

PRESTA PT INVOICE MANUAL

VERSION V1.0.0.0

DATE 2016



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

TABLE OF CONTENTS

Contents

Installation ENU_____	1
Using Presta PT Invoice - ENU _____	9

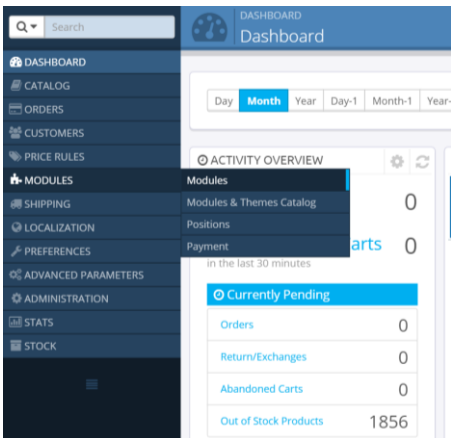
INSTALLATION ENU

Installation ENU

ACCESS MODULES MANAGEMENT

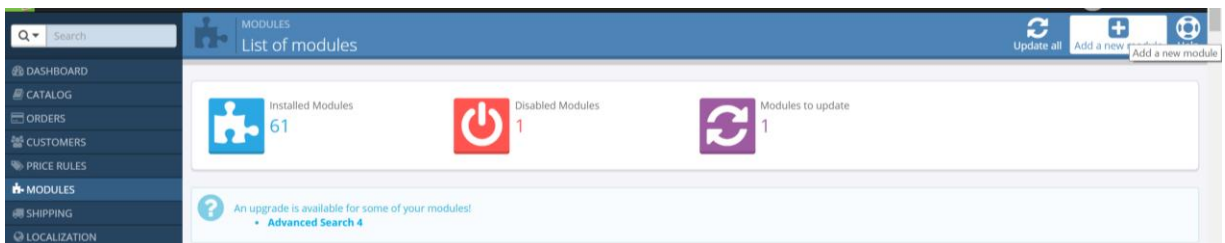
Login to your back office

Menu Modules -> Modules

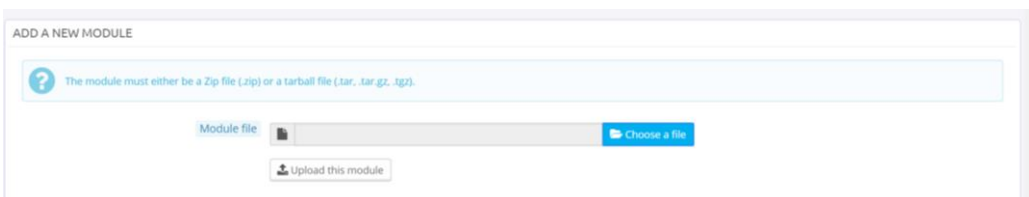


UPLOAD PRESTA PT INVOICE MODULE

