



*Drive your **ideas...***

i95Dev GP Connect User Manual

Table of Contents

1. Introduction.....	3
1.1. About this guide.....	3
1.2. Terminologies	3
2. Configuration and Setup	4
2.1. Enabling the Connector	4
2.2. Setting up the Connector	5
2.3. Setting up Connector notifications	5
2.4. Enabling Message Queue Report.....	6
2.5. Implementing Locale.....	6
3. Data synced between Magento and Dynamics GP.....	7
4. Magento admin dashboard.....	7
4.1. Customer	8
4.1.1. Email Address.....	8
4.1.2. Primary Address	8
4.1.3. Customer grid and information screen.....	8
4.2. Order	9
4.2.1. Custom order workflow	9
4.2.2. Pre requisite for invoice sync.....	10
4.2.3. Order grid and information screen.....	10
4.3. Product	11
4.3.1. Inventory & Tier Prices	11
4.3.2. Product grid and information screen	11
5. Message Queue Report in Magento.....	12
5.1. Sync status	12
5.2. Manual data sync.....	12
5.3. Clean up synced data	12
5.4. Viewing sync report and manually syncing data.....	12



1. Introduction

i95Dev GP Connect is a secure, scalable and an efficient way of integrating your Magento e-commerce and Microsoft Dynamics GP system without impacting the client’s existing workflows. i95Dev GP Connect is more than just information sync and helps you increase sales, reduce costs, improve operational efficiency, and provide superior customer experience thus enabling you to take your business to the next level.

The bidirectional information sync results in consistent data across the systems, which helps reduce the manual administrative work, improves efficiency, streamlines order fulfilment, inventory, return & refund, and more.

1.1. About this guide

The objective of the document is to help users understand i95Dev GP Connect features and its functionality. The document works on the premise that the reader is familiar with Magento and Dynamics GP ERP systems.

The manual is divided into the following parts:

1	Introduction	A note about the guide, and terminologies used.
2	Configuration and setup	Instructions to enable and configure i95Dev GP Connect
3	Information exchanged between Magento and Dynamics GP	List of data synchronized between Magento and Dynamics GP.
4	Magento admin dashboard	Changes made in Magento admin screens to view Dynamics GP information (like GP IDs, order status, etc.) associated with a record in Magento.
5	i95Dev message queue report in Magento	About report functionality in Magento to view sync status, and more.

1.2. Terminologies

- **Customer** - Customer details
- **Address** - Order details
- **Product** - Product detail
- **Order** - Order details
- **Invoice** - Invoice details
- **Shipment** - Shipment details
- **Connector** – i95Dev GP Connect
- **Magento admin** - Magento’s admin panel or web store’s backend



2. Configuration and Setup

Once i95Dev GP Connect is installed on your Magento system two tabs, i95Dev Connect Settings and i95Dev Message Queue Report, are added to the store configurations screen. Here you can configure settings related to i95Dev GP Connect and Message Queue report.

Note - This document is only for your reference. When GP Connect is installed, the i95Dev team takes care of installation and configuration of the connector.

i95Dev Connect settings tab is where you can manage all settings related to the connector and has the following four sections.

- i95Dev Extension
- i95Dev Connect Settings
- General Contact Info
- i95Dev Connect Notifications

i95Dev Message Queue Report tab is where you can manage all the settings related to the reporting functionality made available by GP Connect. The Message Queue report allows you to view the status of data syncing from Dynamics GP to Magento, manually sync the data which did not sync automatically, and more.

2.1. Enabling the Connector

The connector, when installed, is by default in disabled mode. For connector to start synchronizing data between Magento and Dynamics GP, it must first be enabled from the store configurations screen.

Follow the following steps to enable the Connector from Magento admin.

1. **Sign in** to your Magento admin dashboard.
2. Click **Store** in the left admin bar, then click **Configurations** in the Settings group.
3. Scroll down and expand **i95Dev Connect** tab in the left navigation pane as shown in Figure 1.
4. Click **i95Dev Connect Settings** and expand **i95Dev Extension** tab.

