USER GUIDE · VERSION 1

E-commerce

Your online shop and the console behind it: take orders, pack and send them, handle returns and refunds, keep online stock honest, run promotions and look after the product catalogue.

1. What it is for
2. Sign in and find your way
3. Pack and send an order
4. Handle a return or a refund
5. Look up a customer
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7. Keep online stock right
8. Read the reports
9. Run a promotion
10. Change products and categories
11. Edit the shop's pages
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What it is for

For: Everyone

E-commerce is your company's online shop and the console your staff run it from. Customers browse, pay and choose delivery or collection at an outlet. Staff use the console to pack and send orders, handle returns and refunds, keep the stock that is sold online correct, run promotions, and look after products, categories and the shop's own pages.

Who uses it

Each person gets one or more roles. The console only shows what your role allows.

Role	What they do
Order Ops	Pack and send orders, answer quotation requests.
Customer Service	Orders, returns, and preparing refunds.
Finance	Approve refunds and pay them out, read the sales and payment reports.
Inventory Controller	Count stock and correct it.
Merchandiser	Products, prices and categories.
Marketing	Promotions and the shop's pages.
Administrator	Settings, staff access, and most of the above.

Some pairs are kept apart on purpose. An Administrator, Merchandiser or Marketing person can never correct stock, and Finance can never create a promotion. Nobody can approve a refund they prepared.

What it needs from other systems

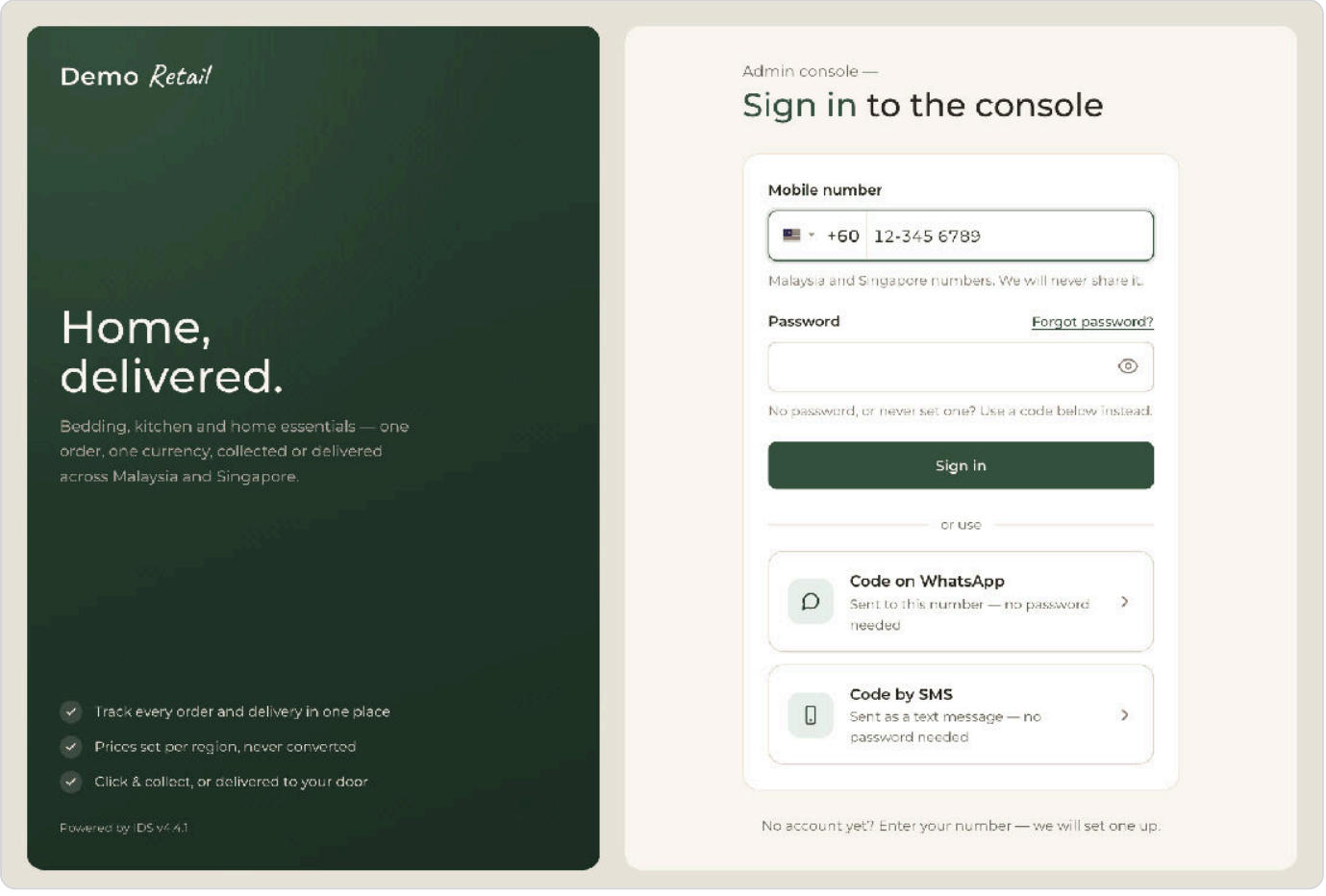
- Staff and customers sign in with your company's shared sign-in account (IDS). The console does not create or edit those accounts.
- Card, FPX and DuitNow payments go through the payment provider; courier bookings go through EasyParcel when live courier rates are switched on.
- Stock counts from outlets and the warehouse feed the stock figures.

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Sign in and find your way

For: Everyone

1. Open the console's address, which ends in **/admin**. If you are not signed in, the sign-in page opens.
2. Under **Mobile number**, check the country code shows **+60** (Malaysia) or **+65** (Singapore), then type your number.
3. Type your **Password** and press **Sign in**. No password? Press **Code on WhatsApp** or **Code by SMS** and type the code you receive.



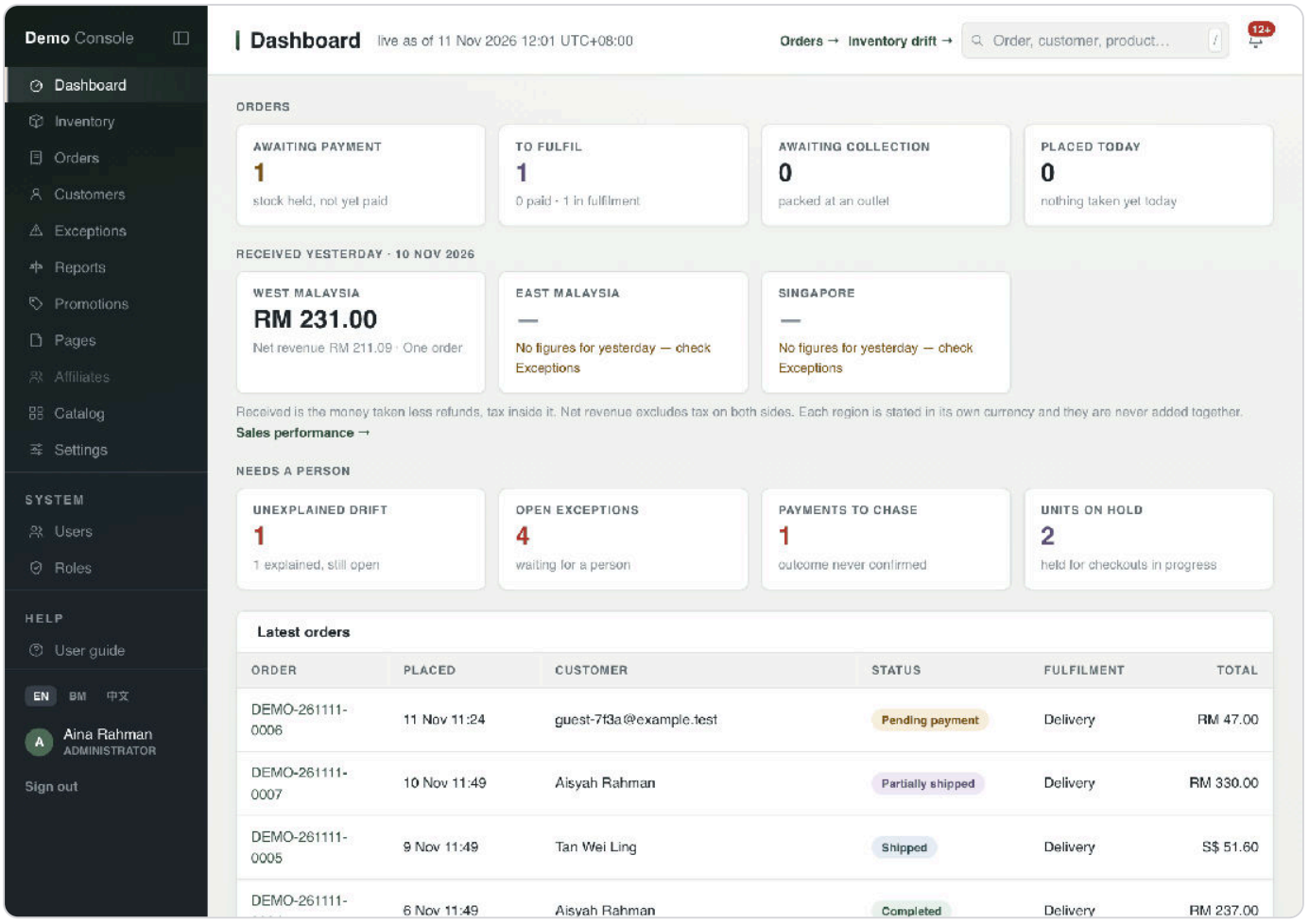
Signing in does not give you access by itself. If you see a message saying your account has no admin console access, ask an administrator to give you a role.

