**CHAPTER 47:**

# Sales Menu

The Sales menu lists transactions according to where they are in the order workflow. You might think of each of option as a different stage in the lifetime of an order.



*Sales Menu*

## To display the Sales menu:

On the Admin sidebar, tap  Sales .

# Menu Options
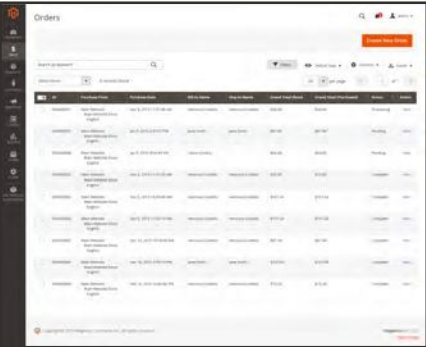


## Orders

When an order is placed, a sales order is created as a temporary record of the transaction. Payment has not been processed, and
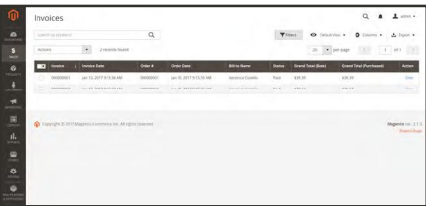the order can still be canceled.



## Invoices

An invoice is a record of the receipt of payment for an order. Multiple invoices can be created for a single order, each with as many, or as few of the purchased products that you specify. Depending on the payment action, payment can be automatically captured when the invoice is generated.
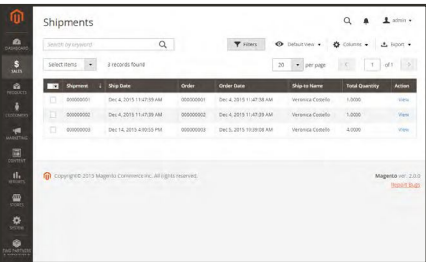


## Shipments

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be associated with a single order, until all of the products in the order are shipped.
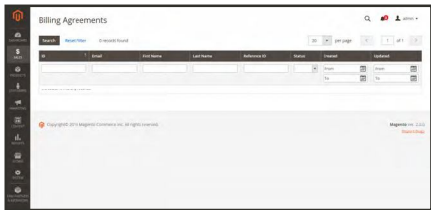
## Billing Agreements

A billing agreement is similar to a purchase order, except that it isn't limited to a single purchase. During checkout, the customer chooses Billing Agreement as the payment method. A billing agreement streamlines the checkout process because the customer doesn't have to enter payment information for each purchase.
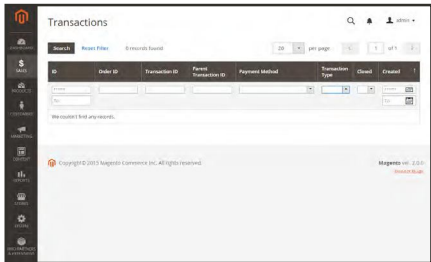


## Transactions

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



## Archive

Archiving orders and other sales documents on a regular basis improves performance and keeps your workspace free of unnecessary information.

**CHAPTER 48:**

# Shopping Cart

The cart is positioned at the end of the path to purchase, at the intersection of "Buy" and "Abandon," and is perhaps, the most important page in the store. The cart is where the order total is calculated, along with discount coupons and estimated shipping and tax. It's a great place to show your trust badges and seals, and an ideal opportunity to offer one last item. You can choose the items to be offered as a cross-sell impulse purchase whenever a specific item appears in the cart.
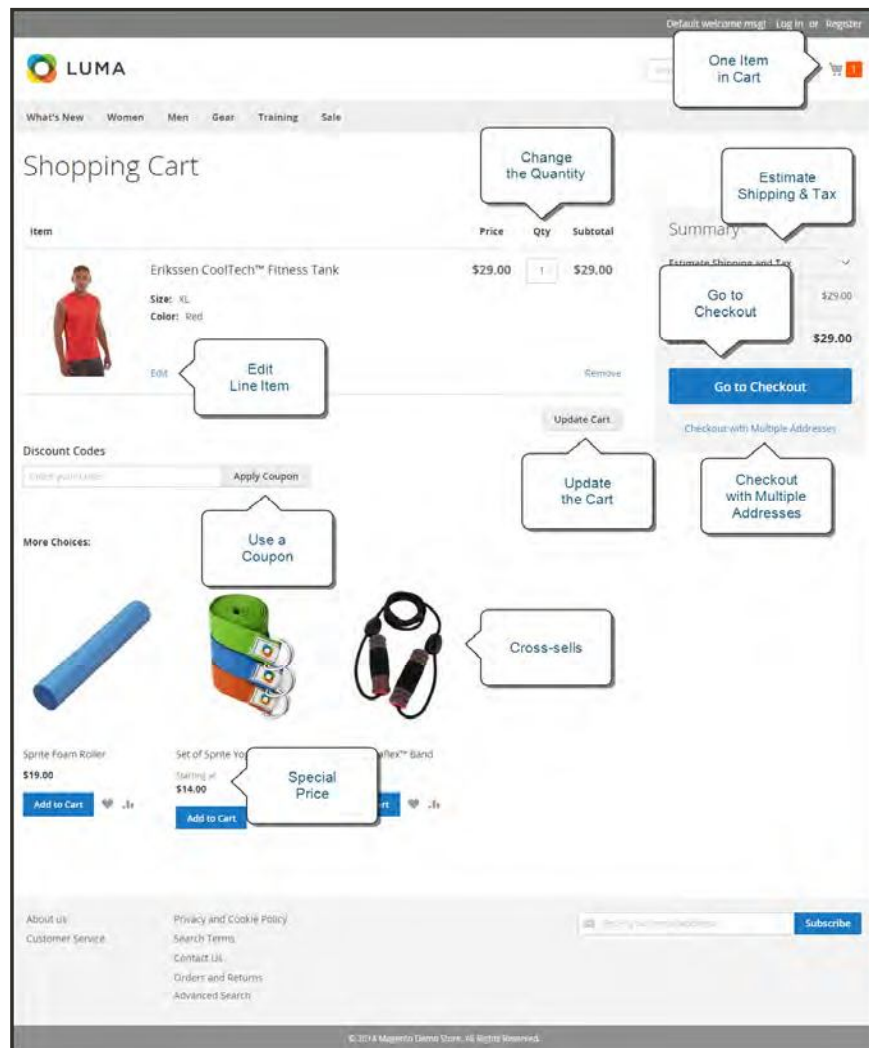


