
Magento OpenERP Integration Documentation

Release 1.0

Openlabs Technologies & Consulting (P) Limited

September 11, 2015

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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.

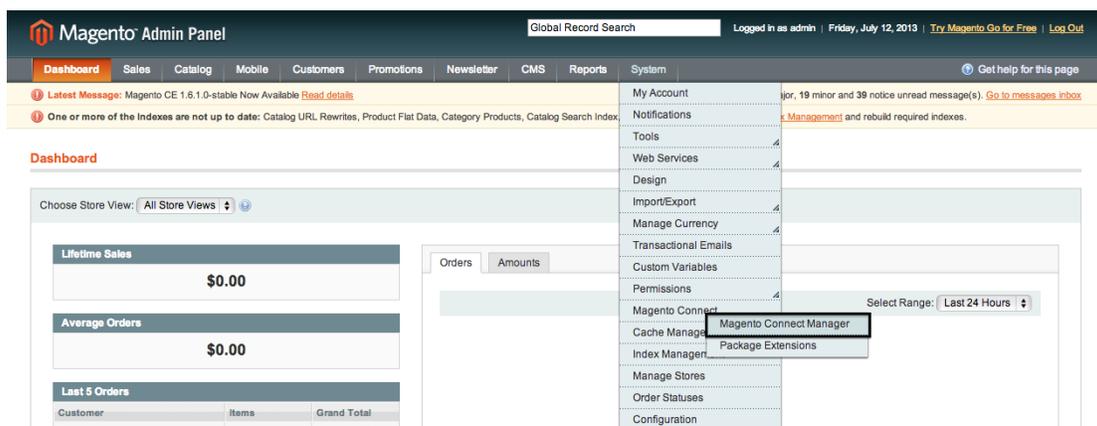
A new bridge between OpenERP and Magento has been initiated by Openlabs team. This module allows synchronization of Magento with Open ERP. It supports Synchronization of Customers, Addresses, Product Categories, Products, Order Statuses, and Orders.

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

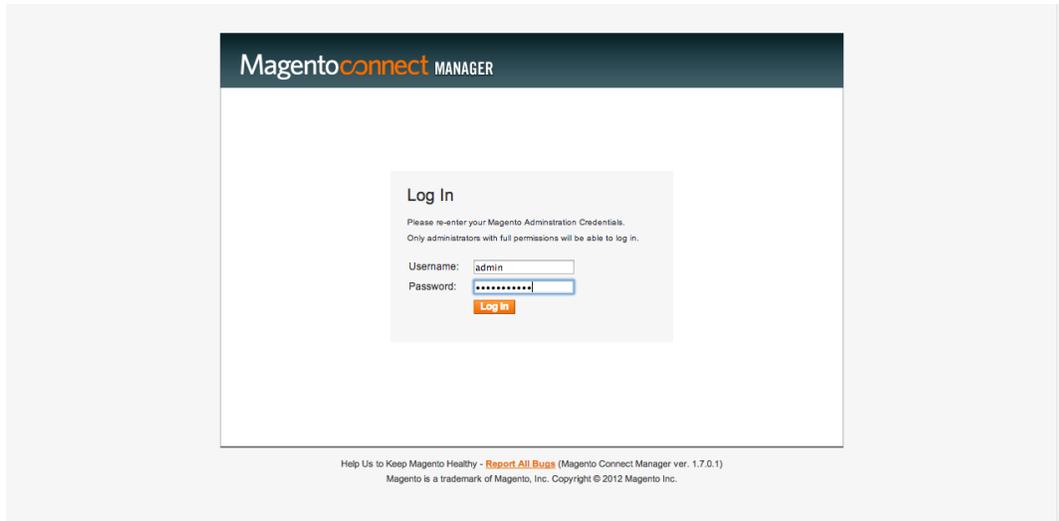
1.1 Installation

Step 1: Installation of Magento core API extension

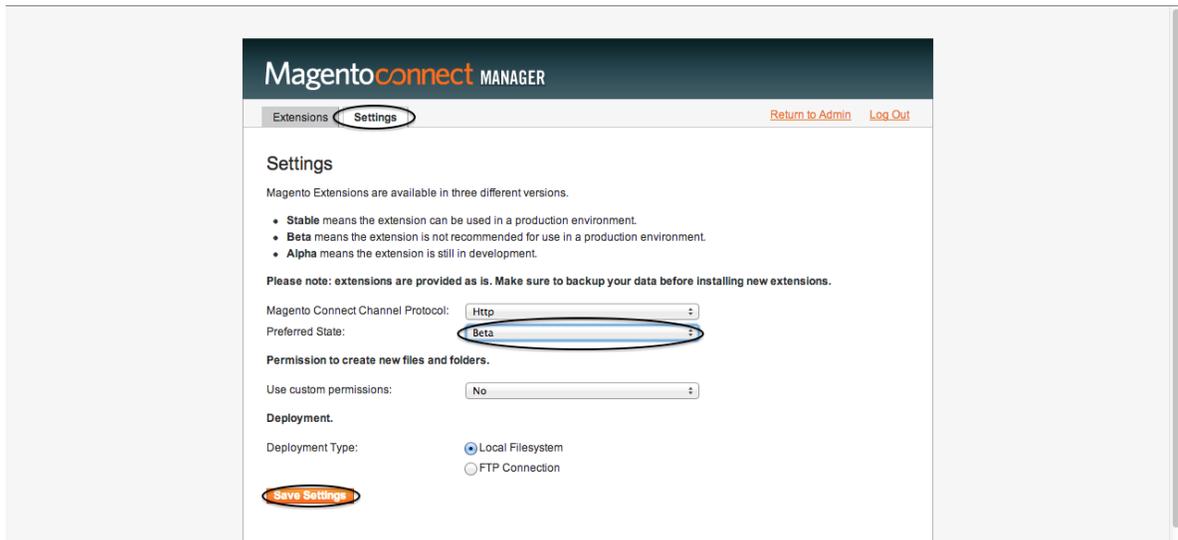
1. After login to magento Admin Panel, go to System >> Magento Connect >> Magento Connect Manager



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

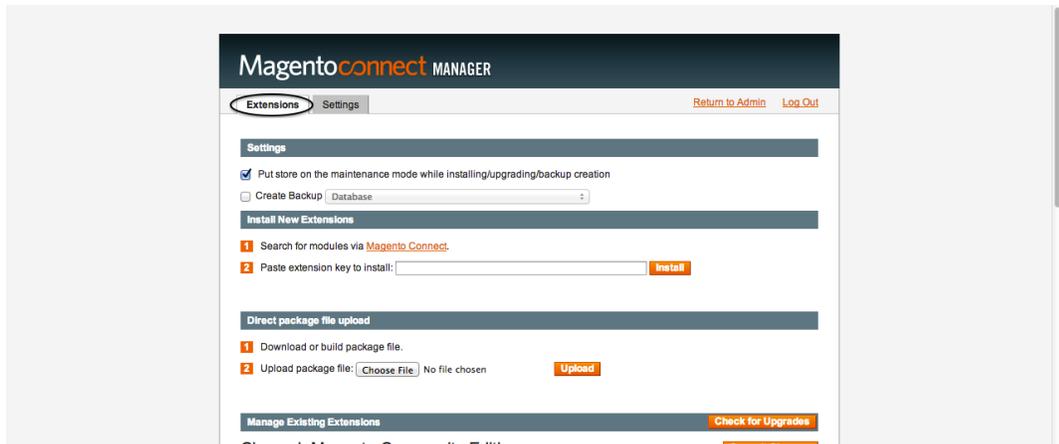


3. Click on the second tab for settings and change preferred state to 'Beta'. (As of this date the plug-in is beta). Save your settings



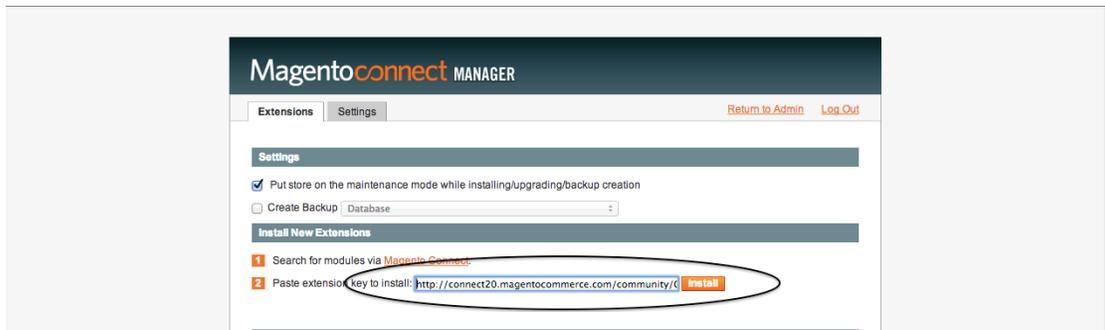
Note: Default state is Stable, change it to Beta.

