EC Internet

IMan Magento Connector User Guide

Version 1.2.3

Copyright 2015 EC Internet. All rights reserved.

Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement or nondisclosure agreement. The software may be used or copied only in accordance with the terms of those agreements. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or any means electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of EC Internet.

EC Internet
1682 Novato Boulevard, Suite #254
Novato, CA. 94947
888-343-2001

THIS USER GUIDE WAS CREATED USING MADCAP FLARE.

CONTENTS

CHAPTER 3

CHAPTER 4

CHAPTER 1

Overview

Setting up the Magento Connector is a moderately technical but straightforward task. If you've used IMan before initial setup of the Magento Connector can take as little as a half an hour. If you haven't, there are a number of resources available to you to help you get started.

In the below section, you'll find general setup guides for Magento, IMan, and the Magento Connector for IMan, as well as links to further IMan specific documentation and use cases for the Magento Connector with examples. For those already well versed in IMan and Magento, initial setup is as follows:

1. Install the EC Internet Magento Connector into IMan.
2. Install the RAPID Web Sync extension into Magento.
3. Create the API Role and API User in Magneto
4. Create your first job in IMan to pull from your ERP Software and push into Magento via the Magento Connector

Overview

Setting up the Magento Connector is a moderately technical but straightforward task. If you’ve used IMan before initial setup of the Magento Connector can take as little as a half an hour. If you haven’t, there are a number of resources available to you to help you get started.

In the below section, you’ll find general setup guides for Magento, IMan, and the Magento Connector for IMan, as well as links to further IMan specific documentation and use cases for the Magento Connector with examples. For those already well versed in IMan and Magento, initial setup is as follows:

1. Install the EC Internet Magento Connector into IMan.
2. Install the RAPID Web Sync extension into Magento.
3. Create the API Role and API User in Magneto
4. Create your first job in IMan to pull from your ERP Software and push into Magento via the Magento Connector

Common Configurations

Below is a list of common configurations made with IMan and the Magento Connector with RAPID Web Sync.

Local Sage, Remote Magento

The standard “Business server” setup. IMan and Sage existing on a single server, with Magento on its own server. This allows you to keep your business records secure under a firewall, and maintain a public store at the same time.

Local Sage, Local Magento

All-local setup. IMan, Sage, and Magento all residing on the same server. These setups are exclusive to Windows hosts.

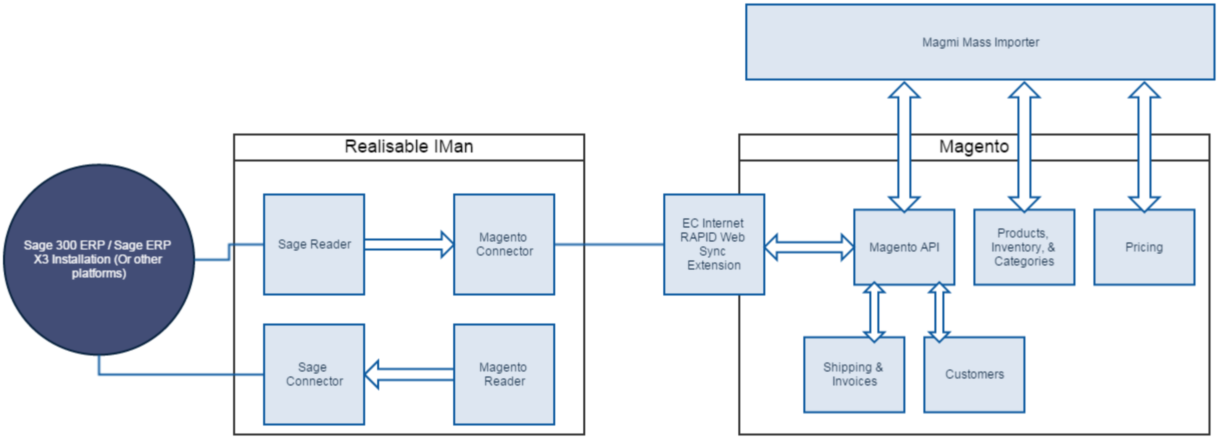
Remote Sage, Remote Magento

Allows for IMan to be installed on its own server. Sage and Magento can be on the same or different servers under this configuration, allowing for increased flexibility and security.

