



Order Manager for Magento 1

Online Version

An online version of this user manual can be found [here](#).

Quick Links

This User Manual is structured in the following sections:

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Install + Set Up (User Manual)

Go to **System > Configuration > Fooman Order Manager** to configure your Magento settings.

We indicate which features are available on which version of Fooman Order Manager in the following way: (v1.0.0+).

There are five settings groups to configure:

- [Order Manager Settings](#)
- [Invoice Selected Action Settings](#)
- [Ship Selected Action Settings](#)
- [Invoice and Ship Selected Action Settings](#)
- [Status Update Action Settings](#)

Order Manager Settings

Preselected Carrier	Custom Carrier	[GLOBAL]
Name of Custom Carrier	Custom Value	[GLOBAL]
Display Carrier Column	Yes	[GLOBAL]
Display Tracking Column	Yes	[GLOBAL]
Display Shipping Address	No	[GLOBAL]
Display Shipping Information	Yes	[GLOBAL]

Preselected Carrier (v2.0.0+)

Choose a default shipping carrier. This can be manually changed for individual orders on the Order Overview Screen, when Display Carrier Column setting (below) is set to “Yes”.

Note: A standard Magento store only has one custom carrier. If your website has already been customised to include multiple custom carriers, these will become available in a dropdown menu once Fooman Order Manager is installed.

Name of Custom Carrier (v2.0.0+)

If you use the custom carrier option (whether or not it is the “Preselected Carrier” above), enter a name here. Otherwise, leave this field blank.

Display Carrier Column (v2.2.7+)

When set to “Yes”, the carrier column will be displayed on the Order Overview Screen. Use this setting if you want to enter individual shipping carriers from the Order Overview Screen.

Display Tracking Column (v2.2.7+)

When set to “Yes”, the tracking column will be displayed on the Order Overview Screen. Use this setting if you want to enter individual tracking numbers from the Order Overview Screen.

Display Shipping Address (v2.2.10+)

When set to “Yes”, the shipping address will be displayed on the Order Overview Screen.

Display Shipping Information (v2.3.0+)

When set to “Yes”, shipping information (carrier and price) will be displayed on the Order Overview Screen.

Invoice Selected Action Settings

Invoice Selected Action		
Enabled	Yes	[GLOBAL]
New Status	Default	[GLOBAL]
Send Email	No	[GLOBAL]
Keep Order Selection	No	[GLOBAL]

Enabled (2.3.0+)

When set to “Yes” (default), the ‘invoice selected’ action will be shown in the Action List on the Order Overview screen. If set to “No”, it will not show up in the Action List on the Order Overview screen.

New Status (v2.0.8+)

Select the new status that will be allocated to all selected orders once the order has been invoiced.

Choose from the following status options:

- Default (assigns a new status according to Magento's standard workflow)
- Canceled
- Closed
- Complete
- Suspected fraud

- On hold
- Payment review
- Pending
- Pending payment
- Pending Paypal
- Processing

Send Email (v2.0.0+)

When set to “Yes”, this setting has the same effect as if you had checked the box “Email Copy of Invoice” when processing each order individually. Any emails that would normally be sent when processing an individual order will still be sent as normal, according to your Sales Emails settings.

Paid Amount \$0.00	Refund Amount \$0.00	Shipping Amount \$0.00	Shipping Refund \$0.00	Order Grand Total \$38,481.43
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Invoice History
 Invoice Comments

Invoice Totals

Subtotal	\$35,525.80
Shipping & Handling	\$165.00
Tax	\$2,790.63
Grand Total	\$38,481.43

Append Comments ☐
 Email Copy of Invoice ☒

Keep Order Selection (2.3.0+)

When set to “Yes”, any orders you selected using the checkbox on the Order Overview screen will stay selected after this action has been completed. This is handy if you want to perform multiple functions - e.g. first invoice the selected orders, then ship them/update other details.

Ship Selected Action Settings

Ship Selected Action		
Enabled	Yes	[GLOBAL]
New Status	Default	[GLOBAL]
Send Email	No	[GLOBAL]
Keep Order Selection	No	[GLOBAL]

Enabled (2.3.0+)

When set to “Yes” (default), the ‘ship selected’ action will be shown in the Action List on the Order Overview screen. If set to “No”, it will not show up in the Action List on the Order Overview screen.

