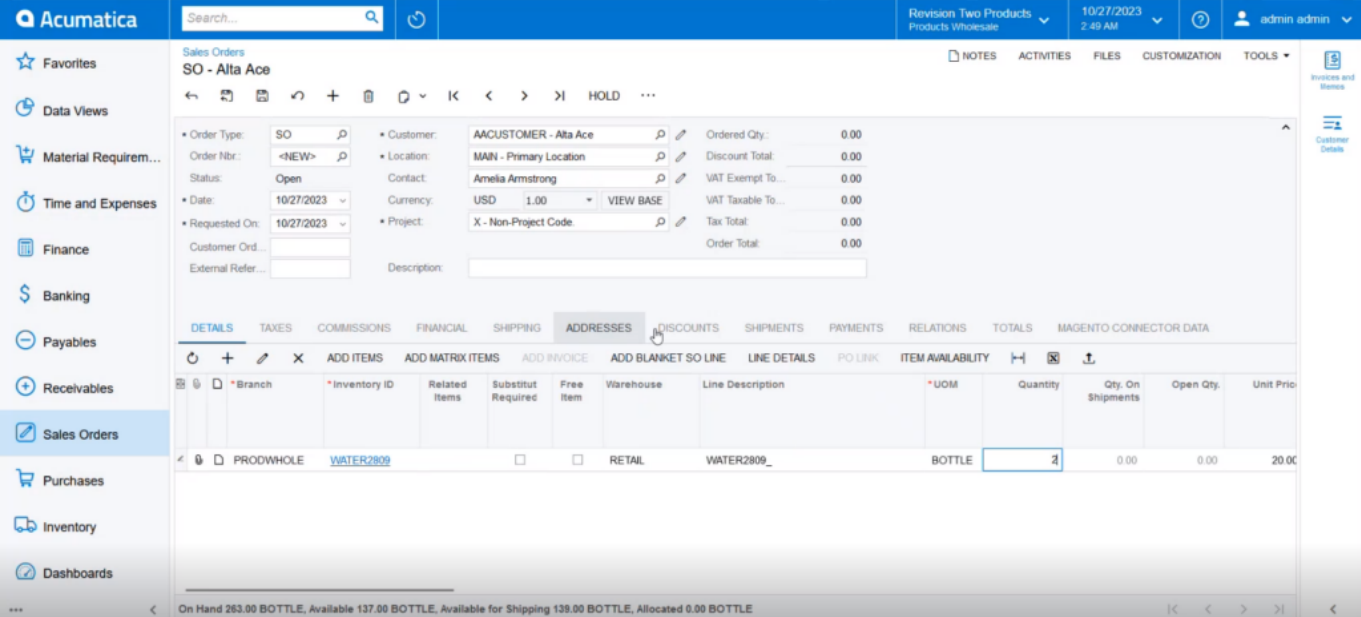


Orders in Acumatica and Sync with Magento



You can place an order within Acumatica and sync the same into Magento. You need to follow the steps as described below.

Step 1: Create the Order in Acumatica.



The screenshot shows the Acumatica Sales Orders interface. The top navigation bar includes the Acumatica logo, a search bar, and user information. The left sidebar lists various modules like Favorites, Data Views, Material Requirements, Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders (highlighted), Purchases, Inventory, and Dashboards. The main area displays the 'Sales Orders' form for 'SO - Alta Ace'. The 'ADD ITEMS' tab is active, showing a table with columns: Branch, Inventory ID, Related Items, Substituted Required, Free Item, Warehouse, Line Description, UOM, Quantity, Qty. On Shipments, Open Qty, and Unit Price. A single item is listed: 'PRODWHOLE WATER2809' with a quantity of 2. The bottom status bar shows inventory levels: 'On Hand 253.00 BOTTLE, Available 137.00 BOTTLE, Available for Shipping 139.00 BOTTLE, Allocated 0.00 BOTTLE'.

Order Creation in Acumatica

Step 2: Check the shipping mapping (A-M) from Magento.

Shipping Methods Mapping(A>M)

Scope: All Store Views

Update Schema Map Shipping Methods

It's time to change your password.

Filters Default View Columns

Actions 4 records found 50 per page 1 of 1

Actions	Acumatica Shipvia	Magento Shipping Carrier	Magento Shipping Title	Store View
<input type="checkbox"/>	UPS Ground [UPSGROUND]	Flat Rate [flatrate]	Flat Rate - Fixed	All Store Views
<input type="checkbox"/>	FedEx Ground [FEDEXGROUND]	Best Way [bestway]	Best Way - Table Rate	All Store Views
<input type="checkbox"/>	Will Call [WILLCALL]	Flat Rate [flatrate]	Flat Rate - Fixed	All Store Views
<input type="checkbox"/>	Local Delivery Service [LOCAL]	Free Shipping [freeshipping]	Free Shipping - Free	All Store Views

Check the Shipping Mapping in Magento

Step 3. Go back to Shipping details in Acumatica Sales Order and select the shipment.

