Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager Core
Release: 3.8
Version: 3.8.2023060922.86244
Release Date: 06/15/2023
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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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 *OnAfterCSMCustomerAdded* integration event has been added to the **CSM Wizard** page.
- New fields for excluding the sending of G/L account and resource lines as part of shipments have been added to the CSM Sales Channel table. If these fields are enabled and CSM sends shipment information from Business Central to update an order on a connected platform, any G/L account and/or resource lines will be skipped. In scenarios where there are a large volume of these line types, excluding these records can reduce the time it takes to execute the order automation.
- Several improvements have been made to the **Create CSM Listing from BC Items** action that is used to create CSM listings for multiple Business Central items at once:

- A "last used options and filters" option has been added to allows users to run the action according to a standard set of criteria.
- A number Item No. option has been added to the **SKU Number** assignment field.

Channel Foundations

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

- To support an upcoming WooCommerce integration, an **External ID** field has been added to the **CSM Order Line Option** table. This will support refund scenarios where taxes need to be linked back to the proper document.
- To support an upcoming WooCommerce integration, CSM fields that exist on sales lines to link sales order items to an associate CSM transaction have been expanded to populate for non-item lines. This is necessary to associate sales tax lines that are entered against a G/L account to the proper item(s).
- To support an upcoming WooCommerce integration, changes have been made to CSM Core objects to support the retrievals of refunds from an external eCommerce platform.
- To support an upcoming WooCommerce integration, refund fields that are displayed on the CSM Sales Channel page have been moved from platform extensions to CSM Core.
- To support an upcoming Magento integration, functionality that allows for the retrieval of channel categories from a connected platform has been implemented.

Corrections

- If a CSM setup record was not present in Business Central, any Role Center would display an error message. This has been corrected.
- The status text for order document lines on CSM orders that were retrieved to build refund credit memos were displaying placeholder values for variable text, rather than the text itself. This has been corrected.
- Dimensions were not being assigned to customer ledger and general ledger entries created by CSM as a result of retrieving and posting refunds from a connected platform. This has been corrected.
- Several corrections have been made to the process of creating new CSM attributes for configurable items through the listing wizard:
  - These attributes were not being properly identified as configurable.
  - The attribute name was being used to validate whether the attribute already existed as a CSM attribute. This created issues if the attribute's name was not identical to the existing CSM attribute. This has been changed to use the Link 1 value, rather than the name, when performing validations.
- When assigning CSM attributes to an attribute set, the lookup list from the **CSM Item Attribute Code** field was not filtered to display only those attributes that have been defined for the related CSM sales channel. This has been corrected.
- When attempting to open the **CSM API Messages** list, users would sometimes encounter a JIT load error message. This has been corrected.
- The housekeeping automation routine has been optimized for faster performance.

Miscellaneous

- Miscellaneous code clean-up activities that bring CSM in line with Microsoft's coding guidelines have been completed.

- The process by which CSM determines whether CSM is in live or test mode has been moved from platform extensions and to Suite Engine's subscription extension.

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	70338207	CSM API Message	Modified
Table	70338220	CSM Sales Channel	Modified
Table	70338224	CSM Order Line Options	Modified
Table	70338235	CSM Channel Category	Modified
Table	70338239	CSM Order Line Archive Options	Modified
Table	70338240	CSM Listing	Modified
Table	70338241	CSM Listing Children	Modified
Table	70338243	CSM API Credential	Modified
Table	70338244	CSM Order Document Line	Modified
Page	70338207	CSM API Messages	Modified
Page	70338215	CSM Order Line Archive Options	Modified
Page	70338216	CSM Wizard	Modified
Page	70338220	CSM Sales Channel	Modified
Page	70338223	CSM Order Documents	Modified
Page	70338224	CSM Order Line Options	Modified
Page	70338235	CSM Channel Categories	Modified
Page	70338240	CSM Listing	Modified
Page	70338241	CSM Listing Children List	Modified
Page	70338243	CSM Order Archive Documents	Modified
Page	70338248	CSM API Credential	Modified
Page	70338271	CSM Item Attrib Set Attributes	Modified
Report	70338200	CSM Add Item to Listing	Modified
Codeunit	87003	CSM Request Management Test	Modified
Codeunit	87005	CSM Core Test Utility Library	Modified
Codeunit	70338205	CSM Order Management	Modified
Codeunit	70338206	CSM Order Mgt Automation	Modified
Codeunit	70338207	CSM Listing Management	Modified
Codeunit	70338209	CSM Create Sales Order	Modified
Codeunit	70338210	CSM Stripe Integration Core	Modified
Codeunit	70338213	CSM Upgrade	Modified

Object Type	Object ID	Object Name	Action
Codeunit	70338215	CSM Create Sales Credit Memo	Modified
Codeunit	70338217	CSM Sales Operation Rules Mgt.	Modified
Codeunit	70338221	CSM Notification Management	Modified
Codeunit	70338222	CSM Telemetery Logger	Created
Enumeration	70338211	CSM Authorization Type	Modified
Enumeration	70338222	CSM SKU Listing Mapping	Modified
Enumeration	70338225	CSM Order Processing Action	Modified
Enumeration	70338230	CSM Sales Ln Channel Line Type	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	70338206	CSM Sales Line	Modified	Sales Line
TableExtension	70338207	CSM Return Receipt Line	Modified	Return Receipt Line
TableExtension	70338208	CSM Sales Shipment Line	Modified	Sales Shipment Line
TableExtension	70338209	CSM Sales Invoice Line	Modified	Sales Invoice Line
TableExtension	70338210	CSM Sales Cr.Memo Line	Modified	Sales Cr.Memo Line
TableExtension	70338211	CSM Sales Line Archive	Modified	Sales Line Archive

Integration Events

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

Object Type	Object ID	Object Name	Integration Events
Page	70338216	CSM Wizard	• OnAfterCSMCustomerAdded
Codeunit	70338205	CSM Order Management	• OnRunOnAfterRunSOBuildCodeunit • OnRunOnAfterRunSalesCrMemoBuildCodeunit • OnBeforeRetrieveRefundFromChannel • OnGetAPIFunctionForRetrieveRefundFromChannelOperation • OnAfterRetrieveRefundFromChannel • OnBeforeShouldSendShipmentInformationForLine • OnAfterShouldSendShipmentInformationForLine • OnCreateSalesChannelCrMemoDocumentLinesOnBeforeFilterSalesCrMemoLines • OnCreateSalesChannelReturnOrderDocumentLinesOnBeforeFilterSalesReturnLines
Codeunit	70338206	CSM Order Mgt Automation	• OnGetOrderRefundsAutomation • OnRunAutomationOnAfterProcessTask • OnRunAutomationOnAfterProcessScheduledJob • OnProcessOrderAutomationOnAfterProcessAutomation • OnProcessFulfillmentAutomationOnAfterProcessAutomation
Codeunit	70338207	CSM Listing Management	• OnBeforeRecieveCategoriesFromChannelOperation • OnBeforeGetChildListingFromChannelOperation • OnGetAPIFunctionForGetChildListingFromChannelOperation • OnAfterGetChildListingFromChannelOperation

Object Type	Object ID	Object Name	Integration Events
Codeunit	70338215	CSM Create Sales Credit Memo	• OnAfterCreateCreditMemo • OnAfterCreatCreditMemo