

Order Forwarder

App manual

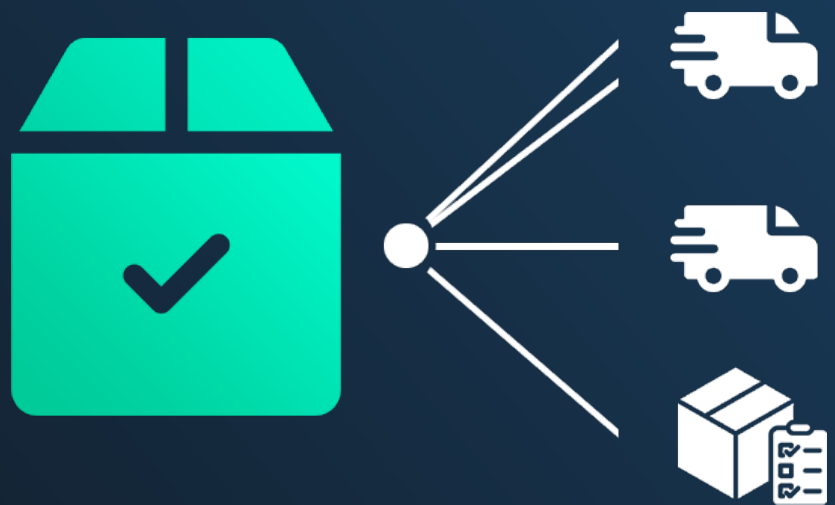


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What does the app do?

When you've set up the Order Forwarder app, all **paid** orders from your store will automatically be forwarded by email to your product's connected supplier. Ideal for when you're a drop shipper, have a fulfilment (like) company handling your orders, or just want to save time on processing your orders by automatically forwarding them to your configured recipient.

When your customer places an order containing products that belong to different suppliers, the app will detect this automatically and split up the order before forwarding it: only the ordered products that are connected to the supplier, will be sent to that specific supplier. Products that don't have a supplier connected to them will simply be ignored and won't be included in the email; this is the same for ordered products that *do* have a supplier connected in your store, but without a forwarder created for it in the app.

Depending on your app plan you can even (optionally) set up a stock level threshold so the ordered products are only forwarded if your amount of in stock items get below the set threshold, or enable the automatic packing slip PDF attachment. This way you can make the order handling even more complete.

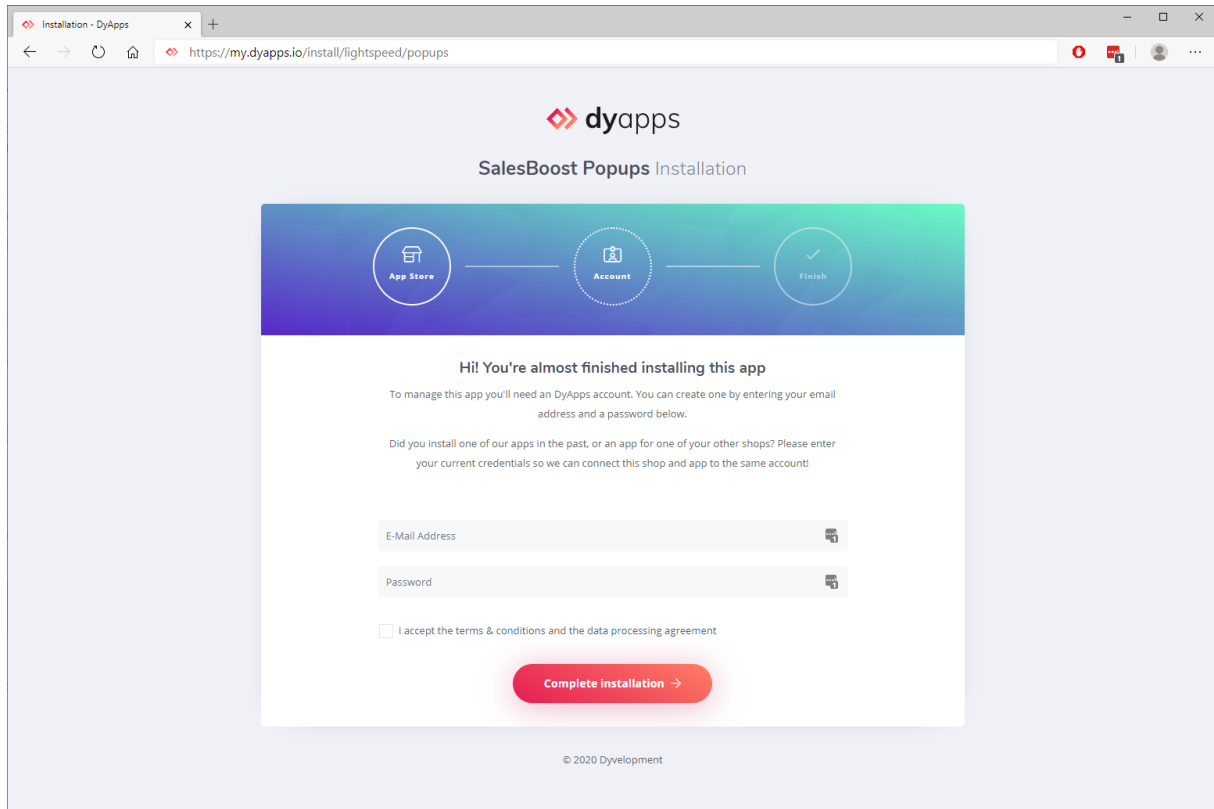
Setting up the app is plain and simple: the only thing for you to do (if not already done) is to edit your product and set the preferred supplier. Then from the app, you simply create a so called 'forwarder' for the suppliers for which you'd like to forward the orders for.

I have some specific feature requests, or want to customize the order handling workflow. Can we do that?

If you have specific requests for changes in the way your orders are forwarded, feel free to reach out to our support department. Our team will consult on your specific requests, and discuss the possibilities and associated costs for the requested changes in your app.

1. Installation & DyApps account

When you install the Order Forwarder app through your store's App Store, you'll be redirected to the DyApps installation screen.



