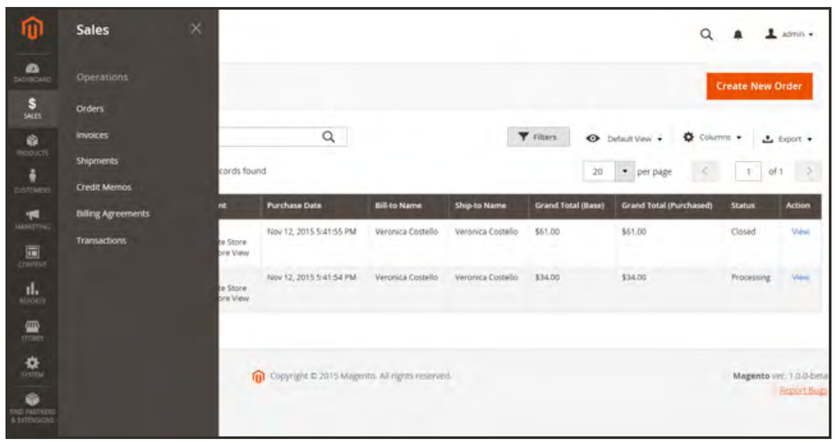
SALES

Contents

CHAPTER 42:

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

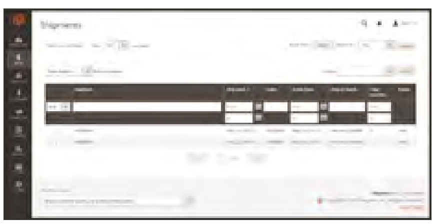
Menu Options

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.

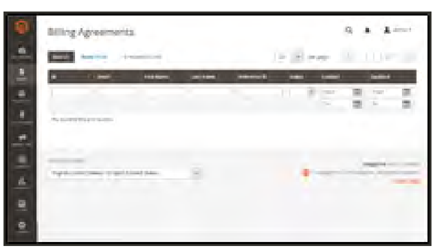
Invoices

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.



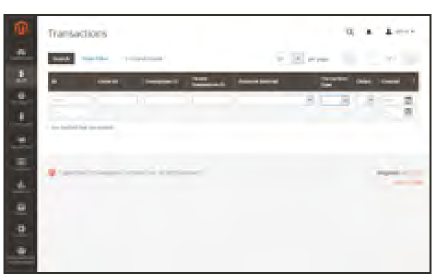
Shipments

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.

Order Management

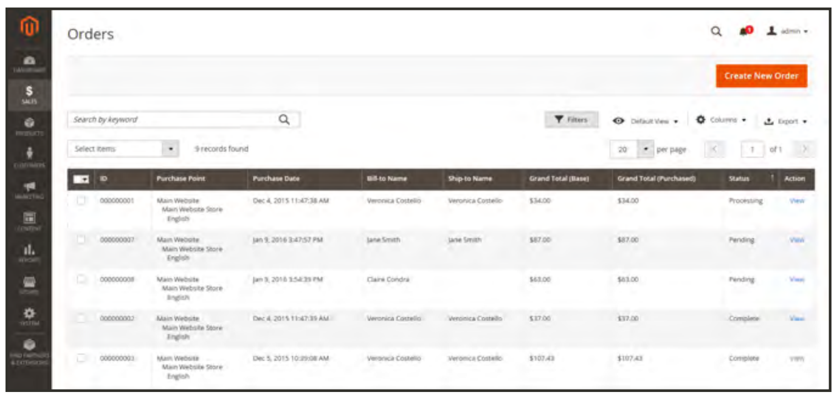
In this section of the guide, you will learn about each stage of the order workflow, and how to process orders, create invoices, and shipments. You will also learn how to issue credit memos and manage returns.

Contents

CHAPTER 43:

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

Workspace Controls

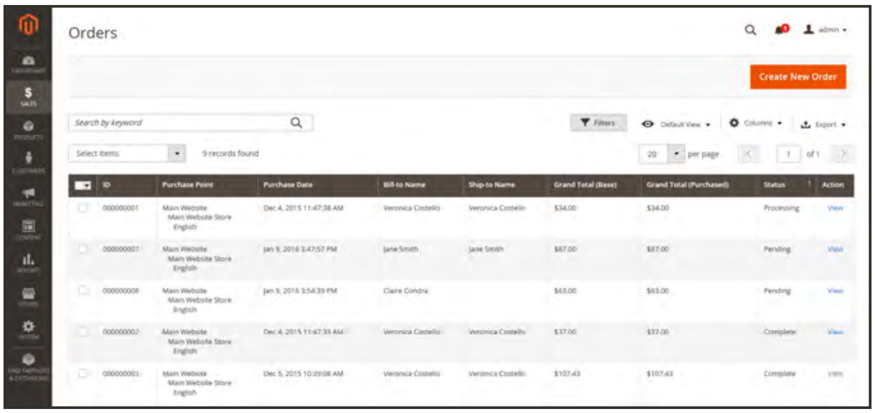
CONTROL	DESCRIPTION
Search	Initiates a search for orders based on keywords entered in the search box, and current filters.
Create New Order	Creates a new order.
Go to Archive	Displays the list of archived orders.
Search	Initiates a search for orders based on the current filters.
Reset Filter	Restores all filters to a blank state.
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 Move to Archive
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, and Unselect Visible
Submit	Applies the current action to the selected order records.
Edit	Opens the order in edit mode.

Columns

COLUMN	DESCRIPTION
Selection State	Filters the list of orders based on checkbox status. Options: Any — Lists all records, regardless of checkbox status. Yes — Lists only records with the checkbox marked. No — Lists only records without the checkbox marked.
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	The View link opens the order.

