



WinMan Bridge – User Manual

Version: 1.1.0

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WinMan Bridge – A WinMan Magento Extension

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Overview

The WinMan Bridge makes it possible for products, product categories and customers to be automatically populated in Magento 2.x from a WinMan application, and for orders created in Magento 2.x to be automatically sent back to a WinMan application via the WinMan REST API.

Once installed and configured, the majority of the functionality of the WinMan Bridge runs via your Magento cron schedule.

This document covers version 1.1.0 of the WinMan Bridge.

Prerequisites

System Prerequisites

- WinMan v7.0098.27 or higher.
- WinMan REST API v1.1.0 or higher.
- Magento v2.2.1 or higher. The extension might work with versions of Magento 2.x which are older than v2.2.1, but this has not currently been tested and is not supported.
- Your Magento cron must be set up and working.

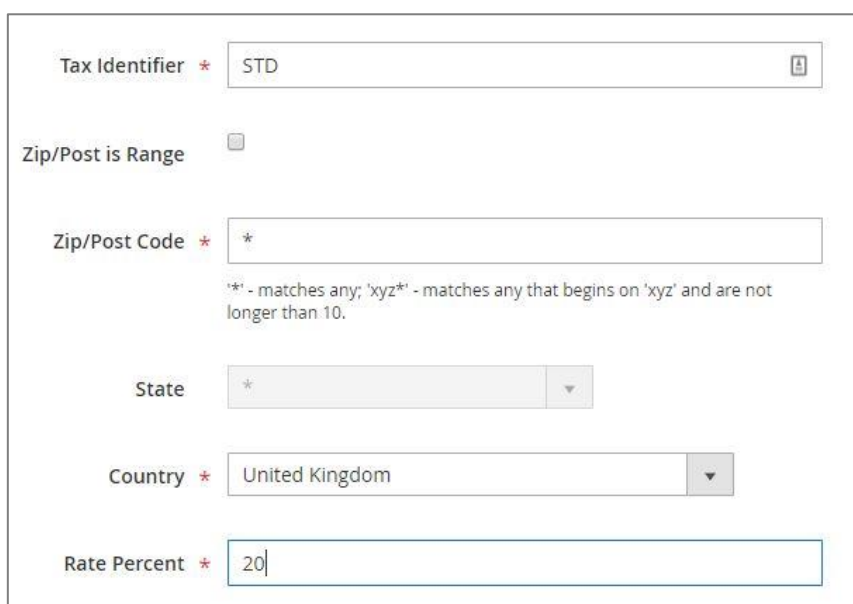
Data Prerequisites

Tax Rules, Rates and Classes

Tax Rules, Rates and Classes are not created automatically by the WinMan Bridge, and must be created manually in Magento. Your Magento *Tax Rules, Rates and Classes* should be named in a way which matches up to the *Tax Codes and Rates* in your WinMan application. The WinMan Bridge will then automatically assign the correct Magento *Tax Class* to the products that are populated.

For example, in WinMan, if you have a *Tax Code* of *STD* which has a *Tax Rate* of *20%* and is applicable in the UK, you should follow the steps below to create the necessary information in Magento:

- Create a matching *Tax Rate*. In your Admin Panel, go to *Stores -> Tax Zones and Rates -> Add New Tax Rate*, and enter the information as shown below. Remember to click *Save Rate* when done.



The screenshot shows the 'Add New Tax Rate' form in the Magento Admin Panel. The form contains the following fields and values:

- Tax Identifier ***: A text input field containing 'STD'.
- Zip/Post is Range**: A checkbox that is unchecked.
- Zip/Post Code ***: A text input field containing '*'. Below this field is a note: '**' - matches any; 'xyz*' - matches any that begins on 'xyz' and are not longer than 10.
- State**: A dropdown menu with '*' selected.
- Country ***: A dropdown menu with 'United Kingdom' selected.
- Rate Percent ***: A text input field containing '20'.

- Create a matching *Tax Rule* and product *Tax Class*. In your Admin Panel, go to *Stores -> Tax Rules -> Add New Tax Rule*. The *Name* of your new *Tax Rule* should be *STD*, and you should select *STD* from the *Tax Rate* box by clicking on it in the list box. Under *Additional Settings*, you should create a new *Tax Class* for products by clicking on the appropriate *Add New Tax Class* button. Please then ensure that your new product *Tax Class* is selected by clicking on it in the list box. Please also select all the customer *Tax Classes* by clicking on them. Once you have entered the necessary information, the first part of the page should look something like the below. Remember to click *Save Rule* when done.

