



Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager for Magento

Release: 2.0

Version: 2.0.2022022419.41721

Release Date: 02/28/2022

Minimum Business Central Version Compatibility: 18.0

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 of 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 separate.

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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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 is compatible with the Business Central version listed above as the **Minimum Business Central Version Compatibility** and all subsequent Business Central versions; if you are deploying this release in a Business Central environment that has an earlier version than this value, functionality may not work as intended.

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

- License contact e-mail validation has been removed from CSM for Magento, as this functionality is now executed through Suite Engine's subscription management module.
- Field captions on various CSM pages have been updated to use Magento-specific terminology.
- Channel credentials such as store IDs and secret tokens are now stored in a separate **API Credential** table, rather than API sets. This provides companies with greater flexibility in the setup and maintenance of Magento channel credentials. As part of this, the **Credentialing Sales Channel** field in the **CSM Sales Channel** table allows users to indicate that a particular sales channel's API functions are to be run according to the credentials of another channel. See the [in-depth feature description](#) for more details.



- Supporting data retrieval has been added for the following data types:
 - Shipping Methods
 - Shipping Carriers
 - Tax Groups
 - Price Groups

This functionality can simplify setup activities by allowing users to instantly populate CSM tables with records that have either been retrieved directly from a connected Magento platform or a default data load. See the [in-depth feature description](#) for more details.

- The ability to send supporting data information from Business Central to a connected Magento platform has been added for the following data types:
 - Tax Groups
 - Price Groups

This functionality can simplify setup activities by allowing users to instantly create new Magento records from Business Central, or update existing Magento records with Business Central changes. See [the in-depth feature description](#) for more details.

- Several improvements have been made to API features for Magento 2 environments:
 - Functionality has been added to support CSM automation list records with a blank sales channel code.
 - The ability to send sales channel customer information from Business Central to a connected Magento platform is now supported.

Corrections

- Default channel order archiving settings on the **CSM Setup** page were not being assigned to new Magento channels that were created via the setup wizard. This has been corrected.
- Channel test communication functionality was not working properly with integrations to Magento 2 environments. This has been corrected.
- Duplicate sales lines were being created on sales orders that were generated from CSM order lines for configurable items. This has been corrected.
- A hexadecimal error was being generated when attempting to parse non-English characters, such as Arabic or Chinese. This has been corrected.

Miscellaneous

- CSM for Magento's automated test scripts have been expanded to include additional testing scenarios.

In-Depth Features

Setting Up Channel Credentials

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

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

- **Scenario 1:** You have a United States presence in 15 states, and have defined a separate sales channel for each state. In this scenario, you may have a single set of credentials that you wish to apply to all 15 channels. In such a scenario, you set up the credentials for your Georgia channel, then make the Georgia channel your credentialing channel for your channels in Florida, Texas, etc. When you process an API activity through your Florida channel, for example, the credentials that have been set up for Georgia will be used.
- **Scenario 2:** You have a North American and a European presence, with a separate sales channel in each region. In this case, you may have two separate sets of credentials for North America versus Europe. In such a scenario, you assign these separate credentials to each of these channels.

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

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

Supporting Data Retrieval

CSM allows you to retrieve or load the following supporting data types into Business Central from an integrated Magento platform:

- Shipping Methods
- Shipping Carriers
- Tax Groups
- Price Groups

Retrieving Shipping Methods

By default, Magento supports a number of standard delivery methods. Although extensions exist to add delivery methods for other methods, it is not possible for Magento users to manually set up new records.

You can automatically load new CSM shipping method records that are based on Magento's default records:



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

CSM creates new CSM shipping method records based on the default methods that are supported by Magento. If CSM is able to identify a Business Central shipping agent code that is identical to a CSM shipping method record's external ID, it

will automatically link these records by assigning the value in the **Shipping Agent Code** field. If CSM cannot identify a shipping agent code that matches a CSM shipping method's external ID, a new shipping agent code will be created and assigned to the CSM shipping method line.

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

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

Retrieving Shipping Carriers

By default, Magento supports the following common carriers:

- DHL
- FedEx
- UPS
- USPS

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

You can automatically load new CSM shipping carrier records that are based on Magento's default records:



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

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

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

Retrieving Tax Groups

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



2. Open the CSM sales channel record for which you want to retrieve tax groups.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Tax Groups** action.
4. In the **CSM Tax Groups** window, choose the **Actions** ribbon, then choose the **Retrieve Tax Groups** action.

CSM retrieves tax class records from the sales channel's connected Magento store and creates new CSM tax group records for each one. The **Tax Group Code** field is the field that shows the Business Central tax group that is linked to the CSM tax group. The format of the text in will be red, bold, italic if the value could not be found as an existing Business Central tax group. The format will be normal if the tax group code matches a Business Central tax group code.

Retrieving Price Groups

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



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

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

Sending Supporting Data

CSM allows you to send information for the following supporting data types from Business Central and into an integrated Magento platform:

- Price Groups
- Tax Groups

Sending Tax Groups

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



2. Open the CSM sales channel record for which you want to send tax groups.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Tax Groups** action.
4. In the **CSM Tax Groups** window, choose the CSM tax group line that you want to send to Magento. This record must have an assigned Business Central tax group.
5. If necessary, enter the value that Magento will use to identify the tax group in the **External Description** field.
6. Choose the **Actions** ribbon, then choose the **Send to External** action.

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

Sending Price Groups

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



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

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

Release Objects

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

Object Type	Object ID	Object Name	Action
Page	70338301	CSM Magento Setup Wizard	Modified
Codeunit	51002	CSM Test Library	Created
Codeunit	51003	CSM Magento2 Test	Created
Codeunit	70338300	CSM Magento Utility Functions	Modified
Codeunit	70338301	CSM API Magento Processing	Modified
Codeunit	70338304	CSM Magento Data Load	Modified
Codeunit	70338305	CSM API Magento M2 Processing	Modified
Codeunit	70338306	CSM Magento M2 Response Mgt	Modified



Release Extensions

The following extensions have been created, modified, or removed as part of this release:

Object Type	Object ID	Object Name	Action	Extends
PageExtension	70338300	CSMSetupMagentoAdditions	Created	CSM Setup
PageExtension	70338301	CSM Price Groups Magento Ext	Created	CSM Price Groups
PageExtension	70338302	CSM Tax Groups Magento Ext	Created	CSM Tax Groups
PageExtension	70338303	CSM API Credentials Magento	Created	CSM API Credential
PageExtension	70338304	CSM Order Magento Ext	Created	CSM Order
PageExtension	70338305	CSM Order Documents Extension	Created	CSM Order Documents
PageExtension	70338306	CSM Shipping Methods Magento	Created	CSM Shipping Methods
PageExtension	70338307	CSM Shipping Carriers Magento	Created	CSM Shipping Carriers
PageExtension	70338308	CSM Payment Methods Magento	Created	CSM Payment Methods
PageExtension	70338309	CSM Inventory Location Magento	Created	CSM Inventory Locations
PageExtension	70338310	CSM Sales Channel Magento Ext	Created	CSM Sales Channel
PageExtension	70338311	CSM Product Info Magento Ext	Created	CSM Product Information Card
PageExtension	70338312	CSM Sales Channel Factbox Mage	Created	CSM Sales Channel List Factbox

Integration Events

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

Object Type	Object ID	Object Name	Integration Events
Codeunit	70338305	CSM API Magento M2 Processing	<ul style="list-style-type: none">• OnBeforeGetCredential(CSMAPIFunction:• OnAfterGetCredential(CSMAPIFunction: