



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

## i95Dev AX 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 AX .....	7
4. Magento admin dashboard.....	7
4.1. Customer.....	7
4.1.1. Email Address.....	7
4.1.2. Customer grid and information screen.....	8
4.2. Order .....	9
4.2.1. Order workflow .....	9
4.2.2. Order grid and information screen .....	9
4.3. Product.....	10
4.3.1. Inventory & Tier Prices.....	10
4.3.2. Product grid and information screen.....	10
5. Message Queue Report in Magento .....	10
5.1. Sync status .....	11
5.2. Manual data sync.....	11
5.3. Clean up synced data .....	11
5.4. Viewing sync report and manually syncing data.....	11

## 1. Introduction

**i95Dev AX Connect** is a secure, scalable and an efficient way of integrating your Magento e-commerce and Microsoft Dynamics AX systems without impacting your existing workflow. i95Dev AX Connect is more than just information sync, it 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 this document is to help you understand i95Dev AX Connect features and its functionality. The document works on the premise that the reader is familiar with Magento and Dynamics AX ERP systems.

The manual is divided into the following parts:

1	Introduction	A note about this guide, and terminologies used.
2	Configuration and setup	Instructions to enable and configure i95Dev AX Connect.
3	Information exchanged between Magento and Dynamics AX	List of data synchronized between Magento and Dynamics AX.
4	Magento admin dashboard	Changes made in Magento admin screens to view Dynamics AX information (like AX 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 AX Connect
- **Magento admin** - Magento's admin panel or web store's backend

## 2. Configuration and Setup

Once i95Dev AX 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 AX Connect and Message Queue report.

**Note** - This document is only for your reference. When AX 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
- i95Dev Connect Notifications
- General Contact Info

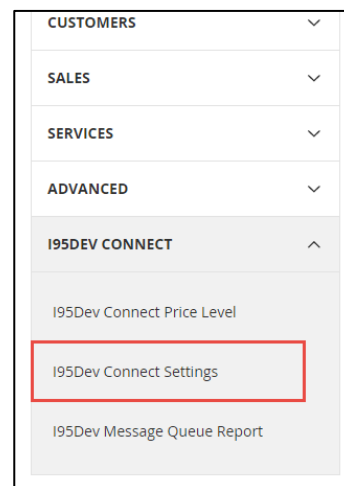
i95Dev Message Queue Report tab is where you can manage all the settings related to the reporting functionality made available by AX Connect. The Message Queue report allows you to view the status of data syncing from Dynamics AX to Magento, and it also allows you to manually sync the data which did 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 AX, 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 the **i95Dev Extension** tab.



**Figure 1: i95Dev Connect Settings in store configurations**

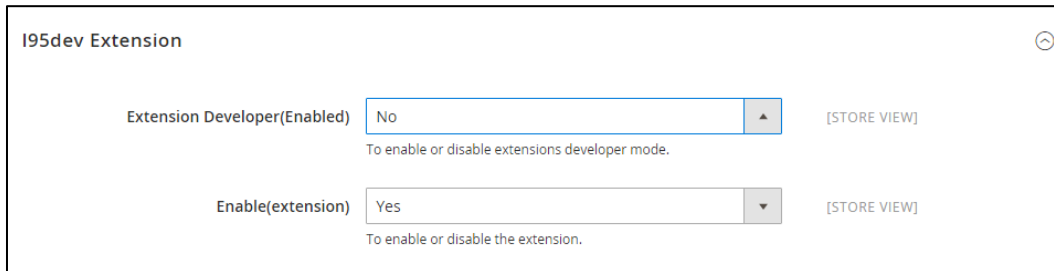


Figure 2: i95Dev Extension tab

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

## 2.2. Setting up the Connector

1. Select **AX** in the **Component** drop-down list.
2. In the **Capture Invoice** drop-down list, select **Yes** if you would like to capture amount online, else select **No**.

**Note:** Only Authorize.net and PayPal payment methods are supported by default for capturing the amount online.

3. 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 AX to Magento.
4. 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 AX to Magento.
5. In the **Default UoM** drop-down list, select the default UoM that will be assigned to the Products synced from Dynamics AX to Magento.

