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# **Magento OpenERP Integration Documentation**

*Release 2.0dev*

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

**Jul 28, 2017**



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Contents:



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.

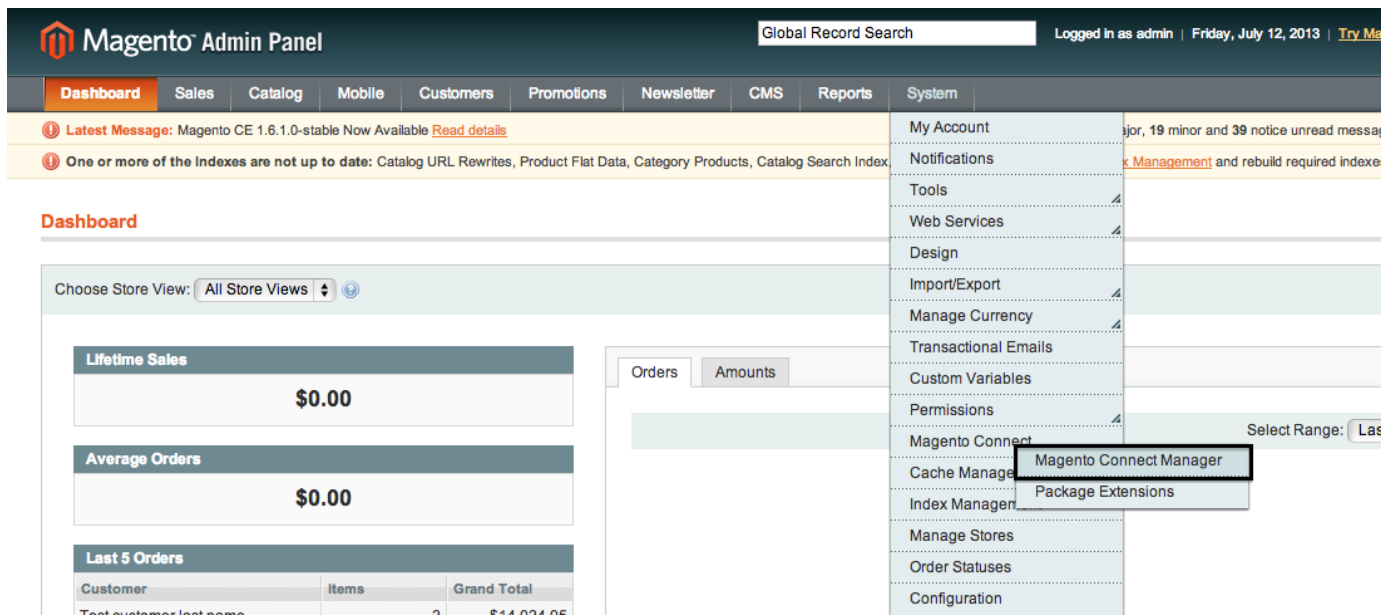
A new bridge between OpenERP and Magento has been initiated by Openlabs team. This module allows synchronization of Magento with Open ERP. It supports Synchronization of Customers, Addresses, Product Categories, Products, Order Statuses, and Orders.

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

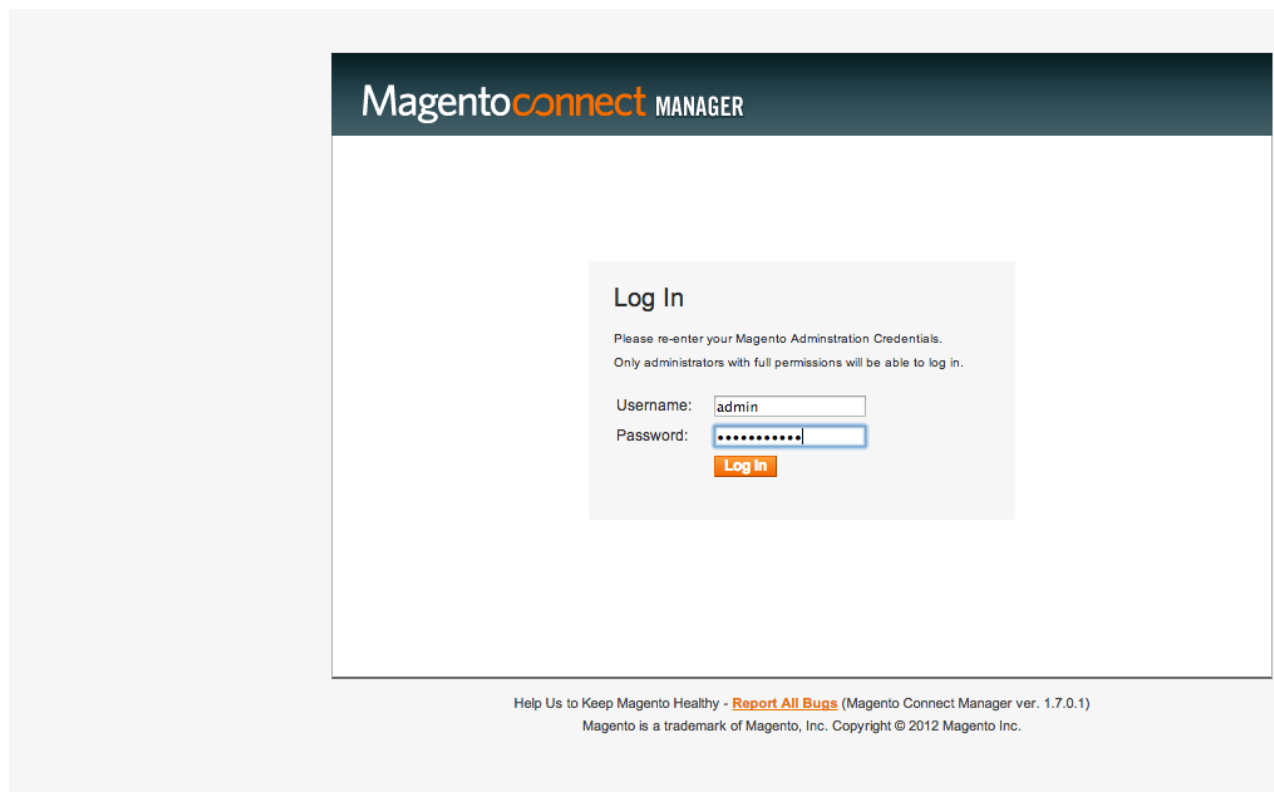
## Installation

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

1. After login to magento Admin Panel, go to  
System >> Magento Connect >> Magento Connect Manager

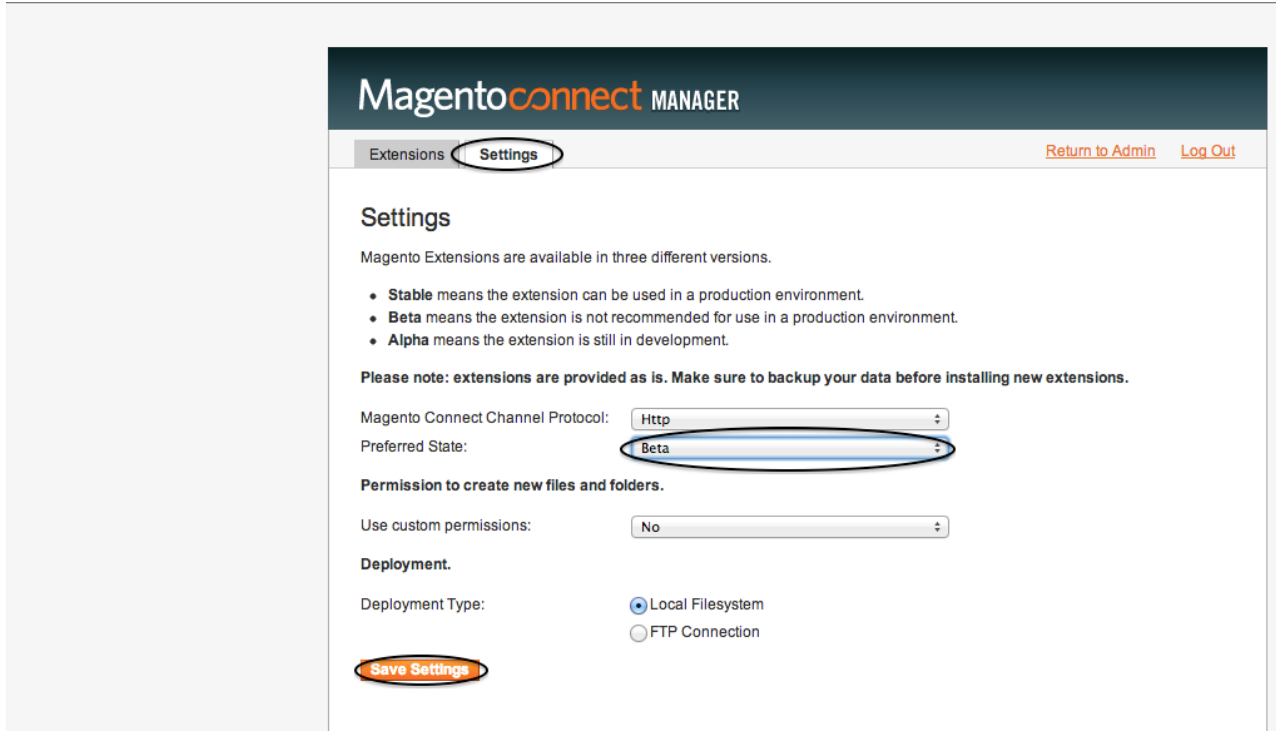


2. Key in your username and password, the same username and password you entered while login to magento



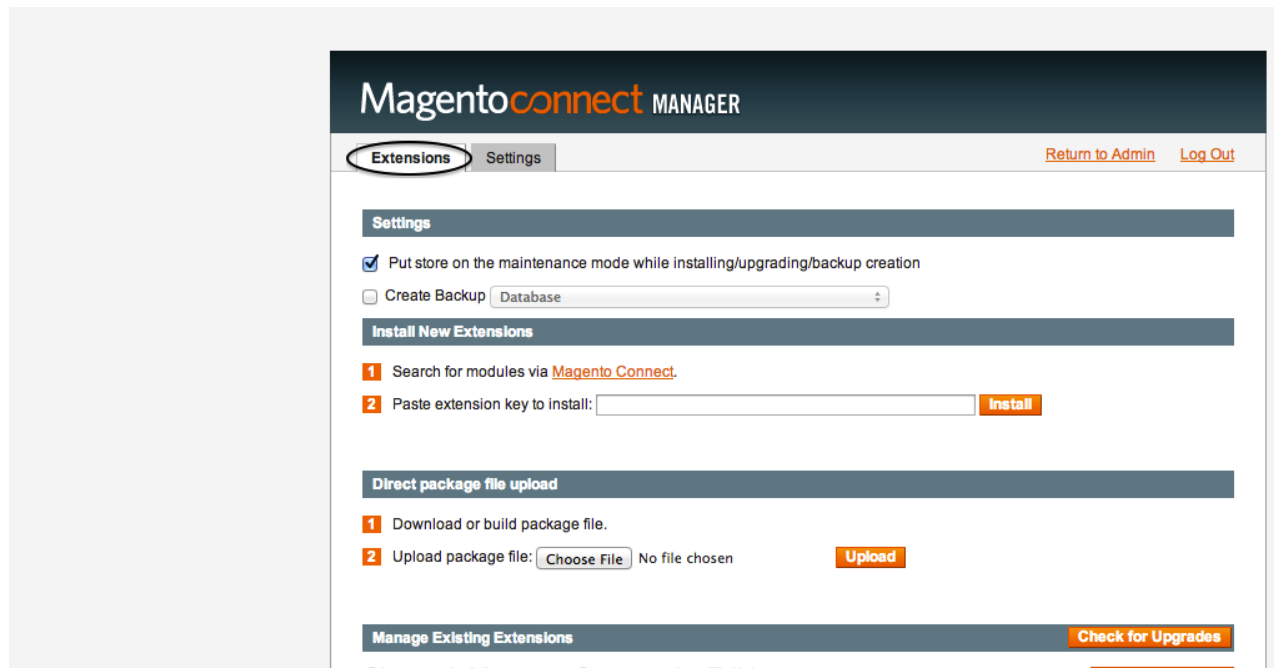
3. Click on the second tab for settings and change preferred state to 'Beta'. (As of this date the plug-in is beta). Save your settings





