Sales Orders

Manage your Sales Orders here

- Sales Orders (List)
  - Summary
  - Processing Orders
  - Filtering Sales Orders
- Sales Orders (Detail)
  - Summary
  - Order Number
  - Order Status
  - Order Details
  - Process Payments
  - Status Management
  - Invoice
  - Existing Payments
  - Customer Details
  - Delivery Information
  - Order Products
  - Process Order Lines
  - Discount Management
  - Delivery Management
  - Loyalty
  - Apply Delivery
  - Apply Discounts
  - Balance
  - Order Notes
  - Audit History

    - Quick Access Buttons
    - FAQs

- Processing an Exchange

Sales Orders (List)

A summary page of your Sales Orders

Summary

This screen portrays a summary or your Sales Orders. It can be used to search for a specific Sales Order, observe a filtered view of your Sales Orders, or process them.

You can search for a Sales Order by Customer, Product or by Sales Order Number.

> By default, this screen with show 'active' Sales Orders, which are those that require action.

Filters

You can filter this screen by:

- Search
- Status
- Store User
- Channel
- Supplier
- Fulfilment Store
- Delivery Type
- Date (default is sales order date, optionally by delivery date)
- Sales Orders with notes
- Sales Orders with outstnading balance

Key to icons

draft = draft

abandoned = abandoned

on order = on order

awaiting approval = awaiting action

payment pending = payment pending

refund pending = payment pending

awaiting despatch = awaiting despatch

partially despatched = partially despatched

cancelled = cancelled

completed = completed

partially returned = partially returned

returned = returned

quote = quote

notes = order has notes

notes = Collection

Sales Order Export

It is also possible to export a CSV of your Sales Orders.

The Sales Orders exported will be from your currently filtered view.

Processing Orders

You can process multiple orders simultaneously from this screen.

You can choose to:

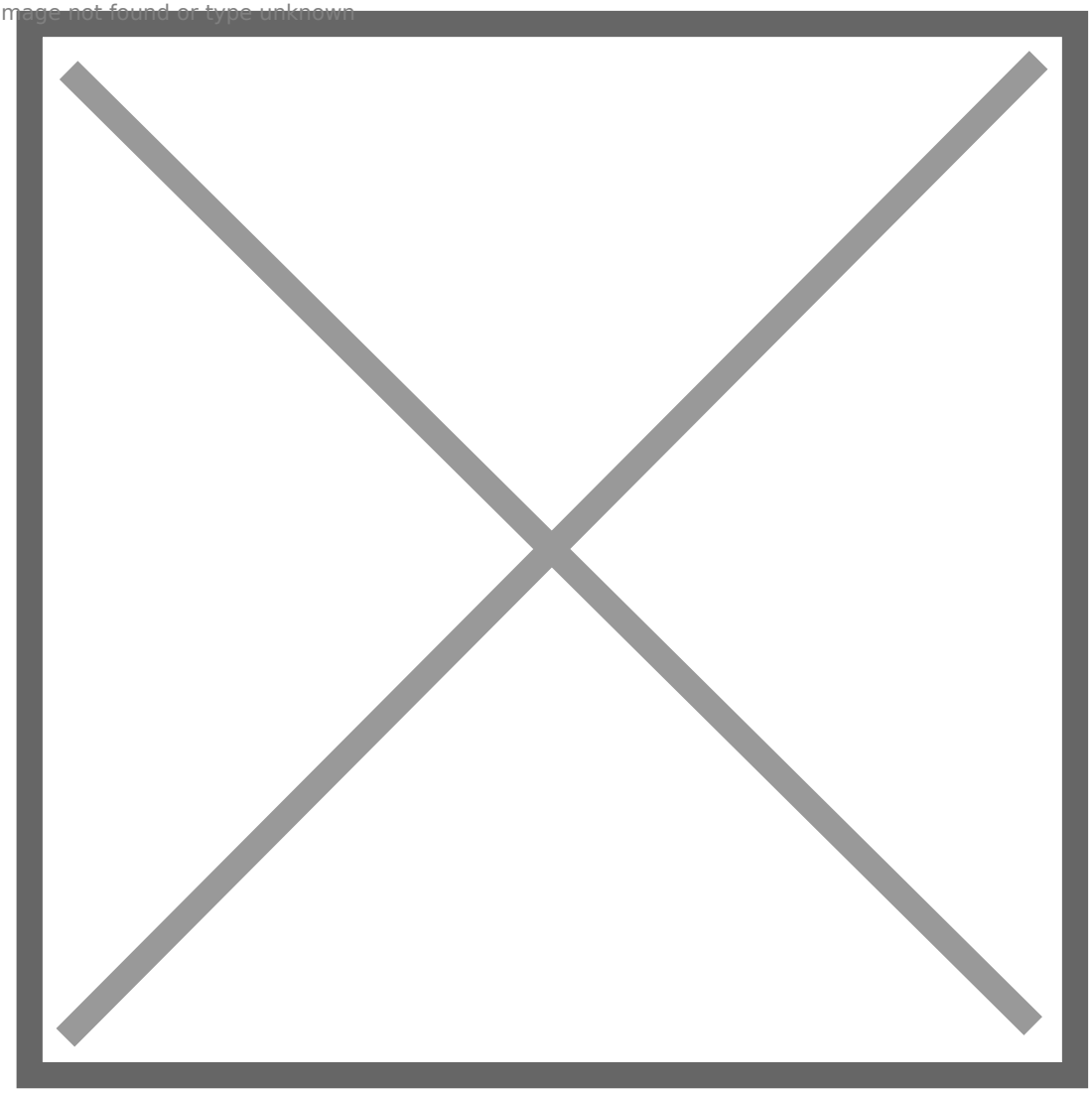
1. Print Picking Lists
2. Print Invoices
3. Print Shipping Labels
4. Despatch Sales Orders
5. Add Notes (the same note to multiple Sales Orders)

> This can send the multiple emails to multiple customers simultaneously

Instructions

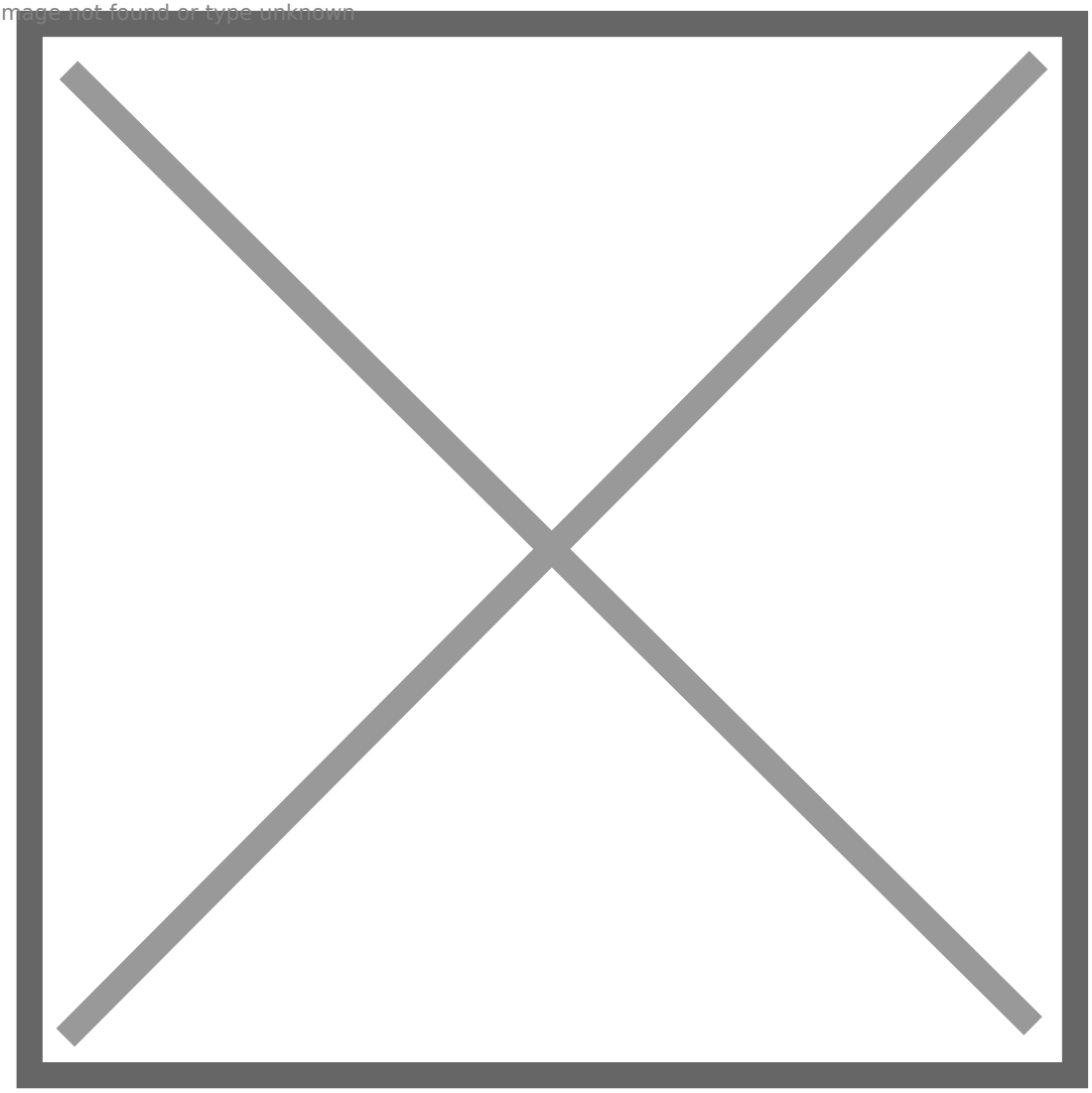
1. Select the Sales Order you wish to process

