

Embedded ERP for Magento

Integration and User Guidelines

Version 2.6 & 2.1

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1. Getting started

1.1 Main functions

Customer orders

- Product availability dynamic display, also available for configurable products (availability displayed as per selection)
- Estimate delivery dates display(Chatel law) depending on stock status, current pending supply orders with their estimate delivery dates
- Real time order progress follow up and delivery date estimation
- Automatic product booking for new orders if stock is available

Supply needs

- Supply needs list is update online and in real time as per your stock status, with customers pending orders, minimum stock product alerts and pending suppliers orders
- A delivery deadline is associated to each supply need for a better purchasing management
- Most used/interesting suppliers display
- Easy and fast supplier order creation
- Supply needs validation when supplier order is placed

Stock Management

- Dedicated new product sheet for stock and purchasing management
- Pending orders, booked orders and stock status display
- Product movement records display (records of stock ingoing and outgoing products depending on customers orders, suppliers order and return material)
- Customer's pending orders display (awaiting for a product)
- Supplier pending order display
- Pricing tool (as per buying prices, margin ...)
- Associated suppliers management, you can compare easily each suppliers pricing
- Default supply needs timing management, estimate date further supply date

Supplier order

- Suppliers orders creation based on supply needs
- Automatic product pricing capture as per records
- Direct supplier PDF order form e-mailing option
- supply needs date forecast , supply needs updates, estimation of pending order dispatch dates management
- absorption costing calculation as per transport costs and others taxes costs
- Several taxes rates management
- Order progress follow up per status
- Delivery management, stock automatic update, product booking for pending orders, stock movement creation

Order preparation

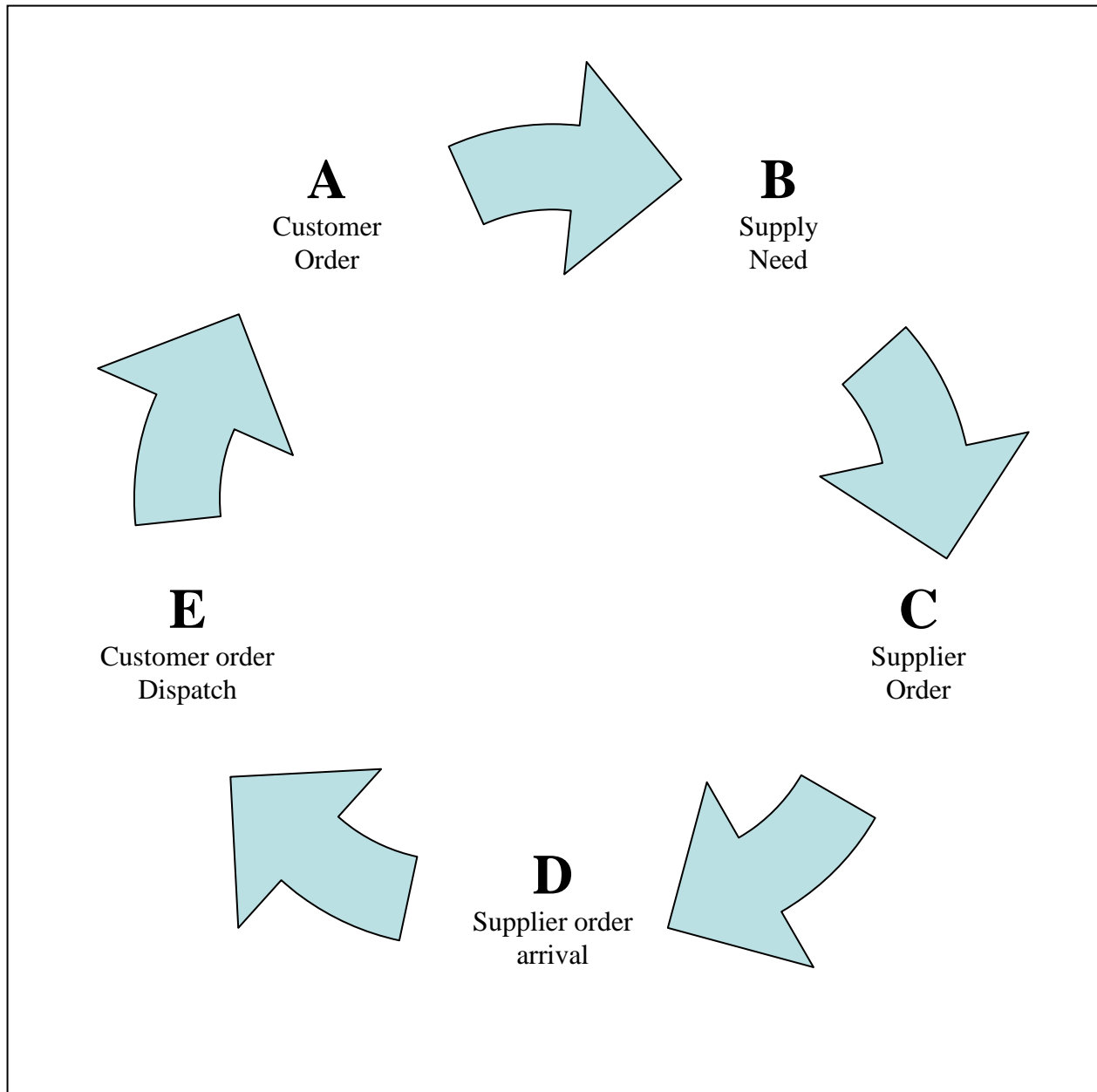
- Check in real time orders that can be dispatched and pending orders awaiting stock consolidation
- Select orders that can be processed during the day, partial shipment possible
- Mass invoices, delivery notes, and customer notify creation
- Picking list printing (printing of a document showing all the products required to prepare orders)
- Export of orders towards forwarders software's(TNT, Colissimo) to print labels
- Tracking numbers import from forwarders software's
- Automatic calculation of chargeable weights (several calculation methods available)

Miscellaneous

- Margins display par customer order and product
- Multi languages and multi site management
- Compatible with invoices, delivery notes and emails print rewrite feature
- Manufacturer data base management
- Contacts data base management (for suppliers or manufacturers)

1.2 General operating

In this part, we will show you the extension's global operating and its philosophy.



- **A : Customer order**
 - Available stock Products for this order are automatically booked.
 - If case of any missing products, they are automatically added to supply needs list

- **B : Supply needs**
 - Supply need list is filled based on non available products for orders and by minimum stock alerts
 - Supply need list is updated in real time
 - Each need (product required) is associated with a deadline depending on estimated delivery dates in order to manage effectively buying and manage priorities

- **C : Supplier order**
 - o You can place a supplier order depending on your supply needs (by making a filter on the supplier for example) or simply by selecting required products
 - o You can type (or not) buying price and forward direct your order by email (with attached PDF file) to your supplier
 - o When a order is pending, corresponding supply needs are highlighted in green, estimated delivery dates are updated (customer can only if you activate the option check online in real time this updated estimate delivery date)

- **D : Supplier order arrival**
 - o Deliveries allow you to update automatically stock
 - o Arrived available products automatically update customer's pending orders (they can be now dispatched or not)
 - o Supply needs are automatically updated
 - o Real buying costs are generated (gross price + absorptions costs), product and supplier are linked showing last price and buying date for this supplier

- **E : Order dispatch**
 - o Check the list of orders ready for dispatch and orders with still missing products
 - o Select the orders to be processed for the day (full or partial shipment) depending their supply needs status, payment status...etc
 - o Print your « picking list » (list of products required to prepare orders)
 - o Mass creation of invoices and delivery note with a simple click
 - o System generates automatically chargeable weigh of the boxes (several methods available with also the possibility of putting your own parameters)
 - o Export orders list towards forwarder's software and print your label
 - o Import in Magento shipments tracking numbers from your forwarder's software
 - o Mass notification of customer to advise their shipment dispatch and the option of goods follow up directly online

1.3 Solution advantages

Purchasing, stock and logistics management extensions aimed at offering the same functions as an ERP with a easy and perfect integration in Magento.

Our extensions are for owners of E-commerce sites running with Magento who are willing to get integrated to Magento a stock, purchasing and logistics management without being obliged to use a costly non adapted ERP.

External ERP are very expensive and also cost a lot of time.

Our extensions are able to support up to 20 000 products and 500 orders per day (average).

Therefore you will be able to get the following benefits:

- **Perfect integration** in Magento's back office : You can access all administrative functions of your website within the same interface
- Easy updates without streaming issues between your ERP and your e-commerce site:

Magento and our extensions use the same database: you will make sure that **all data is always updated.**

- **Roll-out saving** : It will be an internet solution without deployment issue with users. All your data and functions will be available wherever you are
- **Reduce your formation costs** : New systems with new interfaces will not be required
- **Personalization**: Our customer's diversity enable use to install advanced parameters to match your company's procedures. Our extensions also supports "Magento surcharge" which will enable you to create your own plugins that can increase or modify your extensions functions.
- **Evolution** : Our extensions are all the time being updated, with Magento's update, for specific bugs or new functions

2. Setting / Configuration

2.1 Setting

2.1.1 Preliminary

It is compulsory to run tests on an integration server BEFORE installing extensions in production. Maison Du Logiciel can not be in charge for any data lost.

Before installing the extension, we advise to disable the CRON.

Please also take the necessary time to configure properly different items in system > configuration

2.1.2 Files copy

Files copy is made from archive file that you download from our website www.maisondulogiciel.com to your server.

2.1.2.1 Code files

- Create the folder MDN in your server in the directory app/code/local/
- Copy folders from app/code/local/MDN in the directory app/code/local of your server

2.1.2.2 Template files for back office

These files allows the modification or addition of new items to the interface of your back office

They shall be copied in the theme folder used by Magento

If you already created a specific theme, it has to be copied there.

If not, kindly follow the procedure of Magento theme creation for back office.

2.1.2.3 Theme creation for back office

This procedure is to be done only if you do not have any specific theme for your back office.

