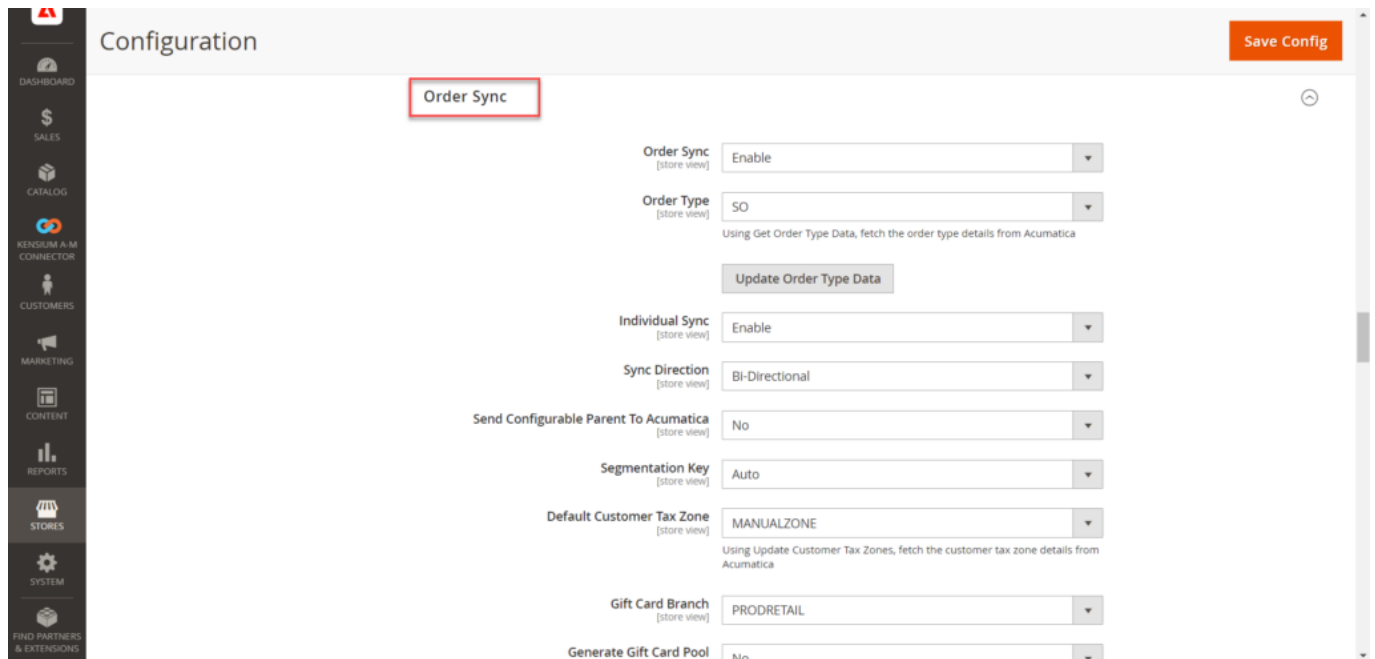


Order Sync in Magento

Order Sync in Magento Connector is Bi-Directional. To access the Order Sync in Magento Connector click on the [Kensium A-M Connector] on the left panel and click on [Sync Configuration] under [Configuration].



Order Sync in Magento Configuration

You will have the following fields to enter the details as per the sync requirement.

