Magento OpenERP Integration Documentation

Release 1.0

Openlabs Technologies & Consulting (P) Limited

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Introduction

Magento is a feature-rich eCommerce platform built on open-source technology that provides online merchants with unprecedented flexibility and control over the look, content and functionality of their eCommerce store.

A new bridge between OpenERP and Magento has been initiated by Openlabs team. This module allows synchronization of Magento with Open ERP. It supports Synchronization of Customers, Addresses, Product Categories, Products, Order Statuses, and Orders.

See Installation first, then to login to the ERP, see Login Instructions.

1.1 Installation

Step 1: Installation of Magento core API extension

1. After login to magento Admin Panel, go to

System >> Magento Connect >> Magento Connect Manager

n Magento ⁻ Admin Panel		Glob	al Record Sea	Irch	Logged in as admin Friday, July 12, 2013 <u>Try Magento Go for Free</u> <u>Log Out</u>		
Dashboard Sales Catalog Mobile Customers Promotio	ons Newsletter	CMS	Reports	System	Set help for this page		
Latest Message: Magento CE 1.6.1.0-stable Now Available Read details				My Account	ajor, 19 minor and 39 notice unread message(s). Go to messages inbox		
One or more of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date; Product Flatence of the Indexes are not up to date; Product Flatence of	at Data, Category Produ	icts, Catalo	g Search Index	Notifications	x Management and rebuild required indexes.		
				Tools	4		
Dashboard				Web Services	4		
				Design			
Choose Store View: All Store Views 💠 😡		Import/Export	4				
				Manage Currency	4		
Lifetime Sales				Transactional Emails			
	Orders Amounts		unts	Custom Variables			
\$0.00				Permissions	4		
				Magento Connect	Select Range: Last 24 Hours \$		
Average Orders				Cache Manage	agento Connect Manager		
\$0.00				Index Managen	ckage Extensions		
				Manage Stores			
Last 5 Orders				Order Statuses			
Customer Items Grand Total				Configuration			

2. Key in your username and password, the same username and password you entered while login to magento

Log In Plase re-enter your Magento Administration Oredenials. Coy administrators with Lip permissions will be able to log in. Username: admini Password:
--

3. Click on the second tab for settings and change preferred state to 'Beta'. (As of this date the plug-in is beta). Save your settings

Settings Magento Extensions are available in three different versions. Stable means the extension can be used in a production environment. Beta means the extension is not recommended for use in a production environment. Alpha means the extension is not recommended for use in a production environment. Alpha means the extension is still in development. Preferred State: Preferred State: Development. Deployment Type: Development Connection Development Development Connection Development Devel	Extensions Settings	Return to Admin Log Out
 Stable means the extension can be used in a production environment. Beta means the extension is not recommended for use in a production environment. Alpha means the extension is still in development. Please note: extensions are provided as is. Make sure to backup your data before installing new extensions. Magento Connect Channel Protocol: Http://petred State: Preferred State: Permission to create new files and folders. Use custom permissions: No Deployment. Deployment Type: Image: Content of the state of the	Settings	
 Beta means the extension is not recommended for use in a production environment. Alpha means the extension is still in development. Please note: extensions are provided as is. Make sure to backup your data before installing new extensions. Magento Connect Channel Protocol: Http: Preferred State: Permission to create new files and folders. Use custom permissions: No Deployment. Deployment Type: Image: Content of the state of the s	Magento Extensions are available in three different versions.	
Magento Connect Channel Protocol: Http = = = = = = = = = = = = = = = = = =	Beta means the extension is not recommended for use in a production envir	onment.
Preferred State: Permission to create new files and folders. Use custom permissions: No Deployment. Deployment Type: OLcal Filesystem	Please note: extensions are provided as is. Make sure to backup your data b	efore installing new extensions.
Use custom permissions: No : Deployment. Deployment Type: OLcal Filesystem		\$
Deployment. Deployment Type: CLocal Filesystem	Permission to create new files and folders.	
Deployment Type: OLocal Filesystem	Use custom permissions: No	\$
	Deployment.	

Note: Default state is Stable, change it to Beta.

4. Go to first tab i.e., Extensions to install magento-connector,

Extensions) Settings	Return to Admin Log Out
Settings	
Put store on the maintenance mode while installing/upgrading/backup cre	ation
Create Backup Database ÷	
Install New Extensions	
1 Search for modules via Magento Connect.	
2 Paste extension key to install:	Install
Direct package file upload	
1 Download or build package file.	
2 Upload package file: Choose File No file chosen Uploa	d

5. You need to paste the following extension key in the box to install:

http://connect20.magentocommerce.com/community/Openlabs_OpenERPConnector

Extensions Settings	Return to Admin Log Out
Settings	
Put store on the maintenance mode while installing	upgrading/backup creation
Create Backup Database	+
Install New Extensions	

6. Click Install, and wait for the module to be shown for installation

nsions Settings	Return to Admin	Log Out
Sottings		
Put store on the maintenance mode while installing/upgrading/backup creation		
Create Backup Database :		
Install New Extensions		
1 Search for modules via Magento Connect.		
2 Paste extension key to install: http://connect20.magentocommerce.com/community/C	Install	
Direct package file upload		
Download or build package file. Please wait		
2 Upload package file: Choose File No file chosen Upload		

