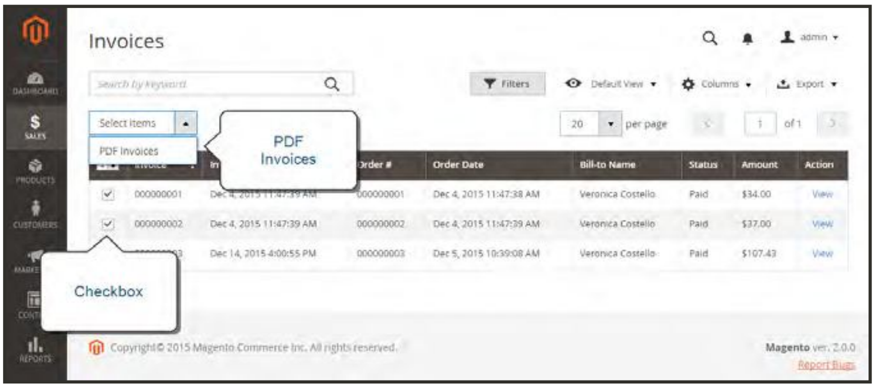
Printing Multiple Invoices

Invoices can be printed individually or as a batch. However, before an invoice can be printed, it must first be generated for the order. To add your logo and address to the invoice, see: Preparing Your Invoice Logo.

> To view or print the PDF, you must have a PDF reader. You can download Adobe Reader at no charge.

To print multiple invoices:

1. On the Admin sidebar, tap **Sales.** Then under **Operations**, choose **Invoices.**
2. In the **Invoices** grid, mark the checkbox of each invoice to be printed.
3. Set the **Actions** control to "PDF Invoices."



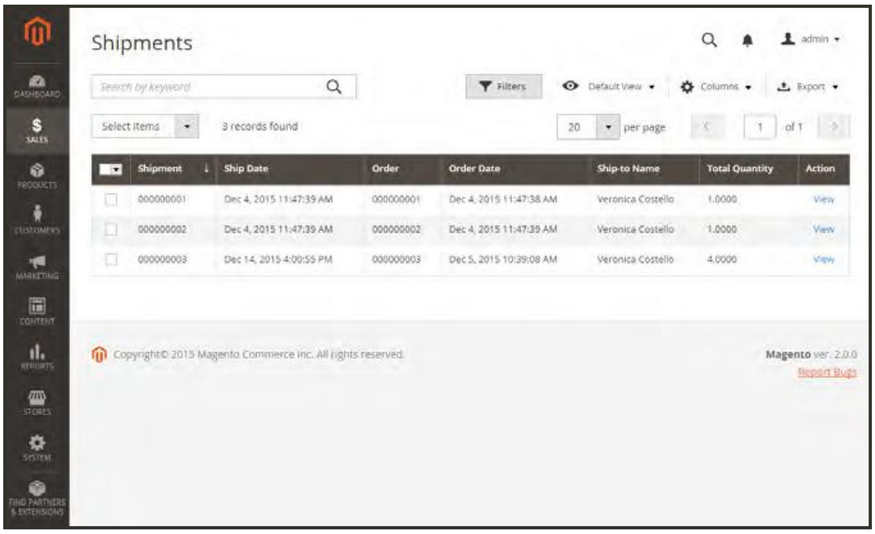
Print Invoices

The invoices are saved in a single PDF file that can be sent to a printer, or saved.

CHAPTER 53:

Shipments

The Shipments grid lists the shipment record of all invoices that have been prepared for shipping. A shipment record can be generated when an order is invoiced.



