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

Contents

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 beyond this documentation's scope, please feel free to contact us.

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 sales, it's quite difficult if you want to **edit an order or delete PrestaShop orders** as per customer's demand. In addition, the default order export feature of PrestaShop is very restricted and couldn't satisfy your increasing requirements.

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 on the PrestaShop e-commerce platform. **Order Manager** is an **all-in-one** PrestaShop order management tool that allows you 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",** and 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 orders, 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.
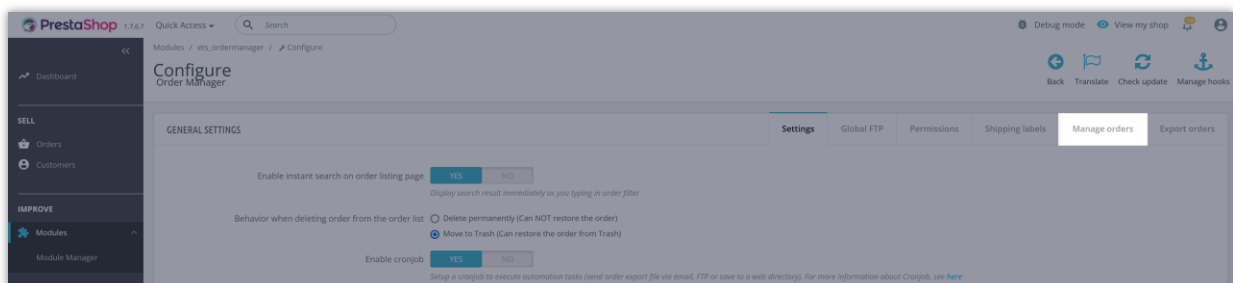
1. Customize orders listing page

From the "**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**" option to open the popup. You can select which fields to display and arrange them by dragging and dropping the field names.
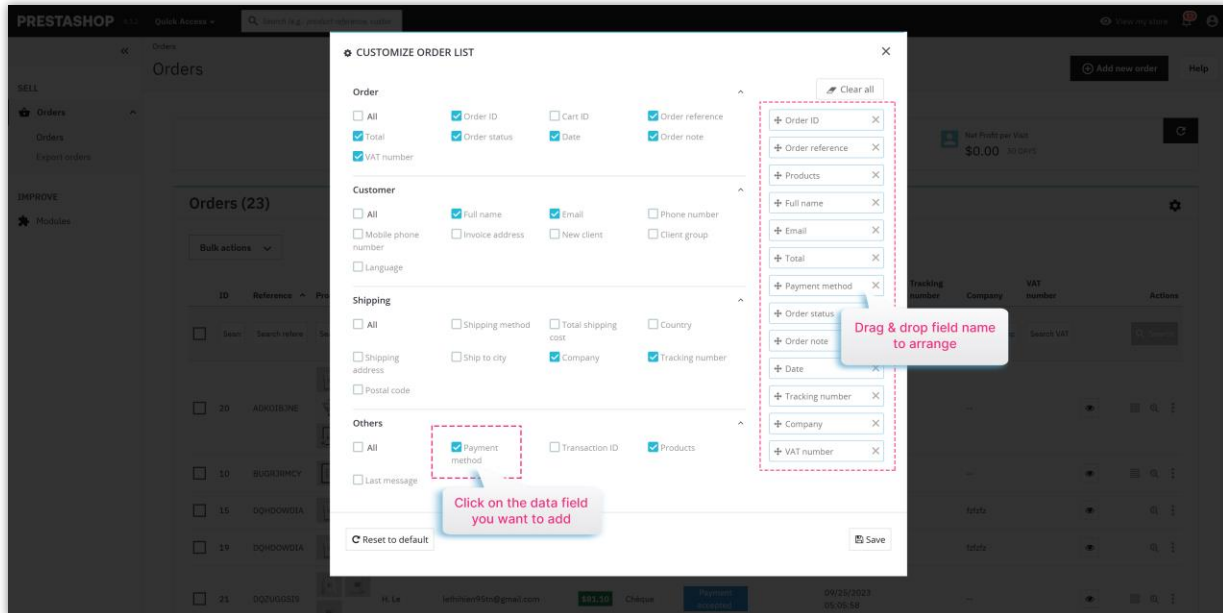
In addition, **Order Manager** also supports the following bulk actions for selected orders on the order list:

