

## Etail Systems Tip Sheet

### Objective:

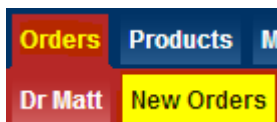
- To add an item(s) to an order & take additional payment via Sage Pay using the MOTO function.
- To edit the invoice address & delivery address on an order.
- To edit the personalisation text on an order.

The following tells you how to achieve this:-

If you have MOTO (mail order / telephone order) payment set up, then you can add items onto an order that a customer has already placed through the website, or a MOTO order that you/a member of your team has put through.

**NB: If you're not sure if you have MOTO set up or would like more information, please contact us.**

You can also edit the invoice & delivery address of an order, if a customer has made an error or they would like to send it somewhere else.



To start off editing an order, you'll need to go to Orders > New Orders & click on the order you wish to edit, by using the magnifying glass or clicking on the order number.

	Status	Order No.	Order date	Value	Site	Source	Name	Ship to	Deadline	Actions
1		10088	14/02/13 16:54	£28.50	Etail Demo	COMS: AB	Mr David Herington	LA11 7QN		

### Editing Invoice, Delivery & Email Addresses

You'll then see this screen. To edit the Email, Invoice &/or delivery address, click the 'Edit' button on the desired address.

Order Notes
Hide

Type / Product	Action	Note comment	Due date	User	Created
None	Complete				
Please select					

Customer Information
Hide

Site	Date	IP Address	Device / Order source
Etail Demo	08/06/2011 08:39	91.109.88.122	Unknown / Website

Web Browser

No web Browser information

Invoice Details Edit
Delivery Details Edit

Email Address: matt.x.1260787268\_per@etailsystems.com
Name: Mr Matt Morrison
Address: Marl Ulverston LA129BN United Kingdom
Tel:
Mobile:

Change Delivery address
Name: Mr Matt Morrison
Address: Marl Ulverston LA129BN United Kingdom
Tel:
Mobile:

# Editing orders & taking additional payment

Make your changes then click the 'Update' button.

**NB: If you're editing the order of a customer who's a member of your site, this will only change the order & not the member details.**

**Invoice Details** [Update](#)

Email Address:

Name:

Company:

Line 1:

Line 2:

Line 3:

Address:

Town:

County:

Postcode:

Tel:

Mobile:

## Adding an item to an order

To do this, you'll need the 'Order Details' sub-heading on the order screen near the bottom of the screen. Click 'Add Order Item'.

**Order Details**

Order Actions

Detailed Order View [Add Order Item](#) [Cancel Items](#) [Despatch Items](#) [Return Items](#)

Reference	Description	Attributes	Quantity	Wt-None	Discount	Net Price	VAT	Price	Status
<a href="#">THERM0001</a>	eBay Test Product	Colour: Blue	1	0.0	0.00	14.95	2.99	17.94	
Delivery	Zone: UK Method: Weight band Service: 1-2 Days				0.00	8.52	0.00	8.52	
Order total				0.0	0.00	23.47	2.99	26.46	

An extra line will now appear. You'll need to add your Client SKU Ref in the 'Reference' box, add a Quantity & then click 'Add'.

Reference	Description	Attributes	Quantity	Wt-None	Discount	Net Price	VAT	Price	Status
<a href="#">31357</a>			1						<a href="#">Add</a>
<a href="#">THERM0001</a>	eBay Test Product	Colour: Blue	1	0.0	0.00	14.95	2.99	17.94	
Delivery	Zone: UK Method: Weight band Service: 1-2 Days				0.00	8.52	0.00	8.52	
Order total				0.0	0.00	23.47	2.99	26.46	

Your item will then be added to the order.

## Taking Additional Payment

As you've now added an extra item to the order, it's classed as 'part paid' – if you scroll up to the 'Payment Details' section, you'll see the half green, half red cash icon indicating this.

Payment type	Provider	Date	Data	Reference	Status	Amount	Status
Debit - Credit Card	SagePay	03/09/2012 12:44	Card No: *****0006	5a588425-f671-4031-960a-106f469c97c5 Address: NOTMATCHED Postcode: NOTMATCHED CV2: MATCHED 3D Secure: NOTCHECKED	Purchase	£26.46	
Total						£26.46	

You'll now need to take additional payment via Sage Pay to correct this. Click the 'Take additional Sage Pay payment' button.