## 2.3. Setting up Connector notifications

1. In the **E-Mail Confirmations** combo-box select the records (use ctrl key to select more than one options) for which you wish to enable notification.
  - a. **Invoice** When selected, a confirmation email is sent to the customer after an invoice is generated in Dynamics AX.
  - b. **Shipment** When selected, a confirmation email is sent to the customer after a shipment is created in Dynamics AX.
2. In the **Order Total Mismatch Notification** drop-down list, select **Yes** if you would like to received email in the instance of order total mismatch, else select **No**.

## 2.4. Enabling Message Queue Report

Message queue report in Magento admin dashboard enables you to view data sync status for records synced from Dynamics AX 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.

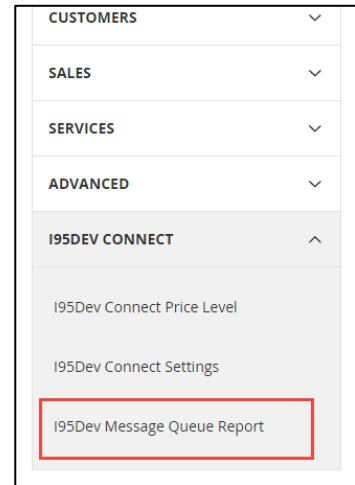


Figure 3: i95Dev Message Queue Report Configuration

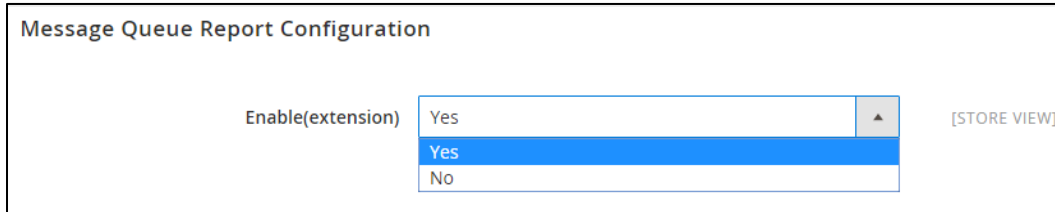


Figure 4: Message Queue Report Configurations

## 2.5. Implementing Locale

i95Dev AX 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 template, add preferred language, and upload the same to Magento FTP as shown below.

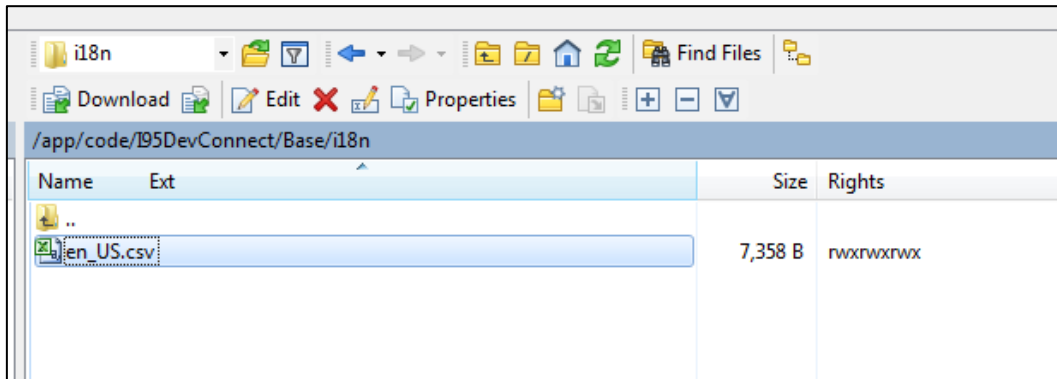


Figure 5: Locale implementation

### 3. Data synced between Magento and Dynamics AX

Connector by default synchronizes the following information between Magento and Dynamics AX.