*Shopping Cart*

# My Cart Link

The cart link in the upper-right corner of the header gives a quick summary of the contents of the cart. The link can be configured to display the number of different products (or SKUs) in the cart, or the total quantity of all items. If the Shopping Cart Sidebar is enabled, you can click the link to display more detail.
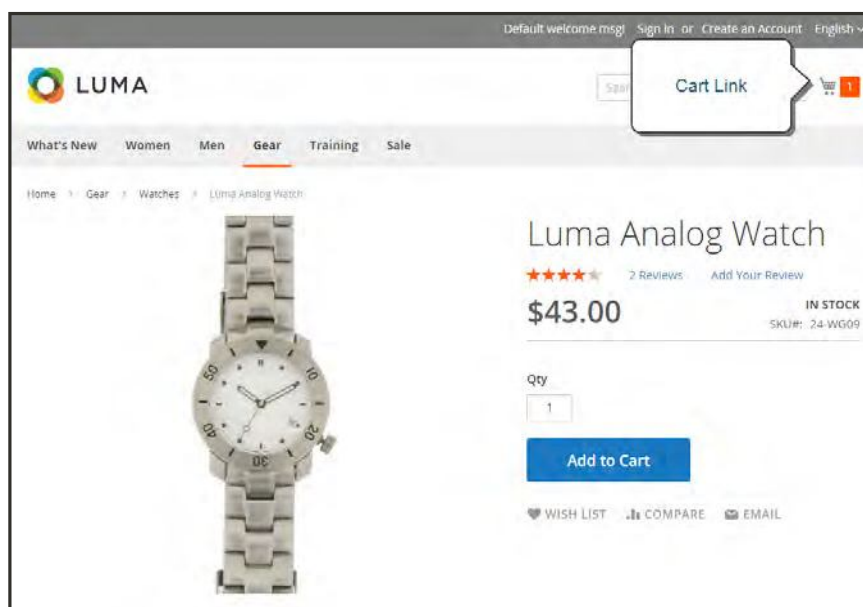


*Cart Link*

### To configure the cart link:

1. On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2. In the panel on the left under **Sales**, choose **Checkout.**

3. Expand ⌄ the **My Cart Link** section.

4. Set **Display Cart Summary** to one of the following:

   • Display item quantities
   • Display number of items (different products) in cart.

5. When complete, tap Save Config.



*My Cart Link*

# Cart Sidebar

The Cart Sidebar is often called the "mini cart," and displays a summary of the items in the cart. It is enabled by default, and appears when you click the number of items in the Cart Link.



*Shopping Cart Sidebar*
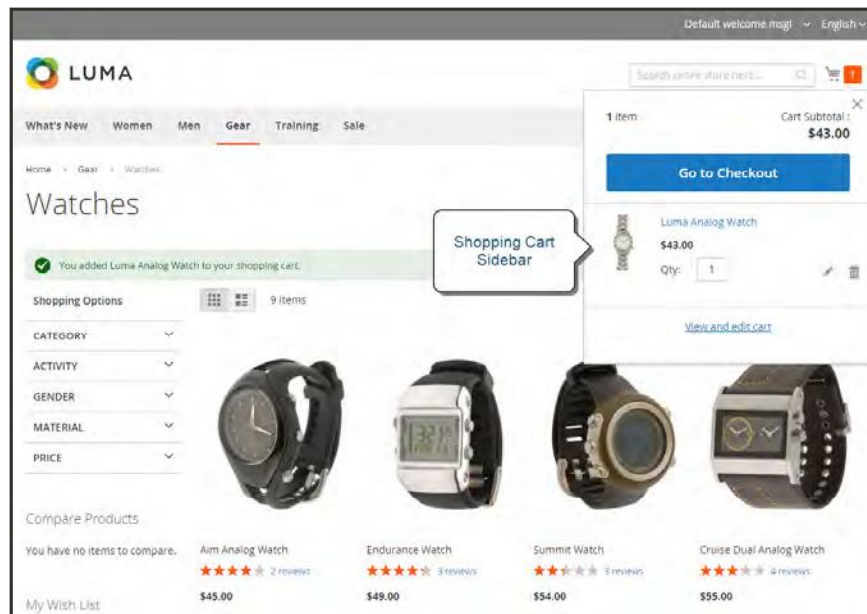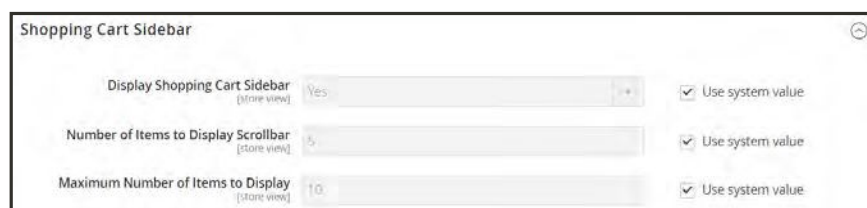
### To configure the mini cart:

1.  On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2.  In the panel on the left under **Sales**, choose **Checkout.**

3.  Expand the **Shopping Cart Sidebar** section. Then, do the following:



*Shopping Cart Sidebar*

a.  Set **Display Shopping Cart Sidebar** to your preference.

b.  In the **Maximum Display Recently Added Item(s)** field, enter the maximum number of recently added items that you want to appear in the mini cart.

4.  When complete, tap **Save Config.**

# Redirect to Cart

The shopping cart page can be configured to appear whenever an item is added to the cart, or only when customers choose to go to the page. The basic information about the items currently in the cart is always available in the mini cart, The decision is a matter of balancing the benefits letting customers continue shopping, with the benefit of encouraging customers to proceed to checkout. If might be simply a matter of personal preference. However, if you want back it up with numbers, you can run an A/B test to see which approach produces a higher conversion rate.

## To configure when the cart appears:

1.  On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2.  In the panel on the left under **Sales**, choose **Checkout.**

3.  Expand the **Shopping Cart** section.

4.  Set **After Adding a Product Redirect to Shopping Cart** to your preference.

5.  Tap Save Config.



*Redirect to Cart*

# Quote Lifetime

You can determine how long a price is valid by setting the cart quote lifetime in the configuration. For example, if a shopper leaves a cart unattended after several days, the quotes price for some items might no longer be the same. By default, the quote lifetime is set to thirty days.

## To configure the quote lifetime:

1.  On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2.  In the panel on the left under **Sales**, choose **Checkout.**

