

order_preparation_magento2

version

BoostMyShop

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Order Preparation for Magento2

1. Overview

Order preparation extension for Magento 2 helps merchant to manage orders to ship and provide a professional pick / pack / ship process to ship orders from Magento 2.

If you also use our Inventory Management extension, the order preparation will automatically use the reservation process to distribute orders in the right tab.

2. Installation

First Installation

To install a boostmyshop magento2 extension on your platform, process the following steps :

- Download zip archive from your boostmyshop customer account
- Upload files on your server : once uploaded, module must be in directory `app/code/BoostMyShop/`
- Connect on your server via ssh. and run the following commands :

```
php bin/magento setup:upgrade
rm -rf var/generation
php bin/magento module:enable BoostMyShop_OrderPreparation
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
```

Once everything is done, go back in Magento, select menu system > web setup wizard, then click on the component manager button : you should see the new extension here

Upgrade

The upgrade process is exactly the same as the installation process

Disable extension

To disable an extension, select menu system > web setup wizard, then click on the component manager button Find the extension you want to disable and select "disable" in the "Actions" column

3. Concepts

This page explains the main concepts for the order preparation extension.

Orders distribution in tabs

The order preparation extension main screen displays 3 tabs in which it distributes orders :

- In stock orders : contains orders for which every products are in stock
- Out of stock orders : contains orders with at least one back order
- Holded orders : contains orders that you dont want to process for the moment. This tab usually contains not paid orders, or fraud suspected

You can control the distribution in tabs based on the orders statuses (please check the configuration section for more details)

This screen provides a very clear state about the orders you have to ship and their progress.

The pick / pack / ship screen supports multiple packers and multiple warehouses (if you use our inventory management extension).

4. Configuration

Main workflow

The workflow is customizable via the options available in the configuration, however, here is the typical workflow provided by the extension :

1. Select product batch : select a batch of orders to process. You can pick orders in any tab (in stock / out of stock / holded. The selected orders are then added into the "In progress" tab, with a preparation status to "new"
2. Print the picking list : you can print both a global picking list (summarizing every products to pick for every orders, sorted by shelf location) but also a per-order picking. This second document display all order information on one single page. Picked orders go to preparation status "picked"
3. Pack the order : scanning the order barcode available on the picking list, the order details are displayed on the screen. You can then scan all products to pack for verification. Once all products are scanned, you can confirm the packing. Preparation status then goes to "Pack"
4. Print the shipping label : using the carrier template feature, you can print the shipping label from any carrier software. Then, scan the tracking number to save it into the order. Preparation status is now "Shipped" and the customer is notified by email

Once all orders in the batch are shipped, you can process a new batch.

Shipping label templates

The large majority of carriers provide software (or website based software) to import order details and create shipping and print the shipping label. However, none of them use the same file format : it can be csv, xml, txt files and the content may vary.

To ensure the compatibility with every carriers softwares, order preparation for magento2 includes a carrier templates system that allows to build the export file depending of the shipping method.

You can then configure a custom order information file structure for each carrier.

4. Configuration

The configuration is available in menu stores > configuration > boostmyshop > order preparation.

Attributes

Configure the attributes to use in the order preparation screen

- **Barcode attribute** : product attribute to use to retrieve products from scan in the packing screen
- **Manufacturer attribute** : product attribute to use to display the manufacturer in the picking list and in the packing screen
- **Shelf location attribute** : product attribute to use to display the shelf location in the picking list and in the packing screen

Order preparation steps

In this section, you can select the steps available in the order preparation screen.

To get more details about each steps, read both concepts & order preparation sections

Packing

- **Allow partial packing** : if enabled, you can partially pack an order from the packing screen : then only scanned products will be added to the new shipment
- **Create order shipment** : if enabled, a shipment is created when you confirm the packing
- **Create order invoice** : if enabled, an invoice is created when you confirm the packing
- **Invoice only shipped items** : (requires previous setting enabled) : only packed products will be invoiced

5. Order preparation

- **Automatic invoice download** : once you confirm the packing, the invoice PDF document is automatically downloaded
- **Automatic packing slip download** : once you confirm the packing, the shipment PDF document (packing slip) is automatically downloaded
- **Automatic shipping label / carrier template download** : once you confirm the packing, the carrier template file is automatically downloaded

Order statuses mapping

You can select here the orders statuses to distribute orders in the different tabs.

Note : if you select the same status for different tab, orders will be displayed in all tabs.

5. Order preparation

The order preparation screen is designed to easily process shipment for orders.

Order Preparation

🔍 🔔 👤 admin ▾

Operator : admin ▾
Warehouse : Default ▾

1. Orders Selection

2. Picking

3. Packing

4. Download PDFs

5. Flush shipped orders

In Stock Backorder Holded **In progress**

2 records found

#	Date	Order Status	Store	Customer	Shipping method	Products	Preparation Status	Action
000000125	2016-04-13 02:23:42	processing	Main Website Main Website Store Default Store View	adam JONES	Flat Rate - Fixed	3x MP07-32-Black - Thorpe Track Pant-32-Black 2x WS06-XL-Purple - Elisa EverCool™ Tee-XL-Purple	shipped	View Remove Pack
000000325	2016-04-13 04:32:10	processing	Main Website Main Website Store Default Store View	adam MILLER	Flat Rate - Fixed	1x WS01-XS-Green - Gwyn Endurance Tee-XS-Green 1x MH03-XS-Blue - Bruno Compete Hoodie-XS-Blue 4x WSH01-31-Red - Fiona Fitness Short-31-Red	packed	View Remove Pack

Batches & Steps

The steps for are available as "red buttons" at the top of the screen. You can configure the available steps in stores > configuration > boostmyshop > order preparation.