- Change order status
- Print selected invoices/delivery slips
- Export orders to CSV file
- Delete orders
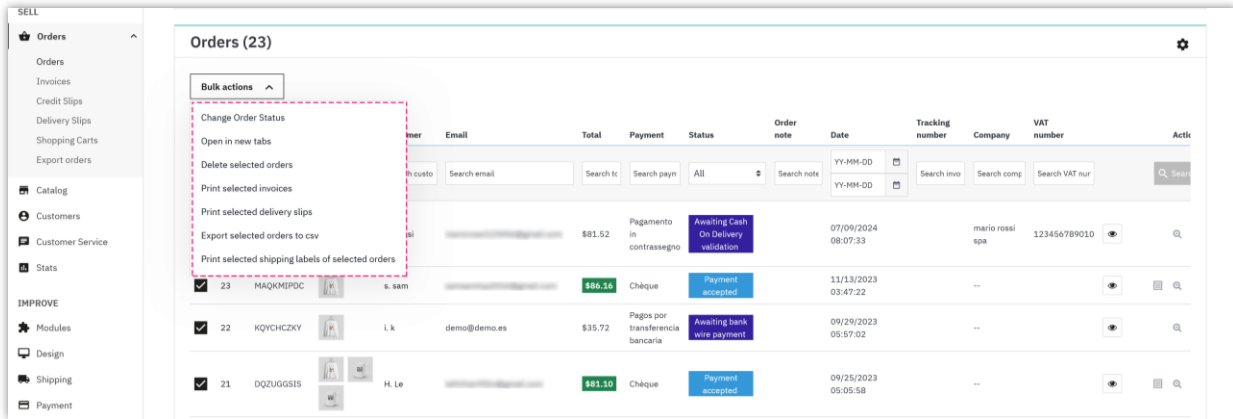
2. Convenient order quick view popup

Order Manager provides a quick view popup to help you view order details without opening a separate order page.
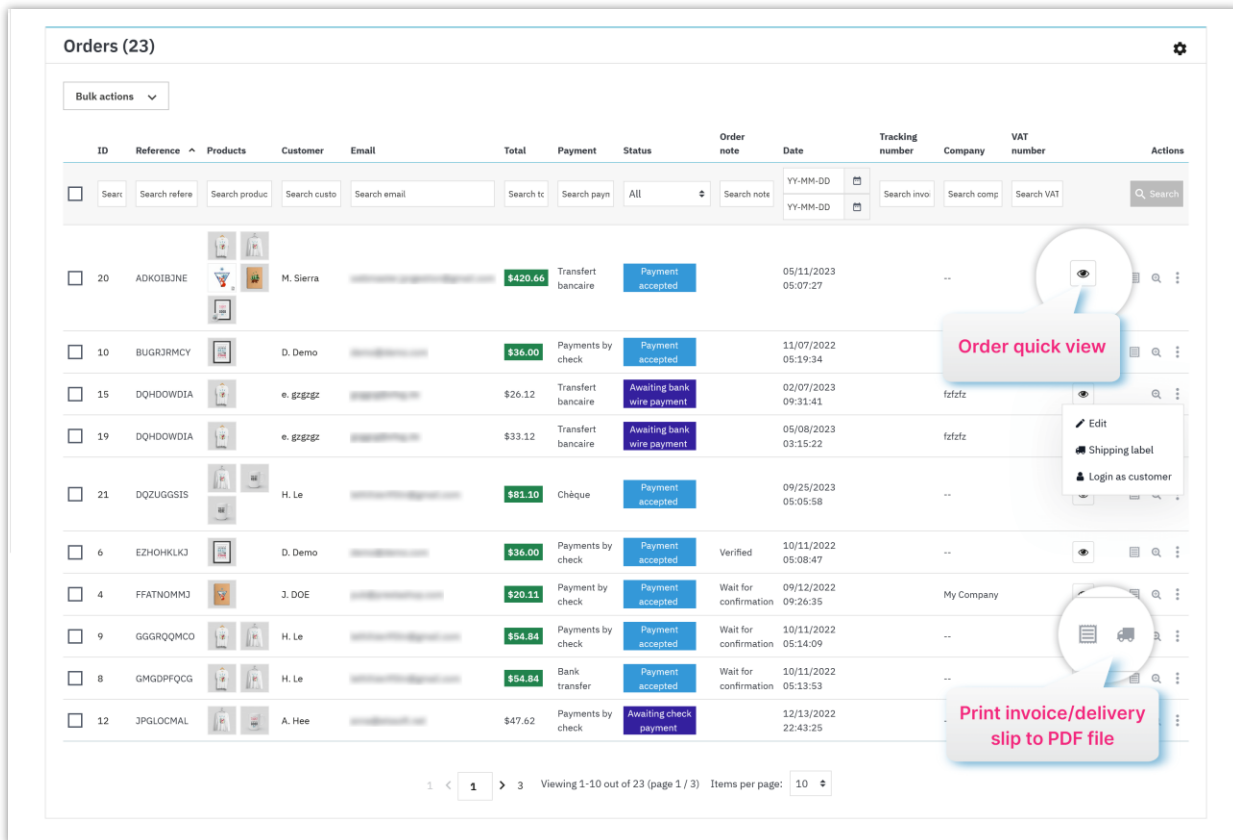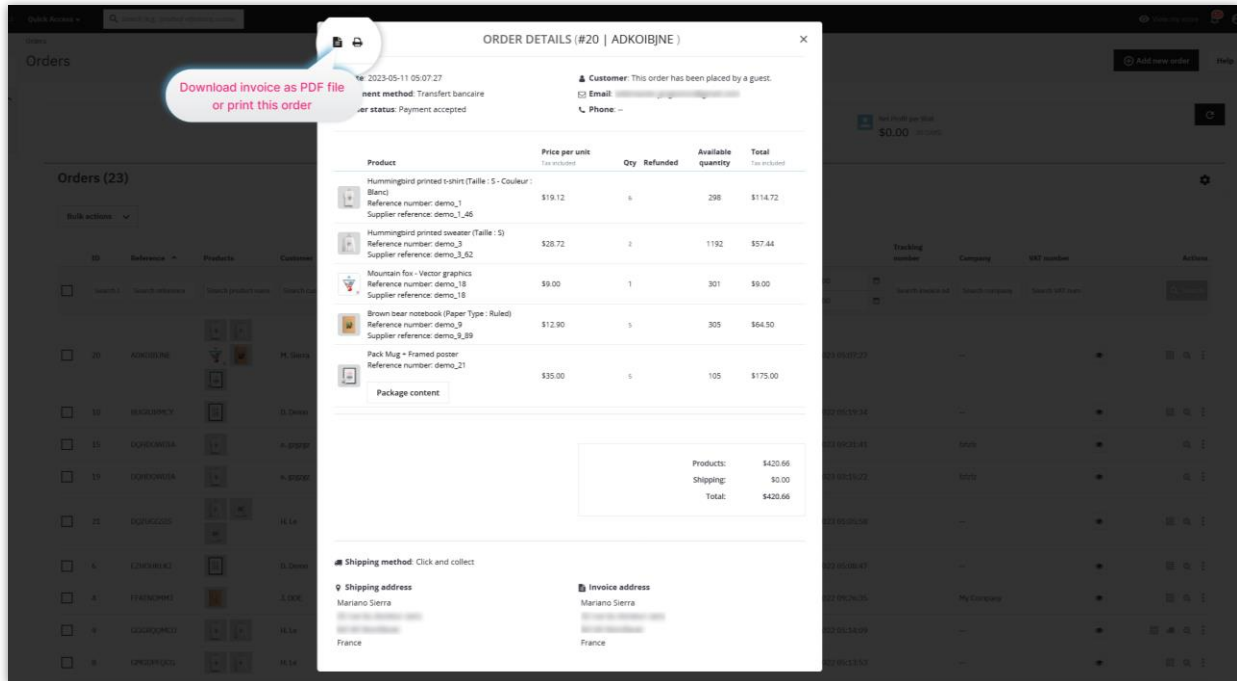
3. Edit an existing order and duplicate the order

