Vendor Setup Guide

PART 5

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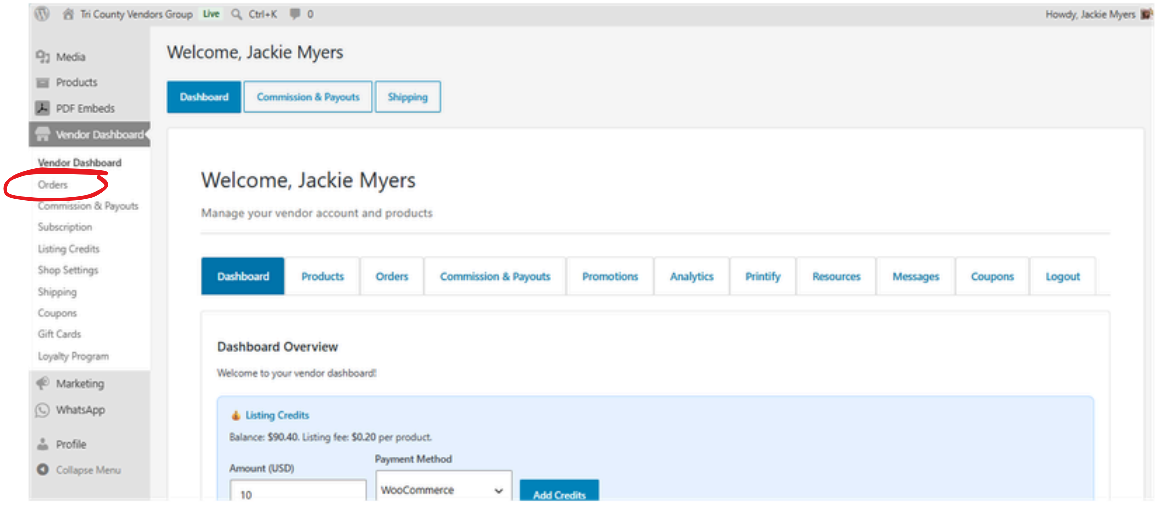
A complete reference for configuring your vendor store — from sign-in to your first sale.

Processing Orders

Part 5 covers everything you need to know about managing your orders through the Vendor Dashboard. From viewing incoming orders to updating statuses and communicating with customers, this guide will walk you through each step of the order process.

Section 1: Accessing Your Orders

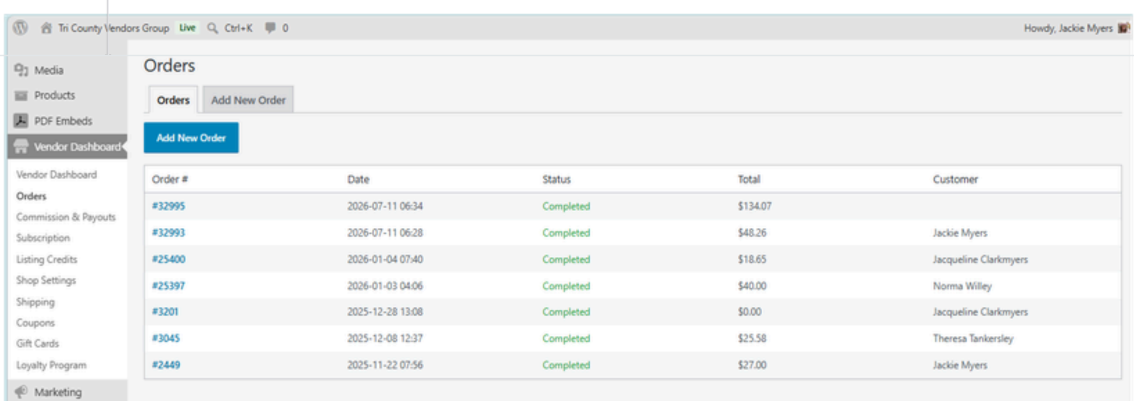
Your Orders section is where you can view and manage all orders placed in your store. To access it, look for **Orders** in the left-hand menu of your Vendor Dashboard and click on it.