New Status (v2.0.8+)

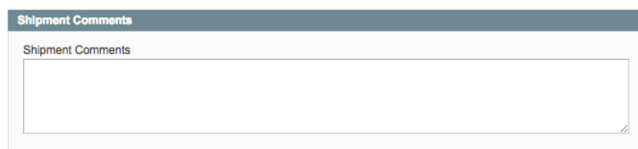
Select the new status that will be allocated to all selected orders once the order has been marked as shipped.

Choose from the following status options:

- Default (assigns a new status according to Magento's standard workflow)
- Canceled
- Closed
- Complete
- Suspected fraud
- On hold
- Payment review
- Pending
- Pending payment
- Pending Paypal
- Processing

Send Email (v2.0.0+)

When set to “Yes”, this setting has the same effect as if you had checked the box “Email Copy of Shipment” when processing each order individually. Any emails that would normally be sent when processing an individual order will still be sent as normal, according to your Sales Emails settings.



Keep Order Selection (2.3.0+)

When set to “Yes”, any orders you selected using the checkbox on the Order Overview screen will stay selected after this action has been completed.

Invoice and Ship Selected Action Settings

Invoice and Ship Selected Action		
Enabled	Yes	[GLOBAL]
New Status	Default	[GLOBAL]
Send Invoice Email	No	[GLOBAL]
Send Shipment Email	No	[GLOBAL]
Keep Order Selection	No	[GLOBAL]

Enabled (2.3.0+)

When set to “Yes” (default), the ‘invoice and ship selected’ action will be shown in the Action List on the Order Overview screen. If set to “No”, it will not show up in the Action List on the Order Overview screen.

New Status (v2.0.8+)

Select the new status that will be allocated to all selected orders once the order has been invoiced and marked as shipped.

Choose from the following status options:

- Default (assigns a new status according to Magento's standard workflow)
- Canceled
- Closed
- Complete
- Suspected fraud
- On hold
- Payment review
- Pending
- Pending payment
- Pending Paypal
- Processing

Send Invoice Email (v2.0.0+)

When set to “Yes”, this setting has the same effect as if you had checked the box “Email Copy of Invoice” when processing each order individually. Any emails that would normally be sent when processing an individual order will still be sent as normal, according to your Sales Emails settings.

Send Shipment Email (v2.0.0+)

When set to “Yes”, this setting has the same effect as if you had checked the box “Email Copy of Shipment” when processing each order individually. Any emails that would normally be sent when processing an individual order will still be sent as normal, according to your

Sales Emails settings.

Keep Order Selection (2.3.0+)

When set to “Yes”, any orders you selected using the checkbox on the Order Overview screen will stay selected after this action has been completed.

Status Update Action Settings

Status Update Action		
Enabled	Yes	[GLOBAL]
Keep Order Selection	Yes	[GLOBAL]

Enabled (2.3.0+)

When set to “Yes” (default), the ‘status update’ action will be shown in the Action List on the Order Overview screen. If set to “No”, it will not show up in the Action List on the Order Overview screen.

Keep Order Selection (2.3.0+)

When set to “Yes”, any orders you selected using the checkbox on the Order Overview screen will stay selected after this action has been completed.

User permission settings

To set user permissions, go to **System > Permissions > Roles**.

Under “Role Resources”, you can set different permission settings to allow (or disallow) different users permission over the following mass actions:

- Mass Status Update
- Invoice + Ship Selected
- Ship Selected
- Invoice Selected

Default permission settings give the Admin access to all Fooman Order Manager settings. For users with limited roles, you will need to add in (the same as how standard Magento works).

Role Information

Role Info

Role Resources

Role Users

Edit Role 'Limited'