Add new module

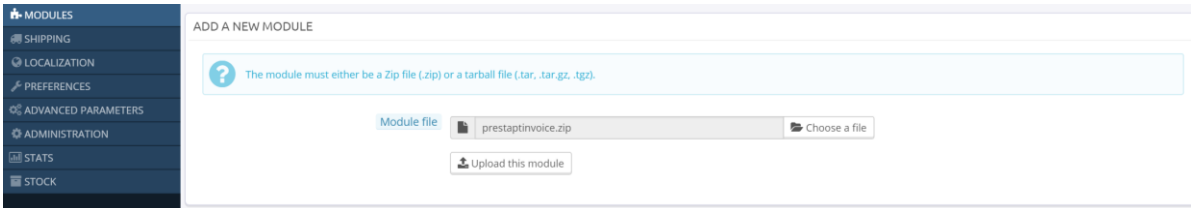


Locate file in your computer - Choose a file

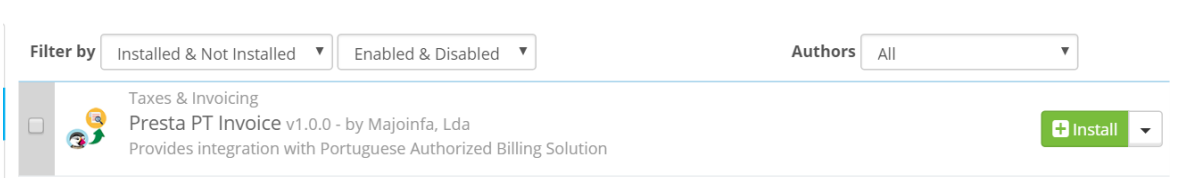


INSTALLATION ENU

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



Install the module – Press Install

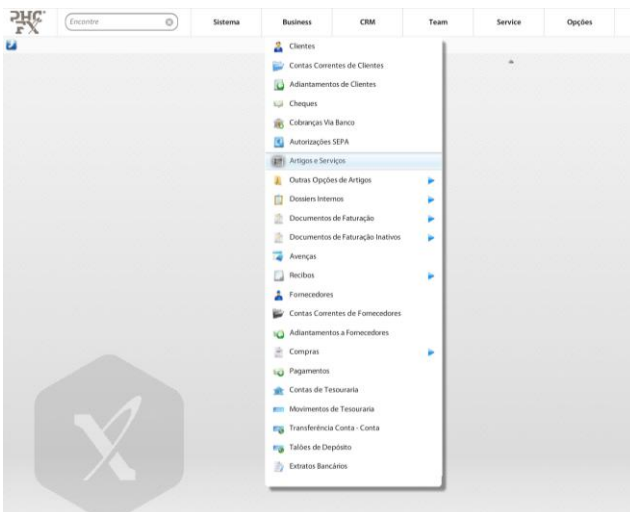


CREATE SHIPPING SERVICE

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

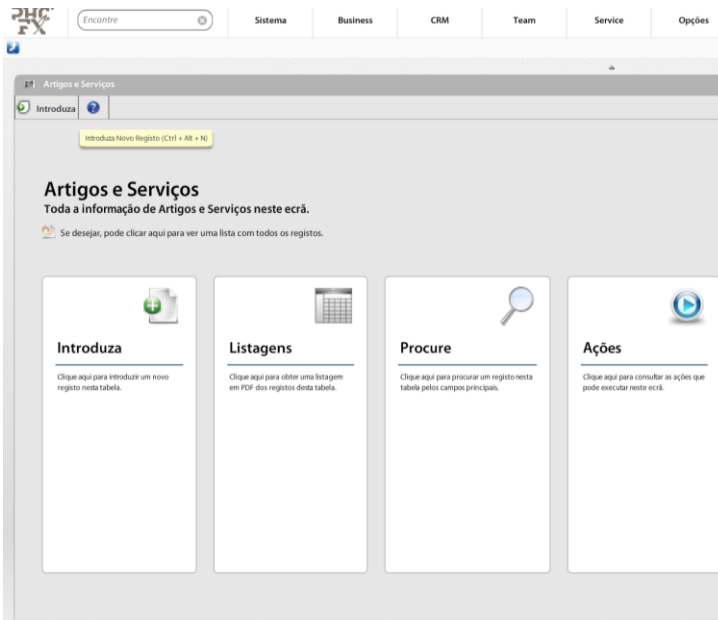
Access PHC FX

Access “Business” -> “Artigos e Serviços”

