

# PRESTA PT INVOICE MANUAL

VERSION V1.0.0.0

DATE 2016



*Module that integrates Prestashop with Portuguese Billing Solution – Runs with PHC FX*

*Módulo que integra o Prestashop com uma Solução de Faturação Portuguesa – Runs with PHC FX*

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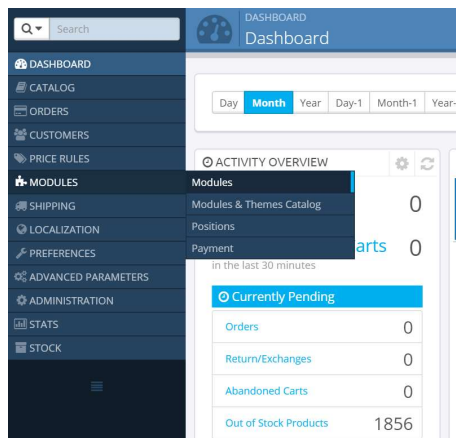
# INSTALLATION ENU

## Installation ENU

### ACCESS MODULES MANAGEMENT

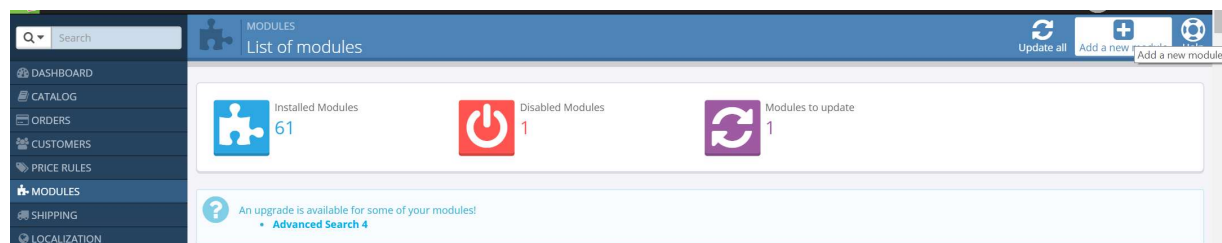
Login to your back office

Menu Modules -> Modules

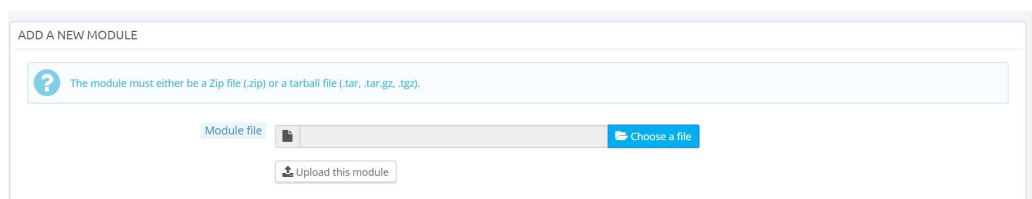


### UPLOAD PRESTA PT INVOICE MODULE

Add new module

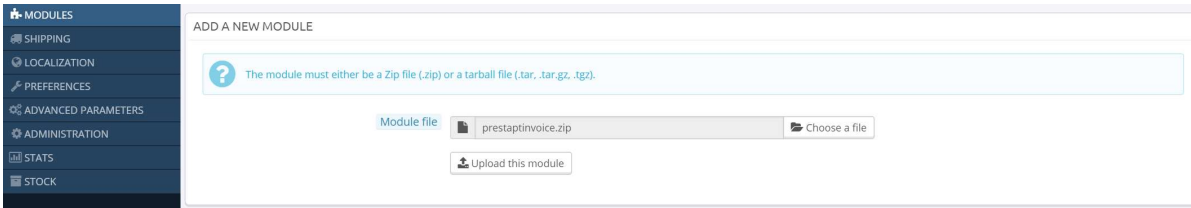


Locate file in your computer - Choose a file

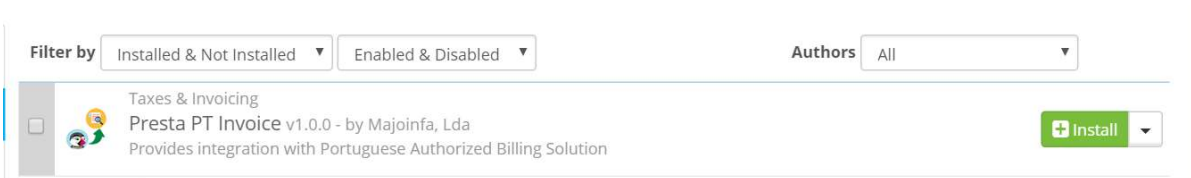


# INSTALLATION ENU

Upload the module to your store – Press “Upload this module”



Install the module – Press Install

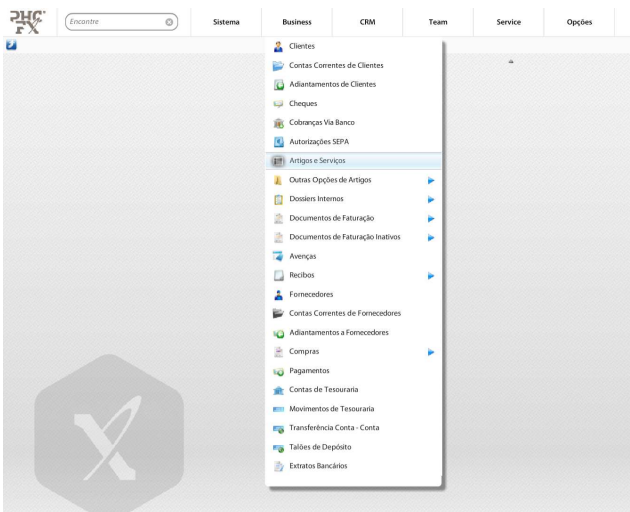


## CREATE SHIPPING SERVICE

Before using the Presta PT Invoice you must create a service in PHC FX that will be used to charge Prestashop shipping costs.

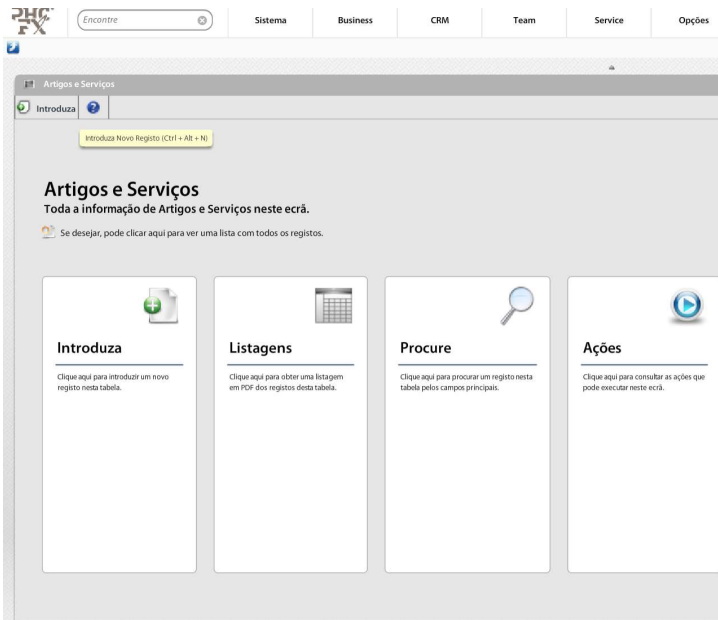
Access PHC FX

Access “Business” -> “Artigos e Serviços”

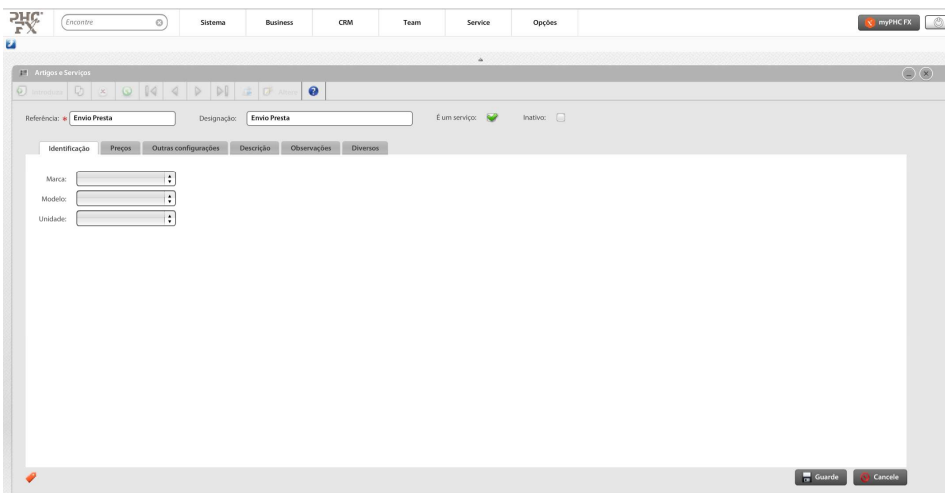


# INSTALLATION ENU

Click “Introduza”



Fulfill the form.