Acumatica

Search...

Revision Two Products Products Wholesale 10/27/2023 2:50 AM admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

QUICK PROCESS CREATE SHIPMENT HOLD

Order Type: SO Customer: AACUSTOMER - Alta Ace Ordered Qty: 2.00

Order Nbr: <NEW> Location: MAIN - Primary Location Discount Total: 0.00

Status: Open Contact: Amelia Armstrong VAT Exempt To: 0.00

Date: 10/27/2023 Currency: USD 1.00 VIEW BASE VAT Taxable To: 0.00

Requested On: 10/27/2023 Project: X - Non-Project Code Tax Total: 0.00

Customer Ord: Order Total: 40.00

External Refer: Description:

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS MAGENTO CONNECTOR DATA

DELIVERY SETTINGS ORDER SHIPPING SETTINGS

Ship Via: local SHOP FOR RATES

Delivery Confirmation: LOCAL Local Delivery Service

Endorsement: Shipping Rule: Back Order Allowed

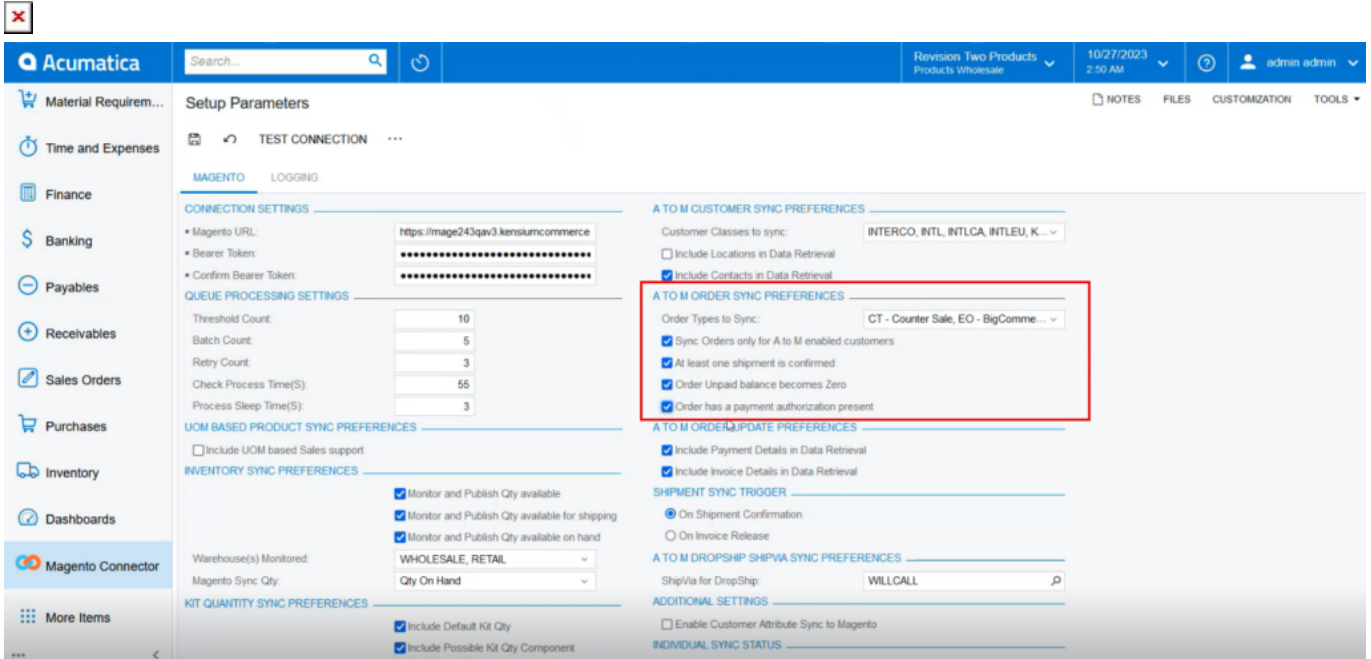
FOB Point: Cancel By: 10/27/2023 Canceled

Priority: 0 Preferred Warehouse ID:

Shipping Terms: Shipping Zone: Residential Delivery Saturday Delivery Insurance

Select the Shipment

Step 4. Go to [Setup Parameters] to check [A-M Order Sync Preferences]. Any of the 3 conditions should match to sync the data.



