relevant ecommerce™

ZNODE MARKETPLACE 8.1.2 USER MANUAL

April 2016

Znode 8.1.2 Orders Manual

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1 REVISION HISTORY

Section	Date	Change Made
	5/6/2015	First Draft

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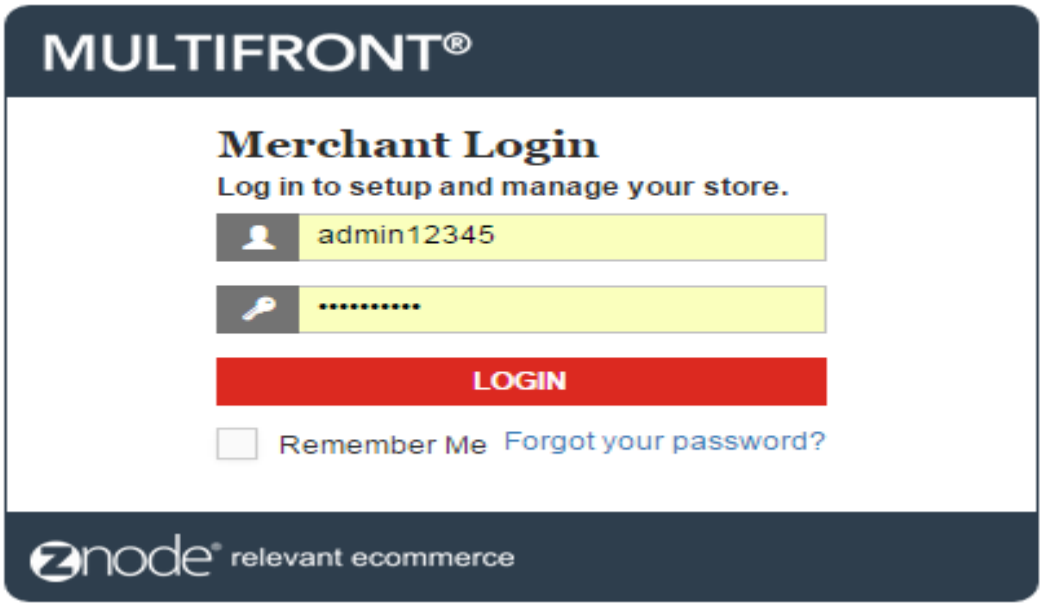
2 LOGIN TO THE MARKETPLACE ADMIN SITE

Users with Administrator access can login to the Marketplace administration website to manage every aspect of the Marketplace:

- Access the following web address in your browser:

  Go to the URL **http://www.yourdomain.com/siteadmin** where **www.yourdomain.com** should be replaced with your storefront's domain name. Note that if the website is installed in your local machine the domain name will be "localhost"

- The **Marketplace Management Login** page is displayed.



- Type your administrator user name and password. When the Marketplace is first installed the default user name is "admin" and the password is "admin".
- Click **Login**.
- Upon successful login, the **Dashboard** page is displayed.

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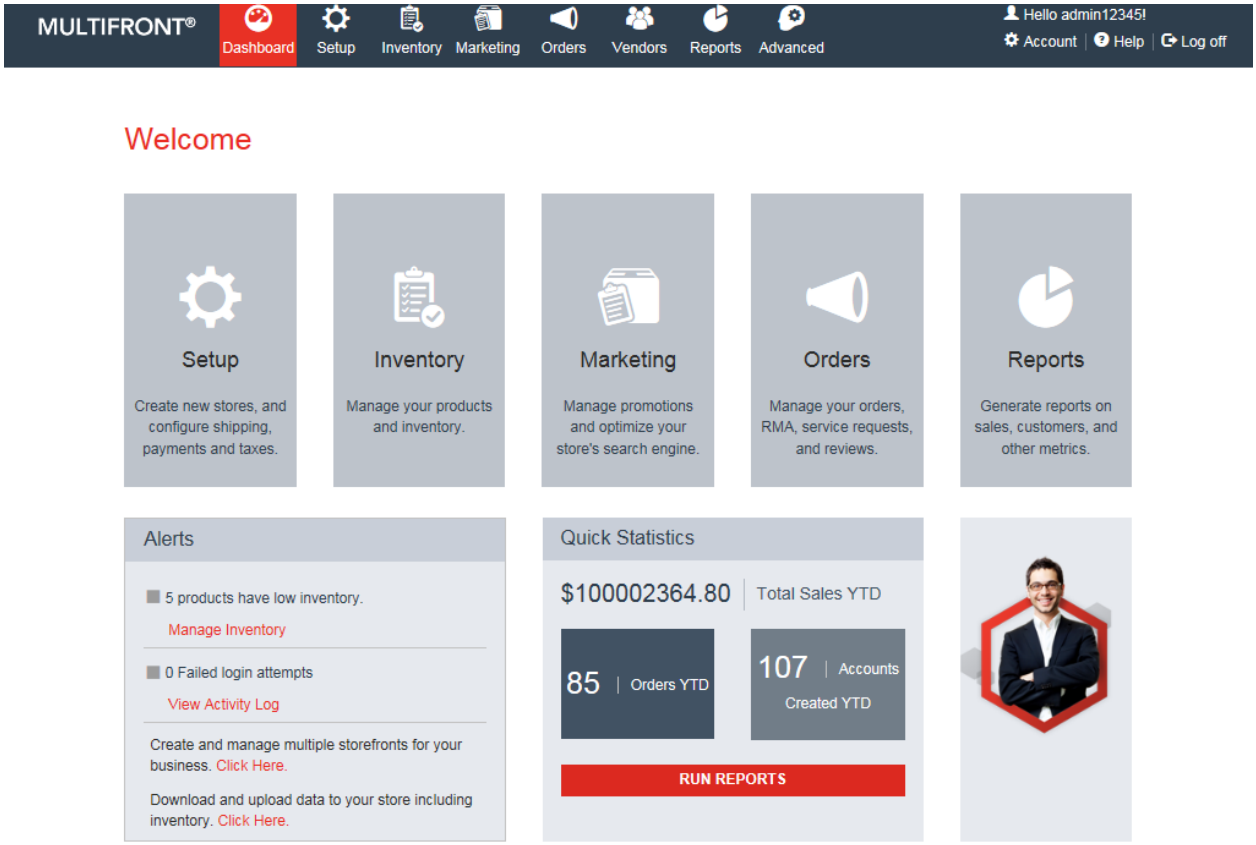

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3 ORDER MANAGEMENT

From the **Order** section, the site administrator can manage Orders, Service Requests, RMA, Customers, Suppliers and place orders on behalf of the customers using the Create an Order.

3.1 View Orders

View orders page allows you to manage orders. You can search for orders using various criteria, view details of each order, change the order status and download order information.

3.1.1 Search and View Orders

To search for and view orders:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **View Orders** under **Orders**. The **View Orders** page is displayed listing all orders in the database.
3. To search for an order, under the **Search Orders** section, enter any or all of the following:
   - **Store Name**: Select a store name from the drop-down list.
   - **Order ID**: Enter the order ID.
   - **First Name**: Enter the first name.
   - **Last Name**: Enter the last name.
   - **Company Name**: Enter the company name.
   - **Account ID**: Enter the account number.
   - **Order Status**: Select the order status from the drop-down list.
   - **Begin Date**: Enter the begin date in MM/DD/YYYY format OR click the calendar button beside the date box to set the date.
   - **End Date**: Enter the end date in MM/DD/YYYY format OR click the calendar button beside the date box to set the date.
   - Click **Search**. All orders meeting the search criteria will be displayed under **Order List**.
4. Click **View** on the order to view its details. The **Order #** page is displayed listing the order information, customer information and order items.

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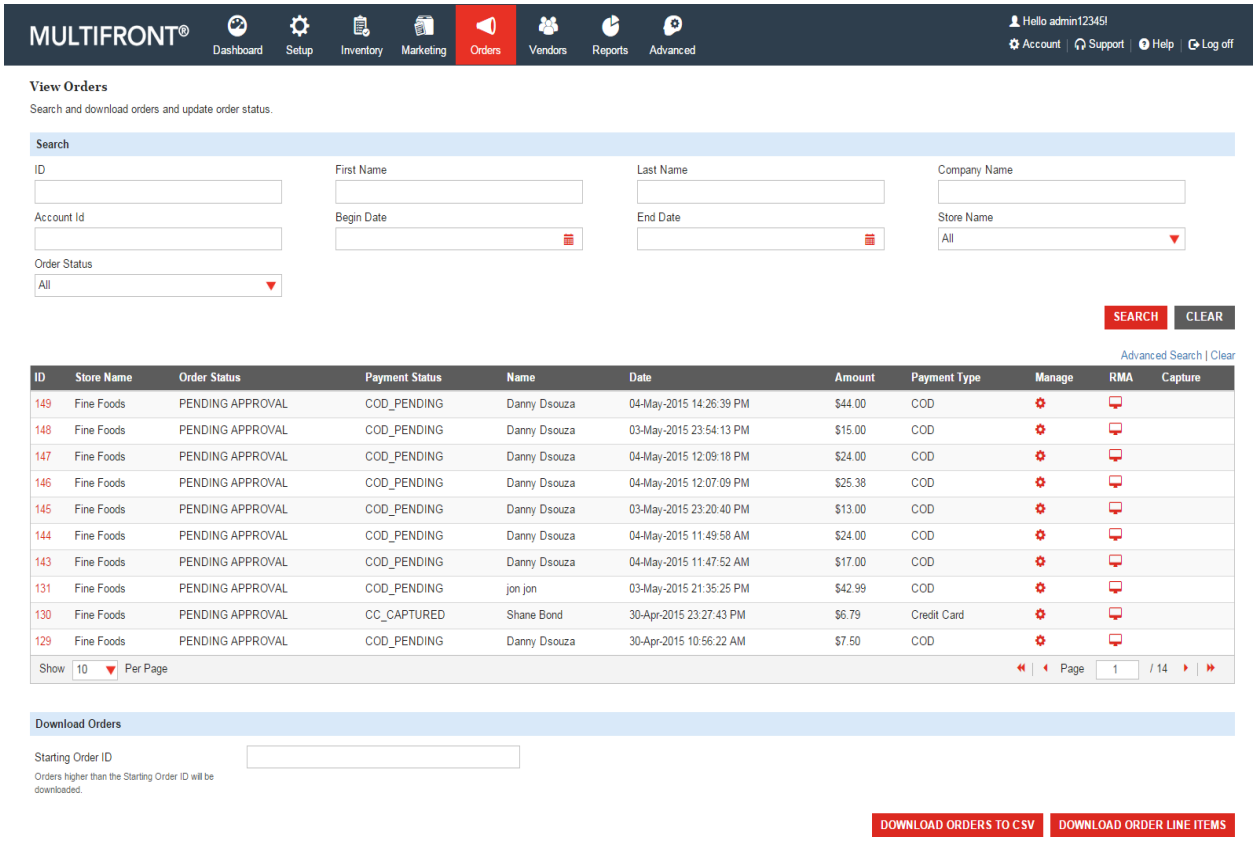

3.1.2 Changing an Order Status

Order Status shows in which stage of processing the orders are in. Changing the status can trigger other actions (such as email alerts) based on your store configuration.

There are four stages:

- Submitted
- Shipped
- Returned
- Canceled

As the order moves through each stage, its status must be updated.

To change the order status:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **View Orders** under **Orders**. The **View Orders** page is displayed listing all orders in the database.
3. Use **Search** to list only those orders for which you want to modify the status. Skip this step to view all orders.
4. Click **MANAGE ORDER** on the order to change its status. The **Order #** page is

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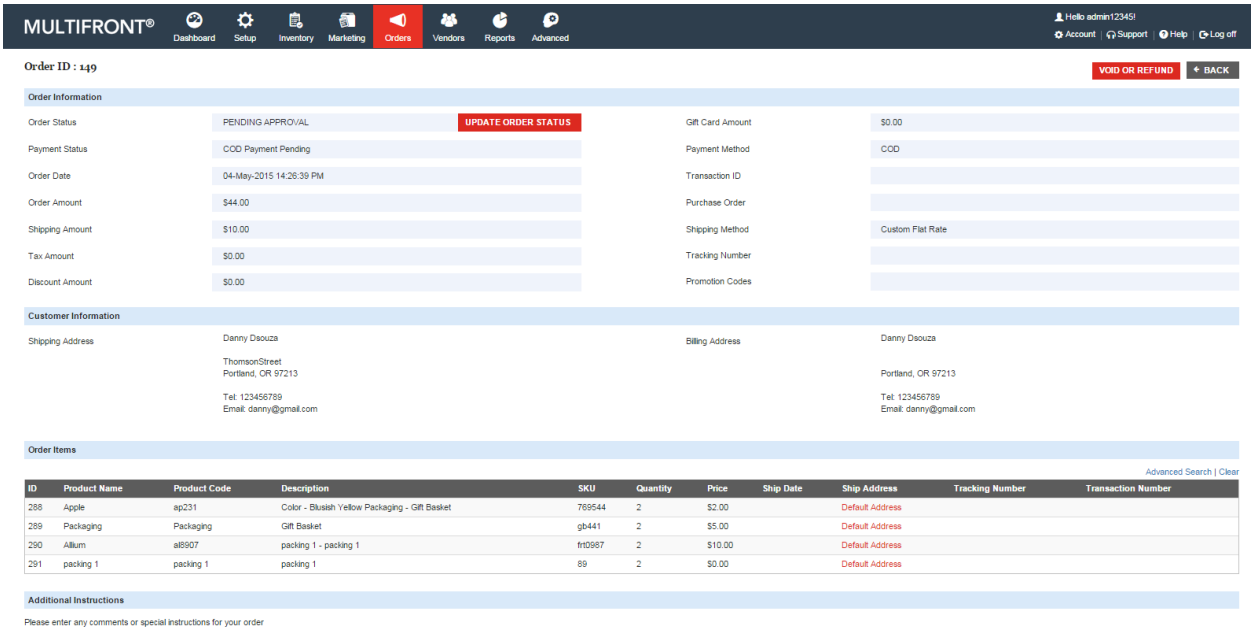
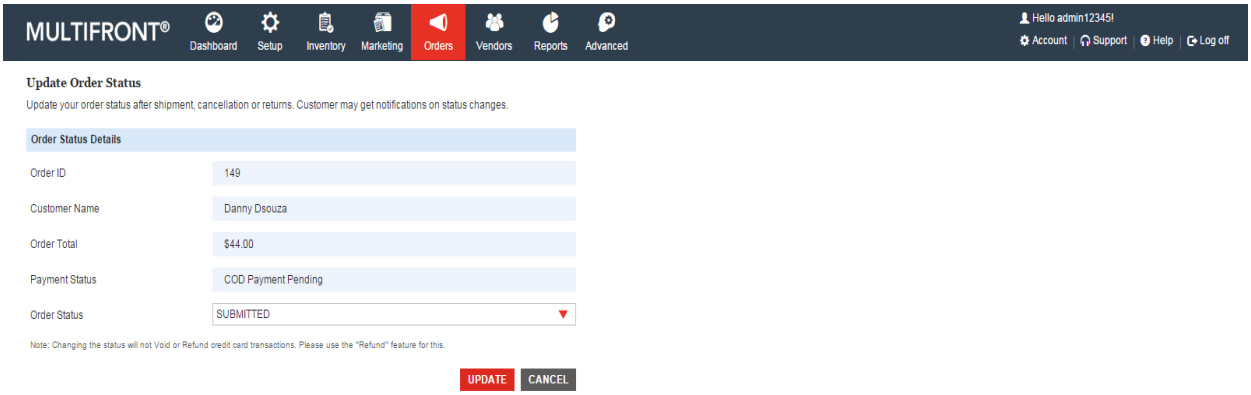
displayed.

5. Click on Update Order Status
6. Select the current status from the drop-down list.
7. Click **Update**. The Orders page is displayed with the status updated in the **Order list**.

Note: Changing the status will not Void or Refund credit card transactions. Please use the **Refund** feature for this.





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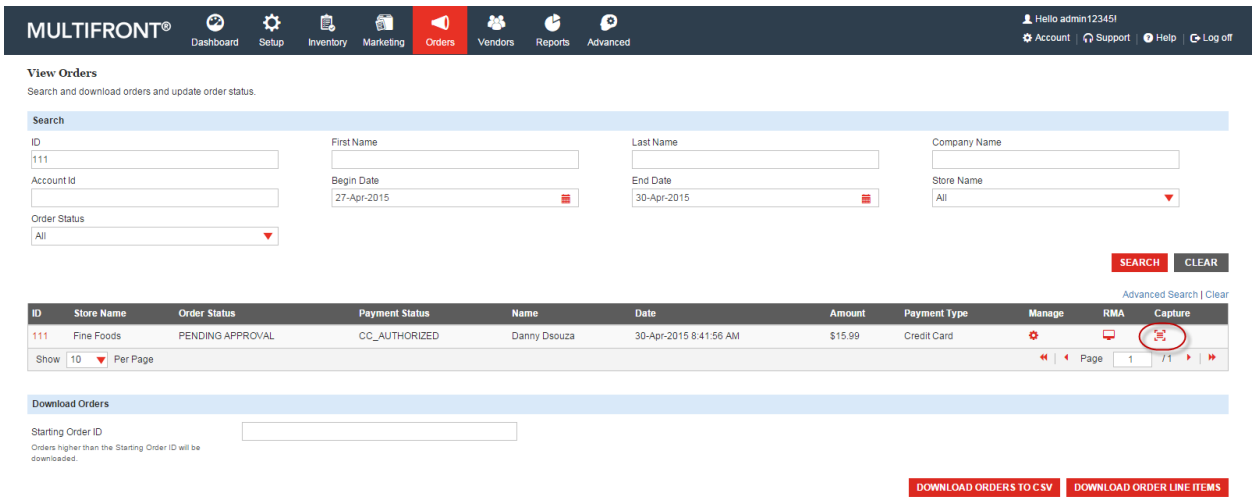
3.1.3 Capture

Use **Capture** to transfer the amount from customer credit card account to your merchant account.

Note: This function works only with **Authorize.Net** and **PayFlow Pro Gateways**.

To capture a previously authorized payment:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **View Orders** under **Orders**. The **View Orders** page is displayed listing all orders in the database.
3. Click **Capture** on the order to transfer funds. The **Capture Credit Card Payment** page is displayed.
4. Click **Capture**. The **Capture Credit Card Payment** page is displayed confirming that transaction was successfully captured.
5. Click **Back to order list**. The Orders page is displayed listing all the orders.



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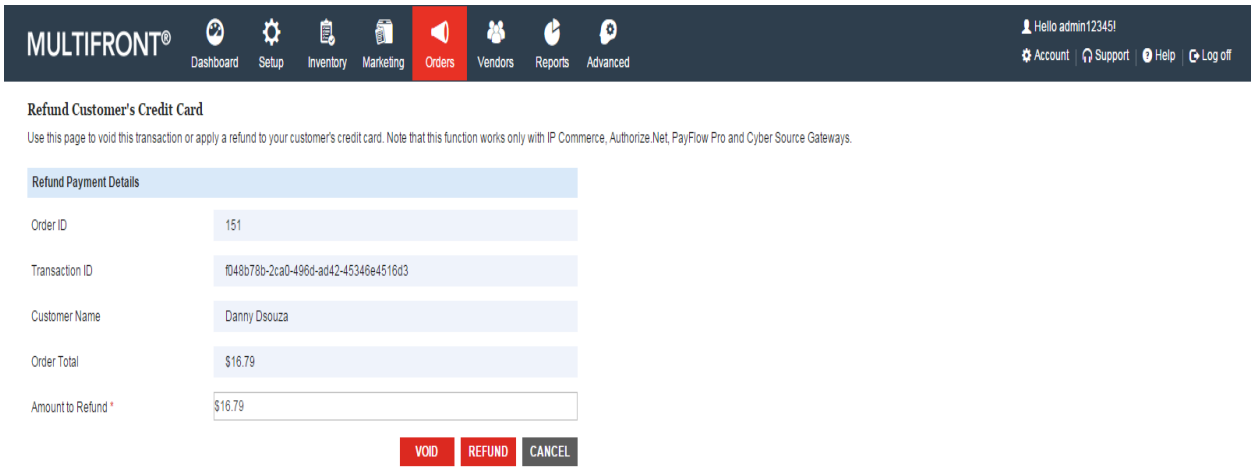
3.1.4 Refund

Use **Refund** to refund the amount to the customer's credit card account in case of a canceled or returned order.

