

X-AOM add-on module for X-Cart 4.2.0

User Manual



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X-AOM add-on module

for X-Cart 4.2.0

User Manual

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This User Manual is intended for X-AOM add-on module for X-Cart v. 4.2.0. It covers most of the areas of the add-on module's installation and use and is applicable for both X-Cart GOLD and X-Cart PRO versions.

X-AOM add-on module for X-Cart 4.2.0. User manual.

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Thank you for choosing X-Cart software solutions!

1 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.

2 Installation

Learn to install and uninstall X-AOM:

- [learn about the system requirements](#)
- [installing X-AOM](#)
- [uninstalling X-AOM](#)

2.1 System Requirements

For successful installation and work of the module you need an already installed X-cart GOLD or PRO 4.2.0.

2.2 Installing the module

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, must be the same as the version of your X-Cart).) from File area/Software distributives
2. Uncompress the **x-aom-x.y.z.tgz** file and copy the files to X-cart directory.

Note: Please make sure you keep the directory structure during unpacking and uploading, otherwise some necessary files can be overwritten!

3. Run in the browser the installation script **http://www.yourhost.com/xcart_dir/install-xaom.php**

4. Enter your authentication code, accept conditions of the License Agreement and click the **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. You also need to know this code to install any purchased X-Cart modules. If you do not remember your Auth code, you can look it up at any time in the file include/install.php.

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.

2.3 Uninstalling the module

To uninstall X-AOM, do the following:

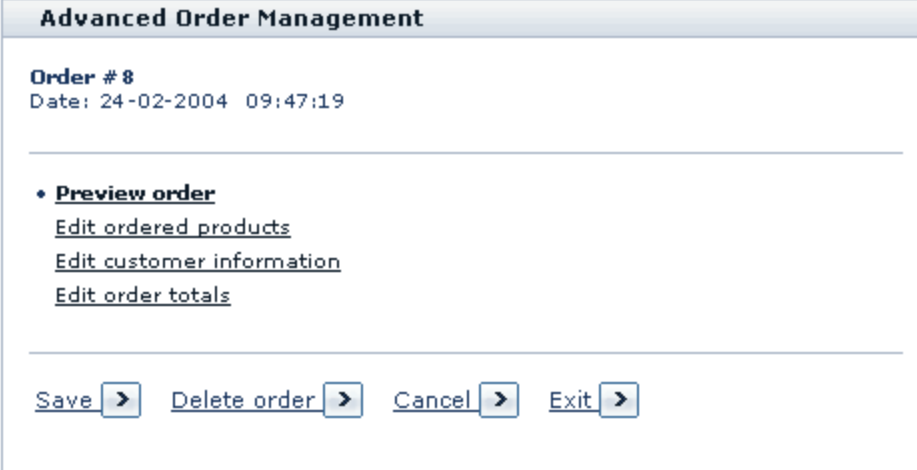
1. Launch the Installation Wizard (Point your browser at the location of your store with the addition of / install-xaom.php)
2. At the first step of the Installation Wizard (**Step 1: License agreement**), select the 'Un-install the module' radio button.
3. Click the **Next** button.
4. The Installation Wizard will remove the module files and deactivate the module (**Step 2: Uninstalling the module**). Click **Next** to proceed.
5. **Step 3: Uninstallation complete** is the final step of the uninstallation process. It notifies you that the module has been successfully uninstalled.

Important: After uninstalling X-AOM, be sure to remove the module distribution package from your web directory.

3 Using X-AOM

3.1 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 shows a window titled "Advanced Order Management". Inside, it displays "Order # 8" and "Date: 24-02-2004 09:47:19". Below this, there is a section titled "• Preview order" with three sub-options: "Edit ordered products", "Edit customer information", and "Edit order totals". At the bottom, there are four buttons: "Save", "Delete order", "Cancel", and "Exit", each with a right-pointing arrow.

