

Order Approval



Magento Extension User Guide

Official extension page: [Order Approval](#)



User Guide: [Order Approval](#)

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

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Catalog

Frontend	
Sitemap	
Product Reviews	
Product Image	
Product Alerts	
Product Alerts Run Settings	
Product Image Placeholders	
Recently Viewed/Compared Products	
Price	
Layered Navigation	
Category Top Navigation	
Search Engine Optimizations	
Catalog Search	
Downloadable Product Options	
Order Item Status to Enable Downloads	Invoiced ▼
Default Maximum Number of Downloads	0
Shareable	No ▼
Default Sample Title	Samples
Default Link Title	Links
Open Links in New Window	Yes ▼
Use Content-Disposition	inline ▼
Disable Guest Checkout if Cart Contains Downloadable Items	No ▼

▲ Guest checkout will only work with shareable.

IMPORTANT! To make the module work with downloadable products please make sure that the 'Order Item Status to Enable Downloads' option is set to **Invoiced**.

To find the option go to **System** → **Configuration** → **Catalog** → **Downloadable Product Options**.



To configure general extension settings please go to **System** → **Configuration** → **Order Approval**.

Order Approval

Save Config

General

Enabled	<input type="text" value="Yes"/>	[STORE VIEW]
Contact Phone	<input type="text" value="+123 4567 6789 79"/>	[STORE VIEW]
Contact Email	<input type="text" value="store.admin@example.com"/>	[STORE VIEW]

Notification

- Admin E-mail notifications
- E-mail notification for customers that order requires approval
- E-mail notification for customers after order disapproval
- E-mail notification for customers after order approval

Enabled - Set to 'Yes' to switch the extension on.

Contact Phone - specify the contact phone number that will be used for Order Disapproval notifications.

Contact Email - specify a contact email address that will be indicated in the Order Disapproval notifications for customers.



Activate the **Checkout Notification option** to inform customers that their order requires additional moderation. The message will be displayed when the order meets at least one of rule conditions.

Order Approval Save Config

General

Notification

Show message with order approval requirements on the checkout STORE VIEW

Message text for the checkout STORE VIEW

Admin E-mail notifications

E-mail notification for customers that order requires approval

E-mail notification for customers after order disapproval

E-mail notification for customers after order approval

Checkout Notification - Enable the display of a checkout notification and specify the notification text.



CHECKOUT

1 BILLING INFORMATION

One or more products in your cart require moderation before purchase. You will be informed when the moderation is done.

First Name *

Jane

Last Name *

Brown

Company

Bright Ideas

Address *

Green Lanes 127

City *

London

Zip/Postal Code *

AB23C1

See the frontend example of the checkout notification about additional order moderation.



Notification recipients can be specified in two ways: by indicating emails or by selecting a specific user role.

Variant #1:

The screenshot shows the 'Order Approval' configuration page. The 'Admin E-mail notifications' section is expanded, showing the following settings:

Notify admin of a new order that requires approval?	Yes	[STORE VIEW]
Recipients	Set up recipients emails	[STORE VIEW]
Recipients emails	store.admin@example.com	[STORE VIEW]
	▲ Several emails should be separated by comma	
Email Template	Email for admin about approving (Default Temp	[STORE VIEW]

Below the 'Admin E-mail notifications' section, there are three expandable sections for customer email notifications:

- E-mail notification for customers that order requires approval
- E-mail notification for customers after order disapproval
- E-mail notification for customers after order approval

Notify admin - enable this option to send an email notification to an admin user once a new order is marked as suspicious.

Recipients - choose “Set up recipients emails” if you want to specify particular emails to which notifications will be sent.

Recipients emails - indicate one or more admin user emails to which notifications will be sent.

Email Template - select the necessary email template.



Variant #2:

Order Approval

General [▼]

Notification [▼]

Admin E-mail notifications [▲]

Notify admin of a new order that requires approval? Yes [▼] [STORE VIEW]

Recipients Choose user role [▼] [STORE VIEW]

Recipients Roles Administrators [▲]
Order Approvers [▼] [STORE VIEW]

Email Template Email for admin about approving (Default Temp [▼] [STORE VIEW]

E-mail notification for customers that order requires approval [▼]

E-mail notification for customers after order disapproval [▼]

E-mail notification for customers after order approval [▼]

Recipients - select the “Choose User Role” option to send email notifications about a new suspicious order to all admin users assigned to a specific role.

Recipients Roles - select the recipient role. In our example, this is the “Order Approvers” role.

NOTE: To create a new admin role please go to **System** → **Permissions** → **Roles**.



There are **3 types of email notifications for customers**. You can enable all of them or only the one(s) you need. Specify an email template for each notification type.

