

prestashop_erp

version

BoostMyShop

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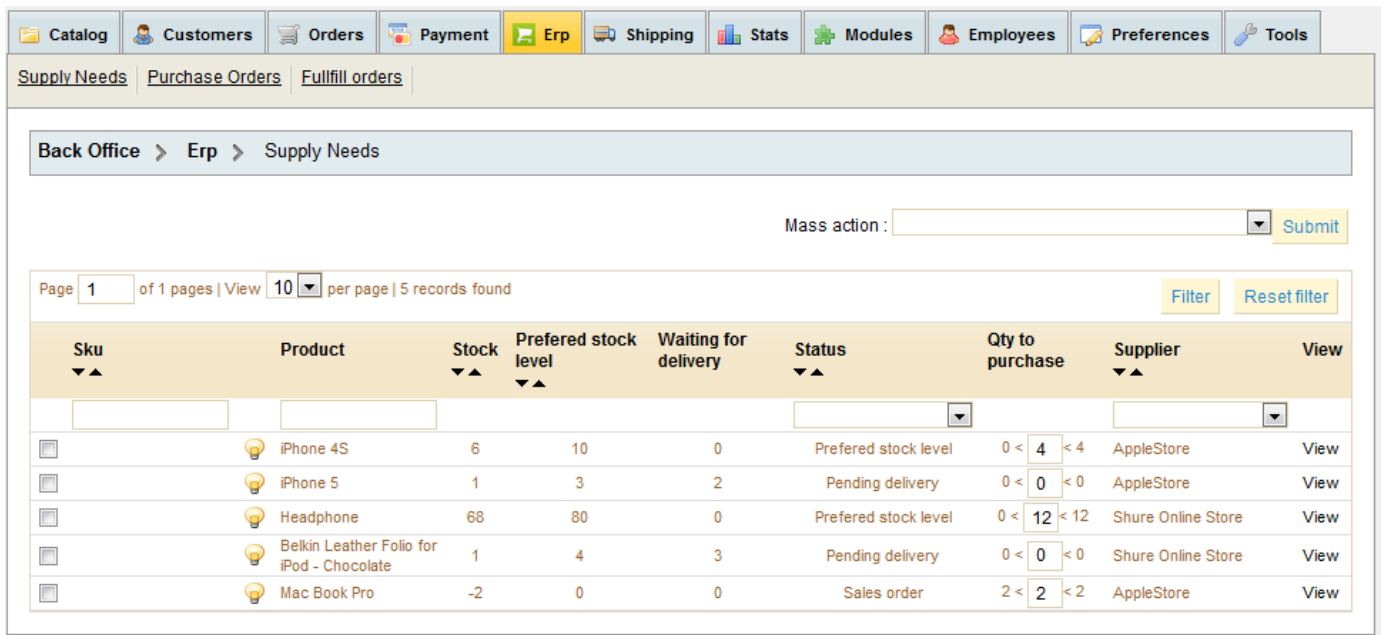
prestashop_erp

1. Overview

Prestashop ERP is an add-on to manage supply, purchases and order fulfillment within the Prestashop admin panel.

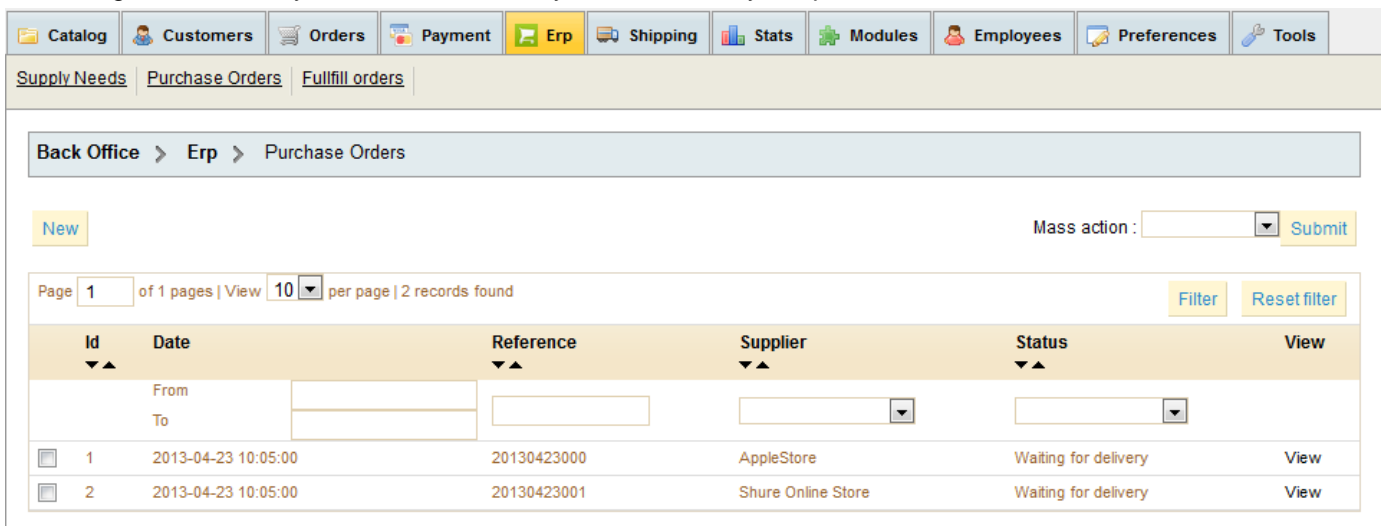
The main features are :

