

UNLEASHED

Magento Integration Guide

Everything you need to know to integrate Unleashed inventory management with Magento eCommerce

Direct integration between two powerhouses of online sales and inventory management.

Gareth Berry
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Introduction

Welcome to Unleashed, the powerful inventory management solution that streamlines sales, purchasing and inventory control.

The combination of Unleashed and Magento provides a powerful ERP sales and stock management solution. It is easy to set up and run and will streamline your business processes from end to end. This level of integration will help reduce cost, remove data entry errors, update your shop with accurate quantities and costs in real time and give you accurate margin and sales reporting.

The emergence of cloud computing gives instant access to enterprise grade solutions to SME's who otherwise couldn't invest in the applications or infrastructure to run them on. Magento provides businesses with an easily configurable system "out of the box" and give businesses an online presence and shop front with which to promote their products and services to the world.

Unleashed provides businesses the necessary inventory control, purchasing, manufacturing and stock management functions to tie online sales and promotion with generally accepted accounting principles and supply chain management. If you are a business selling your goods online, then having these two solutions working for you will give your business an 'out of the box' integrated ERP supply chain and online sales suite of tools to super charge your business.

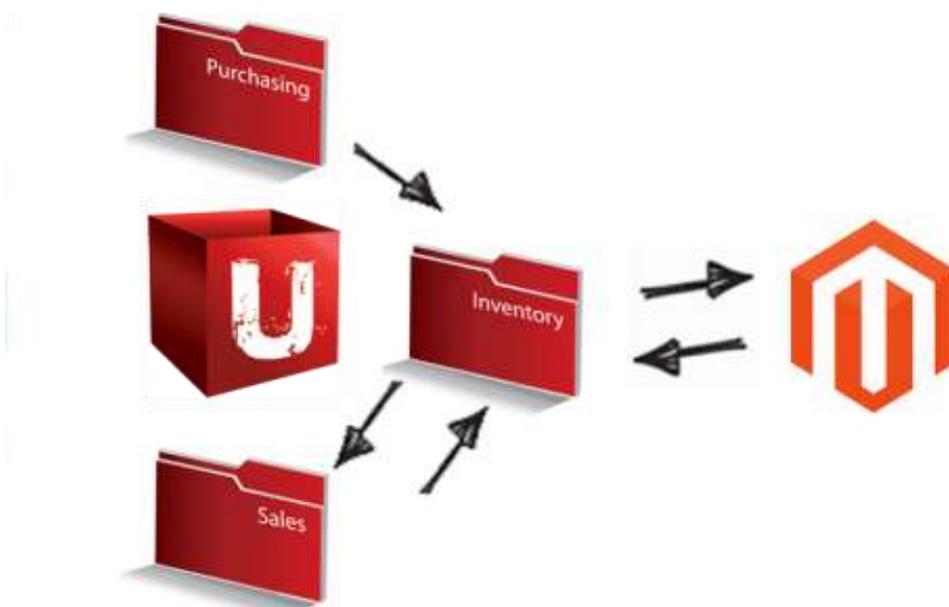
I would like to take this opportunity to welcome you to our success story, I hope you enjoy using our software as much as we enjoyed bringing this version to you.

Disclaimer

Magento can be installed and configured in many different ways and can have many different 3rd party plugins installed. It is not possible for Unleashed to test every single combination of every factor that can affect your Magento store.

Accordingly we can not make any guarantee that Unleashed will be able to connect to your Magento store. We recommend using a test copy of your Magento store and a demo of Unleashed to test if integration is possible.

The integration flow



Information is shared between the two systems by using the Magento API. The actual configuration of the integration is covered in a later chapter.

The information that can be shared between the two systems is:

Masterfiles

- Products
- Default sell price
- Average cost
- Customers (guests & accounts)
- Customer categories
- Stock on hand

Transactions

- Sales transactions
- Stock on hand changes

What products are supported?

Magento allows you to have simple and complex products. The simple products are a one to one relationship with the Unleashed products. The complex products require a little more understanding as to how they are integrated with Unleashed. All product types are supported however, so you can rest assured that if they are set up properly they will integrate with Unleashed and give you accurate sales and margin reporting.

