Tryton Sale Channel Documentation

Release VERSION

Openlabs

June 09, 2015

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CHAPTER 1

User Guide

This user guide is meant as a handbook for the users to deploy sales channel system effectively.

1.1 Introduction

Welcome to the Sales Channel Module Documentation. The Sales Channel module introduces a way to segment orders in Tryton based on their source. Some channel types also have the ability to export stock and catalog information in addition to being able to import orders from external channels.

The core module introduces minimal functionalities required for orders to be taken manually from Tryton Sales module for orders placed on offline channels like emails, phones or by your own sales teams.

The sale channel module also provides a way to set optimal defaults for creating orders from different channels. Examples of sale channels are

- Your web store
- Showroom 1
- Showroom 2
- Tradeshow 1

If you have different warehouse, pricelists, payment terms or invoicing methods that change with the channel, you could use this module to make manage all of these easily.

In addition, the sale channel module is also used by other Tryton modules that integrate with external channels like eCommerce systems (shopify, magento) and marketplaces (amazon, ebay).

In this module, we will learn about creating new sales channel and adding records to them.

This documentation assumes that you have the module installed and working in your Tryton database.

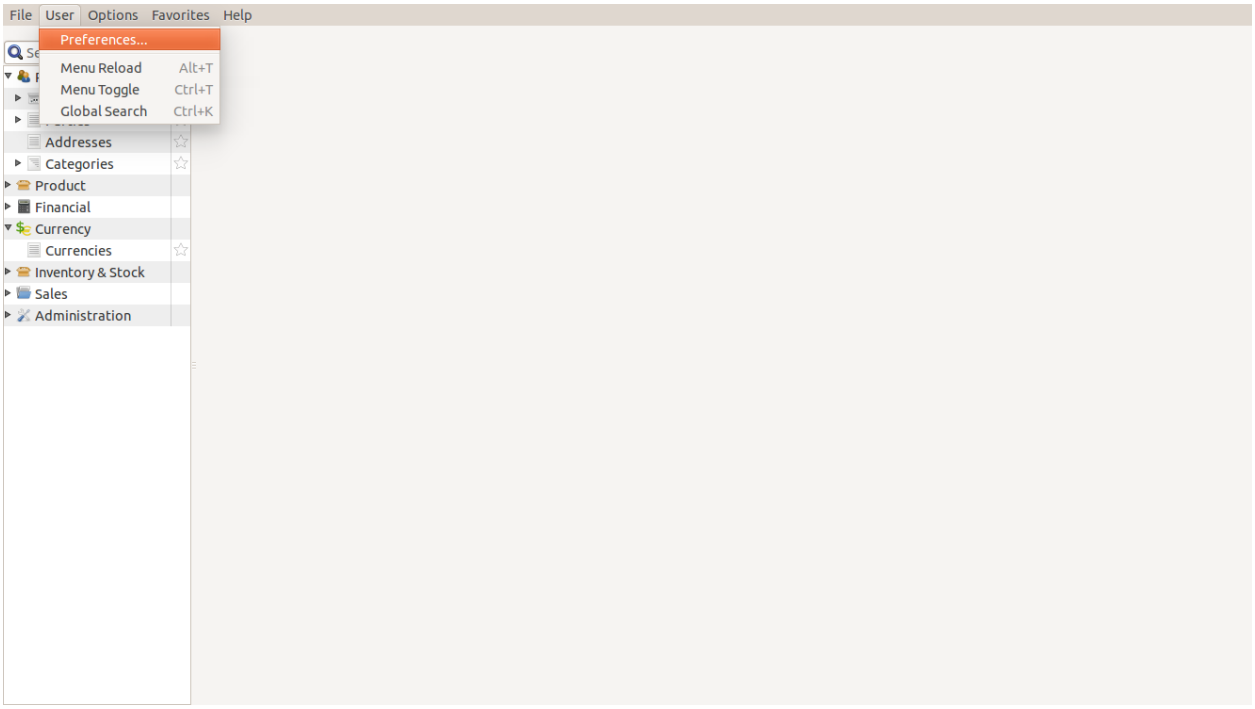
1.2 Sales Channel

This guide will give you detailed description of all the fields in the sale channel module and how sale channel module works.

1.2.1 Initial Steps

When you login into tryton, you can either create a new sales channel or work on channels already installed.

To work on already installed channels, go to `User >> Preferences`.



Click on Preferences and a new window will pop up.

It will show the default user logged in with password, name, company and other fields.

Click on Preferences and you can see Languages and Current Channel fields.

When you click on Current Channel Field, a drop down menu will display all the sale channels present.

Select a channel and click Ok.

You can see the Sale Channel Name appearing at the top.

Additionally, you can see all the listed sale channels by double clicking Sale Channel in `Sales >> Configuration >> Sale Channel`.

