



# **MyOwnDeliveries**

a Magento module

User manual

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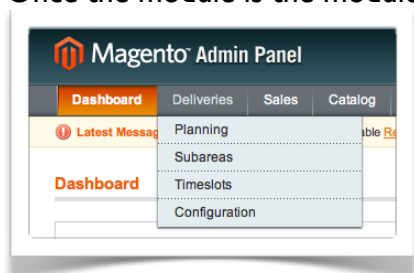
# Installation

## Module installation

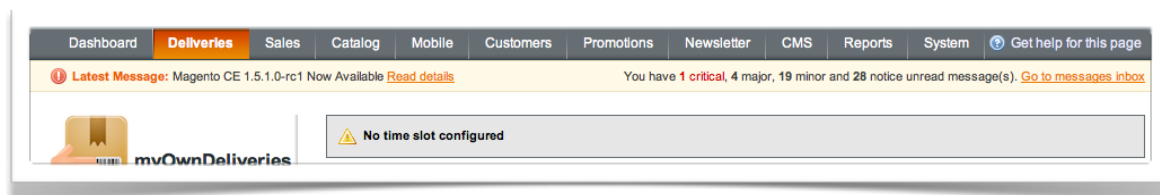
Launch extension installer by accessing Magento connect with the admin bar :  
System > Magento Connect > Magento connect manager

Upload or indicate the key of extension package and choose update or install then confirm installation.

Once the module is the module installed a new menu appears in the admin bar.



Messages warning you that the module is not configured. It's necessary to add at least one slot and subarea for the module to be functional.



# On the front office

## When ordering

### Displaying panel Reservation

The module allows customers to book a day and a delivery slot during the choice of carrier.

The reservation is performed after selection of the delivery address, in postage step.

The Reserve Board appears when selecting the carrier module, it disappears when selecting an other carrier.

The available slots are displayed in blue, the customer can only select an available time slot to validate the delivery. The availability of slot is calculated according to the sector associated with the delivery address of the customer. (See Limitation of reservations quota).

The screenshot shows the 'Checkout' page with a progress bar at the top indicating the current step is '3 Shipping Method'. Below this, the 'myOwnDeliverie' carrier is selected with a flat rate of €2.00. The 'Flat Rate' section shows 'Fixed €5.00' as an option. The '3b Delivery date' section displays a calendar for 'Suburbs (31400)' for 'week 17 on 2011'. The calendar shows slots for 25th, 26th, 27th, 28th, and 29th April, with time slots from 9:00am to 3:00pm. Slots for 25th, 26th, and 28th April are highlighted in blue, indicating they are available. A 'Continue' button is visible at the bottom right of the calendar section.

The slots are configured posted on a weekly schedule, the customer can change the week of delivery.

### Booking restrictions

The Reserve Board should mark the address selected by the customer.

If the postal code of the delivery address of the client is not on the delivery subareas declared, you can choose to not deliver the customer.

The screenshot shows the 'Checkout' page with the progress bar indicating the current step is '3 Shipping Method'. Below this, the 'myOwnDeliveries' carrier is selected. A red error message is displayed: 'We can't deliver you. Your postal code is outside our delivery subareas.' A 'Continue' button is visible at the bottom right of the error message section.

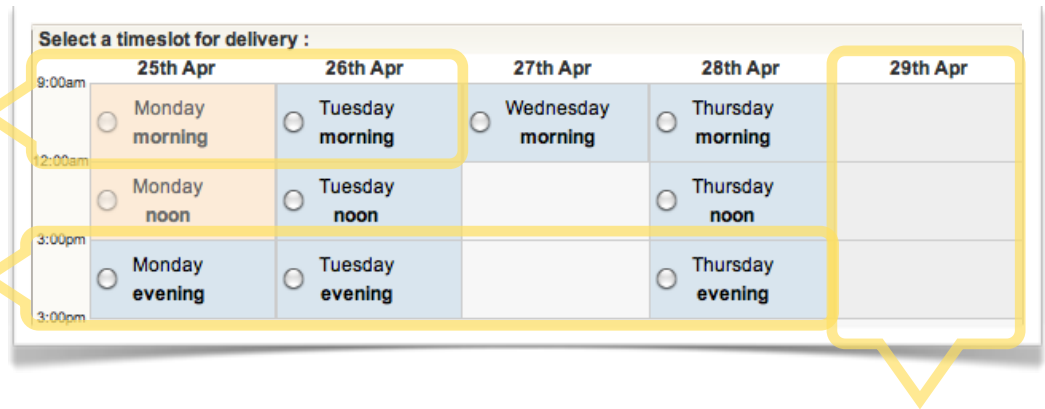
If the postal code of the delivery address of the client is on a delivery subarea deactivated, the customer cannot be delivered.



