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

Merliza N. - 2021-08-02 - [Gestión de los encargos](#)

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.

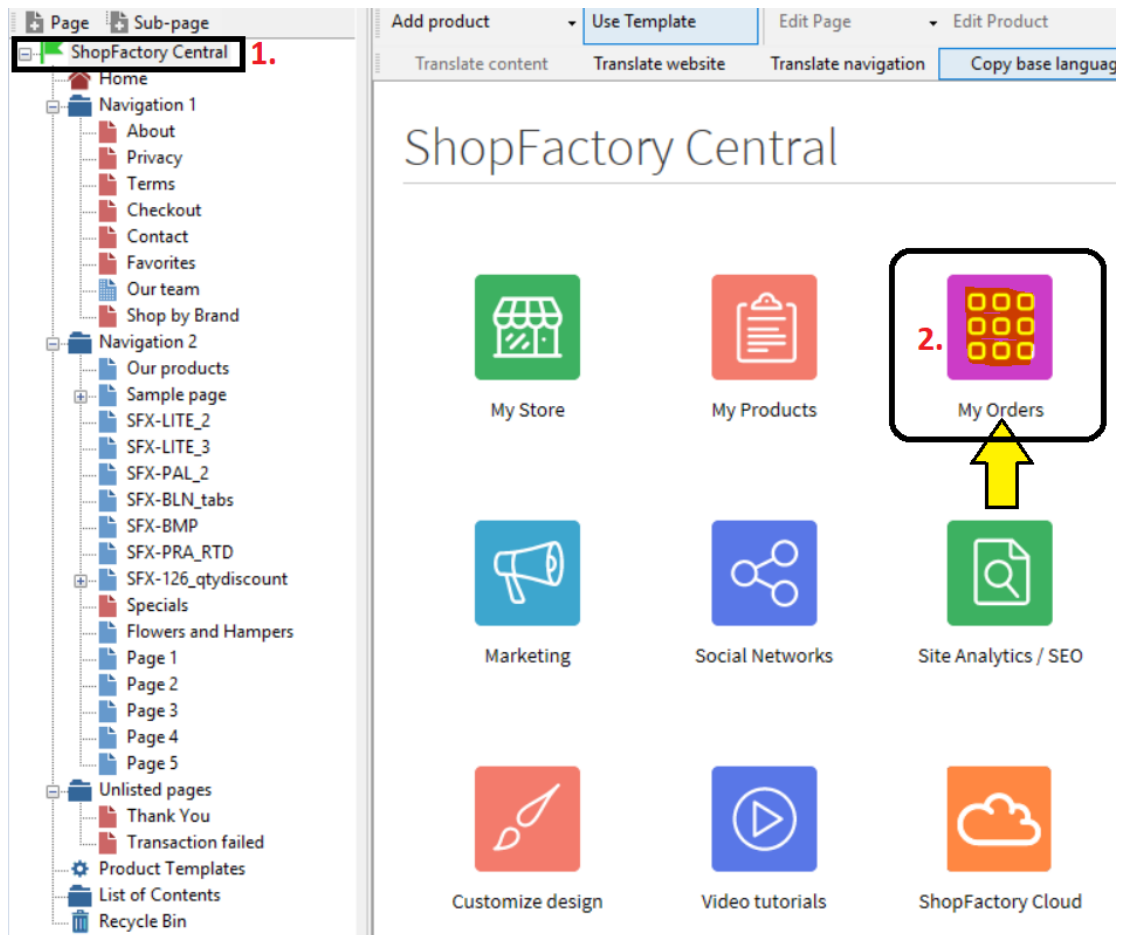
Checkpoint: Ensure you have setup your merchant details in the ShopFactory Cloud backend - your company details are required for generating invoices, etc.

- 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.

