

Erply extension

User Manual for Magento 2

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1. Introduction

The Erply extension is the interface between Erply Accounting software and Magento and it is used to perform export and import operations between them (import/export products, customers etc).

Erply extension main functionalities:

- Imports and exports products with their prices, pictures and other attributes between Erply and Magento (also archived products).
- Imports Erply product groups from Erply and converts them into Magento categories.
- Imports stock information from Erply to Magento.
- Imports and exports customer information between Erply and Magento.
- Exports sales information from Magento to Erply

2. Installation

- Create directory `/app/code/Aedes/Erply/` and copy all files from ZIP there
- enable module: `php bin/magento --clear-static-content module:enable Aedes_Erply`
- Upgrade database: `php bin/magento setup:upgrade`
- Compile the module: `php bin/magento setup:di:compile`
- If in production mode run: `php bin/magento setup:static-content:deploy`
- Clear the cache: `php bin/magento cache:flush`
- Please follow configuration setup steps clarified [here](#)

3. Configuration and Setup

Once the Erply extension is installed in your Magento system Erply tab is added to the store's configurations screen. Here are instructions on how to set up the extension first time and how to configure it for everyday usage.

3.1 First-time Usage

This section will show you how to set up the Erply extension via Magento admin. For first-time use, admin session lifetime needs to be changed.

To change **Admin Session Lifetime**:

1. navigate to **Stores > Configuration > Advanced > Admin > Security**
2. find the option **Admin Session Lifetime (seconds)**
3. set value **86400** or higher to this field
4. press the button **Save config**

Add Secret Key to URLs [global] Yes Use system

Login is Case Sensitive [global] No Use system

Admin Session Lifetime (seconds) [global] 86400 Use system
Please enter at least 60 and at most 31536000 (one year).

Maximum Login Failures to Lockout Account [global] 6 Use system
We will disable this feature if the value is empty.

Lockout Time (minutes) [global] 30 Use system

If **Admin Session Lifetime** is changed, then you can enable Erply extension from Magento **Admin** panel.

To enable Erply extension :

1. navigate to **Stores > Configuration > M2S > Erply**
2. in **General** section set **Enabled** option to 'Yes'.
3. in **General** section setting parameter '**Erply account languages**' drop down appears after you have entered Account details. Map Erply translations with your store view to enable importing products and their translations to correct store view
4. in **Account** section enter your account info (**Client Code, Username and Password**)

5. press the button **Save Config**

General

Enabled [global] Yes

Languages [global]

Erply account languages	Magento stores	Action
<input type="button" value="Add"/>		

Account

Client Code [global]

Username [global]

Password [global]

Important! After every change or multiple changes in settings, you must click **Save Config** in order for these changes to take effect.

3.2 Configuration

After enabling the Erply extension it needs to be configured for everyday usage. This section will show you how to configure the extension via Magento **Admin**. The extension configuration panel is organized by type where each section serves a specific Magento related entity.

Products

Archived Products

Categories

Stocks

Customers

Sales

3.2.1 Products

Products section holds primary settings for the integration of the products between Erply and Magento.

New Product Status - Choose the status that will be automatically assigned to new products.

Synchronize Images - Set the option to 'Yes' and product images will be synchronized when importing products from Erply to Magento or exporting products from Magento to Erply.

CRON Import Schedule - Activate desired date and time when bulk data is imported. To learn more about Cron expressions, go to <https://crontab.guru/>.

Allow Import Matrix Product - Set this option to 'Yes', if you want to enable importing of matrix (configurable) products to Magento.

Import All Products - Set the option to 'Yes' to enable import of products. After that, the **Import** button appears and when pressing it then one shot import of all products data is performed.

What happens when the **Import** button is pressed?

- This initiates the collection of all products available in Erply and saves them in Magento.
- At the first usage, it imports all existing products.
- After that, it imports only these products that were changed in Erply after the last import.

Export All Products - Set the option to 'Yes' to enable export of products. After that, the **Export** button appears and when pressing it then one shot export of all products data is performed.

What happens when the **Export** button is pressed?

- This initiates the transfer of all products available in Magento to Erply. **NB!** Only simple products are exported to Erply.
- At the first usage, it exports all existing products.
- After that, it exports only these products that were added to Magento after the last export.
- If **Synchronize Images** is enabled, old products are skipped but their images are checked to see if new images added after the last export.

Mapping attributes - Add attributes' configurations to map information about products correctly. **NB! Mapping attributes** has to be done before importing matrix (configurable) products.