The theme that we will create is named mdn_theme

- Create the folder app/design/adminhtml/default/mdn_theme
- Open the file app/code/core/mage/adminhtml/etc/config.xml and edit following node (you have to replace default by mdn_theme)

<p>Before :</p> <pre><stores> <admin> <!-- default admin design package and theme --> <design> <package> <name>default</name> </package> <theme> <default>default</default> </theme> </design> </admin> </stores></pre>	<p>After :</p> <pre><stores> <admin> <!-- default admin design package and theme --> <design> <package> <name>default</name> </package> <theme> <default>mdn_theme</default> </theme> </design> </admin> </stores></pre>
---	--

- Save your settings and refresh Magento's cache (System menu > Cache settings)

2.1.2.4 Theme copy for back office

- Copy files app/design/adminhtml/default/mdn/layout/* in the folder app/design/adminhtml/default/[votre_theme]/layout/*
- Copy files app/design/adminhtml/default/mdn/template/* in the folder app/design/adminhtml/default/[votre_theme]/ template /*

2.1.2.5 Javascript files copy

They are mainly use for the front.

- Copy folder js/MDN in your server /js directory.

2.1.2.6 Picture copy

- Copier folder skin/images/* contacts in skin/admin/images/ of your server

2.1.2.7 Translation files copy

- Copy folders app/locale/ in the directory app/locale of your server

2.1.2.8 Extensions notification files

These files will allow Magento to integrate the extensions.

- Copy files from folder app/etc/modules/* in the directory app/etc/modules/ of your server.

2.1.3 Installation checking

If you are using a version with « flat catalog » activated, please update the flat catalog in System Menu > Cache settings

Once all files are copied, please follow hereunder steps to make sure it is well installed:

- Refresh cache (System menu > Cache settings): If you get any error message at this stage, it means that there are some problems with the installation. Please note down the error and use our online forum (<http://www.maisondulogiciel.com/forum>) to get assistance.
- Disconnect and reconnect yourself from Magento's back office.
- Check extensions installation in Magento: Therefore, go to System > configuration > advanced > disable module output. You should be able to see the following new elements (if it does not appear, kindly check again if you copied files app/etc/modules/* and that you refresh cache):
 - o MDN_BackgroundTask
 - o MDN_OrderPreparation
 - o MDN_Purchase
- After that, please go to « Order » menu > order preparation » and « Purchasing > products « to make sure that it is displayed correctly. If not, it means that your theme adminhtml is not well displayed.

Once all steps are valid, extensions are well installed.

Before going on with the installation and especially before activating CRON, we advise you to configure the extensions; please refer section 2.2 of this document.

We also advise to execute manually CRON to make sure the operation is going well.

For that, you can type directly CRON url on your browser:

<http://www.maboutique.com/cron.php>

Refresh this page as many times as required in order to have no message showing processed tasks

You can now re-activate CRON normally.

Execute the 2 following steps:

- Sales Menu > Order preparation : Click on button « Force update »

- Purchasing Menu > Supply needs : Click on button « Force update »

2.1.4 Update front theme

Some feature generates new items display on customer area and front side pages.

By default, front theme is located in :
App/design/frontend/default/default

However, you probably your own theme which should be located in :
App/design/frontend/default/[votre_theme]

2.1.4.1 Display estimated delivery date in cart

This feature allows displaying an estimated delivery date for product added to cart before customer places order. Estimated delivery date is calculated using products stock, shipping method etc...

To display those information in the cart page

- Edit file app/design/frontend/default/[votre_theme]/template/checkout/cart.phtml
- Add the following code line #110 (line numbers can change depending of your theme)

```
<?php echo $this->getChildHtml('planning') ?>
```

2.1.4.2 Display sales order progress graph in customer sales history

This feature allows displaying a graph that summarizes sales order management progress and displays a realistic delivery date.

To add this graph in the sales order history page :

- Edit file app/design/frontend/default/[votre_theme]/template/sales/order/info.phtml
- Add the following code line #61 :

```
<?php
if(Mage::getStoreConfig('planning/quote_options/show_planning_in_sales_history') == 1)
{
    if ($_order->getStatus() != Mage_Sales_Model_Order::STATE_CANCELED)
        echo $this->getChildHtml('planning');
}
?>
```

2.1.4.3 Display product stock information in product page

- Edit file
app/design/frontend/default/[votre_theme]/template/catalog/product/view.phtml

- Add the following code line #100 :

```
<?php echo $this->getChildHtml('stock');?>
```

2.1.5 Conflicts with other modules

Magento's architecture is planned to allow extensions to modify the basic Class behavior: Rewrite feature. However this function has a limit: 2 extensions can not rewrite the same class.

To see the list of rewrite classes by these extensions, please refer to the file config.xml, rewrite section.

If you have other extensions rewriting the same classes, you have only one solution: Gather rewritten processing in the same file, in this case you will have to modify the extensions: further updates and assistance on the extensions will not be accepted.

Maison du Logiciel offers a free extension to identify extensions conflicts. You can download it for free from our website: www.maisondulogiciel.com

2.2 Configuration

This part describes different configuration elements of the extensions.
It is important to fill different configuration elements before using extensions.

Note: If you get the message « Access Denied » during your first access, you have to disconnect and reconnect from administration interface in order the reboot permissions.

2.2.0 Magento's Configuration

Pay attention, this step is crucial

Magento automatically decrease a product stock when a shipment is created.
This is an issue for purchasing extension as it manages stocks via movements:
This option has to be disabled with also the option which automatically puts again on stock a product when an order is cancelled:
System > configuration > catalog > inventory > Stock option

Inventory

Stock Options

Set Items' Status to be In Stock When Order is Cancelled

Decrease Stock When Order is Placed

2.2.1 Purchasing extension configuration

2.2.1.1 PDF printing options

PDF header: Text displayed in the PDF headers. This contains usually your company address

PDF footer: Text displayed in the PDF footer. This contains usually your company's legal informations

Comments: You can put free comments on this part that will be displayed down the PDF files. For example you can show suppliers comments for an order.

2.2.1.2 Configuration

Forwarders: Forwarder's list that you can use for a supplier order. Each element shall be separated with a comma.

Payment methods: Payment methods available with supplier order. Each method shall be separated with a comma.

Automatic confirmed payments: If ticked, the field "approved payment for a customer order" will be automatically changed to "yes" when the invoice is created.

Quantities check when creating a shipment: if selected, when you create manually a shipment with Magento, if required quantities are not available, a alert message appears.

2.2.1.3 Considered orders

This part will allow you to define which orders are processed while calculating the supply needs. For example, this part will allow you not to process unpaid customers orders.

Order status: specify orders status used for supply needs calculations

Apply to paid orders: If ticked, orders where status "confirmed payment" is not "yes" will not be processed.

Apply to orders where due amount is equal to 0: If ticked, orders, where due amount is higher than 0, will not be processed.

2.2.1.3 Supply needs

Set supply need as critical if is the only missing product for an order : if checked, a warning will be displayed in supply needs if product is the only one missing to ship an order.

Delete manual supply need when stock level ok : if checked, if a product gets a manual supply needs, it will be reseted if product stock reaches supply needs level.

2.2.1.4 E-mail the supplier order

Here you will be able to configure PDF supplier's orders dispatch via email.

Shipper: The email address to be used to send the email to suppliers

Email template: Template/model used to send the supplier order

CC: Email send to suppliers will also be forwarded to this address

Company name: Name used in the subject of email sent (order for XXX)

2.2.1.5 Supplier order

Record the product cost: If selected, when a supplier order is totally processed, the buying price and absorption costs is recorded in the field "costs" of product sheet.

Use the product costs: If selected, when you add a product in a supplier order, the buying price will automatically appear from the recorded "costs" in the product sheet.

Fill automatically products buying prices: If selected, while adding a product in a supplier order, the buying price will automatically appear as per last buying of this product with this supplier. You can also see these costs in the product buying sheet.

Check captured quantities: If ticked, it will not be allowed to capture higher quantities then the ordered quantities.

Absorption costs calculation method: When a supplier order is totally processed, the purchasing extension works out the real buying price using all different absorption costs (transport costs, customs charges) of each product. This drop-down menu enables you to select the absorption costs calculation method.

Default tax rate: It is the tax rate to be automatically used for products with a supplier order

Default transport tax rate: It is the tax rate to be used automatically for the transport charges with a supplier order.

Default currency: Default currency used while creating a supplier order

2.2.1.6 Product buying sheet

Pricer tax rate: It is the tax rate used by pricer available in product buying sheet in order to work out the price inclusive of all taxes from the product price without tax.

2.2.2 Logistics extension configuration

Logistics extension configuration is done via BackOffice, System Menu > configuration > sales tab > Order preparation

Note: If you get the message « Access Denied » during your first connexion attempt, you will have to disconnect and re-connect from administration interface in order to reboot permissions

2.2.2.1 General

Following details can be configure:

Order management delay: It is an order management delay when all products are booked (and therefore on stock).

Carrier class: Forwarder's softwares management class

You also have the option of managing forwarder's softwares.

An important point is that the order preparation extension requires the association of each forwarder managed by your website (shipping methods in Magento) with carrier's softwares in order to export order forms.

Each shipping method has its own code.

So as to associate these shipping methods to managed carriers software's, you will have to configure the corresponding codes: This is always done in the preparation order extension part.

2.2.2.2 Order's Gross weight calculation

When from order preparation screen, you add an order to selected orders, you have the possibility to let the extension work out automatically the final gross weight of package to be dispatched.

In order to enable this function, you have to select "yes" in the menu "enable"

Package net weight will be worked out from the sum of its products (from products weights as defined in the product Magento Sheet).

It is also possible to define default packaging additional weight (box etc...) to have the net weight.

If you would like to enable this function, please select a calculation method:
3 methods are available to work out the additional weight:

- **Add a fix weight:** the captured weight in part « value for the method» will automatically be added to the package.
- **Add a fix weight per product:** For each order's product, the weight captured in the part « value for the method» will be added.
- **Add a percentage:** Defined percentage in part « value for the method» will be added to total net weight.

2.2.2.3 Printing options

Print 2x invoices without tax: If enabled, customers invoices will be printed 2x if order does not have any tax

Print invoices 2x: This part allows you to print 2x customer invoices depending on payment method

2.2.3 Customer order forecast configuration

This projection enables you to define the way of calculating customer's schedule. For more information on customer's schedule, see part 5.1 of this document.

