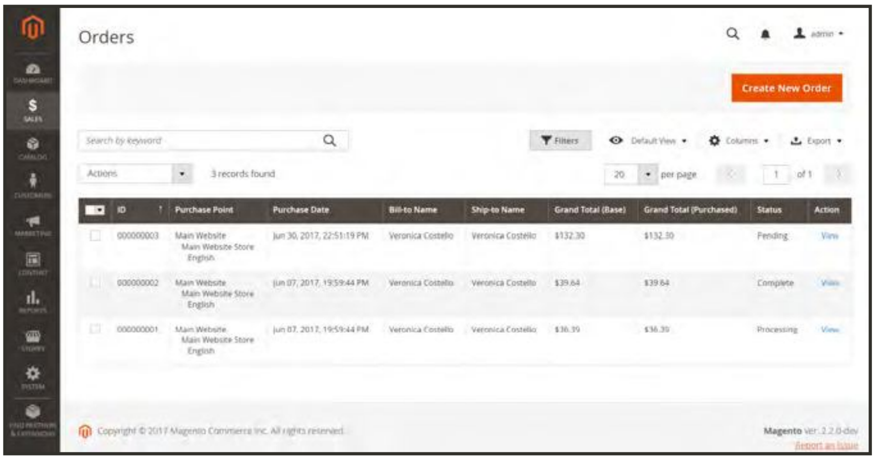
CHAPTER 51:

Orders

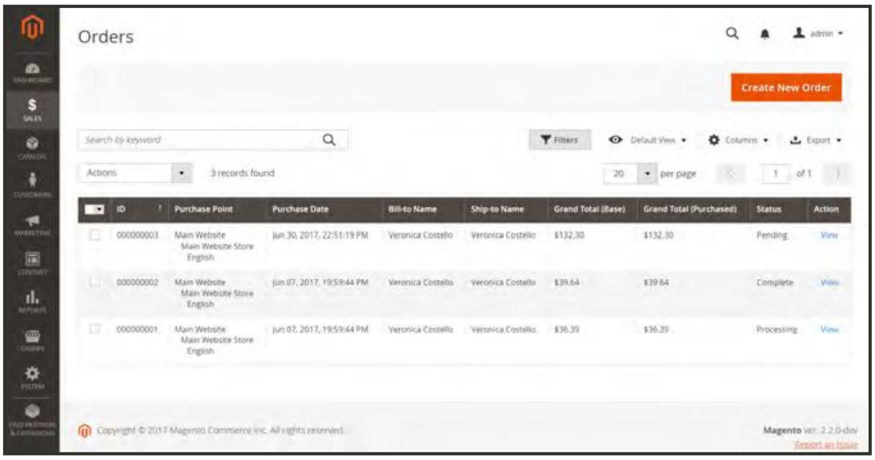
The Orders workspace lists all current orders. Each row in the grid represents an order, and each column represents an attribute, or data field. Use the standard controls to sort and filter the list, find orders, and apply actions to selected orders. You can view existing orders, and create new orders. The tabs above the pagination controls can be used to filter the list, change the default view, change and rearrange columns, and export data.



Orders

Order Workspace

The Order workspace lists all current orders. Each row in the grid represents a customer order, and each column represents an attribute, or data field . Use the standard controls to sort and filter the list, find orders, and apply actions to selected orders. From the grid, you can view existing orders, and create new orders. The tabs above the pagination controls are used to filter the list, change the default view, change and rearrange columns, and export data.



Orders

Workspace Controls

CONTROL	DESCRIPTION
Create New Order	Creates a new order.
Search	Initiates a search for orders based on the current filters.
Filters	Defines a set of search parameters that determines the records that appear in the grid.
Default View	Determines the default column layout of the grid.
Columns	Determines the selection of columns and their order in the grid. The column layout can be changed. and saved as a “view.” By default, only some of the columns are included in the grid.
Export	Exports the selected records as a CSV or Excel XML file.

Column Descriptions

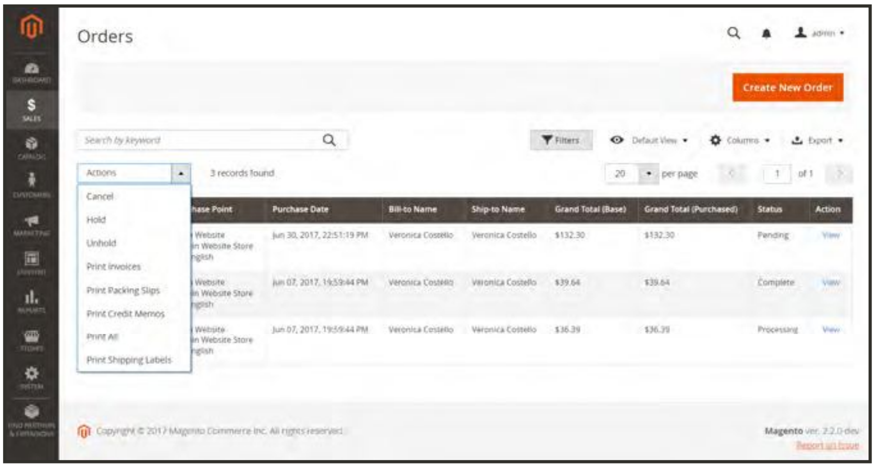
COLUMN	DESCRIPTION	
Select	Mark the checkbox to select the quote(s) to be subject to an action, or use the selection control in the column header. Options: Select All / Deselect All	
ID	A unique, sequential number that is assigned when a new order is saved for the first time.	
Purchase Point	Identifies the store view where the order was placed.	
Purchase Date	The date the order was placed.	
Bill-to Name	The name of the person who is responsible to pay for the order.	
Ship-to Name	The name of the person to whom the order is to be shipped.	
Grand Total (Base)	The grand total of the order.	
Grand Total (Purchased)	The grand total of products purchased in the order.	
Status	The current order status.	
Action	View	Opens the order in edit mode.
ADDITIONAL COLUMNS AVAILABLE		
Billing Address	The billing address of the customer who placed the order.	

