ORDER MANAGER

Edit/delete orders, export orders to CSV/Excel/XML, customizable order listing page with quick view. All-in-one order management tool to manage your orders easily and effectively

A product of PrestaHero

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I. WELCOME

Thank you for purchasing our product. We hope to guide you through all the aspects of the module installation and the module setup within this document. If you have any questions that are beyond the scope of this documentation, please feel free to contact us.

Note:

All instruction screenshots are taken from PrestaShop 1.7, but installing and configuring this module on PrestaShop 1.6 is similar.

II. INTRODUCTION

You chose PrestaShop for your business because it's simple to use, quick to set up and it's one of the best ecommerce platforms out there. While PrestaShop helps you get the sales, it's quite difficult if you want to **edit an order or delete PrestaShop orders** as customer's demand. In addition, the default order export feature of PrestaShop is very restricted and couldn't satisfy your increasing requirement.

But don't be worried! We've developed **Order Manager** - an **innovative order management tool for PrestaShop** with useful features to help you solve all the problems with managing orders in PrestaShop e-commerce platform. **Order Manager** is an **all-in-one** PrestaShop order management tool to manage orders easily and effectively.

** "**Order Manager**" is compatible with PrestaShop 1.6.x, 1.7.x to PrestaShop 8.x*

III. INSTALLATION

1. Navigate to **“Modules / Modules & Services”,** click on **“Upload a module / Select file”**

2. Select the module file **“ets_ordermanager.zip”** from your computer then click on **“Open”** to install

3. Click on “**Configure**” button of the module you just installed to open the module’s configuration page

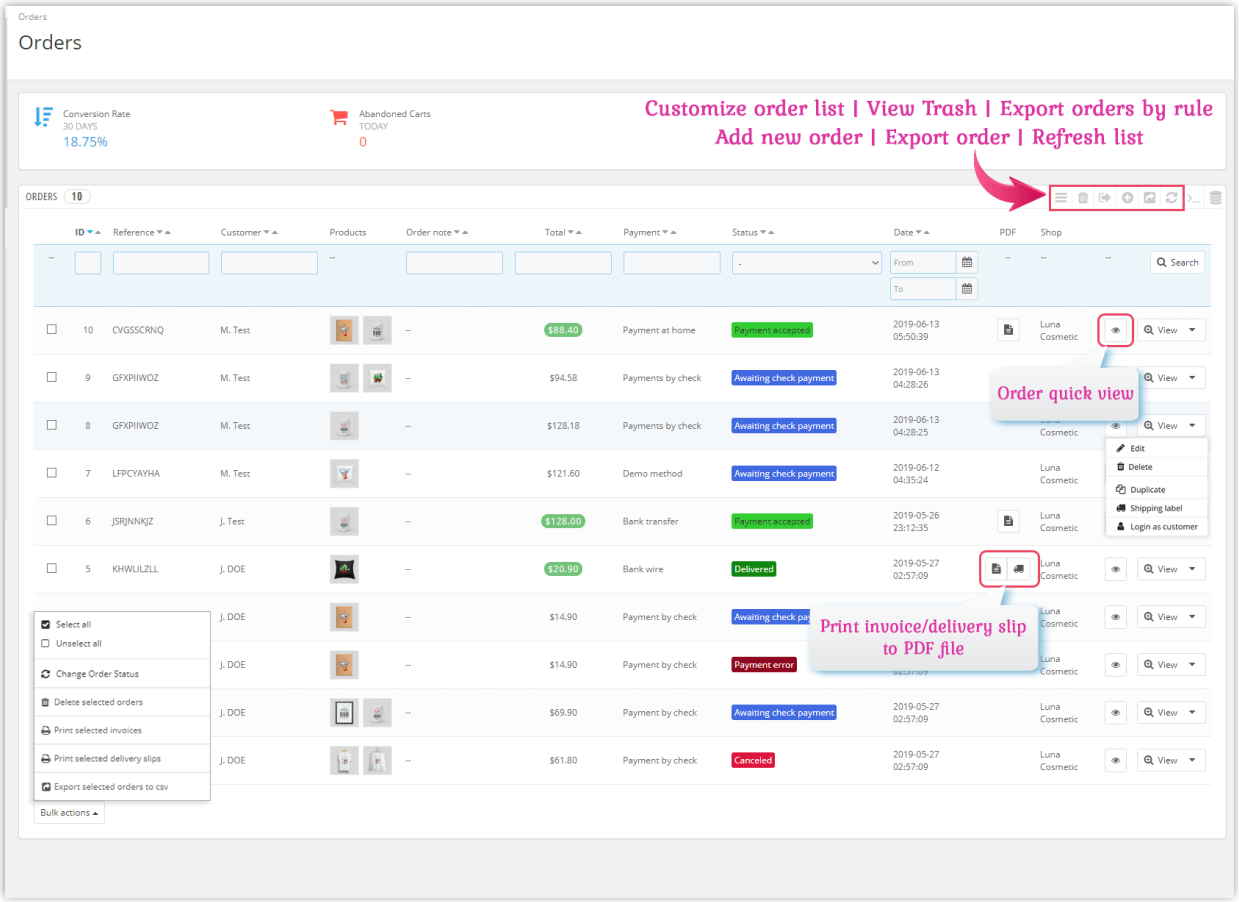
IV. MANAGE ALL EXISTING ORDERS

Order Manager is a powerful order management tool for PrestaShop. This module allows you to edit, delete or duplicate orders, quick view order and customizable order listing page with additional data fields. On this section, we will introduce to you all order management features of **Order Manager**.

From module’s configuration page, click on “**Manage orders**” tab to be navigated to “**Orders**” page.

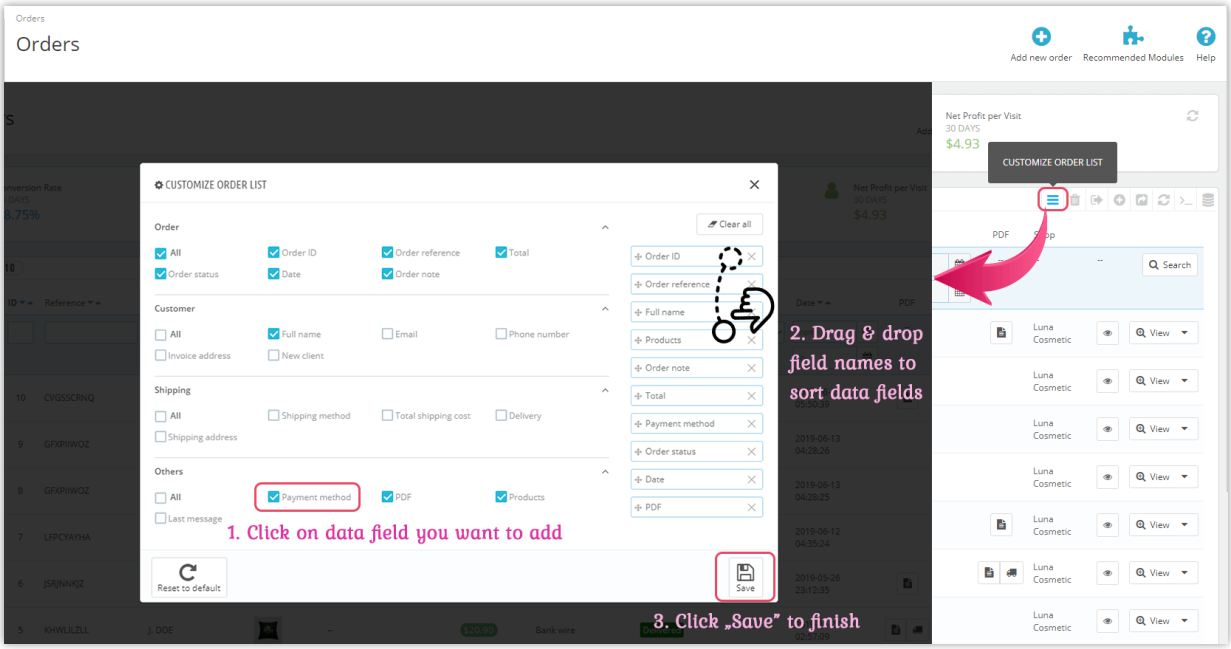
1. Customize orders listing page

From "**Orders"** page**,** you can see configuration buttons used to manage existing orders.



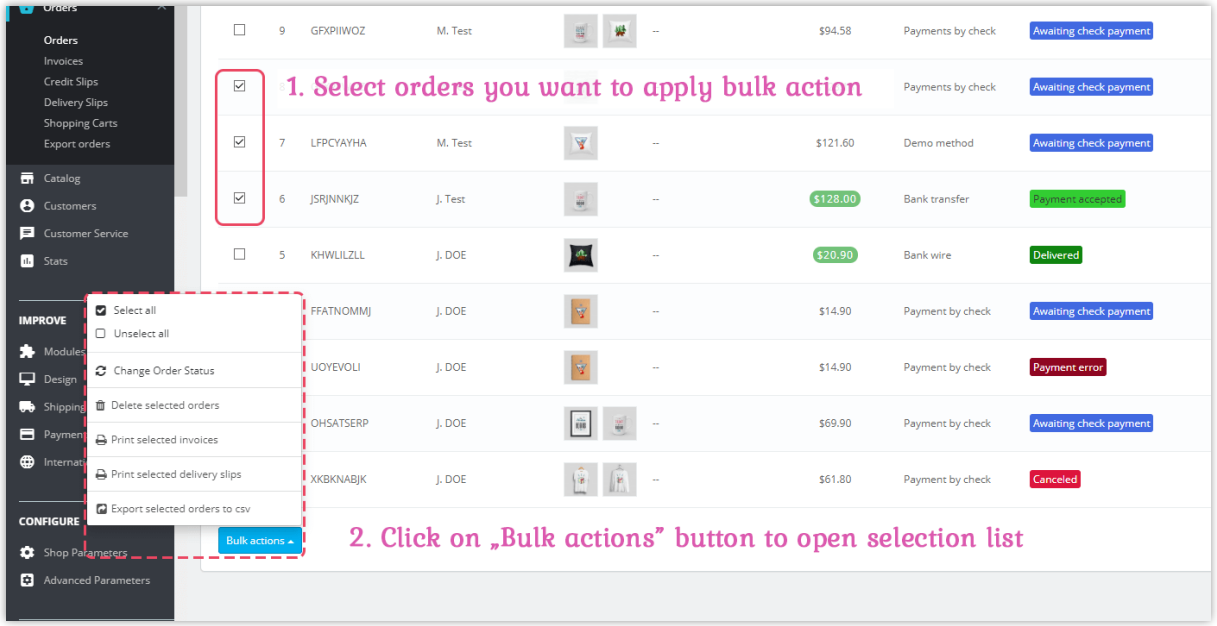
With **Order Manager** module, you can add more useful data fields to display on order listing page (for example: *shipping code, order added date, order delivery, shipping cost, shipping address*, etc.).

