

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: 1.15

Last Revised: October 28, 2021



ORDER MANAGEMENT SETUP

CSM for Magento 1.15 (D365 Business Central Version: Platform 15.0.36510.0 + Application 15.0.36560.0)

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.

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



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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.

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Find Channel Sales Manager for Magento in the list of extensions, and select the ellipses (three vertical dots), and select configure from the drop-down menu.

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Ensure that the "Allow HttpClient Requests" switch is on.

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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".

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

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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:

- 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.

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Creating and Managing Your CSM Subscription

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

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

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

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

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

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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. While it is possible to manually enter the initial setup values, CSM for Magento comes with a setup wizard that streamlines this process; it is recommended that you use this setup wizard to create your sales channels.

Select Actions -> Magento Quick Setup.

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CSM Setup		
New Process Actions Navigate	Fewer options	
Load CSM Triggers Magento Quick	Setup	⊄ -

This will start the Magento Setup Wizard.

On the first page of the wizard, select your version of Magento, and turn on the last three switches.

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



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.	MAGENTO1
Description	This is a text description of the API set. It can be any value you wish, but we recommend using a meaningful description. Note, that you may deal with other channels in the future (Magento, Magento 2.xx, Amazon, etc.) and may even require a 2 nd API set for an additional Magento 1.x instance you may deploy.	Magento version 1.96 Soap V2 API
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.myc ompany.com/api/v2_so ap/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
АРІ Кеу	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

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		This is a der	mo store. /	Any orders pla	aced through this sti	ore will not be honored or fulfilled.
n Magento ⁻ Admin Pane	el					Global Record Search
Dashboard Sales Catalog	Customers Promotions	Newsletter	CMS	Reports	System	
🕕 One or more of the Cache Types are in	walldated: Blocks HTML output. Cli	ck here to go to <u>C</u>	Cache Man	gement and n	My Account	
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On the third page of the wizard, enter information relating to your Magento Sales Channel (Store).

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	License and Registration	Magento Sales Channel Code	AGE1B2C_STORE							
	License Company Code	Magento Sales Channel Descript	agento 1.9 Retail Store		engine.co	om/licer	ise-agree	mer		
	License Contact Name				engine.co	om/help				
	License Contact Email									
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Code	e This is unic we recomi	ue code that identifies the Sales nend naming it something mean	s Channel. It can be any value ingful that describes the Sales	you w Chani	ish, bu nel.	t I	MAGEN	ITO_B2	C	

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

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

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CSM Setup									
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Logging Key Separator		Back Next Fi	nish						

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

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

namics 365 v E	Business Central	CSM Setup	Environment Sandbox	~	Ŷ	٢	∎,	٢	?	8
			+ 🛍					7 ^K		
CSM Setu	up									
New Process	Navigate Less o	options								
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License Company Code			RegistrationURL	http://s	suiteenç	gine.com/l	icense-agre	€€		
License Contact Name			HelpURL	http://s	suiteeng	gine.com/ł	nelp			
License Contact Email										
Processing Option	IS									
LS Retail Installed										
Lanham Eship Installed			~3							
Logging Options										
Logging Key Separator	±		Log Retention	30 day	s					
Logging Key Separator Default AP Log Level	•••• ±	0	API Message Retention	30 day 30 day	s s)	
Logging Key Separator Default AP Log Level · · ·	±	0	API Message Retention	30 day 30 day	s)	

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

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.

X This is a sandbox environment (preview) for t	test, demo, or development purpo	oses only. Don't sho	w this again.		
ACTIONS > Tasks > Sales > Reports					
Insights					
Welcome to Ch	lannel	CSM Sales Ch	nannel List Factbox \sim		
Sales Manager		SALES CHANNEL CODE	DESCRIPTION	API SET CODE	CHAI
Jaies Manager		MAGE1B2C	Magento 1.93 Retail Consu	MAGENTO1	1

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

Dynamie	cs 365 Busines	ss Central Sandi	оох	Q	© ?
	CRONU	← _LES CHANNEL WORK DATE: 4/8/2019 🖉 + 💼 2			
	Sales Orde \times This is	MAGE1B2C			~
	ACTIONS	Listing Ordering APIs Actions Navigate Fewer options			
	> Tasks	Test Channel Communication I 2 Automation List -≍ This verifies communication for the selected Sales Channel			
	Insights	Code · · · · · · · · · MAGE1B2C			
	WELCOME	Description · · · · · · Magento 1.93 Retail Consumer			
	We	Order Management			
	Sale	GIFT WRAP CHARGES			

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

- CSM SALES CHANNEL I	WORK DATE: 4/8/2019	0 -	- 🗊		, ^e
MAGE1B2	2C				
Listing Ordering	APIs Actions Navigate	Fewer options			
General					 - 1
Code	MAGE1B2C				
Description	Magento 1.93 Retail Cons	umer Site			_
Order Manageme	nt Cor	nmunication Test was suce	essful.		-
Inventory Location	MAIN				
Payment Behavior	Payments			ок	- 1

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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:

ami	cs 3(55 Business Central					Sandbox	Q	Ø	?	N
~		sales channel I work MAGE1B2C	DATE: 4/8/2019) 6	19 +	Û			ی ^{لا}		
		Listing Ordering APIs Customers V Listing V	Action: Setup V	s <u>Navigate</u> Fe Setup_Actions √	ewer options APIs and At	, tomation \vee			다		l
		Code · · · · · · · · · · · · · · · · · · ·	MAGE1B2C Magento 1.93	Starting Order R	ketrieval Date d	Allows you to enter the date and time that the auto automation. Once the automation runs, it will aut	mation will use to omatically reset th	o commur le cutoff d	nicate to the	channel d there are	uring orde no gaps ir
		Order Management		Load Automatio	n List						I

The Starting Date and Time dialog will then appear.

