# Documentation

Pickware®

# **Shopware WMS powered by Pickware**

Shopware ERP - powered by Pickware®

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# Contents

```
Prolog
<u>Installation</u>
   Requirements
   <u>Installation</u>
       Purchase the plugin in the Shopware Community Store
       Install the plugin
      Install the Shopware WMS powered by Pickware Apps from the App store
   Setup
       Plugin settings
       Printer setup
       Create Printer setupa Shopware User
       Email templates
       Setup iPods / Barcode scanner
          Connect Barcode scanner
          Profile setup
          Recommended iOS settings
Initialization of important data
       Adjust the status of old orders
       Stock Initialization
       Storage location management
       Maintain EAN/ cre
       ate own Barcodes
       Perform a first inventory
Manual
   Shipping
       Batch picking
       Partial deliveries
```

Pickup by the customer

Storage

Store suppliers deliveries

Create item

Storage location management

Managing return shipments

# Other

Other recommended modules

Recommendations for the purchase of a printer

Known problems and solutions

Login to Apps after correct setup not possible

Sudden problems with printing

The printer does not receive any print jobs from Google Cloud Print

Selection of compartments/ paper in Google Cloud Print not possible

Connect the Apps while the Shop is in maintenance mode

<u>Premium items and other special items in the Picking App</u>

Missing barcode on invoice/ dispatch note

Shopware WMS powered by Pickware Documentation - Page 3

# **Prolog**

Thank you for your interest in Pickware. This document provides you the main information on the installation and operation of Shopware WMS powered by Pickware.

For us, a simple and intuitive handling is extremely high on our list of priorities. Therefore most of the processes are self explanatory or further instructions are given during the use. For some particularly important aspects we offer additional information in this documentation.

Please note that we develop our software continuously. For that reason this documentation always refers to only a certain stage of development. We are making a lot of effort to keep the content of this documentation up-to-date. But we hope that you can understand that our resources are limited and the development and support of Pickware are for us higher in priority.

If you have any questions, that are not answered in this documentation, do not hesitate to contact us by phone or email.

Your Pickware Team

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# Installation

# Requirements

The Plugin Shopware ERP powered by Pickware has to be installed separately to use Shopware WMS powered by Pickware. All further information on how to install the Shopware ERP powered by Pickware can be found <a href="here">here</a>.

# Installation

Purchase the plugin in the Shopware Community Store

In order to purchase our Shopware WMS powered by Pickware Plugin, open the following link to the Shopware Community Store:

http://store.shopware.com/en/viisonpickwaremobile 1/pickware-mobile.html

Click "Add to shopping cart" and confirm your order.

# Install the plugin

Afterwards open the plugin manager in your Shopware Backend. You will find "Shopware WMS powered by Pickware" under "My purchases". Use the install button to install Shopware WMS powered by Pickware in your shop.

Please pay attention to the instructions for the readjustment of the *Email templates*.

Install the Shopware WMS powered by Pickware Apps from the App store

To install the Shopware WMS powered by Pickware Apps, open the App Store on the iPod Touch/ iPhone which you want to use for Shopware WMS powered by Pickware. Please note that the device needs to be connected to the internet. Search for "Pickware" and install the "Picking App" and "Inventory App".

# Setup

### **Plugin settings**

All available settings of Shopware WMS powered by Pickware can be found in the Shopware Backend under *Configuration > Basic settings > Additional settings > Shopware* 

WMS powered by Pickware. You can find an explanation of each field by clicking on the blue question mark on the right side.

# **Printer setup**

For printing invoices and shipping labels with Shopware WMS powered by Pickware during the picking process, you have to connect your printer with Google Cloud Print. This service enables the communication between your mobile device and printer. Therefore a Google-Account is required. Click <a href="here">here</a> for further information on how to install and use Google Cloud Print.

You can find a list of printers which are already "Google Cloud Print ready" <a href="here">here</a>. We recommend to use one of these printers. Nevertheless, you can also use any other conventional printer. Therefore follow the instructions under "add a classic printer". Please note that for the use of one of these printers with Google Cloud Print a computer with installed Google Chrome has to be powered on.

