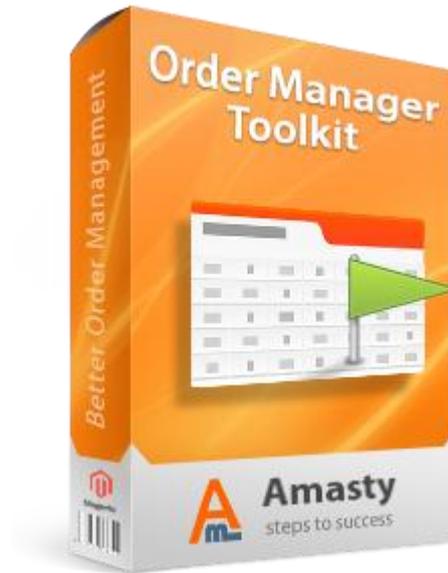


# Order Manager Toolkit



## Magento Extension User Guide

**Official extension page:** [Order Manager Toolkit](#)

**User Guide:** [Order Manager Toolkit](#)

Support: <http://amasty.com/contacts>



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# 1. Order Manager Toolkit: functionality on the order grid

Display of product thumbnails on the grid.

3 additional columns for shipping and payment information.

Different types of attachments created with the order can be added to the grid.

Page 1 of 1 pages 20 per page Total 4 records found

Select Visible | Unselect Visible | 0 items selected

Export to: CSV

Reset Filter Search

Create New Order

Flags	Coupon Code	Shipping Code	Payment Method	Shipping Address	Order Status	Shipping	Actual Shipping Date	Customer Security ID	Sales Person	Name	Action	
<input type="checkbox"/> <span style="color: red;">▲</span>		Flat Rate - Fixed	Check / Money order	Denny Red Red str. 4 New York, Illinois, 1234 United States T: 242362638293	100	Shipping	Carrier: <input type="text"/> Custo <input type="text"/> Tracking Number: <input type="text"/>	Oct 12, 2013	<a href="#">idcard.jpg</a> <a href="#">idpassport.jpg</a>	Alex	22" Syncmaster LCD Monitor (1) AMD A64 X2 3800+ 2.0GHz OEM (1)	<a href="#">View</a>
<input type="checkbox"/> <span style="color: yellow;">▲</span>		Flat Rate - Fixed	Check / Money order	Randy Pickerman Tennet str. 54 London, 45354 United Kingdom T: 54653425627	100	Shipping	Carrier: <input type="text"/> Custo <input type="text"/> Tracking Number: <input type="text"/>		<a href="#">randypickerman.jpg</a>	Kate	AMD A64 X2 3800+ 2.0GHz OEM (1)	<a href="#">View</a>
<input type="checkbox"/> <span style="color: red;">▲</span>		Flat Rate - Fixed	Check / Money order	John Black Example str. 67 Denver, Delaware, 54656 United States T: 6575664577	100	Hold		No Uploaded File	Craig	Intel C2D E8400 3.0GHz Retail (1) 24" Widescreen Flat-Panel LCD Monitor (1)	<a href="#">View</a>	
<input type="checkbox"/> <span style="color: blue;">▲</span>		Flat Rate - Fixed	Check / Money order	John Doe Baker str, 10 New York, New York, 56468 United States T: 12567879865	100	Shipping	Carrier: <input type="text"/> Custo <input type="text"/> Tracking Number: <input type="text"/>		No Uploaded File		My C	<a href="#">View</a>

Flags of different colors show the priority of the orders.

Quantity of items of certain product in the order is shown.



## 2. Extended grid: Manage columns on the order grid

### Columns Configuration

#### Columns Configuration

Please open Admin panel -> System -> Amasty Extended Order grid -> Columns Configuration to add new columns to the order grid.

Choose the fields which you would like to add to the order grid.