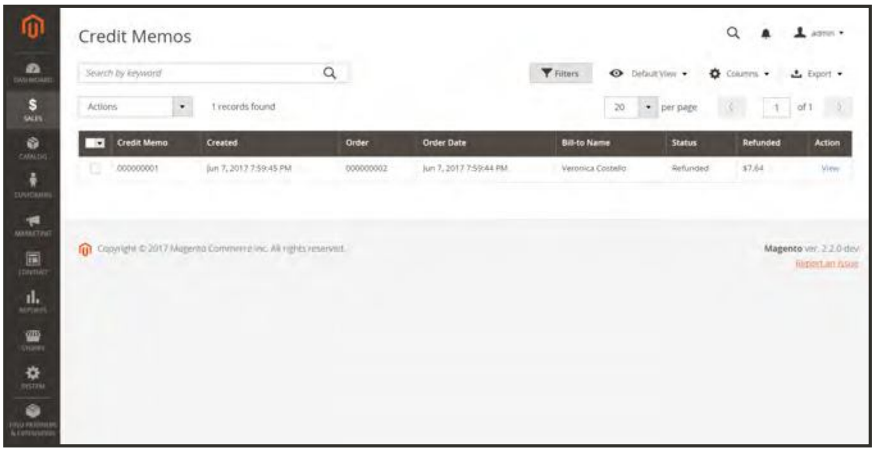
Shipments

CHAPTER 54:

Credit Memos

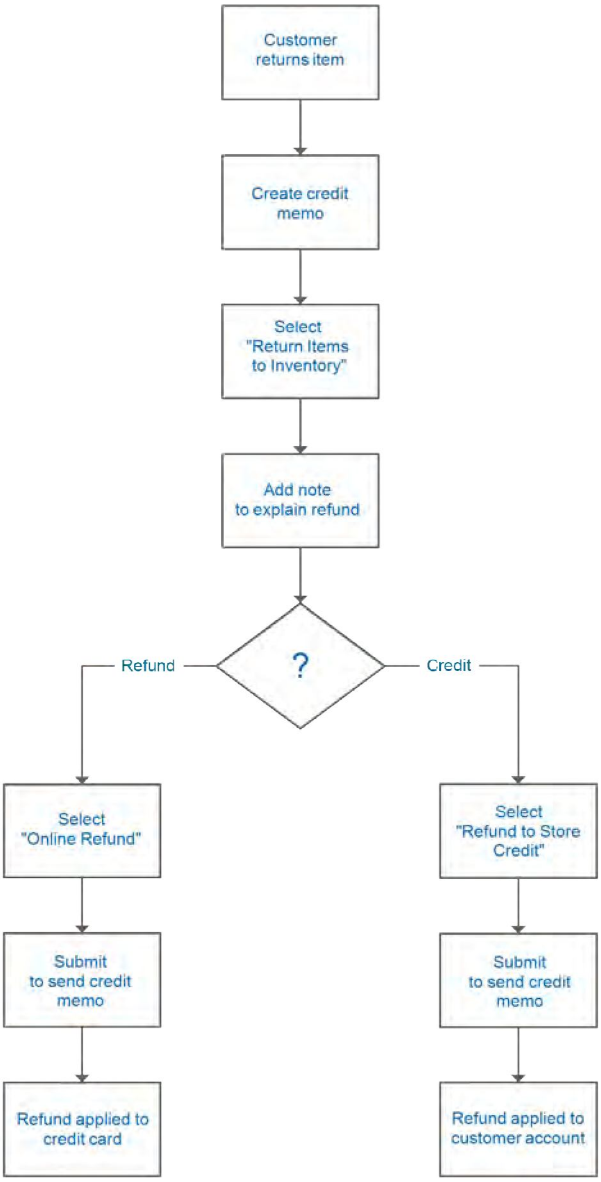
A credit memo is a document that shows the amount that is due the customer for a full or partial refund. The amount can be applied toward a purchase, or refunded to the customer. You can print a credit memo for a single order, or for multiple orders as a batch. Before a credit memo can be printed, it must first be generated for the order. The credit memo grid lists the credit memos that have been issued. to customers.

The methods that are available to issue refunds depends on the payment method that was used for the order. Orders that were paid by credit card through a payment gateway can be refunded online, by the payment processor. Orders that were paid COD or by check or money order are refunded offline.



