



How to install the Magento 2 extension / Magento documentation pack

Summary

DSYNC is a system integration platform that specializes in synchronizing order data, customer data and product data between multiple applications. DSYNC is used to synchronise multiple applications with the Magento product including inventory platforms, accounting platforms, email, point of sale and loyalty.

FAQs and developer resource pack:

For the DSYNC application to function we require a simple extension to be applied to the Magento 2 website. The DSYNC team have been part of the Magento community for approx 8 years and can help out with any questions or support required.

What does the extension do?

The extension helps to trigger actions taken in Magento 2 for interaction with other applications. DSYNC is mostly used for creating new products, amending customer details in multiple applications, synchronizing CSVs with the Magento application.

Does the DSYNC Magento application have a process queue to monitor results of data sent? Yes within the DSYNC tab results and error reporting can be clearly seen in the DSYNC process queue.

Can DSYNC install the Magento 2 extension for you? Yes we can - however we will need your help to complete our Client install form. Please help to email our friendly team for a copy and we will help to get things set up for you.

Can the DSYNC team help with mapping to other systems? Yes we offer complimentary set up and support for basic integrations. We will just need some additional support with completing our client install form.

What are some of the common data entities moved to and from Magento? We work with many Magento clients to move data entities such as Product, Product Attributes, Inventory, Order, Order, Comment, Customer, Customer Address, Shipment, Shipment Comment.

What are some of the common systems DSYNC can link Magento to? DSYNC can link multiple applications including but not limited to (As we are constantly expanding)... Revel systems, Unleashed inventory, SAP products, Mailchimp, ZOHO, Salesforce, Netsuite, Vend, Pipedrive and many more applications. We can even link to Magento 2 if you are looking to transition.

Does DSYNC have a Magento 1 extension? Yes we have a separate Magento 1 extension please talk to the team or follow the wizard on our dashboard to obtain the Magento 1 extension.

Can DSYNC build a connection to another application if the connector does not exist? Yes we do offer professional services to build new connectors. Please help to talk to our sales guys.

How does payment work? DSYNC is a SaaS application with plans offered monthly. Payment is to DSYNC and starts from \$25 usd per month. Our sales team can also provide estimates to you based on your transactional data.

How much does the connector cost? Our starter plan for Magento starts at \$25 usd per month and allows up to 2.5 GBs of data. The next plan is \$100 per month and allows up to 10 GBs of data. With our Junior plan, your monthly data allowance is 2.5GB (Gigabytes) which translates to roughly 2,621 files (JSON, CSV, Excel, etc). The junior plan is perfect for smaller cafes and breweries. Our sales team can also provide estimates to you based on your transactional data.

How do I know how much data I am using? Within the DSYNC dashboard there is a data counter that shows your daily and monthly usage. This feature is available via your free trial.

What versions of Magento 2 is DSYNC compatible with? Version(s): v2.x CE & EE

What is the process to get started?

Overview of the process before the technical details for installation.

Option 1 Self install: [Sign up to DSYNC](#)

1. Follow the DSYNC dashboard wizard to setup Magento you will be able to download the correct Magento 1 or 2 extension from within the DSYNC application. If you cannot locate the Magento extension please let our team know and we will email across.
2. Install extension : Then please follow the below technical instructions to install the extension and get set up from the Magento side.
3. You will need to create an API key in DSYNC. API KEYS are generated from the My Account section.
4. Create the system you would like Magento to talk to by adding the new system to the DSYNC dashboard. This will depend on the system you would like Magento to talk to. To create a new system you will need to visit the top right and add a new system from templates. Our wizard will help to guide you through the initial set up and authorisation stage.
5. Mapping - On your DSYNC dashboard you should see two separate systems with data attributes you will need to create a relation and map the two systems together using our Mapping engine for a complete overview of how to create a relation and the DSYNC mapping engine please refer [here](#).

If the above gets too complicated we are here to help you setup and map your systems!

Option 2 DSYNC install - [Sign up to DSYNC](#) - If your developer can install our extension using the below technical process then sensational we can then simply configure the mapping. DSYNC can still assist if this is not possible - However we will need help to complete the Client Setup Form. The DSYNC team will then coordinate the best time to finalize and test the integration. To obtain the forms to get started please email support@dsync.com or contact our team via the website.

Who is DSYNC and where are they based? DSYNC is an Australian company with sales teams based in New York and San Francisco. DSYNC's works with retailers, banks and hospitality verticals to synchronize disparate applications.

Dsync Connector Setup & Installation

Magento 2

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Installation

1. Enable the Magento config cache in System/Cache Management (if disabled).
2. Copy the Dsync module files to the root Magento folder (the directory structure will be setup already) with FTP, SFTP, or SSH access.
3. Run the command line to update the schema "php bin/magento setup:upgrade"
4. Compile dependency injection "php bin/magento setup:di:compile"
5. Confirm that the module is enabled "php bin/magento module:enable Dsync_Dsync"
6. Deploy static files (if using production site) with preferred method.
7. Logout and then log back into Magento admin.
8. Disable cache (if applicable).
9. Verify that the Dsync menu is visible and accessible in the Magento admin menu.

