

Plumrocket Documentation

Auto Invoice and Shipment for Magento 2 v2.x Configuration

Configuring Auto Invoice and Shipment for Magento 2 Extension

In this section you will learn how to configure Auto Invoice and Shipment Extension for Magento 2.

Important Information:

For the Auto Invoice & Auto Shipping for Magento 2 Extension to function properly, make sure there is a Cron Job for Magento set up at your store. For more details how to configure Cron Job read article [How to setup a Cron Job](#).

General

Step-by-Step action:

Enable Extension: Select “Yes” to enable the extension or “No” to disable it.

1. **“Marketplace Order ID”**: enter your Marketplace order ID in this field. It can be found at your Marketplace account or received in the email.
2. **“Marketplace Account Email”**: enter your email used during the purchase on the Marketplace platform.
3. Press the **“Activate Extension”** button to activate your license.

Configuration

Scope: Default Config

Preview Page Preview Email Save Config

GENERAL

CATALOG

SECURITY

CUSTOMERS

SALES

PLUMROCKET

Auto Invoice & Shipment

Base Settings

General

Auto Invoice & Shipment v2.x.x was developed by Plumrocket Inc. For manual & video tutorials please refer to our online documentation.

Enable Extension [store view] Yes

Marketplace Order ID 4000025664

Marketplace Account Email johndoe@plumrocket.com

You can find Marketplace Order ID and Email in your Magento Marketplace Account. If you have any questions, please contact us at support@plumrocket.com

Activate Extension

Step-by-Step actions:

- Option **“Send Invoice Automatically”**: if the option is set to **“Yes”**, the invoice email will be sent automatically once the invoice is created.
- Option **“Send Shipment Email Automatically”**: if it is set to **“Yes”**, the shipment email will be sent automatically once the shipment is created.

Send Invoice Email Automatically [store view] Yes

If set to "Yes", invoice email will be sent automatically once the invoice is created.

Send Shipment Email Automatically [store view] Yes

If set to "Yes", shipment email will be sent automatically once the shipment is created.

Mass Actions

Mass Actions

In order to create shipment or invoice to multiple orders at once, follow the steps below. It can help decrease a significant amount of workload for admins.

Step-by-Step actions:

1. **“Shipment Comment”**: enter the comment you want to add when applying the “Create Shipment” mass action. The comment will be added to the created shipment.
2. **“Append Comment To Shipment Email”**: set to “Yes” to add the Shipment Comment to the Shipment Email sent to customers. If you do not want to add this comment, set it to “No”.
3. **“Invoice Comment”**: enter the comment you want to add when applying the “Create Invoice” mass action. The comment will be added to the created invoice.
4. **“Append Comment To Invoice Email”**: set to “Yes” to add the Invoice Comment to the Invoice Email sent to customers. If you do not want to add this comment, set it to “No”.
5. **“Invoice Capture Amount”**: this option allows you to select payment actions according to your payment method. Please, click [here](#) to read more about payment actions.
6. **“Save Config”**: press the Save Config button to save and apply all configurations.

Configuration 6 → Save Config

Mass Actions

1 →	Shipment Comment <small>[store view]</small>	<input type="text" value="This order is successfully shipped!"/>
2 →	Append Comment To Shipment Email <small>[store view]</small>	<input type="text" value="No"/>
3 →	Invoice Comment <small>[store view]</small>	<input type="text" value="The invoice is paid."/>
4 →	Append Comment To Invoice Email <small>[store view]</small>	<input type="text" value="No"/>
5 →	Invoice Capture Amount <small>[store view]</small>	<input type="text" value="Not Capture"/>

How to Create Invoice and Shipment in Bulk

In the main menu, go to the “Sales” tab > navigate to “Orders”.

Step-by-Step actions:

Select the orders to which you want to apply mass actions by checking the corresponding checkboxes in the Orders grid.

1. **“Actions”**: click on “Actions” to open a mass actions menu.
2. Click on the **“Creare Invoice”** or **“Create Shipment”** option to create an invoice or shipment for the selected orders.

The screenshot shows the 'Orders' management page. At the top, there is a 'Create New Order' button. Below it, a table displays 3 records, with 2 selected. The 'Actions' dropdown menu is open, showing options like 'Cancel', 'Hold', 'Unhold', 'Print Invoices', 'Print Packing Slips', 'Print Credit Memos', 'Print All', 'Print Shipping Labels', 'Create Invoice', and 'Create Shipment'. The 'Create Invoice' and 'Create Shipment' options are highlighted with a red box. A red circle with the number '1' points to the 'Actions' dropdown, and another red circle with the number '2' points to the 'Create Invoice' and 'Create Shipment' options.

Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action	Signifyd Guarantee Decision
Main Website Main Website Store Default Store View	Feb 17, 2021 12:21:33 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing	View	
Main Website Main Website Store Default Store View	Feb 17, 2021 12:21:33 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Closed	View	
Main Website Main Website Store Default Store View	Feb 17, 2021 12:23:17 PM	Veronica Costello	Veronica Costello	\$104.59	\$104.59	Complete	View	

Managing Auto Invoice Rules

In order to manage and configure Auto Invoice Rules, follow the instructions below.

Step-by-Step action:

1. This grid allows to manage and search for Auto Invoice Rules.
2. Press the **“Add New Rule”** button to create your new rule.