7. Install it by clicking Proceed, refer below screenshot:

Extensions Se	ttings		Return to Admin	Log Out			
Settings							
Put store on the maintenance mode while installing/upgrading/backup creation							
Create Backup Database \$							
Install New Extensions							
1 Search for modules via Magento Connect.							
2 Paste extension key to install: http://connect20.magentocommerce.com/community/(install							
Extension dependen	cies						
Channel	Package Name	Version	Status				
community	Openlabs_OpenERPConnector	1.4.1 (beta)	Ready to	install			

8. The terminal shows the module installed, like shown below:

Mage_Downloader	1.7.0.1 (stable)	\$	Magento Downloader	
Mage_Locale_en_US	1.7.0.1 (stable)	\$	en_US locale	
Magento_Mobile	1.7.0.1.22.1 (stable)	+	Magento Mobile Xml Interface	
Phoenix_Moneybookers	1.3.1 (stable)	\$	Moneybookers payment gateway	
			integration	
Auto-scroll console contents Checking dependencies of pack Installing package community/ Package community/Openlabs_Op Package installed; community Openlabs_OpenERPCo Cleaning cache Cache cleaned successfully	Openiabe_OpenZBPConnector	alled succes		
Procedure completed. Please check the	ne output frame for useful informa	ation and refresh	h the page to see changes.	
Refresh				
Help Us to Keep N	fagento Healthy - <u>Report All Bugs</u> ((Magento Connec	t Manager ver. 1.7.0.1)	_
Magan	to is a trademark of Maganto Inc. Co	onuriabt @ 2012 M	lagento Inc.	

9. Now go to bottom of the page to check the installed module, where installed module is shown at the end of the list, see below:

Jb_ZF_Locale 1.11.1.0 (stable) 2end Framework Locale Arge_All_Latest 17.0.2 (stable) + Arge_Centinel 1.70.0 (stable) = Arge_Compiler 1.70.0 (stable) = JD_Secure Card Validation This module compiles all files of a Magento increase a singler increase a
Asge_Centinel 1.7.0.0 (stable) = 3D Secure Card Validation Asge_Compiler 1.7.0.0 (stable) = This module compiles all files of a Magento installation and creates a
Agge_Compiler 1.7.0.0 (stable) : This module compiles all files of a Magento installation and creates a
Magento installation and creates a
performance
Mage_Core_Adminhtml 1.7.0.1 (stable) Agento Administration Panel
Mage_Core_Modules 1.7.0.2 (stable) Collection of Magento Core Modules
Mage_Downloader 1.7.0.1 (stable) Alignment Address Magento Downloader
Mage_Locale_en_US 1.7.0.1 (stable) = en_US locale
Vagento_Mobile 1.7.0.1.22.1 (stable) Agento Mobile Xml Interface
Phoenix_Moneybookers 1.3.1 (stable) Moneybookers payment gateway integration
Openlabs_OpenERPConnector 1.4.1 (beta) : Magento core API extension for multi website Open ERP connector by Openlabs

Step 2: Installation of Magento Integration [OpenERP module]

Setup Python environment

- 1. If not already installed by the default python installation, download the pycountry module and install it in your python directory
- 2. Download the magento module and install it in your python directory (*)

(*) it seems that in linux installations, Magento Integration takes care of 'magento module' and installs it when running the Magento Integration setup (see .5 below). So you have to install it yourself only if you are working under windows systems because for some reason Magento Integration lacks to install the 'magento module' (to be confirmed by developers)

(if your openERP is installed on a Windows systems, copy the above modules from YourPythonDir\Lib\site-packages to YourOpenErpDir\Server)

Downloading the magento_integration module

- 1. The module source is available online and can be downloaded from here.
- 2. The module can be downloaded as a *zip* or can be *cloned* by running

git clone https://github.com/openlabs/magento_integration.git

OR

git clone git@github.com:openlabs/magento_integration.git

3. If the module is downloaded as a zip, extract the module which will give a directory.

Warning: The directory name of the extracted contents should be *magento_integration*. The module will not work otherwise as OpenERP identifies modules by the folder name. If you are downloading the source from github, the folder name created includes the branch name like *magento_integration-develop*.

- 4. Copy this directory to **addons** folder of openerp. [Advanced users can update the addons path to add this module's parent folder in their server config file.]
- 5. From the module directory, use the setup.py script with the command:

python setup.py install

Installing the module in OpenERP database

1.1.1 Login to OpenERP

To login to ERP using OpenERP client, you need to fill the following information:

- Username: Ask your administrator for this information
- Password: Ask your administrator for this information

	Database: magento_doc
OPEN SOURCE BUSINESS APPLICATIONS	
Username	
admin	
Password	
Log in	
Manage Databases Powered by OpenERP	

- 1. Go to Settings, click on Update Modules List shown under Modules
- 2. Search for magento module in the search bar at top-right side of the page.
- 3. Search returns the module named Magento Integration, now click on the module to install, refer below screenshot:

Messaging Sales Invoicing	Magento Reporting Settings	🖂 🖻	🔟 Administrator 👻
Opéñ ERP	Installed Modules	Q Module Magento x	
Modules Apps Updates Installed Modules Update Modules List Apply Scheduled Upgrades	Magento Integration Magento Integration magento_Integration Installed		
Configuration Sales Involcing General Settings			=
Companies Company's Structure			
Users Groups Users Translations			
Languages Load a Translation Import / Export			
Technical ▶ Email ▶ Actions			
Powered by OpenERP			