Section 2: Understanding the Orders Page

When you click on **Orders**, you will see a list of all orders associated with your store. Each row in the list represents one order and displays the following information:

Field	Description
Order #	The unique order number assigned to each purchase. Click on the order number to open the full order details.
Date	The date and time the order was placed.
Status	The current status of the order. See *Section 4: Understanding Order Statuses* below for a full explanation of each status.
Total	The total dollar amount of the order.
Customer	The name of the customer who placed the order. Some orders may not display a customer name if the customer checked out as a guest.



Note

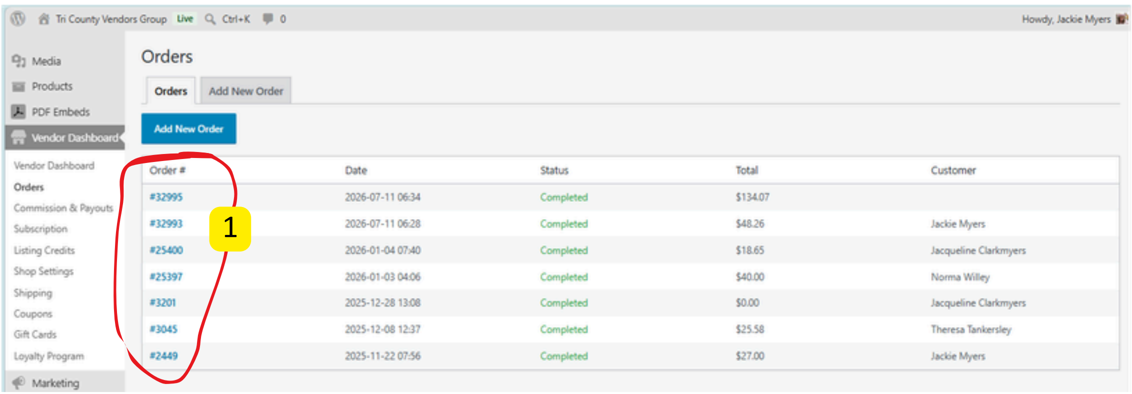
At the top of the Orders page you will also see an **Add New Order** button, which allows you to manually create an order. This is covered in Section 7 of this guide.