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	
Products info	
#134. Indesit W103	
SKU	SKU134
Provider	provider
Price	\$1549.00
Quantity	1 item(s)
Selected options	
Order info	
Payment method	Money Ordering
Delivery method	
Subtotal	\$1549.00
Discount	\$0.00
Coupon saving	\$0.00 ()
Shipping cost	\$0.00
TOTAL	\$1549.00
Customer info	
<i>Personal information:</i>	
Username	<u>customer</u>
Title	Mr.
First name	Ivan
Last name	Susanin
Company	Hiking Inc
Tax number	
<i>Billing Address:</i>	
Address	Test
Address (line 2)	
City	Test
State	Wisconsin
Zip/Postal code	54821
Country	United States
<i>Shipping Address:</i>	
Address	Test
Address (line 2)	
City	Test
<i>Order notes (not visible to customer):</i>	
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>	

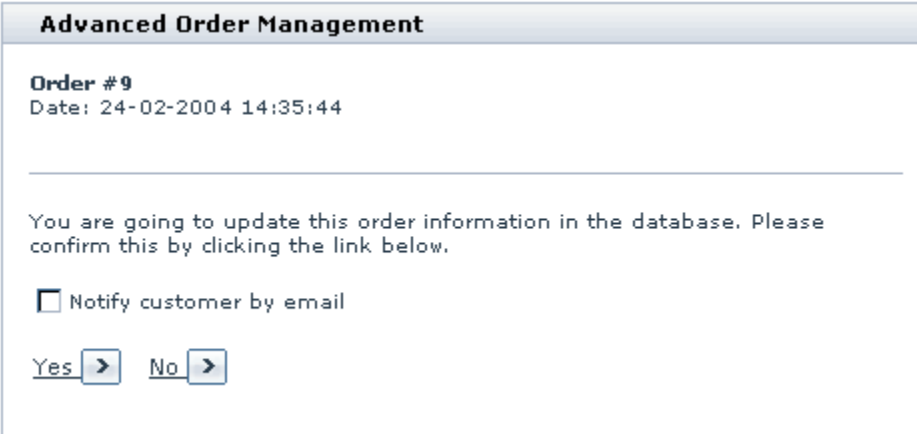
By clicking the '[Preview order](#)' link you will be able to access this section any time you wish to preview the results of order editing.

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.

Note: be aware that incorrect module operation is possible when the admin edits two or more orders simultaneously during one session. It is recommended to finish editing using the Save, Cancel, Delete order, and Exit buttons.

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



The screenshot shows a dialog box titled "Advanced Order Management". Inside, it displays "Order #9" and "Date: 24-02-2004 14:35:44". Below this, a horizontal line separates the header from the main text: "You are going to update this order information in the database. Please confirm this by clicking the link below." There is a checkbox labeled "Notify customer by email" which is currently unchecked. At the bottom, there are two buttons: "Yes" and "No", each with a right-pointing arrow.

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.

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.

3.2 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 WD61

<input type="checkbox"/> Delete	Current	Original
SKU	SKU130	SKU130
Provider	provider	provider
Catalog price	\$1250.00	\$1250.00
Price	<input style="width: 80px;" type="text" value="1250.00"/>	\$1250.00
Quantity, item(s)	<input style="width: 40px;" type="text" value="2"/>	2
Available in stock, item(s)	98	98
Selected options (already considered in the price)		

#16130. T-Shirt with pocket (summer colors)

<input type="checkbox"/> Delete	Current	Original
SKU	SKU1613017	
Provider	provider	
Catalog price	\$14.69	
Price	<input style="width: 80px;" type="text" value="14.69"/>	
Quantity, item(s)	<input style="width: 40px;" type="text" value="1"/>	
Available in stock, item(s)	1000	
Selected options (already considered in the price)		
	Color	<input style="width: 80px;" type="text" value="White"/>
	Size	<input style="width: 40px;" type="text" value="S"/>

Add product

#

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.

