Synchronization Routes

Moneybird Integration for Magento 2

The Moneybird Integration can book a sale two ways, and this is the one setting worth understanding before you switch the module on. Either Magento stays your invoicing system and Moneybird only records the revenue, or Moneybird issues the invoice itself — with its own number, its own PDF and its own mail. This page explains what each route does, what it means for your numbering and your customers, and why changing the setting later does not move what is already booked.

Location: Stores → Configuration → Magmodules → Moneybird → Synchronization → Book orders as

External sales invoice (the default)

Magento numbered the invoice, rendered it and sent it. Moneybird books the revenue against a document that already exists.

- Your Magento invoice number is the number in Moneybird.
- Moneybird does not issue a document, does not renumber anything and does not email the customer.
- The booking carries a source label and a link back to the order in your admin, so a bookkeeper can see where it came from.

Choose this when Magento — or your ERP — is the system that invoices your customers. It is the default because it cannot surprise anyone: nothing is numbered twice and nothing is sent twice.

Sales invoice

Moneybird issues the invoice. It assigns the number from its own sequence, renders the PDF, and can email it to the customer. Your Magento number travels along as the **reference**, so you can still find the booking by it.

- Moneybird's number and your number are two different things. Code and people that treat them as one find the invoice by neither.
- A **workflow** can be attached, which is how Moneybird decides its layout, payment terms and reminders. This is the only route that accepts one — sending a workflow on the external route is refused.
- **Send invoice** decides whether Moneybird also mails it. Leave it off if Magento already sends an invoice email, or your customer gets two.

Choose this when Moneybird should be your invoicing system: when the PDF, the numbering and the reminders are supposed to come from there.

The route is recorded per document

Every invoice and credit memo stores the route it was booked under, at the moment it enters the queue.

That means changing the setting affects new documents only. An invoice already in Moneybird stays on the resource it was booked on — and so does its credit note, which follows the original.

This is not a limitation to work around. The two routes are different resources in Moneybird: a booking looked up on the wrong one either does not exist, or — if an id happens to exist on both — is a different record entirely. Re-routing an existing document would mean touching somebody else's booking.

If you do switch, expect a period where both kinds exist side by side. That is normal, and each document tells you which one it is.

What is the same on both routes

- The lines: products, shipping, payment fees and corrections, each with its tax rate and ledger account.
- The contact: the customer is pushed to Moneybird before the invoice names it.
- Credit memos: a separate document with negative amounts, on the route that was current when it was created.
- The queue, the statuses and the retries.

Which to pick

	External sales invoice	Sales invoice
Who numbers the invoice	Magento	Moneybird
Who sends it to the customer	Magento	Moneybird, if you let it
PDF layout from a workflow	No	Yes
Magento number visible in Moneybird	As the number	As the reference

If you are not sure, take the default. Moving from external to sales invoice later is a setting change; what is already booked simply stays as it is.

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

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