# Prestashop ERP

# User manual

# Summary

# Overview

Prestashop ERP is an addon to manage supply, purchasing and order fullfilment within the Prestashop admin panel.

The main features are :

- **Supply needs** : the module keep up to date a list of the products you need to purchase because you sold backordered items or when the stock level reaches the warning stock level. You can easily filter the list by supplier and click a new purchase order
- **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
- **Order fullfilment** : thanks to this wizard, you instantly see what orders can be fullfilled and what orders are pending supply or payment. Select orders you want to fullfill, print the picking list, mass print invoiceds / 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.

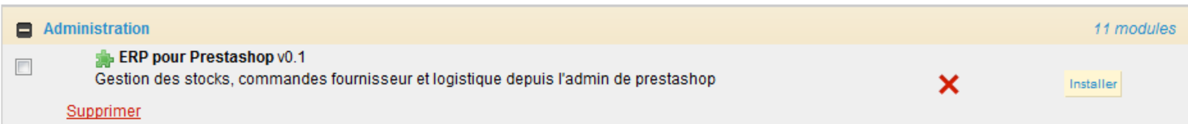
# Installation

## Files copy

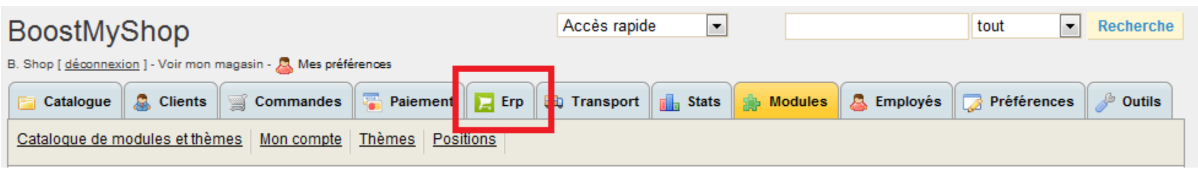
Before you upload files on your server, you must rename directory « admin_bms » with the name of your admin panel.Then, upload all files on your server.

## 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 visibile :



## Hooks installation

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

### Supplier sheet

- Edit file : /admin/tabs/AdminSuppliers.php
- Line : 201
- Add this code :

```
'.Module::hookExec('supplierSheetForm', array('supplier' => $supplier)).'
```

### Product sheet (back office)

- Edit file : /admin/tabs/ AdminProducts.php
- Line : #2670 (Presta 1451)
- Add this code :

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

### Product sheet (front)

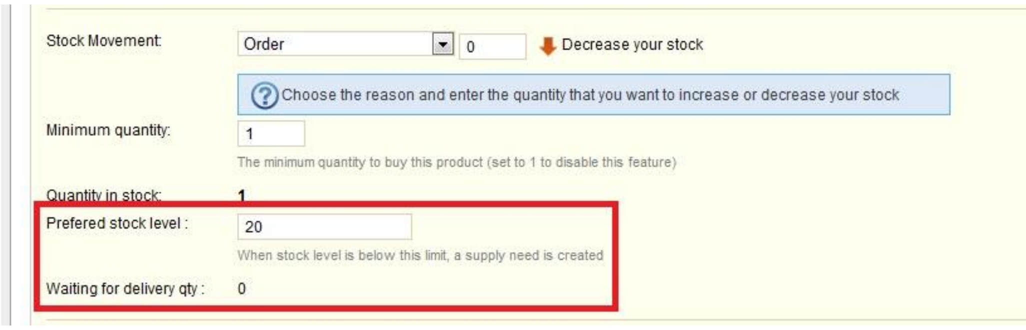
- Edit file : /themes/[votre_theme]/product.tpl
- Lige : 353
- Add this code :

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

<p id="pSupplyDate" {if $product->quantity > 0 || $allow_oops || $product->getSupplyDate() == '-'}
style="display:none;" {/if}>

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

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

</p>

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

# Supply needs

## Prefered stock level

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




The prefered 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, prefered stock level is set to 0 for every products.