## Reservations calendar

The schedule takes into account the reservations already booked deliveries and follows the rules of the booking period.

Slots can be disabled on certain days of the week. In the example above the right slot from 8am to 12pm set off Saturday, Sunday and Monday.



The color of the timeslot depends on its ability to deliver which is calculated from the reservations already made and the customer's

You can set vacation periods and holidays for which no reservation is possible.

By default the reservation is automatically confirmed upon payment of the order but it can also be confirmed at a subsequent stage of the order.

# When subscribing

An option to manage the registration of customers:

- To view delivery options depending on the postcode of the address of the customer.
- To ban or not to validate the inclusion of the client whose address is not in a delivery area.

**Create an Account**

**Personal Information**

First Name \*  Last Name \*

Email Address \*

Sign Up for Newsletter

**Address Information**

Company  Telephone \*

Street Address \*

City \*  State/Province \*

Zip/Postal Code \*  Country \*

**Delivery notice**  
Please fill your postal code with format 99999  
*Registration is forbidden for customer out of delivery subareas.*

**Login Information**

Password \*  Confirm Password \*

The postal code is verified instantly when filled by the customer.

The information panel shows the delivery area of the postcode entered. The registration rules are displayed in italics. Registration for customers outside the areas of supply can be permitted, prohibited or subject to validation. The message displayed is customizable.

Example of entering a postcode which is inside an existing delivery subarea.

Example of entering a zip code delivery subarea of a non-existent or disabled.

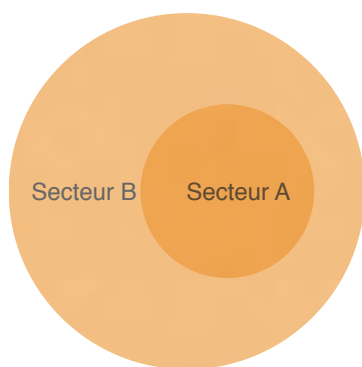
# Booking system

## Delivery sub areas

The delivery areas allow you to define your geographical areas of delivery from the postal code. For each sub area a quota can be set to optimize deliveries.

A client is assigned to a sub area based on its zip code of delivery address.

The customer can select a time slot if the postcode of the delivery address is included in an activated sub area.



For example you can set two subarea:

Subarea A for early delivery, including only the zip code of downtown.

Subarea B for longer deliveries, including postal codes in the city.

If we consider that a delivery subarea B takes two times longer than a delivery in subarea A, we can define a quota to 1 for a Sector A and to 2 sub area B.

## time slots occupation

The time slot occupancy is defined from its quotas and quotas from sub area of reservations made. For this, it's necessary to set the maximum quota of the time slots and the quota for each sub area. The quota of a sub area must be well below the maximum quota of a time slot.

A time slot is considered available when the total quota of subarea from deliveries already reserved is less than the maximum quota of the time slot (including quota of subarea from delivery of the customer doing the reservation).

You can consider the unit quota as you want: minutes, miles or other.

### Occupation example

Example : a quota set to 1 for the subarea A and set to 2 for the subarea B

Time slot	Tie slot quota	Sub area A reservations	Sub area B reservation	Sum of quotas	Occupation	Availability
Monday morning	10	2	0	2	10%	Several in sub area A or B
Monday midday	30					
Monday evening	20					
Tuesday morning	10					

#### Delivery notice

We can deliver you, your postal code is in our delivery subareas. (City center)  
Registration is forbidden for customer out of delivery subareas.

#### Delivery notice

We can't deliver you. Your postal code is outside our delivery subareas.  
Registration is forbidden for customer out of delivery subareas.