- **Supply needs** : the module keeps a list up-to-date of the products you need to purchase as you sold back-ordered items or when the stock level was reaching the warning stock level. You can easily filter the list by supplier and create a new purchase order.



| Sku | Product | Stock | Preferred stock level | Waiting for delivery | Status | Qty to purchase | Supplier | View |
|-----|-------------------------------------------|-------|-----------------------|----------------------|-----------------------|-----------------|--------------------|------|
| | | | | | | | | |
| | iPhone 4S | 6 | 10 | 0 | Preferred stock level | 0 < 4 < 4 | AppleStore | View |
| | iPhone 5 | 1 | 3 | 2 | Pending delivery | 0 < 0 < 0 | AppleStore | View |
| | Headphone | 68 | 80 | 0 | Preferred stock level | 0 < 12 < 12 | Shure Online Store | View |
| | Belkin Leather Folio for iPod - Chocolate | 1 | 4 | 3 | Pending delivery | 0 < 0 < 0 | Shure Online Store | View |
| | Mac Book Pro | -2 | 0 | 0 | Sales order | 2 < 2 < 2 | AppleStore | View |

- **Purchase orders** : Create purchase orders, easily add products, set buying price, quantities... Once your order is ready, you can send an email to the supplier with the purchase order PDF in attachment. Then, when the goods arrive in your warehouse, easily declare delivery to update the stock level



| Id | Date | Reference | Supplier | Status | View |
|----|---------------------|-------------|--------------------|----------------------|------|
| | From | | | | |
| | To | | | | |
| 1 | 2013-04-23 10:05:00 | 20130423000 | AppleStore | Waiting for delivery | View |
| 2 | 2013-04-23 10:05:00 | 20130423001 | Shure Online Store | Waiting for delivery | View |

- **Order fulfillment** : thanks to this wizard, you instantly see what orders can be fulfilled and what orders are pending supply or payment. Select orders you want to fulfill, print the picking list, mass print invoiced / packing slip, export order information to the carrier softwares to print shipping labels, import tracking number in prestashop and mass notify customers to inform them about the shipping.

2. Installation

| Date | Order id | Customer | Products | Shipping method | Status | View |
|---------------------|----------|-----------------|------------------------------|-----------------|-------------------------|------|
| 2013-04-23 09:52:38 | 000013 | Anthony Jullien | 1x Produit A 1x Produit F | 0 | Preparation in progress | View |
| 2013-04-23 09:52:53 | 000012 | Anthony Jullien | 1x Produit F | 0 | Preparation in progress | View |
| 2013-04-23 09:53:15 | 000010 | Anthony Jullien | 1x Produit B 2x Produit D | 0 | Preparation in progress | View |

2. Installation

1. Files copy

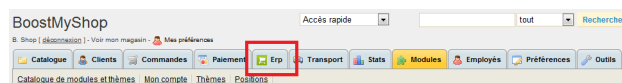
Before you upload files on your server, you must rename directory « admin_bms » with the name of your admin panel. Then, upload all files on your server.

2. Module installation

Once all files are uploaded, go in Prestashop Admin Panel and select « modules » tab : in this tab, select the « administration » section and click on the « Install » button.



Once the module is installed, a new « ERP » tab is visible :



3. Hooks installation

To customize Prestashop behaviour, it is necessary to edit Prestashop core files.