Copy the “Referência \*” that you created to Notepad

# INSTALLATION ENU

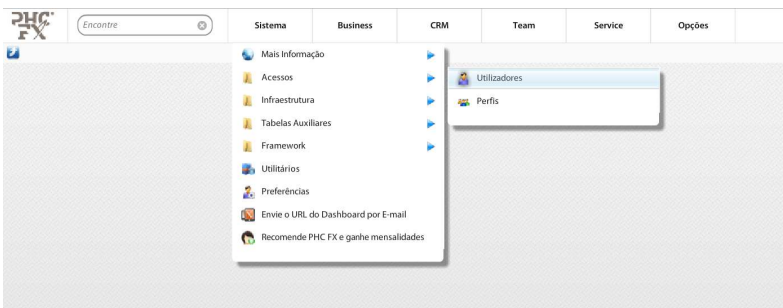


## CREATE INTEGRATION USER

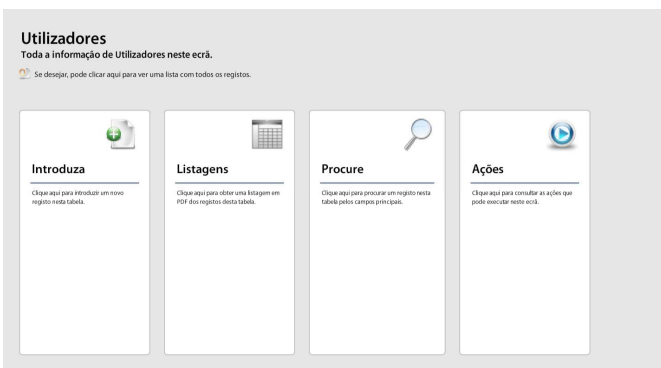
Before using the Presta PT Invoice you must create a user in PHC FX that will be used to Prestashop access PHC FX

Access PHC FX

Access "Sistema" -> "Acessos" -> "Utilizadores"



Click "Introduza"



# INSTALLATION ENU

Fulfill the form and press “Guarde”

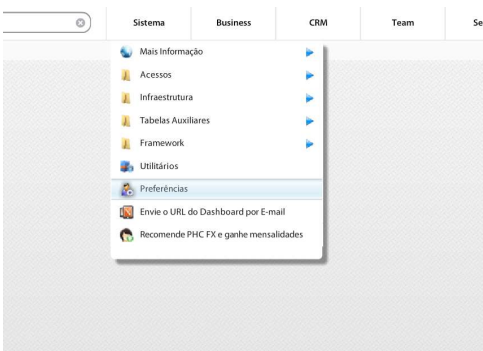
Copy the “Nome para login” to your notepad and the password created with activation process.

## GET DATABASE REFERENCE

Before using the Presta PT Invoice you must collect information regarding database “Empresa”

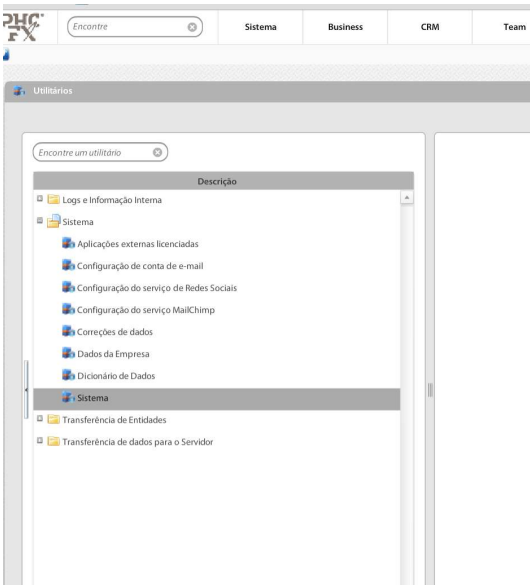
Access PHC FX

Access “Sistema” -> “Preferências”

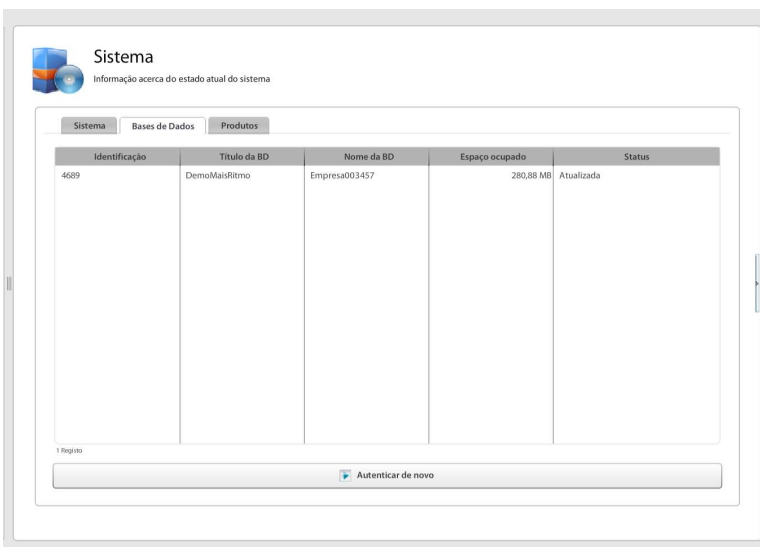


Access Sistema -> Sistema

# INSTALLATION ENU



Access Tab “Base de Dados” and write down the name in the “Nome da BD” column. In this example is “Empresa003457”



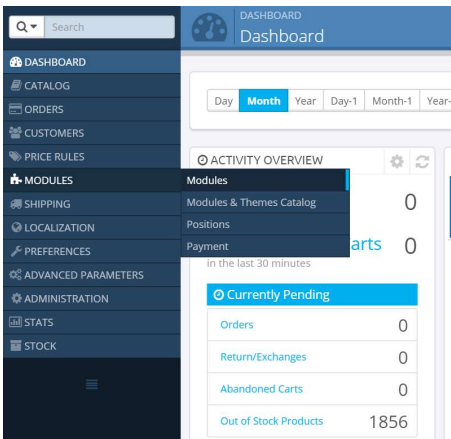
## CONFIGURE MODULE

Login to your back office

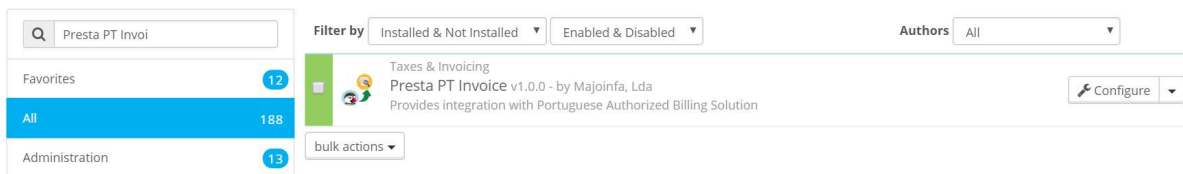
Access Menu Modules -> Modules



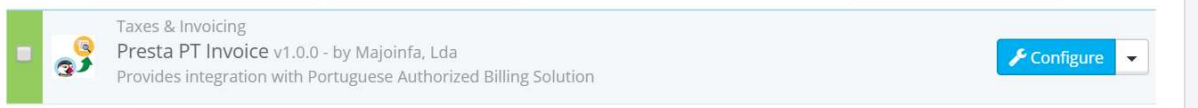
# INSTALLATION ENU



Search for Presta PT Invoice



Click “Configure”