Supported Magento product types:

- Simple products
- Complex products
 - Configurable products
 - Bundle products

Simple products

Simple products have a 1 to 1 relationship. They are simply a single product with a sell price and a cost. As is standard in all Magento versions, each product can have lots of options and be sold in many different currencies which is all supported in Unleashed. Therefore, they don't really need any further explanation here.

Configurable products

Magento allows you to have products with different options. For instance, different colours, styles, sizes , flavours etc...

Example would be:

MASTER1

MASTER1_CHILD1

MASTER1_CHILD2

A real life example of this could be flavours:

PROTEINBAR

PROTEINBAR_STRAWBERRY

PROTEINBAR_CHOCOLATE

Bundle products (available from 1st November)

This is where 2x or more simple products are bundled together to create a new product and sold as a bundle. Generally the bundle will be sold for a discounted rate from purchasing each of the components separately. i.e. combo deal.

Example would be:

MASTER1

MASTER1_CHILD1

MASTER2_CHILD1

A real life example of this could be a combo of Chocolate PROTEIN BARS and PROTEINSHAKES:

PROTEINBUNDLE_CHOCOLATE

PROTEINBAR_CHOCOLATE

PROTEINSHAKE_CHOCOLATE

To handle this in Unleashed, there is an auto-build feature, otherwise known as 'Kitting' or 'Kitsets'.

When you sell the bundle, Unleashed will remove each of the components out of stock and add them to the finished product with the single sell price.

In the above example, that would mean you would sell a PROTEINBUNDLE_CHOCOLATE that will automatically reduce the stock levels of the respective PROTEINBAR and the PROTEINSHAKE.

Getting started

What you'll need.

1. Administrator access to the Magento admin panel
2. Super User access to Unleashed

Create Magento API

The first thing to do is to create a role, a user, and an API key from your Magento Store Admin Panel. To do this log into the backend of our webstore.



Now create a new role in our Magento store. To do this click **System | Web Services | Roles**



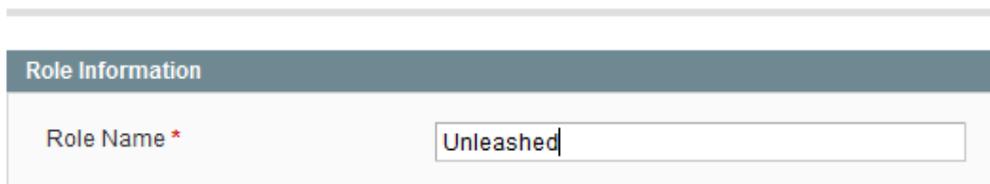
In Roles you will see the below screen.



You will have to give this new Role a name. This is simply used to help you identify it, and keep your account organized. We recommend a title such as Unleashed, to show the reason for this role.

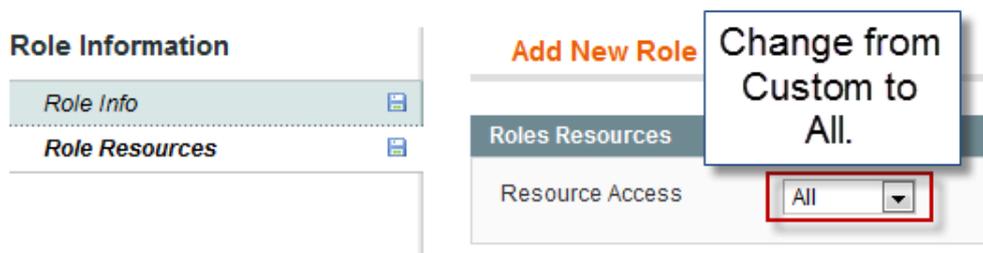
Note: we have found in some community versions that you cannot have any more than 5 separate roles listed. If you have more than 5 you will need to delete some roles, or re-use an existing role that fulfils the API integration requirements.

Add New Role

A screenshot of a web form titled 'Add New Role'. The form has a section header 'Role Information' in a dark blue bar. Below this, there is a form field labeled 'Role Name *' with the text 'Unleashed' entered. The form is styled with a light blue background and a dark blue header bar.

