



# ***HOW TO Administer Order Processing***

Revision 1.3



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MM1053-04 (Rev. 1.3) Miva Merchant 4.14 and above

# *HOW TO*

## Administer Order Processing

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### 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.

### Set Up Order Processing

By now, you have already set up several items that are associated with an order, such as the ones listed below.

- Order Fulfillment, with Email Merchant Notification, Customer Order Confirmation Email, or both. (Order Fulfillment is not required, but is helpful.)
- Customer Information, including the Ship To and Bill To data.
- Payment Configuration, with a payment gateway, simple credit card validation, COD, or other payment selection. (Required.)
- Shipping Configuration (unless your store provides a service or electronic distribution.)
- Miva Mailer to allow your customer to subscribe to your mailing lists, such as a newsletter or special promotions. (Optional)

Customer Information, Order Information (products, prices, quantities shipping charge, sales tax and totals) and Payment Information are included in each order.

You may also want to set up additional security for your customers payment information. The payment data of an order may be encrypted. In order for you to activate Encryption, your Internet Host Provider must have SSL running and available to your store.

### Encryption (new in 4.14)

Activating Encryption secures the payment data within your customer's order. The Checkout process and the Order Information screens that your customers see in the Store are the same with and without Encryption activated. However, you might want to add in the Header of an Order Information page that the payment data is secure and encrypted (if you decide to activate it).

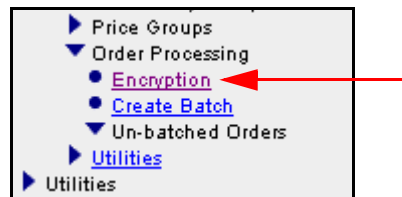
When Encryption is activated, the data passed from the payment module (selected in Payment Configuration) to the order will be encrypted. (The actual data varies, depending upon the payment configuration, but usually includes the credit card account number, name on card, transaction number, and other module-related data.) Encryption converts the data into unreadable text (ciphertext), and secures the payment data so that it can be viewed only by entering a pass phrase.

## Activate Encryption (new in 4.14)

**Note:** Your host must have SSL running and available to your store to activate Encryption.

Only new orders are affected by the changes you make to encryption. Activating encryption or changing the pass phrase will not affect existing orders.

1. Click the triangle next to Stores.
2. Click the triangle next to your store's name.
3. Click the triangle next to Order Processing.
4. Select the Encryption link.



The Encryption form displays.

 A screenshot of the 'Encryption' settings form. The form has a title bar 'Encryption' with a globe icon. Below the title bar is a 'Settings' section. It contains a checkbox labeled 'Activate Encryption' which is currently unchecked. Below the checkbox are three text input fields: 'Encryption Prompt:', 'Encryption Pass Phrase:', and 'Verify Encryption Pass Phrase:'. At the bottom right of the form are two buttons: 'Update' and 'Reset'.

5. Check the box next to Activate Encryption.
6. Enter an Encryption Prompt.  
The prompt is a private clue to help you remember your Encryption Pass Phrase. If nothing is entered, it will default to "Enter Pass Phrase #1", for example.
7. Enter the Encryption Pass Phrase. This should be fairly long for the best security.  
You might enter a quote, the names of your favorite teachers, or even your favorite dog breed(s), with some symbol characters tacked on; as long as it is something that you will remember! It must be at least eight characters.
8. Reenter the phrase in the box next to *Verify Encryption Pass Phrase*.

**Caution:** **Lost Pass Phrases cannot ever be recovered.**  
**Encrypted order information can be viewed only with the Pass Phrase.**

**Retain your pass phrase. You might save it in a secure area on your local system, or print it and file it.**

9. Click Update.

Orders that are placed from this point forward will be encrypted with the pass phrase you just entered. Previously placed orders are not affected: existing orders that were not encrypted, will still not be encrypted; existing orders that have a different pass phrase will retain the pass phrase they were given.

