



Bexio Connector for Magento 2

Product Specification

The Bexio connector is a two-way connector between Magento 2 and Bexio application. Its aims for seamless integration between both apps and keeping their customers, Products and order details synced. This connector is used for keeping the order, product and customer updates and details synced between Bexio and Magento. The customers and orders created in the Magento app get synced to Bexio through Webhook and APIs and vice-versa. For the app setup, the access token generation method is used which allows linking the apps. From Magento to Bexio the customers, products and orders details are synced, and from Bexio to Magento, the same get synced.

Installation Steps (if purchased via adobe marketplace, please install via composer)

To install the Bexio Extension for Magento 2, follow the steps below.

- 1) Download the extension.
- 2) Access your web server directories and unzip and upload the content of the zip file to app/code/Pits/Bexio directory.
- 3) Run the following commands from the SSH terminal of the server to complete the installation.
 1. Enable the module - `php bin/magento module:enable Pits_Bexio`
 2. Update the database schema - `php bin/magento setup:upgrade`
 3. Generate and pre-compile classes - `php bin/magento setup:di:compile`
 4. Deploy static files - `php bin/magento setup:static-content:deploy`
 5. Clear the cache - `php bin/magento cache:flush`

Features

- Order syncing from Magento to Bexio and vice versa.
- Products syncing from Magento to Bexio and vice versa including inventory.
- Contact/customer syncing from Magento to Bexio and vice versa.
- Invoice creation in Bexio when invoice created in Magento.
- Shipping creation in Bexio when shipment is created in Magento.



Admin Panel Configuration

Navigate to **Admin > Stores- >Configuration > Pits Extension > Bexio.**

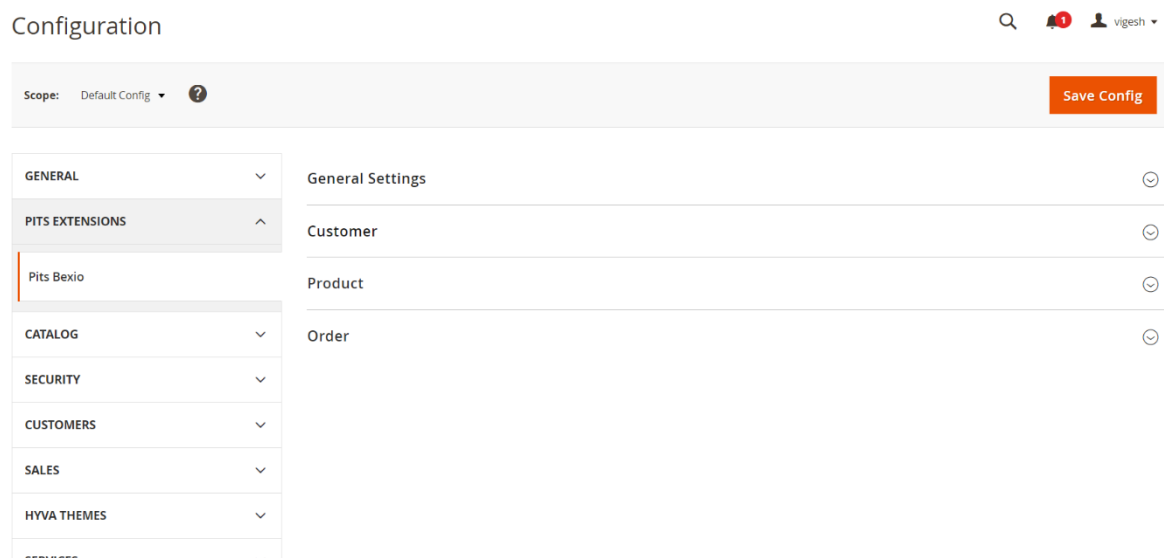


Figure 1 – Bexio Settings – Configuration

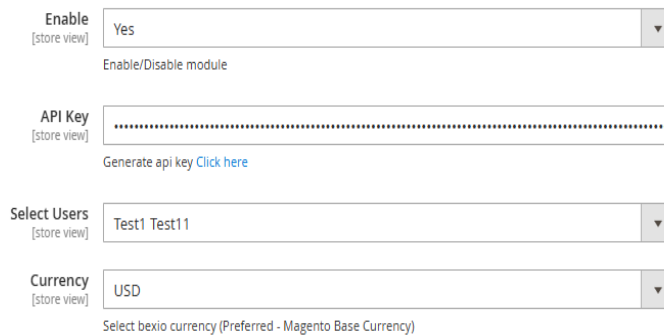
Figure 1 displays the admin configurations of the extension, these settings are categorized into four groups, each containing specific fields.

The **General Settings** encompass the following fields

- **Module Enable** – Enable / Disable module.
- **Api Key** – create API key from Bexio app.
- **Select Users** – Select the appropriate users in Bexio.
- **Currency** - Use the selected currency to sync products and orders in bexio, preferably, Magento Base Currency.



General Settings



The screenshot shows the 'General Settings' section of the Bexio configuration. It contains four settings, each with a '[store view]' link and a dropdown arrow:

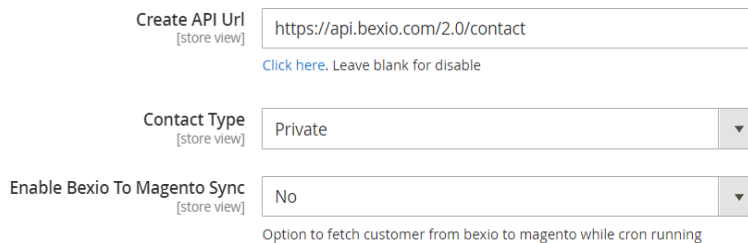
- Enable**: Set to 'Yes'. Below it is the text 'Enable/Disable module'.
- API Key**: A field containing a masked key (dots). Below it is the text 'Generate api key [Click here](#)'.
- Select Users**: Set to 'Test1 Test11'.
- Currency**: Set to 'USD'. Below it is the text 'Select bexio currency (Preferred - Magento Base Currency)'.

Figure 2 – Bexio Settings – General Settings

The **Customer Settings** encompass the following fields.

- **Create API URL** – This is the end point for customer API in Bexio, already populated by default. This can be changed if any changes in API end point.
- **Contact type** – Select type either Company or Private.
- **Enable Bexio to Magento Sync** – This setting will decide whether to Sync customer data from Bexio to Magento or not.

