

Magento 2 PunchOut & ERP Integration

Installation and User Guide for Magento 2 PunchOut & ERP Integration

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Installation

- **Installation via app/code:** Upload the content of the module to your root folder. This will not overwrite the existing Magento folder or files, only the new contents will be added. After the successful upload of the package, run below commands on Magento 2 root directory.

```
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
```

- **Installation via Composer:** Please follow the guide provided in the below link to complete the installation via composer.

<https://docs.scommerce-mage.com/magento-2-extensions/installation-via-composer/installation-via-composer>

Configuration Settings for PunchOut Integration

Go to **Admin > Stores > Configuration > Scommerce Configuration > Punchout**

General Settings

- **Enabled** - Select "Yes" or "No" to enable or disable the module.
- **License Key** - Please add the license for the extension which is provided in the order confirmation email. Please note license keys are site URL specific. If you require license keys for dev/staging sites then please email us at support@sccommerce-mage.com.

General Settings



Enabled
[store view] Yes

This setting will be used to enable or disable module

License Key
[website] puaLjxMUaHFA

This setting will be used to verify your license key for the give domain
N.B. License keys are domain specific so for your testing or staging sites please email us at core@sccommerce-mage.com

Order Creation Settings

- **Payment Method** - Select the payment method to be used for punchout orders from the dropdown.
- **Delivery Method** - Select the shipping method to be used for punchout orders from the dropdown.
- **Order Status** - Select the order status to be assigned to punchout orders upon creation.

Order Creation Settings



Payment Method
[store view] Check / Money order

Select the payment method to be used for punchout orders.

Delivery Method
[store view] [flatrate] Fixed

Select the shipping method to be used for punchout orders.

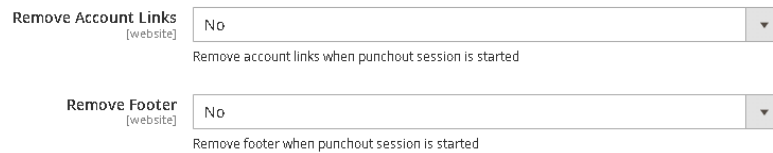
Order Status
[store view] Pending

Select the status to be assigned to punchout orders upon creation.

Catalog Settings

- **Remove Account Links** - Set "Yes" to remove account links when punchout session is started
- **Remove Footer** - Set "Yes" to remove footer when punchout session is started

Catalog Settings

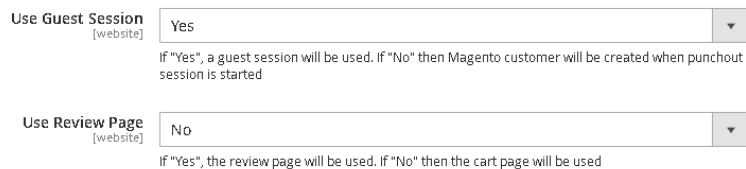


The screenshot shows two configuration options for Catalog Settings. The first is 'Remove Account Links [website]' with a dropdown menu set to 'No' and a description: 'Remove account links when punchout session is started'. The second is 'Remove Footer [website]' with a dropdown menu set to 'No' and a description: 'Remove footer when punchout session is started'.

Punchout Session Settings

- **Use Guest Session** - Set "Yes" to create a guest session when punchout session is start and Set "No" to create a new Magento customer when punchout session is started
- **Use Review Page** - Set "Yes" to use the review page and "No" to use the cart page.

Punchout Session Settings



The screenshot shows two configuration options for Punchout Session Settings. The first is 'Use Guest Session [website]' with a dropdown menu set to 'Yes' and a description: 'If "Yes", a guest session will be used. If "No" then Magento customer will be created when punchout session is started'. The second is 'Use Review Page [website]' with a dropdown menu set to 'No' and a description: 'If "Yes", the review page will be used. If "No" then the cart page will be used'.

