Purchase Orders 6.0

With Attachments and P.O. Management

For Zen Cart 1.3.9 or 1.3.8

User Manual

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Use at your own risk.

Credits

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Changelog

V6.0 CHANGELOG
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1) Now compatible with Zen Cart 1.3.9.
2) Now compatible with PHP4 and PHP5.
3) Increased security measures.
4) Customizable PDF Attachment (Previously PDF Packing List Only) Including:
     a) All Text
     b) Add Pictures Option (ex: company logo)
     c) Columns on Product List → Adjust Sizes and Content
     d) Change upper and lower comments.
     e) Add all products option → Great for sales receipts and invoices!
     f) Option to include total information → Great for sales receipts and invoices!
     g) Fill whole PO when not using upper comments.
5) PDF Attachments (Formerly Packing List) Can Fill Multiple Pages Correctly.
6) Option to assign default subcontractors by manufacturer instead of product.
7) Purchase Order Management System
     a) Enter expected shipment dates before an item ships. Great for tracking orders which are out of stock or take awhile to ship.
     b) Custom messages → Allow other messages for tracking orders. Ex: Out of Stock/Canceled
     c) Customizable checking status emails that can be sent to suppliers on demand. This makes it easy to check the status of an order.
8) Added ability to adjust the number of POs, orders, and subcontractors on PO Send Page, PO Enter Tracking Page, and PO Assign Subcontractor pages.
9) Added ability to ignore orders with a certain status. For example, Canceled orders can be ignored.
10) Option not to email customer from enter tracking page.
11) Option to mark as shipped without a tracking number. Just put a checkbox next to the shipping method and leave the tracking info blank. No need to fill in the checkbox if there is a tracking number, although it doesn't hurt either!
12) Ability to preview PDF Packing Lists on review PO page.
13) Fixed problems with division by zero.
14) Fixed formatting of final_price on POs.
15) Fixed problem with POs grouping incorrectly in some instances when tracking was entered for part of a PO.

V5.0 CHANGELOG
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1) Added the ability to change text from any email or text file attachment. This can be done for individual subcontractors or for all subcontractors. You can also specify whether to do this for both the email body+subject and the text file attachment or just one of them.

2) Added optional custom email titles for different subcontractors.

3) Added optional custom packing list attachment filename and text file attachment filename for different subcontractors.

4) Added custom mime types for text file attachments. Can be done for all subcontractors or for individual subcontractors.

5) All tags, except for product specific tags, will work in any section of the email or text file attachment now, including the product section. Note: Email title tags are still limited. See manual for more info.

6) Added {shipping_method} tag to limited email title tags.

7) Added several new tags which give you the ability to break the addresses down into smaller sections like state name, state abbreviation, zip code, street address, etc...

8) Fixed problem with custom text file names not working.

9) Now compatible with PHP4 because it uses html_entity_decode instead of htmlspecialchars_decode.

10) Various code improvements and tweaks.

V4.5 CHANGELOG
****

1) Added the ability to automatically send orders, either through a cron job or from the checkout success webpage.
2) Added a link to the send orders and resend orders page that will check all the orders on the page.
3) Fixed problem with adding products to a purchase order for an unknown customer when the product is located in the top category.

V4.0 CHANGELOG
****

1) The enter tracking information page now uses GreyBox to place a nifty javascript pop-up in your browser when entering tracking information. Then, once you enter this info, the original window is refreshed. This reduces the steps that were required to enter tracking info, eliminates the pop-up, and immediately updates the enter tracking page by removing the order you entered tracking info for from the page.
2) Added optional text file attachments that can be customized just like the emails by editing a new text file template. These can be reviewed and edited for each PO from the review PO before sending page, just like the email. This will allow users to design tons of different attachments at will for their subcontractors, include tab-delimited files, custom text packing lists, and even rich-text format files that will open in word processors.
3) Added tags for both the email and the text file attachment that allow the user to add or remove sections from their purchase order for different subcontractors. This allows you to customize emails and text file attachments for different subcontractors.
4) Added tags for both the email and the text file attachment that allow the user to add or remove sections from their purchase order when sending a purchase order for an unknown customer.
5) Removed admin configuration for removing three sections from the purchase order when sending for an unknown customer. This was a redundant feature, as the change above allows the user to do this and more.
6) Changed tag replacement behavior so that all tags in the header now work in the footer and vice-a-versa. This allows a lot more flexibility in how you design your email or text file attachment. For example, in the last version, you couldn't put the shipping address after the products because the shipping address was restricted to the header alone. In this version, this is no longer an issue.
7) Added the ability to change the way the order status is updated as orders work their way from new, to po sent, to shipped. Also added the ability to prevent any changes in order status.
8) Added the ability to specify subcontractors that should have packing lists attached, and/or text files attached to their purchase orders. Users can still use the old options for always sending these, never sending these, or having a checkbox for each PO sent to determine if these should be sent if they prefer.
9) Now compatible with Google Checkout in the following ways: a) PO tracking link will be replaced with a message that this feature is not available for Google Checkout orders and instructing the subcontractor to email tracking info.   b) The admin enter tracking for PO page now links the user to the edit orders page, where you can change the order status to Google Processing, and then enter the tracking information to complete the order with Google Checkout. Google Shipped orders will be treated as shipped orders. c) On the enter tracking info for POs page, a "GC" is placed before Google Checkout orders to alert the user that these orders are from Google Checkout, and hence they will link to a different page for entering tracking info. d) Not a new feature, but still important for Google Checkout – POs sent that were Google Checkout orders will not change the order status from Google New.

10) With the old version, it was difficult to tell which items were from a single order on the send PO page. This version alternates text colors (black, blue, black, blue, etc...) for each order to make it easier to distinguish between different orders while still preserving the background color alternation that makes it easy to distinguish between different products ordered.

11) Reviewing a PO no longer automatically updates the database before you send the PO. So, you can abort the process up until you click the final send button, and nothing will be affected.

12) When you try to review more than one PO at a time, you will now get an error message instead of an undesired behavior.

13) Refreshing the page or using the back button will no longer resend the PO on the send PO page, resend PO page, and review before sending PO page. This was not implemented for the send PO for unknown customer, as it would have required an additional database entry that would serve no other purpose, and this just didn't seem worth it. So, you still need to be careful on the send PO for unknown customer page. This is an important new feature, because it greatly reduces the likelihood of accidentally sending a PO twice.

14) Meta information is included for attachments.

15) Added the ability to change the way orders are listed on the send PO page and the resend PO page – either oldest orders first or newest orders first.

16) Added message stack to confirm that POs have been sent.

17) Added the ability to enter a custom customer comment on the packing list. This is useful when a customer has a comment that is partially for you and partially for the recipient of the package; you can enter a customer comment manually that only includes the part that should be on the packing list.

18) Reconfigured resend PO page. Now includes shipping address and quantity of item ordered.

19) When orders change from new to po sent status, your preferences dictate what, if anything, happens. If there is no po sent message to be included in the order notes, and no po sent status change is specified, nothing happens. If one of these is specified, it happens, but not the other. If both of them are specified, they both happen.

20) Fixed spelling of address on tags. This means that your old email templates may need to be adjusted to reflect the correct spelling on these tags.

21) Upgraded to newest version of fpdf for PDF creation.

22) Wrote a proper user manual.

23) Various code improvements and tweaks.

24) Whatever else I've forgotten about and changed! :)

V3.12 CHANGELOG
****
1) HTML emails fixed.
2) Added {customers_comments} field for email header.
3) Added a list of fields to readme file.

V3.11 CHANGELOG
****
This is a bug fix release. If you are using 3.0 or 3.1, I highly recommend you upgrade.
1) Fixed problem with incorrect attributes on send PO for unknown customer page.

V3.1 CHANGELOG
****
This is a bug fix release. If you are using 3.0, I highly recommend you upgrade.
1) Fixed problems with adding products on send PO for unknown customer page.
2) Fixed heading problems that caused issues with other headings in Zen Cart.
3) Renamed send PO for unknown customer page to be more consistent with mod.
4) Consolidated files to be more consistent.