Dynamics	365 Business Central	Sandbox	Q	Ø	?	N
~	EDIT - CSM USER INPUT			\swarrow		
	ORDER RETREIVAL START DATE AND TIME				L	
	Pleae enter a valid date and time in the below fields. This date and time will be used in the next automation where order channel. All orders, that are new, or have been changed after this date and time will be retrieved. The automation will au normal operations. This dialog is strictly for initial use, or if it is desired to manually adjust the date/time.	s are retrived to a set to matically set	rom the this val	ue in	l	l
	Order Retrieval Start Date					
	Order Retrieval Start Time					
					L	
					L	
		OK		Cancel	l	
	Inventory Location MAIN					

Enter your desired starting date and time for order retrieval, then you are all set to download orders.

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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.

Dynamics 365 Business Central		Sandbox Q	© ? N
CRONUS USA, Inc. Posted Documents ~			
Sales Orders Sales Invoices Sales Credit Memos Sales Return Ord	ders Items Customers	CSM Channel Orders	7 ⁴
imes This is a sandbox environment (preview) for test, demo, or development purp	ooses only. Don't show this aga	ain.	~
ACTIONS Tasks > Sales > Reports Sales Channels CSM Automation Open a list of the Sales Channels defined in CSM.			
E CSM API Sets	COM Color Channel List Fr		n /
& Run Order Automation Now to Channel	SALES	actbox >	
Sales Manager	CHANNEL CODE DESCRIP MAGE182C : Magento	TION API SET CODE 1.93 Retail Consu MAGENTO1	
Activities >> ACTIONABLE CHANNEL ORDERS			
NEW CHANGED ORDERS WITH ERRORS			

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



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

Dynamics 365 Business Central			Sandbox Q @ ? N
CRONUS USA, Inc. \leftarrow Sales Orders Sales Inv.	Les channel I work date: 4/8/2019	+ 10 ✓ SAVED ∠*	2
ACTIONS > Tasks > Sales	Listing Ordering APIs Actions Navigate Fo	ewer options	
Includes	General		
WELCOME	Code ····· MAGE1B2C		
Welcom	Description Magento 1.93 Retail Consumer Si		
Channel	Order Management		
Sales	Inventory Location ····· MAIN ···	GIFT WRAP CHARGES	
Juics	Payment Behavior · · · · Payments •	Gift Wrap Line Type · · · Item •	
Manage	Payment Method Code · V	Gift Wrap Order Line	
	SO No. Series CSM-ORD-MAG ~	OTHER CHARGES	
	Channel Dimension · · · SALES · ·	Other Charges Behavi • None •	
Activities ~ ACTIONABLE CHANNEL OR	Channel Dimension 2 🗤	Other Charges Order • Item •	
NEW	NAV SO build Codeu 70338209	Other Charges Order ·	
0	SHIPMENT BEHAVIOR	SALES TAX	
U	Send Shipment Infor 🕐 💶	Sales Tax Behavior	
>	Send Shipment When	Sales Tax Order Line T • G/L Account •	
CHANGED	INVOICE BEHAVIOR	Sales Tax Order Line 22720 V	
0	Send Invoice Informa		
	Send Invoice When · · · · Immediate •		
5	Send Invoice Capture \cdots 💽		
ORDERS WITH ERRORS	Customers >		

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	BLUE			
	Created for this Sales Channel will specify this inventory location. Listing Management				
	will also use this value in its inventory availability calculation.				

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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.	

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Channel Sales Manager

Listing Management Setup

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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

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General					
Code · · · · · · · · · · · · · · · · · · ·	MAGE1B2C				
Description	Magento 1.93 Retail C	onsumer Sit			
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	Customers FastTab	
Field	Description	Example Value
Customer Template	A valid BC Customer that CSM should use when dealing with a customer. When Creating customers, CSM will use this customer as a template for the customer's creation. When Sales Channel is chosen as a behavior or New Customers or Guest Customers, CSM will create the Sales Order with this customer and adjust the ship to address to the actual customers information.	CSMTEMPLATE
New Customer Behavior	Indicates how CSM will treat customers for what CSM determines is a new customer. Valid Choices are: Auto Create, Sales Channel, and Manual. For Magento 1.x, if the customer creates a new Magento account when checking out, or for existing Magento customers that have not been defined to CSM (either by setting up the customer as a Sales Channel Customer, or receiving a Magento Order for the customer), CSM considers them a new customer. If the behavior is set to Auto Create, CSM will automatically create a new BC customer and associated CSM Channel Customer based on the Customer	Auto Create

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Channel Sales Manager

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	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
API Channel Identifier	For Magento, this will be the Magento ID of the Store.	1
Website ID	For Magento, this will be the Magento ID of the Website.	1
API Set Code	Identifies the API Set code that should be used for API communication with Magento. This should be the value that you used to setup the Magento API Set in the CSM API Sets section earlier in this document.	MAGENTO1

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CSM Shipping Methods

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

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

Dynamics 365 Business Central		Sar	ndbox	Q	Ø	?	N
CRONUS USA, Inc. 🔶	LES CHANNEL WORK DATE: 4/8/2019 🖉 + 🖻 🗸 SAVED 🧷						
Sales Orders Sales Inv	MAGE1B2C				2		١.
ACTIONS > Tasks > Sales	Listing Ordering APIs Actions <u>Navigate</u> Fewer options						
	Customers V Listing V Setup V Setup_Actions V ->						
Insights	Godo MO						
WELCOME	Shipping Methods						
Welcom	Description						
Clearanal	Crider Management						
Channel	Prover Management /						
Sales	Customers						
Managa	f Actions Auto Grante MAY Con						
ivianage	Auto Create NAV Con						
	New Customer Behavi Auto Create Default Customer Gro						

Each Shipping Method that a customer can choose from on Magento, should be added and linked to the Business Central Shipping Agent and Service it corresponds to. We also define here, how CSM should account for Shipping fees charged to the customer. In the following example, we are linking 3 Magento shipping methods to their Business Central counter parts.

