

Magespace

Magento 2 Order Fulfillment Guide



1. Introduction

Purchase Management is a Magento 2 extension, which helps you manage purchasing and receiving stock from suppliers. All information about Purchase Order, Quotation and Suppliers are kept track and automatically updated in the system. The extension is:

- Compatible with Magento CE 2.1.0, 2.1.1, 2.1.2 & 2.2.1
- Open source 100%
- License Certificate valid for 1 live Magento installation and unlimited test Magento installations
- Easy to install and configure
- User-friendly interface

2. How to manage suppliers

2.1. Add a new supplier

To add a new supplier to the system, you should go to **Purchase Management => Manage Supplier** (in section Supplier) then click on **Add New Supplier** button. There are two types of information you have to enter in order to add a new supplier: Supplier Information & Supplier Address

- Supplier Information: Supplier Code, Supplier Name, Contact Person and Email are required fields. You should add description for each supplier to differentiate between this supplier and the rest. Do not forget to *enable* the supplier.

Supplier Information

Supplier Code *

Supplier Name *

Contact Person *

Email *

Description

Status
Enable

- **Supplier Address:** This field contains all address information of the supplier. Since fields here are optional, you do not have to fill all of them.

Supplier Address

Telephone

Fax

Street

City

Country
--Please Select--

Region

Zip/Postal Code

Website

Choose **Save** to finish entering supplier information. Now you need to assign products to this supplier. After you click on **Save** button, your screen will appear like following:

Products

Add Product

Import Product

Delete Product

Search

Reset Filter

0 records found

20 per page

1 of 1

	SKU	Supplier SKU	Cost	Tax	Action
Any					
We couldn't find any records.					

There are two ways to assign products to the supplier: Add product manually and import products with a csv file. If you choose to upload products manually, remember to enter related information for each one: Supplier SKU, Cost and Tax. Otherwise, importing products in mass is recommended. A csv file sample is offered. In case you have a mistake on importing products, Delete Product button can help.

2.2. Manage supplier

To have an overview of Supplier, go to **Purchase Management => Manage Supplier**. Each warehouse comes with Supplier Code, Total SKU, Purchase Order Value, Status and Date for last purchase order. You can view or click to edit the detail of each one.

Manage Supplier

admin

Add New Supplier

Filters

Default View

Columns

Actions

3 records found

20 per page

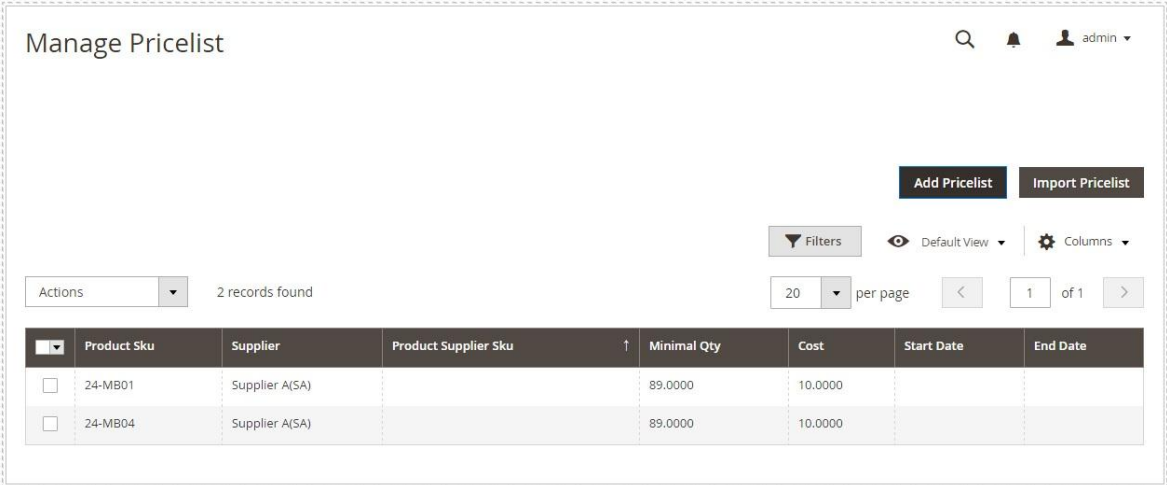
1 of 1

	Supplier Code	Total SKU	Purchase Order Value	Last Purchase Order On	Status	Action
<input type="checkbox"/>	SB	2037	\$0.00		Enable	View
<input type="checkbox"/>	SC	11	\$0.00		Enable	View
<input type="checkbox"/>	SA	2046	\$0.00	Nov 21, 2016	Enable	View

