



# 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.

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

## Contents

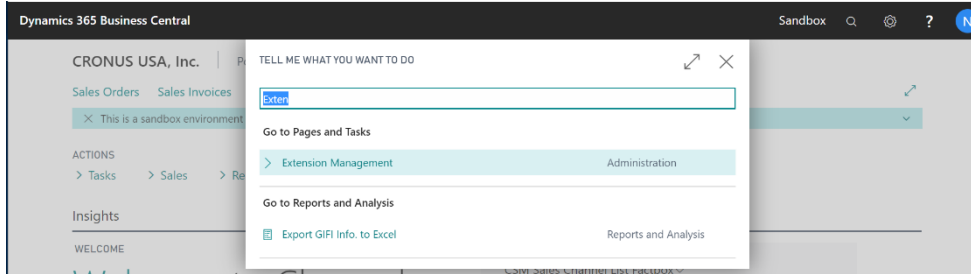
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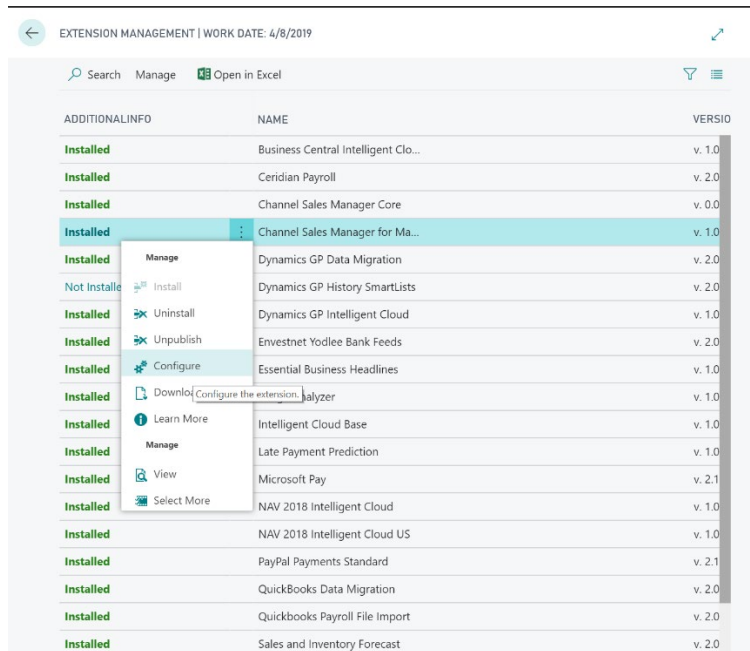
## CSM Initial Setup

### Manage the Magento for CSM Extension

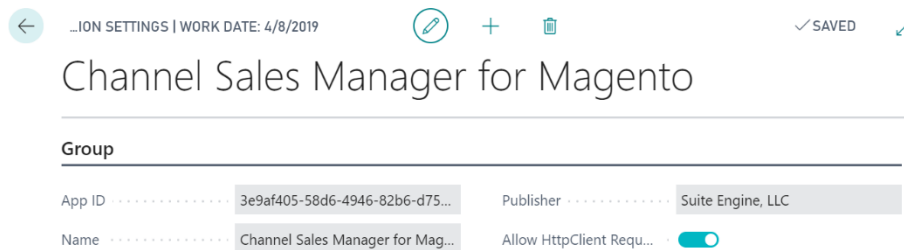
CSM requires a setting to allow it to initiate communication to Magento. This setting is in the Business Central Extension Manager. Press the gear in the upper right to search for a page to navigate to.



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.



Ensure that the “Allow HttpClient Requests” switch is on.

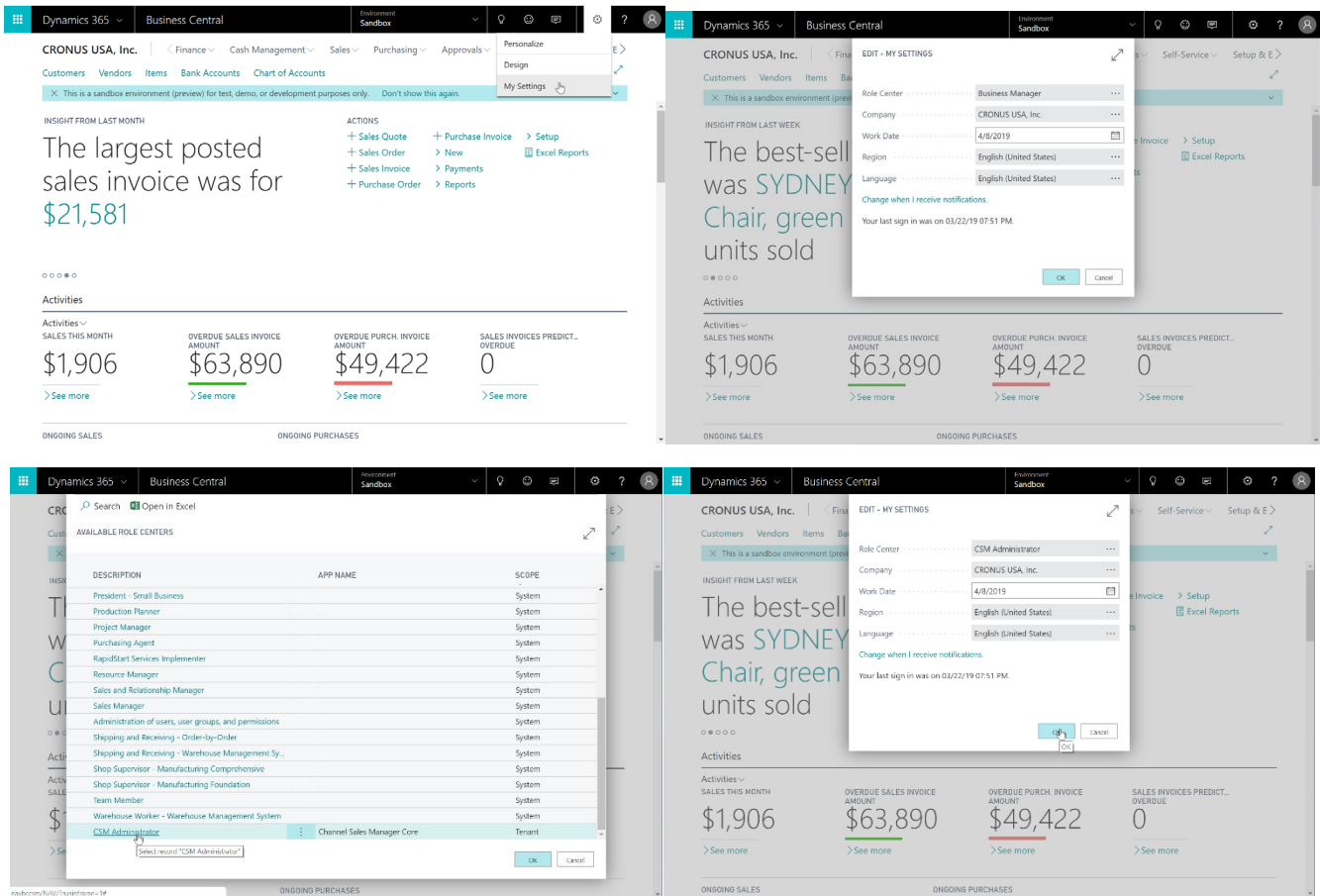


## CSM Role Center

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

To enable the CSM Administrator Role Center:

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



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

## CSM Setup

To initially setup CSM for 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.

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.' in a 'Sandbox' environment. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Environment Sandbox'. Below the navigation bar, there are tabs for 'Sales Orders', 'Sales Invoices', 'Sales Credit Memos', 'Sales Return Orders', 'Items', 'Customers', and 'CSM Channel Orders'. A notification bar indicates 'This is a sandbox environment (preview) for test, demo, or development purposes only.' The 'ACTIONS' section shows 'Tasks', 'Sales', and 'Reports'. The 'Insights' section is highlighted with a red box and contains the text: 'NEW TO CSM', 'New to CSM? Click here to start using Channel Sales Manager.', and a small 'o •' icon. To the right of the Insights pane is a 'CSM Sales Channel List Factbox' with a table header: 'SALES CHANNEL CODE', 'DESCRIPTION', and 'API SET CODE'. The table body is empty, with the message '(There is nothing to show in this view)'. Below the Insights pane, the 'Activities' section shows 'ACTIONABLE CHANNEL ORDERS' with five cards: 'NEW' (0), 'CHANGED' (0), 'ORDERS WITH ERRORS' (0), 'CANCELLED' (0), and 'CHANNEL OR... FULFILLMENT' (0). At the bottom left, there is a 'Back to top' link.

## 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)

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



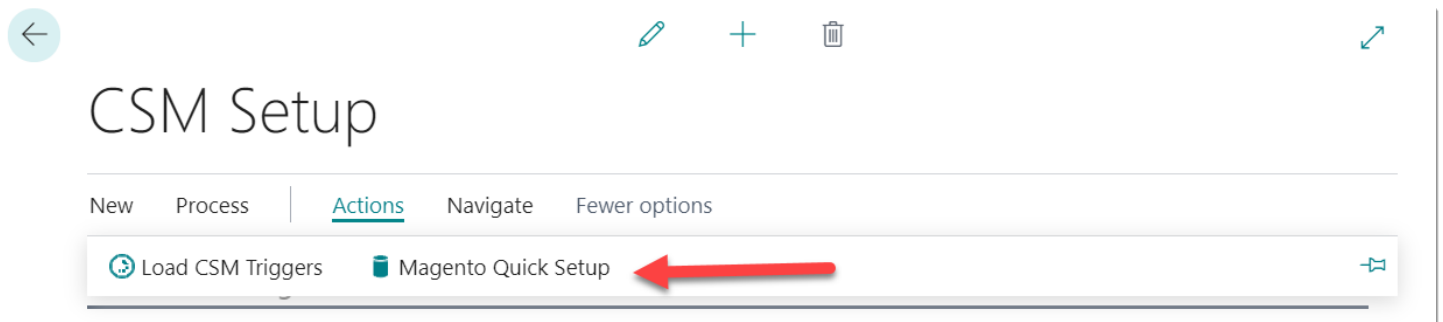
the ribbon. This will open a separate window containing the existing customer values, which can then be edited. Changes that are made to a customer’s information will be automatically synchronized with the related CSM subscription account in Stripe.

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

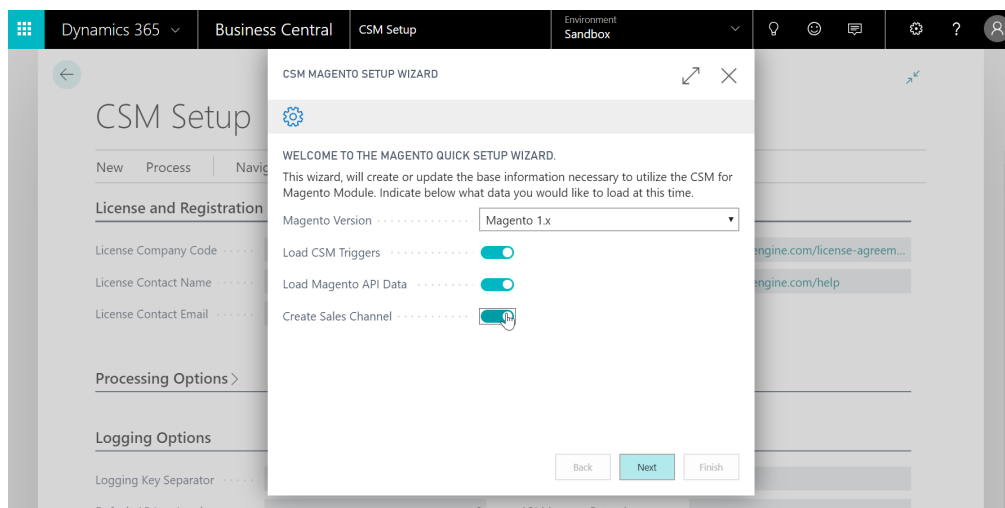
Once you have set up a trial subscription, you are ready to set up your CSM for Magento solution. While it is possible to manually enter the initial setup values, CSM for Magento comes with a setup wizard that streamlines this process; it is recommended that you use this setup wizard to create your sales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

Select Actions -> Magento Quick Setup.

