



Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager for Shopify

Release: 3.0

Version: 3.0.2022041220.44572

Release Date: 04/12/2022

Minimum Business Central Version Compatibility: 18.2

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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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

Upgrade Instructions

This release introduces a new **Channel Shipping Method** field (field number 205) to the **CSM Order** table, which replaces the **Ship Service Level** field (field number 200). If you are upgrading your existing CSM integration with this release, you must make the following changes to ensure that your solution continues to operate as desired:

1. Update your existing API mapping. In the **CSM API Functions** page, select the API function code *SALESORDERLIST*. Choose the **API Mappings** button in the ribbon, and in the **CSM API Mappings** page, locate the existing mapping for table 70338221, field 200 and update this field number to 205.
2. Update any custom extensions that use the legacy **Ship Service Level** field to use the new **Channel Shipping Method** field.

Features and Functionality

- Support for Microsoft Dynamics 365 Business Central 2022 Wave 1 (version 20) has been added to CSM for Shopify.
- Field captions on various CSM pages have been updated to use Shopify-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 Shopify 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.
- API credential information was previously included as part of the URL that is generated whenever a request is sent to Shopify. To improve security, this information has been removed from the URL and is instead included as part of the request header.
- A new **Order Total Discount Allocation** field has been added to the **CSM Sales Channel** table. In this field, you can select the method by which CSM will allocate retrieved line discount amounts from Shopify. Options are:
 - *Not Applicable*: channel discount information will be ignored by CSM.
 - *Order Level*: channel discount information will be applied at the order level. Retrieved line discount amounts will be rolled up into a single document level invoice discount.
 - *Line Level*: channel discount information will be applied at the order line level. Retrieved line discount amounts will be assigned to the corresponding channel order lines.
- Supporting data retrieval has been added for the following data types:
 - Shipping Methods
 - Shipping Carriers

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

- Shopify-specific accommodations have been made to support the addition of a new **Channel Shipping Method** field has been added to the **CSM Shipping Method** and **CSM Order** tables and their related pages in CSM Core. This field replaces the existing **Ship Service Level** field, which is where an external platform's retrieved shipment method code was stored. The existing field entered these retrieved values as Business Central codes, which resulted in a format that was incompatible with some platforms. The new field retrieves these values as text, which will support all data retrieval scenarios. See the [upgrade instructions](#) for more details.
- Shopify-specific accommodations have been made to support the addition of a new **Single Capture** Boolean field to the **CSM Payment Method** table. When this option is enabled for a CSM order's assigned payment method, CSM will capture and send the payment to the sales channel when the related Business Central sales order is fully shipped and invoiced. If the sales order is partially shipped and invoiced, no payment capture is recorded. Because Shopify does not permit multiple credit card payment capture activities against the same transaction, this option should be enabled for the relevant CSM payment method records.
- Shopify gift cards can now be issued and managed from within Business Central. See the [in-depth feature description](#) for more details.
- It is now possible to run the **Get External Inventory Supply** action against multiple selected CSM listing records.
- Several improvements have been made to the way in which CSM handles API request errors that are due to Shopify being unable to provide a response to the request:
 - Previously, failure to obtain a response for any request would abort the entire automation routine. This has been changed so that the automation routine continues to run after an API request returns a no response error.



- The **Last External Update Status** field on the **CSM API Message** record that is created for an erroneous API provides a value of *Error*.
- The **Last External Update Result** field on the **CSM API Message** record that is created for an erroneous API request now presents the erroneous result information (previously this field remained blank).
- The **Response** FastTab on the **CSM API Message** record that is created for an erroneous API request now presents the actual error message (previously this field defaulted to a value of *No Response*).

Corrections

- CSM for Shopify's API set was making calls that involved objects removed by Shopify in their REST Admin API. This has been corrected.
- The CSM for Shopify default automation record data load had the **Auto Post SO** field enabled for multiple *BUILDSALESORDER* functions, resulting in the potential for inadvertent sales order posting in new installations. This has been corrected.
- If a retrieved channel order resulted in the automatic creation of a sales credit memo, deleting that channel order and re-retrieving it would instruct CSM to generate a second credit memo. 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 Shopify's automated test scripts have been expanded to include additional testing scenarios.
- CSM for Shopify's default demo data load has been updated to support new features introduced with this release.

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 Shopify platform:

- Shipping Methods
- Shipping Carriers

Retrieving Shipping Methods

By default, Shopify supports a number of standard delivery methods, and it is not possible for Shopify users to manually set up new records.

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

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

CSM creates new CSM shipping method records based on the default methods that are supported by Shopify. 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 Shopify.*

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, Shopify common carriers such as DHL, FedEx, UPS, and USPS. In addition to these common carriers, Shopify supports a number of other carriers that are popular in different areas of the world.



Supported carriers are determined by Shopify and not subject to expansion or change; it is not possible for Shopify users to manually set up new records..

