



Extension for *Magento 1*

# Automatic Invoice

User Guide

Version 1.x

The *Automatic Invoice* extension for the *Magento* online shop software offers automatic generation of invoices and shipments based on order status, product type and many other filter possibilities.

More details about the functionality of this module can be found on the product page at <http://www.vianetz.com/automaticinvoice>.

Take also a look to our **demo shop** to see the extension in action at <http://demo.vianetz.com/>.

Following you will find some information about the module. The screenshots are taken from the current *Magento* version 1.9.3.7.

More information, for example additional documentation for the *Magento* online shop is available on our website [vianetz.com](http://www.vianetz.com).

If you have any questions, problems or comments to our software please feel free to contact us via [info@vianetz.com](mailto:info@vianetz.com).

Furthermore we want to point to the fact that there can be no warranty that the information in this package and the related documents are complete, correct and current in either case.

A consultancy of a legal expert is required in either case.

Your feedback about this module will be received under [vianetz.com/en/contacts/](http://www.vianetz.com/en/contacts/). This is necessary for a continuous improvement of this kind of software.

Best regards from Munich,



Dipl.-Ing. Christoph Maßmann

## 1. Configuration of your order workflows in Magento Admin Panel

The Automatic Invoice Extension for Magento allows you to avoid the stupid clicking for generating invoice and shipment documents in the Magento backend and does the creation of these documents automatically for you.

After the installation of the extension via the Magento standard installation process you first have to do the configuration in order to notice any change in the workflows.

Therefore in Magento Admin Panel please go to *System > Configuration > Automatic Invoice*. Next to some general configuration options at the top of the page there are 2 sections for invoice and shipment generation configuration as follows:

**Automatic Invoice** Save Config

Trigger on Payment Methods and Order Status	Order Status	Payment Method	Generate	Trigger Email	Notify Customer	
	Pending	Cash On Delivery	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Delete"/> <input type="button" value="Add"/>

If order has the selected combination of order status and payment method the selected actions are executed:  
**Generate Invoice:** If activated an invoice document will be generated as soon as the order is in the appropriate status.  
**Trigger Email:** If activated the invoice transactional email will be send.

New Order Status:  [WEBSIT VIEW]  
 Only create if Grand Total = 0:  [STORE VIEW]  
 Use Order Comment as Invoice Comment:  [STORE VIEW]  
 Capture Case:  [STORE VIEW]  
 Invoice only items that are in stock:  [STORE VIEW]

If set to "Capture Offline" the invoice will be sent to your payment provider. Otherwise if you choose "Capture Offline" it will be a regular Magento offline invoice or in case "Not Capture" it will be marked as Pending.

If enabled only items that are currently in stock will be invoiced otherwise all items will be invoiced. This setting is e.g. useful if you use the option Allow

The most important setting is the "Trigger on Payment Methods and Order Status": Within this setting you configure one or more order status and payment method combinations that should trigger the actions "Generate Invoice", "Trigger Invoice Email" and "Notify Customer".

For example the configuration in the screenshot reads as: When an order with payment method "Cash on Delivery" changes its status to "Pending" the Automatic Invoice extension should automatically generate the invoice and trigger the email with notifying the customer.

You can configure as many combinations as you like for all your workflows and payment methods.

The small difference between triggering the email and notifying the customer is that you may have Magento configured to send invoice emails CC/BCC to your

store or inventory. In that case if you only activate the checkbox "Trigger Email" but not the checkbox "Notify Customer" the email will only be sent to the configured CC/BCC email addresses.

Optionally with the options below you can configure to only generate invoices for certain order amounts, set the order status after invoice generation and configure the capture case.

## 2. Monitoring the workflow execution

After you have completed configuring your workflows as described in step 1 you can now sit back and watch your orders coming in and being processed fully automatically.

Internally the Automatic Invoice extension uses the Magento cron to execute the configured workflows (like generating invoice, sending emails, etc.) that's why it is important to have setup the Magento cron job correctly. Please therefore see [http://devdocs.magento.com/guides/m1x/install/installing\\_install.html#install-cron](http://devdocs.magento.com/guides/m1x/install/installing_install.html#install-cron).

To monitor exactly what the Automatic Invoice extension does can be done via a log file. Therefore you have to activate the logging in *System > Configuration > Automatic Invoice > Enable Logging: Yes*.

Afterwards you have to wait a little bit until new orders come in and then you can monitor the file *var/log/Vianetz\_AutomaticInvoice.log* to see what the extension is doing.

## 3. Additional Resources

Please find additional information on our website [www.vianetz.com](http://www.vianetz.com), especially in our FAQs: <http://www.vianetz.com/en/magento-faq>.