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

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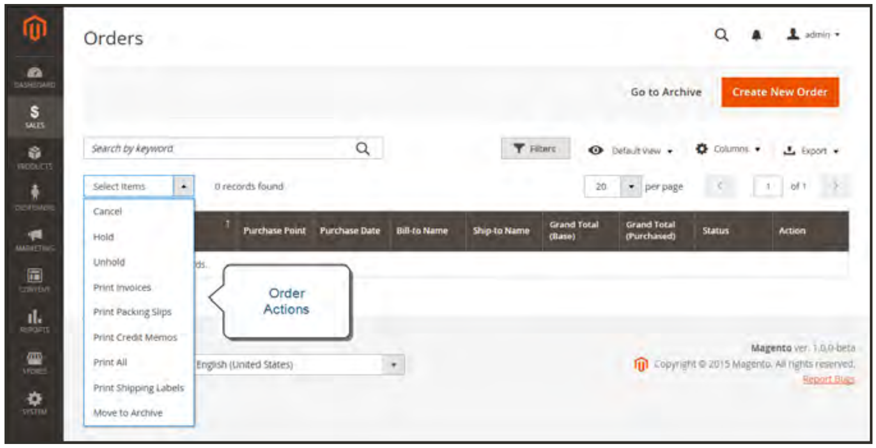
Purchase Date	The date the order was placed.
Bill-to Name	The name of the person who is responsible to pay for the order.
Ship-to Name	The name of the person to whom the order is to be shipped.
Grand Total (Base)	The grand total of the order.
Grand Total (Purchased)	The grand total of products purchased in the order.
Status	The current order status. Options:
Action	The View link opens the order.

Order Actions

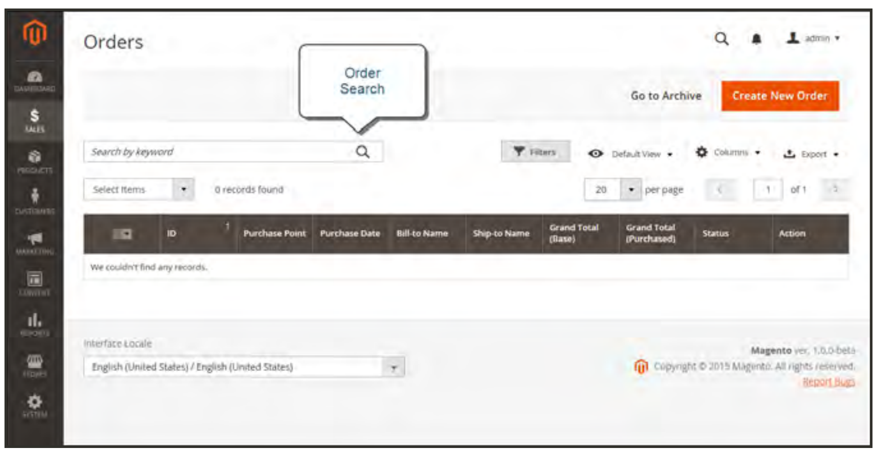
To apply an action to specific orders, mark the checkbox in the first column of each order. To select or deselect all orders, use the control at the top of the column.



Order Actions

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 that appear in the grid..



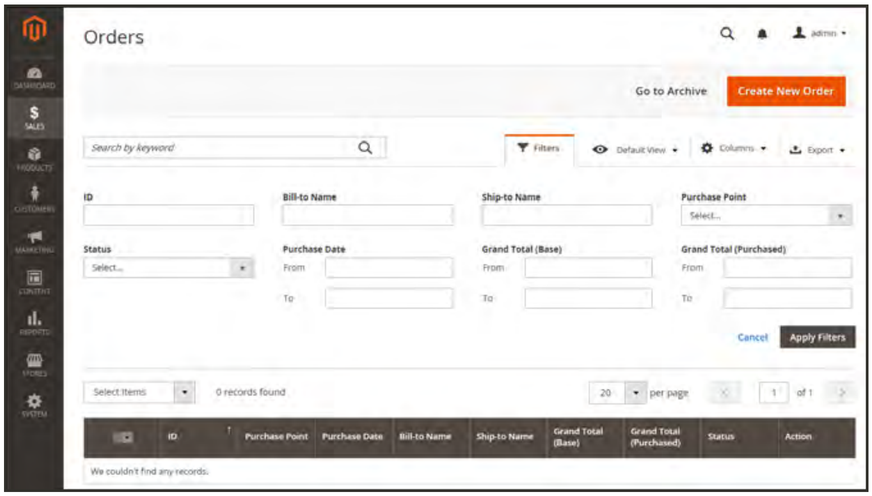
Search Results

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: Canceled Closed Complete Suspected Fraud On Hold

Search Filters (cont.)

FILTER	DESCRIPTION
	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

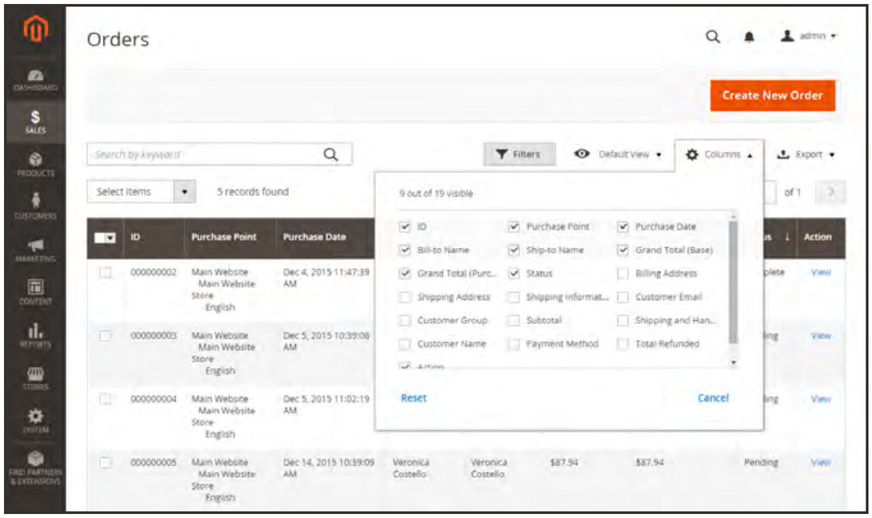
The selection of columns and their order in the grid can be changed according to your preference. The new layout can be saved as a grid "view." By default, only nine of twenty available columns are included in the grid.

To change the selection of columns:

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.



Order Grid 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.