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

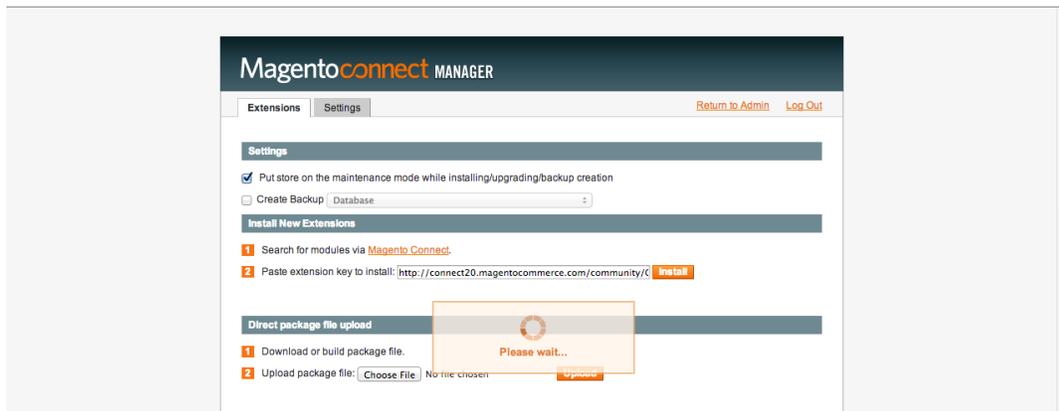


5. You need to paste the following extension key in the box to install:

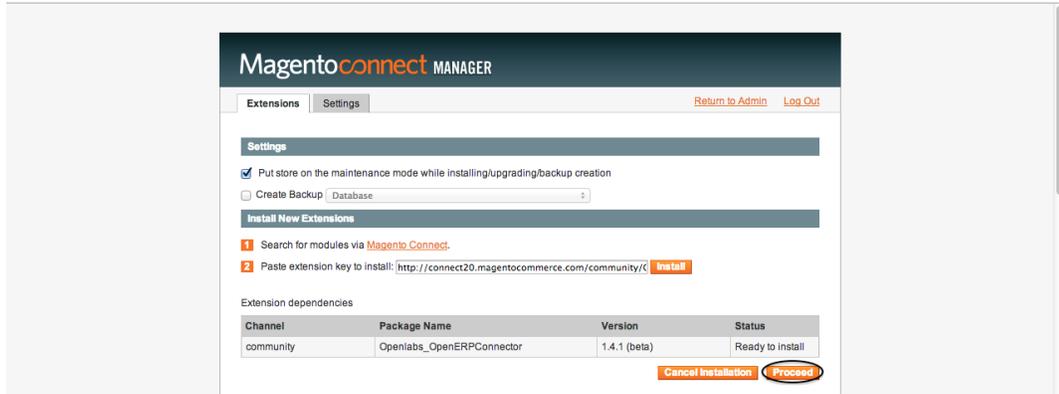
http://connect20.magentocommerce.com/community/Openlabs_OpenERPConnector



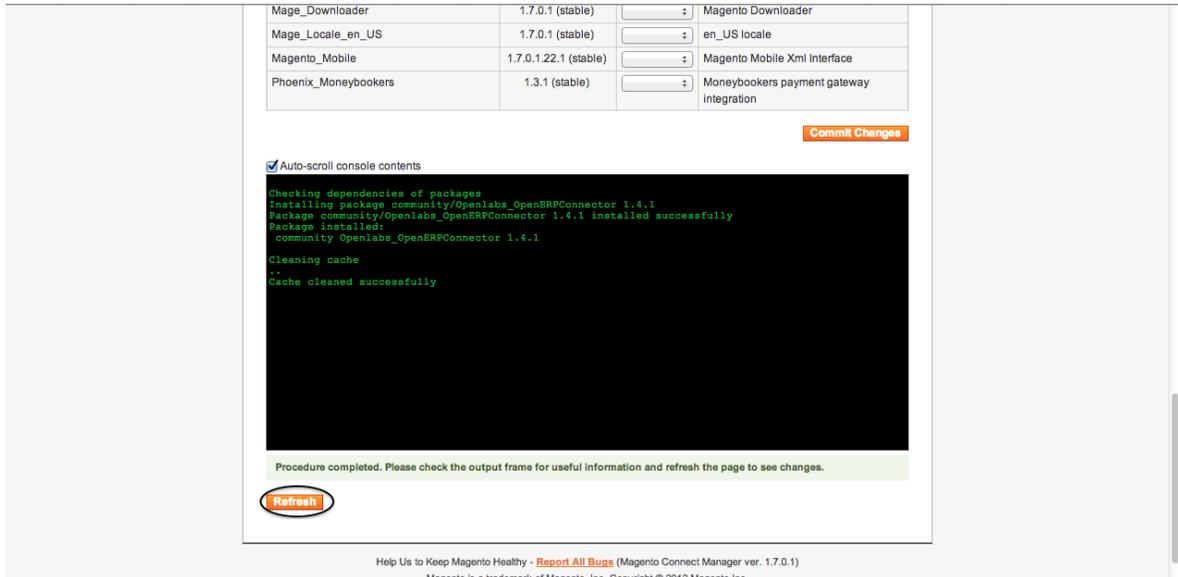
6. Click Install, and wait for the module to be shown for installation



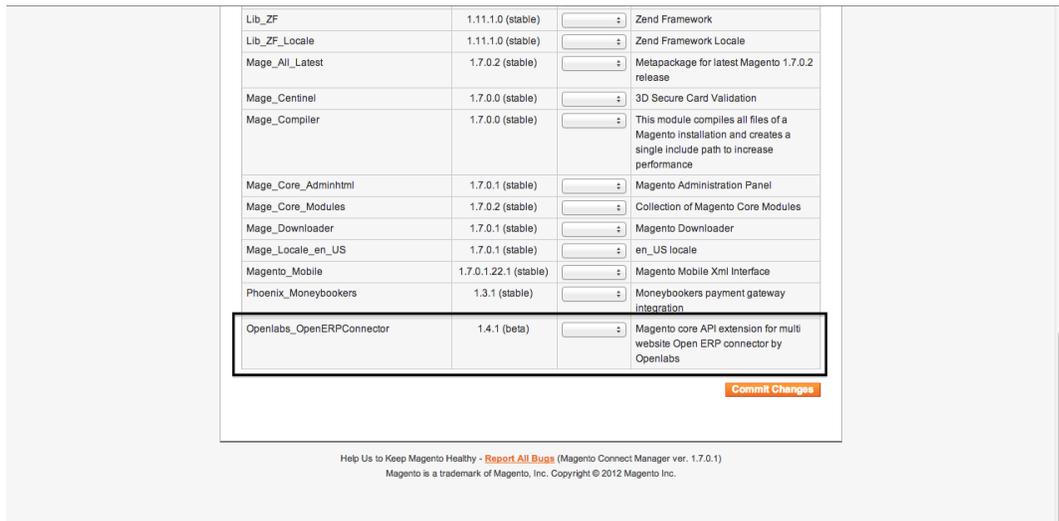
7. Install it by clicking Proceed, refer below screenshot:



