

Advanced Order Manager

Full Capabilities and Features Reference

AOM provides a complete administration workflow for creating and editing Phoenix orders, including MOTO and other manually entered sales. It uses normal Phoenix order data and remains compatible with standard order pages, invoices, packing slips and supported addons.

Release	Details
Version	1.1.0
Platform	CE Phoenix Cart
Primary compatibility	Phoenix 1.1.0.6 on PHP 8.2
Discount integration	Compatible Discount Codes 6.3 addon (optional and supplied separately)
Architecture	Admin addon and hooks; no Phoenix core changes
Author	Mort-Lemur
Licence	GNU General Public License

V1.1 release focus

Secure Discount Codes 6.3 compatibility, VAT-correct live discount totals, safe usage tracking, and refinements to shipping and currency display.

1. Purpose and scope

Advanced Order Manager (AOM) is designed for telephone, email, mail-order, trade-counter and other manually entered orders. Administrators can build a new order or safely revise an existing one without recreating it outside Phoenix.

AOM works with Phoenix customer, address, catalogue, attribute, order, tax, currency, shipping, payment, stock and status records. Orders are saved to the standard Phoenix tables. No Phoenix core-file modification is required.

Capabilities at a glance

Area	Capability
Create orders	Build complete manual or MOTO orders for existing or newly entered customers.
Edit orders	Reopen orders and revise customer details, addresses, products, quantities, prices, VAT, shipping, payment, comments and status.
Products	Use catalogue products with native attributes or add custom non-catalogue lines.
Discounts	Optionally apply, preserve, validate and recalculate discounts from a compatible Discount Codes 6.3 installation.
Stock	Follow Phoenix stock-check, checkout and stock-subtraction settings.
Documents	Continue to Phoenix invoice and packing-slip workflows and optionally send order email.

2. Order creation and customer handling

Customer search and entry

- Search existing customers using partial details and choose from an automatic dropdown.
- Display identifying details such as account number, name, company, postcode, telephone and email when available.
- Populate the form from the selected account and default address.
- Enter a new customer directly and create the required customer, customer information and address-book records inside the save transaction.
- Use separate billing and delivery addresses, including Phoenix country and zone data.

MOTO capability

AOM is suitable for Mail Order / Telephone Order workflows. The administrator records the selected payment method and order information while any actual payment capture remains the responsibility of the installed payment provider or the merchant's separate MOTO process.

3. Products, attributes and prices

Catalogue product search

- Search by name, model and manufacturer, with SKU, UPC and EAN support where those database columns exist.
- Prioritise exact and prefix matches and display useful product, price and stock details.
- Add multiple product lines and change quantity, unit price and VAT treatment before saving.
- Remove unwanted lines and see product, VAT and order totals update in the browser.

Native Phoenix attributes

- Detect products that have native Phoenix attributes and request option choices before adding them.
- Show option groups and values using their configured language names.
- Include attribute price adjustments in the displayed and saved order-line price.
- Save selections in `orders_products_attributes` and restore them when editing.

Custom non-catalogue items

- Add products, services or charges that do not exist in the catalogue.
- Set a custom name, model, weight, quantity, price and VAT rate.
- Prefix a supplied custom model with C-; a blank model remains blank.
- Exclude custom items from catalogue stock adjustment.

4. Existing-order search and editing

- Open an order directly from an AOM URL or the Phoenix Orders infobox button.
- Search by order number, customer first name, surname, full name or postcode.
- Return all matching orders, including multiple orders belonging to one customer or people sharing a surname.
- Load and revise the complete order: addresses, products, attributes, quantities, prices, VAT, shipping, payment, status and comments.
- Rebuild the Phoenix order-total rows safely from the validated server-side calculation.
- Reconcile stock using only the difference between old and new catalogue quantities.

5. Discount Codes 6.3 compatibility

V1.1 adds optional integration with a Phoenix 1.1.0.6/PHP 8.2-compatible installation of the separate Discount Codes 6.3 addon. The Discount Codes addon itself is not included with AOM. If it is not installed, normal AOM create and edit workflows continue without the discount-code controls.

Create, edit and display

- Show a Discount Code field when the compatible addon is detected.
- Apply a valid code to a new manual order or to an existing order.
- Detect and display an existing code and saved `ot_discount` value when an order is opened.
- Allow a code to be retained, changed or deliberately removed.
- Preview the validated discount, VAT correction, Total Tax and Grand Total while the order is changed.

Server-side validation and calculation

- Never trust a discount amount supplied by the browser; the server reloads the definition and calculates the result.
- Validate enabled status, date, minimum order, customer/email eligibility, newsletter requirement and customer order-number rules.
- Validate product, category and manufacturer scope, excluded products, specials exclusions and maximum eligible product quantity.
- Validate global and per-customer usage limits while recognising the unchanged code on the order being edited.
- Support fixed-value and percentage discounts, mixed VAT allocation and supported shipping discounts.
- Stop the save with a clear warning if an existing discount cannot be safely validated or reconstructed.