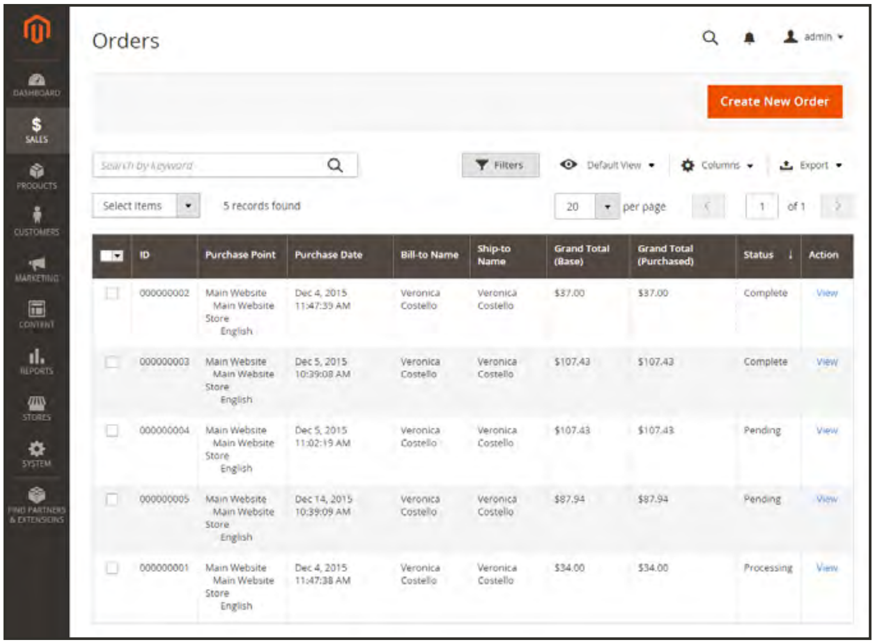
3. **Receive Payment.** The status of the order changes to “Processing.” when payment is received or authorized. Depending on the payment method, you might receive notification when the transaction is authorized or processed.

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

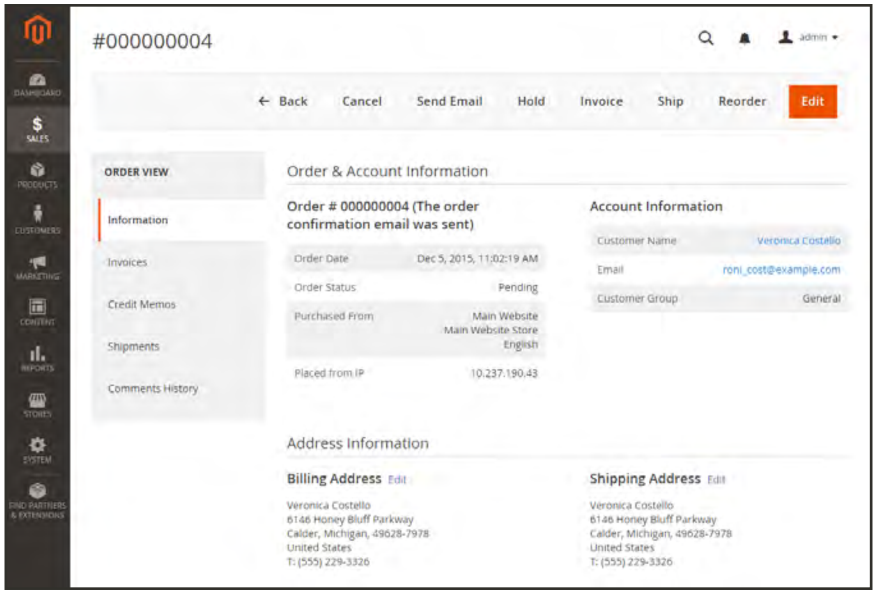
When a customer places an order, a sales order is created as a temporary record of the transaction. The sales order has a status of "Pending" until payment is received. Sales orders can be canceled until an invoice is generated. An easy way to think of it is this: Orders become invoices, and invoices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



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.



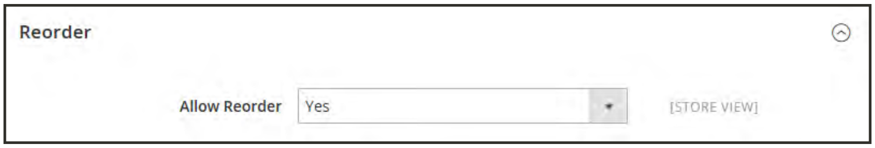
View Order

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.

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.

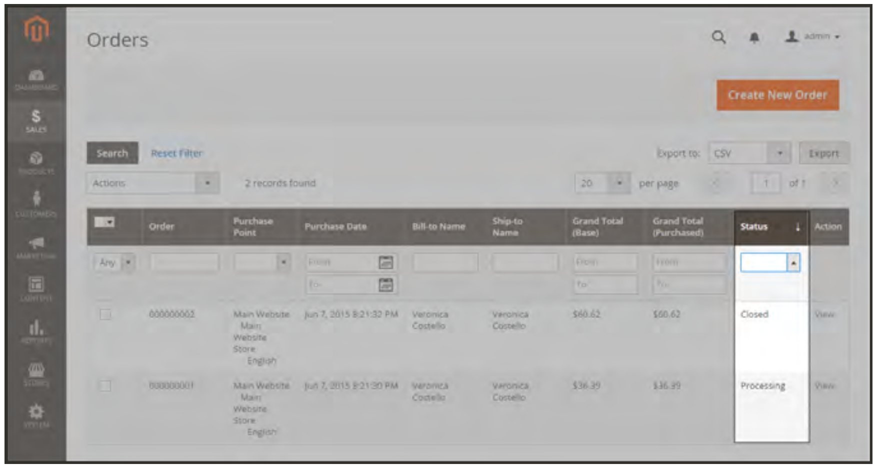


Reorder

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

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.