When Encryption has been activated, you must enter the proper pass phrase to perform any of the following activities:

- edit an order
- batch order processing
- run batch reports

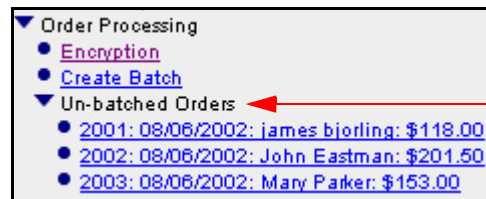
If you want to change the pass phrase (which should be done on a regular basis, similar to changing passwords on a network), make sure all orders are batched first. This way you will have only one pass phrase to remember for each batch of encrypted orders.

## Un-batched Orders

Each order a customer places is initially listed under Un-batched orders, with the following information:

- order number
- date
- name (Ship To)
- total order amount

Un-batched orders looks like this:



Use the following procedure to view the Un-batched orders list.

1. Click the triangle next to Order Processing.
2. Click the triangle next to Un-batched Orders.
3. Select an order to view or edit information.

## Edit Order

The data in the Customer and Order Information tabs are editable. Some data in the Payment Information form are also editable; it depends on the payment module you selected in Payment Configuration. The Edit Order form contains the following items:

### Customer Information Tab

View the customer information and verify that the data entered is valid. You may also edit this information, for example, if a customer notifies you of a change of address or a typo.

- **Edit Customer button**

If you want to permanently change customer information, click the Edit Customer button. (Any changes you make within the Edit Order forms, apply only to the selected Order, and not the Customer record.)

- **Printable button**

If you want to print the combined Customer, Order, and Payment Information, the Printable form is designed for printing. See [“Printable Order”](#) [“Printable Order”](#) on page 5.

**Edit Order: #1005**

Customer Information [Order Information](#) [Check Payment](#)

Ship To:	Bill To:
First Name: <input type="text" value="Lisa"/>	First Name: <input type="text" value="Lisa"/>
Last Name: <input type="text" value="Rachal"/>	Last Name: <input type="text" value="Rachal"/>
Email Address: <input type="text" value="elise@miva.com"/>	Email Address: <input type="text" value="elise@miva.com"/>
Phone Number: <input type="text" value="858-731-4200"/>	Phone Number: <input type="text" value="858-731-4200"/>
Fax Number: <input type="text"/>	Fax Number: <input type="text"/>
Company: <input type="text"/>	Company: <input type="text"/>
Address: <input type="text" value="5060 Sante Fe Street"/>	Address: <input type="text" value="5060 Sante Fe Street"/>
City: <input type="text" value="San Diego"/>	City: <input type="text" value="San Diego"/>
State: <input type="text" value="CA"/>	State: <input type="text" value="CA"/>
Zip/Postal Code: <input type="text" value="92109"/>	Zip/Postal Code: <input type="text" value="92109"/>
Country: <input type="text" value="US"/>	Country: <input type="text" value="US"/>

Printable Edit Customer

**Printable Order**

You might want to print each order as a backup for your files. It contains all the fields of your customer's order. However, if the order is encrypted, you must enter the pass phrase before the Payment Information will be visible and printable.

<b>Order #2002</b>			
<b>Date Of Order: 08/12/2002</b>			
<b>Time Of Order: 10:48:54 Pacific Daylight Time</b>			
<b>Ship To:</b>		<b>Bill To:</b>	
james bjourling		james bjourling	
JBjourling@miva.com		JBjourling@miva.com	
858-321-4321		858-321-4321	
Sound Stereo		Sound Stereo	
1 somewhere street		1 somewhere street	
Toronto, Ontario M4B 2C3		Toronto, Ontario M4B 2C3	
CA		CA	
<b>Shipping Information:</b>		<b>Payment Information:</b>	
Shipping Method: Domestic		Authorize.Net	
		Name On Card: James Bjourling	
		Card Number: 4111111111111111	
		Expiration Date: 6/2004	
		Transaction ID: 0	
		Authorization Code: 000000	
		AVS Code: P	
		Time: 08/12/2002 - 10:48:53 Pacific Daylight Time	
<b>Code</b>	<b>Product</b>	<b>Quantity</b>	<b>Price/Ea. Total</b>
NP-NP2	Daffodil Note Paper	1	10.00 10.00
NP-NP3	Daisy Note Paper	1	14.00 14.00
PH-03	Yellow Daisy Pen & Pencil Cup	1	35.00 35.00
ODI-23	Flowery Note Paper Box	1	47.00 47.00
			<i>Shipping: Domestic:</i> 8.00
			<i>Sales Tax:</i> 0.00
			<b>Total: 114.00</b>