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

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

CSM creates new CSM shipping carrier records based on the default methods that are supported by Shopify. 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 Shopify.*

Gift Cards

It is possible to retrieve and issue Shopify gift cards from a CSM sales channel in Business Central.

Setup

A new Gift Card FastTab has been added to the CSM Sales Channel page. Here you can enter the default G/L accounts to which gift card amounts will be posted:

- **Default Gift Card Account:** Enter or use the AssistButton to select the default general ledger account to which newly-issued gift card amounts will be posted. When a new gift card is being issued from within Business Central, the application will suggest this account by default, although it can be manually changed, if necessary. This would typically be a cash account.
- **Default Gift Card Balancing Account:** Enter or use the AssistButton to select the default general ledger account to which the balancing entry for newly-issued gift card amounts will be posted. When a new gift card is being issued from within Business Central, the application will suggest this balancing account by default, although it can be manually changed, if necessary. This would typically be a liability account.

Managing Gift Cards

To view information about a Shopify channel's gift cards, choose the **Related** ribbon, then choose the **Gift Cards** action. This will open a page that presents any gift cards that have been issued for the channel. Information about each gift card is presented on each line, including the gift card's unique ID, starting and remaining balance, and dates of expiration or disablement. Filter options at the top of the page allow you to include or exclude zero balance, expired, and disabled gift cards from the list.



To retrieve active gift cards from your Shopify platform, choose the **Actions** ribbon, then choose the **Retrieves Active Gift Cards** action. CSM will retrieve all active gift cards from Shopify. Subsequent updates to gift cards will be communicated through CSM's automation routines.

You can also issue new gift cards directly from the **Gift Cards** page in Business Central:

1. Choose the **Issue Gift Card** action in the ribbon.
2. In the **General** FastTab on the **Gift Card** page, specify the initial amount, expiration date, and, if desired, any additional notes regarding the gift card.
3. If you have defined gift card posting accounts for the Shopify sales channel, the **Post to GL** field on the **Posting** FastTab will be automatically enabled. It is recommended that this stay enabled, but you can manually disable it, if necessary.
4. Choose the **OK** button.

CSM will generate a new gift card and present a confirmation message that contains the gift card's unique code.

Note: *the full content of the gift card code will only be available one time in this confirmation message. Once this message is closed, it will no longer be possible to obtain this full code. This is in line with Shopify's native workflow; if you issue a gift card from the Shopify administrative portal, its code can only be obtained one time at the initial time of issue.*

5. Choose the **OK** button to close the confirmation message.

The **Gift Cards** page will be updated with a new line for the issued gift card.

Release Objects

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

Object Type	Object ID	Object Name	Action
Page	70338376	CSM Shopify Setup Wizard	Modified
Codeunit	70338375	CSM Shopify Utility Functions	Modified
Codeunit	70338376	CSM API Shopify Processing	Modified
Codeunit	70338377	CSM Shopify Response Mgt	Modified
Codeunit	70338379	CSM Shopify Data Load	Modified
Codeunit	70338395	CSM Shopify Test	Modified
Codeunit	70338396	CSM Shopify Test Library	Modified
PermissionSet	70338375	CSM SHOPIFY	Created



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	70338377	CSM Order Shopify	Modified	CSM Order
PageExtension	70338378	CSM Sales Channel Shopify	Modified	CSM Sales Channel
PageExtension	70338379	CSM Listing Shopify Additions	Modified	CSM Listing
PageExtension	70338381	CSM Order Documents Shopify	Modified	CSM Order Documents
PageExtension	70338382	CSM Shipping Carriers Shopify	Created	CSM Shipping Carriers
PageExtension	70338383	CSM Shipping Methods Shopify	Created	CSM Shipping Methods
PageExtension	70338386	CSM Order Header Arch. Shopify	Created	CSM Order Archive

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"> • OnBeforeCaptureCSMOrderAuthorizedPayment(var • OnAfterCaptureCSMOrderAuthorizedPayment(var • OnCaptureCSMOrderAuthorizedPaymentOnBeforeCapturePayment(var • OnBeforeIsPaymentReadyToBeCaptured(var • OnBeforeCapturePayment(var • OnCapturePaymentOnBeforeShopifyPostandApplyPaymentDocumen(var • OnBeforeCSMOrderDocumentCalculateAmountToCapture(var • OnAfterCSMOrderDocumentCalculateAmountToCapture(var • OnBeforeCSMOrderHeaderCalculateAmountToCapture(var • OnAfterCSMOrderHeaderCalculateAmountToCapture(var
Codeunit	70338376	CSM API Shopify Processing	<ul style="list-style-type: none"> • OnBeforeGetCredential(CSMAPIFunction: • OnAfterGetCredential(CSMAPIFunction: • OnBeforeAddHeaderVariables(var • OnAfterAddHeaderVariables(var