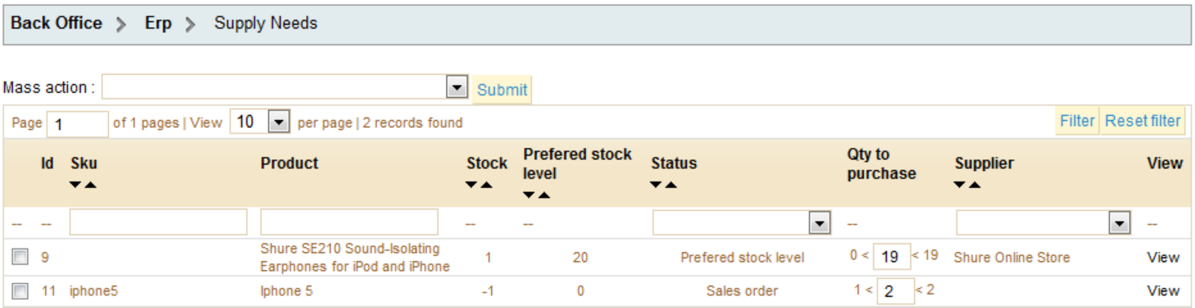
## Backordered products

Basiscally, Prestashop can handle backordered products : a backordered product is a product sold without stock to fullfill 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.


## Supply needs

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




)

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)
- **Prefered stock level :** see above
- **Status** : 3 values can be displayed
  - **Sales order** : you must purchase the product to fullfill a sales order.
  - **Prefered stock level** :you must purchase the product because the stock level is below the prefered stock level
  - **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

### Create a purchase order

You can easily create a Purchase Order from supply needs :

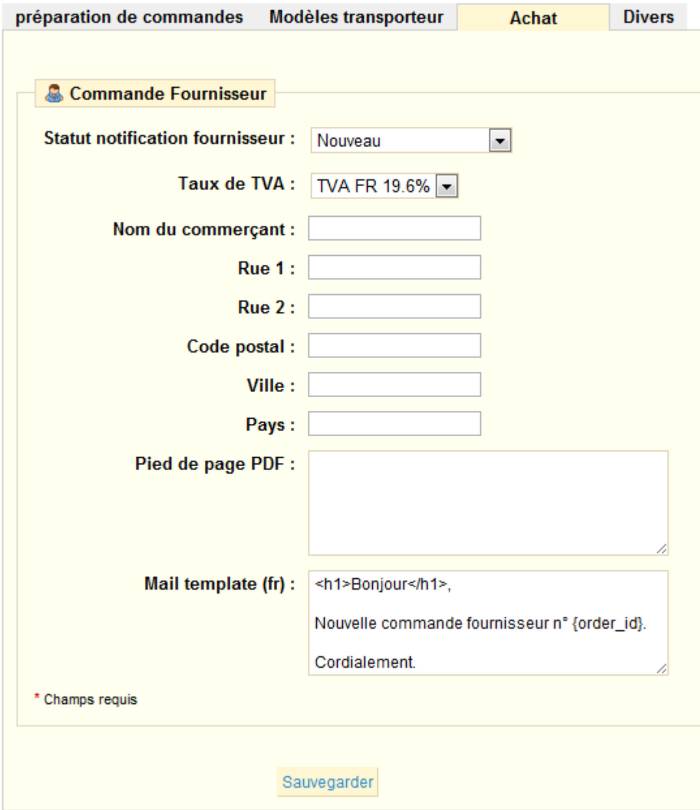
- Filter products list (with suppliers for example)
- Tick every products you want to add to the purchase order : you must also select the quantity for each product. Around the quantity field, the system displays a minimum quantity and a maximum quantity :
  - Minimum quantity : quantity needed to fullfill orders
  - Maximum quantity : quantity needed to fullfill orders AND to reach the prefered 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.