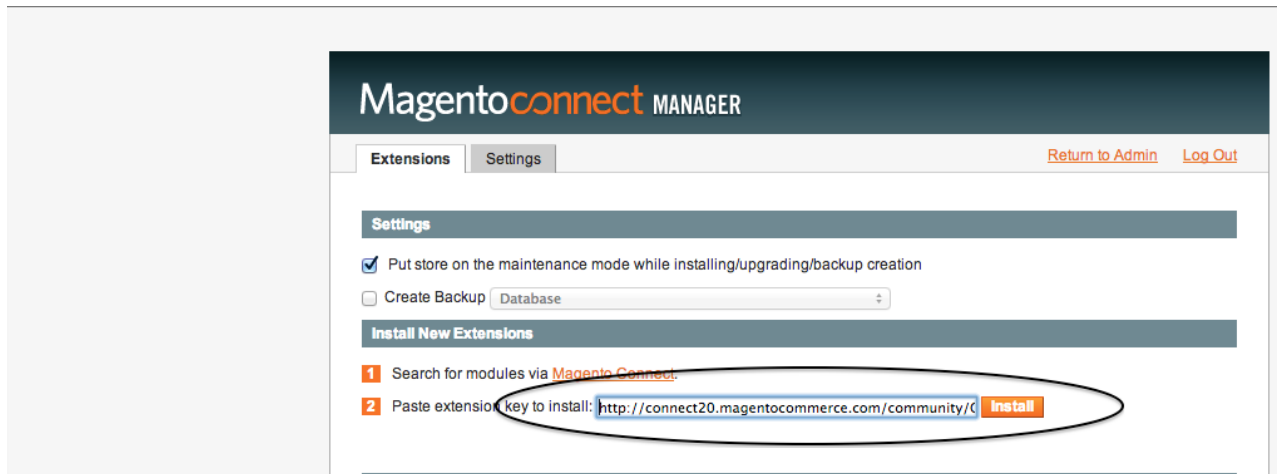
**Note:** Default state is *Stable*, change it to *Beta*.

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

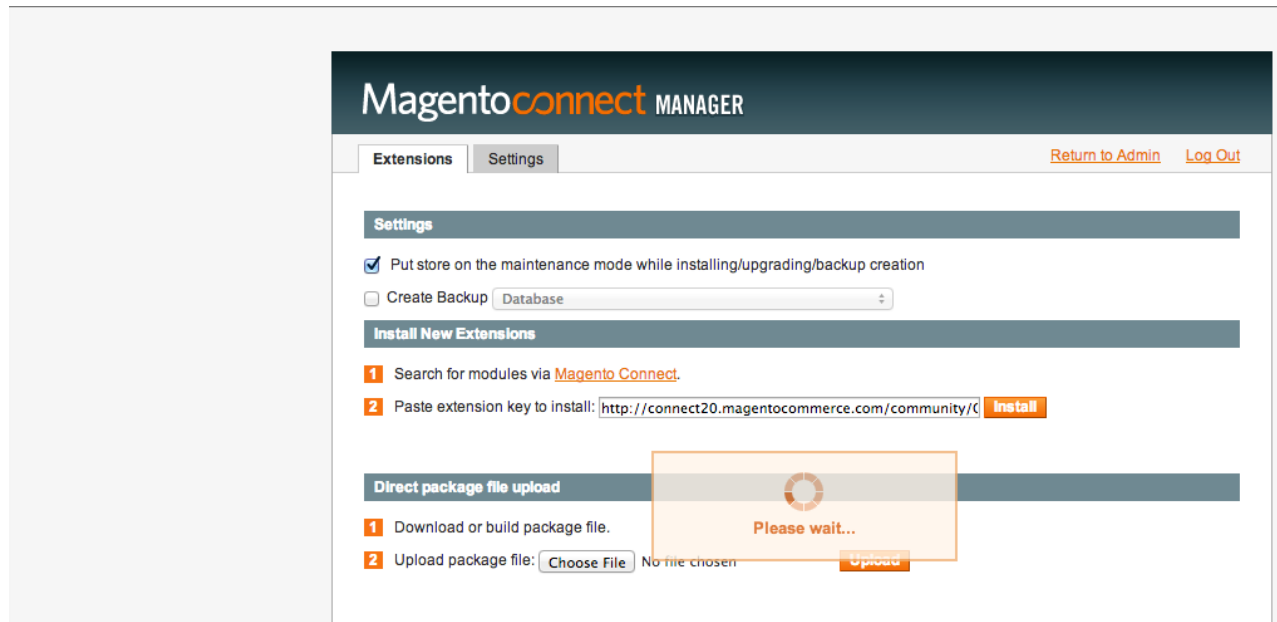


- You need to paste the following extension key in the box to install:

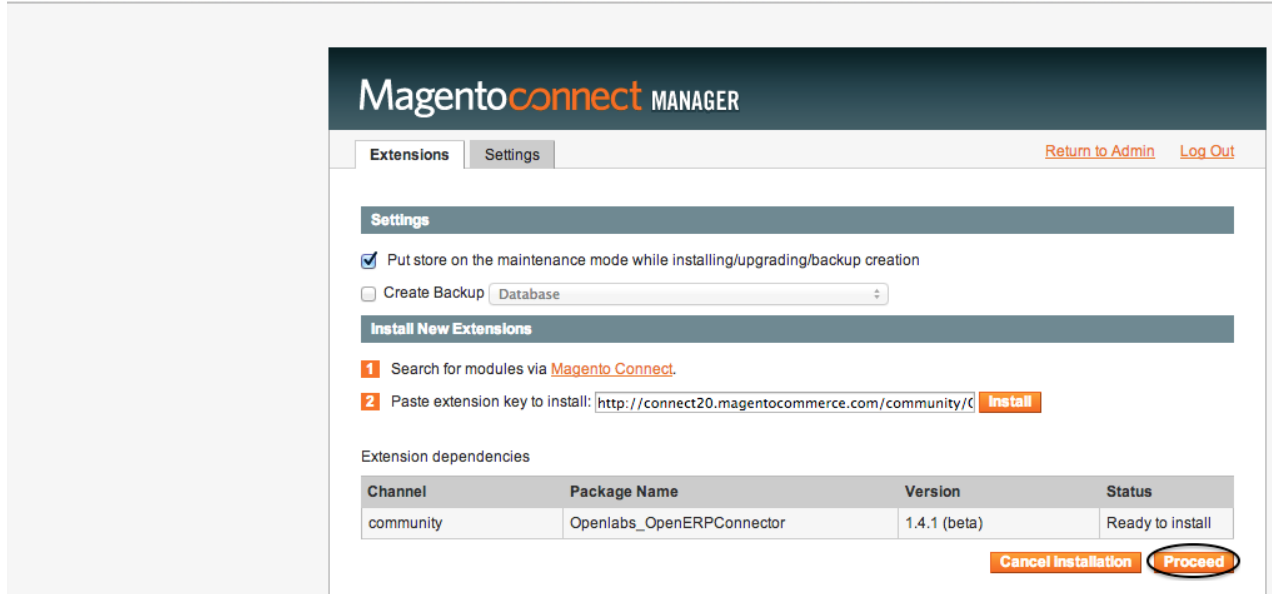
[http://connect20.magentocommerce.com/community/Openlabs\\_OpenERPConnector](http://connect20.magentocommerce.com/community/Openlabs_OpenERPConnector)



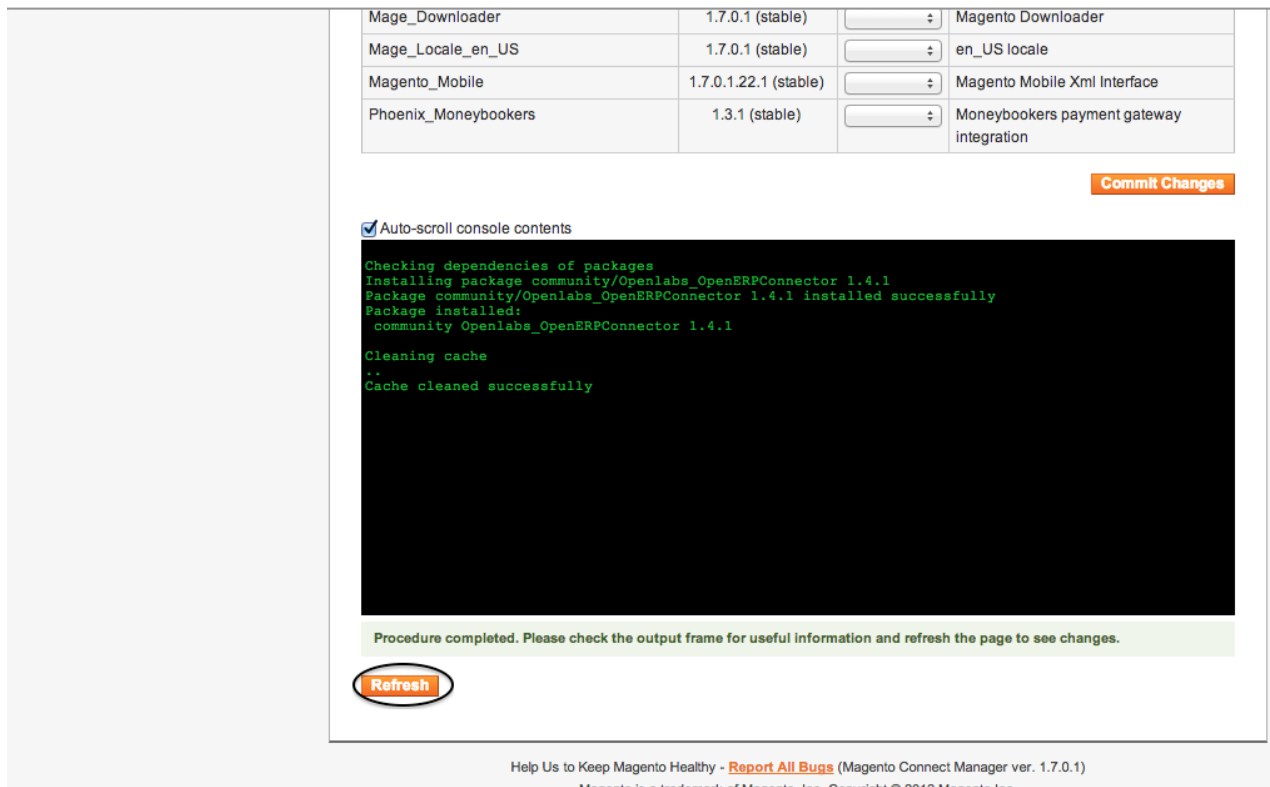
6. Click Install, and wait for the module to be shown for installation