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

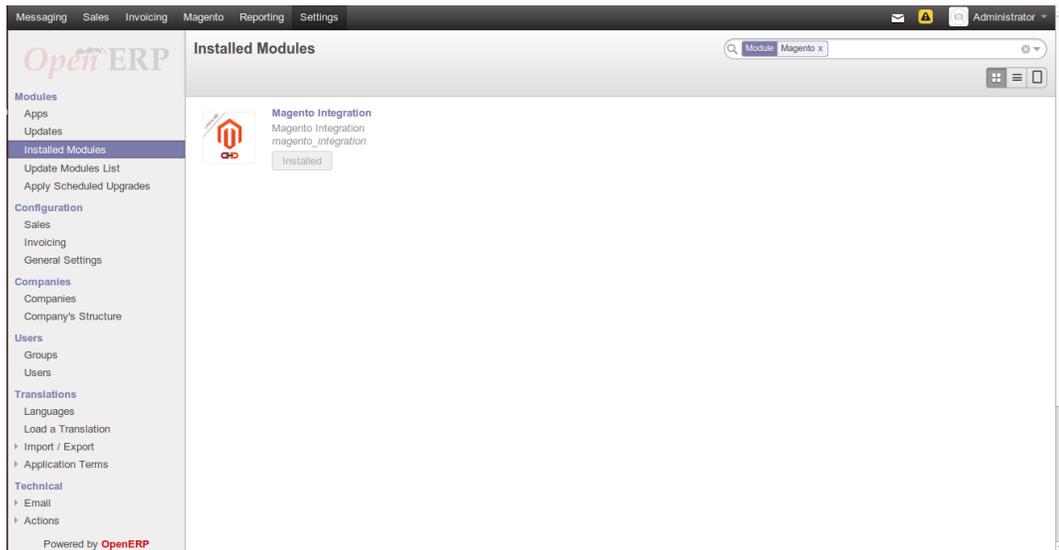
1.1.1 Login to OpenERP

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

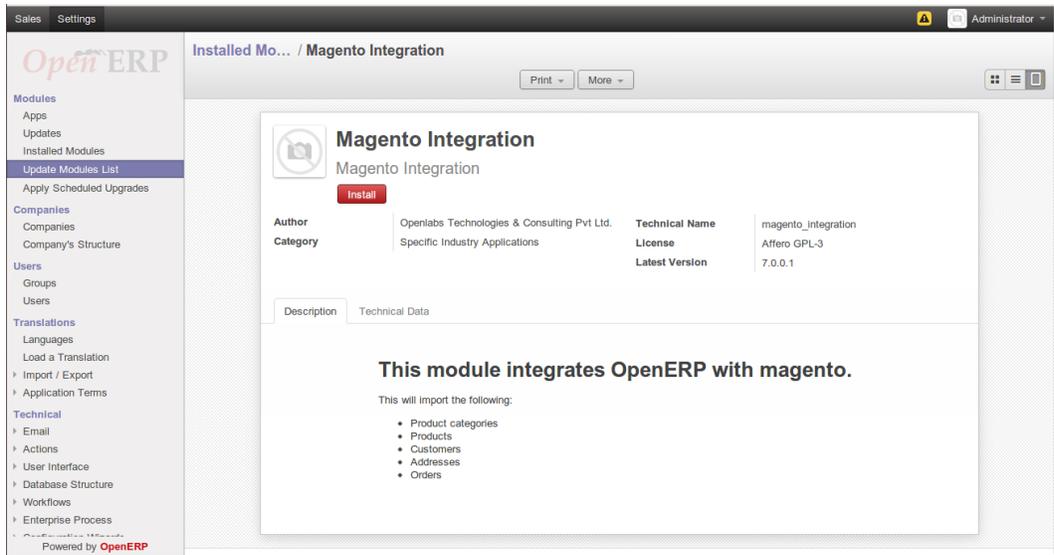
- Username: Ask your administrator for this information
- Password: Ask your administrator for this information



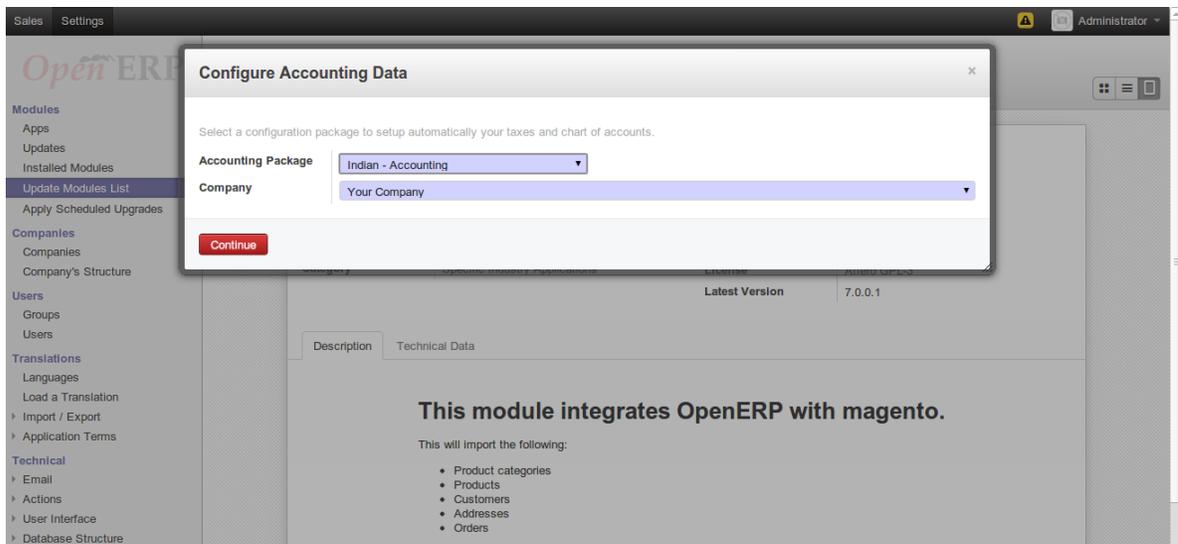
1. Go to Settings, click on *Update Modules List* shown under **Modules**
2. Search for magento module in the search bar at top-right side of the page.
3. Search returns the module named *Magento Integration*, now click on the module to install, refer below screenshot:



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*.

Configuration

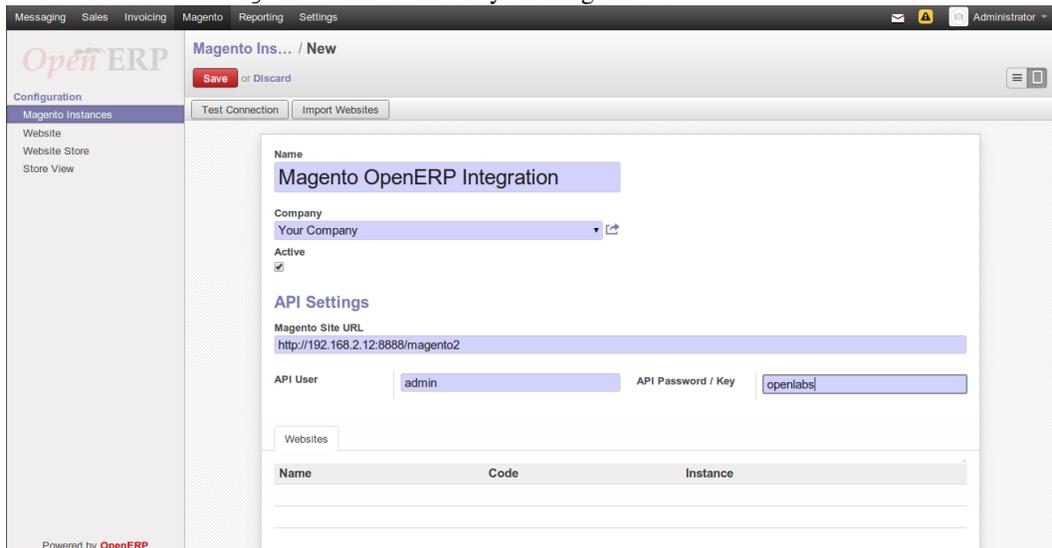
The module requires certain initial configuration to be done in *Magento instance* to set the management tool.

