



***HOW TO
Administer Order
Processing***

Revision 1.2



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MM1053-03

HOW TO

Administer Order Processing

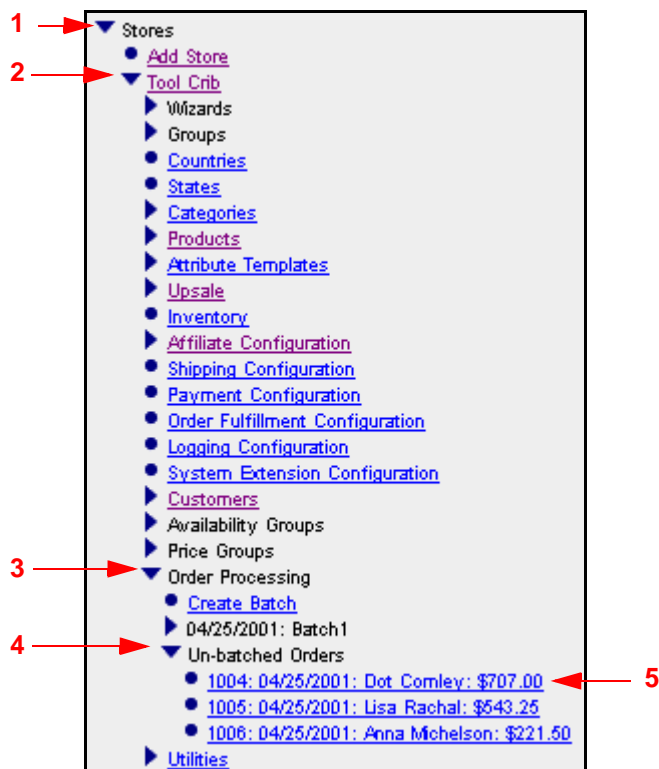
Introduction

Customer orders should be processed on a regular basis. You can create batches of orders and then download them for tracking and accounting purposes. How often you will create a batch of orders to be downloaded depends on the volume of your store. It could be weekly for a small, low-volume store, or it may be daily for a higher volume store. This decision should be made after careful consideration of your order volume and should be checked regularly.

Processing Orders

All orders go into the Un-batched Orders list. Use the following procedure to create a batch of orders.

1. Click the triangle next to Stores.
2. Click the triangle next to your store name.
3. Click the triangle next to Order Processing.
4. Click the triangle next to Un-batched Orders list that appears.
5. Select an order to view or edit information.



The Edit Order form has the following links:

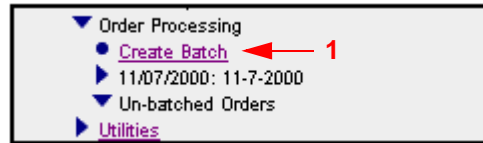
1. Customer Information
View the customer information and verify that the data entered is valid. You may edit the information if needed.
2. Order Information
View what products or services the customer has ordered. You can also verify that the tax, shipping information and the total are correct.
3. Payment Information
View the credit card or check information. Click the payment type link to display the payment information.
4. Printable
Click the Printable button to view the order in a layout designed for printing.
5. Edit Customer
Click the Edit Customer button to view the Edit Customer form.

The screenshot shows the 'Edit Order: #1005' form. At the top, there are three tabs: 'Customer Information' (highlighted with a red arrow 1), 'Order Information' (with a red arrow 2), and 'Check Payment' (with a red arrow 3). Below the tabs is a dark blue header with 'Ship To:' and 'Bill To:' labels. To the right of this header are two icons: a printer icon (with a red arrow 4) and a document icon (with a red arrow 5). The form contains two columns of input fields for 'Ship To' and 'Bill To' information, with the following data:

Field	Ship To	Bill To
First Name:	Lisa	Lisa
Last Name:	Rachal	Rachal
Email Address:	elise@miva.com	elise@miva.com
Phone Number:	858-731-4200	858-731-4200
Fax Number:		
Company:		
Address:	5060 Sante Fe Street	5060 Sante Fe Street
City:	San Diego	San Diego
State:	CA	CA
Zip/Postal Code:	92109	92109
Country:	US	US

Create Batch

Use the following procedure to make a batch of orders from the Un-batched list.



1. Select the Create Batch link.

 A screenshot of a web form titled 'Create Batch: 8 new orders'. Below the title is a text input field labeled 'Batch Name:'. A red arrow points to the input field with the number 2 below it.

2. Enter the name of the batch in the Batch Name field.
Once you have named your new batch you will be able to run a report on the batch of orders and begin processing them.

 A screenshot of a web form titled 'Run Batch Report: 11-7-2000'. It features a 'Report:' dropdown menu with 'Standard Batch Report' selected. A red arrow points to the dropdown with the number 3. Below the dropdown, the text 'Batch '11-7-2000' created' is followed by a red arrow pointing to a 'Run Report' button, with the number 4 below it. A 'Reset' button is also visible.