Role Scopes

Role Scopes

All

Roles Resources

Resource Access

Custom

Resources

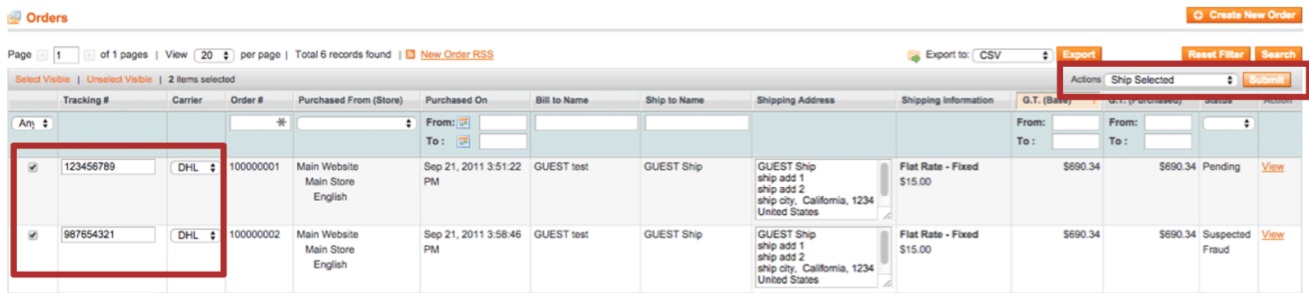
- ☐ Sales
- ☒ Fooman OrderManager - Mass Actions
 - ☒ Orders
 - ☒ Mass Actions
 - ☒ Invoice + Ship Selected
 - ☒ Mass Status Update
 - ☒ Ship Selected
 - ☒ Invoice Selected
- ☐ Dashboard
- ☐ Catalog
- ☐ Customers
- ☐ Promotions
- ☐ Newsletter
- ☐ CMS
- ☐ Reports
- ☐ System
- ☐ Global Search

Using Order Manager

Tracking Number and Carrier (v2.0.0+)

The shipping tracking number and shipping carrier (automatically imported from the order information) should be updated together.

1. Select the order/s, then select a shipping carrier from the drop down list and enter the shipping tracking number/s (if applicable, multiple tracking numbers associated with the same order may be entered if separated by a semi colon, eg: 123456789; 135792468). Under "Actions", click "Ship Selected".

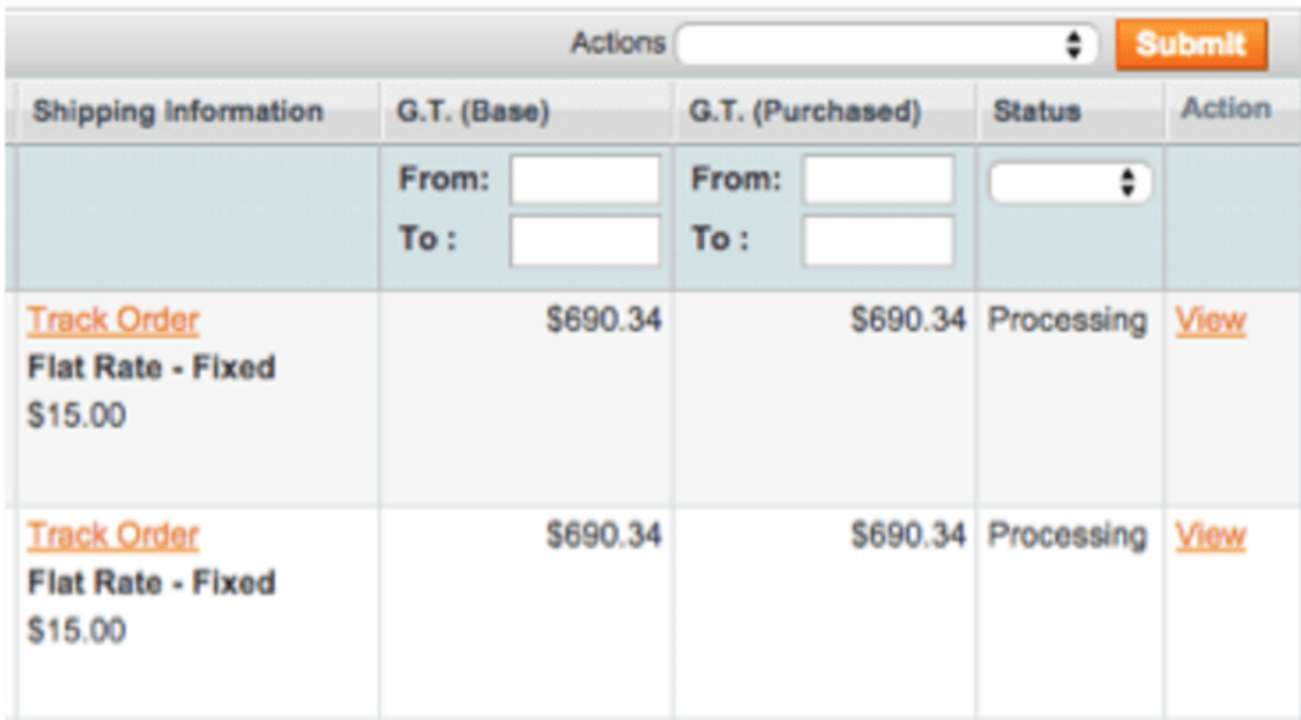


The screenshot shows the 'Orders' section of the Magento Order Manager. It displays a table with columns: Tracking #, Carrier, Order #, Purchased From (Store), Purchased On, Bill to Name, Ship to Name, Shipping Address, Shipping Information, G.T. (Base), G.T. (Purchased), Status, and Action. Two orders are selected, highlighted with a red box. The 'Actions' column for these orders shows a dropdown menu with 'Ship Selected' and a 'Submit' button.