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.

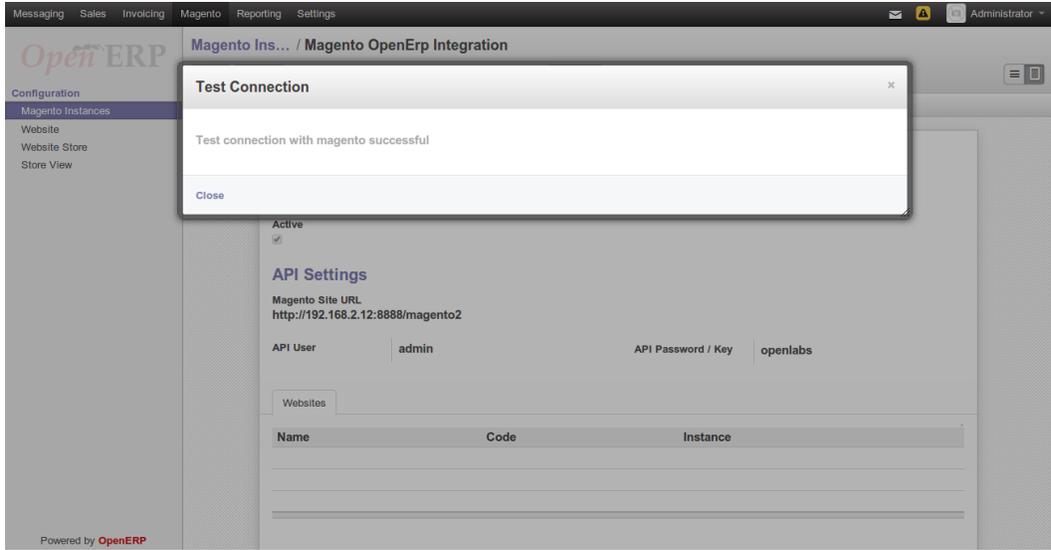


The screenshot shows the OpenERP configuration interface for creating a new Magento instance. The interface is titled "Magento Ins... / New" and includes a "Save" button and a "Discard" button. The "Configuration" section is active, and the "Magento Instances" tab is selected. The "Test Connection" and "Import Websites" buttons are visible. The form fields are as follows:

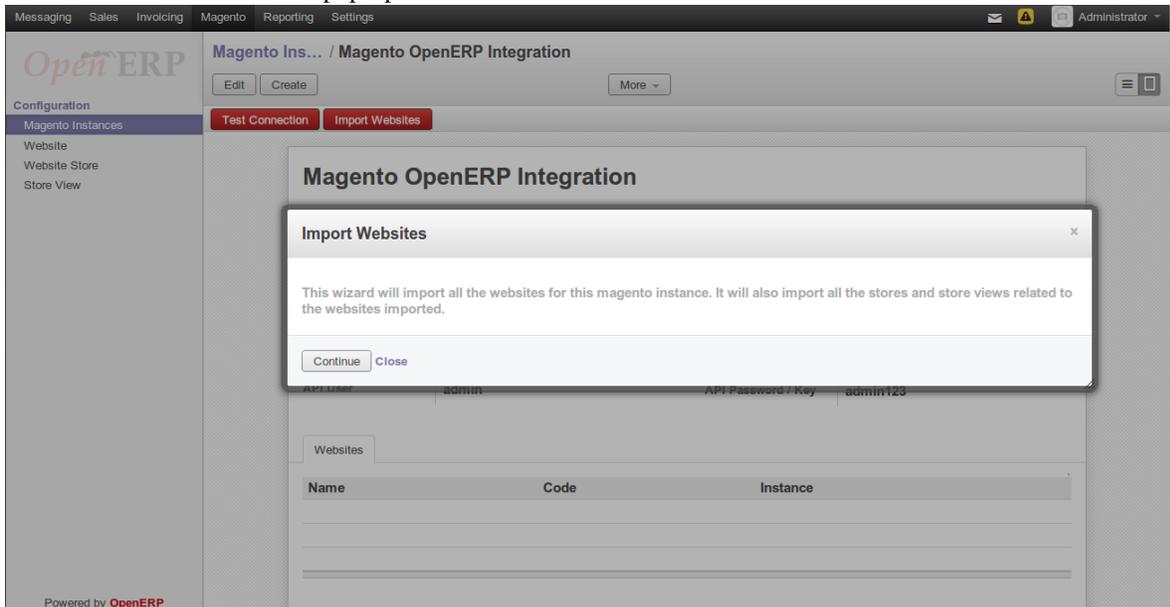
- Name:** Magento OpenERP Integration
- Company:** Your Company
- Active:**
- API Settings:**
 - Magento Site URL:** http://192.168.2.12:8888/magento2
 - API User:** admin
 - API Password / Key:** openlabs
- Websites:** A table with columns for Name, Code, and Instance.

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:



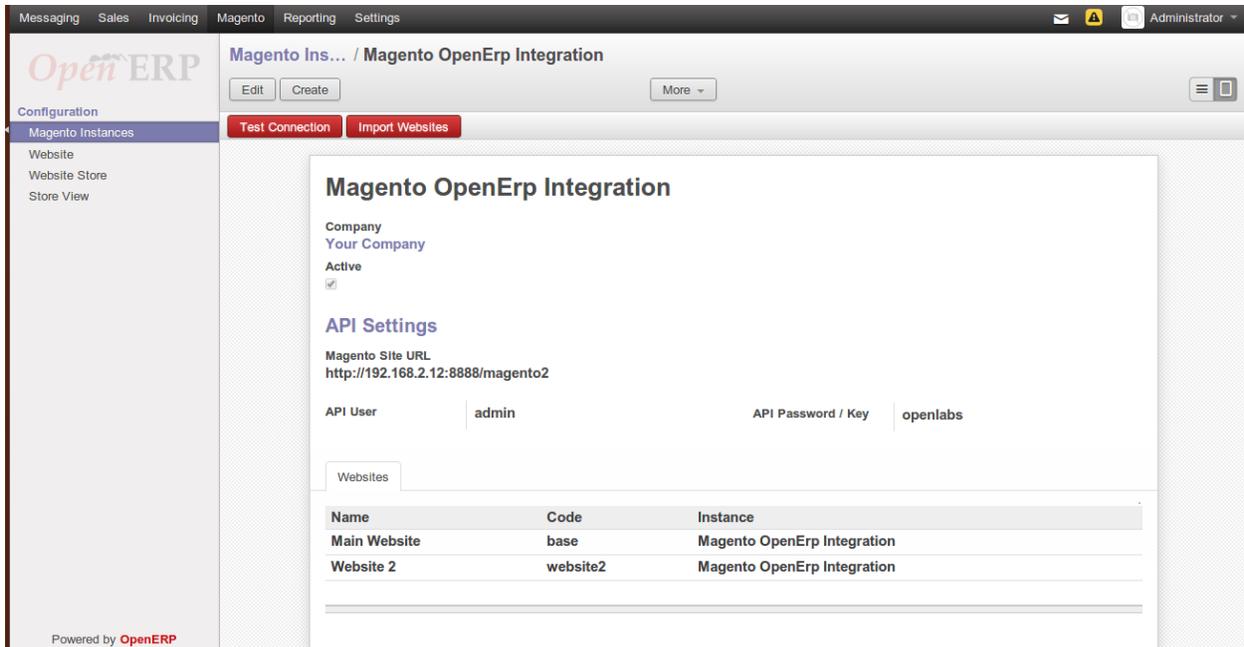
To know more about *Magento Website*, refer [website](#).