3.  Expand ⌄ the **Shopping Cart** section.

4.  In the **Quote Lifetime (days)** field, enter the number of days that a quoted price remains valid.

5.  When complete, tap **Save Config** .



*Shopping Cart*

# Minimum Order Amount

The configuration allows you to specify a minimum amount, after discounts are applied, that order subtotals are required to meet. Orders shipped to multiple address can be required to meet the minimum order amount per address. The Checkout button becomes available only after the minimum order amount is reached.
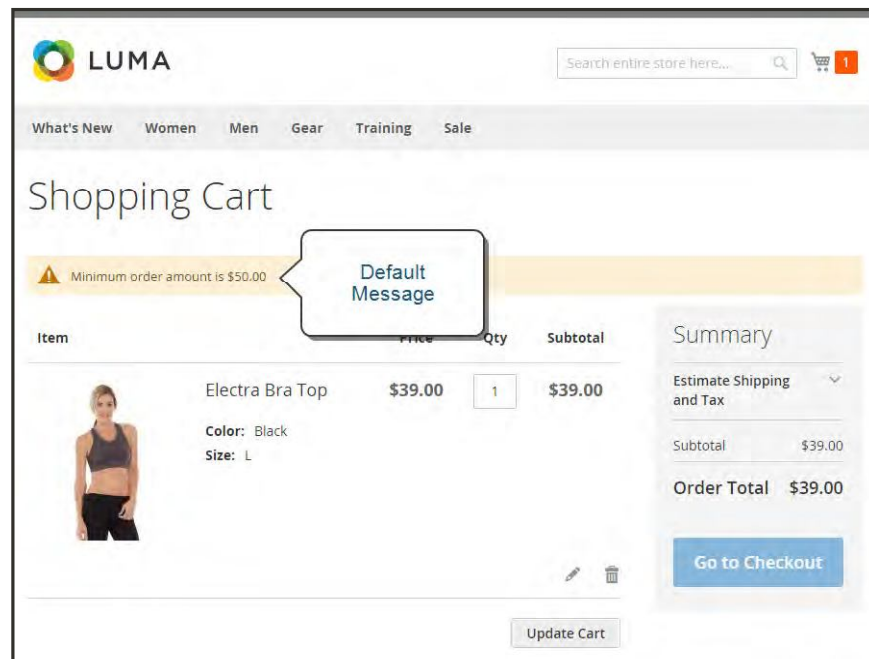


*Minimum Order Message in Cart*

### To configure a minimum order amount:

1. On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2. In the panel on the left, under **Sales**, choose **Sales.**

3. Expand the **Minimum Order Amount** section. Then, do the following:

*Minimum Order Amount*

**a.** To require a minimum order amount, set **Enable** to "Yes."

**b.** Enter the **Minimum Amount** that is required for the subtotal, after discounts are applied.

**c.** Set **Include Tax to Amount** to one of the following:

Yes       Requires the subtotal to meet the minimum amount with tax included.

No       Requires the subtotal to meet the minimum amount without tax.

**d.** To change the default message that appears at the top of the cart when the subtotal doesn't meet the minimum amount, enter the text in the **Description Message** box. Leave the box blank to use the default message.

**e.** To change the default error message, enter the text in the **Error to Show in Shopping Cart** box.

**f.** To require that each address in a multi-address order meet the minimum order amount, set **Validate Each Address Separately in Multi-address Checkout** to "Yes."

**g.** To change the default message at the top of the cart for orders that are to be shipped to multiple addresses, but do not meet the minimum, enter the text in the **Multi-address Description Message** box.

**h.** To change the default error message for orders that are to be shipped to multiple addresses, but do not meet the minimum, enter the text in the **Multi-address Error to Show in Shopping Cart** box.

**4.** When complete, tap **Save Config.**

# Allow Reorders

When enabled, reorders can be made directly from the customer account or from the original order in the Admin. Reorders are enabled by default.
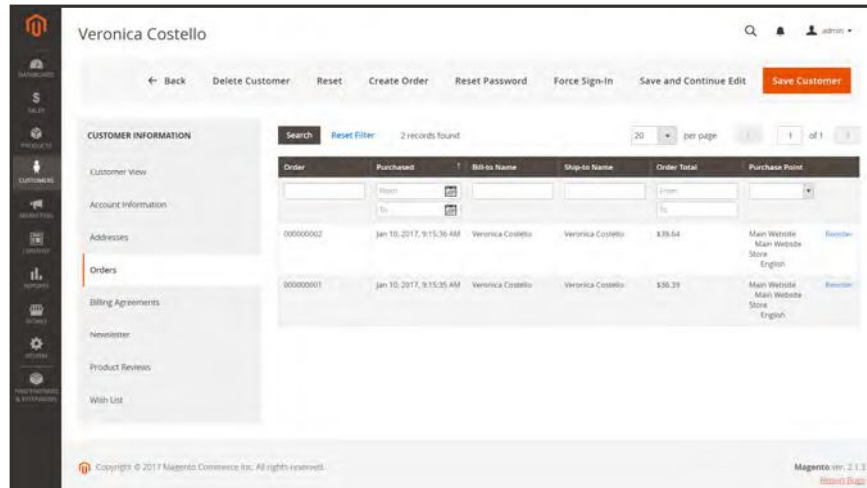


*Customer Reorder Link in Admin*

## To configure customer reorders:

1. On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2. In the panel on the left, under **Sales**, choose **Sales.**
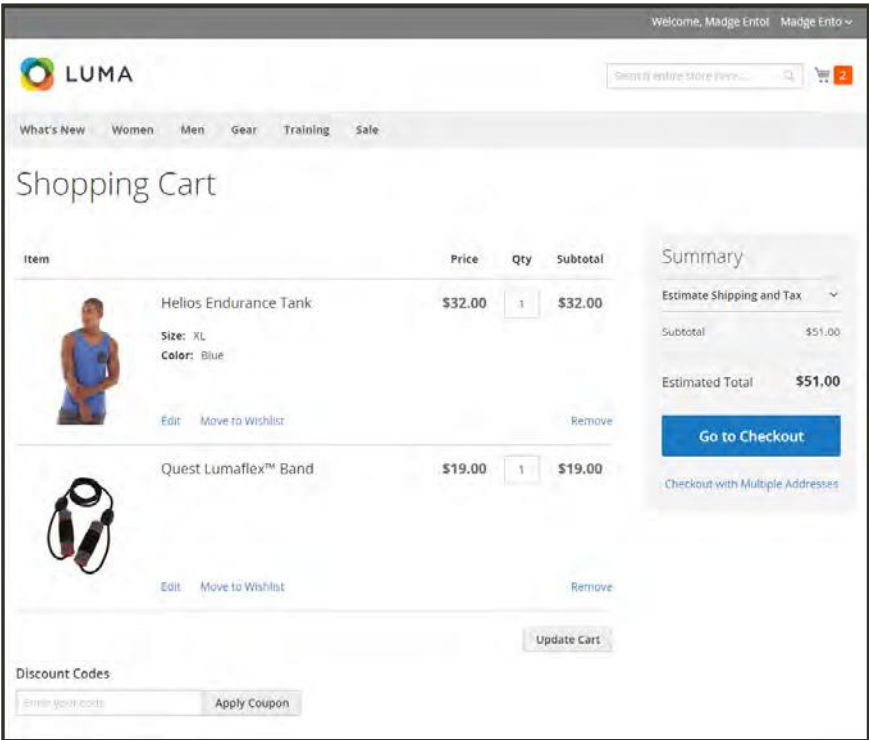
3. Expand ⌄ the **Reorder** section.



*Reorder*

4. Set **Allow Reorder** to your preference.

# Cart Thumbnails

The thumbnail images in the cart give customers a quick overview of the items they are about to purchase. However, for products with multiple options, the image might not match the variation of the product that is in the cart. If the customer purchases an item in a specific color, ideally, the thumbnail in the cart should match.