### Manage Columns

Save Columns

New Fields	Width(px)	Order
<input checked="" type="checkbox"/> Images	<input type="text" value="100"/>	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Coupon Code	<input type="text" value="70"/>	<input type="text" value="77"/>
<input checked="" type="checkbox"/> Shipping Method	<input type="text" value="default"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Payment Method	<input type="text" value="default"/>	<input type="text" value="4"/>
<input checked="" type="checkbox"/> Shipping Address	<input type="text" value="70"/>	<input type="text" value="5"/>
<input checked="" type="checkbox"/> Shipping: Country	<input type="text" value="default"/>	<input type="text" value="51"/>
<input checked="" type="checkbox"/> Shipping: Region	<input type="text" value="default"/>	<input type="text" value="61"/>
<input checked="" type="checkbox"/> Shipping: City	<input type="text" value="default"/>	<input type="text" value="71"/>
<input checked="" type="checkbox"/> Shipping: Postcode	<input type="text" value="default"/>	<input type="text" value="81"/>
<input checked="" type="checkbox"/> Shipping: Street	<input type="text" value="default"/>	<input type="text" value="91"/>
<input checked="" type="checkbox"/> Billing Address	<input type="text" value="default"/>	<input type="text" value="6"/>
<input type="checkbox"/> Billing: Country	<input type="text" value="default"/>	<input type="text" value="111"/>
<input checked="" type="checkbox"/> Billing: Region	<input type="text" value="default"/>	<input type="text" value="121"/>
<input checked="" type="checkbox"/> Billing: City	<input type="text" value="default"/>	<input type="text" value="131"/>
<input checked="" type="checkbox"/> Billing: Postcode	<input type="text" value="default"/>	<input type="text" value="141"/>
<input type="checkbox"/> Billing: Street	<input type="text" value="default"/>	<input type="text" value="151"/>
<input checked="" type="checkbox"/> Customer Email	<input type="text" value="default"/>	<input type="text" value="7"/>

Once you've set up new columns, please click the 'Save Columns' button.

Here you can specify the column width and its order on the grid.



## 2. Extended grid: Manage columns on the order grid

### Columns Configuration

#### Columns Configuration

### Manage Columns

 Save Columns

Default Fields	Width(px)	Order
<input checked="" type="checkbox"/> Order #	<input type="text" value="100"/>	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Purchased On	<input type="text" value="default"/>	<input type="text" value="10"/>
<input checked="" type="checkbox"/> Bill to Name	<input type="text" value="default"/>	<input type="text" value="11"/>
<input checked="" type="checkbox"/> Ship to Name	<input type="text" value="default"/>	<input type="text" value="12"/>
<input checked="" type="checkbox"/> G.T. (Base)	<input type="text" value="default"/>	<input type="text" value="13"/>
<input checked="" type="checkbox"/> G.T. (Purchased)	<input type="text" value="default"/>	<input type="text" value="14"/>
<input checked="" type="checkbox"/> Status	<input type="text" value="default"/>	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Purchased From (Store)	<input type="text" value="default"/>	<input type="text" value="9"/>
<input type="checkbox"/> Action	<input type="text" value="default"/>	<input type="text" value="16"/>

Once you've set up new parameters, please click the 'Save Columns' button.

If it's required you can delete default fields from the order grid, or configure their width and order.



## 2. Extended grid: Manage columns on the order grid

### Columns Configuration

#### Columns Configuration

Here you can add columns with the necessary attributes.

### Manage Columns

 Save Columns

Product Attributes	Width(px)	Order
<input type="checkbox"/> Activation Information	<input type="text" value="default"/>	<input type="text" value="17"/>
<input checked="" type="checkbox"/> Color	<input type="text" value="100"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> Brand	<input type="text" value="default"/>	<input type="text" value="19"/>
<input type="checkbox"/> Contrast Ratio	<input type="text" value="default"/>	<input type="text" value="20"/>
<input type="checkbox"/> Cost	<input type="text" value="default"/>	<input type="text" value="21"/>
<input type="checkbox"/> Country of Manufacture	<input type="text" value="default"/>	<input type="text" value="22"/>
<input type="checkbox"/> Country of Origin	<input type="text" value="default"/>	<input type="text" value="23"/>
<input type="checkbox"/> CPU Speed	<input type="text" value="default"/>	<input type="text" value="24"/>
<input type="checkbox"/> Custom Layout Update	<input type="text" value="default"/>	<input type="text" value="25"/>
<input type="checkbox"/> Description	<input type="text" value="default"/>	<input type="text" value="26"/>
<input type="checkbox"/> Dimensions	<input type="text" value="default"/>	<input type="text" value="27"/>
<input type="checkbox"/> Is Product Available for Purchase with Google Checkout	<input type="text" value="default"/>	<input type="text" value="28"/>
<input type="checkbox"/> Finish	<input type="text" value="default"/>	<input type="text" value="29"/>
<input type="checkbox"/> Gender	<input type="text" value="default"/>	<input type="text" value="30"/>
<input type="checkbox"/> Allow Gift Message	<input type="text" value="default"/>	<input type="text" value="31"/>
<input type="checkbox"/> Group Price	<input type="text" value="default"/>	<input type="text" value="32"/>
<input type="checkbox"/> Disk Speed	<input type="text" value="default"/>	<input type="text" value="33"/>
<input type="checkbox"/> Hardrive	<input type="text" value="default"/>	<input type="text" value="34"/>