Fulfill the following information:

URL - > The URL for accessing your PHCFX

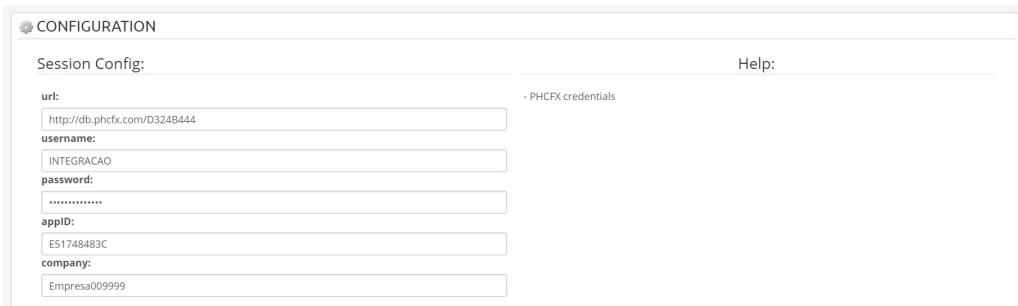
Username -> The username previously pasted to your notepad

Password - > Username password

appID - > E51748483C

Company - > The name of the “Base de Dados”

# INSTALLATION ENU



**CONFIGURATION**

**Session Config:**

**url:**  **Help:**

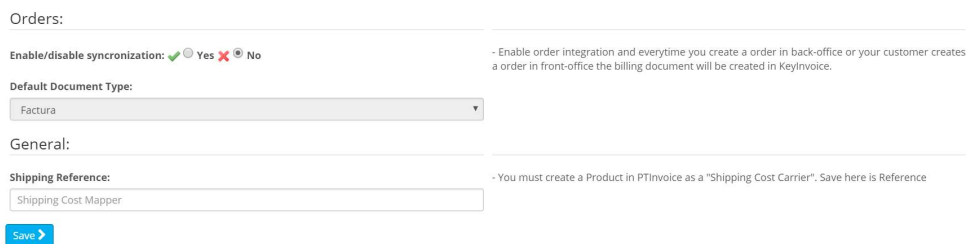
**username:**  - PHCFX credentials

**password:**

**appId:**

**company:**

Press "Save"



**Orders:**

**Enable/disable synchronization:** ☒ Yes ☐ No - Enable order integration and everytime you create a order in back-office or your customer creates a order in front-office the billing document will be created in KeyInvoice.

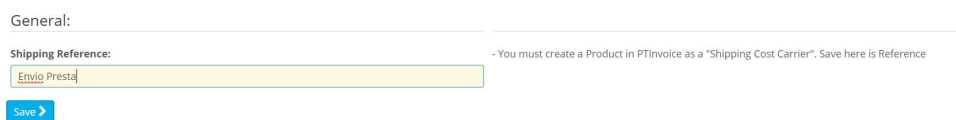
**Default Document Type:**

**General:**

**Shipping Reference:**  - You must create a Product in PTInvoice as a "Shipping Cost Carrier". Save here is Reference

[Save](#)

Copy Shipping Service "Referência" to "Shipping Reference" field and press save again



**General:**

**Shipping Reference:**  - You must create a Product in PTInvoice as a "Shipping Cost Carrier". Save here is Reference

[Save](#)

# USING PRESTA PT INVOICE - ENU

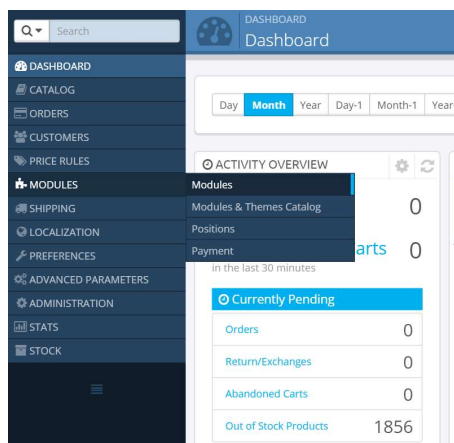
## Using Presta PT Invoice - ENU

### ACTIVATE PRODUCT INTEGRATION

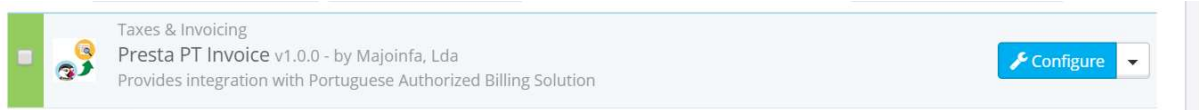
You can choose to have your products integrated with PHC FX, when integrated every time you save your product in your online Prestashop store the product will be created or updated in PHC FX

Login to your back office

Menu Modules -> Modules



Search for Presta PT Invoice Connector Module and click “Configure”



### Enable Products Integration Configuration

Products:

Enable/disable synchronization: ☒ Yes ☐ No

- Enable product integration and everytime you save your product it will be created in KeyInvoice.

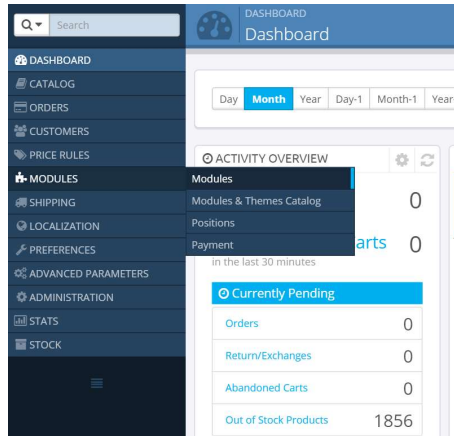
### ACTIVATE CUSTOMERS INTEGRATION

You can choose to have your customers integrated with PHC FX, when integrated every time a customer is created in the front office a customer will be created or updated in PHC FX

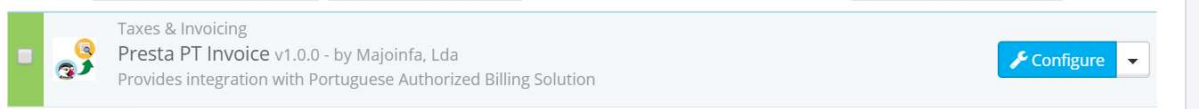
# USING PRESTA PT INVOICE - ENU

Login to your back office

Menu Modules -> Modules



Search for Presta PT Invoice Module and click “Configure”



Enable Customers Integration

Customers:

Enable/disable synchronization: ☒ Yes ☐ No

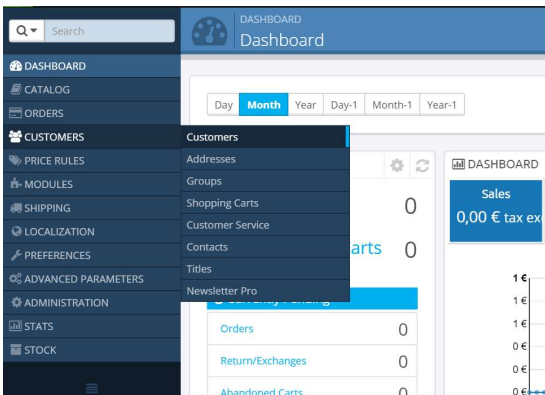
- Enable customer integration and everytime you save customer information in fron-office or back-office your customer information will be created / updated in KeyInvoice.

## MANUAL CUSTOMER CREATION

If needed you can create or update a customer in PHC FX on demand.

Access Customer List: Customer -> Customer

# USING PRESTA PT INVOICE - ENU



Select a customer

|    |      |         |       |                            |        |   |   |   |            |    |  |
|----|------|---------|-------|----------------------------|--------|---|---|---|------------|----|--|
| 24 | Sra. | terere  | teate | admin@qa.dizbanana.pt      | --     | ✓ | ✓ | ✗ | 03/19/2016 | -- |  |
| 23 | Sra. | Farinha | Carla | miguelix.android@gmail.com | 0,00 € | ✓ | ✓ | ✗ | 03/12/2016 | -- |  |

Scroll down to PHC FX box

CUSTOMER INTEGRATION WITH PRESTA PT INVOICE

176191445   Luis Abreu   Luis Abreu Abreu   Rua do til 19,

Select address to be integrated with PHCFX – The Vat Number is recorded in the address information, be sure to select the correct address.