**Order Information Tab**

View what products or services the customer has ordered. The form also displays the shipping, tax, and total order amounts, which are editable.

<b>Edit Order: #2008</b> 				
<a href="#">Customer Information</a> <b>Order Information</b> <a href="#">Authorize.Net Payment Services v3.0</a>				
Code	Product	Quantity	Price/Ea.	Total
I-02	Cut Glass Inkwell	1	75.00	75.00
NP-NP4	Pastel Note Paper	2	12.50	25.00
			Shipping: Domestic:	<input type="text" value="8.00"/>
			Sales Tax:	<input type="text" value="7.50"/>
<b>Total:</b>				<input type="text" value="115.50"/>

**Payment-Type Tab**

The name of this tab is the actual name of the payment type that you selected in Payment Configuration.

The actual data, and whether or not it is editable, also varies, and depends on the payment type.

<b>Edit Order: #2008</b> 	
<a href="#">Customer Information</a> <a href="#">Order Information</a> <b>Authorize.Net Payment Services v3.0</b>	
<b>Method:</b>	CC
<b>Name on Card:</b>	John Eastman
<b>Card Number:</b>	4111111111111111
<b>Expiration:</b>	5/2004
<b>AVS Code:</b>	P
<b>Transaction ID:</b>	0
<b>Response Reason Text:</b>	This transaction has been approved.
<b>Authorization Code:</b>	000000
<b>Authorization Date &amp; Time:</b>	08/23/2002 11:47:17 Pacific Daylight Time

If you activated encryption before this order was placed, you will usually not see the Payment tab. (It displays if you use Credit Card Payment With Simple Validation, for example.) See ["View Encrypted Orders"](#) on page 7.

## View Encrypted Orders

The differences between an encrypted order and one that is not encrypted, is that with encryption, you will see the following when you select the encrypted order:


- Usually no Payment-Type tab displays
- Your pass phrase prompt
- Text box to enter your pass phrase
- Lock button by the text box

The lock indicates that this order contains encrypted payment information.

- Encryption message at the bottom of the form

You will not be able to view the payment data until you enter your pass phrase. The payment module name may display, depending on the module. See “[Unlock Encrypted Order](#)” on page 8.

**Your Prompt** → **Enter Your Pass Phrase**

Sisters Full Name and Syms:   **Lock**

**Customer Information** [Order Information](#) ← **Payment Information link may or may not display**

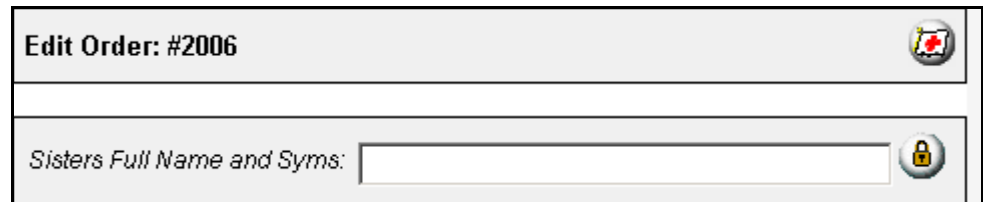
Ship To:		Bill To:	
First Name:	<input type="text" value="John"/>	First Name:	<input type="text" value="John"/>
Last Name:	<input type="text" value="Eastman"/>	Last Name:	<input type="text" value="Eastman"/>
Email Address:	<input type="text" value="JohnEastman@miva.co"/>	Email Address:	<input type="text" value="JohnEastman@miva.co"/>
Phone Number:	<input type="text" value="858-321-4321"/>	Phone Number:	<input type="text" value="858-321-4321"/>
Fax Number:	<input type="text"/>	Fax Number:	<input type="text"/>
Company:	<input type="text" value="Sound Stereo"/>	Company:	<input type="text" value="Sound Stereo"/>
Address:	<input type="text" value="2 Sound Place"/>	Address:	<input type="text" value="2 Sound Place"/>
City:	<input type="text" value="San Diego"/>	City:	<input type="text" value="San Diego"/>
State:	<input type="text" value="CA"/>	State:	<input type="text" value="CA"/>
Zip/Postal Code:	<input type="text" value="92109"/>	Zip/Postal Code:	<input type="text" value="92109"/>
Country:	<input type="text" value="US"/>	Country:	<input type="text" value="US"/>

