

Sales Orders

This article describes the management of sales orders in Opencart for WebStupet clients. After reading this article you will be able to edit, delete, and process sales orders generated by your online store.

Managing Sales Orders

1. Each time a sales order is created Opencart sends an email to the store email established in your store setup. The subject is your store name and the order number.
2. To access orders, Log into your WebStupet Opencart administration account.
3. You can either expand the Sales Menu and click Orders or click the View More link under total orders to access all of your orders.





The screenshot displays the Opencart administration dashboard. On the left is a dark navigation sidebar with a 'SALES' menu item highlighted by two red arrows. The main content area shows a 'Dashboard' header with a breadcrumb 'Home > Dashboard'. Below the header are two blue summary cards: 'TOTAL ORDERS' with a value of '3' and a 'View more...' link (circled in red), and 'TOTAL SALES' with a value of '1.8K' and a 'View more...' link. Below these cards is a 'World Map' section with a map and zoom controls. At the bottom, there are sections for 'Recent Activity' (showing 'No results!') and 'Latest Orders' (with columns for 'Order ID' and 'Customer').

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4. In most cases, you will be able to take all necessary actions to manage the sales order by clicking the view button next to the order.

Orders Home > Orders

Order List

<input type="checkbox"/>	Order ID	Customer	Status	Total	Date Added	Date Modified	Action
<input type="checkbox"/>	16	Sam Doe	Pending	\$106.00	13/09/2018	13/09/2018	
<input type="checkbox"/>	15	Jane Doe	Pending	\$105.00	13/09/2018	13/09/2018	
<input type="checkbox"/>	14	Jane Doe	Pending	\$1,605.00	13/09/2018	13/09/2018	
<input type="checkbox"/>	12	John Doe	Pending	\$112.57	13/09/2018	13/09/2018	

Showing 1 to 4 of 4 (1 Pages)

1. The view screen shows the basic order information, customer information, and shipping address.

Orders Home > Orders




Order Details

- WebStupet Demo
- 13/09/2018
- Cash On Delivery
- Flat Shipping Rate

Customer Details

- Sam Doe
- Default
- sam@webstupet.com
- 6547894561

Options

- Invoice 
- Reward Points 0 
- Affiliate \$0.00 

Order (#16)

Payment Address		Shipping Address	
Sam Doe 1234 S. 2nd Small Town, Kentucky 22222 United States		Sam Doe 1234 S. 2nd Small Town, Kentucky 22222 United States	

Product	Model	Quantity	Unit Price	Total
iPhone	product 11	1	\$101.00	\$101.00
			Sub-Total	\$101.00
			Flat Shipping Rate	\$5.00
			Total	\$106.00

2. The buttons in the right corner allow you to print the invoice, print the shipping list, or edit

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(edit instructions follow)

The screenshot shows the 'Orders' page with a navigation bar at the top right containing icons for lock, share, edit, and refresh. The main content is divided into three sections: 'Order Details', 'Customer Details', and 'Options'. The 'Order Details' section lists 'WebStupet Demo', the date '13/09/2018', 'Cash On Delivery', and 'Flat Shipping Rate'. The 'Customer Details' section lists 'Sam Doe', 'Default', 'sam@webstupet.com', and '6547894561'. The 'Options' section lists 'Invoice', 'Reward Points' (0), and 'Affiliate' (\$0.00). Below these sections is a table for 'Order (#16)' with columns for 'Payment Address' and 'Shipping Address', both containing the same address: 'Sam Doe, 1234 S. 2nd, Small Town, Kentucky 22222, United States'.

- Product details, quantity, and pricing information are listed in the Product Grid. Each product is listed on a different line. Multiples are the same product are shown by a quantity greater than one.

The screenshot shows the 'Product Grid' for 'Order (#14)'. It features a table with columns: Product, Model, Quantity, Unit Price, and Total. The table lists two products: 'Canon EOS 5D' (Product 3, \$100.00, 1) and 'MacBook' (Product 16, \$500.00, 3). The quantity '3' for the MacBook is circled in red. Below the table are rows for 'Sub-Total' (\$1,600.00), 'Flat Shipping Rate' (\$5.00), and 'Total' (\$1,605.00). Red arrows point to the product names 'Canon EOS 5D' and 'MacBook'.

