Magento 1 Integration Manual (Version 2.2.2 - 13/10/2017)

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Introduction

Megaventory Overview

Megaventory™ from Megaventory Inc. is web-based software that manages the flow of products and creates purchase & sales orders, inventory transaction documents, invoices, work orders (to manufacture finished goods from raw materials) and generates inventory, sales and manufacturing reports. Megaventory can be set-up and running in minutes even by users who do not have significant experience in working with purchasing & sales software, managing inventory or dealing with complicated business operations. Megaventory is a web-based application and is accessible from any location and by any device, desktop (PC or MAC), laptop, mobile or tablet. This can significantly improve the way remote personnel interact with the products, the inventory locations, and the business operations. Moreover, no software installation is necessary: everything runs on a web browser.

Magento Overview

The Magento™ community edition from eBay Inc. is leading open source eCommerce software that delivers powerful, flexible features that address the full range of eCommerce needs.

The Magento Community Edition is open source software and can be downloaded for free from http://magento.com. Developers can modify the core code and add features and functionality by installing extensions from the Magento Connect marketplace.

Integration Specifics

Case 1 - I am already using Magento and want to start using Megaventory

This article covers the case of a company that is already using the Magento eCommerce software and has all its data entities (products, product categories, clients etc.) in the Magento database. The Megaventory account is empty of data (either new or after a reset operation). If you already have an active Megaventory subscription and want to start using the Magento ecommerce software please move on to the next section.

Preliminary Step – Necessary settings in Magento

The following Magento settings need to be correctly set for the correct interoperability between Megaventory and Magento:

Cron Job (Unix)

Cron jobs, or scheduled tasks, must be enabled in order for the Megaventory extension to operate properly. By default if the Magento installation is running on a UNIX OS the OS should automatically recognize Magento's requests to use the CRON TAB service. The crontab service command can be used if shell access is granted to the server or added through cPanel or a similar admin tool. The crontab should have rows that look similar to one of these:

```
* * * * * /bin/sh /[mage_dir]/cron.sh
* * * * * /bin/bash /[mage_dir]/cron.sh
* * * * * php -f /[mage_dir]/cron.php
* * * * * /usr/bin/php /[mage_dir]/cron.php
* * * * * /usr/local/bin/php -f /[mage_dir]/cron.php
```

Inventory Settings

The Inventory Settings in the Magento software can be found by navigating to System > Configuration > [Catalog > Inventory (left menu)]. The **Decrease Stock When product in Placed** option (see figure below) will control whether non-shipped items in Sales Orders (a Pending Sales Order in Magento is equivalent to a Verified Sales Order in Megaventory) will be accounted for in the Global Stock. If this option is set to **Yes**, the Global Stock will decrease immediately when a Sales Order is placed. If this option is set to **No**, Global Stock decreases only when items are shipped against the Sales Order. The Manage Stock option (see figure below) should be set to **Yes**.

Step 1 - Signing up for a Megaventory account

A new Megaventory account should be created here.

After signing up for the first time the user will see the initial Setup page (**Admin** > **Account Setup**) as shown in the figure below.

Account Setup

Use Language Pack	English

- ☑ Enable Sales and Purchase Orders ❓
- ☑ Enable Sales Order Quotes ❓

Sales Order - Numbering Scheme ❓   Automatic (Edit Document Type)

Purchase Order - Numbering Scheme ❓   Manual (Edit Document Type)

- ☑ Enable Works (manufacturing) ❓
- ☑ Show Taxes in Documents (Sales Quotes, Orders and Invoices) ❓
- ☑ Show Discounts in Documents (Sales Quotes, Orders and Invoices) ❓
- ☐ Enable user access permissions to be based on Clients/Suppliers. ❓

|	
Number Format	○ 10,999.99 ◉ 10.999,99
Time Zone	(GMT - 12:00) Enitwetok, Kv
Company	Megaventory, Inc. *
Address	PO Box 170436
Zip	TX 78717
City	Austin
Phone	
Tax ID	
Country	UNITED STATES
State	Texas
Company/Organization Logo ❓	Click to Upload

Save

Extra help while filling out the form can be obtained by hovering with the mouse over the bubble icon next to each specific field.

The **Enable Sales and Purchase Orders** option should be set. **The Enable Works (Manufacturing)** option should be set if at least one product of type **Bundle** exists in the Magento store.

