



Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager for Magento

Release: 3.0

Version: 3.0.2022091320.56297

Release Date: 09/13/2022

Minimum Business Central Version Compatibility: 19.0

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.

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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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

- Support for Microsoft Dynamics 365 Business Central 2022 Wave 1 (version 20) has been added to CSM for Magento.
- Magento-specific accommodations have been made to support the **Role Center Headline Data** table that was added in a previous version of CSM Core. Starting with this release of CSM for Magento, Magento-specific headlines are stored in this table and are available for display in the **CSM Administrator** Role Center.
- Supporting data retrieval has been added for the following data types
 - Payment Methods
 - Inventory Locations



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

- Order retrieval automation now retrieves payment intent information from Stripe.
- It is now possible to create CSM listings with product data that has been retrieved from a connected Magento platform. This is useful if you have already created products in Magento, and would prefer to use this external platform, rather than Business Central, as the basis for your CSM listings. 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.
- Configurable item support has been added to CSM for Magento. Configurable items refer to products that are available in multiple, variable configurations such as color or size. CSM for Magento accommodates the creation and management of this item structure:
 - The CSM listing wizard identifies items that exist as “parents” to multiple “children” records in Business Central which represent different configurable item combinations and creates multiple CSM listings that reflect this parent/child relationship.
 - CSM listings for both the parent and children can be exported from Business Central and used to create new records in Magento.
 - Updates to configurable attribute values can be used to create new CSM listings and then communicated to Magento.
 - Configurable items can be loaded from Magento and used to create CSM listing records in Business Central.

See the [in-depth feature description](#) for more details.

Corrections

- The correct Magento store ID was not being retrieved when the corresponding API credential record’s API scope was set to <store>. This has been corrected.
- Product images sent to Magento were not being displayed according to the setting in the **Use as Media Image** field on that image’s product information card in Business Central. This has been corrected.

Miscellaneous

- CSM for Magento’s automated test scripts have been expanded to include additional testing scenarios.
- CSM for Magento’s default demo data load has been updated to store demo credentials in Azure Key Vault.
- CSM for Magento’s subscription management objects have been updated to include supported extension modules.

In-Depth Features

Supporting Data Retrieval

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


- Payment Methods
- Inventory Locations



Retrieving Payment Methods

CSM allows you to retrieve Payment Methods into Business Central from an integrated Magento platform. CSM payment methods correspond to “payment method” records in Magento. Magento uses this record type to represent all payment scenarios, including generic ones such as credit cards, bank accounts, and checks, as well as specific payment processes, such as Stripe and Braintree. Although extensions exist to add payment methods beyond these provided defaults, it is not possible for Magento users to manually set up new records.

You can automatically load new CSM payment method records that are based on Magento’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 payment methods.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Payment Methods** action.
4. In the **CSM Payment Methods** window, choose the **Actions** ribbon, then choose the **Retrieve Payment Methods** action.


CSM creates new CSM payment method records based on the default methods that are supported by Magento. If CSM is able to identify a Business Central payment method code that is identical to a CSM payment method record’s external ID, it will automatically link these records by assigning the value in the Payment Method Code field. If CSM cannot identify a payment method code that matches a CSM payment method external ID, a new payment method code will be created and assigned to the CSM payment methods.

5. To provide additional instructions as to how CSM should process orders to which a given payment method is assigned, fill in the fields as follows:
 - **Automatic Application:** enter a check mark in this field to instruct CSM to automatically apply payments that are recorded for the payment method to the associated Business Central sales invoice or credit memo.
 - **Single Capture:** enter a check mark in this field to instruct CSM to permit only a single payment capture activity against this payment method.
 - **Perform Invoice Capture:** enter a check mark in this field to instruct CSM to automatically perform and send a capture transaction (such as a credit card settlement) to the external channel following the transmission of invoice activities recorded for the payment method.
 - **Perform Capture for Zero Amt:** enter a check mark in this field to instruct CSM to automatically perform and send a capture transaction to the external channel following the transmission of invoice activity when an invoice amount is zero recorded for the payment method.