Product	Model	Quantity	Unit Price	Total
Canon EOS 5D	Product 3	1	\$100.00	\$100.00
MacBook	Product 16	3	\$500.00	\$1,500.00
			Sub-Total	\$1,600.00
			Flat Shipping Rate	\$5.00
			Total	\$1,605.00

- If you had the customer select options the values input or selected by the customer are shown in the product name column. If the user uploaded a file it can be accessed by clicking the link next to the option name.

The screenshot shows the 'Product Grid' for an 'Apple Cinema 30"'. The product name column contains custom options: 'Plaque Image: logo1.png', 'Engraved Date: 2018-09-13', and 'Engraving Text: Congratulations Jane on a job well done'. These options are enclosed in a red box. The table also shows 'Product 15', 'Quantity' 1, 'Unit Price' \$100.00, and 'Total' \$100.00. Below the table are rows for 'Sub-Total' (\$100.00), 'Flat Shipping Rate' (\$5.00), and 'Total' (\$105.00).

Product	Model	Quantity	Unit Price	Total
Apple Cinema 30" Plaque Image: logo1.png Engraved Date: 2018-09-13 Engraving Text: Congratulations Jane on a job well done	Product 15	1	\$100.00	\$100.00
			Sub-Total	\$100.00
			Flat Shipping Rate	\$5.00
			Total	\$105.00

5. If the customer included a comment, the comment is listed below the Product Grid.

Order (#12)

Payment Address	Shipping Address
John Doe 123 Main St Somewhere, Kansas - Except Douglas County 67777 United States	John Doe 123 Main St Somewhere, Kansas - Except Douglas County 67777 United States

Product	Model	Quantity	Unit Price	Total
iPhone	product 11	1	\$101.00	\$101.00
				Sub-Total
				\$101.00
				Flat Shipping Rate
				\$5.00
				KS Sales Tax
				\$6.57
				Total
				\$112.57

Customer Comment

Please ship ASAP

6. At the bottom of the Order View screen you can review and update the status of the order in the Order History section. Status updates should follow your business procedures for processing and shipping orders.

1. The top section shows the history of order processing.

History Additional

Date Added	Comment	Status	Customer Notified
13/09/2018		Processed	No
13/09/2018		Processing	No
13/09/2018		Pending	No

Showing 1 to 3 of 3 (1 Pages)

Add Order History

Order Status: Processed

Override

Notify Customer

Comment:

[Add History](#)

2. You can update the status using the bottom section.

Order History

History Additional

Date Added	Comment	Status	Customer Notified
13/09/2018		Processed	No
13/09/2018		Processing	No
13/09/2018		Pending	No

Showing 1 to 3 of 3 (1 Pages)

Add Order History

Order Status: Shipped

Override

Notify Customer

Comment: Thank you for ordering. We have shipped your order.

Add History

1. **Order Status:** Select the Order Status, to which you want the order updated. You can add, delete, and edit order statuses, if the standard values do not match your business processes. See <https://help.webstupet.com/assets/files/Order%20Status%20Maintenance.pdf> for details.
2. **Override:** Check to override fraud status.
3. **Notify Customer:** Check if you want the customer to be sent an email updating him or her of the order status. Do not check if you do not want the customer notified.
4. **Comments:** Input comments related to the status change. Be careful! The comments are sent to the customer if Notify Customer is checked.

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3. Click Add History to add the record.

History Additional

Date Added	Comment	Status	Customer Notified
13/09/2018		Processed	No
13/09/2018		Processing	No
13/09/2018		Pending	No

Showing 1 to 3 of 3 (1 Pages)

Add Order History

Order Status: Shipped

Override

Notify Customer

Comment: Thank you for ordering. We have shipped your order.

Add History

4. The history grid is updated.

Date Added	Comment	Status	Customer Notified
13/09/2018	Thank you for ordering. We have shipped your order.	Shipped	Yes
13/09/2018		Processed	No
13/09/2018		Processing	No
13/09/2018		Pending	No

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5. If you have a large number of orders, you may want to reduce the list you are viewing by applying filters. In the filters box on the right, input the information about the order(s) you want to view. Use % as a wild card. Click Filter to apply the filter.

