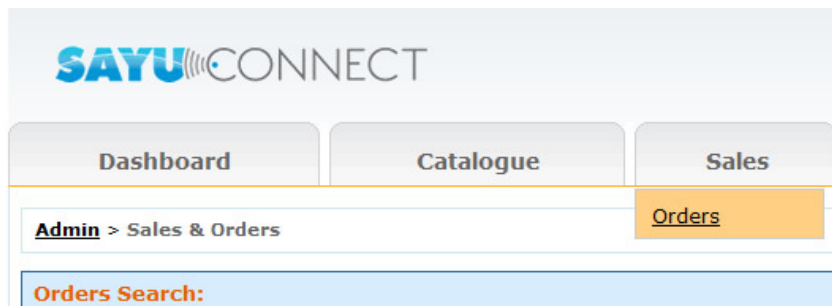


# Sales/Order Management

The sales orders taken via the website can be viewed/managed by going to the Sales → Orders section



Orders can be searched in 2 ways.

**One:** By using the Search feature available:

**Orders Search:**

Order No	<input type="text"/>	Name/E-Mail	<input type="text"/>
Keyword	<input type="text"/>	Delivery Country	<input type="text"/>
From Date	<input type="text"/>	To Date	<input type="text"/>
Order Status	<div><input type="checkbox"/> PAID <input type="checkbox"/> SHIPPED <input type="checkbox"/> ORDER COMPLETE <input type="checkbox"/> PAID BY PAYPAL <input type="checkbox"/> FAILED <input type="checkbox"/> CANCELLED <input type="checkbox"/> REFUNDED <input type="checkbox"/> AWAITING FRAUD</div>		
CC Type	<input type="text"/>	Order Type	<input type="text"/>
<a href="#">CLEAR</a>		<input type="button" value="Search"/>	

Orders can be searched by order number, name, email, keyword, etc.  
A *javascript* calendar feature is also available which helps you to search orders by date.

**Two:** By using the Order Stats grid

Stats:					
Status	Today	Yesterday	Last 7 days	This Month	Last Month
PAID	1	0	1	1	0
SHIPPED	0	0	0	0	0
ORDER COMPLETE	0	0	0	0	0
PAID BY PAYPAL	0	0	0	2	0
FAILED	0	0	0	0	0
CANCELLED	0	0	0	0	0
REFUNDED	0	0	0	0	0
AWAITING FRAUD	0	0	0	0	0
Total:	1	0	1	3	0

The Order Stats Grid shows orders over a predefined time period (daily, weekly and monthly up to previous month) and lists them based on their order statuses.

**Order Status** – This represents the current status of an order. A status is initially assigned to an order by the payment system. The most common statuses for an order are **PAID/PAID BY PAYPAL, PENDING, FAILED, NEW ORDER IN PROGRESS**.

**PAID/PAID BY PAYPAL** – This status is set when the payment is successfully authorized by the payment system

**FAILED** – This status is set when a transaction fails due to invalid card details or any other reason.

**PENDING** – This status is used on pending orders, usually when additional checks are required to authorise the transaction.







**NEW ORDER IN PROGRESS** – This can also be referred to as Abandoned Baskets. If an order is set to this status, then it means that the user hasn't successfully completed the checkout process

Apart from these, there are other statuses available which can be used to determine the order status at various steps.

**For Example:** If the order is dispatched, it can be set to "GOODS SHIPPED" status  
If a customer cancels an order, then the status "CANCELLED" can be used







The SAYU E-Commerce platform allows the ADMIN to use from a set of already created statuses OR the ADMIN can create his own order status by going to Sales→Order Statuses Section.

## Order Maintenance Section

ORDERS									
Common Actions <a href="#">EXPORT SELECTED</a>   <a href="#">EXPORT NEW ORDERS (3)</a>   <a href="#">DOWNLOAD PDF INVOICES</a>   <a href="#">DOWNLOAD PDF PACKING SLIPS</a>									
<input type="checkbox"/>	Order No ▼	Customer Name	Order Status	Payment Method	Order Placed	Order Total	Delivery To	Invoice	
<input type="checkbox"/>	36	Simon Pitts	Paid	PayPal (Express Checkout Mobile)	8 Aug 2011, 8:54 PM	£9.55	GB	 	<a href="#">VIEW/EDIT</a>
<input type="checkbox"/>	26	Ravi Adloori	Paid By Paypal	PayPal (Express Checkout Mobile)	1 Aug 2011, 4:00 PM	£0.01	GB	 	<a href="#">VIEW/EDIT</a>
<input type="checkbox"/>	27	Ravi Adloori	Paid By Paypal	PayPal (Express Checkout Mobile)	1 Aug 2011, 4:04 PM	£0.01	GB	 	<a href="#">VIEW/EDIT</a>
► Actions									

The order maintenance section displays all the recent orders, abandoned baskets or failed transactions. Moving you mouse over to the 'Order Total' column brings up a pop-up window which shows you more details of that order.

