

# **X-Advanced Order Management for X-Cart Reference Manual**

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## General Information



**X-AOM (Advanced Order Management)** is an optional add-on for X-Cart shopping cart software. Designed for your convenience, this module is a powerful means to promote the efficiency of order management in your online store.

**X-AOM** introduces a number of new features enabling you to modify your customers' orders after they are placed. Order details modification may be necessary if your customer decides to change his order or make some additional requests after the original order has been submitted, or if you need to replace the items that are out of stock or defective, or want to process partial refunds or returns, etc.

**X-AOM** enables convenient and quick order management.

The key features of this module include:

1. Editing ordered products
  - adding new products to the order
  - removing products from the order
  - updating the options and quantity of ordered products
  - editing product prices
2. Editing Gift Certificates
  - changing the amount
  - updating the original information (before the certificate has been activated)
3. Editing customer information
  - updating personal and contact information
  - editing billing/shipping addresses
4. Editing order totals
  - changing delivery method
  - changing payment method
  - automatic recalculation of discounts, shipping costs, tax costs and order totals

**X-AOM** is a reliable and up-to-date solution that makes your business competitive.

You can purchase it at [www.x-cart.com](http://www.x-cart.com).

# Installation

## System Requirements

For successful installation and work of the module you need an already installed X-cart GOLD or PRO 3.5.4 and higher.

## Module Installation

To install the module you have to perform the following actions:

1. Download the module distributive (x-aom-x.y.z.tgz, where x,y,z are the numbers of the module version) from File area/Software distributives
2. Uncompress the x-aom-x.y.z.tgz file and copy the files to X-cart directory.
3. Run in the browser the installation script [http://www.yourhost.com/xcart\\_dir/install-xaom.php](http://www.yourhost.com/xcart_dir/install-xaom.php)
4. Enter your authentication code, accept conditions of the License Agreement and press "Next" button.

Note. The authentication code is issued on completion of X-Cart installation. It is used to prevent unauthorized re-installation of X-Cart and to install X-Cart modules (if you decide to purchase them). If you forget the code, you may look it up at any time in include/install.php file.

5. Installation script will copy the files and make all the necessary changes in the database.
6. After module Installation is completed you need to log in as admin and enable *Advanced Order Management* from the *Modules* section.

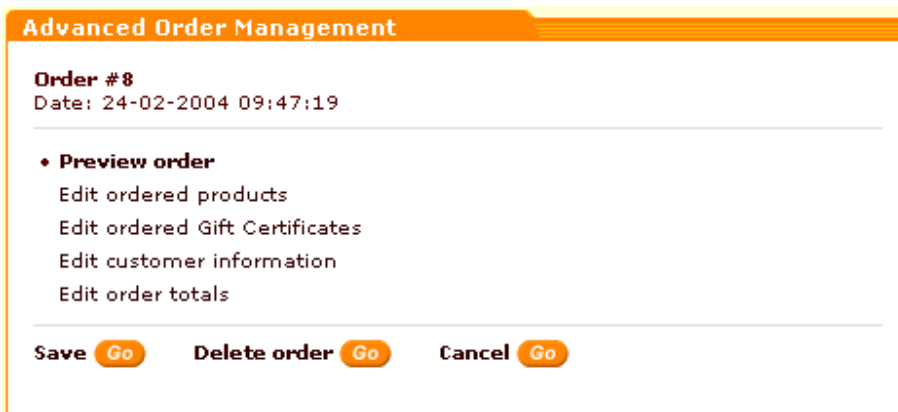
X-cart Gold and Pro module installations do not differ.

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# Using X-AOM (Advanced Order Management)

## Getting Started

Click *Orders* in the Management menu to access the 'Search orders' form and use it to search the order you would like to modify. The order will be displayed in 'Search results' list. Make sure the desired order is selected, then click *Details*. 'Order Details' section will be displayed. Click *Modify*. You will be taken to 'Advanced Order Management' section.



The screenshot displays the 'Advanced Order Management' interface. At the top, there is a header bar with the text 'Advanced Order Management'. Below this, the order details are shown: 'Order #8' and 'Date: 24-02-2004 09:47:19'. A horizontal line separates the header from the main content area. Underneath, there is a section titled '• Preview order' with a bulleted list of actions: 'Edit ordered products', 'Edit ordered Gift Certificates', 'Edit customer information', and 'Edit order totals'. At the bottom of the interface, there are three buttons: 'Save Go', 'Delete order Go', and 'Cancel Go', each with a small orange circle containing the word 'Go'.