CUSTOMER INTEGRATION WITH PRESTA PT INVOICE

176191445   Luis Abreu   Luis Abreu Abreu   Rua do til 19,

Click “Send to PT Invoice”

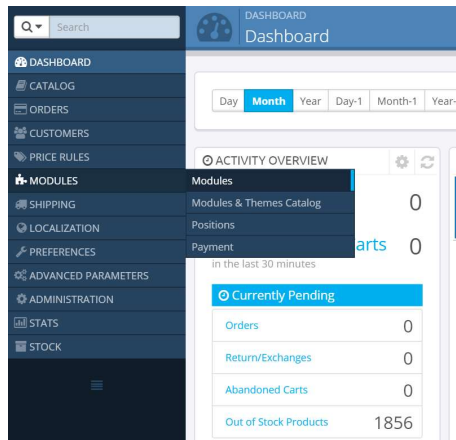
## ACTIVATE ORDERS INTEGRATION

You can choose to have your orders integrated with Presta PT Invoice, when integrated every time a customer creates an order in the front office a draft billing document is created in Presta PT Invoice

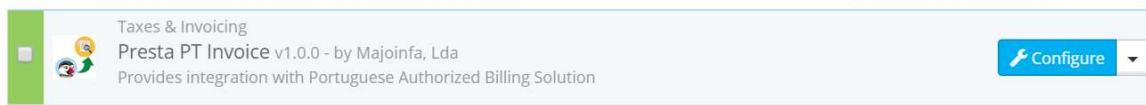
Login to your back office

# USING PRESTA PT INVOICE - ENU

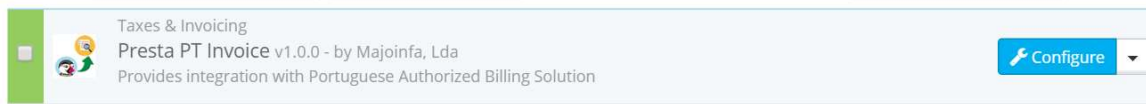
Menu Modules -> Modules



Search for Presta PT Invoice



Click "Configure"



Enable Orders Integration

Orders:

Enable/disable synchronization: ☒ Yes ☐ No

- Enable order integration and everytime you create a order in back-office or your customer creates a order in front-office the billing document will be created in KeyInvoice.

Choose the billing document that will be created in PHC FX

Default Document Type:

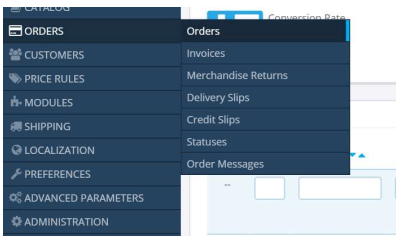
Factura

# USING PRESTA PT INVOICE - ENU

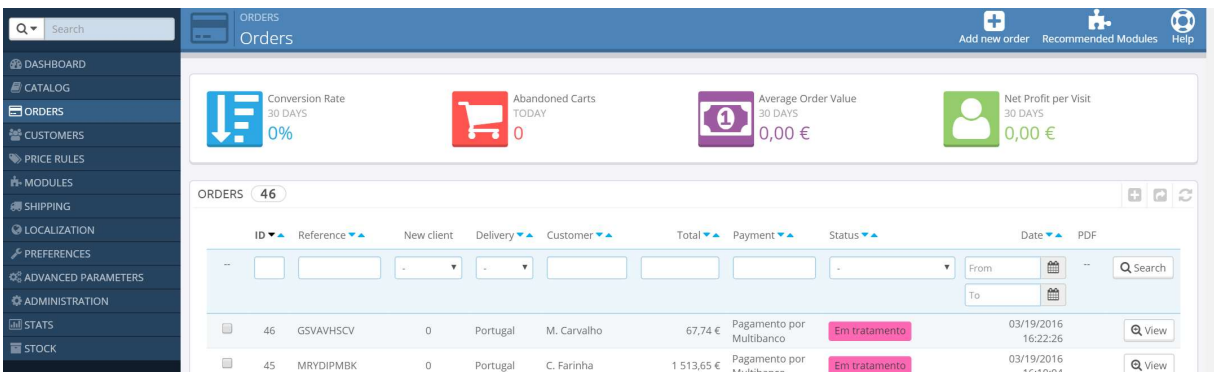
## MANUAL BILLING DOCUMENT CREATION

If needed you can create a billing document in PHC FX on demand.

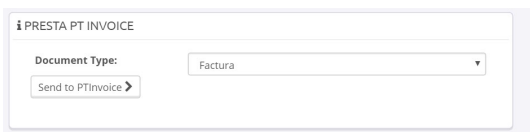
Access Orders List: Orders -> Orders



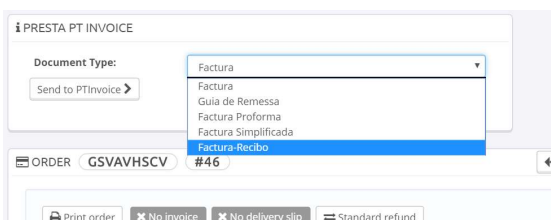
## Choose an Order



## Scroll down to PrestaPTInvoice box



## Select the document type that will be created in Presta PT Invoice



# USING PRESTA PT INVOICE - ENU

Click "Send to PTInvoice"



The screenshot shows a web interface for 'PRESTA PT INVOICE'. It features a 'Document Type:' label followed by a dropdown menu currently displaying 'Factura-Recibo'. Below the dropdown is a blue button with the text 'Send to PTInvoice' and a right-pointing arrow.