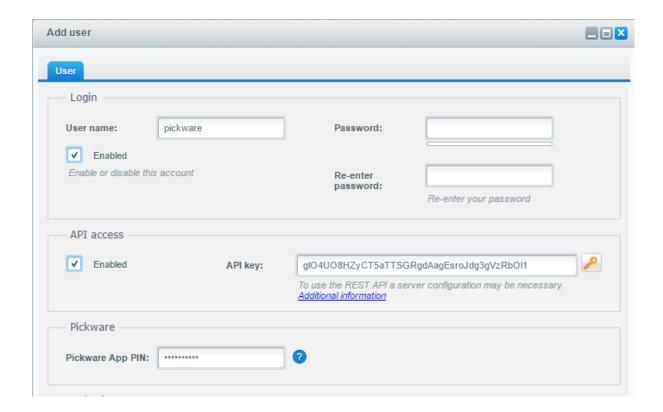
Another alternative to use a classic printer is based on a special print server such as <u>Lantronix xPrintServer - Cloud Print Edition</u>. This enables you to use Google Cloud Print with your conventional printer without the usage of a local computer. You only have to connect this print server with your network and your printer.

To make sure that the installation of Google Cloud Print was successful run a test print over the <u>Google Cloud Print surface</u>. As a last step you have to select the printer in the <u>profile setup</u> in the "Picking App".

<u>Please note:</u> For generating and printing the shipping labels automatically from the Picking App you have to install one of our shipping adapters.

# **Create a Shopware User**

For each employee working with Shopware WMS powered by Pickware, a user in the Shopware user administration has to be created. We recommend to set up one personal user for each employee. To enable the login for these users in Shopware WMS powered by Pickware, the API access must be activated for this user and a Pickware App PIN has to be set. Mark the checkbox for the API access and enter an at least four-digit PIN into the corresponding field.



Please also make sure that the user's role has the necessary rights. To manage role permissions go to *Configuration > User administration* and open the dialogue *Edit rules & permissions*. Select the desired role and enable at least the following privileges:

- order
  - read
  - update
- article
- media manager
  - o read
  - o create
  - upload
  - o Delete
- variant
  - o read
  - update

Finally, click on Assign the selected privileges to the selected role to save the changes.

# **Email templates**

With the installation of Shopware WMS powered by Pickware the status email templates for the status *Partially delivered* (ID 6) and *Completely delivered* (ID 7) will be

adjusted. These adjustments are necessary to guarantee the full functionality of partial deliveries and shipment tracking in Shopware WMS powered by Pickware.

If you have already customized the email templates for these status, your templates will be stored with the addition\_old when installing Shopware WMS powered by Pickware. After finalizing the installation you can simply insert your own adjustments from the old templates to the new email templates of pickware.

# Setup iPods / Barcode scanner

# Connect Barcode scanner

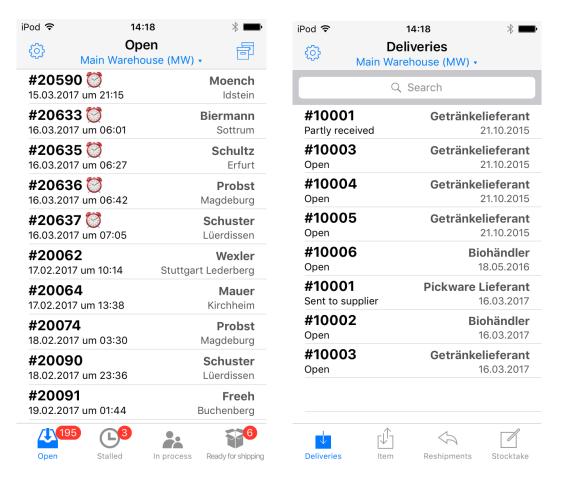
To connect the barcode scanner with your iPod/iPhone, you simply have to open the barcode scanner-cover on the top, put your iPod/iPhone in and close the cover again. There are no extra steps required.

# Profile setup

To connect one of the apps with your shop, open the profile selection in the home screen of the app, then press the + in the upper right corner. The setup wizard will guide you through the different steps.