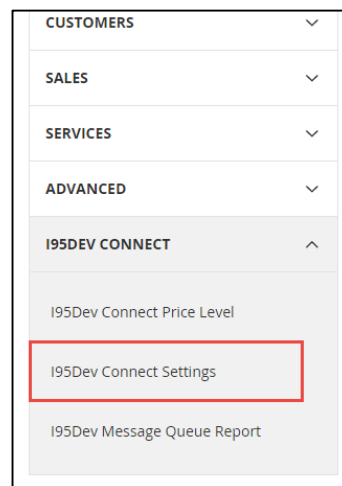


Figure 1: i95Dev Connect Settings in store configurations

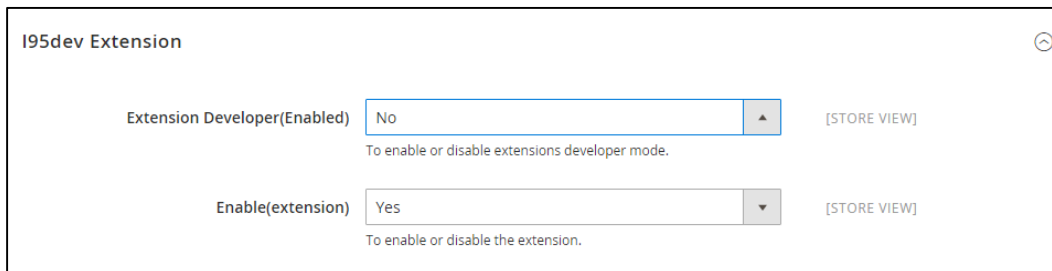


Figure 2: i95Dev Extension tab

5. Select **Yes** in the **Enable** drop-down list.

2.2. Setting up the Connector

1. Select **GP** in the **Component** drop-down list.
2. In the **Enable Customer Order Work Flow** drop-down list, select **Yes** if you would like to enable customer order workflow, else select **No**. For more information, see [Custom order workflow](#).
3. In the **Capture Invoice** drop-down list, select **Yes** if you would like to capture amount online, else select **No**.
 - a. **Note:** Only Authorize.net and PayPal payment methods are supported by default for capturing the amount online.
4. In the **Default Tax Class** drop-down list, select a Tax Class that is to be automatically assigned to a Customer Group that is synced from Dynamics GP to Magento.
5. In the **Default store** drop-down list, select the default store to which the customer, order and product records must be associated when they are synced from Dynamics GP to Magento.
6. In the **Default UoM** drop-down list, select the default UoM that will be assigned to the Products synced from Dynamics GP to Magento.

2.3. Setting up Connector notifications

1. In the **E-Mail Confirmations** combo-box select the records (multi-select, use ctrl key to select multiple) for which you wish you enable notifications.
 - a. **Invoice** When selected, a confirmation email is sent to customers after an invoice is generated in Dynamics GP.
 - b. **Shipment** When selected, a confirmation email is sent to customers after a shipment is created in Dynamics GP.

2.4. Enabling Message Queue Report

Message queue report in Magento admin dashboard enables you view data sync status for records synced from Dynamics GP to Magento. It also allows you to manually sync the records which did not sync automatically.

Refer [Message Queue Report in Magento](#) for more information.

Follow the following steps to enable message queue report from Magento configuration.

1. Click **Store** in the left admin bar, then click **Configurations** in the Settings group.
2. Scroll down and expand **i95Dev Connect** tab in the left navigation pane.
3. Click **i95Dev Message Queue Report**, as shown in Figure 3, to view the Message Queue Report Configurations screen.
4. Select **Yes** in the **Enable(extension)** drop-down list.