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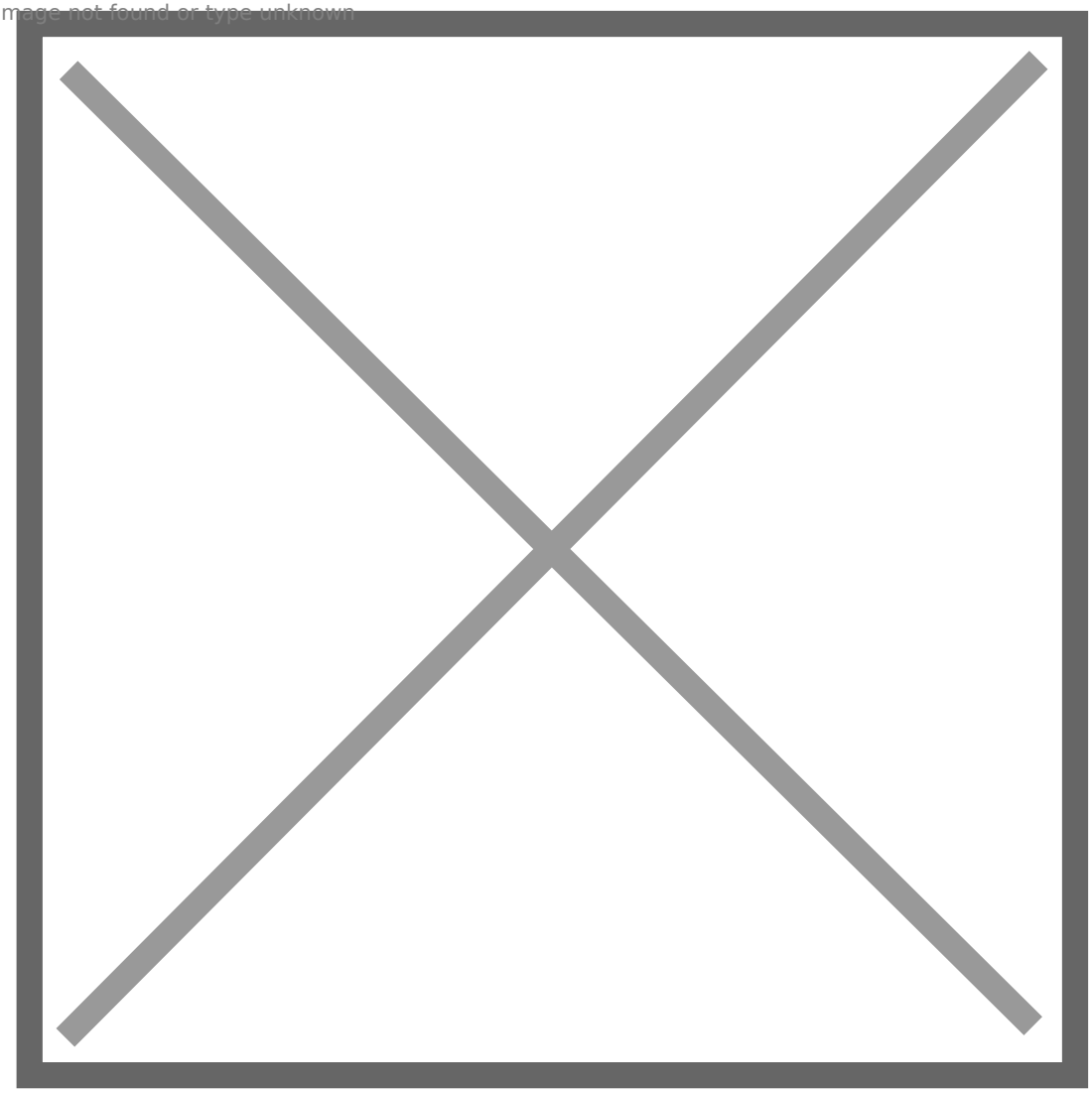
2. Click here

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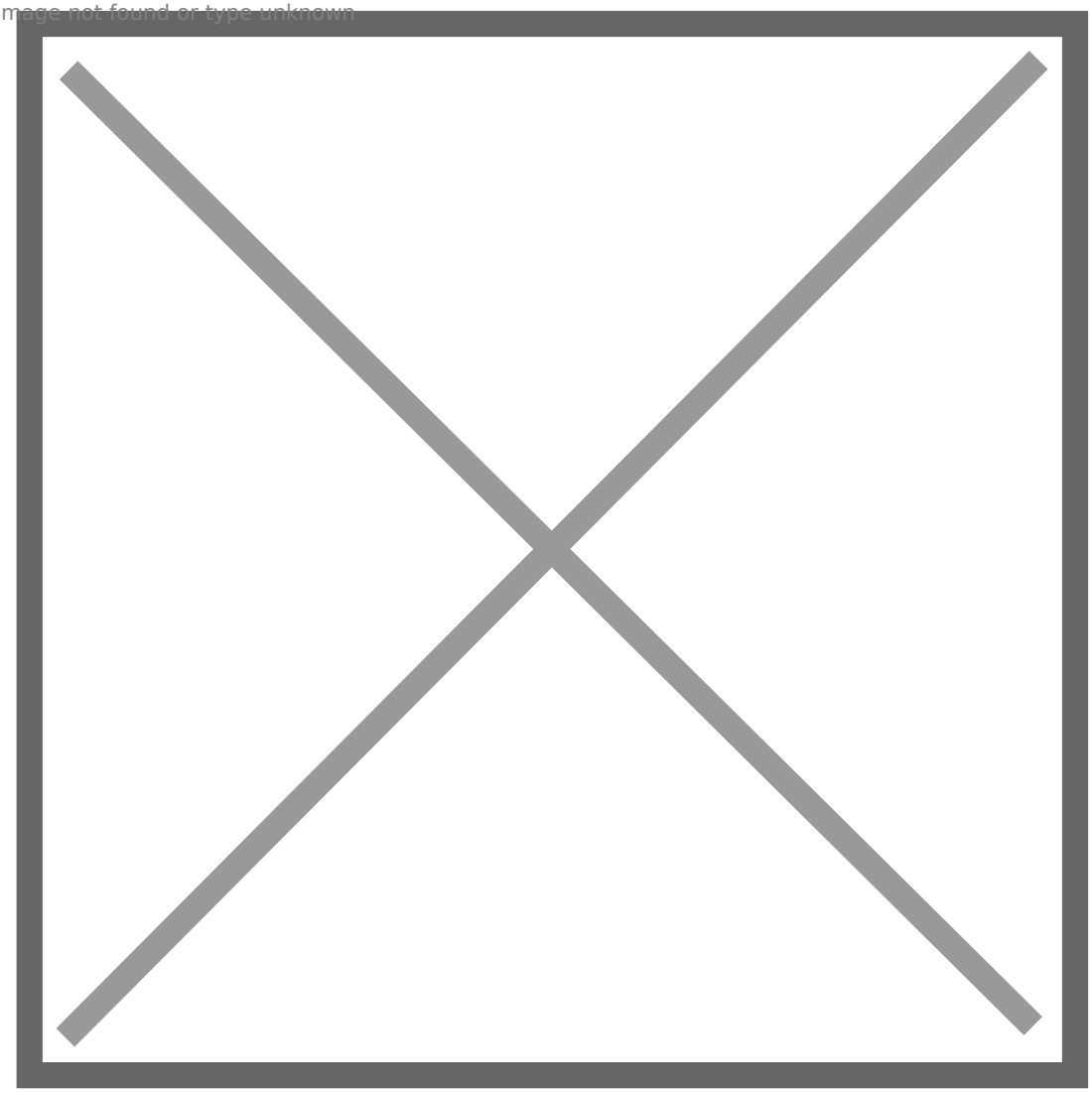
3. Click the button you require

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4. Click to confirm

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Filtering Sales Orders

Use this screen to find similar orders. You can filter by a variety of fields, including:

Field	Purpose
Search	*Search for a Sales Order number, a customer name or a post code*
Status	*Choose from:* • *ACTIVE* • *ALL* • *Draft* • *Payment Pending* • *Unallocated* • *On Order* • *On Transfer* • *Awaiting Action* • *Awaiting Packing* • *Awaiting Despatch* • *Awaiting Collection* • *Despatched* • *Returned* • *Completed* • *Cancelled* • *Abandoned* • *Active Quotes* • *Expired Quotes*
Store User	*Filter by the salesperon linked to the Sales Order*
Channel	*This can be used to either filter by sales channel, e.g. Website, eBay, Phone, etc., or by Store*
Supplier	*This can be used to filter for Sales Orders which contain at least one Product linked to the selected Supplier*
Fulfilment Store	*Filter by the Fulfilment Store*
Delivery	*Filter by Delivery Type*
Date Range	*By default, this will allow you to filter by the order date (default) or by delivery date if you toggle 'Use Delivery Dates'*
Use Delivery Dates	*Allows you to toggle the date filter by delivery date*
With notes	*Filters to show only orders with notes*
With balance	*Filters to only show orders with outstanding balances*

Sales Orders (Detail)

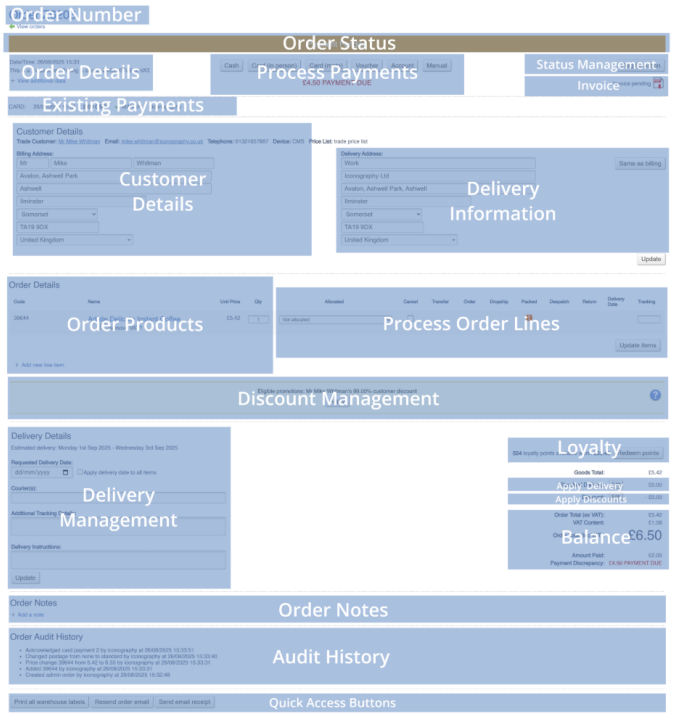
Summary

The Sales Order Detail page displays all of the information relevant to the Sales Order, allows the user to process it, add notes, manage payments, etc.

