



K E N S I U M

Frequently Asked Questions

Acumatica - Magento Connector

Connector Version: 2.2

Supported Acumatica Version: 6.0

Supported Magento Versions: CE 2.1.X and EE 2.1.X

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LICENSING AND INSTALLATION

1. What type of Licensing is required for the connector to work?

On Acumatica, there is no licensing that is required. Acumatica customizations for eCommerce will need to be added to your Acumatica installation, which provides additional functionality such as the eCommerce tab for stock and non-stock items; additional web services end points, etc.

On the Magento installation, a license key is required to activate the sync solution with Acumatica.

2. Is there an Acumatica add-on (Customization project) that is required to be installed?

Yes, there will be two customization projects that need to be installed on Acumatica.

3. Does the Acumatica add-on require additional licensing?

No, licensing is only applied on the Magento side of the solution.

4. How is the connector product licensed?

Each connector license is valid for ONE Magento installation, and for multiple stores/websites on the same installation, additional store licenses would be required.

5. What is the licensing model? Annual or Perpetual?

Magento connector is available both on a recurring/annual, as well as on a perpetual model. In case of perpetual license, an annual maintenance fee is charged. AMC cost each year will be 18% of the cost of the Annual license.

6. What does the Annual Maintenance Contract Cover?

AMC provides the customer with access to the latest versions of the software, which will be needed as Acumatica, or Magento release new upgrades to their solutions.

7. How often are new versions of the connector released?

The connector product is typically certified within a few weeks of the release of new versions of Acumatica, or Magento. In addition, there could be a planned feature release of the connector solution, which will be notified to the customers.

8. How do renewals work?

On the recurring/annual licenses, Customer is sent an invoice from Balance Internet, and upon receipt of the payment, the license is renewed for an additional year.



9. Do I need to subscribe to the Annual Maintenance Contract?

On the Perpetual License, without the AMC, customer will not have access to the latest version of the software, or support. Any support requests would be charged by the hour at the prevailing rates, and software updates would require subscribing to AMC, and paying for any previous years' payments along with a 10% fee.

10. What is the cost of the connector?

Connector costs vary based on the type of installation. Please contact your sales representative for the pricing.

11. Is the Connector sold directly to the customer by Kensium?

No, the connector is sold via the Acumatica VAR that is performing the Acumatica implementation.

12. What are the commissions to the Acumatica reseller?

Kensium includes commissions to the reseller as per the table below. Kensium will raise an invoice to the VAR for the amount excluding the margins.

# Licenses Sold per year	Sales Margin	Maintenance Margin
Less than or equal to 2	30%	10%
Greater than 2 and Less than or equal to 5	40%	15%
Greater than 5	50%	25%

13. Is there a trial or development license available?

Yes, a trial/development license of the connector is available.

14. What are the limitations of the trial license?

Trial license has a validity of 30 days, and limits the sync to 100 records for each entity.

15. How do I know that my license is about to expire?

Email notifications would go 30, 7, 3, 2, and 1 days before expiration, and these notifications would be sent to the "Admin" email that is configured in the license request screen.

A notification will also be shown on the Admin section in Magento, when the administrator logs-in.



16. After the license expires, what would happen?

Once the license expires, all of the Acumatica-Magento Connector features would be disabled and only help and License sections would be active and accessible.

17. How can I renew an Annual/Recurring license?

Upon receiving payment for the renewal, Kensium will provide a renewal license code, which needs to be applied on the license screen of the application.

18. If I send a license request for renewal one month before expiration, would the remaining one month validity get added to the renewed license?

Yes, any time left on the previous license would be added to the renewal.

19. Do I need to purchase another license, if I create a new store in the existing website?

Yes, connector license is based on Magento installation, and the number of stores. If a new store is being added to a Magento installation, which exceeds the number of licensed stores, a new license needs to be generated for the additional store.

SALES

1. How many implementations have you done?

Kensium has implemented the connector between Magento and Acumatica for over 40 customers.

2. If my customer is looking for a Magento site along with the connector implementation, can you help?

Kensium is a Magento Enterprise level partner, and has one of the largest development teams with a large capacity to deliver and support medium and large enterprise scale solutions. In addition, Kensium also has the largest certified Acumatica Developers as in-house implementation assist services and can augment your sales team with any pre-sales and implementation activity for the website as well.