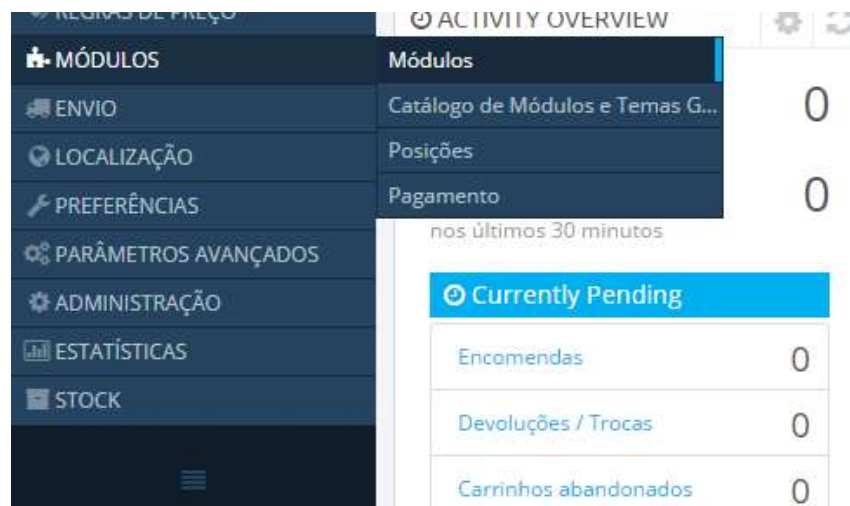
# INSTALAÇÃO PT

## Instalação PT

### ACEDER AOS MÓDULOS

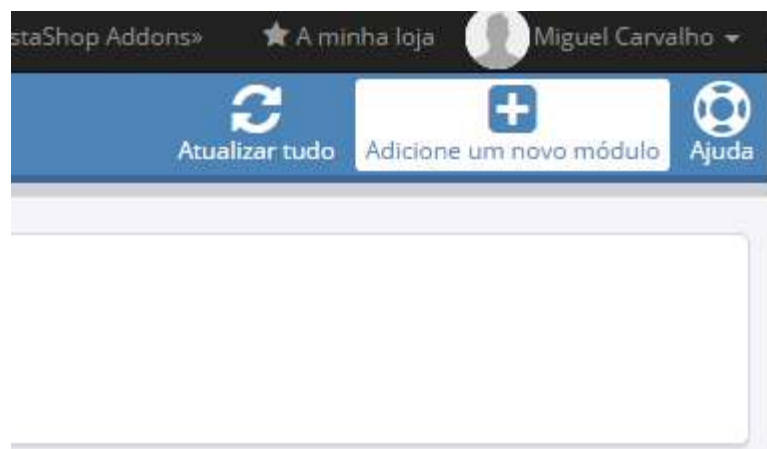
Faça login no back office da loja

Menu Módulos -> Módulos



### CARREGAR O MÓDULO PRESTA PT INVOICE

Adicione um módulo



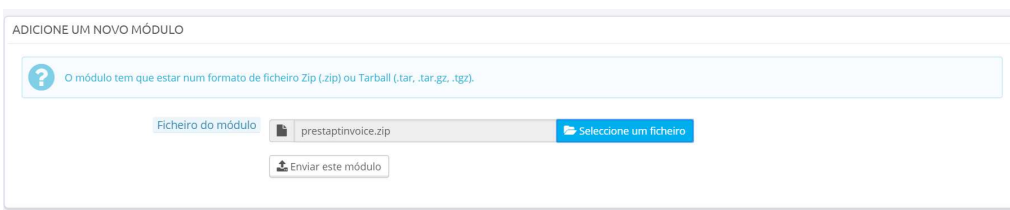
# INSTALAÇÃO PT

Escolha o ficheiro do módulo que está no seu computador



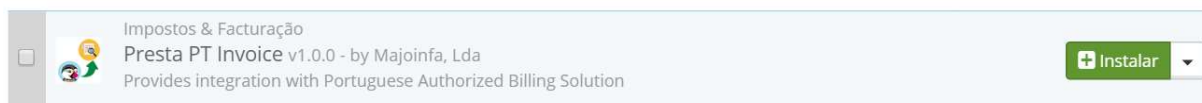
The screenshot shows the 'Upload module' interface in PrestaShop. At the top, a light blue box contains a question mark icon and the text: 'O módulo tem que estar num formato de ficheiro Zip (.zip) ou Tarball (.tar, .tar.gz, .tgz)'. Below this, there is a label 'Ficheiro do módulo' next to a file input field. The input field contains a file icon and the text 'Selecione um ficheiro'. Below the input field is a button labeled 'Enviar este módulo'.

Transporte o modulo para a loja – clique em “Enviar este módulo”



This screenshot shows the same 'Upload module' interface, but now a file named 'prestaptinvoice.zip' has been selected in the file input field. The 'Enviar este módulo' button is still visible below the input field.

Instalar o módulo – Clique Instalar



The screenshot shows a module card for 'Impostos & Facturação Presta PT Invoice v1.0.0 - by Majoinfa, Lda'. The card includes a checkbox on the left, a small icon, and the text 'Provides integration with Portuguese Authorized Billing Solution'. On the right side of the card, there is a green button with a plus icon and the text 'Instalar', followed by a dropdown arrow.

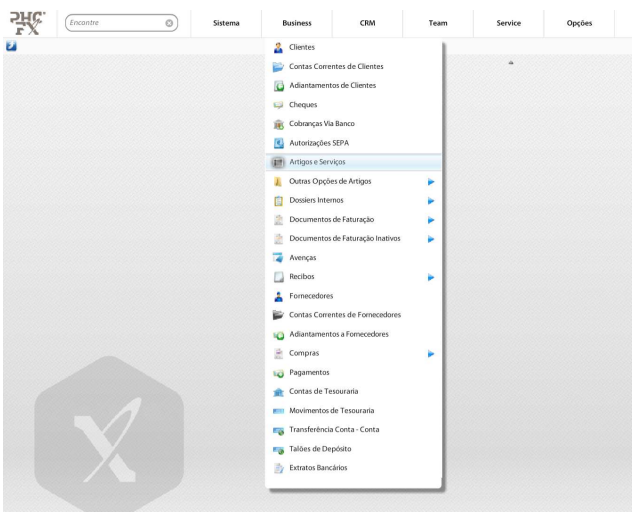
## CRIAR UM SERVIÇO DE ENVIO

Antes de utilizar o Presta PT Invoice tem que criar um serviço no PHC FX que vai ser usado pelo módulo para cobrar as despesas de envio do Prestashop

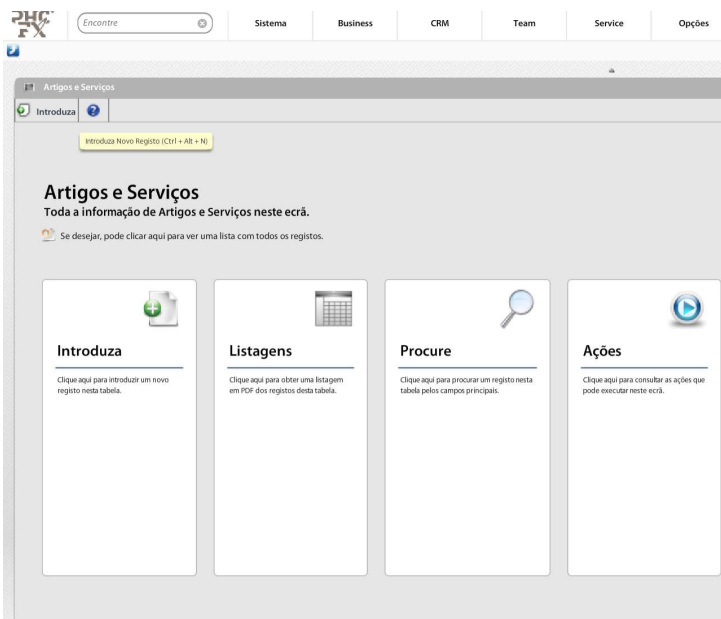
Aceder ao PHC FX

Access “Business” -> “Artigos e Serviços”

# INSTALAÇÃO PT

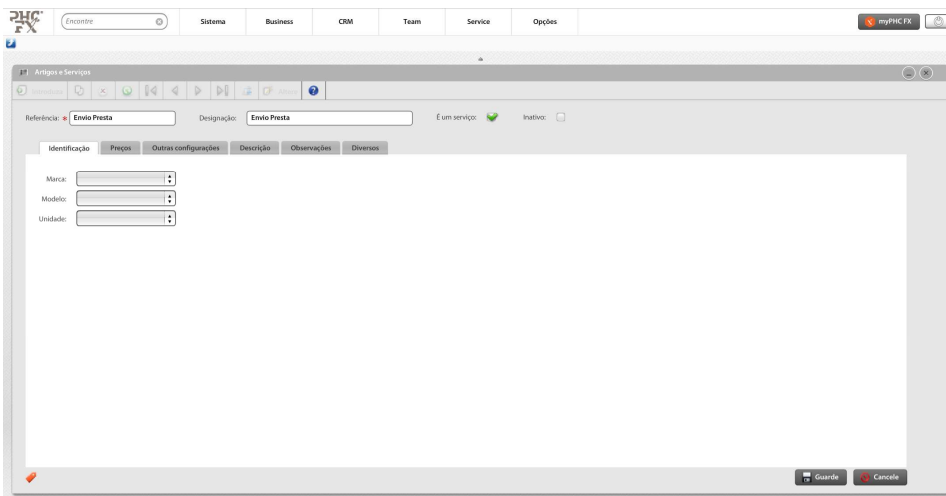


Click "Introduza"

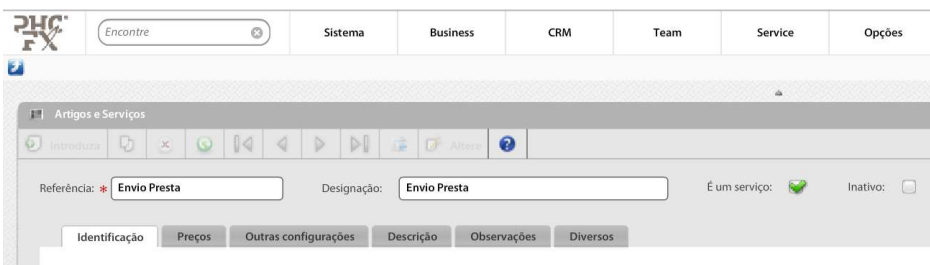


Preencha os dados do artigo

# INSTALAÇÃO PT



Copie a “Referência \*” que criou para o Notepad



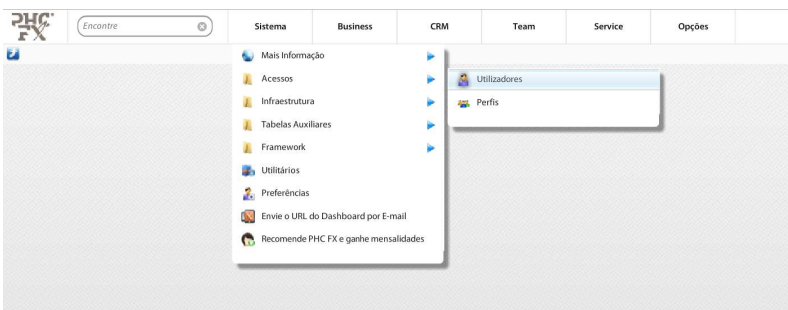
## CRIAR O UTILIZADOR DE INTEGRAÇÃO

Antes de usar o Presta PT Invoice tem de criar um utilizador no PHC FX que vai ser usado pela loja Prestashop para se ligar ao PHC FX