2.2.3.1 Consideration date

Consider an order when placed: The order is considered when placed, whatever the payment status is.

Consider an order when invoiced: Order is considered when totally invoiced.

Consider an order when payment is confirmed:

Include public holidays: If selected as « no », the order will be considered the next working day if the order date is a public holiday.

Consider the order for next day if order is placed after: This option allows you to process an order the next day if order is placed after a defined hour. If you would like to consider all your orders the next day, capture the value 0.

2.2.3.2 Preparation date

Avoid public holidays: If enabled, if order preparation is a public holiday, order preparation will be postponed to the next working day.

Maximum date calculation mode: calculation method of maximum date, in value (day) or in percentage.

Value for maximum calculation date: Number of days or percentage to use for the maximum calculation date

2.2.3.3 Dispatch date

Order preparation duration: defines the number of days required to prepare an order when all the products are booked and on stock. If you dispatch the goods the same day after receipt, put 0 in this field.

Maximum date calculation mode: calculation method of maximum date, in value (day) or in percentage.

Value for maximum calculation date: Number of days or percentage to use for the maximum calculation date

Avoid public holidays: If enabled, if dispatched date is a public holiday, dispatch date will be postponed to the next working day.

2.2.3.4 Delivery date

Default customer delivery date: Defines the default transit time of your forwarder to deliver your customer. However you have the possibility to define precise parameters per forwarder and per country (see part 2.2.5)

Delivery deadline calculation mode: calculation method of delivery deadline, in value (day) or in percentage.

Value for maximum calculation date: Number of days or percentage to use for the maximum calculation date

Avoid public holidays: If enabled, if delivery date is a public holiday, delivery date will be postponed to the next working day.

2.2.3.4 Order processing configuration

This part allows you to define parameters used to display the basket (and the final order step) and also the way the delivery deadline is estimated.

In order to estimate the delivery date, it is important to know if the order is considered directly or not (example with credit card payments that are confirmed immediately and for cheque payment where you will wait for its delivery).

So as to manage this issue, our extensions consider 2 payment methods:

- Immediate payment, the order is considered immediately if the response is favorable (bank response for example)

- Deferred payment : payment where you have to receive a proof (Cheque, T/T copy ...)

Immediate payment mode: Defines what the immediate payment methods are

Delay for deferred payments: Defines the average delay for order consideration of deferred payments.

Display schedule in the basket: If enabled, the estimate delivery deadline for the order is displayed in the basket (Chatel Law)

Display debugging information: If enabled, estimate delivery dates calculation's explanations will appear in the basket.

2.2.4 Background tasks configuration

This section is for technicians.

A permanent stock, supply needs other tasks updates forces quit heavy processing. In order to avoid overloading customer's and administrator's interfaces, several tasks are processed in background. This is "BackgroundTask" extension part.

The list of executed or planned tasks is accessible via System menu > BackgroundTask

You can configure it via System menu > Configuration > Admin > Background Task

Maximum execution time: defines the maximum execution time once. Generally matches with `php_max_execution_time`. If you prefer not to overload your server, you can decrease this figure.

Delete errors tasks: If selected as "no", error tasks will stay in the records.

Records: Number of days while records are being saved.

Web manager email: If an error appears, a email will be forwarded to this address.

2.2.5 Delivery deadlines configuration

The configuration is accessible via Purchasing Menu > Delivery deadline

This section allows you to define the delivery deadlines depending on forwarder and enables to define exceptions per countries. These data will be used to define an order schedule:

- Estimate delivery dates display when customer place an order (in the basket or in the order confirmation sheet)
- Estimate delivery dates calculation when order is placed

While displaying, the list of forwarders appears.
If a forwarder does not appear on the list or if still not appears after you already add a forwarder in Magento, click on button “update”.

For each forwarder, you have to advise the following details:

- **Default transit time:** It is the default transit time that your forwarder requires to deliver the customer when order is dispatched. It will be applied if no exception is defined. Please note that if you do not define any default transit time, the one defined in “System > Configuration > Planning > delivery > default transit time” will be taken into account.
- **Exceptions:** exceptions will allow you to define a transit time per country different then default transit time. Exceptions shall follow the hereunder format :
- les exceptions vous permettent de définir un délai de livraison différent de celui par défaut pour un pays donné. Les exceptions doivent suivre le formatage suivant :
 - o Country_code : transit time
 - o Exceptions shall be separated with a comma.

Configuration example:

The following example defines a default transit time for the forwarder « flatrate » of 2 days. It will be used for all the countries not appearing in exceptions. However exceptions are defined for Germany (DE), Italy (IT) and France (FR) with respectively transit times of 7,5 and 3 days.

Shipping Delay Update Carriers Save

Method	Carrier	Default delay	Exceptions
flatrate	Fixed	<input type="text" value="2"/>	<input type="text" value="DE:7;IT:5;FR:3"/>

2.2.6 Product status configuration

This configuration is accessible via Purchasing Menu > Product status

Magento, by default, displays only « on stock » or « out of stock » for a product status.

Purchasing extension allows you to advise more precisely the status when a product is not available:

- Estimate delivery date(in your stock) appears if a supplier order is pending
- Otherwise estimate delivery date to customer appears

The estimate delivery deadline is as captured in the product sheet, in the field « estimated delivery date ». This timing is captured in days.

If you would like to display less precise message on product sheet, you have the possibility to select order status ranges depending on estimate delivery date of a product.
So, a product with 5 days of estimate delivery date can have “one week”

To define range status, please use the form via “Purchasing > Product status slot”.

For each range, you can define:

- **Beginning** : beginning of slot status in days
- **End** : End of slot status in days.
- **Default description**: Default description will be display.
- **Shop XX**: For each shop, you have the possibility to define a different text: It allows multi languages management. Please note that if you do not define any description for a shop, the default description will be used.

If you want to delete a range, tick on « Delete » and click on « save »

To add a range, click on button « Add a range ».

Range examples:

Product availability ranges Add Range Save

From	To	Default Label	Default Store View	Delete
0 days	7 days	1 week	1 semaine	<input type="checkbox"/>
8 days	14 days	2 weeks	2 semaines	<input type="checkbox"/>
15 days	21 days	3+ weeks	3 semaines et plus	<input type="checkbox"/>

2.2.7 Magento Client Computer Settings

Magento Client Computer is a windows platform software used by Embedded ERP to performs actions on your local network such as printing PDF documents or copy files in a specific directory.

Magento Client Computer is required if you wish to use « optimized » mode to prepare orders. Learn more in “Logistic module section” in this manual.

Exchange directory : directory on you web server in which Embedded ERP stores documents Magento Client computer downloads.

Password : Magento Client Computer software uses web services to download documents from the server. For security purposes, it requires a password to download documents. This password must match the one set in Magento Client Computer settings file.

3. Purchasing extension

3.1 General presentation

All purchasing extension screens are accessible via « Purchasing » menu placed near « System » menu in Magento back office.



3.3 Supplier, manufacturer, contacts management

Supplier, manufacturer and contact management is made via Purchasing menu. As the form is standard, we will only draw your attention on important points.

3.3.1 Supplier sheet

In the supplier's sheet, you have the possibility to associate manufacturers with suppliers. It enables to define indication for buyer regarding several ranges provided by suppliers or manufacturers and also to compare pricing.

Kindly note that these associations still allows you to order products from a supplier even if the manufacturer is not associated with supplier.

On the page bottom, you can see the list of orders placed to a supplier. You can access the order by clicking on its number.

3.3.2 Manufacturer sheet

It is important to understand that the manufacturer management in the purchasing extension is not depending on manufacturers that you can associate to products in the standard Magento's product sheet.

However it is possible to associate them by using manufacturer's creating sheet in the field "Magento manufacturer".

Edition Fabricant

Retour Enregistrer

Id	1	Ville	<input type="text"/>
Nom	TOTO SA	Pays	Andorre
Contact	<input type="text"/>	Telephone	<input type="text"/>
Adresse 1	<input type="text"/>	Fax	0404040404
Adresse 2	nnnnn	Email	toto@totosa.com
Code Postal	<input type="text"/>	Site Web	<input type="text"/>
Comments	<input type="text"/>		
	Fabricant magento	<input type="text"/>	<input checked="" type="checkbox"/> Créer

Kindly note that if you tick button « Create » placed on the right hand side of this field, you can automatically create the manufacturer in Magento and associate him to the manufacturer you are creating.

3.2 2 Buying product sheet

3.2.1 General presentation

Buying product sheet allows to check stock status for a product, to define the pricing, to see the associated suppliers and manufacturers, to review different suppliers orders for the product, and finally to see the stock movements.

As a standard, Magento only have one field for the stock management. The purchasing extension manages in addition to the stock movements, to work out the stock status as per the records.

« Buying » product sheet is linked to Magento products; it is naturally not required to re-create them.

Editer un Produit

Id	1
Sku	echare-toile
Description	Echarpe en toile
Prochaine date d'approvisionnement	2009-04-07 00:00:00
Delai d'approvisionnement par défaut	5 jours

- **Estimated supply date:** This date is automatically worked out from pending suppliers orders. This date will be also useful to estimate the delivery deadline for the customer's orders.
- **Average supply estimation :** It is the average number of days required to receive the product when product is out of stock. This data will also allow be used for customer's order delivery dates calculation if an order contains this product and if it is not on stock. Kindly note it will be working days.
- **Exclude from supply needs:** If ticked, the product will never appear on the supply needs (useful for the article removed from range).
- **Default tax rate:** It is the default tax rate used when adding the product in a supplier order. It is also possible to change the tax rate directly while placing the order.

