



Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager for Shopify

Release: 2.0

Version: 2.0.2021100819.34442

Release Date: 10/08/2021

Please install this release in your Business Central sandbox environment for testing. It is Suite Engine's recommendation that you test not only the areas specifically addressed within this release but all your business processes, so that you may confirm that changes introduced in this release have not created issues in other parts of your application. These release notes should be fully reviewed as part of your testing process, as they may include information on new setup and configuration requirements.

If you encounter issues in your testing, please contact your Suite Engine partner or file a support ticket at <https://suiteengine.com/support>.

Once you have completed testing in your sandbox, you can proceed to installing this release in your live environment. Suite Engine recommends that users be logged out of Business Central prior to installation of the release; if this is not possible, please advise your users that it may be necessary to refresh or log out/log in to Business Central in order to continue working with the application.

This release is issued under the assumption that you have kept your existing Suite Engine applications current. Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.

This release may introduce new table objects or modifications to existing ones. If you are maintaining configuration packages for the purpose of moving data to and from database environments, you are advised to take note of any table changes (for a complete list of release objects, see [here](#)) and make any adjustments to these packages as needed.

Release Overview

Features and Functionality

- Support for Shopify POS has been added to CSM for Shopify. See the [in-depth features description](#) for more details.
- Shopify returns can now be processed in Business Central as sales credit memos. See the [in-depth features description](#) for more details.
- Functionality has been added to automate the creation of CSM listing records for Shopify product variants and better associate them to Business Central records:
 - Populating the **External ID** field in the **Listing Status** FastTab on the **CSM Listing** page and then choosing the **Get External Inventory Supply** action instructs CSM to identify a Shopify product listing with a corresponding product ID.
 - If the Shopify product does not have multiple variants defined, CSM associates the listing to that Shopify product and populates the **External Inventory ID** and **External SKU ID** fields with the corresponding values from Shopify.

- If the CSM listing is set as a configurable channel product type and multiple variants exist for the Shopify product, it acts as a “parent” listing in Business Central. Its **External Inventory ID** and **External SKU ID** fields remain blank.
- A new **Product Configurable Options** FastTab has been added to the **CSM Listing** page. This FastTab presents the different options by which the product’s variants are categorized in Shopify. This FastTab is only displayed for CSM listing records that are identified as configurable product listings and have been associated to a Shopify product.
- Additional CSM listing records are set up for each variant that exists for the product in Shopify. The **External Inventory ID** and **External SKU ID** fields on each variant listing are populated with the corresponding values from Shopify.
- These variant listings act as “children” to the parent listing. They are visible in the **CSM Listing Attribute List** FastTab on the parent CSM listing’s page.
- CSM attempts to link variant listings to an existing Business Central record, using the value in the **Channel Item SKU** field.
- A new *Variant* option has been added to the list of available selections for the **Channel Product Type** field on the **CSM Listing** page. This setting is automatically assigned to CSM listings that have been identified as Shopify variants.
- A new **Variant Option Values** FastTab has been added to the **CSM Listing** page. This FastTab presents the variant-specific settings that have been defined for the variant in Shopify. This FastTab is only displayed for CSM listing records that are identified as variants in the **Channel Product Type** field.

Corrections

- Default channel order archiving settings on the **CSM Setup** page were not being assigned to new Shopify channels that were created via the setup wizard. This has been corrected.
- The Load Matrix and Automation procedures in the Shopify API utility codeunit were missing variable elements. This has been corrected
- A number of Shopify-specific event subscribers were being run for all CSM channel records. This has been corrected.
- The response for Shopify API messages was not always being received in a JSON format. This has been corrected.

Miscellaneous

- Additional scenarios for CSM customer creation, CSM listing creation, and CSM channel category creation have been added to Suite Engine’s automated testing codeunits for Shopify.
- The CSM for Shopify demo data load has been expanded to include default carrier codes and Shopify payments.

In-Depth Features

Shopify POS Support

It is necessary to set up a separate CSM sales channel record in CSM for every channel that supports Shopify POS. For example, if you had three Shopify channels set up and two of them supported Shopify POS, you would need to set up two additional channels.

Creating a Shopify POS Channel from a B2C Shopify Channel

- Go to the ‘CSM Sales Channel’ card

- Click on 'Related' > 'Setup Actions' > 'Create POS Channel'. This triggers the 'CSM Shopify POS Wizard'.
- 1st Window of the 'CSM Shopify POS Wizard'
 - Select from which Sales Channel do you want to create the new POS channel (where you want to copy the information for the new channel)
 - Switch on the 'Load Automation'
- 2nd Window of the 'CSM Shopify POS Wizard'
 - Select and turn on the switch of the data that you wish/need to copy from the Sales Channel previously selected.
- 3rd Window of the 'CSM Shopify POS Wizard'
 - Verify the Sales Channel code, description and assign the Shopify POS Location ID. (If you do not know how to get this ID, please go to the section 'CSM Inventory Locations' of this document for instructions).
 - Go to the Role Centre
 - You will see your new CSM Sales Channel for POS created.