Dynamics 365 Bus	siness Central										Sandbox	Q	Ø	?	N
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Sales (MA		> Search + N	lew	🐯 Edit List	📋 Delete 🛛 🚺 Open in Excel			Y	≣ ()			Ż	•	
ACTION > Tas	Listing		API SET CODE	9	SALES CHANNEL CODE T	SALES CHANNEL SHIPPING METHOD	SHIPPING AGENT CODE	SHIPPING AGENT SERVICE CODE	SHIPPING ORDER CHARGE TYPE	SHIPPING ORDER CHARGE N					
Insigh	Genera		MAGENTO1	÷N	MAGE1B2C	FLATRATE_FLATRATE	UPS	GROUND	G/L Account	45120					
	Code · · ·		MAGENTO1	N	MAGE1B2C	UPS_3DS	UPS	3DAY	G/L Account	45120				_	
	Descriptic		MAGENTO1	N	MAGE1B2C	UPS_GND	UPS	GROUND	G/L Account	45120					

The Magento Shipping Method Code can be found on Magento by looking in the mage_core_config_data table and filtering the config path to carriers.





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.

Dynamics 365 Business Central		Sandbox	Q	Ø	?	N
	 LES CHANNEL WORK DATE: 4/8/2019 Hage1B2C 					
	Listing Ordering APIs Actions <u>Navigate</u> Fewer options					
	Customers V Listing V Setup V Setup_Actions V -+=					
	Code · · · · · · · · · MA					
	Description · · · · · · · Ma 👺 Payment Methods					
	Order Management > Shows the payment methods defined for this Sales Channel. Image: Tax Groups Image: Tax Groups					
	Customers Brice Groups					
	Customer Template · · · · · CSt * Order Status Matrix Auto Create NAV Con · · · · · · · · · · · · · · · · · ·					
	New Customer Behavi Auto Create Default Customer Gro					

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.

Dynamics 36	5 Business Central				Sand	lbox C	X @	?	N
(CSM PAYMENT METHODS	S WORK DATE:	4/8/2019			√ SAVEI			
	\wp Search + New	🐯 Edit List	🔟 Delete 🛛 💶 Open in Excel			∇	≣ ()		
	API SET CODE	SALES CHANNEL CODE T	SALES CHANNEL PAYMENT METHOD	DESCRIPTION	PAYMENT METHOD CODE	PER INV CAP	PER CAP FOR ZERO		
	MAGENTO1	: MAGE1B2C	ccsave	Credit Card	AUTHNET	ø			
	MAGENTO1	MAGE1B2C	purchaseorder	Purchase Order	ACCOUNT				



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

CSM needs to map the Shipping Carriers that Magento presents to customers in its Shipment Notifications, to Business Central Shipping Agents and Services for each Sales channel you have defined.

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

Dynamics 365 Busines	ss Central Sanc	dbox	Q	Ø	?	N
¢	LLES CHANNEL WORK DATE: 4/8/2019	2				
	Listing Ordering APIs Actions <u>Navigate</u> Fewer options					
	Customers \checkmark Listing \checkmark Setup \checkmark Setup_Actions \checkmark	-12				
	BIL CSM Cross Reference Code MA Shipping Methods Description Ma Payment Methods					
	Order Management > Shipping Carriers Shows the Shipping Carriers defined for this Sales Channel. The Sales Channel may want to ke Tax Groups	now whic	h carrier	was us	ed to ship a	an order, ti
	Customers Actions Customers					
	Customer Template · · · · CSI Order Status Matrix					
	New Customer Behavi Auto Create Default Customer Gro					

amics 365 Business (Central					Sandbox	Q	Ø	?	
CRONUS USA, In	Posted	Documents \vee								
CSM Shipping Carrie	rs: 📔 🔎 Sea	rch + New	Manage \smallsetminus	💶 Open in Excel			Y	≣	()	7 ⁴
API SET CODE	SALES CHANNEL CODE T	SHIPPING AGENT CODE	EXTERNAL	ID	EXTERNAL DESCRIPTION	TRACKING LAE	EL			
MAGENTO1 :	MAGE1B2C	DHL	dhl		DHL	DHL Tracking N	lumber			
MAGENTO1	MAGE1B2C	FEDEX	fedex		Federal Express	Federal Expres	s Trackir	ng Nur	nber	
MAGENTO1	MAGE1B2C	OWN LOG.	custom		Custom Shipping	Bill of Lading				
MAGENTO1	MAGE1B2C	UPS	ups		UPS	UPS Tracking N	lumber			
	API SET CODE MAGENTO1 MAGENTO1 MAGENTO1 MAGENTO1	API SET CODE SALES CHANNEL CODE SALES CHANNEL CODE MAGENTO1 I MAGE1B2C MAGENTO1 MAGE1B2C MAGE1B2C MAGENTO1 MAGE1B2C MAGE1B2C	API SET CODE SALES CAGENTO1 Posted Documents V MAGENTO1 MAGE1B2C DHL MAGENTO1 MAGE1B2C OWN LOG. MAGENTO1 MAGE1B2C UPS	API SET CODE SALES COMUNICATION SALES SHIPPING API SET CODE SALES SHIPPING EXTERNAL MAGENTO1 I MAGE1B2C DHL dhl MAGENTO1 MAGE1B2C OWN LOG. custom MAGENTO1 MAGE1B2C UPS ups	Ammics 365 Business Central CRONUS USA, Inc. Posted Documents> CSM Shipping Certries: Posted Documents> Manage V Posted Documents> CSM Shipping Certries: Posted Documents> Manage V Magento1 MAGE1B2C OWN LOG. Magento1 MAGE1B2C OWN LOG. Custom Magento1 MAGE1B2C OWN LOG. Custom Magento1 Magento1	Ammics 365 Business Central CRONUS USA / Inc. Posted Documents > CSM Shipping Certers	Ammics 365 Business Central Posted Documents CRONUS US A, Inc. Posted Documents CSM Shipping Carriers Posted Documents API SET CODE SALES CODE T SALES CODE T SHIPPING AGENT CODE MAGENTO1 I MAGENTO1 MAGE1B2C MAGE1B2C OWN LOG. Custom Custom Shipping MAGENTO1 MAGE1B2C MAGENTO1 MAGE1B2C MAGENTO1 MAGE1B2C MAGENTO1 MAGE1B2C OWN LOG. custom Custom Shipping Bill of Lading MAGENTO1 MAGE1B2C UPS ups	Ammics 365 Business Central Posted Documents CRONUS US A Justic Posted Documents CSM Shipping Currers: Posted Documents Posted Documents CSM Shipping Currers: Posted Documents Posted Documents CSM Shipping Currers: Posted Documents SALES CMAGENTO1 SALES MAGENTO1 MAGE1B2C MAGENTO1 MAGE1B2C MAGENTO1 MAGE1B2C OWN LOG. custom Custom Shipping Bill of Lading MAGENTO1 MAGE1B2C UPS ups	API SET CODE SALES SALES SHIPPING CODE T NAGE1B2C MAGENTO1 MAGE1B2C MAGENTO1 MAGENTO1 MAGENTO1	Ammics 365 Business Central CRONUS USA, Inc. Posted Documents CSM Shipping Certies: Posted Documents Posted Terrison API SET CODE SALES SALES CODE SALES SHIPPING SALES CODE SALES SHIPPING SHIPPING SHIPPING SHIPPING SALES SHIPPING SHIPPING </th

