



Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager Core

Release: 3.12

Version: 3.12.2023121923.112243

Release Date: 12/19/2023

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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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

- It is now possible to assign a Business Central resource as the refund discrepancy account on a CSM sales channel.
- A *Create* option has been added to the list of available order processing action types for CSM sales operation rules. This allows companies to develop operational rules to allow or deny the creation of sales orders if certain criteria are met.
- It is now possible to automatically create CSM listings directly from the standard Business Central item card. See the [in-depth feature description](#) for more details.
- New integration events have been added to CSM:
 - A new integration event to support additional scenarios for sending CSM attributes from Business Central to a connected channel has been added to the **CSM Listing Management** codeunit.

- A new integration event to filter the types of order documents that are retrieved from a particular channel for a given order has been added to the **CSM Order Management** codeunit.
- A new integration event that permits the modification of an order's last run timestamp following the execution of a single automation task has been added to the **CSM Order Management** codeunit.
- A new integration event making it possible to override the manner in which customer ledger entries for various activities has been added to the **CSM Order Document** table.

Channel Foundations

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

- To support an upcoming Shopify integration, functionality has been added to support the retrieval of order risk information from a connected platform:
 - A **Retrieve Order Risk** field has been added to the **CSM Sales Channel** page. Enabling this field will instruct CSM to retrieve order risk information.
 - A **Order Risk** field has been added to the **CSM Order** and **Channel Orders** pages. This field presents the results of retrieved order risk information from a channel.
- To support an upcoming Shopify integration, it is now possible to dictate the order in which a configurable item attribute's option values are sequenced. CSM will copy the option value sequence from the item variation to the related CSM attribute values. From here, these values will be communicated to Shopify according to this sequence.
- To support an upcoming BigCommerce integration, support for BigCommerce refund quotes have been added to CSM.

Corrections

- CSM's automation routines would sometimes fail with a G/L inconsistency error if balancing accounts were not assigned to the relevant payment methods. This has been corrected.
- Attempting to create a sales order from a CSM order with a coupon value that exceeded the total amount of the order items would fail for some platforms. This has been corrected.
- The parent key in certain global key variables was not being cleared/reset between transactions, resulting in data being inserted multiple times on the same order. This has been corrected.
- When creating a sales order from a CSM order, CSM would assign the primary contact from the customer card, rather than the contact assigned to the related CSM customer. This has been corrected.
- If a customer in Business Central had an assigned ship-to code, this code was being included on sales orders that were created from CSM orders, even if the retrieved order information differed from the default ship-to. This has been corrected to leave the ship-to code blank on any sales orders created by CSM.
- Certain Amazon financial transactions were not being entered as part of the related Amazon financial event transaction. This was a CSM Core issue, and has been corrected.
- Miscellaneous inaccuracies were corrected on various CSM page tooltips.

Miscellaneous

- A *CSM* prefix has been added to the captions for assorted pages to prevent confusion when similar objects from the standalone API Engine are present in the same environment.



In-Depth Features

It is possible to create CSM listings directly from the Item card in Business Central.

To use this functionality, you must first select an option in the **Default SKU Method** field on the **Listing Management** FastTab of the **CSM Sales Channel** page. In this field, you indicate the method by which sales channel SKU values will be assigned to new CSM listing records. A sales channel SKU identifies the CSM listing as a unique record for the CSM sales channel. Sales channel SKUs can be assigned from an item's number; a combination of an item's number, variant, and unit of measure; item identifier; or barcode values.

Once you have defined a default SKU method, you can create listings from the Item card:

1. Open the item record for which you want to create listings.
2. On the **Auto Create CSM Listings** FastTab, choose an available line.
3. In the **Sales Channel Code** field, enter or use the lookup to assign the sales channel that will have a listing.

The sales channel's default SKU method is automatically assigned to the line. If the item has an existing value that corresponds to this SKU method, it will be automatically entered in the **Channel Item SKU** field.

4. If the line does not have a value in the **Channel Item SKU** field, you must enter one.
5. If you wish to create a listing for a specific item variant or unit of measure, adjust the values in the corresponding fields.
6. Repeat steps 3-5 on subsequent lines if you want to create listings for the item on other sales channels.
7. When you are ready to create the listing for a given sales channel, change the value in the **Auto Creation Status** field to *Ready*.
8. Choose the **Auto Create CSM Listings** menu option in the FastTab ribbon, then choose the **Create CSM Listings** action.
9. Choose the **Yes** button on the message asking you if you want to proceed.

CSM will attempt to create a new listing record for the selected line(s). If this process is successful, the line(s) will be removed from the **Auto Create CSM Listings** FastTab. If the process fails, a message explaining the failure will be presented in the **Error Text** field. Common reasons for failure include the auto creation status not set to *Ready* or the item already having a listing for the relevant sales channel.

You can also configure CSM to automatically create listings for any auto creation lines as part of a scheduled automation routine. To do so, you must create and schedule the AUTOCREATELISTINGS automation process to occur as part of your CSM listing automation.