4. A new window is now open to install this, click on Install.

Sales Settings	-			_		🔺 💿 Administrator 👻 🄶
Open ERP	Installed N	lo / Mage	nto Integration	_		
Modules			Print v More v			:: = 🔲
Apps						
Updates Installed Modules			lagento Integration			
Update Modules List			lagento Integration			
Apply Scheduled Upgrades			Install			
Companies Companies Company's Structure		Author Category	Openlabs Technologies & Consulting Pvt Ltd. Specific Industry Applications	Technical Name License	magento_integration	
Users Groups				Latest Version	7.0.0.1	
Users		Description	Technical Data			
Translations		Description	Technical Data			
Languages						
Load a Translation Import / Export			This module integrates C	penFRP wit	th magento.	
Application Terms			This will import the following:		in magente.	
Technical			Product categories			
Email			Products			
Actions			Customers Addresses			H
User Interface			Orders			
 Database Structure Workflows 						
Workflows Enterprise Process						
Conference Manual						
Powered by OpenERP						-

5. On installing this a new window pop-ups asking Configure Accounting Data details for your taxes and chart of accounts. Enter the details and Continue.

Sales Settings	▲ () Administrator 👻
Opéñ`ERF	Configure Accounting Data ×	
Modules Apps Updates Installed Modules Update Modules List Apply Scheduled Upgrades	Select a configuration package to setup automatically your taxes and chart of accounts. Accounting Package Indian - Accounting Company Your Company	
Companies Companies Company's Structure	Continue Opposite Industry Approximate Literate Allege OF Lo	=
Users Groups Users Translations Languages Load a Translation > Impot / Export > Application Terms Technical > Email > Actions > User Interface > Database Structure	Description Technical Data This module integrates OpenERP with magento. This will import the following: • Product categories • Product • Outdresses • Orders	

6. Now magento is installed. To configure it, refer Configuration.

Configuration

The module requires certain initial configuration to be done in magento instance to set the management tool.

2.1 Magento Instance

Go to Magento >> Configuration and open Magento Instances.

It refers to a magento installation identifiable via setting the API for Magento Site URL, API User and API Password / Key

1. Create a new magento instance by clicking create.

messaging buies involoning	inagento reporting octaings				motio
Opéñ ERP	Magento Ins / New Save or Discard				
Configuration					
Magento Instances	Test Connection Import Websites	J			
Website	1				
Website Store	Name				
Store View		enERP Integration			
	Company				
	Your Company	• Ct			
	Active				
	API Settings Magento Site URL				
	http://192.168.2.12:8	888/magento2			
	API User	admin	API Password / Key	openlabs	
	Websites				
	Name	Code	Instance		
Powered by OpenERP					

- 2. Save the record with the Save button.
- 3. The Connection can be tested by clicking on Test Connection button shown on the top.
- 4. If the connection with magento is successful, a window will pop-up as shown below in the screenshot:

Messaging Sales Invoicing	Magento Repo	orting Settings			⊻	🔺 🔟 Administrator 👻 🔒
Onen ERP	Magento I	ns / Magento O	penErp Integration			
Configuration	Test Con	nection			×	
Magento Instances Website Website Store Store View	Test conne	ction with magento su	ccessful			
	Close					
		Active API Settings Magento Site URL http://192.168.2.12:6 API User Websites	admin	API Password / Key	openiabs	
Powered by OpenERP		Name	Code	Instance		

5. Now the websites can be imported by clicking Import Websites button. This will import all the websites for this magento instance. It will also import all the stores and store views related to this website. By clicking this a new window will pop-up as shown below:

Messaging Sales Invoicing	Magento Report	ting Settings			× × × × × × × × × × × × × × × × × × ×	Administrator	
Open ERP	Edit Creat		enERP Integration	More +			ו
Magento Instances	Test Connection	on Import Websites					
Website							
Website Store Store View		Magento Op	enERP Integra	ation			
Store view		U					
		Import Websites				×	
		This wizard will impor the websites imported		s magento instance.	It will also import all the stores and store views	s related to	=
		Continue Close					
		API User	admin		API Password / Key admin123		
		Websites					
		Name	Code		Instance		
Powered by OpenERP							
			Code		Instance		
Powered by OpenERP							

To know more about Magento Website, refer website.

2.2 Magento Website

Go to Magento >> Configuration and open Website.

A magento instance can have multiple websites. They act as *parents* of stores. A website consists of one or more stores.

After Importing Websites, magento instance will get all the websites, it's stores and stores view. See below:

Messaging Sales Invoicing	Magento Repor	ting Settings				⊠ 4	🔒 💿 Administrator 👻
Opéñ`ERP	Magento In	ns / Magento Op	penErp Integrat	ion			
· · · · · · · · · · · · · · · · · · ·	Edit Crea						
Configuration Magento Instances	Test Connecti	on Import Websites					
Website							
Website Store Store View		Magento O	penErp Int	egration			
		Company Your Company					
		Active					
		API Settings					
		Magento Site URL http://192.168.2.12:8	888/magento2				
		API User	admin		API Password / Key	openlabs	
		Websites					
		Name	Code	е	Instance		
		Main Website	base	1	Magento OpenErp Integratior	ı	
		Website 2	webs	site2	Magento OpenErp Integratior	1	
Powered by OpenERP	Import Websites Magento OpenErp Integration Company Your Company Active						

Note: A website must be unique in an magento instance

2.3 Website Store

Magento Website Store or Store view groups

```
Go to Magento >> Configuration and open Website Store.
```

Messaging Sales Invoicing	Magento Reporting Settings	🖂 🚨 Admi	inistrator 👻 📤
Opéñ `ERP	Website Store	Q	87
	Create	1-3 of 3	
Configuration Magento Instances	Name	Website	
Website	Main Store	Main Website	
Website Store	store1_website2	website2	
Store View	store2_website2	website2	
Powered by OpenERP			Y

Stores are children of websites. The visibility of products and categories is managed on magento at store level by specifying the root category on a store. The setup for root catalog on stores does not reflect on OpenERP as there is

no functional benefit of doing so.

