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## CUSTOMERS

Choose **Customers** from the homepage Panel.

This section allows you to:

- Add, view, edit and delete registered customers.
- Add, view, edit and delete orders.
- Email customers directly from within the administration.
- Print: Invoice and Packing Slip.
- Add a New Order for the selected customer.



Above: Customers admin panel screenshot

Customers											First name, last name, email address or order id
Actions	Last Name	First Name	Account Created	Last Login	No. Logins	Telephone	DOB	State	News letter	Admin Notes	Action
View/Edit Orders	Huttunen	Kristi				96266244	20/12/1984	AU, New South Wales, Sydney	✓	✓	↔
View/Edit Orders	Needham	Pete				02 9626 6244	21/12/1970	AU, New South Wales, Sydney	✓	✓	ⓘ
View/Edit Orders	Rowe	Ben	18/07/2007	12/06/2008	4	02 8883 1255	23/01/2007	AU, New South Wales, Kellyville			ⓘ
View/Edit Orders	Testing	Kristi Test	18/06/2008		0	8883 2600	01/01/1990	AU, New South Wales, Bella Vista	✓	✓	ⓘ

Displaying 1 to 4 (of 4 customers) Page 1 of 1

**Kristi Huttunen**

edit

new customer

new order

delete

orders

email

**Customer Notes:**

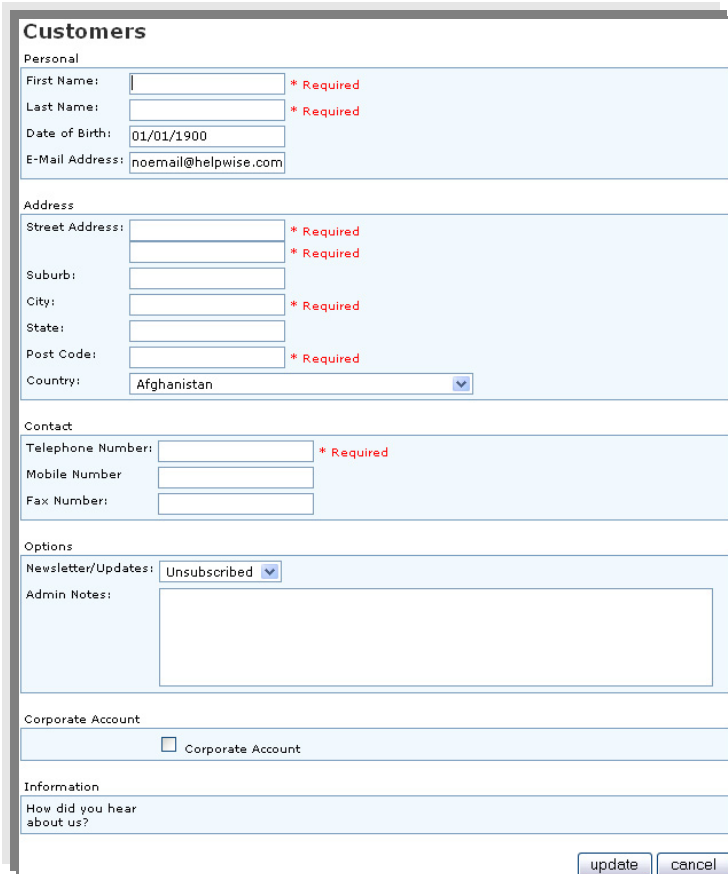
This is a test message!

Above: Customers screenshot

## NEW CUSTOMER

This button allows you to add a new customer to your shop manually.

1. Click the  button. The following will appear:



**Customers**

Personal

First Name:  \* Required

Last Name:  \* Required

Date of Birth:

E-Mail Address:

Address

Street Address:  \* Required

\* Required

Suburb:

City:  \* Required

State:

Post Code:  \* Required

Country:

Contact

Telephone Number:  \* Required

Mobile Number:

Fax Number:

Options

Newsletter/Updates:

Admin Notes:



Corporate Account

Corporate Account

Information

How did you hear about us?

Above: Add new customer screenshot

2. Fill in the information required, and click  to insert the new customer into your database, or  to exit. You will then return to the list of customers screen.

## EDIT

This button will allow you to edit your customer's details. To Edit:

1. Select the Customer you wish to edit from the list, by clicking once to highlight.
2. Click the  button from the right hand side options.
3. Make the necessary changes and then click  to update the customers' information, or  to exit.