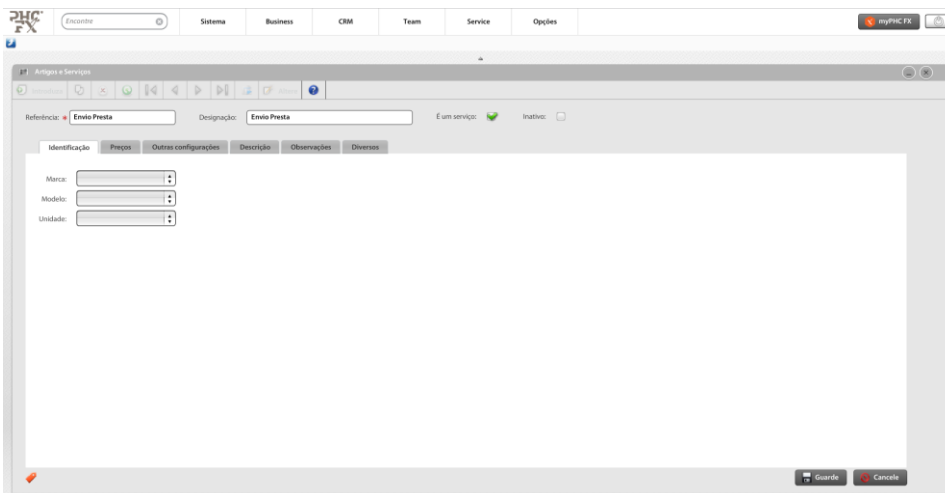


INSTALLATION ENU

Click “Introduza”

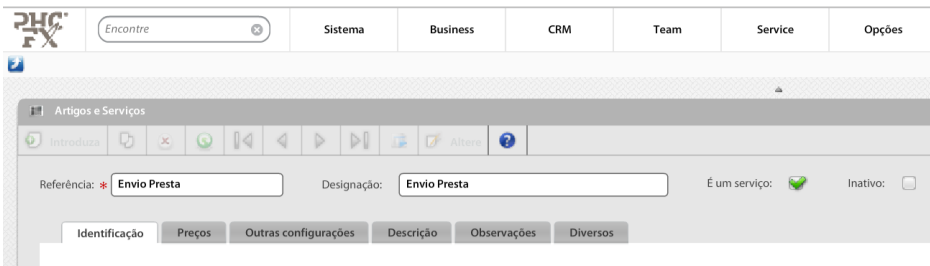


Fulfill the form.



Copy the “Referência *” that you created to Notepad

INSTALLATION ENU

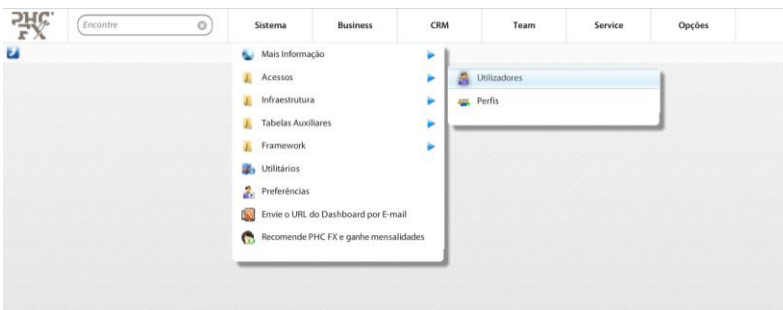


CREATE INTEGRATION USER

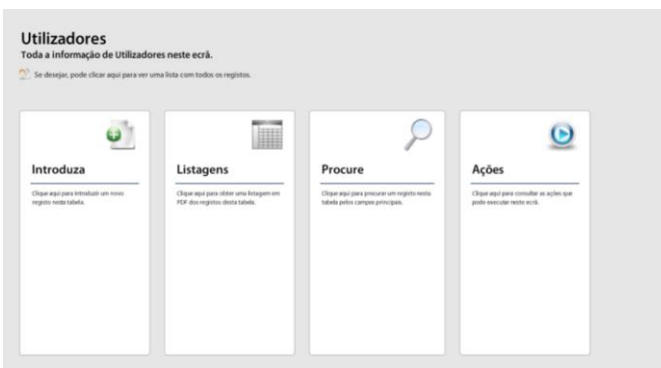
Before using the Presta PT Invoice you must create a user in PHC FX that will be used to Prestashop access PHC FX

Access PHC FX

Access “Sistema” -> “Acessos” -> “Utilizadores”



Click “Introduza”



INSTALLATION ENU

Fulfill the form and press “Guarde”

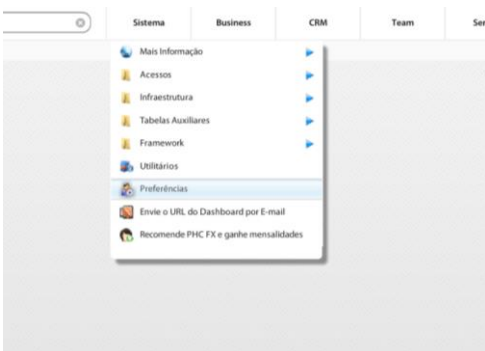
Copy the “Nome para login” to your notepad and the password created with activation process.