3.2.2 Stock status summary

Stock

Stock	Stock mini	Qte Commandée	Qty Necessaire	Qte en attente de Livraison	Delta	Statut
141	15	2	0	0	0	OK

This section will allow you to check different stock indications as follows:

- **Stock:** It is the product real stock value.
- **Minimum Stock:** It is the minimum required stock quantity for a product.
If the quantity on stock become less then this limit, a supply need alert will appear
- **Customer ordered quantity:** It is the product quantity ordered in all customers's pending orders.
- **Needed quantity:** It is the required quantity for minimum stocks and customer's orders. This value does not include the supplier's pending orders quantities.
- **Pending order quantity:** It is the quantity of goods ordered from supplier's still not arrived on stock. Products are considered as "pending" since they appear in a supplier orders with status "delivery pending".
- **Booked quantity:** It is the quantity booked from stock for customer's pending orders. Customer's pending orders can be displayed if you click on tab "Pending customer's orders".
- **Status :** Global supply status of the product

Few figures examples in the following chart:

Stock	Minimum stock	Customer qty ordered	Qty needed	Pending order quantity	Delta	Status
1	0	0	0	0	0	OK
0	2	0	2	0	2	Stock mini
1	1	2	2	0	2	Supply

						order
3	4	1	2	1	1	Supply order




If you have any doubt on the date appearing in this chart, you can click on button « Update stocks » and all figures will be updated.

3.2.3 Pricing tool

This chart will help you to define your sales price depending on several details.

The column “buying price” gives the product buying pricing including absorption costs (kindly refer to part supplier orders). This column is the same as section “Cost” from tab “prices” in Magento product sheets. However date is automatically captured with suppliers order management extension.

Assistant Prix

Prix Achat	Prix Vente HT	Prix Vente TTC	Marge %
14.5900	25 	29.9 	41.640 

Finally, you can update this value by clicking on « compute buying price » placed on the top of the screen. For more information, kindly check section “Order management” of this document.

In order to change the product price, you can act on the price without taxes, with taxes or required margin.

Capture the value required in one of the fields and click on button « Update » to update all the sections. Once the required price is captured, click on button “Save”.

Note: If the product was never bought from any supplier, buying price will not appear.

3.2.4 Associated suppliers

This section allows you to associate suppliers to your product and to access the last purchasing prices from different suppliers.

Two prices are displayed :

- Last buying price (the one automatically captured when creating a new supplier order after adding the product in the basket)
- The buying price with absorption costs.

Fournisseurs Associés

Nom	Date	Dernier Prix Achat	Ref	
Fabricateur d echarpes	2009-04-01	14.09	4856	Editer - Supprimer

Ajouter un Fournisseur :

Reference Fournisseur	<input type="text" value="4856"/>
Positionnement Prix	<input type="text" value="Excellent"/>
Comments	<input type="text" value="dispo fréquente"/>
Enregistrer	<input type="button" value="Enregistrer"/>

3.2.5 Stock movements

As informed above, the purchasing extension enjoys a stock management more sophisticated than Magento. It is from the stock movements (positive or negative) that the real stock is worked out.

Mouvements de Stock

Date	Type	Qte	Description	Action
2009-04-02	Approvisionnement	127	Purchase Order #20090402BC1 from Fabricateur d echarpes	Supprimer
2009-04-02	Approvisionnement	4	Purchase Order #20090401BC1 from Fabricateur d echarpes	Supprimer
2009-04-02	Approvisionnement	2	Purchase Order #20090401BC1 from Fabricateur d echarpes	Supprimer
2009-04-02	Approvisionnement	2	Purchase Order #20090330BC1 from Fabricateur d echarpes	Supprimer
2009-04-02	Approvisionnement	2	Purchase Order #20090330BC1 from Fabricateur d echarpes	Supprimer
2009-04-02	Commande client	-1	Order #100000012	Supprimer
2009-04-01	Don	-1	test2	Supprimer
2009-04-01	Commande client	-2	test	Supprimer
2009-04-01	Approvisionnement	5	Purchase Order #20090401BC1 from Fabricateur d echarpes	Supprimer
2009-03-30	Approvisionnement	3	Purchase Order #20090330BC1 from Fabricateur d echarpes	Supprimer

Add Stock Movement

<input type="text" value="2009-04-06"/>	<input type="text" value="Approvisionnement"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="Ajouter"/>
---	--	-------------------------------	-------------------------------	--

Several stock movements types are existing:

- **Supply** : Positive movement concerning an order delivery
- **Order** : Negative movement regarding customer order delivery
- **Rma**: Positive movement: This is when a product is returned from a customer delivery, the product is put on stock again.
- **Donation** : Negative movement corresponding to a gift or donation
- **Loan**: Negative movement corresponding to a loan.

For each stock movement, you have the possibility of showing a comment.

You can capture manually stock movements but you have to know that some stock movements are automatically generated by purchasing during following events:

- While creating a customer order shipment, a negative stock movement is generated corresponding to dispatch quantity.
- While creating a shipment in order management extension, a positive movement is created.

Please be careful, it is important to know that no movement is done for Magento credit notes (credit memo) because these credit notes can be generated with a simple customer cancellation (or putting product on stock again) but also for faulty products return where a solution can be arranged with the order cancellation. In this case, it is compulsory to update stock movements manually.

3.2.6 Customer pending orders

The following chart shows the customer's orders containing this product and that are not yet dispatched. For each supplier order, you can check the ordered quantity, dispatch quantity, booked quantity.

Page 1 sur 1 page(s) | Consulter 20 par page | 2 articles trouvés Reset Filter Chercher

Id	Date d'achat	Nom (Fact.)	Montant total (Devise de la commande)	Qté	Qté	Qté	Qté	Statut
				commandée	livrée	à livrer	réservée	
	Entre: <input type="text"/> Et: <input type="text"/>	<input type="text"/>	Entre: <input type="text"/> Et: <input type="text"/>					<input type="text"/>
300000029	4 sept. 2009 15:00:32	Marion Cotillard	43.4600	2	0	2	2	En attente
300000030	4 sept. 2009 15:03:30	Marion Cotillard	86.9300	4	0	4	4	En attente

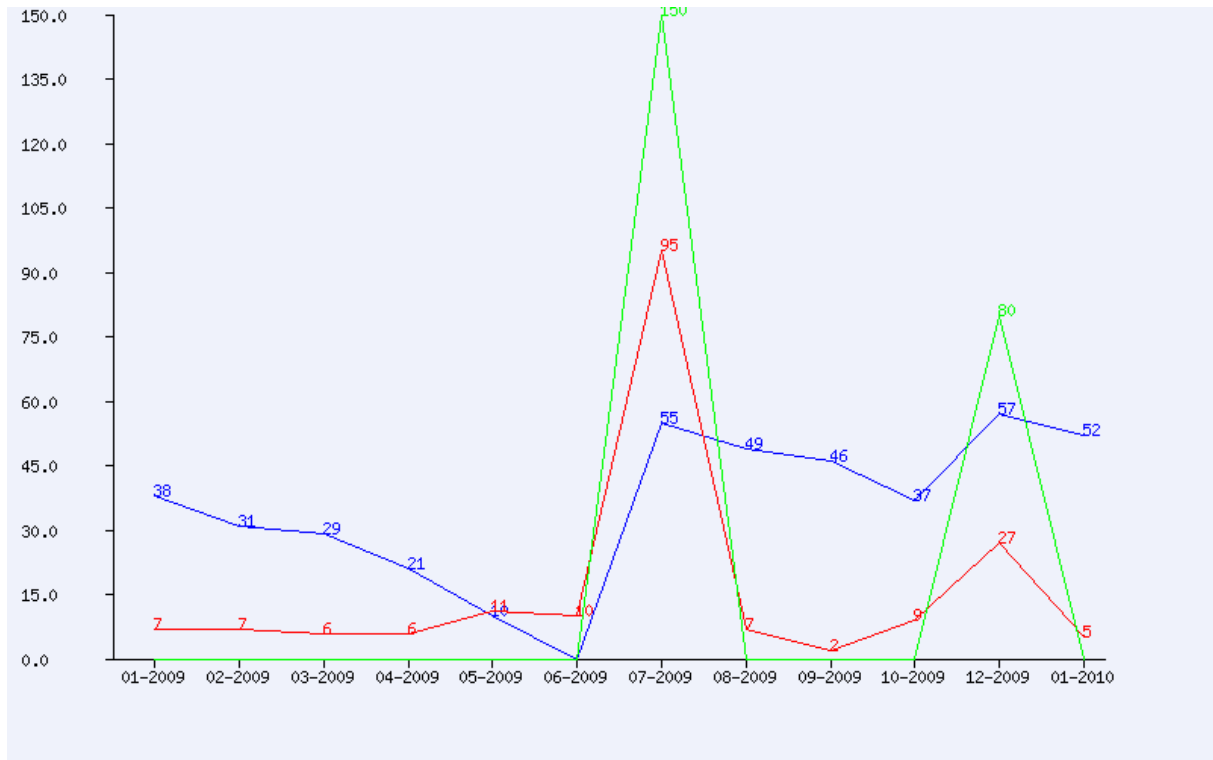
For each customer's orders, you can see the product booked quantity for this order. Products booking notion for an order is very important because booking will allow defining if an order can be dispatched or not in the logistics extension: an order can be dispatched only after all the required products are booked.

Products booking is made in chronological order: first ordered, first served. However you can be willing to allocate products for other orders. To allocate a book product to another order, you have first to "free" (release) the product from the order and then book it for the other order: This is possible with the links that you can find on the right hand of orders.

Kindly note that if quantity on stock is not sufficient, the booking will not be applied: You can not book products that are not on stock.

3.2.7 Graph

In this tab, you can display a graph that summarizes product stock level fluctuations.



You can set different parameters to control graph display :

- Information to display :
 - o Stock level
 - o Outgoing : sum of negative stock movements
 - o Ingoing : sum of positive stock movements
- range
 - o Select start date, end date and also time unit.

Once parameters are set, click on button « Update graph »

3.3 Supply needs list

Supply list needs is accessible via Purchasing Menu > Supply needs.

Supply needs list is worked out with products as follows:

- Where real stock is less than minimum required quantity
- When quantities ordered from customers is more than product on stock
- Both above factors combination

This screen has a cache system to optimize processing. To update cache (in order for example to take into account a new order), you just have to click on button « Refresh » placed on the top of the screen.

For more details on product supply needs status, kindly check the above product sheet section.

