

# Managing Orders

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## Managing Orders

As a shop manager, you will have to deal with heaps of orders and their accompanying invoices and customer support requests – at least, that's what we wish for you. The daily task of handling numerous orders can be daunting. Luckily PrestaShop does its best to help you wade through them all and successfully handle your customers' purchases, along with credit slips and the unavoidable merchandise returns.

The "Orders" tab enables you to see all of the information about all the purchases from your store. All of your store's transactions are available there, organized by date (by default, it is set to sort from newest to oldest).

Page 1 / 1 | Display 50 / 1 result(s) Reset Filter

ID	New	Customer	Total	Payment	Status	Date	PDF	Actions
1	<span>NEW</span>	J. DOE	625,98 €	Chèque	Awaiting cheque payment	2011-06-01 15:33:15		

**Total: 625,98 €**

You can filter the results and easily find the orders you're looking for by using the fields above. For instance, to identify Mr. Doe's orders, type Doe into the "Customer" field and then click "Filter".

## Viewing Order Details

In order to process the orders you receive, you have to view the information they contain. Click on the line containing the order, or click on the button to the right of the order.

The order detail sheet fills a full page.

## John DOE - Order #000001

No invoice - No delivery slip - Print page

2011-06-01 15:33:15 Awaiting cheque payment

Awaiting cheque payment Change

### Customer information

**John DOE (#1)**  
(pub@prestashop.com)

Account registered: 2011-06-01 15:33:15  
Valid orders placed: 0  
Total paid since registration: 0,00 €

### Shipping address

John DOE  
My Company  
16, Main street  
2nd floor  
75000 Paris  
France  
0102030405



### Invoice

No invoice yet.

### Shipping information

Total weight: 0.000 kg  
Carrier: My carrier

### Order details

Original cart: Cart #000001

Payment mode: Chèque (cheque)

Products	618,00 €
Shipping	7,98 €
<b>Total</b>	<b>625,98 €</b>

Recycled package: Gift wrapping:

### Invoice address

John DOE  
My Company  
16, Main street  
2nd floor  
75000 Paris  
France  
0102030405



### Products

Product	UP *	Qty	Stock	Total *		Cancel
iPod touch - Capacité: 32Go	469,00 €	1	70	469,00 €		<input type="text"/> 0/1
Écouteurs à isolation sonore Shure SE210	149,00 €	1	1	149,00 €		<input type="text"/> 0/1

\* According to the group of this customer, prices are printed: tax included.

Merchandise returns are disabled

[Cancel products](#)

### New message

[Click here](#) to add a comment or send a message to the customer

### Merchandise returns

No merchandise return for this order.

### Credit slip

No slip for this order.

This summary of the order gives you access to:

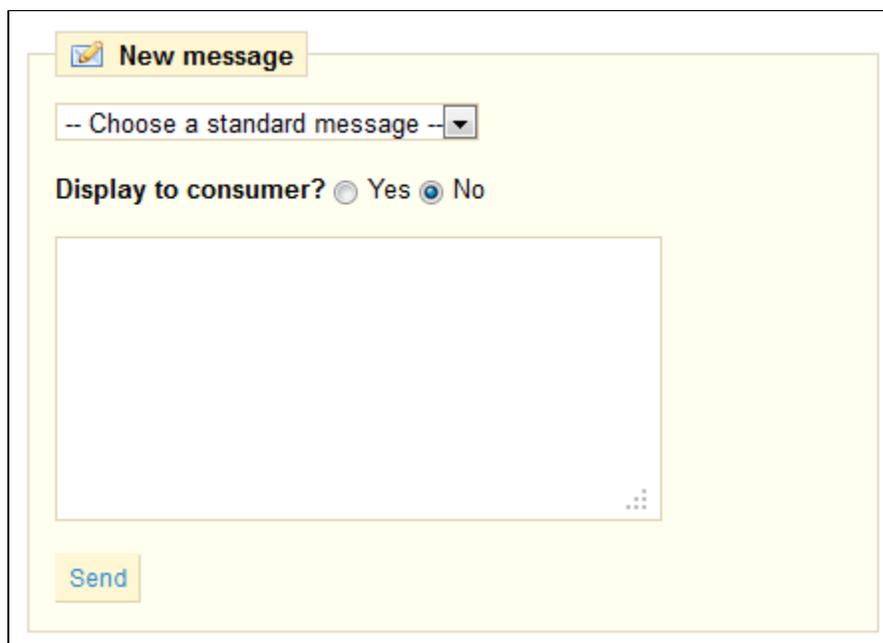
- The status and history of the order.
- The carrier information, total weight of order and carrier chosen by the customer.
- The method of payment that was used, the cost of the products, and the shipping costs.

- Various details on the ordered products.