Column Descriptions (cont.)

COLUMN	DESCRIPTION
Shipping Address	The address where the order is to be shipped.
Shipping Information	The method that is to be used to ship the order.
Customer Email	The email address of the person who placed the order.
Customer Group	The customer group to which the person who placed the order is assigned.
Subtotal	The order subtotal, without shipping and handling, and tax.
Shipping and Handling	The amount charged for shipping and handling.
Customer Name	The first and last name of the customer who placed the order.
Payment Method	The method of payment to be used for the order.
Total Refunded	Any amount from the order that is to be refunded to the customer.

Order Actions

To apply an action to specific orders, mark the checkbox in the first column of each order. To select or deselect all orders, use the control at the top of the column.



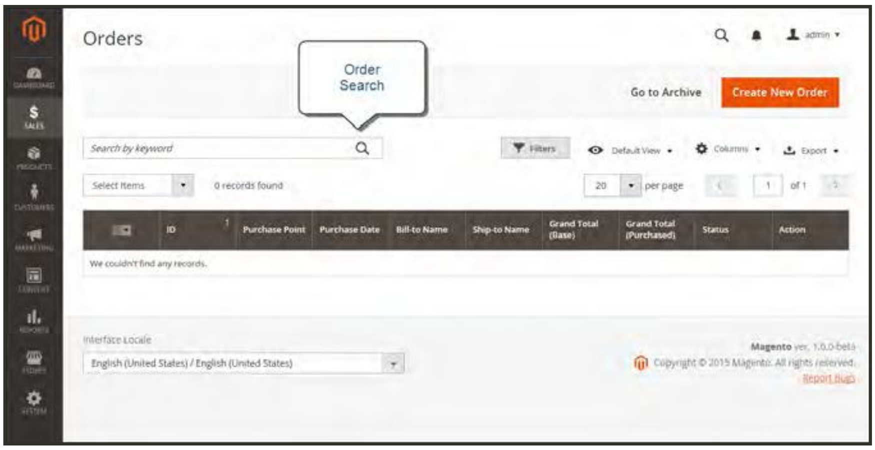
Order Actions

Action Controls

CONTROL	DESCRIPTION
Actions	Lists all actions that can be applied to selected orders. To apply an action to an order, or group of orders, mark the checkbox in the first column of each order. Order actions: Cancel, Hold, Unhold, Print Invoices, Print Packing Slips, Print Credit Memos, Print All, Print Shipping Labels
Mass Actions	Can be used to select multiple records as the target of action. Mark the checkbox in the first column of each record that is subject to the action. Options: Select All / Unselect All, Select Visible / Unselect Visible
Submit	Applies the current action to the selected order records.
Edit	Opens the order in edit mode.

Order Search

The Search box in the upper-left of the Orders grid can be used to find specific orders by keyword, or by filtering the order records in the grid.



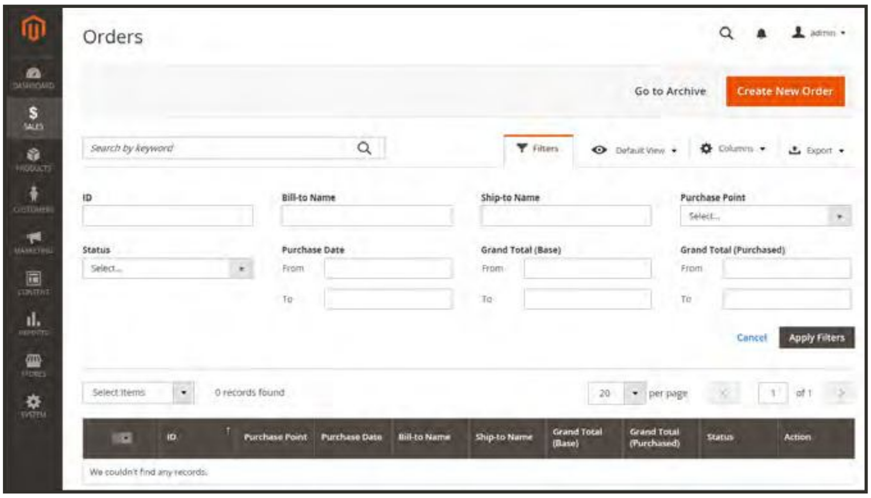
Search Results

To search for a match:

1. Enter a search term into the page search box.
2. Tap **Search** (🔍) to display the results.

To filter the search:

1. Tap the **Filters** (▼) tab to display the selection of search filters.
2. Complete as many of the filters as needed to describe the order(s) that you want to find.
3. Tap **Apply Filters** to display the results.



