

User Manual

SmartConnect | Magento 2

Table of Contents

1	Brief introduction	3
2	Login.....	4
3	SmartConnect in Magento.....	5
	<i>3.1 Sales > Orders.....</i>	<i>5</i>
	<i>3.2 Sales > Shipments.....</i>	<i>7</i>
4	Functionalities in the checkout	8
	<i>4.1 Transporter profiles.....</i>	<i>8</i>
	<i>4.2 Location selector.....</i>	<i>8</i>
5	Posting and printing shipments from the order overview.....	11
	<i>5.1 Single orders.....</i>	<i>11</i>
	<i>5.2 Book and print multiple orders at the same time.....</i>	<i>13</i>
	<i>5.3 Editing the shipment.....</i>	<i>15</i>
	<i>5.4 Create partial deliveries.....</i>	<i>16</i>
6	Print shipments from the shipments overview.....	18
7	Send a self-created order.....	19
8	Overview statuses	20
9	Printing from Magento.....	21

1 Brief introduction

Before you can make a booking, you first need to configure SmartConnect in Magento. For the configuration we have written a separate manual that you can find on our website (www.transsmart.com/manuals).

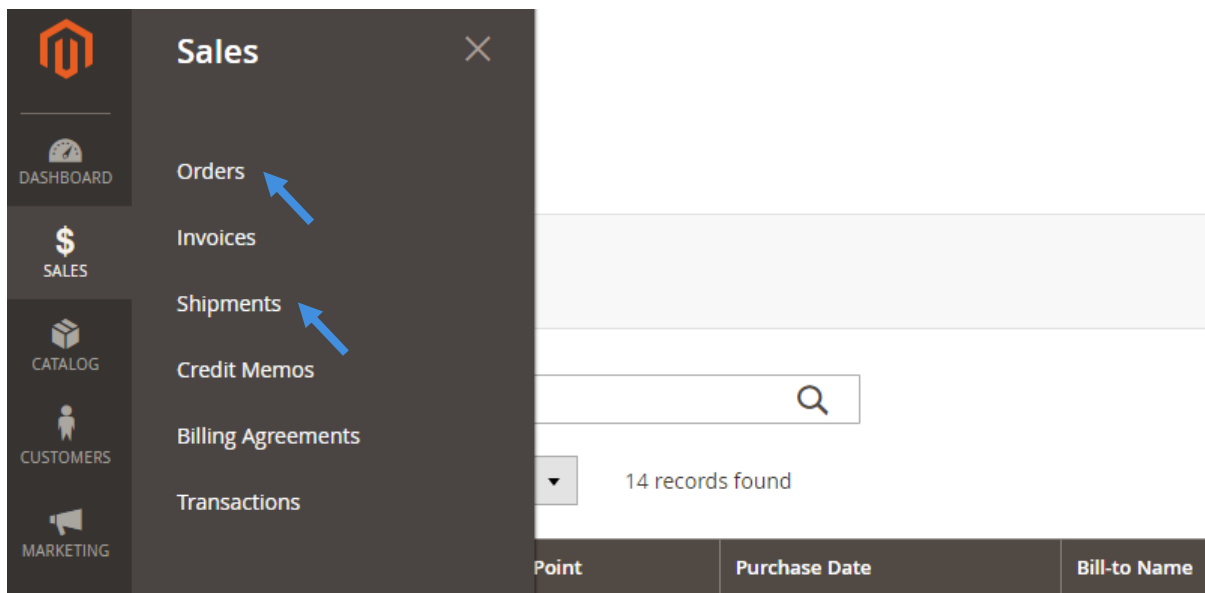
When the configuration is ready, you can start making bookings and printing shipments in Magento with SmartConnect. This document gives step-by-step instructions how to do this.

2 Login

Log in to your Magento environment, as you usually do with your existing Magento login details.