Payment data encrypted. Enter pass phrase to view.

**Message** →

## Unlock Encrypted Order

When an order contains encrypted payment information, you see your encryption prompt, a text box for the pass phrase, and a lock near the top of the form.



The screenshot shows a web form titled "Edit Order: #2006". Below the title bar, there is a text input field with the placeholder text "Sisters Full Name and Syms:". To the right of the text box is a circular button with a lock icon, indicating that the form is currently locked.

The payment information will not display until you enter the pass phrase.

1. Enter the pass phrase in the text box next to your encryption prompt.
2. Click the lock button, or click Update (if you have made changes), otherwise click Reset.

The assigned payment module's Payment Information can now be viewed.

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**Caution:** Remember your Pass Phrase. Lost Pass Phrases cannot be recovered. Encrypted order information can be viewed only with the Pass Phrase.

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3. Select the Payment Information tab.

The encrypted payment information will be viewable after you enter your pass phrase, and remains viewable until you do one of the following to lock it again:

- click the unlocked button
- click a link outside this order

If you go back to the same order form, you must enter the pass phrase again to view the encrypted payment information.

## Create Batch

If you selected “Authorize only” (the actual wording may vary in your payment module) in the Payment Configuration, the credit or debit card will be charged when you Process Orders. But, first you need to batch the orders.

Creating a batch of orders provides a way for you to manage them, grouping them together in order to process orders, run reports, export data, and delete orders by batch.

When you create a batch, all the Un-batched Orders will be placed in the batch. Use the following procedure to make a batch of orders from the Un-batched list.

1. Select the Create Batch link.



2. Enter the name you want for the batch.  
Enter a name that is meaningful in the way you process or handle your batched orders. (The batches are automatically ordered by date.)

 A screenshot of a web form titled 'Create Batch: 8 new orders'. The form has a header bar with the title and a small icon on the right. Below the header is a text input field labeled 'Batch Name:'.

If no orders have been placed since the last batch, a message displays indicating there are no new orders.

3. Click the Create button.  
When the batch has completed, the Run Batch Report form automatically displays. (See “Run Report” on page 10.)

## Run Report

After a batch is created, you will be able to run a report on the batch of orders at any time.

**Note:** If you just created a batch, the Run Batch Report form automatically displays.

1. If the Run Batch Report form is not displayed, click the triangle next to the batch you want.
2. Select the Run Report link in the Administration Interface menu.



3. If you have encrypted payment information, you will see a form with your encryption prompt. Enter your pass phrase in the box next to your encryption prompt.

A screenshot of the 'Run Batch Report: Week3' form. The form has a title bar with a red cross icon. Below the title bar, there is a text input field labeled 'Sisters Full Name and Syms:' with a red arrow pointing to it from the text 'Encryption Prompt'. Below this field is a dropdown menu labeled 'Report:' with the text '<Select One>' and a dropdown arrow.

If you do not have encrypted orders, you will see a form similar to the following.

A screenshot of the 'Run Batch Report: 11-7-2000' form. The form has a title bar with a red cross icon. Below the title bar, there is a dropdown menu labeled 'Report:' with the text 'Standard Batch Report' and a dropdown arrow. At the bottom of the form, there is a status bar that says 'Batch '11-7-2000' created' and two buttons: 'Run Report' and 'Reset'.