To add more data fields on order listing page, click on "**Customize order list**" icon to open the setting popup. You can select which fields to display and arrange them by dragging and dropping the field names



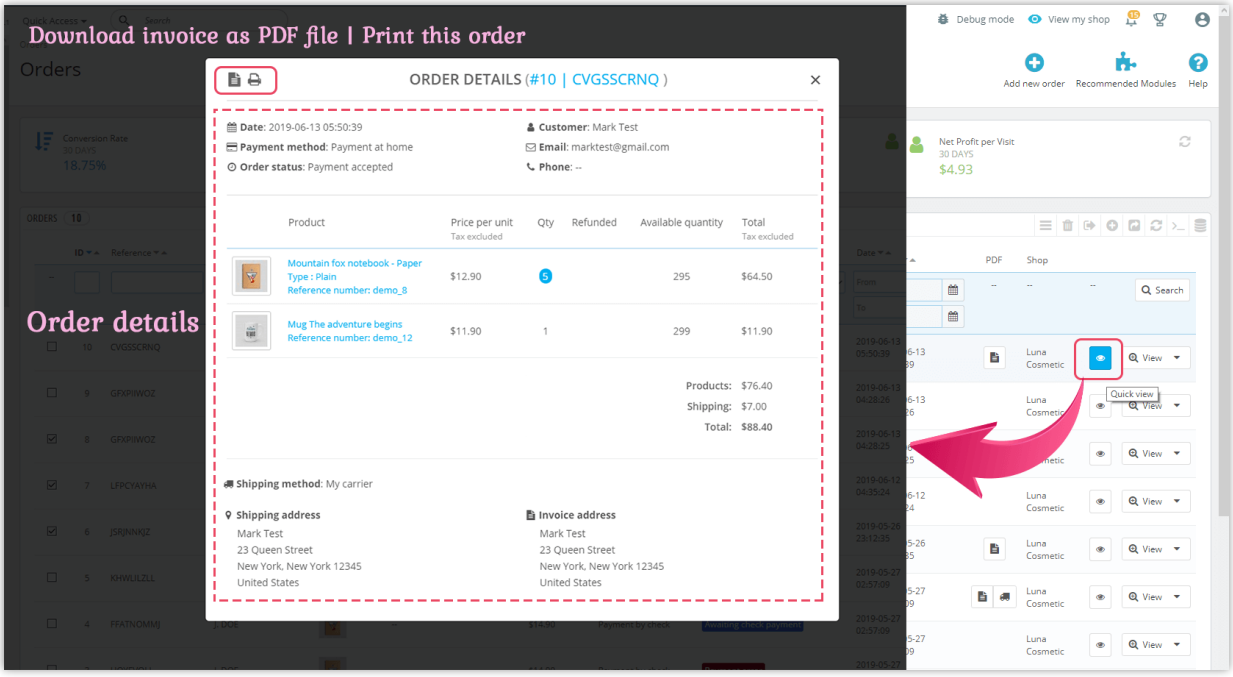
In addition, **Order Manager** also supports these following bulk actions for selected orders on order list:

- Change order status
- Print selected invoices/delivery slips
- Export orders to CSV file
- Delete orders



2. Convenient order quick view popup

Order Manager provides a quick view popup to help you view order details without opening a separate order page. From this popup you may download order invoice in PDF format or print order details.



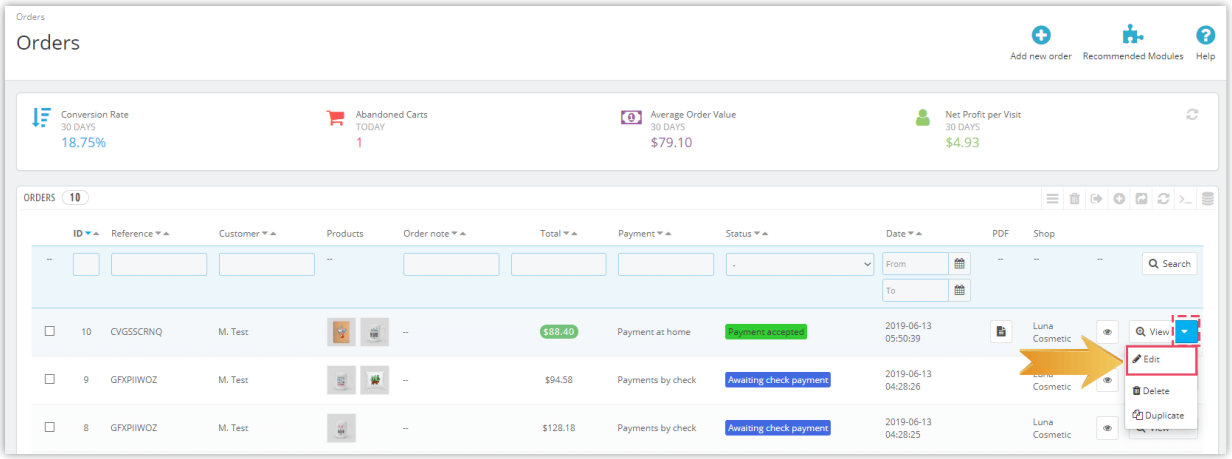
3. Edit an existing order and duplicate order

This edit PrestaShop order module allows you to **modify every type of order information** visible to you in PrestaShop back office thanks to **live editor** feature. For example, you may easily edit customer shipping address and invoice address, add/edit/delete product, assign an order to another customer, change order status, etc.

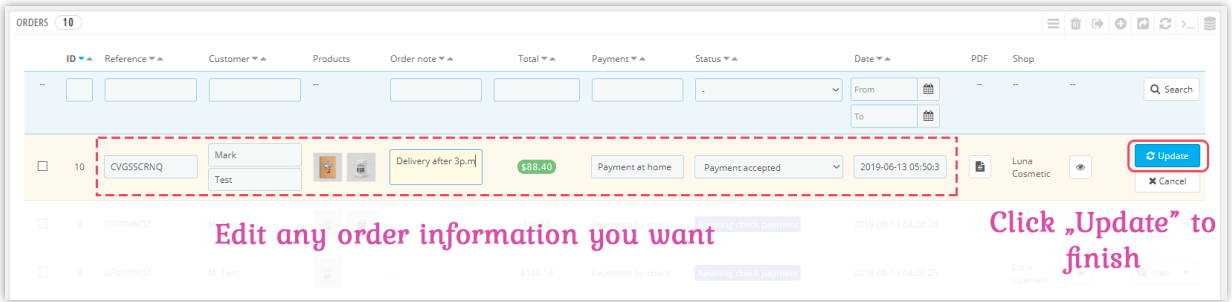
You can modify order data not only right on *order listing page* but also on *order details page*.

❖ *Edit order data on order listing page*

On order listing page, click on arrow button to open drop-down menu > Select “Edit”

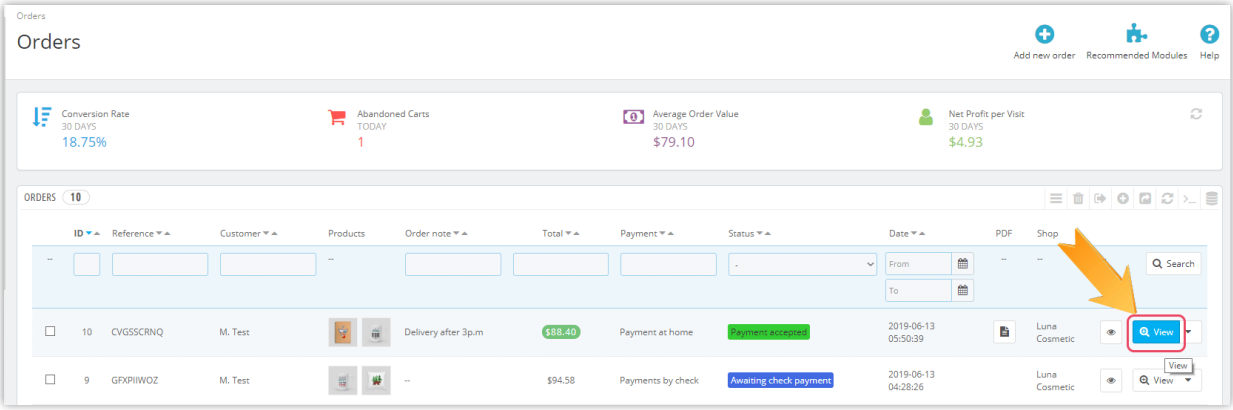


You can edit any order data visible to you > Click “Update” button to finish.



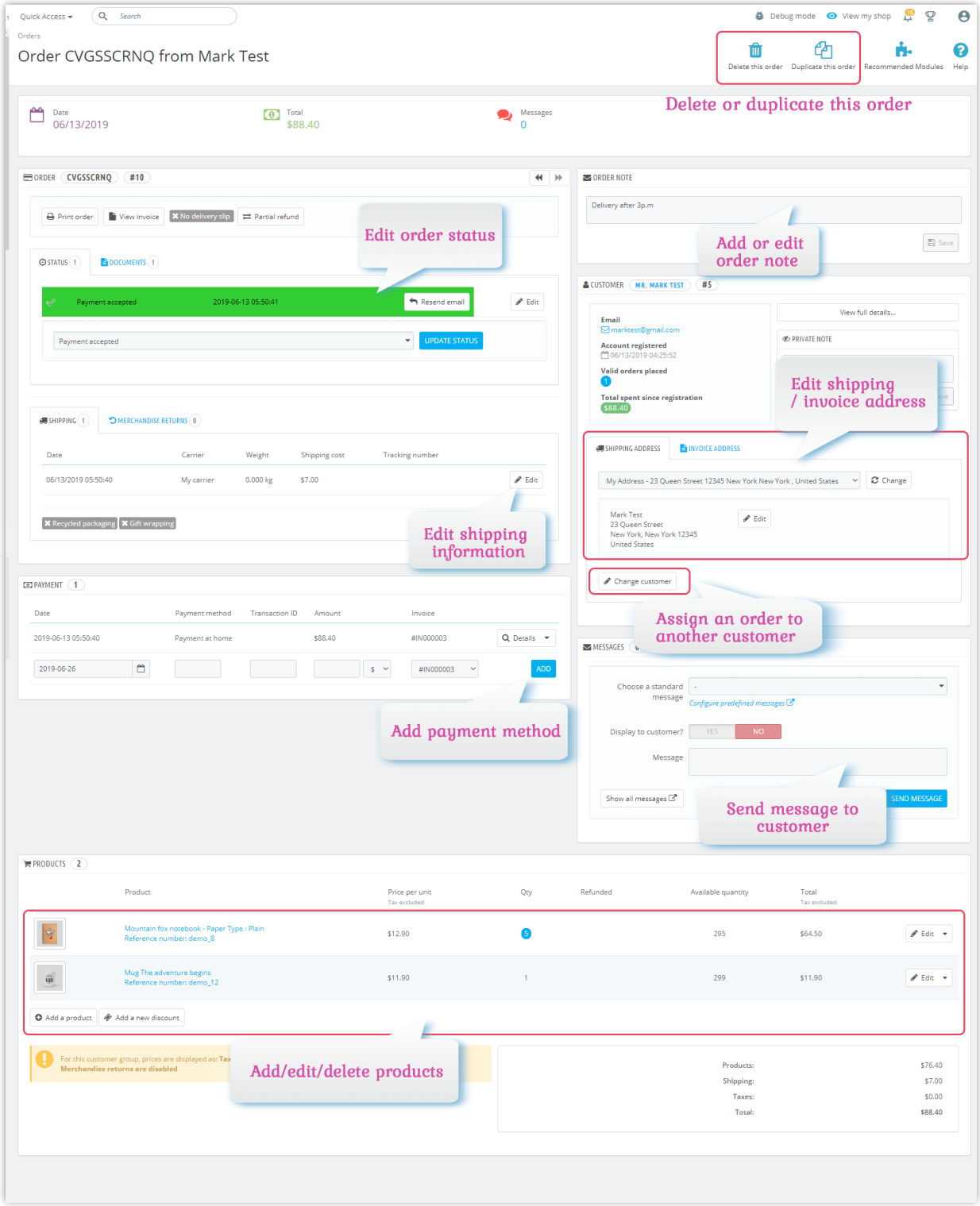
❖ *Edit order data on order details page*

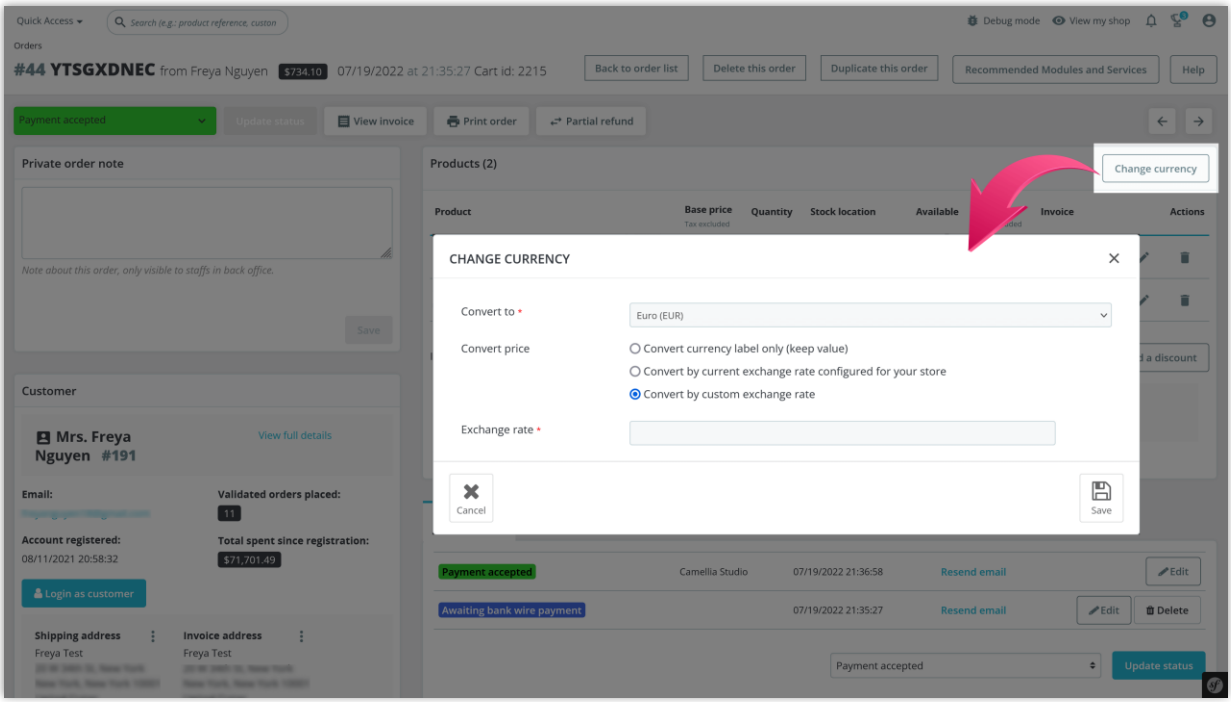
On order listing page, click on “View” button to open order details page.

