



Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager for Shopify

Release: 4.2

Version: 4.2.2023020921.70677

Release Date: 02/09/2023

Minimum Business Central Version Compatibility: 20.0

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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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

- The results message that is presented following the execution of the test channel communication action has been updated to provide more clear information about test results.
- Functionality has been added that allows users to generate a sales return order in Business Central from a CSM order, then post the order and send the results to Shopify, where the relevant order is updated accordingly. See the [in-depth feature description](#) for more details.

Miscellaneous

- CSM's demo data load has been updated to accommodate a new CSM Core feature that allows for the assignment of multiple Business Central locations to a single Shopify location.

In-Depth Features

Sending Return Orders from Business Central to Shopify

It is possible to initiate a return order from Business Central and then send this to the corresponding order on your external Shopify platform.

CSM Setup

It is recommended that you set up return reason codes that you can assign to the return order lines you generate for your Shopify orders. Return reasons are a standard Business Central feature that allow you to categorize and track the reasons for why items are being returned, such as "defective," "wrong item shipped," or "customer dissatisfaction." As part of setting up each reason code, you can indicate the location to which returned items will be received.

It is also necessary for you to enable refund functionality for the sales channel via the following fields on the **Order Management** FastTab of the **CSM Sales Channel** page:

- **Send Refund Cr. Memo:** enable this field to indicate that you want to send refund credit memo information from Business Central to Shopify.
- **Send Refund Cr. Memo When:** select the method by which credit memo information will be sent to Shopify.
 - *Immediate:* will send automatically when the return order/credit memo is posted.
 - *Scheduled:* will be sent when the SENDCREDITMEMO automation runs.
 - *Manual:* will be sent when the user checks the **External Requires Update** field on the CSM order document line and uses the **Send to Channel** action on the **CSM Order** page.

***Note:** the **CSM Sales Channel** page also includes **Return Order Behavior** and **Return Receipt Behavior** sections. These setup options exist for integrations to other eCommerce channels. The concept of a return order does not currently exist within Shopify, and these fields can be ignored for your Shopify channels.*

Creating and Processing Return Orders

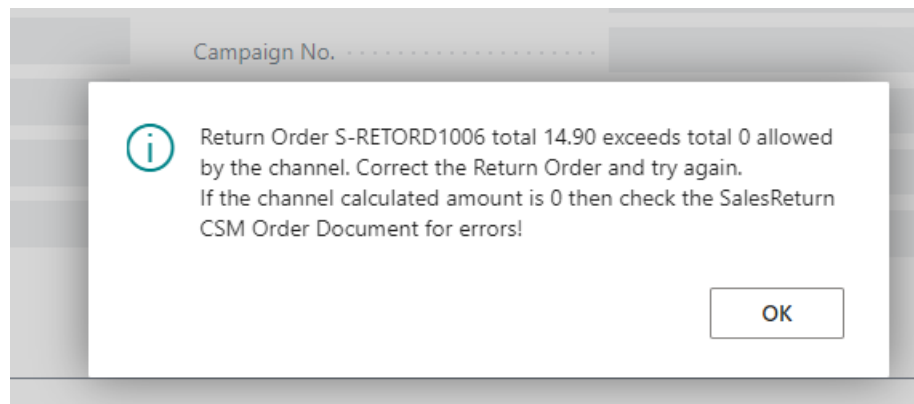
You can generate a sales return order from any CSM order that has been fully or partially shipped. CSM will not allow you to create a return for any CSM orders that have not been shipped.

1. Open the **CSM Channel Orders** list, then select an order for which the return will be issued.
2. Choose the **Create Sales Return Order** action in the ribbon on the **CSM Order** page.
3. CSM creates a new sales return order and updates the CSM order's sales return status to Open. You can navigate to this return directly from the CSM order by selecting the **Outstanding Return Order Amount** link in the **Sales Channel Order Statistics** FactBox.
4. On the **Sale Return Order** page, in the **Channel Sales Manager** FastTab enter a **CSM Return/Refund Reason** (some examples are, damaged, wrong size, wrong color, wrong style, etc.).
5. Make any necessary adjustments on the return order lines.

***Note:** if you wish to perform a partial return, you must reduce the value in the **Quantity** field for the relevant return lines accordingly. Adjusting the quantity to receive, rather than the quantity, will result in an incorrect refund amount being calculated by Shopify.*

6. In the **Return Reason Code** field for each line that will be returned, enter or use the AssistButton to assign a return reason.
7. Once you have finished entering the necessary information on the return order, choose the **Release** action in the ribbon.