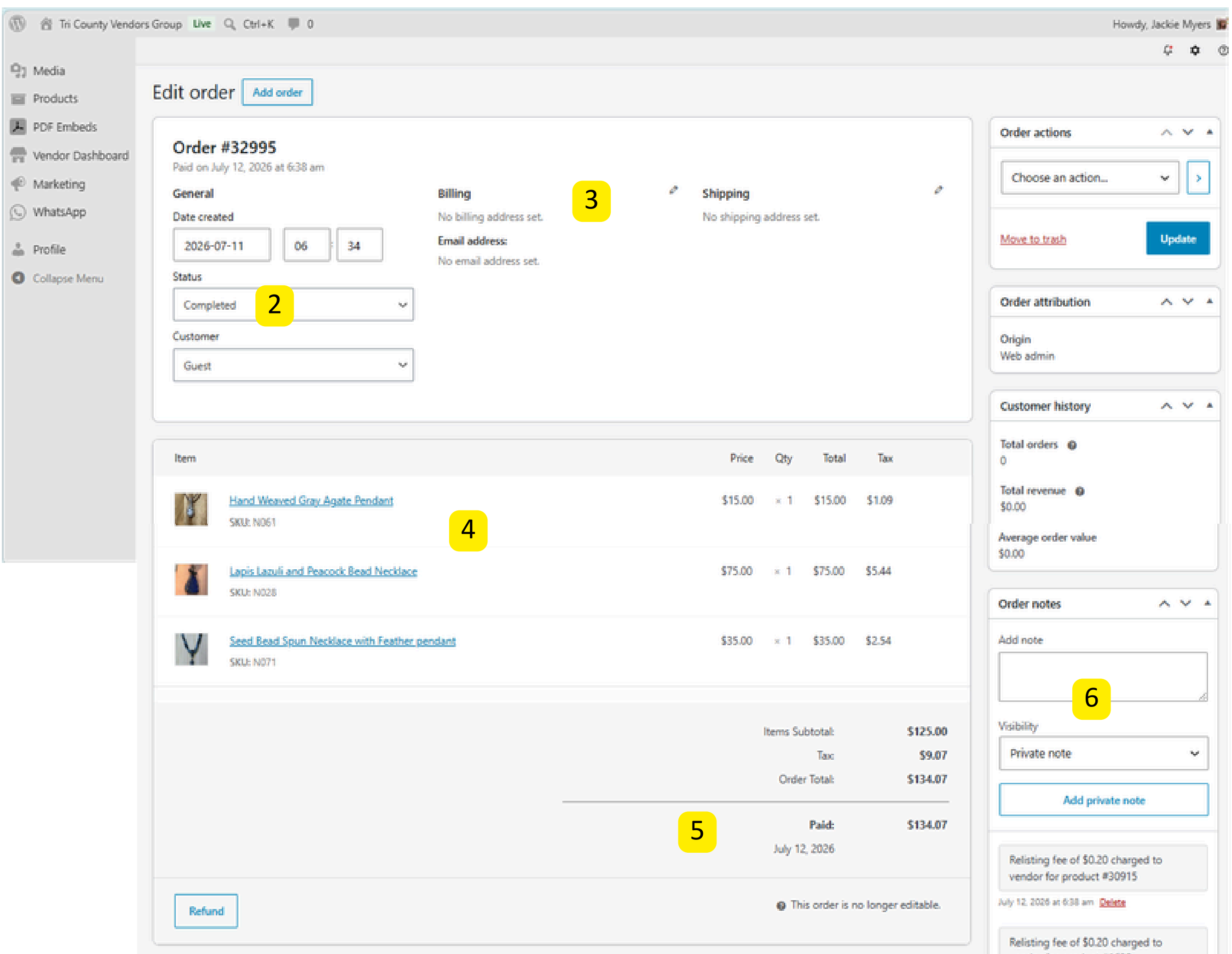
Section 3: How to View an Order

To see the full details of an order, click on the **Order #** in the Orders list. This will open the order detail page, which contains all the information you need to fulfill the order.

On the order detail page you will find:

1. Order number and date
2. Current order status
3. Customer billing and shipping information
4. A list of the items ordered, including product name, quantity, and price
5. Order totals including subtotal, shipping, and total
6. Order Notes — any notes from the customer or from the system





Section 4: Understanding Order Statuses

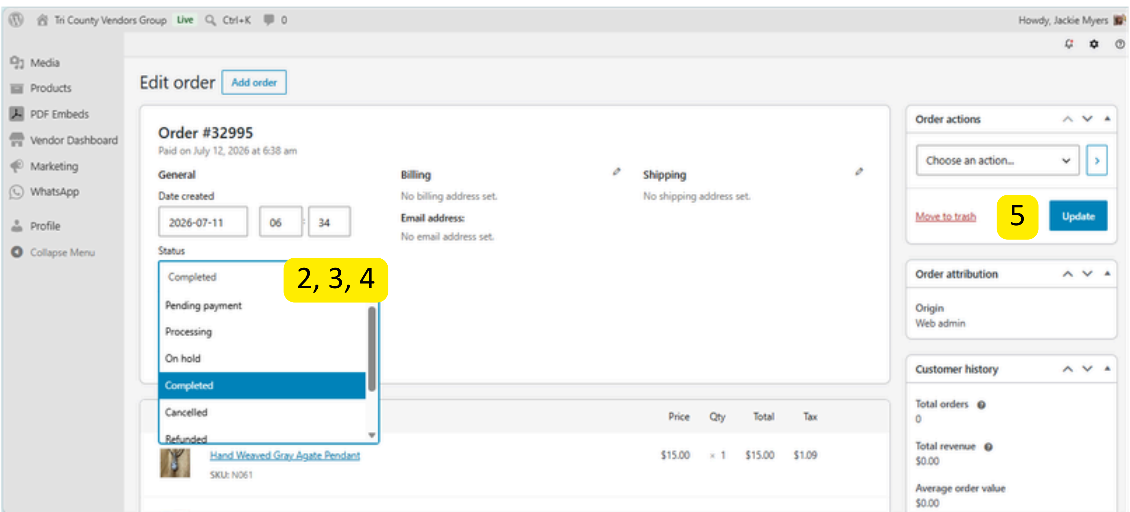
Every order has a status that tells you where it is in the fulfillment process. Below is a breakdown of each status and what it means for you as a vendor:

Status	What It Means & What To Do
Pending Payment	The order has been placed but payment has not yet been received or confirmed. No action is needed from you yet — wait for the status to update before preparing the order.
Processing	Payment has been received and the order is ready for you to prepare and fulfill. This is your signal to start working on the order.
On Hold	The order is paused, usually because payment needs to be verified. Do not fulfill the order until the status changes.
Completed	The order has been fulfilled and delivered. This is the final status for a successfully processed order.
Cancelled	The order was cancelled, either by the customer or by an admin. No fulfillment is needed.
Refunded	A refund was issued for this order. Contact your admin if you have questions about a refunded order.
Failed	The payment attempt failed or was declined. The customer will need to place a new order.

Section 5: How to Update an Order Status

As you work through an order, you will need to update its status to reflect where it is in the fulfillment process. For example, once you have prepared and shipped an order, you should mark it as **Completed**.

1. From the **Orders** list, click on the **Order #** to open the order detail page. (SEE PAGE 4)
2. Locate the **Order Status** section on the page.
3. Click the **status dropdown** and select the appropriate new status.
4. Click **Save Order** or **Update** to save the change.
5. The customer will automatically receive an **email notification** when the status changes, so always make sure the status reflects the true state of the order.

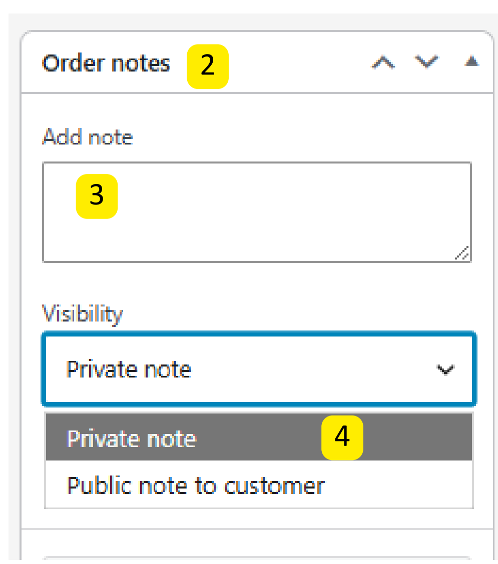


Tip

Always update the order status promptly after fulfilling an order. Keeping statuses current helps customers stay informed and reduces support questions sent to your store.

Section 6: Adding a Note to an Order

Order notes allow you to add internal comments or send a message to the customer about their order. This is useful for communicating shipping updates, letting a customer know their item is being prepared, or leaving internal reminders for yourself.