In the "Shipping address" of the page, you can see a "G" icon: the enables you to use Google Maps to locate the address on a map.

### **Sending a message to your customer**

In the "New Message" section, at the bottom of the page, you can send a message to your customer to give him information concerning the order, a delay, a surprise, or keep him informed on offers and specials. This is key to good business.



- You can send a message by writing it in the message box.
- Pre-written message can be saved and used multiple times, saving you the hassle of writing them over and over again. If you would like to send one of these messages, select it from the drop-down menu. You can add further details to the pre-written message if needed

In both of these cases, once your message is ready, click "Send". Your customer will receive your message in their inbox (the one indicated in their account).

### **Invoices**

Each time an order from your store is validated, an invoice is sent out to the customer. If there are no problems, the order status will read "OK" or "Payment accepted." You can download it directly from the order summary by clicking the "Invoice" section in the top right-hand corner of the page.

The customer will be able to access the invoice by going to his account.

### **Printing Invoices**

If you want to print several invoices at the same time, head to the sub-tab "Invoices" under the "Orders" tab. The invoice interface will appear.

In order to print several invoices, fill in the date range in the "From" and "To" fields in the "Print PDF invoices" section and create PDFs by clicking on "Generate PDF file."

## Print PDF invoices

### By date

From:  \*

Format: 2007-12-31 (inclusive)

To:  \*

Format: 2008-12-31 (inclusive)

[Generate PDF file](#)

\* Required fields

### By statuses

Statuses :

- Awaiting bank wire payment (0)
- Awaiting cheque payment (1)
- Awaiting PayPal payment (0)
- Canceled (0)
- Delivered (0)
- On backorder (0)
- Payment accepted (0)
- Payment error (0)
- Payment remotely accepted (0)
- Preparation in progress (0)
- Refund (0)
- Shipped (0)

You can also export orders which have not been charged yet. ()

[Generate PDF file](#)

In the second section "Invoice Options", you can choose whether or not invoices should be printed as soon as the order is made, as well as the Invoice Prefix and the invoice number you want listed on the printed version of the invoice. This feature can help you simplify the management of your account. Finally, you can add a text that will appear at the bottom of all your invoices.

## Invoice options

### Invoice options

Enable invoices:  Yes  No

Select whether or not to activate invoices for your shop

Invoice prefix:  

Prefix used for invoices

Invoice number:

The next invoice will begin with this number, and then increase with each additional invoice. Set to 0 if you want to keep the current number (#1).

Free Text:

This text will appear at the bottom of the invoice

[Save](#)

When your customers ask for their invoices, you can redirect them to the Order History section of their user accounts, which keeps all of their invoices available for them.

Home > My account > Order history

**ORDER HISTORY**

Here are the orders you have placed since the creation of your account.

Order	Date	Total price	Payment	Status	Invoice
<a href="#">#000001</a>	2011-06-01	625,98 €	Chèque	Delivered	<a href="#">PDF</a> <a href="#">details</a>

## Statuses

Having different order statuses lets you easily manage your customers. These different statuses are visible and editable in the "Order Statuses" tab.

Add new

Page 1 / 1 | Display  / 12 result(s) [Reset](#) [Filter](#)

<input type="checkbox"/>	ID	Name	Icon	Send e-mail to customer	Invoice	E-mail template	Actions
<input type="checkbox"/>	--	<input type="text"/>	--	<input type="text"/>	<input type="text"/>	<input type="text"/>	--
<input type="checkbox"/>	1	Awaiting cheque payment		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	cheque	
<input type="checkbox"/>	2	Payment accepted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	payment	
<input type="checkbox"/>	3	Preparation in progress		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	preparation	
<input type="checkbox"/>	4	Shipped		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	shipped	
<input type="checkbox"/>	5	Delivered		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	delivered	
<input type="checkbox"/>	6	Canceled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	order_canceled	
<input type="checkbox"/>	7	Refund		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	refund	
<input type="checkbox"/>	8	Payment error	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	payment_error	
<input type="checkbox"/>	9	On backorder		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	outofstock	
<input type="checkbox"/>	10	Awaiting bank wire payment		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	bankwire	
<input type="checkbox"/>	11	Awaiting PayPal payment		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	12	Payment remotely accepted		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

[Delete selection](#)

You can of course create a new status with the "Add New" button. Fill out the form, and save it.

**Order statuses**

**Status name:**  \*   
Order status (e.g., 'Pending')

**Icon:**    
Upload an icon from your computer (File type: .gif, suggested size: 16x16)

**Color:**    
Status will be highlighted in this color. HTML colors only (e.g., "lightblue", "#CC6600")

Consider the associated order as validated

Allow customer to download and view PDF version of invoice

Hide this state in order for customer

Send e-mail to customer when order is changed to this status

\* Required field

The color will be used to underline order statuses and will be written, like the previously seen color attributes, in HTML code.