V3.0 CHANGELOG
****
1) Created a way to send purchase orders to customers that are not in your database. This is great for phone orders, ebay orders, etc...
2) Added the ability to review a purchase order before sending it. This allows you to make changes that are specific to one subcontractor...or just simply change stuff on a P.O. any time before sending it.
3) Added several options to the database to give this mod more flexibility and decrease the effort needed to make this mod do what you want. Here are some notable additions to the database:
- Change a shipping option automatically. For example, you can make a shipping option read "Cheapest" on the P.O.
- Omit things from the P.O. when sent to a customer who is not on Zen Cart.
- Edit messages to customers when PO is sent and when packages ship.
- Edit messages that are placed on packing lists.
- Added the ability to choose whether or not packing lists are sent.
- Choose the packing list filename.
4) Got rid of database entry for Own Stock -- This was redundant. Just use the "Own Stock" subcontractor entry!
5) Moved English language stuff in admin directory to the appropriate language files. This still needs to be done for confirm_track_sub.php. Maybe someday!
6) Automatically retrieves store information for packing list, which makes installation easier -- one less thing to modify.
7) Added the ability to change the sort order of the confirm tracking page.
8) Changed layout of send PO page. Much more info is included for each order and this info is much easier to use and understand.
9) Added the ability to put shipping option in the email header section as well as the email footer section.
10) Added fpdf files -- It turns out there is no license on fpdf, which means it can be included. This makes installation easier!

V2.0 CHANGELOG
****
1) Implemented PDF packing lists that automatically attach to the email purchase orders. These have customer comments, and only include the products that ship with each purchase order. If the purchase order is a partial shipment, this is indicated on the PDF packing list.
2) Reworked confirm_track.php. This was badly broken. I fixed a lot of bugs and cut a lot of code. I also added who the purchase order was sent to. It seems to work fine now.
3) Added a ton of extra information to the send PO page.
4) Emails to customers now include all products shipped regardless of whether or not the shipment was a partial shipment or not. The old one only listed the products if it was a partial shipment
5) Simplified the PO # and Order # system. Now, PO #'s are what used to be Order #-PO #. So for example, if the PO # is 5 and the order # is 10 the new PO# would be 10-5. This way, there is only one number that your subcontractor needs to know, but you have all the information you might need in this number.
6) Changed the tracking input page so that all products are checked by default. The most common scenario is that all products shipped at once, so this is the easiest way to handle this. If not, you can still easily uncheck products.
7) Fixed many problems with the PO resend page. Basically, I just reused the code for PO sending with a few modifications. It seems to have fixed all the bugs.
8) Got rid of duplicate Own stock entry in drop-down menus.
9) Added search capability for Order Numbers in PO Resend page.
10) Fixed problems with incorrect shipping when sending multiple POs at once.
11) Fixed problems with 2nd line of address and company not showing up in addresses.
12) Added the ability to add comments to packing lists and POs.
13) Changed the default behavior so that orders are not listed on the Send PO or Resend PO page if they have been marked "Delivered" in Zen Cart.
14) Added the ability to reinsert "Delivered" products on the Resend PO pages with a checkbox.
15) Added the ability to remove customer comments from packing lists.
16) Changed the default behavior so that when an order is sent to subcontractor, the order is changed from "Pending" to "Processing." The customer IS NOT notified when this happens, but they can see this in their account if they log on. After the first part of the order is sent to a subcontractor, it will no longer do this for future POs.
17) Changed the wording and date format to reflect the changes made and the U.S. date system of MM-DD-YYYY. The exception was on the Resend PO page, where for logistical reasons, changing the date format would have been more difficult to do.
18) Added a warning about refreshing the page.
19) Changed default number of POs to show on one page to 100.
20) If you split an order in two between two suppliers/drop shippers only the first tracking information was sent to the customer. This has been fixed.
21) Change mailing addresses to reflect the format used in the United States.
22) Added a way for you to convert one type of shipping to "Cheapest" on the PO.
23) I've probably forgot something! But, this seems like everything I can remember doing. :)

V1.3B CHANGELOG
****
1) Incorporated updates and fixes made by Prattski to make this ZenCart v1.3.x compliant. TESTED ON 1.3.8.
2) General code maintenance, moved all necessary information to configuration variables
3) Updated list of available mail template tagnames both in subject and in contents of sent messages
4) Added debug mode for sending POs (admin/includes/extra_configures/purchaseorders DEBUGMODE set to Yes if needed)

New Installation

0) Before you do anything, BACKUP, BACKUP, BACKUP!!!! Make sure your database and files are backed up and safe. Don't skip this step or you may regret it.

1) Install Ty_Package_Tracker and configure it properly before you continue. The definition of carriers is the most important one, as our module will plug into it for consistency. If you are not interested in the tracking functionalities of this module, skip this step. Please note that the order management system will also require Ty_Package_Tracker. Ty_Package_Tracker can be found at http://www.zen-cart.com/index.php?main_page=product_contrib_info&products_id=167

2) Run dbscript.sql on your database via Admin->Tools->Install SQL patches (need to copy the entire file into clipboard and paste it into the screen).

3) If you are not interested in the tracking or order management functionalities, you need to remove links to that functionality so that your admin menu doesn't show them. In the contribution files, find /admin/includes/boxes/extra_boxes/send_po_customers_dhtml and add two slashes (//) in front of this line:

$za_contents[] = array('text' => BOX_CUSTOMERS_CONFIRM_TRACKING, 'link' => zen_href_link(FILENAME_CONFIRM_TRACKING, '', 'NONSSL'));

4) Copy the entire directory structure (email to email, admin to whatever is the name of your admin directory, posecuritycode.php and confirm_track_sub.php to your main store directory) to your store.

5) Edit posecuritycode.php in your main html directory. Enter a security code of your choosing and, if you have changed your admin directory name, change it here as well. This is important for added security!

6) Customize the email templates and text file attachments if you want. There are three text files in /email starting with email_ for the PO emails, three text files in /email starting with textattach_ for the text attachments, and one text file in /email named email_supplier.txt for sub-contractor inquiry emails. The header and footer files for the PO emails and text attachments contain all PO data except the product information. The products file contains product specific data which is repeated for each product in a purchase order. There is only one file for the sub-contractor inquiry emails. The tags enclosed in {} brackets are replaced with actual values when POs are being sent. You will find a complete list of tags you can use in the usage section of this manual. You can also customize each email for each subcontractor using addition and subtraction tags. Please see the usage section of this manual for more information.

If you are removing tracking functionality, make sure to remove the {tracking_link} tag so that the emails do not contain a link for your subcontractors to enter tracking information.

7) If you are NOT interested in automatically sending purchase orders, delete the following files from the root web directory: send_pos_cron.php and send_pos_checkout.php THIS IS VERY IMPORTANT! LEAVING THESE FILES UNMODIFIED IN YOUR ROOT DIRECTORY IS A SECURITY HAZARD!

If you decide to automatically send purchase orders, please follow this step very carefully. FAILURE TO FOLLOW THIS STEP MAY CAUSE A SECURITY HAZARD! There are two ways to automatically send purchase orders, by using a cron job that runs at a certain interval (i.e. purchase orders are sent every hour), or by sending purchase orders when the customer loads the checkout success page. Each option has its positives and negatives. They are further explained in the automatically sending purchase orders section of this manual.

To run a cron job that automatically sends purchase orders do the following:
a) Delete send_pos_checkout.php in your main web directory.
b) Edit send_pos_cron.php in your main web directory. At the beginning of the file you will see the text "yourcodehere". The line where you will find this text is also given at the beginning of the file. Change "yourcodehere" to a code that no one will be able to guess. If someone can guess this code, they will be able to send purchases orders, so make this code hard to guess!
c) Setup a cron job that runs send_pos_cron.php?code=yourcodehere in cpanel or whatever your web server uses for administrative tasks. Change yourcodehere to the code you setup in send_pos_cron.php. Each server will have a different command that will accomplish this task. You may need to contact your server to determine what command you should use to run this script from a cron job. I've had success using the following command with several web servers. If it doesn't work, contact your web server to see what they suggest. The command I use is:
wget 'http://www.yourwebsite.com/send_pos_cron.php?code=yourcodehere' > /dev/null 2>&1

To automatically send purchase orders when a customer completes a purchase and the checkout success page loads, do the following:
a) Delete send_pos_cron.php in your main web directory.
b) Copy everything from send_pos_checkout.php to the beginning of the following file: /includes/templates/YOUR_TEMPLATE/templates/tpl_checkout_success_default.php
Make sure you copy to the VERY BEGINNING of tpl_checkout_success_default.php!
c) Delete send_pos_checkout.php in your main web directory.

9) Configure some variables in Admin->Configuration->Purchase Orders.

10) Test. I would suggest adding a fake supplier with your email address in the respective field, submitting a test order to your store, sending out a PO to yourself, then entering the tracking either via admin or through the link provided in the email.

