



Module 10

Orders

Module 10: Orders

Introduction

You can develop a successful order management strategy by using tools that can streamline the process.

In this module, you will configure order management settings, explore order management basics, create manual orders, ship orders, and use order management tools to communicate with shoppers.

Learning Objectives

After completing this module, you should be able to:

- Enable order notification emails, order invoice emails, or both to be sent when an order is placed
- Change the starting order number
- Locate and organize orders in the BigCommerce control panel
- Print invoices and packing slips
- Determine which order statuses trigger email updates to shoppers
- View customer comments on an order
- Make internal notes on an order
- Create a custom order status label
- Create a manual order
- Create a draft order
- Archive an order
- Identify three ways to attach shipping tracking numbers to orders
- Describe how USPS by Endicia can be used to print shipping labels from the BigCommerce control panel
- Create a shipment for an order while updating the customer with the tracking number
- Delete a shipment
- Identify apps that can print shipping labels
- Send and receive Order Messages
- Submit and process a Return Request
- Complete a line item refund

Lessons

This module includes the following lessons:

Lessons
Lesson 1: Settings, Order Status and Order Notifications
Lesson 2: Managing Orders Basics
Lesson 3: Advanced Order Management
Lesson 4: Creating Shipments, Shipping Labels, and Tracking Numbers
Lesson 5: Order Messages & Return Requests

Orders Lesson 01:

Settings, Order Status and Order Notifications

❏ Introduction

When an order is placed with your store, you can determine how you're notified and what information is included.

Configuring your order settings and notifications boosts your operational efficiency by getting the right information in front of the eyes that need it quickly.

In this lesson, you will set up order notifications and change the starting order number.

❏ Learning Objectives

After completing this lesson, you should be able to:

- Enable order notification emails, order invoice emails, or both to be sent when an order is placed
- Change the starting order number

❏ Content

This lesson includes the following content:

Lessons
Lab Activity: Settings and Order Notifications

❏ Reference

This lesson may reference the following content

Lessons
KB Article: Order Notifications https://support.bigcommerce.com/articles/Public/Order-Notifications/
KB Article: Understanding Order IDs > Starting Order Number https://support.bigcommerce.com/articles/Public/Order-ID/#start-id
KB Article: Customer Order Notifications https://support.bigcommerce.com/articles/Public/Customer-Order-Notifications/

Build-A-Store: Settings and Order Notifications

Duration: 5 minutes

In this lab you will...

- Test then disable Email Order Notifications
 - Enable Forward Order Invoice
 - Change the starting order number
-

Complete These Steps

1. **Test** then **disable** Email Order Notifications

- Navigate** to *Advanced Settings > Order Notifications*
- Click** the *Email Message* tab
- If necessary, **update** the email address
 - If you cannot receive messages sent to the address in the *Email Address* field, **type** an address where you can receive messages into this field
 - Click** the *Save* button
 - Click** the *Email Message* tab
- Click** the *Test Notification Method* link
- Click** the *Close Window* button in the confirmation
- Click** the *General Settings* tab
- Uncheck** *Email Message*
- Click** the *Save* button



In the next steps, you will configure the store to forward a copy of the invoice to you. To prevent receiving both an invoice email and an order notification email, Email Order Notifications are disabled.

2. **Enable** Forward Order Invoices

- Navigate** to *Store Setup > Store Settings*
- Click** the *Miscellaneous* tab
- Check** *Forward Order Invoices*
- Type** one or more email addresses into the exposed text field
 - If using more than one email address, **separate** them with commas
- Click** the *Save* button

3. **Change** the starting order number

- Click** the *Miscellaneous* tab



Some merchants need to ensure all of their order numbers from their website are prefixed with a specific number. Here, we will assume all orders from the website must be prefixed with 1234. We also want to ensure the store can take at least 1,000,000 orders before needing to update the prefix.

- Type** 1234000001 into the *Starting Order Number* text field
- Click** the *Save* button

Orders Lesson 02:

Managing Orders Basics

❏ Introduction

BigCommerce gives you easy access to features that organize orders and perform common operations like printing packing slips and making internal notes. That way, you can keep orders and fulfillment organized.

In this lesson, you will locate orders, print invoices, and make notes on orders.

