# Magento OpenERP Integration Documentation

Release 1.0

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

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# Introduction

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

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

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

# 1.1 Installation

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

1. After login to magento Admin Panel, go to

System >> Magento Connect >> Magento Connect Manager

n Magento <sup>-</sup> Admin Panel		Glob	al Record Sea	irch	Logged in as admin   Friday, July 12, 2013   Try Magento Go for Free   Log Out
Dashboard Sales Catalog Mobile Customers Promotio	ons Newsletter	CMS	Reports	System	(9) Get help for this page
Latest Message: Magento CE 1.6.1.0-stable Now Available Read details				My Account	jor, 19 minor and 39 notice unread message(s). Go to messages inbox
One or more of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date: Catalog URL Rewrites, Product Flatence of the Indexes are not up to date; Product Flatence of the Indexes are not up to date; Product Flatence of	at Data, Category Produ	icts, Catalo	g Search Index	Notifications	<u>k Management</u> and rebuild required indexes.
				Tools	A
Dashboard				Web Services	4
				Design	
Choose Store View: All Store Views 💠 😡				Import/Export	4
				Manage Currency	4
l ifatima Salas				Transactional Emails	
	Orders Ar	mounts		Custom Variables	
\$0.00				Permissions	4
				Magento Connect	Select Range: Last 24 Hours ¢
Average Orders				Cache Manage Ma	agento Connect Manager
\$0.00				Index ManagenPa	ackage Extensions
				Manage Stores	
Last 5 Orders				Order Statuses	
Customer Items Grand Total				Configuration	

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

End to the two two two the two	
Help Us to Keep Magento Heathy - Report All Bugs (Magento Connect Manager ver. 1.7.0.1) Magento is a trademark of Magento, Inc. Copyright © 2012 Magento Inc.	

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

Settings Magento Extensions are available in three different versions.   Stable means the extension can be used in a production environment.  Statue means the extension is ot recommended for use in a production environment.  Alpha means the extension is still in development.  Preferred State:  Preferred State:  Deployment Deployment Type:  Conterction  Deployment Type:  Deployment Conterction  Deployment Conter	Extensions Settings	Return to Admin Log Out
Magento Extensions are available in three different versions.	Settings	
<ul> <li>Stable means the extension can be used in a production environment.</li> <li>Beta means the extension is not recommended for use in a production environment.</li> <li>Alpha means the extension is still in development.</li> </ul> Please note: extensions are provided as is. Make sure to backup your data before installing new extensions.   Magenio Connect Channel Protocol:   Http://preferred State:   Perfored State:   Beta   Deployment.   Deployment Type:   Option:	Magento Extensions are available in three different versions.	
Please note: extensions are provided as is. Make sure to backup your data before installing new extensions.         Magento Connect Channel Protocol:         Http:::::::::::::::::::::::::::::::::::	Stable means the extension can be used in a production environment.     Beta means the extension is not recommended for use in a production er     Alpha means the extension is still in development.	nvironment.
Magento Connect Channel Protocol: Http + Preferred State: Beta * Permission to create new files and folders. Use custom permissions: No * Deployment. Deployment Type: OLcal Filesystem OFTP Connection	Please note: extensions are provided as is. Make sure to backup your dat	a before installing new extensions.
Permission to create new files and folders. Use custom permissions:  Deployment.  Deployment Type:  Colocal Filesystem  FTP Connection	Magento Connect Channel Protocol: Http Preferred State: Beta	:
Use custom permissions: No : Deployment. Deployment Type: OLccal Filesystem FTP Connection	Permission to create new files and folders.	
Deployment. Deployment Type: OLcal Filesystem FTP Connection	Use custom permissions: No	\$
Deployment Type: O Local Filesystem	Deployment.	
	Deployment Type:   Local Filesystem  FTP Connection	

