



***HOW TO
Administer Order
Processing***

Revision 1.1



Miva Corporation
2629 Ariane Drive
San Diego, CA 92117

Telephone: 858-490-2570

Telefax: 858-490-0548

<http://www.miva.com>

info@miva.com

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PN - MM1053-02 (ver. 3.00)

HOW TO

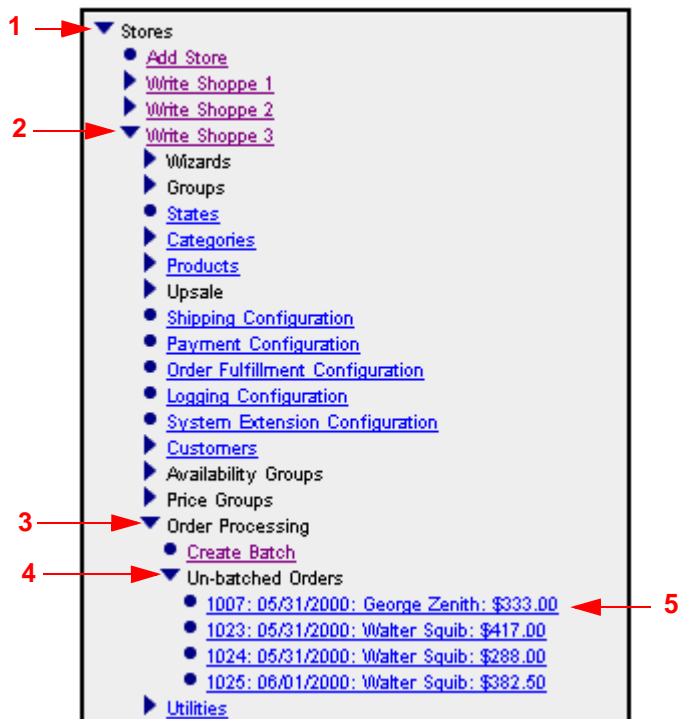
Administer Order Processing

Introduction

Customer orders should be processed on a regular basis. You can create batches of orders and then download them for tracking and accounting purposes. How often you will create a batch of orders to be downloaded depends on the volume of your store. It could be weekly for a small, low-volume store, or it may be daily for a higher volume store. This decision should be made after careful consideration of your order volume and should be checked regularly.

Processing Orders

All orders go into the Un-batched Orders list.



Use the following procedure to create a batch of orders.

1. Click on the triangle next to Stores.
2. Click on the triangle next to the store name.
3. Click on the triangle next to the Order Processing.
4. Click on the triangle next to Un-batched Orders list that appears.
5. Click on an order link to view or edit information.

Edit Order: #1007

Customer Information [Order Information](#) [CyberCash Payment Services](#)

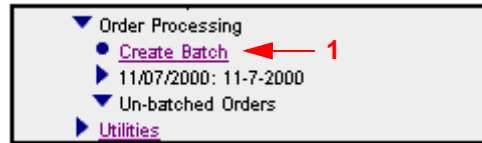
Ship To:		Bill To:	
First Name:	George	First Name:	George
Last Name:	Zenith	Last Name:	Zenith
Email Address:	walter@miva.com	Email Address:	walter@miva.com
Phone Number:	490-2570	Phone Number:	490-2570
Fax Number:		Fax Number:	
Company:		Company:	
Address:	2629 Ariane Dr	Address:	2629 Ariane Dr
City:	San Diego	City:	San Diego
State:	CA	State:	CA
Zip/Postal Code:	92117	Zip/Postal Code:	92117
Country:	US	Country:	US

The Edit Order form has the following links:

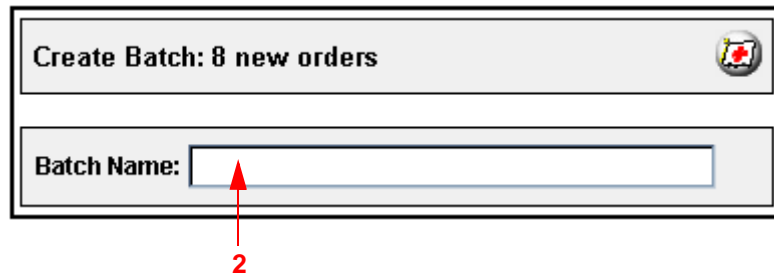
1. **Customer Information**
View the customer information and verify that the data entered is valid. You may edit the information if needed.
2. **Order Information**
View what products or services the customer has ordered. You can also verify that the tax, shipping information and the total are correct.
3. **Payment Information**
View the credit card or check information. Click on the payment type link to display the payment information.

Create Batch

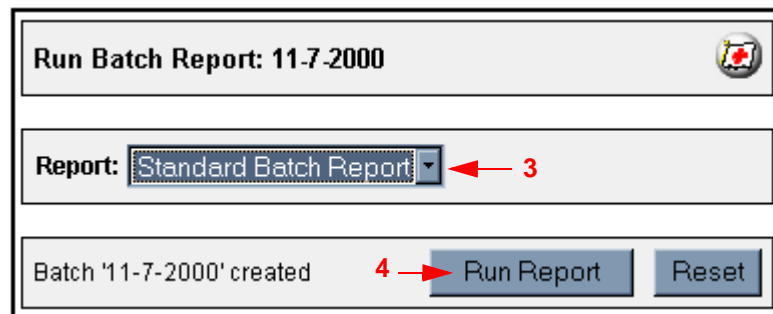
Use the following procedure to make a batch of orders from the Un-batched list.



1. Click Create Batch and give your order batch a name in the field provided



2. Enter the name of the batch in the Batch Name field.
Once you have named your new batch you will be able to run a report on the batch of orders and begin processing them.