❏ Learning Objectives

After completing this lesson, you should be able to:

- Locate and organize orders in the BigCommerce control panel
- Print invoices and packing slips
- Determine which order statuses trigger email updates to shoppers
- View customer comments on an order
- Make internal notes on an order
- Create a custom order status label

❏ Content

This lesson includes the following content:

Lessons
Video: Order Management
Lab Activity: Managing Orders Basics

❏ Reference

This lesson may reference the following content

Lessons
KB Article: Viewing Orders https://support.bigcommerce.com/articles/Public/Orders/
KB Article: Invoices https://support.bigcommerce.com/articles/Public/Invoices
KB Article: Printing Packing Slips https://support.bigcommerce.com/articles/Public/Printing-Packing-Slips/
KB Article: Order Statuses > Order Statuses https://support.bigcommerce.com/articles/Public/Order-Statuses/#order-statuses
KB Article: Using Order Actions https://support.bigcommerce.com/articles/Public/Using-Order-Actions/

Video: Order Management

Video

Watch the *Order Management* video on YouTube: <https://youtu.be/xBhPtXAs7Pg>

Notes

Use the area below for writing down any notes or key takeaways from the video:

Build-A-Store: Managing Orders Basics

Duration: 15 minutes

In this lab you will...

- Ensure Order Comments are enabled
- Place an order
- View the order
- Print Order Invoice
- Print Packing Slip
- Make Staff Notes
- Create a custom order status label

Prerequisites

1. *Build-A-Store: Add Products part 1*
2. *Build-A-Store: Shipping Zones*
3. *Build-A-Store: Shipping Methods*
4. *Build-A-Store: Offline and Test Payment Methods*

Complete These Steps

1. **Ensure** Order Comments are enabled

- a. **Navigate** to *Advanced Settings > Checkout*
- b. **Enable** *Order Comments*
- c. **Click** *Save*

Checkout Type: ☒ Optimized one-page checkout (Recommended) [Learn more](#) ?
☐ One-page checkout ?
☐ Custom one-page checkout (for developers) ?
☐ Klarna Checkout (US merchants only) [Learn more](#) ?

Enable Guest Checkout? ☒ Yes, enable guest checkout ?
☐ Create an account for customers who use guest checkout ?

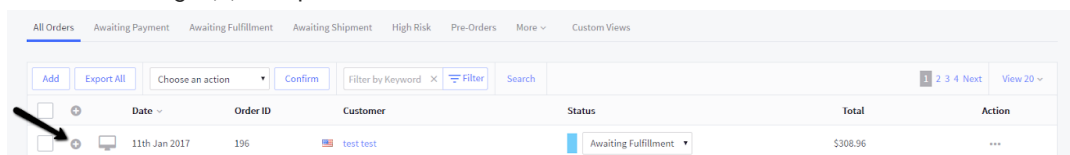
2. **Place** an order


- a. **Navigate** to your storefront
- b. **Add** a product to the cart
- c. **Checkout**
 - i. Use a real email address so you can view the order confirmation email
 - ii. Type some text into the *Order Instructions/Comments (Optional)* field
 - iii. Use the Test Payment Gateway payment method

Enable Order Comments? ☒ Yes, allow customers to enter comments with their order ?

3. **View** an order

- a. **Navigate** to *Control Panel*
- b. **Click** *Orders*
- c. **Click** the *Plus sign (+)* to expand order

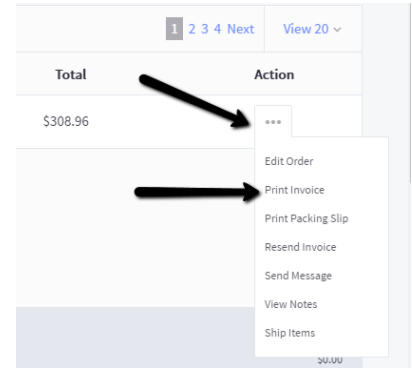


All Orders						
Awaiting Payment Awaiting Fulfillment Awaiting Shipment High Risk Pre-Orders More ▾ Custom Views						
<div><div>Add Export All Choose an action ▾ Confirm Filter by Keyword × Filter Search</div><div>1 2 3 4 Next View 20 ▾</div></div>						
	Date ▾	Order ID	Customer	Status	Total	Action
	11th Jan 2017	196	test test	Awaiting Fulfillment ▾	\$308.96	...