The menu and the dashboard

The dark menu on the left is the same on every screen: **Dashboard**, **Inventory**, **Orders**, **Customers**, **Exceptions**, **Reports**, **Promotions**, **Pages**, **Catalog** and **Settings**. **Affiliates** is greyed out because it is not built yet. **Users** and **Roles** appear only for administrators.

The **Dashboard** opens first. Each box links to the screen where that work is done:

- **Orders**: awaiting payment, to fulfil, awaiting collection, placed today.
- **Received yesterday**: money taken yesterday per region, less refunds. If a box says **No figures for yesterday**, the overnight figures did not run; check **Exceptions**.
- **Needs a person**: stock differences nobody has explained, open exceptions, payments with no confirmed result, and units held for customers who are paying right now.
- **Latest orders**: the newest orders, with a link to all of them.



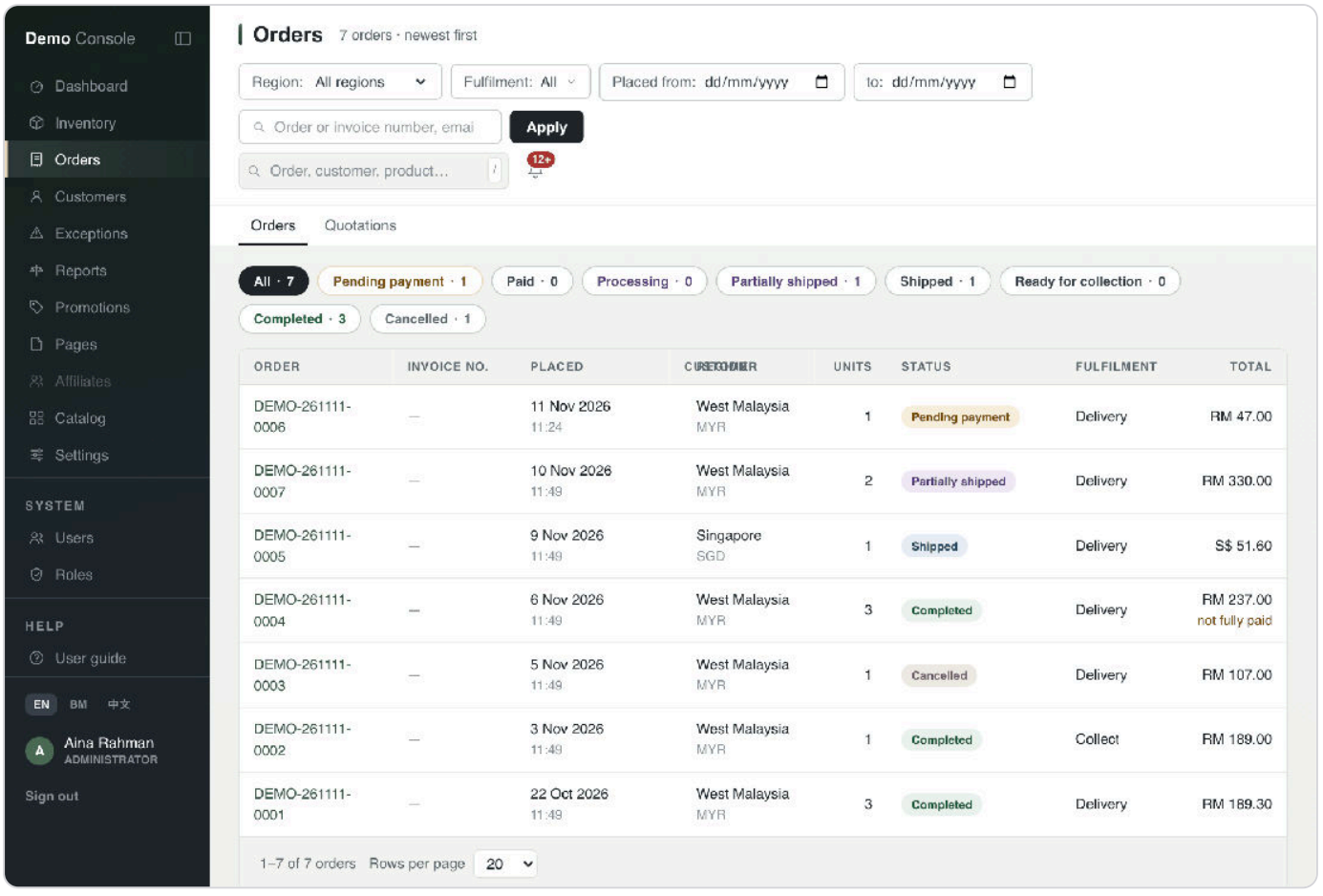
Your name at the bottom of the menu opens **Your account**, where you change your display name, email address, password and language. **EN**, **BM** and **中文** switch the console's language.

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Pack and send an order

For: Order Ops, Customer Service

1. Open **Orders** in the menu. The pills at the top count orders in each status: **Pending payment**, **Paid**, **Processing**, **Partially shipped**, **Shipped**, **Ready for collection**, **Completed** and **Cancelled**.
2. To narrow the list, pick a **Region**, a **Fulfilment** type or dates, or type the start of an order number, invoice number, email address or phone number, then press **Apply**. Searching by customer name does not work.
3. Click an order number to open it.

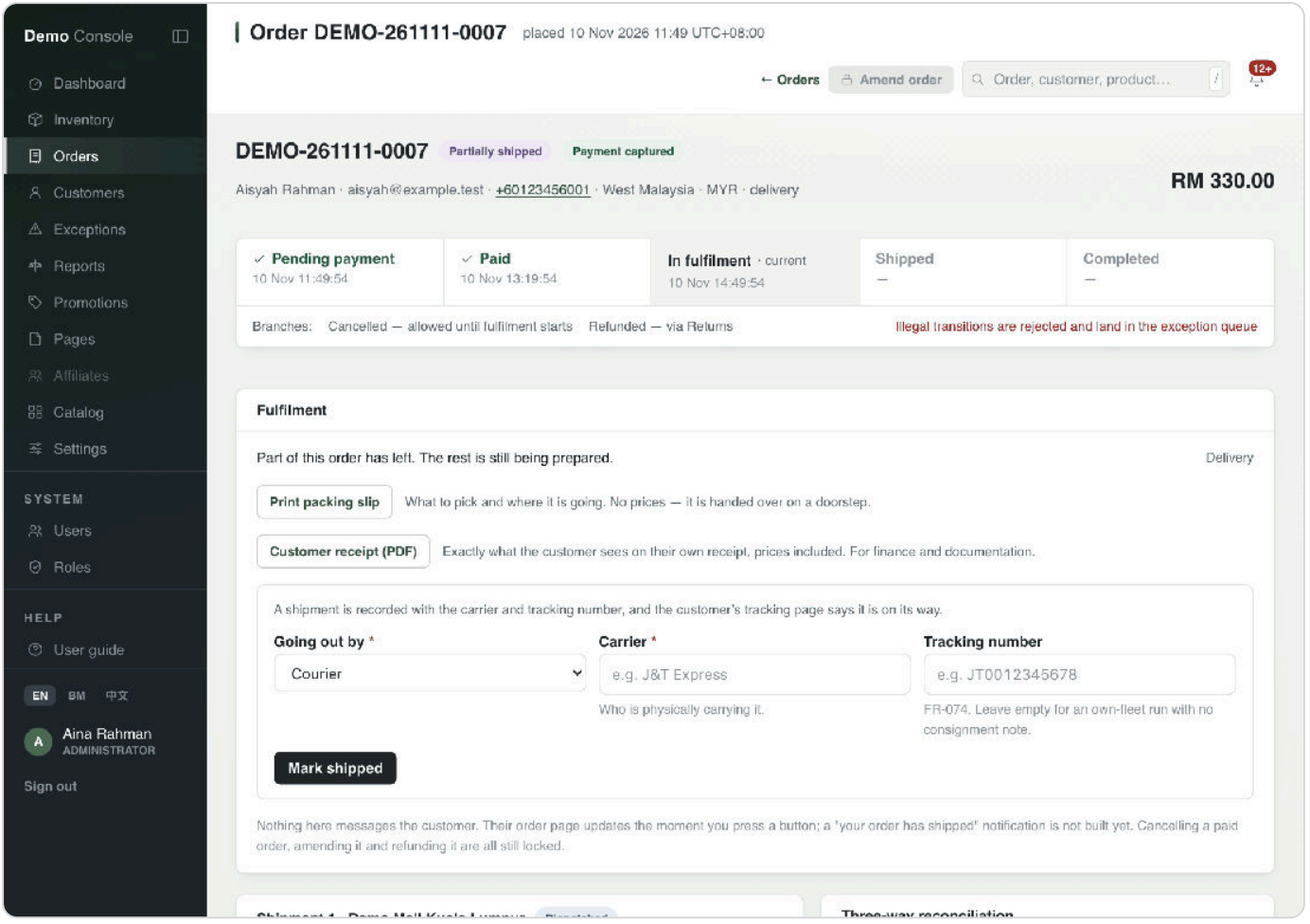


The bar across the top of an order shows where it is: **Pending payment**, **Paid**, **In fulfilment**, **Shipped**, **Completed**.

