

INFOplus Connect User Guide

Introduction

This document is intended for customers of Materialogic who wish to install the INFOplus Connect extension for Magento into their existing Magento installations. This document will provide the details and functionality as well as provide a guide for installation and troubleshooting of this extension.

Installation and Configuration

Magento Connect Marketplace

To install the INFOplus Connect extension into your existing Magento installation, first navigate to the Magento Connect Marketplace in a web browser. Search for “INFOplus” to find the INFOplus Connect extension, then click on the extension to view its details. Click the **Install Now** button for the latest version of the INFOplus extension. After you agree to the extension license, and click the **Get Extension Key** button, a text box will display a URL that you will need to copy and paste into your Magento instance. To do this, simply click the **Select Key** button to copy the URL into your system’s clipboard.

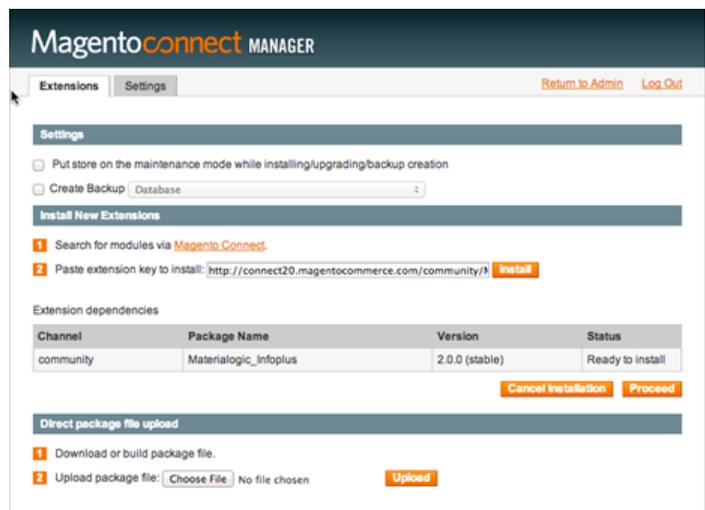
Magento Connect Manager

Now that you have the key for the INFOplus Connect, you must next open the Admin Panel of your Magento instance and use the Magento Connect Manager tool to complete the installation. To access this tool, log into your admin panel and click on **System > Magento Connect > Magento Connect Manager**.

Before attempting to install this extension to your system, please note that it is very important that the web server user have write access to the following directories of your installation:

- `app/etc/modules`
- `app/code/community`
- `app/design/adminhtml/default/default/layout`
- `app/design/adminhtml/default/default/template`

Once you have logged into the Magento Connect Manager, there will be a section labeled **Install New Extensions**, which will have a text box where the extension key can be pasted. Paste the key



The screenshot shows the Magento Connect Manager interface. At the top, there are tabs for 'Extensions' and 'Settings', along with 'Return to Admin' and 'Log Out' links. Below the tabs, there is a 'Settings' section with two checkboxes: 'Put store on the maintenance mode while installing/upgrading/backup creation' and 'Create Backup' (set to 'Database'). The 'Install New Extensions' section is highlighted and contains two numbered steps: 1. Search for modules via [Magento Connect](#). 2. Paste extension key to install: `http://connect20.magentocommerce.com/community/` with an 'Install' button. Below this is a table for 'Extension dependencies' with columns for Channel, Package Name, Version, and Status. The table shows one entry: Channel: community, Package Name: Materialogic_Infoplus, Version: 2.0.0 (stable), Status: Ready to install. There are 'Cancel Installation' and 'Proceed' buttons below the table. At the bottom, there is a 'Direct package file upload' section with two numbered steps: 1. Download or build package file. 2. Upload package file: with a 'Choose File' button and 'No file chosen' text, and an 'Upload' button.



and click the **Install** button, and the manager will allow you to confirm the installation. Click the *Proceed* button, and the Magento Connect Manager will automatically download and install the INFOplus Connect extension.

Once the download begins, a dialog is displayed showing the status as the contents of the extension file will be installed to the proper directories in your Magneto installation instance. As part of the automated installation process, the Magento cache will be automatically cleared by the installer.

After this has completed successfully, click the **Refresh** button and ensure that you are seeing the extension listed within the set of currently installed extensions. At this point, return to the Admin Panel, and log out and log back in to ensure you are using a new session.

Creating API Roles and Users

In order for Materialogic's INFOplus system to access data from your Magento instance, you will need to create a web service user which will be used by our systems to log in and use Magento's built in API. This is done by first creating a **Role** which will be given access to the API resources. This can be found in the admin panel under **System > Web Services > SOAP/XML-RPC – Roles**.

To create a new role, click on the **Add new Role** button. Enable all Web Service permissions for this role by clicking on **Role Resources** and selecting **All** from the dropdown. Set the **Role Name** under **Role Info** and store the newly created role.

Next create a web service user by navigating to **System > Web Services > SOAP/XML-RPC – Users** in the Magento Admin Panel. Fill in the required details for the user and select the role you have created for this user under the **User Role** section. The user name and API Key values will need to be provided to Materialogic, which will use these credentials to log into the Magento API services.

Extension Configuration

To configure the INFOplus Connect, log into the Admin Panel and Navigate to **System > Configuration**, and click on the **INFOplus Options** tab under the **Materialogic** header on the left side. From here, you can setup your extension by entering the **Deployment Identifier**, which is a unique key that will be provided to you by Materialogic, once your account is ready for testing. This configuration screen also allows changing the Test Mode of the extension. The Test Mode value should be set to **Yes** during the testing phase of the integration with Materialogic. Once ready for production, this value can be set to **No**, and integration will commence with Materialogic's production system.