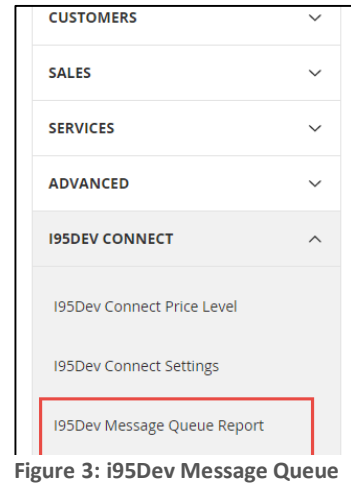


Figure 3: i95Dev Message Queue Report Configuration

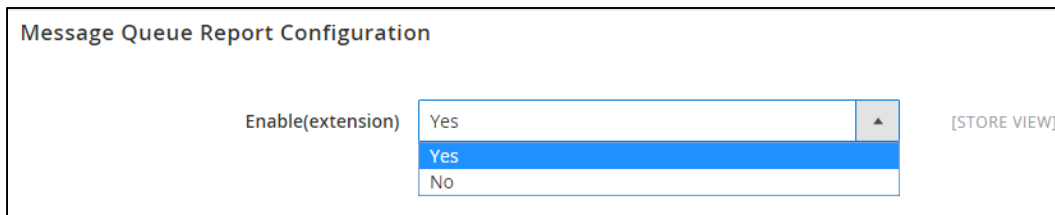


Figure 4: Message Queue Report Configurations

2.5. Implementing Locale

i95Dev GP Connect by default is implemented in English language which is configured using a CSV file. Follow the following steps to view custom fields and labels in your preferred language:

1. To display customer fields in your preferred language, download the English template, add preferred language, and upload the same to Magento FTP as shown below.

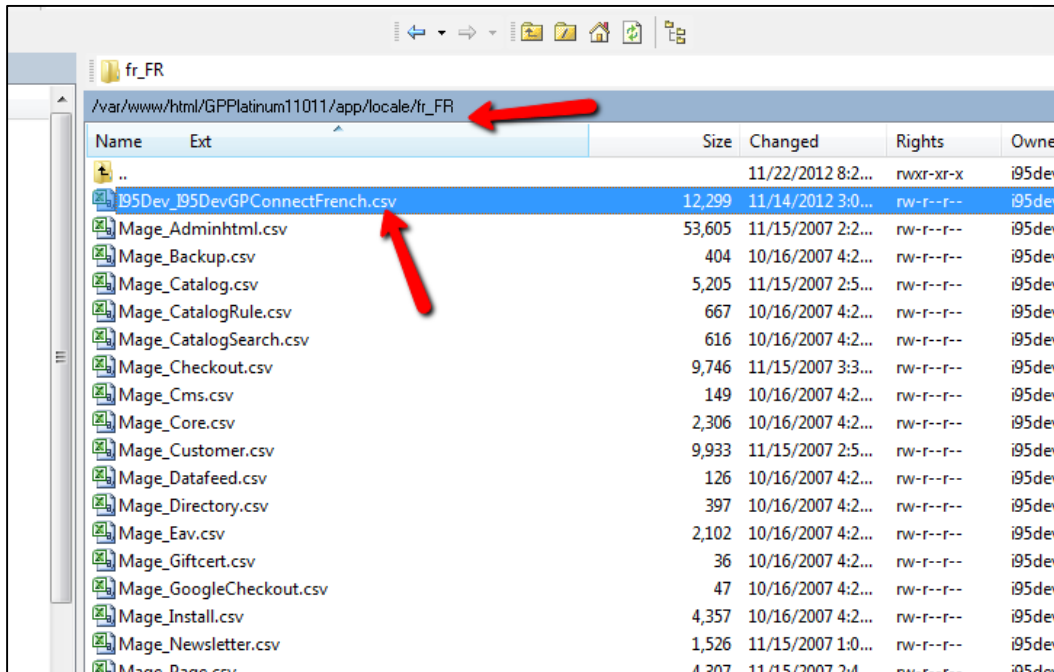


Figure 5: Locale implementation

3. Data synced between Magento and Dynamics GP

Connector by default synchronizes the following information between Magento and Dynamics GP

Element	Magento to GP	GP to Magento
Customer	Y	Y
Address	Y	Y
Product	Y	Y
Inventory	N	Y
Order	Y	Y
Shipping	Y	Y
Invoice	Y	Y
Order Status	Y	Y
Customer Group	Y	Y
Tier Price/ Price Level	N	Y
Credit Limit	Y	Y

4. Magento admin dashboard

In the Magento admin dashboard, you can view Dynamics GP information like GP record ID, order status, etc. for records synced between Magento and Dynamics GP.