4. Select the report you want to run from the Report list. (Miva Merchant comes with only the Standard Batch Report. You may see other reports if you have 3rd party order processing modules installed.)
5. Click the Run Report button.

The Standard Batch Report shows the order information for each order in the batch. Each order has similar information to that shown in the order below.

Order #Z003				
Ship To:		Bill To:		
<b>Name:</b>	Dot Comley	<b>Name:</b>	Dot Comley	
<b>Email Address:</b>	Doteeee4@miva.com	<b>Email Address:</b>	Doteeee4@miva.com	
<b>Phone Number:</b>	716-245-0000	<b>Phone Number:</b>	716-245-0000	
<b>Fax Number:</b>		<b>Fax Number:</b>		
<b>Company:</b>		<b>Company:</b>		
<b>Address:</b>	194 Cypress St Rochester, NY 14620 US	<b>Address:</b>	194 Cypress St Rochester, NY 14620 US	
Shipping Information:		Payment Information:		
<b>Shipping Method:</b> Domestic		<b>ICS2</b>		
	<b>Card Holder:</b>	Dot Comley		
	<b>Card Number:</b>	411111		
	<b>Expiration Date:</b>	6/2004		
	<b>Authorization Request ID:</b>	10299537355712886805552		
	<b>Amount Authorized:</b>	122.00		
	<b>AVS Code:</b>	Y		
	<b>Authorization Code:</b>	123456		
	<b>Authorization Date/Time:</b>	2002-08-21T180857Z		
Code	Product	Quantity	Price/Ea.	Total
ODI-23	Flowery Note Paper Box	2	\$47.00	\$94.00
NP-NP2	Daffodil Note Paper	2	\$10.00	\$20.00
			<i>Shipping: Domestic:</i>	\$8.00
			<i>Sales Tax:</i>	\$0.00
			<b>Total:</b>	<b>\$122.00</b>

The Payment Information section details will vary, depending upon which Payment module is reporting the information.

**Note:** If you deactivated any payment modules, the payment information area will be blank. Activate the payment module, then rerun the report.

## Process Orders

If you set up the Payment Configuration to “Authorize Only” (verifies, but does not charge the card when the customer’s order is placed), Process Orders will “Capture” the funds (notify the payment gateway to charge or debit the card).

If you use the Credit Card Payment with Simple Validation, COD, Check Payment, or a payment module that does not have an Authorize Only option, the selections Process and Mark Processed simply mark the order as processed and do not send any information to a gateway.

1. Click the triangle next to the batch you want to process.



2. Select Process Orders.
3. If the batch contains encrypted payment information, your Encryption Prompt and text box display at the top of the form. Enter the pass phrase(s).







If you attempt to process or mark as processed any of the orders before entering the pass phrase, an error message displays at the bottom of the form, and the checked orders will not be processed, or marked as processed.

<b>Process Orders: 08/21/2002: Week3</b>		
<hr/>		
<i>Sisters Full Name and Syms:</i> <input type="text"/>		

4. Click the box next to the fields you want to display, then click the Refresh button.

<b>Display:</b>	<input checked="" type="checkbox"/> ID	<input checked="" type="checkbox"/> Date	<input type="checkbox"/> Ship. First Name	<input type="checkbox"/> Ship. Last Name
	<input type="checkbox"/> Ship. Email	<input type="checkbox"/> Ship. Phone	<input type="checkbox"/> Ship. Fax	<input type="checkbox"/> Ship. Company
	<input type="checkbox"/> Ship. Address	<input type="checkbox"/> Ship. City	<input type="checkbox"/> Ship. State	<input type="checkbox"/> Ship. Zip
	<input type="checkbox"/> Ship. Country	<input type="checkbox"/> Bill. First Name	<input type="checkbox"/> Bill. Last Name	<input type="checkbox"/> Bill. Email
	<input type="checkbox"/> Bill. Phone	<input type="checkbox"/> Bill. Fax	<input type="checkbox"/> Bill. Company	<input type="checkbox"/> Bill. Address
	<input type="checkbox"/> Bill. City	<input type="checkbox"/> Bill. State	<input type="checkbox"/> Bill. Zip	<input type="checkbox"/> Bill. Country
	<input checked="" type="checkbox"/> Total	<input checked="" type="checkbox"/> Method	<input type="checkbox"/> Card Type	<input type="checkbox"/> Name on Card
	<input type="checkbox"/> Card Number	<input type="checkbox"/> Expiration Date	<input type="checkbox"/> Expiration	<input type="checkbox"/> Reference Number