The thumbnail image for both grouped and configurable products can be set to display the image from either the "parent" product or from the product variation. The setting applies to all grouped or configurable products in the current store view.



*Thumbnail Images in Cart*

## To configure cart thumbnails:

1. On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2. In the panel on the left under **Sales**, choose **Checkout.**

3. Expand ⌄ the **Shopping Cart** section. Then, do the following:



*Shopping Cart*

   a. Set **Grouped Product Image** to one of the following:

   - Product Thumbnail Itself
   - Parent Product Thumbnail

   b. Set **Configurable Product Image** to one of the following:

   - Product Thumbnail Itself
   - Parent Product Thumbnail
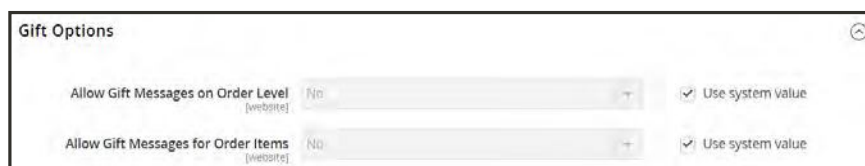
4. When complete, tap **Save Config** .

# Gift Options

The selection of available gift options appears in the cart before the checkout process begins. The Gift Options configuration determines if customers can add a gift message. Each item in the order can have a separate message. The Gift Options configuration applies to the entire website, but can be overridden at the product level.
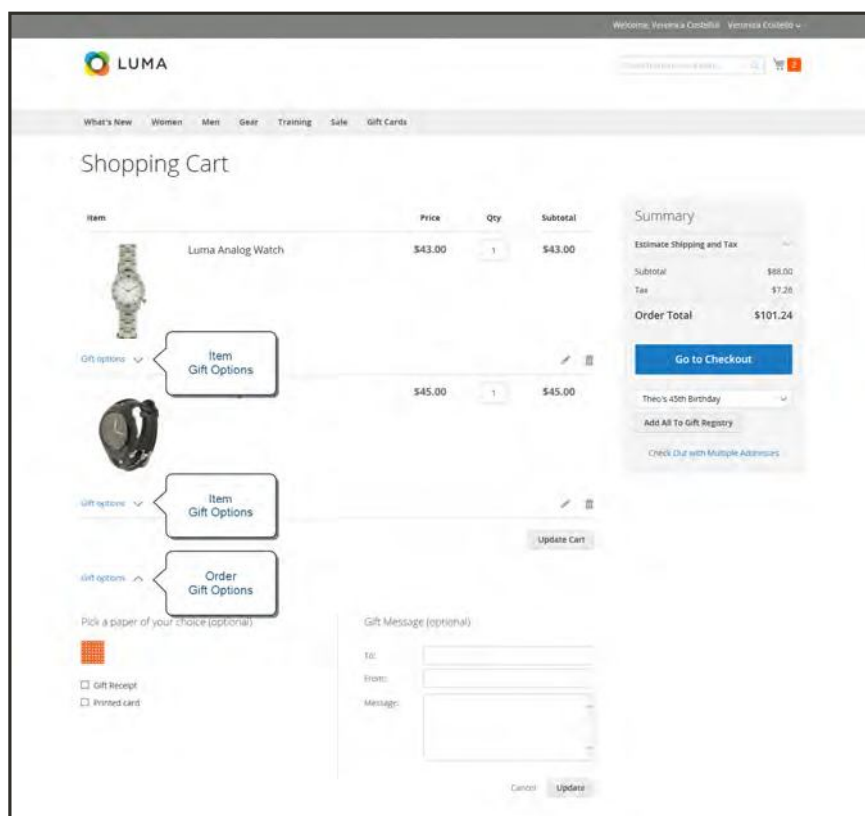
*Gift Options in Shopping Cart*

## To enable gift options:

1. On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2. In the panel on the left, under **Sales**, choose **Sales.** Then, expand ⌄ the **Gift Options** section.



*Gift Options*

3. Set the **Gift Message** options according to your preference:

   - Allow Gift Messages on Order Level
   - Allow Gift Messages for Order Items
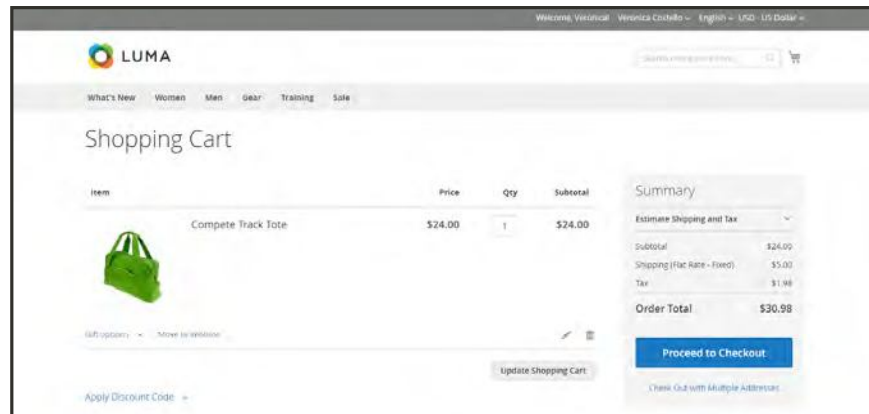
4. When complete, tap **Save Config.**

**CHAPTER 49:**

# Shopping Assistance

Customers sometimes need assistance to complete a purchase. Some customers like to shop online, but would rather the order by phone. You can offer immediate assistance both guests and customers who have registered for an account with your store.

- Creating Customer Accounts
- Creating Orders



*Shopping Cart*

# Creating an Order

For registered customers who need assistance, you can create an entire order directly from the Admin. The Create New Order form includes all the information that is needed to complete the normal checkout process, with activity summaries from the customer's account dashboard.