Supply Needs Refresh cache

Page 1 of 2 pages | View 20 per page | Total 37 records found Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions Submit

	Priority	Manufacturer	Product	Status	Details	Qty	Dead Line	Dead Line for Purchase	Suppliers
Any									
<input type="checkbox"/>	8	toto	echarpe en plexiglas	Supply for mini qty	💡	12			Fabriquant d echarpes fd, John, FournisseurBijoux, Sofa Trading Company (12.00) , adidas (12.00), Apple Retailer (15.23),
<input type="checkbox"/>	8	Apple	Iphone	Supply for mini qty	💡	8			Sofa Trading Company, John, Sodis, Fabriquant d echarpes fd, FournisseurBijoux, TEST SUPPLIER, Demo (12.02) , Apple Retailer (13.00), Wall Mart (35.00),
<input type="checkbox"/>	8	Apple	Ipod Shuffle	Supply for mini qty	💡	9986			Apple Retailer, Fabriquant d echarpes fd, FournisseurBijoux, Scan (40.30) ,
<input type="checkbox"/>	8	Apple	Mac G4 plus	Supply for mini qty	💡	9744			Apple Retailer, FournisseurBijoux,
<input type="checkbox"/>	8	toto	Chaussettes bleues	Supply for mini qty	💡	9987			Scan, FournisseurBijoux, Mon fournisseur, John (7.51) , supplier XX (8.18),
<input type="checkbox"/>	6	toto	Chaussettes noires	Supply for orders	💡	10340			FournisseurBijoux, adidas, John (6.65) ,

This list is made up of several columns:

- **Manufacturer** : Manufacturer (Magento) associated to the product
- **Description** : Product description and link to product sheet
- **Status**: Reason of the supply needs (minimum stock alert or customer order).
- **Details** : Displays a tool-tip which sums up main information of the supply need :
 - o **Stock** : Real product stock
 - o **Stock mini** : Minimum quantity on stock for the product
 - o **Pending customer ordered quantity** : required quantity to process pending customers orders
 - o **Pending supplier ordered quantity** : quantity pending from supplier to be delivered
 - o **Needed quantity** : Quantity to be ordered to fulfill the supply need
- **Needed quantity** : Quantity to be ordered to fulfill the supply need
- **Suppliers** : Suppliers that can provide required product (associated to the product)
- **Delivery deadline**: It is the last delivery date when you have to receive the product to meet your delivery deadline informed to customer. This date matches with the most recent preparation date for pending order with this product. Kindly note that if you can modify this date for the order in the tab planning.
- **Purchasing deadline**: It is the last date when you should place the order to your supplier. This date matches with “delivery deadline” less then average estimate supply date for this product.

You can sort our your product list by using links present in the letter head of columns or filter results with drop-down menu available on the top of the list.

When a supply need is processed (That is to say the supplier order was created) its status becomes”OK”.

When the supplier order for a supply need is received, the supply needs is removed.

Note: The supply needs list is automatically update when a product status changes. However you can also manually refresh the list by clicking on button « Force update ».

3.4 Supplier orders management

3.4.1 Order creation

You can create an order with 2 methods:

- First directly by clicking on the button « New » from order list.
You will have to select the supplier and to confirm to create a new empty order form
- Second from the supply need list: Select the required products by ticking the corresponding box on the left hand side of the list. Kindly use the drop-down menu “Mass actions” on the top of the list, select “create a supplier order”, choose the supplier associated and click on “Submit”: a new order will be created and selected products will be automatically added.

3.4.2 Order status

Supplier order status is important because it defines how the order will be processed in the system:

- **New:** It is the basic supplier order status. Order is not yet placed in the system for supply needs calculations.
- **Inquiry:** Similar as new status. The only difference concerns the order printing : in this case, pricing are not displayed on the PDF form.
- **Pending order:** with this status, the order is processed in the supply needs. Products where ordered quantity is missing will appear in the supply needs.
- **Terminated:** Order is executed and finished. When the order has this status, several operations are done:
 - o Product and supplier are automatically associated. This means for example that if you create a filter with this supplier in the supply needs list, this product will be displayed.
 - o Product costs appear automatically in the product sheet (with absorption costs).
 - o Last product buying price with this supplier goes in the records.
 - o Product quantities not delivered will not appear in the supply needs list.

3.4.3 Product addition

In order to add a product to your order, you have 2 solutions:

- **Manually :** Click on the button « Add Product », a new capture section will appear, select the required product, capture all date and click on “save”:

The screenshot shows the 'Purchase Order #20091111BC1' interface. On the left is a sidebar with navigation options: Summary, Products, Add Products, Deliveries, Send to supplier, Accounting, and Organizer (0). The main area displays a table of products with columns for ID, Sku, Name, and Qty. The table contains four rows of product data, with checkboxes in the first column and quantity input fields in the last column.

<input type="checkbox"/>	ID	Sku	Name	Qty
<input type="checkbox"/>	Any		arpe	From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/>	1	echare-toile	Echarpe en toile DE OUF !!!!	<input type="text"/>
<input checked="" type="checkbox"/>	2	echarpe-plexi	echarpe en plexiglas	4
<input type="checkbox"/>	44	jkggkjkgk	Echarpe en toile	<input type="text"/>
<input checked="" type="checkbox"/>	144	Echarpe en toile	Echarpe en toile	7

- **From supply needs:** click on the button « Import from Supply Needs » on the top of the order: at this moment, a new window opens with the supply needs list. Select the required products in this new window and click on « Import ». Window will close; products will be added to your order.

Import from Supply Needs

Page 1 of 2 pages | View 20 per page | Total 37 records found

Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

Priority	Manufacturer	Product	Status	Details	Qty	Dead Line	Dead Line for Purchase	Suppliers
Any								
<input type="checkbox"/>	8	toto	echarpe en plexiglas	Supply for mini qty	12			Fabriquant d echarpes fd, JOhn, FournisseurBijoux, Sofa Trading Company (12.00) , adidas (12.00), Apple Retailer (15.23),
<input type="checkbox"/>	8	Apple	Iphone	Supply for mini qty	8			Sofa Trading Company, JOhn, Sodis, Fabriquant d echarpes fd, FournisseurBijoux, TEST SUPPLIER, Demo (12.02) , Apple Retailer (13.00), Wall Mart (35.00),
<input type="checkbox"/>	8	Apple	Ipod Shuffle	Supply for mini qty	9986			Apple Retailer, Fabriquant d echarpes fd, FournisseurBijoux, Scan (40.30) ,
<input type="checkbox"/>	8	Apple	Mac G4 plus	Supply for mini qty	9744			Apple Retailer, FournisseurBijoux,
<input type="checkbox"/>	8	toto	Chaussettes bleues	Supply for mini qty	9987			Scan, FournisseurBijoux, Mon fournisseur, JOhn (7.51) , supplier XX (8.18),
<input type="checkbox"/>	6	toto	Chaussettes noires	Supply for orders	10340			FournisseurBijoux, adidas, JOhn (6.65) ,
<input type="checkbox"/>	8	toto	Chaussettes blanches	Supply for mini qty	9998			FournisseurBijoux, JOhn (13.94) ,
<input type="checkbox"/>	8		XPC	Supply for mini qty	9999			FournisseurBijoux, Scan (5.00) ,

For each ordered product, you have the possibility to force the product description and define the supplier's reference.

You can define the quantity, buying price without VAT and the Eco tax amount.

For information, the column « last price » contains the product last buying price.

To delete a product, tick on box « delete » for the product and click on “save”.

3.4.4 Taxes rates management

Several taxes rates can be managed in a supplier order:

- A tax rate corresponding to transport charges and customs duties: it is the rate specified on the top part of supplier order.
- A tax rate to be used for each product: Every product can have its own tax rate. Default tax rate applied to products is to be configured in the section purchasing extension configuration (system > configuration > Purchasing extension > General). However this rate can be personalized per product by going in the sheet buying product. When the product is added to the order, the default rate or the product associated rate is recorded. You can change it directly in the supplier order form sheet.

Tax Rates New

Page 1 of 1 pages | View 20 per page | Total 6 records found Reset Filter Search

Id	Name	Rate
1	No tax (0%)	0.00
2	Tva 5.5%	5.50
3	Tva 19.6%	19.60
7	US Tax	2.18
8	USA CA State Tax	9.00
9	Test Tax	4.23

In order to manage the tax classes available for supplier's orders, use the form in the « Taxes » menu under the “Purchasing” menu.

3.4.5 Products arrival

When products are received, you have to declare the delivery in the order sheet. It will allow:

- Stock update (of received goods) and create stock movement
- Update supply needs(or delete supply needs)
- Book products for customers pending orders (there pending orders could be dispatched if total required items arrived on stock)
- Update arrival order percentage (available in the supplier orders list).

Résumé

Produits

Add Products

Livraisons

Envoyer au fournisseur

Comptabilité

Organizer (0)

Commande fournisseur no 20091109BC2

Retour RAZ Imprimer Importer des besoins d'approvisionnement Supprimer Enregistrer

Livraisons

Date	Product	Qte	Description
2009-11-09	produit 1	1	Purchase Order #20091109BC2 from Fournisseur test

Créer une Nouvelle Livraison Commande complète

Date: 2009-11-12

Product	Qte	Qte Commandée	Qte déjà livrée	Qte restante
produit 2	0	1	0	1

To declare an arrival, kindly go into the order sheet, capture each received product quantity and click on « save ».

If you receive the full order, you can use the button « full order » that allows to capture automatically the received quantities equal to ordered quantities. Then click on button “Save” to create your deliveries.

When a supplier order is fully received, its status becomes automatically as « Finished ».

Kindly note that you have the possibility to modify capture interface of received quantities by replacing texts sections with drop-down menu. You will have not only a easy capture, but it will also avoid to capture received quantities less then ordered quantities.

To change this parameter, kindly go in menu System > Configuration > Purchasing > Supplier order > check received quantities

3.4.6 Closure

Supplier order closure is made by changing its status into « terminated » and by clicking on save ». It will

- Exclude non received quantities from « pending products ».
- Record associations between supplier and product. It will allow on the first hand to display the product supply needs when you make filter per supplier, and on the other and to see pricing per supplier in the product sheet (Gross price with absorption costs).
- Distribute the absorption costs per product and stock the « costs ».

Note regarding product buying price: It is worked out from product unit price, absorption costs distribution (transport charges, customs duties). Absorption costs distribution can be made with quantity or as per product value pro rata. To define the rule to be used, go in system > configuration and select tab “purchase”.