In all 3 above scenarios, only minor configuration changes in IMan are needed. A local connection uses the same resources and applications as a remote connection.

RAPID Web Sync™ Diagram

Below is a simplified diagram of how the entire RAPID Web Sync process works end-to-end.



IMan

Extensive IMan documentation and support is available at: **http://www.realisable.co.uk/support/kb**

This page intentionally left blank to ensure new chapters start on right (odd number) pages.

CHAPTER 2

Magento Setup

Quick Guide

Setup in Magento mainly involves plugin installations and minor configuration. Initial setup is as follows:

1. Install the RAPID Web Sync Extension directly or from Magento Connect.
2. Create the API Role for IMan.
3. Create a new API User for IMan.
4. Assign your created Role to your new User.
5. Setup lookup tables for transaction counters, codes lists, translation tables, ets.

You may also want to install Magmi for faster product updates. A guide for this is available at the end of this setup section.

Once this is done you'll be able to initiate your first sync jobs directly from IMan. See the sections below for more a more in-depth installation guide.

Additional information on Magmi, including troubleshooting and general installation help can be found on the Magmi Wiki (**http://wiki.magmi.org/**).

Magento Setup

Quick Guide

Setup in Magento mainly involves plugin installations and minor configuration. Initial setup is as follows:

1. Install the RAPID Web Sync Extension directly or from Magento Connect.
2. Create the API Role for IMan.
3. Create a new API User for IMan.
4. Assign your created Role to your new User.
5. Setup lookup tables for transaction counters, codes lists, translation tables, ets.

You may also want to install Magmi for faster product updates. A guide for this is available at the end of this setup section.

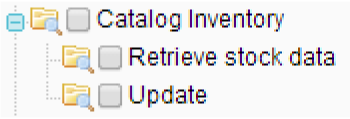
Once this is done you'll be able to initiate your first sync jobs directly from IMan. See the sections below for more a more in-depth installation guide.

Additional information on Magmi, including troubleshooting and general installation help can be found on the Magmi Wiki (**http://wiki.magmi.org/**).

Quick Guide

IMan setup is relatively simple once the initial install process is completed. In the sections below we've outlined the steps needed to prepare an existing IMan installation for RAPID Web Sync. Please see the end of section 2.1 for full IMan installation information.

Inventory Updates



Store IDs

Creating the API User

Go to System → Web Services → Users

If there is not already an API User setup, you can create one by clicking Add New User.

On the New User page, you will have to fill out the following form for the user:

Be sure to write down the User Name and API Key values.

You will need to enter these values in the connector setup in IMan.

Assigning API Users to Roles

You will now have to assign the newly created user to the previously created API Role.

This can be accomplished by clicking the radio button of the API Role you would like to assign to the user.

Installing Magmi

Magmi is one of the leading mass import tools for Magento, featuring lightning fast product imports, time-saving auto category generation features, multi-store imports, and safe defaults for products during imports. Magmi, along with the RAPID Web Sync, can save you countless hours.

Installing Magmi is fairly straight forward and easy to do, and many hosting companies offer

To start, you'll need the full Magmi installations files. These are available to download at: **http://sourceforge.net/projects/magmi/**

These files will need to be deployed to your Magento installation either remotely via FTP or locally depending on your environment. Extract the Magmi archive and copy the contents of it to the root of your Magento installation.

When complete, your installation should look like this:

Installing The EC Internet Magmi Full Indexer Plugin

Some versions of Magento will not require this step. See Appendix 1, Magento Versions for more information.

Importing products with Magmi will often require reindexing of your product data in Magento in order for them to appear on the site. EC Internet offers an extension to automate this produces. Upon completion of a RAPID Web Sync, Magmi will initiate a full reindex of your Magento site data automatically.

This plugin is packaged with the RAPID Web Sync extension for Magento. Extract the Magmi Full Indexer archive you received with your purchase of the RAPID Web Sync extension, and copy the “plugins” folder directly into your magmi folder on the server.

Your installation of the EC Internet Magmi Full Indexer plugin is now complete.

Configuring Magmi

You will now need to configure Magmi to access your Magento installation. This is done with the Magmi Web Interface, accessible via **your_magento_installation/magmi/web/magmi.php**.