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

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

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

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

http://connect20.magentocommerce.com/community/Openlabs\_OpenERPConnector

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

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

sions Settings	Return to Admin	Log Out
Sottings		
Put store on the maintenance mode while installing/upgrading/backup creation		
Create Backup Database :		
Install New Extensions		
1 Search for modules via Magento Connect.		
2 Paste extension key to install: http://connect20.magentocommerce.com/community/C	Install	
Direct package file upload		
Download or build package file.     Please wait		
1 United analysis file ( and a second s		

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

Extensions Se	ttings		Return to Admin	Log Out
Settings				
Put store on the r	naintenance mode while installing/upgrading/bac	kup creation		
Create Backup	Database	\$		
Install New Extens	ions			
Search for module	les via <u>Magento Connect</u> .			
2 Paste extension	key to install: http://connect20.magentocommerc	e.com/community/( Install		
Extension dependen	cies			
Channel	Package Name	Version	Status	
community	Openiabs OpenERPConnector	1.4.1 (beta)	Ready to	install

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

Mage_Downloader	1.7.0.1 (stable)	÷	Magento Downloader	
Mage_Locale_en_US	1.7.0.1 (stable)	\$	en_US locale	
Magento_Mobile	1.7.0.1.22.1 (stable)	:	Magento Mobile Xml Interface	
Phoenix_Moneybookers	1.3.1 (stable)	:	Moneybookers payment gateway	
			integration	
			Commit Changes	
Auto-scroll console contents				
Checking dependencies of packages				
Installing package community/Open Package community/Openlabs OpenE	hlabs_OpenERPConnector	1.4.1 alled succes	fully	
Package installed:			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
Gleaning cache				
Casho alconed evenessionally				
cache creaned successfully				
Procedure completed. Please check the ou	utput frame for useful inform	ation and refres	the page to see changes.	
Refresh				
				1
Help Us to Keep Mage	nto Healthy - Report All Bugs	(Magento Connec	t Manager ver. 1.7.0.1)	
Magento is	a tradamark of Maganto Inc. C	onvright @ 2012 M	aganto Inc	

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

Lib_ZF	1.11.1.0 (stable)	+	Zend Framework
Lib_ZF_Locale	1.11.1.0 (stable)	\$	Zend Framework Locale
Mage_All_Latest	1.7.0.2 (stable)	\$	Metapackage for latest Magento 1.7.0.2 release
Mage_Centinel	1.7.0.0 (stable)	\$	3D Secure Card Validation
Mage_Compiler	1.7.0.0 (stable)	\$	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)	:	Magento Administration Panel
Mage_Core_Modules	1.7.0.2 (stable)	\$	Collection of Magento Core Modules
Mage_Downloader	1.7.0.1 (stable)	\$	Magento Downloader
Mage_Locale_en_US	1.7.0.1 (stable)	:	en_US locale
Magento_Mobile	1.7.0.1.22.1 (stable)	\$	Magento Mobile Xml Interface
Phoenix_Moneybookers	1.3.1 (stable)	\$	Moneybookers payment gateway integration
Openlabs_OpenERPConnector	1.4.1 (beta)	\$	Magento core API extension for multi website Open ERP connector by Openlabs
			Commit Changes

Step 2: Installation of Magento Integration [OpenERP module]