GET DATABASE REFERENCE

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

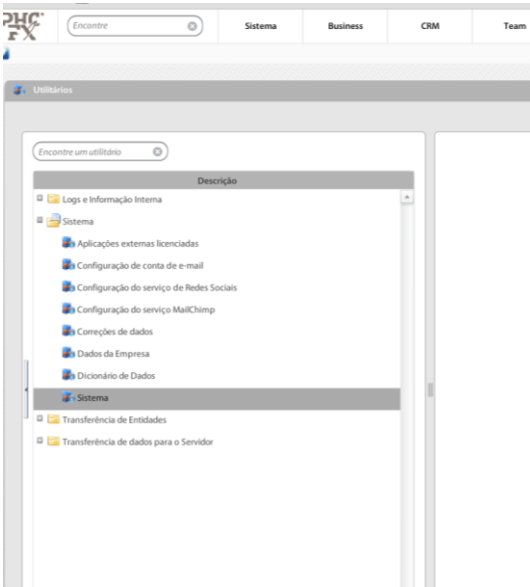
Access PHC FX

Access “Sistema” -> “Preferências”

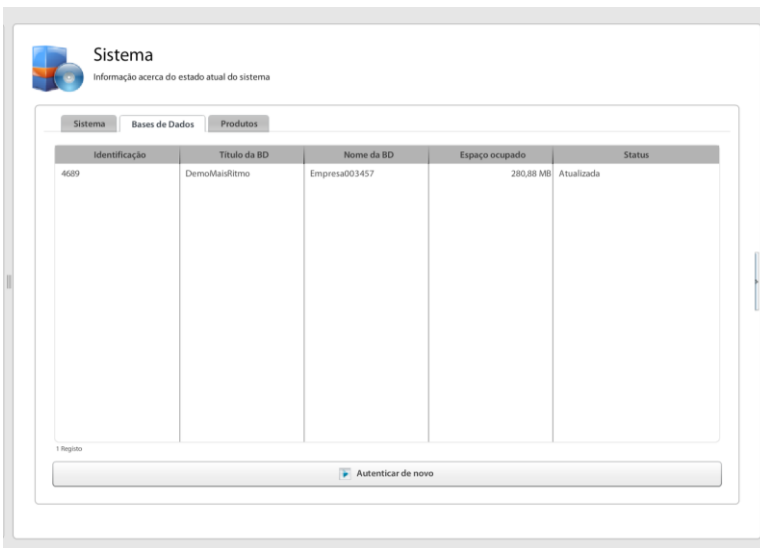


Access Sistema -> Sistema

INSTALLATION ENU



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

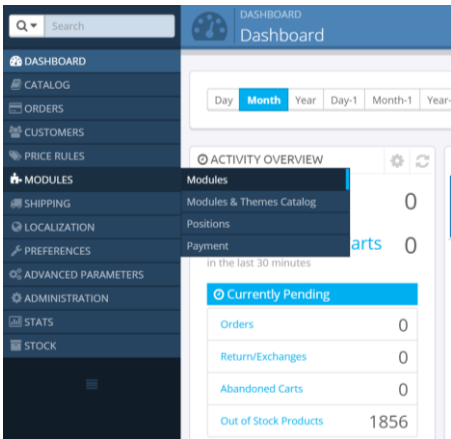


CONFIGURE MODULE

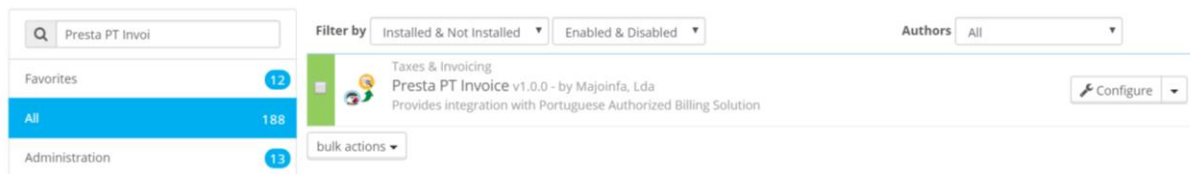
Login to your back office

Access Menu Modules -> Modules

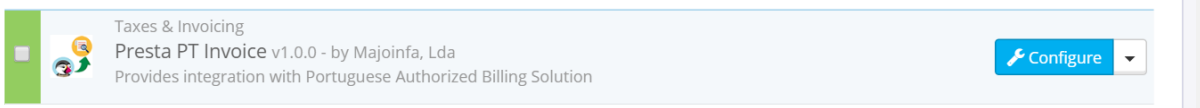
INSTALLATION ENU



Search for Presta PT Invoice



Click “Configure”



