2. Odoo Integration User Guides

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via our email address below.

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Introduction

Entities type which can appear in log: customer, product, lead, order, invoice, memo, tax code, shipping method.

Feature

- Synchronize customers from Magento 2 to Odoo as contacts, manually or automatically
- Synchronize customers from Magento 2 to Odoo as leads
- Synchronize products from Magento 2 to Odoo, manually or automatically
- Synchronize store categories from Magento 2 to Odoo
- Synchronize orders, invoices and credit memos from Magento 2 to Odoo, manually or automatically
- Synchronize tax rates from Magento 2 to Odoo
- Synchronize shipping methods from Magento 2 to Odoo
- Map Magento 2 payment methods with Odoo payment journals
- View sync history and resync failed requests
- Manage sync queue

System requirements

Your Magento 2 should be running on:

- Magento Open Source 2.2.x, 2.3.x
- Magento Commerce 2.2.x, 2.3.x

Your Odoo company should be running on:

- Odoo Community v12
- Odoo Enterprise v12

Your Odoo company should have the following apps:

- Contacts (for customer sync)
- CRM (for lead sync - optional)
- Sales (for product and order sync)
- Inventory (for product qty sync - optional)
- Ecommerce (for category sync - optional)
- Invoicing (for invoice and credit memo sync)

Configuration

Connect with Odoo

- Ensure your Odoo site is running.
- On the backend, navigate to **Odoo > Configuration**, or **Stores > Configuration > Magenest > Odoo Integration.**
- On the **Configuration** page, under **Connection Settings** section, fill in the connection parameters.

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- **URL**: Odoo base URL.
- **Port**: Odoo port. The common ports are 80 (http) and 443 (https).
- **Database Name**: enter the name of Odoo database (an Odoo installation might have multiple databases).
- **Admin Username** and **Password**: credentials of Odoo admin account.

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- Then press Check Connection. If connection success, the ID of admin account will be saved into ‘Odoo User ID’ field.
- Then click on **Save Config** button to store connection data.

Synchronization Settings

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Sync Mode and Time (similar for all entities)

- **Immediate**: immediate sync from backend/frontend.
- **Cron job**: add entity to queue and sync once every X minutes (X = Time setting).

Customer

- **Sync after edit**: trigger synchronization after customer or admin edit.
- **Sync leads**: also sync customers as leads.
- **Lead Name Prefix**: will be added to the name of Lead on Odoo (format: prefix + customer name).

Product

⚠️ Note: There are some types of product which are synced: simple, virtual, downloadable, configurable, bundle.

- **Sync product qty**: product quantity will be synced as a product moves on Odoo Inventory. If **Sync product qty** is enabled, there will be two fields:
    - **Fetch Stock Locations**: get the list of stock locations on Odoo company.
    - **Sync to Stock**: select stock location to sync product quantity.
- **Sync category**: sync product categories as Ecommerce categories on Odoo, and assign those categories to Odoo product.

Order

- **Enabled:** enable/disable syncing orders.
- **Prefix**: order prefix. Order name on Odoo will follow format Prefix+IncrementID.

Invoice

- Enabled: enable/disable syncing invoices.
- Prefix: invoice prefix. Invoice name on Odo will follow format Prefix+IncrementID.

Credit memo

- Enabled: enable/disable syncing credit memo.
- Prefix: Memo prefix. Memo name on Odo will follow format Prefix+IncrementID.

⚠️ **Note**: Invoice and Memo prefix must be different.

Debug Settings

Enable/disable saving all sync requests and responses to [site root]/var/log/odoo/debug.log.

This log contains connection credentials (url, host, db, username, password).

Mapping

Mapping Payment Journals

This section is required for invoice/memo synchronization.

When an invoice/memo is synced from Magento to Odoo, its payment entity will be linked to an Odoo journal based on mapping of payment methods Magento.

On the backend, navigate to **Odoo > Mapping Payment Journals.**

- Step 1: Click **Add Payment Methods** to get the list of methods on Magento 2.
- Step 2: Click **Get Journals** to get the list of journals on Odoo company.
- Step 3: Click on **Map to Journal** field to map Journal with the method. Mapping is saved automatically.

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Sync shipping methods

This section is required for order/invoice/memo synchronization.

Navigate to **Odoo > Shipping Methods > Synchronize.**

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On Odoo, you can find synced methods at **Sales > Configuration > Delivery Methods.**

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Tax Mapping

This section is required for order/invoice/memo synchronization.

Navigate to **Odoo > Tax Code Mapping > Add All Tax Codes > Synchronize.**

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On Odoo, you can view the list of tax codes at **Invoicing > Configuration > Taxes**:

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Sync Queue

Queue management is accessible from **Odoo > Sync Queue**. Queue contains:

- Entities with Sync mode Cron Job waiting for sync.
- Entities added by admin.

To add entities from **Queue**, choose any of the buttons above to open **Add to Queue** dialog:

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Select creation date range (with transactions) or last modified range (with customers/products) to add them to queue. Either or both date fields can be skipped (if both are skipped, all entities will be added to Queue)

To sync entities in Queue, wait for the cron to run, or use **Sync Now** button or Mass Action to sync them immediately.

History Logs

From **Odoo > History Logs**, admin can view log of synced entities:

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There are 3 statuses of the logs:

- **Success**: synced to Odoo without errors.
- **Skip**: already exist on Odoo and doesn't need resyncing.
- **Failed**: failed syncs.

Re-Sync All button: resync all logs with **failed** status (skip success/skip statuses).

To sync single or several entities in log, use **Mass Action.**

Update

- When a bug fix or new feature is released, we will provide you with the module's new package.
- All you need to do is repeating the above installing steps and uploading the package onto your store. The code will automatically override.
- Flush the config cache. Your store and newly installed module should be working as expected.

Support

- We will reply to support requests after **2 business days**.
- We will offer **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.