Manage Auto Invoice Rules 13 admin

2 → [Add New Rule](#)

Search [Reset Filter](#)

Actions ▾ 4 records found 20 ▾ per page < 1 of 1 >

▾	Rule ID	Rule Name	Website	Status	Priority	Action
Any ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>	
<input type="checkbox"/>	1	Default Auto Invoice Rule	Main Website	ACTIVE	0	Edit
<input type="checkbox"/>	2	Virtual Products Orders	Main Website	ACTIVE	0	Edit
<input type="checkbox"/>	3	Retailers	Main Website	ACTIVE	0	Edit
<input type="checkbox"/>	4	Order \$500+	Main Website	INACTIVE	0	Edit

Step-by-Step action:

1. **Specify the Rule Name in this field.**
2. **Option "Status":** enable or disable this rule using this option.
3. **Option "Create Invoice":** allows Admin to configure when an invoice should be created: "After order is created" or "After shipment is created".
4. **Option "Capture Amount":** allows you to specify how you will capture payments from your customers. **Magento** has 3 capture methods. See full description below.
5. **Option "Website":** allows Admin to select the website where the rule will be applied on.
6. **Option "Customer Groups":** select the customer groups the rule will be applied to.
7. **Option "Comment":** allows you to add the comment which will be displayed in the Invoice History.
8. **Option "Append Comment To Invoice Email":** enable or disable a comment notification displayed in the email.
9. **Option "Rules Priority":** enter the rules priority. The smaller the number entered – the higher is the priority. Rules with the highest priority will be used first.

10. Add the special conditions for your rule, or leave it blank if you want the rule to be applied to all the orders.

11. Press "Save" to save your changes.

The screenshot shows the 'New Auto Invoice Rule' configuration interface. A sidebar on the left contains navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Plumrocket, Reports, Stores, System, and Find Partners & Extensions. The main content area has a title 'New Auto Invoice Rule' and a search icon. In the top right corner, there is a notification bell with '11' and a user profile 'admin'. Below the title is a toolbar with buttons for 'Back', 'Reset', 'Save and Continue Edit', and 'Save'. The 'Save' button is highlighted with a red circle and an arrow labeled '11'. The form fields are numbered 1 through 10:

- 1: Rule Name * (Text input: Auto Invoice Rule #2)
- 2: Status * (Dropdown: Active)
- 3: Create Invoice * (Dropdown: After order is created)
- 4: Capture Amount * (Dropdown: Not Capture)
- 5: Website * (Text input: Main Website)
- 6: Customer Groups * (List: NOT LOGGED IN, General, Wholesale)
- 7: Comment (Text area: Invoice Created Automatically)
- 8: Append Comment To Invoice Email (Dropdown: Yes)
- 9: Rules Priority (Text input: 1)
- 10: Apply the rule only to orders matching the following conditions (leave blank for all orders)

Under condition 10, the text reads: 'If ALL of these conditions are TRUE:'. Below this, there are two conditions: 'Order Payment Method is Cash On Delivery' and 'Order Grand Total is 500'. Each condition has a red 'X' icon to its right. A green plus icon is visible at the bottom of the conditions list.

Managing Auto Shipment Rules

In order to manage and configure Auto Shipment Rules, follow this guide.

Step-by-Step action:

1. This grid allows to manage and search for Auto Shipment Rules.
2. Press the “Add New Rule” button to create your new rule.

Manage Auto Invoice Rules 13 admin

2 → Add New Rule

Search [Reset Filter](#)

Actions ▾ 4 records found **1** 20 ▾ per page < 1 of 1 >

▾	Rule ID	Rule Name	Website	Status	Priority	Action
Any ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>	
<input type="checkbox"/>	1	Default Auto Invoice Rule	Main Website	ACTIVE	0	Edit
<input type="checkbox"/>	2	Virtual Products Orders	Main Website	ACTIVE	0	Edit
<input type="checkbox"/>	3	Retailers	Main Website	ACTIVE	0	Edit
<input type="checkbox"/>	4	Order \$500+	Main Website	INACTIVE	0	Edit

In order to create new Shipment Rule, follow the guide above describing how to create a Auto Invoice Rule.

Invoice in the Order

The notification in the order can be viewed, if you go to Sales > Orders> Select the needed order > Navigate to the Invoice History section.

Step-by-Step action:

1. Once the invoice is created, admin will see the notification in the Invoice History.

#000000004

[← Back](#)
[Send Email](#)
[Print](#)

Ina Compression Short SKU: WSH11-28-Orange Size: 28 Color: Orange	\$49.00	1	\$49.00	\$4.04	\$0.00	\$53.04
Erika Running Short-29-Purple SKU: WSH12-29-Purple	\$45.00	1	\$45.00	\$3.72	\$0.00	\$48.72

Order Total

Invoice History

Comment Text

Notify Customer by Email

Visible on Storefront

Submit Comment

Invoice Totals

Subtotal	\$101.76.00
Shipping & Handling	\$15.00
Tax	\$7.76
Grand Total	\$124.52

Aug 16, 2017 5:09:22 AM | Customer **Notified**
 Invoice Was Created Automatically

← 1

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

PLUMROCKET

REPORTS

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Important Information:

For the Auto Invoice & Auto Shipping for Magento 2 Extension to function properly, make sure there is a Cron Job for **Magento** set up at your store. For more details how to configure Cron Job read article [How to setup a Cron Job](#).