Attempting to release the return order will send an API call to Shopify with instructions to calculate and retrieve a refund amount for the return. CSM will also perform a number of validations to ensure that the sales return order is in sync with the Shopify order (the order hasn't already been returned, order quantities are correct, etc.). If any discrepancies are detected, the release process will error and a message will instruct the user as to where the inconsistency lies:



If the release process is successful, CSM will capture the calculated refund information and use it later when the return order is posted to create the refund on Shopify. In addition, the related CSM order's refund status will be updated to Pending, and its sales return status will be updated to Released.

Regardless of whether the release process was successful, a new sales return order document line will be entered on the **CSM Order Documents** FastTab of the related CSM order. This line contains information about the return order. In addition, if the release process produced an error, the text of the error message can be reviewed in the **Last External Update Result** field. You can view additional information about this line by choosing the FastTab's **Manage** ribbon, then choosing the **Document Transactions** action.

***Note:** As an alternative to releasing the sales return, you can choose the **Actions** ribbon, then select the **Functions** menu and choose the **Suggest CSM Refund** action. CSM will make the same API call to Shopify to obtain a refund amount and identify any discrepancies, but will not attempt to release the sales return order.*

8. If the return order was successfully released, it can now be posted. Choose the **Post** action in the ribbon.

This will perform the standard Business Central activities that occur whenever a sales return order is posted:

- The sales return order is deleted and posted return and credit memo documents are created. The CSM return/refund reason that was specified on the sales return will be copied to these archive documents.
- An inventory adjustment for the return amount is made to the specified location, along with the related item ledger entries.
- A new credit memo entry for the refund amount will be entered in the customer's ledger.



In addition, the following adjustments are made to the related CSM order:

- New credit memo and return receipt order document lines will be entered on the **CSM Order Documents** FastTab. You can view additional information about these lines by choosing the FastTab's **Manage** ribbon, then choosing the **Document Transactions** action.
- The CSM order's refund status will be updated to Complete.
- The CSM order's sales return status will be updated to Posted.
- In the **Sales Channel Order Statistics** FactBox, the outstanding return order amount, posted shipments, and total amount credited values will be updated accordingly.

Sending and Retrieving Refund Information from Shopify

After the sales return order is posted, CSM will send credit memo information to Shopify. The manner in which this is sent depends on the selected value in the **Send Refund Cr. Memo** field on your Shopify sales channel:

- *Immediate*: will send automatically when the return order/credit memo is posted.
- *Scheduled*: will be sent when the SENDCREDITMEMO automation runs.
- *Manual*: will be sent when the user checks the **External Requires Update** field on the CSM order document line and uses the **Send to Channel** action on the **CSM Order** page.

After CSM communicates this information to Shopify, Shopify will process/issue the refund. Depending on the seller's balance on Shopify and other factors, this process may not be instantaneous.

When Shopify does issue the refund, this activity will be retrieved into Business Central by CSM the next time the order automation routines are executed. Retrieving this refund information results in the following activities:

- A new refund entry is entered in the customer's ledger. This entry is applied to the related credit memo entry.
- A new refund order document line is entered on the **CSM Order Documents** FastTab. You can view additional information about this line by choosing the FastTab's **Manage** ribbon, then choosing the **Document Transactions** action.
- The **Refund Reference** field on the related CSM order is populated with a reference number that is obtained from Shopify.

Release Objects

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

Object Type	Object ID	Object Name	Action
Page	70338377	CSMShopifyPOSWizard	Modified
Codeunit	51501	CSM Shopify Test Library	Modified
Codeunit	51506	CSM Shopify Return Refund Test	Created
Codeunit	70338375	CSM Shopify Utility Functions	Modified
Codeunit	70338377	CSM Shopify Response Mgt	Modified
Codeunit	70338378	CSM Stripe Integration Shopify	Modified
Codeunit	70338379	CSM Shopify Data Load	Modified
Codeunit	70338380	CSM Shopify Upgrade	Modified



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">• OnBeforeSendCrMemoCreateToChannelOperation• OnAfterSendCrMemoCreateToChannelOperation• OnBeforeCSMOrderDocumentGetRefundTotalShippingAmount• OnAfterCSMOrderDocumentGetRefundTotalShippingAmount
Codeunit	70338377	CSM Shopify Response Mgt	<ul style="list-style-type: none">• OnAfterRefundCalculateCreateResponse