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:

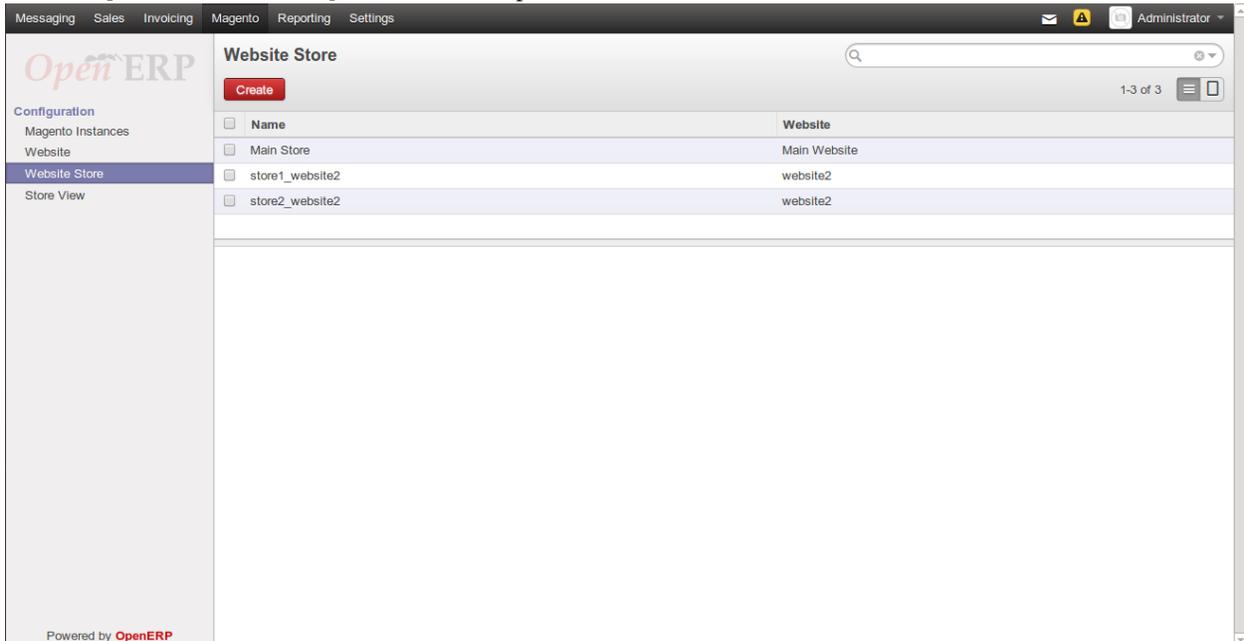


Note: A website must be unique in an magento instance

2.3 Website Store

Magento Website Store or Store view groups

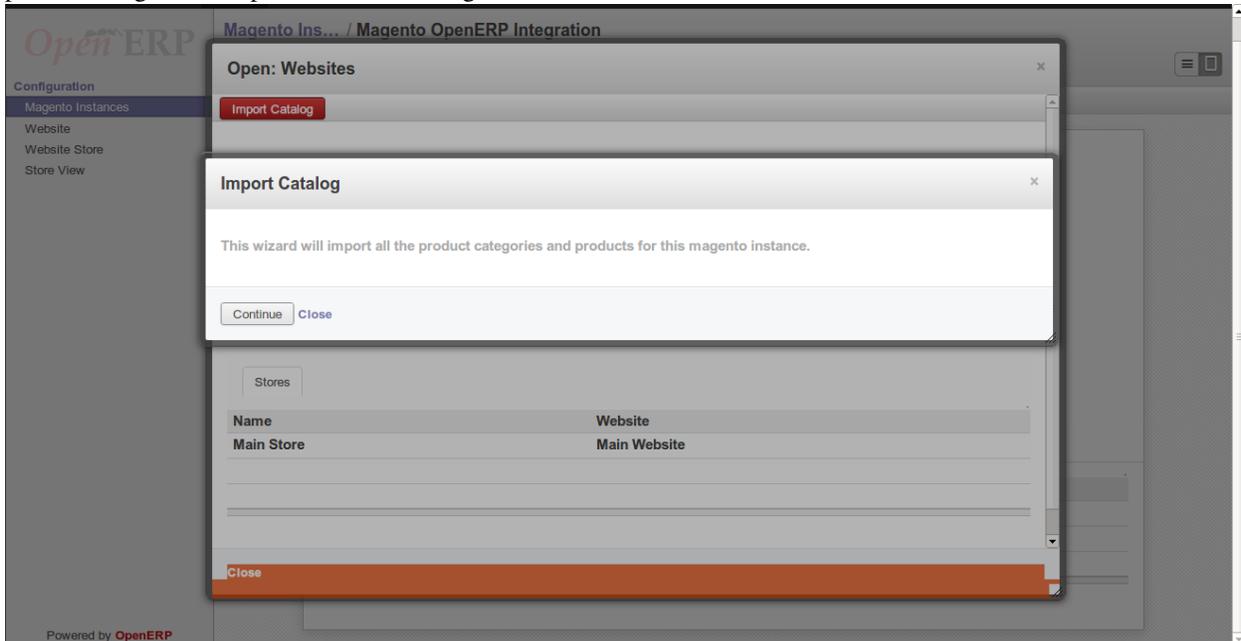
Go to Magento >> Configuration and open *Website Store*.



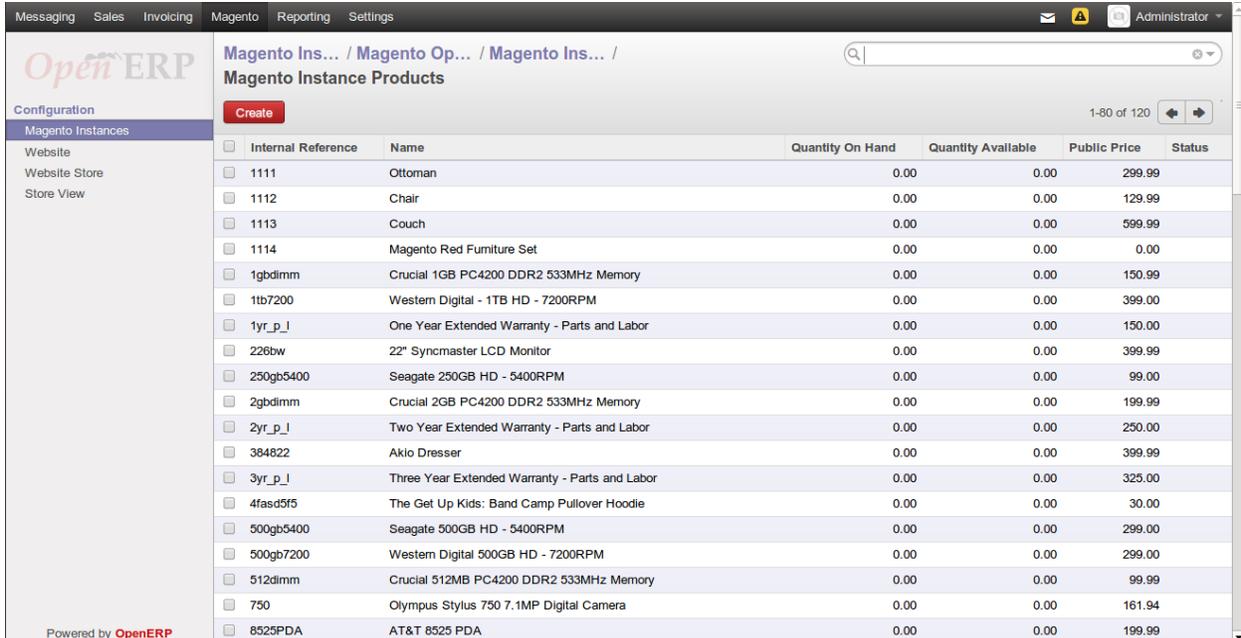
Stores are children of websites. The visibility of products and categories is managed on magento at store level by specifying the root category on a store. The setup for root catalog on stores does not reflect on OpenERP as there is no functional benefit of doing so.