Page Breakdown

This is one of the most complex pages within IXO Commerce. Below is a breakdown of the key sections.

- Order Number
- Order Status
- Order Details
- Process Payments
- Status Management
- Invoice
- Existing Payments
- Customer Details
- Delivery Information
- Order Products
- Process Order Lines
- Discount Management
- Delivery Management
- Loyalty
- Apply Delivery
- Apply Discounts
- Balance
- Order Notes
- Audit History
- Quick Access Buttons

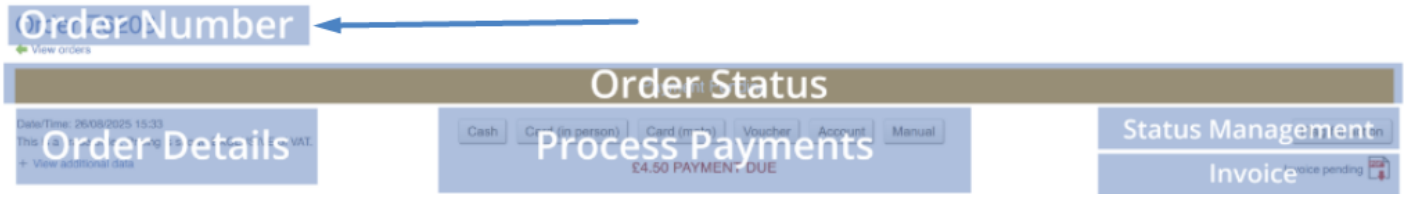


FAQs

Is it possible to cancel a payment, e.g. if a user has entered it incorrectly, or in error?

A Superuser can cancel a payment on the same day it was added to the system. See here for more information.

Order Number



The Sales Order number is a sequential number.

This is automated.

Order Status



The Order Status is set automatically based on a variety of things within the Sales Order.

> These can be used to filter the list of Sales Orders.

A List of Statuses

> These statuses have an impact on the function of the system. For example, it may be impossible to Pack or Despatch a Sales Order which is Payment Pending, or process a return for an Abandoned Sales Order.

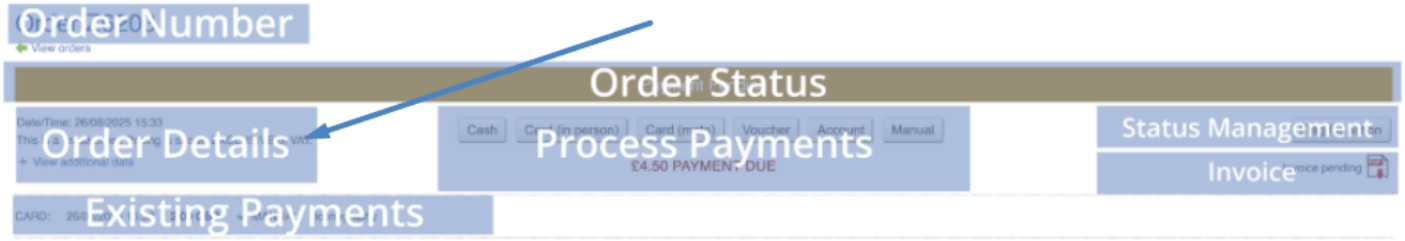
Status	Purpose
Draft	*This implies that an order is still being created or edited and is not yet active.*
Payment Pending	*This flags an outstanding balance on an order.*
Unallocated	*This flags that no stock has yet been allocated to the Sales Order* > *Unallocated orders may be auto-allocated, and will appear on the Required Orders screen*
On Order	*This will be set if at least on line on the Sales Order is allocated to an active Purchase Order*

Status	Purpose
On Transfer	*This will be set if at least on line on the Sales Order is allocated to an active Stock Transfer*
Awaiting Packing	*Set if all items are allocated to Stock Locations with free stock, which are also enabled for fulfilment*
Awaiting Despatch	*Set if all items are marked as Packed*
Awaiting Collection	*Set if all items are marked as Packed and the delivery type is 'Collect'*
Partially Despatched	*Set if at least one order line has been marked as Despatched*
Partially Collected	*Set if at least one order line has been marked as Collected*
Completed	*Set if all order lines have been marked as Despatched/Collected, and there is no outstanding payment* *May be overridden by Awaiting Action*
Awaiting Action	*This will be set if there is a problem with the Sale Order* *Some potential reasons include (but are not limited to):* • *Manual interaction* • *Outstanding balance after delivery* • *Integration problems* *It may be set and must be cleared manually*
Refund Pending	*Set if a refund needs to be paid to the customer*
Returned	*Set if all line items have been Returned*
Partially Returned	*Set if at least one line item has been Returned*
Cancelled	*Set if all lines have been Cancelled prior to delivery* *Alternatively, set if an eCommerce customer clicks 'pay', and then actively choose to cancel within the payment gateway; in this instance, a cancelled payment will be logged against the Sales Order*
Abandoned	*An Abandoned Sales Order is created when the eCommerce customer clicks 'pay', but fails to complete payment within the payment gateway*

Status	Purpose
Quote	*Created by a User within IXO Commerce, typically within the POS*

> Occasionally it may be possible for a Sales Order to fall into multiple statuses (e.g. one order line is On Order and another is On Transfer); because each Sales Order can only have a single status, IXO Commerce will prioritise the most important.

Order Details

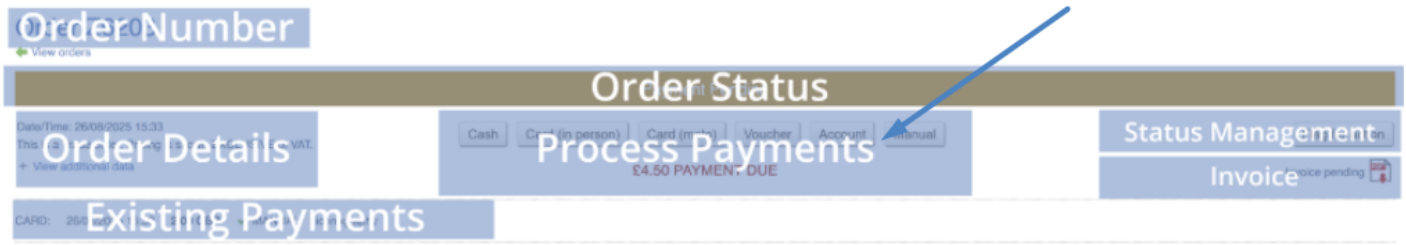


This section shows key information about the Sales Order, including:

Field	Purpose
Date/Time	*Date and time the Sales Order was created*
Order Type	*Retail or Trade*
VAT Type	*How VAT should be applied to pricing (inclusive/exclusive)*
Source	*Sources include:* • *{website}* • *Phone* • *Store* • *Retail/Trade* • *Quote* • *{marketplace}* > *There could be multiple Stores and Marketplaces*
Store	*The selling store (if applicable)*
Created by	*The User who created the order (if applicable)*
Campaign Code	*Marketing campaign code; this may be set manually in the POS, or automatically from Google Ads campaigns for eCommerce Sales Orders*
Mark as High Priority	*Use this to prioritise this Sales Order in Stock Allocation from Purchase Orders*

Field	Purpose
Mark as acknowledged	*This will show whether a third party system has acknowledged the Sales Order; uncheck this to return the Sales Order to the feed* > *Only required for third party integrations*
Order Margin	*This displays the Sales Order margin (if known)*

Process Payments



Use this section to add Payments to the Sales Order.

Available Payment Types will be visible here.