#### **Setup Python environment**

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

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

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

#### Downloading the magento\_integration module

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

git clone https://github.com/openlabs/magento\_integration.git

#### OR

git clone git@github.com:openlabs/magento\_integration.git

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

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

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

python setup.py install

#### Installing the module in OpenERP database

### 1.1.1 Login to OpenERP

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

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

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

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

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

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

Sales Settings	_	_		_		🔺 🔟 Administrator 👻 🔒				
Open ERP	Installed M	o / Mage	nto Integration	_						
Modules			Print *							
Apps										
Updates Installed Modules			Magento Integration							
Update Modules List		N	Magento Integration							
Apply Scheduled Upgrades			Install							
Companies		Author	Openlabs Technologies & Consulting Pvt Ltd. Specific Industry Applications	Technical Name	magento_integration					
Users Groups			opeone madely Approaters	Latest Version	7.0.0.1					
Users		Description	Technical Data							
Translations		Description	Technical Data							
Longuages										
Import / Export			This module integrates C	penERP wit	th magento.					
Application Terms			This will import the following:							
Technical			Product categories							
Email			<ul> <li>Products</li> </ul>							
Actions			Customers     Addresses							
User Interface     Detebase Structure			Orders							
Workflows										
Enterprise Process										
Powered by OpenERP										

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

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

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

# Configuration

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

### 2.1 Magento Instance

Go to Magento >> Configuration and open Magento Instances.

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

1. Create a new magento instance by clicking create.

messaging buies involoning	indgento reporting octaings			😐 😐 🕙 🗥	anningtrat				
Opéñ ERP	Magento Ins / New Save or Discard								
Configuration									
Magento Instances	Test Connection Import Websites								
Website									
Website Store	Name								
Store View	Magento OpenER	Magento OpenERP Integration							
	Company								
	Your Company	• 🗠							
	Active								
	API Settings								
	Magento Site URL								
	http://192.168.2.12:8888/magen	to2							
	API User admin		API Password / Key	openlabs					
				ekernepel					
	Wahaitaa								
	Websites								
	Name	Code	Instance						
Powered by OpenERP									

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

Messaging Sales Invoicing	Magento Repo	orting Settings			⊻	🔺 🔟 Administrator 👻 🔶
Onen FRP	Magento I	ns / Magento O	penErp Integration			
Configuration	Test Con	nection			×	
Website Website Store Store View	Test conne	ction with magento su	ccessful			
	Close					
		Active	888/magento2 admin	API Password / Key	openiabs	
Powered by OpenERP			Code	instance		_

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

Messaging Sales Invoicing	Magento Report	ting Settings			× × × × × × × × × × × × × × × × × × ×	Administrator	
Open ERP	Magento In Edit Creat	s… / Magento Ope	enERP Integration	More +			ו
Magento Instances	Test Connection	on Import Websites					
Website							
Website Store		Magento Op	enERP Integra	ation			
Store view		• 1					
		Import Websites				×	
		This wizard will impor the websites imported	rt all the websites for thi d.	s magento instance.	s related to	=	
		Continue Close					
		API User	admin		API Password / Key admin123		
		Websites					
		Name	Code		Instance		
Powered by OpenERP							
		Name	Code		Instance		
Powered by OpenERP							

To know more about Magento Website, refer website.

### 2.2 Magento Website

Go to Magento >> Configuration and open Website.

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

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

Messaging Sales Invoicing	Magento Repor	ting Settings				🖂 🖪	Administrator 👻		
Onon FRP	Magento Ir	Magento Ins / Magento OpenErp Integration							
Open Lixi	Edit Crea	ate		More 👻					
Configuration Magento Instances	Test Connect	ion Import Websites							
Website Website Store Store View		Magento O	penErp Integ	gration					
		Company Your Company							
		Active							
		API Settings							
		Magento Site URL http://192.168.2.12:8	888/magento2						
		API User	admin		API Password / Key	openlabs			
		Websites							
		Name	Code	Ins	tance				
		Main Website	base	Ma	gento OpenErp Integration	n			
		Website 2	website	ez Ma	gento OpenErp Integration	1			
Powered by OpenERP									

Note: A website must be unique in an magento instance

### 2.3 Website Store

Magento Website Store or Store view groups

Go to Magento >> Configuration and open Website Store.

