



- **Installation**
- **Configuration**
- **Purchase Management**

Magento 2 Purchase Management Extension

Installation

Never do anything directly on a live store. First setup and test on a development domain (i.e. “dev.url.com”).

Make sure that you [set](#) your Magento application to the developer [mode](#).

Temporarily disable Magento cache

To avoid any possible issues with the installation we recommend disabling Magento cache before proceeding with the installation and re-enabling it once the install is complete.

1. Log in to your Magento admin
2. Go to System > Cache Management
3. Select “Select All” in the “Mass Actions” drop down
4. Select “Disable” in the “Actions” drop down and Click Submit
5. Once the page reloads **log out of the admin**

- DASHBOARD
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Cache Management

Disable

Submit

13 records found (13 selected)

Flush Cache Storage

Flush Magento Cache

<input checked="" type="checkbox"/>	Cache Type	Description	Tags	Status
<input checked="" type="checkbox"/>	Configuration	Various XML configurations that were collected across modules and merged	CONFIG	DISABLED
<input checked="" type="checkbox"/>	Layouts	Layout building instructions	LAYOUT_GENERAL_CACHE_TAG	DISABLED
<input checked="" type="checkbox"/>	Blocks HTML output	Page blocks HTML	BLOCK_HTML	DISABLED
<input checked="" type="checkbox"/>	Collections Data	Collection data files	COLLECTION_DATA	DISABLED
<input checked="" type="checkbox"/>	Reflection Data	API interfaces reflection data	REFLECTION	DISABLED
<input checked="" type="checkbox"/>	Database DDL operations	Results of DDL queries, such as describing tables or indexes	DB_DDL	DISABLED
<input checked="" type="checkbox"/>	EAV types and attributes	Entity types declaration cache	EAV	DISABLED
<input checked="" type="checkbox"/>	Customer Notification	Customer Notification	CUSTOMER_NOTIFICATION	DISABLED
<input checked="" type="checkbox"/>	Integrations Configuration	Integration configuration file	INTEGRATION	DISABLED
<input checked="" type="checkbox"/>	Integrations API Configuration	Integrations API configuration file	INTEGRATION_API_CONFIG	DISABLED
<input checked="" type="checkbox"/>	Page Cache	Full page caching	FPC	DISABLED
<input checked="" type="checkbox"/>	Translations	Translation files	TRANSLATE	DISABLED
<input checked="" type="checkbox"/>	Web Services Configuration	REST and SOAP configurations, generated WSDL file	WEBSERVICE	DISABLED

Upload Extensions

Unzip the extension zip file and upload all files and folders of Backend and Purchase extension to the root folder of your Magento installation.

1. Enable Acx_Backend and Acx_Purchase modules.
2. Upgrade and deploy

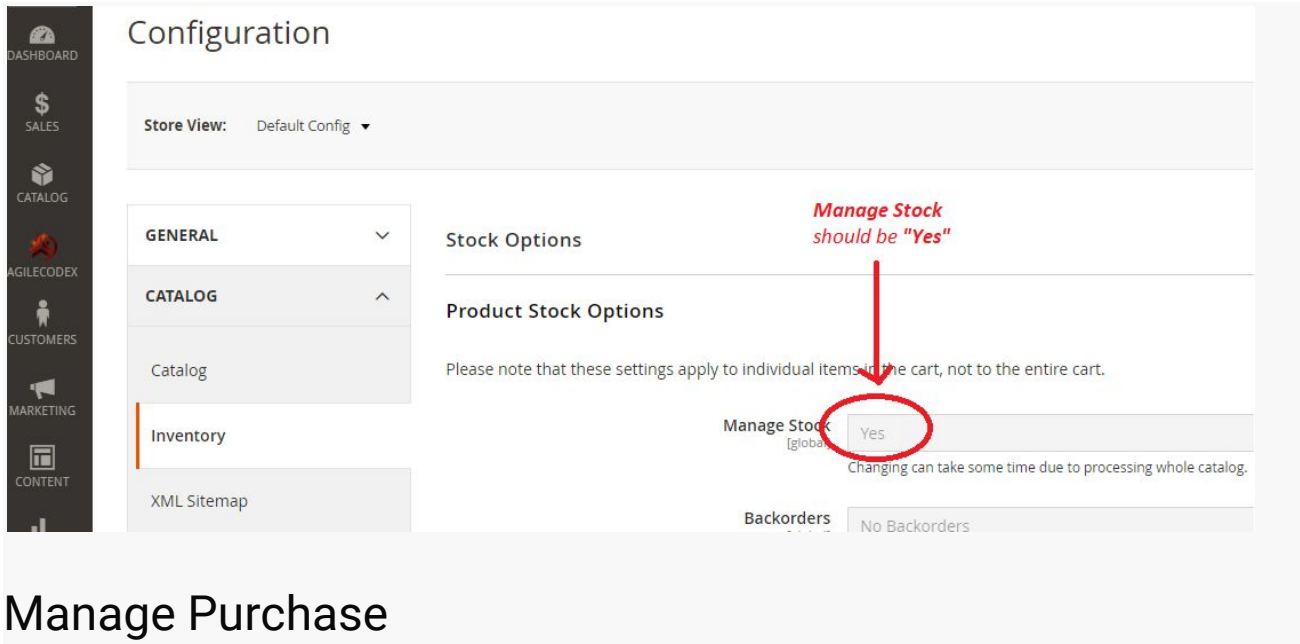
For how to enable magento 2 module follow this [link](#).

