

Module Embedded ERP

User Manual

Summary

Summary

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Overview

Main features

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
- Multi stock, multi warehouse 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

Purchase 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

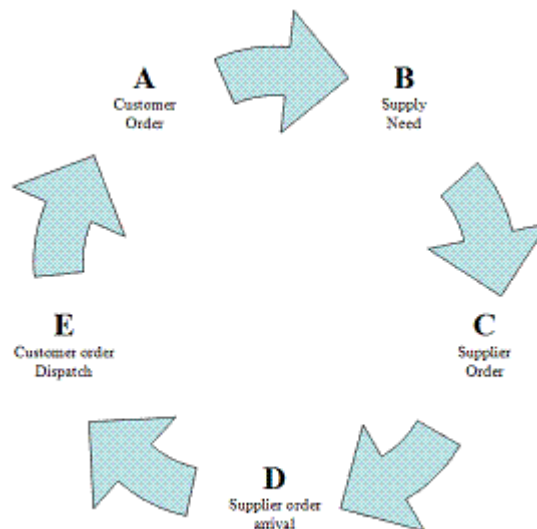
- Check in real time orders that can be dispatched and pending orders awaiting stock consolidation
- Select orders that can be processed during the day, partial shipment possible
- Mass invoices, delivery notes, and customer notify creation
- Picking list printing (printing of a document showing all 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)

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 : Purchase order**
 - 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
 - You can type (or not) buying price and forward direct your order by email (with attached PDF file) to your supplier
 - 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**
 - Deliveries allow you to update automatically stock
 - Arrived available products automatically update customer's pending orders (they can be now dispatched or not)
 - Supply needs are automatically updated
 - 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**
 - Check the list of orders ready for dispatch and orders with still missing products
 - Select the orders to be processed for the day (full or partial shipment) depending their supply needs status, payment status...etc
 - Print your « picking list » (list of products required to prepare orders)
 - Mass creation of invoices and delivery note with a simple click
 - System generates automatically chargeable weigh of the boxes (several methods available with also the possibility of putting your own parameters)
 - Export orders list towards forwarder's software and print your label
 - Import in Magento shipments tracking numbers from your forwarder's software
 - Mass notification of customer to advise their shipment dispatch and the option of goods follow up directly online

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



" The place for ecommerce management tools "

- 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

Installation

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

File copy

Before files upload, enable cache : this will prevent Magento to try to install extension before all files are uploaded.

Complete installation

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 some problems with the installation. Please note down the error and use our online forum (<http://www.maisondulogiciel.com/forum>) to get assistance.
- Refresh indexes (System > Index management)
- Disconnect and reconnect yourself from Magento's back office.

Then, you must initialize Embedded ERP caches :

- Initialize product availability statuses: Select menu ERP > Tools > product availability statuses and click on refresh button ; Warning : this can take up to 1 hour for 20 000 products
- Initialiser order preparation screen : select menu ERP > Order preparation > Prepare orders and click on refresh button

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

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.

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

Basic tests

To ensure that ERP is properly installed and works well, you can run the following tests :

Important notice : it is mandatory to have a working cron on your server to success this tests. If cron is not working on your server, you can run it manually with URL www.monsiteweb.com/cron.php. Do not hesitate to refresh this page several time.

- Create a simple product, without stock (0), allow back orders, set notify for quantity below to 0 and associate product to categories.
- Place an order containing this product
- After a few minute (delay required for cron execution), check that :
 - Order is visible in "ignored orders tab" in ERP > order preparation > prepare orders
 - Product is visible in ERP > Purchase > Supply needs
 - Then, go in ERP product sheet (ERP > products > [select product] > general tab > stock section : order quantity is 1
- Go back in order sheet and create invoice for order
- After a few minute (delay required for cron execution), order is visible in "stockless orders" in order preparation screen.
- Create a new supplier in erp > purchase > suppliers
- Then, go back in supply needs add a quantity to the product and create a new purchase order using mass action drop down menu.
- Once the new purchase order is created, fill an estimated date of delivery, change order status to "waiting for delivery" and save.
- After a few minute (delay required for cron execution), go back in supply needs : status must be "waiting for delivery".
- GO back in purchase order (using menu erp > purchase > purchase order", select "delivery" tab, click on button "all products are delivered" and save.
- After a few minute (delay required for cron execution), check that :
 - In ERP product sheet, "general" tab :
 - Product stock is 1
 - Available quantity is 0
 - Reserved quantity is 1
 - A new stock movement "supply" is visible in the table at the bottom of the page
 - In order preparation screen, order is now in "fullstock orders" tab
 - In supply needs, product is not visible anymore
- Then, go in ERP > order preparation > prepare orders :
 - Add order to selected orders using "select" link : order is now visible in "selected orders" tab
 - Click on "print picking list" button
 - Click on button "create invoice and shipment"
 - Click on notify button
 - After a few minute (delay required for cron execution), you should receive an email about order shipment.
 - Click on « finish » button
- After a few minute (delay required for cron execution) and go back to ERP product sheet :
 - Stock is 0, ordered quantity is 0, reserved quantity is 0
 - A new stock movement "shipment" is visible at the bottom of the screen

Settings

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.

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	Non
Decrease Stock When Order is Placed	Non

Cron

A proper CRON running is mandatory for ERP features : many heavy operations are performed by erp (stocks update, product reservation, cost updates ...). To avoid to slow user experience, many tasks are processed using background tasks. It means that some operation may take a few minutes to be processed. For more information about background task, please read "Miscellaneous" section.

Cron must be configured on your server, you must configure it for run every monutes to avoid update delay.

For more information about cron settings, please contact your hosting company.

Then, you can supervise cron's run with table "cron_schedule" : this table logs all cron execution with "executed_at" column. If your cron runs properly, you should see task executed every minutes.

ERP display a notice about the cron behavior at the top of the admin panel, you can disable it in system > configuration > background task.

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 menu ERP > Tools > BackgroundTask

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

Setting	Comment
Maximum execution time	defines the maximum execution time once. Generally matches with <code>php_max_execution_time</code> . 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.
Logs	Number of days while records are being saved.
Web manager email	If an error occurs, a email will be forwarded to this address.
Debug mode	If enabled, debug information are displayed in the html output when you manually execute cron (requesting url <code>www.mywebsite.com/cron.php</code>)
Store stack trace	If enabled, the stack trace for the method that scheduled the task is store. You can view task's stack trace from menu ERP > Tools > Background task > [Task]

Stocks

Stock Settings

Configuration items are available under menu System > Configuration > Advanced Stocks

General

Setting	Description
Validate payment when invoice is created	ERP adds a new tab in the sales order sheet to define if an order is paid. Enabling this option, the flag "Payment validated" is automatically set to true when an invoice is created. This is useful as many payment gateway automatically creates order's invoice when payment is accepted.
Replace inventory tab in the magento product page	If enable, the inventory tab of product page will be replaced by ERP's
Restore is in stock when product back in stock	Yes / no :
Disable product reindex	Apply only if you experience performance issues

Cron

Setting	Description
Show debug html output	If enabled, show debug informations when call manually the cron
Update order product stock max	Put a value to inform the number of order to be treated

Valid orders

ERP displays information to show if an order is valid or not. The goal is to put an alert on an order which are not paid or are signed as a threat.

An order with the qualifier "invalid" will undergo these things :

- In the order preparation page, the order will be displayed in the tab "ignored orders" to avoid the order preparator to treat them.
- For the supply needs, the system will display the necessary quantities for all orders and also for the valid orders.

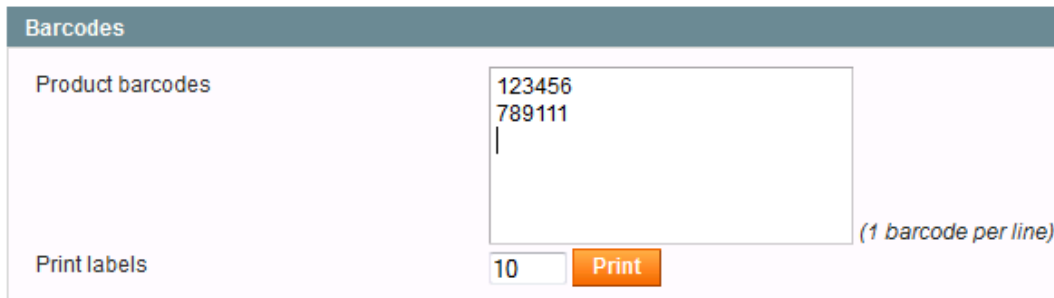
Setting	Description
---------	-------------

Require payment validated flag	Select yes to valid an order
Force order to valid if shipping method is	Choose the mode
Force order to valid if customer group is	Choose the mode
Exclude order with status	Choose e the type of orders to exclude
Update is_valid for all orders	When you change order validity conditions, after saving new conditions click on this button to update orders validity

Etiquette a code barre

ERP are managing barcode labels in products level, they is two way to use it. Rendez vous in a product page of ERP and click on the tab « barcode»

1. (by défaut) barcodes management by ERP, thos will manage their own barcodes that will fill in a multi line area, you can put several barcodes separated by a new line (the first will always being printed on the label).



The screenshot shows a 'Barcodes' section with a 'Product barcodes' label and a text input area containing two lines of text: '123456' and '789111'. Below the input area is a 'Print labels' label, a numeric input field with '10', and an orange 'Print' button. A note '(1 barcode per line)' is visible to the right of the input area.

2. If you already own a barcode management (like Barcode Label or an attribute like « ean » that you have created) then you can configure ERP to take care the existing barcodes (interface will change). To do that, choose the attribute that contain existing barcodes in the section section « barcodes», « barcode attribute ». (see next section)



The screenshot shows a 'Barcodes' section with a 'Product barcodes' label and a single-line text input field containing the barcode '000000002141'. Below the input field is a 'Print labels' label, a numeric input field with '10', and an orange 'Print' button.

Setting	Description
Row count	Enter a value
Labels per row	Enter a value
Paper height	Paper height in centimeter
Paper width	Paper width in centimeter
Top margin	[...]
Left margin	[...]
Right margin	[...]
Bottom margin	[...]
Vertical inter margin	[...]
Horizontal inter margin	Enter a margin in centimeter

barcodes

Setting	Description
Barcode attribute	Select the barcode attribute that you have created and which will contain the products barcode using by ERP. If you type nothing (by default) it's the ERP who will manage products barcodes (that you must fill in ERP product page)

Miscellaneous

You can show / hide additional informations like the size, color of a configurable product. this informations will being displayed in a new column « attribut » in the top of the ERP product page. This column are also visible in the supplier orders when adding products and also in the supply needs.

Sku	Name	Attributes	Buying Price		Sale price		Margin %		Stock Summary
			From:	To :	From:	To :	From:	To :	
n2610	Nokia 2610 Phone		\$20.00		\$149.99		86.67	Default : 0 / 0	
cn_3	CN Clogs Beach/Garden Clog	(Gender: Womens, Shoe Size: 3)	\$1.00		\$15.99		93.75	Default : 17 / 17	
asc_8	ASICS® Men's GEL-Kayano® XII	(Shoe Size: 8)	\$29.99		\$134.99		77.78	Default : 0 / 0	
steve_4	Steven by Steve Madden Pryme Pump	(Shoe Size: 4)	\$29.99		\$69.99		57.15	Default : 1 / 1	
nine_3	Nine West Women's Lucero Pump	(Shoe Size: 3)	\$29.99		\$89.99		66.67	Default : 3 / 3	

Setting	Description
Display configurable attributes	Yes / no : allow displaying attributes of configurable products (color, size, etc)

Sales history

You can read the history sales of a product that will display :

- The number of sales by period. Three period are configurable, you must fill the number of weeks for each other.