The screenshot displays the 'Orders' management interface. On the left, there is an 'Order List' table with the following data:

Order ID	Customer	Status	Total	Date Added	Date Modified	Action
15	Jane Doe	Pending	\$105.00	13/09/2018	13/09/2018	[Eye icon]
14	Jane Doe	Pending	\$1,605.00	13/09/2018	13/09/2018	[Eye icon]
12	John Doe	Pending	\$112.57	13/09/2018	13/09/2018	[Eye icon]

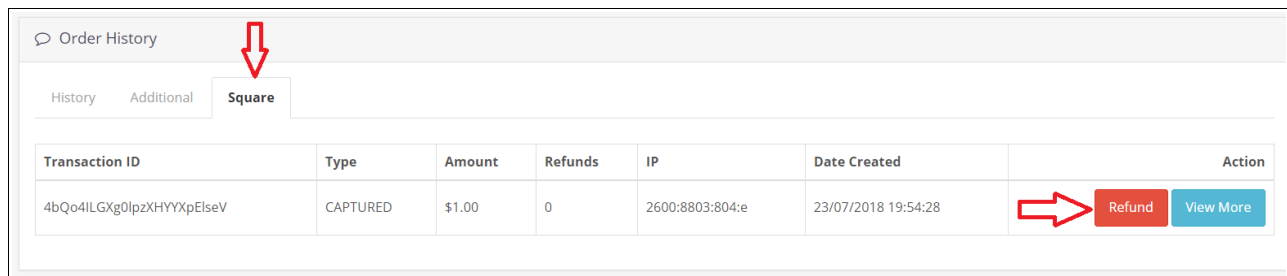
Below the table, it says 'Showing 1 to 3 of 3 (1 Pages)'. On the right side, there is a 'Filter' sidebar with the following sections:

- Order ID**: Input field for Order ID.
- Customer**: Input field containing 'J% Doe'.
- Order Status**: Dropdown menu.
- Total**: Input field for Total.
- Date Added**: Input field with a calendar icon.
- Date Modified**: Input field with a calendar icon.

A red arrow points to the 'Filter' button at the bottom of the sidebar.

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- Refunding a sales order varies depending upon the method of payment option you are using. Opencart does not store credit or debit card information so if the payment card information is required, you have to contact the customer to process the refund. However, some merchants associate a token, as a part of their integration to Opencart, to be used to refund a specific transaction. Square is one example. In this case a Square tab is shown in the history section. Click the tab then click Refund to refund the order. Remember to change the order status to Refunded afterwards.



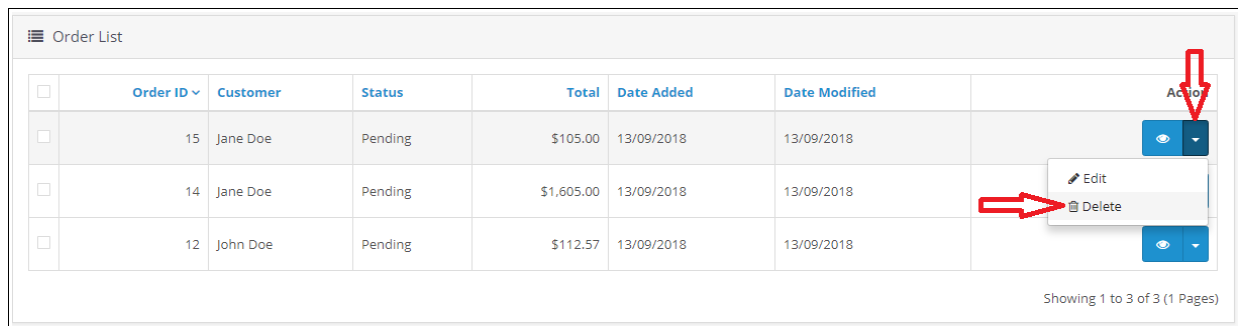
The screenshot shows the 'Order History' section of a web application. At the top, there is a search icon and the text 'Order History'. Below this, there are three tabs: 'History', 'Additional', and 'Square'. A red arrow points down to the 'Square' tab. Below the tabs is a table with the following columns: 'Transaction ID', 'Type', 'Amount', 'Refunds', 'IP', 'Date Created', and 'Action'. The table contains one row with the following data: Transaction ID: 4bQo4ILGxg0lpzXHYYXpElseV, Type: CAPTURED, Amount: \$1.00, Refunds: 0, IP: 2600:8803:804:e, Date Created: 23/07/2018 19:54:28. In the 'Action' column, there are two buttons: a red 'Refund' button and a blue 'View More' button. A red arrow points to the 'Refund' button.

Transaction ID	Type	Amount	Refunds	IP	Date Created	Action
4bQo4ILGxg0lpzXHYYXpElseV	CAPTURED	\$1.00	0	2600:8803:804:e	23/07/2018 19:54:28	Refund View More

Deleting Sales Orders

You have the ability delete sales orders; however, WebStupet does not recommend that you delete an actual order received from a customer. It is a better practice to set the order status to a status such as canceled so that a record of the sales order remains. However, if you have input test orders deleting may be appropriate.