*Create New Order*

### To create a new order:

1. On the Admin sidebar, tap **Customers.**

2. Find the customer in the grid. Then in the **Action** column, click **Edit.**

3. In the workspace header, tap **Create Order.**



4. If your store has multiple views, choose the store view where the order is to be placed. .

5. To add products from the **Customer's Activities**, mark the checkbox of each product in the panel on the left. Then, scroll down and tap **Update Changes** . The item appears in the order form.
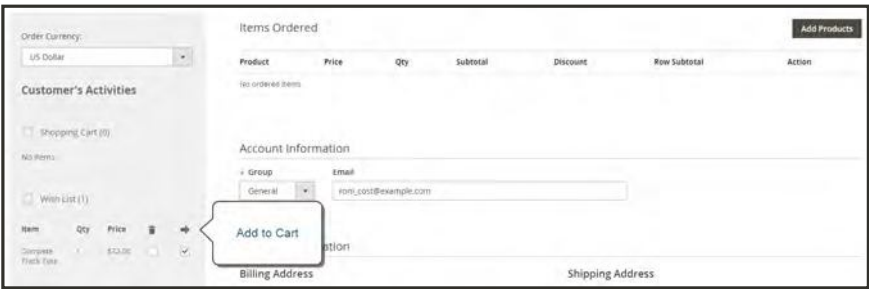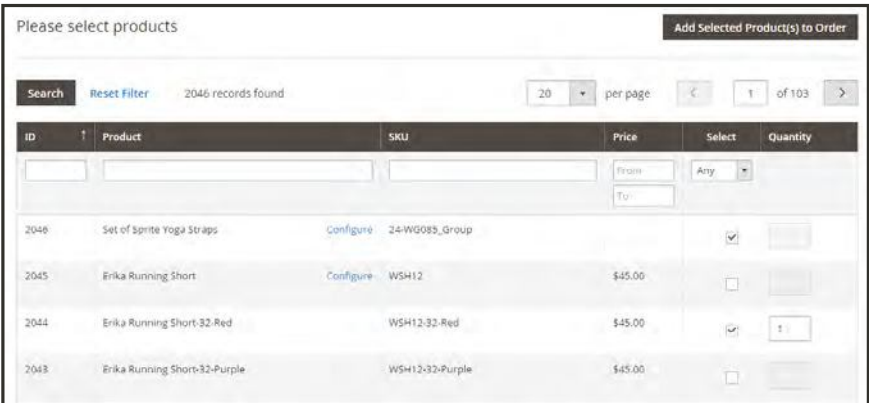
*Add to Cart*

**6.** To add products from the catalog, tap **Add Products**. Then, do the following:
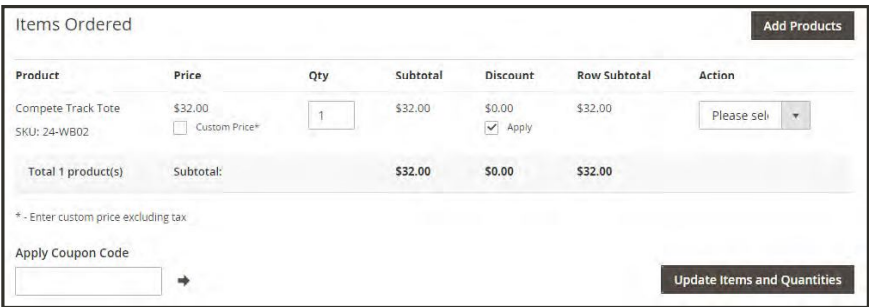

*Add Products*

**a.** In the grid, mark the checkbox of each product to be added to the cart, and enter the **Qty** to be purchased.


*Select Products*

**b.**  If the product has multiple options, tap `Configure.` Complete the options as needed, and tap `OK.` Then, click the **Add Selected Product(s) to Order** link to update the cart.

**c.**  To override the price of an item, mark the **Custom Price** checkbox. Then, enter the new price in the box below. To update the cart totals, tap `Update Items and Quantities.`



*Custom Price*

**d.**  Complete the following sections as needed for the order:

- Apply Coupon Codes
- Payment Method
- Shipping Method
- Order Comments

**7.**  When complete, tap `Submit Order.` A confirmation is sent to the customer, and the customer can view the order details from their account.



*Order Created*

# Updating an Order

After a customer places an order, it is sometimes necessary to edit the order, place it on hold, or cancel it entirely. When you change an order, the original order is canceled and a new order is generated. You can, however, change the billing or shipping address without generating a new order.
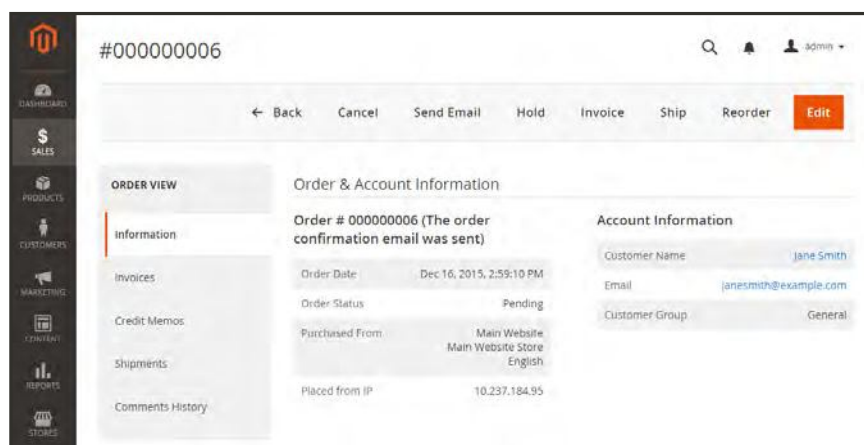


*Edit Order*

### To edit an order:

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

2. Find the order to be edited. Then in the **Action** column, click the **View** link.

3. Tap `Edit`. When prompted to confirm, tap `OK` to continue.

4. Make the necessary changes to the order.

5. When complete, do one of the following:

   - To save changes made to the billing or shipping address, tap `Save`.
   - To save changes made to line items, and reprocess the order, tap `Submit Order`.

## To place an order on hold:

If the customer's preferred method of payment is not available, or if the item is temporarily out of stock, you can put the order on hold.

**1.** In the Orders grid, find the pending order that you want to place on hold.

**2.** In the **Action** column, click the **View** link.

**3.** Tap `Hold` to place the order on hold.
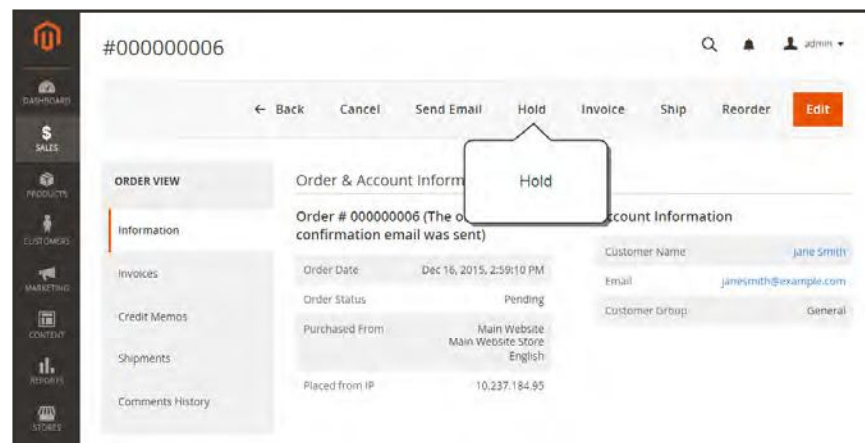


*Hold Order*

**4.** When you are ready to return the order to an active state, repeat the process and tap `Unhold.`

## To cancel an order:

Canceling an order changes its status from "Pending" to "Canceled."