11) Backup. If you have customized your email or text file templates in any way, make sure to copy them to admin/email - updated distributions of this contribution will come with standard email and text file templates and you probably wouldn't want your customizations to get overwritten.

Update From Older Version

0) Before you do anything, BACKUP, BACKUP, BACKUP!!!! Make sure your database and files are backed up and safe. Don't skip this step or you may regret it.

1) Run a series of updates on your database via Admin->Tools->Install SQL patches (need to copy the entire file into clipboard and paste it into the screen). Install the updates in order, starting with the version above your version as follows. Make sure you install the upgrades one at a time and that you follow the exact order below:
      a) If you are updating from version 1 or 2, install upgradeto3, then upgradeto4, then upgradeto5, then upgradeto6.
      b) If you are updating from version 3, install upgradeto4, then upgradeto5, then upgradeto6.
      c) If you are updating from version 4, install upgradeto5, then upgradeto6.
      d) If you are updating from version 5, install upgradeto6.

2) If you are not interested in the tracking or order management functionalities, you need to remove links to that functionality so that your admin menu doesn't show them. In the contribution files, find /admin/includes/boxes/extra_boxes/send_po_customers_dhtml and add two slashes (//) in front of this line:

$za_contents[] = array('text' => BOX_CUSTOMERS_CONFIRM_TRACKING, 'link' => zen_href_link(FILENAME_CONFIRM_TRACKING, '', 'NONSSL'));

3) Copy the entire directory structure (email to email, admin to whatever is the name of your admin directory, and confirm_track_sub.php to your main store directoty) to your store. If you have relocated admin to another directory, make sure to check confirm_track_sub.php and change all instances of "admin" to your admin directory. (line numbers are given on the beginning of the file) Be careful! Backup your email directory files if they are customized!

4) Edit posecuritycode.php in your main html directory. Enter a security code of your choosing and, if you have changed your admin directory name, change it here as well. This is important for added security!

5) If you are NOT interested in automatically sending purchase orders, delete the following files from the root web directory: send_pos_cron.php and send_pos_checkout.php THIS IS VERY IMPORTANT! LEAVING THESE FILES UNMODIFIED IN YOUR ROOT DIRECTORY IS A SECURITY HAZARD!

If you decide to automatically send purchase orders, please follow this step very carefully. FAILURE TO FOLLOW THIS STEP MAY CAUSE A SECURITY HAZARD! There are two ways to automatically send purchase orders, by using a cron job that runs at a certain interval (i.e. purchase orders are sent every hour), or by sending purchase orders when the customer loads the checkout success page. Each option has its positives and negatives. They are further explained in the automatically sending purchase orders section of this manual.

To run a cron job that automatically sends purchase orders do the following:
a) Delete send_pos_checkout.php in your main web directory.
b) Edit send_pos_cron.php in your main web directory. At the beginning of the file you will see the text "yourcodehere". The line where you will find this text is also given at the beginning of the file. Change "yourcodehere" to a code that no one will be able to guess. If someone can guess this code, they will be able to send purchases orders, so make this code hard to guess!
c) Setup a cron job that runs send_pos_cron.php?code=yourcodehere in cpanel or whatever your web server uses for administrative tasks. Change yourcodehere to the code you setup in send_pos_cron.php. Each server will have a different command that will accomplish this task. You may need to contact your server to determine what command you should use to run this script from a cron job. I've had success using the following command with several web servers. If it doesn't work, contact your web server to see what they suggest. The command I use is:
wget 'http://www.yourwebsite.com/send_pos_cron.php?code=yourcodehere' > /dev/null 2>&1

To automatically send purchase orders when a customer completes a purchase and the checkout success page loads, do the following:
a) Delete send_pos_cron.php in your main web directory.
b) Copy everything from send_pos_checkout.php to the beginning of the following file:
/includes/templates/YOUR_TEMPLATE/templates/tpl_checkout_success_default.php
Make sure you copy to the VERY BEGINNING of tpl_checkout_success_default.php!
c) Delete send_pos_checkout.php in your main web directory.

6) Delete this file if it exists (it only exists for some of the version 3 releases, so don't worry if you can't find it): admin/includes/boxes/extra_boxes/send_pos_nc_customers_dhtml.php

7) Test. I would suggest adding a fake supplier with your email address in the respective field, submitting a test order to your store, sending out a PO to yourself, then entering the tracking either via admin or through the link provided in the email.

8) Backup. If you have customized your email or text file templates in any way, make sure to copy them to admin/email - updated distributions of this contribution will come with standard email and text file templates and you probably wouldn't want your customizations to get overwritten.

Using Purchase Orders

Set Up Subcontractors

In the admin section, go to Extra → PO Edit subcontractors. Here you will find a list of all the subcontractors that ship products for you.

Edit a Subcontractor
Click on the subcontractor. This will highlight the subcontractor and display their information. Edit this information and click on "save".

Add a Subcontractor
Change the subcontractor information to the new values. Then, click "insert".

Delete a Subcontractor
Click on a subcontractor. This will highlight the subcontractor and display their information. Click "delete" below their information.

Setup Your Own Company as a Subcontractor
You can easily setup your own company as a subcontractor if you send some orders to yourself. Just follow the same steps for setting up any other subcontractor.

ACTION ▶

ID:0 Full name:Own stock	
Short name	Own stock
Full name	Own stock
Street	123 Some Address St.
City	Some City
State	ST
Zip	11111
Email	shipping@testemail.com
Telephone	555-555-1212
Contact Person	Some Guy
Send PDF	yes
PDF Filename (Blank=Default)	
Send Text	no
Text Filename (Blank=Default)	
Text File Mime Type (Blank=Default)	

Make Changes to Subcontractor's POs

[insert] [save] [delete]

Options for Subcontractors

- Short Name – Name of subcontractor to display in areas with limited space
- Full Name – Full Name of subcontractor
- Street – Subcontractor's street address
- City – Subcontractor's city
- State – Subcontractor's state
- Zip – Subcontractor's zip code
- Email – Subcontractor's email address to send purchase orders to
- Telephone – Subcontractor's telephone number
- Contact Person – Contact person at subcontractor
- Send PDF – Option to send PDF attachment with a subcontractor's purchase orders. In Configuration → Purchase Orders, you must have the option for sending PDF packing lists set to 4 for this value to any effect. Otherwise, the default set in Configuration → Purchase Orders will supersede this setting. Set to "yes" to send PDF packing lists for a subcontractor. Set to "no" to not send PDF packing lists for a subcontractor.
- PDF Filename – Overrides default PDF filename for this subcontractor only. Leave blank for default.
- Send Text – Option to send text file attachment with a subcontractor's purchase orders. In Configuration → Purchase Orders, you must have the option for sending text file attachments set to 4 for this value to any effect. Otherwise, the default set in Configuration → Purchase Orders will supersede this setting. Set to "yes" to send PDF packing lists for a subcontractor. Set to "no" to not send PDF packing lists for a subcontractor.
- Text Filename – Overrides default text file attachment filename for this subcontractor only. Leave blank for default.
- Text File Mime Type – Overrides default text file attachment mime type for this subcontractor only. Leave blank for default.

Clicking "Make Changes to Subcontractor's POs" will take you to a page where you can make further customizations. You can also reach this page for all subcontractors from a link in the configuration options page.

The {+} and {-} tag system allows you to make changes to purchase orders, which makes purchase orders customizable for different subcontractors. However, it has its limitations. Since the information from tags is not known in advance, this data cannot be changed using the tag system. This screen makes these changes possible. In addition, for small changes, you can always opt to use the make changes screen instead of using {+} and {-} tags.

EDIT SUBCONTRACTORS -> MAKE CHANGES TO OWN STOCK'S POs

Replace Both Email and Text File		Replace in Email Only		Replace in Text File Only	
Find	Replace With	Find	Replace With	Find	Replace With
MODEL1	SUBC_MODEL_#1			UPS Ground	UPSG
MODEL2	SUBC_MODEL_#2			UPS 3-Day Select	UPS3
MODEL3	SUBC_MODEL_#3			UPS 2-Day Air	UPS2
				UPS Next Day Air	UPS1

Email Title - Leave Blank For Default

SHIP NOW - PO NUM {po_number}

save

Go Back to Edit Subcontractors

To add a change, place the text you want to find in a PO under under "Find". Then, put whatever text you want to replace it with under "Replace With". You can do this for both the email and text file, or for one or the other. Then, click the "save" button. When there is a conflict between the changes for both the email and the text file and the changes for one or the other, the changes for both take priority.

To delete an entry, simply change the values to nothing and click "save".

To change an entry, simply change the values and click "save".