To manage your app you'll need an account which you can log in with into the DyApps Control Panel. The DyApps Control Panel is your personal (external) environment where you can manage all DyApps apps you've installed. It's somewhat like your shop's backoffice, but for your DyApps. You can manage multiple apps from the same account and manage these for multiple shops.

Installing a DyApps app for the first time?

During the installation process you'll create your DyApps account. You can enter any email address you own and a custom password which you'll later use to log in with. Your account will be created upon completing installation.

Installed a DyApps app before?

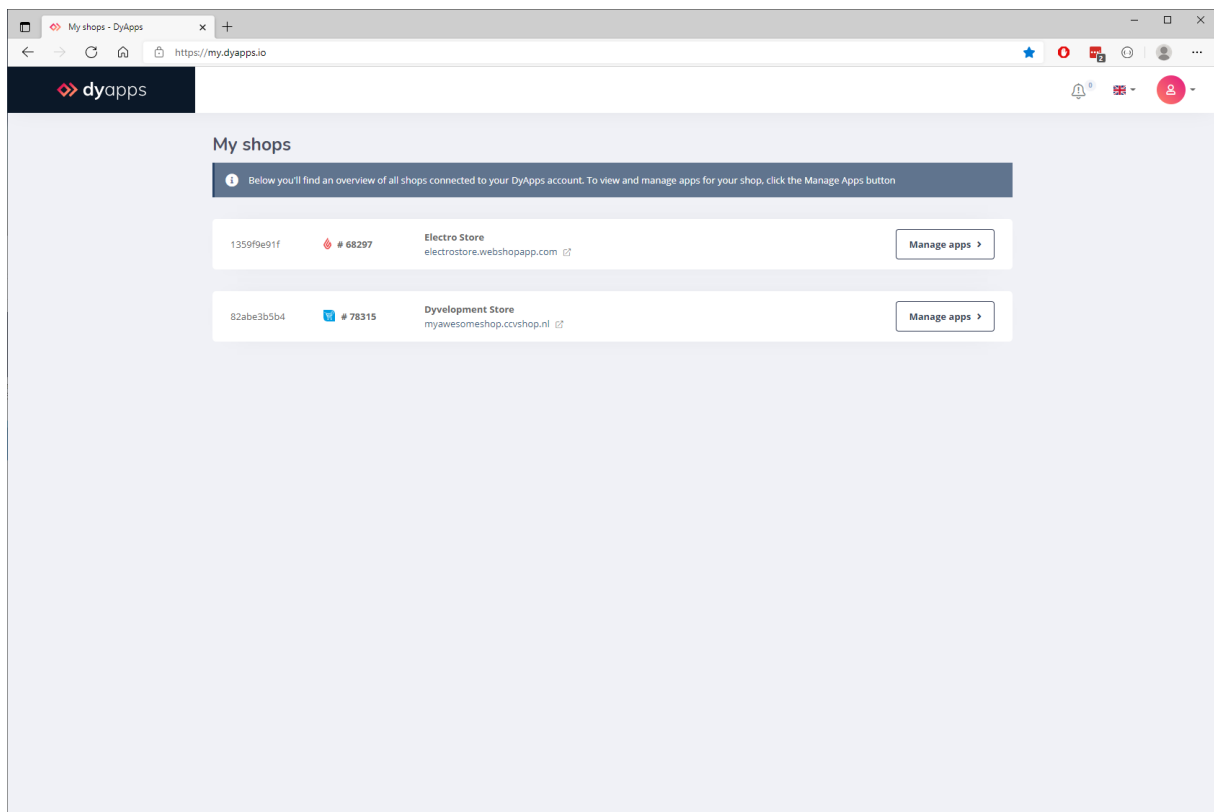
Then please enter the credentials of your current DyApps account. The app will verify your login credentials and will connect your account and shop to the app you're installing. This way you can easily manage all of your apps and shops from the same account.

2. DyApps Control Panel & shop overview

You can log into the DyApps Control Panel with your DyApps account at <https://my.dyapps.io>. From here you can manage all of your installed apps for your shop.

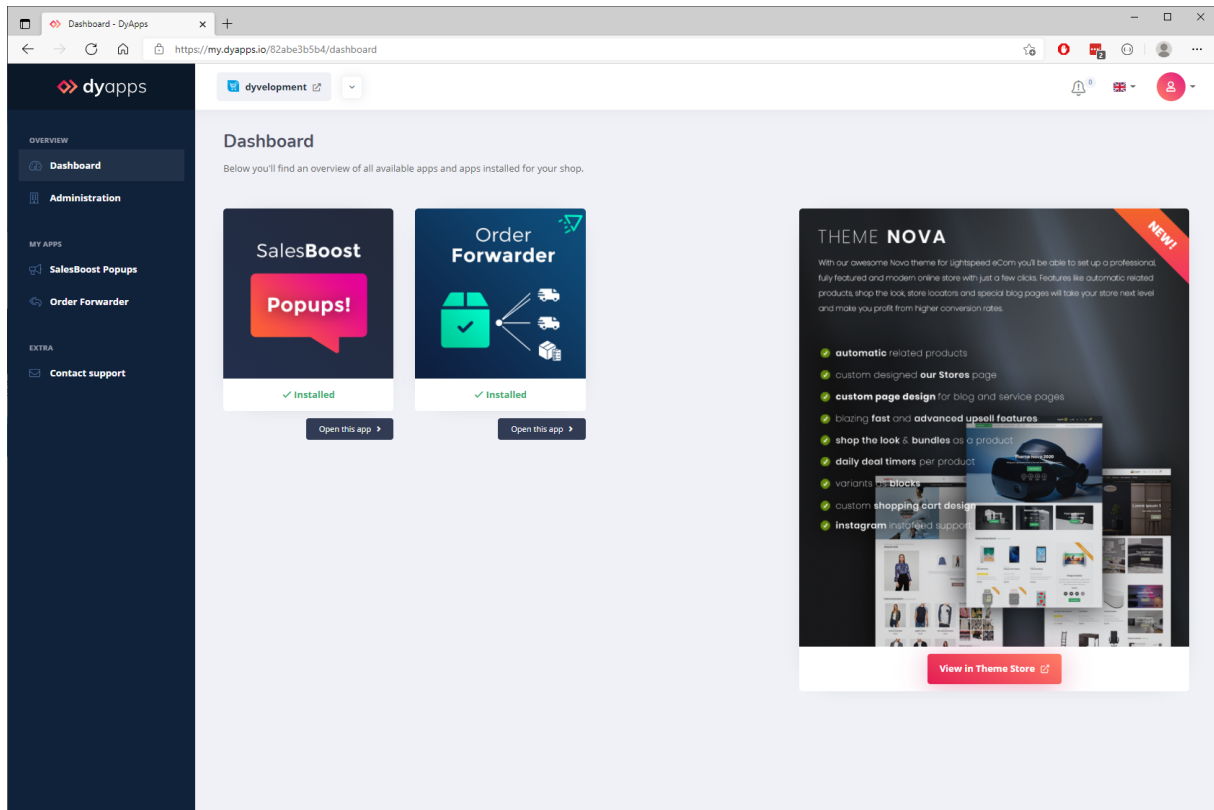
Logging in for the first time?

