

## Getting started with ...

# Magento and Brightpearl

### 1.1

Your Magento store may not have been set up for inventory management, so there may be some things that you need to change in order for it to work with Brightpearl as the back-office.

This document describes the changes you may need to make to Magento.

More context on how an ecommerce store should be set up for correct inventory management is in the Commerce Acceleration 101 paper "Setting up Ecommerce for Inventory Management".



## 1. Decide how deeply do you want to integrate

There are a number of ways you can integrate your Magento store with Brightpearl. The more attributes (fields) you synchronize, the more complex your project will be. Consider which of the following are most important to you:

1. Inventory levels are pushed from Brightpearl to Magento
2. Orders are downloaded from Magento into Brightpearl
3. Shipments are uploaded from Brightpearl to Magento
4. New products are pushed from Brightpearl to Magento
5. Product price changes are pushed from Brightpearl to Magento
6. Other product changes are pushed from Brightpearl to Magento

*We strongly recommend that you get up and running with 1, 2 and 3 before you consider 4, 5 and 6.*

### **Option 1: Brightpearl as inventory master only (levels 1, 2, 3)**

All you need to do is ensure that similar items already exist on both systems and they have the same SKU. SKUs must always be unique, and every variant must have a SKU. For more information, have a good read of the Commerce Acceleration 101 document "Understanding SKUs".

### **Option 2: Brightpearl as full product master (levels 4, 5, 6)**

This more complex approach is to use Brightpearl to "publish" new products to your Magento store, and then use Brightpearl to subsequently manage the content of those products - attributes such as name, options, description etc. In this scenario we call Brightpearl the "product master".

In order for Brightpearl to change product attributes for an existing product on Magento, or create new products on Magento, the attributes need to be (a) of type "dropdown", and (b) linked to the equivalent in Brightpearl.

*Linking attributes is a time consuming, manual process and will need to be kept up to date as you change/add attributes in either system. Consider whether it's worth maintaining this data, or just creating the products separately on your Magento store.*

If you are absolutely certain you want Brightpearl to be the "product master", then you will likely need to make more changes to your Magento store than if you were just operating in "inventory master" mode.

If you are just operating in inventory master mode, then you'll create and edit products directly in Magento, and you don't need to worry about linking all the attributes with Brightpearl. You also have the freedom to have different values in Magento and Brightpearl; Magento attribute sets do not have to relate directly to Brightpearl product types for example. This lets you define your Magento attribute sets for the best customer experience on your site, and define Brightpearl product types for best reporting and back-office data management.

## 2. Connect your Brightpearl account to Magento

Once you've confirmed that your store is on a recent version of Magento, it's time to check if Brightpearl can connect to it. Each Magento account is connected to a separate Brightpearl sales channel; if your Magento store has multiple storefronts, they are all part of the same Magento account and sales will be assigned to one Brightpearl sales channel.

Brightpearl support team need to activate your Magento integration, in order for you to add a Magento channel.

1. From the channels menu, select "Manage channels".
2. Add a channel, and select Magento
3. Fill out the form with your Magento admin URL - this will notify our team who will activate the integration for you. We won't connect your store.

Once we've let you know the integration is installed, you should add the Magento channel. This will take you to the Magento dashboard where you can add a store. Access the Magento dashboard at any time from Setup > Integrations > Magento.

To connect your store, follow the instructions on our [Magento documentation](#) and our [YouTube Magento playlist](#).

### Connecting a staging server to your Brightpearl trial account

If you have a Magento staging / development server, you can connect that to your Brightpearl account, but it does not guarantee that you're live, production Magento store will also work with Brightpearl. There may be differences in the server setup between your development and production sites.

When you decide to go live, you will need to add a new Magento channel for your production store, since the links we have built to your development store are not guaranteed to be the same. We recommend a NEW Brightpearl account for your production Magento store.

### Integration settings

When you add a store, you'll be able to choose what gets synchronized with Magento.