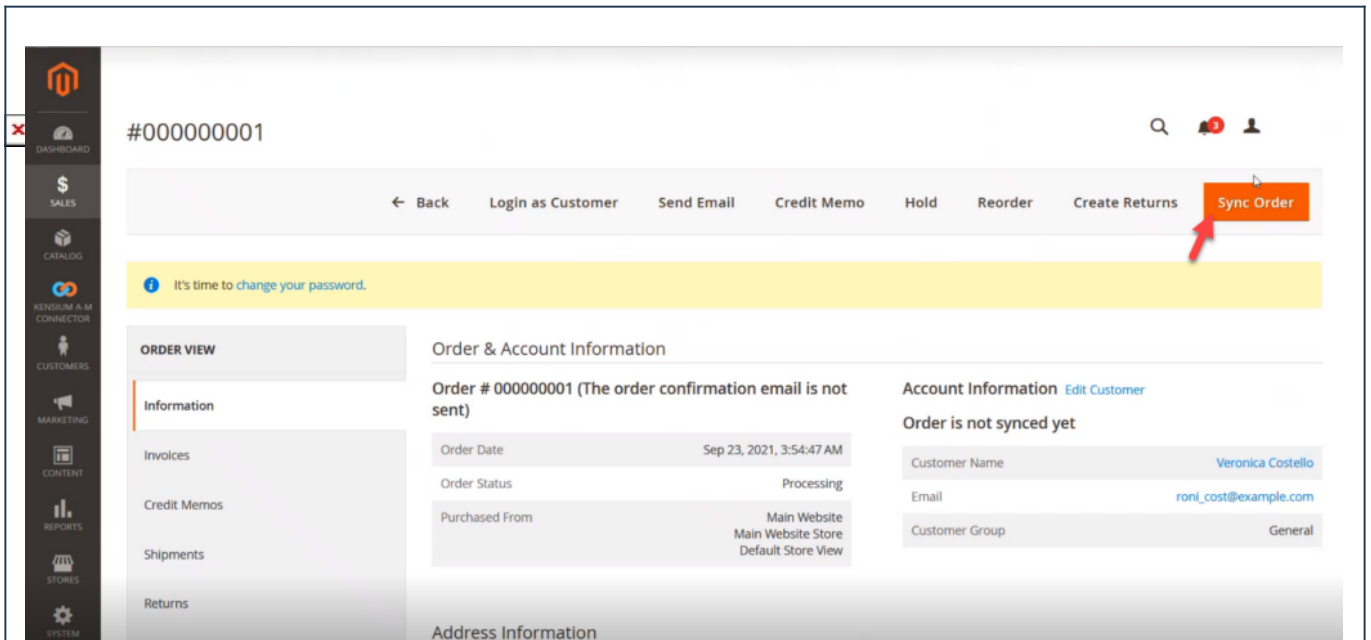
Field	Field Type	Description
Order Sync Details		
Order Sync	Drop-down	<p>You will have two options.</p> <ul style="list-style-type: none"> • Enable • Disable <p>To sync the order data, you must select the [Enable] option. Disable will stop the Order data sync process.</p>



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Order Type	Drop-down	You will have multiple options in the drop-down like SO, CR, CT etc. This will determine to get the order type data and fetch the order type details from Acumatica. When we are creating an order from Magento to Acumatica we already have different types of order types within Acumatica. For example, if the user has created an order type with SO in the e-commerce Site, then in Acumatica SO order type will be created. Note that, in Magento, we don't have any Order Type, however in Acumatica we have specific Order types.
Update Order Type Data	Button	This will fetch all the Order Types from Acumatica.
Individual Sync	Drop-down	You will have two options in the drop-down. <ul style="list-style-type: none">• Enable• Disable By default, you should select the [Enable] option. If enable is selected from the drop-down the [Sync Oder] button should be enabled at the top right corner of the Order page. Go to <i>Sales-> Orders-> View -> Sync Order</i> button should be enabled. You can individually Sync each order. If [Disable] the sync order option will not be visible.



The screenshot shows the 'ORDER VIEW' page for order #000000001. The top navigation bar includes buttons for 'Back', 'Login as Customer', 'Send Email', 'Credit Memo', 'Hold', 'Reorder', 'Create Returns', and 'Sync Order'. A yellow notification banner states 'It's time to change your password.' The main content area is divided into 'Order & Account Information' and 'Account Information'. The 'Order & Account Information' section shows: Order # 000000001 (The order confirmation email is not sent), Order Date: Sep 23, 2021, 3:54:47 AM, Order Status: Processing, and Purchased From: Main Website, Main Website Store, Default Store View. The 'Account Information' section shows: Customer Name: Veronica Costello, Email: ronl_cost@example.com, and Customer Group: General.