UBL Configuration

- **Seller ID** - Add the seller ID/Peppol network ID which will be used in SellersItemIdentification
- **Seller ID Scheme**- Select the Seller Id scheme in Peppol network that gets used in SellersItemIdentification
- **Seller Name**- Add the Seller Name used in SellersItemIdentification. If blank Store name from General configuration will be used.
- **Additional Attributes**- Select additional attributes needs to be sent as a part of LineItem as AdditionalItemProperty

Seller ID
[website]

2131231

Seller Id. Peppol network ID which will be used in SellersItemIdentification

Seller ID Scheme
[website]

No Scheme
GLN
NO:ORGNR
SE:ORGNR
AP

Seller Id scheme in Peppol network used in SellersItemIdentification

Seller Name
[website]

Seller Name used in SellersItemIdentification. If blank Store name from General configuration will be used

Additional Attributes
[website]

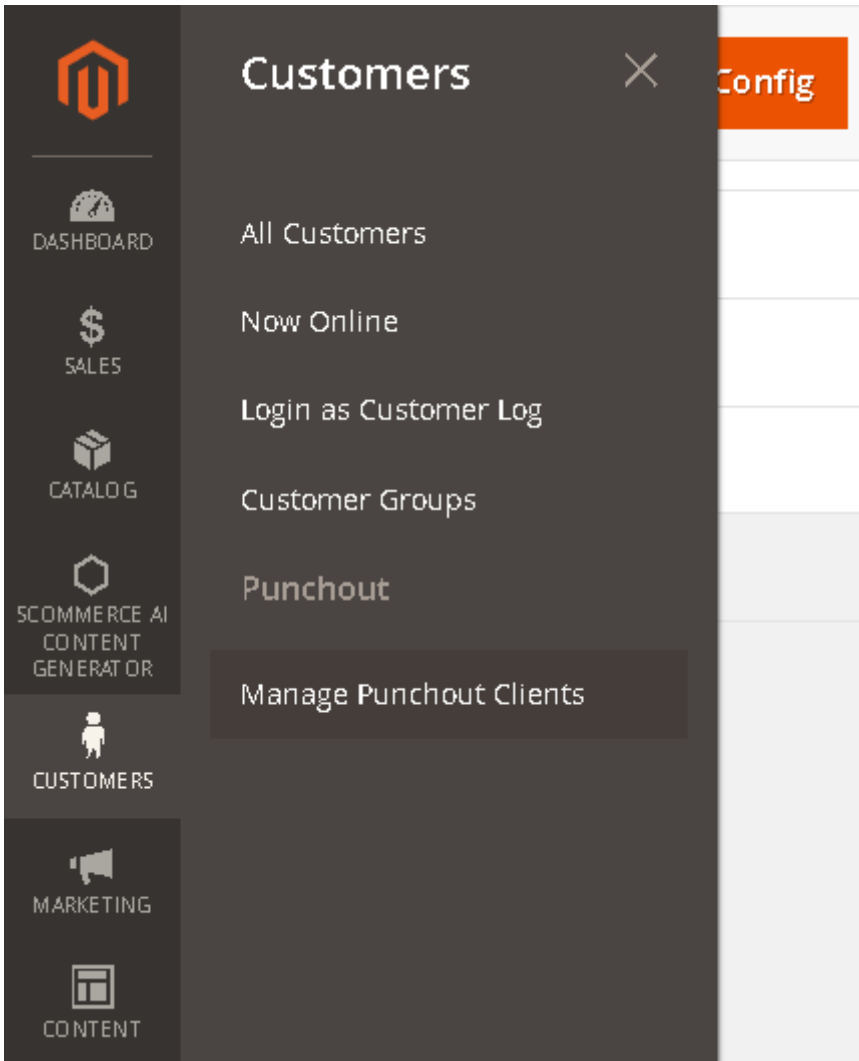
Please select
(old_id)
(required_options)
(has_options)
(created_at)
(updated_at)
(url_path)
(links_exist)
Active From (custom_design_from)
Active To (custom_design_to)

Select additional attributes needs to be sent as a part of Lineltem as AdditionalItemProperty

Managing PunchOut Clients

This is the most critical part of the setup. Each corporate client you wish to integrate with must be configured as a "PunchOut Client."

1. Go to **Admin>Customers>Punchout>Manage Punchout Clients**



2. Click **"Add New Punchout Client"** to configure a new connection.

Manage Punchout Clients 🔍 🔔 👤 support-1474

[Add New Punchout Client](#)

Search by keyword

1 records found Filters | Default View | Columns

20 per page 1 of 1

ID	ERP Identifier	Customer Group	Website	Is Active	Created At	Updated At	Action
1	Unit4	General	Main Website	Yes	2025-06-27 15:19:29	2025-07-01 12:19:32	Select

3. Fill in the following fields:

- **General Information**
 - **ERP Identifier:** The unique identifier provided by the client's ERP system. This is often referred to as the `From Identity` or `Sender Identity` in cXML.
 - **Shared Secret:** The password or secret key used for authentication, provided by your client. This must be an exact match.
 - **Customer Group:** This is the key to personalizing the experience. Select the Magento customer group that this client's users should be assigned to upon logging in via PunchOut. This controls the catalog and pricing they see.

