

USER MANUAL



Order Manager (Magento 2)

Online Version

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

Demo Store

A demo store is available to trial the settings of this extension:

- Frontend: ordermanager.demo-m2.fooman.co.nz
- Backend: ordermanager.demo-m2.fooman.co.nz/admin

User: demo

Password: demo123

Quick Links

This User Manual is structured in the following sections:

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Install + Set Up (User Manual)

Go to **Stores > Configuration > Sales > Order Manager** to configure your Magento settings.

Order Manager Settings

Preselected Carrier [global]	Custom carrier
Name of Custom Carrier [global]	Custom Value

Preselected Carrier

Choose a default shipping carrier. This can be manually changed for individual orders on the Order Overview Screen.

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

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.

Invoice Settings

Send Email [global]	Yes
New Status [global]	Default
Create Pdf [global]	No

Send Email

Send Email Options

Yes

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 Email
[global]

- ✓ Yes
- No
- Ask

Ask (v.8.2.0+)

When set to “Ask”, it folds out like this with option to ask to send email or no email directly from Sales Order Grid (available for Magento 2.2+)

Orders

Actions



80 records found (1 selected)

Cancel

Hold

Unhold

Print Invoices

Print Packing Slips

Print Credit Memos

Print All

Print Shipping Labels

Invoice

Ship

Invoice + Ship

Update Order Status

Purchase Date ↑

Bill-to N

Apr 9, 2019
9:01:57 PM

First Na
Name

Apr 9, 2019
9:01:57 PM

First Na
Name

Apr 9, 2019
9:01:57 PM

Orders

Actions ▲ 80 records found (1 selected)

- Cancel
- Hold
- Unhold
- Print Invoices
- Print Packing Slips
- Print Credit Memos
- Print All
- Print Shipping Labels
- Send Email**
- No Email
- Invoice + Ship
- Update Order Status

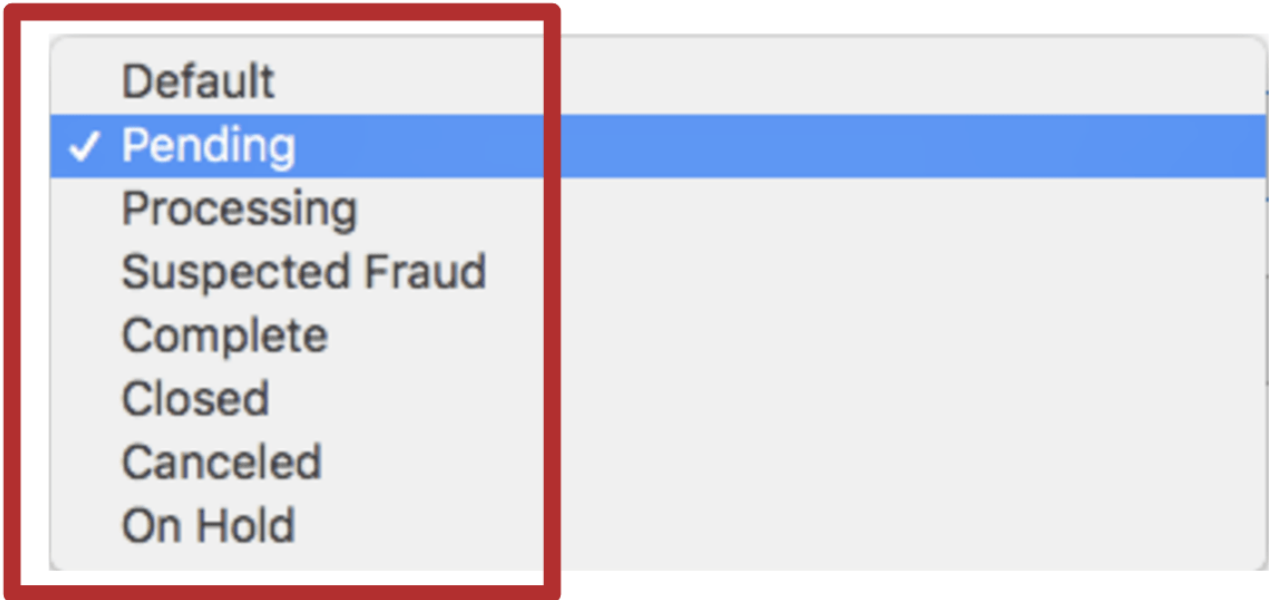
Purchase Date ↑	Bill-to Name
Apr 9, 2019 9:01:57 PM	First Name Last Name
Apr 9, 2019 9:01:57 PM	First Name Last Name
Apr 9, 2019 9:01:57 PM	

New Status (v.6.1.0+)

Based on your selection, when you perform the “Invoice” mass action from the orders overview page (**Sales > Orders > Actions**) the selected orders will be updated to the listed status here.