1. To delete click the down arrow then click Delete.



The screenshot shows a table titled "Order List" with columns: Order ID, Customer, Status, Total, Date Added, Date Modified, and Actions. Three orders are listed. The "Actions" column for the second order (ID 14) is expanded, showing "Edit" and "Delete" options. Red arrows point to the down arrow in the Actions column and the "Delete" option.

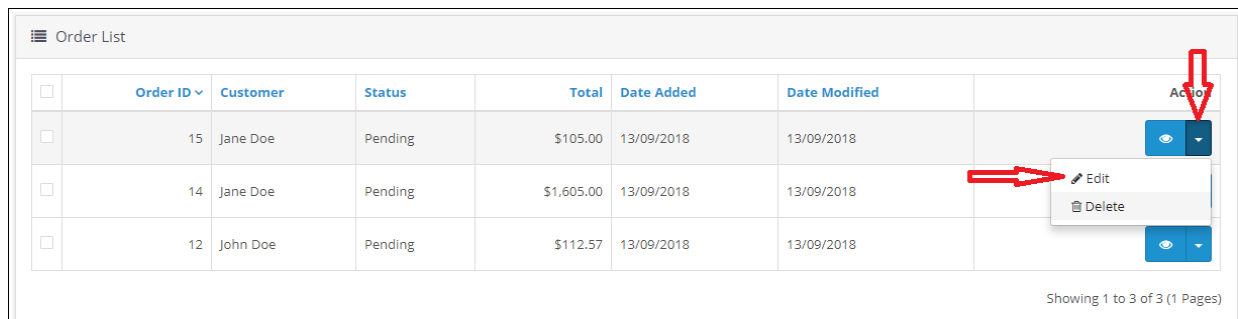
	Order ID	Customer	Status	Total	Date Added	Date Modified	Actions
<input type="checkbox"/>	15	Jane Doe	Pending	\$105.00	13/09/2018	13/09/2018	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	14	Jane Doe	Pending	\$1,605.00	13/09/2018	13/09/2018	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Edit <input type="checkbox"/> Delete
<input type="checkbox"/>	12	John Doe	Pending	\$112.57	13/09/2018	13/09/2018	<input type="checkbox"/> <input type="checkbox"/>

Showing 1 to 3 of 3 (1 Pages)

Editing Sales Orders

You have the ability to edit orders; however, if you have received payment for the order, WebStupet does not recommend you change anything affecting the order total. This is especially true for credit or debit card payment types because Opencart does not store payment card information so the receiving any additional amount is problematic. A better method is to input another order and, if necessary, refund the current order.

1. To edit click the down arrow then click Edit.



The screenshot shows the same "Order List" table as above. The "Actions" column for the second order (ID 14) is expanded, showing "Edit" and "Delete" options. Red arrows point to the down arrow in the Actions column and the "Edit" option.

	Order ID	Customer	Status	Total	Date Added	Date Modified	Actions
<input type="checkbox"/>	15	Jane Doe	Pending	\$105.00	13/09/2018	13/09/2018	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	14	Jane Doe	Pending	\$1,605.00	13/09/2018	13/09/2018	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Edit <input type="checkbox"/> Delete
<input type="checkbox"/>	12	John Doe	Pending	\$112.57	13/09/2018	13/09/2018	<input type="checkbox"/> <input type="checkbox"/>