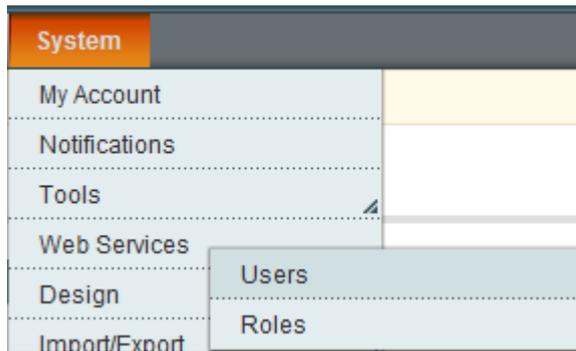
Once you have named your role go ahead and hit 'Save Role'. This will use one of the roles your account is allocated. In the community version of Magento you are allowed five roles before you have to upgrade your account.

Next, you must ensure this role has sufficient access to our account for Unleashed integration. To do this click on Role Resources and change Resource Access to **All**.



You will now create a new User to assign to this Role.

You can access your Users from System | Web Resources | Users.



Please click into Users, and you will see the below screen.

A screenshot of the 'New User' form. The form has a title 'New User' and buttons for 'Back', 'Reset', and 'Save User'. The form is divided into 'Account Information' and 'This account is' sections. The 'Account Information' section includes fields for User Name, First Name, Last Name, Email, API Key, and API Key Confirmation. The 'This account is' section has a dropdown menu set to 'Active'. Annotations with arrows point to the 'Save User' button and the 'Active' dropdown. A text box says 'Click here when finished.' pointing to the 'Save User' button. Other annotations explain the purpose of the User Name, Email, and API Key fields.

Please click on Save User when the new user information has been populated. This will save the new user, and you can assign this User to our created Role.

To do this we click on 'User Role' on the left hand side of the User screen. You then tick the box next to the Role we've created, to assign this User to the Role.

A screenshot of the 'Edit User' screen. The title is 'Edit User 'Mark''. On the left, there is a 'User Information' sidebar with 'User Info' and 'User Role' sections. The main content area shows a table for role assignment. The table has columns 'Assigned' and 'Role Name'. The 'Assigned' column has a dropdown menu set to 'Any'. The 'Role Name' column has a radio button selected next to 'Unleashed'. Above the table, there is a pagination and view control: 'Page 1 of 1 pages | View 20 per page | Total 1 records found'.

Once this is done we will click 'Save User' in the top right hand corner.

 The user has been saved.

Edit User 'Mark'

Account Information	
User Name *	<input type="text" value="Mark"/>
First Name *	<input type="text" value="Mark"/>
Last Name *	<input type="text" value="Spencer"/>
Email *	<input type="text" value="integrations@unleashedsoftware.com"/>
New API Key	<input type="password" value="....."/>
API Key Confirmation	<input type="password" value="....."/>
This account is	<input type="text" value="Active"/> ▼

This completes the configuration necessary in your Magento account, now you can configure Unleashed with this information.

Unleashed configuration

Go to Settings | Interfaces | Ecommerce Configurations

Select the version of your Magento

Note: For Magento GO you can use the 1.5.1.0 and above version of the API.

Select ECommerce Integration

<p>Magento 1.3 or 1.4</p> 	<p>Magento 1.5 or 1.6</p> 
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Once you select your Magento version, you will need to accept the disclaimer:

 **Magento Integration Disclaimer**

Magento can be installed and configured in many different ways and can have many different 3rd party plugins installed. It is not possible for Unleashed to test every single combination of every factor that can affect your Magento store. Accordingly we can not make any guarantee that Unleashed will be able to connect to your Magento store. We recommend using a test copy of your Magento store and a demo of Unleashed to test if integration is possible.

I have read and agree to the disclaimer.

The reason for the disclaimer is that although we have continually updated and improved the integration to cover almost all the situations we can think of, it is possible that you may have some extension installed, or unnatural requirement that means integration is impossible. It is also warning you that we do make updates to your store, so the usual analogy of 'garbage in' 'garbage out' applies.

Unleashed setup wizard

The Unleashed setup wizard takes you through the step by step process for integration. The wizard shows the first time you select your system you wish to integrate.