That's it! You are good to go with **Acx Purchase Management** Extension!

Configuration

Manage Stock

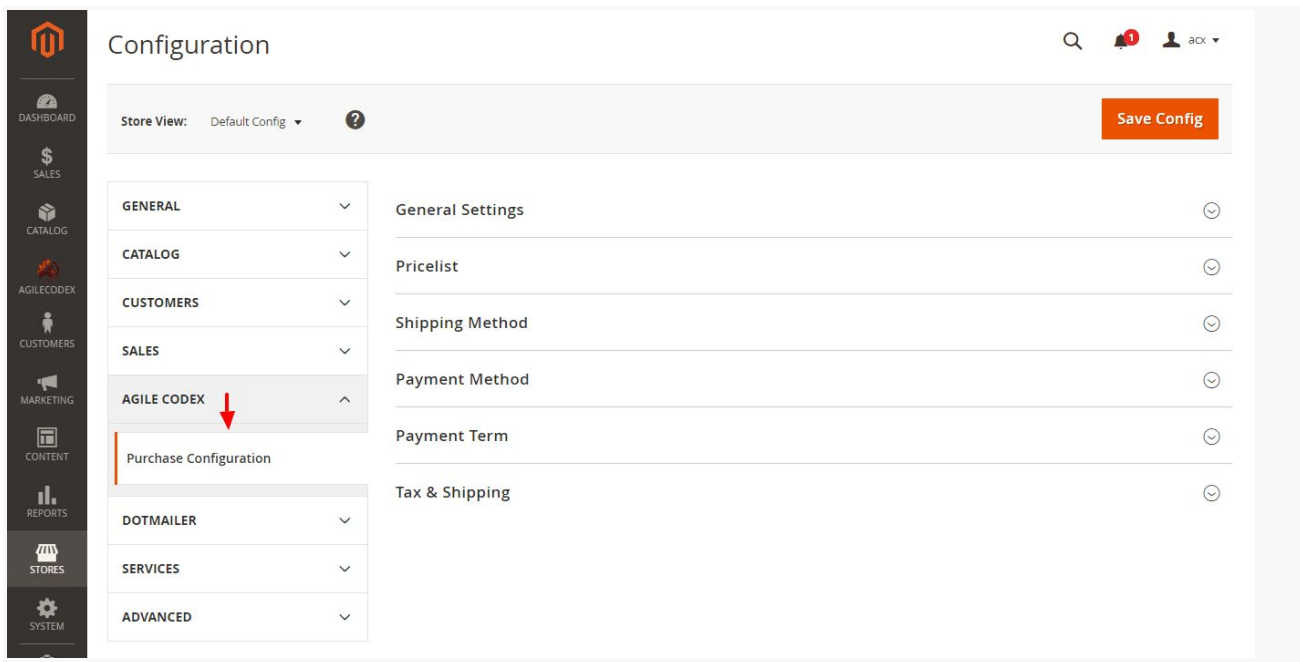
1. Go to Stores -> Settings -> Configurations -> CATALOG -> Inventory and Select Yes to "Manage Stock".



