



Sunovisio Corporation

Documentation Order Customer Assignment Extension

This documentation will help you to install and setup the extension in your shop to let you manage customers and orders in an easy way.

Version 1.0.0
11/7/2012

Introduction

Sunovisio Order Customer Assignment will allow you to manage your customers and orders assignment very simply. The extension will add two roles in your shop which are very importants.

The first one is “Customer Manager”. This role will allow you to assign to the user one or several customer group which will be affected to him. The second one is “Order Picker”. This role will allow you to assign some items of orders to pickup in your warehouse to some users. When the quantity fulfilled is ok, the order will move to status “Ready For Shipping”.

Of course, everything is configurable very simply in the administration.

Configuration

The configuration is pretty simple here as we moved the most important configuration on a per user base. You can access the base configuration with going on menu and clicking on System, Configuration and on the left column, find the tab “Order Customer Assignment”.

Order Customer Assignment Save Config

Sunovisio help



Get help when you need it
Contact us via email contact@sunovisio.com and make sure to follow [@sunovisio](#) on Twitter and on [Facebook](#) to not miss out on important product updates, news, and tips!

Check our other extensions
The [Sunovisio extension shop](#) will offer you all extensions you need to increase your sales.

Integration of your shop
Visit our website to follow our previous integration and get a great idea of our abilities <http://www.sunovisio.com>

Bug Tracker
If you have any issue with this extension, don't hesitate to use our bug tracking system to submit a ticket. We will answer you as fast as possible. You can access the ticket system here: http://ac.sunovisio.com/public/index.php?path_info-submit&project=Quote%20Pdf%20Printer

Parameters		
Extension Enabled	<input type="text" value="Yes"/>	[GLOBAL]
Customer Manager Enabled	<input type="text" value="Yes"/>	[GLOBAL]
Order Picker Enabled	<input type="text" value="Yes"/>	[GLOBAL]

On the top, you will see different information about Sunovisio support very interesting for you in case you find any issue with installing the extension. On the second point, you will find the parameters tab which allows you to enable/disable some of the functionalities of the extension. For example, if you need only Order Picker, simply disable the Customer Manager option.

User Permissions

You can set user role going into System, Permissions, Users. After that, click on the user you need to edit permission for. You will find a new tab for this user called “User Assignment”.

User Information

User Info
User Role
REST Role
User Assignment

Edit User 'admin'

Customer Group Assigned	
Is Customer Manager *	<input type="text" value="No"/> <small>▲ Is the user a customer manager?</small>
Can Reassign Orders *	<input type="text" value="Yes"/> <small>▲ Can the user reassign orders to other customer manager?</small>
Is Order Picker *	<input type="text" value="No"/> <small>▲ Is the user an order picker?</small>
Customer Group Assigned	<input type="text" value="NOT LOGGED IN"/> General Wholesale Retailer <small>▲ These values will be saved only if user is customer manager. Else they will be kept empty.</small>

The first field allow you to set the user as customer manager. If so, a new tab will appear in the same section with orders assigned to this user.

User Information

User Info
User Role
REST Role
User Assignment
Orders

Edit User 'admin'

Page of 1 pages | View per page | Total 0 records found | [New Order RSS](#)

Select Visible | Unselect Visible | 0 items selected

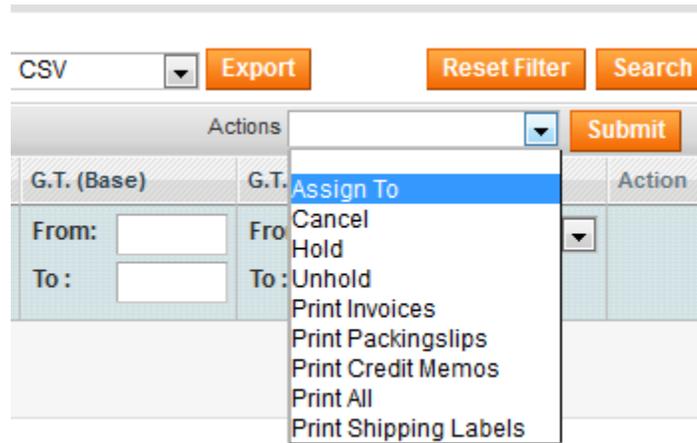
Order #	Purchased On	Bill to Name	Ship to Name
Any	From: <input type="text"/>	<input type="text"/>	<input type="text"/>
	To: <input type="text"/>	<input type="text"/>	<input type="text"/>

Note that when assigning an user to the role Customer Manager, you will need to assign to him at least one role. Else the application will not update the role of this user. Note as well that a group can be assigned to only one user. So if you assign a group a second time to a new user, the first one will lose his permission on this group automatically.

Sales Order Grid

The Sales Order Grid (and all grid linked to sales: invoices, credit memo, shipment) will have a different behavior if the user connected is a customer manager. First of all, the user will be able to see only orders assigned to his customers or assigned directly to him. He will not be able to see any other orders. As well, he will be able to create orders only for his customers and not for

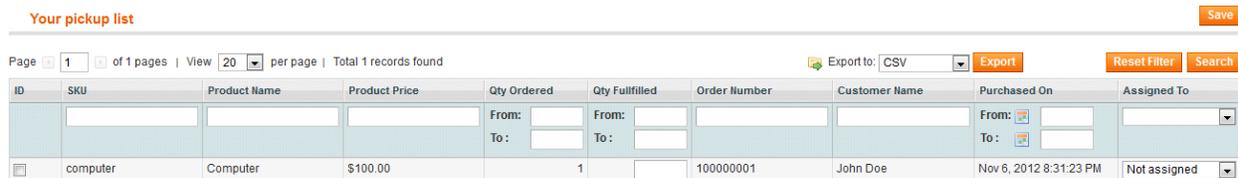
others. If the user is allowed to reassign orders, a new massaction will appear in the grid to allow that.



The same filtering is applied for all sales grid so the same procedure is applied for invoices, shipment and credit memo. There is no possibility that your customer manager get some conflicts as everything is managed separately.

Pickup List as administrator

If the user connected is not an order picker, he will be able to assign items from order to different order picker.



You can see that this item in the order 100000001 is not assigned to anybody yet. As administrator, you can assign it to one of the order picker simply by changing the value in the column Assign To and clicking on Save.

Pickup List as Order Picker

If the user connected is an order picker, he will not be able to reassign the item but will be able to edit the column quantity fulfilled. When he will save the grid, the order will be automatically updated to Ready For Shipping status following this rules: all items of the order have a quantity fulfilled equal to the quantity ordered. Note that items of one order can be assigned to different order picker.

Your pickup list Save

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

ID	SKU	Product Name	Product Price	Qty Ordered	Qty Fulfilled	Order Number	Customer Name	Purchased On
				From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>			From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/>	computer	Computer	\$100.00	1	0 0	100000001	John Doe	Nov 6, 2012 8:31:23 PM

Now let's fill the quantity fulfilled of the current item to one and click on save. You can see that the item disappeared from the pickup list and the status of the order change to Ready For Shipping. As administrator, you know now that everything is ready and you can create the shipment without any issue.

Support

If you have any problem with installing the extension, you can contact us via your account on <http://ecommerce.sunovisio.com> using the ticket system or the chat. You can use as well our contact email address contact@sunovisio.com or skype farge.loic.
Thanks for your trust in Sunovisio Corporation.