Here you will be presented with a number of different settings panels. Under Configure Global Parameters, you will need to enter your Magento web server's SQL information.

By default, Magneto uses "magento" as the Database name, and the prefix is left as blank. Your situation may vary depending on how Magento was installed. Be sure to double check all parameters before saving or continuing.

For Magento installations later than 1.7.x, you will need to choose 1.7.x as your version in Magmi. Additional, your filesystem path for Magento should remain at the default of "../.."

Finally, enter your username and password for your SQL server. When done, your screen should resemble:

Click Save global parameters. Next you'll need to enable a few of the plugins Magmi comes with, and the one we installed prior. This can be done in the Configure Global Profile section.

Check the following plugins to enable them:

Magmi Optimizer v1.0.5

ECInternet Full Indexer v0.0.1 (Installed in above section)

On the fly category creator/importer v0.2.4

Tier price importer v0.0.9a

Click the Save Profile button at the bottom of the page. Your Magmi installation is now complete.

Installing the RAPID Web Sync™ Extension

The RAPID Web Sync Magento Extensive gives you inside knowledge and information on your sync jobs right from the Magento Administration Area, and makes the necessary changes to the Magento API to allow seamless integration with IMan through the IMan Magento Connector.

To download this extension, visit the Magento Connect page at: **http://www.magentocommerce.com/magento-connect/rapid-web-sync.html**

If you received this extension outside of purchasing it at Magento Connect, it can be installed directly by copying the app folder from the extension archive directly into the root of your Magento installation (Typically the public_html folder).

Installing the Sage Field Lengths Extension

The Sage Field Limits Extension for Magento ensures that any data imported from your site is compatible with the SQL structure found in Sage 300 or Sage X3. Additionally, this plugin allows you to manually configure all of the field lengths to comply with SQL changes made in Sage, or other ERP platforms.

To download this extension, visit the Magento Connect page at:

http://www.magentocommerce.com/magento-connect/field-compatibility-for-sage-300-erp-and-sage-erp-x3.html

If you received this extension outside of purchasing it at Magento Connect, it can be installed directly by copying the app folder from the extension archive directly into the root of your Magento installation (Typically the public_html folder).

Establishing Magento Access

Creating API access in Magento is the first step in the setting up the Magento Connector.

API access will need to be configured before IMan can communicate with the Magento web store.

A Magento Role must be created by an admin-level user. This role will be assigned Resources, such as Customers, Invoices, and Products that will be read or updated by the Magento Connector. The Admin-level user will also create a Magento API User that is associated with the Role.

Creating the API Role

You will need access to the Admin section of Magento in order to set this up. Here are the screens you will use to create the role,

Go to System → Web Services → SOAP/XML-RPC - Roles

If there is not already an API Role set up, you can create one by clicking Add New Role.

After clicking Add New Role, you will need to enter a “Role Name”:

After setting a Role Name, you will have to assign Role Resources. You can access this screen by clicking Role Resources which is under Role Information on the left side of the screen:

Resource Access will be set to “All” for typical installations. You have the option of limiting API access to only essential data types.