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:

Lib_ZF	1.11.1.0 (stable)	<input type="text"/>	Zend Framework
Lib_ZF_Locale	1.11.1.0 (stable)	<input type="text"/>	Zend Framework Locale
Mage_All_Latest	1.7.0.2 (stable)	<input type="text"/>	Metapackage for latest Magento 1.7.0.2 release
Mage_Centinel	1.7.0.0 (stable)	<input type="text"/>	3D Secure Card Validation
Mage_Compiler	1.7.0.0 (stable)	<input type="text"/>	This module compiles all files of a Magento installation and creates a single include path to increase performance
Mage_Core_Adminhtml	1.7.0.1 (stable)	<input type="text"/>	Magento Administration Panel
Mage_Core_Modules	1.7.0.2 (stable)	<input type="text"/>	Collection of Magento Core Modules
Mage_Downloader	1.7.0.1 (stable)	<input type="text"/>	Magento Downloader
Mage_Locale_en_US	1.7.0.1 (stable)	<input type="text"/>	en_US locale
Magento_Mobile	1.7.0.1.22.1 (stable)	<input type="text"/>	Magento Mobile Xml Interface
Phoenix_Moneybookers	1.3.1 (stable)	<input type="text"/>	Moneybookers payment gateway integration
Openlabs_OpenERPConnector	1.4.1 (beta)	<input type="text"/>	Magento core API extension for multi website Open ERP connector by Openlabs

[Commit Changes](#)

Help Us to Keep Magento Healthy - [Report All Bugs](#) (Magento Connect Manager ver. 1.7.0.1)  
 Magento is a trademark of Magento, Inc. Copyright © 2012 Magento Inc.

## 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

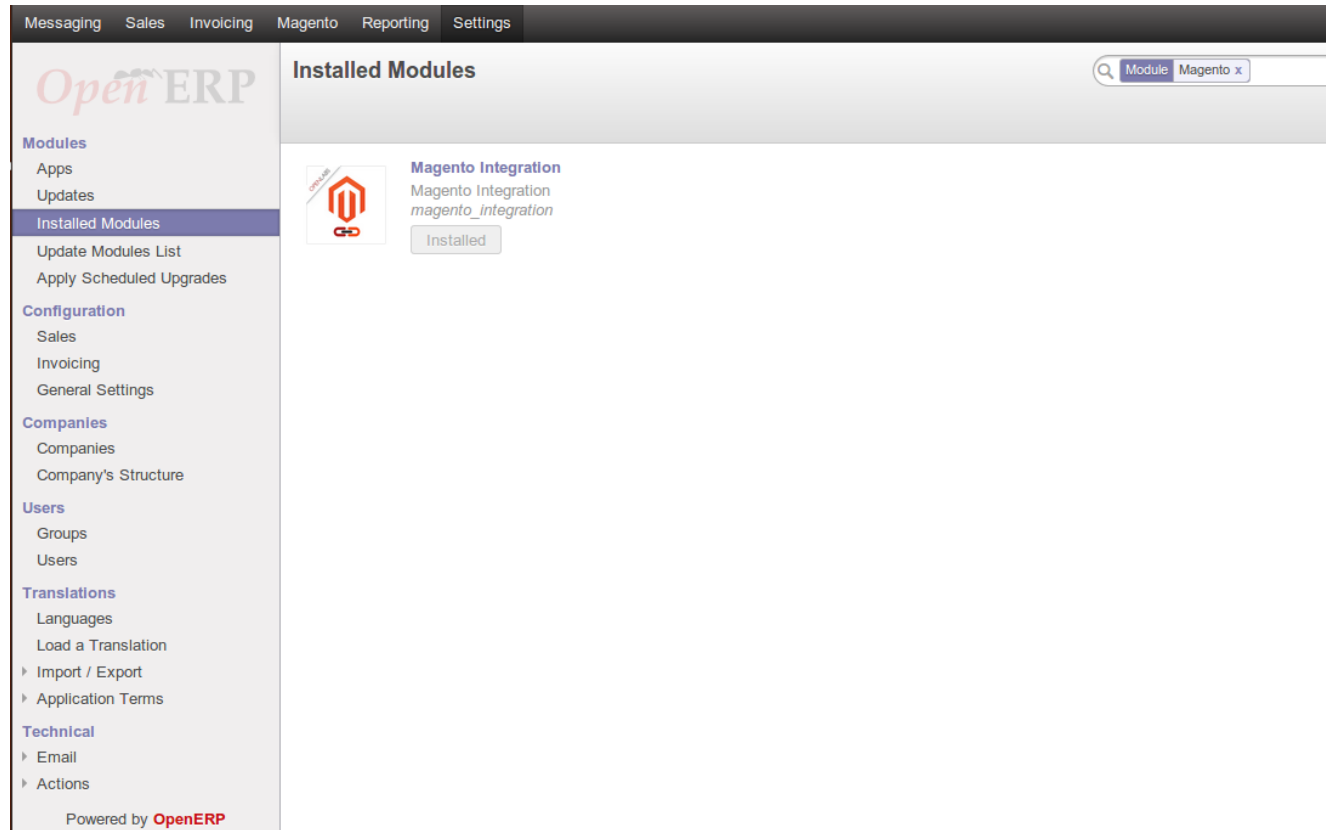
## Login to OpenERP

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

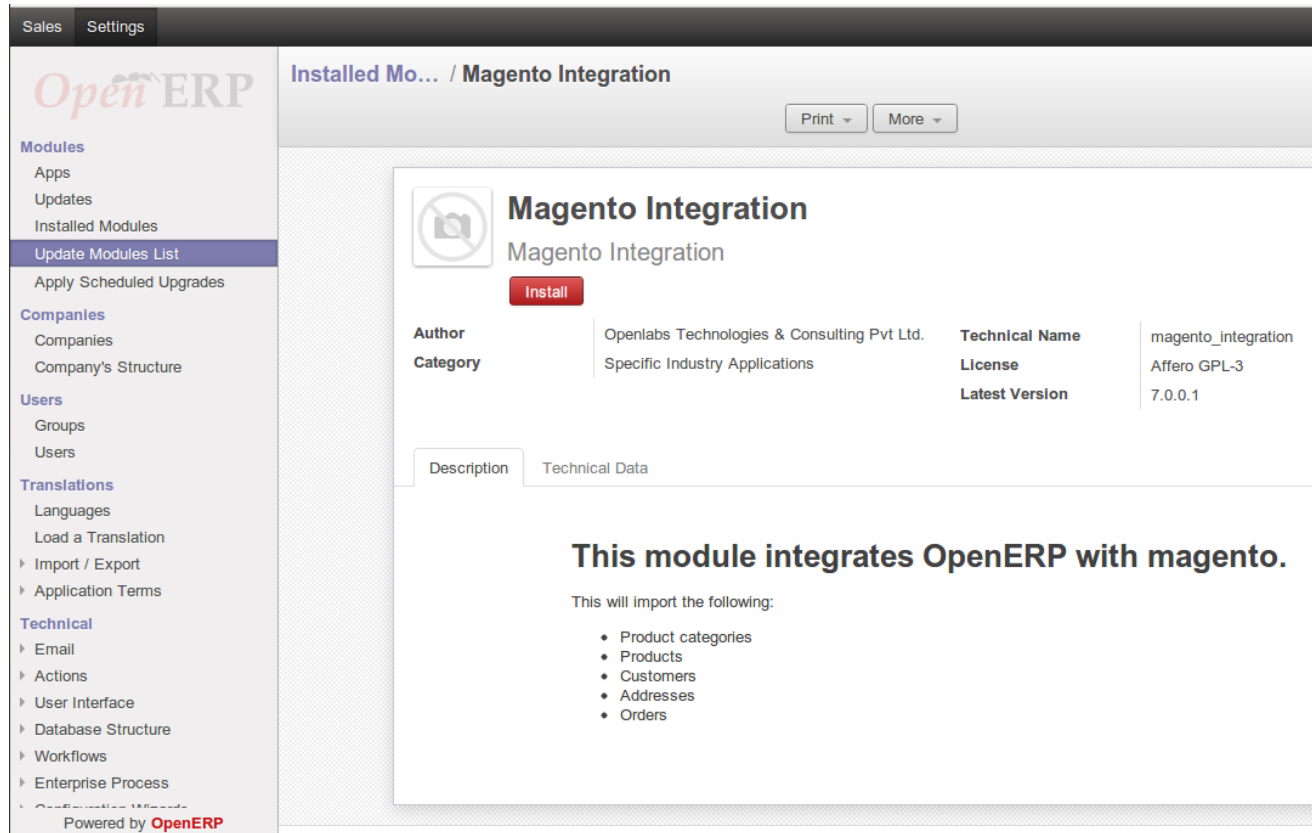
- Username: Ask your administrator for this information
- Password: Ask your administrator for this information