Note: A store must be unique in a website

Double click on any of of the website to import catalog by clicking on Import Catalog. This will import all the product categories and products for this magento instance, see screenshot:

	Magento Ins / Magento OpenERP Integration			
	Open: Websites	×		
Configuration Magento Instances	Import Catalog			
Website Website Store		H		
Store View	Import Catalog ×			
	This wizard will import all the product categories and products for this magento instance.			
	Continue Close	11		=
	Stores			
	Name Website			
	Main Store Main Website			
	Close			
Powered by OpenERP				- -

Press continue to import the catalog, and it will get all the products, see below screenshot:

Messaging	Sales	Invoicing	Magento	Reporting	Setting

Messaging Sales Invoicing	Magento Reporting Setti	ngs			🔺 间 Admi	nistrator
Opéñ ERP	Magento Ins / Ma Magento Instance I	agento Op… / Magento Ins… / Products	٩			0 -
Configuration	Create				1-80 of 120	• •
Website	Internal Reference	Name	Quantity On Hand	Quantity Available	Public Price	Status
Website Store	1111	Ottoman	0.00	0.00	299.99	
Store View	1112	Chair	0.00	0.00	129.99	
	1113	Couch	0.00	0.00	599.99	
Open ERP onfiguration Magento Instances Website Website Store	1114	Magento Red Furniture Set	0.00	0.00	0.00	
	1gbdimm	Crucial 1GB PC4200 DDR2 533MHz Memory	0.00	0.00	150.99	1-80 of 120 • • • Public Price Status 299.99 129.99 599.99 0.00
	1tb7200	Western Digital - 1TB HD - 7200RPM	0.00	0.00	399.00	
	1yr_p_l	One Year Extended Warranty - Parts and Labor	0.00	0.00	150.00	
	226bw	22" Syncmaster LCD Monitor	0.00	0.00	399.99	
	250gb5400	Seagate 250GB HD - 5400RPM	0.00	0.00	99.00	
	2gbdimm	Crucial 2GB PC4200 DDR2 533MHz Memory	0.00	0.00	199.99	
	2yr_p_l	Two Year Extended Warranty - Parts and Labor	0.00	0.00	Public Price Status 0.00 299.99 0.00 129.99 0.00 599.99 0.00 599.99 0.00 599.99 0.00 130.99 0.00 130.00 0.00 1399.99 0.00 199.90 0.00 199.90 0.00 399.99 0.00 250.00 0.00 399.99 0.00 325.00 0.00 325.00 0.00 329.09 0.00 329.00 0.00 299.00 0.00 299.00 0.00 299.00 0.00 299.00 0.00 99.99	
	1111 Ottoman 0.00 0.00 1112 Chair 0.00 0.00 1113 Couch 0.00 0.00 1114 Magento Red Fumiture Set 0.00 0.00 1gbdimm Crucial 1GB PC4200 DDR2 533MHz Memory 0.00 0.00 1tb7200 Western Digital - 1TB HD - 7200RPM 0.00 0.00 1yr_p_l One Year Extended Warranty - Parts and Labor 0.00 0.00 226bw 22" Syncmaster LCD Monitor 0.00 0.00 0.00 250gb5400 Seagate 250GB HD - 5400RPM 0.00 0.00 0.00 2gbdimm Crucial 2GB PC4200 DDR2 533MHz Memory 0.00 0.00 0.00 2gbdisth Two Year Extended Warranty - Parts and Labor 0.00 0.00 0.00 384822 Akio Dresser 0.00 <	399.99				
	3yr_p_l	Three Year Extended Warranty - Parts and Labor	0.00	0.00	325.00	O of 120 Image: Status 299.99 129.99 129.99 129.99 599.99 1000 150.99 1000 399.00 150.00 199.99 250.00 399.09 399.00 199.99 3250.00 300.00 299.00 299.00 299.00 161.94 101.94
	1b720 Western Digital - 1TB HD - 720RPM 0.00 0.00 1 tb720 One Year Extended Warranty - Parts and Labor 0.00 0.00 2 26bw 22" Syncmaster LCD Monitor 0.00 0.00 2 26bw 22" Syncmaster LCD Monitor 0.00 0.00 2 26bw 22" Syncmaster LCD Monitor 0.00 0.00 2 26bg/d00 Seegate 250GB HD - 5400RPM 0.00 0.00 2 2gbdimm Crucial 2GB PC4200 DDR2 533MHz Memory 0.00 0.00 2 2gbdimm Crucial 2GB PC4200 DDR2 533MHz Memory 0.00 0.00 3 24822 Akio Dresser 0.00 0.00 0.00 3 344822 Akio Dresser 0.00 0.00 0.00 3 yr_p_l Three Year Extended Warranty - Parts and Labor 0.00 0.00 4fasd5f5 The Get Up Kids: Band Camp Pullover Hoodle 0.00 0.00 500gb5400 Seagate 500GB HD - 5400RPM 0.00 0.00 500gb7200 Western Digital 500GB HD - 7200RPM 0.00 0.00	30.00				
	500gb5400	Seagate 500GB HD - 5400RPM	0.00	0.00	299.00	
	500gb7200	Western Digital 500GB HD - 7200RPM	0.00	0.00	299.00	
	512dimm	Crucial 512MB PC4200 DDR2 533MHz Memory	0.00	0.00	99.99	
	750	Olympus Stylus 750 7.1MP Digital Camera	0.00	0.00	161.94	
Powered by OpenERP	8525PDA	AT&T 8525 PDA	0.00	0.00	199.99	

Note: Each product in a website must be unique!

