



**SEASONAL LIVING**®

**Seasonal Living WooCommerce Basic Order**

# Seasonal Living Woocommerce Basic Order

## Purchase Orders

When a customer submits an order through the Website., the order will appear in the WooCommerce > Order admin section.

You and the customer will receive an email regarding the PO.

<input type="checkbox"/>	Order	Date	Status	Total	Shipment Tracking	ID	QBD Status
<input type="checkbox"/>	#25705 Rashawn Gibbs	33 seconds ago	Purchase Order	\$1,400 -		25705	Not Synced Add to queue
<input type="checkbox"/>	#25700 Rashawn Gibbs	Oct 17, 2019	✓	\$2,600	UPS TEST19991019128393	25700	Quashed
<input type="checkbox"/>	#25699 KAREN Gregory	Oct 16, 2019	Sales Order	\$1,000 -		25699	Not Synced Add to queue
<input type="checkbox"/>	#25691 test151 test151	Oct 16, 2019	Sales Order	\$1,920 -		25691	Not Synced
<input type="checkbox"/>	#25688 test151 test151	Oct 16, 2019	Payment Pending	\$1,820 -		25688	Not Synced

List of orders found in WooCommerc > Orders.

## Creating a Sales Order

- 1) Click into the Purchase Order
- 2) Review Billing, Shipping, Additional Information, Products and Pricing. Confirm correct pricing for this customer.
- 3) Check Options below like adding shipping
- 4) Change Status to SALES ORDER
- 5) Change ORDER ACTIONS to "Send Sales Order Acknowledgement to Customer".

### OPTIONS:

- A) Add Shipping if necessary.
- B) Add Notes to under "Order Notes" if necessary.
- C) Add Product Items and add "Meta" information if necessary.
- D) You can also add Fees and Taxes if necessary.

### Order #25705 details

Payment via Payment TBD. Customer IP: 107.220.59.105

General	Billing	Shipping	Additional
Date created: 2019-11-15 @ 03:56 Status: Sales Order Customer: TestWCUser (#4856 - Te... x	Rashawn Gibbs Test WooComm Customer 13800 Lyndhurst St. 204 Austin, TX 78717 Email address: peter@peterkingdesign.com Phone: 5125551234 ROLE: designer % DISCOUNT: 50% SALES REP (ID): Bjorn Tingvall rep (79)	Rashawn Gibbs Test WooComm Customer 13800 Lyndhurst St. 204 Austin, TX 78717 Customer provided note: THIS is an order note	Reseller Tax ID 1234 Reseller State Tx Purchase Order # / Reference # PO_TEST The Shipping Address above is... Residential (Lift Gate Required) Ship On or Before... 11/30/2019

**Shipment Tracking**  
[Add Tracking Info](#)

**Order actions**  
[Send Sales Order Acknowledge](#) >  
 Choose an action...  
[Move to trash](#) [Update](#)

*Change Order Actions to "Send Sales Order Acknowledgement to Customer".*

Item	Cost	Qty	Total
 Carlotta Vase (WC TEST) - Gloss Black SKU: 308GU353P2GB Variation ID: 25618	\$900	x 1	\$900
 Spirals Lounge Chair (Test Product) SKU: 12345	\$500	x 1	\$500
Seasonal Living Shipment Items: Carlotta Vase (WC TEST) - Gloss Black x 1, Spirals Lounge Chair (Test Product) x 1			\$150
		Shipping:	\$150
		Total:	\$1,550

[Add item\(s\)](#) [Apply coupon](#) [Refund](#) [Recalculate](#)

A purchase order converted to a shipping order with shipping added.

# Seasonal Living Woocommerce Basic Order

## Sales Orders

Now you have a Sales Order and the customer will have received a sales order acknowledgment email. At this point you're waiting for the customer to PAY NOW.

<input type="checkbox"/>	Order	Date	Status	Total	Shipment Tracking	ID	QBD Status
<input type="checkbox"/>	#25705 Rashawn Gibbs	31 mins ago	Sales Order	\$1,550 -		25705	<span>Not Synced</span> <a href="#">Add to queue</a>

*The order is now listed as a Sales Order.*

## Payment Pending

Once the order is paid, it will appear as Payment Pending in the WC orders section. You may open the order to check the type of payment submitted. Payment will remain pending until the Check, Bank Deposit or Credit Card has cleared.

<input type="checkbox"/>	Order	Date	Status	Total	Shipment Tracking	ID	QBD Status
<input type="checkbox"/>	#25705 Rashawn Gibbs	37 mins ago	Payment Pending	\$1,550 -		25705	<span>Not Synced</span> <a href="#">Add to queue</a>

*Once the order is paid, it will show as Payment Pending.*

Order #25705 details Payment via Direct bank transfer. Customer IP: 107.220.59.105
---

*Click into the order and see the payment method below the order number.*

# Seasonal Living Woocommerce Basic Order

## Processing / Fulfillment

The order is now paid and you must open the account and change status to “Processing / Fulfillment” and click UPDATE.

Tip: You may also do this in the Actions in the WC order list.

You will need to click into the order to send a Pick List. Do this in the Order Actions menu on the right.

Once Status is updated, the order is queued for Quickbooks to the MyWorks interface. It will almost instantly be synced. The customer will receive an email about fulfillment.

## Add Tracking

Once an order is fulfilled and you receive the tracking carrier and number you may add. Open the order and click Add Tracking Info. Select the carrier and add the number.

## Order Shipped / Complete

Once tracking is added change the status to Completed. An email with tracking information will be sent to the customer.

Tip: You may also add tracking and auto-complete the order in the Actions column in the WC Order list.

Order #25705 details  
Payment via Direct bank transfer. Customer IP: 107.220.59.105

**General**  
Date created: 2019-11-15 @ 03:56  
Status: Processing / Fulfillment  
Customer: TestWCUser (#4856 – TestW...)

**Billing**  
Rashawn Gibbs  
Test WooComm Customer  
13800 Lyndhurst St.  
204  
Austin, TX 78717  
Email address: peter@peterkingdesign.com  
Phone: 5125551234  
ROLE: designer  
% DISCOUNT: 50%  
SALES REP (ID): Bjorn Tingvall (79)

Order	Date	Status	Total	Actions
#25705 Rashawn Gibbs	1 hour ago	Payment Pending	\$1,550	

Change Order from Payment Pending to Processing /Fulfillment by clicking into the order and changing the status (left). Or, you may simply click on the processing icon under actions in the order list. (above)

Order	Date	Status	Total	Actions	Shipment Tracking	ID	QBD Status
#25705 Rashawn Gibbs	1 hour ago	Processing / Fulfill...	\$1,550		-	25705	Queued

After payment is made, the order status is updated to Processing / Fulfillment and Queued for Quickbooks.

**Order actions**

Send Pick List (Admin) custom >

[Move to trash](#) [Update](#)

Click into the order and send a Pick List in Order Actions.

**Shipment Tracking**

[Add Tracking Info](#)

Click into the order to add Tracking Info.

Order	Date	Status	Total	Actions	Shi
#25705 Rashawn Gibbs	1 hour ago	Processing / Fulfill...	\$1,550		-

You may also add tracking in the Actions column in the order list.

Order	Date	Status	Total	Actions	Shipment Tracking	ID
#25705 Rashawn Gibbs	1 hour ago		\$1,550		UPS TEST21342142112214	25705

Order marked complete and UPS tracking is visible.