When you log in for the first time you'll be redirected to an overview page which contains a list of all shops connected to your DyApps account. With the button **Manage apps** you can manage the apps for that specific shop. Clicking this button will load the Dashboard for that shop.

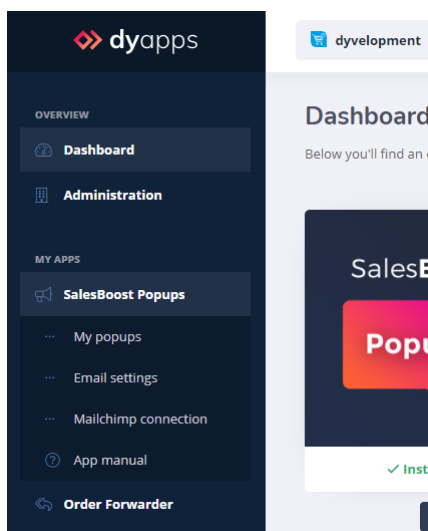


3. Dashboard

The Dashboard is the central area which you'll be redirected to after you've logged in to your DyApps account. The Dashboard contains an overview of both available and your installed apps, and is the place to start for managing your apps.

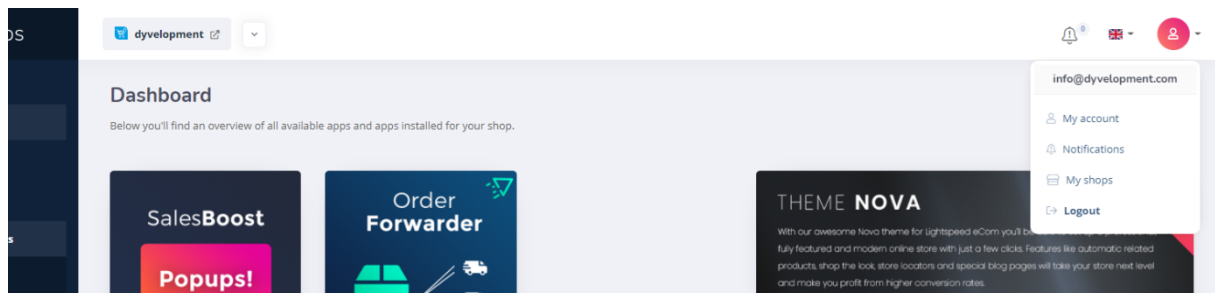


3.1 Your apps



On the left you'll find the navigation bar from which you can open and manage your apps. When you click the app's name it will show you all available options for the app. Of course you'll also find a link to this manual.

3.2 Your account and shops



At the top of the page you'll find the information and navigation bar that applies to your account and shops. On the left side you'll see the shop you're currently logged into and a dropdown to switch stores if you have multiple stores connected to your account.

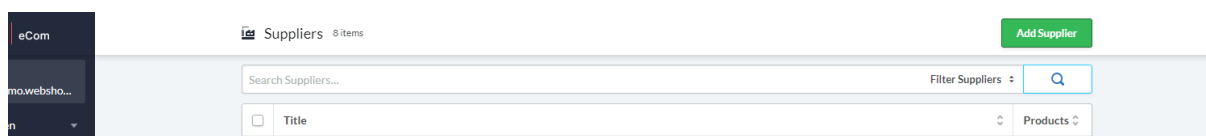
With the user icon at the right hand side you can log out and view the shops overview page as described at page 5. From this **My Shops** page you'll find a full overview of all shops that are connected to your account.

4. Connect a supplier to the products in your store

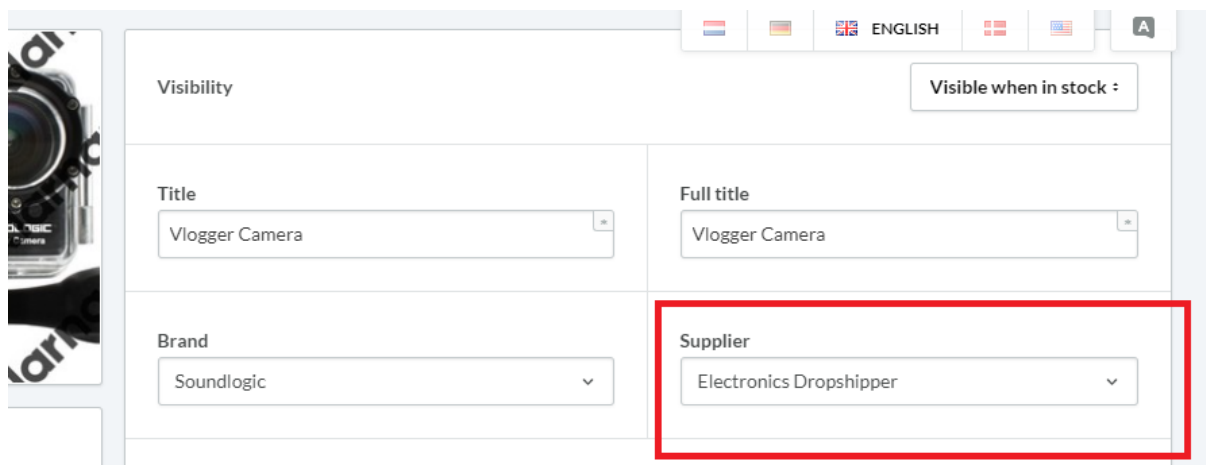
For the app to be able to determine which email address to send ordered products to, it will look up the supplier that is connected to the product in your store. You've probably already connected the products to a supplier, but if you haven't yet, you can easily create and connect suppliers from your store's backoffice.