Sales History				
Updated at	Last 5 week(s)	Last 15 week(s)	Last 30 week(s)	Refresh
2012-08-03	0	1	1	<input type="button" value="Refresh"/>

- The ideal stock and the alert

Warning stock level / Ideal stock suggestions		
Warning stock level	Ideal stock	Apply
0	0	<input type="button" value="Apply"/>

- You have also a summary of product orders

All Orders

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

Reset Filter

Search

Id	Purchased On	Bill to Name	G.T. (Purchased)	Ordered Qty	Shipped Qty	Qty to ship	Reserved Qty	Valid	Status	Planning	Actions
100000060	Jun 25, 2012 11:27:49 AM	robert r	€105.00	1	1	0	0	Yes	Complete		

Setting	Description
Enable auto update (every sunday night)	Yes / no
Week number for period 1	Enter a value
Week number for period 2	[...]
Week number for period 3	[...]
Update for all products	Click on the button to activate

Router to associated orders to warehouse

Setting	Description
Priority	Select algorithm to select the warehouse to associate to sale order items
Default warehouse	Choose a warehouse

Warning stock level and ideal stock

Setting	Description
Ideal stock default value	Yes / no
Enable auto calculation	Enter a value
Calculate needed qty for X weeks	[...]
Formula	Enter a formula for the warning level

Substract X% to calculate warning stock level	Enter a value
Enable for Warehouses	Choose the warehouse

Stock errors verification

Setting	Description
Check stock, ordered qty, reserved qty	Yes / no
Check purchase values	Yes / no

Warehouses

Warehouse management New

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

Code	Name	Disable supply needs	Assignments
	Default	No	Main Website : sales Main Website : order_preparation Main Website : product_return Admin : order_preparation Admin : sales

Embedded ERP manages multi stocks and multi warehouses. It means that you can create several warehouses and assign a role (assignment) to each one

What we call "Stock" is the association between a product and a warehouse.

To manage warehouse, select menu ERP > Stock management > Warehouse

By default, only one warehouse exists: default warehouse.

To create a new warehouse, click on the "New" button in the upper left corner.

To edit a warehouse or consult warehouse's stocks, click on the default record.

Edit warehouse

Information

This tab summarize main information about the warehouse

Edit warehouse Back Reset Save

Name	Default
Code	main warehouse
Description	<div style="border: 1px solid #ccc; height: 40px;"></div>
Address	<div style="border: 1px solid #ccc; height: 40px;"></div>
Disable supply needs	<input type="checkbox"/>

Assignments

This part is very important !

With assignments, you can define the warehouse roles for the magento websites.

Basicly, 2 websites exists :

- Main website : default website for the front
- Admin : this website is used when you place order using magento back office form to create orders.

Each column matches to an assignment.

Edit warehouse Back Reset Save

Website	sales	product_return	order_preparation	RMA Reservation
Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Main Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The following assignments are available :

Assignment	Description
Sales	This is probably the more important assignment : saying that a warehouse fullfills "sales" assignment means that warehouse's stocks are available for sales for the current website : if a website contains several warehouses as "sales", the whole stocks will be available for sales. On the other hand, if a website has no warehouse for sales, all product wont be "out of stock".
Order Preparation	It's important to understand the difference between "sales" and

	"preparation" assignments : let's consider a company with a main warehouse but also a physical store with a few products. This company sells products both on its website but also in its physical store : in this configuration, we have 2 warehouses : the main one and the physical store. However, we want that twice stocks are saleable from internet : in this case, we'll assign "sales" assignment to the main website for each warehouse. However, as a website can have only one "preparation" warehouse, we'll affect the main warehouse to the "preparation" role. If a customer buys from the website a product that is located in the physical store only, the order will appear as "out of stock" as the system cant reserve product from the main warehouse. In this case, you have to create a stock movement from the "physical store warehouse" to the "main warehouse" in order to reserve product for the order and then prepare it.
Product reservation	Warehouse for the product reservation to refund to the customer

Products

This tab lists all product available in the warehouse

[Edit warehouse](#)

Page of 7 pages | View per page | Total 121 records found

sku	Name	Qty	Shelf Location
n2610	Nokia 2610 Phone	0.0000	
bb8100	BlackBerry 8100 Pearl	10.0000	
sw810i	Sony Ericsson W810i	58.0000	
8525PDA	AT&T 8525 PDA	7.0000	
MM-A900M	Samsung MM-A900M Ace	19.0000	
MA464LL/A	Apple MacBook Pro MA464LL/A 15.4" Notebook PC	220.0000	

Export

This tab allows you to export your products in the current filing. The information in this file are:

- manufacturer
- product id
- sku
- name
- cost
- quantity
- status

Notice : the generated file is not compatible with the "import".

Import

This tab allows you to import products in the current filing. To create your own import file proceed as follows:

1. create a file with the extension text or CSV you can name it like you want (example «import from main warehouse.txt)
2. copy / paste the sku of each product that you want to import like this :

; product sku ;; quantity in stock

Here an example of import file :

;bb8100;;123

;8525PDA;;456

These two lines contain respectively the reference and the quantity of each product. Separate out these two pieces of information by two semicolons, observe also the first character insertion ";"

Notice : the generated file is not compatible with the "export".

Router

With ERP, an order can be fulfilled from several warehouses : it is the sales order item that is associated to a warehouse. To know warehouse for each order item, go in "preparation" tab in order sheet.

To affect a warehouse to each order item, ERP use "router" : to configure router behavior, go in system > configuration > advanced stock > router :

Router to associate order items to warehouse	
Priority	Affect to favorite stock, Affect to warehouse havi [WEBSITE]
Default warehouse	Milano [WEBSITE]

If you use a single warehouse, you can pass this section and keep the default settings.

Default warehouse is the warehouse used if router is unable to find a warehouse matching to router priority.

With priority, you can set algorithm used to affect a warehouse to order item. Several conditions can be used :

- Favorite warehouse : for one product, favorite warehouse can be set in ERP product sheet.

- Warehouse having stock : match to a warehouse having an available quantity greater than 0
- Default warehouse : warehouse set below

Only warehouses having "preparation" assignment for order's website can be used

Product stock management

Stock information for a product are available with menu ERP > Products > [Select product] > Stocks tab

Stock settings

This section contains parameters to define stock behaviour for the current product. Those information are also available in the magento product sheet, inventory tab.

Stock settings		Supply Need Summary	
Manage stocks	Yes <input type="checkbox"/>	Use default :	Yes <input type="checkbox"/>
Backorders	Allow Qty Below 0 <input type="checkbox"/>	Use default :	No <input type="checkbox"/>
Is in stock	In stock <input type="checkbox"/>		
		Waiting for delivery :	0
		Manual supply need	0
		:	
		Min qty to purchase	0
		:	
		Max qty to purchase	1
		:	
		Status :	Prefered stock level

For every setting, you can choose to use the default magento configuration (set under system > configuration > product > inventory > Stock options) or set a custom value for this product

Settings	Description
manage stock	If set to false, product stock wont be managed : it means that this product will not have stocks movements, warehouses, supply needs ... It is important to disable stock management for bundle / configurable products.
Backorders	If set to false, your customer cant buy this product if the available qty is equal to 0.
Is in stock	You can manually prevent customers to sell this product setting is in stock parameter to "Out of stock"
default use : manage stock	Yes /no : select no to use your own criterion
Default use : allow back orders	[...]

Summary of supply needs

You can consult the status of the product supply needs.

setting	Description
Waiting for delivery	Show the number of pending products for delivery
Manual supply needs	Show the quantity for the manual supply needs of the product*
Minimum qty to order	Display the minimum quantity to order defined when product creation
Maximum qty to order	Display the minimum to order for bypassing the warning stock level to status « ideal stock level »
status	Product status « ideal stock », « sold out »

Notice : * to create manual supply needs on a product, go in a product page of ERP, click on the tab « purchase setting »

- Price
- Pending sales order
- Barcode
- Sales History
- Purchase Settings**
- Purchase Orders
- Suppliers
- Packaging
- Organizer (0)
- Out Of Stock Period
- Availability Status

Purchase Settings

Exclude from Supply Needs

Default Purchase Tax Rate [Default] ▼

Next Supply Date July 30, 2012

Waiting for delivery qty 9

Default Supply Delay 5 days

Refresh supply need Refresh

Manual Supply Need

Quantity to purchase

Comments

2 phone needed for commercial use.

Dead line 2012-08-23

Fill the form « manual supply need » informing the quantity, type comment if needed, you can also define a « dead line ».

Stock summary

This table summarizes all stock information for the current product

Note: one record is displayed per warehouse.

Stocks											
Name	Qty	Available Qty	Warning stock level	Ideal stock level	Ordered Qty	Reserved Qty	Needed Qty	Shelf Location	Favorite Warehouse	Status	Action
Default	0	0	<input style="width: 40px;" type="text" value="1"/> <input checked="" type="checkbox"/> Use default	<input style="width: 40px;" type="text" value="1"/> <input checked="" type="checkbox"/> Use default	Valid : 0 All : 0	0	Min : 0 Max : 1	<input style="width: 40px;" type="text"/>	<input type="radio"/>	Min qty	View

Setting	Description
---------	-------------

Name	Warehouse name
Quantity	Stock level for the product in the warehouse
Available qty	This information is very important : this is the qty that is available for sale in your stock. This value equal the stock level minus the qty to ship to pending orders. For example, if you have 3 units in stock. 2 customers purchased both 1 item. In this case, the available quantity is 1. Another important thing is that if you set product backorders to false, the system will prevent customer from purchasing product is available qty is 0
Prefered stock level	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
Ordered qty	It is the product quantity ordered in all customers's pending orders. Notice that 2 values are displayed : A (B). A is the quantity of this product in all sales orders while B is the quantity only for valid orders. (Valid orders criterias can be set in System > Configuration > Advanced stock)
Reserved qty	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	This is the stock (product / warehouse) status. There are 3 possible values <ul style="list-style-type: none"> • Ok: stock level is sufficient to fulfill every conditions (sales orders and prefered stock level) • Sales order : stock level is not sufficient to ship customer orders • Min Qty : stock level is not sufficient to reach prefered stock level
Ideal quantity	This is the amount necessary to satisfy the threshold and supply orders. This value reflects the actual stock of the product but not quantities awaiting delivery by your suppliers.

Stock Movements

Embedded ERP uses stock movement to calculate product stock. Each time stock level changes (increase or decrease) a new stock movement is/must be created.

Stock movements					
Page 1 of 1 pages View 20 per page Total 2 records found					
Reset Filter Search					
Date	From warehouse	To warehouse	Type	Qty	Description
Jul 6, 2012 5:33:00 AM	Default		order	1	Shipment for order #100000001
Jul 6, 2012 5:30:00 AM		Default	supply	1	Purchase Order #20120706BC2 from test_ERP_supplier

A stock movement contains several information :

- Source stock : this is the warehouse the product comes from. This value can be empty if the product comes from a warehouse that is not yours (from your supplier warehouse for example)
- Target stock : this is the warehouse the product goes to. This value can be empty if the product leave in a warehouse that is not yours (for example, if you ship a product to a customer, target warehouse is empty)
- Quantity : items quantity
- Description : stock movement description (required)

To create a new stock movement, go in the ERP product sheet, fill in fields and click on "Create" button

New stock movement					
From warehouse	To warehouse	Qty	Type	Description	Action
<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text" value="Adjustment"/>	<input type="text"/>	<input type="button" value="Create"/>

You can view all the product's stock movements using "Stock movement" tab to track product's stocks.

Be aware that some stock movement are automatically created by the system :

- When you create a new delivery for a purchase order
- When you ship a customer order (create a shipment)
- When you set a product back to stock from RMA extension

Sales history

This tab displays statistic about sales for this orders :

- Sales history : display sales for 3 time frames set in system > configuration (read configuration section for more information)
- All orders : displays very orders placed with this product
- Warning stock levels / ideal stock suggestions : display suggestions based on settings in system > configuration.

Sales Order

All screen and information mentioned in this page are available using Sales > Order > [Select order]

Margins

Margins information for the current sales order are available under the "Margin" tab.

Produit	Ordered qty	Coût unitaire	Prix unitaire	Marge totale	Marge totale %
Iphone	1	187,00 €	299,00 €	112,00 €	37.46 %
Nokia 6230	1	0,00 €	99,00 €	99,00 €	100.00 %
				211,00 €	53.02 %

Margins are calculated using product cost and sale price. Caution : product cost is stored when the order is placed and this value is not updated after. It means that if the cost information wasn't available when the customer placed its order, margin will be false.

Order Preparation

In this tab, you can track product reservation and shipments progress.

When a customer places an order, the system parses all products to check if it is available in stock. If so, product is reserved for this order, otherwise, a new supply need is created. In this way, the system knows if an order can be shipped (all products are reserved) or if products are missing.

In the "preparation" tab, you can get this information

Value	Description
This order doesn't belong to the selected orders	Means that this order is not being shipped by the logistic service
Order not completely shipped	There still products to ship
Order is valid	This order fulfill validation conditions (can be set in system > configuration > Advanced Stock)
Product reservation	Inform if the product has been reserved
Order is prepared from warehouse XXX	Inform about the warehouse from which this order is prepared. Product reservations are done only when this warehouse stock is available.