Then it is possible to see the margins for an order by going into the customer order sheet. Please pay attention, if the buying price of a product is not known while placing order, it will not be possible to know the margin even if its costs is worked out after.

3.4.7 Supplier order forwarding

In order to forward the supplier order, you have 2 options: You can first print the corresponding PDF form and send it by your own ways, or you can use the dispatch form sheet by selecting the concerning tab in the t supplier order sheet.

Envoyer la commande au fournisseur

Veuillez saisir les commentaires et cliquez sur le bouton envoyer afin d'envoyer le mail au fournisseur
Email fournisseur : sales@computerplanet.com
Mail envoyé le : 3 sept. 2009 17:55:00

Changer le status de la commande à en attente de livraison après envoi du mail

Envoyer au fournisseur

Kindly note that it is not possible to send a supplier order by email if its status is “terminated”.

To forward by email your order, capture your message and click on button « send ».

To configure email dispatch, refer to this document configuration section.

3.5 Tools

Tools are available using Menu « Purchase > Tools »

3.5.1 Mass Stock Editor

Using this screen, you can easily and quickly edit product stock but also preferred stock level

Edition des stocks en masse Enregistrer

Page 1 sur 11 page(s) | Consulter 20 par page | 210 articles trouvés Reset Filter Chercher

Réf.	Nom (usage interne)	Fabricant	Statut	Stock	Stock mini
ProductTierPrice	ProductTierPrice		Activé	5016 <input type="checkbox"/>	9999 <input type="checkbox"/>
sdfa	parth test		Activé	10 <input type="checkbox"/>	9999 <input type="checkbox"/>
33223	errere	adidas	Activé	30 <input type="checkbox"/>	9999 <input type="checkbox"/>
Pcs	Galaxy Chocolate Cake 30 Gms 5 Pcs	adidas	Activé	23 <input type="checkbox"/>	9999 <input type="checkbox"/>
Pcs.	KDD JUICE 1 LTR	Apple	Activé	196 <input type="checkbox"/>	9999 <input type="checkbox"/>
CANAP_2	Canapé rouge	Krokofarm	Activé	65 <input type="checkbox"/>	4 <input type="checkbox"/>
hghghg	aaaa		Activé	0 <input type="checkbox"/>	0 <input type="checkbox"/>
BR	BROSSE BLANCHE POIL RAS NOIR	toto	Activé	800 <input type="checkbox"/>	7 <input type="checkbox"/>

To edit product stock, check matching checkbox and change value.

Once all changes are filled, click on “Save” button to apply changes.

3.5.2 Tous les mouvements de stocks

Cet écran vous permet de consulter tous les mouvements de stocks pour tous les produits. Ceci est utile pour retrouver des mouvements de stocks pour un libellé précis.

4. Logistics extension

4.1 Important notices regarding product management

In order to manage configurable products (or bundle products), it is compulsory that the parent product has a non activated stock management. So, only contained product will have the stock management option and it is their status which shall allow if they can be dispatch or not.

Moreover, if you wish to make partial order shipments containing “bundle” product types, you have to specify that product will be dispatched separately in the bundle product sheet.

4.2 General process

There are 2 ways to prepare orders in Embedded ERP :

- Optimized way
- Manual way

4.2.1 Optimized Process

This process requires to use Magento Client Computer (see Magento Client Computer section for more information)

- **Pending orders list** : this screen contains 3 tabs that list complete orders, stockless orders and ignored orders.
- **Select orders to prepare** : Order handling agent select orders to prepare using payment validation state, shipping method and sales order stock status.
- **Print picking list** : once orders to prepare are selected, the picking list contains the list of necessary products to process orders.
- **Process orders** : orders are managed one by one. Order handling agent can change products qty, fill package weight and other shipping information and in one click, create shipments and invoices, print documents and shipping label.
- **Import tracking numbers**: Once shipments are done, shipping software usually create a tracking file that contains tracking numbers for every shipment. You can easily import this file to save tracking numbers in sales order and allow customers to track its shipment.
- **Notify Customer** : in one click, send emails to customers to notify about the shipment and invoice
- **Finish** : once all steps are performed, click on “Finish” button to remove orders from the selected orders list

4.2.2 Manual process

Manual process implies to manually print documents, and manually export shipping information in shipping software to print shipping labels.

- Order handling agent can consults order to be processed during the day from a list representing visually full orders and orders where products are missing.
- He select the order that he wants to dispatch (full orders or partial shipments for orders where goods are missing) :
- System generates massively invoices and delivery notes corresponding with selected orders.
- Order handling agent captures the different packages weights and transport method options.
- An export towards carrier's softwares is made in order to create the shipping labels.
- An import from carrier's softwares is made in Magento to update shipments tracking numbers
- Mass customer delivery notification

- End of the day

4.3 *Magento Client Computer*

Magento Client Computer is windows platform Software designed to perform actions on your local network directly from the Magento interface such as printing document on your printer or copy file in a specific location.

To benefit of this feature, Magento Client Computer must be installed on a local computer.

4.3.1 Prerequisites

- Windows 2000, XP, Vista, Seven
- Adobe Acrobat Reader 8 / 9
- Default printer installed on the computer
- Microsoft .Net Framework 2.0 (can be download for free on microsoft website)

4.3.2 Installation

Magento Client Computer Setup program is available in Embedded ERP archive. Simply launch MagentoClientComputerSetup.exe and follow instructions.

4.3.3 Settings

To set up MagentoClientComputer, edit pref.xml file (located in program directory : C:\program files\maison du Magento Client Computer\)

You can edit pref.xml using notepad.

To fill a parameter, simply edit « value » attribute.

Pour éditer un paramètre, il vous suffit de saisir sa valeur dans la zone value=''

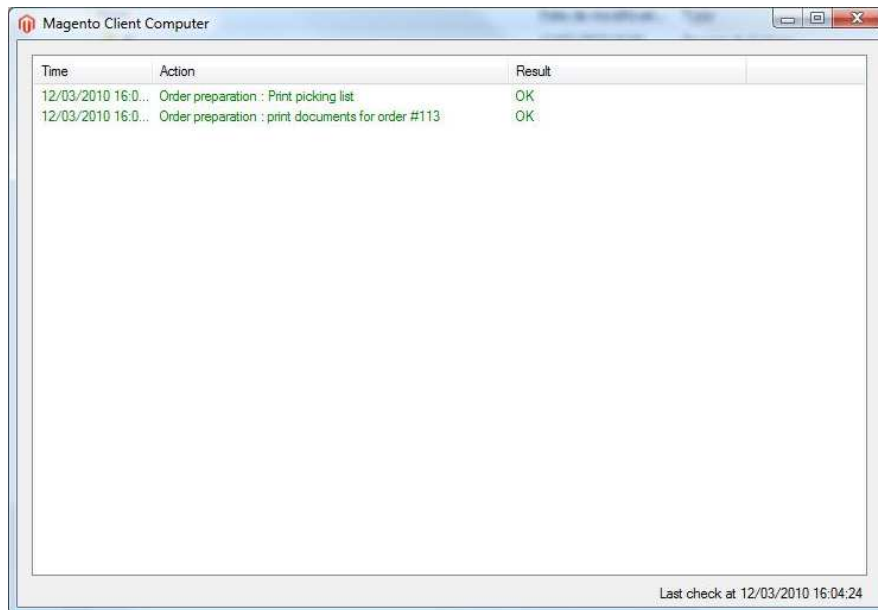
Parameter	Description
url	<p>Communication page url to download actions to perform : http://www.yourwebsite.com/ClientComputer/Front/</p> <p>You can manually call this url in your favorite to check url. If you get « Access denied » message, it means that the url is correct</p>
Password	Password set in Magento, menu System > Configuration > Client Computer > password

Once parameters are set, close pref.xml and restart Magento Client Computer.

4.3.4 How to use

Once Magento Client Computer is launch, a new magento icon is displayed in the system tray (in the bottom right corner).

To display main dialog, double click on the Magento icon :



Each time an action is performed, a new row is displayed in the main list describing the action and its result.

If an error happens, row is displayed in red.

4.3.5 Integration with Shipping Softwares

When printing shipping labels from order preparation screen, the system performs the following steps :

- Order preparation extension creates an export file with customer, order and shipping information. It uses carrier template to properly format file
- Magento Client Computer downloads this file and store it in the directory associated to the carrier.
- Each time a new file is stored in this folder, Shipping Software process it to gather information and print shipping label.

Before using this feature, you must set Shipping Software directory in Magento Client Computer. To properly configure directory, follow this steps :

- First, identify shipping software code. Each shipping method has its own code : you can find it in system > carrier template. The code associated to the shipping method is displayed in the carrier template sheet, in the “main information” area.
- Next, you have to define the directory for this shipping method. Open Magento Client Computer preference file (pref.xml) and add a new parameter :

```
<pref name="shipping_method_code" value="directory_path" />
```

Notice: you can set a network directory (such as `\\computer\directory`) but in this case, ensure that your computer has the rights to copy files in this directory.

4.5 Carrier templates

Order preparation requires to exchange files with Shipping Software to :

- Print shipping label using order and shipment information (export file from Magento to Shipping Software)
- Import tracking numbers in Magento (import file from shipping software to Magento)

Order preparation extension includes a file format wizard to create your own import/export files and then work with any shipping software.

4.5.1 Template list

You can display carrier template list using menu System > Carrier Templates

4.5.2 Create a new template

You can create a new carrier template from scratch or importing a template description file (xml file). Some template description file are available to download on our forum : <http://www.maisondulogiciel.com/forum>

To create a new template, select menu System > Carrier template and click on “Create new template” button.

If you wish to create a template from scratch, fill template name and click on save button. To import a template using description file, select xml file and then click on save button.

In the 2 cases, you're redirected on the new template edition page.

The image shows two parts of a web interface. The top part is titled 'Create Carrier Template' and has an orange 'Save' button. It contains a text input field labeled 'Name'. The bottom part is titled 'Import Carrier Template' and also has an orange 'Save' button. It contains a file selection area with a button labeled 'Choisissez un fichier' and the text 'Aucun f... choisi'.

