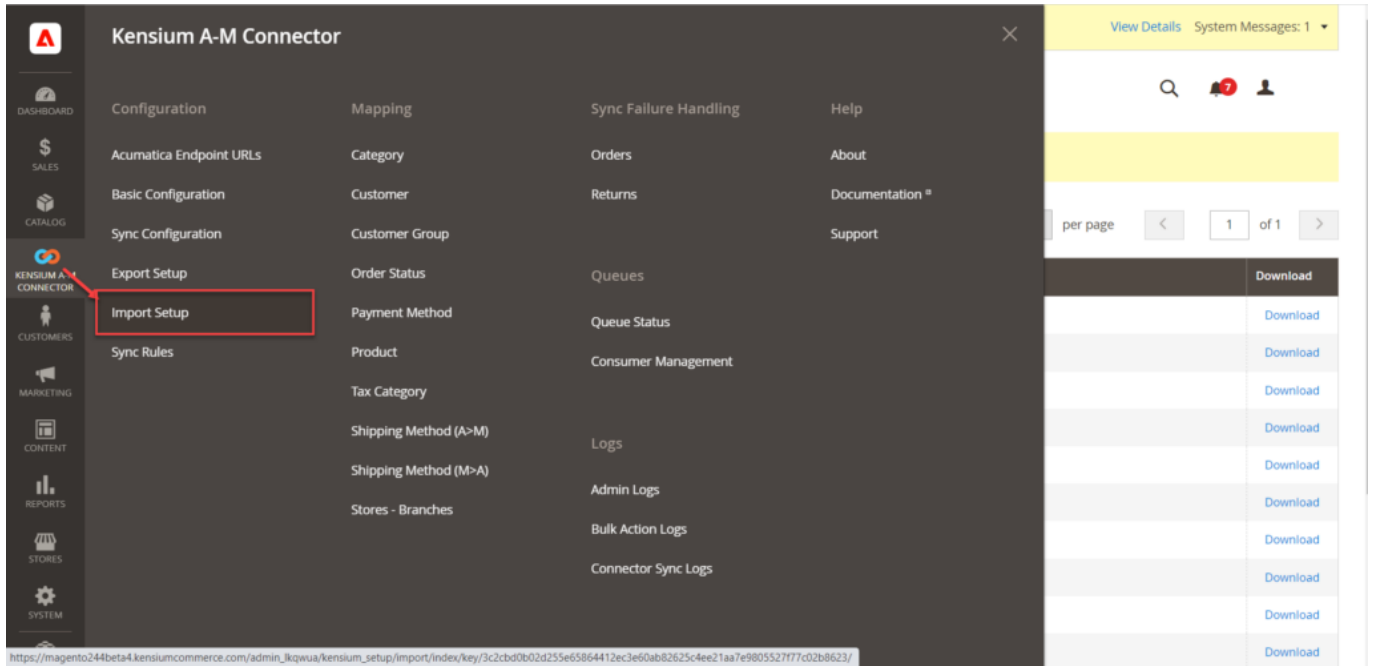


Import Setup in Kensium A-M Connector

The Magento connector allows you to export the configuration set-up for ease of use. You can import functionality for Mapping and Functionality. Click on the Import Setup as shown in the figure below.



Import Setup option in Configuration

Once you click on the [Import Setup] you will be redirected to the **[Import - Mapping & Configuration]** window.

You will have the option to choose the Entity Type from the drop-down menu. To import select the file that you want to import. Make sure you are selecting the correct file to successfully process the import as shown below.



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Task "Rule processing: 2.3": 1 Item(s) have been successfully updated. [View Details](#) System Messages: 1

Import - Mappings and Configurations

It's time to change your password.

Entity Type * Basic Configuration

Select File to Import * basic_configuration.csv
File must be saved in UTF-8 encoding for proper import

Import

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Import Routine - Mappings and Configuration

Click on the Import button to proceed. A pop-up window will appear on the screen before the records get inserted as ***[Please make sure all imported configuration paths are present in the system].***



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Task "Rule processing: 2.3": 1 item(s) have been successfully updated. [View Details](#) System Messages: 1

Import - Mappings and Configuration

Attention

Please make sure all imported configuration paths are present in the system

Cancel OK

It's time to change your password.