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

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

❖ *Edit order data on the order listing page*

On the order listing page, select an order you want to edit and open the drop-down menu > Select "**Edit**".

You can edit any order data visible to you > Click "**Update**" button to finish.

❖ *Edit order data on the order details page*

On order listing page, select an order you want to edit then click on "**View**" icon to open the order details page.

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

❖ *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 the **order listing page** select an order you want to duplicate then open the drop-down menu > Click on "**Duplicate**" or click on the "**Duplicate this order**" button from the **order details page**.
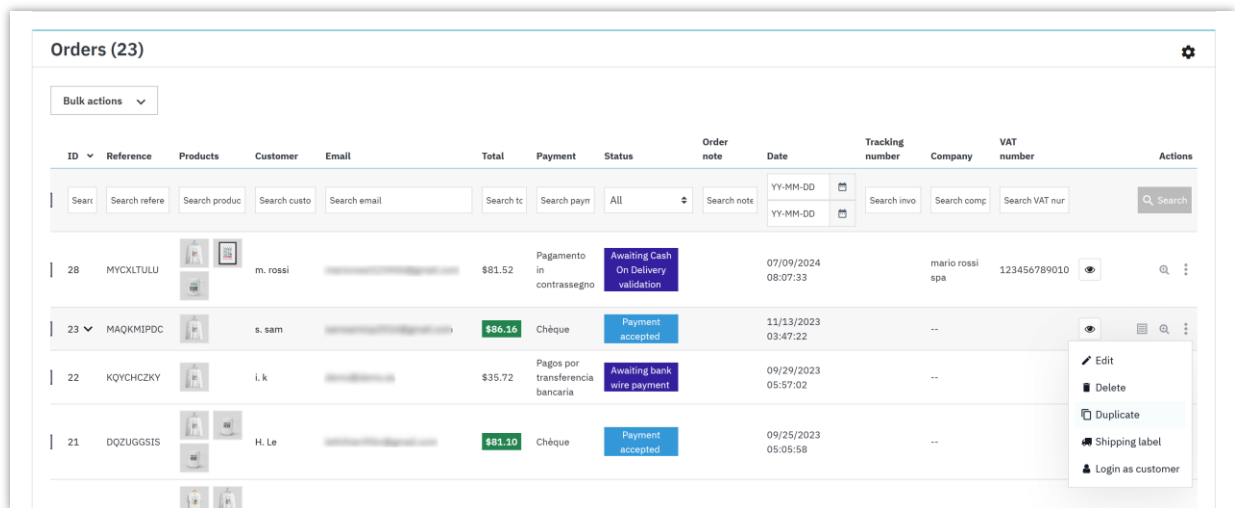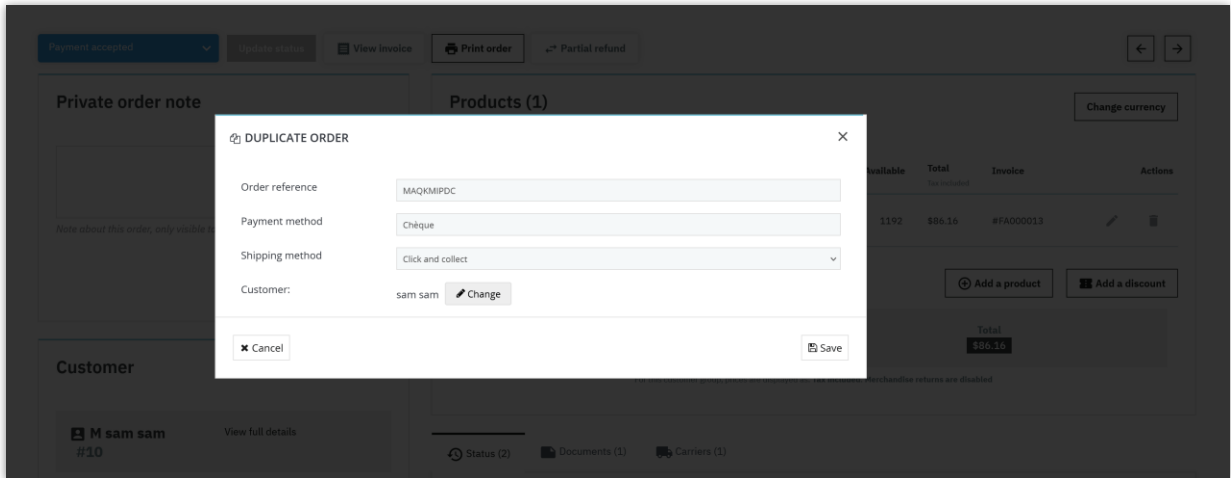
Click on the "**Change**" button to search and select the customer you want to assign the duplicated order.
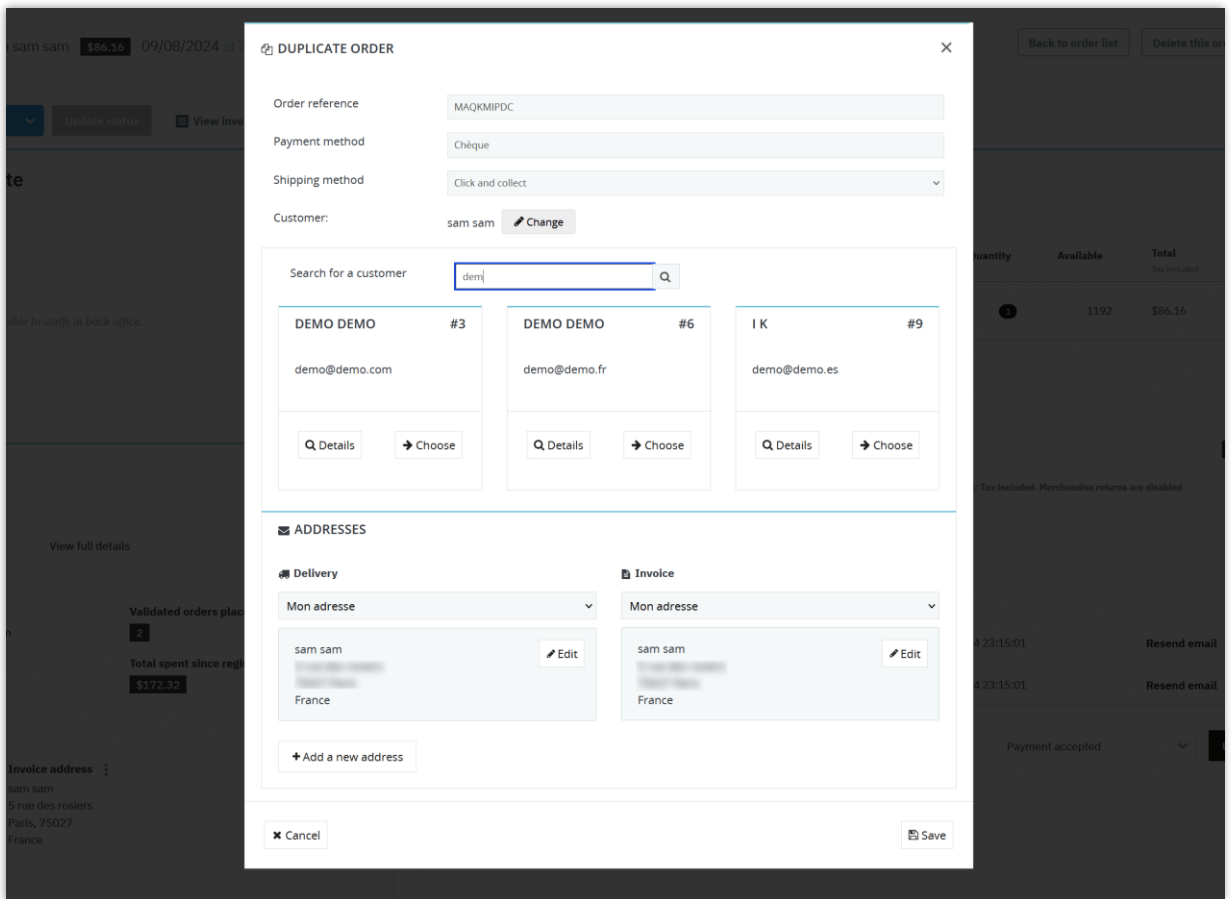
Save your changes to finish.