Note: Line numbers are given in a indicative way, they depending on PrestaShop version, pay attention to the "Location" section to add correctly the code into the file.

1. Supplier sheet

Prestashop 1.5 :

No additional code is required.

Prestashop < 1.5 :

- Edit file : `[/name_of_your_admin_directory]/tabs/AdminSuppliers.php`
- Code to be added : `echo Module::hookExec('supplierSheetForm', array('supplier' => $supplier));`
- Location (around line 201) :

```
<input type="radio" name="active" id="active_off" [...] alt="'. $this->l('Disabled')." ' title=
echo Module::hookExec('supplierSheetForm', array('supplier' => $supplier));
echo '<div class="margin-form"><input type="submit" value="'. $this->l(' Save ').'" [...] <sup>
```

2. Product sheet (back office)

Prestashop 1.5 :

- Edit `file` : `[/name_of_your_admin_directory]/themes[/name_of_your_theme]/template/controllers/products/quantities.tpl`
- Code to be added : `{hook h='catalogProductSheetAfterStocks' product=$product}`
- Location (around line 208) :

```
{if !$has_attribute}
<tr>
<td class="col-left"><label>{l s='Minimum quantity:'}</label></td>
<td style="padding-bottom:5px;">
<input size="3" maxlength="6" name="minimal_quantity" id="minimal_quantity" type="text" valu
<p class="preference_description">{l s='The minimum quantity to buy this product (set to 1 t
</td>
</tr>
{/if}
{hook h='catalogProductSheetAfterStocks' product=$product}
{if $ps_stock_management}
<tr>
<td class="col-left">
...
```

2. Installation

Prestashop < 1.5 :

- Edit file : `/[name_of_your_admin_directory]/tabs/AdminProducts.php`
- Code to be added : `echo Module::hookExec('catalogProductSheetAfterStocks', array('product' => $obj));`
- Location (around line 2706) :

```
if ($obj->id)

echo '<tr><td class="col-left">' . $this->l('Quantity in stock:') [.....] value="' . $qty.'" /><

echo Module::hookExec('catalogProductSheetAfterStocks', array('product' => $obj));

if ($has_attribute)

echo '<tr><td class="col-left">&nbsp;  </td><td><div [...] quantity here, but in the Combinatio
```

3. Product sheet (front office)

Prestashop 1.5 :

- Edit file : `/themes/[name_of_your_theme]/product.tpl`
- Code to be added :

```
<!-- [START ERP SUPPLY DATE] -->
<p id="pSupplyDate" {if $product->quantity > 0 || $allow_oosp || $product->getSupplyDate() =
<span id="supply_date_label">{l s='Available from'} : </span><br/>
<span id="supply_date_value">{$product->getSupplyDate()}</span>
</p>
<!-- [END ERP SUPPLY DATE] -->
```

- Location (around line 368) :

```
<!-- number of item in stock -->

{if ($display_qties == 1 && !$PS_CATALOG_MODE && $product->available_for_order)}

[...]
</p>

{/if}

<!-- [START ERP SUPPLY DATE] -->

<p id="pSupplyDate" {if $product->quantity > 0 || $allow_oosp || $product->getSupplyDate() =
<span id="supply_date_label">{l s='Available from'} : </span><br/>
<span id="supply_date_value">{$product->getSupplyDate()}</span>

</p>

<!-- [END ERP SUPPLY DATE] -->

<!-- Out of stock hook -->

<div id="oosHook"{if $product->quantity > 0} style="display: none;"{/if}>

{$HOOK_PRODUCT_OOS}

</div>
```


3. Supply needs

Prestashop < 1.5 :

- Edit file : /themes/[name_of_your_theme]/product.tpl
- Code to be added :

```
<!-- [START ERP SUPPLY DATE] -->

<p id="pSupplyDate" {if $product->quantity > 0 || $allow_oosp || $product->getSupplyDate() =

<span id="supply_date_label">{l s='Available from'} : </span><br/>

<span id="supply_date_value">{$product->getSupplyDate()}</span>

</p>

<!-- [END ERP SUPPLY DATE] -->
```