# Reservation windows

The booking window is all the weeks which a reservation is possible. Defined by:

- The day and start time of the booking period,
- The reservation shift that defines the number of weeks to wait to make a reservation
- The reservation period that defines the number of weeks during which it is possible to make a reservation

In all cases it is not possible to perform reservation the same day.

## Reservation windows samples

mon	tue	wed	thu	fri	sat	sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

In the example displayed, the reservation windows is defined by :

Reservation period : 7 days

Reservation start : The next week

week start : Monday 00H00

*The days available begins on Monday of the next week.*

mon	tue	wed	thu	fri	sat	sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

In the example displayed, the reservation windows is defined by :

Reservation period : 12 days

Reservation start : The same day

*The days available begins the current day for 12 days.*

mon	tue	wed	thu	fri	sat	sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

In the example displayed, the reservation windows is defined by :

Reservation period : 12 days

Reservation start : After some days :  
1 day

*The days available begins the next day for 12 days.*

## Reservation validation

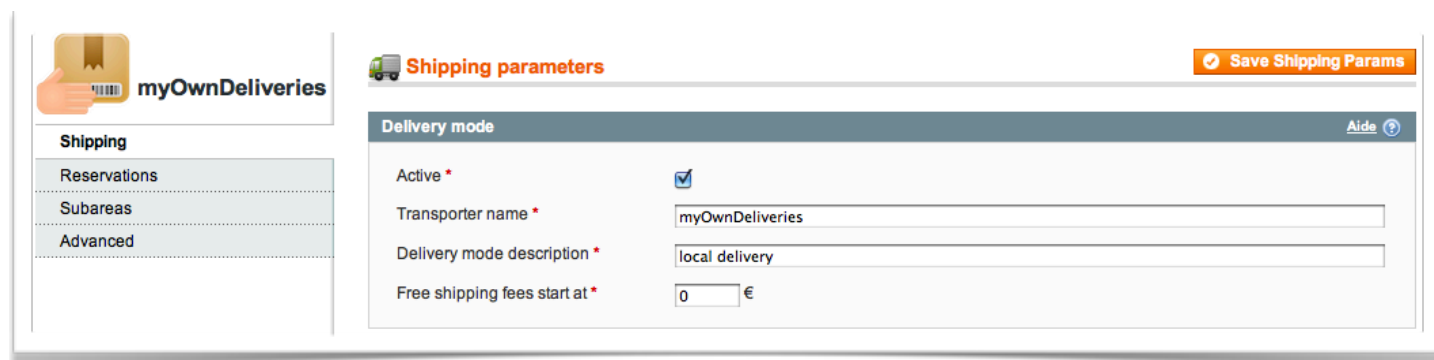
The reservation is attached to the user control if it exists. By default the booking is confirmed when the order goes to state awaiting payment. The calculation of the occupation of slot is made according to the validated orders.

It is possible to choose the order status to validate the reservation. Example: Payment accepted.



# Settings

## Carrier settings



The screenshot displays the 'myOwnDeliveries' carrier settings interface. On the left, a sidebar contains a navigation menu with 'Shipping' selected, along with 'Reservations', 'Subareas', and 'Advanced'. The main content area is titled 'Shipping parameters' and features a 'Save Shipping Params' button in the top right corner. Below the title, there is a 'Delivery mode' section with an 'Aide' link. The settings are as follows:

Delivery mode	
Active *	<input checked="" type="checkbox"/>
Transporter name *	<input type="text" value="myOwnDeliveries"/>
Delivery mode description *	<input type="text" value="local delivery"/>
Free shipping fees start at *	<input type="text" value="0"/> €

## Transporter settings

These options let you configure the module as a transporter you have to enable the module to make it visible by customers on carrier selection during shipping on checkout page.

You can personalize the name et description of the delivery method that are show to the customer during checkout.

You can also Indicate the amount from which deliveries would be offered to the customer, if set to 0 the delivery cost is calculated from delivery subarea cost. If set to 0 the discount is disabled.