Order Filters

Search Filters

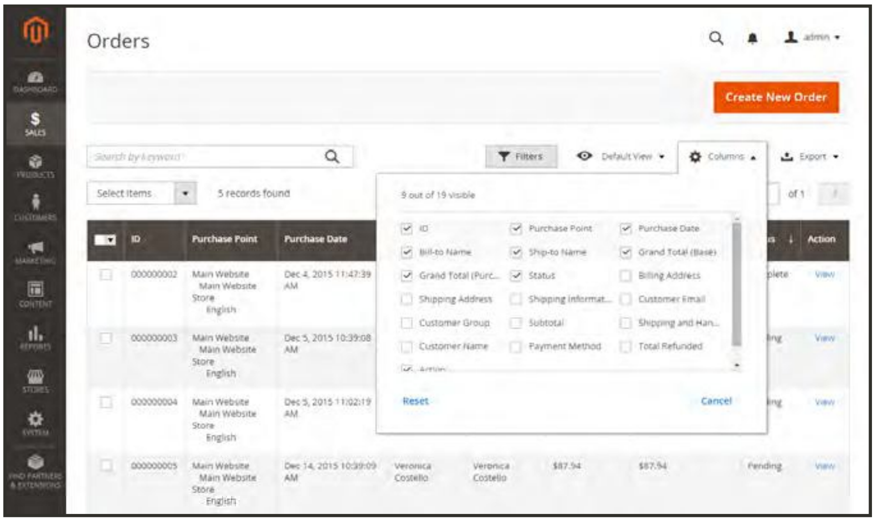
FILTER	DESCRIPTION
ID	Filters the search based on order ID.
Bill-to Name	Filters the search by the name of the person who is responsible to pay for the order.
Ship-to Name	Filters the search by the name of the person to whom each order is shipped .
Purchase Point	Filters the search by website, store, or store view where the order was placed.
Status	Filters the search based on order status. Options:

Search Filters (cont.)

FILTER	DESCRIPTION
	Canceled Closed Complete Suspected Fraud On Hold Payment Review PayPal Canceled Reversal Pending Pending Payment Processing
Purchase Date	Filters the search based on the date purchased. To find orders within a range of dates, enter both the From and To dates.
Grand Total (Base)	Filters the search based on the Grand Total of each order.
Grand Total (Purchased)	Filters the search based on Grand Total of items purchased in each order.
Apply Filters	Applies all filters to the search.
Cancel	Cancels the current search.
Clear All	Clears all search filters.

Order Grid Layout

The selection of columns and their order in the grid can be changed according to your preference. The new layout can be saved as a grid “view.” By default, only nine of twenty available columns are included in the grid.



Order Grid Columns

To change the column selection:

In the upper-right corner, tap the **Columns** (⚙) control. Then, do the following:

- Mark the checkbox of any column you want to add to the grid.
- Clear the checkbox of any column you want to remove from the grid.

Make sure to scroll down to see all available columns.

To move a column:

1. Tap the header of the column, and hold.
2. Drag the column to the new position, and release.

To save a grid view:

1. Tap the **View** control. Then, tap **Save Current View.**
2. Enter a **name** for the view. Then, click the **arrow** (➜) to save all changes.

   The name of the view now appears as the current view.

To change the view:

Tap the **View** control. Then, do one of the following:

- To use a different view, tap the name of the view.
- To change the name of a view, tap the **Edit** ( ) icon. Then, update the name.

Order Workflow

When a customer places an order, a sales order is created as a temporary record of the transaction. In the Orders grid, sales orders initially have a status of "Pending," and can be canceled at any time until the payment is processed. After payment is confirmed, the order can be invoiced and shipped.

1. **Place Order**. The checkout process begins when the shopper clicks the Go to Checkout button on the shopping cart page or reorders directly from their customer account.

2. **Order Pending.** In the Orders grid, the status of the sales order is initially "Pending." Payment has not been processed, and the order can still be canceled.

3. **Receive Payment.** The status of the order changes to "Processing." when payment is received or authorized. Depending on the payment method, you might receive notification when the transaction is authorized or processed.

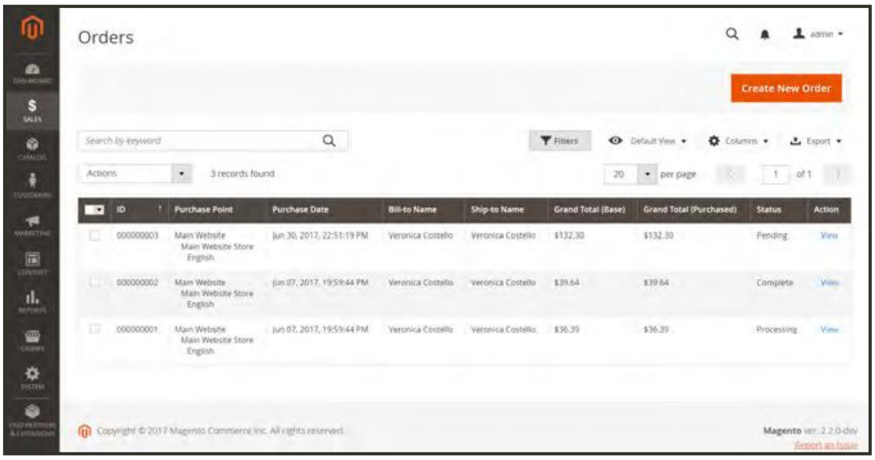
4. **Invoice Order.** An order is typically invoiced after payment is received. Some payment methods generate an invoice automatically when payment is authorized and captured. The payment method determines which invoicing options are needed for the order. After the invoice is generated and submitted, a copy is sent to the customer.

