



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

## i95Dev NAV Connect User Manual

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## 1. Introduction

**i95Dev NAV Connect** is a secure, scalable and an efficient way of integrating your Magento e-commerce and Microsoft Dynamics NAV system without impacting the client's existing workflows. i95Dev NAV 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 NAV Connect features and its functionality. The document works on the premise that the reader is familiar with Magento and Dynamics NAV 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 NAV Connect
3	Information exchanged between Magento and Dynamics NAV	List of data synchronized between Magento and Dynamics NAV.
4	Magento admin dashboard	Changes made in Magento admin screens to view Dynamics NAV information (like NAV 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 NAV Connect
- **Magento admin** - Magento's admin panel or web store's backend

## 2. Configuration and Setup

Once i95Dev NAV 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 NAV Connect and Message Queue report.

**Note** - This document is only for your reference. When NAV 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

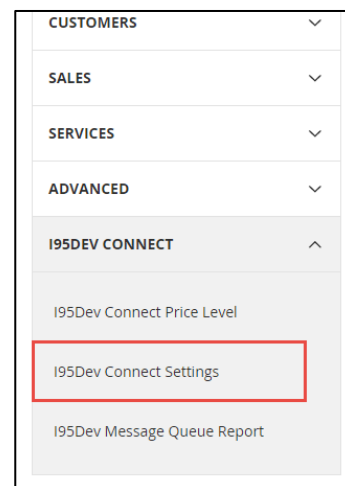
i95Dev Message Queue Report tab is where you can manage all the settings related to the reporting functionality made available by NAV Connect. The Message Queue report allows you to view the status of data syncing from Dynamics NAV to Magento, manually sync the data which did not sync automatically,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

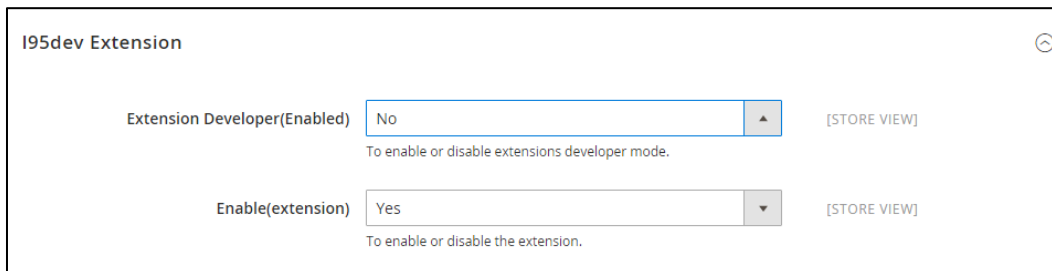


Figure 2: i95Dev Extension tab

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

## 2.2. Setting up the Connector

1. Select **NAV** 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 NAV 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 NAV to Magento.
6. In the **Default UoM** drop-down list, select the default UoM that will be assigned to the Products synced from Dynamics NAV 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 NAV.
  - b. **Shipment** When selected, a confirmation email is sent to the customer after a shipment is created in Dynamics NAV.
2. Order Total Mismatch Notification

## 2.4. General Contact Info

## 2.5. Enabling Message Queue Report

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

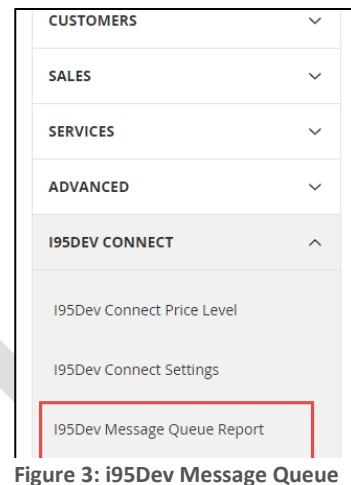


Figure 3: i95Dev Message Queue Report Configuration

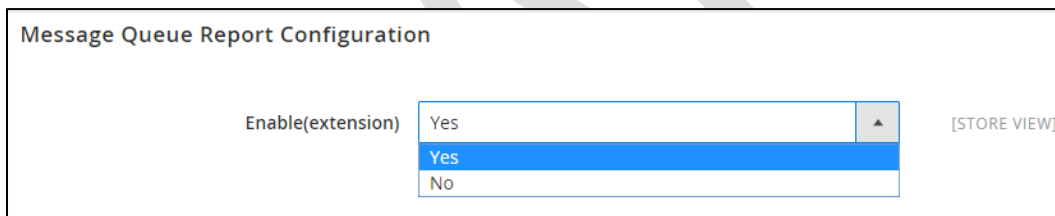


Figure 4: Message Queue Report Configurations

## 2.6. Implementing Locale

i95Dev NAV 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.