Send it

1. You do not press anything to move an order out of **Pending payment**. Packing starts by itself once the payment comes through.

2. Press **Print packing slip** for the picker. It lists what to pick and where it goes, with no prices.
3. Press **Start preparing** once the items are being picked.
4. For a delivery, choose **Going out by** (**Courier** or **Own fleet**), type the **Carrier** and the **Tracking number**, then press **Mark shipped**. Leave the tracking number empty for an own-fleet run with no consignment note.
5. For click-and-collect, press **Mark ready for collection** instead. When the customer picks it up, fill in **Who collected it** and press **Mark collected**.
6. When a delivery arrives, press **Mark delivered**. The order is then **Completed**, and anything after that is a return.



An order sent from two places shows one shipment per place, each with its own status.

Good to know

- Nothing on this page messages the customer. Their own order page updates the moment you press a button, but a "your order has shipped" message is not built yet.

- **Amend order** is locked: changing what is on a placed order is not built yet. Cancelling a paid order is also locked.
- **Customer receipt (PDF)** is the same receipt the customer sees, with prices.

Quotation requests

The **Quotations** tab next to **Orders** lists customers who asked for a price from a product page. Reply to the customer yourself, then mark the request answered. Marking it answered sends nothing.

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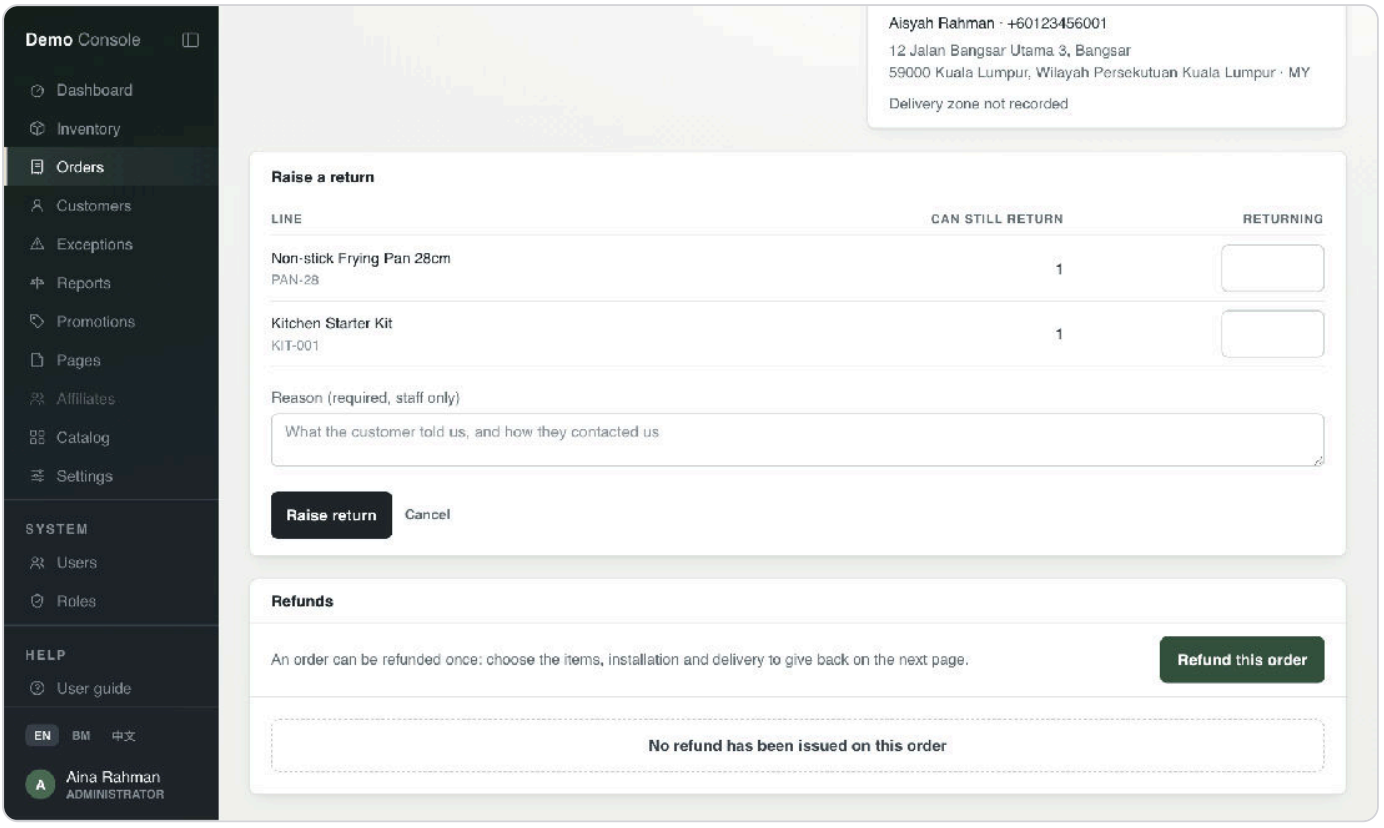
Handle a return or a refund

For: Customer Service, Finance

Raise a return

When a customer wants to send something back:

1. Open the order and scroll down to the return section. Press **Raise a return**.
2. Under **Returning**, type how many of each item is coming back. **Can still return** shows the most you can enter.
3. In **Reason (required, staff only)**, write what the customer told you and how they contacted you.
4. Press **Raise return**.



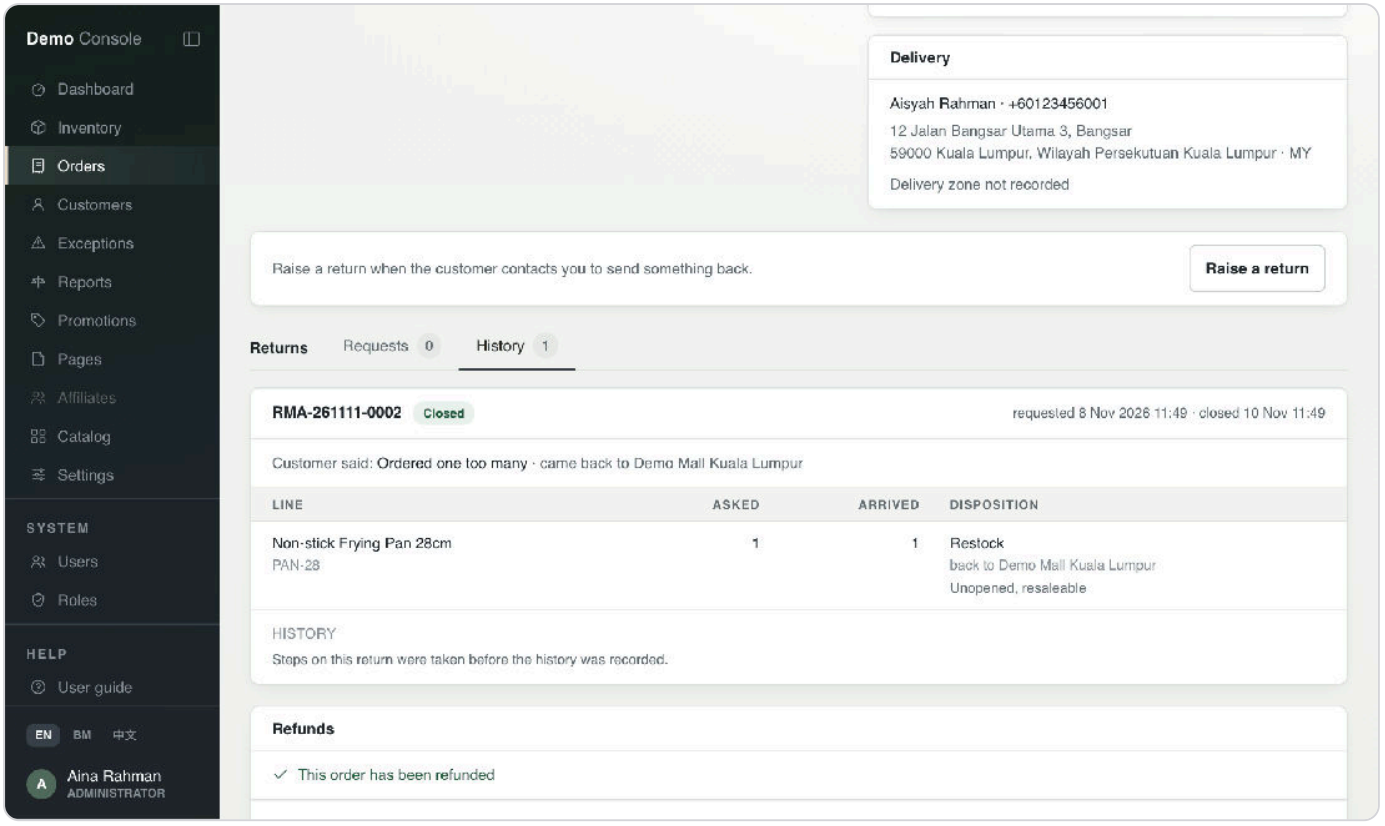
Move the return along

The return appears under **Returns** on the order. Each step has its own button:

1. **Approve** or **Reject** the request.
2. When the parcel arrives, choose the outlet or warehouse it arrived at and press **Mark received**.