- d. **Locate** the text entered into the *Order Instructions/Comments (Optional)* field during checkout
- e. After reviewing the order details, **click** *subtraction (-)* sign to collapse the order details

4. **Print** an order invoice

- Click** the *Action* button (...)
- Click** *Print Invoice*
- If desired, **print** the invoice. Otherwise, **close** the print preview.



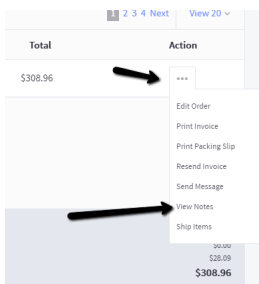
5. **Print** a packing slip

- Click** the *Action* button (...)
- Click** *Print Packing Slip*
- If desired, **print** the packing slip. Otherwise, **close** the print preview

What differences do you see between the Invoice and the Packing Slip?

6. **Make** Staff Notes

- Click** the *Action* button (...)
- Click** *View Notes*



- Type** some text into the *Staff Notes* field
- Click** *Save*

A screenshot of a modal form titled 'Order Comments and Notes'. It has a close button (X) in the top right corner. Below the title is a blue bar with the text 'Use the text boxes below to make notes on this order.' There are two text input fields: 'Order Comments' and 'Staff Notes'. The 'Order Comments' field has a placeholder text: 'Type any comments about this order here. The order comments will be visible on invoices printed from the store.' The 'Staff Notes' field has a placeholder text: 'Type any staff notes about this order here. Staff notes are only viewable in the store control panel and not viewable by customers.' At the bottom right of the modal are 'Cancel' and 'Save' buttons. An arrow points to the 'Save' button.

If an order has order comments, you will see this icon on the order summary:



If an order has staff notes when the View Orders page is loaded, you this icon on the order summary:



7. **Create** a custom order status label

- Navigate** to *Orders > Order Statuses*
- Click** the *Edit* button
- Delete** the text *Awaiting Shipment*
- Type** "Package ready to be picked up by FedEx" or another custom status label into the text field
- Click** the *Save* button
- Navigate** to *Orders > View*
- Click** the Status dropdown



Note that the custom order status label is now present in the dropdown

Orders Lesson 03:

Advanced Order Management

Introduction

For orders with payments that have already been arranged, you can create manual orders. For example, you can create a manual order for a customer who paid cash in person or gave you their credit card information over the phone. Alternatively, Draft Orders are an excellent way to send a quote or allow customers to pay for a telephone transaction without providing credit card details over the phone.

Using these tools, customer service and sales teams can be empowered to process orders for customers right in the BigCommerce control panel.

In this lesson, you will create a manual order and archive an order.

Learning Objectives

After completing this lesson, you should be able to:

- Create a manual order
- Create a Draft Order
- Archive an order

Content

This lesson includes the following content:

Lessons
Lab Activity: Manual, Draft & Archived Orders

Reference

This lesson may reference the following content

Lessons
KB Article: Creating a Manual Order https://support.bigcommerce.com/articles/Public/Creating-a-Manual-Order/
KB Article: Creating a Draft Order https://support.bigcommerce.com/articles/Public/Creating-a-Draft-Order/

Build-A-Store: Manual, Draft & Archived Orders

Duration: 13 minutes

In this lab you will...

- Create a manual order
- Create a Draft Order
- Archive an order
- Un-archive an order

Prerequisites

1. *Build-A-Store: Add Products part 1*
 2. *Build-A-Store: Customer Accounts*
 3. *Build-A-Store: Shipping Methods*
 4. *Build-A-Store: Offline and Test Payment Methods*
-

Complete These Steps

1. **Create** a manual order

- a. **Navigate** to *Orders > Add*
- b. **Complete** the *Customer Info* step
 - i. With *Existing Customer* selected, begin **typing** the name on a saved customer account with at least one saved address
 - ii. When the customer's name appears below the text field, **click** the customer's name
 - iii. **Click** the *Use this address* link on a saved address

The screenshot shows a web form with two main sections: "Customer Information" and "Billing Information". In the "Customer Information" section, there are two radio buttons: "Existing Customer" (which is selected) and "New Customer". Below them is a search input field containing the text "Kevin Turk (kturk@example.com)". The "Billing Information" section contains two input fields for "First Name" (with "Kevin" entered) and "Last Name" (with "Turk" entered). To the right of these fields is a card for "Kevin Turk" with the address "1234 Main St, Austin, Texas, 78726, United States". A button labeled "Use this address" is highlighted with a black box on the card.