This tab also summarizes information for each product :

Information	Description
Comments	Free comments (you can print comments PDF using the print button)
Ordered qty	Quantity initially ordered by customer
Shipped qty	Quantity already shipped to the customer
Remains to ship	Quantity remaining to ship to customer
Reserved qty	Product quantity reserved for the order. It is only once all quantities are reserved that the order can be completely shipped
Warehouse	This is a warehouse from which order item will be shipped. Preparation warehouse is automatically set by router when order is placed.

Action	In this column, you can manually reserve or release product for one order. This is usefull if you wish to affect one product to another order. Caution, if you try to reserve a product that is not available, the system will cancel the operation.
--------	--

Payment

In this tab, you can set payment status

Payment status is defined using a boolean (true or false).

To properly manage payment status in magento using Embedded ERP, there are 2 possible ways :

- Automatic validation : common payment gateways in Magento create invoice when payment is accepted by the bank : Embedded ERP owns an option to automatically set the payment validated flag to true when an invoice is created (you can enable this option from system > configuration > advanced stock).
- Manuel validation : for other payment methods (cash, bank transfer, checks ...), you have to manually toggle the payment status. You apply set mass changes from the sales > order grid, checking orders and selecting "Validate payment" mass action.

Valid / Unvalid orders

With Embedded ERP, you can set criterias to define if an order is valid or not.

The idea is to flag invalid orders to manage them separately. Invalid orders can be not paid orders, fraud suspected etc...

The system applies custom processing on invalid orders :

- In the order preparation screen, invalid orders are displayed in the "Ignored orders" tab. Nevertheless, you can process them.
- In the supply needs grid, when you need to purchase product for sales order, the system displays both the quantity needed for all orders but also the quantity needed for only valid orders.

To define valid orders criterias, select menu System > Configuration > **ERP** > Advanced Stock > Valid orders :

Setting	Description
Require payment validated flag	If enabled, order's payment validated flag must be set to true to set the order valid
Force order to valid if shipping method is	Sélectionnez le(s) mode(s) de livraison(s) à appliquer pour forcer la validation
Force order to valid if customer group is	Sélectionnez le(s) groupe(s) de client(s) pour forcer la validation
Exclude order with status	Allow you to define the orders states which the status is set to X.

	This is useful for example to define as invalid the orders with suspected fraud status.
Exclude orders with status	Here, you can select statuses that make order invalid.
Update is_valid for all orders	If you change one of the criterias above, after saving, click on this button to refresh orders status.

Mass stock editor

In the menu « ERP » « stock management » « mass stock editor ». This page allow you to edit quickly the products stock and it's « mini » quantity, in fact the minimum qty in stock where under this value, a supply needs will be created.

Mass Stock Editor [Save](#)

Page 1 of 6 pages | View 20 per page | Total 105 records found [Reset Filter](#) [Search](#)

Manufacturer	Sku	Name	Warehouse	Stock	Warning stock level	Ideal stock level	Location	Action
				From: <input type="text"/> To: <input type="text"/>				
Nokia	n2610	Nokia 2610 Phone	Default	0	<input type="text"/> <input checked="" type="checkbox"/> Use default	<input type="text"/> <input checked="" type="checkbox"/> Use default		View
BlackBerry	bb8100	BlackBerry 8100 Pearl	Default	10	<input type="text"/> <input checked="" type="checkbox"/> Use default	<input type="text"/> <input checked="" type="checkbox"/> Use default		View
Sony	sw810i	Sony Ericsson W810i	Default	58	<input type="text"/> <input checked="" type="checkbox"/> Use default	<input type="text"/> <input checked="" type="checkbox"/> Use default		View
At&t	8525PDA	AT&T 8525 PDA	Default	7	<input type="text"/> <input checked="" type="checkbox"/> Use default	<input type="text"/> <input checked="" type="checkbox"/> Use default		View

To edit the quantity or minimum quantity mini, this the matching box and modify the values, the « Location » column display the physical location of the product in your warehouse. Onec the modification made click on the button « save » to apply.

Stock error

Menu « ERP » « stock management » « stock error ». The system identification errors was implemented to identify possible errors and correct stock.

To display stock errors, click on the button "refresh caches" :

Erreurs de stock [Rafraichir le cache](#)

Page 1 of 1 pages | Voir 20 per page | Total 1 records found [Reset Filter](#) [Search](#)

Sku	Produit	Dépot	Commentaires	Action
iphone	iphone	Default	Qte enregistré;e incorrecte (7 au lieu de 10),	Fix error

Each product is a product which displayed an error of stock. A description of the error is displayed in the "Comments" column. To correct an error automatically, click on the "Correct" link. In some cases, it is possible that an error is not correctable automatically. In this case you must go to the product page and correct it manually.

For example, if a command has reserved a product while the stock does not, you must go into the details of the order book and dice the product manually.

Sales history

The ERP can maintain product sales statistics to assist you in setting reorder points and other decision relating to historical sales : These statistics are available in the ERP product view and the product popup is accessible in the suply needs view and purchase order.

By default this fonctionality, is not activate, to allow it, rendez vous in system > configuration > advanced stock > sales history :

Sales History	
Enable auto update (every sunday night)	<input type="text" value="No"/> [GLOBAL]
Week number for period 1	<input type="text" value="5"/> [GLOBAL]
Week number for period 2	<input type="text" value="15"/> [GLOBAL]
Week number for period 3	<input type="text" value="30"/> [GLOBAL]
Update for all products	<input type="button" value="Update now"/> [GLOBAL]

- Enable auto update : if yes, ERP will update the sales statistics for each products every Sunday night.
- Nb of week for period X : enter the week number (in number of week previous of the current week) to define 3 sales period. If you type 5, 15, 30, ERP will up to date the statistics for the last 5 weeks, last 15 weeks, and 30 last weeks.
- Update now : allow to force manually the sales statistics.

Note: The sales history reflects only products invoiced and shipped.

SCANNER

Scann Configuration

display

settings	Description
Screen width	Type a value in pixel
Screen height	[...]

Remove scroll bars	Yes / no
Mobile user agent	Enter the name of the operating system of the mobile tool, which will allow to display the page to the adapted format

miscellaneous

settings	Description
Hide product row when qty reached	Yes / no
Postamble	Control character added at the end of a scann (most of time #)

Free delivery

settings	Description
Affect product to warehouse	Choose the warehouse
Stock movement caption	Enter a name
Prevent location change if product is in stock in another location	Yes / no

Purchase order

settings	Description
Scan location after scanning product	Yes / no

purchase

purchase configuration

Configuration are available in menu **System > Configuration > purchase**

PDF Options

Setting	Description
PDF Header Text	text displayed in the header prints PDF. It usually contains the address of your company
PDF Footer Text	Text in PDF footers. It usually contains legal information of your company
PDF Comment	This area contains free comments that will be displayed at the bottom of the PDF printing. You can put information on the consideration of the order by the supplier, for example

Configuration

Setting	Description
Purchase Order Carriers	List of carriers that will be usable in a purchase order. Each element must be separated by a comma.
Purchase Order Payment methods	Payment methods available in a purchase order. Each method must be separated by a comma

Supply needs

Setting	Description
Attribut de fabrication	Select manufacturer attribute

Notify supplier

Setting	Description
Email Sender	identity to use to send the email provider
Email Template	email template used to send the purchase order. You can change this email from the menu system> transactional email.
Copy To	emails sent to suppliers will also be sent to this address
Company name	Used in the subject of mail sent (orders XXX)

Purchase order

Setting	Description
Update the cost of the product from the order information providers.	If enabled, when a purchase order is completed, the purchase price with the cost approach is stored in the "cost" of the product datasheet
Store product cost	When purchase order is complete, update product cost in product sheet
Use product cost	When adding product to a purchase order, automatically fill price from the cost in product sheet
Cost Repartition Method	Define the way shipping costs are dispatched to calculate landing costs per product
Product default tax rate	tax rate to be used by default for the products in an order supplier
Default currency	default currency when creating a purchase order.
Default tax rate for Shipping	tax rate to be applied by default to freight a purchase order.
Manage Deee	If enabled, you can enter for each product a purchase order the amount of the eco tax (attention, it is not automatically carried over to the product for sale to customers)
Defect products warehouse	When you create a delivery from a supplier order, you can define to which repository should store the products. Here you can set the default repository.
Default warehouse for delivery	If enabled, informs receiving a defective product
Enable defect delivery	Yes / no

Display order notices	Display warning if PO doesnt fullfill supplier condition (minimum of order...)
-----------------------	--

Purchase product

Setting	Description
Default tax rate for Pricer	this is the tax used by the pricer wich are available in the purchase product page to calculate the VAT ratefrom the exclude tax total.
Default supply delay	Lead time for products default (can be customized later by product). This value is used to calculate the control schedules and availability display product
Check product / supplier association when adding product to purchase order	Prevents the addition of a product to a purchase order if it is not associated with the supplier

Purchase product grid

Setting	Description
Display product picture	If yes : display product image in the grid
Display last buy price	Yes / no
Display Weee	Yes / no
Display Discount	Yes / no
Display supplier sku	Yes / no
Display warning stock level	Yes / no
Display Subtotal	Yes / no
Display specific delivery date	If checked, adds a column informing the date of delivery from the supplier.

Remaining supply quantities

Setting	Description
Late severity low	Enter the number of days for an acceptable delay
Late severity medium	Enter the number of days to consider the delay of one command as disturbing

Packaging produits

Setting	Description
anable	If yes, the packaging for the produc twill being considarate

Barcode scanner for deliveries

Setting	Description
Scan location	If enabled, when receiving a product, scan location to know its location.

Manufacturer / supplier synchronization

When the supplier is also be a manufacturer, ERP synchronize data by creating the relevant supplier. (example: Sony (supplier) is also a manufacturer).

To synchronize your suppliers with your manufacturer, you must first create your manufacturers. Go in « catalog » , « attribute » , « manage attribute » and click on 'manufacturer', then click on the tab « manage label / options » and add a manufacturer by clicking on the button « add option » like this :

Manage Titles (Size, Color, etc.)			
Admin	English	French	German
Manufacturer			

Manage Options (values of your attribute)						
Admin	English	French	German	Position	Is Default	
Sony	Sony	Sony	Sony	1	<input type="radio"/>	<input type="button" value="+ Add Option"/>
helios	helios	helios	helios	0	<input checked="" type="radio"/>	<input type="button" value="Delete"/>

Here 2 manufacturers have been added, « helios » and « Sony ».

Once established manufacturers go into the details of a product through the menus : « catalog » , «manage product » , then fill the fields « manufacturer » by selecting the associated manufacturer like this :

Général	
Name *	Sony VAIO 11.1" Notebook PC
SKU *	Fixé VGN-TXN27N/BW
Manufacturer	Sony

Once the manufacturer saved go in « system », « configuration », « ERP », « purchase », section « supplier / manufacturer synchronization », select the manufacturer attribute (most of times 'manufacturer' then click on the button « synchronize now ».

Manufacturer / supplier synchronization	
Manufacturer attribute	manufacturer [GLOBAL]
Synchronize Manufacturers and suppliers	<input type="button" value="Synchronize now"/> [GLOBAL]
Enable auto synchronization	No [GLOBAL]
▲ If enabled, associate product to supplier based on the manufacturer	

Go back in « ERP », « purchase », « supplier », you will see some new supplier that will match with manufacturer of all concerned product.

Setting	Description
Manufacturer attribute	Enter the attribute corresponding to a manufacturer
Synchronize Manufacturers and suppliers	If enabled, when the manufacturer and the supplier are the same, ERP vendors will automatically created based on the list of manufacturers.
Enable auto synchronization	If enabled, new products are automatically associated with suppliers (suppliers / manufacturers, whether above).

Product sheet

To display product sheet, use menus ERP > Products and select a product

Pending Sales order

In this tab are displayed sales order to ship with the current product

Purchase Settings

This tabs contains all settings for the current product in purchasing processes

Settings	Description
Exclude from supply needs	If ticked, the product will never appear on the supply needs (useful for the article removed from range)
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.
Next date of supply	Displays the next date of supply for this product
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.
Refresh supply need	You can refresh supply needs for this product using this button.

Manual Supply needs

Please read "Supply needs" section to get more information about this.

Supply needs

This is a summary of the supply needs status for this product. For more information about this, please read the "Supply needs" section.

