



Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager for WooCommerce

Release: 3.1

Version: 3.1.2023061622.87145

Release Date: 06/16/2023

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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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.
- It is now possible to retrieve orders by their modified, rather than creation date. This reduces the number of API calls that are made during order retrieval, leading to better performance. For more information on how to configure this feature, please click [here](#).
- CSM will now retrieve any notes that are added to an order in WooCommerce following its initial retrieval into Business Central. See the [in-depth feature description](#) for more details.



- New functionality has been added that allows CSM to retrieve refund information from WooCommerce, then automatically created a credit memo in Business Central. When posted, this credit memo will be applied to the ledger entries from the original sales order. See the [in-depth feature description](#) for more details.
- WooCommerce-specific accommodations were made to utilize attribute retrieval improvements that were introduced with a recent release of CSM Core.

Corrections

- The setup wizard presented confusing/inaccurate instructions on how to properly enter the ID of the website to which you are connected. This has been corrected.
- CSM order document lines for payments were always presenting a payment value of zero. This has been corrected.

Miscellaneous

- CSM for WooCommerce's automated test scripts have been expanded to include additional testing scenarios.
- The process by which CSM determines whether CSM is in live or test mode has been moved from CSM for WooCommerce and to Suite Engine's subscription extension.
- CSM for WooCommerce has been compiled against Microsoft Dynamics 365 Business Central 2023 Wave 1 (version 22) for compatibility issues. No issues were detected and no changes to the extension were necessary.

In-Depth Features

Order Note Retrieval

The CSM for WooCommerce extension will automatically retrieve any order notes that were entered by the customer at the time of order entry into Business Central as order document lines on the CSM order.

It is possible for additional notes to be added to an order in WooCommerce after it has been retrieved into Business Central:

- System-generated notes: these are automatically assigned to an order by WooCommerce to reflect activity that is performed against it (for example, notifications of stock level changes, shipping and tracking information, etc.).
- User-created notes: these are manually entered by a user. These could be additional instructions from a customer or notes added by an administrator through the WooCommerce administration portal.

You can retrieve all notes that exist for a WooCommerce sales order by opening the relevant CSM order in Business Central and choosing the **Update** ribbon, then choosing the **Get Order Notes** action.

All retrieved notes are added to the **CSM Order Documents** FastTab. You can view the contents of each note in the **Comment** field.

When notes are created for an order in WooCommerce, they are identified as either being private or viewable to the order's customer. You can see the status of each note on the CSM document line by reviewing the **Comment is Customer Viewable** field. If this field is checked, the note is viewable to the customer. If this field is blank, it is a private note.

Note: the order retrieval functionality will retrieve all notes that exist for an order in WooCommerce. If you wish to restrict the type of notes you retrieve (for example, if you only want to retrieve user-created notes), you must customize your CSM for WooCommerce solution. Please instruct your Business Central partner or developer to the `OnAfterGetOrderNotesforCSMOrderOperation` event to make any changes to the order note retrieval process.

Retrieving Refunds from WooCommerce

A number of fields have been made available on the CSM Sales Channel page that allow you to configure your WooCommerce sales channels to retrieve refunds from the external eCommerce platform, then use this information to create sales credit memos:

- **Enable Refund Processing:** Enable this field if you want to retrieve refunds that are entered for orders on WooCommerce into Business Central, then build credit memos for them. Enabling this setting will display a number of refund configuration fields below it.
- **Cr. Memo Build Codeunit:** The Codeunit ID to use when building a Sales Cr. Memo for a CSM Order from this channel.
- **Credit Memo No. Series:** The number series to use when creating new Business Central Sales Cr. Memo from this Sales Channels Channel Orders.
- **Refund Discrepancy Behavior:** Indicates how refund discrepancy will be treated when building a Sales Credit Memo.
 - *None:* the discrepancy line won't be used on CSM Orders
 - *Line:* the discrepancy will appear as a line on the CSM Order.
- **Refund Discrepancy Line Type:** The type for a refund discrepancy line which represents other refunds. Options are G/L Account, Item, Charge Item, Fixed Assets, and Resource.
- **Refund Discrepancy Line No.:** Enter or use the AssistButton to assign the desired record (based on the selected discrepancy line type) to which refund discrepancies will be posted.
- **Return Location:** Enter or use the AssistButton to assign the Business Central location to which you want to receive items that are being returned by customers that you want to re-stock. This location is assigned to credit memos that are created by CSM when refunds that are initiated through WooCommerce are retrieved into Business Central.
- **Returnless Location:** Enter or use the AssistButton to assign the Business Central location to which you want to receive items that are being returned by customers that you do not want to credit but do not want to re-stock (typically this is a virtual location). This location is assigned to credit memos that are created by CSM when refunds that are initiated through WooCommerce are retrieved into Business Central.

Release Objects

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

Object Type	Object ID	Object Name	Action
Page	70338301	CSM WooCommerce Setup Wizard	Modified
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

Object Type	Object ID	Object Name	Action
Codeunit	70338409	CSM WooComm Define UpgradeTags	Modified
Codeunit	70338410	CSM WooCommerce Install	Created
Codeunit	70338421	CSM WooCommerce Test	Modified
Codeunit	70338423	CSM WooCommerce Test Library	Created
PermissionSet	70338400	CSM WooCommerce	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	70338300	CSMWOO Order HeaderArchive	Created	CSM Order Header Archive
TableExtension	70338404	CSMWOO Order Line	Created	CSM Order Line
TableExtension	70338405	CSMWOO Order Line Archive	Created	CSM Order Line Archive
TableExtension	70338406	CSMWOO Order Header	Created	CSM Order Header
PageExtension	70338401	CSM Order WooCommerce	Modified	CSM Order
PageExtension	70338412	CSMWOO Order Lines	Created	CSM Order Lines
PageExtension	70338413	CSMWOO Order Archive Lines	Created	CSM Order Archive Lines

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"> OnAfterGetRefundResponse
Codeunit	70338405	CSM WooComm Utility Functions	<ul style="list-style-type: none"> OnBeforeGetOrderNotesForCSMOrderOperation OnAfterGetOrderNotesForCSMOrderOperation
Codeunit	70338406	CSM WooCommerceAPIProcessing	<ul style="list-style-type: none"> OnBeforeGetPaymentAmount OnBeforeFindRelatedPaymentOrderDocumentId OnBeforeFindRelatedPaymentChannelPaymentMethod OnBeforeFindSalesChannelOrdersForSalesReturn