- iv. **Click** the *Next* button
- c. **Complete** the *Items in order* step
 - i. **Add** an existing product
 1. **Click** the *Browse Categories* button
 2. **Click** the category that contains the product you would like to add
 3. **Click** the product's name to highlight it
 4. **Click** the *Select* button
 - ii. **Add** a custom product
 1. **Click** the *Add a custom product* link
 2. **Type** a product name into the *Name* field
 3. **Type** a price into the *Manually set the price for this item* text field
 4. **Click** the *Add Item* button
 - iii. **Click** the *Next* button
 - d. **Complete** the *Shipping* step
 - i. **Click** the *Fetch shipping Quotes* link

- ii. **Click** a shipping quote to highlight it
- iii. **Click** the *Next* button
- e. **Complete** the *Payment* step
 - i. **Type** an amount less than the Subtotal into the *Discount Amount* field in the Order Summary
 - ii. **Select** *Test Payment Gateway* from the *Select...* dropdown

Finalize

Select...

Summary

Subtotal	\$49.00
Discount	-\$12.00
Shipping	\$5.00
Tax	\$3.46
Grand Total	\$45.46

Discount Amount

12 [Apply](#)

Coupon or Gift Certificate

[Apply](#)

- iii. **Type** any name into the *Cardholder's Name* field
- iv. **Type** 4111111111111111 into the *Credit Card No* field
- v. **Select** any date in the future for *Expiration Date*
- vi. **Click** the *Save & Process Payment* button

2. Create a Draft Order

- a. **Repeat** steps 1.a-1.d (i.e. return to the *Payment* step)
- b. **Complete** the *Payment* step
 - i. **Select** *Create Draft Order* from the *Select...* dropdown
 - ii. Click the *Save & Create Draft Order >>* button

[Save & Create Draft Order >>](#)



After saving a Draft Order, you will be brought to the Draft Orders page where you can retrieve the URL you will send to your customer to review the order and complete payment. You can always reach this page by navigating to *Orders > Draft Orders* in your control panel.

- c. **Copy** the URL in the *Draft Order URL* field

Draft Orders					
Date	Customer	Draft Order URL	Total	Status	Action
Mar 12th 2018	Patrick Puente	https://store-he1cd59g6l.mybigcommerce.com/cart.php?	\$45.46	ACTIVE	...



The URL will be valid for 29 days from time of creation. Customers will not be able to check out once it has expired and a new draft order will need to be created.

- d. **Visit** the Draft Order URL in a new browser window or tab.

3. Archive an order

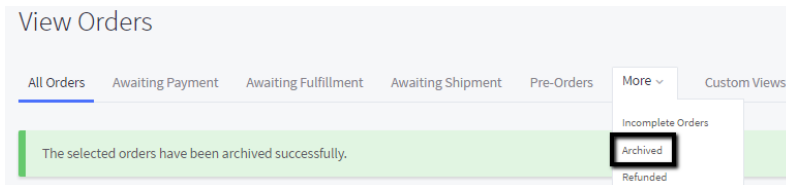


Cancelling and archiving an order will prevent its value from being including in analytical reporting. The status of an archived order cannot be changed, but they can be un-archived, if necessary.

- Navigate** to *Orders > View* in the control panel
- Click** the checkbox to the left of the new order's summary
- Select** *Archive Selected* from the *Choose an action* dropdown
- Click** the *Confirm* button
- Click** *Ok* in the confirmation

4. Un-archive an order

- From the *View Orders* page, **click** *More > Archived*



- Click** the checkbox to the left of the archived order's summary
- Select** *Un-archive Selected* from the *Choose an action* dropdown
- Click** the *Confirm* button

Orders Lesson 04:

Creating Shipments, Shipping Labels, and Tracking Numbers

❏ Introduction

BigCommerce integrates with many best-in-class applications that can print shipping labels like ShipStation, Stamps.com, and Ordoro just to name a few. Alternatively, BigCommerce can handle package tracking automatically using USPS by Endicia.

In this lesson, you will attach tracking numbers to orders, explore the USPS by Endicia integration for printing labels, manage shipments, and explore third-party shipping apps.

