

# User Guide




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## Description:

- a. Woo2doli is a new module that synchronizes your Woocommerce store with the Dolibarr erp / crm management software via API. The connections via API guarantee security and speed of the connection.
- b. The goal of the plugin is to transfer the orders that are generated on the e-commerce platform into dolibarr to allow management, shipping and billing.
- c. To achieve this it is necessary that the products and customers are recognized by the two platforms and this is the work that the plugin does.

Woo2Doli through heuristic functions compares the names of the products and the names of the customers residing in the two platforms and by attributing the percentage of similarity it establishes their uniqueness and correspondence.

The woo2doli plugin can encounter two different situations, one with the two platforms just installed, products to be created, no woocommerce customers and no orders. In this case, just add the products to woocommerce and the plugin will copy them to dolibarr and pair them without further action.

If, on the other hand, the plugin is installed with the two platforms already operational, which is much more likely, it is necessary to pair the products and customers already existing in the two platforms to allow dolibarr to recognize the elements present in the customer orders generated in woocommerce. Since the sales process is managed by woocommerce it is necessary to create the products in wordpress, the module will take care of transferring them to dolibarr respecting all the product settings.

Customers who register on the e-commerce site will be transferred to dolibarr as third parties / customers but we can of course also create a customer on wordpress and the module copies it to dolibarr, if a customer enters a destination other than the billing one, a contact "shipping" on the customer dolibarr in order to easily manage shipments.

All this greatly simplifies the management of sales in terms of billing and invoicing, economic reports, customer data.

## Installation

**Dolibarr:** The installation of the module is standard, it is sufficient to reach:

Settings / Modules / external modules



Impostazione Modulo/Applicazione

Applicazioni/moduli attivi: 50 / 83

If permissions on your file system allow it, you can use this tool to deploy an external module. The module will then be visible on the tab **Moduli disponibili**.

Moduli disponibili

Trova app/moduli esterni...

Trova app/moduli esterni...

Sviluppa il tuo modulo/app

To deploy/install an external module, unpack/unzip the packaged files into the server directory dedicated to external modules:  
`/var/www/html/custom`

È possibile eseguire l'upload del file .zip del modulo da qui:  Nessun file selezionato

select the file and send it. Remember to activate it

**Activate the REST API module to allow the two installations to communicate**

**Wordpress:** Reach the wordpress plugin page and click on "Add"

Select the package on your PC

Se hai un plugin in formato .zip, puoi installarlo o aggiornarlo caricandolo qui.

Nessun file selezionato

Install and activate it on the installed plugins page.

## Settings

### Connection with dolibarr

Now we have to suggest to our wordpress installation where to reach our dolibarr and provide it with the security key that encodes the data in transit, then go to the plugin settings:

**Plugin Settings**

General Customers fields Customer fields from order Orders fields Pairing utilities Copying utilities

General settings

**Dolibarr API URL**  Normally is <Dolibarr URL>/api/index.php but may be have been changed for security reasons.

**API key**  You can find it in Dolibarr user card

**Check stock**  Check dolibarr stock and update it into wordpress when the user add items to the cart

**Sync categories**  Sync product categories on product update. It will not disassociate or delete categories on Dolibarr

**Ref is SKU**  Sync product ref on Dolibarr with product SKU. Must use Leopard module on Dolibarr

**Sync product image**  Sync product image on Dolibarr

Status:  
Connection Successful (https://14.dev.semplifica.cloud/api/index.php/status; Dolibarr version:14.0.5)

Save Settings

The Dolibarr API URL field must be filled in with the Dolibarr API address on which you must merge the sales data. Generally, unless otherwise specified, it consists of the Dolibarr url address + /api/index.php

Fill the API key field with the key owned by the user woo2doli on Dolibarr.

Utente Scheda utente Autorizzazioni 217 Impostazioni grafiche Calend

**Cognome** woo2doli

**Nome**

**Login**

**Password**

**Chiave per API** fUq87aM9g1lIKcU2ppRDRHz64av4Q69N



## Warehouse stock management

The management of product stocks is carried out through two interactions: a cron that every hour checks the stocks of the products on dolibarr, reporting the changes on woocommerce but also with a further control that reads the dolibarr stocks when the product is placed in the cart. Enable inventory management on the module settings panel and in woocommerce for each product we want to control inventory enable inventory management in the inventory TAB.

## Category management

The management of the product categories is optional, if activated they are managed so that those of woocommerce DO NOT replace those, possibly different, of dolibarr but added to them.

## Management of SKU

Sometimes it is necessary that the product code is the same both on dolibarr and on woocommerce, enabling this option you get that the SKU field of the product in woocommerce represents the Ref. Of the product in dolibarr but it is necessary that the coding of the products in the settings of dolibarr is set to "LEOPARD". (free code)

N.B .: Due to the fact that dolibarr prevents the use of some characters in the Ref. field, it is necessary to pay attention to the SKU code that we set in Woocommerce. For example the character "/" will be transformed into "\_" causing problems to transfer the product via woo2doli.