Start the Magento wizard



Here, you need to acknowledge that you have read and understand the disclaimer. To do this, simply check the box in the disclaimer

Enter Magento store details

Enter Magento Store Details ◀ Previous Step

Magento Store Details

Module	<input type="text" value="Magento 1.5.1.0"/>
Api User	<input type="text" value="my api user name"/>
Api Key	<input type="text" value="....."/>
Store Url	<input type="text" value="mymagentostore.com"/>

Entering your store details:
"Magento" for 1.3 and 1.4 stores.
"Magento 1.5.1" for 1.5, and 1.6 stores.
Create an API user
Create an API key
Enter the store URL not the store admin URL.

Module Select “Magento” for versions 1.3x and 1.4x. For all other versions including Magento GO platform, please select Magento 1.5.1.0

Api User Here you need to enter the API user name that you set up in your Magento store

Api Key Here you need to enter the API key that you entered into your Magento shop

Store Url This is the URL to the front page of your Magento shop. (not the backend). Here you will need to pay special attention to whether or not you have SSL set up for your shop or not. If you have, then you will need to enter https:// in front of your domain name.

Also, if you have redirects set up in your Magento shop (301 or otherwise) then we cannot guarantee you will be able to connect using the API. If you are having trouble connecting, this is the first place we suggest you look and removing all your redirects and trying again.

Test connection Press this button to test your settings. If successful, you will get a success message.

If your credentials are invalid, or Unleashed is not able to connect to your store, you will get an error message.



When your credentials and store setup are valid, you will receive a success message. Now you can move on to the next step of the setup.



Configure Magento options



Configure Magento Options

[Previous Step](#)

The integration with Magento is highly configurable. In this section you will select how much or how little information you would like to share across the two systems.

 **Magento Configuration**

Customer Reference

Guest Customer

Tax

Integrate Customer Categories

Integrate Product Price

Integrate Product Cost

Export SOH Quantity

Base Currency

Add Currency

Store Currencies

Customer reference

The three options are:

- Sales Order Number
- Purchase Order Number
- Sales & Purchase Order Number

Magento allows you to do 'part shipments' which means that your order number and invoice number may have a different number or sequence. If you would like to have the sales order number show in Unleashed invoices in the 'Customer Reference' field, then select **Sales Order Number** here. If you allow customers to put in a purchase order number you will want to use option b. Or if you would like to show both sales order number and purchase order number in the Customer reference field, then select option C. If you select this option there will be a pipe delimiter '|' that separates the two numbers.

Guest customer

In Unleashed you have two options:

- a. Use Guest Account
- b. Create Customer

Magento allows you to have guest customers turned on or off. In Unleashed you have the option of either creating a new customer account for each guest customer, or to have them all go to a single 'guest' account.

There are situations where you would want to 'create customer'. A practical example of this is if you were needing to link in Unleashed with a CRM system, then you would need to have all the details of your customers.

If you use Guest Accounts, and your Magento store is in multiple currencies, then you **MUST** set up all the currencies in the Unleashed settings. This set's up all of your guest accounts in the different currencies.

Tax

Your Magento store can be configured to allow for coupons / discounts. These discounts can be applied before or after tax as per your settings in Magento. Make sure your setting in Unleashed matches your Magento shop or your invoices will come across into Unleashed with the incorrect values.

Integrate customer categories

If you would like Unleashed to update the main category in Magento then turn this on.

Because Magento allows you to have nested categories, it is expected that most users will not have this option switched on.

Integrate product price

Magento has many pricing options. If you would like Unleashed to update the main price in your Magento store, then switch this option on.

An example of when you might like to integrate this is if you are doing a global price update / upload into Unleashed and you would like that update to also update the main sell price in your Magento store. You can switch this option on and off as you see fit.

Integrate product cost

Magento has one cost field. Unleashed values all products by the Average Landed Price costing methodology. As this price changes over time you can set Unleashed to update Magento's single cost field with the average landed cost. Changing the cost in Magento does not alter the average landed cost in any way whatsoever. Having this feature enabled would be a good idea if you have merchandising staff that you need to know cost details inside of Magento.

Export SOH quantity

This option should almost always be enabled. If you are unsure whether you should enable it then by default 'enable'.