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** to the order listing page.

To delete an order, on the **order listing page** select the order you want to delete, then open the drop-down menu > Click on "**Delete**" option or click on "**Delete this order**" button from **order details page**.

Click "Ok" button to move order to trash.
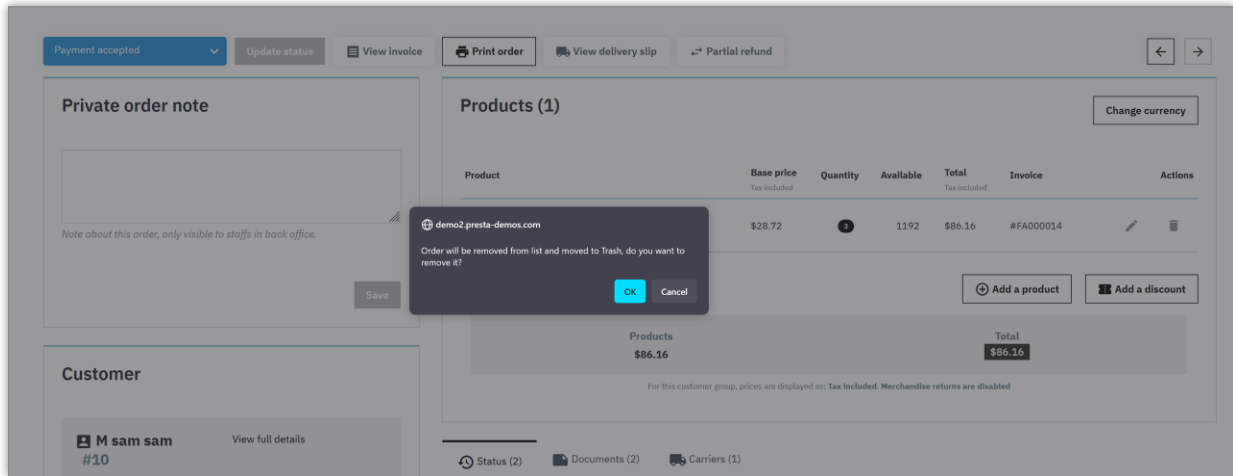
Click on "**View trash**" option to navigate to **Trash** page.
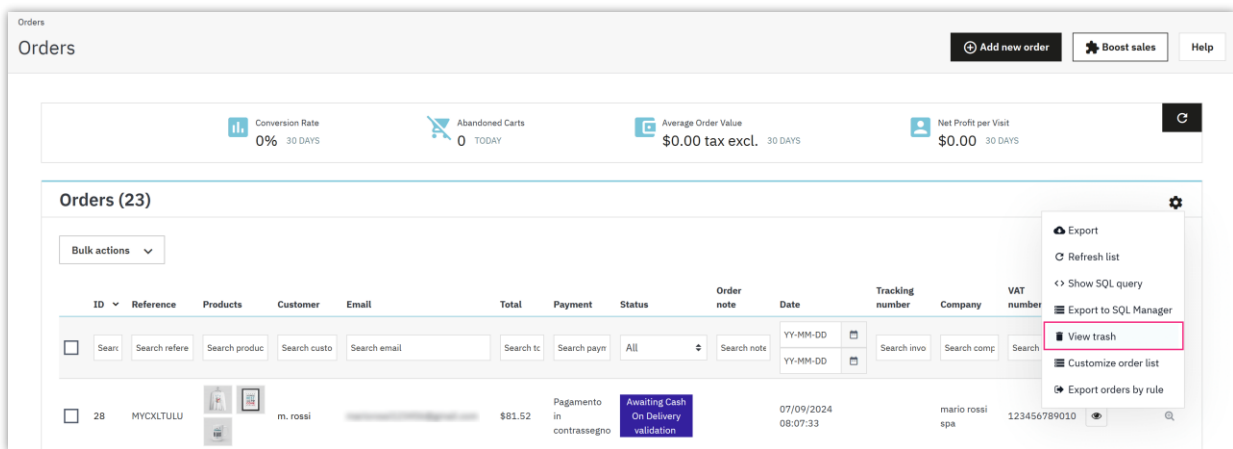
Select the "**Delete**" option to permanently delete an order. Select the "**Restore**" option to restore an order back to the order listing page.