You can also cut a value from a purchase order by entering the value under "Find" and leaving the value under "Replace With" blank.

The email title can also be customized for specific subcontractor's from this page. Simply enter the email title for the subcontractor and click "save". Leave this blank to use the default.

When accessed from the configuration page, the top of the screen will read "Make Changes to Everyone's POs". The email title section will also be missing, as this is configurable directly from the configuration page. This will make changes to all subcontractor's purchase orders. When there is a conflict between everyone's changes and a specific subcontractor's changes, everyone's changes take priority.

The uses for the make changes screen are varied. Here are a couple of examples:

EDIT SUBCONTRACTORS -> MAKE CHANGES TO OWN STOCK'S POs

| Replace Both Email and Text File | | Replace in Email Only | | Replace in Text File Only | |
Find	Replace With	Find	Replace With	Find	Replace With
MODEL1	SUBC_MODEL_#1			UPS Ground	UPSG
MODEL2	SUBC_MODEL_#2			UPS 3-Day Select	UPS3
MODEL3	SUBC_MODEL_#3			UPS 2-Day Air	UPS2
				UPS Next Day Air	UPS1

Email Title - Leave Blank For Default

SHIP NOW - PO NUM {po_number}

save

Go Back to Edit Subcontractors

Your subcontractor requires a tab-delimited text file with the shipping information in it. They use shipping codes. For example, "UPSG" stands for UPS Ground.

Your subcontractor uses different model numbers than you use on your site. They require you to use their model numbers or they won't accept your purchase orders.

Assign Default Subcontractors For Products

In the admin section, go to Extra → PO Assign to products. Here you will find a list of all the products in your store. You can assign default subcontractors for each product. Once you have done so, click on "save" at the bottom of the page. Make sure to save your work before going to the next page, or you will lose your changes.

Assigning a default subcontractor will make sending purchase orders easier. When you go to the send purchase orders page, your products will now automatically default to the subcontractor you choose. While this makes life easier, it is completely optional, and you can easily override the default setting on the send purchase orders page.

If you decide to automatically send purchase orders, this step is essential! The default subcontractor will always be used when automatically sending a purchase order.

Assign Default Subcontractors For Manufacturers

In the admin section, go to Extra → PO Assign to manufacturers. Here you will find a list of all the manufacturers in your store. You can assign default subcontractors for each manufacturer, just like you can products.. Once you have done so, click on "save" at the bottom of the page. Make sure to save your work before going to the next page, or you will lose your changes.

Assigning default manufacturers doesn't do anything by itself. Once you are satisfied, click the link "Assign Manufacturer's Default Subcontractor to Product's Default Subcontractor." This will assign all products to a default subcontractor based on which manufacturer they are made by. PLEASE MAKE SURE YOU CLICK THE SAVE BUTTON AT THE BOTTOM OF THE PAGE FIRST!

You can also have purchase orders do this for you automatically. Just change the setting in Configuration → Purchase Orders → PO only use manufacturers default subcontractor to 1. This will cause Purchase Orders to automatically assign all products their default manufacturer subcontractor before the send PO page is loaded or the automatic sending of POs is done. Doing so will cause Purchase Orders to ALWAYS use the default subcontractor for manufacturers and it will ignore and overwrite any changes you make to the default subcontractor for products. The advantage of this method is that new products will automatically be assigned a default subcontractor based on their manufacturer.

Please note, once you click the link on this page or setup Purchase Orders per the previous paragraph the assignment of default subcontractors for products CAN NOT BE UNDONE! So, be careful!

Configuration Setting for Purchase Orders

Several configurations settings are available in the admin section. To find them go to Configuration →
Purchase Orders. Here is a list of the configuration settings that you can change:

- **send pdf packing lists** → 0 - never, 1 - always, 2 - sometimes (default yes), 3 - sometimes
  (default no), 4 - use subcontractor default
  - o The difference between 2 and 3 is that when you go to the send purchase orders page, the
    check box for sending pdf packing lists will be checked if you choose 2. It will not be
    checked if you choose 3.
  - o Choosing 4 will cause the preferences you set up for your subcontractors to supersede this
    setting.
- **send text file attachments** → 0 - never, 1 - always, 2 - sometimes (default yes), 3 - sometimes
  (default no), 4 - use subcontractor default
  - o The difference between 2 and 3 is that when you go to the send purchase orders page, the
    check box for sending text file attachments will be checked if you choose 2. It will not be
    checked if you choose 3.
  - o Choosing 4 will cause the preferences you set up for your subcontractors to supersede this
    setting.
- **only use manufacturers default subcontractor** → 0 - no, 1 - yes
  - o Set this to 0 unless you ONLY want to use the manufacturer's default subcontractors.
  - o If you set this to 1, each time the send PO page is loaded or automatic POs are sent, the
    product's default subcontractors will be overwritten by your manufacturer's default
    subcontractor. This is convenient, because when you add new products, they will
    automatically be assigned a default subcontractor based on their manufacturer. However,
    you should ONLY use this option if ALL products from a manufacturer are fulfilled using
    the same subcontractor.
- **max display send po screen** → Enter the maximum number of products to display on the send
  po screen. More products will spill over to additional pages.
- **max display enter tracking screen** → Enter the maximum number of POs to display on the
  enter tracking screen. More POs will spill over to additional pages.
- **max display default subcontractor screen** → Enter the maximum number of products or
  manufacturers to display on both the default subcontractor screens. More products or
  manufacturers will spill over to additional pages.
- **notify customer** → 0 - no customer notification of PO updates, 1 - notify customer
  - o This controls whether or not customers will receive an email when tracking information is
    added to their order. Regardless of this setting, this information will be added to the order
    history, which can still be accessed by the customer when they log in. In an effort to reduce
    the amount of emails that customers receive, the purchase orders module will never send an
    email to your customer when a purchase order is sent. Hence, this setting will not affect the
    behavior when a purchase order is sent.
- **subject** → subject line for emails sent to subcontractors
  - o You may include the follow tags in the email subject line:
    - ▪ {po_number} – Purchase Order Number
    - ▪ {order_number} – Order Number

- ■ {contact_person} – Subcontractor Contact Person
- ■ {full_name} – Full Name of Subcontractor
- ■ {short_name} – Short Name of Subcontractor
- **from email name** → The FROM email NAME for sent Purchase Orders
- **from email address** → The FROM email ADDRESS for sent Purchase Orders
- **sent comments** → Comments added to order history when purchase orders are sent.
  - o Once you've sent one purchase order for an order, this comment will not be added to the order history again.
  - o To not add any comments to the order history when a purchase order is sent, leave this field blank. The status of the order will still be changed, but no comments will be added.
  - o To prevent any changes at all to the order history when a purchase order is sent, leave this field blank and leave the "po sent status" field blank as well.
- **full ship comments** → Comments added to the account when the order has shipped in full
- **partial ship comments** → Comments added to the account when part of the order has shipped
- **ignore status** → Enter status of orders that you want to ignore on the send PO page and the enter tracking page. For multiple entries, just separate with a comma. For example: canceled,fraud,noship
- **new order status** → status of new orders
  - o It is important to set this value so that new orders will be recognized properly.
  - o Any orders that are not "new order status" will not change to "po sent status" when the first purchase order is sent for the order. This prevents orders using alternate status systems, like Google Checkout orders, from having their status changed when a purchase order is sent.
- **po sent status** → status to change orders to after the first purchase order is sent
  - o Leave this blank to prevent orders from changing status when the first purchase order is sent. The "sent comments" will still be added to the order history.
  - o Leave this blank and the "sent comments" blank to prevent any changes to the order history when a purchase order is sent.
- **po shipped status** → status to change orders to after all items from the order have shipped
  - o If several purchase orders are sent to different subcontractors for one order, the status will not be changed unless ALL subcontractors have shipped ALL items in the order. However, each shipment will update the order history with the tracking information and the partial ship comments. The final shipment will update the order history with the tracking information and the full ship comments. All shipments will cause an email to be sent to the customer with this information if the "notify" option is turned on.
  - o Leave this blank to prevent orders from changing status when all items from the order have shipped.
- **change shipping from** → Change this shipping option to something else on POs, Packing Lists, and Text File Attachments
  - o This is great for shipping options that would make little sense to a subcontractor, but make perfect sense to a customer. For example, if you call your shipping "Holiday Value Shipping" for your customers, you could change this to "Cheapest" for your subcontractor.
- **change shipping to** → Value to change shipping option to on POs, Packing Lists, and Text File Attachments
  - o This is great for shipping options that would make little sense to a subcontractor, but make perfect sense to a customer. For example, if you call your shipping "Holiday Value Shipping" for your customers, you could change this to "Cheapest" for your subcontractor.
- **packinglist filename** → filename for PDF packing list attachment

