



# WebShop

User Manual

The instructions in this manual are for informational purposes only and are subject to change. Protonic Software GmbH assumes no liability. The software described in this manual requires a license.

The individual functions are described using screenshots. Depending on your easyjob license, operating system or Office version, the functions and screenshots you have in your environment may differ from this manual or may only be available in later versions.

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# INTRODUCTION

Information about the structure and content of this document can be found here.



## Important notice

This manual will help you get started with the easyjob 6 rental software WebShop module.

The development of the easyjob rental software as well as the documentation has been done with great care. The individual program functions are constantly checked through our Quality Assurance Process. However, errors can still occur.

## Main Office

protonic software GmbH  
Frankfurter Landstr. 52  
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Germany

<http://www.protonic-software.com>

## Support

You can find more information about the support options on-line at <http://www.protonic-software.com/en/easyjob/corporate/support/>.

In addition, there is a support forum where you can exchange information with other users. The support forum can be found at <http://forum.protonic-software.com>

## Training

We offer customized training programs for the following extensive topics.

To learn more, please visit our website at

<http://www.protonic-software.com/en/service/training/> or contact our sales office at [sales@protonic-software.com](mailto:sales@protonic-software.com).

## About this manual

The individual functions are described using screenshots of easyjob license 6. Depending on your easyjob license, the forms you have in your environment may differ from the screenshots shown in the manual.

## How to use this manual

This document uses the following standards


### Functions that require a license

Individual program functions are made available in your easyjob environment based on your license. This may concern individual program functions or entire modules.

Functions that are only available in individual modules are marked with minimum-edition symbols **S**, **M**, **L** or **XL**. Some functions are limited in easyjob S. There is no indication of this. You can find the limitations in the version comparison matrix on our website.

Functions that are only available by subscription are marked with the symbol .

For example:

<b>L</b>	The function is only available in easyjob L and easyjob XL
<b>L</b> 	The function is only available in easyjob L and XL with a current subscription.

### easyjob-specific terms

In order to make a description better understood, in some cases easyjob-specific terms are **highlighted** with a color.

For example: with the **Project** and **Job** Groups, you also have the possibility to select a **Template**.


### Work steps, buttons, actions and menu paths


Individual work steps, actions, menu paths or clicks are separated from each other or initiated by the symbol "".

Buttons, menus, tabs, etc. used in context are **highlighted** in color.

Example 1: For this, check the field **Edit all items in the list**.

Example 2: easyjob Menu  **View**  **Monthly Overview**

Example 3:  **Help**

Example 4:  **Ok**

### Reference to other chapters

References to other chapters and sections are marked with a manual icon and displayed in color.

Example: See section  **Important information**.

### Important information

Important information is highlighted in orange and presented with a light bulb.











For example:



This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important. This information is important.

### Special keys

Special keys are represented with the following symbols:

	Windows key
	Tabulator key
	Arrow keys
	Return key
	Context Menu key
	Escape key
	Function key 1
	Control key. Keep the control key pressed down and press the A button.
	Alt key. Keep the Alt key pressed down and also press the H button
	Delete key

### Phrasing

In this manual and in the easyjob examples, terms such as employee, assistant, technician or carpenter are used both for men and for women.

### Screenshot explanations

The screenshots will be explained using numbers ① ② ③ and arrows → marked. Screenshot highlights will be marked with orange frames.