Note: *the functionality to load CSM payment 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 payment method records in Business Central.*

Retrieving Inventory Locations

You can instruct CSM to retrieve inventory locations from Magento. As part of this process, the external ID value for each CSM inventory location is automatically populated, making this a quick and easy way to set up CSM inventory locations. Once these locations have been retrieved, they can be mapped to Business Central locations.

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 retrieve inventory locations.
3. Choose the **Related** ribbon, then select the **Setup** menu and choose the **Inventory Locations** action.
4. In the **CSM Inventory Locations** window, choose the **Actions** ribbon, then choose the **Retrieve Inventory Locations** action.

CSM retrieves location records from the sales channel's connected Magento store and creates new CSM inventory locations records for each one.

5. In the **Location Code** field, enter or use the AssistButton to map a Business Central location to the CSM inventory location.
6. If you want CSM to use inventory from the location as part of availability calculations, place a check mark in the **Incl in Inventory Calculation** field.

Loading CSM Listings from Magento Data

It is possible to import product information from your connected Magento platform into Business Central, then create CSM listings from this data. You can then link these CSM listings to Business Central items. This is useful if you have already created products on your Magento platform, and would prefer to use this external platform, rather than Business Central, as the basis for your CSM listings.

***Note:** the process of importing listing information from Magento and into Business Central is meant to assist in the initial setup of your CSM listing management module. For the ongoing maintenance of products between platforms, we recommend using Business Central as the primary source and then exporting data to Magento.*

To load listings from Magento:

1. Open the CSM sales channel that represents your Magento platform.
2. Choose the **Related** ribbon, then select the **Setup Actions** menu and choose the **Load Products From Channel** action.
3. On the **Get Listings from Channel** page, confirm the correct sales channel has been selected, then choose the **OK** button.

CSM will import product data from Magento and create a separate CSM listing record for each product. The external ID for each listing will be populated with the unique identification number assigned by Magento.

4. Open each CSM listing, and on the **General** FastTab, enter the corresponding Business Central item number in the **No.** field to link the CSM listing to an item.

***Note:** you can automate this linkage prior to loading items from Magento by assigning the product's channel item SKU as one of the Business Central item's item identifiers. When CSM creates a new listing with data from Magento, it will determine if any Business Central items have an item identifier that shares that listing's channel item SKU; if it can find a match, it will assign the item to the new listing.*

The load products from channel action does not retrieve attribute sets or attributes from Magento. If you wish to maintain this information on the listings that you have created from Magento data, you must manually assign these values:

1. Open the CSM listing to which you want to assign attributes.
2. On the **Listing** FastTab, enter or use the AssistButton in the **Channel Item Attribute Set** field to assign an attribute set to the listing.
3. Choose the **Actions** ribbon, then select the **Data** menu and choose the **Synchronize Item Attributes** action.

CSM will assign attributes and attribute values to the listing based on the assigned attribute set and Business Central item. These attributes are presented in the **CSM Listing Attribute** List FastTab.

Configurable Items


Depending on your business, you may include configurable items as part of your product portfolio. A configurable item is an item that you offer in different variants based on variable attributes or characteristics.

For example, assume we are a company that sells apparel. We sell a t-shirt item in three colors (red, blue, and yellow) and three sizes (small, medium, and large), resulting in nine possible configurations. While we need to account for these nine variants in some manner, from a listing perspective we want to list just the top-level t-shirt item, then allow buyers to select their preferred color and size from the listing page.


You can use CSM's item variations module to define an item's variable characteristics (using our example above, these would be color and size), then create additional items or item variants that represent the different configurations of these characteristics. You can also use this variation framework to create CSM listings; if you use the CSM listing wizard to create a new listing for the top-level or "parent" item, CSM will automatically create CSM listings for any "children" items or item variants that have been selected for inclusion in the CSM listing creation process.

