User Manual: Octopia Fulfillment APP

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1. Introduction

Manual Objective

The purpose of this manual is to provide a detailed guide for users of the Shopify Shipping Management Application. Here, you will find step-by-step instructions on how to use the five modules within the application, enabling proper configuration and efficient management of shipments and orders.

System Requirements

Before using the application, ensure that you have the following:

- An active Shopify store.
- Internet access and an updated web browser.
- Necessary permissions to install applications on the Shopify store.

2. Onboarding

The Onboarding module will guide you through the initial setup to use the application.

Registration and Initial Setup

1. Download the application from your Shopify admin panel.
2. To complete the registration process, enter the following details:
   - ID Client
   - Client Secret
   - Client Reference
3. Click the "Get in" button to go to shipping country configuration screen
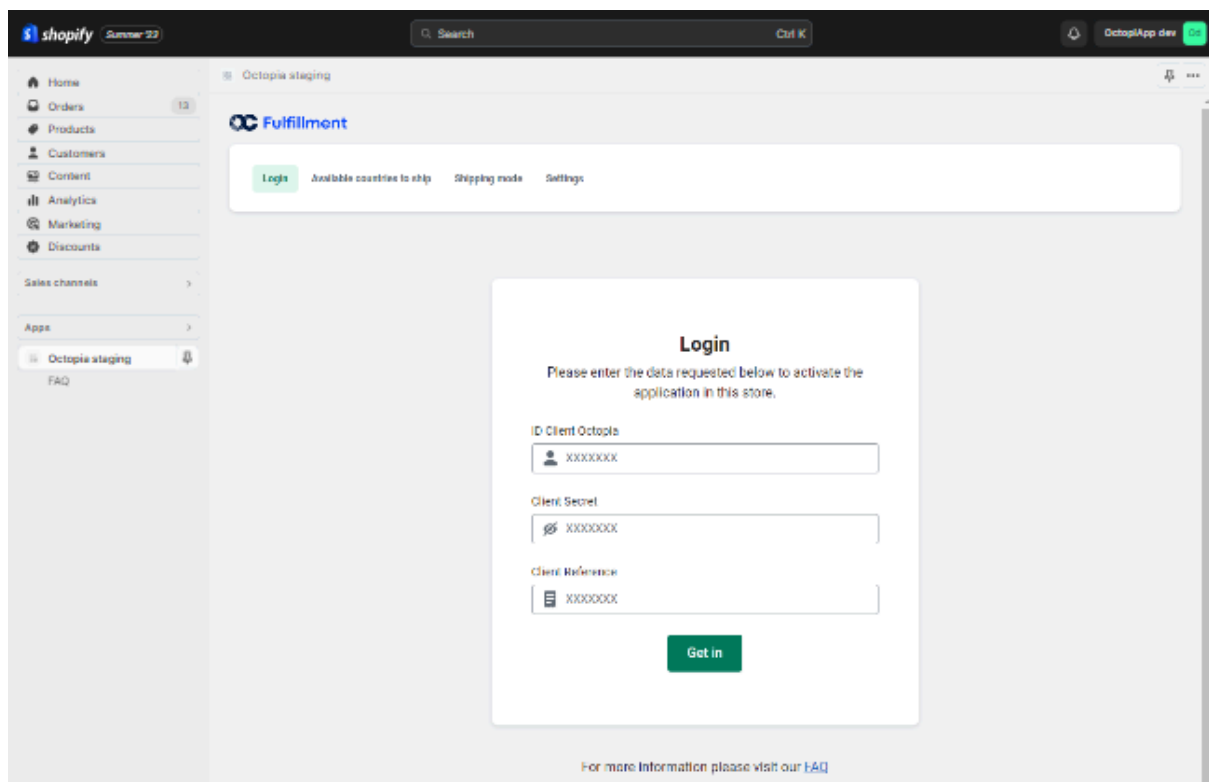
Configuring Shipping Countries

1. On this screen, you will be presented with a list of countries. Select the countries where you want to enable shipping through the application.
2. Confirm your changes by clicking the "Save and Continue" button.
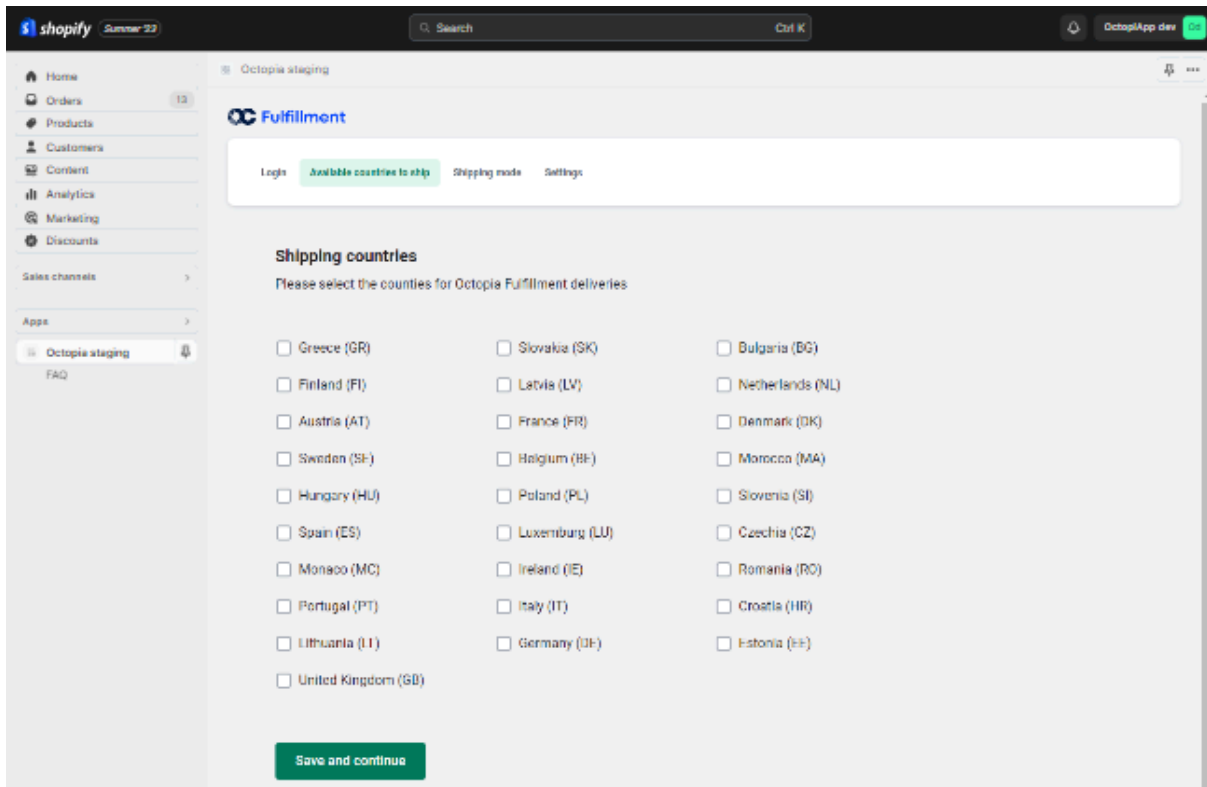
Configuring Shipping Methods

1. On this screen, assign each shipping method configured in Shopify to the corresponding shipping method in our Octopia service.
2. Confirm your changes by clicking the "Save and Continue" button.
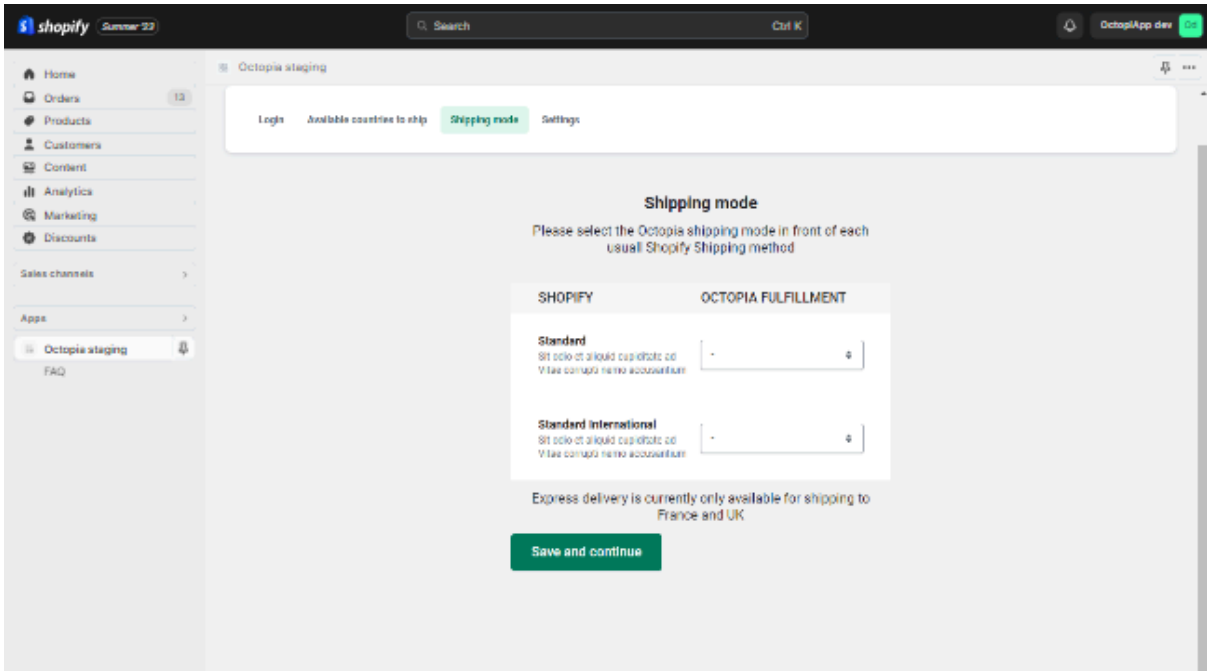
Location configuration

1. In this screen, assign the location you want to use for OctopiaFulfillment storage.
2. Confirm your changes by clicking on the "Save and continue" button.
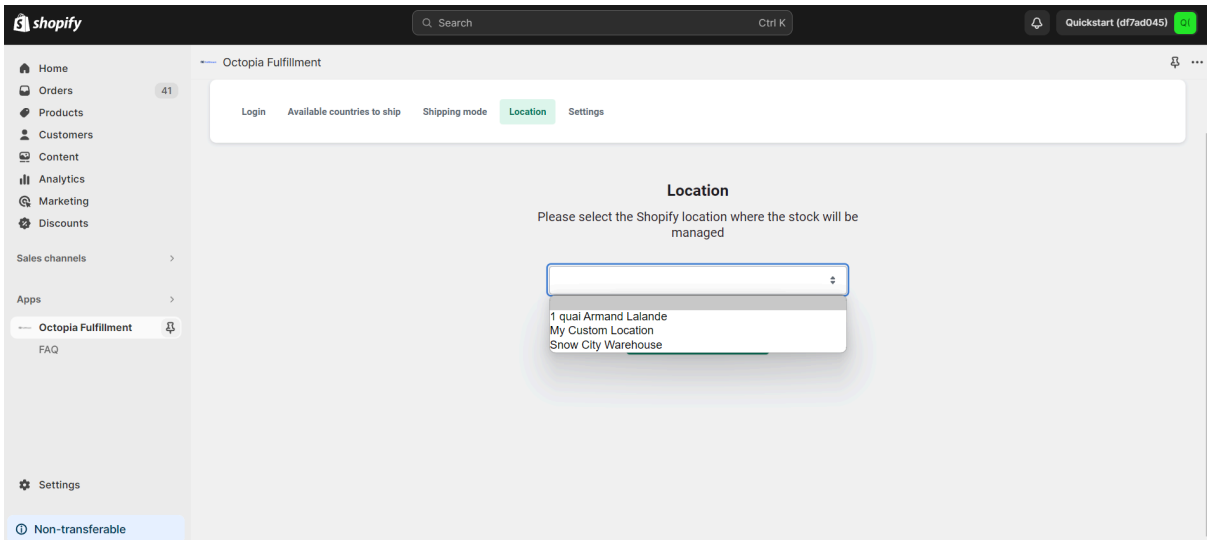
Field configuration for Product_ReferenceID

The **Product_ReferenceID** is a unique identifier for each product and its variant in Octopia. We need this number to know which products are available in Octopia for shipping.

To find the **Product_ReferenceID**, simply follow the instructions provided by your Account Manager from Octopia.

In Shopify, you can store this number in one of the following options (choose only one):

- **SKU field:** This is where you can enter the unique number for each product.
- **Barcode field:** You can also use the barcode of each product to store this identifier.

