CERTIFIED INVOICE GENERATOR

FOR PORTUGAL

VERSION V1.0.0.0

DATE 2016

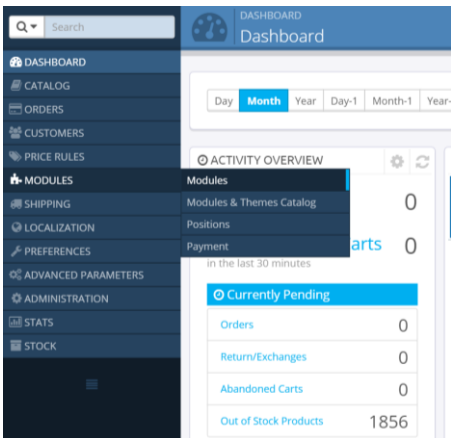*Module that integrates Prestashop with Portuguese Billing Solution – Runs with PHC FX*

Contents
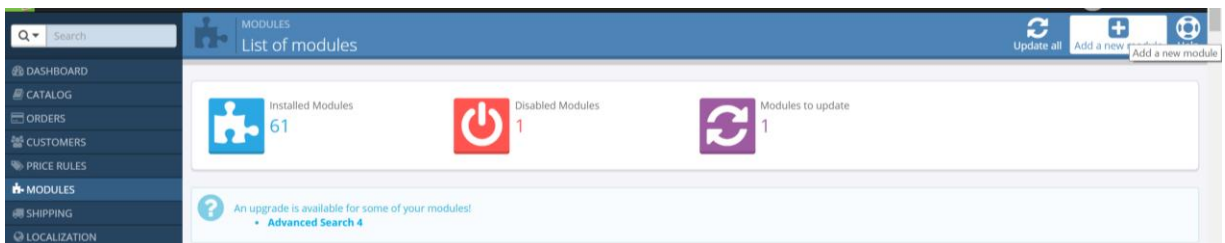
Installation ENU

ACCESS MODULES MANAGEMENT
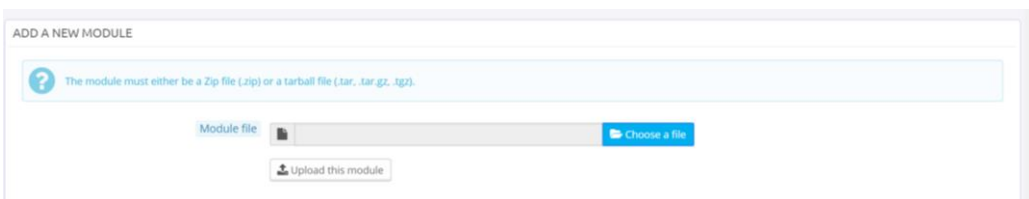
Login to your back office

Menu Modules -> Modules

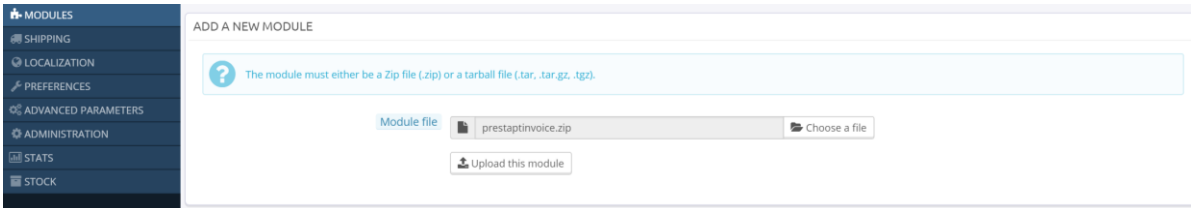## UPLOAD PRESTA PT INVOICE MODULE

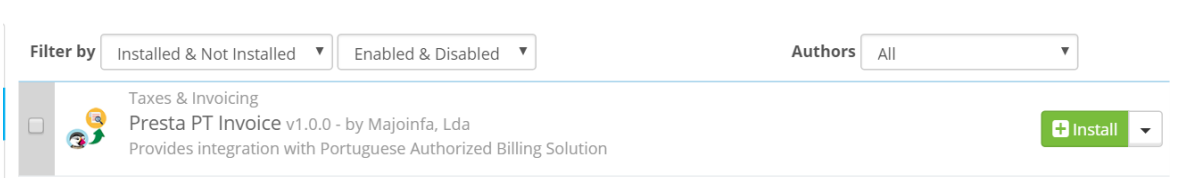Add new module

Locate file in your computer - Choose a file

Upload the module to your store – Press "Upload this module"