Note: This function works only with **Authorize.Net** and **PayFlow Pro Gateways**.

To refund a previously authorized payment:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **View Orders** under **Orders**. The **View Orders** page is displayed listing all orders in the database.
3. Click MANAGE ORDER
4. Click **VOID OR REFUND** on the order to refund amount to the customer's credit card. The **Refund Customer's Credit Card** page is displayed.
5. Enter the following:
   - **Credit Card Number (last 4 digits)**: Enter the last four digits of the customer's credit card.
   - **Amount to Refund (does not apply to Voids)**: Enter the refund amount for captured orders. Leave blank for Voids.
6. Click **Refund** to refund amount for captured orders which were returned. Alternatively click **Void** to refund amount for canceled orders which were not captured. The Orders page is displayed and the customer credit card is credited with the refund amount.



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3.1.5 Download Order Information To Excel

Orders are stored in two separate files. The first file is for Orders. This file contains customer information and the total amount for each order. The second file is for Order Line Items. This file contains a detailed listing of all products in each order. Order line items can be matched up with their corresponding order in the Orders file by the Order ID column.

To download order information to Excel:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **View Orders** under **Orders**. The **View Orders** page is displayed listing all orders in the database.
3. Use **Search** to list only those orders you want to download. Skip this step to download all order information.

   OR

   Enter the **Beginning Order ID**: Enter the order ID from which you want to download. All orders after this order ID will be downloaded.
4. Click **Download Orders to Excel** to download all listed orders in the **Order List**.

   OR

   Click **Download Order line items to Excel** to download all listed orders details including the order line items in the **Order List**.

   The **File Download** dialog box opens.
5. Click **Save**, to save the file, else skip to step 8 to open the file. The **Save As** Dialog box opens.
6. In the **Save As** dialog box:
   - **Save in**: Select a location where you want to save the downloaded file.
   - **File Name**: Enter a file name. Else leave at default.
7. Click **Save**. The **Download complete** dialog box is displayed. You can view the downloaded file by opening it in Excel from the saved location.
8. Click **Open**. The order information file is opened in Excel, listing all the customers and their account details.

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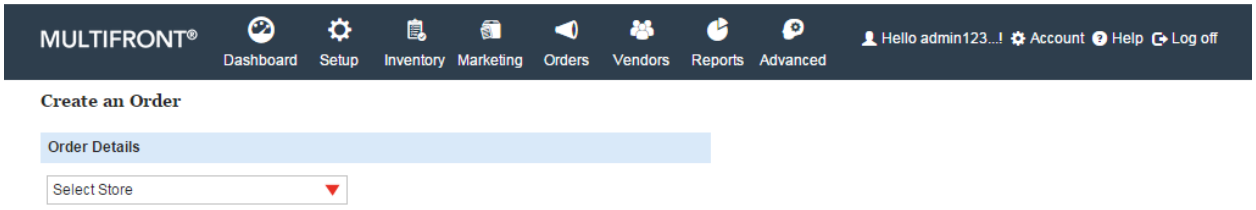
3.2 Create an Order

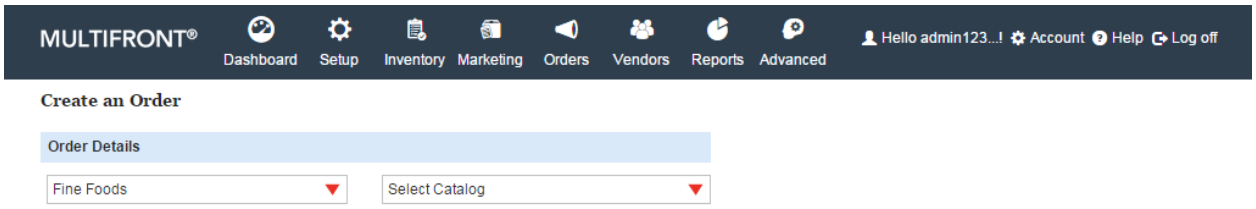
The Create an Order allows you to display multiple products on one page for faster purchases. The Customer Service Representative can quickly and efficiently place and complete orders for your customers, without navigating to multiple pages. This section deals with placing orders using the Order Desk.

To place orders using create an order:

- Login to the Admin site. The Dashboard page is displayed.
- On the top menu, click Create an Order under Orders. The Create an Order page is displayed.



- Select a store from the drop-down list to order its products. The Select Catalog drop-down is displayed.



- Select a catalog from the Select Catalog drop-down list. The Customer and Shopping Cart sections for this store and catalog are displayed.

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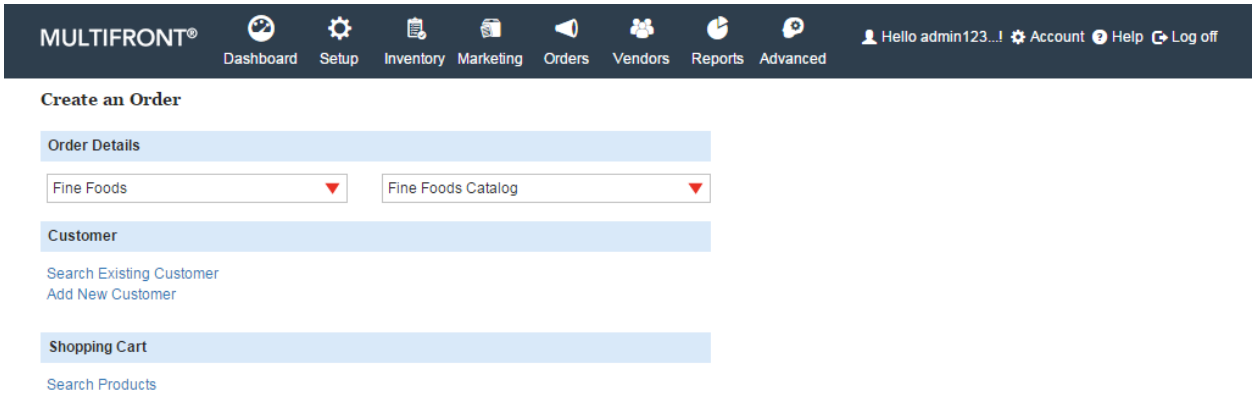

- To enter customer information you can either search for an existing customer or create a new customer.
- To search for an existing customer:
  - Click Search for a Customer. The Customer Search window is displayed.
  - Enter any or all of the following keywords: First Name, Last Name, Company Name, Zip, User ID or Order ID.
  - Click Search. All customers meeting the above search criteria will be displayed under Select Users.
  - Click on Browse link: The Marketplace will get display in new window.

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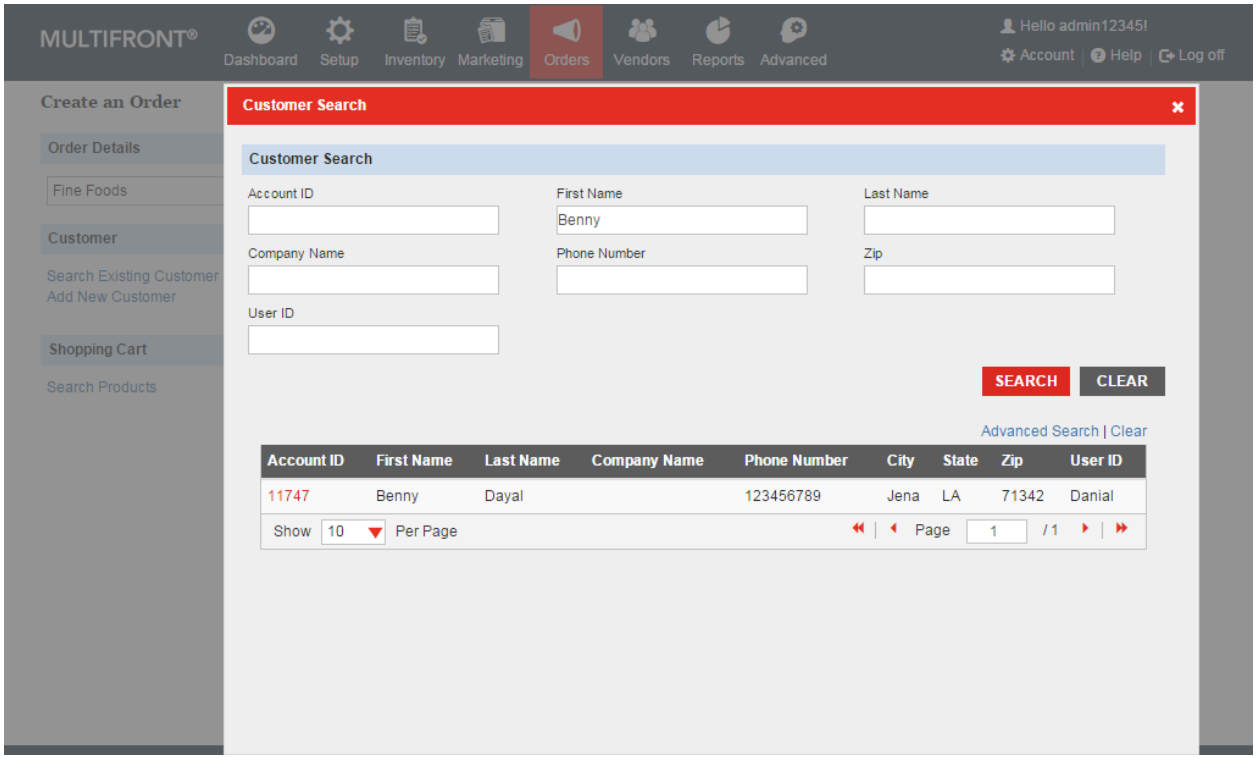
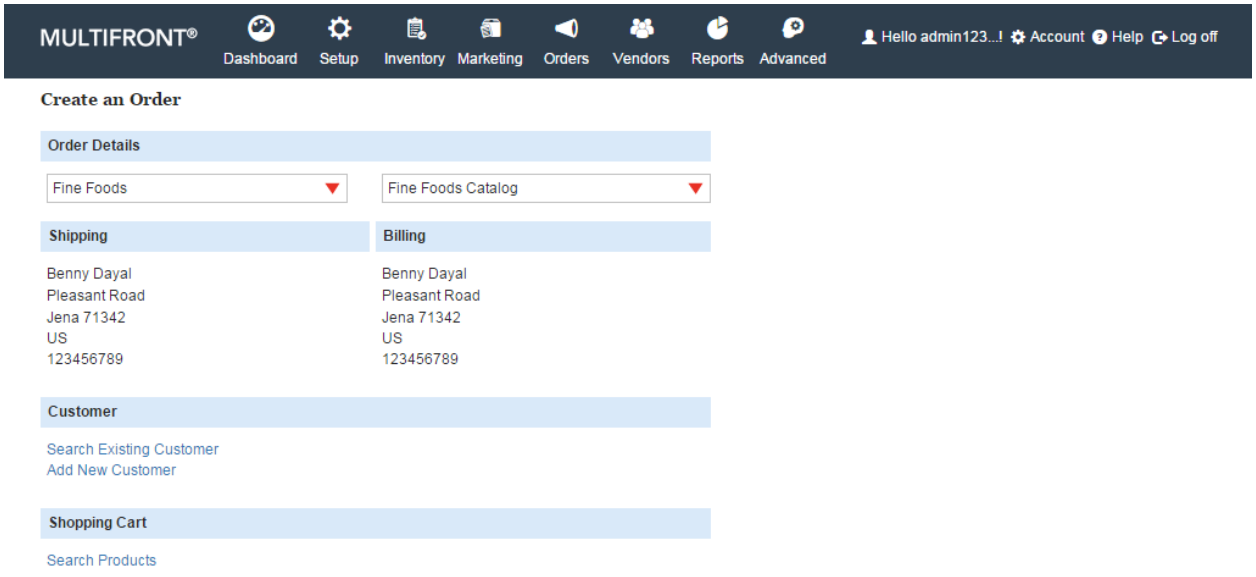


- Click Select on the customer you were searching for. The Create an Order is displayed with the customer's billing and shipping details.
- Click Edit Billing and Shipping Address to change the customer information. Else, proceed to step 4 to start ordering.



OR

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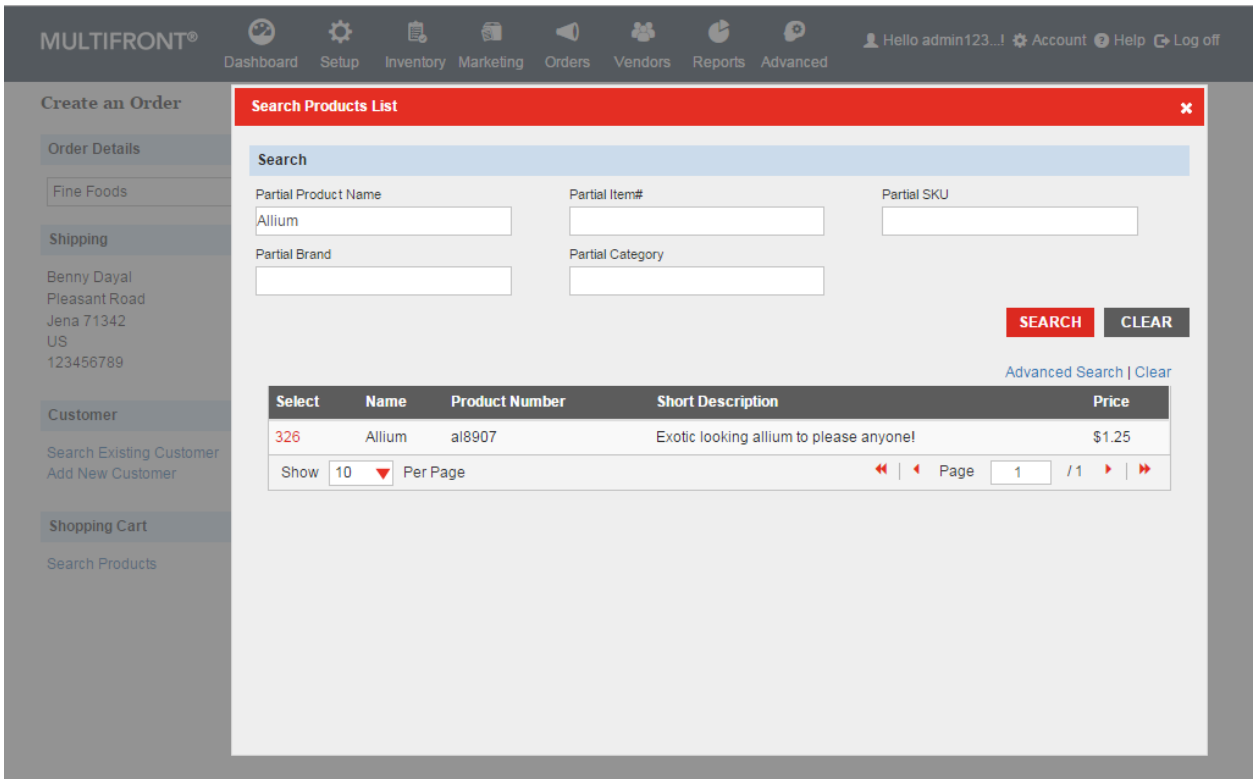
- To create a new customer:
  - Click Create a new customer. The Customer Account window is displayed.
  - Enter the billing and shipping address details for this customer.
  - Click Create an Account. The Create an Order is displayed with the new customer's billing and shipping details.
- To add products to the shopping cart:
  - Click Select products in the shopping cart. The Select Product window is displayed.
  - Enter any or all of the following keywords: Partial Product Name, Partial Item #, Partial SKU or Partial Category.



  - Click Search. All products meeting the above search criteria will be displayed.
  - Click Select on the product you want to order. The products options, price and description is displayed.

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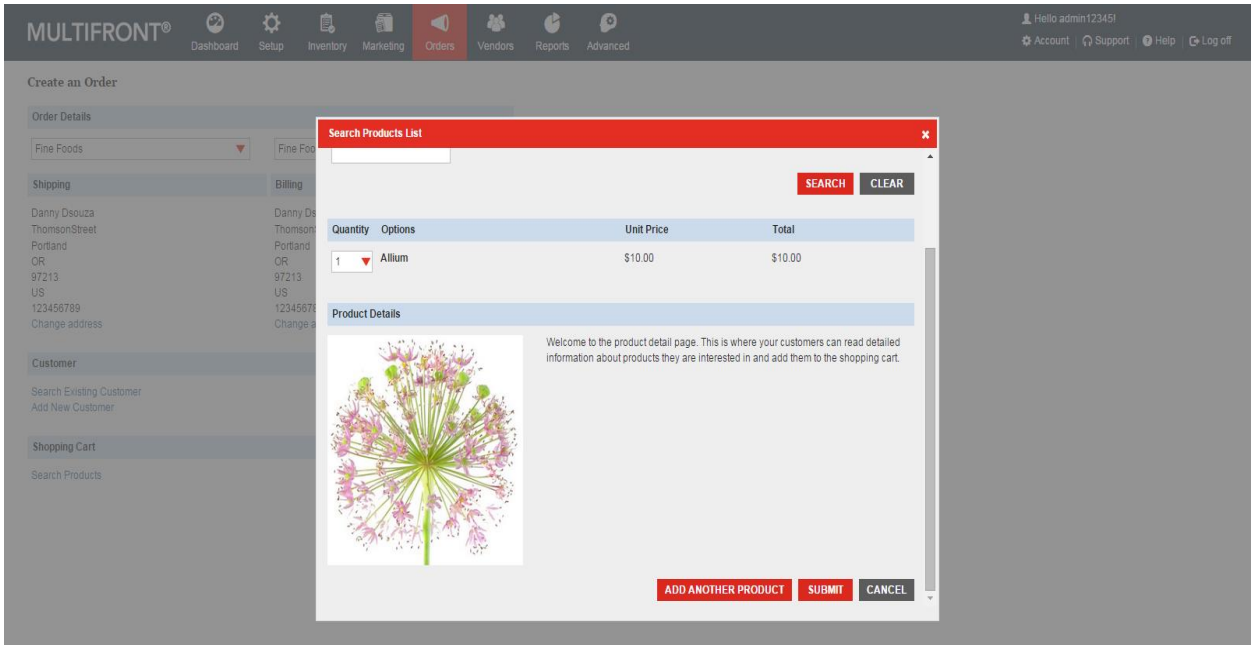
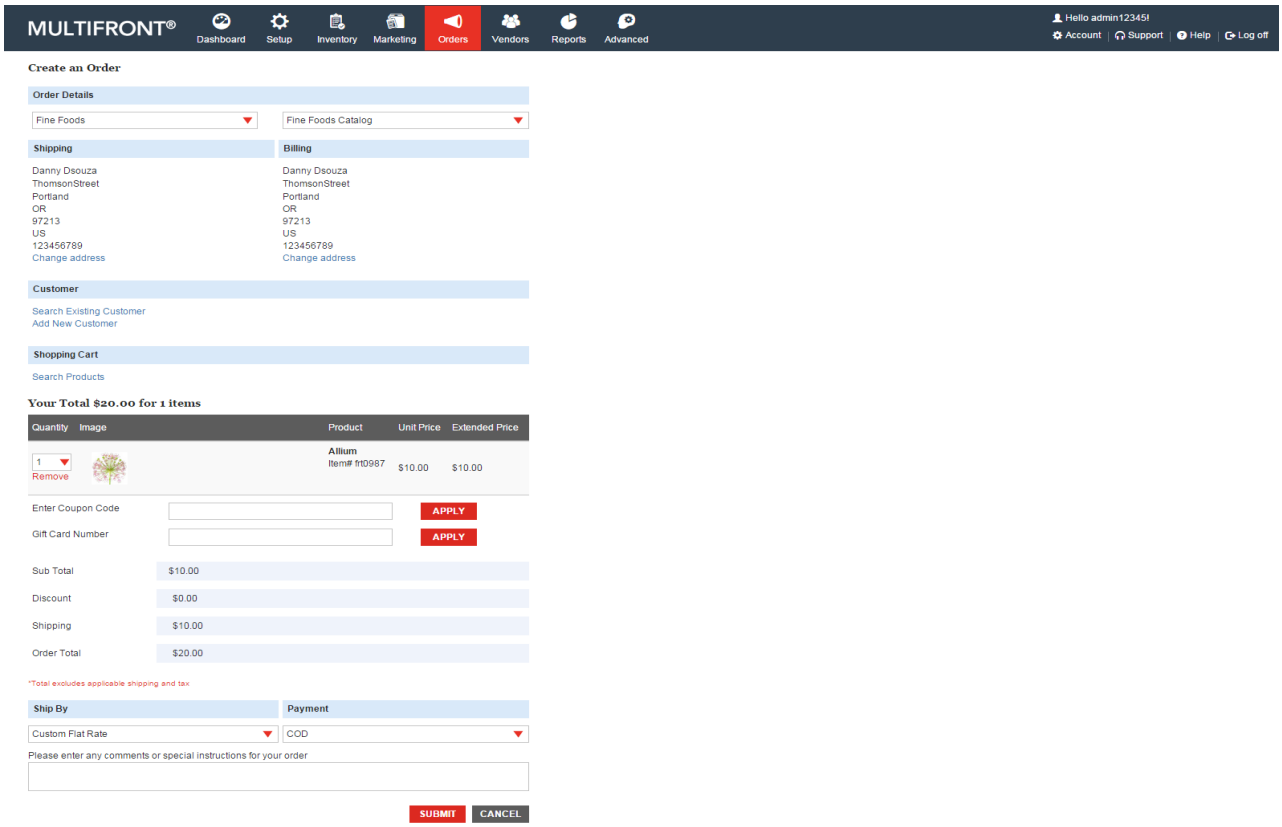


- Select the Quantity required and the Options from the drop-down list and click Submit. The Create an Order is displayed with the product added to the shopping cart.