Fulfill the following information:

URL - > The URL for accessing your PHCFX

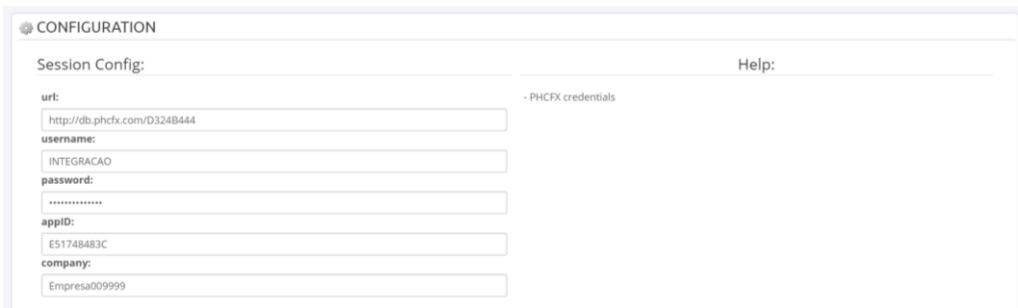
Username -> The username previously pasted to your notepad

Password - > Username password

appID - > E51748483C

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

INSTALLATION ENU



CONFIGURATION

Session Config:

url: - PHCTX credentials

username:

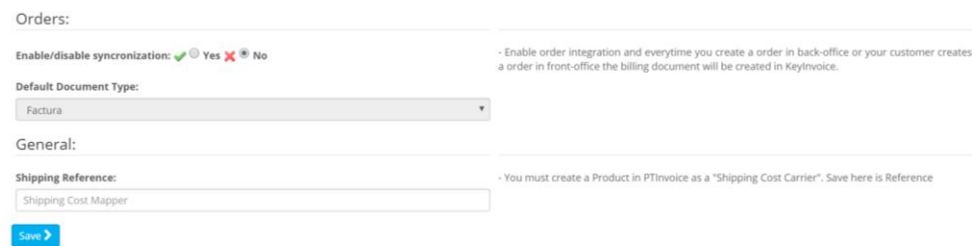
password:

appId:

company:

Help:

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.

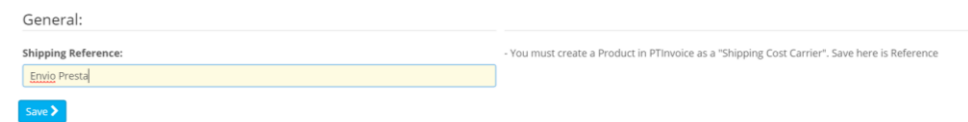
Default Document Type:

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

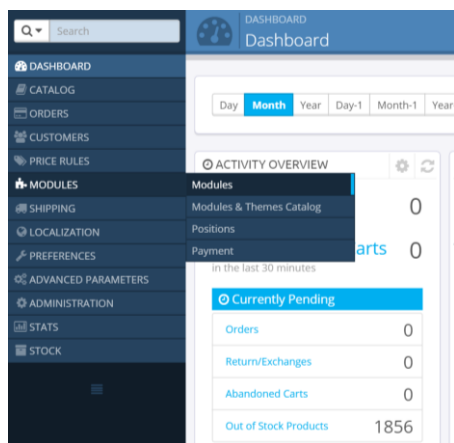
Using Presta PT Invoice - ENU

ACTIVATE PRODUCT INTEGRATION

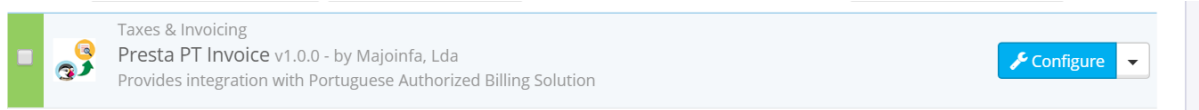
You can choose to have your products integrated with PHC FX, when integrated every time you save your product in your online Prestashop store the product will be created or updated in PHC FX

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.

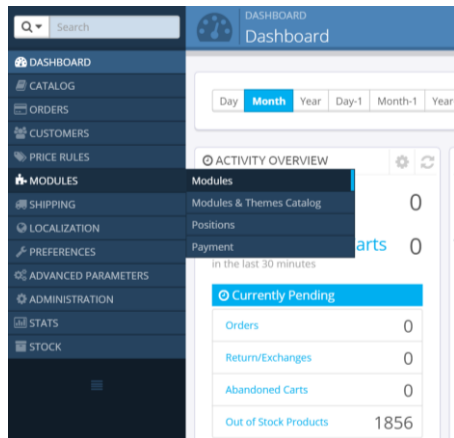
ACTIVATE CUSTOMERS INTEGRATION

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

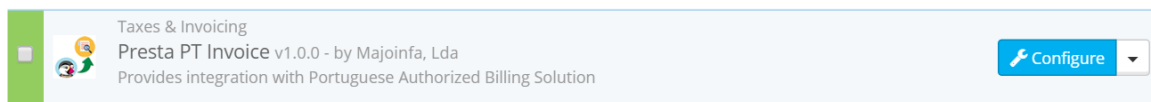
USING PRESTA PT INVOICE - ENU

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

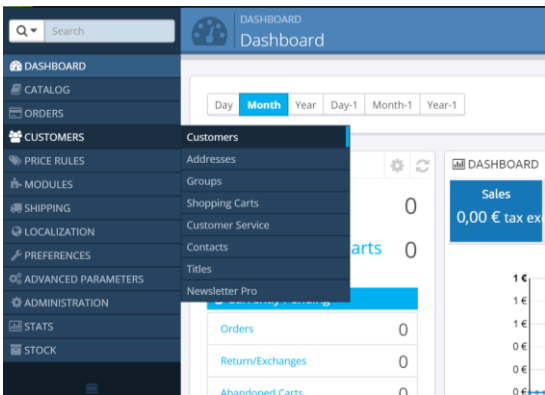
- Enable customer integration and everytime you save customer information in fron-office or back-office your customer information will be created / updated in KeyInvoice.

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”

