

# 9 Managing Orders and Customers

This chapter describes how to manage customers and how to add Orders from the backend. This chapter contains the following sections:

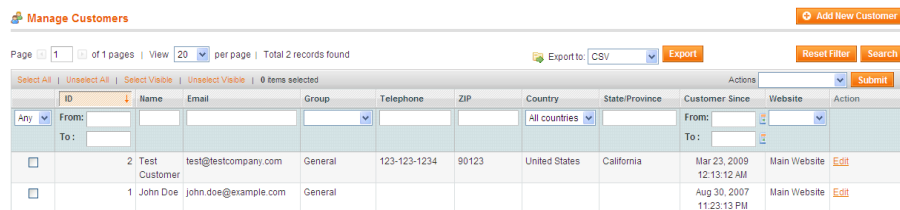
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## Managing Customers

### Viewing and Editing Customers

#### ► To view existing customers:

- 1 From the Customers menu, select the **Manage Customers** option to see a list of all the customers that opened accounts in your web store or were added using the **Add New Customer** button, as shown below:



The screenshot shows the 'Manage Customers' interface. At the top, there is a 'Manage Customers' link and an 'Add New Customer' button. Below this, there are filters for 'Page' (1 of 1 pages), 'View' (20 per page), and 'Total 2 records found'. There are also 'Export to: CSV' and 'Export' buttons, and 'Reset Filter' and 'Search' buttons. The main table has columns for 'ID', 'Name', 'Email', 'Group', 'Telephone', 'ZIP', 'Country', 'State/Province', 'Customer Since', 'Website', and 'Action'. Two customer records are visible:

ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website	Action
2	Test Customer	test@testcompany.com	General	123-123-1234	90123	United States	California	Mar 23, 2009 12:13:12 AM	Main Website	Edit
1	John Doe	john.doe@example.com	General					Aug 30, 2007 11:23:13 PM	Main Website	Edit

- 2 Click the **Edit** link on the right side of a customer's row or click the **Add New Customer** button to display the following page:



The screenshot shows the 'Customer Information' page for 'Test Customer'. The page has a sidebar with navigation links: 'Customer View', 'Account Information', 'Addresses', 'Orders', 'Shopping Cart', 'Wishlist', 'Newsletter', 'Product Reviews', and 'Product Tags'. The main content area is divided into several sections:

- Personal Information:** Last Logged In: Never (Offline); Last Logged In (UTC): Mar 24, 2009 9:39:46 AM (Offline); Confirmed email: Confirmed; Account Created on: Mar 23, 2009 12:13:12 AM; Account Created in: English; Customer Group: General; Primary Billing Address: Test Customer, Test Street 1, Test Street 2, Test City, California, 90123, United States, T: 123-123-1234.
- Sales Statistics:** A table showing sales data for the website and store.
- Recent Orders:** A section showing the customer's recent orders, including a shopping cart with 2 items and an empty wishlist.

Website	Store	Store View	Lifetime Sales	Average Sale
Main Website	Main Store	English	\$21.24	\$21.24
<b>All Store Views</b>			<b>\$21.24</b>	<b>\$21.24</b>

The tabs in the left panel provide a variety of types of information about the customer and for handling the relationship with a customer, such as: when the customer last logged in and out, addresses, ordering statistics, recent Orders, current shopping cart contents, their last reviews, the newsletter to which they subscribed and so on.

The Group to which the customer belongs determines which discounts are given to this customer, as defined in the **Catalog Price Rules** and **Shopping Cart Price Rules** which are described in the *Catalog and Shopping Cart Price Rules* section on page 158, and the tax rule that is applied to that customer.

## Adding a Customer

Customers typically register themselves in your web store using the **My Account** link in the header of each page. In addition, you can use the following option to add a customer using the backend.

### ► To add a new customer:

- 1 From the **Customers** menu, select the **Manage Customers** option.
- 2 Click the **Add New Customer** button to display the following page:

The screenshot shows the 'New Customer' form in a Magento backend. The form is divided into two main sections: 'Account Information' and 'Password Management'. The 'Account Information' section includes fields for 'Associate to Website' (set to 'Admin'), 'Prefix', 'First Name', 'Middle Name/Initial', 'Last Name', 'Suffix', 'Email', 'Customer Group' (set to 'General'), 'Date Of Birth', 'Tax/VAT number', and a checkbox for 'Send welcome email'. The 'Password Management' section includes a 'Password' field and a checkbox for 'Send auto-generated password'. At the top right of the form are buttons for 'Back', 'Reset', and 'Save Customer'.