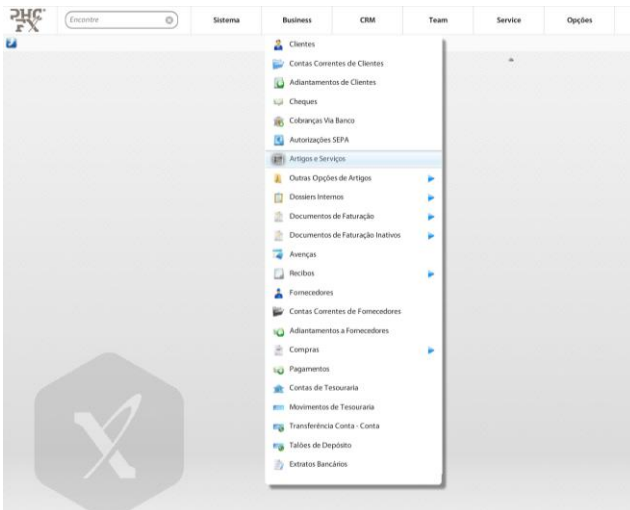Install the module – Press Install

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.
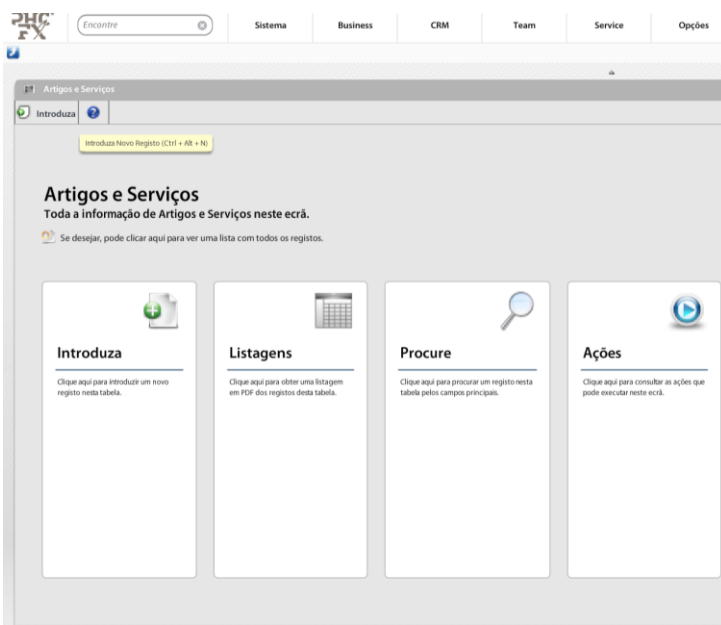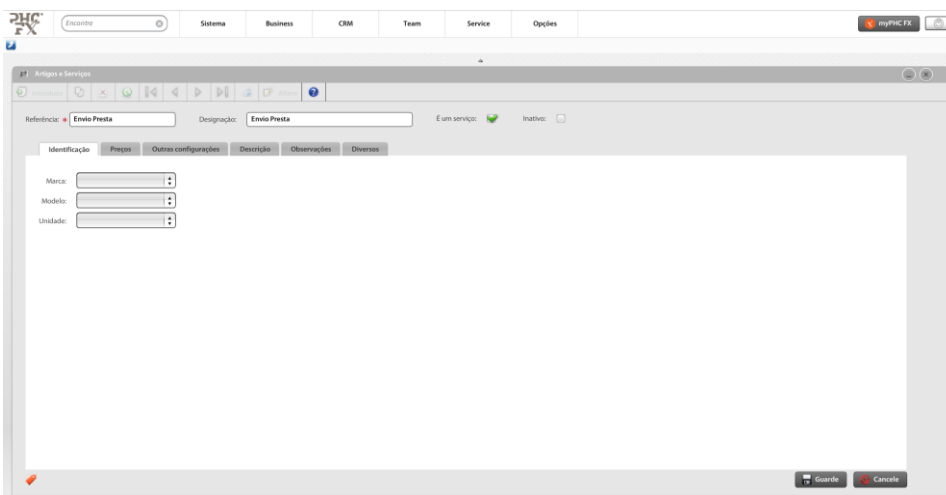
Access PHC FX

