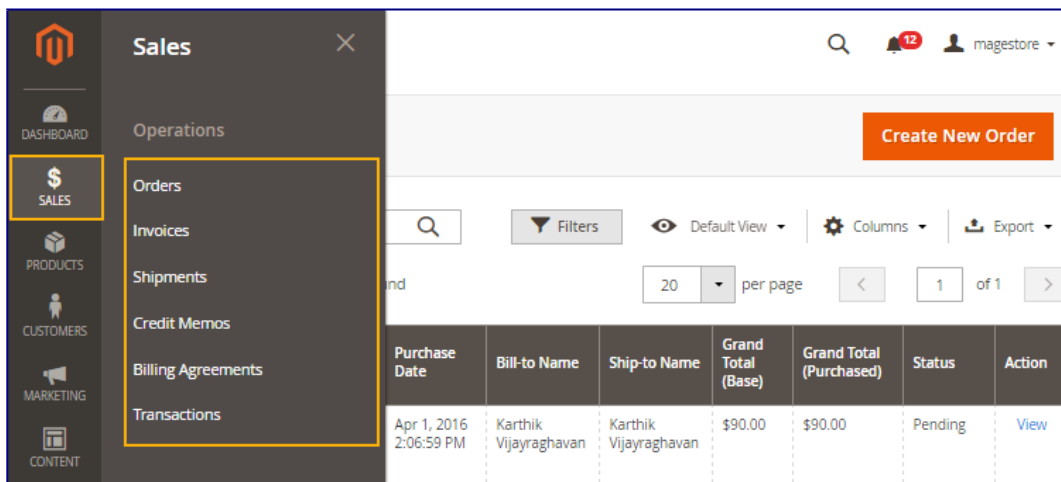


## Introduce the Sales menu

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



## Menu Options

**Orders:**

**Invoices:**

**Shipments:**

**Billing Agreements:**

**Transactions:**

## Order Management

### Order Workspace

Access **Sales > Order** to go to the **Orders Workspace** which lists all current orders. 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, filter the list, change and rearrange columns, and export data.

DASHBOARD  
 SALES  
 PRODUCTS  
 CUSTOMERS  
 MARKETING  
 CONTENT  
 REPORTS  
 STORES  
 SYSTEM

# Orders

Create New Order

Filters

Default View

Columns

Export

Select It... 3 records found

20 per page

	ID ↑	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
<input type="checkbox"/>	000000003	Main Website Main Website Store Default Store View	Apr 1, 2016 2:06:59 PM	Karthik Vijayraghavan	Karthik Vijayraghavan	\$90.00	\$90.00	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000002	Main Website Main Website Store Default Store View	Apr 1, 2016 3:04:45 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	<a href="#">View</a>

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.

# Orders

Filters

Default View

Columns

Export

Create New Order

Select Items

Cancel

Hold

Unhold

Print Invoices

Print Packing Slips

Print Credit Memos

Print All

Print Shipping Labels

3 records found

20

per page

1 of 1

Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
Main Website Main Website Store Default Store View	Apr 1, 2016 2:06:59 PM	Karthik Vijayraghavan	Karthik Vijayraghavan	\$90.00	\$90.00	Pending	<a href="#">View</a>
Main Website Main Website Store Default Store View	Apr 1, 2016 3:04:45 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	<a href="#">View</a>
Main Website Main Website Store Default Store View	Apr 1, 2016 3:04:45 AM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	<a href="#">View</a>

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 that appear in the grid...

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.

## Processing Order

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.

- **To view an order:**

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

**Step 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.

Orders									
<div> <div> <div>Search by keyword</div> <div>Filters</div> <div>Default View</div> <div>Columns</div> <div>Export</div> </div> <div> <div>Create New Order</div> </div> </div>									
<div> <div>Select Items</div> <div>3 records found</div> <div>20 per page</div> <div>1 of 1</div> </div>									
	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
<input type="checkbox"/>	000000003	Main Website Main Website Store Default Store View	Apr 1, 2016 2:06:59 PM	Karthik Vijayraghavan	Karthik Vijayraghavan	\$90.00	\$90.00	Pending	<a href="#">View</a>

- **To edit an order:**

#000000003

Back

Cancel

Send Email

Hold

Invoice

Ship

Edit

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Order & Account Information

Order # 000000003 (The order confirmation email was sent)

Order Date

Apr 1, 2016 2:06:59 PM

Order Status

Pending

Purchased From

Main Website  
Main Website Store  
Default Store View

Placed from IP

199.227.161.66

Account Information

Customer Name

Guest

Email

Magestore@trueplus.vn

Customer Group

NOT LOGGED IN

Address Information

Billing Address

Karthik Vijayraghavan  
916 Saratoga Way  
Coppell, Texas, 75019  
United States  
T: 2104614065