Totals and usage integrity

- Recreate `ot_discount` with the validated title, negative value and configured sort order.
- Reduce Total Tax by the VAT represented in the discount and recalculate `ot_total`.
- Preserve usage counts when an unchanged discounted order is repeatedly edited.
- Adjust usage records only when a code is deliberately added, changed or removed.
- Reject inconsistent usage state rather than silently altering the order.

6. Tax, currency and totals

- Load available Phoenix tax classes and rates dynamically, including fractional rates.
- Allow the administrator to select product and custom-shipping VAT treatment.
- Calculate product subtotal, product VAT, shipping, shipping VAT, discount VAT correction and grand total.
- Restore saved shipping and tax data when an existing order is reopened.
- Use the configured order/store currency code, symbols, decimal precision and formatting.
- Render currency entities correctly instead of displaying literal entity text such as .
- Update displayed totals as products, quantities, prices, VAT, shipping or discount code change.

Phoenix order totals

Class	Purpose
ot_spacer	Optional visual spacer retained in the standard totals sequence.
ot_subtotal	Product subtotal.
ot_shipping	Shipping value in the format expected by the saved Phoenix order.
ot_tax	Total VAT after any validated discount VAT correction.
ot_total	Final payable grand total.
ot_discount	Validated negative discount row when a code applies.

7. Shipping and payment

Shipping

- Discover enabled Phoenix shipping modules and display friendly titles.
- Build the temporary cart, order, destination, weight and box context required for module quotations.
- Support Phoenix Per Item shipping by supplying the item count and physical-order context expected by that module.
- Apply configured tare/padding and maximum-box-weight calculations.
- Calculate shipping VAT from the selected module tax class where applicable.
- Allow custom shipping title, charge and VAT rate when an installed module is not suitable.

Payment

- Discover installed payment modules and show friendly configured payment titles.
- Record or change the payment method on an order.
- AOM records the method; it does not itself capture card payments or issue refunds.

8. Stock and product-status behaviour

AOM follows the relevant Phoenix configuration rather than imposing a separate stock policy.

Phoenix setting	AOM behaviour
Check stock level: enabled	Calculate whether requested additional quantities would take catalogue stock below zero.
Check stock level: disabled	Do not apply AOM shortage warnings or blocks.
Allow checkout: enabled	Warn and request administrator confirmation before saving a below-zero result.
Allow checkout: disabled	Block the save when the additional quantity exceeds available stock.
Subtract stock: enabled	Adjust products_quantity for catalogue products when creating or editing.
Subtract stock: disabled	Do not reduce products_quantity.

Reconciliation rules

- Deduct full catalogue quantity on a new order when stock subtraction is enabled.
- On edit, apply only the difference: increases deduct, reductions and removals return stock.
- Combine repeated lines for the same parent product when checking availability.
- Recognise the edited order's existing quantity as already deducted to avoid false shortages.
- Reconcile products_ordered values alongside stock quantities.
- Do not adjust catalogue stock for custom non-catalogue lines.

Scope: V1.1 manages native Phoenix parent-product stock. QTPro and other third-party attribute-stock tables are outside the supported scope.

9. Status, email, documents and navigation

- Choose from installed order statuses and add a normal history entry when required.
- Add comments and control customer notification and comment inclusion.
- Optionally send a new-order confirmation for a manually created order.
- Continue directly to Save, Invoice or Packing Slip actions.
- Cancel back to the normal Orders page and return there from the AOM landing page.
- Hide the Edit in AOM infobox button during Phoenix delete and delete-confirm actions.

10. Safety, compatibility and test coverage

Safety and compatibility

- No Phoenix core-file changes are required.
- Database writes are transaction-based so a failed validation can roll back the order save.
- Server-side calculations are authoritative for prices, tax, discounts and totals.
- Discount support is feature-detected, allowing AOM to run when Discount Codes 6.3 is absent.
- Orders remain readable by standard Phoenix administration pages and documents.

Included discount test coverage

- Fixed-value and percentage discounts.
- Mixed VAT allocation and shipping discounts.
- Customer eligibility, minimum-order, expiry, order-number and usage restrictions.
- Product eligibility and maximum eligible quantity.
- Changing order contents, removing a code and repeatedly editing the same discounted order.
- Automatic discovery of renamed Phoenix administration directories.

The test suite is optional and may be removed from the live server after it reports: **AOM discount tests passed.**

For file placement, upgrade instructions and post-install checks, see Installation.pdf included with the release.