



# Purchase Order Management

Magento Module By:



User Guide - 9/10/2017

## Section 1:

### Installation:

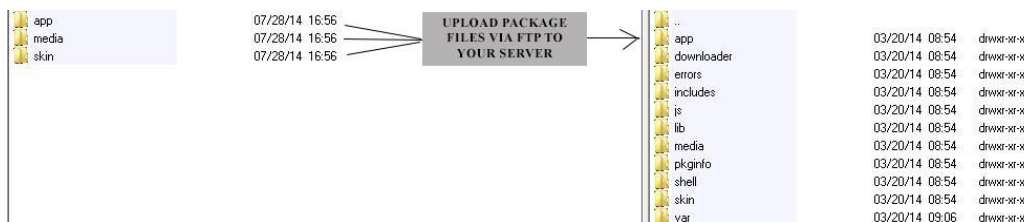
#### 1) Turn off Magento's Compilation Mode

- Check to see if Magento's compilation mode has been enabled. If it has, it's vital to turn it off before installing an extension or making any code changes (go to System > Tools > Compilation).

#### 2) Turn on Magento's Cache

- Turn on Magento's configuration cache – this will prevent Magento from trying to install the new extension too early. If the extension needs to make any database changes, triggering the installation too early could miss some database changes and create errors which are difficult to fix later on.

3) Install/copy files from .zip onto your hosting account (via FTP). Please backup any files that will be replaced if needed.



4) After files were uploaded change the permissions on the following folder media/orderPdf to 777 permissions.

#### 5) Refresh Magento's Cache

- Refreshing the Magento cache allows Magento to register the addition of the new extension and to run any necessary installation routines. Alternatively, turning off the cache will have the same effect.

- Logout/Login to your magento admin panel and refresh/flush your cache.

## Section 2:

### Settings:

Via your Magento Admin panel (backend) and go to: System > Configuration > Sales > Payment Methods > Purchase Orders:

Sort Order	<input type="text"/>	[WEBSITE]
Default Limit	<input type="text" value="100000"/>	[STORE VIEW]
Default Net Terms	<input type="text" value="30"/>	[STORE VIEW]
Limit Exceeded Message	<input type="text" value="Sorry, you have surpassed your PO LIMIT"/>	[STORE VIEW]
Display Limit Exceeded Error Message in Payment Method at Checkout	<input type="text" value="No"/>	[STORE VIEW]
PO Order Email Template	<input type="text" value="Order Default Template"/>	[STORE VIEW]
PO Order Guest Email Template	<input type="text" value="Order Default Template"/>	[STORE VIEW]
Send PO Invoice attached to Order Confirmation	<input type="text" value="Yes"/>	[STORE VIEW]
Remit Payment To	<div style="border: 1px solid #ccc; height: 50px;"></div>	[WEBSITE]
Paid Icon	<input type="button" value="Browse..."/> No file selected. paid.png <input type="checkbox"/> Delete File * Recommend using the size: 553 x 333 pixels	[GLOBAL]
Online Capture Methods	<div style="border: 1px solid #ccc; padding: 2px;"><ul style="list-style-type: none"><li>Bank Account (eCheck)</li><li>Credit Card (Authorize.net)</li><li><b>Credit Card (Visa, MasterCard, Discover Card)</b></li><li>Credit Card Direct Post (Authorize.net)</li><li>Google Checkout</li><li><b>Moneybookers</b></li><li>All Polish Banks</li><li>CartaSi</li><li>Carte Bleue</li><li>Credit Card / Visa, Mastercard, AMEX, JCB, D</li><li>Dankort</li></ul></div>	[GLOBAL]
Store Name	<input type="text" value="INVOICE"/>	[STORE VIEW]
Memo	<div style="border: 1px solid #ccc; height: 50px;"></div>	[STORE VIEW]
Enable Frontend Capture	<input type="text" value="Yes"/>	[STORE VIEW]
Allow Frontend Capture for Customer Groups	<div style="border: 1px solid #ccc; padding: 2px;"><ul style="list-style-type: none"><li><b>General</b></li><li>Dealer</li><li>Retailer</li><li>CrystalBasin</li><li>DropShip</li><li>Amazon Vendor USA</li><li>Amazon Vendor Canada</li><li>Amazon Vendor UK</li><li>eBay.com</li><li>eBay.ca</li></ul></div>	[WEBSITE]
Frontend Online Capture Methods	<div style="border: 1px solid #ccc; padding: 2px;"><ul style="list-style-type: none"><li>Bank Account (eCheck)</li><li>Credit Card (Authorize.net)</li><li><b>Credit Card (Visa, MasterCard, Discover Card)</b></li><li>Credit Card Direct Post (Authorize.net)</li><li><b>Moneybookers</b></li><li>All Polish Banks</li><li>CartaSi</li><li>Carte Bleue</li><li>Credit Card / Visa, Mastercard, AMEX, JCB, D</li><li>Dankort</li><li>FPD Online-Überweisung</li></ul></div>	[GLOBAL]