Credit Memos

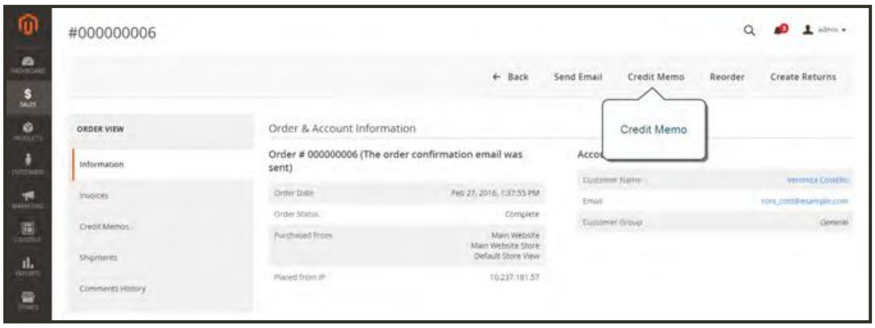
Product Return Workflow



Product Return Workflow

Issuing a Credit Memo

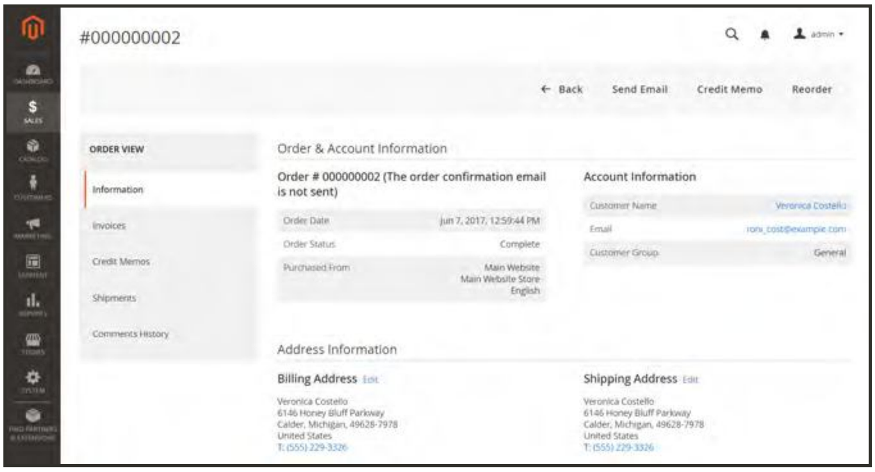
Before a credit memo can be printed, it must first be generated for the order. If you create a credit memo for an order that includes gift options, the refund for the gift wrapping and/or printed card appears in the Refund Totals section of the credit memo. To exclude these costs from the amount to be refunded, enter the amount as an Adjustment Fee. If multiple credit memos are issued for the same order, the refund for gift options appears in only the first credit memo.



Create Credit Memo

To issue a credit memo:

1. On the Admin sidebar tap **Sales.** Then, choose **Orders.**
2. Find the completed order in the grid. Then in the **Action** column, click the **View** link to open the order.
3. In the button bar at the top of the page, tap **Credit Memo**. (The button appears only after an order is invoiced.)



Create Credit Memo

The New Credit Memo page looks similar to the completed order page, with an Items to Refund section that lists each item from the invoice.

Items to Refund

> If an online payment method was used, you will not be able to edit these fields.

4. Do one of the following:
   - If the product is to be returned to inventory, mark the **Return to Stock** checkbox.
   - If the product will not be returned to inventory, leave the checkbox blank.

   The Return to Stock checkbox appears only if inventory Stock Options are set to "Decrease Stock When Order Is Placed."

5. Complete the following:

   a. In the **Qty to Refund** box, enter the number of items to be returned. Then, press the **Enter** key to record the change. The Update Qty's button becomes active.

   b. Enter **0** for the **Qty to Refund** of any items that are not to be refunded.

   c. Tap **Update Qty's** to recalculate the total. (The amount to be credited cannot exceed the maximum amount that is available for refund.)