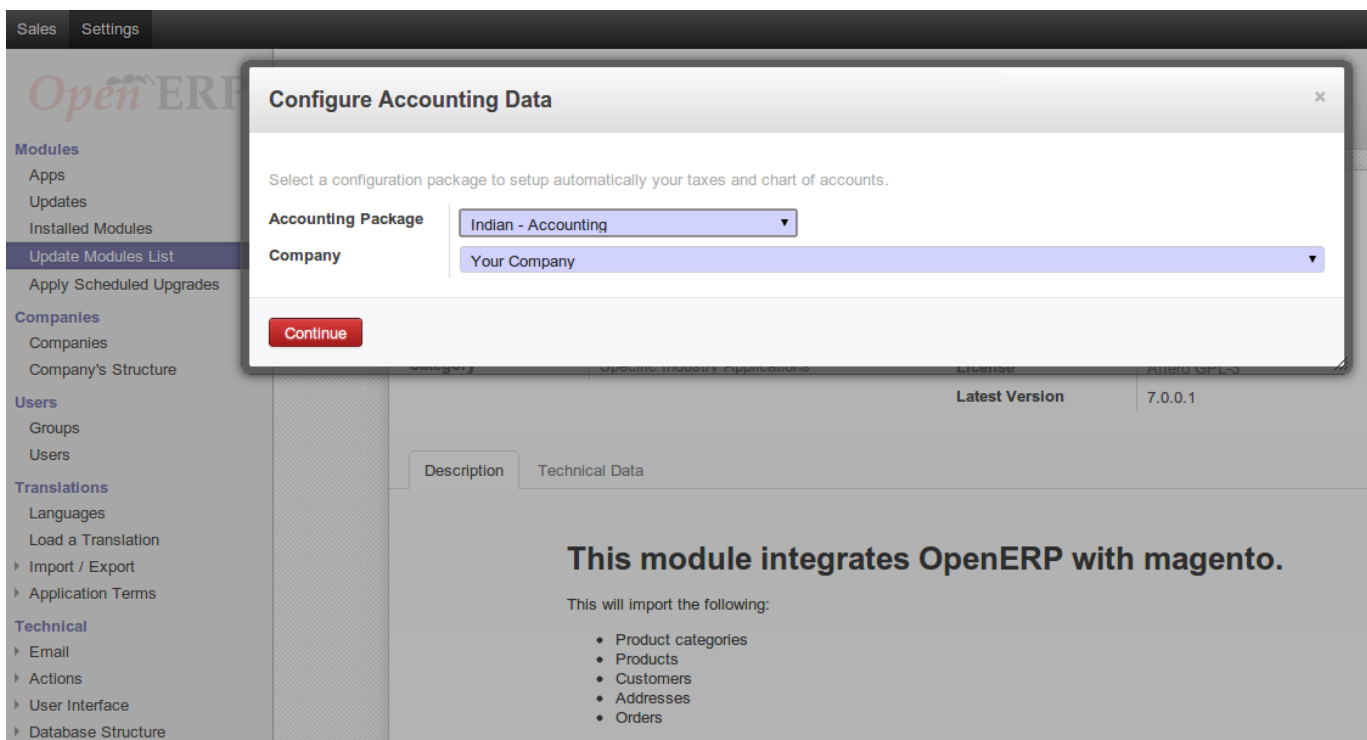
1. Go to Settings, click on *Update Modules List* shown under **Modules**
2. Search for magento module in the search bar at top-right side of the page.
3. Search returns the module named *Magento Integration*, now click on the module to install, refer below screenshot:



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](#).





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

### Magento Instance

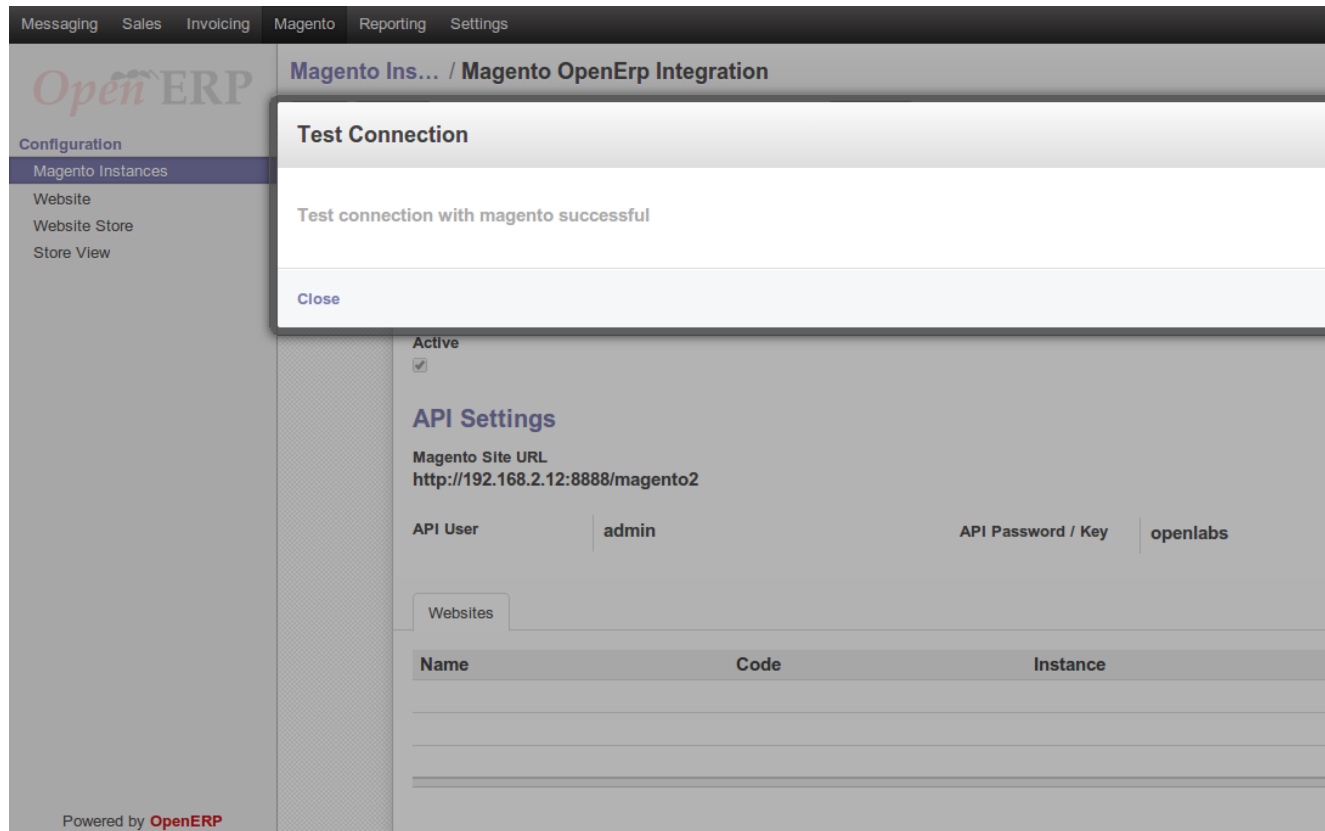
Go to Magento >> Configuration and open *Magento Instances*.

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

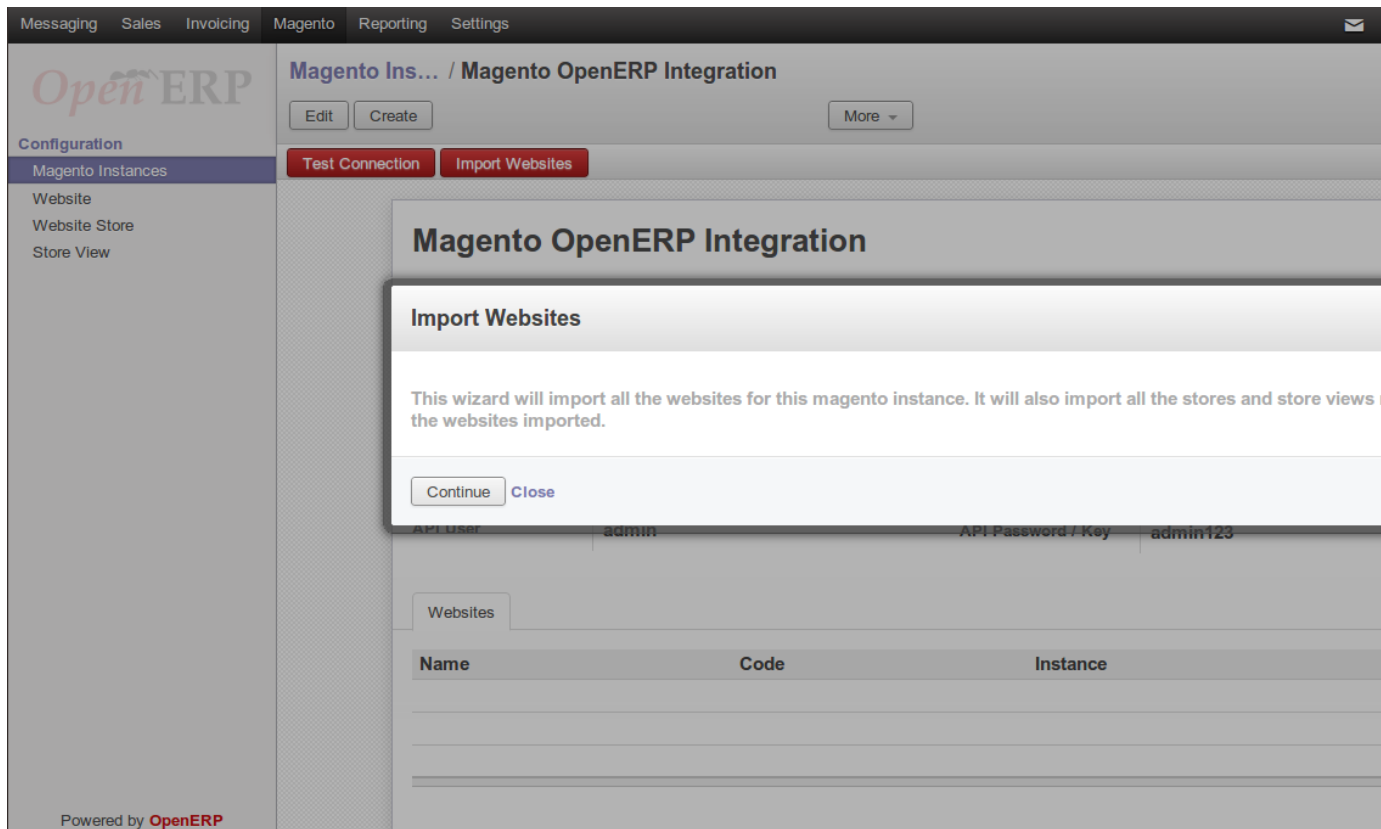
1. Create a new magento instance by clicking create.

The screenshot displays the OpenERP configuration interface for Magento integration. The top navigation bar includes 'Messaging', 'Sales', 'Invoicing', 'Magento', 'Reporting', and 'Settings'. The sidebar on the left shows the 'Configuration' menu with 'Magento Instances' selected, and sub-items for 'Website', 'Website Store', and 'Store View'. The main content area is titled 'Magento Ins... / New' and features a 'Save' button and a 'Discard' link. Below these are 'Test Connection' and 'Import Websites' buttons. The form includes fields for 'Name' (filled with 'Magento OpenERP Integration'), 'Company' (a dropdown menu showing 'Your Company'), and an 'Active' checkbox (checked). The 'API Settings' section contains 'Magento Site URL' (filled with 'http://192.168.2.12:8888/magento2'), 'API User' (filled with 'admin'), and 'API Password / Key' (filled with 'openlabs'). At the bottom, there is a 'Websites' tab and a table with columns 'Name', 'Code', and 'Instance'.

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](#).

## 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:

The screenshot shows the Magento OpenERP Integration configuration interface. The top navigation bar includes Messaging, Sales, Invoicing, Magento, Reporting, and Settings. The left sidebar shows the Configuration menu with 'Magento Instances' selected. The main content area displays the 'Magento OpenErp Integration' settings. The 'Company' section shows 'Your Company' and 'Active' status. The 'API Settings' section shows the 'Magento Site URL' as 'http://192.168.2.12:8888/magento2', 'API User' as 'admin', and 'API Password / Key' as 'openlabs'. Below this is a 'Websites' tab with a table listing two websites: 'Main Website' and 'Website 2', both with codes 'base' and 'website2' respectively, and both associated with 'Magento OpenErp Integration'.