4.5.3 Edit template

Template edition screen contains 3 parts :

- Main information

- Export file description (contains shipping information to print shipping labels)
- Import file description (contains tracking numbers to import in Magento)

4.5.3.1 Template information

Edit Carrier Template Back Delete XML export Save

Template information	
Name	Expedito Inet
Associated Shipping Method	Colissimo
Client directory name	directory_owebiashipping1

Field	Description
Name	Usually contains shipping software name
Associated shipping method	Contains associated Magento shipping method. This information is very important as it is used by the order preparation module to build export file for one order depending of its shipping method.
Client directory name	If you directly print shipping labels from Magento, Magento Client Computer downloads shipping file and must retrieve the correct directory into copy file. This directory is defined using this directory name and the real path stored in Magento Client Computer preferences file (pref.xml)

4.5.3.2 Export file

Export file contains one or more order information to print shipping labels.

Export file (Magento to carrier software)

File name: R_COMMANDE_EXPORT_EXPINET2.txt

Witness File name:

File Format: delimiter

Field Separator: [tab]

Field Delimiter: *

Line end: \n

Add header line:

Custom header:

Remove accent:

Position	Name	Size	Content	Format	Format argument	Delete
0	Shipment	0	{shipment_ref}			<input type="checkbox"/>
1	Customer ref	0	{cust_ref}			<input type="checkbox"/>
2	Company	0	{company}			<input type="checkbox"/>
3	Name	0	{prefix} {firstname} {lastna			<input type="checkbox"/>

Export file	
Field	Description
File name	Generated file name
Witness file name	Some shipping software requires 2 files to print shipping label : a file with shipping information and a witness file to commit label printing request. If needed, simply fill the witness file name in this field.
File format	Fixed size file or delimiter
Field separator	Character used to mark separation of field in a record. This setting is available only for “delimiter” file format.
Field delimiter	Character used to mark the beginning and the end of a field in a record.
End line character	Character used to mark the end of a record in the file.
Add header line	If checked, a row with column list will be added to the export file
Custom header	Some shipping software requires a custom header.
Remove accents	Remove accents and special characters

Once file export main information are filled, you have to describe the file structure to define what information are saved.

To add a new field, fill information in “Add new field” section and click on save button.
To remove a field, check “delete” checkbox and click on save button.

Fields description	
Field	Description
Position	Column position
Name	Column name (used to build file header and used as caption for custom values)
Size	Column max size
Content	<p>Define column content. To define column content, you can use specific code to insert values from the current shipment / order. Available codes are displayed moving the cursor on the light picture. Codes are always delimited with { and }</p> <p>In example, code {firstname} will be replaced with the customer firstname. Note that you can also insert “fix” value :</p> <p>“City : {city}”</p>
Format	<p>With this dropdown menu, you can apply specific formatting to the column content. Several functions are available and can be customized using “format argument” field.</p> <ul style="list-style-type: none"> - Pad left : Right-aligns the characters in this instance, padding on the left with character filled in format argument for a specified total length set in “size” field.

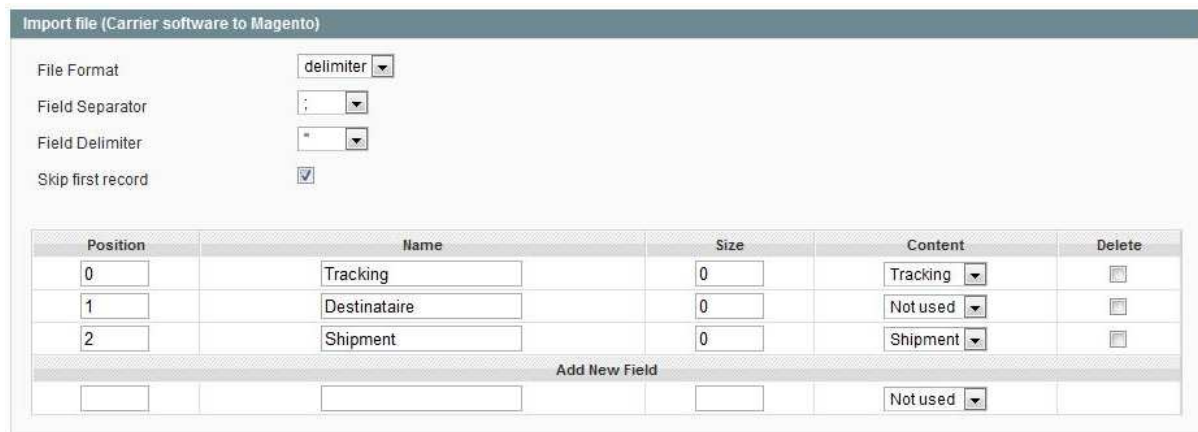
	<ul style="list-style-type: none"> - Pad right : Left-aligns the characters in this instance, padding on the right with character filled in format argument for a specified total length set in “size” field. - Date format : used to format a date value. You can set date format in format argument field (ie: YYYY-mm-dd) - Number format : format field content as a number using format argument (ie :%e6.1f) - Custom value : if field is set as custom value, Order Preparation Agent will have to define this field value when processing order to ship. - Custom list format allow to define a list of possible values in which order preparation agent will have to select a value processing orders to ship. To define list content, use the following syntax : value:caption;value2:caption2;value3:caption3
Argument de format	
Delete	To delete a row, check this checkbox and click on save button

4.5.3.3 Import file

Import file is used to import tracking numbers in Magento.

This file is generated by your shipping software once all shipping label are created.

Importing tracking numbers in Magento is very important as customer could track their shipment from their customer area.



Main information	
Field	Description
File format	Fixed size file or delimiter
Field separator	Character used to mark separation of field in a record. This setting is available only for “delimiter” file format.
Field delimiter	Character used to mark the beginning and the end of a field in a record.
Skip first line	If checked, first record will be skipped (usefull if first line contains header)

Fields description	
Field	Description
Position	Column position
Name	Column name (used to build file header and used as caption for custom values)
Size	Column max size
Content	Defines field content. This information is used by the system to import correct information. 3 values are available for each field: <ul style="list-style-type: none">- Not used : the field content is ignored- Shipment : field contains shipment identification- Tracking : field contains tracking number
Delete	To delete a row, check this checkbox and click on save button

4.6 Order preparation

You can display order preparation screens using menu Sales > Order Preparation.

Each preparation step is available using top button :



Notice : you can customize displayed buttons to fit application to your order preparation process. Learn more about customization in the order preparation setting section.

4.6.1 Orders selection

This step is required for each process (manual and optimised).

To select orders to prepare, click on « Select orders » button :

1. Select orders 2. Print picking list 3. Process orders 4. Shipping label / Trackings 5. Notify customers 6. Finish

To be able to print picking list, documents dans shipping label, you must install [Magento Client Computer software](#) on your computer...

Force Refresh

Full stock Orders (11) Stockless Orders (2) Ignored Orders (0) Selected Orders (5)

Display / Hide Comments

Page 1 of 1 pages | View 50 per page | Total 5 records found Reset Filter Search

Order #	Organizer	Ship to Name	Content to Ship	Shipping Description	Created items	Planning	Actions
From: <input type="text"/>		<input type="text"/>		<input type="text"/>			
To: <input type="text"/>							
100000090		Zimmermann olivier ()	5x bundle separate 10x Chair 15x Ottoman	TNT - TNT	Invoice not created Shipment not created	Prepare : 3/12/10 Ship : 3/15/10 Delivery : 3/18/10	View order Remove
100000089		Zimmermann olivier ()	2x ASICS® Men's GEL-Kayano® XII 2x ASICS® Men's GEL-Kayano® XII	Fedex - Fedex	Invoice created Shipment created	Prepare : 3/12/10 Ship : 3/12/10 Delivery : 3/15/10	View order Remove
100000082		Zimmermann olivier ()	7x bundle separate 7x Chair 7x Ottoman	TNT - TNT	Invoice created Shipment not created	Prepare : 3/12/10 Ship : 3/15/10 Delivery : 3/18/10	View order Remove

This screen is divided in 4 tabs :

4.6.1.1 Fullstock orders

This list contains orders for which all products are in stock and reserved.

You can add a full stock order to selected orders using “select” link on the right column
You can also add several orders at once checking orders checkboxes and selecting “Add to selected orders” in the mass action drop down menu.

4.6.1.2 Stockless orders

This list contains orders for which at least one product is missing (stock insufficient, stock reserved for previous orders).

However, you can partially ship a stock less order.

You can add a stockless order to selected orders using “select” link on the right column
You can also add several orders at once checking orders checkboxes and selecting “Add to selected orders” in the mass action drop down menu.

Note: when you add a stockless order to the selected orders, only available product will be added.

4.6.1.3 Ignored orders

This list contains orders that do not match to the consideration criterias set in system > configuration > purchase module > considered orders.

For example, if you require orders to be paid to be considered, a waiting for payment order will be displayed in the ignored orders list.

4.6.1.4 Selected orders

Selected orders list contains orders to prepare.

You can remove an order from selected ones using “remove” link in the right column.

To track order preparation progress, you can check in “Created items” column orders for which invoice and shipment are created. Notice that if you ship a partial order, invoice is created once all items are shipped.

4.6.2 Print picking list

This step is available for optimized process only.

Clicking on this button, system will directly print picking list document. Picking list summarizes the list of products (and quantity) necessary to process selected orders.

This step has 2 goals :

- Check that all products are really available (broken items, stock errors)
- Gather product to quickly process orders next.

4.6.3 Download picking list

This step is available for manual process only.

Clicking on this button, you will download a PDF document. Picking list summarizes the list of products (and quantity) necessary to process selected orders.

This step has 2 goals :

- Check that all products are really available (broken items, stock errors)
- Gather product to quickly process orders next.

4.6.4 Create shipments and invoices

This step is available for manual process only.

Clicking on this button, system creates invoices and shipments for selected orders. Note: invoice is created only if all order items are shipped.

If you wish to change product shipped quantity for an order, select “Process order” before creating invoices and shipments.

4.6.5 Print documents

This step is available for manual process only.

Clicking on this button, you will download a single PDF that contains every delivery notes and invoices for selected orders.

4.6.6 Process orders

This step is available for manual and optimized processes.