5. Log in as a 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.
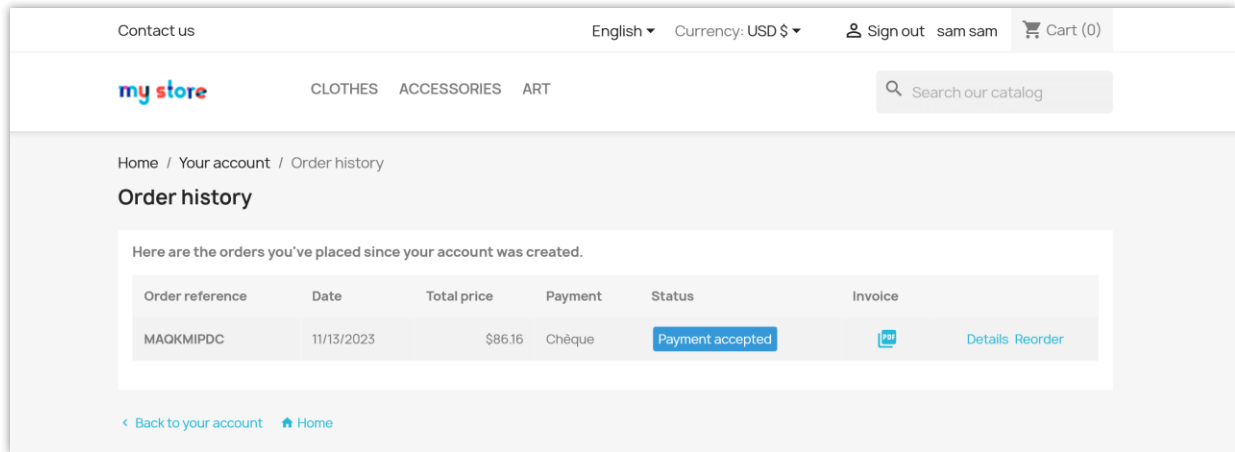
6. Assign order management permissions for staff profiles

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 profiles.
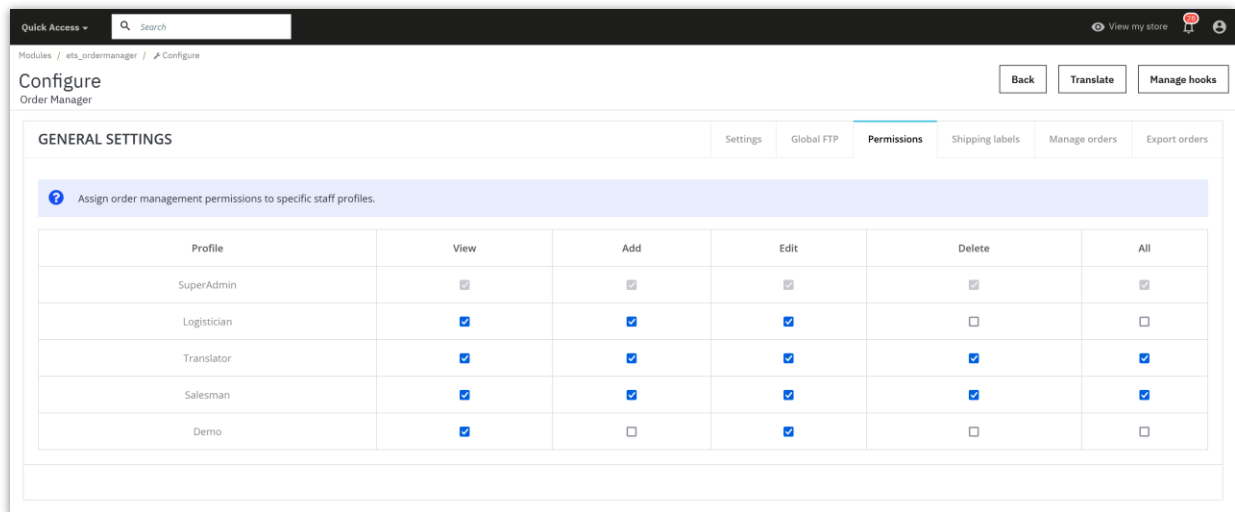
7. Customize shipping label