**1.** In the Orders grid, find the pending order to be canceled.

**2.** In the **Action** column, click the **View** link.

**3.** Tap `Cancel.`

**CHAPTER 50:**

# Checkout

When the checkout process begins, the transaction shifts to a secure, encrypted channel. A padlock symbol appears in the address bar of the browser, and the URL changes from "http" to "https".

From this point on, the goal is to gather the information necessary to complete the transaction. The Checkout page leads the customer through each step of the process. Customers who are logged into their accounts can complete checkout quickly, because much of the information is already in their accounts.

## Checkout Steps



### Step 1: Shipping

The first step of the checkout process is for the customer to complete the shipping address information, and to choose the shipping method.



### Step 2: Review & Payments

During the second step of the checkout process, the customer chooses the payment method, and applies any coupons with promotional codes to the purchase.

The order confirmation appears after the order is placed. For registered customers, the page includes the order number with a link to the customer's account, and a link to generate a receipt.

# Checkout Step 1: Shipping

The first step of the checkout process is for the customer to complete the shipping address information, and to choose the shipping method. If the customer has an account, the shipping address is entered automatically, but can be changed if needed. The progress bar at the top of the page follows each step of the checkout process, and the Order Summary shows the information entered so far.



*Checkout Step 1: Shipping*

## **Checkout Step 2:** Review & Payments

During the second step of the checkout process, the customer chooses the payment method, and applies any coupons with promotional codes to the purchase. All information can be reviewed, and edited if needed. If enabled, the customer must to agree to the terms and conditions of the sale before placing the order.
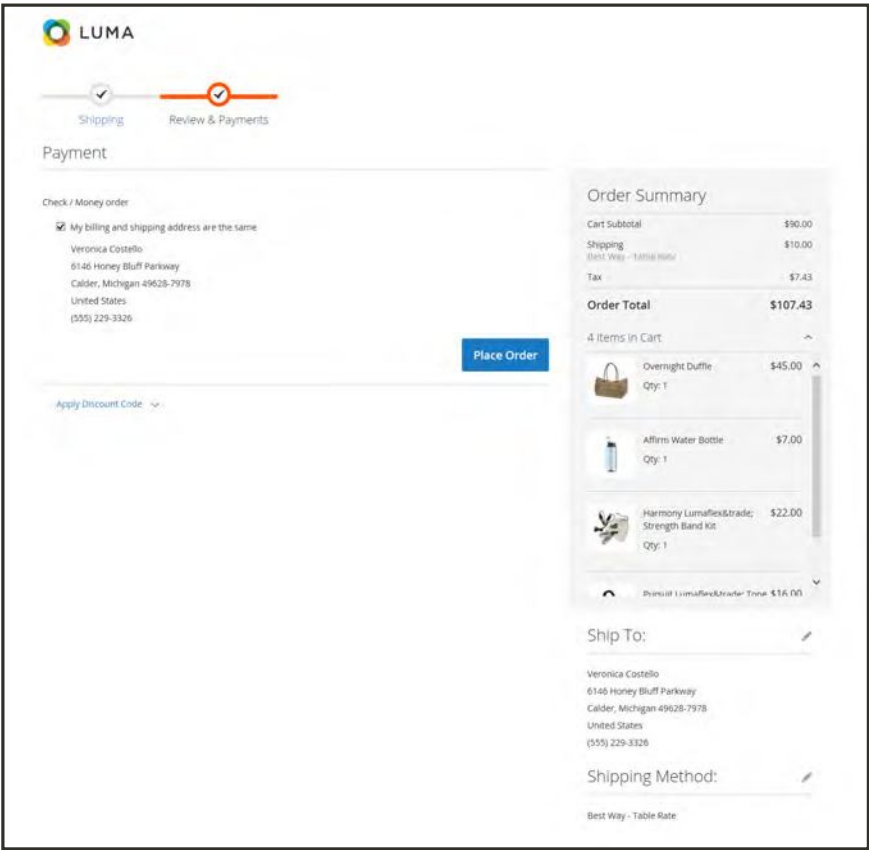


*Review & Payments*

# Order Confirmation

The order confirmation appears after the order is placed. For registered customers, the page includes the order number with a link to the customer's account, and a link to generate a receipt. Registered customers are told that they will receive order confirmation and tracking info by email. Guests are encouraged to create an account to track the order. Registered customers can generate a receipt by clicking a link.

The order confirmation page is also called the "Success" page, and is used by analytics programs to track conversions.
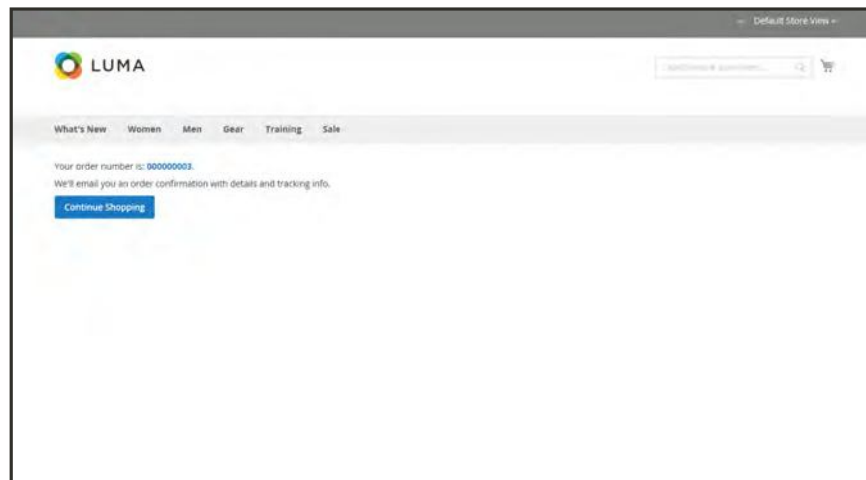


*Order Confirmation*

# Checkout Options

The checkout configuration determines the layout of the checkout page, and if shoppers must register for an account and agree to the terms and conditions of the sale before making a purchase.
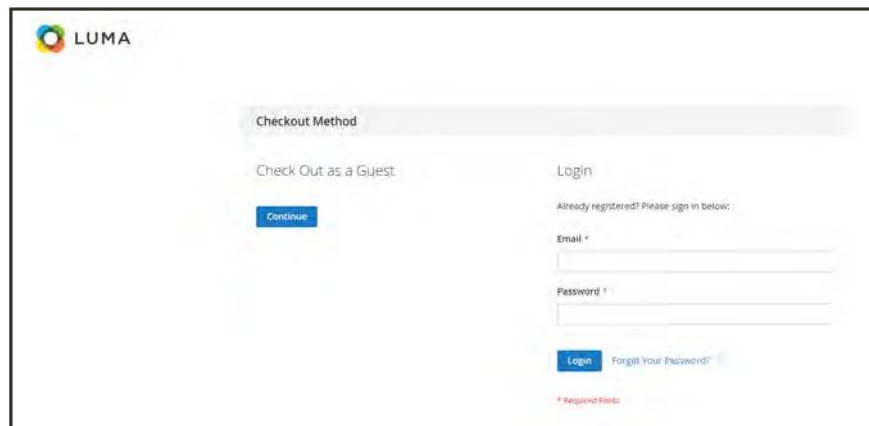