Finally, it is strongly recommended that the **Numbering Scheme** of the Sales Order document is set to automatic numbering. By doing so, all the Sales Orders coming from Magento will receive an **Order Reference Number** (the sales order number of Magento) and the sales order numbering scheme of Megaventory will be independent from the sales order numbering scheme of Magento. This also makes Megaventory ready to accept Sales Orders from other sales channels as well (other e-commerce software, manual sales orders through phone, etc.). If the **Numbering Scheme** of the Sales Order document is set to manual numbering, the Magento Sales Order number will be used also in Megaventory. The latter option should be selected if your Megaventory account will receive orders from the Magento store only. After completing the initial Setup the user should click Save and then navigate to **Profile Icon > Company & Billing (Admin) > Users**.
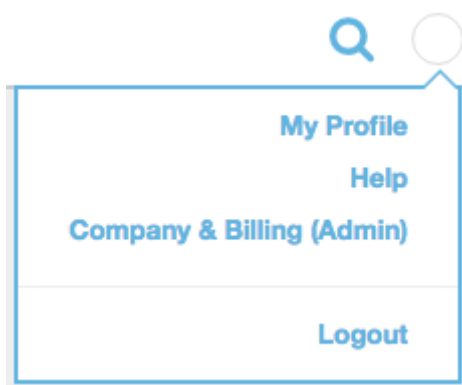
The administrator username should be clicked. This action will bring up the definition of the user as seen in the figure below.

Clicking on the **key** icon will generate a new random key for the specified user entity. The reader shall keep a record of the generated key; it will be used in Step 5 later on. Finally, the **Update** button should be clicked to save/update the user entity.

The API key grants access to Magento so as to update the data of the Megaventory account. Therefore, the API key should be treated as a password.

The trial account of Megaventory supports up to 5000 product SKUs and 5000 customers. If your Magento store has more than 5000 products or customers, please contact Megaventory support at support@megaventory.com to raise those limitations for the evaluation period of the Megaventory account.

Step 2 - Activating the Magento integration in Megaventory

To use the Magento eCommerce software, the appropriate flag has to be set in the **Account Integrations** module of Megaventory. This module lies under **Profile Icon > Company & Billing (Admin) > Integrations** and handles the few settings involved in integrating

Megaventory to any 3rd party software. Extra help while filling out the form can be obtained by hovering with the mouse over the bubble icon next to each specific field.

When ready, the user should save the form by clicking the **Save** option.

Step 3 - Installation & Activation of the Megaventory extension in Magento

You need to Start the Component Manager in your Magento store first. To do this follow these simple, official instructions by Magento.

You then need to 'purchase' the free Megaventory Magento extension from the Magento Marketplace. To do that visit the Megaventory Magento extension page in the Magento Marketplace and click at Add to Cart. Follow the steps for the checkout process (you may need to create an account in the Magento Marketplace and login if you haven't already).

When you have completed the checkout, go back to your Magento site and install the

Megaventory Magento extension by following these simple, official Magento [instructions](#).

Step 4 - Synchronizing the initial data from Magento to Megaventory

After the extension is successfully installed, a new **Megaventory** menu item appears. Under the **Settings** tab the user will find the **Connectivity** panel as well as the **Setup Wizard** panel that starts the synchronization process with the newly created Megaventory account.

Connectivity Tab

If the **Megaventory Extension** option is set to **Enabled**, then the Magento installation will send and receive data with every Magento action that needs to communicate data to Megaventory. Setting the **Megaventory Extension** option to **Disabled** will effectively disable all the functionalities the module. For the Setup Wizard to finish successfully, the option should be set to **Enabled**.

The **API URL** should be set to:

https://api.megaventory.com/v2017a/json/reply/

and finally, the **API Key** is the key generated at step 1 above.

When the user clicks the **Update** button, a success notification icon appears when all settings have been correctly inserted and connection between Magento and Megaventory has been established. When a proper connection between Magento and Megaventory cannot be established, a Connectivity Failed icon appears and an explanation message of the error(s) is displayed. All errors have to be corrected before starting the **Data Initialization** process.

The **Order Synchronization** checkbox is initially disabled and will be automatically enabled when the Setup Wizard ends successfully. While this option is unchecked, no sales orders are sent to Megaventory from Magento. This option should be enabled only when the inventory quantities of Magento and Megaventory are synchronized (after the Setup Wizard ends successfully).