Purchase order

This tab lists all purchase order for this product. This is a good way to get a buy price history and compare suppliers

Suppliers

You can define here association between products and suppliers : when a supplier is associated to a product, it means that you can purchase this product to this supplier.

Associations can be created manually. But when you create a purchase order, if the association doesn't exist, the system will automatically create it.

Linking a product and a supplier will allow to :

- Filter supply needs per supplier
- When you select "Add product" tab in a purchase order, you can also filter list per supplier
- When the system calculate the product status availability, it uses the default supply delay for all suppliers linked to the product

Edit supplier / product association	
Supplier	test_erp_supplier
Supplier Reference	<input type="text"/>
Price Position	Unknown ▾
Last Unit Price (store currency)	0.00 USD
Last Unit Price (supplier currency)	0.00 USD
Last Price + cost	0.00 USD
Discount level	0.0000 %
Stock level	0
Dropship ?	No ▾
Is favorite supplier ?	No ▾
Supply delay	<input type="text"/>
Comments	<input type="text"/>
Save	Save

To associate a supplier with a product, select "Suppliers" tab, select the supplier in the drop down menu and click on the "edit" button.

When a product and a supplier are associated, you can define the following information : (use "edit" link to view/edit)

Setting	Description
Supplier reference	If the supplier product's reference is different from your SKU, you can fill it here. Once it's done, when you create or print a Purchase Order, this is this reference that is displayed.
Price position	Information to define supplier price position for this product
Last unit price (store currency)	Enter a value
Last unit price (supplier currency)	Enter a value (ERP manages it automatically)
Last price + cost	This is the unit price + landing / tax costs for the last purchase order. This is the REAL cost for the product
Discount level	Enter a value in percentage
Stock level	[...]
Dropship ?	Yes / no
Is favorite supplier	Yes / no
Supply delay	Enter a value in day
Comments	Free comments

Supply Needs

Supply Needs List

To display supply needs list, use menus ERP > Purchasing > Supply needs

This list contains products having :

- Stock level below the preferred stock level (Preferred Stock level can be set in system > configuration > inventory) or per product in ERP > Products > [select product] > Purchase settings
- Stock level is not sufficient to ship sales order
- Have a manual suppli need (can be set from ERP > Products > [select product] > Purchase settings

Supply Needs Stats Create Purchase Order:

Page of 1 pages | View per page | Total 17 records found Reset Filter Search

Manufacturer	SKU	Name	Status	Details	Qty	Qty for PO	Waiting for delivery	Suppliers	Action
							From: <input type="text"/> To: <input type="text"/>		
	n2610	Nokia 2610 Phone	Preferred stock level		Min : 0 - Max : 1 (0)	<input type="text" value=""/> <input type="button" value="min"/> <input type="button" value="max"/>		0 test_ERP_supplier : \$0.00 (0)	View
	ken_10	Kenneth Cole New York Men's Con-verge Slip-on	Preferred stock level		Min : 0 - Max : 1 (0)	<input type="text" value=""/> <input type="button" value="min"/> <input type="button" value="max"/>		0	View

Columns :

- **Manufacturer** : magento manufacturer
- **Description** : Product description (name)
- **Status** : this is the supply need status. There are 3 possible values :
 - Sales Orer : you need to purchase this product to complete sales orders
 - Min qty : stock level is below the prefered stock level
 - Pending Supply : you are waiting for a purchase order delivery that fulfill supply needs. Once the delivery is created, the supply need will be automatically deleted.
- **Details** : To get more information about the supply need, click on the "Light" picture to open a popup window that summarizes product information. To get more information about this windows, please read "Stock status popup" below
- **Needed Qty** : Quantity to purchase to complete supply need. Notice that 2 values are displayed : "Min , Max"
 - Min : is the qty to purchase to complete all product needs (sales order, prefered stock level, manual supply need)
 - Max : is the MINIMUM qty to purchase : it is the qty needed to ship valid sales orders.
- **Suppliers** : Suppliers associated to the product. You can filter this column to know all product you have to purchase for one supplier.
- **Supplier** : indicates the name of the supplier with the amount of order
- **Waiting for delivery** : indicates number of products waiting for delivery

When a purchase order delivery is created and stock level becomes sufficient, supply need is automatically removed.

Manual supply need

If you wish to manually raise a supply need (because you need to purchase a product for other reasons), you can create a manual supply need from menu ERP > Products > [select product] > Purchase settings.

Manual Supply Need

Quantity to purchase	<input type="text"/>
Comments	<input type="text"/>
Dead line	<input type="text"/> 

You can fill in quantity, expected date (used to define dead line in supply needs) and a free comment.

Once information is saved, the cron will refresh supply needs within the next minutes.

Stock status popup

This popup window is available clicking on the "light" button from a purchase order or supply needs grid

It is designed to summarize stock / purchasing information for product

Nom	Qte	Qte disponible	Seuil de réappro	Qte commandée	Qte nécessaire	Status
Default	0	0	10	3	13 (3)	Commande client

Qte totale nécessaire : 13
Qte nécessaire pour les commandes valides : 3
Besoin d'appro manuel : 0
En attente de livraison :
Status : Commande client

Stocks tab

This tab displays product's stocks summary for each warehouse. It is important to understand that supply needs status depends of the different stocks statuses. For each warehouse, the table displays :

- **Quantity** : This is the stock level
- **Available qty** : quantity available for sales.
- **Preferred stock level** : when the available quantity goes below this limit, a supply need is created
- **Ordered quantity** : product quantity to ship to customers
- **Needed qty** : quantity to purchase
- **Status** : stock status.

Information under the table summarizes information used to calculate supply need :

- **Needed Qty (all)** : quantity to purchase to fulfill all conditions :
 - Valid sales order
 - Not valid sales orders
 - Preferred stock levels
 - Manual supply needs
- **Needed qty (valid orders)** : this is the minimum quantity you have to purchase to ship valid orders
- **Manual supply need** : quantity filled for the manual supply need

- **Waiting for delivery** : expected inbound from purchase order having status set to "Waiting for delivery"
- **Status** : Supply need status

Sales order

Contains all sales order to ship that contain this product.

Purchase Order

Contains all purchase orders

View product

Click on this tab to go to the ERP product sheet

Create purchase order from supply needs

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

Purchase Order

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.
- Using the field "qty for PO" enter the amount needed (you can click on the button "min" and "max.")

Then use the dropdown menu "mass action" at the top of the list, select the provider partner, then click "Create a Purchase Order" : a new order will be created and selected products will be added automatically.

Order Information

This information is available under the "Summary" tab

Purchase Order #20120710BC1 (test_ERP_supplier)

General	
Id	20120710BC1
Order Date	2012-07-10
Estimated time of arrival	2012-07-10
Payment Type	Carte bancaire
Supplier	test_ERP_supplier test_ERP_supplier
Comments	<input type="text"/>
Target warehouse	Default
Currency	Euro
Currency Change Rate	1.0000 (1 USD = X EUR)
Tax Rate	0.00 % (For shipping and zoll costs)
Shipping Cost	0.00 EUR (0.00 USD)
Taxes and Duties	0.00 EUR (0.00 USD)
Carrier	Calberson
Status	Complete
Delivery Progress	100%

Total €0.00
Total (incl tax)€0.00

List of buttons and functionality:

- Print: print (if magento customer computer is installed) or download the PDF of the order
- Import supply need : click this button to open a new tab in your browser to add items to the purchase order (enter a value for this field of the quantity / product(s) then click "import selected products to order "
- Scanner delivery : scanner products supplied to validate the delivery
- Export : export the purchase order into a CSV file
- delete : delete the PO
- Save : apply change

Content of the tab

Setting	Description
Id	Order reference generated automatically. However, you can edit it.
Order date	Creation date
Delivery date	This is the estimated delivery date for products. This date is very important because the system uses it to display product availability statuses and calculate sales order planning. It is important to keep this date up to date if you know it has changed. In the ERP product sheet (ERP > products > [Select product] > Purchase settings), this date is displayed if the product belongs to the purchase order.
Supplier	Supplier to which you place order
Currency	Currency to use for this order. The default currency can be set in System > Configuration > Purchase module > Purchase order. If you select a different currency of you website base currency, the ERP will store products prices, shipping costs etc... using both currencies. You can set the currency change rate below.
Tax rate	Tax rate to use for shipping costs. You can also set a default value for futures purchase orders in System > Configuration > Purchase module > Purchase order

Shipping costs	Shipping costs (excluding taxes)
Taxes and Duties	Additional costs
Status	Please read "Status" section below"
Delivery progress	Percentage of delivered products
Total	Purchase order total (excluding taxes)
Total (incl tax)	Purchase order total (including taxes)

Accounting Tab

Fill here accounting information

Order statuses

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.
- **Waiting for payment :** select this status to indicate that the order has not been paid, in this case it is not taken into account by the system to calculate supply needs.
- **Waiting for supplier :** informs you of the status of the order followed in this case it is not taken into account by the system to calculate supply needs.
- **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:
 - 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.
 - Product costs appear automatically in the product sheet (with absorption costs).
 - Last product buying price with this supplier goes in the records.
 - Product quantities not delivered will not appear in the supply needs list.

Product addition

Adding "Manually" a product

Click on the button « Add Product », a new capture section will appear-insert the required quantity, capture all date and click on "save":

Notice : when you add products to a purchase order, depending of parameters set in System > Configuration Purchase Module, unit buy price can be filled automatically.




From Supply Needs

click on the button « « Import from Supply Needs » » on the top of the order: at this moment, **then** insert the quantity 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.

Notice : when you add products to a purchase order, depending of parameters set in System > Configuration Purchase Module, unit buy price can be filled automatically.

Product information

Page 1 of 1 pages | View 20 per page | Total 4 records found [Reset Filter](#) [Search](#)

Details	SKU	Product	Supplier SKU	Qty	Delivered Qty	Buying Price (EUR)	Discount %	Sale Price (USD)	Tax Rate (%)	Delivery Date	Delete
	n2610	Nokia 2610 Phone		1	0	0.0000 0.00	0.0000 %	149.99 100%	0.00		<input type="checkbox"/>
	ink_sm	Ink Eater: Krylon Bombear Destroyed Tee		1	0	0.0000 0.00	0.0000 %	22 100%	0.00		<input type="checkbox"/>
	1111	Ottoman		1	0	0.0000 0.00	0.0000 %	299.99 100%	0.00		<input type="checkbox"/>

Purchase order's products are in the "Products" Tab :

Column	Description
Picture	Product picture
Details	To get more information about the product stock status, sales order and purchase orders, click on the "Light" button. To get more information about this popup, please read "Product stock popup" in "Supply needs" help.
SKU	Product's SKU
Description	Product name; you can customize this (for example if you need to translate it)
Supplier reference	If the supplier reference is different from your sku, you can fill here the supplier reference. This Once purchase order status is set to "Complete", supplier reference is automatically saved in product/supplier association (visible in ERP product sheet). The next time you'll place a purchase order for this product/supplier, this information will be automatically filled.
Qty	Product's qty to purchase
Delivered qty	Qty already received
Buy price	Unit buy price. Under this field, the "real" buy price is displayed including landing costs.
Sale price	Product sale price (excluding taxes). Under this value is displayed the margin. Notice : you can directly edit product price using the pencil button.
Product tax rate	This value is automatically filled using parameter System > Configuration > Purchase module > Purchase order > Product default tax rate
Total (excl tax)	Row total
Delete	To remove a product, check this checkbox and click on save button.

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).

Create New delivery

Date [Print barcode sheet](#)

Target warehouse [All products delivered](#)

Page of 1 pages | View per page | Total 4 records found [Reset Filter](#) [Search](#)

	SKU	product	Qty	Defect qty	Ordered Qty	Delivered Qty	Remaining	Barcode	Serials	Location
	n2610	Nokia 2610 Phone	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="0x"/>	<input type="text"/>
	ink_sm	Ink Eater: Krylon Bombear Destroyed Tee	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="0x"/>	<input type="text"/>
	1111	Ottoman	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="0x"/>	<input type="text"/>
	oc_lrg	The Only Children: Paisley T-Shirt	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="0x"/>	<input type="text"/>

Deliveries

Date	Product	Warehouse	Qty	Description
------	---------	-----------	-----	-------------

To create a new delivery, select "Delivery" tab and follow these steps :

- For each product, fill in the product qty. If you know that all products are delivered, click on "All products delivered" button
- Fill in reception date (if different from today)
- Select the target warehouse : this setting is very important as it will increase product stock level in this warehouse. Note that you can set the default warehouse from System > Configuration > Purchase module > Purchase order
- If you wish, you can also fill in products barcode. If product barcode already exists, it is displayed above

Once all information is filled in, click on the save button.

