ÉTOILE WEB DESIGN

ORDER TRACKING PLUGIN

GETTING STARTED GUIDE

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This manual will guide you on how to perform the basic tasks to get going with the Order Tracking Plugin.

Once you have installed the plugin, go to the plugin *Dashboard*. Dashboard gives you option to upgrade to premium (full) version to enjoy all plugin features. It also displays a comprehensive order summary, like: the Number of Orders, Most Recent Order, number of Views, and a list of Recent Order Summary.

If you have any trouble using our plugin, our ultimate support is there to assist you with your queries.

Create Orders

In the 'Orders' tab, you can create orders that visitors will be able to check. Use the form on the left to create an order, and then send the order number to a client so that they can view progress on their order (more on this below). You can also update the status of an order from this tab.

1. Manually Add a New Order

    Enter the following details to manually add a new order, then click on *Add New Order* to save this order:

    1. **Name:** The name of the order your users will see.
    2. **Order Number:** The number that visitors will search to find the order.
    3. **Order Email:** The e-mail address to send order updates to, if you have selected that option.
    4. **Order Status:** The status that visitors will see if they enter the order number.
    5. **Order Location:** The location that visitors will see if they enter the order number.
    6. **Customer:** The customer that this order is associated with.
    7. **Sales Rep:** The sales rep that this order is associated with.
    8. **Public Order Notes:** The notes that visitors will see if they enter the order number.

9. **Private Order Notes:** The notes about an order visible only to admins.
10. **Show in Admin Table:** Should this order appear in the orders table in the admin area?

2. Add/Update Orders from Spreadsheet

To import orders from spreadsheet, Choose File and click on *Add New Orders*.

Note: Make sure that the column title names are the same as the field names for orders (ex: Name, Number, Status, etc.), and that any statuses are written exactly the same as they are

online. To update an order, make sure the order numbers are exactly the same. Also, Custom Fields needs to exist first before importing.

3. Export Orders to Spreadsheet

Clicking on *Export to Excel* will download all orders currently in the database to Excel. It is always a good practice to save a backup of your orders in case you want to recover them in the future.

Displaying Tracking Forms

Use the following shortcode to display tracking forms on your page/post. We will learn more about these later in this guide.

1. Displaying Tracking Form

[tracking-form]
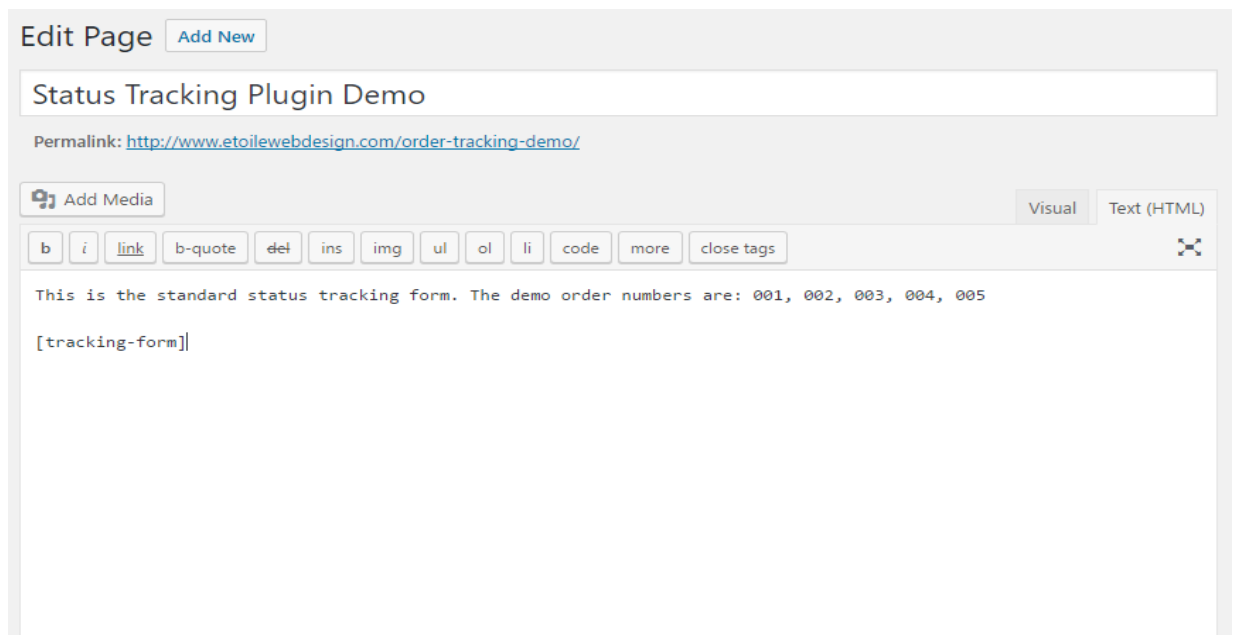
A front-end page view (customized) of the above shortcode will look like this:

This is the standard status tracking form. The demo order numbers are: 001, 002, 003, 004, 005

Track an Order

Order Number:

Order Number...

Track

2. Display Customer Tracking Form

[customer-form]

Edit Page Add New

Customer Form

Permalink: http://www.etoilewebdesign.com/order-tracking-demo/customer-form/ Edit

Add Media   Visual   Text (HTML)

| b | i | link | b-quote | del | ins | img | ul | ol | li | code | more | close tags |

This form allows a customer to see all of their orders. The demo customer numbers are: 1, 2, 3 and 4

[customer-form]

A front-end page view (customized) of the above shortcode will look like this:

CUSTOMER FORM
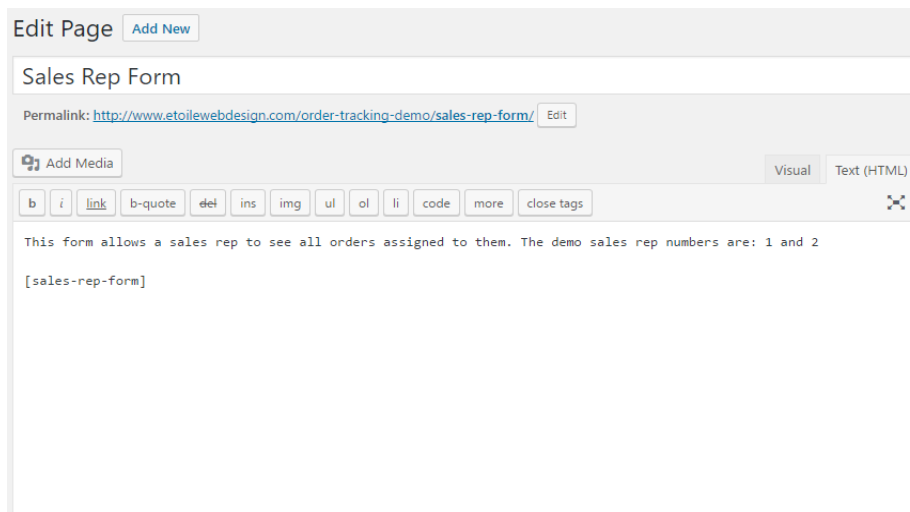
This form allows a customer to see all of their orders. The demo customer numbers are: 1, 2, 3 and 4
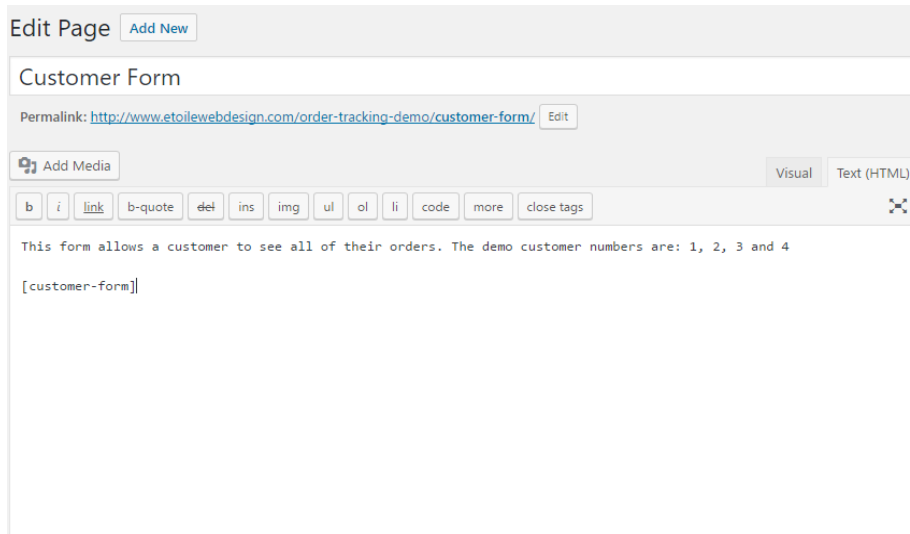
Track your Orders

Customer Number:

Customer Number...