The screenshot shows the 'Configuration' page with a sidebar on the left containing icons for Dashboard, Sales, Catalog, AgileCodeX, Customers, Marketing, and Content. The main area is titled 'Configuration' and has a 'Store View: Default Config' dropdown. Below this is a 'GENERAL' tab with a dropdown menu showing 'Catalog', 'Inventory', and 'XML Sitemap'. The 'Inventory' tab is selected, showing 'Stock Options' and 'Product Stock Options'. A red arrow points to the 'Manage Stock' dropdown, which is set to 'Yes'. A red text annotation above the arrow says 'Manage Stock should be "Yes"'. Below the dropdown, it says 'Changing can take some time due to processing whole catalog.' There is also a 'Backorders' dropdown set to 'No Backorders'.

Manage Purchase

1. Go to Stores -> Settings -> Configurations -> AGILE CODEX -> Purchase Configuration



The screenshot shows the 'Configuration' page with a sidebar on the left containing icons for Dashboard, Sales, Catalog, AgileCodeX, Customers, Marketing, and Content. The main area is titled 'Configuration' and has a 'Store View: Default Config' dropdown. Below this is a 'GENERAL' tab with a dropdown menu showing 'Purchase Configuration', 'DOTMAILER', 'SERVICES', and 'ADVANCED'. The 'Purchase Configuration' option is highlighted with a red arrow. The main area also shows a list of settings: General Settings, Pricelist, Shipping Method, Payment Method, Payment Term, and Tax & Shipping. Each setting has a dropdown arrow. There is a 'Save Config' button in the top right corner.

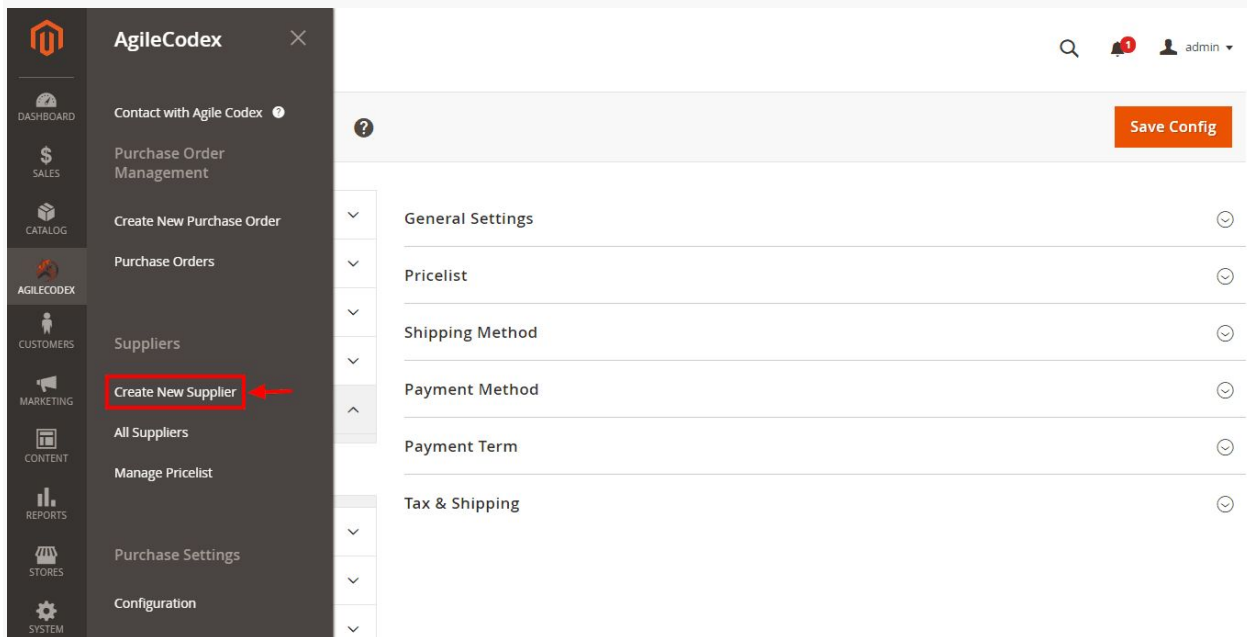
2. **General setting:** you can enable or disable the extension.
3. **Pricelist:** This is the allowed option of either pricelist is imported from supplier or not
4. **Shipping Method:** Here you can select the shipping method of you Purchase product.
5. **Payment Method:** From here you can select the payment method, either is it cash on delivery, or Bank cash, or Credit Card.