3 SmartConnect in Magento

SmartConnect can, after installation, be used in two places in your Magento environment. Namely for Sales > Orders and Sales > Shipments.



3.1 Sales > Orders

If you go to Sales > Orders via the menu, you will see an overview of all orders placed in your web shop. A column has been added to the right of this overview: Transsmart Status.

Orders Create New Order

Actions 92 records found 🔍 ⚙️ 📄 200 < >

ID	Purchase Point	Purchase Date	Ship-to Name	Grand Total (Base)	Status	Shipping Information	Subtotal	Shipping and Handling	Transsmart Status
000000361	Main Website Main Website Store Default Store View	Feb 19, 2018 4:28:56 PM		€ 19,50	Pending	Bezorgoptie - PostNL - Standaard levering	€ 16,00	€ 3,50	Pending
000000360	Main Website Main Website Store Default Store View	Feb 19, 2018 4:16:30 PM		€ 38,50	Pending	PostNL Pickup point - Post NL Webservices	€ 35,00	€ 3,50	Pending
000000359	Main Website Main Website Store Default Store View	Feb 16, 2018 2:55:34 PM		€ 37,50	Pending	DPD Parcelshop met SMS - DPD	€ 35,00	€ 2,50	Pending
000000358	Main Website Main Website Store Default Store View	Feb 15, 2018 8:31:52 PM		€ 37,50	Pending	DPD Parcelshop met SMS - DPD	€ 35,00	€ 2,50	Pending
000000357	Main Website Main Website Store Default Store View	Feb 15, 2018 8:24:06 PM		€ 37,75	Processing	D4U Servicepoint - DHL For You	€ 35,00	€ 2,75	Exported
000000356	Main Website Main Website Store Default Store View	Feb 15, 2018 8:23:10 PM		€ 37,50	Processing	DPD Parcelshop met SMS - DPD	€ 35,00	€ 2,50	Exported

This column shows you whether the shipment has already been exported to Transsmart. Several statuses are possible, namely:

- Pending | The shipment has not yet been created and booked, but a Transsmart transporter profile has been selected.
- Exported | A shipment has been created and booked and/or printed. In the Magento menu sales > shipments you can see the current Transsmart status of the shipment.
- Partially Exported A shipment has been created and booked and/or printed for a part of the order. If you open the order you can see which and how many products have been delivered to date.
- Error | The shipment was created and booked but received an error message from Transsmart. Open the shipment to see what went wrong.

In addition, several actions have been added to actions (top left):

- Transsmart: Book & Print
- Transsmart: Book
- Transsmart: Print Labels

14 records found (3 selected)

	Purchase Date
Store View	Dec 20, 2017 2:26:32 PM
Store View	Dec 20, 2017 10:09:56 AM
Store View	Dec 19, 2017 4:47:09 PM
Store View	Feb 2, 2017 4:04:18 PM
Store View	Jan 11, 2017 5:41:35 PM

We will discuss these actions in detail later.

3.2 Sales > Shipments

If you go to Sales > Shipments via the menu, you will see an overview of all shipments that have been created and booked for the orders. Two columns have been added to this overview:

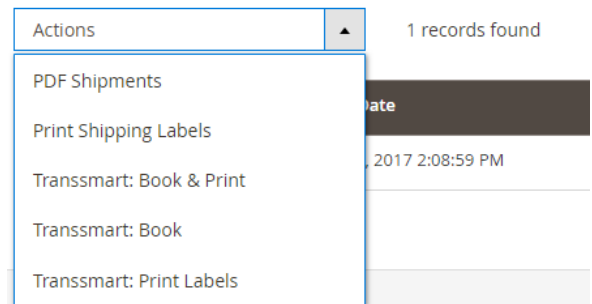
- Transsmart status | There are 12 statuses possible. The overview for these can be found in [chapter 8](#).
- Tracking URL | If your carrier has a Track & Trace page available, you will be directly linked to this if you click on 'Track'.