Once you've set up new parameters, please click the 'Save Columns' button.

Specify the column width and its order on the grid.



## 2. Extended grid: Manage columns on the order grid

### Columns Configuration

#### Columns Configuration

### Manage Columns

 Save Columns

Static Attributes		Width(px)	Order
<input checked="" type="checkbox"/>	company	default	17
<input checked="" type="checkbox"/>	Type column key here	default	73
<input checked="" type="checkbox"/>	Type column key here	default	74
<input checked="" type="checkbox"/>	Type column key here	default	75
<input checked="" type="checkbox"/>	Type column key here	default	76

Once you've set up new parameters, please click the 'Save Columns' button.

If you use other extensions which add columns to the order grid, please specify the ID of exist columns.

Also you can change the column width and its order on the grid.



### 3. Extended grid: Settings

Please go to admin panel -> System -> Configuration -> Extended Order Grid to manage the extension settings.

**Extended Order Grid**

Current Configuration Scope: Default Config [Manage Stores](#)

**Configuration**

- AMASTY EXTENSIONS
  - General
  - Order Manager: Extended Grid**
  - Order Manager: Notes and Files
  - Order Manager: Mass Actions

**General Settings**

Max products display per order on the grid: 5  
▲ By default, the data on order grid is shown for maximum 5 products per order. Please specify the number which suits you best. All product data can be seen in a popup right on the order grid.

Hide Configurable Parents: Yes  
▲ If to hide parent products for configurable items

Hide orders with statuses:  
Canceled  
Closed  
Complete  
Suspected Fraud  
On Hold  
New Order Status  
Payment Review  
PayPal Canceled Reversal  
PayPal Reversed  
Pending

[Save Config](#)

Select orders with which statuses to exclude from the grid.

If you choose 'Canceled' and 'Complete' like here, orders with 'Complete' and 'Canceled' statuses will be hidden on the order grid. They will be displayed again, once you deselect the statuses.



## 4. Mass Actions: Order actions on the Grid

With Order Manager Toolkit you can perform mass actions with the orders right from the order grid. Just select the orders you need, choose the action you want to apply and click 'Submit' button.

Orders

Create New Order

Page 1 of 1 pages | View 20 per page | Total 4 records found | New

Export to: CSV

Reset Filter

Order RSS

Export

Search

Select Visible | Unselect Visible | 2 items selected

Flags	Coupon Code	Shipping Code	Payment Me	Actions	Order #
Any					
<input checked="" type="checkbox"/>		Flat Rate - Fixed	Check / Mon order	<ul style="list-style-type: none"><li>Cancel</li><li>Hold</li><li>Unhold</li><li>Print Invoices</li><li>Print Packingslips</li><li>Print Credit Memos</li><li>Print All</li><li>Print Shipping Labels</li><li>---Order-Flags-Actions---</li><li>For Flags Column</li><li>Remove Flags</li><li>-----</li><li>Invoice</li><li><b>Invoice &gt; Capture</b></li><li>Invoice &gt; Ship</li><li>Invoice &gt; Capture &gt; Ship</li><li>Capture &gt; Ship</li><li>Capture</li><li>Ship</li></ul>	100000004
<input checked="" type="checkbox"/>		Flat Rate - Fixed	Check / Mon order		100000003

United Kingdom  
T: 54653425627

All the new actions can be enabled in configuration section (See page).



