

Connect Infoplus to your Magento 2 Site

If you have a **Magento** eCommerce site, you can integrate the site with Infoplus. Infoplus provides connections for Magento 2, described here, and for [Magento 1](#). When an order is placed on your Magento site containing Infoplus SKUs, use Infoplus to fulfill the order. Your Inventory levels from Infoplus are automatically pushed to Magento. Everything happens in real time.

NOTE: We recommend that you first set up the Magento 2 integration on a test Magento site (if you have one). Then, after testing, do the same thing on your production Magento site.

Here's what happens after connecting Infoplus to your Magento 2 Site:

- When a Magento order is placed, Infoplus will be notified of the new order.
- Infoplus will evaluate each of the products on that order. If any products are flagged for being fulfilled by Infoplus in Magento, the order and the Line Items will be pulled into Infoplus where the order can be fulfilled. Line items that are not flagged to be fulfilled will be ignored. If no items on the order are set to be fulfilled by Infoplus, the order will not be pulled into Infoplus.
- When the order is shipped in Infoplus, Infoplus notifies Magento of the order's shipped status, and tracking numbers are added to the Magento order. Infoplus will also create invoices and capture payments if configured to do so in Infoplus.
- Inventory levels for Magento products flagged for being fulfilled by Infoplus will be pushed from Infoplus to Magento in real time. You may configure your products in Magento to be removed from your site when they are out of stock, to help prevent taking Backorders.

Connecting Infoplus to your Magento 2 Site is a 6-step process:

(Detailed instructions for each step are listed below.)

1. In your Magento site, [install the Infoplus Connect extension](#) from the Magento Marketplace.

2. In your Magento site, [create a new Role & User](#). This information will be used to connect your Magento site to Infoplus during creation of your Shopping Cart Connection.
3. In Infoplus, [create your Shopping Cart Connection](#).
4. In your Magento site, [finalize the connection between Infoplus and Magento](#) by providing the URL of your Infoplus instance.
5. In your Magento store, [flag any products that you want to be considered for fulfillment by Infoplus](#).
6. [Place test orders in your Magento store](#) and review Infoplus results.

Once connected, you may want to [turn on Shopping Cart Alerts](#) in Infoplus. This lets you see messages that Infoplus receives from Magento (i.e., if an error occurred).

Step 1: Install the Infoplus Connect Extension into your Magento 2 Site

This step gives Infoplus access to your Magento site.

1. Click on the [Infoplus Connect](#) extension in the Magento Marketplace.
2. Add the Extension to your cart and complete your purchase.
NOTE: You may need to log into the Magento Connect Marketplace to continue.
3. After completing the installation, return to the Admin Panel and logout and back in to ensure you are using a new session to continue with the next set of steps.

Step 2: Create a User Role & User in Magento 2

This information will be used to connect your Magento site to Infoplus in a later step.

Create a New Role

1. Open Magento and access the **Admin Panel**.
2. Click on the **System** icon in the left sidebar. Then click on **User Roles**.

3. Click the **Add New Role** button. The **New Role** screen appears.

System Messages: 1

New Role

← Back Reset Save Role

ROLE INFORMATION

Role Information

Role Info

Role Name * Infoplus Connect Role

Role Resources

Current User Identity Verification

Your Password *

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[Account Activity](#) | [Report Bugs](#)

4. Type in the **Role Name**. We recommend naming the role "**Infoplus Connect Role.**"
5. Provide **Your Password** for identity verification.
6. Click on **Role Resources** on the left. The resource list appears.