Total Quantity	Shipping Information	Action	Transsmart Status	Tracking Url
1	Bezorging - DHL 4 YOU	View	LABL	Track
1	UPS pickup point - United Parcel Service	View	BOOK	Track
1	Bezorging - DPD Classic	View	LABL	Track
1	Bezorging - UPS Standard	View	BOOK	Track
1	PostNL Pickup point - Post NL Webservices	View	BOOK	Track
1	DHL 4 You Servicepoint - DHL For You	View	LABL	Track

In addition, various actions have also been added here:

- Transsmart: Book & Print
- Transsmart: Book
- Transsmart: Print Labels

We will discuss these actions in detail later.



4 Functionalities in the checkout

4.1 Transporter profiles

The visitor to your web shop sees the transporter profiles you have configured in Magento in the checkout for shipping method.

Shipping Methods		
<input type="radio"/>	€ 5,00 Fixed	Standaard verzending
<input checked="" type="radio"/>	€ 3,00 Aphaallocatie	Selecteer locatie
<input type="radio"/>	€ 3,50 DPD classic	Bezorgoptie
<input type="radio"/>	€ 4,00 PostNL standaard	Bezorgoptie
<input type="radio"/>	€ 6,00 DHL 4 You - Avond levering	Bezorgoptie

When a shipping method is selected, you will receive the order in Magento with the relevant carrier profile.

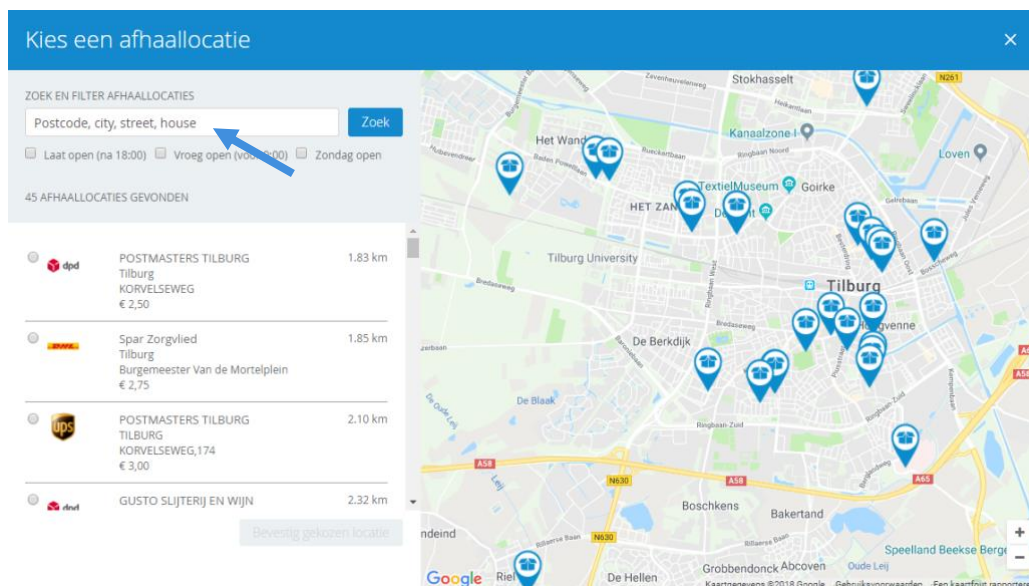
The transport costs that are visible to the customer can be determined per transporter profile in the configuration (see configuration manual). These costs are counted in the total amount that the customer pays. Please note: this is not necessarily the actual rate that you pay to the carrier for the transport, but the rate that you want to pass on to the customer.

4.2 Location selector

Various carriers offer a service to have parcels delivered at a pick-up location (also known as a service point or Parcel shop). The location selector is a tool that gives an overview of these locations

in the form of a map and a list of pick-up locations, both in the frontend (web shop, what the customer sees) and in the backend (Magento, your management environment).