5. **Ship Order.** The shipment is submitted, and the packing slip and shipping label are printed. The customer receives notification, and the package is shipped. If tracking numbers are used, the shipment can be tracked from the customer's account.

Processing Orders

When a customer places an order, a sales order is created as a temporary record of the transaction. The sales order has a status of “Pending” until payment is received. Sales orders can be canceled until an invoice is generated. An easy way to think of it is this: Orders become invoices, and invoices become shipments. The Orders grid lists all orders, regardless of where they are in the workflow.

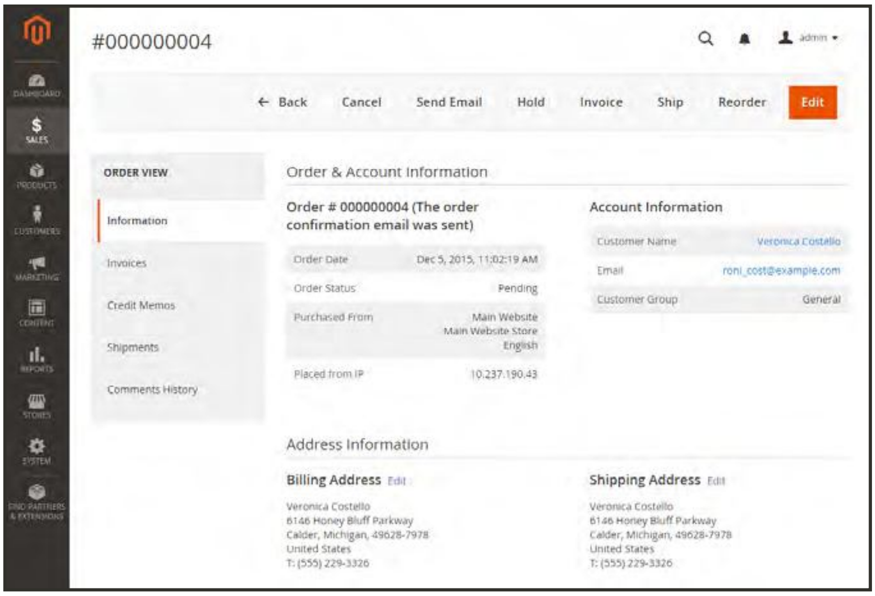
The panel on the left of an open order is used to display different information that is related to the order.



Orders

To view an order:

1. On the Admin sidebar, tap **Sales.** Then under **Operations**, choose **Orders.**
2. Find the order in the grid, and in the **Action** column, click **View.**
   - A pending order can be modified, put on hold, canceled, or invoiced and shipped.
   - A completed order can be reordered.

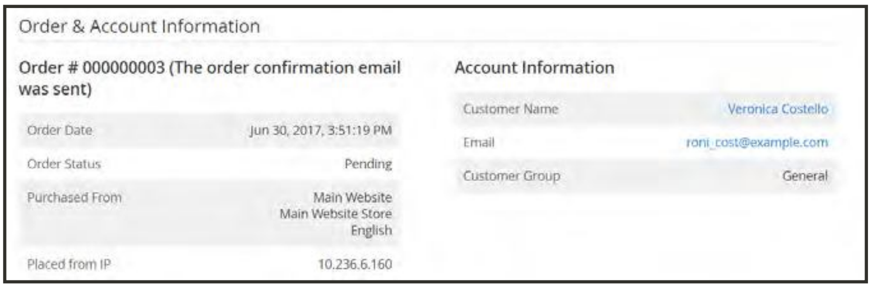


View Order

To process an order:

1. To open the order in view mode, and tap **Edit**.
2. Review the following sections in the sales order, using the field descriptions for reference.

Order and Account Information



Order and Account Information

Address Information

Address Information

Payment & Shipping Method

Payment & Shipping Method

Items Ordered

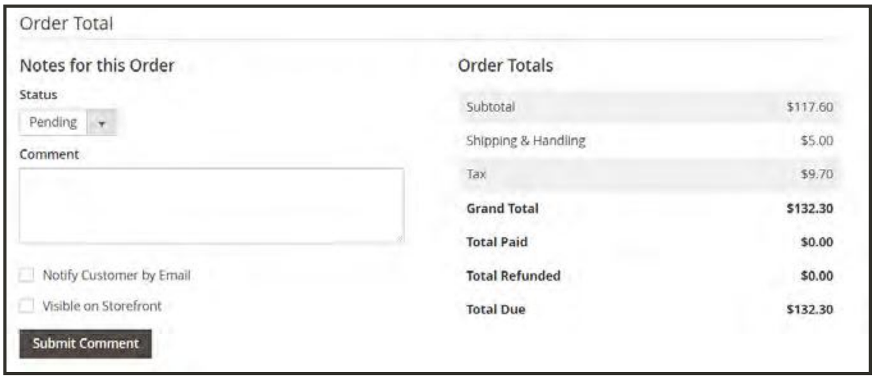
Items Ordered

3. In the **Order Total** section, do the following:

a. Enter a **Comment** to include with the order.

b. If you want to email the comment to the customer, mark the **Notify Customer by Email** checkbox.

c. If you want the comment to be visible in the customer account, mark the **Visible on Storefront** checkbox.



