



Hermes Shipping for Magento® 2

The module *Hermes Shipping* for Magento® 2 enables merchants with a Hermes Shipping account to create shipments and retrieve shipping labels.

It also allows creating pickup orders to have several packages picked up by Hermes at a certain time.

End user documentation

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1 Requirements

The following requirements must be met for a smooth operation of the module.

1.1 Magento® 2

The following Magento® 2 versions are supported:

- Community Edition 2.2.0 or higher

1.2 PHP

These PHP versions are supported:

- PHP 7.0.2 | 7.0.4 | ~7.0.6 | ~7.1.0

Further information can also be found in these files inside the module package / repository:

- README.md
- composer.json

If in doubt: the version information in the file *composer.json* supersedes any other information.

2 Hints for using the module

2.1 HSI

The module communicates with the Hermes Shipping Interface (HSI). To use this, you need credentials which will be provided by Hermes. You can contact shipping-solutions@hermesworld.com

2.2 Customer notification and GDPR

When using the *Customer Alert Service*, the email addresses of your shop customers are transmitted to Hermes.

If you want to use this service, you need the approval from your customers, according to the GDPR (General Data Protection Regulation in the EU).

We recommend making an entry in the Magento® 2 Terms and Conditions for this (configuration at *Stores* → *Terms and Conditions*).

3 Installation and configuration

3.1 Installation

Install the module according to the instructions from the file *README.md* in the module package. It is very important to follow all steps exactly. Do not skip any steps.

Any database changes during installation are also shown in the file *README.md*.

The file *README.md* is included in the package, see chapter [Requirements](#).

3.2 Module configuration

There are three configuration sections which are relevant for creating shipments:

```
Stores → Configuration → General → General → Store-Information
Stores → Configuration → Sales → Shipping Settings → Origin
Stores → Configuration → Sales → Shipping Methods → Hermes
```

Make sure that the following required fields in the sections Store Information and Origin are filled in completely:

- Store Information
 - Store Name
 - Store Contact Telephone
- Origin
 - Country
 - Region / State
 - ZIP / Postal Code
 - City
 - Street Address

3.2.1 General Settings

In the Magento® 2 admin panel, go to section

```
Stores → Configuration → Sales → Shipping Methods → Hermes
```

In this section you can make the following settings:

- *Enabled*: Choose if the module should be enabled.
- *Sandbox Mode*: Select *Yes* to test the integration without creating real shipments. Make sure you have entered the correct credentials and click *Save*. Then click *Connect to HSI in sandbox / production mode*
- *Enable Logging*: Webservice messages will be logged to the Magento® 2 log files in `var/log`. No separate log file will be created for Hermes.
- *Username*: Enter the username for the Hermes Shipping Interface (HSI). Check if sandbox or production mode (live) is enabled.
- *Password*: Enter the password for the Hermes Shipping Interface (HSI).

- *Shipping methods for Hermes*: Select which shipping methods should be processed via Hermes.
- *Default Package Size*: Set which package size should be used by default.
- *Cash on delivery payment methods for Hermes*: Select the payment methods that are used for Cash on Delivery in your shop. When these payment methods are used, a Cash on Delivery label will be created. The bank account for the money transfer is not configured in Magento® 2.

Other input fields not described here are not relevant.

Login for sandbox / production mode

You need the correct login data (credentials) for sandbox and production mode. These are supplied by Hermes. See also the [Hints for using the module](#).

3.2.2 Available shipping services

Select which services should be usable.

- *Next day*: Select if shipments on the next day should be available.
- *Stated day*: Select if shipments on a specified day should be available.
- *Stated time*: Select if shipments at a specified time should be available.
- *Parcel Shop Delivery*: Select if shipments to parcel shops should be possible. If this is enabled, the *Parcel Shop Finder* can be used in the checkout.
- *Bulk goods*: Select if bulky goods should be available.

About the services *Household Signature* and *Identification Required* please read the section [Product-dependent services](#).

Additional cost

Note that Hermes might charge fees for additional services. If in doubt, contact the Hermes Customer Service, see the [Hints for using the module](#).

3.2.3 Automatic Shipment Creation

This section configures if shipments and labels should be created automatically.

You can also configure which order status an order must have to be processed automatically. You can use this to exclude specific orders from being processed automatically.