Customer



The screenshot shows the 'Customer' settings section of the Bexio configuration. It contains three settings, each with a '[store view]' link and a dropdown arrow:

- Create API Url**: Set to 'https://api.bexio.com/2.0/contact'. Below it is the text 'Click here. Leave blank for disable'.
- Contact Type**: Set to 'Private'.
- Enable Bexio To Magento Sync**: Set to 'No'. Below it is the text 'Option to fetch customer from bexio to magento while cron running'.

Figure 3 – Bexio Settings – Customer Settings.

The **Product Settings** encompass the following fields.

- **Create API URL** – This is the end point for product API in Bexio, already populated by default. This can be changed if any changes in API end point.
- **Select Users**: This setting is used to select the user from Bexio account.
- **Select Unit Id for Normal Product**: This setting is used to set the unit of measurement of normal products from Bexio.
- **Enable Bexio to Magento sync** – This setting will decide whether to Sync product data from Bexio to Magento or not.



- **Select Tax for Bexio Products** – Select tax rate for bexio products while syncing from Magento to Bexio.
- **Default Tax Class for Product** – Select the tax class for magento products which will take when syncing from Bexio to Magento.

Product



The screenshot shows the 'Product' settings page in Bexio. It contains several dropdown menus and a checkbox. The 'Create API Url' field is set to 'https://api.bexio.com/2.0/article'. The 'Select Users' dropdown is set to 'test test'. The 'Select Unit Id for Normal Product' dropdown is set to 'pc'. The 'Select Tax For Bexio Products' dropdown is set to 'UEX - Export/Exempt 0.00%'. The 'Default Tax Class for Product' dropdown is set to 'Taxable Goods'. The 'Enable Bexio To Magento Sync' dropdown is set to 'Yes'. A checkbox labeled 'Use system value' is present next to the 'Default Tax Class for Product' dropdown. Below the 'Enable Bexio To Magento Sync' dropdown, there is a note: 'Option to fetch products from bexio to magento while cron running'.

Create API Url <small>[store view]</small>	https://api.bexio.com/2.0/article <small>Click here. Leave blank for disable</small>
Select Users <small>[store view]</small>	test test
Select Unit Id for Normal Product <small>[store view]</small>	pc
Select Tax For Bexio Products <small>[store view]</small>	UEX - Export/Exempt 0.00%
Default Tax Class for Product <small>[store view]</small>	Taxable Goods <small>Select tax class for magento products</small>
Enable Bexio To Magento Sync <small>[store view]</small>	Yes <small>Option to fetch products from bexio to magento while cron running</small>

Figure 4 – Bexio Settings – Product Settings

The **Order** encompass the following fields

- **Create API URL** This is the end point for order API in Bexio, already populated by default. This can be changed if any changes in API end point.
- **Header** – Header message shown in Bexio order template.
- **Footer** – Footer message shown in Bexio order template.
- **Template** – The template which is used for order.
- **Select Tax**- Choose tax which merchant want to set for an order.
- **Enable Bexio to Magento sync** – This setting will decide whether to Sync order from Bexio to Magento or not.
- **Shipping Method** – Choose the shipping method to use for orders to sync from Bexio to Magento and it will be checking order shipping product in Bexio and based on that, will set shipping method in Magento. Please see constraints section to know more on this.
- **Payment Type**: Payment method to set when syncing from Magento to Bexio.
- **Bexio Email Subject**: Email subject of Bexio invoice email.
- **Bexio Email Content**: Bexio invoice email content.
- **Attach Pdf**: Option to attach PDF in Bexio invoice mail.



Order

Create API Url <small>[store view]</small>	<input type="text" value="https://api.bexio.com/2.0/kb_order"/> Click here. Leave blank for disable
Header <small>[store view]</small>	<div>Dear [Name] Thank you for your order. You will find your order confirmation below.</div>
Footer <small>[store view]</small>	<div>Do you have any questions? Get in touch with us. Kind regards [User]</div>
Template <small>[store view]</small>	<div>Standardvorlage</div>
Payment Type <small>[store view]</small>	<div>Vorauszahlung</div> <div>Select the payment type for Bexio order sync</div>
Bexio Email Subject <small>[store view]</small>	<div>Rechnung</div> <div>Enter email subject of bexio invoice</div>
Bexio Email Content <small>[store view]</small>	<div>Sehr geehrte Damen und Herren Wir danken für Ihren Auftrag und berechnen unsere Leistungen wie folgt: Unter folgendem Link können Sie die Rechnung ansehen und bezahlen:</div> <div>Enter email content of bexio invoice</div>
Attach Pdf <small>[store view]</small>	<div>No</div> <div>Attach Pdf in bexio invoice mail</div>
Enable Bexio To Magento Sync <small>[store view]</small>	<div>Yes</div> <div>Option to fetch orders from bexio to magento while cron running</div>
Shipping Method <small>[store view]</small>	<div>Fixed (flatrate_flatrate)</div> <div>Choose the shipment method for Bexio to Magento order sync</div>

Figure 5 – Bexio Settings – Order Settings.

Workflow

1) Customer Sync

Whenever a customer is created in Magento shop frontend, the customer details will get synced to Bexio.