6. **Payment Term:** It is just a order cancellation term. Admin fixed the rules of payment of the order
 7. **Tax & Shipping:** You can provide tax, tax payment rule etc from here.
-

Purchase Management

Manage Supplier

Purchase Order provides you a summarized listing page to manage all suppliers. From this view, you can enable/disable/delete suppliers in mass or view/edit each one in details. Supplier is a person or company from where you can purchase your store product.



Create New Supplier

[← Back](#)[Save](#)

Basic Supplier Information



Supplier Code *

Supplier Name *

Name of Primary Contact *

Supplier Email *

Notes About Supplier

Status

Supplier Address



Supplier Address:

Create New Supplier

[← Back](#)[Save](#)

Supplier Address



Street Address

City

Country

Region


Zip/Postal Code

Phone number

Fax

Website

After creating supplier you can see the supplier list. You can edit or delete from here

 AgileCodex ×

DASHBOARD

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CATALOG

AGILECODEX

CUSTOMERS

MARKETING

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Purchase Order Management

Create New Purchase Order

Purchase Orders

Suppliers

Create New Supplier

All Suppliers

Manage Pricelist

Purchase Settings

Configuration

?

Save Config

General Settings

Pricelist

Shipping Method

Payment Method

Payment Term

Tax & Shipping

DASHBOARD

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AGILECODEX

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Purchase Order Management

Create New Purchase Order

Purchase Orders

Suppliers

Create New Supplier

All Suppliers

Manage Pricelist

Purchase Settings

Configuration



admin ▾



Save Config

General Settings



Pricelist



Shipping Method



Payment Method



Payment Term



Tax & Shipping



All Suppliers

  admin ▾[Create New Supplier](#)

Filters

 Default View ▾ Columns ▾

Actions ▾

1 records found

20 ▾ per page

<

1

of 1

>

<input type="checkbox"/>	Supplier Code	Total Product	Purchase Total Value	Last Purchase Order On	Status	Action
<input type="checkbox"/>	123	1	\$620.00	Oct 9, 2017	Enable	Edit

Manage Pricelist

>> You can manage price list which provides the supplier. From here you can decide the best supplier.

AgileCodex

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Purchase Order Management

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Purchase Orders

Suppliers

Create New Supplier

All Suppliers

Manage Pricelist

Purchase Settings

Configuration

?

Save Config

General Settings

Pricelist

Shipping Method

Payment Method

Payment Term

Tax & Shipping

System Messages: 1

Manage Supplier Offered Price

Add Pricelist

Import Pricelist

Filters

Default View

Columns

Actions

1 records found

20 per page

1 of 1

	Product SKU	Supplier	Supplier SKU	Minimal Qty	Cost	Offer Start at	Offer End at	Action
	webpos-customsale	Mamun(123)	sup-123	10.0000	50.0000	Oct 6, 2017	Oct 18, 2017	Select

Create price list: For creating pricelist go to Manage pricelist then Add pricelist

Add Pricelist to supplier

Cancel

Add selected product(s)

Select a supplier

Supplier *Mamun(123)▲

Pricelist

Select Products

>>Then you should select product

Select Products

Cancel

Select Product

Filters

Default View

Columns

2 records found

20 per page

1 of 1

<input type="checkbox"/>	Product ID	SKU	Product Name
<input type="checkbox"/>	1	pos-customsale	Custom Sale
<input type="checkbox"/>	2	webpos-customsale	Shoe

Purchase Order

Purchase Order is one of the most difficult parts to handle in inventory management but we will give you a hand with Purchase Management. In our extension, you can create a new purchase order manually or convert it from a quotation. If you have had quotations in the system, we do recommend you convert them to purchase orders, which save 90% of your time and eliminate any errors.