# Reservation settings

## Time slots management

Delivery timeslots <span style="float: right;">+ Add a new Time Slot</span>												
ID	Name	Start time	End time	Quota	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Action
3	morning	10	9:00am	12:00am	✓	✓	✓	✓	✓	⊖	⊖	<a href="#">Edit</a>
1	noon	10	12:00am	3:00pm	✓	✓	⊖	✓	✓	⊖	⊖	<a href="#">Edit</a>
2	evening	10	3:00pm	7:00pm	✓	✓	⊖	✓	✓	⊖	⊖	<a href="#">Edit</a>

The panel show all the time slots configured, click on the «Actions» column to edit or delete a time slot. The time slot is a period during which a customer can be delivered. You can create as many time slots that you want but the end time or start time of a time slot cannot be included between the start time and the end time of another time slot.

## Time slot edition

**Edit delivery Time Slot 3**

[Back](#)
[Delete Time slot](#)
[Save Time slot](#)

---

**Time Slot details**

Name *	<input type="text" value="morning"/>
Start time *	<input type="text" value="09"/> : <input type="text" value="00"/> <input type="text" value="AM"/>
End time *	<input type="text" value="00"/> : <input type="text" value="00"/> <input type="text" value="PM"/>
Quota	<input type="text" value="10"/>
Monday	<input checked="" type="checkbox"/>
Tuesday	<input checked="" type="checkbox"/>
Wednesday	<input checked="" type="checkbox"/>
Thursday	<input checked="" type="checkbox"/>
Friday	<input checked="" type="checkbox"/>
Saturday	<input type="checkbox"/>
Sunday	<input type="checkbox"/>

To configure a time slot you must set :

- A name : cannot be empty and must be smaller than 10 chars. The name is show when a customer select a time slot.
- A start time and end time : A start time and a end time of the time slot cannot be included between the start time (excluded) and the end time (included) of another time slot.
- A quota which limits the number of deliveries : must be an integer of 4 digit max. Read the reservation system chapter for further quota explanation. Select unlimited if you don't want to use quota for this time slot.

- The days : Check the days for which time slot would be available in each week.

# Reservation window properties

**Reservation parameters** Save Reservation Params

**Reservation window properties** Aide ?

Reservation start

days

Reservation Period \*  days

**Holiday period** Aide ?

ID	Start date	End date	Action
1	Friday 22nd April 2011	Friday 22nd April 2011	<a href="#">Delete</a>
2	Friday 29th April 2011	Friday 29th April 2011	<a href="#">Delete</a>

Add new holiday

## Reservation start

This option allows you to choose when the reservation start.

- Select "the current day" so that reservation can be made the day of order; in which case you must specify whether the reservations can be made during the current slot, otherwise the reservations will only be possible on the next time slot.
- Select "After a few days" so that reservations can be made one or more days after the date of the order; in this case you need to specify the number of days in period (1 for next day, 2 for on-day etc. ...).
- Select "next week" so that reservations are only possible one week to the next (if the current week is started, the booking will only be possible from the beginning of the following week). In this case you can change the day and time of the start of the week.
- Select "After a few weeks" so that reservations can be made a week or more after the date of the order; in this case you must specify the number of weeks of delay.

## Reservation period

This option let you chose the reservation period in days. For instance if the reservation start is set to 1 day after and the reservation period is set to 2, the customer can select a delivery time slot during the two next days. If this parameter is set to 0, the reservations are available until the end of start day.

## Holiday period

Indicates holiday start and end by clicking on the input. The start and end date are included into the holidays. For a day only indicate the same start date and end date.

# Subarea settings

ID	Name	Quota	Enabled	Postcodes	Cost	Action
1	City center	1	✓	31000;	0 €	<a href="#">Edit</a>
2	Suburbs	5	✓	31100; 31300; 31400; 31500; 31700;	2 €	<a href="#">Edit</a>

## Subareas management

The subareas are geographical zones defined by a list of postcodes. The customer will be automatically linked to a subarea depending on his postal code. The quota of each subarea let you control the number of deliveries that you allow for each time slot.