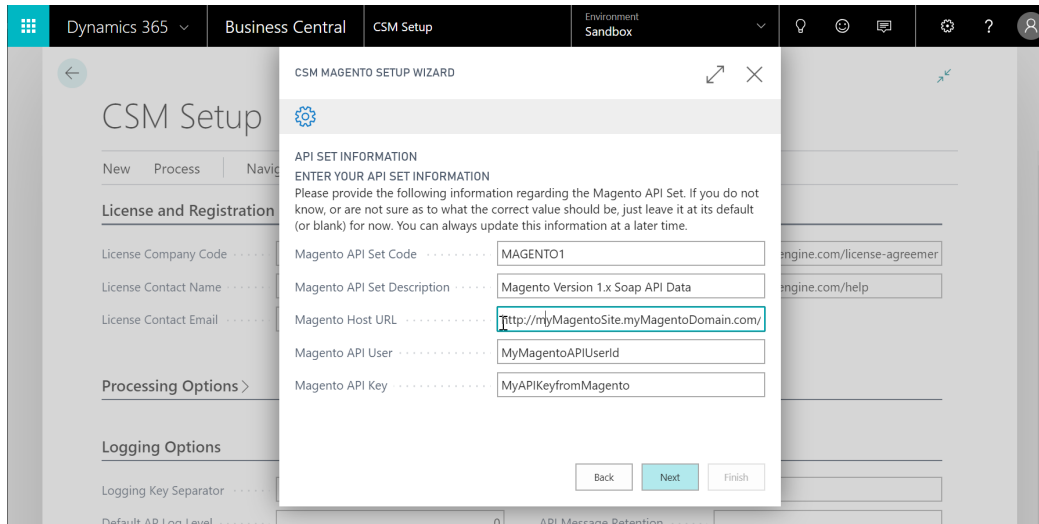


This will start the Magento Setup Wizard.

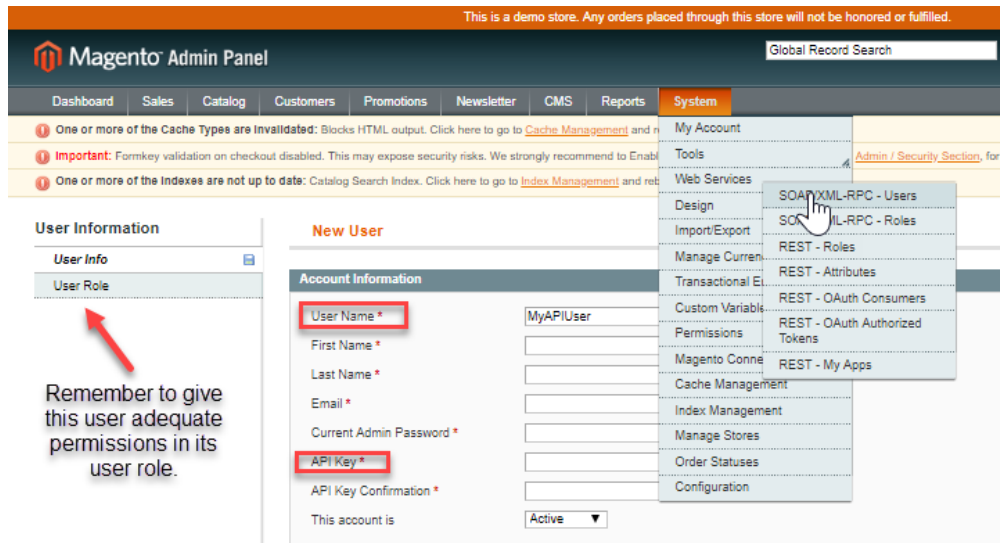
On the first page of the wizard, select your version of Magento, and turn on the last three switches.



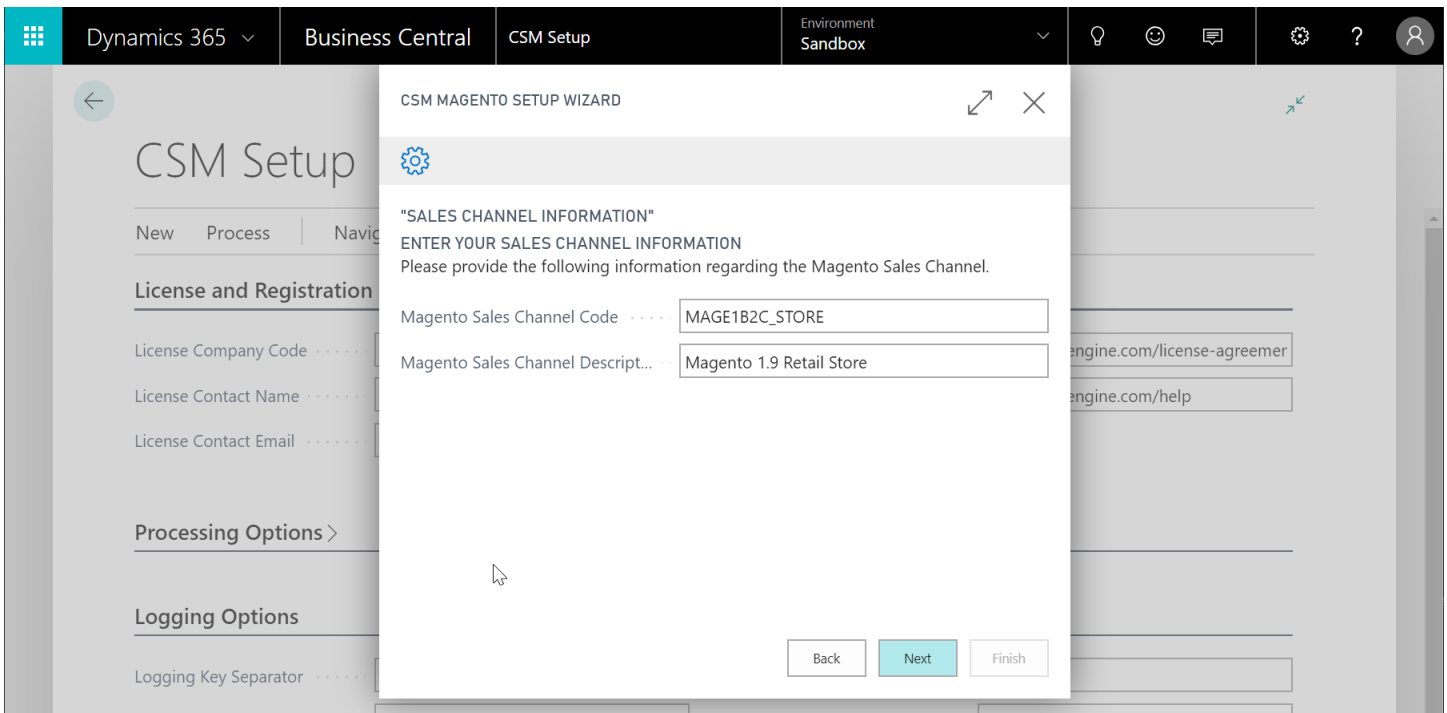
For the second page of the wizard, enter information relating to your Magento server.



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 <sup>nd</sup> 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://mymagento.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
API Key	This is the Magento Soap/xml-RPC users API Key which CSM authenticates API Calls with. See below example Magento screen shot.	Use the api key you defined on Magento for the User ID

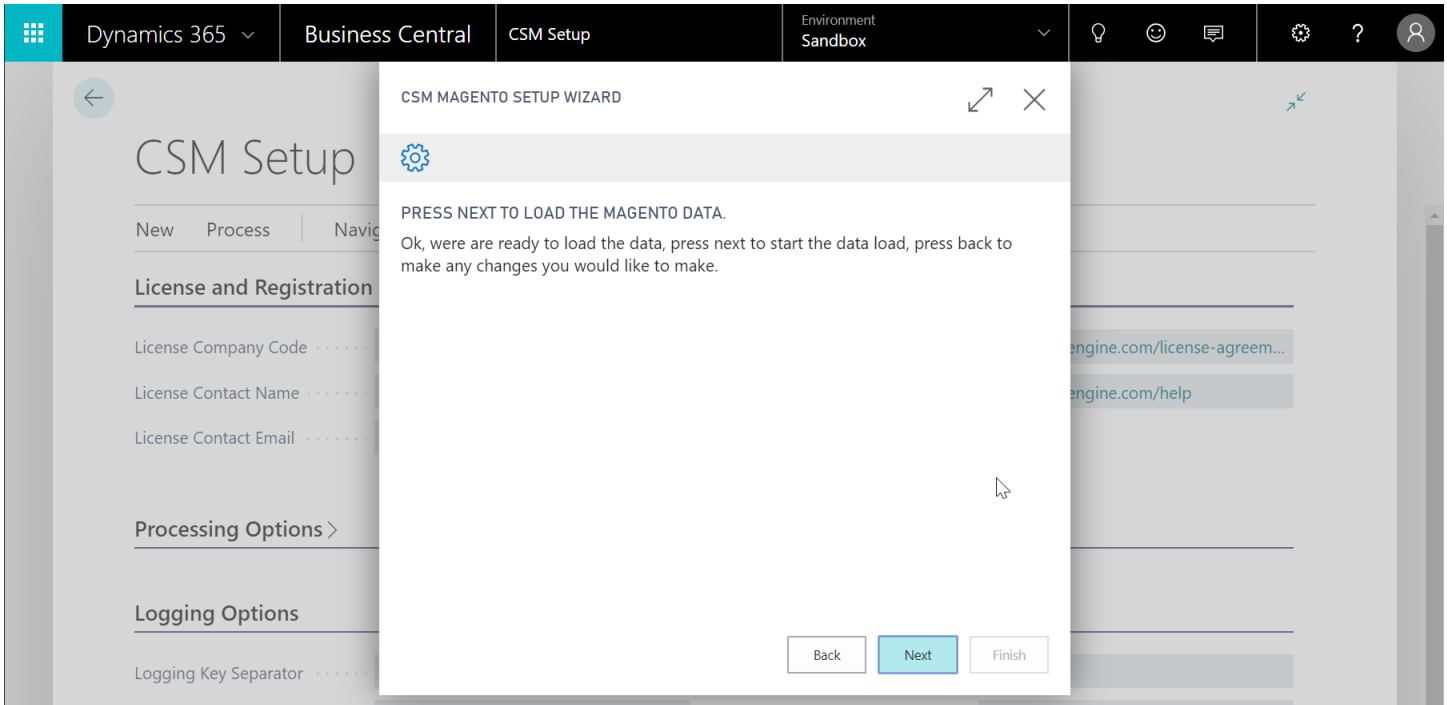


On the third page of the wizard, enter information relating to your Magento Sales Channel (Store).



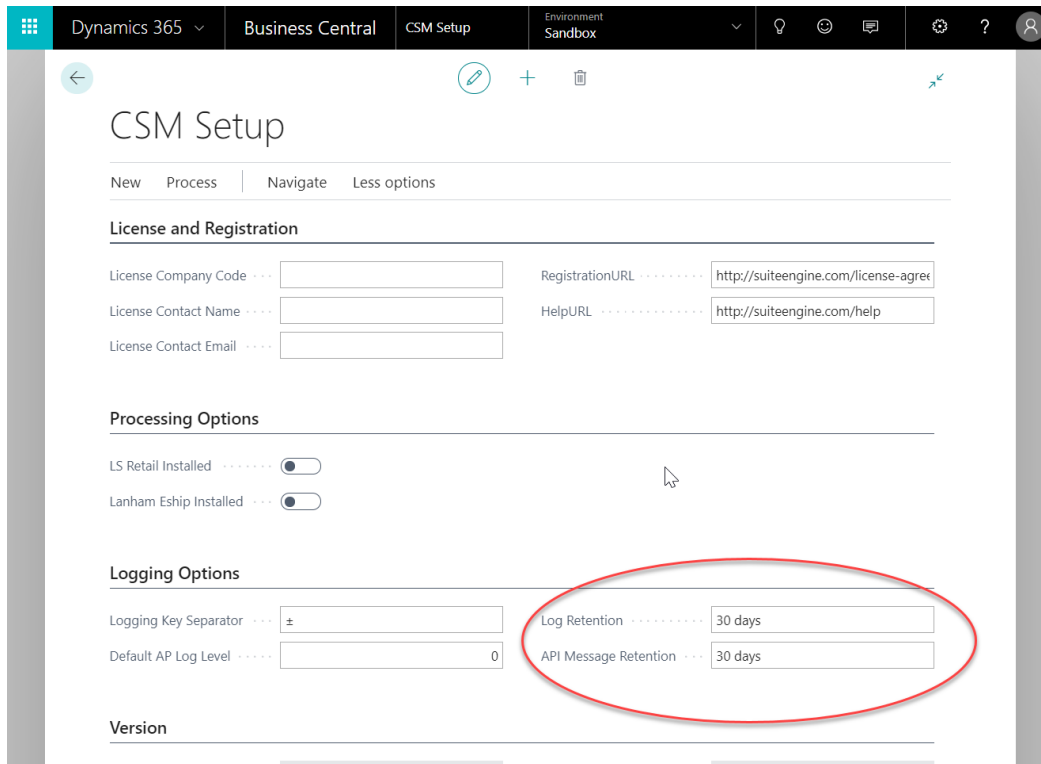
Code	This is unique code that identifies the Sales Channel. It can be any value you wish, but we recommend naming it something meaningful that describes the Sales Channel.	MAGENTO_B2C
Description	This is a text description of the Sales Channel.	Magento Retail Store (B2C)

The fourth page of the wizard is a confirmation page. 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.