- **text file filename** → filename for text file attachment
- **text file mime type**→ mime type for text file attachment (determines default program to open file in many operating systems)
- **replace in both email and text file** → Click the link to take you to a page where you can make substitutions in the email and/or text file attachment. See "Edit Subcontractor" section of manual for more information.
- **replace in email only** → Click the link to take you to a page where you can make substitutions in the email and/or text file attachment. See "Edit Subcontractor" section of manual for more information.
- **replace in text file only** → Click the link to take you to a page where you can make substitutions in the email and/or text file attachment. See "Edit Subcontractor" section of manual for more information.
- **expected delivery date status** → When an expected delivery date is entered, the status of the order will change to this status. Leave it blank for no change in status.
- **expected delivery date order comments** → These are the default comments that are sent to the customer when an expected delivery date is added. They can always be edited to suit your needs on the fly, so you should write a message here that will be the most common message used. Tags can be used as follows:
  - {is_are}, {it_them}, {capital_It_They} → These tags are used for plural and singular language such that your comments will make sense depending on how many products are affected.
  - {product_list} → This will list all the products that are affected.
  - {expected_ship_date} → This will be the expected ship date that is entered.

Custom Messages and PDF Packing List Customization require a more lengthy explanation. Please read below:

CUSTOM MESSAGES

In addition to expected delivery dates, you can enter custom messages here. For example, you could define a custom message for discontinued items that informs the customer and cancels the order. You can have up to three custom messages. Just leave these blank if you do not want to use custom messages.

Custom messages have three parts:
- Order Comments: These are the default comments that are sent to the customer when a custom message is chosen. They can always be edited to suit your needs on the fly, so you should write a message here that will be the most common message used. Leave this blank for no custom message. Tags can be used as follows:
  - {is_are}, {it_them}, {capital_It_They} → These tags are used for plural and singular language such that your comments will make sense depending on how many products are affected.
  - {product_list} → This will list all the products that are affected.
  - {expected_ship_date} → For custom messages, this will be the custom message name unless you override this name by entering something else in the expected ship date field.
- Custom Message Name: This is the name that will be used to identify your custom message. It will also be used as the Expected Ship Date when this field is left blank.

- Order Status: The order status will change to whatever you enter here when you chose a custom message. Leave this blank for no status change.

PDF PACKING LIST CUSTOMIZATION

PDF Packing Lists have been replaced in version 6 with custom PDF files. These attachments can be customized to suit your needs. They can even be changed to look like invoices or sales receipts.

Customization can be complicated, so be sure to read this section carefully. If you were happy with the PDF packing lists from the previous version, then leave most of these settings alone! You will have your old packing list.

To preview your progress, go the send PO page, send a PO and click the review before sending checkbox. Then, click on the link to preview the packing list.

The first few entries are simply text that will show up on the packing list. Edit it to suit your needs. Because database entries with an enter at the beginning will lose this enter, we have added the tag {enter} to all fields here. This can help to align things. For instance, you may want to add your logo above your address, but they overlap. No problem, just use the tag {enter} to push your address down. Experiment as needed to achieve the correct alignment.

The date entry uses standard PHP date format. For more info see here:
http://php.net/manual/en/function.date.php

The first address and second address entries are for the left-most customer address and the right-most customer address on the PDF attachment respectively. Tags include {cust_ad} - customer address, {bill_ad} - billing address, and {ship_ad} - shipping address.

The product list can be customized as needed. There are a maximum of five columns. The total width of the product list is 185.9mm, so make sure all your columns adds up to 185.9mm. To use less than five columns, just set some columns to zero and leave them blank. For each part of the product list, you need the following information:
- Title: This is the name this column and will appear above it.
- Content: This is what will be in the column. You can use the following tags:
  - {products_quantity}
  - {products_name}
  - {products_model}
  - {manufacturers_name}
  - {products_attributes}
  - {final_price}
- Width: This is in mm. Remember, they must all add up to 185.9mm.
- Justification: L – Left, R – Right, C – Center

There is a lot going on with the upper and lower comments. Read these bullets to help understand them:

- The upper comments will be inside the packing list product list. The lower comments will be below the packing list product list. Both of these comments can be customized as needed.
- The upper comments will only show on the last page of the packing list. The lower comments will show on each page of the packing list.
- The upper comments can be moved left and right. Neither the upper nor the lower comments can be moved vertically.
- When entering the range for the upper comments location, start from the left of the page and measure in mm to where you would like it to start. Then, start from the left of the page and measure in mm to where you would like it to stop. The defaults are setup such that all the upper comments will fall into the second default column, 40-140. Note that the margins of the page are 15mm. With a little bit of math, you should be able to restrict it to one column as well if you choose.
    - Here's an example. Column 1 is 50mm wide. Column 2 is 50mm wide. So, 65-105 will keep the text in column 2 with a little white space at the end. Because: 15+50=65 and 15+50+50=115-10(white space on end)=105
- The upper and lower comments also have names. These names are used internally to ask whether or not you would like to include them. Leave the name blank to always include them.
- Leave the content in the upper or lower comments blank for none. If you leave the upper comments blank, your products will extend further down the packing list.
- The upper and lower comments can be different for orders that are completed in one shipment, or full ship POs, and orders that are completed in multiple shipments, or partial ship POs.

Include totals and subtotals and show all products are great options for turning the packing list into an invoice or a sales receipt. They do exactly what they say they do! :)

Lastly, you can add up to two pictures to your Packing Lists. For each picture, you need a filename in the admin directory, a location on the Packing List, and a width for the picture. The height will be calculated automatically in order to keep the picture proportional. This is a great way to add your logo or other pictures to a packing list. Give your coordinates as x,y in mm -> x is mm from left of page, y is mm from top of page. The standard page is 215.9mm wide and 279.4mm high. The coordinate you choose is for the upper-left corner of the picture added.

E-mail and Text File Attachment Template System and Tags

In the email directory, you will find three files that allow you to customize the purchase order email and the text file attachment.

Purchase Order Email Comes From(in this order):	Text File Attachment Comes From(in this order):
email_header.txt	textattach_header.txt
email_products.txt (repeats over and over for every product in PO)	textattach_products.txt (repeats over and over for every product in PO)
email_footer.txt	textattach_footer.txt

Simply change any of these files to change the email purchase orders that are sent and the text file attachments that are sent. Because PDFs are more complicated, this was not really feasible with the PDF attachments, so if you don't like the way the PDF attachments are laid out you are out of luck. But, you could certainly create a custom text-based packing list using the text file attachment template files. Text file attachments also allow you to create a custom .csv file, tab-delimited files, rich-text format files, or any other file format that is stored as text to attach to your purchase order email.

The best way to create .csv files for spreadsheet programs or .rtf files for word processor programs is to create the file in the spreadsheet program or the word processor program and include the tags you want to use. Make sure to save them as .csv or .rtf. Then, using a text editor, simply break up the file into three different files: textattach_header.txt, textattach_products.txt, and textattach_footer.txt. Make sure all the product info is in the products file. This makes it easy to design word processor templates or spreadsheet templates that attach to your emails.

The template files use a system of tags. These tags are always enclosed with {}.