2.3. Manage pricelist

“Pricelist is a list of prices for the goods offered by a supplier. It usually consists of Minimal Qty and Cost”

Go to **Purchase Management => Manage Pricelist**



Manage Pricelist

2 records found

20 per page

<input type="checkbox"/>	Product Sku	Supplier	Product Supplier Sku	Minimal Qty	Cost	Start Date	End Date
<input type="checkbox"/>	24-MB01	Supplier A(SA)		89.0000	10.0000		
<input type="checkbox"/>	24-MB04	Supplier A(SA)		89.0000	10.0000		

There are two ways to add pricelist into the system:

- Select **Add Pricelist** button manually. With this method, you need to select products and enter required information for each: Minimal Qty and Cost. If you have 2 Minimal Qty for a product, you must select this product and enter information twice.
- If you got the pricelist from suppliers, it is much easier to import them into Purchase Management with a csv file.

2.4. Supplier settings

There is only one thing you need to configure for Supplier. Please go to **Purchase Management => Supplier** (in Settings section):

If you choose **Yes** the system will automatically use and update cost from pricelist to purchase order.

3. How to manage quotation

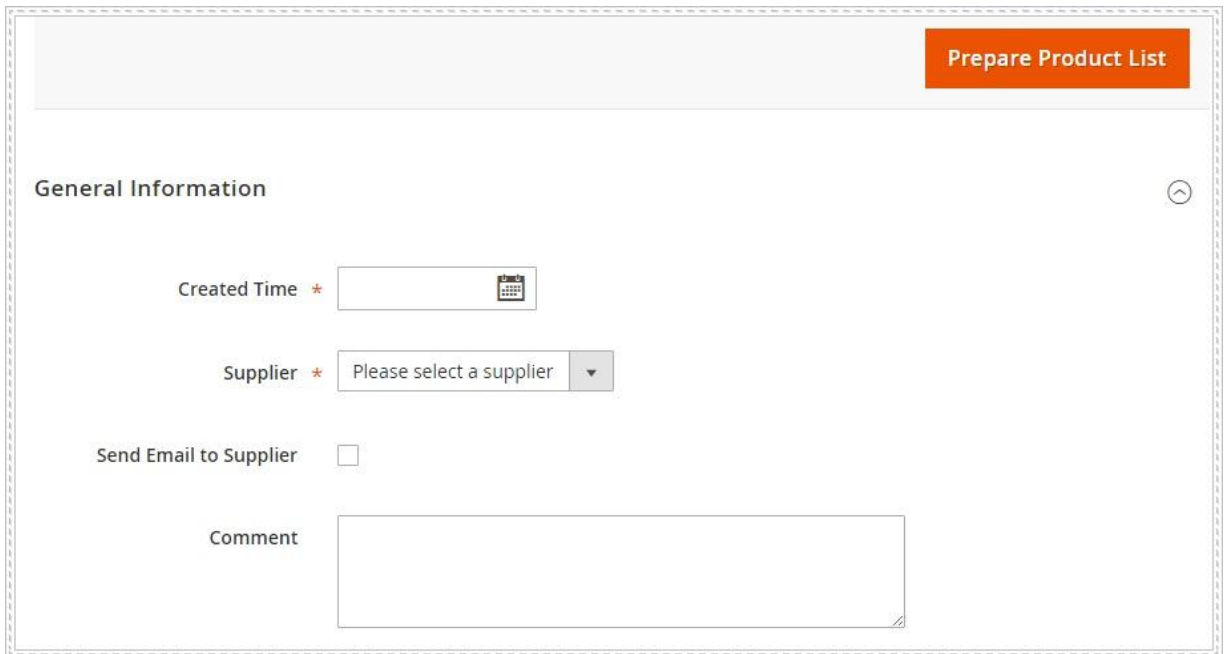
3.1. Create a new quotation

“A quotation (or a request for quotation) is the proposal of price and quantity of goods that store owners send to suppliers. The quotation will become purchase order when a seller sends confirmation of price and availability of products stated in the quotation.”

