



Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager Core

Release: 3.3

Version: 3.3.2022112221.63058

Release Date: 11/22/2022

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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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 2 (version 21) has been added to CSM.
- An **Address 2 Behavior** field has been added to the **CSM Sales Channel** table. This field allows you to instruct CSM how to populate address 2 fields on new sales orders and customers based on related CSM order values. Because CSM orders have three address fields, while Business Central sales orders and customers only have two, it is necessary to indicate which CSM order address fields should be used to populate Business Central address 2 fields. You can instruct CSM to use a CSM order's address 2 field, address 3 field, or combine both address 2 and address 3 fields into a single value.
- A new sales operation rules feature has been added to CSM Core. This functionality allows you to allow or deny actions from being performed against documents when certain criteria is met. For example, you could instruct



CSM to deny the automatic release of a sales order if any item order quantities have insufficient availability. See the [in-depth feature description](#) for more details.

Corrections

- A number of CSM objects had code that was not in compliance with Microsoft's published guidelines. This has been corrected.
- JSON response processing would error during the order automation process if no new orders were available for retrieval. This has been corrected.
- Attempting to send feeds to Amazon would result in an unsupported character message. This has been corrected.
- Archive table and page objects did not exist for CSM order document line records. This has been corrected.
- Attempting to manually enter a CSM channel primary category on CSM listings would result in an error. This has been corrected.

Miscellaneous

- The **FTP** FastTab on the **CSM Sales Channel** page supported functionality that is no longer used. This FastTab has been hidden by default. The underlying fields are still present and can be used, if needed.
- Miscellaneous field captions have been updated for clarity.
- CSM Core's automated test scripts have been expanded to include additional testing scenarios.

In-Depth Features

CSM Sales Operation Rules

CSM makes it possible for you to design a channel order handling process that enforces your business policies and workflows by allowing you to define sales operation rules.

When channel orders are retrieved from an external platform, CSM can be instructed to automatically create sales documents from these records. The application can also be configured to automatically release and post these Business Central documents. By using CSM's sales operation rules, you can establish criteria that will override a channel's standard automation routines. For example, you might want CSM to automatically release sales orders that are created for your eCommerce channel, except when an order includes an item or items with insufficient inventory. In this scenario, you can implement a sales operation rule instructing CSM to deny the automatic release of sales orders whose item quantities exceed availability.

Note: CSM sales operation rules only apply to activities that are performed by CSM. Using the previous example of a rule that would deny the automatic release of sales orders whose item quantities exceed availability, this rule would not prohibit a user from manually releasing such a sales order.

CSM includes out-of-the-box default rules that address two scenarios:


- **Unbalanced Totals:** a discrepancy exists between the order totals on a channel order and the related Business Central sales document.
- **Insufficient Inventory:** the quantity of an item on a retrieved order exceeds availability.





In addition, this feature is designed to allow for the easy implementation of [custom rules](#) that reflect your particular business processes.

To load the default rules that are included with CSM:

1. Choose the  icon, enter **CSM Setup**, and then choose the related link.
2. Choose the **Related** ribbon, then choose the **CSM Sales Operation Rules** action.
3. In the **CSM Sales Operation Rules** window, choose the **Actions** ribbon, then choose the **Load Default Rules** action.

CSM loads the default sales operation rules that are included with the application. Each rule is assigned a unique rule code that addresses a different combination of scenario, processing action, and Business Central document type. All of CSM's default sales operation rules are configured to deny an order processing action for the assigned document type if the scenario's conditions are met (for example, deny the automatic release of a sales order if any item order quantities have insufficient availability, or deny the automatic posting of a sales order if a discrepancy exists between the order totals on a channel order and the related Business Central sales document).

If you wish to enforce a rule, you must enable it:

4. Choose the CSM sales operation rule you want to enable, then place a check mark in the **Enabled** field.
5. If you have multiple CSM sales channels set up in Business Central and want to enable the sales operation rule for a specific one, enter or use the lookup in the **Sales Channel Code** field to assign the desired channel. If the **Sales Channel Code** field is left blank, the rule will apply to all channels.

***Note:** if you want to enable a sales operation rule for more than one (but not all) channels, you must manually create additional CSM sales operation rule lines for each channel.*

The other settings on the CSM sales operation rules lines should not be modified, as they are pre-configured to perform specific activities.

CSM Sales Operation Rule Functions

Each scenario that is addressed by CSM sales operation rules is designed as a separate action processing function. These functions are contained within a codeunit that is identified as a unique "sales operation rule evaluator." CSM's out-of-the-box functionality includes a *CSM Sales Operation Rules Mgt.* rule evaluator that comprises the processing functions for its default scenarios.

Using this structure, it is possible for you to extend the capabilities of CSM sales operation rules to meet your specific business processes by creating custom codeunits with additional functions.

As an example, suppose we added a custom "Approval Code" field to the sales order table, and as part of our company's workflow, we want to enforce the assignment of an approval code on all sales orders. In this scenario, we could create a new function that instructs CSM to deny processing actions for orders with a blank approval code. This and other functions would be included as part of a new, custom sales operation rule evaluator, which could then be assigned to CSM sales operation rule lines.



The creation of new CSM sales operation rule functions and evaluators does require development activity; if you want to add new sales operation rules to your CSM solution, please consult your CSM partner for assistance.