Sync Order in Sales Order upon clicking on view

Sync Direction	Drop-down	<p>Sync Direction will be Bi-Directional. You will have the following options under the drop-down.</p> <ul style="list-style-type: none"> • Acumatica to Magento • Magento to Acumatica • Bi-Directional <p>So, if you choose Bi-Directional the order data will be synced both ways.</p>
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 Segmentation Key	Drop-down	<p>A segmentation key is used to send Sales Order Numbering. You will have two options in the drop-down.</p> <ul style="list-style-type: none">• Auto• Manual <p>If you select auto the system will generate the Sales Order number automatically from Acumatica. However, if you choose manual a new field will appear on the screen to enter the Prefix. If it's set to Auto in Acumatica also it should be set to Auto for seamless integration.</p>
Order Prefix *	Textbox	<p>This field should only be enabled if you select Manual. The Prefix should be added here. For example, you can enter as an MA. So, the order number will be MA followed by the number.</p>
Default Customer Tax Zone	Drop-down	<p>There are different Tax zones based on the location within Acumatica. Use the Manual Tax Zone. This will help you map or sync the data more accurately. To make sure the Order Total placed in E-Commerce and Acumatica is the same. So, we recommend you set up the Tax Zone manually to eliminate the chances of the difference in terms of tax.</p> <p>Though the drop-down will provide the different Tax Zones, however, if you are sure about the zone then you can select the tax zone. Otherwise, select the Manual Tax Zone.</p>
Update Customer Tax Zone Data	Button	<p>By clicking on the button, the customer tax zone data will be refreshed and updated.</p>



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 Update Tax ID	Drop-down	We strongly recommend selecting the default Tax ID as Manual. Because based on the tax zone of the customer it varies within Acumatica as per the Tax legislation. When we are passing data from Magento to Acumatica it's better to set the Default Tax update ID as Manual. Otherwise, due to variations in the tax rate, we might end up with a difference in the tax amount. Manual selection will avoid this. If the user is sure about the Tax ID only, then they can select the ID from the drop-down.
Update Tax ID Data	Button	Clicking upon this button the TAX ID will be refreshed and updated once you make any change.
Default Sales Account	Drop-down	Select the default sales account code set in Acumatica. While syncing the data from Magento to Acumatica the sales account code will be considered for the transaction. In the drop-down, you will have multiple Sales Account codes. Select the one which you want to make the default.
Update Sales Account Data	Button	This button will refresh and update the sales account data upon clicking.



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 Default Payment Method	Drop-down	You must select the default payment method as check*. Due to customer security, we strongly recommend not selecting credit card details. During the sync process from Magento, it goes to the connector and from the Connector it reaches Acumatica. In Acumatica we don't want to save the customer's credit card details. You will have a couple of options in the drop-down.
Update Payment Method Data	Button	This button will update the payment method data.
Default Cash Account	Drop-down	Like the default sales account you need to select the default cash account for the transaction to be passed from Magento to Acumatica. If the cash account is not mapped, then the value you have selected will be considered.
Update Cash Account Data	Button	This button will enable the Updated Cash Account Data.

Gift Card Cash Account	Drop-down	Choose the Gift card Cash Account from here. Multiple options will be available under the drop-down.
Update Cash Account Data	Button	Upon clicking the button, the application will update the Cash Account Data.
Send Order Confirmation Email	Drop-down	When you are placing an order and synching the same to Acumatica from Magento through the connector you can send an email notification to the registered customer through mail. You will have two options in the drop-down. <ul style="list-style-type: none"> • Yes <input type="checkbox"/> To send the email. • No <input type="checkbox"/> This will not allow the application to send the email.
Send Invoice Confirmation Email	Drop-down	If the Invoice has been generated from Acumatica to Magento and if you want to send an email to the customer select [Yes]. Otherwise, select [No].
Acumatica to Magento Order Payment Method	Drop-down	You will have multiple options in the drop-down. However, we strongly recommend that always choose to check/ money order as the order payment method. As we don't store sensitive information like credit card details in Acumatica always select [Check] or [Money Order].
Use the above payment method in the Checkout	Drop-down	To display on the Checkout page, select [Yes] from the drop-down. Else, select [No].

