Order Workflow

Plugin
for nopCommerce

Plugin Documentation

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This plugin **is** used to customise the process for purchase, payment, packing and shipping for Products **using an Order Workflow**.

An order pipeline represents a set of processes that are unique to an organisation.

A pipeline is created when an order passes through a series transactions and statuses from one process to the next process based on conditions and user input. This order pipeline process is called an order workflow when represented in a computer system.

The plugin utilises a **set** of new Admin order management pages which have been specifically created to manage and oversee each workflow process. In the base pipeline there are 3 workflow phases**:**

- Checking
- Processing
- Delivery.

Other phases can be added as required.

A number of function buttons are added to each admin order workflow page. Staff members are each assigned to manage orders according to their roll and responsibility in one of each the phases using the respective Admin Order Page.

Features

Product Type Definition to Define Workflow Orders

- Management of Orders in the Workflow through customer **designed** Admin Pages
- Approval **Process** for Orders to be Checked before confirmed with the customer
- Page Authorisation Permission to Control Access
- Associate and Control Display of Checkout Attributes for Order Workflow Products
- Customised Email Notifications with PDF **Attachment**
- Quick installation - Ready to upload package provided
- Easy Configuration - The install sets up sample data which shows the standard configurations

Philosophy of Use

By separating out each order workflow phase and only displaying orders in that phase on a custom designed Order Admin page it allows staff to concentrate on being more productive as they are only responsible for carryout out tasks in their currently role assisted by the functions associated with each particular order page.

This way of managing work has the benefit that each staff role associated with the overall workflow process can productively action orders through the pipeline. When orders are managed in this order workflow it increases the efficiency of each step of the process, allowing each staff member to focus on just their current role as part of the overall process.

Another benefit is that roles and access to privacy and security data can be controlled by account and user permission which can be setup to provide access to particular Admin Order pages.

Order Status for Workflow

The system uses the three Order statuses to determine which phase or stage an order is in the Workflow

	Ordered	Approved	Process	Delivery	Transit	Completed
Payment Status	Pending	Pending	Paid / Auth	Paid	Paid	Paid
Shipping Status	Not Shipped	Not Shipped	Not Shipped	Partially Shipped	Shipped	Delivered
Order Status	Pending	Processing	Processing	Processing	Processing	Completed

For example is the Order has Payment Status Paid, Order Status Processing and is Not Shipping then it is in the **Process** stage and will be displayed on the process view.

Checkout Attributes

The plugin has the ability to control which Check Attributes are displayed for an Order Workflow Product.

Only the checkout attributes that are defined in the configuration will be displayed for Order Workflow Products which the product is added to the checkout.

For example: The default configuration enables the Gift-Wrapping Checkout Attribute to be displayed.

No other checkout attributes will be displayed in the case.

This setting does not affect any products that are not order workflow type

Zero Value Products

The plugin has the ability to control which Check Attributes are displayed for a zero-value products .i.e. a product which has a price equal to zero.

Only the checkout attributes that are defined in the configuration will be displayed for Zero Value Products when the product is added to the checkout.

No other checkout attributes will be displayed in the case.

Customer Account Orders

If an order has been Approved (See below) A customer can also return to the website and open the order and Click "Make Payment"

Make Payment

The payment method must support Deferred Payment. When the customer clicks the link in the above email, it takes them to the website to make payment they can select the payment method