Whatever steps configuration you choose, it is recommended to process orders by batch (let's say 20 orders in a batch), and process ALL the steps for the current batch. Orders for the current batch are in the "In progress tab".

Once you have processed all steps, the last one (Flush shipped orders) will remove orders in the "in progress tab", so you can start a new batch.

During the preparation, you can track the progress per order using the "Preparation status". Preparation status can take the following values :

- New : order has just been added to the batch
- Packed : order has been packed
- Shipped : order is shipped (the carrier tracking number is stored in the shipment)

Operator & warehouses

At the top of the screen, you can change the current operator and the current warehouse.

5. Order preparation

- **Operator** : each operator can prepare its own batch of orders. If you select orders for one operator (adding them into the in progress tab), those orders will not be visible for other operators. This way, several operators can work at the same time on different batches.
- **Warehouse** : this is the warehouse from which you prepare orders. If you only use the order preparation extension, only the default warehouse is available. However, if you also use our Inventory management extension OR Embedded ERP, several warehouses will be available here. The orders visible for one warehouse depends of the routing rules in Inventory Management : you will then see only orders having at least one product to be dispatched from the current warehouse.

Order selection step

This first step (mandatory) is designed to select orders to be added in the batch.

Only opened orders are visible in this screen. Opened orders are orders not fully shipped neither cancelled.

To help you in this task, the opened orders are displayed in 4 tabs : * **In stock** : contains the orders for which products to ship are in stock. * **Backorder** : contains the orders for which products to ship are not in stock * **Holded** : contains the orders not to ship. * **In progress** : contains the orders being prepared (selected in the current batch).

Products	Action
<input type="text"/>	
4x WSH01-30-Red - Fiona Fitness Short-30-Red	View Prepare
2x WH02-XL-Orange - Hera Pullover Hoodie-XL-Orange	
2x WSH08-28-Purple - Sybil Running Short-28-Purple	
3x MSH06-32-Blue - Lono Yoga Short-32-Blue	
3x WSH08-31-Purple - Sybil Running Short-31-Purple (1/3)	View Prepare
3x WSH08-31-Purple - Sybil Running Short-31-Purple	View Prepare

The orders displayed in tabs depend of the configuration for the statuses (available in store > configuration > boostmyshop > order preparation > order statuses mapping).

If you also use Inventory Management extension, the distribution between tabs "in stock" and "backorders" also depends of the reservation status : an order having every products reserved will be displayed in the "in stock" tab. If an order contains one or more product NOT reserved, it is displayed in the backorder tab.

Every orders are displayed with the product details. Color codes are used to distinguish the product statuses :

- **Strikethrough** : product is already shipped
- **Green** : product is in stock (or reserved for this order)
- **Red** : product is missing
- **Orange** : product is partially reserved or partially in stock (for instance, you must ship 3, only 2 are in stock)
- **Grey and italic** : product must be dispatched from another warehouse

5. Order preparation

From these tabs, you can select the orders to add to the current batch to dispatch them. To Achieve that goal, 2 options :

- Tick the order checkboxes, and select mass action "Prepare"
- Use the "Prepare" link in the "action" column

In both case, order is removed from the current tab and added to the "In progress" tab.

Note : If a product is NOT in stock, it will not be added to the batch and then you'll process a partial shipment.

Picking

The picking step downloads a PDF with order details to assist you.

You can add a first global pick sheet at the beginning of the document (option must be enabled in stores > configuration > boostmyshop > order preparation).

The global picking sheet summarizes ALL the products you need to prepare orders in the batch. This is very convenient to pick all the products and pack them afterward.



Global Picking Sheet

Qty	Location	SKU	Product
4		WSH01-31-Red	Fiona Fitness Short-31-Red
1		MH03-XS-Blue	Bruno Compete Hoodie-XS-Blue
1		WS01-XS-Green	Gwyn Endurance Tee-XS-Green
2		WS06-XL-Purple	Elisa EverCool™ Tee-XL-Purple
3		MP07-32-Black	Thorpe Track Pant-32-Black

After the global picking sheet, the PDF contains one page per order, summarizing order details :

- Barcode : the barcode contains the order number, and will be used in the packing step.
- Order details
- Customer addresses
- Products list

Packing

The packing applies on orders in the batch.

To pack an order, you can :

- Scan the barcode on the picking list
- Select the order with the drop down menu on the top left corner.

In both cases, the order details are displayed, with the products to pack.

For each products, you can scan the product barcode OR use the - / + button to update the quantity packed. Every time the quantity packed for one product changes, the status on the right changes.