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

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.
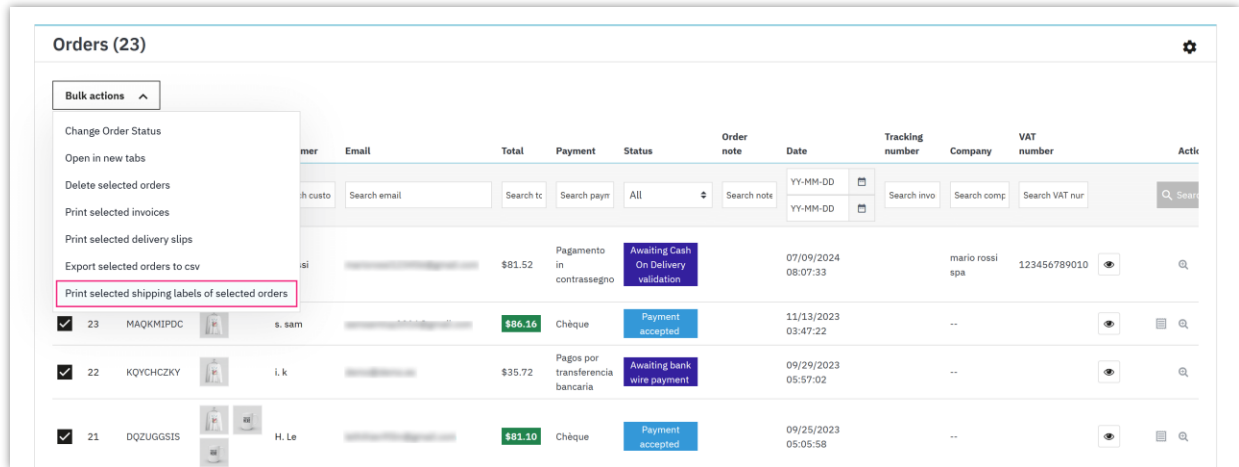
You can also print shipping label for a separate order:
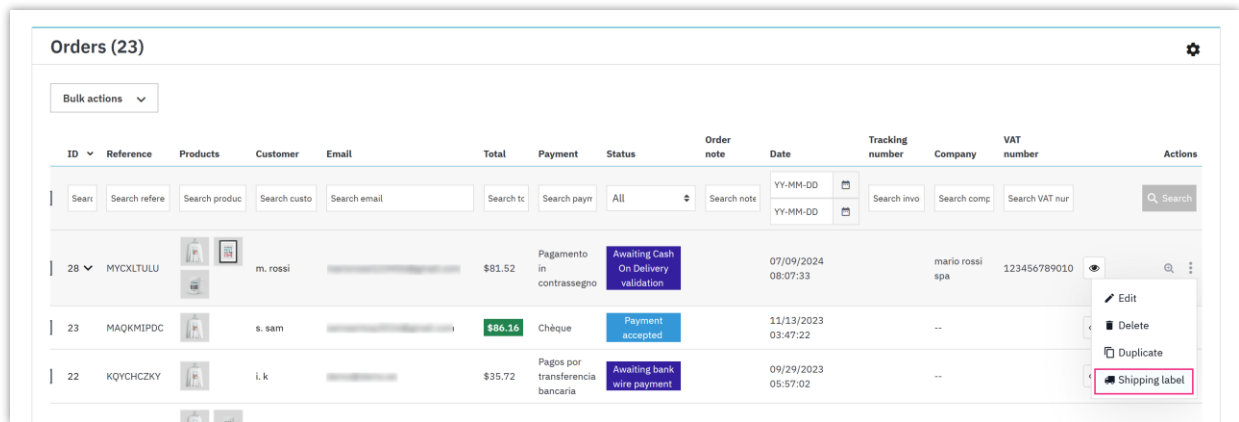
V.   EXPORT PRESTASHOP ORDERS

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.
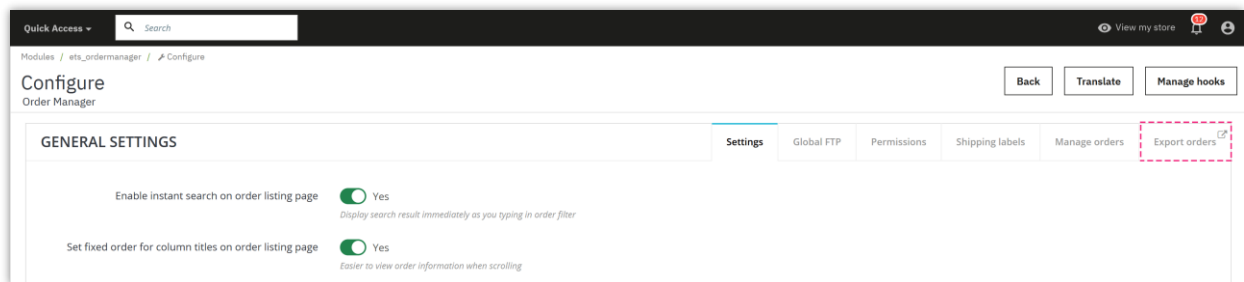
2. Create new export rule

