



Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager Core

Release: 3.7

Version: 3.7.2023032822.76767

Release Date: 03/28/2023

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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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

- A new CSM upgrade notifications feature has been added to CSM Core. This feature uses standard Business Central notifications functionality to alert users of changes that are made to installed CSM extensions as part of a version upgrade and advise of any actions that must be taken to accommodate these changes. See [the in-depth feature description](#) for more details.

Channel Foundations

The following Channel Sales Manager Core changes will support forthcoming features and functionality for channel-specific integrations:



- To support all channel integrations, the ability to send a Business Central customer or contact to a connected channel, create a customer record there, then retrieve the customer's external ID back into Business Central. This process can be performed against an individual customer/contact record or multiple records at once. See the [in-depth feature description](#) for more details.
- To support an upcoming BigCommerce integration, automation support has been added for sending item price updates from Business Central to an external channel.
- To support an upcoming Magento integration, changes were made involving item attribute/attribute set retrieval:
 - The existing routine for retrieving item attributes was re-structured/improved.
 - A new routine for the retrieval of attribute sets has been added.
- To support an upcoming Magento integration, functionality has been added that will support the ability to assign multiple CSM channel categories to a single CSM listing:
 - A new **Add Additional Category to Product Information** action has been added to the **CSM Listing** page.
 - A new **Send Additional Categories to Channel** action has been added to the **CSM Listing** page.
 - A new *CSM Channel Category* option has been added to the **Information Type** field on the **Product Information** page.
 - **Source Type 1** and **Source Type 2** fields on the **Product Information** page have been updated to allow for the assignment of a CSM sales channel and CSM channel category, respectively.
- To support an upcoming Magento integration, a new integration event has been added to permit the overriding of CSM's default routine for naming child CSM listings.
- To support an upcoming Amazon integration, functionality has been added to support communication to third party shippers.

In-Depth Features

Enabling and Receiving CSM Notifications

CSM uses Business Central's [notifications functionality](#) to keep users informed of critical changes that are made to new versions of the application. Enabling this feature is not required, but it is recommended.

To enable CSM notifications:

1. Choose the  icon, enter **CSM Setup**, and then choose the related link.
2. On the **CSM Setup** page, turn on the **Enable CSM Notifications** field in the **Notifications** FastTab.
3. Choose the  icon, enter **User Setup**, and then choose the related link.
4. On the **User Setup** page, select the user who will receive CSM notifications, then enter a check mark in the **Receive CSM Notifications** field.
5. Repeat this step if additional users will receive CSM notifications.

CSM notifications are stored in a dedicated **CSM Upgrade Notification** table. If a new version of a CSM extension requires action on your part, Suite Engine will include the relevant information in this table. You can access this table via standard Business Central search functionality. In addition, any users who are set up to receive upgrade notifications will be presented with a notification directly in their respective role centers when they log into Business Central. This notification will continue to be displayed in the role center until the new upgrade notifications are marked as having action taken.

To take action against a CSM upgrade notification:



1. In the **CSM Upgrade Notifications** page, review the line for the new upgrade notification. Each line contains information about the application for which the notification was created, the version number, and basic description information.
2. If a check mark appears in the **Action Required** field, there is some action you must perform to accommodate changes made with the new product version. Instructions on the steps you need to perform are presented in the notification line's informational fields. In addition, there are two actions on the ribbon that may assist you:
 - **Open Page:** if an action page name is assigned to the notification line, you can choose this action to open the page in Business Central on which you need to perform the necessary upgrade activity.
 - **How-to-Instructions:** if an address is entered in the notification line's **How-to Instructions URL** field, you can choose this action to visit that URL. This allows you to access supporting material that is supplied by Suite Engine, such as a how-to-video or blog post containing instructions and information.
3. When you have performed the necessary action, place a check mark in the **Action Taken** field.


CSM will automatically record the date, time, and user who marked the action as having been taken. If any upgrade notifications are not completed in this way, the designated CSM notifications users in your organization will continue to receive upgrade notifications alerts in their role centers when accessing Business Central.

Sending Customer/Contacts to a Connected Channel

It is possible to send customers and contacts from Business Central to a connected external channel.

Sending Customers from Customer/Contact Cards

You can send a single customer to a connected channel directly from the customer card in Business Central:

1. Choose the  icon, enter **Customers**, and then choose the related link.
2. Open the customer that you want to link to the external sales channel.
3. Choose the **Actions** tab in the ribbon, then choose the **Create CSM Sales Channel Customer** action. This action will not be available if the customer is linked to all CSM sales channels in your Business Central environment.

If multiple CSM sales channels have been set up in Business Central, these will be presented to you.

4. Choose the sales channel to which you want to send the customer, then choose the **OK** button.

CSM will attempt to create a new CSM customer record for the selected sales channel, then send this customer's information to the external platform. A new customer record is created in the external platform and basic information such as the address and e-mail is copied from the CSM customer in Business Central. The external ID for this record is then retrieved back into Business Central, establishing a link between the customer records in both environments. As part of the process of sending customer information to the external platform, CSM will perform a number of data validations to ensure that required information (such as name and e-mail) is defined for the customer and that proper customer/contact relationships exist. If these criteria are not satisfied, CSM will create a new CSM customer for the sales channel, but it will not export this information to the external environment. You can review the **Last External Update Result** field for the CSM customer for information as to why the export process failed.

You can view a list of all CSM sales channels to which a customer has been linked from the customer's card by choosing the **Related** ribbon, then choosing the **CSM Channel Customers** action.



It is also possible to send Business Central contacts to a connected channel, where they will be created as customers. The processes described above work the same way for contacts, and can be performed from the contact card.

