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# **Magento OpenERP Integration Documentation**

***Release 1.0***

**Openlabs Technologies & Consulting (P) Limited**

February 06, 2016



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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.

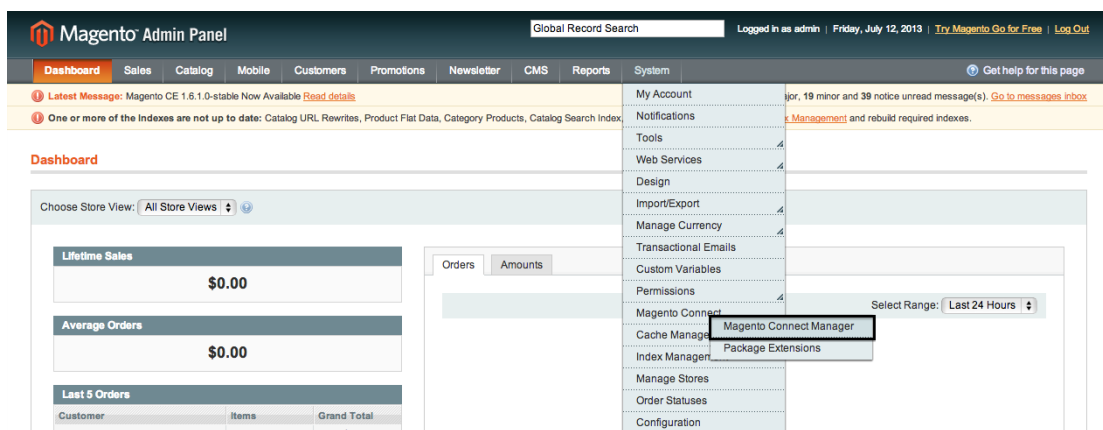
See [Installation](#) first, then to login to the ERP, see [Login Instructions](#).

## 1.1 Installation

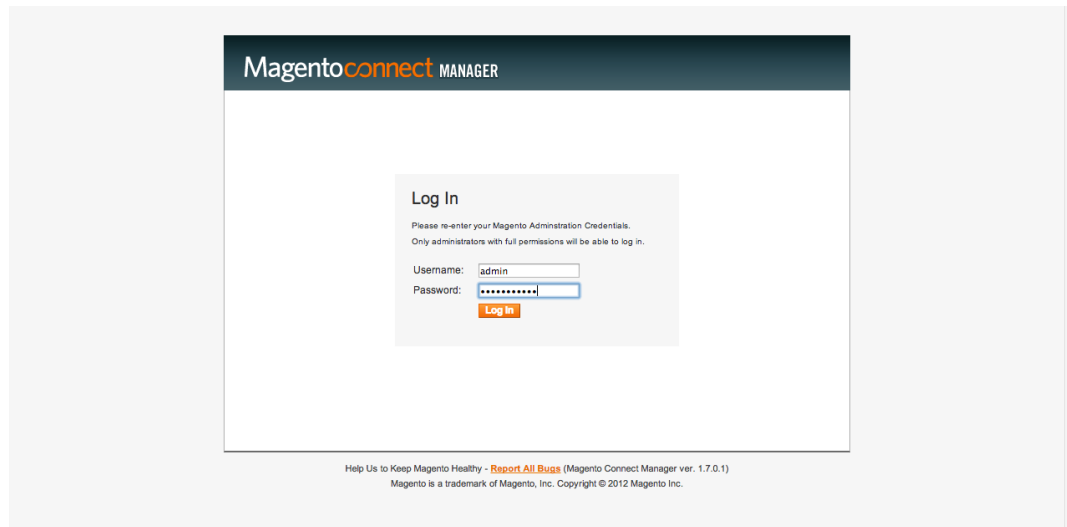
### Step 1: Installation of Magento core API extension

1. After login to magento Admin Panel, go to

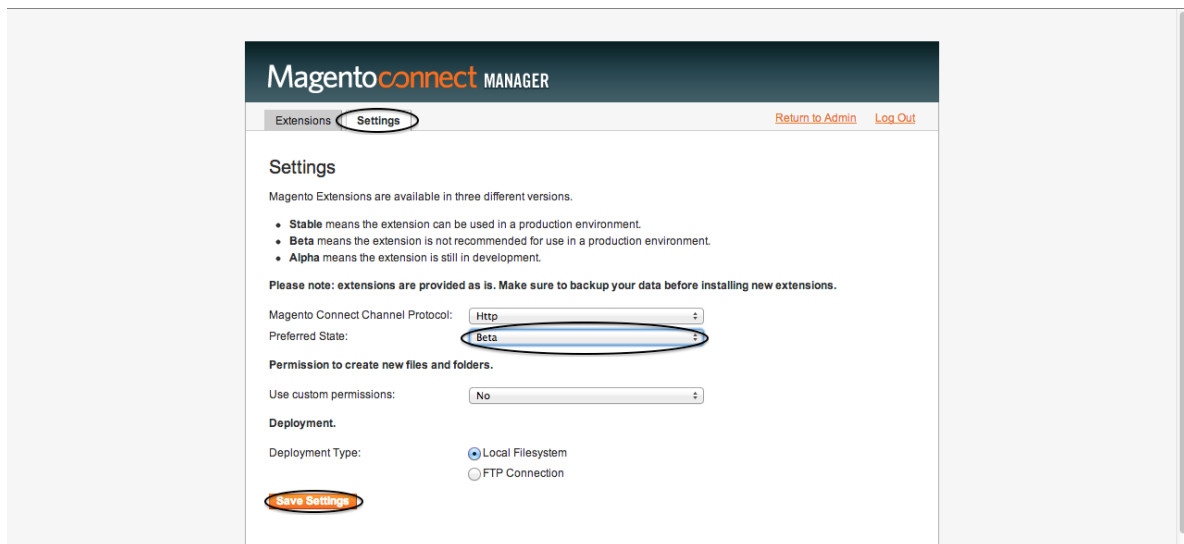
System >> Magento Connect >> Magento Connect Manager



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



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

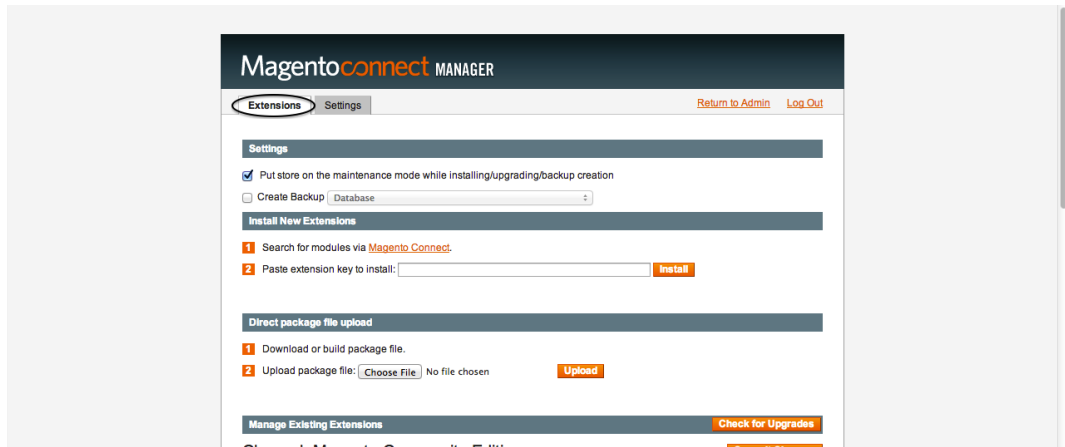


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**Note:** Default state is *Stable*, change it to *Beta*.