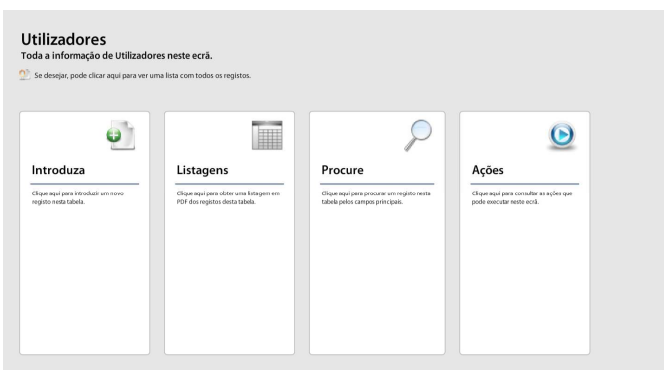
Aceder PHC FX

Aceder “Sistema” -> “Acessos” -> “Utilizadores”

# INSTALAÇÃO PT



Click “Introduza”



Preencha os dados do utilizador e carregue em “Guarde”

Copie o “Nome para login” para o notepad conjuntamente com a password criada no processo de ativação.

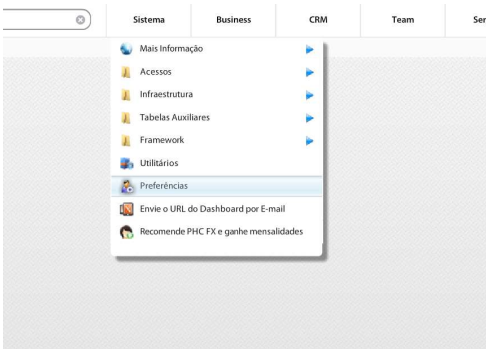
# INSTALAÇÃO PT

## OBTER A REFERÊNCIA DA BASE DE DADOS

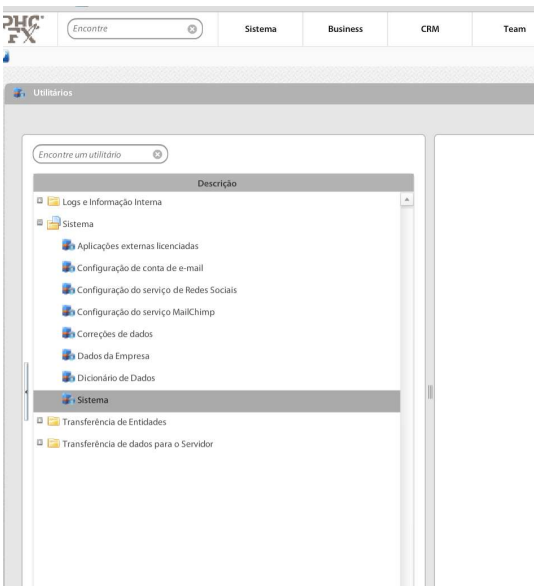
Antes de usar o Presta PT Invoice deve obter a informação da base de dados da “Empresa”

Aceder PHC FX

Aceder “Sistema” -> “Preferências”

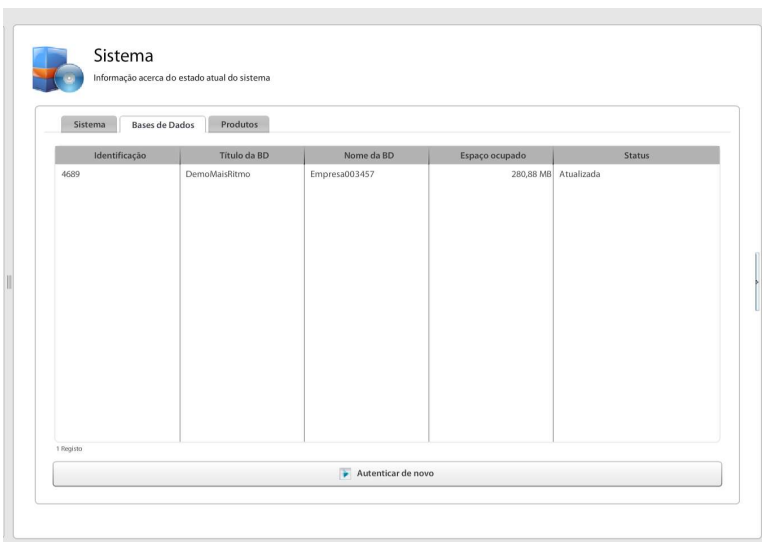


Aceder Sistema -> Sistema



Aceder ao divisor “Base de Dados” e copie o valor da coluna “Nome da BD”. Neste exmplo é o valor “Empresa003457”

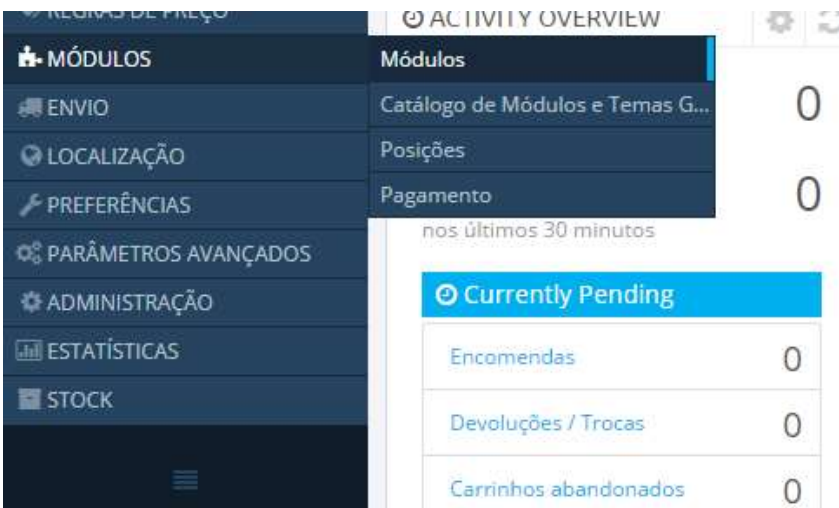
# INSTALAÇÃO PT



## CONFIGURAR O MÓDULO

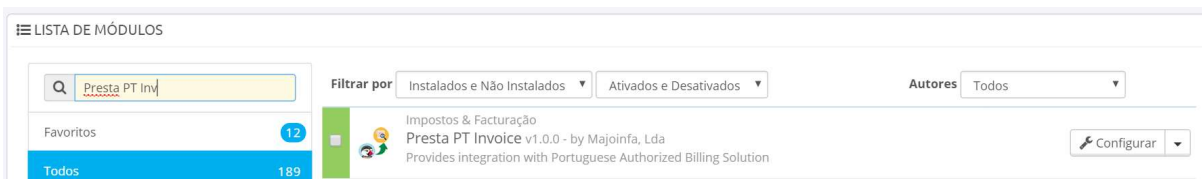
Faça login no back office da loja

Menu Módulos -> Módulos



Localize o módulo Presta PT Invoice

# INSTALAÇÃO PT



Clique em “Configurar”



Preencha a seguinte informação:

URL - > O URL para aceder ao PHCFX

Username -> O nome do utilizador copiado para o notepad

Password - > A palavra passe do Username

appID - > E51748483C

Company - > O nome da “Base de Dados”

CONFIGURAÇÃO

Session Config:

url: http://sis03.phcfx.com/D3244444

username: INTEGRACAO

password: .....

appID: E51748483C

company: Empresa0099999

Carregue “Guardar”



# INSTALAÇÃO PT

## Encomendas:

Ativar / Desativar sincronização:  Sim  Não

- Ativar integração com PTInvoice e sempre que um cliente faz uma encomenda o documento de faturação é criado no PTInvoice.

