



# Suite Engine Channel Sales Manager Release Notes

**Product:** Channel Sales Manager for WooCommerce

**Release:** 3.0

**Version:** 3.0.2022101221.59046

**Release Date:** 10/12/2022

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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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

- WooCommerce-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 WooCommerce, WooCommerce-specific headlines are stored in this table and are available for display in the **CSM Administrator** Role Center.
- In a previous release of CSM for WooCommerce, the ability to define a time zone offset was moved from CSM API sets to CSM sales channels. As a result, the **CSM Shop Timezone UTC Offset** field in the **CSM API Set** table was marked as Obsolete. This field has now been removed from the **CSM API Sets** page.



- Supporting data retrieval has been added for Payment Methods. 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 WooCommerce platform. This is useful if you have already created products on your WooCommerce platform, 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.
- Configurable item support has been added to CSM for WooCommerce. Configurable items refer to products that are available in multiple, variable configurations such as color or size. CSM for WooCommerce 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, as well as variable item attributes, can be exported from Business Central and used to create new records in WooCommerce.
  - Updates to configurable attribute values can be used to create new CSM listings and then communicated to WooCommerce.
  - Configurable items can be loaded from WooCommerce and used to create CSM listing and item attribute records in Business Central.See the [in-depth feature description](#) for more details.
- WooCommerce-specific accommodations have been made to support a CSM Core feature that allows users to edit a CSM API message’s response and then reprocess it. See the [in-depth feature description](#) for more details.

## Corrections

- The presence of CSM for WooCommerce in a database was suppressing the display of shipping method and shipping carrier retrieval actions on sales channels for other eCommerce platforms. This has been corrected.

## Miscellaneous

- CSM for WooCommerce’s automated test scripts have been expanded to include additional testing scenarios.
- CSM for WooCommerce’s subscription management objects have been updated to include supported extension modules.

## In-Depth Features

### Payment Method Data Retrieval

CSM allows you to retrieve Payment Methods into Business Central from an integrated WooCommerce platform. WooCommerce 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 PayPal. Although extensions exist to add payment methods beyond these provided defaults, it is not possible for WooCommerce users to manually set up new records.

You can instruct CSM to retrieve payment methods from WooCommerce and automatically create corresponding CSM 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 retrieve 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 retrieves payment methods from the sales channel's connected WooCommerce store and creates new CSM payment method records for each one.

5. In the **Payment Method Code** field, use the AssistButton to assign a Business Central payment method code to the payment method.
6. 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.

## Loading CSM Listings from WooCommerce Data

It is possible to import product information from your connected WooCommerce 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 WooCommerce 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 WooCommerce 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 WooCommerce.*

To load listings from WooCommerce:

1. Open the CSM sales channel that represents your WooCommerce 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 WooCommerce 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 WooCommerce.

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 WooCommerce 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 WooCommerce, 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.

## 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.

In addition, you must have sent your configurable item attributes to WooCommerce and created the relevant links before you create CSM listings for these records in Business Central:

1. Choose the  icon, enter **CSM Sales Channels**, and then choose the related link.
2. Open the sales channel for which you want to send attributes to WooCommerce.
3. Choose the **Related** ribbon, then select the **Listing** menu and choose the **Channel Item Attributes** action.
4. Create **Item Attributes** with option types or link the attribute you wish to create with values that already exist for an existing item attribute.
5. Select the item attribute you want to send to WooCommerce, then choose the **Edit** action in the ribbon.
6. On the CSM item attribute card, enable the **Used for Configurable** Boolean, if it is not already active.
7. Choose the **Actions** ribbon, then choose the **Send to Channel** action in the **Channel Integration** menu.

CSM will send the attribute to WooCommerce, where new records will be created and a unique identification number will be assigned; CSM retrieves this information and updates the **External ID** field on the **Attribute Status** FastTab accordingly.

Finally, 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 variation 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 *Variation*.

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

In addition to creating the CSM listing records themselves, the listing wizard will automatically assign CSM item attributes for the variable attributes that differentiate the children listings. 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 WooCommerce

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.

***Note:** CSM attributes for configurable items must be [linked to corresponding records in WooCommerce](#) before the CSM listings can be sent to the channel.*

It is necessary to perform three separate data export activities to properly send a configurable item, its variable options and their values, and the configurable children records to WooCommerce. All three actions can be performed 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 Listing Base Info to Channel:** this will send basic information about the configurable item to WooCommerce. A new product will be created in your WooCommerce platform based on the listing's information. WooCommerce will assign a unique identification number to this record; this value will be retrieved by CSM and presented in the **External ID** field on the listing's **Listing Status** FastTab.
- **Send Configurable Options To Channel:** this will send the listing's configurable options and their values to WooCommerce. This information is assigned to the WooCommerce product, and can be viewed in the **Attributes** section of the WooCommerce product record. If corresponding attributes did not already exist in WooCommerce, they will be created and WooCommerce 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.
- **Send Config Children To Channel:** this will send the listing's children to WooCommerce, where they can be viewed in the **Variations** section of the WooCommerce product record. These children are not created as separate WooCommerce products, but rather variants of the original, top-level item. WooCommerce will assign a unique SKU number to each configurable child; this value will be retrieved by CSM and presented in the **External SKU ID** field on the child listing's **Inventory Information** FastTab.