From here you can either preview the order or edit order details. Select one of the listed options:

- Preview order
- Edit ordered products
- Edit ordered Gift Certificates
- Edit customer information
- Edit order totals

By default *Preview order* option is selected, so you can preview the order in the 'Order #numb.: Preview' section displayed below.

Order #8: Preview	
<b>Product info</b>	
<b>Indesit W103 Washing Machine (a) #134</b>	
SKU	-
Provider	provider
Price	\$ 1,549.00
Quantity	1 item(s)
<b>Order info</b>	
Payment method	Money Order
Delivery	
Subtotal	\$ 1,549.00
Discount	\$ 0.00
Coupon saving	\$ 0.00 ()
Shipping cost	\$ 0.00
Tax cost	\$ 0.00
<b>TOTAL</b>	<b>\$ 1,549.00</b>
<b>Customer's info</b>	
<i>Personal information:</i>	
Title	Mr.
First Name	Ivan
Last Name	Susanin
Company	Hiking Inc
<i>Billing Address:</i>	
First Name	John
Last Name	Smith
Address	Test
City	Test
State	Wisconsin
Zip code	54821
Country	United States
<i>Shipping Address:</i>	
First Name	John
Last Name	Smith
Address	Test
City	Test
State	Wisconsin

By clicking the 'Preview order' link you will be able to access this section any time you wish to preview the results of order editing.

Clicking the 'Edit' links (*Edit ordered products, Edit ordered Gift Certificates, Edit customer information or Edit order totals*) will display the module sections where the corresponding order details may be modified. After editing order details in each of these sections, be sure to click *Update* before you preview the order or try to save the changes permanently in the database. If you are not satisfied with the results of editing, click *Cancel* to undo all the changes. A confirmation message appears:

Confirmation
All modifications are cancelled

When you click *Save*, a warning appears in 'Advanced Order Management' section that the order information will be updated in the database.

**Advanced Order Management**

**Order #9**  
Date: 24-02-2004 13:35:44

---

You are going to update this order information in the database. Please confirm this by clicking the link below.

Notify customer by email

**Yes** [Go](#)    **No** [Go](#)

Select the 'Notify customer by e-mail' check box if you want your customer to receive a notification about the changes in his order information. You are requested to confirm your intention to save the changes. Clicking *No* enables you to continue editing. Clicking *Yes* saves the changes in the database and (if selected) sends the update notification to your customer. A confirmation message appears:

**Confirmation**

Order has been successfully updated

**Note.** *Cancel* does not work after the information in the database has been updated.

If necessary, the selected order may be deleted by clicking *Delete* in the lower part of 'Advanced Order Management' section.

## Editing ordered products

Selecting *Edit ordered products* option in 'Advanced Order Management' section will open 'Order #numb.: Edit Products' section below it.

**Order #12: Edit Products**

---

**Product info**

**#130. Hotpoint WD61Washer Dryer (b)**

<input type="checkbox"/> Delete	Current	Original
SKU	-	-
Provider	provider	provider
Catalog Price	\$ 1,250.00	\$ 1,250.00
Price	<input type="text" value="\$ 1,250.00"/>	\$ 1,250.00
Quantity, item(s)	<input type="text" value="2"/>	2
Quantity in stock, item(s)	98	98

**#16130. Pocket T (summer colors)**

<input type="checkbox"/> Delete	Current	Original
SKU	-	-
Provider	provider	provider
Catalog Price	\$ 14.50	\$ 14.50
Price	<input type="text" value="\$ 14.50"/>	\$ 14.50
Quantity, item(s)	<input type="text" value="1"/>	1
Quantity in stock, item(s)	1000	1000
Selected options (already considered in the price)	Color: <input type="text" value="White"/>	
	Size: <input type="text" value="S"/>	

**Add product**

#

**Update**

*Product Info* editing:

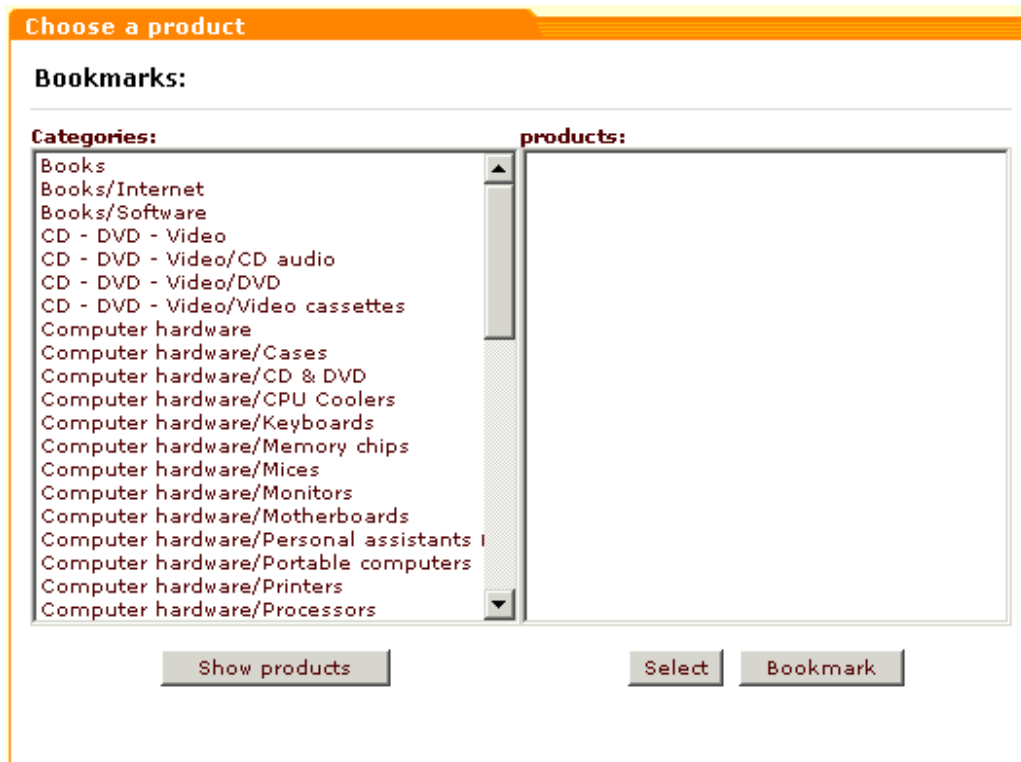
If you need to completely remove a product from the order, select the *Delete* check box.

You can see the original product information (information before editing) in the *Original* column. Changed product information should be entered in the *Current* column.

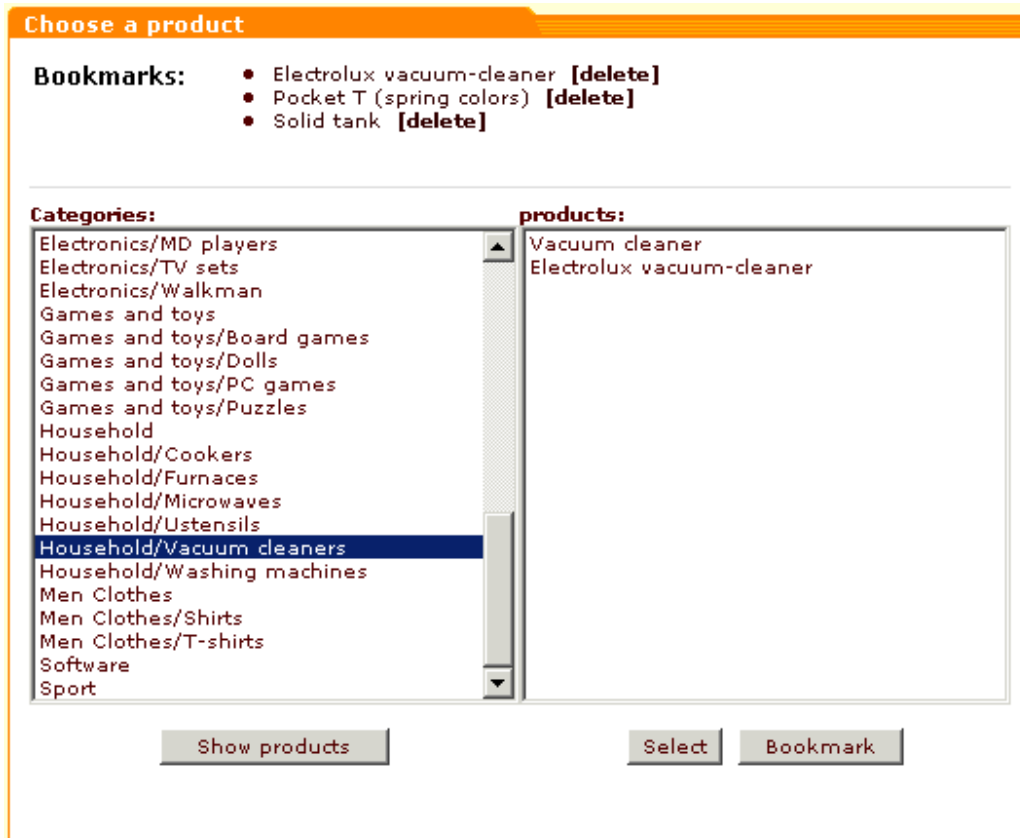
You can change the price of the product by entering the new price in the corresponding field. Similarly you can change the quantity of the ordered product (the number of items/units). If product options are assigned (like color, size, etc), you can change those by selecting the necessary option value from the drop-down list.