Access "Business" -> "Artigos e Serviços"
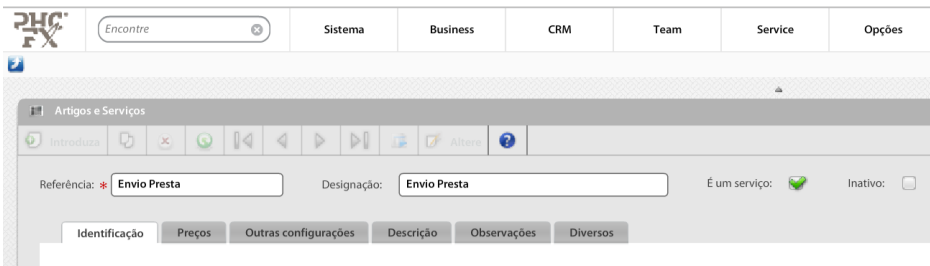
Click "Introduza"

Fulfill the form.

Copy the "Referência *" that you created to Notepad
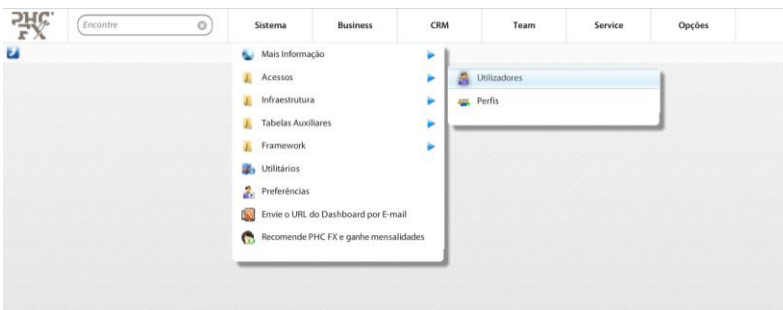
INSTALLATION ENU