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

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



**CSM Setup**

New Process | Navigate Less options

**License and Registration**

License Company Code  RegistrationURL

License Contact Name  HelpURL

License Contact Email

**Processing Options**

LS Retail Installed

Lanham Eship Installed

**Logging Options**

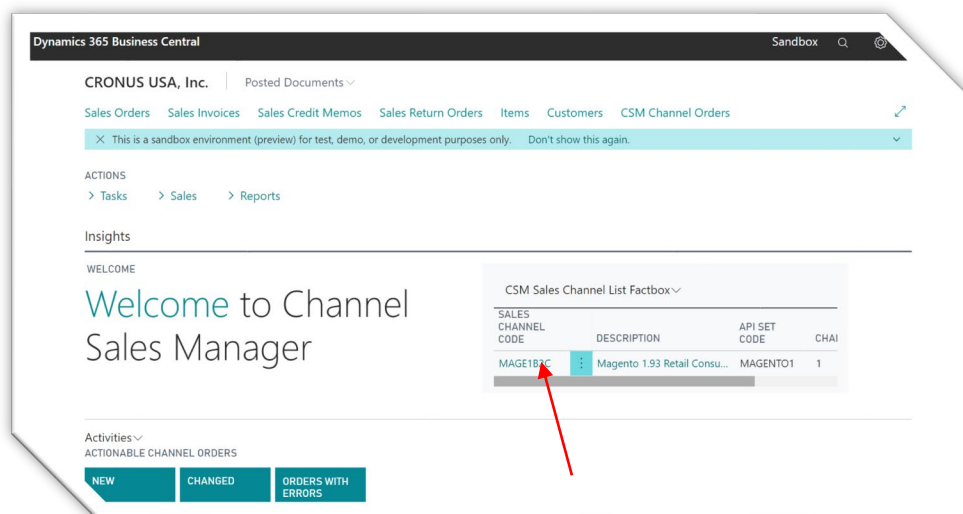
Logging Key Separator  Log Retention

Default AP Log Level  API Message Retention

**Version**

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.



**CRONUS USA, Inc.** | Posted Documents

Sales Orders Sales Invoices Sales Credit Memos Sales Return Orders Items Customers CSM Channel Orders

× This is a sandbox environment (preview) for test, demo, or development purposes only. Don't show this again.

**ACTIONS**

> Tasks > Sales > Reports

**Insights**

WELCOME

Welcome to Channel Sales Manager

**CSM Sales Channel List Factbox**

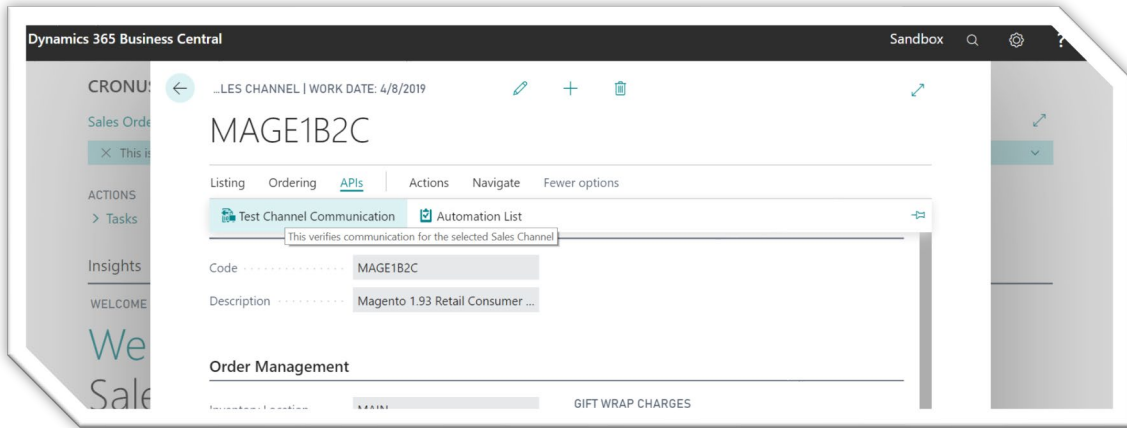
SALES CHANNEL CODE	DESCRIPTION	API SET CODE	CHAI
MAGENTO1	Magento 1.93 Retail Consu...	MAGENTO1	1

**Activities**

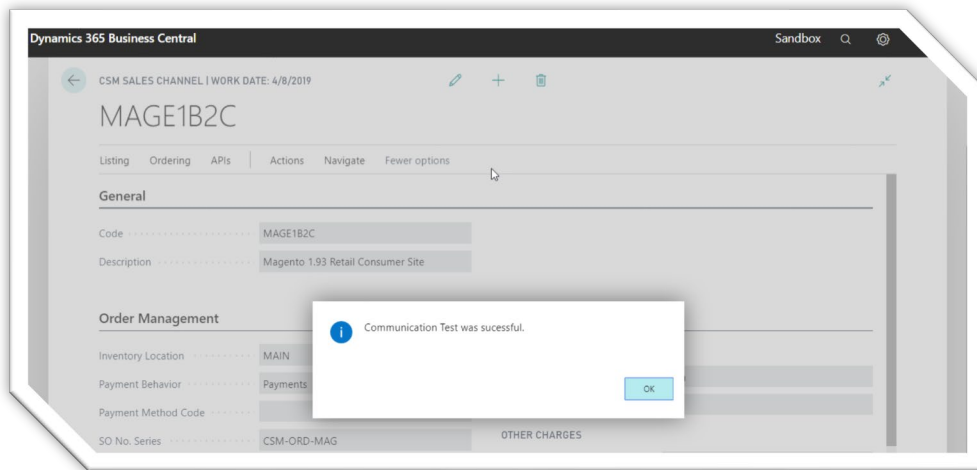
ACTIONABLE CHANNEL ORDERS

NEW CHANGED ORDERS WITH ERRORS

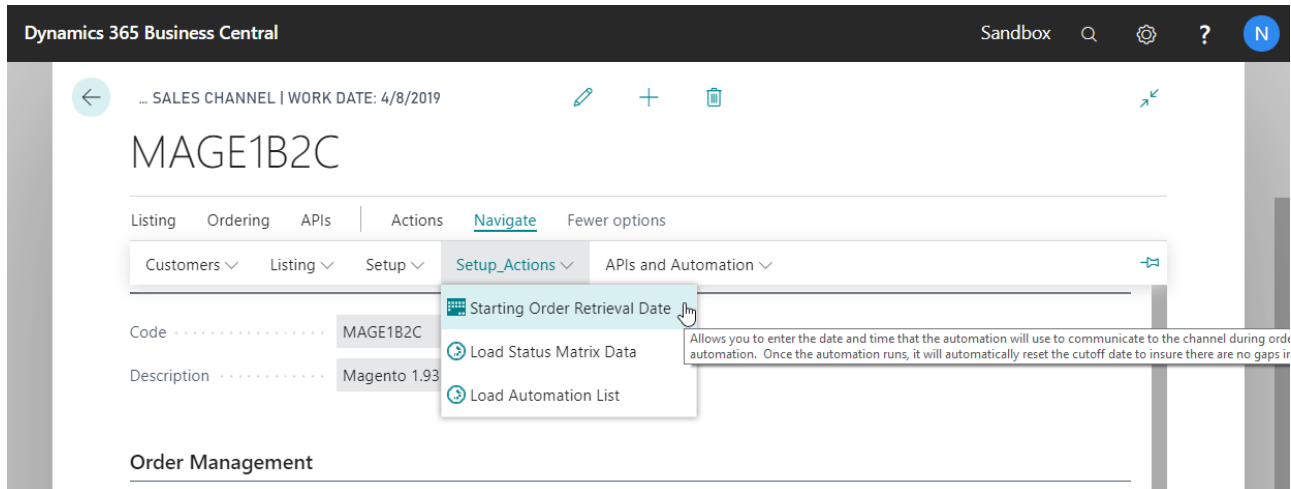
Next, select API's, then Test Channel Communication.



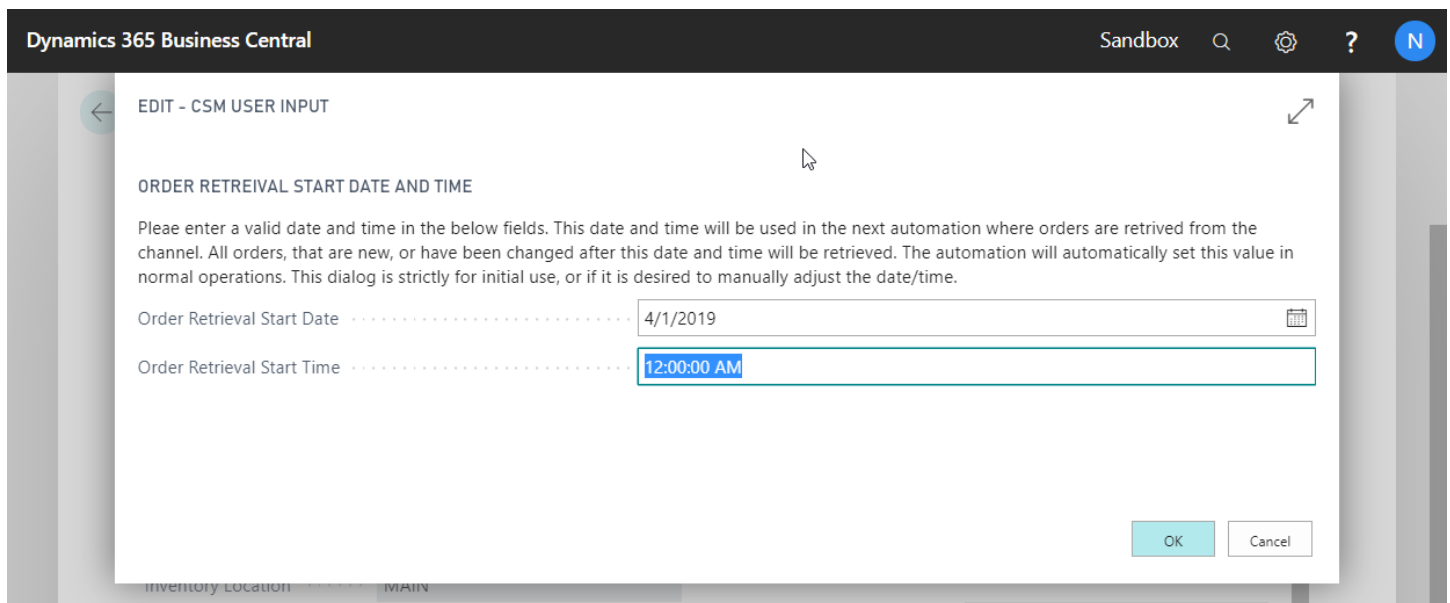
If successful, a dialog showing the Magento Edition and Version should display.