This option updates all of the stock on hand quantity available inside of Magento. This is important if you have stock levels that you need to increase and decrease as sales are made. Every time stock quantity is updated in Unleashed it will also update your Magento store. The transactions inside Unleashed that affect stock are;

- a. Purchase Orders
- b. Sales Invoices (and parked invoices for 'reserving stock')
- c. Stock Adjustments
- d. Production / BOM's.
- e. and credits

If any of these transactions occur inside Unleashed, your Magento store stock will also be updated.

Add Currency

This option is used when you set your Magento store in multiple currencies and have guest accounts turned 'On'. If your store has this configuration then you will need to add each currency your store sells in so Unleashed can set up guest accounts for each of those currencies.

Import Magento products



What if my products are already in Unleashed?

If you have all products setup in Unleashed and no products in Magento you can skip this step and go to step 6: "Export to Magento".

What if my products are already in Magento?

If you have products in Magento that are not in Unleashed you must import all products from your Magento store to complete the integration.

Note: Products must be imported correctly. Unleashed can only use the data that you provide. If incorrect data is provided then future transactions may be incorrect and a substantial effort may be required to reconcile any errors. It is very important to get the correct Average Land Price before importing your products.

Key fields for product import

There are several important fields in the product CSV. Please take care to enter these items correctly:

- ProductCode - this must match the SKU in Magento. Product Description - this field is required and is your Magento product name
- AverageLandPrice - this must be the correct cost per unit. This should be calculated as (purchase price + additional costs eg freight) / (quantity). If this field is incorrect there is likely to be flow on effects. This field is required
- Is Api Product - this must be set to "Yes"
- Api Product Type - this must be set to the Magento product type of "**simple**" or "**configurable**" or "**bundle**".

Step 1. Download our product template file Products.csv

Start by downloading our product template file. This file already has the correct column headings Unleashed needs to import your product data.

Step 2. Copy your Magento products into the template.

Export your data from your Magento store. Using Excel or another spread sheet editor, copy and paste your data from the exported file into the Unleashed template. Make sure the data you copy matches the column headings in the template.

Step 3. Mark the products as belonging to your Magento store.

In the Products.csv locate the second to last column, "Is Api Product". Set the value of this column to "Yes" for every product in your product list.

Now locate the last column, "Api Product Type". Set the value of this column to match the product type from Magento. Supported product types are "simple", "configurable" and "bundle".

Step 4. Import the updated template file

Your product list can be uploaded on the Product Import page.

If there were any issues or exceptions with the upload they will be emailed to you. All products that can be successfully imported will be imported. You can make any amendments you need to the original CSV file and re-import that file. The only fields

that cannot be altered once imported are the mandatory fields such as Average landed Price.

Importing configurable products

The correct format for importing configurable products is:

MASTER PRODUCT

MASTER_CONFIG1

MASTER_CONFIG2

Example:

	A	B	AK	AL
1	*Product Code	*Product Description	Is Api Product	Api Product Type
2	EPS protein bar	EPS protein bar	Yes	configurable
3	EPS protein bar_Grape Bubblegum	EPS protein bar - Grape Bubblegum	Yes	simple
4	EPS protein bar_Lemon Lime	EPS protein bar-Lemon Lime	Yes	simple
5	EPS protein bar_Raspberry Lemonade	EPS protein bar-Raspberry Lemonade	Yes	simple
6	EPS protein bar_Tropical Fruit Punch	EPS protein bar-Tropical Punch	Yes	simple
7	EPS protein bar_White Blue Raspberry	EPS protein bar-White Blue Raspberry	Yes	simple

The important field to note on the import template is the Api Product Type. The first item / row needs to be the MASTER item and have a corresponding 'configurable' label in the column. The following items on the list need to be the options for that configurable product and have the Api Product type of 'simple'.

Import Magento stock on hand



If you have all products setup in Unleashed and no products in Magento you can skip this step and go to step 6: "Export to Magento".

If you have products in Magento that are not in Unleashed you must import all stock on hand quantities from your Magento store to complete the integration.

Step 1. Download our stock on hand template file SOH.csv

Start by downloading our stock on hand template file. This file has the correct column headings Unleashed needs to import your stock on hand data.