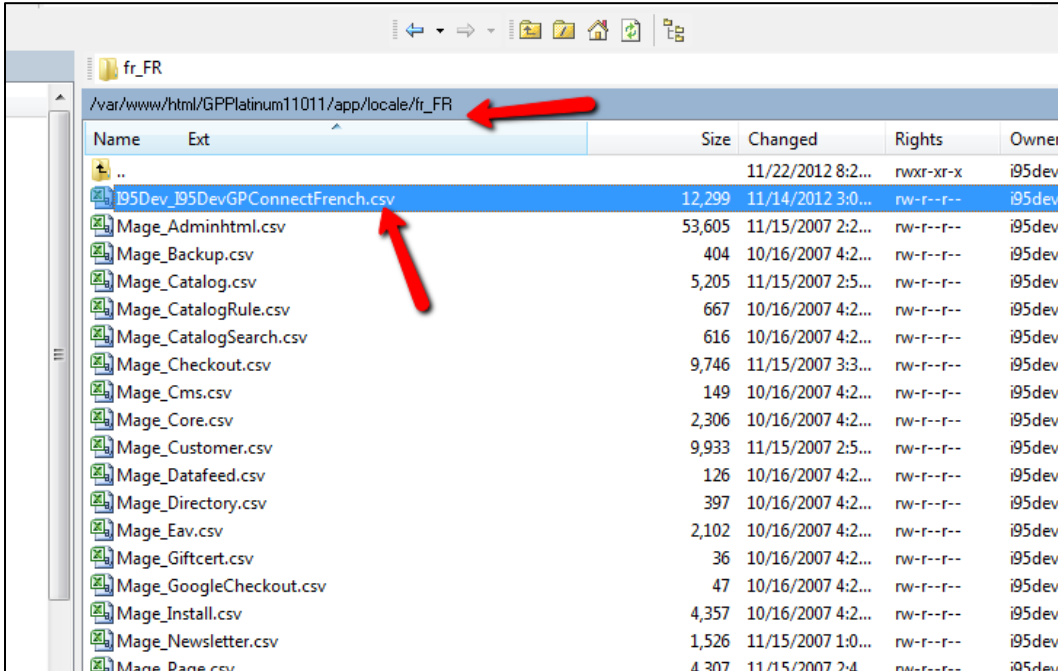


Figure 5: Locale implementation

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

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

Element	Magento to NAV	NAV 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 NAV information like NAV record ID, order status, etc. for records synced between Magento and Dynamics NAV.

## 4.1. Customer

### 4.1.1. Email Address

Customer email address is mandatory field in Magento, hence customer records created in Dynamics NAV 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:

**NAVcustomerid@companyname.com**

In the above email address the **NAVcustomerid** is the Customer ID given at the time of Customer creation in Dynamics NAV and **companyname** is the name of the NAV 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 NAV 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 NAV, you can view the NAV 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 NAV Customer ID – to display the primary identifier of the record in Dynamics NAV to help correlate the records in Magento and NAV.

This column displays origin of a Customer.