**NOTE:** You cannot change the customer's password. A customer can request a 'lost password' via the shops interface and it will automatically generate a new password for them and send to their customer profile's email address.

## NEW ORDER

This button allows you to add a new order to the selected customer. This might be used if the order is placed via an offline method such as phone or fax.

1. Select the Customer you wish to add the new order to from the list, by clicking once to highlight.
2. Click the  button from the right hand side options. The following will appear:

**Edit Order (Nr. -1 of 18/06/2008 12:06:50)**

Customer Details | Status | Payments & Postage

	Address	Shipping Address	Billing Address
Name:	Kristi Huttunen	Kristi Huttunen	Kristi Huttunen
Address:	16 Highlands Way	16 Highlands Way	16 Highlands Way
Suburb:	Rouse Hill	Rouse Hill	Rouse Hill
City:	Sydney	Sydney	Sydney
State:	New South Wales	New South Wales	New South Wales
Postcode:	2155	2155	2155
Country:	Australia	Australia	Australia
Phone:	96266244		
E-Mail:	kristi@helpwise.com.au		

Ordered Products

Delete	Brand	Model	Product	QTY	Price (excl)	GST	Total (incl)	Weight	ETA	Status	Date Modified	Loan Pick Del
Discount, Shipping and Total												
Total Price Component Weight												
Total Weight:											0.00	
Tax %												
Shipping tax:											0.00	
Amount												

Please click on "Update" to save all changes.

Above: Add new order screenshot

3. The **Customer Details Tab** will be pre-entered from their profile.
4. The **Status Tab** will allow you to change the status of the order to the appropriate option from the drop down list.
5. The **Payments & Postage Tab** will allow you to choose the payment option and enter the shipping price for the order.

### To add a product to the order

1. Click the  button at the bottom left of the screen. This will then appear below the button:

brand	product	qty	attributes
<input type="text" value=""/>	<input type="text" value="All"/>	<input type="text" value="1"/>	
<input type="button" value="save"/>	<input type="button" value="Cancel"/>		

Above: Add a product screenshot

**Note:** To add more than one product, click the  button again.

2. Choose the Brand (if needed) from the drop down. This will filter the product drop down by the brand selected.
3. Choose the Product from the drop down list.
4. Type in the Quantity.
5. Choose any attributes that appeared once the product was chosen.
6. Click  to confirm the products and update the rest of the order, or click  to minimize and exit the add products option.

## DELETE

**NOTE: Deleting a customer will NOT delete their orders. Be careful when deleting a customer!**


1. Select the Customer you wish to delete from the list, by clicking once to highlight.
2. Click the  button from the right hand side options.
3. A warning message will appear, asking if you sure you would like to delete the customer.
4. To continue deleting the customer click  or  to exit.

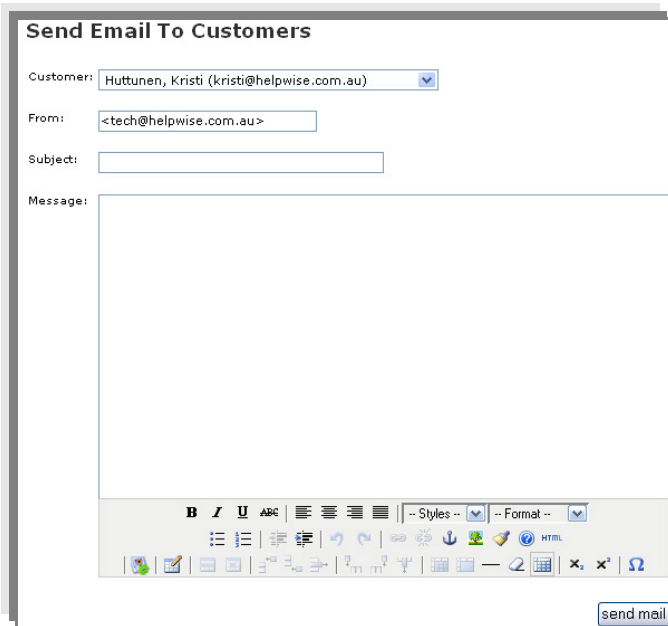
## ORDERS

1. Select the Customer you wish to view orders from, by clicking once to highlight.
2. Click the  button from the right hand side options.  
This will then take you to the orders screen, filtered by and showing all orders by the selected customer.


## EMAIL

This button allows you to send an email directly from within the administration to the selected customer.