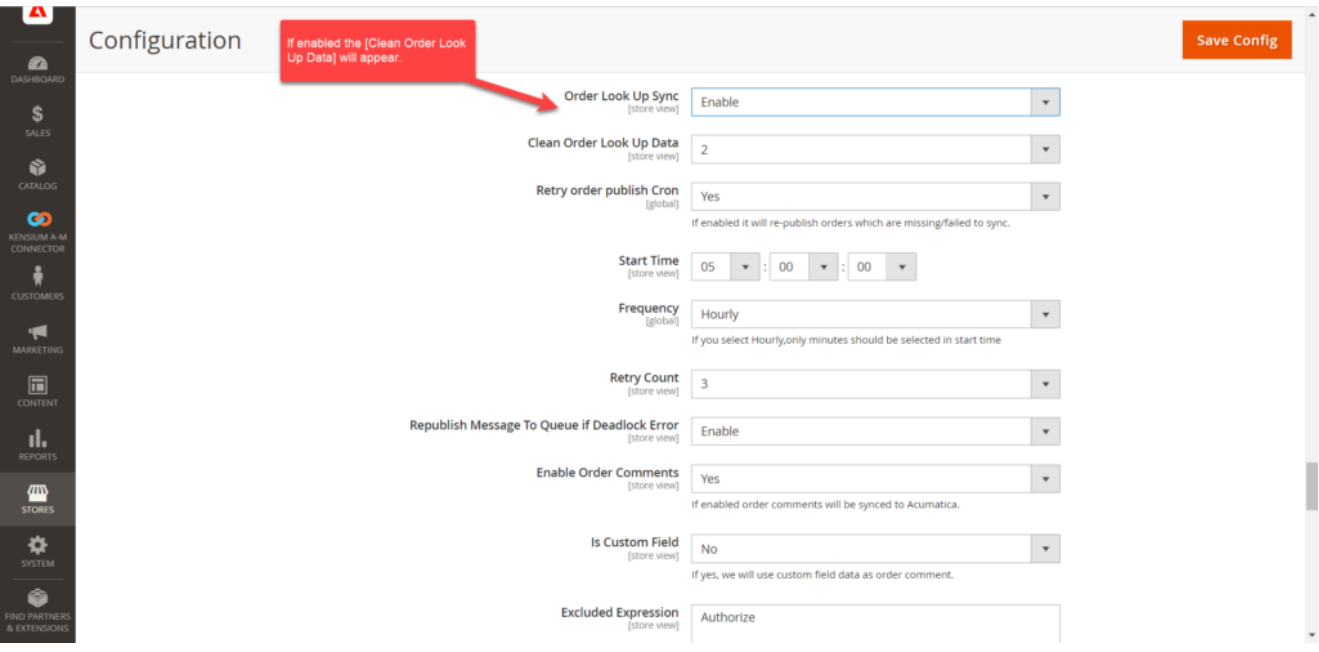


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Taxable Tax Category	Textbox	When a sales order is created in Acumatica requires a [Tax Category]. The tax category value will be used when the product tax category is not mapped and has multiple taxes. So, if the product is Taxable enter the tax category which should be displayed in the Sales Order of Acumatica.
Non-Taxable Tax Category	Textbox	If the product comes under a non-taxable category, you need to define the non-taxable category. This should be displayed in the Sales Order under the Taxable column within Acumatica.
Shipping Terms	Textbox	Within Acumatica in the sales order under the Shipping Tab, the [Shipping Terms] will be available. Also in the Customer section, you will find the Shipping terms. So, the shipping terms which are available within Acumatica will create a difference in terms of the freight charges. So, to avoid this mismatch in terms of the value we recommend you use No Shipping. This value will be passed from Magento to Acumatica and override the existing value. There will be no additional freight charges.
Send Warehouse to Acumatica Order	Drop-down	You will have two options. <ul style="list-style-type: none">• Enable -> If enabled you will get a new field as [Warehouse] as shown below.• Disable -> No warehouse details will be synced to Acumatica.