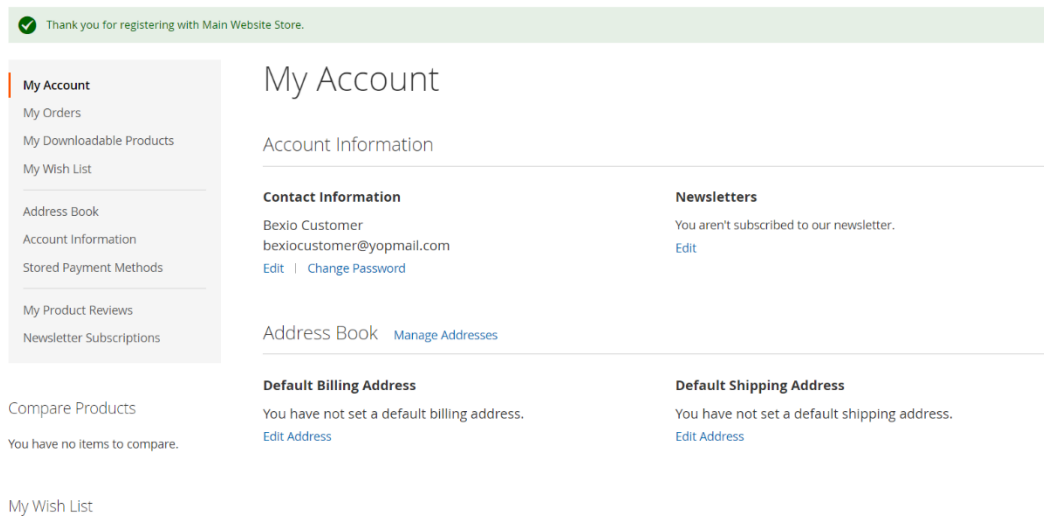


Fig 6- Customer creation in magento

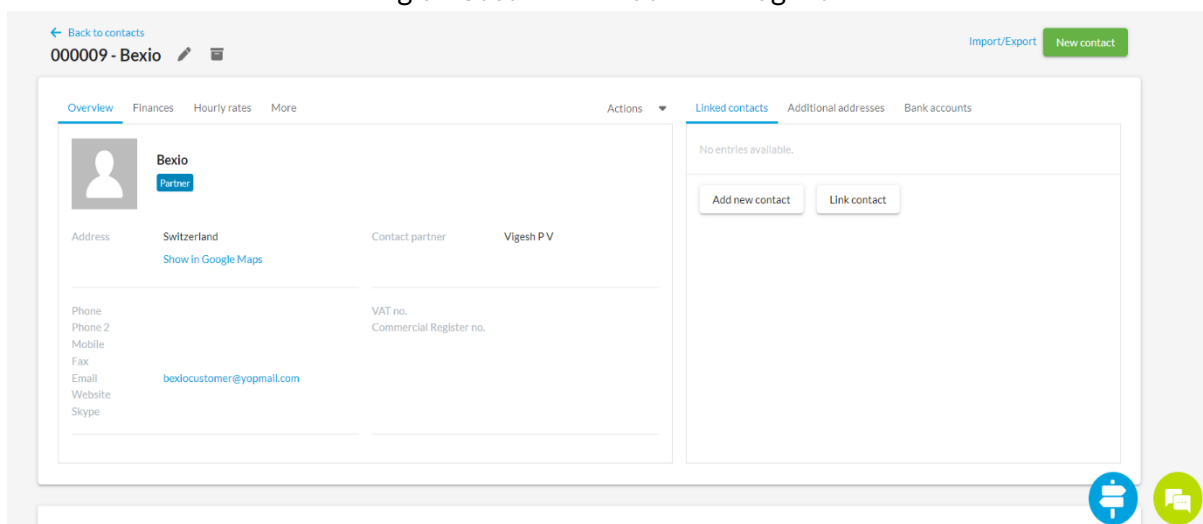


Fig 7 – Bexio customer

Customer address field will get updated in Bexio only while editing address in Magento.

2) Bexio to Magento Customer Sync

The Bexio contact will get synced on Magento store as customers on running the cron job. To add contacts login to Bexio dashboard and click on contacts in navigation.