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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.

Dynamics 3	365 Busines	ss Central	Sandbox	Q	Ø	?	N
CF		LES CHANNEL WORK DATE: 4/8/2019 🖉 🕂 🔟	2				
Sa	lles C	MAGE1B2C				2	
AC	TION	Listing Ordering APIs Actions <u>Navigate</u> Fewer options					
,	IdSk	Customers \checkmark Listing \checkmark Setup \checkmark Setup_Actions \checkmark	-H				
ln:	sigh	Get CSM Cross Reference			÷		
WI	ELCO	Description			- 1		
\vee	\mathcal{N}	🦉 Payment Methods					
C		Crder Management >			- 1		
2	00	Tax Groups			- 1		
		Customers Price Groups					
		Actions Shows the Price Group mappings for this Sales Channel.					
Ac	tiviti	Customer Template · · · · · CSt 🍄 Order Status Matrix			- 1		
AL	TION	New Customer Behavi Auto Create Default Customer Gro			- 1		
N	NEW	Guest Customer Beha Auto Create New Customer No. Se CSM-CUST					

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.

Dynamics 36	55 Business Central				Sandbox	Q	Ø	?	N				
\	CSM PRICE GROUPS WORK DATE: 4/8/2019												
	✓ Search + New	O Search + New By Edit List Delete Delete Open in Excel											
	API SET CODE T	:	SALES CHANNEI T	L CODE	PRICE GROUP CODE	EXTERNAL ID		EXTERNAL DESCRIPTION					
	MAGENTO1	÷N	MAGE1B2	2C	MAGEB2C	1		General					
	MAGENTO1	N	MAGE1B2	2C	WHOLESALE	2		Wholesale					

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The Magento Customer Group IDs can be found on the Magento Admin Panel: Customers > Customer Groups page. You can find the ID of a Magento Customer Group in the first column of the list.

M	lagento ⁻ /	Admin Pan	el					C	lobal Record Sear	rch	Lo	gged in as api	nagento_adm	in ∣ Monday, January 2	8, 2019 <u>Log (</u>
Dashb	oard Sales	Catalog	Customers	Promotions	Newsletter	CMS	Reports	System						💮 Get I	elp for this paç
Import	tant: Formkey va	lidation on chec	kout disabled. This	may expose secur	ty risks. We stron	igly recomm	end to Enable	e Form Key \	alidation On Checko	out in <u>Admin / Secur</u> i	rity Section	, for protect yo	ur own checko	ut process.	
Cus	tomer Grou	ps												O Add New Cu	stomer Grou
je 🖃	1 D of 1	pages View	20 ▼ per pa	age Total 5 reco	ords found									Reset F	ilter Searcl
je 🖃	1 of 1 Group Name	pages View	20 ▼ per pa	age Total 5 rec	ords found								t	Reset F	ilter Searcl
je 🕢	1 of 1 Group Name	pages View	20 V per pa	age Total 5 reci	ords found								t	Reset F	ilter Searcl
ge I	1 of 1 Group Name General	pages View	20 V per pa	nge Total 5 reci	ords found								t	Reset F Tax Class Retail Customer	ilter Searci
ge <	1 of 1 Group Name General NOT LOGGED	pages View	20 V per pa	age Total 5 reci	ords found								ţ	Reset F Tax Class Retail Customer Not Logged-In	iter Searci
je I	1 of 1 Group Name General NOT LOGGED Private Sales M	pages View	20 V per pa	age Total 5 reci	ords found								t	Reset F Tax Class Retail Customer Not Logged-in Private Sales	itter Searcl
ge	Image: Control of a state o	pages View	20 V per pa	age Total 5 reco	ords found								t	Reset F Tax Class Retail Customer Not Logged-in Private Sales Retail Customer	itter Searci

• 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.

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.