Your customers see the pick-up locations in the checkout for the shipping methods. When the customer clicks on 'Select location' a pop-up with a map and list of found pick-up locations in the region of the postal code of the delivery address will appear.



The postcode finder at the top left makes it possible for your customer to select a pick-up location in another region. In addition, you will see 3 more options:

- Open late (after 18.00) | Shows all pick-up locations that are open after 18:00.
- Open early (before 9:00) | Shows all pick-up locations that are open before 09:00.
- Open on Sunday | Shows all pick-up locations that are open on Sundays.

The location can be selected from the list and from the map. When the selection is made and confirmed, the address details of the pick-up location are used as the delivery address. In Magento the order looks like this:

Information

Invoices

Credit Memos

Shipments

Comments History

Order # 00000365 (The order confirmation email was sent)

Order Date	19 feb. 2018 16:36:35
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	87.150.248.198

Account Information [Edit Customer](#)

Customer Name	Leandra Zwijgers
Email	leandra@transsmart.com
Customer Group	General

Address Information

Billing Address [Edit](#)

Leandra Zwijgers
Elien pankhurststraat 1c
Tilburg, 5032 MD
Nederland
T: 0031612341234
leandra@transsmart.com

Shipping Address [Edit](#)

Leandra Zwijgers
Spar Zorgvlied
Burgemeester Van de Mortelplein 41
Tilburg, 5037PJ
Nederland
T: 0031612341234
leandra@transsmart.com

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using EUR.

Shipping & Handling Information

D4U Servicepoint - DHL For You € 2,75

- **Billing Address** | The original address of the side itself; this is the billing address.
- **Shipping Address** | The location where the package will be sent. In this case the location where the customer wants to pick up the package; the address of the pick-up location.
- **Shipping & Handling Information** | The shipping method (the carrier profile) that your customer has selected in the checkout with the corresponding price.
- **Order Totals** | With the order totals you see the shipping & handling costs displayed, in this example, € 2.75. These are charged, in addition to the subtotal of the order, to the customer.

Order Totals

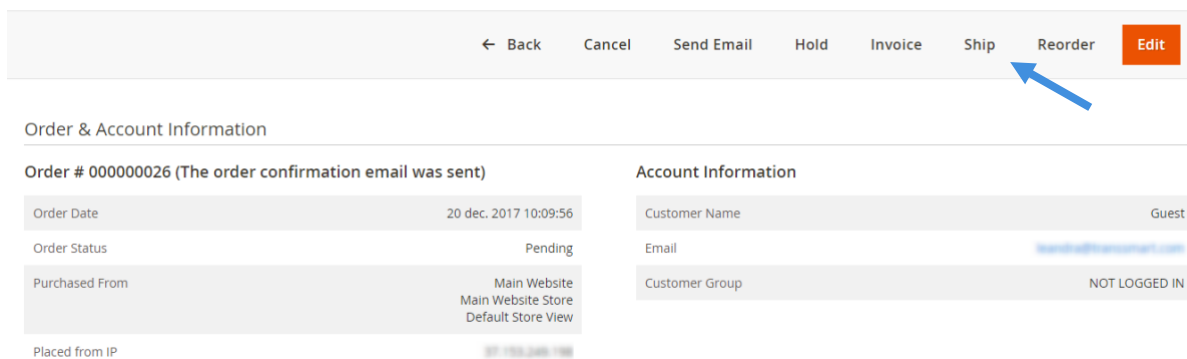
Subtotal	€ 35,00
Shipping & Handling	€ 2,75
Grand Total	€ 37,75
Total Paid	€ 0,00
Total Refunded	€ 0,00
Total Due	€ 37,75

5 Posting and printing shipments from the order overview

An order has been placed. Before you can register the shipment with the carrier and print the label, you need to create a shipment in Magento. This can be done in two ways:

5.1 Single orders

Go to Sales > Orders and open an order to be processed. As you can see, the carrier profile (including associated costs) that the customer has opted for is visible in the order. Then click on 'Ship' at the top right.