Setup Wizard Tab

The Setup Wizard module is displayed in the figure below. Before starting the process, the user has to choose codes for a **Shipping Product SKU** and a **Discount Product SKU** (for example: "shipping001" and "Discount001"). These "virtual" products will be added in Megaventory with infinite quantities and will handle the Magento shipping charges and order discounts respectively. The **Discount Product SKU** will be added in the sales order

form of Megaventory (as a product with negative price) if there is a discount in a Magento order.

As soon as the user clicks the Start button, the synchronization process starts. The process automatically sends and receives the following entities to and from Megaventory:

1. **Inventory Locations (for example stores, warehouses etc.)**
2. **Supporting entities (creates a virtual 'shipping' and 'discount' product and a default 'Magento Guest' client to handle those clients that use the Magento shopping cart without subscribing as a registered user)**
3. **Product Categories**
4. **Products**

In case some entities fail for any possible reason (for example, connectivity is temporarily lost etc.) a log is written to the event database of the Megaventory extension. The log is available under the Log option under the **Megaventory** menu tab in the Magento software. If for any reason, the setup does not finish successfully, the user may refresh the page and start over.

When the synchronization process ends, the user should click on Yes in order to import the Magento global stock (inventory quantities) to Megaventory. This process will generate a CSV file containing the Magento product quantities which can then be uploaded to Megaventory.

After clicking Yes, the Inventory Location of Megaventory (that will initially receive the Magento quantity information) has to be selected. Note that, since Megaventory supports multiple Inventory Locations, product quantities can be later distributed between Inventory Locations from the Megaventory software; inventory information will always be synced to the Magento software in any case.

Finally, by clicking **Export Initial Stock CSV**, a CSV (text) file will be generated by Magento. The user should download the file and save it locally in his/her computer. The file contains a snapshot of the current Magento inventory information (global stock: products with their associated inventory quantities) (see Step 6).

The file should be imported/uploaded to Megaventory as soon as it is generated. That will ensure that no Sales Orders are created from Magento front end users during this period and therefore no stock discrepancies will be generated. Ideally, the Magento front-end must be temporarily disabled to ensure no orders are placed by front-end users during this period.

Step 5 - Importing the current Magento quantities in Megaventory

The CSV file is handled by the Inventory Taking module (under the Inventory tab) of Megaventory.

The process usually starts by downloading the excel file and filling it with data. Since the file has been automatically generated by Magento in the previous step, the user should directly proceed to the last step of the Inventory Taking process.

Once the file is uploaded to Megaventory the quantities are adjusted in the selected Inventory Location. The quantities are now synchronized.

Step 6 - Setting up final data

As soon as the inventory file is uploaded to Megaventory, the user shall navigate to the Megaventory > Settings menu tab in the Magento back-end and enable the **Order Synchronization** checkbox. While this option is unchecked, no sales orders are sent to Megaventory from Magento. When this option is checked, the Magento Sales Orders are sent to Megaventory and Megaventory will send back to Magento the inventory quantities. **The Order Synchronization option should be enabled immediately after the quantities of Magento and Megaventory are synchronized.** If the Magento front-end was previously temporarily disabled it can now be re-enabled.

This is the last step of the whole set-up process. See below for information regarding the extra features that the Magento extension has to offer.

Case 2 - I am already using Megaventory and want to start using Magento

Preliminary Step – Necessary settings in Magento

The following Magento settings need to be correctly set for the correct interoperability between Megaventory and Magento:

Cron Job (Unix)

Cron jobs, or scheduled tasks, must be enabled in order for the Megaventory extension to operate properly. By default if the Magento installation is running on a UNIX OS the OS should automatically recognize Magento's requests to use the CRON TAB service. The crontab service command can be used if shell access is granted to the server or added through cPanel or a similar admin tool. The crontab should have rows that look similar to one of these:

```
*       *       *       *       *       /bin/sh /[mage_dir]/cron.sh
*       *       *       *       *       /bin/bash /[mage_dir]/cron.sh
*       *       *       *       *       php -f /[mage_dir]/cron.php
*       *       *       *       *       /usr/bin/php /[mage_dir]/cron.php
*       *       *       *       *       /usr/local/bin/php -f /[mage_dir]/cron.php
```

Inventory Settings (Magento)

The Inventory Settings in the Magento software can be found by navigating to System > Configuration > [Catalog > Inventory (left menu)]. The **Decrease Stock When product in Placed** option (Option 1 in the figure below) will control whether non-shipped items in Sales Orders (a Pending Sales Order in Magento is equivalent to a Verified Sales Order in Megaventory) will be accounted for in the Global Stock. If this option is set to Yes, the Global Stock will decrease immediately when a Sales Order is placed. If this option is set

to **No**, Global Stock decreases only when items are shipped against the Sales Order. The Manage Stock option (Option 12 in the figure below) should be set to **Yes**.

