

Suite Engine Channel Sales Manager Release Notes

Product: Channel Sales Manager for BigCommerce

Release: 3.4

Version: 3.4.2024012723.117561

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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 Suite Engine cannot be held responsible for any issues that arise out of installing this release into an out-of-date environment.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 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 sell gift certificates and virtual products on a BigCommerce order and retrieve this information as part of a sales order in Business Central. See the [in-depth feature description](#) for more details.
- Support has been added for accepting gift certificates and store credit as payment methods:
 - Changes have been made to the **CSM Payment Method** table so that payment methods for gift certificates and store credit can be identified as such.

- Order creation and payment application functionality has been adjusted to accommodate multiple payment methods (for example, a combination of gift certificate, store credit, and credit card payment) for a single order.
- A new **BigCommerce Grand Total** field has been added to the **CSM Order Header** table to accommodate the manner in which BigCommerce applies gift certificates and store credit to orders.

See the [in-depth feature description](#) for more details.

- 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 BigCommerce, where the relevant order is updated accordingly. See the [in-depth feature description](#) for more details.
- It is now possible to define a product status for a CSM listing. When the CSM listing is sent to an external BigCommerce channel, this setting will be used to determine the status of the product in BigCommerce. In this way, you can control the manner in which a product is made available for sale on your BigCommerce channel when it is sent from Business Central.
- A new AUTOCREATELISTINGS automation has been added to *CSM for BigCommerce*. This leverages a recent CSM Core enhancement that permits the automatic creation of CSM listings from the item card.

Corrections

- Miscellaneous corrections were made to field captions on the setup wizard.

Miscellaneous

- An Install codeunit was added to *CSM for BigCommerce*.
- The default dataload settings for *CSM for BigCommerce*'s BUILDSALESCREDITMEMO automation routines were adjusted to turn off all automatic sales document creation and scheduled settings. This is to prevent the inadvertent retrieval of refund information into Business Central as part of a *CSM for BigCommerce* update/installation.

In-Depth Features

Selling Virtual Products and Gift Certificates

CSM supports the selling of virtual products and gift certificates on your BigCommerce storefront. There are, however, some setup changes to take into consideration if you want to sell these products:

- Virtual products are still set up as products in BigCommerce and must be mapped to one of the supported record types (CSM listing, item, item identifier, etc.) in Business Central
- If you sell gift certificates, BigCommerce will create sale orders with a *giftcertificate* value on the order lines. You must map this value to one of the supported record types (CSM listing, item, item identifier, etc.) in Business Central.
- If a BigCommerce order is comprised entirely of virtual products or gift certificates, BigCommerce will not assign a shipping method to it. If you sell virtual products or gift certificates, it is recommended that you set up a CSM shipping method with a **Sales Channel Shipping Method** of blank and a shipping agent code for something like *NONE* or *VIRTUAL*. This will allow CSM to assign a shipping agent code to sales orders that contain only virtual products and/or gift certificates.

- If a BigCommerce order is comprised entirely of virtual products or gift certificates, it is retrieved into Business Central with a status of *Completed*. This will result in a failure to build a sales order, since the default order status matrix settings in *CSM for BigCommerce* assign a CSM order status of *Error* to any order with a BigCommerce status of *Completed* and no existing sales order in Business Central. If you sell virtual products or gift certificates, it is recommended that you update the related order status matrix line to have an implied order status of *New* rather than *Error*.

Accepting Gift Certificates and Store Credit as Payment Methods

It is now possible to accept gift certificates and store credit as payment methods on your retrieved orders.

Setup

If you accept gift certificates and/or store credit as payment methods on your sales channel, you need to set these up as CSM payment method types. By default, BigCommerce uses dedicated *bigcommerce_gift_certificate* and *bigcommerce_store_credit* codes for these types; these will be automatically loaded when you execute the **Retrieve Payment Methods** action in the **CSM Payment Methods** window.

To set up payment methods for gift certificates and store credit:

1. In the **Payment Method Code** field, use the AssistButton to assign a Business Central payment method code to the payment method.

The payment method codes you assign to these lines must have a defined balancing account in Business Central in order to properly record activity. It is recommended that you assign a liability account from your balance sheet as this balancing account.

2. Place check marks in the **BigCommerce Store Credit** and **BigCommerce Gift Certificate** fields for the relevant CSM payment method lines. This will allow CSM to properly adjust the order total on CSM orders that include these payment methods.

Order Processing

CSM will retrieve any gift certificate and/or store credit payments for a BigCommerce order and enter them as separate payment lines on the CSM order's **CSM Order Documents** FastTab. Depending on how you have configured your payment methods, CSM may automatically create and apply payment entries in the customer ledger based on these order document lines as part of the posting process.