1. On this screen, select the field that will be used to link the products in your Shopify store with the products stored in our service. You can choose between SKU or BarCode.
2. To complete the configuration, click the "Finalize Setup" button and wait while all your products are synchronized.
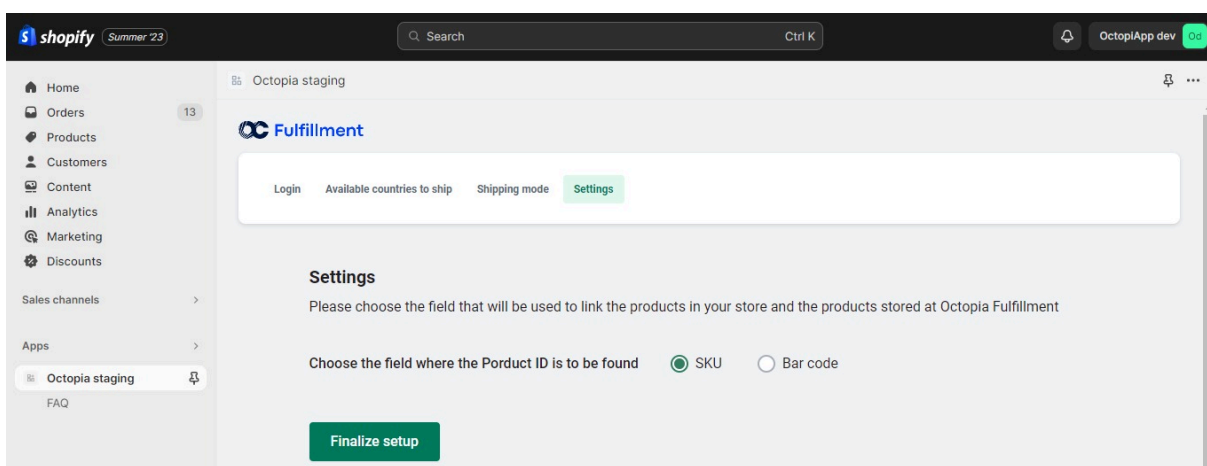
3. Stock Module

In this module, you can review the products from your store available for shipping through the Octopia service. For each product, the following information will be displayed:

- Product Image
- Product Name
- SKU (Product Reference Number)
- Committed Inventory (Refers to the number of units that are part of a placed order but aren't yet fulfilled.)
- Available Inventory (Refers to inventory that you can sell. Available inventory isn't committed to any orders or reserved for any draft orders.)
- Stock On Hand (Refers to the total number of units that you have at a location, "Committed inventory + Available inventory".)

At the top of this window, you will find (from left to right):

- The number of synchronized products
- The last synchronization date of product stock
- A button to synchronize product stock
- An option to search by product name
- An option to sort by name or total stock

The synchronization of the stock of the products is done automatically every 15 minutes, however it is possible to do it manually by clicking on the "Sync products" button.
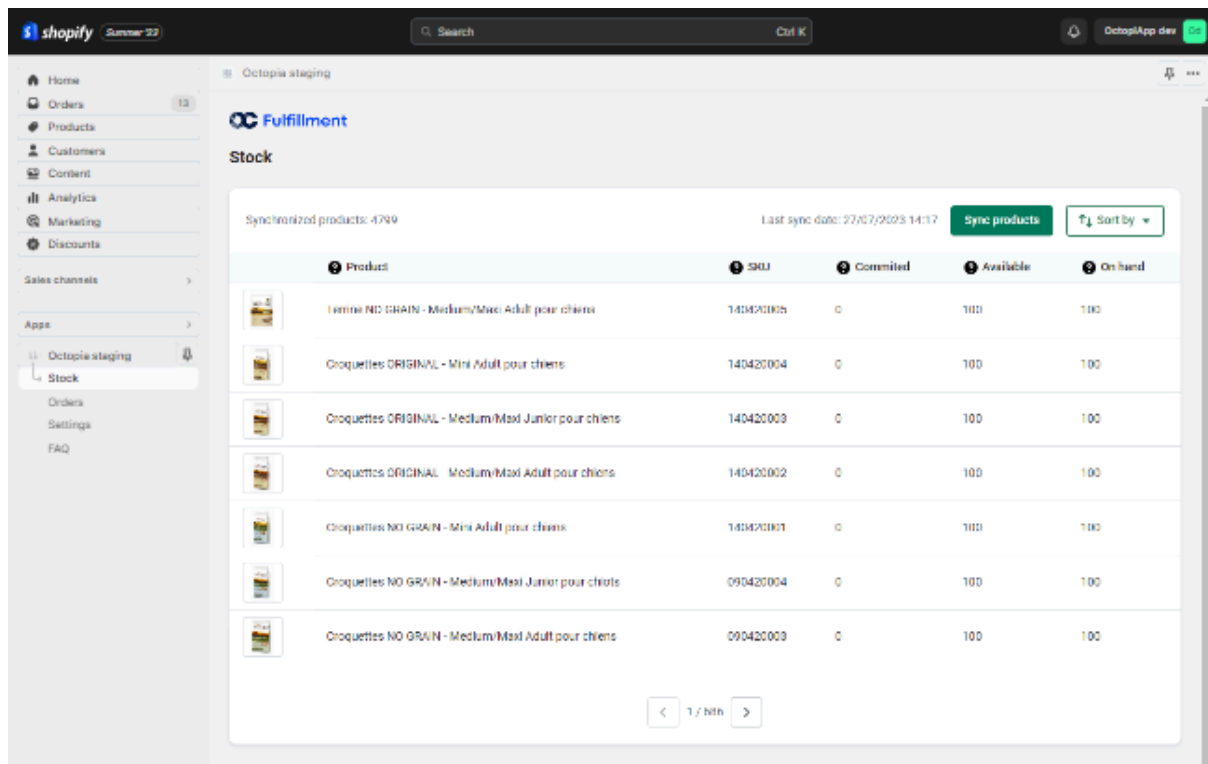
4. Orders Module

