



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**.

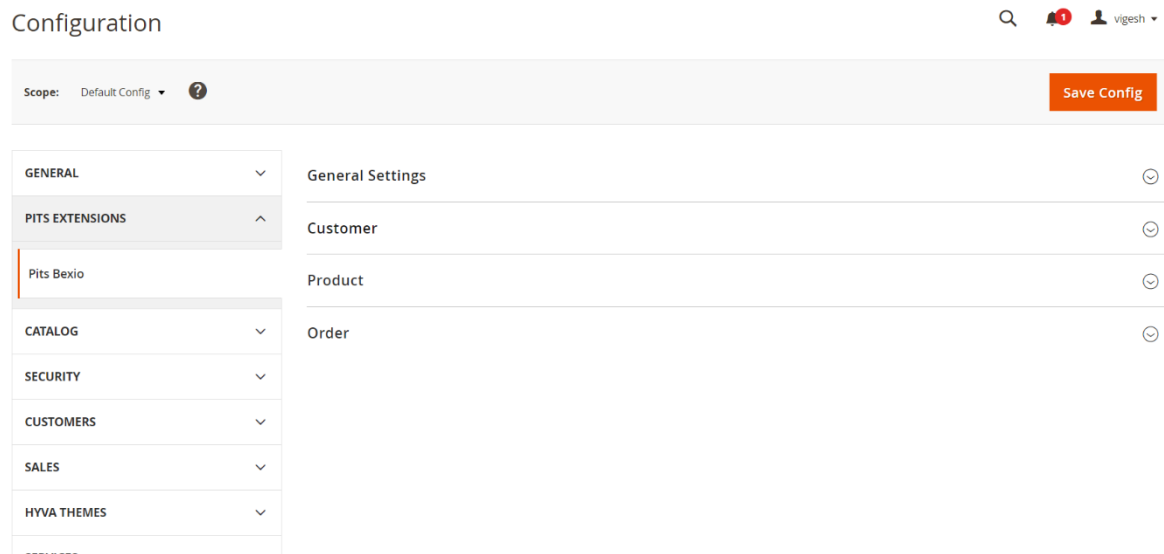


Figure 1 – Bexio Settings – Configuration

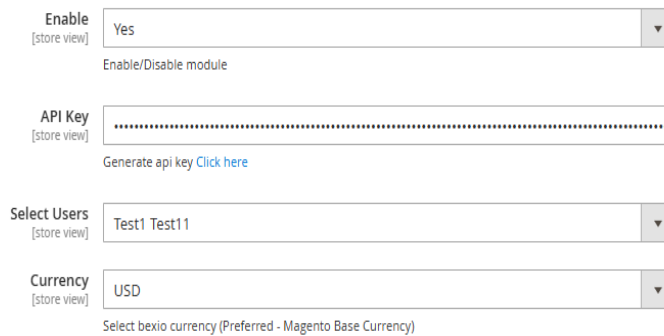
Figure 1 displays the admin configurations of the extension, these settings are categorized into four groups, each containing specific fields.

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:

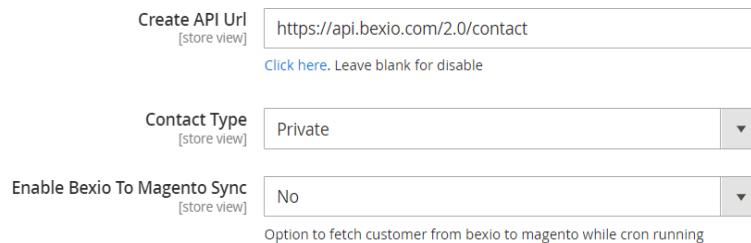
- Enable**: Set to 'Yes'. Below it is the text 'Enable/Disable module'.
- API Key**: A field containing a masked key (dots). Below it is the text 'Generate api key [Click here](#)'.
- Select Users**: Set to 'Test1 Test11'.
- Currency**: Set to 'USD'. Below it is the text 'Select bexio currency (Preferred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

- Create API Url** (store view): [Click here.](#) Leave blank for disable
- Select Users** (store view):
- Select Unit Id for Normal Product** (store view):
- Select Tax For Bexio Products** (store view):
- Default Tax Class for Product** (store view): ☐ Use system value Select tax class for magento products
- Enable Bexio To Magento Sync** (store view): Option to fetch products from bexio to magento while cron 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 <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.