Messaging Sales Invoicing	Magento Reporting Settings	🖂 🧕 🧕 Administrator 👻
Onen FRP	Website Store	Q ( )
	Create	1-3 of 3 📃 🗌
Configuration Magento Instances	Name	Website
Website	Main Store	Main Website
Website Store	store1_website2	website2
Store View	store2_website2	website2
Powered by OpenERP		_
		1*

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

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

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

	Magento Ins / Magento OpenERP Integrat	_		
	Open: Websites		×	
Configuration				
Website	Import Catalog			
Website Store			-1	
Store view	Import Catalog		×	
	This wizard will import all the product categories and	products for this magento instance.	п	
			-8	
	Continue Close			
				-
	Stores			
	Name	Website		
	Main Store	Main Website	- 14	
	l		- 11	
			- 18	
	Close			
Powered by OpenERP				v

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

Messaging Sales Invoicing	Magento Reporting Setti	ngs			Administra	ator 👻
Opéñ ERP	Magento Ins / Ma Magento Instance	agento Op… / Magento Ins… / Products	Q			07
Configuration	Create				1-80 of 120 🔶	•
Magento Instances	Internal Reference	Nama	Quantity On Hand	Quantity Available	Bublic Brice Sta	
Website		Ottemen	Quality Of Hallu		200.00	itus
Store View		Oktoman	0.00	0.00	299.99	
	1112	Chair	0.00	0.00	129.99	
	1113	Couch Maganta Bad Fumiture Sat	0.00	0.00	0.00	
	1114 4 abdimm	Magento Red Furniture Set	0.00	0.00	0.00	
			0.00	0.00	150.99	
	110/200	Western Digital - 11B HD - 7200RPM	0.00	0.00	399.00	
	1yr_p_1	One Year Extended warranty - Parts and Labor	0.00	0.00	150.00	
	226DW	22" Syncmaster LCD Monitor	0.00	0.00	399.99	
	250gb5400	Seagate 250GB HD - 5400RPM	0.00	0.00	99.00	
	2gbdimm	Crucial 2GB PC4200 DDR2 533MHz Memory	0.00	0.00	199.99	
	2yr_p_1	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	
	512dimm	Crucial 512MB PC4200 DDR2 533MHz Memory	0.00	0.00	99.99	
	750	Olympus Stylus 750 7.1MP Digital Camera	0.00	0.00	161.94	
Powered by OpenERP	8525PDA	AT&T 8525 PDA	0.00	0.00	199.99	

Note: Each product in a website must be unique!

# 2.4 Store View

Magento Website Store View

Go to Magento >> Configuration and open Store View.

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

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

Messaging Sales Invoicing	Magento Reporting Settings			🔘 Administrator 👻
OnethERP	Store View	(	٩	8 -
Open EKI	Create			1-5 of 5 📃 🗌
Configuration Magento Instances	Name	Code	Store	
Website	English	default	Main Store	
Website Store	French	french	Main Store	
Store View	🔲 German	german	Main Store	
	English	storeview2	Store 2	
	English	store21	Store21	
Powered by OpenERP				

# **Create Sale Orders in Magento**

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

		- anoi														
Dasht	board Sales	Catalog	Mobile			otions N	Newsletter CMS	Reports	System					0		
() 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.																
Orders     Orders																
Page 1 of 1 pages   View 20 v per page   Total 2 records found   New Order RSS Rest Filter Search																
Select Vable   Unselect Vable   0 Izers selected Actions									Submit							
	Order #	Purchased From	(Store)		Purchase	d On 🕴	Bill to Name		Ship to Name		G.T. (B	ise)	G.T. (Pu	irchased)	Status	Action
Any 🔻				T	From: 📰						From:		From:		•	
					To: 📻						To :		To :			
	40000001	Website 2			Jul 2, 2013	3:03:34	Test customer last	name	Test customer last	name		\$2,704.99		\$2,704.99	Pending	View
		Store 2 English			PM											
	10000001	Main Website			Jun 22, 20	13 4:13:12	Shalabh Aggarwa	1	Shalabh Aggarwal			\$2,255.00		\$2,255.00	Pending	View
		Main Store			PM											
		English														