## Purchase order

## Configuration

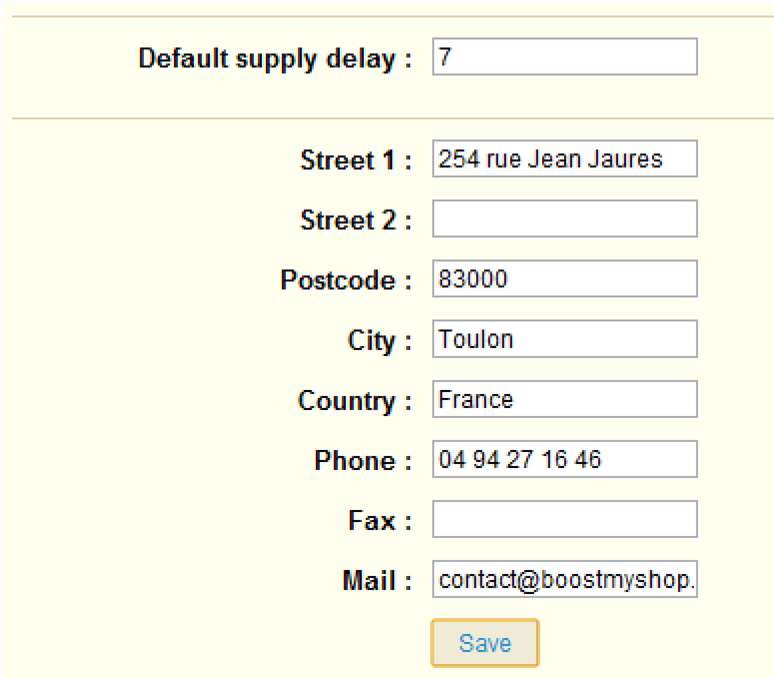
To configure ERP, go in menu Modules > Administration > Erp pour Prestashop > Configure > Purchase :




- **Notify suppliuer status** : when you send PO by email to the supplier, ERP can toggles 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

## 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

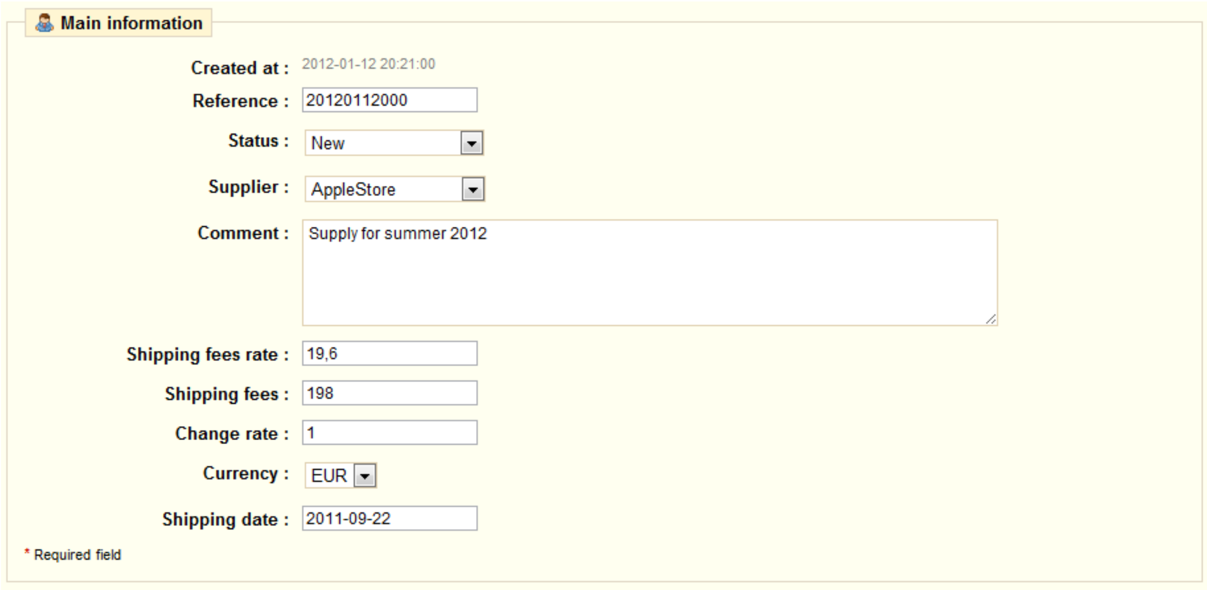
## Create a new Purchase Order

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.