- Repeat the above steps till all products required by the customer are added to the shopping cart.



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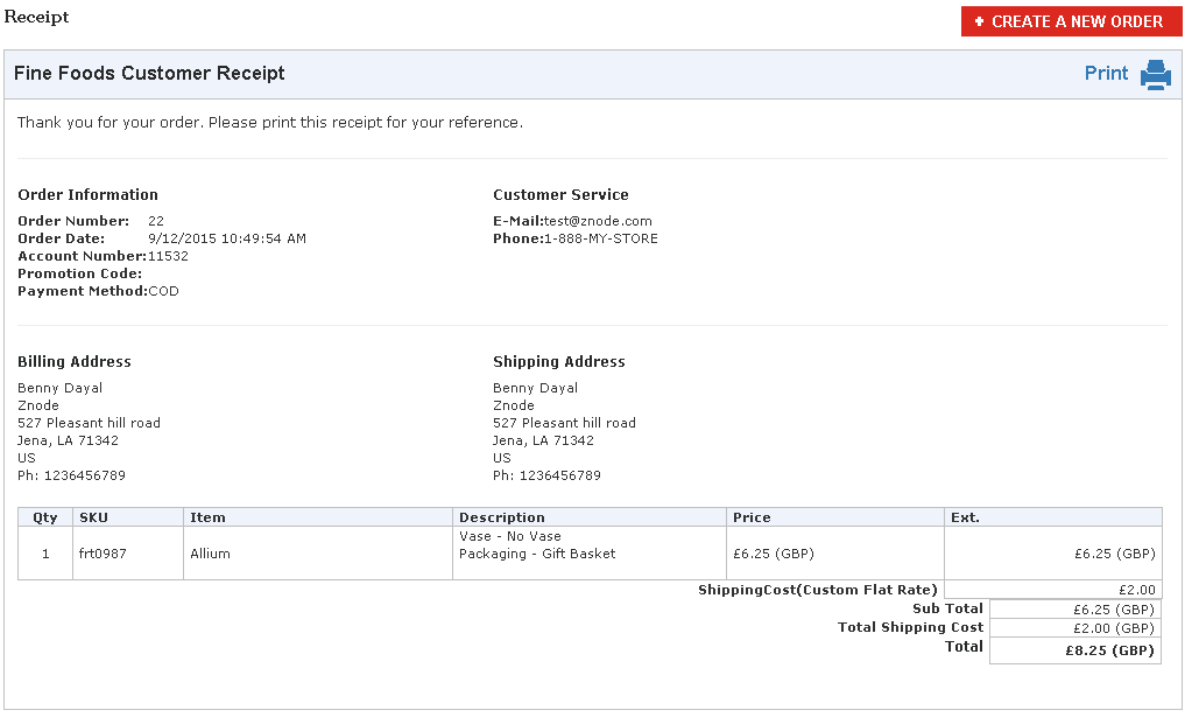
- Shipping Option: Select shipping option from the drop-down list.
- Payment Option: Select payment option from the drop-down list.
- For payment through Credit Card option, enter the following details:
- Card Number
- Expiration Date
- Security Code
- For payment through Purchase Order option, enter the following details:
- Purchase Order Number
- Enter any comments or special instructions related to this order in the text box.
- Click Submit Order. The Customer Receipt page is displayed listing all the order details.



Receipt

+ CREATE A NEW ORDER

Fine Foods Customer Receipt Print

Thank you for your order. Please print this receipt for your reference.

Order Information

Order Number: 22
Order Date: 9/12/2015 10:49:54 AM
Account Number:11532
Promotion Code:
Payment Method:COD

Customer Service

E-Mail:test@znode.com
Phone:1-888-MY-STORE

Billing Address

Benny Dayal
Znode
527 Pleasant hill road
Jena, LA 71342
US
Ph: 1236456789

Shipping Address

Benny Dayal
Znode
527 Pleasant hill road
Jena, LA 71342
US
Ph: 1236456789

Qty	SKU	Item	Description	Price	Ext.
1	frt0987	Allium	Vase - No Vase Packaging - Gift Basket	£6.25 (GBP)	£6.25 (GBP)
				ShippingCost(Custom Flat Rate)	£2.00
				Sub Total	£6.25 (GBP)
				Total Shipping Cost	£2.00 (GBP)
				Total	**£8.25 (GBP)**

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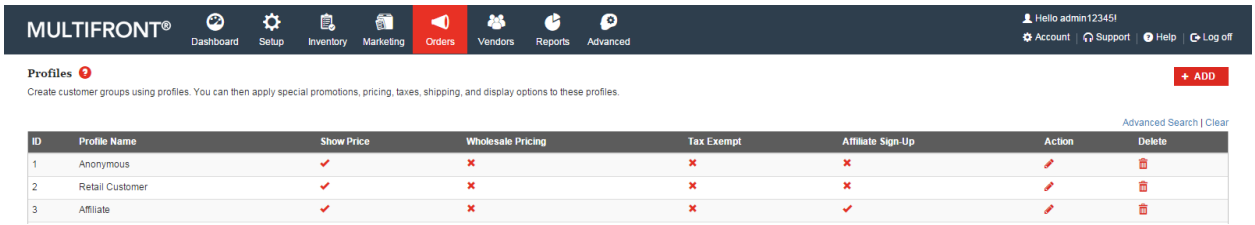
3.3 Profiles

The **Profiles** page allows the site administrator to add and manage the list of profiles in the storefront. Profiles can be associated with an Account, Pricing, Shipping, and Payment Options. This allows you to customize the storefront experience for each type of user that logs in.

3.3.1 View Profiles

To view the profiles in the storefront:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Profiles** under **Orders**. The **Profiles** page is displayed listing all the profiles in the storefront.



3.3.2 Add New Profile

To add a new profile:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Profiles** under **Orders**. The **Profiles** page is displayed listing all the profiles in the storefront.
3. Click **Add a New Profile**. The **Add a New Profile** page is displayed.
4. Enter the following details:
   - **Profile Name**: Enter a friendly name for the profile. You can then associate this profile with an account or a promotional campaign.
   - **Profile Code**: Enter a Profile Code. Internal profile code used by your ERP system.
   - **Weighting**: Enter a numeric weight for this profile. If an account has multiple profiles, then the profile with the higher weight will take precedence.
   - **Display product price for this profile**: Select to show catalog pricing for this profile. Orders can't be placed if unchecked. If you wish to hide pricing for this profile, you must also disable pricing for the Anonymous Profile for obvious reasons.
   - **Enable wholesale price for this profile**: Select to use wholesale price for this profile.

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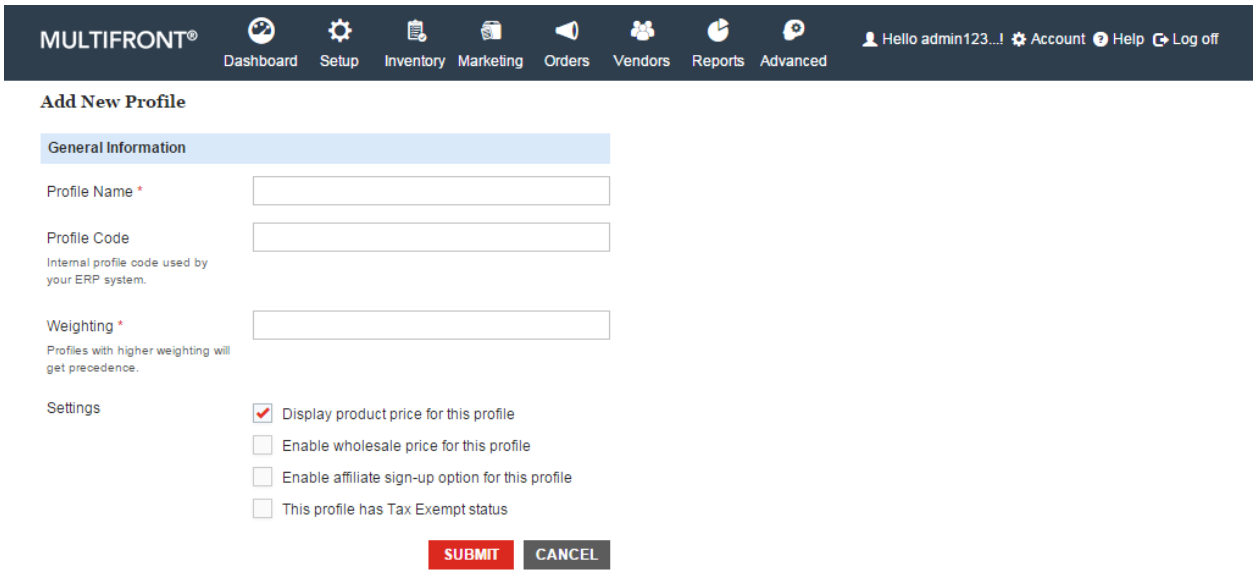
- **Enable affiliate sign-up option for this profile**: Select to display this profile as an option on the Partner Sign-Up page.
- **This profile has Tax Exempt status**: Select to not add taxes to this profiles purchases.

5. Click **Submit**. The **Profiles** page is displayed listing the newly added profile.



3.3.3 Edit Profile

To edit a profile:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Profiles** under **Orders**. The **Profiles** page is displayed listing all the profiles in the storefront.
3. Click **Edit** on the profile that you want to edit. The **Edit Profile** page is displayed.
4. Edit the following details:
   - **Profile Name**: Edit the name for the profile.
   - **Profile Code**: Enter a Profile Code. Internal profile code used by your ERP system.
   - **Weighting**: Enter a numeric weight for this profile. If an account has multiple profiles, then the profile with the higher weight will take precedence.
   - **Display product price for this profile**: Select to show catalog pricing for this profile.

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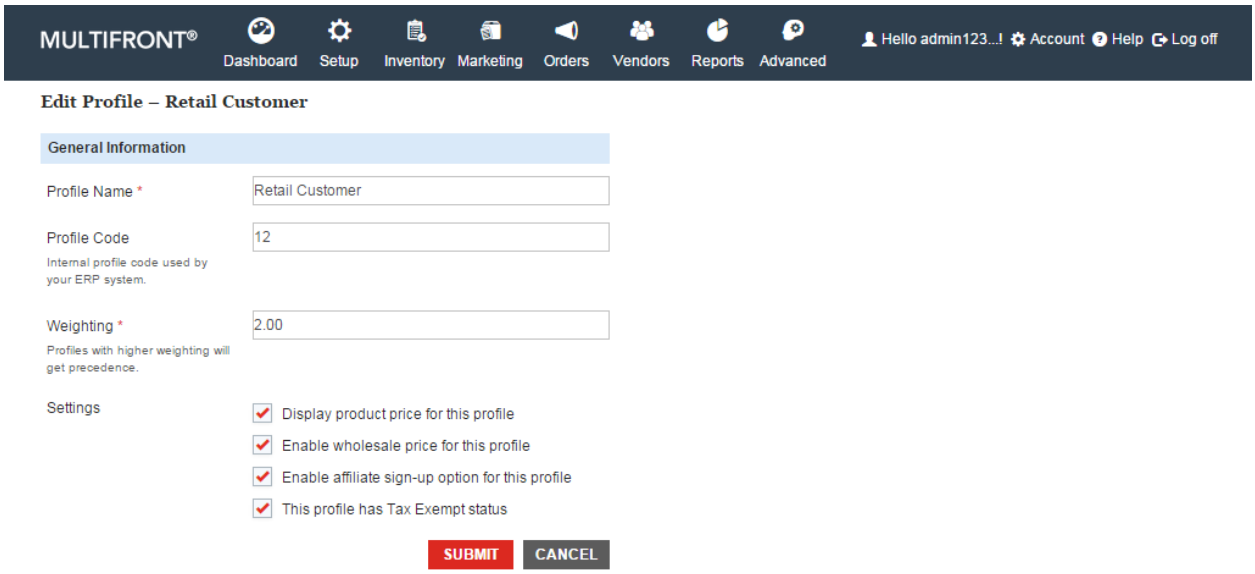
Orders can't be placed if unchecked. If you wish to hide pricing for this profile, you must also disable pricing for the Anonymous Profile for obvious reasons.

- **Enable wholesale price for this profile**: Select to use wholesale price for this profile.
- **Enable affiliate sign-up option for this profile**: Select to display this profile as an option on the Partner Sign-Up page.
- **This profile has Tax Exempt status**: Select to not add taxes to this profiles purchases.

5. Click **Submit**. The **Profiles** page is displayed listing all the profiles.



3.3.4 Delete Profile

To delete a profile:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Profiles** under **Orders**. The **Profiles** page is displayed listing all the profiles in the storefront.
3. Click **Delete** on the profile that you want to delete. **Please Confirm** page is displayed.
4. Click **Delete** to confirm. The **Profiles** page is displayed with the deleted profile removed from the list.

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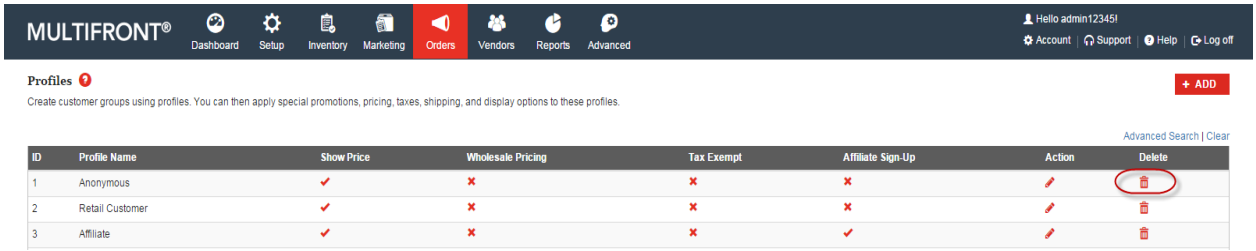

3.4 Customers

Customers page allows you to manage the customer's account information.

3.4.1 Search and View Customer

To search for and view customer accounts:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Customers** under **Orders**. The **Customers** page is displayed listing all registered customers in the database.
3. To search for a customer account:
   - **Store Name**: Select a store name from the drop-down list.
   - **Search Account**: Enter a keyword. This can be a partial First Name, Last Name, Company Name, Login Name, Account Number, Contact ID, Phone Number and Email ID.
   - **Select a Profile**: Select the profile from the drop-down list.
   - **Start Date**: Enter the start date in MM/DD/YYYY format OR click the calendar button beside the date box to set the date.
   - **End Date**: Enter the end date in MM/DD/YYYY format OR click the calendar button beside the date box to set the date.
   - **Affiliate Approval Status**: Select the affiliate approval status from the drop-down list.
   - Click **Search**. All accounts matching the search criteria will be displayed under **Customer List**.
4. Click **Manage** on the account to view its details. The **Customer Details** page is displayed listing the customer details.

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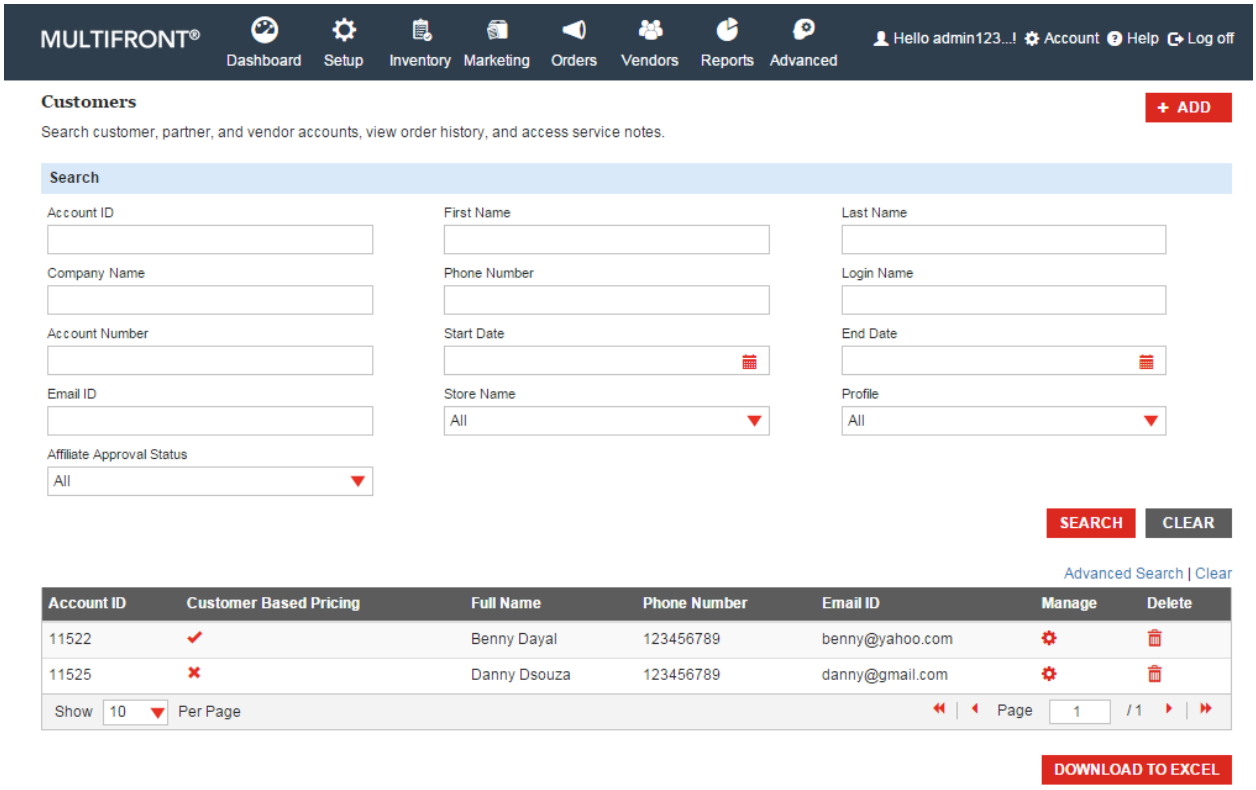

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3.4.2 Add Customer

To add the customer account:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Customers** under **Orders**. The **Customers** page is displayed listing all registered customers in the database.
3. To add the customer account following details must be necessary:

- **External ID**: Enter the external id and you can leave blank if it is not applicable.
- **Customer Based Pricing Enable**: If this is **Enable** anonymous price will be display
- **User ID:** Enter Number/character or anything in the User ID fields. when you want to login the website this user id is useful for that time.
- **Email Address:** Enter the valid Email Address. Temporary password is coming to the entered email id.
- **Company Name**: Enter company name. Leave blank if it is not necessary.
- **Website**: Enter a website. Leave blank if it is not necessary.
- **Source**: Leave blank if it is not necessary.
- **Cusom1**: Leave blank if it is not necessary.
- **Custom2**: Leave blank if it is not necessary.
- **Custom3**: Leave blank if it is not necessary.
- **Description**: Leave blank if it is not necessary.