Note: the AUTOCREATELISTINGS automation will be included with the next release of each supported platform integration, so depending on when your relevant platform's next release was issued, it may not be necessary to go through the process of manually setting this up for your sales channels.

To create the AUTOCREATELISTINGS automation:

1. Open the sales channel for which you want to automate listing creation.
2. Choose the **Actions** ribbon, then select the **API and Automation** group and choose the **Automation List** action.
3. On the **CSM Automation List** page, enter a new line with the following values:
 - **Sales Channel Code:** this will automatically default to the code of the sales channel from which you opened the page.



- **Automation Type:** select the *Listing* option.
- **Sequence:** sequence this automation to occur in the same general range as your other listing automations.
- **Code:** enter a code of *AUTOCREATELISTINGS*
- **Codeunit ID Code:** enter a code of *LISTINGMGTDEFAULT*
- **Scheduled:** place a check mark in this field.
- **Scheduled Frequency:** assign a frequency to the automation. The same frequency that is being used for your other listing automations is probably sufficient.
- All other fields can retain their default settings.

Once this automation routine is created, you can include it as part of your existing automation activities. When this automation routine is executed, CSM will attempt to create new listings for any auto creation lines with a *Ready* status.

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	70338213	CSM Order Header Archive	Modified
Table	70338220	CSM Sales Channel	Modified
Table	70338221	CSM Order Header	Modified
Table	70338223	CSM Order Document	Modified
Table	70338240	CSM Listing	Modified
Table	70338241	CSM Listing Children	Modified
Table	70338258	CSM Order Document Transaction	Modified
Table	70338259	CSM Order Archive Doc. Trans.	Modified
Table	70338264	CSM Auto Create Item Listing	Created
Page	70338200	CSM Setup	Modified
Page	70338213	CSM Order Archive List	Modified
Page	70338219	CSM Order Archive	Modified
Page	70338220	CSM Sales Channel	Modified
Page	70338221	CSM Order	Modified
Page	70338240	CSM Listing	Modified
Page	70338241	CSM Listing Children List	Modified
Page	70338246	CSM API Credentials	Modified
Page	70338247	CSM API Shared Sessions	Modified
Page	70338255	CSM Sales Channels	Modified
Page	70338256	CSM Orders	Modified
Page	70338283	CSM Order Document Transactns.	Modified
Page	70338284	CSM Order Archive Doc. Trans.	Modified
Page	70338296	CSM Auto Create Item Listings	Created

Object Type	Object ID	Object Name	Action
Codeunit	88000	CSM Test Install	Modified
Codeunit	88000	Perm.PermissionSet	Created
Codeunit	88001	CSMCoreTestAzureKeyVault	Modified
Codeunit	88002	CSM Core Test Response Mgmt	Modified
Codeunit	88003	CSM Core General Test	Created
Codeunit	88004	CSM Request Management Test	Modified
Codeunit	88005	CSM Core Test Utility Library	Modified
Codeunit	88006	CSM Response Management Test	Modified
Codeunit	88007	CSM Listing Management Test	Modified
Codeunit	88008	CSM Return & Refund Test	Modified
Codeunit	88009	CSM Sales Operation Rules Test	Created
Codeunit	70338200	CSM API Utility Functions	Modified
Codeunit	70338203	CSM API Request Management	Modified
Codeunit	70338204	CSM API Response Management	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	70338209	CSM Create Sales Order	Modified
Codeunit	70338212	CSM Load Core Data	Modified
Codeunit	70338217	CSM Sales Operation Rules Mgt.	Modified
Codeunit	70338223	CSM SENAPI Management	Created
Codeunit	70338224	CSMCORE APIEngineDataLoad	Created
Enumeration	70338225	CSM Order Processing Action	Modified
Enumeration	70338235	CSMCORE Sales Channel Type	Created
Enumeration	70338236	CSMCORE Order Risk	Created
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
PageExtension	70338212	CSM Item Card	Created	Item Card



Integration Events

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

Object Type	Object ID	Object Name	Integration Events
Table	70338220	CSM Sales Channel	<ul style="list-style-type: none">OnLoadAPIEngineAPISet
Table	70338223	CSM Order Document	<ul style="list-style-type: none">OnGetCustLedgerEntryNo
Table	70338264	CSM Auto Create Item Listing	<ul style="list-style-type: none">OnBeforeCreateCSMListingFromAutoCreateItemListingOnAfterCreateCSMListingFromAutoCreateItemListing
Codeunit	70338205	CSM Order Management	<ul style="list-style-type: none">OnBeforeCreateSalesChannelReturnOrderDocLineOnGetAPIFunctionForRetrieveOrderRiskOnBeforeChannelRefundResponseVerifiedOnCreateSalesChannelCrMemoDocumentTransactionLinesOnBeforeFilterCSMOrderDocumentTransactionsOnBeforeRetrieveOrderRiskOnAfterRetrieveOrderRisk
Codeunit	70338206	CSM Order Mgt Automation	<ul style="list-style-type: none">OnProcessAutomationOnBeforeValidateLastRunTimestamp
Codeunit	70338207	CSM Listing Management	<ul style="list-style-type: none">OnBeforeSubmitProductAttributeValuesToChannel