❏ Learning Objectives

After completing this lesson, you should be able to:

- Identify three ways to attach shipping tracking numbers to orders
- Describe how USPS by Endicia can be used to print shipping labels from the BigCommerce control panel
- Create a shipment for an order while updating the customer with the tracking number
- Delete a shipment
- Identify apps that can print shipping labels

❏ Content

This lesson includes the following content:

Lessons
Lab Activity: Create a Shipment

❏ Reference

This lesson may reference the following content

Lessons
KB Article: Printing Shipping Labels with USPS by Endicia https://support.bigcommerce.com/articles/Public/Shipping-Labels/
KB Article: Creating Shipments https://support.bigcommerce.com/articles/Public/Shipments/
App Listing: ShipStation https://www.bigcommerce.com/apps/shipstation/

Build-A-Store: Create a Shipment

Duration: 15 min

In this lab you will...

- Create a Shipment
- View the Shipment Email

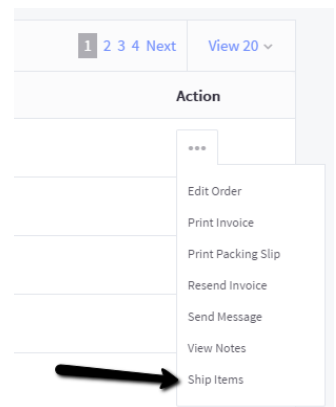
Prerequisites

1. *Build-A-Store: Managing Orders Basics*

Complete These Steps

1. Create a Shipment

- a. **Navigate** to *Orders > View Orders*
- b. **Locate** an order placed using an email address you can access
- c. **Click** the *Action* button (...)
- d. **Click** *Ship Items*
- e. **Select** *FedEx* in the *How would you like to ship?* select box
- f. **Type** an arbitrary number in the *Tracking ID* field
- g. **Type** a description such as “FedEx Ground Home Delivery” in the *Shipping Method Description* field
- h. **Ensure** *Update the order status to Shipped, and notify the customer via email* is checked
- i. **Click** *Create Shipment*



If USPS is the shipping provider, shipping labels can be printed using the same workflow and the USPS by Endicia integration. Check out the “Printing Shipping Labels with USPS by Endicia” KB article for more information: <https://support.bigcommerce.com/articles/Public/Shipping-Labels/>

To print shipping labels for other carriers, check out apps like ShipStation or Stamps.com in the BigCommerce App Marketplace at <https://www.bigcommerce.com/apps>

2. View the Shipment Email

- a. **Locate** the *Order Has Been Updated* email triggered when the order status was updated
- b. **Click** The link to be taken to the carrier’s website to track the package



Since the tracking number entered in step 1.f was arbitrary, you will likely receive an error on the shipping provider’s website. But, if this is a real tracking number, this link can be used to track the package.

Order Status Changed

Hi test

An order you recently placed on our website has had its status changed.

[Click here to see the new status of your order](#)

Order Details

Order Total:	\$1.95 USD
Date Placed:	17th Jan 2017
Payment Method:	Test

Shipment Tracking Numbers / Links

- [TEST456456TEST](#) (None)

Please visit the link below for important information about tracking your package.

[How do I track my package?](#)

[Other common shipping and delivery questions](#)

[Click here to view the status of your order](#) (login required)

Orders Lesson 05:

Order Messages, Return Requests & Refunds

❏ Introduction

Refunds and return requests are an important part of running an online store and offer another opportunity to provide superior customer service. BigCommerce makes it easy for your customers to request a refund and for you to provide the refund.

In this lesson, you will use order messages to communicate with shoppers then submit and process return requests

❏ Learning Objectives

After completing this lesson, you will be able to:

- Send and receive Order Messages
- Submit and process a Return Request
- Submit an order refund

❏ Content

This lesson includes the following content:

Lessons
Lab Activity: Order Messages
Lab Activity: Return Requests
Lab Activity: Refunds

❏ Reference

This lesson may reference the following content

Lessons
KB Article: Using Order Actions > Send Message https://support.bigcommerce.com/articles/Public/Using-Order-Actions/#message
KB Article: Processing Returns https://support.bigcommerce.com/articles/Public/Processing-Returns/
KB Article: Processing Refunds https://support.bigcommerce.com/articles/Public/Processing-Refunds/

Build-A-Store: Order Messages

Duration: 10 minutes

In this lab you will...