Tax Rule Information

Name *

Tax Rate *

✓ STD

Default

Add New Tax Rate

▼ Additional Settings

Customer Tax Class *

✓ Retail Customer

✓ Default

✓ STD

Add New Tax Class

Product Tax Class *

Taxable Goods

✓ STD

Add New Tax Class

Priority *

Tax rates at the same priority are added, others are compounded.

You may wish to experiment with different *Tax Rules* depending on your needs. The most important part for the WinMan Bridge is that a product *Tax Class* exists in Magento for each *Tax Code* in WinMan. The names must match exactly, as these are what the WinMan Bridge looks for when syncing data. If the WinMan Bridge is unable to find a matching product *Tax Class* in Magento, the product will have no tax class assigned to it, essentially making it tax exempt.

Freight Methods

In order for Magento orders to be successfully sent back to WinMan, your Magento shipping methods must have a *Method Name* which matches up exactly to an appropriate *FreightMethodId* in WinMan.

Payment Methods

In order for Magento orders to be successfully sent back to WinMan, your Magento payment methods must have a *Title* which matches up exactly to an appropriate *CreditCardTypeId* in WinMan.

Installation

The WinMan Bridge **cannot** currently be installed via Composer and must be installed manually. Please note that **this process will take your Magento site offline until the installation is complete.** To install, follow these steps:

1. The extension will be provided in the form of a ZIP file. Extract the *app* directory from the ZIP file into your Magento root directory.
2. On your server, `cd` to your Magento root directory and run the following commands:

```
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
```

3. If you have cache enabled, you should flush your cache either via the Admin Panel (*System -> Cache Management -> Flush Magento Cache*) or by issuing the following command:

```
php bin/magento cache:flush
```

4. Once the above steps are completed, you should check that the extension is listed and enabled in your Admin Panel under *Stores -> Configuration -> Advanced -> Advanced*.

Configuration

Once you have successfully installed the WinMan Bridge, you can configure it in your Admin Panel under *Stores -> Configuration -> WinMan -> WinMan Bridge*. If your Magento site has multiple websites, you should configure the WinMan Bridge at website level by selecting the appropriate website from the *Store View* drop-down. If you have only one website, the WinMan Bridge can safely be configured at the *Default Config* level.

General

Enable Bridge?

You should set this option to *Yes* to enable the WinMan Bridge. If it is set to *No*, no information will be passed between WinMan and Magento.

API Base URL

You should set this option to reflect the base URL of your WinMan REST API. When your WinMan REST API was set up by WinMan, both a *Training* and a *Live* base URL will have been created. For more information on this, please see the WinMan REST API documentation.

Website URL

You should set this option to reflect the URL of your Magento website, exactly as it appears in the WinMan application under the *Ecommerce Websites* program. For more information on this, please see the WinMan REST API documentation.

API Access Token

You should enter a valid WinMan REST API Access Token in this box. For more information on this, please see the WinMan REST API documentation.

Enable Bridge Logging?

The WinMan Bridge is capable of producing log output for information and debugging purposes. You should set this option to *No* if you would like to disable this output. If this option is set to *Yes*, the log output will be saved in the *winman_bridge.log* file located in Magento's *var/log* directory. For production environments, it is recommended that this option is set to *No*.

Products

Fetch Products from WinMan?

If you would like to populate products in Magento from WinMan, you should set this option to *Yes*.

Fetch Product Stock Levels from WinMan?

If you would like to keep the stock levels of your products in Magento in sync with the stock levels in WinMan, you should set this option to *Yes*. If *Fetch Products from WinMan?* is set to *No*, this option will be ignored.

Fetch Product Images from WinMan?

If you would like to fetch your product images directly from WinMan, you should set this option to *Yes*. Please note that if you do set this option to *Yes*, any additional images you add to WinMan products manually through the Admin Panel will be removed from these products the next time the WinMan Bridge updates them. If *Fetch Products from WinMan?* is set to *No*, this option will be ignored.