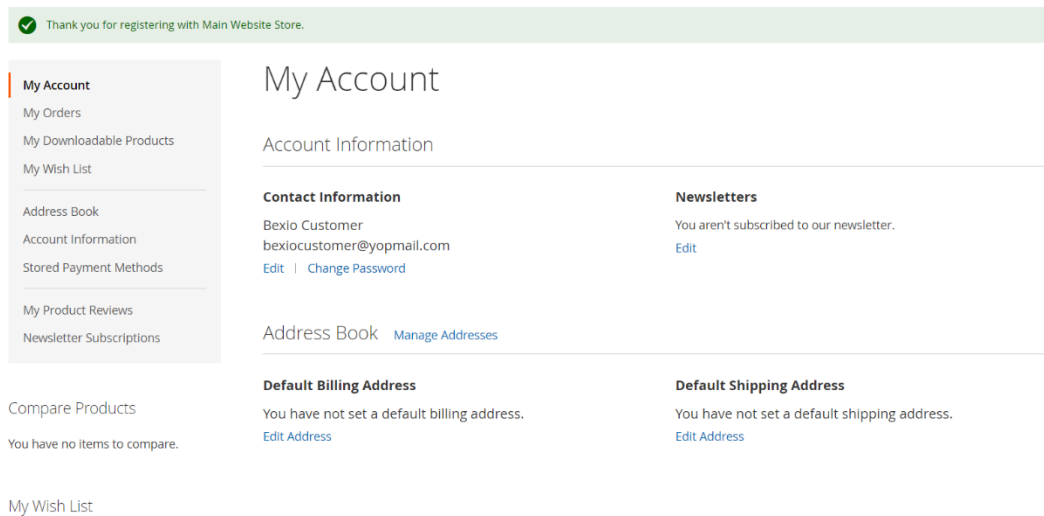


Fig 6– Customer creation in magento

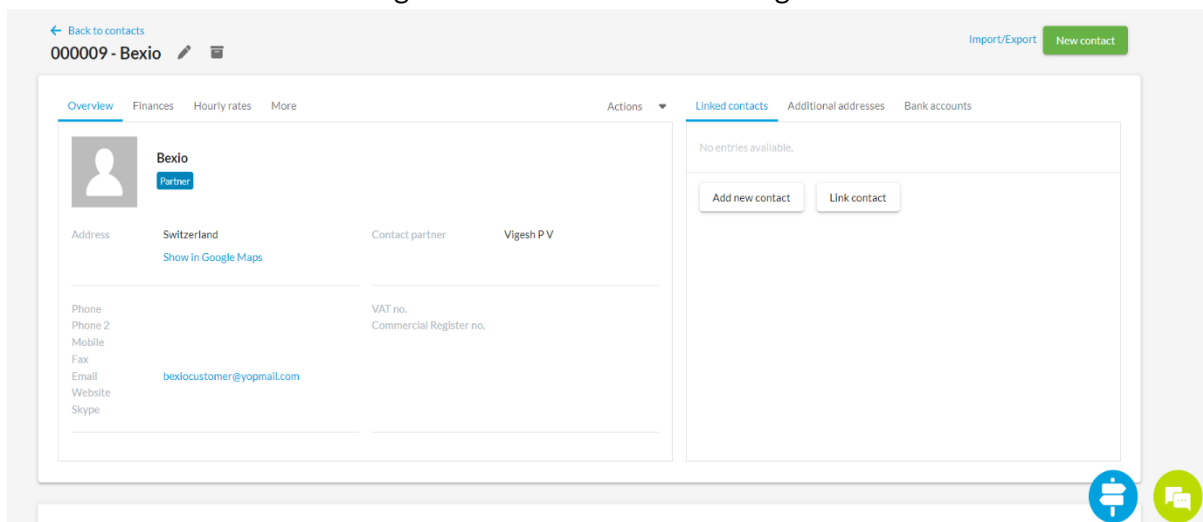


Fig 7 – Bexio customer

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.