If all products are delivered, the system will automatically set order status to "Complete" you can click on the button "all product delivered"

When you create a new delivery, the system creates stock movement (visible for each product in ERP product sheet, tab "Stock movement". To avoid interface overload, stock are updated using

background task. It means that stock level, product reservation may need a few minutes to be updated. You can track background task execution using menu ERP > Tools > Background task.

Tracking number

This page gives you access to products whose serial number has been informed
Available information is the product number, name and serial number.

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.

Send order to supplier

Fill comments and click button to send order to supplier by email
Supplier email address : **Caution : supplier email is not set !**

Change status to :

Do not change status
 Waiting for supplier
 Waiting for delivery

Send to supplier

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.

You can also change the status when sending email provider by selecting the new status below the text box. Three status:

- unchanged (keeps the same status)
- waiting for supplier : (does not change supply needs)
- waiting for delivery : (taking into account the needs of supply)

Organizer (tâches)

Organizer + Show / Hide New Task

Entity	PO #20120706BC1			Created at		<input type="button" value="Save"/>
Author	admin	Notification Date	2012-07-1	Priority	1	
Target	<input type="button" value="Notify"/>	Dead line	2012-07-1	Complete	<input type="checkbox"/>	
Caption	delivery tracking					
Description	Does the supplier have sent an email for sending merchandise : yes how long before reception : he said 5 day => to do : call him in 3 day to check this.					

Page 1 of 1 pages | View 20 per page | Total 0 records found

Id	Entity	Date	Author	Target	Caption	Deadline	Misc	Action
		From: <input type="text"/>	<input type="text"/>	<input type="text"/>		From: <input type="text"/>		
		To: <input type="text"/>				To: <input type="text"/>		
No items								

Find your notes in this tab of tasks between users.

To add a note, click the "show / hide", then fill in the fields:

- autor : yourself
- target : the recipient
- Caption : subject of the message
- description : contenu de the message
- notification date : creation date
- dead line : life time of the message
- priority : propriety level
- complete : tick the box if complete

You can also find answers and exchange of the current task in the summary. (under the addition of new task).

PDF printing

You can print Purchase Order PDF using "Print" button.

Note that you can customize :

- Header and footer text using menu System > Configuration > Purchase Module > PDF Options

- Your address (Displayed on the left) from System > Configuration > Sales > Invoice and shipmentdesign > Address

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.

Packaging for Purchase Order

With this feature, you can purchase products to supplier using packaging : for example, if you sell wine bottle, your supplier may require you to buy carton bottles (6 units)

Warning, this feature is disabled by default : to enable it, select menu System > Configuration > Purchase module > packaging and enable it

It is important to understand that the packaging feature is "just" a way to place purchase order, anyway, ERP will consider the unit quantity



Product packaging	
Enable	Yes [GLOBAL]
	Yes
	No

Create packaging

You can create packaging from the ERP product sheet (menu ERP > Product) using "Packaging tab".

apple iphone (iphone) Back Reset Force Stocks Update View product Save

Packaging				
Name	Qty	Default for sales	Default for purchase	Delete
None	1	<input checked="" type="radio"/>	<input type="radio"/>	
<input type="text" value="Carton"/>	<input type="text" value="6"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
Add new packaging				
<input type="text"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	

For each packaging, you can set :

- **Name** : packaging name
- **Qty** : how many units contains packaging
- **Default for sale** : If checked, this packaging is used to convert purchase unit in sales unit
- **Default for purchase** : If checked, this packaging is used by default for purchase order.

To create a new packaging, fill fields in the last row and click on "save" button

If you see this :

An error occurred : **SQLSTATE[42S22]: Column not found: 1054 Unknown column 'exclude_from_supply_needs' in 'field list'**

You must refresh the index Magento via the menu **System > Index Management**, select all, then click "reindex data"

To Delete a packaging, tick "delete" checkbox and click on "save" button

How to use packaging in Purchase Order

Enabling packaging feature, a new column is displayed in the PO products list :

Qty	Packaging
<input type="text" value="1"/>	<input type="text" value="Carton (6x)"/> Total : 6
<input type="text" value="1"/>	<input type="text" value="None"/> Total : 1

With the drop down menu, you can select packaging to use in this purchase order for this product. If you don't want to use a packaging, select "none" option

If a packaging is selected, the quantity field contains the number of packaging to purchase : to know the total number of unit that you purchase, you need to multiply it with the packaging unit count. Hopefully, ERP displays the final number of units under the drop down menu

Supply needs

Enabling the packaging feature doesn't change the supply needs list. However, if you import supply needs in a PO or if you create a PO from supply needs, the system will automatically convert the number unit into packaging count : for example, if supply need quantity is 4, the system will add 1 carton (6 units) in your purchase order

Miscellaneous

Suppliers management

You can display suppliers list using menu ERP > Purchasing > Suppliers

To edit a supplier, click on the record. To create a new supplier, use the "New" button in the upper right corner.

Edit supplier

Résumé

- Divers
- Fabricants
- Commandes
- Contacts
- Organizer (0)

MDL

Retour Reset Enregistrer

General

Id: 1

Nom:

Contact principal:

Adresse 1:

Adresse 2:

Code postal Website*:

Ville:

Pays:

Téléphone:

Fax:

Email:

Site:

Commentaires:

Supplier information is dispatched in 5 tabs :

Tab	Description
Summary	Summarizes supplier information such as its name, address... Address is printed in the Purchase Order PDF. Email address is used when you notify supplier from the Purchase Order screen.
Miscellaneous	Supply delay is used to calculate product

	availability status. For more information, please read "Product availability status" chapter
product	Lists the products the supplier. This association is purely informative and not subject to further treatment.
Orders	List every purchase order for this supplier
Contacts	Contains supplier's contacts
Organiser	Displays a list of current tasks and exchanges of notes

Contacts management

You can manage supplier's contacts withing Embedded ERP.

To list, add or edit contacts, select menu ERP > Purchasing > Supplier > [Select supplier] > Contacts tab

You can list all contacts from ERP > Purchasing > Contacts

Tax rates

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.

Order Preparation

Order Preparation Settings

Logistics extension configuration is done via BackOffice, System Menu > configuration > 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

Main

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

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.

Printing options

Setting	Description
Print 2x invoices without tax	If enabled, customers invoices will be printed 2x if order does not have any tax
Print invoices 2x if payment method is	This part allows you to print 2x customer invoices depending on payment method
Print invoices on print document	If enabled, invoices are added to the PDF that you can

button	download using "Download documents" button
Print shipments on print document button	If enabled, shipments are added to the PDF that you can download using "Download documents" button
Print Comments	If enabled, comments (organizers) are added to the PDF that you can download using "Download documents" button
print packing slip	If enabled, allow to print all products inside a packing

Order preparation steps

In this section, you can customize header buttons in order preparation screen.

Displayed buttons depends of the selected operation mode (manual or optimized). For more information, please select "Prepare orders" help

Setting	Description
Mode	« Mass » or « order per order »
Print method	« download PDF » or « sending to printers » (Magento Client Computer needed)
Display create shipments button	yes / no

Packing

Add packing step	<input type="text" value="Yes"/>	<input type="button" value="v"/>	[GLOBAL]
Create shipment on commit	<input type="text" value="Yes"/>	<input type="button" value="v"/>	[GLOBAL]

Packing

Step Packing allows you to prepare in order to scan an order for shipment to do to get a list of related products.

To proceed follow this steps :

1. Enable **system> configuration> order preparation > Printing options>** insert the correct preparation
2. Desable **system> configuration> order preparation > show print shipment button**
3. To prepare orders, follow this steps :
 - Select the orders
 - Print the documents
 - In the packing section, scann the bar code of the order, scann the products once all products has been scanned, click on the buton " validate packing" : this will create the shipment for the current order.

Paramètre	Description
Add Packing step	Yes / no
Create shipping and invoices	Yes / no : allow to create directly the shipment and the invoices

Mode order per order

Paramètre	Description
Create shipment and invoice	Yes / no
Send the documents to the printer	Yes / no
download documents	Yes / no
Select the next order	Yes / no
Print shipping label	Yes / no

miscellaneous

Paramètre	Description
Show client computer download link	Use only if the web site is a demonstration environment
Capture invoices	yes / no
print comments	If enabled, comments placed in the organizer controls selected will be displayed above the list of selected commands
Create invoices	yes / no
Default page size	Sets the number of commands displayed per page for page tabs order preparation

Liste de préparation

Paramètre	Description
Display product without stock	Yes / no

management	
Sort mode	manufacturer / product location
Display sub products	yes / no

UPS

Paramètre	Description
Description of good	enter description
Billing Option	Enter invoice option separated by a comma
Enabled COD	yes / no

Fedex

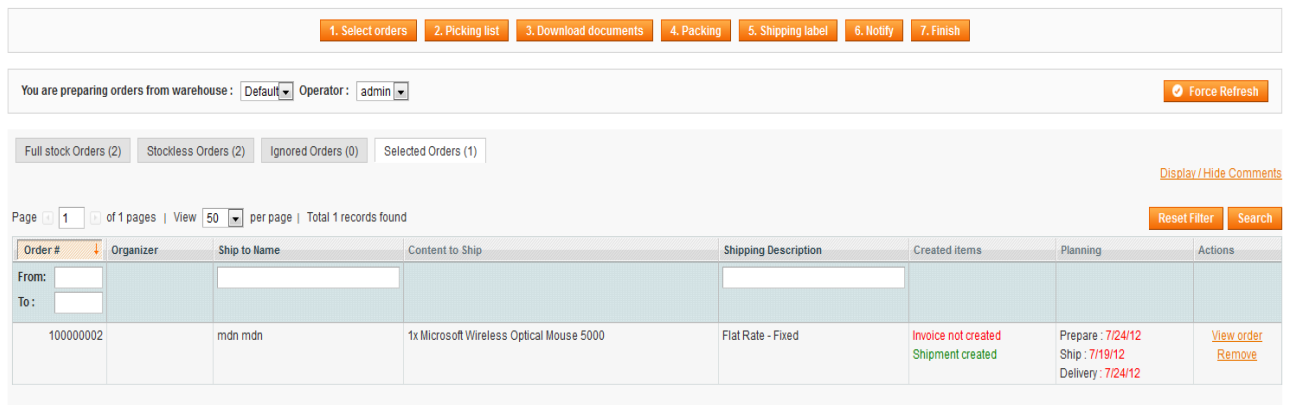
Paramètre	Description
Shipper name	Enter the name
Shipper address 1	address (1st part)
Shipper address 2	address (2 nd part)
Shipper City	Choose the city
Shipper state	choose
Shipper postal code	Postal code
Currency	Enter the currency
Weight type	Type of weight (kg, livers)
Packaging type	Enter the packing type
Service type	Enter the service type

Exaprint

Paramètre	Description
-----------	-------------

Telephone	Enter the telephone number
Comment	Type a comment
Email	Email address
Mobile	Cellular phone number
Country code	Type the country code
street	Enter the street name
Complement of address	Type if needed
Zip code	Zip code
city	Enter the city
sender	Name of the sender

In the page picking ERP> Preparation of orders> prepare orders, you will get the following page:



The screenshot shows the 'prepare orders' interface. At the top, there is a progress bar with steps: 1. Select orders, 2. Picking list, 3. Download documents, 4. Packing, 5. Shipping label, 6. Notify, 7. Finish. Below this, there are dropdowns for 'You are preparing orders from warehouse' (Default) and 'Operator' (admin), along with a 'Force Refresh' button. A summary bar shows: Full stock Orders (2), Stockless Orders (2), Ignored Orders (0), and Selected Orders (1). There are also links for 'Display / Hide Comments', 'Reset Filter', and 'Search'. The main table has columns: Order #, Organizer, Ship to Name, Content to Ship, Shipping Description, Created items, Planning, and Actions. One order is listed with Order # 100000002, Ship to Name 'mdn mdn', Content to Ship '1x Microsoft Wireless Optical Mouse 5000', Shipping Description 'Flat Rate - Fixed', and Planning dates: Prepare: 7/24/12, Ship: 7/19/12, Delivery: 7/24/12. The 'Created items' column shows 'Invoice not created' and 'Shipment created'. The 'Actions' column has 'View order' and 'Remove' links.

