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## Sales Manager:

- Order Dashboard
  - Export orders
  - Advanced Search
    - Customer Order View
      - **View all related orders to specific customer**
  - Order View
    - View Order information
      - Status
      - Payment
        - Set payment method (when status is new)
        - Change payment type (when status is pending)
      - Amount
      - Date created
    - View Customer Info
      - Email
        - Edit email
        - Unsubscribe user from email service
      - Name
        - Ban customer
        - Enable fraud monitoring (for any new orders customer puts in)
      - Phone
      - Shipping address
      - Billing address
    - View shipping data
      - Link to shipping ID
      - Shipping Status
      - Tracking Number (if order label is printed)
      - Shipment created date
    - View transaction data
      - Link to transaction ID
      - External ID
      - Payment code
      - Amount
      - Descriptor
      - Status

- Last 4 digits of card
  - Updated date
  - Transaction created by
- View Product data
  - Image
  - Sku
  - Title & Pack quantity
  - Quantity & Price per pack
  - Subtotal
  - Shipping & Handling
  - Grand Total
- Events View
  - Dates of specific order events
  - Type of integration updates
    - Shop
    - Payment Method Updates
    - Linnworks Updates
    - Order Status (done=paid, shipped, delivered)
  - Status of each integration update (successful/unsuccessful/error)
- Allowed Actions by Paymonix User:
  - Resend Email Notifications (*when order is in any status, but keep in mind data will not populate if order has not reached specific stage*)
    - Abandoned cart
    - Payment instructions
    - Payment failed
    - Order paid
    - Order canceled
  - Cancel Order (when order is new or pending)
  - Apply Payment & Fail Payment (when order is pending)
    - **You should not apply payment or fail payment when payment is processing**
- Classify as Chargeback (when status is paid)
- Fraud Check (when status is new and pending)

- Transaction View

*(when clicking on specific order transaction link)*

- Refund Transaction (if specific payment method is set up for auto refund)
- View transaction type
- View transaction details
- View refund details if applicable
- **Shipping Dashboard View**
  - **Available for view once order is Paid**
    - View all shipments
      - Group shipment actions
        - Select specific shipments
        - hold/unhold shipments
        - Assign to folder/delete from folder
    - Shipment Order Info
      - Shipment Order ID
      - Shipment Status
      - Shipment Sync date
      - Shipment Tracking Company & ID
      - Push to aftership (pushes shipping data to aftership)
      - assign/replace folder (only valid when status is OPEN only)
      - Billing Address
      - Shipping Address
        - Edit Shipping Address
    - Products
      - Sku
      - Title
      - Stock status
      - Quantity
      - Weight
      - Unit cost
      - Discount
      - Tax rate
      - Line cost
        - Edit Products
    - Notes
      - Add notes for the warehouse
    - Other Actions in Shipment Page:
      - Delete shipment (can only be used for OPEN shipment status only, if label and invoice printed you will need to update warehouse)
      - Hold shipment (can only be used for OPEN shipment status only, if label and invoice printed you will need to update warehouse)
      - Cancel Shipment (can only be used for OPEN shipment status only, if label and invoice printed you will need to update warehouse)

- Sync Shipment (syncs with aftership and updates tracking info, shipped & delivered status if it wasn't already automatically updated)
- Resend shipped email
- Create a resend of shipment (once order is processed)

- **Fraud Review**

- View all orders in Fraud Review
- View fraud scores & info
- Choose to:
  - Blacklist & Cancel
  - Reject & failed
  - Reject & cancel
  - Approve & failed
  - Approve & Process

- **Offline Payments View**

- Search offline payments
- Enter offline payments
- View payment emails
- View offline payment reports

- **Banned Customers View**

- View all customers that are banned
- Click on specific banned customer
- View:
  - ID
  - Order ID
  - Ban initiated by
  - Customer email banned
  - Shipping address
  - IP associated
  - Internal notes
  - Ban creation date
  - Type of ban
  - Banned payment
  - Banned until
- Unban customer

## Finance Manager *All Sales Manager Capabilities+*:

- Graphs of Data:

(*"Home" on Order View*)

- Orders

- Total paid orders (paid, shipped, delivered)
- Total orders (paid, shipped, delivered, processing, pay review)
- Paid Orders count (paid, shipped, delivered)
- Orders count (paid, shipped, delivered, processing, pay review)
- Payments based on country
- Failed Transactions

- Shipments

- Shipping & Handling cost
- Products total cost
- Total cost of products & shipping
- Shipments based on Countries
- Shipments based on states

- Resends

- Resend count (open, processed)
- Products count
- Total USD
- Resends/day
- Resends/country
- Resends/state
- Reasons for resend

- Discounts

- Orders total
- Discount totals
- Orders count
- Discount amount per day
- Discount count per day
- Coupons used & their \$ amounts

- Products

- Quantity of products sold per day
- Best selling products by quantity
- Best selling products by revenue

- Customers

- New customers per day
- Top coupon users
- Top customers based on revenue

- Payments

- ACH return codes
- Order Dashboard
  - View linked data in the events which display detailed information of each event

## Admins *All Finance Manager capabilities+:*

- Order Dashboard
  - Create a manual order
  - Events:
    - View fraudlabs response data
    - Email Data
    - Aftership data
    - Engine data
    - Who/what an event was triggered by
- Settings Dashboard
  - Payments
    - Create new payment type
    - Enable/disable payment methods
    - Update API keys
    - Modify Payment details
      - Currency
      - Title shown at checkout
      - Allowed/Disallowed Countries, Cities, Zip Codes
      - Set payment descriptions and success description
      - Set descriptor
      - Set Payment charge percentage
      - Enable lucky dip
      - Add or Remove gifts (incentives per payment method)
      - Set abandoned email points
      - Set min and max order amounts
      - Enable payment rotation
      - Add payment info (like a zelle or cashapp handle)
      - Enable alert notifications
      - Set payment visibility time
      - Delete payment method
      - Save payment method
  - Users
    - Create new users
    - Modify existing users & access levels



- Exchange Rates
  - Set currency rates from currency to currency and rate
  - Sync currency rates with source
- Store Settings
  - General
    - Gate title
    - Guest redirect URL
    - Enable locking order after failed payment
    - Set email Settings
      - Type
      - Public & Private Key
    - Enable Zero amount orders as paid
    - Lock cardholder name
    - Abandoned cart email delays hourly set
      - Cancel on last point
      - Enable coupon for abandoned cart
      - Send abandoned cart emails on weekends
    - Failed orders email
      - Cancel on last point
      - Send failed order emails on weekends
    - Fraud Labs integration
    - Zendesk Integration
    - Aftership Integration
    - Google analytics integration
    - Swell integration
    - Post affiliate pro integration
    - Affiliatly integration
- System Dashboard
  - View a record of all admin changes by general, payment, and user