New Status Options

Select one of these options as your new status for the “Invoice” mass action. Please note using "Default" means that Order Manager does not set a status explicitly but lets Magento set the status according to its order processing logic.



Create PDF (v.6.1.0+)

When selected as “Yes”, this setting will generate a PDF Invoice for all selected orders.

Ship Settings

Send Email [global]	Yes	▼
New Status [global]	Default	▼
Create Pdf [global]	No	▼

Send Email

Send Email Options

Yes

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.

Ask (v.8.2.0+)

When set to “Ask”, it folds out with option to ask to send email or no email directly from Sales Order Grid (available for Magento 2.2+)

Orders

Actions ▲ 80 records found (1 selected)

- Cancel
- Hold
- Unhold
- Print Invoices
- Print Packing Slips
- Print Credit Memos
- Print All
- Print Shipping Labels
- Send Email**
- No Email**
- Invoice + Ship
- Update Order Status

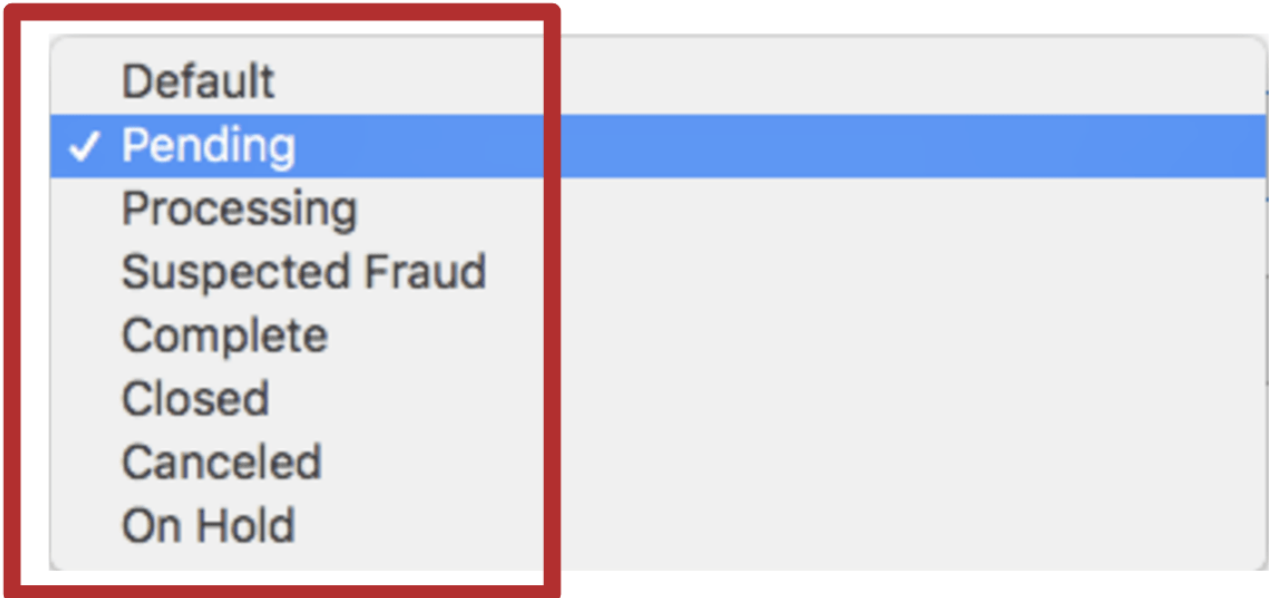
Purchase Date ↑	Bill-to Name
Apr 9, 2019 9:01:57 PM	First Name Last Name
Apr 9, 2019 9:01:57 PM	First Name Last Name
Apr 9, 2019 9:01:57 PM	First Name Last Name

New Status (v.6.1.0+)

Based on your selection, when you perform the “Ship” mass action from the orders overview page (**Sales > Orders > Actions**) the selected orders will be updated to the listed status here.

New Status Options

Select one of these options as your new status for the “Ship” mass action. Please note using “Default” means that Order Manager does not set a status explicitly but lets Magento set the status according to its order processing logic.