- Location (around line 353) :

```
<!-- number of item in stock -->

{if ($display_qties == 1 && !$PS_CATALOG_MODE && $product->available_for_order)}

[...]

{/if}

<!-- [START ERP SUPPLY DATE] -->

<p id="pSupplyDate" {if $product->quantity > 0 || $allow_oosp || $product->getSupplyDate() =

<span id="supply_date_label">{l s='Available from'} : </span><br/>

<span id="supply_date_value">{$product->getSupplyDate()}</span>

</p>

<!-- [END ERP SUPPLY DATE] -->

<!-- Out of stock hook -->

{if !$allow_oosp}

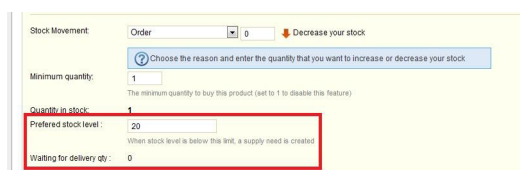
[...]

{/if}
```

3. Supply needs

1. Preferred stock level

When ERP is installed, a new field is displayed in the product sheet :



The screenshot shows a portion of the Prestashop product sheet. It includes fields for 'Order' (set to 0), 'Minimum quantity' (set to 1), and 'Quantity in stock' (set to 1). A red box highlights the 'Preferred stock level' field, which is currently set to 20. Below this field, a small text box explains: 'When stock level is below this limit, a supply need is created'. The 'Waiting for delivery qty' field is set to 0.

The preferred stock level can be set for each product : when the product stock level goes beyond this limit, a new supply need is created. By default, preferred stock level is set to 0 for every products.

4. Purchase order

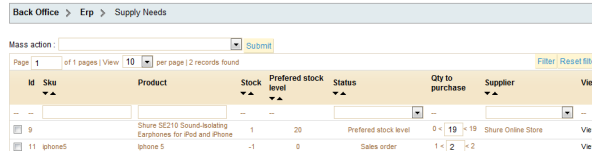
2. Backordered products

Basically, Prestashop can handle backordered products : a backordered product is a product sold without stock to fulfill the order : in this case, ERP will automatically create a supply need to inform you that you have to purchase this product. To enable backorders for a product, go in the product sheet and check « Allows orders » in the « When out of stock » section.



3. Supply needs

Supply needs list is available with menu ERP > Supply needs :



| Id | Sku | Product | Stock | Preferred stock level | Status | Qty to purchase | Supplier | View |
|----|---------|-----------------------------------------------------------|-------|-----------------------|-----------------------|-----------------|--------------------|------|
| 9 | | Share SE210 Sound-isolating Earphones for iPod and iPhone | 1 | 20 | Preferred stock level | 0 x 19 | Share Online Store | View |
| 11 | iphone5 | iphone 5 | -1 | 0 | Sales order | 1 x 2 | -2 | View |

For each product, the system display several information :

- **Sku** : product reference
- **Product** : product name
- **Stock** : current stock level (a negative stock level means that you have backordered products)
- **Preferred stock level** : see above
- **Status** : 3 values can be displayed
 - o **Sales order** : you must purchase the product to fulfill a sales order.
 - o **Preferred stock level** : you must purchase the product because the stock level is below the preferred stock level
 - o **Pending supply** : this status means that the product is needed but a purchase order exists and is expected for delivery. When the PO delivery will be created, the supply need will be hidden.
- **Supplier** : product supplier
- **View** : display product sheet

4. Create a purchase order

You can easily create a Purchase Order from supply needs :

- Filter products list (with suppliers for example)
 - Tick every products you want to add to the purchase order : you must also select the quantity for each product. Around the quantity field, the system displays a minimum quantity and a maximum quantity :
 - o Minimum quantity : quantity needed to fulfill orders
 - o Maximum quantity : quantity needed to fulfill orders AND to reach the preferred stock level.
 - In the action menu, select the right supplier and click on the « Execute » button.
- Then, a new purchase order is created and the selected products are added to the PO.

4. Purchase order

1. Configuration

To configure ERP, go in menu Modules > Administration > Erp pour Prestashop > Configure > Purchase :

4. Purchase order

- **Notify supplier status** : when you send PO by email to the supplier, ERP can toggle PO status to the defined value
- **Tax rules** : default tax rate for products
- **Merchant name -> Country** : information used to display your address in the PO PDF
- **PDF footer** : information displayed in the PDF footer
- **Mail template** : email content sent to the supplier for purchase order notification

2. Suppliers management

Basically, Prestashop can handle suppliers in menu Catalog > suppliers. However, ERP extend supplier information adding several fields :

- **Default supply delay** : When product is out of stock, ERP displays availability message based on the supplier supply delay : « Shipped under X days »
- **Address** : printed on the purchase order PDF
- **** Email**** : used to send an email to the supplier to notify about a new Purchase Order

3. Create a new Purchase Order

To create a new Purchase Order, 2 ways:

1. From the supply needs (read supply needs section)
2. From the purchase order list available in ERP > Purchase orders : click on the « New » button, select the supplier and click on « save » button.