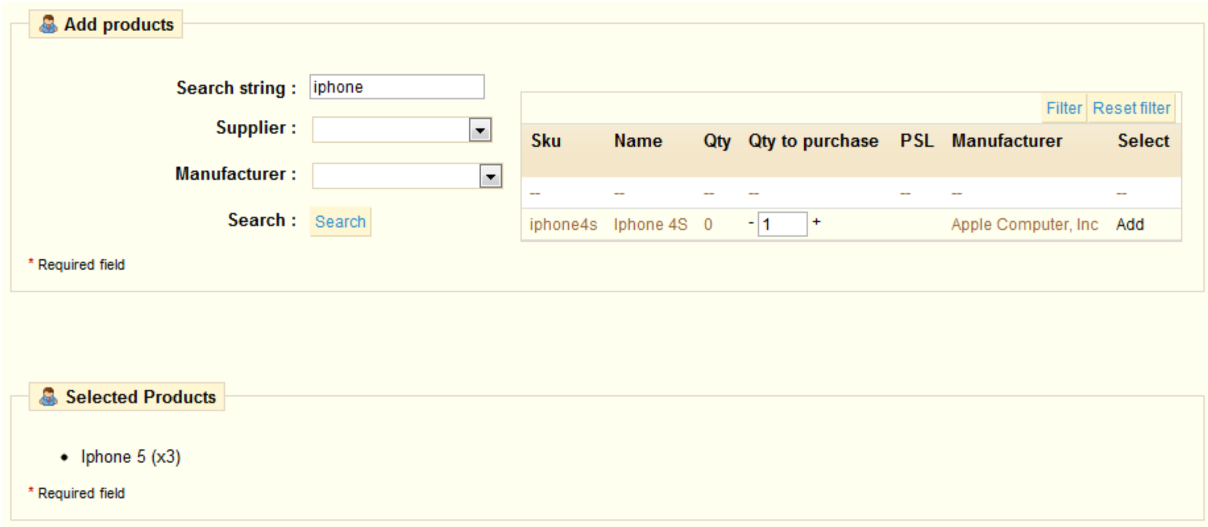
## Main information




- **Reference** : automatically set when order is created, but you can customize it
- **Status** : the status define how the order is considered by ERP :
  - **New** : order is being created, it is not considered by ERP
  - **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.
  - **Partially delivered** : some product have been delivered, others are expected
  - **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.

## 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.




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

## Printing

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

## 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

## 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.*

Main | Products | Add Products | **Add Delivery** | Delivery

Tous les produits sont reçu

Page 1 of 1 pages | View 10 per page | 2 records found — Filter | Reset filter

| Sku | Product | Qty | Ordered qty | Delivered qty | Remaining qty | Barcode | Reference | Location |
|---|---|---|---|---|---|---|---|---|
| -- | -- | -- | -- | -- | -- | -- | -- | -- |
| iphone4s | Iphone 4S | 0 | 4 | - 2 + | 4 | | iphone4s | |
| iphone5 | Iphone 5 | -1 | 3 | - 1 + | 3 | | iphone5 | |

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 :

Main | Products | Add Products | Add Delivery | **Delivery**

Page 1 of 1 pages | View 10 per page | 7 records found — Filter | Reset filter

| 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 |

# Order fullfilment

Order preparation wizard is available under menu ERP > Fullfill orders. Bascially, the system dispatches orders in 3 tabs :

- Ignored : not paid orders
- Stockless : this orders have at least one missing / backordered product
- Fullstock : contains orders that you can fullfill completely

## Ignored orders

To prevent operator to ship a not paid order by error, you can set conditions to set an order as ignored or valid. Basically, we configure ERP to ignore order pending payment or fraud suspected.