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:



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 shows the Magento Admin interface for the 'Store View' configuration. The top navigation bar includes 'Messaging', 'Sales', 'Invoicing', 'Magento', 'Reporting', and 'Settings'. The user is logged in as 'Administrator'. The left sidebar shows the navigation menu with 'Store View' selected. The main content area displays a table of store views.

<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

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 is 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 regarding cache types, the latest message (Magento CE 1.6.1.0-stable), and indexes. The main content area is titled "Orders" and features a "Create New Order" button. Below this, there are filters for "Select Visible" and "Unselect Visible", and a "0 items selected" indicator. The table below shows two orders:

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	View
100000001	Main Website Main Store English	Jun 22, 2013 4:13:12 PM	Shalabh Aggarwal	Shalabh Aggarwal	\$2,255.00	\$2,255.00	Pending	View

Orders in Magento



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

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions

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

[Back](#) | [Edit](#) | [Cancel](#) | [Send Email](#) | [Hold](#) | [Invoice](#) | [Ship](#)

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**

Billing 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

Account Information

Customer Name: **Shalabh Aggarwal**

Email: sa@openlabs.co.in

Customer Group: **NOT LOGGED IN**

Shipping Address [Edit](#)

Shalabh Aggarwal
street 1
street 2
test city, Delhi, 123456
India
T: 2134567890

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](#)

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
A test monitor SKU: 226bw <i>Manufacturer</i> 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

Grand Total: \$2,255.00

Total Paid: \$0.00

Total Refunded: \$0.00

Total Due: \$2,255.00

[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

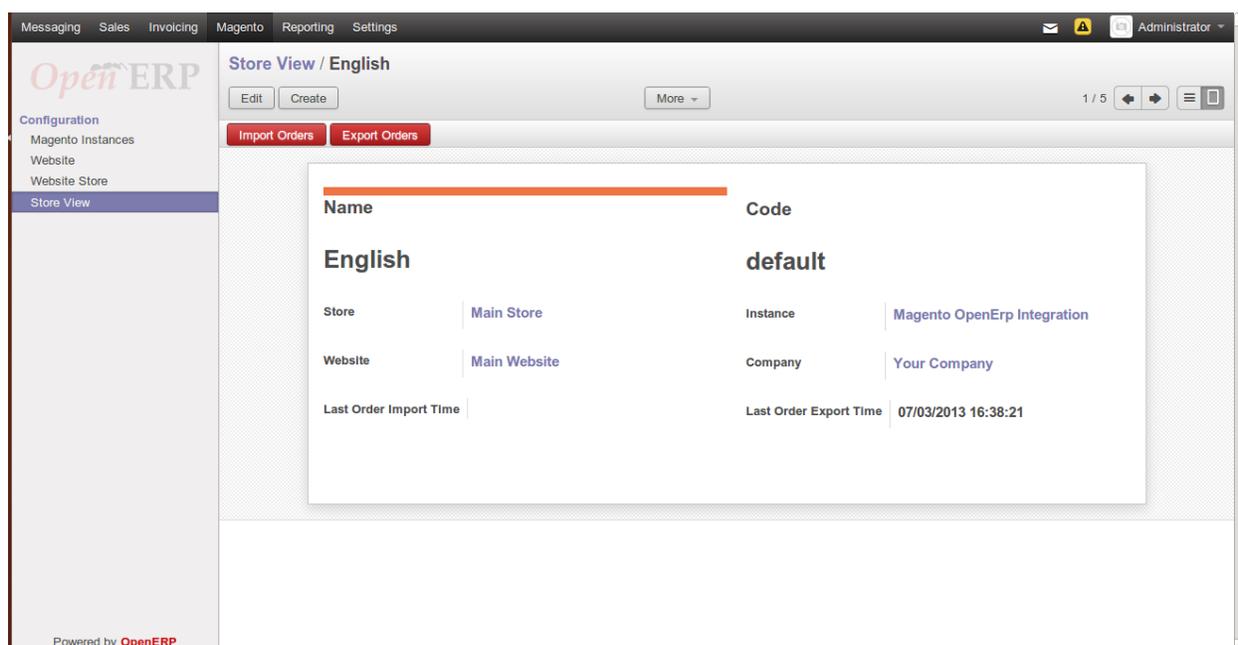
How it Works

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:

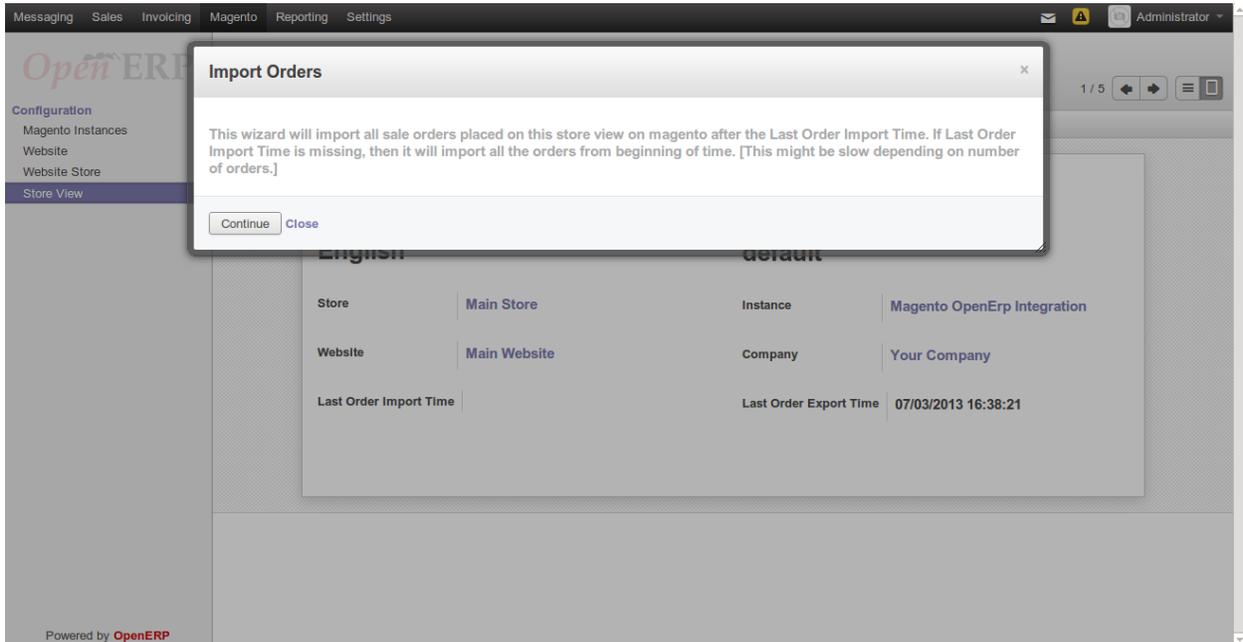


An order in Magento has a number of entities related and they are imported in OpenERP as described below:

- 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 interface for a Sales Order. The top navigation bar includes 'Messaging', 'Sales', 'Invoicing', 'Magento', 'Reporting', and 'Settings'. The 'Sales' menu is highlighted. The main header shows 'Sales Orders / mag_10000001' with 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', and 'Sale to Invoice' (the current state), followed by 'Done'.