Step 2. Copy your stock on hand into the template

Export your data from your Magento store. Using Excel or another spread sheet editor, copy and paste your data from the exported file into the Unleashed template. Make sure the data you copy matches the column headings in the template.

In the SOH.csv locate the second column, "*Warehouse Code". Set the value of this column to the warehouse code of your default warehouse (usually this value is "W1").

Export Unleashed data to Magento



You can optionally export your Unleashed Products and Stock on Hand into Magento.

Use this when you have products that have been created in Unleashed that do not exist in Magento.

Click the Export Products button to send your Unleashed Products to Magento. Exported products will be created as **simple products in Magento**. It is not necessary to export products if they are not intended to be sold on your Magento store.

Click the Export SOH button to send your Unleashed Stock on Hand quantities to Magento too. This option is only for the initial upload, as you start making transactions in Unleashed and Magento this field will automatically sync.

Magento field mappings

The following table shows the fields mapped to Unleashed and Magento.

Product mappings

Unleashed Field	Magento Field
Product SKU	SKU
Product Description	Name
Average Land Price	Cost
Default Sell Price	Price
Product Group	Attribute Set (<i>where attribute set name = Product Group in Unleashed</i>)
SOH (stock on hand)	Qty

Invoicing mappings

Unleashed Field	Magento
Invoice Number	Invoice Number
Customer Reference	Order Number
Customer Reference	PO # - customer ref
Delivery Address	Delivery Address
Order Date	Invoice Date
Required Date	Invoice Date
Line Tax Rate	Item Tax Rate
Header Discount	Invoice Discount / Coupon

Line Discount	Item Discount / Coupon
Price	Item Price

Customer filed mappings

Unleashed Field	Magento
Customer Code	Code
Customer Name	Company Name if entered or First and last name
Currency <i>(these must be set up)</i>	Currency
Customer Types	Customer Category

Supported Magento versions

Unleashed supports all community versions from 1.3 onwards. We have a policy of updating and maintaining integration with all non-candidate release versions thereafter.

Unleashed also integrates with Magento GO. To integrate with Magento GO you must select the Magento 1.5.1.1 and above integration option

When there is enough demand for Unleashed on the Magento Enterprise platform we will extend support for this version also. If you use Enterprise please let us know.

Magento tax options in Unleashed

Shop tax settings

You can set your Magento shop as either

1. tax inc pricing
2. tax excl pricing

Unleashed will automatically work out your tax settings and accept your invoices with the correct pricing accordingly.

Tax rates

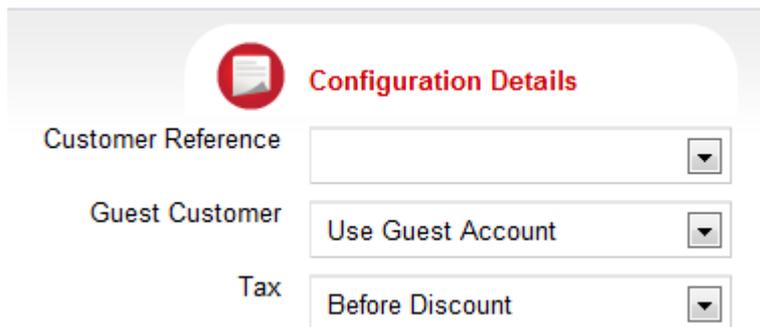
If you intend to use different tax rates in Magento other than your standard country tax or no tax then you will also need to set those tax rates up in Unleashed. If you are using Xero as your accounting system you will need to set all the different tax rates up there and import those into Unleashed.

To import the Xero tax rates go to: Settings | System | Taxes and import taxes.

Coupons and discounts

You can set your Magento shop to use discount coupons. These can be set either before or after tax. It is vitally important that you tell Unleashed which option you have set. Failure to do this will mean incorrectly priced invoices where coupons are used.

This setting is set from: Settings | Integrations | eCommerce Configuration



The screenshot shows a configuration panel titled "Configuration Details" with a red document icon. It contains three dropdown menus:

- Customer Reference**: A dropdown menu with a downward arrow.
- Guest Customer**: A dropdown menu with the selected option "Use Guest Account" and a downward arrow.
- Tax**: A dropdown menu with the selected option "Before Discount" and a downward arrow.