WooCommerce will assign a unique identification SKU number to each configurable child; these values will be retrieved by CSM and presented in the **External SKU ID** fields on the child listing's **Inventory Information** FastTab

### Product Listing Availability

The process of updating WooCommerce 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 WooCommerce. 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 manner in which 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 WooCommerce*

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 WooCommerce:

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 WooCommerce. This information is assigned to the WooCommerce product and can be viewed in the **Variations** section of the WooCommerce product record. WooCommerce will assign a unique identification number to each 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 WooCommerce, where they can be viewed in the **Attributes** section of the WooCommerce product record. These children are not created as separate WooCommerce products, but rather variants of the original, top-level item. WooCommerce will assign a unique identification SKU number to each configurable child; these values will be retrieved by CSM and presented in the **External SKU ID** field on the child listing's **Inventory Information** FastTab.

### Retrieving Configurable Items from WooCommerce

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 WooCommerce. CSM creates a number of different records in Business Central for each retrieved configurable item:

- CSM listings are created for the top-level parent configurable item as well as each child variation.
- CSM listing attributes are created for the configurable item's variable attributes. These attributes are assigned to the newly-created CSM listing records.

As with any CSM listing that is retrieved from WooCommerce, 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. It is also possible for you to retrieve configurable attributes and children from WooCommerce for an existing CSM listing. The listing must have the following values:

- **Channel Product Type:** this is set to *Configurable*.
- **External ID:** this is populated with a value that connects the listing to a WooCommerce product.

Choose the **Actions** ribbon, then choose the **Retrieve Information from Channel** menu and execute the following functions in order:

- **Get Configurable Attributes:** this retrieves the product's configurable attributes and their values. New CSM listing attributes are created for these records. In addition, these attributes are assigned to the configurable CSM listing.
- **Get Variants for Listing:** this retrieves the configurable variations that exist for the product in WooCommerce. These variations are entered as separate CSM listings in Business Central. These listings are structured as children of the top-level parent configurable listing. The relevant attributes and their values will also be assigned to each new CSM listing.

### Reprocessing CSM API Messages

There may be scenarios in which it is necessary to reprocess an API message response. For example, a connectivity issue might create an issue with an API message as it is being processed, leading to an incomplete activity. In such a scenario, the message may need to be edited and then reprocessed.

To edit and reprocess an API message:



1. Choose the  icon, enter **CSM API Messages**, and then choose the related link.
2. Choose the CSM API message record you want to edit and reprocess. You can only edit CSM API messages with a message status of *Response*.
3. Choose the **Actions** ribbon, then choose the **Edit Response Message** action. This action will only be visible for CSM API messages with a message status of *Response*.
4. In the **CSM Reprocess API Message** window, make the necessary changes to the CSM API message's response text.
5. Choose the **Actions** ribbon, then choose the **Reprocess** action.

CSM will reprocess the CSM API message according to the new response information. If the record is successfully processed, its status will be updated accordingly.

## Release Objects

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

Object Type	Object ID	Object Name	Action
Codeunit	70338400	CSM API WooCommerce Processing	Modified
Codeunit	70338401	CSM Stripe Integration WooComm	Modified
Codeunit	70338402	CSM WooCommerce Data Load	Modified
Codeunit	70338403	CSM WooCommerce Response Mgt	Modified
Codeunit	70338404	CSM WooCommerce Upgrade	Modified
Codeunit	70338405	CSM WooComm Utility Functions	Modified
Codeunit	70338406	CSM WooCommerceAPIProcessing	Modified
Codeunit	70338407	CSM WooCommerce Product Mgmt	Modified
Codeunit	70338408	CSMWooTestAzureFunctions	Created
Codeunit	70338409	CSM WooComm Define UpgradeTags	Created
Codeunit	70338421	CSM WooCommerce Test	Created
Codeunit	70338423	CSM WooCommerce Test Library	Created
PermissionSet	70338400	CSM WooCommerce	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	70338402	CSM Sales Channel WooCommerce	Modified	CSM Sales Channel
PageExtension	70338403	CSMSetupWooCommerceAdditions	Modified	CSM Setup
PageExtension	70338406	CSMAPISetWooCommerceAdd	Modified	CSM API Sets
PageExtension	70338407	CSM Shipping Methods WooComm	Modified	CSM Shipping Methods
PageExtension	70338410	CSM Shipping Carriers WooComm	Modified	CSM Shipping Carriers
PageExtension	70338411	CSM Payment Methods Woo	Created	CSM Payment Methods



## Integration Events

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

Object Type	Object ID	Object Name	Integration Events
Codeunit	70338403	CSM WooCommerce Response Mgt	<ul style="list-style-type: none"><li>• OnAfterGeneralListResponse(CSMAPIMessage:</li></ul>
Codeunit	70338407	CSM WooCommerce Product Mgmt	<ul style="list-style-type: none"><li>• OnBeforeBuildCSMParameterChildrenItemAttributes(var</li></ul>