

DEAR Inventory - Magento Integration Guide

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Introduction

Data exchange between two systems include

- Products (simple products only). Each product variation in Magento must have unique SKU. Configurable products require individual simple products for each variation. These simple products will have individual SKUs in DEAR
- Stock level changes
- Sale orders and credit memos (from Magento to DEAR only)
- Customers (from Magento to DEAR only when sale occurs)
- Shipment tracking number (from DEAR to Magento)

Every time when stock level changes in DEAR Inventory Magento gets notification about this event and changes quantity accordingly. Every time when customer buys product from Magento shop DEAR Inventory receives notification and creates sale order and invoice for selected products. Before the data exchange happen two systems must be configured to understand each other.

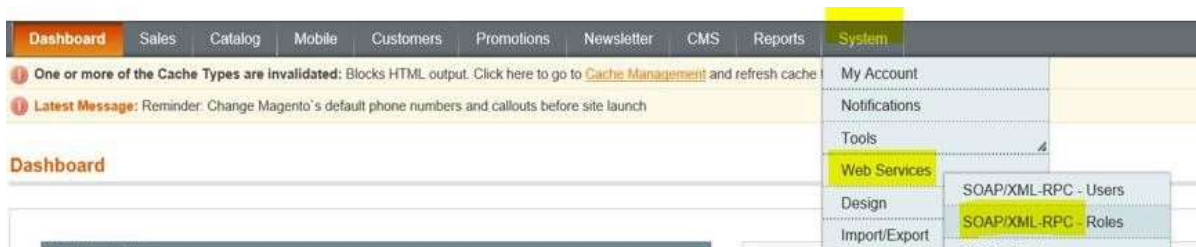
NOTE. DEAR Inventory integrates with Magento 1.7, 1.8 and 1.9. All documentation below relates to these versions of Magento.

Magento configuration

1. You will need access to Magento admin panel.



2. Create New Role in your Magento Store. Go to System->Web Services -> SOAP/XML-RPC – Roles.



You will see list of roles in your Magento shop. For new installation this list will be empty.



Click Add New Role and type DEAR in the Role name field



Then click on Role Resources and specify 'All' for Resource Access and click on Save Role button



3. Create a new User and assign to this Role. Go to System -> Web Services -> SOAP/XML-RPC - Users



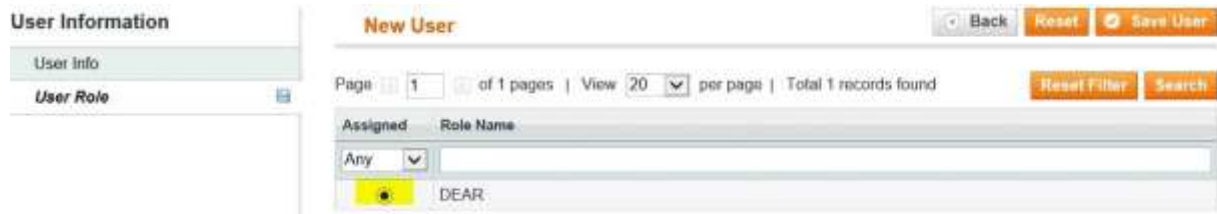
New User screen will appear. Click on Add New User button.



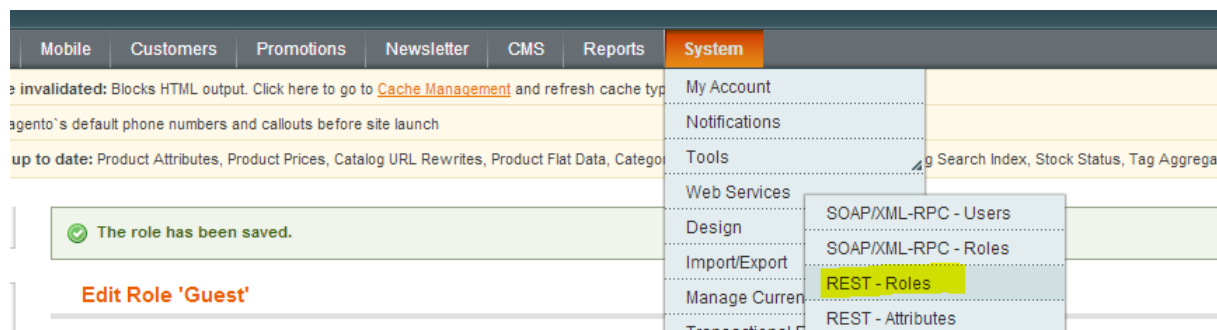
and fill details. All information is mandatory.