4.1 For Lightspeed eCom stores

To create your suppliers, you can browse to **Backoffice** > **Products** > **Suppliers** and click the top right button that is labeled *Add supplier*. In this form you can enter a variety of details, but only the supplier's name is a mandatory field. Other details, like the address, are not used by the app.



Next you can simply edit any product of choice and set your preferred supplier in the **Supplier** input field. Don't forget to save the product.



4.2 For CCV Shop stores

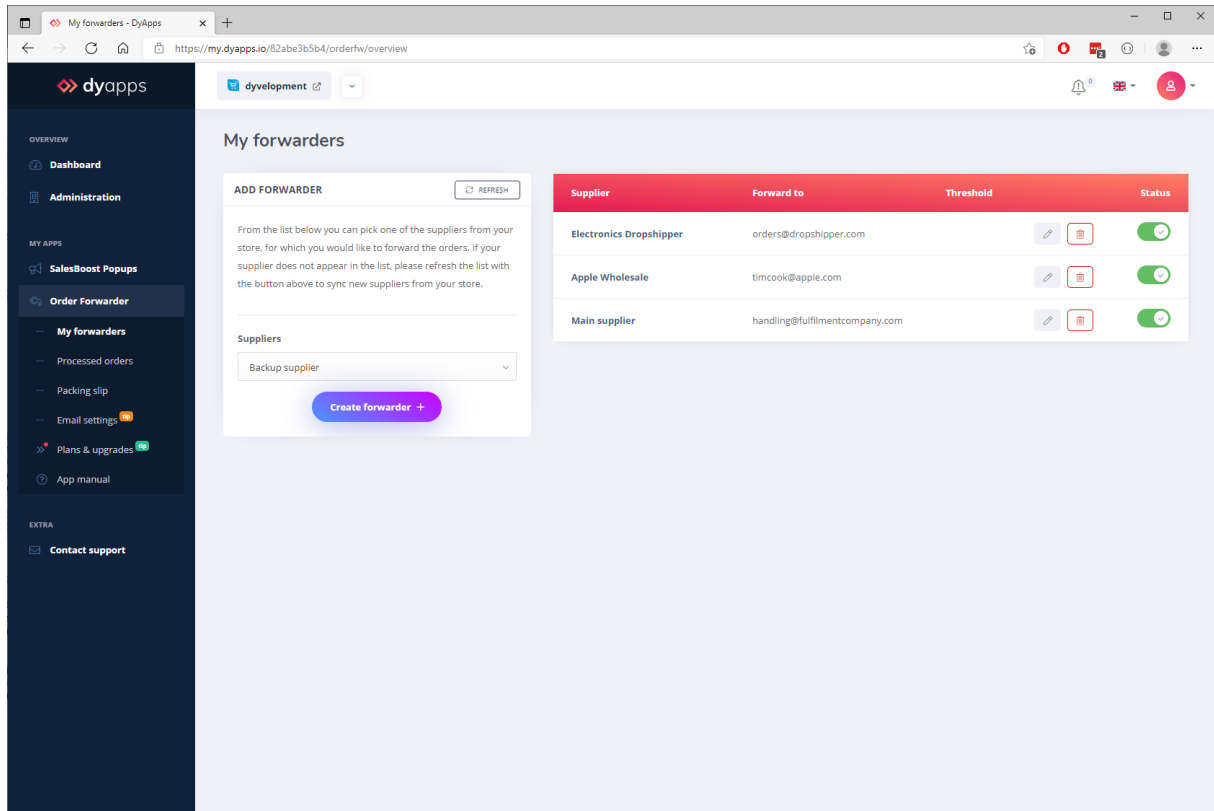
In CCV Shop your suppliers are managed from within the products themselves. To create and/or attach a supplier to a product, browse to **My products > Manage products** from your store's admin area and edit a product of your choice.

Under the **Stock** tab, you can set your preferred supplier at the **Supplier** field, or first create a new supplier if needed. Note that you can of course use the app, even if you don't enter stock levels or have 'item has stock' disabled. When you're done, don't forget to save the product.

The screenshot shows the 'Stock' management interface for a product. On the left is a sidebar with navigation links: 'products', 'product management', 'category management', 'attribute sets', 'products recycle bin', and 'product properties'. The main content area has a breadcrumb trail: '← Back Starting point > My products > Product management' and a title 'Single Attribute product A'. Below this is a tabbed interface with tabs: 'Global', 'Category', 'Price', 'Media', 'Stock' (selected), 'Attributes', 'Links', 'Options', 'Properties', 'Metadata', and 'SEO'. The 'Stock' tab contains a section titled 'Stock' with a description: 'In this tab page you determine how the stock for the product should be arranged. In stock type you indicate where you want to determine the stock when your product has attributes. This can be for the product as a whole or per attribute combination. The latter can be set in the attributes.' There is a checkbox 'Product has stock' which is currently unchecked. Below this is a 'Default delivery' section with a dropdown menu. The dropdown is open, showing a list of suppliers: 'Electronics Dropshipper', 'Apple Wholesale', and 'Backup supplier'. The 'Supplier' field in the dropdown is highlighted with a red box. A red box also highlights a blue '+' button in the top right corner of the dropdown menu, indicating the option to add a new supplier. At the bottom of the dropdown are 'ERASE' and 'OK' buttons.

5. Creating and setting up forwarders

Through the navigation item **My forwarders** you'll find an overview containing all created forwarders. From here you can also easily create a new forwarder for any supplier from your store.



The screenshot displays the 'My forwarders' page in the DyApps interface. The left sidebar contains navigation links under 'OVERVIEW' (Dashboard, Administration), 'MY APPS' (SalesBoost Popups, Order Forwarder, My forwarders, Processed orders, Packing slip, Email settings, Plans & upgrades, App manual), and 'EXTRA' (Contact support). The main content area is titled 'My forwarders' and features an 'ADD FORWARDER' section with a 'REFRESH' button and a 'Suppliers' dropdown menu. Below this is a 'Create forwarder' button. To the right is a table listing existing forwarders with columns for Supplier, Forward to, Threshold, and Status.