*Checkout Options*

## To change the checkout options:

1.  On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2.  In the panel on the left under **Sales**, choose **Checkout.**

3.  Expand ⊙ the **Checkout Options** section.

4.  Set the following to your preference:

    -   Enable Onepage Checkout

    -   Allow Guest Checkout

    -   Enable Terms and Conditions

5.  When complete, tap **Save Config.**

# Guest Checkout

Your store can be configured to require shoppers to open an account before making a purchase. The default setting allows guests to make purchases, with an option to register for an account after they complete the checkout process.
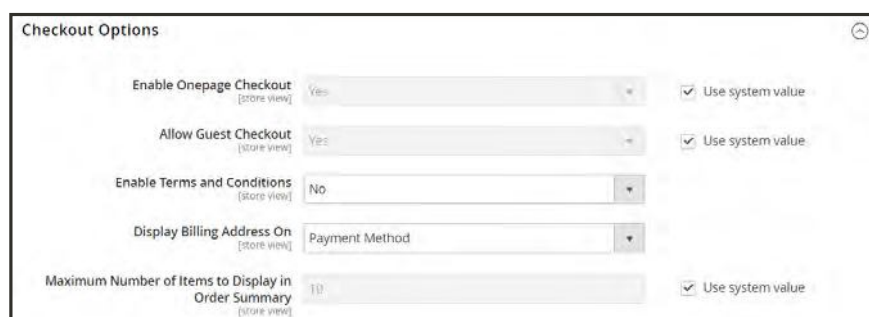


*Checkout as Guest*

## To change the guest checkout setting:

1. On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2. In the panel on the left under **Sales**, choose **Checkout.**

3. Expand ⊙ the **Checkout Options** section.

4. If necessary, clear the **Use system value** checkbox. Then, do the following:

   a. If applicable, choose the store view where the configuration applies.

   b. When prompted, tap **OK** to continue.

5. Set **Allow Guest Checkout** to your preference:



*Checkout Options*

6. When complete, tap **Save Config.**
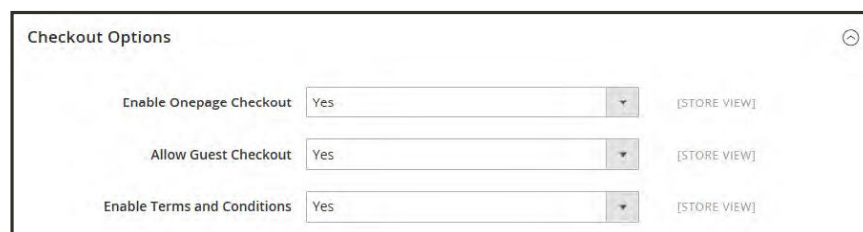
# Terms and Conditions

When Terms and Conditions is enabled, customers are required to agree to the terms and conditions of the sale before the purchase is finalized. The Terms and Conditions of the sale typically includes disclosure information that might be required by law for B2C or B2B sites, and outlines the rights of the buyer and seller. The Terms and Conditions message appears after the payment information, just before the Place Order button.
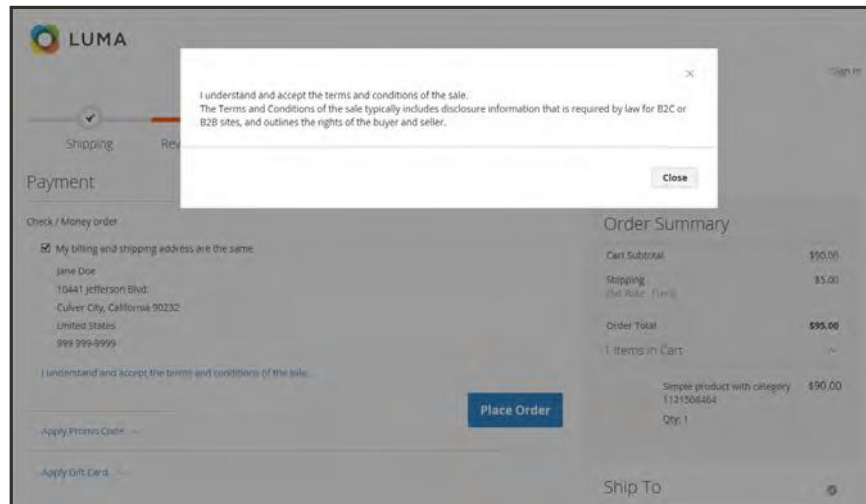


*Terms and Conditions at Checkout*

### Step 1: Enable Terms and Conditions

1. On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2. In the panel on the left under **Sales**, choose **Checkout.**

3. Expand ⊙ the **Checkout Options** section. Then, do the following:

   a. Verify that **Enable Onepage Checkout** is set to "Yes."

   b. Set **Enable Terms and Conditions** to "Yes."



*Checkout Options*

4. When complete, tap **Save Config.**

### Step 2: Add Your Terms and Conditions

1.   On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Terms and Conditions.**

2.   In the upper-right corner, tap `Add New Condition`.
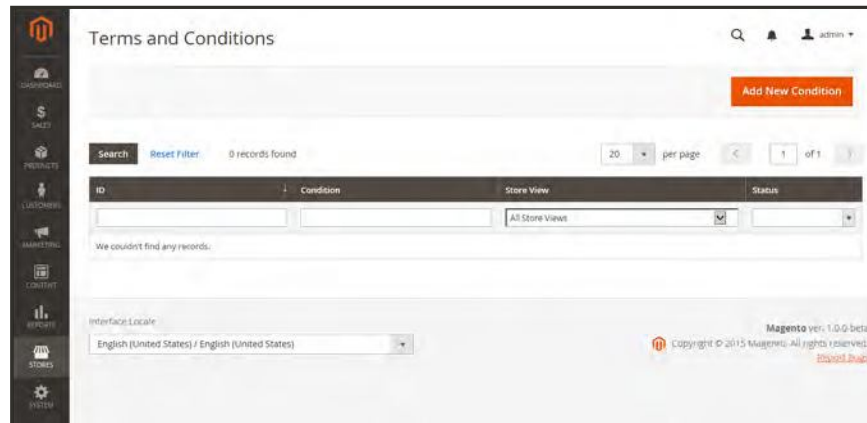


*Terms and Conditions Information*

3.   In the Terms and Conditions Information section, complete the following:



*New Condition*

a.   Enter the **Condition Name** for internal reference.

b.   Set **Status** to "Enabled."