Number	Name	Invoice Date	Total	Total incl. Tax	Name1	Status	Paid	Terms of Payment	Open
13-0006	Big Show	27/04/2015	€36,000.00	€36,000.00	Big Events Inc.	Open	<input type="checkbox"/>	Big Project Payment Plan	€36,000.00
13-0008	Downtown Art Exhibition	27/04/2015	€16,650.00	€17,899.50		Open	<input type="checkbox"/>	Big Project Payment Plan	€17,899.50
12-0007	Big Opening Shopping Mall 1b	14/04/2016	€7,150.00	€7,865.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€7,865.00
12-0004	Big Opening Shopping Mall 2	14/04/2016	€7,150.00	€7,865.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€7,865.00
12-0006	Big Opening Shopping Mall 1a	14/04/2016	€7,150.00	€7,865.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€7,865.00
12-0008	Big Opening Shopping Mall 1c	14/04/2016	€6,300.00	€7,049.00		Open	<input type="checkbox"/>	Remit within 30 days	€7,049.00
12-0001	Repair	29/03/2016	€1,160.10	€1,170.21		Open	<input type="checkbox"/>	Pre-paid by credit card	€1,170.21
02-0001	Sample Project	26/11/2012	€492.00	€492.00	Max Sample Customer	Exported	<input type="checkbox"/>	Remit within 30 days	€492.00
10-0001		21/04/2015	€1.00	€1.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€1.00
13-0009		27/04/2015	€0.00	€0.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€0.00
13-0007	CATS Revue	27/04/2015	€0.00	€0.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€0.00
13-0005	Big Show	27/04/2015	€0.00	€0.00		Open	<input type="checkbox"/>	Big Project Payment Plan	€0.00
<b>Totals</b>		Quantity	17	Total	€82,053.10	Total incl. Tax			€86,199.71

### Additional documentation

In order to make it easier to become acquainted with and consult the easyjob documentation, we have divided it into multiple sections.

You can find an overview of all documentation on the following website.

<http://www.protonic-software.com/en/service/downloads/>



# **INSTALLATION AND CONFIGURATION**

This chapter provides an introduction to installation and configuration of the easyjob Web Shop Plugins.

## **Introduction**

The Webshop-Plugin connects your WordPress-WooCommerce-Plugin with easyjob. In order to integrate this feature, you will need to have in-depth knowledge of WordPress or hire a marketing professional who is experienced with this product.

Our Product Support team will gladly assist you with any issues or concerns regarding the interface between easyjob and the WooCommerce-Plugin.

Please note that we are not affiliated with Wordpress and can only address concerns related to easyjob.

You will need to contact a WordPress professional directly for any questions related to the installation, design, functionality or customization of Wordpress products.

## **Concept**

In order to provide you with as much flexibility as possible, we have developed the easyjob WebShop Plugin with the Wordpress-WooCommerce-Plugin on widely available technology. In this way, web developers are provided with extensive options for customizing the WebShop to suite individual needs.

Unlike the easyjob WebApp, the WebShop does not require any live access to your system.

The Plugin synchronizes your items from the easyjob database with your shop database. Synchronization can take place manually or automated at certain intervals.

The customer places the desired items in the cart. After sending the cart, the order is sent via an e-mail with a file attachment to a company e-mail account. The order file is opened with easyjob and is used to create a project.

## WebApp vs. WebShop

	WebApp	WebShop
<b>Access</b>	Real-time access to the easyjob database	Decoupled from the easyjob live database
<b>Technical requirements</b>	External access to the easyjob server	Web server with Wordpress and WooCommerce Plugin
<b>Entry hurdles for the end customer</b>	Medium, as the processes are handled in easyjob projects	Low, as items can be easily placed a cart
<b>Placing the goods in the cart and order</b>	Yes	Yes
<b>Availability check</b>	Yes	No
<b>Access to existing Projects</b>	Yes	No
<b>Extensive authorization structure</b>	Yes	No

## Technical requirements

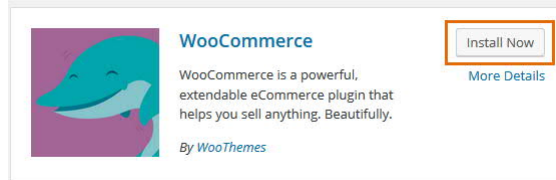
Some requirements are necessary for the first-time use of the easyjob WebShop Plugin:

- easyjob Installation (at least version 6.3.2.43)
- easyjob WebShop license
- Wordpress website with WooCommerce
- Installation of the easyjob WebShop Plugin in WooCommerce
- Configuration of the WebShop Plugin in easyjob
- Editing of easyjob Master Data

## Installation of WooCommerce

Follow these steps to install and configure the WooCommerce Plugin:

1. WooCommerce must be installed in WordPress.
2. Dashboard ↩️ • Plugins ↩️ • Add New ↩️ • Search for **WooCommerce** and click Install Now



3. After installation is successful, click **Activate Plugin**
4. The WooCommerce configuration screen will appear
5. Select **Let's Go** ↩️ • **Continue**  
Set your country, currency and units and select **Continue**
6. Select your tax rate and continue