4.1. Customer

4.1.1. Email Address

Customer email address is mandatory field in Magento, hence customer records created in Dynamics GP must have an email address. In cases where an email address is not available, the Connector automatically generates and assigns a dummy email address. This email address generated follows the following format:

gpcustomerid@companyname.com

In the above email address the **gpcustomerid** is the Customer ID given at the time of Customer creation in Dynamics GP and **companyname** is the name of the GP Company. This email id can be updated later.

4.1.2. Primary Address

As with email, primary address is mandatory in Magento. Hence a customer record created in Dynamics GP must have a primary address associated with the customer record for successful synchronization to Magento.

4.1.3. Customer grid and information screen

Once a Customer record is synced between Magento and Dynamics GP, you can view the GP Customer ID in Magento admin's Customer information screen.

We add two additional columns to Magento admin's Customer grid, Origin - to identify the originator (the source system where the record was created), and GP Customer ID – to display the primary identifier of the record in Dynamics GP to help correlate the records in Magento and GP.

This column displays origin of a Customer.

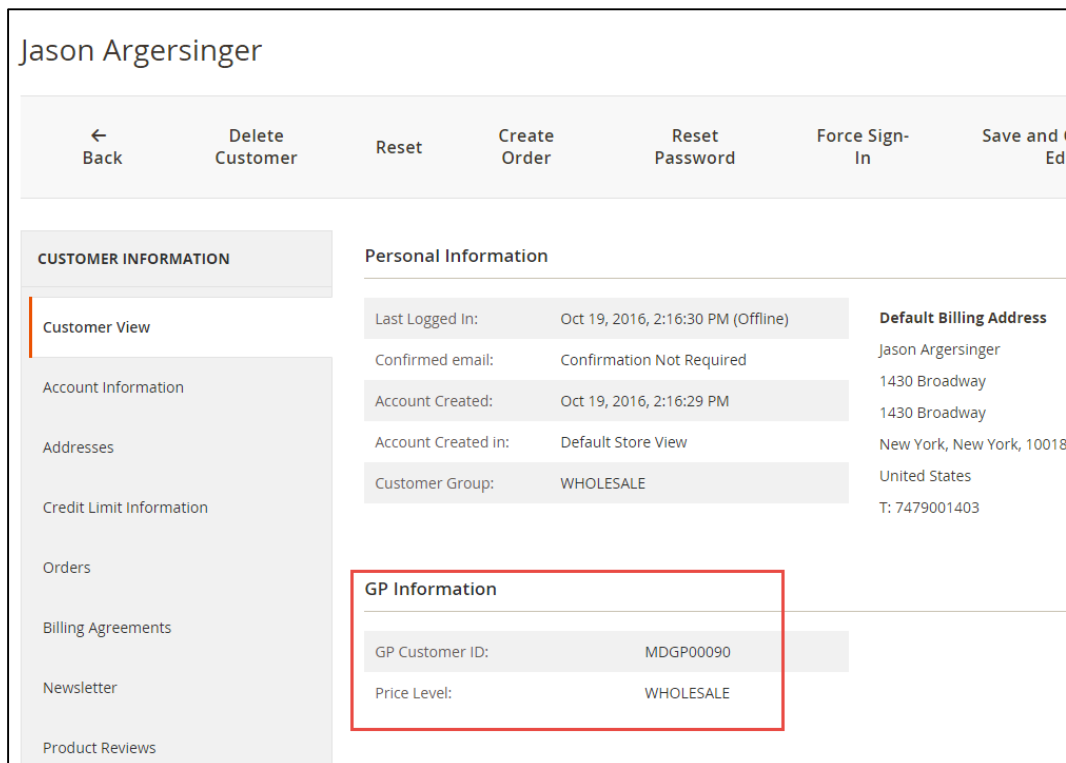
Here you can view the GP Customer ID, that is sent from Dynamics GP after successful sync.