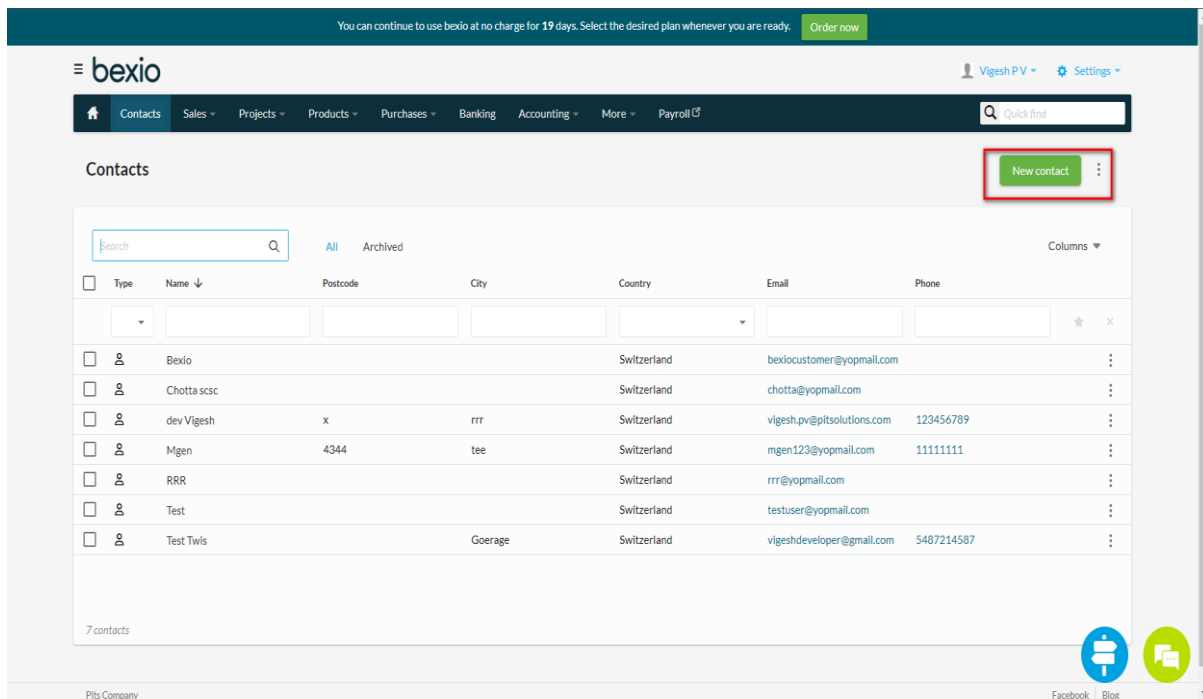


Fig 8 - Bexio customer create

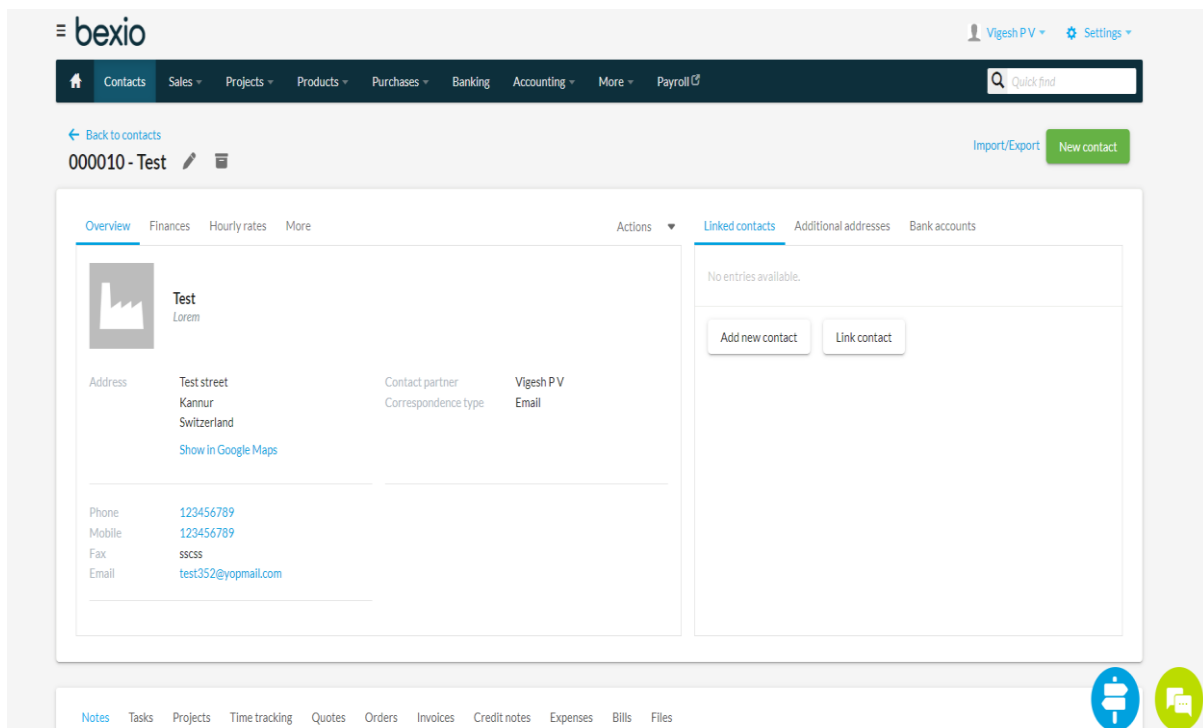


Fig 8.1 Bexio customer create



Customers

Add New Customer

Actions

10 records found

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👁

⚙

👤

20

<

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<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
☐	79	Chotta scsc	chotta@yopmail.com	General					17 Apr 2024 03:50:23		Confirmation Not Required	Admin				Edit
☐	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
☐	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
☐	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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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 [website]

Yes

Attribute Set [store view]

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 'Master data' tab for a product. It is divided into three main sections: Master data, Price information, and Actions.

Master data:

- Contact partner: P V Vigesh
- 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:

Inventory management:

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

Actions:

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

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.