3. How long does a connector implementation take?

A typical connector implementation would take around 80 hours spread over 3-4 weeks. However, the actual time and effort would depend on any customizations that are needed, and would be determined upon discovery.

4. Who does the actual implementation?



Magento website development and implementation will be handled by Kensium, unless the customer has an existing Magento website. Acumatica implementation services will be provided by the VAR, and the connector implementation services would be provided by Kensium or a certified commerce edition VAR.

5. In case of support needed for the connector, who provides it?

Kensium provides 24x7x365 support for the connector services. VARs can also utilize Kensium to offer support services to their customers for Magento, as well as Acumatica.

TECHNICAL

Setup Related Questions

1. Is there a middleware component involved?

No, there isn't any middleware component. Acumatica connector is a native Magento extension that communicates with Acumatica directly via web services.

2. What versions of Magento does the connector support?

The Acumatica-Magento connector supports Magento versions 1.9.x Community, 1.14.x Enterprise, as well as 2.1.x Community/Enterprise editions.

3. What additional components do I need on Magento or Acumatica?

Other than the customizations provided as part of the connector solution, no other components are needed for the connector. On Magento, ionCube loader is required along with SSH access to the server to setup the connector.

4. Can I install other extensions on Magento after Acumatica-Magento Connector is installed?

Yes, Magento connector is built based on Magento extension framework, and should work with other extensions that are also built as per Magento standards. However, we recommend that you first install all the components on a staging instance, test for any incompatibilities and then push the changes to production.

5. What Acumatica API framework does the connector use? Screen or Contract based APIs?

The connector uses a combination of both frameworks. Certain functionality within Acumatica performs better in one framework versus others (e.g. Screen based API for Order Creation is faster than Contract based API – lesser number of calls).



Supported Functionality Related Questions

1. Do you support Matrix inventory items?

Yes, the Magento connector supports Matrix inventory (also known as configurable products in Magento). In addition, the extension also works with Product Configurator for Acumatica (an extension that Kensium has on the Acumatica extensions catalog)

2. Do you support Multiple Stores / Websites?

Yes. The connector supports multiple stores. Configuration settings are required to maintain orders in Acumatica for each store (using branches in Acumatica).

Default supported setup assumes that there are multiple stores in the same Magento instance. If there are multiple instances of Magento (each having one or more stores), all pointing to the same Acumatica instance, then additional customization is needed to ensure data from the various Magento instances are kept unique.

3. Can this tool be used for migrating data from existing Magento sites into Acumatica?

The connector tool uses Web Services to exchange data between Magento and Acumatica. Hence it is better suited for real-time transactions, than as a bulk data migration tool.

4. How do you handle Gift Cards?

Magento Community Edition does not support Gift Cards out of the box, but Enterprise edition does. Acumatica does not have Gift Card functionality, so this payment type is mapped to a cash account in Acumatica.

5. How do you handle Reward Points?

Customizations are required if reward points are to be maintained in Acumatica. Custom attribute can be created on the customer record to hold the current rewards points balance. In addition, accounting needs to be setup to handle the balance as liability in Acumatica.

6. How are Discounts handled?

Magento supports both Item and Cart level discounts both with and without a discount code. Acumatica requires a discount code and sequence to be applied for each discount. Since Marketing programs and discounts can vary quite a bit, it would be difficult for an ERP (Acumatica) to keep up. So, the sync tool passes item level discounts as "Manual" Discounts at item level on the sales order. Cart level discounts are distributed across the line items proportionally.

7. Can you handle Authorizations in Magento, and Capture in Acumatica?



Yes, as long as the same tokenized payment gateway such as Authorize.net is used, payment can be authorized in Magento, and captured in Acumatica.

8. How do you integrate with Market Places?

Magento already has a lot of established extensions that connect to market places such as Amazon, eBay, etc. These can be used to integrate the market places to Magento, and the Magento-Acumatica connector can be used to transfer this data from Magento to Acumatica, and back.