Order Total

4. If you are ready to invoice the order, tap **Invoice**. Then follow the instructions in Creating an Invoice

Order View Descriptions

TAB	DESCRIPTION
Information	Display detailed information about the order and account, including the billing and shipping addresses, payment and shipping methods, items orders, totals, and notes.
Invoices	Lists each invoice that is associated with the order.
Credit Memos	Lists each credit memo that is associated with the order.
Shipments	Lists each shipment record that is associated with the order.
Comments History	Lists all notes that are related to the order.

Button Bar

FIELD	DESCRIPTION
Back	Returns to the Orders page without saving changes.
Cancel	Cancels the sales order.
Send Email	Sends an email about the order to the customer.
Hold / Unhold	Changes the status of the sales order to “On Hold”. To release the hold on the sales order, choose “Unhold”.
Invoice	Creates an invoice from the sales order by converting the order to an invoice.
Ship	Creates a shipment record for the order.

Button Bar (cont.)

FIELD	DESCRIPTION
Reorder	Creates a new sales order based on the current order.
Edit	Opens the order in edit mode.

Field Descriptions

FIELD	DESCRIPTION
ORDER & ACCOUNT INFORMATION	
Order Number	The order number appears at the top of the sales order, and also 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.
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	

Field Descriptions (cont.)

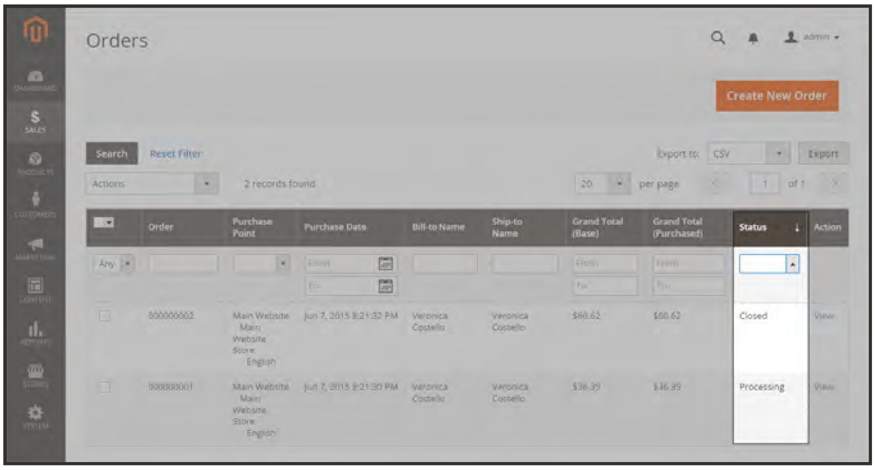
FIELD	DESCRIPTION
Payment Information	The method of payment to be used for the order, and purchase order number, if applicable, followed by the currency that was used to place the order.
Shipping & Handling Information	The shipping method to be used, and any handling fee that is applicable.
ITEMS ORDERED	
Product	The product name, SKU, and options if applicable.
Item Status	Indicates the status of the item. Values: Ordered
Original Price	The original catalog price of the item before discounts.
Price	The purchase price of the item.
Qty	The quantity ordered.
Subtotal	The subtotal is the purchase price multiplied by the quantity.
Tax Amount	The amount of tax that applies to the item as a decimal value.
Tax Percent	The percentage of tax applied to this item as a percentage.
Discount Amount	The discount that applies to this item.
Row Total	The line item total, including applicable taxes that are due at the product level, less discounts.
ORDER TOTAL	
Notes for this Order	
Status	Indicate the current status of the sales order.
Comment	A text box that is used to enter a comment to the customer that accompanies the order. Notify Customer by Email: Mark the checkbox if you want to send the comment to the customer as a separate email. Visible on Storefront: Mark the checkbox if you want the comment to be visible from the customer’s account.

Field Descriptions (cont.)

FIELD	DESCRIPTION
	Submit Comment — Submits the comment, and send by email, if applicable.
Order Totals	
Shipping & Handling	The amount charged for shipping and handling fees.
Tax	The amount of tax applied to the order, if applicable.
Grand Total	The order total.
Total Paid	The total amount paid toward the order, if applicable.
Total Refunded	The total amount refunded from the order, if applicable.
Total Due	The total amount that is due.

Order Status

All orders have an order status that is associated with a stage in the order processing workflow. The status of each order is shown in the Status column of the Orders grid. Your store has a set of predefined order status and order state settings. The order state describes the position of an order in the workflow.