← Back Cancel Send Email Hold Invoice **Ship** Reorder Edit

Order & Account Information

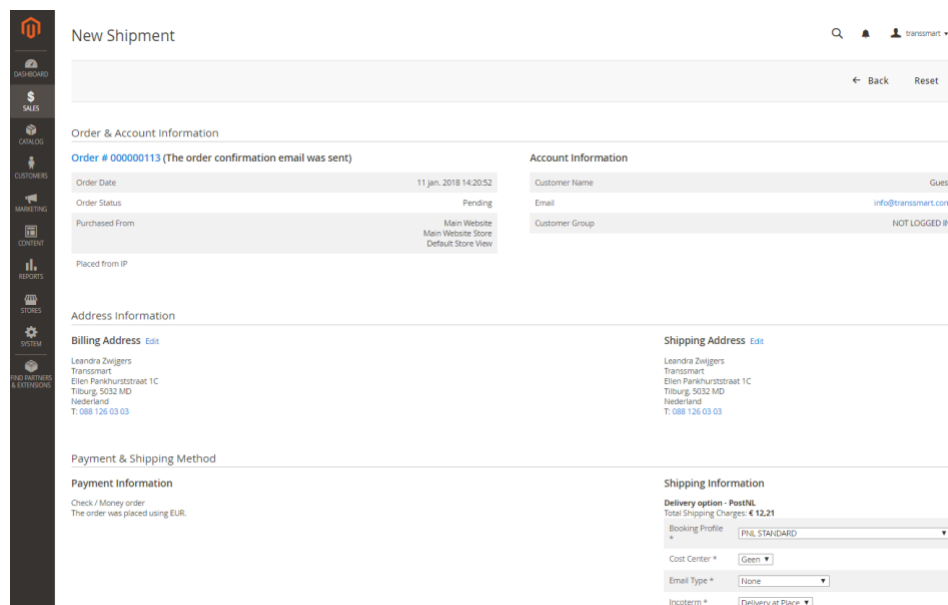
Order # 00000026 (The order confirmation email was sent)

Order Date	20 dec. 2017 10:09:56
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	37.133.246.198

Account Information

Customer Name	Guest
Email	leandra@transmart.com
Customer Group	NOT LOGGED IN

You will now enter the following screen:



New Shipment

← Back Reset

Order & Account Information

Order # 00000113 (The order confirmation email was sent)

Order Date	11 jan. 2018 14:20:52
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	

Account Information

Customer Name	Guest
Email	info@transmart.com
Customer Group	NOT LOGGED IN

Address Information

Billing Address Edit

Leandra Zwiegers
Transmart
Elien Fankhurststraat 1C
Tilburg, 5023 MD
Nederland
T: 088 126 03 03

Shipping Address Edit

Leandra Zwiegers
Transmart
Elien Fankhurststraat 1C
Tilburg, 5023 MD
Nederland
T: 088 126 03 03

Payment & Shipping Method

Payment Information

Check / Money order
The order was placed using EUR.

Shipping Information

Delivery option - PostNL
Total Shipping Charges: € 12.21

Booking Profile * PNL_STANDARD

Cost Center * Geen

Email Type * None

Incoterm * Delivery at Place

Here you can find the following information about the shipment and change it if necessary:

Shipping Information

Delivery option - PostNL
Total Shipping Charges: € 12,21

Booking Profile *

Cost Center *

Email Type *

Incoterm *

Type	Qty	Length (cm)	Width (cm)	Height (cm)	Weight (kg)	Delete
<input type="text" value="Box"/>	<input type="text" value="1"/>	<input type="text" value="10"/>	<input type="text" value="10"/>	<input type="text" value="10"/>	<input type="text" value="1"/>	

- **Booking Profile** | In the transport profile you will find the shipping method that your customer has selected in the checkout. If you have configured several carrier profiles, you can change them here by clicking on the arrow next to the drop-down menu. Caution: This is only possible for delivery options. It is not possible to change a pick-up option because your customer can no longer determine what the pick-up location is.