Next, you will want to set the time and date starting point for order retrieval. The date you enter, will cause CSM to ask Magento for all order information that has been added, or has changed since the time and date you enter. After that point, CSM will automatically update this time and date to ensure that there are no gaps in the communication. To Set the starting Order Retrieval Start time and date:



The Starting Date and Time dialog will then appear.



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

## CSM Functional Settings and Cross References

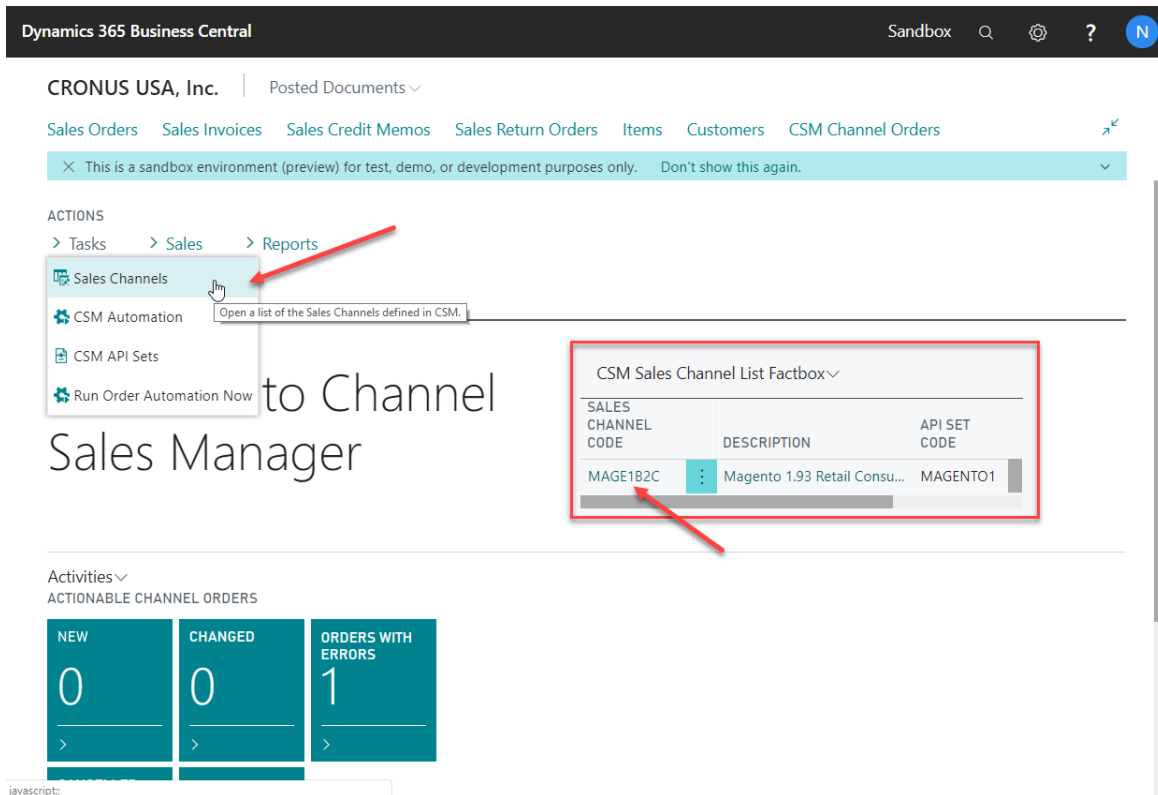
This section will go thru the settings that will customize your CSM experience and cross-reference your data in Business Central to like data in Magento, such as shipping methods, payment types, and customer price groups.

### CSM Sales Channel

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

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

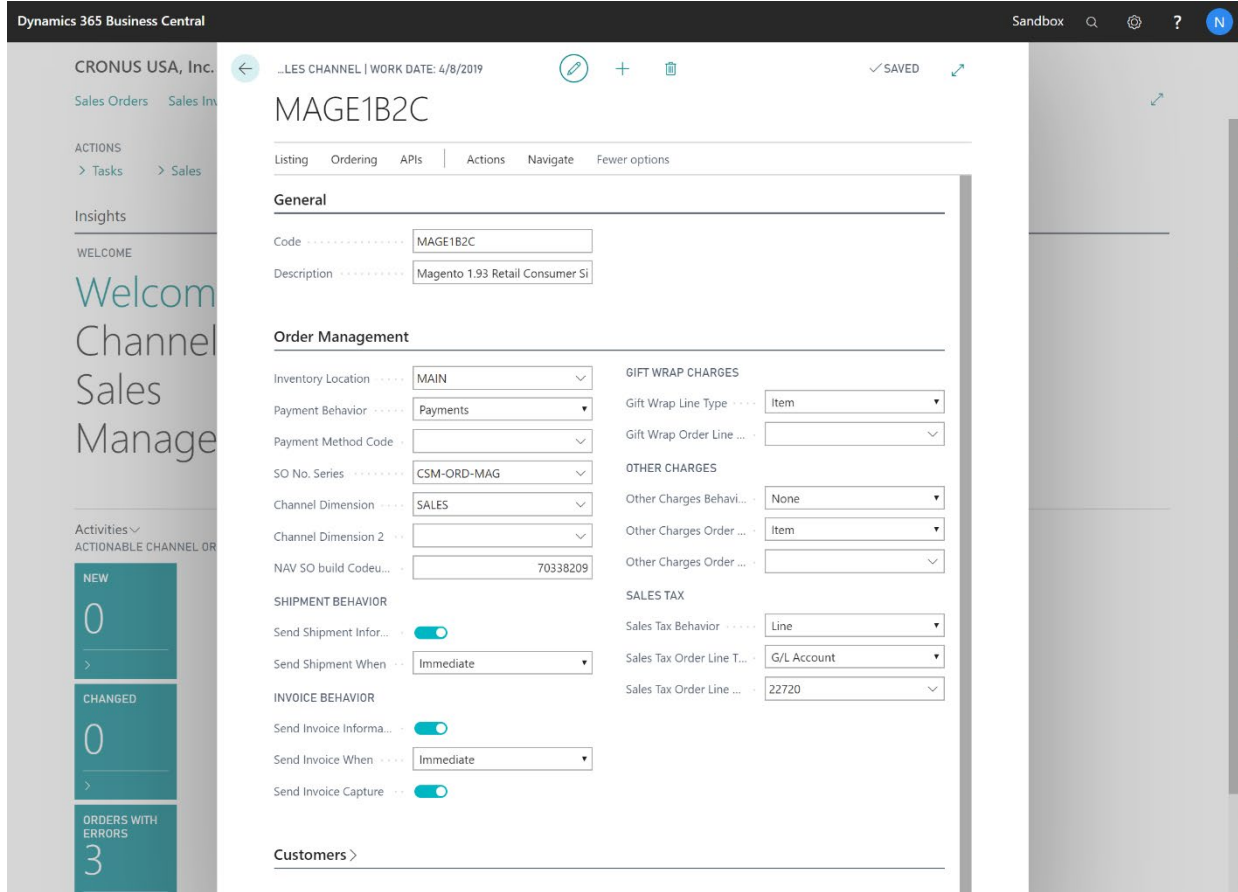
You can open the Sales Channel Card, directly from the CSM Sales Channel List FactBox box, or see a list of all CSM Sales Channels from the Actions > Tasks menu.



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



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



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

<b>Payment Behavior</b>	Indicates how this sales channel processes payments. <b>For Magento 1.x Sales Channels, this should be set to Payments.</b> Amazon Sales Channel will use Channel since all Amazon Orders pay the merchant the same way.	Payments
<b>Payment Method Code</b>	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
<b>SO No. Series</b>	The No. Series that should be used for Sales Order Number when building BC Sales Orders for this Sales Channel.	CSM-ORD-MAG
<b>Channel Dimension</b>	If populated, this BC Financial Dimension will be set on all BC Sales Orders created from this Sales Channel. Primary Dimension 1.	SALES
<b>Channel Dimension 2</b>	If populated, this BC Financial Dimension will be set on all BC Sales Orders created from this Sales Channel. Primary Dimension 2.	
<b>SO No. Series</b>	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
<b>Send Shipment Information</b>	Indicates whether CSM should send shipment information to the Channel.	Yes
<b>Send Shipment When</b>	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
<b>Send Invoice Information</b>	Indicates whether CSM should send invoice information to the Channel.	Yes
<b>Send Invoice When</b>	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
<b>Send Invoice Capture</b>	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
<b>Gift Wrap Behavior</b>	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.	

<b>Gift Wrap Line Type</b>	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).	
<b>Gift Wrap Order Line No.</b>	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).	
<b>Other Charges Behavior</b>	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
<b>Other Charges Line Type</b>	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
<b>Other Charges Order Line No.</b>	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
<b>Sales Tax Behavior</b>	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
<b>Sales Tax Line Type</b>	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
<b>Sales Tax Order Line No.</b>	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

Dynamics 365 Business Central | Sandbox | ...LES CHANNEL | WORK DATE: 4/8/2019 | MAGE1B2C | ✓ SAVED

Listing Ordering APIs | Actions Navigate Fewer options

### General

Code: MAGE1B2C  
 Description: Magento 1.93 Retail Consumer Sit

### Order Management >

### Customers

Customer Template: CSMTTEMPLATE | Auto Create NAV Con...:   
 New Customer Behavi...: Auto Create | Default Customer Gro...:  
 Guest Customer Beha...: Auto Create | New Customer No. Se...: CSM-CUST

### Listing Management >

### API Data

AP Logging Level: 0 | Website ID: 1  
 Import Object Name: | API Set Code: MAGENTO1  
 API Channel Identifier: 1

## 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.	CSMTTEMPLATE
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

	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.	
<b>Guest Customer Behavior</b>	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
<b>Auto Create BC Contact</b>	Indicates whether CSM will also automatically create a BC contact for any new customers CSM creates.	Yes
<b>Default Customer Group ID.</b>	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
<b>New Customer No. Series</b>	Indicates which No. Series should be used when CSM automatically creates a new BC customer.	CSM-CUST

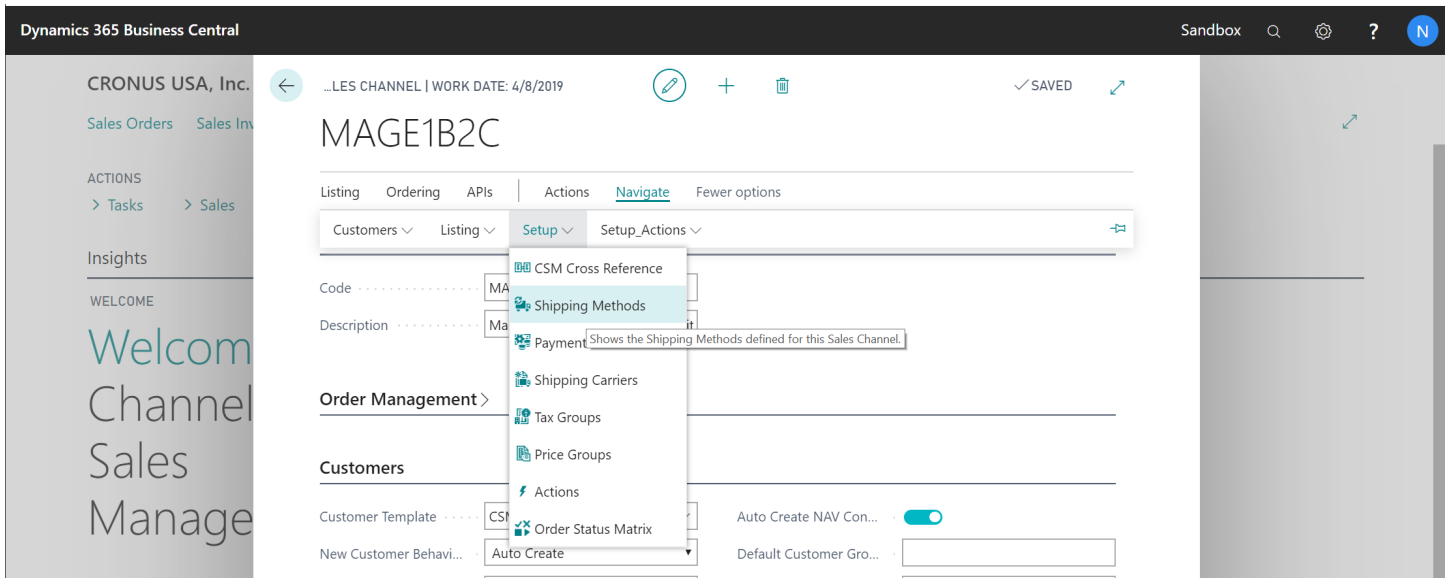
## API Data FastTab

Field	Description	Example Value
<b>API Channel Identifier</b>	For Magento, this will be the Magento ID of the Store.	1
<b>Website ID</b>	For Magento, this will be the Magento ID of the Website.	1
<b>API Set Code</b>	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