3. Record what condition each item is in and where it goes (back on the shelf, or nowhere), then press **Record inspection**.
4. Press **Refund this return** to prepare the refund, or **Close return** if no money goes back.

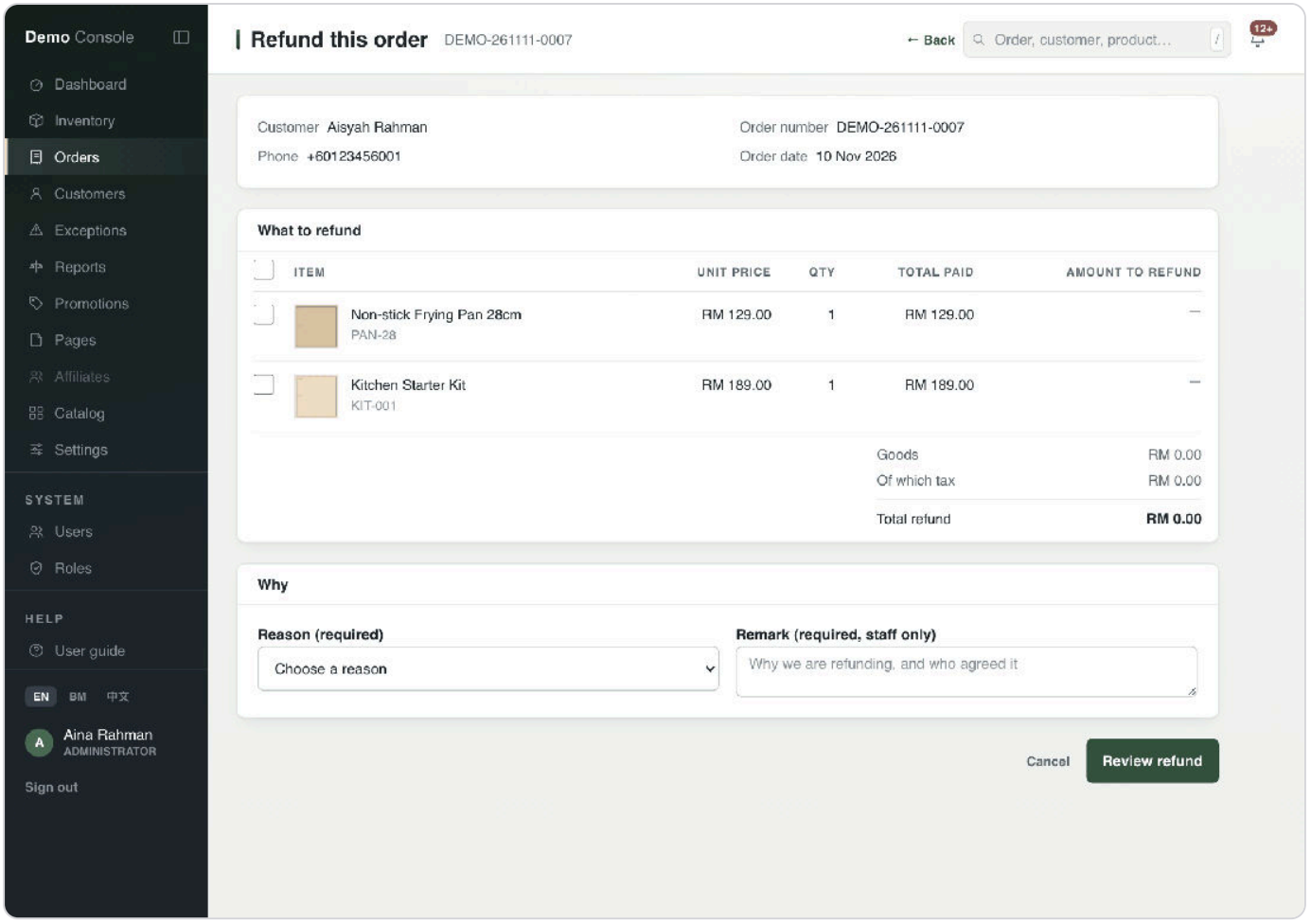
A closed return moves to the **History** tab, with what was asked for, what arrived and what happened to it.



Refund an order

An order can be refunded once. Use this for a cancellation, a price adjustment, goodwill or a delivery that failed.

1. On the order, press **Refund this order**.
2. Tick the items to refund. The total updates as you tick.
3. Choose a **Reason (required)** and write a **Remark (required, staff only)**: why you are refunding and who agreed to it.
4. Press **Review refund**, check the figures, then press **Submit for approval**.



Who approves and pays

A prepared refund pays nothing yet.

1. **Finance** opens the order and presses **Review and approve**, then **Approve refund** (or **Reject refund**). The refund then shows **Approved, payout not sent**.
2. Someone allowed to send payouts (Customer Service, Finance or an Administrator) presses **Send payout**. This pays through the payment provider or records a bank transfer made by hand.

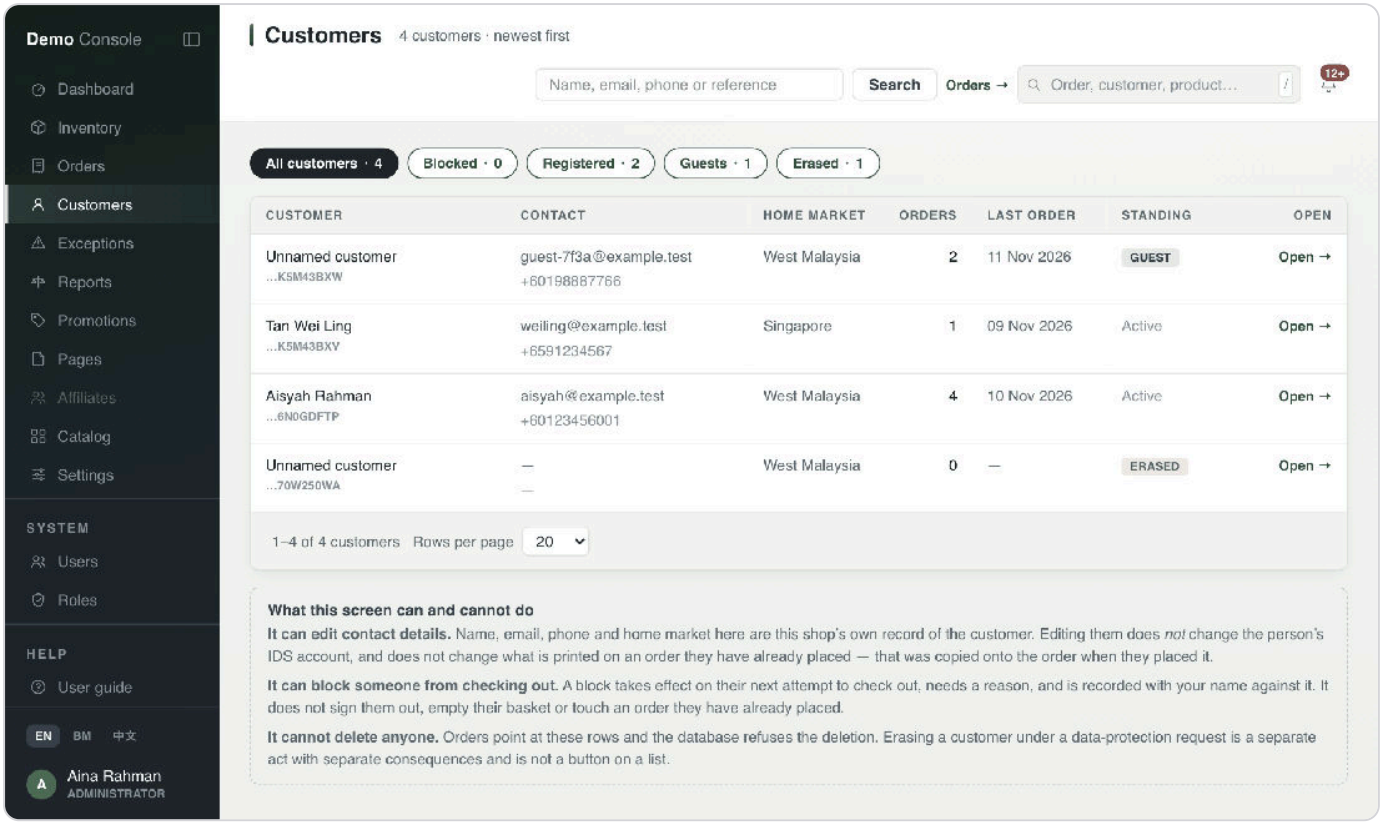
Nobody can approve a refund they prepared themselves.