The central panel displays the 'Sales Order mag_10000001' details:

- Customer:** Shalabh Aggarwal, street 1, street 2, test city 123456, Delhi, India
- Date:** 06/22/2013
- Shop:** Your Company
- Customer Reference:** (empty)

Below the details, there are tabs for 'Order Lines' and 'Other Information'. The 'Order Lines' tab is active, showing a table with columns: Product, Description, Quantity, Taxes, Unit Price, and Subtotal.

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

Summary of amounts:

- Untaxed Amount : 2255.00 €
- Taxes : 0.00 €
- Total : 2255.00 €**

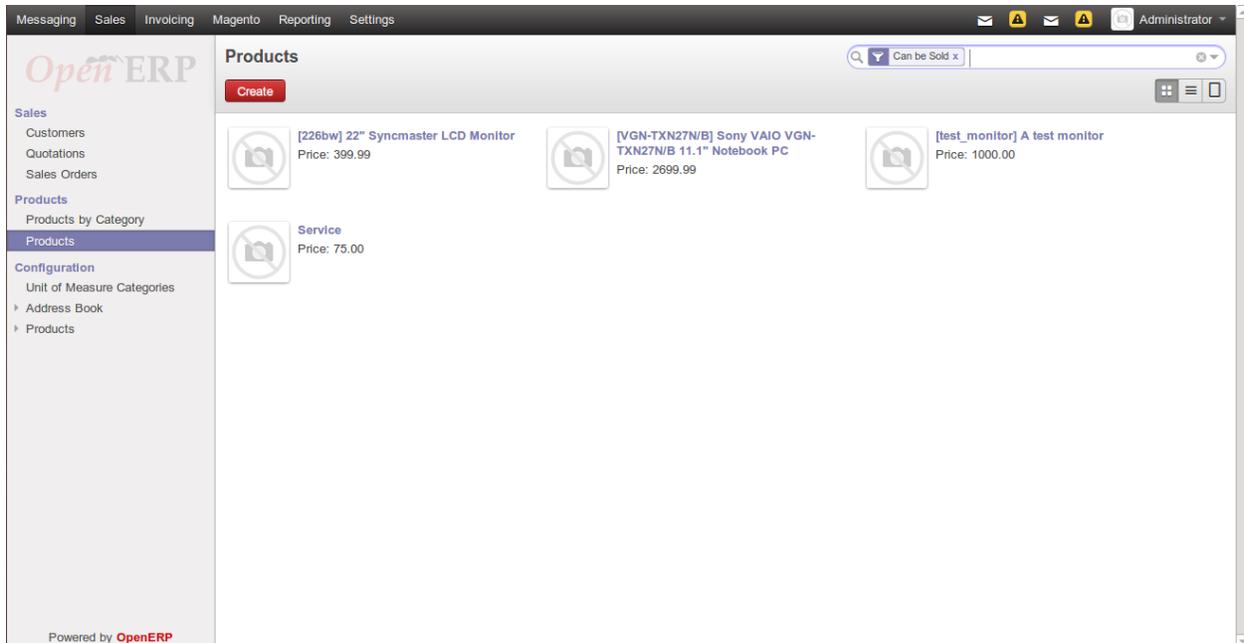
At the bottom, there is a 'Send a message or Log a note' section with two activity items:

- Quotation confirmed:** Customer: Shalabh Aggarwal, Status: Draft Quotation → Sale to Invoice, Untaxed Amount: 2255.0. Administrator updated document about a minute ago.
- Document created:** Administrator updated document about a minute ago.

On the right, there is a 'Following' section with a 'Following' button and a list of items to follow: 'Discussions' (checked), 'Quotation sent' (unchecked), and 'Sales Order Confirmed' (unchecked). Below this, it shows '2 followers' and lists '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.

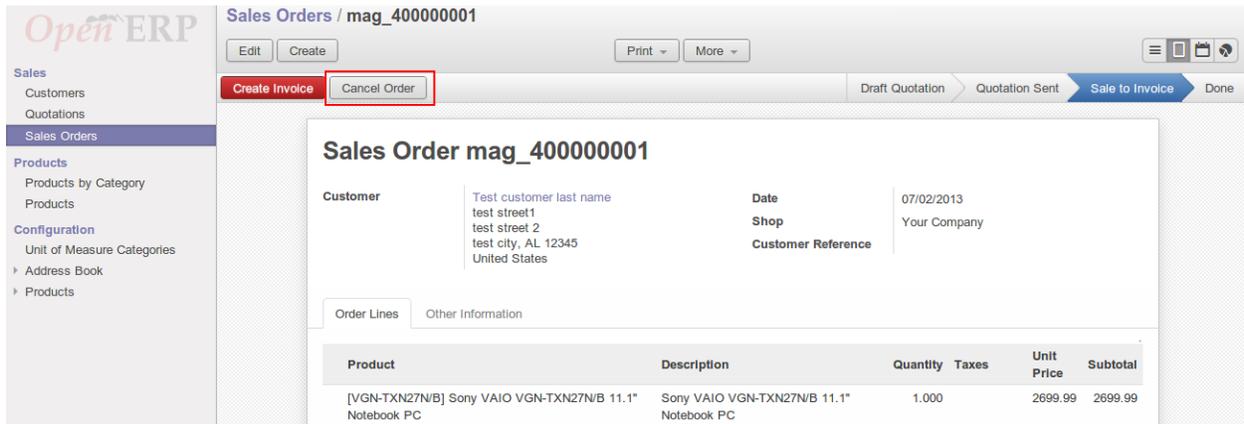
Product in OpenERP



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.