6. In the **Refund Totals** section, do the following, as applicable:

   a. In the **Refund Shipping** field, enter any amount that is to be refunded from the shipping fee. This field initially displays the total shipping amount from the order that is available for refund. It is equal to the full shipping amount from the order, less any shipping amount that has already been refunded. Like the quantity, the amount can be reduced, but not increased.

   b. In the **Adjustment Refund** field, enter a value to be added to the total amount refunded as an additional refund that does not apply to any particular part of the order (shipping, items, or tax). The amount entered cannot raise the total refund higher than the paid amount.

   c. In the **Adjustment Fee** field, enter a value to be subtracted from the total amount refunded. This amount is not subtracted from a specific section of the order such as shipping, items, or tax.

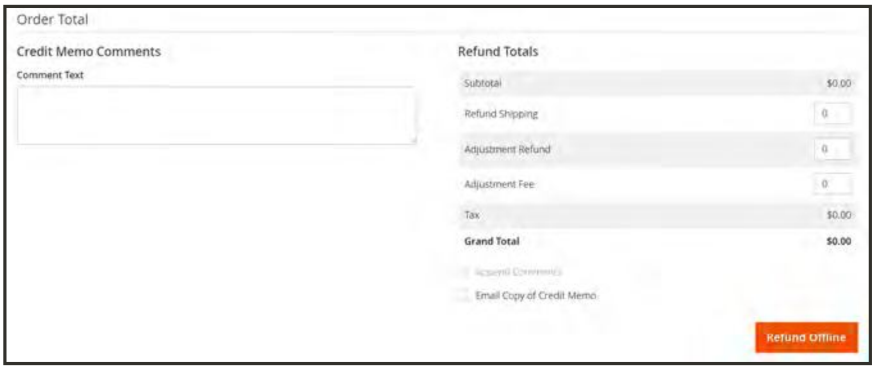
   d. If the purchase was paid with store credit, mark the **Refund to Store Credit** checkbox. The amount will be credited to the customer's account balance.

   e. To add a comment, enter the text in the **Credit Memo Comments** box.

   f. To send an email notification to the customer, mark the **Email Copy of Credit Memo** checkbox.

g. To include the comments you have entered in the email, mark the **Append Comments** checkbox.

The status of a credit memo notification appears in the completed credit memo next to the credit memo number.



Refund Totals

7. To complete the process and generate the credit memo, choose one of the following refund option buttons, according to the payment type:
    - Refund Offline
    - Refund Online
8. To add a comment to the completed credit memo, scroll down to the Comments History section, and enter the comment in the box. A history of all activity related to the order is listed below.
    - To send the comment to the customer by email, mark the **Notify Customer by Email** checkbox.
    - To post the comment in the customer's account, mark the **Visible on Frontend** checkbox.

    Then, tap **Submit Comment** .
9. In the panel on the left, choose **Credit Memos.** Any credit memos that are associated with this order appear in the list.

Field Descriptions

FIELD	DESCRIPTION
ORDER & ACCOUNT INFORMATION	
Order Number	The order number appears in the Order & Account Information, followed by a note that indicates if the confirmation email was sent.
Order Date	The date and time the order was placed.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Order Status	Indicates the order status as “Complete.”
Purchased From	Indicates the website, store, and store view where the order was placed.
Placed from IP	Indicates the IP address of the computer from which the order was placed.
Account Information	
Customer Name	The name of the customerwho placed the order. The Customer Name is linked to the customer profile.
Email	The email address of the customer. The email address is linked to open a new email message.
Customer Group	The name of the customer group to which the customer is assigned.
ADDRESS INFORMATION	
Billing Address	The name of the customer who placed the order, followed by the billing address, telephone number and VAT, if applicable. The telephone number is linked to autodial on a mobile device.
Shipping Address	The name of the person to whose attention the order should be shipped, followed by the shipping address and telephone number. The telephone number is linked to autodial on a mobile device.
PAYMENT & SHIPPING METHOD	
Payment Information	The method of payment to be used for the order, and purchase order number, if applicable, followed by the currency that was used to place the order.
Shipping & Handling Information	The shipping method to be used, and any handling fee that is applicable.
ITEMS TO REFUND	
Product	The product name, SKU, and options if applicable.
Price	The purchase price of the item.
Qty	The quantity ordered.