- As a shopper, send an order message
- As a merchant reply to the order message
- As a shopper , Review the order message email

Prerequisites

1. *Lab Activity: Customer Accounts*
 2. *Lab Activity: Managing Orders Basics*
-

Complete These Steps

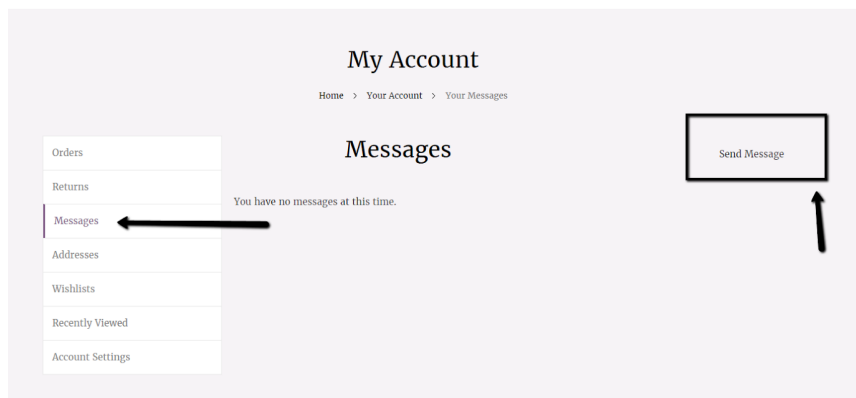
1. As a shopper, **send** an order message

- a. **Login** as customer
 - i. This customer must use a real email address you can check
 - ii. This customer must have at least one order associated with it



If you do not have any orders associated with a customer account that uses your real email address yet, log in as a customer and place an order.

- b. **Navigate** to the *My Account* page on the storefront (/account.php)
- c. **Click** *Messages* in the account navigation (/account.php?action=inbox)
 - i. Depending on your theme, you may need to **click** the *Send Message* link on this page to see the message form used in the next step



- d. **Select** an order associated with this customer from the *Order* menu
- e. **Type** a *subject* and *message*

- f. **Click** *Send Message*

2. As a merchant, **send** an order message

- Log into** the store's control panel
- Navigate** to *Orders > View Orders*
- Locate** the order with the *message* icon



In addition to the message icon on the View Orders page, the store administrator email address should receive a notification of the new message and an event should appear on the dashboard in the control panel indicating there is a new message.

- Click** the *Message* Icon
- Click** the *Send Message* button
- Type** some text in the *message* field and, if desired, update the *subject* field.
- Click** the *Send* button

	Subject	Message	From	Date Sent	Status	Action
<input type="checkbox"/>	This is a cool order	Hey merchant, This is a cool order. It's so cool, in fact, I wanted to send you a message. Let's chat sometime!	[Customer]	Jan 23rd 2017 @ 6:23 PM	Unread (Mark as Read)	...

3. As a shopper, **review** the order message email

- Log into** the email account associated with the customer account
- Open** the message sent by the store

New Reply to your Order Message

*** This is an automated message, please do not reply ***

Brand New Store has sent you a message about your order.

Message:

Hey Chef, here's your order message!

To reply [click here.](#)

- Click** the *Click Here* link
 - If necessary, **log into** the customer account again
- View** the message sent by the merchant

Can customers that have not created an account send or receive Order Messages?

Build-A-Store: Return Requests

Duration: 10 minutes

In this lab you will...

- Configure settings for Returns
- Submit a return request as a shopper
- Process the return request as a merchant

Prerequisites

1. *Lab Activity: Customer Accounts*
2. *Lab Activity: Managing Orders Basics*

Background

The procedures for receiving and processing returns vary between merchants. This lab explores the Return Request tools provided by BigCommerce.

Complete These Steps

1. **Configure** settings for Returns

- a. **Ensure** returns are enabled
 - i. **Navigate** to *Advanced Settings > Returns*
 - ii. **Ensure** *Enable Returns System?* is enabled



The Return Instructions are instructions that should be shown to a customer after they've successfully created a new return request. For Example:

Please package and return your items to:

Smith's Company
123 Smith Street
Smithville.

Ensure your returns authority number is clearly marked on the package.

- b. **Type** some instructions to display to shoppers that submit return requests in the *Return Instructions* text field



Return reasons are reasons a customer should be able to select when submitting a return request. For example, a store that sells fragile products may want to add "damaged during transit".

- c. If desired, **type new** or **edit existing** return reasons in the *Return Reasons* field



Return actions are actions that a customer should be able to select when submitting a returns request. For example, if a merchant offers store credit but not refunds, the merchant may want to remove “refund” from this list.