Supplier	Forward to	Threshold	Status
Electronics Dropshipper	orders@dropshipper.com		On
Apple Wholesale	timcook@apple.com		On
Main supplier	handling@fulfilmentcompany.com		On

Please note that when you add new suppliers to your store, you'll first have to refresh the list in the app with the button above.

5.1 Creating your first forwarder

The screenshot shows the 'Edit forwarder' interface for 'Apple Wholesale'. The left sidebar contains navigation options like 'Dashboard', 'Administration', 'My Apps', 'SalesBoost Popups', 'Order Forwarder' (selected), 'My forwarders', 'Processed orders', 'Packing slip', 'Email settings', 'Plans & upgrades', 'App manual', and 'Extra/Contact support'. The main area has a top bar with 'Back' and 'Save' buttons. Below are two settings panels: 'EMAIL SETTINGS' with a 'Forward to email address' field (timcook@apple.com) and an 'Attach packing slip' toggle; and 'STOCK THRESHOLD' with an 'Enable threshold' toggle, a 'Stock level threshold' field (0), and an 'Amount of quantity to forward' dropdown (Forward full ordered quantity). On the right is a large visual email editor showing a preview of an email template. The template includes a subject line 'Order {{ order.number }}', a greeting 'Dear sir/madam,', and a message 'Below you'll find the order placed by our customer:'. Below this is a table with 'Customer details' and 'Shipping details'. The 'Customer details' table has rows for Name, Phone, Mobile, and Email, each with a corresponding variable like {{ customer.name }}. The 'Shipping details' table has rows for Name, Address, Address (2), Zip code, City, Region, and Country, each with a corresponding variable like {{ address.shipping.name }}. At the bottom of the preview is an 'Optional customer comment:' field. A 'Show all available variables' link is at the bottom right of the editor.

When you've picked a supplier from the list and pressed the **Create forwarder** button, you'll be redirected to the *Edit forwarder* page, where you can set up the details for this forwarder.

At the top left you can set the recipient's email address. Orders that contain products from this supplier, will be sent to this email address.

1. Email template

On the right hand side you'll find the visual editor which you can use to customize the email body that's sent to the supplier. In our default template you'll basically only have change the company details at the bottom to your own; we already did all the hard technical programming work for you!

Use of variables

To fill the email body with the dynamically generated order details, there are so called *variables* being used. These variables will be replaced with specific order detail values when the email is being generated and sent. You can identify a variable with two opening and two ending curly braces: {{ and }}. Within these braces the specific variable's name is set; every variable is replaced with a different piece of data. Most variables will speak for themselves, but for a full overview of available variables you can press the **Show all available variables** button.

Customizing the mail template's visual appearance or technical code

To make it easy for you we've already developed the default email template for you. When you'd like to customize the look and feel in detail however, technical knowledge of HTML and CSS is required. Dyvelopment unfortunately cannot provide support on customizing your email template.

Tip: more detailed information about email templates, including examples can be found on this page: <https://www.mailgun.com/blog/transactional-html-email-templates/>.

5.2 Attaching packing slip

Depending on the app plan you've picked, you can choose to add a packing slip PDF as attachment for this forwarder. Through the navigation item **Configure packing slip**, you can set your company logo and details that will be displayed in this slip. Note that a packing slip contains **all** products that were ordered: including products that are not connected to the supplier.

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5.3 Setting stock threshold level

Depending on the app plan you've picked, you can choose to set up a stock level threshold which will prevent ordered products from being forwarded if their stock level is above the threshold. Note that this setting is optional. When leaving this setting disabled, the full ordered quantity is always forwarded.

To determine if a product's stock level gets below the threshold, it will look up the product's stock level in your store **after** the purchase. This means the quantity of the current paid order, is already subtracted from the product's stock level in your store.

Note: the product's stock level will be determined at the time of processing the order by the app. There is some delay between the ordering/payment by the customer, and the processing by the app. This means the calculated stock level (depending on your order volumes) is an approximation.

Determining the amount of ordered product quantity to forward

Forward full ordered quantity

When a product's stock level (just) gets below your set threshold value, the full ordered product quantity will be forwarded.

Example: say the customer ordered 10 items of Product A, the stock level was 5 but after this purchase now is -5, and your set threshold is 0. This means the product's stock level is lower than your threshold, and it will be forwarded as all "10 items".

Only forward quantity below the stock threshold

This means that when a product's stock level gets below the threshold, only the quantity below the threshold will be forwarded.

Using the previous example: say the customer orders 10 items, your threshold is 0, and before the purchase you had 5 items left in stock. This means you will ship/process these 5 items yourself, and the remaining 5 items will be forwarded by the app.

5.4 Forwarding the orders and testing the app

Now you've successfully created a forwarder, all paid orders containing products with a supplier that belongs to the forwarder, will now automatically be forwarded. Through the navigation item **Processed orders** you'll later find an overview of all orders and products processed by the app, and to which forwarder they were sent. More information about the sender name and other email settings can be found on page 16.

To play around, do some testing, and to see for yourself how this forwarding works and looks like, you can simply set your own email address in a created forwarder. Then from your store, you can place some (test) orders with products that belong to this supplier/forwarder. Don't forget to set the order as 'paid' to make sure the app will process your order.

Exclusions

To prevent double sending orders, the app will not (and cannot) process a previously sent order.

When a credit invoice is connected to the order, or when one of the ordered items is refunded or returned, the complete order will be excluded from processing.

6. Email sender details and email settings

By default, all emails will be sent from *no-reply@email.dyapps.io* with sender name *DyApps*. To gain more control on the email delivery process we highly encourage you to use your own mail server for sending emails. This way emails will really be sent with your own name.

Browsing to the navigation item **Email settings** you'll find all input fields required to connect to your mailserver. You'll need to enter your **mail server's SMTP settings (sometimes called outgoing or outbound server)** as provided by your email hosting provider.