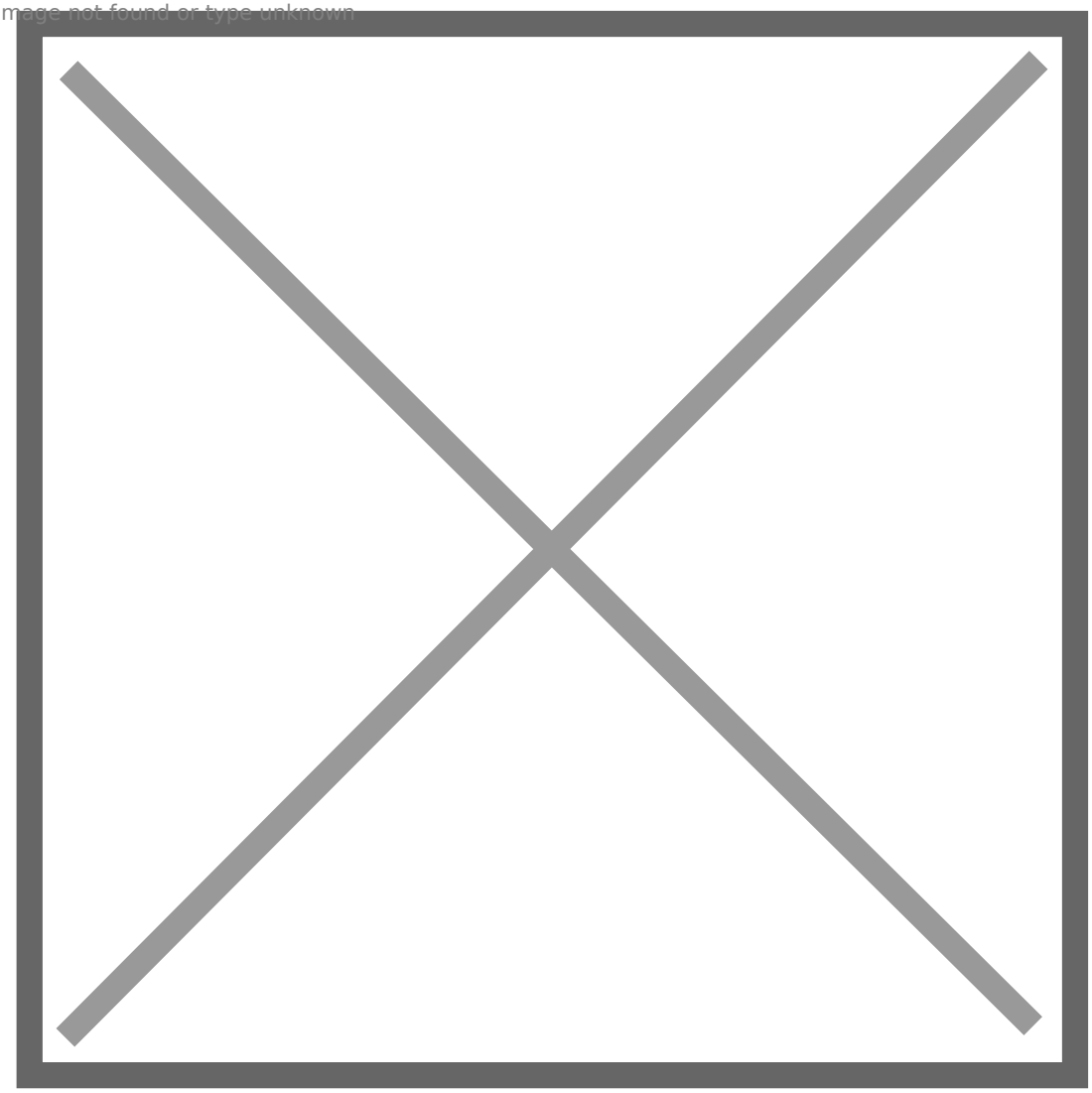
> If you need to finalise a PENDING payment, you will need to manage Existing Payments

How to Add a Payment

> Different payment types may have different payment flows, up to and include virtual terminals

1. Select the payment that you wish to add, and click the relevant button

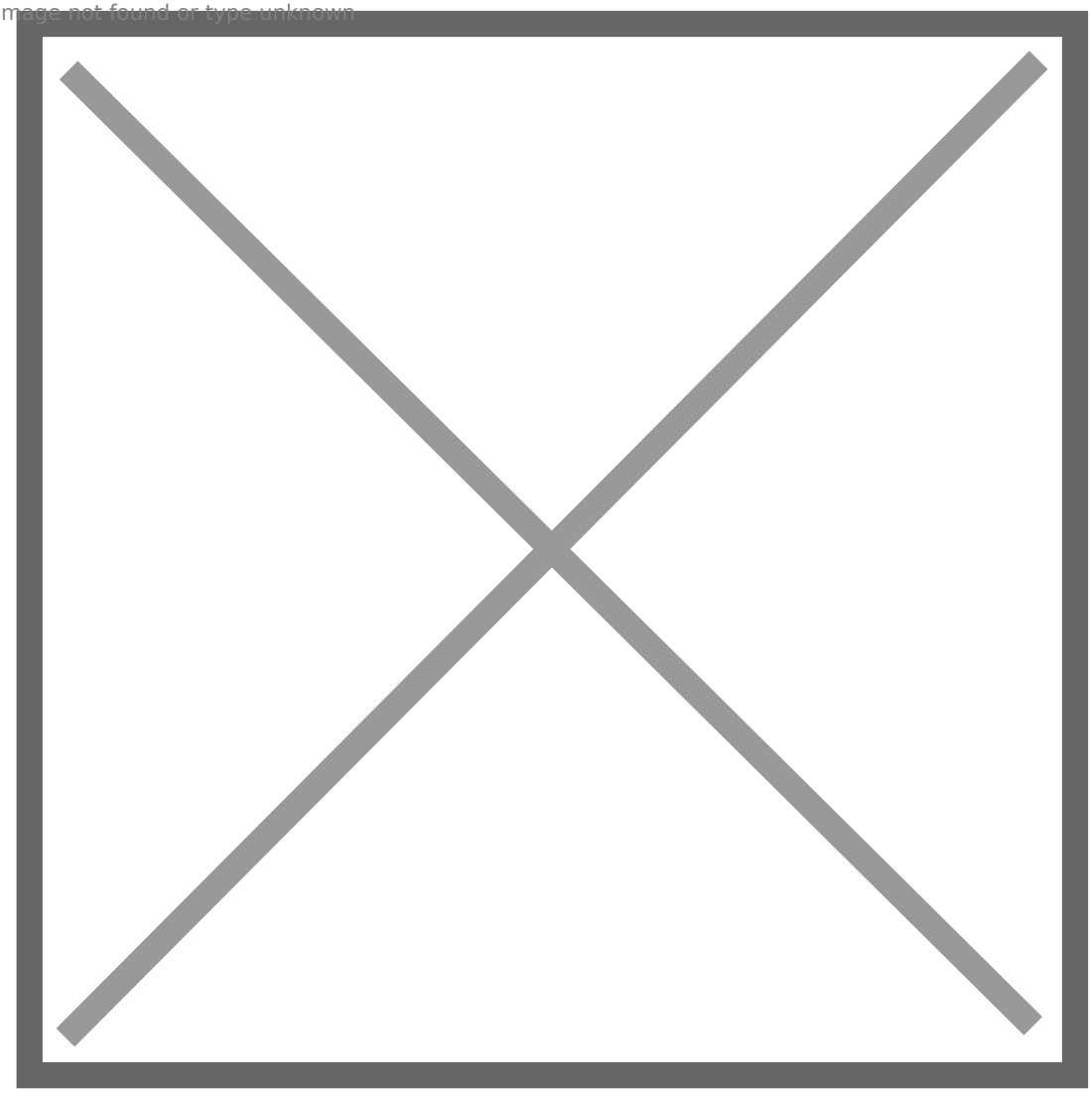
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2. Confirm payment amount (defaults to full amount)

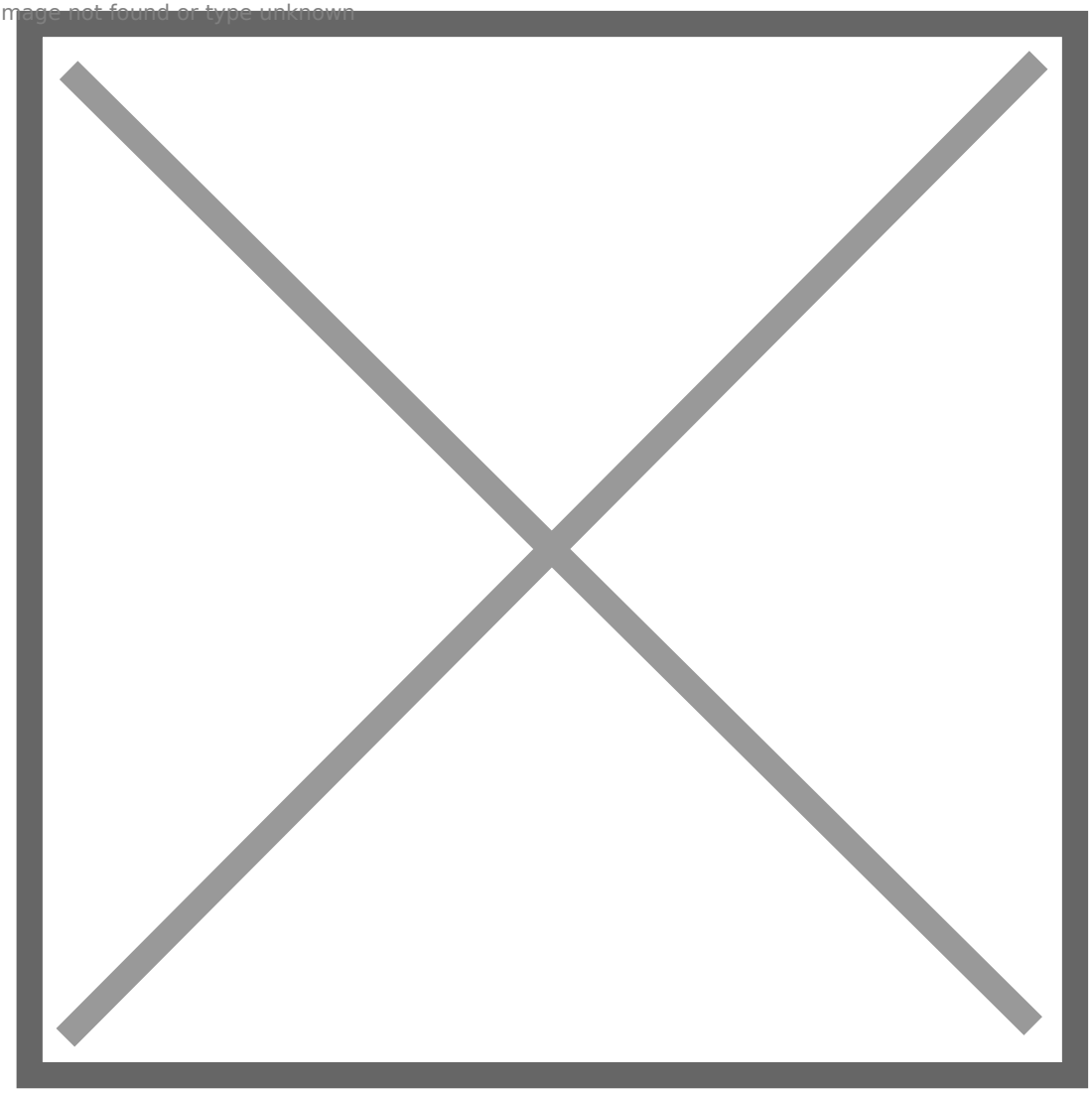
3. For the 'Manual' payment , choose a payment type from the drop down