1.3 New Sale Channel

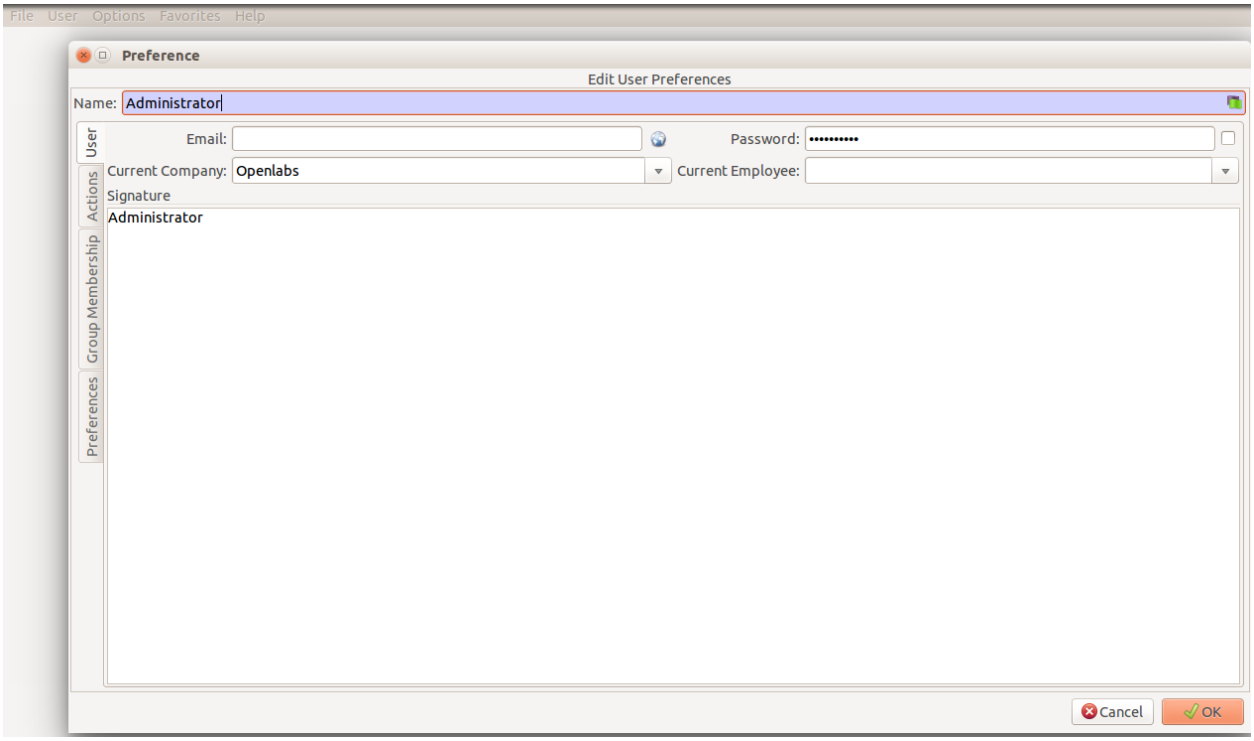
This documentation helps user understand how to create a new sale channel.

1.3.1 New Channel Creation

On the top, click on the `Create a new record` button.

In the window that pops up, you can see a number of fields. These are the fields on New Record Window:

- **Name**: The name of your new sales channel. This field is manadatory.


File User Options Favorites Help
Preference
Edit User Preferences
Name: Administrator
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Password:
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Current Company: Openlabs
Current Employee:
Group Membership
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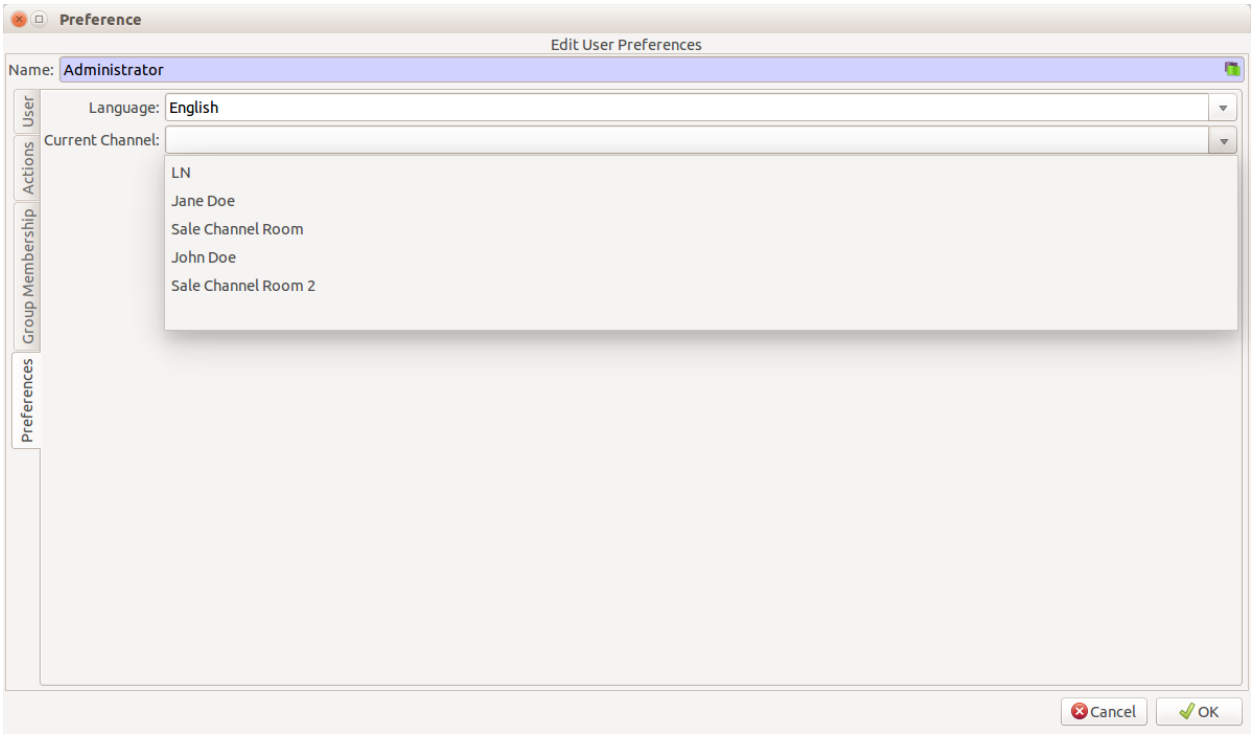
Preferences
Cancel
OK