The screenshot shows the Acumatica Setup Parameters screen. The left sidebar contains various navigation options like Material Requirements, Time and Expenses, Finance, Banking, Payables, Receivables, Sales Orders, Purchases, Inventory, and Dashboards. The main area is titled 'Setup Parameters' and includes a 'TEST CONNECTION' button. The 'MAGENTO' tab is selected, showing various settings. The 'A TO M ORDER SYNC PREFERENCES' section is highlighted with a red box. It contains the following settings:

- Order Types to Sync: CT - Counter Sale, EO - BigComme...
- ☒ Sync Orders only for A to M enabled customers
- ☒ At least one shipment is confirmed
- ☒ Order Unpaid balance becomes Zero
- ☒ Order has a payment authorization present

A To M Order Sync Preferences

Step 5. From payment check the unpaid balance amount. If it's not 0.00 to satisfy the criteria create a payment record to change the unpaid balance to 0.00.

Step 6. To check the sync status, go to Reports > Connector Log the following screen will appear.

Acumatica

Search...

Revision Two Products
Products Wholesale

10/27/2023
2:52 AM

admin admin

CUSTOMIZATION TOOLS

Material Requirements Planning

Time and Expenses

Finance

Banking

Payables

Receivables

Sales Orders

Purchases

Inventory

Dashboards

Magento Connector

More Items

Connector Logs

Action Type: From Date: From Time:

Level: To Date: To Time:

Message: SOT00024

Level	Action Type	Message
INFO	Order Sync	["orders":{"OrderID":"SOT00024","OrderType":"SO","CustomerID":"AACUSTOMER","Email":"ap@altaas.com","Status":"Open","Branch":"PROOWHOLE","LastModifiedOn":"2023-10-27T00:00:00","IsB2B":false,"IsStaffCustomer":false},"Query":"SAL ESORDER STATUS","CompanyID":"Company","C":"b3344897-027e-4d59-b5c3-1bd0d0f47b9f","TimeStamp":"133428739107273074","AdditionalInfo":{"PXPPerformanceInfoStartTime":"10/27/2023 12:00:00 AM"}}]
INFO	Order Sync	["orders":{"OrderID":"SOT00024","OrderType":"SO","CustomerID":"AACUSTOMER","Email":"ap@altaas.com","Status":"Open","Branch":"PROOWHOLE","LastModifiedOn":"2023-10-27T00:00:00","IsB2B":false,"IsStaffCustomer":false},"Query":"SAL ESORDER STATUS","CompanyID":"Company","C":"b3344897-027e-4d59-b5c3-1bd0d0f47b9f","TimeStamp":"133428739107273074","AdditionalInfo":{"PXPPerformanceInfoStartTime":"10/27/2023 12:00:00 AM"}}]

Acumatica Connector Log

Step 7. Go to Magento Connector Log to check the Order Sync Status.

Connector Logs

It's time to change your password.