**John DOE - Order #000001**

 View invoice -  View delivery slip -  Print page

<b>2011-06-09 16:50:48</b>	 <b>Delivered</b>	<b>(X. Borderie)</b>
2011-06-01 15:33:15	 Awaiting cheque payment	

Delivered

**Customer**

**John DOE** (#  
 (pub@prestashop.com))

Account registered on 2011-06-01 15:33:15  
 Valid orders placed: 1  
 Total paid since creation: 0.00 €

- Delivered
- Awaiting bank wire payment
- Awaiting cheque payment
- Awaiting PayPal payment
- Canceled
- On backorder
- Payment accepted
- Payment error
- Payment remotely accepted
- Preparation in progress
- Refund
- Shipped

**Pre-written messages**

When you have to send a message to your customers using the PrestaShop administrative interface, you can choose to save this message in order to send it out again to other customers with similar questions, comments, or concerns.

To do this, go to the "Order Messages" sub-tab under the "Orders" tab. One default message is already saved: "Delay". To add others, click on the "Add New" button. You can also edit the default message.

**Order messages**

**Name:** Delay \* 

**Message:** Hi,   
Unfortunately, an item on your order is currently out of stock. This may cause a slight delay in delivery. Please accept our apologies and rest assured that we are working hard to rectify this.  
Best regards, 

**Save**

\* Required fields

- In the "Name" field, give your message a descriptive name so that you can easily find it again later.
- In the "Message" field, write out the content that you wish to send to your customers.

Once done, click on "Save".

You can create as many messages as you want.

You can send these messages by going directly into a customer's order:

- Select the pre-written message.
- Edit it if needed.
- Click "Send."

Your customer will receive the message on the email address associated with this account.

## Delivery Slips

Printing a delivery slip is exactly like printing an invoice. Select the dates, as well as the options you would like, and then confirm them to create your documents.

## Print PDF delivery slips

Please select a date range, this one applies to the order's delivery date:

**From:**  \*

Format: 2007-12-31 (inclusive)

**To:**  \*

Format: 2008-12-31 (inclusive)

\* Required fields

You can also set the delivery prefix, as well number of the next slip in your series.

## Delivery slips options

### Delivery slips options

**Delivery prefix:**  

Prefix used for delivery slips

**Delivery number:**

The next delivery slip will begin with this number, and then increase with each additional slip

## Merchandise Returns

Under the "Merchandise Returns" tab, you have the possibility of allowing customers to send products back to you.

Click on the tab and a form will appear. Select your choice, the time of validity, and save.

## Merchandise return (RMA) options

### Merchandise return (RMA) options

**Enable returns:**  Yes  No

Select whether or not to activate merchandise return for your shop

**Time limit of validity:**

Number of days the customer can make a return after the delivery date

Once you have activated this option in your Back Office, the customer can choose to return an item. In order to do this, he must do the following:

1. Access the Orders History section of his account.

2. Select the order from which he wants to return an item.
3. Select the product(s) that he wishes to return by checking the box next to its name(s).
4. (optional) Add an explanation, in order for the store to understand why the item is being returned.

Once the form is complete, the customer clicks on "Make an RMA slip", and the request is sent to you.

<input type="checkbox"/>	Reference	Product	Quantity	Unit price	Total price
<input type="checkbox"/>	--	iPod touch - Capacité: 32Go	1	469,00 €	469,00 €
<input checked="" type="checkbox"/>	--	Écouteurs à isolation sonore Shure SE210	<input type="text" value="1"/>	149,00 €	149,00 €
Total products (tax incl.):					<b>618,00 €</b>
Total shipping (tax incl.):					<b>7,98 €</b>
Total:					<b>625,98 €</b>

**Merchandise return**

If you wish to return one or more products, please mark the corresponding boxes and provide an explanation for the return. Then click the button below.

A list of returns will appear in your Back Office.

Page 1 / 1 | Display  / 1 result(s)

ID	Order ID	Status	Date issued
▼▲	▼▲	▼▲	▼▲
<input type="text"/>	<input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>
1	#000001	Waiting for confirmation	2011-06-09 17:07:00

- Click on the name of the return to see more details.
- Change the status to continue with the return process.

**Return Merchandise Authorization (RMA)**

**Customer:** John DOE  
View details on customer page

**Order:** Order #000001 from 09-06-2011  
View details on order page

**Customer explanation:** I cannot get it to work.

**Status:** Waiting for confirmation

**Products:**

Product name	Quantity	Action
...rs à isolation sonore Shure SE210	1	

List of products in return package

[Save](#)

## Credit Slip

Once a package has been returned, you **must** create a credit slip.