Entity Type * Basic Configuration

Select File to Import * [Choose File](#) basic_configuration.csv

File must be saved in UTF-8 encoding for proper import

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Application alerts



The application supports only the .csv file format. So, we strongly recommend you double-check the file format before importing.

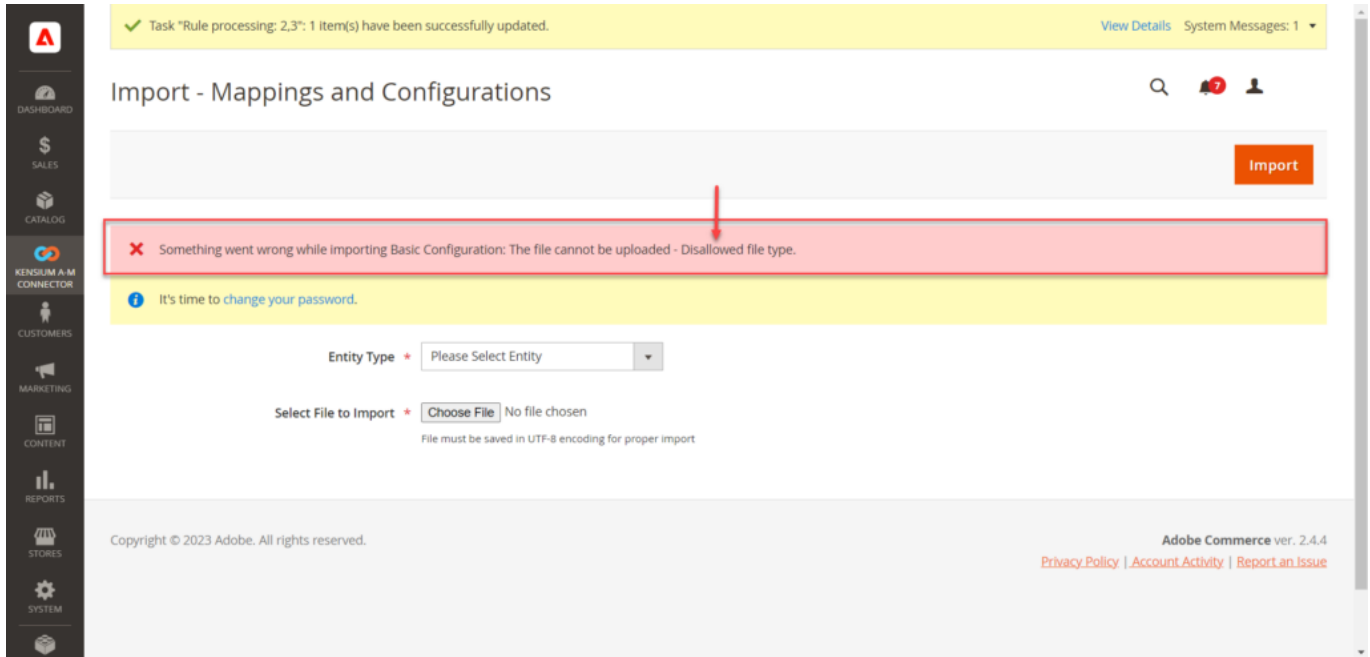


Confirmation message upon the successful import.

The application gives an information message upon the successful import along with the Entity Type.

| | |
|--|--|
| | <p><i>If the file type doesn't match in those cases the import will fail and you will be notified about this along with a hint about what caused the error.</i></p> |
|--|--|

