User Guide

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Introduction

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Description: Woo2doli is a new module that synchronizes your Woocommerce store with the Dolibarr erp / crm management software via API.

Connections via API guarantee connection security and speed.

The goal of the plugin is to bring the orders that are generated on the e-commerce platform into dolibarr to allow management, shipping and billing.

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 products and customers establishing 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 on woocommerce and the plugin will copy them on dolibarr.

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 order created by woocommerce.

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 the images of the products.

The ZIP package consists of a module to be installed in Dolibarr (create the woo2doli user to connect to wordpress) and the plugin to be installed on WordPress.

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.

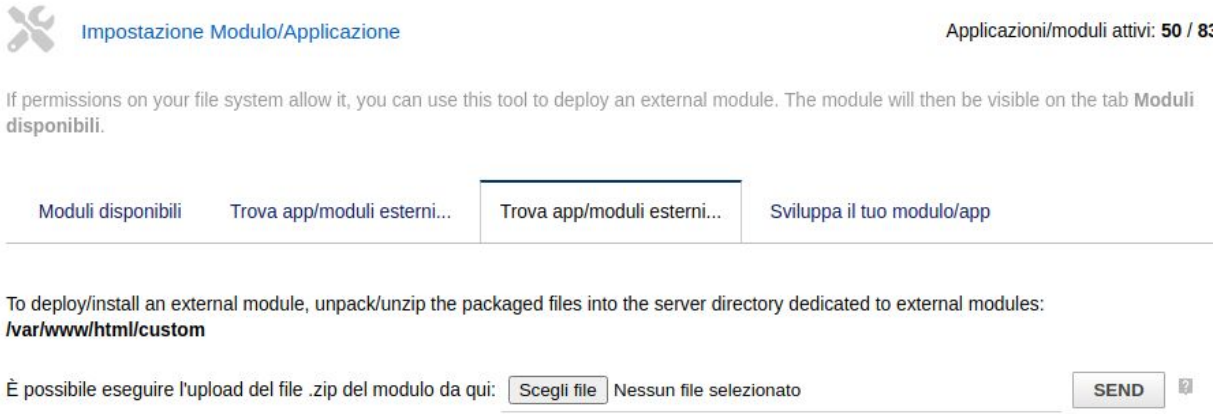
Customers who register on the e-commerce site will be transferred to dolibarr as third parties / customers but we can of course also create a customer on wordpress and the module copies it to dolibarr, if a customer enters a destination other than the billing one, a contact "shipping" on the customer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

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

The woo2doli plugin is compatible with the Dolibarr multicompany module

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

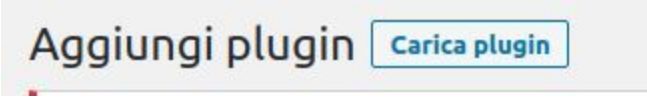
Settings / Modules / external modules



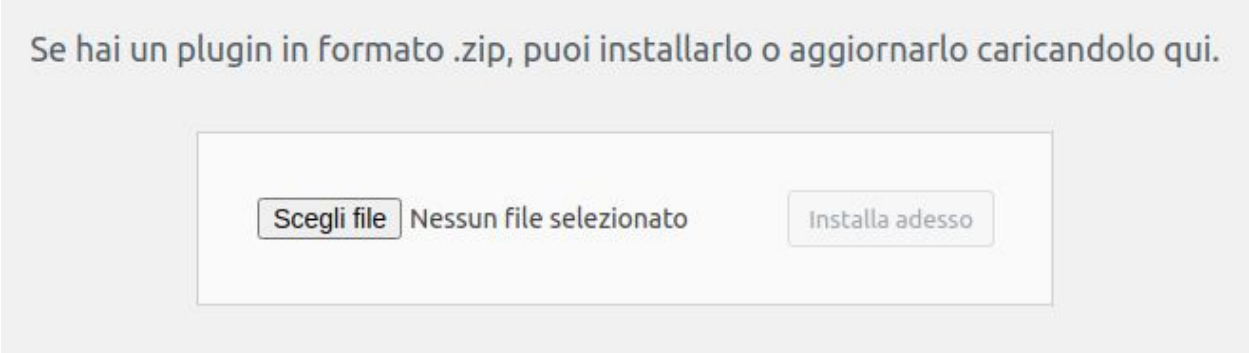
select the file and send it. Remember to activate it