In the Orders module, you can review all the orders sent through our service. For each order, the following information will be provided:

- Order ID
- Date and Time of Order
- Customer Name
- Selected Shipping Method
- Total Order Price
- Payment Status
- Shipment Status
- Number of Items in the Order
- Shipping Country
- In more details, you will find:
    - Minimum and Maximum Shipping and Delivery Dates
    - Carrier Name
    - Tracking Code
- In the top right corner, you will find an option to organize orders in ascending or descending order, or search for orders by order number.
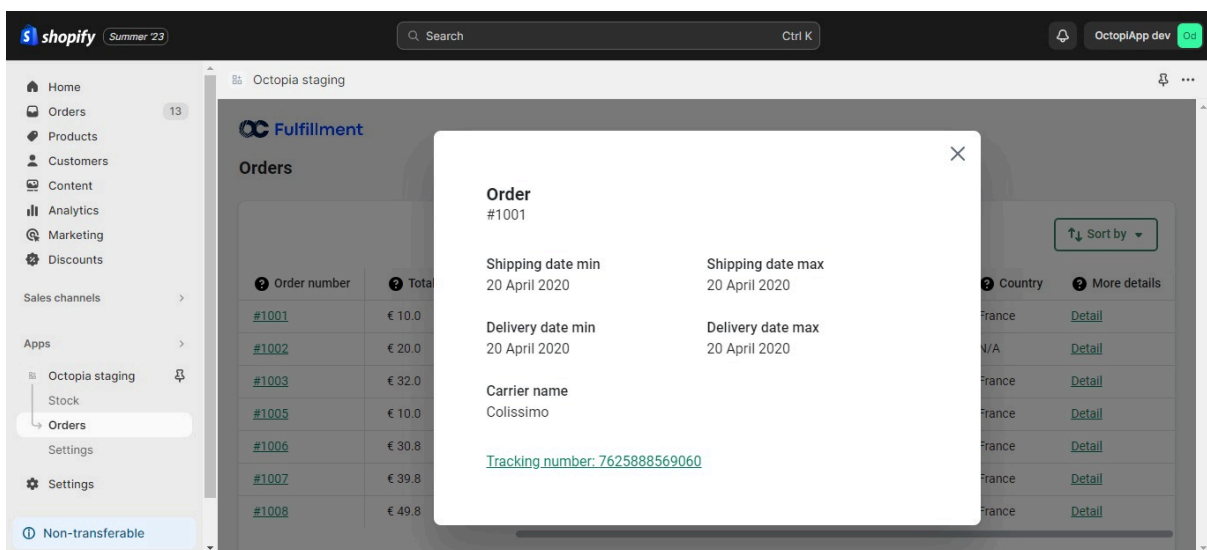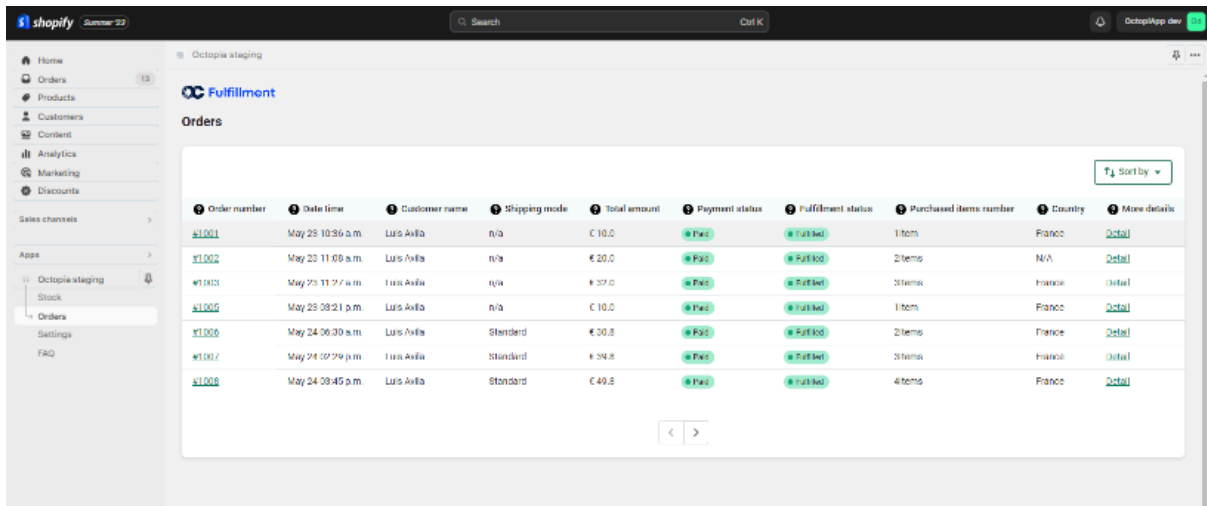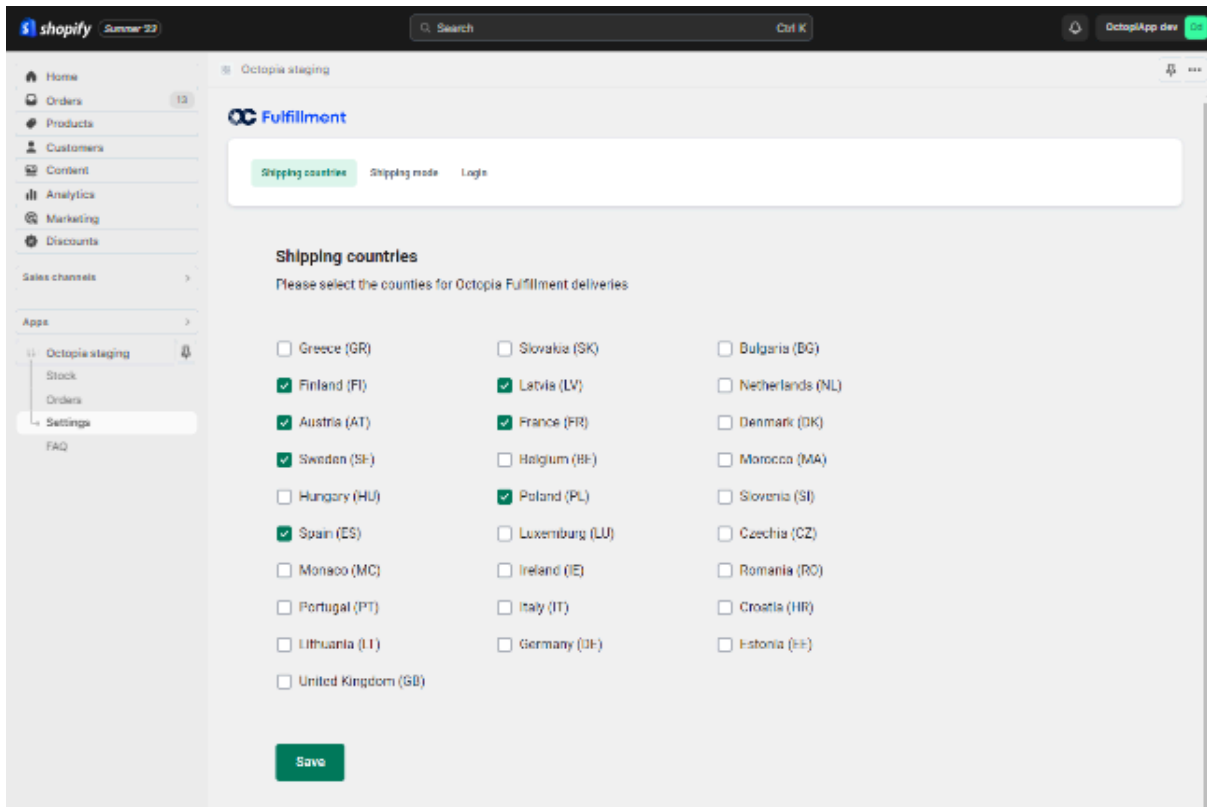
5. Settings

In the Settings module, you can modify the following elements:

Modifying Shipping Countries

1. Select the "Shipping Countries" option.
2. Make necessary changes to the list of countries enabled for shipping. You can select new countries or deselect existing ones.
3. Confirm your changes by clicking the "Save" button.