Preference
Edit User Preferences
Name: Administrator
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Language: English
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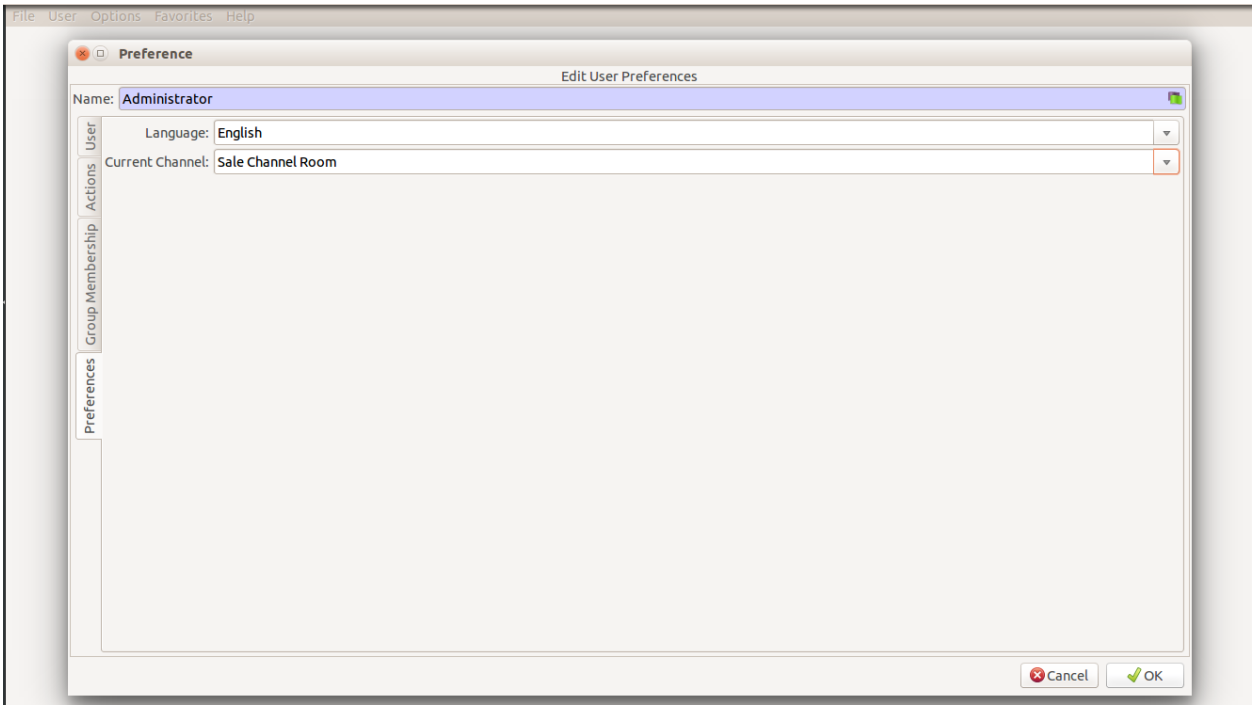
Current Channel:
Group Membership
LN
Jane Doe
Sale Channel Room
John Doe
Sale Channel Room 2
Preferences
Cancel
OK


File User Options Favorites Help
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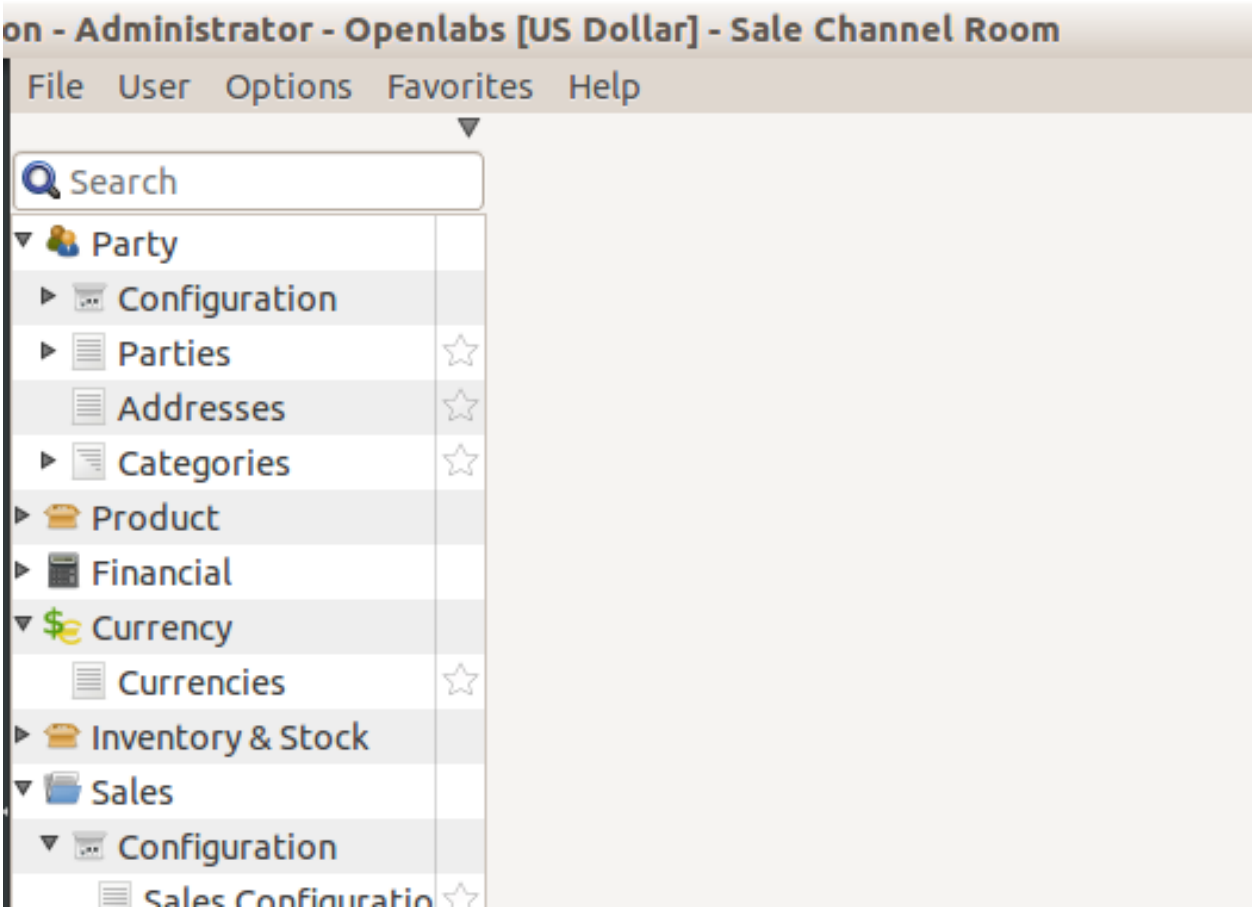
Edit User Preferences
Name: Administrator
User
Actions
Group Membership
Preferences
Language: English
Current Channel: Sale Channel Room
Cancel
OK