### Basic Tax Setup

Will you be charging sales tax?  Yes, I will be charging sales tax

How will you enter product prices?  
 I will enter prices inclusive of tax  
 I will enter prices exclusive of tax

Import Tax Rates?  Yes, please import some starter tax rates

Country	State	Rate (%)	Name	Tax Shipping
DE	*	19.0000	Mwst.	✓

7. Important: Select **I will enter prices exclusive of tax**
8. Select **Continue**
9. Select **Cash on Delivery** and then select **Continue**
10. ↩️ • **Return to the WordPress Dashboard**
11. Load the easyjob WebShop Plugin via the url <http://www.protonic-software.com/de/service/community> on protonic software website

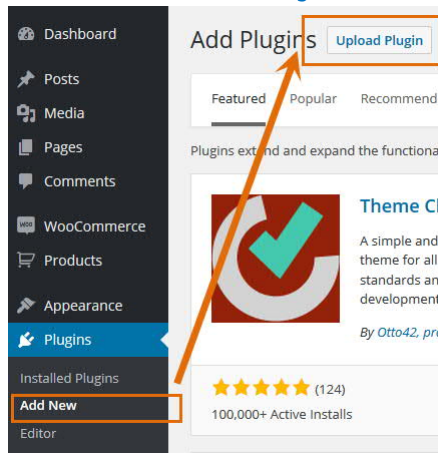
**easyjob 6 Webshop WordPress Plugin Download**

Das Webshop-Plugin verbindet Ihr WordPress-WooCommerce-Plugin mit easyjob. Das Paket wird zum Einspielen auf Ihrer Internetseite benötigt. Innerhalb von easyjob ist die Funktionalität bereits enthalten.

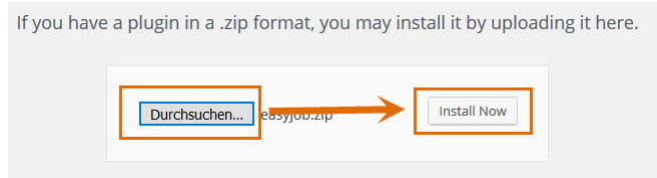
- [WordPress Plugin Version 1.0 herunterladen](#)

Weitere Informationen finden sie im easyjob WebShop Handbuch im Downloadbereich.

12. **Admin Dashboard** ↩️ • **Plugins** ↩️ • **Add New** ↩️ • **Upload Plugin**



13. Select here the loaded zip file and start the installation with [Install Now](#)



14. ↩️ • Activate Plugin



## Configuring the easyjob WebShop Plugin

The easyjob WebShop Plugin configuration can be accessed via [Dashboard](#) ↩️ • [WooCommerce](#)  
↩️ • [easyjob](#).

If you receive an error message regarding insufficient access rights, you must be granted the PHP user write access for the directory "`..\wp-content\plugins\easyjob\orders`".

## Configuration – WooCommerce

WooCommerce permits many customization options. The settings addressed below are those that are necessary for proper operation with easyjob.