Dynamics 365 Business Central	Sandbox	Q	Ø	?	N
CRONUS USA, Inc. Posted Documents ~					
Sales Orders Sales Invoices Sales Credit Memos Sales Return Orders Items Customers CSM Channel Order	API SET			2	
Sales Manager MAGE1B2C Imagento 1.93 Retail Consul	CODE MAGENTO1				

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Listing Management Setup

Version: 1.15



65 Business Cen	itral																	Sandbo	×Q	٥	
¢	CSM AUTOMATION LIST	WORK DATE: 4	/8/2019															√SAVED ,× [€]			
		🚯 Edit List	🗓 Delete	💶 Open in	Excel													7 ≡ 0	- 1		
	SALES CHANNEL CODE	AUTOMA TYPE	SEQUEN	CODE	CODEUNIT ID CODE	ORDER STATUS	CHANNEL STATUS VALUE	NAV ORDER STATUS	DESCRIPTION	AU CR SO	AU RE S0	AU PO SO	API SET CODE	API FUNCTION CODE	NEXT AUTOMA CODE	SC	SCHEDULED	LAST RUN TIMESTAMP			
	MAGE182C	Fulfillment	110	SHIPMENTT.	. ORDERMGT	Not Applicabl	l.	Not Applicab	Sends Shipment Information to				MAGENTO1			×	1 minute	6/21/2019 6:44 PM			
	MAGE1B2C	Fulfillment	115	SENDINVOI	ORDERMGT	Not Applica		Not Applica	Sends Invoice Information to M.				MAGENTO1				1 minute	6/21/2019 6:44 PM			
		API	210	MAGESALE	ORDERMGT	Not Applica		Not Applica	Retrieves Orders from Magento	1			MAGENTO1	SALESORDER			1 minute	6/21/2019 6:44 PM			
	MAGE1B2C	Order	1100	GETORDERL.	ORDERMGT	In Complete	processing	No Order	Get Order Lines when this statu		2		MAGENTO1	SALESORDERI.			1 minute	6/21/2019 6:44 PM			
	MAGE1B2C	Order	1105	GETORDERL.	ORDERMGT	In Complete	pending	No Order	Get Order Lines when this statu				MAGENTO1	SALESORDERI.			1 minute	6/21/2019 6:44 PM			
	MAGE1B2C	Listing	3100	AVAILABILITY	LISTINGMG	Not Applica		Not Applica.	. Sends Item Availability to Mage.	. 0			MAGENTO1					11/1/2018 12:00			
	MAGE1B2C	Listing	3105	CATEGORY	LISTINGMG	Not Applica		Not Applica	. Sends Channel Category to Ma				MAGENTO1					11/1/2018 12:00			
	MAGE1B2C	Listing	3110	ATTRIBUTES.	LISTINGMG	Not Applica		Not Applica	Sends Attribute Set (including a.	. 8			MAGENTO1					11/1/2018 12:00			
	MAGE1B2C	Listing	3115	ATTRIBUTE	LISTINGMG	Not Applica		Not Applica	. Sends Attribute information (in				MAGENTO1					11/1/2018 12:00			
	MAGE1B2C	Listing	3120	ATTRSETSY	LISTINGMG	Not Applica		Not Applica.	Performs the Attribute Set Sych				MAGENTO1					11/1/2018 12:00			
	MAGE1B2C	Listing	3125	PRODUCTLI	LISTINGMG	Not Applica		Not Applica.	Sends Product Listing Informati				MAGENTO1					11/1/2018 12:00			
		Housekeepi	999999	HOUSEKEEP.	ORDERMGT	Not Applica		Not Applica.	CSM Housekeeping and Mainte.								1 minute	6/21/2019 6:44 PM			

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.

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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

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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.

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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

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Listing Management Setup

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

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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

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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

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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.

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CSM Everyday Operations

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

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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.

Dynamics 365 Business Central	Q	Ø	?	W
CRONUS USA, Inc. Posted Documents ~				
Sales Orders Sales Invoices Sales Credit Memos Sales Return Orders Items Customers CSM Cha	annel Orders		2	
imes Want more? Start a free, 30-day trial to unlock advanced features and use your own company data. Start trial			~	_
ACTIONS Tasks > Sales > Reports Sales Channels Salights CSM Automation				
CSM API Sets CSM Sales Channel List Factbox ~				
Channel Sales	API SET CODE			
Mage182C : Magento 1.93 Retail Consu Mage182C	I MAGENT(



Viewing Channel Orders

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

ynamics 365 Business Central C									W
CRONUS USA, Inc.	Posted Documents $\!$								
Sales Orders Sales Invoice	s Sales Credit Memos	Sales Return Orders	Items	Customers	CSM Char	nnel Orders		2	
imes Want more? Start a free, 30	o-day trial to unlock advanced	I features and use your ow	n company	y data. Start t	rial			~	_
ACTIONS Tasks Sales Insights	Reports								
WELCOME									- 1
Molcomo	Walcoma to			nel List Factbo	×∽				
Channel	ales	SALES CHANNEL CODE		DESCRIPTION		API SET CODE			

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.