The screenshot shows a configuration field for 'Default Tax Class for Product'. The dropdown menu is set to 'Taxable Goods'. There is a checkbox for 'Use system value' which is currently unchecked. Below the dropdown, there is a text label 'Select tax class for magento products'.

Fig 12 – Tax Config for syncing from Bexio to Magento

The screenshot shows the Bexio dashboard with the 'Products' tab selected. A 'New product' button is highlighted with a red box. Below the button is a table listing products.

Name	Code	Currency	Purchase price	Selling price	
Cello Bottle	1cc556	CHF	40.00	40.00	☐
Google Pixel 6a (Chalk, 128 GB) (6 GB RAM)	Google Pixel 6a (Chalk, 128 GB) (6 GB RAM)	CHF	14.00	35.00	☐
Iphone 12	we33r3	CHF	150.00	150.00	☐
Iphone 14	Iphone12354	CHF	40.00	40.00	☐
Nothing	Nothing	CHF	32.00	32.00	☐
Realme 9 pro plus	4544rrfv	CHF	32.00	32.00	☐
Redmi note 10 pro max	454204	CHF	333.00	333.00	☐
Sponeta S 4-73 e / 4-70 e Outdoor Tischtennistisch	ssssvvvv	CHF	3,500.00	3,500.00	☐
Voice to Text Chatter of Magento	1562266	CHF	14.00	35.00	☐

Fig 13 – Bexio product grid

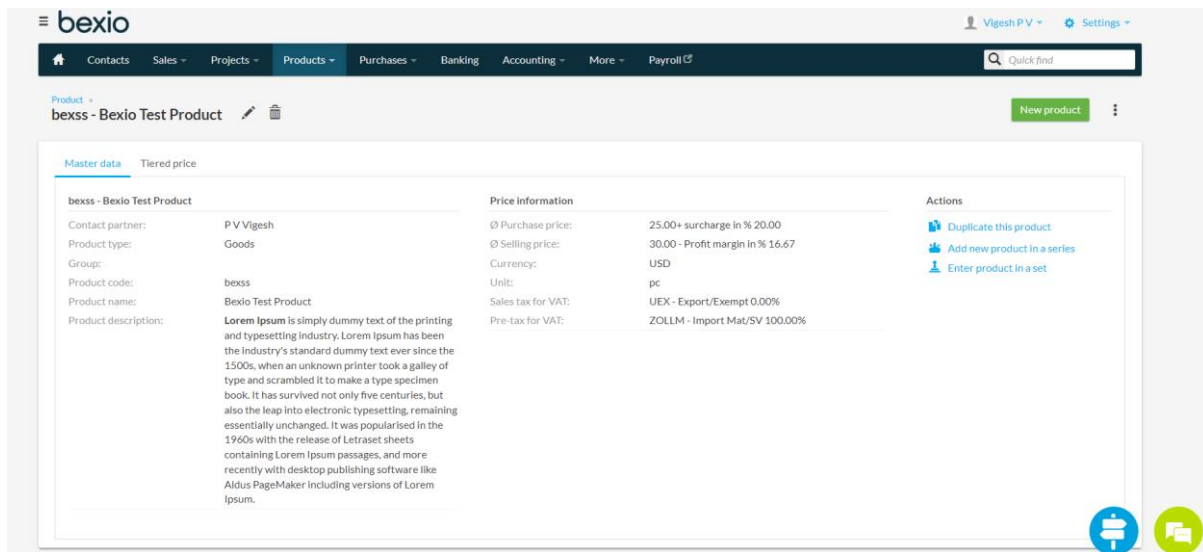


Fig 13.1 Bexio product management page.

Products

Add Product

Actions

10 records found

20

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<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!