Track

3. Display Sales Rep Tracking Form

[sales-rep-form]

Edit Page Add New

Sales Rep Form

Permalink: http://www.etoilewebdesign.com/order-tracking-demo/sales-rep-form/ Edit

Add Media   Visual   Text (HTML)

| b | i | link | b-quote | del | ins | img | ul | ol | li | code | more | close tags |

This form allows a sales rep to see all orders assigned to them. The demo sales rep numbers are: 1 and 2

[sales-rep-form]

A front-end page view (customized) of the above shortcode will look like this:

SALES REP FORM

This form allows a sales rep to see all orders assigned to them. The demo sales rep numbers are: 1 and 2

Track your Orders

Sales Rep Number:

Sales Rep Number...

Track

Displaying Customer Order Form [Premium]

You can use the customer-order shortcode to allow people to submit orders via the front end. You can use the order_status attribute to set the status for the newly-submitted order and the order_location attribute to set the location for the newly-submitted order.

Edit Page Add New

Customer Order Page

Permalink: http://www.etoilewebdesign.com/order-tracking-demo/customer-order-demo/ Edit

Add Media   Visual   Text (HTML)

b   i   link   b-quote   del   ins   img   ul   ol   li   code   more   close tags

[customer-order order_status='Order Received' order_location='EWD Warehouse']

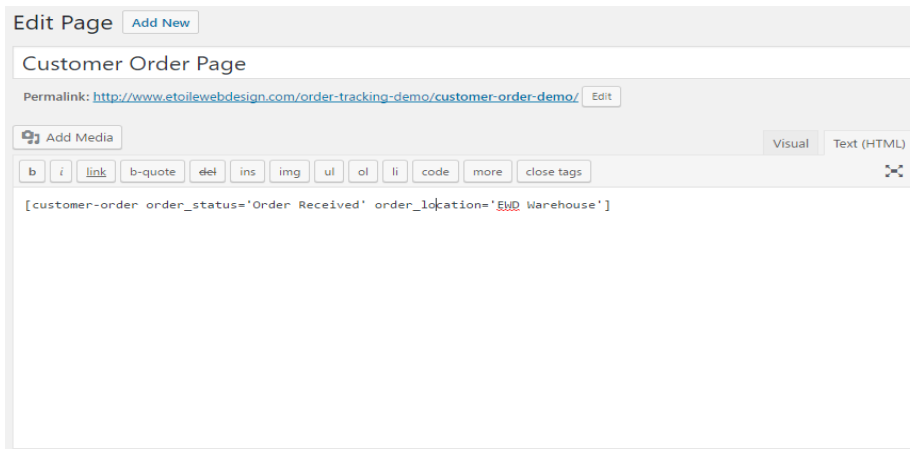A front-end page view (customized) of the above shortcode will look like this:

CUSTOMER ORDER PAGE

Order Name:

Order E-mail Address:

The e-mail address to send order updates to, if the site administrator has selected that option.

Customer Notes:
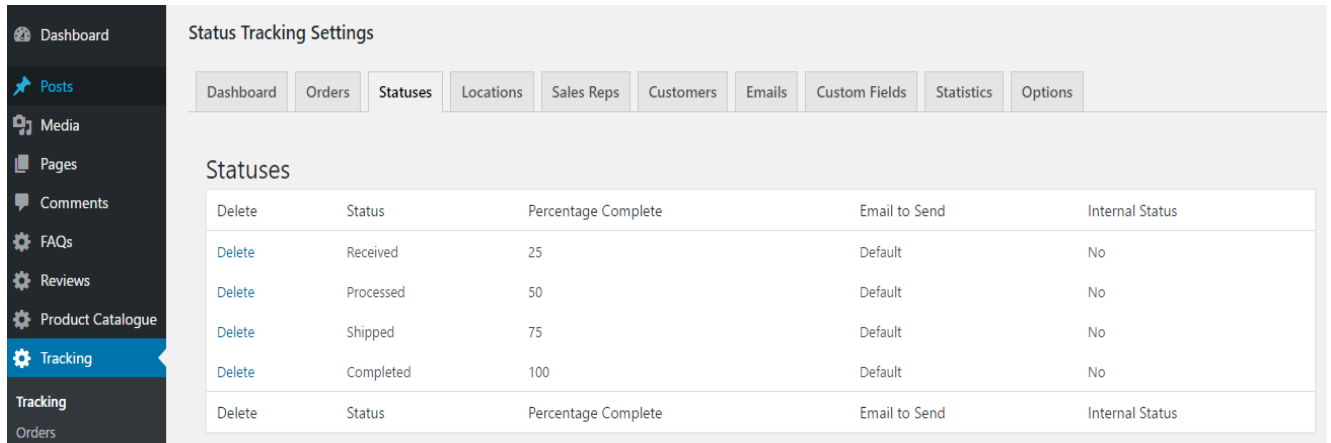
Quantity:

Additional Options:
☐ Rush Delivery
☐ Gift Wrapped
☐ Personalized Note
☐ Something Else

Drop Down Select Box:

All

Send Order

Add Statuses

You can create your own statuses, or use the following default ones that are available when the plugin is installed.
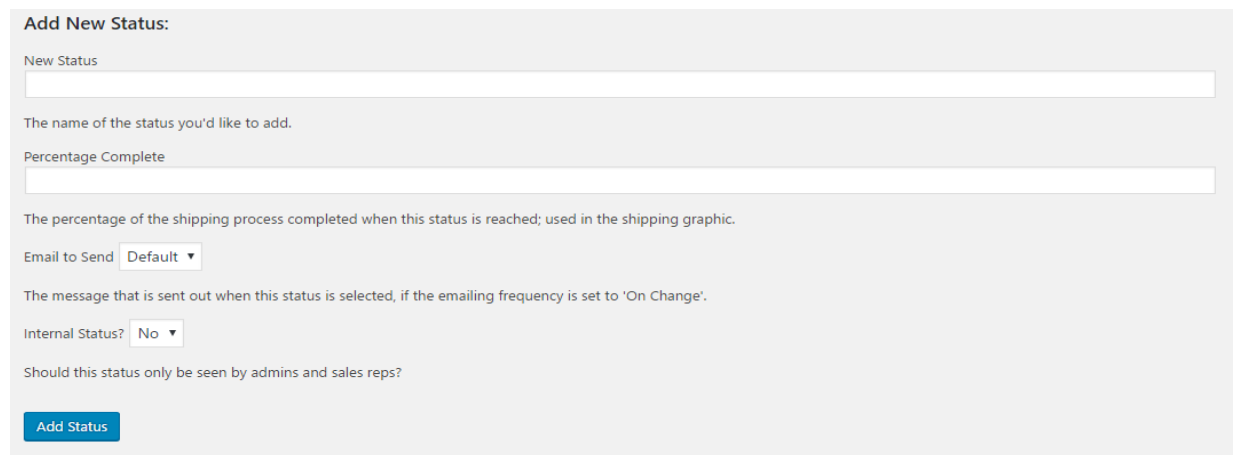
To add a new status, enter the following fields and then click *Add Status*:

1. **New Status:** The name of the status you'd like to add.
2. **Percentage Complete:** The completion percentage when this status is reached; used in the graphic.
3. **Email to Send:** The message that is sent out when this status is selected, if the emailing frequency is set to 'On Change'.

   Note: The 'Email to Send' field contains a list of all email messages you've created in the Emails tab. You can select a different message to go out with each status.

4. **Internal Status:** *Yes or No?* Should this status only be seen by admins and sales reps?

Locations [Premium]

In this tab, you can see all the locations that you have added and the option to add new locations.

To add new location, enter the following and click *Add Location*:

1. **New Location:** The name of the location you'd like to add.
2. **Location Latitude:** The latitude of the location, if you'd like it to display on the map.
3. **Location Longitude:** The longitude of the location, if you'd like it to display on the map. Add Location

Sales Reps [Premium]

In this tab, you can add sales representatives. While adding a new sales representative you have the option to assign it to existing WordPress user in your site.

The right panel shows a list of sales representatives that already exists and the left panel allows you to add new ones. To add a new Sales Rep, enter the following and click on *Add New Sales Rep*:

1. **First Name:** The first name of the sales rep.
2. **Last Name:** The last name of the sales rep.
3. **Sale Rep Email:** The email address of the sales rep.
4. **Sales Rep WP Username:** What WordPress user should be able to update the orders assigned to this Sales Rep? Note: This will create an admin view with the label "Order Tracking" on the WordPress menu of this user.