Tracking #	Carrier	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	Shipping Address	Shipping Information	G.T. (Base)	G.T. (Purchased)	Status	Action
123456789	DHL	100000001	Main Website Main Store English	Sep 21, 2011 3:51:22 PM	GUEST test	GUEST Ship	GUEST Ship ship add 1 ship city, California, 1234 United States	Flat Rate - Fixed \$15.00	\$690.34	\$690.34	Pending	View
987654321	DHL	100000002	Main Website Main Store English	Sep 21, 2011 3:58:46 PM	GUEST test	GUEST Ship	GUEST Ship ship add 1 ship city, California, 1234 United States	Flat Rate - Fixed \$15.00	\$690.34	\$690.34	Suspected Fraud	View

2. Under "Actions", click "Ship Selected".

3. A confirmation message will be displayed confirming the shipment was successful. Magento shipment tracks with the tracking number and carrier information have been created for each newly created shipment.



The screenshot shows the 'Actions' dropdown menu for a selected order. The dropdown menu is open, showing options: Track Order, Flat Rate - Fixed \$15.00, G.T. (Base) \$690.34, G.T. (Purchased) \$690.34, Status Processing, and Action View.

Shipping Information	G.T. (Base)	G.T. (Purchased)	Status	Action
Track Order Flat Rate - Fixed \$15.00	\$690.34	\$690.34	Processing	View
Track Order Flat Rate - Fixed \$15.00	\$690.34	\$690.34	Processing	View

Shipping Address (v2.3.0+)

The shipping address is automatically imported from the order information (this cannot be edited from the Order Overview Screen).

Shipping Information (v2.3.0+)

Shipping information is automatically imported from the order information. When a tracking number is added to the order (see above), a new option called "Track Order" will be added to the shipping information column. When you click on "Track Order", a pop up box will be opened which displays the shipping carrier and tracking number.

Bulk Order Processing

When [set up in the Magento backend](#), Fooman Order Manager will execute the requested action for each selected order as if you had gone into each order individually and completed the action (invoice/ship/invoice and ship/status update) manually.

1. On the Order Overview Screen (**Sales > Orders**), select the orders to be processed.
2. Select one of the following actions from the drop down menu marked "Actions":
 - Invoice selected (Magento native invoices will be created for the selected orders)
 - Ship selected (Magento native shipments, with optional tracking information if entered, will be created for the selected orders)
 - Invoice and ship selected (Magento native invoices and shipments, with optional tracking information if entered, will be created for the selected orders)