Using Configuration screen

Access to the eCommerce configuration screen is **Settings | Interfaces | Ecommerce Configuration**



The dashboard tells you everything you need to know about your Unleashed integration with Magento.

The Status, The last time Unleashed checked for an invoice from Magento, the last invoice that was transferred and the number of invoices transferred in the last import batch.

There are a number of buttons that will appear at the bottom depending on the stage of your integration too. These buttons server only as a guide to what you may need to do to integrate properly during the integration process and give you functional buttons once integrated.

The refresh button checks for new invoices and imports any new invoice found in your Magento.

The deactivate button temporarily deactivates your Magento connection without disconnecting completely. This is a great feature if you need to pause the integration for any reason.

Dashboard statuses

Not yet integrated

- You haven't entered your details.
- Enter Magento details and click save



Could not connect

- Url or user or key is incorrect or shop is not responding.
- Enter the correct details and click save



Products not imported

- Import products on the product import page or use the Unleashed extension to import products from your Magento store. Make sure you have "Yes" in the Column "Is API Product" on the product import template
- Or click the No products to import button



SOH not imported

- Import SOH on the SOH import page
- Or click the No SOH to import button



Manual transfer required

- Setup is all OK, but need to manually transfer once to make sure it works before automatic transfer can start
- Click the transfer button



Active

- All is OK
- Auto transfer is occurring every 5 mins, or is automatic (real time) if you install the Unleashed extension
- Auto transfer is occurring when pinged
- Click Deactivate button to stop auto transfer



Deactivated

- All is OK
- Auto transfer is not occurring
- Auto transfer is not occurring when pinged
- Click Activate button to start auto transfer



Using the Unleashed extension

The Unleashed extension is designed to simplify the setup and integration process by linking your Unleashed company ID with your Magento store. The setup of Unleashed integration with Magento requires you to import all of your Magento products too. This can be done by downloading all the csv export files and importing them into Unleashed. It is that simple!

Download the packaged extension

First step is to download the extension. You can download the extension here:

<http://unleashedsoftware.com/magento/sendinvoice.zip>

Install the extension

1. Upload the zip file to your root Magento directory using FTP or other file transfer protocols
2. Unpack the extension. This will load the extension into the relevant directories in your Magento folders
3. Log in to your Magento admin and refresh the cache located at **System | Cache Management**
4. Log out of your Magento completely and log back in again

Using the extension



Once the extension is installed a new menu item called Unleashed will be visible from the main menu and your settings menu.

Export Product_0.csv

The Export Product_.csv grabs every product in your Magento store and adds it to the CSV file format required to import into Unleashed.

Export SOH_0.csv

The Export SOH_0.csv grabs all of your stock quantities from your Magento store and adds them to the CSV file format required to import into Unleashed.

Export BOM_0.csv

The Export BOM_0.csv is used only if you have bundled products in Magento. Before you can use this file you will need to activate the Production module in Unleashed.

Setting up bundled products

Bundled products require the production module to be activated in Unleashed. Activate this module in the **Settings | Company** screen.

The most efficient method of setting up bundled products is to use the extension to export your bundles ready to import. You can set them up manually in Unleashed too.

Linking Magento with Unleashed

To link the two systems you will need to obtain your Unleashed Company ID. You can locate this at the bottom of the configuration screen located at **Settings | Integrations | Ecommerce Configuration**

Copy this code into the configuration setting in Magento and press save. As soon as you do this, an invoice you create in Unleashed will show up almost instantly in Unleashed as a parked order.

Magento GO configuration

It is Mandatory in Magento GO to have Product attribute sets. Once set, these cannot be altered. Therefore, if you are going live with Magento GO from Unleashed, or you are adding new products to your shop you will need to know how to add products with the attribute set correctly.

Let's assume you are adding a new product range and you need to know how to go about this:

1. You need to create the Product Group in Unleashed (if there is no product group already in the system for the new range)
2. You will need to create a product attribute set in Magento and give the name of the attribute set the exact name of the product group in Unleashed. (this must be exact or it will not work)
3. Import the product range into Unleashed from the CSV import template file making sure you set 'Is API Product' to 'Yes'
4. The products will now sync with your Magento shop and use the product group as the default product attribute set for the product in Magento GO.

