

Beauty Advisor > Orders / list - viewing and handling orders

/ Getting started

The **Orders / List** section in the Beauty Advisor module contains a table **(4)** with a list of all correctly processed and accepted BA orders (for more information on processing and accepting orders, see [Beauty Advisor > New order - description of the ordering process](#)). The table is susceptible to sorting, it allows you to change order shipment statuses, preview orders, export orders and generate labels. With the help of filters, you can extract orders that meet the criteria specified in the **Filters** section **(3)**, described in the [Filters](#) chapter.

Remember

BA Order - An order placed by BA consultants in the Beauty Advisor module that has been accepted by a BA customer. For more information on accepting BA orders, see [Beauty Advisor > New order - description of the ordering process](#). For information on BA consultants and BA clients, see [Beauty Advisor - getting started](#).

Table of contents:

- [Generating a CSV file with orders and printing labels for the courier](#)
- [Filters](#)
- [Viewing and handling BA orders](#)

/ Generating a CSV file with orders and printing labels for the

courier

In the **Orders / list** section, you can perform 2 mass operations:

The screenshot displays the 'Orders / list' section of the Beauty Advisor module. At the top, there are two buttons: 'Generate CSV file for courier' (circled with 1) and 'Print all' (circled with 2). Below these is a 'Filters' section (circled with 3). The main area contains a table of orders with the following columns: ID, Processed on, Value, First name, Last name, E-mail, Paid?, Package status, Status, and Actions. The table shows 10 entries, with a search bar and a 'Show 10 entries' dropdown. At the bottom of the table, it says 'Showing 21 to 30 of 229 entries'. On the left, there is a sidebar menu (circled with 4) with various navigation options like General, Contacts, Orders / list, Pending orders, New order, POS retail, etc.

Orders / list section in Beauty Advisor module

1. Generate a list of orders for the courier in CSV format by selecting the **Generate CSV file for courier** button (1). After selecting the button, the application generates a csv file and takes you to the operation summary view, where you can download the file to a local disk, using the **Download file** button.

File has been exported

Type of export: Export: BA Courier File Export

Filename: ba_courier_file_2020_12_17_132609.csv

File has been successfully exported. You can now download your file.

 Download file

A message with a summary of the operation

Remember

You can generate a list of all orders for the courier only for orders with the status **“Ready to be sent”**.

Note

After generating the file, orders with the status **“Ready to be sent”** will change their status to **“Sent”**.

2. Generate an order label using the **Print all** button **(2)**. The application generates a PDF file and displays the generated labels, the options are: downloading the file to a local disk or printing directly.

17.12.2020

Order - PL4VPI4002849

Products

Identifier	Product name	Quantity	Unit price	Total amount
69393	Mleczko w sprayu do opalania z wyciągiem z mikołajka nadmorskiego SPF 50	1	75.00 zł	75.00 zł
95429	Mini zestaw Oui à l'Amour	1	34.90 zł	34.90 zł

Generated label

Remember

You can generate a list of all orders only for orders with the status **“Waiting for preparation”**.

Note

After generating the file, orders with the status **“Waiting for preparation”** will change their status to **“Under preparation”**.

/ Filters

The **Filters** tab allows you to select orders in terms of the criteria described below. Orders that meet the selected criteria will be displayed in the **Orders / list** tab.

Filters

Processed on From: To:

Order value From: To:

Status

Package status

Delivery method

Payment method

Deferred payment status

Check status

Paid?

Customer ID

Only with vouchers

Apply filters Clear filters

Filters tab in section Beauty Advisor > Orders / list

- **Processed date** - the date range during which the order was registered in the application.
- **Order value** - the scope of the order value.
- **Status** - order status (available: "New", "Processing", "Sent", "Delivered", "Returned", "Cancelled", "Delivery failure", "Shipping in progress"). System parameters are verified and changed automatically by the application. For more information on order statuses, see [Beauty Advisor > Orders / list - viewing and handling orders](#).
- **Package status** - shipment status in the **Beauty Advisor** module. The BA consultant can manually change each status.
 - **Waiting for preparation** - status assigned automatically by the application, after placing the order, only when the COD (cash on delivery) form of payment has been

selected. If another form of payment is chosen, the shipment will be given the status “**Waiting for payment**”. The shipment status automatically changes to “**Under preparation**” when the order label is generated.

