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# 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.

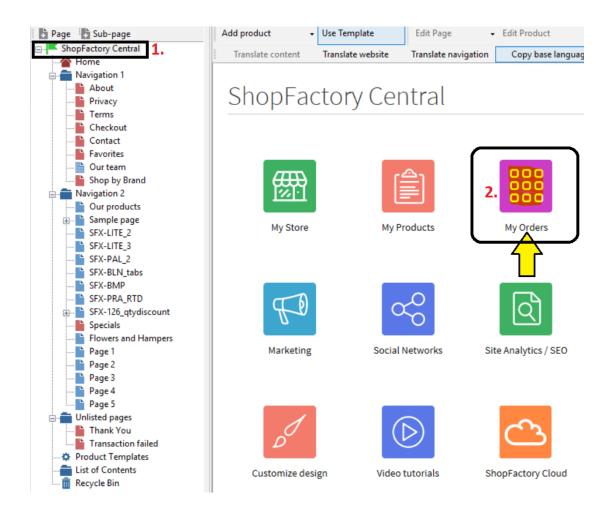
Checkpoint: Ensure you have setup your merchant details in the ShopFactory Cloud backend - your company details are required for generating invoices, etc.

- Add your company logo in <a href="http://app.santu.com/buynow/profile/logo">http://app.santu.com/buynow/profile/logo</a>
- 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" <a href="http://app.santu.com/buynow/store">http://app.santu.com/buynow/store</a> your phone number should also match in the profile page, <a href="http://app.santu.com/buynow/profile">http://app.santu.com/buynow/profile</a>

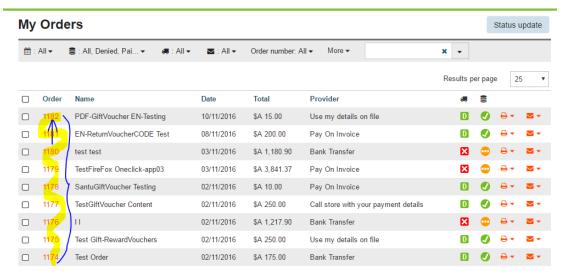
### 1. Checking online orders

To check your orders, please do the following:

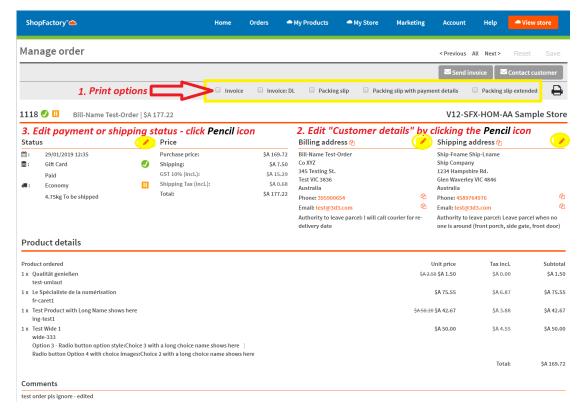
- Open your shop in ShopFactory
- At the left tree menu, click on **ShopFactory Central** category (or click on the *Central* icon from the toolbar)
- -> click **My Orders** to connect to the ShopFactory Cloud backend this opens up the Orders page on your default browser



- 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  $\pmb{Edit Status}$  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  $\frac{1}{2}$



- 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

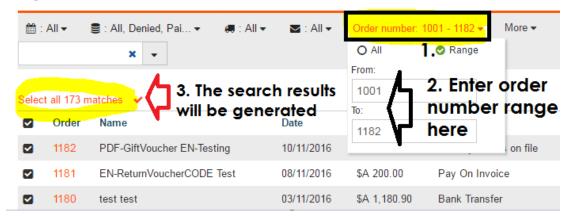
 $There \ are \ several \ download \ formats \ supported \ including \ XML, \ CSV, \ TXT, \ and \ so \ on \ -compatible \ with \ SalesManager, \ X-Count, \ Lexware, \ Inet \ Expeditor \ Coliposte, \ MYOB, \ Easyfatt, \ Quickbooks \ US.$ 

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.

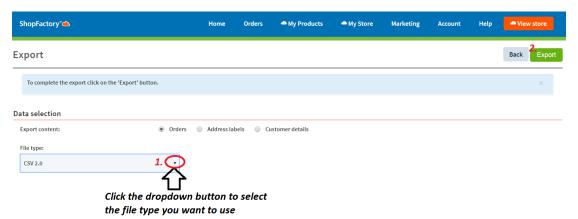
In the new ShopFactory Cloud interface, go to your Orders List page, http://app.santu.com/buynow/order/list

- 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:

# My Orders



- Scroll down the page and click the "Select an action" dropdown ->  ${\bf EXPORT}$
- 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