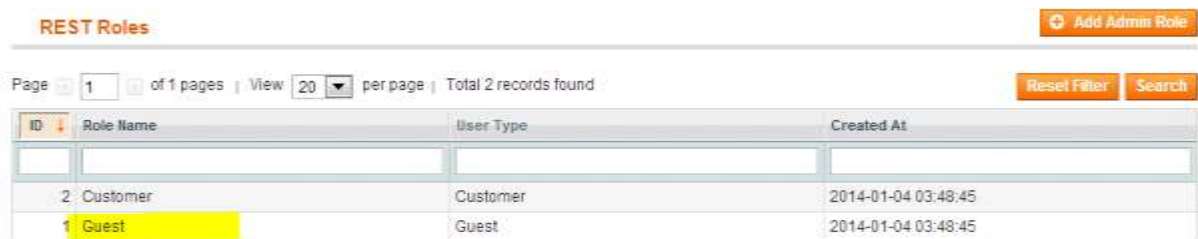
User Name and API Key will be required to integrate with DEAR Inventory. All other fields are just general information required for Magento user registration. Click on User Role on the left side and select role DEAR for this user. Click on Save User to save changes.



4. Update permissions for Guest role. Go to System -> Web Services -> REST -Roles



Role maintenance screen will appear. Double click on Guest role to start editing.



Change resource access to 'All'



DEAR Inventory configuration

Go to Integration -> Magento. Once you have selected menu item you will need to fill out the integration form.

[SETUP](#)
[CATALOG](#)
[BULK LISTING](#)
[PENDING ORDERS](#)
[LOG](#)

Tell us how to connect to your Magento store

*Your Magento store home page URL address

*Magento Username *i*

*Magento API Key *i*

*Consolidate orders

*Consolidation time *i*

*Customer *i*

*Invoice Lines Tax Rule *i*

*Invoice Additional Charges Tax Rule *i*

Pick, Pack and Ship processing mode *i*

Invoice Status *i*

Update stock levels in Magento

Location *i*

Download and install DEAR Magento extension

In order for DEAR Inventory to receive notifications about sales in Magento store, you need to install our Magento extension. Download and unzip it in your Magento store root folder.



Download and unzip it in your Magento store root folder.

Setup your carriers in DEAR

Magento only supports 5 carriers by default:

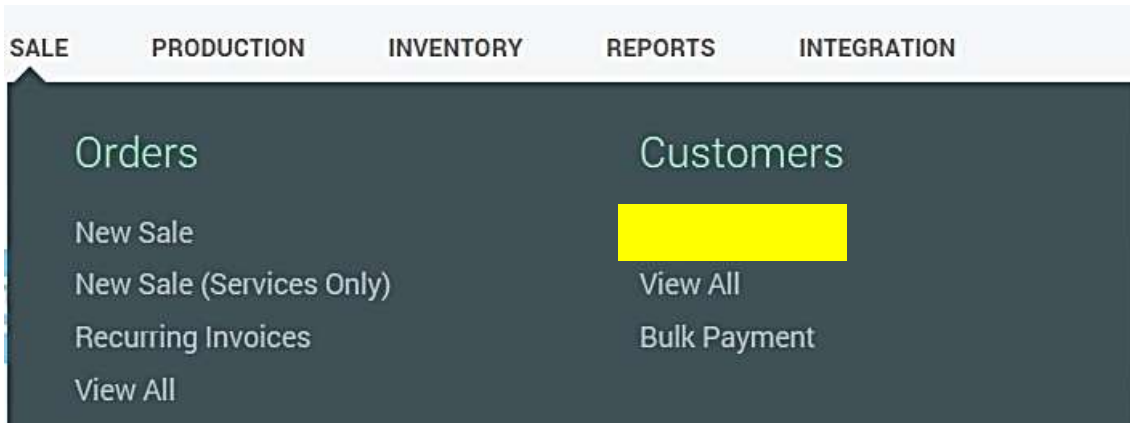
If you specify different carrier name in the Carrier field at Sale Task Shipment line, custom carrier will be used to create tracking information in Magento.

All fields are mandatory.

Your Magento store home page URL – is the front page URL.

Magento Username and Magento API Key - just created on previous steps user name and API key for Magento store.