Setup

The configurable item features in CSM utilize an updated item attribute structure that stores different attribute data types in separate tables. If you wish to create CSM listings for configurable items, you must enable this structure for the relevant sales channel:

1. Choose the  icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the sales channel for which you want to create configurable items.
3. On the **Listing Management** FastTab, enable the **Enable New Attribute Design** field and the **Use Shared Item Attribute** field.

Configurable item listings also use the item variations module as the basis for listing creation. Accordingly, you must configure an item variation's SKUs:

1. Choose the  icon, enter **Item Variations**, and then choose the related link.
2. Open the item variation for which you want to create configurable items.
3. On the **SKUs** FastTab, fill in the following values for each variation SKU that will have a CSM listing:
 - **SKU:** enter a value that identifies the variation SKU as a unique record. This value will be assigned as the channel item SKU on newly-created CSM listings.
 - **SKU Status:** SKUs are initially created with a status of *Pending*, but if you intend to create CSM listings based on a configurable item's variations, you must update the status on the relevant variation SKU lines to either *Active* or *No Replenish*.



Configurable Item Listings

The process of creating CSM listings for configurable items is no different than the process of creating CSM listings for non-configurable or simple items:

1. Open the CSM sales channel record for which you want to create listings.
2. Choose the **Related** ribbon, then select the **Listing** menu and choose the **Wizard** action in the **Create Listing** group.
3. On the first page of the wizard, enter or use the lookup in the **Item No.** field to assign the parent, or top-level Business Central item.

***Note:** if you are creating CSM listings for a configurable item whose variations exist as item variants, do not populate the **Variant Code** field in the listing wizard. If you assign a specific variant code, the listing wizard will create a single CSM listing for that item variant. If you leave the **Variant Code** field blank, the listing wizard will create CSM listings for all variants.*

4. Choose the **Next** button.
5. In the **Sales Channel SKU** field, enter a value that will identify the CSM listing as a unique record for the CSM sales channel. By default, CSM will assign a SKU in this field based on the values that were entered on the first page of the wizard, but you can modify this, if desired.
6. Choose the **Next** button.
7. Choose the **Finish** button.

New CSM listings are created for the top-level parent item and the item/variant “children” that represent different configurable variations. The assigned product type for these CSM listings differs between parents and children:

- Parent listings have an assigned channel product type of *Configurable*.
- Child listings have an assigned channel product type of *Simple*.

As part of this record creation, the parent/child relationship is maintained between these listings. You can view this relationship by opening the CSM listing that represents the parent item and reviewing the **CSM Listing Children List** FastTab. This FastTab presents all of the CSM listing records that exist as children to the parent. This FastTab will be empty on the child listings.

Configurable Item Attributes

The CSM listing wizard will automatically assign an attribute set to newly-created CSM listings based on the item category that is assigned to the related item. The listing wizard will also assign item attributes to the listing from multiple sources:

- CSM item attributes that are defined as part of the assigned attribute set.
- Item variation options that are defined as part of the item or variant’s item variation. If the item variation option does not have a corresponding CSM item attribute, CSM will automatically create a new one as part of this process.

Static or non-configurable attribute values are displayed consistently across all CSM listing types. However, the manner in which listing attributes for configurable attributes are presented differs between parent and children listings. On the **CSM Listing Attribute List** FastTab for the parent listing, a separate line will be presented for each configurable attribute that is used to define item variations. The attribute value on these lines, however, will remain blank. The **CSM Listing Attribute List** FastTab on child listings will include a line for each attribute, as well as the attribute values that are assigned to that particular child.



If we revisit our earlier example where we have a top-level t-shirt item and children that vary by color and size, the **CSM Listing Attribute List** FastTab on the parent listing would present separate lines indicating that color and size are that listing's configurable attributes. The **CSM Listing Attribute List** FastTab for the child listings would also include lines for color and size, but the value would be assigned as red, blue, small, medium, etc.