# 5. Mass Actions: Settings

Current Configuration Scope:  
Default Config

**Configuration**

- AMASTY EXTENSIONS
  - Mass Order Actions**
  - Demo Tooltips
  - Extended Order Grid
  - Order Notes and Files

**Mass Order Actions** Save Config

**General**

Enabled Actions

- Invoice
- Invoice > Capture
- Invoice > Ship
- Invoice > Capture > Ship
- Capture > Ship
- Capture
- Ship
- Change Status

▲ Press CTRL+mouse to select multiple values.

**Invoice**

Default 'Notify Customer'	Yes ▼	[STORE VIEW]
	▲ Will be pre-selected at the orders grid.	
Assign Status	Magento Default ▼	[STORE VIEW]
Print Invoices	Yes ▼	[STORE VIEW]

Please go to admin panel -> System -> Configuration -> Order Manager: Mass Actions to manage settings.

Here you can enable the order actions which should be available on the order grid.



Current Configuration Scope:  
Default Config

**Configuration**

- AMASTY EXTENSIONS
- Mass Order Actions**
- Demo Tooltips
- Extended Order Grid
- Order Notes and Files

### Mass Order Actions

[Save Config](#)

#### Invoice

Default 'Notify Customer'	<input type="text" value="Yes"/>	[STORE VIEW]
	▲ Will be pre-selected at the orders grid.	
Assign Status	<input type="text" value="Magento Default"/>	[STORE VIEW]
Print Invoices	<input type="text" value="Yes"/>	[STORE VIEW]

#### Capture

Default 'Notify Customer'	<input type="text" value="Yes"/>	[STORE VIEW]
	▲ Will be pre-selected at the orders grid.	
Assign Status	<input type="text" value="Magento Default"/>	[STORE VIEW]

For 'Invoice' and 'Capture' actions you can choose whether to notify customers of these actions. Also you can select which status should be assigned to the orders after the actions get applied.



# 5. Mass Actions: Settings

Save Config

## Mass Order Actions

Current Configuration Scope:  
Default Config

Configuration

AMASTY EXTENSIONS

Mass Order Actions

**Ship**

Add 'Shipping' Column to Order Grid: Yes [STORE VIEW]

Default 'Notify Customer': Yes [STORE VIEW]  
▲ Will be pre-selected at the orders grid.

Assign Status: Magento Default [STORE VIEW]

Default Carrier: Federal Express [STORE VIEW]  
▲ Will be pre-selected at the orders grid.

Default Title for Custom Carrier: [STORE VIEW]  
▲ Will be shown in the carriers dropdown for the 'custom' option, if the setting below is set to 'No'.

Show Custom Carrier Title at the Order Grid: Yes [STORE VIEW]

Set Carrier Title: No [STORE VIEW]  
▲ If Custom Carrier Title is not filled at the Order Grid.

For 'Ship' action you can choose if notifications should be sent to customers after the action gets applied to orders. In addition you can select the status which the orders should get.

If you use some custom carrier, which is not in Magento, you can specify its name here. It will be available for selection on the order grid.

It is possible to choose shipping carrier, which will be selected in the order grid dropdown by default.

If you set this option to 'Yes', then in case you forgot to specify the 'Title', you will see only the 'Carrier'. If you set this option to 'No', then in case you forgot to specify the 'Title', you can't see the 'Carrier'.

Carrier: DHL (Deprecated)

Title: My flat rate

Tracking Number:



## 6. Mass Actions: Tracking Information on the Grid

### Orders

Page 1 of 1 pages | View 20 per page | Total 18 records found | [New Order](#)

Select Visible | Unselect Visible | 0 items selected

	Shipping	Order #	Purchased From (Store)	Purchased On
Any				From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/>	Carrier: My Flat Rate Tracking Number: <input type="text"/>	100000019	Main Website Main Store English	Dec 23, 2011 6:11:53 AM
<input type="checkbox"/>	Carrier: <b>Federal Express</b> Tracking Number: <b>112HY3287-54</b>	100000018	Main Website Main Store English	Dec 23, 2011 6:10:45 AM
<input type="checkbox"/>	Carrier: My Flat Rate My Flat Rate DHL Federal Express United Parcel Service United States Postal Service	100000017	Main Website Main Store English	Dec 23, 2011 6:09:52 AM
<input type="checkbox"/>		16	Main Website Main Store	Dec 22, 2011 8:06:38 AM

On the order grid you can choose shipping carrier and specify tracking number. Please be aware that tracking information gets saved while you are applying 'Ship' action. It will not get saved if you don't apply the action.