2.4 Store View

Magento Website Store View

Go to Magento >> Configuration and open Store View.

A store needs one or more store views to be browse-able in the front-end. It allows for multiple presentations of a store. Most implementations use store views for different languages.

See screenshot below, it will get all the Store View with corresponding Store

Messaging Sales Invoicing	Magento Reporting Settings		🖂 🧕 🤖 Administrator 👻
Opéñ `ERP	Store View	(9)	(
Open EKr	Create		1-5 of 5 📃 🔲
Configuration Magento Instances	Name	Code	Store
Website	English	default	Main Store
Website Store	French	french	Main Store
Store View	🔲 German	german	Main Store
	English	storeview2	Store 2
	English	store21	Store21
Powered by OpenERP			v

Create Sale Orders in Magento

Sales orders in Magento can created from Magento Admin Panel with Create New Button shown in below Create New Order screenshot. Sale in Magento

👘 N	lagento	Admin Panel	I				Glo	bal Record S	earch	L	.ogged in as adr	min W	ednesday, Ju	ıly 3, 2013	<u>Try Mager</u>	to Go for Fre	e Log Ou
Dasht	oard Sale	s Catalog	Mobile			Newsletter		Reports	System								
🕕 One o	r more of the C	ache Types are in	validated: B	locks HTML outp	out. Click here to go	to Cache Mana	gement and ref	resh cache typ	es.								
		ento CE 1.6.1.0-sta									1 critical, 4 maj). <u>Go to mes</u>	sages inbox
🕕 One o	r more of the Ir	idexes are not up	to date: Cat	alog URL Rewrite	es, Product Flat Da	ta, Category Pro	oducts, Catalog	Search Index,	Stock Status.	Click here to go t	o Index Manage	ement ar	id rebuild req	uired index	(es.		
🗐 Ord	ers														0	Create N	ew Order
Page 🕢	1 of 1	pages View	20 V pe	erpage Tota	l 2 records found	🔊 <u>New Or</u>	der RSS			6	Export to:	CSV	•	Export	Re	set Filter	Search
Select Vi	sible Unselec	ct Visible 0 item	s selected										Acti	ons		•	Submit
	Order #	Purchased From	n (Store)		Purchased On	↓ Bill to N	ame		Ship to N	lame		G.T. (Ba	ase)	G.T. (Pu	rchased)	Status	Action
Any 🔻					From: 📰							From:		From:			
				٦	То: 📰							To :		To :			
	40000001	Website 2 Store 2			lul 2, 2013 3:03:3 PM	4 Test cus	tomer last na	me	Test cust	omer last name			\$2,704.99		\$2,704.99	Pending	View
	100000001	English Main Website			lun 22, 2013 4:13	42 Chalabh			Chalabh	A			\$2.255.00		\$2.055.00	Deedies	Man
	10000001	Main Website Main Store English			PM	:12 Shalabr	n Aggarwai		Shalabh	Aggarwal			\$2,255.00		\$2,255.00	Pending	<u>View</u>
		0															

Orders in Magento

👔 Magento ⁻ Admin Panel			Global Record Sea	rch	Logged	in as admin Wedne	esday, July 3, 2013 ∣	Try Magento Go for F	Free Log (
Dashboard Sales Catalog	Mobile Customers Promotion	ns Newsletter CM	S Reports S	ystem				🕜 Get help	for this pag
One or more of the Cache Types are inva									_
Latest Message: Magento CE 1.6.1.0-stable					You have 1 criti	al, 4 major, 19 minor	and 39 notice unread	message(s). Go to m	essages inb
One or more of the Indexes are not up to	date: Catalog URL Rewrites, Product Flat	t Data, Category Products, Ca	talog Search Index, Sto	ck Status. C	lick here to go to Inde	< Management and re	build required indexes	i.	
order View	를 Order # 100000001 Jun :	22, 2013 4:13:12 PM			I Back	Edit Cancel	Send Email	Hold 🗵 Invoice	🗾 🗩 Shi
Information	Order # 100000001 (the order co	nfirmation email was sent	Ð		Account Informa	tion			
Invoices									
Credit Memos	Order Date	Jun 22, 2013 4:13:12	2 PM		Customer Nam	e	Shalabh Aggar	wal	
Shipments Comments History	Order Status	Pending			Email		sa@openlabs.c	<u>co.in</u>	
Transactions	Purchased From	Main Website Main Store			Customer Grou	IP	NOT LOGGED I	IN	
		English							
	Placed from IP	127.0.0.1							
	Billing Address			<u>Edit</u>	Shipping Addres	s			Ed
	Shalabh Aggarwal street 1				Shalabh Aggan street 1	val			
	street 1 street 2				street 1 street 2				
	test city, Delhi, 123456				test city, Delhi, 1	23456			
	India T: 2134567890				India T: 2134567890				
	Payment Information				Shipping & Hand	lling Information			
	Check / Money order Order was placed using USD				Flat Rate - Fixe	d \$5.00			
🖥 Order # 100000001 Jun 22, 20					Back	Edit Cancel	Send Email	Hold <u>র</u> Invoice	🗖 Shi
	Items Ordered								
	Product A test monitor	1	Ordered \$2,25		e Qty 50.00 Ordered 1		so.00 0%		t Row To \$2,250.0
	SKU: 226bw		0100100 02,20	•1,1		-1,200,000	0.00	•••••	
	Manufacturer Samsung								
	-								
	Comments History				Order Totals				
	Add Order Comments Status							Subtotal \$	\$2,250.00
	Pending V						Shippi	ing & Handling	\$5.00
	Comment								2,255.00
							_	Total Paid	\$0.00
							Т	otal Refunded	\$0.00 \$2,255.00
				11				i otari Due 🕴	
	Notify Customer by Email		Submit Comme	nt					
	Visible on Frontend								
	Jun 22, 2013 4:13:12 PM P	ending							
	Customer Notified 🖋								
Help Us Keep Magento Healthy - Report All Buc Interface Locale: Frantish (United States) / F		Мад	ento ver. 1.7.0.2					nnect with the Magen to™ is a trademark of	
Heb Us Keep Magento Healthy - Report Al Buc Interface Locale: English (United States) / E		Mag	ento ver. 1.7.0.2					nnect with the Magen to™ is a trademark of Copyright © 2013	Magento In
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How it Works