Warehouse (Optional)	Drop-down	You will have a couple of options as Warehouse. The value which we are passing from Magento to Acumatica should be reflected in the Order screen within Acumatica when it's enabled irrespective of the default selection against the product.
Update Warehouse Data	Button	Upon clicking on the button, it will refresh the data.
Order Look Up Sync	Drop-down	The order Look Up Sync refers to order edit. You will have two options. <ul style="list-style-type: none"> • Enable -> If enabled, the option [Clean order Look Up Data] will be enabled as a new field. Any changes with the quantity or price are allowed on the Magento side for the E-commerce data. • Disable -> If you select this option, you will not be able to edit the data within Acumatica.



Configuration

If enabled the [Clean Order Look Up Data] will appear.

Order Look Up Sync [store view] **Enable**

Clean Order Look Up Data [store view] 2

Retry order publish Cron [global] Yes
If enabled it will re-publish orders which are missing/failed to sync.

Start Time [store view] 05 : 00 : 00

Frequency [global] Hourly
If you select Hourly, only minutes should be selected in start time

Retry Count [store view] 3

Republish Message To Queue if Deadlock Error [store view] Enable

Enable Order Comments [store view] Yes
If enabled order comments will be synced to Acumatica.

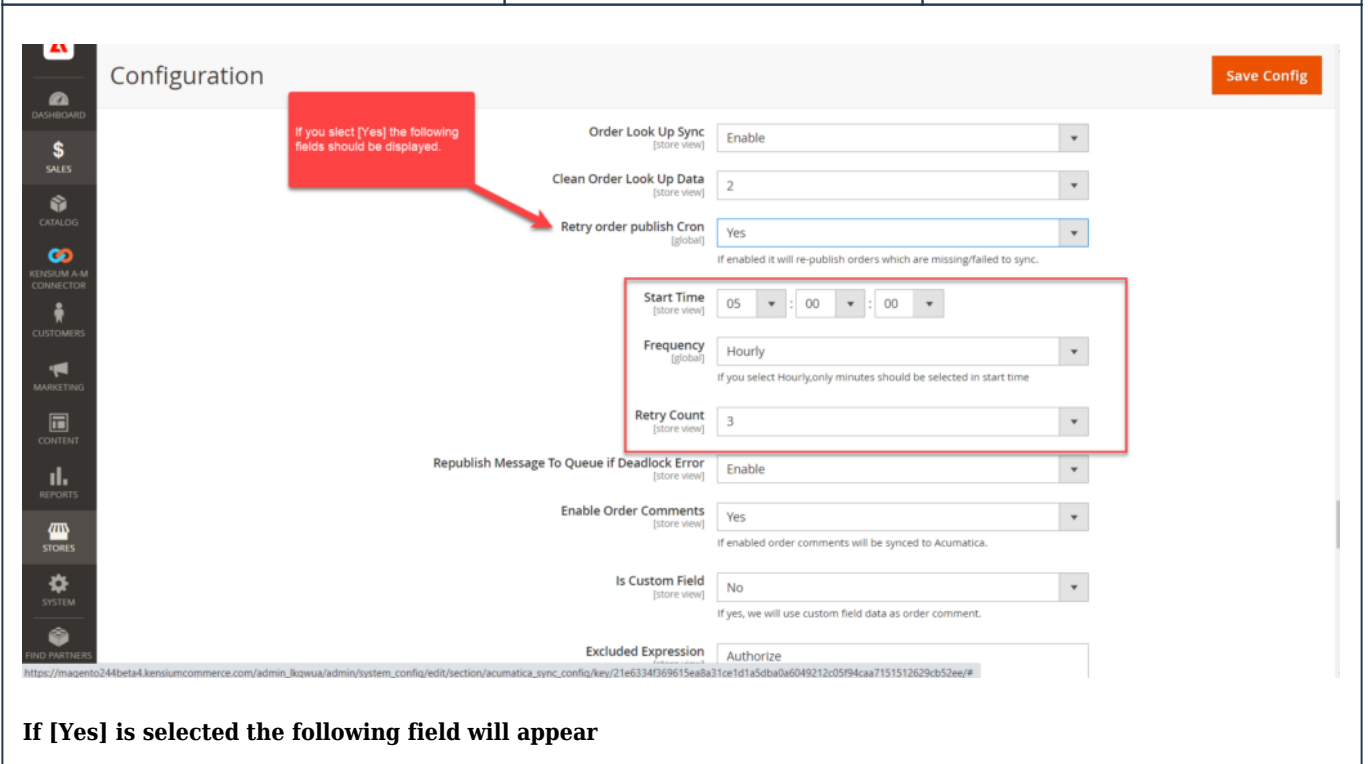
Is Custom Field [store view] No
If yes, we will use custom field data as order comment.