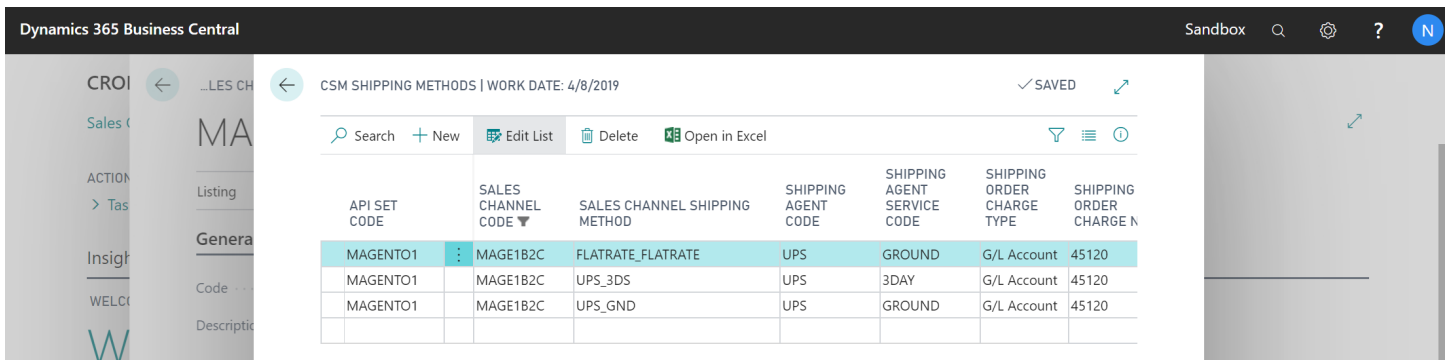
## CSM Shipping Methods

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.



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.

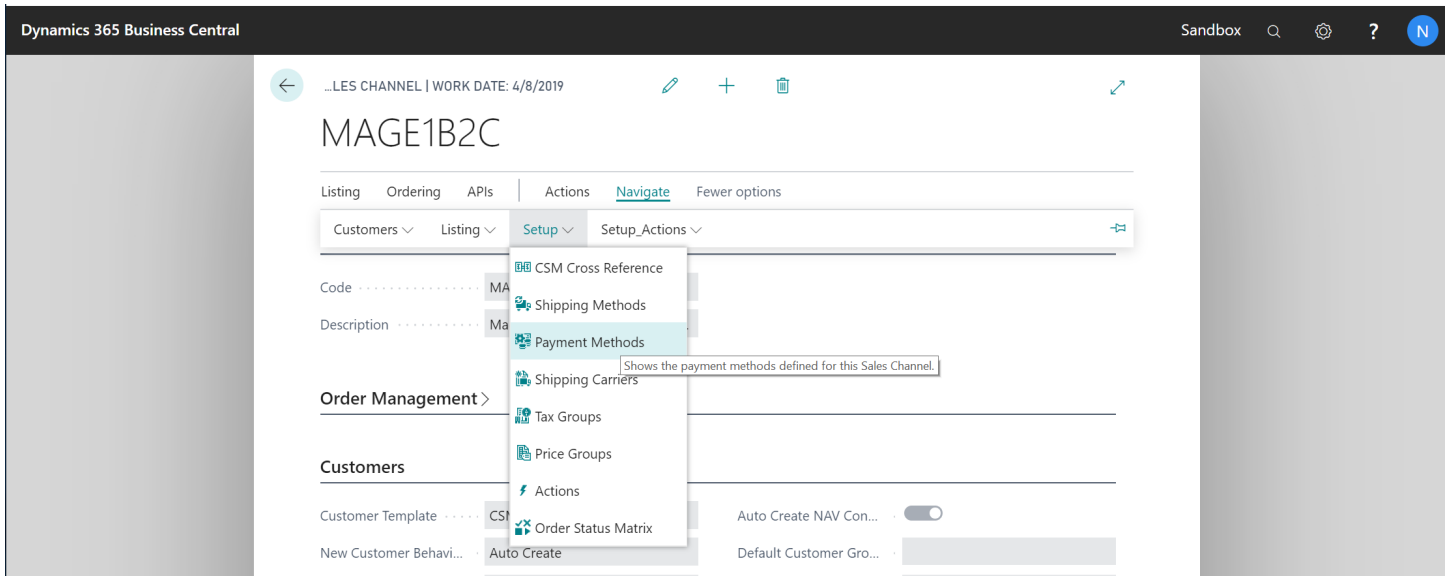


The Magento Shipping Method Code can be found on Magento by looking in the `mage_core_config_data` table and filtering the config path to carriers.

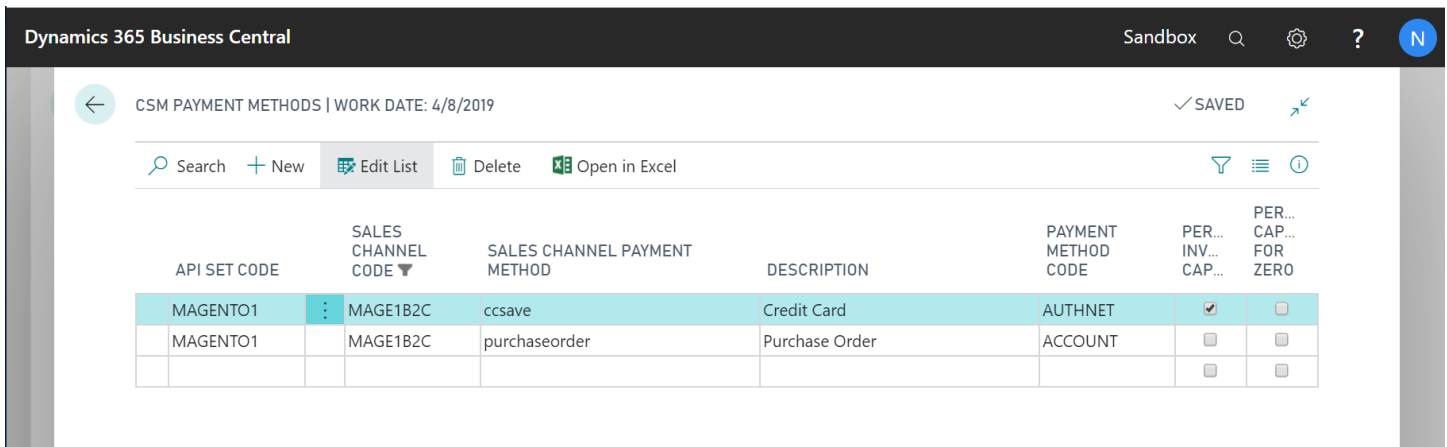
## CSM Payment Methods

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.



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.



API SET CODE	SALES CHANNEL CODE	SALES CHANNEL PAYMENT METHOD	DESCRIPTION	PAYMENT METHOD CODE	PER... CAP... INV... FOR... ZERO	PER... CAP... FOR... ZERO
MAGENTO1	MAGE1B2C	ccsave	Credit Card	AUTHNET	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MAGENTO1	MAGE1B2C	purchaseorder	Purchase Order	ACCOUNT	<input type="checkbox"/>	<input type="checkbox"/>

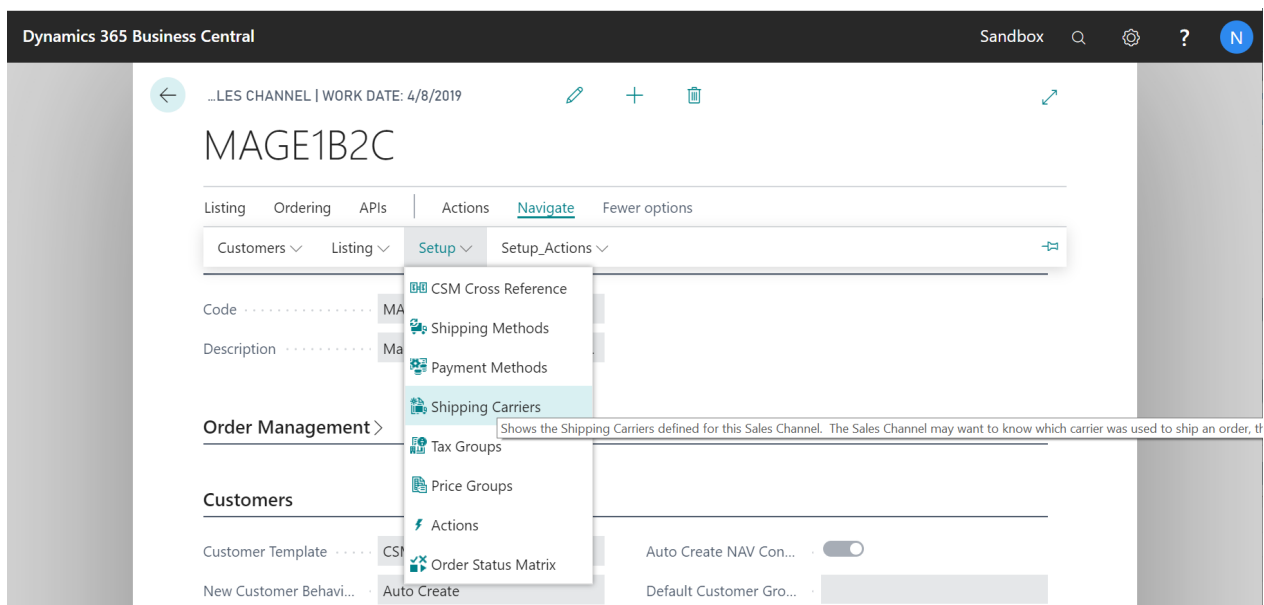


The Magento Payment Method Code can be found by looking in the `mage_core_config_data` table and filtering the config path to `payment active`. The code will be found in the middle of the path. For example, for the entry of `payment/ccsave/active`, the payment code Magento will store on the order and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

CRONUS USA, Inc. | Posted Documents

CSM Shipping Carriers: Search + New Manage Open in Excel

API SET CODE	SALES CHANNEL CODE	SHIPPING AGENT CODE	EXTERNAL ID	EXTERNAL DESCRIPTION	TRACKING LABEL
MAGENTO1	MAGE1B2C	DHL	dhl	DHL	DHL Tracking Number
MAGENTO1	MAGE1B2C	FEDEX	fedex	Federal Express	Federal Express Tracking Number
MAGENTO1	MAGE1B2C	OWN LOG.	custom	Custom Shipping	Bill of Lading
MAGENTO1	MAGE1B2C	UPS	ups	UPS	UPS Tracking Number