Name	Code	Instance
Main Website	base	Magento OpenErp Integration
Website 2	website2	Magento OpenErp Integration

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

## Website Store

Magento Website Store or Store view groups

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

The screenshot displays the OpenERP configuration interface. The top navigation bar includes 'Messaging', 'Sales', 'Invoicing', 'Magento', 'Reporting', and 'Settings'. The left sidebar shows the 'Configuration' menu with sub-items: 'Magento Instances', 'Website', 'Website Store' (which is selected and highlighted), and 'Store View'. The main content area is titled 'Website Store' and features a red 'Create' button. Below the button is a table with two columns: 'Name' and 'Website'. The table contains three rows of data:

Name	Website
Main Store	Main Website
store1_website2	website2
store2_website2	website2

A search bar is located in the top right corner of the main content area. The bottom of the sidebar indicates 'Powered by OpenERP'.

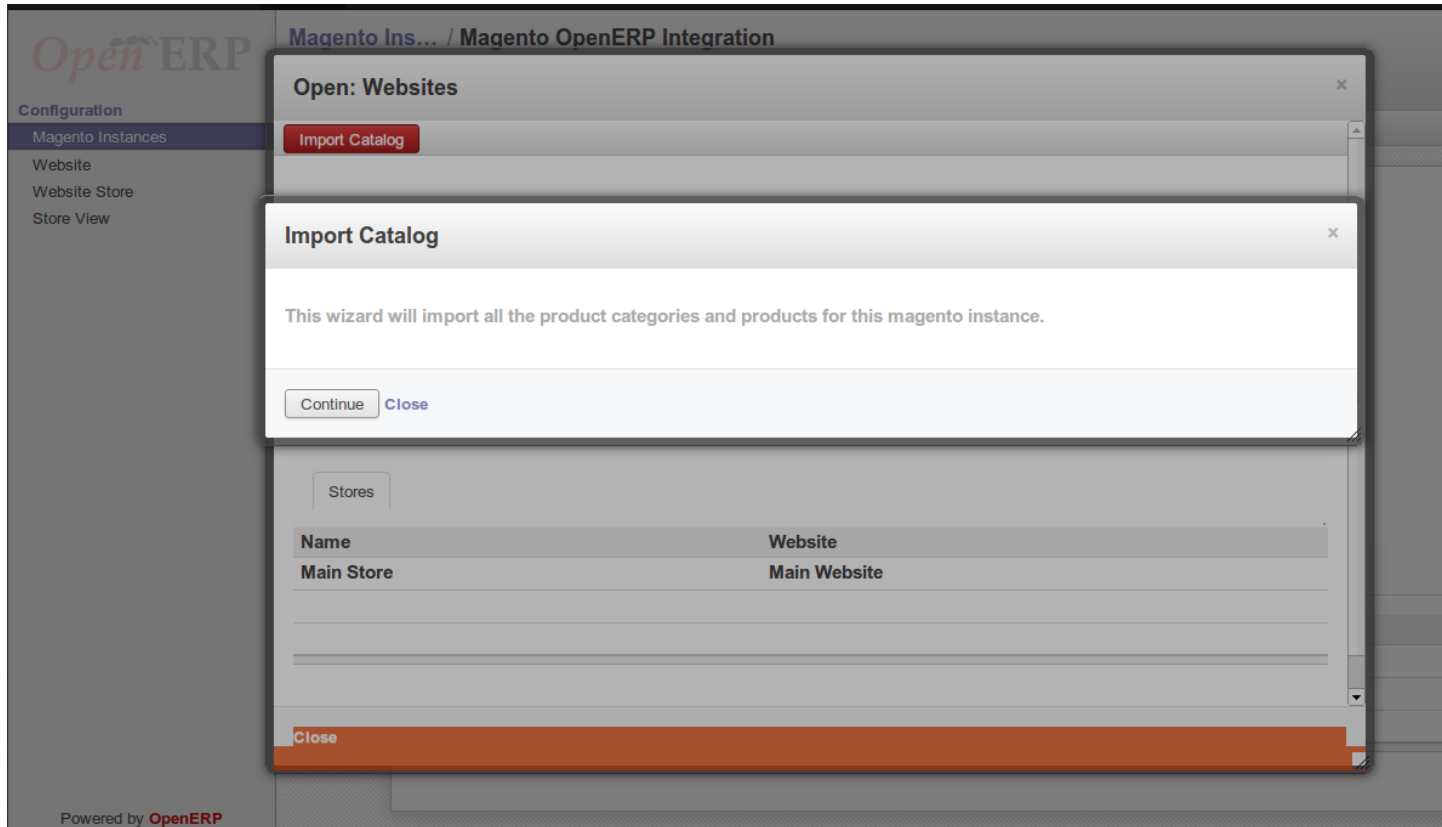
Stores are children of websites. The visibility of products and categories is managed on magento at store level by specifying the root category on a store. The setup for root catalog on stores does not reflect on OpenERP as there is no functional benefit of doing so.

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**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:

<div> <div>Messaging Sales Invoicing</div> <div>Magento Reporting Settings</div> </div>					
<div> <div>OpenERP</div> <div> <div>Configuration</div> <div>Magento Instances</div> <div>Website</div> <div>Website Store</div> <div>Store View</div> </div> </div>					
<div> <div>Powered by OpenERP</div> <div> <div>Magento Ins... / Magento Op... / Magento Ins... /</div> <div>Magento Instance Products</div> <div>Create</div> <div>1-80 o</div> </div> </div>					
<input type="checkbox"/>	Internal Reference	Name	Quantity On Hand	Quantity Available	Public Pr
<input type="checkbox"/>	1111	Ottoman	0.00	0.00	
<input type="checkbox"/>	1112	Chair	0.00	0.00	
<input type="checkbox"/>	1113	Couch	0.00	0.00	
<input type="checkbox"/>	1114	Magento Red Furniture Set	0.00	0.00	
<input type="checkbox"/>	1gbdimm	Crucial 1GB PC4200 DDR2 533MHz Memory	0.00	0.00	
<input type="checkbox"/>	1tb7200	Western Digital - 1TB HD - 7200RPM	0.00	0.00	
<input type="checkbox"/>	1yr_p_l	One Year Extended Warranty - Parts and Labor	0.00	0.00	
<input type="checkbox"/>	226bw	22" Syncmaster LCD Monitor	0.00	0.00	
<input type="checkbox"/>	250gb5400	Seagate 250GB HD - 5400RPM	0.00	0.00	
<input type="checkbox"/>	2gbdimm	Crucial 2GB PC4200 DDR2 533MHz Memory	0.00	0.00	
<input type="checkbox"/>	2yr_p_l	Two Year Extended Warranty - Parts and Labor	0.00	0.00	
<input type="checkbox"/>	384822	Akio Dresser	0.00	0.00	
<input type="checkbox"/>	3yr_p_l	Three Year Extended Warranty - Parts and Labor	0.00	0.00	
<input type="checkbox"/>	4fasd5f5	The Get Up Kids: Band Camp Pullover Hoodie	0.00	0.00	
<input type="checkbox"/>	500gb5400	Seagate 500GB HD - 5400RPM	0.00	0.00	
<input type="checkbox"/>	500gb7200	Western Digital 500GB HD - 7200RPM	0.00	0.00	
<input type="checkbox"/>	512dimm	Crucial 512MB PC4200 DDR2 533MHz Memory	0.00	0.00	
<input type="checkbox"/>	750	Olympus Stylus 750 7.1MP Digital Camera	0.00	0.00	
<input type="checkbox"/>	8525PDA	AT&T 8525 PDA	0.00	0.00	

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

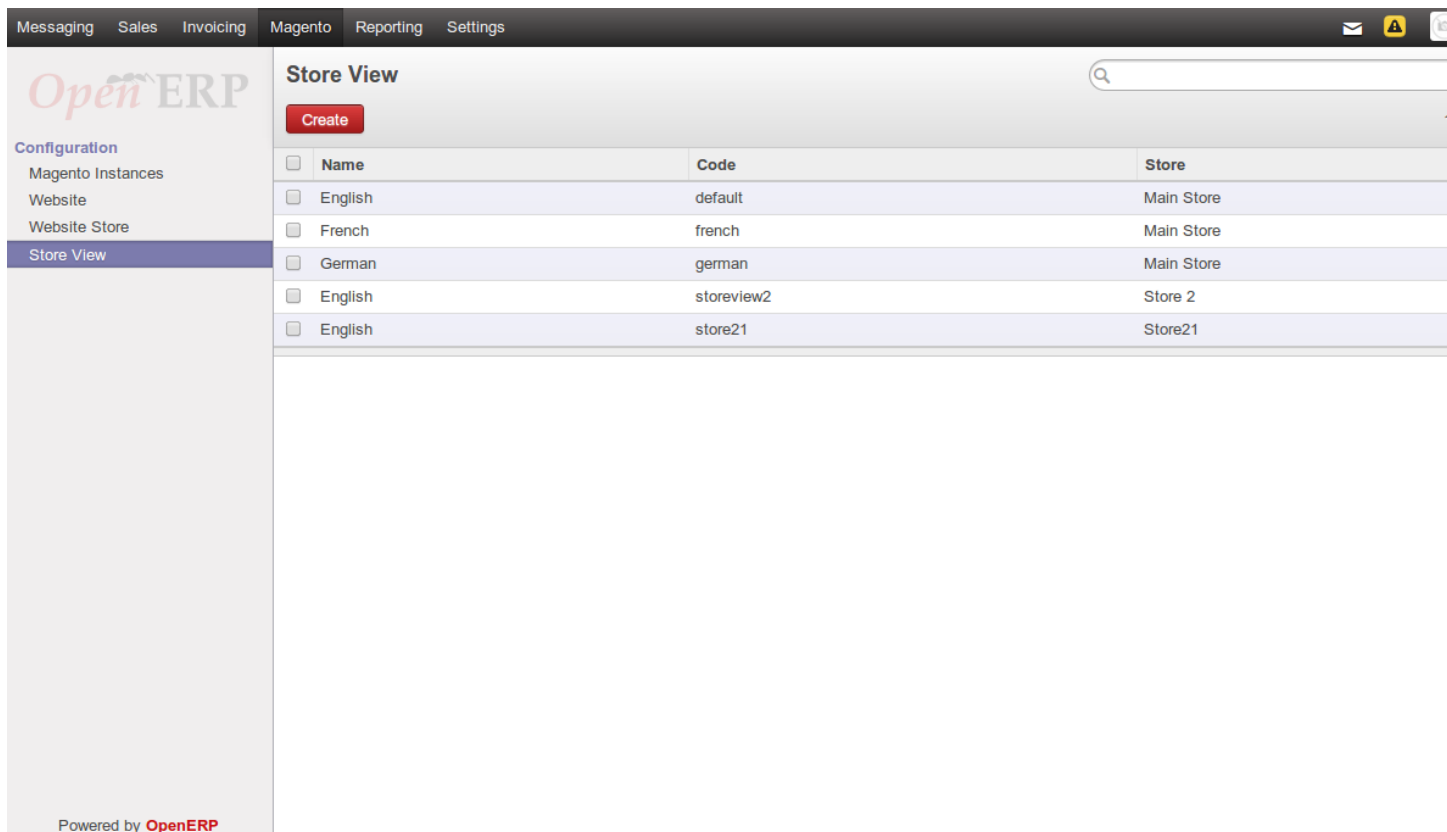
## Store View

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 has a sidebar with navigation links: 'Configuration', 'Magento Instances', 'Website', 'Website Store', and 'Store View' (which is selected). The main content area shows a table of store views. At the top of the table is a 'Create' button. The table has three columns: 'Name', 'Code', and 'Store'. There are six rows of data, each with a checkbox in the first column.