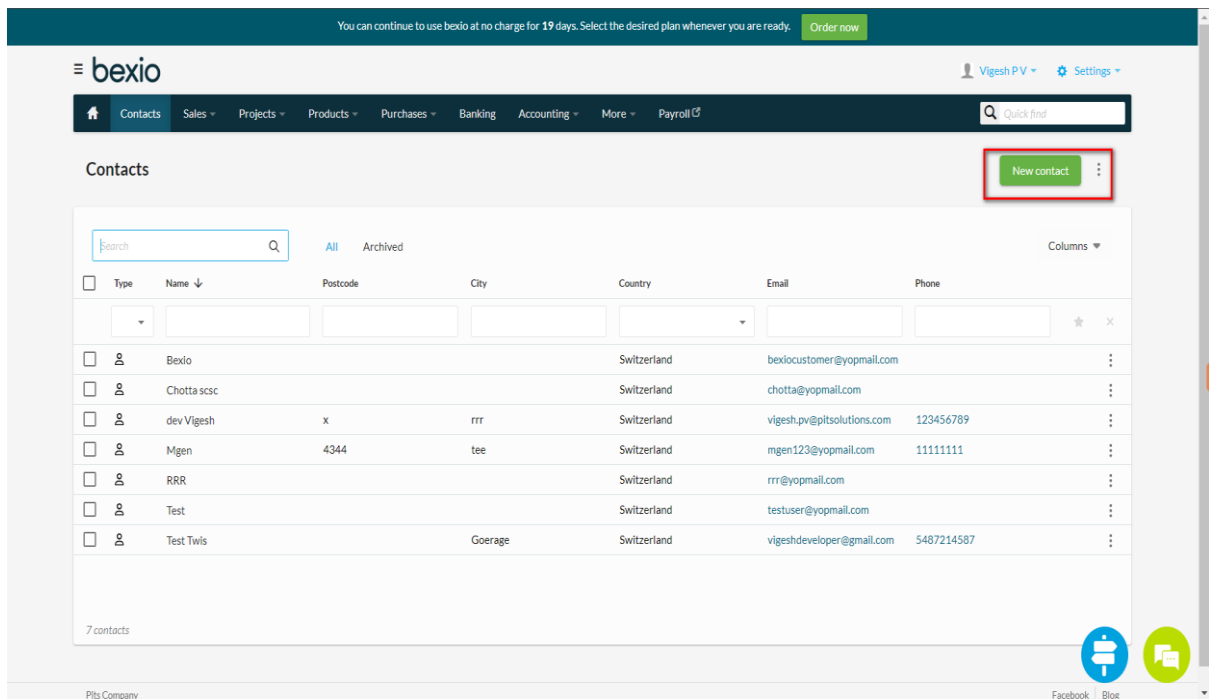


Fig 8 - Bexio customer create

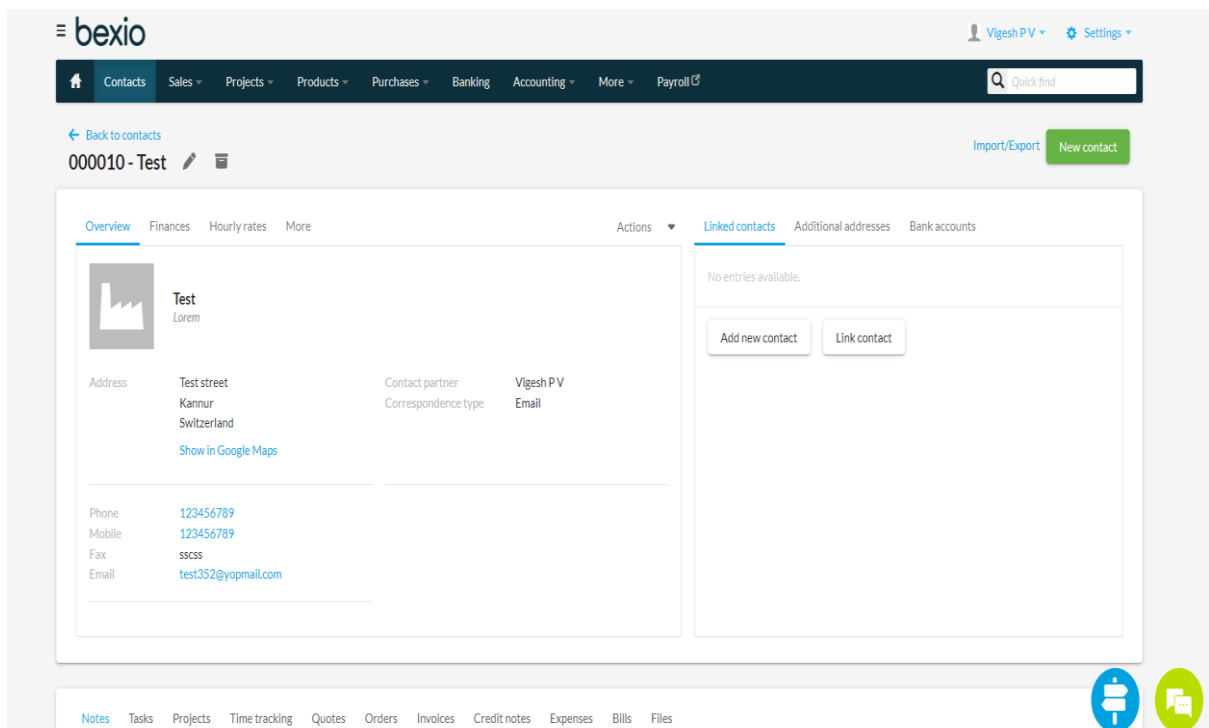


Fig 8.1 Bexio customer create



Customers

Add New Customer

Actions

10 records found

🔍

🔼

👁

⚙


👤

20

⏪

⏩

<div>▼</div>	ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax VAT Number	Gender	Act
<input type="checkbox"/>	79	Chotta scsc	chotta@yopmail.com	General					17 Apr 2024 03:50:23		Confirmation Not Required	Admin				Edit
<input type="checkbox"/>	84	www Devv	mgen123@yopmail.com	General	11111111	4344	United States	Georgia	18 Apr 2024 03:36:31	Main Website	Confirmation Not Required	Default Store View			Male	Edit
<input type="checkbox"/>	85	Test user	testuser@yopmail.com	General	1254875421	1234	Switzerland	Solothurn	21 Apr 2024 23:42:40	Main Website	Confirmation Not Required	Default Store View			Male	Edit
<input type="checkbox"/>	86	Bexio Customer	bexiocustomer@yopmail.com	General					22 Apr 2024 04:02:16	Main Website	Confirmation Not Required	Default Store View			Male	Edit

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Magento ver. 2.4.6-p4

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shFig 9 – Bexio customer Sync

Note: When deleting customers from Magento the Bexio customer will also get deleted by webhook.

3) Product sync

Add a product in Magento backend, and the product will be created in Bexio app with basic information required for Bexio product.

iPhone 14

Scope: All Store Views ?

← Back Add Attribute Save

✓ You saved the product.

Enable Product ☒ Yes

Attribute Set Default

Product Name * iPhone 14

SKU * iPhone12354

Price * \$ 40.00

Advanced Pricing

Tax Class Taxable Goods

Fig 10 – Product create



Product +
iphone12354 - Iphone 14 (100)

New product

Master data Tiered price

iphone12354 - Iphone 14 (100)

Contact partner: P V Vlgesh
Product type: Goods
Group:
Product code: iphone12354
Product name: Iphone 14
Product description:

Price information

⌕ Purchase price: 40.00+ surcharge in % 0.00
⌕ Selling price: 40.00 - Profit margin in % 0.00
Currency: CHF
Unit:
Sales tax for VAT:
Pre-tax for VAT:

Actions

Duplicate this product
 Add new product in a series
 Enter product in a set

Inventory management

Warehouse location:
Bin location:
Minimum inventory: 1
Inventory: 100

Fig 11 – Bexio Product

4) Product Deletion

When you delete the product from Magento backend the same product will also be deleted from Bexio.

5) Bexio to Magento Product Sync

The Bexio products will sync to Magento store based on scheduled cron job. To add products in Bexio, log in to Bexio dashboard and go to the products.

Note: The Bexio connector cron jobs will be executed only if Magento default cron is set up in the shop.

Note: The Magento product tax class will be taken from Bexio configuration.