Limiting API Access

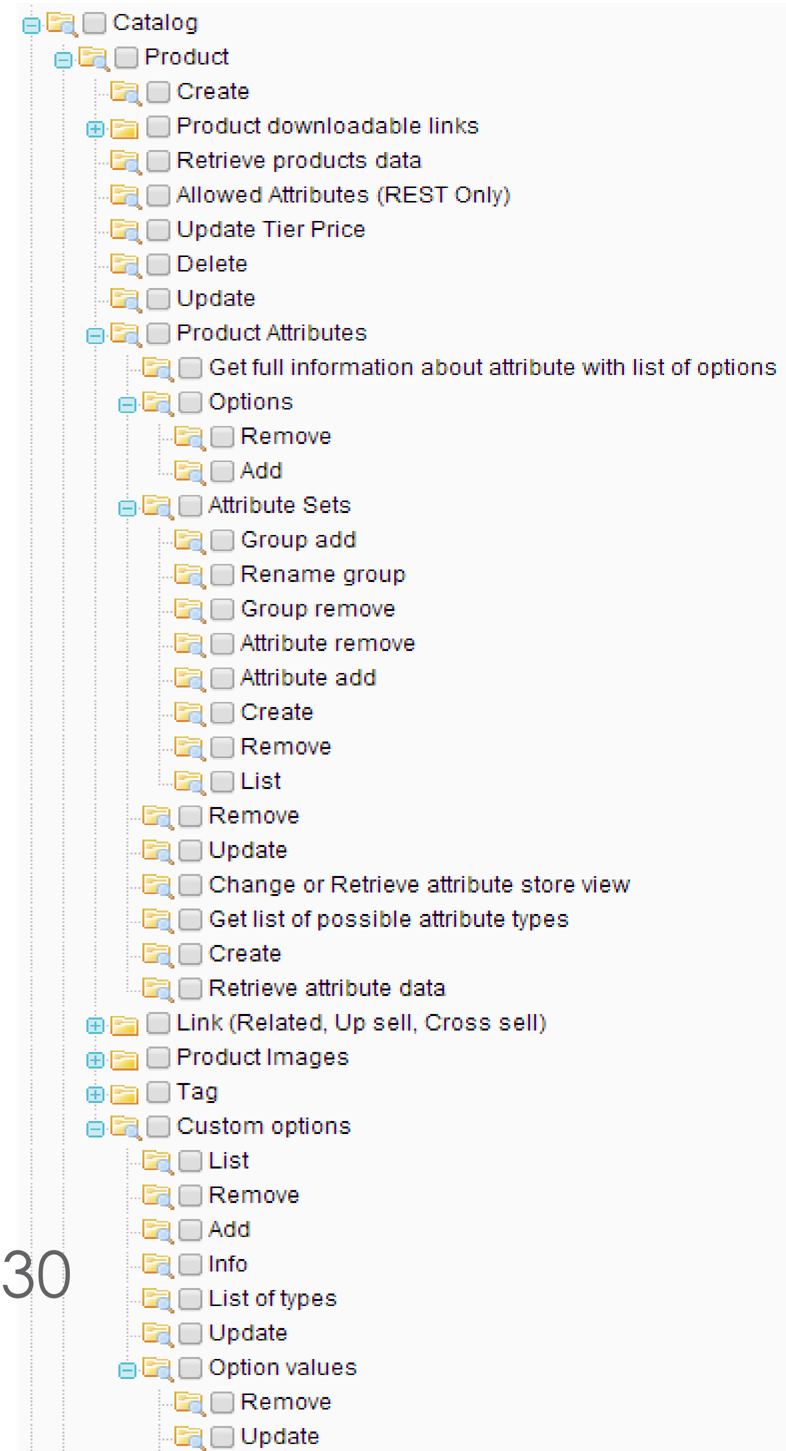
Magento supports limiting access by data type and operation. This is only required where data access is limited to certain organizations.

Customers

Order-level Access

- Sales
  - Order
    - Order credit memo
      - Retrieve credit memo list
      - Retrieve credit memo info
      - Cancel
      - Comments
      - Create
    - Order invoice
      - Cancel
      - Retrieve invoice info
      - Void
      - Capture
      - Comments
      - Create
    - Order shipments
      - Retrieve shipment info
      - Tracking
      - Comments
      - Create
    - Retrieve orders info
    - Change status, add comments

Catalog Products


Catalog
Product
Create
Product downloadable links
Retrieve products data
Allowed Attributes (REST Only)
Update Tier Price
Delete
Update
Product Attributes
Get full information about attribute with list of options
Options
Remove
Add
Attribute Sets
Group add
Rename group
Group remove
Attribute remove
Attribute add
Create
Remove
List
Remove
Update
Change or Retrieve attribute store view
Get list of possible attribute types
Create
Retrieve attribute data
Link (Related, Up sell, Cross sell)
Product Images
Tag
Custom options
List
Remove
Add
Info
List of types
Update
Option values
Remove
Update

CHAPTER 3

IMan Setup

This section covers general configuration and installation of the Magento Connector and Reader in IMan. For full IMan installation, please refer to the IMan user manual.

IMan Setup

This section covers general configuration and installation of the Magento Connector and Reader in IMan. For full IMan installation, please refer to the IMan user manual.

