



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.**

The screenshot shows the 'Configuration' screen for the 'Pits Extension' module. The left sidebar lists various configuration categories: GENERAL, PITS EXTENSIONS, CATALOG, SECURITY, CUSTOMERS, SALES, HYVA THEMES, and PROFILES. The 'Pits Bexio' sub-module under 'PITS EXTENSIONS' is currently selected. The main content area displays the 'General Settings' for Bexio, which include sections for Customer, Product, and Order. A 'Save Config' button is located in the top right corner of the main content area.

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

Enable [store view] Yes Enable/Disable module

API Key [store view] Generate api key [Click here](#)

Select Users [store view] Test1 Test11 ▼

Currency [store view] USD ▼ 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 ⊖

Create API Url [store view] https://api.bexio.com/2.0/contact Click here. Leave blank for disable

Contact Type [store view] Private ▼

Enable Bexio To Magento Sync [store view] No ▼ 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 the Bexio interface. It includes fields for creating an API URL (set to https://api.bexio.com/2.0/article), selecting users (test test), choosing a unit ID for normal products (pc), selecting tax for Bexio products (UEX - Export/Exempt 0.00%), choosing a default tax class for products (Taxable Goods), enabling Bexio to Magento sync (set to Yes), and a checkbox for using system values. A note at the bottom indicates the option to fetch products from Bexio to Magento while cron is running.

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
[store view]
Click here. Leave blank for disable

Header
[store view]
6

Footer
[store view]
6

Template
[store view]
▼

Payment Type
[store view]
▼
Select the payment type for Bexio order sync

Bexio Email Subject
[store view]
Enter email subject of bexio invoice

Bexio Email Content
[store view]
▲ ▾
Enter email content of bexio invoice

Attach Pdf
[store view]
▼
Attach Pdf in bexio invoice mail

Enable Bexio To Magento Sync
[store view]
▼
Option to fetch orders from bexio to magento while cron running

Shipping Method
[store view]
▼
Choose the shipment method for Bexio to Magento order sync

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.



✓ Thank you for registering with Main Website Store.

My Account

- My Orders
- My Downloadable Products
- My Wish List

- Address Book
- Account Information
- Stored Payment Methods

- My Product Reviews
- Newsletter Subscriptions

Compare Products

You have no items to compare.

My Wish List

My Account

Account Information

Contact Information

Bexio Customer
bexiocustomer@yopmail.com

[Edit](#) | [Change Password](#)

Newsletters

You aren't subscribed to our newsletter.

[Edit](#)

Address Book [Manage Addresses](#)

Default Billing Address

You have not set a default billing address.

[Edit Address](#)

Default Shipping Address

You have not set a default shipping address.

[Edit Address](#)

Fig 6- Customer creation in magento

← Back to contacts

000009 - Bexio [Edit](#) [Print](#)

Import/Export [New contact](#)

[Overview](#) [Finances](#) [Hourly rates](#) [More](#)

[Actions](#)

[Linked contacts](#) [Additional addresses](#) [Bank accounts](#)

Bexio
Partner

Address: Switzerland [Contact partner](#) Vigesh P V

Show in Google Maps

Phone: [bexiocustomer@yopmail.com](#)

Phone 2: [VAT no.](#)

Mobile: [Commercial Register no.](#)

Fax: [Email: \[Website: \\[Skype:\\]\\(#\\)\]\(#\)](#)

[Add new contact](#) [Link contact](#)

[Print](#) [Email](#)

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.

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

Vigesh PV [Settings](#)

Contacts

New contact

| Type | Name | Postcode | City | Country | Email | Phone |
|--------|-------------|----------|---------|-------------|----------------------------|------------|
| Person | Bexio | | | Switzerland | bexiocustomer@yopmail.com | |
| Person | Chotta scsc | | | Switzerland | chotta@yopmail.com | |
| Person | dev Vigesh | x | rrr | Switzerland | vigesh.pv@pitsolutions.com | 123456789 |
| Person | Mgen | 4344 | tee | Switzerland | mgen123@yopmail.com | 111111111 |
| Person | RRR | | | Switzerland | rrr@yopmail.com | |
| Person | Test | | | Switzerland | testuser@yopmail.com | |
| Person | Test Twis | | Goerage | Switzerland | vigeshdeveloper@gmail.com | 5487214587 |

7 contacts

Pits Company [Facebook](#) [Blog](#)

Fig 8 - Bexio customer create

Back to contacts [Import/Export](#) [New contact](#)

000010 - Test

Overview Finances Hourly rates More

Address: Test street, Kannur, Switzerland. Contact partner: Vigesh PV. Correspondence type: Email. Show in Google Maps.

