



Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager for WooCommerce

Release: 3.2

Version: 3.2.2023071822.91225

Release Date: 07/31/2023

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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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

- 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 WooCommerce, where the relevant order is updated accordingly. See the [in-depth feature description](#) for more details.

In-Depth Features

it is possible to initiate a return order from Business Central and then send this to the corresponding order on your external WooCommerce 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 WooCommerce 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 WooCommerce.
- **Send Refund Cr. Memo When:** select the method by which credit memo information will be sent to WooCommerce.
 - *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 WooCommerce, and these fields can be ignored for your WooCommerce 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.

Business Central's standard **Copy Sales Document** page is displayed. This page is automatically configured to copy the related order's sales document, so it should not be necessary to change any values.

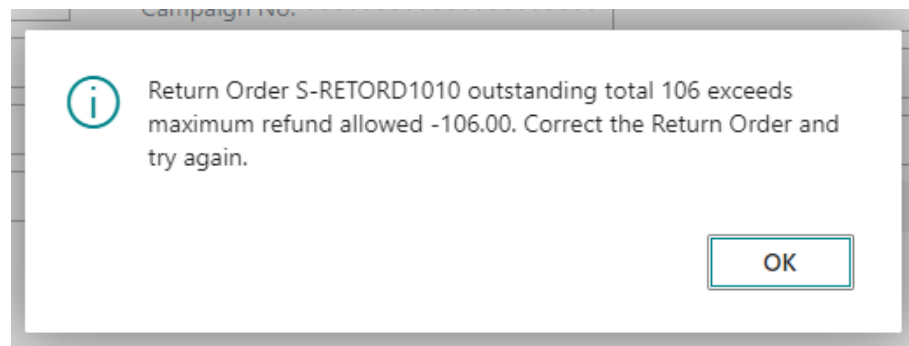
3. Choose the **OK** button. CSM creates a new sales return order and updates the CSM order's sales return status to Open. You can navigate to this return directly from the CSM order by selecting the **Outstanding Return Order Amount** link in the **Sales Channel Order Statistics** FactBox.
4. On the **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 WooCommerce.*

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 validate it against the related CSM order to ensure that the two documents are in sync (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, 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.

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.
- 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 WooCommerce

After the sales return order is posted, CSM will send credit memo information to WooCommerce. The manner in which this is sent depends on the selected value in the **Send Refund Cr. Memo** field on your WooCommerce 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 WooCommerce, WooCommerce will process/issue the refund. Depending on the seller's balance on WooCommerce and other factors, this process may not be instantaneous. When WooCommerce 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.
- The CSM order's channel status value will be updated to refunded.
- A new refund order document line is entered on the **CSM Order Documents** FastTab.
- The **Refund Reference** field on the related CSM order is populated with a reference number that is obtained from WooCommerce.

Release Objects

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

Object Type	Object ID	Object Name	Action
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	70338409	CSM WooComm Define UpgradeTags	Modified

Integration Events

The following integration events have been added or modified 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">• OnAfterSimpleWooCommerceResponse