In both cases, a new purchase order is created and you are redirected to the PO sheet.

4. Main information

4. Purchase order

- Reference : automatically set when order is created, but you can customize it
- Status : the status define how the order is considered by ERP :
 - o New : order is being created, it is not considered by ERP
 - o Waiting for delivery : supplier has been notified about the PO and will ship the goods : ERP is expecting the products and then, it updates supply needs and product availability message on the website.
 - o Partially delivered : some product have been delivered, others are expectedo Complete :order is done
- Supplier : supplier associated to the PO
- Comments : free area
- Shipping fees rate : tax rate applied for shipping fees
- Shipping fees :
- Change rate : if you place purchase order in a different currency, this change rate will be applied
- Shipping date : Estimated date of delivery : if the product is out of stock, this date is displayed on the website to inform customers.

5. Add products

To add products in the purchase order, select tab « Add products » : you can use the form to search products and click on the search button, results will be displayed on the right. Then, fill quantity for the products you want to add and click on the « Add » link. Each time you select a product, it is added at the bottom of the screen. When you have selected all wanted products, click on the « save » button at the bottom.

| Skus | Name | Qty | Qty to purchase | PSL | Manufacturer | Select |
|----------|-----------|-----|-----------------|-----|---------------------|--------|
| iphone4s | Iphone 4S | 0 | -1 | * | Apple Computer, Inc | Add |

When a product is added to the purchase order, some information is filled automatically :

- Buying price : imported from the product sheet
- Supplier reference : imported from the product sheet

6. Printing

You can print the PO in PDF to send it to your supplier with the « print » button at the bottom of the screen.

7. Supplier notification

Once the PO is ready, you can send an email to your supplier with the PO PDF in attachment : click on the « Notify supplier » button to send the email.

When you notify supplier, PO status is toggled to « Waiting for delivery ».

You can customize the email in modules > administration > erp > configure.

8. Declare deliveries

When the merchandize arrives in you warehouse, you must declare the deliveries to update the data in ERP : go in the purchase order and select tab « Add delivery ».

Note : only order with status « Waiting for delivery » can have a new delivery.

5. Order fulfillment

| Qty | Ordered qty | Delivered qty | Remaining qty | Barcode | Reference | Location |
|-----|-------------|---------------|---------------|---------|-----------|----------|
| 0 | 4 | 4 | 4 | | iphones5 | |
| -1 | 3 | 1 | 3 | | iphones5 | |

For each product, you can set :

- Quantity received
- Barcode / EAN
- Location in the warehouse

If the delivery matches to the quantities ordered, you can click on the « all products are delivered » button to confirm a complete delivery. When you confirm the delivery with the save button, ERP apply the deliveries :

- Create new stock movement to put the products back to stock
- Reserve product for pending backordered orders
- If all PO products have been delivered, the PO status is set to « Complete »

You can view all deliveries in the « deliveries » tab :

| Date | Product | Location | Qty | Description |
|---------------------|--------------------------------------------------------|----------|-----|-------------|
| 2012-01-12 20:47:02 | iPhone 4S | | 4 | Restocking |
| 2012-01-12 20:47:02 | iPhone 5 | | 3 | Restocking |
| 2011-12-15 19:28:25 | iPod touch | | 561 | Restocking |
| 2011-12-15 19:27:57 | Belkin Leather Folio for iPod nano - Black / Chocolate | | 772 | Restocking |
| 2011-12-15 19:26:22 | Belkin Leather Folio for iPod nano - Black / Chocolate | | 18 | Restocking |
| 2011-12-15 19:25:40 | Belkin Leather Folio for iPod nano - Black / Chocolate | | 7 | Restocking |
| 2011-12-15 19:24:47 | Belkin Leather Folio for iPod nano - Black / Chocolate | | 3 | Restocking |

5. Order fulfillment

The order preparation tool, available in the section Orders > Picking, allows you to optimize the shipping time while reducing the risk of errors (sending unpaid orders, wrong product...).