## Subarea edition

**Edit delivery Subarea 2** [Back](#) [Delete Subarea](#) [Save Subarea](#)

**Subarea details**

Name \*

Quota \*

Enabled \*

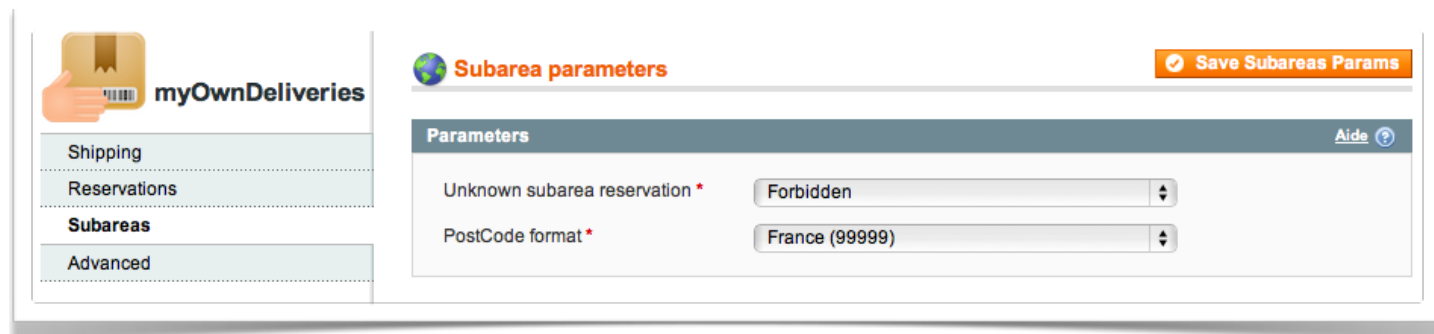
Postcodes \*

Cost  €

To configure a time slot you must set :

- A name : cannot be empty and must be smaller than 20 chars.
- A quota : must be an integer of 3 digit max. Read the chapter on reservation system for further quota explanation.
- Enabled : This checkbox let you enable or disable a subarea. Deliveries cannot be done on disabled subareas.
- The postcodes : you can fill multiples postcodes separated by a ';'. A postcode of the subarea cannot be included in the postcodes of another subarea. The postcode must have the format of the country selected in the subareas parameters.

## Subareas settings



The screenshot shows the 'Subareas parameters' configuration page in the myOwnDeliveries interface. On the left is a navigation menu with options: Shipping, Reservations, Subareas (selected), and Advanced. The main content area is titled 'Subarea parameters' and includes a 'Save Subareas Params' button. Below the title is a 'Parameters' section with two settings: 'Unknown subarea reservation' set to 'Forbidden' and 'PostCode format' set to 'France (99999)'. An 'Aide' link is visible in the top right of the parameters section.

### Unknown subarea reservation

Select the reservation capabilities for customers who are situated outside the configured subareas :You can forbidden deliveries for customer which postcode is not in subareas you configured.You can also choose to set automatic validation or not (depending on the status of order).


### Unknown subarea quota

If reservations are allowed for customers situated outside configured subareas select the quota that would be applied for time slot occupation calculation.


### Post code format

Select the post code format of your customers for validity check during the subscription.

# Advanced settings



myOwnDeliveries



Advanced parameters

[Save Advanced Params](#)

Shipping

Reservations

Subareas

**Advanced**

**Reservation Settings** Aide ?

Reservation status ▼ Canceled

Desactivate reservation Msg \*

**Control registration on post codes** Aide ?

Registration rules  Account allowed for customers inside unknown subareas

Registration page  Inform customers of my delivery capabilities

Forbidden registration Msg \*

Allowed registration Msg \*

Desactivate registration Msg \*

**Delivery messages** Aide ?

Allowed delivery Msg \*

On validation delivery Msg \*

Desactivated delivery Msg \*

Forbidden delivery Msg \*

## Reservation settings

This option let you chose on which step of the order the time slot is reserved. You should choose between "Awaiting cheque payment" or "Payment accepted" ("Awaiting cheque payment" works also for other payment modules). The status lower than the selected status invalidate the reservation and the upper status have no effect on the reservation.

## Registration settings

### Registration rules

This option configures the rules for registration if the postcode is not in a delivery area activated. If "Normal Registration" is selected, the customer's account can be created (but with the delivery carrier you selected would be refused if the postal code used for the delivery address is not available). If "inactive account" is selected the customer account is created, but the user can not log on (You can activate the account later). If "Account Deleted" is selected the customer account is deleted.