- o The list of payment methods available is defined in the settings

Custom Administration

A new series of menu options are added
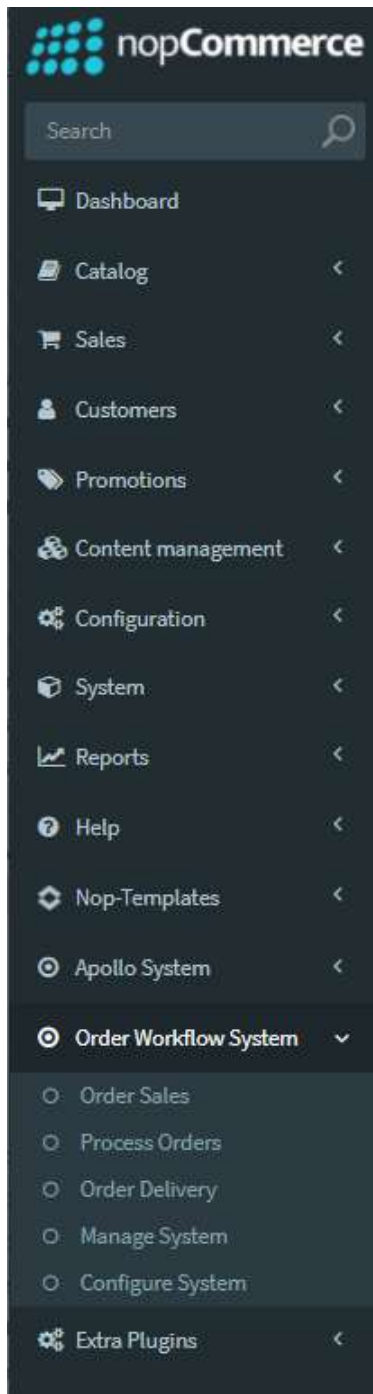
Order Workflow System

A series of pages have been created to specifically manage OrderWorkflow defined products through a process.

OrderWorkflow Processing

The various OrderWorkflow Pages can be used buy different staff members

One staff member could use a page for Checking – i.e. going through each order through checking and changing any details / price and approving the order

Another staff member can use the Processing page for preparing and processing product orders

Another staff member may use the page for Packing the orders and getting them ready to ship.

In this way the worker is only interested in the current role and moving the items onto the next process list ensuring they are more productive dealing with each order

System Permissions

There are four Permissions which can be assigned to the various pages

1. Manage Plugin – Standard nopCommerce ACL for access to manage the plugin
2. Office (Manage Orders) – Standard nopCommerce ACL for access to Manage Orders (Check status of Order, Mark as Paid and Cancel Order)
3. Operator – Can access the Processing Functions
4. Manager – Can access the Manage Reports, etc

All other functions for standard nopCommerce orders can be used including Impersonate the User

Order Sales

Once an order has been created the order will appear in the Sales Checking / Processing page

	Order	Name	Warehouse	Product Details	Quantity	Customer	Total	Status	Payment Date	Payment Method	Shipment	View
☐	65	Adobe Photoshop CS4			1	Test New Zealand (test@test.com)	$75.00	Pending	Not Paid	Check / Money Order	Add	⚙ View

Order Sales — Orders Report ▼ — ⬇ Export ▼ — Set All Orders as Paid — Set All Orders as Approved

Search Product Name [ ] Payment Method ❓ All ⌄

Order Created Start Date ❓ [ ] 🗓 Order by Name ❓ ☐

Order Created End Date ❓ [ ] 🗓 Order Not Paid ❓ ☐

🔍 Search

◀ 1 ▶   Show 15 ⬍ items   1-1 of 1 items ⟳

Once the order has been checked and is ready for the next stage then select the orders and click the **Set Order as Approved** button which will move the orders to the next stage.

For where orders are manually Paid or you need to force an order to be Paid then select the orders and click the **Set All Orders** as Paid button

One an order has been set to approved the customer will receive and email requesting to make payment

Farmacie Desenzani

Hello tet name,

Thanks for buying from Farmacie Desenzani. Below is the summary of the order.