Phone: 123456789. Mobile: 123456789. Fax: 5555. Email: test352@yopmail.com.

Linked contacts Additional addresses Bank accounts

No entries available.

Add new contact Link contact

Notes Tasks Projects Time tracking Quotes Orders Invoices Credit notes Expenses Bills Files

Fig 8.1 Bexio customer create



| Customers | | | | | | | | | | | | | | | Add New Customer | |
|--------------------------|----|------------------|---------------------------|---------|------------|------|---------------|----------------|----------------------|--------------|---------------------------|--------------------|---------------|----------------|------------------|----------------------|
| Actions | | Customer Details | | | | | | | | | | | | | Actions | |
| | 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 | | | | | 2024-03-30 03:50:23 | | 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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Fig 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 [website] | <input checked="" type="checkbox"/> Yes |
| Attribute Set | Default |
| Product Name [store view] * | Iphone 14 |
| SKU [global] * | iphone12354 |
| Price [global] * | \$ 40.00 |
| Advanced Pricing | |
| Tax Class [website] | Taxable Goods |

Fig 10 – Product create

The screenshot shows the Bexio product management interface. At the top, there is a navigation bar with 'Product' and a search bar containing 'iphone12354 - Iphone 14 (100)'. Below the search bar are two tabs: 'Master data' (selected) and 'Tiered price'. The 'Master data' section contains fields for 'Contact partner' (P V Vigesh), 'Product type' (Goods), 'Group', 'Product code' (iphone12354), 'Product name' (Iphone 14), and 'Product description'. The 'Price information' section shows 'Purchase price' (40.00+ surcharge in % 0.00), 'Selling price' (40.00 - Profit margin in % 0.00), 'Currency' (CHF), 'Unit', 'Sales tax for VAT', and 'Pre-tax for VAT'. The 'Actions' section includes links for 'Duplicate this product', 'Add new product in a series', and 'Enter product in a set'. The 'Inventory management' section shows 'Warehouse location', 'Bin location', 'Minimum inventory' (1), and 'Inventory' (100).

Fig 11 – Bexio Product

4) Product Deletion

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

The screenshot shows the Bexio tax configuration interface. It displays a dropdown menu for 'Default Tax Class for Product' with the option 'Taxable Goods' selected. There is also a checkbox labeled 'Use system value' and a link 'Select tax class for magento products'.

Fig 12 – Tax Config for syncing from Bexio to Magento

The screenshot shows the Bexio product grid. At the top, there is a navigation bar with 'bexio' and a search bar. Below the search bar is a 'Product' section with a 'New product' button, which is highlighted with a red box. The main area displays a grid of products with columns for 'Name', 'Code', 'Currency', 'Purchase price', and 'Selling price'. The products listed include 'Cello Bottle', 'Google Pixel 6a (Chalk, 128 GB) (6 GB RAM)', 'Iphone 12', 'Iphone 14', 'Nothing', 'Realme 9 pro plus', 'Redmi note 10 pro max', 'Sponeta S 4-73 e / 4-70 e Outdoor Tischtennistisch', and 'Voice to Text Chatter of Magento'. At the bottom, there are buttons for 'Entries 1-9 of 9', 'Select an action', and 'Go'.