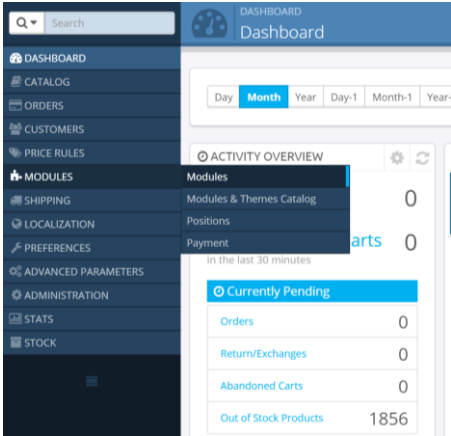
ACTIVATE ORDERS INTEGRATION

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

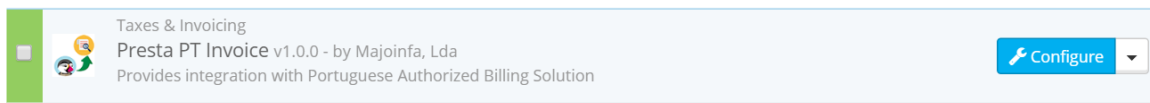
Login to your back office

USING PRESTA PT INVOICE - ENU

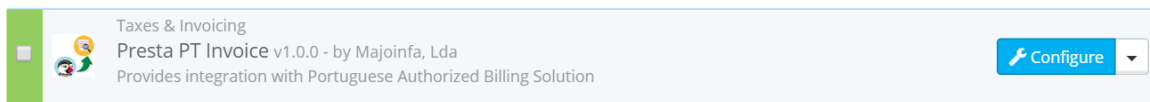
Menu Modules -> Modules



Search for Presta PT Invoice



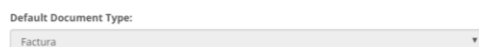
Click "Configure"



Enable Orders Integration



Choose the billing document that will be created in PHC FX

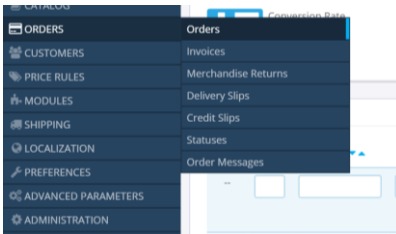


USING PRESTA PT INVOICE - ENU

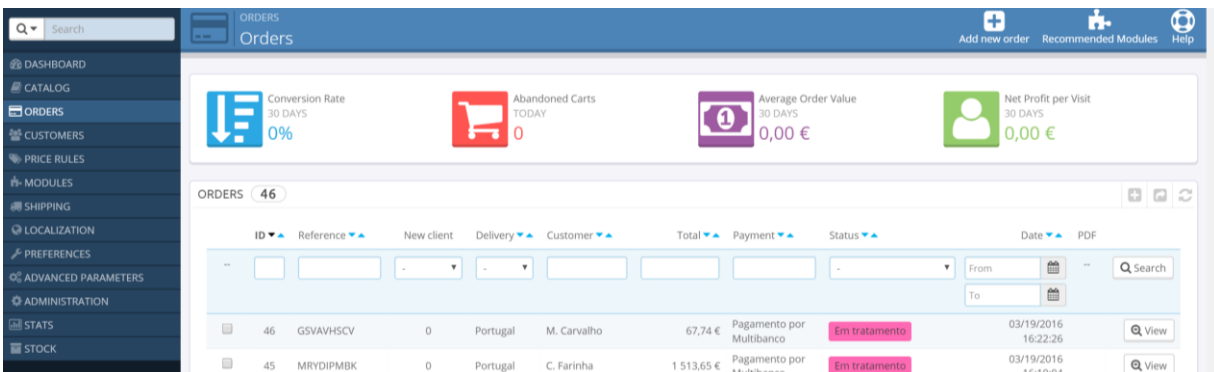
MANUAL BILLING DOCUMENT CREATION

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

Access Orders List: Orders -> Orders



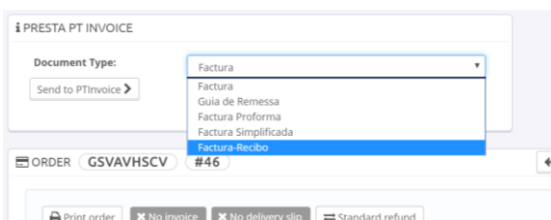
Choose an Order



Scroll down to PrestaPTInvoice box

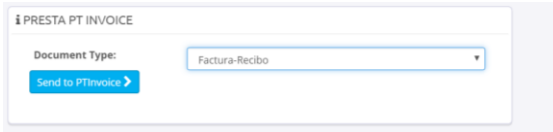


Select the document type that will be created in Presta PT Invoice



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.