## 7. Order flags: Assign flags on order grid

You can assign flags of different colors to the orders to define their priority. The flags assigned to the order can be seen in an additional column on the order grid.

 **Orders**

Page  of 1 pages | View  per page | Total 4 records found | [New Order RSS](#)

Select Visible | Unselect Visible | 0 items selected

	Shipping Method priority	Order Status Priority	
Any	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>		 On Hold	
<input type="checkbox"/>			

Hover over flag to see the flag comments. Click on the flag field to set a flag for an order.



## 8. Order flags: How to assign order flags to orders

Orders

Page 1 of 1 pages | View 20 per page | Total 8 records found | [New](#) [Export](#)

[Order RSS](#)

Select Visible | Unselect Visible | 0 items selected

	Flag ↓	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name
<input type="checkbox"/>	Any			From: <input type="text"/>		
		To: <input type="text"/>				
<input type="checkbox"/>		100000003	Main Website Main Store English			
<input type="checkbox"/>		100000006	Main Website Main Store English			
<input type="checkbox"/>			Main Website Main Store English			
<input type="checkbox"/>			Main Website Main Store English			
<input type="checkbox"/>			Main Website Main Store English			
<input type="checkbox"/>			Main Website Main Store English			
<input type="checkbox"/>			Main Website Main Store English			
<input type="checkbox"/>			Main Website Main Store English			
<input type="checkbox"/>		100000008	Main Website Main Store English	Nov 2, 2010 1:55:14 PM	test test	test test

### Flag For Order #100000008

Enter/modify comment for the flag you want to assign, and click "Set" button.

- NO FLAG**
- Urgent
- High Priority
- Medium
- Normal
- Suspended
- Immediate

Press 'Set' button next to the appropriate flag to assign it to the order. If necessary, edit the flag comment, the custom comment will be saved only for this order.

To remove a flag from an order, choose 'NO FLAG' option.



# 9. Order flags: How to create order flags

Existing order flags can be seen in admin panel -> Sales -> Order Flags. Five order flags are supplied with the extension. Feel free to replace them and/or add new ones.

Go to admin panel -> Sales -> Order Manager -> Flags -> Manage Flags to adjust existing flags and create new ones.

Click 'Add new flag' to create a new flag.

The screenshot shows the admin panel navigation bar with 'Sales' selected. A dropdown menu is open over the 'Flags' link, showing options: 'Flags', 'Columns', 'Notes and Files', and 'Manage Flags'. The 'Manage Flags' option is highlighted. Below the navigation bar, there is a 'Latest Messages' notification bar. The main content area shows a table of order flags with columns for 'Flag Icon', 'Transactions', 'Auto Apply on Order Status Changed to', 'Auto Apply on Order Shipping Method Chosen as', and 'Auto Apply on Order Payment Method Chosen as'. The table contains five rows of flags with different colors and statuses. There are also buttons for 'Add New Flag', 'Reset Filter', and 'Search'.

Flag Icon	Transactions	Auto Apply on Order Status Changed to	Auto Apply on Order Shipping Method Chosen as	Auto Apply on Order Payment Method Chosen as
	1	On Hold	Flat Rate, Free Shipping, Best Way, DHL (Deprecated), Federal Express, United Parcel Service, United States Postal Service, DHL,	
	90	Complete	Complete	
	80	Suspected Fraud	Suspected Fraud	
	70	suspended		
	60	Green		



## 9. Order flags: How to create order flags

Click 'Save Flag' once you enter all the flag data.

Back Reset Save Flag

### Flag Information

### New Flag

#### General Information

Automatic Apply

#### Flag Information

Alias *	<input type="text" value="White"/>
Icon Image	<input type="text" value="es\order flags\white.jpg"/> <input type="button" value="Browse..."/> <small>▲ JPG, PNG or GIF. 20x20 pixels strongly recommended. Images of different size will break design.</small>
Priority	<input type="text" value="40"/> <small>▲ Numeric value for internal use.</small>
Comments	<input type="text" value="Suspended"/>

Orders can be sorted based on flag priority.

