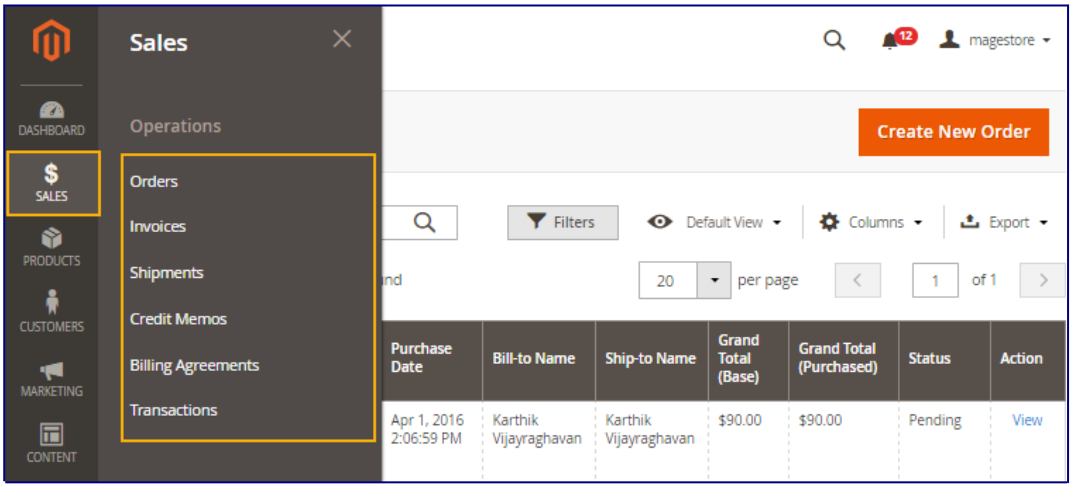
Introduce the Sales menu

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:

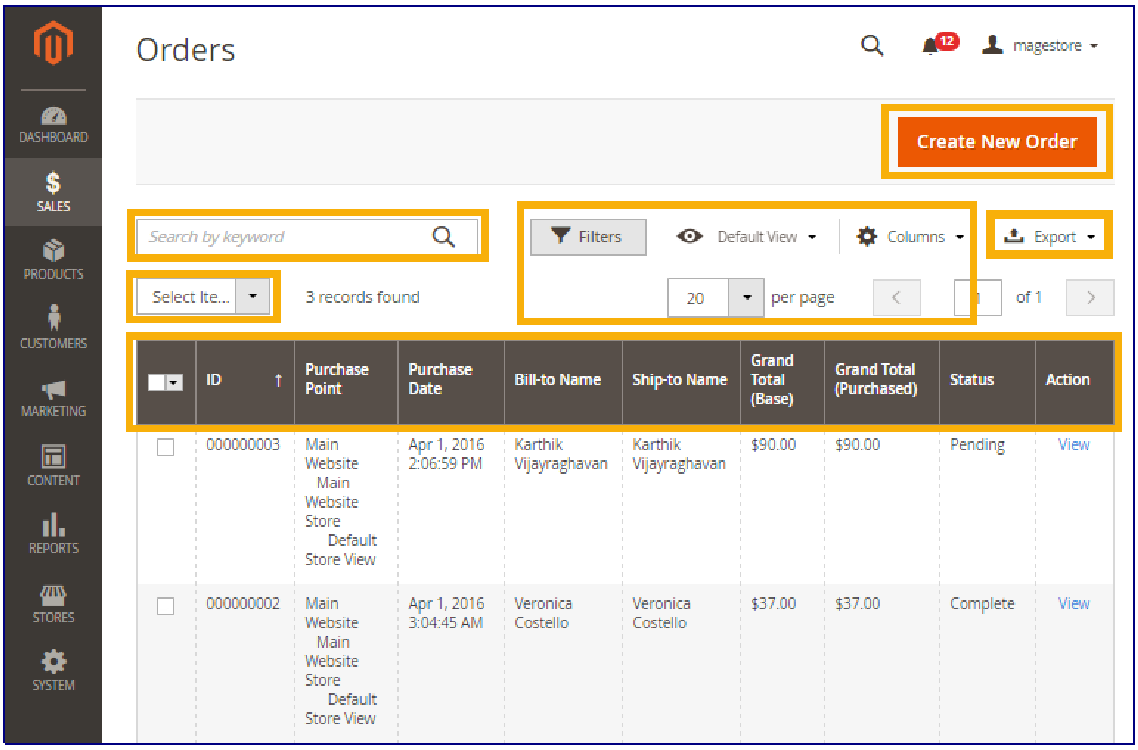
Billing Agreements:

Transactions:

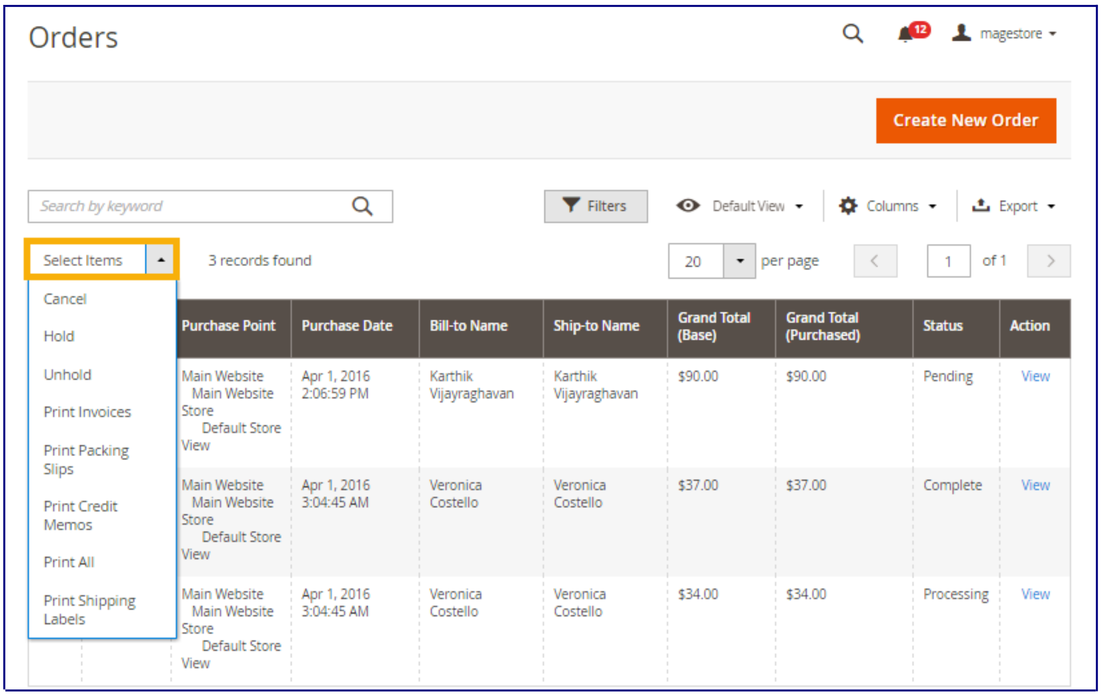
Order Management

Order Workspace

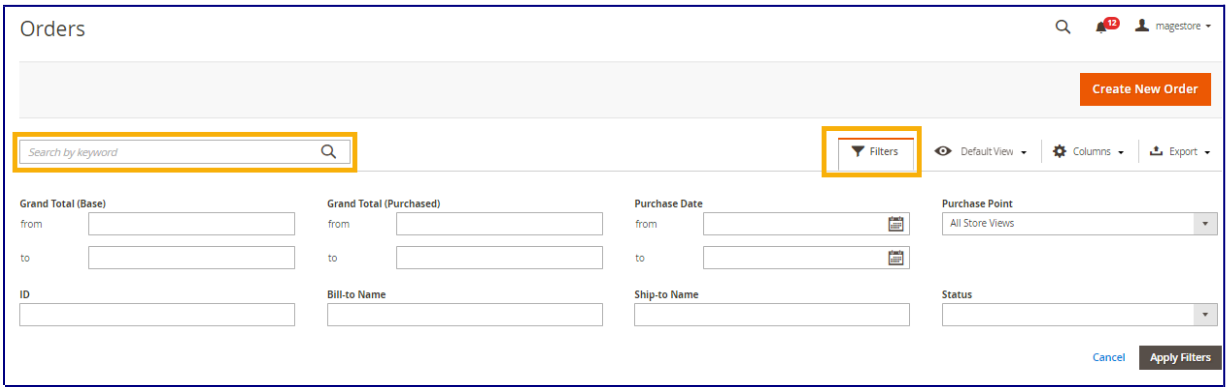
Access **Sales** > **Order** to go to the **Orders Workspace** which lists all current orders. Use the standard controls to sort and filter the list, find orders, and apply actions to selected orders. You can view existing orders, and create new orders, filter the list, change and rearrange columns, and export data.



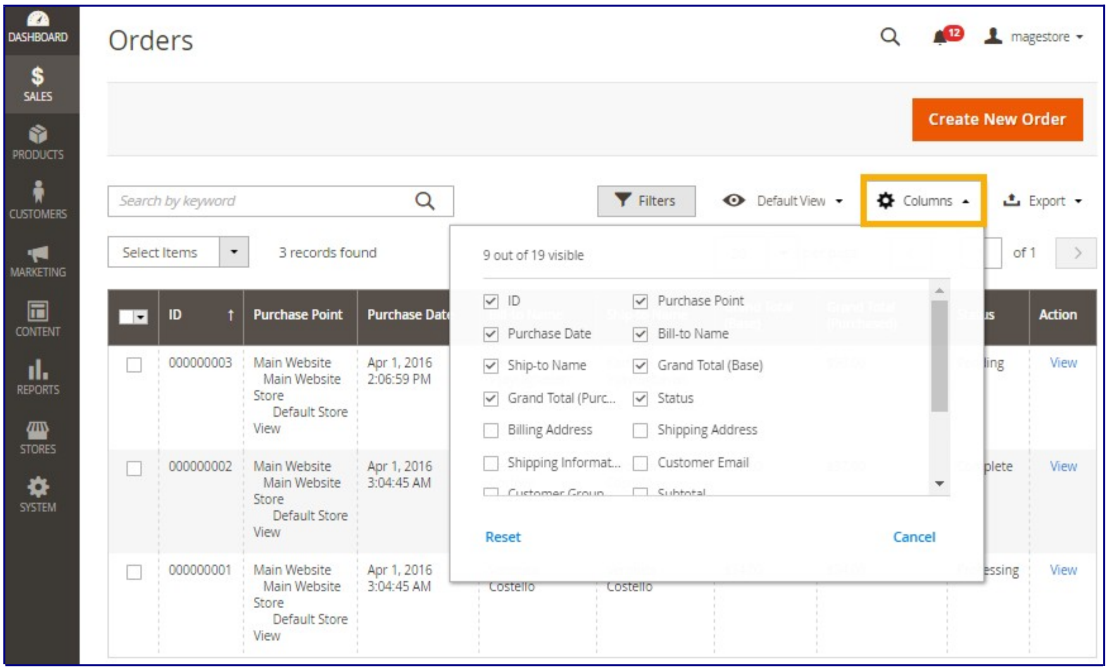
To apply an action to specific orders, mark the checkbox in the first column of each order. To select or deselect all orders, use the control at the top of the column.



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.

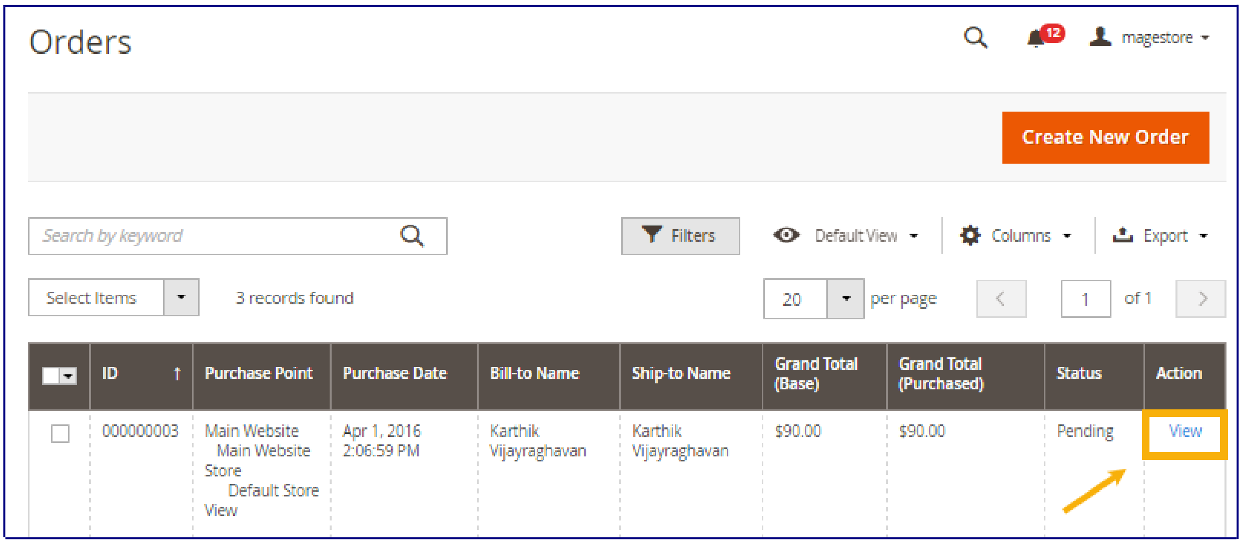
- **To view an order:**

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

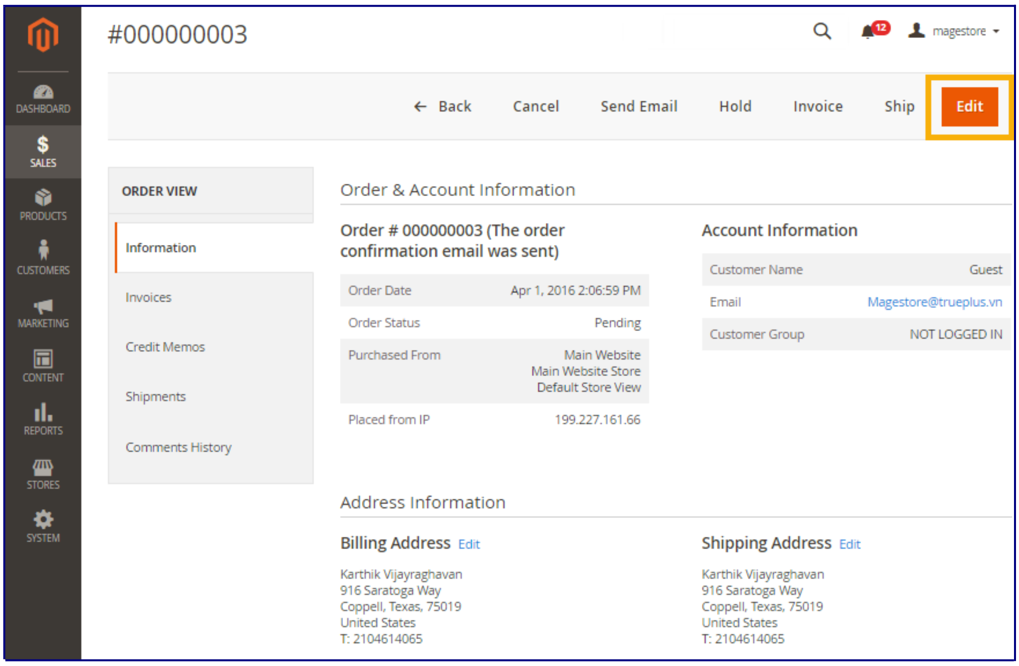
Step 2 Find the order in the grid, and in the **Action** column, click **View**.