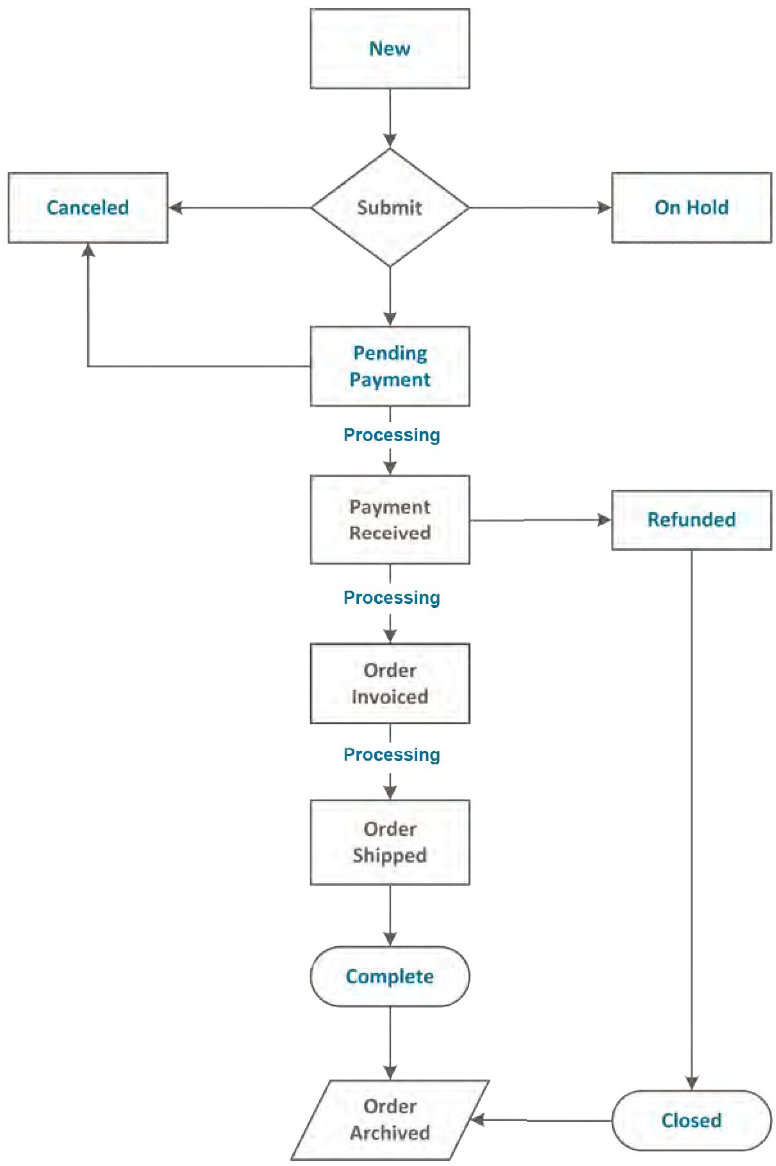


Order Status

Predefined Order Status

ORDER STATUS	STATUS CODE
Processing	processing
Suspected Fraud	fraud
Pending Payment	pending_payment
Payment Review	payment_review
Pending	pending
On Hold	holded
Complete	complete
Closed	closed
Canceled	canceled
PayPal Canceled Reversal	paypay_canceled_reversal
Pending PayPal	pending_paypal
PayPal Reversed	paypal_reversed

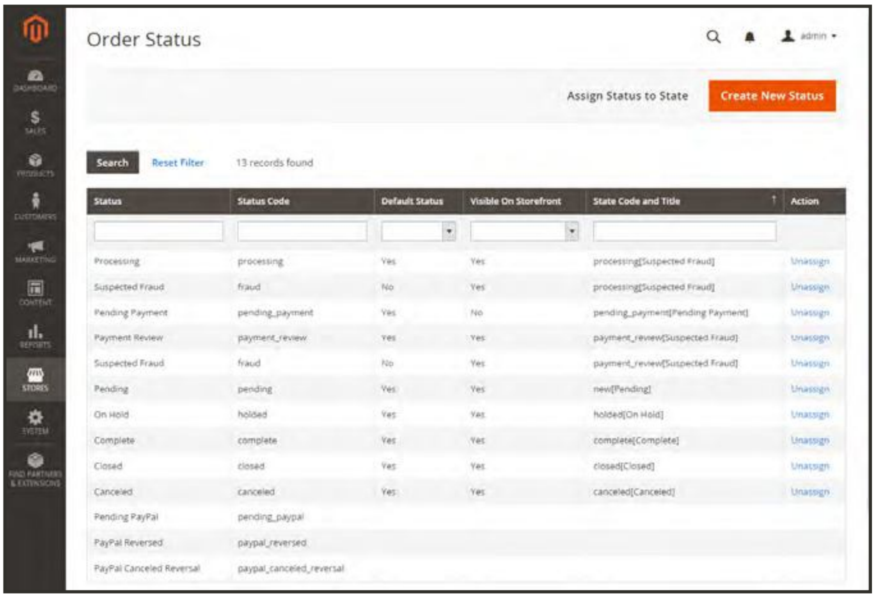
Order Status Workflow



Custom Order Status

In addition to the preset order status settings, you can create custom order status settings of your own, assign them to order states, and set a default order status for order states. For example, you might need a custom order status for orders such as "packaging" or "backordered," or for a status that is specific to your needs. You can create a descriptive name for the custom status, and assign it to the associated order state in the workflow.