The comments are visible on order grid, hover over flag to see them.



## 9. Order flags: How to create order flags

At the 'Automatic Apply' tab you can select statuses, to which the flag should apply automatically.

### Flag Information

### New Flag

Back

Reset

Save Flag

General Information

Automatic Apply

### Automatically Apply On Order Status Change

Order Status

Canceled

Closed

Complete

Suspected Fraud

On Hold

Payment Review

Pending

Pending Payment

Pending PayPal

Processing

▲ Set flag if order changes to one of selected statuses

This flag (white) will be applied automatically to orders, which get 'Suspected Fraud' or 'On Hold' status.



## 9. Order flags: How to create order flags

Also you can apply flag automatically to the orders which have certain shipping or payment method.

Order Shipping Method	<ul style="list-style-type: none"><li>Free Shipping</li><li>Best Way</li><li>DHL (Deprecated)</li><li>Federal Express</li><li>United Parcel Service</li><li>United States Postal Service</li><li>DHL</li><li>googlecheckout</li></ul>
	▲ Set flag if in the order used one of selected shipping methods
Order Payment Method	<ul style="list-style-type: none"><li>Credit Card (saved)</li><li>Check / Money order</li><li>No Payment Information Required</li><li>Purchase Order</li><li>Bank Transfer Payment</li><li>Cash On Delivery</li><li>Google Checkout</li><li>Credit Card (Authorize.net)</li><li>PayPal Express Checkout</li><li>PayPal Payments Pro</li></ul>
	▲ Set flag if in the order used one of selected payment methods
Column name	Order Status Priority
	▲ Assign to column



# 10. Order flags: How to create columns

Please go to admin panel --> Sales -> Order Manager -> Flags -> Columns to adjust the existing flag columns and create new ones.

Click "Add new column" to create a new flag column

## Columns



Page  of 1 pages | View  per page | Total 2 records found

Position ↑	Column Alias	Comments	Applied Flags
0	Shipping Method priority	shipping method	 Magenta,  Blue,  Green
1	Order Status Priority	order status	 Red,  Yellow



## 10. Order flags: How to create columns

### Column Information

General Information

Apply Flags

Choose the name of the column. It will be displayed on the order grid as a title of the column.

### New Column

Back Reset Save Column

#### Column Information

Alias \* Order Payment Method priority

Position 2

▲ Numeric value for internal use.

Comments payment method

Specify the position of the column on the order grid.



# 10. Order flags: How to create columns

## Column Information

General Information

Apply Flags

### New Column

Back

Reset

Save Column

#### Apply Flags To Column

Flags

Red  
Yellow  
Magenta  
Blue  
Green

Choose the flags you would like to use for this column.

▲ Set flags to column



# 11. Order flags: Apply flags to multiple orders

[Create New Order](#)

Export to:  [Export](#) [Reset Filter](#) [Search](#)

G.T. (Base)		G.T.		Action	
From:	<input type="text"/>	From:	<input type="text"/>		
To:	<input type="text"/>	To:	<input type="text"/>		
\$849.97				g	<a href="#">View</a>
\$485.00				osing	<a href="#">View</a>
\$156.94				g	<a href="#">View</a>
\$2,689.98		\$2,689.98		Pending	<a href="#">View</a>
\$434.98		\$434.98		Pending	<a href="#">View</a>

Actions

- Cancel
- Hold
- Unhold
- Print Invoices
- Print Packingslips
- Print Credit Memos
- Print All
- Print Shipping Labels
- 
- Apply "Red" Flag
- Apply "Yellow" Flag
- Apply "Magenta" Flag
- Apply "Blue" Flag
- Apply "Green" Flag
- Remove Flag
-

**You can also apply flags to multiple orders by using the 'apply flag' actions on the order grid**



## 12. Notes and files: Settings

Extension settings are in admin panel -> System -> Configuration -> Order Memos And Attachments

If 'Collapsed by default' option is set to 'Yes', the block with the additional fields will be folded on the order view page by default (of course, you can unfold it).