1. Select orders
2. Print picking list
3. Process orders
4. Shipping label / Trackings
5. Notify customers
6. Finish

One Page Preparation - 4 / 5 Next order

Orders : Actions :

Order #100000089	Preparation information																							
<p>Billing address : Zimmermann olivier 254 av jean jaures toulon, Var, 83000 France T: 0494271646</p> <p>Shipping address : Zimmermann olivier 254 av jean jaures toulon, Var, 83000 France T: 0494271646</p> <p>Other : Created at Mar 12, 2010 1:25:18 PM Status : Complete Total : €331.90 Payment method : Check / Money order Payment validated : No Store : Main Website Main Store English</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #d9e1f2;"> <th>Shipping method</th> <th>Total weight</th> <th>Shipment</th> <th>Invoice</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Fedex - Fedex</td> <td style="text-align: center;">12.60</td> <td style="text-align: center;">100000066</td> <td style="text-align: center;">100000067</td> </tr> </tbody> </table>	Shipping method	Total weight	Shipment	Invoice	Fedex - Fedex	12.60	100000066	100000067	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #d9e1f2;"> <th colspan="4">Products</th> </tr> <tr> <th style="width: 70%;">Product name</th> <th>Reserved qty</th> <th colspan="2">Qty to ship</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">ASICS® Men's GEL-Kayano® XII (View) 1x ASICS® Men's GEL-Kayano® XII</td> <td style="text-align: center;">0</td> <td colspan="2" style="text-align: center;">2</td> </tr> </tbody> </table>			Products				Product name	Reserved qty	Qty to ship		ASICS® Men's GEL-Kayano® XII (View) 1x ASICS® Men's GEL-Kayano® XII	0	2	
Shipping method	Total weight	Shipment	Invoice																					
Fedex - Fedex	12.60	100000066	100000067																					
Products																								
Product name	Reserved qty	Qty to ship																						
ASICS® Men's GEL-Kayano® XII (View) 1x ASICS® Men's GEL-Kayano® XII	0	2																						

Whatever process you use (manual or optimized), selected orders can be accessed using the drop down list on the upper left corner. To process a specific orders, select it in this drop down menu.

To process next order, use “next order” button.

Each time you process an order, you’ll have to click on “validate” button to save changes and process actions. You can customize “Commit” button behaviour from system > configuration > order preparation > commit button

4.6.6.1 Manual mode

If you're using manual mode, this screen is used to:

- Change product's quantity to ship
- Fill shipping information (weight and custom fields set in matching carrier template)

Once information is filled, click on "Commit" button to save changes.

4.6.6.2 Optimized mode

If you're using optimized mode, this screen is used to:

- Change product's quantity to ship
- Fill shipping information (weight and custom fields set in matching carrier template)
- Create shipment and invoices
- Directly print invoices and delivery note
- Directly print shipping labe
- Select next order

Each time you process an order, you'll have to click on "validate" button to save changes and process actions. You can customize "Commit" button behaviour from system > configuration > order preparation > commit button

4.6.7 Export to shipping softwares

This step is available for manual process only.

Once shipping information is filled for every selected order, system is able to create a file (using carrier template) to export order information in shipping software and print shipping labels.

1. Select orders 2. Print picking list 3. Process orders 4. Shipping label / Trackings 5. Notify customers 6. Finish

To be able to print picking list, documents dans shipping label, you must install [Magento Client Computer software](#) on your computer...

Download order list for shipping Software

[Download for Expeditior inet](#)
[Download for TNT Microjet](#)
[Download for UPS Worldship](#)

Import tracking file

Shipping Software
File Aucun f...choisi

To download shipping file, click on "Shipping label / tracking" button and select link "download for XXX"

4.6.8 Import tracking numbers

This step is available for manual and optimized processes.

Once orders are sent to your shipping software and shipping label are printed, your shipping software create a file with the shipment list and tracking numbers. You need to import this file in Magento to associate tracking numbers with shipments.

The screenshot shows a progress bar with six steps: 1. Select orders, 2. Print picking list, 3. Process orders, 4. Shipping label / Trackings, 5. Notify customers, and 6. Finish. Below the progress bar, there is a note: "To be able to print picking list, documents dans shipping label, you must install [Magento Client Computer software](#) on your computer...". Under the heading "Download order list for shipping Software", there are three links: "Download for Expeditior Inet", "Download for TNT Microjet", and "Download for UPS Worldship". Below this, under the heading "Import tracking file", there is an "Import" button. At the bottom, there is a form with a "Shipping Software" dropdown menu and a "File" input field with a "Choisissez un fichier" button and the text "Aucun f...choisi".

To import file, click on « Shipping label / tracking » button, select your file in « Import tracking section », select shipping software in the drop down list and click on « import » button. Once all tracking numbers are imported, the system will display the summary.

4.6.9 Notify customers

This step is available for manual and optimized processes.

Clicking on “Notify customers” button, the system will send emails to notify customers about the new shipment and invoice.

Note: this operation is processed very quickly as system do not directly send email but plan background tasks for each order. You can follow email sending progress in background task grid (menu system > background task).

4.6.10 End

This step is available for manual and optimized processes.

Once order preparation is complete, click on this button to remove orders from selected order list.

Notice that if an order has been partially shipped, it will be dispatched in the correct list (fullstock or stockless orders list).

5 Order planning (Chatel law)

Our extension enables the calculation of estimated delivery date for a customer order: It is planning idea. This function allows in real time to estimate the date when the customer will receive his order depending on different parameters such as product availability, supply needs planned, forwarder... etc

Order View

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Preparation
- Planning**
- Organizer (0)

Order # 100000006 | Order Date 8 nov. 2009 21:58:39

Retour Editer Cancel Hold Invoice Ship Reorder

Date de livraison annoncée : 27 nov. 2009
Date maximale de livraison annoncée : 13 déc. 2009

	Date	Forcer	Date max	Commentaires
Date commande	8 nov. 2009 21:58:39	-	-	-
Prise en compte	9 nov. 2009	<input type="text"/>	-	Order placed on 8 nov. 2009 21:58:39 add 1 day as order placed after 13h
Préparable le	23 nov. 2009	<input type="text"/>	7 déc. 2009	produit 2 : 2 missing (supply delay is 13 days = 2009-11-22) produit 1 reserved (1) add 1 days to avoid holy day add 100% to calculate max date
Expédition	25 nov. 2009	<input type="text"/>	10 déc. 2009	add 2 days to prepare order add 1 days to calculate max date
Livraison	27 nov. 2009	-	13 déc. 2009	add 2 days for shipping delay with flatrate_flatrate to FR add 1 days to calculate max date

RAZ Enregistrer

Order planning is defined from 5 dates:

- **Date of order (when order is placed)**
- **Processing date:** It is the date when order is taken into account especially in the purchasing point of vue. In general, this date corresponds with the order payment date.
- **Preparation date:** It is the date when all products for the order are on stock and booked: the date when you can prepare the shipment. This date is worked out depending on default order products availability but also supply needs estimations.
- **Shipping date:** Estimate shipping order date. This date is the date preparation date plus order preparation timing (configured previously).
- **Delivery date:** It is the date when customer received his order. This date is worked out with configuration parameters and also with different forwarder transit time. (See section 2.2.5).

In order to configure the way these different dates are worked out; kindly check the section « Configuration » of this document,

You can see an order planning by going in the sheet order, tab « Planning ».

In front of each step, the last column shows data explaining the calculations. Kindly note that these instructions are only available in English.

Each step has also a « maximum date ». This date is calculated depending on parameters and allows advising the customer the delivery deadline (Chatel Law).

In the configuration part, you can define a risk for each step (Example: in the worst case, the forwarder will have 2 days of delay to deliver the customer).

You also have the possibility of forcing these dates manually.

From all dates, « Preparation date » is very important because it defines the « deadline » for an order in terms of supply. This date will appear in the supply needs screen.

6 Product availability display

6.1 Presentation

As default for product sheet, Magento displays « on stock » or « out of stock » depending on stock status.

Our extensions enable to inform much more by giving precise information to customers:

Product availability is defined as per following parameters:

- If product is on stock (if quantity on stock is superior to pending orders quantity), the message “on stock” will be displayed to the customer.
- If product is out of stock :
 - o If a supplier order is pending, estimate supplier order delivery date will be displayed “delivery scheduled for XX/XX/XXXX”
 - o If there is no supplier pending order, the default product availability will be displayed (average supply days, defined in the “purchasing” product sheet: “Estimate supply date: X days”. Kindly note that you have the possibility to display a personalized message by using availability fields (see section 2.2.6 of this document). This function allows displaying messages such as “Available within 2/3 weeks” and of course to manage several languages.

product 2
[Be the first to review this product](#)

13,00 €

Qty: [Add to Cart](#) OR [Add to Wishlist](#)
[Add to Compare](#)

Quick Overview
product 2

Availability : Out of stock
Supply planned on 17 novembre 2009

product 2
[Be the first to review this product](#)

13,00 €

Qty: [Add to Cart](#) OR [Add to Wishlist](#)
[Add to Compare](#)

Quick Overview
product 2

Availability : Out of stock
Average supply delay : 2 weeks

6.2 Configurable products

Regarding configurable products, a dynamic availability is displayed depending on user selection: as a default, no availability is shown. As soon as the user configures his product, the selected product availability is automatically displayed.

7 Data export

While installing extensions, export profiles are created in order to allow you to export purchasing extension's data. All exports are made with the CSV format.

You can access to these exports from System menu > Import/export > Advanced Profiles.

Following exports are available :

- Export Purchase Order : Exports supplier orders list
- Export Purchase Order Products : Exports supplier orders products list
- Export Suppliers : Exports suppliers
- Export Contact : Exports contacts
- Export Supply Needs: Exports supply needs (at time T).
- Export Product : Exports products (for buying purposes)
- Export Stock Movement : Exports stock movements for all products
- Export Order To Prepare Pending: Exports shipment pending customer's orders (full order or pending order waiting to be fully received).
- Export Order To Prepare : Exports selected customer's orders for order preparation
- Export Order To Prepare Items : Exports selected orders products for order preparation

To execute an export, you just have to select it from export list, to select tab « Execute the profile » and to click on « Execute the profile in a popup ». The profile is executed and once completed, shows the path of created file.

Kindly note all exports are made in the file /var/export in Magento.
(please be careful, this field shall exist otherwise export will show an error).