on - Administrator - Openlabs [US Dollar] - Sale Channel Room
File User Options Favorites Help
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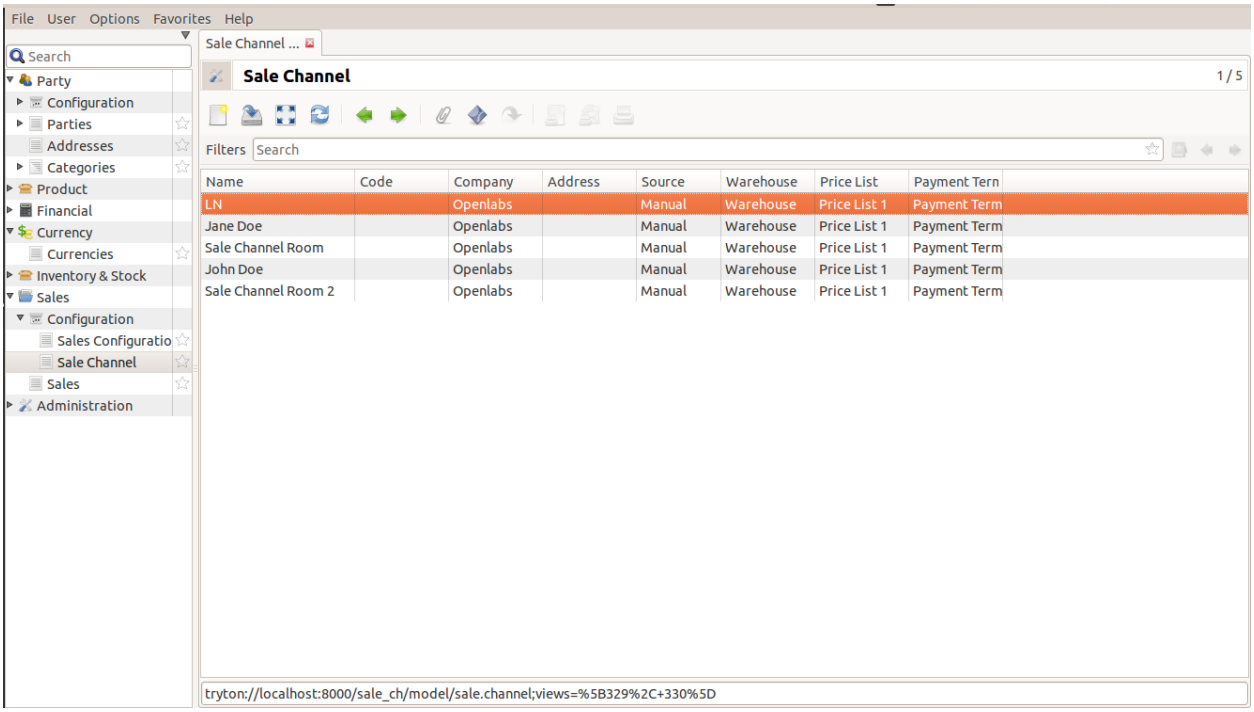
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Sale Channel ...
Sale Channel
1 / 5
Filters
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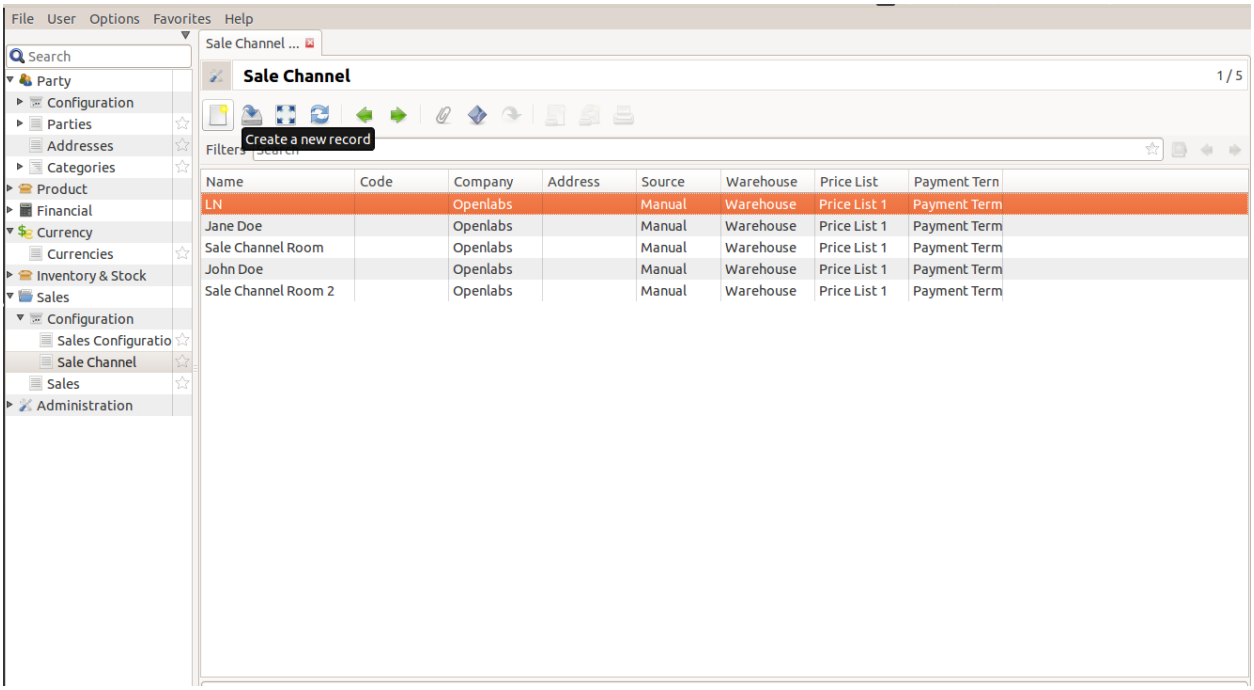
LN Openlabs Manual Warehouse Price List 1 Payment Term
Jane Doe Openlabs Manual Warehouse Price List 1 Payment Term
Sale Channel Room Openlabs Manual Warehouse Price List 1 Payment Term
John Doe Openlabs Manual Warehouse Price List 1 Payment Term
Sale Channel Room 2 Openlabs Manual Warehouse Price List 1 Payment Term
tryton://localhost:8000/sale_ch/model/sale.channel;views=%5B329%2C+330%5D