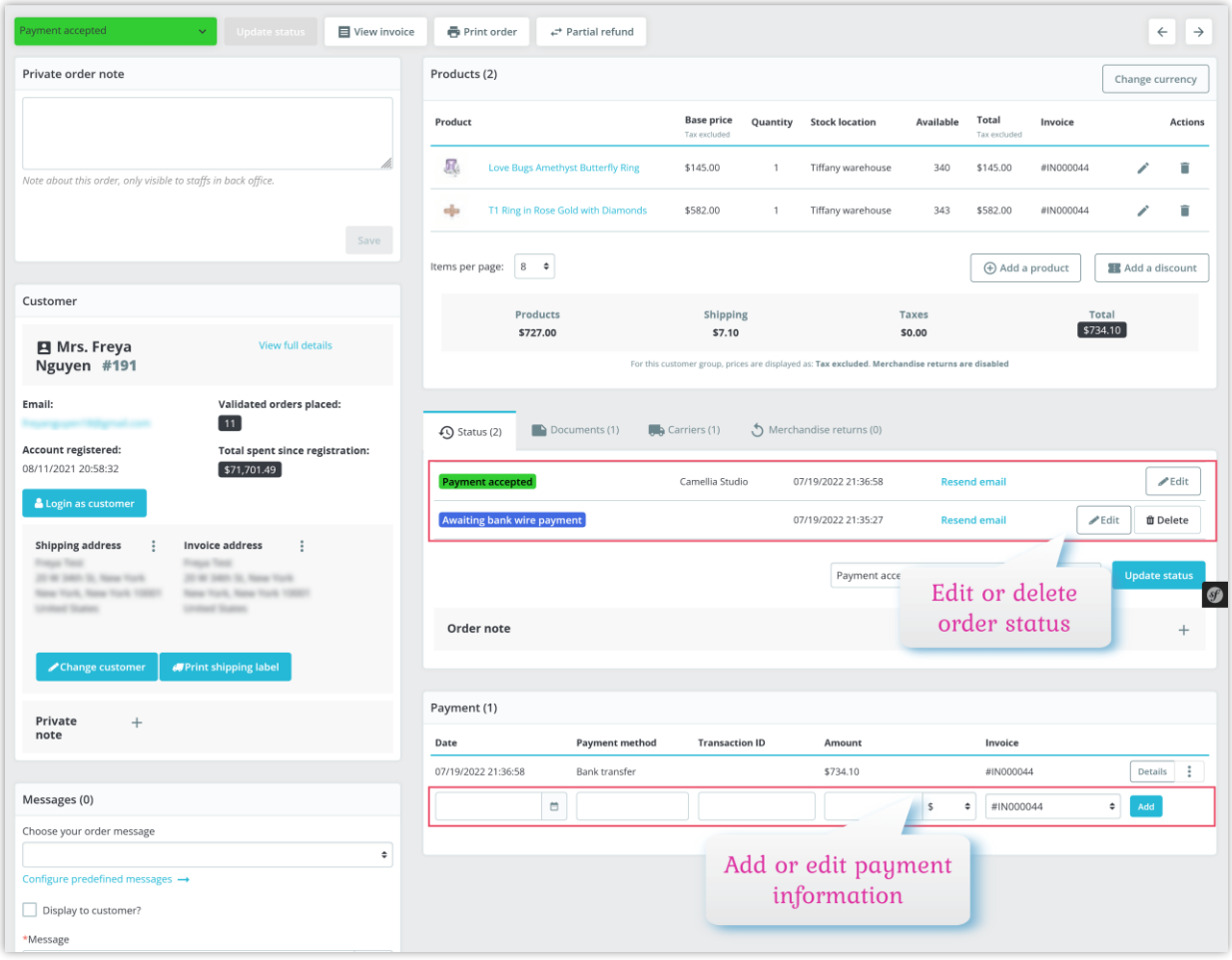


You can also edit any order detail data which is visible to you:

- Edit or delete order status
- Edit shipping information
- Add or edit payment information
- Add or edit order note
- Edit shipping address or invoice address
- Assign an order to another customer
- Send message to customer
- Add/edit/delete products
- Change currency


Order CVGSSCRNQ from Mark Test
Delete this order
Duplicate this order
Recommended Modules
Help
Delete or duplicate this order
Date 06/13/2019
Total $88.40
Messages 0
Edit order status
Add or edit order note
Edit shipping / invoice address
Edit shipping information
Assign an order to another customer
Add payment method
Send message to customer
Add/edit/delete products
Products: $76.40
Shipping: $7.00
Taxes: $0.00
Total: $88.40

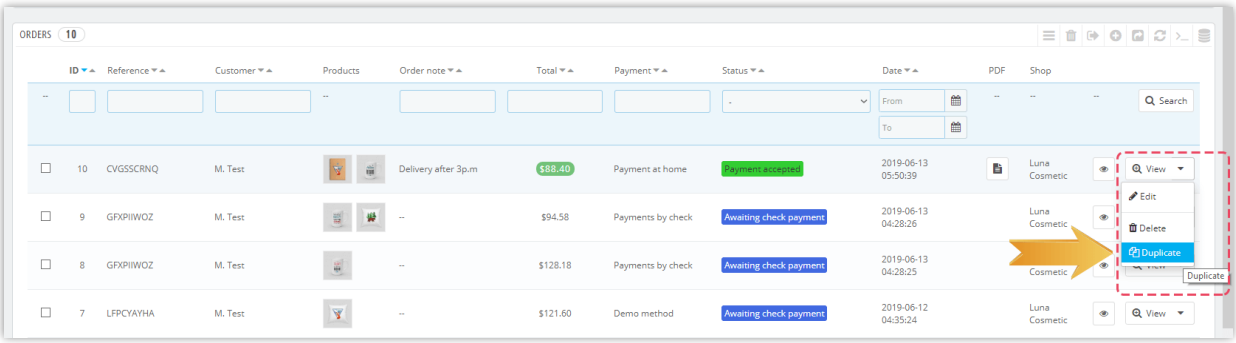

#44 YTSGXDNEC from Freya Nguyen
Change currency
CHANGE CURRENCY
Convert to *
Euro (EUR)
Convert price
Convert currency label only (keep value)
Convert by current exchange rate configured for your store
Convert by custom exchange rate
Exchange rate *
Cancel
Save
Products (2)
Payment accepted
Awaiting bank wire payment
Update status

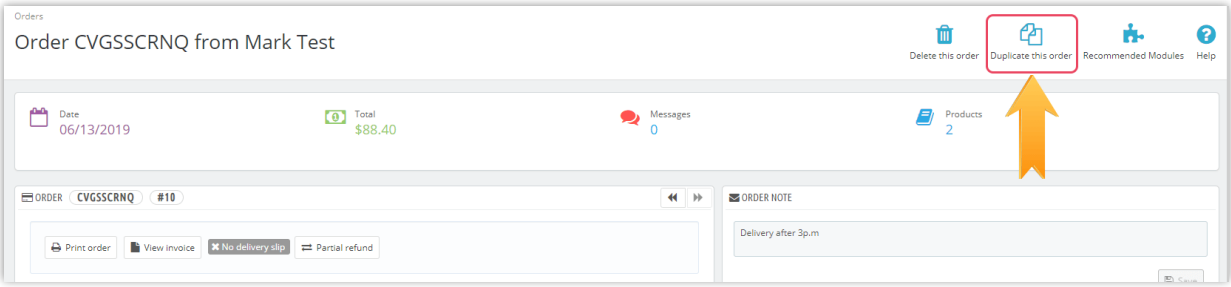

Private order note
Customer
Mrs. Freya Nguyen #191
Products (2)
Change currency
Love Bugs Amethyst Butterfly Ring
T1 Ring In Rose Gold with Diamonds
Add a product
Add a discount
Status (2)
Documents (1)
Carriers (1)
Merchandise returns (0)
Payment accepted
Awaiting bank wire payment
Edit or delete order status
Order note
Payment (1)
Add or edit payment information
Messages (0)

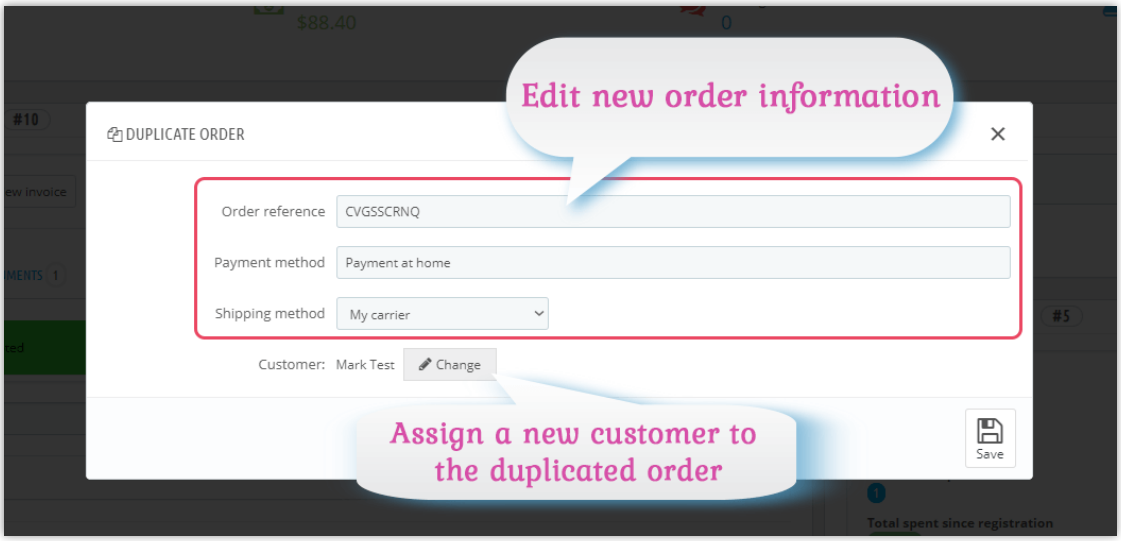
❖ *Duplicate an order*

This module also allows you to duplicate an order. When duplicate an order, you may modify *shipping method*, *customer shipping/invoice address* or even *assign a new customer to the order*.

To duplicate an order, on **orders listing page** click on arrow button to open drop-down menu > Click on “Duplicate” or click on “Duplicate this order” button from **order details page**.