Step 1 - Installation of the Megaventory extension in Magento

You need to Start the Component Manager in your Magento store first. To do this follow these simple, official [instructions](#) by Magento.

You then need to 'purchase' the free Megaventory Magento extension from the Magento Marketplace. To do that visit the [Megaventory Magento extension page in the Magento Marketplace](#) and click at Add to Cart. Follow the steps for the checkout process (you may need to create an account in the Magento Marketplace and login if you haven't already).

When you have completed the checkout, go back to your Magento site and install the Megaventory Magento extension by following these simple, official Magento [instructions](#).

Step 2 - Exporting the Megaventory Data to be used in Magento

The Megaventory data entities that need to be exported to Magento are the Products, Product Categories and the Clients. The Inventory Locations, the Currencies, the Taxes and the product quantities per Inventory Location will be synchronized later in Step 7.

The data export functionality of Megaventory allows for easy export of any data entity. For example, for Products, the user should navigate to the Products list and then click the Export as Excel option without selecting any product of the list. That action exports all the products in Excel format.

The same process should also be repeated for **Clients**. After the two xls files have been generated and saved in a local folder, the process of importing the entities to Magento can begin.

Step 3 - Importing the Megaventory Data to Magento

The steps in the Import Process of Magento can be summarized in the following steps:

- Login to the admin panel and navigate to system->import/export->profiles
- Click Import all Products (or Clients)
- Choose upload file and select the CSV file. Then click continue and edit

- Fill in the file according to the format specified by Magento. An example can be found here: http://docs.magento.com/m1/ce/user_guide/store-operations/data-csv-files.html
- Click "Run Profile" and select the file to import
- Click "Run Profile" in the Popup window

The above steps will import the Product and Client entities to the Magento system. For more detailed instructions, readers are encouraged to read the following Magento guide: http://www.magentocommerce.com/knowledge-base/entry/tutorial-using-magentos-import-export-profiles

Step 4 - Activating the Magento Integration in Megaventory

To use the Magento eCommerce software, the appropriate flag has to be set in the Account Integrations module of Megaventory. This module lies under the Admin menu tab of Megaventory and handles the few settings involved in integrating Megaventory to any 3rd party software. Extra help while filling out the form can be obtained by hovering with the mouse over the bubble icon next to each specific field.

When ready, the user should save the form by clicking the **Save** button. At this point, it is naturally assumed that the Ordering module of Megaventory is enabled. The **Enable Works (Manufacturing)** option should be checked if at least one product of type **Bundle** (similar to a **Finished Good** product type of Megaventory) exists in the Magento store. Both options can be set and unset from the **Admin** > **Account Setup** module of Megaventory.

Step 5 - Generating an API key

The user should navigate under **Profile Icon > Account and Billing > Admin > Users**.
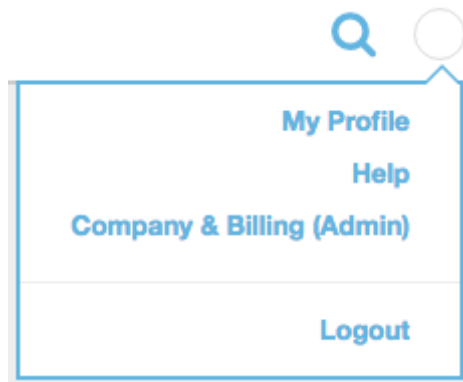
Clicking on the username of a user will bring up the definition of that user as seen in the figure below.

The choice of the Megaventory user that will be used to provide access to Magento to update Megaventory data is important. The user permissions of this specific user will be apply. Clicking on the **key** icon will generate a new random key for the specified user entity. Keep a record of that key; it will be used in Step 7 later on. Then, the **Update** button should be clicked to save/update the user entity.

The API key grants access to Magento so as to update the data of the Megaventory account. Therefore, the API key should be treated as a password.

Step 6 - Synchronizing Megaventory to Magento

The user shall navigate to the Megaventory menu tab in the Magento system. The page displays the connectivity settings that should be set by the user and also starts the synchronization process with the newly created Megaventory account, as shown in the figure below.

Connectivity Tab

If the Enabled setting is set to Yes, then the Magento installation will send and receive data with every Magento action that needs to communicate data to Megaventory. Setting the Enabled to No will effectively disable all the functionalities of the module.

