

Etail Systems Tip Sheet

Objective: To process an order in COMS, including despatching, cancelling & returning items.

The following tells you how to achieve this;-

When you log in to COMS, this screen will automatically appear.

Welcome Kim Ross

Orders Products Members Sites Site Admin New Site Admin Reports Home Partner Sign out

You are here Client: Etail Demo

Toggle COMS Information and Help

Goto

MOTO Order No: Goto Order Product Ref: Goto Product Surname: Goto Orders Goto Repeat Orders Goto Member

Last 10 recent Orders

View New Orders

Order No.	Order date	Site	Source	Name	Deadline
No new Orders					

Last 10 Forms Submitted

View New Forms

Title	Site	Date / Time
Test	Etail Demo	06/10/2011 23:48

Last 10 Customer enquiries

View New Enquiries

Site	Subject	Name
No new Customer Enquiries		

Your 10 most recent orders will appear here. To view the orders, click the 'View New Orders' button, or the 'Orders' tab in the top menu.

You'll be able to access all your new orders from this screen.

Welcome Kim Ross

Orders Products Members Sites Site Admin New Site Admin Reports Home Partner Sign out

New Orders MOTO Drop Ship Repeat Orders Import Delivery Picking Search Orders Enquiries Forms Admin

You are here Client: Etail Demo Orders New Orders

Order No... From Date... Surname... Email Address... Search

Postcode... To Date... Client Ref / Sku... Marketplace Order No...









☐ Delivery Date ☐ Priority shipping ☐ Show failed marketplace imports ☐ Show ONLY abandoned orders during checkout

No of results: 3 Results per page: 20 Max Results Page: 1

	Status	Order No.	Order date	Value	Site	Source	Name	Ship to	Deadline	Actions
1		10070	28/06/12 15:33	£33.72	Etail Demo	COMS: MDM	Mr Matt Morrison	LA139DF		
2		10022	08/06/11 14:01	£24.36	Etail Demo	Website	Mr Matt Morrison	LA129BN		
3		10021	08/06/11 08:39	£24.36	Etail Demo	Website	Mr Matt Morrison	LA129BN		

Bulk Despatch List Order Print List Invoice Print List

The little symbols under 'Status' are as follows:

	Status
1	  
2	    

Green cash: Order is fully paid.

Red Cash: Order is not paid.

Empty truck: Not despatched.

Part full truck: Some items despatched (if possible to despatch multiple items at different times)

Full truck: All items despatched.





Printer: How many times the order has been printed.

PP (PayPal): PayPal payment (hover over the see if it's pending or complete)






Clock with orange circle: Payment is pending.

Gold padlock: Order not released.

On Hold: This button allows you to put an order on hold e.g. if you think it may be a fraudulent transaction. This will stop it from being despatched & appearing on pick lists etc. Just click the red hold button to put an order on hold.

1	  	10103	17/11/13 14:00	£2.88	Etail Demo	Website	Mrs test test	TEST	
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Once an order is on hold, the red icon will move to the left. To remove an order from being on hold, press the green arrow.

2	   	10102	28/10/13 12:09	£11.82	Niche 2 - Brochure Test	COMS: KR	Miss Kim Ross	LA14 2PN	
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Back Order: If you have warehousing & purchase orders enabled, you might make use of the "Display & allow back ordering" stock control function. If an item is on back order, a little red 'B' will appear against that order/product in that order.

16	   	211908	26/11/13 10:41	£139.90		COMS			
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There are many reasons as to why these symbols appear. For a successful transaction, it's usually the green money, truck, printer & possibly PayPal if that's how they've paid (no special symbol for paying by SagePay).

Another combination can be **green money but the gold padlock**. This often happens when a customer's computer/browser has crashed during the transaction – the gold padlock is just a security measure and you can 'release' the order by viewing it, then scrolling down to 'Payment Details' and clicking the 'Manually Release Order' button.

[Manually Release Order](#)

If there is **red cash and a gold padlock** this means the order has not been paid. You can take additional payment (use 'Take additional payment' button), if they used the wrong card for example, or you can cancel the order if the customer wishes (see later on in the guide).

Please only use the Manually Release Order button if you have checked in Sage Pay or PayPal that payment has been taken, whether you have the green or red cash symbol.

To access the 'Manually Release Order' button, & the order in general, click the 'View' button (the magnifying glass) or the 'Order No.':

	Status	Order No.	Order date	Value	Site	Source	Name	Ship to	Deadline	Actions
1		10081	14/12/12 10:56	£20.24	Etail Demo	Website	Mr David Wright	LA14 2PN		

To cancel / despatch / return items, you need to go to 'Order Details'.

Cancel Items

Despatch Items

Return Items

VAT	Price	Status
0.00	35.00	

To despatch items, click the 'Despatch items' button. This will take you to the next screen where you select what items are being despatched. See below for how to despatch both Royal Mail (1st & 2nd Class) or via courier.

Despatching via Royal Mail (1st or 2nd Class)

If there's only one item in your order, or you want to despatch all items in that order (if they have the same tracking number), tick the first box (blue).