5. If you want to edit an order, click the Edit Order button. (See [“Edit Order”](#) on page 4.)

Process		Order Module	Method	Amount	
✓+	✓-				
<input type="checkbox"/>		2001 Innovative Gateway Solutions	Innovative Gateway Solutions	67.00	 <b>Edit Order</b>
<input type="checkbox"/>		2002 CyberSource ICsv2 Payment Services	ICS2	115.50	
<input type="checkbox"/>		2003 CyberSource ICsv2 Payment Services	ICS2	188.00	
<input type="checkbox"/>		2005 CyberSource ICsv2 Payment Services	ICS2	122.00	
<input type="checkbox"/>		2006 CyberSource ICsv2 Payment Services	ICS2	80.56	
<input type="checkbox"/>		2007 CyberSource ICsv2 Payment Services	ICS2	65.00	

6. Check the box next to each order you want to process or mark as processed. Or, click **+** to check all orders.
7. Click either the Process or Mark Processed button.
- 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. (See the **“Process Orders”** sections below)
- After processing finishes, the orders that were processed are removed from the Process Orders list.

#### **Process Orders: with no Payment Processing Service**

If your store does not use a payment processing service (a payment gateway, for example), but instead uses 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 Process or Mark Processed. The system is only making a mark on the order and not actually sending information to bill a credit card or debit an account.

#### **Process Orders: with Payment Processing Service**

The payment processing modules that interface with remote processing servers perform a credit or debit card validation (Authorization) at the time your customer's order is placed.

If you set up your payment module in Payment Configuration to “Authorize Only” (the actual wording may vary in your payment module), the credit or debit card is not charged or deducted until you process those orders.

- Clicking the Process button notifies the payment gateway that it is time to bill the credit card or debit the account.
- Clicking the Mark Processed, marks the orders, in the cases where you have already processed the order using another method (such as phone or terminal).

## Delete Batch

Before deleting a batch, you might want to archive your orders. You can

- Print specific Customer Orders
- Print the Standard Batch Report
- Export the Order data

Refer to the guide, *HOW TO Export Data to an Outside File*.

1. Under Order Processing, click the triangle next to the Batch of orders you want to delete.



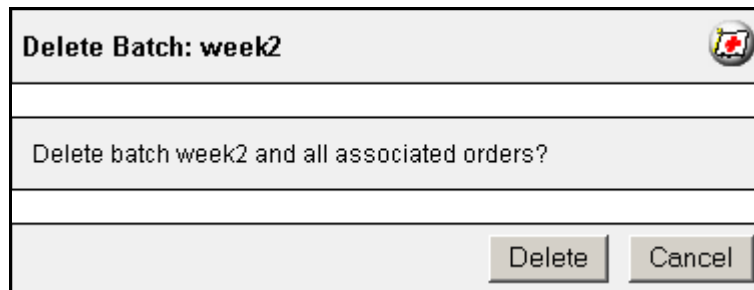
**Caution:** Before deleting your batched orders, you may want to archive the orders. You can print your orders for a hard copy, and you can export them.

See [“Printable Order” on page 5](#) if you want to retain a printout of an individual order. If you want to export your batched orders, see the guide *“Export Data to an Outside File.”*

2. Select Delete Batch.

This will remove the batch with all its orders completely from the system.

The following warning displays.



3. Click Delete to permanently remove the batch, or click cancel to retain the batch.