Create PDF (v.6.1.0+)

When selected as “Yes”, this setting will generate a PDF Packing Slip for all selected orders.

Invoice + Ship Settings

Send Invoice Email <small>[global]</small>	Yes	▼
Send Shipment Email <small>[global]</small>	Yes	▼
Create Pdf <small>[global]</small>	No	▼
New Status <small>[global]</small>	Default	▼

Send Invoice Email

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

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.

Create PDF (v.6.1.0+)

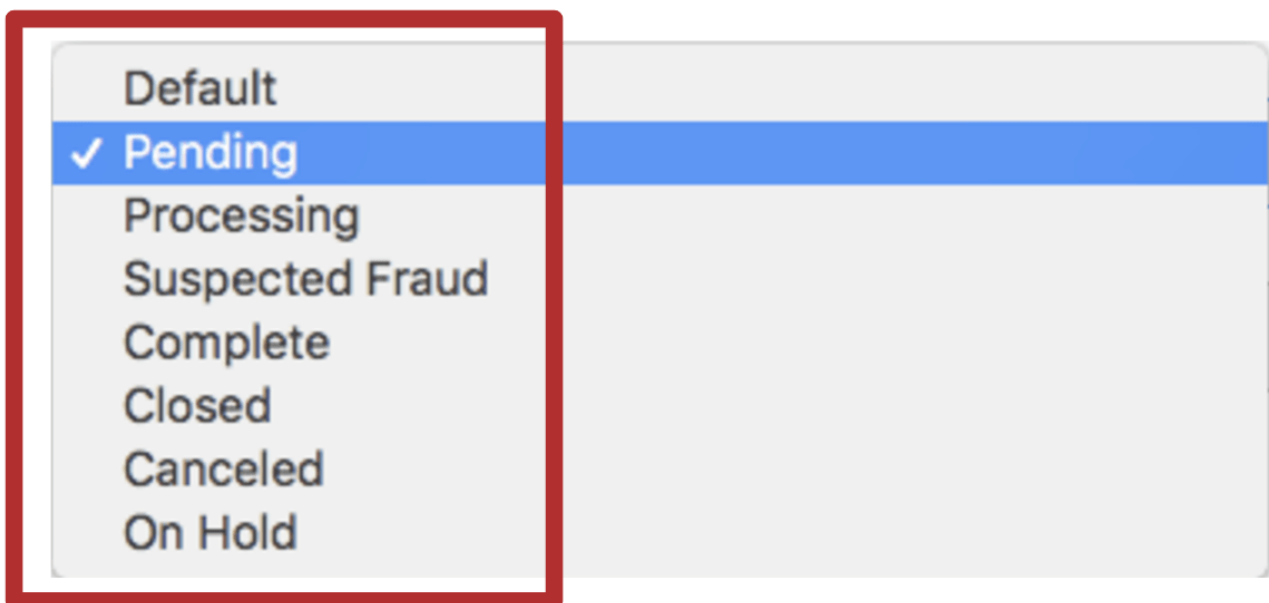
When selected as “Yes”, this setting will generate a PDF Invoice and Packing Slip for all selected orders.

New Status (v.6.1.0+)

Based on your selection, when you perform the “Invoice + Ship” mass action from the orders overview page (Sales > Orders > Actions) the selected orders will be updated to the listed status here.

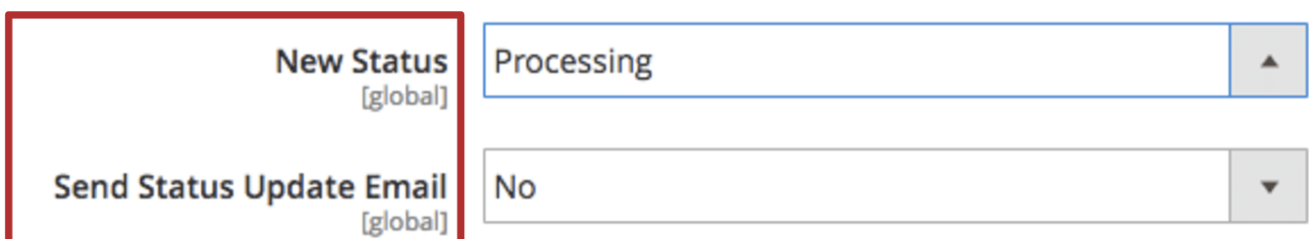
New Status Options

Select one of these options as your new status for the “Invoice + Ship” mass action. Please note using "Default" means that Order Manager does not set a status explicitly but lets Magento set the status according to its order processing logic.