Your order has ben approved for payment - To make payment click this link Make Payment

Order Number: 25
Order Details: http://farmaciedesenzani.com/orderdetails/25
Date Ordered: Friday, November 13, 2020

Billing Address
Name and
Address

Shipping Address

PIAZZA FRETTE 25
SOVICO 20845
Italy

Shipping Method: Pickup at Farmacia Sovico

Name	Price	Quantity	Total
BACTRIM*16 cpr 160 mg + 800 mg SKU: 021978046	€3.72	2	€7.44
ABILIFY*28 cpr 10 mg SKU: 036582029	€42.74	1	€42.74
	Il carrello contiene prodotti con ricetta, scegliere se inserire il codice ricetta elettronica o caricarne la foto: Codice Ricetta Online Codice ricetta / note: Testing		
		Sub-Total:	€50.18
		Shipping:	€0.00
		Tax:	€0.00
		Order Total:	€50.18

The email contains the link to make payment: for example

https://yourwebsite.com/plugins/MultiSafepay/deferredpayment/7080

To use other payment methods edit the email template

Process Orders

Once an order has been paid it will appear in the Order Processing Page

Process Order

This page allows the staff member to check the order details and process and pack the requirements.

Once the order has been processed and is ready for the next stage then select the orders and click the **Set Order as Processed** button which will move the orders to the next stage.

Or if there is a problem with the order, they can return it to **Checking** by clicking the **Return Orders to Check** button

Order Delivery

Once an order has been processed a shipment will automatically be made and the order will appear in the Order Delivery Page

At this point the order can be either Pick-Up in store or Ready for Shipping.

If there is a problem with the order it can be return to Process.

Then for Pickup desk operator can go to the shipment and enter the details regards pickup

Alternatively, when a Shipment has been made with a shipping company the details can be entered

Once the order has been processed and is ready for the next stage then select the orders and click the **Set Order in Transit** button which will move the orders to the next stage.

Or if there is a problem with the order, they can return it to **Processing** by clicking the **Return Orders to Process** button

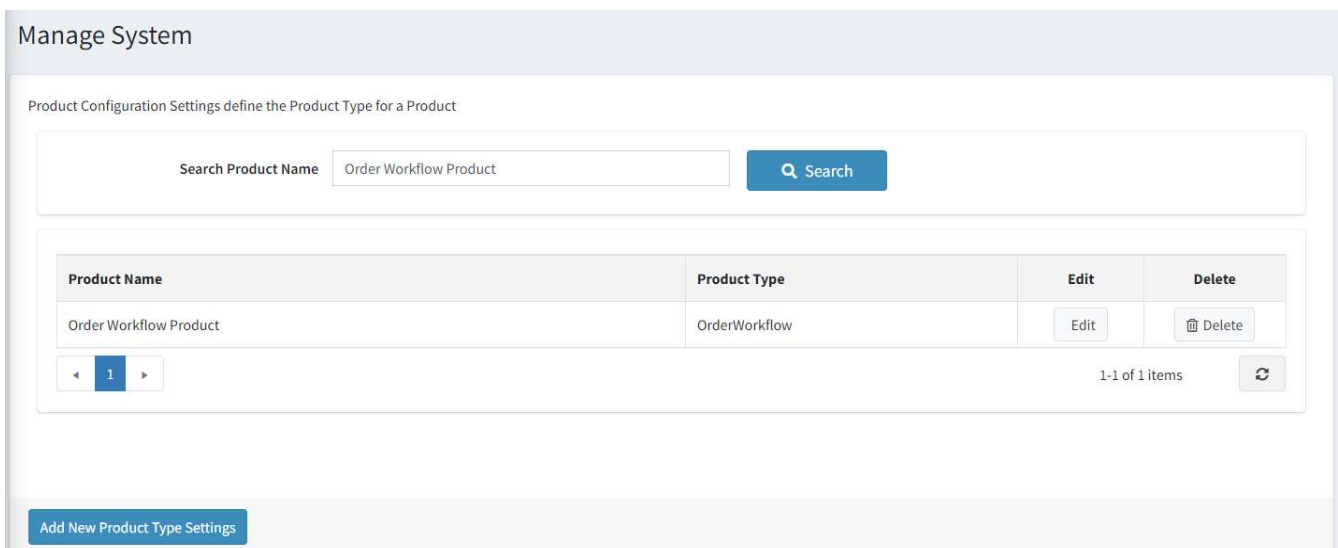## Custom Reports and Export to Excel

Each page has a button array
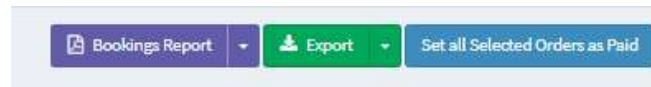
This allows the currently displayed orders to be either exported to excel or printed in a PDF