You can customize email purchase orders and text file attachments using these tags. First you need to find the subcontractor id. To take a section of the templates out for a particular subcontractor, you can use {- the subcontractor's id number to take out } text to take out {/- the subcontractor's id number to take out }. So the following example would remove "cats and " from the template when sending to subcontractor id 7:

```
********************************************************************************
The {-7}cats and {/-7}dogs are cute.

SUBCONTRACTOR 7 SEES: The dogs are cute.
ALL OTHER SUBCONTRACTORS SEE: The cats and dogs are cute.
********************************************************************************
```

To add a section of the templates ONLY for a particular subcontractor, you can use {+ the subcontractor's id number to add to } text to add to {/- the subcontractor's id number to add to }. So the following example would add "cats and " to the template when sending to subcontractor id 7:

****
Watch out for the {+7}cats and {/+7}dogs.

SUBCONTRACTOR 7 SEES: Watch out for the cats and dogs.
ALL OTHER SUBCONTRACTORS SEE: Watch out for the dogs.
****

You can also list several subcontractors when add or removing sections from a purchase order email or text file attachment. Just separate their numbers with a comma, like the following example:

****
{+1,2,3,4,5}Hello, {/+1,2,3,4,5}Kind Sir: Please ship this order{-1,2,3,4,5} now{/-1,2,3,4,5}.

SUBCONTRACTORS 1,2,3,4, and 5 SEE: Hello, Kind Sir: Please ship this order.
ALL OTHER SUBCONTRACTORS SEE: Kind Sir: Please ship this order now.
****

You can also add and remove sections from a purchase order email or text file attachment when sending purchase orders for an unknown customer. Instead of using a subcontractor id number in the tag, simply using a capital "U":

****
{+U}This customer is not in our database. {/+U}Please ship this order.{-U} Send Track Info To:{/-U}

UNKNOWN CUSTOMER POs SAY: This customer is not in our database. Please ship this order.
ALL OTHER POs SAY: Kind Sir: Please ship this order. Send Track Info To:
****

Unknown customer "U" tags can also be combined with subcontractor id tags using commas as follows:

****
{+U,1,5,8}Unknown customers, subcontractor 1,5, and 8 see this, but no one else does!{/+U,1,5,8}
****

I thought about creating separate files for each subcontractor, but I decided against it because this will be easier for small changes to purchase orders and text file attachments. Plus, for big changes, you can simply put the whole email in a {+} tag for each subcontractor, effectively creating different sections for each subcontractor.

{+} and {-} tags may be nested in each other. However, there are a few tag and nesting rules you must follow for them to work properly:

1) Closing tags must match opening tags exactly. Doing so will cause the following error in your email file or text attachment: *** ERROR - CHECK { + } TAGS FOR ERRORS *** or *** ERROR - CHECK { - } TAGS FOR ERRORS ***

BAD	GOOD
{+1,2,3}Test{/+3,1,2}	{+3,2,1}Test{/+3,2,1}

2) Nested {+} and {-} tags must not include the same exact tag. Doing so will cause the following error in your email file or text attachment: *** ERROR - NESTED { + } OR { - } TAGS WITH SAME SUBCONTRACTOR VALUES. ALL NESTED TAGS NEED DIFFERENT VALUES. ***

BAD	GOOD
{+1}Test {+1}This {/+1}Baby!{/+1}	{+5,3,4}Test {+5}This {/+5}Baby!{/+5,3,4}

3) Nested {+} and {-} tags must open and close in the same order. No error will be shown if this happens, so you need to be especially careful about this. Some purchase orders with certain subcontractors may look fine, while others may not, so be careful about this!!!

BAD	GOOD
{+1,2,3}Test {-6}This {/+1,2,3}Baby!{/-6}	{+1,2,3}Test {-2}This {/-2}Baby!{/+1,2,3}

All other tags are used to incorporate order information. Because these tags do not need to be closed, nesting is not an issue. Feel free to use them anywhere in the templates, including inside of a {+} or {-} tag. A list of order information tags and where they may be used are on the next page.

Header, Footer, and Product Tags

{po_number} - Purchase Order Number
{order_number} - Order Number

{customers_name} - Name of Customer
{customers_company} - Name of Company for Customer
{customers_address} - Customer's Address
{customers_street_address} - Customer's Street Address
{customer_suburb} - Second Line of Customer's Street Address
{customers_city} - Customer's City
{customers_state} - Customer's State Name
{customers_state_code} - Customer's State Abbreviation/Code
{customers_postal_code} - Customer's Postal Code
{customers_country} - Customer's Country

{customers_phone} - Customer's Phone Number
{customers_email} - Customer's Email Address

{delivery_name} - Name of Person for Shipping
{delivery_company} - Name of Company for Shipping
{delivery_address} - Shipping Address
{delivery_street_address} - Shipping Street Address
{delivery_suburb} - Second Line of Shipping Street Address
{delivery_city} - Shipping City
{delivery_state} - Shipping State
{delivery_state_code} - Shipping State Abbreviation/Code
{delivery_postal_code} - Shipping Postal Code
{delivery_country} - Shipping Country

{billing_name} - Name of Person for Billing
{billing_company} - Name of Company for Billing
{billing_address} - Billing Address
{billing_street_address} - Billing Street Address
{billing_suburb} - Second Line of Billing Street Address
{billing_city} - Billing City
{billing_state} - Billing State
{billing_state_code} - Billing State Abbreviation/Code
{billing_postal_code} - Billing Postal Code
{billing_country} - Billing Country

{po_comments} - Comments you enter on Send PO page for the PO
{customers_comments} - The customer's order comments
{shipping_method} - Shipping Method
{payment_method} - Payment Method
{date_purchased} - Date Purchased

{contact_person} - Subcontractor Contact
{full_name} - Full Name of Subcontractor
{short_name} - Short Name of Subcontractor
{subcontractors_id} - Subcontractor's ID Number
{street} - Subcontractor's Street Address
{city} - Subcontractor's City
{state} - Subcontractor's State
{zip} - Subcontractor's Zip Code
{telephone} - Subcontractor's Telephone Number
{email_address} - Subcontractor's Email Address

{tracking_link} - Link for Subcontractor to Enter Tracking Number

Product Only Tags

{products_quantity} - Quantity of Product
{products_name} - Name of Product
{products_model} - Model of Product
{manufacturers_name} - Manufacturer of Product
{products_attributes} - Product Attributes
{final_price} - Price of Product

E-mail Title Tags (Configure in Admin Purchase Orders Configuration)

{po_number} - Purchase Order Number
{contact_person} - Subcontractor Contact
{full_name} - Full Name of Subcontractor
{short_name} - Short Name of Subcontractor
{order_number} - Order Number
{shipping_method} - Shipping Method

Send Purchase Orders

To send purchase orders go to Customers → POs – Send/Resend in the admin section. Here, you will find a list of all the orders that have not been marked "shipped", either by the purchase order mod or by Zen Cart's status system.

To make it easier to distinguish between different orders and products, there is a color coding system. The background color of each product ordered alternates between light gray and white, just like all lists in Zen Cart's admin section. Each order alternates between black and blue text. Orders are always grouped together, so it is easy to distinguish between different products and different orders. Of course, order numbers are also listed, but this system makes it easier to tell at a glance which orders and products are which.

To send a purchase order for a particular product ordered, simply check the box under "send PO yes/no" and change the subcontractor for each product to whomever you wish the purchase order to go to. To make your life easier, you can also click the "CHECK ALL" link to check all the boxes for you. Then, at the bottom of the page, click send. There are several other options and details that are discussed below, but this is the basic process. You can send as many purchase orders as you want at a time. The system will automatically group products in the most efficient manner as described in detail in the "How Orders Are Processed" section of this manual.

There are several options on the send orders page as follows:

- **Show Newest/Oldest Orders First** → Click this link to switch from Descending to Ascending order or vice-a-versa.
- **Comments for Purchase Orders** → This allows you to place a custom comment in any purchase order email or text file attachment. It will appear wherever you use the {po_comments} tag in the email file header or footer template or the text file attachment header or footer template.
- **Comments for Packing Lists** → This allows you to place a custom comment in any PDF packing list.
  - **As Customers Comment** → Check this box and your comment for the packing list will appear as though it was the customer's comments. This is a handy feature to use when a customer's order comments are half for you and half for the recipient of the shipment. Just enter the part that was for the recipient of the shipment in the "comments for packing lists" field and check the "as customers comment" box.
- **Include Packing List** → Check this box to include the PDF packing list. This option will only show if you chose one of the "sometimes" options for PDF packing lists on the Purchase Orders configuration page.
- **Add Upper/Lower Comments to Packing List** → Check this box to include the upper or lower comments on the packing list.
- **Include Text File Attachment** → Check this box to include the text file attachment. This option will only show if you chose one of the "sometimes" options for text file attachments on the Purchase Orders configuration page.
- **Review E-mail Before Sending** → Check this box to review and edit the email before sending.

Resend Purchase Orders

There are certain situation that require you to resend a purchase order. For example, if the first subcontractor was out of an item, you might want to send the purchase order to another subcontractor. To resend purchase orders go to Customers → POs – Send/Resend in the admin section. Then, click on the "View old POs and resend them" button. Here, you will find a list of options that allow you search for old purchase orders. If you click the "search" button immediately, it will find all purchase orders that have not been marked as shipped either as a Zen Cart status or through the Purchase Orders mod.

