



Extension Module (XMOD): Batch Order Management (BOM)

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What is an XMOD?

A XMOD is an extension module developed by Kryptronic for our popular ClickCartPro and EuropaCart e-commerce software.

XMODs are developed to the highest standards to ensure proper and complete functionality using core components and Kryptronic coding techniques to ensure a stable, secure and optimized module.

What is Batch Order Management (BOM) for ClickCartPro and EuropaCart?

The Batch Order Management (BOM) XMOD for ClickCartPro and EuropaCart is an advanced module, which provides a battery of new order-specific functions which speed up processing of orders, increase customer satisfaction through enhanced communication, and help convert failed and abandoned orders into sales.

This extension module works perfectly on all ClickCartPro and EuropaCart 8.0 and later software installations, and installs easily using the Kryptronic Software Installer without any impact to any other software files.

- This module provides a Batch Order Management (BOM) interface, which allows users to manage orders in a batch format (multiple orders at a time). This interface allows users to update Order Statuses and Order Item Statuses, enter single or multiple Package Tracking Numbers for different carriers, send pre-formatted emails to customers, run Post-Order Update functions, and print single or multiple Invoices, Pack Lists and/or Labels for delivery addresses and order items.
- Order Status Code management is available, which allows you to easily add and manage custom status codes for orders, and to update existing codes. Additionally, you can change the colors used for presenting different order statuses in Batch Order Management (BOM) to get a custom look.
- Save failed and abandoned orders by converting them into sales using Batch Order Management (BOM) to email customers, and convert orders from Pending Payment to Completed status.

Requirements

This module may be installed on all versions of ClickCartPro or EuropaCart 8.0 or later, without updating to the latest version of the software. Installation of this module does not alter any other modules, or software files, so it is safe to use the Kryptontronic Software Installer to install this module on sites with custom modifications.

Usage

Access Batch Order Management (BOM) functions under the menu:

Store > Extension Module: Batch Order Management (BOM)

There are two options presented there, one for Batch Order Management (BOM), which allows you to manage orders in a batch format, and one for Order Status Codes, which allows you to manage order status codes.

Information on using Batch Order Management (BOM) to save failed and abandoned orders is presented in this section.

Using Batch Order Management (BOM)

Access Batch Order Management (BOM) by navigating to:

Store > Extension Module: Batch Order Management (BOM) > Batch Order Management (BOM)

Presented in the order listing are all orders that have statuses other than Complete (C) and Cancelled (X). To remove an order from the listing, change it's status to either Complete (C) or Cancelled (X).

Several options are available for each order. Make changes to all orders listed, then click the 'Process Updates' button to process all changes. The options available are:

1. Update, Delete, or Manage Items in the order. These options provide links the standard software interfaces for updating and deleting orders, and managing order items.
2. Print a single Invoice or Packing list for an order. These options provide links to print a single invoice, or a packing list for an order.
3. Update Order Status and Item Shipping Status for orders and order items. Simply select the new status from the list for the order, or one or more items. To make Batch Order Management (BOM) more efficient, if an order is marked as Complete (C), all shipped items in that order will automatically be updated to a Shipped status.
4. Add Tracking Numbers for UPS, USPS and FedEx to the order.

Advanced Users: If there are any custom fields in the 'ecom_orders' table, which begin with the string 'track', those fields will be counted as tracking number fields. To add a field for Royal Mail tracking numbers, simply access *System > Database > Raw Database Admin* and add a column to the 'ecom_orders' table named 'trackroyalmail'. The new field will be made available in Batch Order Management (BOM) and will be displayed as 'ROYALMAIL Tracking Numbers'.

5. Send an Email to the customer. Choose from a listing of canned mail messages:

Order Complete: Sends the customer a message stating that their order has been completed, and provides all tracking information and statuses for the order, and items in the order.

Order Incomplete: Sends the customer a message that their order was not completed, and provides information on how to contact the site to process the order. Also provides a copy of the order for reference.

Order Partially Shipped: Sends the customer a message stating that their order has been partially shipped, and provides all tracking information and statuses for the order, and items in the order.

Order Waiting For Stock: Sends the customer a message stating that their order is waiting for stock, and provides all tracking information and statuses for the order, and items in the order.

Advanced Users: You can add your own custom mail messages to this listing by basing them on the mail messages already provided. To do this, access the *System > Database > Raw Database Admin* function, and choose to Browse the 'core_mail' table. Choose to clone a mail message which is similar to the one you wish to create, and ensure that the 'id' you use begins with 'ecom.xmodbom'. After you've added your new mail message, you can edit it using the *System > Mail > Mail Messages* function.

6. Choose the number of Invoices and Pack Lists to print for each order. You may print multiple invoices and pack lists for each order by simply entering the number you want to print in the appropriate field.
7. Choose the number of Labels to print for each Delivery Address present in an order. You may print multiple delivery address labels for an address by simply entering the number you want to print for that address. Labels are printed using page-breaks and simple XHTML/CSS. They are formatted to be printed on a 4x4 label printer.
8. Choose the number of Labels to print for each Item present in an order. You may print multiple item labels for an item by simply entering the number you want to print for that item. Labels are printed using page-breaks and simple XHTML/CSS. They are formatted to be printed on a 4x4 label printer.