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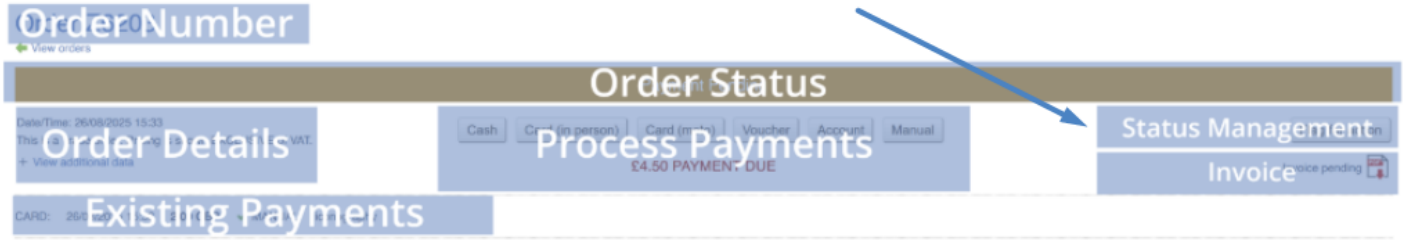
4. Enter a reference if required (this will be automated for some payment types)

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5. Click to acknowledge or confirm payment

Status Management

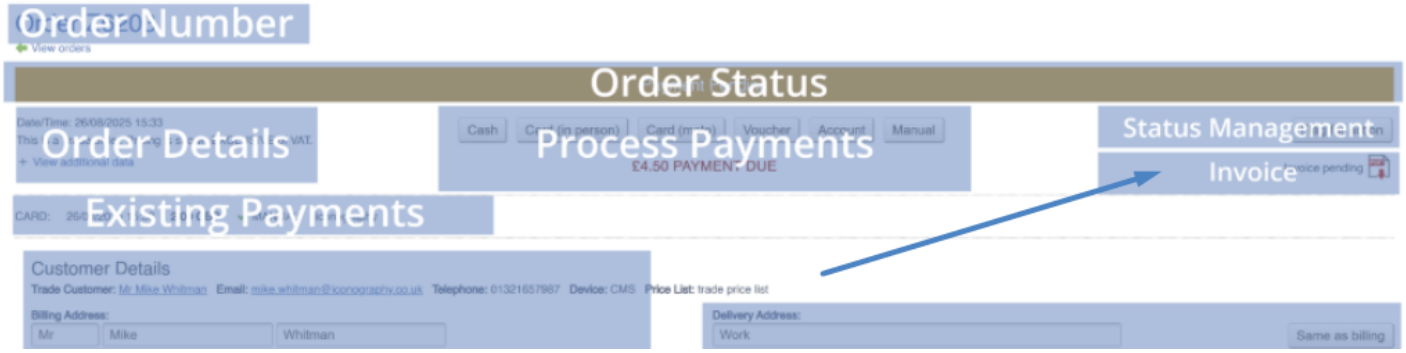


Status management may be used to adjust the status of a Sales Order. It's use is limited as most statuses are automated based on various factors.

Possible Actions

Field	Purpose
Convert to Order	*This will change the status of the Sales Order to Payment Pending* > *It is possible to use this to create a Sales Order without any payment* *This button will only appear on Sales Orders with the Draft and Quote statuses*
Convert to Quote	*This will change the status of the Sales Order to Quote* *This will created a quote reference, but will not automatically email the customer with the Retrieve a Quote email; to send this, use the Quick Access Buttons* *This button will only appear on Sales Orders with the Draft and Abandoned statuses*
Flag for Action	*This will change the order status to Awaiting Action* *This button is always visible*

Invoice



The invoice section allows you to review paperwork for the Sales Order.

> If the document has previously been downloaded, it will be labelled as such

> Although on Sales Orders with the status Quote, this will read 'Quote Pending', the document is almost identical

Existing Payments



A list of existing payments will be shown here, along with any relevant information, including date/timestamps, payment methods and references.

PENDING Payments

Certain payment types (Finance and Other by default) require secondary confirmation; this is because it is expected that although the order is 'paid', further action will be required to complete that payment. This is intended as a flag for manual action outside of IXO Commerce, such as cooling of a finance agreement.

For the purposes of order processing, a Sales Order with a PENDING payment is considered to be paid.

Once the Sales Order has been delivered, its status will be set to Awaiting Action, and a message will be shown:

> This order requires action. Payment requires confirmation.

Use the controls to confirm or cancel finance; this will automatically reset the status.

Refunds

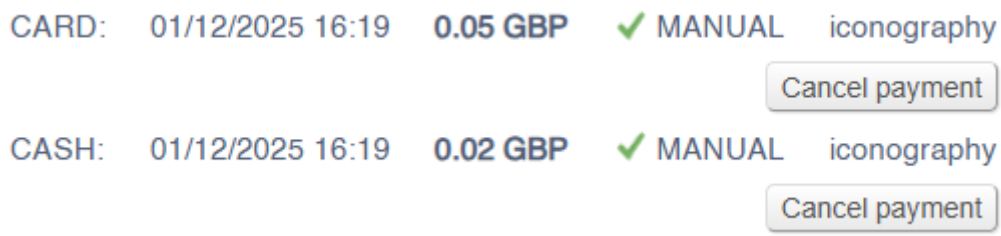
It may be possible to refund payments for certain payment types; this function is available for eCommerce payments processed via the Opayo Pi integration, for example.

Cancelling Payments

> This should only be done to correct errors

Payments may be cancelled by superusers, but only on the same day that they were added. They may not be cancelled at a later date, as this would affect payment reporting, and may enable malicious activity.

In order to cancel a payment, the user must have superuser access rights, and the payment must either be a 'Manual' or 'Cash' payment. To cancel the payment, simply press the relevant button:



This will then alter the Sales Order:



The user is then free to add further payments as required.

> Cancelled payments are discounted from all payment reporting

Customer Details



This section can be used to amend the customer details. Some details can only be edited as part of the Customer record.

> Click on the customer name hyperlink to open the Customer record

Delivery Information



Edit delivery information here.

Same as billing

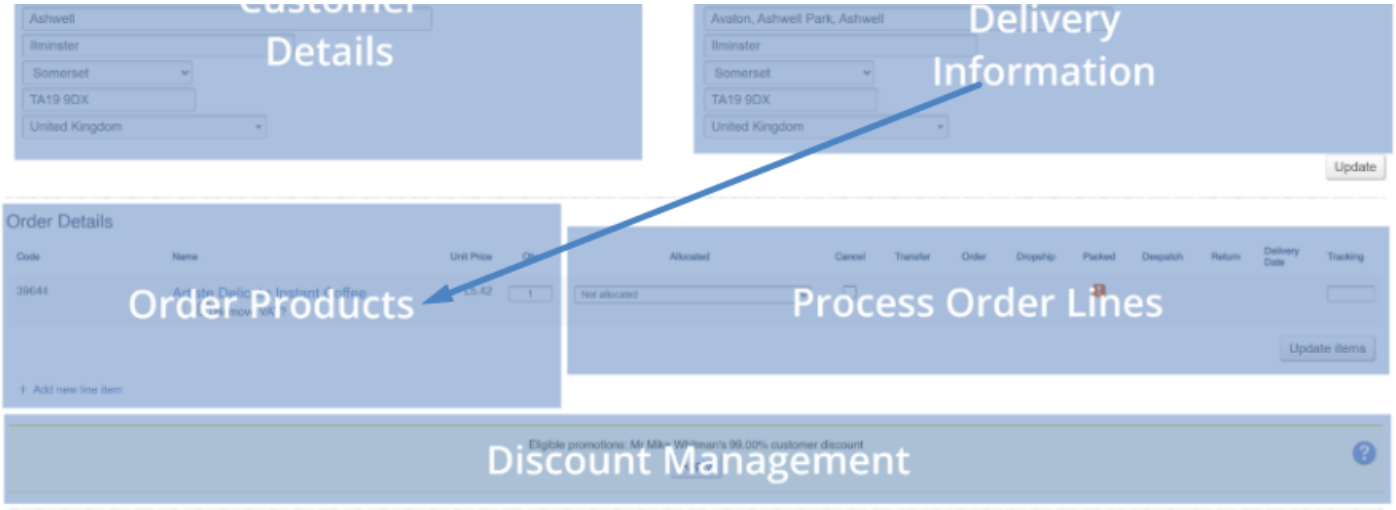
This will copy the billing address to the delivery address.

Collection Store

If the delivery type 'collect' has been selected for this order, you can select a Ccollection Store from the list.

> A Store must be enabled for collection to appear in this list

Order Products



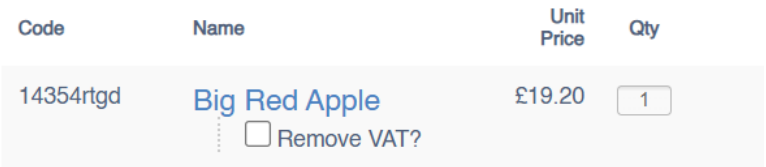
This section will show a list of Order Products, which are separated into individual Sales Order Lines.

Product Types

Different products will display differently, with different information.

Standard Products

These are products without Customisations.

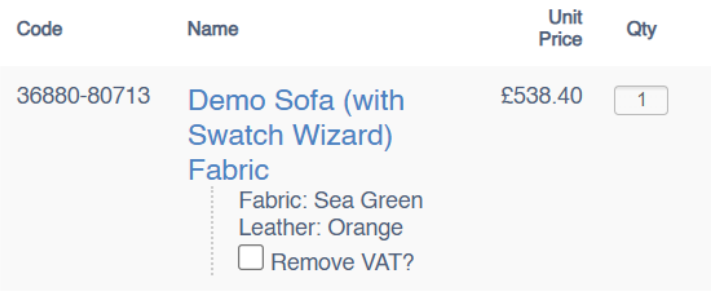


Field	Purpose
Code	*This is the SKU code of the Variant purchased*
Name	*This is the name of the Product purchased*

Field	Purpose
Unit Price	*This is the price of the Product purchased* > *This will show additional detail if order level discounts have been applied, but not if a special offer price is active on the Variant sold*
Quantity	*The quantity of the Variant purchased by the Customer*

Made to Order Products

These are products with Customisations.