## Synchronization products images

Selecting this option when registering a product, its image in wordpress will also be synchronized in dolibarr

## Customers Fields mapping:

As you know, wordpress does not manage the tax fields in the user card and these fields must be reported on the dolibarr customer card. Since there are several plugins that manage this data, we have mapped the fields of the tables concerned in order to correctly transfer them to dolibarr. Simply select the corresponding fields to be transferred from the list of fields. The image shows for example the nomenclatures of one of the most used plugins in Italy, "WooCommerce VAT number and Tax Code for Italy" N.B.: Depending on the type of database installation, if the relevant field is not filled in at least once for any user, it is not detected in the list of customer fields

### Plugin Settings

General Customers fields Customer fields from order Orders fields Pairing utilities Copying utilities

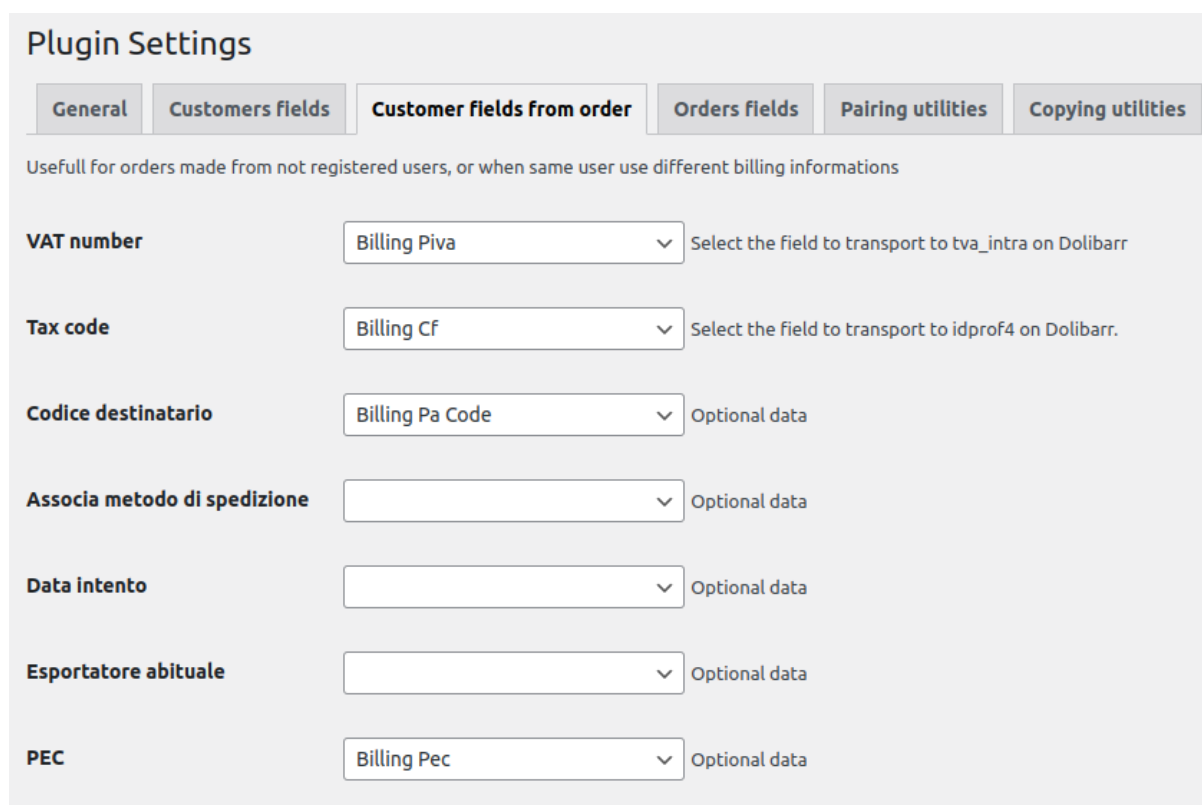
Select here user fields you want to sync on dolibarr thirdparty.

<b>VAT number</b>	Billing Piva	Select the field to transport to tva_intra on Dolibarr
<b>Tax code</b>	Billing Cf	Select the field to transport to idprof4 on Dolibarr.
<b>Codice destinatario</b>	Billing Pa Code	Optional data
<b>Associa metodo di spedizione</b>	Shipping Method	Optional data
<b>Data intento</b>		Optional data
<b>Esportatore abituale</b>		Optional data
<b>PEC</b>	Billing Pec	Optional data

## Customers fields from order

Woocommerce allows the order without user registration, this causes the apparent doubling of the tax fields "tax code", "VAT number", "PEC", and "sdi code" which instead of being registered on the customer card are instead associated to the order, hence the need to also map these fields defined in the check-out and be able to report them correctly on dolibarr even in the absence of a registered reference user.