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

### 4. Magento admin dashboard

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

#### 4.1. Customer

##### 4.1.1. Email Address

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

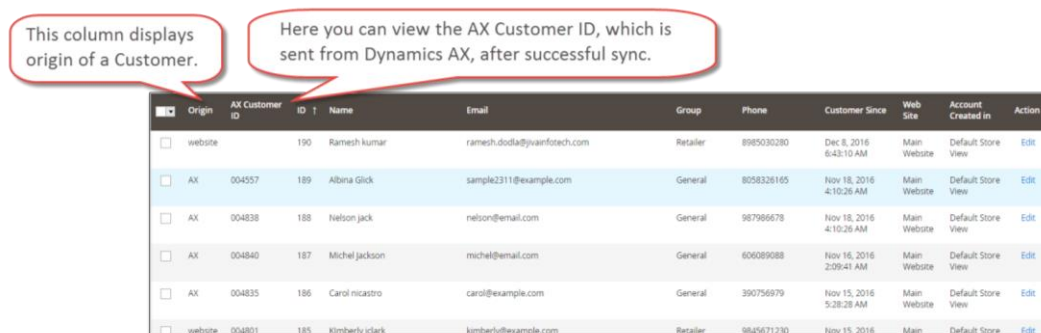
**axcustomerid@companyname.com**

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

#### 4.1.2. Customer grid and information screen

Once a Customer record is synced between Magento and Dynamics AX, you can view the AX 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 AX Customer ID – to display the primary identifier of the record in Dynamics AX to help correlate the records in Magento and AX.



Origin	AX Customer ID	ID	Name	Email	Group	Phone	Customer Since	Web Site	Account Created in	Action
website		190	Ramesh kumar	ramesh.dodda@jvairfotech.com	Retailer	8985030280	Dec 8, 2016 6:43:10 AM	Main Website	Default Store	Edit
AX	004557	189	Albina Glick	sample2311@example.com	General	8058326165	Nov 18, 2016 4:10:26 AM	Main Website	Default Store	Edit
AX	004838	188	Nelson jack	nelson@email.com	General	987986678	Nov 18, 2016 4:10:26 AM	Main Website	Default Store	Edit
AX	004840	187	Michel jackson	michel@email.com	General	606089088	Nov 16, 2016 2:09:41 AM	Main Website	Default Store	Edit
AX	004835	186	Carol nicastro	carol@example.com	General	390756979	Nov 15, 2016 5:28:28 AM	Main Website	Default Store	Edit
website		185	kimberly clark	kimberly@example.com	Retailer	9845671230	Nov 15, 2016	Main	Default Store	Edit

Figure 6: Customer grid in Magento admin

Similarly, the Connector adds an additional AX Information section in the account Information tab. This section displays customer’s AX 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 AX Information section to view Customer’s **AX Customer ID** and **Price Level**.



AX Information	
AX Customer ID:	004838
Price Level:	Not Available
Customer Tax Group:	Not Available

Figure 7: Customer’s AX Information in Magento admin



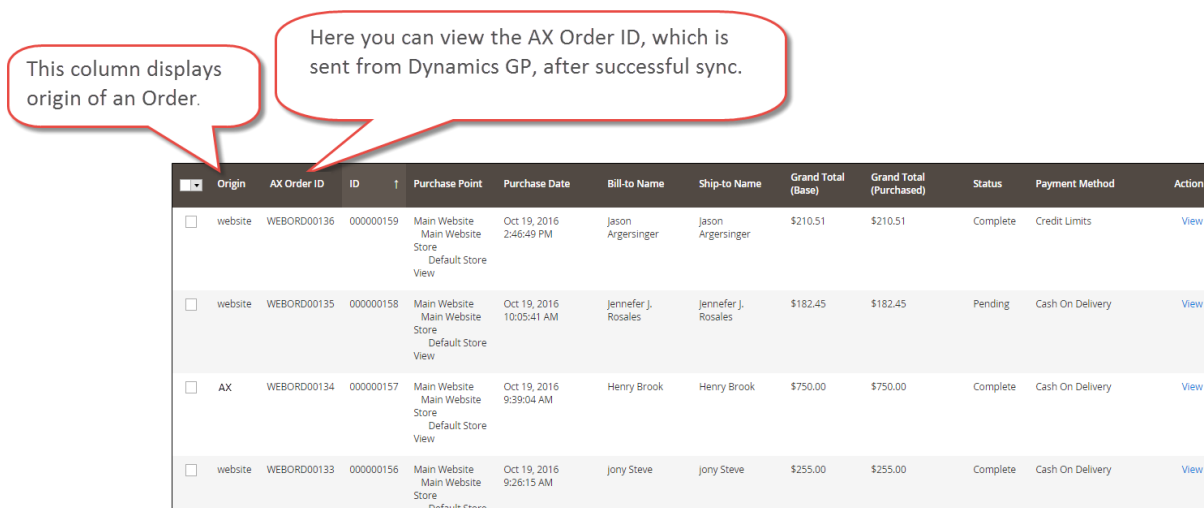
## 4.2. Order

### 4.2.1. Order workflow

In Dynamics AX, there is a default work flow for Order fulfillment which has 4 steps – Open Order → Picking list → packing slip → Invoice.