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Look up a customer

For: Customer Service, Order Ops

1. Open **Customers** in the menu.
2. Type a name, email address, phone number or customer reference and press **Search**. The pills split **Registered** accounts, **Guests** (bought without an account), **Blocked** and **Erased** customers.
3. Press **Open →** on a row.



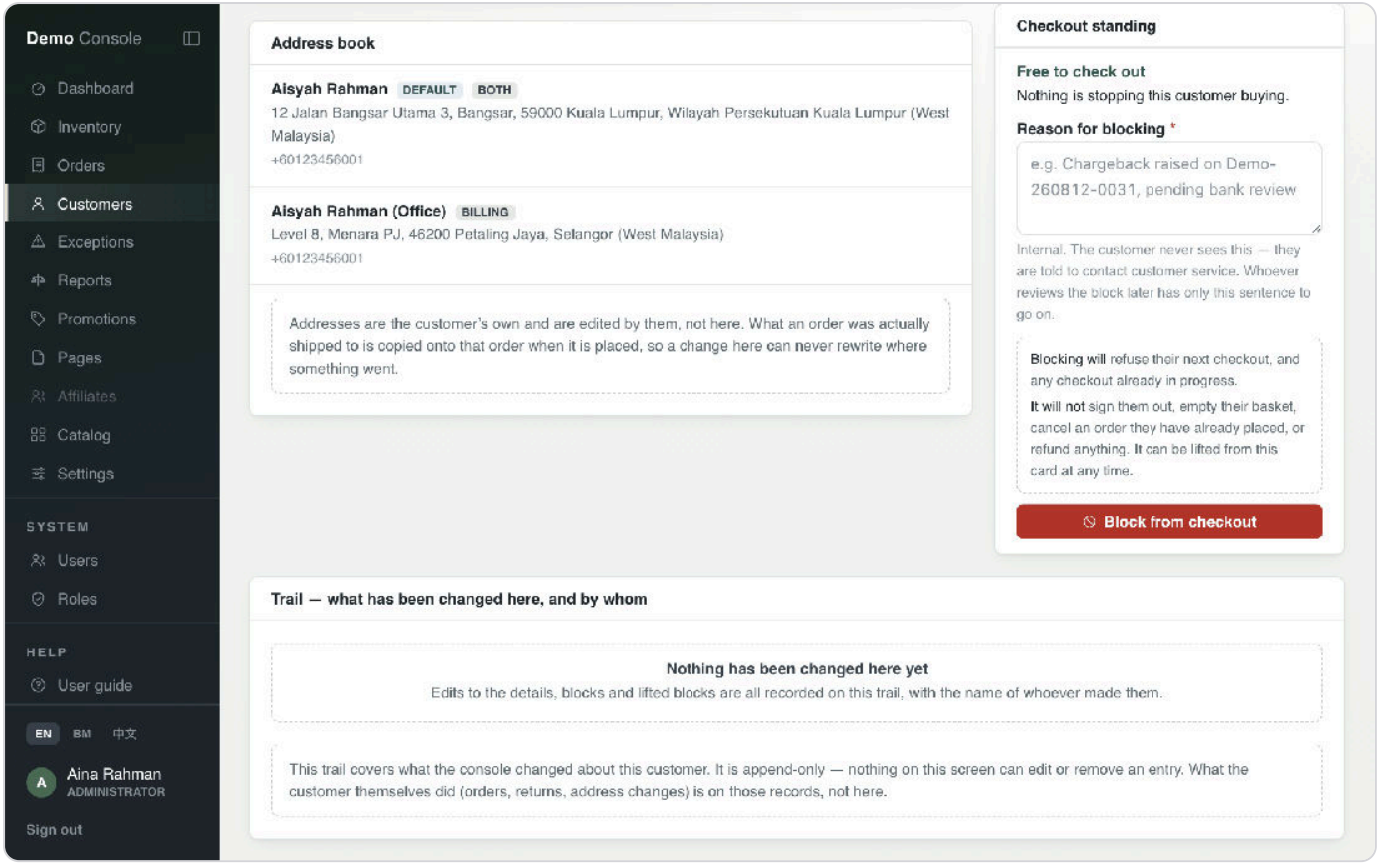
The customer page shows how much they have spent, their recent orders, their saved addresses and how to reach them.

- **Edit details** changes the name, email, phone and home market in this shop's records only. It does not change their sign-in account or any order already placed.
- Addresses are the customer's own. They change them from their account page or at checkout, not here.

Stop someone from checking out

1. On the customer page, find **Checkout standing**.

2. Type a **Reason for blocking**. The customer never sees it; they are told to contact customer service.
3. Press **Block from checkout**.



A block refuses their next checkout and any checkout already in progress. It does not sign them out, empty their basket, cancel an order or refund anything. You can lift it from the same card. Every edit, block and lifted block is written to the **Trail** with the name of whoever did it, and nobody can change the trail.

Customers cannot be deleted from this screen.

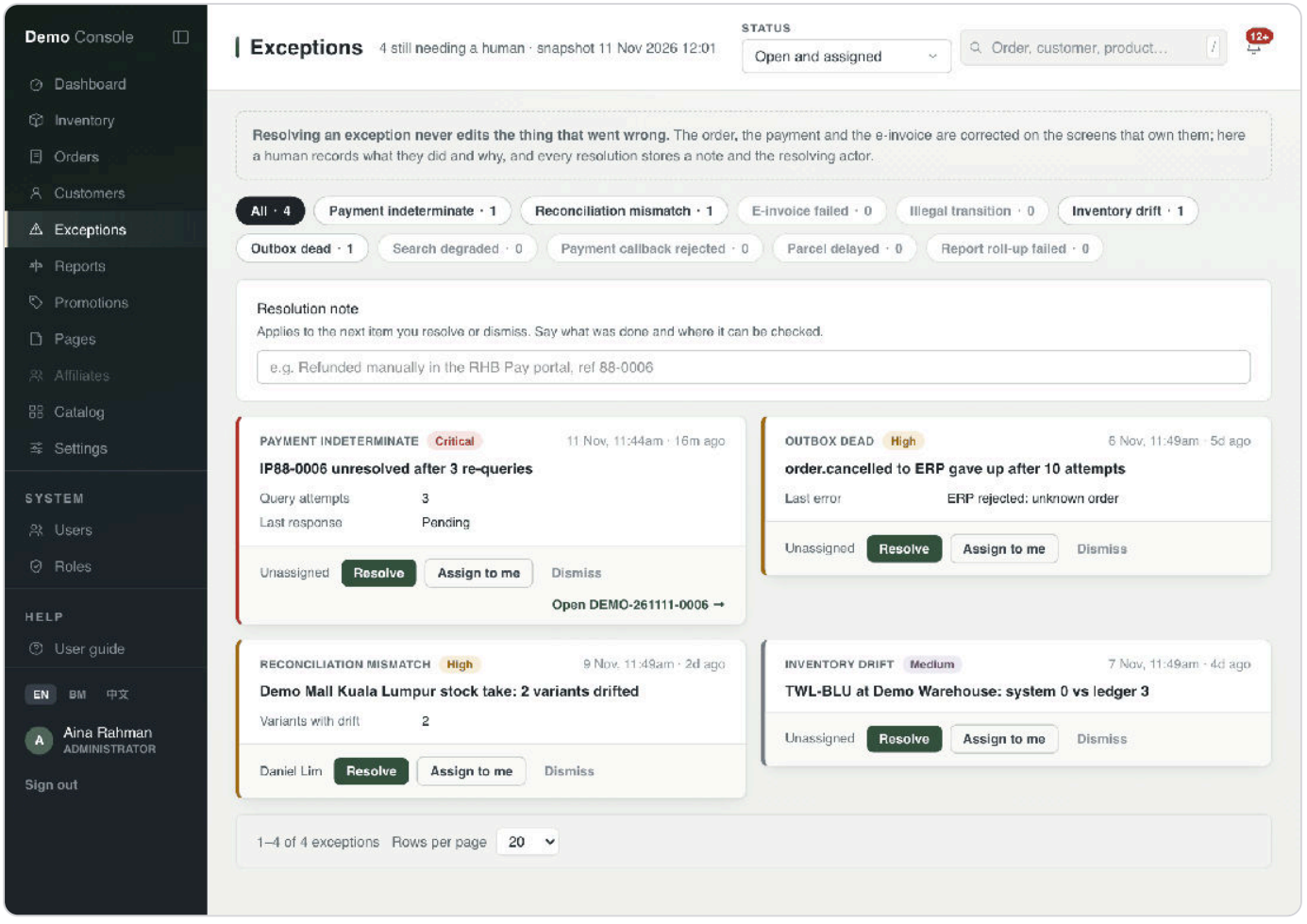
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Clear the exceptions list

For: Everyone

Exceptions lists the things the system could not settle by itself, for example a payment with no confirmed result, a payment that does not match the order, an e-invoice that failed, a stock difference, or a message to another system that kept failing. The red number on **Exceptions** in the menu is how many are waiting.