**Orders in Magento** 

n Magento <sup>-</sup> Admin Panel	I	Global R	ecord Search	Logged in as admin   Wednese	lay, July 3, 2013   <u>Try Magento Go for Free</u>   <u>Log Out</u>
Dashboard Sales Catalog	Mobile Customers Promotic	ns Newsletter CMS Rep	orts System		③ Get help for this page
One or more of the Cache Types are in	validated: Blocks HTML output. Click here	to go to <u>Cache Management</u> and refresh c	ache types.		
Latest Message: Magento CE 1.6.1.0-sta	able Now Available Read details			You have 1 critical, 4 major, 19 minor ar	d 39 notice unread message(s). Go to messages inbox
One or more of the Indexes are not up	to date: Catalog URL Rewrites, Product Fla	t Data, Category Products, Catalog Searc	h Index, Stock Status	. Click here to go to Index Management and rebu	ild required indexes.
Order View	를 Order # 100000001   Jun	22, 2013 4:13:12 PM		Back Edit Cancel	Send Email Hold <u>「</u> Invoice <u>「</u> Ship
Information	0-1			A	
Invoices	Order # 10000001 (the order co	onirmation email was sent)		Account Information	
Credit Memos	Order Date	Jun 22, 2013 4:13:12 PM		Customer Name	Shalabh Aggarwal
Snipments	Order Status	Pending		Email	<u>sa@openlabs.co.in</u>
Transactions	Purchased From	Main Website Main Store English		Customer Group	NOT LOGGED IN
	Placed from IP	127.0.0.1			
	Billing Address		Edit	Shipping Address	Edit
	Shalabh Aggarwal			Shalabh Aggarwal	
	street 1 street 2			street 1 street 2	
	test city, Delhi, 123456			test city, Delhi, 123456	
	India T: 2134567890			India T: 2134567890	
	Payment Information			Shipping & Handling Information	
	Check / Money order Order was placed using USD			Flat Rate - Fixed \$5.00	
🖶 Order # 100000001   Jun 22, 2	2013 4:13:12 PM			Back Edit Cancel	Send Email Hold 🗾 Invoice 📃 Ship
	items Ordered				
	Product A test monitor	Item Status	\$2 250 00	ice Qty Subtotal Tax Am	ount Tax Percent Discount Amount Row Total
	SKU: 226bw	Charles	φ2,200.00 φ2		0.00 0.00 02,200.00
	Manufacturer Samsung				
	Comments History			Order Totals	
	Add Order Comments				Subtotal \$2,250.00
	Pending V				Shipping & Handling \$5.00
	Comment				Grand Total \$2,255.00
					Total Paid \$0.00
					Total Due \$2,255.00
			1		
	Visible on Frontend	Subm	it Comment		
	Jun 22, 2013 4:13:12 PM   F	Pending			
	Customer Notified 🖋				
Help Us Keep Magento Healthy - Report All E Interface Locale: English (United States)	<mark>Bugs</mark> /English ▼	Magento ver. 1.	7.0.2		Connect with the Magento Community Magento™ is a trademark of Magento Inc.
					Copyright © 2013 Magento Inc.
<pre>[profiler] Memory usage: real: 26214400. email()</pre>	oc: 25871984				
Code Profiler Time Cnt Emalloc RealMem					

### How it Works

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

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

### 4.1 Orders are imported as Sales

Messaging Sales Invoicing I	Magento Repo	rting Settings		_		🖂 🙆 A	dministrator 👻		
<i>Opéñ</i> `ERP	Store View	/ English		More -	1/5 🔶 🔿 🔳				
Configuration Magento Instances Website	Import Orders	Export Orders							
Store View		Name			Code				
	English			default					
		Store	Main Store		Instance	Magento OpenErp Integration			
		Website	Main Website		Company	Your Company			
		Last Order Import Time			Last Order Export Time	07/03/2013 16:38:21			
Powered by OpenERP							v		