Shipping Address

Karthik Vijayraghavan  
916 Saratoga Way  
Coppell, Texas, 75019  
United States  
T: 2104614065

**Step 1** Find the order to be edited. Then in the Action column, click **View**.

**Step 2** Tap **Edit**. When prompted to confirm, tap OK to continue . Make the necessary changes to the order.

**Step 3** 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**.

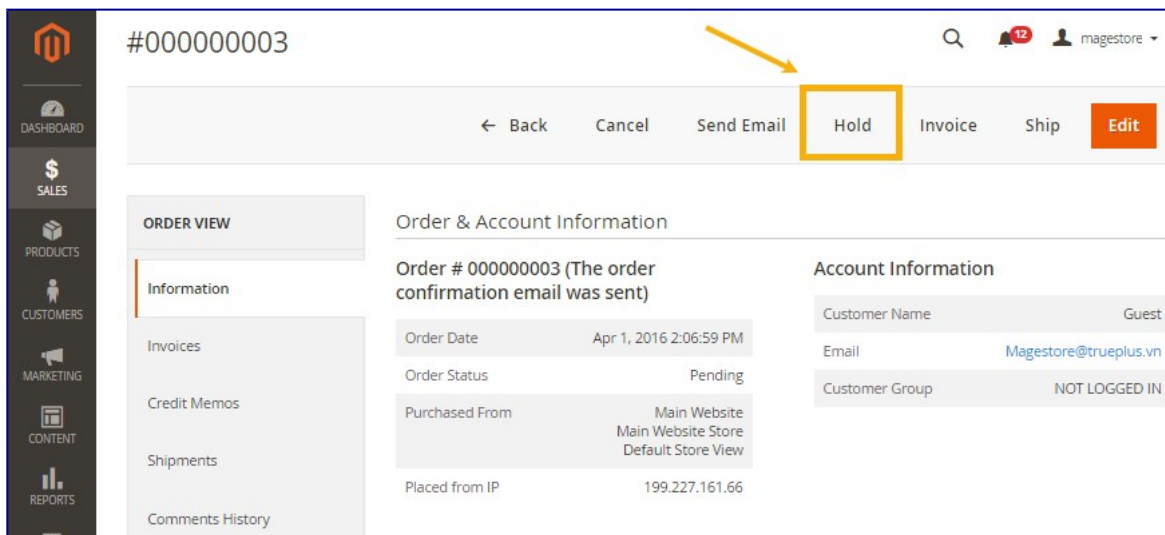
- **To place an order on hold:**

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.

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

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

**Step 3** Tap **Hold** to place the order on hold. (When you are ready to return the order to an active state, repeat the process and tap **Unhold**).