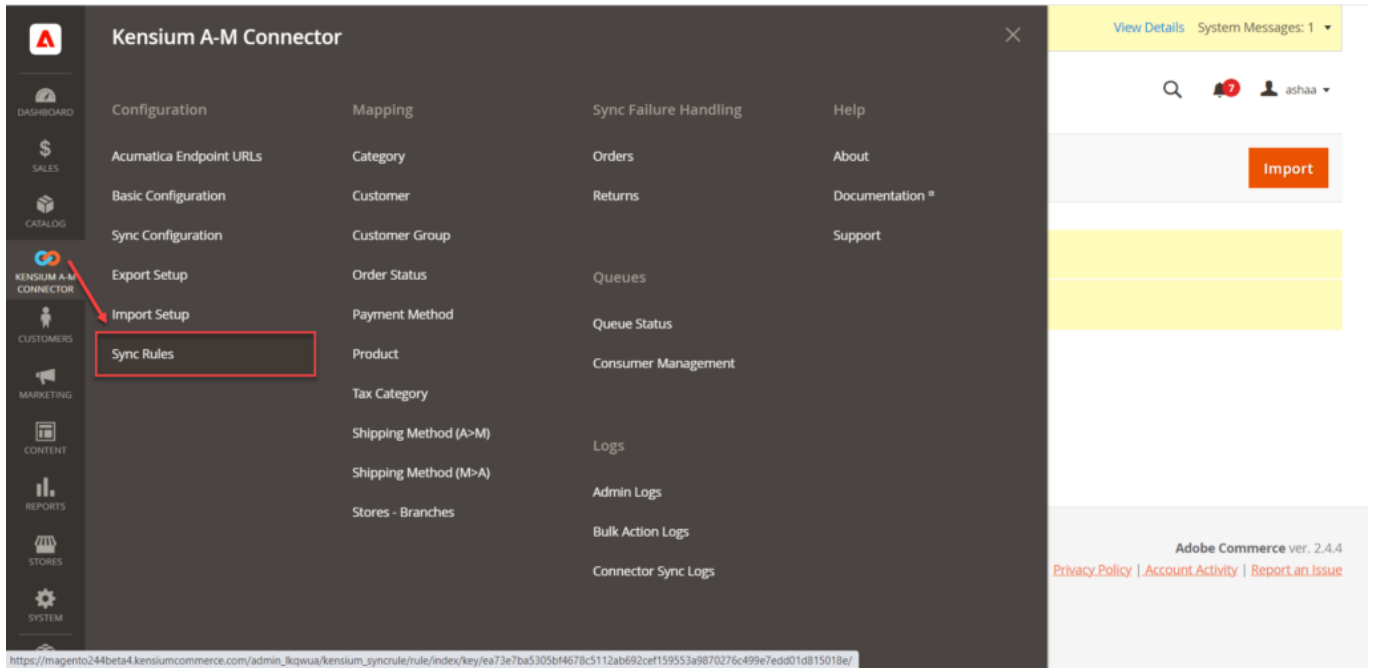
See below:



Import failed due to the wrong file type

Sync Rules:

The application allows you to set sync rules. The rule applies to the process of synchronization of orders. Under the Kensium A-M Connector, the Sync Rules option is available under the Configuration menu as shown in the figure below.