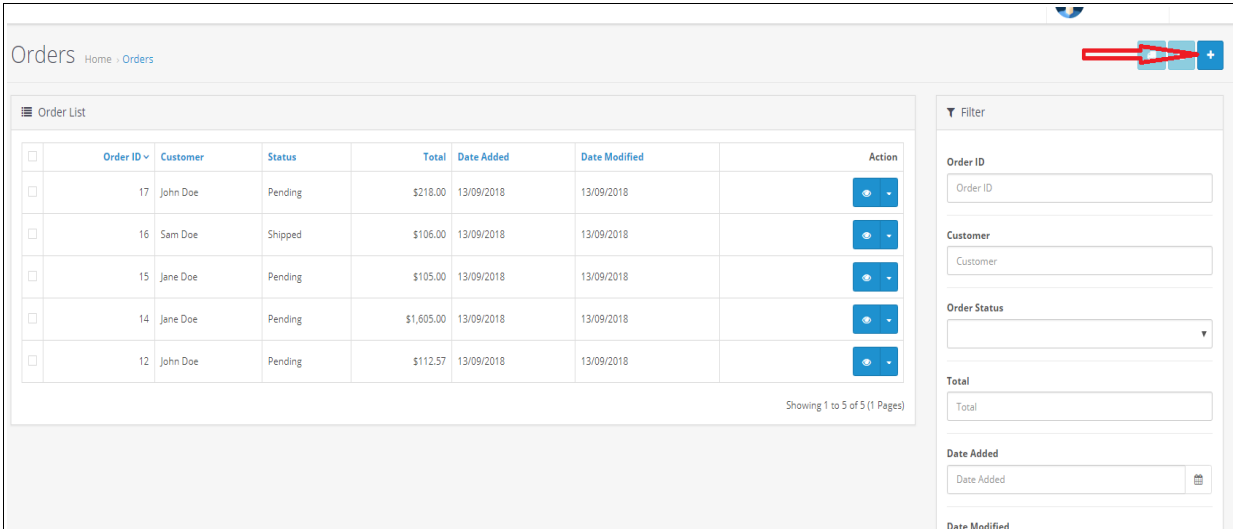
Showing 1 to 3 of 3 (1 Pages)

2. The Order Input screen appears. See Add New Order section for data field definitions.

Add New Order

You may need to use the Add New Order functionality if your business allows customer to order over the phone or, if you want to use the Opencart system as an inventory system, you need to enter sales orders for sales that occurred at any physical locations you operate. Unlike in the storefront, the Opencart New Order functionality on the administration site does not allow you to take electronic forms of payment, such as credit cards, debit card, or PayPal. Therefore, you need to have a separate business procedure in place to take payments over the phone or in person before you allow these types of orders. If you use a method of payments where customers pay later, such as cash on delivery, Opencart functionality alone should be sufficient to take these orders.

1. To start a new order click the Add button



Orders Home Orders

Order List

Order ID	Customer	Status	Total	Date Added	Date Modified	Action
17	John Doe	Pending	\$218.00	13/09/2018	13/09/2018	[Action]
16	Sam Doe	Shipped	\$106.00	13/09/2018	13/09/2018	[Action]
15	Jane Doe	Pending	\$105.00	13/09/2018	13/09/2018	[Action]
14	Jane Doe	Pending	\$1,605.00	13/09/2018	13/09/2018	[Action]
12	John Doe	Pending	\$112.57	13/09/2018	13/09/2018	[Action]

Showing 1 to 5 of 5 (1 Pages)

Filter

Order ID
Order ID

Customer
Customer

Order Status
Order Status

Total
Total

Date Added
Date Added

Date Modified
Date Modified

Customer Details Tab

1. Customer Details	2. Products	3. Payment Details	4. Shipping Details	5. Totals
Store	Default			
Currency	US Dollar			
Customer	Jane Doe			
Customer Group	Default			
* First Name	Jane			
* Last Name	Doe			
* E-Mail	idk@idk.com			
* Telephone	123456789			
				Continue

1. **Store:** Leave “Default” selected for basic setup.
2. **Currency:** Input is required. Select the currency, in which the product is sold.
3. **Customer:** Input is optional. Select the WebStupet customer account and customer information will be populated automatically. For guest orders select –none--, you will be required to input the customer information.
4. **Customer Group:** Leave “Default” selected for basic setup.
5. **First Name:** Input the customer's first name. This field is required.
6. **Last Name:** Input the customer's last name. This field is required.
7. **E-mail:** Input the customer's e-mail. This field is required.
8. **Telephone:** Input the customers phone number. This field is required.
9. Click the Continue button.

Products Tab

1. To add a product put the cursor in the Choose Product text box and click the desired product. If your setup has more than five products you may need to type the first few letters of the product name to be able to select it.
2. Input the the quantity in the Quantity text box.

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3. Click Add Product

Product	Model	Quantity	Unit Price	Total	Action
Canon EOS 5D	Product 3	1	\$100.00	\$100.00	
MacBook	Product 16	3	\$500.00	\$1,500.00	

Products Vouchers

Add Product(s)

Choose Product

Quantity: 1

Back Add Product Continue

4. If there are options associated with the product selected, a Choose Options grid will appear. Input or select the proper values in the Choose Options grid before clicking the Add Product Button.