Default Tax Class for Product [store view] Taxable Goods ☐ Use system value

Select tax class for magento products

Fig 12 – Tax Config for syncing from Bexio to Magento

You can continue to use bexio at no charge for 19 days. Select the desired plan whenever you are ready. [Order now](#)

bexio

Vlgesh P.V. Settings

Contacts Sales Projects Products Purchases Banking Accounting More Payroll

Quick find

Product

New product

All Custom filter

Filter Search

Name	Code	Currency	Purchase price	Selling price	
Cello Bottle	1cc556	CHF	40.00	40.00	<input type="checkbox"/>
Google Pixel 6a (Chalk, 128 GB) (6 GB RAM)	Google Pixel 6a (Chalk, 128 GB) (6 GB RAM)	CHF	14.00	35.00	<input type="checkbox"/>
Iphone 12	we33r3	CHF	150.00	150.00	<input type="checkbox"/>
Iphone 14	iphone12354	CHF	40.00	40.00	<input type="checkbox"/>
Nothing	Nothing	CHF	32.00	32.00	<input type="checkbox"/>
Realme 9 pro plus	4544rrfv	CHF	32.00	32.00	<input type="checkbox"/>
Redmi note 10 pro max	454204	CHF	333.00	333.00	<input type="checkbox"/>
Sponeta S 4-73 e / 4-70 e Outdoor Tischtennistisch	ssssvvvv	CHF	3,500.00	3,500.00	<input type="checkbox"/>
Voice to Text Chatter of Magento	1562266	CHF	14.00	35.00	<input type="checkbox"/>

Entries 1-9 of 9

Select an action

Pits Company Help & Support

Facebook Instagram

© bexio ag

Fig 13 – Bexio product grid



The screenshot shows the Bexio product management interface. At the top, there's a navigation bar with tabs like Contacts, Sales, Projects, Products (selected), Purchases, Banking, Accounting, More, and Payroll. Below this, the product name 'bexss - Bexio Test Product' is displayed. The main content area is divided into two sections: 'Master data' and 'Tiered price'. The 'Master data' section contains fields for Contact partner (P V Vigesh), Product type (Goods), Group, Product code (bexss), Product name (Bexio Test Product), and Product description (Lorem Ipsum text). The 'Tiered price' section shows Price information: Purchase price (25.00+ surcharge in % 20.00), Selling price (30.00 - Profit margin in % 16.67), Currency (USD), Unit (pc), Sales tax for VAT (UEX - Export/Exempt 0.00%), and Pre-tax for VAT (ZOLLN - Import Mat/SV 100.00%). On the right, there are action buttons: Duplicate this product, Add new product in a series, and Enter product in a set.

Fig 13.1 Bexio product management page.

Products

Add Product

Actions10 records found

20

<div></div>	ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Salable Quantity	Visibility	Status	Websites	Last Updated At	Action
<div></div>	8	<div></div>	Nothing	Simple Product	Default	Nothing	US\$32.00	1000.0000	Default Stock: 1000	Catalog, Search	Enabled	Main Website	11 Apr 2024 06:50:45	Edit
<div></div>	10	<div></div>	Iphone 12	Simple Product	Default	we33r3	US\$150.00	50.0000	Default Stock: 50	Catalog, Search	Enabled	Main Website	11 Apr 2024 07:51:35	Edit
<div></div>	11	<div></div>	Cello Bottle	Simple Product	Default	1ce556	US\$40.00	96.0000	Default Stock: 77	Catalog, Search	Enabled	Main Website	16 Apr 2024 07:11:01	Edit
<div></div>	12	<div></div>	Iphone 14	Simple Product	Default	iphone12354	US\$40.00	100.0000	Default Stock: 100	Catalog, Search	Enabled	Main Website	22 Apr 2024 03:06:22	Edit
<div></div>	13	<div></div>	Bexio Test Product	Simple Product	Default	bexss	US\$30.00	0.0000		Catalog, Search	Enabled	Main Website	22 Apr 2024 03:44:18	Edit

Fig 14 – Bexio product reverse sync

After creating product in Bexio, based on the scheduled cronjob, product will be synced to Magento.

6) Order Creation

Place an order from Magento store.



Search entire store here...



Mobiles

Thank you for your purchase!

[Print receipt](#)

Your order number is: **000000187**.

We'll email you an order confirmation with details and tracking info.

[Continue Shopping](#)

Fig 15 – Magento order

The Bexio interface displays the order management page for 'Order AU-00021 - Test'. The top navigation bar includes 'bexio' logo, user 'Vigesh P V', and 'Settings'. The main menu has options like 'Contacts', 'Sales', 'Projects', 'Products', 'Purchases', 'Banking', 'Accounting', 'More', and 'Payroll'. The 'Orders' section is active, showing the order details. The order is in 'Pending' status. The main table lists the items, with one item 'Cello Bottle' having a quantity of 40.00 and a price of 40.00. The table also shows delivery and invoicing details, including 'Quantity delivered', 'Quantity pending', 'Quantity invoiced', and 'Quantity pending'. The total amount is 1'600.00, plus tax 129.60, resulting in an amount including tax of 1'729.60. The right sidebar contains 'STATUS ACTIONS' (Create delivery, Create invoice, Order has been filled, Cancel order) and 'ACTIONS' (Email order, Print order (PDF), View in bexio network, Duplicate order, Preview, Edit template).

Type	Item	Description	Quantity	Individual price	Discount	Price in CHF
1	Cello Bottle		40.00	pc	40.00	1'600.00
			(UNB1 - Revenue (HSI 8.10%))		Gross proceeds credit sales	
Delivery			Invoicing			
Quantity delivered: 0.00			Quantity invoiced: 0.00			
Quantity pending: 40.00			Quantity pending: 40.00			
Total			1'600.00			
Plus tax 8.10%:			129.60			
Amount incl. tax			1'729.60			

Fig 16 – Bexio order

When placing order from Magento store it will be synced in Bexio app.

If there any currency difference the admin will notify by a message in sales order view page in the backend.



#000000253

← Back Login as Customer Cancel Send Email Hold Invoice Ship Reorder Edit

testtt
city, St. Gallen, 4521
Switzerland
T: 2154875421
F: awew264

testtt
city, St. Gallen, 4521
Switzerland
T: 2154875421
F: awew264

Payment & Shipping Method

Payment Information
Cash On Delivery
The order was placed using USD.

Shipping & Handling Information
Flat Rate - Fixed \$5.00

Bexio Notification
Currency difference in magento and bexio order


Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Noise smart watch SKU: 1359231	Ordered	\$75.00	\$75.00	Ordered 1	\$75.00	\$6.08	8.1%	\$0.00	\$81.08

Fig 16.1 - Bexio Notification

Note: The order cancellation will not support in Bexio.

When a cart rule discount is applied on Magento order, it will also be synced in Bexio app.