Dynam	ics 365 Business Central						a 🕸 ? 🚺
	CRONUS USA, Inc.	Posted Docum	ients \vee				
	CSM Channel Orders:	All ~ / Sea	rch 🕂 Ne	w 📋 Delete	🐏 Update Status 🛛	💶 Open in Excel 🛛 …	7 🗉 🛈 🖍
	ORDER ID	SALES CHANNEL CODE	CSM ORDER STATUS	CHANNEL STATUS	BUYER EMAIL		
	145000060	: MAGE1B2C	In Process	pending	dblaisdell@arc	che Sales Channel Order	Statistics
	145000050	MAGE1B2C	Error	complete	MTraxinger@a	arch Order 10	145000060
	145000049	MAGE1B2C	Error	complete	jcoffee@aol.co	om Purchase Timestamp	6/21/2019 9:15 AM
	145000059	MAGE1B2C	In Process	pending	mmarty@arch	erp Last Source Update	6/21/2019 9:15 AM
	145000048	MAGE1B2C	In Process	processing	eric.street@go	Channel Order Total	39.71
	145000058	MAGE1B2C	In Process	pending	cstreitenberge	r@ Outstanding SO Amount	39.71
	145000057	MAGE1B2C	In Process	pending	tmarshello@su	uite Total Amt. Invoiced	0.00
	145000056	MAGE1B2C	In Process	pending	ecombow@arc	Financial Event Charges che	0.00
	145000055	MAGE1B2C	Error	pending_payment	ss@ap.com	Posted Shipments	0
	145000054	MAGE1B2C	In Process	pending	gchen@suitee	ngi Customer	CSM-0000013
	145000053	MAGE1B2C	In Process	pending	nmishra@arch	lerr	
	145000052	MAGE1B2C	In Process	pending	hwang@suitee		
	145000051	MAGE1B2C	In Process	pending	asmith@yahoo	0.cc (There is nothing to	show in this view)
	145000047	MAGE1B2C	In Process	pending	hmunster@the	ера	
	145000046	MAGE1B2C	In Process	pending	sandrastreet@	str	
	145000045	MAGE1B2C	In Process	pending	belinda.newma	an@	
						Links +	

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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 rerunning the channel's automation routine. This is useful in scenarios where a missing or incorrect setup issue in a sales channel environment resulted in a large quantity of incorrect CSM channel orders within Business Central. If this occurs, the user can select all of these channel orders and delete them at once using the bulk delete functionality described here, correct the problem within the sales channel, then re-import all of the orders into Business Central.



Channel Order Card

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

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iness (Central								۵	٥	?	W
÷	CSM ORDER WORK DATE	4/8/2019	Ø	+ 🗊				2				
	MAGE1B2	С										
	Process Update Re	lated Information	Navigate	Fewer options								
	General											
	Sales Channel Code · · · ·	MAGE1B2C		Purchase Ti	nestamp ····	11/6/2	018 4:25 PM	- 1				
	Order ID	145000045		CSM Order	Status	In Proc	ess					
	Buyer Email	belinda.newman@cronu	scorp	Order Statu	5	Open		- 1				
	Buyer Name	Linda Newman		Order No.		CSM-N	1AG-0000002					
	Buyer Phone	444-555-1212		Shipment S	atus	Nothin	g Shipped					
	Channel Order Lines	Manage						E2				
	ORDER STATUS C	HANNEL ITEM NO.	CHANNEL	. ITEM DESCRIPT	ION QU	ANTITY	ITEM PRICE	ITE				
	NotShipped 7	22252110022	LUNA BA	R - Dark Chocola	te H	5.00	2.39					
	NotShipped h	dd004	Stone Salt	t and Pepper Sha	kers	1.00	65.00					
	NotShipped 1	00011112222	ArcherPoi	int Client Apprec	atio	2.00	10.00	- 1	(D		
	CSM Order Docume	nts Manage										
	ORDER DOCUME TYPE 0	RDER DOCUMENT NO.	CHANNEL	DOCUMENT	CHANNEL CREATION I	DATE	CHANNEL PAYMENT METHOD			1		
	Payment : 1		1				ccsave					
	Shipping >									I		
	Invoicing >							- 1				
	Channel Data							_				
	Channel Status Value	pending		Marketplac	ld · · · · ·	1						
	Channel Customer C	141		Channel Or	der Type	new						
	Guest Customer			Is Prime Ore	ler · · · · ·							
	Seller Order ID	1		Is Premium	Order · · · · ·							
	Fulfillment Channel			Is Business	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.

Dynamics 365 Busines	is Central		Q	Ø	?	W
(- CSM ORDER WORK DATE: 4/8/2019	+ 🛍	2			
	MAGE1B2C					
	Process Update Related Information Navigate	Fewer options				
	General					
	Sales Channel Code · · · · · MAGE1B2C	Purchase Timestamp · · · 11/6/2018 4:25 PM				
	Order ID 145000045	CSM Order Status · · · · · In Process				
	Buyer Email belinda.newman@cronuscorp	Order Status				
	Buyer Name · · · · · · Linda Newman	Order No. CSM-MAG-0000002				
	Buyer Phone 444-555-1212	Shipment Status · · · · · Nothing Shipped				

- **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 FastTab Section on the Channel Order are Channel Order Lines.

Channel Order Lines Manage									7 E
	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 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.

Order Documents FastTab

The Next FastTab Section on the Channel Order are Channel Order Documents.

CSM Order Documents Manage								
ORDER DOCUME TYPE	ORDER DOCUMENT NO.	CHANNEL DOCUMENT NO	CHANNEL CREATION DATE	CHANNEL PAYMENT METHOD	AMOUNT	SECONDARY AMOUNT	CHANN DOCUM TYPE	
Payment	1	1		ccsave	110.10	13.15		

Channel Order Documents show related information to the Order. In the above screenshot, we see the payment information that was received from Magento. The Channel Payment Method from Magento is used when building the Sales Order to set Payment Method. CSM looks in at the Sales Channels Payment Methods to determine the correct value. If the value is not found in the Sales Channel Payment Method table, the Business Central Order Creation will cause an error status to occur on the Channel Order.

As this order is processed, Business Central Posted Shipments and Invoices will be added as they are posted.



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Shipping FastTab

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

Shipping			- Chm	
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			Ship To Name	Belinda Newman
Number of Items Shipped	0.0	00	Ship To Address 1	140 Cronus Corp Drive
Number of Items Unshipped	0.0	00	Ship To Address 2	
Earliest Ship Date			Ship To Address 3	
Latest Ship Date			Ship To City	South Bend
Earliest Delivery Date			Ship To State	Indiana
Latest Delivery Date			Ship To Postal Code	39392
CBA Displayable Ship Label			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.