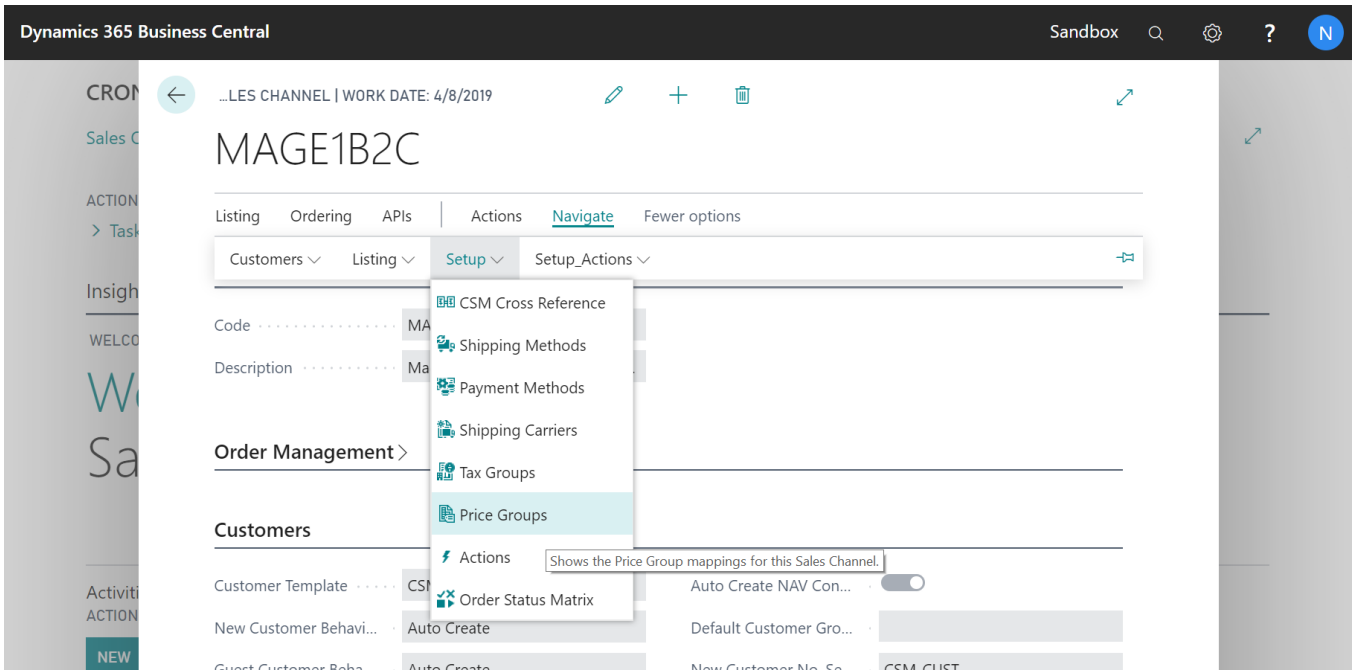
## CSM Tax Groups

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

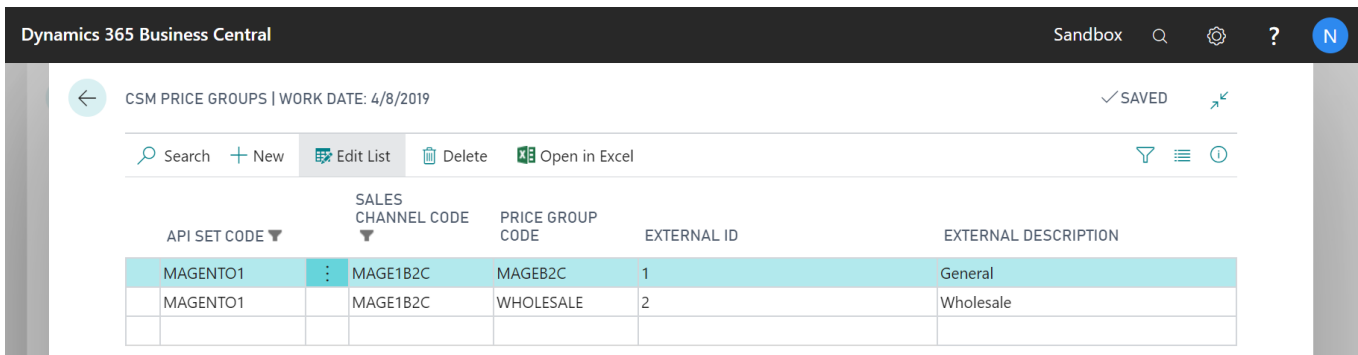
## CSM Price Groups

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

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

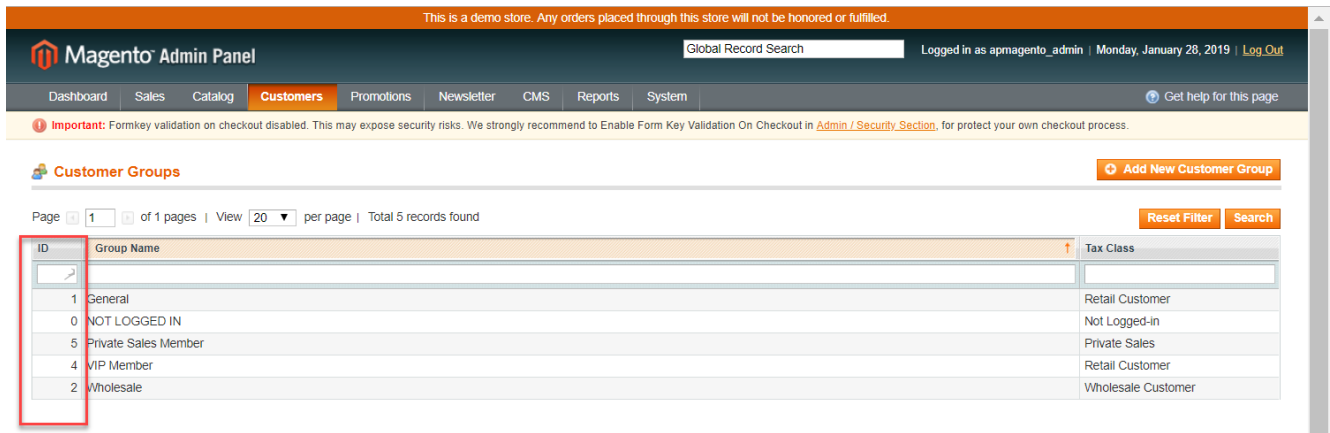


Each Business Central Price Group, that represents a customer group on Magento, should be added and linked to Magento. In the following example, we are linking 2 Business Central Price Groups to their Magento counter parts, which are the Magento ID of the Customer Group.



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

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.



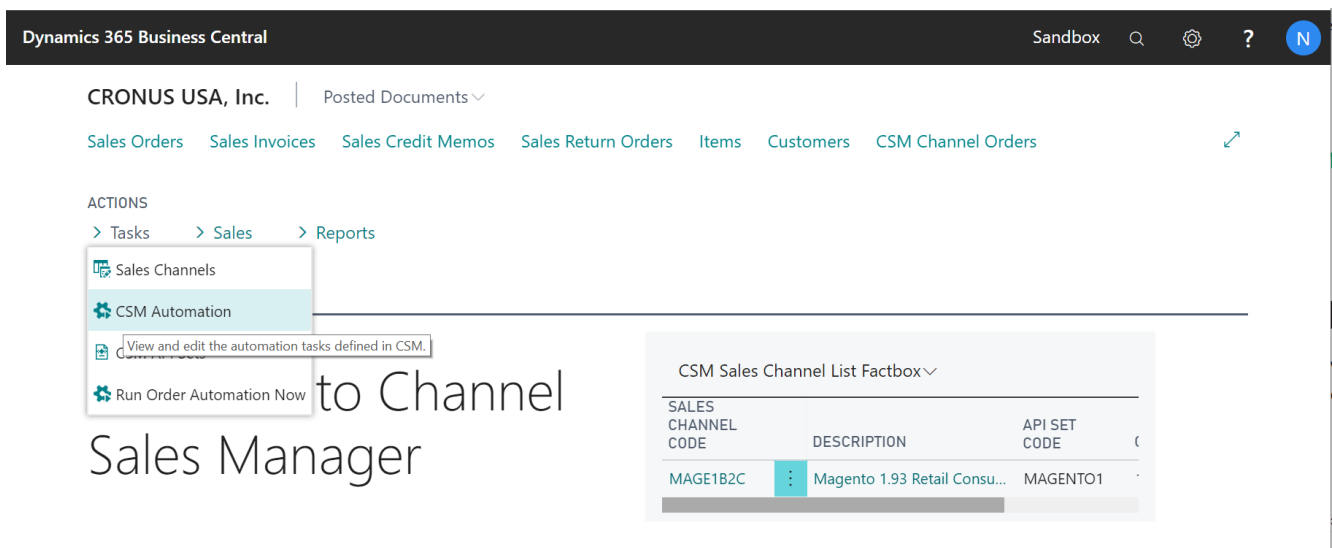
- Note, although it is preferred to have each Business Central Price Group, cross-referenced to a unique Magento Customer Group, it is possible for more than one Business Central Price Group to point to the same Magento Customer Group.

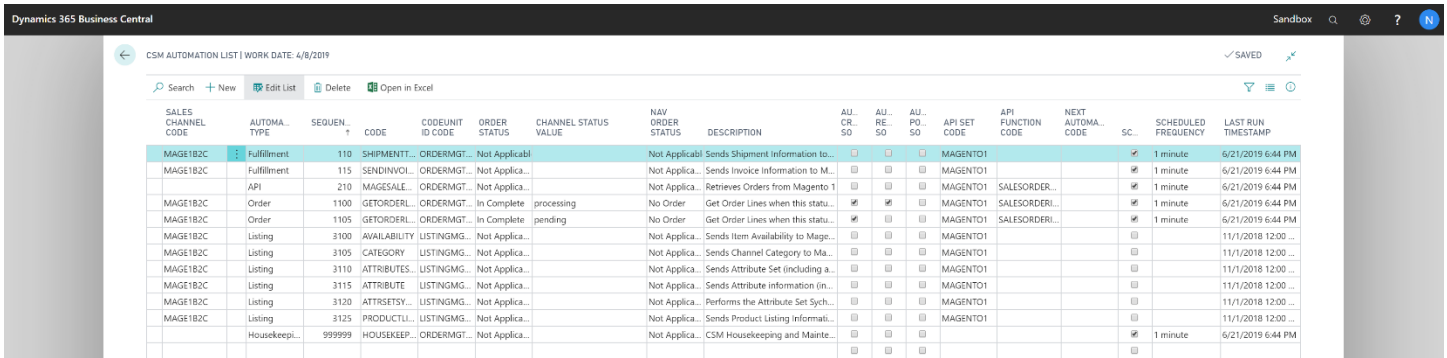
### CSM Order Status Matrix

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.





SALES CHANNEL CODE	AUTOMA... TYPE	SEQUEN... #	CODE	CODEUNIT ID CODE	ORDER STATUS	CHANNEL STATUS VALUE	NAV ORDER STATUS	DESCRIPTION	API SET CODE	NEXT AUTOMA... CODE	SCHEDULED FREQUENCY	LAST RUN TIMESTAMP
MAGE1B2C	Fulfillment	110	SHIPMENT...	ORDERMGT...	Not Applica...		Not Applica...	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
MAGE1B2C	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...	MAGENTO1	SALESORDER...	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	SALESORDER...	1 minute	6/21/2019 6:44 PM
MAGE1B2C	Listing	3100	AVAILABILITY	LISTINGMG...	Not Applica...		Not Applica...	Sends Item Availability to Mage...	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...	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	PRODUCTLL...	LISTINGMG...	Not Applica...		Not Applica...	Sends Product Listing Informati...	MAGENTO1			11/1/2018 12:00 ...
MAGE1B2C	Housekeep...	999999	HOUSEKEEP...	ORDERMGT...	Not Applica...		Not Applica...	CSM Housekeeping and Mainte...	MAGENTO1		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.

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

<b>Codeunit ID Code</b>	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
<b>Order Status</b>	This value is Not Applicable for Send Shipment information to Magento.	Not Applicable
<b>Channel Status Value</b>	This value is Not Applicable for Send Shipment information to Magento.	
<b>BC Order Status</b>	This value is Not Applicable for Send Shipment information to Magento.	
<b>Description</b>	A description of the entry.	Sends Shipment Information to Magento 1
<b>Auto Create SO</b>	This value is Not Applicable for Send Shipment information to Magento.	Not Checked
<b>Auto Release SO</b>	This value is Not Applicable for Send Shipment information to Magento.	Not Checked
<b>Auto Post SO</b>	This value is Not Applicable for Send Shipment information to Magento.	Not Checked
<b>API Set Code</b>	This value should be the API Set the Sales Channel uses	MAGENTO1
<b>API Function Code</b>	This value is Not Applicable for Send Shipment information to Magento.	
<b>Next Automation Code</b>	This value is Not Applicable for Send Shipment information to Magento.	
<b>Scheduled</b>	Should be checked (true) if you want this task to be processed when the Order Automation runs.	Checked (true)
<b>Scheduled Frequency</b>	A duration value indicating how often this task should run.	15 Minutes
<b>Last Run Timestamp</b>	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.