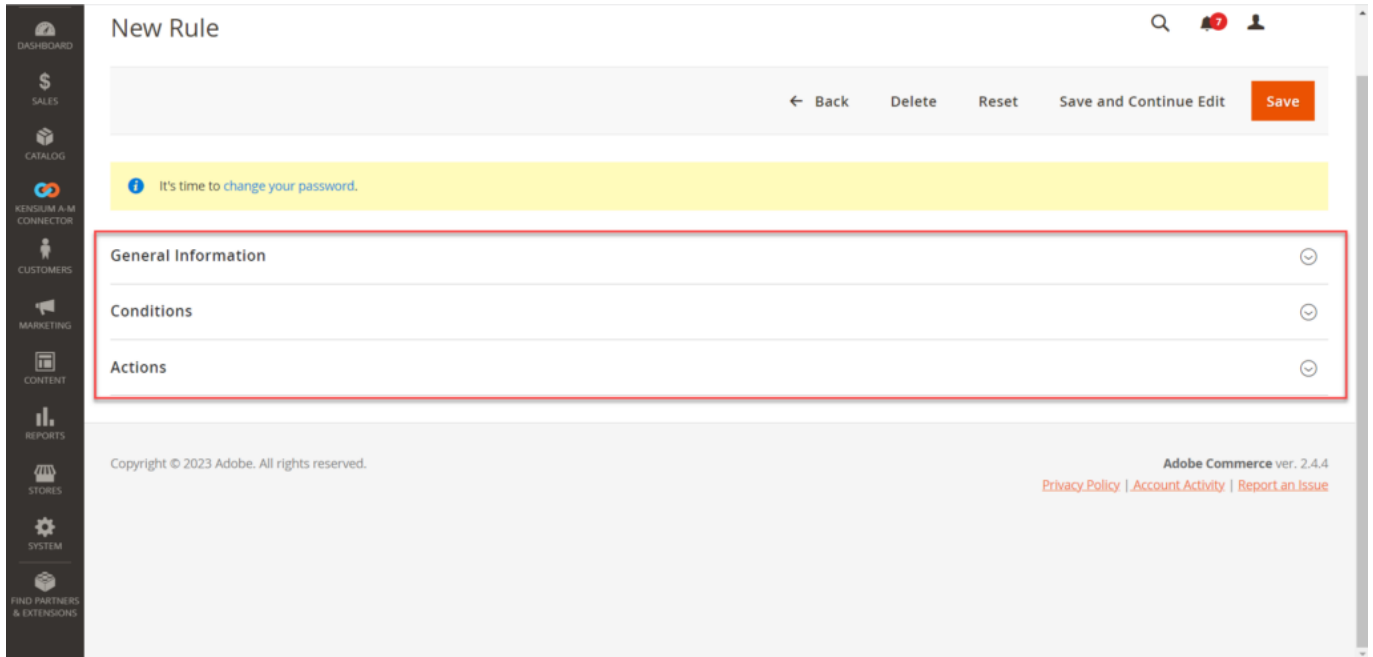


Sync Rules option in Configuration in Kensium A-M Connector

You can add sync rules from this section by clicking on **[Add New Rule]**.

The Add New Rule section is divided into the following:

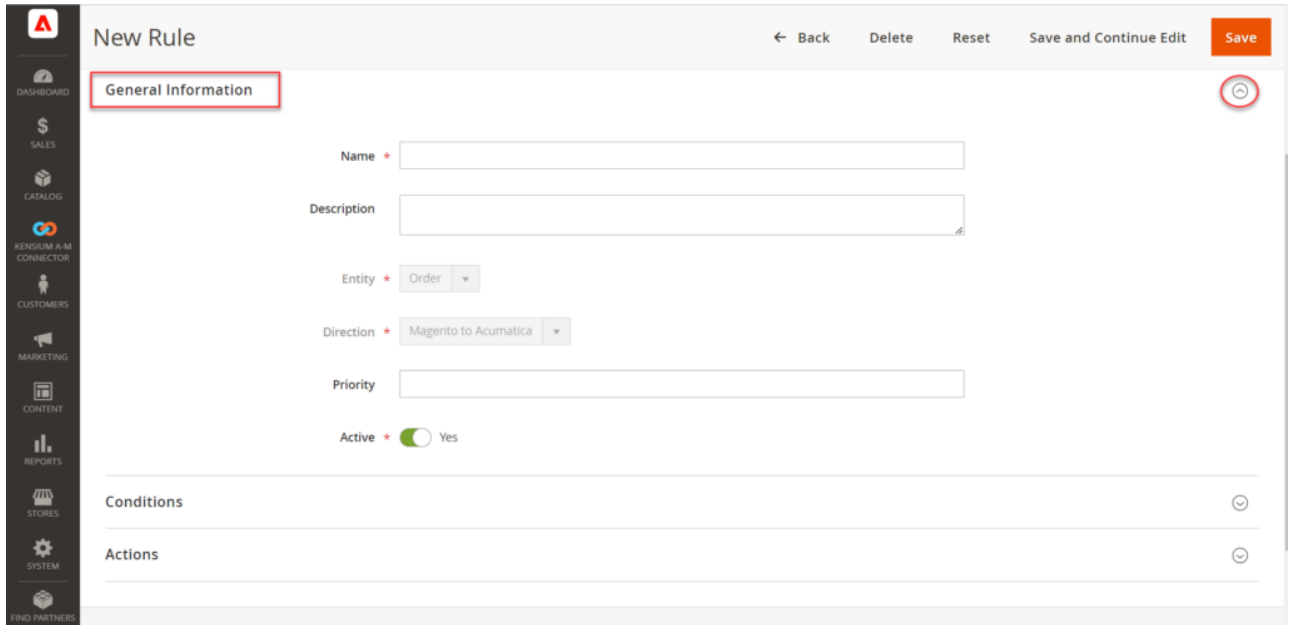
1. General Information
2. Conditions
3. Actions



Add a sync rule.

