How do I check and manage my orders in ShopFactory Cloud?

Merliza N. - 2021-08-02 - Order Management

ShopFactory Cloud services include Online Order Management feature where your orders are stored on a PCI-compliant cloud server. You can manage your orders via a secure interface - view order details, update order status (payment/shipping), add order status comments, print or send invoices to your customers, edit & update customer details if there are any typo in their order, contact your customers, print packing slips, print shipping labels, download orders and export to a third party backend system, etc.

Checkpoint: Ensure you have setup your merchant details in the ShopFactory Cloud backend - your company details are required for generating invoices, etc.

- Add your **company logo** in http://app.santu.com/buynow/profile/logo

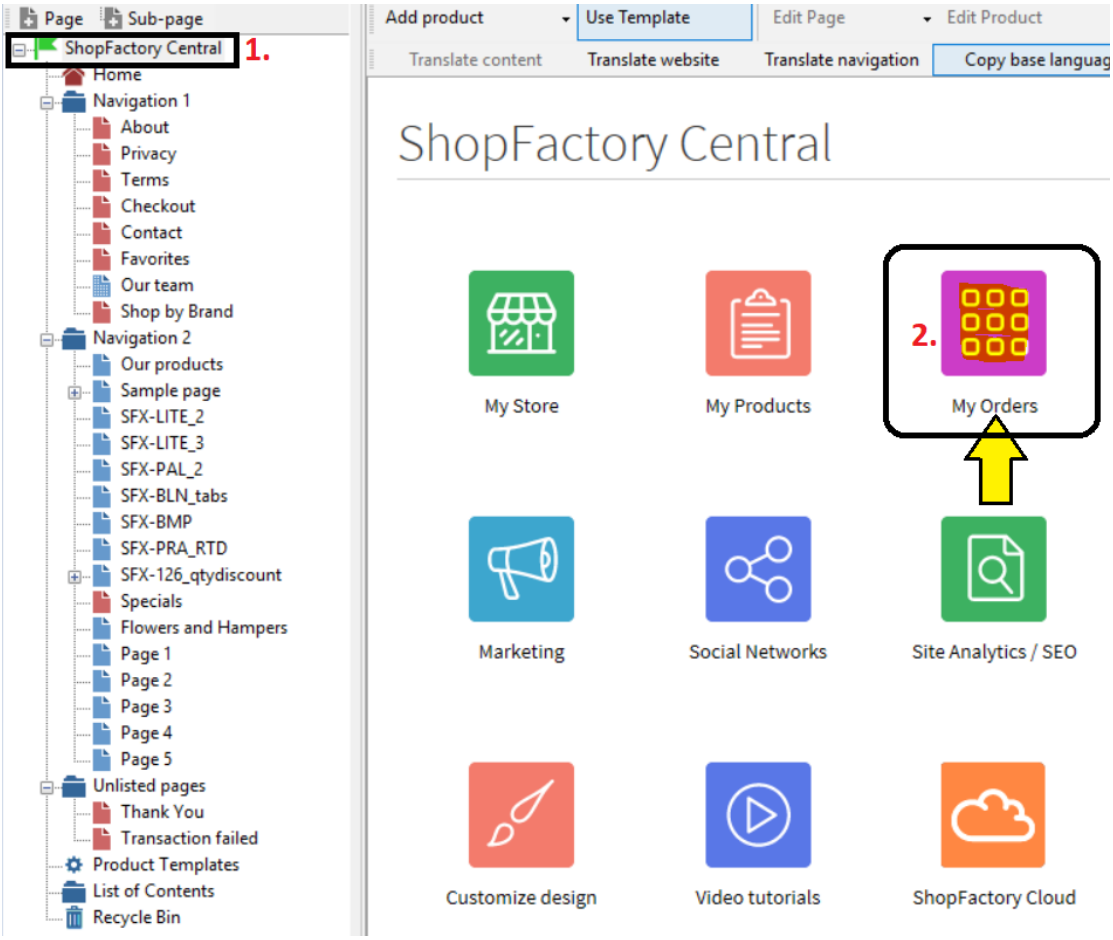
- Add your SF **Shop URL** in http://app.santu.com/buynow/profile/shopfactory

- Add your Tax ID, Company Number, Store Name, Telephone details, etc. in “My Store” http://app.santu.com/buynow/store - your phone number should also match in the profile page, http://app.santu.com/buynow/profile