Required Files

Copy the below three files into the Addins folder of your IMan installation:

ECInternet.Connectors.Magento.dll

CookComputing.XmlRpcV2.dll

Ez.Newsletter.MagentoApi.dll

Creating the System Connector Record

After adding the files to the Addins folder, you can create the System Connector to that particular Magento web store.

Navigate to Setup → System Connectors.

Field	Notes	
System ID	The internal Id of system connector.	
System Type	Set to “Magento Connector”	
Description	A description of the connection.	
Connection String	[Magento Install] /index.php/api/xmlrpc	May vary.
Username	Magento API User Name	
Password & Confirm	Magento API Password (API Key)	
Company	Not used.	

Enabling Logging for Magento Connector

Enabling logging will provide detailed information as a sort of trace through the logic which is happening behind the scenes. They can also be useful in debugging issues with the Magento Connector.

To enable logging, navigate to the IMan directory, and go into the Config folder. Open the file appconfig.xml and add the following line:

<OPTION name=”MAGEDEBUG” value=”true” />

This page intentionally left blank to ensure new chapters start on right (odd number) pages.

CHAPTER 4

This will enable logging which will write to [IMan Directory]/Debug/MagentoLog.txt

Lookup Tables

Lookup Tables are what IMan uses to pull data back from other sources. In this section, we'll be covering the creation of Lookup Tables for your Magento installation in order to retrieve credit memos, invoices, and shipments for use in your ERP platform of choice.

This will enable logging which will write to [IMan Directory]/Debug/MagentoLog.txt

Lookup Tables

Lookup Tables are what IMan uses to pull data back from other sources. In this section, we'll be covering the creation of Lookup Tables for your Magento installation in order to retrieve credit memos, invoices, and shipments for use in your ERP platform of choice.

Overview

When processing orders from Magento in a typical integration, the user will pull the orders from Magento into their accounting package, and then update Magento with a new Order Status which effectively marks these orders as “processed.”

There are a few downloadable “types” which do not have a mechanism such as “Order Status” to mark these records as processed. To overcome this, an internal counter is kept which will store the last record which was successfully downloaded from Magento.

Note: This table will only be updated if the user is running the job through the Scheduler page. Stepping through the job through the IMan Palette will not update this table.

Setup

Go to your IMan Setup screen. Under VBScript & Lookups, click the Lookup Tables link.

Create a new Lookup Table with an ID of “ECIMAG”, and a meaningful Description.

There will be three fields which will need to be created: “Last Number”, “Last Retrieve Date Time” and “Message”.

Last Number

Last Retrieve Date Time

Message

Viewing Results

You can view the results of the Lookup Table by clicking the “Lookup Table Maint” link under “VBScript & Lookups” on the Setup page.

This is what the Lookup Table looks like for a multi-store Magento setup:

The Lookup Key will be a unique string made up of the following:

“MAGE3” – The System Connector Id for the Magento installation.

“CRM” / ”INV” / ”SHIP” – The downloadable type:

“CRM” – Credit Memo

“INV” – Invoice

“SHIP” – Shipment

With the last part of the description matching the Store ID in a Multi-Store Magento install. Single-store Magento installations will always return 0.

The Lookup Result will have a value of “Success” if this System Connector / Downloadable Type / Store Id combination has been downloaded prior.

The Lookup Result will have a blank value if this System Connector / Downloadable Type / Store Id combination was tested for any new records and none were found. There are two scenarios where this would happen:

1. The user specifies a Store Id value when setting up a download which does not have any records of that particular Downloadable Type.
2. The user does not specify a Store Id value when setting up a download. In this case, the Magento Connector will query the Magento API for a list of all Stores in a particular Magento installation, and iterate through each of them, downloading the records.

In both of the above scenarios, a record will be added to the table. Clicking into the record will show the following data:

Clicking on a particular record – in this case “MAGE3-CRM-1” will show the following data:

Here is a breakdown of the data you see on this page:

Last Number	The increment_id value of the last successfully processed Credit Memo.

Last Retrieve Date	The date/time of the last time this job ran successfully.
Message	A simple message informing the user of the Credit Memos being downloaded.

My Appendix Title

Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.