Setup

Once the module is installed it needs to be configured to work in system configuration.

Quick Start

1. Add the api key for this connector from Dsync in Dsync/Settings/General Configuration/Authorization Token.
2. Select the system type as "Stage" or "Production" and save the config.
3. Create the system in Dsync and with the associated api key.
4. Select entities that should be enabled in Dsync/Settings/Entity Synchronization.
5. Enable the module in Dsync/Settings/General Configuration/Enabled and then save.

System Configuration Explained

The configuration of the Dsync module can be accessed by Dsync/Settings or Stores/Dsync/Settings

General Configuration

In order to enable the module select "Yes" beside "Enabled". Enabling the module will allow background processes to start and enabled entities to synchronize. Only enable the module once the configuration has been complete.

The system type for the module can be set to "Stage" or "Production". A "Stage" type indicates that the system is in the testing phase and will not be using live data. The "Production" type indicates that the system is live with real data synchronization.

The authorization token that needs to be entered is the one that was associated with the system when it was created in Dsync.

The process notification grid is a list of processes that are running on a system. It is used to cancel or retry a synchronization that has not gone through properly. The multi-select within the general configuration allows a user to filter what is displayed on the grid based on the status of the process.

General Configuration

Enabled

Yes

[GLOBAL]

Enable or disable global Dsync synchronization.

System Type

Stage

[GLOBAL]

Set to "Stage" for a testing site or "Production" for a live site.

Authorization Token

[GLOBAL]

The authorization token associated with this system as generated in Dsync.

Process Notification Grid

Pending

Processing

Pending Retry

Pending Notification

Complete

Error

Unrecoverable Error

[GLOBAL]

Processes will be displayed on the Process Notification Grid based on the selected statuses.

Entity Synchronization

Entity synchronization is used to enable or disable certain entities within the Magento system to be synchronized. Disabled entities will not be updated from other systems and will not send synchronization requests when they are updated.

Entity Synchronization
Enable or disable entity synchronization.

Product Entity Enabled	Yes	[GLOBAL]
Inventory Entity Enabled	Yes	[GLOBAL]
Order Entity Enabled	Yes	[GLOBAL]
Order Comment Entity Enabled	Yes	[GLOBAL]
Shipment Entity Enabled	Yes	[GLOBAL]
Shipment Comment Entity Enabled	Yes	[GLOBAL]
Customer Entity Enabled	Yes	[GLOBAL]

Data Configuration

Enabling logging with turn on logging and create Dsync logs in the var/log directory of Magento. Logs will include destination and source requests/response as well as exceptions created by the module. Logs will not be automatically deleted when logging is disabled.

Enabling data cleaning will remove old Dsync process records from the database (i.e entries on the process notification grid). The amount of minutes that is specified will be the amount of minutes since the process was last updated and only “Complete” or “Unrecoverable Error” processes will be removed.

Data Configuration

Logging Enabled	Yes	[GLOBAL]
If enabled, any Dsync logs will be generated in var/log.		
Data Cleaning Enabled	Yes	[GLOBAL]
Data cleaning will automatically remove old Dsync records from this system.		
Minutes	60	[GLOBAL]
Records will be purged every X minutes.		

Background Processing

The Dsync Magento 2 connector has several processes that run in the background including retrying synchronization when an issue is encountered and cleaning up old process data saved in the database.

Background processing will be handled by the cron schedule in Magento 2. The Magento 2 cron schedule will schedule these processes to run at certain intervals with a server cron job starting the execution of the schedule.

The Dsync cron can be configured in Stores/Configuration/Advanced/System/Cron (Scheduled Tasks)/Cron configuration options for group: dsync as follows:

⌵ Cron configuration options for group: dsync

Generate Schedules Every	<input type="text" value="1"/>	[GLOBAL]
Schedule Ahead for	<input type="text" value="4"/>	[GLOBAL]
Missed if Not Run Within	<input type="text" value="2"/>	[GLOBAL]
History Cleanup Every	<input type="text" value="10"/>	[GLOBAL]
Success History Lifetime	<input type="text" value="60"/>	[GLOBAL]
Failure History Lifetime	<input type="text" value="60"/>	[GLOBAL]
Use Separate Process	<input type="text" value="Yes"/>	[GLOBAL]

For optimal synchronization, it is recommended to run Magento cron jobs every minute.

For details on how to setup cron jobs for Magento, please refer to the following:

<http://devdocs.magento.com/guides/v2.0/config-guide/cli/config-cli-subcommands-cron.html>

Creating an API Key in Dsync for the connector

1. Click "MY ACCOUNT"
2. Go to "API KEYS" and click "ADD KEY"
3. Enter a name for the key and click "ADD"

Associating an Api Key when creating a system

1. When creating a system click "Use connector"
2. Select an API Key that was created for the connector before continuing.