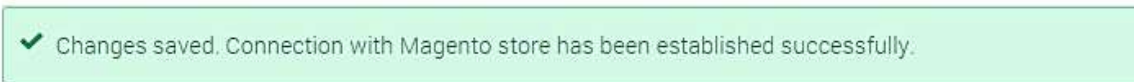
Consolidation Type can be 'Daily Consolidation' or 'No Consolidation'. 'Daily Consolidation' can be used when you don't want to keep every individual sale order from your Magento shop. In this case data will be consolidated into one single sale order/invoice and Consolidation Time has to be specified to let DEAR Inventory know when consolidation should be run. To keep data integrity you will need to specify Customer which will be used for all sale orders imported from Magento shop. To create customer you need to go to Sales->Customers->New Customer. Provide all mandatory information and save.



Update Stock levels in Magento – clear this checkbox you don't want to update stock levels in Magento.

Read the note about carriers you need to set up in DEAR in order to integrate with Magento list of carriers.

Once the form is filled you need to click on Save Changes button. DEAR will try to connect to your Magento shop. If all details are correct you will receive notification that connection is established.



DEAR Inventory extension for Magento

In order to Magento be able to send notification about product sales you need to download and install small extension.

1. Click on the link 'Download DEAR Magento extension' and save it on your local drive.
2. Upload the zip file to your root Magento shop folder and unzip the extension.
3. You may need to refresh cache System-> Cache Management in order to finish installation.


PublishingCatalog

DEAR Inventory has simple publishing mechanism when stock recorded in DEAR can be made available in your Magento shop. Go to Integration->Magento. You will see list of items recorded in your system.

Product	Price from	Available stock	Status	Ready for Magento
RS10016 : 10LBS FIRE EXTINGUISHER (R...	Tier 1	0	Listed	Yes
SA10135: 10% YELLOW 6	Tier 1	0	Listed	Yes
2023291: Acai Powder ORG	not specified	90	Not listed	Yes
2543407: Advertising Costs	not specified	0	Not listed	Yes
2023400: Agave Bottles	not specified	105	Not listed	Yes
2023401: Agave Bottles	not specified	-10	Not listed	Yes

'Ready for Magento' flag indicates if item can be sent to Magento shop. Every item has to have description, item image and default location specified. Click on item you would like to publish and specify price tier and attribute set details. If you already have Magento shop you can bring your data to DEAR Inventory by clicking 'Load products from Magento' button.

NOTE. Attribute set can't be changed later in Magento. You need to create all required attribute sets in Magento. DEAR will load and use it when publishing new inventory items.

MAGENTO PRODUCT MANAGEMENT 



You are managing product on Magento



SKU 2023260

Product Name SUP Cacao Paste



Available for sale 0

Status Not listed


 

Price 0.00

Manage product on Magento

Choosing any action will save all your changes before executing



Click on 'List on Magento' button to make the item available in your shop. This will create the link between your inventory item and the item listed on Magento. Every change in quantity will be reflected in both systems.



You are managing product on Magento

SKU Meet-Dave

Product Name Meet Dave

Available for sale -4

Status Listed

Short Description Meet Dave is a 2008 American family c *i*

* Price Tier Tier 1 *i*

Price 13.04

* Attribute Set choose... *i*

Manage product on Magento

Choosing any action will save all your changes before executing

Save Update on Magento Cancel

NOTE: If you need to delist your item, please use DEAR system function 'Remove from Magento'.

Monitoring your sales

Every time when your customer purchases something in Magento shop DEAR Inventory will receive notifications about this event. Magento Sale orders will be temporary kept in DEAR and, depending on your consolidation preferences, processed hourly or daily. You can see not processed orders in Integration->Magento-> Pending Orders tab. You can process pending orders manually by clicking on 'Process' button. As a result new sale orders will be created in DEAR Inventory. You will need to finalise them by completing packing and shipment instructions.

On Log tab you can see all Sale orders created for incoming requests from Magento shop. You can drill down by clicking on Sale task to see order details.

SETUP CATALOG BULK LISTING PENDING ORDERS LOG

Refresh Reset Layout Type text

Date	Order / Credit Memo ID	Status	Type	Sale Task
02/05/2015 15:11:41	100000072	Processed	Sale Order	SO-00033
02/05/2015 15:11:39	100000071	Processed	Sale Order	SO-00032
02/05/2015 15:11:37	100000070	Processed	Sale Order	SO-00031
02/05/2015 15:11:34	100000069	Processed	Sale Order	SO-00030
02/05/2015 15:11:33	100000068	Processed	Sale Order	SO-00029
02/05/2015 15:11:31	100000067	Processed	Sale Order	SO-00028

Order Workflow