Once you have created the profile in the Picking App, the same profile is automatically available in the Inventory App as well.

Starting from Version 1.1 of the Shopware WMS powered by Pickware Plugin, Version 3.4 of the Picking App an Version 2.9 of the Inventory App, it is possible to choose between different warehouses in the App. This enables the selection of a certain warehouse for the respective profile. The warehouse has to be chosen correctly for each shop. Once you selected a specific warehouse, it is set as a default as long as it is not changed manually via the dropdown section.



Any additional information for the usage of multiple warehouses can be found in the <a href="Shopware ERP">Shopware ERP</a> powered by <a href="Pickware documentation">Pickware documentation</a>.

### Recommended iOS settings

For an optimal handling of the barcode scanners, we recommend the following general settings of the iPod/iPhone: Do not use a PIN to unlock the screen, set the Auto-Lock to 5 minutes and place the Pickware Apps in the shortcut bar at the bottom of the display. By limiting the display brightness you can also achieve a longer battery life of the devices. Besides, the format settings for your country should be selected under *Settings* > *General* > *Language & Region*.

You should always install the latest iOS version to benefit from all bug fixes and optimizations from Apple. Additionally, deactivate in your iOS Settings "iTunes & App Stores" all automatic downloads for app updates since new app versions occasionally require a new version of the Shopware WMS powered by Pickware Plugin. Please note, that the apps and plugins have to be updated simultaneously. In general, we recommend to install all new updates promptly.

# Initialization of important data

Before you start with the productive use of Shopware WMS powered by Pickware, it is necessary to maintain important data in your shop. A recommendation on how to proceed is given in the following sections.

# Adjust the status of old orders

Shopware WMS powered by Pickware decides based on the order and/or payment status if one order is relevant for shipping. Orders which have been shipped already, require the order status "completely delivered " so that Pickware recognizes them as already shipped orders. Please note, that the status "Completed" is not sufficient.

# **Stock Initialization**

After installing the Shopware WMS powered by Pickware Plugins you receive a message about not initialized items in the Shopware backend. Click on "*Edit now*" to initialize the stock. This step is a prerequisite for inventory control with Pickware. Please read the information text in the stock initialization dialog carefully and follow the required steps.

# **Storage location management**

In order to display the storage locations of all items in the Shopware WMS powered by Pickware, the respective field has to be maintained in the basic info of the article.

Besides defining the storage location in the backend, it is possible to create and change the storage location via the inventory app. In doing so, select the tab *article* and search for the specific article. Click on *"Relocate"* and search for the new storage location which was previously generated in the backend. If the storage was not generated before, you can also click on the + in the top right corner and add a new storage location.

# Maintain EAN/ create own Barcodes

A prerequisite to use the barcode scanner with Shopware WMS powered by Pickware, the EAN field of your Shopware items has to be filled correctly. You can either maintain the field directly in your Shopware backend in the basic infos of the items or by using the barcode scanner when using Shopware WMS powered by Pickware. Therefore, search in the *item* tab of the Inventory App for the respective article and click on *edit*. Here you can set various item information, especially the EAN field. Simply scan the product's barcode to assign the respective EAN to the item and click *save* to confirm.

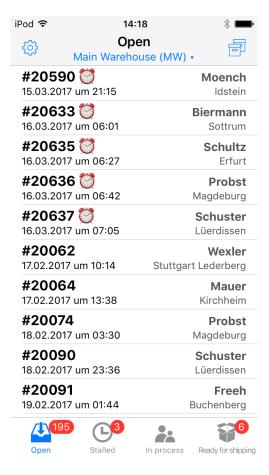
If you have products without any barcode, you can create and print your own in the Shopware backend under *Items > Barcode label printing*. These barcodes are generated from the item number. You can reserve items for label printing directly in the item overview. Go to *Items > Overview*, check the box for all desired items and click *pre-select chosen for label printing*.

# Perform a first inventory For a correct initialisation of the stocks, we recommend to carry out an stocktake of all the products. For this you can use the stocktake mode in the Inventory App. The stocktake can be carried out for each warehouse individually. Finally, the inventory entries can be found in the "Stock-take export" in your Shopware backend.