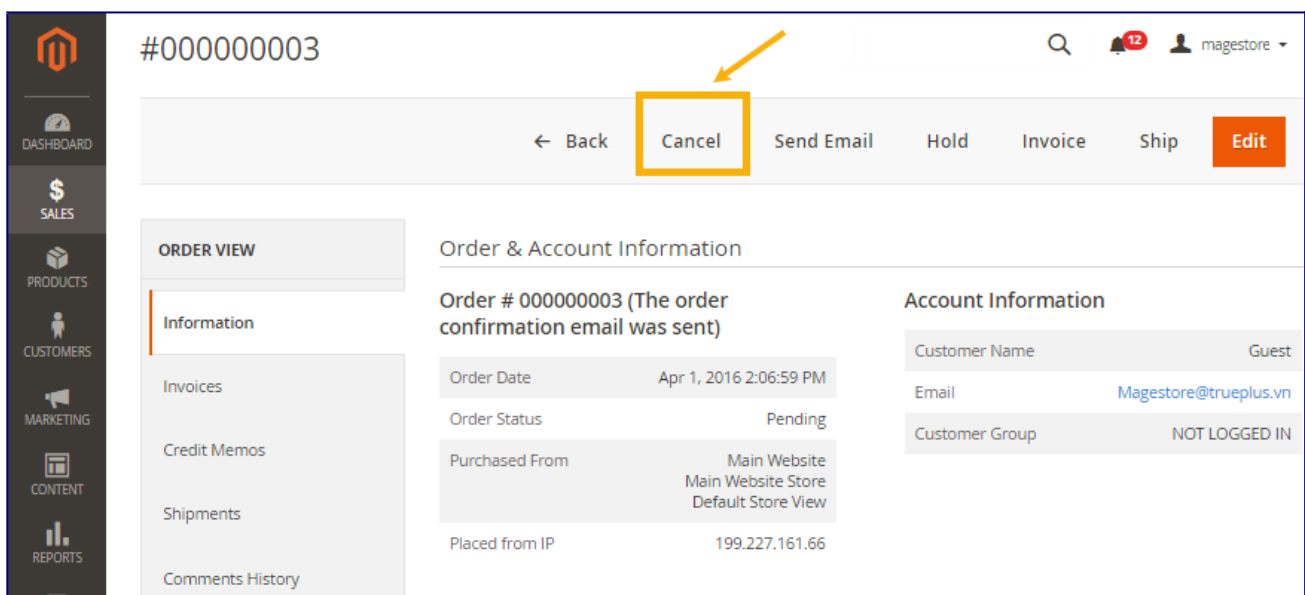
- **To cancel an order :**

Canceling an order changes its status from “Pending” to “Canceled.”

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

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

**Step 3** Tap **Cancel**.



## Create A New Customer 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.

- **To create a new order:**

**Orders**

Search by keyword

Select Items  3 records found 20 per page 1 of 1

<input type="checkbox"/>	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
<input type="checkbox"/>	000000003	Main Website Main Website Store Default Store View	Apr 1, 2016 2:06:59 PM	Karthik Vijayraghavan	Karthik Vijayraghavan	\$90.00	\$90.00	Processing	<a href="#">View</a>

**Step 1** On the Admin sidebar, tap **Sales > Order**. Click on **Create New Order > Create New Customer**. Find the customer in the grid, and open the record in edit mode.

**Create New Order for New Customer in Default Store View**

← Back

Please select a customer

[Reset Filter](#) 2 records found 20 per page 1 of 1

ID	Name	Email	Phone	ZIP/Post Code	Country	State/Province	Signed-up Point
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All Countries <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>
2	test3 test3	test3@gmail.com					Default Store View

**Step 2** Fill the required information in. Remember to add products from the catalog, tap **“Add Products”**.

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

Create New Order for New Customer in Default Store View

Cancel

Submit Order

Items Ordered

Add Products

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
No ordered items						

Account Information

\* Group

General

Email

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

Cancel

Submit Order

Items Ordered

Add Products

Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
Erika Running Short-32-Red SKU: WSH12-32-Red	\$45.00 <input type="checkbox"/> Custom Price*	1	\$45.00	<input checked="" type="checkbox"/> Apply	\$45.00	<div>Please select</div> <div>Please select</div> <div>Remove</div>
Total 1 product(s)	Subtotal:		\$45.00	\$0.00	\$45.00	

\* - Enter custom price excluding tax

Apply Coupon Code

→

Update Items and Quantities

Complete the following sections as needed for the order: Apply Coupon Codes, Payment Method, Shipping Method, Order Comments.

**Step 3** When complete, tap **Submit Order**. A confirmation is sent to the customer, and the customer can view the order details from their account.

## Custom Order Status

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.

The screenshot shows the 'Order Status' configuration page in the Magento 2 Admin. On the left is a sidebar with navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, and SYSTEM. The main content area has a header with 'Order Status', a search icon, a notification bell with '12', and a user profile 'magestore'. Below the header is a section with 'Assign Status to State' and a 'Create New Status' button. A search bar shows '13 records found'. The main table lists the following statuses:

Status	Status Code	Default Status	Visible On Storefront	State Code and Title	Action
Processing	processing	Yes	Yes	processing[Suspected Fraud]	Unassign
Suspected Fraud	fraud	No	Yes	processing[Suspected Fraud]	Unassign
Pending Payment	pending_payment	Yes	No	pending_payment[Pending Payment]	Unassign
Payment Review	payment_review	Yes	Yes	payment_review[Suspected Fraud]	Unassign
Suspected Fraud	fraud	No	Yes	payment_review[Suspected Fraud]	Unassign
Pending	pending	Yes	Yes	new[Pending]	Unassign
On Hold	holded	Yes	Yes	holded[On Hold]	Unassign
Complete	complete	Yes	Yes	complete[Complete]	Unassign

- **To create a custom order status:**

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

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

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

- + Enter a **Status Code** for internal reference.
- + Enter a **Status Label** to identify the status setting in both the Admin and storefront.
- + In the **Store View Specific Labels** section, enter any labels that are needed for different store views.