**Payment details** [Take additional SagePay payment](#)

Payment type	Provider	Date	Data	Reference	Status	Amount	Status
Debit - Credit Card	SagePay	03/09/2012 12:44	Card No: *****0006	5a588425-f671-4031-960a-106f469c97c5 Address: NOTMATCHED Postcode: NOTMATCHED	Purchase	£26.46	

## Editing orders & taking additional payment

Taking Additional payment from Sage Pay for £45.54

### Enter Card Details

Card Number \*  (enter without spaces)

Firstname \*  (name as it appears on card)

Surname \*  (name as it appears on card)

Valid From Month  Year  (if not present, leave blank)

Expiry date \* Month  Year  (if not present, leave blank)

Issue Number  (if not present, leave blank)

Security Code \*

Billing Address Line 1 \*

Billing Address Line 2

Billing City \*

Billing Country \*

Billing Post Code \*

This will then take you through to the Sage Pay MOTO page. Fill it in as you normally would, then click 'Proceed' in the bottom right.

Sage Pay will then check the transaction – this isn't instant & may take a little while to go through, depending on the speed of Sage Pay & your internet connection.

Taking Additional payment from Sage Pay for £45.54

Please wait while your transaction is authorised with the bank.

If everything has gone through fine, you will then get a success message. Click 'Continue' or if you want to go to any other tab in COMS, just click on it.

Taking Additional payment from Sage Pay for £45.54

Information
Additional payment added to order
<input type="button" value="Continue"/>

When you go back into the order, you'll now see there are more Sage Pay charges (the amount of however many Additional Payments you've put through), plus the Total here will now have been updated.

Payment type	Provider	Date	Data	Reference	Status	Amount	Status
Debit - Credit Card	SagePay	03/09/2012 12:44	Card No: *****0006	5a588425-f671-4031-960a-106f469c97c5 Address: NOTMATCHED Postcode: NOTMATCHED CV2: MATCHED 3D Secure: NOTCHECKED	Purchase	£26.46	
Debit - Credit Card	SagePay	05/06/2013 09:55	Card No: *****0006	a317fac6-0455-4cde-ba18-d46b2984089c Address: NOTMATCHED Postcode: NOTMATCHED CV2: MATCHED 3D Secure: NOTCHECKED	Purchase	£45.54	
Debit - Credit Card	SagePay	05/06/2013 10:00	Card No: *****0006	ad5df6d8-c6bc-4a9b-852d-c3b39f45479b Address: NOTMATCHED Postcode: NOTMATCHED CV2: MATCHED 3D Secure: NOTCHECKED	Purchase	£45.54	
<b>Total</b>						<b>£117.54</b>	

## Editing Personalisation Text

Order Details

Order Actions

Detailed Order View

Reference	Description	Attributes	Quantity	Unit Price	Discount	Net Price	VAT	Price	Status
36270	Personalised Love Heart Sweet Jar		1	3,001.0	0.00	7.49	1.50	8.99	
	Name on label	TEST145454							
	Message Line 1 (Max 20 characters)	TEST							
	Message Line 2 (Max 20 characters)	TEST							
	Message Line 3 (Max 20 characters)	TEST							

To do this, click into the order as described in the first part of this walkthrough. Scroll down to the bottom of the order screen to the 'Order Details' sub-heading. Click on the 'edit' button on the personalisation text you want to edit.

## Editing orders & taking additional payment

Name on label  TEST145454 Max 12 chars

You may be flicked back to the top of the order screen – scroll down again & you will now see this box & a new button.

Change the text & click the green 'update' button to save your changes. You've now successfully changed the personalisation text.

### Adding a promotion code

Some customers might have a promotional code, but have forgotten to enter it at the checkout. You can now add this & refund the customer's card the money they originally would have gotten off the order.

In the 'View Order' screen, scroll down to the 'Payment Details' section – under here you'll see a 'Promotion / Voucher Code' box.

Add Promotion / Voucher Code

Promotion / Voucher code   ☐ Create REFUND on Credit card or PayPal for Promotion value

Enter the promotional code or gift voucher in the box, tick the 'Create REFUND on Credit card or PayPal for Promotion value' tick box if applicable (which it will be in most cases, but not all) & then click the 'Add Code' button. The refund information/log of the voucher being inputted will appear in the 'Payment Details' section.

### General Information

Any changes are logged & traceable to the person who did them.

Change Log	
Date	Update
05/06/2013 09:59	Product 'BRIO Wooden Cooker (white)' order quantity increased by kim
05/06/2013 09:42	Additional product 'BRIO Wooden Cooker (white)' added to order by kim

If you need any help with editing an order, please call 0844 482 0908 or email [support@etailsystems.com](mailto:support@etailsystems.com).