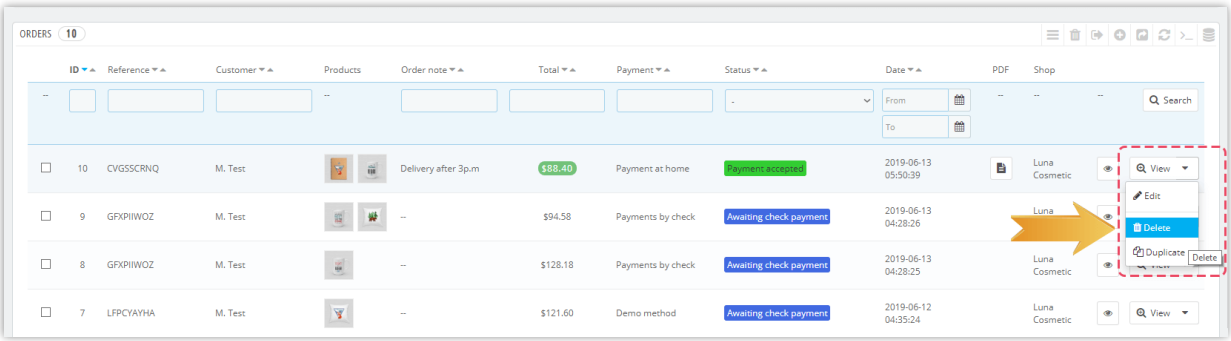


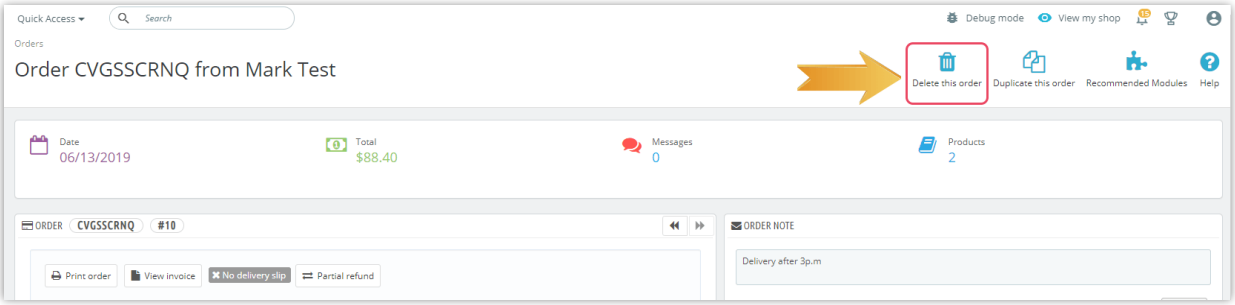


4. Delete and restore orders

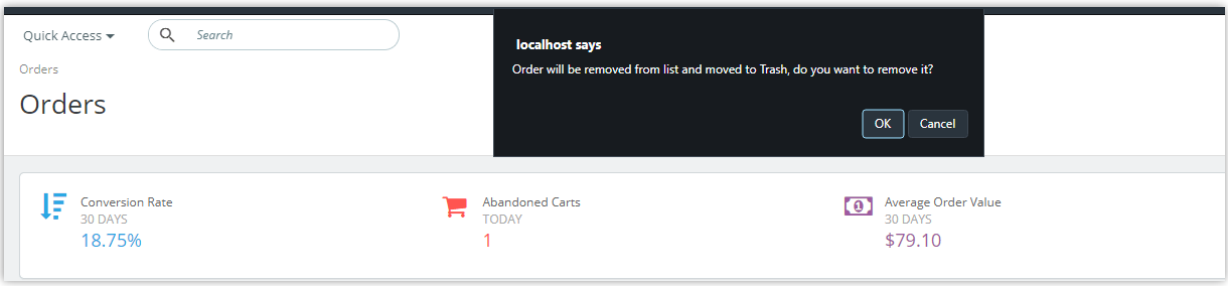
By default, you cannot delete a PrestaShop order, but **Order Manager** enables you to do that. You can move unnecessary orders or failed orders to a trash. From this trash, you can **delete orders permanently** or **restore orders** back to order listing page.

To delete an order, on **orders listing page** click on arrow button to open drop-down menu > Click on “Delete” or click on “Delete this order” button from **order details page**.

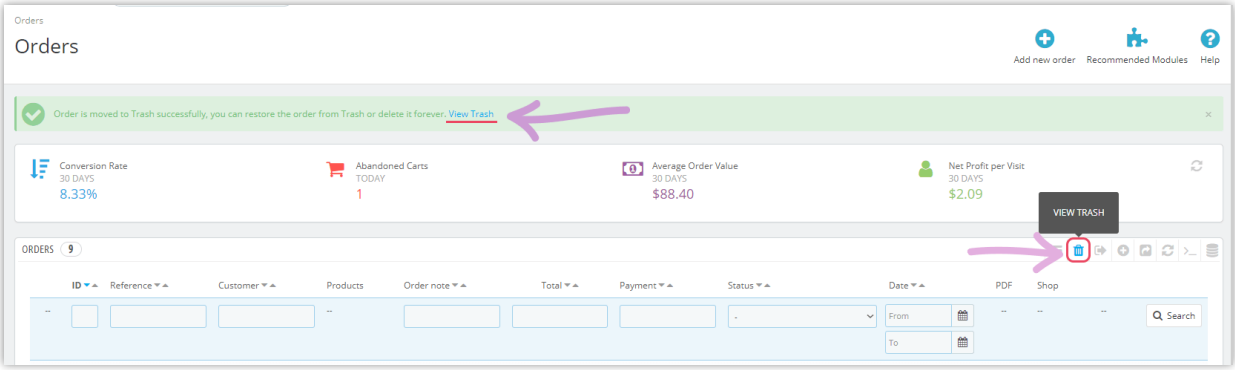


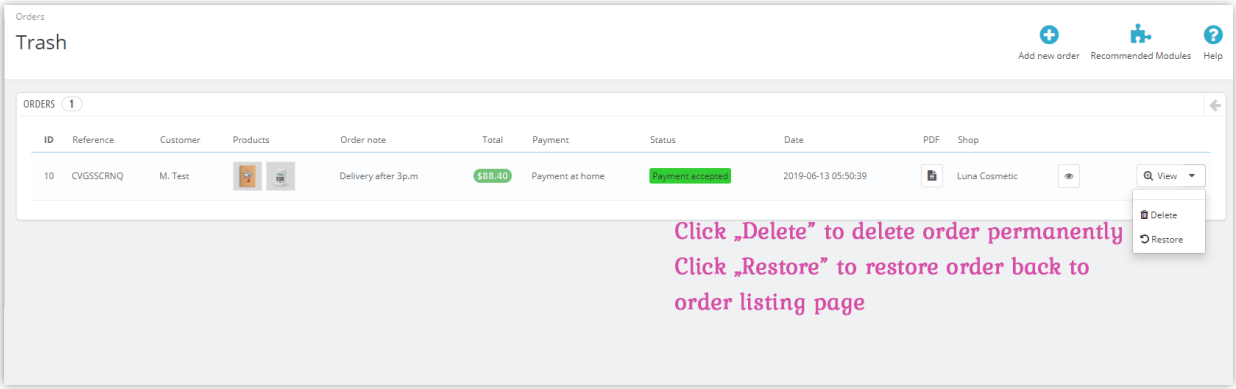


Click “Ok” button to move order to trash.



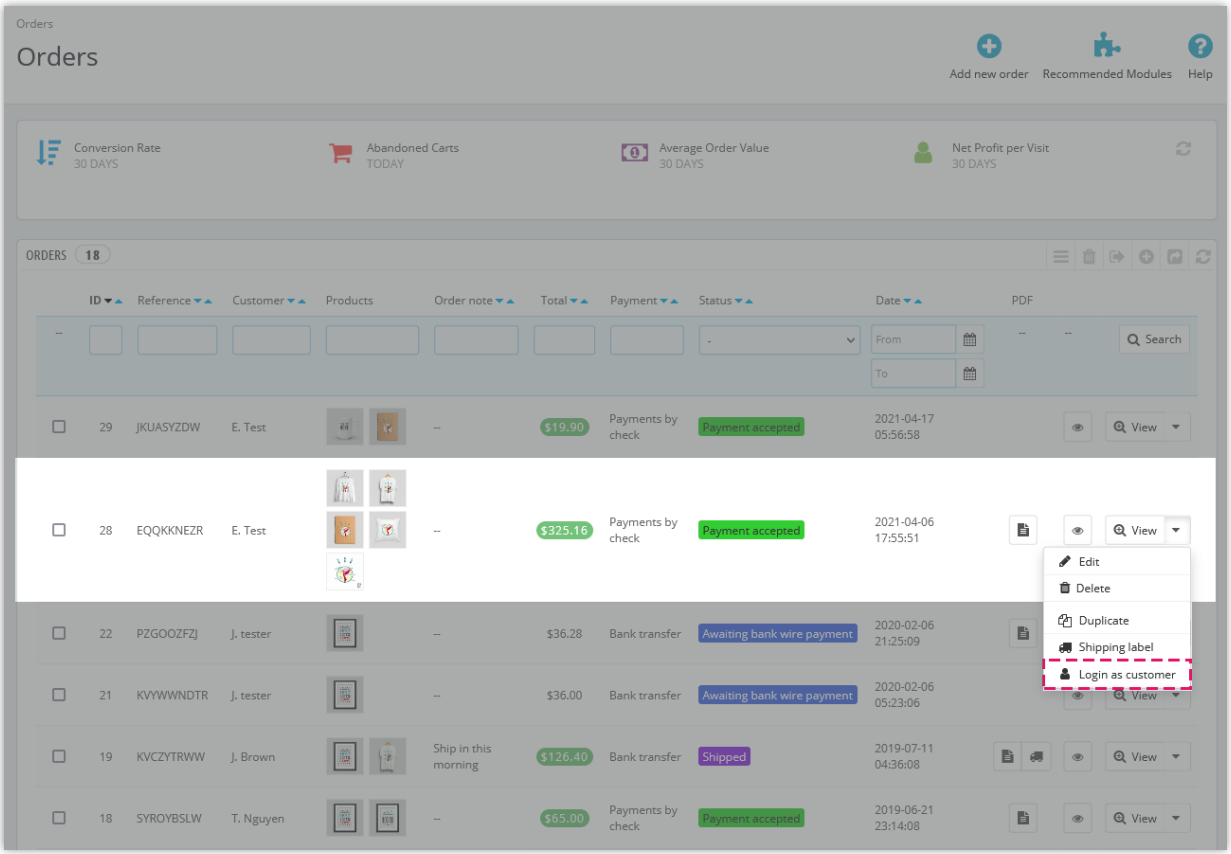
Click on “View trash” link or “View trash” icon to navigate to **Trash** page.