Customers [Premium]

Customers are the users who have placed orders in your site. To see a list of all the customers or to add new ones, go to the Customers tab of Status Tracking Plugin.

The right panel shows a list of customers that already exists and the left panel allows you to add new ones. To add a new Customer, enter the following and click on *Add New Customer*:

1. **Customer Name:** The name of the customer.
2. **Customer Email:** The email address of the customer.
3. **Sales Rep ID:** The sales rep's ID for this customer.
4. **Customer WP Username:** What WordPress user, if any, is assigned to this customer? Make mention of how if a customer is logged in with their WordPress user account and they go to the page with the [customer-form] shortcode on it, they will automatically see all their orders without having to enter in their customer ID.
5. **Customer FEUP Username:** What Front End Only User, if any, is assigned to this customer? For more information on FEUP users: https://wordpress.org/plugins/front-end-only-users/

Create Email Messages

You can create as many different email update messages as you'd like. Different messages can be set to go out whenever an order is set to a certain status (e.g.: 'Completed' status could have a message saying 'Order completed ... etc.').

Note: For automatic email sending, to help avoid being labelled as spam, we recommend installing a plugin such as WP Mail SMTP that lets you send the emails via an external server.

Status Tracking Settings

| Dashboard | Orders | Statuses | Locations | Sales Reps | Customers | Emails | Custom Fields | Statistics | Options |

Email Settings

We've switched to using the default WordPress SMTP mail function. To send SMTP email, use a plugin such as WP Mail SMTP to input your settings

Subject Line

    Order Updates

The subject line for your e-mails.

Admin Email

    contact@etoilewebdesi

What email should customer note and customer order notifications be sent to, if they'd been set in the "Premium" area of the "Options" tab?

Status Tracking URL

    http://www.etoilewebde

The URL of your tracking page, required if you want to include a tracking link in your message body.

E-mail Messages

	Message Name	**Message**
Delete	Received	Hello [customer-name], We have received your order with the order number [order-number]. Thanks.
Delete	Update	Hi [customer-name], We have great news. The order [order-name] has updated its status. Here is all the information: Order name : [order-name] Order number : [order-number] Status : [order-status] Note : [order-notes] Time : [order-time] Sales rep: [sales-rep] If you wish to view it, you may click the following link : [tracking-link]

Add

What should be in the messages sent to users? You can put [order-name], [order-number], [order-status], [order-notes], [customer-notes] and [order-time] into the message, to include current order name, order number, order status, public order notes or the time the order was updated.
You can also use [tracking-link], [customer-name], [customer-id], [sales-rep] or the slug of a customer field enclosed in square brackets to include those fields in the e-mail.

Save Changes

To setup email messages, enter the following and click on *Save Changes*:

1. **Subject Line:** The subject line for your emails.
2. **Admin Email:** What email should customer note and customer order notifications be sent to, if they'd been set in the "Premium" area of the "Options" tab?
3. **Status Tracking URL:** The URL of your tracking page, required if you want to include a tracking link in your message body.
4. **Email Messages:** What should be in the messages sent to users? You can set as many email messages as you want, e.g:

   a. Received Message

      Hello [customer-name],

      We have received your order with the order number [order-number].

      Thanks.

   b. Update Message

      Hi [customer-name],

      We have great news. The order [order-name] has updated its status. Here is all the information:

      Order name : [order-name]
      Order number : [order-number]
      Status : [order-status]
      Note : [order-notes]
      Time : [order-time]
      Sales rep: [sales-rep]

      If you wish to view it, you may click the following link : [tracking-link]

      Similarly, you can add different email messages for different status types of your orders. The "Email To Send" option is available in the "Statuses" tab.

Note: You can put [order-name], [order-number], [order-status], [order-notes], [customer-notes] and [order-time] into the message, to include current order name, order number, order status, public order notes or the time the order was updated. You can also use [tracking-link], [customer-name], [customer-id], [sales-rep] or the slug of a customer field enclosed in square brackets to include those fields in the e-mail.