1. Select the Customer you wish send an email to from the list by clicking once to highlight.
2. Click on the  icon. The following will appear:



Above: Send Email screenshot

3. The **Customer** drop down will be preselected with the customer chosen, or you can choose another customer or option from the list.
4. Type in the **From** email address you wish to use.  
Format: <sales@shop.com.au> or to include a name: Name Here <sales@shop.com.au>
5. Type in the **Subject** of the email.
6. Compose your email, and once you have finished click the  button to send.

## ORDERS

Once a customer has placed an order, an email will be sent to you with notification of the new order and its details.

Choose **Orders** from the homepage Panel.

This section allows you to:

- View details, edit and delete orders.
- Print: Invoice and Packing Slip



Above: Orders admin panel screenshot

Customers	Order Total	Date Purchased	Suburb	Postcode	Status	Action
Kristi Huttunen	AUD\$51.95	18/06/2008 16:02:52	Rouse Hill	2155	Processing (284)	➔
Kristi Huttunen	AUD\$7.95	18/06/2008 15:57:47	Rouse Hill	2155	Pending (283)	ⓘ
Kristi Huttunen	AUD\$44.25	18/06/2008 12:06:29	Rouse Hill	2155	Pending (282)	ⓘ
Ben Rowe	AUD\$24.20	12/06/2008 12:30:24			Pending (281)	ⓘ
Ben Rowe!!	AUD\$416.50	30/05/2008 17:27:15			Pending (280)	ⓘ
Pete Needham	AUD\$4.40	18/07/2007 23:44:07			Pending (279)	ⓘ
Pete Needham	AUD\$4.00	09/07/2007 17:00:57			Pending (278)	ⓘ
Pete Needham	AUD\$4.00	09/07/2007 16:58:05			Pending (277)	ⓘ
Pete Needham	AUD\$4.00	09/07/2007 16:52:44			Pending (276)	ⓘ
Pete Needham	AUD\$217.00	09/07/2007 16:50:44			Pending (275)	ⓘ

Search By: Order ID [ ] Search

Status: All Orders [ ]

[284] 18/06/2008 16:02:52

details delete

invoice packing slip edit

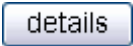
Date Created: 18/06/2008  
Last Modified: 18/06/2008  
Payment Method: Direct Deposit

Displaying 0 to 0 (of 10 orders) Page 1 of 1

Above: Orders screenshot

## DETAILS

The details page allows you to quickly view the order details and update the status **ONLY**.

1. Select the Order from the list by clicking once to highlight.
2. Click the  button from the right hand side options. This will then take you to the order details screen.

**Orders** [back](#)

<b>Customer:</b> Kristi Huttunen 16 Highlands Way Rouse Hill Sydney, 2155 New South Wales, Australia	<b>Shipping Address:</b> Kristi Huttunen 16 Highlands Way Rouse Hill Sydney, 2155 New South Wales, Australia	<b>Billing Address:</b> Kristi Huttunen 16 Highlands Way Rouse Hill Sydney, 2155 New South Wales, Australia
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**Telephone Number:** 96266244  
**E-Mail Address:** [kristi@helpwise.com.au](mailto:kristi@helpwise.com.au)  
**IP Address:** 122.201.73.17  
**ISP:** demoshop.helpwise.com.au

**Payment Method:** Direct Deposit

Products	Model	Tax	Price (ex)	Price (inc)	Total (ex)	Total (inc)
2.0 x name product name	ffff	10.00%	AUD\$20.00	AUD\$22.00	AUD\$40.00	AUD\$44.00

Sub-Total: AUD\$44.00  
 10% GST: AUD\$4.00  
 Standard Post (2-3 working days): AUD\$7.95  
 (Gift Wrap): AUD\$0.00  
 discount: AUD\$0.00  
**Total: AUD\$51.95**

Date Added	Customer Notified	Status	Comments
18/06/2008 16:02:52	✘	Processing	




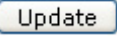
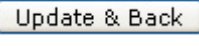
**Comments**

**Status:** Processing [Update](#) [Update & Back](#)

**Notify Customer:**  **Append Comments:**

edit
invoice
packing slip
back

Above: Order details screenshot

3. Update the status of the order, and type in any comments, tick the Notify Customer and Append Comments boxes if needed.
4. To edit the whole order click .
5. To view and print an invoice for this order, click .
6. To view and print a packing slip for this order, click .
7. To save the changes to the Order click  to stay on the page, or  to save and return to the orders list.