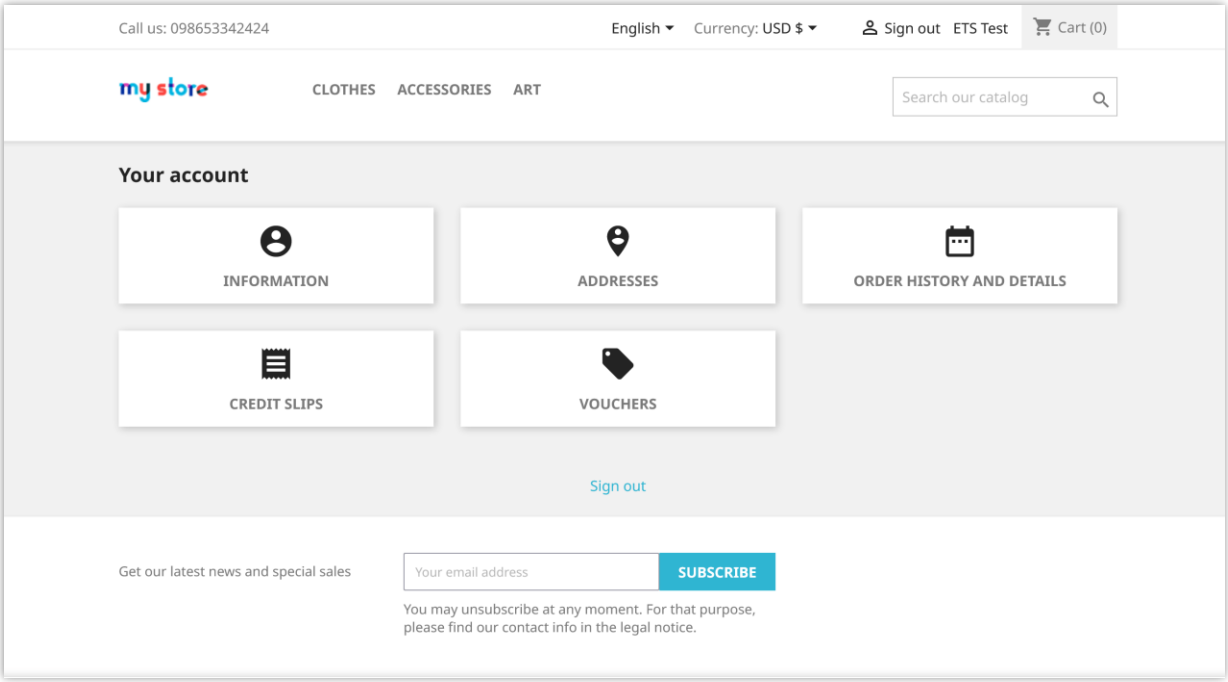


5. Log in as customer

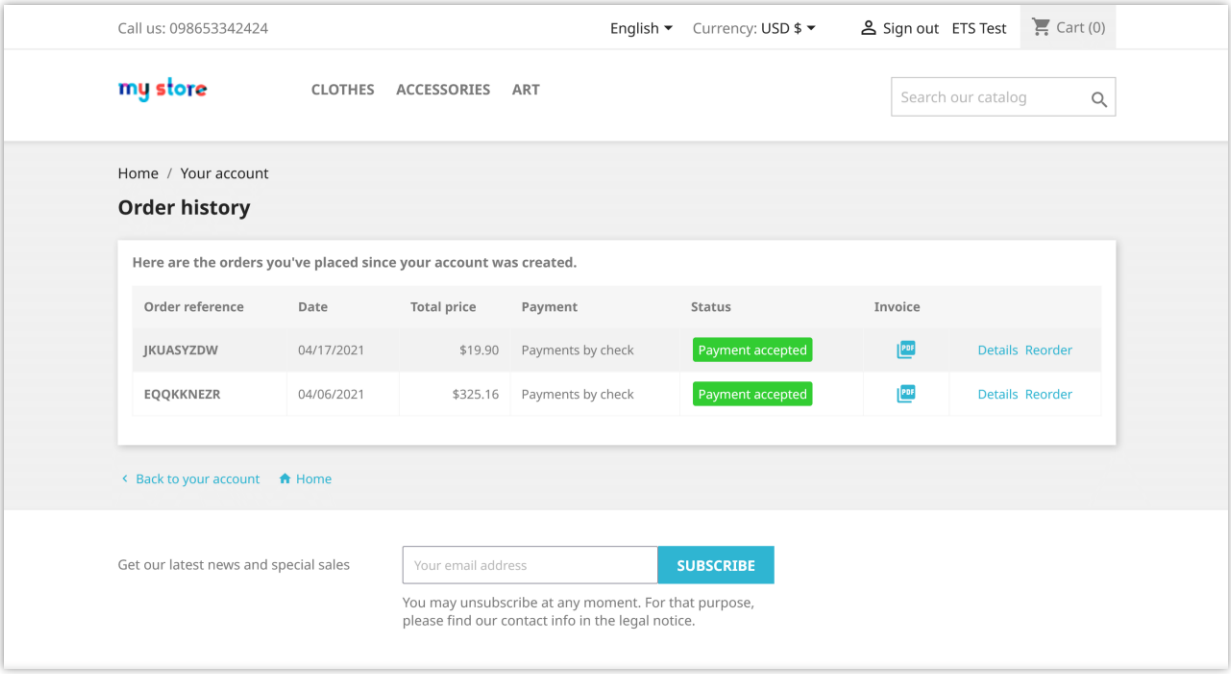
Order Manager enables a store manager to log in to the store's front office as a specific customer and views all order history, personal information, addresses, credit slips and vouchers of that customer.



Store manager will be navigated to "**Your account**" page of store's front office:



From here, store manager can view customer information, address, order history, etc.

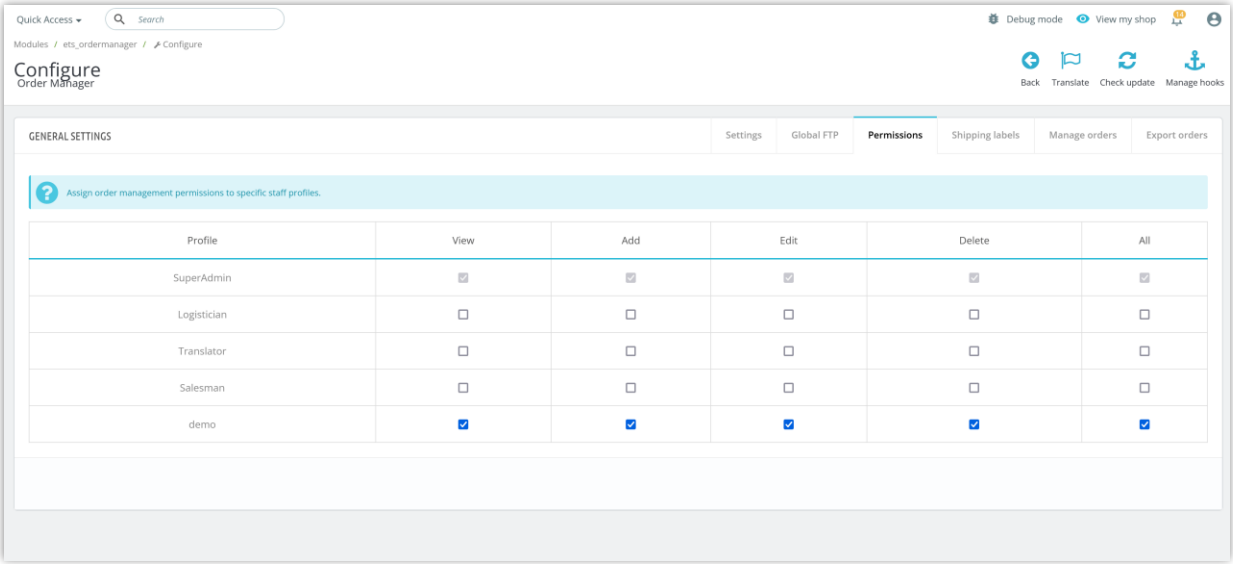


6. Assign order management permissions for staff profiles

Order Manager allows you to assign these following order management permissions for specific staff profiles: view orders, add orders, edit orders and delete orders.

To assign order management permissions to staff profiles, please navigate to **Order Manager** module's configuration page > Select "**Permissions**" tab.

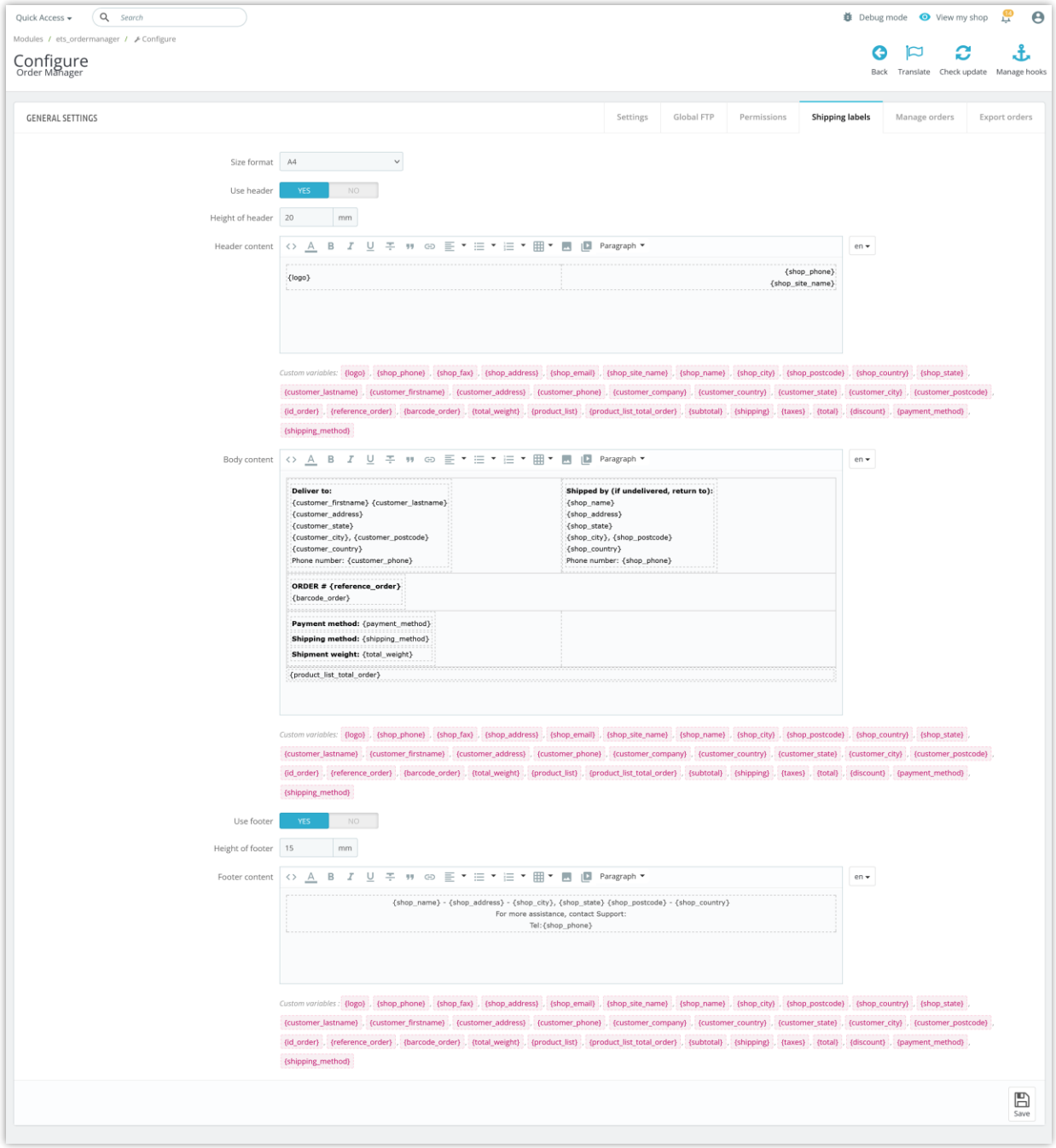
Check on the checkboxes to assign order management permissions to specific staff profile.



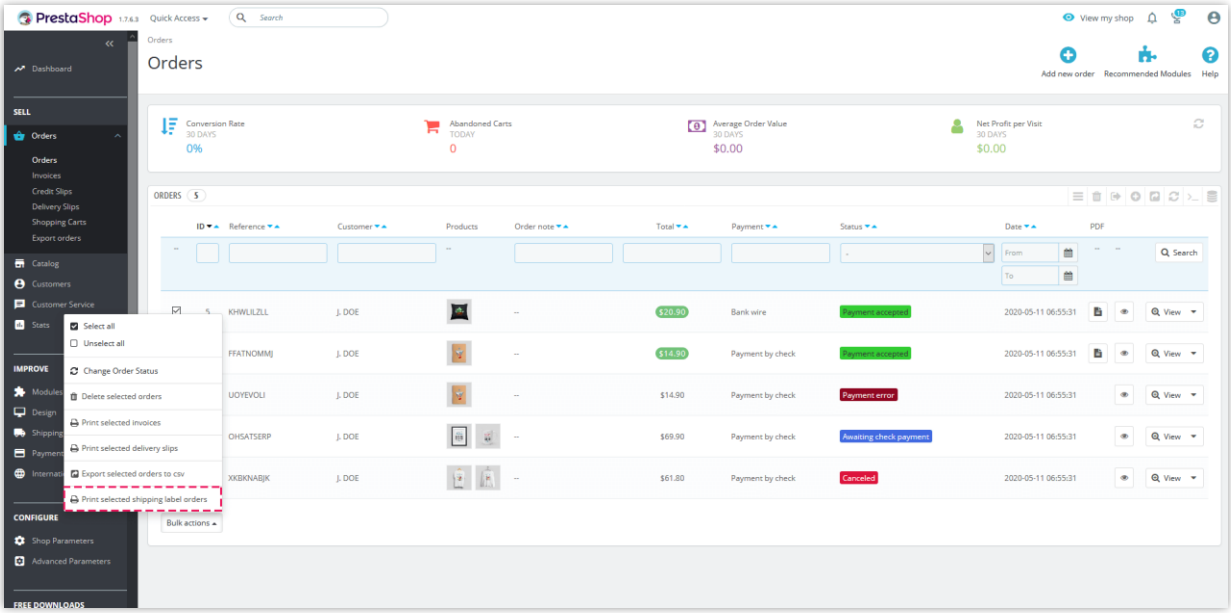
7. Customize shipping label

Order Manager also enables you to customize the shipping label template. Using the short codes, you can add necessary information about order details, customers, delivery address, etc. into the shipping label.