Fetch Product Categories from WinMan?

If you would like to populate product categories in Magento from WinMan, you should set this option to *Yes*. This option will not only create and update the product categories themselves, but it will also place any relevant WinMan products into these categories. If *Fetch Products from WinMan?* is set to *No* and this option is set to *Yes*, product categories will be created but may not have products added into them.

Perform Full Product Update?

By default, the WinMan Bridge will only fetch product data from WinMan that has changed since the last time the data was fetched. If you would like to force the WinMan Bridge to fetch **all** relevant product data from WinMan, regardless of when it was last modified, you should set this option to *Yes*. If this option is set to *Yes*, the full update will occur the next time the cron job runs. Once the full update is completed, this setting will automatically revert to *No*.

If *Fetch Product Images from WinMan?* is set to *Yes*, product images will also be included in this full update. If *Fetch Products from WinMan?* is set to *No*, a full product update will not occur.

Perform Full Product Category Update?

By default, the WinMan Bridge will only fetch product category data from WinMan that has changed since the last time the data was fetched. If you would like to force the WinMan Bridge to fetch **all** relevant product category data from WinMan, regardless of when it was last modified, you should set

this option to *Yes*. If this option is set to *Yes*, the full update will occur the next time the cron job runs. Once the full update is completed, this setting will automatically revert to *No*.

Customers

Fetch Customers from WinMan?

If you would like to populate Magento customers from WinMan, you should set this option to *Yes*. The data that is populated in Magento comes from a combination of data from WinMan CRM Contacts and WinMan Customers. For more information on this, please see the WinMan REST API documentation.

Send New Customers a Welcome Email?

If you would like Magento to send a welcome email to customers who are newly created by the WinMan Bridge, you should set this option to *Yes*. If this option is set to *No*, the WinMan Bridge can still create new customers but these customers will not be notified.

Perform Full Customer Update?

By default, the WinMan Bridge will only fetch customer data from WinMan that has changed since the last time the data was fetched. If you would like to force the WinMan Bridge to fetch **all** relevant customer data from WinMan, regardless of when it was last modified, you should set this option to *Yes*. If this option is set to *Yes*, the full update will occur the next time the cron job runs. Once the full update is completed, this setting will automatically revert to *No*.

Sales Orders

Push Sales Orders back to WinMan?

If you would like orders placed within Magento to be automatically sent back to the WinMan application, you should set this option to *Yes*. If this option is set to *Yes*, orders are sent back to WinMan as soon as they are placed in Magento – you do not have to wait for the cron job to run.

Cron Schedule

The WinMan Bridge has its own cron group. To manage the settings for this cron group, go to *Stores - > Configuration -> Advanced -> System -> Cron (Scheduled Tasks) -> Cron configuration options for group: winman* in your Admin Panel.

By default, the WinMan Bridge cron job is set to run every 15 minutes.

Data Population and Export

Custom Attributes

Upon installation, the WinMan Bridge creates several custom attributes which may be populated with data from WinMan. These are as follows:

Product Attributes:

- Unit of Measure
 - This is set to the *UnitOfMeasurePrintText* from WinMan.
- Barcode
 - This is set to the *Barcode* from WinMan.
- Pack Size
 - This is set to the *PackSize* from WinMan.
- Length
 - This is set to the *Length* from WinMan.
- Width
 - This is set to the *Width* from WinMan.
- Height
 - This is set to the *Height* from WinMan.

Category Attributes:

- Category GUID
 - This is set to the *ProductCategoryGUID* from WinMan.

Customer Attributes:

- GUID
 - This is set to the *CustomerGUID* of the *Customer* in WinMan.
- Communication Allowed
 - This is set to the *AllowCommunication* field of the *CRM Contact* in WinMan.

All the above product attributes are added to the *Default Attribute Set*, grouped together in a group called *WinMan Attributes*.

Products

When products are created by the WinMan Bridge, they are added to the website for which the extension is configured, and use the *Default Attribute Set*. At present, only *Simple* products are created.