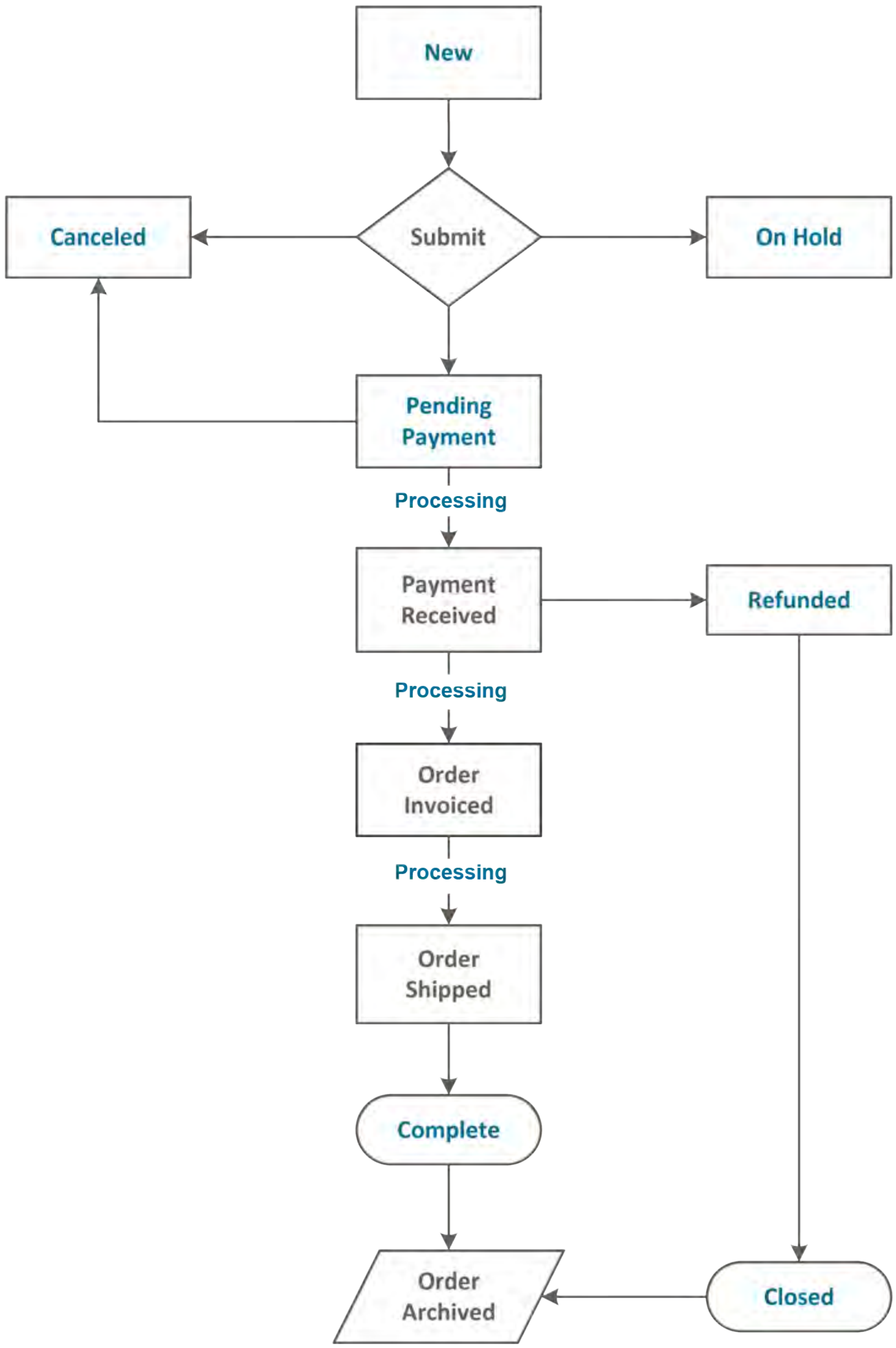


Order Status

Predefined Order Status

ORDER STATUS	ORDER STATE
Processing	New
Suspected Fraud	Pending Payment
Pending Payment	Processing
Payment Review	Complete
Suspected Fraud	Closed
Pending	Canceled
On Hold	On Hold
Complete	Payment Review
Closed	
Canceled	
PayPal Canceled Reversal	
Pending PayPal	
PayPal Reversed	

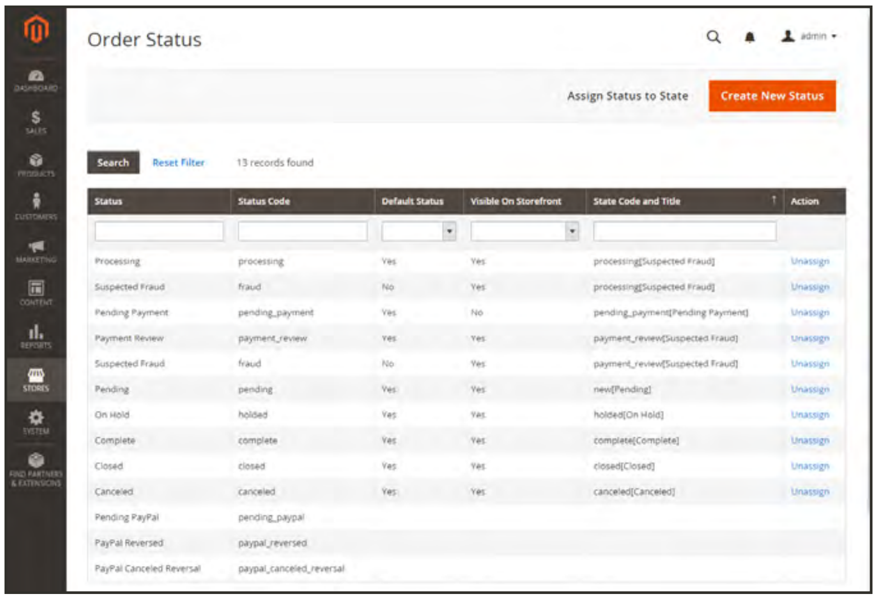
Order Status Workflow



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.

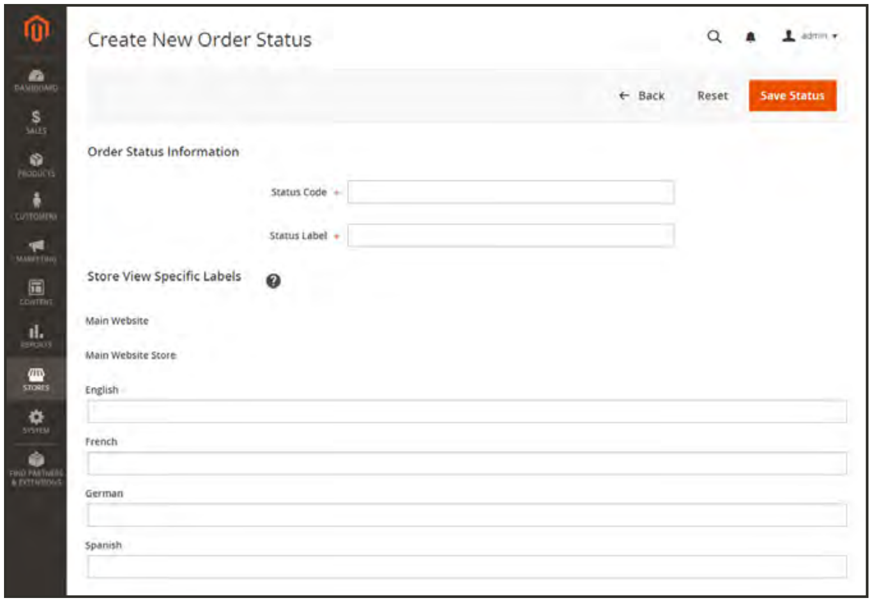
> Only default custom order status values are used in the order workflow. Custom status values that are not set as default can be used only in the comments section of the order.