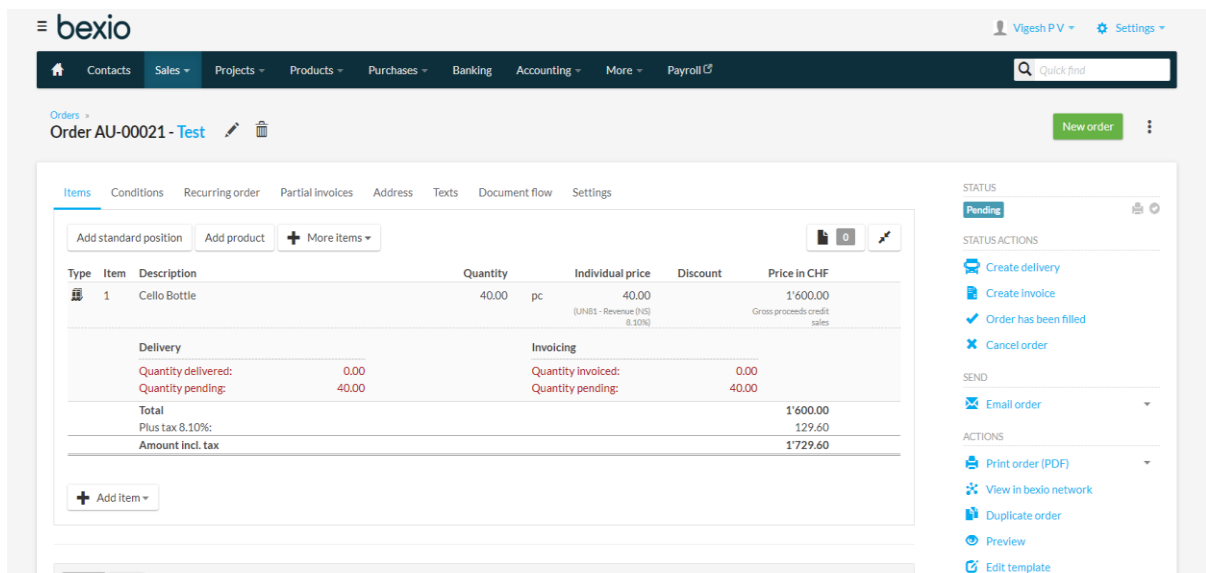
[Print receipt](#)

Your order number is: **000000187**.

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

[Continue Shopping](#)

Fig 15 – Magento order



The screenshot shows the Bexio web application interface for managing orders. The top navigation bar includes a home icon, 'Contacts', 'Sales' (selected), 'Projects', 'Products', 'Purchases', 'Banking', 'Accounting', 'More', and 'Payroll'. A search bar is on the right. Below the navigation bar, the 'Orders' section is active, showing 'Order AU-00021 - Test'. A 'New order' button is visible. The main content area displays a table with columns: Type, Item, Description, Quantity, Individual price, Discount, and Price in CHF. The table lists one item: 'Cello Bottle' with a quantity of 40.00 and an individual price of 40.00. Below the table, there are sections for 'Delivery' and 'Invoicing' with 'Quantity delivered/pending' and 'Quantity invoiced/pending' fields. A summary table at the bottom shows 'Total' (1'600.00), 'Plus tax 8.10%' (129.60), and 'Amount incl. tax' (1'729.60). On the right side, there is a 'STATUS' section showing 'Pending' and a list of 'STATUS ACTIONS' including 'Create delivery', 'Create invoice', 'Order has been filled', and 'Cancel order'. Below that, there is a 'SEND' section with 'Email order' and an 'ACTIONS' section with 'Print order (PDF)', 'View in bexio network', 'Duplicate order', 'Preview', and 'Edit template'.

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 (HS) 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 (HS) 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	☐
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 invoiced:		40.00					
Quantity pending:			40.00								
Total											
Plus tax 8.10%:											
Amount incl. tax											



8) Shipment

New Shipment

← BackReset

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

ItemsConditionsAddressTextsDocument flowSettings

Add standard positionAdd product+ More Items

TypeItemDescriptionQuantityIndividual priceDiscountPrice in CHF

	1	Cello Bottle	40.00	pc40.00 (UN181 - Revenue (NS) 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.

The image shows the Bexio dashboard with a 'New order' modal form open. The form contains the following fields:

- Contact* (with a search input and a dropdown icon)
- Contact person (dropdown)
- Project (dropdown)
- Title (text input)
- Date* (calendar icon, showing 22.04.2024)
- Next button (blue arrow)

In the background, a table of existing orders is visible. A 'New order' button is highlighted with a red box in the top right corner of the dashboard.

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

The image shows the Bexio 'List' modal, which displays a table of products. The table has the following columns: Name, Code, Vendor name, Vendor code, Currency, Selling price, Available, Inventory, Reserved, and Commissioned.

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 pro max (97)	454204			CHF	333.000000	97	97	0	0
Realme 9 pro plus (100)	4544frfv			CHF	32.000000	100	100	0	0
Google Pixel 6a (Chalk, 128 GB) (6 GB RAM) (100)	Google Pixel 6a (Chalk, 128 GB) (6 GB RAM) (100)			CHF	35.000000	100	100	0	0
Nothing (1000)	Nothing			CHF	32.000000	1000	1000	0	0
Sponeta S 4-73 e / 4-70 e Outdoor Tischtennistisch (0)	ssssvvvv			CHF	3500.000000	0	100	7003	0
Iphone 12 (50)	we33r3			CHF	150.000000	50	50	0	0

Total: 8 Entries

Fig 25.1 - Bexio order create

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



The screenshot shows the 'Bexio order create' form. At the top, there are tabs: Items, Conditions, Recurring order, Partial invoices, Address, Texts, Document flow, and Settings. Below the tabs are buttons: 'Add standard position', 'Add product', and '+ More items'. The main form area is divided into two columns. The left column contains a 'New' section with a product selection area showing 'Cello Bottle' with product code '1ce556' and a description 'Html code forf'. The right column contains input fields for 'Quantity' (1), 'Unit' (pc), 'Account' (3200 - Gross proceeds credit s...), 'Individual price' (40), 'Discount in %', 'Tax rate' (UN81 - Revenue (NS) 8.10%), and an 'Optional' checkbox. A 'Total' field shows 'CHF 40.00'. At the bottom, there are 'Save' and 'Cancel' buttons. A summary table at the very bottom shows 'Total' and 'Amount incl. tax' both as 0.00.