Shopify POS Channel Settings

The following settings should be entered on Shopify channel records that are set up for POS channels:

Order Management FastTab

- **Payment Behavior:** select the *Channel* option.
- **Payment Method Code:** the assigned payment method code must have a blank balancing account (see the following section for more information).
- **Send Shipment Information:** this option must be disabled.
- **Send Invoice Information:** this option must be disabled.
- **Send Invoice Capture:** this option must be disabled.

API Data FastTab

- **POS:** this option must be enabled.
- **POS Location Id / Shop Name:** enter the Shopify location ID that represents the sales channel's location. The **Shop Name** field will be automatically populated once an ID is entered.

Shopify POS

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

Prerequisites:

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



POS transaction flow:

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

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

Returns

CSM for Shopify supports the processing of returns for both standard channels and POS orders.

Standard Returns from Shopify Admin portal

There may be times when a customer returns previously purchased items, but you do not want them reflected on your Main location inventory, and at the same time track them, even if they are destroyed in the future.

For those cases, our CSM product has the 'Returnless' functionality.

At the CSM Sales Channel, you can assign a location code on the 'Returnless Location' field for those cases and be able to track the items that were returned without mixing them with the available inventory/quantity on hand of your MAIN location.

Refund discrepancies: There may situation when the customer purchased an item for a value and there is a refund for a higher value.

For those scenarios, we have in our CSM app at the CSM Sales Channel card, the 'Refund Discrepancy...' fields.

You can select how they will be appearing on the orders where the discrepancy happens. We suggest using 'Line,' type 'G/L Account,' and then you select the G/L number you would like that discrepancy to go to.



Processing Shopify POS Order Returns

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

Go to BC and run the Automation.

The system receives the notification of the return processed on Shopify POS and Creates a 'CreditMemo' line on the 'CSM Order' > 'CSM Order Document' FastTab, posts it and applies it towards the invoice of the involved CSM Order. (If the auto document creation is not enabled on the automation the user can select the sales return line in the CSM Order Document and press the create credit memo.)

Creates a 'SalesReturn' line on the 'CSM Order' > 'CSM Order Document' FastTab

Creates 'Refund' lines on the 'CSM Order' > 'CSM Order Document' FastTab for each of the methods used on the order.

You can easily review the Credit Memo generated either through the FactBox from the CSM Channel order list, from within the CSM Order, at the Customer Ledger Entries page and Posted Sales Credit Memo list.

Important fields to consider for the returns:

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

Navigating the documents of your 'CSM Order Documents' FastTab:

- Click on 'Manage' on the FastTab ribbon button
- Click on 'Document Lines'
- Alternatively, click the row of the document you want to investigate, then hover over the FactBox and click on the shortcut link for the document you want to see.

Release Objects

The following objects have been created, modified, or deprecated as part of this release:

Object Type	Object ID	Object Name	Action
Page	70338376	CSM Shopify Setup Wizard	Modified
Page	70338377	CSMShopifyPOSWizard	Created
Codeunit	70338375	CSM Shopify Utility Functions	Modified
Codeunit	70338376	CSM API Shopify Processing	Modified
Codeunit	70338377	CSM Shopify Response Mgt	Modified
Codeunit	70338378	CSM Stripe Integration Shopify	Modified
Codeunit	70338379	CSM Shopify Data Load	Modified
Codeunit	70338380	CSM Shopify Upgrade	Modified



Object Type	Object ID	Object Name	Action
Codeunit	70338381	CSM Shopify Product Management	Created
TableExtension	70338375	CSM Listing Shopify Additions	Created
TableExtension	70338376	CSM Sales Channel Shopify	Created
PageExtension	70338378	CSM Sales Channel Shopify	Modified
PageExtension	70338379	CSM Listing Shopify Additions	Created
PageExtension	70338380	CSMSalesChannelListFBShopify	Created
PageExtension	70338381	CSM Order Documents Shopify	Created
EnumExtension	70338376	CSM Listing Type Addition	Created

Integration Events

The following integration events have been added as part of this release:

Object Type	Object ID	Object Name	Integration Events
Codeunit	70338375	CSM Shopify Utility Functions	<ul style="list-style-type: none"> OnBeforeFindSalesChannelOrdersForSalesReturn
Codeunit	70338377	CSM Shopify Response Mgt	<ul style="list-style-type: none"> OnAfterShopifyGeneralListResponse