The screenshot shows the 'Custom mailserver' configuration page in the DyApps dashboard. The page has a dark sidebar on the left with navigation links: Overview, Dashboard, Administration, My Apps (SalesBoost Popups, Order Forwarder, My forwarders, Processed orders, Packing slip, Email settings, Plans & upgrades, App manual), and Extra (Contact support). The main content area is titled 'Custom mailserver' and contains a 'SERVER SETTINGS' form. The form includes a 'SAVE' button with a checkmark. It has two informational boxes: a blue one stating that emails are sent from no-reply@email.dyapps.io by default and a yellow one advising to contact the email hosting provider for questions. A toggle switch for 'Use my own mailserver' is turned on. The form fields are: Sender name (Your Online Store), Sender email (info@youronline.store), Email server (mail.youronline.store), Server port (empty), Username (info@youronline.store), Password (masked with asterisks), and Encryption (None (plain SMTP connection)).

Tip: in general you can enter the same details as those needed to configure the email app on your phone or desktop. The fields **Sender name** and **Sender email address** will be shown when the recipient views the email; most of the time you can enter any name or address you like. The email address usually is the same as the mail server's username.

Because the mail server is a 3rd party service, Dydevelopment is unfortunately not able to support you in setting up this feature. For more information and support you can reach out to your email hosting provider's support department, as they will be able to tell you which settings you'll need. To help you get started though, we've included a list to the corresponding knowledge base articles of some popular email services.

6.1 Outgoing (SMTP) server details for frequently used email services

Google / G Suite

<https://support.google.com/mail/answer/7126229?hl=en>

Microsoft / Office 365

<https://support.microsoft.com/en-us/office/pop-imap-and-smtp-settings-8361e398-8af4-4e97-b147-6c6c4ac95353>

TransIP

<https://www.transip.eu/knowledgebase/entry/309-the-email-settings-at-transip/>

Hostnet

<https://helpdesk.hostnet.nl/hc/nl-nl/articles/360015888678-Mijn-e-mailprogramma-vraagt-om-een-uitgaande-mailserver-welke-is-dit->

One.com

<https://help.one.com/hc/en-us/articles/115005594305-Can-I-use-your-SMTP-server-to-send-emails->

Yourhosting.nl

<https://www.yourhosting.nl/e-mail-hosting/secure-smtp/>

Mijndomein.nl

<https://helpdesk.mijndomein.nl/hc/nl/articles/200460232-Joomla-e-mail-instellingen>

Combell

<https://www.combell.com/nl/help/kb/hoe-kan-ik-mijn-basic-mailbox-pop3-imap-instellen/>

7. Setting up packing slip

The screenshot shows a web browser window with the URL `https://my.dyapps.io/82abe3b5b4/orderfw/slip`. The page is titled "Configure packing slip". On the left is a dark sidebar with a navigation menu. The main content area contains a form for configuring packing slip settings.

Navigation Menu (Left Sidebar):

- OVERVIEW
 - Dashboard
 - Administration
- MY APPS
 - SalesBoost Popups
 - Order Forwarder
 - My forwarders
 - Processed orders
 - Packing slip**
 - Email settings
 - Plans & upgrades
 - App manual
- EXTRA
 - Contact support

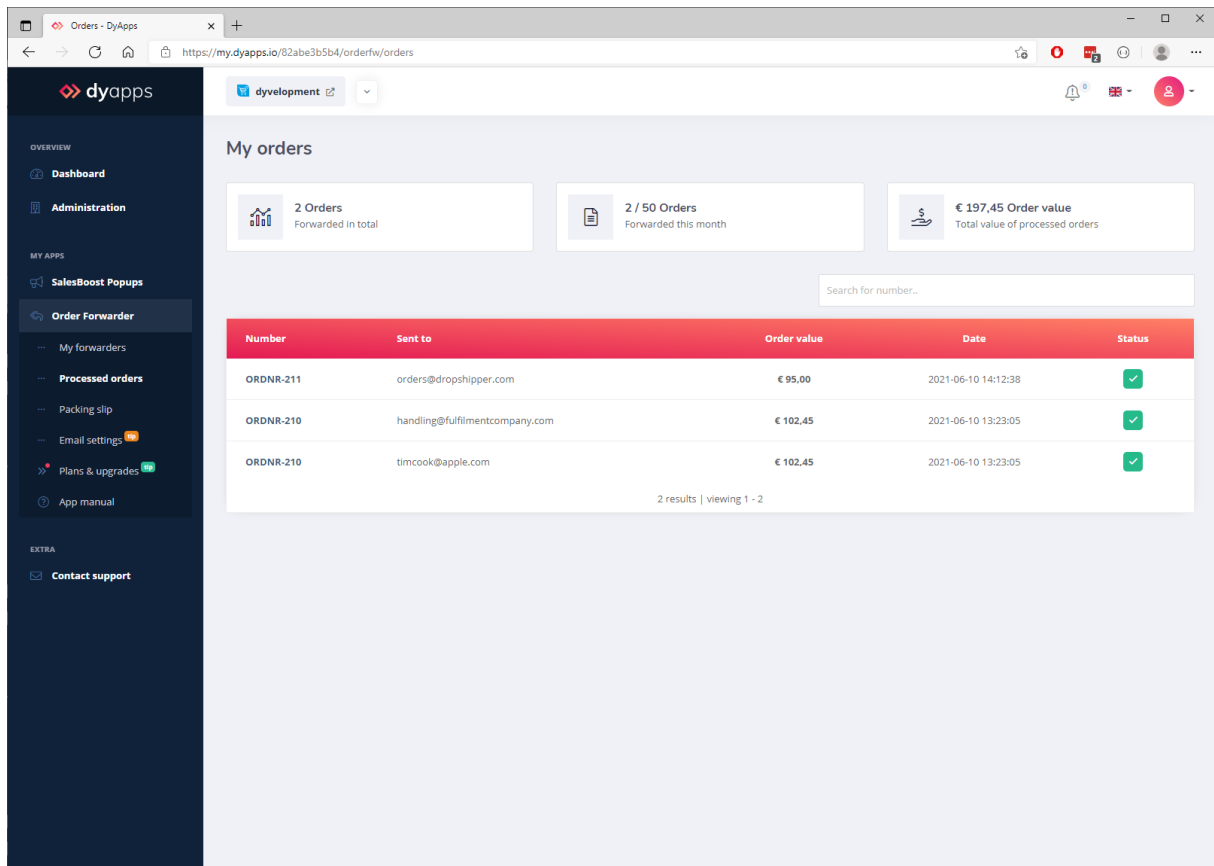
Configure packing slip Form:

- Logo:** A dashed box with the text "Drop your logo file here (.jpg or .png and max. 1MB)". The DyApps logo is currently displayed.
- Company name:** A text input field containing "DyApps Ltd." with a small icon to its right.
- Address:** A text input field containing "Ecommerce avenue".
- Zip code:** A text input field containing "1234 AB".
- City:** A text input field containing "Amsterdam".
- Country:** A text input field containing "Nederland".
- Buttons:** At the bottom right of the form are two buttons: a red "Save" button with a checkmark icon and a "Preview" button with a document icon.