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**.

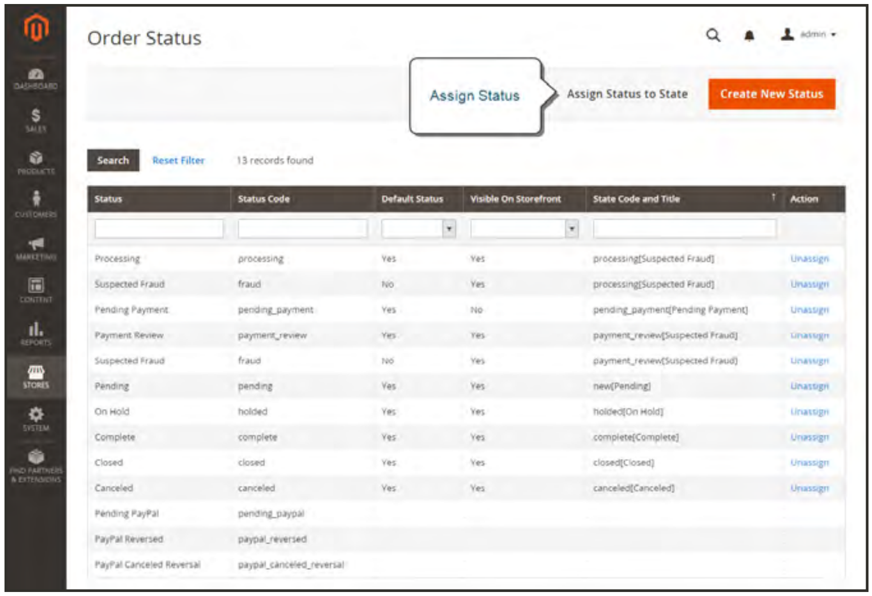


Create New Order Status

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

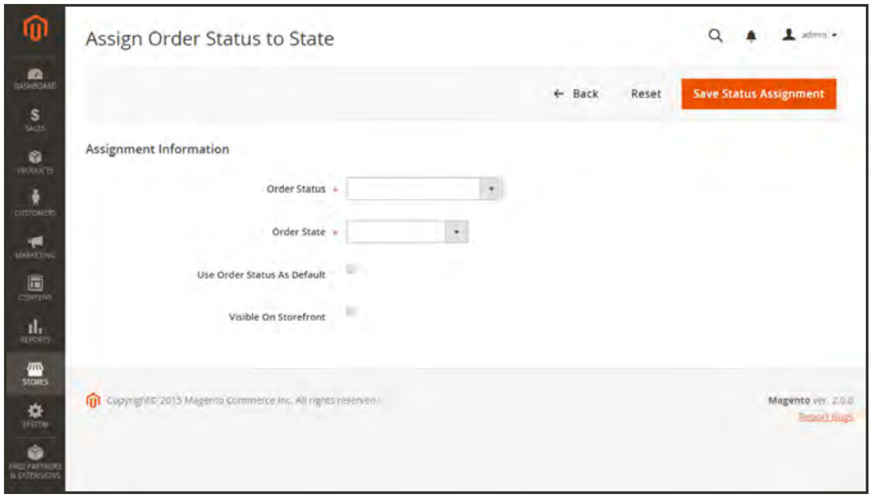
2. In the Assignment Information section, do the following:

    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.

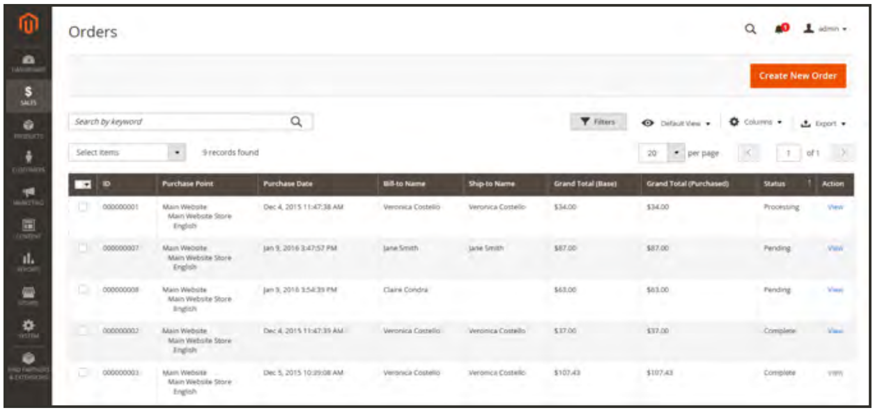
1. In the Order Status grid, find the order status record to be unassigned.
2. In the Action column on the far right of the row, tap the **Unassign** link.

   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.

Scheduled Order Operations

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

- Pending Payment Order Lifetime
- Scheduled Grid Updates



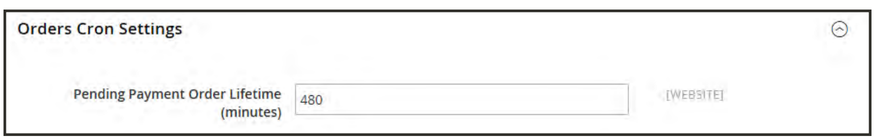
Orders Grid with Pending Orders

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:

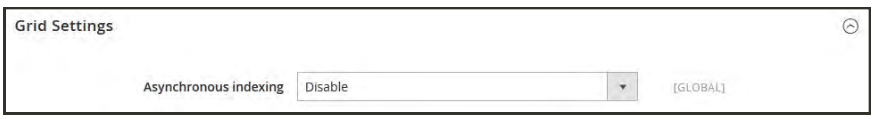
- Orders
- Invoices
- Shipments

- 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.”