This page enables you to define basic identifying information about the customer and his/her various addresses. Many aspects of the information retained about a customer in Magento can be accessed by editing the customer's information, as described in the *Viewing and Editing Customers* section on page 177.

- 3 Fill out the customer's information and then click the **Save Customer** button.

# Checking Online Customers

You can check which customers are currently online and view their activity.

## ► To view online customers:

From the **Customers** menu, select the **Online Customers** option to display the following page:

Online Customers

Page 1 of 1 pages | View 20 per page | Total 1 records found Reset Filter Search

ID	First Name	Last Name	Email	IP Address	Session Start Time	Last Activity	Type	Last Url
2	Test	Customer	test@testcompany.com	127.0.0.1	Mar 24, 2009 8:59:00 AM	Mar 24, 2009 9:57:13 AM	Customer	http://www.magentostore.com/index.php/customer/account/

# Customer Reports

A variety of customer reports can be generated by selecting the **Reports** menu and then the **Customers** option.

The following describes the available Customer reports:

- **New Accounts:** Shows the customers that have opened accounts in your web store during the period that you specify.
- **Customer by orders total:** Lists customers with the ones that spend the most money in your web store listed first.
- **Customer by number of orders:** Lists customers with the ones that make the most orders listed first.

## Managing Orders

The *Managing Orders* section in *Chapter 3, Introducing the Backend* on page 45 introduces the procedures for handling the day-to-day order management tasks in your web store. This section assumes that you have read that chapter.

You may refer to the *Viewing the Orders in Your Web Store* section on page 45 for a description of how to view and edit the Orders in your web store.

## Orders Terminology

This section describes some of the terms used for handling Orders in Magento. In addition to creating Orders, there are many features in the Magento backend that are part of the process of managing and fulfilling Orders, such as creating Invoices, shipments and credit memos and editing and cancelling Orders.

### Sales Order

When an Order is created in a Magento web store, either in the frontend or in the backend, a Sales Order is created to record this transaction. This Sales Order can be seen in the Orders list by selecting the **Orders** option from the **Sales** menu in the backend.

This is only a temporary record. Payment has not yet been processed and the Order can still be canceled.

### Invoice

An Invoice is a record of the receipt of payment for an Order.

*Note: In some cases, payment is automatically received during the creation of an Invoice.*

Creating an Invoice for a product's Order converts the temporary Sales Order into a permanent record of an Order, which can no longer be cancelled.

Multiple Invoices can be created for a single Order, each containing as much or as few of the purchased products that you specify.

## Shipment

A Shipment is a record of the products in an Order which have been shipped. Like an Invoice, multiple Shipments can be created per Order, until all of the products in the Order are shipped.

## Credit Memo

A Credit Memo is a record of a refund. A product cannot be refunded until it has been paid (which means that it has been Invoiced). This means that you are not able to create a Credit Memo until after an Invoice has been created.

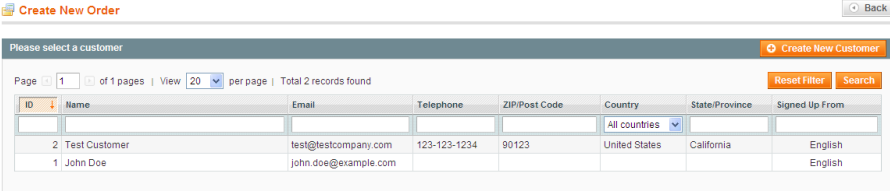
The Credit Memo serves as a record of a refund, but it is not a record of a return (which is the actual returning of funds to the customer).

## Creating New Orders

This section describes how to create an Order using the backend, such as when an Order is received on the phone.