Type	Item	Description	Quantity	Individual price	Discount	Price in CHF
	1	Cello Bottle Product code: 1ce556 Html code forf	1	40		
Total:						CHF 40.00
Total						0.00
Amount incl. tax						0.00

Fig 25.2– Bexio order create

The screenshot shows the 'Bexio Order Create' form with a summary table. The table has columns: Type, Item, Description, Quantity, Individual price, Discount, and Price in CHF. The table contains one item: 'Cello Bottle' with quantity 1.00, unit pc, individual price 0.00, and price in CHF 0.00. Below the table, there are sections for 'Delivery' and 'Invoicing'. The 'Delivery' section shows 'Quantity delivered: 0.00' and 'Quantity pending: 1.00'. The 'Invoicing' section shows 'Quantity invoiced: 0.00' and 'Quantity pending: 1.00'. At the bottom, there is a 'Total' row showing 'Total' as 0.00, 'Plus tax 8.10%' as 0.00, and 'Amount incl. tax' as 0.00. There is also an 'Add item' button at the bottom left.

Type	Item	Description	Quantity	Individual price	Discount	Price in CHF
	1	Cello Bottle	1.00	0.00		0.00
Delivery						
Quantity delivered:				0.00		
Quantity pending:				1.00		
Invoicing						
Quantity invoiced:				0.00		
Quantity pending:				1.00		
Total						0.00
Plus tax 8.10%:						0.00
Amount incl. tax						0.00

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.
- If the Bexio order is already closed (status Done, after invoice and delivery), Bexio locks the order, so the Magento order number cannot be written into



the Bexio order title. Magento still creates the order. For reference, the Bexio order number is shown in Magento on the admin order grid and on the order view page.

Orders

Search by keyword

Filters

Actions 25 records found

	ID	Purchase Point	Bexio Order No.	Purchase Date ↑	Bill-to Name	Order Synced to Bexio or Not	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
☐	000000026	Main Website Main Website Store Default Store View	AU-00154	Oct 14, 2026 6:57:29 AM	newcust fourteen	Synced	newcust fourteen	CHF 10,004.00	CHF 10,004.00	Pending	View
☐	000000025	Main Website Main Website Store Default Store View	AU-00136	Oct 14, 2026 5:16:11 AM	bbb bbb	Synced	bbb bbb	CHF 38.00	CHF 38.00	Pending	View
☐	000000024	Main Website Main Website Store Default Store View	AU-00129	Oct 14, 2026 4:10:36 AM	tester dev	Synced	tester dev	CHF 45.50	CHF 45.50	Pending	View
☐	000000023	Main Website Main Website Store Default Store View	AU-00125	Oct 7, 2026 5:39:53 AM	tester dev	Synced	tester dev	CHF 45.50	CHF 45.50	Pending	View
☐	000000022	Main Website Main Website Store Default Store View	AU-00086	Oct 7, 2026 5:38:07 AM	tester dev	Synced	tester dev	CHF 39.00	CHF 39.00	Pending	View

Fig 25.4 - Bexio Order No. on the admin order grid

#000000023 [← Back](#) [Login as Customer](#) [Cancel](#) [Send Email](#) [Hold](#) [Invoice](#) [Ship](#) [Reorder](#) [Edit](#)

Comments History

Address Information

Billing Address [Edit](#)

tester dev
fefvfwrf
dweq, Federated States Of Micronesia, 21321
United States
T: 12442414

Shipping Address [Edit](#)

tester dev
fefvfwrf
dweq, Federated States Of Micronesia, 21321
United States
T: 12442414

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using CHF.

Shipping & Handling Information

Flat Rate - Fixed CHF 5.00

Bexio Order No. AU-00125

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Erika Running Short-28-Green SKU: WSH12-28-Green	Ordered	CHF 45.00	CHF 45.00	Ordered 1	CHF 45.00	CHF 0.00	0%	CHF 0.00	CHF 45.00