– A pending order can be modified, put on hold, canceled, or invoiced and shipped.

– A completed order can be reordered.



- **To edit an order:**



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**.

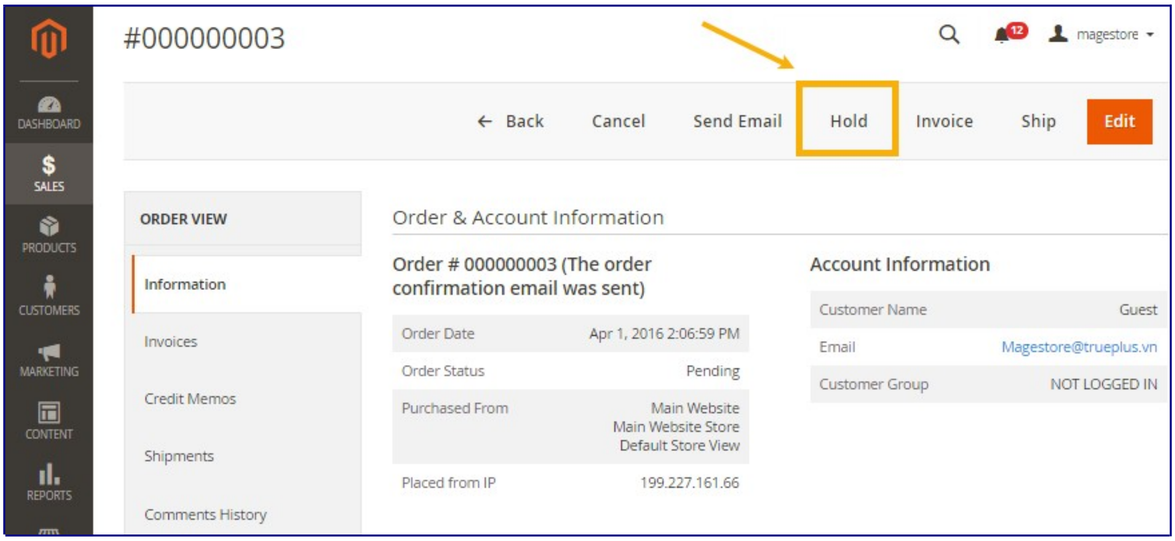
- **To place an order on hold**:

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).*



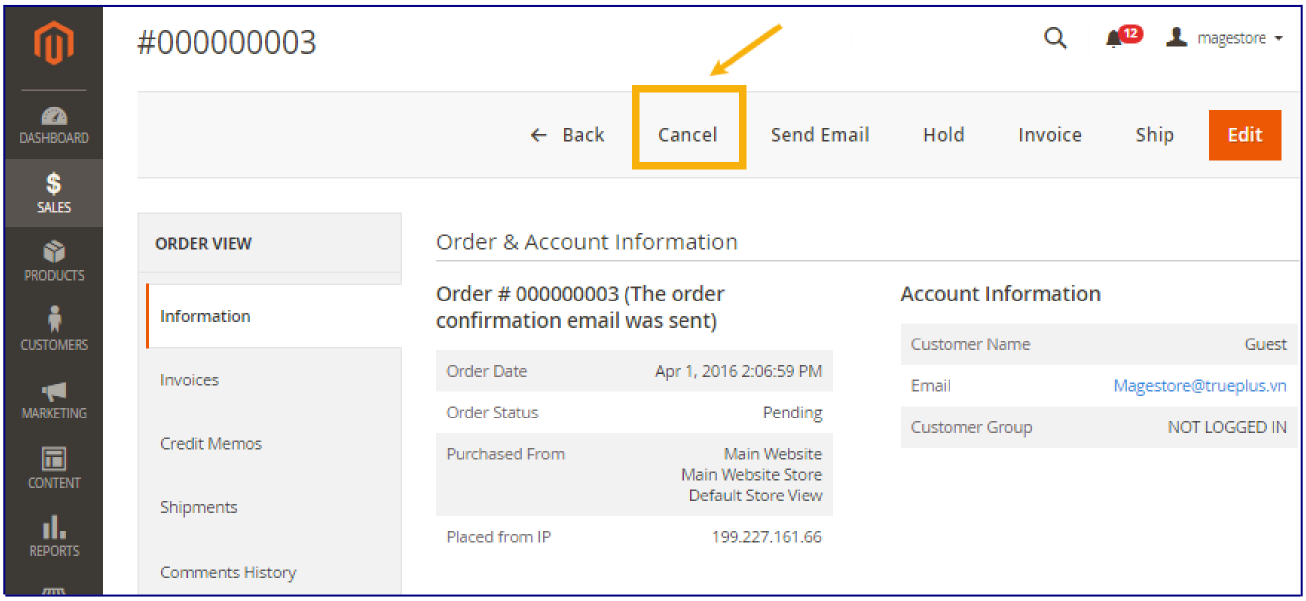
- **To cancel an order** :

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**.

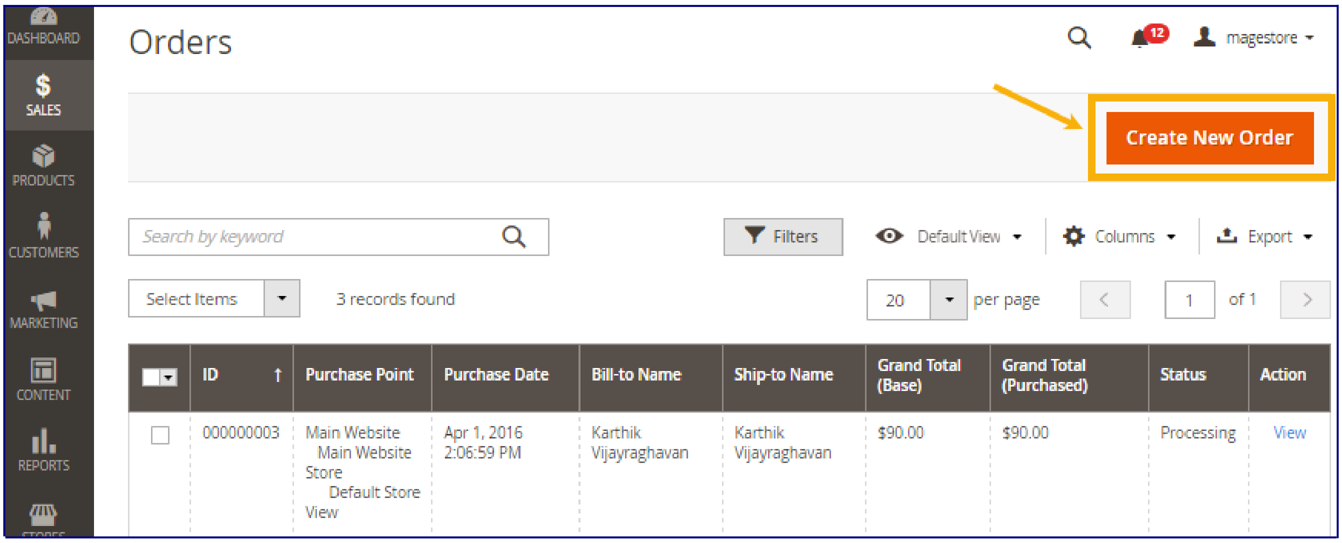
Step 3 Tap **Cancel**.