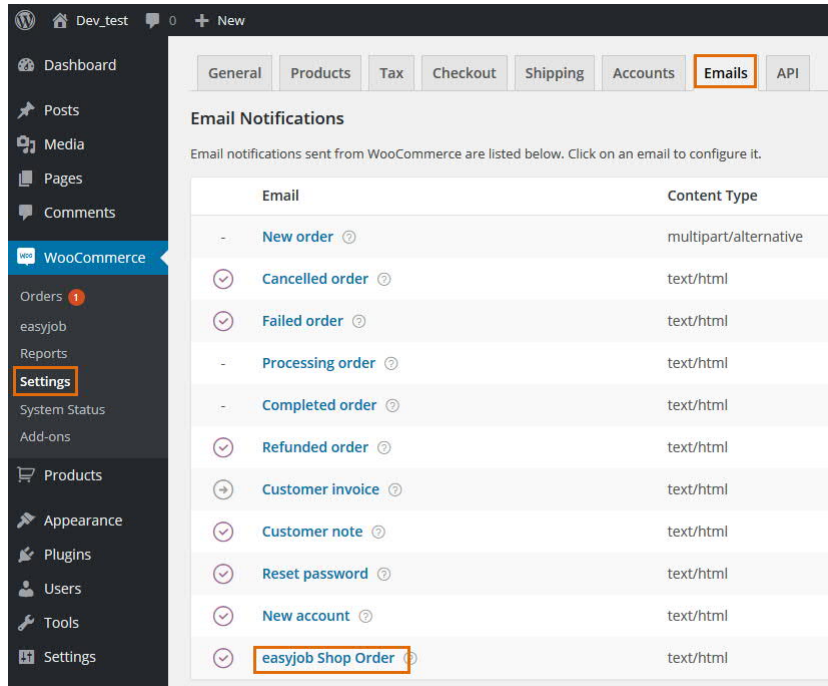
### E-Mail basic settings

To allow the shop to send a notification e-mail with the respective order, the email settings must be configured.

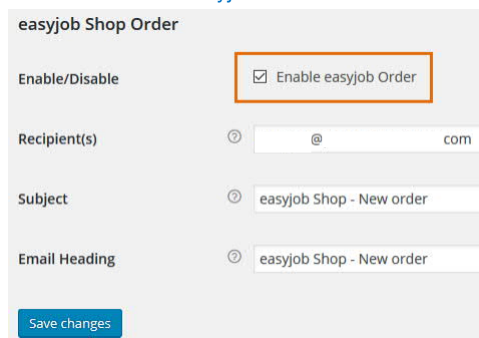
If you have problems with sending emails, we recommend the Postman SMTP Plugin (<https://wordpress.org/plugins/post-smtp/>) to test it.

Activating e-mail notification

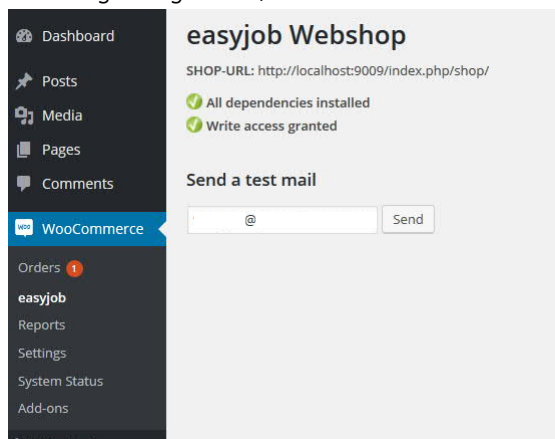
1. [Dashboard](#) → [WooCommerce](#) → [Settings](#) → [Emails](#) → [easyjob Shop Order](#)



2. Activate [Enable easyjob Order](#) and enter the e-mail recipient



3. Following configuration, send a test e-mail



If sending an Order does not function for some reason, you can try to send it again.

## Resending the Order

1. [↔ AdminDashboard](#) ↔ [↔ WooCommerce](#) ↔ [↔ Orders](#) ↔ [↔ Check all necessary Orders](#) ↔ in the [Bulk Actions](#) dropdown menu select [Resend easyjob Order](#) and confirm with [Apply](#).

## Additional basic settings

### Tax

The tax settings must be customized if the configuration was incorrect when installing the shop Plugin or if additional tax codes should be added.

The calculation of taxes can be completely deactivated. If it is enabled, you must select [I will enter prices exclusive of tax](#), to ensure that the prices are consistent with the prices from easyjob.

General Products **Tax** Checkout Shipping Accounts Emails API

**Tax Options** | Standard Rates | Reduced Rate Rates | Zero Rate Rates

**Tax Options**

Enable Taxes:  Enable taxes and tax calculations

Prices Entered With Tax:  Yes, I will enter prices inclusive of tax  
 No, I will enter prices exclusive of tax

Calculate Tax Based On:

Shipping Tax Class:

Under Standard Rates, the tax can be determined independently of the country or city.

"Standard" Tax Rates

Country Code	State Code	ZIP/Postcode	City	Rate %	Tax Name	Priority	Compound	Shipping
*	*	*	*	19	Mehrwertsteuer	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons: Insert row, Remove selected row(s), Import CSV, Export CSV

### Payment method

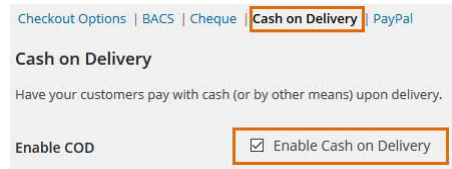
The payment methods must only be customized if the configuration was incorrect when installing the shop Plugin or if additional payment types should be added.