9. Do you support multiple warehouses?

Acumatica supports multiple warehouses, but Magento only supports a single warehouse out of the box. So, a default warehouse needs to be selected.

Alternately, Magento does have multi-warehouse extensions, which can be setup and customized.

10. Are partial shipments supported?

Yes, partial shipments are supported, and synced to Magento.

11. Are partial invoices supported?

No, partial invoices are not supported by the connector on Magento.

12. Are Acumatica KITS handled by the Connector?

No, the Connector does not handle Acumatica Kits. If similar functionality is needed, please check into Product Configurator on the Acumatica extensions catalog, which provides this via Grouped as well as Bundle product types.

13. Does the connector support Drop Ship type items?

Since Drop Ship is ERP functionality, Magento, and the Connector do not really manage this functionality. However, Acumatica can be setup to automatically create drop-ship POs based on the item.

14. Can vendor drop ship inventory be managed in Acumatica and synced to Magento?

This functionality is not available by default, but can be achieved with some customizations. Vendor drop-ship inventory can be maintained via an attribute on the Vendor table, which can then be pulled into Magento via a customized Inventory sync.

15. Does the connector handle multiple part-numbers (cross-reference feature) in Acumatica?



No, the connector out of the box does not handle cross-reference functionality, but this can be customized to be passed to Magento in the alternate search fields or custom attributes.

16. Does the connector handle Magento Custom Options?

With some small customizations, this can be supported. Custom options can be synced with the Product Configurator module in Acumatica, or just pulled in as additional line items on the sales order, or as Notes associated with each line item on the sales order.

How and What?

1. What data is synced between Magento and Acumatica?

Attributes (Customer and Product), Categories, Products, Customers, Orders, and Shipments

2. Between Magento and Acumatica, which one is the system of record?

The connector solution allows the data to be synced bi-directionally and can be setup to have either of the system as the master. However, in an ideal situation, Acumatica should be the system of truth for Product Catalog related information, with the customers and orders created in Magento flowing into Acumatica.

3. Is the sync bi-directional?

Yes and one can also choose the direction of the sync at an attribute level and not just at the entity level.

4. Are the Syncs happening in real-time?

Only Order Sync can be configured to be run in real-time (as soon as the order is placed in Magento). All other syncs are set on a schedule (cron jobs).

5. Can the orders be synced into Acumatica in real-time?

Yes, Order sync can be configured to work in real-time or in a batch mode.

6. How often can I run the syncs?

This depends on the number of records that could be modified between two consecutive syncs. Since each sync process is only pulling/pushing the changes (delta) from the previous sync, the interval between two consecutive syncs depends on the time it takes to sync the data that would have changed. This is estimated during the discovery process.

7. Is the order number the same between Acumatica and Magento?



Magento order number can be passed to Acumatica, and the same order number can be maintained by setting the order sequence number in Acumatica to Manual. The challenge is to ensure that the users in Acumatica are not creating orders with number that conflict Magento orders. This can be achieved by setting up a specific order type for orders coming from the web (WO), and controlling permissions on these orders.

8. What is the unique identifier for customers?

Email ID is used to determine uniqueness of a customer. When a new customer is created on Magento, the connector looks up a customer based on Email ID. If the customer record is found, the Acumatica Customer ID is saved on the Customer record in Magento, which will then be used for subsequent sync calls. Otherwise a new customer is created.

9. Is Inventory managed in Magento?

Yes, Magento maintains its own inventory for products, which is decremented when an order is created. However, inventory sync replaces inventory data in Magento with the latest data Acumatica.

10. How do taxes work between Acumatica, and Magento?

One can setup taxes utilizing in-built tax tables in both Magento and Acumatica, or a customer can also use a tax service in both the systems. Taxes calculated in Magento can be passed on to Acumatica on the sales order, so it is not re-calculated in Acumatica unless there is a change on the sales order.

11. Will data get synced automatically after Acumatica-Magento Connector is installed and configured?

Data synchronization starts only after configuring the sync schedules in Magento. The admin determines whether the sync process takes place on a scheduled basis or manually.