System Messages: 1

New Role

← Back Reset Save Role

ROLE INFORMATION

Role Info

Role Resources

Roles Resources

Resource Access

Resources

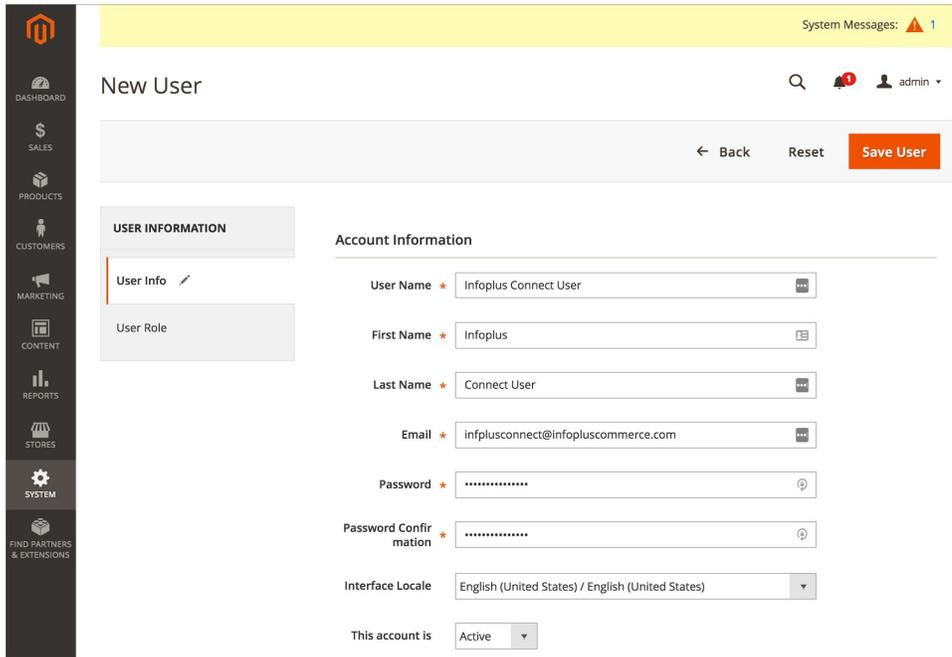
- Dashboard
- Sales
- Operations
 - Orders
 - Actions
 - Create
 - View
 - Send Order Email
 - Reorder
 - Edit
 - Cancel
 - Accept or Deny Payment
 - Capture
 - Invoice
 - Credit Memos
 - Hold
 - Unhold
 - Ship
 - Comment

✓ Custom
All

7. Select "All" from the **Resource Access** dropdown.
8. Click **Save Role**.

Create a New User

1. From the Magento **Admin Panel**, click on the **System** icon in the left sidebar. Then click on **All Users**.
2. Click the **Add New User** button. The **New User** screen appears.



The screenshot shows the 'New User' form in the Magento Admin Panel. The form is divided into two main sections: 'USER INFORMATION' and 'Account Information'. The 'USER INFORMATION' section includes 'User Info' (with an edit icon) and 'User Role'. The 'Account Information' section includes the following fields:

- User Name: Infoplus Connect User
- First Name: Infoplus
- Last Name: Connect User
- Email: infoplusconnect@infopluscommerce.com
- Password: [Redacted]
- Password Confirmation: [Redacted]
- Interface Locale: English (United States) / English (United States)
- This account is: Active

At the top right of the form, there are buttons for 'Back', 'Reset', and 'Save User'. A search bar and a user profile icon labeled 'admin' are also visible at the top.

3. Fill in the **Account Information** for the user. We recommend the following:
 - **User Name:** Infoplus Connect User
 - **First Name:** Infoplus
 - **Last Name:** Connect User
 - **Email:** infoplusconnect@infopluscommerce.com
 - **Password:** Use a randomly generated and secure value. Be sure to keep track of this password for later use.

NOTE: Consider using an online service for generating this random password. Here is [a search](#) to identify a service.
4. Provide **Your Password** for identity verification. You may need to scroll down to view this field.
5. Click on the **User Role** section on the left, and select the **Role** you created earlier.
6. Click **Save User**.

Step 3: Create an Infoplus Shopping Cart Connection for Magento 2

1. In Infoplus, go to the **Shopping Cart Connection** table. Two ways:
 - *From the **Dashboard**:* Click the “**Account Management**” tab, click the “**Shopping Cart**” App, then click the “**Shopping Cart Connection**” Table.
 - *From the **Quick Actions shortcut**:* Press a dot (period) on your keyboard, then select “**Shopping Cart Connection**” from the list of Quick Actions.
2. Click the **Create New** button. The **Creating New Shopping Cart Connection** window appears.

Creating New Shopping Cart Connection

Name •

LOB •

Order Source •

Integration Partner •

Connection Type •

Username •

Password •

Shopping Cart Store URL •

Item Filter •

Infoplus SKU Field To Map •

Shopping Cart SKU Field To Map •

Sync Orders •

Sync Inventory •

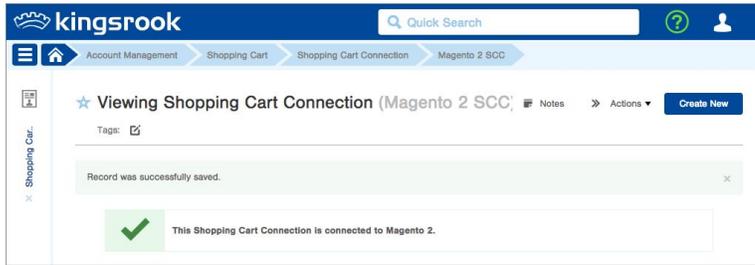
Sync Tracking Data •

3. Type a **Name** for the Shopping Cart connection (e.g. Magento 2 SCC).
4. In the **LOB** field, select the Line of Business associated with the shopping cart.
5. Select the **Order Source** associated with the shopping cart (e.g. Walmart, Amazon). If an Order Source is not applicable, select "Not Specified." Selecting an Order Source for Magento orders lets you locate records and perform other actions in Infoplus (e.g., create metrics associated with the Order Source).