Excluded Expression [store view] Authorize

Save Config

On enabling the following field will be displayed

Clean Order Look Up Data	Drop-down	<p>From the drop-down, you will get the number of days to clean up the order look-up data. You will get the following numeric values [Days]. This will enhance the performance.</p> <ul style="list-style-type: none"> • 2 • 5 • 7 • 15 • 30
Retry order publish Cron	Drop-down	<p>You will have two options in the drop-down.</p> <ul style="list-style-type: none"> • Yes • No <p>In case the order sync gets failed you don't have to do it manually again.</p>



Configuration Save Config

Order Look Up Sync [store view] Enable

Clean Order Look Up Data [store view] 2

Retry order publish Cron [global] Yes
If enabled it will re-publish orders which are missing/failed to sync.

Start Time [store view] 05 : 00 : 00

Frequency [global] Hourly
If you select Hourly, only minutes should be selected in start time

Retry Count [store view] 3

Republish Message To Queue if Deadlock Error [store view] Enable

Enable Order Comments [store view] Yes
If enabled order comments will be synced to Acumatica.

Is Custom Field [store view] No
If yes, we will use custom field data as order comment.

Excluded Expression [store view] Authorize

https://magento244beta4.kensiumcommerce.com/admin_ikqwua/admin/system_config/edit/section/acumatica_sync_config/key/21e6334d69615ea8a31ce1d1a5d8a0e6049212c05f94caa7151512629cb52ee/#