To create a new quotation, please go to **Purchase Management => Create Quotation** and choose **Create Quotation** button

3.1.1. Fill out General Information Form

After choose to create a new quotation, you will be navigated to this view:



The screenshot shows a web form for creating a quotation. At the top right, there is an orange button labeled "Prepare Product List". Below this, the form is titled "General Information" with a collapse icon on the right. The form contains four fields: "Created Time" with a red asterisk and a calendar icon; "Supplier" with a red asterisk and a dropdown menu showing "Please select a supplier"; "Send Email to Supplier" with an unchecked checkbox; and "Comment" with a large text area. The entire form is enclosed in a dashed border.

As can be seen, it is compulsory to choose Created Time and Supplier for the pricelist. Tick on the box next to Send Email to Supplier if you want an email to be automatically sent to supplier address (This email address can be changed in **Manage Supplier** section). Also, adding further comments is allowed here.

After that, click on **Prepare Product List** for the next step

3.1.2. Prepare Product List

In this step, there are 5 ways for you to prepare product list:

- Import products via a CSV file
- Prepare product list based on supply need forecast
- Prepare back order products (Back orders products are ordered by customers but not available in stock now)
- Prepare low stock products
- Prepare product list manually with **All Supplier Products** button

The screenshot displays a web interface for managing a product list. At the top, there are five buttons: 'Import Products', 'Supply Need Products', 'Back Order Products', 'Low Stock Products', and 'All Supplier Products'. Below these buttons is a search bar with a 'Search' button and a 'Reset Filter' link. To the right of the search bar, it indicates '3 records found'. Further right, there are pagination controls showing '20 per page' and '1 of 1' records. The main part of the interface is a table with the following columns: 'SKU', 'Product Name', 'Supplier SKU', 'Current Cost', 'Purchase Cost', 'Tax (%)', 'Discount (%)', 'Qty Ordering', and 'Action'. The table contains three rows of data, each with a checkbox in the 'Action' column and a 'Delete' link. The first row is for '24-MB02 Fusion Backpack' with a current cost of \$0.00, purchase cost of 70, tax of 0, discount of 2, and quantity of 20. The second row is for '24-MB06 Rival Field Messenger' with a current cost of \$0.00, purchase cost of 20, tax of 0, discount of 2, and quantity of 40. The third row is for '24-MB05 Wayfarer Messenger Bag' with a current cost of \$0.00, purchase cost of 43, tax of 0, discount of 3, and quantity of 60.

	SKU	Product Name	Supplier SKU	Current Cost	Purchase Cost	Tax (%)	Discount (%)	Qty Ordering	Action
Any				From To	From To	From To	From To	From To	
<input checked="" type="checkbox"/>	24-MB02	Fusion Backpack		\$0.00	70	0	2	20	Delete
<input checked="" type="checkbox"/>	24-MB06	Rival Field Messenger		\$0.00	20	0	2	40	Delete
<input checked="" type="checkbox"/>	24-MB05	Wayfarer Messenger Bag		\$0.00	43	0	3	60	Delete

Apart from importing products via a CSV file, you need to enter Purchase Cost, Tax, Discount and Qty Ordering for each product. Editing in line is allowed here. After enter all required fields, click **Save** button and Order Totals is automatically calculated.

Order Totals

Subtotal	\$4,780.00
Shipping Cost	\$0.00
Discount	-\$121.40
Tax	\$0.00
Grand Total (excl. Tax)	\$4,658.60
Grand Total (incl. Tax)	\$4,658.60

3.1.3. Edit Shipping and Payment method

It is time to set up Shipping and Payment method for the quotation:

Shipping and Payment

Shipping Address

Shipping Method

Select a shipping method ▼

Shipping Cost

0.0000

Start Shipping Date

Expected Delivery Date

Payment Term

Select a payment term ▲

Order Place Via

N/A ▼

- Enter the address you want the stock to be shipped to
- Select a shipping method for the quotation
- Estimate and enter the shipping cost

- Set start shipping and expected delivery date
- Select the payment term
- Choose the way to place order: N/A, Email, Phone, Fax, Vendor website

After filling out the form, do not forget to save all the changes. Now you can **Send Request** to the suppliers or **Print** the quotation. If you want to Convert Quotation to P.O, read more here.

