



# KENSIMUM

## Feature List

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### 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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## INTRODUCTION

The Magento platform is trusted by more than 250,000 businesses, including some of the world's leading brands. Magento offers flexible, scalable ecommerce solutions designed to help businesses grow and succeed online.

Acumatica is the only secure, cloud and browser-based Enterprise Resource Planning (ERP) solution with such vast capabilities in its Financial Management, Distribution Management, Customer Management and Project Accounting suites, and is highly configurable and extensible.

Acumatica-Magento Connector seamlessly connects the Acumatica ERP and Magento ecommerce platforms. All essential storefront data that is stored in the Acumatica system is synchronized with the website. Acumatica-Magento Connector supports the following features:

- Attribute Mapping
  - Product
  - Category
  - Customer
  - Order status
  - Shipping Methods
  - Payment Methods
- Attribute sync
  - Product
  - Customer
- Manual Sync
  - Category sync
  - Product sync
    - Simple Products
  - Product Configurator sync
    - Simple Products
    - Bundled Products
    - Configurable Products
    - Grouped Products
  - Product Inventory and Price sync
  - Product Image sync
  - Customer sync
  - Tax Category sync
  - Order sync
  - Shipment Sync
  - Failed Order sync
- Sync logs
- Scheduler Configuration
- Timeline view
- Admin logs



- Help (Documentation & Support)

## Sync Directions at Configuration level

1. **Acumatica to Magento** - During sync process, system will always get the changes from Acumatica and update in Magento.
2. **Magento to Acumatica** - During sync process, system will always get the changes from Magento and update in Acumatica.
3. **Bi-Directional** - For Bi-directional sync, Connector provides three options: Acumatica Wins, Magento Wins and Latest Wins. These options are useful if data is being updated on both systems and at the same time.

## Sync Directions at Attribute level

1. **Acumatica to Magento** - During sync process, system will always get the changes from Acumatica and update in Magento.
2. **Magento to Acumatica** - During sync process, system will always get the changes from Magento and update in Acumatica.
3. **Bi-Directional (Last Update Wins)** - During sync process, system will look for changes on both systems and in case of conflict, will pick up the last update for that record.
4. **Bi-Directional (Magento Wins)** - During sync process, system will look for changes on both systems and in case of conflict, will pick up Magento as the final update.
5. **Bi-Directional (Acumatica Wins)** - During sync process, system will look for changes on both systems and in case of conflict, will pick up Acumatica as the final update.

## FEATURE LIST:

### 1. Attribute Mapping

- **Product Attribute Mapping**

Acumatica-Magento Connector provides an ability to get all the product attributes from Acumatica and store in Magento Database. All these attributes will be used for mapping with Magento product attributes.

From the mapping screen, we can run Update schema which gets updated values from Acumatica and also use recommended mapping which will set default values for common attributes.



- **Category Attribute Mapping**  
Acumatica-Magento Connector provides an ability to get all the category attributes from Acumatica and store in Magento Database. All these attributes can be used to map with Magento category attributes.
- **Customer Attribute Mapping**  
Acumatica-Magento Connector provides an ability to get all the customer attributes from Acumatica and store in Magento Database. All these attributes will be used for mapping with Magento customer attributes.
- **Order status Mapping**  
Acumatica-Magento Connector provides an ability to map Acumatica order status to Magento order status. There is a facility to create new statuses from this screen for additional mapping.
- **Shipping Methods Mapping**  
Acumatica-Magento Connector provides an ability to pull all the shipping methods configured in Acumatica into Magento.
- **Payment Methods Mapping**  
Acumatica-Magento Connector provides an ability to pull all the payment methods configured in Acumatica into Magento.

## 2. Attribute sync

Acumatica-Magento Connector provides an ability to get all the attributes from Acumatica and store in Magento Database. All these attributes can be used for mapping with Magento attributes. Attribute sync is applicable only for Products and Customers.

## 3. Customer Sync

### 3.1 Customer Creation from Magento to Acumatica

Acumatica-Magento Connector supports Customer sync from Acumatica to Magento and vice-versa. The Customer created or updated in Magento from last sync date will be synced to Acumatica and vice-versa. The sync will be happen based on the settings defined in the attribute mapping screen and sync configuration screen.

Note: Recommended setting is **Bi-Directional (Last Update Wins)**

#### **From Magento Front End**

Customer can create an account from Magento Frontend and can revisit the store using login credentials. Acumatica-Magento Connector creates this customer in Acumatica when the Customer sync process is executed.

#### **From Magento Back End**

Store Admin can create a customer from Magento admin panel. Once the customer is created by the Magento Admin, the customer receives a notification that his/her account has been created successfully. The customer can get his/her login credentials by clicking forgot password option from front end. The same customer will be created in



Acumatica using Acumatica-Magento Connector, when the Customer sync process is executed. Customer's default billing and shipping address will be synced to Acumatica. If a default shipping address is not provided then the billing address will be used as the shipping address.

### **Magento Guest Checkout with an Order along with Customer Creation in Acumatica**

Customers can check out in Magento as "Guest" users (without registering themselves). If the customer is not present on Acumatica, Connector creates the customer using Order level billing and shipping details provided by the customer and then creates the order on Acumatica.

### **3.2 Customer Creation from Acumatica to Magento**

Customer records which have email address are created / updated to Magento using Acumatica-Magento Connector, when the Customer sync process is executed.

## **4. Category Sync**

Acumatica-Magento Connector supports Category sync from Acumatica to Magento and vice-versa. Initially, sync process gets all the Categories and the product mappings if any, from Acumatica to Magento. Then the Categories created or updated in Acumatica from last sync date will be synced to Magento and vice-versa.