Order Total

Fig 25.5 - Bexio Order No. on the order view

Bulk Action

Customer Bulk Action

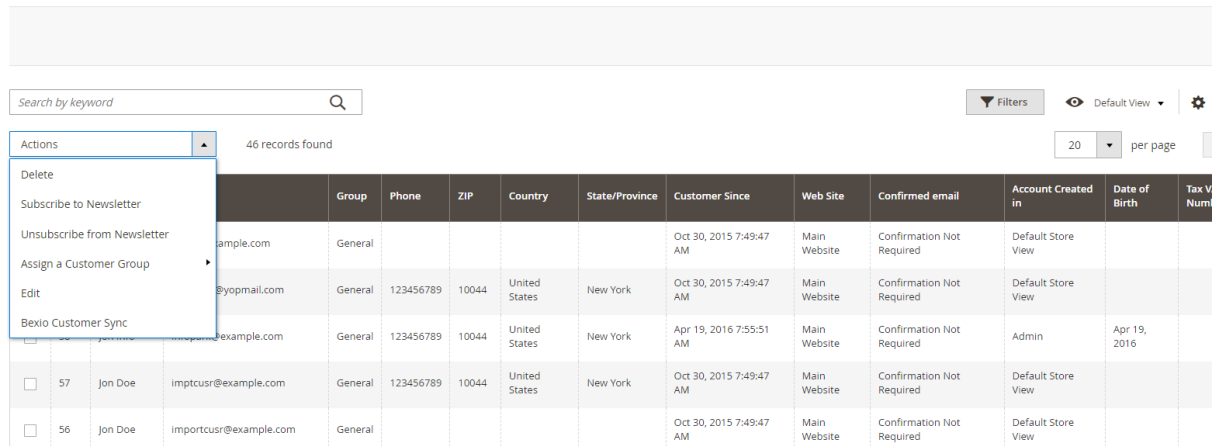


In-order to sync all existing customer to Bexio we have custom command to do the same.

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 and a 'Filters' button. 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, with columns for Actions, Group, Phone, ZIP, Country, State/Province, Customer Since, Web Site, Confirmed email, Account Created in, Date of Birth, and Tax V Num.

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

Fig 26

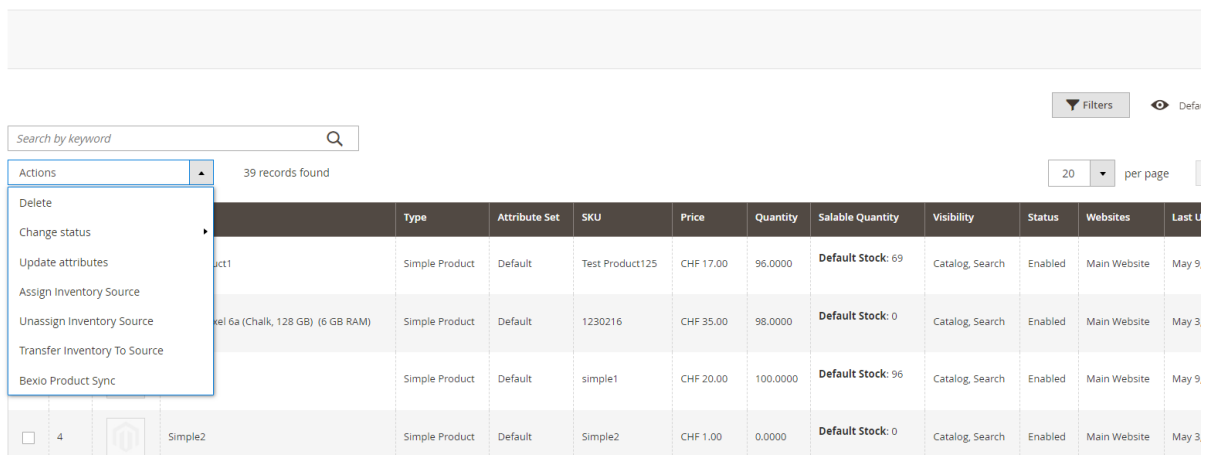
Product Bulk Action

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 Product Grid. At the top, there is a search bar and a 'Filters' button. Below the search bar, a dropdown menu is open, showing the following options: Delete, Change status, Update attributes, Assign Inventory Source, Unassign Inventory Source, Transfer Inventory To Source, and Bexio Product Sync. The grid itself displays 39 records found, with columns for Actions, Type, Attribute Set, SKU, Price, Quantity, Salable Quantity, Visibility, Status, Websites, and Last U.

