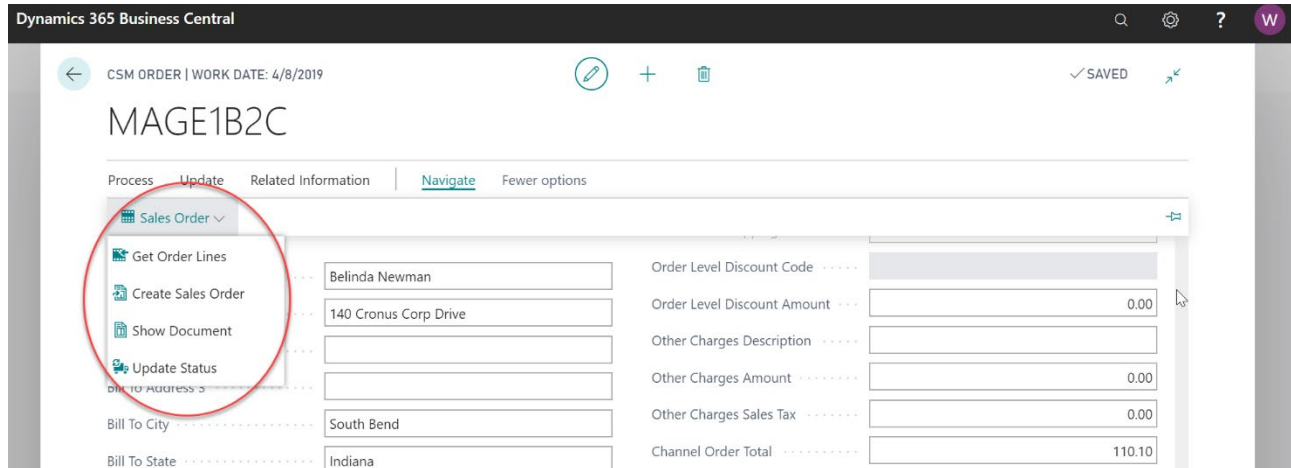
- Get Order Lines – This Action will communicate with Magento to update the order and its lines.
- Create Sales Order – This action will attempt to use the data retrieved from Magento to create a Business Central Sales Order. Note that if CSM cannot perform this because of an error, the traditional Business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

Sales Channel Customers

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

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.

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

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

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

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

You can also set up sales channel customers in Business Central and then send these records to your Magento platform:

1. From the **Sales Channel** card, choose the **Related** ribbon, then choose the **Add Channel Customer** action under the **Customers** menu.
2. In the channel customer wizard, specify a Business Central customer and (optionally) contact record.
3. Choose the **Next** button.
4. On the next page of the wizard, specify a channel user name. CSM will assign the selected customer/contact's e-mail address by default, but it can be manually changed, if necessary. Magento will assign this value to the customer's e-mail, however, so an e-mail address should be specified here.
5. Choose the **Next** button.
6. On the final page of the wizard, choose the **Finish** button. CSM creates a new CSM customer record.

7. From the **Sales Channel** card, choose the **Related** ribbon, then choose the **Sales Channel Customers** action under the **Customers** menu.
8. On the **CSM Customers** page, choose the CSM customer line that was just created with the channel customer wizard.
9. Choose the **Actions** ribbon, then choose the **Send to Channel** action under the **Channel Integration** menu.

CSM will send this information to your connected Magento platform. If a customer record with the same channel user code does not currently exist as a record, a new Magento customer record will be created. As part of this process, CSM will update the CSM customer record in Business Central with the external ID that was assigned by Magento to identify the record as unique.

Sending Shipment Information

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

When you post a shipment for a Business Central Sales Order that relates to a CSM Channel Order, CSM intercepts that event and sends the shipment information. It will pull the tracking number from the Sales Order Package Tracking No. field. This information is entered in a new shipment line on the CSM order's **CSM Order Documents** FastTab. If the shipment is successfully sent to Magento, CSM retrieves the external ID that is assigned to the Magento shipment record and enters that on the CSM order document record, as well. If for some reason the communication fails upon posting, the CSM automation will look for shipment documents that do not have an External ID and attempt to resend them.

Sending Invoice Information

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

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

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

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 records by choosing an order line in the Channel Order Archive Lines FastTab, choosing the Manage action, and then choosing the Order Line Archive Options action.

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

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

Troubleshooting CSM Activities

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

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

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

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

In some troubleshooting scenarios, it is necessary to review the specific CSM processing log entries that were created as part of a routine. While it is possible to access a list of all CSM processing log entries in Business Central, a better option

is to open the relevant CSM API Message card and choose the Related CSM Processing Log Entries action in the ribbon. This will present a list of CSM processing log entries that is filtered by the relevant CSM API message ID. From here, additional filters can be set to further streamline the information, and the necessary research can occur.

Reprocessing CSM API Messages

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

To edit and reprocess an API message:

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

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

CSM Additional Details

CSM API Data

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

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

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

Field	Description	Example Value
Code	This is unique code that identifies the API set. It can be any value you wish, but we recommend naming it something meaningful that describes the external source the API set communicates with. Our example value tells us that we are communicating with a Magento 1.xx external system.	MAGENTO_M1
Description	This is a text description of the API set. It can be any value you wish, but we recommend using a meaningful description. Note, that you may deal with other channels in the future (Magento, Magento 2.xx, Amazon, etc.) and may even require a 2nd API set for an additional Magento 1.x instance you may deploy.	Magento version 1.96 Soap V2 API

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