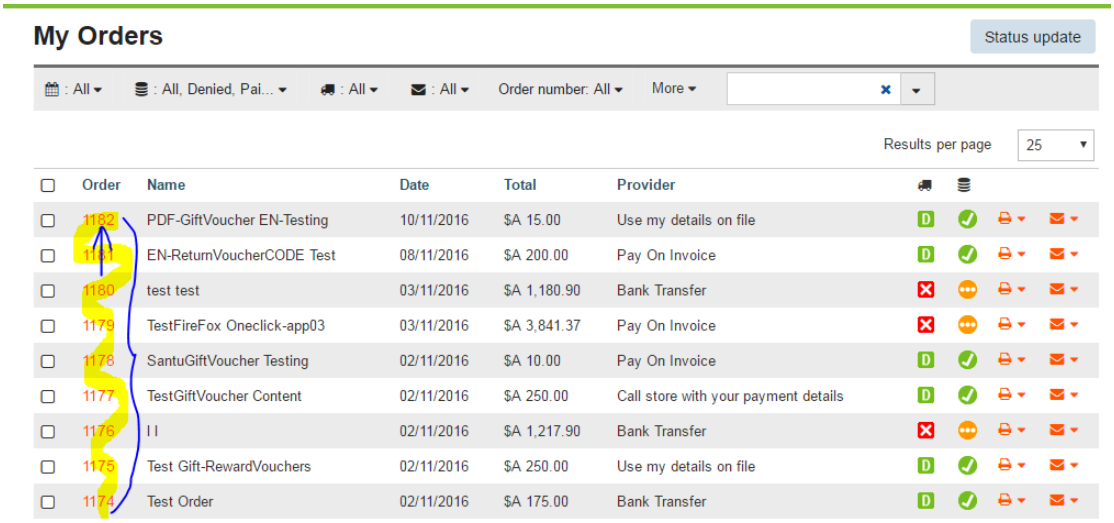
1. Checking online orders

To check your orders, please do the following:
- Open your shop in ShopFactory

- At the left tree menu, click on **ShopFactory Central** category (or click on the ***Central*** icon from the toolbar) -> click ***My Orders*** to connect to the ShopFactory Cloud backend - this opens up the Orders page on your default browser



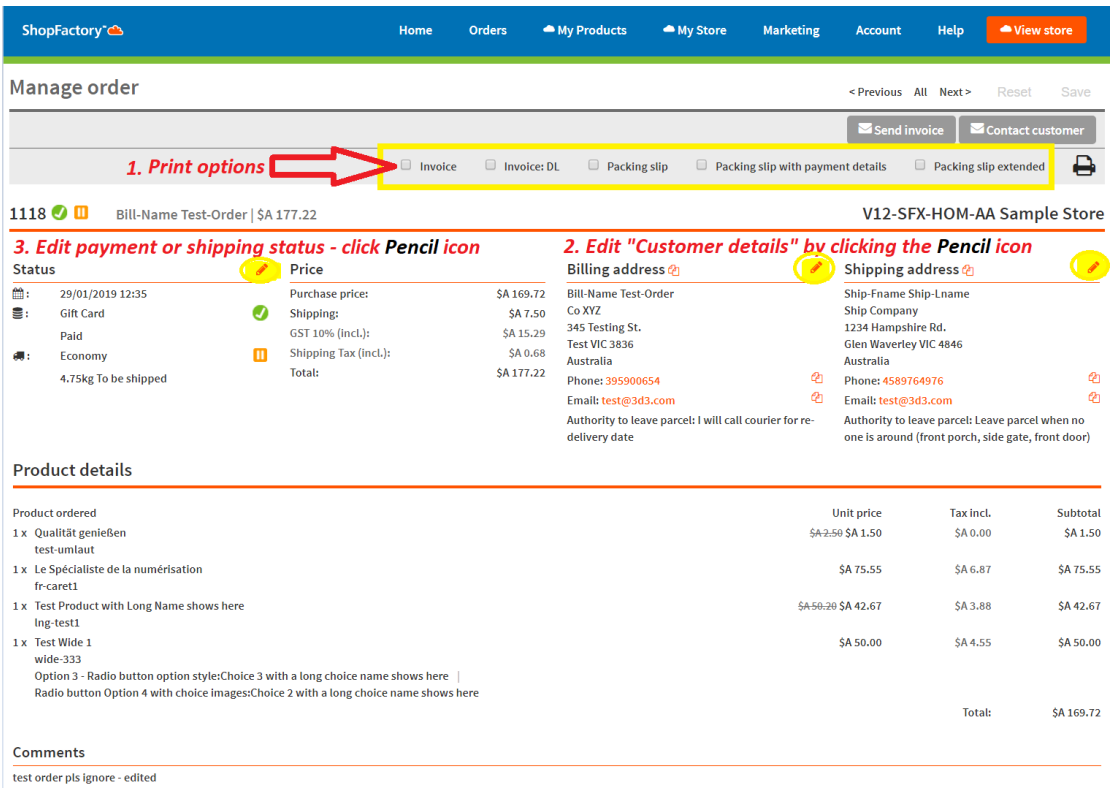
- Click the order number link to view the order details. You can then update the payment/shipping status of this order by clicking the *status* icon.



- Click the link for *Payment* to update the Payment status of an order - you will then see the ***Edit Status*** section

- Click the link for *Shipping* to change Shipping status

- Update the order status and you can add payment/shipping comments including Tracking URL and shipping provider information on this page



- Click **Save** button to save changes

- Click on the Orders menu to go back to the orders list page.