- After pressing the **Add** button, specify the settings:
- **Erply Attribute Code** - Enter the attribute's unique identifier used in Erply.
- **Magento Attribute Code** - Enter the attribute's unique identifier used in Magento.
- **Attribute Label** - Specify a name for the attribute.
- **Attribute Type** - Assign type to the attribute.
- **Is Matrix Dimension** - Set the option to 'Yes' if the attribute is a matrix (configurable) dimension that belongs to a matrix (configurable) product.

Mapping attribute sets - To import Erply parameters groups mapping has to be done

- After pressing the **Add** button, specify the settings:
- **Erply parameters groups** - Enter the parameters group unique identifier used in Erply.
- **Magento Attribute Sets** - Enter the attribute sets unique identifier used in Magento.

Products

New Product Status [global]

Synchronize Images [global]

CRON Import Schedule [global]
Cron expressions: see more @ crontab.guru

Allow Import Matrix Product [global]

Import All Products [global]
Disable/Enable Import Products Functionality.

Products

Export All Products [global]
Disable/Enable Export Products Functionality.

Products

Mapping attributes [global]

ERPLY Attribute Code	Magento Attribute Code	Attribute Label	Attribute Type	Is Matrix Dimension	Action
<input type="text" value="color"/>	<input type="text" value="color"/>	<input type="text" value="Color"/>	<input type="text" value="Text"/>	<input type="text" value="Yes"/>	<input type="button" value="🗑"/>
<input type="text" value="size"/>	<input type="text" value="size"/>	<input type="text" value="Size"/>	<input type="text" value="Text"/>	<input type="text" value="Yes"/>	<input type="button" value="🗑"/>
<input type="text" value="length"/>	<input type="text" value="length"/>	<input type="text" value="Length"/>	<input type="text" value="Decimal"/>	<input type="text" value="Yes"/>	<input type="button" value="🗑"/>

Mapping attribute sets [global]

Erply parameter groups	Magento attribute sets	Action
<input type="text"/>	<input type="text"/>	<input type="button" value="🗑"/>

Parameters

3.2.2 Archived Products

Archived Products section holds primary settings for the integration of the archived products between Erply and Magento.

Save Product Settings - Set the option to 'Yes' and product settings will be saved before archiving product

Set Product Status - Determine a status for archived products. You can choose between two options **Do Nothing** and **Disabled**. **Do Nothing** means that archived product status in Magento stays the same and if an archived product already exists in Magento then product status what is already assigned to the product does not change. **Disabled** means that the status '**Disabled**' will be assigned to archived products in Magento.

Set Stock Status - Determine the archived products stock status. You can choose between two options **Do Nothing** and **Disabled**. When **Do Nothing** is chosen, archived product stock status in Magento stays unchanged. **Disabled** - archived product stock status in Magento will be Disabled. **Disabled** means that the stock status '**Disabled**' will be assigned to archived products in Magento.

Set Visibility - Specify where archived products can be visible in your store.

Archived Products

Save Product Settings <small>[global]</small>	No	▼
	Setting determines whether product settings are saved or not before archiving product	
Set Product Status <small>[global]</small>	Disabled	▼
	Setting determines archived product status. Do nothing - archived product status in Magento stays the same and if archived product already exists in Magento then product status what is already assigned to product does not change. Disabled - archived product status in Magento = disabled	
Set Stock Status <small>[global]</small>	Disabled	▼
	Setting determines archived product stock status. Do nothing - archived product stock status in Magento stays unchanged. Disabled - archived product stock status in Magento = out of stock	
Set Visibility <small>[global]</small>	Not Visible Individually	▼
	Setting determines archived product visibility	

3.2.3 Categories

Categories section holds primary settings for the integration of the categories between Erply and Magento.

Synchronize Categories - Set the option to 'Yes' to synchronize categories of products between Erply and Magento.

Erply Categories Source - Choose the origin of categories in Erply. If you set the option to 'Product Groups', the **Import** button appears and when pressing it one shot import of categories data is performed. This imports Erply's **Product Groups** and converts them into Magento's **Categories**. Product Groups already imported earlier are skipped. If you set the option to 'Code 3 Field', the categories will be synchronized based on Code 3 field. In this case, categories will be associated with products according to their numerical ID-s. Note that Code 3 categories are imported with products and don't require manual importing. If you set the option to 'Both', both types of categories will be synchronized (don't forget to click the **Import** button for importing **Product Groups** categories).

Categories

Screenshot of the Erply Categories configuration interface. It shows two dropdown menus: 'Synchronize Categories [global]' set to 'Yes' and 'Erply Categories Source [global]' set to 'Product Groups'. Below these is an 'Import' button and a note: 'Please note that only product groups will be imported, code3 categories are imported with products'.