Item	Price	Qty	Subtotal
 test bexio-7	\$18.50	1	\$18.50

[Move to Wishlist](#)

Update Shopping Cart

Summary

Estimate Shipping and Tax

Subtotal \$18.50

Discount (5 amount discount) -\$5.00

Shipping (Flat Rate - Fixed) \$4.63

Order Total \$18.13

Proceed to Checkout

Fig 17 - Magento cart rule application



Type	Item	Description	Quantity	Individual price	Discount	Price in USD
	1	test bexio-7 SKU:test bexio-7	1.00	pc 18.50 (UN81 - Revenue (NIS) 8.10%)	0.00%	18.50 Gross proceeds credit sales
		Delivery				
		Quantity delivered:	0.00			Quantity invoiced:
		Quantity pending:	1.00			Quantity pending:
	2	Shipping Amount	1.00	h 4.63 (UN81 - Revenue (NIS) 8.10%)		4.63 Gross proceeds credit sales
		Delivery				
		Quantity delivered:	0.00			Quantity invoiced:
		Quantity pending:	1.00			Quantity pending:
—		5 amount discount				-5.00
		Total				18.13
		Tax included in the price 8.10%:				1.36
		Amount incl. tax				18.13

Fig 17.1 - Cart rule is synced to Bexio app

1.1) Shipping Product

While adding API key in Magento admin, default shipping product will be created in Bexio in-order to save the shipping amount in order.

Fig 18 – Bexio shipping product.

1.2) Tax Configuration

Go to Magento admin -> Store-> Tax rule and Rates -> Add Tax zone and Tax rate.



Tax Rate Information

Tax Identifier *	<input type="text" value="bexiotax"/>
Zip/Post is Range	<input type="checkbox"/>
Zip/Post Code *	<input type="text" value="*"/>
<small>* - matches any; 'xyz*' - matches any that begins on 'xyz' and are not longer than 10.</small>	
State	<input type="text" value="*"/> ▼
Country *	<input type="text" value="Switzerland"/> ▼
Rate Percent *	<input type="text" value="8.1000"/>

Fig 19 – Magento tax configuration

Note: The Tax rate in Magento should be configured same as in Bexio. Otherwise, there will be chance for variation in the order total.

7) Invoice

New Invoice

← Back Reset

Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Total
Cello Bottle SKU: 1ce556	US\$40.00	Ordered 1	<input type="text" value="1"/>	US\$40.00	US\$0.00	US\$0.00	US\$40.00

Update Qty's

Order Total

Invoice History

Invoice Comments

Invoice Totals

Subtotal	US\$40.00
Shipping & Handling	US\$5.00
Grand Total	US\$45.00

☐ Append Comments
☒ Email Copy of Invoice

Submit Invoice

Fig 20 – Invoice

Go to sales order in Magento backend and submit invoice. At the same time, invoice will be created in Bexio for the same order. For online payments, if the payment is not captured, then status of invoice is set as 'Pending' instead of 'Paid' in Bexio. The status of invoice in Bexio is set as Paid when payment is captured in Magento as shown in Figure 22.



Orders »
Order AU-00024 - Test

Items

Conditions

Address

Texts

Document flow

Settings

Add standard position

Add product

+ More Items

Type

Item

Description

Quantity

Individual price

Discount

Price in CHF

1

Cello Bottle

40.00

pc

40.00
(UN81 - Revenue (HS)
8.10%)

1'600.00
Gross proceeds credit
sales

Delivery

Invoicing

Quantity delivered:

0.00

Quantity pending:

40.00

Quantity invoiced:

40.00

Total

Plus tax 8.10%:

Amount incl. tax

1'600.00

129.60

1'729.60

+ Add Item

Internal

Public

This comment is only visible within bexio.

Write a comment ...

Fig 21 – Bexio invoice

02.12.2024	RE-00194	Pending	31.12.2024	tester187k tester187k	BASE_#000000323	USD	18.50	18.50		Actions
02.12.2024	RE-00193	Paid	31.12.2024	tester187k tester187k	BASE_#000000322	USD	18.50	18.50		Actions
02.12.2024	RE-00192	Paid	31.12.2024	tester187k tester187k	BASE_#000000321	USD	18.50	18.50		Actions
02.12.2024	RE-00191	Paid	31.12.2024	tester187k tester187k	BASE_#000000320	USD	23.13	23.13		Actions
02.12.2024	RE-00190	Paid	31.12.2024	tester187k tester187k	BASE_#000000319	USD	18.50	18.50		Actions
02.12.2024	RE-00189	Paid	31.12.2024	tester187k tester187k	BASE_#000000318	USD	18.50	18.50		Actions

Fig 22 – List of invoices with different statuses



8) Shipment

New Shipment

← BackReset

Inventory

Source: Default Source

Items to Ship

Product	Qty	Qty to Ship
Cello Bottle	Ordered 1	1
SKU: 1ce556	Invoiced 1	

Shipment Total

Shipment Comments

Comment Text

Shipment Options

☐ Append Comments

☐ Email Copy of Shipment

Submit Shipment

Fig 23 – Shipment

Go to Magento sales order in the backend and create shipment. At the same time, shipment will be created, and order status will be updated to “Done” in Bexio for the same order.

Orders »

Order AU-00025 - Test

ItemsConditionsAddressTextsDocument flowSettings

Add standard positionAdd product+ More Items

TypeItemDescriptionQuantityIndividual priceDiscountPrice in CHF

1Cello Bottle40.00pc40.001'600.00

(UNB1 - Revenue (NS)8.10%)Gross proceeds credit sales

Delivery

Quantity delivered:0.00

Quantity commissioned:40.00

Invoicing

Quantity invoiced:40.00

Total

1'600.00

Plus tax 8.10%:

129.60

Amount incl. tax

1'729.60

+ Add Item

Fig 24 – Bexio Shipment



9) Bexio to Magento Order Sync

Login to Bexio dashboard then click on Sales->orders and create an order.