Modifying Shipping Methods

1. Select "Shipping Methods" option.
2. Make necessary adjustments to the previously assigned shipping methods. You can modify any shipping method or remove any that are no longer available.
3. Confirm your changes by clicking the "Save" button.
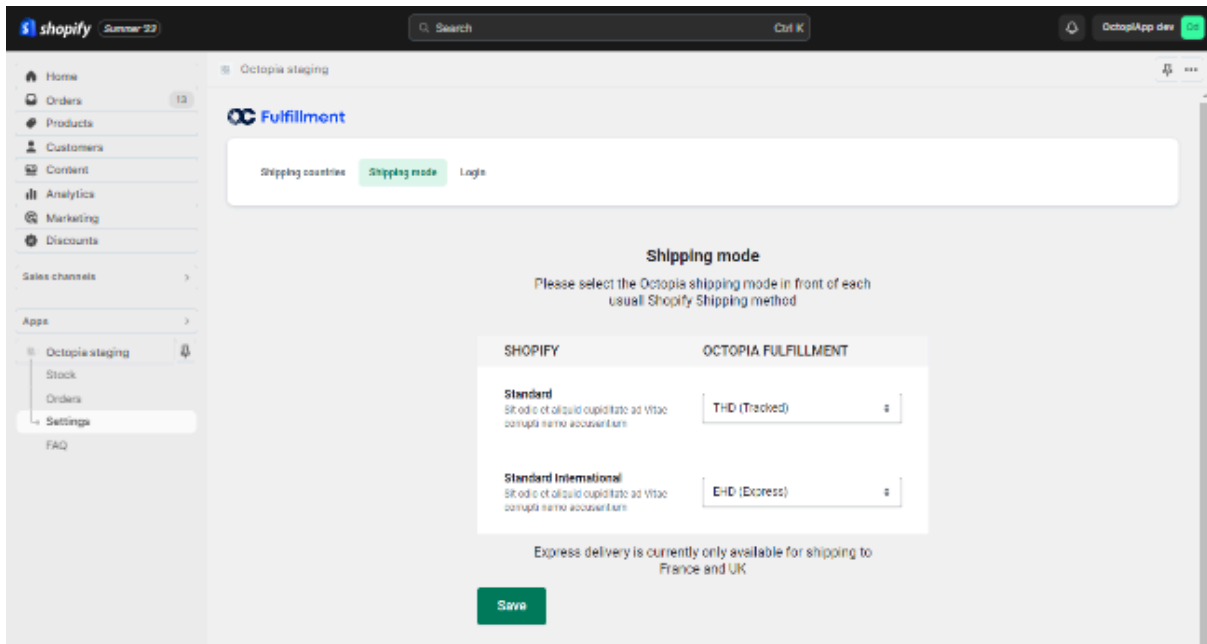
Access Management