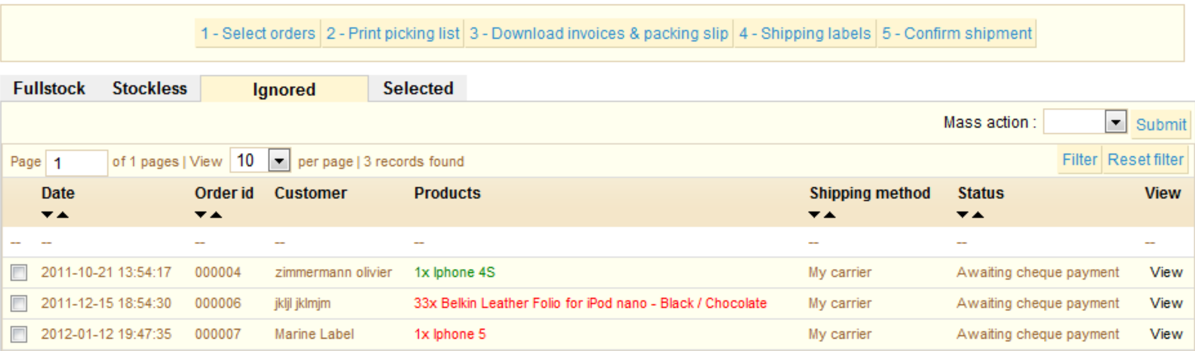
To select the order statuses that set an order as ignored, go in menu Modules > Administration > Erp > Configure

## Order selection

The first step for order fullfillment is to select order that you are going to prepare. You can process several batch with several orders every days.

To help you to select orders, ERP dispatches orders in 3 tabs :

- **Ignored** : not paid orders
- **Stockless** : this orders have at least one missing / backordered product
- **Fullstock** : contains orders that you can fullfill completely

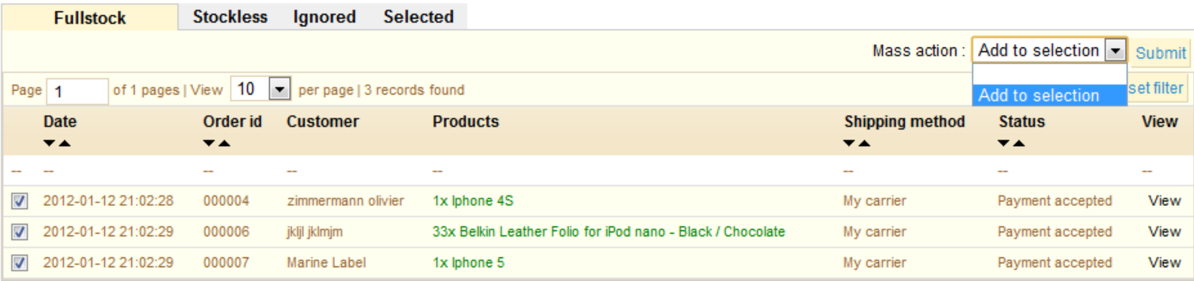



| | Date | Order id | Customer | Products | Shipping method | Status | View |
|---|---|---|---|---|---|---|---|
| -- | -- | -- | -- | -- | -- | -- | -- |
| | 2011-10-21 13:54:17 | 000004 | zimmermann olivier | 1x Iphone 4S | My carrier | Awaiting cheque payment | View |
| | 2011-12-15 18:54:30 | 000006 | jkljl jklmjm | 33x Belkin Leather Folio for iPod nano - Black / Chocolate | My carrier | Awaiting cheque payment | View |
| | 2012-01-12 19:47:35 | 000007 | Marine Label | 1x Iphone 5 | My carrier | Awaiting cheque payment | View |

In every tabs, ERP display order products according to the following codes :

- **Green** : product is reserved for order
- **Red** : product is missing for order (backordered)

To select orders from any tab, check orders and in the mass action menu, select « Add to selection » item. Then, click on submit button.




Selected orders are now in « Selected » tab and you are ready to process them.