Depending on the app plan you've picked, you can choose to automatically add a packing slip PDF for a specific forwarder. Through the navigation item **Packing slip settings** you'll be able to set up your logo and company details, which will be shown on the packing slip.

When pressing the **Preview** button, a new window will open to show you how the slip looks like, filled with some dummy product data.

8. Overview processed orders and product details



The screenshot displays the 'My orders' section of the DyApps interface. The left sidebar contains navigation links: Overview, Dashboard, Administration, My Apps, SalesBoost Popups, Order Forwarder, My forwarders, Processed orders (highlighted), Packing slip, Email settings, Plans & upgrades, App manual, EXTRA, and Contact support. The main content area shows three summary cards: '2 Orders Forwarded in total', '2 / 50 Orders Forwarded this month', and '€ 197,45 Order value Total value of processed orders'. Below these is a search bar and a table of orders.

Number	Sent to	Order value	Date	Status
ORDNR-211	orders@dropshipper.com	€ 95,00	2021-06-10 14:12:38	✓
ORDNR-210	handling@fulfilmentcompany.com	€ 102,45	2021-06-10 13:23:05	✓
ORDNR-210	timcook@apple.com	€ 102,45	2021-06-10 13:23:05	✓

2 results | viewing 1 - 2

Through the navigation item **Processed orders**, you'll find a full overview of all orders which were processed and forwarded by the app. Here you'll also find the amount of orders which were sent this month and what the total (cumulative) order processing value was during the use of the app.

Monthly sent orders

The amount of monthly sent orders included in your selected app plan is determined based on unique order numbers. This means that when an order was split across multiple suppliers/forwarders (and there were sent three emails for example), the app will only see this as one processed order.

Total order processed value

The total order processed value is based on the order's full turnover amount, this way you'll know what the total order value has been.

8.1 Processed orders

When an order meets all you configured criteria at the time of processing by the app (meaning there's an active forwarder for at least one of the ordered products, and the product's stock level also meets your optional threshold setting) the order record will be saved and shown in this overview table. Can't find an order in this overview? Then the order has not yet been paid, or there are no products available in the order that have a supplier which is connected to a forwarder, or (optionally) the stock levels at time of processing did not meet your set threshold.

Order value

The column order value is based on the total value of the order, independent of suppliers or forwarders.

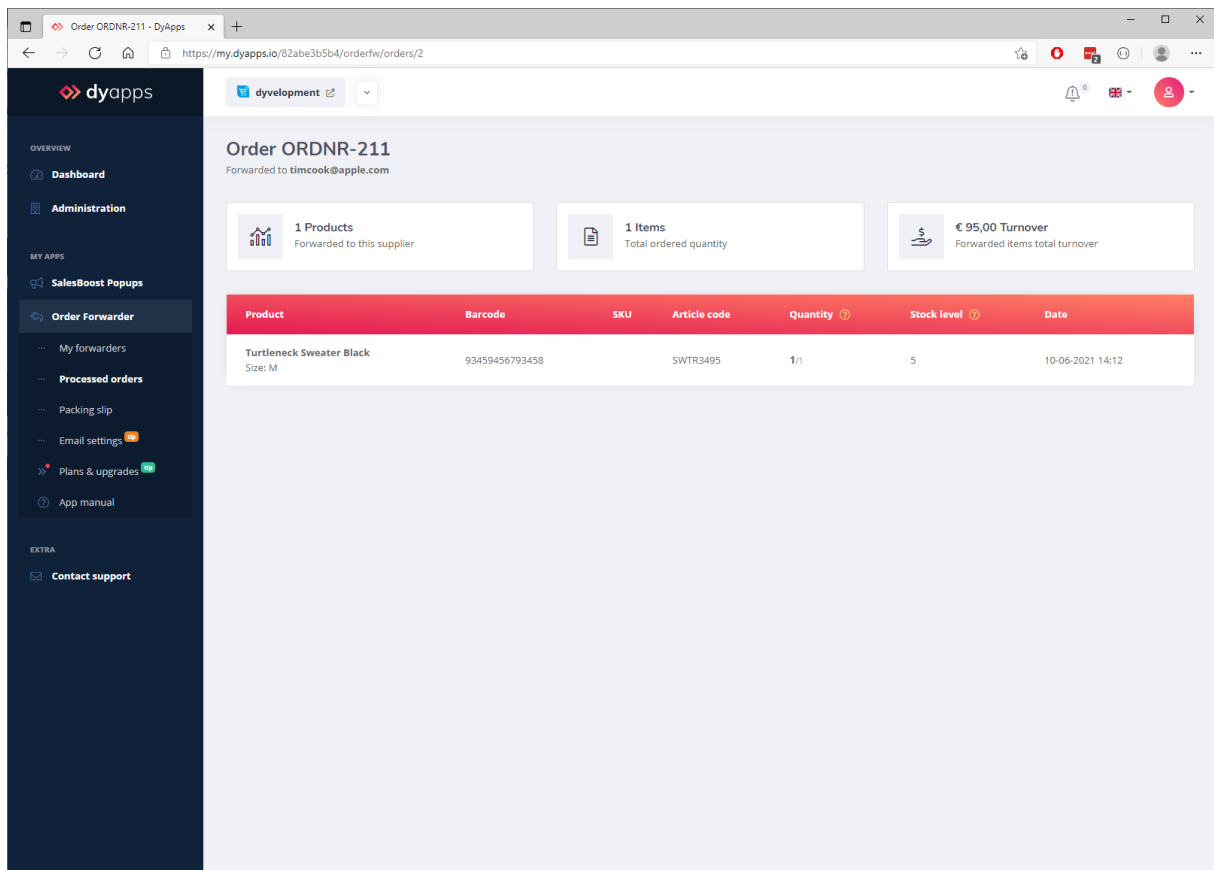
Date

This is the date time at which the app has processed the order. Note that this is not exactly the same as the order creation date in your store.