If this field is left blank, it will not be shown on the return request page.

- d. If desired, **type new** or **edit existing** return actions in the *Return Actions* field
e. **Ensure** *Allow Store Credits?* and all notification settings are enabled

2. **Submit** a return request as a shopper



To submit a return request, the order must be in “Shipped” or “Completed” status. If you do not have an order associated with a customer account in either “Shipped” or “Completed” status, update the status on one of your orders now.


- a. **Log into** the storefront as a customer with an order in *Shipped* or *Completed* status
b. **Navigate** to where a customer can submit a *return request*
i. **Navigate** to the *My Account* page (/account.php)
ii. **Navigate** to the *Orders* page (/account.php?action=order_status)

Home / Your Account / Your Orders

Orders

[Orders](#) [Returns](#) [Messages \(0\)](#) [Addresses](#) [Wish Lists \(0\)](#) [Recently Viewed](#) [Account Settings](#)

Orders

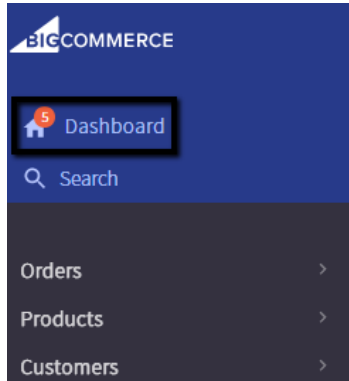
	Order #125 1 product totaling \$109.33	COMPLETED Return Items?
	ORDER PLACED Jan 23rd 2017	LAST UPDATE Jan 23rd 2017

Note: the “My Account” page on your store may look different depending on your theme

- c. **Click** the *Return items* link (or comparable link for your theme)
d. **Create** the *return request*
i. **Select** the quantity of products to return
ii. **Select** the desired *Return Reason*
iii. **Select** the desired *Return Action*
iv. If desired, **type** a comment
e. **Click** the *Submit* button

3. **Process** the return request as a merchant

- a. **Locate** the return request
 - i. **Navigate** to the dashboard in the control panel

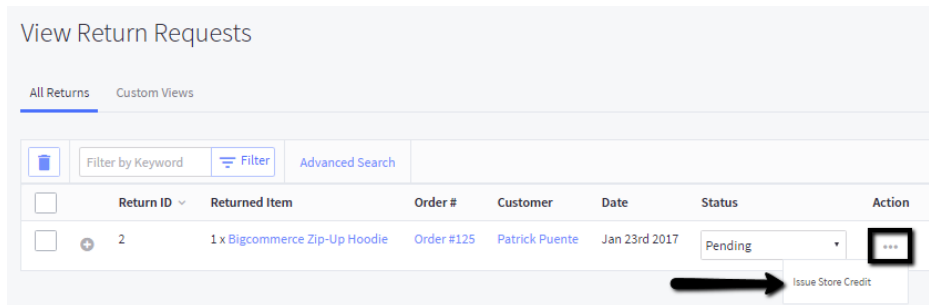


- ii. **Locate** the text “There is 1 pending return request” in the Events section
 - iii. **Click** the *return request* link



Alternatively, you can view return requests by navigating to Orders > Returns

- iv. **Choose** a new status for the return request from the *Status* dropdown
 - v. **Click** the *Action Button > Issue Store Credit*



Updating the status of the return request should trigger an email notification to the customer. If you did not want to automatically return request status update emails to shoppers, how could you suppress these emails?

Build-A-Store: Refunds

Duration: 12 minutes

In this lab you will...

- Place an order using offline payment method
- Complete a line item refund

Prerequisites

1. *Lab Activity: Payment Gateways*
2. *Lab Activity: Adding Products*
3. *Lab Activity: Managing Orders Basics*