You can also search for other purchase orders using the following fields:

- **Data From** → This will search between two given dates when a purchase order was last sent. Use the format YYYY-MM-DD.
- **2nd Part of Last PO** → The first part of any PO number is the order number. The 2nd part of any PO number is unique to that PO. Enter the 2nd part of any PO to search for that specific PO.
- **Order #** → This will search for any POs for a specific order.
- **Subcontractor** → Search for all orders sent to a specific subcontractor.
- **Show {po shipped order status} Orders** → This will cause orders to show up even if they have been marked as the po shipped order status that you defined in the Purchase Orders configuration page. They are usually excluded because people generally don't want to resend orders that have already shipped. (Although this may happen sometimes if merchandise is defective and you need to send another one out.)
- **Oldest First** → Usually, the purchase orders are in ascending order based on the order number. Checking this box reverses the order of the purchase orders listed.
- **All Checked** → This will automatically check all the send PO boxes when the page loads.

Feel free to use any combination of these values to limit your search.

Once you've searched for and found old purchase orders, the resend page works much like the send page.

Just like sending purchase orders, the resend makes makes it easier to distinguish between different orders and products using a color coding system.

Just like sending purchase orders, you can resend a purchase order for a particular product ordered by checking the box under "send PO yes/no", changing the subcontractor for each product to whomever you wish the purchase order to go to, and clicking send. The same options that are available with the send orders page are available with the resend orders page. The system will automatically group products in the most efficient manner as described in detail in the "How Orders Are Processed" section.

If you resend only part of an old purchase order, only the part you resend will be changed to a different subcontractor. So, for example:
Order 1 -- Product A, B, and C sent to subcontractor 10.
Subcontractor 10 calls and says B and C are out of stock! So, I tell them to go ahead and ship A.
I resend product B and C to subcontractor 11 who ships these. Subcontractor 10 keeps product A.

Review and Edit Purchase Order E-mail and Text File Attachment Before Sending

Email Title | New order (#512-1470) for Some Subcontractor

Send Email To | subcontractor@subcontractor.com

Email Body

```
TO: A Subcontractor, Subcontractor Address, SUB CITY, CA 12345 (555-555-1212)

Please ship the following dropship order and charge the
credit card we have on file with you.

** Please affix a copy of the .PDF packing slip to the box.
** It is attached to this email.

PO #512-1470 (Purchase Date: 2008-05-05 01:07:35)

SHIP TO
----------------
Customer Joe
555 Test St. & Broadway
Test City, Florida 44444
United States
Phone: 555-555-1212
SHIPPING METHOD: Flat Rate/Free Shipping over $75 (Best Value)
When shipping UPS, ship on 3rd party billing->UPS Acct 66V18V

PRODUCTS ORDERED
----------------
Product Name: Cool Springs Press - Widget & Beautiful
Model: WIDGET-1 Color: Green&Blue Qty: 1
```

When sending or resending a purchase order, you may want to either review the email/text attachment or edit the email/text attachment. To do so, simply click the "Review E-mail Before Sending" check box. This will take you to a second page with the email, and if attached, the text attachment. There will also be a link which will allow you to preview the PDF packing list attachment. You can edit the email and text attachment as you see fit before sending it. If you decide to abort the process, no problem. Just navigate away from the page, and nothing will be affected.

Please note that only one purchase order can be edited at a time. (Many products may be included in the purchase order, but only one purchase order can be sent at a time through the review and edit page.) If you try to send more than one purchase order at a time through the review and edit page you will receive an error, and the process will be aborted. No need to worry if this happens, nothing has been sent to your subcontractor.

Send Purchase Orders for Unknown Customers

You may need to send a purchase order for a customer who did not purchase your product through Zen Cart. For example, you may have sold something on ebay or over the phone. Creating a custom purchase order email, pdf packing list, and text file attachment is time consuming, so I've included a simple way to send purchase orders for unknown customers, or customers who are not in the Zen Cart database. Because these customers are not in the database, no information is saved to the database when these orders are sent, and the tracking functionality doesn't work either. But, you do get easy purchase orders that look just like your other ones in a few simple steps.

To send purchase orders for unknown customers go to Customers → POs – Send for Unknown Customers in the admin section of Zen Cart. The page is laid out like a purchase order or invoice, so it is very easy to use. At the bottom of the page, many of the same options that are available on the send purchase orders page are available. In addition, there is an option for "partial shipments". Since there is no database information about this order, this setting determines the message that will be on the PDF packing list. If you check the box, the partial ship message you created in the purchase orders configuration page will be used. If not, the full ship message will be used.

Feel free to leave the shipping option blank. If you do so, the "change shipping to" option from the purchase orders configuration page will be used.

Feel free to leave the shipping address blank. If you do so, the billing address you entered will be used.

ADD A PRODUCT

STEP 1: Gift Certificates

STEP 2: $50 Gift Certificate

STEP 3: *No Options - Skipped...*

STEP 4: 1 Qty.　　　　　　　　Add now

Once you have entered this data, you can begin to add products. While you go through the steps of adding products, please do not change other information on the purchase order, or you will lose your changes. Wait until you've finished adding a product to make any changes. Simply enter the category of the product you want to add. Then, find the product name. Next, add any options for the product if there are any. Finally, choose the quantity. The product will be added to the purchase order. To add more products, click on the "Add Another Product" button and follow the same steps. You can always make changes to the product information once you've added a product by simply editing the data on the screen.

Once you are satisfied with your purchase order, just click the "send" button and you are done. Please do not use the back button or the refresh button on this page. Doing so may resend a purchase order.

Because it would be difficult to fit all the information possible on the send purchases orders for unknown customers page, many tags that work with regular purchase orders do not work with purchase orders for unknown customers. If any of these tags are included in your purchase order email or text attachment templates, the tags will simply be removed before a purchase order is sent. However, the text surrounding these tags may still not make sense. To fix this problem, use the {-U}{/-U} tags to remove any section of the purchase order email or text attachment when sending a purchase order to an unknown customer. You can also add sections to purchase orders for unknown customers by using the {+U}{/+U} tags. See the "Email and Text File Attachment System and Tags" section of this manual for more information on using the {+} and {-} tags.

In addition, the same issues makes it difficult to use the customizable PDF Packing Lists when sending POs for unknown customers. Hence, the PDF packing list will be the default one for all orders sent for unknown customers. The only changes that you will see are in your upper and lower comments. All other aspects of the PDF Packing List for unknown customers will use the default settings or version 5 and below settings.

Here is a list of tags that work with purchase orders for unknown customers and what they will display. Tags that display different information than in a regular purchase order have a star next to them.

Header, Footer, and Product Tags

{po_number} - Purchase Order Number
*{order_number}- Displays Purchase Order Number
*{customers_address} – Shows Billing Address
{delivery_address} - Shipping Address
{billing_address} - Billing Address
{po_comments} - Comments you enter on Send PO page for the PO
{shipping_method} - Shipping Method
*{date_purchased} – Date Purchase Order Sent
{contact_person} - Subcontractor Contact
{full_name} - Full Name of Subcontractor
{short_name} - Short Name of Subcontractor
{subcontractors_id} - Subcontractor's ID Number
{street} - Subcontractor's Street Address
{city} - Subcontractor's City
{state} - Subcontractor's State
{zip} - Subcontractor's Zip Code
{telephone} - Subcontractor's Telephone Number
{email_address} - Subcontractor's Email Address

Product Only Tags

{products_quantity} - Quantity of Product
{products_name} - Name of Product
{products_model} - Model of Product
{manufacturers_name} - Manufacturer of Product
{products_attributes} - Product Attributes

E-mail Title Tags (Configure in Admin Purchase Orders Configuration)

{po_number} - Purchase Order Number
{contact_person} - Subcontractor Contact
{full_name} - Full Name of Subcontractor
{short_name} - Short Name of Subcontractor
*{order_number} - Displays Purchase Order Number

Here are a list of tags that will be blank on purchase orders for unknown customers and what they usually display on regular purchase orders.