<input type="checkbox"/>	Origin	GP Customer ID	ID ↑	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in
<input type="checkbox"/>	website	MDGP00090	152	Jason Argersinger	jason@example123.com	WHOLESALE	7479001403	10018	United States	New York	Oct 19, 2016 2:16:29 PM	Main Website	1	Default Store View
<input type="checkbox"/>	website	MDGP00088	151	Jennifer J. Rosales	jenniferrosales@teleworm.us	GENERAL	741258963	33610	United States	Florida	Oct 19, 2016 10:05:35 AM	Main Website		Default Store View
<input type="checkbox"/>	GP	DEMOM2CUST	150	Henry Brook	brrokhenry@test.com	GENERAL	7894563210	94666	United States	California	Oct 19, 2016 9:36:03 AM	Main Website		Default Store View
<input type="checkbox"/>	website	MDGP00086	149	jony Steve	jony@test.com	GENERAL	81222545454	94666	United States	California	Oct 19, 2016 9:26:25 AM	Main Website		Default Store View
<input type="checkbox"/>	website	MDGP00085	148	Matt Collins	matt@example123.com	WHOLESALE	8198497333	J1A 1R2	Canada	Prince Edward Island	Oct 18, 2016 5:51:13 PM	Main Website	1	Default Store View
<input type="checkbox"/>	GP	GPB2B1452	147	samuels krist	samuels_krist123@gmail.com	GENERAL	9878646490	94666	United States	California	Oct 18, 2016 2:44:03 PM	Main Website		Default Store View

Figure 6: Customer grid in Magento admin

Similarly, the Connector adds an additional GP Information section in the account Information tab. This section displays customer’s GP Customer ID and Price Level assigned (if any) to the Customer.

1. Go to the **Customer View** tab in the **Customer Information** screen.
2. Scroll down to the GP Information section to view Customer’s **GP Customer ID** and **Price Level**.



Jason Argersinger

← Back Delete Customer Reset Create Order Reset Password Force Sign-In Save and Edit

CUSTOMER INFORMATION

- Customer View
- Account Information
- Addresses
- Credit Limit Information
- Orders
- Billing Agreements
- Newsletter
- Product Reviews

Personal Information

Last Logged In:	Oct 19, 2016, 2:16:30 PM (Offline)	Default Billing Address
Confirmed email:	Confirmation Not Required	Jason Argersinger
Account Created:	Oct 19, 2016, 2:16:29 PM	1430 Broadway
Account Created in:	Default Store View	1430 Broadway
Customer Group:	WHOLESALE	New York, New York, 10018
		United States
		T: 7479001403

GP Information

GP Customer ID:	MDGP00090
Price Level:	WHOLESALE

Figure 7: Customer’s GP Information in Magento admin

4.2. Order

4.2.1. Custom order workflow

In Dynamics GP, there is a default work flow for Order fulfillment which has seven steps - New → Ready to Print/ Picking Ticket → Unconfirmed Pick → Confirm Pick/Ready to Pack → Ready To Ship → Shipped → Ready to Print/Post.

This default workflow requires Advanced Distribution Module in Dynamics GP, which is an additional cost for the client. Connector creates a custom order workflow that has only five steps, which eliminates the need for the Advanced Distribution Module. This allows you to generate invoice and shipment for an Order at any given point of time, unlike the Dynamics GP’s default Order fulfillment workflow mentioned above.