4. Click on the **submit** button, New customer account is created and it is display in the Customer list.

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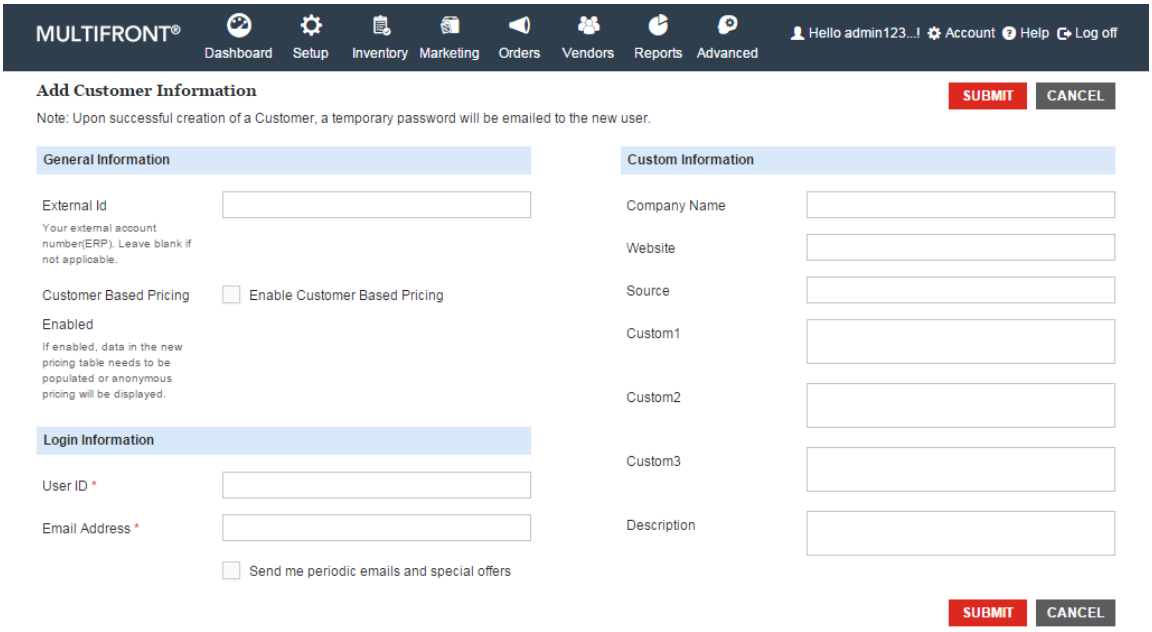

3.4.3 Edit Customer

To Edit Customer Information:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Customers** under **Orders**. The **Customers** page is displayed listing all registered customers in the database.
3. Click on the Manage link of any customer
4. Edit customer page is display with General, Order, Notes, Profiles, Affiliate and customer based pricing tab
5. To Edit the Customer information click on the Edit Account button.
6. Edit below details from Edit Customer page:

- **External ID**: Edit the external id and you can leave blank if it is not applicable.
- **Customer Based Pricing Enable**: Edit the Customer Based Pricing Enable checkbox, If this is **Enable** anonymous price will be display
- **User ID:** This fields is in disable mode. You can not edit the User ID field
- **Reset Password:** while Clicking on the submit button temporary password will be send to the Customer Email ID.
- **Email Address:** Edit the valid Email Address. Temporary password is coming to the entered email id.
- **Company Name**: Edit company name. Leave blank if it is not necessary.
- **Website**: Edit a website. Leave blank if it is not necessary.

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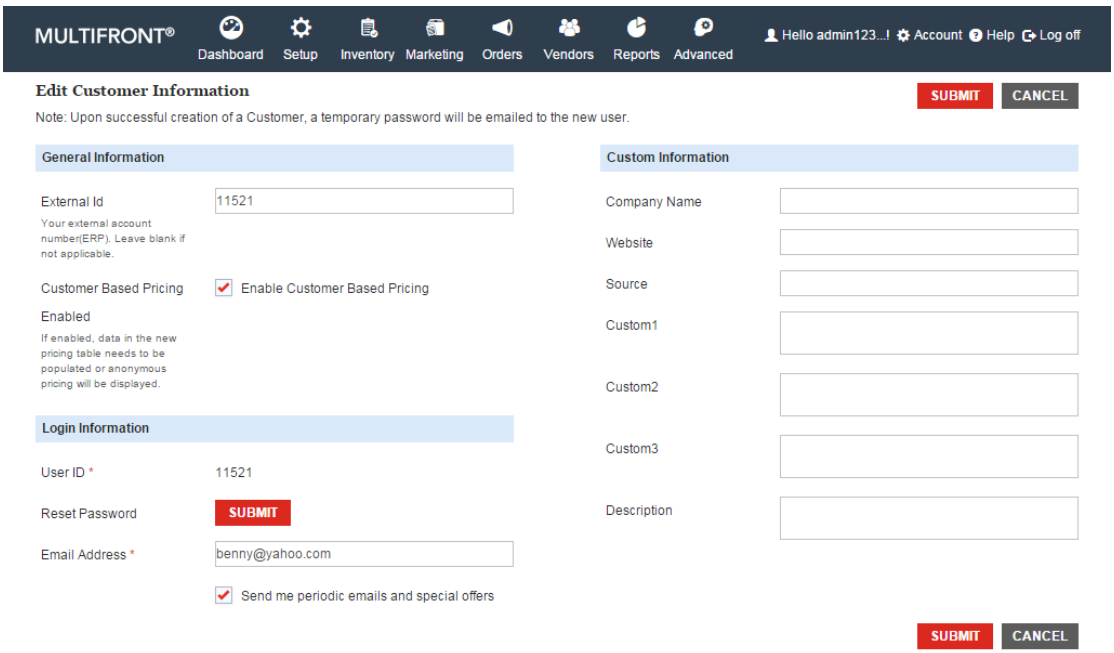
- **Source**: Leave blank if it is not necessary.
- **Cusom1**: Leave blank if it is not necessary.
- **Custom2**: Leave blank if it is not necessary.
- **Custom3**: Leave blank if it is not necessary.
- **Description**: Leave blank if it is not necessary.

7. Click on the submit button. All the details is save and updated details is display in the General tab page



8. Click on the Add New Address button from the Edit Account page. Add a Address page is display

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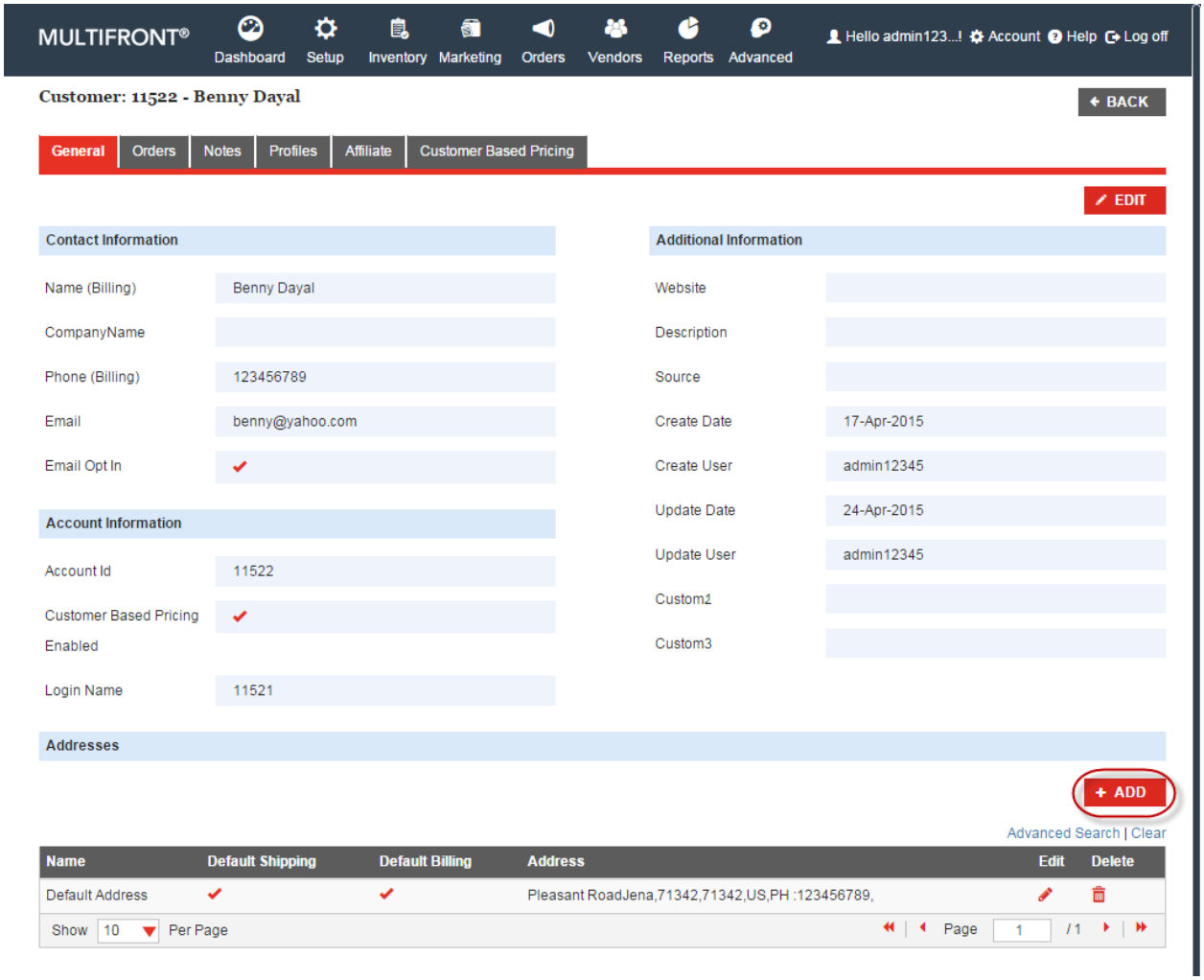

9. To Add the New address following fields need to enter:

- **Address Name**: Enter the Address name
- **First Name**: Enter the First Name.
- **Last Name**: Enter the Last Name
- **Company Name**: Enter the Company Name. Leave blank if it is not necessary.
- **Street Name1**: Enter your full valid Address
- **Street Name2**: Enter your full valid Address
- **City:** Enter the city name
- **State:** Enter the State.
- **Postal Code:** Enter your valid postal name.
- **Country:** Select any country from the drop down.
- **Phone Number:** Enter the Mobile/Landline Number.

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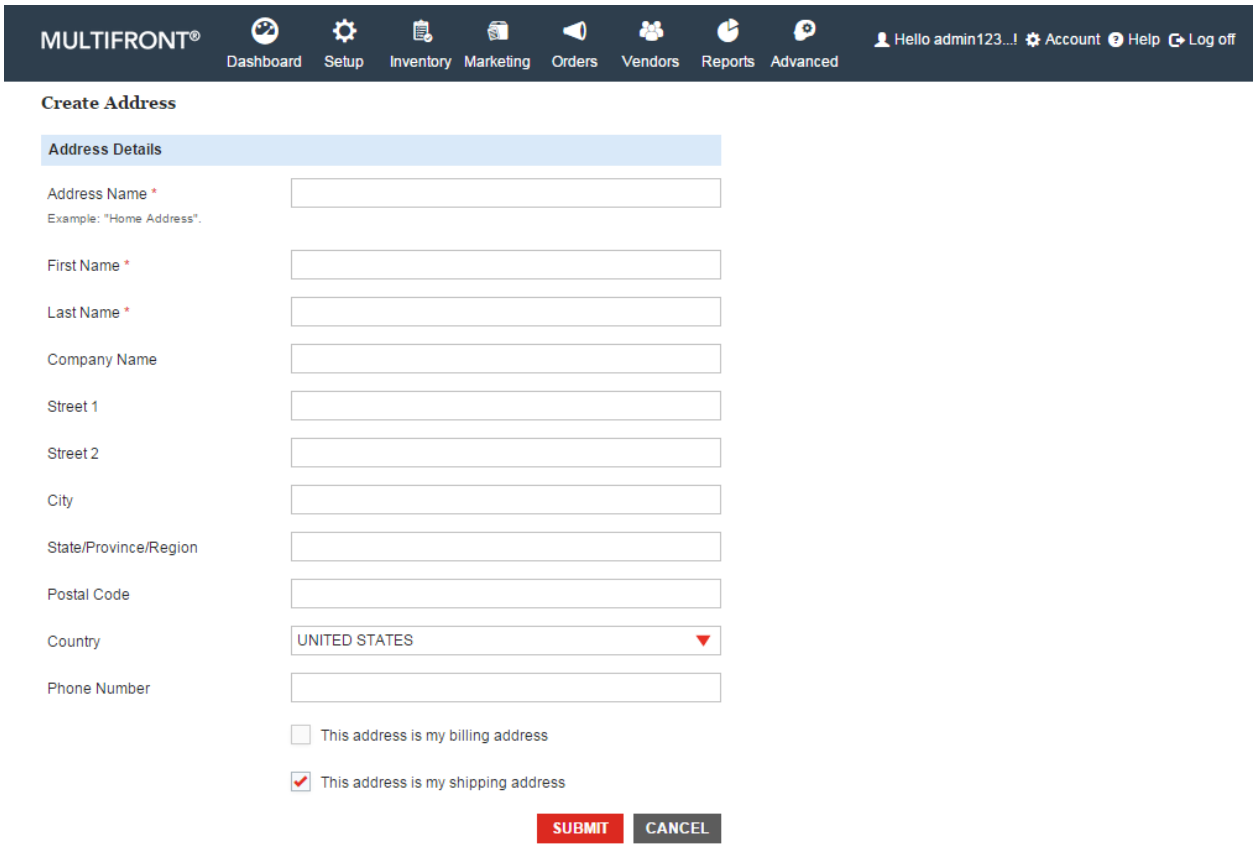
- **Checkboxes:** If both the check boxes are in Enable mode so your present address will be both Billing and Shipping address

10. Click on the Save button. New Address is display in the address grid.



11. Click on the Edit link of any address. Edit page is display
12. Update below details:

- **First Name**: Update the First Name.
- **Last Name**: Update the Last Name
- **Company Name**: Update the Company Name. Leave blank if it is not necessary.
- **Street Name1**: Update your full valid Address
- **Street Name2**: Update your full valid Address
- **City:** Update the city name.
- **State:** Update the State.
- **Postal Code:** Enter your valid postal name.
- **Country:** Select any country from the drop down.
- **Phone Number:** Update the Mobile/Landline Number.
- **Checkboxes:** If both the check boxes are in Enable mode so your present address will be both Billing and Shipping address

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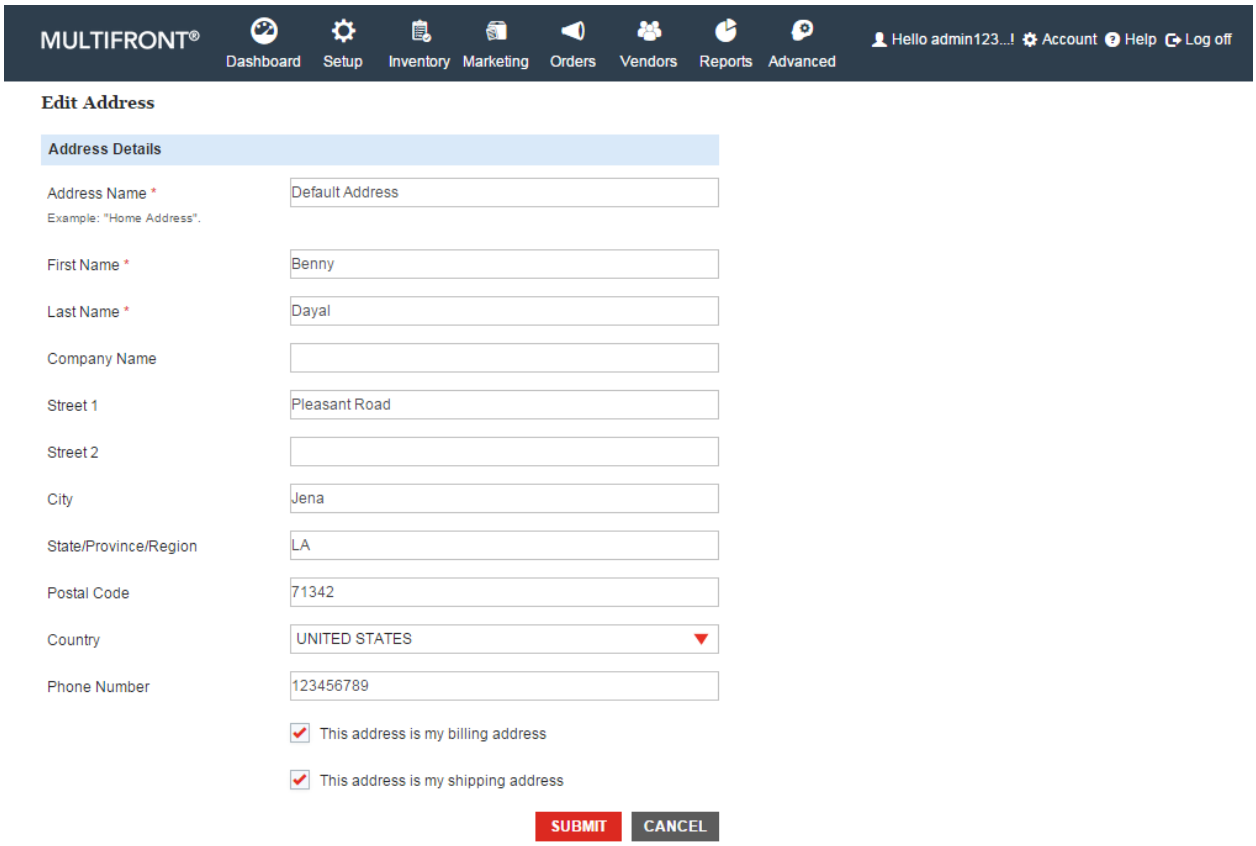
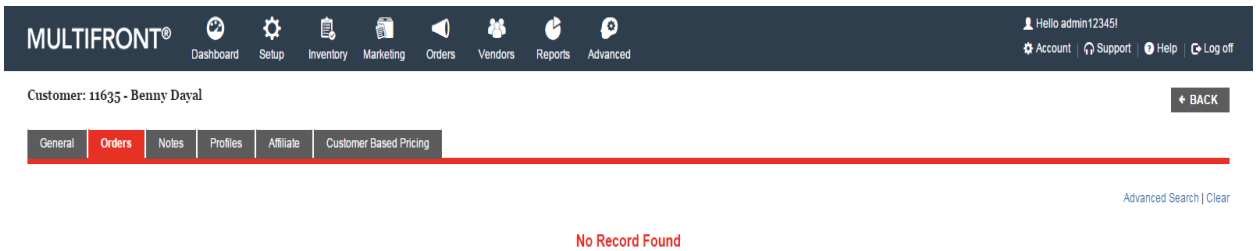
13. Click on the submit button, Updated address is display in the address grid.