The **API URL** should be set at:

```
https://api.megaventory.com/v2017a/json/reply/
```

 and finally, the **API Key** is the key generated at step 6 above.

When the user clicks the **Update** button, a success notification icon appears when all settings have been correctly set and connection between the two systems has been established. When a proper connection between the two systems cannot be established, a warning icon appears. Placing the mouse pointer over the warning icon will reveal the source of the errors which the user has to correct before continuing with the **Initialize Data** process.

The **Order Synchronization** is initially disabled and will be automatically enabled when the Setup Wizard ends successfully. While this option is unchecked, no sales orders are sent to Megaventory from Magento. This option should be enabled only when the inventory

quantities of Magento and Megaventory are synchronized (after the Setup Wizard ends successfully).

Setup Wizard

Next, the user shall start the process for synchronizing the Entities (Products, Product Categories, Inventory Locations and Taxes). Based on the number of entities that need to be sent to Megaventory, this process may take a significant amount of time.

Inventory Locations

Once the **Setup Wizard** finishes the user shall not select to send the Magento inventory to Megaventory. Then, a default Inventory Location (if more than one Inventory Location is present in Megaventory) must be chosen as shown in the figure above. The default Inventory Location is the one that all the Magento orders will be sent to by default. Moreover, by checking/unchecking the **Visible - Counts in Global Stock** option, the user may control (include/exclude) the Megaventory Inventory Locations that will contribute to the quantity displayed in the Magento front-end (**Global Stock**).

This is the last step of the whole set-up process.

Operation specifics

Overview

The Magento extension keeps entities (products, clients, orders, etc.) synchronized between Megaventory and Magento. For a flawless integration, the following guidelines should be understood and followed:

- Magento Products **should always be entered in the Magento system**. Products that are created in Megaventory will not appear in the Magento software and in the Magento front-end & backend.
- [Applicable for Magento Bundle Products only]: Products that are created in Magento as Bundle Products will be automatically created in Megaventory at the time when a Sales Order is placed in Magento. **The Works module should be enabled in Megaventory if at least one bundle product is added in Magento**.
  - The configuration of the Bundle Product at the time of the Sales Order will create accordingly the Bill of Materials of the product in Megaventory.
  - The Bundle Product will also be created as a Simple Product in Magento and will be automatically assigned a custom SKU. This is because the Bundle Product can hold inventory information in Megaventory.
- Magento Product Categories **should always be entered in the Magento system**. Product Categories that are created in Megaventory will not appear in the Magento system and in the shopping cart front-end.
- Magento Clients **should always be entered in the Magento system**. Clients that are created in Megaventory will not appear in the Magento system and in the shopping cart back-end.
- If suppliers exist in the Magento installation (either in the form of product attribute or by a Magento add-on that supports suppliers), these have to be **manually created in the Megaventory software**. Suppliers may be created one by one or imported to Megaventory by using Megaventory's import module.