### 4.2.2. Order grid and information screen

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



This column displays origin of an Order.

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

Origin	AX Order ID	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Payment Method	Action
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	<a href="#">View</a>
website	WEBORD00135	000000158	Main Website Main Website Store Default Store View	Oct 19, 2016 10:05:41 AM	Jennefer J. Rosales	Jennefer J. Rosales	\$182.45	\$182.45	Pending	Cash On Delivery	<a href="#">View</a>
AX	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	<a href="#">View</a>
website	WEBORD00133	000000156	Main Website Main Website Store Default Store View	Oct 19, 2016 9:28:15 AM	jony Steve	jony Steve	\$255.00	\$255.00	Complete	Cash On Delivery	<a href="#">View</a>

Figure 8: Order grid in Magento admin

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

The Connector adds an additional AX Information section in the account Information tab. This section displays customer's AX 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 AX Information section to view Order's **AX Order ID**, **AX Order Status** and **AX Invoice ID**.

AX Information	
AX Order ID	NVS-000566
AX Order Status	Complete
AX Invoice ID	NVS-000119
AX Shipment ID	NVS-000061

Figure 9: AX 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 AX system as the master. Hence, both the inventory and tier pricing information is synchronized only from Dynamics AX 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 – AX Product Status. Products successfully synced between Magento and Dynamics AX have status as “Synced”.

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

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	AX Product Status	Action
3		Watch	Simple Product	Default	WATCH55	\$22.00	219.0000	Catalog, Search	Enabled	Main Website	Synced	Edit
14		Sony headphones	Simple Product	Default	HEADPHONES	\$150.00	111.0000	Catalog, Search	Enabled	Main Website	Synced	Edit
2		Markers	Simple Product	Default	PENS666	\$30.00	143.0000	Catalog, Search	Enabled	Main Website	Synced	Edit
4		Samsung Galaxy	Simple Product	Default	GALAXYON7	\$2,500.00	-2.0000	Catalog, Search	Enabled	Main Website	Synced	Edit

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

## 5. Message Queue Report in Magento

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

Customer	Product	Order
Address	Tier Price	Invoice
Customer Group	Price Level	Shipment

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

<b>Pending</b>	Status used for incoming data – once the Connector starts receiving a message (data of an entity) from Dynamics AX. At this stage, the data is received by Magento but yet to be synced.
<b>Success</b>	Status used for records which have successfully synced to Magento.
<b>Error</b>	Status used when the Connector encounters an error during the sync process.
<b>Complete</b>	Status used when a record is successfully synced to Magento and the success notification is sent back to the Dynamics AX 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 for a pre-configured number of 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 the failed data 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 overwhelmed (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.
2. Click **Reports** in the **Admin sidebar** → click **Message Queue Report** in i95Dev Message Queue group. The system displays the Message Queue Report screen.