Dashboard
Sales
Catalog
AGILECODEX
Customers
Marketing
Content
Reports
Stores
System

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Purchase Order Management
Create New Purchase Order
Purchase Orders
Suppliers
Create New Supplier
All Suppliers
Manage Pricelist
Purchase Settings
Configuration

?

Save Config

General Settings
Pricelist
Shipping Method
Payment Method
Payment Term
Tax & Shipping

All Purchase Orders

admin

Create New Purchase Order

Filters

Default View

Columns

Export

8 records found

20 per page
1 of 1

	PO Number	Purchase Date	Expected Delivery Date	Supplier	Requested Qty	Received Qty	Billed Qty	Total Paid	Grand Total (Incl. Tax)	Status	Action
<input type="checkbox"/>	PO00000008	10/09/2017		Mamun	2.0000	2.0000	0.0000	\$0.00	\$80.00	Completed	View
<input type="checkbox"/>	PO00000007	10/09/2017		Mamun	4.0000	0.0000	0.0000	\$0.00	\$160.00	Processing	View
<input type="checkbox"/>	PO00000006	10/09/2017		Mamun	0.0000	0.0000	0.0000	\$0.00	\$0.00	Pending	View
<input type="checkbox"/>	PO00000005	10/09/2017		Mamun	0.0000	0.0000	0.0000	\$0.00	\$0.00	Pending	View
<input type="checkbox"/>	PO00000004	10/09/2017	10/11/2017	Mamun	5.0000	5.0000	0.0000	\$0.00	\$260.00	Completed	View
<input type="checkbox"/>	PO00000003	10/06/2017		Mamun	4.0000	4.0000	0.0000	\$0.00	\$200.00	Completed	View
<input type="checkbox"/>	PO00000002	10/06/2017		Mamun	4.0000	4.0000	0.0000	\$0.00	\$200.00	Completed	View

Create purchase order: You can create purchase order from "Create new Purchase Order"

DASHBOARD

SALES

CATALOG

AGILECODEX

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

Contact with Agile Codex

Purchase Order Management

Create New Purchase Order

Purchase Orders

Suppliers

Create New Supplier

All Suppliers

Manage Pricelist

Purchase Settings

Configuration

?

Save Config

General Settings

Pricelist

Shipping Method

Payment Method

Payment Term

Tax & Shipping

New Purchase Order

0

2

3

4

New

Pending

Processing

Completed

Prepare Product List

General Information

Created at *

Supplier Name *

Please select a supplier

Currency *

US Dollar

Currency Exchange Rate *

1

(1 USD = 1 USD)

Notes

>>Then you have to select product from the supplier.

Purchase Order #PO000000008

1

New

2

Pending

3

Processing

4

Completed

Cancel

Send Request

Print

Save

Confirm Purchase Sales

Summary Information

Created at:	October 9, 2017	Payment Term	N/A
Purchase from:	Mamun (123)	Shipping Method	N/A

- Import Products
- Back Sales Products
- All Supplier Products

Search

Reset Filter

0 records found

20 per page

1 of 1

	SKU	Product Name	Supplier SKU	Current Cost(USD)	Purchase Cost (USD)	Tax (%)	Discount (%)	Qty Orderring	Action
Any				From	From	From	From	From	
				To	To	To	To	To	

All Supplier Products

Cancel

Add Selected Products

Filters

Default View

Columns

1 records found

20

per page

<

1

of 1

>

<input type="checkbox"/>	ID	Product Sku	Supplier Sku	Product Name	Current Cost
<input type="checkbox"/>	2	webpos-customsale		Shoe	\$0.00

Shipping information: Provide the shipping address, method payment method etc.

Purchase Order #PO000000008

[Cancel](#)[Send Request](#)[Print](#)[Save](#)[Confirm Purchase Sales](#)

Shipping and Payment

Shipping Address

Shipping Method

Shipping Cost

Shipping Date

Expected Delivery Date

Payment Term

Order Placement Via

General Information

Receive Product: After successful placing order, you should receive the product now. How many product you find it will provide and mention the receive quantity and price, tax, etc.