File User Options Favorites Help
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Sale Channel
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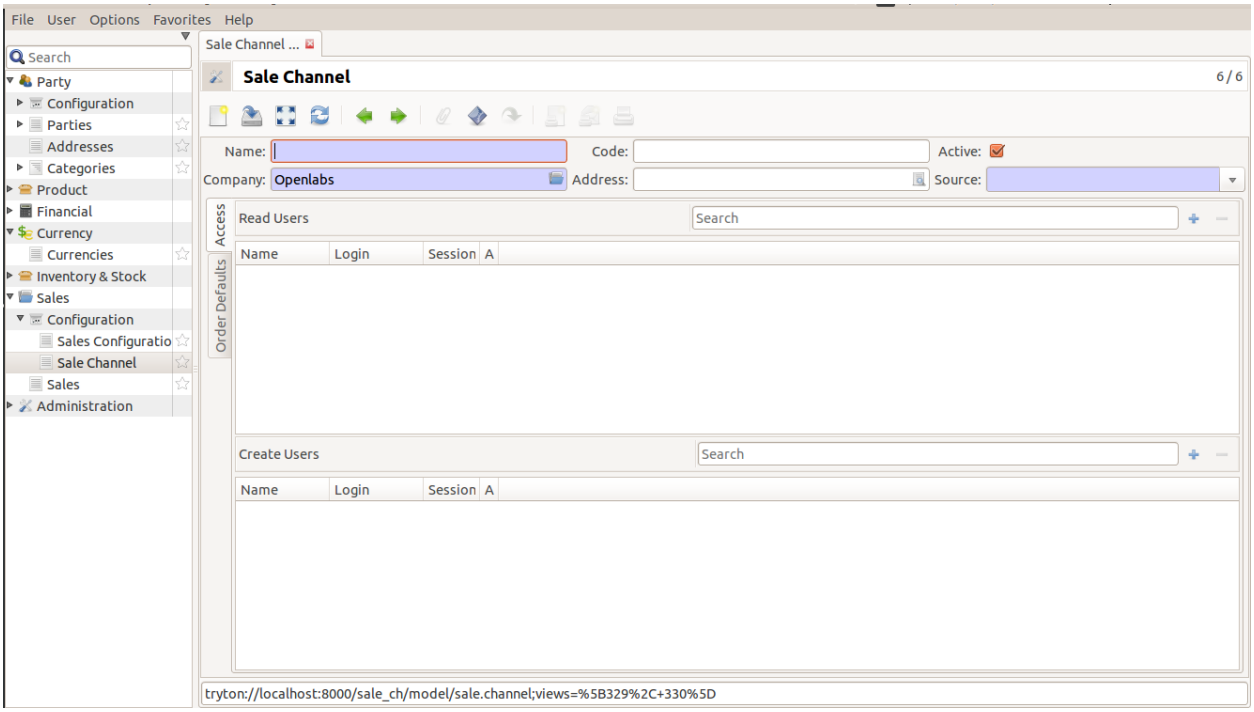
Sale Channel ...
Sale Channel
1 / 5
Create a new record
Filters
Name Code Company Address Source Warehouse Price List Payment Tern
LN Openlabs Manual Warehouse Price List 1 Payment Term
Jane Doe Openlabs Manual Warehouse Price List 1 Payment Term
Sale Channel Room Openlabs Manual Warehouse Price List 1 Payment Term
John Doe Openlabs Manual Warehouse Price List 1 Payment Term
Sale Channel Room 2 Openlabs Manual Warehouse Price List 1 Payment Term

- **Code**: Optional Field to easily lookup channels if you have many.
- **Company**: This is mandatory field to fill. Each channel has to be associated with a company.
- **Address**: If the channel represents a physical location, use the address field to add an address. You can only choose from the addresses of your company. This is optional field.
- **Source**: The source of orders for the channel. The standard module only has a manual option which is used when users key in orders from the Tryton sales modules. Downstream modules implement marketplaces like Amazon and eCommerce channels like Magento and Shopify.