## Tipo de Documento Padrão:

Factura ▼

## Configurações Gerais:

### Referência do Envio:

Shipping Cost Mapper

- Tem que criar um produto no PHC FX para "Custos de Envio". Grave aqui a referência desse produto

Guardar ➤

Copiar a referência do serviço de envio para “Referência do Envio” e carregue em carregar novamente.

## Configurações Gerais:

### Referência do Envio:

Envio Presta

- Tem que criar um produto no PHC FX para "Custos de Envio". Grave aqui a referência desse produto

Guardar ➤

# UTILIZAÇÃO DO PRESTA PT INVOICE - PT

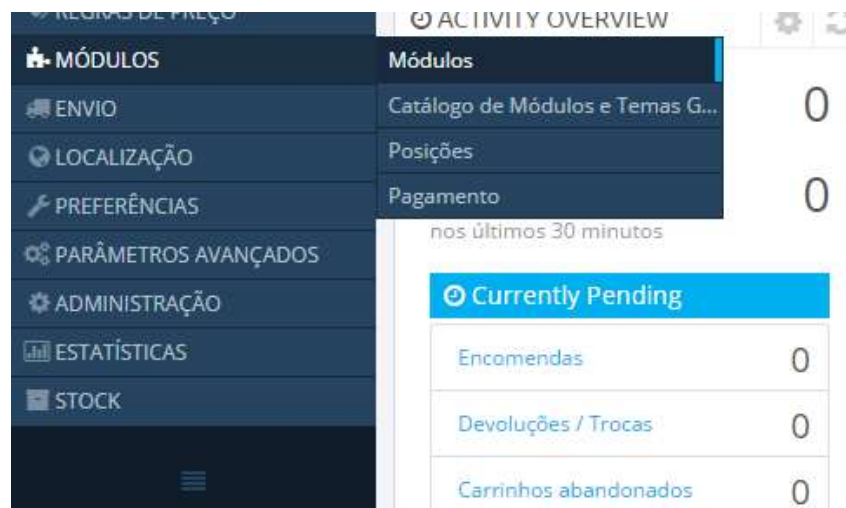
## Utilização do Presta PT Invoice - PT

### INTEGRAÇÃO DOS PRODUTOS NO PHCFX

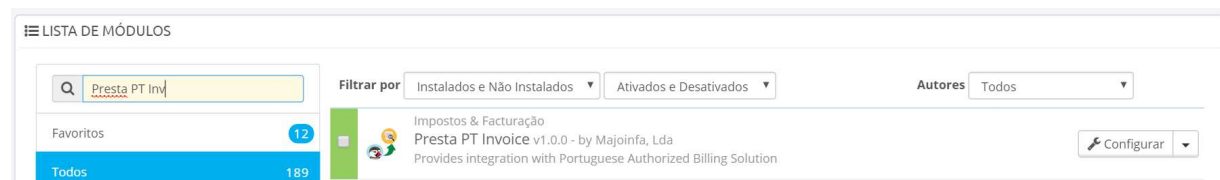
Pode optar por ter os produtos integrados no PHCFX, quando esta opção está ativada sempre que grava um produto ele é criado ou atualizado no PHCFX.

Faça login no back office da loja

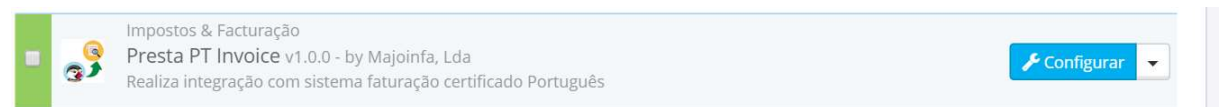
Menu Módulos -> Módulos



Localize o modulo Presta PT Invoice



Clique em “Configurar”



# UTILIZAÇÃO DO PRESTA PT INVOICE - PT

Ative sincronização de produtos escolhendo a opção “Sim”

Produtos:

Ativar / Desativar sincronização.:   Sim  Não

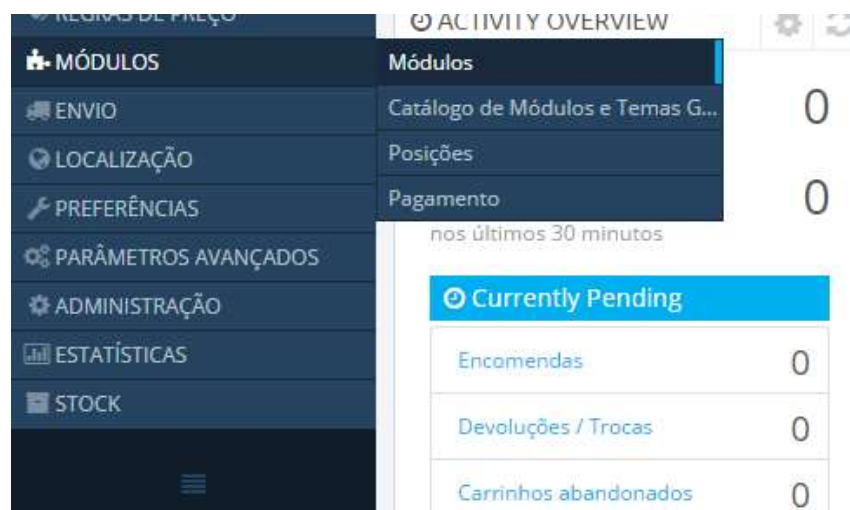
- Ativar integração com PTInvoice e sempre que grava um produto ele é criado no PTInvoice

## ATIVAR INTEGRAÇÃO DE CLIENTES

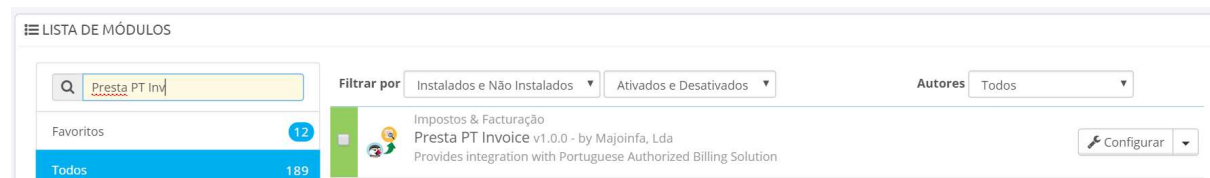
Pode optar por ativar a integração de clientes com o PHC FX, com esta opção sempre que um cliente se regista na loja online o cliente é criado ou atualizado automaticamente no PHC FX

Faça login no back office da loja

Menu Módulos -> Módulos



Localize o módulo Presta PT Invoice



Clique em “Configurar”

# UTILIZAÇÃO DO PRESTA PT INVOICE - PT



Impostos & Faturação

Presta PT Invoice v1.0.0 - by Majoinfa, Lda

Realiza integração com sistema faturação certificado Português



## Ativar a Integração de Clientes

Clientes:

Ativar / Desativar sincronização.: ☒ Sim ☐ Não

- Ativar integração com PTInvoice e sempre que grava informação de um cliente ela é atualizada no PTInvoice.