3. Click the drop-down list and select Standard Batch Report.
4. Click Run Report.

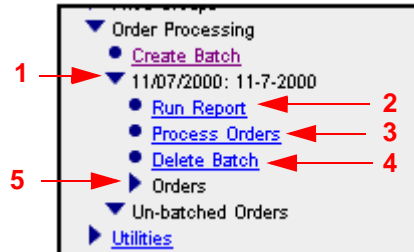
The Standard Batch Report shows the order information. Each order has similar information, as shown in Order #1007 below.

Standard Batch Report			
Order #1007			
Ship To:		Bill To:	
Name:	George Zenith	Name:	George Zenith
Email Address:	walter@miva.com	Email Address:	walter@miva.com
Phone Number:	490-2570	Phone Number:	490-2570
Fax Number:		Fax Number:	
Company:		Company:	
Address:	2629 Ariane Dr San Diego, CA 92117 US	Address:	2629 Ariane Dr San Diego, CA 92117 US
Shipping Information:		Payment Information:	
Shipping Method: Base Charge		CyberCash	
Code	Product	Quantity	Price/Ea. Total
LI	Limoges Inkwell	1	\$225.00 \$225.00
CGI	Cut Glass Inkwell	1	\$45.00 \$45.00
WP	Wood Pens	1	\$60.00 \$60.00
KBLO	Koala Bear Letter Opener (Special Offer) Color: Dark Brown	1	\$0.00 \$0.00
			<i>Shipping: Base Charge:</i> \$3.00
			<i>Sales Tax:</i> \$0.00
			Total: \$333.00
Order #1023			
Ship To:		Bill To:	
Name:	Walter Squib	Name:	Walter Squib
Email Address:	walter@miva.com	Email Address:	walter@miva.com

When you create the new batch of orders, those orders are cleared out of the Un-batched Orders list. The new batch name is displayed below the Create Batch link.

After the Batch has been created you can perform certain tasks.

1. Click the triangle next to the batch name.
2. Select the Run Report link to create a Batch Report. Then:
 - Select Standard Batch Report.
 - Click the Run Report button.



3. Select Process Orders and a form similar to the one below displays information about an order.

Process Orders: 09/19/2000: 9/19/2000

Order #1000

COD

Next to each of the order listings are Process and Mark as Processed buttons. Depending on which payment module(s) your store is using, the system will do different things with the information in each order that it processes for you. If your store does not use any of the third-party payment processing services but you do use one or both of the Credit Card Payment With Simple Validation or Check Payment modules, there is no difference between what happens by clicking either button. The system is only making a mark on the order and not actually billing a credit card account.

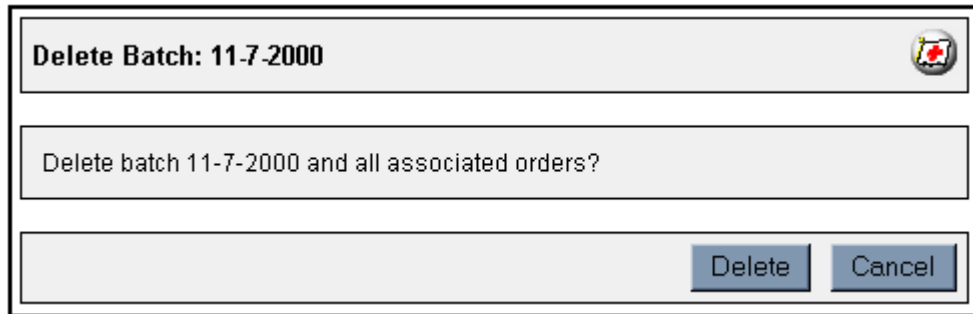
The payment processing modules that interface with remote processing servers do credit card validation at the point of entry at the time the order is placed (`merchant.mv`).

Payment processing does not actually bill the credit card until the order is processed in the stores administration interface (`admin.mv`). After processing (or marking as processed) a given order in a batch, the order disappears from the Un-batched Orders list. The "Process" and "Mark as Processed" buttons will not appear on the form once the order has been made part of the batch.

The only case where clicking the Process button results in any transfer of funds is when the CyberSource Payment Services or CyberCash module is in use.

Caution: Before deleting your batched orders, you may want to archive the orders you want to retain. Refer to *HOW TO Export Data to an Outside File*. You can also print your orders for a hard copy.

4. Click Delete Batch to remove the batch with all of its orders completely from the system. You can also view or edit orders in the batch by clicking on any order listing in the Orders section of the batch menu.



The screenshot shows a dialog box titled "Delete Batch: 11-7-2000" with a warning icon in the top right corner. The main text of the dialog asks, "Delete batch 11-7-2000 and all associated orders?". At the bottom right, there are two buttons: "Delete" and "Cancel".

5. Click the triangle next to Orders to display a list of the orders in the batch. You can click the link for any order and review the order data and change it if necessary.