This section explains how import and export of orders between OpenERP and Magento works.

Note: All the data represented below is demo data and is only for demonstration purposes.

4.1 Orders are imported as Sales

Messaging Sales Invoicing	Magento Repo	orting Settings	_	_	🖂 🔺 🔟 A	dministrator 👻 🔶		
Open ERP	Store View	v / English						
Open LIM	Edit Cre	ate	More		1/5 🔶	• = •		
Configuration	Import Order	s Export Orders						
Magento Instances Website								
Website Store								
Store View		Name		Code				
		English		1.5.11				
		English		default				
		Store	Main Store	Instance	Magento OpenErp Integration			
		Website	Main Website	Company	Your Company			
		Last Order Import Time		Last Order Export Time	07/03/2013 16:38:21			
Powered by OpenERP						*		

Orders placed in Magento Admin Panel are imported in OpenERP from Store View. See below:

An order in Magento has a number of entities related and they are imported in OpenERP as described below:

- The Order is imported as a Sale. The sale in OpenERP can be identified by the Order Number which will be same as the order reference in Magento. Internally the matching is done using the ID of the order as returned by Magento.
- The date on which it order is generated
- The Customer who placed the order as a Sale.

• The products, i.e., the products bought in the order by the customer are imported as Sale lines. The product in each of these lines is created as product in OpenERP, if it does not already exist.

A window pop-ups to import all sale orders placed on this store view. Enter Continue, refer screenshot shown below:

Messaging Sales Invoicing	Magento Repo	orting Settings			🖂 🤷 🧾 Administrator 👻							
Opéñ `ERF	Import Orde	ers			x 1/5 • • = •							
Configuration Magento Instances Website Website Store Store View		This wizard will import all sale orders placed on this store view on magento after the Last Order Import Time. If Last Order Import Time is missing, then it will import all the orders from beginning of time. [This might be slow depending on number of orders.]										
	Continue											
		English		derault								
		Store	Main Store	Instance	Magento OpenErp Integration							
		Website	Main Website	Company	Your Company							
		Last Order Import Time		Last Order Export Time	07/03/2013 16:38:21							
Powered by OpenERP												

Order imported as Sales in OpenERP

Sales >> Sales Orders

Dpeñ ERP	Sales Orders	/ mag_100000	001					
open LIXI	Edit Create			Print - More -				
S	Create Invoice	Cancel Order			Draf	t Quotation	Quotation Sent	Sale to Invoice
stomers otations	Cleate Invoice				Dia		Quotation Sent	Sale to Invoice
les Orders								
		Sales Orde	er mag_10000	0001				
ucts oducts by Category			-					
oducts	c	ustomer	Shalabh Aggarwal		Date	06/22/2013		
iguration			street 1 street 2		Shop	Your Compa	ny	
it of Measure Categories			test city 123456		Customer Reference			
dress Book			Delhi India					
oducts								
		Order Lines Oth	er Information					
		Product		Description	Quantity	Taxes	Unit Price	Subtotal
		[test_monitor] A te	est monitor	A test monitor	1.000		2250.00	2250.00
		[226bw] 22" Synci	master LCD Monitor	22" Syncmaster LCD M	Nonitor 1.000		0.00	0.00
				Magento Shipping	1.000		5.00	5.00
	=							
						11-1		
						Untaxe	d Amount : Taxes :	2255.00 € 0.00 €
							Total :	2255.00 €
			Send a	nessage or Log a note			Follow	ving
		Quotation co	onfirmed				Discussions	-
			ner: Shalabh Aggarwal			☆ 🕹	Quotation s	
			Draft Quotation → Sale to d Amount: 2255.0	Invoice			Sales Order	r Confirmed
			updated document · about a min	ute ago • like			2 followers	Add others
		Document c	reated			~ ~	Adminis	
			updated document - about a min	ute ago • like		☆ 🏝		
							(in) Shalabh	Aggarwal X

Note: When the order import happens next time, the status of the orders in state in OpenERP will be updated if there is a change in state on Magento.