Header, Footer, and Product Tags

{customers_phone} - Customer's Phone Number
{customers_email} - Customer's Email Address

{customers_name} - Name of Customer
{customers_company} - Name of Company for Customer
{customers_street_address} - Customer's Street Address
{customer_suburb} - Second Line of Customer's Street Address
{customers_city} - Customer's City
{customers_state} - Customer's State Name
{customers_state_code} - Customer's State Abbreviation/Code
{customers_postal_code} - Customer's Postal Code
{customers_country} - Customer's Country

{delivery_name} - Name of Person for Shipping
{delivery_company} - Name of Company for Shipping
{delivery_street_address} - Shipping Street Address
{delivery_suburb} - Second Line of Shipping Street Address
{delivery_city} - Shipping City
{delivery_state} - Shipping State
{delivery_state_code} - Shipping State Abbreviation/Code
{delivery_postal_code} - Shipping Postal Code
{delivery_country} - Shipping Country

{billing_name} - Name of Person for Billing
{billing_company} - Name of Company for Billing
{billing_street_address} - Billing Street Address
{billing_suburb} - Second Line of Billing Street Address
{billing_city} - Billing City
{billing_state} - Billing State
{billing_state_code} - Billing State Abbreviation/Code
{billing_postal_code} - Billing Postal Code
{billing_country} - Billing Country

{customers_comments} - The customer's order comments
{payment_method} - Payment Method
{tracking_link} - Link for Subcontractor to Enter Tracking Number

Product Only Tags
{final_price} - Price of Product

Enter Tracking Information From Admin or From Subcontractor Purchase Order E-mail

If you decide to install TY Package Tracker, several options are available that make tracking notification, order status updates, and order history updates easy. Please note that this modification assumes that you leave the default order of carriers in TY Package Tracker as follows:

1) FedEx
2) UPS
3) USPS
4) DHL

Please enter tracking information or an expected ship date for this purchase order.

PO number	PO date	Customer info	Add Tracking ID
512-5369	2010-07-16	Customer Joe 555 Test St. & Broadway Test City, Florida 44444 United States	☐ FedEx ____ ☐ UPS ____ ☐ USPS ____ ☐ DHL ____ ☐ ____

----- OR -----

Enter or Change Expected Ship Date
Expected Ship Date or Date Range: ____

Included	Product name	Expected Delivery Date
☑	Special, Fancy Widget	January 5th
☑	Widget & Beautiful State: Alabama	Wait List

save

If you subcontractor is willing to enter tracking information when a product ships, simply include the {tracking_link} tag in your email template file. When they click on this link they can enter a tracking number and choose which products have shipped. If all the products ship, they are done. If only some of the products ship, they have the option of returning to this page and entering another tracking number for items that haven't shipped.

Once the subcontractor enters the tracking information, the order history is updated with the tracking information and any status changes or comments that were configured in the Purchase Order configuration page. In addition, if "po notify" is set to "1" in the Purchase Order configuration page, an email will be sent to your customer with a tracking link and a list of products that shipped. If the order has shipped, but no tracking is available, they can just put a checkbox next to the shipment method and click save. Everything is done for you – easy, easy, easy.

If your supplier is not ready to ship the product yet, but they have an ETA, they can simply enter it and click save. This will notify your customer of the ETA and save this info in the database.

This is all great, but the reality is that most subcontractors will probably not be willing to enter the tracking information for you online. However, many subcontractors are willing to send automatic emails to you via their carrier when a product ships. In this case, the responsibility of entering tracking information falls on you. I've made this as easy as possible by designing a simple page to enter this information. Simply go to Customers → Enter tracking #s in the admin section of Zen Cart.

You will find a page that lists all the purchase orders which have not shipped or have not had their status changed to the po sent status or po ignore status you defined in the Purchase Orders configuration page. The expected delivery dates will also be listed. A link is also provided to contact the subcontractor. Click it, and you will see a preview of an email inquiring about this shipment. Change it as needed. Then, send it. A record of all contacts will be kept and displayed on this page.

The subcontractor inquiry email can also be customized permanently. Simply edit the /email/email_supplier.txt file. You can use the following tags in email_supplier.txt:

{contact_person} – Subcontractor's Contact
{full_name} – Full Name of Subcontractor
{short_name} – Short Name of Subcontractor
{subcontractors_id} – Subcontractor's ID
{street} – Street Address of Subcontractor
{city} – City of Subcontractor
{state} – State of Subcontractor
{zip} – Zip Code of Subcontractor
{telephone} – Telephone Number of Subcontractor
{email_address} – Email Address of Subcontractor
{po_number} – PO Number of Order
{order_number} – Order Number
{po_date} – PO Sent Date
{expected_date} – Expected Ship Date
{shipping_method} – Shipping Method
{products} – List of Products in the Order
{delivery_name} – Delivery Name
{delivery_company} – Delivery Company
{delivery_address} – Full Delivery Address
{delivery_street_address} – Delivery Street Address
{delivery_city} – Delivery City
{delivery_state} – Delivery State
{delivery_state_code} – Delivery State Code
{delivery_postal_code} – Delivery Postal Code
{delivery_country} – Delivery Country

Clicking on the purchase order number will bring up the tracking information page in an in-window GreyBox pop-up. Simply submit the tracking info, and this pop-up will disappear. The page will refresh automatically, which will remove the purchase order you just entered tracking info for. You can enter several tracking numbers for different purchase orders this way in a small amount of time. Just like when the subcontractor enters this information, the order history will be updated with the tracking information, any comments or status changes you configured for this mod will be applied to the order, and if you turned on "po notify" an email will be sent to your customer with tracking information and a list of products that shipped.

You'll notice that in addition to the expected ship date, you will also have the option for custom messages. Plus, you can modify the messages to your customer. These options are not available to the subcontractor in order to keep your customers separate from your subcontractors. For custom messages, simply click the checkbox and then click save.

If an order was placed through Google Checkout, a message will be placed in lieu of the tracking link that reads as follows:

Tracking link not available for this order. Please send an email with tracking number instead. Thank you!

On the enter tracking for purchase orders admin page a "GC" will appear before all orders that are for Google Checkout. This will link to where you can edit an order. This is also where the Google Checkout mod adds the ability to enter tracking information and mark the order as Goolge Shipped. (Please not that an order must first be marked Google Processing, or you will not be able to add tracking info.) IMPORTANT: All status numbers greater than 99 are assumed to be Google Checkout, so stick with status orders from 1-99 for all other orders.

Automatically Sending Purchase Orders

There are two ways to automatically send purchases orders. Each has their strengths and weaknesses.

Using a Cron Job	
Strengths	Weaknesses
* Sends all purchase orders at regular intervals. * All orders get sent no matter what – Customers can't break this process by accident.	* Orders are not sent as soon as they are received. * If someone can guess the password you used in send_pos_cron.php they may be able to send purchase orders.

Sending Purchase Orders Using the Checkout Success Page	
Strengths	Weaknesses
* Orders are sent as soon as they are received. * No one can send purchase orders from your site unless they purchase something, which is what you want anyway! :)	* Theoretically, someone could make a purchase, and then click the "stop loading page button" just at the right moment, which could theoretically prevent their purchase order from being sent. However, this would be very difficult to do, so it probably will never happen. Even if it does happen, the next customer who purchases something will cause the purchase order to be sent both for them and for the previous customer, which should solve the problem. *If you use an alternative checkout system that allows your customers to bypass the Checkout Success page, this method may not work for you. * May not be as secure. May expose admin directory to customer upon checkout completion if your customer is savvy.

Purchase orders that are automatically sent will use the default settings that you have setup including whether or not to attach a PDF packing list or a text file. Make sure you setup the default subcontractor to use with different products. Automatically sending purchase orders will always send purchase orders to your default subcontractor.

Please keep in mind that automatically sending purchase orders will send ALL purchase orders. In other words, if you setup automatic sending of purchase orders using the checkout success page, all purchase orders that have not been sent will be sent, even if they weren't from the recent order. This should only happen if you use another alternative checkout method that does not redirect customers to the checkout success page. If customer A uses this alternative checkout method, their purchase order won't be sent immediately. Then, when customer B uses the regular checkout method, once they reach the checkout success page, both customer A's purchase orders and customer B's purchase orders will be sent.

How Orders Are Processed

You're probably wondering how this mod decides which orders are grouped together and how many emails to send to subcontractors. The simple answer is that the most cost-effective way of doing so is always chosen. All products from the same order being sent to the same subcontractor at the same time will go together in one purchase order.

Here's an example to illustrate the concept:

Orders		
Order 100 Product A Product B Product C	Order 101 Product B Product C	Order 102 Product A

You send:
Order 100: Product A → Subcontractor X
Order 100: Product B → Subcontractor Y
Order 100: Product C → Subcontractor X
Order 101: Product B → Subcontractor Z
Order 101: Product C → Subcontractor Z
Order 102: Product A → Subcontractor Z

Purchase Order Emails Sent			
PO 100-1 to SUB X Order 100: Products A & C	PO 100-2 to SUB Y Order 100: Product B	PO 101-3 to SUB Z Order 101: Products B & C	PO 102-4 to SUB Z Order 102: Product A

Notice that in this example order 100 was split up into two emails because half the order when to subcontractor X and half the order went to subcontractor Y.

Notice that subcontractor Z received two emails because they received two different purchase orders for two different orders.