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Invoicing FastTab

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

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

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

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

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

Channel Data FastTab

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

Channel Data

Channel Status Value · · · · · · pending	MarketplaceId · · · · · · · 1
Channel Customer Code · · · · · · · 141	Channel Order Type ••••••• new
Guest Customer	Is Prime Order
Seller Order ID · · · · · · · · 1	Is Premium Order
Fulfillment Channel	Is Business Order
Channel Sales Identifier · · · · · · 1	Purchase Order Number
Order Channel ArcherPoint CSM MAGE Demo ArcherPoint	

Channel Status Value – The status of the Order as received from Magento.

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- 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.
- Channel Sales Identifier This is the Magento Store ID, CSM uses this to determine which CSM Sales Channel the order belongs to. It should match an API Channel Identifier on a CSM Sales Channel.
- Order Channel A text version of the Website and Store that the Magento Order occurred in.
- Marketplace ID This contains the Magento Website ID that the order was placed on.

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

Information

Purchase Timestamp	11/6/2018 4:25 PM	Imported Time	8:44:12 PM
Payment Timestamp	11/6/2018 4:25 PM	Acknowledgement Required	
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 Externa



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.

Dynamics 36	55 Business Central				Q	Ô	?	W
÷	CSM ORDER WORK DATE: 4/8/2019 MAGE1B2C			+ 🗉	√ SAVED	^م		
	Process Update Related Info	rmation <u>Navigate</u> Fewer option	ons	Order Level Discount Code		다		
 Create Sales Order Show Document Update Status 	140 Cronus Corp Drive		Order Level Discount Amount	0.00	2		l	
	Bill To City Bill To State	South Bend Indiana		Other Charges Sales Tax	0.00 110.10			

- 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.

MAGE1B2	С								
Listing Ordering AP	ls Actions Navigate	Fewer options							
General >									
Order Management >									
Customers									
Customer Template	CSMTEMPLATE	Auto Create Contact							
New Customer Behavi	Auto Create	Default Customer Gro							
Guest Customer Beha	Auto Create	New Customer No. Se CSM-CUST							

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

MAGE1B2C					
Listing Ordering APIs	Actions	Navigate	Fewer options		
Sales Channel Customers	² Add Char	nel Custome	r		-0-
Order Management >					_
Customers					
Customer Template · · · · · CSM	1TEMPLATE		Auto Create Contact		
New Customer Behavi Auto	lew Customer Behavi Auto Create				
Guest Customer Beha Auto Create			New Customer No. Se	CSM-CUST	
Listing Management >					

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← ←	CSM CUSTOMERS WOR	K DATE: 4/8/2019							√ SAVED	× .
		🐯 Edit List 📋 Delete 🛽	Open in Excel More	options					Ŷ	=
	SALES CHANNEL CODE 🖤	CHANNEL USER CODE	CHANNEL FIRST NAME	CHANNEL LAST NAME	INITIAL CHANNEL PASSWORD	GU CH	CUSTOMER NO.	CONTACT NO.	EXTERNAL ID]
	MAGE1B2C	asmith@yahoo.com	Alex	Smith		۲	CSM-0000005	CT000033		
	MAGE1B2C	belinda.newman@cronuscorp.n	. Linda	Newman			CSM-0000002	CT000027	141	
	MAGE1B2C	cstreitenberger@archerpoint.c	Cindy	Streitenberger			CSM-0000011	CT000045		
	MAGE1B2C	dblaisdell@archerpoint.com	Denise	Blaisdell			CSM-0000013	CT000049		
	MAGE1B2C	ecombow@archerpoint.com	Elly	Combow			CSM-0000009	CT000041		
	MAGE1B2C	eric.street@google.net	Eric	Street			CSM-0000001	CT000025	142	
	MAGE1B2C	gchen@suiteengine.com	Gary	Chen			CSM-0000008	CT000039		
	MAGE1B2C	hmunster@theparlor.com	Herman	Munster			CSM-0000004	CT000031		
	MAGE1B2C	hwang@suiteengine.com	Heather	Wang			CSM-0000006	CT000035	143	
	MAGE1B2C	mmarty@archerpoint.com	Marty	McMarty			CSM-0000012	CT000047		
	MAGE1B2C	nmishra@archerpoint.com	Nilesh	Mishra			CSM-0000007	CT000037	144	
	MAGE1B2C	sandrastreet@streetco.com	Sandra	Street			CSM-0000003	CT000029	140	
	MAGE1B2C	tmarshello@suiteengine.com	Tom	Marshello			CSM-0000010	CT000043	145	

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

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

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

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

You can also create Customers on Magento from Business Central Customers and Contacts. To do this you would add a Sales Channel Customer record and choose the appropriate Business Central Customer and Contact. 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.) Then use the **Send To Channel** – Channel Integration Action. This will send the Customer information to Magento, and Magento will return the External ID it used to Create the customer. Note, that you can have many Channel User Codes pointing at the Same Business Central Customer.



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 assembles all the information needed to send to Magento.