## 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.

## 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".

## Export to carrier software.

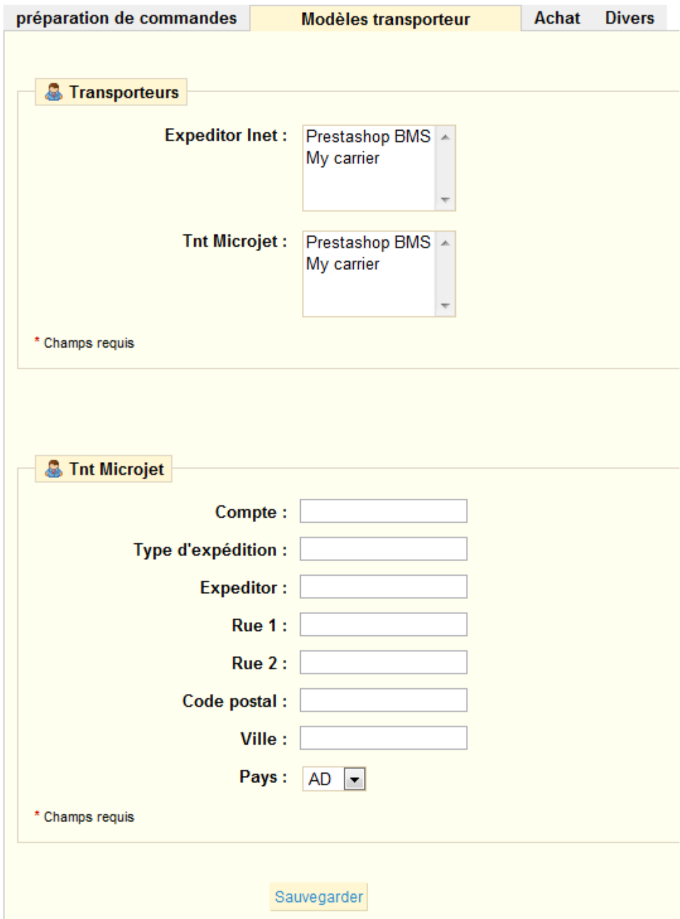
The next step is to export order information to your shipping software to generate tracking numbers and print shipping labels.

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.

### 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 :

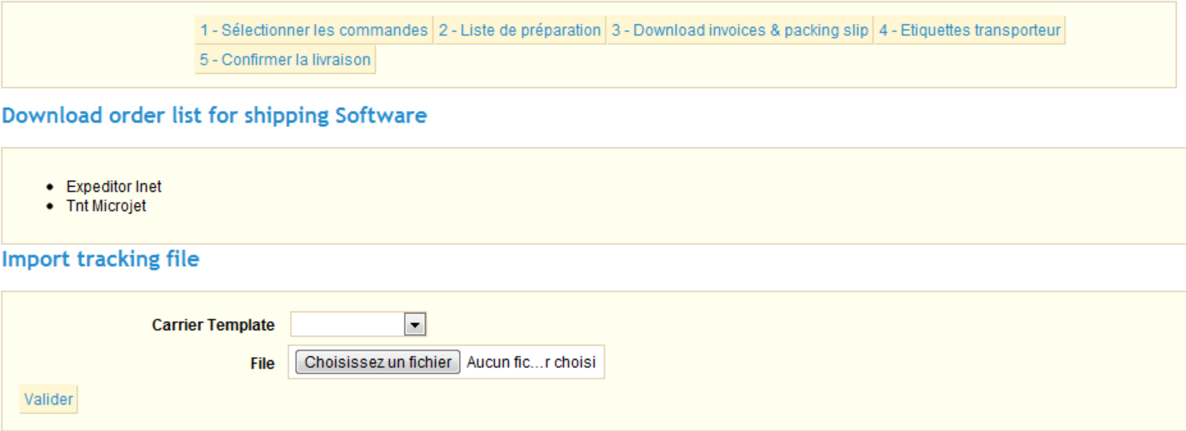



In the “Carrier template” tab are displayed carrier software supported by ERP. (If you need another one, please contact us).

For each software, you must select the Prestashop shipping method.

## 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".

### 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.

## 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.

# Miscellaneous

## 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.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