A dropdown menu with a red border. The menu is open, showing a list of status options. The 'Pending' option is selected and highlighted with a blue background. The options are: Default, Pending (checked), Processing, Suspected Fraud, Complete, Closed, Canceled, and On Hold.

Update Order Status (v.6.10)



A form with two rows. The first row is labeled 'New Status [global]' and has a dropdown menu set to 'Processing'. The second row is labeled 'Send Status Update Email [global]' and has a dropdown menu set to 'No'. A red box highlights the labels and the 'Send Status Update Email' dropdown.

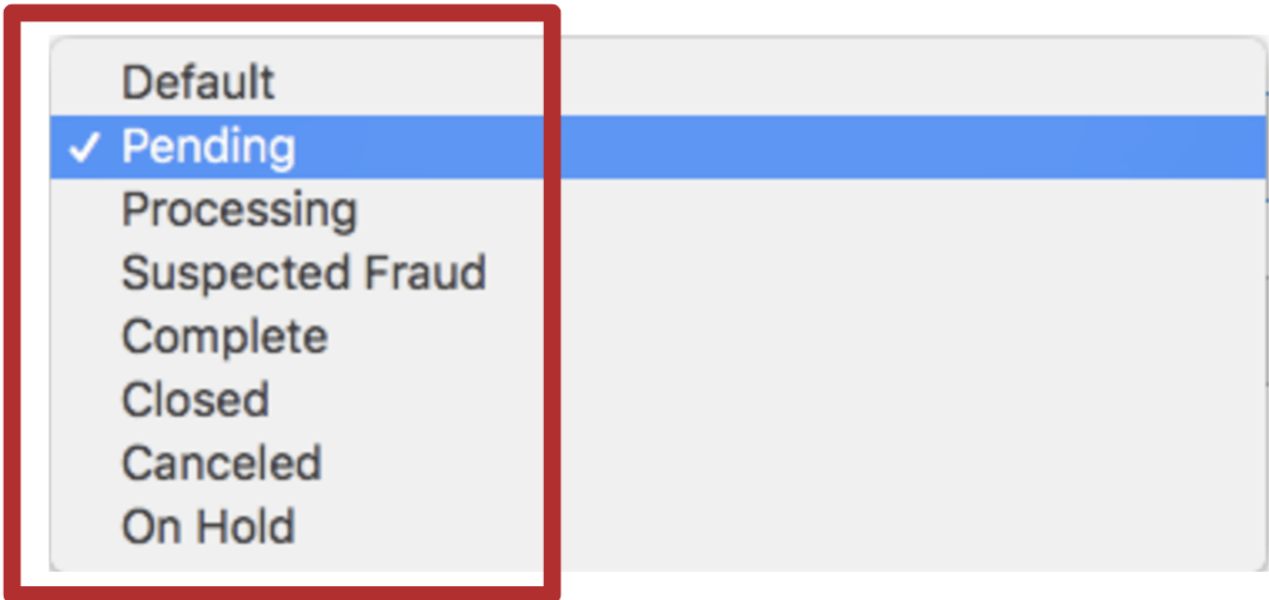
New Status

Based on your selection, when you perform the “Update Order Status” mass action from the orders overview page (**Sales > Orders > Actions**) the selected orders will be updated to the

listed status here.

New Status Options

Select one of these options as your new status for the “Update Order Status” mass action. Please note using "Default" means that Order Manager does not set a status explicitly and would only send a status update email if enabled.



Send Status Update Email

When set to “Yes” notifies the customer that their order status has changed and the current status of the order. For example:

From Sales <sales@example.com>
Subject **Update to your Main Website Store order**
To John Doe <JohnDoe_120339464@example.com>

Show headers ▼

HTML Plain text Source



John Doe,
Your order #000000026 has been updated with a status of **On Hold**. You can check the status of your order by [logging into your account](#).
If you have questions about your order, you can email us at support@example.com.

[About Us](#)
[Customer Service](#)

User permission settings

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

- Ship and Ship + Print use **Sales > Operations > Fooman Order Manager - Mass actions > Ship**
- Invoice and Invoice + Print use **Sales > Operations > Fooman Order Manager - Mass actions > Invoice**
- Invoice + Ship and Invoice + Ship + Print uses **Sales > Operations > Fooman Order Manager - Mass actions > Invoice + Ship**
- Update Order Status uses **Sales > Operations > Fooman Order Manager - Mass actions > Update Order Status**

Please note that the user additionally needs access to the Sales > Orders grid - which uses Sales > Operations > Orders

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).