View Quotation #QUO000000005

Cancel Send Request Print Save Convert Quotation to PO

3.2. Manage Quotation

To manage all created quotation, please go to **Purchase Management => Quotation:**

Manage Quotation

Create Quotation

Filters Default View Columns Export

3 records found 20 per page 1 of 1

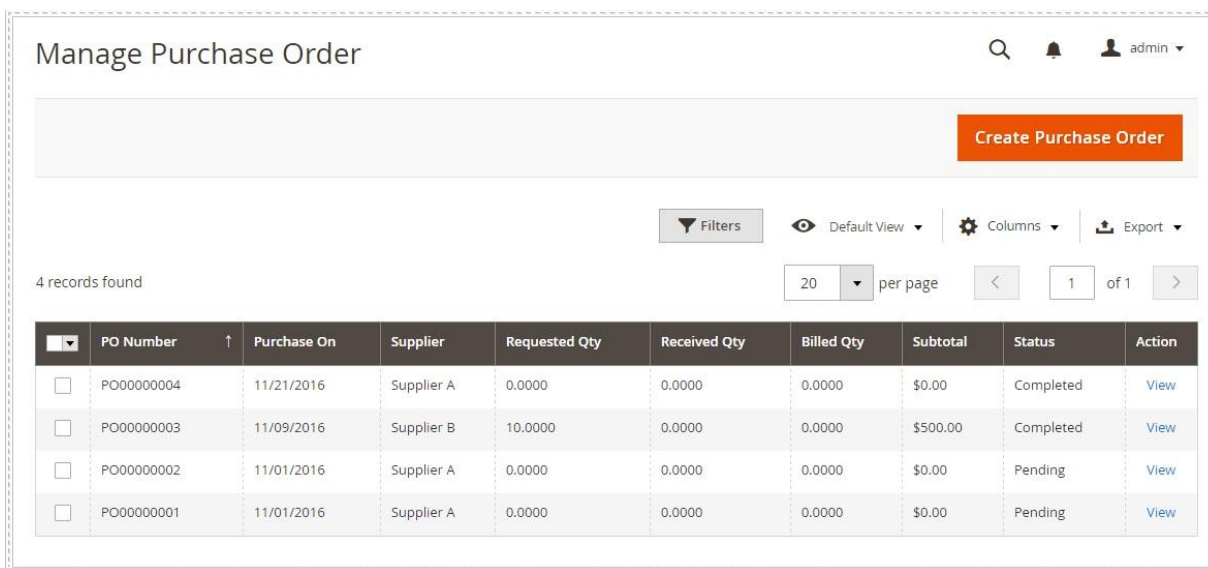
	Quotation Number	Create At	Supplier	Requested Qty	Subtotal	Status	Action
<input type="checkbox"/>	QUO000000005	11/29/2016	Supplier C	120.0000	\$4,780.00	Pending	View
<input type="checkbox"/>	QUO000000004	11/08/2016	Supplier B	0.0000	\$0.00	Canceled	View
<input type="checkbox"/>	QUO000000001	11/01/2016	Supplier A	0.0000	\$0.00	Pending	View

Each quotation is listed with some related information: Created Date, Supplier, Requested Qty, Subtotal and Status. Please notice that quotations, which are converted into PO will be removed from this list.

4. How to submit the additional data to the place order

“Purchase Order (PO) is a document sent to a specific supplier to purchase more inventories for your warehouses. It contains descriptions, quantities, prices, discounts, payment terms, date of performance or shipment, other associated terms and conditions.”

To create/ edit purchase orders, manage deliveries from suppliers to warehouses and return items from warehouses to suppliers, go to **Purchase Management => Purchase Order**. Then you will see the **Manage Purchase Orders** page as follows:



Manage Purchase Order

Create Purchase Order

Filters Default View Columns Export

4 records found 20 per page 1 of 1

	PO Number	Purchase On	Supplier	Requested Qty	Received Qty	Billed Qty	Subtotal	Status	Action
<input type="checkbox"/>	PO00000004	11/21/2016	Supplier A	0.0000	0.0000	0.0000	\$0.00	Completed	View
<input type="checkbox"/>	PO00000003	11/09/2016	Supplier B	10.0000	0.0000	0.0000	\$500.00	Completed	View
<input type="checkbox"/>	PO00000002	11/01/2016	Supplier A	0.0000	0.0000	0.0000	\$0.00	Pending	View
<input type="checkbox"/>	PO00000001	11/01/2016	Supplier A	0.0000	0.0000	0.0000	\$0.00	Pending	View

4.1. Create a New Purchase Order Manually

In order to create a new purchase order manually, click on the **Create Purchase Order** button on the top-right of the page or choose the **Create Purchase Order** tab.