In addition to the custom attributes mentioned previously, the following standard Magento product attributes are populated by the WinMan Bridge:

- Enable Product
 - This is set to *Yes*.
- Product Name

- This is set to the *ProductDescription* from WinMan.
- SKU
 - This is set to the *ProductId* from WinMan.
- Price
 - This is set to the *WebPrice* from WinMan, unless this is 0. If it is 0, this attribute is set to the *StandardPrice* from WinMan.
- Tax Class
 - This is set to the tax class which has the same name as the *TaxCodeId* from WinMan. If no tax class exists in Magento with this name, this attribute is set to *None*. If *Taxable* is set to *False* in WinMan, the tax class is set to *None*.
- Weight
 - This is set to the *Weight* from WinMan.
- Visibility
 - This is set to *Catalog, Search*.
- Description
 - This is set to the *LongDescription* from WinMan.
- Short Description
 - This is set to the *ShortDescription* from WinMan.
- Meta Title
 - This is set to the *TitleTag* from WinMan.
- Meta Keywords
 - This is set to the *KeywordsTag* from WinMan.
- Meta Description
 - This is set to the *DescriptionTag* from WinMan.

Please note that when products are removed from the *Ecommerce Website* in WinMan, they are **not** automatically removed from Magento.

Product Images

When product images are populated by the WinMan Bridge, any images that are currently added to the product in Magento are removed and replaced by the images fetched from WinMan. The first image fetched from WinMan is set as the *base*, *small* and *thumbnail* for the product.

Product Stock Levels

When product stock levels are populated by the WinMan Bridge, the following standard Magento product attributes are populated:

- Manage Stock
 - This is set to *Yes*.
- Qty
 - This is set to the sum of the quantity in stock across all inventory sites attached to the relevant website in WinMan.
- Qty Uses Decimals
 - This is set to *Yes*.

- Stock Status
 - If *Qty* is 0, this is set to *Out of Stock*. If *Qty* is greater than 0, this is set to *In Stock*.

Product Categories

When product categories are populated by the WinMan Bridge, they are created under the root category of the website for which the extension is configured, and their hierarchy matches that in WinMan.

In addition to the custom attributes mentioned previously, the following standard Magento category attributes are populated by the WinMan Bridge:

- Enable Category
 - This is set to *Yes*.
- Category Name
 - This is set to the *ProductCategoryDescription* from WinMan.
- Category Image
 - This is set to the *CategoryImage* from WinMan, with *base*, *small* and *thumbnail* also set.
- Description
 - This is set to the *DescriptionTag* from WinMan.
- URL Key
 - This is set to a URL encoded version of the *ProductCategoryDescription* from WinMan.
- Meta Title
 - This is set to the *TitleTag* from WinMan.
- Meta Keywords
 - This is set to the *KeywordsTag* from WinMan.
- Meta Description
 - This is set to the *DescriptionTag* from WinMan.

After the above attributes are populated, the appropriate products are added into the categories.

Please note that when categories are removed from WinMan, they are **not** automatically removed from Magento. Please also note that when products are removed from categories in WinMan, they are **not** automatically removed from those categories in Magento.

Customers

When customers are created by the WinMan Bridge, they are associated to the website for which the extension is configured.

In addition to the custom attributes mentioned previously, the following standard Magento customer attributes are populated by the WinMan Bridge:

- Group

- This is set to the customer group which has the same name as the customer's *PriceListId* from WinMan. If no customer group exists in Magento with this name, the WinMan Bridge will create the group first and then set this attribute.
- Disable Automatic Group Change Based on VAT ID
 - This is set to *Yes (ticked)*.
- Prefix
 - This is set to the *Title* of the *CRM Contact* in WinMan.
- First Name
 - This is set to the *FirstName* of the *CRM Contact* in WinMan.
- Last Name
 - This is set to the *LastName* of the *CRM Contact* in WinMan.
- Email
 - This is set to the *PortalUserName* of the *CRM Contact* in WinMan.
- Tax/VAT Number
 - This is set to the *TaxNumber* of the *Customer* in WinMan.