Changing a carrier profile affects the transport costs that you have charged your customer. Because the order in Magento has already been created, the transport costs will no longer be changed. If you do want to do this, you must cancel the order and create a completely new one.

- **Cost Centre** | This field represents a Transsmart specific setting for steerage of your transport settings. Usually this is empty, unless you have made specific agreements about it. If you have configured multiple cost centres, you can select a different cost centre here.
- **Email type** | Optionally, Transsmart will set up an e-mail notification process for you with a Track & Trace information about the shipment (if you do not use the standard Magento e-mail flow, or in addition with separate status information). A separate e-mail type has been defined per template in the settings. If you have configured multiple e-mail notifications, you can select a different e-mail type here.
- **Incoterm** | With an incoterm you determine the sales conditions with regard to responsibility for the goods and payment of transport costs during the process. If you have configured multiple incoterms, you can select a different incoterm here.

- **Package Information** | If you have configured multiple packaging types, you can choose a different packaging type here. You can also change the number, dimensions and weight. This can affect your transport costs. A shipping label is printed per package. Caution: Transsmart configures the packaging type table. This may differ per carrier.
- **Add Package** | If you have multiple packages of different sizes, you can use this button to add the package. A shipping label is printed per package.

If all conditions with which a shipment must be sent are correct, you can send the shipment to Transsmart.

Shipment Options

- Append Comments
- Email Copy of Shipment
- Transsmart: Book Shipment(s)
- Transsmart: Book & Print



Submit Shipment



- **Transsmart: Book Shipment (s)** | The shipment is made in Magento and booked with the carrier. A label is also created in the background. You can print this later.
- **Transsmart: Book & Print** You can also choose to do this in a single action. The function ensures that the shipment is created, the shipment is booked directly at the carrier and you print out the labels immediately.

5.2 Book and print multiple orders at the same time

If you want to edit and/or book multiple orders at the same time, you can choose to do this from the order overview: Sales > Orders.

In the order overview, tick the orders on the left that you want to process.

Actions 16 records found (4 selected)

<input type="checkbox"/>	ID	Purchase Point	Purchase Date	Bill-to Name
<input checked="" type="checkbox"/>	000000029	Main Website Main Website Store Default Store View	Dec 21, 2017 8:39:00 AM	Carla Schmitt
<input checked="" type="checkbox"/>	000000028	Main Website Main Website Store Default Store View	Dec 21, 2017 8:32:02 AM	Carla Schmitt
<input checked="" type="checkbox"/>	000000027	Main Website Main Website Store Default Store View	Dec 20, 2017 2:26:32 PM	Sally Whelan
<input checked="" type="checkbox"/>	000000026	Main Website Main Website Store Default Store View	Dec 20, 2017 10:09:56 AM	Carla Schmitt

Check orders

Then you can choose top-left for various actions:

Orders

Search by keyword

Actions 16 records found (4 selected)

	Purchase Date
Dec 21, 2017 8:39:00 AM	
Dec 21, 2017 8:32:02 AM	
Dec 20, 2017 2:26:32 PM	
Dec 20, 2017 10:09:56 AM	
Dec 19, 2017 4:47:09 PM	

- Cancel
- Hold
- Unhold
- Print Invoices
- Print Packing Slips
- Print Credit Memos
- Print All
- Print Shipping Labels
- Transsmart: Book & Print
- Transsmart: Book
- Transsmart: Print Labels

- Transsmart: Book | The shipments are created in Magento and are booked with the carrier(s). Labels are also created in the background. You can print them later.
- Transsmart: Book & Print You can also choose to do this in a single action. This function ensures that the shipments are created, booked directly with the carrier and you immediately print out the labels.
- Transsmart: Print Labels | After the shipments have been booked, you can always print the labels again.