Received Items



Receive All Items Receive Items

Filters Default View Columns Export

0 records found

20 per page 1 of 1

	Received Date	Our SKU	Product Name	Supplier SKU	Received Qty	Created By
We couldn't find any records.						

Returned Items



Invoices



Shipping & Billing



Create Invoice: Now your task is to create invoice.
Mention the quantity, price, tax etc.

Purchase Order #PO00000008

Cancel

Save

[Send Email](#)

Print

Complete PO

Invoices

Create an Invoice

 Filters

Default View ▼


 Columns ▼ Export ▼

0 records found

20 ▼ per page



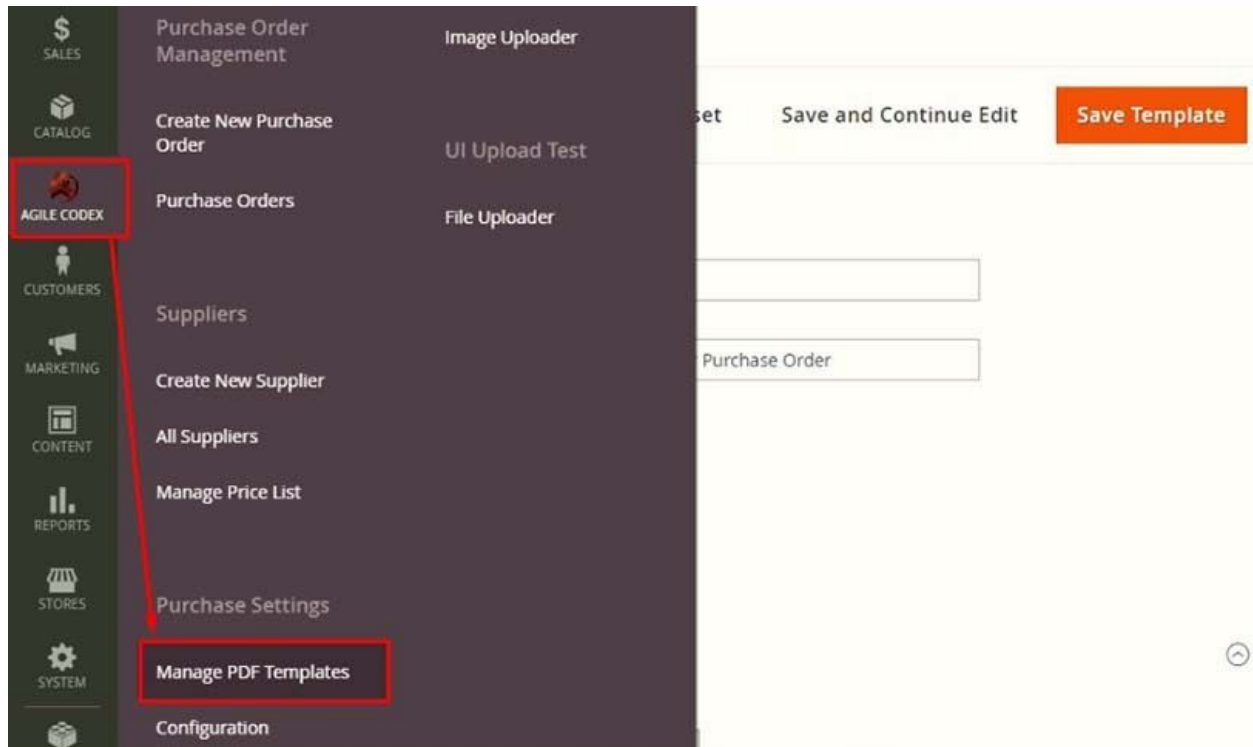
1 of 1

	Invoice ID	Billed Date	Invoice Total	Total Paid	Total Refund	Billed Qty	Action
---	------------	-------------	---------------	------------	--------------	------------	--------

We couldn't find any records.

Manage PDF Template

Now your task is to mention template variables on a PDF template.