1. Select "Login" option.
2. In this section, you can modify the following access data:
   a. ID Client
   b. Client Secret
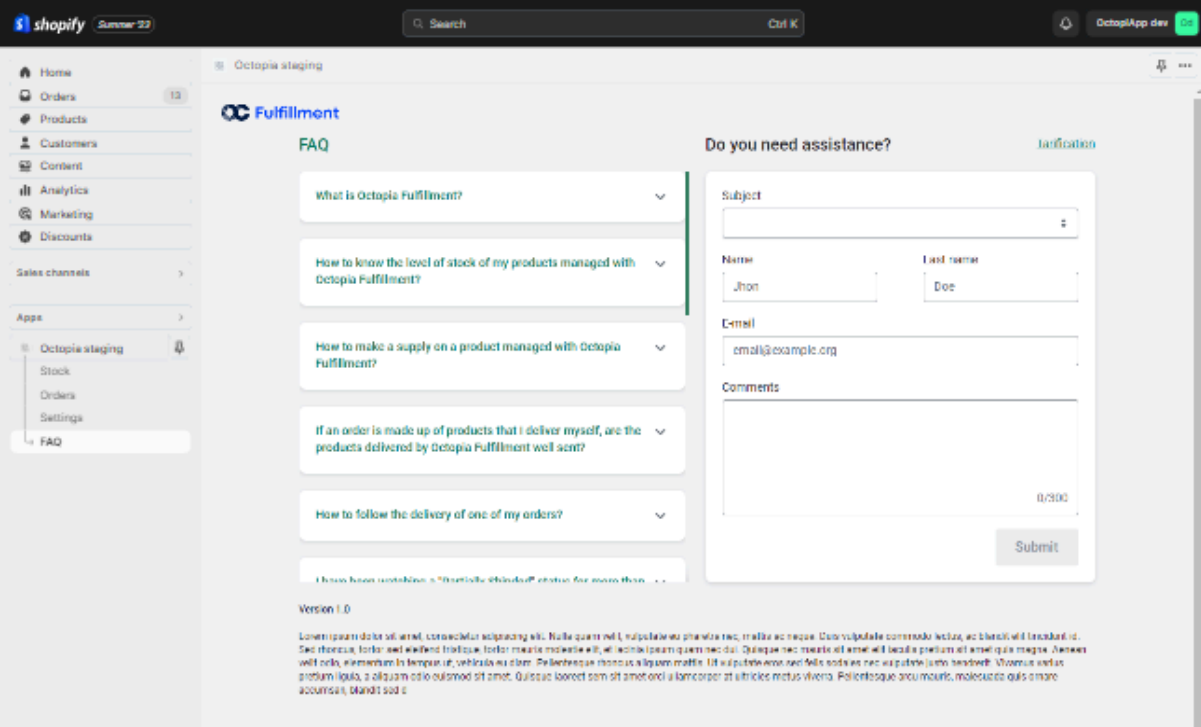3. Confirm your changes by clicking the "Save" button and confirm the validation message.

NOTE: Please be careful when modifying this data as it may affect the application's connection and disrupt your shipping flow.
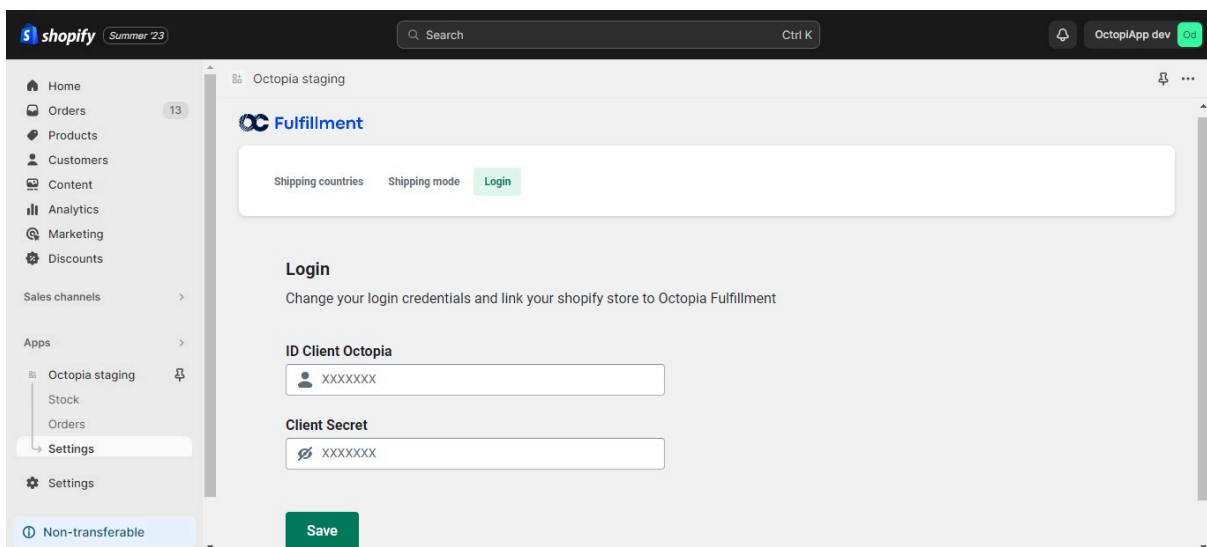
6. FAQ (Frequently Asked Questions)

In this section, you will find answers to common questions about the application. If you have additional inquiries or experience any issues with the application, please use the provided contact form to seek assistance from our technical support team.

Congratulations! You are now ready to use the Shopify Shipping Management Application effectively. If you have any questions or encounter any issues, consult this manual or contact our support team for further assistance.