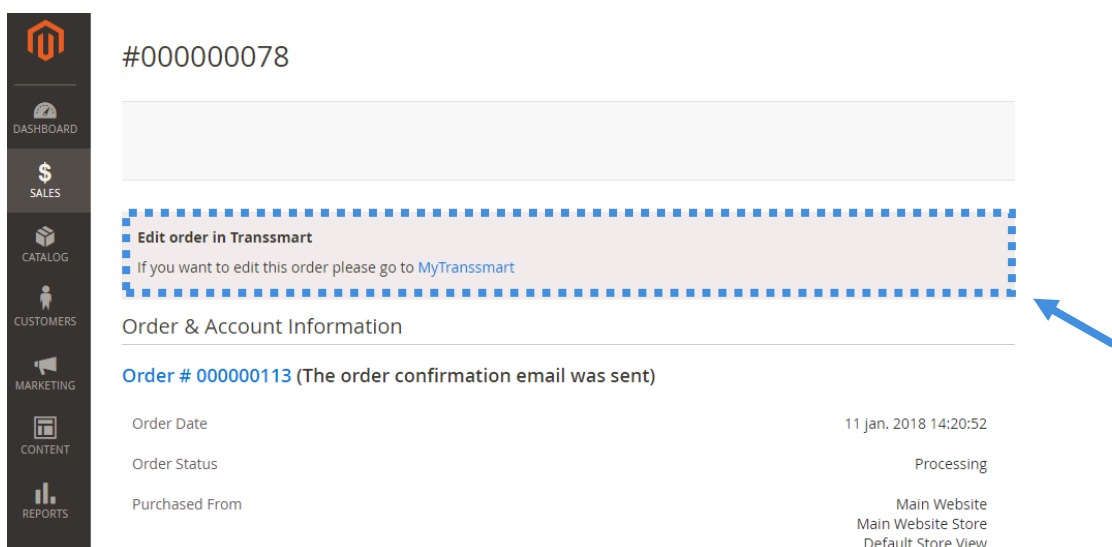
Caution! The orders are booked with the carrier profile that the customer has selected in the checkout. In addition, the shipments are automatically booked with the default cost centre, email type, incoterm and packaging.

If you still want to change this, you can do so via Sales > Shipments for the shipment concerned and if the label has not yet been printed. [See subchapter below 5.3 Editing the shipment](#) .

5.3 Editing the shipment

It is possible to edit the shipment if the label has not yet been printed. This may be because Transsmart has indicated an error because information is missing or, for example, that you want to add more information to the shipment yourself.

Go to Sales > Shipments and open the relevant shipment. You will see the following at the top left:



The screenshot shows the Transsmart Magento interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, and Reports. The main content area displays the order number #000000078. Below this is a highlighted button labeled "Edit order in Transsmart" with the text "If you want to edit this order please go to [MyTranssmart](#)". Below the button is the section "Order & Account Information" for "Order # 00000113 (The order confirmation email was sent)". The order details include: Order Date (11 jan. 2018 14:20:52), Order Status (Processing), and Purchased From (Main Website, Main Website Store, Default Store View). A blue arrow points to the highlighted button.

Because of Magento functionality you can only edit the shipment via Transsmart.

Click on the text 'Transsmart' and a new tab will open in your browser where the order is immediately visible in MyTranssmart.

You can edit the desired data here and then click on Book & Print. The track-and-trace URL, status, service level, service level time and incoterms will be updated retroactively in Magento. This synchronization is once every 5 minutes. Other data such as address data are not synchronized with Magento.

Shipments can be edited to the LABL status. If you would like to change the shipment afterwards, you will have to create a new shipment in Magento or book a shipment via <https://my.transsmart.com/>.