Order Item(s)	Qty	
Astoria Cricket Trousers Item 1	1	

If you're not despatching everything in the order, select the appropriate boxes:

- The second tick box (**black**) is to despatch all of that item (as people might have ordered more than one).
- The third box (**red**) is there as if someone has ordered multiples of that item but you only have half in stock, you can despatch as many as you have by ticking the appropriate amount of boxes.

You can then select the 'Despatch Selected Item(s)' button which will mark the items as despatched (see below if you're despatching via courier or priority service). From here, you also have the buttons 'Print Despatch Note', a box you can enter an order number in to go straight to it ('Next Order No box & 'Goto Next Order' button), or you can return to the previous screen by clicking 'Return to order'.

Set Courier	Set Tracking Number	Despatch Date
Select Courier		Friday 04 Jan
		Despatch Selected Item(s)

Print Despatch Note

Next Order No:

Goto Next Order

Return to order

You can also print your Despatch Note & Invoice on the main order screen, at the bottom, as well resend the order confirmation email to yourself – 'Resend Email Notification (Client)' – or to the customer – 'Resend Email Notification (Customer)'. This is often useful when peoples' confirmation emails have gone into their junk folder & they can't find them.

Order Details

Order Actions

Detailed Order View

Cancel Items

Despatch Items

Return Items

Reference	Description	Attributes	Quantity	Discount	Net Price	VAT	Price	Status
FS70621Q	21st Birthday Gift Photo Album - Personalised	Colour: Red, Size: 10	1	0.00	18.13	3.62	21.75	
	State engraving for plaque	Test						
	Additional Attributes	Engraving font: Times New Roman (£0.60)						
Delivery	Zone: UK Method: Weight band Service: 4-5 Days			0	8.25	0.0	8.25	
Order total				0.00	26.38	3.62	30.00	

Order Actions

Resend Email Notification (Client)

Resend Email Notification (Customer)

Print Despatch Note

Print Invoice

NB: Printing a despatch note or invoice will NOT send an email to the customer – all this information is contained within the confirmation/despatch emails themselves.

Despatching via courier

If there's only one item in your order, or you want to despatch all items in that order (if they have the same tracking number), tick the first box (**blue**).

Order Item(s)	Qty
Astoria Cricket Trousers	
Item 1	1

If you're not despatching everything in the order, select the appropriate boxes:

- The second tick box (**black**) is to despatch all of that item (as people might have ordered more than one).
- The third box (**red**) is there as if someone has ordered multiples of that item but you only have half in stock, you can despatch as many as you have by ticking the appropriate amount of boxes.

Once you've selected everything you want to despatch, this box will appear:

Set Courier	Set Tracking Number	Despatch Date
Select Courier		Friday 21 Dec
Despatch Selected Item(s)		

Print Despatch Note

Next Order No:

Goto Next Order

Return to order

Here you can select from the couriers that are set up, add your tracking number, & select the despatch date. Once all that is set up, you can click 'Despatch selected item(s)'.

Once this is done, you can also print the despatch note, go to the next order by typing in the order number, or return to the previous order screen.

Detailed Order Information



If you need to find out the tracking number for an item after it's been despatched, view the order, scroll to the bottom of the page & click 'Detailed Order View'.

Processing an order

Order Details									
Order Actions									
Detailed Order View									Return Items
Reference	Description	Attributes	Quantity	Discount	Net Price	VAT	Price	Status	
72046	Adidas Bellera Pro v1.1 Cricket Bat		1	0.00	00.00	20.00	119.99		

You'll then be able to see some extra information that wasn't on the previous page, such as who despatched the order, what service it was despatched by & the tracking number (if there is one).

Order No: 10075

Order Invoice Details		Order Delivery Details	Order Total: 128.51	
Miss Kim Ross Suite 4 Trinity Enterprise Centre Barrow-in-Furness LA14 2PN United Kingdom		Miss Kim Ross Suite 4 Trinity Enterprise Centre Barrow-in-Furness LA14 2PN United Kingdom		
Order Item(s)		Qty	Price	
Adidas Bellera Pro v1.1 Cricket Bat			119.99	
 Item 1			119.99	
		Despatched on 07/09/2012 12:37 by kim Courier: Royal Mail Tracking Number: 123456789	1	119.99
Shipping			8.52	
 UK - Weight band - 1-2 Days				8.52
Return to order				

Cancelling Items

Cancel Items - To cancel any items, click the 'Cancel item' button. **Cancelling items can only be done if the items haven't been despatched & are still in 'New Orders'.** The method is the same for cancelling & refunding items - please see below.

Refunding Items

This can only be done once the order has been despatched. Any orders that have been despatched will be in 'Search Orders' rather than 'New Orders'. There are a variety of functions you can use to search for an order.






Once you've found the order, click on the 'View' button (magnifying glass), scroll to the bottom, & click 'Return Items' to return them, or 'Cancel Items' to cancel them.

