

## **Billing & Invoices**

Stores all current and past orders that have been made through the site, including billing and shipping information

### ***View Orders Tab***

Lists all of the current and past orders; click Edit on a person's name in order to get the full information

#### *Overview*

Gives an overview of the order. You can change the status of the order by changing this in the drop-down. You can also view the subtotal, tax, shipping, etc.

#### *Tracking*

Allows you to enter the tracking number and shipping provider for a specific order; for internal use only, this does not email the user.

#### *Invoices*

This tab would only apply if you have access to Billing Plans; this is where the individual invoices will show up

#### *Promotions*

If promotions have been created, this is where you link them to the individual items.

#### *Billing*

Lists the customer's billing information

#### *Shipping*

Lists the customer's shipping information

#### *Comments*

Allows you to post comments on this particular order or about this particular customer (customer frequently calls to cancel order, make sure to ship to correct address, customer was irate on the phone, etc. This is only viewable inside the ISM.)

## ***Billing Plans Tab***

Allows payment plans to be set up so that the ISM automatically charges the customer at set intervals.

## ***Reports Tab***

Allows you to run reports on the store to see how much money was generated through online sales

### *Running Reports*

1. To run a report, select the type of report from the drop-down.
  - a. Overall Sales – this will run a report based on overall sales. The report breaks it down into tax, shipping & handling, promotions, item options, etc.
  - b. Item Breakdown – runs a report and shows you how much money was made on each item in the store
  - c. Orders – shows each individual item that was purchased through the store
2. Enter the Start and End dates of when you want the report to run.
3. Click Run Report.
4. You can change the criteria and run as many reports as needed.
5. You can also print the report by clicking on the print icon in the top right.