12. What Magento product types are supported by Acumatica-Magento Connector?

The Connector supports stock (simple), and non-stock items. In addition, if the Product Configurator module is installed on Acumatica, the connector also syncs composite (Configurable, Bundled and Grouped) products.

13. Can I sync a specific item?

Yes, support exists for an admin user in Magento to sync a specific Product, Category, Customer or Order.

14. What are some of the reasons for an order to not sync from Magento into Acumatica?

There are several possibilities that can result in an order to not sync from Magento into Acumatica:

- Order Shipping Method or Carrier not configured in Acumatica, matching Magento
- Order Payment Method not configured in Acumatica or Magento



- Item not defined in Acumatica
- Sales Order Sequence number error
- Unsupported Product Types
- Credit limit for customer preventing the order creation in Acumatica
- Magento/Acumatica unable to Connect to Acumatica/ Magento
- Infrastructure issues such as lack of disc space on either the Acumatica or Magento
- Network connection issues

15. Does the connector tool maintain a log of all syncs and updates?

Yes, the connector maintains two different logs. The first one is for the data that is synced between the two systems, and another to track any updates to the configuration.

16. Can I re-sync failed orders individually?

All orders after a configured number of attempts to sync, are placed in a failed order queue, and the errors are shown in the failed order log. Once the errors have been corrected, either on Magento (e.g. invalid customer zip code), or on Acumatica (e.g. Product missing in Acumatica), the sync process for that order can be initiated again.

17. How are orders edits managed?

Magento (both Community and Enterprise editions) do not support editing of orders. So, in most installations, order edits are made in Acumatica, but not fully synced back to Magento.

However, extensions do exist for Magento to allow order edits, and if such extensions are implemented, then the connector code can be customized to support order edits.

18. How are RMAs handled?

RMA is an Enterprise Edition only feature in Magento and has some basic functionality such as initiating a return. The Admin section of Magento provides managing RMAs as well.

The connector supports limited integration for RMAs on Enterprise edition of Magento, where an RMA in Magento is pushed into Acumatica with the appropriate RMA Order Type.

RMAs on Community Edition of Magento can be supported as a customization based on the extension that is installed on Magento.

19. How does the Connector handle multiple UOMs defined on the same stock item in Acumatica?

Magento does not have multiple UOM functionality. So, a design decision would have to be made based on the customers' product setup (how they are purchased and merchandised). Accordingly, a customization is needed to set these up as either Configurable Products, or a Simple Product with Custom Options in Magento.



20. When Syncing orders, are customers automatically synced?

When an order is pushed from Acumatica to Magento, the sync solution checks to see if the customer already exists in Acumatica (Search by Email ID), and if one is not found, the customer is created, and the orders is then synced.

If the customer already exists, then the customer data is not updated, but the customer information on the order is populated with the information from Magento. This is because both Magento and Acumatica allow customer information on a sales order to be different than the customers' default information.

However, if the customer logs into the customer-area in Magento, and updates the default billing or shipping address on their customer record, the same is updated into Acumatica on the next Customer sync cycle.

21. Will order level billing and shipping information be saved to the customer record?

No, this information will be synced to the order only, as explained above.

22. Is an order required for a customer to be synced?

No. Magento allows a customer record to be created even without an order (New Account setup). These records are synced to Acumatica via the Customer Sync process, which is not dependent on orders.

23. Are newsletter subscribers in Magento synced into Acumatica?

No. Newsletter subscribers are not synced at this time.

24. What data is synced back to Magento from Acumatica upon fulfillment of an order?

When an order is fulfilled, and a shipment record is created in Acumatica, connector creates the shipment in Magento and passes back the Shipment Number, Ship Via, Shipped Date, Quantity, Line Items in the Shipment, and the Tracking Number.

25. Does the connector create invoices in Magento?

Yes, once an order is processed in Acumatica and an invoice is created, the connector creates the invoice in Magento as well, and marks the order as Complete in Magento.

26. How does the connector handle freight charges between Magento and Acumatica?

Acumatica re-calculates freight when sales order is created (based on the Ship Via code passed in the sales order). Since this may result in a discrepancy in order totals, Connector setup includes configuration to ignore the calculated value (via Shipping Terms), and passes the Magento value in Premium Freight field.