### ► To create a new Order from the backend:

- 1 From the Sales menu, select the Orders option.
- 2 Click the Create New Order button on the top right of the page to display the following page:



The screenshot shows a web interface for selecting a customer. At the top, there is a 'Create New Order' button and a 'Back' button. Below that, a header reads 'Please select a customer' with a 'Create New Customer' button on the right. The main area contains a table with the following data:

ID	Name	Email	Telephone	ZIP/Post Code	Country	State/Province	Signed Up From
2	Test Customer	test@testcompany.com	123-123-1234	90123	United States	California	English
1	John Doe	john.doe@example.com					English

**3** Select a customer or click the **Create New Customer** button to display the following page:

Create New Order for Test Customer in English Cancel Submit Order

Order Currency: US Dollar

**Customer's Current Activities** Update Changes

Shopping Cart (0) No Items

Wishlist (0) No Items

Last ordered items (0) No Items

Products in Compare List (0) No Items

Recently Compared Products (0) No Items

Recently Viewed Products (0) No Items

Update Changes

**Items Ordered** Add Products

No ordered items

**Account Information**

Customer Group \* General

Email \* test@testcompany.com

**Billing Address**

Select from existing customer addresses:  
Test Customer, Test Street 1 Test Street 2, Test City, California 90123

Prefix

First Name \*

Middle Name/Initial

Last Name \*

Suffix

Company

Street Address \*

City \*

Country \* United States

State/Province \* California

Zip/Postal Code \*

Telephone \*

Fax

Save in address book

**Shipping Address**

Select from existing customer addresses:  
Test Customer, Test Street 1 Test Street 2, Test City, California 90123

Same As Billing Address

Prefix

First Name \*

Middle Name/Initial

Last Name \*

Suffix

Company

Street Address \*

City \*

Country \* United States

State/Province \* California

Zip/Postal Code \*

Telephone \*

Fax

Save in address book

**Payment Method**

Credit Card (saved)

Check / Money order

No Payment Information Required

**Shipping Method**

[Get shipping methods and rates](#)

**Order History**

Order Comments

**Order Totals**

Subtotal	\$0.00
<b>Grand Total</b>	<b>\$0.00</b>

Append Comments

Email Order Confirmation

Submit Order

*Note: If your store has multiple store views, you are first asked in which of the store views the order should be created.*

*Note: If you selected to create a new customer, you need to fill all the address information.*

- 4 Click the **Add Products** button to display the following page:

Please select products to add Add Selected Product(s) to Order

Page 1 of 6 pages | View 20 per page | Total 104 records found Reset Filter Search

ID	Product Name	SKU	Price	<input type="checkbox"/>	Qty To Add
166	HTC Touch Diamond	HTC Touch Diamond	\$750.00	<input type="checkbox"/>	
162	Microsoft Wireless Optical Mouse 5000	micronmouse5000	\$59.99	<input type="checkbox"/>	
161	Logitech diNovo Edge Keyboard	logidinovo	\$239.99	<input type="checkbox"/>	
160	Logitech Cordless Optical Trackman	logitechcord	\$79.99	<input type="checkbox"/>	
159	Microsoft Natural Ergonomic Keyboard 4000	microsoftnatural	\$99.99	<input type="checkbox"/>	
157	30" Flat-Panel TFT-LCD Cinema HD Monitor	M9179LL	\$699.99	<input type="checkbox"/>	
156	19" Widescreen Flat-Panel LCD Monitor	W1952TQ-TF	\$399.99	<input type="checkbox"/>	
155	Seagate 250GB HD - 5400RPM	250gb5400	\$99.00	<input type="checkbox"/>	
154	Seagate 500GB HD - 5400RPM	500gb5400	\$299.00	<input type="checkbox"/>	
153	Intel Core 2 Extreme QX9775 3.20GHz Retail	intelcore2extreme	\$2,049.99	<input type="checkbox"/>	
152	24" Widescreen Flat-Panel LCD Monitor	W2452T-TF	\$699.99	<input type="checkbox"/>	
151	Intel C2D E8400 3.0GHz Retail	intelc2d	\$98.99	<input type="checkbox"/>	
150	Western Digital 500GB HD - 7200RPM	500gb7200	\$299.00	<input type="checkbox"/>	
149	Western Digital - 1TB HD - 7200RPM	1tb7200	\$399.00	<input type="checkbox"/>	
	Western Digital - 1TB HD - 7200RPM		\$98.99	<input type="checkbox"/>	

- 5 Select the products to be purchased and click the **Add Selected Product(s) to Order** button.