> Only default custom order status values are used in the order workflow. Custom status values that are not set as default can be used only in the comments section of the order.

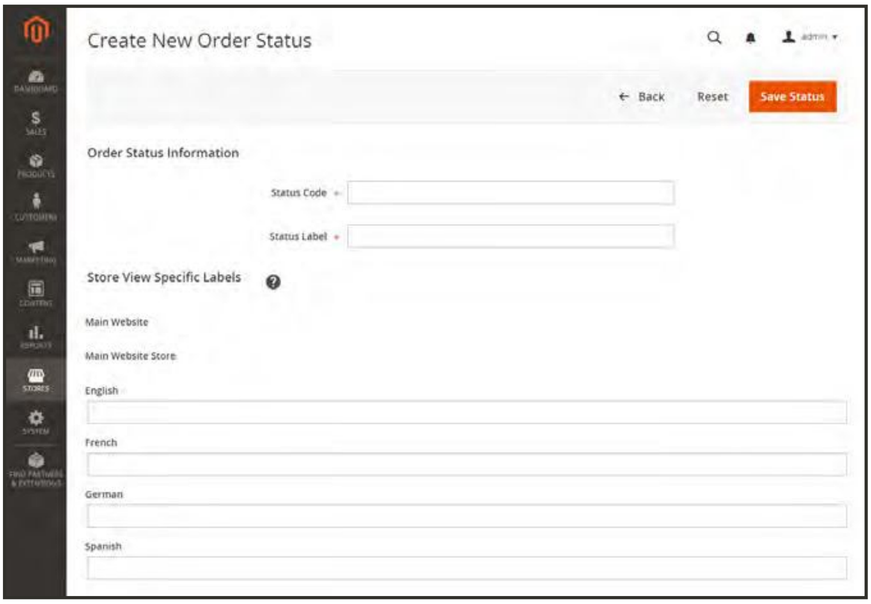


Order Status Settings

To create a custom order status:

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

2. In the upper-right corner, tap **Create New Status**.



Create New Order Status

3. Under **Order Status Information** section, do the following:

   a. Enter a **Status Code** for internal reference. The first character must be a letter (a-z), and the rest can be any combination of letters and numbers (0-9). Use the underscore character instead of a space.

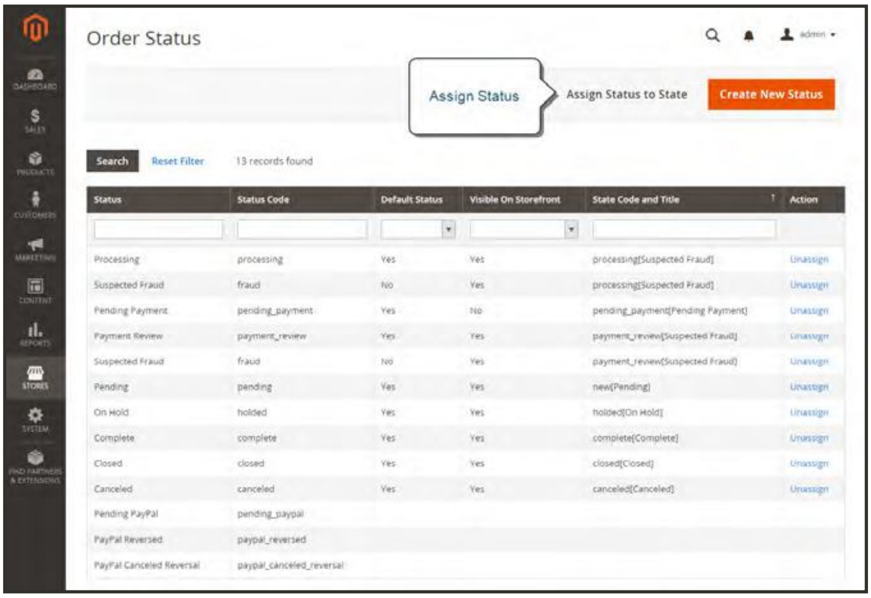
   b. Enter a **Status Label** to identify the status setting in both the Admin and storefront.

4. In the **Store View Specific Labels** section, enter any labels that are needed for different store views.

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

To assign an order status to a state:

1. On the Order Status page, tap **Assign Status to State**.



Assign Status

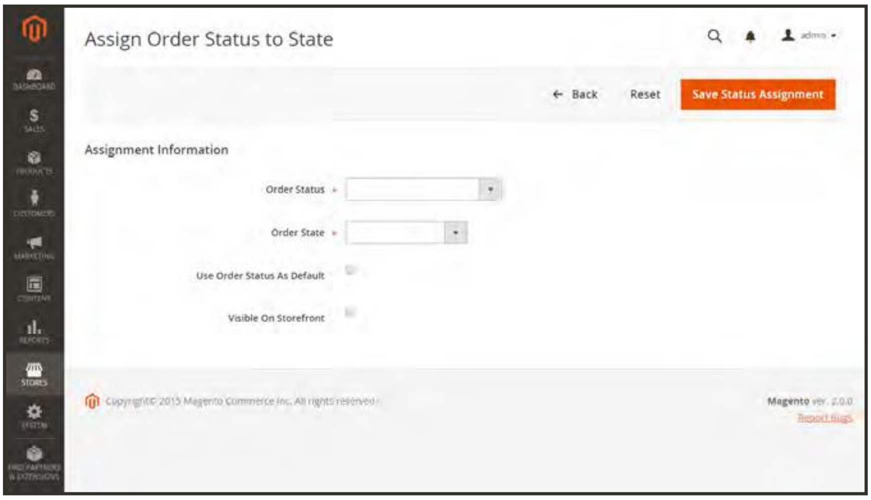
2. In the **Assignment Information** section, do the following:

   a. Choose the **Order Status** that you want to assign. They are listed by status label.