MAGE	1B2C															
Process Updat	te Related Information	Navigate	Fewer options													
General	\sim															
Sales Channel Coc	de · · · · · · MAGE1B2	c		/ Buyer Ph	one · · · · ·	[444-555-1	1212			Order N	0		CSM-MAG-0	000002	
Order ID	14500004	5		Purchase	e Timestamp		11/6/2018	3 4:25 PM			Shipmer	nt Status	p	ull Single Sh	ipment	
Buyer Email	belinda.ne	wman@cronusco	orp.net	CSM Ord	der Status		In Process									
Buyer Name	Linda Nev	vman		Order St	atus · · · · · ·		Open									
Channel Order	Lines Manage															
ORDER	CHANNEL ITEM NO.	CHANNEL I	TEM DESCRIPTION	QUANTITY	ITEM PRI	EXTER CE ITEM F	NDED	ITEM TAX	SHIPPING PRICE	SHIP	PING TAX	GIFT WRAP PRICE	GIFT WRAP TAX	GIFT WRA	P TYPE	GIFT WRAP MES
Shipped	722252110022	LUNA BAR -	Dark Chocolate Ha	5.00	2	39	11.95	0.00	0.00		0.00	0.00	0.00			
Shipped	hdd004	Stone Salt ar	nd Pepper Shakers	1.00	65.	00	65.00	0.00	0.00		0.00	0.00	0.00			
Shipped	100011112222	ArcherPoint	Client Appreciation	2.00	10.	00	20.00	0.00	0.00		0.00	0.00	0.00			
CSM Order Doc	cuments Manage															
ORDER DOCUME TYPE	ORDER DOCUMENT NO.	CHANNEL DOCUME NO	CHANNEL PAYMENT METHOD	AMOUNT	SECONDARY AMOUNT	EXTERNAL ID)	LAS	ST EXTERNAL UPDA	TE	SHIPME	NT CO 8 SHI	SHIPMENT TRA TITLE	ACKING	SHIPMENT TR NUMBER	ACKING
Payment	1	1	ccsave	110.10	13.15	1										
Shipment	S-SHPT102215			0.00	0.00	100000057		Suc	essful Shipment an	d Tracki	ups	ø	UPS Tracking N	lumber	TestTrackingN	o-111111
Invoice	PS-INV103215		ccsave	110.10	0.00	103000032		Suc	essful Shipment Se	nt to Ch						
											ī					

Next, CSM will send the information to Magento, and if successful, set the External ID that Magento 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.

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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 assembles all the information needed to send to Magento.

MAGE	1B2C															
Process Upd	ate Related Inform	mation Na	ivigate F	ewer options												
General																
Sales Channel Cr	ode · · · · · · · · · · ·	MAGE1B2C		~	Buyer F	hone · · · · ·		444-555-1212				0		CSM-MAG-0000002		
Order ID		145000045			Purcha	e Timestamp		/6/2018 4:25 PM			Shipmer	nt Status		Full Single Sh	ipment	
Buyer Email · · ·		belinda.newman	@cronuscor	p.net	CSM O	rder Status	In I	Process								
Buyer Name \cdots		Linda Newman			Order 9	itatus	Ор	en								
Channel Orde	r Lines Mana	age														
ORDER STATUS	CHANNEL IT	EM NO. C	HANNEL ITE	EM DESCRIPTION	QUANTIT	Y ITEM PRI	EXTENDE CE ITEM PRIC	ED CE ITEM TA	SHIPPING X PRICE	SHIP	PING TAX	GIFT WRAP PRICE	GIFT WRAP TAX	GIFT WRAF	P TYPE	GIFT WRAP MES
Shipped	72225211002	2 LU	JNA BAR - D	Dark Chocolate Ha	5.0	0 2	.39 11.	95 0.0	0.00		0.00	0.00	0.00			
Shipped	hdd004 10001111222	2 Ar	one Salt and rcherPoint C	d Pepper Shakers	1.0	0 65	00 65.	00 0.0	0 0.00		0.00	0.00	0.00			
CSM Order Do	ocuments M	lanage														62
ORDER DOCUME TYPE	ORDER DOCU	C D JMENT NO. N	HANNEL OCUME	CHANNEL PAYMENT METHOD	AMOUNT	SECONDARY AMOUNT	EXTERNAL ID	-	AST EXTERNAL UPD RESULT	DATE	SHIPMEN	NT CO SHI	SHIPMENT TR TITLE	RACKING	SHIPMENT TRA	CKING
Payment	: 1	1		ccsave	110.10	13.15	1									
Shipment	S-SHPT10221	5		ccsave	0.00	0.00	100000057	S	uccessful Shipment a uccessful Shipment S	and Tracki Sent to Ch	. ups	2	UPS Tracking	Number	TestTrackingNo	-111111
						0.00					-					

Next, CSM will send the information to Magento, and if successful, set the External ID that Magento 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.

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

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Channel Order Archiving

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

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



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

Last Source Update	Relation to Work Date	Archive?
03/27/2021	Future	No
03/26/2021	Current Day	No
02/25/202103/25/2021	Less Than 30 Days	No
02/24/2021	Equals 30 Days	Yes
02/23/2021	Greater Than 30 Days	Yes

Viewing Archived CSM Channel Orders

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

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

CSM Additional Details

CSM API Data

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

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

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

Field	Description	Example Value
Code	This is unique code that identifies the API set. It can be any value you wish, but we recommend naming it something meaningful that describes the external source the API set communicates with. Our example value tells us that we are communicating with a Magento 1.xx external system.	MAGENTO_M1
Description	This is a text description of the API set. It can be any value you wish, but we recommend using a meaningful description. Note, that you may deal with other channels in the future (Magento, Magento 2.xx, Amazon, etc.) and may even require a 2 nd API set for an additional Magento 1.x instance you may deploy.	Magento version 1.96 Soap V2 API
API Set Behavior	This tells us which channel we are dealing with, for Magento 1.x hosts, you should choose Magento from the dropdown.	Magento
Session API Function Code	This indicates the API Function used to maintain session management with the Channel. For Magento 1.x hosts, you should always enter LOGIN to this field.	LOGIN
Session Timeout	This is a duration value that determines when a session should be refreshed. In our example, we have specified 5 minutes. This means that when communication is	5 minutes

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	attempted with the channel, if the session is more than 5 minutes old, CSM will start a new session with the channel (Magento).	
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.m ycompany.com/api/v 2_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
АРІ Кеу	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

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