If [Yes] is selected the following field will appear

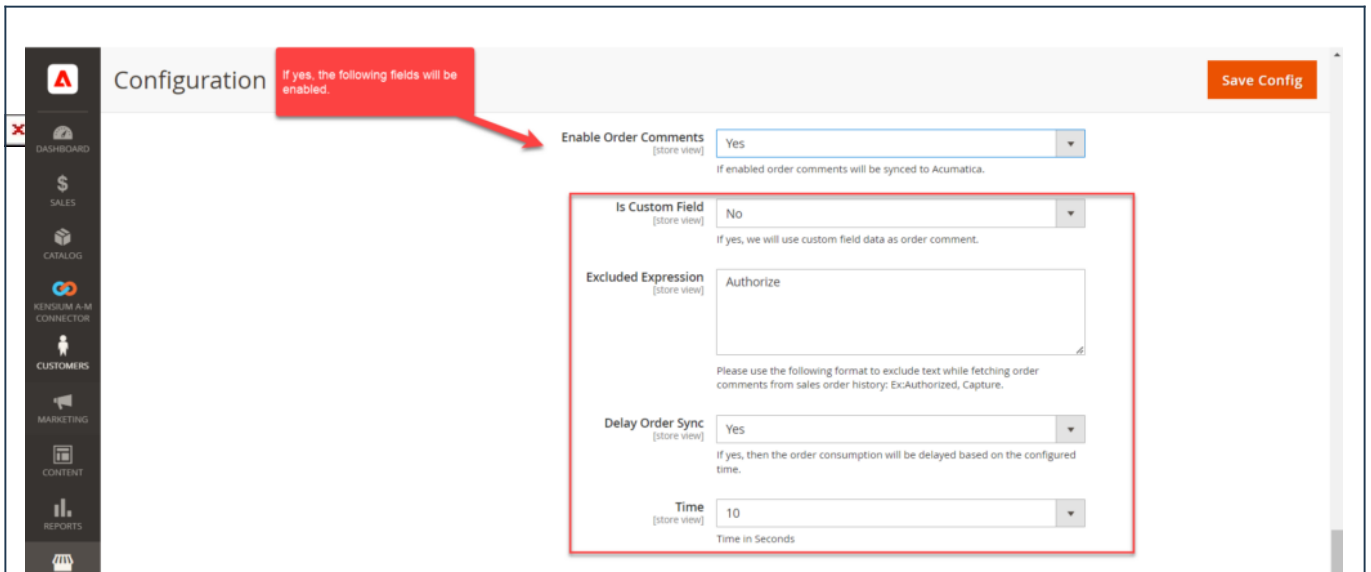
Start Time	Time picker	Define the start time from here to initiate the automated product re-sync process.
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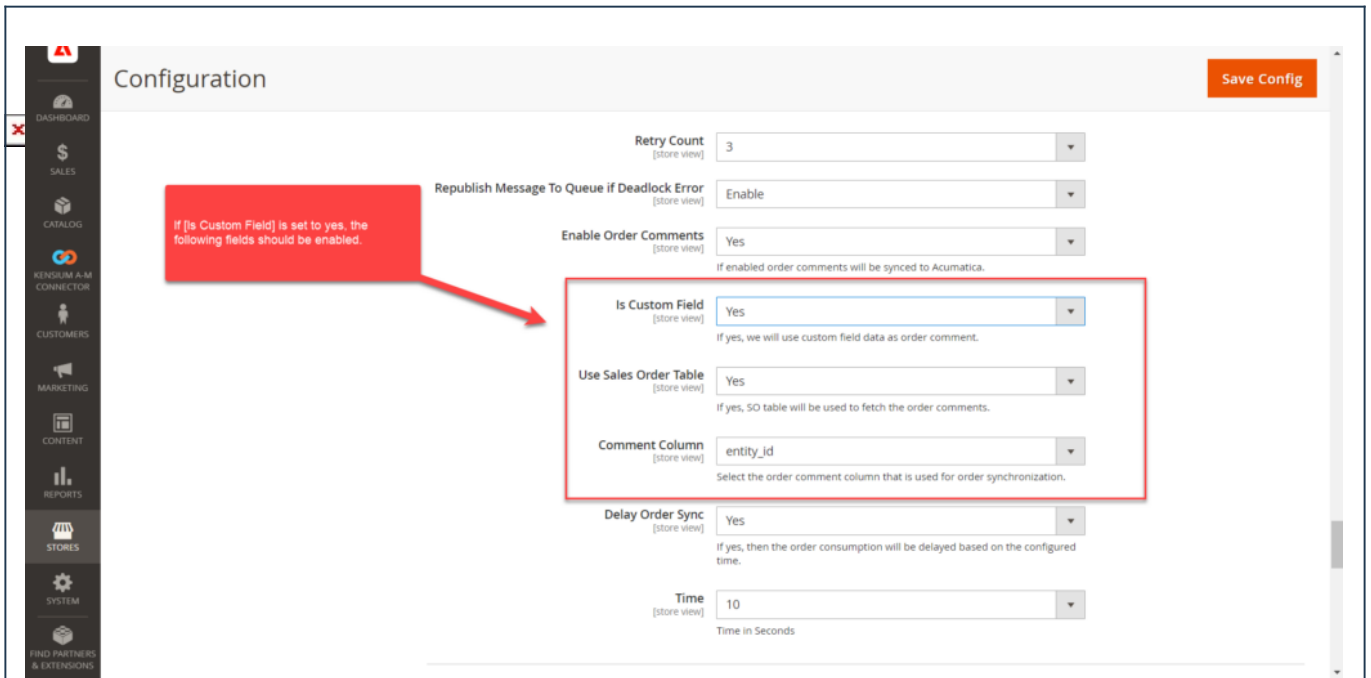
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Frequency	Drop-down	<p>Based on the frequency the automatic resync process will be initiated. You will have the following drop-down predefined values.</p> <ul style="list-style-type: none">• Hourly• Daily• Weekly• Monthly <p>For, if the order fails and 10:00 A.M. and the frequency is set to Hourly again at 11:00 A.M., the system will automatically initiate the re-sync.</p>
Retry Count	Drop-down	<p>Based on the count that you have selected the application will initiate to retry to pass the order. The drop-down will give you a value from a range of [3-9]. So if you set the retry count to 4 then 4 times the application will attempt the re-sync if it gets failed. In case it gets passed on 2nd iteration application will not take any further attempts.</p>
Republish Message to Queue if Deadlock Error	Drop-down	<p>You will have the following options.</p> <ul style="list-style-type: none">• Enable -> This will allow the application the republish the order if it has failed due to a Deadlock Error.• Disable -> This will stop the automated service of republishing.
Enable Order Comments	Drop-down	<p>You will have two options.</p> <ul style="list-style-type: none">• Yes• No. <p>You can choose the option to enter the Order Comments in Magento. If you select yes, it will enable ordered data comments to be synced to Acumatica.</p> <p>If you select No, then [Is Custom Field] and [Excluded Expression] will not appear].</p>