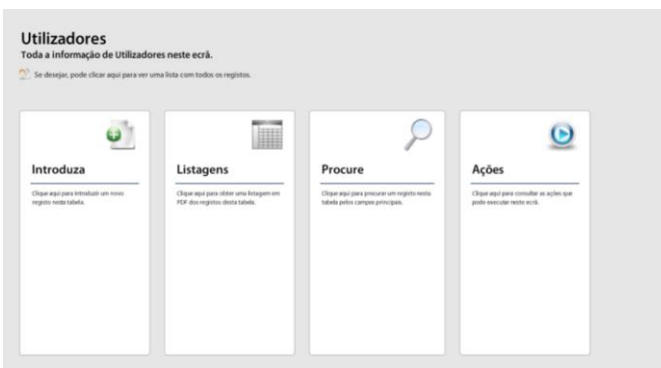
CREATE INTEGRATION USER

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

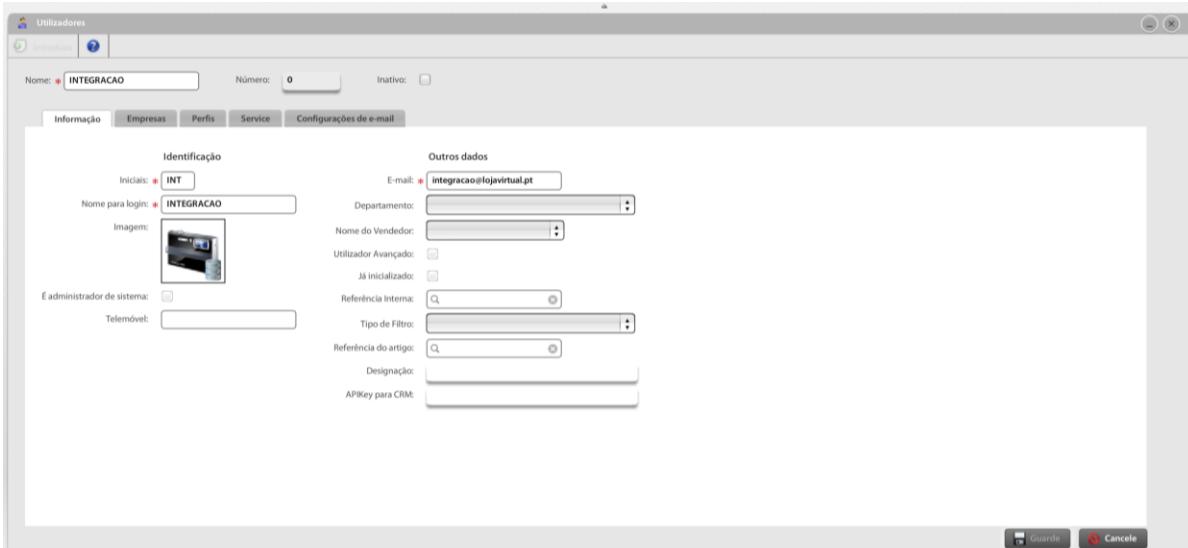Access PHC FX

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

Click "Introduza"
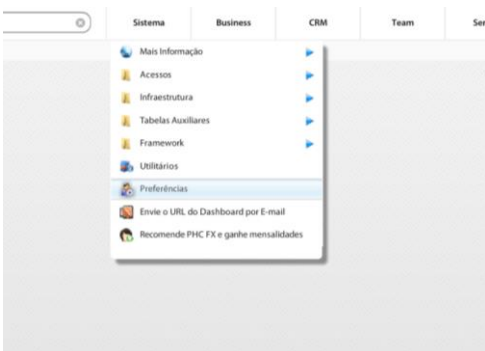
Fulfill the form and press "Guarde"

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

GET DATABASE REFERENCE

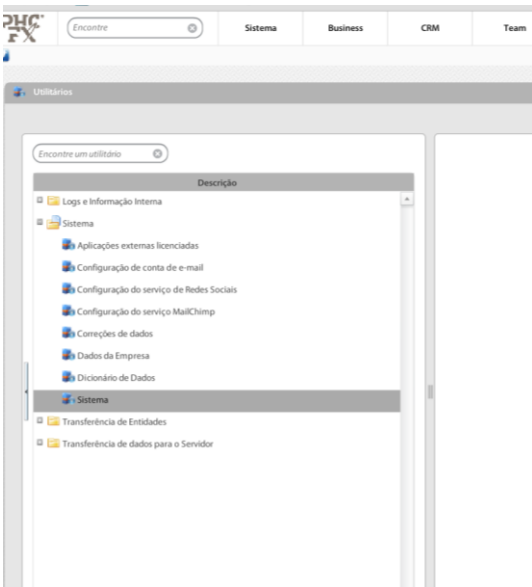Before using the Presta PT Invoice you must collect information regarding database "Empresa"
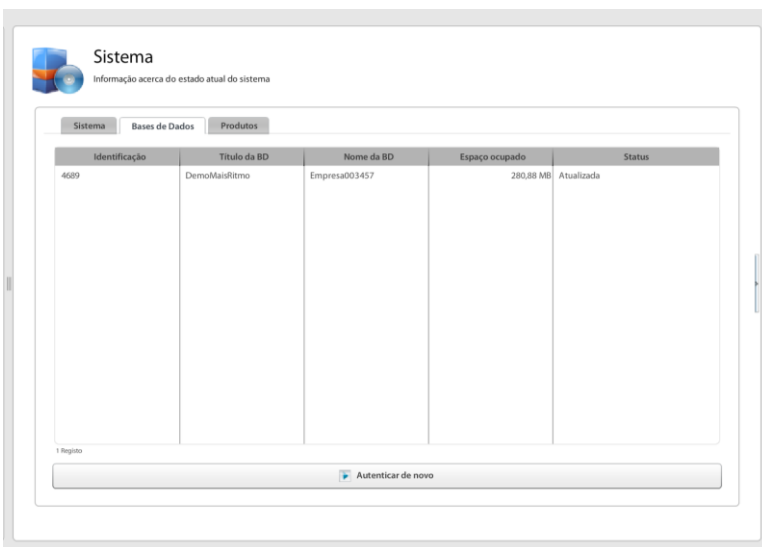
Access PHC FX