4.2.2. Pre requisite for invoice sync

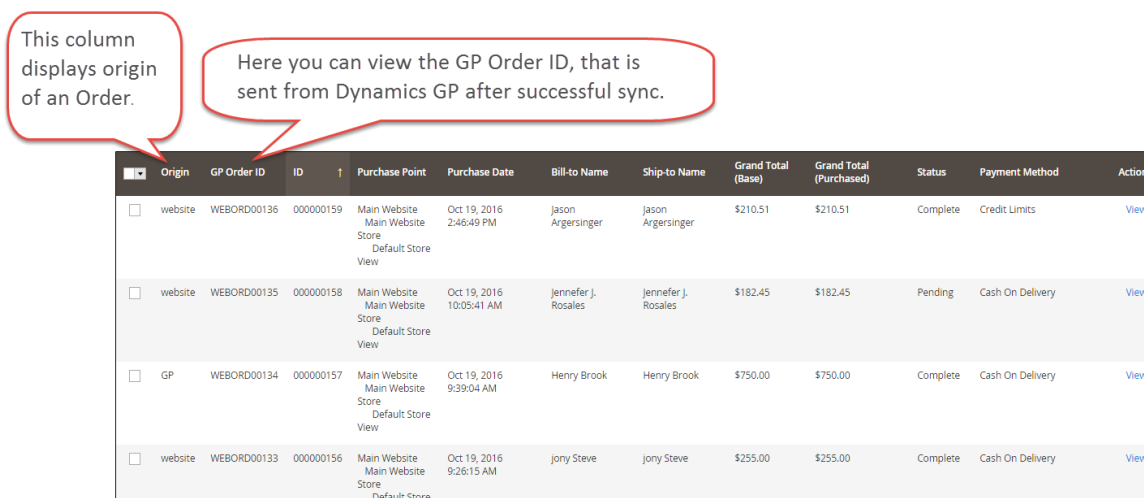
If you are using Dynamics GP’s fulfillment workflow then the Connector requires the following for successful Invoice sync from Magento to Dynamics GP.

- The Order must be shipped
- The Order status in Dynamics GP must be ‘Ready to Print/Post’.

Note: For the custom order workflow provided by the Connector, the above describe pre requisites are not mandatory.

4.2.3. Order grid and information screen

As with Customer grid, the same two columns are also added to the Order grid – Origin and GP Order ID.



This column displays origin of an Order.

Here you can view the GP Order ID, that is sent from Dynamics GP after successful sync.

	Origin	GP Order ID	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Payment Method	Action
<input type="checkbox"/>	website	WEBORD00136	000000159	Main Website Main Website Store Default Store View	Oct 19, 2016 2:46:49 PM	Jason Argersinger	Jason Argersinger	\$210.51	\$210.51	Complete	Credit Limits	View
<input type="checkbox"/>	website	WEBORD00135	000000158	Main Website Main Website Store Default Store View	Oct 19, 2016 10:05:41 AM	Jennifer J. Rosales	Jennifer J. Rosales	\$182.45	\$182.45	Pending	Cash On Delivery	View
<input type="checkbox"/>	GP	WEBORD00134	000000157	Main Website Main Website Store Default Store View	Oct 19, 2016 9:39:04 AM	Henry Brook	Henry Brook	\$750.00	\$750.00	Complete	Cash On Delivery	View
<input type="checkbox"/>	website	WEBORD00133	000000156	Main Website Main Website Store Default Store	Oct 19, 2016 9:26:15 AM	jony Steve	jony Steve	\$255.00	\$255.00	Complete	Cash On Delivery	View

Figure 8: Order grid in Magento admin

Similar to Customer information page, an additional section, GP Information, is also added to the Order information page. This section displays GP Order ID, Order Status and GP Invoice ID.

Similarly, the Connector adds an additional GP Information section in the account Information tab. This section displays customer’s GP Customer ID and Price Level assigned (if any) to the Customer.