5.4 Create partial deliveries

It is possible to deliver the order in parts if products are not yet available. Go to Sales > Orders and search for the shipment to which you want to apply a partial delivery. Click Ship at the top right-hand corner and adjust the Shipping information if necessary ([see chapter 5.1 Single orders](#)).

Under the Shipping information you will see 'Items to Ship':

Items to Ship

Product	Qty	Qty to Ship
Testproduct 1 SKU: Testproduct 1	Ordered 2	<input type="text" value="2"/>

On the right you can indicate that you want to send 1 product instead of 2. If you have edited the number of packages to be sent, check below Transsmart: Book Shipment (s) of Transsmart: Book & Print and click Submit shipment.

The partial delivery has been created and you will see in the order that 1 of the 2 products has been shipped.

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Testproduct 1 SKU: Testproduct 1	Partial	€ 25,00	€ 25,00	Ordered 2 Shipped 1	€ 50,00	€ 0,00	0%	€ 0,00	€ 50,00

In Sales > Orders menu shows the Transsmart status edited to 'Partially Exported'. If the second product is ready for shipment you can repeat this action to send the other products and make a new shipment.

Caution! The shipping costs are only charged once to the consumer.

6 Print shipments from the shipments overview

A shipment will only be visible in the shipments overview if it has been booked from the order overview. See [chapter 5](#) how you can create a shipment from an order.

You will see various statuses of shipments in the shipments overview.

- Shipments that are booked but not yet printed have the status NEW or BOOK.
- Shipments that have already been posted and printed have the status LABL.
- Shipments that have received an error from Transsmart are not booked and have the status ERR.

A complete overview of all statuses can be found in [chapter 8](#). If you want to print one or more shipments, tick the relevant shipment (s) and choose Actions for Transsmart from the top left: Print Labels. The labels for the corresponding shipments will come out of your printer.

You can also open the relevant shipment and select Print Label at the top right.

7 Send a self-created order

When you have created an order in Magento yourself via sales > orders, you can select the transporter profile in the new order at the bottom right of Shipping Method. You can only select delivery options here.

Payment & Shipping Information

Payment Method

Check / Money order

Shipping Method *

Standaard verzending

Fixed - € 5,00

Delivery

DPD classic - € 3,50

PostNL standaard - € 4,00

DHL 4 You - Avond levering - € 6,00

Once you have determined the carrier profile, you can select 'Submit Order' at the bottom.

The order is now being created and you will be taken straight to the created order. You can then process immediately it by creating a shipment.

8 Overview statuses

Status	Meaning
NEW	The shipment has been posted in the Transsmart portal, but the shipment details have not yet been forwarded to the carrier.
BOOK	The shipment has been posted in the Transsmart portal and the shipment details have been forwarded to the carrier. Depending on the carrier/configuration, a pick-up request will also be made.
LABL	The labels for the shipment are printed.
MANI	The shipment details for the booking have been forwarded to the carrier by means of a prior notice file.
ACCEP	The carrier has received the details of the shipment by means of the prior notice file.
TRNS	"In Transit", the shipment is on its way.
DONE	The shipment has been delivered.
APOD	"Automatic Proof of Delivery". The carrier cannot provide status information. After a few days the shipment status is automatically adjusted to delivered.
REFU	"Refused". The shipment details have been forwarded to the carrier, but an error has occurred whereby the shipment has been refused. Pay close attention to the error message at the top of the screen! The shipment can be edited and re-entered.
ERROR	The shipment details cannot be sent. Probably due to missing or incorrect information. Pay close attention to the error message at the top of the screen! The shipment can be edited and re-entered.
DEL	"Deleted". The shipment has been deleted. If necessary, the pick-up request has also been cancelled.

9 Printing from Magento

Printing from Magento is fully integrated. However, this must be configured once in MyTranssmart for it to work. See the configuration manual how for to set this up.