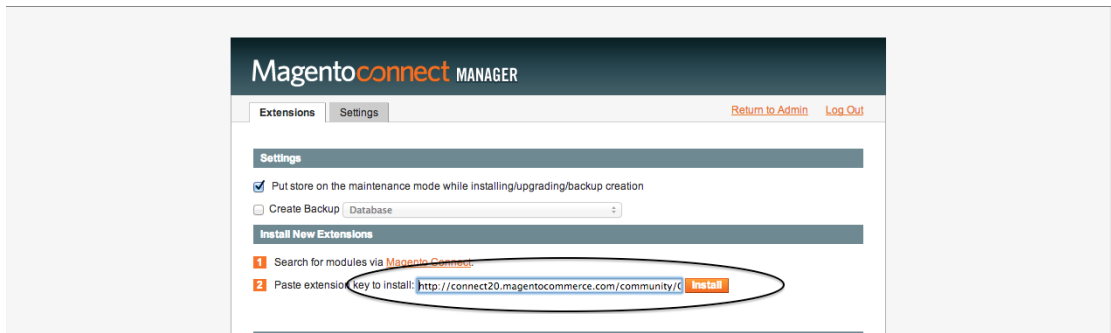
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4. Go to first tab i.e., *Extensions* to install magento-connector,

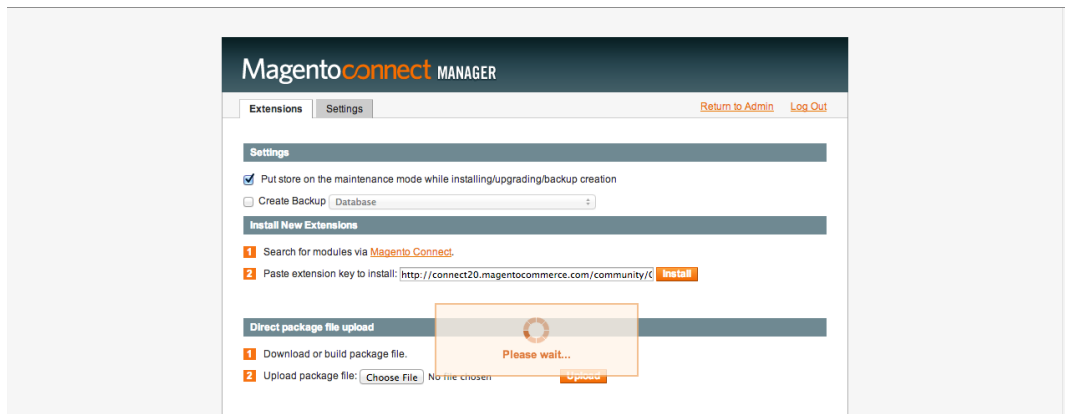


5. You need to paste the following extension key in the box to install:

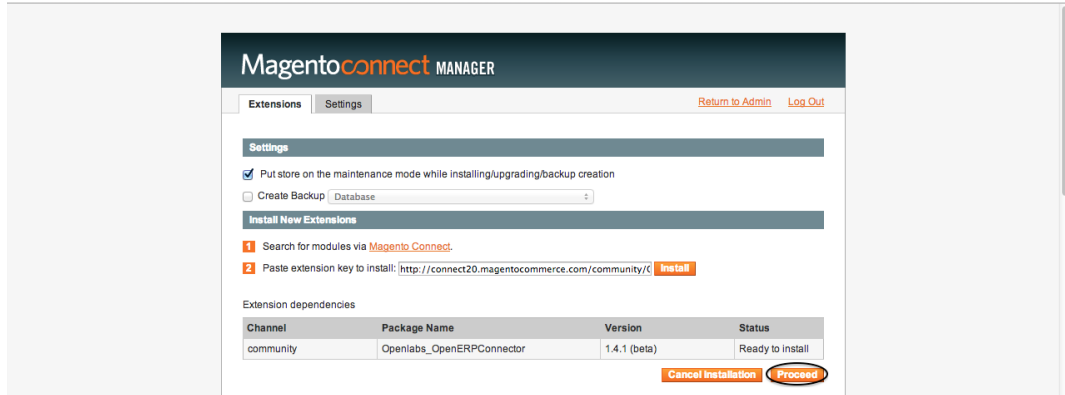
[http://connect20.magentocommerce.com/community/Openlabs\\_OpenERPConnector](http://connect20.magentocommerce.com/community/Openlabs_OpenERPConnector)



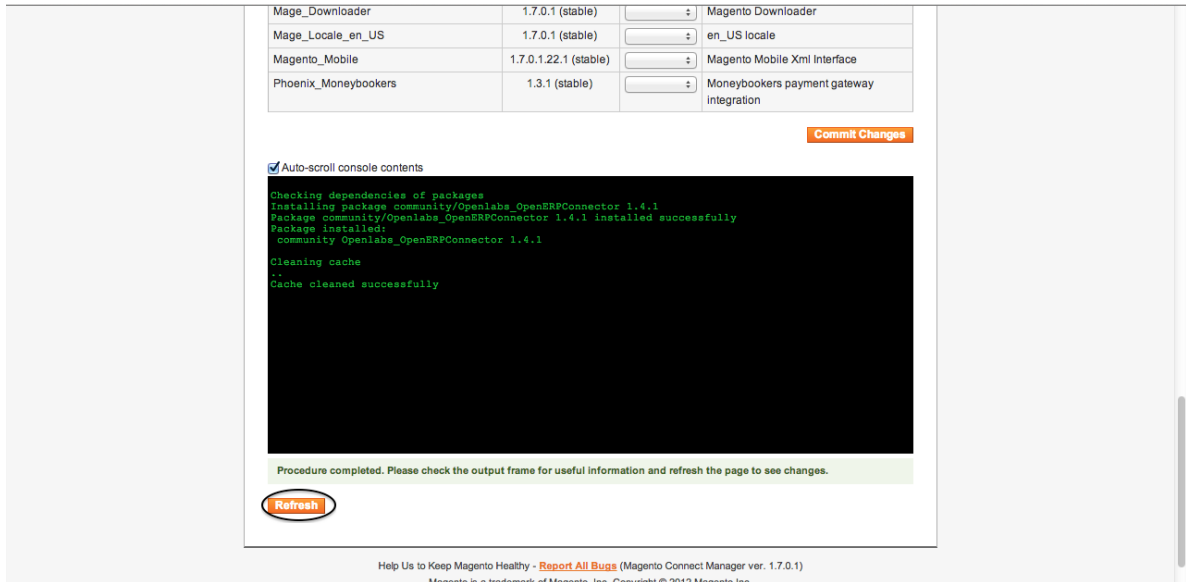
6. Click Install, and wait for the module to be shown for installation



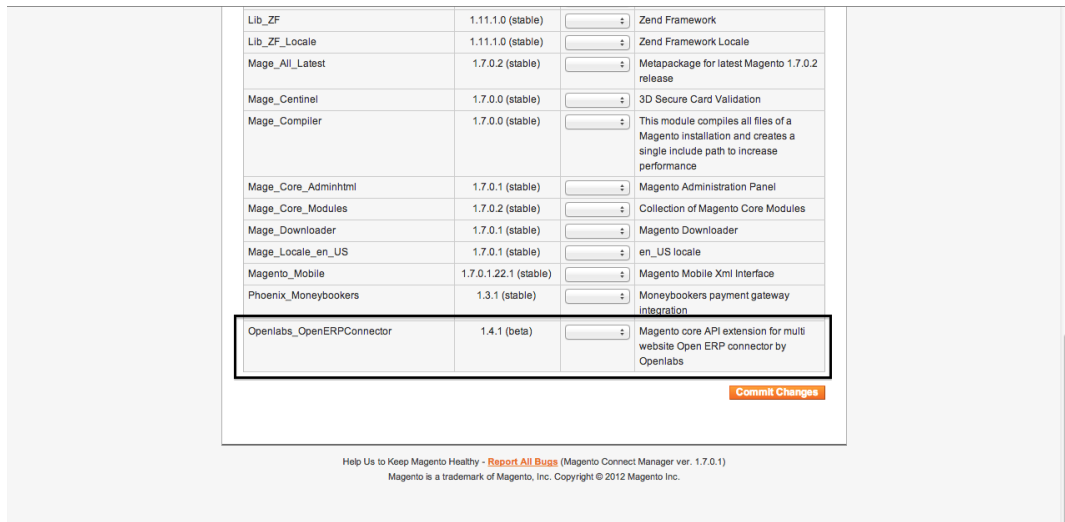
7. Install it by clicking Proceed, refer below screenshot:



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



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:



## 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\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

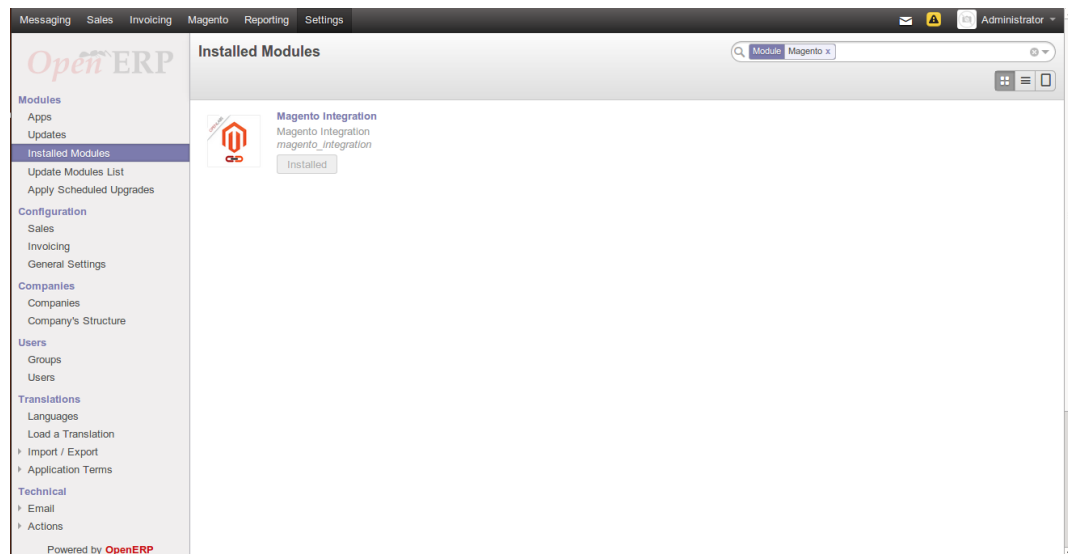
### 1.1.1 Login to OpenERP

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

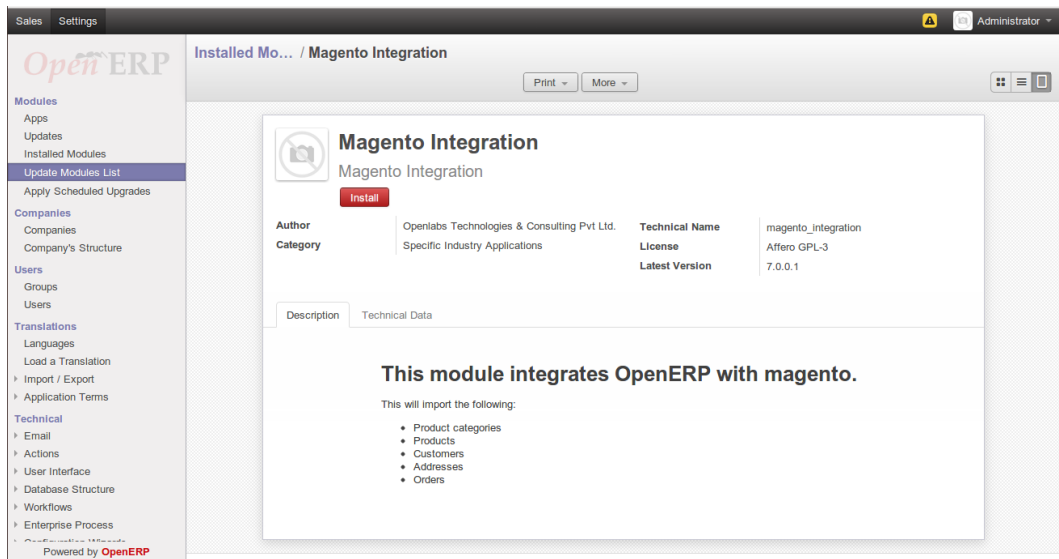
- Username: Ask your administrator for this information
- Password: Ask your administrator for this information



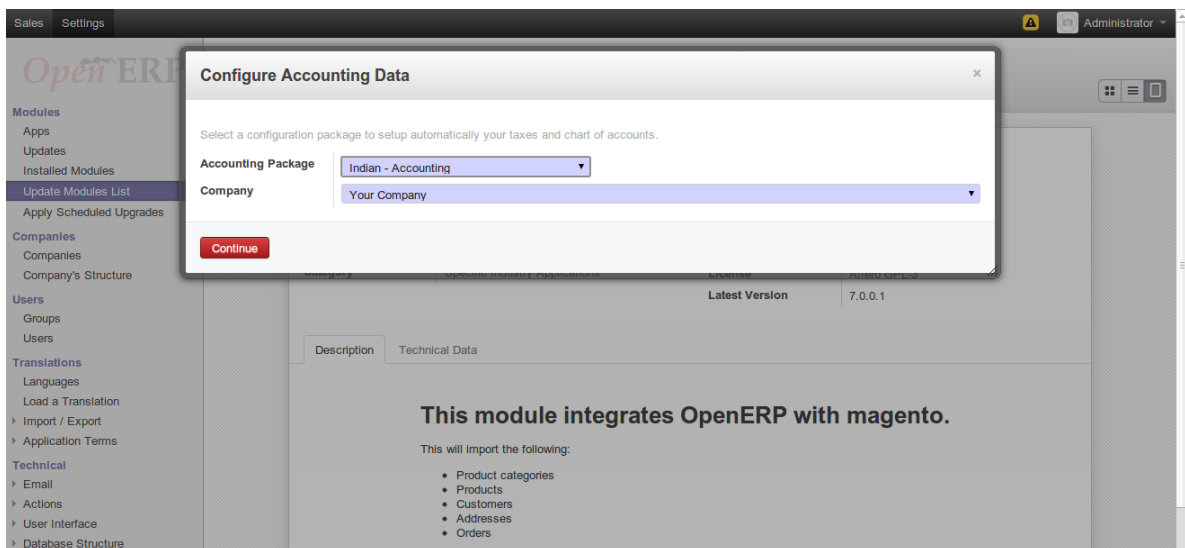
1. Go to Settings, click on *Update Modules List* shown under **Modules**
2. Search for magento module in the search bar at top-right side of the page.
3. Search returns the module named *Magento Integration*, now click on the module to install, refer below screenshot:



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



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.



6. Now magento is installed. To configure it, refer [Configuration](#).



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## Configuration

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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`

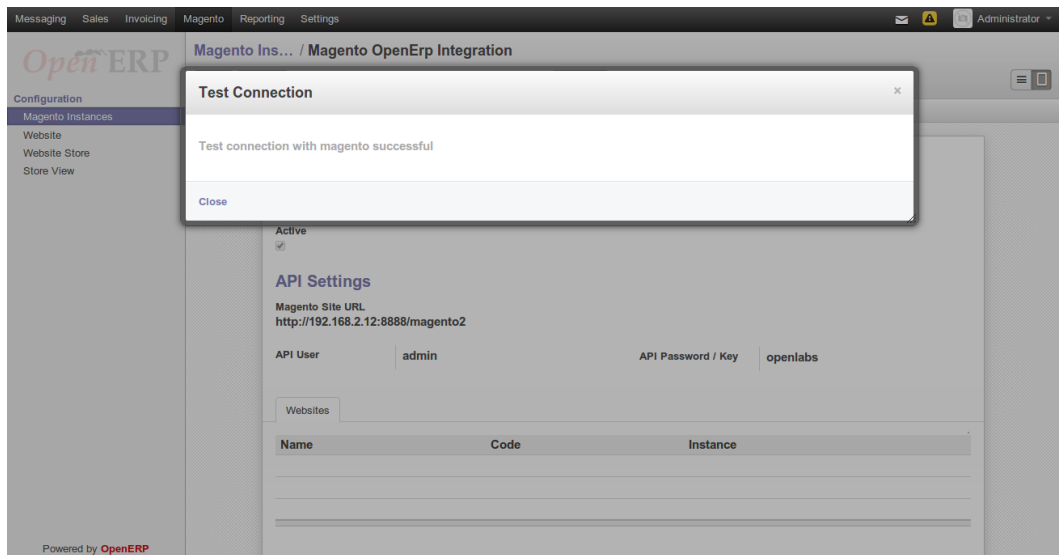
1. Create a new `magento instance` by clicking create.