3.2.4 Stocks

Stocks section holds primary settings for the integration of the stocks between Erply and Magento.

Warehouses - Select a warehouse which is checked in Erply when importing **Stocks** of products. Changing the warehouse, you should click **Save Config** before clicking **Import** stocks, otherwise, it would break the synchronization. This action also affects the products' quantities during **Import All Products** functionality.

Primary Warehouse - Choose which warehouse will be used first for the accounting of stocks used in orders/invoices.

CRON Import Schedule - Activate desired date and time when bulk data is imported. To learn more about Cron expressions, go to <https://crontab.guru/>.

Import All Stocks - Set the option to 'Yes' to enable import of stocks. After that, **Import** button appears and if pressed then one shot import of all stocks data is performed. It imports only these products stocks that were changed in Erply after the last import.

Stocks

Warehouses [global] All Warehouses
Choose which warehouse to import stock from. when changing then warehouse, admin must click "Save Config" and then click import stocks. Otherwise it would break the sync

Primary Warehouse [global] Põhiladu
Choose which warehouse is to be used first to account for stocks used in orders/invoices

CRON Import Schedule [global]
Cron expressions: see more @ crontab.guru

Import All Stocks [global] Yes
Disable/Enable Import Stocks Functionality.

Stock

3.2.5 Customers

Customers section holds primary settings for the integration of the customers between Erply and Magento.

Handle Customer Ordering - Specify how the orders of **Logged In Users** will be handled. If you set the option to 'Use Magento Customers', normal Magento customer accounts will be used for orders then exporting. If you set the option to 'Use Default Erply Customer', one default Erply account will be used for all customer orders when exporting.

Erply Default Customer ID - This option is shown if the previous option is set to 'Use Default Erply Customer'. Enter **Erply Default Customer ID** if exists. Else, leave it empty and a random Erply account will be created when you click **Save Config**. The created account will be saved and used for later orders. If a new value is entered and saved, it will override the old ID.

Handle Customer Ordering - Specify how the orders of **Guest Users** will be handled. If you set the option to 'Check for Email First', the system will search in Erply for an email matching the guest user first, if the email is not found, a random customer will be created and used. If you set the option to 'Generate New For Each Order', a random Erply customer will be generated for every

order. If you set the option to '**Use Default Erply guest account**', one default Erply guest account will be used for all customer orders when exporting.

Erply Default Guest ID - This option is shown if the previous option is set to '**Use Default Erply guest account**'. Enter **Erply Default Guest ID** if exist. Else, leave it empty and a random Erply guest account will be created when you click **Save Config**. The created guest account will be saved and used for later orders. If a new value is entered and saved, it will override the old ID.

Billing Address Type ID - Select which Erply address type is a billing address. It will be exported to Erply along with customers and orders. The types are retrieved from Erply and presented in the drop-down list.

Shipping Address Type ID - Select which Erply address type is a shipping address. It will be exported to Erply along with customers and orders. The types are retrieved from Erply and presented in the drop-down list.

Welcome Email - Set the option to '**Yes**' if you want to send automatically welcoming emails to newly created customers when importing.

CRON Import Schedule - Activate desired date and time when bulk data is imported. To learn more about Cron expressions, go to <https://crontab.guru/>.

Import All Customers - Set the option to '**Yes**' to enable import of customers. After that, the **Import** button appears and when pressed then one shot import of all customer data is performed.

What happens when the **Import** button is pressed?

- This initiates the collection of all customers available in Erply and saves them in Magento.
- At the first-time usage, it imports all existing customers.
- After that, it imports only these customers that were changed in Erply after the last import (along with addresses).
- Customer is skipped if one of the following is missing:
 - Address: ['city', 'country_id', 'firstname', 'lastname', 'street', 'telephone'];
 - Main info: ['email', 'firstname', 'group_id', 'lastname', 'store_id', 'website_id'].

Export All Customers - Set the option to '**Yes**' to enable export of customers. After that, the **Export** button appears and when pressed then one shot export of all customer data is performed.

What happens when the **Export** button is pressed?

- This initiates the transfer of all customers available in Magento to Erply.
- At the first-time usage, it exports all existing customers.
- After that, it exports only these customers that were added to Magento after the last export.
 - Addresses are checked separately for older customers and new addresses are exported if exists.