3.4.3.1 Order tab

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Customers** under **Orders**. The **Customers** page is displayed listing all registered customers in the database.
3. Click on the Manage link of any customer
4. Edit customer page is display with General, Order, Notes, Profiles, Affiliate and customer based pricing tab
5. Select Order tab from the top
6. All the order history with status is display in this section.



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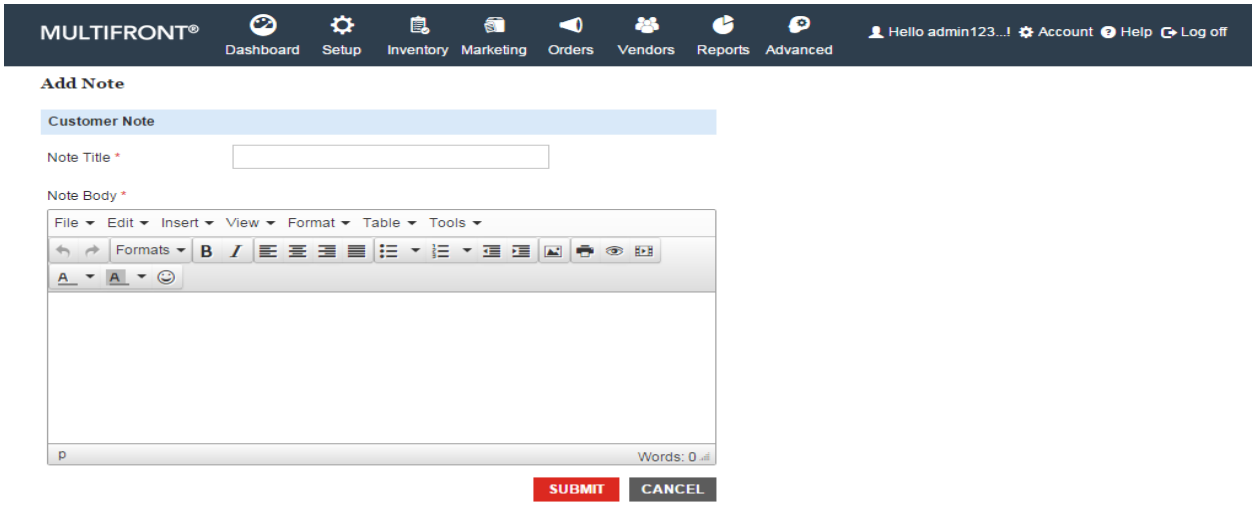
3.4.3.2 Notes tab

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Customers** under **Orders**. The **Customers** page is displayed listing all registered customers in the database.
3. Click on the Manage link of any customer
4. Edit customer page is display with General, Order, Notes, Profiles, Affiliate and customer based pricing tab
5. Select Notes tab and click on the Add Note button.
6. To add the any notes below details is necessary:

- **Note Title**: Enter title for your note.
- **Note Body:** Enter the description for the notes

7. Click on the Submit button. New note is display in the Note tab



3.4.3.3 Profiles Tab

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Customers** under **Orders**. The **Customers** page is displayed listing all registered customers in the database.
3. Click on the Manage link of any customer
4. Edit customer page is display with General, Order, Notes, Profiles, Affiliate and customer based pricing tab
5. Click on the Profiles tab. Profile page is display with Associate Profile button.

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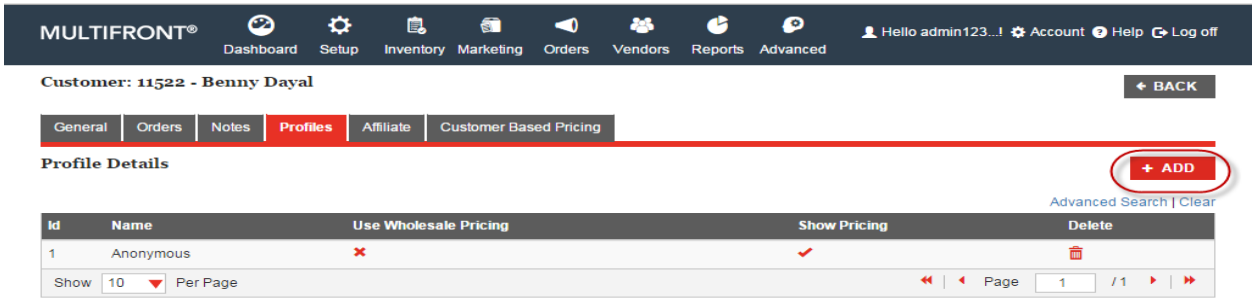
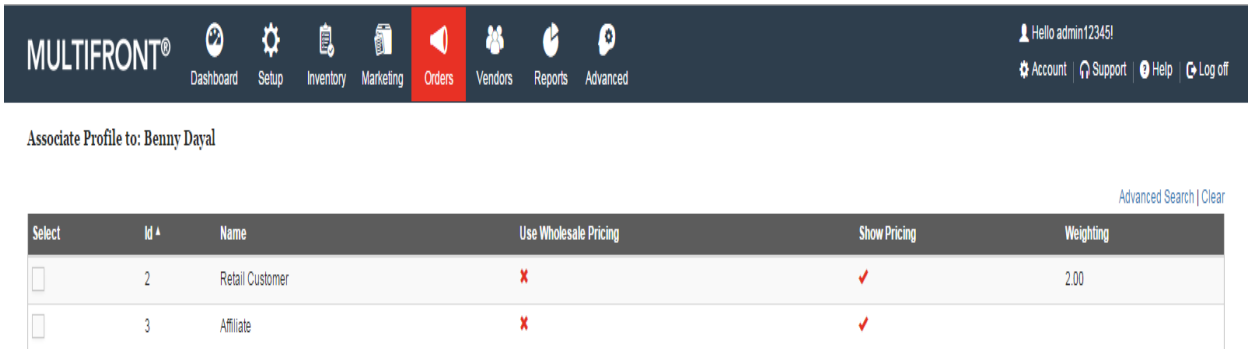
6. Click on the Associate Profile button, Associate Profile to <Customer Name> page is display.





7. Select the Profile checkbox and click on the Submit button.
8. Associate Profile is display in the Grid.
9. Click on the Remove link. Selected profile is removed from the grid.

3.4.3.4 **Affiliate Tab**

Affiliate marketing is a type of performance-based marketing in which a business rewards one or more affiliates for each visitor or customer brought by the affiliate's own marketing efforts.

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Customers** under **Orders**. The **Customers** page is displayed listing all registered customers in the database.
3. Click on the Manage link of any customer

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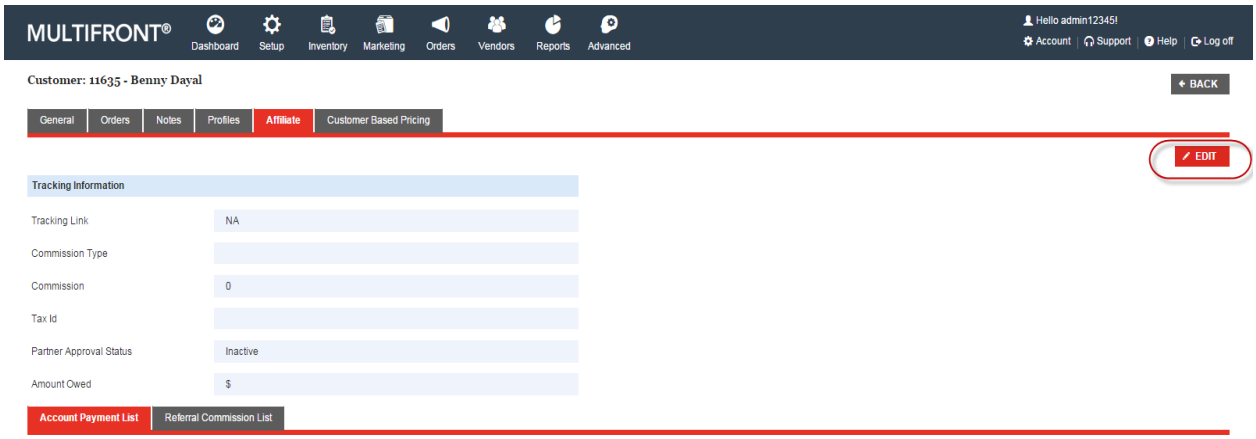
4. Edit customer page is display with General, Order, Notes, Profiles, Affiliate and customer based pricing tab.
5. Click on the Affiliate tab.



6. Click on the Edit Tracking button. Edit Tracking page is display.
7. Enter the Below details.
    - **Commission Type:** Select commission type from the drop down and enter the Percent/Amount in the fields
    - **Tax ID:** Enter the Tax ID. Leave blank if it is not necessary
    - **Payment Approval Status:** Select approval status as approve.URL is generated in the Tracking link fields.

8. Click on the save button. All the information is display in the Affiliate tab page.
9. If the generated link is use by the other customer then the commission is save in the Referral Commission section

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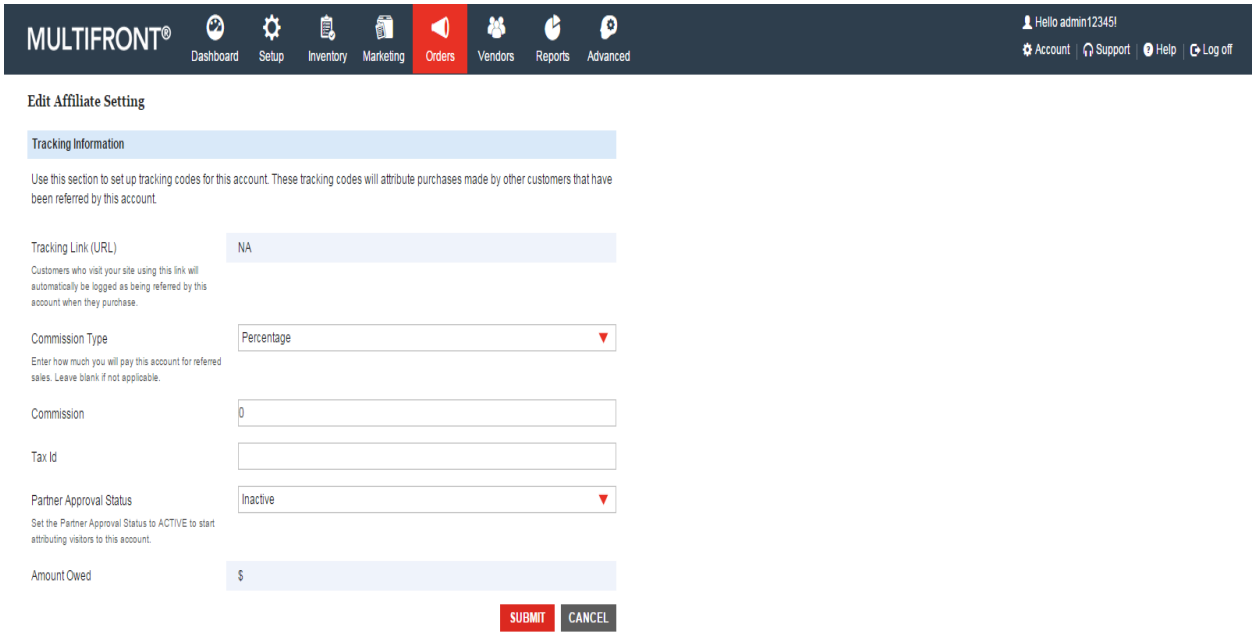

3.4.3.5 **Customer Based Pricing Tab**

To Search the Product List, following details is required:

- **All Store**: Select any store name from the drop down.
- **SKU**: Enter the SKU of any product. Keep all other blank and if it is not in use
- **External Product Code:** Enter the External product code. Keep all other blank and if it is not in use
- **Product Name:** Enter the Product Name. Keep all other blank and if it is not in use
- **Product Category:** Enter the Product Category. Keep all other blank and if it is not in use.
- **Product Brands:** Select any brands from the drop dow

1. Click on the Search button, All the Product list is display in the customer based pricing product list.
2. Click on the Down to Excel button. Excel sheet is open with all the product list.

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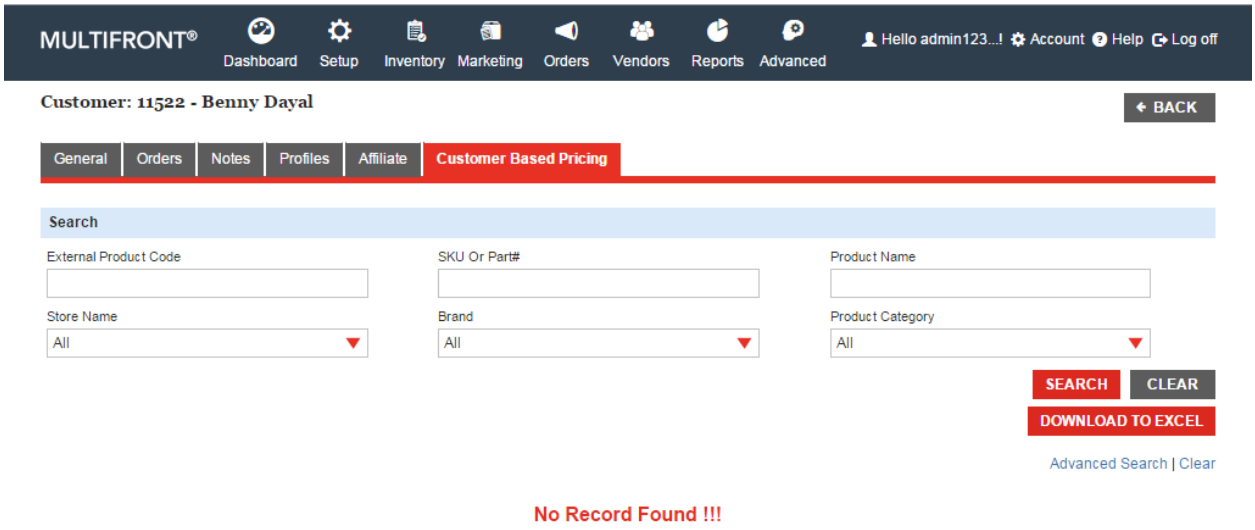

3.4.4 Delete Customer

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Customers** under **Orders**. The **Customers** page is displayed listing all registered customers in the database.
3. Click on the Delete link of ant Customer.
4. Confirmation message is display
5. Click on the Delete link, selected customer is removed from the customer list

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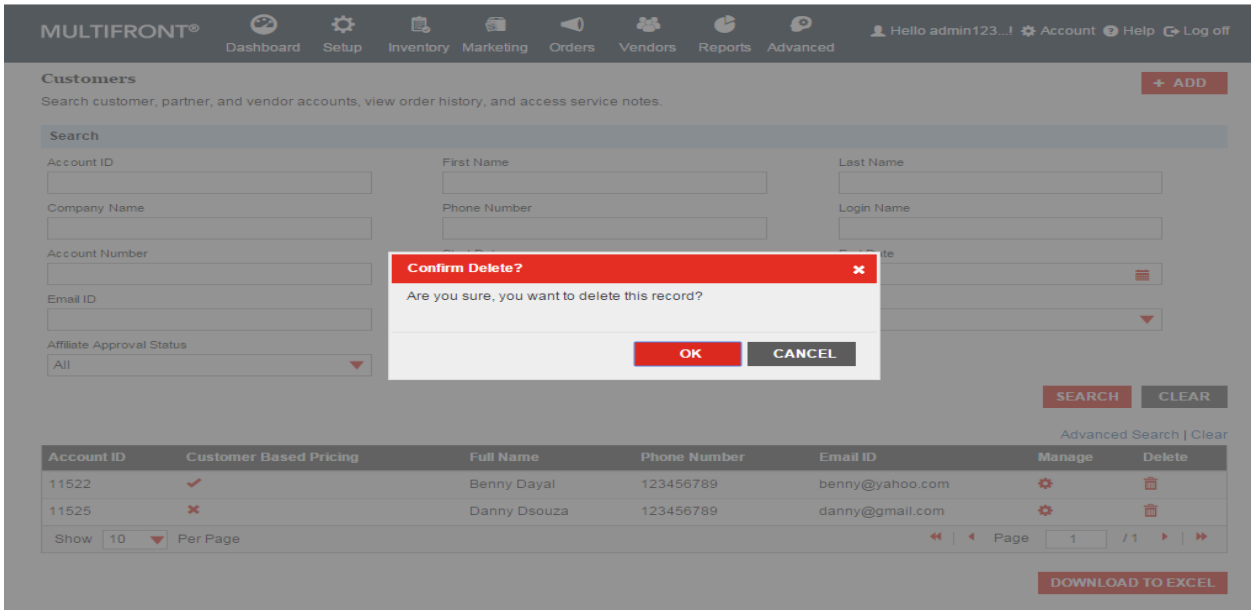

3.4.5 Download customer information to Excel

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Customers** under **Orders**. The **Customers** page is displayed listing all registered customers in the database.
3. Click on the Download to Excel button. All the Customer list is display in the excel format.

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3.5 Service Requests

Service Requests page allows you to manage customer service requests submitted using the Contact-Us form, respond to them via email as well as take notes. You can also create service requests manually. A running history of your contact with customers is kept.

Service requests can either be created by the customer submitting a Contact-Us form or by a customer service representative, manually entering the request using the Create a New Service Request page.

3.5.1 Search and View Service Request

To search and view service requests:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Service Requests** under **Orders**. The **Service Requests** page is displayed listing all cases in the database.
3. To search for service requests, under the **Search Service Requests** section, enter any or all of the following:
   - **Store Name**: Select a store name from the drop-down list.
   - **Search Keyword**: Enter a keyword. This can be a partial Case ID, Title, First Name, Last Name or Company name.
   - **Case Status**: Select a status for this case. Leave at **All**, if unsure.
   - Click **Search**. All cases meeting the above search criteria will be displayed under **Service Request List**.
4. Click **Manage** on the service request to view its details. The **Case** page is displayed listing the case information, customer information and notes.

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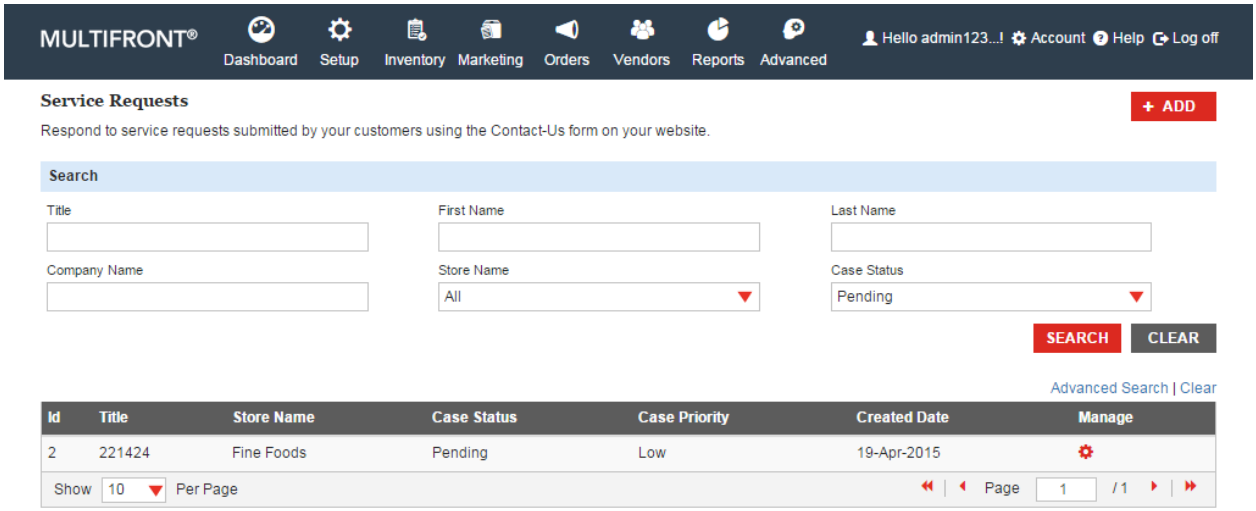

3.5.2 Create Service Request

Service Requests can be entered into the system in two ways. The first is for a customer to

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submit a Contact Us form. The second is for you to manually enter a service request using the admin page. This option is useful to log contacts with customers that call in to your company for help.