The screenshot shows the OpenERP configuration interface. The top navigation bar includes 'Messaging', 'Sales', 'Invoicing', 'Magento', 'Reporting', and 'Settings'. The 'Magento' tab is selected, and the 'Configuration' section is active. The left sidebar shows 'Configuration' > 'Magento Instances' > 'Website' > 'Website Store' > 'Store View'. The main content area is titled 'Magento Ins... / New' and contains a 'Save' button and a 'Discard' button. Below these are 'Test Connection' and 'Import Websites' buttons. The form fields are as follows:

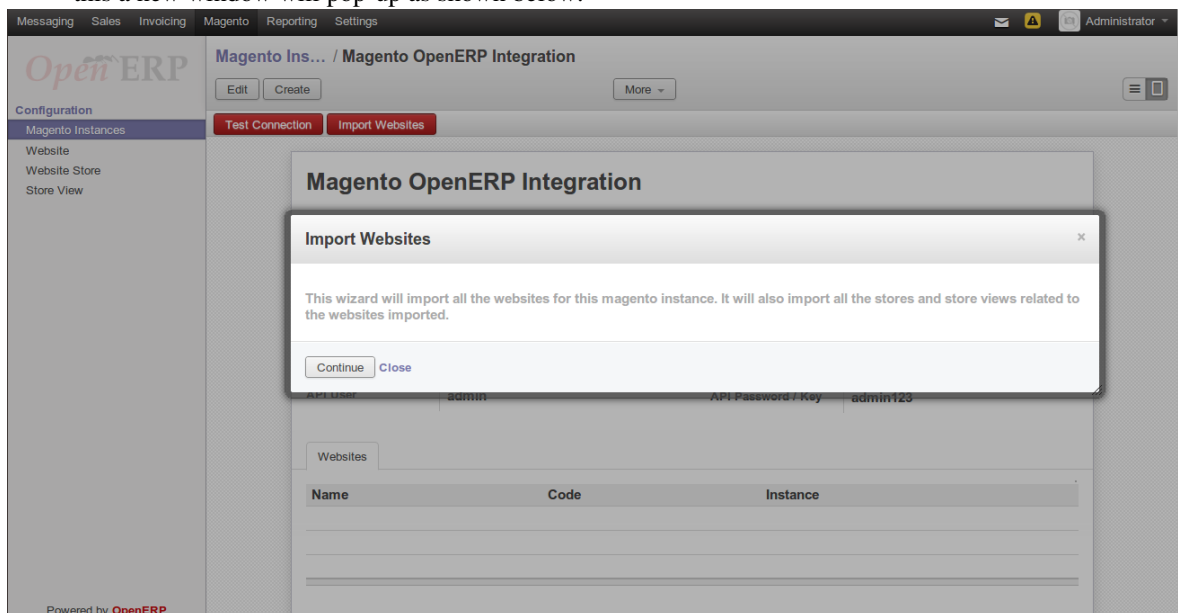
- Name:** 'Magento OpenERP Integration'
- Company:** 'Your Company' (dropdown menu)
- Active:** ☒
- API Settings:**
  - Magento Site URL:** 'http://192.168.2.12:8888/magento2'
  - API User:** 'admin'
  - API Password / Key:** 'openlabs'
- Websites:** A table with columns 'Name', 'Code', and 'Instance'.

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:



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:



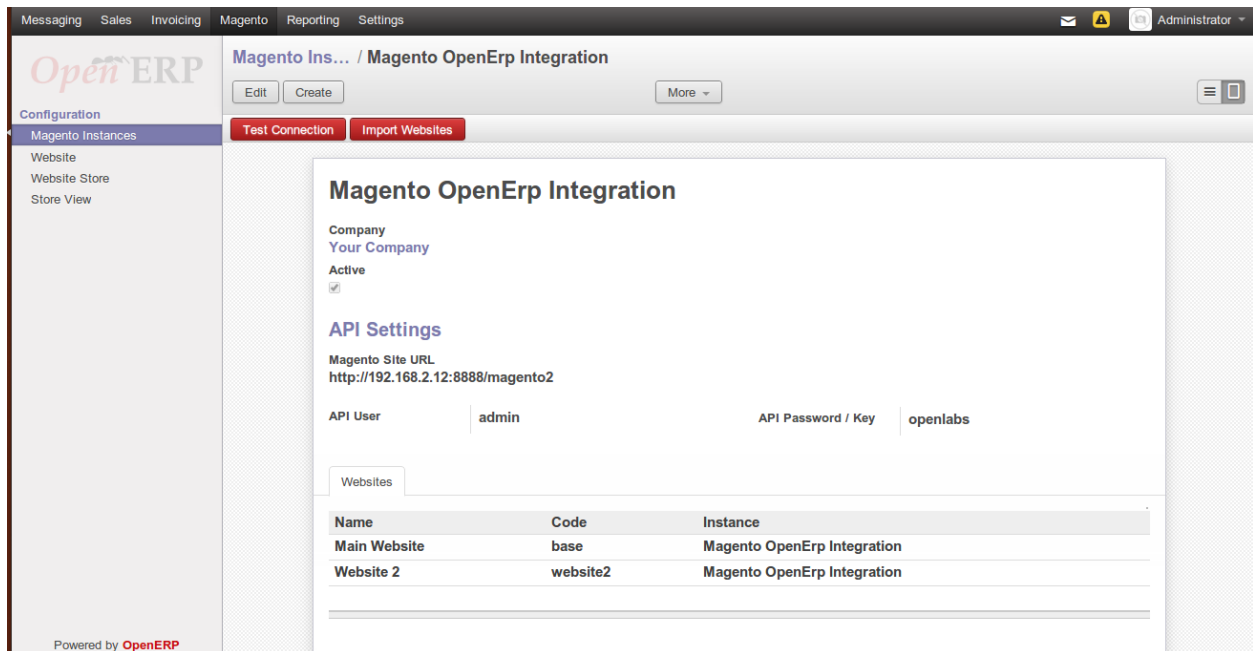
To know more about *Magento Website*, refer [website](#).