Sending Configurable Item Listings to Magento

The same setup activities and requirements that can be performed for any listing are relevant for configurable items. For example, descriptions and images can be assigned to CSM listings for configurable items. Setup activities and additional information only need to be entered for the configurable, parent item.

The process of sending a configurable item to Magento does not vary from the process of sending a standard, simple item. From the CSM listing for the configurable, parent item, choose the **Actions** ribbon, then choose the **Channel Integration** menu and execute the **Send All Listing Data to Channel** function. This will send the listing for the configurable item as well as all children items to Magento. Each listing will be created as a new product in Magento based on the listing's information. Magento will assign a unique identification number to each record; these values will be retrieved by CSM and presented in the **External ID** field on the listing's **Listing Status** FastTab.

If any assigned CSM attributes do not have corresponding records in Magento, executing the **Send All Listing Data to Channel** function will also send these attributes and their values to Magento, where it is assigned to the related attribute set. Magento will assign a unique identification number to each option and option value; CSM retrieves this information and updates the relevant lines on the CSM listing's **CSM Listing Attribute List** FastTab as well as the related CSM item attributes accordingly. If you want to only update attributes and attribute sets in Magento without sending over all listing information, you can do so from the CSM listing for the configurable item by choosing the **Actions** ribbon, then choosing the **Channel Integration** menu and executing the **Send Configurable Options to Channel** function.

Product Listing Availability

The process of updating Magento with a product listing's availability is no different for configurable items as other listings. You can calculate channel availability for CSM listings for child items, then send this information to Magento. The stock quantities for the relevant product variants are updated accordingly.

Updating Configurable Option Values

It may be that you wish to add configurable option values over time. For example, suppose we have a configurable option called "Color" set up in Business Central, with option values of Red, Blue, and Yellow. At some point, we want to add Green to this list of option values. In this scenario, it is necessary to update a number of records:

Create and Explode New Item Variation SKUs

If you are using the item variations framework to manage your configurable items, you must add the new item variation option value, then use this information to create a new item or item variant in Business Central:

1. Open the item variation that you want to update.
2. Add the new item variation option value to the desired option. The way you enter this information depends on whether the item variation option is linked to a Business Central item attribute.
3. On the **Item Variation Card** page, choose the **Actions** ribbon, then choose the **Create Item Variation SKUs** action. The system will enter new lines for the new configurable option value in the **SKUs** FastTab.
4. Choose the **Actions** ribbon, then choose the **Explode SKUs** action.
5. Choose the **OK** button.



Business Central records are created for the new variation SKUs.

6. Enter other variation SKU values on the line:

- **SKU:** enter a value that identifies the variation SKU as a unique record. If you intend to create CSM listings based on a configurable item's variations, you must assign a SKU on the relevant variation SKU lines.
- **SKU Status:** select a status to indicate the SKU's place in your product workflow. SKUs are initially created with a status of *Pending*, but if you intend to create CSM listings based on a configurable item's variations, you must update the status on the relevant variation SKU lines to either *Active* or *No Replenish*.

Update the CSM Item Attribute Values

Once you have added a new item variation option value, you must update the corresponding CSM item attribute accordingly:

1. Open the CSM sales channel record for which you want to update item attribute values.
2. Choose the **Related** ribbon, then select the **Listing** menu and choose the **Channel Item Attributes** action.
3. Select the CSM item attribute you want to update, then choose the **Edit** action in the ribbon.
4. Choose the **Actions** ribbon, then select the **Data Synch** menu and choose the **Synch Option Values** action.

Newly-added attribute values will be added to the **Item Attribute Options** FastTab.