Current Configuration Scope:  
Default Config    
[Manage Stores](#)

**Configuration**

- AMASTY EXTENSIONS
- General
- Order Manager: Extended Grid
- Order Manager: Notes and Files**
- Order Manager: Mass Actions

### Order Manager: Notes and Files

#### General Settings

- |  |   |          |
|--|---|----------|
| Collapsed by default   | <input type="text" value="Yes"/> <input type="button" value="⌵"/> | [GLOBAL] |
| ▲ This sets how to show memos and attachments block on the order view page   |   |          |
| Update 'updated_at' order field  | <input type="text" value="Yes"/> <input type="button" value="⌵"/> | [GLOBAL] |
| ▲ If set to 'Yes', the 'updated_at' order field will be set to the current date/time when order memo or attachment field value added or updated for particular order |   |          |
| Use HTML5 for files upload   | <input type="text" value="Yes"/> <input type="button" value="⌵"/> | [GLOBAL] |
| ▲ Allow to use drag'n'drop and multiple files upload   |   |          |

If this option is set to 'Yes', date in 'updated\_at' field for orders gets updated each time, when you modify an order memo or attachment.

Set this option to 'Yes' if you want to use HTML5 for files upload.



# 13. Notes and files: How to create fields

Please go to admin panel -> Sales -> Order Manager -> Notes and Files

To create a field for order memos/attachments (or some other purpose) please press 'Add New Field' button.

The screenshot shows the Order Manager interface. The 'System' menu is open, and 'Notes and Files' is highlighted. The 'Add New Field' button is visible in the top right corner. Below the menu, a table lists existing fields with their aliases, labels, types, and statuses.

Field Alias	Label	Field Type	Display To Customer	Backend Status	Frontend Status	Show On Grid	Enabled
actual_date	Actual Date	Date	Allow To Edit	Complete, Pending	Complete	Yes	Yes
comments	Comments	Text Area	Allow To Edit	All	All	No	Yes
customer_security_id	Customer Security ID	Multiple Files Upload	Allow To Edit	All	All	Yes	Yes
payment_order	Payment Order	Single File Upload	Allow To Edit	All	All	No	Yes
sales_person	Sales Person	Dropdown	Allow To Edit	All	All	Yes	Yes



## 13. Notes and files: How to create fields

**Field Configuration**

**New Field** Back Reset Save Field

**General Information**

**Order Status Visibility**

**Attachment Field Details**

Alias \*   
▲ Please use lowercase letters a-z and \_ symbols only.

Label \*

Field Type   
Text Field  
Text Area  
Single File Upload  
Multiple Files Upload  
**Date**  
Dropdown

Default Value

Display To Customer

Enabled

Show On Order Grid   
▲ Does not work for "file" attribute types.

You can indicate any alias (it is used only in the code).

There are six field types available: text field, text area, dropdown, date, single file upload, multiple files upload (it will be possible to upload as many files as you need for one field).



# 13. Notes and files: How to create fields

## Field Configuration

General Information 

Order Status Visibility 

## New Field

 Back

Reset

 Save Field

### Attachment Field Details

Alias *	<input type="text" value="memo"/> <small>▲ Please use lowercase letters a-z and _ symbols only.</small>
Label *	<input type="text" value="Order memo"/>
Field Type	<input type="text" value="Text Field"/>
Default Value	<input type="text" value="Put invoice inside the package"/> <small>▲ Will be automatically assigned to any new order placed.</small>
Display To Customer	<input type="text" value="Do Not Display"/>
Enabled	<input type="text" value="View Only"/>
Show On Order Grid	<input type="text" value="Allow To Edit"/> <small>▲ Does not work for "file" attribute types.</small>

You can specify default value for 'text field', 'text area', and 'dropdown' field types. This value will be assigned to all orders by default.

You have full control of display of the fields to customers:

1. 'Do Not Display' option – the field will not be displayed to customers.
2. 'View Only' – customers will be able only to see the field.
3. 'Allow To Edit' – customers will be both able to see and to edit the field values.



## 13. Notes and files: How to create fields

**Field Configuration**

**New Field** Back Reset Save Field

**General Information**

**Order Status Visibility**

**Attachment Field Details**

Alias *	<input type="text" value="memo"/> <small>▲ Please use lowercase letters a-z and _ symbols only.</small>
Label *	<input type="text" value="Order memo"/>
Field Type	<input type="text" value="Text Field"/>
Default Value	<input type="text" value="Put invoice inside the package"/> <small>▲ Will be automatically assigned to any new order placed.</small>
Display To Customer	<input type="text" value="View Only"/>
Enabled	<input type="text" value="Yes"/>
Show On Order Grid	<input type="text" value="Yes"/> <small>▲ Does not work for "file" attribute types.</small>

It is possible to enable and disable the fields.