#### What do you want to sync between Brightpearl and Magento?

- Product details (e.g. name, description, options)
- Product inventory
- Product pricing
- Orders

The top setting - "Product details" - activates the "product master" mode of operation.

Until your Brightpearl account has the right inventory levels (which will be after your first stock take) - ensure that product inventory sync is switched OFF.

### 3. Link product "reference data"

If you're using Brightpearl as product master, then you'll also need to link all the following information which is used for products. If you're just using Brightpearl in "inventory master" mode, you can skip this step.

#### Brightpearl

Product type  
Product option  
Product option value  
Brand  
Tax code

#### Magento

Attribute set  
Attribute (must be type = dropdown)  
Attribute value  
Attribute with name "manufacturer"  
Tax code

Start by downloading all your Magento attributes into Brightpearl from any of the setup screens for the above items. Once your attributes are downloaded into Brightpearl, you can link them up to the equivalent value in Magento.

Here's a screen shot of the Magento dashboard showing unconnected reference data:

The screenshot displays four panels from the Magento dashboard, each showing unconnected reference data:

- Option values:** 10 of 67 Option values connected. Such as "Small", or "orange". These map to Magento Attribute Values. A yellow box highlights: "The following unconnected Option values are preventing products from synchronising with Magento: Connect Green, Connect Style A, Connect Autumn/Winter." A link "Connect other Option values" is at the bottom.
- Brands:** 6 of 15 Brands connected. These map to values of the "manufacturer" attribute in Magento. Each of your Magento attribute sets needs to contain manufacturer since it's a required field in Brightpearl. A link "Connect Brands" is present.
- Product types:** 5 of 12 Product types connected. Such as "Camera", or "Shirt". These map to Magento Attribute Sets. A yellow box highlights: "The following unconnected Product types are preventing products from synchronising with Magento: Connect Furniture." A link "Connect other Product types" is at the bottom.
- Product options:** 2 of 16 Product options connected. Such as "Size", or "Color". These map to Magento Attributes. A yellow box highlights: "The following unconnected Product options are preventing products from synchronising with Magento: Connect Style, Connect Season." A link "Connect other Product options" is at the bottom.

When you add or edit these attributes in Magento, you will need to make the same changes in Brightpearl. If you're adding new attribute values (such as new brands) you need to re-download the attributes into Brightpearl and link to the new value.

## 4. Link existing Brightpearl products to Magento

If your Brightpearl account already has the same products as those in Magento, you can link them up. Select the products in Brightpearl on the product list, and choose "manage channels".

Ensure that matching products in both systems have the same SKU.

If you are using Brightpearl as "product master", then all your reference data (attributes, brands, options, tax codes etc) will also need to be linked properly otherwise Brightpearl won't be able to synchronize product updates to your Magento store. Inventory updates will still be sent, even if product details cannot be synchronized.

## 5. Import products from Magento to Brightpearl

If you've already got a Magento store, we can import your items into Brightpearl as part of a supported implementation. Please contact [magento@brightpearl.com](mailto:magento@brightpearl.com) if you'd like to discuss this.

Brightpearl has a data structure for products that's very similar to Magento, however there are some things you need to check to make sure that items can be imported, and then inventory can subsequently be managed properly.

If you're only going to use Brightpearl as the inventory master (not content master) then we can use any arbitrary value in Brightpearl where your Magento store may be missing information - such as "Other" for brand.

### Ensure all variants are "simple products"

Each item for which you track stock needs to be a separate "simple product". This means that every combination of size and color has to be a simple product, not a custom option.

If you want to display different variants for a product on one web page, you need to create a configurable product in Magento and assign the relevant simple products to it. *Brightpearl does **not** do this for you as part of the content management in "product master" mode.*

### Variant attributes should be of type "dropdown"

Products have many attributes; name, brand, description etc. Some of these attributes are used to differentiate variants within a product group; Size for example. These are variant attributes. Brand would normally be the same value for all variants in the group, and as such is not a variant attribute.