Field	Purpose
Code	*This is the SKU code of the Variant purchased*
Name	*This is the name of the Product purchased* *Customisations selected by the Customer are detailed below; these are shown in alphabetical order with additional custom options appended below the ones applied on the Customisation tab*
Unit Price	*This is the price of the Product purchased* > *This will show additional detail if order level discounts have been applied, but not if a special offer price is active on the Variant sold*
Quantity	*The quantity of the Variant purchased by the Customer*

Bundle

These are products set up as Bundles.

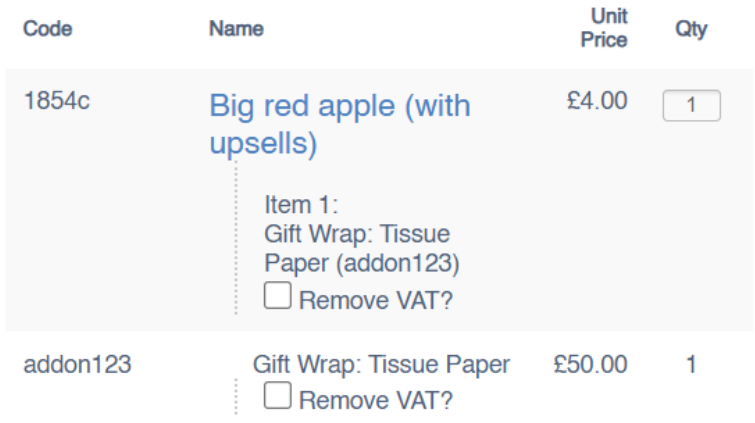


> The contents of a Bundle are displayed below the parent Bundle product; for these, the price and quantity will be greyed out and locked. The prices are for reporting purposes only, designed to show an indicative value assigned to the Bundle components. The quantities are used for fulfilment and stock reservation, as each component may be processed individually.

Field	Purpose
Code	*This is the SKU code of the Variant purchased*
Name	*This is the name of the Product purchased*
Unit Price	*This is the price of the Product purchased* > *This will show additional detail if order level discounts have been applied, but not if a special offer price is active on the Variant sold*
Quantity	*The quantity of the Variant purchased by the Customer*

Addons

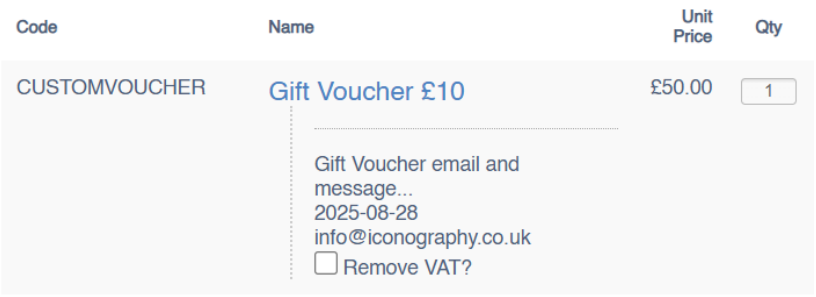
These are shown below linked Sales Order Lines.



> Addons will be displayed on linked items, as well as on their own line; this is to clearly show which Sales Order Lines are linked to which Addons.

Field	Purpose
Code	*This is the SKU code of the Addonpurchased*
Name	*This is the name of the Addon purchased*
Unit Price	*This is the price of the Addon purchased* > *This will show additional detail if order level discounts have been applied, but not if a special offer price is active on the Variant sold*
Quantity	*The quantity of the Addon will always be '1'*

Voucher



> Vouchers are automatically despatched when the order is paid in full.

Field	Purpose
Code	*This is the SKU code of the Variant purchased*
Name	*This is the name of the Product purchased*
Unit Price	*This is the price of the Voucher, either as per the Variant selected, or as per a customer amount for this Sales Order* *Additional information will also show on the Sales Order Line:* • *date sent* • *recipient email address* • *voucher code* • *balance remaining*
Quantity	*The quantity of the Variant purchased by the Customer*

Booking



Field	Purpose
Code	*This is the SKU code of the Variant purchased*
Name	*This is the name of the Product purchased*
Unit Price	*This is the price of the Variant purchased* *Additional information will also show on the Sales Order Line:* • *date of booking* • *time of booking* > *This will show additional detail if order level discounts have been applied, but not if a special offer price is active on the Variant sold*
Quantity	*The quantity of the Variant purchased by the Customer*

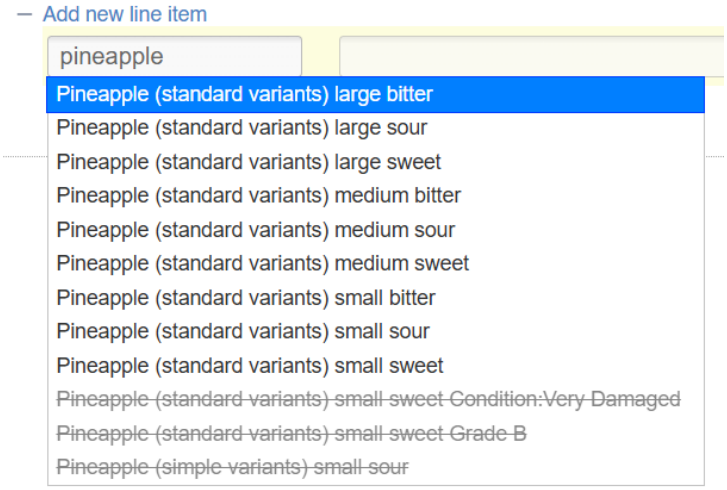
Other Actions

Adding a new line item

You can either search for an existing product or add a custom product to a Sales Order

Existing Product

Search for an existing Product by Name or by Code; you will then be able to make your selection from a list.



Unavailable Unique Stock Records will be displayed greyed out, with a strikethrough. This is to assist reordering.

Custom Product

Simply enter a custom SKU Code which doesn't match anything within your product database. Then add a name and price as required.

Changing quantity ordered

It is only possible to amend the quantity on a Sales Order Line on the day that it was added to the Sales Order. This is to preserve the integrity of reporting.

Removing VAT

Use the tick box to remove VAT from a product.

> A VAT Exemption Form may be added from the Quick Access Buttons

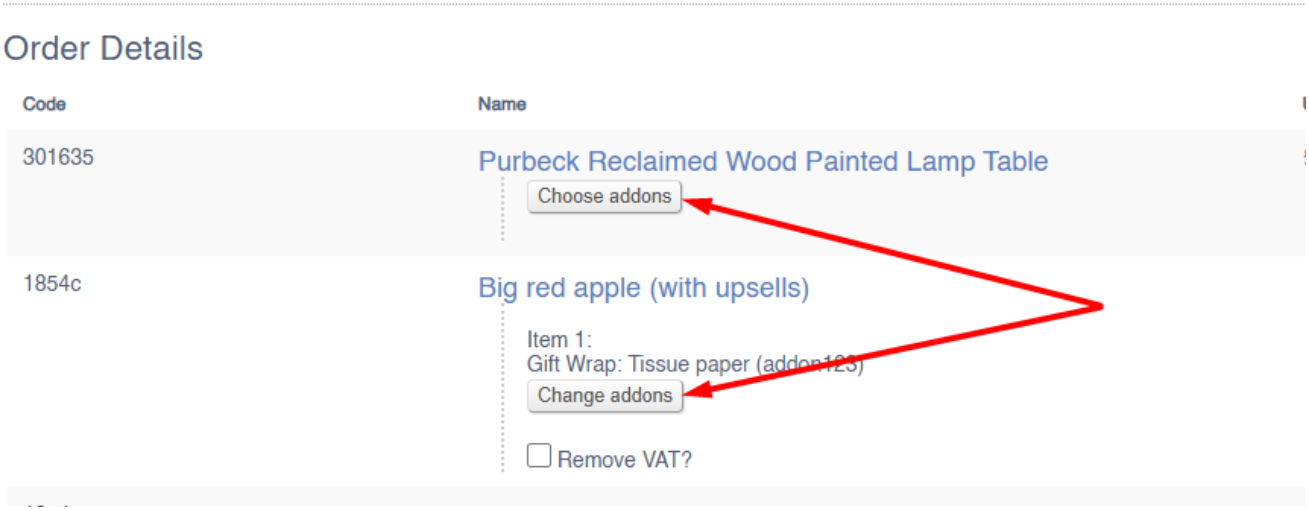
Delete Cancelled Lines

Pressing this button will remove cancelled lines from the Sales Order and all associated paperwork.

These Sales Order Lines are not deleted from the system, and are retained for reporting purposes.

Change/Choose Addons

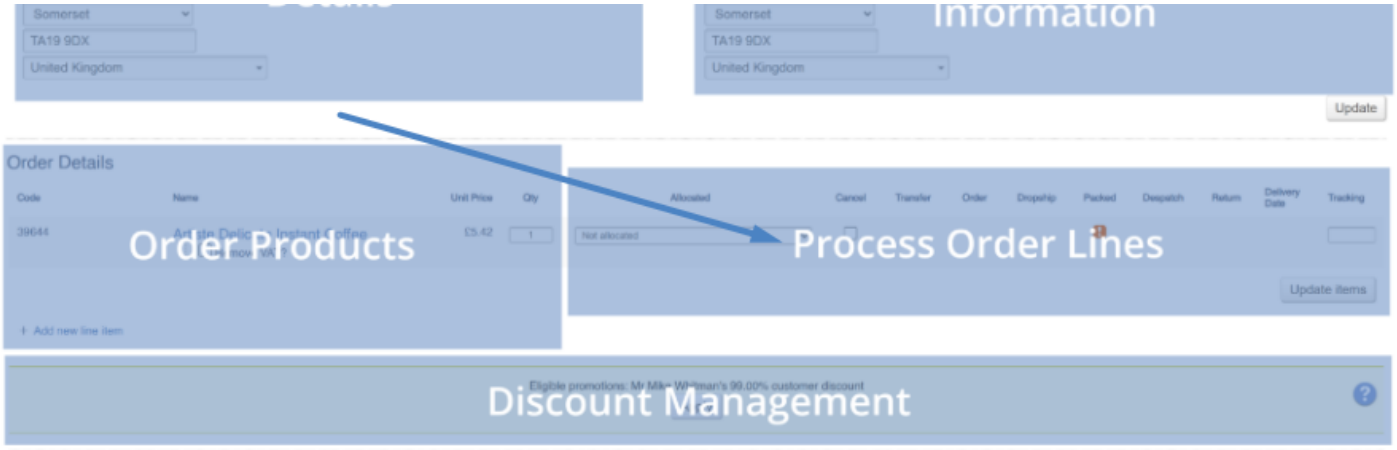
Use this button to change/choose Addons.