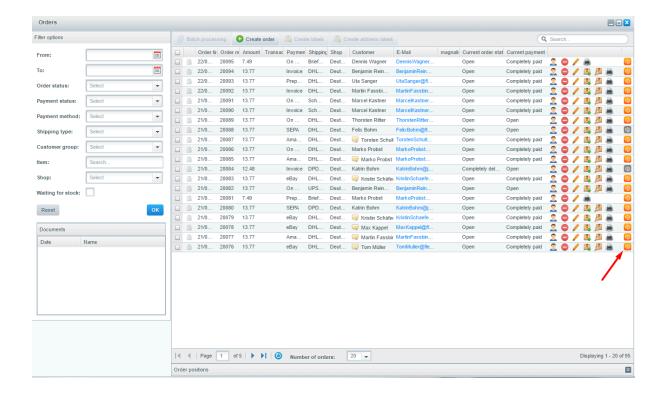
# Manual

# **Shipping**

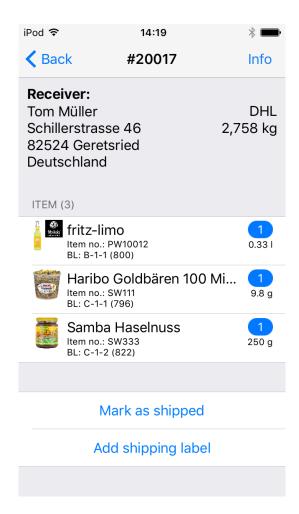
Open the Shopware WMS powered by Pickware Picking App and sign in after <u>setting up</u> <u>the profile</u>. You will see a list of orders from your shop in the next step.



In the tab "Open" you can see all the orders which have to be shipped. This list corresponds to the orders list in your Shopware backend but only displays the orders that are relevant for shipping. This selection depends on the plugin settings in the Shopware backend and is based on the order/ payment status, the shipping / payment method and the stock of the ordered items. The orange/ gray icon in the Shopware backend order overview shows you whether an order is displayed in the Picking App or not. If you move your mouse over the icon, an explanation why an order is not displayed in the Picking App is shown.



To pick an order, simply tap on an order in the app. You will now see all order items sorted by storage place. Scan the positions successively with the barcode scanner. After you have scanned all positions, the invoice and/or delivery note will be printed automatically. Afterwards the order will be displayed in the tab "ready for shipping".



After scanning the barcode on the invoice/delivery note you will be redirected to the window to create the shipping label with one of our shipping adapters. After clicking on "Create shipping label" the shipping label is printed. With a final scan of the barcode on the shipping label, the customer receives automatically a shipping confirmation email incl. tracking link and the physical stock of the articles and the order status is updated. You can find a video of this process at <a href="https://www.pickware.de/videos">www.pickware.de/videos</a>.

# **Batch picking**

To pick multiple orders in the Picking App simultaneously, barcodes for the batch picking boxes are required first. The dialog box for creating these barcodes can be found in the Shopware backend under *Items > Barcode label printing > batch picking*.

To start the batch picking mode, scan one of the batch picking boxes' barcode or click on the icon at the upper right in the "Open" tab in the Picking App. Now scan every box that you want to use for picking. In the next step, as many orders as scanned boxes are loaded automatically. All positions of these orders are summarized and sorted by storage location. Now scan the items as usual and follow the instructions on the screen.

In order to create invoices and/or delivery notes and shipping labels for picking boxes that are ready to ship, scan the appropriate box in the "Ready for shipping" tab. This

takes you to the known screen to create the documents. To mark an order as shipped, scan the shipping label as usual.

Single orders can be deferred during the batch picking, if certain items are not in stock. As soon as you started the picking process and select the "title" (e.g. 'Box 1 (#20000)') of the partially picked order, a selection of different option will open. Here you can select the option "deferred". Hence, the respective order is deferred and the batch picking process can be continued with the remaining orders.