NOTE: Selecting an Order Source does not communicate which Magento orders are to be fulfilled by Infoplus. It provides information only.
6. Select the **Integration Partner** for this shopping cart connection (e.g. SPS Commerce). If there is no Integration Partner, select "Not Specified."
7. In the **Connection Type** field, select "Magento 2." New fields for **Username** and **Password** will appear.

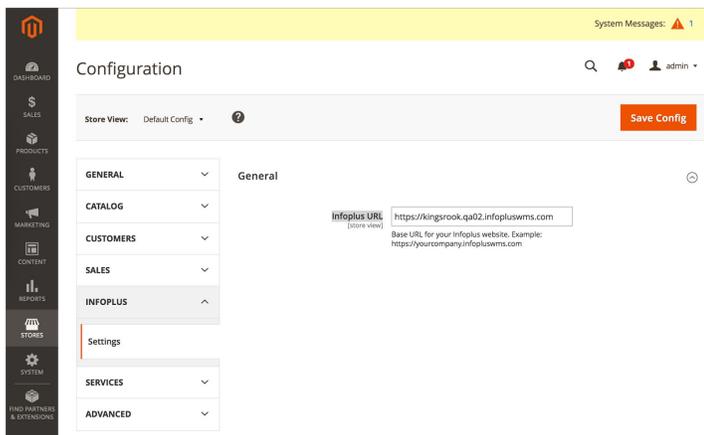
8. Enter the **Username** from the Magento 2 user account that you created previously, e.g. "Infoplus Connect User".
9. Enter the **Password** from the Magento 2 user account that you created previously.
10. In the **Sync Orders** field, select whether you want Orders that are placed in Magento to be synchronized with Infoplus. By selecting "True", when orders are created in Magento containing items to be fulfilled by Infoplus, an order will automatically be created in Infoplus.
11. In the **Sync Inventory** field, select whether you want the Inventory levels to be pushed from Infoplus to Magento. Selecting "True" tells Infoplus to communicate inventory levels to Magento. Once synchronized, quantities of selected items will match.
12. In the **Sync Tracking Data** field, select whether you want shipment Tracking Data to be pushed from Infoplus to Magento. Selecting "True" turns synchronization on. For example, you may want to send tracking data if you use Magento to email shipment confirmations.
13. In the **Shopping Cart Store URL field**, enter your Magento store URL, e.g., ["https://mystore.com/magento2"](https://mystore.com/magento2).
14. The **Item Filter** field is optional. If you have a specific set of items that Infoplus should consider when pushing inventory levels to Magento, create a filter in the Item table, and then select the Filter here. If all items are to be considered, leave the field blank.
NOTE: Later in this process of connecting Infoplus to your Magento site, you will need to specify within each Product record in Magento if inventory levels should be pulled from Infoplus. An Item Filter simply allows you to narrow the list of items down further as opposed to updating each item in Magento.
15. In the **Infoplus SKU Field to MAP** and **Shopping Cart SKU Field to Map** fields, select the product identifiers that should be used to match products between Infoplus and Magento. For example, if both Infoplus and Magento use a field called "SKU" to identify the product, set both fields to SKU. If different product identifiers are used, such as Vendor SKU or UPC, select that as the SKU field.

16. Click **Save**. The record will be saved and a message will appear at the top of the screen indicating the connection was made successfully.



Step 4: Provide Your Infoplus Instance URL to Magento 2

1. From the Magento **Admin Panel**, click on the **Stores** icon in the left sidebar. Then click on **Configuration**.
2. Click the **Infoplus** tab on the left side of the **Configuration** window, revealing the Infoplus **Settings** sub-tab.
3. Click on the Infoplus **Settings** sub-tab. The **Infoplus URL** field appears on the screen.