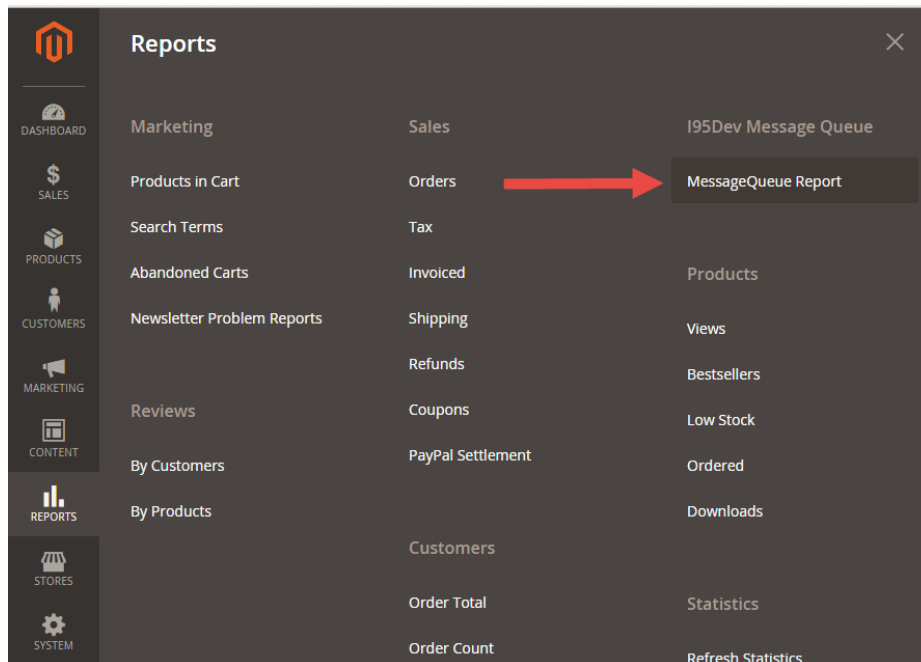


Figure 11: AXigation to Message Queue Report

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

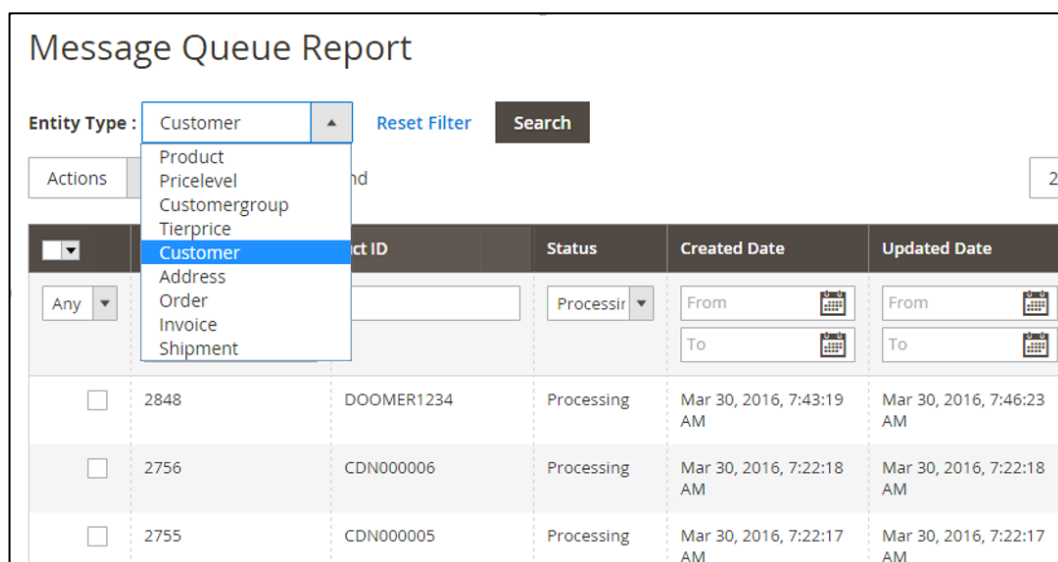


Figure 12: Entity Types in Message Queue Report

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

	Message ID	AX Customer ID	Email ID	Status	Created Date	Updated Date	Count	Response
	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Pending <input type="checkbox"/> Processing <input type="checkbox"/> Error <input type="checkbox"/> Success <input type="checkbox"/> Complete	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	
<input type="checkbox"/>	35	CUST9087	ConstanceRArnold@example.com		Nov 9, 2016, 9:55:02 AM	Nov 9, 2016, 9:57:18 AM	1	33
<input type="checkbox"/>	34	CUST9086	CallieMMedina@example.com	Complete	Nov 8, 2016, 1:54:07 PM	Nov 8, 2016, 1:54:33 PM	1	32
<input type="checkbox"/>	33	C00550	BATNK@test.com	Complete	Nov 8, 2016, 10:09:06 AM	Nov 8, 2016, 10:09:19 AM	1	30

Figure 13: Entity Status in Message Queue Report

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