<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

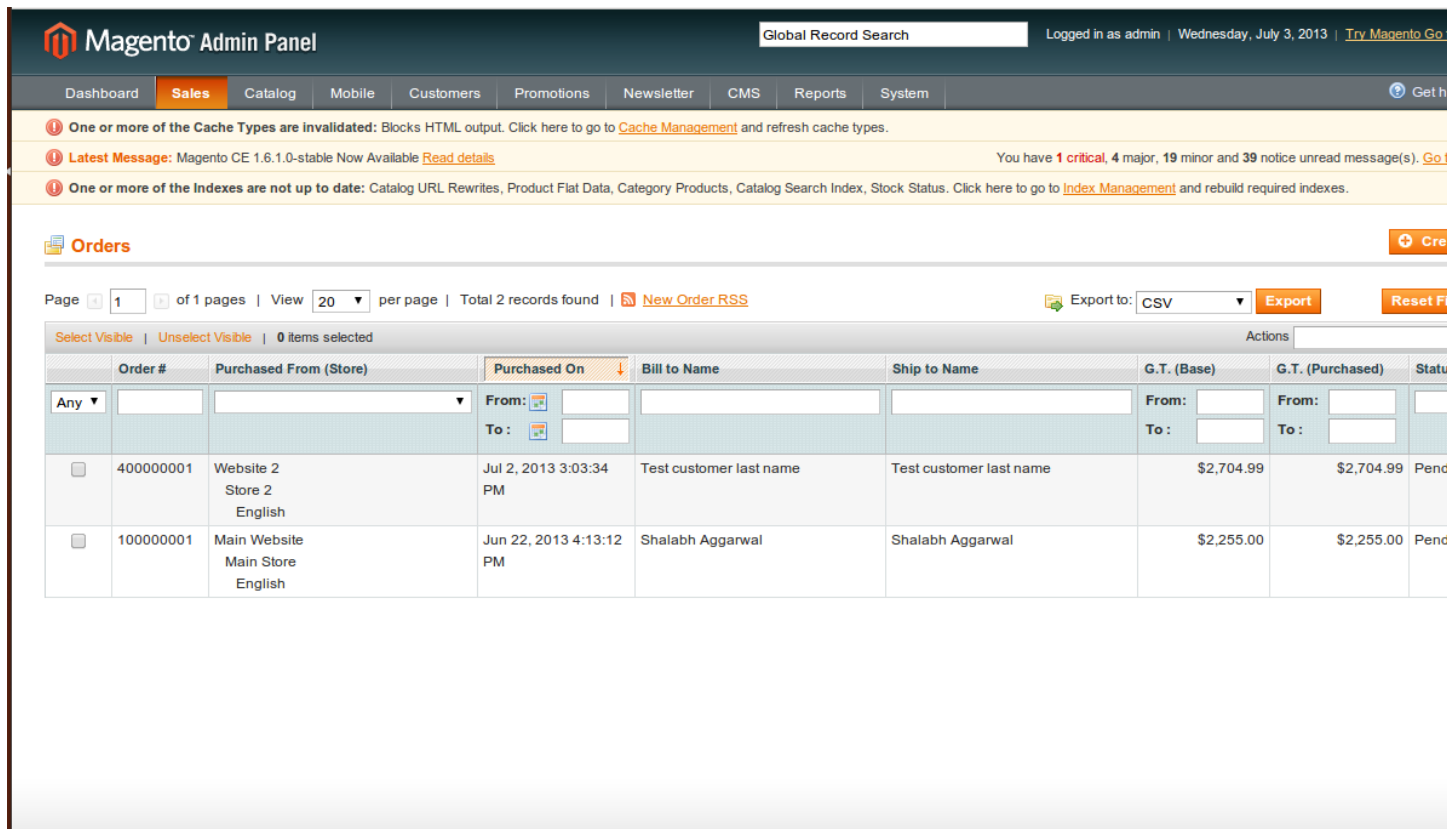
At the bottom of the sidebar, it says 'Powered by OpenERP'.



## CHAPTER 3

### 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 displays the Magento Admin Panel interface. At the top, there's a navigation bar with tabs for Dashboard, Sales (active), 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 content area is titled "Orders" and shows a list of orders. The table has columns for Order #, Purchased From (Store), Purchased On, Bill to Name, Ship to Name, G.T. (Base), G.T. (Purchased), and Status. Two orders are visible: one from Website 2 Store 2 English and another from Main Website Main Store English.

	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status
Any ▾			From: <input type="text"/> To: <input type="text"/>			From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	
<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
<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	Pending

#### Orders in Magento

Global Record Search

Logged in as admin | Wednesday, July 3, 2013 | [Try Magento CE](#)

Dashboard

Sales

Catalog

Mobile

Customers

Promotions

Newsletter

CMS

Reports

System

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](#)

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

Information

Invoices

Credit Memos

Shipments

Comments History

Transactions

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

Back

Edit

Cancel

Send Email

Hold

Print

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

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

Print

Items Ordered

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

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	
Shipping & Handling	
Grand Total	
Total Paid	
Total Refunded	
Total Due	

[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](#)

[Profiler](#)