You can show the fields on order list page. This will work only for 'text field', 'text area', 'date' and 'dropdown' field types.



# 14. Notes and files: Select order statuses for fields display

## Field Configuration

- General Information
- Order Status Visibility**

At the 'Order Status Visibility' tab you can select order statuses. The fields will be displayed only for orders with the statuses you select here.

You can have a separate selection of statuses for frontend (customer) and backend (admin) order displays.

## New Field

Back Reset Save Field

### Order Status Visibility

Order Status For Backend

- All
- Canceled
- Closed
- Complete**
- Suspected Fraud
- On Hold
- Payment Review
- Pending**
- Pending Payment
- Pending PayPal

▲ Display field only if order status is one of the selected

Order Status For Frontend

- All
- Canceled
- Closed
- Complete**
- Suspected Fraud
- On Hold
- Payment Review
- Pending
- Pending Payment
- Pending PayPal

▲ Display field only if order status is one of the selected



# 15. Notes and files: Fill in fields on order page

 **Order # 100000004 | Apr 21, 2011 9:01:01 AM**

[Back](#) [Edit](#) [Cancel](#) [Send Email](#) [Hold](#) [Invoice](#) [Ship](#) [Reorder](#)

Order # 100000004 (the order confirmation email was sent)	
Order Date	Apr 21, 2011 9:01:01 AM
Order Status	Pending
Main Website	
Main Store	
English	
Placed from	87.252.227.56

On the order page you will find a block called 'Order Attachments'. All the fields that you have created will be displayed in this block.

Account Information	
Customer Name	<a href="#">Nancy Hilarison</a>
Email	<a href="mailto:nancy@example.com">nancy@example.com</a>
Customer Group	General

You can also fold and unfold the attachments block.

Order Attachments	
Screens 	<a href="#">address.png</a> <a href="#">actions.png</a>
Memo 	What a great customer
Sales person 	Jack Black
id 	
Actual Shipping date 	<input type="text"/> 
	<a href="#">Save</a> <a href="#">Cancel</a>

To upload a file or fill in a field please click the 'pencil' icon.



## 16. Notes and files: Fields on order grid

s found | [New Order RSS](#) Export to Create New Order Set Filter Search Submit

You can display the fields (except upload types) on order grid. Also you can filter and sort orders by these fields.

Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Sales person	Actual Shipping date	Action
		From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	Jack Black	From: <input type="text"/> 05/9/11 To: <input type="text"/> 05/12/11	
Nancy Hilarison	Nancy Hilarison	\$739.98	\$739.98	Closed	Jack Black	May 11, 2011	<a href="#">View</a>
Nancy Hilarison	Nancy Hilarison	\$321.94	\$321.94	Pending	Jack Black	May 10, 2011	<a href="#">View</a>



## 17. Notes and files: Fields in customer's account

### Billing Address

test test  
test  
test, Alaska, test  
United States  
T: test

### Payment Method

Check / Money order

Here's an example of how the fields are displayed in customer's account. Customers can edit the field values if allowed by admin.

### Order Attachments

Payment Order 

Comments

order comments here.

Notification Date 

Feb 21, 2012

### Items Ordered

Product Name	SKU	Price	Qty	Subtotal
Orange	O1	\$40.00	Ordered: 1	\$40.00
			Subtotal	\$40.00
			Shipping & Handling	\$5.00
			<b>Grand Total</b>	<b>\$45.00</b>



## 18. Notes and files: Add the extension data to email templates

You can also include the extension data in email templates. For this please add variables of the kind to the templates:

```
{{var order.memo('some_field')}}
```

Replace `some_field` with the alias of the field which you will use in emails.



# Thank you!

Should you have any questions or feature suggestions, please contact us at:

<http://amasty.com/contacts/>

Your feedback is absolutely welcome!



User Guide: [Order Manager Toolkit](#)

Support: <http://amasty.com/contacts>