Product in OpenERP

Messaging Sales Invoicing	Magento Reporting Settings	🖂 🔺 🔁 🧕 Administrator 👻
Opéñ ERP	Products	(○ , ▼ Can be Sold x)
Sales Customers Quotations Sales Orders Products Products Products by Category Products Configuration Unit of Measure Categories Address Book Products	Create Image: price: 399.99 Image: price: 399.99	test_monitor) A test monitor Price: 1000.00
Powered by OpenERP		

The products bought in the order by the customer are imported. The product in each of the sale lines is created as product in OpenERP, if it does not already exist.

4.2 Cancellation Of Sale Order

Double click on the order from the sale order lines to edit it. To cancel the order click Cancel Order button as shown in below screenshot:

Open ERP	Sales Orde	ers / mag_400000	001				
Open LIM	Edit Crea	ite	Prin	t 👻 More 👻			*
Sales							
Customers	Create Invoice	Cancel Order			Draft Quotation Quotat	ion Sent Sale to Invoice	Done
Quotations							
Sales Orders			40000004				
Products		Sales Orde	r mag_400000001				
Products by Category							
Products		Customer	Test customer last name test street1	Date	07/02/2013		
Configuration			test street 2	Shop	Your Company		
Unit of Measure Categories			test city, AL 12345	Customer Refere	nce		
Address Book			United States				
▶ Products							
		Order Lines Othe	r Information				
		Product		Description	Quantity Taxes	Unit Price Subtotal	
		[VGN-TXN27N/B] S Notebook PC	Sony VAIO VGN-TXN27N/B 11.1"	Sony VAIO VGN-TXN27N/B 11.1" Notebook PC	1.000	2699.99 2699.99	

Now state has been changed to cancelled, see below

Cancelled Sale Order

	Edit Cr	eate	Prir	nt 👻 More 👻			
s stomers	New Copy of	Quotation			Draft Quotation	Quotation Sent Cancell	ed Do
otations							
Sales Orders Products Products by Category Products Configuration Unit of Measure Categories Address Book		Sales O	rder mag_400000001 Test street1 test street 2 test city, AL 12345 United States	Date Shop Customer Reference	07/02/2013 Your Company		
ducts		Order Lines	Other Information			Unit	
		Product		Description	Quantity Taxes	Price Subtotal	
		[VGN-TXN2 Notebook P	27N/B] Sony VAIO VGN-TXN27N/B 11.1" C	Sony VAIO VGN-TXN27N/B 11.1" Notebook PC	1.000	2699.99 2699.99	
				Magento Shipping	1.000	5.00 5.00	
					Untaxed Amo Tax	unt : 2704.99 € :es : 0.00 €	
					Tot	al : 2704.99 €	

Now to export the changes to Magento, refer export order

4.3 Exporting Order Status from OpenERP to Magento

Once the order is processed in OpenERP, the shipping status of the order based on delivery is updated on Magento by Export Order.

Messaging Sales Invoicing	Magento Repo	orting Settings			≥ ∆	Administrator 👻 ᄎ			
Opéñ ERF	Export Orde	Export Orders ×							
Configuration Magento Instances Website Website Store Store View	This wizard will export orders' status to magento for this store view. All the orders edited/updated after the Last Order Export Time will be exported. [NOTE: This feature is currently available only for Canceled Orders.]								
	Continue Clo								
		English		default					
		Store	Main Store	Instance	Magento OpenErp Integration				
		Website	Main Website	Company	Your Company				
		Last Order Import Time	07/03/2013 16:50:09	Last Order Export Time	07/03/2013 16:38:21				
Powered by OpenERP						v			

This will export order's status to magento for this store view

• The status of orders which are imported in OpenERP will be exported to Magento as *Cancelled* once they are marked *Cancelled* by editing sale order from OpenERP.

Canceled order in Magento

	oard Sale	s Catalog Mobile Cus	stomers	Promotions N	ewsletter CMS	Reports Sy	stem				0	Get help for	
		ache Types are invalidated: Blocks H					atom					Cot noip ior	uno pug
		ento CE 1.6.1.0-stable Now Available R			and re	incarroaciic typea.	You have 1 critica	al 4 major. 19 m	inor and 39 n	otice unrea	ad message(s	a). Go to mess	ages inbo
		ndexes are not up to date: Catalog UF			tegory Products, Catalo	Search Index. Stoc							
				, , , , , , , , , , , , , , , , , , , ,			······································						
Ord	ers										C	Create Ne	w Order
				_									
age 🖂	1 D of 1	pages View 20 ▼ per page	e Tot	al 2 records found 🔝	New Order RSS		🙀 Expo	ort to: CSV	•	Export	Re	set Filter	Search
Select Vi	sible Unselec	ct Visible 0 items selected							Acti	ons		▼ S	ubmit
	Order #	Purchased From (Store)			Bill to Name	\$	Ship to Name	G.T. (B	ase)	G.T. (Pu	rchased)	Status	Action
Any 🔻			۲	From: 📰				From:		From:		•	
				То: 📰				To :		To :			
	400000001	Website 2 Store 2 English		Jul 2, 2013 3:03:34 PM	Test customer last na	ime 1	est customer last name		\$2,704.99		\$2,704.99	Pending	<u>View</u>
	100000001	Main Website Main Store English		Jun 22, 2013 4:13:12 PM	Shalabh Aggarwal	s	Shalabh Aggarwal		\$2,255.00		\$2,255.00	Canceled	<u>View</u>
		ealthy - Report Al Bugs h (United States) / English V			Magente	ver. 1.7.0.2					ento™ is a tra	i <u>he Magento C</u> Idemark of Ma jht © 2013 Ma	gento Inc

4.4 Handle Taxes When Importing Orders From Magento

Taxes are matched on openerp and magento using their rates. But there can be multiple taxes with same rates and hence lead to ambiguity. So a field is added to taxes in openerp which allows the user to tell the system that a tax can be used for rate matching with a tax on magento.