1234 records found


Filters Default View Columns

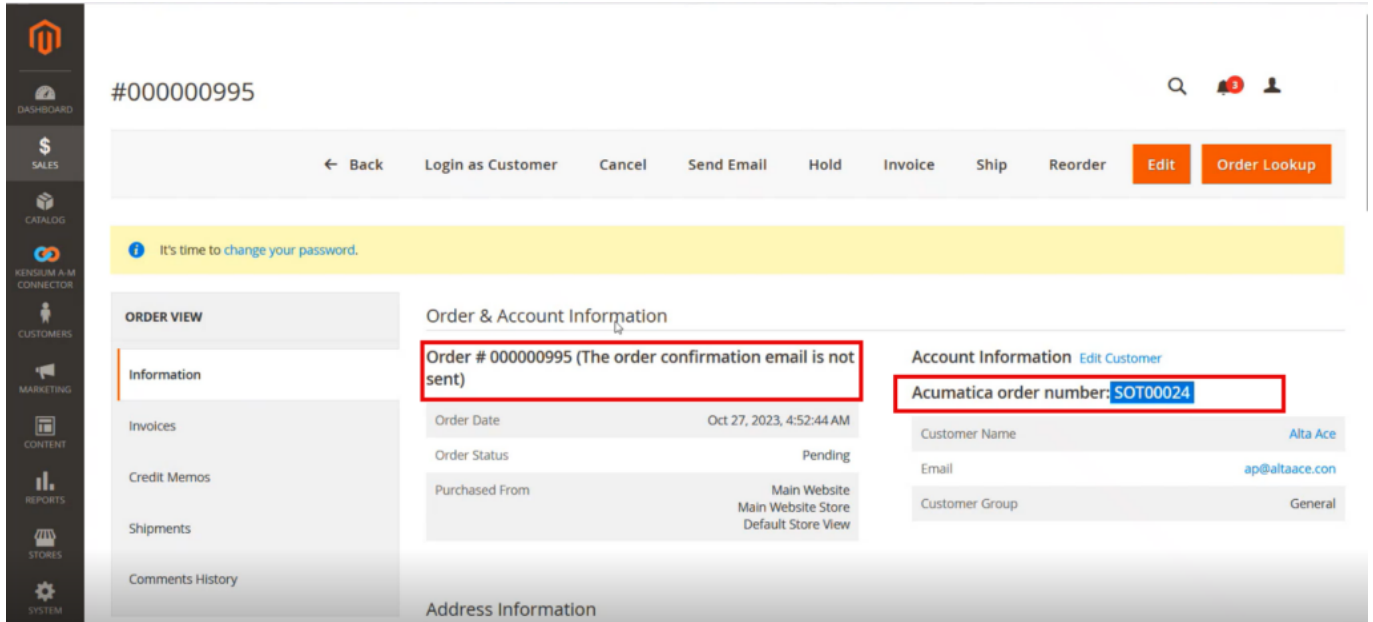
100 per page 1 of 13

Log Id	Start Time	Complete Time	Group	Action	Sync Direction	Result	Entity Id	Notes	Action
1185160	Oct 27, 2023 4:52:47 AM	Oct 27, 2023 4:52:49 AM	Order	Create	Acumatica to Magento	Failure		SOT00024	View
1185159	Oct 27, 2023 4:52:39 AM	Oct 27, 2023 4:52:47 AM	Order	Create	Acumatica to Magento	Success	1093	SOT00024	View
1185158	Oct 27, 2023 4:52:47 AM	Oct 27, 2023 4:52:47 AM	Order	Publisher	Acumatica to Magento	Success		SOT00024	View
1185157	Oct 27, 2023 4:51:52 AM	Oct 27, 2023 4:51:52 AM	Order	Publisher	Acumatica to Magento	Success		SOT00024	View
1185156	Oct 27, 2023 4:51:51 AM	Oct 27, 2023 4:51:51 AM	Order	Publisher	Acumatica to Magento	Success		SOT00024	View
1185155	Oct 27, 2023 4:51:12 AM	Oct 27, 2023 4:51:13 AM	Inventory	Update	Acumatica to Magento	Success	4861	WATER2809	View
1185154	Oct 27, 2023 4:50:44 AM	Oct 27, 2023 4:50:44 AM	Inventory	Publisher	Acumatica to Magento	Success		WATER2809	View

manual Highlight All Match Case Match Diacritics Whole Words 6 of 8 matches

Order Creation is Successful

 Step 8: Click on [View] and go to the Order. You can view the Acumatica and Magento Order Number in the Order Screen.



The screenshot shows the Adobe Connector interface for viewing an order. The top navigation bar includes a sidebar with icons for Dashboard, Sales, Catalog, KESUM A-M CONNECTOR, Customers, Marketing, Content, Reports, Stores, and System. The main header displays the order number #000000995 and a search icon. Below the header is a toolbar with buttons: Back, Login as Customer, Cancel, Send Email, Hold, Invoice, Ship, Reorder, Edit, and Order Lookup. A yellow banner message states: "It's time to change your password." The main content area is divided into two sections: "ORDER VIEW" on the left and "Order & Account Information" on the right. The "ORDER VIEW" section has a sub-menu with "Information", "Invoices", "Credit Memos", "Shipments", and "Comments History". The "Order & Account Information" section contains two tables. The first table, "Order & Account Information", lists the Order # 000000995 (highlighted with a red box), Order Date (Oct 27, 2023, 4:52:44 AM), Order Status (Pending), and Purchased From (Main Website, Main Website Store, Default Store View). The second table, "Account Information", lists the Acumatica order number: SOT00024 (highlighted with a red box), Customer Name (Alta Ace), Email (ap@altaace.com), and Customer Group (General).

Order & Account Information	
Order # 000000995 (The order confirmation email is not sent)	
Order Date	Oct 27, 2023, 4:52:44 AM
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View

Account Information	
Acumatica order number:	SOT00024
Customer Name	Alta Ace
Email	ap@altaace.com
Customer Group	General

Acumatica Order Number and Magento Order Number

Step 9. Go to Acumatica sales order to create the Shipment.

Acumatica

Search...

Revision Two Products
Products Wholesale

10/27/2023
2:54 AM

admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Sales Orders
SO SOT00024 - Alta Ace

QUICK PROCESS CREATE SHIPMENT HOLD

Order Type: SO
Order Nbr.: SOT00024
Status: Open
Date: 10/27/2023
Requested On: 10/27/2023
Customer Ord.:
External Refer.:
Description:

Customer: AACUSTOMER - Alta Ace
Location: MAIN - Primary Location
Contact: Amelia Armstrong
Currency: USD 1.00
Project: X - Non-Project Code

Ordered Qty.: 2.00
Discount Total: 0.00
VAT Exempt To: 0.00
VAT Taxable To: 0.00
Tax Total: 0.00
Order Total: 40.00

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING

Is Magento Order
Magento OrderID: 00000995
Magento Order Tax Rate: 0.000000
Magento Tax Total: 0.000000
Store Credit Amount: 0.000000
Store Credit Balance: 0.000000
Purchase Store:
Breakdown Amount:
Is Store Credit Adjusted

RELATIONS TOTALS MAGENTO CONNECTOR DATA

Specify Shipment Parameters

Shipment Date: 10/27/2023
Warehouse ID: RETAIL - Retail Warehouse

OK

Create the Shipment

Step 10: Confirm the Shipment and Release the Invoice.