Fig 13 – Bexio product grid



Product > bexss - Bexio Test Product

Master data Tiered price

| bexss - Bexio Test Product | | Price information | | Actions | |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|----------------------------------|---------|-----------------------------|
| Contact partner: | P V Vigesh | Ø Purchase price: | 25.00+ surcharge in % 20.00 | | Duplicate this product |
| Product type: | Goods | Ø Selling price: | 30.00 - Profit margin in % 16.67 | | Add new product in a series |
| Group: | | Currency: | USD | | Enter product in a set |
| Product code: | bexss | Unit: | pc | | |
| Product name: | Bexio Test Product | Sales tax for VAT: | UEX - Export/Exempt 0.00% | | |
| Product description: | <p>Lorum Ipsum is simply dummy text of the printing and typesetting industry. Lorum Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorum Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorum Ipsum.</p> | Pre-tax for VAT: | ZOLLM - Import Mat/SV 100.00% | | |

Fig 13.1 Bexio product management page.

Products

Add Product

| Actions | ID | Thumbnail | Name | Type | Attribute Set | SKU | Price | Quantity | Salable Quantity | Visibility | Status | Websites | Last Updated At | Action |
|--------------------------|----|-----------|--------------------|----------------|---------------|-------------|------------|-----------|---------------------|-----------------|---------|--------------|----------------------|----------------------|
| <input type="checkbox"/> | 8 | | 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 |
| <input type="checkbox"/> | 10 | | 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 |
| <input type="checkbox"/> | 11 | | 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 |
| <input type="checkbox"/> | 12 | | 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 |
| <input type="checkbox"/> | 13 | | 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... Search



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 screenshot shows the bexio (Odoo) sales order interface. The top navigation bar includes 'Sales' (which is highlighted in blue), 'Projects', 'Products', 'Purchases', 'Banking', 'Accounting', 'More', and 'Payroll'. The top right shows the user 'Vigesh PV' and a 'Settings' dropdown. A 'Quick find' search bar is at the top right. The main title is 'Order AU-00021 - Test'. On the right, there are 'STATUS' (Pending), 'STATUS ACTIONS' (Create delivery, Create invoice, Order has been filled, Cancel order), 'SEND' (Email order), and 'ACTIONS' (Print order (PDF), View in bexio network, Duplicate order, Preview, Edit template). The main content area shows an order line for 'Cello Bottle' with a quantity of 40.00, individual price of 40.00, and a total price of 1'600.00. It also shows delivery and invoicing details, including tax information. A 'More items' button is at the bottom left of the order table.

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 | testt 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 | 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 Edit 

[Update Shopping Cart](#) [Proceed to Checkout](#)

| | |
|---------------------------------------------------------------------------------------------------------------------------------|----------------|
| Summary | |
| Estimate Shipping and Tax  | |
| Subtotal | \$18.50 |
| Discount (5 amount discount) | -\$5.00 |
| Shipping (Flat Rate - Fixed) | \$4.63 |
| Order Total | \$18.13 |

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 (UNB1 - Revenue (NS) 8.10%) | 18.50 0.00% | 18.50 Gross proceeds credit sales |
| Delivery | | | | | | |
| | | Quantity delivered: 0.00 | | | Quantity invoiced: 0.00 | |
| | | Quantity pending: 1.00 | | | Quantity pending: 1.00 | |
| 2 | Shipping Amount | | 1.00 | h (UNB1 - Revenue (NS) 8.10%) | 4.63 | 4.63 Gross proceeds credit sales |
| Delivery | | | | | | |
| | | Quantity delivered: 0.00 | | | Quantity invoiced: 0.00 | |
| | | Quantity pending: 1.00 | | | Quantity pending: 1.00 | |
| - | 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.

The screenshot shows the 'Edit' screen for a product in Bexio. The product type is 'flatrate_flatrate - Flat Rate'. The 'Master data' section includes fields for Product type (flatrate_flatrate), Service (flatrate_flatrate), Product code (flatrate_flatrate), Product name (Flat Rate), and Product description. The 'Vendor data' section includes fields for Vendor (P V Vigesh), Product name (vendor), Product code (vendor), and Product description (vendor). The 'Price information' section includes fields for Purchase price (5.000000), + surcharge in % (0.00), Selling price (5.000000), Profit margin in % (0.00), Currency (CHF), and Unit (h). The 'Remarks/Notes' section contains a text area. On the right side, there are two circular icons: a blue one with a minus sign and a green one with a plus sign.