Create RMA

Use this option to create an RMA (return merchandise authorisation) to formally process a return.

Process Order Lines



This section is used to manage Sales Order Lines. Actions taken here will affect the Order Status.

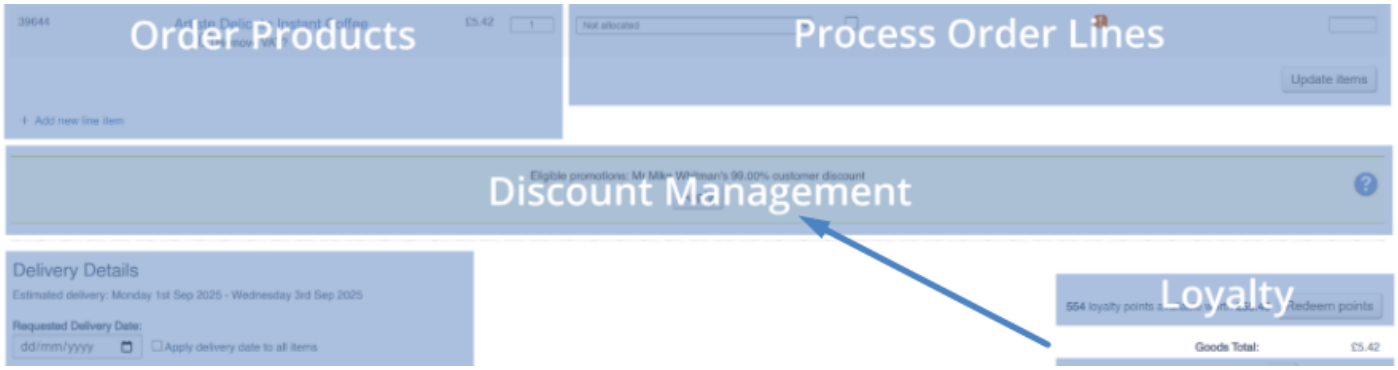
Actions

Field	Purpose
Cancel	*Tick this to cancel the Sales Order Line; you will then be prompted or additional information* • *Quantity to return* > *If you partially cancel a line, this will split the line into two* > *This will only be possible prior to the item being delivered* > *Cancelling all or part of a line will also remove all associated discounts applied at line level; sales order level discounts will not be deleted*

Field	Purpose
Transfer	*Initiate a Transfer* *This will allow you to initiate a Transfer from the allocated Store and Location to one of your choosing* > *This will only display if the allocated Store has 'Enable for web sales fulfilment?' set to 'no'*
Order	*Create a back to back Purchase Order for this Sales Order line* *Ticking this will create a new Purchase Order Line, either as part of an existing Purchase Order, or as a new Purchase Order, depending on whether you have set the Supplier to 'collate purchase orders'* > *This will only display if the Product is linked to a Supplier enabled for Purchase Orders*
Dropship	*Create a drop ship Purchase Order for this Sales Order line* *Ticking this will create a new Purchase Order for delivery to the Customer's delivery address* > *This will only display if the Product is linked to a Supplier enabled for Dropship AND the Sales Order has Delivery applied*
Packed	*Tick this to pack the Sales Order Line* *You will be prompted to confirm the quantity to pack*
Despatch	*Tick this to despatch the Sales Order Line* *You will be prompted to confirm the quantity to despatch; this will default to the number of items which have been packed* *If you partially despatch a line, this will split the line into two*

Field	Purpose
Return	*Tick this to return the Sales Order Line; you will then be prompted or additional information* • *Quantity to return* • *Return reason* • *Location (to which the items should be returned; this will default to the default return location for the Store from which you are currently working)* • *Flag if an exchange is required* • *Create a Supplier Return* > *This will only be possible after the item has been delivered* > *If you partially return a line, this will split the line into two*
Delivery Date	*This will show the requested delivery date, if there is one* *This will be overwritten by the actual delivery date for the Sales Order Line once it is marked as despatched*
Expected Goods In Date	*This will show below the requested delivery date* *This will only show if the Sales Order Line is allocated to a Purchase Order*
Tracking	*Use this to record line specific tracking information* *This will be sent to the customer* > *For order level tracking information, use the Delivery Management section*

Discount Management

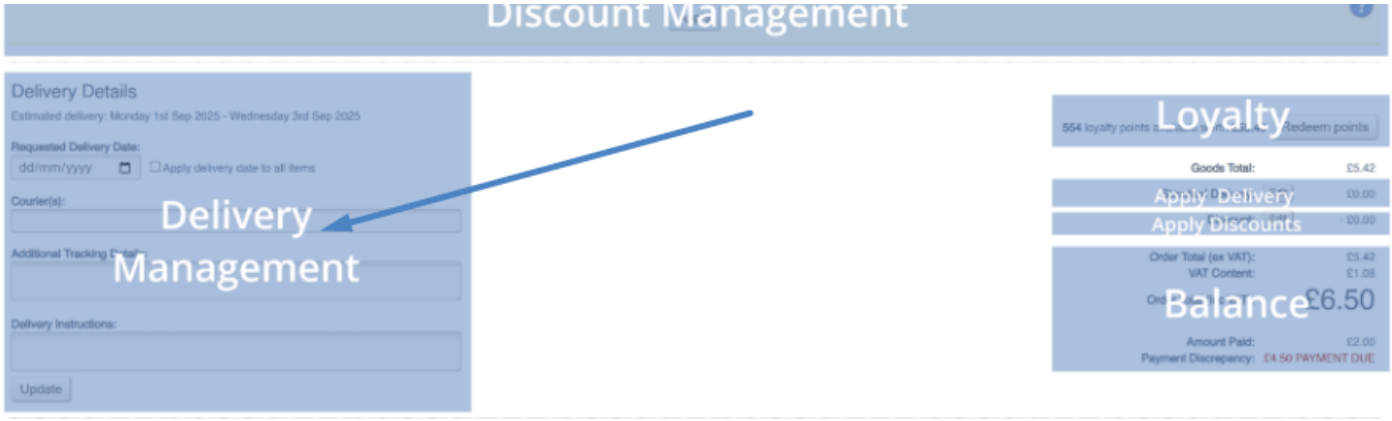


Promotions and manual discounts are displayed and can be managed in this section.

> Discounts will be displayed here only if they have been applied

> Promotions which are live for all customers, e.g. unconditionally, can not be removed.

Delivery Management



Use this to add delivery details to a Sales Order

Field	Purpose
Book Delivery	*This will open a pop up to Schedule the Sales Order for delivery* *See Scheduling for more information*
Requested Delivery Date	*Input a requested delivery date* *This is set at a Sales Order level here, but can also be edited per Sales Order Line*
Apply delivery date to all items	*Tick to show the requested delivery date against individual Sales Order Lines*
Courier(s)	*Enter couriers used for the Sales Order* *This will be sent to the customer* *This may be auto-filled by certain integrations*
Additional Tracking Detail	*Enter tracking numbers used for the Sales Order* *This will be sent to the customer* *This may be auto-filled by certain integrations*
Delivery Instructions	*Use this to amend Delivery Instructions* *These will be output on Sales Order Invoices and Delivery Notes*

FAQs

How do the different delivery dates, estimated dates and estimated arrival dates combine on a Sales Order?

The estimated delivery date within the Delivery Management section is an estimate at Sales Order level. It is based on the lead time of the items, and will automatically update as linked Purchase Orders are managed.

It will always show the date that is furthest away.

Loyalty



This section displays the loyalty points accrued by the customer, their monetary worth, and invites the user to apply that balance to the current Sales Order.

Apply Delivery



Use the controls in this section to add or change the delivery type associated with a Sales Order.

> If a delivery type has been added, you will need to configure a delivery address within the Delivery Information section

> If you select 'Collect' you will also need to select a Collection location (this is visible within the Delivery Information section)

Apply Discounts



Use this button to add a new manual discount to a Sales order.

Promo Code

Enter a valid promo code to apply the relevant discount.