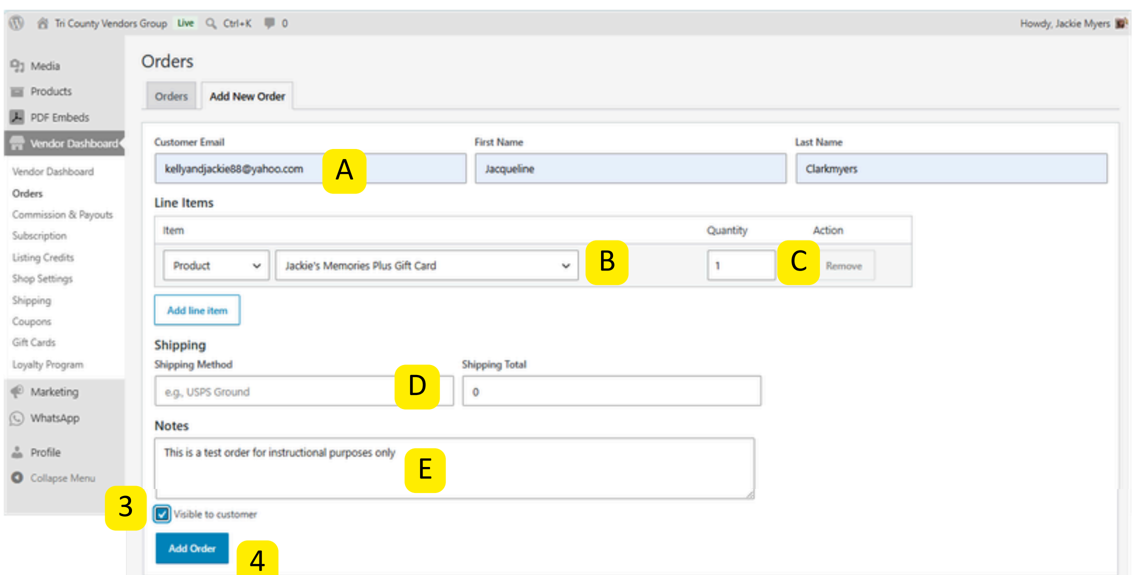


1. Open the order detail page by clicking the **Order #** from the Orders list.
2. Scroll down to the Order Notes section.
3. In the text box, type your note.
4. From the note type dropdown, choose one of the following:
   a. Private Note — Only visible to you and the admin. The customer will not see this note.
   b. Note to Customer — This note will be sent to the customer by email and will be visible in their order history.
5. Once an option is made, click **Add Private Note or Send Note to Customer** to save the note.

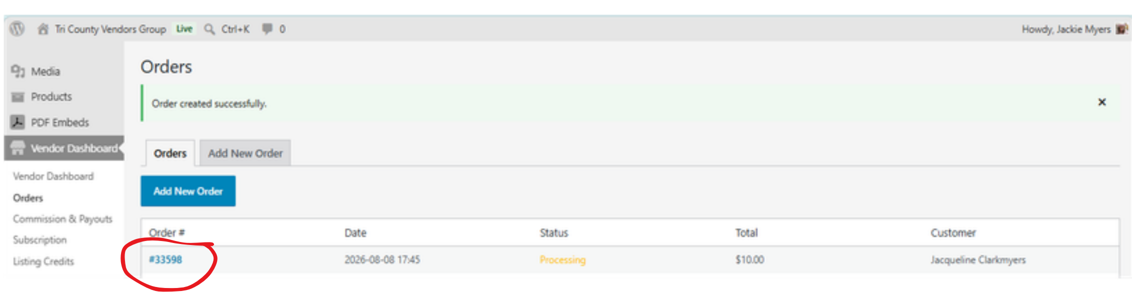
Section 7: How to Create a Manual Order

If a customer places an order in person, over the phone, or through a direct message, you can manually create an order in your dashboard so it is tracked in the system. This is also useful for custom orders or special arrangements made outside of the online store.

1. From the **Orders** page, click the **Add New Order** button at the top of the page.
2. Fill in the following details:
    a. **Customer** — enter the customer information manually.
    b. **Line Items** — Choose item(s) from the dropdown (add more lines if needed).
    c. Add **Quantity**
    d. **Shipping Method and Shipping Total** (if applicable)
    e. **Notes** - Make notes here regarding the order
3. Check the **Visible to customer box** if you want them to see the order.
4. Click **Add Order**



After you click add order, you will be taken to the main orders page. Click on the order number. Complete the processing order instructions to finish you order.