An invoice for a particular order can be generated in PDF or HTML format by clicking on the respective links beside the order

Delivery To	Invoice	
GB	 	<a href="#">VIEW/EDIT</a>
GB	 	<a href="#">VIEW/EDIT</a>
GB	 	<a href="#">VIEW/EDIT</a>

## Actions (& Common Actions)

The 'Actions' and 'Common Actions' section allows ADMIN users to perform additional actions on orders like Export, Import, Update Status, Delete, etc.

**Export Orders** – You can use the checkbox available on the Order Maintenance block to choose all or particular orders and export them into a spread-sheet or CSV file.

**ORDERS**

Common Actions **EXPORT SELECTED** **EXPORT NEW ORDERS (7)** | [DOWNLOAD PDF INVOICES](#) | [DOWNLOAD PDF PACKING SLIPS](#)

<input type="checkbox"/>	Order No ▼	Customer Name	Order Status	Payment Method	Order Placed	Order Total	Delivery To	Invoice	
<input type="checkbox"/>	45		Paid By Paypal	PayPal (Express Checkout Mobile)	18 Aug 2011, 8:13 PM	£160.71	GB		<a href="#">VIEW/EDIT</a>
<input type="checkbox"/>	44		Paid By Paypal	PayPal (Express Checkout Mobile)	18 Aug 2011, 4:28 PM	£25.73	GB		<a href="#">VIEW/EDIT</a>
<input type="checkbox"/>	42	ravi A	Paid By Paypal	PayPal (Express Checkout Mobile)	15 Aug 2011, 4:11 PM	£0.01	GB		<a href="#">VIEW/EDIT</a>
<input type="checkbox"/>	40	ravi A	Paid By Paypal	PayPal (Express Checkout Mobile)	15 Aug 2011, 3:58 PM	£0.01	GB		<a href="#">VIEW/EDIT</a>
<input type="checkbox"/>	36	Simon Pitts	Cancelled	PayPal (Express Checkout Mobile)	8 Aug 2011, 8:54 PM	£9.55	GB		<a href="#">VIEW/EDIT</a>
<input type="checkbox"/>	27	Ravi Adloori	Paid By Paypal	PayPal (Express Checkout Mobile)	1 Aug 2011, 4:04 PM	£0.01	GB		<a href="#">VIEW/EDIT</a>
<input type="checkbox"/>	26	Ravi Adloori	Paid By Paypal	PayPal (Express Checkout Mobile)	1 Aug 2011, 4:00 PM	£0.01	GB		<a href="#">VIEW/EDIT</a>

▼ Actions

**EXPORT SELECTED** **EXPORT SELECTED (7)** **EXPORT NEW ORDERS (7)** | [IMPORT](#) | [DELETE SELECTED](#)

[DOWNLOAD PDF INVOICES](#) | [DOWNLOAD PDF PACKING SLIPS](#)

[Update Status](#)

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Clicking on the “Export Selected” or “Export Filtered” takes you to a page where you can choose the file format required and the fields from the orders required for the export.

Delimited by **Comma** **Export**

Please use only select fields you'd like to export

**Select/Unselect**

Order No	<input type="checkbox"/>	Parent Order No	<input type="checkbox"/>
Invoice Number	<input type="checkbox"/>	Transaction ID	<input type="checkbox"/>
Authorization Code	<input type="checkbox"/>	User ID	<input type="checkbox"/>
User Type ID	<input type="checkbox"/>	Affiliate User ID	<input type="checkbox"/>
Payment ID	<input type="checkbox"/>	Success Message	<input type="checkbox"/>

You can delimit the export on Comma, Tab or Semicolon. Similar options are available for the Products. You can delimit the products by Rows, Comma, Tab, Space, Semi Colon, and New Line

**Export New Orders** – This option can be used to export recently placed orders on the website

**PDF Invoices / PDF Packing Slips** – This option is used to generate packing slips or invoices for a set of orders. You need to choose the orders for which you need to generate PDF invoices or packing slips by using the check-box available against the orders.

▼Actions

[EXPORT SELECTED](#) | 
 [EXPORT SELECTED \(7\)](#) | 
 [EXPORT NEW ORDERS \(7\)](#) | 
 [IMPORT](#) | 
 [DELETE SELECTED](#)  
[DOWNLOAD PDF INVOICES](#) | [DOWNLOAD PDF PACKING SLIPS](#)

▼ [Update Status](#)

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SAYUConnect ADMIN ver 1.01

**Update Status** – You can update the status of an order or set of orders by using the “Update Status” button in the Orders Maintenance section. You will need to select order/orders by using the check-box available against the orders, choose the new status by using the drop-down menu and the click on the “Update Status” button.