The ERP Module splits orders in four tabs. On each tab, products of orders follows the codification below:

- Green : product booked for order
- Red : missing product

In order to define the status orders that appear in each tab, go to : Modules > Administration > ERP pour Prestashop > Configurer > « Order fulfillment » tab

1. Configuration

The module configuration section is available by the tab Modules > Administration > ERP for Prestashop > Configurer.

You will find on this first tab "Fullfill" three very important lists for the module :

- The first list "Pending order status" is for the order status to be available for their shipment. All orders with status selected in this list will be displayed in the "Fullstock" tab of the ERP if all products are in stock.
- The second list "Ignored order status" set the orders that appear in the list of "Ignored orders" tab of the ERP. For example, if you select the status "Waiting for payment" all orders with this status will be displayed in the "Ignored orders" tab.
- Finally, the last list "Statutes to not display in order fulfillment" defined the statutes of all orders will not be displayed in the order fulfillment part of the ERP. For example status "Cancelled", "Guarantee"... will be selected.

2. Fullstock Orders

This tab will allow you to view completed order, ie paid orders for which products are in stock and that you can send in their entirety.

5. Order fulfillment

On the configuration screen, you can define status order which will be considered complete by selecting the desired status in the list : « Allowed status for pending sales orders ». You can define several status by keeping the « Ctrl » keyboard touch pressed.

The screenshot shows the 'Fullfill orders' interface. At the top, there is a navigation bar with icons for Catalog, Customers, Orders, Payment, Erp, Shipping, Stats, Modules, Employees, Preferences, and Tools. Below this is a breadcrumb trail: Back Office > Erp > Fullfill orders. A yellow bar contains five steps: 1 - Select orders, 2 - Print picking list, 3 - Download invoices & packing slip, 4 - Shipping labels, 5 - Confirm shipment. Below the steps are tabs for Fullstock, Stockless, Ignored, and Selected. A 'Mass action' dropdown and a 'Submit' button are on the right. The page shows 'Page 1 of 1 pages | View 10 per page | 3 records found'. A table lists three orders:

| Date | Order id | Customer | Products | Shipping method | Status | View |
|---------------------|----------|-------------|-------------------------------------------|-----------------|------------------|------|
| 2013-04-26 16:35:49 | 000001 | TestP TestN | 1x MacBook Pro | My carrier | Payment accepted | View |
| 2013-04-26 16:34:28 | 000002 | TestP TestN | 1x iPod shuffle - Couleur : Vert | My carrier | Payment accepted | View |
| 2013-04-26 16:36:16 | 000003 | TestP TestN | 1x iPod touch - Capacité : 8Go 1x iPod | My carrier | Payment accepted | View |

3. Stockless Orders

This tab will allow you to view stockless orders, ie orders for which at least one product is missing.

Depending on your Prestashop version ($\geq 1,5$) you can send partial orders.

Orders whose status will be selected in the lists « Allowed status for ignored » and « Status not to display in order fulfillment » in the configuration screen will not be displayed in this tab. You can define several status by keeping the « Ctrl » keyboard touch pressed.

The screenshot shows the 'Fullfill orders' interface with the 'Stockless' tab selected. The breadcrumb trail is Back Office > Erp > Fullfill orders. The yellow bar contains the same five steps as the previous screenshot. Below the steps are tabs for Fullstock, Stockless, Ignored, and Selected. A 'Mass action' dropdown and a 'Submit' button are on the right. The page shows 'Page 1 of 1 pages | View 10 per page | 2 records found'. A table lists two orders:

| Date | Order id | Customer | Products | Shipping method | Status | View |
|---------------------|----------|-------------|-------------------------------------------|-----------------|-------------------------|------|
| 2013-04-26 16:27:50 | 000001 | TestP TestN | 1x MacBook Pro | My carrier | Awaiting cheque payment | View |
| 2013-04-26 16:29:06 | 000003 | TestP TestN | 1x iPod touch - Capacité : 8Go 1x iPod | My carrier | Awaiting cheque payment | View |

4. Ignored Orders

To avoid to ship unpaid orders, ERP allows you to define ignored status in order to avoid unwanted shipping.

In the configuration screen, you can set the order status ignored by selecting the "Status commands ignored" list. Generally, order status "Pending payment" is selected in this list. You can define several status by keeping "Ctrl" keyboard touch pressed.