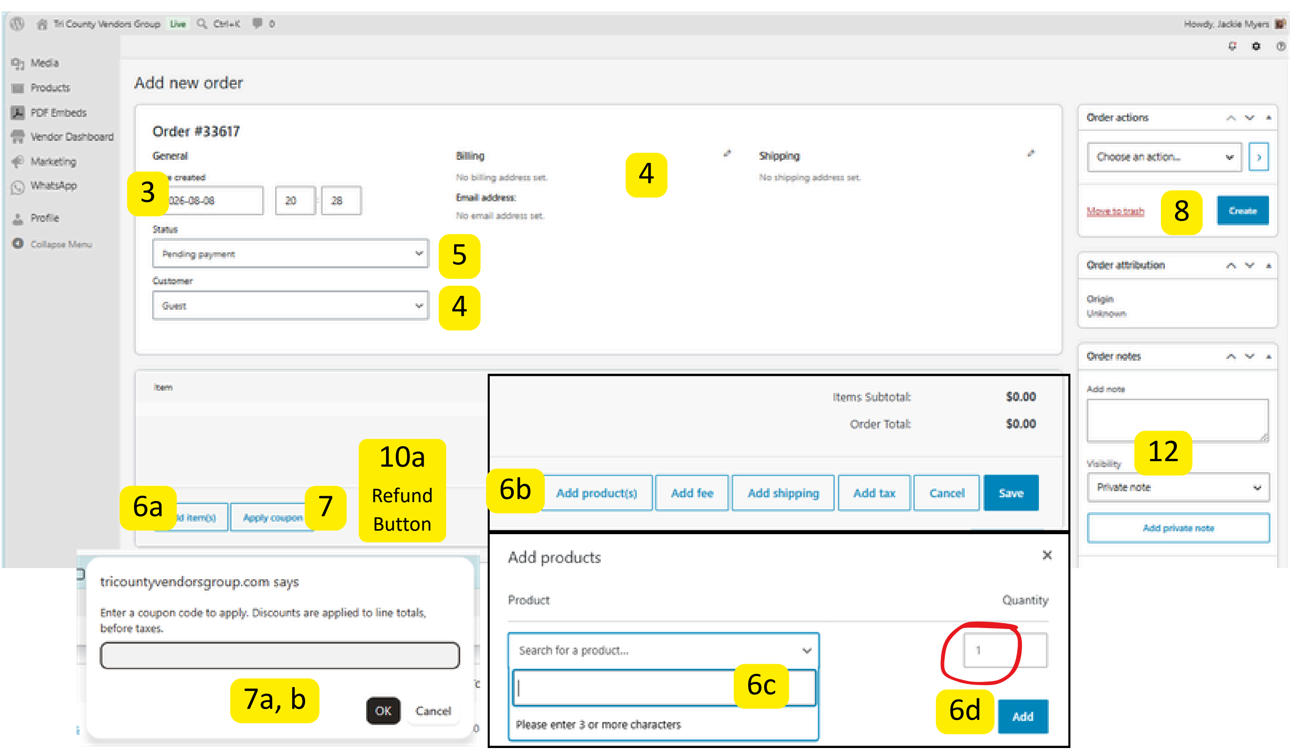
Note

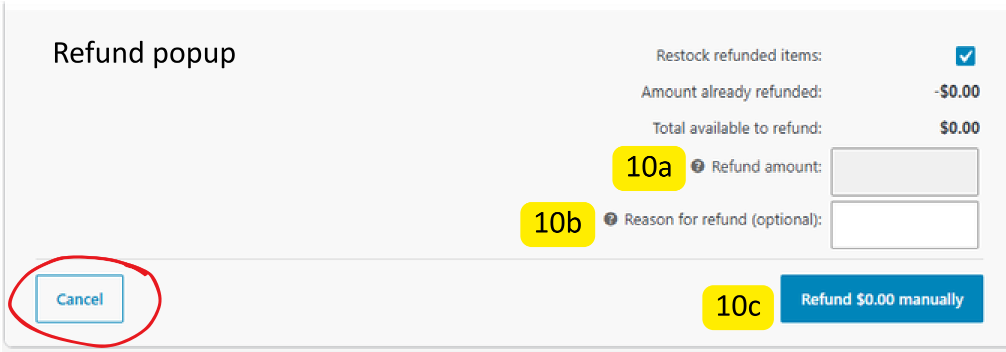
Manual orders allow you to keep your sales records complete even for transactions that happen outside of the online store. Always create a manual order any time a sale takes place outside the platform so your inventory and sales history remain accurate.

Section 7: An alternate method to Create a Manual Order

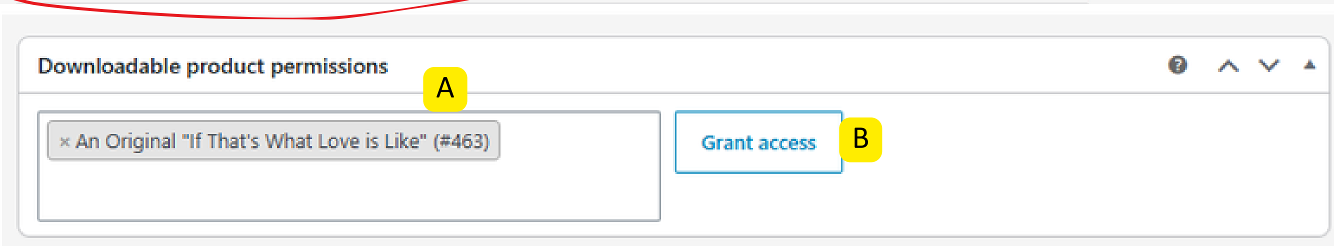
If a customer places an order in person, over the phone, or through a direct message, you can manually create an order in your dashboard so it is tracked in the system. This is also useful for custom orders or special arrangements made outside of the online store.

