

Introduction

The Order Status Component has several uses and is linked into several places in your CommerceCM Site.







Order Status is used

- 1) In the Order Manager (Reports>Orders) to easily access orders in various stages of completion.
- 2) By Registered Customers who are viewing their Order History¹
- 3) To notify customers when some action has been taken on their orders

Setup

You can access the Order Status configuration through the Admin>Order Status menu.

By default your site foundation is set up with some common settings as shown in the table below.

Admin · Order Status Management		
Order Status		Add New Order Status
Name	Description	
New Order	A new order that has been placed, but not processed.	
On Hold	An order that has had processing postponed.	
Pending	An order that is pending processing.	
In Progress	An order that is currently being processed.	
Ready To Ship	An order that is processed and awaiting shipping.	
Partially Shipped	An order that has had some items shipped.	
Cancelled	An order that has been cancelled.	
Complete	An order that has been processed and shipped.	

There are only two statuses that cannot be deleted. New Order and Complete. The rest can be deleted and modified as your organization requires. The simplest organizations only need New Order and Complete.

The editing and creation of a new Status use the same form. I will show the features by editing a Status.

¹ If your site is configured with this feature.

Edit Order Status

Name:

Rank:

Emails: ☐ Email customer when applied to order:

Show In Order Count List: ☒

Description:

The Status must have a Name, a Rank and a Description. All of the other fields are optional.

The name is limited to 25 characters

Rank works the same way as it does in the rest of the CM systems. Items are presented in the lists from lowest to highest Rank.

Show in Order Count List determines if the Status shows up in the Status table on the Orders count list in the manager.

The description is used on the table on the Status landing page so that your staff know how to interpret the order status.

Some merchants choose to notify their customers whenever their order is 'handled'. You can click the checkbox if you want CommerceCM to send messages to the shopper when the order status is used.

When email is selected the form opens up some additional fields.

You can specify the message subject and an email address to send it from. This email address should be an existing address so that if a shopper responds to the message it will be delivered to the appropriate staff person.

To create or modify the message, click the “**Edit**” link in the lower right of the email content window. This will open a pop up window with our familiar WYSIWYG editor.

Rank:

Email customer when applied to order: ☒

Language Data: View
EN-US: English - United States

Subject:

From Email:

Email:

Thank you for shopping with Espressos Only where we sell only the finest espresso roasted coffee beans from around the world.

Some of your order was shipped today. The remainder of the order will be shipped when our roast is done.

If you have any questions, please feel free to contact our customer service department at customerservice@espressosonly.com or toll free 1-800-JITTERS

Show In Order Count: ☒

This message will be sent any time the particular status is applied to the order. At this time there is no way to customize this message with shopper or order information.

Most merchants only use the email feature to send messages when an order is set to Complete.

Using Status in Order Manager.

You access the Order Manager with the Reports>Orders menu.

Store · Orders

Quick Stats

Statistics	Orders	Items	Items/Order
YTD: 2007	18	37	2.03
MTD: October	0	0	0
Today	0	0	0
Avg. Daily	0	0	0

Quick Search

- Select -
Contains

SEARCH

[Advanced Search]

Currency Summary For: Year To Date

Currency	Orders	Items	Value	Avg Value
CAD	14	30	\$439.16	\$31.37
USD	4	7	\$69.96	\$17.49

Order Status

Status	Orders
New Order	11
On Hold	1
Pending	1
In Progress	0
Ready To Ship	3
Partially Shipped	0
Cancelled	1

The Order Status table is shown under the currency summary. It shows each order status that you have set to show in the Order Count List. You will notice that **Complete** does not show in this list because merchants have thousands of completed orders.

To see a quick list of orders with any status, simply click on the Status Name in the left column of the table.

Advanced Search

Criteria 1: Processing Status = Ready To Ship
ADD CRITERIA

SEARCH

[download spreadsheet]
3 Records ; Page: 1 of 1 Items Per Page: 100

Order ID	Date	Shopper	Items	Product	Shipping	Tax	Total	Order Type	Order Status	Method
C20070504-5000	5/4/2007	Test, Idealever	1	\$30.00	\$0.00	\$0.00	\$30.00	Web	Ready To Ship	Visa
C20070504-5002	5/4/2007	Test, Idealever	1	\$41.00	\$0.00	\$0.00	\$41.00	Web	Ready To Ship	MasterCard
U20070517-5002	5/17/2007	TEST, TEST	2	\$13.99	\$5.00	\$0.00	\$18.99	Web	Ready To Ship	MasterCard

3 Records ; Page: 1 of 1 Items Per Page: 100

This is particularly useful to access all New Orders, or if you have multiple people in your shipping department, all orders that are Ready to Ship.

From this table, you can click the Order ID to access the order and page through all orders using the Previous and Next links on the Order Detail page.