The image shows the nomenclatures of one of the most used plugins in Italy, "WooCommerce VAT number and Tax Code for Italy"



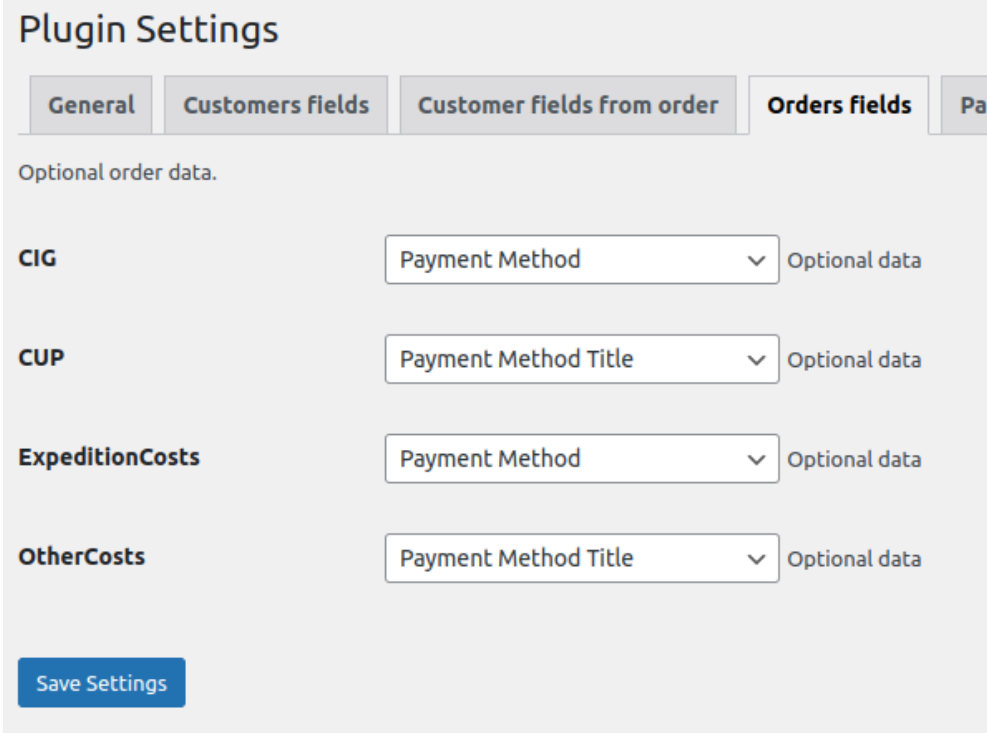
The image shows the 'Plugin Settings' interface for the 'Customer fields from order' plugin. The settings are organized into tabs: General, Customers fields, Customer fields from order (selected), Orders fields, Pairing utilities, and Copying utilities. Below the tabs, a description reads: 'Usefull for orders made from not registered users, or when same user use different billing informations'. The settings are as follows:

Field Name	Selected Value	Description
VAT number	Billing Piva	Select the field to transport to tva_intra on Dolibarr
Tax code	Billing Cf	Select the field to transport to idprof4 on Dolibarr.
Codice destinatario	Billing Pa Code	Optional data
Associa metodo di spedizione		Optional data
Data intento		Optional data
Esportatore abituale		Optional data
PEC	Billing Pec	Optional data



## Orders Fields

In this TAB, the plugin reads the extra fields present in the order in dolibarr and reports them as shown in the figure, use them if you have the corresponding fields in the drop-down list and you need to transfer some data from the order created by woocommerce



The screenshot shows the 'Plugin Settings' interface with the 'Orders fields' tab selected. The settings are organized into a table under the heading 'Optional order data.'.

Field Name	Selected Value	Label
CIG	Payment Method	Optional data
CUP	Payment Method Title	Optional data
ExpeditionCosts	Payment Method	Optional data
OtherCosts	Payment Method Title	Optional data

At the bottom left of the settings area, there is a blue button labeled 'Save Settings'.

## Pairing utilities:

Pairing (coupling between the products and the customers of the two platforms) is an operation that must be performed at the first installation of the module in the very likely case that the products on sale and their customers are already present in the two installations. It is in fact necessary that the products and customers on the two platforms match exactly. The plugin compares the product name on the two installations and provides an estimate on the reliability of the coupling, the next step is to validate the correct couplings by selecting and saving them, after which the products and customers will be coupled and there will be no possibility of error or duplication of orders.

**Connection**   **Customers tax fields**   **Orders tax fields**   **Pairing utilities**   **Copying utilities**

**Products** | Customers

This heuristic function suggest objects pairing based on label similarity. Remove unexact pairing. Click on Save Settings to confirm pairing.

