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Etail Systems Tip Sheet

Objective: To create a manual order in COMS.

The following tells you how to achieve this;-

NB: If you're wanting to take manual orders over the phone, or by mail order, then you'll need to get a MOTO (mail order / telephone order) merchant number from your bank to enable you to take payments without the customer being present. Once you have this, you'll need to give it to Sage Pay, & we can then enble it in COMS.
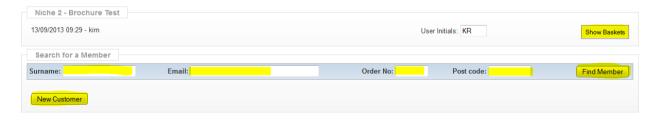
Firstly, you'll need to click the MOTO 2 tab in COMS. If you have any outstanding baskets, they will appear on this page (these could also be current orders which are currently being taken if you have multiple people on COMS at the same time). You can either create a new basket with the "New basket" button, or click on an empty basket. Enter your initials in the box provided.

MOTO 2	Orders	Products	Members	Sites	Site Admin	New Site	Admin	Reports	Home	Partner	Sign out

You are here | Client: Etail Demo (ID: 287899650) | Site: Etail Demo

Niche 2 - Brochure Test

User Initials: KR   New Basket

13/09/2013 09:29   kim   No name set   No email set   No products in basket   Use Basket

NB: Please try & use up all your baskets on a daily basis, or delete the unwanted baskets (see further on in this walkthrough on how to do this).

You'll now see the main screen on which you will create the order. The first part is the customer's information. If you want to return to the previous screen, click the "Show Baskets" button.
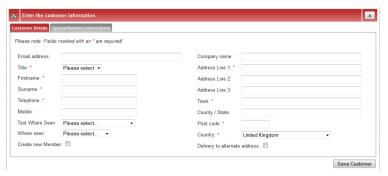
You now have 2 options when entering customer information – the first is if they're already a registered member - you can search using their surname, email address, previous order number or postcode. If there is only one match, it will enter the address information straight in. If there are various results, they will appear in a list & you select the desired information.

Niche 2 - Brochure Test

13/09/2013 09:29 - kim   User Initials: KR   Show Baskets

Search for a Member

Surname: [   ]   Email: [   ]   Order No: [   ]   Post code: [   ]   Find Member

New Customer

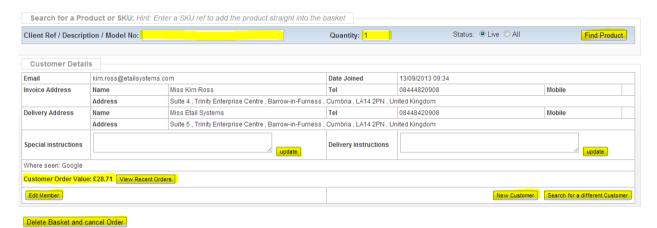Or secondly, you can click "New Customer" to enter new customer information.

NB: You can 'clone' a previous order if you wish – please see further down this walkthrough on how to do this.

Creating an order (via MOTO)

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You can enter all the customer's details here, as well as special or delivery instructions, an alternative delivery address & you can also create a member from this information if the customer is happy for you to do so. Once you've entered all this information, click "Save Customer".

Once you've entered that information, it should appear as below:

There are various options here if you need to edit any information – you can update the special & delivery instructions, edit the member information, search for a different customer, add a new customer, & also delete the basket. You can also view how much the customer has spent with you, & click the "View Recent Orders" button to view their recent orders.

The next step is to add the products to the basket. You can search by Client Ref, Description or Model Number, or enter the exact Client SKU Ref to quickly add the product to the basket. You can also select your quantity, & search from either Live products, or "All", meaning Live, New & Suspended.

A list will appear with all items matching that search. Click "Add" to add that product to your basket. You can also amend the quantity here.

Once you've added a product to your basket, you can add more items if needed. You can also remove items from your basket if needed.

You can amend the price of an item in that basket once it's been added.

Image	Description	Wt-None	Price	Quantity	Edit	Amount
	BRIO Donald and Airplane Ref: 32233 All Toys: AllToys, boy or girl ?: boy, age ?: 0, age ?: 1	0.000	£11.82	1	Update Remove	£ 11.82

NB: This will not change the item price against the product, it will just change the price for this particular order.

If you've added all the items, you can now select the shipping information (this only appears once you've added an item into your basket).