### To Update the Status of the Order

Date Added	Customer Notified	Status	Comments
10/01/2007 17:26:28	✓	Pending	

**Comments**

Status:

Notify Customer:       Append Comments:

Above: Status update section screenshot

The status drop down box allows you to change the current situation of the customer's order to one of the following:

- Pending (the default option).
- Processing
- Delivered
- Canceled

#### Notify Customer:


Tick this box if you wish to notify the customer on any changes made to the status of an order via email. **NOTE:** It is recommended that you tick this box in order for your customers to be up to date on the status of their order.

#### Append Comments

Tick this box if you wish to allow the customer to view comments made about this update. If it is un-ticked, the customer will not receive comments made in the email sent but will be able to view them in their account under **Order History**.


## INVOICE

To view and print an invoice for the order:

1. Select the order you wish to view and print the invoice for and click .
2. This will open the invoice in a new window ready to print.

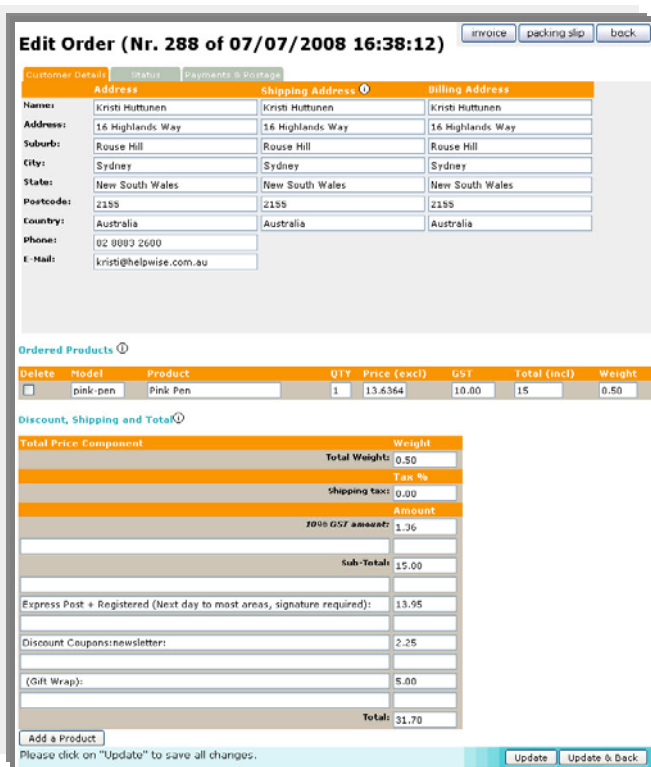
## PACKING SLIP


To view and print a packing slip for the order:

1. Select the order you wish to view and print the packing slip for and click .
2. This will open the packing slip in a new window ready to print.

## EDIT

To edit the customer details, status, payments and postage, ordered products, discount, shipping and total costs choose the appropriate tab.



**Edit Order (Nr. 288 of 07/07/2008 16:38:12)**   

**Customer Details** | **Status** | **Payments & Postage**

	Address	Shipping Address	Billing Address
Name:	Kristi Huttunen	Kristi Huttunen	Kristi Huttunen
Address:	16 Highlands Way	16 Highlands Way	16 Highlands Way
Suburb:	Rouse Hill	Rouse Hill	Rouse Hill
City:	Sydney	Sydney	Sydney
State:	New South Wales	New South Wales	New South Wales
Postcode:	2155	2155	2155
Country:	Australia	Australia	Australia
Phone:	02 8083 2600		
E-Mail:	kristi@helpwise.com.au		

**Ordered Products**

Delete	Model	Product	QTY	Price (excl)	GST	Total (incl)	Weight
<input type="checkbox"/>	pink-pen	Pink Pen	1	13.6364	10.00	15	0.50

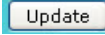
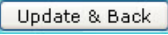
**Discount, Shipping and Total**

Total Price Component	Weight
Total Weight:	0.50
Tax %:	
Shipping tax:	0.00
Amount	
2006 GST amount:	1.36
Sub-Total:	15.00
Express Post + Registered (Next day to most areas, signature required):	13.95
Discount Coupons:newsletter:	2.25
(Gift Wrap):	5.00
<b>Total:</b>	<b>31.70</b>

Please click on "Update" to save all changes.

Above: Edit order screenshot

Make any of the necessary changes.

For the changes to be saved, you must click one of the following:  .