Template Variable

- purchase_order = In purchase_order variable purchase related information in this object. To get Purchase order code use {{var purchase_order.purchase_code}},
- comments = To get comment use {{ var.comments }}.
- supplier = To get Supplier company name use {{ var supplier.name}}. To get supplier street use {{var supplier.street}} To get supplier city use {{ var supplier.city}},
- logo_url = To get logo url use {{ var logo_url}}
- store_address = To get Store Address use {{ var store_address | raw}}
- store_region = To get region of store use {{ var store_region}}
- Store_street1 = To get street Line 1 use {{ var store_street1 }}

- store_street2 = To get street Line 2 use {{ var store_street2 }}
- store_country = To get country of store use {{ var store_country }}
- store_telephone = To get store telephone no use {{ var store_telephone }}
- purchase_date = To get purchase date use {{ var purchase_date }}
- supplier_country = To get supplier country, use {{ var supplier_country }}

Mention the template variable in PDF template header.

Template Purchase Order Temp...

← Back
Delete Template
Reset
Save and Continue Edit
Save Template

Template header

Show / Hide Editor
Insert Image...
Insert Variable...

```

<div style="height: 60cm;;display:block;" class="topheader">
<div id="company" style="float: left; text-align: left; width: 30%;">
<p></p>
</div>
<div id="company" style="float: right; text-align: left; width: 70%;" class="slogan">
<p>Innovative IT Solution for Growth</p>
</div>
<div class="label" valign="bottom" style=" width: 100%;" class="store-address">
  <hr style="width: 100%; height: 1px; display: inline-block;">
  <div>{{var store_obj.getName()}}, {{var store_street1}}, {{var store_street2}}</div>
  <div>{{var store_obj.getCity()}}, {{var store_region}} {{var store_obj.getPostcode()}}, {{var store_country}}</div>
  <hr style="width: 100%; height: 1px; display: inline-block;">
</div>
</div>

```

Mention the template variable in the PDF template body.

Template Purchase Order Temp...

[← Back](#) [Delete Template](#) [Reset](#) [Save and Continue Edit](#) [Save Template](#)

Template body

[Show / Hide Editor](#) [Insert Image...](#) [Insert Variable...](#)

```
<div style="margin-top: 120px; margin-right: 20px; position: absolute;">
<div>
<div class="body" style="position: fixed; width: 100%; margin-top: 10px; color: #555555; background: #FFFFFF; font-family: Arial;
font-size: 14px;">
<div class="clearfix header" style="padding: 10px 0; margin-bottom: 20px;">
<div id="company" style="float: left; text-align: left; width: 65%;">
<h2 class="name" style="font-size: 1.4em; font-weight: normal; margin: 0;">Delivery address:</h2>
{{var store_address|raw}}
</div>
<div id="invoice" style="float: right; text-align: left; width: 35%;">
<h2 class="name" style="font-size: 1.4em; font-weight: normal; margin: 0;">{{var supplier.supplier_name }}</h2>
<div>{{var supplier.street}}</div>
<div>{{var supplier.city}}, {{var supplier.country}}</div>
</div>
</div>
<div class="">
</div>
<div id="thanks" style="font-size: 19.3px; font-family: Arial, serif; margin-bottom: 50px;">
<h3>Purchase Order# {{var purchase_code }}</h3>
```

Mention the template variable in PDF template footer and design related css in template css.

Template Purchase Order Temp...

[← Back](#)[Delete Template](#)[Reset](#)[Save and Continue Edit](#)[Save Template](#)

Template footer

[Show / Hide Editor](#)[Insert Image...](#)[Insert Variable...](#)

```
<div>
<hr style="width: 100%; height: 1px; display: inline-block;">
<div style="text-align:center;">
  Telephone: +880 02 9137384; Email: support@agilecodex.com  website: https://www.agilecodex.com
</div>
<div style="text-align:center; ">
  FAX 123456789; Citi Bank: 123456789123456; Dutch Bangla Bank: 123456789123456;
</div>
</div>
```

Template css

```
.topheader {
  font-family: Arial,serif;
  font-size: 9.0px;
  color: rgb(0.0.0);
```

Thank You

Once again, thank you so much for purchasing this extension, I'd be glad to help you if you have any questions relating to this extension. No guarantees, but I'll do my best to assist

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