In a normal case, all payment types except for [Cash on Delivery](#) can be deactivated.

Gateway	Gateway ID	Enabled
Direct Bank Transfer	bacs	<input type="checkbox"/>
Cheque Payment	cheque	<input type="checkbox"/>
<b>Cash on Delivery</b>	cod	<input checked="" type="checkbox"/>
PayPal	paypal	<input type="checkbox"/>

## Customizing the payment type

1. WooCommerce ↔ Settings ↔ Checkout



Checkout Options | BACS | Cheque | **Cash on Delivery** | PayPal

**Cash on Delivery**

Have your customers pay with cash (or by other means) upon delivery.

Enable COD  Enable Cash on Delivery

## Configuration in easyjob

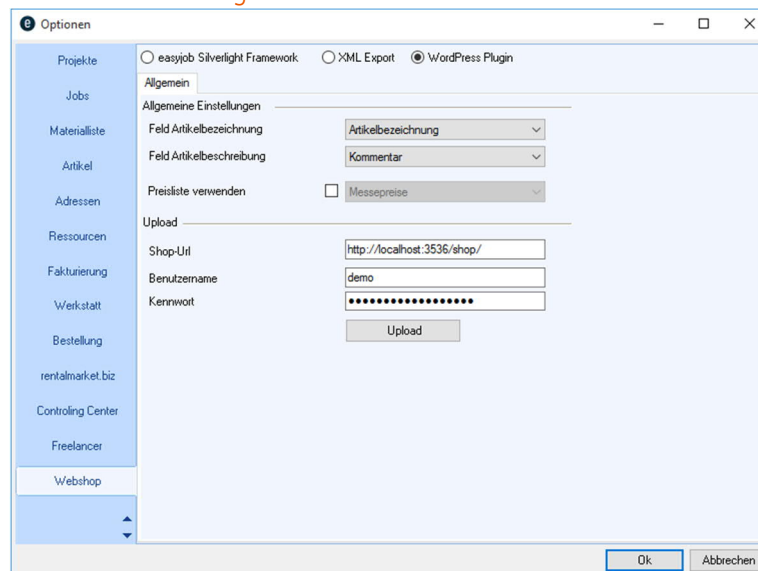
After successfully activating easyjob, the WebShop module will be available in easyjob.

Activating the easyjob WebShop Plugin:

1. ↔ Extras ↔ Options ↔ Functions ↔ Activate the WebShop Plugin

Configuration of the WebShop Plugin:

1. ↔ Extras ↔ Options ↔ WebShop ↔ Activate
2. Select WordPress Plugin



Optionen

easyjob Silverlight Framework  XML Export  WordPress Plugin

Algemein

Algemeine Einstellungen

Feld Artikelbezeichnung

Feld Artikelbeschreibung

Preisliste verwenden

Upload

Shop-Url

Benutzername

Kennwort

Upload

Ok Abbrechen

Configure the fields to be used for the Item Name and the Item Description. It is also possible to use your own price list for the Item Price List.

In the Upload Settings, select the URL of your WebShop as well as the Wordpress access data.

Select **Upload** to perform the first upload of the Item data.