Create New CSM Listings and Send Information to Magento

A CSM listing must be created for each new item variant that has been added to the list of the configurable item's children:

1. Open the CSM sales channel record for which you want to update item attribute values.
2. Choose the **Related** ribbon, then select the **Listing** menu and choose the **Channel Listings** action.
3. Open the top-level parent configurable item listing you want to update.
4. Choose the **Actions** ribbon, then select the **Data** menu and choose the **Synchronize Item Variations** action.

New CSM listings will be created for the newly-added attribute value. These listings will be added to the lines on the configurable item's **CSM Listing Children List** FastTab.

Now that you have updated the CSM item attributes and CSM listings, you can send this information to Magento:

1. From the CSM listing for the configurable, parent item, choose the **Actions** ribbon, then choose the **Channel Integration** menu and execute the following functions in order:
 - **Send Configurable Options To Channel:** this will send the new configurable option value to Magento, where it is assigned to the appropriate attribute record. This information is assigned to the Magento product and can be viewed in the **Variations** section of the Magento product record. Magento will assign a unique identification number to the option value; CSM retrieves this information and updates the relevant lines on the CSM listing's **CSM Listing Attribute List** FastTab as well as the related CSM item attributes accordingly.
 - **Send Config Children To Channel:** this will send the new listings to Magento, where they can be created as new products. Magento will assign a unique identification inventory and SKU number to each record; these values will be retrieved by CSM and presented in the **External ID** field on the listing's **Listing Status** FastTab.

Retrieving Configurable Items from Magento

Executing the [load products from channel action](#) for a sales channel retrieves all products from the connected eCommerce platform and creates corresponding CSM listings in Business Central. This includes any configurable items that you have set up in Magento. For each retrieved configurable item, CSM listings are created for the top-level parent configurable item as well as each child variation.



As with any CSM listing that is retrieved from Magento, it is necessary for you to associate configurable item listings to Business Central items or variants by using the **Type** and **No.** fields on the **General** FastTab to select the relevant record. The load products from channel action does not retrieve attribute sets or attributes from Magento. If you wish to maintain this information on the listings that you have created from Magento data, you must manually assign these values:

1. Open the CSM listing to which you want to assign attributes.
2. On the **Listing** FastTab, enter or use the AssistButton in the **Channel Item Attribute Set** field to assign an attribute set to the listing.
3. Choose the **Actions** ribbon, then select the **Data** menu and choose the **Synchronize Item Attributes** action.

CSM will assign attributes and attribute values to the listing based on the assigned attribute set and Business Central item. These attributes are presented in the **CSM Listing Attribute** List FastTab.

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	51000	CSM Magento Test Install	Created
Codeunit	51001	CSM Magento Test	Created
Codeunit	51002	CSM Magento Test Library	Created
Codeunit	51003	CSM Magento2 Test	Created
Codeunit	51004	CSMMagentoTestAzureFunction	Created
Codeunit	70338300	CSM Magento Utility Functions	Modified
Codeunit	70338301	CSM API Magento Processing	Modified
Codeunit	70338303	CSM Stripe Integration Magento	Created
Codeunit	70338304	CSM Magento Data Load	Modified
Codeunit	70338305	CSM API Magento M2 Processing	Modified
Codeunit	70338306	CSM Magento M2 Response Mgt	Modified
Codeunit	70338307	CSM Magento Upgrade	Created
Codeunit	70338308	CSM Magento Product Management	Created
PermissionSet	70338300	CSM Magento	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	70338300	CSMSetupMagentoAdditions	Modified	CSM Setup
PageExtension	70338310	CSM Sales Channel Magento Ext	Modified	CSM Sales Channel



Integration Events

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

Object Type	Object ID	Object Name	Integration Events
Codeunit	70338308	CSM Magento Product Management	<ul style="list-style-type: none">• OnBeforeAssignMissingListingLink(var• OnAfterAssignMissingListingLink(var• OnGetAPIFunctionForSubmitProdChildrenToChannelOperation(var• OnAfterSubmitProductChildrenToChannelOperation(var