## CRIAÇÃO MANUAL DE CLIENTES

Sempre que for necessário pode criar ou atualizar manualmente um cliente no PHC FX a partir da loja online Prestashop

Aceder à lista de clientes: Clientes -> Clientes

**CLIENTES**

REGRAS DE PREÇO

MÓDULOS

ENVIO

LOCALIZAÇÃO





PREFERÊNCIAS

PARÂMETROS AVANÇADOS

ADMINISTRAÇÃO

**Clientes**  
Endereços  
Grupos  
Carrinhos de Compras  
Serviço ao cliente  
Contactos  
Títulos  
Newsletter Pro

## Selecionar um cliente

|   |    |      |        |       |                       |    |   |   |   |            |    |
|---|----|------|--------|-------|-----------------------|----|---|---|---|------------|----|
|  | 24 | Sra. | terere | teate | admin@qa.dizbanana.pt | -- |  |  |  | 2016-03-19 | -- |
|---|----|------|--------|-------|-----------------------|----|---|---|---|------------|----|

Localizar a caixa "INTEGRAÇÃO DE CLIENTES COM PRESTA PT INVOICE"

# UTILIZAÇÃO DO PRESTA PT INVOICE - PT

INTEGRAÇÃO DE CLIENTES COM PRESTA PT INVOICE

|           |                |                   |                                  |
|-----------|----------------|-------------------|----------------------------------|
| 141130326 | Maria Carvalho | Rua da faturacao, | <input checked="" type="radio"/> |
| 141130326 | Carla Farinha  | Rua da Entrega,   | <input type="radio"/>            |

Enviar para PT Invoice ➤

Selecionar o endereço a ser integrado no PHCFX – No Prestashop o NIF é guardado no endereço do cliente, verifique qual o endereço a integrar.

INTEGRAÇÃO DE CLIENTES COM PRESTA PT INVOICE

|           |                |                   |                                  |
|-----------|----------------|-------------------|----------------------------------|
| 141130326 | Maria Carvalho | Rua da faturacao, | <input checked="" type="radio"/> |
| 141130326 | Carla Farinha  | Rua da Entrega,   | <input type="radio"/>            |

Enviar para PT Invoice ➤

Clique em “Enviar para PT Invoice”

## ATIVAR INTEGRAÇÃO DE ENCOMENDAS

Pode optar por integrar as encomendas no PHC FX, quando esta opção está ativa as encomendas geradas por clientes na loja online geram um rascunho de documento fiscal no PHC FX com todo o detalhe.

Faça login no back office da loja

Menu Módulos -> Módulos

REGIÃO DE PREÇO

MÓDULOS

ENVIO

LOCALIZAÇÃO

PREFERÊNCIAS

PARÂMETROS AVANÇADOS

ADMINISTRAÇÃO

ESTATÍSTICAS

STOCK

ACTIVITY OVERVIEW

Módulos

Catálogo de Módulos e Temas G...

Posições

Pagamento

0

0

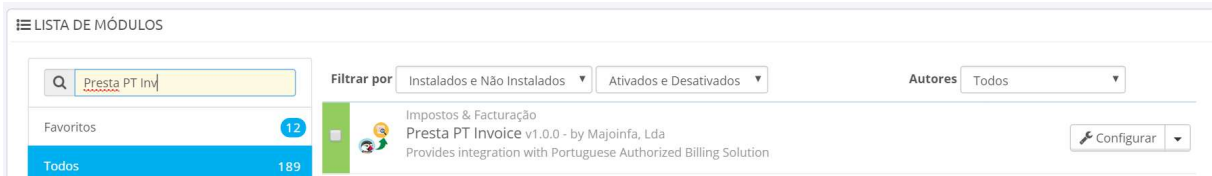
nos últimos 30 minutos

Currently Pending

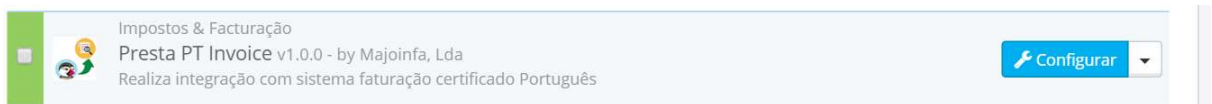
|                       |   |
|-----------------------|---|
| Encomendas            | 0 |
| Devoluções / Trocas   | 0 |
| Carrinhos abandonados | 0 |

# UTILIZAÇÃO DO PRESTA PT INVOICE - PT

Localize o módulo Presta PT Invoice



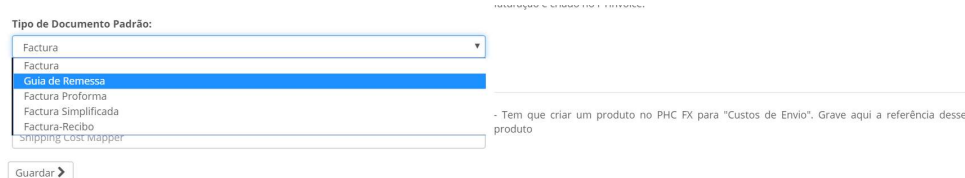
Clique em “Configurar”



Ative a integração de encomendas



Escolha qual o tipo de documento fiscal vai ser criado no PHC FX

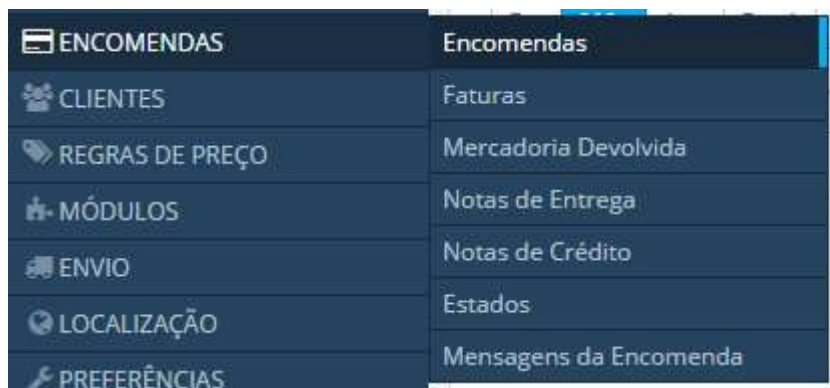


## CRIAÇÃO MANUAL DE UMA ENCOMENDA

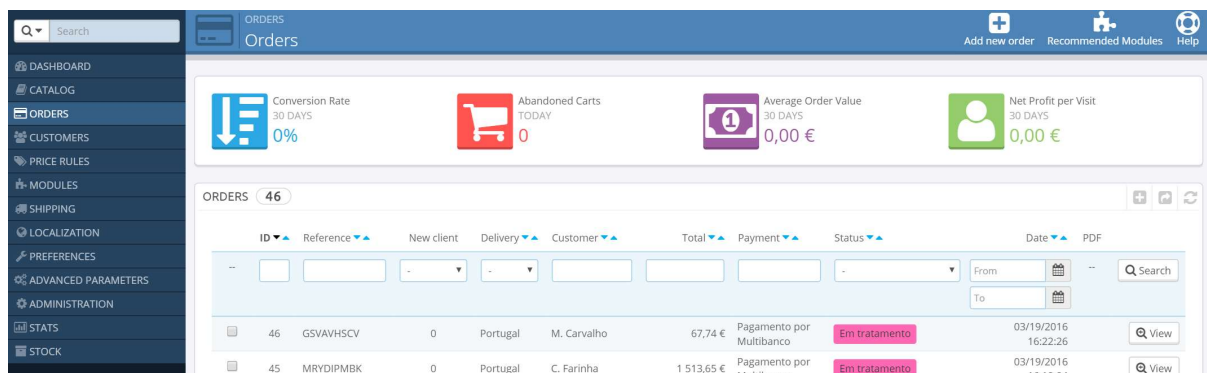
Sempre que for necessário pode gerar manualmente um documento fiscal no PHC FX a partir de uma encomenda do Prestashop

Aceder à lista de encomendas: Encomendas -> Encomendas

# UTILIZAÇÃO DO PRESTA PT INVOICE - PT



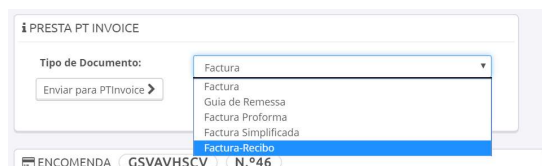
Escolha uma encomenda



Localize a caixa do Presta PT Invoice



Escolha qual o documento fiscal que vai ser criado no PHC FX



# UTILIZAÇÃO DO PRESTA PT INVOICE - PT

Clique em “Enviar para PTInvoice”



The screenshot shows a web interface for 'PRESTA PT INVOICE'. At the top, there is a header with an information icon and the text 'PRESTA PT INVOICE'. Below this, there is a section labeled 'Tipo de Documento:'. To the right of this label is a dropdown menu currently displaying 'Factura'. Below the dropdown menu is a blue button with the text 'Enviar para PTInvoice' followed by a right-pointing arrow.