Commit button Actions

In this section, you can define what action are performed by the commit button (available within "Process orders" step.

Settings	Description
Select orders	In fullstock orders, click the link "select"
Preparation list	Click on "picking list" to print the list of products to be shipped
Create invoices and shipments	Create shipment and invoice for the current order

Print documents	Send invoice and delivery note to your printer (requires Magento Client Computer)
Print / download shipping label	Print shipping label (requires Magento Client Computer)
Select next order	Display next order to process
Notify	Send an email to the customer to inform them of the shipment of the order
finish	Terminate the process

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.

Template list

You can display carrier template list using menu ERP > Order preparation > Carrier templates

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.

Create Carrier Template Save

Name:

Import Carrier Template Save

File: Aucun f... choisi

Edit template

Template edition screen contains 3 parts :

- Main information

Template information	
Name	Fedex
Associated Shipping Method	Federal Express
Type	Fedex Ship Manager
Client directory name	directory_
Tracking label	Tracking

- Export file description (contains shipping information to print shipping labels)

Export file (Magento to carrier software)	
File name	fedex
Witness File name	fedex
File Format	fixed
Field Separator	none
Field Delimiter	none
Line end	\n
Add header line	<input checked="" type="checkbox"/>
Custom header	fedex carrier
Remove accent	<input type="checkbox"/>

Position	Name	Size	Content	Format	Format argument	Delete
Add New Field						

- Import file description (contains tracking numbers to import in Magento)

Once the model is created carrier will be available in the link to download the commands in step preparation of export order.

Template definition (ups, fedex, expack ...)

To use a pre-formatted, select the menu System> Models carrier "and click" New. One time on the editing of the model,

- Select the type (ups, fedex)
- Select the shipping method

Informations du modèle	
Nom	<input type="text" value="UPS"/>
Méthode de livraison associée	<input type="text" value="Flat Rate"/>
Type	<input type="text" value="Ups Worldship"/>
Code du répertoire client	<input type="text" value="directory_"/>
Libellé pour les numéros de suivi	<input type="text" value="Tracking"/>

Click "Save", then click "Export" to save the export file associated with your model. The download link commands in the correct format will be available in the stage of preparation of export control. (see picture)

Orders shipping settings

Order id	Shipment id	Shipping Name	Shipping Method	Weight
100000002	100000002	mdn mdn	Flat Rate - Fixed	<input type="text" value="5.00"/>
300000002		mdn mdn	Flat Rate - Fixed	<input type="text" value="0.00"/>
100000003		ACOMPTEA - meghit karima	Flat Rate	<input type="text" value="0.00"/>

Download order list for shipping Software

[Download for Fedex](#)
[Download for UPS](#)

Import tracking file

Shipping Software	<input type="text"/>
File	<input type="text"/> <input type="button" value="Browse..."/>

Template information

Export file (Magento to carrier software)

File name:

Witness File name:

File Format:

Field Separator:

Field Delimiter:

Line end:

Add header line:

Custom header:

Remove accent:

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

Setting	Description
Name	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.
Associated shipping method	Méthode d'expédition associée. Cette information est importante car elle permettra au système d'exporter les bonnes commandes vers le logiciel transporteur (c'est-à-dire les commandes utilisant cette méthode de transport)
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)

Export file

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

Export file (Magento to carrier software)

File name:

Witness File name:

File Format:

Field Separator:

Field Delimiter:

Line end:

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"/>

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.

Field's descriptions

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	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.

	<p>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. • 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
Format argument	
Delete	To delete a row, check this checkbox and click on save button

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.

Import file (Carrier software to Magento)

File Format:

Field Separator:

Field Delimiter:

Skip first record:

Position	Name	Size	Content	Delete
<input type="text" value="0"/>	<input type="text" value="Tracking"/>	<input type="text" value="0"/>	<input type="text" value="Tracking"/>	<input type="checkbox"/>
<input type="text" value="1"/>	<input type="text" value="Destinataire"/>	<input type="text" value="0"/>	<input type="text" value="Not used"/>	<input type="checkbox"/>
<input type="text" value="2"/>	<input type="text" value="Shipment"/>	<input type="text" value="0"/>	<input type="text" value="Shipment"/>	<input type="checkbox"/>
Add New Field				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Not used"/>	<input type="checkbox"/>

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)
Position	Column position
Name	Column name (used to build file header and used as caption for custom values)
Size	Column max size
Content	<p>Defines field content. This information is used by the system to import correct information. 3 values are available for each field:</p> <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

Order preparation

You can display order preparation screens using menu ERP > Order Preparation > Prepare orders

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.

Order preparation supports multiple warehouses and multiple operators :

You are preparing orders from warehouse : Operator :

Regarding multiple operator, it means that 2 operators can work simultaneously on order preparation screen. You can change operator using the drop down menu. By default, current user is used. Each operator will work with his own orders in selected orders and then, will have print picking list and prepare orders visible in his selected orders tab. An order can be prepared by only one operator.

For multiple warehouse, you must choose the warehouse from which you prepare orders. An order can be prepared from multiple warehouse as it is the order item that are affected to warehouse. Selecting a warehouse in order preparation, you will see only orders having at least one product prepared from the current warehouse. In this way, an order can be partially displayed in several warehouse scopes. To get more information about association between warehouse and orders, read "router" section.

There are 2 ways to prepare orders in Embedded ERP :

- Optimized way
- Manual way

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

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

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.

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 of 1 pages | View 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"/>		<input type="text"/>		<input type="text"/>			
100000090	Zimmermann olivier ()	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 ()	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 ()	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 :

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.

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.

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.

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.

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.

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.

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.

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.

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>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) <i>1x ASICS® Men's GEL-Kayano® XII</i></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) <i>1x ASICS® Men's GEL-Kayano® XII</i>	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) <i>1x ASICS® Men's GEL-Kayano® XII</i>	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

Manual mode

In manual mode, use this screen to

- Change product's quantity to ship
- Fill shipping information (services, weight)

Then, click on "save" button

Optimized mode

In optimized mode, use this screen to

- Change product's quantity to ship
- Fill shipping information (services, weight)
- Print invoice and delivery note
- Print shipping label
- Select next order

Once information are set, click on save button.

Packing

Step Packaging allows you in order picking, scanning a command to be shipped into order to find a list of related products.

Note: By default this option is disabled, to enable please refer to the configuration section and then proceeded as follows:



1. Enable it in **system > configuration > order preparation > print options > insert preparation PDF**
2. Desable option **system > configuration > order preparation > order preparation steps > show button print shipment**

To prepare the orders, follow this steps :

- Select the order
- Print documents
- In the packing section :
- Scann the order barcode,

1. Select orders	2. Picking list	3. Download documents	4. Packing	5. Shipping label	6. Notify	7. Finish
Scan order to Pack					10000002	

- Scan products :

1. Select orders	2. Picking list	3. Download documents	4. Packing	5. Shipping label	6. Notify	7. Finish
Please scan products			Microsoft Wireless Optical Mouse 5000 scanned			
Order #10000002						
	Image	Sku	Name	Qty to ship	Qty scanned	Qty to scan
		micronmouse5000	Microsoft Wireless Optical Mouse 5000	1	1	0
COMMIT PACKAGING				CANCEL		

- Once all products has been scanned, click on the buton " validate packing" : this will create the shipment for the current order.

Shipping label

1. Select orders2. Picking list3. Download documents4. Packing5. Shipping label6. Notify7. Finish

Orders shipping settings [Save](#)

Order id	Shipment id	Shipping Name	Shipping Method	Weight	Tracking number	Additional information
100000002	100000002	mdn mdn	Flat Rate - Fixed	<input type="text" value="0.00"/>	<input type="text"/>	

Download order list for shipping Software

Import tracking file [Import](#)

Shipping Software

File

This page allows you to export information to software commands carriers (laposte, ups) to generate shipping labels

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.

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

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.

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.

Click on the list of "shipping software» software to choose your carrier and then click "run along" to select the file to import tracking (generated by your software).

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).

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).

Planning

Sales Order Planning Settings

With these settings, you can customize the way Embedded ERP calculate sales order planning.

All this settings are available under System > Configuration > Sales Order Planning

General

Paramètre	Description
Allow planning	Yes / no

Order Consideration Date Calculation

Here, you can set when the order is being considered. This is the start date for the planning

Setting	Description
Consider Order when placed	Consider order after it is placed, whatever payment status
Consider Order when paid	Yes / no
Consider Order on Payment Validated	Consider order when payment validated is set to true
Consider Order when invoiced	Consider order when its invoice is created
Include holy days	Do not consider order on holy day (consider order the opened day after)
Consider Order for Tomorrow if placed after	If order placed after X, the order is considered tomorrow

Ready to prepare

This is the date where all products are reserved for the order and then you can start to prepare it.

Setting	Description
Avoid holy days	If ready to prepare date is an holy day, select the next opened day
Method of calculating risk	Select the method of calculating risk: in days or percentage
Worst date calculation value	Value (percent or value) to calculate worst date

Shipping date

This is the date when you ship the order. This is generally equal to the "ready to prepare" date plus preparation duration.

Setting	Description
Method of calculating risk	Select the method of calculating risk: in days or percentage
Order Preparation Duration	This the duration that you need to prepare an order. This is generally equal to 0 if you dont have assemble products or make tests.
Worst date calculation Mode	Define the way to calculate worst date (percent or value).
Worst date calculation value	Value (percent or value) to calculate worst date
Avoid holy days	Do not consider order on holy day (consider order the opened day after)

Delivery date

Setting	Description
Default Shipping Delay	This is the default delay that your carriers need to ship products. You can customize this value by shipping mode / country using menus ERP > Tools > Shipping delay
Worst date calculation Mode	Define the way to calculate worst date (percent or value).
Worst date calculation value	Value (percent or value) to calculate worst date
Avoid holy days	Do not consider order on holy day (consider order the opened day after)

Quote options

You can define here settings used to display estimated delivery date in the cart.

In order to estimate delivery date, the system needs to know if selected payment will be validated automatically (credit card, paypal) or if a manual validation is required (checks, bank transfer)...

Then, Embedded ERP considers 2 kinds of payment :

- Immediate payment : these are payment method that are validated (or refused) just after placing order (credit card, paypal)
- Delayed payment : payment methods that require a manual validation (bank transfer, check ...

Setting	Description
Immediate payment methods	Select methods for which validation is direct
Display planning in cart	If enabled, the estimated delivery date is displayed in the cart
Show debug information in Cart	If enabled the system will display debug information to explain how it calculate the estimated date. This option must not be enabled on production server.
Delayed payment method delay	This is the average duration (in days) required to validate a delayed payment.
Show planning in frontend Sales History	If enabled, sales order planning graph is displayed in the customer account.

Product Availability Status

Overview

Embedded ERP is able to display advanced product availability message to the customer depending of stock level, supply delay, expected purchase orders etc...

Product availability status is calculated using this information :

- **Available stock** : This is the stock available for sales. Available stock is equal to the product stock minus ordered quantity.
- **Supply Delay** : this is the average supply delay when you purchase product to your supplier. This value can be set at the global level, supplier level or product level.
- **Expected purchase order** : if you're waiting for a purchase order delivery, the system uses this display expected delivery date.
- **Out of stock periods** : you can setup out of stock periods

Out of stock period

You can fill out of stock period for each product (form is available in ERP > products > [select product] > Out of stock period). When you set a out of stock period, it means that your supplier(s) cant provide this product for this period.