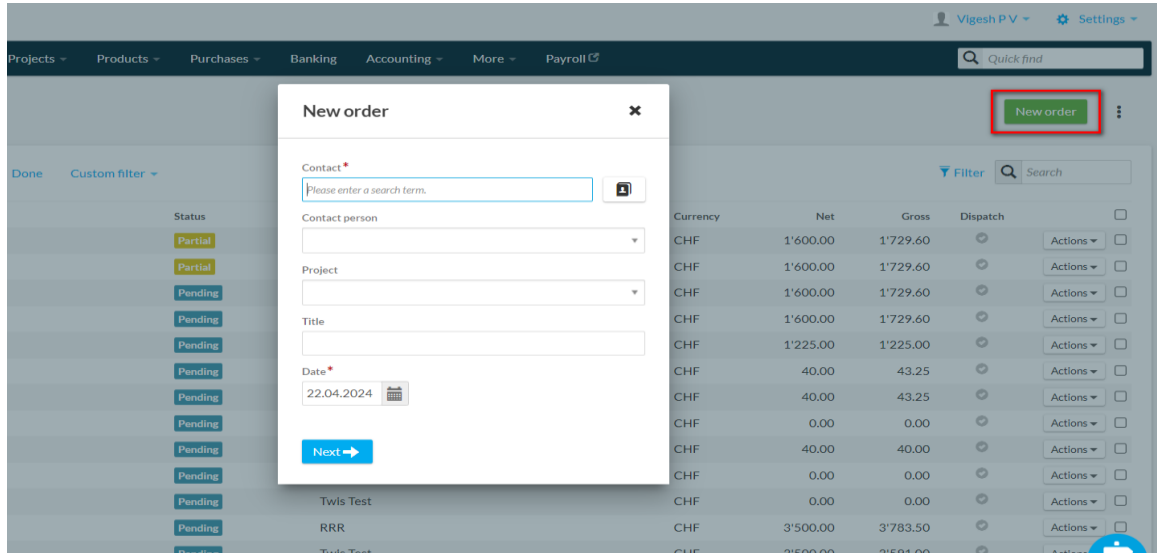


Fig 25 - Bexio order create

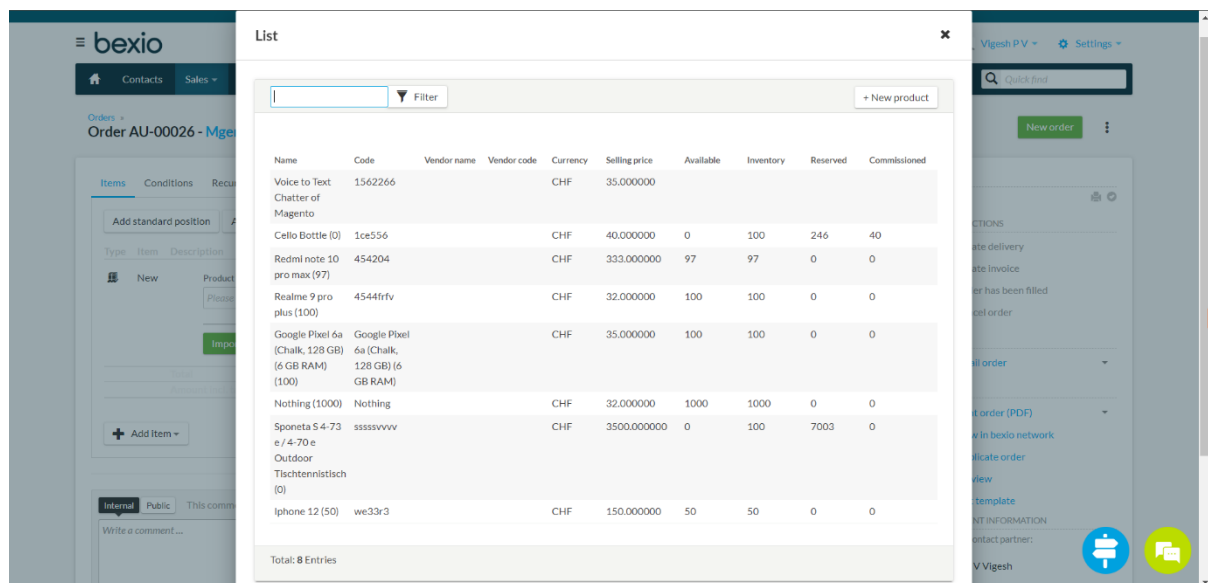


Fig 25.1 – Bexio order create

Select products you want to purchase and then click on the import product button.



Items Conditions Recurring order Partial invoices Address Texts Document flow Settings

Add standard position Add product + More items

Type Item Description Quantity Individual price Discount Price in CHF

New

Cello Bottle
Product code: 1ce556
Html code for

Quantity* 1

Unit pc

Account* 3200 - Gross proceeds credit s...

Individual price 40

Discount in %

Tax rate* UN81 - Revenue (NS) 8.10%

☐ Optional

Total: CHF 40.00

Save Cancel

Total 0.00

Amount incl. tax 0.00

Fig 25.2– Bexio order create

Items Conditions Recurring order Partial invoices Address Texts Document flow Settings

Add standard position Add product + More items

Type Item Description Quantity Individual price Discount Price in CHF

1 1.00 pc 0.00 0.00

(UN81 - Revenue (NS) 8.10%) Gross proceeds credit sales

Delivery Invoicing

Quantity delivered: 0.00 Quantity invoiced: 0.00

Quantity pending: 1.00 Quantity pending: 1.00

Total 0.00

Plus tax 8.10%: 0.00

Amount incl. tax 0.00

+ Add item

Fig 25.3 Bexio Order Create

This order will be synced to Magento based on the scheduled cronjob.

Note:

- Once order syncing is done. The Bexio order edit will not update in Magento.
- If there is no shipping product in Bexio order, the Magento will take shipping method from Bexio configuration.



Bulk Action

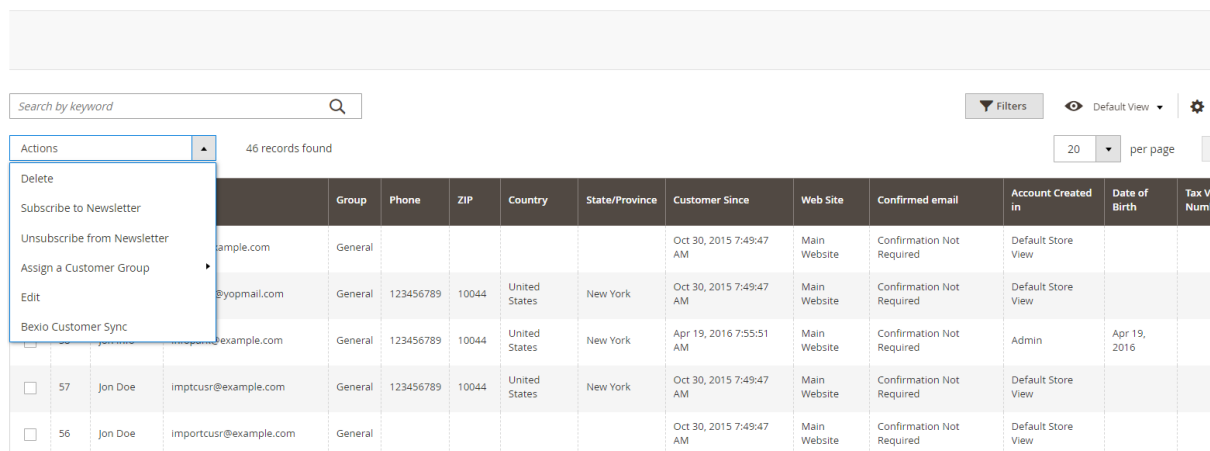
Customer Bulk Action

In-order to sync all existing customer to Bexio we have custom command to do the same.