The sync will happen based on the sync directions setup in the configuration. Recommended setting for the direction is **Acumatica to Magento (data source is Acumatica)**

### **4.1 Category creation / update from Acumatica to Magento**

In Acumatica, products are assigned to single/multiple categories. Acumatica-Magento Connector syncs the category details to the corresponding products in Magento. Also, during Category sync, the mapped products are passed to Magento.

If new Category is created in Acumatica, Acumatica-Magento Connector will sync the new category to Magento along with product mappings (for the products existing in Magento & Acumatica) or updates product mapping for the existing Category. But if any new product is created in Acumatica and mapped to any category then, while running Category sync, new product will not be created in Magento.

### **4.2 Category creation / update from Magento to Acumatica.**

In Magento, products are assigned to single/multiple categories. Acumatica-Magento Connector synchronizes the category details to the corresponding products in Acumatica. Also, during Category sync the mapped products are passed to Acumatica.

## **5. Product Sync (Simple products)**

Acumatica-Magento Connector supports product sync from Acumatica to Magento and vice-versa. Initially, sync process gets all the products from Acumatica to Magento. Then the products created or updated in Acumatica from last sync date will be synced to Magento and vice-versa. The sync will happen based on the sync directions setup in the configuration.

Recommended setting is **Acumatica to Magento (data source is Acumatica)**



If new product is created or existing product is updated in Magento and if the product is associated with existing or new category, then, while running product sync, it will create a new category and Product (if not existing in Acumatica) and then map the products with the categories. This scenario also applies to 'Acumatica to Magento.

## 6. **Product Configurator Sync (Simple, Bundled, Configurable, Grouped products)**

Acumatica-Magento Connector supports Bundle, Configurable and Grouped products sync from Acumatica to Magento. Initially, sync process gets all the products from Acumatica to Magento. Then the products created or updated in Acumatica from last sync date will be synced to Magento. The sync will happen based on the sync directions setup in the configuration.

## 7. **Product Inventory and Price Sync**

Acumatica-Magento Connector supports inventory and price sync only from Acumatica to Magento. Sync process will update the inventory for all the products which are passed from Acumatica to Magento. The system provides an ability to sync Inventory only, Price only or/and Inventory with Price sync.

## 8. **Product Image Sync**

Acumatica-Magento Connector supports product image sync only from Acumatica to Magento. Sync process will update the images for all the products that are passed from Acumatica to Magento. These images will then be displayed on frontend.

## 9. **Tax Category Sync**

Acumatica-Magento Connector supports tax category sync from Acumatica to Magento.

## 10. **Shipping Methods Sync**

Acumatica-Magento Connector supports shipping Method sync from Acumatica to Magento and will be used for mapping with Magento shipping methods.

## 11. **Order Sync**

### 11.1 **Order Creation from Magento to Acumatica**

Orders get synced from Magento to Acumatica in Real-time or can be setup in CRONS.

**Individual Order Sync:** Individual Order can be synced from Order detail page by clicking on Sync Now.

### 11.2 **Order Creation from Acumatica to Magento**

New orders (SO type) that are placed in Acumatica are synced to Magento when the order sync is executed.

### 11.3 **Order Status Update Sync from Acumatica to Magento**

By default, Shipping and Completed Order statuses are updated from Acumatica to Magento during the sync process.

Acumatica-Magento Connector provides an ability to sync custom status as well.



#### **11.4 Payment Process**

Order payment/process is handled at Acumatica. Payment methods like Check / Money order or Credit card are authorized from Magento front-end and pre-authorized details will be sent to Acumatica. Payment can be captured based on the pre-authorized details in Acumatica.

#### **12. Failed Orders Sync**

During Order sync, if any order(s) fails to sync to Acumatica due to any issue like unavailability of product in Acumatica, payment methods configuration, new customer data inconsistency, etc. User can resolve those issues and re-sync the failed orders from Failed Orders screen.

#### **13. Shipment Sync:**

Shipping tracking number can be added to an existing order in Acumatica. During the Shipment sync process, along with the order status, tracking number information is updated to Magento from Acumatica. Once all the shipment details are updated in Magento, the order status is changed to complete.

#### **14. Sync logs**

Sync logs provide the history of sync execution via cron, manual sync or individual sync at entity level. Acumatica-Magento Connector provides a dropdown list of all the sync entities in the sync log. Upon selecting the entity, the grid will display the selected entity results *date wise*. Detailed view of sync will contain further details.

#### **15. Scheduler Configuration**

On scheduler configuration screen, user can see all the scheduled cron frequencies that are configured in sync configuration screen.

#### **16. Timeline View**

The Timeline view visualizes all past, current and future jobs showing their status, results, runtime etc.

#### **17. Admin logs**

Acumatica-Magento Connector has a provision to log and view every single action or change made on Magento back end in Acumatica-Magento Connector screens. Each action is logged which has tracking history and exactly which user did what and when.



## 18. Help (Documentation & Support)

### 18.1 Documentation

Acumatica-Magento Connector has a provision to seek help on this page. Documentation section will contain a link to product related documents such as User Manual, Feature list, Limitations, Assumptions, FAQ etc.

### 18.2 Support

Support section will have an interface where admin user can contact Acumatica-Magento Connector team for support.

Support options are

- Sales Support
- Customization Service
- Free Trial Request
- Technical Support
- Urgent Issue
- Installation Service
- Request Upgrade
- Other

Admin user can also set the support priority as below.

- Normal
- Medium
- High
- Urgent

Once an admin user submits the support request, an email gets triggered to Acumatica-Magento Connector team with all the details filled by admin user.

**Note:** The support data will not be saved in Magento server.

Support section will also display the system requirement which will be useful while setting up Acumatica-Magento Connector along with cron configuration.