Field Descriptions (cont.)

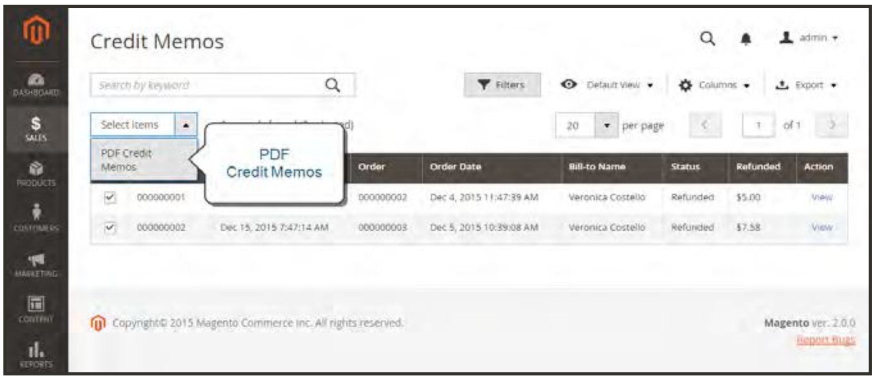
FIELD	DESCRIPTION
Return to Stock	Checkbox that indicates if the returned item is to be returned to stock.
Qty to Refund	Indicates the number of units returned of the product.
Subtotal	The subtotal is the purchase price multiplied by the quantity of product units returned.
Tax Amount	The amount of tax that applies to the returned item as a decimal value.
Tax Percent	The percentage of tax applied to the returned item as a percentage.
Discount Amount	Any discount that applies to the returned item.
Row Total	The line item total, including applicable taxes that are due for the returned product level, less discounts.
ORDER TOTAL	
Credit Memo Comments	
Comment Text	A text box that is used to enter a comment to the customer about the credit memo.
Refund Totals	
Refund Shipping	The shipping amount to be refunded.
Adjustment Refund	An amount that is added to the total amount refunded as an additional refund that does not apply to any particular part of the order, such as shipping, items, or tax. The amount entered cannot raise the total refund higher than the amount paid.
Adjustment Fee	An amount that is subtracted from the total amount refunded, such as a restocking fee, or an amount that is related to gift options.
Grand Total	The total amount to be refunded
Append Comments	Checkbox that determines if comments are included in the credit memo.
Email Copy of Credit Memo	Checkbox that determines if a copy of the credit memo is emailed.
REFUND BUTTONS	

Field Descriptions (cont.)

FIELD	DESCRIPTION
The payment method used for the order determines that refund buttons that are available for a credit memo.	
Refund Online	If the original purchase was paid by credit card through a payment gateway, the refund amount is managed by the payment processor. To manage refunds, see the documentation provided by your payment provider.
Refund Offline	If the original purchase was paid by check or money order, the refund is paid directly to the customer, by issuing a check, gift card, or cash if you have a brick and mortar storefront. The credit memo serves as a record of the offline transaction.

Printing Credit Memos

To print or view the completed credit memo, you must have a PDF reader installed on your computer. You can download Adobe Reader at no charge.