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 *

Zip/Post is Range

Zip/Post Code * ^4* - matches any: 'xyz^4' - matches any that begins on 'xyz' and are not longer than 10.

State

Country *

Rate Percent *

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 | US\$40.00 | Ordered 1 | <input type="text" value="1"/> | US\$40.00 | US\$0.00 | US\$0.00 | US\$40.00 |
| SKU: 1ce556 | | | | | | | |

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

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 (UN01 - Revenue (HS) 8.10%) | | 1'600.00 Gross proceeds credit sales |
| Delivery | | | Invoicing | | | |
| Quantity delivered: 0.00 | | | Quantity invoiced: 40.00 | | | |
| Quantity pending: 40.00 | | | | | | |
| Total | | | 1'600.00 | | | |
| Plus tax 8.10%: | | | 129.60 | | | |
| Amount incl. tax | | | 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

Inventory

Source: Default Source

Items to Ship

| Product | Qty | Qty to Ship |
|-----------------------------|-------------------------|--------------------------------|
| Cello Bottle SKU: 1ce556 | Ordered 1 Invoiced 1 | <input type="text" value="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

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 (UNB1 - Revenue (N5) 8.10%) | | 1'600.00 Gross proceeds credit Sales |

Delivery Invoicing

Quantity delivered: 0.00 Quantity invoiced: 40.00

Quantity commissioned: 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.

New order

Contact*
Please enter a search term.

Contact person

Project

Title

Date*
22.04.2024

Next →

Twis Test

RRR

Twis Test

| Currency | Net | Gross | Dispatch | Actions |
|----------|----------|----------|----------|---------|
| CHF | 1'600.00 | 1'729.60 | ... | Actions |
| CHF | 1'600.00 | 1'729.60 | ... | Actions |
| CHF | 1'600.00 | 1'729.60 | ... | Actions |
| CHF | 1'600.00 | 1'729.60 | ... | Actions |
| CHF | 1'225.00 | 1'225.00 | ... | Actions |
| CHF | 40.00 | 43.25 | ... | Actions |
| CHF | 40.00 | 43.25 | ... | Actions |
| CHF | 0.00 | 0.00 | ... | Actions |
| CHF | 40.00 | 40.00 | ... | Actions |
| CHF | 0.00 | 0.00 | ... | Actions |
| CHF | 0.00 | 0.00 | ... | Actions |
| CHF | 3'500.00 | 3'783.50 | ... | Actions |
| CHF | 3'500.00 | 3'591.00 | ... | Actions |

Fig 25 - Bexio order create

List

| Name | Code | Vendor name | Vendor code | Currency | Selling price | Available | Inventory | Reserved | Commissioned |
|------------------|--------------|-------------|-------------|----------|---------------|-----------|-----------|----------|--------------|
| Voice to Text | 1562266 | | | CHF | 35.000000 | | | | |
| Chatter of | | | | | | | | | |
| Magento | | | | | | | | | |
| Cello Bottle (0) | 1ce556 | | | CHF | 40.000000 | 0 | 100 | 246 | 40 |
| Redmi note 10 | 454204 | | | CHF | 333.000000 | 97 | 97 | 0 | 0 |
| pro max (97) | | | | | | | | | |
| Realme 9 pro | 4544frfv | | | CHF | 32.000000 | 100 | 100 | 0 | 0 |
| plus (100) | | | | | | | | | |
| Google Pixel 6a | Google Pixel | | | CHF | 35.000000 | 100 | 100 | 0 | 0 |
| (Chalk, 128 GB) | 6a (Chalk, | | | | | | | | |
| (6 GB RAM) | 128 GB) (6 | | | | | | | | |
| (100) | GB RAM) | | | | | | | | |
| Nothing (1000) | Nothing | | | CHF | 32.000000 | 1000 | 1000 | 0 | 0 |
| | | | | | | | | | |
| Sponeeta S 4-73 | ssssssssss | | | CHF | 3500.000000 | 0 | 100 | 7003 | 0 |
| e (4-70 e | | | | | | | | | |
| Outdoor | | | | | | | | | |
| Tischtennistisch | | | | | | | | | |
| (0) | | | | | | | | | |
| Iphone 12 (50) | we33r3 | | | CHF | 150.000000 | 50 | 50 | 0 | 0 |
| | | | | | | | | | |