Note

Automated shipment creation requires working Magento® 2 Cron Jobs.

3.3 Product-dependent services

Some services depend on the products in the shopping cart.

This affects:

- Household Signature Delivery Only
- Identification Required

Some articles may not be sold to minors, or the shipment may only be handed over against a signature.

The Hermes module creates corresponding *Product attributes* in Magento® 2. These are assigned to the attribute set *Default* and can be used in any product.

Via these attributes, you can control if purchasing a certain product requires an Identification (e.g. passport number), or if a signature is required at delivery.

3.3.1 Enable or disable service attributes

The attributes can be enabled or disabled individually at each product. To edit many products at once via mass-action, do the following:

- Select the desired products in the catalog (click checkboxes).
- In the dropdown menu, click *Update attributes*.
- Enable the checkbox *Edit* at the respective Hermes attributes.
- In the dropdown menu of the respective attribute, select *Yes* or *No*.
- Click *Save*.
- Flush the Magento® cache.

Note

For each product, only **one** of the service attributes can be enabled, **not both at the same time**.

Services cannot be combined arbitrarily.

3.3.2 Usage

Enable the service attributes according to your requirements / products, see [Enable or disable service attributes](#).

If a customer puts a product into the cart for which *Identification Required* is enabled, a valid ID number needs to be entered during checkout before completing the purchase.

For products with *Household Signature Delivery Only* the customer will not see a note in the checkout. However, during delivery the signature needs to be provided.

4 Workflow and features

4.1 Creating an order

The following section describes how the Hermes extension integrates itself into the order process.

4.1.1 Checkout

In the [Module configuration](#) the shipping methods have been selected for which Hermes shipments and labels should be created.

If the customer now selects one of those shipping methods in the checkout, the shipment can later be processed by Hermes.

In the checkout step *Payment information* the Cash On Delivery payment methods will be disabled if Cash On Delivery is not available for the selected delivery address (see [General settings](#), section *Cash On Delivery payment methods for Hermes*).

4.1.2 Admin Order

When creating orders via the Magento® admin panel, the available services may be limited. Only those services shown in the popup can be booked (see workflow section [National shipments](#)).

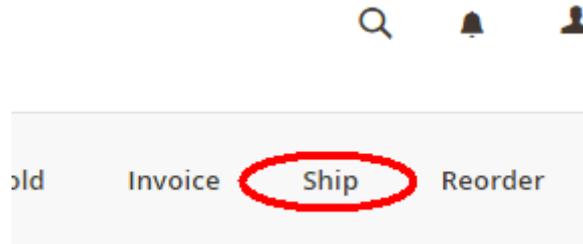
4.2 Creating a shipment

The following section explains how to create a shipment for an order and how to retrieve the shipping label.

4.2.1 National shipments

In the admin panel, select an order with a shipping method linked to Hermes (see [Module configuration](#), section *Shipping Methods for Hermes*).

Then click the button Ship on the top of the page.



You will get to the page *New shipment for order*.

Activate the checkbox *Create shipping label* and click the button *Submit Shipment...*

Shipment Options

- Create Shipping Label
- Append Comments
- Email Copy of Shipment

Submit Shipment...

Now a popup window for selecting the shipping items in the package will be opened.

Click the button *Add products*, select all products, and confirm by clicking *Add selected product(s) to package*.

The package dimensions are optional. Make sure the weight and package type are correct.

The button *OK* in the popup window is now enabled. When clicking it, the shipment will be transmitted to Hermes and (if the transmission was successful) a shipping label will be retrieved.

If there was an error, the message will be displayed at the top of the popup. You might have to scroll up inside the popup to see the error message.

The incorrect data can now be corrected, see also [Troubleshooting](#).

4.2.2 International shipments

Shipments are possible within the EU.

The process is the same as described in section [National shipments](#).

4.2.3 Mass action

Shipments and labels can also be created using the mass action *Create Hermes Shipping Labels* in the order grid:

```
Sales → Orders → Mass action "Create Hermes Shipping Labels"
```

This allows the creation of shipping labels with no further user input

- for all items contained in the order
- with the services selected during checkout
- with the default package type from the [Module configuration](#).