**Step 4** When complete, tap **Save Status**.

## Allow Reorder Function

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

- **To configure customer reorders :**

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

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

**Step 3** Expand the **Reorder** section. Set **Allow Reorder** to your preference.



Reorder

Allow Reorder
[STORE VIEW]

## Invoices

An invoice is a record payment for an order. Multiple invoices can be created for a single order, and each can include as many or as few of the purchased products that you specify. You can upload a high-resolution logo for a print-ready PDF invoice, and include the Order ID in the header or customize the invoice template with your logo.

### Create an Invoice

Creating an invoice for an order converts the temporary sales order into a permanent record of the order that cannot be canceled. A new invoice page looks similar to a completed order, with some additional fields.

- **To invoice an order:**

Before creating an invoice, you must generated for the order first

**Step 1** On the **Admin** sidebar, tap **Sales > Orders**.

**Step 2** Find the order in the grid, select an order that you want to invoice. In the Action column, click **View**.

Orders
12
magestore

Create New Order

Search by keyword
Filters
Default View
Columns
Export

Select Items
3 records found
20 per page
1 of 1

	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
<input type="checkbox"/>	000000003	Main Website Main Website Store Default Store View	Apr 1, 2016 2:06:59 PM	Karthik Vijayraghavan	Karthik Vijayraghavan	\$90.00	\$90.00	Pending	<a href="#">View</a>

In the upper-right corner, tap **Invoice**. The new invoice page looks similar to a completed order page, with additional fields that can be edited.

#000000001

← Back Send Email Credit Memo Hold Reorder

Search by keyword  Filters

Select I... 1 records found 20 per page 1 of 1

	Invoice	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
<input type="checkbox"/>	000000001	Apr 1, 2016 3:04:45 AM	000000001	Apr 1, 2016 3:04:45 AM	Veronica Costello	Paid	\$34.00	<a href="#">View</a>

**Step 3** Check all the information then tap **“Print”** to print invoice:

#000000001

← Back Send Email **Print**

Order & Account Information

**Order # 000000001** (The order confirmation email is not sent)

Order Date: Apr 1, 2016 3:04:45 AM

Order Status: Processing

Purchased From: Main Website, Main Website Store, Default Store View

Account Information

Customer Name: Veronica Costello

Email: roni\_cost@example.com

Customer Group: General

Address Information

**Billing Address** [Edit](#)

Veronica Costello  
6146 Honey Bluff Parkway  
Calder, Michigan, 49628-7978  
United States

**Shipping Address** [Edit](#)

Veronica Costello  
6146 Honey Bluff Parkway  
Calder, Michigan, 49628-7978  
United States

## 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.

- **To view or print a shipment record:**

**Step 1** On the **Admin** sidebar, tap **Sales > Shipments**.

**Step 2** Select a shipment record that you want to view. In the Action column, click on **“View”**, then click on **“Print”** button.

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

# Shipments

Search by keyword

Filters

Default View

Columns

Export

Select Items

2 records found

20 per page

<

1 of 1

>

	Shipment	Ship Date	Order	Order Date	Ship-to Name	Total Quantity	Action
<input type="checkbox"/>	000000001	Apr 1, 2016 3:04:45 AM	000000001	Apr 1, 2016 3:04:45 AM	Veronica Costello	1.0000	<a href="#">View</a>
<input type="checkbox"/>	000000002	Apr 1, 2016 3:04:46 AM	000000002	Apr 1, 2016 3:04:45 AM	Veronica Costello	1.0000	<a href="#">View</a>

## Credit memo

A credit memo is a document that shows the amount that is owed to the customer. 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.

- **To create a credit memo:**

**Step 1** On the Admin sidebar, tap **Sales > Orders**.

**Step 2** Find a **completed order** in the grid. Then click **“View”** to open that completed order.

Orders

12

magestore

Create New Order

Search by keyword

Filters

Default View

Columns

Export

Select Items

3 records found

20 per page

1 of 1

	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
<input type="checkbox"/>	000000002	Main Website Main Website Store Default Store View	Apr 1, 2016 3:04:45 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	<a href="#">View</a>

**Step 3** Tap **“Credit Memo”** button in the upper right corner (this button appears only after an order is invoiced) and update the necessary information.

#000000002

Search

12

magestore

Back

Send Email

Credit Memo

Reorder

ORDER VIEW

Information

Invoices

Credit Memos

Shipments

Comments History

Order & Account Information

Order # 000000002 (The order confirmation email is not sent)

Order Date

Apr 1, 2016 3:04:45 AM

Order Status

Complete

Purchased From

Main Website  
Main Website Store  
Default Store View

Account Information

Customer Name

Veronica Costello

Email

roni\_cost@example.com

Customer Group

General

Address Information

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 (if an online payment method was used, you will not be able to edit these fields).

