

Web Link Help File: Incomplete Orders

Abstract

- This help file will illustrate how to view incomplete orders resulting from lost sales, saved orders or exceeded credit.

Procedure

- 1) Sign into the site as website administrator user.
- 2) Select "Incomplete Orders" from the Order Status menu. (fig. 1)



fig. 1

- 3) Choose one of the three available reports. (fig.2)
 - Lost Sales: Presents a list of all sales lost due to out of stock items
 - Saved Orders: Provides a list of all orders saved by customers
 - Credit Exceed: Lists all orders on hold due to exceeded customer credit.

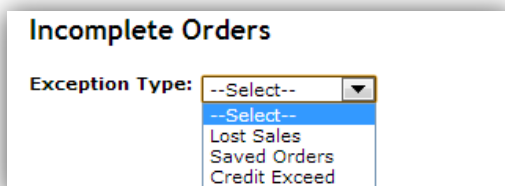


fig. 2

- 4) The Lost Sales report displays a list of all parts that were reported as out of stock by a customer. Once the part becomes available the customer can be notified by clicking on their email address. An email notification, which can be viewed and edited from the Email Templates page, is sent automatically to the email address listed. (fig. 3)


Part#	Line Code	Quantity	Customer Number	Customer Name	Phone	City	Date	Email	Select
51515	DOR	1	DEFAULT	Anonymous Anonymous	1234567891	test	8/25/2011	test@test.com	

fig.3

- 5) The Saved Orders page allows the administrator user to search for all currently saved orders or only orders saved within a selected date range. Once the "view all orders" button has been selected or a date range has been set and the "find" button has been selected, a list of saved orders is presented complete with customer account numbers, dates the orders were created and order totals.(fig.4)

Incomplete Orders

Exception Type: Saved Orders

Date From: 02/01/2012 To: 10/31/2012
(mm/dd/yyyy) (mm/dd/yyyy)

Find View All Orders

Export To Excel / Print

Orders between 02/01/2012 and 10/31/2012




Customer Number	Shopping Cart Name	PO Number	Date Created	Email	#Item	Order Total	View	Delete
DEFAULT	My Shopping Cart		10/30/2012	support@weblinkcorp.com	1	\$5.75	View	
DEFAULT	My Shopping Cart		10/13/2012	support@weblinkcorp.com	2	\$10.77	View	
DEFAULT	My Shopping Cart	12345	2/22/2012	test123@weblinkcorp.com	1	\$37.17	View	

fig.4

- 6) Clicking on the email address will open the default email program installed on the administrator's computer allowing them to contact the customer about the order. Clicking on the "view" link will load the invoice for the order allowing the administrator to view the parts saved within the order. (fig. 5 and 6).

Customer Number	Shopping Cart Name	PO Number	Date Created	Email	#Item	Order Total	View	Delete
DEFAULT	My Shopping Cart		10/30/2012	support@weblinkcorp.com	1	\$5.75	View	
DEFAULT	My Shopping Cart		10/13/2012	support@weblinkcorp.com	2	\$10.77	View	
DEFAULT	My Shopping Cart	12345	2/22/2012	test123@weblinkcorp.com	1	\$37.17	View	

fig.5

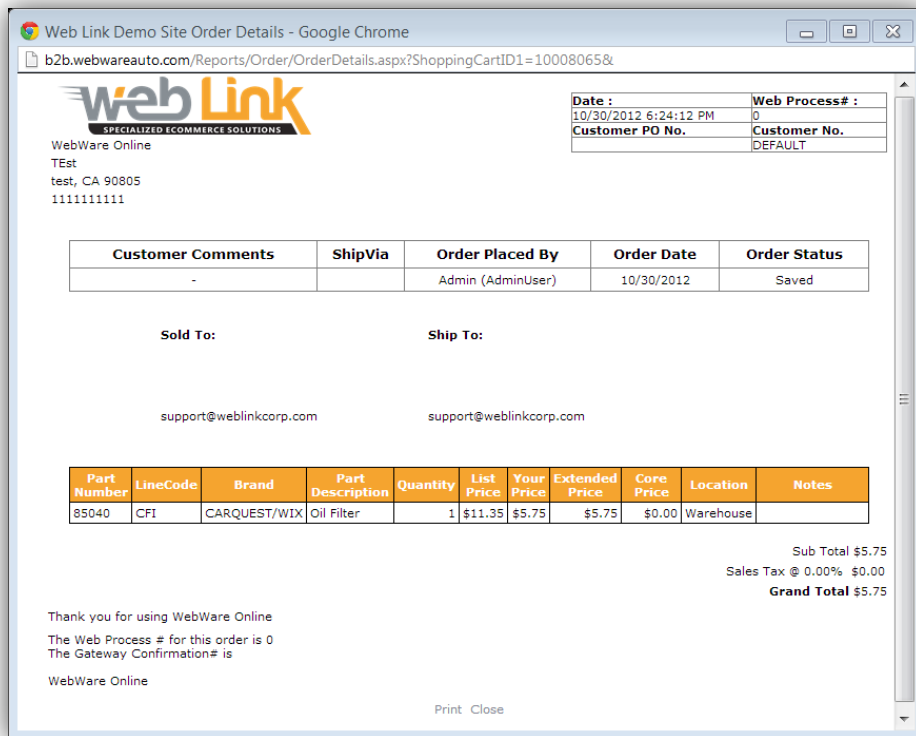


fig.6

- 7) The Credit Exceed option loads all of the outstanding orders within a selected date range that are placed on hold due to exceeded credit limits. Once the accounts have been reconciled the order can be placed by clicking on the "retry" link.