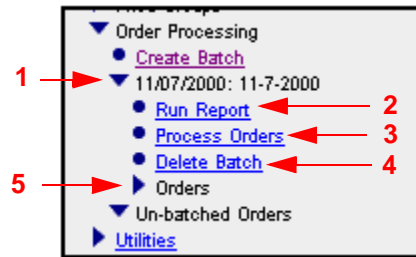
3. Click the drop-down list and select Standard Batch Report.
4. Click Run Report.

The Standard Batch Report shows the order information. Each order has the information shown in Order #1007 in the figure below.

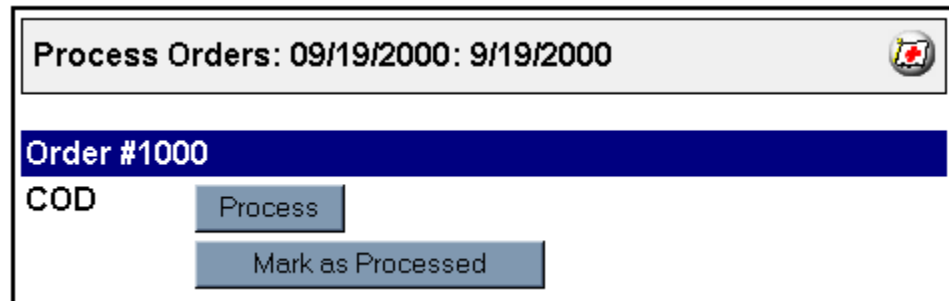
Standard Batch Report			
Order #1007			
Ship To:		Bill To:	
Name:	George Zenith	Name:	George Zenith
Email Address:	walter@miva.com	Email Address:	walter@miva.com
Phone Number:	490-2570	Phone Number:	490-2570
Fax Number:		Fax Number:	
Company:		Company:	
Address:	2629 Ariane Dr San Diego, CA 92117 US	Address:	2629 Ariane Dr San Diego, CA 92117 US
Shipping Information:		Payment Information:	
Shipping Method: Base Charge		CyberCash	
Code	Product	Quantity	Price/Ea. Total
LI	Limoges Inkwell	1	\$225.00 \$225.00
CGI	Cut Glass Inkwell	1	\$45.00 \$45.00
WP	Wood Pens	1	\$60.00 \$60.00
KBLO	Koala Bear Letter Opener (Special Offer) Color: Dark Brown	1	\$0.00 \$0.00
			<i>Shipping: Base Charge:</i> \$3.00
			<i>Sales Tax:</i> \$0.00
			Total: \$333.00
Order #1023			
Ship To:		Bill To:	
Name:	Walter Squib	Name:	Walter Squib
Email Address:	walter@miva.com	Email Address:	walter@miva.com

When you create the new batch of orders, those orders are cleared out of the Un-batched Orders list. The new batch name is displayed below the Create Batch link.

After the Batch has been created you can perform certain tasks.



1. Click the triangle next to the batch name.
2. Click Run Report link to create a Batch Report.
3. Select Standard Batch Report and Click Run Report.
4. Click Process Orders and the screen below displays information about an order:



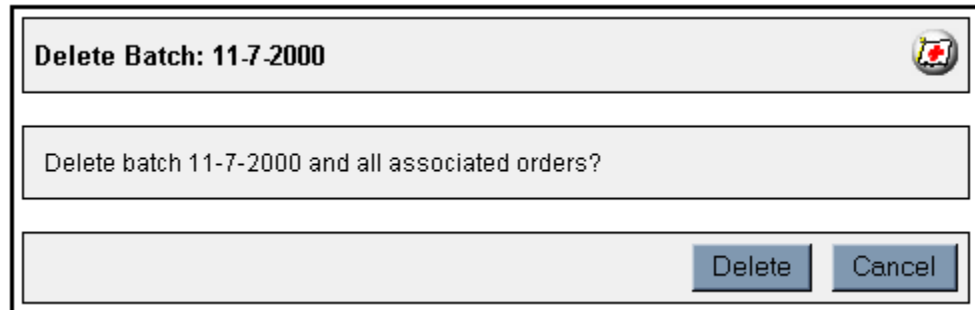
Next to each of the order listings are Process and Mark as Processed buttons. Depending on which payment module(s) your store is using, the system will do different things with the information in each order that it processes for you. If your store does not use any of the third-party payment processing services but you do use one or both of the Credit Card Payment With Simple Validation or Check Payment modules, there is no difference between what happens by clicking either button. The system is only making a mark on the order and not actually billing a credit card account.

The payment processing modules that interface with remote processing servers do credit card validation at the point of entry at the time the order is placed (`merchant.mv`).

Payment processing does not actually bill the credit card until the order is processed in the stores administration interface (`admin.mv`). After processing (or marking as processed) a given order in a batch, the order disappears from the Un-batched Orders list. The "Process" and "Mark as Processed" buttons will not appear on the form once the order has been made part of the batch.

The only case where clicking the Process button results in any transfer of funds is when the CyberSource Payment Services or CyberCash module is in use.

5. Click Delete Batch to remove the batch with all of its orders completely from the system. You can also view or edit orders in the batch by clicking on any order listing in the Orders section of the batch menu.



The screenshot shows a dialog box titled "Delete Batch: 11-7-2000" with a red 'X' icon in the top right corner. The main text of the dialog asks, "Delete batch 11-7-2000 and all associated orders?". At the bottom right, there are two buttons: "Delete" and "Cancel".

6. Click the triangle next to Orders to display a list of the orders in the batch. You can click on the link for any order and review the order data and change it if necessary.