1. Go to **Information tab** in the **Order View** screen.
2. Scroll down to the GP Information section to view Order’s **GP Order ID, GP Order Status and GP Invoice ID.**

Order & Account Information

Order # 000000159 (The order confirmation email was sent)

Order Date: Oct 19, 2016, 2:46:49 PM

Order Status: Complete

Purchased From: Main Website
Main Website Store
Default Store View

Placed from IP: 175.101.251.163

Account Information

Customer Name: Jason Argersinger

Email: jason@example123.com

Customer Group: WHOLESALE

GP Information

GP Order ID: WEBORD00136

GP Order Status: Completed

GP Invoice ID: WEBINV00057

Figure 9: GP Information of Order in Magento admin

4.3. Product

4.3.1. Inventory & Tier Prices

For inventory and tier prices, the Connector by default assumes the Dynamics GP system as the master. Hence, both the inventory and tier pricing information is synchronized only from Dynamics GP to Magento.

4.3.2. Product grid and information screen

Unlike Customer and Order grid where we add two columns, in Product grid we add one column – GP Product Status. Products successfully synced between Magento and Dynamics GP have status as “Synced”.

Synced status in this column shows that the Product created in Magento successfully synced to Dynamics GP.

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	GP Product Status	Action
40		Standard M	Simple Product	Default	30722-gdryl	\$500.00	10545.0000	Catalog, Search	Enabled	Main Website	Synced	Edit
45		Blouse B	Simple Product	Default	GPPROD001	\$157.00	196.0000	Catalog, Search	Enabled	Main Website	Synced	Edit
44		Tommy Hilf	Simple Product	Default	30723_thejt	\$220.00	9498.0000	Catalog, Search	Enabled	Main Website	Synced	Edit
43		Pioneer Ma	Simple Product	Default	PMTPO00001	\$250.00	546.0000	Catalog, Search	Enabled	Main Website	Synced	Edit
42		black jean	Simple Product	Default	black jeans	\$100.00	38.0000	Catalog, Search	Enabled	Main Website	Synced	Edit

Figure 10: Product sync status, from Magento to Dynamics GP

5. Message Queue Report in Magento

The Message Queue Report gives an overview of the status of data sync transactions happening from Dynamics GP to Magento. The sync status can be viewed for the following entities:

Customer	Product	Order	Credit Order (with Credit Limit)
Address	Tier Price/ Price Level	Invoice	Credit Schedule
Customer Group	Shipment	Finance Charges	Transaction History

This is a dynamic report; once the record has synced successfully there would be no records in the report section.

5.1. Sync status

The Connector assigns the following status to each record during various stages of the sync process

Pending	Status used for incoming data – once the Connector starts receiving a message (data of an entity) from Dynamics GP. At this stage, the data is received by Magento but yet to be synced.
Success	Status used for records, which are successfully synced to Magento.
Error	Status used when the Connector encounters an error during the sync process.
Complete	Status used when a record is successfully synced to Magento and the success notification is sent back to the Dynamics GP system.

5.2. Manual data sync

For every records that fail to sync to Magento (records with sync status “Error”), the connector attempts to re-sync the record five times. In the process, if the record successfully syncs then the status is changed to “Success” and then to “Complete” as discussed above. However, if the record fails to sync even after a pre-configured number of attempts, the automated retry process is stopped and will be removed from the message queue periodically (pre-configured).

Magento administrator can manually sync (after resolving the issue that is causing the automated sync to fail) or delete those records.

5.3. Clean up synced data

To avoid the message queue from getting overwhelming (to understand and in size), the Connector periodically (pre-defined) removes the data, with sync status “Complete” and “Error”, from the message queue.

5.4. Viewing sync report and manually syncing data

Please follow the following steps to view sync report and to manually sync records with sync status Error.

1. **Login** as administrator in **Magento admin** panel.

- Click **Reports** in the Admin sidebar → click **Message Queue Report** in i95Dev Message Queue group. The system displays the Message Queue Report screen.