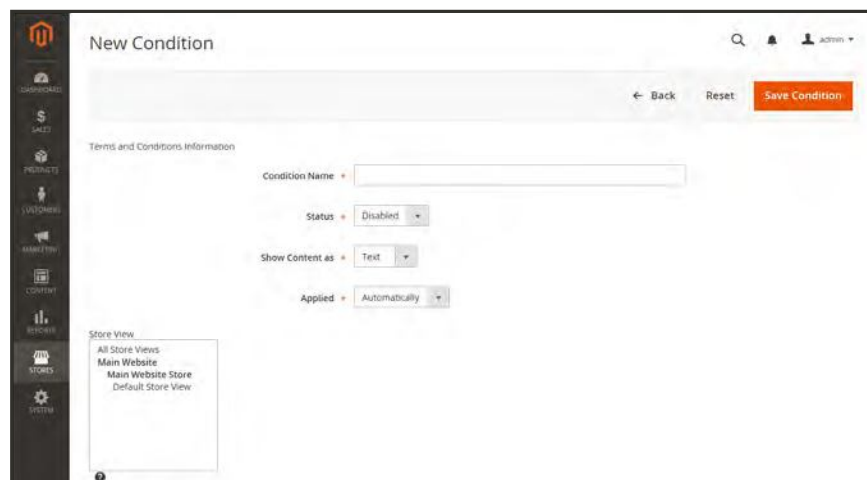    **c.** Set **Show Content as** to one of the following:

      Text                  Displays the terms and conditions content as unformatted text.

      HTML               Displays the content as HTML which can be formatted..

**4.** Select each **Store View** where the Terms and Conditions is to be used.

**5.** Enter the **Checkbox Text** to be used as the text for the Terms and Conditions link. For example, "I understand and accept the terms and conditions of the sale.

**6.** In the **Content** box, enter the full text of the terms and conditions of the sale.

**7.** (Optional) Enter the **Content Height (css)** in pixels, to determine the height of the text box where the terms and conditions statement appears during checkout. For example, to make the text box one inch high on a 96 dpi display, enter 96. A scroll bar appears if the content extends beyond the height of the box.
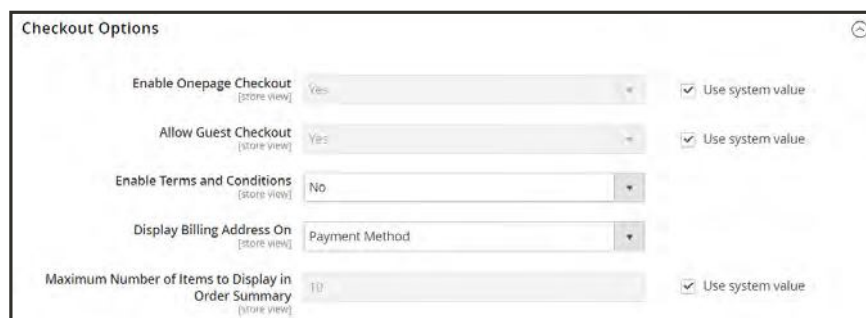
**8.** When complete, tap **Save Condition.**

# One Page Checkout

The purpose of OnePage Checkout is to gather the information that is needed, and complete the sale as quickly as possible. When Onepage Checkout is enabled, the entire checkout process takes place on a single page. Each section of the checkout information is expanded as needed.

Magento's Onepage Checkout is enabled by default. If you are implementing a custom integration or checkout extension, it might be necessary to disable Onepage Checkout.

## To disable Onepage Checkout:

1.   On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2.   In the panel on the left under **Sales**, choose **Checkout.**



*Checkout Options*

3.   Expand ⌄ the **Checkout Options** section.

4.   If necessary, clear the **Use system value** checkbox. Then, do the following:

   a.   If the setting is for a specific store view, choose the store view where the configuration applies.

   b.   When prompted, tap **OK** to continue.

5.   Set **Enable Onepage Checkout** to "No."

6.   When complete, tap **Save Config.**
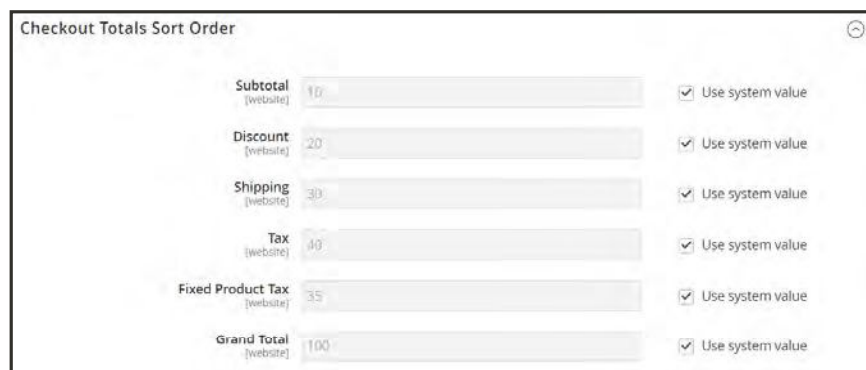
# Checkout Totals Sort Order

During Order Review, the total appears at the bottom of the order, with any adjustments for discounts, shipping charges, store credit, and tax. The order of each item determines the sequence of the calculations, and is set in the configuration by a number that is assigned to each item. For example, the Subtotal is the first item in the section, and is assigned a value of 10. The Grand Total appears last, and is assigned a value of 100. All of the other items in the totals section are assigned a value between those values.
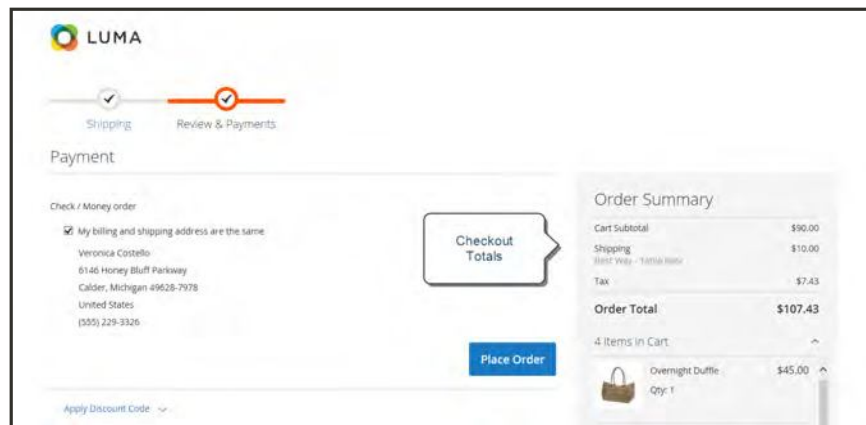


*Checkout Totals*

### To configure the checkout totals:

1. On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**

2. In the panel on the left under **Sales**, choose **Sales.**

3. Expand ⊙ the **Checkout Totals Sort Order** section.



*Checkout Totals Sort Order*

4. If necessary, clear the **Use system value** checkbox. Then, do the following:

      **a.**    If the setting is for a specific store view, choose the store view where the configuration applies.

      **b.**    When prompted, tap **OK** to continue.

**5.**    Change the number assigned to each item to determine its order in the Totals section..

**6.**    When complete, tap **Save Config.**