When creating Purchase Order, you will see a tab showing steps at which Purchase Order is. They are **New**, **Pending**, **Processing**, and **Completed**.

4.1.1. General Information

In this tab, you should configure all the required fields marked with a red star, such as Created Time and Supplier.

General Information

Created Time *

Supplier * Please select a supplier ▼

Send Email to Supplier ☐

Comment

There are several optional fields to help you add extra information to your purchase order:

- Send Email to Supplier: By ticking the checkbox, the extension will automatically send information to the supplier via email right after creating the purchase order.
- Comment: Add extra information for the purchase order. Suppliers will be notified about it.

After that, click on **Prepare Product List** button to continue.

4.1.2. Add products to the Purchase Order

In this step, there are 5 ways for you to prepare product list:

- Import products via a CSV file
- Prepare product list based on supply need forecast
- Prepare back order products (Back orders products are ordered by customers but not available in stock now)
- Prepare low stock products
- Prepare product list manually with **All Supplier Products** button

Import Products

Supply Need Products

Back Order Products

Low Stock Products

All Supplier Products

Search

Reset Filter

3 records found

20 per page

1 of 1

	SKU	Product Name	Supplier SKU	Current Cost	Purchase Cost	Tax (%)	Discount (%)	Qty Ordering	Action
Any				From To	From To	From To	From To	From To	
<input checked="" type="checkbox"/>	24-MB02	Fusion Backpack		\$0.00	70	0	2	20	Delete
<input checked="" type="checkbox"/>	24-MB06	Rival Field Messenger		\$0.00	20	0	2	40	Delete
<input checked="" type="checkbox"/>	24-MB05	Wayfarer Messenger Bag		\$0.00	43	0	3	60	Delete

Apart from importing products via a CSV file, you need to enter Purchase Cost, Tax, Discount and Qty Ordering for each product. Editing in line is allowed here. After enter all required fields, click **Save** button and Order Totals is automatically calculated.

Order Totals	
Subtotal	\$4,780.00
Shipping Cost	\$0.00
Discount	-\$121.40
Tax	\$0.00
Grand Total (excl. Tax)	\$4,658.60
Grand Total (incl. Tax)	\$4,658.60

4.1.3. Setting Shipping and Payment

It is time to set up Shipping and Payment method for the purchase order:

Shipping and Payment

Shipping Address

Shipping Method

Select a shipping method ▼

Shipping Cost

0.0000

Start Shipping Date

Expected Delivery Date

Payment Term

Select a payment term ▲

Order Place Via

N/A ▼

- Enter the address you want the stock to be shipped to
- Select a shipping method for the purchase order
- Estimate and enter the shipping cost
- Set start shipping and expected delivery date
- Select the payment term
- Choose the way to place order: N/A, Email, Phone, Fax, Vendor website

After this step, choose **Save** and the purchase order status will be changed to **Pending**. At this time, you can choose to Send Request to the supplier (Request will be sent to suppliers' email address), Print the purchase order, Cancel or Confirm Purchase Order.

You should double-check all information before confirming purchase order. After being confirmed, the purchase order status will be changed to **Processing**.

4.1.4. Receiving/Returning Items

When the purchase order is processing, you can be navigated to the following view and receive or return items:

View Purchase Order #PO00000005

Cancel
Save
Send Email
Print
Complete PO
Receive Items

Summary Information

Received Items

Returned Items

Invoices

Transferred Items

Shipping and Payment

General Information

There are five tabs on this view:

4.1.4.1. Summary Information

All information you entered in the previous steps will be summarized here: Created Time, Supplier, Payment Method, Shipping Method and Selected Products.