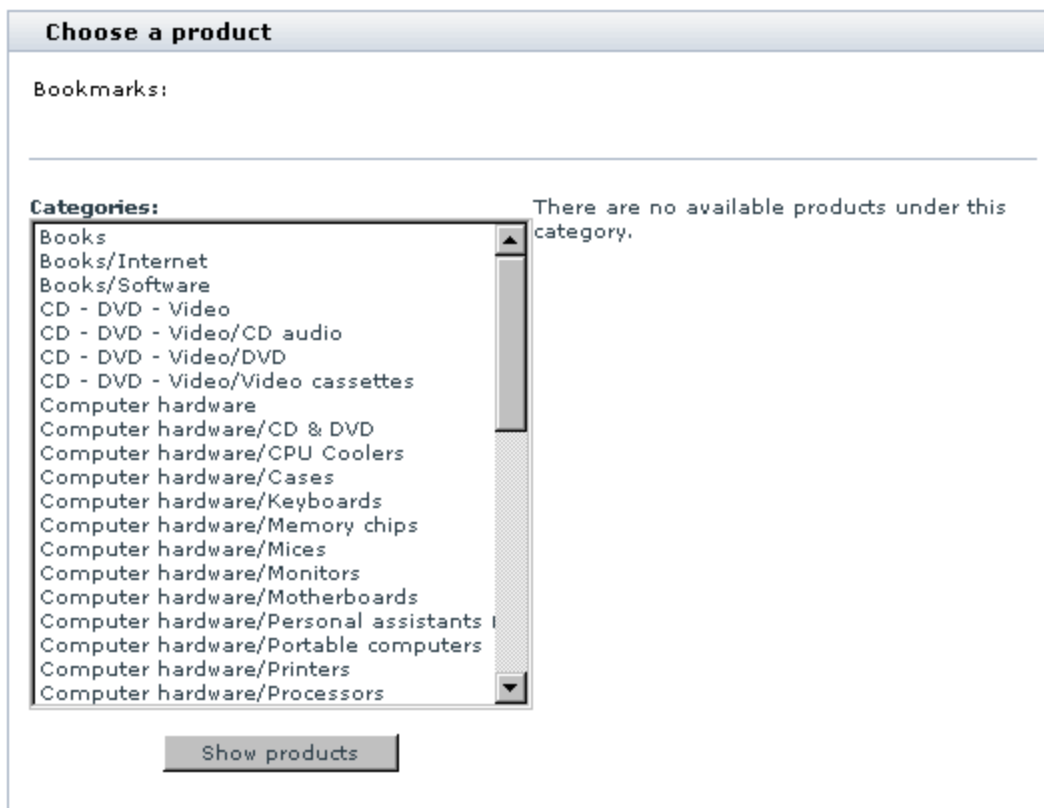
Note: catalog price - the price of the default product variant. If the default variant is not selected, the combination of first valid product options is going to be considered default product variant. 'Valid options' means the options used are enabled and are not excluded from option combinations.

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.

Note: please keep in mind that the price of the product does not change if product options are assigned. The product options drop-down box is for your information only. If you assign different product options to the product, you will have to calculate and enter the price of the product manually.

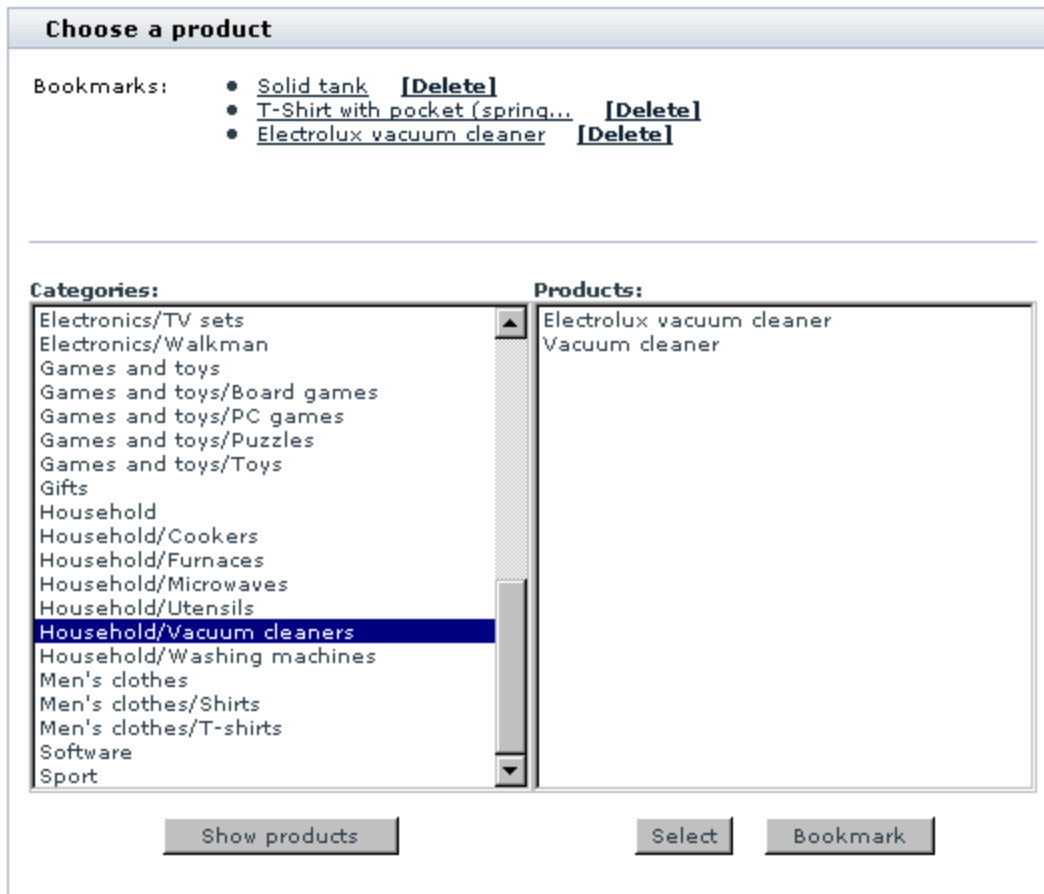
Adding products:

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.

3.3 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's e-mail	jillsmith2004@example.com	jillsmith2004@example.com

[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 details

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
Enter the text that the recipient will see in the e-mail

Message

3. Choose an amount
Specify the amount in currency.

\$ *

4. Choose a delivery method

Send via E-mail
Enter the e-mail address of the person you are sending the Gift Certificate to.

E-mail *

Send via Postal Mail
Enter the postal address of the person you are sending the Gift Certificate to.

First name *

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:
Amount: **\$200.00**
Template: **template_default.tpl**

E-mail Address

E-mail: **jacksmith2004@example.com**

[Go Back](#)

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

3.4 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 info		
<i>Personal information:</i>		
	Current	Original
Title	Mr. ▾	Mr.
First name	Ivan	Ivan
Last name	Susanin	Susanin
Company	Hiking Inc	Hiking Inc
Tax number		
Membership	Not member ▾	Not member
<i>Billing Address:</i>		
	Current	Original
Address	Test	Test
Address (line 2)		
City	Test	Test
State	US: Wisconsin	Wisconsin
Country	United States ▾	United States
Zip/Postal code	54821	54821
<i>Shipping Address:</i>		
	Current	Original
Address	Test	Test
Address (line 2)		
City	Test	Test
State	US: Wisconsin	Wisconsin
Country	United States ▾	United States
Zip/Postal code	54821	54821

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.

3.5 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 #1037: edit totals			
Order info			
Product	Price	Quantity	Subtotal
<u>SKU67 . Designing Web Usability</u>	\$23.38	2	\$46.76
Summary:			\$46.76
	Current		Original
Payment method	Phone Ordering Other: <input type="checkbox"/> Phone Ordering		Phone Ordering
Delivery method	test_national (\$1.00)		test_national
Subtotal	\$46.76		\$46.76
Discount	\$0.00		\$0.00
Use other discount	<input checked="" type="checkbox"/> 0.00 \$		\$0.00
Coupon saving	\$0.00 (None)		\$0.00
New coupon saving	<input type="checkbox"/> 0.00		
Shipping cost	\$1.00		\$1.00
Use fixed shipping cost*	<input checked="" type="checkbox"/> 1.00		
TOTAL	\$46.76		\$46.76
Update >			
Note: You can enter a shipping cost value directly into the fixed shipping cost field. It will be used instead of the calculated value.			

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, tax costs and order totals is done automatically if any relevant order details have been modified.

Note: Please keep in mind that shipping cost that have been included into the invoice is not changed automatically on the 'Edit totals' page if the option **'Use fixed shipping cost'** is selected (it is enabled by default). This is done to make sure shipping charges do not change without store admin knowing it. For example, if real-time shipping calculation is enabled and the rate returned by the calculator differs from the shipping cost specified in the customer invoice, the old fixed shipping cost will be used and the unexpected changes will not take effect.

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

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