To add a new service request:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Service Requests** under **Orders**. The **Service Requests** page is displayed.
3. Click **Create Service Request** to add a new service request. **Create a New Service Request** page is displayed.
4. Enter the following details:
   - **First Name**: Enter the customer's first name.
   - **Last Name**: Enter the customer's last name.
   - **Company Name**: Enter the company name. This is optional.
   - **Email ID**: Enter the email address.
   - **Phone Number**: Enter the customer's phone number.
   - **Stores**: Select a store name from the drop-down list.
   - **Status**: Select the status of this case from the drop-down box.
   - **Priority**: Select the priority of this case from the drop-down box.
   - **Title**: Enter a title for this case.
   - **Message**: Enter a description for this case.
5. Click **Submit**. The **Service Requests** page is displayed listing the newly created service request.

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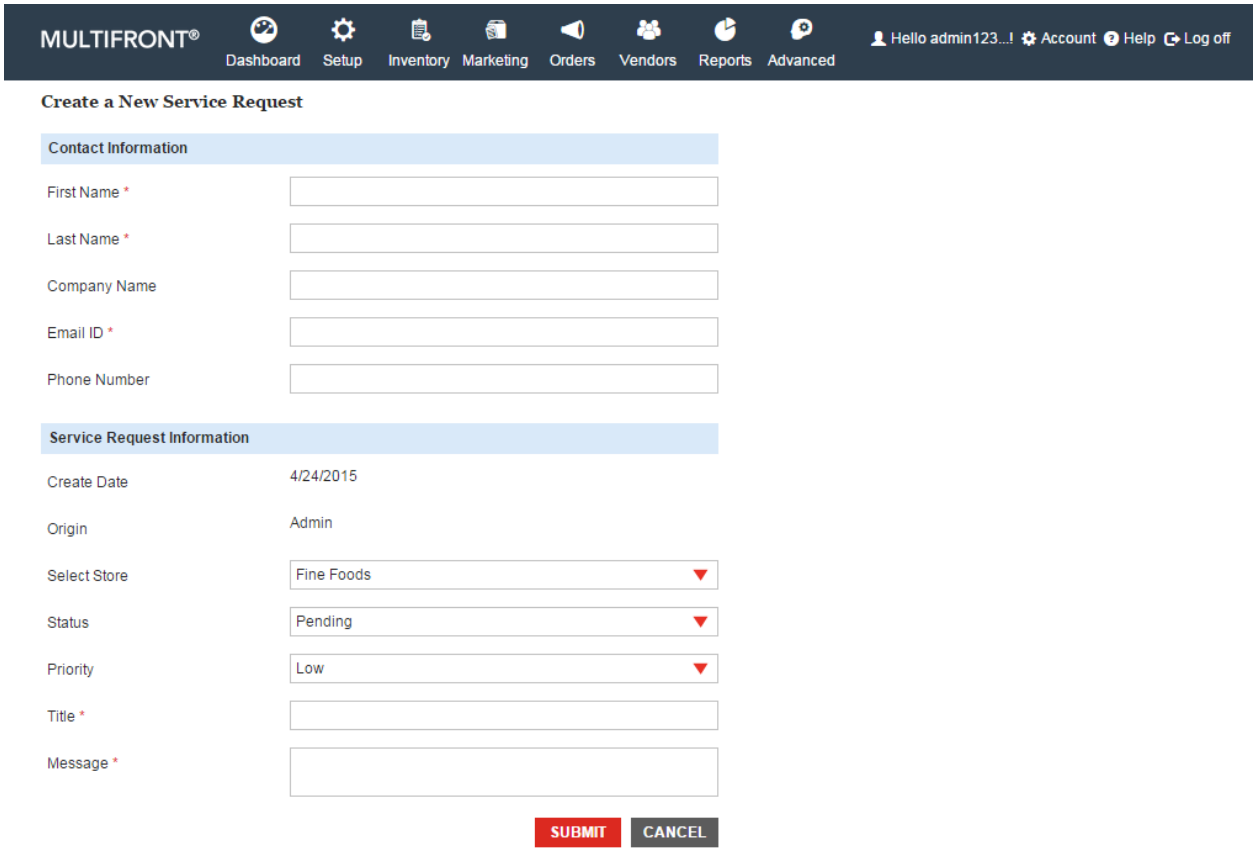

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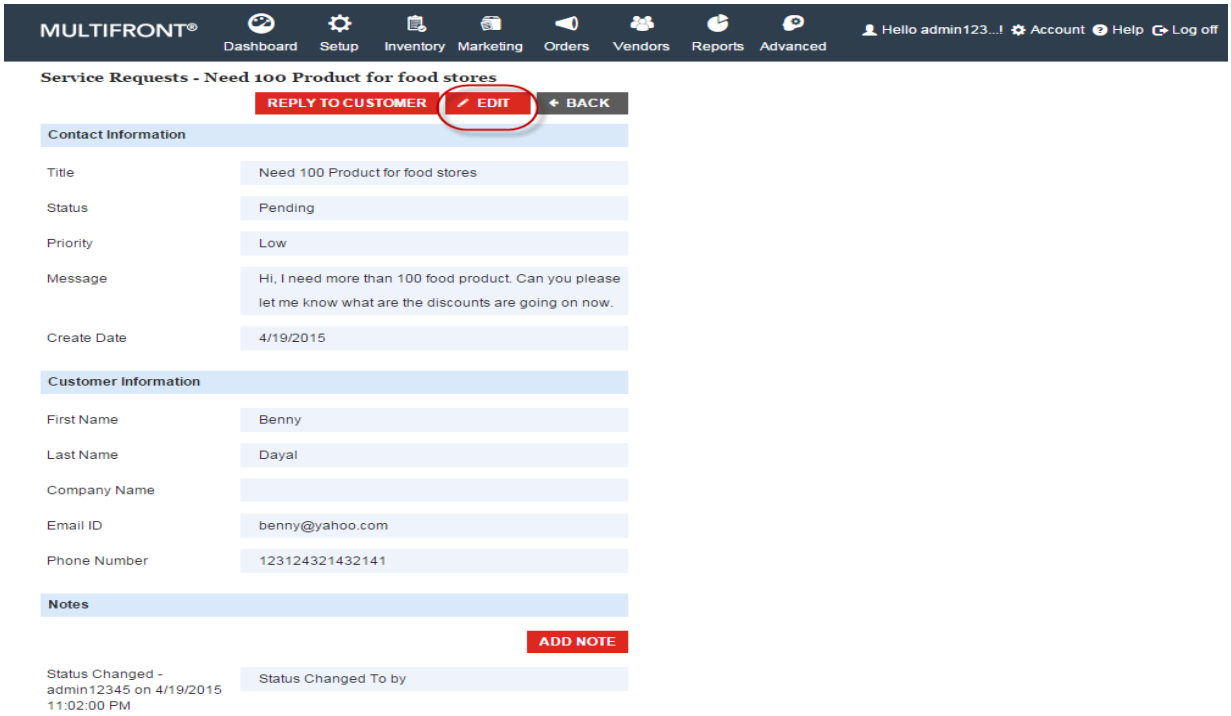
3.5.3 Edit Service Request

To edit a service request:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Service Requests** under **Orders**. The **Service Requests** page is displayed listing all service requests in the database.
3. Click **Edit** on the service request you want to edit. **Edit Service Request** page is displayed.
4. Enter the following details:
   - **First Name**: Edit the customer's first name.
   - **Last Name**: Edit the customer's last name.
   - **Company Name**: Edit the company name. This is optional.
   - **Email ID**: Edit the email address.
   - **Phone Number**: Edit the customer's phone number.
   - **Stores**: Select a store name from the drop-down list.
   - **Status**: Change the status of this case.
   - **Priority**: Change the priority of this case.
   - **Title**: Edit the title for this case.
   - **Description**: Edit the description for this case.
5. Click **Submit**. The **Service Requests** page is displayed after updating the edited details.



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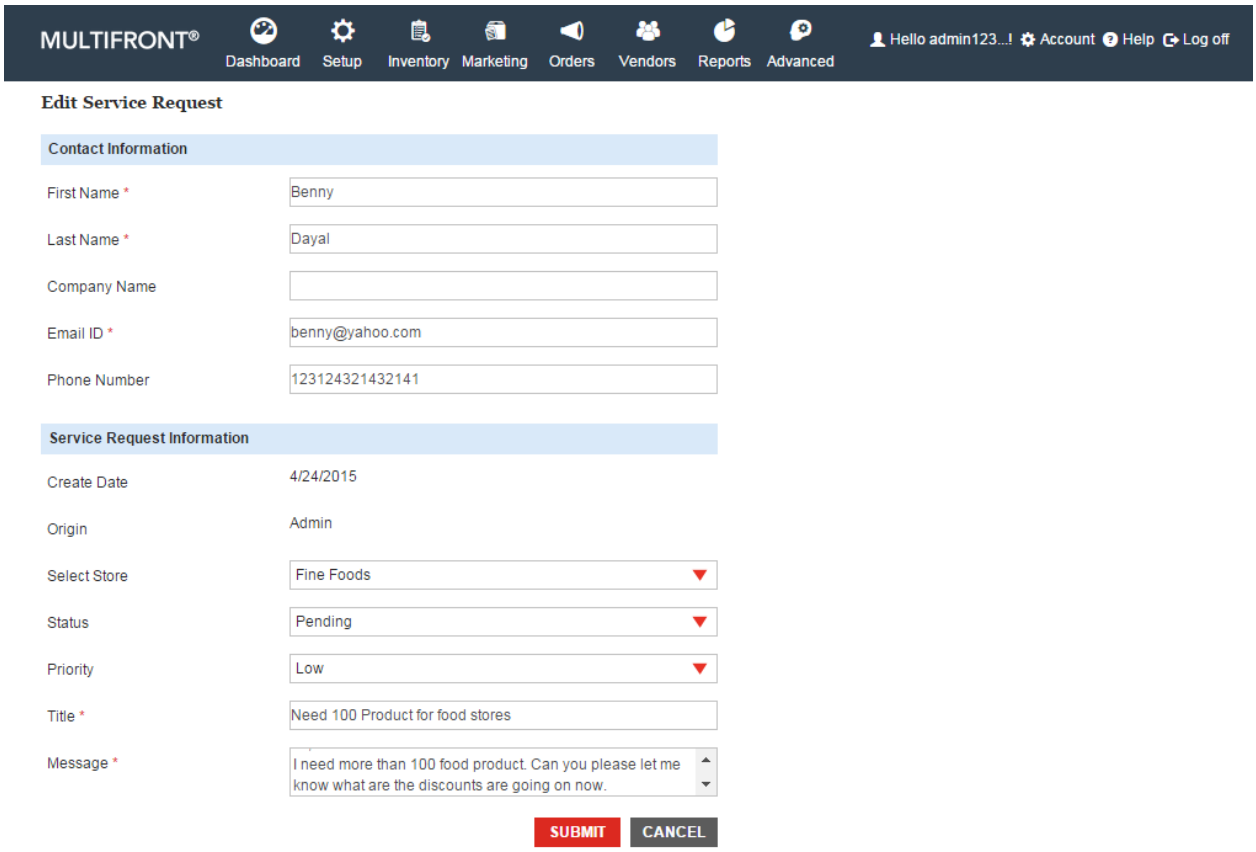

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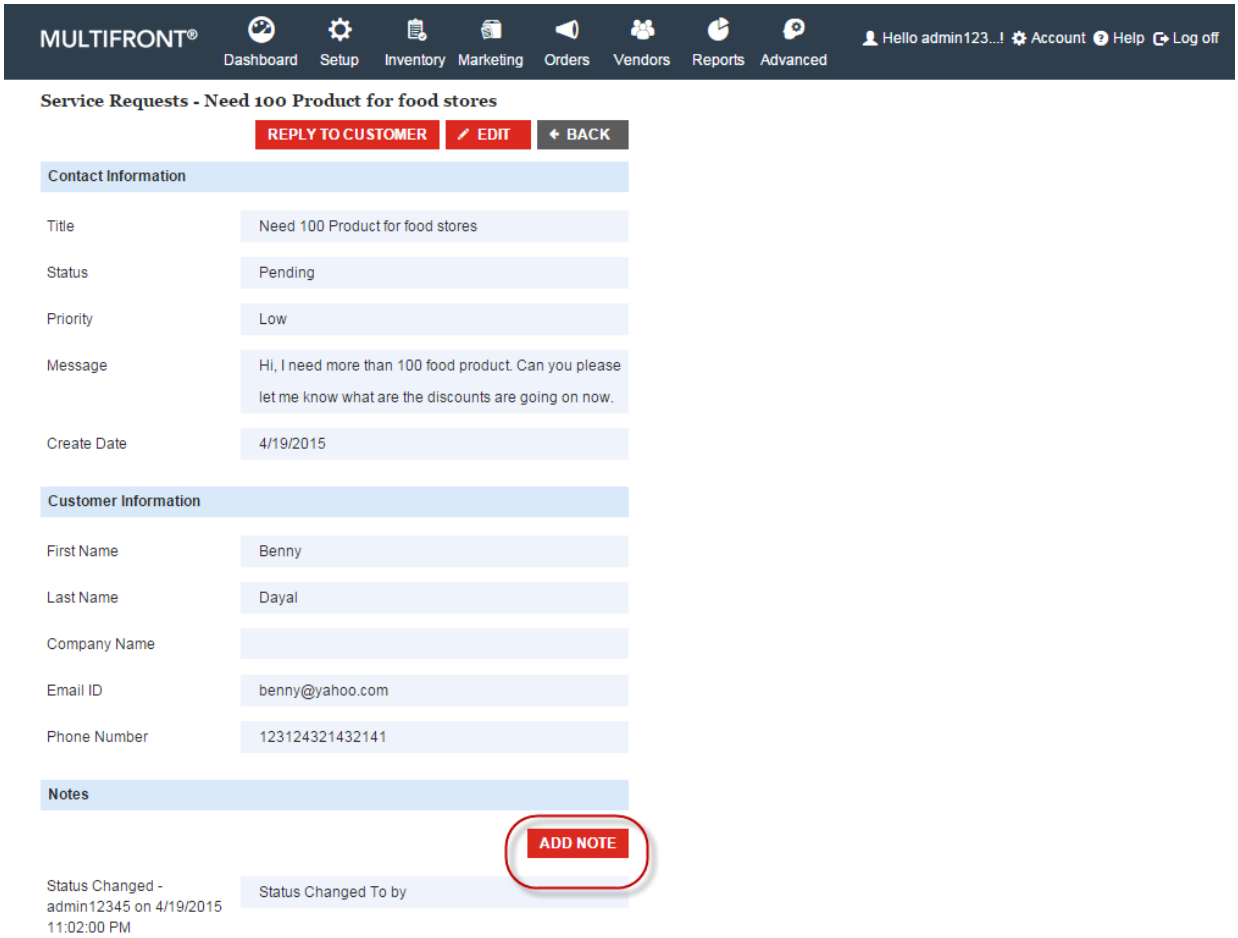
3.5.4 Add Note to a Service Request

You can record any number of notes for a service request. Each note is annotated with a time stamp and the user who entered the note. This allows you to keep a full history of customer interaction.

To add a note to a case:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Service Requests** under **Orders**. The **Service Requests** page is displayed.
3. Click **Add Note** on the service request to add a note to it. **Add Note** page is displayed.
4. Enter the following fields:
   - **Note Title**: Enter a title for this note.
   - **Note Body**: Enter a description for this note.
5. Click **Submit**. The **Service Requests** page is displayed.



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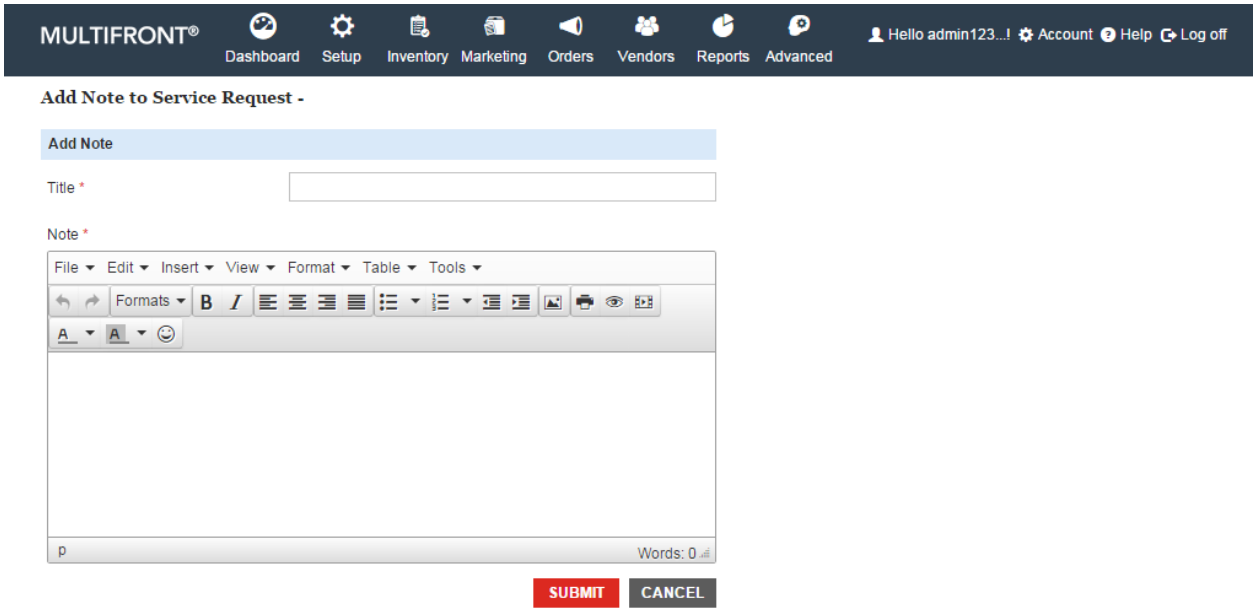

3.5.5 Send an Email Reply to Service Request

You can email a reply directly to a customer from an open service request. The content of each reply email is annotated with a time stamp and the user who entered the reply and is added to the service request. This allows you to keep a full history of customer interaction.

To send an email to the customer regarding a case:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Service Requests** under **Orders**. The **Service Requests** page is displayed.
3. Click **Email Reply** on the service request to send an email to the customer regarding the case. **Reply to Customer** page is displayed.
4. Enter the following fields under **Email Reply**:
   - **Email Subject**: Enter a subject for this email.
   - **Email Message**: Enter the message to the customer.
   - **Attachments**: Click **Browse**. The **Choose file** dialog box opens. Choose a location and enter the filename of the attachment to upload. Click **Open**. The location of the attachment is now displayed next to the **Browse** button.
5. Click **Submit**. The **Service Requests** page is displayed and the email is sent to the email address specified in the customer information. The email will be logged as part of the service request.