Order Defaults

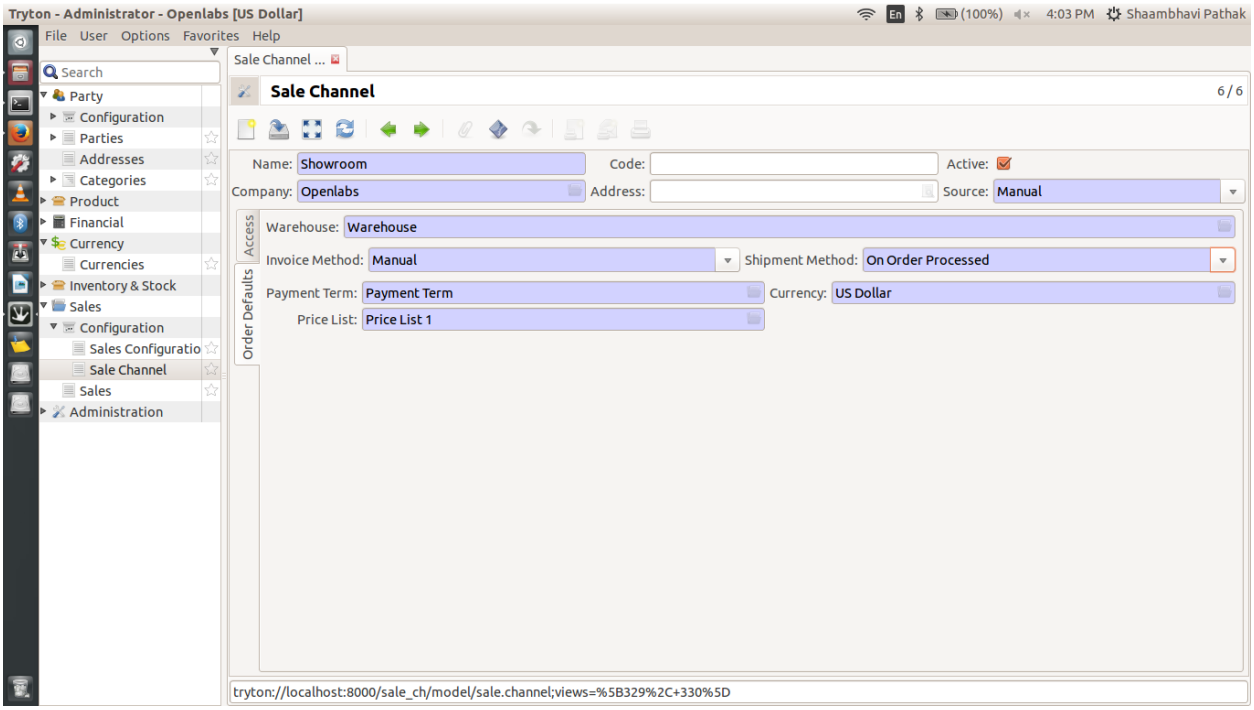
In this section you can set defaults for orders created in the channel. Some fields also perform additional roles. Click on the tab which says `Order Defaults`. The fields are as follows:

- **Warehouse**: The warehouse associated with the channel. All new sale orders created from the channel will use this warehouse as the default warehouse to fulfill from. If the channel exports stock levels to an external application (like Amazon or your eCommerce system), the inventory levels exported are of this warehouse.
- **Invoice Method: This the mandatory field which you use to generate** invoices.
- **Shipment Method**: Contains details for Sales Shipment. This field is also mandatory.
- **Payment Term**: Set payment term to how you want to pay.
- **Currency**: Default currency for orders. (Defaults to company currency)
- **Price List: Every Sale generates price list. You can add the details** here. This field is mandatory.

Once you have filled all these fields, click save this record.

On successful saving, you can see the message, `Records Saved`.

If you switch views now, you will be able to see your newly created channel in the list.


Tryton - Administrator - Openlabs [US Dollar]
(100%) 4:03 PM Shaambhavi Pathak
File User Options Favorites Help
Search
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Sale Channel
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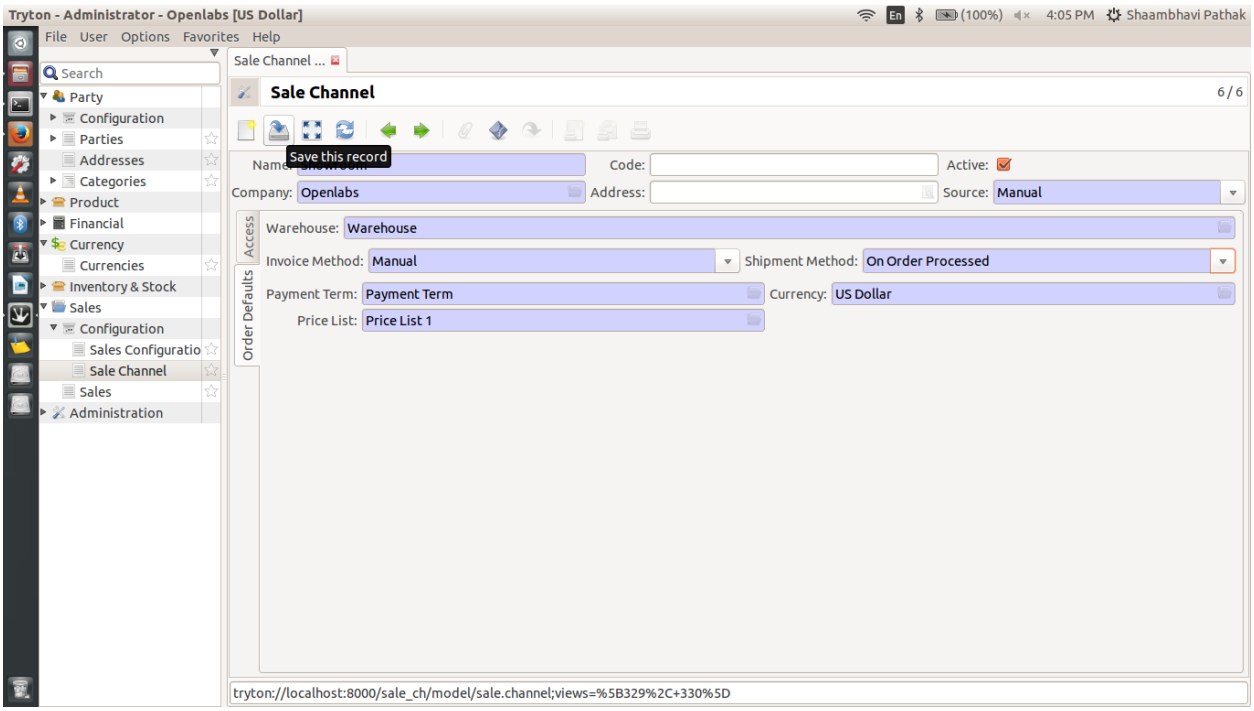
Sale Channel ...
Sale Channel
6 / 6
Name: Showroom
Code:
Active:
Company: Openlabs
Address:
Source: Manual
Access
Order Defaults
Warehouse: Warehouse
Invoice Method: Manual
Shipment Method: On Order Processed
Payment Term: Payment Term
Currency: US Dollar
Price List: Price List 1
tryton://localhost:8000/sale_ch/model/sale.channel;views=%5B329%2C+330%5D