	1st Head	2nd Head	3rd Head	4th Head	5th Head	6th Head	7th Head	8th Head	9th Head	10th Head
General text	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗

	1st Head	2nd Head	3rd Head	4th Head	5th Head	6th Head	7th Head	8th Head	9th Head	10th Head
for a table										

	1st Head	2nd Head	3rd Head	4th Head	5th Head	6th Head	7th Head	8th Head	9th Head	10th Head
General text for a table	✓	✓	✗	✗	✓	✓	✓	✗	✗	✓
General text for a table	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓
General text for a table	✓	✓	✗	✓	✗	✗	✓	✗	✗	✓

	1st Head	2nd Head	3rd Head	4th Head	5th Head	6th Head	7th Head	8th Head	9th Head	10th Head
General text for a table	✓	✓	✗	✓	✗	✗	✗	✓	✓	✗
General text for a table	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓
General text for a table	✓	✓	✗	✗	✓	✓	✓	✗	✗	✓

	1st Head	2nd Head	3rd Head	4th Head	5th Head	6th Head	7th Head	8th Head	9th Head	10th Head
General text for a table	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗
General text for a table	✓	✓	✗	✗	✓	✓	✓	✓	✓	✓

B

Batch target

A special target that lets you build and/or publish multiple other targets in a single group (or "batch"). You can schedule batches to run at any time.

Block snippet

A snippet that is created out of one or more paragraphs.

C

Condition tag

A marker that you can apply to different areas of your content so that some sections show up in some of your outputs but not in others.

Cross-reference

A navigation link that lets you connect text in one topic to another topic (or a bookmark within a topic). Cross-references let you create "automated" links that are based on commands you provide. This allows you to keep links consistent and change them in just one place by using the "xref" style.

D

Drop-down text

A feature that lets you "scrunch up" content in your topic. The content is expanded (and therefore displayed) when the end user clicks a link.

F

Footnote

A comment that is used to explain a specific area of the text. Both the area in the text and the comment contain a number or symbol that ties the two together. A footnote (or endnote) comment can be placed at the end of a page, document, chapter, section, or book.

S

Single-Sourcing

"Single-Sourcing" is a fancy term that means something very simple—to produce multiple outputs from one source.

Snippet

A pre-set chunk of content that you can use in your project over and over. Snippets are similar to variables, but snippets are used for longer chunks of content that you can format just as you would any other content in your topic. In snippets, you can also insert tables, pictures, and whatever else can be included in a normal topic.

Span

A tag that is used to group inline elements to format them with styles. A span tag doesn't perform any specific action; it simply holds the attributes (e.g., font size, color, font family) that you apply to inline content.

Style

An element that contain pre-set formatting properties. You can apply style classes to your content to change the way it looks. Using style classes instead of direct (or "inline") formatting helps you work faster, more efficiently, and with more consistency in your topics. If you need to make changes to the formatting in the future, you do not need to change the formatting in each topic (as you would with direct formatting). Instead, you only need to change the formatting properties for that style in the appropriate stylesheet.

T

Table

A group of intersecting columns and rows that you can add to a topic for various purposes, such as comparing one thing with another or giving field descriptions for a software dialog.

Target

One "instance" of an output type. When you build your final output, you are essentially building one or more of the targets in your project.

Text snippet

A snippet that is created out of a portion of one paragraph.

Topic

A chunk of information about a particular subject. Topics are the most important part of a project. Everything else is contained within topics (e.g., hyperlinks, text, pictures) or points toward topics (e.g., table of contents, index, browse sequences). The very reason end users open a Help system is to find information, a little direction. They find that help within individual topics.

V

Variable

A pre-set term or content that you can use in your project over and over. Variables are similar to snippets, but variables are used for brief, non-formatted pieces of content (such as the name of your company's product or your company's phone number). There are different kinds of variables: (1) those you create, (2) system variables, (3) Heading variables, or (4) Running HF variables for page headers and footers in printed output.

X

XML Editor

The window in the Flare interface where you can add content and formatting to elements such as topics and snippets.

This page intentionally left blank to ensure new chapters start on right (odd number) pages.

Setup

This section covers the installation and configuration of all extensions, applications, and modules needed to get your RAPID Web Sync up and running.

Setup

This section covers the installation and configuration of all extensions, applications, and modules needed to get your RAPID Web Sync up and running.