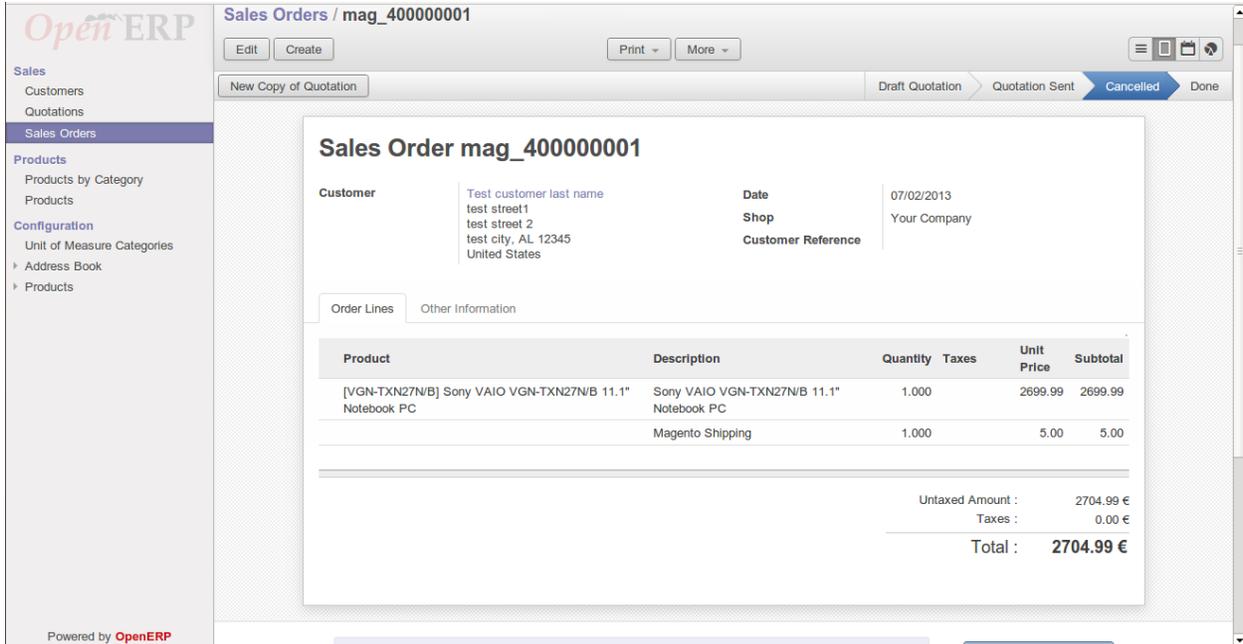
4.2 Cancellation Of Sale Order

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

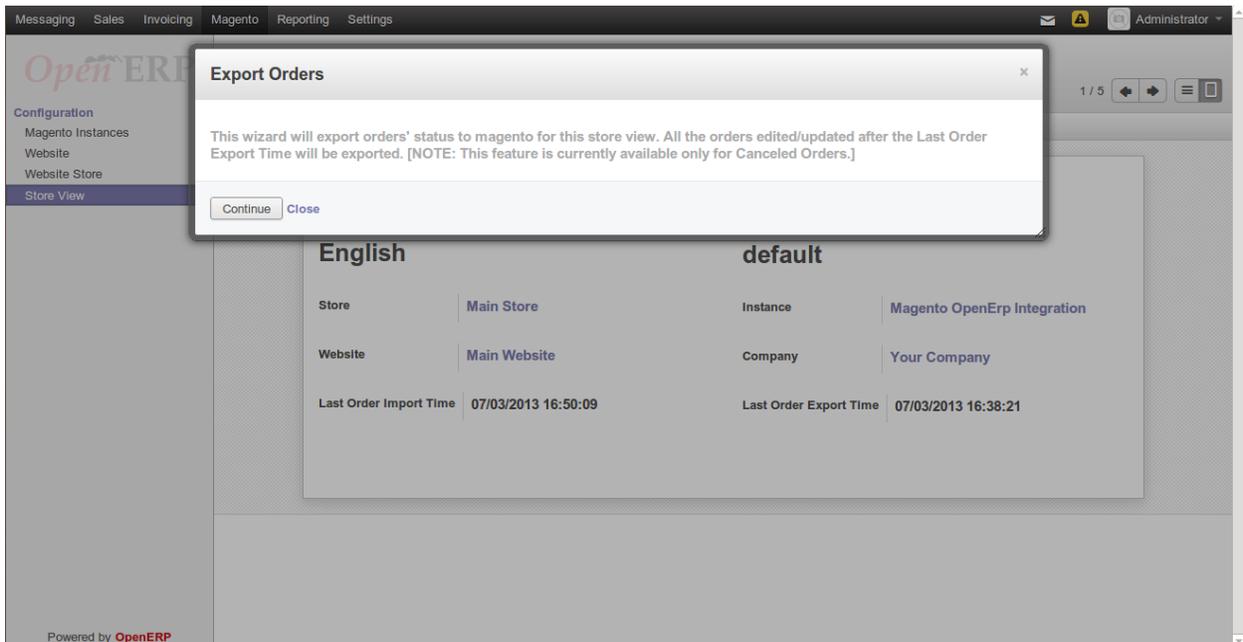
Cancelled Sale Order



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.



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

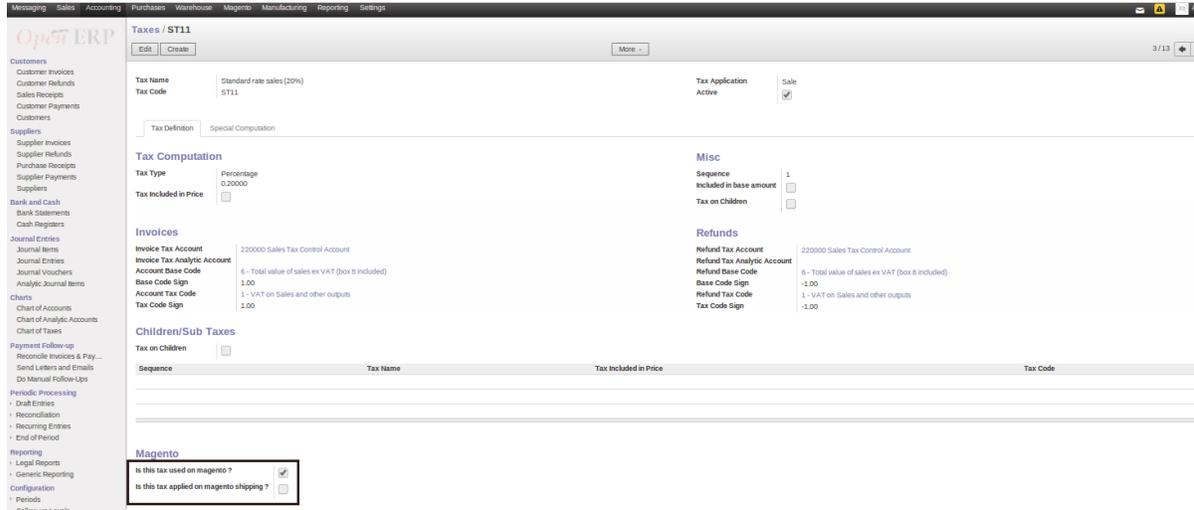
The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with 'Sales' selected. Below it, there are several status messages. The main content area is titled 'Orders' and contains a table of order records. The table has columns for Order #, Purchased From (Store), Purchased On, Bill to Name, Ship to Name, G.T. (Base), G.T. (Purchased), Status, and Action. One order with ID 100000001 is highlighted, and its status is 'Canceled', which is enclosed in a red box. The interface also includes search filters, export options, and a footer with version information and help links.

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	View
100000001	Main Website Main Store English	Jun 22, 2013 4:13:12 PM	Shalabh Aggarwal	Shalabh Aggarwal	\$2,255.00	\$2,255.00	Canceled	View

Note: This feature is currently available for Cancelled Orders

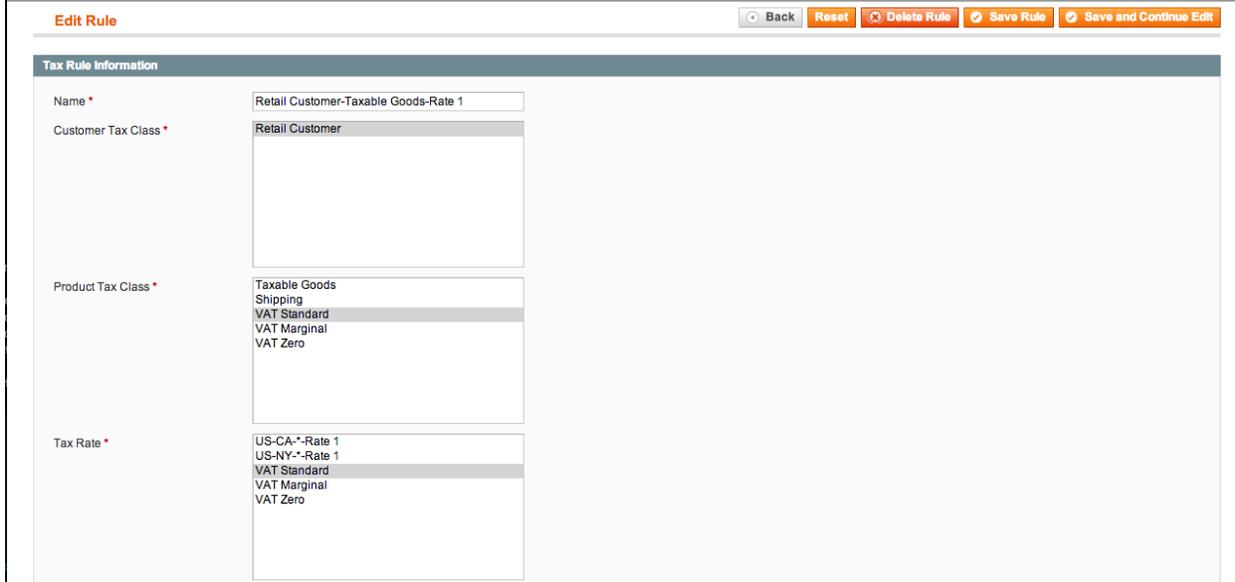
4.4 Handle Taxes When Importing Orders From Magento

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.



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.

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 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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