Tryton - Administrator - Openlabs [US Dollar]
(100%) 4:05 PM Shaambhavi Pathak
File User Options Favorites Help
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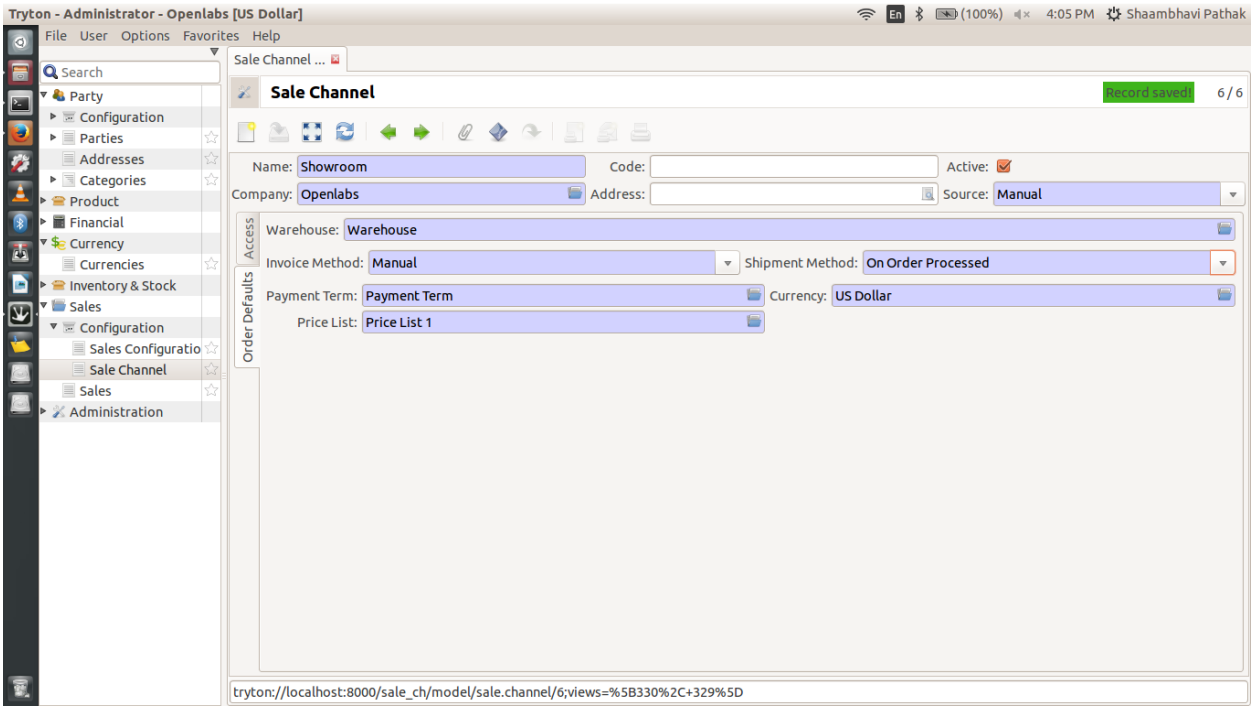
Sale Channel ...
Sale Channel
6 / 6
Save this record
Code:
Active:
Company: Openlabs
Address:
Source: Manual
Access
Order Defaults
Warehouse: Warehouse
Invoice Method: Manual
Shipment Method: On Order Processed
Payment Term: Payment Term
Currency: US Dollar
Price List: Price List 1
tryton://localhost:8000/sale_ch/model/sale.channel;views=%5B329%2C+330%5D