Order Approval		
General		
Notification		
Admin E-mail notifications		
E-mail notification for customers that order requires approval		
E-mail notification for customers that order requires approval	<input type="text" value="Yes"/>	[STORE VIEW]
Email Template	<input type="text" value="Email for customers about approving (Default T"/>	[STORE VIEW]
E-mail notification for customers after order disapproval		
E-mail notification for customers after order disapproval	<input type="text" value="Yes"/>	[STORE VIEW]
Email Template	<input type="text" value="Email for customers after disapproving (Default"/>	[STORE VIEW]
E-mail notification for customers after order approval		
E-mail notification for customers after order approval	<input type="text" value="Yes"/>	[STORE VIEW]
Email Template	<input type="text" value="Email for customers after approving (Default Te"/>	[STORE VIEW]



5. Order Approval Rules

To create a new rule that will trigger order approval go to **Sales** → **Order Approval Rules**.

Order Approval Rules

New Order Approval Rule

Page 1 of 1 pages | View 20 per page | Total 4 records found Reset Filter Search

ID	Name	Enabled	Store View	Action
			All Store Views	
5	More than 10 items in cart	Yes	All Store Views	Edit
6	Payment by Credit Card	No	All Store Views	Edit
7	Downloadable products	Yes	All Store Views	Edit
8	Orders over 1000	Yes	All Store Views	Edit

Click on the **'Edit'** link in the rules grid to view and edit already created rules. Click on the **'New Order Approval Rule'** button to create a new rule.



5. Order Approval Rules

New Rule

General

Name *

Enabled

Stores *
All Store Views
Main Website
Madison Island
English
French
German

Customer Groups *
NOT LOGGED IN
General
Wholesale
VIP Member
Private Sales Member

In the **General** rule settings tab you can:

- Enable the rule;
- Specify rule name;
- Select store views and customer groups for which the rule will work.



New Rule Back Reset Save Save and Continue Edit

Conditions

Apply

Payments

To Specific Payment Method ▼
To Whole Category
To Specific Products
To Specific User's Country
To Specific Payment Method
Custom

NOTE: Hold the CTRL key to select multiple values.

Apply - the module lets you specify one of the predefined conditions or configure custom ones.

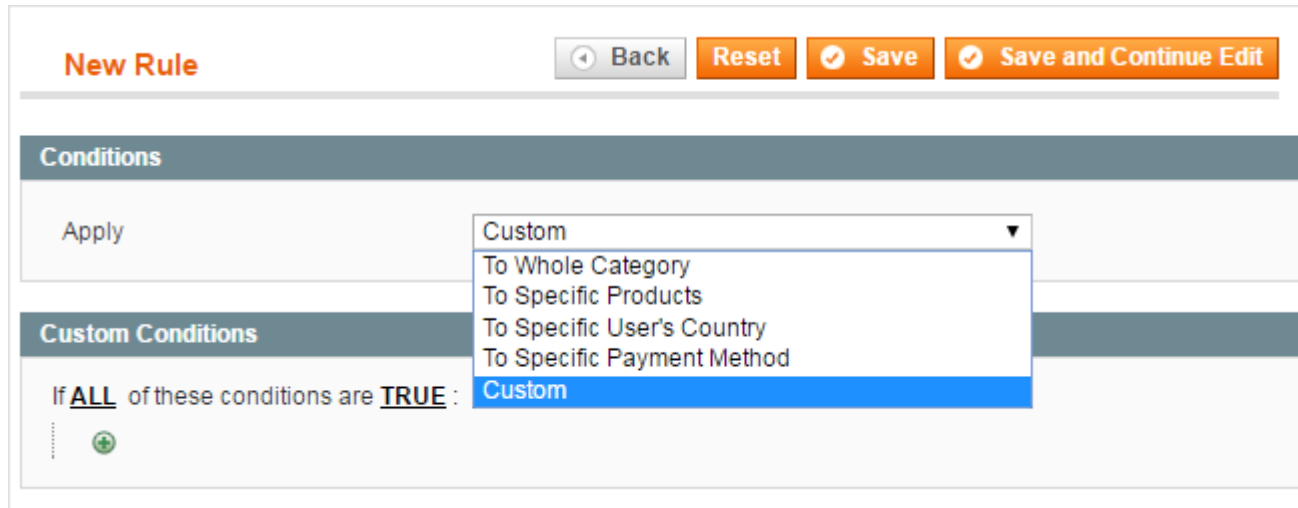
Predefined Conditions are based on:

- Whole product category;
- Specific products (select necessary products);
- User's country (select a country or countries from the dropdown);
- Payment Method (specify a specific payment method).