Customers

Handle Customer Ordering <small>[global]</small>	Use Magento Customers	▼
	Use normal magento customer accounts for orders OR Use one default Erply account for all customer orders	
Handle Guest Ordering <small>[global]</small>	Check For Email First	▼
	Choose either to, check for existing Erply users by email first OR genrate random Erply customer for every order OR Use a default guest Erply account	
Billing Address Type ID <small>[global]</small>	Mailing Address	▼
	Select which ERPLY address type is billing address.	
Shipping Address Type ID <small>[global]</small>	Mailing Address	▼
	Select which ERPLY address type is shipping address.	
Welcome Email <small>[global]</small>	No	▼
	Send welcoming email to newly created customers.	
CRON Import Schedule <small>[global]</small>	<input type="text"/>	
	Cron expressions: see more @ crontab.guru	
Import All Customers <small>[global]</small>	No	▼
	Disable/Enable Import Customers Functionality.	
Export All Customers <small>[global]</small>	No	▼
	Disable/Enable Export Customers Functionality.	

Customers' integration settings

3.2.6 Sales

Sales section holds primary settings for the integration of the sales information between Erply and Magento.

CRON Import Schedule - Activate desired date and time when bulk data is imported. To learn more about Cron expressions, go to <https://crontab.guru/>.

Payment Specific Sales Document Type - Choose the type of the document to be exported for each payment type

- After pressing the **Add** button, specify the settings:
- Choose **Magento Payment type** - Choose the type of the order and invoice to be exported

Send Orders - Set the option to 'Yes' and sales documents will be automatically exported from Magento to Erply when the order is created.

- If the previous option is set to 'Yes', the following options will appear:
- **Choose Sales Document Type** - Choose the type of the document to be exported. You can find more information about each type here: <http://help.erply.com/the-back-office/sales-document-types>.
- **Use Magento Document Numbers** - Set the option to 'Yes', if you prefer using in Erply same Document Numbers that are used in Magento. If you set this option to 'No' then Erply will generate new Document Numbers.
- **Send Invoices** - Set the option to 'Yes' and sales documents will be automatically exported from Magento to Erply when the order is invoiced.
- If the previous option is set to 'Yes', the following options appear:
- **Choose Sales Document Type** - Choose the type of document to be exported. You can find more information about each type here: <http://help.erply.com/the-back-office/sales-document-types>.
- **Use Magento Document Numbers** - Set the option to 'Yes', if you prefer using in Erply same Document Numbers that are used in Magento. If you set this option to 'No' then Erply will generate new Document Numbers.
- **Save Payment** - Set the option to 'Yes' if you would like to save information about payments in Erply.
- **Payment Type** - This field is shown if the previous option is set to 'Yes'. Determine the **Payment Type** that will be set to payments in Erply when exporting Orders or Invoices.
- Explanation of Payment types:
 - CASH - in cash.
 - TRANSFER - by wire transfer.
 - CARD - by credit or debit card.
 - CHECK - by check.
 - CREDIT - via credit invoice. This type should be used when a due amount is cleared with a credit invoice, or in case of any other balancing transaction.
 - GIFTCARD - with a gift card.

Send Credit Memos - Set the option to 'Yes', if you would like to send Credit Memos to Erply. **Credit Memo** is a document issued by the seller to the buyer, reducing the amount that the buyer owes to the seller under the terms of an earlier invoice. Credit Memos are saved in Erply as CREDITINVOICE.

Use Magento Document Numbers - This field is shown if the previous option is set to 'Yes'. Set this option also to 'Yes', if you prefer using in Erply same Document Numbers that are used in Magento. If you set this option to 'No' then Erply will generate new Document Numbers.

Sales

Paid Orders CRON Import Schedule [global]

Cron expressions: see more @ crontab.guru

Payment Specific Sales Document Type [global]

Magento Payment Types	Export Orders as	Export Invoice as	Action
PayPal Express Checkou <input type="text"/>	No Action <input type="text"/>	No Action <input type="text"/>	
<input type="button" value="Add"/>			

Specify an Erply sales document type for orders/invoices based on payment type | No Action will apply the default type chosen below for each

Send Orders [global] Yes

Note: this will export sales documents to Erply when the order is created

Order Default Sales Document Type [global] ORDER

Sales Documents Types: @ help.erply.com this will determine the default document type when exporting orders

Use Magento Document Numbers [global] Yes

If set to 'No' then ERPLY generates new numbers.

Send Invoices [global] Yes

Note: this will export sales documents to Erply when the order is invoiced

Invoice Default Sales Document Type [global] ORDER

Sales Documents Types: @ help.erply.com this will determine the default document type when exporting orders

Use Magento Document Numbers [global] Yes

Sales' integration settings