1. Open **Exceptions** in the menu. Each card names the problem, how serious it is, and the last thing the system tried.
2. Press **Assign to me** so colleagues can see you are on it.
3. Fix the actual problem on its own screen: the order, the payment, the stock. Resolving an exception never changes the order or payment itself.
4. Type a **Resolution note**: what you did and where someone can check it.
5. Press **Resolve**. Use **Dismiss** only when nothing needed doing.



The resolution note applies to the next card you resolve or dismiss, so type it right before you press the button.

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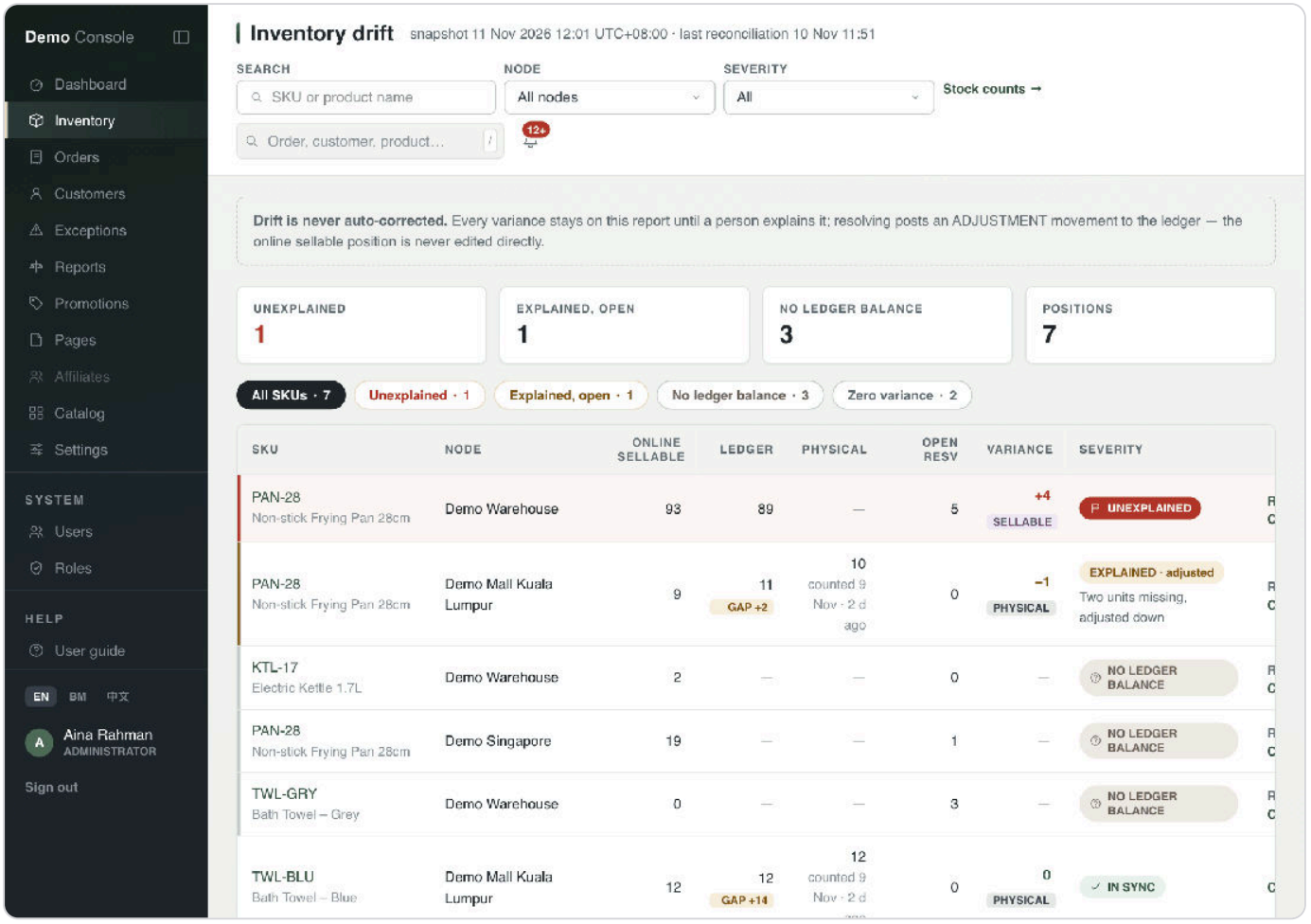
Keep online stock right

For: Inventory Controller

The shop never corrects stock by itself. When the stock records and a count disagree, the difference stays on a list until a person explains it.

See the differences

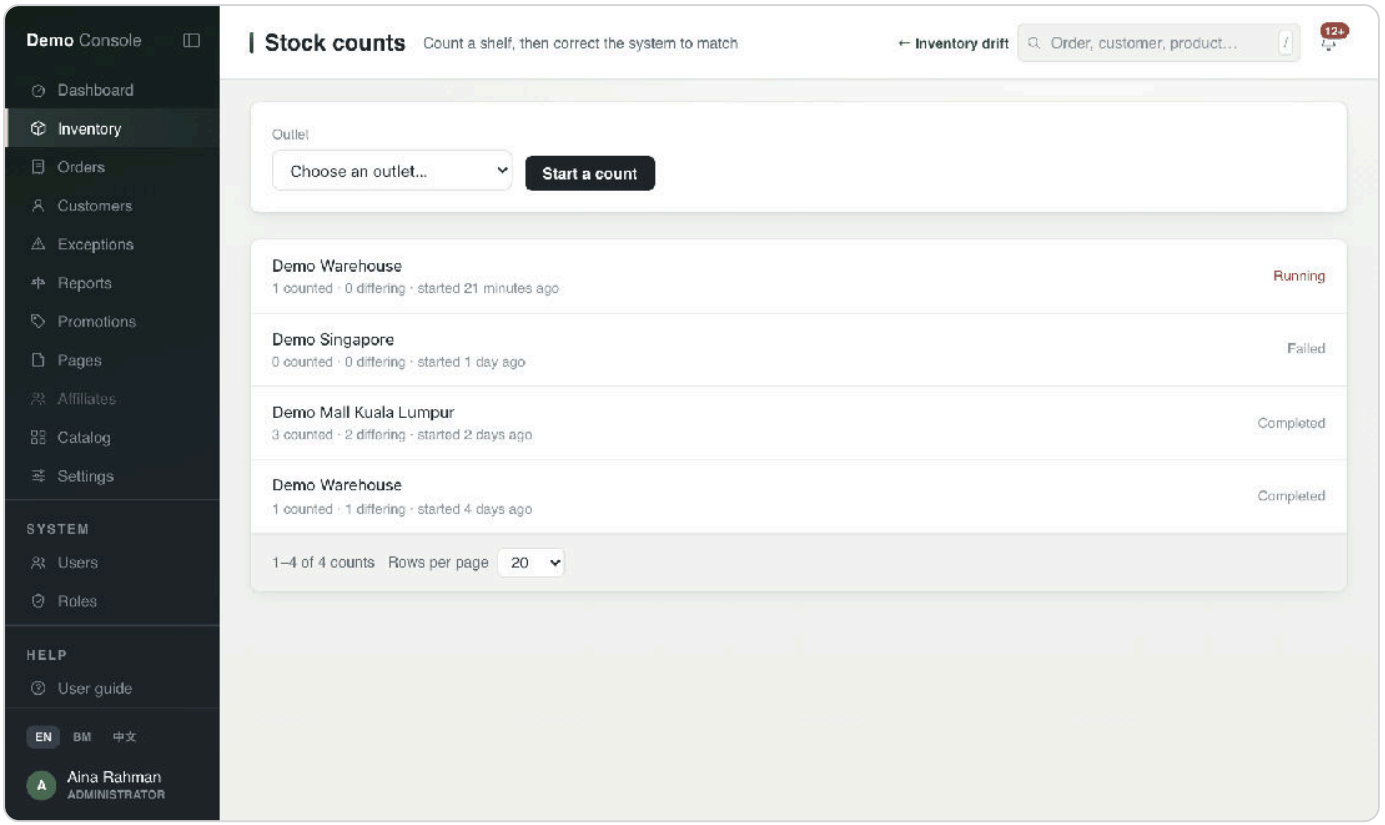
1. Open **Inventory** in the menu. The page is called **Inventory drift**.
2. The boxes at the top count **Unexplained** differences, ones **Explained, open**, and items with **No ledger balance** (no stock record to compare against, which is not the same as no difference).
3. Each row shows a product at one outlet or warehouse: **Online sellable** (what the shop may sell now), **Ledger** (the stock record), **Physical** (the last count), and the **Variance** between them.
4. Press **Resolve** on a row and type why the numbers differ. This writes a correction to the stock record. Press **Count this** to count that product instead.