NOTE: You can edit Customer Details in an order i.e. if they have made any typo

- Click on an order number to go into the Order details page

- Click the EDIT (Pencil) icon beside the "Billing Address" or the "Shipping Address" title

- Edit the customer details

- Click Save

At this stage, your customer will receive an email notification that their details have been updated.

2. Downloading orders using 'Export Orders' function

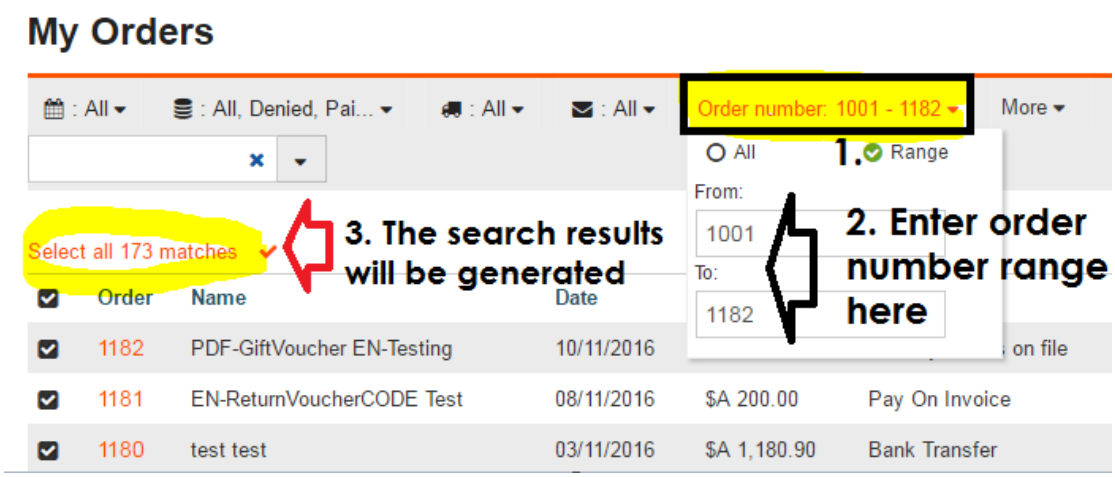
There are several download formats supported including XML, CSV, TXT, and so on - compatible with SalesManager, X-Count, Lexware, Inet Expeditor Coliposte, MYOB, Easyfatt, Quickbooks US.

For example, ShopFactory SF Cloud users can export out both "Order Data" and "Customer Address Data" directly to a .csv file format. This new feature allows you to use the customer and order data in a variety of other third party tools, like Excel or other database applications.

In the new ShopFactory Cloud interface, go to your Orders List page, http://app.santu.com/buynow/order/list

- click on the "*Order Number*" dropdown -> select "**Range**" radio option and then enter the start order number and last order number you wish to download or export.

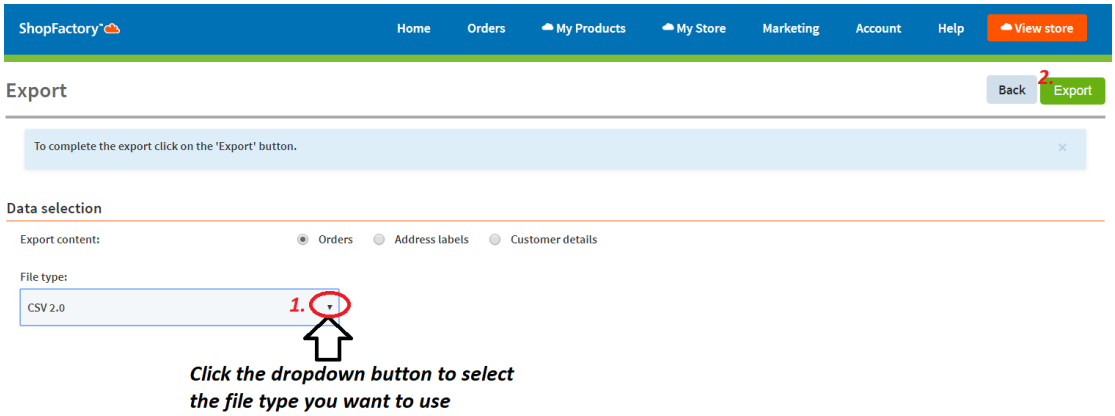
- Once you have entered the last order number, the search results will be displayed -> click on the "Select all XXX matches" link - see below screenshot for more info:



- Scroll down the page and click the "**Select an action**" dropdown -> **EXPORT**

- Select *ORDERS* option -> then you will be able to select which data type format you wish to export the orders into.

- A file will be generated according to the format you have selected.



For more information regarding Santu Express Checkout and Order Tracking service, please refer to the KB article below:

Santu Express Checkout and Order Tracking service

https://shopfactory.deskpro.com/en/kb/articles/santu-express-checkout-and-order-tracking-service