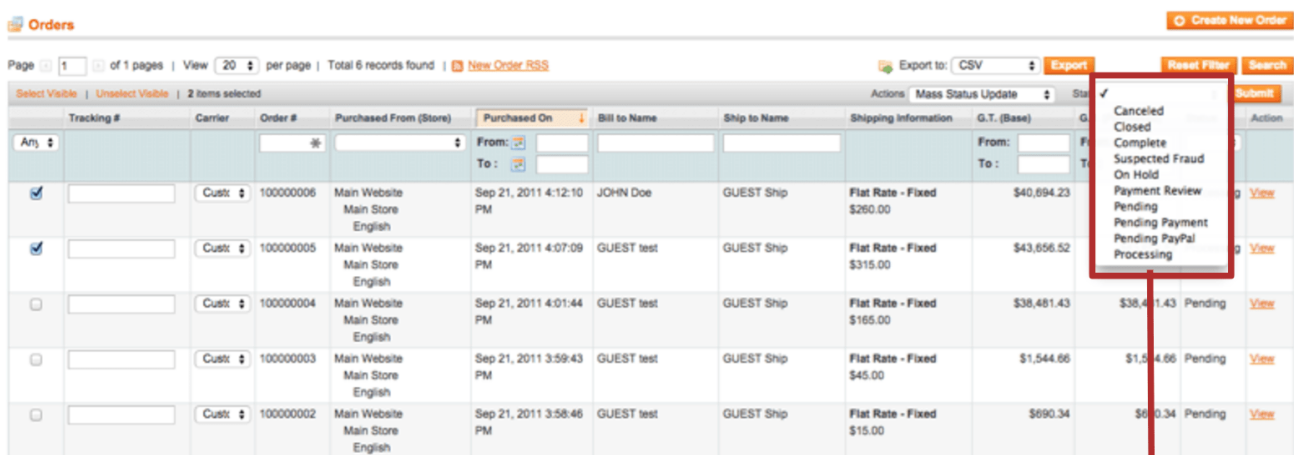
Bulk Order Status Updates

When [set up in the Magento backend](#), Fooman Order Manager will perform bulk status updates, as if you had gone into each order individually and updated the status manually.

1. On the Order Overview Screen (Sales > Orders), select the orders to be updated.
2. Select the "Mass status update" action from the drop down menu marked "Actions".

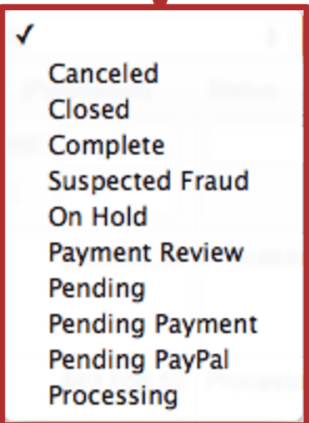
A new dropdown menu called "Status" appears. Choose the new status for the selected orders from the following options:

- Canceled
- Closed
- Complete
- Suspected fraud
- On hold
- Payment review
- Pending
- Pending payment
- Pending Paypal
- Processing



The screenshot shows the 'Orders' overview page in Magento. At the top, there's a 'Create New Order' button. Below it, a navigation bar includes 'Export to: CSV', 'Export', 'Reset Filter', and 'Search'. The main table lists orders with columns for Tracking #, Carrier, Order #, Purchased From (Store), Purchased On, Bill to Name, Ship to Name, Shipping Information, G.T. (Base), and Status. Two orders are selected, indicated by checkboxes. A dropdown menu is open from the 'Actions' column, showing 'Mass Status Update' as the selected option. A red box highlights the 'Status' dropdown menu, which lists the following options: Canceled, Closed, Complete, Suspected Fraud, On Hold, Payment Review, Pending, Pending Payment, Pending PayPal, and Processing. A red arrow points from this menu to a larger, detailed view of the same menu options.

Tracking #	Carrier	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	Shipping Information	G.T. (Base)	Status	Action
Any				From: To:						
☒		Cust: 100000006	Main Website Main Store English	Sep 21, 2011 4:12:10 PM	JOHN Doe	GUEST Ship	Flat Rate - Fixed \$260.00	\$40,694.23		View
☒		Cust: 100000005	Main Website Main Store English	Sep 21, 2011 4:07:09 PM	GUEST test	GUEST Ship	Flat Rate - Fixed \$315.00	\$43,656.52		View
☐		Cust: 100000004	Main Website Main Store English	Sep 21, 2011 4:01:44 PM	GUEST test	GUEST Ship	Flat Rate - Fixed \$165.00	\$38,481.43	\$38,481.43 Pending	View
☐		Cust: 100000003	Main Website Main Store English	Sep 21, 2011 3:59:43 PM	GUEST test	GUEST Ship	Flat Rate - Fixed \$45.00	\$1,544.66	\$1,544.66 Pending	View
☐		Cust: 100000002	Main Website Main Store English	Sep 21, 2011 3:58:46 PM	GUEST test	GUEST Ship	Flat Rate - Fixed \$15.00	\$690.34	\$690.34 Pending	View



A detailed view of the status dropdown menu, showing a list of status options with a checkmark next to 'Canceled'.

- ✓ Canceled
- Closed
- Complete
- Suspected Fraud
- On Hold
- Payment Review
- Pending
- Pending Payment
- Pending PayPal
- Processing

3. Click 'submit'. A success message will appear at the top of the screen when the action has been completed successfully.

Reporting Any Issues/Bugs

We are proud of our quality extension code - it's been widely tested and we stand by it 100%. If something does happen and you think you might be experiencing an issue or bug, please contact us via support@fooman.co.nz and we will help you out.