magmodules



Configuration

Moneybird Integration for Magento 2

Stores > Configuration > Magmodules > Moneybird

General

Setting	What it does
Enabled	Turns the whole integration on. Off by default.
Synchronization	How often the cron job sends queued invoices. Every fifteen minutes by default.

Connection

Moneybird account — the Connect button, and the line telling you which administration you are connected to. Read that line before you trust anything else on this page: it is the only thing that says which set of books your invoices are about to land in.

Administration — which administration to post into. Filled in automatically when your Moneybird account reaches only one. With several you choose, and nothing is preselected. The id is shown next to the name because two administrations of the same company are routinely named the same, and picking the wrong one is not visible afterwards.

Reconnecting with an account that no longer reaches the selected administration clears the selection rather than leaving it pointing at books you cannot see.

Synchronization

Book orders as — the choice that shapes everything else.

External sales invoice: Magento numbers and sends the invoice, Moneybird books the revenue. Your invoice number is what Moneybird shows as the reference.

Sales invoice: Moneybird issues the invoice — its own number, its own PDF, optionally its own email. Your number travels as the reference only, so the two systems disagree about what the invoice is called.

The route is recorded on each invoice when it is booked and never re-read afterwards. Changing this affects new invoices only; existing ones keep their route, and so does any credit note for them.

Workflow ID (sales invoice only) — the Moneybird workflow that decides payment terms and invoice template. Leave empty for your administration's default.

Let Moneybird send the invoice (sales invoice only) — emails the invoice to the customer from Moneybird. Your customer receives it twice if Magento also sends one.

Source label (external sales invoice only) — shown in Moneybird next to the booking so it is clear where it came from. Defaults to "Magento".

Settings

The ledger account each kind of line books to: **Product**, **Shipping**, **Adjustment** and **Extra fee**. Payment fees from Mollie, Buckaroo, Sisow, Amasty and Fooman go to Extra fee; anything else the module does not recognise goes to Adjustment, because booking an unknown line as revenue overstates turnover.

The dropdowns are filled by **Import Info**. Empty means you have not run it yet.

Advanced

Invoice description and **Credit memo description** — the text on the booking. The placeholders `{invoice_number}`, `{creditmemo_number}` and `{order_number}` are replaced.

Payment term (days) — used when an invoice carries no due date of its own.

Tax fallbacks — four rates, for lines your tax-rule mapping does not cover:

Fallback	When it applies
With Tax	a line with VAT whose tax rule is not mapped
No Tax	a zero-VAT line shipping within your own country
EU No Tax	a zero-VAT line shipping to another EU country — reverse charge
No EU No Tax	a zero-VAT line shipping outside the EU

The EU one is decided first, before "zero VAT" can catch it. That order matters: booking a reverse-charged supply as plain zero-rated leaves your ICP declaration short.

Tax rate mapping

Accounting > Configuration > Tax Rate Mapping maps each Magento tax rule to a Moneybird tax rate. What travels on the invoice line is the rate's id, so a rate renamed in Moneybird keeps working and a rate deleted there does not.

An unmapped rule falls through to the fallbacks above. A line with no rate at all is sent without one, and Moneybird applies your administration's default — safe, but not a mapping.

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

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2	Quickstart

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1	Troubleshooting

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