**Adding products:**

X-AOM enables you to add products to orders. Click the *Browse* button to choose a product. The following dialog will be displayed:



Select a product category from the list on the left, click the *Show products* button. The set of products in this category will be displayed on the right. Select a product, then click the *Select* button to add this product to the order. You can bookmark several products and add them to the order later. To bookmark a product, select it and click the *Bookmark* button. The bookmarked product appears in the Bookmarks list in the upper part of the dialog. To remove a product from the Bookmarks list, click [delete] next to the corresponding product title. To add a bookmarked product to the order, click the product title in the Bookmarks list.



Be sure to click Update to confirm the changes after you finish editing ordered products.

---

## Editing ordered Gift Certificates

If you need to edit ordered Gift Certificates, select *Edit ordered Gift Certificates* option in the Advanced Order Management section. "Order #numb.: Edit Gift certificates" section will be displayed.

**Order #9: Edit Gift certificates**

**Gift certificates**

**Gift Certificate ID #B07E17AF80F4B103**

<input type="checkbox"/> Delete	Current	Original
Amount	<input type="text" value="\$ 300.00"/>	\$ 300.00
Recipient	Jill Smith	Jill Smith
Recipient email	jillsmith2004@pitem.net	jillsmith2004@pitem.net

**Update**

The certificate can be deleted by selecting the *Delete* check box.

You can change the amount of money listed in the certificate. Enter the desired amount in the corresponding field of the *Current* column.

Sometimes you might need to edit the original Gift Certificate information (the recipient's name, the sender's name, the notification message, the amount of money or the delivery method) before the Gift Certificate is activated. Click on the line with the Gift Certificate ID#. It is a link which will transfer you to the section where you will be able to change the original Gift Certificate information:

### Gift certificate

- 1. Who are you sending this to?**

The gift certificate will include the sender's name, the recipient's name and a message.

From \*

To \*
- 2. Add a message**

Message
- 3. Choose an amount**

Specify the amount in currency.

\$ \*
- 4. Choose a delivery method**

**Send via E-mail**  
Enter the e-mail who you send a Gift Certificate to.

E-Mail \*

---

**Send via Postal Mail**  
Enter the postal address who you're sending a Gift Certificate to.

---

Be sure to update the Gift Certificate after editing. Next, you will be transferred to the Gift Certificates management section. If need be, you can update the status of the Gift Certificate here. The changes you made to the original information will be displayed only in the *Original* column as long as the Gift Certificate status is *Pending*. After the status is changed, the updated information appears in the *Current* column.