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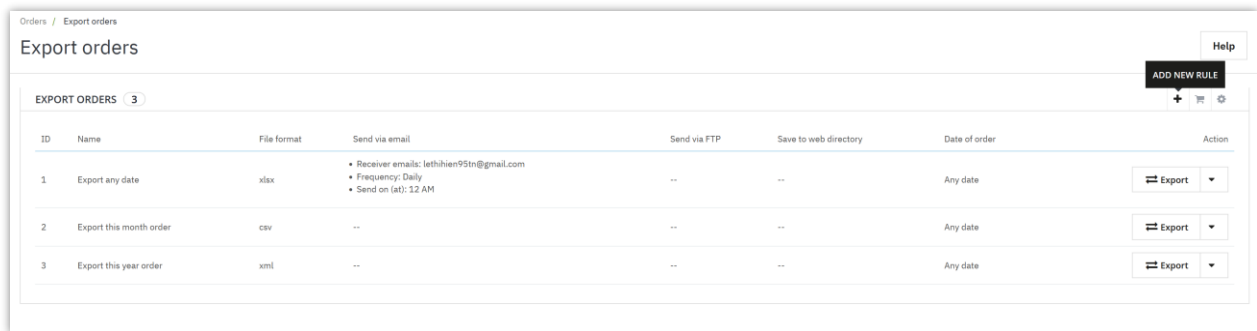
Fill in the fields on "**Information**" tab:

Navigate to "**Export fields**" tab > select export fields that 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:

EXPORT ORDERS

Date of order
- ◉ Any date
- ○ Today
- ○ Yesterday
- ○ This month (09/2024)
- ○ Month -1 (08/2024)
- ○ This year (2024)
- ○ Year -1 (2023)
- ○ From-To
- ○ The day before

Order status

```
All
Awaiting check payment
Payment accepted
Processing in progress
Shipped
Delivered
Canceled
Refunded
Payment error
On backorder (paid)
Awaiting bank wire payment
Remote payment accepted
```

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
Algeria
American Samoa
Andorra
Angola
Anguilla
Antarctica
Antigua & Barbuda
Argentina
```

Carriers

```
All
Click and collect
My carrier
My cheap carrier
My light carrier
```

Payment methods

```
All
Pagamento in contrassegno
Payment by check
Bank wire
```

Manufacturers

```
All
Studio Design
Graphic Corner
```

Suppliers

```
All
Fashion supplier
Accessories supplier
```

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

Include specific products

Search for product by name, reference or ID 🔍

Order total from

[ ] USD **To** [ ] USD

23

Navigate to "**Automation**" tab to set up the configuration for **auto-exporting orders using a cronjob**.

Click "**Save**" button to save your export rule.

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

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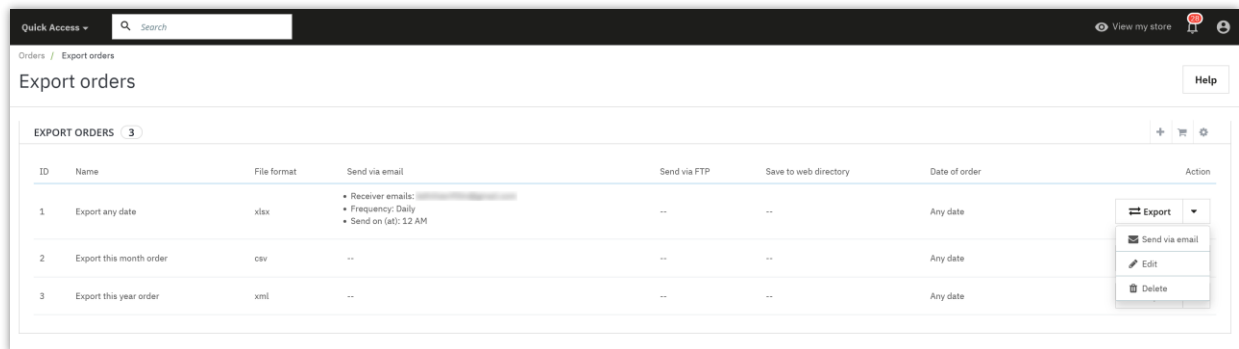
3. Settings

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 the cronjob feature. To set up a cronjob, open the module's configuration page and select "**Settings**" tab.

Click "**Save**" to apply the 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 the 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 an export file in XLSX format:

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 have any questions for which the answer is not available in this document, please feel free to contact us.