A guide to setting up Magento in your DSYNC dashboard

In this step by step tutorial, we will be demonstrating how to setup Magento version one and Magento two within your DSYNC dashboard and begin a basic mapping process. Before you add Magento to your DSYNC dashboard please help to install the DSYNC Magento extension. Please help to note we have a separate guide for installing your Magento extension. We also cater for DSYNC to install the Magento simply complete our Client Setup form and provide the appropriate details.

Once you have installed the extension please visit your DSYNC dashboard to get started. Both Magento extensions can be located within our dashboard or obtained from our support crew. The below process flow will show you how to generate and API key, set up Magento on your DSYNC dashboard, create a link (relation) between two systems and create a map for you to synchronize your data.

- 1) **Generate and API Key.** From the empty DSYNC dashboard the first thing you will need to do is to generate an API key. We use API keys to ensure the data is secure between each application. To login to your DSYNC dashboard simply sign up for a free [trial here](#)
 - The API key is generated from the “My Account Section”
 - Select “Create API key”
 - You can name your API key as any description – Example “Magento 1”
- 2) **Copy the key into your Magento website.** Once you have generated the API key – Simply copy and paste the key and go into your Magento website.
 - Visit Magento > **DSYNC section** then the **settings** section and apply the key into the “API KEY section”.
- 3) **Add the Magento site to your DSYNC dashboard.** Now that we have authorised Magento to talk to DSYNC we will need to add the Magento website to your DSYNC dashboard. The DSYNC dashboard is a canvas where you can map multiple systems and data points together.
 - From a blank DSYNC dashboard select “Use System Templates”
 - Select Magento from the dropdown list, then select “Add this System”
 - Enter API Key details. Now it is time to enter the authorisation details – Lets start by entering the API key. Earlier we made an API key and called it Magento 1.
 - Enter URL. We will also need to copy and paste the Magento URL and paste it into the DSYNC section. The Magento URL is simply the websites primary domain name.
 - Select save. Once you select save the process may take a few seconds – This is because we are retrieving data elements from your Magento website.

Your Magento site should be added to your DSYNC dashboard.

How to perform basic data mapping.

In this example, we will be showing a basic mapping technique showcasing how to map one data field to another. DSYNC can move multiple data entities however for this tutorial we will be mapping the “Customer” fields together. We have advanced mapping tutorials for combining data together and setting advanced rules. Please also see our you tube channel as we have created a video demonstrating this process.

The basic flow for data mapping includes:

- Creating a relation/link = specify from a high level your data flow
- Create a map
- Editing the map = Pairing the attributes
- Setting the data direction
- Turning the sync on

First, we will need to create a Relation (A link between two points)

An easy entity to start with is customer to customer, product to SKU as an example.

- **Click on the first data entity.** The first step is to click on the first data entity you would like to synchronize – For example “Customer”
- **Click Create Relation.** Once you have clicked on Customer then select “Create Relation”
- **Click on the second data entity.** Now click on the other endpoint in this case to make it easy we are updating customer to customer.
- **Name your relation (Link)** A box will automatically appear so you can name your system link. Once you have created your link (or relation) and named it you can

Begin the Mapping Process.

After you have created a link between two data points it is time to set- up a map.

- **Create a new Map.** Click on the line between the data point and select “New” to create a new map.
- **Name your Map.** Another Pop up will appear asking you to “Name your map “ – This is so you can easily identify all the maps you have between your different data entities. You can name your map anything you wish however it is a good idea to have standard naming conventions for later use.
- **Edit the map.** (Edit the link / relations) map and pair your data together. There may be systems where a customer is called a different name example “contacts”, this is not a problem and it can still be mapped. You can also map other items such as SKU and Product together. The purpose of the mapping engine is to pair one data entity to another. For this example, it will be easy as we are mapping similar data layouts. The intention is to map corresponding fields so the data can be synchronized On the Master or Source side there are required fields we need to pair Required fields have a tiny asterisk next to them, highlighted in red.
- **Drag and drop against the required fields:** Now that we have added them to the dashboard simply drag to match the fields with the right data. Then select “Save”. The DSYNC mapping engine can be used to transform data between multiple endpoints. Please see our advanced mapping tutorial to see some of the business rules that can be applied. TIP: Required fields are highlighted with a red Asterisk.
- **Set the data mapping for the reverse direction:** DSYNC is a bidirectional system – To pair the data in the reverse direction simply select the Reverse mapping arrows located at the top of the mapping section. To save time DSYNC have implemented a copy button – When selecting “Pairing Map” you can copy the existing mapping from one side to another.
- **Set the Direction of your Job.** Once you have named your map you can also set the direction of the data flow. We have set up the system to accommodate Master, Slave and Both.
- **Turn on the data sync.** The next step is to turn on this data sync – to turn on the data sync please select the small circle in the right corner to turn on the map. This completes the mapping of one field to another. For advanced mapping and transformation please see our Advanced mapping tutorials.