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

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

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

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

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

Messaging Sales Invoicing	Magento Repo	orting Settings			🖂 🙆 Administrat	tor 👻 🔶				
<b>Opéñ</b> `ERF	Import Orde	ers			× 1/5 • • =					
Configuration Magento Instances Website Website Store Store View	This wizard w Import Time is of orders.]	his wizard will import all sale orders placed on this store view on magento after the Last Order Import Time. If Last Order nport Time is missing, then it will import all the orders from beginning of time. [This might be slow depending on number f orders.]								
	Continue	ose		0013110						
		Lightin		ucruit						
		Store	Main Store	Instance	Magento OpenErp Integration					
		Website	Main Website	Company	Your Company					
		Last Order Import Time		Last Order Export Time	07/03/2013 16:38:21					
Powered by OpenERP						-				

### Order imported as Sales in OpenERP

Sales >> Sales Orders

Messaging Sales Invoicing	Magento Repo	rting Settings	_	_	-	-	2	a 🔺 间 A	Administrator 👻
	Sales Orde	ers / mag_100000	001						
Open EKP	Edit Crea	ate		Print - More -				=	
Sales	Create Inveier	Canaal Ordar			Dro	off Quatation	Quatation Sont	Colo to Invo	Dana
Customers Quotations	Create Invoice	Cancer Order			Dia		Quotation Sent	Sale to myc	Done Done
Sales Orders		Salaa Orda	r mag 10000	0004					
Products		Sales Orde	r mag_10000	10001					
Products by Category Products		Customer	Shalabh Aggarwal	D	Date	06/22/2013			
Configuration			street 1 street 2	s	Shop	Your Compa	ny		
Unit of Measure Categories			Delhi	c	Customer Reference				
Products			India						
		Order Lines Othe	er Information						
		Product		Description	Quantity	Taxes	Unit Price	Subtotal	
		[test_monitor] A te		A test monitor	1.000	0	2250.00	2250.00	
		[2200w] 22 09101		Magento Shipping	1.000	0	5.00	5.00	
						Untaxe	d Amount :	2255.00 €	
							Taxes :	0.00 €	
							Total :	2255.00 €	
	-								
			Send a	message or Log a note			Followi	ng	
		Quotation co	onfirmed			A 0.	Discussions		
		Custom     Status:	er: Shalabh Aggarwal Draft Quotation → Sale to	Invoice			Quotation se           Sales Order	nt Confirmed	
		Untaxee     Administrator	I Amount: 2255.0 pdated document - about a min	ute ago + like			2 followers	Add others	
		Document c	reated			A 12	Administr	rator X	
		Administrator u	pdated document - about a min	ute ago - like			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

Messaging Sales Involcing	Magento Reporting Settings	🖂 🔺 🖂 间 Administrator 👻
<b>Opéñ</b> `ERP	Products	C T Can be Sold x
Sales Customers Quotations Sales Orders Products	[226bw] 22" Syncmaster LCD Monitor Price: 399.99 Price: 2699.99	VGN- Price: 1000.00
Products by Category Products Configuration Unit of Measure Categories > Address Book	Service Price: 75.00	
Products		
Powered by OpenERP		F

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:

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

Now state has been changed to cancelled, see below

**Cancelled Sale Order** 

Onoth FRP	Sales Orde	rs / mag_40	0000001					-
Open LIM	Edit Creat	е	Print	- More -				
Sales Customers	New Copy of Q	uotation			Draft Quotation	Quotation Sen	t Cancelled I	Done
Sales Orders Products Products Products Configuration Unit of Measure Categories Address Book		Sales O	rder mag_400000001 Test customer last name test street1 test street 2 test city, AL 12345 United States	Date Shop Customer Reference	07/02/2013 Your Company			
Products		Order Lines Product	Other Information	Description	Quantity Taxes	Unit Price	Subtotal	
		[VGN-TXN2 Notebook P	27N/B] Sony VAIO VGN-TXN27N/B 11.1" C	Sony VAIO VGN-TXN27N/B 11.1" Notebook PC	1.000	2699.99	2699.99	
				Magento Shipping	1.000	5.00	5.00	
					Untaxed An T	nount : 'axes : otal : 27	2704.99 € 0.00 € 04.99 €	
Powered by <b>OpenERP</b>								