Roles Resources

Resource Access

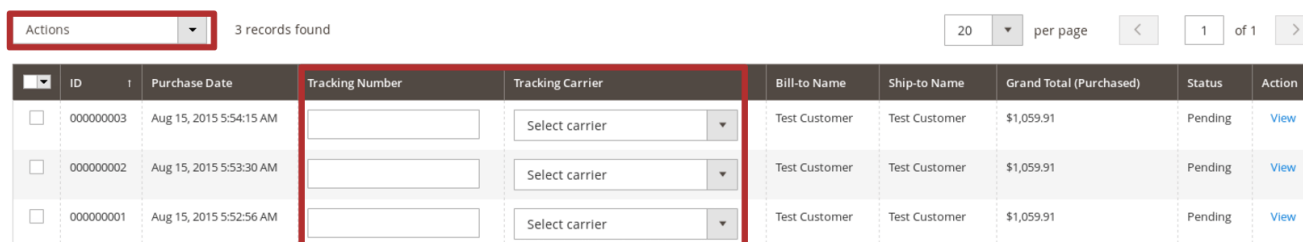
Resources

- Dashboard
- Sales
 - Operations
 - Orders
 - Invoices
 - Shipments
 - Credit Memos
 - Billing Agreements
 - Transactions
 - Fooman OrderManager - Mass actions
 - Invoice
 - Ship
 - Invoice + Ship
 - Update Order Status

Using Order Manager

Note: 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. Under "Actions", click "Ship".



The screenshot shows the Order Manager interface. At the top, there is a search bar with "Actions" selected, a "3 records found" indicator, and a pagination control showing "20 per page" and "1 of 1". Below this is a table with the following columns: ID, Purchase Date, Tracking Number, Tracking Carrier, Bill-to Name, Ship-to Name, Grand Total (Purchased), Status, and Action. The table contains three rows of test data. The "Tracking Number" and "Tracking Carrier" columns for each row are highlighted with a red box, indicating where the user should enter tracking information. The "Tracking Carrier" column contains a dropdown menu with "Select carrier" as the current selection.

ID	Purchase Date	Tracking Number	Tracking Carrier	Bill-to Name	Ship-to Name	Grand Total (Purchased)	Status	Action
000000003	Aug 15, 2015 5:54:15 AM		Select carrier	Test Customer	Test Customer	\$1,059.91	Pending	View
000000002	Aug 15, 2015 5:53:30 AM		Select carrier	Test Customer	Test Customer	\$1,059.91	Pending	View
000000001	Aug 15, 2015 5:52:56 AM		Select carrier	Test Customer	Test Customer	\$1,059.91	Pending	View

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

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.

Bulk order processing

When set up in the [Magento configuration settings](#), 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) 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:** Magento native invoices will be created, a custom order status is applied and PDF is generated for the selected orders
- **Ship:** Magento native shipments, with optional tracking information if entered, will be created, a custom order status is applied and PDF is generated for the selected orders
- **Invoice + Ship:** Magento native invoices and shipments, with optional tracking information if entered, a custom order status is applied and PDF's are generated for the selected orders
- **Update Order Status:** Magento will update the order status of selected orders to the New Order Status based on store configuration (further information on this below).

Any emails that would normally be sent when processing an individual order will still be sent

as normal, according to the Sales Emails settings.

The screenshot shows the 'Orders' management interface. The 'Actions' dropdown menu is open, displaying various options. A red box highlights the following options: 'Invoice + Print', 'Ship + Print', 'Invoice + Ship + Print', and 'Update Order Status'. A red arrow points from this box to a larger, magnified view of these four options below.

Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Tracking Number	Tracking Carr
d_1 view 1 - d_1 - 1								
roup 1 - d_1 view 1 - d_1 - 1	Jun 09, 2017, 12:06:00 PM	First Name Last Name	First Name Last Name	\$25.30	\$25.30	Pending	<input type="text"/>	Custom Va
roup 1 - d_1 view 1 - d_1 - 1	Jun 09, 2017, 12:06:00 PM	First Name Last Name	First Name Last Name	\$25.30	\$25.30	Pending	<input type="text"/>	Custom Va

Invoice + Print
Ship + Print
Invoice + Ship + Print
Update Order Status

Note: The + Print function (generate a PDF) (in the screenshot) of Invoice, Ship, and Invoice + Ship is optional and will only be shown if configured in the settings.

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.