   b. Set **Order State** to the place in the workflow where the order status belongs.

   c. To make this status the default for the order state, mark the **Use Order Status as Default** checkbox.

   d. To make this status visible from the storefront, mark the **Visible On Storefront** checkbox.



Assign Status to State

3. When complete, tap **Save Status Assignment**.

To edit an existing order status:

1. In the Order Status grid, open the status record in edit mode.
2. Update the status settings as needed.
3. When complete, tap **Save Status**.

To remove an order status from an assigned state:

> A status setting cannot be unassigned from a state if the status is currently in use.

1. In the Order Status grid, find the order status record to be unassigned.
2. In the **Action** column on the far right of the row, tap the **Unassign** link.

   A message appears at the top of the workspace that the order status has been unassigned. Although the order status label still appears in the list, it is no longer assigned to a state. Order status settings cannot be deleted.

Order State

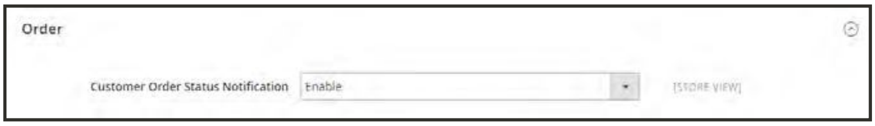
ORDER STATE	
New	
Pending Payment	
Processing	When the state of new orders is set to "Processing," the option to "Automatically Invoice All Items" becomes available in the configuration.

Order State (cont.)

ORDER STATE
Complete
Closed
Canceled
On Hold
Payment Review

Order Status Notification

Customers can track the status of their orders by RSS feed if the Order RSS feed is enabled in the configuration. When enabled, a link to the RSS feed appears on each order.



Customer Order Status Notification

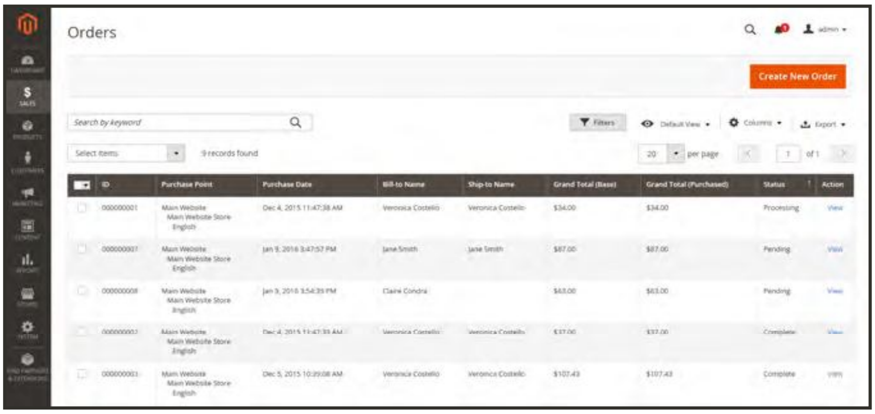
To enable Order Status Notification:

1. On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**
2. In the panel on the left, under **Catalog**, choose **RSS Feeds.**
3. Expand the **Order** section.
4. Set **Customer Order Status Notification** to “Enable”.
5. When complete, tap **Save Config**.

Scheduled Order Operations

Magento cron jobs can be used to schedule the following order management tasks:

- Pending Payment Order Lifetime
- Scheduled Grid Updates



Orders Grid with Pending Orders

Pending Payment Order Lifetime

The lifetime of orders with pending payments is determined by the Orders Cron Settings configuration. The default value is set to 480 minutes, which is eight hours.

To set the lifetime of orders with pending payments:

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 **Orders Cron Settings** section.

Orders Cron Settings

4. In the **Pending Payment Order Lifetime (minutes)** field, enter the number of minutes before a pending payment expires.

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

Scheduled Grid Updates

The Grid Settings configuration schedules updates to the following order management grids, and reindexes the data as scheduled by Cron:

- Orders
- Invoices
- Shipments
- Credit Memos

The benefits of scheduling these tasks is to avoid the locks that occur when data is saved, and to reduce processing time. When enabled, any updates take place only during the scheduled cron job. For best results, Cron should be configured to run once every minute.

To enable scheduled grid updates and reindexing:

1. On the Admin sidebar, tap **Stores.** Then under **Settings**, choose **Configuration.**
2. In the panel on the left under **Advanced**, choose **Developer.**
3. Expand the **Grid Settings** section.
4. Set **Asynchronous Indexing** to “Enable.”

Grid Settings

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