5. Order fulfillment

Catalog Customers Orders Payment **Erp** Shipping Stats Modules Employees Preferences Tools

Supply Needs Purchase Orders **Fullfill orders**

Back Office > Erp > Fullfill orders

1 - Select orders 2 - Print picking list 3 - Download invoices & packing slip 4 - Shipping labels 5 - Confirm shipment

Fullstock Stockless **Ignored** Selected

Mass action : Submit

Page 1 of 1 pages | View 10 per page | 3 records found Filter Reset filter

| Date | Order id | Customer | Products | Shipping method | Status | View |
|---------------------|----------|-------------|------------------------------------------|-----------------|----------|------|
| 2013-04-26 16:40:33 | 000001 | TestP TestN | 1x-MacBook-Pro | My carrier | Canceled | View |
| 2013-04-26 16:40:27 | 000002 | TestP TestN | 1x-iPod-shuffle -Couleur :Vert | My carrier | Canceled | View |
| 2013-04-26 16:40:20 | 000003 | TestP TestN | 1x-iPod-touch -Capacité : 8Go 1x-iPod | My carrier | Canceled | View |

5. Selected orders

This tab allows you to view all orders with the status « Preparation in progress ».

Whatever the tab, to add an order to the orders list in preparation, check orders and select the option « Add to selection » in the action menu. Then click on the « Submit » button.

Selected orders are now in this tab and you are ready to send !

Catalog Customers Orders Payment **Erp** Shipping Stats Modules Employees Preferences Tools

Supply Needs Purchase Orders **Fullfill orders**

Back Office > Erp > Fullfill orders

1 - Select orders 2 - Print picking list 3 - Download invoices & packing slip 4 - Shipping labels 5 - Confirm shipment

Fullstock Stockless Ignored **Selected**

Mass action : Submit

Page 1 of 1 pages | View 10 per page | 3 records found Filter Reset filter

| Date | Order id | Customer | Products | Shipping method | Status | View |
|---------------------|----------|-------------|-------------------------------------------|-----------------|-------------------------|------|
| 2013-04-26 16:38:47 | 000001 | TestP TestN | 1x MacBook Pro | My carrier | Preparation in progress | View |
| 2013-04-26 16:38:48 | 000002 | TestP TestN | 1x iPod shuffle - Couleur : Vert | My carrier | Preparation in progress | View |
| 2013-04-26 16:38:49 | 000003 | TestP TestN | 1x iPod touch - Capacité : 8Go 1x iPod | My carrier | Preparation in progress | View |

6. Picking List

Once orders are selected, you can print the picking list with button « 2 – Picking list ». This PDF summarizes every products you need to do packing.

Note : picking list is a global view of the products for all orders. If a product is in several orders, it will be displayed only once in the picking list, but with a quantity matching to all orders that contain it.

7. Download documents

Once you have picked all products in your warehouse and bring products back to the preparation table, you can generate one PDF with all invoices & packing slip for selected orders using button “3 – Download invoices & packing slip”.

8. Export to carrier software

The next step is to export order information to your shipping software to generate tracking numbers and print shipping labels.

Every shipping software can :- Import a csv file with order information to print shipping labels- Export a csv file with order number & tracking number to export it in Prestashop.

1. Configuration

ERP exporte order information to each carrier software based on the shipping method. So you must define association between shipping method and carrier software in Modules > Administration > ERP > Configure :

In the “Carrier template” tab are displayed carrier software supported by ERP. (If you need another one, please contact us).For each software, you must select the Prestashop shipping method.

2. Export order information to shipping software

From order fulfillment screen, click on button “4 – Shipping labels” :

To download csv file to import in carrier software, click on the Shipping Software name in “Download order list for shipping software section”.

3. Import tracking numbers

Once labels are printed, you must import tracking numbers in prestashop to store them in order and inform customers. From the shipping software, export the trackings numbers, go back in step #4 in Order fulfillment screens, select the carrier template in the drop down menu, select the csv file and click on “Commit” button. Then, tracking numbers are saved in orders.

9. Customer notification

Last step is to inform customers about the shipping : for this, click on the “Confirm orders” button to change order status and send an email to your customers.

6. Miscellaneous

1. Product availability

ERP is able to display advanced availability message on website if a product is not in stock. When product is out of stock and backorders are allowed, ERP will display :

- If a purchase order is expected, the PO delivery date is displayed
- Else, the default availability based on the supplier default delay is shown.