Order Details									
Order Actions									
Detailed Order View									Return Items
Reference	Description	Attributes	Quantity	Discount	Net Price	VAT	Price	Status	
	Canvas Print 8" x 8" - 20.5cm x 20.5cm								

Order Details									
Order Actions									
Detailed Order View							Cancel Items	Despatch Items	Return Items
Reference	Description	Attributes	Quantity	Discount	Net Price	VAT	Price	Status	
	Adidas Bellera Pro v1.1 Cricket Bat								

Order No: 10004

Order Invoice Details	Order Delivery Details	
Miss Kim Ross Trinity Enterprise Centre Barrow LA12 1AA United Kingdom	Miss Kim Ross Trinity Barrow LA12 1AA United Kingdom	Payment Total: £18.56 Cancel Amount: 0.00

Order Item(s)	Price	
 Bonjela Sugar Free Teething Gel 15gm	2.97	<input type="checkbox"/>
 Item 1	2.97	<input type="checkbox"/>
 Elvive Full Restore Conditioner 250ml	5.59	<input type="checkbox"/>
 Item 1	5.59	<input type="checkbox"/>
Shipping	£10.00	<input type="checkbox"/>
 Order Value - Next Day	£10.00	<input type="checkbox"/>

[Return to order](#)

To refund or cancel all the items in an order, please tick the tick box in the red header.

To refund or cancel any shipping charges, please tick the bottom tick box under the 'shipping' heading.

If you scroll down you'll see this screen:

Cancellation Details											
Reason:	Purchased wrong product.										
Customer message:	As discussed via phone call on 4/10/12										
Send email to Customer:	<input checked="" type="checkbox"/> This will include the Customer message above.										
Payments:	<table border="1"> <thead> <tr> <th>Payment type</th> <th>Provider</th> <th>Transaction</th> <th>Remarks</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Debit - Credit Card</td> <td>SagePay</td> <td>Purchase</td> <td>Card No: *****0006</td> <td>£18.56</td> </tr> </tbody> </table>	Payment type	Provider	Transaction	Remarks	Amount	Debit - Credit Card	SagePay	Purchase	Card No: *****0006	£18.56
Payment type	Provider	Transaction	Remarks	Amount							
Debit - Credit Card	SagePay	Purchase	Card No: *****0006	£18.56							
<input checked="" type="checkbox"/> Refund card. <input checked="" type="checkbox"/>											
Total Cancellation Amount: £8.56											
Cancel Selected Item(s)											

[Return to order](#)

You can add a reason for cancelling / refunding, and add a message to the customer to be sent as an email. If they have paid by SagePay, **make sure the 'Refund card' box has been ticked, or their card won't be refunded** and you'll have to do this via your SagePay account. There is no way to refund PayPal from COMS – COMS only says the refund has been process for your records. Please log in to PayPal & perform a manual refund if needed.

To cancel or refund the items, click the 'Cancel Selected Item(s)' or 'Refund Selected Item(s)' button. A popup will appear letting you know if your refund has been successful. If there are any problems with this, please contact the appropriate company (either ourselves or SagePay).

NB: If you're refunding anything that's been paid via Amazon, eBay or Play Trade, then you can mark it as refunded in COMS, but to actually process the refund, you'll need to go into your seller account / PayPal account & refund it from there.

Adding Items onto an Order

You can add items to an order even after it's been placed (but before it's been cancelled or despatched), as long as you have Sage Pay with MOTO set up. You will need to ask us to turn this feature on for you.

Once this is turned on, you'll need to scroll down to where the items are on the order, & click the "Add Order Item" button.

Add Order Item

Cancel Items

Despatch Items

Return Items

A new row will appear just above the products. Add the Client SKU Ref into the "Reference" box.

NB: You'll need to know the exact Client SKU Ref as there is no search box here.

Reference	Description	Attributes	Quantity	Wt-None	Discount	Net Price	VAT	Price	Status
abc			1						Add

Add the quantity you require, then click "Add".

This will then appear in the order Details section.

Reference	Description	Attributes	Quantity	Wt-None	Discount	Net Price	VAT	Price	Status
abc	Astoria Cricket Trousers Brand: 'h/a' Manufacturer: 'Mugler'		1	0.0	0.00	9.99	2.00	11.99	

COMS will then see the order as "Part Paid" – so you will need to take Additional Payment via MOTO. To do this, scroll up to where the Payment Details section is. On the right, there should be a "Take Additional Payment" button – click this & it will take you to the normal MOTO payment screen. Once payment is taken, this process is complete.

Other information

Product Margin

You can now see the product margin if you have suppliers set up in COMS – please contact us for more information.

Reference	Description	Attributes	Quantity	Wt-grms	Discount	Net Price	VAT	Price	Status
1002C	Digging Dog Garden Ornament - The Original Digger the Dog		1	3,500.0	0.00	20.83	4.16	24.99	
Product margin						11.83		56.8%	

Editing order information

You can also now edit delivery & invoice addresses, personalisation & add items to orders. Please contact us for more information.

If you need any more help with processing orders, please email support@etailsystems.com or call 0844 482 0908.