4.3 Printing a shipping label

The successfully retrieved shipping labels can be opened in several locations of the admin panel:

```
Sales → Orders → Mass action *Print shipping labels*  
Sales → Shipments → Mass action *Print shipping labels*  
Detail page of a shipment → Button *Print shipping label*
```

The exact names of the menu entries can differ slightly, depending on the installed Language Pack. However, this is not important for the usage.

4.4 Get Hermes tracking link

For Hermes shipments, the tracking link can be retrieved here:

```
Shipment detail page → Section "Shipping and tracking information"
```

Click the desired shipment number.

You will see a new window containing the shipment status and a URL to the Hermes tracking system.

Note

Shipment tracking is only available in production mode.

4.5 Canceling a shipment

You can click the link *Delete* in the box *Shipping and tracking information* next to the tracking number. However, this will *not* cancel the shipment at Hermes. It only removes the tracking number from Magento®.

To completely cancel a shipment, please use the Hermes website.

Note

If only the tracking numbers are removed from Magento®, Hermes will still charge you for the shipment.

4.6 Automatic shipment creation

The process for creating shipments manually can be too time-consuming or cumbersome for merchants with a high shipment volume. To make this easier, you can automate the process of creating shipments and transmitting them.

Enable the automatic shipment creation in the [Module configuration](#) and select the order status to be processed.

Note

The automatic shipment creation requires working Magento® cron jobs.

All orders which are ready for shipping (based on the configuration) will be collected regularly and transmitted to Hermes.

If the transmission was successful, the label will be stored in Magento® and the Magento® shipments will be created.

Error messages will be shown in the Cron log. No Magento® shipment will be created in case of errors.

4.7 Pickup orders

You can trigger pickup orders via the Magento® admin panel to have parcels picked up by Hermes.

[Add New Pickup Order](#)

Filters Default View

2 records found

20 per page < 1 of 1 >

Pickup order ID	Pickup date	Pickup time slot	Pickup parcel count
57292000002	Oct 20, 2017 12:00:00 AM	Noon: 12:00 - 15:00	XS: 1 S: 3 M: 1 XL: 12
57313000077	Nov 15, 2017 12:00:00 AM	Noon: 12:00 - 15:00	XS: 1 M: 3 L: 1

In the Magento® 2 admin panel, go to:

Sales → Hermes → Pickup orders

To create a new pickup order, click *Add New Pickup Order*.

You will get to a new page on which you can choose the desired date, time, and number of parcels. After entering the data, click *Save*. The pickup order will then be transmitted to Hermes.

The pickup orders are **not** linked to the existing Hermes shipments in Magento®. Therefore, the type and number of parcels needs to be entered for the pickup order.

Edit or cancel a pickup order

Pickup orders cannot be edited or canceled via the Magento® admin panel. Please use the Hermes website to do this.

4.8 Troubleshooting

During the transmission of shipments to Hermes, errors can occur. These are often caused by an invalid address or an invalid configuration.

When creating shipments manually, the error message will be directly visible in the popup. You might have to scroll up inside the popup to see the message.

If the logging is enabled in the Module Configuration, you can also check the shipments in the Magento® log files.

Erroneous shipment requests can be corrected as follows:

- In the popup window for selecting the package articles, you can correct invalid information directly.
- On the detail page of the order or shipment, you can edit the receiver address and correct any errors. Use the link *Edit* in the box *Shipping address*.

Shipping Address [Edit](#)

Veronica Costello
6146 Honey Bluff Parkway
Calder, Michigan, 49628-7978
Vereinigte Staaten
T: (555) 229-3326

Afterwards, save the address. If the error has been corrected, you can retry [Creating a shipment](#).

If a shipment has already been transmitted successfully via the webservice, but you want to make changes afterwards, please cancel the shipment first as described in the section [Canceling a shipment](#). Then click *Create shipping label...* inside the same box *Shipping and tracking information*. From here on, the process is the same as described in [Creating a shipment](#).

5 Uninstalling the module

To uninstall the module, follow these steps described in the file *README.md* from the module package.

The *README.md* is linked in the section [Requirements](#).

6 Technical support

In case of questions or problems, please have a look at the Support Portal (FAQ) first:

<http://hermes.support.netresearch.de/>

If the problem cannot be resolved, you can contact the support team via the Support Portal or by sending an email to hermes.support@netresearch.de