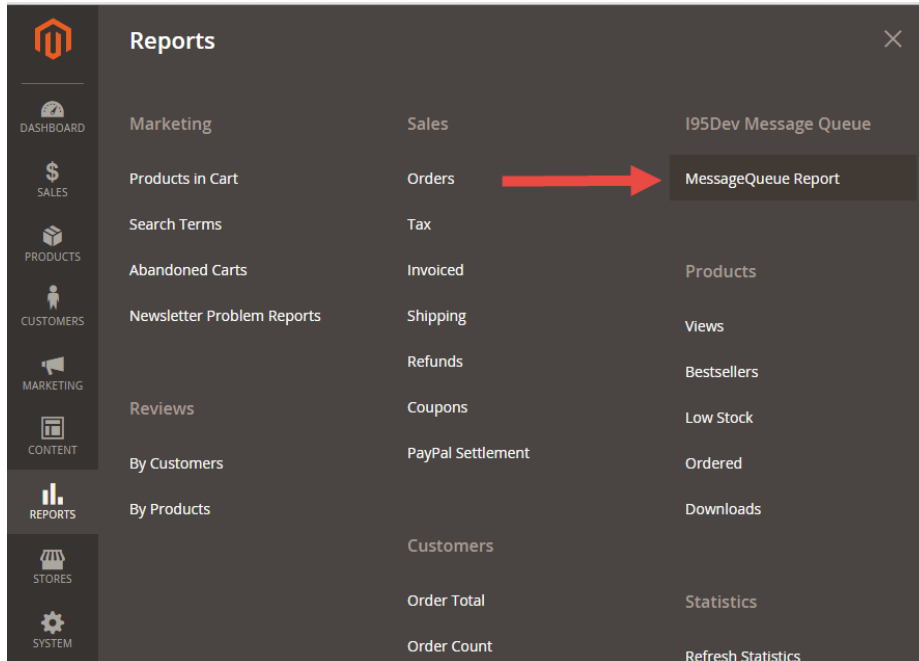


Figure 11: Navigation to Message Queue Report

- Select the entity type in **Entity Type** drop-down list for which you wish to see the sync report

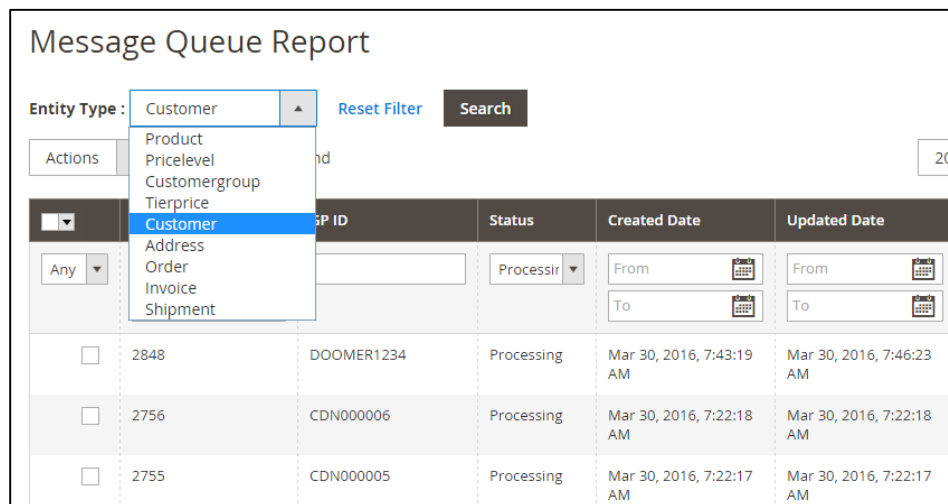


Figure 12: Entity Types in Message Queue Report

- To view records with sync status Error, select **Error** from the **Status** drop down list and click **Search**

Message ID	GP ID	Status	Created Date	Updated Date
From		Processing	From	From
To		Pending	To	To
2848	DOOMER1234	Error	Mar 30, 2016, 7:43:19 AM	Mar 30, 2016, 7:46:23 AM
2756	CDN000006	Success	Mar 30, 2016, 7:22:18 AM	Mar 30, 2016, 7:22:18 AM
2755	CDN000005	Complete	Mar 30, 2016, 7:22:17 AM	Mar 30, 2016, 7:22:17 AM

Figure 13: Entity Status in Message Queue Report

- Select all records (check box) you wish to sync manually and select **Sync** from the **Action** menu.