<b>Automation Task – Send Invoice Information to Magento</b>		
<b>Field</b>	<b>Description</b>	<b>Example Value</b>
<b>Sales Channel</b>	The Sales Channel for which Invoice Information should be sent.	MAGE1B2C
<b>Automation Type</b>	Should always be Fulfillment.	Fulfillment

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

## API Automation Tasks

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

### API Sales Order List:

This task will automatically retrieve any orders from Magento that are new or have changed since the last time CSM retrieved orders. Initially, the date that CSM uses to determine whether the orders are new or have changed is set by

the Sales Channel Setup Actions function: Starting Order Retrieval Date. Note that this API task only retrieves summary information regarding the order. Order lines and other order information is performed by the next automation task described: Get Order Lines

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

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

## Order Automation Tasks

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

### Get Order Lines Order Automation Task:

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

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

Automation Task – Retrieve Magento Orders		
Field	Description	Example Value
Sales Channel	The Sales Channel for which order line Information should be retrieved and processed.	MAGE1B2C
Automation Type	Should always be Order.	Order
Sequence	The Sequence in the Automation run that Order Line information is retrieved.	1100
Code	This value is for your reference since the Automation Task uses the API Set Code and the API Set Function Code to determine what to do.	GETORDERLINES
Codeunit ID Code	The Automation Codeunits use this code to determine whether they run this task.	ORDERMGTDDEFAULT
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



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

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



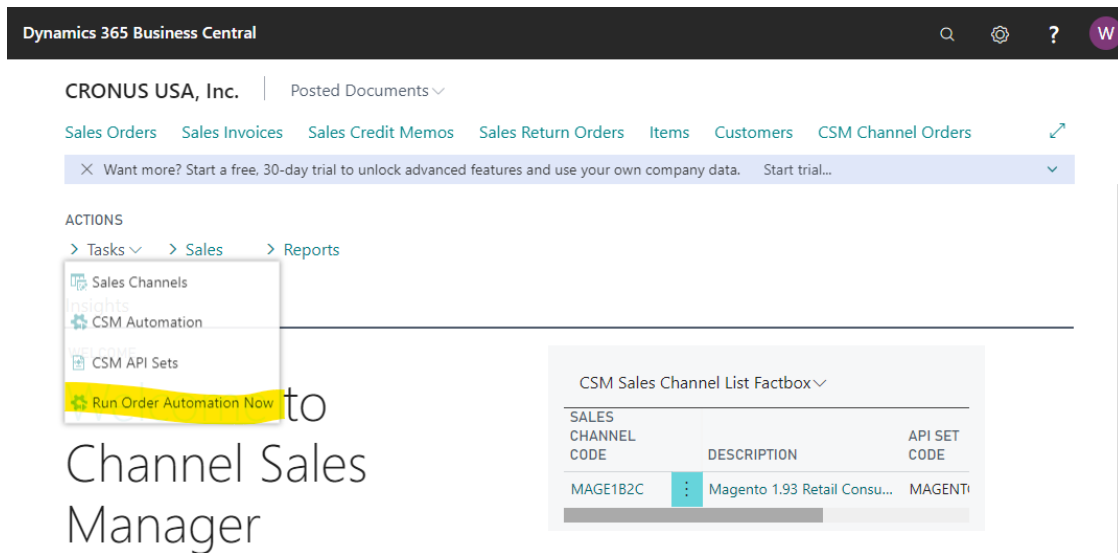
## CSM Everyday Operations

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

### Running the Automation Manually

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

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



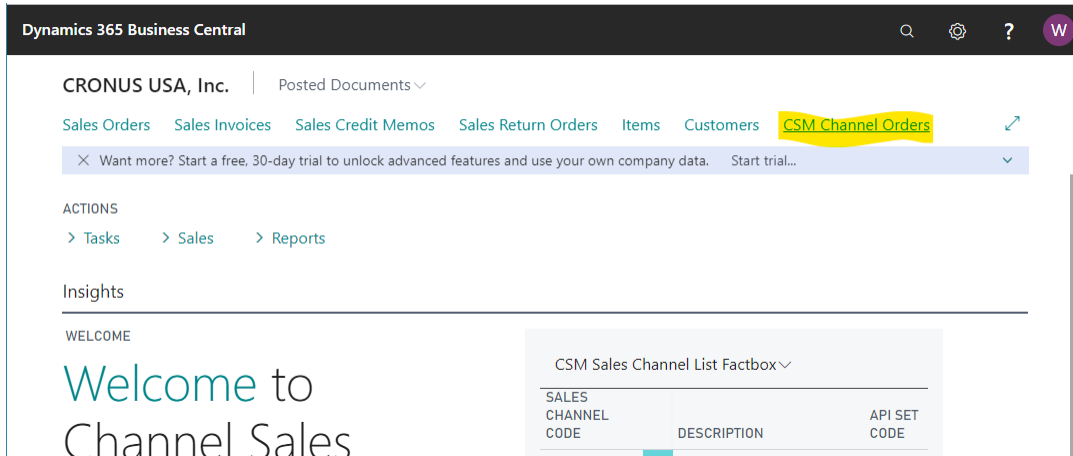
The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The 'ACTIONS' pane is open, showing a list of tasks including 'Sales Channels', 'Sales Channels insights', 'CSM Automation', 'CSM API Sets', and 'Run Order Automation Now'. The 'Run Order Automation Now' button is highlighted with a yellow background. To the right, a 'CSM Sales Channel List Factbox' is visible, displaying a table with columns for 'SALES CHANNEL CODE', 'DESCRIPTION', and 'API SET CODE'. The table contains one entry: 'MAGE1B2C', 'Magento 1.93 Retail Consu...', and 'MAGENTI'.

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

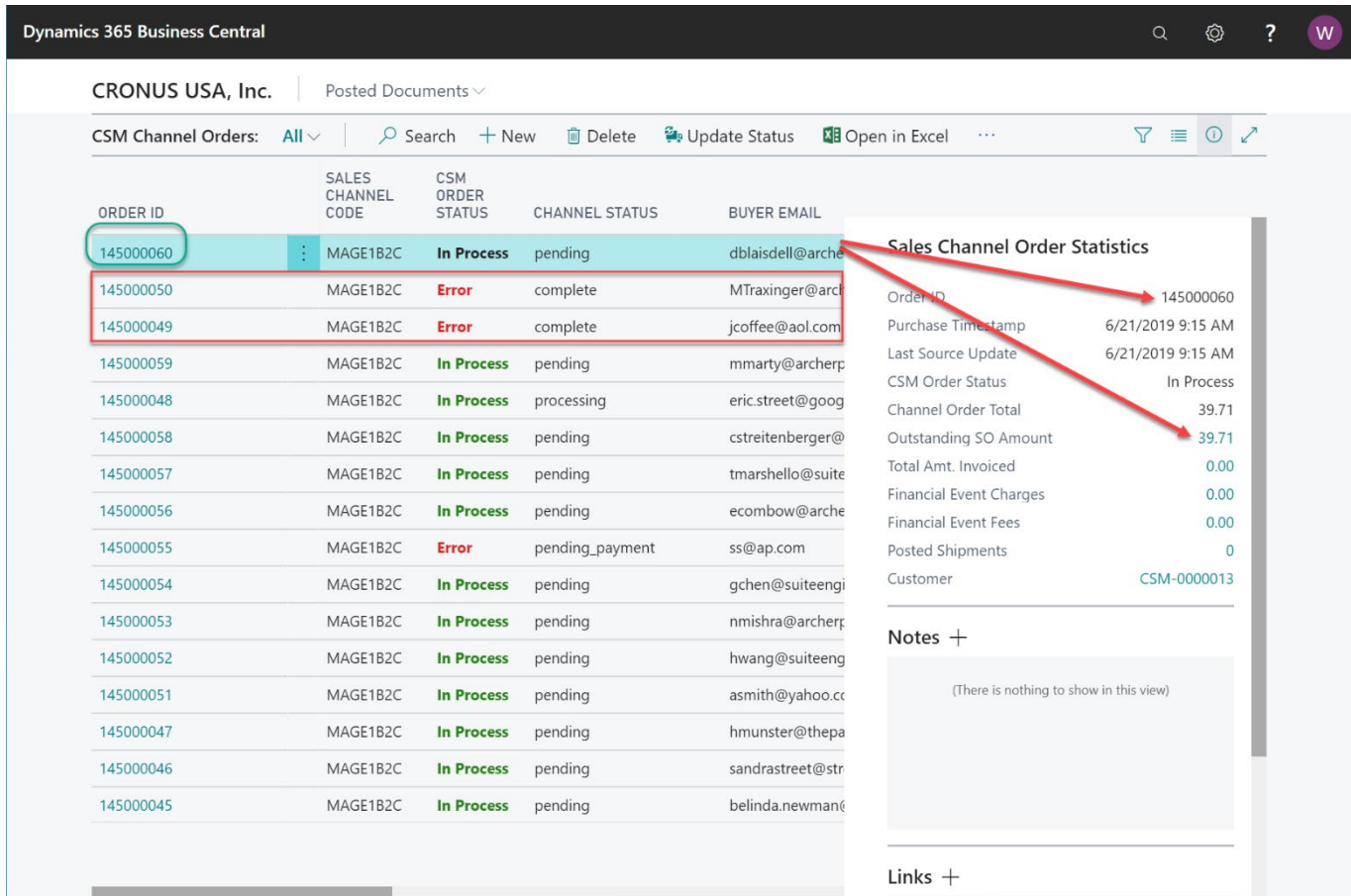
to  
Channel Sales  
Manager

## Viewing Channel Orders

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



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



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

### Sales Channel Order Statistics

Order ID: 145000060

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

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

CSM Order Status: In Process

Channel Order Total: 39.71

Outstanding SO Amount: 39.71

Total Amt. Invoiced: 0.00

Financial Event Charges: 0.00

Financial Event Fees: 0.00

Posted Shipments: 0

Customer: CSM-0000013

### Notes +

(There is nothing to show in this view)

### Links +

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

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

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

## Deleting Channel Orders

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

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

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

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

## Channel Order Card

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

Dynamics 365 Business Central

CSM ORDER | WORK DATE: 4/8/2019

### MAGE1B2C

Process Update Related Information Navigate Fewer options

**General**

Sales Channel Code	MAGE1B2C	Purchase Timestamp	11/6/2018 4:25 PM
Order ID	14500045	CSM Order Status	In Process
Buyer Email	belinda.newman@cronuscorp...	Order Status	Open
Buyer Name	Linda Newman	Order No.	CSM-MAG-0000002
Buyer Phone	444-555-1212	Shipment Status	Nothing Shipped

**Channel Order Lines** Manage

ORDER STATUS	CHANNEL ITEM NO.	CHANNEL ITEM DESCRIPTION	QUANTITY	ITEM PRICE	ITE
NotShipped	722252110022	LUNA BAR - Dark Chocolate HL...	5.00	2.39	
NotShipped	hdd004	Stone Salt and Pepper Shakers	1.00	65.00	
NotShipped	10001112222	ArcherPoint Client Appreciatio...	2.00	10.00	

**CSM Order Documents** Manage

ORDER DOCUME... TYPE	ORDER DOCUMENT NO.	CHANNEL DOCUMENT NO	CHANNEL CREATION DATE	CHANNEL PAYMENT METHOD
Payment	1	1		ccsave

**Shipping** >

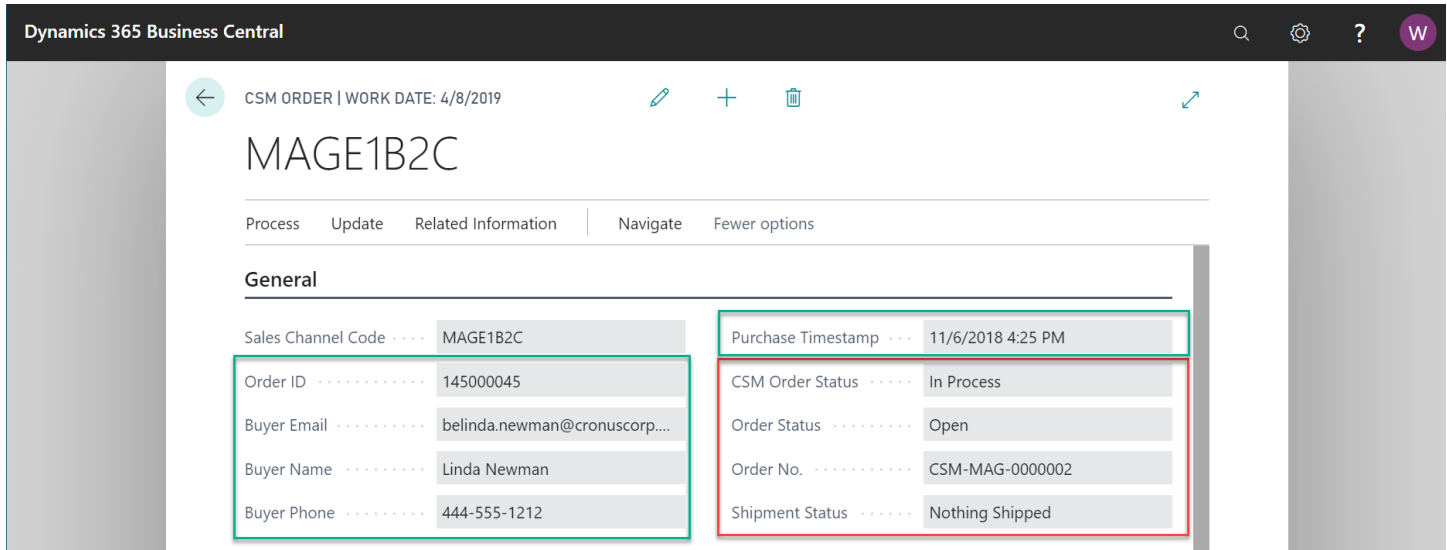
**Invoicing** >

**Channel Data**

Channel Status Value	pending	MarketplaceId	1
Channel Customer C...	141	Channel Order Type	new
Guest Customer	<input type="radio"/>	Is Prime Order	<input type="radio"/>
Seller Order ID	1	Is Premium Order	<input type="radio"/>
Fulfillment Channel		Is Business Order	<input type="radio"/>

## 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 Business Central

CSM ORDER | WORK DATE: 4/8/2019

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	Open
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.