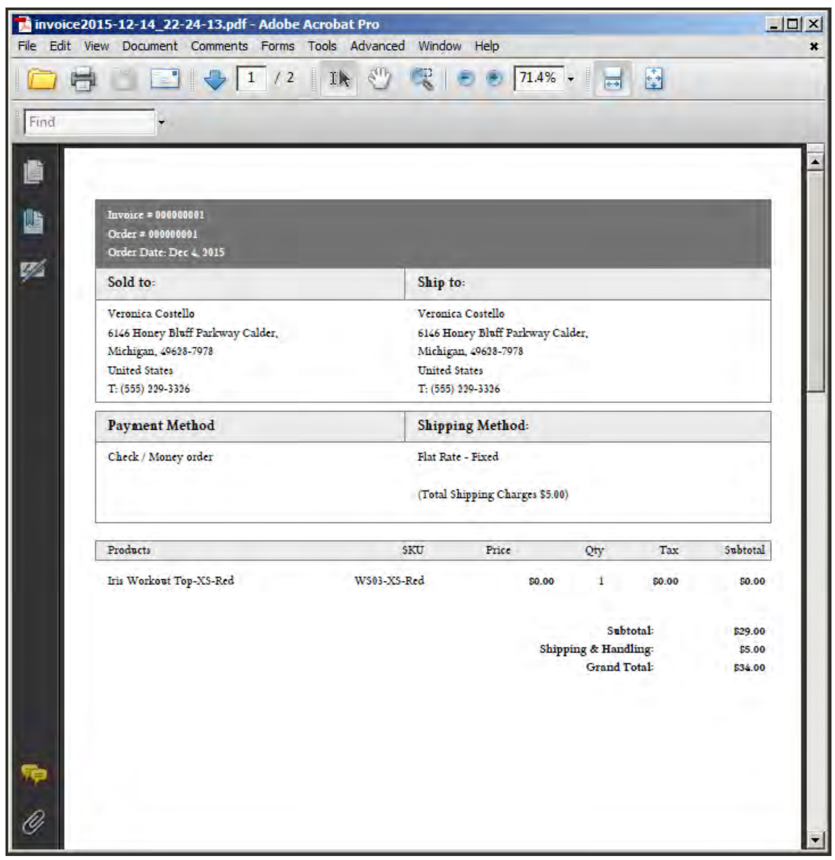
Grid Settings

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

CHAPTER 44:

Invoices

An invoice is a record of the record of 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. To customize the invoice template with your logo, see: Preparing Your Invoice Logo.



PDF Invoice

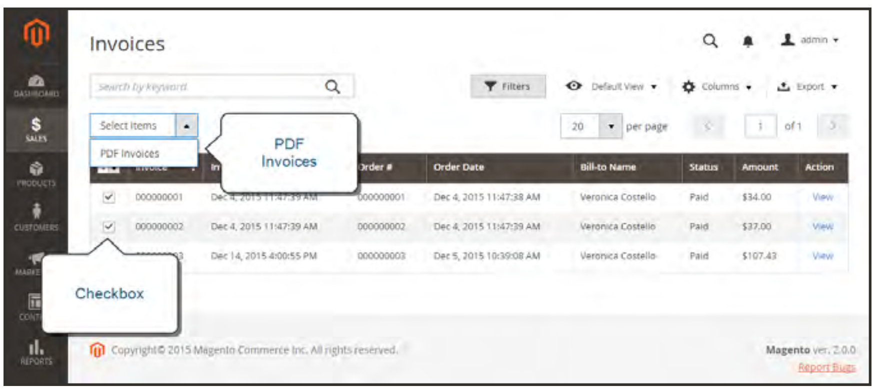
Printing Multiple Invoices

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

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

To print multiple invoices:

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



Print Invoices

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

CHAPTER 45:

Billing Agreements

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

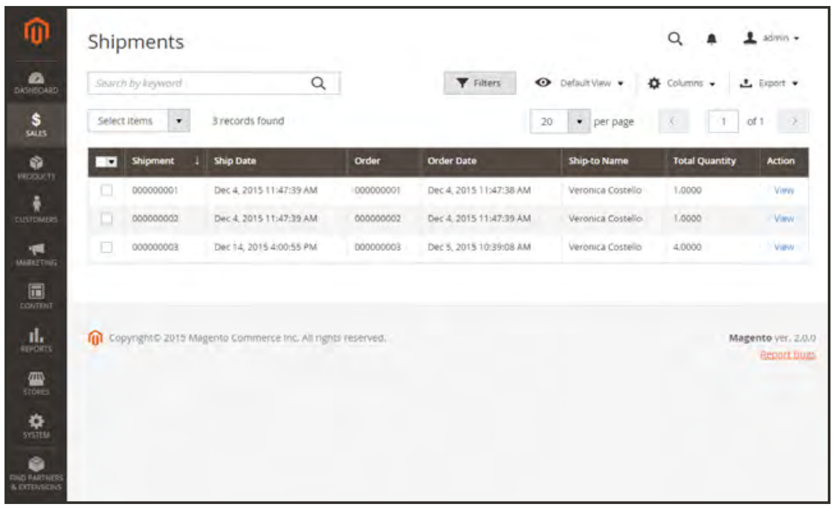
Billing Agreements

Notes

CHAPTER 46:

Shipments

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



Shipments

Notes

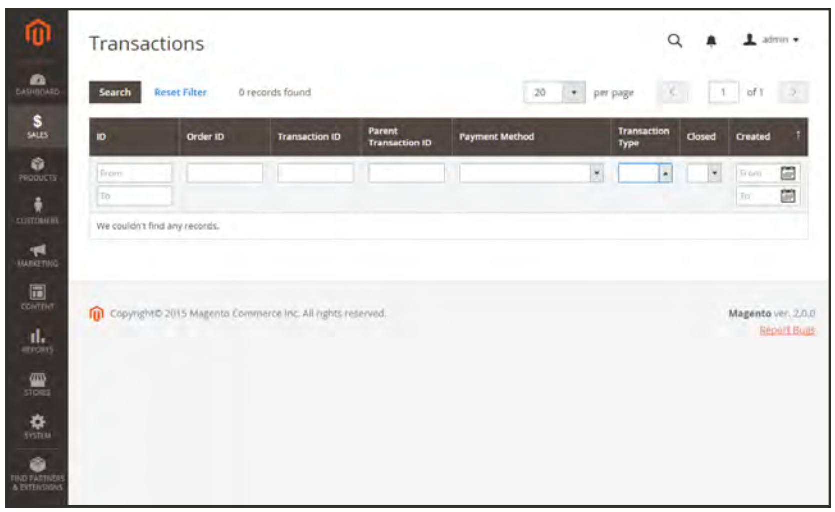
CHAPTER 47:

Transactions

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

To view transactions:

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



Transactions

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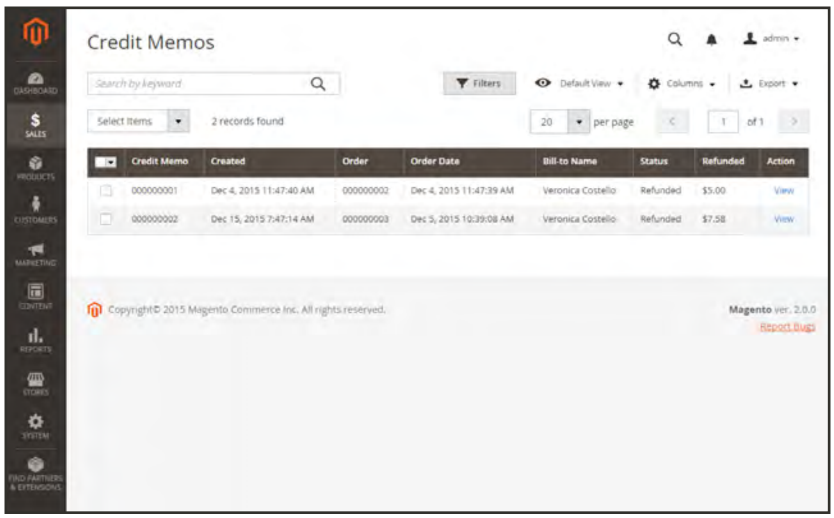
Credit Memos

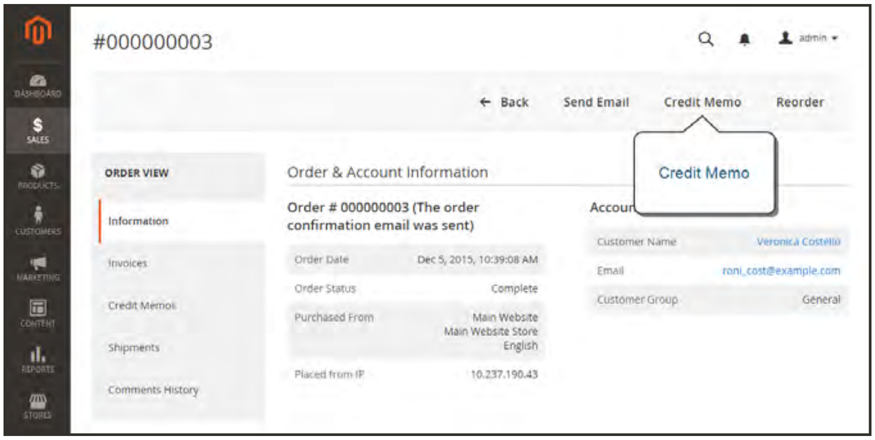
A credit memo is a document that shows the amount that is owed to the customer. The amount can be applied toward a purchase, or refunded to the customer. You can print a credit memo for a single order, or for multiple orders as a batch. Before a credit memo can be printed, it must first be generated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



Credit Memos

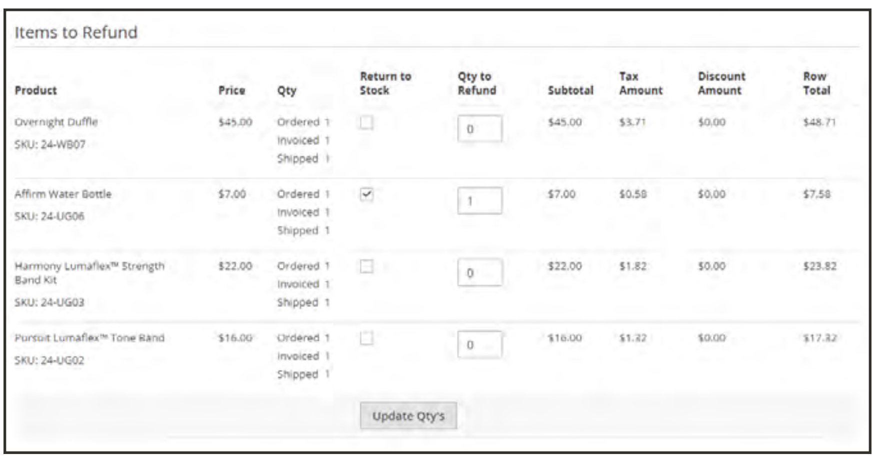
To create a credit memo:

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



Create Credit Memo

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



Items to Refund

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

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

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

5. Complete the following:

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

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

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

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

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

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

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

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

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

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

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

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

7. To complete the process and generate the credit memo, choose one of the following refund option buttons, according to the payment type:

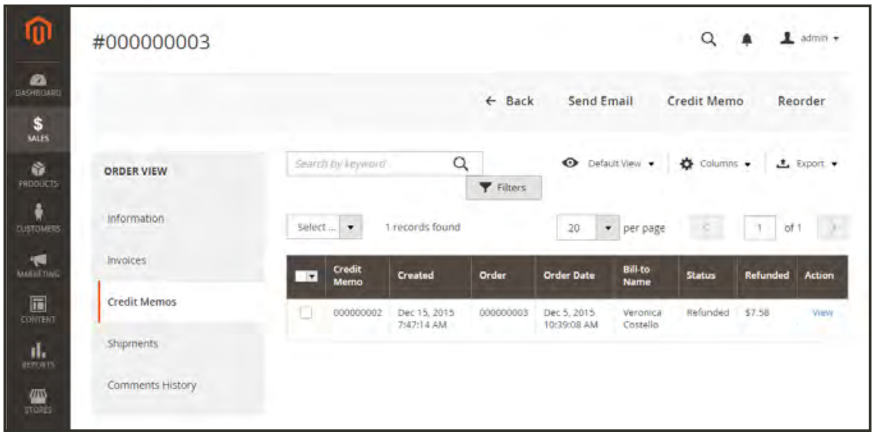
   - Refund Offline
   - Refund Online

8. To add a comment to the completed credit memo, scroll down to the Comments History section, and enter the comment in the box. A history of all activity related to the order is listed below.