Tryton - Administrator - Openlabs [US Dollar]
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File User Options Favorites Help
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Inventory & Stock
Sales
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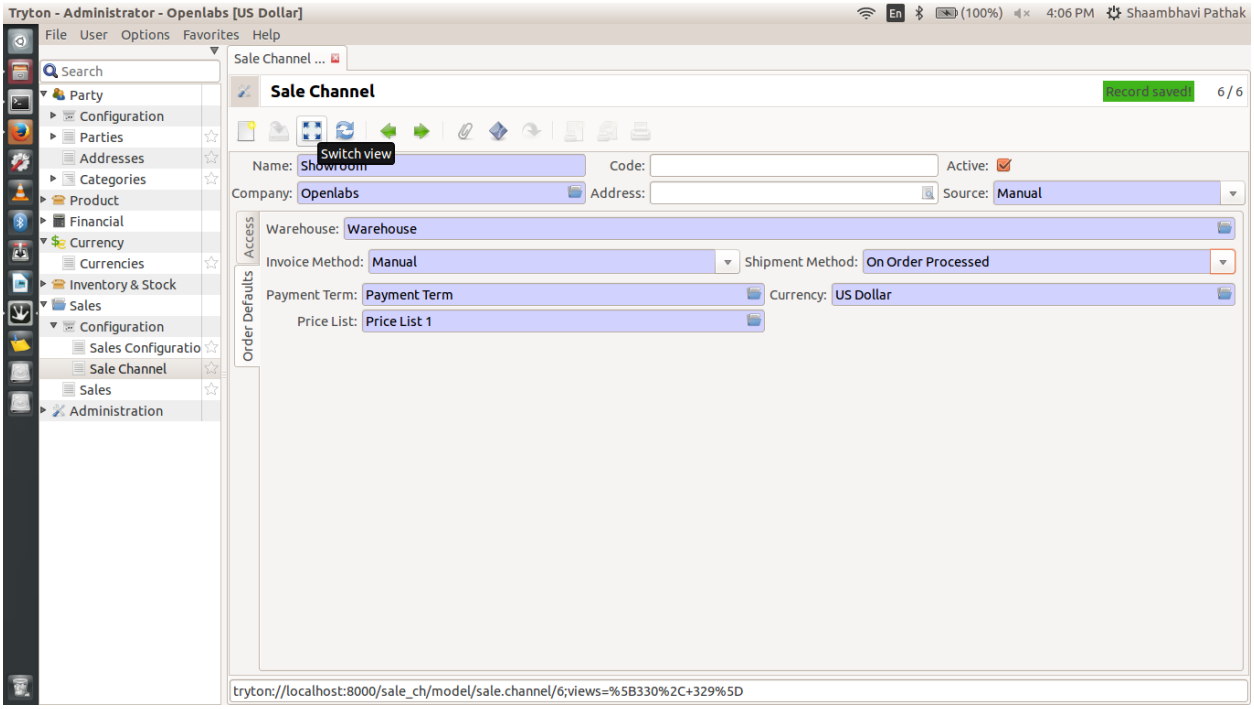
Sale Channel ...
Sale Channel
Record saved!
6 / 6
Name: Showroom
Code:
Active:
Company: Openlabs
Address:
Source: Manual
Access
Order Defaults
Warehouse: Warehouse
Invoice Method: Manual
Shipment Method: On Order Processed
Payment Term: Payment Term
Currency: US Dollar
Price List: Price List 1
tryton://localhost:8000/sale_ch/model/sale.channel/6;views=%5B330%2C+329%5D


Tryton - Administrator - Openlabs [US Dollar]
(100%) 4:06 PM Shaambhavi Pathak
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Sale Channel
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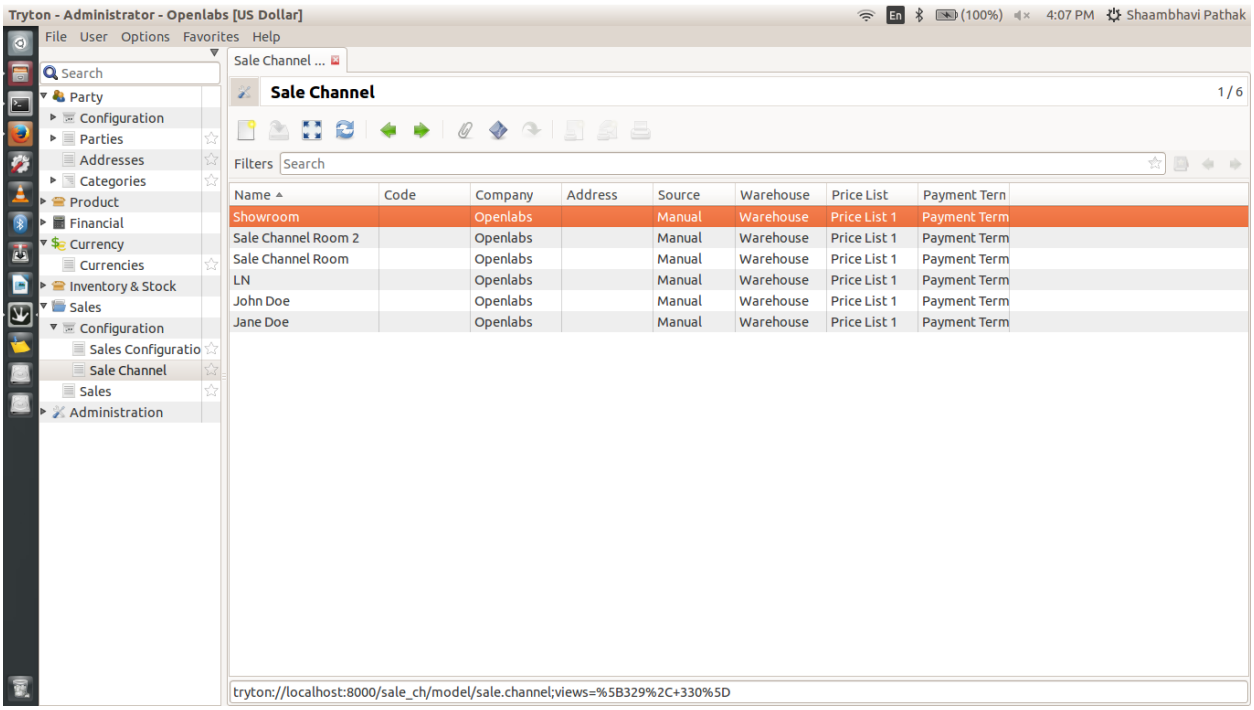
Administration
Sale Channel ...
Sale Channel
Record saved!
6 / 6
Switch view
Name: Showroom
Code:
Active:
Company: Openlabs
Address:
Source: Manual
Access
Order Defaults
Warehouse: Warehouse
Invoice Method: Manual
Shipment Method: On Order Processed
Payment Term: Payment Term
Currency: US Dollar
Price List: Price List 1
tryton://localhost:8000/sale_ch/model/sale.channel/6;views=%5B330%2C+329%5D


Tryton - Administrator - Openlabs [US Dollar]
(100%) 4:07 PM Shaambhavi Pathak
File User Options Favorites Help
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Warehouse
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Sale Channel Room
LN
John Doe
Jane Doe
tryton://localhost:8000/sale_ch/model/sale.channel;views=%5B329%2C+330%5D

CHAPTER 2

Developer's Guide

This guide is meant as a handbook for the developers to extending sales channels for integration modules.

2.1 Extending Channel for Integration Modules

To do...

CHAPTER 3

Indices and tables

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- modindex
- search