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

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



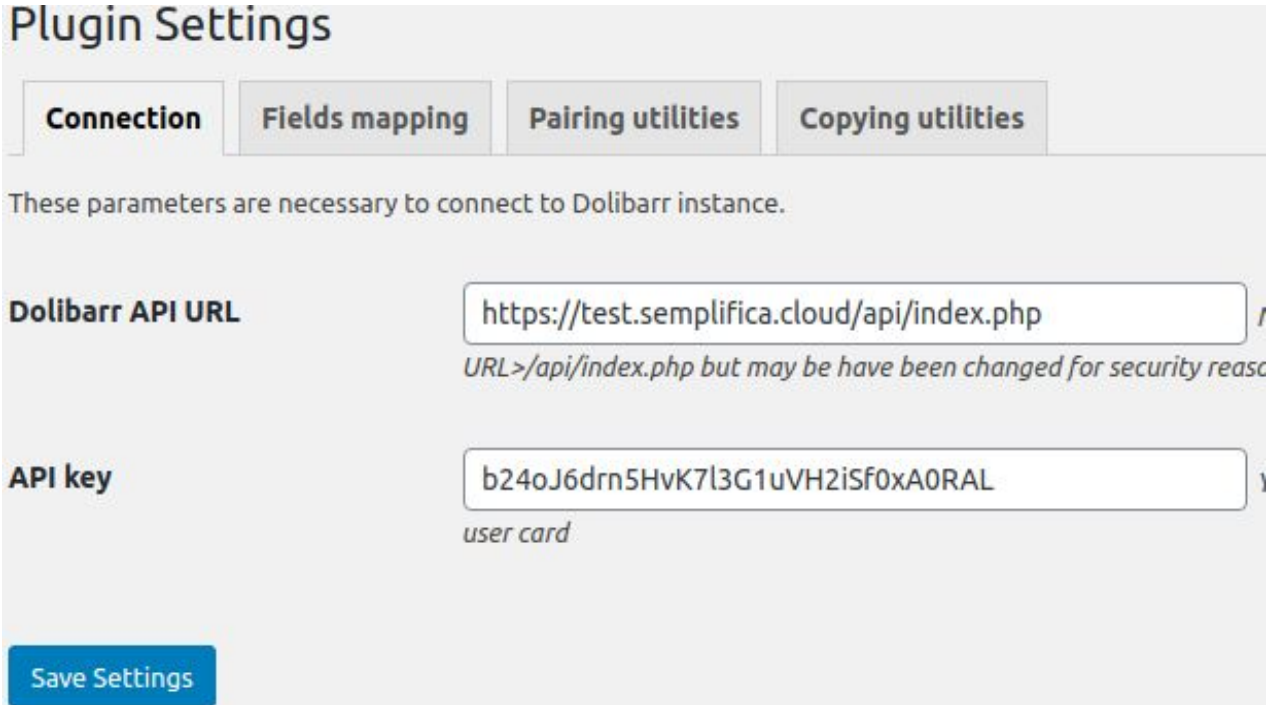
Select the package on your PC



Install and activate it on the installed plugins page.

Settings and connection with dolibarr

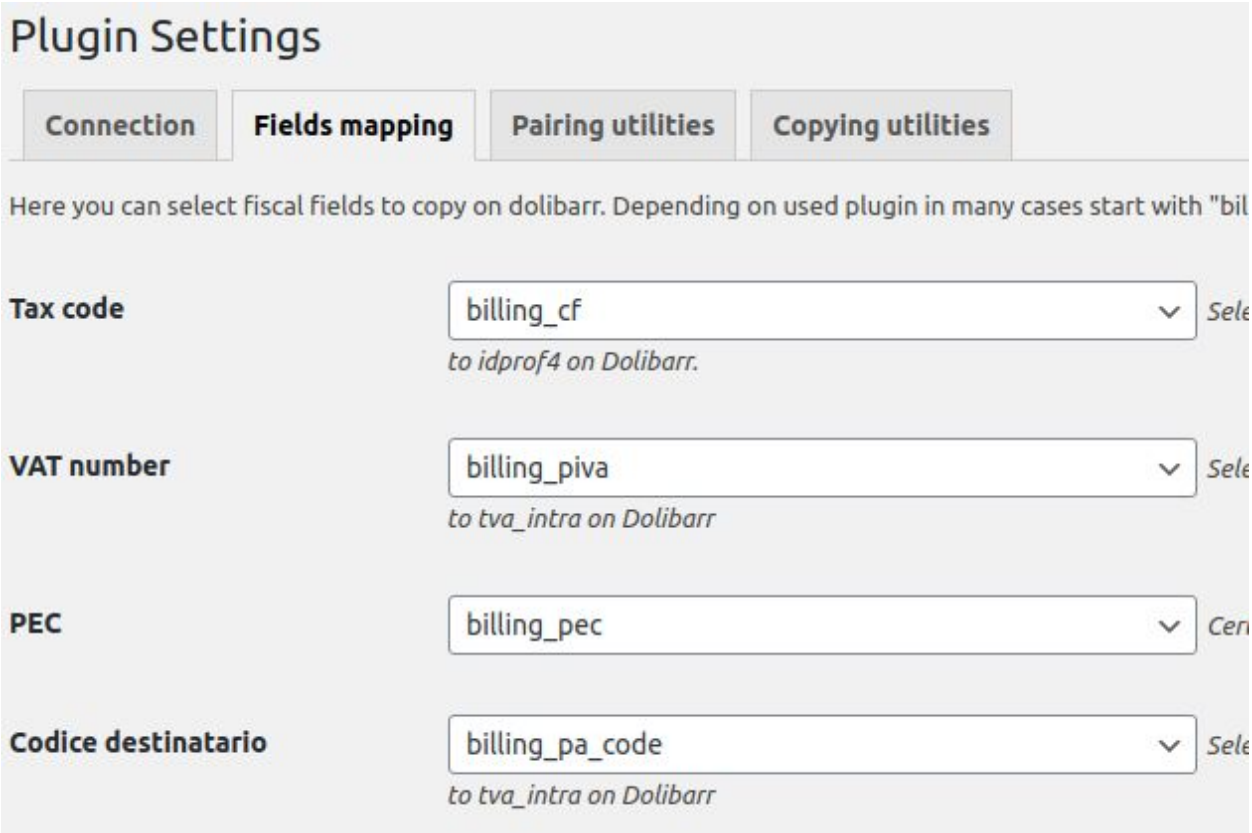
Now we have to suggest to our wordpress installation where to reach our dolibarr and provide it with the security key that encodes the data in transit, then go to the plugin settings:



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 in the DOLAPIKEY field with the key owned by the user woo2doli on Dolibarr.

Customers Fields mapping:



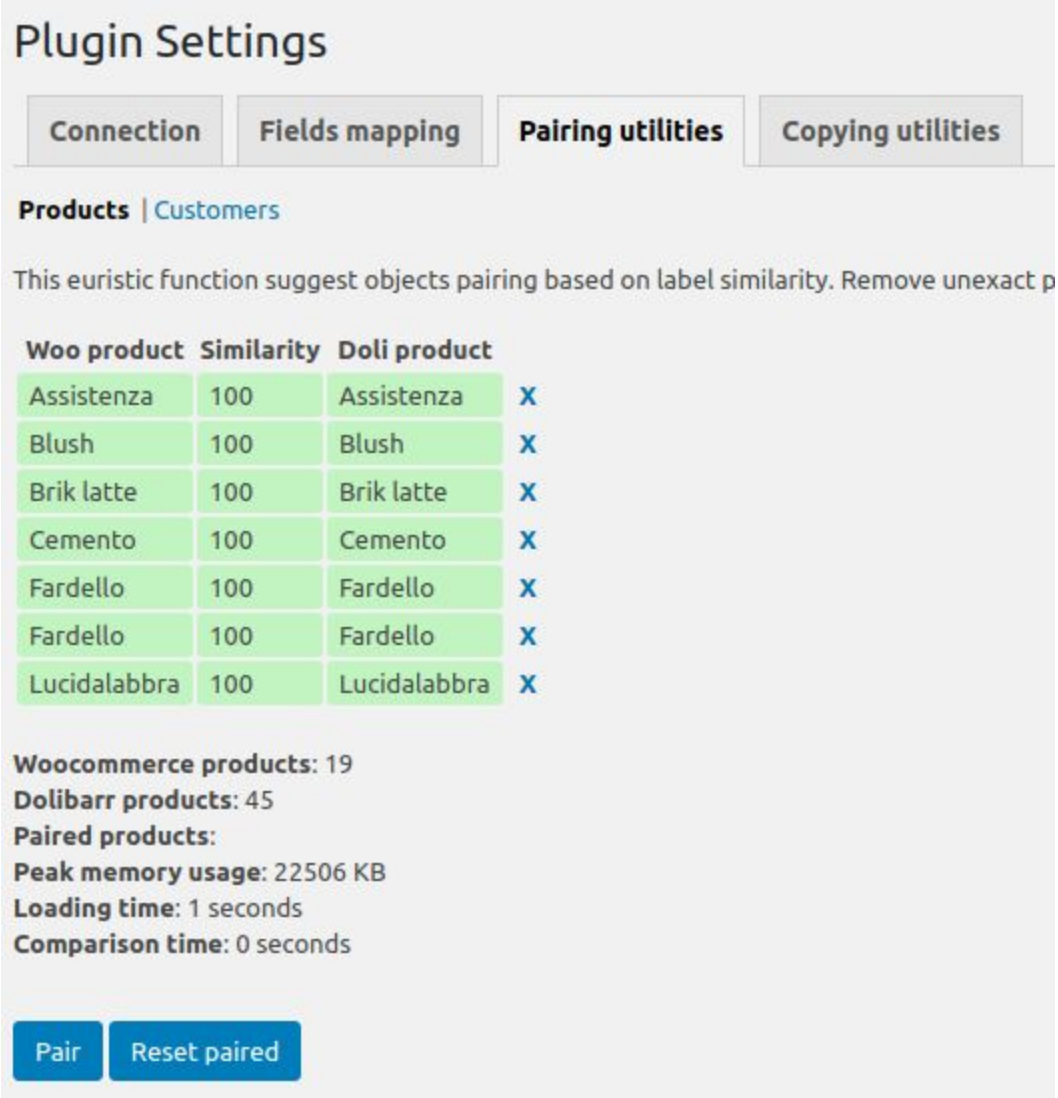
As you know, wordpress does not manage the tax fields in the user card and these fields must be reported on the dolibarr customer card. Since there are several plugins that manage this data, we have mapped the fields of the tables concerned in order to correctly transfer them to dolibarr. Simply select 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"