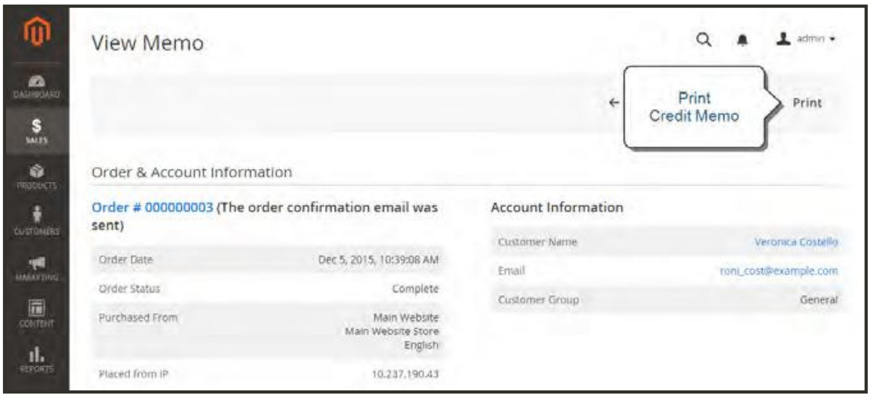
Credit Memos

To print a credit memo:

1. On the Admin sidebar, tap **Sales.** Then under **Operations**, choose **Credit Memos.**
2. Use one of the following methods to print the credit memo:

Method 1: Print current credit memo

1. In the grid, open the credit memo.
2. Tap **Print**.



Print Credit Memo

Method 2: Print multiple credit memos

1. In the list, mark the checkbox of each credit memo that you want to print.
2. Set the **Actions** control to “PDF Credit Memos. Then, tap **Submit**.
3. When prompted, do one of the following:
   - To save the document, tap **Save**. Then, follow the prompts to save the file to your computer. When the download is complete, open the PDF in Adobe Reader, and print the document.
   - To view the document, tap **Open**. The printed-ready PDF credit memo opens in Adobe Reader. From here, you can either print the credit memo or save it to your computer.

CHAPTER 55:

Billing Agreements

The Billing Agreements grid lists all billing agreements between your store and its customers. The store administrator can filter the records by the customer or billing agreement information including billing agreement reference ID, status, and creation date. Each record includes general information about the billing agreement, and all sales orders that have used it as a payment method. The store administrator can view, cancel, or delete customer's billing agreements. A canceled billing agreement can be deleted only by the store administrator.

Billing Agreements

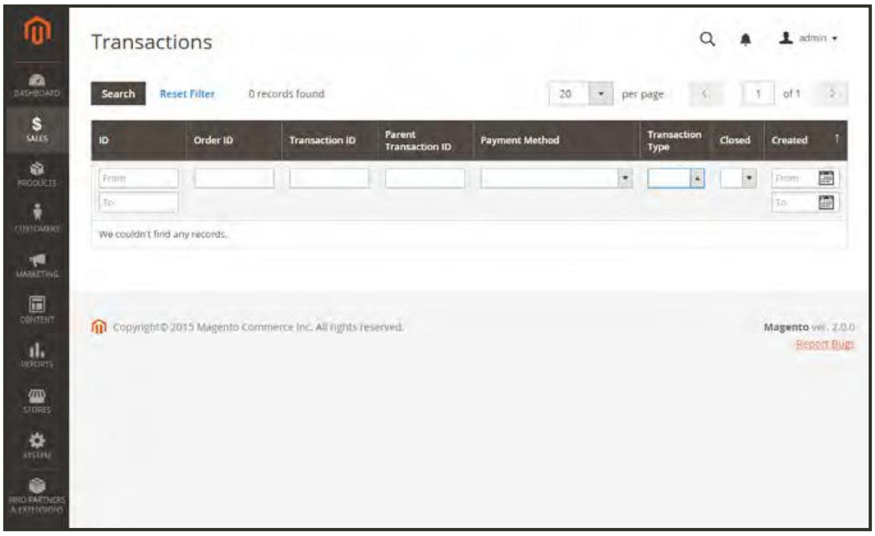
CHAPTER 56:

Transactions

The Transactions grid lists all payment activity that has taken place between your store and a payment system, and provides access to more detailed information.

To view transactions:

On the Admin sidebar, tap **Sales.** Then under **Operations**, choose **Transactions.**



Transactions