▼Actions

[EXPORT SELECTED](#) | 
 [EXPORT SELECTED \(7\)](#) | 
 [EXPORT NEW ORDERS \(7\)](#)  
[DOWNLOAD PDF INVOICES](#) | [DOWNLOAD PDF PACKING SLIPS](#)







▼ [Update Status](#)

- New Order in Progress
- Shipped
- Order Complete
- Paid By Paypal
- Failed
- Cancelled
- Refunded

**Delete Selected** – Order can be deleted completely from the system by using the ‘Delete’ link. You will need to choose the order/orders that are needed to be removed by using the check-box and then click on the “Delete Selected” link.

**Please note** – Order once removed cannot be restored again into the system.

**Single Order Maintenance – View/Edit** – Order maintenance can also be done on a single order basis by using the View/Edit link available against each order

Order Placed	Order Total	Delivery To	Invoice	
18 Aug 2011, 8:13 PM	£160.71	GB	 	<a href="#">VIEW/EDIT</a>
18 Aug 2011, 4:28 PM	£25.73	GB	 	<a href="#">VIEW/EDIT</a>
15 Aug 2011, 4:11 PM	£0.01	GB	 	<a href="#">VIEW/EDIT</a>

## View/Edit Section:

[Admin](#) > [Sales & Orders](#) > Order 27

User who submitted this order also submitted 4 order(s).  
Total goods amount for these orders - £3.23

Status	Orders	Amount
Paid By Paypal	3	£0.03
Cancelled	1	£3.20
<b>Total</b>	<b>4</b>	<b>£3.23</b>

Order No: 271 Aug 2011, 4:04 PM

SHOPPING CART

Status: Paid By Paypal

4Packing Slip | ORDER NOTES (0) | DOWNLOAD LINKS (0) | SERIAL NUMBERS (0) | DELETE

Product	Price excl. TAX	Qty	Total incl. TAX
Test Sayu Status: Paid By Paypal	£0.01	1	£0.01
Goods Total			£0.01
VAT			£0.00
Total Order Cost			£0.01

Payment Gateway: PayPal (Express Checkout Mobile)  
Transaction Number: 7X564197LN513381X

6Shipping Tracking Number

Update

PERSONAL DETAILS

**Invoice to**  
Name: Ravi Adloori  
Email: [accounts@sayu.co.uk](mailto:accounts@sayu.co.uk)  
Street Address 1: Sayu Ltd, Scotswood House, Thornaby Place  
Street Address 2: Thornaby  
City: Stockton-on-Tees  
State:  
Zip/Postal Code: TS17 6SB  
Country: UK Mainland  
Daytime Phone:  
Evening Phone:  
[Edit](#)

**Delivery to**  
Name: Ravi Adloori  
Street Address 1: Sayu Ltd, Scotswood House, Thornaby Place  
Street Address 2: Thornaby  
City: Stockton-on-Tees  
State:  
Zip/Postal Code: TS17 6SB  
Country: UK Mainland  
[Edit](#)  
Remote Address: 213.131.107.146 [Add to Black List](#)

ORDER CHANGE LOG

1 Aug 2011, 4:04 PM	Change status	Paid (PayPal (Express Checkout Mobile))	
1 Aug 2011, 4:05 PM	Change status	Paid -> Order Complete	

1 – Shows previous order history for that customer

2 – Shows shopping basket details of the customer. Details include Products, Pricing, Quantity, Shipping Method and Costs, Tax Total and Total Order Cost.

3 – Shows the status of the order. (For successful transactions, this will be set to 'Paid' or 'Paid by Paypal'. For failed transactions, this will be set to Failed). This is the status of the complete order and can be updated by choosing any other status from the drop-down list and then clicking on the 'Update' button available below the 'Shipping Tracking Number' field (7)

4 – This section provides links to generate Packing slips for the order (both in PDF and HTML format), link to order notes (this is where the ADMIN can add extra notes on the order for internal reference) and link to delete the order.

Note: Orders deleted using the delete link cannot be recovered. So this option must be used with caution.

5 – This is the status available against individual products and can be used in part-shipment of the order. So if an order has more than one product, and the order is part-shipped, then you can update the status of the product that has shipped and leave the

un-shipped products on the default status. To change status on a product that has shipped, select a different status using the drop-down present below the Product Name and then click on the 'Update' button available below the 'Shipping Tracking Number' field(7).

6 – This block shows the Payment Gateway used and Transaction Number provided by the Payment Gateway on the left-hand side and 'Shipping Tracking Number' field and 'Update' button to the right.

The 'Shipping Tracking Number' field can be used to enter and save postal tracking number for the order. The 'Update' button performs an update on the whole order. Using the 'Update' button you can change the status of the order/individual products and assign shipping tracking number to the order

7 – The personal details block shows the Invoice and Delivery address details of the order.

Note: Clicking on the Email Address of the customer will take you to section where you can send a quick email about the order status.

8 – EDIT: Using these links, you can edit the Invoice/Delivery address details of the order.

9 – Order Change Log: This block lists all the changes made on the order, both by the system (when transaction is being processed) or by the ADMIN user for records.