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

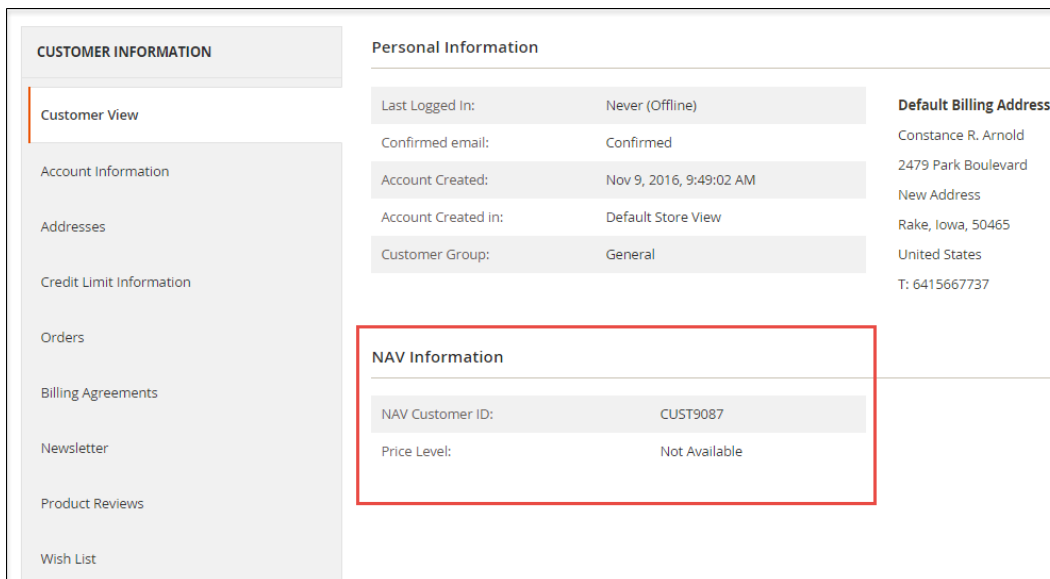
<input type="checkbox"/>	Origin	NAV Customer ID	ID ↑	Name	Email	Group	Phone	ZIP	State/Province	Web Site	Confirmed email	Account Created in	Date of Birth	Action
<input type="checkbox"/>	ERP	CUST9088	34	Elizabeth M. Velez	ElizabethMvelez@example.com	General	7412589630	46310	Indiana	Main Website		Default Store View		Edit
<input type="checkbox"/>	website	CUST9087	33	Constance R. Arnold	ConstanceRArnold@example.com	General	6415667737	50465	Iowa	Main Website		Default Store View		Edit
<input type="checkbox"/>	website	CUST9086	32	Callie M. Medina	CallieMMedina@example.com	General	7412589630	63146	Missouri	Main Website		Default Store View		Edit
<input type="checkbox"/>	website	CUST9085	31	Louise D. Uttell	LouiseDUttell@example.com	General	3157372199	123456	California	Main Website		Default Store View		Edit
<input type="checkbox"/>	NAV	C00550	30	Nikitha34 Kocharla	BATNK@test.com	General	1234567890	11010	New York	Main Website		Default Store View		Edit
<input type="checkbox"/>	website	CUST9084	29	ba test	batest@test.com	General	1234567890	08033	Washington	Main Website		Default Store View		Edit

Figure 6: Customer grid in Magento admin



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



CUSTOMER INFORMATION	
Customer View	Personal Information
Account Information	Last Logged In: Never (Offline)
Addresses	Confirmed email: Confirmed
Credit Limit Information	Account Created: Nov 9, 2016, 9:49:02 AM
Orders	Account Created in: Default Store View
Billing Agreements	Customer Group: General
Newsletter	Default Billing Address
Product Reviews	Constance R. Arnold
Wish List	2479 Park Boulevard
	New Address
	Rake, Iowa, 50465
	United States
	T: 6415667737
	NAV Information
	NAV Customer ID: CUST9087
	Price Level: Not Available

Figure 7: Customer’s NAV Information in Magento admin

## 4.2. Order

### 4.2.1. Custom order workflow

In Dynamics NAV, 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 NAV, which is an additional cost for the client. The 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 NAV’s default Order fulfillment workflow mentioned above.

### 4.2.2. Pre requisite for invoice sync

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

- The Order must be shipped.

- The Order status in Dynamics NAV 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 NAV Order ID.

This column displays Origin of an Order

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

Origin	NAV Order ID	D	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
NAV	1425	00000067	Main Website Main Website Store Default Store View	Nov 11, 2016 6:24:24 AM	CB BABU123	CB BABU123	\$9.00	\$9.00	Processing	<input type="checkbox"/> View
NAV	1424	00000066	Main Website Main Website Store Default Store View	Nov 9, 2016 2:47:20 PM	Andrew Ronny	Kevin Andrew	\$8.00	\$8.00	Complete	<input type="checkbox"/> View
website		00000065	Main Website Main Website Store Default Store View	Nov 9, 2016 10:53:18 AM	Elizabeth M. Velez	Elizabeth M. Velez	\$10.00	\$10.00	Pending	<input type="checkbox"/> View
NAV	1418	00000064	Main Website Main Website Store Default Store View	Nov 9, 2016 9:38:17 AM	Andrew Ronny	Kevin Andrew	\$8.00	\$8.00	Pending	<input type="checkbox"/> View
NAV	1416	00000063	Main Website Main Website Store Default Store View	Nov 9, 2016 9:23:20 AM	Andrew Ronny	Kevin Andrew	\$8.00	\$8.00	Pending	<input type="checkbox"/> View

Figure 8: Order grid in Magento admin

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

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

**Order & Account Information**

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**Order # 00000066 (The order confirmation email is not sent)**

Order Date	Nov 9, 2016, 2:47:20 PM
Order Status	Complete
Purchased From	Main Website Main Website Store Default Store View