## 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:

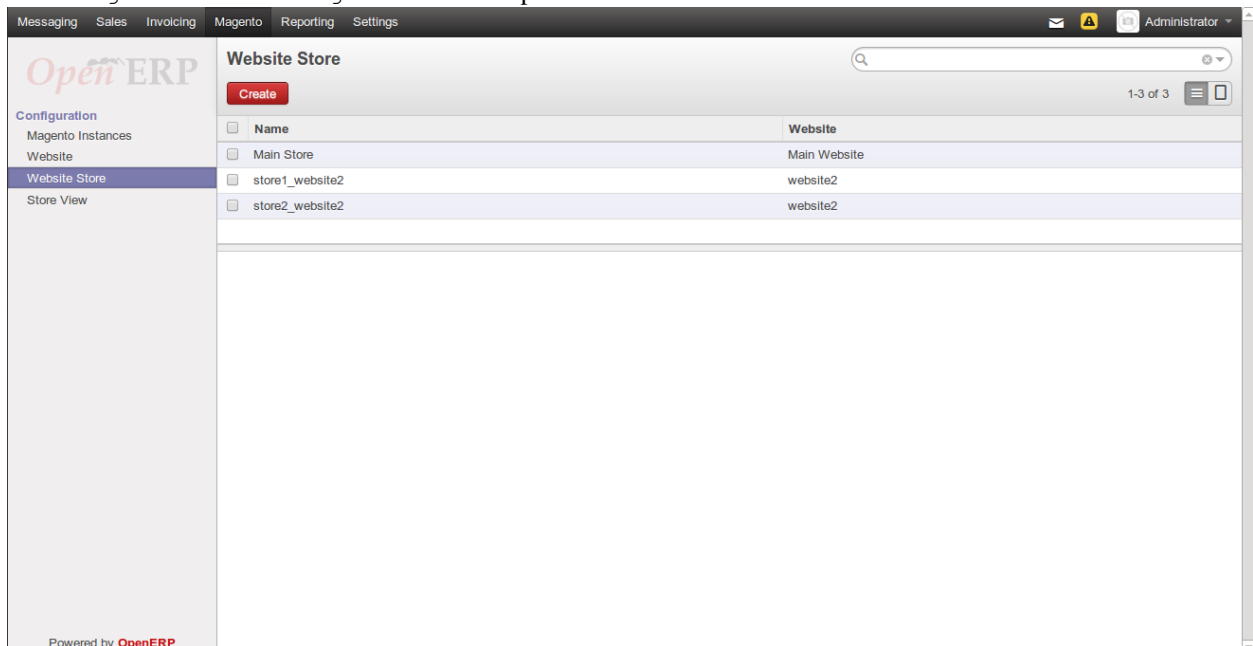


**Note:** A website must be unique in an magento instance

## 2.3 Website Store

Magento Website Store or Store view groups

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

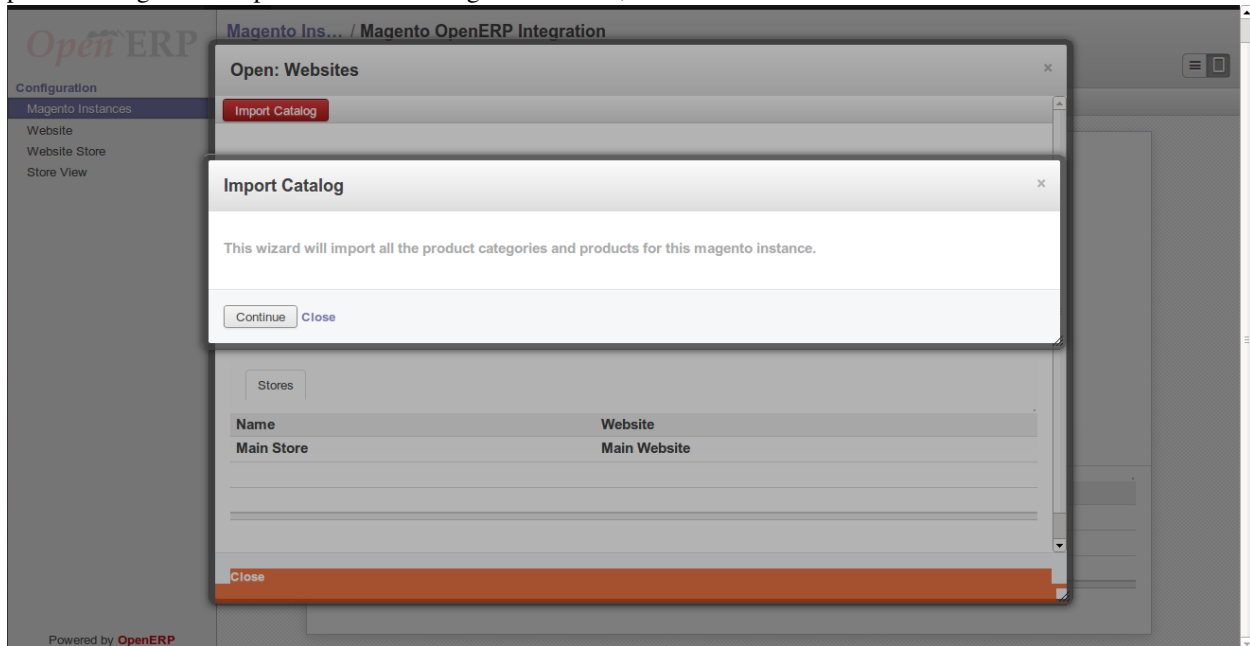


Stores are children of websites. The visibility of products and categories is managed on magento at store level by specifying the root category on a store. The setup for root catalog on stores does not reflect on OpenERP as there is

no functional benefit of doing so.

**Note:** A store must be unique in a website

Double click on any of 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:



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

The screenshot shows the 'Magento Instance Products' table with columns: Internal Reference, Name, Quantity On Hand, Quantity Available, Public Price, and Status. The table contains 18 rows of product data. The 'Powered by OpenERP' logo is visible in the bottom left corner.

Internal Reference	Name	Quantity On Hand	Quantity Available	Public Price	Status
1111	Ottoman	0.00	0.00	299.99	
1112	Chair	0.00	0.00	129.99	
1113	Couch	0.00	0.00	599.99	
1114	Magento Red Furniture Set	0.00	0.00	0.00	
1gbdim	Crucial 1GB PC4200 DDR2 533MHz Memory	0.00	0.00	150.99	
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	
2gbdim	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	250.00	
384822	Akio Dresser	0.00	0.00	399.99	
3yr_p_l	Three Year Extended Warranty - Parts and Labor	0.00	0.00	325.00	
4fasd5f5	The Get Up Kids: Band Camp Pullover Hoodie	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	
512dim	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	
8525PDA	AT&T 8525 PDA	0.00	0.00	199.99	

**Note:** Each product in a website must be unique!

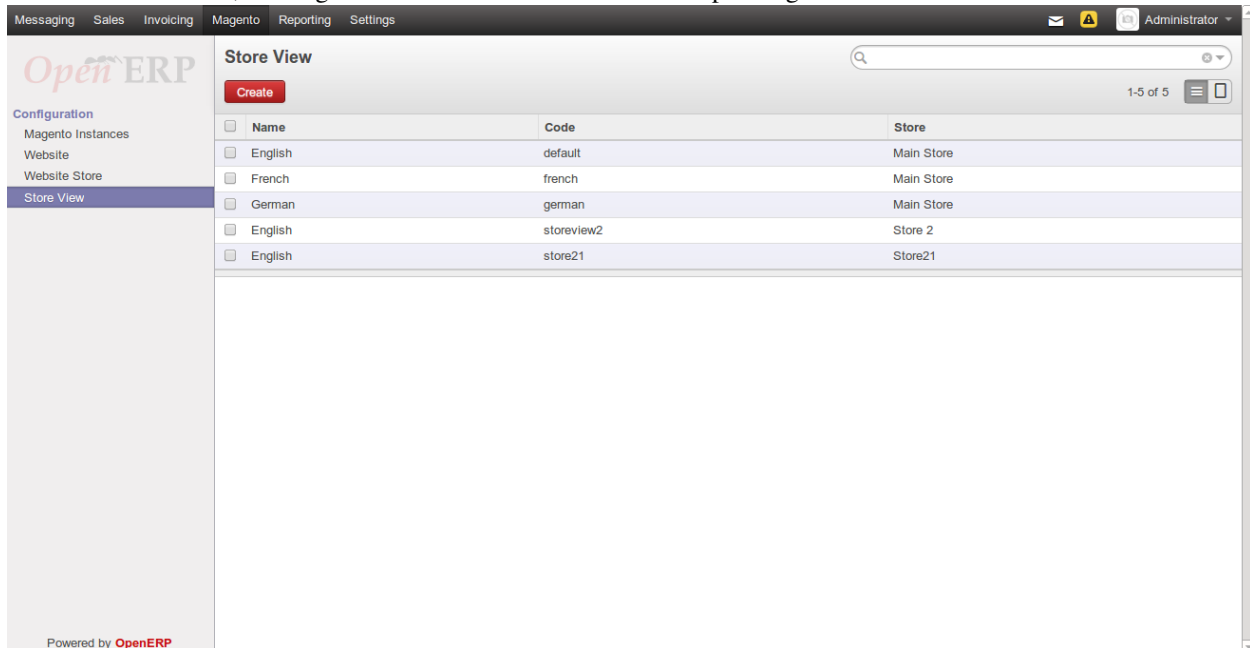
## 2.4 Store View

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



The screenshot displays the 'Store View' configuration page in the Magento OpenERP interface. The page features a sidebar with navigation links: Configuration, Magento Instances, Website, Website Store, and Store View (which is currently selected). The main content area is titled 'Store View' and includes a 'Create' button. Below the button is a table with the following data:

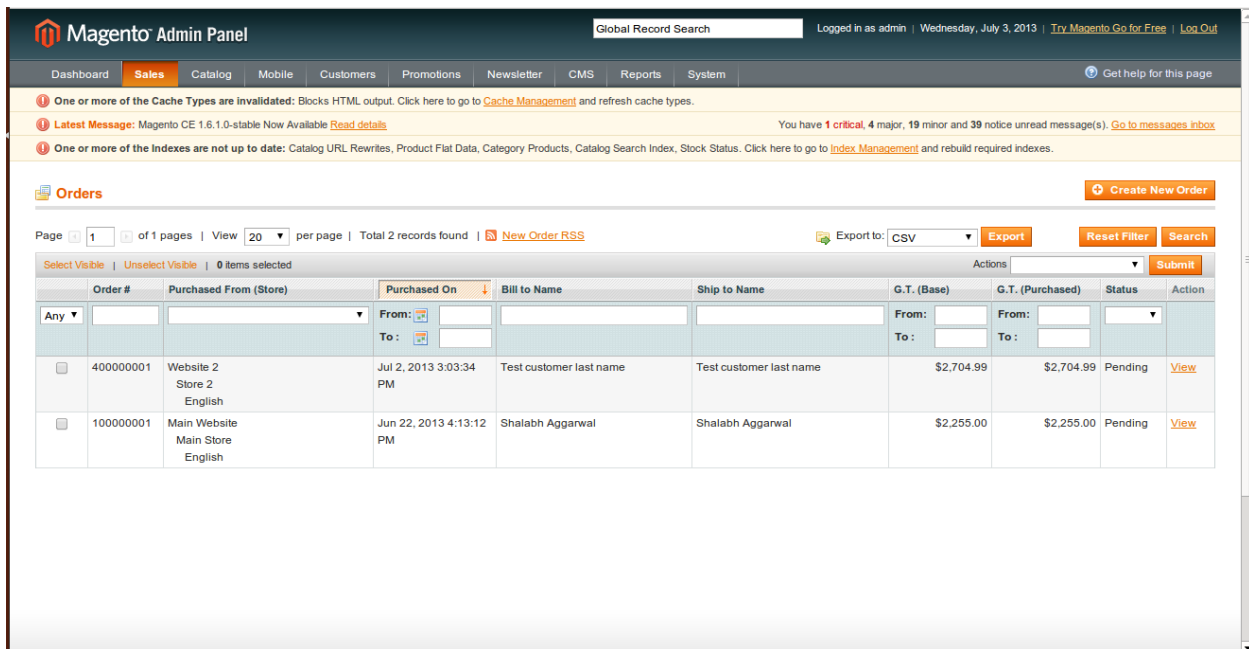
<input type="checkbox"/>	Name	Code	Store
<input type="checkbox"/>	English	default	Main Store
<input type="checkbox"/>	French	french	Main Store
<input type="checkbox"/>	German	german	Main Store
<input type="checkbox"/>	English	storeview2	Store 2
<input type="checkbox"/>	English	store21	Store21

The footer of the page indicates it is 'Powered by OpenERP'.



## Create Sale Orders in Magento

Sales orders in Magento can be created from the Magento Admin Panel with the **Create New** button shown in the below *Create New Order* screenshot. **Sale in Magento**



The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with tabs for Dashboard, Sales, Catalog, Mobile, Customers, Promotions, Newsletter, CMS, Reports, and System. Below the navigation bar, there are several status messages: "One or more of the Cache Types are invalidated", "Latest Message: Magento CE 1.6.1.0-stable Now Available", and "One or more of the Indexes are not up to date". The main section is titled "Orders" and includes a "Create New Order" button. Below this, there's a table of orders with the following columns: Order #, Purchased From (Store), Purchased On, Bill to Name, Ship to Name, G.T. (Base), G.T. (Purchased), Status, and Action. Two orders are listed:

Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Action
400000001	Website 2 Store 2 English	Jul 2, 2013 3:03:34 PM	Test customer last name	Test customer last name	\$2,704.99	\$2,704.99	Pending	<a href="#">View</a>
100000001	Main Website Main Store English	Jun 22, 2013 4:13:12 PM	Shalabh Aggarwal	Shalabh Aggarwal	\$2,255.00	\$2,255.00	Pending	<a href="#">View</a>

### Orders in Magento

Global Record Search

Logged in as admin

Wednesday, July 3, 2013

[Try Magento Go for Free](#)
[Log Out](#)

Dashboard

Sales

Catalog

Mobile

Customers

Promotions

Newsletter

CMS

Reports

System

Get help for this page

One or more of the Cache Types are invalidated: Blocks HTML output. Click here to go to [Cache Management](#) and refresh cache types.

Latest Message:

Magento CE 1.6.1.0-stable Now Available

[Read details](#)

You have 1 critical, 4 major, 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 Flat Data, Category Products, Catalog Search Index, Stock Status. Click here to go to [Index Management](#) and rebuild required indexes.

Order View

Order # 100000001 | Jun 22, 2013 4:13:12 PM

Back

Edit

Cancel

Send Email

Hold

Invoice

Ship

Information

Invoices

Credit Memos

Shipments

Comments History

Transactions

Order # 100000001 (the order confirmation email was sent)

Order Date

Jun 22, 2013 4:13:12 PM

Order Status

Pending

Purchased From

Main Website  
Main Store  
English

Placed from IP

127.0.0.1

Account Information

Customer Name

Shalabh Aggarwal

Email

[sa@openlabs.co.in](mailto:sa@openlabs.co.in)

Customer Group

NOT LOGGED IN

Billing Address

Edit

Shalabh Aggarwal

street 1

street 2

test city, Delhi, 123456

India

T: 2134567890

Shipping Address

Edit

Shalabh Aggarwal

street 1

street 2

test city, Delhi, 123456

India

T: 2134567890

Payment Information

Check / Money order

Order was placed using USD

Shipping & Handling Information

Flat Rate - Fixed \$5.00

Order # 100000001 | Jun 22, 2013 4:13:12 PM

Back

Edit

Cancel

Send Email

Hold

Invoice

Ship

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
A test monitor SKU: 226bw Manufacturer Samsung	Ordered	\$2,250.00	\$2,250.00	Ordered 1	\$2,250.00	\$0.00	0%	\$0.00	\$2,250.00

Comments History

Add Order Comments

Status

Pending ▼

Comment

☐ Notify Customer by Email
 ☐ Visible on Frontend

Submit Comment

Jun 22, 2013 4:13:12 PM | Pending

Customer Notified ✓

Order Totals

Subtotal	\$2,250.00
Shipping & Handling	\$5.00
<b>Grand Total</b>	<b>\$2,255.00</b>
<b>Total Paid</b>	<b>\$0.00</b>
<b>Total Refunded</b>	<b>\$0.00</b>
<b>Total Due</b>	<b>\$2,255.00</b>

