

# AdvancedPO add-on

## Introduction

Advanced PO add-on introduces new sales entity Purchase Order(PO). In bare UDropship, Magento shipment records serves as PO. Advanced PO add-on extends dropship with support of virtual/downloadable products with a lot more flexibility in managing POs and shipments.

## Automatic generation of POs

To configure automatic creation of Purchase Orders, select order statuses for which the system will generate POs **Configuration > Drop Shipping > Vendor Options > Make Available to Dropship on Order Status(es)**

Almost all automatic functionality in the UMarketplace Extension triggers by the status change of either order, PO or shipment. Automatic PO creation stick to that model too.

## Important requirements for automatic POs creation

First requirement is selecting proper order status on which to trigger POs creation in **Configuration > Drop Shipping > Vendor Options > Make Available to Dropship on Order Status(es)**

Second one, orders need to be placed using one of the carriers, either dropship or split-rate.

Missing above requirements will lead to the situation where POs will not being created automatically.

If dropship carrier is disabled all together, POs will not be created at all, even manually.

## Notifications and automatic shipments creation

To create shipments automatically, configurations needs to be set to send new PO vendor notification emails with packing slip or shipping labels attachments. For email notifications once order split to PO:

**vendor preference > Integration > New Order Notification Method = \* Email notification**

Both pairs need to be set to yes:

- for packing slip to be attached to vendor notification (with AdvancedPo add-on it also automatically creates customer shipment)

**vendor preference > Integration > Attach Packing Slip to Notifications**

**Configuration > Drop Shipping > Vendor Options > Attach Packing Slip to Vendor Notification**

- to attach shipping label (with AdvancedPo add-on it also automatically creates customer shipment)

**vendor preference > Integration > Attach Shipping Label to Vendor Notification**

**Configuration > Drop Shipping > Vendor Options > Attach Shipping Label to Vendor**

### **Notification**

and additionally carrier need to support label printing (UPS, USPS, FedEx)

**vendor preference > Shipping Labels > Label Type** - need to be non empty (PDF or EPL) and valid carrier credentials filled in proper section of vendor preference

- similar for vendor PO PDF (Advanced PO add-on)

**vendor preference > Integration > Attach PO Pdf to Notifications Configuration > Drop Shipping > Purchase Order Options > Attach PO Pdf to Vendor Notification**

## **Create POs manually**

One of the two key features of the Advanced PO add-on is an ability to create partial POs and shipments. Another key feature is an option to create PO's by clicking on the button in the right top corner **Create PO** in the Admin section of the order view page.

Create PO page looks similar to Magento native pages where Invoices and Creditmemos are created. Item qty selected on this page for which PO's are created. In case Multivendor add-on is used, target vendor can also be selected.

### **Reassign existing POs**

Advanced PO add-on in combination with Multivendor add-on possess quite useful feature, reassigning existing PO to another vendor. The PO status needs to be changed to canceled in **Purchase Order History** box in PO view page.

If shipments were already created in that PO, either **Full Cancel** or **Nonshipped Cancel** checkbox needs to be checked. **Full Cancel** checkbox will change PO shipments status to canceled, even if shipments have **Shipped** or **Delivered** status.

**Nonshipped Cancel** checkbox will cancel only non-shipped non-delivered shipments.

Once existing PO canceled, order items status also updated by changing qty POed field and those order items are ready to be included in new POs. Click on **Create PO** button on order view page, to select new vendor and order items qty click submit and new POs generated.

## **Create shipments and shipping labels**

POs have to be generated and shipment records created in order to fully process the order. Vendor can accomplish this in vendor portal dashboard order view box using **Create shipment** box.

The great flexibility here is ability to create partial shipments using **Partial Availability** selectbox, where vendor need to select **Ship Partial** and set required qty.

In addition, vendor can generate shipping labels by checking **Generate Label** checkbox. These 2 features work in sync.

Making partial shipment will sync weight/value parameters of **Generated Label** form.

Very important to note that labels can be generated only using FedEx, UPS, USPS system shipping methods.

In case vendor shipping methods configured using other carrier methods for actual shipments, vendor will not be able to generate label.

Select carriers, which vendor uses to generate labels for, in **Configuration > Drop Shipping >**

**Vendor Options > Always allow generate labels for these system carriers.** In Vendor Portal Generate Label *Shipping Method* parameter selectbox will be populated with selected carriers methods. In order to use that carrier for label, just select require method.

If vendor forgot to generate label, when shipment created or want to generate extra label, there is an option to generate label from shipment view box. After vendor created a shipment it will be included in the list of POs shipment which located under Order Items table. Shipment IDs have a link that lead to PO shipment view box, where vendor can change shipment status and generate labels.

## PO status depend on shipment status

By default PO's strictly statuses are Shipped, Delivered, Canceled.

Vendor cannot change PO status to shipped unless shipments created for all items and all shipments statuses have shipped status.

The same process applies to Delivered PO status. To fully cancel PO, shipments have to be canceled as well (there will be a checkbox Full Cancel when PO status changed to Canceled).

If the workflow is different and PO have to be changed to any status, set Yes in

**Configuration > Drop Shipping > Vendor Options > Allowed forced PO status change**

## Shipments auto-invoice

Another Advanced PO add-on's feature is shipments auto-invoicing.

Shipments can be invoiced once the status reaches the one that is set in

**Configuration > Drop Shipping > Purchase Order Options > Auto-Invoice on these shipment statuses**

to turn on the feature

**Configuration > Drop Shipping > Purchase Order Options > Autoinvoice shipment = Yes**

this will work, if payment method used by customer to order, implement partial capture (there are very few of them: PayPal website payments Pro, enterprise edition payment bridge).

Another option, is to bypass payment method's limitation of "partial capture" in

**Configuration > Drop Shipping > Purchase Order Options > Autoinvoice shipment = Trigger whole order invoice**

this option will invoice(capture) the whole order.

Later option will be a better fit, if there no orders that need to be only invoiced partially e.g order split between 2 vendors, hence we have 2 POs in order and both POs need to be invoiced, but order payment method does not support ability to capture them separately.

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