- **Waiting for payment** - status assigned automatically by the application, after placing the order, only when the online payment method has been selected. When the order is paid, the shipment status automatically changes to “**Under preparation**”.
- **Under preparation** - Status assigned manually by the BA employee. This status causes a window to show up with a field where the employee has to enter the approximate package weight.
- **Ready to be sent** - a status that can only be set manually.
- **Sent** - status assigned automatically by the application after generating the CSV file for the courier.
- **Delivery method** - Shows available delivery methods. filter value depends on the settings in the administration panel.
- **Payment method** - Shows available payment methods. filter value depends on the settings in the administration panel.
- **Deferred payment status** - the available statuses: “*paid*”, “*overdue*”, “*pending*”.
- **Check status** - order verification status (available “*new*”, “*successfully checked internally*”, “*internal check failed*”, “*successfully exported*”, “*export failed*”, “*successfully processed*”). System parameters, are verified and changed automatically by the application. For more information on order statuses, see [Beauty Advisor > Orders / list - viewing and handling orders](#).
- **Paid?** - option of selecting payment status (COD / DP, paid, preconfirmed *payment*, *waiting for payment*, *canceled*). System parameters, are verified and changed automatically by the application.
- **Customer ID** - unique customer ID. For more information, see [Beauty Advisor > Contacts - viewing and managing BA clients](#).
- **Only with vouchers** - check the checkbox to display orders where the FIDEN2 voucher has been used.

/ Viewing and handling BA orders

Below you will find a description of the table with a list of BA orders and the possible actions in the **Orders / list** tab.

ID	Processed on	Value	First name	Last name	E-mail	Paid?	Package status	Status	Actions
4003007	2020-12-08 10:17:58	19.90 zł	Ada	Kowalska1	robert.rapkowski@tauceti.email	COD/DP	Sent	Przetwarzane	Q Show
4003002	2020-12-07 12:01:26	119.00 zł	Beata	Beithei2Xao6	beithei2xao6@example.com	COD/DP	Under preparation	Przetwarzane	Q Show
4002984	2020-12-03 13:55:25	39.40 zł	Test	Test	4c90978efd...	COD/DP	Ready to be send	Przetwarzane	Q Show
4002971	2020-11-27 13:42:25	38.90 zł	Irmına	Wie4Ahg7Epha	66c139572e...	COD/DP	Under preparation	Przetwarzane	Q Show
4002970	2020-11-27 13:40:40	139.00 zł	Test	Test	27414b2ada...	COD/DP	Ready to be send	Przetwarzane	Q Show
4002969	2020-11-27 13:19:59	39.90 zł	Test135	Test135	ce2ae64672...	COD/DP	Ready to be send	Przetwarzane	Q Show
4002943	2020-11-24 13:48:18	119.00 zł	Kornel	Skapski	27397ec7af...	COD/DP	Under preparation	Przetwarzane	Q Show
4002942	2020-11-24 13:29:07	101.00 zł	Test	Test	ce606cf5f4...	COD/DP	Under preparation	Przetwarzane	Q Show
4002941	2020-11-24 13:28:03	22.00 zł	Test	Test	538c8c2720...	COD/DP	Under preparation	Nowe	Q Show
4002940	2020-11-24 13:27:16	35.00 zł	Test	Test	4e88d982d5...	COD/DP	Under preparation	Przetwarzane	Q Show

Showing 1 to 10 of 229 entries

← Previous 1 2 3 4 5 Next →

Orders / list tab in section Beauty Advisor> Orders / list

- **(1) Show X entries** - option to change the number of BA orders on one page (available range from 10 to 100).
- **(2)** - columns containing information on BA contracts. Each column is sortable:
 - **ID** - the unique identifier of the BA order in the administration panel.
 - **Processed on** - date and time of BA order processing
 - **Value** - Order value.
 - **First name** - Customer's first name.
 - **Last name**- Customer's last name.
 - **Email** - Customer's e-mail address.
 - **Paid?** - Payment status. If the selected delivery was Cash on Delivery it will show COD.
 - **Package status** - Shipment status. Pressing the print label button **(5)** will change this status to “Under preparation”. The BA consultant must manually change the status to “Ready to be sent” in order to bring up a popup **(8)** where he will enter the weight of the package. This action will enable pressing the **Generate CSV file for courier** button and the shipment status will change from “Ready to be sent” to “Sent”.

Package weight:

Pop-up with the option to enter the weight of the package

- **Status** - Current order status.
- **Actions**
 - **(5)** - select the button to generate a label for a given order. The action changes the status to “*Under preparation*” from all other shipment statuses.
 - **Show (6)** - select the button to go to the order details. In the order details view, you can change the shipment status **(8)**, as in the example below.

Order #4002057

General data	
Processed on	2020-05-01 10:12:36
Order value	118.20 zł
Campaign code	3PYJ5WS11
Paid?	COD/DP
Status	
Status	
Package status	Waiting for preparation
Delivery	
Delivery method	Kurier DPD
Doprawné	0.00 zł
Payment	
Payment method	Płatność przy odbiorze
Customer data	
E-mail	c795f477e5e5f864af694150b0e59159c5670eba@onetime.tauceti.pl
ID	420116
Shipment data	
First name	Maciej
Last name	Mbochyński
E-mail	maciej.bochyński@gmail.com
Street	Nowogrodzka
House	68
Flat	
City	Warszawa
Postal code	02-014
Mobile phone	+48605065785

- **(3)** - order search engine (search possible by criteria: **First name, Last name, Email**)
 - **(7)** - navigation through the BA orders list in the administration panel.
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