Actions	Type	Attribute Set	SKU	Price	Quantity	Salable Quantity	Visibility	Status	Websites	Last U
Product1	Simple Product	Default	Test Product125	CHF 17.00	96.0000	Default Stock: 69	Catalog, Search	Enabled	Main Website	May 9
Product 6a (Chalk, 128 GB) (6 GB RAM)	Simple Product	Default	1230216	CHF 35.00	98.0000	Default Stock: 0	Catalog, Search	Enabled	Main Website	May 3
	Simple Product	Default	simple1	CHF 20.00	100.0000	Default Stock: 96	Catalog, Search	Enabled	Main Website	May 9
4 Simple2	Simple Product	Default	Simple2	CHF 1.00	0.0000	Default Stock: 0	Catalog, Search	Enabled	Main Website	May 3



Fig 26.1

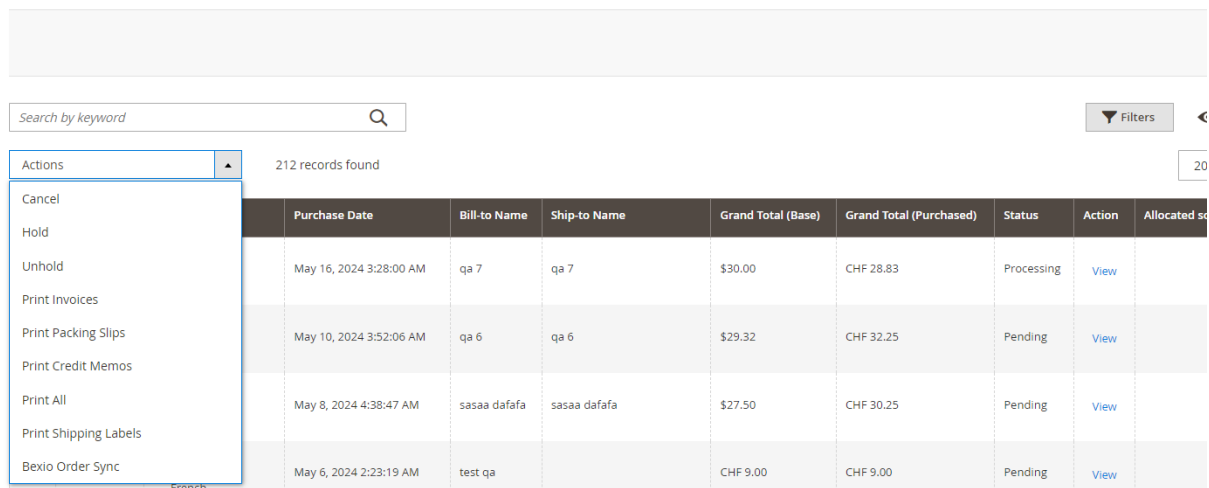
Order Bulk Action

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 Order 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 is a "Filters" button. Below the search bar, a dropdown menu is open, showing a list of actions: Cancel, Hold, Unhold, Print Invoices, Print Packing Slips, Print Credit Memos, Print All, Print Shipping Labels, and Bexio Order Sync. The table below the menu displays 212 records found. The table has columns for Purchase Date, Bill-to Name, Ship-to Name, Grand Total (Base), Grand Total (Purchased), Status, Action, and Allocated to. The first four rows of the table are visible, showing orders with various statuses and amounts.

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

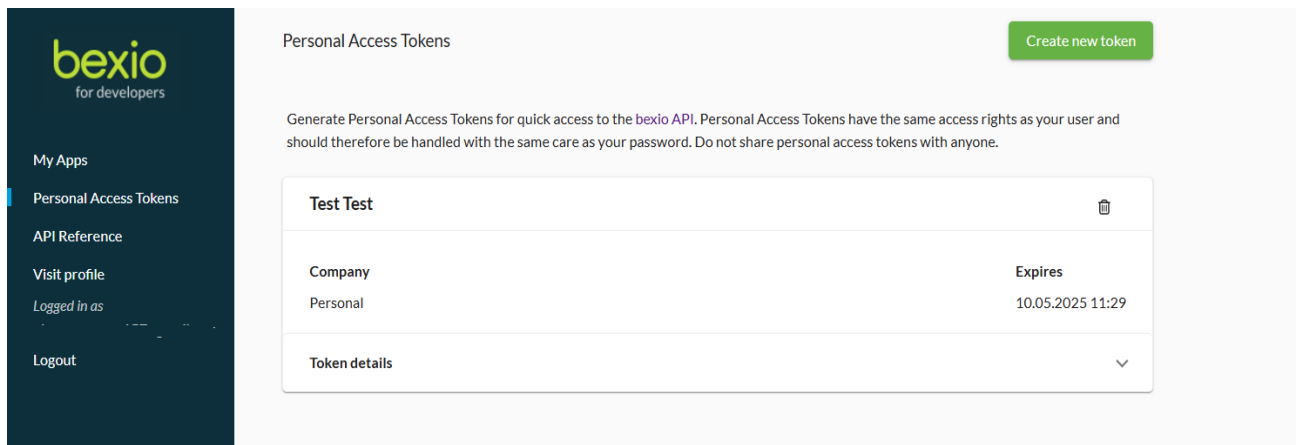


Fig 27 – Token generation

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) 2.4.5 to 2.4.9

Supported Languages

- English, German, French

Change Log / Release Notes

Version 1.0.4: October 2026

- Compatible with Magento Open Source (CE) : 2.4.5 - 2.4.9.

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