### Registration page

Check this option to display a block that indicate the availability of relevant delivery postal code filled in the form to create the customer. The note shows the delivery and registration messages below.

### Registration messages

These messages are displayed on the form creation account, if the delivery notice is displayed, and on the results page if the rule of the recording is not normal and the zip code is outside the box delivery.

## **Delivery messages**

These messages are displayed on the customer account creation form if the delivery notice is displayed, and in the carrier selection of an order if postal code of delivery address is not in a delivery zone.

# Administration

## Month deliveries view

This view allow you to easily see the deliveries per day for a month :

- A gauge representing the whole occupation of time slots as a percentage (the gauge is visible if there is no time slot with unlimited quota).
- The number of deliveries validated (and the number of none validated deliveries between brackets) .
- An exclamation icon appears on days that require your attention.

A calendar on the left side let you easily switch between month or select it.

You can view deliveries per week via the 'Action' column.

**myOwnDeliveries**

Month deliveries

Week deliveries

Day deliveries

Calendar

Switch month :

Prev Next

Select month :

April 2011

Show

**Deliveries for April 2011**

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Action
				1 0% 0 delivery	2 no time slot	3 no time slot	W13
4 0% 0 delivery	5 0% 0 delivery	6 0% 0 delivery	7 0% 0 delivery	8 0% 0 delivery	9 no time slot	10 no time slot	W14
11 0% 0 delivery	12 0% 0 delivery	13 0% 0 delivery	14 0% 0 delivery	15 0% 0 delivery	16 no time slot	17 no time slot	W15
18 0% 0 delivery (1)	19 0% 0 delivery	20 0% 0 delivery	21 0% 0 delivery	22 0% 0 delivery	23 no time slot	24 no time slot	W16
25 66% 4 deliveries	26 3% 1 delivery	27 0% 0 delivery	28 0% 0 delivery	29 holiday	30 holiday		W17

Each day show a color :

- Light yellow for day without time slot
- Yellow for a day with time slots
- Blue for the current day
- Light blue for days available for a reservation by a customer
- Grey for holidays

## Week deliveries view

This view allow you to easily see the deliveries for each time slot on a week :

- A gauge representing the occupation of the time slot as a percentage (the gauge is visible if the time slot have not an unlimited quota).
- The number of deliveries validated (and the number of none validated deliveries between brackets) .

An exclamation icon appears on days that require your attention.

A click on a time slot show the deliveries details for the day but for the selected time slot only, to show the deliveries details of the whole day click on the day date at the end of the column.



A calendar on the left side let you easily switch between weeks or select a week.

The screenshot displays the myOwnDeliveries interface. On the left, there is a sidebar with navigation options: 'Month deliveries', 'Week deliveries', and 'Day deliveries'. Below these is a 'Calendar' section with 'Switch week:' and 'Prev'/'Next' buttons, and a 'Select week:' dropdown set to 'W17 2011' with a 'Show' button. The main area is titled 'Deliveries for the week 17 on year 2011' and shows a grid of delivery slots for the week of 25th Apr to 1st May. The grid is organized by time slots (9:00am, 12:00am, 12:00pm, 3:00pm, 3:00pm, 7:00pm) and days. Each slot shows a gauge for delivery percentage and the number of validated deliveries. For example, Monday morning has an 80% gauge and 2 deliveries. Tuesday morning has a 0% gauge and 0 deliveries. Thursday morning has a 50% gauge and 2 deliveries. The 29th and 30th of April are marked as holidays. At the bottom, there are date links for 25/04/11, 26/04/11, 27/04/11, and 28/04/11, with a note that 1 delivery on 26/04/11 needs to be replanned.

Hours	25th Apr	26th Apr	27th Apr	28th Apr	29th Apr	30th Apr	1st May
9:00am	Monday morning 80% 2 deliveries	Tuesday morning 0%	Wednesday morning 0%	Thursday morning 50% 2 deliveries (2)	holiday	holiday	
12:00am	Monday noon 80% 2 deliveries	Tuesday noon 0%		Thursday noon 0%			
3:00pm	Monday evening 20% 2 deliveries	Tuesday evening 0%		Thursday evening 0%			
7:00pm							

## Day deliveries view

This view allow you to easily see the deliveries of a day ordered by time slot and by subarea :

- A gauge representing the occupation of the time slot as a percentage and the number of validated deliveries.
- The list of deliveries by subareas, with the color of order status (grey if the delivery is not validated).