**Account Information**

Customer Name	Andrew Ronny
Email	jivainfotech888@gmail.com
Customer Group	TESTNAV16

**NAV Information**

NAV Order ID	1424
NAV Order Status	Completed
NAV Invoice ID	103119
NAV Shipment ID	102182

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

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

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Target Product Status	Action
<input type="checkbox"/> 3		Watch	Simple Product	Default	WATCH55	\$22.00	219.0000	Catalog_Search	Enabled	Main Website	Synced	<a href="#">Edit</a>
<input type="checkbox"/> 14		Sony headphones	Simple Product	Default	HEADPHONES	\$150.00	111.0000	Catalog_Search	Enabled	Main Website	Synced	<a href="#">Edit</a>
<input type="checkbox"/> 2		Markers	Simple Product	Default	PENS666	\$30.00	143.0000	Catalog_Search	Enabled	Main Website	Synced	<a href="#">Edit</a>
<input type="checkbox"/> 4		Samsung Galaxy	Simple Product	Default	GALAXYON7	\$2,500.00	-2.0000	Catalog_Search	Enabled	Main Website	Synced	<a href="#">Edit</a>

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

## 5. Message Queue Report in Magento

The Message Queue Report gives an overview of the status of data sync transactions happening from Dynamics NAV 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 NAV. 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 NAV 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 couple of times which is pre-configured. 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.

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

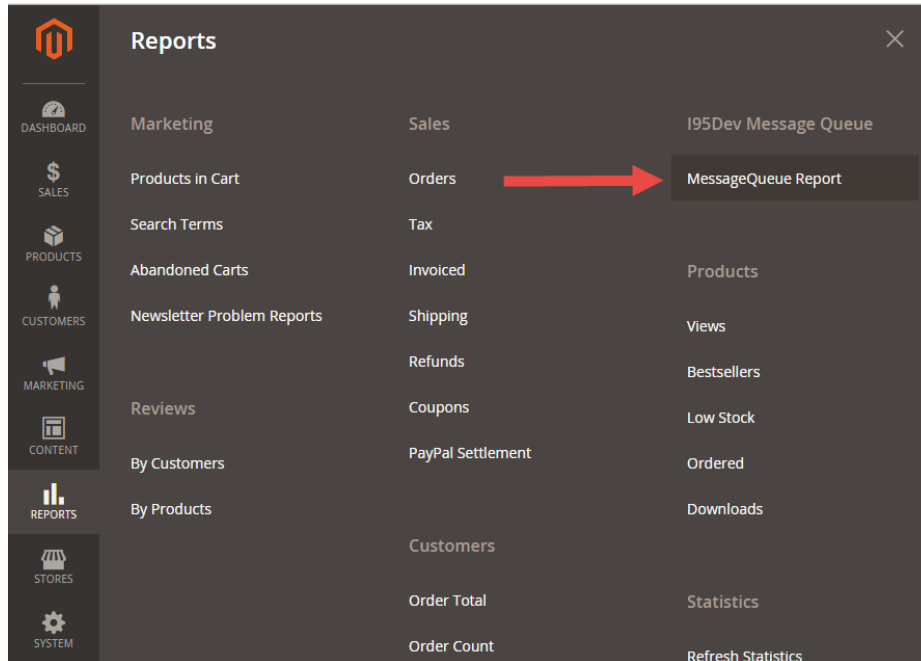


Figure 11: Navigation to Message Queue Report

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

### Message Queue Report

Entity Type: Customer

Actions

Entity Type	Product ID	Status	Created Date	Updated Date	
Any		Processing	From	From	
			To	To	
<input type="checkbox"/>	2848	DOOMER1234	Processing	Mar 30, 2016, 7:43:19 AM	Mar 30, 2016, 7:46:23 AM
<input type="checkbox"/>	2756	CDN000006	Processing	Mar 30, 2016, 7:22:18 AM	Mar 30, 2016, 7:22:18 AM
<input type="checkbox"/>	2755	CDN000005	Processing	Mar 30, 2016, 7:22:17 AM	Mar 30, 2016, 7:22:17 AM

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	NAV Customer ID	Email ID	Status	Created Date	Updated Date	Count	Response	
Any	From		Pending	From	From	From		
	To		Processing	To	To	To		
<input type="checkbox"/>	35	CUST9087	ConstanceARNold@example.com	Error	Nov 9, 2016, 9:55:02 AM	Nov 9, 2016, 9:57:18 AM	1	33
<input type="checkbox"/>	34	CUST9086	CallieMMedina@example.com	Success	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

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