- **Website:** Select Website
- **Is Active:** Set to "Yes" to activate the connection for this specific client.
- **UBL Information**
 - **Scheme ID:-** Select the Scheme ID
 - **Endpoint ID:-** Add the Endpoint ID

General Information

ERP Identifier *

Shared Secret *

Customer Group *

Website *

Is Active

UBL Information

Scheme ID

Endpoint ID

4. Click "**Save Config.**"

Setting Up Catalogs and Pricing

The extension leverages Magento's native customer group functionality to deliver a personalized experience.

1. **Create a Customer Group:** Before configuring a PunchOut client, navigate to **Customers > Customer Groups** and create a new group for them (e.g., "PunchOut - Global Office Inc.").
2. **Assign Custom Pricing:** Use **Marketing > Catalog Price Rules** to create rules that apply specific discounts or fixed prices for products and assign the rule to the customer group you just created.
3. **Restrict Catalog (Optional):** If you need to show only specific categories to a client, you may need to use native Magento functionality or a third-party category permissions module to restrict access for the designated customer group.

Testing the Integration

Our extension adheres strictly to industry standards, allowing you to validate your configuration using independent, third-party testing tools. We recommend using the **PunchOut Commerce cXML Order Tester**.

Step-by-Step Testing Guide:

1. **Get Your PunchOut URL:** Your Magento PunchOut URL is typically your store's base URL followed by `/scpunchout/create/session/`. For example: `https://yourstore.com/scpunchout/create/session`
2. **Open the Testing Tool:** Navigate to `https://punchoutcommerce.com/tools/cxml-order-tester`.
3. **Configure the Tester:**
 - **PunchOut Login URL:** Enter your Magento PunchOut URL from Step 1.
 - **cXML Payload:** The tool provides a template. You must edit the `Identity` and `SharedSecret` values in the XML to **exactly match** the credentials you configured for your PunchOut Client in the Magento admin.
 - **UBL Payload:** The tool provides a template. You must edit the `Username`, `password` and `Endpoint ID` values in the XML to **exactly match** the credentials you configured for your PunchOut Client in the Magento admin.
4. **Initiate the Session:** Click the "Start Session" button on the tester website to test CXL and "Start UBL Session" to test the UBL2.1
5. **Shop in Magento:** You should be redirected to your Magento storefront and automatically logged in as a member of the mapped customer group. Browse the site and verify that you see the correct products and contract pricing. Add one or more items to your basket.
6. **Transfer the Cart:** Once you have items in your basket, click the "**Transfer to ERP**" button.
7. **Verify the Response:** You will be redirected back to the PunchOut Commerce testing tool. It will now display the **cXML response** sent from your Magento store. Carefully inspect this XML to confirm that the correct SKUs, quantities, and prices are present. A successful test confirms your configuration is working correctly. You can validate the UBL output at:- <https://ecosio.com/en/peppol-and-xml-document-validator/>

Handling Purchase Orders (End-to-End Workflow)

The PunchOut process is typically two-phased.

- **Phase 1 (Shopping):** The buyer transfers their cart from Magento to their ERP for internal approval. This is what you validated during testing.



Search entire store here...

What's New Women Men Gear Training New Sale

Home > Gear > Bags

Bags

Introducing the Ultimate Collection of Bags: Elevate Your Style and Convenience Welcome to our carefully curated collection of bag affordability. Our extensive range of bags offers something for everyone, whether you're looking for a chic handbag, a spacious to Discover the perfect bag to complement your outfit and lifestyle, with options suitable for work, travel, leisure, and everything in b sourcing the finest materials, we bring you an unparalleled selection of bags that are as practical as they are fashionable. From tim designed to withstand the test of time and seamlessly integrate into your daily routine. Our commitment to quality means that ea durability and longevity. With a focus on versatility and practicality, our bags are thoughtfully designed with ample storage space, s perfect companions for any occasion. Whether you're running errands, heading to the office, or embarking on a weekend getaway effortlessly carry your essentials. Browse our extensive collection of bags and discover the perfect accessory to elevate your style d and sizes, there's something for every taste and need. Shop with confidence, knowing that each bag is backed by our commitment your accessory game and add the perfect finishing touch to any outfit with our collection of bags. Experience the perfect blend of : selection. Shop now and find the ideal bag to accompany you on all your adventures.