If you want to use Brightpearl as product master, then each of the Magento variant attributes need to be linked to a Brightpearl product option, which has pre-defined option values. This means that Magento needs to be set up in a similar way - with the attributes set to type "dropdown".

If you're not using Brightpearl as product master (you're managing products separately in Magento) then you don't need to worry about this.

### Maximum of four variant attributes per product group

Consider a product group "Tee shirt" with "size" and "color". There are two sizes and three colors; which gives a total of six variants. That would be six separate simple products in Magento:

- Tee shirt - Small - Red
- Tee shirt - Small - Blue
- Tee shirt - Small - Yellow
- Tee shirt - Medium - Red
- Tee shirt - Medium - Blue
- Tee shirt - Medium - Yellow

This is only two variant attributes; Size and Color. Brightpearl supports up to four variant attributes for any one product group. If you have products that have more than four variant attributes, consider breaking the product groups up so that they only have four.

Note that products are grouped in Brightpearl using the product name, which in the example above is "Tee shirt".

### **Product SKUs should be less than 32 characters**

Magento requires that every product has a SKU, so you'll be OK on that front. Brightpearl, however, only allows up to 32 characters in the SKU field, so you need to make sure that your Magento SKUs are less than 32 characters.

### **Make sure every product has a brand**

Brightpearl requires that every product is given a brand. We use the Magento attribute with code "manufacturer" for this value, so before we import your Magento items you'll need to make sure every product has a manufacturer.

If you're not using Brightpearl as product master (you're managing products separately in Magento) then you don't need to worry about this.

### **Manage a realistic number of attribute values**

Brightpearl starts to struggle when you have more than a couple of hundred option values. Typically this tends to rear its head with colors and apparel companies.

It doesn't matter whether you're using Brightpearl as product master or not, since the number of colors you are using depends on the products you currently have across your product range.

## **6. Run a stock take**

Before you go live, you need to ensure that your Brightpearl account has the right inventory levels. Do a stock take and import your stock levels into Brightpearl. [Read about how to do this on our documentation.](#)

It's important that you have added correct product cost prices before you import inventory levels. [Read more about importing cost prices.](#)

## 7. Activate the integration

Go to your Magento dashboard and click to edit the store. Activate order download, inventory sync plus any other attributes that you want to sync.

Note that inventory levels are not pushed across to Magento unless the Brightpearl on-hand value **changes**. So, nothing will happen immediately when you activate inventory sync. If you want to update your Magento store from your recent stock take (step 6), then activate the inventory sync before you import your inventory CSV. Inventory will only be updated for products that are already connected.

### Orders in progress

As soon as you activate order sync, we'll start checking your store for orders that have been created within the last 7 days. This will include any orders that are currently "in flight", which generally makes it easier to transfer between systems. If you have already processed these orders, then either set them to "cancelled" in Brightpearl, or fulfil and ship them as normal, invoice and then make any relevant inventory adjustments manually.

## Server requirements

### System version

Brightpearl connects to your Magento account using the SOAP API, and we need it to be on a recent enough version.

Your store needs to be on Magento CE 1.6.2 or above, or Enterprise 1.12.0.2 above. We support all versions of Magento Go.

### API access

Your Magento store needs to have a fully functional SOAP API, as per the Magento core API specification. If the Brightpearl servers cannot connect to your API, we cannot integrate.

### Hosting capacity

Brightpearl will be communicating with your Magento store over API every time inventory levels change (and more often if you use Brightpearl to manage other product details). This is server traffic, just like visitors browsing your website, and if you have lots of products or orders, then this API traffic from Brightpearl can be significant.

Your servers need to be configured to respond to API requests quickly and without slowing down the rest of your site. Not only do you need to have a powerful hosting package, you also need to set up the servers specifically to handle this kind of traffic.