Products Vouchers

Add Product(s)

Choose Product: Apple Cinema 30"

Quantity: 1

Choose Option(s)

- * Engraved Date: Engraved Date
- * Plaque Image: Upload
- * Engraving Text: [Text Area]



Back Add Product Continue

5. Repeat until the appropriate products are added to the order.
6. You can edit the quantity of the products already on the order by changing the quantity on the product line and clicking refresh.

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Edit Order

1. Customer Details 2. Products 3. Payment Details 4. Shipping Details 5. Totals




Product	Model	Quantity	Unit Price	Total	Action
Canon EOS 5D	Product 3	1	\$100.00	\$100.00	
MacBook	Product 16	3	\$500.00	\$1,500.00	

Products Vouchers

Add Product(s)

Choose Product



Quantity

7. To delete a product line click the Delete action button.

Edit Order

1. Customer Details 2. Products 3. Payment Details 4. Shipping Details 5. Totals




Product	Model	Quantity	Unit Price	Total	Action
Canon EOS 5D	Product 3	1	\$100.00	\$100.00	
MacBook	Product 16	3	\$500.00	\$1,500.00	

Products Vouchers

Add Product(s)

Choose Product

Quantity

8. After you are finished adding and editing products click Continue.

Payment Details Tab

Edit Order

1. Customer Details 2. Products 3. Payment Details 4. Shipping Details 5. Totals

Choose Address: --- None ---

* First Name: Jane

* Last Name: Joe

Company:

* Address 1: 456 1st Street

Address 2:

* City: Anywhere

Postcode: 123456

* Country: United States

* Region / State: Georgia

Back Continue

1. **Choose Address:** If a customer account was selected for the order and the billing address is setup for the account, you can choose the address and all of the billing address information will be populated automatically. Otherwise input do not select and input the billing information manually.
2. **First Name:** Input the first name of the person to be billed. This field is required.
3. **Last Name:** Input the last name of the person to be billed. This field is required.
4. **Company:** Input the company to be billed. This field is optional.
5. **Address 1:** Input the first line of the billing address. This field is required.
6. **Address 2:** Input the second line of the billing address. This field is required.
7. **City:** Input the billing city. This field is required.
8. **Postcode:** Required for US addresses. Input the billing Zip Code.
9. **Country:** Select the billing country. This field is required.
10. **Region/State:** Select the billing region or state. This field is required.

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11. Click Continue.

Shipping Details Tab

Edit Order

1. Customer Details 2. Products 3. Payment Details **4. Shipping Details** 5. Totals

Choose Address: --- None ---

* First Name: Jane

* Last Name: Joe

Company:

* Address 1: 456 1st Street

Address 2:

* City: Anywhere

Postcode: 123456

* Country: United States

* Region / State: Georgia

Back Continue

1. **Choose Address:** If a customer account was selected for the order and the shipping address is setup for the account, you can choose the address and all of the shipping address information will be populated automatically. Otherwise do not select input and input the shipping information manually.
2. **First Name:** Input the first name, to whom the product(s) will be shipped. This field is required.
3. **Last Name:** Input the last name, to whom the products(s) will be shipped. This field is required.
4. **Company:** Input the company, to which the product(s) will be shipped. This field is optional.
5. **Address 1:** Input the first line of the shipping address. This field is required.
6. **Address 2:** Input the second line of the shipping address. This field is required.
7. **City:** Input the shipping city. This field is required.

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8. **Postcode:** Required for US addresses. Input the shipping Zip Code.
 9. **Country:** Select the shipping country. This field is required.
 10. **Region/State:** Select the shipping region or state. This field is required.
- Click Continue.

Totals Tab

Product	Model	Quantity	Unit Price	Total
Canon EOS 5D	Product 3	1	\$100.00	\$100.00
			Sub-Total:	\$100.00
			Total:	\$100.00

Order Details

Shipping Method: Apply

Payment Method: Apply

Coupon: Apply

Voucher: Apply

Reward: Apply

Order Status: Apply

Comment:

Affiliate:

Back Save

1. Shipping Method: Select the appropriate shipping method and click apply.
2. Payment Method: Select the appropriate payment method and click apply.
3. Coupon: Coupons are considered advanced functionality and are not addressed in this documentation.
4. Voucher: Vouchers are considered advanced functionality and are not addressed in this documentation.
5. Reward: Reward Points are considered advanced functionality and are not addressed in this documentation.
6. Order Status: Select the appropriate order status.
7. Comments: Input is optional. Input any comments associated with the order.
8. Affiliate: Affiliates are considered advanced functionality and are not addressed in this



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documentation.

9. Click Save