6. Shipping label Templates

Packing

Search, Notifications, User: admin

Scan product barcode

1. Orders Selection

2. Picking

3. Packing

4. Download PDFs

5. Flush shipped orders

Order to pack: #000000371 (olivier JONES) - new

Order #000000371

Ship to	Shipping method	Shipping country	Status	Estimated Weight
olivier JONES	Flat Rate - Fixed	US	pending	6

Image	Location	Qty to ship	Qty packed	SKU	Product	Status
		3	-- - 3 + ++	WS02-L-Red	Gabrielle Micro Sleeve Top-L-Red	Packed
		3	-- - 1 + ++	MSH01-33-Blue	Cobalt CoolTech™ Fitness Short-33-Blue	2 missing

Commit packing

Once every product are packed, you can confirm the packing using the commit packing button : the extension will create shipment and invoice (depending of the settings in stores > configuration > boostmyshop > order preparation) and display a confirmation screen.

From the confirmation screen, you can :

- Download the packing slip PDF
- Download the invoice PDF
- Download the shipping label template file
- Enter the tracking number and save it into the shipment : when the tracking number is saved, the customer is notified by email (using the regular magento shipment notification email)

Download PDF

Using this button, you download all invoices and packing slips for all orders in the batch.

Note : packing slip & invoices are downloaded only if they have been created !

Flush shipped orders

This button remove the shipped orders from the "in progress" tab, so you can start for a new batch.

6. Shipping label Templates

Here you can configure **the way our extension will export orders information** into a csv, text or PDF file.

When you confirm the packing, the order information file is downloaded (called "shipping label").

You can then import these files into your carrier software to print shipping labels.

General

Field	Description
Name	Set there the shipping template name
Status	Set the status to <code>Active</code> to enable this shipping template
Type	Select "Order details file export" for txt, csv & xml shipping templates. Set "simple address label" for PDF ones.

6. Shipping label Templates

Associate shipping methods	When shipping labels will be generated for an order, it will retrieve the matching templates based on the shipping method(s) selected there.
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Export

There you can configure how the shipping label files are made.

Field	Description
File name	Name of shipping labels generated, must include file extension in the file name . Ex : for a CSV file, name will be " your_template_name.csv ".
Mime type	Select shipping label type. Must match with the file extension provided in the "file name" option.
File header line	Set scheme of file header (if exists). Most of the time this is the column's names, separated by a coma or a semi-colon.
Header line for orders	Set scheme of header line for each order in the template. You can use available codes there, putting them between curly brackets . Ex : for code "order.increment_id", you have to write "{order.increment_id}".
Line for each products in orders	Set scheme of product lines in the template. This line is repeated for each product of an order.
Footer line for orders	Set scheme of footer line in the template. This line is added at the end of each order.

Available codes

You can use codes to include order or product details within the export file. A code is added between curly brackets, for instance, to include the order number, use {order.increment_id} The list of every codes is available in the "Available codes" tab (there are generated using the last shipment).

Examples

Simple csv

- **File header line**

```
order;customer_firstname;customer_lastname;weight;address;city;postcode;country
```

- **Header line for orders**

```
{order.increment_id};{shippingaddress.firstname};{shippingaddress.lastname};{shipment.total
```

- **Output file**

```
order;customer_firstname;customer_lastname;weight;address;city;postcode;country  
000000008;Olivier;Zimmermann;3.00;12 rue des champs elysees;paris;75001;FR
```

Simple csv with products

- **Header line for orders**

```
o;{order.increment_id};{shippingaddress.firstname};{shippingaddress.lastname};{shipment.tota
```

- **Line for each products in orders**

```
p;{orderitem.qty_shipped};{orderitem.sku};{orderitem.name};{product.barcode}
```

6. Shipping label Templates

- **Output file**

```
o;0000000008;Olivier;Zimmermann;3.00;12 rue des champs elysees;paris;75001;FR
p;2;NOK1260;Nokia 2460 3G;3067263547372
p;1;headset12;Nokia headset 10122;3097263999972
```

Xml

- **File header line**

```
<orders>
```

- **Header line for orders**

```
<order id="{order.increment_id}">
  <shipto>
    <firstname>{shippingaddress.firstname}</firstname>
    <lastname>{shippingaddress.lastname}</lastname>
    <street>{shippingaddress.street}</street>
    <postcode>{shippingaddress.postcode}</postcode>
    <city>{shippingaddress.city}</city>
    <country>{shippingaddress.country_id}</country>
  </shipto>
  <products>
```

- **Line for each products in orders**

```
<product sku="{orderitem.sku}" qty="{orderitem.qty_shipped}">
```

- **Footer line for orders**

```
</products>
</order>
```

- **Output file**

```
<orders>
  <order id="0000000008">
    <shipto>
      <firstname>olivier</firstname>
      <lastname>zimmermann</lastname>
      <street>12 rue des champs elysees</street>
      <postcode>75001</postcode>
      <city>Paris</city>
      <country>FR</country>
    </shipto>
    <products>
      <product sku="NOK1260" qty="2">
      <product sku="headset12" qty="1">
    </products>
  </order>
</orders>
```