Acumatica

Search...

Revision Two Products
Products Wholesale

10/27/2023
2:54 AM

admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Shipments
005139 - Alta Ace

CONFIRM SHIPMENT HOLD

Shipment Nbr.: 005139
Type: Shipment
Status: Open
Operation: Issue
Shipment Date: 10/27/2023
Description:

Customer: AACUSTOMER - Alta Ace
Location: MAIN - Primary Location
Warehouse ID: RETAIL - Retail Warehouse
Workgroup:
Owner: Maxwell Baker

Shipped Quant.: 2.00
Shipped Weight: 0.000000
Shipped Volume: 0.000000
Packages: 0
Package Weight: 0.250000

DETAILS ORDERS SHIPPING PACKAGES


Order Type	Order Nbr.	Inventory ID	Free Item	Warehouse	Location	UOM	Shipped Qty.	Ordered Qty.	Open Qty.	Picked Qty.	Packed Qty.	Lot/Serial Nbr.
SO	SOT00024	WATER2809		RETAIL	STORAGE	BOTTLE	2.00	2.00	0.00	0.00	0.00	

On Hand 263.00 BOTTLE, Available 139.00 BOTTLE, Available for Shipping 139.00 BOTTLE

Click on Confirm Shipment



Step 11: Go to the Connector Log and it should be published unless you see any error. Shipment and invoices are created in Acumatica, however, the returns will take place in Magento.



- DASHBOARD
- SALES
- CATALOG
- KENSUM A-M CONNECTOR
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES

Connector Logs

It's time to change your password.


1245 records found

Filters Default View Columns

100 per page 1 of 13

Log Id	Start Time	Complete Time	Group	Action	Sync Direction	Result	Entity Id	Notes	Action
1185171	Oct 27, 2023 4:54:57 AM	Oct 27, 2023 4:54:57 AM	Shipment	Publisher	Acumatica to Magento	Success		000000995	View
1185170	Oct 27, 2023 4:54:19 AM	Oct 27, 2023 4:54:20 AM	Order	Update	Acumatica to Magento	Success		SOT00024	View
1185169	Oct 27, 2023 4:54:13 AM	Oct 27, 2023 4:54:19 AM	Order	Update	Acumatica to Magento	Success		SOT00024	View
1185168	Oct 27, 2023 4:54:17 AM	Oct 27, 2023 4:54:17 AM	Order	Publisher	Acumatica to Magento	Success		SOT00024	View
1185167	Oct 27, 2023 4:54:17 AM	Oct 27, 2023 4:54:17 AM	Orderstatus	Publisher	Acumatica to Magento	Success		000000995	View
1185166	Oct 27, 2023 4:54:13 AM	Oct 27, 2023 4:54:14 AM	Inventory	Update	Acumatica to Magento	Success	4861	WATER2809	View
1185165	Oct 27, 2023 4:54:13 AM	Oct 27, 2023 4:54:13 AM	Orderstatus	Update	Acumatica to Magento	Success	1093	000000995	View

manual Highlight All Match Case Match Diacritics Whole Words 6 of 8 matches



- DASHBOARD
- SALES
- CATALOG
- KENSUM A-M CONNECTOR
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES

Connector Logs

It's time to change your password.

