



Navigate

AdvancedPurchaseOrder User Manual

v1.0.0

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Extension Overview

Advance or Planned purchase orders will allow both buyers and suppliers to have well-maintained stocks and delivery. For instance, when a buyer requires a total 'N' number of products throughout the year, he can have an advance purchase order with the supplier. Using this purchase order, a buyer can place an order as per his needs and demand the delivery promptly. This will allow users to pay for the products as per their needs and enable suppliers to manage the stock. It will make the supply chain and procurement assertive. Store admins can also handle this advance purchase ordering process from the backend.

On top of this, Magento does not provide any kind of authentication against the Purchase orders. This module will request the customer to enter a customer code and upload the document, making the user identification process easy for the admin and you can deliver the product confidently.



Extension Configurations

The below process explains you how to configure the extension in the backend and assess the features on the storefront.

Store Configurations

It is a place where you can configure the global settings of this module. Please read the field description offered on this page below:

- General Settings
 - Enable Module: Enable the module by selecting “Yes” from the drop-down.
 - Please note that you must enable the default Purchase Order module of Magento to see the below module fields. This module is dependent on that default Purchase Order module and has developed with an aim to extend its native functionalities.

- Enable for Admin Side: Choose either Yes or No option if the admin wants to use this advanced purchase order payment method in the backend while creating an order.
- Make Customer Code Required: Enable/Disable the “Customer Code” field required by selecting either “Yes” or “No” value.
- Customer Code Label: Amend the default “Customer Code” text to show it on the storefront as per your business requirement.
- Make Requested Delivery Date Required: Enable/Disable the “Requested Delivery Date” field required by selecting either “Yes” or “No” value.
- Requested Delivery Date Label: Allows the admin to change the default “Requested Delivery Date” text.
- Requested Delivery Date Format: Select the delivery date format as per you region. There are three (3) delivery formats offered by this module. Please find them below.
 - YY/MM/DD
 - DD/MM/YY



- MM/DD/YY
- Make PO Attachment Required: Enable/Disable the “PO Attachment” field required by selecting either “Yes” or “No” value.
- PO Attachment Label: Change the “PO Attachment” field label as per your business requirement.
- Allow File Types For PO Attachment: Add various file types in comma separated format to allow the user to upload the document on the checkout.
 - pdf,jpg,jpeg,png,doc,docx – These are the different file types that this module offers to choose from. You can mention either all or any specific format(s) for you customers.

General Settings



Enable Module <small>[website]</small>	Yes	<input checked="" type="checkbox"/> Use system value
Enable for Admin Side <small>[website]</small>	Yes	<input checked="" type="checkbox"/> Use system value
Make Customer Code Required <small>[website]</small>	Yes	<input checked="" type="checkbox"/> Use system value
Customer Code Label <small>[website]</small>	Customer Code	<input checked="" type="checkbox"/> Use system value
Make Requested Delivery Date Required <small>[website]</small>	No	<input checked="" type="checkbox"/> Use system value
Requested Delivery Date Label <small>[website]</small>	Requested Delivery Date	<input checked="" type="checkbox"/> Use system value
Requested Delivery Date Format <small>[website]</small>	YY/MM/DD	<input checked="" type="checkbox"/> Use system value
	<small>Select any Requested Delivery Date Format to use on the checkout page.</small>	
Make PO Attachment Required <small>[website]</small>	No	<input checked="" type="checkbox"/> Use system value
PO Attachment Label <small>[website]</small>	PO Attachment	<input checked="" type="checkbox"/> Use system value
Allow file types for PO Attachment <small>[website]</small>	pdf,jpg,jpeg,png,doc,docx	<input checked="" type="checkbox"/> Use system value
	<small>Please enter allow file types in comma (,) separated format. For eg. pdf,jpeg,png,doc,docx</small>	

Storefront Experience

The below information would demonstrate how this module would work on the frontend.



- Checkout Page – After configuring the settings of this module as per your requirement, navigate to the checkout page where all these configurations get reflected. See the below screenshots exhibiting the outcome of settings configured in the backend.

Requested Delivery Date

Requested Delivery Date Format (website) Use system value

Select any Requested Delivery Date Format to use on the checkout page.

Order Edit Page

This section exhibits the details related to the order being placed using the Advanced Purchase Order payment method from the storefront. It will also explain the details about



how the admin could place the order from the backend using the same PO payment method.

- The admin can review the details of PO entered by the customer while placing an order.

- PO Attachment link: The admin can also review the document by clicking on the “Click here” link that the customer has uploaded while checking out.

Payment & Shipping Method

Payment Information

Purchase Order

Purchase Order Number	navi1234
Customer Code	navi7890
Requested Delivery Date	2022/04/29
PO Attachment	Click Here

The order was placed using USD.



Place An Order From The Backend

Go through the below steps to place an order using the Advanced Purchase Order payment method from the backend.

- Let's first place an order by enabling the "Enable For Admin Side" setting shown on the module's global configuration page.

Enable for Admin Side [website] Use system value

Create New Order for Veronica Costello in Default Store View

Cancel Submit Order

Order Currency:

Customer's Activities

Shopping Cart (1)

Item	Qty	Price		
Hero Hoodie	0	\$54.00	<input type="checkbox"/>	<input type="checkbox"/>

Clear Shopping Cart

Items Ordered Add Products

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Ina Compression Short SKU: WSH11-28-Blue	\$49.00	<input type="text" value="1"/>	\$49.00	\$0.00	\$49.00	Please select
		<input type="checkbox"/> Custom Price*		<input checked="" type="checkbox"/> Apply		
Configure						
Total 1 product(s)			Subtotal:	\$49.00	\$0.00	\$49.00

* - Enter custom price excluding tax

Apply Coupon Code → Update Items and Quantities

Cancel Submit Order

Payment & Shipping Information

Payment Method

Check / Money order

Cash On Delivery

Purchase Order

Purchase Order Number *

Customer Code *

Requested Delivery Date

PO Attachment

Choose File no file selected

(File Types Allowed: pdf, jpg, jpeg, png, doc, docx; Max file size: 2MB)

Shipping Method *

[Get shipping methods and rates](#)



Create New Order for Veronica Costello in Default Store Vi... Cancel Submit Order

Payment & Shipping Information

Payment Method

Check / Money order
 Cash On Delivery
 Purchase Order

Purchase Order Number *

This is a required field.

Customer Code *

This is a required field.

Requested Delivery Date

PO Attachment

no file selected
(File Types Allowed: pdf, jpg, jpeg, png, doc, docx; Max file size: 2MB)

Shipping Method *

Flat Rate
Fixed - \$5.00

[Click to change shipping method](#)

- Now, let's navigate back to the global configuration page and disable this module for the backend. So, the admin won't see any of those PO fields in the backend while creating an order on behalf of the customer.

Enable for Admin Side Use system value

[website]

Create New Order for Veronica Costello in Default... Cancel Submit Order

[Validate VAT Number](#) [Validate VAT Number](#)

Add to address book Add to address book

Payment & Shipping Information

Payment Method

Check / Money order
 Cash On Delivery
 Purchase Order

Purchase Order Number *

Shipping Method *

[Get shipping methods and rates](#)