*Tip: If you selected one of the existing customers, then the left column shows a list of the products that this customer has in his/her cart, wish list, recently ordered, viewed or compared. To add one those products to the order, select the required product and click **Update Changes** button.*

- 6 Fill out the other mandatory fields of the Order, those marked by an asterisk (\*), such as: shipping method and payment method.
- 7 You can define many options for the order like choosing custom prices for products and applying discount codes.
- 8 After you have completed all the required Order information, click the **Submit Order** button to display the order information page.
- 9 To confirm payment, click the **Invoice** button to generate an Invoice for your review.
- 10 Review the Invoice, and if all is well, click the **Submit Invoice** button at the bottom of the page.
- 11 When you are ready to ship the products, click the **Ship** button to generate a Shipment document.

- 12** If required, you can add a tracking number received from the shipping service by clicking the **Add Tracking Number** button. Adding a tracking number enables customers to review their Order using the **My Account** option that appears on the right side of the header of the frontend.
- 13** Review the Shipment. You can modify the quantity to be shipped if only part of the Order is ready.  
  
The Order changes to **Completed** status after all its products have been shipped.
- 14** Click the **Email Copy of Shipment** option, shown below, to automatically send an email to the customer notifying them that their products were shipped.
- 15** Click the **Submit Shipment** button at the bottom of the page.
- 16** Click the **Back** button to return to the Orders page where you can create additional Orders if required. You may refer to *Chapter 9, Managing Orders and Customers* on page 177 for more details.

## Refunding

You can create a record of a product refund from an existing Order by generating a Credit Memo.

► **To view the list of refunds made in your web store:**

From the **Sales** menu, select the **Credit Memos** option to display the following page:

**Credit Memos**

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Page  of 1 pages | View  per page | Total 1 records found

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions

	Credit Memo #	Created At	Order #	Order Date	Bill to First name	Bill to Last name	Status	Refunded	Action
Any <input type="button" value="v"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	From: <input type="text"/> To: <input type="text"/>	
<input type="checkbox"/>	100000001	Mar 24, 2009 11:17:01 PM	100000004	Mar 24, 2009 9:49:38 PM	Test	Customer	Refunded	\$63.07	<a href="#">View</a>

► **To refund a product from an existing Order:**

*Note: You can create Credit Memos only for Orders for which Invoices were created. Without an Invoice, an Order is assumed not to be paid so that there is nothing to refund in a Credit Memo.*

- 1 From the **Sales** menu, select the **Orders** option to display a list of the existing Orders.
- 2 Click the **View** link on the right side of the row of each Order to display the Order view page.
- 3 Click the **Credit Memo** button to generate a credit memo.
- 4 Scroll down to the **Items to Refund** area, as shown below, and in the **Qty to Refund** field of the relevant product, specify the quantity of products to refund.
- 5 To specify that this product was actually returned to the web store, check the **Return to Stock** option, shown below:

Items to Refund								
Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Coalesce: Functioning On Impatience T-Shirt SKU: coal_sm Size Small	\$15.00	Ordered 1 Invoiced 1	<input type="checkbox"/>	<input type="text" value="1"/>	\$15.00	\$1.24	\$0.00	\$16.24
<a href="#">Update Qty's</a>								

- 6 Click the **Email Copy of Credit Memo** option, shown below, to automatically send an email to the customer that the order has been refunded. You can also adjust the refund totals to match your business rules.

Refund Totals	
Subtotal	\$15.00
Tax	\$1.24
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
<b>Total Refund</b>	<b>\$21.24</b>
<hr/>	
Append Comments	<input type="checkbox"/>
Email Copy of Credit Memo	<input type="checkbox"/>
<input checked="" type="button" value="Refund"/>	

- 7 Click the **Refund** button at the bottom of the page. The total of the Order from which this product was refunded is updated automatically.
- 8 Click the **Back** button to return to the Orders page where you can create additional Orders, if required.

*Important Note: Currently, refunding an Order in Magento does not cause an actual payment refund. You must refund the payment on your own. Credit Memo is only a record used to track the refunds and to provide proper values in the reports.*