*Shows on invoice header.*

*Customers Groups allowed to pay invoices on frontend via account.*

*Allows users to pay via their accounts on frontend.*

## Settings (continued):

The module adds additional functionality to the native Purchase Order Payment Method, including:

- Default Limit – If set, this creates a default PO Limit for new customers. If empty, no customers will get a PO Limit unless applied directly via their Customer Account in Magento.
- Default Net Terms - If set, this creates a default PO Net Terms for new customers. If empty, no customers will get a PO Limit unless applied directly via their Customer Account in Magento.
- Limit Exceeded Message – Will be visible if user tries to purchase and total goes over their available PO Limit that’s available to them.
- Display Limit Exceeded Error Message in Payment Method at Checkout – If Yes, will display “Purchase Order” payment method at checkout but will include error message if not enough “PO Credit/Limit” available. If set to NO, it’ll hide this payment method if not enough PO Credit/Limit available.
- PO Order Email Template – Select email template as needed.
- PO Order Guest Email Template – Select email template as needed for guest customers.
- Send PO Invoice Attached To Order Confirmation: If yes, user will get a PO Invoice attached to the Order Confirmation email.
- Remit Payment To: This will be the remit to address customers will send checks/payments to.

- Paid Icon – If you want to change the default paid icon from the Paid Invoices, you can attach file here.
- Online Capture Methods: Do you want to accept more than just Checks to pay PO orders? If so, you can select another method here. So if a customer checks out with PO as the payment method but wants to pay with a Credit Card afterwards, via the Invoice section you can capture Online via Credit Card or Offline via a Check.
- Store Name – If input, will be displayed on top of the PO Invoice. Often times customs put “Performa Invoice” or “Invoice” if their clients require this as header.
- Memo – If input, will be displayed on the bottom of the PO Invoice.
- Enable Frontend Capture – If set to Yes, allows customers to pay for Invoices when they login to their accounts.
- Allow Frontend Capture for Customer Groups – Can select all or eliminate some customer groups if “Enable Frontend Capture” but don’t want it to include all customer groups.
- Frontend Online Capture Methods – Can select the Payment Methods you want to offer (like Credit Card) for customers to pay their invoices via their account.

### Section 3:

#### Customer Account Added Functionality:

**Account Information**

Personal Customer Attributes

Addresses

Orders

Billing Agreements

Recurring Profiles (beta)

Shopping Cart

Wishlist

Newsletter

Product Reviews

Product Tags

Associate to Website \*

Created From

Group \*

Prefix

First Name \*

Middle Name/Initial

Last Name \*

Suffix

Email \*

Date Of Birth

Tax/VAT Number

Gender

Net Terms

PO Limit

PO Credit

ADDED CUSTOMER ACCOUNT MANAGEMENT

## Ability to manage your customer directly from Customer Information Screen:

- Net Terms – Can set the Net Terms for each customer individually (overrides default from settings).
- PO Limit – Can set the PO Limit for each customer individually (overrides default from settings). This is the maximum credit allowance you're setting for this customer. At no time will the customer be allowed to complete checkout if their total available PO Credit minus PO Limit is surpassed (IE: If PO Limit \$100 and PO Credit is \$40, this leaves your customer with \$60 of credit available for them to spend. If they try to purchase an item for \$70, it will not show the PO Payment Method at checkout on the frontend).
- PO Credit – Available amount of money they currently owe you. If they pay you and you apply to an order, this number will go down. If they make more orders with Payment Method as PO this will go up.

You can manually override PO Credit, but should only be used in rare cases.

Section 4:

Functionality:

Orders Create New Order

Page 1 of 1 pages | View 20 per page | Total 20 records found | [New Order RSS](#) | Export to: CSV | [Export](#) | [Reset Filter](#) | [Search](#)

Select Visible | Unselect Visible | 0 items selected | Actions | [Submit](#)

	Order #	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Net Terms	Payment Method	Purchase Order #	Action
Any		From: To:			From: To:	From: To:					
<input type="checkbox"/>	100000019	Sep 14, 2011 8:54:45 AM	Testing Tester	Testing Tester	\$15.00	\$15.00	Shipped, pending payment	30	Purchase Order	2342342	<a href="#">View</a>
<input type="checkbox"/>	100000017	Sep 7, 2011 10:36:58 PM	First Last	First Last	\$20.00	\$20.00	Complete	14	Purchase Order	1	<a href="#">View</a>

Once installed, you'll now have a way to manage your orders in which customers paid with the payment method "Purchase Orders". Below is the new workflow of your orders:

- 1) Customer places order with payment method "Purchase Orders". Order is created in backend as normal and customer is e-mailed PO Invoice (if enabled). You can manually print PO Invoice from the Order Grid View.
- 2) You ship the order, at this time it changes status to "Shipped, Pending Payment". It will remain at this status until payment is made.
- 3) Payment is secured, you'll go to the Order Grid View, select the Order and then click Invoice at the top right. Once you complete the invoice it will change the Status of the order to Completed.

## Section 5:

### Purchase Order Reporting



## Go to Reports > Accounts Receivables Report:

Report can be filtered by Company Name and Date. You can add a note to a line item by clicking the “Add Note” column on far right.

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