Advanced Order Manager

Full Capabilities and Features Reference

Release	Version 1.2.0 - 28 October 2026
Platform	CE Phoenix Cart
Primary compatibility	Phoenix 1.1.0.6 on PHP 8.2
Architecture	Administration addon and hook; no Phoenix core changes
Optional integrations	Discount Codes 6.3, Phoenix Option Types v2, Fancy Invoice
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V1.2 release focus
Precise manual discount/credit lines, restored shipping context, safer and clearer Edit Order searching, and customer-entered Text/Text area support.

AOM provides a complete administration workflow for creating and editing Phoenix orders, including MOTO and other manually entered sales. Orders use normal Phoenix tables and remain compatible with standard order pages, documents and supported addons.

1. Purpose and scope

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 order without recreating it outside Phoenix.

Area	Capability
Create orders	Build complete manual or MOTO orders for existing or newly entered customers.
Edit orders	Revise customer details, addresses, products, quantities, prices, VAT, shipping, payment, comments and status.
Products	Use catalogue products, native attributes, supported Option Types v2 text fields, or custom lines.
Credits	Add deliberate manual discount/credit lines as negative custom products.
Discount Codes	Optionally validate, preserve and recalculate codes from a compatible separate addon.
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. Customer and address handling

- Search existing customers using partial details and display account number, name, company, postcode, telephone and email when available.
- Populate the form from the selected account and default address.
- Enter a new customer and create the required customer, customer-information and address-book records inside the save transaction.
- Use separate billing and delivery addresses with Phoenix country and zone data.
- On Edit Order, replacement-customer search is hidden until an order is loaded and customer fields are deliberately unlocked.

3. Products, attributes and prices

Catalogue product search

- Search by name, model, manufacturer, SKU, UPC and EAN where those columns exist.
- Display identifying product metadata, price and stock details in the result list.
- Add multiple lines and change quantity, unit price and VAT treatment before saving.

Native Phoenix attributes

- Detect attribute-bearing products and request option choices before adding them.
- Include configured attribute price adjustments in displayed and saved line prices.
- Save selections in orders_products_attributes and restore them on edit.

Phoenix Option Types v2 compatibility

- Feature-detect the separate addon without making it a requirement.
- Render type 1 Text as a text box and type 2 Text area as a multiline box.
- Restore entered values, maximum length, comments and price adjustments.
- Validate the current product/option definition server-side and escape entered text in AOM.
- File-upload options remain outside the AOM V1.2 workflow.

Custom non-catalogue items

- Add products, services or charges absent from the catalogue.
- Set name, model, weight, quantity, price and VAT rate; exclude custom lines from catalogue stock adjustment.

4. Manual Discount / Credit lines

V1.2 adds a deliberate Manual Discount / Credit mode to Custom Item on both Create and Edit Order.

- The administrator enters a positive VAT-inclusive discount amount; AOM creates one negative custom line.
- Quantity is fixed at one and weight at zero.
- Negative prices remain prohibited for catalogue products.
- The entered two-decimal gross amount is authoritative; AOM derives the precise four-decimal net value server-side.
- The line participates correctly in subtotal, product VAT, Total Tax and Grand Total.
- Repeated edits preserve the intended gross credit instead of accumulating rounding drift.
- Manual credits are separate from Discount Codes and do not alter code usage records.

For shops using the separate Fancy Invoice addon, the included optional file displays negative VAT-inclusive lines symmetrically. It is not needed for Phoenix standard invoices or for ordinary positive product values.

5. Existing-order search and editing

- Open an order directly from an AOM URL or the Phoenix Orders infobox button.
- Search by order number, customer name or postcode with clearer start guidance.
- Return all matching orders rather than collapsing multiple orders belonging to one customer.
- Load and revise addresses, products, attributes, quantities, prices, VAT, shipping, payment, status and comments.
- Rebuild Phoenix order-total rows from the validated server-side calculation.

6. Discount Codes 6.3 compatibility

The Discount Codes addon is separate and is not installed by AOM. When a compatible installation is detected, AOM provides create, edit and live-preview controls.

- Apply a valid code to a new or existing order; retain, change or deliberately remove it.
- Detect an existing code and saved ot_discount value.
- Validate enabled status, dates, minimum order, customer/email eligibility, newsletter and order-number rules.
- Validate product, category and manufacturer scope, exclusions, specials, usage limits and maximum eligible quantity.
- Support fixed, percentage, mixed-VAT and supported shipping discounts.
- Recreate ot_discount, correct Total Tax and recalculate ot_total.
- Preserve usage counts on an unchanged edit and reconcile records only when a code is added, changed or removed.
- Stop the save with a clear warning when a discount cannot be reconstructed safely.

7. Tax, currency and totals

- Load Phoenix tax classes and rates dynamically, including fractional rates.
- Calculate product subtotal, VAT, shipping VAT, discount VAT correction and grand total.
- Use the order/store currency code, symbols, decimal precision and configured formatting.
- Update browser totals as products, quantities, prices, VAT, shipping, manual credits or discount codes change.

8. Shipping and payment

Shipping

- Discover enabled Phoenix shipping modules and display friendly titles.
- Build the temporary cart, destination, item count, physical weight and box context required for quotations.
- Preserve the saved shipping title, including carrier/service information, when an order is reopened.
- Restore catalogue-product weight before requesting a new quotation.
- Support Per Item shipping and Phoenix tare, padding and maximum-box-weight rules.
- Allow manual shipping title, charge and VAT rate when an installed module is unsuitable.

Payment

- Discover installed payment modules and show configured titles.
- Record or change the method; AOM does not capture cards or issue refunds.

9. Stock behaviour

Phoenix setting	AOM behaviour
Check stock enabled	Calculate whether requested additional catalogue quantity would take stock below zero.
Check stock disabled	Do not apply AOM shortage warnings or blocks.
Allow checkout enabled	Warn and request confirmation before a below-zero save.
Allow checkout disabled	Block a save that exceeds available stock.
Subtract stock enabled	Adjust catalogue stock by the full new-order quantity or the edit difference.
Subtract stock disabled	Do not reduce products_quantity.

10. Status, email, documents and navigation

- Choose installed order statuses and add normal history entries.
- 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 Orders and hide Edit in AOM during delete actions.

11. Safety and compatibility

- No Phoenix core-file changes or AOM database tables are required.
- Order saves are transactional so failed validation can roll back.
- Server-side calculations remain authoritative for prices, tax, manual credits, Discount Codes and totals.
- Optional integrations are feature-detected and remain dormant when absent.
- Customer-entered option text is validated and escaped before AOM display.
- Orders remain readable by standard Phoenix administration pages and documents.

12. Included test coverage

- Discount fixed/percentage values, mixed VAT and shipping discounts.
- Customer, minimum-order, expiry, order-number, product and usage restrictions.
- Changing order contents, removing a code and repeatedly editing a discounted order.
- Automatic discovery of renamed Phoenix administration directories.

The test suite is optional and may be removed after it reports: AOM discount tests passed. Manual-credit, shipping-context and Option Types v2 checks are listed in the installation guide for live Phoenix integration testing.