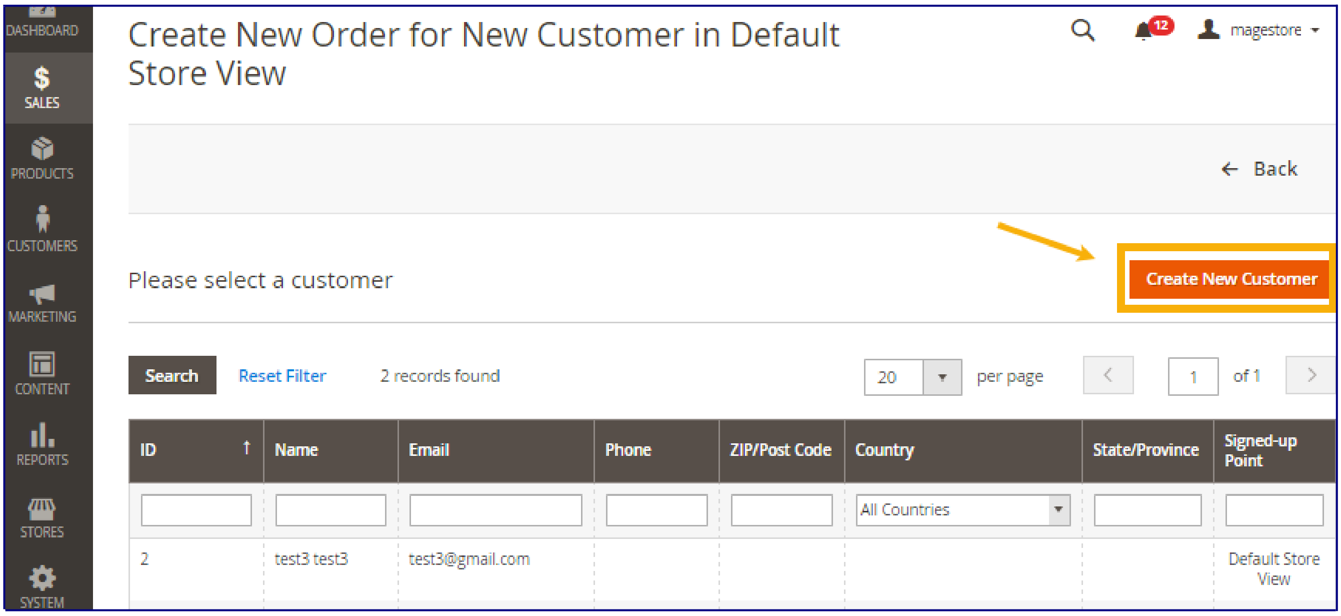
Create A New Customer Order

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.

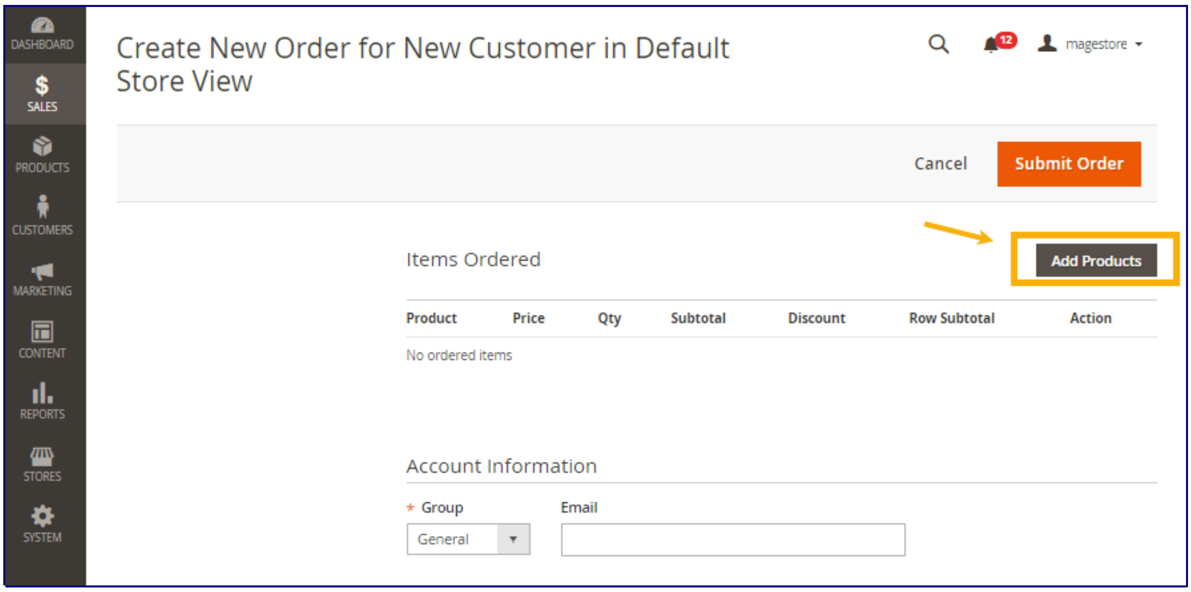
- **To create a new order**:



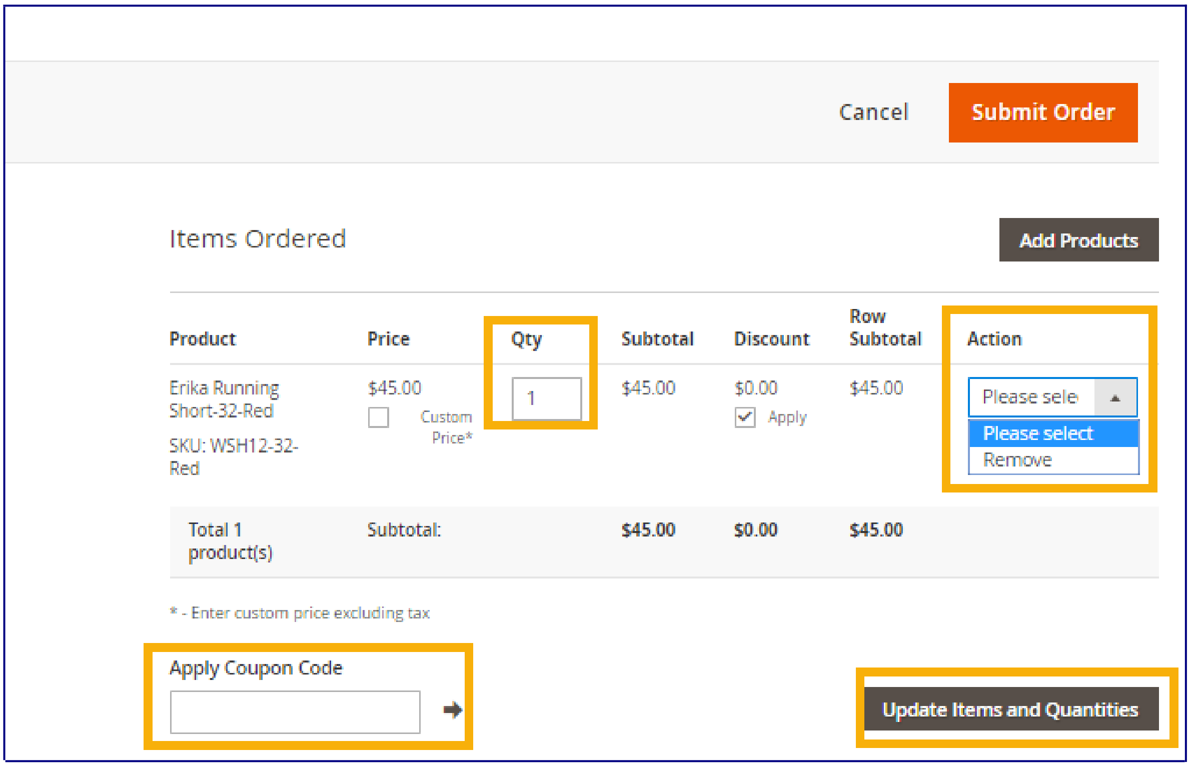
Step 1 On the Admin sidebar, tap **Sales > Order**. Click on **Create New Order > Create New Customer**. Find the customer in the grid, and open the record in edit mode.



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



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**.

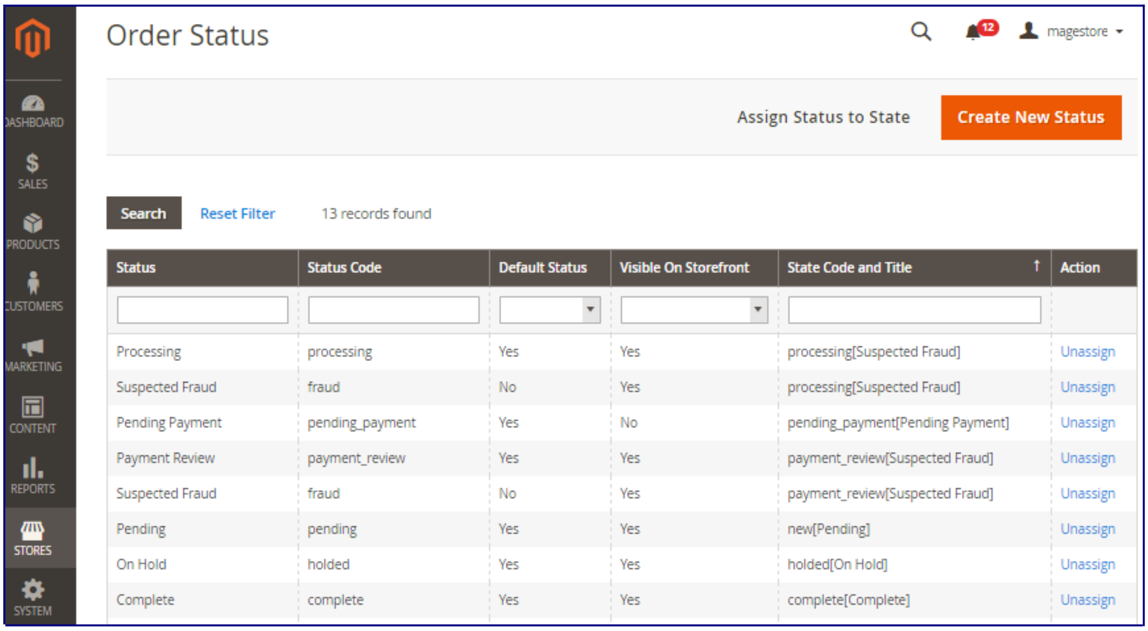


Complete the following sections as needed for the order: Apply Coupon Codes, Payment Method, Shipping Method, Order Comments.

Step 3When 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.



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

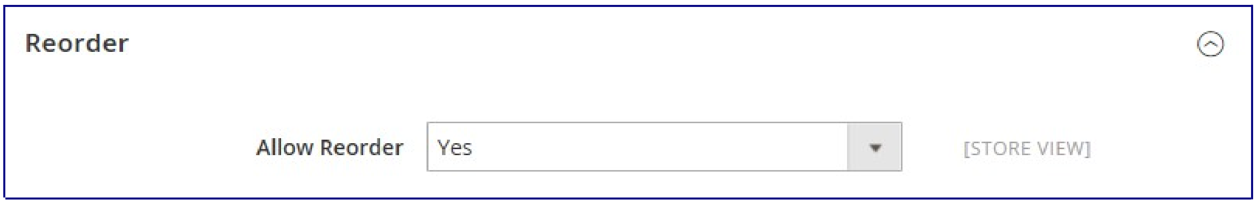
When enabled, reorders can be made directly from the customer account or from the original order in the Admin. Reorders are enabled by default.

- **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.



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

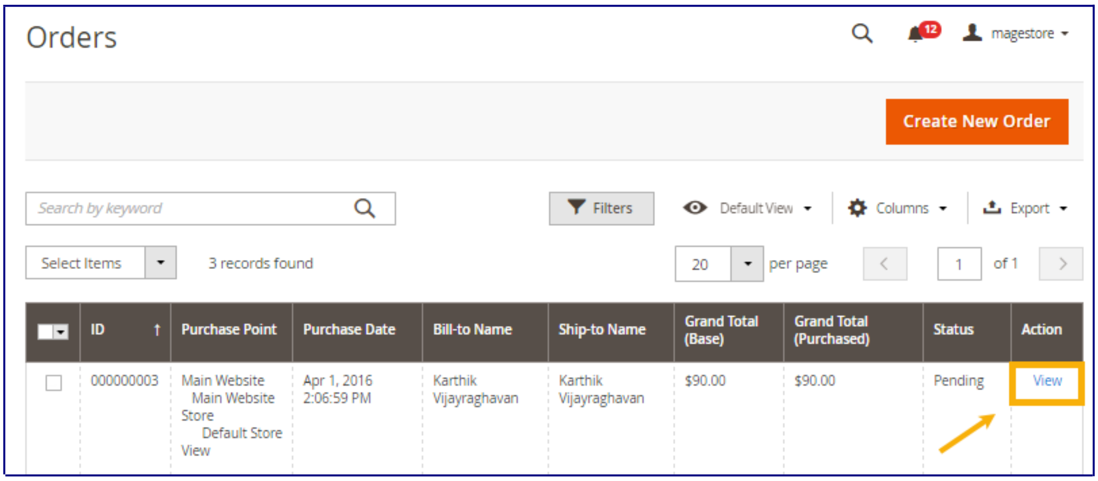
Creating an invoice for an order converts the temporary sales order into a permanent record of the order that cannot be canceled. A new invoice page looks similar to a completed order, with some additional fields.