1247 records found

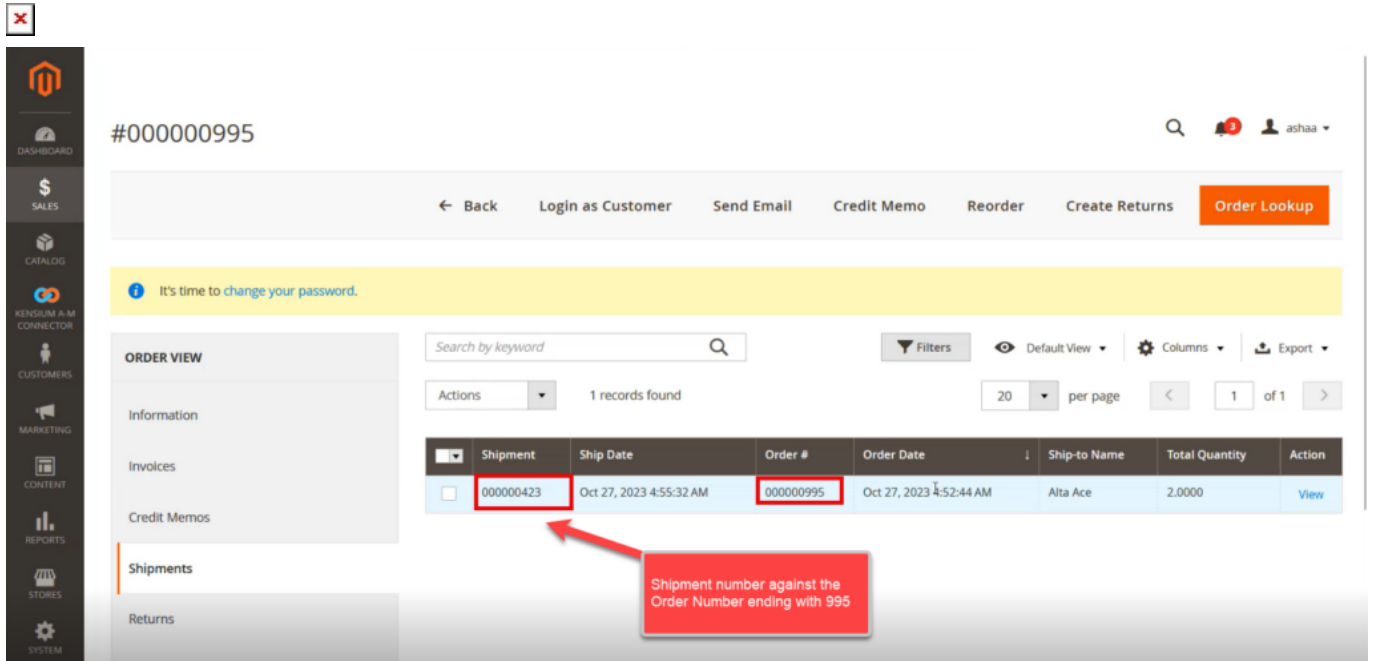
Filters Default View Columns

100 per page 1 of 13

Log Id	Start Time	Complete Time	Group	Action	Sync Direction	Result	Entity Id	Notes	Action
1185173	Oct 27, 2023 4:55:32 AM	Oct 27, 2023 4:55:34 AM	Shipment	Create	Acumatica to Magento	Success	458	000000995	View
1185172	Oct 27, 2023 4:55:32 AM	Oct 27, 2023 4:55:32 AM	Orderstatus	Update	Acumatica to Magento	Failure	1093	000000995	View
1185171	Oct 27, 2023 4:54:57 AM	Oct 27, 2023 4:54:57 AM	Shipment	Publisher	Acumatica to Magento	Success		000000995	View
1185170	Oct 27, 2023 4:54:19 AM	Oct 27, 2023 4:54:20 AM	Order	Update	Acumatica to Magento	Success		SOT00024	View
1185169	Oct 27, 2023 4:54:13 AM	Oct 27, 2023 4:54:19 AM	Order	Update	Acumatica to Magento	Success		SOT00024	View
1185168	Oct 27, 2023 4:54:17 AM	Oct 27, 2023 4:54:17 AM	Order	Publisher	Acumatica to Magento	Success		SOT00024	View
1185167	Oct 27, 2023 4:54:17 AM	Oct 27, 2023 4:54:17 AM	Orderstatus	Publisher	Acumatica to Magento	Success		000000995	View