Release Objects

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

Object Type	Object ID	Object Name	Action
Table	70338202	CSM API Function	Modified
Table	70338203	CSM API Variable	Modified
Table	70338206	CSM API Mapping	Modified
Table	70338207	CSM API Message	Modified
Table	70338208	CSM API Data Buffer	Modified
Table	70338212	CSM Product Information	Modified
Table	70338213	CSM Order Header Archive	Modified
Table	70338215	CSM Sorting Table	Modified
Table	70338219	CSM Order Archive Document	Modified
Table	70338220	CSM Sales Channel	Modified
Table	70338221	CSM Order Header	Modified
Table	70338222	CSM Order Line	Modified
Table	70338223	CSM Order Document	Modified
Table	70338225	CSM Customer	Modified
Table	70338228	CSM Payment Method	Modified
Table	70338235	CSM Channel Category	Modified
Table	70338236	CSM Attribute Data	Modified
Table	70338237	CSM Inventory Location	Modified
Table	70338240	CSM Listing	Modified
Table	70338242	CSM Listing Attribute	Modified
Table	70338243	CSM API Credential	Modified
Table	70338245	CSM API Shared Session	Modified
Table	70338246	CSM Item Attribute	Modified
Table	70338247	CSM Item Attribute Option	Modified
Table	70338248	CSM Item Attribute Set	Modified
Table	70338256	CSM Sales Operation Rule	Created
Table	70338257	CSM Sales Oper. Rule Function	Created
Table	70338260	CSM Order Archive Doc. Line	Created
Page	70338200	CSM Setup	Modified
Page	70338202	CSM API Functions	Modified
Page	70338209	CSM API Data Buffers	Modified



Object Type	Object ID	Object Name	Action
Page	70338212	CSM Product Information Card	Modified
Page	70338214	CSM Order Archive Lines	Modified
Page	70338216	CSM Wizard	Modified
Page	70338219	CSM Order Archive	Modified
Page	70338220	CSM Sales Channel	Modified
Page	70338221	CSM Order	Modified
Page	70338222	CSM Order Lines	Modified
Page	70338223	CSM Order Documents	Modified
Page	70338235	CSM Channel Categories	Modified
Page	70338236	CSM Attributes	Modified
Page	70338240	CSM Listing	Modified
Page	70338241	CSM Listing Children List	Modified
Page	70338243	CSM Order Archive Documents	Modified
Page	70338245	CSM Order Document Line	Modified
Page	70338246	CSM API Credentials	Modified
Page	70338248	CSM API Credential	Modified
Page	70338249	CSM API Shared Session	Modified
Page	70338250	CSM Administrator Role Center	Modified
Page	70338252	CSM Role Center Headline	Modified
Page	70338257	CSM Listings	Modified
Page	70338261	CSM Sales Channel List Factbox	Modified
Page	70338262	CSM Product Info Image Factbox	Modified
Page	70338267	CSM Reprocess API Message	Modified
Page	70338272	CSM Gift Cards	Modified
Page	70338273	CSMGiftCard	Modified
Page	70338278	CSM API Message Headers	Modified
Page	70338281	CSM Sales Operation Rules	Created
Page	70338282	CSM Sales Oper. Rule Functions	Created
Page	70338285	CSM Order Archive Doc. Lines	Created
Codeunit	87003	CSM Request Management Test	Modified
Codeunit	87005	CSM Core Test Utility Library	Modified
Codeunit	70338200	CSM API Utility Functions	Modified
Codeunit	70338201	CSM API Buffer Management	Modified
Codeunit	70338202	CSM API Session Management	Modified
Codeunit	70338203	CSM API Request Management	Modified
Codeunit	70338204	CSM API Response Management	Modified
Codeunit	70338205	CSM Order Management	Modified
Codeunit	70338206	CSM Order Mgt Automation	Modified



Object Type	Object ID	Object Name	Action
Codeunit	70338207	CSM Listing Management	Modified
Codeunit	70338208	CSM Listing Mgt Automation	Modified
Codeunit	70338209	CSM Create Sales Order	Modified
Codeunit	70338210	CSM Stripe Integration Core	Modified
Codeunit	70338212	CSM Load Core Data	Modified
Codeunit	70338213	CSM Upgrade	Modified
Codeunit	70338214	CSM Gift Card Management	Modified
Codeunit	70338215	CSM Create Sales Credit Memo	Modified
Codeunit	70338217	CSM Sales Operation Rules Mgt.	Created
Codeunit	70338230	CSM Data Load CU Generator	Modified
Codeunit	70338231	CSM Load Demo BC Data	Modified
Enumeration	70338225	CSM Order Processing Action	Created
Enumeration	70338226	CSM Order Address 2 Behavior	Created
Enumeration	70338227	CSM Sales Oper. Rule Evaluator	Created
PermissionSet	70338200	CSM Core	Modified
Interface		CSM Sales Oper. Rule Evaluator	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
TableExtension	70338201	CSMSalesInvoiceHeader	Modified	Sales Invoice Header
TableExtension	70338204	CSM Sales Shipment Header	Modified	Sales Shipment Header

Integration Events

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

Object Type	Object ID	Object Name	Integration Events
Page	70338223	CSM Order Documents	<ul style="list-style-type: none"> OnAfterSetDefaultVisibility()
Codeunit	70338205	CSM Order Management	<ul style="list-style-type: none"> OnBeforeGetFilterForApplyingPaymentToInvoiceDocument OnBeforeApplyPaymentToInvoiceDocument OnAfterBuildCSMParameterShipmentLines OnBeforeFindCSMOrderLineForUpdatingShippingStatus OnBeforePerformManualPostAndApplyPaymentDocument
Codeunit	70338212	CSM Load Core Data	<ul style="list-style-type: none"> OnAfterLoadCSMSalesOperationRules