1. **General Information:** In the General Information section, you need to enter the following field-level information.
 - a. Name: This is a mandatory field. You need to set the rule name.
 - b. Description: You can write a general description for setting the rule. For example, if there is a negligible difference in the price of the product you can write in the description section.
This is an option field.
 - c. Entity: This should be by default Order. Since the sync rule applies to the order only.
 - d. Directions: This field is mandatory, however, doesn't require manual entry or selection. The data sync direction is set from Magento to Acumatica by the application.
 - e. priority: You need to set the priority of the Order syncing from Magento to Acumatica.
 - f. Active: This should always be enabled. Toggle the button to enable. This is mandatory to set the sync rule.

See below:



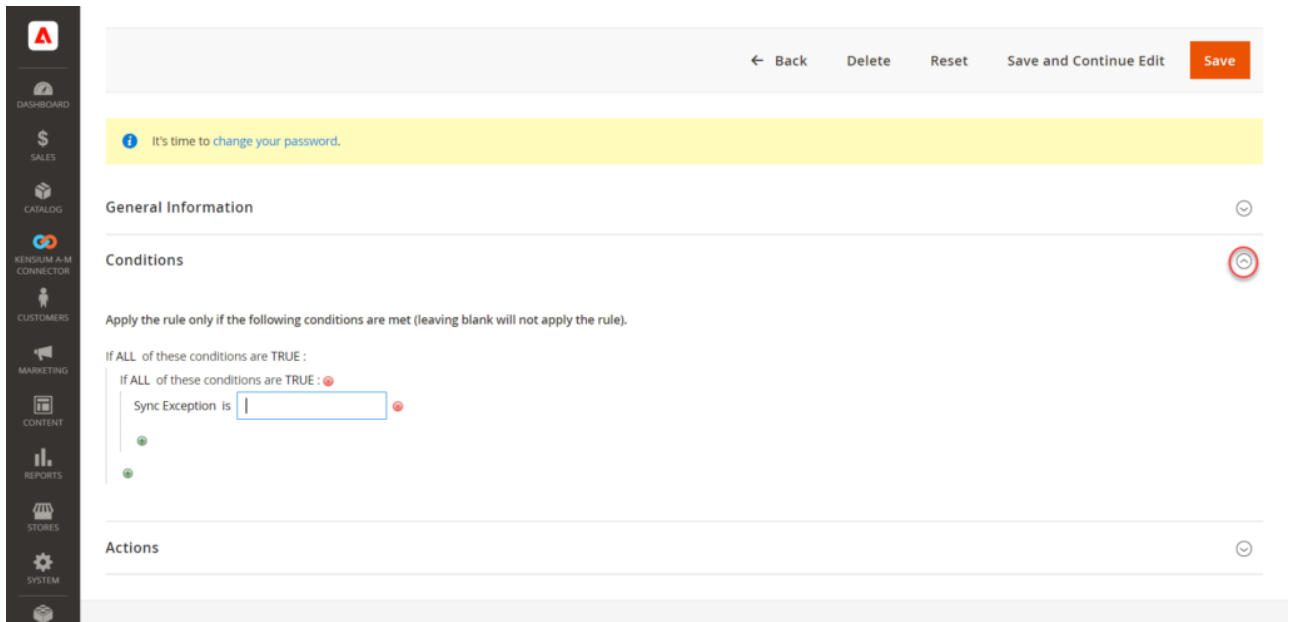
The screenshot shows the 'New Rule' configuration page. The 'General Information' section is expanded, showing the following fields:

- Name:
- Description:
- Entity:
- Direction:
- Priority:
- Active: Yes

Below the General Information section, there are sections for 'Conditions' and 'Actions', each with a collapse icon.

General Information section on expanding

- Condition:** This is an important section where you can apply the condition for the sync rule. You need to define the conditions that need to be met to set the sync rule.



The screenshot shows the 'New Rule' configuration page with the 'Conditions' section expanded. A yellow notification banner at the top reads: "It's time to change your password." Below this, the 'Conditions' section is expanded to show:

- Apply the rule only if the following conditions are met (leaving blank will not apply the rule).
- If ALL of these conditions are TRUE:
- Sync Exception is

Below the Conditions section, there is an 'Actions' section with a collapse icon.