Using Unleashed with Magento

Once you have configured your integration, it is now important to know how to use the two systems together. You will have your own requirements and needs, so the level and complexity is really up to you. Here are some important things you will need to know once you're up and running.

How do invoices come into Unleashed?

Invoices will flow through to Unleashed automatically. If you would like to 'push' the invoice through you can press the 'Transfer' button on the integrations screen to do this.

The only status of an order that comes into Unleashed is an "Invoiced" status. All other transaction types are ignored.

How to add new products to Unleashed and Magento?

Once you're integrated and running, new products will need to be imported using the CSV import template. By setting the 'is API product' to 'yes' you will enable the sync of the product to Magento. When you import it will also sync with Magento. You can also manually sync by pressing the export products button on the configurations screen.

If you add the products to Magento first, that is fine, you will just need to also import those products into Unleashed as well.

How do I make stock unavailable to my store?

If you have items in stock that you do not want to sell online then you simply need to transfer the items into a warehouse that IS NOT your default warehouse. Unleashed integrates only the stock that is in your default Unleashed warehouse with Magento. This means that by enabling the multi-warehouse features in Unleashed you can now separate your online and offline stock completely.

How do I sell items before I have them in stock?

If you sell items in Magento and then 'purchase to order' then you will need to enable negative stock in Unleashed. By enabling negative stock, the items will flow through to

Unleashed as you would normally expect, and give you the opportunity then to purchase these items from your suppliers and stock receipt them in prior to completing the transaction. By processing this way you will reserve your accounting stock and COGS records. Talk to Unleashed or your accountant further about this feature and all it's implications.

Can I batch complete orders in Unleashed?

Yes. In Unleashed there is a menu called 'Batch Complete' you can complete all or any of your transactions easily.

Can I import historical invoices into Unleashed for go live?

Sure. By default we integrate from the day your integration is set. This can be done at any-time. For instance, at go live you may want to import all invoices from the start of the month. Or sometimes during operation you make mistakes and need all invoices for a specified period to be re-imported. To re-import invoices simply email the Unleashed support desk with your request to support@unleashedsoftware.com to reset your product file ready for re-import.

How do I make global changes to my customers or products?

To make global changes to your products, customers or suppliers simply export all your masterfile records to CSV. Make the necessary changes and then import the updated file back into Unleashed. Any field which is not 'locked' (such as Code and Avg Landed Price) can be modified and updated.

What is the IP address Unleashed uses to transfer?

202.89.36.71

Accounting system integrations

Unleashed currently supports two scenarios which accounting integrating.

1. Integration with Xero (online accounting system)
2. Standalone system (for users of Quickbooks and other accounting applications)

Assistance on how to integrate Unleashed with Xero is available on the support help forum.

When you run Unleashed as standalone you have a report you can access to give you your Stock, Cost of Sales and Revenue amounts to journal in to your Profit and Loss.

These can be accessed from; Settings | Export | Account Enquiry



Opening SOI	Receipted Purchases	Completed Sales	Closing SOI	Change in SOI
2,754,218.37	0.00	0.00	2,754,218.37	0.00

Finding Help

There are many support avenues available to you. Primary assistance and help manuals can be accessed from our support forum at

<http://support.unleashedsoftware.com>

Email support is available on support@unleashedsoftware.com

Phone support / GOTO Meeting and Skype support can also be used as escalation utilities for troubleshooting and installation and training assistance

Auckland Office Phone:  64 9 447 1334 

Physical Address:

Unleashed Software

The Bob Tindall Building
Gate 5, Massey University
Oaklands Road, Albany 0632
Auckland, New Zealand

Postal Address:

Unleashed Software

Private Bag 102-904
North Shore Mail Centre
Auckland, 0745
New Zealand

Installation assistance and training

We recognise that getting set up properly with integration is primary to the project success. Therefore, we offer installation and training assistance to users wanting us to configure both the integration as well as set up Unleashed properly from the get go.

Unleashed offer a range of installation and support services to help you get up and running. As well as setting you up, we will provide you with an overview of the integration and training on how to use Unleashed. This is available for a one off cost of \$295 NZD.

[You can access our training and installation packages here](#)