To display more details, go to your list of orders and click on the order for which the customer is returning the item.

ck	Total *	Return
0	469,00 €	<input type="checkbox"/> 0/1
1	149,00 €	<input checked="" type="checkbox"/> 1 0/1

Re-stock products  
 Generate a credit slip  
 Generate a voucher  
 Repay shipping costs

[Return products](#)

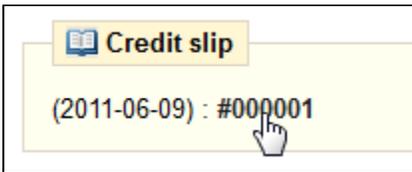
Below the "Products" table, do the following:

- Check the item(s) returned.
- Check the box "Re-stock Products" if you wish to put the product back in your stock.
- Check the box "Generate a Credit Slip."
- To make a customer happy after committing an error in their order, consider giving him a voucher by checking the box next to "Generate a Voucher."

- You can also reimburse his shipping costs by clicking next to "Include Shipping."

Once you have selected all the options you want, confirm by clicking on "Refund Products."

The credit slip is now created and will be available in the Order Details well as in the "Credit Slips" tab.

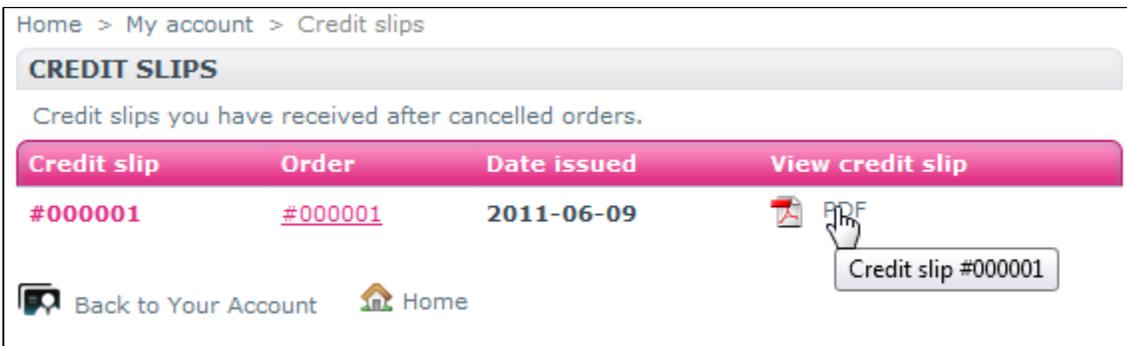


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ID	Order ID	Status	Date issued
1	#000001	Package received	2011-06-09 17:07:00

You can click the link to download the PDF.

Your customer will see the slip in his "My Account" section.



If you have created a voucher, they will see it in the "My vouchers" section of their account. If they click on it, it should look something like this:

Home > My account > My Vouchers

**MY VOUCHERS**

Code	Description	Quantity	Value*	Minimum	Cumulative	Expiration date
V1C101	Credit Slip concerning the order #1	1	156,98 €	156,98 €		2012-06-08

\*Tax included

The amount of the returned item(s) is added to the voucher. The customer can use the discount code (listed in the far left of the column) next time he places an order.

## Messaging Customers

Your PrestaShop online store gives you the ability to interact with your customers thanks to an integrated messaging system.

Basically, your customers can send you messages about their orders through the "My Orders" section of their user accounts. They select the order they want to write about, and then fill out the following.

**Add a message:**  
If you would like to add a comment about your order, please write it below.

Please make sure it arrives on time, it's for my wife's birthday!

**Send**

Once the message has been sent by the customer, it will appear directly under the "Customer Messages" sub-tab, in the "Orders" tab.

Page 1 / 1 | Display 50 / 1 result(s) Reset Filter

Order ID	Customer ID	Customer	Last message	Unread message(s)	Number of messages
1	1	J. DOE	Please make sure it arrives on time, it's for my wife's birthday!	1	1

Clicking on the message's row takes you to the order that it concerns. You can see the message from this point in the bottom left of the page: it is highlighted in yellow.

 **New message**

[Click here to add a comment or send a message to the customer](#)

 **Messages**

 At 2011-06-09 17:49:23 from **John DOE**  
Please make sure it arrives on time, it's for my wife's birthday!

When you read a message, please click on the green check.

Click on the green checkmark to signal that you have read and understood the message.

Take a moment to send a message back to your customer! You can do this by clicking on the "New message" section, which can be found right above, and which has already been discussed.

## PDF settings

The last sub-tab of the "Orders" tab gives you access to the basic settings of the PDF files that PrestaShop will generate. Two settings are available: encoding and font. Only change these if your PDF files are not generated properly.

 **PDF settings for the current language: English (English)**

**Encoding:**     
Encoding for PDF invoice

**Font:**     
Font for PDF invoice

[Save](#)