- Inventory Locations should **always be created in the Megaventory software**. Magento has no provision for creating multiple Inventory Locations. If an Inventory Location is added in Megaventory, the **Update Inventory Locations Data** option will fetch the Inventory Location attributes. The **Import Inventory from Megaventory** option will fetch inventory quantity information from Megaventory. Both these options lie under the Megaventory > Settings screen.
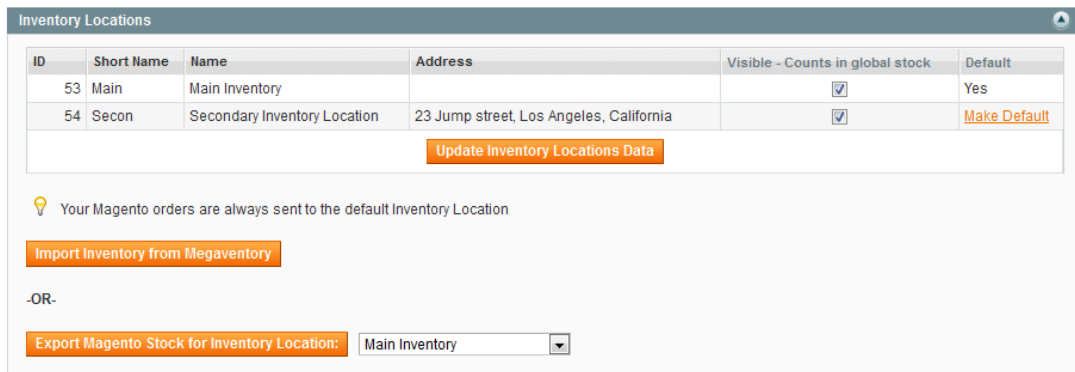
- Taxes can be **either created in the Megaventory software or in the Magento software**. If a tax is added in Megaventory, **the Synchronize Taxes** option should be clicked in the Magento software. This option lies under the Megaventory > Settings screen. If a tax is added to the Magento software it will be automatically added to the Megaventory software.
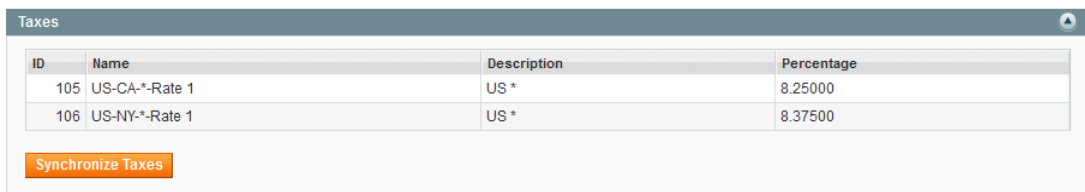
- **Magento Orders (Orders that are placed by clients in the frontend of Magento) will be automatically created in Megaventory and be assigned a Reference Number in the Megaventory software.** The Reference Number helps tracking the Magento orders in the Megaventory software.
  - o It is suggested that the **Numbering Scheme** of the Sales Order document in Megaventory is set to automatic numbering. By doing so, all the Sales Orders coming from Magento will receive an **Order Reference Number** (the sales order number of Magento) and the sales order numbering scheme of

Megaventory will be independent from the sales order numbering scheme of Magento. This also makes Megaventory ready to accept Sales Orders from other sales channels as well (other e-commerce software, manual sales orders through phone, etc.). If the **Numbering Scheme** of the Sales Order document of Megaventory is set to manual numbering, the Magento Sales Order number will be used also in Megaventory.

- o **Once a Sales Order is sent to Megaventory from the Magento frontend, the Sales Order has to be fulfilled (shipped/invoiced/closed) from Megaventory only.** Sales Order statuses and inventory quantities will be automatically sent back to the Magento software.

- **Sales Order cancellations have to be initiated from the Magento back-end. These actions will be then replicated to Megaventory. As such, if a Sales Order is cancelled in Magento, it will also be cancelled in Megaventory.**

Catalog > Manage Products

Under this screen that lists all Products, the inventory information is added per Inventory Location per Product.

Catalog > Manage Products > Product Information > General

Under this screen, the user may see all the *Transactions*, *Purchase Orders*, *Sales Orders* and *Sales Quotes* or *Set –Alert Levels* for the product in Megaventory.

Catalog > Manage Products > Product Information > General

Under this screen, the user may see all the quantity metrics of the product.

Choose Store View:
Default Values

Product Information

General
Prices
Meta Information
Images
Description
Design
Recurring Profile
Gift Options
Inventory
Websites
Categories
Related Products
Up-sells
Up-sells
Cross-sells
Product Reviews
Product Tags
Customers Tagged Product
Custom Options

Logitech diNovo Edge Keyboard (Default)

Back | Reset | Delete | Duplicate | Save | Save and Continue Edit

Inventory

Manage Stock	Yes	[GLOBAL]
	☑ Use Config Settings	
Qty*	209	[GLOBAL]
Qty for Item's Status to Become Out of Stock	0	[GLOBAL]
	☑ Use Config Settings	
Minimum Qty Allowed in Shopping Cart	0	[GLOBAL]
	☑ Use Config Settings	
Maximum Qty Allowed in Shopping Cart	10000	[GLOBAL]
	☑ Use Config Settings	
Qty Uses Decimals	No	[GLOBAL]
Backorders	No Backorders	[GLOBAL]
	☑ Use Config Settings	
Notify for Quantity Below	1	[GLOBAL]
	☑ Use Config Settings	
Enable Qty Increments	No	[GLOBAL]
	☑ Use Config Settings	
Stock Availability	In Stock	[GLOBAL]

Megaventory Stock Values

	Quantity	Non-Shipped quantity in Sales Orders	Non-Allocated quantity in Work Orders	Non-Received quantity in Purchase Orders	Non-Received quantity in Work Orders	Alert quantity
Main Inventory	209	0	0	0	0	0

For support and feedback, contact

support@megaventory.com