manual Highlight All Match Case Match Diacritics Whole Words 6 of 8 matches

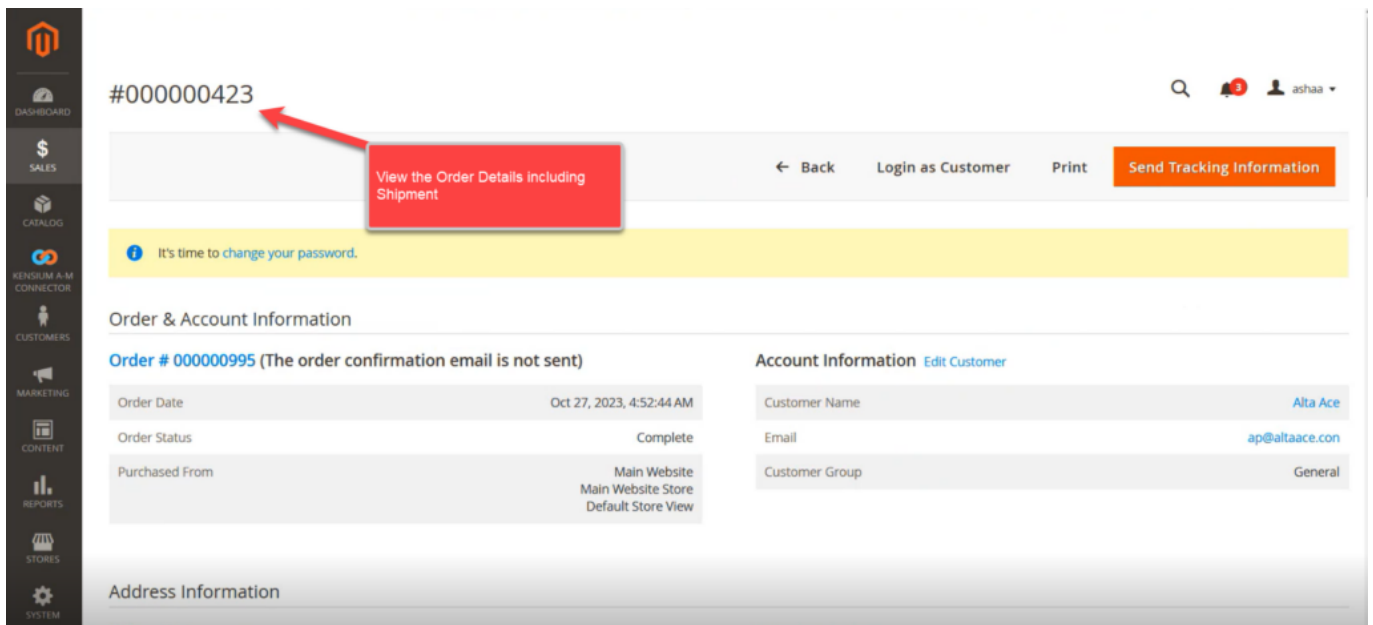
Shipment Created in Magento



The screenshot shows the Magento Order View interface for order #000000995. The left sidebar contains navigation links: DASHBOARD, SALES, CATALOG, KENDUM A-M CONNECTOR, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, and SYSTEM. The main content area displays the order details. A yellow banner at the top indicates "It's time to change your password." Below this, the "ORDER VIEW" section shows a search bar, filters, and a table of shipments. A red box highlights the shipment number "000000423" in the "Shipment" column, with a red arrow pointing to it from a red text box that says "Shipment number against the Order Number ending with 995".

Shipment	Ship Date	Order #	Order Date	Ship-to Name	Total Quantity	Action
<input type="checkbox"/> 000000423	Oct 27, 2023 4:55:32 AM	000000995	Oct 27, 2023 4:52:44 AM	Alta Ace	2.0000	View


Shipment Number against the Order Number

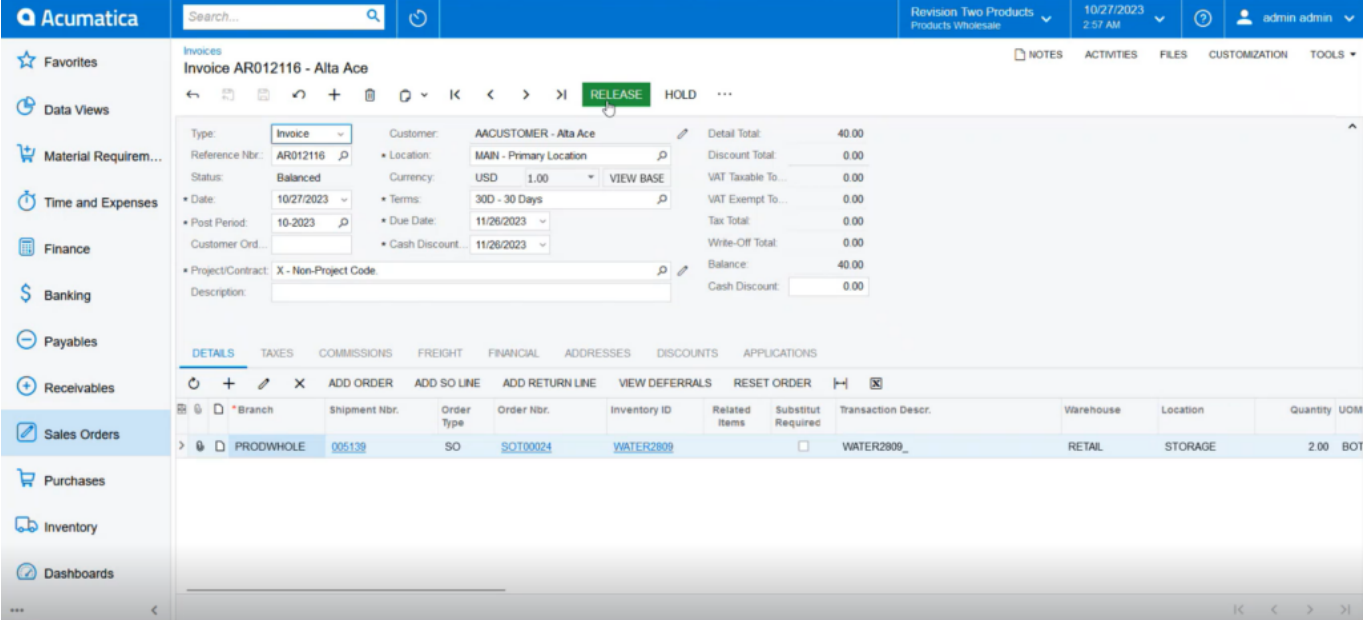


The screenshot shows the Magento Order & Account Information interface for order #000000423. The left sidebar is the same as the previous screenshot. The main content area displays the order details. A red box highlights the order number "000000423" in the "Order # 000000995 (The order confirmation email is not sent)" section, with a red arrow pointing to it from a red text box that says "View the Order Details including Shipment".