### **Partial deliveries**

For partial deliveries you simply have to tap"partial shipment" after scanning the items that should be part of the partial delivery during the picking process. All other steps are similar to the normal shipping process. After confirming the shipment with the final scan of the shipping label, the order with the remaining positions is displayed in the tab "Stalled". From here, you can pick the rest of the order at a later time.

# Pickup by the customer

To offer pick up as a delivery service, you must create that shipping type in your Shopware backend under *Configuration > Shipping costs* and activate it. Afterwards select that shipping type in *Configuration > Basic settings > Additional Settings > Shopware WMS powered by Pickware* in the field *Versand-fremde Versandarten*.

If the delivery service "Pickup" has been selected by a customer, the goods can be picked with Shopware WMS powered by Pickware as usual. The difference is that there is no shipping label created at the end of the process. The ordered items can be stored together with the invoice until the customer picks them up.

The process is automatically marked as completed when the customer picks up the goods and the invoice is being scanned.

# **Storage**

# sStore suppliers deliveries

Use the tab "Shipments" in the Inventory App to store suppliers deliveries. Similar to the picking process you confirm each item of a vendor order by scanning it and store it afterwards. The only prerequisite is that the order has been created with Pickware in the Shopware backend. Instructions on how to create a supplier's order with Pickware can be found <a href="https://example.com/here">here</a>.

Important: Only orders for the selected warehouse are displayed.

**Note**: Open quantities of suppliers orders with the status "Completely received" or "Cancelled / Written off" will not be considered as stock in admission anymore.

### **Create item**

To create a new item in your shop using Shopware WMS powered by Pickware, simply tap the + in the upper right corner in the "Item" tab of the Inventory App. Here you can fill the EAN field with a scan of the barcode on the product and maintain some other basic information. All other product information such as descriptions and images have to be maintained in the Shopware backend as usual.

# **Storage location management**

For managing the storage location, the corresponding field "Storage location" in the item's basic info has to be filled. You can fill this field directly in the Shopware backend or simply open the "Item" tab in the Inventory App. Scan the barcode of the item, or search for the product name or manufacturer number to display the item. By clicking in the storage location field you can enter a storage location or scan a barcode representing that storage location. More information can be found in the section for the label printing.

# Managing return shipments

The handling of return shipments is performed in the following four steps:

- 1. Select the "*Reshipments*" tab in the Inventory App and search for the order or customer's name and open the respective order. Alternatively, the barcode of the return label can be scanned to be directed to the right order<sup>1</sup>.
- 2. Scan the corresponding products of this order or select the items manually using the plus symbol.
- 3. Select the warehouse in which the returned goods should be stored.
- 4. Deposit the corresponding return amount for each item. If it is not possible to resale the returned items, they can also be written off.
- 5. Add an optional comment and save the return.

After saving, you will see an overview in which the returned items are listed with the returned amount and their respective storage location to restore them easily.

The order will be set to the status "Reshipment received" in the Shopware Backend and all stock entries will be amended respectively. In case of storing the goods again, the physical as well as the available stock increases. Otherwise (written off) the stock will not be increased.

The cancellation invoice can be created in the Shopware backend. To do this, go to the tab *Reshipments* in the respective order. There, all returned positions are listed and can be selected to create a cancellation invoice.

<sup>&</sup>lt;sup>1</sup> This requires that the return label has been created with one of our shipping adapters in the Shopware Backend.

As soon as you've processed the return, you simply change the order status of the orde to "Reshipment completed".

# Other

### Other recommended modules

Besides Shopware ERP powered by Pickware and Shopware WMS powered by Pickware, we offer additional modules for optimizing the daily work with your Shopware Shop.

In addition to the Shipping adapters for creating shipping labels during the order picking automatically, we have, we have various modules for accounting, drop shipping and parts lists.

An Overview can be found at <a href="https://www.pickware.de/module">www.pickware.de/module</a>.

With Pickware POS we have the perfect solution for online traders, who want to connect their offline retail store with their online shop. For further information go to <a href="https://www.pickware.de/pickware-pos">www.pickware.de/pickware-pos</a>.