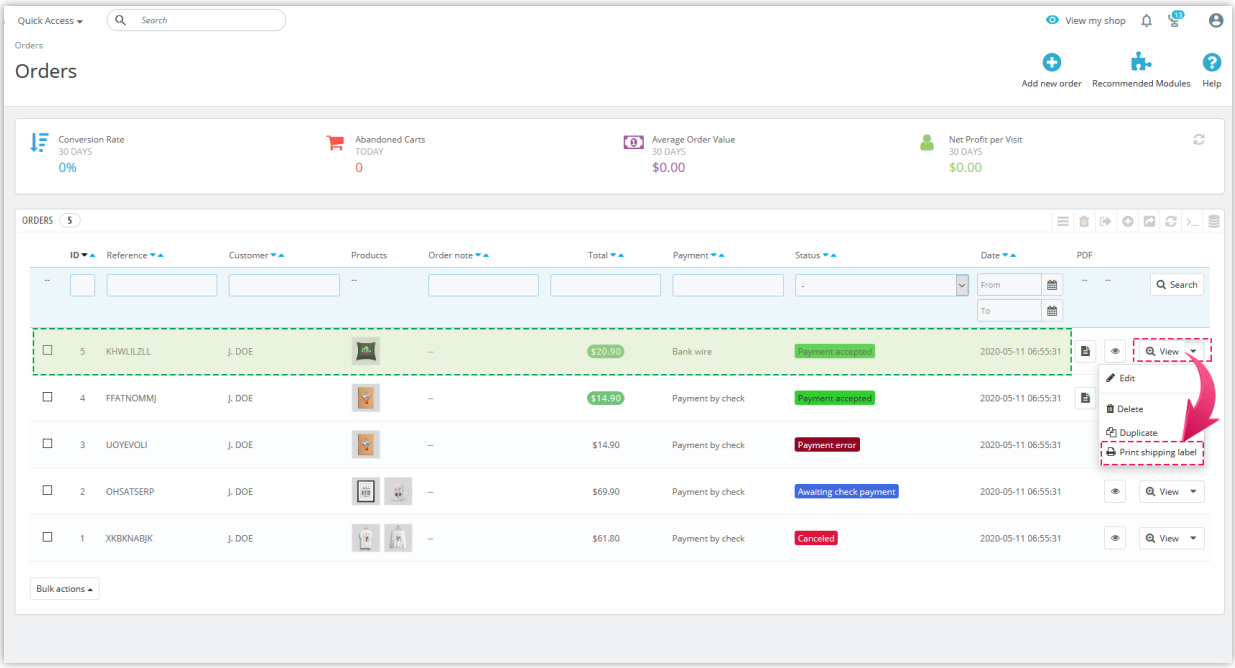
You can select the size format for shipping label. **Order Manager** supports these following sizes: A3, A4, A5, A6.



To print shipping label, navigate to order listing page and select the order(s) you want to print shipping label. Click on "*Bulk actions*" button > select "*Print selected shipping label orders*" option.



You can also print shipping label for a separate order:

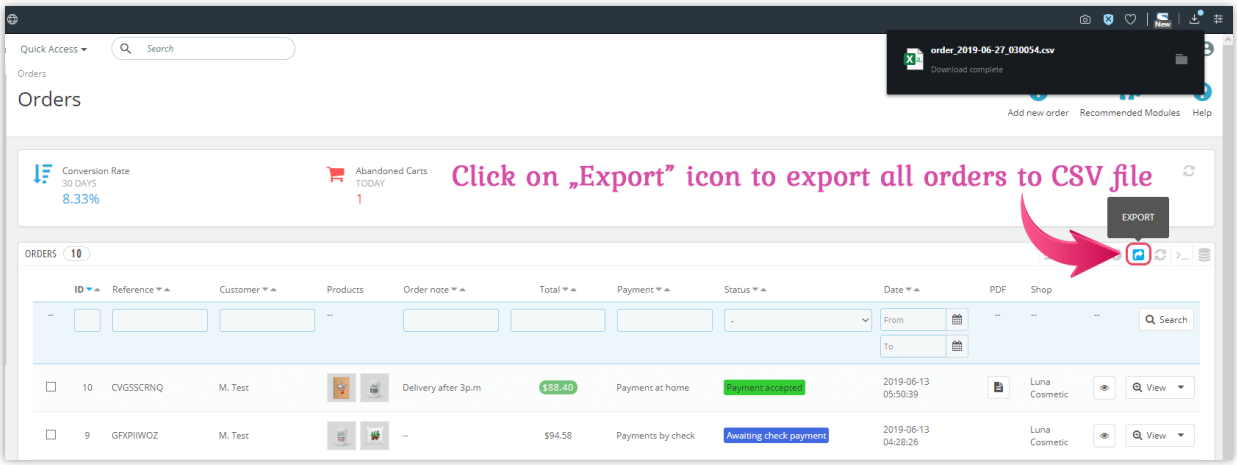


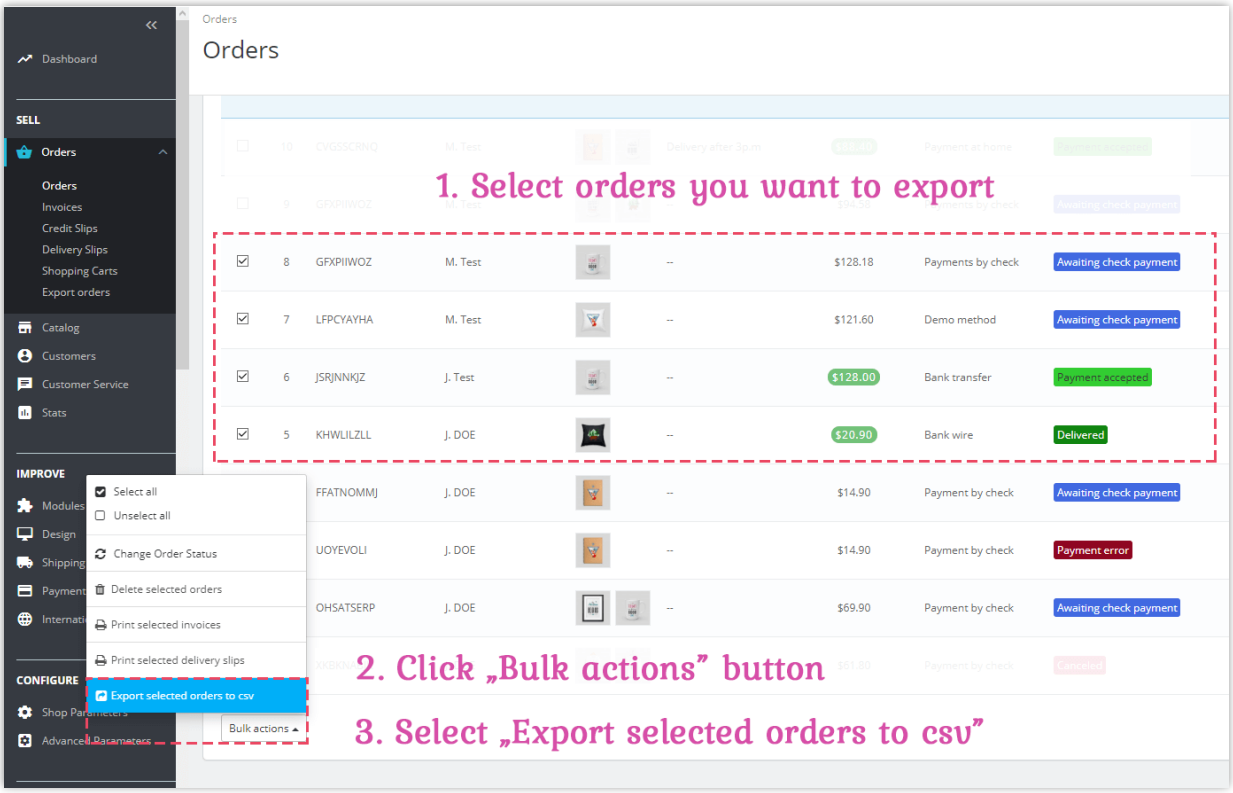
V. EXPORT PRESTASHOP ORDERS

The default order export feature of PrestaShop is very restricted and couldn't satisfy your increasing requirement. With a customizable export tool like **Order Manager,** you can easily **export your order data to CSV, Excel or XML** for accounting work, data transfer or other purposes.

1. Export orders to CSV file from orders listing page

Order Manager offers you an option to **export all orders** or **export selected orders** to CSV file on orders listing page.

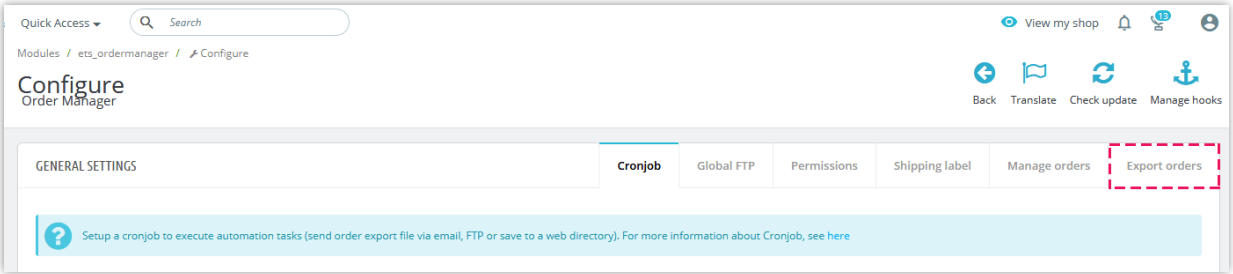




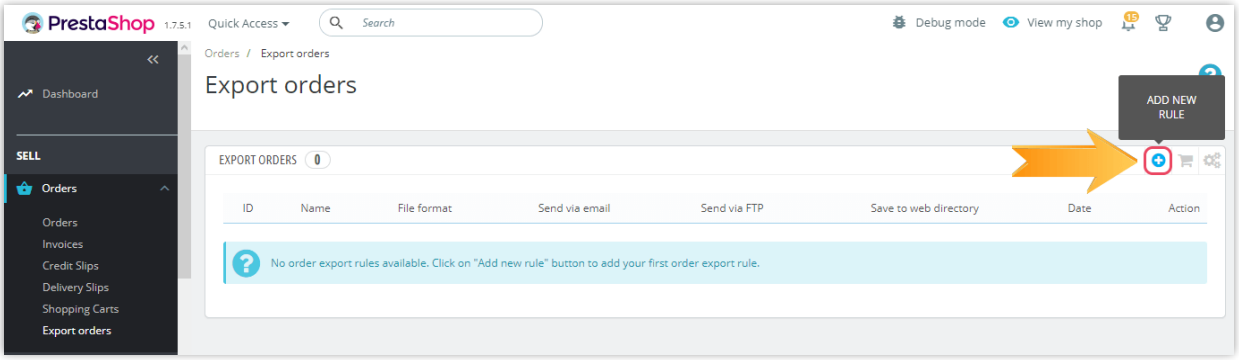
2. Create new export rule

Our PrestaShop export order module also allows you to **create different export rules** like *"This month orders", "Awaiting orders", "Paid orders", "Orders of a specific customer"*, etc. to easily export any order which satisfies your requirements.

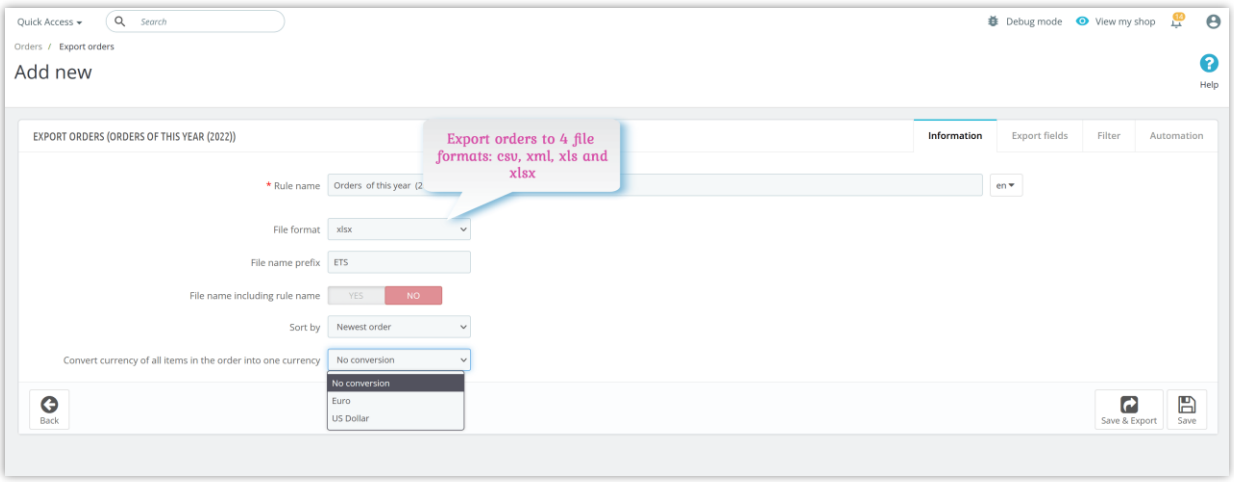
To create a new export rule, from module's configuration page, select "**Export orders**" tab.