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 forf | Quantity* <input type="text" value="1"/> | Individual price <input type="text" value="40"/> | Discount in % <input type="text"/> | Price in CHF CHF 40.00 |
| Unit | pc | | Account* <input type="text" value="3200 - Gross proceeds credit s..."/> | Tax rate* <input type="text" value="UN81 - Revenue (NS) 8.10%"/> | | |
| <input type="checkbox"/> 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 (UN81 - Revenue (NS) 8.10%) | | 0.00 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

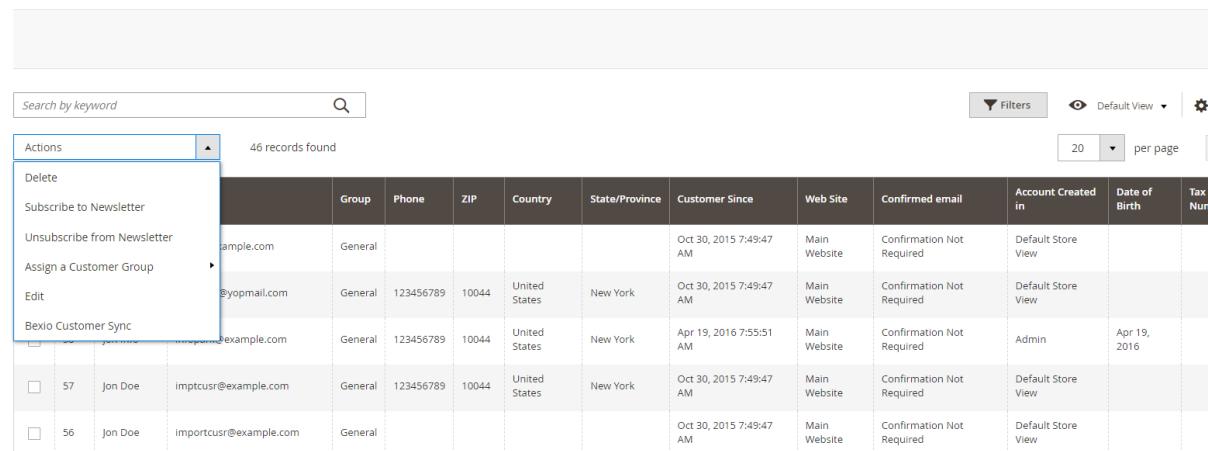
Customer Bulk Action

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 labeled 'Search by keyword' and a 'Filters' button. Below the search bar, the text '46 records found' is displayed. On the right, there are buttons for 'Default View', '20 per page', and a gear icon for settings. The grid itself has columns for Actions, ID, Name, Email, Group, Phone, ZIP, Country, State/Province, Customer Since, Web Site, Confirmed email, Account Created in, Date of Birth, and Tax Vat Num. A context menu is open over the first customer row, showing options: Delete, Subscribe to Newsletter, Unsubscribe from Newsletter, Assign a Customer Group, Edit, and Bexio Customer Sync. The 'Bexio Customer Sync' option is highlighted with a blue border.

| Actions | ID | Name | Email | Group | Phone | ZIP | Country | State/Province | Customer Since | Web Site | Confirmed email | Account Created in | Date of Birth | Tax Vat Num |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---------|------------------------|---------|-----------|-------|---------------|----------------|-------------------------|--------------|---------------------------|--------------------|---------------|-------------|
| Delete Subscribe to Newsletter Unsubscribe from Newsletter Assign a Customer Group Edit Bexio Customer Sync | 57 | Jon Doe | imptcusr@example.com | General | 123456789 | 10044 | United States | New York | Oct 30, 2015 7:49:47 AM | Main Website | Confirmation Not Required | Default Store View | | |
| | 56 | Jon Doe | importcusr@example.com | General | 123456789 | 10044 | United States | New York | Oct 19, 2016 7:55:51 AM | Main Website | Confirmation Not Required | Admin | Apr 19, 2016 | |
| | | | | | | | | | 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.