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Overnight Duffel SKU: 24-WB07	\$45.00	Ordered 1 Invoiced 1 Shipped 1	<input type="checkbox"/>	<input type="text" value="0"/>	\$45.00	\$3.71	\$0.00	\$48.71
Affirm Water Bottle SKU: 24-UG06	\$7.00	Ordered 1 Invoiced 1 Shipped 1	<input checked="" type="checkbox"/>	<input type="text" value="1"/>	\$7.00	\$0.58	\$0.00	\$7.58
Harmony Lumaflex™ Strength Band Kit SKU: 24-UG03	\$22.00	Ordered 1 Invoiced 1 Shipped 1	<input type="checkbox"/>	<input type="text" value="0"/>	\$22.00	\$1.82	\$0.00	\$23.82
Pursuit Lumaflex™ Tone Band SKU: 24-UG02	\$16.00	Ordered 1 Invoiced 1 Shipped 1	<input type="checkbox"/>	<input type="text" value="0"/>	\$16.00	\$1.32	\$0.00	\$17.32

Update Qty's

**\_Return to Stock:** If the product is to be returned to inventory, mark the checkbox.

**\_ Qty to Refund:** Enter the number of items to be returned. Then tap “**Update Qty’s**” button.

Scroll down to the **Refund Totals** section and do the following:

<b>Order Total</b>	
<hr/>	
<b>Credit Memo Comments</b>	
Comment Text	
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>	
<hr/>	
<b>Refund Totals</b>	
Subtotal	\$0.00
Refund Shipping	<input type="text" value="0"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Tax	\$0.00
<b>Grand Total</b>	<b>\$0.00</b>
<input type="checkbox"/> Append Comments <input type="checkbox"/> Email Copy of Credit Memo	
<div style="background-color: #f4a460; padding: 10px; text-align: center; font-weight: bold; color: white;">Refund Offline</div>	

**\_ Refund Shipping:** 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.

**\_ Adjustment Refund:** 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).

**\_ Adjustment Fee:** 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.

**Credit Memo Comments:** Enter the text in the box to add a comment.

**Email Copy of Credit Memo:** Mark the checkbox to send an email notification to the customer.

**\_Append Comments:** Mark the checkbox to include the comments you have entered in the email.

**Step 4** To complete the process and generate the credit memo, choose one of the following refund option buttons, according to the payment type: **“Refund Offline”** or **“Refund Online”**.

- **To view any credit memos:**

In admin sidebar on the left, choose **Sales > Credit Memos**. Any credit memos that are associated with this order appear in the list.

Dashboard

Sales

Products

Customers

Marketing

Operations

Orders

Invoices

Shipments

Credit Memos

Billing Agreements

Transactions

Search

Filters

Default View

Columns

Export

20 per page

1 of 1

	Order	Order Date	Bill-to Name	Status	Refunded	Action
3:04:46 AM	000000002	Apr 1, 2016 3:04:45 AM	Veronica Costello	Refunded	\$5.00	View

## 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.

The screenshot shows the 'Billing Agreements' page in the Magento Admin interface. On the left is a sidebar with navigation links: DASHBOARD, SALES (highlighted), PRODUCTS, CUSTOMERS, MARKETING, and CONTENT. The main content area has a title 'Billing Agreements' and a search bar. Below the search bar, it says '0 records found'. There are pagination controls showing '20 per page' and '1 of 1'. A table with 8 columns is shown: ID, Email, First Name, Last Name, Reference ID, Status, Created, and Updated. Each column has a 'From' and 'To' filter box. The table is empty, and a message at the bottom says 'We couldn't find any records.'

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.

- **To view billing agreements:**

In admin sidebar on the left, choose **Sales > Billing Agreements**.

## 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.

The screenshot shows the 'Transactions' page in the Magento Admin interface. On the left is a sidebar with navigation links: DASHBOARD, SALES (highlighted), PRODUCTS, CUSTOMERS, MARKETING, and CONTENT. The main content area has a title 'Transactions' and a search bar. Below the search bar, it says '0 records found'. There are pagination controls showing '20 per page' and '1 of 1'. A table with 8 columns is shown: ID, Order ID, Transaction ID, Parent Transaction ID, Payment Method, Transaction Type, Closed, and Created. Each column has a 'From' and 'To' filter box. The table is empty, and a message at the bottom says 'We couldn't find any records.'

To view transactions, in **Admin** sidebar on the left, choose **Sales > Transactions**.