A new **BigCommerce Grand Total** field has been added alongside the existing **Channel Order Total** field for CSM orders. This is due to the way in which BigCommerce handles gift certificates and store credits. Rather than treating these activities as payments, BigCommerce processes them as discounts and reduces the order total. The value in the **BigCommerce Grand Total** field presents the value of

the order as it has been retrieved from BigCommerce while the **Channel Order Total** field presents this amount plus any amounts from gift certificate and/or store credit order document lines.

For example, if we have an order with an amount of \$100 and apply a \$25 gift certificate, BigCommerce would record the order as having an amount of \$75. When this order is retrieved into CSM, separate payment lines for the gift certificate amount and the other payment method would be entered in the **CSM Order Documents** FastTab. The \$75 order total from BigCommerce would be entered in the **BigCommerce Grand Total** field, and the \$25 from the order document line for the gift certificate would be added to this amount, resulting in a value of \$100 in the **Channel Order Total** field.

Sending Sales Returns from Business Central to BigCommerce

It is possible to initiate a return order from Business Central and then send this to the corresponding order on your external BigCommerce platform.

Setup

It is recommended that you set up return reason codes that you can assign to the return order lines you generate for your BigCommerce 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 BigCommerce.
- **Send Refund Cr. Memo When:** select the method by which credit memo information will be sent to BigCommerce.
 - *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 BigCommerce, and these fields can be ignored for your BigCommerce channels.

BigCommerce also provides a number of different ways in which a refund payment can be processed. You can define the default method for both customers and guests on the sales channel:

- **Customer Refund Payment Selection Method:** select the default payment method for refunds that are created from customer orders, which in this instance refers to customers who have set up an account on your BigCommerce platform.
 - *Original Payment Methods:* refunds will be paid out to the payment method that was used for the original sales order. For example, if a sales order was paid with a credit card, the refund would be made to that credit card's account.
 - *Manual Selection:* users will manually choose the way in which refund payments are made on an order-by-order basis.
 - *Store Credit Only:* refunds will be paid as store credit to the customer's account in BigCommerce.
 - *Offline/custom:* information about the refund will be communicated to BigCommerce, but BigCommerce will not process the transaction. In this scenario, the refund must be processed through an external activity (directly through the payment provider, for example) or via a custom extension.
- **Guest Refund Payment Selection Method:** select the default payment method for refunds that are created from guest orders, which in this instance refers to customers that have not set up an account on your BigCommerce platform. The options for this field are the same as those for the **Customer Refund Payment Selection Method** field, with one exception being that *Store Credit Only* is not an option. This is because BigCommerce does not permit store credit for guest customers.

Creating and Releasing 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. CSM will also not allow you to create a return order if the **External Requires Update** field for any shipment or credit memo order documents on the related CSM order is set to *True*. This will prevent the creation of a return for an order that has not been properly shipped or credited.

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 BigCommerce.*

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.

Selecting Payment Methods and Posting Return Orders

Depending on what [refund payment selection method has been defined for your BigCommerce sales channel](#), it may be necessary to choose the payment method you want to use for the refund before you can post it. Payment methods can be defined for both customer and guest orders, which in this instance refers to those customers who have set up an account on your BigCommerce platform versus those who have not. The **Guest Customer** Boolean on the **Channel Data** FastTab of the **CSM Order** page indicates whether an order is a guest order; this setting will determine whether CSM applies the channel's customer or guest refund payment method.

If the selected refund payment method for the CSM order is *Manual Selection*, you must manually select the payment method(s) that you want to use; if you attempt to post the sales return without selecting a payment method, an error message will be presented instructing you to do so. If you have any other payment method type selected, CSM will automatically attempt to select the relevant payment methods at the time of posting, meaning that you may proceed to posting the sales return. You can, however, choose to manually select different payment methods if you wish.

To select refund payment methods:

1. On the **Sales Return Order** page, choose the **Actions** ribbon, then select the **Functions** group and choose the **Select Refund Payment Methods** action.

The **Refund Payment Method Selection Worksheet** page presents the payment methods that are available for selection. The number of available payment methods depends on the way in which the original transaction was processed. The final line in the list of available payment methods will always be the *custom* option for the full amount of the refund, meaning that you can always choose to instruct BigCommerce to not process a payment method because you wish to do so offline/externally.