Stock
Price
Pending sales order
Barcode
Purchase Settings
Purchase Orders
Suppliers
Organizer (0)
Out Of Stock Period
Availability Status

Nokia 2610 Phone Back Reset Force Stocks Update View product Save

Out of stock Period

Enabled

From Date

To Date

To fill a out of stock period, tick "Enabled" checkbox and fill in start date (required) and end date (optional)

Availability status

[View](#)

Embedded ERP store in database product availability information to improve speedness. This information is updated using bacground task

To get availability information :

- To list all availabilities : Select menus ERP > Tools > Product availability statuses
- To get information for one product : select menu ERP > Products > [Select product] > "Product availability status tab"

Product Availability Statuses Refresh

Page 1 of 6 pages | View 20 per page | Total 120 records found Reset Filter Search

Id	Product Id	Sku	Product	Available Qty	Supply Delay	Allow backorders	Supply date	Out of stock Period	Is Saleable	Status	Available date	Message	View	Refresh
121	19	8525PDA	AT&T 8525 PDA	0	36	Yes			Yes	Available under delay	2010-10-06	Shipped under 36 days	View	Refresh
120	166	HTC Touch Diamond	HTC Touch Diamond	848	5	No			Yes	In stock	2010-08-17	In Stock	View	Refresh
119	165	mycomputer	My Computer	79	5	No			Yes	In stock	2010-08-17	In Stock	View	Refresh
118	164	computer_fixed	Gaming Computer	968	5	No			Yes	In stock	2010-08-17	In Stock	View	Refresh
117	163	computer	Computer	426	5	No			Yes	In stock	2010-08-17	In Stock	View	Refresh
116	162	micronmouse5000	Microsoft Wireless Optical Mouse 5000	760	5	No			Yes	In stock	2010-08-17	In Stock	View	Refresh
115	161	logidinovo	Logitech diNovo Edge Keyboard	209	5	No			Yes	In stock	2010-08-17	In Stock	View	Refresh
114	160	logitechcord	Logitech Cordless Optical Trackman	616	5	No			Yes	In stock	2010-08-17	In Stock	View	Refresh
113	159	microsoftnatural	Microsoft Natural Ergonomic Keyboard 4000	275	5	No			Yes	In stock	2010-08-17	In Stock	View	Refresh

In each screen, the system displays this information :

- Available stock is 0 and backorders set to false
- Available stock is 0 and there is an out of stock period without end date
- Product stock status is "Out of stock" in the magento product sheet

Field	Description
Available qty	Stock level available for sale
Supply delay	<p>Average delay for product supply. This value can be set at 3 levels :</p> <ul style="list-style-type: none"> Product level (ERP > products > [Select product] > Purchase settings > supply delay) If no value is available at the product level, the system look at the supplier level (for suppliers associated to the product). Supplier default supply delay can be set in ERP > Purchasing > Supplier > [Select supplier] > Miscellaneous > Supply defay If no value is available at the supplier level, the system uses default value (System > Configuration > Purchase module > Purchase product > Supply delay)
Backorders	If set to true, customers can't buy products if available qty is 0
Supply date	Contains estimated date for Purchase Order delivery.
Out of stock period	Out of stock period set in the product sheet (ERP > Products > [Select product] > Out of stock tab
Salable	This information is calculated using other values. If salable is "No", product cant be sold on the website. Product is not selable when :
Status	<p>This is the product avalaibility status that defines availability message :</p> <ul style="list-style-type: none"> In stock : product is in stock and sellable Available under delay : product is not in stock but can be purchase from your supplier(s) Supply on : a supplier delivery is expected Out of stock until : product is not in stock and cant be supplied until X. It means that there is a out of stock period Out of stock without information : product is not in stock and no supply information is available
Available date	This is the estimated date where the product is back in stock. THis date is used to calculate sales order planning. If product is in stock, this date is today.
Message	Message displayed on the website.
Refresh	Refresh product availability status.

You can view the product by clicking on the button "View" and you will access to the ERP product. Click "force update of stock" to update the stock of this product.

Updates

Product availability statuses are automatically updated. These updates are made using background task, it means that it may take 1 or 2 minutes.

If you wish to manually update product availability, 2 ways :

- Click on the "refresh" link in ERP > Tools > product availability statuses to update availability for one product

- Click on refresh button in ERP > Tools > product availability statuses to update ALL availabilities

Customize message

When product is not in stock, the system displays "Available under X days" message using product supply delay. You can customize this message using Product Availability ranges (menus ERP > Tools > Product availability ranges)

For each range, you can define :

- From : range day start
- To : range day end
- Default caption : default caption displayed
- Store XX : For each store, you can customize default caption (for multi language support).

Range sample :

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"/>		

Sales Order Planning

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

Back office

Shipping delay

This settings are available under menus ERP > Tools > Shipping delay.

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:

Setting	Description
Default delay	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	<p>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 :</p> <ul style="list-style-type: none"> • Country_code : transit time • 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	3	DE:7,IT:5,FR:3

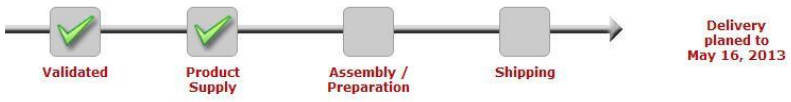
Order view

Order View

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Preparation
- Product Returns
- Margins
- Payment
- Planning
- Organizer (0)

Order # 100000169 | Order Date Aug 16, 2010 7:27:06 AM

Announced delivery date : Aug 17, 2010
 Announced Max delivery date : Aug 17, 2010



	Date	Force to	Max date	Comments
Order placed	Aug 16, 2010 7:27:06 AM	-	-	-
Considered on	Aug 16, 2010	<input type="text"/>	-	Order placed on 2010-08-16 14:27:06
Ready to prepare	Aug 16, 2010	<input type="text"/>	Aug 18, 2010	conf-dav-M-Black reserved (5) conf-dav-S-Blue reserved (1) conf-dav-M-Blue reserved (1) add 2 days to calculate max date
Shipping date	Aug 20, 2010	<input type="text"/>	Aug 24, 2010	add 4 days to prepare order add 2 days to calculate max date
Delivery	May 16, 2013	-	May 22, 2013	add 1000 days for shipping delay with flatrate_flatrate to NL add 2 days to calculate max date

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 view. 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.

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.

Customer side

Order progress

You can display sales order planning graph in the customer account

Commande n°300000007 - *En attente* [Renouveler la commande](#) | [Imprimer la commande](#)

À propos de cette commande : Informations commande

Date de commande : 20 juillet 2010

Validée **Approvisionnement produits** **Assemblage/Préparation** **Livraison**

Adresse de livraison	Mode de livraison
Zimmermann Olivier 1 rue de toulon Toulon, Var, 83000 France T: 0000	Flat Rate - Fixed

Note: to avoid system overload, planning is available a few minutes after an order is placed

Estimated delivery date in cart

You can display the estimated delivery date to your customer depending of cart's product, shipping method and shipping country. In this way, you inform customer BEFORE he places order

This feature displays 2 date in cart :

- Estimated date : estimated date if every operation are not late (order preparation, product supply etc..)
- Max date : estimated date using risk management (max dates)

Organizer

Overview

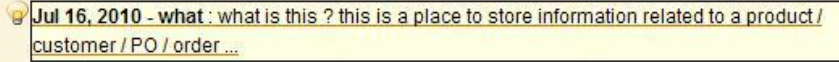
Organizer is a task / note manager which allow to associate comments to magento objects :

- Products
- Suppliers
- Sales Order
- Customer
- Purchase Order

When an organizer is associated to a Magento object, a "light" image is displayed in the grid : you can get more information about the note moving your mouse over the light image :

Products List

Page 1 of 10 pages | View 20 per page | Total 182 records found

Organizer	Barcode	Sku	Name
 <p>Jul 16, 2010 - what : what is this ? this is a place to store information related to a product / customer / PO / order ...</p>			
	7891037744509	hb8100	BlackBerry 8100 Pearl

Organizer management

To consult organizers, go within the object sheet (for example product sheet) and select "Organizer" tab :

Organizer Show / Hide New Task

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

Id	Entity	Date	Author	Target	Category	Caption	Deadline	Misc	Action
2	Nokia 2610 Phone	Jul 16, 2010	maisondulogiciel	maisondulogiciel		what			Show/Hide

Entity: [Nokia 2610 Phone](#) Created at 2010-07-16 delete Notify Target save

Author: [maisondulogiciel](#) Notification Date:

Target: [maisondulogiciel](#) Dead line: Origin: [maisondulogiciel](#) Priority: [1](#)

Caption: what Complete:

Description: what is this ? this is a place to store information related to a product / customer / PO / order ...

From this tab, you can :

- Add a new task : click on "Show / Hide new task", fill fields and click on the save button
- Edit task : click on the "Show / hide" link in the last column ; edit fields and click on "save" button"
- Delete a task : edit organizer and then click on the "delete" button

Organiser information

Field	Description
Entity	Object linked to the organizer (product, sales order, supplier...). You can view object clicking on this link.
Author	Task creator (magento user)
Target	Target user for this organizer. This field can be empty. You can also

	autotmatically send an email to the target ticking "Notify" checkbox
Notification date	Date to remind author
Dead line	Dead line for this task. If task is not complete at this date, it will be displayed as "late task"
Origin	For next releases
Catégorie	For next releases
Priority	1 = optional, 5 = very important
Complete	Tick this checkbox once task is complete
Caption	Task caption
Description	Task description

Notification

You can notify task's target using "Notify target" button : it will send an email to the target.

Dashboard

To list and track your tasks, select menu ERP > Organizer > Dashboard

- **Late task** : tasks not completed having dead line past
- **Notifications** : tasks with notification date set to today
- **My tasks** : all tasks where you are author or target

Late Tasks/Events

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

Id ↓	Entity	Date	Author	Target	Category	Caption	Deadline	Misc	Action
1	Zolof The Rock And Roll Destroyer: LOL Cat T-shirt	Jul 13, 2010	maisondulogiciel	admin		Rupture a partir du 14/07	Jul 14, 2010		Show/Hide

Notifications

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

Id ↓	Entity	Date	Author	Target	Category	Caption	Deadline	Misc	Action
1	Zolof The Rock And Roll Destroyer: LOL Cat T-shirt	Jul 13, 2010	maisondulogiciel	admin		Rupture a partir du 14/07	Jul 14, 2010		Show/Hide

My Tasks

[+ Show / Hide New Task](#)

Page 1 of 1 pages | View 20 per page | Total 3 records found

[Reset Filter](#) [Search](#)

Id ↓	Entity	Date	Author	Target	Category	Caption	Deadline	Misc	Action
		From: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		From: <input type="text"/>		
		To: <input type="text"/>					To: <input type="text"/>		
6	Order #100000108	Aug 5, 2010	admin			fdsqfsd			Show/Hide
4	Order #300000007-1	Jul 21, 2010	admin			Commande a annuler			Show/Hide
1	Zolof The Rock And Roll Destroyer: LOL Cat T-shirt	Jul 13, 2010	maisondulogiciel	admin		Rupture a partir du 14/07	Jul 14, 2010		Show/Hide

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.

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)

Installation

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

Magento settings

Settings are available using menu System > Configuration > Magento Client Computer

Setting	Description
Exchange directory	Server directory used to store files (text, pdf ...) download by the windows software. Php must be able to write / read this directory. Caution : you must fill ABSOLUTE directory path (ie : /home/mywebsite/mydirectory)
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.

Software configuration

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

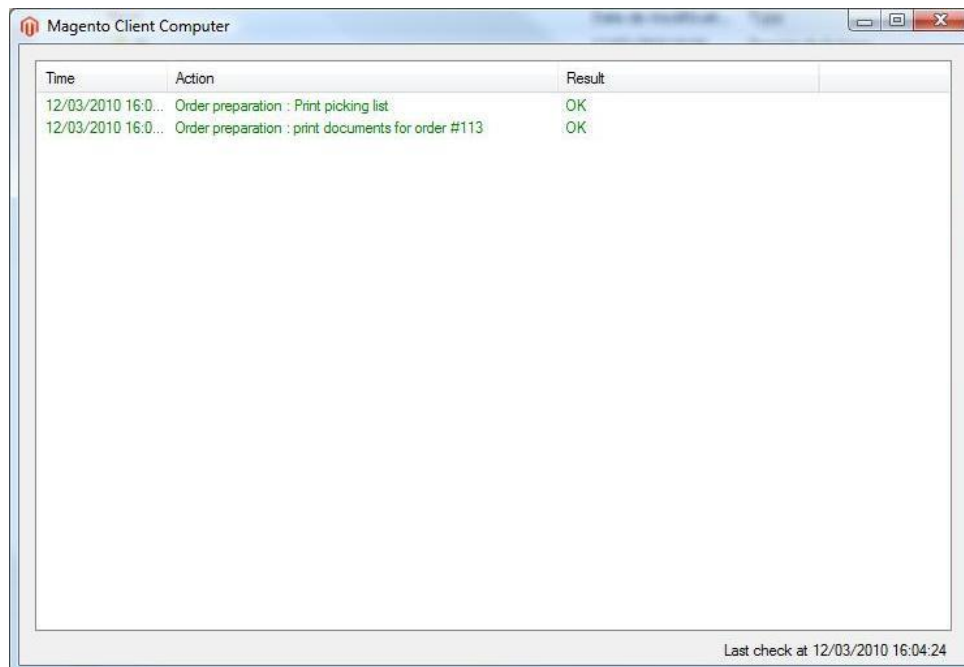
You can edit pref.xml using notepad.