Custom Fields [Premium]

This is a great feature if you like customizing the plugin as per your needs. This feature allows you to create your own fields on the Order page.
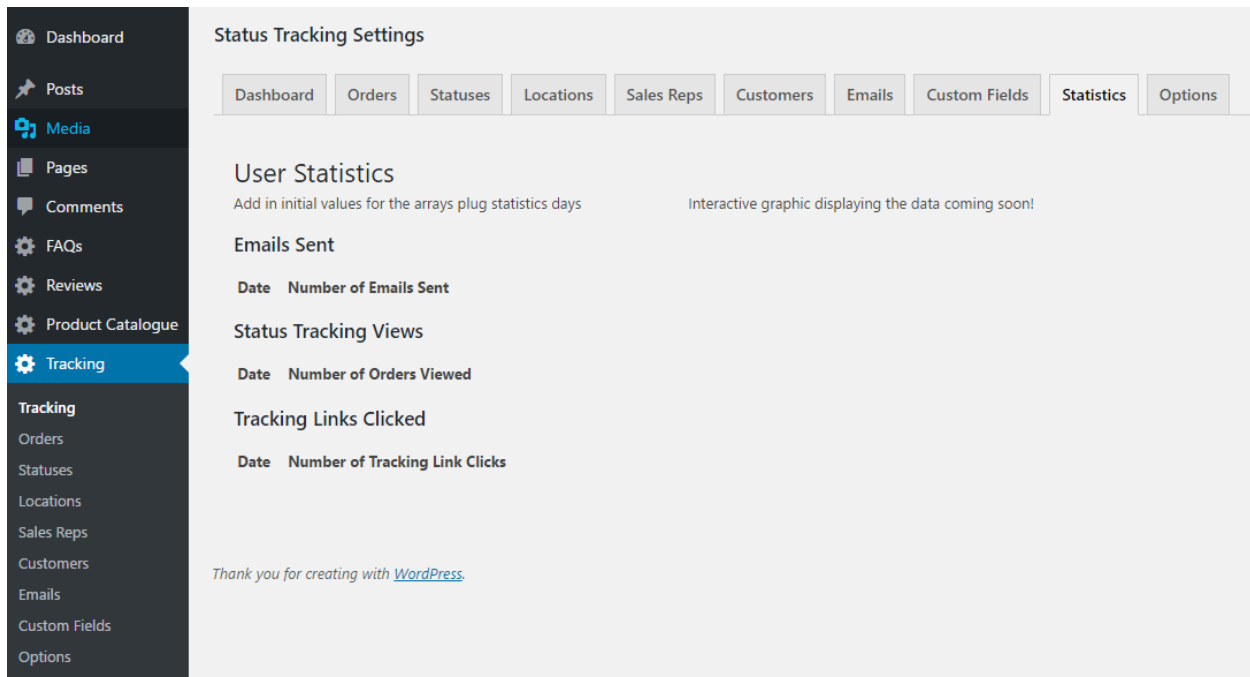

The right panel shows a list of Custom Fields that already exists and the left panel allows you to add new ones. To add a new Custom Field, enter the following and click on *Add New Field*:

1. **Name:** The name of the field you will see.
2. **Slug:** An all-lowercase name that will be used to insert the field (you should use only letters, numbers and hyphens).
3. **Type:** The input method for the field and type of data that the field will hold.
4. **Description:** The description of the field, which you will see as the instruction for the field.
5. **Input Values:** A comma-separated list of acceptable input values for this field. These values will be the options for select, checkbox, and radio inputs. All values will be accepted if left blank.

6. **Custom Order Display:** *Yes or No?* If you're using the customer order form, should this field be displayed on it? (Use 'Input Values' above to restrict inputs).
7. **Customer Order – Required:** *Yes or No?* If you're using the customer order form and this field is being displayed (above option), should this field be required?
8. **Field For:** What should this field apply to: *Orders, Customers or Sales Reps*?

Statistics [Premium]

An excellent feature that helps you keep track of number of emails sent, number of orders viewed and number of tracking link clicks.

Options

The 'Options' tab has options to help customize the plugin for your uses, including:

- Choosing what order information is displayed
- Setting when emails are sent about orders
- Styling the tracking form
- Customizing using Custom CSS
- Added security by requiring users to enter their email and more!

1. Basic
   a. **Custom CSS:** You can add custom CSS styles for your order form in this box.

b. **Order Information Displayed:** Select all the fields that you wish to display in the order tracking form for each order.

☑ Order Number
☑ Name
☑ Status
☑ Location
☑ Updated Date
☐ Notes
☑ Customer Notes
☑ Status Graphic
☑ Tracking Map
☑ Quantity

Customer Information:

☑ Customer Name
☑ Customer Email

Sales Rep Information:

☑ Sales Rep First Name
☑ Sales Rep Last Name

c. **Order Form Instructions:** The instructions that will display above the order form.