If a gift card/certificate was used to pay for some or all of the original sales order, there are certain rules as to how it may be refunded:

- If the order is a customer order, gift certificate refunds can be recorded to store credit or handled as a custom, offline option.
 - If the order is a guest order, gift certificate refunds can only be handled as a custom, offline option (remember that it is not possible to process refunds to store credit for guest orders).
2. Place a check mark in the **Selected** field for the payment method(s) you want to use for the refund. The total value of the selected payment selection worksheet lines must equal the order balance.
 3. Choose the **Close** button.

***Note:** the **Total Selected Payment** field for the sales return order document line on the **CSM Order Documents FastTab** of the related CSM order will present the amount that has been selected for payment on the **Refund Payment Method Selection Worksheet** page. If this amount does not equal the total payment amount of the sales return, it will be presented in **red**; if the values match, it will be presented in **green**. Again, it should be noted that CSM will automatically attempt to select payment methods if your channel is configured to use anything other than manual payment method selection, meaning that the presence of a zero value in the **Total Selected Payment** field may not be an issue.*

4. You can now post the sales return. 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 BigCommerce

After the sales return order is posted, CSM will send credit memo information to BigCommerce. The manner in which this is sent depends on the selected value in the **Send Refund Cr. Memo** field on your BigCommerce 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 BigCommerce, BigCommerce will process/issue the refund according to the sales channel's refund payment method. Depending on the seller's balance on BigCommerce and other factors, this process may not be instantaneous.

When BigCommerce 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 BigCommerce.

Release Objects

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

Object Type	Object ID	Object Name	Action
Page	70338425	CSM BigComm Setup Wizard	Modified
Page	70338426	CSMBIG Refund Pmnt. Method Wks	Created
Codeunit	70338432	CSM BigCommerce Upgrade	Modified
Codeunit	70338433	CSMBIG Define UpgradeTags	Modified
Codeunit	70338434	CSMBIG Listing Mgt Test	Created
Codeunit	70338435	CSMBIG Return Refund Test	Created
Codeunit	70338436	CSMBIG Install	Created
Codeunit	70338447	CSM BigCommerce Test Library	Modified
Codeunit	70338448	CSM BigCommerce Test	Modified
Enumeration	70338428	CSMBIG Pmnt. Selection Method	Created

Object Type	Object ID	Object Name	Action
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	Modified	CSM Sales Channel
TableExtension	70338434	CSMBIG CSM Payment Method	Created	CSM Payment Method
TableExtension	70338435	CSMBIG CSM Order Header	Created	CSM Order Header
TableExtension	70338436	CSMBIG CSM Order Header Archiv	Created	CSM Order Header Archive
TableExtension	70338437	CSMBIG Order Document Transact	Created	CSM Order Document Transaction
TableExtension	70338438	CSMBIG Order Archive Doc Trans	Created	CSM Order Archive Doc. Trans.
TableExtension	70338439	CSMBIG Order Document	Created	CSM Order Document
TableExtension	70338440	CSMBIG Order Archive Document	Created	CSM Order Archive Document
PageExtension	70338426	CSM Order Big Commerce	Modified	CSM Order
PageExtension	70338428	CSM Sales Channel BigCommerce	Modified	CSM Sales Channel
PageExtension	70338430	CSM Listing BigCommerce	Modified	CSM Listing
PageExtension	70338435	CSM Order Archive BigCommerce	Modified	CSM Order Archive
PageExtension	70338440	CSM Payment Methods BigComm	Modified	CSM Payment Methods
PageExtension	70338443	CSMBIG Order Document Transact	Created	CSM Order Document Transactns.
PageExtension	70338444	CSMBIG Order Archive Doc Trans	Created	CSM Order Archive Doc. Trans.
PageExtension	70338445	CSMBIG Sales Return Order	Created	Sales Return Order
PageExtension	70338446	CSMBIG Order Documents	Created	CSM Order Documents
PageExtension	70338447	CSMBIG Order Archive Documents	Created	CSM Order Archive Documents
EnumerationExtension	70338426	CSMBIG Product Status	Created	CSM Product Status

Integration Events

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

Object Type	Object ID	Object Name	Integration Events
Codeunit	70338426	CSM Big Commerce Response Mgt	<ul style="list-style-type: none"> OnAfterRefundQuoteOrCreateResponse

Object Type	Object ID	Object Name	Integration Events
Codeunit	70338427	CSM Big Commerce Utility Funct	<ul style="list-style-type: none"> • OnBeforeGetOrderTransactionsForCSMOrderOperation • OnAfterGetOrderTransactionsforCSMOrderOperation • OnBeforeAdjustCSMOrderChannelOrderTotal • OnAfterAdjustCSMOrderChannelOrderTotal • OnBeforeGetReturnReasonForCSMOrderDocumentLine