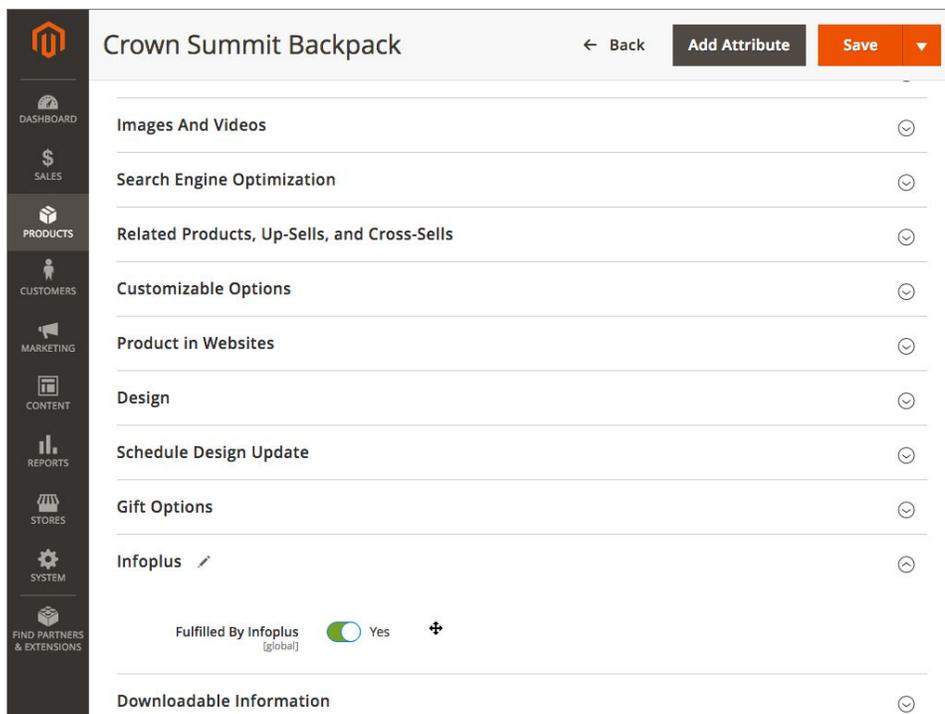
4. Enter your **Infoplus URL**, which is the URL for your Infoplus instance. The URL must appear in this format: <https://yourcompany.infopluswms.com> . Notice that the URL starts with "https://" and has no slash (/) at the end.
5. Click **Save Config** to finalize the connection between Infoplus and Magento.

Step 5: In Magento 2, Choose Products To Be Fulfilled by Infoplus

For each product you want Infoplus to fulfill, complete these steps in Magento.

NOTE: Infoplus inventory levels for these products will also be available to Magento.

1. In Magento, edit the page for the product that should be fulfilled by Infoplus.
2. Click on the **Infoplus** section of the page to view the fulfillment setting for the product.
3. Move the **Fulfilled By Infoplus** slider to the "Yes" position.
4. Click the **Save** button.



The screenshot displays the Magento 2 admin interface for the product 'Crown Summit Backpack'. The left sidebar contains navigation menus for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area shows the product configuration page with a top navigation bar including 'Back', 'Add Attribute', and 'Save' buttons. The configuration is organized into sections: Images And Videos, Search Engine Optimization, Related Products, Up-Sells, and Cross-Sells, Customizable Options, Product in Websites, Design, Schedule Design Update, Gift Options, Infoplus, and Downloadable Information. The 'Infoplus' section is expanded, showing a toggle switch for 'Fulfilled By Infoplus' set to 'Yes'.

Section	Setting
Images And Videos	☺
Search Engine Optimization	☺
Related Products, Up-Sells, and Cross-Sells	☺
Customizable Options	☺
Product in Websites	☺
Design	☺
Schedule Design Update	☺
Gift Options	☺
Infoplus	Fulfilled By Infoplus [global] <input checked="" type="checkbox"/> Yes
Downloadable Information	☺

Step 6: Test the Integration

This step confirms the integration.

1. Place test orders in your Magento store containing one or more of the Products for which you specified fulfillment by Infoplus.
2. Evaluate the orders to confirm that ones that should have been pulled into Infoplus succeeded.
NOTE: If testing on your Live site, you may want to delete the test orders in Infoplus and Magento.

The Infoplus-Magento 2 Integration is complete.

Related information:

- [Overview of External Shopping Cart Connections](#)
- [Connect Infoplus to your Magento 1 Site](#)
- [Turn On and View Shopping Cart Alerts](#)
- [Rerun Shopping Cart Business Transactions](#)
- [View Shopping Cart Connection Log](#)