Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager for BigCommerce
Release: 3.3
Version: 3.3.2023090522.97261
Release Date: 09/26/2022
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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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 **Enable New Attribute Design** field is now automatically set to true for any BigCommerce channel that is created via the setup wizard.
- New functionality has been added that allows CSM to retrieve refund information from BigCommerce, then automatically create 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.
- It is now possible to assign multiple CSM categories to a single CSM listing. See the in-depth feature description for more details.

- The ability to send attributes from Business Central to BigCommerce has been expanded to include item attributes that are assigned to the related Business Central item. These attributes will be assigned as custom fields to the related product record in BigCommerce.
- When a CSM listing for a configurable item is successfully sent from Business Central to BigCommerce, the **External Requires Update** field on all related child listings is automatically turned off.

Corrections

- In some situations where an API call failed, the status fields in Business Central would indicate that the event had been successful. This has been corrected.

Miscellaneous

- CSM for BigCommerce'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 BigCommerce and to Suite Engine's subscription extension.

In-Depth Features

Retrieving Refunds from BigCommerce

A number of fields have been made available on the CSM Sales Channel page that allow you to configure your BigCommerce 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 BigCommerce 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 discrepancies 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 BigCommerce 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 BigCommerce are retrieved into Business Central.

When the **Enable Refund Processing** field is enabled on a BigCommerce sales channel and the corresponding refund setup fields are configured, CSM will automatically retrieve refunds that are entered through your BigCommerce site into Business Central. CSM for BigCommerce includes out-of-the-box automation routines that will automatically create Business Central sales credit memos based on this retrieved data. These automation routines can be configured to automatically post these credit memos, as well. As part of this operation, the related refund and credit memo entries are created in the appropriate customer ledger and are applied to each other (with the exception of "external refunds," as described below).

> *Note: in order to work with refunds, the following settings for your BigCommerce sales channel must be configured as follows:*
> 1. On the **Order Management** FastTab:
>   - The **Payment Behavior** field must be set to *Channel*.
>   - The assigned record in the **Payment Method Code** field must not have an assigned balancing account in Business Central.
> 2. When setting up CSM payment methods, the payment method(s) that will be assigned to orders or refunds must have a defined balancing account in Business Central.

It may be that a discrepancy exists between the amount that is retrieved from BigCommerce and the amount that is entered on the credit memo in Business Central. It is possible to define a refund discrepancy account for a BigCommerce sales channel. If any discrepancies do exist, an extra line for the refund discrepancy account will be added to the sales credit memo, and the discrepancy amount will be assigned to it.

When a refund is created in BigCommerce, it is possible to indicate whether the refunded items will be restocked. CSM supports both scenarios by allowing you to identify both return and "returnless" refund locations for your BigCommerce channels. As part of the refund retrieval process from BigCommerce, CSM obtains the restocking policy. When CSM builds a sales credit memo in Business Central, this value determines which location will be assigned:

- If the refund has instructions to restock items, the sales credit memo will be created for the defined return location.
- If the refund does not have instructions to restock items, the sales credit memo will be created for the defined returnless location.

BigCommerce supports the concept of an external refund method, meaning that a refund can be issued externally against a payment provider. When an external refund is processed in BigCommerce, CSM will still retrieve it into Business Central, create a credit memo based on its information, and (depending on configuration) automatically post it. However, a corresponding refund entry will not be created in the related customer ledger. The end result of this process is an open, unapplied credit memo entry that can be manually applied as needed.

Adding Multiple CSM Categories to a CSM Listing

When a CSM listing is created, CSM uses the category mapping that has been defined for the BigCommerce channel to assign a primary channel category. In some scenarios, however, it may be desirable to associate multiple categories to a single listing. For example, if we created a listing for a pair of women's pants, we might have separate categories for women's clothing and pants, both of which would be applicable to the listing.

You can assign additional categories to a CSM listing:
1. In the navigation ribbon on the **CSM Listing** page, select the **Add Additional Category to Product Information** action.

2. A CSM Product Information card will open. From there, enter the following fields:
   a. **Information Type** is *Category*
   b. Enter a **Caption** field for the product
   c. **Source Type** is *CSM Channel Category*
   d. **Source Type 1** is the sales channel code
   e. **Source Type 2** is the channel category name (must already exist as a CSM Category in Business Central or an error will occur).

If you have assigned multiple categories to a listing, they will be sent to BigCommerce as part of the **Send All Listing Data to Channel** action. If you add these categories after the listing is initially sent to BigCommerce, however, you can update the product on BigCommerce with this additional information by choosing the **Actions** ribbon, then opening the **Channel Integration** group and choosing the **Send Additional Categories to Channel** action.

Release Objects

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

Object Type	Object ID	Object Name	Action
Page	70338425	CSM BigComm Setup Wizard	Modified
Codeunit	70338426	CSM Big Commerce Response Mgt	Modified
Codeunit	70338427	CSM Big Commerce Utility Funct	Modified
Codeunit	70338428	CSM Big Commerce Data Load	Modified
Codeunit	70338429	CSM Stripe Integ Big Commerce	Modified
Codeunit	70338430	CSM BigCommerce Product Mgmt	Modified
Codeunit	70338432	CSM BigCommerce Upgrade	Modified
Codeunit	70338433	CSMBIG Define UpgradeTags	Created
Codeunit	70338447	CSM BigCommerce Test Library	Modified
Codeunit	70338448	CSM BigCommerce Test	Modified
PermissionSet	70338425	CSM FOR BIGCOMMERCE	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	70338431	CSMBIG Sales Channel	Created	CSM Sales Channel
TableExtension	70338432	CSMBIG Order Document Line	Created	CSM Order Document Line
TableExtension	70338433	CSMBIG Order Archive Doc. Line	Created	CSM Order Archive Doc. Line
PageExtension	70338425	CSMSetupBigCommAdditions	Modified	CSM Setup
PageExtension	70338428	CSM Sales Channel BigCommerce	Modified	CSM Sales Channel
PageExtension	70338441	CSMBIG Order Document Lines	Created	CSM Order Document Line
PageExtension	70338442	CSMBIG Order Archive Doc Lines	Created	CSM Order Archive Doc. Lines

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	70338426	CSM Big Commerce Response Mgt	• OnAfterBigCommGeneralListResponse
Codeunit	70338427	CSM Big Commerce Utility Funct	• OnBeforeFindSalesChannelOrdersForSalesReturn