magmodules



Best practices

Moneybird Integration for Magento 2

Choose the route before you go live, not after

Book orders as is the one setting that is expensive to change your mind about. Each invoice remembers the route it was booked under, so switching leaves you with two kinds of invoice in Moneybird — and a credit note always follows its original.

That is not a bug to work around; it is the only safe behaviour. But it does mean the decision is worth five minutes up front:

- **Magento already issues your invoices** — numbering, layout, the email — then use **external sales invoice**. Moneybird books the revenue and stays out of the way.
- **You want Moneybird to be the invoicing system** — its numbering, its templates, its reminders — then use **sales invoice**, and turn Magento's invoice email off so your customer does not get two.

If you are not sure, external is the safer half of the choice: it leaves your numbering alone.

Run Import Info after every change in Moneybird

The ledger accounts and tax rates in the dropdowns are a local copy, taken when you last pressed **Import Info**. A ledger account your bookkeeper added yesterday is not there yet, and a rate they deleted still is.

Make it a habit after any bookkeeping change. It is a read-only operation and costs nothing.

Map every tax rule, and treat the fallbacks as a safety net

The four fallbacks under **Advanced** exist for the rule you forgot, not as a mapping strategy. A shop that relies on them books everything at one rate, which is fine until the first EU order or the first zero-rated line.

Map the rules under **Accounting > Configuration > Tax Rate Mapping**, then set the fallbacks so an unmapped rule lands somewhere sensible rather than on your administration's default.

Watch the first day, then stop watching

Check **Accounting > Data > Invoices** after the first few orders. What you are looking for is not "did it work" — the status column says that — but whether the lines landed on the ledger accounts you expected. A mapping mistake is invisible in the status and obvious in Moneybird.

After that, the thing worth a weekly glance is rows in error. Those do not resolve themselves: a rejected payload stops retrying on purpose, so nobody is quietly burning API calls, but nobody is fixing it either.

Keep the queue moving on its own

Leave synchronization on the default fifteen minutes unless you have a reason. Sending invoices immediately sounds better than it is: an order that is edited right after being invoiced would reach Moneybird twice in two states.

Before you reconnect, know which account you are using

Reconnecting with a different Moneybird account is the one action that can point a working shop at the wrong books. The module clears a selected administration the new account cannot reach, and it will not book into an administration it cannot see — but an account that reaches *several* administrations, including the old one, will connect happily and let you pick the wrong one.

Read the line under the Connect button afterwards. It names the administration, with its id, for exactly this reason.

Do not use one Moneybird administration for two shops

Two Magento installations posting into one administration will eventually collide on an invoice reference, and the second one stops. If both shops genuinely bill from the same company, give them separate number ranges in Magento first.

Need More Help?

Documentation:

- All Help Articles - Complete documentation overview

Support:

- Contact Support - Get help from our team

For a complete overview of features and configuration options, see the Moneybird Integration extension on magmodules.eu

All articles for Moneybird Integration

Installation

1	Installation using Composer (recommended)
2	Installation using the Adobe Marketplace
3	Install through FTP and SSH

Configuration

1	Configuration
2	Quickstart

Troubleshooting

1	Troubleshooting

Other

1	Ledger Accounts
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Grids

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Background

1	**Best practices (current)**
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