Summary Information

Created At

November 7, 2016

Payment Term

N/A

Purchase from

Supplier C (SC)

Shipping Method

N/A

Filters

Default View

Columns

Export

6 records found

20 per page

1 of 1

	Product ID	SKU	Product Name	Supplier SKU	Current Cost	Purchase Cost	Tax (%)	Discount (%)	Ordered Qty	Received Qty	Returned Qty	Billed Qty
<input type="checkbox"/>	1	24-MB01	Joust Duffle Bag		\$0.00	\$45.00	0	7	0.0000	0.0000	0.0000	0.0000
<input type="checkbox"/>	2	24-MB04	Strive Shoulder Pack		\$0.00	\$12.00	0	3	76.0000	0.0000	0.0000	0.0000
<input type="checkbox"/>	3	24-MB03	Crown Summit Backpack		\$0.00	\$74.00	0	2	34.0000	0.0000	0.0000	0.0000

4.1.4.2. Received Items

This tab shows all items in the purchase order you received. Each product goes with detail information: Receive Date, SKU, Product Name, Received Qty and Created By.

Received Items

Receive All Items Receive Items

Filters Default View Columns Export

0 records found

20 per page 1 of 1

Receive Date	SKU	Product Name	Supplier SKU	Received Qty	Created By
We couldn't find any records.					

There are two ways to receive items: **Receive Items** (This method is most suitable when you use partial shipment. You need to enter the receive date, select received products and fill Received Qty for each product) and **Receive All Items** (All products will be noted as received).

4.1.4.3. Returned Items

Return Items are records of items & Qty. returned against a purchase order. They are similar to Credit Memos of Sales Orders but these items are returns from your

If you only want to return some items in the purchase order, you can create a partial return by clicking on the **Return Order** button. The **Returned Product** page is as below:

Returned Product

Cancel Save

Returned Time

Returned Date *

Product List

Select Products

You need to enter the return date, select returned products and fill Returned Qty for each product. After that, you click on the **Save** button to save your work. The system will automatically subtracted the returned Qty. that you entered from the corresponding warehouse's inventory. Now, you can see the records of all returned items shown in the **Return Orders** tab.

4.1.4.4. Invoices

Multiple invoices can be created by products for one purchase order. When you click on **Create an Invoice** button, the **Create Invoice** page will be shown like below:

Create an Invoice (Purchase Order #PO00000005)

Cancel Save

Billed From Supplier C (SC)

Billed Date *

Product List

Select Products

You need to enter the billed date, select products and fill billed Qty, unit price, tax and discount for each product you want to create invoice for. After that, you click on the **Save** button to save your work. Now, you can see the records of all invoices shown in the **Invoices** tab.

Invoices

Create an Invoice

Filters Default View Columns Export

1 records found

20 per page 1 of 1

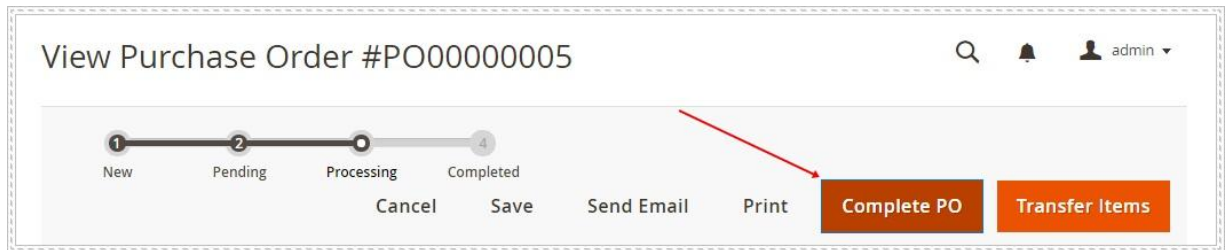
	Invoice ID	Billed Date	Invoice Total	Total Paid	Total Refund	Billed Qty	Action
<input type="checkbox"/>	00000001	2016-11-30	\$144.00	\$0.00	\$0.00	12,0000	View

4.1.4.5. Transferred items

After receiving products, you can transfer them to warehouses. Here is what we got in **Transferred Items** tab:

4.2. Complete Purchase Order

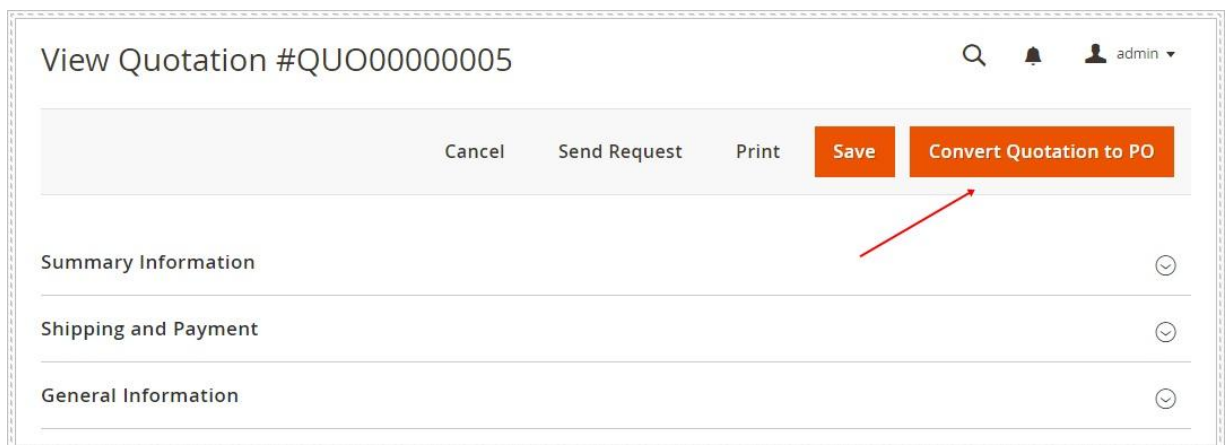
You can complete a purchase order by choosing **Complete PO** button. After completing PO, the status will be changed to **Completed**



You can complete a purchase order even when you have not received all requested items. When the purchase order status is completed, you cannot receive items anymore but you still transfer received items into warehouses after that.

4.3. Generate Purchase Order from Quotation

If you want to generate Purchase Order from Quotation, please go to **Purchase Management => Quotations**, click to choose a pending quotation. Then choose **Convert Quotation to PO** button.



After that, a new purchase order is generated. Now you can:

- [Setting Shipping and Payment](#)
- [Receiving/Returning items](#)
- [Complete Purchase Order](#)

4.4. Purchase Management Settings



There are 4 tabs to configure Purchase Management: Shipping method, Payment method, Payment term, Tax & Shipping. Go to **Purchase Management => Purchase Management** (in Settings section) to do these settings.

4.4.1. Shipping Method

This tab allows you to add/edit or delete Shipping methods for purchase orders. Click on **Add**, enter name of the shipping method and set status (Enable/Disable) for each on. Click on Trash bin icon in Action column to delete a shipping method. After all, do not forget to choose **Save Config** to save your work.

Shipping Method

Shipping method
[global]



Name	Status	Action
Cash on Delivery	Disabl ▼	
<input type="text"/>	Enable ▼	
<input type="button" value="Add"/>		

4.4.2. Payment Method

This tab allows you to add/edit or delete Payment methods for purchase orders. Click on **Add**, enter name of the payment method and set status (Enable/Disable) for each on. Click on Trash bin icon in Action column to delete a payment method. After all, do not forget to choose **Save Config** to save your work.

Payment Method

Payment method
[global]


Name	Status	Action
<input type="text" value="Cash"/>	Enable ▼	
<input type="text" value="Credit Cash"/>	Enable ▼	
<input type="button" value="Add"/>		

4.4.3. Payment Terms

This tab allows you to add/edit or delete Payment terms for purchase orders. Click on **Add**, enter name of the payment term and set status (Enable/Disable) for each on. Click on Trash bin icon in Action column to delete a payment term. After all, do not forget to choose **Save Config** to save your work.

Payment Term

Payment term
[global]

Name	Description	Status	Action
<input type="text"/>	<input type="text"/>	Enable ▼	
<input type="button" value="Add"/>			

4.4.4. Tax & Shipping

This tab allows you to edit Tax & Shipping for purchase orders. You need to uncheck all box next to **Use system value** before configure fields

Tax & Shipping

Default Shipping Cost

[global]

Leaving field blank to do not use default shipping method

☐ Use system value

Apply Customer Tax

[global]

After Discount

☒ Use system value

Default Tax (%)

[global]

0

Default tax for purchase order item

☒ Use system value

- **Default Shipping Cost:** If you enter an shipping amount here, all purchase orders will automatically use this shipping cost as default. If you want to set different shipping cost for different purchase orders, leave this field blank
- **Apply Customer Tax:** Set customer tax applied before or after discount
- **Default Tax (%):** Enter default tax for purchase order items

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