Track an Order

Enter the order number you would like to track in the form below.

Order Number: [Order Number...]

[Track]

d. **Set Timezone:** Define what timezone should be used when sending the orders to the WordPress database?

[(GMT-05:00) Eastern Time (US & Can ▼]

e. **Date/Time Format:** Define the date/time format, e.g.: North American (YY-DD-MM) or European (DD-MM-YY).

f. **Order E-mail Frequency:** *On Change, On Creation or Never?* How often should e-mails be sent to customers about the status of their orders?

g. **AJAX Reloads:** *Yes or No?* Should search results use AJAX to display without reloading the page?

h. **New Window for Results:** *Yes or No?* Should search results display in a new window or open in the same one? (Doesn't work with AJAX reloads)

      i.   **Order E-mail Confirmation:** *User Entered, Auto Entered (via attribute) or No?* Do visitors need to also enter the e-mail address associated with an order to be able to view order information?

      j.   **Show Editor Helper:** *Yes or No?* Should the shortcode builder be shown above the WordPress page/post editor, in the toolbar buttons?

2. Premium

    a.   **Days to Save Statistics:** How many days should statistics be saved for?

    b.   **Set Access Role:** Who should have access to the "Status Tracking" admin menu?

    c.   **WooCommerce Integration:** *Yes or No?* Should WooCommerce orders be automatically created inside of the Status Tracking plugin? (Only works for new orders)?

    d.   **Status Tracking Graphic:** *Default, Streamlined, Sleek, Minimalist or Round?* Which tracking graphic should be displayed, if the graphic is being used for your orders.

    e.   **Mobile Stylesheet:** *Yes or No?* Should the mobile stylesheet for the plugin be included, so that the tracking form better fits mobile device screens?

    f.   **Customer Notes Email:** What email, if any, should be sent to the administrator when the customer note on an order is updated?

    g.   **Customer Order Email:** What email, if any, should be sent to the administrator when a new customer order is created?

3. Payment [Premium]

    a.   **Allow Order Payment by PayPal:** *Yes or No?* Should order payment be possible via PayPal?

    b.   **Default Post-Payment Status:** What status, if any, should an order be set to after payment is received?

    c.   **PayPal Email Address:** If PayPal payments are possible, what e-mail address is associated with the PayPal account?

    d.   **Pricing Currency:** What currency are your orders priced in?

    e.   **"Thank You" Page URL:** What page should customers be taken to after successfully completing a PayPal payment?

4. Zendesk [Premium]

    a.   **Turn on Zendesk Receiver:** *Yes or No?* Should the plugin listen for new tickets from Zendesk?

          Check out our [tutorial on setting up Status Tracking-Zendesk integration](#).

    b.   **Zendesk API Key (optional):** The (optional) key you're using to make sure that fake tickets can't be created by a 3rd party.

5. Labelling [Premium]

Labelling allows you to replace the default text on the status tracking plugin. Enter value in any of the fields that you need to change and click *Save Changes*.

6. Styling

The styling feature allows you to customize the look and appearance of your status tracking plugin to fit to your native WordPress theme.

Shortcodes & Attributes

The basic OTP shortcode is [tracking-form], which you can add to any page/post. There are also shortcodes for customers, sales reps and accepting orders from visitors.

1. [tracking-form]

a. Function

To display the tracking form.

b. Description

The tracking form is a form that contains two fields, the order number and the order e-mail address. Upon submitting the form, the customer should be able to access the information concerning the particular order searched.

c. Example

[tracking-form]

d. show_orders attribute

Use this attribute to display all the orders that have been entered. The attribute is taken by the tracking-form shortcode. The customer is allowed to enter a single order or a list of orders to be displayed, therefore if you set the attribute to "Yes", it will display all the orders entered, e.g:

[tracking-form show_orders='Yes']

2. [customer-form]

a. Function

To display the customer form.

b. Description

The customer form includes all the orders of a specific customer. So, if logged into your website, the customer should be able to access a table with all of their orders and their current status. If the customer is not yet logged in, there will be two fields to fill in to track the orders: customer ID number and customer e-mail (email field will only show if email confirmation is set to "User Entered".

c. Example

[customer-form]

3. [sales-rep-form]

a. Function

To allow a sales rep to see all orders assigned to them.

b. Example

[tracking-form show_orders='Yes']