If you select Yes, the following sections will be enabled

Is Customer Field	Drop-down	<p>This option will have the following values.</p> <ul style="list-style-type: none"> • Yes • No <p>By default, this field should be selected as No.</p>
Excluded Expression		<p>Excluded Expression is a feature by which you can exclude the expression within Magento by using the text box. So, the comments that you would like to be excluded should be entered into the text field. The data which you don't want to sync with Acumatica should be excluded from here. If it's multiple comments in the order that you want to exclude use the comma separator. The data entered in the text box will not be passed to Acumatica from Magento. If you select Yes, then the following fields will appear on the screen.</p>



Configuration Save Config

Retry Count [store view] 3

Republish Message To Queue if Deadlock Error [store view] Enable

Enable Order Comments [store view] Yes
If enabled order comments will be synced to Acumatica.

Is Custom Field [store view] Yes
If yes, we will use custom field data as order comment.

Use Sales Order Table [store view] Yes
If yes, SO table will be used to fetch the order comments.


Comment Column [store view] entity_id
Select the order comment column that is used for order synchronization.

Delay Order Sync [store view] Yes
If yes, then the order consumption will be delayed based on the configured time.

Time [store view] 10
Time in Seconds

If the custom field is enabled the following field should be enabled

User Sales Order Table	Drop-down	By default, this should be set to [Yes]. It implies the same Magento order table (dB table) the comment column will show the Comment Column table names. If you are using a third-party application, then you need to select the option [No].
Comment Column	Drop-down	The comment columns include the entity_id, store_id, state, status etc.
Table Name	Drop-down	In case you don't have the same table or using any third-party table you need to select [No] from the drop-down.

 Entity Column	Textbox	<p>You need to copy the table name and paste it here. We recommend taking the help of the database administrator to get the actual table name. For example, if the table name is sales_order_payment you need to type the table name in the textbox.</p>
Reference Column	Drop-down	<p>You need to select which column is the entity id here. If you have selected increment ID, then you need to refer to the increment ID. You need to select the column of the table which is used to join the SO table.</p>
Comment Column	Drop-down	<p>After entering the entity column, you need to select the respective comment column name.</p>
Delay Order Sync	Drop-down	<p>You will have two options [Yes] & [No]. If you select [Yes] then the order consumption will be delayed based on the configured time.</p>
Time	Drop-down	<p>Based on the time set to the delay order sync will be impacted. The measurable units of time will be in seconds. For example, if you set it to 10 sec the sync will take place after 10 secs.</p> <ul style="list-style-type: none"> •
Send Shipment Confirmation Email	Drop-down	<p>This is always a single directional sync which is from Acumatica to Magento. You will get two options in the drop-down.</p> <ul style="list-style-type: none"> • Enable -> Shipment Data will only process if this option is enabled. • Disable -> Shipment Data will not process if this option is disabled.



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Republish Message To Queue if Deadlock Error	Drop-down	You will get two options in the drop-down. <ul style="list-style-type: none">• Enable -> If the shipment fails due to a deadlock error the package will be republished.• Disable -> No action will be triggered from the application
Returns Sync (Hold)		
Return Sync	Drop-down	
Individual Sync		
Segmentation Key		
Order Prefix		
Returns Statues Sync to Acumatica	List	
Send Return Confirmation Email		
Auto Authorize Returns		
Credit Memo		
Credit memo Creation Type		
Republish Message to Queue if Deadlock Error		