php bin/magento bexio:customer_sync

Also, from admin customer grid also we provide mass action to sync customer to Bexio

Customers



The screenshot shows the Magento Admin Customer Grid. At the top, there is a search bar with the text "Search by keyword" and a magnifying glass icon. To the right of the search bar are buttons for "Filters", "Default View", and a settings icon. Below the search bar, a dropdown menu is open, showing the following options: "Delete", "Subscribe to Newsletter", "Unsubscribe from Newsletter", "Assign a Customer Group", "Edit", and "Bexio Customer Sync". The grid itself displays 46 records found. The columns are: "Group", "Phone", "ZIP", "Country", "State/Province", "Customer Since", "Web Site", "Confirmed_email", "Account Created in", "Date of Birth", and "Tax V Num". The first few rows of data are visible, showing customer information such as "Jon Doe" and "importcusr@example.com".

Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed_email	Account Created in	Date of Birth	Tax V Num
General					Oct 30, 2015 7:49:47 AM	Main Website	Confirmation Not Required	Default Store View		
General	123456789	10044	United States	New York	Oct 30, 2015 7:49:47 AM	Main Website	Confirmation Not Required	Default Store View		
General	123456789	10044	United States	New York	Apr 19, 2016 7:55:51 AM	Main Website	Confirmation Not Required	Admin	Apr 19, 2016	
General	123456789	10044	United States	New York	Oct 30, 2015 7:49:47 AM	Main Website	Confirmation Not Required	Default Store View		
General					Oct 30, 2015 7:49:47 AM	Main Website	Confirmation Not Required	Default Store View		

Fig 26

Product Bulk Action

In-order to sync all existing Product to Bexio we have custom command to do the same.

php bin/magento bexio:product_sync

Also, from admin Product grid also we provide mass action to sync product to Bexio.



Go to <https://developer.bexio.com> and click on “Personal Access Token”. Then click on create new token.

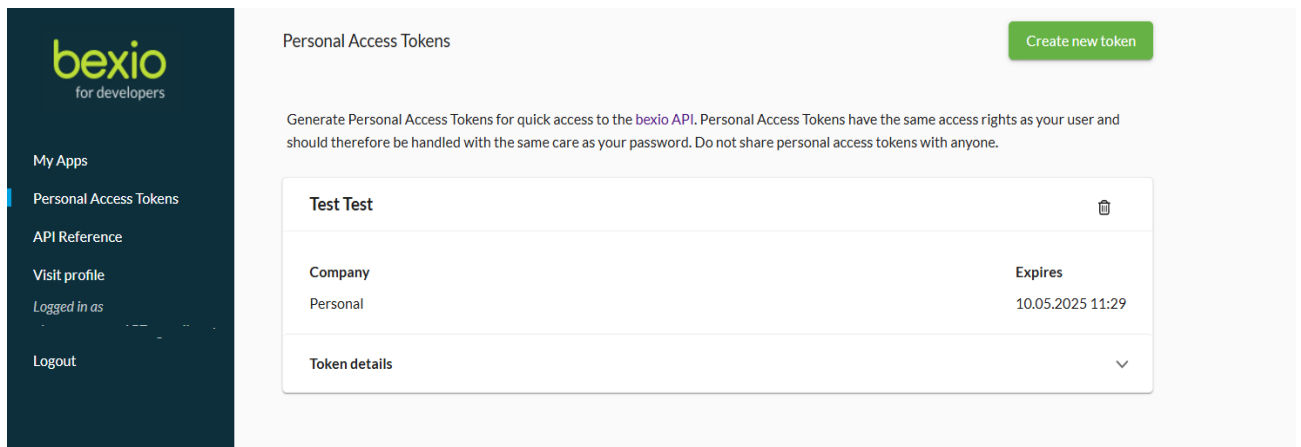


Fig 27 – Token generation

Constraints, assumptions & dependencies

1) Customer Integration

- In Bexio, customer address will update only when editing customer address from Magento.
- When you change the customer's country from address it will only reflect in Bexio if any matches the country in Bexio, otherwise default country "Switzerland" will take.

2) Order Integration

- Magento's order increment id set as the title of order and invoice in Bexio.
- In Bexio, there is no shipping method. So, we create a default shipping product in Bexio and save the corresponding shipping amount to it.
- The tax rate should be same in both Magento and Bexio.
- When syncing from Bexio to Magento, cash payments are taken as COD and other payments are marked as Money Order.

3) Product Integration

- Only relevant fields are synced in Bexio.
- Shipping products from Bexio are not synced in Magento.
- Only new products are synced from Bexio to Magento. If you edit Product data and make any changes in Bexio, it will not reflect in Magento. Admin will have to manually update in Magento.



- Inventory management syncing is not possible.

Notes:

Magento base currency amounts are synced to Bexio

Technical Requirements / Compatible with:

- Magento Open Source 2.4.x

Supported Languages

- English, German, French

Change Log / Release Notes

Version 1.0.2: June 2025

- Integrated new Bexio customer address API changes.

Version 1.0.1: February 2025

- Synchronize VAT/MWST amounts with Bexio.
- Added control over invoice creation in Bexio, including paid and unpaid status.
- Synchronize cart rule discounted order totals with Bexio.

Version: 1.0.0: April 2024

- Initial version

Support

If you have questions, use our contact form at webshopextension.com or email at support@webshopextension.com