Access "Sistema" -> "Preferências"

Access Sistema -> Sistema

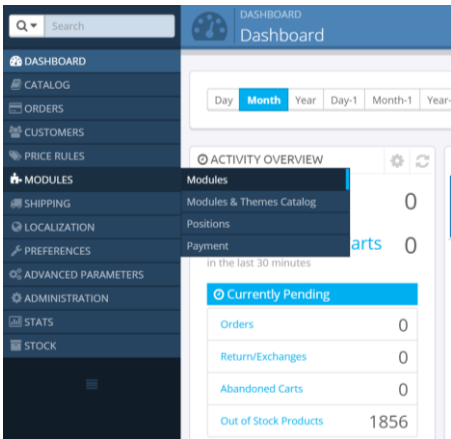Access Tab "Base de Dados" and write down the name in the "Nome da BD" column. In this example is "Empresa003457"

CONFIGURE MODULE
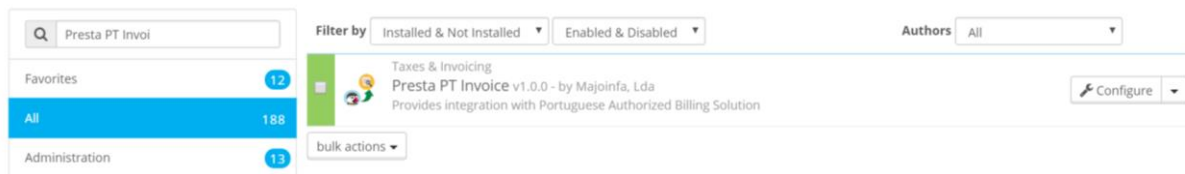
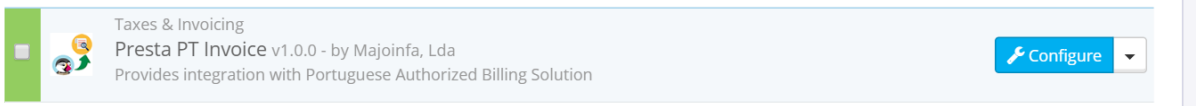Login to your back office

Access Menu Modules -> Modules

Search for Presta PT Invoice

Click "Configure"

Fulfill the following information:
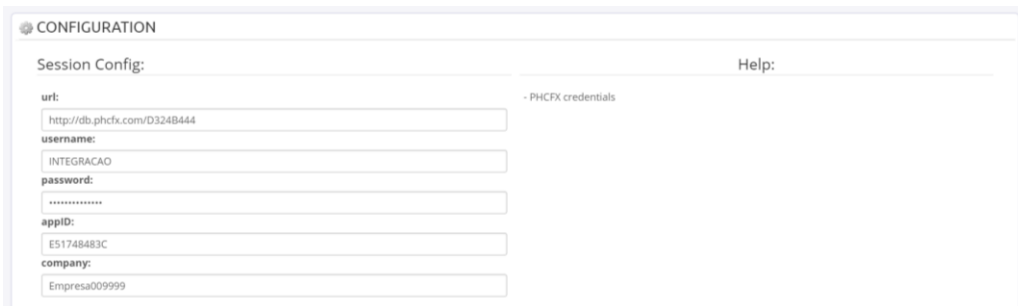
URL - > The URL for accessing your PHCFX