Custom Discount

Field	Purpose
Reason	*Select a reason from the list* *This is reported on in the Discount Report* *The list is controllable via Site Settings*
Apply to	*Choose from:* • *Any single line item* • *The whole Sales Order (this will include Addons, but exclude Delivery)* • *Delivery*

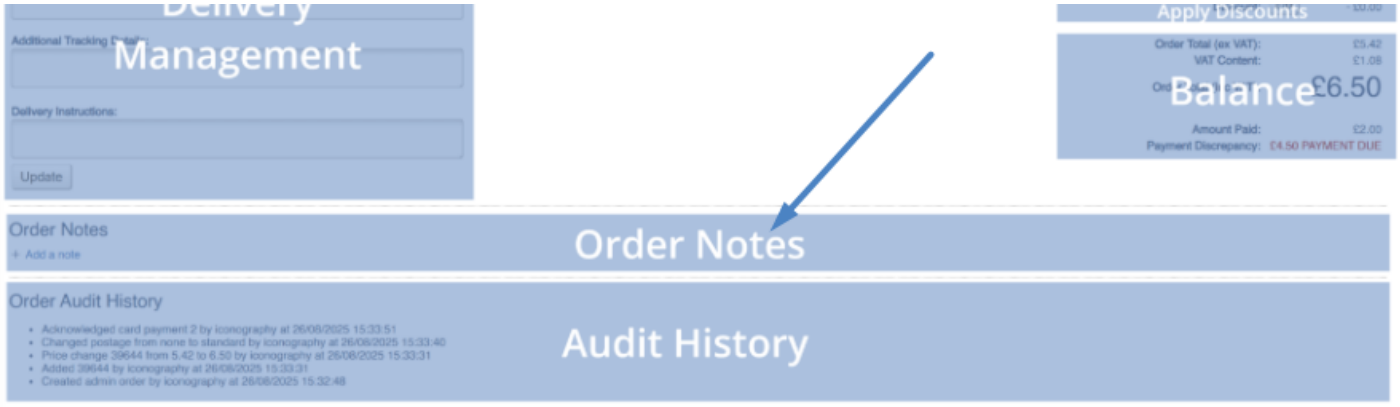
Field	Purpose
Discount Mode	*Choose from:* • *by amount (discount by a fixed amount)* • *by percentage (discount by a percentage* • *set value to amount (set the value of the item to £XXX)*
Value	*Enter the value for the corresponding Discount Mode, e.g. 12% or £100*
Auth	*Enter an Authorisation Pin to approve the Custom Discount* *Only Superusers will have an Authorisation Pin* *Controllable via Update Users*

Balance



This will show a complete breakdown of the Sales Order VAT content, with additional detail on the total amount paid, as well as any Payment Discrepancy.

Order Notes



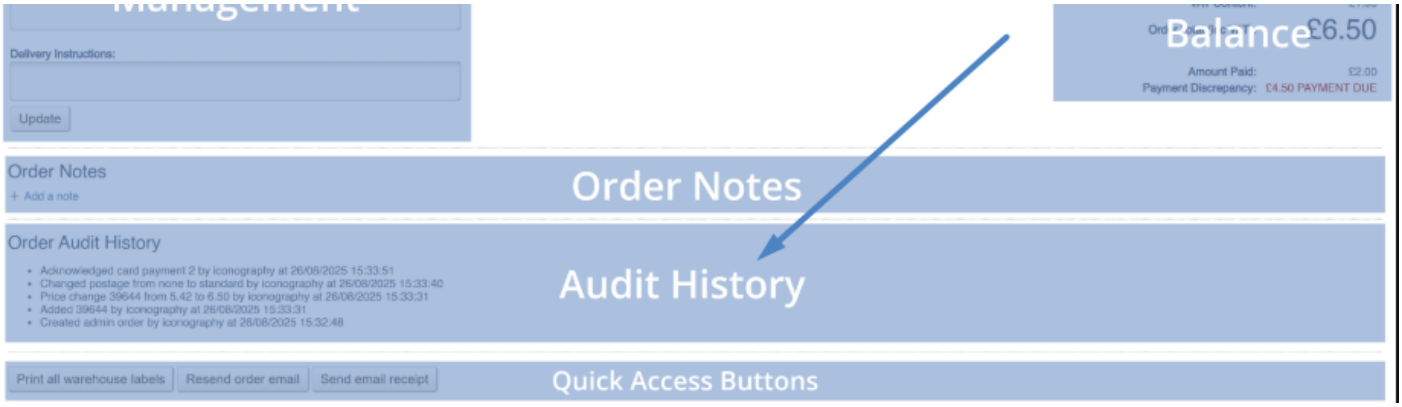
A user may add notes to a Sales Order here.

Use the controls to add a note or a task.

Email to customer

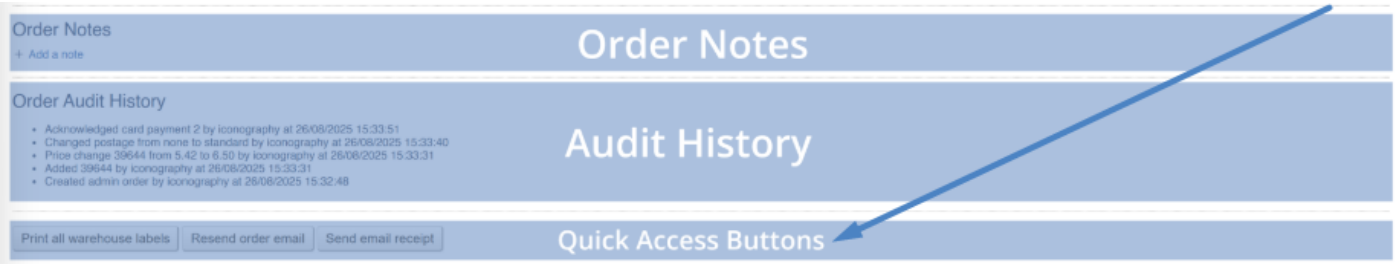
If toggled, this will email the note to the customer, along with any attachments.

Audit History



The audit history shows a log of all actions taken on a Sales Order, along with a timestamp and who took the action.

Quick Access Buttons



Found at the bottom of the page, these buttons allow you to take various quick actions regarding the order:

Button	Purpose
Print all warehouse labels	*Print Warehouse labels for Sales Order Lines* *The print labels button will print out all active sales order lines, e.g. those lines where the allocation drop down is visible* > *This may print many labels, as it will print one for each unit required to fulfil the Sales Order*
(Re)Send order email	*Sends the Sales Order confirmation email*
(Re)Send quote email	*Sends the Quote email*
(Re)Send email receipt	*Sends an email receipt for Store orders* *If no email has been entered against the customer, an input box will display here*
(Re)Send despatch email	*Sends despatch notification*
Create VAT Exemption Form	*Use this to create a VAT Exemption Form for the Sales Order* *Will only show if VAT has been removed from a Sales Order Line*

Button	Purpose
(Re)Send Collection Email	*This will send the customer an email telling them that their order is ready to collection* *This will change the status of the Sales Order to Awaiting Collection*

FAQs

How can I find the profit margin on a Sales Order?

Look in the Order Details section of the Sales Order screen.

How can I add a payment to my Sales Order?

Use the Process Payments section of the Sales Order screen.

Can I edit the quantity on a Sales Order Line?

Yes, but only on the date that line was added to the Sales Order; this is an important restriction to prevent reporting errors.

To change the quantity, either Cancel the line, or add a new one for the same item.

Why can I remove the VAT on a Sales Order Line?

This is intended for use with Products that are not typically VAT exempt, but where a user may wish to remove the VAT on behalf of the customer.

Typically, this would be for mobility products, such as riser/recliner chairs, for customers with a disability.

Use the Order Products section to remove VAT from a Sales Order Line.

See also VAT Exemption Forms.

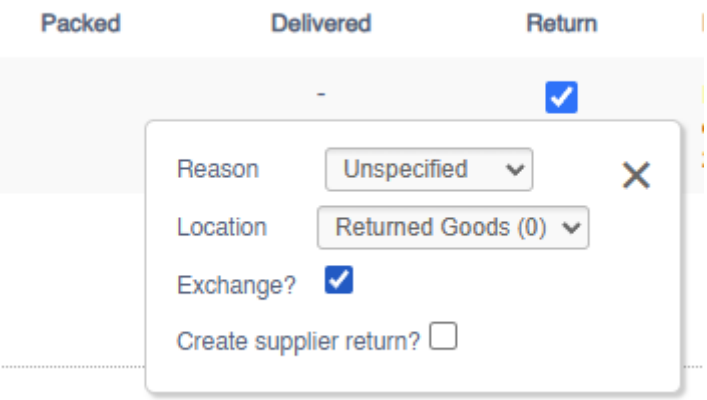
What does 'Stock allocation to resolve' mean?

This indicates that a Sales Order Line has been overallocated. See Stock Allocation for more information.

Processing an Exchange

> This process may only be managed within the full CMS, and not via the POS.

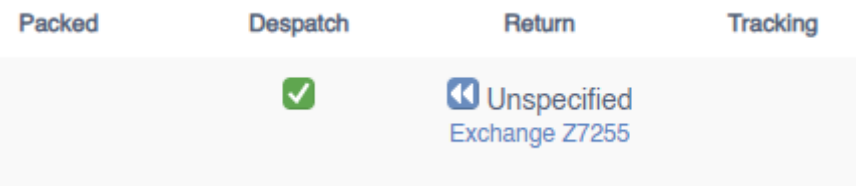
When an item is returned, it may be marked as 'exchange required'.



> The journey is similar if the Return is managed through the RMA process

New Sales Order

Processing a return marked as an exchange will create a new linked Sales Order.

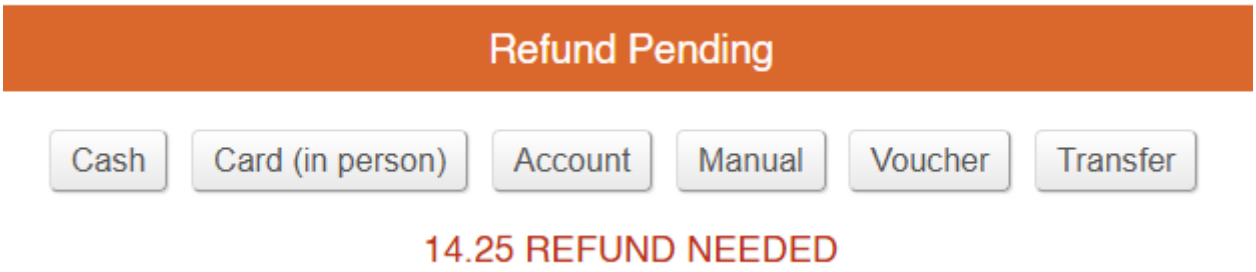


This new Sales Order will be created without any Products and the User will need to add Products accordingly.

Transfer Payment

There will be a payment discrepancy on any Sales Order with a returned line - this will be flagged as Refund Pending.

If the 'Transfer' button is pressed, it will transfer that balance to the linked Sales Order.



This will then display on the new Sales Order as a credit.