If the Gift Certificate status is other than *Pending*, the original information cannot be modified. In this case on clicking the Gift Certificate ID# link the 'Gift Certificate details' section is displayed:

**Gift Certificate details**  

---

**Gift Certificate Details**

---

From: **Ivan Susanin**  
To: **Jack Smith**  
Message: Hello, Jack. This is the Gift Certificate I promised to order for you.  
Amount: **\$ 200.00**

---

**E-mail Address**

---

E-Mail: **jacksmith2004@pisem.net**

**Go Back** [Go](#)

Be sure to click Update to confirm the changes after you finish editing ordered Gift Certificates.

## Editing customer information

If you need to edit customer information, select *Edit customer information* in the 'Advanced Order Management' section. The following section will be displayed:

**Order #9: Edit Customer Information**

**Customer's info**

*Personal information:*

	Current	Original
Title	Mr. <input type="text"/>	Mr.
First Name	Ivan <input type="text"/>	Ivan
Last Name	Susanin <input type="text"/>	Susanin
Company	Hiking Inc <input type="text"/>	Hiking Inc
Membership	Not member <input type="text"/>	Not member

*Billing Address:*

	Current	Original
Title	Mr. <input type="text"/>	Mr.
First Name	John <input type="text"/>	John
Last Name	Smith <input type="text"/>	Smith
Address	Test <input type="text"/>	Test
City	Test <input type="text"/>	Test
State	US: Wisconsin <input type="text"/>	Wisconsin
Zip code	54821 <input type="text"/>	54821
Country	United States <input type="text"/>	United States

*Shipping Address:*

	Current	Original
Title	Mr. <input type="text"/>	Mr.
First Name	John <input type="text"/>	John
Last Name	Smith <input type="text"/>	Smith
Address	Test <input type="text"/>	Test
City	Test <input type="text"/>	Test
State	US: Wisconsin <input type="text"/>	Wisconsin

The original customer information (information before editing) can be seen in the *Original* column.

The customer's updated personal information, billing/shipping addresses and contact information should be entered in the corresponding fields of the *Current* column.

Be sure to click Update to confirm the changes after you finish editing customer information.

## Editing order totals

To edit order totals, select *Edit order totals* option in the 'Advanced Order Management' section. The following section will be displayed:

**Order #11: Edit Totals**

**Order info**

Product	Price	Discount	Discount coupon	Discounted price	Quantity	Subtotal
#146	\$ 630.00	\$ 18.90	\$ 0.00	\$ 611.10	1	\$ 611.10
<b>Summary:</b>	<b>*\$ 630.00</b>	\$ 18.90	\$ 0.00	\$ 611.10		<b>**\$ 611.10</b>

**Notes:**

1. The values in the Summary row are represented with consideration of quantity.
2. \* This value is used for applying discounts.
3. \*\* This value is used for shipping cost calculation.

	Current	Original
Payment method	<input type="text" value="Credit Card (manual processing)"/>	Credit Card (manual processing)
Delivery	<input type="text" value="FedEx 2nd Day (\$ 0.00)"/>	FedEx 2nd Day
Subtotal	\$ 630.00	\$ 1,260.00
Discount	\$ 18.90	\$ 63.00
Coupon saving	\$ 0.00 ()	\$ 0.00 ()
Discounted subtotal	\$ 611.10	\$ 1,197.00
Shipping cost	\$ 0.00	\$ 0.00
Tax cost	\$ 36.67	\$ 36.67
<b>TOTAL</b>	<b>\$ 647.77</b>	<b>\$ 1,268.82</b>

**Update**

You can see the original order totals information (information before editing) in the *Original* column. If you wish to change the payment method or the delivery method, new methods can be selected from the drop-down lists in the *Current* column.

The recalculation of discounts, shipping costs, tax costs and order totals is done automatically if any relevant order details have been modified.

Be sure to click Update to confirm the changes after you finish editing order totals.

## Appendix

Here is a list of files included into the module:

```
INSTALL.X-AOM
install-xaom.php

modules/Advanced_Order_Management/...
order_edit.php

skin1_original/modules/Advanced_Order_Management/...
confirm_deletion.tpl
confirmation.tpl
edit_customer.tpl
edit_giftcerts.tpl
edit_products.tpl
edit_totals.tpl
order_edit.tpl
preview.tpl

skin1_original/mail/...
order_updated_customer.tpl
order_updated_customer_subj.tpl

skin1_original/mail/html/...
order_updated_customer.tpl

sql/...
x-aom.sql
x-aom_remove.sql
```

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