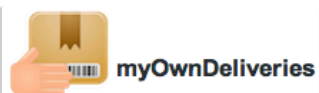
## Delivery details

Each delivery is displayed in details :

- The customer : His name that links to the customer record, his delivery address with a shortcut to Google Maps
- Summary of the order (number of products and total weight), the order number is linked to the order details. The current order status is also displayed.
- Delivery number that is linked to the delivery slip in PDF, and the status of the delivery.

A calendar on the left side let you easily switch between days or select a day.

A filter in the left side let you choose to show only the deliveries for a time slot or for a subarea or with a specific order status.



Month deliveries

Week deliveries

Day deliveries

## Calendar

Switch day :

Prev

Next

Select day :

2011-04-28

Show

## Filter

Order status :

All

Delivery subarea :

All

Time slot :

All

Apply filter

## Delivery for Thursday 28th April 2011

 morning (from 9:00am to 12:00am) 2 deliveries validated **50%**

## Suburbs

<input type="radio"/>	<b>Morgan JONES</b> 340 W 49th St 31400 New York	<b>Order N°100000010</b> (qty 1, 4.0Kg) Pending	Validated
<input type="radio"/>	<b>Caleb MOORE</b> 336 E 87th St 31500 New York	<b>Order N°100000013</b> (qty 1, 4.0Kg) Pending	Validation pending

## City center

<input type="radio"/>	<b>Hannah JOHNSON</b> 121 E 10th St 31000 New York	<b>Order N°100000011</b> (qty 1, 4.0Kg) Pending	Validated
<input type="radio"/>	<b>Elizabeth BROWN</b> 867 Madison Ave 31000 New York	<b>Order N°100000012</b> (qty 1, 4.0Kg) Pending	Validation pending

 noon (from 12:00am to 3:00pm) 1 delivery validated **40%**

## Suburbs

<input type="radio"/>	<b>patrice FAURE</b> 102 rue alfred dumeril 31400 Toulouse	<b>Order N°100000005</b> (qty 1, 4.0Kg) Pending	Validated
-----------------------	---	--	-----------

 evening (from 3:00pm to 7:00pm) 0 delivery validated **0%**

No delivery

## Unexisting or disabled time slots

## City center

<input type="radio"/>	<b>patrice FAURE</b> 102 rue alfred dumeril 31000 Toulouse	<b>Order N°100000004</b> (qty 1, 4.0Kg) Pending	Validated
-----------------------	---	--	-----------

## Edit selected delivery

Reschedule delivery day :

2011-04-28

Select Time Slot

Force validation status :

Validated

Apply

A panel at the end of the page let you reschedule or force the validation of a selected delivery.

## Delivery edit

To reschedule a delivery select it and select the new day then click on the «reschedule» button. The page is refreshed and shows the list of time slots (with time slots details and it occupation summary) you can reschedule the delivery to.

**Rescheduling delivery**

City center		
<b>Hannah JOHNSON</b> 121 E 10th St 31000 New York	<b>Order N°100000011</b> (qty 1, 4.0Kg) Pending	Validated

**From time slot :** morning (from 9:00am to 12:00am), the Thursday 28th April 2011

**To time slot :**

- morning (2 deliveries (2), 50%, from 9:00am to 12:00am) Thursday 28th April 2011
- noon (1 delivery, 40%, from 12:00am to 3:00pm)
- evening (0 delivery, 0%, from 3:00pm to 7:00pm)

## Deliveries of modified time slots

When editing time slots (by deleting them or disabling some days) you should not be able to find these deliveries which was affected to them. If it's the case you can find these deliveries with this panel.

**Unexisting or disabled time slots**

City center		
<b>patrice FAURE</b> 102 rue alfred dumeril 31000 Toulouse	<b>Order N°100000004</b> (qty 1, 4.0Kg) Pending	Validated

## **Credits**

MyOwnDelivery module for Magento is developed by



Study, development and operation of web site

## **Contacts**

[support@labulle.net](mailto:support@labulle.net)  
<http://myowndeliveries.labulle.net>