- **To invoice an order**:

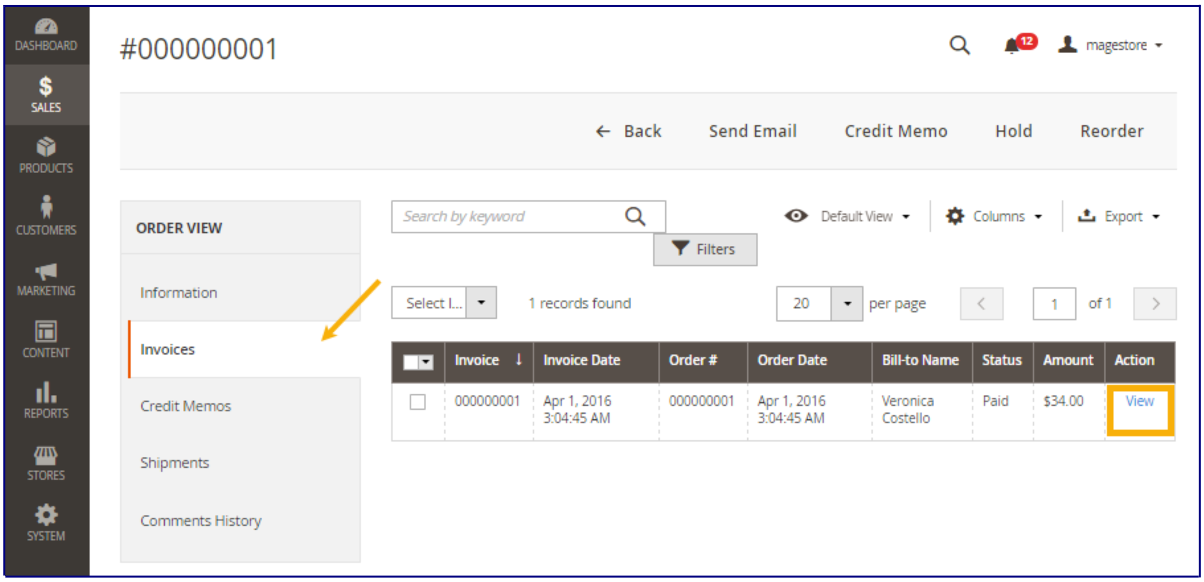
Before creating an invoice, you must generated for the order first

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

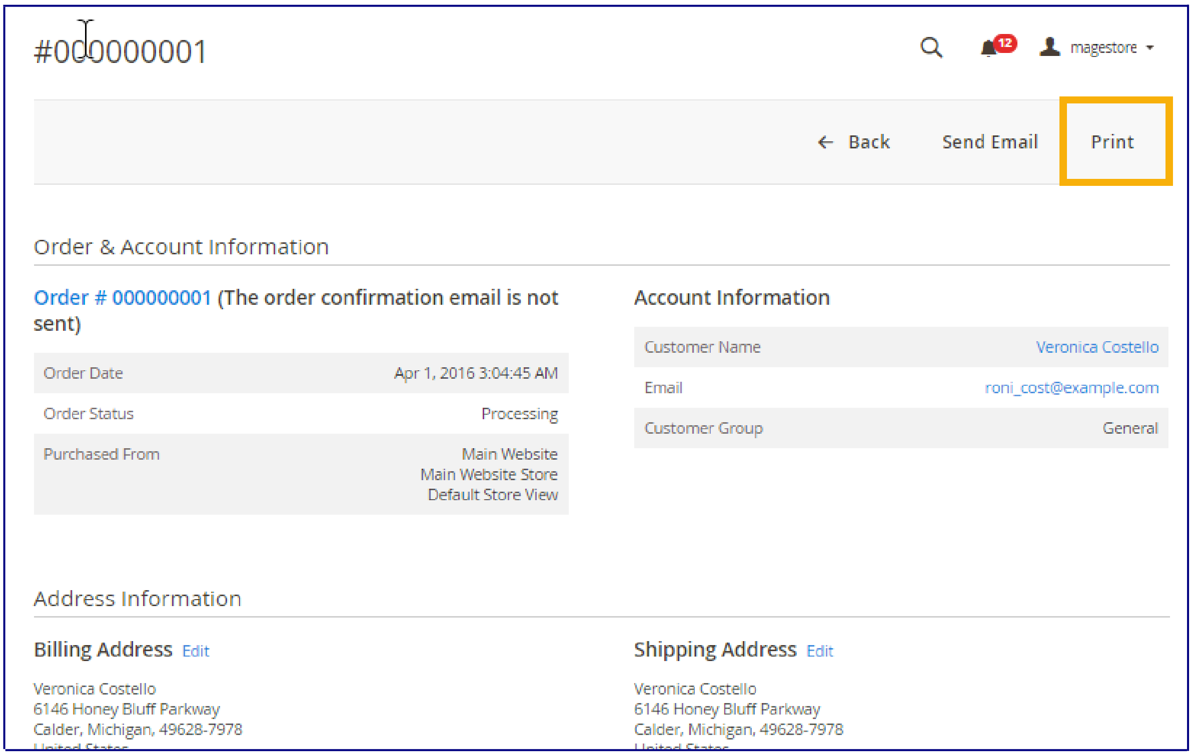
Step 2 Find the order in the grid, select an order that you want to invoice. In the Action column, click **View**.



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.



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



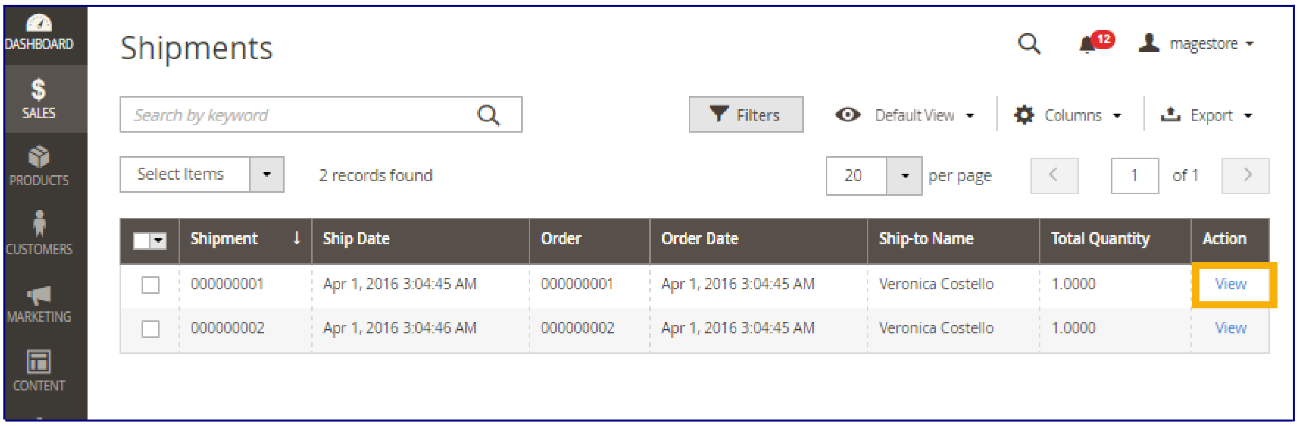
Shipments

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.



