



Managing Orders In Your E-Commerce Store

Version 1.0

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1 Introduction

This document describes how to manage orders and customer details within your e-commerce store.

1.1 Conventions

Throughout this document <domain> is used to refer to your domain e.g. snowdoniait.com.

2 Logging on

Visit <http://www.<domain>/admin/>. You will be prompted to enter your email address and password. If you do not know your password please contact your system administrator or Snowdonia IT Services. Note that Snowdonia IT Services will not be able to reset a password without a request from an authorised representative.

Once you have successfully logged on you will be presented with a screen such as that shown in Figure 1.



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Figure 1: Your welcome screen

3 When you have orders

When your site was set up a variety of order statuses were configured depending on your requirements and chosen payment method. A summary of the number of orders having each status is shown in the “Orders” section found in the left hand column of the welcome screen. Some ideas on the use of each status are given below, however you may use the status for whatever suits you best.

Pending may be used when payments are being processed by cheque or and you are awaiting payment. Depending on your payment method this may have other meanings.

Processing may be used when a payment is being processed but has not yet been authorised. Depending on your payment method this may not be used.

Delivered will usually be used when a product has been shipped to the customer and the order has been completed.

Other statuses you see listed are not included by default, and will be discussed in section 9.

3.1 Order emails

An order confirmation email is sent to a customer when they place an order. If requested a copy of this will be sent to an email address specified by you.

4 Viewing orders

To view orders click on the “Orders” link under “Customers” on the welcome screen. You will be taken to a screen similar to that shown in Figure 2.



Figure 2 Viewing orders

You may select the status of the orders which you wish to display by using the “Status” dropdown menu. You may also go directly to a specific order by

entering the “Order ID” above the “Status”. Note that the Order ID can be found in the order email.

To view the details of a specific order, click on the order twice. The first time you click on an order you will be presented with various options relating to the order, and the second time you will be shown full details of the order.

5 Editing orders

To change an order status you need to edit the order. Click on the order once, followed by the edit button. An edit screen similar to that shown in Figure 3 will be displayed. Note that this is the same screen as we used to see details of the order in section 4.

- Administrator
- Configuration
- Catalog
- Modules
- Customers
- Customers
- Orders
- Locations / Taxes
- Localization
- Reports
- Tools
- Nochex APC

Orders back

Customer: Andy Harbach
17 Lon y Bedw
Bangor, LL574TN
United Kingdom

Telephone Number: 01248 355985

E-Mail Address: andy@walk-snowdonia.co.uk

Shipping Address: Andy Harbach
17 Lon y Bedw
Bangor, LL574TN
United Kingdom

Billing Address: Andy Harbach
17 Lon y Bedw
Bangor, LL574TN
United Kingdom

Payment Method: Check/Money Order

Products	Model	Tax	Price (ex)	Price (inc)	Total (ex)	Total (inc)
1 x Nirvana - Nevermind	cd5	17.50%	£10.21	£12.00	£10.21	£12.00
1 x Solid link bracelet	br1	17.50%	£28.09	£33.00	£28.09	£33.00
<small>Sub-Total: £48.00</small>						
<small>First Class (Royal Mail first class post): £3.00</small>						
<small>EU VAT rate at 17.5%: £8.70</small>						
<small>Total: £48.00</small>						

Date Added	Customer Notified	Status	Comments
14/04/2005 14:52:16	✔	Pending	Please include a gift tag to P

Comments

Status: Pending update

Notify Customer: Append Comments:

invoice
packing slip
back

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Figure 3 Editing an order

When an order is shipped, or payment is received etc you may want to change the status of the order. Simply select the new status in the “Status” dropdown menu. If you want to add any comments, insert them in the “Comments” box. If you wish to notify the customer of the update to their order by email, ensure that the “Notify customer” box is ticked.

Once an update is made to an order it will be listed in the table above the “Comments” box.

6 Printing an invoice

To print an invoice for a customer, simply select the order and click on the “Invoice” button. You may now print the displayed invoice from your web browser.

7 Printing a packing slip

To print a packing slip to include with a shipment, select the order and click on the “Packing slip” button. You may now print the displayed packing slip from your web browser.

8 Deleting an order

To delete an order from the system, select the order and click the “delete” button. You will be prompted to confirm whether you want to delete the order, and whether you would like to re-stock your store with any products which were included in the deleted order.

9 Payment method specific features

9.1 NoChex APC

The purpose of the NoChex APC is to inform you when a payment has been authorised. When a customer processes a transaction with NoChex the order status is set to “Nochex Processing”. When NoChex confirm that the payment has been authorised the status is set to “Nochex authorised”. Details of the response from NoChex, including the authorisation code, will now be included in the “Transactions” list under “NoChex APC”.

10 Viewing orders by customer

To view customer details, click on “Customers” under the “Customers” menu. You will be shown a list of all customers who have registered with your store. You may search for a specific customer by name using the “Search” box at the top of the screen. Once you have selected a customer you may click on the “Orders” button to see all orders which have been placed by the customer. This will display orders as seen in section 4.

You may use the “Email” button to send an email to a specific customer, and you may use the “Edit” and “Delete” buttons to change or remove details of a customer respectively.

11 About Snowdonia IT Services

At Snowdonia IT Services we provide a complete and high quality range of IT Services, all at a reasonable price.

We offer on-site services to businesses and home users.

- Website design package with managed hosting and domain name registration options.
- E-commerce website development.
- PC support including system and software installation / troubleshooting and software tuition.
- Linux solutions including server installation and configuration, and desktop systems.
- Information security services including virus protection / recovery, vulnerability scanning. and security programme development.
- Home and business network configuration and troubleshooting.
- Monitoring systems including alerting and availability statistics.
- Data recovery services from a variety of media.

11.1 Contact details

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