Now to export the changes to Magento, refer export order

# 4.3 Exporting Order Status from OpenERP to Magento

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

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

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**

👘 M	Nagento <sup>-</sup>	Admin Panel		Global F	Record Search	Logged in as admin   V	Vednesday, Ju	uly 3, 2013   <u>Try Mager</u>	to Go for Fre	e   <u>Log Out</u>
Dash	board Sale	s Catalog Mobile Cusi		Newsletter CMS Re	ports System					
🕕 One	One or more of the Cache Types are invalidated: Blocks HTML output. Click here to go to Cache Management and refresh cache types.									
Lates	st Message: Mag	ento CE 1.6.1.0-stable Now Available Re	ad details		You ha	ave <b>1 critical</b> , 4 major, 19 r	minor and 39 n	otice unread message(s	). <u>Go to mess</u>	ages inbox
🕕 One	or more of the li	ndexes are not up to date: Catalog UR	L Rewrites, Product Flat Data, C	ategory Products, Catalog Sear	ch Index, Stock Status. Click here to g	go to <u>Index Management</u> a	and rebuild req	uired indexes.		
📑 Ord	Create New Order									
Page 🕢	1 🕒 of 1	pages   View 20 Ver per page	Total 2 records found	New Order RSS		Export to: CSV	•	Export Re	set Filter	Search
Select V	/isible   Unsele	ct Visible   0 items selected	Durahanal Or	Dill to Mana	Chie to Name	0.7.4	Act	OT (Durshaved)	•	lubmit
	Order #	Purchased From (Store)	From:	biii to Name	Ship to Name	G.I. (I		G.I. (Purchased)	Status	Action
Any •						To:	•	To:	•	
	40000001	Website 2 Store 2 English	Jul 2, 2013 3:03:34 PM	l est customer last name	l est customer last nar	ne	\$2,704.99	\$2,704.99	Pending	View
	10000001	Main Website Main Store	Jun 22, 2013 4:13:12 PM	Shalabh Aggarwal	Shalabh Aggarwal		\$2,255.00	\$2,255.00	Canceled	<u>View</u>
Help Us Interface	Keep Magento H Locale: Englis	ealthy - Report All Bugs h (United States) / English V		Magento ver. 1	.7.0.2			Connect with Magento™ is a tra Copyri	t <mark>he Magento (</mark> Idemark of Ma ght © 2013 Ma	Community agento Inc. agento Inc.
rofiler) emory usag ode Profile	ge: real: 17 TimeCntEma	825792, emalloc: 17558048 Iloc <mark>RealM</mark> em								
Note:	This fe	eature is currenctly	v available for	Cancelled Or	ders					