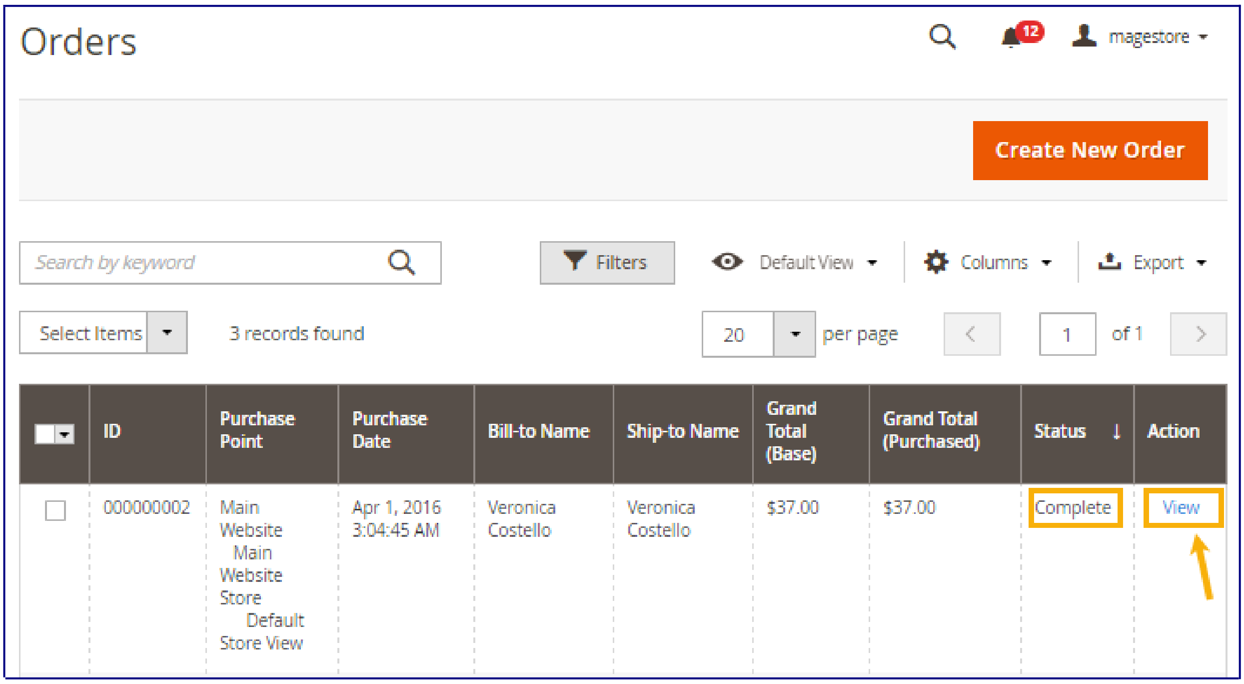
Credit memo

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.

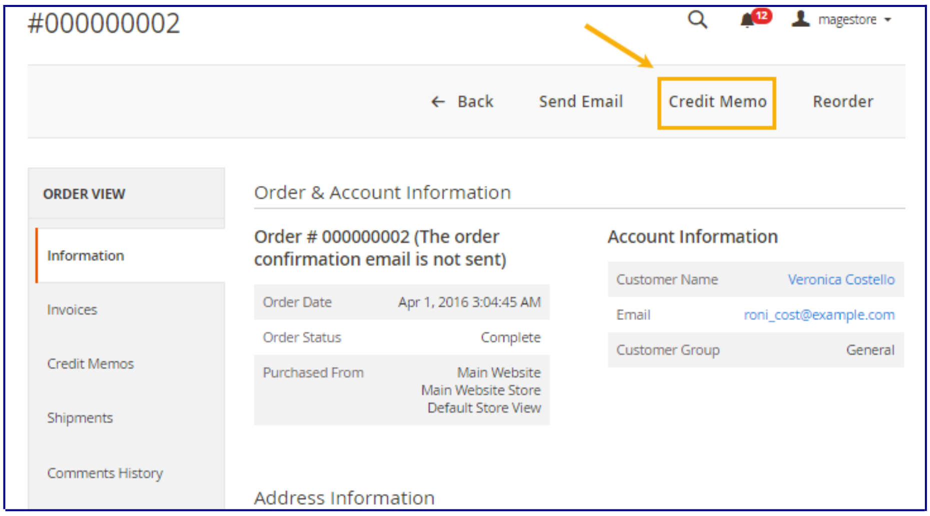
- **To create a credit memo**:

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

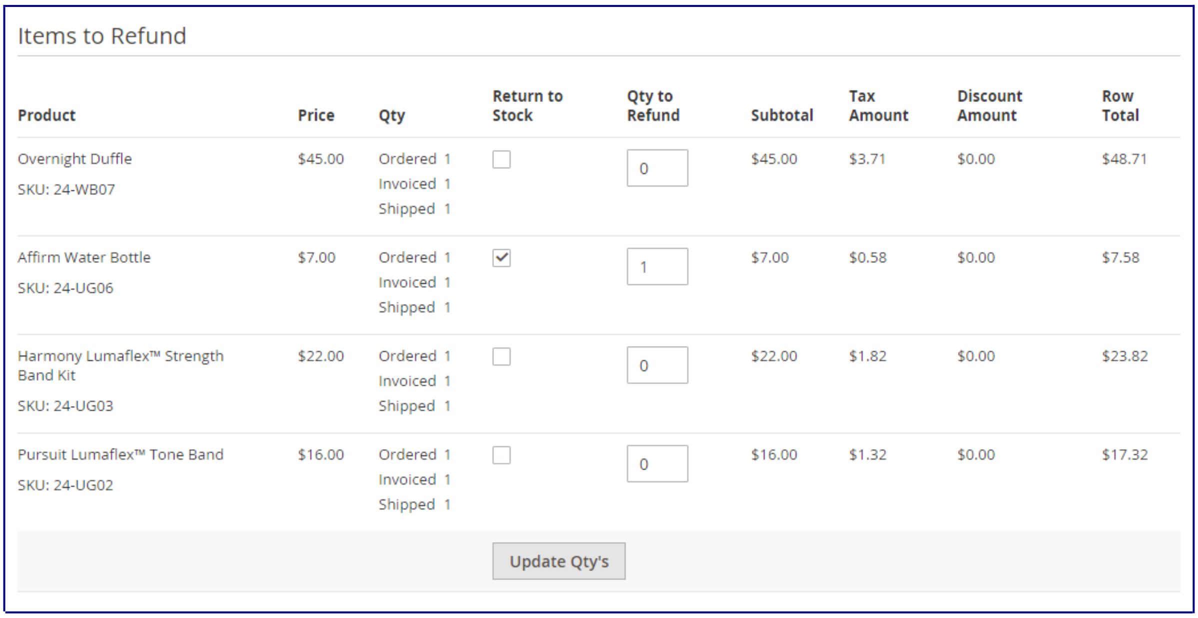
Step 2 Find a **completed order** in the grid. Then click **"View"** to open that completed order.



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.