Status

When the order was sent successfully, a green checkmark icon will be shown in the *Status* column. If for some reason sending the email has failed (e.g. when your store's web server or your mail server was offline for a moment), a retry button will appear. With this retry button you can retry sending the order for up to three times. When your first retry failed as well, we'd advice you to wait at least a few hours or a day before retrying again, as the problem causing the issue may not have been resolved yet.

8.2 Order product details

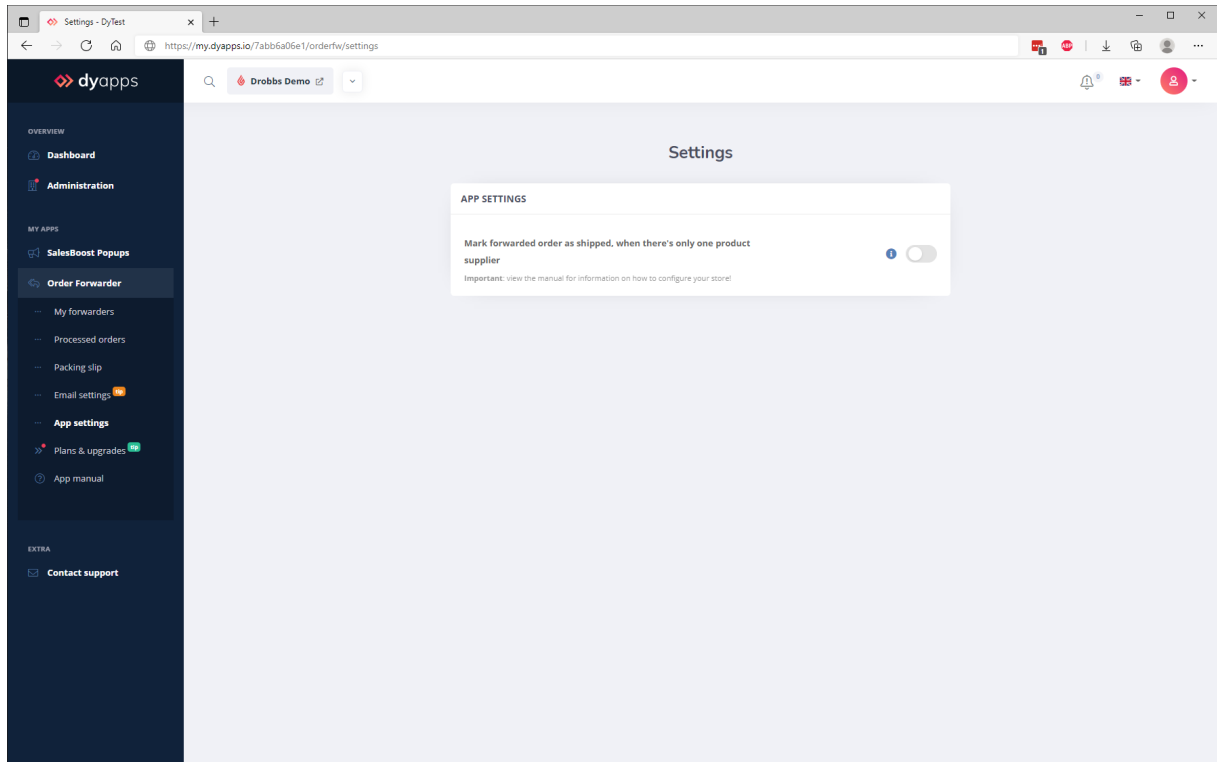


The screenshot shows the 'Order ORDNR-211' details page in the DyApps interface. The page is titled 'Order ORDNR-211' and is forwarded to 'timcook@apple.com'. The main content area displays three summary cards: '1 Products' (Forwarded to this supplier), '1 Items' (Total ordered quantity), and '€ 95,00 Turnover' (Forwarded items total turnover). Below these cards is a table with columns: Product, Barcode, SKU, Article code, Quantity, Stock level, and Date. The table contains one row for 'Turtleneck Sweater Black' (Size: M) with a quantity of 1/1 and a stock level of 5.

Product	Barcode	SKU	Article code	Quantity	Stock level	Date
Turtleneck Sweater Black Size: M	93459456793458		SWTR3495	1/1	5	10-06-2021 14:12

When clicking an order number in the order overview table, you'll be able to see which products were sent to this supplier, and with what quantities. The approximate indication of your item's stock level at the time of processing, can also be found to give you a better understanding on how quantities were calculated when you've decided to enable to stock level threshold setting.

9. App settings



Through the navigation item **App settings** you'll find some optional settings which apply to the app and it's processing in general. Depending on which plan you've picked, not all settings may be available.

9.1 Mark forwarded orders as shipped

When enabling this setting, the whole order will be marked as shipped in your online store; it's not possible to separate partial shipments/orders.

This setting only applies to forwarded orders that contain products from one single supplier, and all belong to that single supplier. Orders that contain products from multiple suppliers, or products that are not connected to a supplier, will not be marked as shipped.

For Lightspeed eCom stores

This feature will only work when invoices are created directly (automatically) in Lightspeed eCom after an order is placed. If needed, you can change this setting in Lightspeed eCom through **Backoffice** > **Settings** > **Administration** under *Invoices*.

The screenshot shows the 'INVOICES' settings section in the Lightspeed eCom Backoffice. The 'Create' dropdown menu is highlighted with a red box, showing options: Direct, Paid, and Manual. The 'Prefix' field is set to INV, and the 'Start' field is set to 0. The 'Hide email & phone number' toggle is turned on. Below the 'INVOICES' section, the 'SHIPMENTS' section is partially visible, showing a 'Prefix' field set to SHIP and a 'Start' field set to 0.

Note: Lightspeed will not send the shipment notification email to the customer, as most suppliers will handle notifications themselves. If you'd prefer to have Lightspeed send the default email notification please feel free to reach out to our support department and discuss possibilities and pricing.