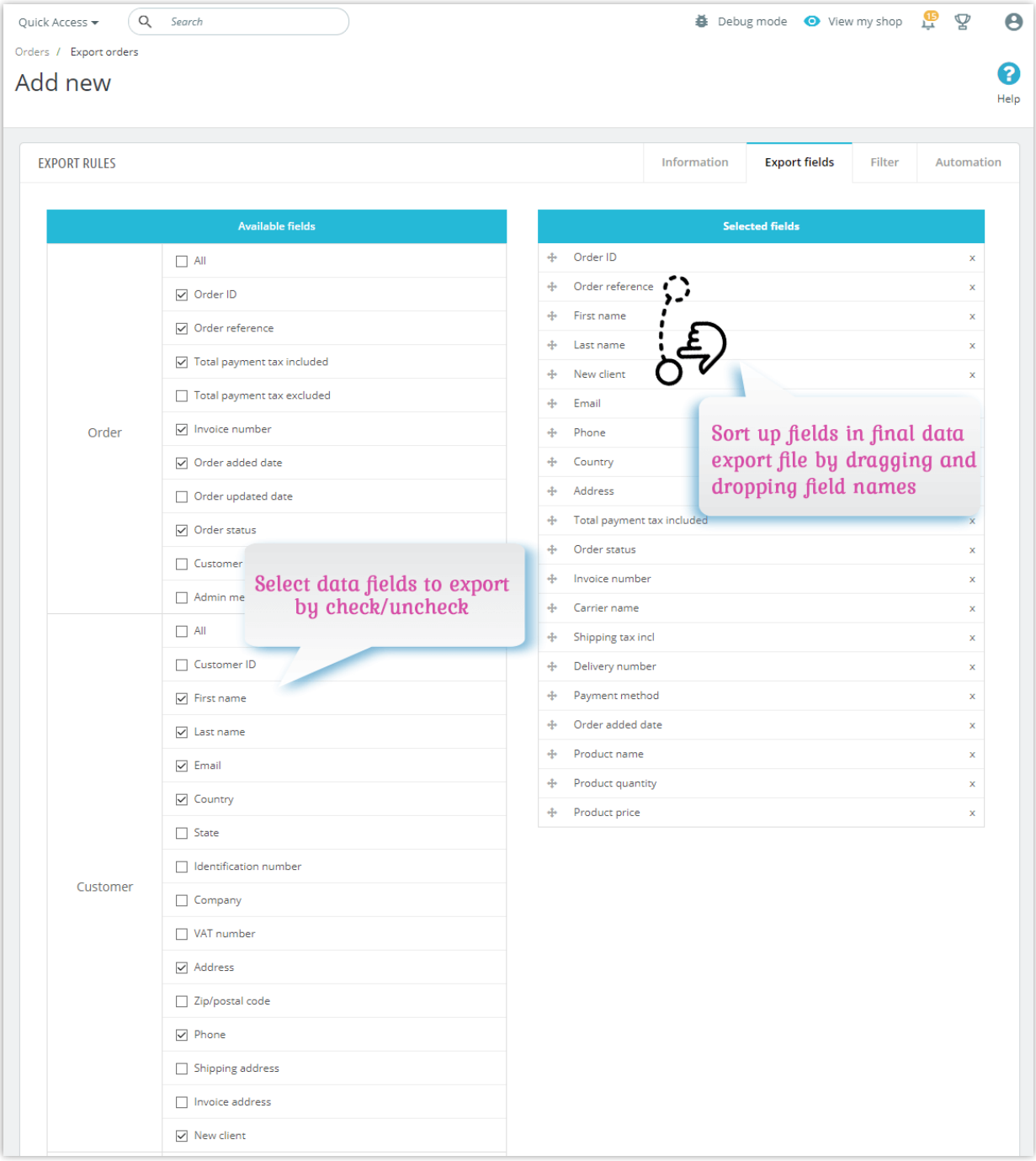
On "**Export orders**" page, click on "**Add new rule**" icon.



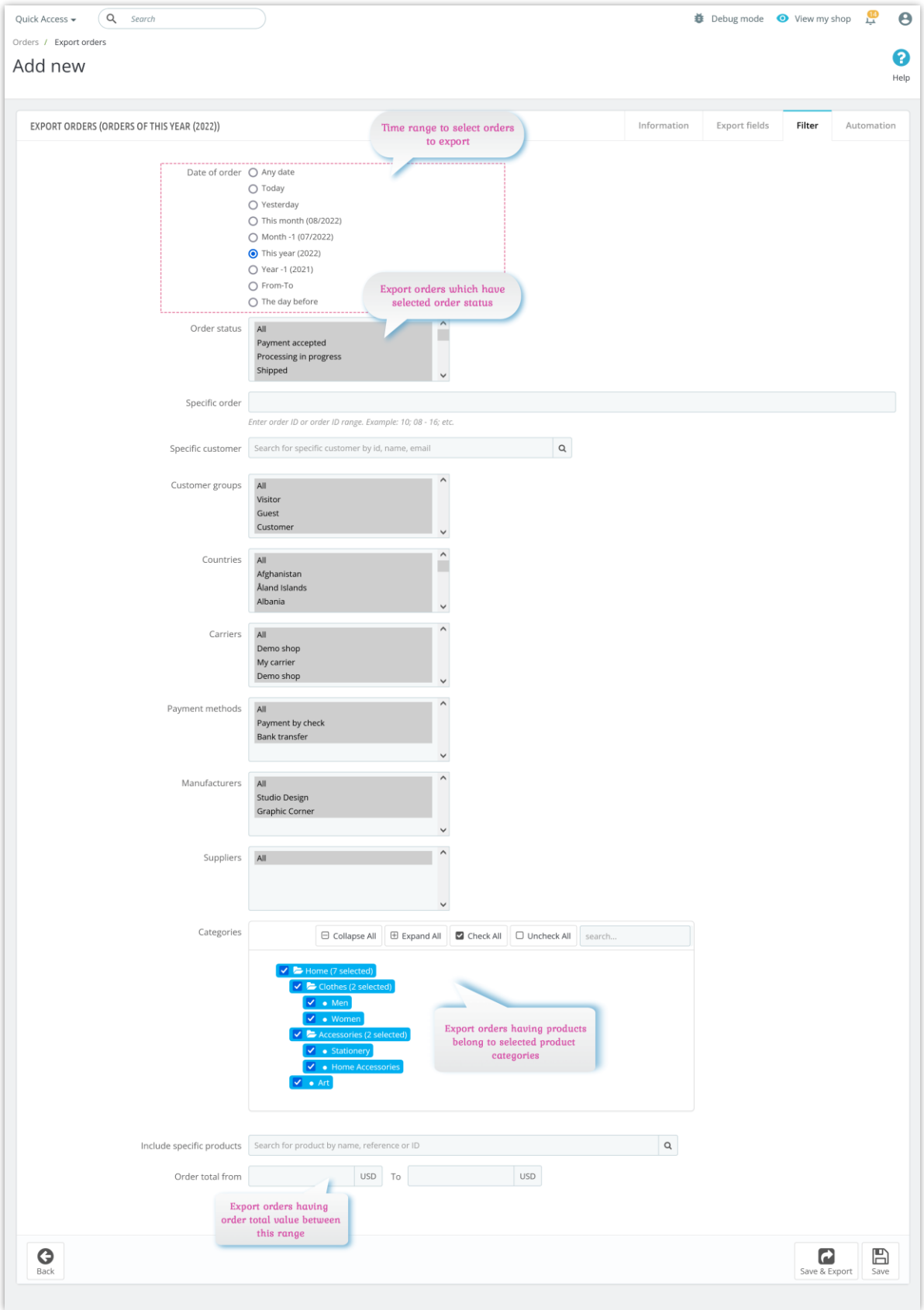
Fill in the fields on "**Information**" tab:



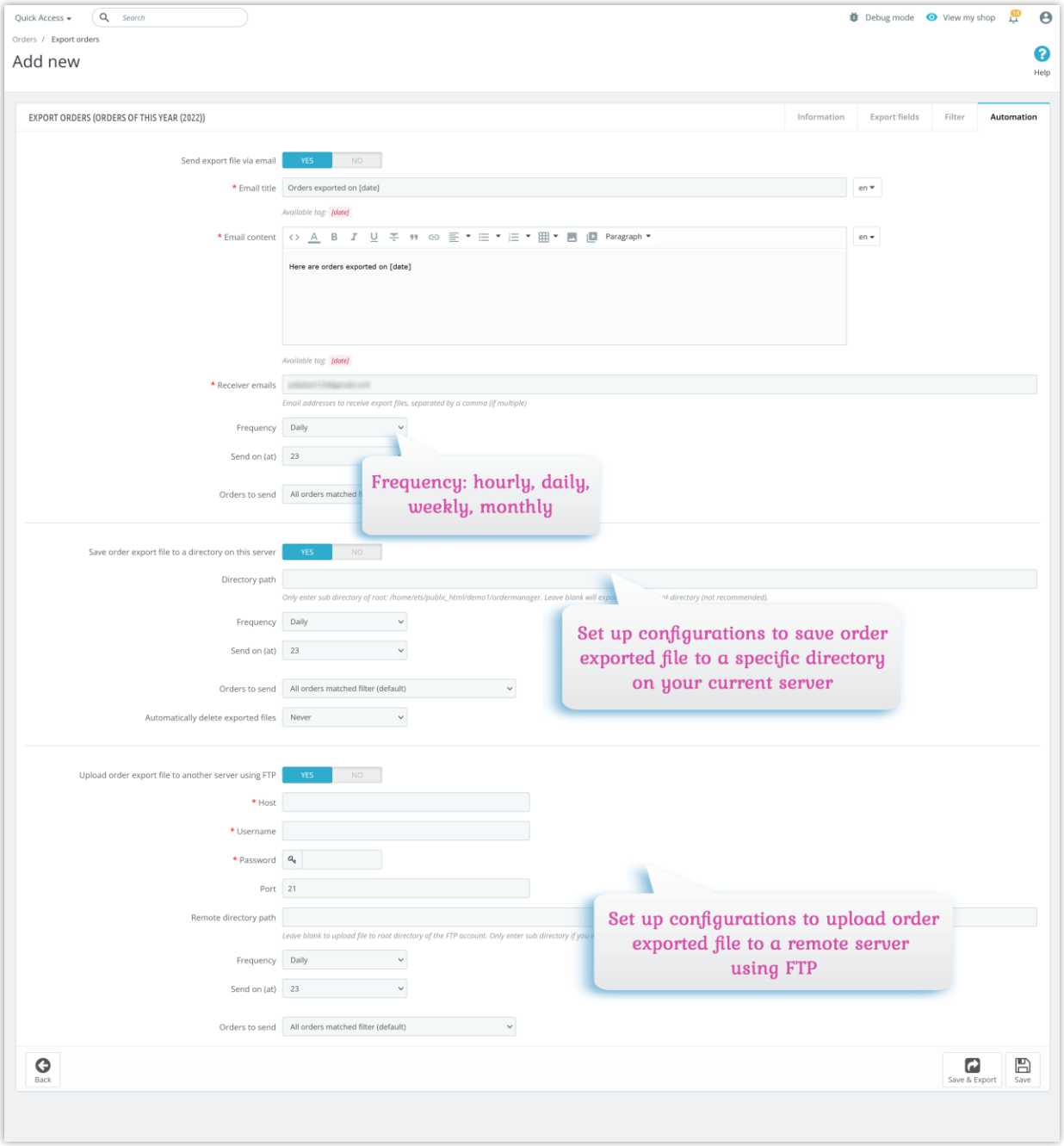
Navigate to "**Export fields**" tab > select export fields which are necessary to you and sort up fields in your final data export file just by dragging and dropping field names:



Navigate to "**Filter**" tab > select export conditions to apply this rule:


Quick Access
Search
Debug mode
View my shop
Orders / Export orders
Add new
Help
EXPORT ORDERS (ORDERS OF THIS YEAR (2022))
Information
Export fields
Filter
Automation
Time range to select orders to export
Date of order
Any date
Today
Yesterday
This month (08/2022)
Month -1 (07/2022)
This year (2022)
Year -1 (2021)
From-To
The day before
Export orders which have selected order status
Order status
All
Payment accepted
Processing in progress
Shipped
Specific order
Enter order ID or order ID range. Example: 10; 08 - 16; etc.
Specific customer
Search for specific customer by id, name, email
Customer groups
All
Visitor
Guest
Customer
Countries
All
Afghanistan
Åland Islands
Albania
Carriers
All
Demo shop
My carrier
Demo shop
Payment methods
All
Payment by check
Bank transfer
Manufacturers
All
Studio Design
Graphic Corner
Suppliers
All
Categories
Collapse All
Expand All
Check All
Uncheck All
search...
Home (7 selected)
Clothes (2 selected)
Men
Women
Accessories (2 selected)
Stationery
Home Accessories
Art
Export orders having products belong to selected product categories
Include specific products
Search for product by name, reference or ID
Order total from
USD
To
USD
Export orders having order total value between this range
Back
Save & Export
Save

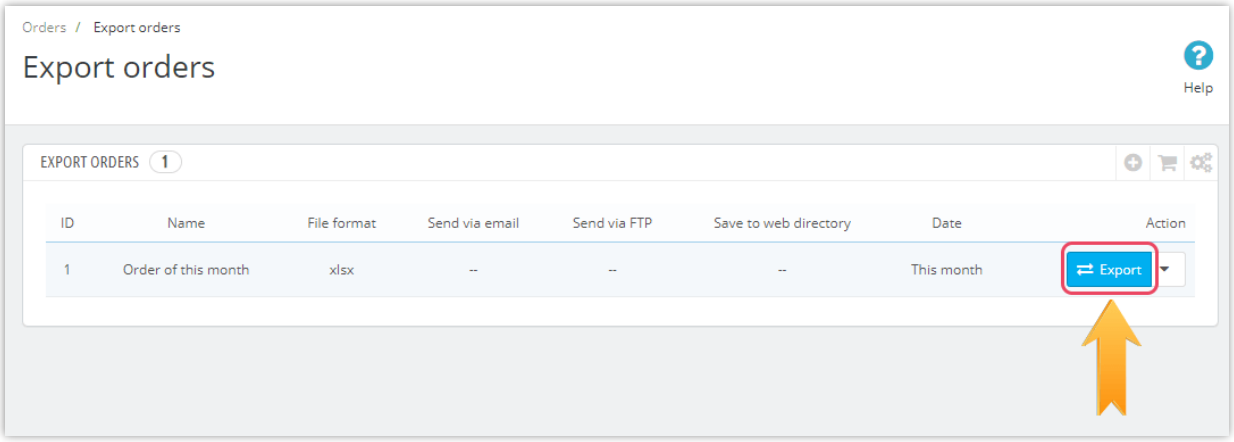
Navigate to “**Automation**” tab to set up configuration for **auto exporting orders using cronjob**.



Click “**Save**” button to save your export rule.

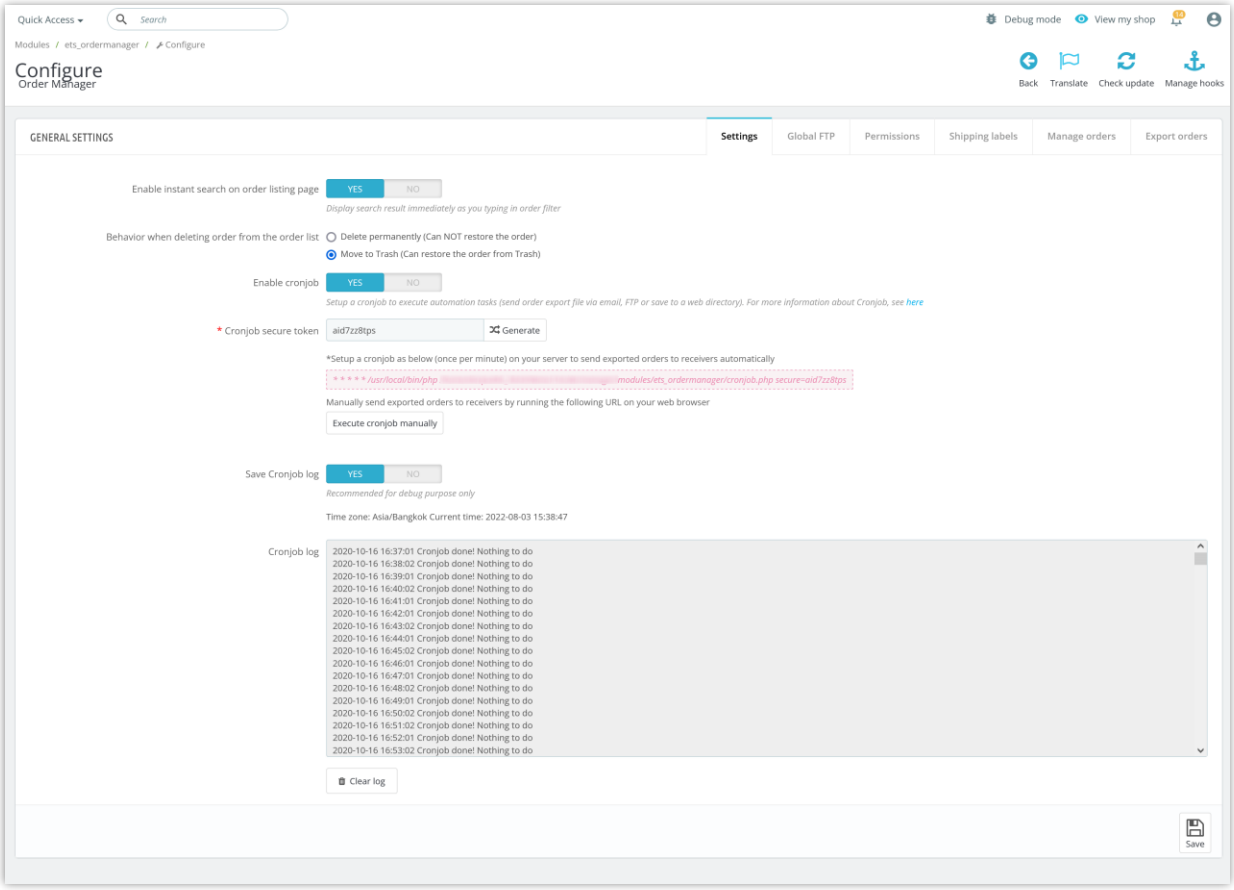
NOTE: *You need to enable cronjob feature to make automation task work.*

After adding an export rule, from "**Export orders**" page, you can click on "Export" button to immediately export orders.



3. Settings

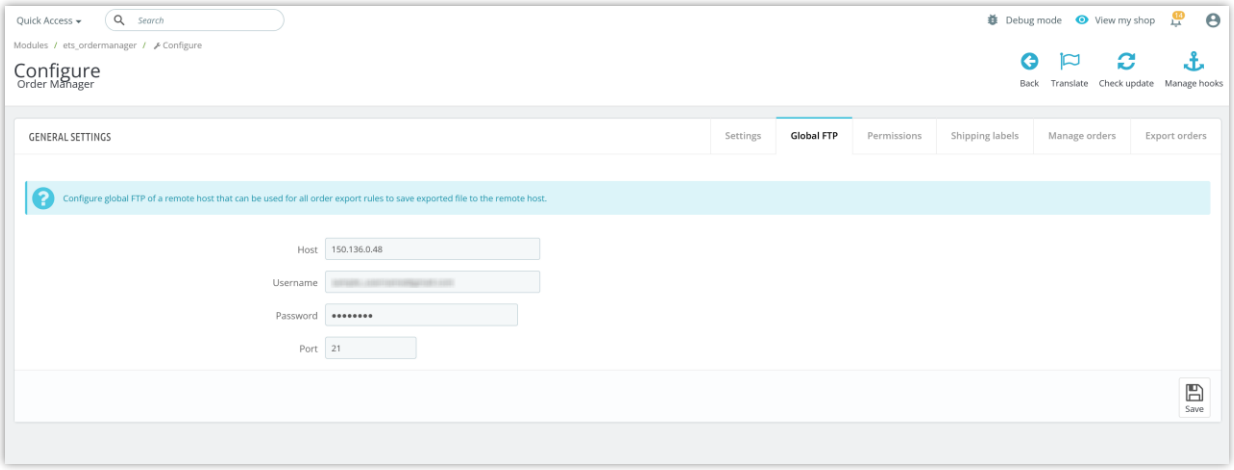
To allow **Order Manager** to execute automation tasks (send order export file via email, FTP or save to a web directory), you need to enable cronjob feature. To set up cronjob, open module's configuration page > select "**Settings**" tab.



Click “Save” to apply cronjob configuration.

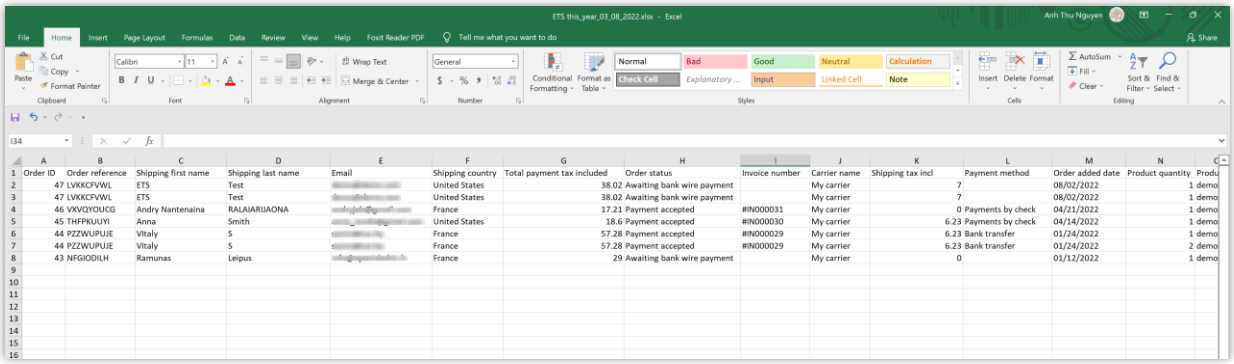
4. Set up global FTP

To allow **Order Manager** to send order export file to a remote host, you need to set up FTP information. From module’s configuration page, navigate to “**Global FTP**” tab > enter your FTP information then click “Save” to finish.



5. Export result

Below is an example of export file in XLSX format:



Order ID	Order reference	Shipping first name	Shipping last name	Email	Shipping country	Total payment tax included	Order status	Invoice number	Carrier name	Shipping tax incl	Payment method	Order added date	Product quantity	Produ
47	LVKKCFVWL	ETS	Test	[redacted]	United States	38.02	Awaiting bank wire payment		My carrier	7		08/02/2022	1	demo
47	LVKKCFVWL	ETS	Test	[redacted]	United States	38.02	Awaiting bank wire payment		My carrier	7		08/02/2022	1	demo
46	VXVQYOUCG	Andry Nantenaina	RALAIARIJAONA	[redacted]	France	17.21	Payment accepted	#IN000031	My carrier	0	Payments by check	04/21/2022	1	demo
45	THFPKUUYI	Anna	Smith	[redacted]	United States	18.6	Payment accepted	#IN000030	My carrier	6.23	Payments by check	04/14/2022	1	demo
44	PZZWUPUJE	Vitaly	S	[redacted]	France	57.28	Payment accepted	#IN000029	My carrier	6.23	Bank transfer	01/24/2022	1	demo
44	PZZWUPUJE	Vitaly	S	[redacted]	France	57.28	Payment accepted	#IN000029	My carrier	6.23	Bank transfer	01/24/2022	2	demo
43	NFGIODILH	Ramunas	Leipus	[redacted]	France	29	Awaiting bank wire payment		My carrier	0		01/12/2022	1	demo

VI. THANK YOU

Thank you again for purchasing our product and going through this documentation. We hope this document is helpful and efficient in the installation and usage of **Order Manager** module. If you do have any questions for which the answer is not available in this document, please feel free to contact us.