Username -> The username previously pasted to your notepad

Password - > Username password

appID - > E51748483C

Company - > The name of the "Base de Dados"
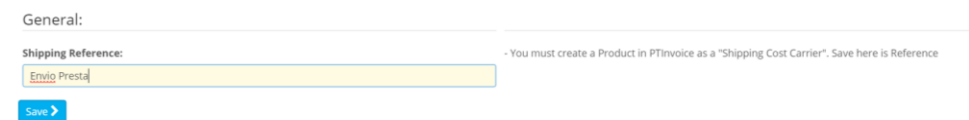
Press "Save"

Copy Shipping Service "Referência" to "Shipping Reference" field and press save again
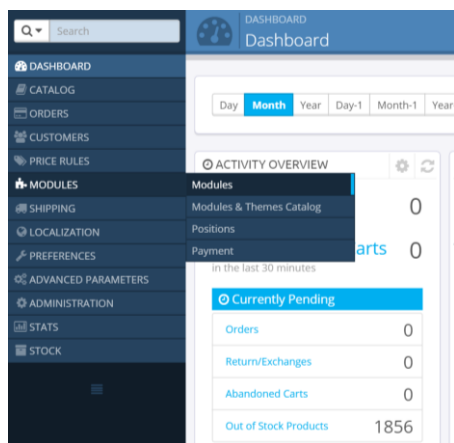
Using Presta PT Invoice - ENU
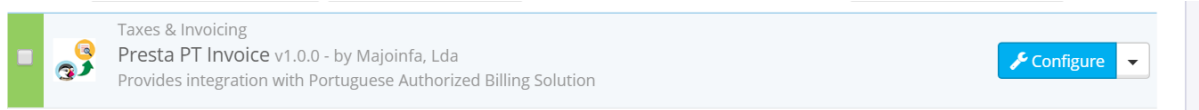
ACTIVATE PRODUCT INTEGRATION

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"
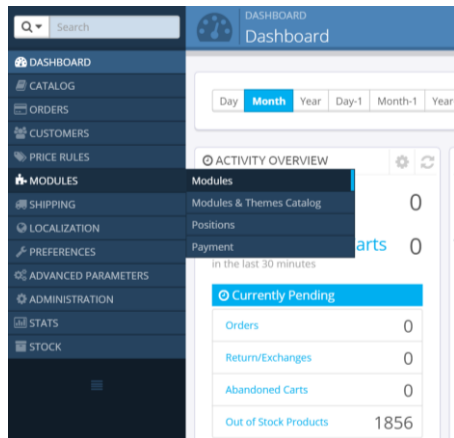

Enable Products Integration Configuration

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
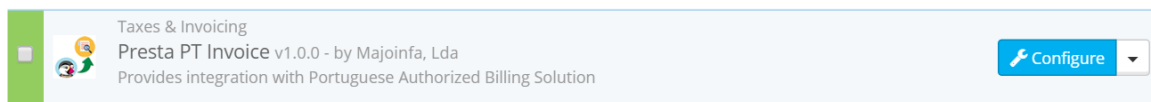
Login to your back office

Menu Modules -> Modules

Search for Presta PT Invoice Module and click "Configure"

Enable Customers Integration

MANUAL CUSTOMER CREATION

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

Access Customer List: Customer -> Customer

Select a customer

Scroll down to PHC FX box

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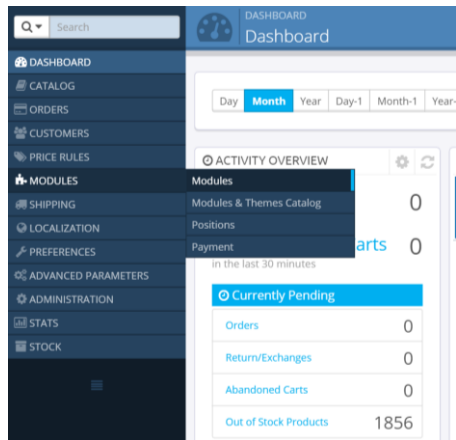