# Recommendations for the purchase of a printer

For an optimal use of Shopware WMS powered by Pickware in your warehouse, we recommend to use a laser printer which is Google Cloud Print ready. The printer should have two separate compartments - one for DIN A4 size paper for delivery notes and invoices and one for DIN A5/A6 for shipping labels.

It is also possible to use a label printer (eg. Zebra or Dymo) for printing shipping labels with Google Cloud Print. However, a laser printer for printing DIN A4 documents is still needed.

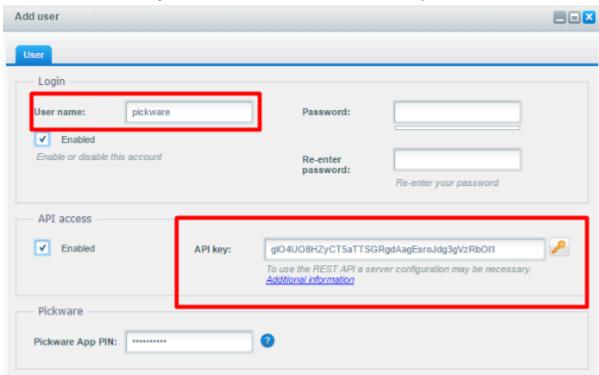
Barcodes for products and storage locations can be printed in specific formats in the Shopware backend.

# **Known problems and solutions**

# Login to Apps after correct setup not possible

If you receive the error message "Login Failed - The entered credentials are not correct" even though the <u>user was created correctly</u> and the login data have also been correct, the Shopware REST API may not work in your shop. You can test this by trying to log in at "www.my-shop.com/api/versions" with the user name and the associated REST API Key. If this does not work, you know that the REST API does not work in your shop.

You can find the API Key in the User administration in the Shopware backend:



# Sudden problems with printing

If some invoices are not printed anymore and no error message appears in the Picking App, check the following steps.

- 1. interruption or unreliability of the internet connection
- 2. printer and / or computer with Google Chrome is switched off or has not been logged in
- 3. status of print jobs in the app under *gear* (top left) -> *check print jobs*, here the print jobs can be restarted
- 4. check in the Google Cloud print web interface:
  - a. If the printer is online and ready?
  - b. What is the status of the print jobs in the queue? If necessary, remove hanging print jobs, so that they cannot block the others
- 5. check the print queue on the computer, the print server or printer and clear it if necessary
- 6. restart the printer and possibly the computer with Google Chrome
- 7. Login to Google Cloud Print again, for example after changing the password

Further information at: Google Cloud print Help - document does not print

# The printer does not receive any print jobs from Google Cloud Print

If all print jobs arrive in Google Cloud print, but not at the printer, this could be due to the configuration of your network: port 5222 has to be open to the outside, and Google Cloud Print and XMPP has to be allowed in the firewall.

# Further information at: Google Cloud Print - Fix offline printer issues

# Selection of compartments/ paper in Google Cloud Print not possible

If a printer is connected to Google Cloud Print via Google Chrome, possibly not all print settings are exported from the printer. In this case you can duplicate the printer on the computer and create a printer for each paper size / compartment, which can then be configured in the printer settings. You can assign these two printers to the corresponding paper size in the profile setup of the apps.

# Connect the Apps while the Shop is in maintenance mode

If your shop is in maintenance mode, a login with the apps is possible. If the server is password protected (HTTP Auth) during the test mode, the following URL must be excluded from it:

• / api / ...

These are either already from Shopware itself only with a login available or not individually usable, if the protection for the rest of the shop remains.

### Premium items and other special items in the Picking App

For displaying premium items and other special items in the Picking App correctly, the corresponding item has to be linked with a correct item number. Pickware works with these item numbers. Therefore, Item numbers with appendages such as "FREE" are not recognized in the Picking App.

# Missing barcode on invoice/ dispatch note

To accelerate the picking of an order, a barcode is printed on the invoice/ dispatch note. The barcode is shown below the top right block, which usually contains the customer's' address, date and so on.

If the barcode is not displayed on the document, check if the used HTML element in the ID *head\_right* is contained in the respective invoice template *index.tpl*. If not, add such an element in the invoice template.