	Messaging Sales Accounting	Purchases Warehouse	Magento Manufacturing Reporting Settings					🛥 🔺 🦳
	<i>Оре</i> й ERP	Taxes / ST11 Edit Create			More -			3/13 🔶
	Customers Customer Invoices Customer Refunds Sales Receipts Customer Payments Customers Suppliers	Tax Name Tax Code	Standard rate sales (20%) ST11 Special Computation			Tax Application Si Active	ale B	
	Suppler Invitors Suppler Invitors Suppler Invitors Tax Computation Parkase Recipits Suppler Invitors Suppler Invitors Suppler Invitors Suppler Invitor Suppler Suppler Invitor Suppler Suppler Suppler Supple	Tax Included in Price	Percentage 0.2000		S T F F F F		20000 Sales Tax Control Account 4	
	Charts Ch	Tax Code Sign Children/Sub T Tax on Children Sequence	1.00	Tax		Tax Code Sign	1 to the address of the company	Tax Code
See screenshot below:	Reporting Legal Reports Generic Reporting Configuration Periods Difference Legals	Magento Is this tax used on mag Is this tax applied on m	(

The corresponding tax on magento can be seen in screenshot below:

Edit Rule		Back Reset O Delete Rule O Save Rule O Save and Continue E
ax Rule Information		
Name *	Retail Customer-Taxable Goods-Rate 1	
Customer Tax Class *	Retail Customer	
Product Tax Class *	Taxable Goods Shipping	
	VAT Standard VAT Marginal	
	VAT Zero	
Tax Rate *	US-CA-*-Rate 1 US-NY-*-Rate 1	
	VAT Standard VAT Marginal	
	VAT Zero	

Now, when an order placed on magento with 'Magento Tax' is imported to openerp, the 'OpenERP Tax' will be applied on the corresponding sale line in openerp. If no matching tax is found, then no tax is applied and a user can apply taxes if needed, later.

Note: This feature works only for simple products as of now.

4.5 Handle Taxes On Shipping

Handling of taxes on shipping need an extra bit of configuration to be done. Tax on shipping has to be set as tax included in price because magento does not send the tax on shipping as a rate and calculating the rate from the amount almost always leads to mismatch of order totals due to rounding issues. Hence, the tax on shipping is set to be included in price to make sure order totals match and tax calculation done by openerp is assumed to be as close as possible to the tax calculation done by magento. See screenshot below:

Customer Invoices					
Customer Refunds		n magento Shipping	Tax Application	All	
Sales Receipts	Tax Code		Active		
Customer Payments					
Customers	Tax Definition Special	Computation			
Suppliers		computation			
Supplier Invoices	Tax Computation		Misc		
Supplier Refunds	Tax Computation		MISC		
Purchase Receipts	Tax Type Percen		Sequence	1	
Supplier Payments	0.2000	00	Included in base amo	ount	
Suppliers	Tax Included in Price 🧹		Tax on Children		
Bank and Cash					
Bank Statements	Invoices		Refunds		
Cash Registers	Invoice Tax Account		Refund Tax Account		
Journal Entries	Invoice Tax Analytic Account		Refund Tax Analytic A	Account	
Journal Items	Account Base Code		Refund Base Code		
Journal Entries	Base Code Sign	1.00	Base Code Sign	1.00	
Journal Vouchers	Account Tax Code		Refund Tax Code		
Analytic Journal Items	Tax Code Sign	1.00	Tax Code Sign	1.00	
Charts					
Chart of Accounts	Children/Sub Taxes	5			
Chart of Analytic Accounts	Tax on Children				
Chart of Taxes	Sequence	Tax Name	Tax Included in Price	Tax Code	
Payment Follow-up	Sequence	I dx Ndme	Tax included in Price	Tax Code	
Reconcile Invoices & Pay					
Send Letters and Emails					
Do Manual Follow-Ups					
Periodic Processing					
Draft Entries					
Reconciliation	Magento				
Recurring Entries	Is this tax used on magento ?	\checkmark			
End of Period	Is this tax applied on magent	o shipping ? 🧹			
Reporting					
Legal Reports					

Here details need to be set as highlighted in screenshot.

Note: Make sure that only one tax has been set to be applied on magento shipping.

About Openlabs Technologies and Consulting Private Limited

Openlabs Technologies and Consulting Private Limited is a global Information Technology and Management Consulting Company that helps small and medium businesses achieve high efficiency with cost effective business solutions. With customers and partners in four continents, Openlabs designs and delivers technology enabled innovative business solutions that addresses the needs of small and medium enterprises. Openlabs provides end to end solutions to businessess using a range of Free and Opensource Solutions (FOSS) Implemented by a team of highly skilled workforce comprising of domain and business experts.

The software division of Openlabs is a specialised division of Rapid Application Development of business application with a proven expertise in OpenERP (and OpenObject). Tryton and Django.

5.1 Technical Support

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CHAPTER 6

Indices and tables

- genindex
- modindex
- search