Woocommerce products	Similarity	Dolibarr products	
A02 Profumo ispirato a "Hypnotic" Donna	100	A02 Profumo ispirato a "Hypnotic" Donna	X
BALSAMO LABBRA	100	BALSAMO LABBRA	X
LATTE DETERGENTE AL SALE ROSA DELL'HIMALAYA	100	LATTE DETERGENTE AL SALE ROSA DELL'HIMALAYA	X
LUCIDALABBRA	100	LUCIDALABBRA	X
Maglietta	100	Maglietta	X
Maglietta eXtralarge green	100	Maglietta eXtralarge green	X
Maglietta eXtralarge red	100	Maglietta eXtralarge red	X
Maglietta small red	100	Maglietta small red	X
MASCHERA ALL'ARGILLA E ROSMARINO	100	MASCHERA ALL'ARGILLA E ROSMARINO	X
OLIO DI ARGAN PURO	100	OLIO DI ARGAN PURO	X
Rossetto Matt 04	100	Rossetto Matt 04	X
Rossetto Matt 04 small green	100	Rossetto Matt 04 small green	X
Rossetto Matt 06	100	Rossetto Matt 06	X
SAPONE AL LATTE D'ASINA BIO	100	SAPONE AL LATTE D'ASINA BIO	X
SIERO ALL' ACIDO JALURONICO BIO	100	SIERO ALL' ACIDO JALURONICO BIO	X
Solare protezione TOTALE	100	Solare protezione TOTALE	X
testtest	100	testtest	X
var	100	var	X

**Woocommerce products:** 18  
**Dolibarr products:** 34  
**Paired products:**  
**Peak memory usage:** 7940 KB  
**Loading time:** 0 seconds  
**Comparison time:** 0 seconds

**Pair**   **Reset paired**

## Copying utilities:

The plugin also has a tool that copies products and customers both from woocommerce to dolibarr and from dolibarr to woocommerce. At present the tool does not copy product images.

The screenshot shows the 'Copying utilities' tab in a settings menu. At the top, there are tabs for 'Connection', 'Customers tax fields', 'Orders tax fields', 'Pairing utilities', and 'Copying utilities'. Below the tabs, there are links for 'Products' and 'Customers'. A text box explains that the function can copy objects in both directions and that no objects are currently paired. There are two columns of product lists: 'From Wordpress to Dolibarr' and 'From Dolibarr to Wordpress'. Each column has a 'select all' or 'none' link and a list of products with checkboxes. A 'Copy' button is located at the bottom left of the interface.

From Wordpress to Dolibarr	From Dolibarr to Wordpress
<input type="checkbox"/> A02 Profumo ispirato a "Hypnotic" Donna	<input type="checkbox"/> A02 Profumo ispirato a "Hypnotic" Donna
<input type="checkbox"/> BALSAMO LABBRA	<input type="checkbox"/> BALSAMO LABBRA
<input type="checkbox"/> LATTE DETERGENTE AL SALE ROSA DELL'HIMALAYA	<input type="checkbox"/> LATTE DETERGENTE AL SALE ROSA DELL'HIMALAYA
<input type="checkbox"/> LUCIDALABBRA	<input type="checkbox"/> LUCIDALABBRA
<input type="checkbox"/> Maglietta	<input type="checkbox"/> Maglietta
<input type="checkbox"/> Maglietta eXtralarge green	<input type="checkbox"/> Maglietta eXtralarge green
<input type="checkbox"/> Maglietta eXtralarge red	<input type="checkbox"/> Maglietta eXtralarge red

After the pairing operation, the plugin checks all the products residing on the two NOT paired platforms and shows a list of them. To copy a product from one platform to another, simply select and save it, as well as being copied, the product will also be coupled.



## Management of variable products

Both woocommerce and dolibarr allow the creation of variable products, this makes it possible to manage this type of article by transferring it from one platform to another. The substantial difference is that while on woocommerce each derivative product has its own price assigned on dolibarr, the price of a derivative product is given by an absolute or percentage difference with the price of the base product. This peculiarity makes it necessary to set the price of the base product on woocommerce to 0, otherwise this will be added to the price of the derivative product on Dolibarr.

## Compatibility with other modules and plugins

The woo2doli plugin is compatible with the Dolibarr multicompany module

The woo2doli plugin is compatible with the most used language translator on woocommerce, WPML. (multilingual wordpress)

Once the coupling operations between products and customers already existing in the platforms have been carried out, the functioning of the module is completely automatic, every product that is created on wordpress will be copied to dolibarr and every customer who makes a registration on wordpress will be transferred to dolibarr, of course the orders collected by woocommerce will also be transferred to dolibarr.

In the event of a malfunction with the failure to transfer the order to Dolibarr, the plugin notifies the commerce admin via an email and a notice on the order page on Woocommerce.