Sending Customers from Customer/Contact Lists

You can send multiple customers from Business Central to a connected channel at once from the **Customers** list page:

1. Select all of the customers you want to link to the external sales channel.
2. Choose the **Actions** ribbon, then choose the **Mass Create CSM Sales Channel Customers** action.

A confirmation message will ask if you want to create CSM customers for the selected customers.

3. Choose the **Yes** button.
4. Choose the sales channel to which you want to send the customers, then choose the **OK** button.

For each customer that does not have an existing link to the selected payment platform, CSM will attempt to create a new CSM customer record for the selected sales channel, then send this customer's information to the external platform. A new customer record is created in the external platform and basic information such as the address and e-mail is copied from the CSM customer in Business Central. This external ID for this record is then retrieved back into Business Central, establishing a link between the customer records in both environments.

As part of the process of sending customer information to the external platform, CSM will perform a number of data validations to ensure that required information (such as name and e-mail) is defined for the customer and that proper customer/contact relationships exist. If these criteria are not satisfied, CSM will create a new CSM customer for the sales channel, but it will not export this information to the external environment. When the process is completed for all selected customers, a message will be presented to the user specifying the number of new CSM customers that were created, as well as the number of selected customers that were not created because they already had a link to the external channel or there was insufficient data. You can review the **Last External Update Result** field for the CSM customer for information as to why the export process failed.

You can view a list of all CSM sales channels to which a customer has been linked from the **Customers** list by choosing the **Related** ribbon, then choosing the **CSM Channel Customers** action.

It is also possible to send multiple Business Central contacts to a connected channel, where they will be created as customers. The processes described above work the same way for contacts, and can be performed from the **Contacts** list.

Release Objects

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

Object Type	Object ID	Object Name	Action
Table	70338200	CSM Setup	Modified
Table	70338212	CSM Product Information	Modified
Table	70338220	CSM Sales Channel	Modified

Object Type	Object ID	Object Name	Action
Table	70338225	CSM Customer	Modified
Table	70338240	CSM Listing	Modified
Table	70338248	CSM Item Attribute Set	Modified
Table	70338262	CSM Upgrade Notification	Modified
Page	70338200	CSM Setup	Modified
Page	70338212	CSM Product Information Card	Modified
Page	70338219	CSM Order Archive	Modified
Page	70338220	CSM Sales Channel	Modified
Page	70338221	CSM Order	Modified
Page	70338225	CSM Customers	Modified
Page	70338240	CSM Listing	Modified
Page	70338248	CSM API Credential	Modified
Page	70338249	CSM API Shared Session	Modified
Page	70338253	CSM Item Attribute List	Modified
Page	70338264	CSM Item Attribute Set List	Modified
Page	70338277	CSMRetrieveChannelOrderDialog	Modified
Page	70338279	CSM Get Listings From Channel	Modified
Page	70338286	CSM Customer Orders	Created
Page	70338289	CSM Customer Links Factbox	Created
Page	70338292	CSM Upgrade Notifications	Modified
Codeunit	70338205	CSM Order Management	Modified
Codeunit	70338206	CSM Order Mgt Automation	Modified
Codeunit	70338207	CSM Listing Management	Modified
Codeunit	70338208	CSM Listing Mgt Automation	Modified
Codeunit	70338213	CSM Upgrade	Modified
Codeunit	70338221	CSM Notification Management	Modified
PermissionSet	70338200	CSM Core	Modified

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	70338212	CSM User Setup	Modified	User Setup
PageExtension	70338208	CSM BC Customer Card	Created	Customer Card
PageExtension	70338209	CSM BC Customer List	Created	Customer List
PageExtension	70338210	CSM BC Contact List	Created	Contact List
PageExtension	70338211	CSM BC Contact Card	Created	Contact Card

Integration Events

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

Object Type	Object ID	Object Name	Integration Events
Table	70338225	CSM Customer	<ul style="list-style-type: none"> OnBeforeValidateCustomerForCreateCSMCustomer OnBeforeValidateContactForCreateCSMCustomer OnAfterValidateCustomerForCreateCSMCustomer OnAfterValidateContactForCreateCSMCustomer OnBeforeCreateAndSendCSMCustomer OnAfterCreateAndSendCSMCustomer OnCreateAndSendCSMCustomerFromTypeOther
Table	70338240	CSM Listing	<ul style="list-style-type: none"> OnAfterAssignInfoToChildListing
Codeunit	70338205	CSM Order Management	<ul style="list-style-type: none"> OnBeforeSendSalesChannelCustomerToChannelOperation
Codeunit	70338206	CSM Order Mgt Automation	<ul style="list-style-type: none"> OnGet3PLShipmentStatus OnCreateBCShipmentFor3PLShipment
Codeunit	70338207	CSM Listing Management	<ul style="list-style-type: none"> OnGetAPIFunctionForGetCSMItemAttributesFromChannelOperation OnAfterGetCSMItemAttributesFromChannelOperation OnBeforeGetCSMItemAttributeFromChannelOperation OnBeforeSubmitAdditionalCategoriesToChannelOperation OnGetAPIFunctionForSubmitAdditionalCategoriesToChannelOperation OnAfterLISTING_SubmitAdditionalCategoriesToChannelOperation OnBeforeGetItemAttributeSetsFromChannelOperation OnGetAPIFunctionForGetItemAttributeSetsFromChannelOperation OnAfterGetCSMItemAttributeSetsFromChannelOperation OnGetAPIFunctionForGetItemAttributesFromChannelOperation OnAfterGetItemAttributesFromChannelOperation
PageExtension	70338209	CSM BC Customer List	<ul style="list-style-type: none"> CSMOnBeforeSkipCustomer CSMOnAfterSkipCustomer
PageExtension	70338210	CSM BC Contact List	<ul style="list-style-type: none"> CSMOnBeforeSkipContact CSMOnAfterSkipContact