9. Perform Post-Order Updates for orders. All post-order updates are available through Batch Order Management (BOM), including custom post-order updates installed by other XMODs. The stock post-order updates included in the software are:

Update Affiliate Commissions: Updates affiliate commissions for an order.

Run Custom Processing Functions: Runs custom processing functions for an order.

Update Discount Code Information: Updates discount code status for an order.

Update Product and Product Option Inventory: Updates declining balance inventory for items in an order.

Send Customer Mail Confirmation Message: Send an order confirmation email message to a customer for an order.

Send Internal Mail Confirmation Message(s): Send an order confirmation email message to the internal order email address for an order.

Send Dropshipper Mail Confirmation Message(s): Send an order confirmation email message to a dropshipper for an order.

Managing Order Status Codes

Manage Order Status Codes by navigating to:

Store > Extension Module: Batch Order Management (BOM) > Order Status Codes

This function allows you to easily update the default order status codes that come with the software, and to add, update and delete new custom order status codes for use throughout the software.

Batch Order Management (BOM) presents different types of orders (based on their order status codes) in different colors. You can edit those colors using the Order Status Codes function in order to give your Batch Order Management (BOM) a custom look.

Several new order status codes are created when the Batch Order Management (BOM) extension module is installed. These new order status codes are:

1. Pending Customer Emailed: This code should be used after attempting to convert Pending Payment (failed, abandoned) orders into paid orders by sending an Incomplete Order mail message to the customer.
2. Waiting on Customer Response: This code should be used if the order cannot be processed until the customer has responded, and the customer has been contacted.
3. Waiting For Stock: This code should be used when an order is waiting for stock. When updating an order to this status, send a Waiting For Stock mail message to the customer.

Save Failed/Abandoned Orders

With Batch Order Management (BOM) you can save orders that would have been otherwise lost. Orders are created in the software with a Pending Payment order status. Orders remain at that status until they are successfully processed.

Orders, which appear in the Batch Order Management (BOM) function with a Pending Payment order status, may be converted into sales, if you follow the steps below:

1. Access Batch Order Management (BOM) and identify an order with a Pending Payment status, which you would like to attempt to convert into a sale.
2. Change the Order Status to 'Pending Customer Emailed', and select 'Order Incomplete' from the Send Email listing.
3. If the customer contacts you regarding the order wishing to process it, accept payment from the customer using whichever method you use to process non-Internet orders. Next, access Batch Order Management (BOM), identify the order, and set it's Order Status to 'Pending Shipment', or 'Complete', depending on whether or not there are shipped items in the order. Check the boxes next to all of the Post-Order Update fields and submit your updates, then continue processing the order as you would any other.
4. If the customer does not contact you to process the order, access Batch Order Management (BOM), identify the order, and set it's Order Status to 'Cancelled' to remove it from the listing.

Installation

This module is installed using the Kryptontronic Software Installer. Access your installer via a URL similar to:

<http://www.yourdomain.com/installer.php>

Installation Without Update

In order to install this module without updating any other software, follow these steps:

- Access your installer.php script and login. Submit through steps 1-5 without making changes to your installation configuration information.
- On Step 6 (PEAR Installation), choose 'No, do not reinstall/update PEAR modules'.
- Submit through steps 7-11 without making changes to your installation configuration information.
- On Step 12 (Component & Module Installation), choose 'Yes, reinstall/update components and modules' and check the box 'Only install new components and modules'. Leave the 'Overwrite all files' checkbox EMPTY.
- On Step 13 (Database Reload), choose 'Reload with recently changed definition files only'. It is your option whether you choose to auto-submit the steps or confirm each one. If any database definition files have been updated, only those files that have changed will be updated. Do not worry about losing data or the installer overwriting your data during a database reload. The installer is smart enough not to do that to you.

Installation With Update

In order to install this module and update all software at the same time, check the Kryptontronic Central Server news service within your management interface for update instructions. Many updates require manual changes.

Provided no manual changes are necessary for your update, follow these steps:

- Access your installer.php script and login. Submit through steps 1-5 without making changes to your installation configuration information.
- On Step 6 (PEAR Installation), choose 'Yes, reinstall/update PEAR modules'.
- On Step 7 (Core Installation), choose 'Yes, reinstall/update the system component'. Leave the 'Overwrite all files' checkbox EMPTY.

- Submit through steps 8-11 without making changes to your installation configuration information.
- On Step 12 (Component & Module Installation), choose 'Yes, reinstall/update components and modules'. Leave the 'Overwrite all files' and 'Only install new components and modules' checkboxes EMPTY.
- On Step 13 (Database Reload), choose 'Reload with recently changed definition files only'. It is your option whether you choose to auto-submit the steps or confirm each one. If any database definition files have been updated, only those files that have changed will be updated. Do not worry about losing data or the installer overwriting your data during a database reload. The installer is smart enough not to do that to you.

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Module Development

This module was developed by Nick Hendler, of Kryptontronic, Inc.

Nick Hendler has been the chief software developer for Kryptontronic since it's inception in 1999.

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