At present, a single address is created for the customer with the following attributes populated:

- Prefix
 - This is set to the *Title* of the *CRM Contact* in WinMan.
- First Name
 - This is set to the *FirstName* of the *CRM Contact* in WinMan.
- Last Name
 - This is set to the *LastName* of the *CRM Contact* in WinMan.
- Street Address
 - This is set to the *Address* of the *Customer* in WinMan.
- City
 - This is set to the *City* of the *Customer* in WinMan.
- Country
 - This is set to the *ISO3Chars* country code of the *Customer* in WinMan.
- State/Province
 - This is set to the *Region* of the *Customer* in WinMan.
- Zip/Postal Code
 - This is set to the *PostalCode* of the *Customer* in WinMan.
- Phone Number
 - This is set to the *PhoneNumberWork* of the *CRM Contact* in WinMan.
- Default Billing Address
 - This is set to *Yes (ticked)*.
- Default Shipping Address
 - This is set to *Yes (ticked)*.

Newly created customers have their password randomly generated by Magento, and if the configuration option *Send New Customers a Welcome Email?* is set to *Yes*, they are sent a welcome email with a link to access their account. Customers which are being updated do **not** have their passwords changed.

Please note that CRM contacts which are removed from WinMan are **not** automatically removed from Magento.

Sales Orders

For orders which are sent back to WinMan by the WinMan Bridge, the following fields from the Magento order are sent to the appropriate *EcommerceWebsite* in WinMan:

- Customer GUID
- Grand Total
 - This is the grand total in the customer's currency.
- Tax Amount
 - This is the total amount of tax for the order in the customer's currency.
- Order ID
 - This is used as the *CustomerOrderNumber* in WinMan.
- Coupon / Promotional Code
- Order Currency Code
- Customer Email
- SKU (of each product purchased)
- Quantity (of each product purchased)
- Row Total (for each product purchased)
 - This the total price for the order row in the customer's currency.
- Tax Amount (for each product purchased)
 - This is the total amount of tax for the order row in the customer's currency.
- Shipping Method Name
 - This is used as the *FreightMethodId* in WinMan.
- Shipping Amount
 - This is the total for shipping in the customer's currency.
- Shipping Tax Amount
 - This is the total amount of tax for shipping in the customer's currency.
- Shipping Address First Name + Shipping Address Last Name
 - This is used as the *DeliveryName* in WinMan.
- Shipping Address Street Address
 - This is used as the *DeliveryAddress* in WinMan.
- Shipping Address Zip/Postal Code
 - This is used as the delivery address *PostalCode* in WinMan.
- Shipping Address Country Code
 - This is used as the *ISO3Chars* country code of the delivery address in WinMan.
- Payment Method Title
 - This is used as the *CreditCardTypeId* in WinMan.
- Total Paid
 - This is the total amount for the order in the customer's currency.

If the order is successfully sent to WinMan, its status in Magento is set to *Complete* and a note is added containing the WinMan Order ID. If the order is **not** successfully sent to WinMan, its status in Magento is set to *On Hold* and a note is added advising an Administrator to check the logs for more

information. Please note that the customer is **not** notified of any change of order status which is made by the WinMan Bridge.

If the Magento customer does not have a *Customer GUID* (either because the account has been created in Magento, **not** via the WinMan Bridge, or because they are a guest), the WinMan Bridge will attempt to match up the customer's email address to a *CRM Contact's PortalUserName* in WinMan (provided the appropriate *Program Profile* has been enabled in WinMan. Please see the WinMan REST API documentation for more information on this). If a match is found, the order will be placed in WinMan using this existing *CRM Contact* and associated *Customer*. If no match is found, a brand-new *CRM Contact*, *CRM Company* and *Customer* will be created in WinMan. In all cases, the WinMan Bridge sends the *Customer GUID* from WinMan back to Magento after the order has been successfully placed in WinMan.

Request Account page

The WinMan Bridge makes it possible for *CRM Contacts* to be created automatically in WinMan. A frontend page is created when the WinMan Bridge is installed which can be reached at [http\(s\)://<your_website_URL>/requestaccount](http(s)://<your_website_URL>/requestaccount). It contains a simple form for the potential customer to complete. Once all the mandatory fields are completed and the potential customer clicks the submit button, the data is automatically sent back to WinMan and *CRM Contact* and *CRM Company* is created. Within the WinMan application, this *CRM Company* can then be promoted to a full *Customer*, at which point, the WinMan Bridge will be able to automatically pick up the data again and create a Magento customer.

A success or failure message is displayed above the form to inform the potential customer whether their request was successfully sent to WinMan.