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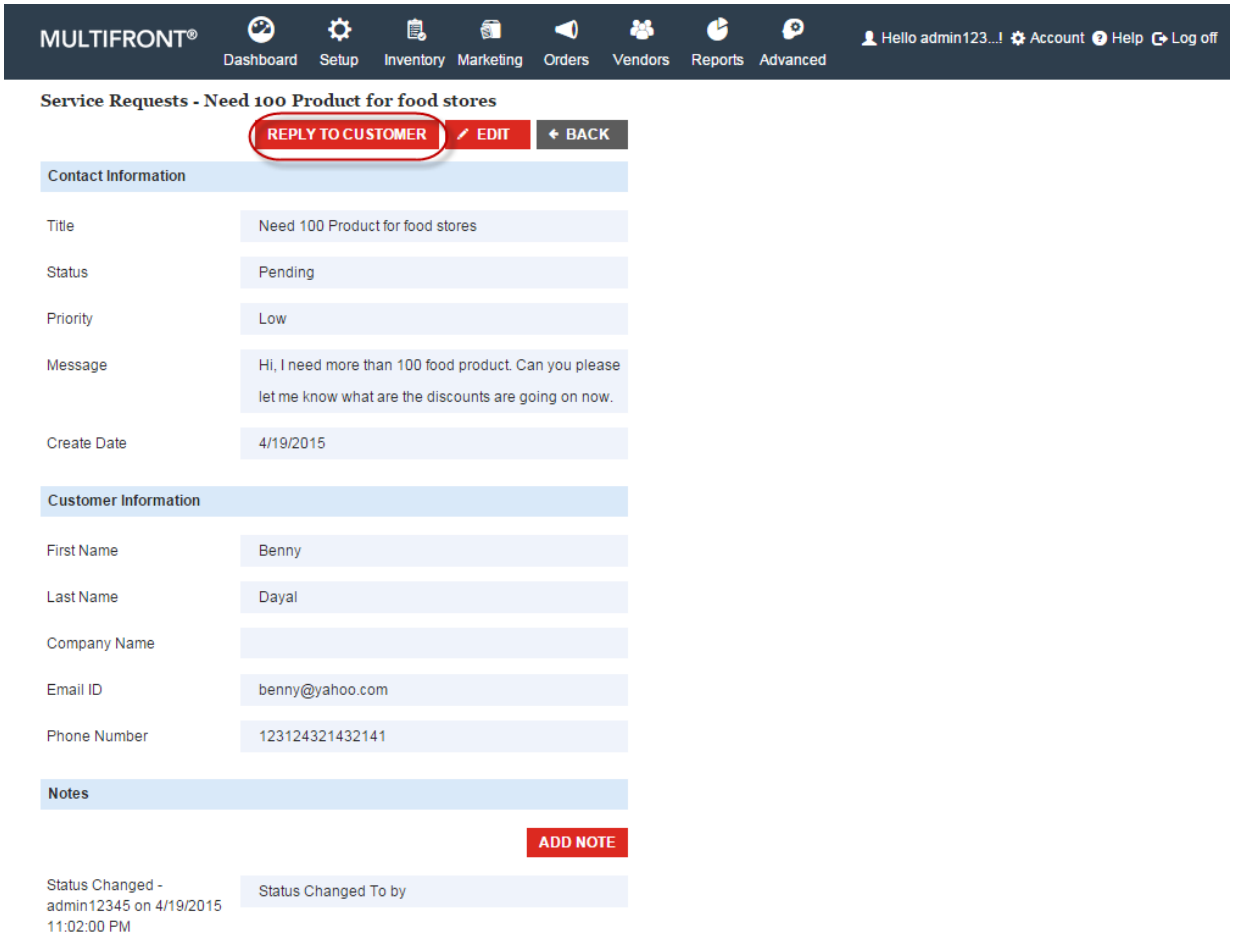

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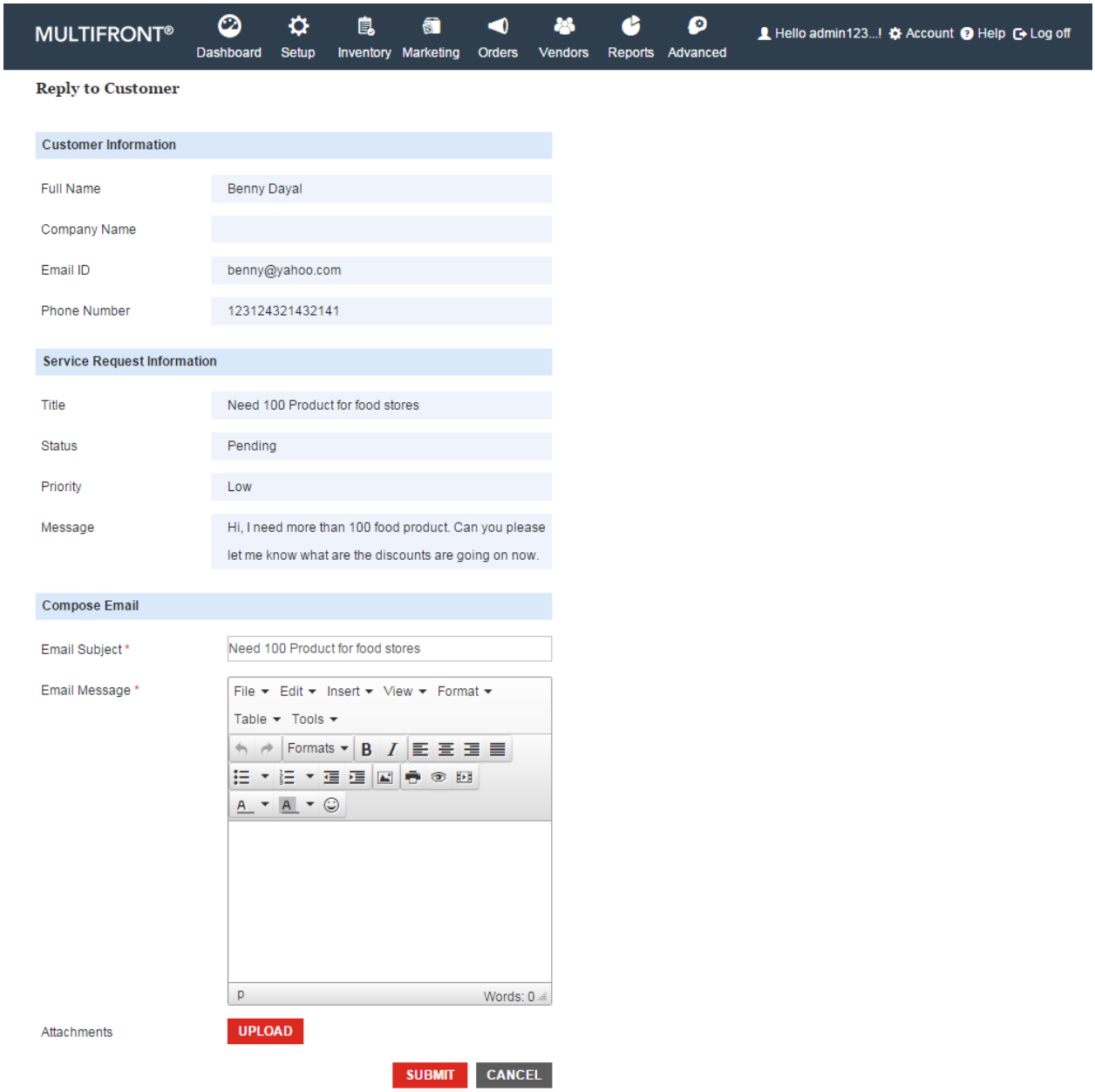

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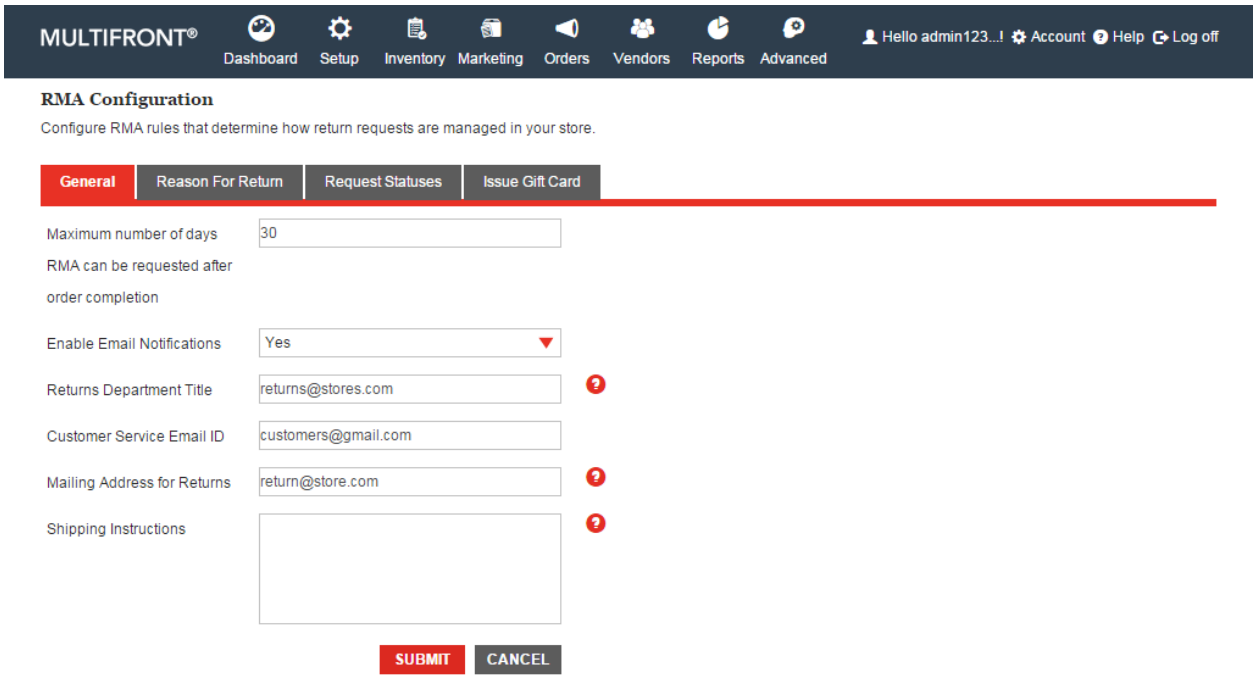
3.6 RMA Configuration

Here can manage configure RMA rules that determines how returns request are managed in the store. Following fields is necessary:

- **Maximum number of days RMA**: In this fields can manage the maximum number of days user can requested after his order completion.
- **Enable Email Notification:** Select option from the drop down. If it is Yes Notification is going with the help of Email ID.
- **Return Department Title:** Enter the Title, This title will be display on the RMA form
- **Customer Service Email ID:** Enter the valid Customer Email ID.
- **Mailing Address for Returns:** Enter the mailing address where the customer must ship their product with the RMA form.
- **Shipping Instruction:** Enter instructions for your customer such as packing, shipping, etc

Click on the **Save** button, All the details is save under the General tab.



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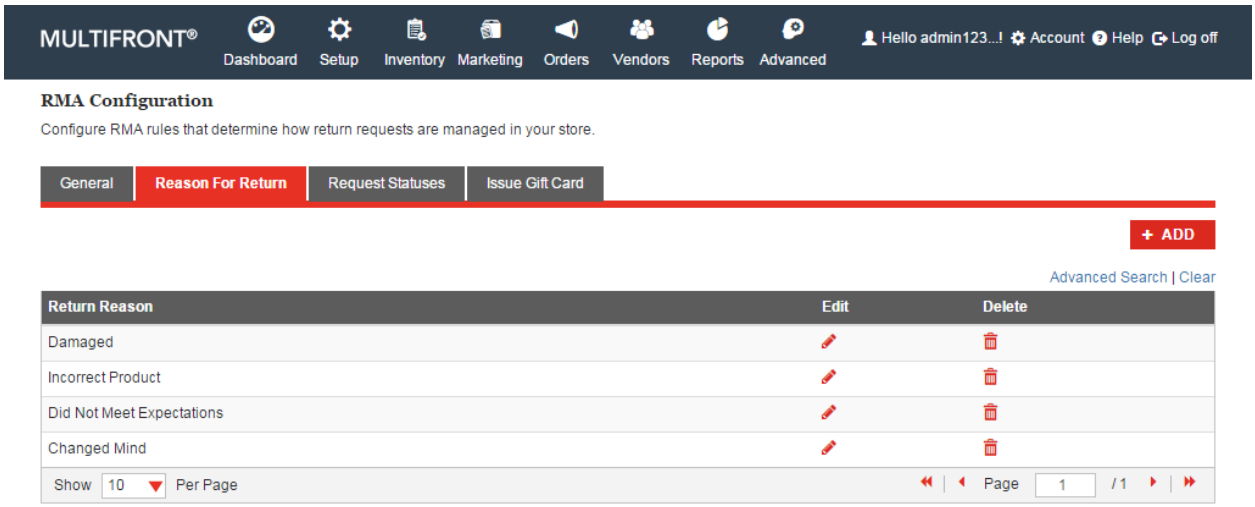
3.6.1 Reason for Returns

In this section can create the Reason:

1. Click on the Create Returns Reason button Pop is display. Enter the following details:

    - **Name**: Enter the Name for the reason
    - **Enable:** Select Yes/No from the drop down.

2. Click on the save button. New reason is created and it is display in the Return Reason grid



3.6.2 Request Statuses

In this section can Manage status for the Reason:

1. Click on the Edit link for any status, Pop up is display on the page
2. Following Details need to enter:

    - **Notification message to Customer:** Enter the details in the Notification message to Customer fields
    - **Notification message to Administrator:** Enter the details in the Notification message to Administrator fields

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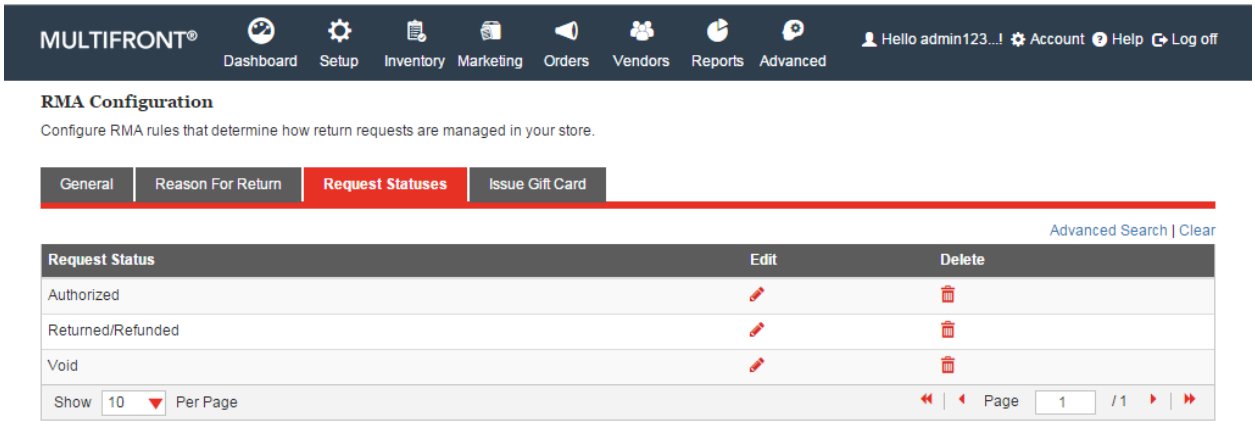

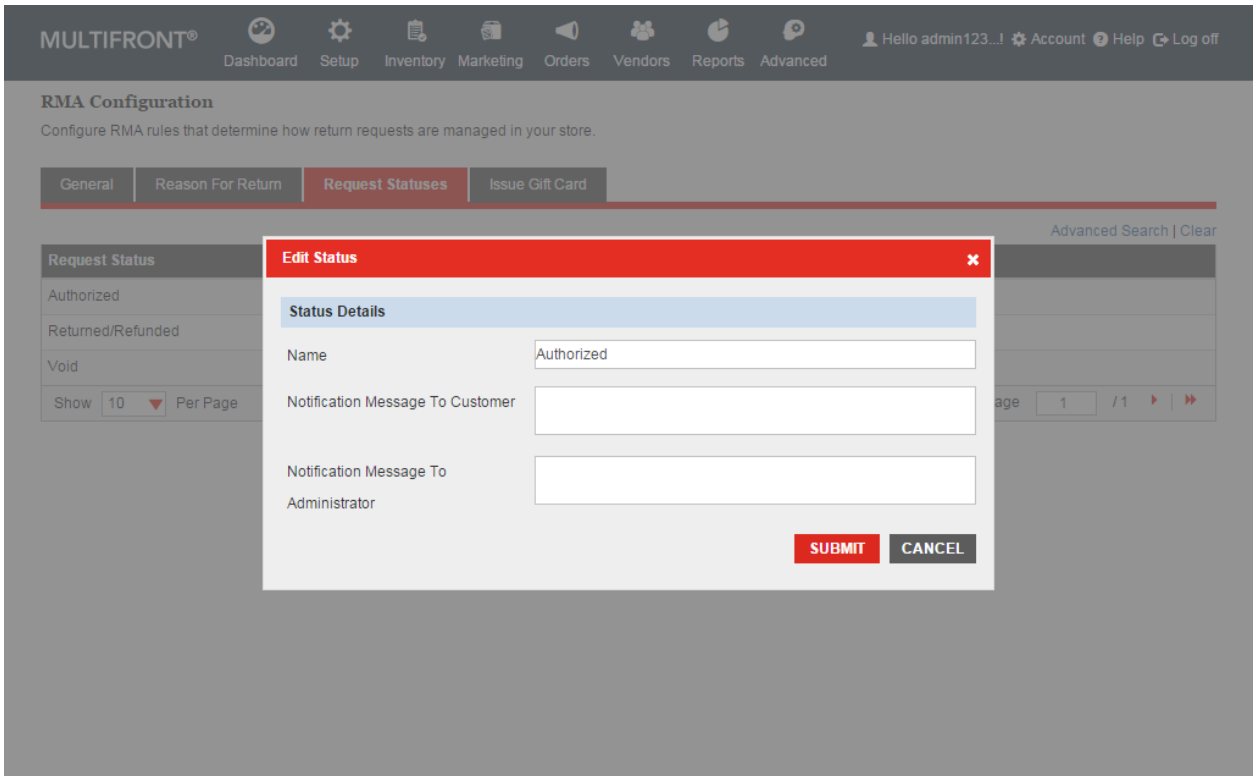

3. Click on the Save button, Updated details is saved in the status.

3.6.3 Issues Gift Card

Here we can manage the Expiration period for the gift card, following fields need to enter:

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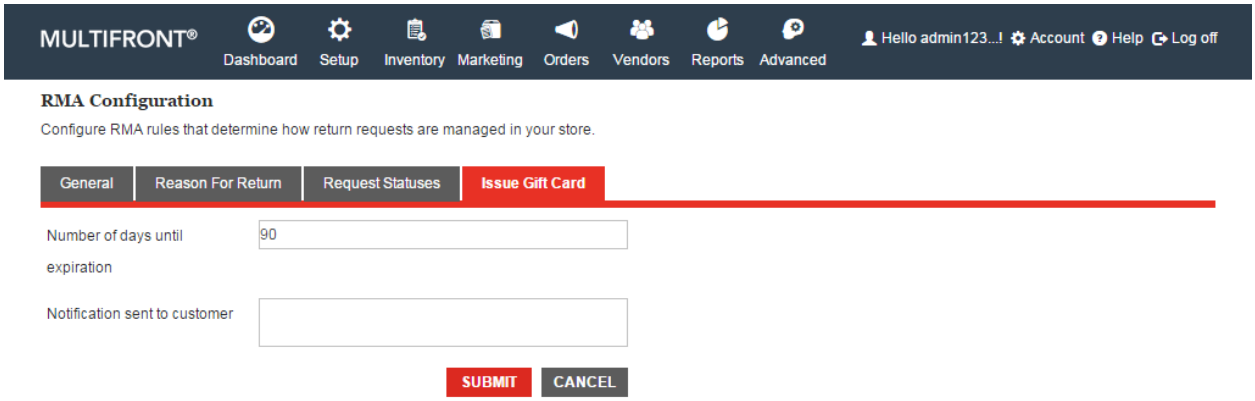
- **Number of days until Expiration**: Enter the Number of days for the gift card expiration
- **Notification Send to customer:** Enter the notification message which is use when notification is send to the customer.

