magmodules




# Quickstart

Moneybird Integration for Magento 2

Getting orders into Moneybird takes five steps. The whole thing hinges on one decision, so read the second step before you click anything.

## 1. Connect

In Moneybird, go to **Instellingen > Koppelingen > Externe applicaties** and press **API token aanmaken**. Moneybird shows the token once, at creation — copy it then, because you cannot read it back. It gives read and write access to the whole administration, so treat it like a password.

In Magento, go to **Stores > Configuration > Magmodules > Moneybird > Connection**, paste it into **API token** and press **Save Config**. Then press **Check Credentials**: that verifies the token and reads which administrations it reaches.

If the token reaches exactly one administration, it is selected for you. With several, pick one under **Administration** and save again. Nothing is chosen for you there on purpose: posting invoices into the wrong set of books is not a mistake a default should be able to make.

## 2. Decide how orders should be booked

Under **Synchronization**, **Book orders as**:

**External sales invoice** (the default) — Magento numbers and sends the invoice; Moneybird only books the revenue. Choose this when Magento is your invoicing system.

**Sales invoice** — Moneybird issues the invoice: it assigns the number from its own sequence, renders the PDF, and can email it. Your Magento number travels along as the reference. Choose this when Moneybird should be the invoicing system.

This is not a preference you can flip back and forth without consequence. Each invoice remembers the route it was booked under, so changing the setting affects new invoices only. An invoice already in Moneybird stays where it is — and so does its credit note, which follows the original.

## 3. Import your Moneybird data

Press **Import Info**. This fetches your ledger accounts and your tax rates, so the next step has something to choose from. Run it again whenever your bookkeeper adds a ledger account or a rate.

## 4. Map tax rates and ledger accounts

Under **Settings**, pick the ledger account for products, shipping, payment fees and corrections.

Under **Accounting > Configuration > Tax Rate Mapping**, map each Magento tax rule to a Moneybird tax rate. Under **Advanced**, set the four fallbacks: with tax, without tax, EU without tax (reverse charge), and outside the EU.

Anything you leave unmapped is left out of the invoice, and Moneybird applies your administration's own default. That is safe but probably not what you want — so map them.

## 5. Turn it on

Set **Enabled** to Yes under **General**. Invoices are queued as they are created and sent by cron every fifteen minutes by default.

Watch the first few under **Accounting > Data > Invoices**. A row that failed says why in its own column, so you do not have to go looking in a log file.

## 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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|---|---|
| 1 | Configuration |
| **2** | **Quickstart (current)** |

## Troubleshooting

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|---|---|
| 1 | Troubleshooting |

## Other

| | |
|---|---|
| 1 | Ledger Accounts |
| 2 | Accounting Tab on an Order |
| 3 | Synchronization Routes |

## Grids

| | |
|---|---|
| 1 | Credit Memos Grid |
| 2 | Invoices Grid |
| 3 | Tax Rate Mapping |

## Background

| | |
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| 1 | Best practices |
| 2 | CLI Commands |