# 4.4 Handle Taxes When Importing Orders From Magento

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

	Messaging Sales Accounting	hardaas Waxhaan kagana kandaalang Reporting Ketings 🛛 🔤 🖪 🔤						
		Taxes / ST11 Edit Create			More -			3/13 🗰
	Customer Process Customer Process Customer Programs Customer Payments Customer Payments Supplier Indices Supplier Relands Supplier Relands Supplier Payments Supplier Payments Supplier Tax Kop	Tax Name Tax Code	Standard rate sales (20%) ST11			Tax Application Sal Active	ie	
		Tax Computatio	DN Percentage 0.20000			Misc Sequence 1 Included in base amount		
Dan kahan Dan kaba Bana Caah Rag Janual Janual Sana (Janua Janual Sana (Janua) Janual Sana (Janua)	Bank Stakements Bank Stakements Cath Registers Journal Entries Journal Entries Journal Ventries Journal Vouchers Analytic Journal Items Charts	Invoice Tax Account Invoice Tax Analytic Acc Account Base Code Base Code Sign Account Tax Code	220000 Sales Tax Control Account 6 - Total value of sales ex VAT (box 8 included) 1.00 1 - VAT on Sales and other outputs			Refunds Refund Tax Account Refund Tax Analytic Account Refund Base Code Base Code Sign Refund Tax Code	20000 Sales Tax Control Account 6 - Total value of sales ex VAT (box 8 included) - 1.00 1 - VAT on Sales and other outputs	
	Chart of Accounts Chart of Analytic Accounts Chart of Taxes Payment Follow-up Reconcile Invoices & Pay Send Letters and Emails Do Manual Pellow-Ups	Tax Code Sign Children/Sub Ta Tax on Children Sequence	axes	1e Tr	ax Included in Price	Tax Code Sign	-100	Tax Code
	Períodic Processing     Períodic Processing     Proteconciliation     Recurring Entries     End of Period							
See screenshot below:	Reporting Legal Reports Generic Reporting Configuration Periods	Magento Is this tax used on mage Is this tax applied on ma	ento ? 🖉					

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

Edit Rule		C Dave Reset Corbente Rule & Save Rule & Save and Conta
x Rule Information		
Name *	Retail Customer-Taxable Goods-Rate 1	
Customer Tax Class *	Retail Customer	
Product Tax Class *	Taxable Goods Shipping	
	VAT Standard VAT Marginal	
	VAT Zero	
Tax Pate	US-CARate 1	
	US-NY-*-Rate 1	
	VAT Marginal	
	VAI Zero	

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

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

### 4.5 Handle Taxes On Shipping

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

Customer Invoices								
Customer Refunds	Tax Name Tax or	magento Shipping	Tax Application	All				
Sales Receipts	Tax Code	Active	1					
Customer Payments								
Customers	Tax Definition Special	Computation						
Suppliers		computation						
Supplier Invoices	Tax Computation		Minn					
Supplier Refunds	Tax Computation		MISC					
Purchase Receipts	Tax Type Percen	tage	Sequence	1				
Supplier Payments	0.2000	00	Included in base amo	Included in base amount				
Suppliers	Tax Included in Price		Tax on Children					
Bank and Cash								
Bank Statements	Invoices		Refunds					
Cash Registers	Invoice Tax Account		Refund Tax Account					
Journal Entries	Invoice Tax Analytic Account		Refund Tax Analytic A	Account				
Journal Items	Account Base Code		Refund Base Code					
Journal Entries	Base Code Sign	1.00	Base Code Sign	1.00				
Journal Vouchers	Account Tax Code		Refund Tax Code					
Analytic Journal Items	Tax Code Sign	1.00	Tax Code Sign	1.00				
Charts								
Chart of Accounts	Children/Sub Taxes	5						
Chart of Analytic Accounts	Tax on Children							
Chart of Taxes	C	Terr Manag	Tax to shaded in Pates		Teu Code			
Payment Follow-up	Sequence	Tax Name	Tax Included in Price		Tax Code			
Reconcile Invoices & Pay								
Send Letters and Emails								
Do Manual Follow-Ups								
Periodic Processing								
Draft Entries								
Reconciliation	Magento							
Recurring Entries	Is this tax used on magento ?	1						
End of Period	Is this tax applied on magent	o shipping ? 🗹						
Reporting								
<ul> <li>Legal Reports</li> </ul>								
	1							

Here details need to be set as highlighted in screenshot.

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

# About Openlabs Technologies and Consulting Private Limited

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

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

# 5.1 Technical Support

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CHAPTER 6

Indices and tables

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- modindex
- search