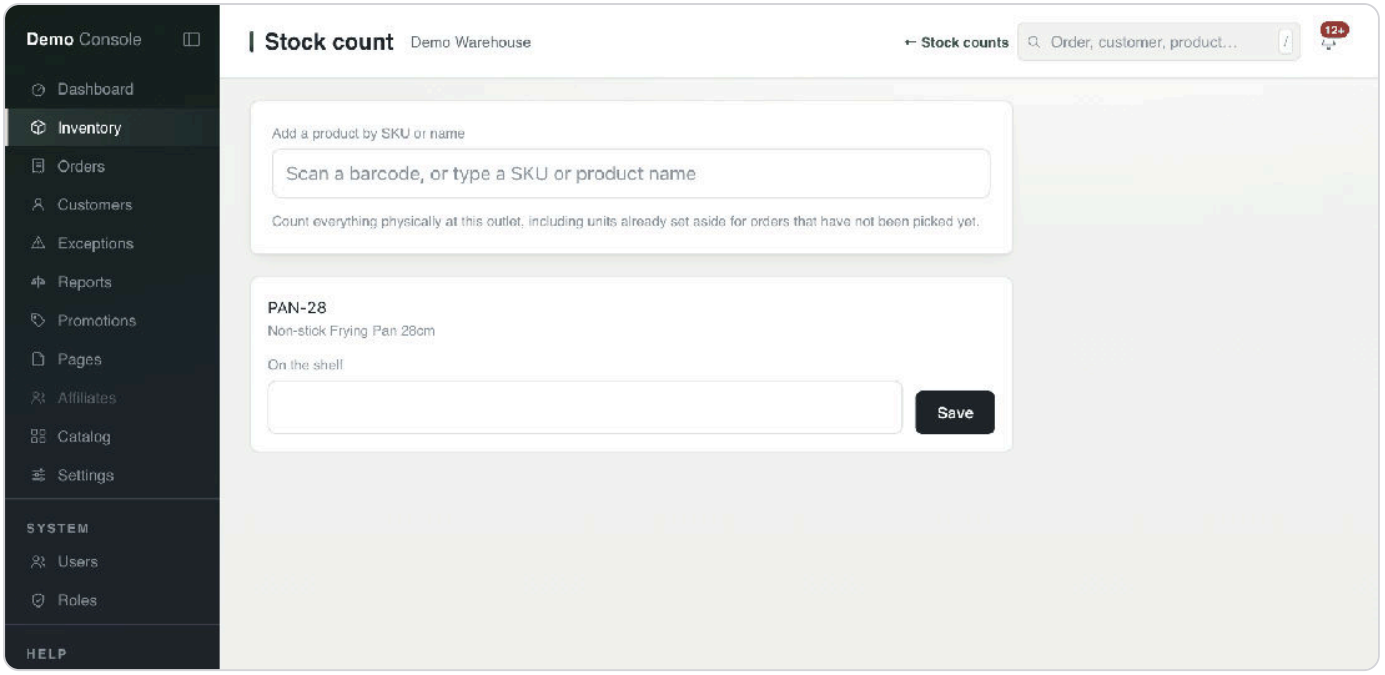
Only an **Inventory Controller** can resolve a difference. Administrators, Merchandisers and Marketing are never allowed to, even though they can see the list.

Count stock

1. On **Inventory drift**, press **Stock counts →**.
2. Choose the **Outlet** and press **Start a count**. Past counts are listed below with how many products were counted and how many differed.



3. Scan a barcode, or type a SKU (the code for one product) or a product name.
4. Under **On the shelf**, type how many are physically there, including units already set aside for orders not yet picked. Press **Save**.

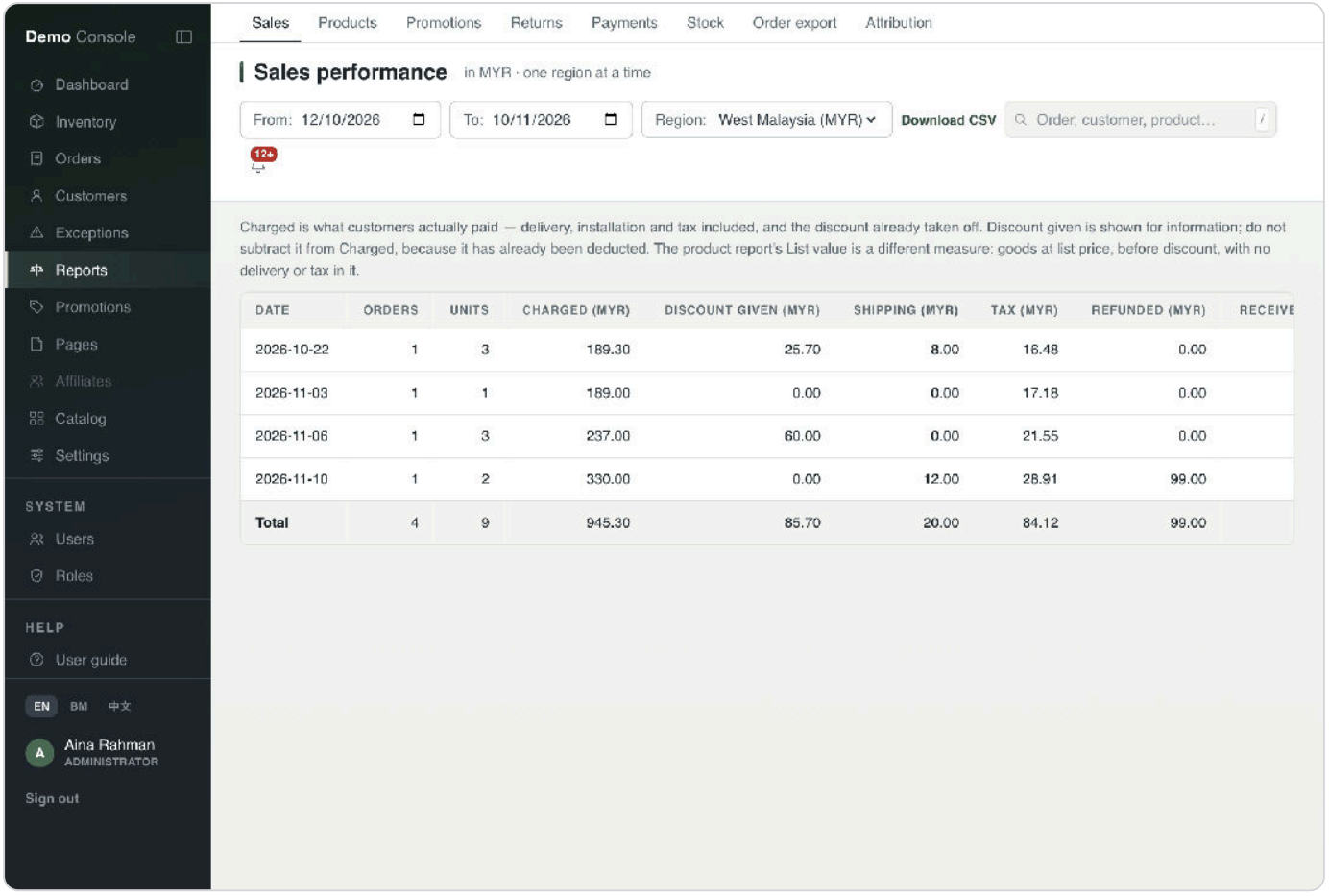

Demo Console
Dashboard
Inventory
Orders
Customers
Exceptions
Reports
Promotions
Pages
Affiliates
Catalog
Settings
SYSTEM
Users
Roles
HELP
Stock count
Demo Warehouse
← Stock counts
Order, customer, product…
12+
Add a product by SKU or name
Scan a barcode, or type a SKU or product name
Count everything physically at this outlet, including units already set aside for orders that have not been picked yet.
PAN-28
Non-stick Frying Pan 28cm
On the shelf
Save

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Read the reports

For: Finance, Merchandiser, Marketing

1. Open **Reports** in the menu.
2. Pick a report from the tabs: **Sales**, **Products**, **Promotions**, **Returns**, **Payments**, **Stock**, **Order export** or **Attribution** (where customers came from).
3. Choose the dates and one **Region**. Each region stays in its own currency; regions are never added together.
4. Press **Download CSV** for exactly what is on screen, to open in Excel.