Help Us Keep Magento Healthy - Report All Bugs

Interface Locale: English (United States) / English ▼

Magento ver. 1.7.0.2

Connect with the Magento Community

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Profiler

Memory usage: real: 26214400, emalloc: 25871984

Code Profiler

Time

Cnt

Emalloc

RealMem

18

Chapter 3. Create Sale Orders in Magento

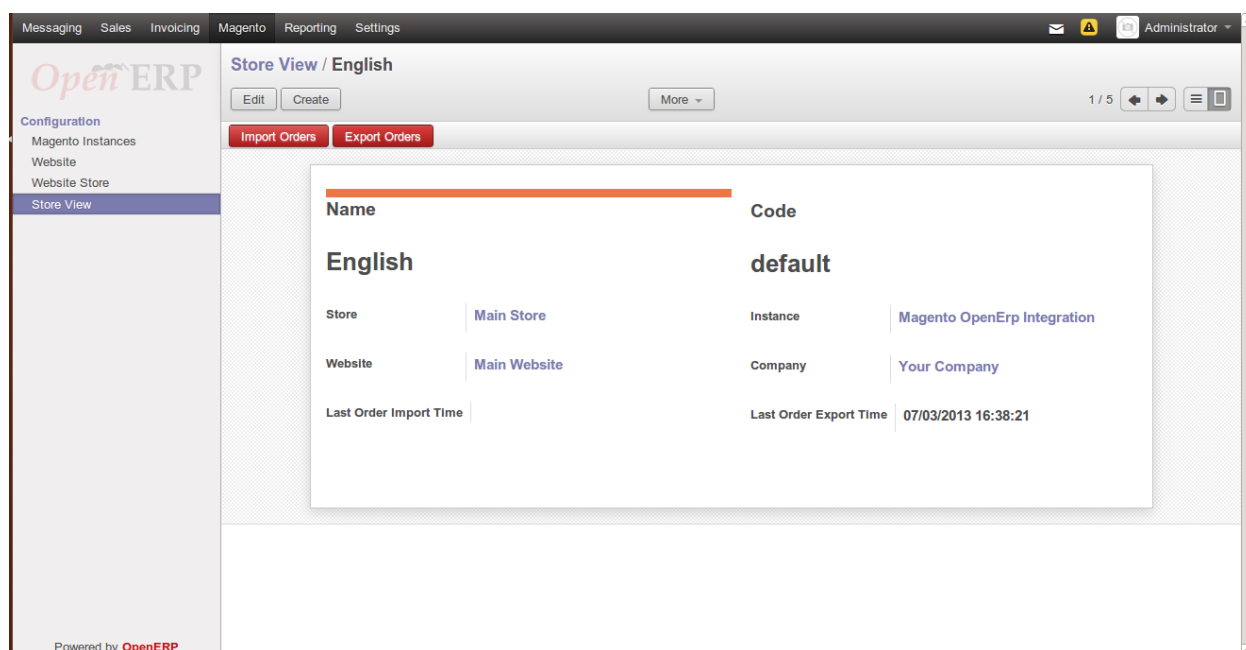
## How it Works

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

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

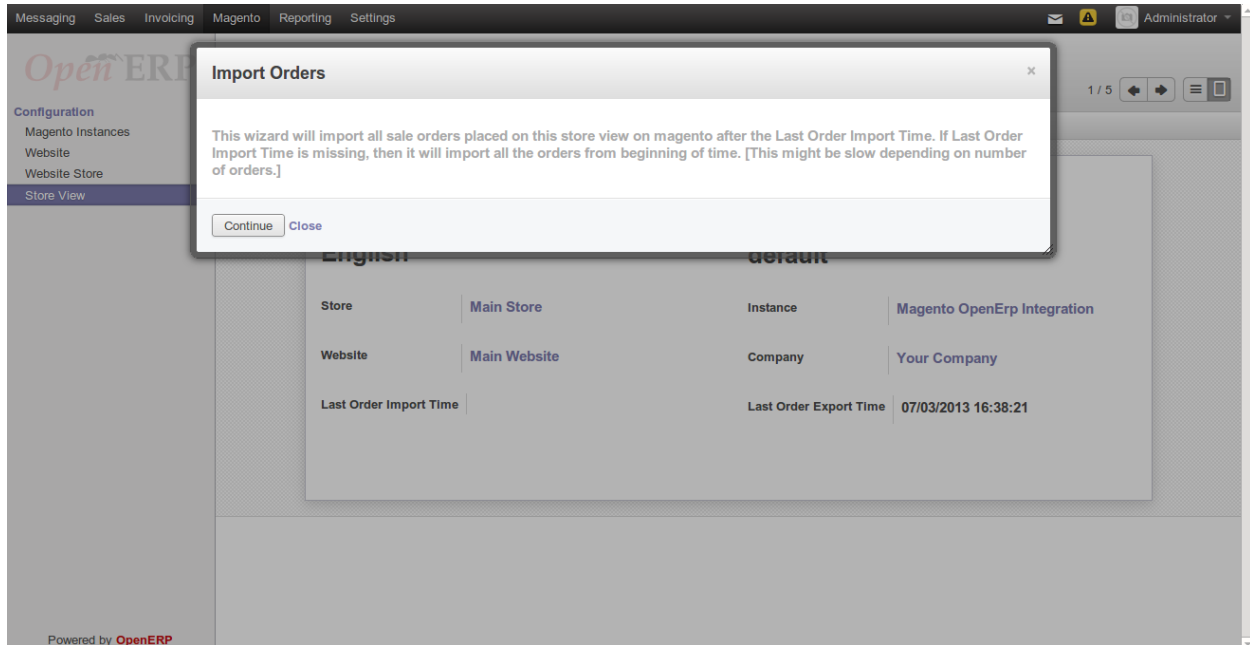


An order in Magento has a number of entities related and they are imported in OpenERP as described below:

- 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:



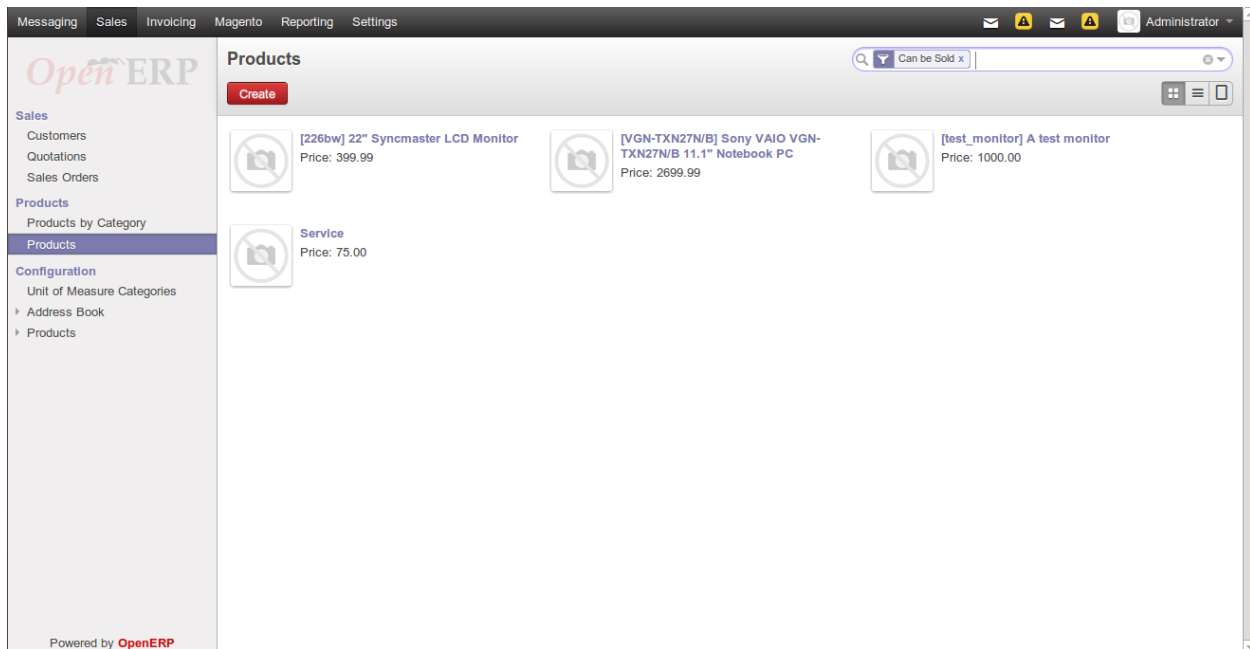
### Order imported as Sales in OpenERP

Sales >> Sales Orders

The screenshot displays the OpenERP Sales Orders interface. The top navigation bar includes 'Messaging', 'Sales' (highlighted), 'Invoicing', 'Magento', 'Reporting', and 'Settings'. The left sidebar shows a menu with 'Sales' (Customers, Quotations, Sales Orders), 'Products' (Products by Category, Products), and 'Configuration' (Unit of Measure Categories, Address Book, Products). The main content area is titled 'Sales Orders / mag\_100000001' and features buttons for 'Edit', 'Create', 'Print', and 'More'. Below this, there are buttons for 'Create Invoice' and 'Cancel Order', and a progress bar showing 'Draft Quotation' > 'Quotation Sent' > 'Sale to Invoice' > 'Done'. The central panel displays the 'Sales Order mag\_100000001' details, including customer information (Shalabh Aggarwal, street 1, street 2, test city 123456, Delhi, India), date (06/22/2013), shop (Your Company), and customer reference. Below this, there are tabs for 'Order Lines' and 'Other Information'. The 'Order Lines' tab shows a table with columns: Product, Description, Quantity, Taxes, Unit Price, and Subtotal. The table contains three rows: '[test\_monitor] A test monitor' (Quantity: 1.000, Unit Price: 2250.00, Subtotal: 2250.00), '[226bw] 22" Syncmaster LCD Monitor' (Quantity: 1.000, Unit Price: 0.00, Subtotal: 0.00), and 'Magento Shipping' (Quantity: 1.000, Unit Price: 5.00, Subtotal: 5.00). To the right of the table, there is a summary section showing 'Untaxed Amount : 2255.00 €', 'Taxes : 0.00 €', and 'Total : 2255.00 €'. At the bottom, there is a 'Send a message or Log a note' section with two entries: 'Quotation confirmed' (Status: Draft Quotation → Sale to Invoice, Untaxed Amount: 2255.0) and 'Document created' (Administrator updated document about a minute ago). On the right, there is a 'Following' section with checkboxes for 'Discussions', 'Quotation sent', and 'Sales Order Confirmed', and a list of 2 followers: 'Administrator' and 'Shalabh Aggarwal'.

**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.

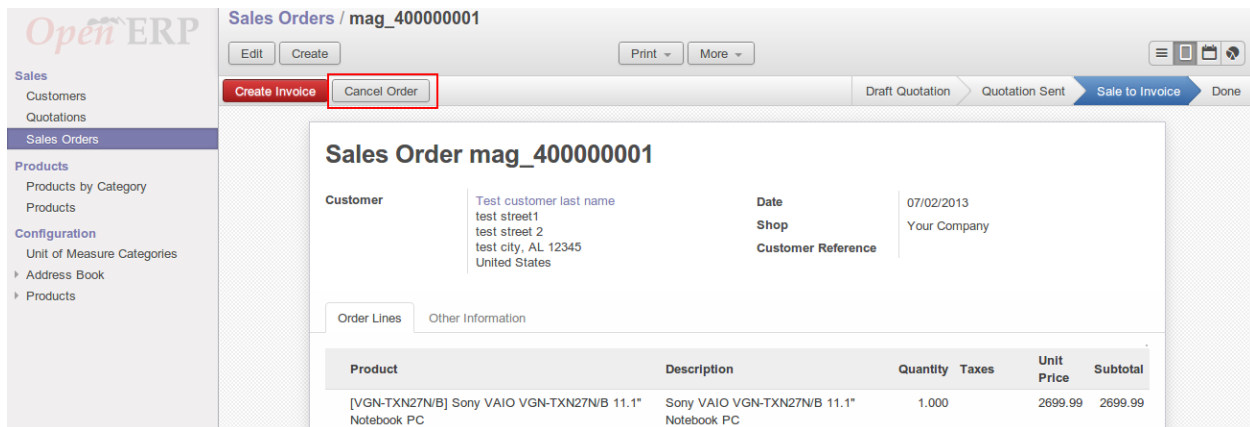
## Product in OpenERP



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:



Now state has been changed to cancelled, see below

### Cancelled Sale Order

**Sales Orders / mag\_400000001**

Buttons: Edit, Create, Print, More

Workflow: New Copy of Quotation, Draft Quotation, Quotation Sent, **Cancelled**, Done

**Sales Order mag\_400000001**

**Customer**  
 Test customer last name  
 test street1  
 test street 2  
 test city, AL 12345  
 United States

**Date**: 07/02/2013  
**Shop**: Your Company  
**Customer Reference**

Order Lines | Other Information

Product	Description	Quantity	Taxes	Unit Price	Subtotal
[VGN-TXN27N/B] Sony VAIO VGN-TXN27N/B 11.1" Notebook PC	Sony VAIO VGN-TXN27N/B 11.1" Notebook PC	1.000		2699.99	2699.99
	Magento Shipping	1.000		5.00	5.00
Untaxed Amount :					2704.99 €
Taxes :					0.00 €
<b>Total :</b>					<b>2704.99 €</b>

Powered by OpenERP

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.

**Export Orders**

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.]

Buttons: Continue, Close

English	default
<b>Store</b> : Main Store	<b>Instance</b> : Magento OpenErp Integration
<b>Website</b> : Main Website	<b>Company</b> : Your Company
<b>Last Order Import Time</b> : 07/03/2013 16:50:09	<b>Last Order Export Time</b> : 07/03/2013 16:38:21

Powered by OpenERP

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

Global Record Search

Logged in as admin

Wednesday, July 3, 2013

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[Log Out](#)

Dashboard

Sales

Catalog

Mobile

Customers

Promotions

Newsletter

CMS

Reports

System

Get help for this page

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Latest Message:

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One or more of the Indexes are not up to date: Catalog URL Rewrites, Product Flat Data, Category Products, Catalog Search Index, Stock Status. Click here to go to [Index Management](#) and rebuild required indexes.

Orders

Create New Order

Page 1 of 1 pages | View 20 per page | Total 2 records found | [New Order RSS](#)

Export to: CSV

Export

Reset Filter

Search

Select Visible | Unselect Visible | 0 items selected

Actions

Submit

	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Action
Any			From: To:			From: To:	From: To:		
<input type="checkbox"/>	400000001	Website 2 Store 2 English	Jul 2, 2013 3:03:34 PM	Test customer last name	Test customer last name	\$2,704.99	\$2,704.99	Pending	<a href="#">View</a>
<input type="checkbox"/>	100000001	Main Website Main Store English	Jun 22, 2013 4:13:12 PM	Shalabh Aggarwal	Shalabh Aggarwal	\$2,255.00	\$2,255.00	Canceled	<a href="#">View</a>

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Interface Locale: English (United States) / English

Magento ver. 1.7.0.2

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[Profiler]

Memory usage: real: 17825792, emalloc: 17558048

Code ProfilerTimeCntrlEmallocRealMem

**Note:** This feature is currently available for Cancelled Orders

## 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.

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Chapter 4. How it Works

See screenshot below:

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

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

Sales Receipts

Customer Payments

Customers

Suppliers

Supplier Invoices

Supplier Refunds

Purchase Receipts

Supplier Payments

Suppliers

Bank and Cash

Bank Statements

Cash Registers

Journal Entries

Journal Items

Journal Entries

Journal Vouchers

Analytic Journal Items

Charts

Chart of Accounts

Chart of Analytic Accounts

Chart of Taxes

Payment Follow-up

Reconcile Invoices & Pay...

Send Letters and Emails

Do Manual Follow-Ups

Periodic Processing

▸ Draft Entries

▸ Reconciliation

▸ Recurring Entries

▸ End of Period

Reporting

▸ Legal Reports

Tax Name

Tax on magento Shipping

Tax Code

Tax Application

All

Active

☒

Tax Definition

Special Computation

Tax Computation

Tax Type

Percentage

0.20000

Tax Included in Price

☒

Invoices

Invoice Tax Account

Invoice Tax Analytic Account

Account Base Code

Base Code Sign

1.00

Account Tax Code

Tax Code Sign

1.00

Children/Sub Taxes

Tax on Children

☐

Sequence	Tax Name	Tax Included in Price	Tax Code

Magento

Is this tax used on magento ?

☒

Is this tax applied on magento shipping ?

☒

Misc

Sequence

1

Included in base amount

☐

Tax on Children

☐

Refunds

Refund Tax Account

Refund Tax Analytic Account

Refund Base Code

Base Code Sign

1.00

Refund Tax Code

Tax Code Sign

1.00

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.

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Chapter 4. How it Works

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## About Openlabs Technologies and Consulting Private Limited

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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 businesses 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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## Indices and tables

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- `genindex`
- `modindex`
- `search`