To fill a parameter, simply edit « value » attribute. Pour éditer un setting, il vous suffit de saisir sa valeur dans la zone value=""

Setting	Description
url	Communication page url to download actions to perform : http://www.yourwebsite.com/ClientComputer/Front/ 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
password	Password set in Magento, menu System > Configuration > Client Computer > password

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 :



Test it !

Once Magento Client Computer is installed and configured, follow this steps :

- Launch Magento Client Computer
- Double click on the magento icon in the system tray (near the windows clock)
- Go back in magento admin panel, select menus ERP > Order preparation > Prepare orders
- Click on "Print picking list" button

If everything works fine, your printer should have print the picking list

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.

Scanner

Overview

Scanner is an Embedded ERP extension to use a handle barcode scanner to process :

- Inventories
- Picking for order preparation
- Create purchase order deliveries
- Barcode comparaison

This extension installs new Magento file with a specific theme optimized for a 240x320 pixels screen.

Hardware requirements

- Wifi barcode scanner with touch screen
- Magento admin panel access

Here are some compliant hardware models :

- Datalogic Skorpion
- Datalogic ELF
- Datalogic Kyman
- Datalogic Memor

Installation

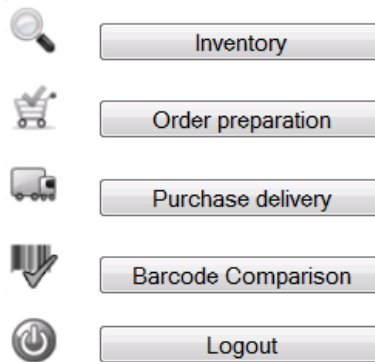
Upload files on server

Source	Target	Comments
js/MDN/Scanner.js	js/MDN	
app/code/local/MDN/Scanner	app/code/local	
app/design/adminhtml/default/default/layout/layout/*	app/design/adminhtml/default/default/layout/	
app/design/adminhtml/default/default/template/*	app/design/adminhtml/default/default/template/	
skin/adminhtml/default/default/images/scanner	skin/adminhtml/default/default/images	
app/etc/modules/*	app/etc/modules/	

Once this files are uploaded, refresh magento cache

How to use

4 menus are available : go in « ERP » , « Scanner »



- **Inventory** : To search products, change stock level and link barcodes to products
- **Order Preparation** : allow the picking for the order preparation.
- **Purchase order** : create deliveries for Purchase Orders
- **Purchase delivery** : receiving merchandise, scann your products with this menu.
- **Barcode comparison** : compare twice products
- **Logout** : use for logout

Notice : a search bar help you to find quickly a product.


Inventory

In the first screen, you can search a product scanning its barcode or typing keywords.

If only one product matches to the search, you're redirect to the product sheet, else results are displayed

Search results	
SKU	Product
n2610	Nokia 2610 Phone
bb8100	BlackBerry 8100 Pearl
sw810i	Sony Ericsson W810i
8525PDA	AT&T 8525 PDA
MM-A900M	Samsung MM-A900M Ace
MA464LL/A	Apple MacBook Pro MA464LL/A 15.4
LX.FR206.001	Acer Ferrari 3200 Notebook Computer PC
VGN-TXN27N/B	Sony VAIO VGN-TXN27N/B 11.1
M285-E	Toshiba M285-E 14

Select product to display product sheet :



Sony Ericsson W810i

sw810i

Default	
Stock :	<input type="text" value="58"/>
Available :	56
Location :	<input type="text" value="Set location"/>
Barcodes	
1234567890123	
555-999	

This view displays various information in the section "default" you will find:

- **Stock:** indicates the amount of stock default
 - **Available:** The amount available
 - **Location:** scanner label where it will be stored product then click "Close" to apply changes
- The "bar code" tells you different barcodes for the same product.

Order preparation (picking)

You can pick products for order preparation from this screen. It displays all required products to ship orders in Order Preparation > Selected orders. For each product, remaining qty is displayed. Each time you scan a barcode, the qty is decreased. When the required quantity is complete, the picking of order preparation is finished.

Picking	
0 / 1	Microsoft Wireless Optical Mouse 5000
0 / 5	BlackBerry 8100 Pearl
0 / 1	Intel C2D E8400 3.0GHz Retail

Purchase Order





Here, you can create purchase order delivery :

Create free delivery
<input type="button" value="Create Free Delivery"/>
Select supplier
helios
Sony
test_ERP_supplier
Toshiba

- First, select supplier to see orders linked

Select purchase order	
Date de livraison	Référence
2012-07-30	20120706BC1
2012-07-30	20120724BC1
2012-07-30	20120724BC3

- Next, select purchase order,once the order selected you will see the list of products waiting for delivery

Purchase Order #20120706BC1		
<input type="button" value="Create delivery"/>		
BlackBerry 8100 Pearl	0 / 18 - +	 
test_ERP	0 / 1 - +	 

- All purchase order's products are displayed.

From this page you can scan products awaiting delivery to the purchase order, once the quantity of a product resulted, it disappears from the list.

Once the list is empty, the products of the purchase order has been received, click "create delivery" to complete the delivery.

You can find delivery by going to the menu "ERP", "purchase", "purchase order", select the tab and click the "delivery" for viewing.

Miscellaneous

Export data

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).

Import Data

Embedded ERP supports several profiles to import datas. Profiles are available using menu System > imports / exports > advanced profiles.

Import product barcodes

- Source file is a csv file using ";" separator
- File must be titled "product_barcodes.csv" and upload in magento var/import directory
- File must contain 2 columns named "sku" et "barcode"
- "sku" column contains product's sku
- "barcode" column contains product barcode

Once file is uploaded, go in the profile, select "run profile tab" and click on "run in popup button"

File sample :

```
"sku";"barcode"  
"nokia3210";"1234567891234"  
"iphone4";"9263749761524"
```

Import product / warehouse stock levels

With this profile, you can update product stock level for each every warehouse

- Source file is a csv file using ";" separator
- File must be titled "product_warehouse_stock_level.csv" and upload in magento var/import directory
- File must contain 3 columns named "sku", "qty", "stock_code"
- "sku" column contains product sku
- "qty" column contains product stock level
- " stock_code " column contains warehouse code (can be set in ERP > Stocks > Warehouse > [select warehouse] > code

Once file is uploaded, go in the profile, select "run profile tab" and click on "run in popup button"

File sample :

```
"sku";"qty";"stock_code"  
"nokia3210";"43";"default"  
"iphone4";"0";"default"
```

In addition, you can also import the following datas :

- notify_stock : stock alerte level
- use_config_notify_stock : set to 1 if you want to use a customnotify_stock value
- shelf_location : location of the product in the warehouse
- is_favorite_warehouse : used for router
- ideal_stock_level : ideal stock level
- use_config_ideal_stock_level : set to 1 if you want to use a custom ideal stock level

Import suppliers

With this profile, you can import suppliers

- Source file is a csv file using ";" separator
- File must be titled "suppliers.csv" and upload in magento var/import directory
- File must contains this columns :
 - Column "sup_name" : Supplier name
 - Column "sup_address1" : Address 1
 - Column "sup_address2" : Adress 2
 - Column "sup_zipcode" : zip code
 - Column "sup_country" : country code (2 letters)
 - Column "sup_city" : city
 - Column "sup_tel" : phone
 - Column "sup_fax" : fax
 - Column "sup_contact" : main contact name
 - Column "sup_mail" : email (used to notify customer for purchase order)
 - Column "sup_website" : supplier website url
 - Column "sup_account_login" : your login on supplier website
 - Column "sup_account_password" : your password on supplier website

- Column "sup_supply_delay" : default supply delay
- Column "sup_comments" : comments
- Column "sup_code" : supplier code (used for other profiles)
- Column "sup_locale" : supplier language (2 letters)

Once file is uploaded, go in the profile, select "run profile tab" and click on "run in popup button"

File sample :

```
"sup_code";"sup_name";"sup_contact"  
"ms";"microsoft";"Bill Gates"  
"apple";"Appel Inc."; "Steve Jobs"
```

Import product / supplier association

With this profile, you can import or update associations between product and supplier and also update supplier price / sku / stock

- Source file is a csv file using ";" separator
- File must be titled "product_supplier.csv" and upload in magento var/import directory
- File must contain 2 mandatory columns :
 - Column "sku" contains your product's sku
 - Column "supplier_code" contains supplier code

In addition, it can contains these other columns :

- pps_comment : simple comments
- pps_reference : supplier's sku
- pps_last_unit_price : unit price
- pps_last_price : price plus landing costs
- pps_quantity_product : supplier stock level
- pps_can_dropship : enable drop ship
- pps_supply_delay : average supply delay

Once file is uploaded, go in the profile, select "run profile tab" and click on "run in popup button"

File sample :

```
"sku";"supplier_code";"pps_unit_price";"pps_reference";"pps_quantity_product"  
"nokia3210";"ms";"45.53";"nk-3210", "187"  
"iphone4";"apple";"177";"ip-2", "9401"
```

Background tasks

As Embedded ERP manages many process and datas, some updates are done in background task to avoid server overload and improve navigation. It means that some operation are done in background task and may need a few minutes to be applied. For example, when you create a purchase order delivery, product reservation are not done immediately.

To process these tasks, Embedded ERP uses "background task" extension which include the following features :

- Schedule tasks
- Execute tasks in background
- Notify technician when a task fails
- View task history

To consult scheduled tasks, select menu ERP > Tools > background task

Here are a few task samples :

- Add Order #XXX to selected orders : add a sales order to the selected orders tab in Order Preparation screen
- Create shipment & invoices : Create shipment and invoice for a sales order
- Dispatch order #XXX : when product reservation change for one order, dispatch this order in fullstock / stockless / ignored order
- Notify shipment : send shipment email to customer
- Notify invoice : send invoice email to customer
- Update planning for order #XXX : update sales order planning.
- Update stock for product #XXX : Update product stock, reserved qty, ordered qty
- Update supply needs for product #XXX : Update product supply needs

From a technical standpoint, tasks are executed using server cron every minutes. It is important that you configure your server to execute magento cron every minutes.

You can execute task requesting manually your cron using url :

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

FAQ

Background tasks are not executed

This is the most frequent issues reason

You probably have a cron issue : this is the server cron that executes background tasks. First, check if all background tasks are executed from menu ERP > Tools > Background tasks

If not, wait a few minutes

If background tasks are still not executed, your cron is probably misconfigured. Then, manually request URL www.mywebsite.com/cron.php. Next check your cron settings at the server level. For more information, please read "Settings" section.

Stocks are not updated, products are not reserved for orders

You probably have a cron / background tasks issue. Please read the first post.

Product availability statuses are wrong

If you just installed ERP, it is advised to first initialize product availability statuses : select menu ERP > Tools > Product availability statuses and click on refresh button

If the problem remains, check that your cron / background task works properly.

Bug when creating shipment

When you create a shipment, stocks are decreased. However, to know what warehouse use for stocks updated, ERP needs to know what warehouse is associated to the current order. For this, ERP uses assignments. Please, check that the current order's website owns a warehouse for "preparation" role. This can be set in ERP > Stocks > Warehouse

Sales order containing bundle or configurable products are stock less

In the order preparation screen, "Stockless" tab contains order with order for which at least one product is missing. If bundle or configurable products are displayed in red, it means that you didn't disable stock management for this products.

TO fix this behaviour, go in the product sheet, select "inventory" tab and disable stock management for bundle / configurable products. Then, return in "ORDER preparation" screen and click on "Refresh" button.

When i access ERP setting using menu System > Configuration, "Access denied" or blank screen is displayed

This is an permission issue. After ERP installation, you have to logout and login again into Magento admin panel.

When i save product, "Unknown column exclude_from_supply_needs" error message is displayed

TO fix this issue, you have to refresh Magento indexes using menu System > Index management

All ERP screens are blank

You probably made a mistake during layout and templates installation.

Please, check that you copied files in the right directory (app/design/adminhtml/default/default/)

No ERP menus available

It means that Magento didn't recognize extensions :

- Did you refresh Magento cache ?
- Do files app/etc/modules are properly uploaded ?