Order & Account Information	
Order # 000000995 (The order confirmation email is not sent)	
Order Date	Oct 27, 2023, 4:52:44 AM
Order Status	Complete
Purchased From	Main Website Main Website Store Default Store View
Account Information Edit Customer	
Customer Name	Alta Ace
Email	ap@altaace.com
Customer Group	General

Shipment Details Screen

 Step 12: Now Release the Invoice. After you release the invoice, the trigger will take place from Acumatica.



Acumatica Search... Revision Two Products Products Wholesale 10/27/2023 2:37 AM admin admin

Invoices Invoice AR012116 - Alta Ace NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

← ↻ + ⌵ K < > | **RELEASE** HOLD ...

Type: **Invoice** Customer: AACUSTOMER - Alta Ace Detail Total: 40.00
 Reference Nbr.: AR012116 Location: MAIN - Primary Location Discount Total: 0.00
 Status: **Balanced** Currency: USD 1.00 VIEW BASE VAT Taxable To: 0.00
 Date: 10/27/2023 Terms: 30D - 30 Days VAT Exempt To: 0.00
 Post Period: 10-2023 Due Date: 11/26/2023 Tax Total: 0.00
 Customer Ord.: Cash Discount: 11/26/2023 Write-Off Total: 0.00
 Project/Contract: X - Non-Project Code Balance: 40.00
 Description: Cash Discount: 0.00

DETAILS TAXES COMMISSIONS FREIGHT FINANCIAL ADDRESSES DISCOUNTS APPLICATIONS

⌵ + ✎ ✕ ADD ORDER ADD SO LINE ADD RETURN LINE VIEW DEFERRALS RESET ORDER

Branch	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Related Items	Substitut Required	Transaction Descr.	Warehouse	Location	Quantity	UOM
PRODWHOLE	005139	SO	SOT00024	WATER2809		<input type="checkbox"/>	WATER2809_	RETAIL	STORAGE	2.00	BOT

Release the Invoice

Step 13: Go to the Magento connector log for the update.



DASHBOARD

SALES

CATALOG

KENSUM A-M CONNECTOR

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

Connector Logs

It's time to change your password.

Filters

Default View

Columns

1254 records found

100 per page 1 of 13

Log Id	Start Time	Complete Time	Group	Action	Sync Direction	Result	Entity Id	Notes	Action
1185180	Oct 27, 2023 4:57:36 AM	Oct 27, 2023 4:57:38 AM	Order	Update	Acumatica to Magento	Success		SOT00024	View
1185179	Oct 27, 2023 4:57:33 AM	Oct 27, 2023 4:57:36 AM	Order	Update	Acumatica to Magento	Success		SOT00024	View
1185178	Oct 27, 2023 4:57:33 AM	Oct 27, 2023 4:57:34 AM	Inventory	Update	Acumatica to Magento	Success	4861	WATER2809	View
1185177	Oct 27, 2023 4:57:33 AM	Oct 27, 2023 4:57:33 AM	Customer	Publisher	Magento to Acumatica	Success		vinoddemo2@mailinator.com	View
1185176	Oct 27, 2023 4:57:03 AM	Oct 27, 2023 4:57:03 AM	Inventory	Publisher	Acumatica to Magento	Success		WATER2809	View
1185175	Oct 27, 2023 4:57:00 AM	Oct 27, 2023 4:57:00 AM	Order	Publisher	Acumatica to Magento	Success		SOT00024	View
1185174	Oct 27, 2023 4:56:45 AM	Oct 27, 2023 4:56:45 AM	Order	Publisher	Acumatica to Magento	Success		SOT00024	View

Order Updated in Magento Connector

DASHBOARD

SALES

CATALOG

KENSUM A-M CONNECTOR

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

#000000995

← Back

Login as Customer

Send Email

Credit Memo

Reorder

Create Returns

Order Lookup

It's time to change your password.

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Returns

Order & Account Information

Order # 000000995 (The order confirmation email is not sent)

Order Date

Oct 27, 2023, 4:52:44 AM

Order Status

Complete

Purchased From

Main Website
Main Website Store
Default Store View

Account Information

Edit Customer

Acumatica order number: SOT00024

Customer Name

Alta Ace

Email

ap@altaace.com

Customer Group

General

Address Information