7. Custom Rule Conditions

Choose the **Custom** condition type to configure your own conditions.



The screenshot shows the 'New Rule' configuration interface. At the top, there are four buttons: 'Back', 'Reset', 'Save', and 'Save and Continue Edit'. Below these is a 'Conditions' section with a header 'Apply'. A dropdown menu is open, showing the following options: 'Custom', 'To Whole Category', 'To Specific Products', 'To Specific User's Country', 'To Specific Payment Method', and 'Custom' (highlighted in blue). Below the dropdown, there is a section titled 'Custom Conditions' with the text 'If **ALL** of these conditions are **TRUE** :'. A green plus icon is visible below this text.



7. Custom Rule Conditions

New Rule Back Reset Save Save and Continue Edit

Conditions

Apply

Custom Conditions

If **ALL** of these conditions are **TRUE** :

If **total quantity equals or greater than 10** for a subselection of items in cart matching **ALL** of these conditions:

✖ +

Please choose a condition to add... ▼

- Please choose a condition to add...
- Product attribute combination**
- Products subselection
- Conditions combination
- Cart Attribute**
- Subtotal
- Total Items Quantity
- Total Weight
- Payment Method
- Shipping Method
- Shipping Postcode
- Shipping Region
- Shipping State/Province
- Shipping Country

You can specify conditions based on multiple parameters like cart attributes, products subselection, conditions and product attributes combinations.



8. 'Orders for Approval' Grid

To open the 'Order for Approval' grid please go to **Sales → Orders for Approving**.

Orders for Approving + Create New Order

Page 1 of 1 pages | View 20 per page | Export to: CSV Export Reset Filter Search

Select Visible | Unselect Visible | 0 items selected Actions ▼ Submit

	Order #	Purchased From (Store)	Purchased On	Bill to Name	G.T. (Purchase	Action
Any			From: <input type="text"/> To: <input type="text"/>		From: <input type="text"/> To: <input type="text"/>	Approve Disapprove
<input checked="" type="checkbox"/>	145000055	Main Website Madison Island English	May 15, 2017 5:09:11 AM	Jane Doe	\$321.55	On Review View
<input checked="" type="checkbox"/>	145000054	Main Website Madison Island English	May 15, 2017 5:07:36 AM	Kate Green	\$319.34	On Review View
<input type="checkbox"/>	145000053	Main Website Madison Island English	May 14, 2017 11:55:44 PM	Peter Parker	\$321.55	Disapproved View
<input type="checkbox"/>	145000052	Main Website Madison Island English	May 14, 2017 11:53:54 PM	Tom Johns	\$321.55	On Review View
<input type="checkbox"/>	145000051	Main Website Madison Island English	May 14, 2017 11:51:35 PM	David Brown	\$321.55	On Review View
<input type="checkbox"/>	145000050	Main Website Madison Island English	May 14, 2017 11:49:20 PM	Jane Doe	\$321.55	On Review View
<input type="checkbox"/>	145000046	Main Website Madison Island English	May 3, 2017 11:58:03 PM	Jane Doe	\$321.55	Disapproved View
<input type="checkbox"/>	145000042	Main Website Madison Island English	May 3, 2017 6:22:53 AM	Nick Adams	\$5.00	Disapproved View

Bulk Actions - to approve/disapprove orders in bulk right from the grid, tick the necessary orders and select the corresponding action in the 'Actions' dropdown.

Export To - export orders for approval to CSV or XML files.

View - to check an order before approval click on the 'View' link in the right column of the grid.



Approve/disapprove orders in one click from the order info page.

Back Edit Cancel Send Email Hold Approve Disapprove

Account Information

Customer Name	Jane Doe
Email	jane.doe@example.com
Customer Group	General

Shipping Address Edit

Jane Doe
10441 Jefferson Blvd, Suite 200
Culver City, California, 90232
United States
T: 888-888-8888

Shipping & Handling Information

Free Shipping - Free \$0.00



To create a new email template please go to **System** → **Transactional Emails** → Click 'Add New **Template**' button.

New Email Template [Back](#) [Reset](#) [Convert to Plain Text](#) [Preview Template](#) [Save Template](#)

Load default template

Template *

Locale *

[Load Template](#)

Template Information

Used as Default For System -> [Configuration](#) -> [Order Approval](#) -> E-mail notification for customers after order approval Template (GLOBAL)

Template Name *

Template Subject *

[Insert Variable...](#)

Template Content *

Load Template - in the Load Template block select the necessary template and click the Load Template Button.

Template Content - after the template is loaded, you can edit email template content according to your needs.



Thank you!

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

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

Your feedback is absolutely welcome!



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