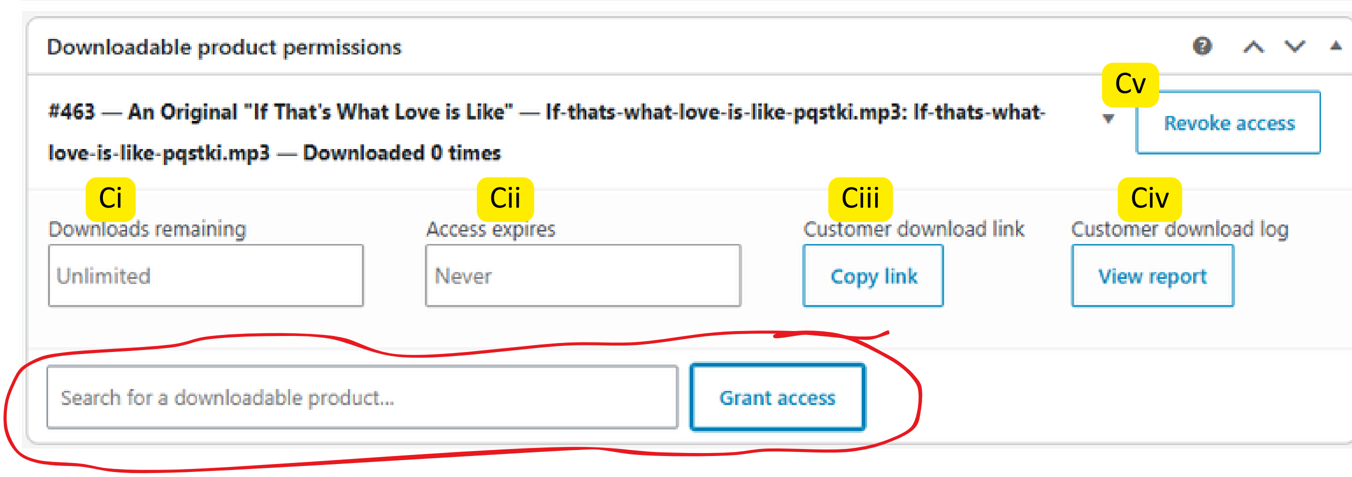
1. From the **Orders** page, click on an exsisting order number.
2. At the top of the page click the **Add Order** button.
3. Verify the order date
4. If you have a customer listed in the dropdown, add them otherwise fill in their information along with shipping information.
5. The order status needs to be filled in
6. The next block has the product:
   a. Click add Item(s)
   b. Click add product(s)
   c. Search the item(s) to add to the cart then the quantity
   d. Click the ADD button
7. To add a coupon to the order:
   a. Click Apply Coupon
   b. type in the coupon code in the popup
   c. Click Ok
8. Create order by clicking the Create button
9. Update Status of the order and Update
10. To apply a Refund (BUTTON WILL BE VISIBLE AFTER THE ORDER IS CREATED)
    a. Click Refund
    b. Type in refund amount (make sure the item listed is correct) see next page
    c. Note reason for refund (optional) see next page
    d. Click Refund $ amount manually see next page
11. Always update the order after making a change
12. Adding notes to the customer or privately can be done manually at any time





13. If the order is a downloadable item, you will need to grant access to the customer
    a. Search the item and click on it when it shows up
    b. grant access
    c. Once access is granted you will be able to do the following:
        i. Update Downloads remaining
        ii. Update Access expires date
        iii. Copy Link (to send to the customer)
        iv. View Customer download log report
        v. Revoke Access





Related Guide:
For questions about payments and commissions on your orders, refer to Part 3 of the Vendor Setup Guide — Step 8: Commission & Payouts.

Disclaimer: *This guide was created with the assistance of AI. While every effort has been made to ensure accuracy, some information may contain errors or may not reflect the most current platform features. If you notice any inaccuracies, please notify your admin so they can be reviewed and corrected promptly. Thank you for helping keep this guide accurate for all vendors.*