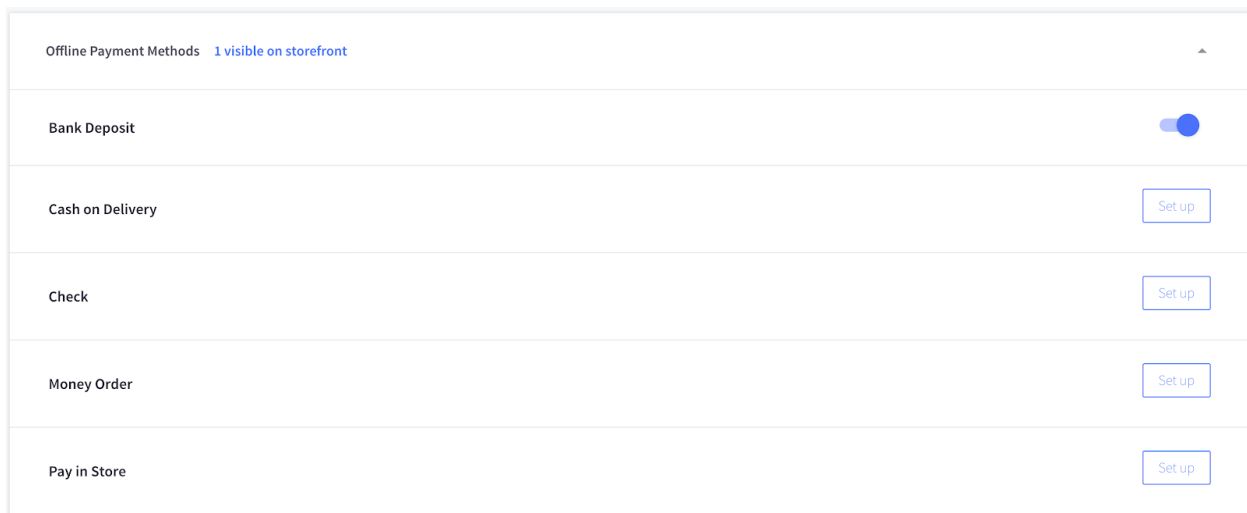
Background

Our line item refund functionality will help a merchant determine the average return rate (over the past 365 days) for a customer, perform multiple partial refunds on the same order, and even refund additional line items such as gift wrapping or handling fees.

Complete These Steps

1. **Complete** an order using an offline payment method

- a. **Navigate** to *Store Setup > Payments*
- b. **Verify** offline payment method is enabled
 - i. *If you do not have an offline payment method active:* **Click** *Offline Payment Methods*
 - ii. **Click** the *Setup* button to enable any one of the viable options (Bank Deposit, Cash on Delivery, Check, Money Order or Pay in Store)
 - iii. **Click** *All Countries* or your current country from the list of *Available Countries*, to enable the payment option at checkout
 - iv. **Click** *Save*

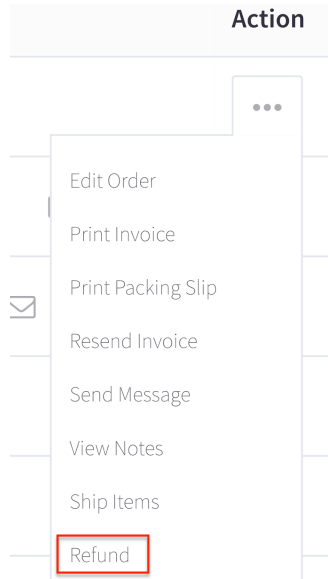


In the image above displays the *Bank Deposit* offline payment method enabled. The user has the option to *Set up* additional offline payment methods.

- c. **Navigate** to your Storefront, add multiple items to the cart, and check out using the offline payment method

2. Complete a line item refund

- a. **Navigate** to your store's control panel
- b. **Navigate** to the Orders page, *Orders > View*
- c. **Navigate** to the order you placed using the offline payment method
- d. **Click** the *Status* drop down menu and set the order to *Completed*
- e. **Access** the *refund* options for the order that was placed on your site with multiple items
 - i. **Click** the ellipses found under the action column for the order



- ii. **Click Refund**
- f. **Click** to *refund individual items*, under *Refundable Items*
- g. **Add** a few but not all items in the order to be refunded, from the *Units to Refund* column (*notice the option to refund shipping as well*)
- h. **Click Continue** at the bottom right of the screen
- i. **Click** the offline payment gateway you used to process the order or *Store Credit*, under *Refund Method*
- j. **Confirm** the Refund
- k. **Verify** the items that were refunded are now showing a slash through them in the *Order Details*

~~1x "Team on a Mission" Soft Tee~~
SKU-E8E4E865



In order to process a refund, the order must have been taken via a live payment gateway or payment gateway in sandbox mode. Performing a refund for a transaction processed via offline payment method can be done, once the transaction has been marked as Completed