Memory usage: real: 26214400, emalloc: 25871984

22e Profiler

Time

Cnt

Emalloc

RealMem

## CHAPTER 4

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### How it Works

---

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

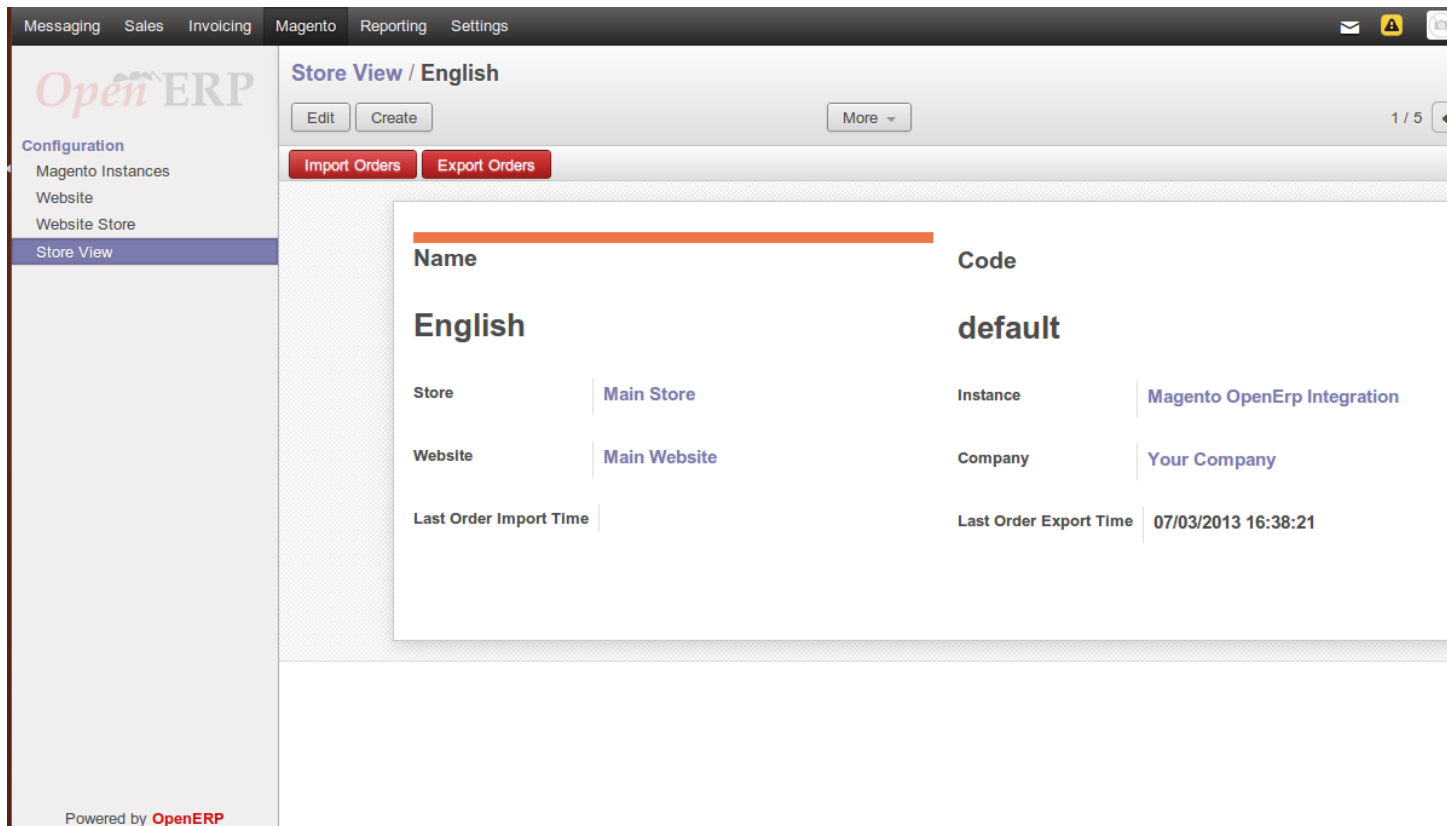
---

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

---

### Orders are imported as Sales

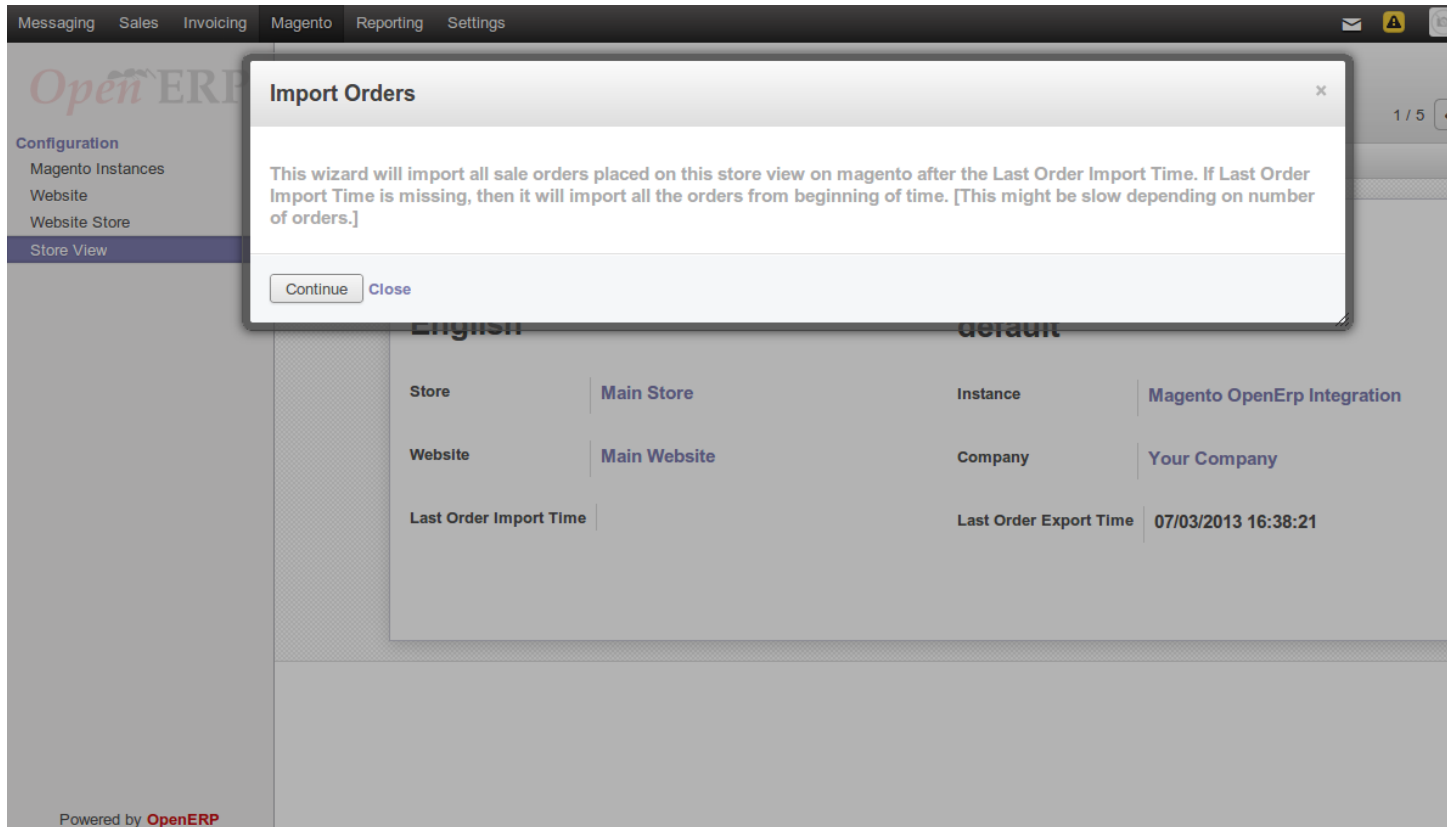
Orders placed in Magento Admin Panel are imported in OpenERP from `Store View`. See below:



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

[Messaging](#)
[Sales](#)
[Invoicing](#)
[Magento](#)
[Reporting](#)
[Settings](#)

OpenERP

[Sales](#)

[Customers](#)
[Quotations](#)
[Sales Orders](#)

[Products](#)

[Products by Category](#)
[Products](#)

[Configuration](#)

[Unit of Measure Categories](#)

[Address Book](#)
[Products](#)

Sales Orders / mag\_100000001

[Edit](#)
[Create](#)

[Print](#)
[More](#)

[Create Invoice](#)
[Cancel Order](#)

[Draft Quotation](#)
[Quotation Sent](#)
[Sale to Invoice](#)

Sales Order mag\_100000001

Customer

Shalabh Aggarwal  
street 1  
street 2  
test city 123456  
Delhi  
India

Date

06/22/2013

Shop

Your Company

Customer Reference

Order Lines

Other Information

Product	Description	Quantity	Taxes	Unit Price	Subtotal
[test_monitor] A test monitor	A test monitor	1.000		2250.00	2250.00
[226bw] 22" Syncmaster LCD Monitor	22" Syncmaster LCD Monitor	1.000		0.00	0.00
	Magento Shipping	1.000		5.00	5.00

Untaxed Amount :

2255.00

Taxes :

0.00

Total :

2255.00

[Send a message](#)
or
[Log a note](#)

Quotation confirmed

• Customer: Shalabh Aggarwal

• Status: Draft Quotation → Sale to Invoice

• Untaxed Amount: 2255.0

Administrator updated document • about a minute ago • like

Document created

Administrator updated document • about a minute ago • like

Following

☒ Discussions
☐ Quotation sent
☐ Sales Order Confirmed

2 followers

[Add others](#)

Administrator

Shalabh Aggarwal

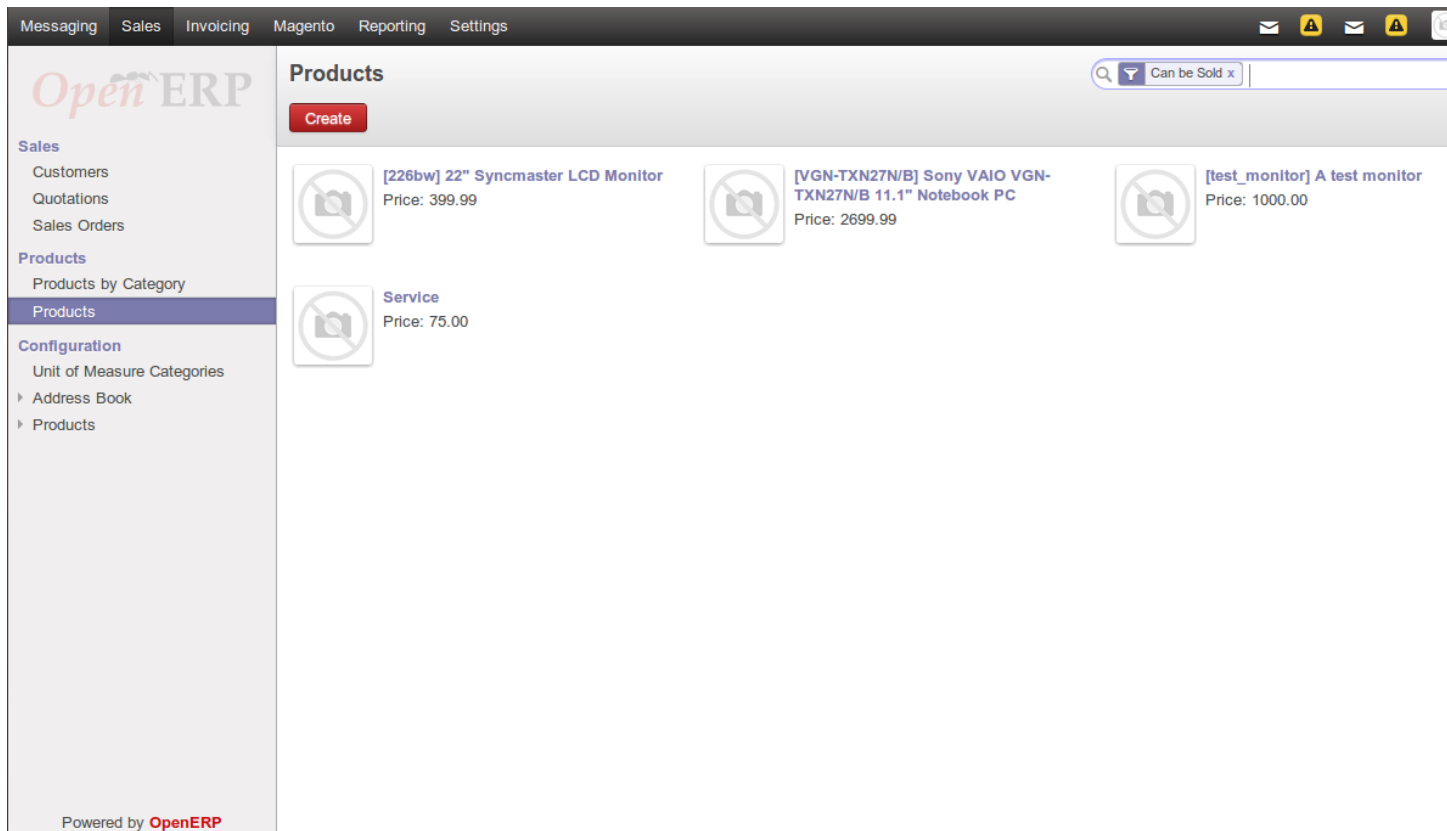
Powered by OpenERP

**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

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Chapter 4. How it Works



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.

## 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:

The screenshot shows the OpenERP Sales Orders interface. The left sidebar contains a menu with 'Sales' (Customers, Quotations, Sales Orders), 'Products' (Products by Category, Products), and 'Configuration' (Unit of Measure Categories, Address Book, Products). The main header displays 'Sales Orders / mag\_400000001' with buttons for 'Edit', 'Create', 'Print', and 'More'. Below the header, there are buttons for 'Create Invoice' and 'Cancel Order', with the latter highlighted by a red box. The main content area shows the 'Sales Order mag\_400000001' details, including customer information (Test customer last name, test street1, test street 2, test city, AL 12345, United States) and order lines (Sony VAIO VGN-TXN27N/B 11.1" Notebook PC).

Now state has been changed to cancelled, see below

### Cancelled Sale Order

The screenshot shows the OpenERP Sales Orders interface with the sales order 'mag\_400000001' in a 'Cancelled' state. The left sidebar is the same as the previous screenshot. The main header displays 'Sales Orders / mag\_400000001' with buttons for 'Edit', 'Create', 'Print', and 'More'. Below the header, there are buttons for 'New Copy of Quotation', 'Draft Quotation', 'Quotation Sent', and 'Cancelled'. The main content area shows the 'Sales Order mag\_400000001' details, including customer information (Test customer last name, test street1, test street 2, test city, AL 12345, United States) and order lines (Sony VAIO VGN-TXN27N/B 11.1" Notebook PC, Magento Shipping). The bottom right corner shows the total amount: 2704.99 €.