Click "Send to PT Invoice"

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
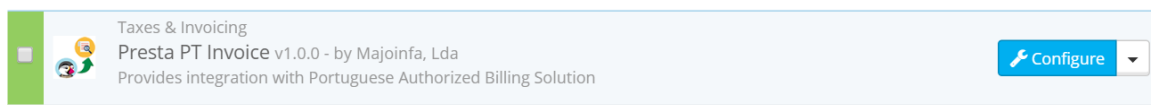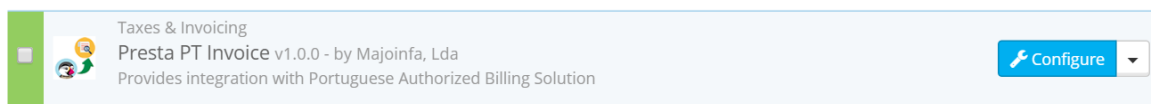
Login to your back office

Menu Modules -> Modules

Search for Presta PT Invoice

Click "Configure"

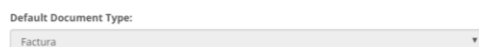Enable Orders Integration

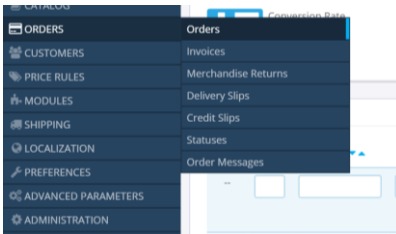Choose the billing document that will be created in PHC FX
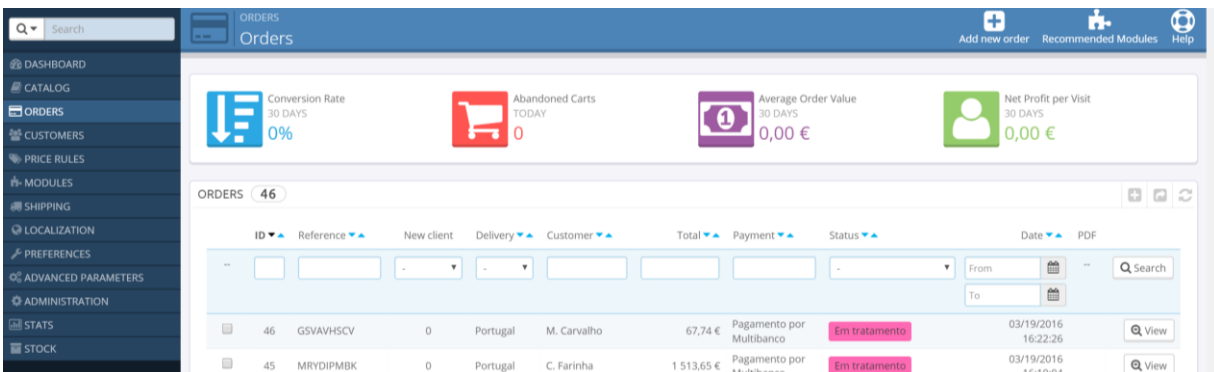
MANUAL BILLING DOCUMENT CREATION

If needed you can create a billing document in PHC FX on demand.
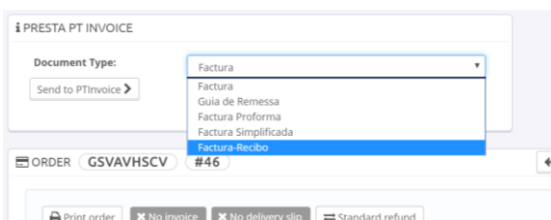
Access Orders List: Orders -> Orders

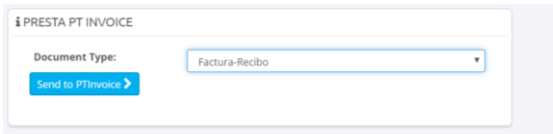

Choose an Order

Scroll down to PrestaPTInvoice box

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

Click "Send to PTInvoice"