Products

The screenshot shows the Magento Admin Products grid. A context menu is open over a row for a product named 'Simple2'. The menu includes options like 'Delete', 'Change status', 'Update attributes', 'Assign Inventory Source', 'Unassign Inventory Source', 'Transfer Inventory To Source', and 'Bexio Product Sync'. The grid displays 39 records found, with columns for Actions, Type, Attribute Set, SKU, Price, Quantity, Salable Quantity, Visibility, Status, Websites, and Last Update. The 'Simple2' row is highlighted in blue.

| Actions | Type | Attribute Set | SKU | Price | Quantity | Salable Quantity | Visibility | Status | Websites | Last Update |
|---------|----------------|---------------|-----------------|-----------|----------|-------------------|-----------------|---------|--------------|-------------|
| Simple1 | Simple Product | Default | Test Product125 | CHF 17.00 | 96.0000 | Default Stock: 69 | Catalog, Search | Enabled | Main Website | May 9, 2024 |
| Simple2 | Simple Product | Default | 1230216 | CHF 35.00 | 98.0000 | Default Stock: 0 | Catalog, Search | Enabled | Main Website | May 3, 2024 |
| Simple3 | Simple Product | Default | simple1 | CHF 20.00 | 100.0000 | Default Stock: 96 | Catalog, Search | Enabled | Main Website | May 9, 2024 |
| Simple4 | Simple Product | Default | Simple2 | CHF 1.00 | 0.0000 | Default Stock: 0 | Catalog, Search | Enabled | Main Website | May 3, 2024 |

Fig 26.1

Order Bulk Action

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

php bin/magento bexio:order_sync

Also, from admin Order grid also we provide mass action to sync order to Bexio.

Orders

The screenshot shows the Magento Admin Orders grid. A context menu is open over a row for an order placed on May 16, 2024. The menu includes options like 'Cancel', 'Hold', 'Unhold', 'Print Invoices', 'Print Packing Slips', 'Print Credit Memos', 'Print All', 'Print Shipping Labels', and 'Bexio Order Sync'. The grid displays 212 records found, with columns for Actions, Purchase Date, Bill-to Name, Ship-to Name, Grand Total (Base), Grand Total (Purchased), Status, Action, and Allocated so. The 'May 16, 2024' row is highlighted in blue.

| Actions | Purchase Date | Bill-to Name | Ship-to Name | Grand Total (Base) | Grand Total (Purchased) | Status | Action | Allocated so |
|--------------|-------------------------|--------------|--------------|--------------------|-------------------------|------------|----------------------|--------------|
| qa 7 | May 16, 2024 3:28:00 AM | qa 7 | qa 7 | \$30.00 | CHF 28.83 | Processing | View | |
| qa 6 | May 10, 2024 3:52:06 AM | qa 6 | qa 6 | \$29.32 | CHF 32.25 | Pending | View | |
| sasaa dafafa | May 8, 2024 4:38:47 AM | sasaa dafafa | sasaa dafafa | \$27.50 | CHF 30.25 | Pending | View | |
| test qa | May 6, 2024 2:23:19 AM | | | CHF 9.00 | CHF 9.00 | Pending | View | |

Fig 26.2

API Key Generation



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

| Personal Access Tokens | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| Generate Personal Access Tokens for quick access to the bexio API . Personal Access Tokens have the same access rights as your user and should therefore be handled with the same care as your password. Do not share personal access tokens with anyone. | |
| Test Test | Delete |
| Company | Expires |
| Personal | 10.05.2025 11:29 |
| Token details | |

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 (CE) 2.4.4 to 2.4.8
- Adobe Commerce (EE & Cloud) 2.4.4-2.4.8

Supported Languages

- English, German, French

Change Log / Release Notes

Version 1.0.3: December 2025

- Compatible with Adobe Commerce (EE & Cloud) for version 2.4.4-2.4.8.

Version 1.0.2: June 2025

- Integrated new Bexio customer address API changes.
- Compatible with Magento Open Source (CE) 2.4.4 to 2.4.8

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