Finally, an option to disable address validation is included. This action is typically not recommended, as INFOplus requires address validation on incoming order data.

Product Setup

Once the INFOplus Connect extension is installed and configured, when a Magento order is placed, Materialogic's INFOplus system will be notified of the new order. If applicable, the Magento order data will be pulled into the INFOplus Warehouse Management System (WMS) as a new order. To determine what line items to use for the new order, the INFOplus system will iterate over each of the products on that order, and if any of them have an INFOplus SKU value assigned to them, they will be added to the WMS requisition. Line items that do not have this value set will be ignored, and if no items on the order contain a SKU value, the order will not be pulled into INFOplus.

To set the SKU values for your products, log in to the Magento Admin panel and navigate to **Catalog > Manage Products** and find the product you wish to edit. Enter the SKU value here and click **Save** to associate that value with this Magento product. After the Sku value is entered, the system will uppercase all letters (required by INFOplus) and verify that it is not a SKU that is associated with a different Magento product. If the SKU value has already been assigned to an existing product, you will be alerted and forced to use a different SKU value.

Features

Core features provided by this extension include address validation during the checkout process, direct order

transfer to INFOplus upon order placement, real time updates visible via the admin panel as orders are updated in INFOplus, and an **INFOplus Order Information** tab, available when viewing a Magento order from the Admin Panel. When an order ships from Materialogic, an API call will be made to your Magento instance that will update the shipment information in Magento and trigger the Shipment Notification email to be sent.

Address Validation

For an order to be accepted into the INFOplus warehouse management system, valid address information must be provided with the order. By default, Magento does not provide address validation, so included in the INFOplus extension is address validation during the checkout process. This is provided via a real-time call to the Materialogic Address Validation Web Service to ensure the state and ZIP code values are valid. If an invalid address is provided, the user is shown an alert and is not allowed to proceed until the address is corrected.

INFOplus Order Integration

When the checkout process is complete, Materialogic's INFOplus system is notified of the purchase and communicates with your Magento instance via API calls to gather details to create a WMS requisition. Once the order is in the INFOplus WMS, real time updates are provided to your Magento system as the order is processed and shipped. These updates are added to the **Comments History** section on the **Order View** screen from within the Magento Admin Panel.

If any problem occurs during the order information gathering process, the purchase is allowed to complete within the Magento instance, while the message to INFOplus for this Magento order is placed in a suspension queue. This allows the problem to be rectified and the order information for this Magento order to be gathered at a later point in time.

INFOplus Order Visibility

Also within the **Order View** you will see a tab on the left hand side titled **INFOplus Order Information** where detailed information about the order within INFOplus can be viewed. Information in here includes warehouse details about your order, payment information, and audit messages as the order progresses through INFOplus. This tab will also display an indicator when the Materialogic INFOplus system is in **Test Mode**.

Inventory Management

Materialogic's INFOplus Connect extension will also update the quantity available of all Magento products that have a SKU value associated with them. Acting as the master for the quantity levels, as these values fluctuate in the INFOplus WMS system, INFOplus will compare the quantity available in the warehouse with those reflected in your Magento instance. If the quantity values do not match, the quantity available in Magento is updated to match the INFOplus WMS quantity. Optionally, items that reach zero quantity can be disabled so that they no longer appear on the site. Speak with your customer service representative during the setup process if you would like items removed from the site when they have zero quantity. Alternatively, backorders can be enabled when quantity is at or below zero. Disabling the managing of stock in Magento will allow backordering to INFOplus and preclude the "in stock" parameter from being changed when synchronizing Magento & INFOplus's inventory levels. To disable it:

1. Access the product in the Magento Control Panel and click "Inventory".
2. Set "Manage Stock" to "No".
3. Repeat steps 1 and 2 for all affected products.
4. Rebuild Magento's cache by going to System Cache Management.
5. Refresh all caches on the Cache Management screen.

Integration Process

Testing

To begin testing your installation, Materialogic will require the following pieces of data:

- Test Web Service User Name
- Test Web Service API Key
- Test Magento Instance API URL (including auth credentials, if applicable)



- Live Web Service User Name
- Live Web Service API Key
- Production Magento Instance API URL

Once these have been provided to Materialogic, you will be provided with a Deployment Identifier that can be entered on the INFOplus Options configuration screen. Next, each product that INFOplus will need to consider when creating requisitions from Magento orders will need their SKU values entered. The coordination and mapping of Products to SKU values will take place with your customer service representative.

Moving to Production

While testing the integration, your INFOplus Connect extension will be set to **Test Mode**, meaning communication between your Magento installation and INFOplus is done through Materialogic's testing backend. These test instances contain staging data that can be used during setup and testing, while not affecting any production data. To move into production, navigate to **System > Configuration**, select the **INFOplus Options** tab, and change the **Test Mode** value to **No**.

Once this change is complete, subsequent purchases will result in communication with Materialogic's production servers and API calls to Magento will now be directed at the production URL that was provided to Materialogic.

Requirements and Limitations

Unsupported Features

The following features are currently not supported by the Materialogic INFOplus extension and will result in unknown or unexpected behaviors:

- Checkout with multiple shipping addresses in the same order.
- Cancellation or Editing of an order. To avoid this, please reference the status updates, located in the **Comments History** section of the View order screen to ensure the order has not yet been processed or shipped by INFOplus.