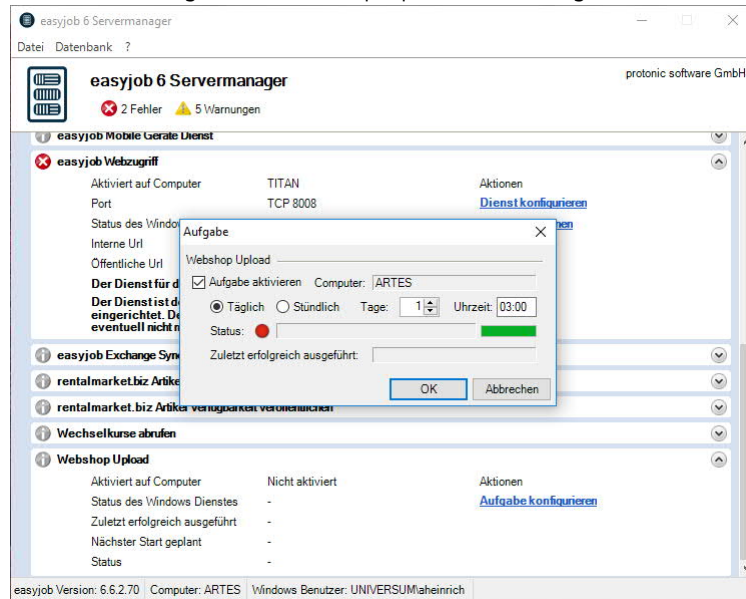
You can perform an Upload manually at any time as well as automatically via the Server Manager.



## WebShop - easyjob Master Data

### Setting up automatic synchronization

1. ↩• Servermanager ↩• WebShop Upload ↩• Configure Task



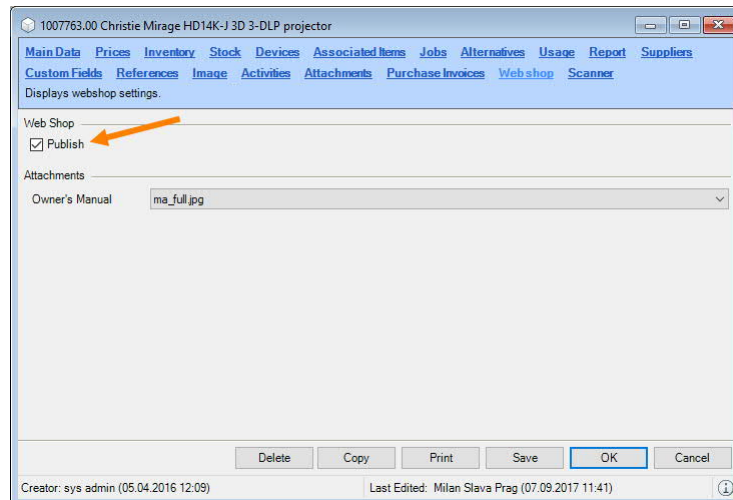
2. Select the desired interval. We recommend a daily synchronization overnight.

## easyjob Master Data

In the Item Master Data, you can decide which Items to publish in the WebShop.

Publishing Items in the WebShop:

1. ↩• Item Master Data ↩• Select Item ↩• WebShop tab
2. Activate **Publish**



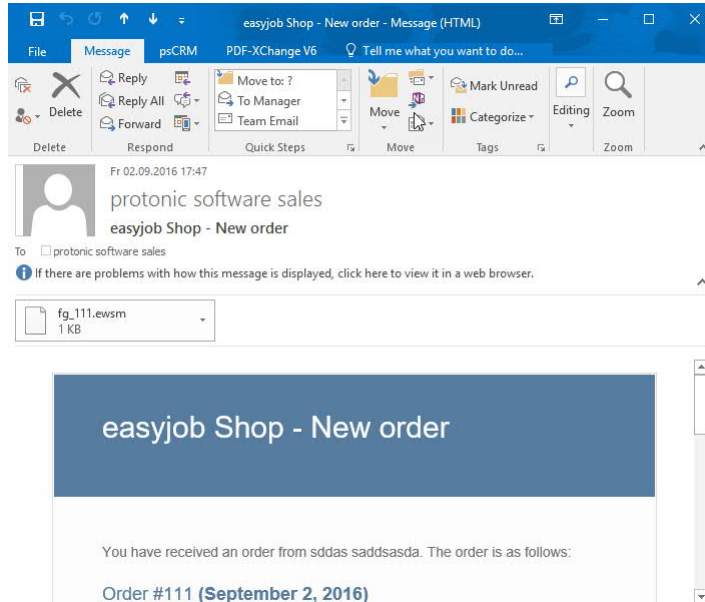
3. ↩• Save

## Importing an Order in easyjob

You receive an e-mail with an attachment for every WebShop Order.

Processing the WebShop Order

1. Export the e-mail attachment to a computer with the easyjob application installed.



2. Follow the wizard to create a finished product from the Order.