Basket						
Image	Description	Wt-None	Price	Quantity	Edit	Amount
30478_rattle_ring.jpg	BRIO My Very First Rattle Ring Ref: BRIO-30478	0.000	£8.64	1	Update Remove	£ 8.64
		Weight	0.000		Product Total	£8.64
Shipping	United Kingdom ▾ UK - Mainland ▾ 4-5 Days - £8.25 ▾				Update Shipping Cost	£ 8.25
Vouchers	Add Promotion or Voucher Add				Voucher Discount	£0.00
					VAT	£1.44
					Basket Total	£16.89

You can select the country & the shipping options, & you can also amend the shipping price if you wanted to, as well as the product prices. If you amend a price, click "Update" to save the changes. You can add Voucher codes here if needed & you can also remove them.

NB: Like the item price above, changing the shipping price will only change the price for this order.

Vouchers	Add Promotion Select Promotion ▾ or Voucher Add		Voucher Discount	£19.14
	Remove FREE	Free prod		

Once all that is complete, you can scroll down to the "Payment" section at the bottom of the screen.

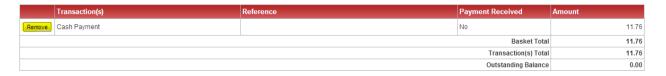| Payment			
Payment type	**Payment Provider type**		
Debit - Credit Card ▾	SagePay ▾		TAKE CARD PAYMENT

The payment type & payment provider types will differ here depending on what you have set up in COMS. If you'd like to know about different payment options, please contact us.

Once you've selected your payment options, click the button on the right (in this case it's "TAKE CARD PAYMENT", but it could also be "Complete order" in the bottom right of the screen if you've selected cash, cheque or invoice payment).

	Transaction(s)	Reference	Payment Received	Amount
Remove	Cash Payment		No	11.76
			Basket Total	11.76
			Transaction(s) Total	11.76
			Outstanding Balance	0.00

Delete Basket and cancel Order   complete order

NB: If you've selected "Cash" or "Cheque" payment & realise you have selected the wrong one, you can remove this payment & reselect the correct one.

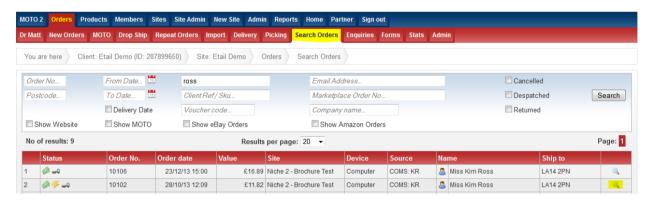|	Transaction(s)	Reference	Payment Received	Amount
Remove	Cash Payment		No	11.76
			Basket Total	11.76
			Transaction(s) Total	11.76
			Outstanding Balance	0.00

If you're using Sage Pay, this will take you through to the Sage Pay payments screen. Enter the customer's details, & click "Proceed" to take payment, or "Cancel" if you need to cancel the transaction.

You should then get a screen with the message "Processing finished". & after a few seconds, you'll be redirected to the Order in New Orders. Your MOTO order is now complete!
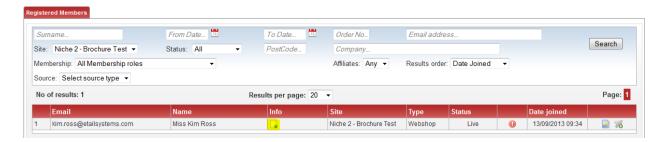
Cloning orders

There are 2 ways of "cloning" previous orders – using the order or using the member. Both are detailed below:

- **Cloning an order from an older order** – go into Orders > Search Orders & use the boxes to enter information & find the order (see below).

Click the **Create new Basket** button in the top right hand corner of the screen, which will take you through to a new basket with that product & customer information already in it.

If you'd prefer to search via the member, you'll need to go into the Members tab, & search for the customer. Click the icon under "info" (this only appears if the customer has ordered).

This will take you through to the Members order page. Click on the order you wish to clone.

Order No.	Order date	Site	Source	Name	Deadline	Value	
10106	23/12/13 15:00	Niche 2 - Brochure Test	COMS	Miss Kim Ross		16.89	View
10102	28/10/13 12:09	Niche 2 - Brochure Test	COMS	Miss Kim Ross		11.82	View
Total Order value						28.71	

You'll then be taken to the order page & as above, you'll need to click the [Create new Basket] button in the top right hand corner of the screen.

Adding items onto an order

If a customer is wanting to add items onto an order which has **NOT** been despatched, you can do this using MOTO. Please ask for the "Editing orders & taking additional payment" walkthrough.

If you have any questions regarding MOTO orders, please call 0844 482 0908 or email support@etailsystems.com