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.

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.

## Shipping FastTab

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

### Shipping

Ship Service Level	UPS_GND	Location ID	
Ship Service Name	United Parcel Service - Ground	Weight	3.96
Ship Service Description	United Parcel Service - Ground	<b>SHIP TO ADDRESS</b>	
Ship Service Level Category		Ship To Name	Belinda Newman
Number of Items Shipped	0.00	Ship To Address 1	140 Cronus Corp Drive
Number of Items Unshipped	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.

### 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
<b>BILLING ADDRESS</b>		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	<b>Channel Order Total .....</b>	<b>110.10</b>
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 .....	<input type="checkbox"/>	Is Prime Order .....	<input type="checkbox"/>
Seller Order ID .....	1	Is Premium Order .....	<input type="checkbox"/>
Fulfillment Channel .....		Is Business Order .....	<input type="checkbox"/>
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.



- 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

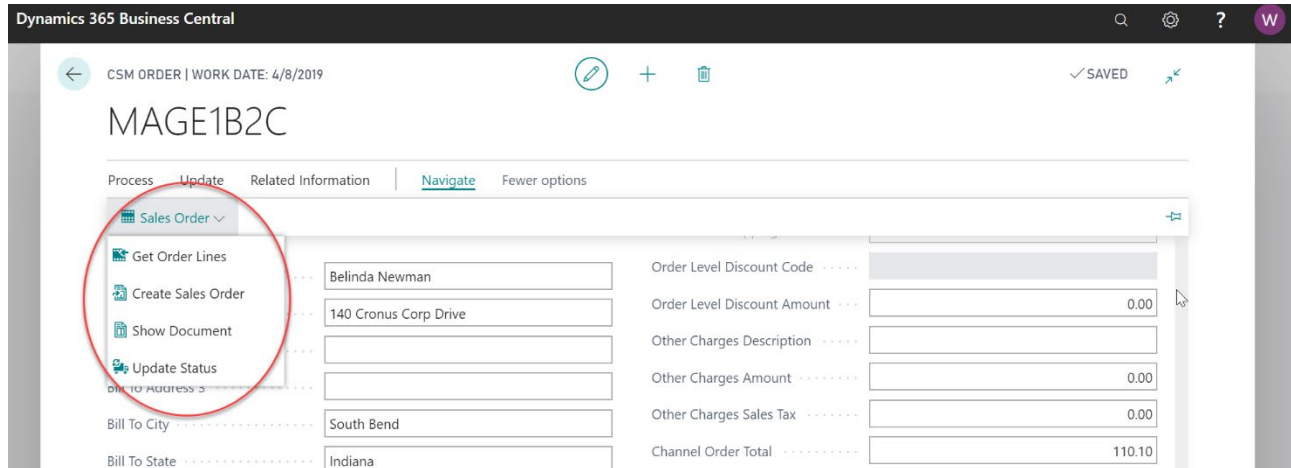
This fast tab on the channel order mostly contains housekeeping information regarding the Channel Order such as user information and relevant transaction and communication dates. Of interest in this section is the Status Text Field. If a Channel Order has a status of Error, the reason as to why it is 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	<input checked="" type="checkbox"/>
Last Source Update	11/6/2018 4:25 PM	Acknowledgement Processed	
Last Import Update	7/1/2019 8:44 PM	Last Acknowledgement Sent	
Imported by User ID	WMS	Last Acknowledgement Result	
Imported Date	7/1/2019	Status Text	A Sales Order was built Successfully for Externi

## Channel Order Actions

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



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

## Sales Channel Customers

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

MAGE1B2C

Listing Ordering APIs Actions Navigate Fewer options

General >

Order Management >

**Customers**

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

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

MAGE1B2C

Listing Ordering APIs Actions Navigate Fewer options

Sales Channel Customers Add Channel Customer

Order Management >

**Customers**

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

Listing Management >

Dynamics 365 Business Central

CSM CUSTOMERS | WORK DATE: 4/8/2019

Search + New Edit List Delete Open in Excel More options

SALES CHANNEL CODE	CHANNEL USER CODE	CHANNEL FIRST NAME	CHANNEL LAST NAME	INITIAL CHANNEL PASSWORD	GU... CH...	CUSTOMER NO.	CONTACT NO.	EXTERNAL ID
MAGE1B2C	asmith@yahoo.com	Alex	Smith		<input checked="" type="checkbox"/>	CSM-000005	CT000033	
MAGE1B2C	belinda.newman@cronuscorp.n...	Linda	Newman		<input type="checkbox"/>	CSM-000002	CT000027	141
MAGE1B2C	cstreitenberger@archerpoint.c...	Cindy	Streitenberger		<input checked="" type="checkbox"/>	CSM-000011	CT000045	
MAGE1B2C	dblaisdell@archerpoint.com	Denise	Blaisdell		<input checked="" type="checkbox"/>	CSM-000013	CT000049	
MAGE1B2C	ecombow@archerpoint.com	Ely	Combow		<input checked="" type="checkbox"/>	CSM-000009	CT000041	
MAGE1B2C	eric.street@google.net	Eric	Street		<input type="checkbox"/>	CSM-000001	CT000025	142
MAGE1B2C	gchen@suiteengine.com	Gary	Chen		<input checked="" type="checkbox"/>	CSM-000008	CT000039	
MAGE1B2C	hmunster@theparlor.com	Herman	Munster		<input checked="" type="checkbox"/>	CSM-000004	CT000031	
MAGE1B2C	hwang@suiteengine.com	Heather	Wang		<input type="checkbox"/>	CSM-000006	CT000035	143
MAGE1B2C	mmarty@archerpoint.com	Marty	McMarty		<input checked="" type="checkbox"/>	CSM-000012	CT000047	
MAGE1B2C	nmishra@archerpoint.com	Nilesh	Mishra		<input checked="" type="checkbox"/>	CSM-000007	CT000037	144
MAGE1B2C	sandrastreet@streetco.com	Sandra	Street		<input type="checkbox"/>	CSM-000003	CT000029	140
MAGE1B2C	tmarshello@suiteengine.com	Tom	Marshello		<input type="checkbox"/>	CSM-000010	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.

MAGE1B2C

Process Update **Related Information** | Navigate Fewer options

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**General**

Sales Channel Code	MAGE1B2C	Buyer Phone	444-555-1212	Order No.	CSM-MAG-0000002
Order ID	145000045	Purchase Timestamp	11/6/2018 4:25 PM	Shipment Status	Full Single Shipment
Buyer Email	belinda.newman@cronuscorp.net	CSM Order Status	In Process		
Buyer Name	Linda Newman	Order Status	Open		

---

**Channel Order Lines** | Manage

ORDER STATUS	CHANNEL ITEM NO.	CHANNEL ITEM DESCRIPTION	QUANTITY	ITEM PRICE	EXTENDED ITEM PRICE	ITEM TAX	SHIPPING PRICE	SHIPPING TAX	GIFT WRAP PRICE	GIFT WRAP TAX	GIFT WRAP 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	hd4004	Stone Salt and Pepper Shakers	1.00	65.00	65.00	0.00	0.00	0.00	0.00	0.00		
Shipped	10001112222	ArcherPoint Client Appreciation...	2.00	10.00	20.00	0.00	0.00	0.00	0.00	0.00		

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**CSM Order Documents** | Manage

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

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.

## 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.

MAGE1B2C

Process Update **Related Information** Navigate Fewer options

---

**General**

Sales Channel Code	MAGE1B2C	Buyer Phone	444-555-1212	Order No.	CSM-MAG-0000002
Order ID	145000045	Purchase Timestamp	11/6/2018 4:25 PM	Shipment Status	Full Single Shipment
Buyer Email	belinda.newman@cronuscorp.net	CSM Order Status	In Process		
Buyer Name	Linda Newman	Order Status	Open		

---

**Channel Order Lines** Manage

ORDER STATUS	CHANNEL ITEM NO.	CHANNEL ITEM DESCRIPTION	QUANTITY	ITEM PRICE	EXTENDED ITEM PRICE	ITEM TAX	SHIPPING PRICE	SHIPPING TAX	GIFT WRAP PRICE	GIFT WRAP TAX	GIFT WRAP 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	hd0004	Stone Salt and Pepper Shakers	1.00	65.00	65.00	0.00	0.00	0.00	0.00	0.00		
Shipped	10001112222	ArcherPoint Client Appreciation...	2.00	10.00	20.00	0.00	0.00	0.00	0.00	0.00		

---

**CSM Order Documents** Manage

ORDER DOCUME... TYPE	ORDER DOCUMENT NO.	CHANNEL DOCUME... NO	CHANNEL PAYMENT METHOD	AMOUNT	SECONDARY AMOUNT	EXTERNAL ID	LAST EXTERNAL UPDATE RESULT	SHIPMENT CARRIER	CO. SHI...	SHIPMENT TRACKING TITLE	SHIPMENT TRACKING NUMBER
Payment	1	1	ccsave	110.10	13.15	1					
Shipment	S-SHPT102215			0.00	0.00	100000057	Successful Shipment and Tracki...	ups	<input checked="" type="checkbox"/>	UPS Tracking Number	TestTrackingNo-111111
Invoice	PS-INV103215		ccsave	110.10	0.00	103000032	Successful Shipment Sent to Ch...				

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



## Channel Order Archiving

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

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



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

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

## Viewing Archived CSM Channel Orders

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

Archived CSM orders contain the same layout, FastTabs, FactBoxes, and fields as active CSM orders. You can also view any existing order line option records by choosing an order line in the Channel Order Archive Lines FastTab, choosing the Manage action, and then choosing the Order Line Archive Options action.

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

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

## Troubleshooting CSM Activities

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

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

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



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

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

## 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
<b>Code</b>	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
<b>Description</b>	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 <sup>nd</sup> API set for an additional Magento 1.x instance you may deploy.	Magento version 1.96 Soap V2 API
<b>API Set Behavior</b>	This tells us which channel we are dealing with, for Magento 1.x hosts, you should choose Magento from the dropdown.	Magento
<b>Session API Function Code</b>	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
<b>Session Timeout</b>	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

	attempted with the channel, if the session is more than 5 minutes old, CSM will start a new session with the channel (Magento).	
<b>HTTP Web Request Timeout</b>	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
<b>Host</b>	This is the host URL endpoint for soap services on your Magento 1.xx server. Normally it is your Magento store URL with an additional path of /api/v2_soap/index/	http://mymagneto.mycompany.com/api/v2_soap/index/
<b>User ID</b>	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
<b>API Key</b>	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