Orders Fields mapping:

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.

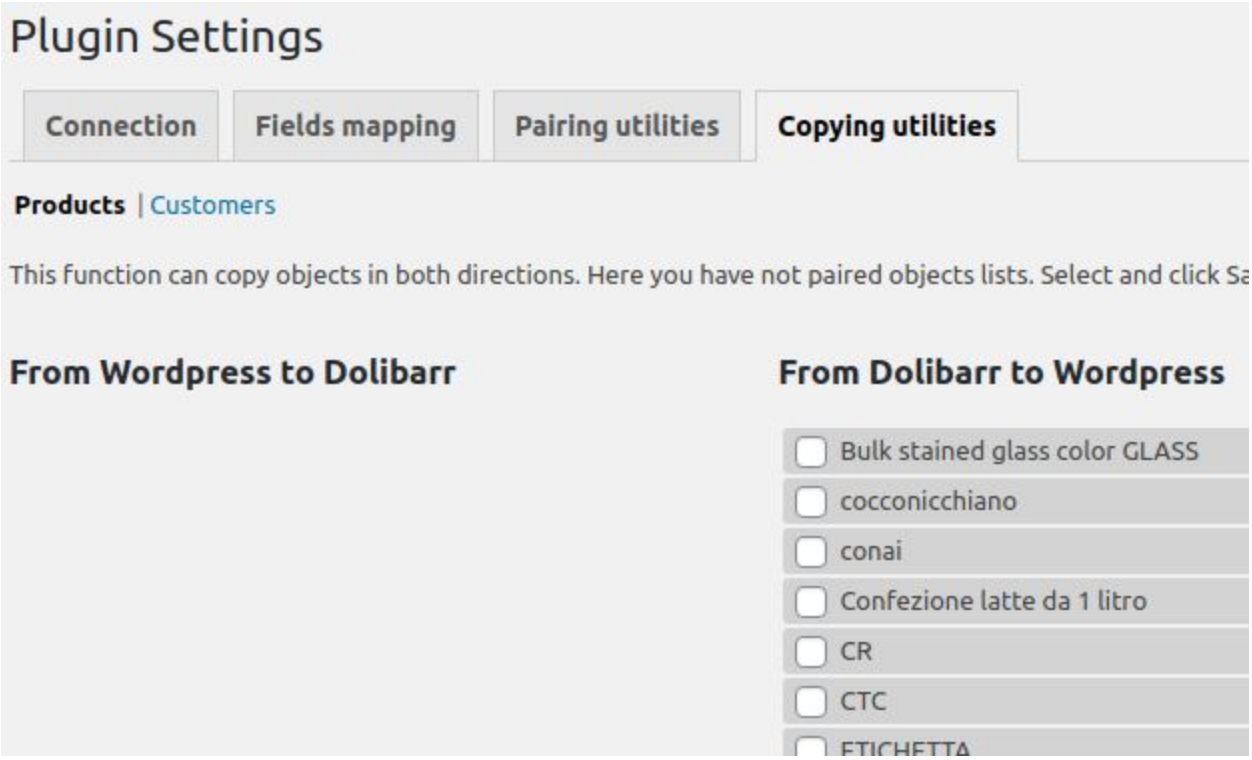
The image shows the nomenclatures of one of the most used plugins in Italy, "WooCommerce VAT number and Tax Code for Italy"

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.

Copying utilities:



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.

Working:

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.