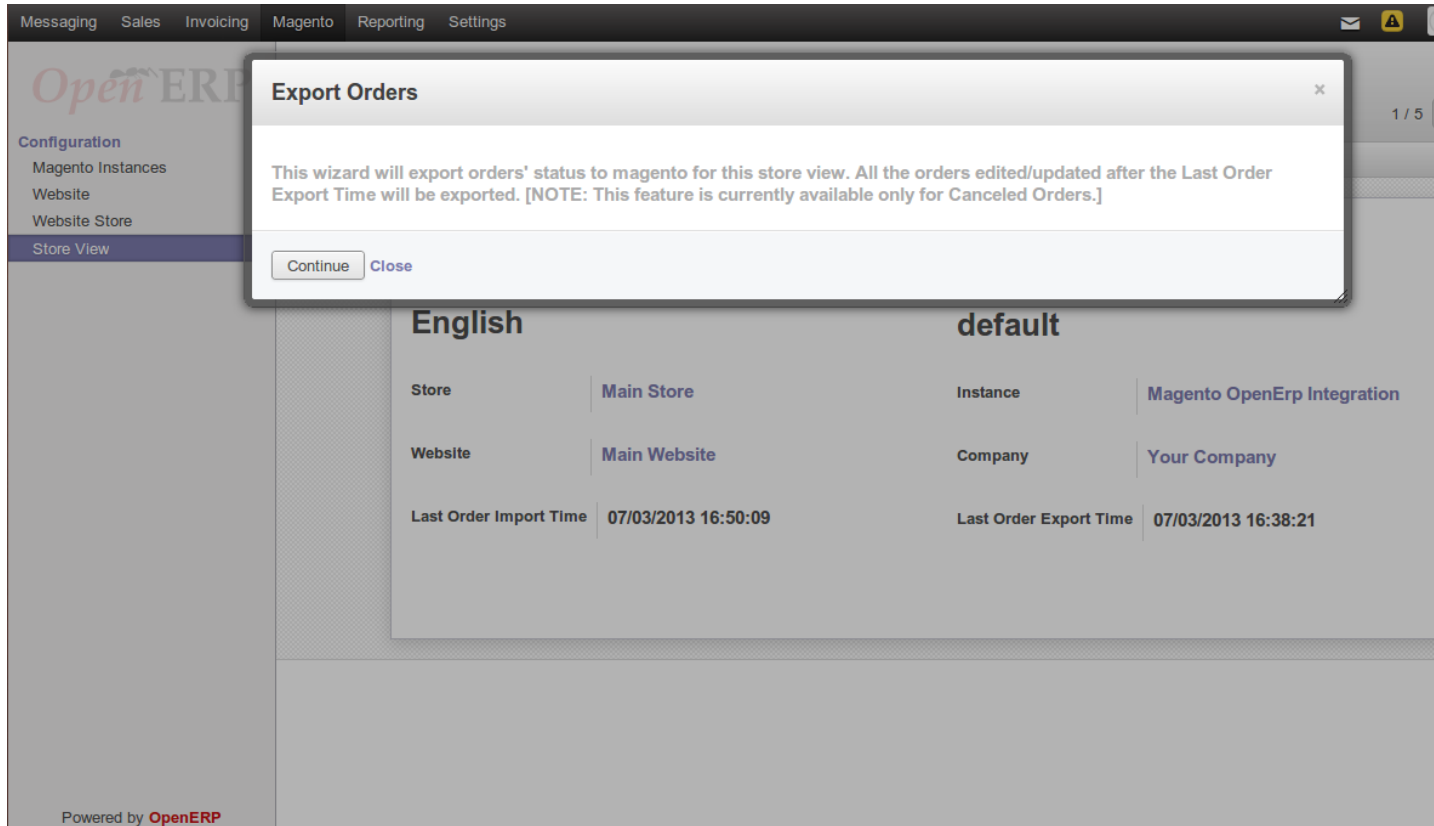
Product	Description	Quantity	Taxes	Unit Price	Subtotal
[VGN-TXN27N/B] Sony VAIO VGN-TXN27N/B 11.1" Notebook PC	Sony VAIO VGN-TXN27N/B 11.1" Notebook PC	1.000		2699.99	2699.99
	Magento Shipping	1.000		5.00	5.00
Untaxed Amount :					2704.99
Taxes :					0.00
Total :					2704.99 €

Now to export the changes to Magento, refer [export order](#)



## 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.



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 | [Try Magento CE](#)

Dashboard
**Sales**
Catalog
Mobile
Customers
Promotions
Newsletter
CMS
Reports
System

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](#)

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

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

Select Visible | Unselect Visible | 0 items selected

	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	St
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	Pe
<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	Ca

[Help Us Keep Magento Healthy - Report All Bugs](#)

Interface Locale: English (United States) / English

Magento ver. 1.7.0.2

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[profiler]

Memory usage: real: 17825792, emalloc: 17558048

Code ProfilerTimeCntEmallocRealMem

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

## 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.

The screenshot shows the 'Taxes / ST11' configuration page in OpenERP. The left sidebar contains a navigation menu with categories like Customers, Suppliers, Bank and Cash, Journal Entries, Charts, Payment Follow-up, Periodic Processing, Reporting, and Configuration. The main content area has several sections: 'Tax Definition' (Tax Name: Standard rate sales (20%), Tax Code: ST11), 'Tax Computation' (Tax Type: Percentage, Tax included in Price: 0.20000), 'Invoices' (Invoice Tax Account: 220000 Sales Tax Control Account, Invoice Tax Analytic Account: 6 - Total value of sales ex VAT (box 8 included), Account Base Code: 1.00, Base Code Sign: 1 - VAT on Sales and other outputs, Account Tax Code: 1.00, Tax Code Sign: 1.00), 'Children/Sub Taxes' (Tax on Children: unchecked), and 'Magento' (Is this tax used on magento?: checked, Is this tax applied on magento shipping?: unchecked). The 'Misc' and 'Refunds' sections are also visible on the right.

See screenshot below:

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

The screenshot shows the 'Edit Rule' page in OpenERP. The page has a header with 'Edit Rule' and buttons for 'Back', 'Reset', 'Delete Rule', 'Save Rule', and 'Save a'. The main content area is titled 'Tax Rule Information' and contains four fields: 'Name \*' (Retail Customer-Taxable Goods-Rate 1), 'Customer Tax Class \*' (Retail Customer), 'Product Tax Class \*' (Taxable Goods), and 'Tax Rate \*' (US-CA-\*--Rate 1). The 'Shipping' checkbox is checked, and the 'VAT Standard' option is selected under the 'Product Tax Class' and 'Tax Rate' fields.

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.

## 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:

<ul style="list-style-type: none"> <li>Customer Invoices</li> <li>Customer Refunds</li> <li>Sales Receipts</li> <li>Customer Payments</li> <li>Customers</li> <li><b>Suppliers</b> <ul style="list-style-type: none"> <li>Supplier Invoices</li> <li>Supplier Refunds</li> <li>Purchase Receipts</li> <li>Supplier Payments</li> <li>Suppliers</li> </ul> </li> <li><b>Bank and Cash</b> <ul style="list-style-type: none"> <li>Bank Statements</li> <li>Cash Registers</li> </ul> </li> <li><b>Journal Entries</b> <ul style="list-style-type: none"> <li>Journal Items</li> <li>Journal Entries</li> <li>Journal Vouchers</li> <li>Analytic Journal Items</li> </ul> </li> <li><b>Charts</b> <ul style="list-style-type: none"> <li>Chart of Accounts</li> <li>Chart of Analytic Accounts</li> <li>Chart of Taxes</li> </ul> </li> <li><b>Payment Follow-up</b> <ul style="list-style-type: none"> <li>Reconcile Invoices &amp; Pay...</li> <li>Send Letters and Emails</li> <li>Do Manual Follow-Ups</li> </ul> </li> <li><b>Periodic Processing</b> <ul style="list-style-type: none"> <li>▶ Draft Entries</li> <li>▶ Reconciliation</li> <li>▶ Recurring Entries</li> <li>▶ End of Period</li> </ul> </li> <li><b>Reporting</b> <ul style="list-style-type: none"> <li>▶ Legal Reports</li> </ul> </li> </ul>	<table> <tr> <td><b>Tax Name</b></td> <td>Tax on magento Shipping</td> <td><b>Tax Application</b></td> <td>All</td> </tr> <tr> <td><b>Tax Code</b></td> <td></td> <td><b>Active</b></td> <td><input checked="" type="checkbox"/></td> </tr> </table> <div> Tax Definition Special Computation </div> <h3>Tax Computation</h3> <table> <tr> <td><b>Tax Type</b></td> <td>Percentage</td> </tr> <tr> <td></td> <td>0.20000</td> </tr> <tr> <td><b>Tax Included in Price</b></td> <td><input checked="" type="checkbox"/></td> </tr> </table> <h3>Invoices</h3> <table> <tr> <td><b>Invoice Tax Account</b></td> <td></td> </tr> <tr> <td><b>Invoice Tax Analytic Account</b></td> <td></td> </tr> <tr> <td><b>Account Base Code</b></td> <td></td> </tr> <tr> <td><b>Base Code Sign</b></td> <td>1.00</td> </tr> <tr> <td><b>Account Tax Code</b></td> <td></td> </tr> <tr> <td><b>Tax Code Sign</b></td> <td>1.00</td> </tr> </table> <h3>Children/Sub Taxes</h3> <p><b>Tax on Children</b> <input type="checkbox"/></p> <table> <thead> <tr> <th>Sequence</th> <th>Tax Name</th> <th>Tax Included in Price</th> <th>Tax Code</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> <h3>Magento</h3> <table> <tr> <td><b>Is this tax used on magento ?</b></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td><b>Is this tax applied on magento shipping ?</b></td> <td><input checked="" type="checkbox"/></td> </tr> </table>	<b>Tax Name</b>	Tax on magento Shipping	<b>Tax Application</b>	All	<b>Tax Code</b>		<b>Active</b>	<input checked="" type="checkbox"/>	<b>Tax Type</b>	Percentage		0.20000	<b>Tax Included in Price</b>	<input checked="" type="checkbox"/>	<b>Invoice Tax Account</b>		<b>Invoice Tax Analytic Account</b>		<b>Account Base Code</b>		<b>Base Code Sign</b>	1.00	<b>Account Tax Code</b>		<b>Tax Code Sign</b>	1.00	Sequence	Tax Name	Tax Included in Price	Tax Code													<b>Is this tax used on magento ?</b>	<input checked="" type="checkbox"/>	<b>Is this tax applied on magento shipping ?</b>	<input checked="" type="checkbox"/>	<h3>Misc</h3> <table> <tr> <td><b>Sequence</b></td> <td>1</td> </tr> <tr> <td><b>Included in base amount</b></td> <td><input type="checkbox"/></td> </tr> <tr> <td><b>Tax on Children</b></td> <td><input type="checkbox"/></td> </tr> </table> <h3>Refunds</h3> <table> <tr> <td><b>Refund Tax Account</b></td> <td></td> </tr> <tr> <td><b>Refund Tax Analytic Account</b></td> <td></td> </tr> <tr> <td><b>Refund Base Code</b></td> <td></td> </tr> <tr> <td><b>Base Code Sign</b></td> <td>1.00</td> </tr> <tr> <td><b>Refund Tax Code</b></td> <td></td> </tr> <tr> <td><b>Tax Code Sign</b></td> <td>1.00</td> </tr> </table>	<b>Sequence</b>	1	<b>Included in base amount</b>	<input type="checkbox"/>	<b>Tax on Children</b>	<input type="checkbox"/>	<b>Refund Tax Account</b>		<b>Refund Tax Analytic Account</b>		<b>Refund Base Code</b>		<b>Base Code Sign</b>	1.00	<b>Refund Tax Code</b>		<b>Tax Code Sign</b>	1.00
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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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### 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.

### Technical Support

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## CHAPTER 6

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### Indices and tables

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