3 Items in Cart Cart Subtotal : £128.40 Excl. Tax: £107.00

Transfer to ERP

PayPal

Pay Later

Wayfarer Messenger Bag Test
£54.00
Excl. Tax: £45.00
Qty: 1



Your order has been successfully submitted to the procurement system.

Thank you for your order. You will be redirected back to your procurement system shortly.

Continue Shopping

Punchout Tester - Testing Data

Cart Transfer cXML

Purchase Order cXML

← → ↻ qa2.scommerce-mage.co.uk/scpunchout/order/success/?eps=1&scpq=1761741234

Jet2holidays TalkMind_NewProject Creditsafe MSB details Support Email GTM and GA [SCOM-1182] Comp... CKB M

test_username

Password:

test_password

Replace Credentials

```
<?xml version="1.0" encoding="UTF-8"?>
<cXML payloadID="po-20251029-1473@erp.unit4.com" timestamp="2025-10-29T12:33:55+00:00" version="1.2.014">
  <Header>
    <From>
      <Credential domain="DUNS">
        <Identity>123456789</Identity>
      </Credential>
    </From>
    <To>
      <Credential domain="DUNS">
        <Identity>987654321</Identity>
      </Credential>
    </To>
    <Sender>
      <Credential domain="NetworkID">
        <Identity>test username</Identity>
      </Credential>
    </Sender>
  </Header>
</cXML>
```

Create Purchase Order

- **Phase 2 (Ordering):** After the cart is approved, the client's ERP system sends a formal **Purchase Order (PO)** back to Magento as a new cXML message.

← → ↻ qa2.scommerce-mage.co.uk/scpunchout/order/success/?eps=1&scpq=1761741234

Jet2holidays TalkMind_NewProject Creditsafe MSB details Support Email GTM and GA [SCOM-1182] Comp... CKB MSB

Your order has been successfully submitted to the procurement system.

Thank you for your order. You will be redirected back to your procurement system shortly.

[Continue Shopping](#)

Punchout Tester - Testing Data

[Cart Transfer cXML](#) [Purchase Order cXML](#)

The screenshot shows a web browser window with the URL `qa2.scommerce-mage.co.uk/scpunchout/order/success/?eps=1&scpq=1761741234`. The browser's address bar and tabs are visible. Below the browser window, there is a code block containing XML data:

```
<From>
  <Credential domain="DUNS">
    <Identity>123456789</Identity>
  </Credential>
</From>
<To>
  <Credential domain="DUNS">
    <Identity>987654321</Identity>
  </Credential>
</To>
<Sender>
  <Credential domain="NetworkID">
    <Identity>test username</Identity>
  </Credential>
</Sender>
</cXML>
```

Below the XML code, there is a blue button with a white pencil icon and the text "Create Purchase Order".

Below the button, there is a section titled "Response Results:" containing a code block with XML data:

```
<?xml version="1.0" encoding="UTF-8"?>
<cXML payloadID="response-69020a36e231c" timestamp="2025-10-29T12:36:06Z" version="1.2.014">
  <Response>
    <Status code="200" text="OK">
      <Description>Purchase order processed successfully</Description>
    </Status>
    <PurchaseOrderReference orderID="000000791"/>
  </Response>
</cXML>
```

Our extension can receive this incoming Purchase Order and automatically create a corresponding sales order in your Magento system, enabling a fully automated, end-to-end workflow. The specific endpoint URL for receiving POs (`/scpunchout/order/`) should be provided to your client's IT team.

Troubleshooting Common Issues

- **Authentication Failed / Invalid Credentials:** This almost always means the **Identity** or **Shared Secret** in your PunchOut Client configuration does not match what is being sent by the ERP or testing tool. They are case-sensitive and must be an exact match.
- **User Sees Wrong Products or Pricing:** Verify that the PunchOut Client is mapped to the correct **Magento Customer Group**. Then, check the Catalog Price Rules and any category permissions assigned to that specific group.
- **Cart Transfer Fails or Returns an Error:** Check the Magento exception and system logs for detailed error messages. Common causes include products being out of stock or disabled.
- **Connection Timeouts:** Ensure your server's firewall allows incoming POST requests from your client's ERP system IP addresses or from the testing tools you are using.

If you have a question related to this extension please check out our [FAQ Section](#) first. If you can't find the answer you are looking for then please contact support@sccommerce-mage.com.

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