1. Click on the Save button, all the details is saved in the Issues gift card tab.



3.7 RMA Manager

Here can manage the pending request of the store

3.7.1 View RMA List

1. Login the Site Admin. Dashboard is display
2. On the top menu click on the RMA manage link from the Order tab
3. RMA manage page is display.

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4. To search Pending order, enter any of the following:

    - **Store Name:** Select any store name from the drop down
    - **RMA ID:** Enter the RMA ID
    - **Order ID:** Enter the Order ID.
    - **First Name:** Enter the First Name
    - **Last Name:** Enter the Last Name
    - **Begin Date:** Select the Begin date from the calendar.
    - **End Date:** Select the End date from the calendar.
    - **Status:** Select status from the drop down

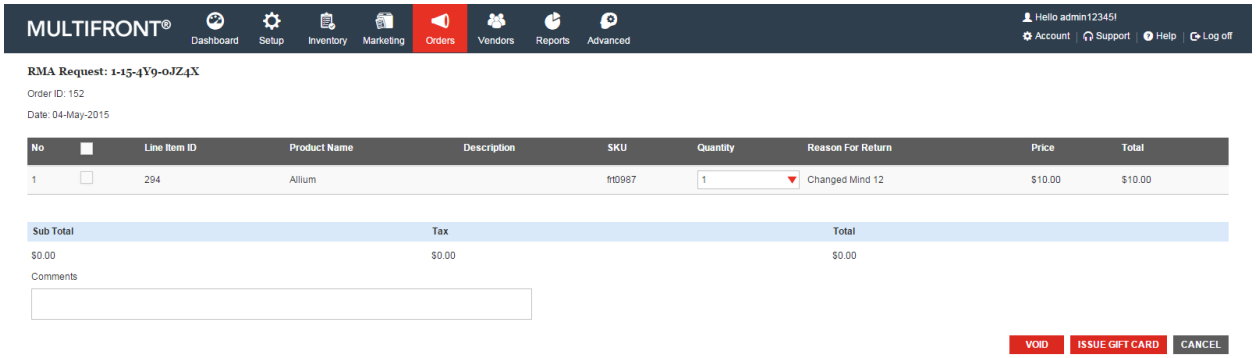
5. Click on the **search** button, All the cases meeting with above criteria will be display in the RMA list

3.7.2 Edit RMA List

Here admin can Void the order and can Refund the customer amount by using the gift card.

To void / Issues gift card the order do the following steps:

1. Click on the Check box and hit void button.
2. Email is going to the customer.
3. Status is changed from the RMA list i.e. Authorize to Void
4. Again select any other RMA ID and click Issue gift card button.
5. It is redirect to the Add a gift card page.
6. Enter the gift card name and expiration date.
7. Click on the submit button.
8. Email is going to the customer along with the gift card number.
9. Status is changed to the Refund/Returned from the RMA list.



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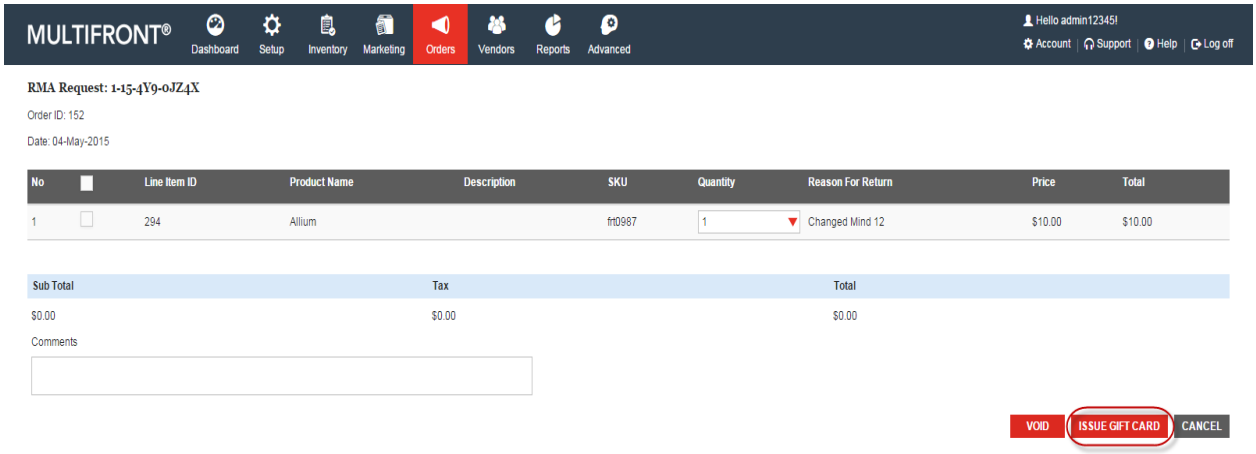
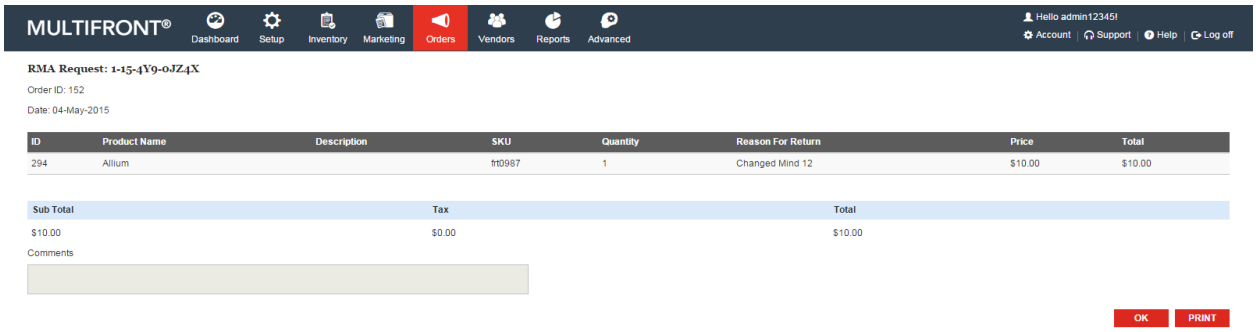


Here Admin can view the RMA Request only for all the status. i.e. for the Void as well as for the Refund / Returns.



3.8 Suppliers

Each product in the storefront can have a supplier associated with it. If a supplier is associated with a product, the name of the supplier will be displayed on the product page. Setting a supplier is optional.

What to do:

1. First add all the supplier whose products you want to sell in the storefront - see Adding a supplier.
2. Then while adding the products to the storefront, choose the respective supplier from the drop down list - see Adding a product

3.8.1 View Suppliers

To view the available suppliers in the storefront:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.

2. On the top menu, click **Suppliers** under **Orders**. The **Suppliers** page is displayed listing

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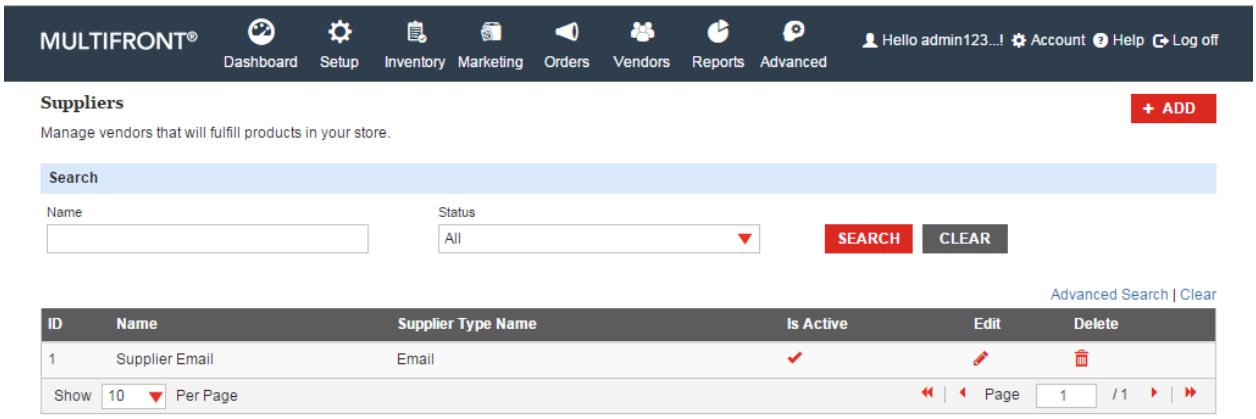
all the available suppliers in the storefront.



3.8.2 Add Supplier

To add a supplier:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Suppliers** under **Orders**. The **Suppliers** page is displayed listing all the available suppliers in the storefront.
3. Click **Add New Supplier**. The **Add New Supplier** page is displayed
4. Enter the following details:
   - **Supplier Name**: Enter the supplier's name.
   - **Supplier Code.**: Enter the supplier code.
   - **Description**: Enter a description for the supplier. This field is optional.
   - **Contact First Name**: Enter the first name of the contact for the supplier.

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- **Contact Last Name**: Enter the last name of the contact for the supplier.
- **Contact Phone**: Enter the phone number of the contact for the supplier.
- **Contact Email**: Enter the email address of the contact for the supplier.
- **Supplier Method**: Select the supplier notification method from the drop-down list.
- **Notification Email**: Enter multiple email address separated by comma. This email address can be used to send order notifications directly to this supplier when customers buy on your site.
- **Email Notification Template**: Enter the XSL email template to use when sending an order to this supplier. An example template can be found at Data/Default/Config/Receipt.xsl
- **Display Order**: Enter a numeric value. This determines the order in which this supplier is displayed. A supplier with the lower display order will be displayed first.
- Enter Custom Information in the following fields:
  - **Custom1**
  - **Custom2**
  - **Custom3**
  - **Custom4**
  - **Custom5**

5. Click **Submit**. The **Supplier** page is displayed. The newly added supplier is displayed in the list.

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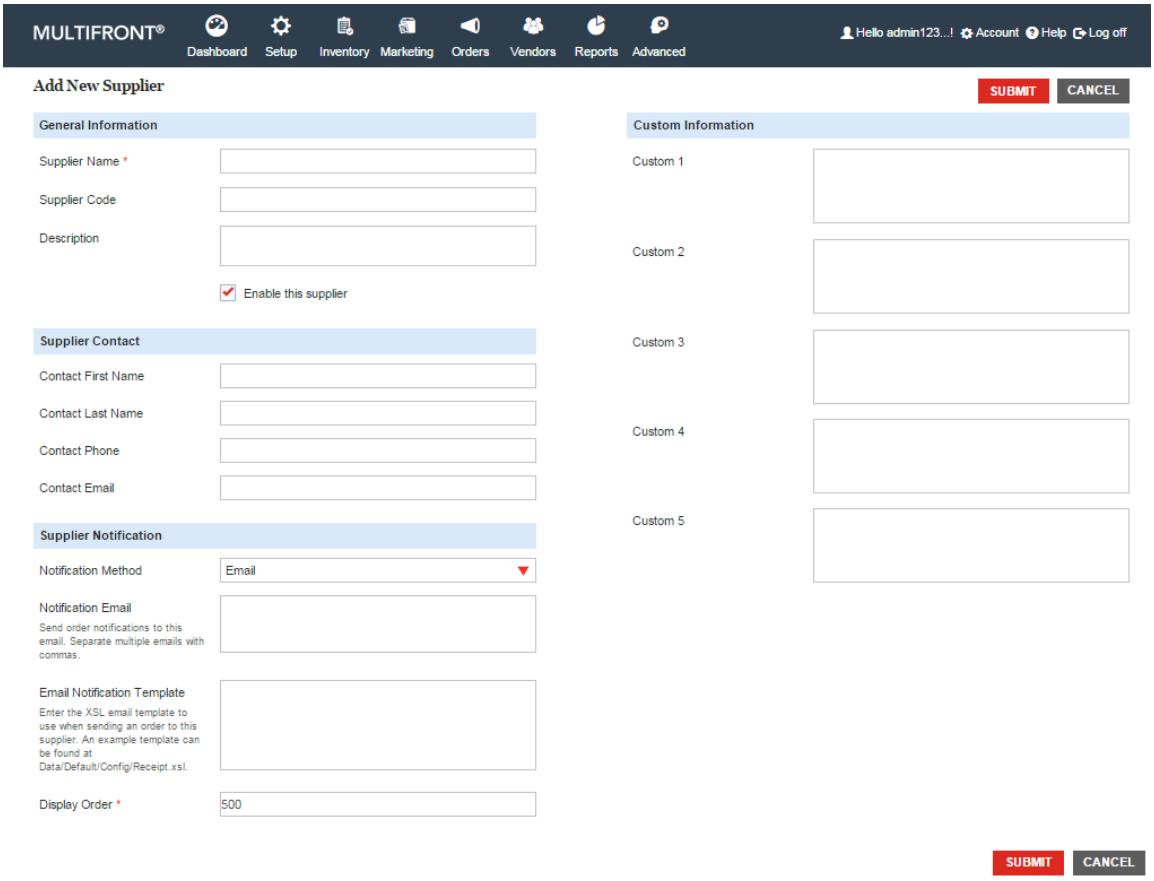

3.8.3 Edit Supplier

To edit a supplier:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Suppliers** under **Orders**. The **Suppliers** page is displayed listing all the available suppliers in the storefront.
3. Click **Edit** on the supplier to edit its details. The **Edit Supplier** page is displayed.
4. Enter the following details:
   - **Supplier Name**: Edit the supplier's name.
   - **External Supplier No.**: Edit the external supplier number.
   - **Enter a description**: Edit a description for the supplier. This field is optional.
   - **Contact First Name**: Edit the first name of the contact for the supplier.
   - **Contact Last Name**: Edit the last name of the contact for the supplier.
   - **Contact Phone**: Edit the phone number of the contact for the supplier.
   - **Contact Email**: Edit the email address of the contact for the supplier.
   - **Supplier Notification Method**: Select the supplier notification method from the drop-down list.

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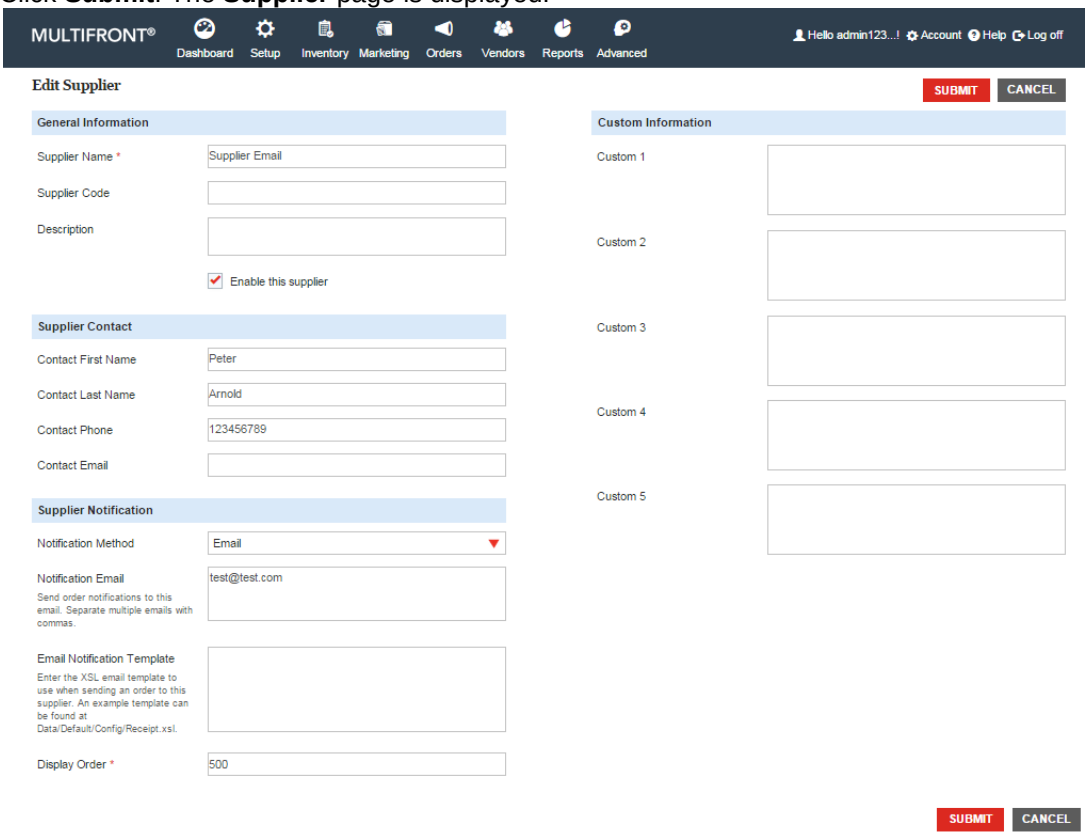
- **Notification Email**: Edit multiple email address separated by comma. This email address can be used to send order notifications directly to this supplier when customers buy on your site.
- **Email Notification Template**: Edit the XSL email template to use when sending an order to this supplier. An example template can be found at Data/Default/Config/Receipt.xsl
- **Display Order**: Edit the numeric value. This determines the order in which this supplier is displayed. A supplier with the lower display order will be displayed first.
- **Enable this Supplier**: Select to display the supplier name on the product page, in the storefront.
- Edit Custom Information in the following fields:
  - **Custom1**
  - **Custom2**
  - **Custom3**
  - **Custom4**
  - **Custom5**

5. Click **Submit**. The **Supplier** page is displayed.



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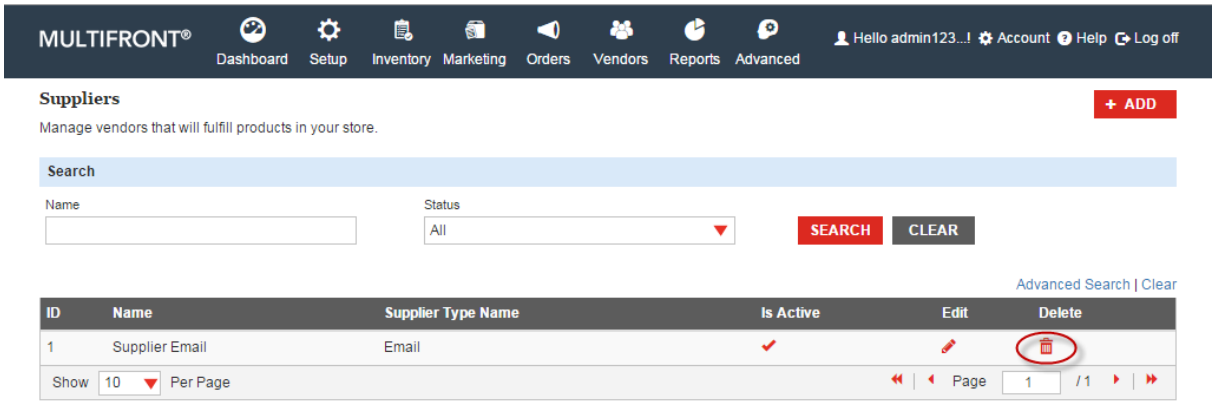
3.8.4 Delete Supplier

To delete a supplier:

1. Login to the Marketplace administration website. The **Dashboard** page is displayed.
2. On the top menu, click **Suppliers** under **Orders**. The **Suppliers** page is displayed listing all the available suppliers in the storefront.
3. Click **Delete** on the supplier you want to delete. The **Suppliers** page is displayed with the deleted supplier removed from the list.

Note: You would not be allowed to delete a supplier if it is associated to a product. Remove this association and then delete the supplier.



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