Configure a Product as an Order Workflow Type

In addition to setup the product up with the correct type and template, etc. We also need to define the Product Configuration.

Manage Configuration

The demonstration product configuration is setup as part of the install.

For all new products you need to create a record in the Product Configuration. To create a new record, click "Add New Product Configuration"

Add New Product Configuration

Enter the Record Type is selected as Configuration.

Then enter select the Apollo Product and Apollo Product Type

Defining a Product as an Order Workflow type will then enable the specific functions associated with that type

Message Template

There is a custom message template which is used for the email that is sent when an order is Approved

nopCommerce Administration

Installing the Plugin

The Limepay package supplied can be uploaded and installed using the "Upload plugin or theme" button on the Configuration > plugins page.

> Refer to Then the installation of the plugin follows the standard nopCommerce procedure.
> See https://docs.nopcommerce.com/user-guide/configuring/system/plugins.html

Alternatively, you can manually install the plugin:

1. Copy the Plugin to the correct directory
2. Restart the Application – Click the Icon in the top

Once installed the you can configure the plugin.

Configure Settings

The settings for the plugin can be set using the configure page.

Plugin Enabled

Click the Enable Checkbox to Enable the Plugin Functionality

OrderWorkflow System Enabled

Click this Checkbox to Enable the Plugin Order Workflow

Checkout Attributes

This is a list of checkout attributes that are displayed when and order workflow product is in the shopping cart

Zero Value Checkout Attributes

This is a list of checkout attributes that are displayed when an order workflow product has zero value price in the shopping cart

Attachment Files Directory Location

Enter the message template default file attachment directory

- o For example, the uploaded directory can be used i.e. ~/wwwroot/images/uploaded/

Delete Tables on Uninstall

This setting is used if the plugin needs to be uninstalled.

When un-installing the plugin, you can decide if you want the tables and all existing product data to be deleted or you want to keep the tables and existing data

To delete the tables and the configuration click the Checkbox

Warning: Only select the **Delete Tables on Uninstall** option when you no longer plan to use the plugin or you want to clear all existing data, remove tables and start again after a reinstall.

Delete Configuration on Uninstall

This setting is used if the plugin needs to be uninstalled and you will not be reinstalling and want to delete the system configuration

- When un-installing the plugin, you can decide if you want delete or keep the existing configuration

Demonstration Licence Keys

When the plugin is first installed it will be setup in demonstration mode allowing all product types to be enabled and viewed. The demo keys will only allow the plugin to operate for 14 days after which they will expire.

Purchased Licence Keys

When you first install the plugin Demonstration keys will be automatically generated. The plugin can be operated in demo mode for 14 days. The purchase licence keys will be provided via email normally within 1 day after purchase. The purchase licence keys can then be entered as follows:

Public Key

This is the plugin licence public key provided. When you first install the plugin a Demonstration key will be saved. Change this value to the Public key suppled in the email when received.

Private Key

This is the plugin licence public key provided. When you first install the plugin a Demonstration key will be saved. Change this value to the Private key suppled in the email when received.

Click this checkbox to enabled the marketing features which will then be visible on the website. See details below.

*After entering the settings click **Save.***

Demo Website

To view the plugin operation or refer to the demo websites

http://v45demo.selectsystems.com.au/

Contact Us

If you have any more questions or would like to make suggestions on how to make the plugin operations more functional please email: sales@selectsystems.com.au