- To send the comment to the customer by email, mark the **Notify Customer by Email** checkbox.
- To post the comment in the customer's account, mark the **Visible on Frontend** checkbox.

Then, tap **Submit Comment** .

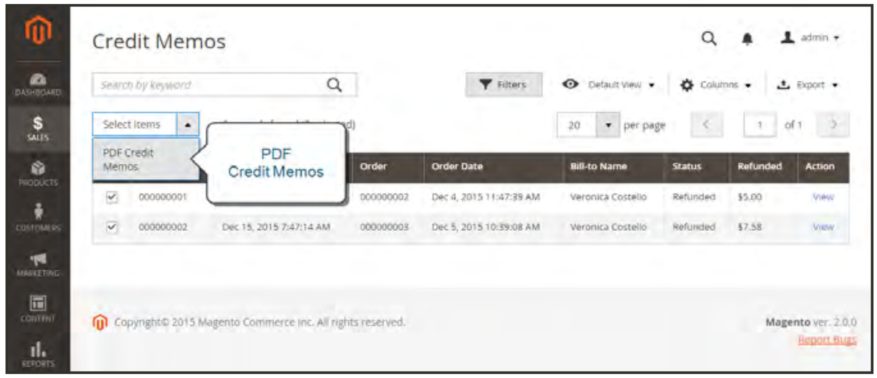
9. In the panel on the left, choose **Credit Memos**. Any credit memos that are associated with this order appear in the list.



Completed Credit Memo

Printing Credit Memos

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



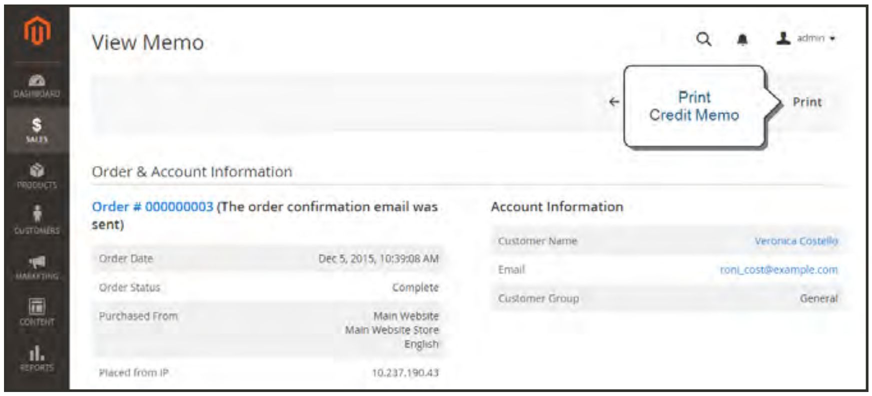
Credit Memos

To print a credit memo:

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

Method 1: Print current credit memo

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

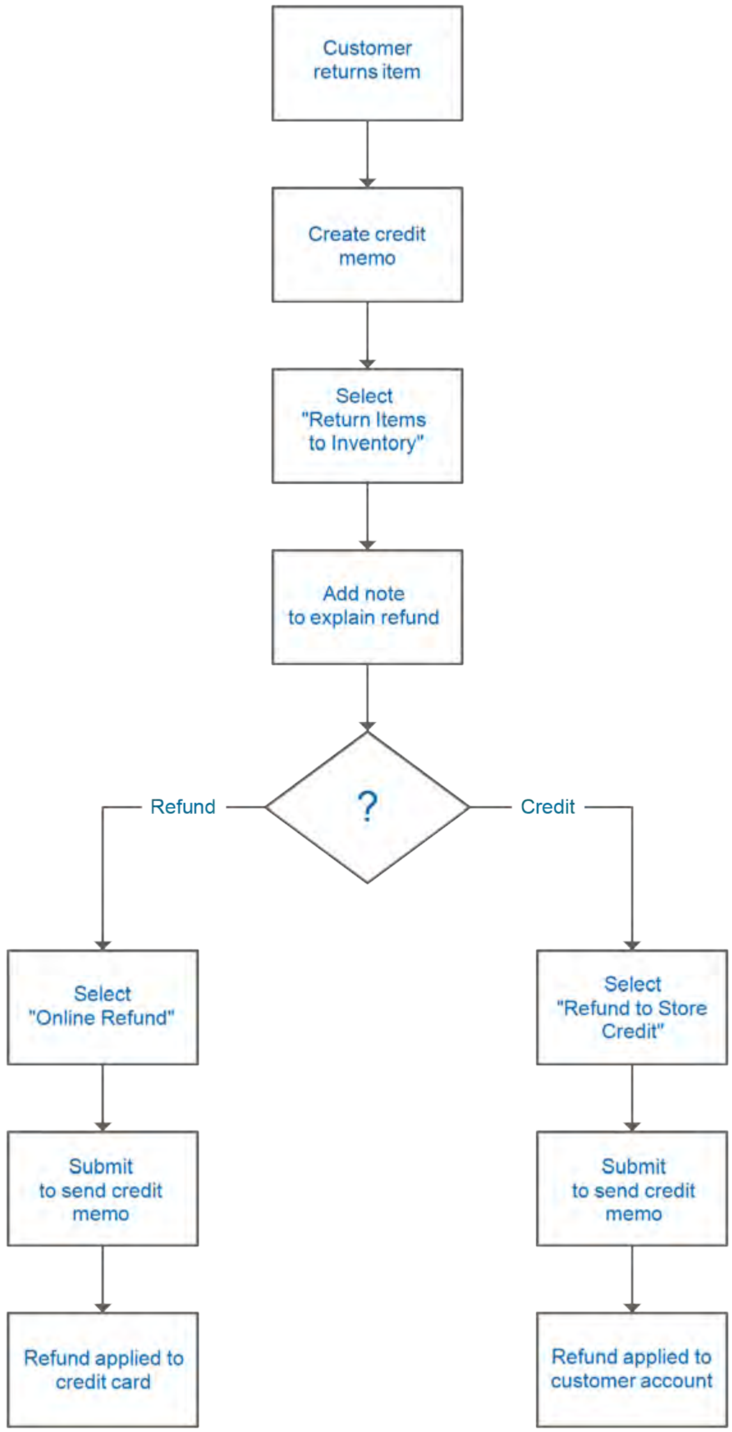


Print Credit Memo

Method 2: Print multiple credit memos

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

Product Return Workflow



Product Return Workflow

Notes