| My Orders | | | | | | | Status update |
|--|-------|----------------------------|------------|--------------|--------------------------------------|---|---------------------|
| <div> 📅 : All 📋 : All, Denied, Pal... 📞 : All ✉ : All Order number: All More <input type="text"/> </div> | | | | | | | |
| | | | | | | | Results per page 25 |
| <input type="checkbox"/> | Order | Name | Date | Total | Provider | | |
| <input type="checkbox"/> | 1192 | PDF-GiftVoucher EN-Testing | 10/11/2016 | \$A 15.00 | Use my details on file | D ✓ 📄 ✉ | |
| <input type="checkbox"/> | 1171 | EN-ReturnVoucherCODE Test | 08/11/2016 | \$A 200.00 | Pay On Invoice | D ✓ 📄 ✉ | |
| <input type="checkbox"/> | 1180 | test test | 03/11/2016 | \$A 1,180.90 | Bank Transfer | ✗ ⋮ 📄 ✉ | |
| <input type="checkbox"/> | 1179 | TestFireFox Oneclick-app03 | 03/11/2016 | \$A 3,841.37 | Pay On Invoice | ✗ ⋮ 📄 ✉ | |
| <input type="checkbox"/> | 1176 | SantuGiftVoucher Testing | 02/11/2016 | \$A 10.00 | Pay On Invoice | D ✓ 📄 ✉ | |
| <input type="checkbox"/> | 1177 | TestGiftVoucher Content | 02/11/2016 | \$A 250.00 | Call store with your payment details | D ✓ 📄 ✉ | |
| <input type="checkbox"/> | 1176 | 11 | 02/11/2016 | \$A 1,217.90 | Bank Transfer | ✗ ⋮ 📄 ✉ | |
| <input type="checkbox"/> | 1175 | Test Gift-RewardVouchers | 02/11/2016 | \$A 250.00 | Use my details on file | D ✓ 📄 ✉ | |
| <input type="checkbox"/> | 1174 | Test Order | 02/11/2016 | \$A 175.00 | Bank Transfer | D ✓ 📄 ✉ | |

- 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

ShopFactory
Home
Orders
My Products
My Store
Marketing
Account
Help
View store

Manage order
Previous
All
Next
Reset
Save
Send invoice
Contact customer

1. Print options
Invoice
Invoice: DL
Packing slip
Packing slip with payment details
Packing slip extended

1118
Bill-Name Test-Order | \$A 177.22
V12-SFX-HOM-AA Sample Store

3. Edit payment or shipping status - click Pencil icon

2. Edit "Customer details" by clicking the Pencil icon

| Status | Price | Billing address | Shipping address |
|--|--|---|--|
| <div> <div>29/01/2019 12:35</div> <div>Gift Card</div> <div>Paid</div> <div>Economy</div> <div>4.75kg To be shipped</div> </div> | <div> <div>Purchase price:</div> <div>\$A 169.72</div> <div>Shipping:</div> <div>\$A 7.50</div> <div>GST 10% (incl.):</div> <div>\$A 15.29</div> <div>Shipping Tax (incl.):</div> <div>\$A 0.68</div> <div>Total:</div> <div>\$A 177.22</div> </div> | <div> <div>Bill-Name Test-Order</div> <div>Co XYZ</div> <div>345 Testing St.</div> <div>Test VIC 3836</div> <div>Australia</div> <div>Phone: 395900654</div> <div>Email: test@3d3.com</div> <div>Authority to leave parcel: I will call courier for re-delivery date</div> </div> | <div> <div>Ship-Fname Ship-Lname</div> <div>Ship Company</div> <div>1234 Hampshire Rd.</div> <div>Glen Waverley VIC 4846</div> <div>Australia</div> <div>Phone: 4589764976</div> <div>Email: test@3d3.com</div> <div>Authority to leave parcel: Leave parcel when no one is around (front porch, side gate, front door)</div> </div> |

Product details

| Product ordered | Unit price | Tax incl. | Subtotal |
|--|---------------------|-----------|------------|
| 1 x Qualität genießen test-umlaut | \$A 2.50 \$A 1.50 | \$A 0.00 | \$A 1.50 |
| 1 x Le Spécialiste de la numérisation fr-care1 | \$A 75.55 | \$A 6.87 | \$A 75.55 |
| 1 x Test Product with Long Name shows here lng-test1 | \$A 50.20 \$A 42.67 | \$A 3.88 | \$A 42.67 |
| 1 x Test Wide 1 wide-333 Option 3 - Radio button option style:Choice 3 with a long choice name shows here Radio button Option 4 with choice images:Choice 2 with a long choice name shows here | \$A 50.00 | \$A 4.55 | \$A 50.00 |
| | | Total: | \$A 169.72 |

Comments
test order pls ignore - edited

- 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 Expedito 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:

My Orders

Order number: 1001 - 1182

Select all 173 matches

3. The search results will be generated

2. Enter order number range here

| Order | Name | Date |
|-------|----------------------------|------------|
| 1182 | PDF-GiftVoucher EN-Testing | 10/11/2016 |
| 1181 | EN-ReturnVoucherCODE Test | 08/11/2016 |
| 1180 | test test | 03/11/2016 |

- 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.

ShopFactory

Home Orders My Products My Store Marketing Account Help View store

Export

To complete the export click on the 'Export' button.

Data selection

Export content: ☒ Orders ☐ Address labels ☐ Customer details

File type: CSV 2.0

1. Click the dropdown button to select the file type you want to use

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>