Condition section after expanding



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If you leave the condition blank the rule will not be applied by the application.

- You can add the condition by clicking on the sign if all these conditions are true. The application will provide you with the following options to choose from the drop-down.



Conditions

Apply the rule only if the following conditions are met (leaving blank will not apply the rule).

If ALL of these conditions are TRUE :

Please choose a condition to add. ▼

- Please choose a condition to add.
- Conditions combination
- Connector Attributes**
- Sync Exception

The above options are available to choose from in the drop-down.

- *Condition combination:*
- *Connector Attributes:* Connector Attributes refer to the specific characteristics or properties that are utilized to establish a connection between Magento and Acumatica.
 - *Sync Exception:* You will get this option under Connector Attributes. After selecting the Sync Exception, the application will allow you to write the condition in the text box as shown below:

Conditions

Apply the rule only if the following conditions are met (leaving blank will not apply the rule).

If ALL of these conditions are TRUE :


Sync Exception is | ✖

+

Sync Exception in Connector Attributes

3. **Actions:** You can take any of the following actions based on the condition. You have to choose the action based on certain conditions.


- ✖ **Retry Order Sync:** In case you want to retry the order sync.
- ✖ **Retry Order Sync with Non-Stock Items:** In case you want to retry the Order Sync with the Non-Stock items, you need to select this option. The application will ask to enter the non-stock item ID in this scenario.

Actions 

Apply * ▼

Non Stock Id *

- **Stop Automated Order Re-Sync:** This will stop the automated order re-sync.
- **Stop Automated Order Re-Sync And Send Mail:** This action will stop the automated order re-sync and you will have an option to send an email to the contact. The following sub-field will appear on the screen, and you need to enter the information for all the mandatory drop-down and text fields.
 - **Email sender:** Choose the email sender from the drop-down.
 - **Email Template:** By default, the application provides you with an Order Sync Exception Email.
 - **Email Recipient:** Enter the valid email address of the email recipient.

Actions 

Apply * ▼

Email Sender * ▼

Email Template * ▼

Email Recipient *

- **Change Order Status:** You can change the order status from the drop-down menu. The following option is available in the drop-down.



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- **Order Status:** Cancelled, Closed, Completed, On Hold, Payment Review, PayPal cancelled reversal, PayPal Reversed, Pending Payment, Pending, Pending PayPal, Processing, Rejected.

After completing all the steps to sync rule setup you will be landed on the following **[Sync Rule]** screen.



Sync rules will be applied for the Magento to Acumatica failed orders only.

Sync Rules

🔍 🔔 👤

Add New Rule

📘
It's time to change your password.

Actions
4 records found

Filters
👁️ Default View
⚙️ Columns

20

per page

<
1
of 1
>

| | Entity Id | Name | Direction | Priority | Entity | Status | Created Date | Updated Date | Action |
|--------------------------|-----------|---|----------------------|----------|--------|----------|--------------------------|--------------------------|----------------------|
| <input type="checkbox"/> | 3 | Rule 1-Stop Automated Order Resync and Send Email-'CustomerID' cannot be empty Test. | Magento to Acumatica | 0 | order | Inactive | Apr 14, 2023 12:38:13 PM | Apr 28, 2023 12:45:06 AM | Edit |
| <input type="checkbox"/> | 4 | Rule 2 - Stop Automated Resync and send email-Unit Conversion is missing | Magento to Acumatica | 2 | order | Inactive | Apr 14, 2023 12:39:58 PM | May 22, 2023 4:46:43 AM | Edit |
| <input type="checkbox"/> | 5 | Rule 3- Retry with Non stock item | Magento to Acumatica | 0 | order | Active | Apr 14, 2023 12:43:13 PM | Apr 14, 2023 12:43:13 PM | Edit |
| <input type="checkbox"/> | 6 | Rule 4- Retry Order sync - The tax amount calculated by the external tax provider cannot be applied to the document.\r\nUnit conversion is missing,". | Magento to Acumatica | 1 | order | Inactive | Apr 14, 2023 12:46:46 PM | Apr 14, 2023 2:37:37 PM | Edit |