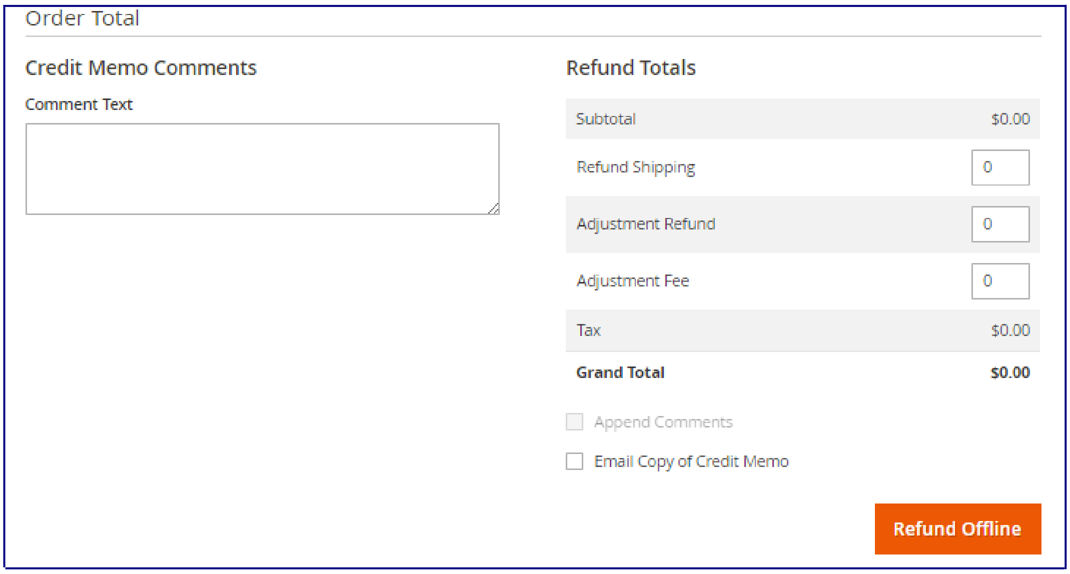
The New Credit Memo page looks similar to the completed order page, with an Items to Refund section that lists each item from the invoice (if an online payment method was used, you will not be able to edit these fields).



_ **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:



_ **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.

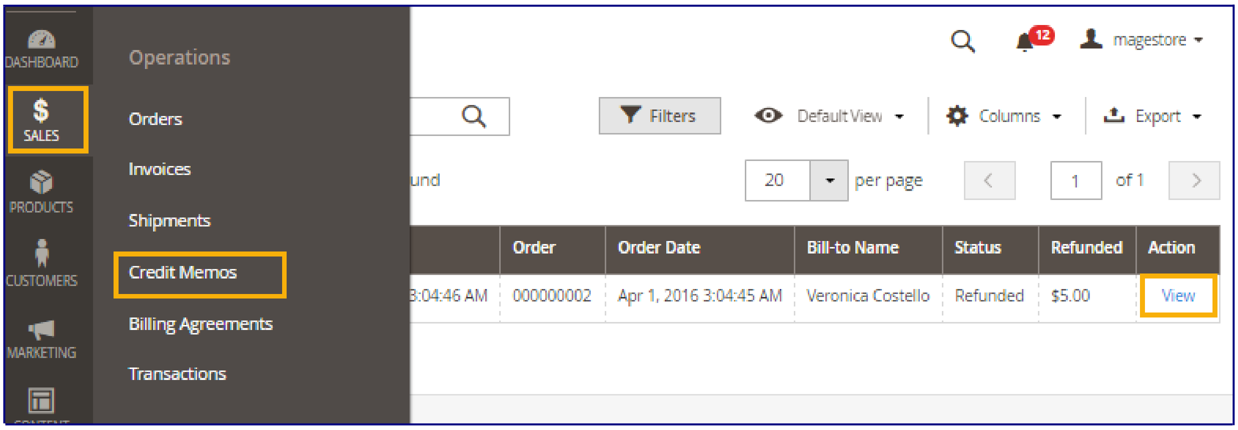
_ **Email Copy of Credit Memo:** Mark the checkbox to send an email notification to the customer.

_ **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**".

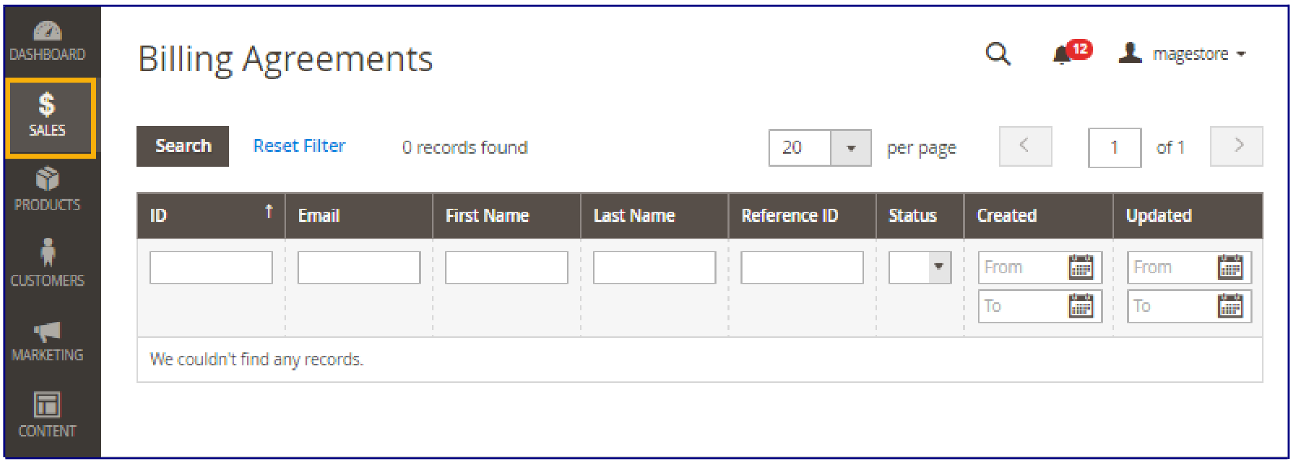
- **To view any credit memos**:

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



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.



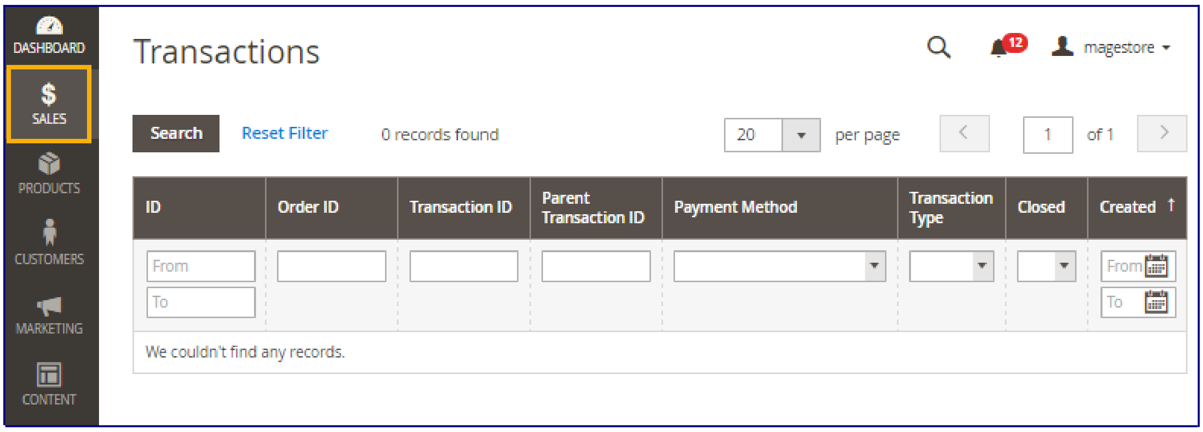
Each record includes general information about the billing agreement, and all sales orders that have used it as a payment method. The store administrator can view, cancel, or delete customer's billing agreements. A canceled billing agreement can be deleted only by the store administrator.

- **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.



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