Reading the sales report

- **Charged** is what customers paid: delivery, installation and tax included, with the discount already taken off. Do not subtract **Discount given** again.
- **Received** is the money taken less refunds.
- The figures are stored overnight at 02:00 for each day. A day with no row means nothing was sold, or the overnight figures did not run. If a message says **Some figures are missing**, check **Exceptions** before reading a gap as zero sales.

You only see the reports your role allows. For example, the sales and payment reports are for Finance and Administrators.

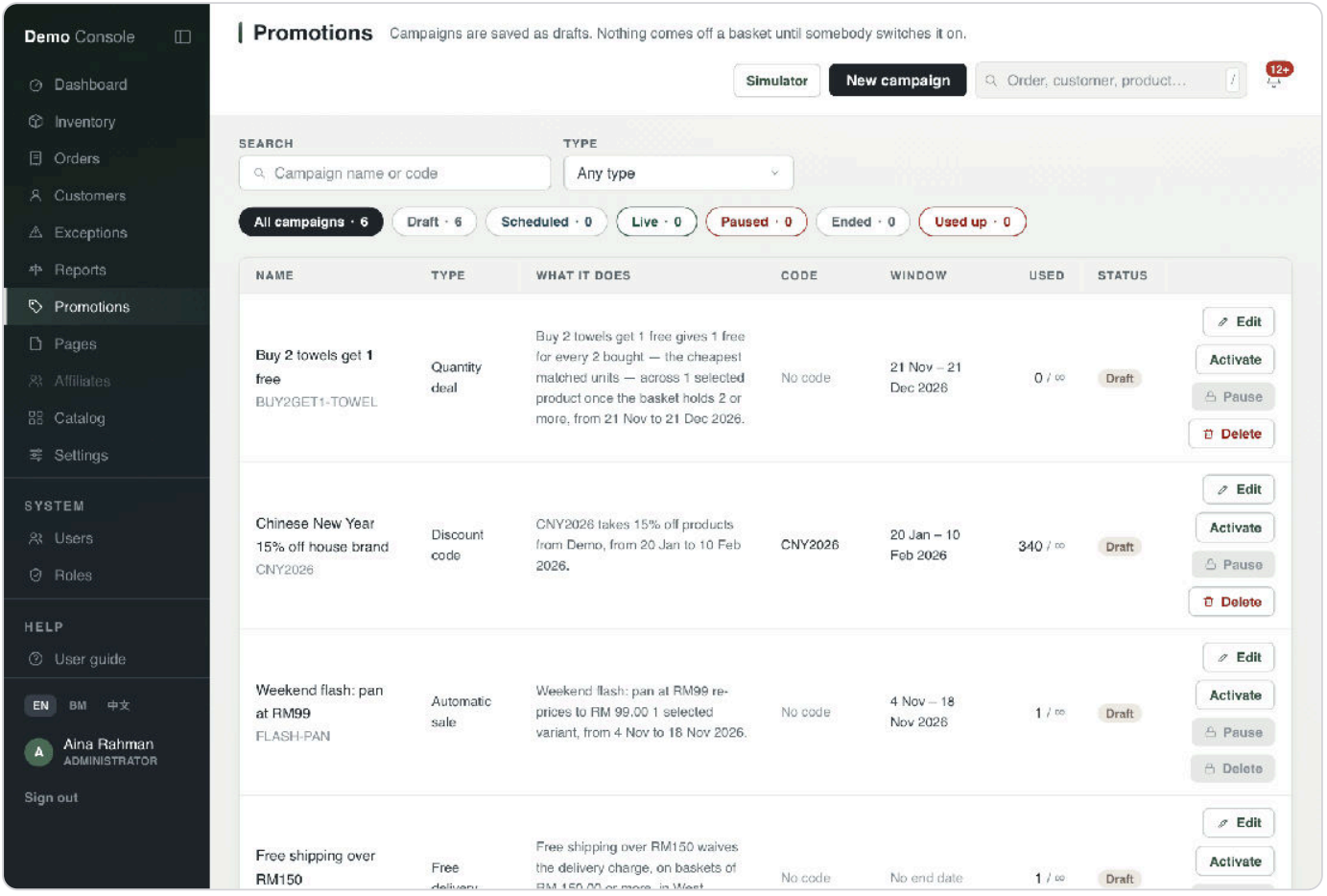
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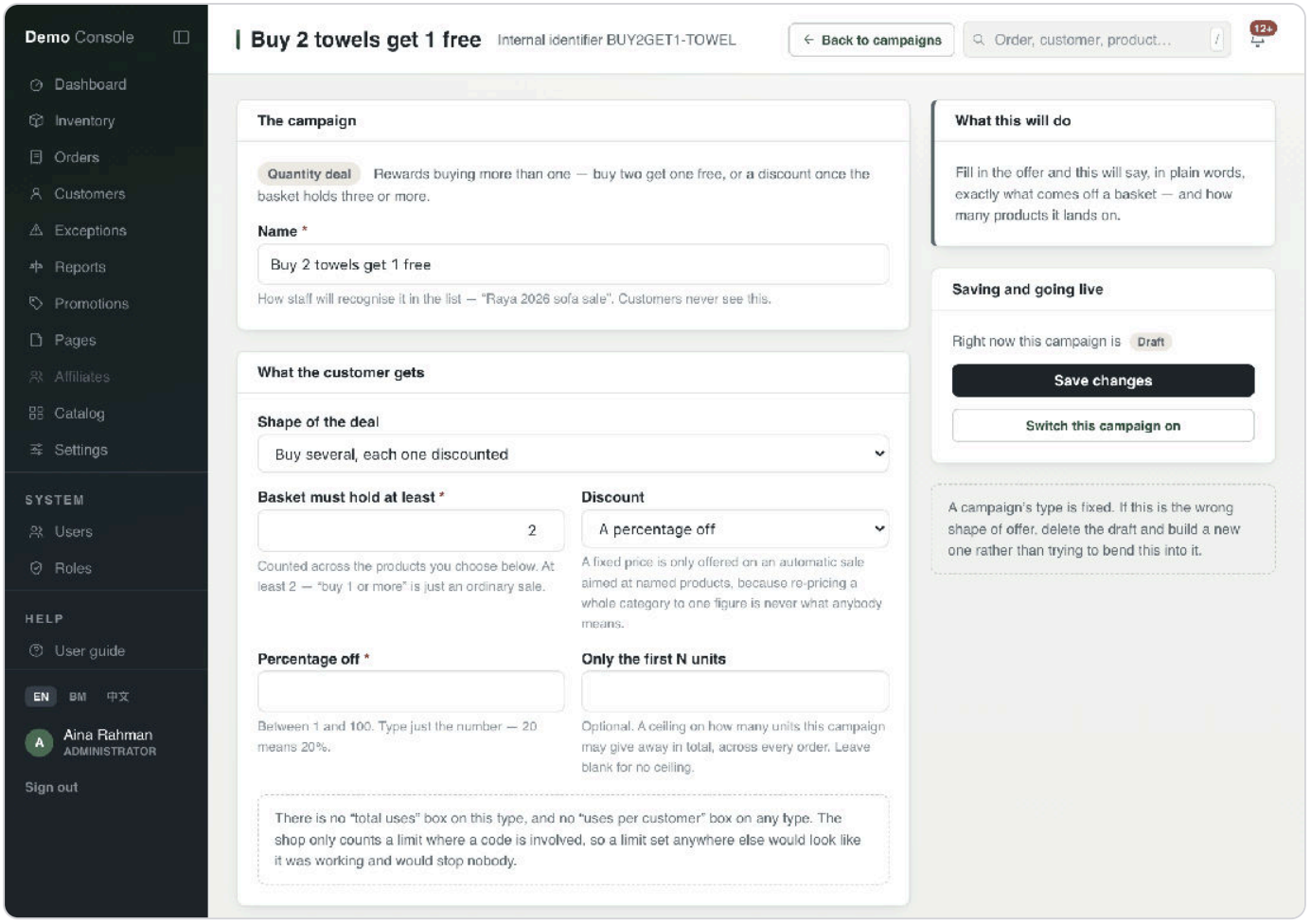
Run a promotion

For: Marketing

New campaigns are saved as drafts. Nothing comes off a customer's basket until someone switches the campaign on.

1. Open **Promotions** in the menu and press **New campaign**.
2. Under **What kind of campaign is this?**, pick **Discount code** (the customer types a code), **Automatic sale** (money comes off by itself), **Free delivery**, or **Quantity deal** (buy two get one free, or a discount once the basket holds several). You cannot change the kind later.
3. Fill in **The campaign**, **What the customer gets**, **What it applies to** and **When it runs**. Each field explains itself underneath. The **What this will do** box on the right says in plain words what will come off a basket.
4. Press **Save as draft** (or **Save changes** on a campaign you are editing). The campaign stays a draft.
5. When it should start, press **Switch this campaign on**.





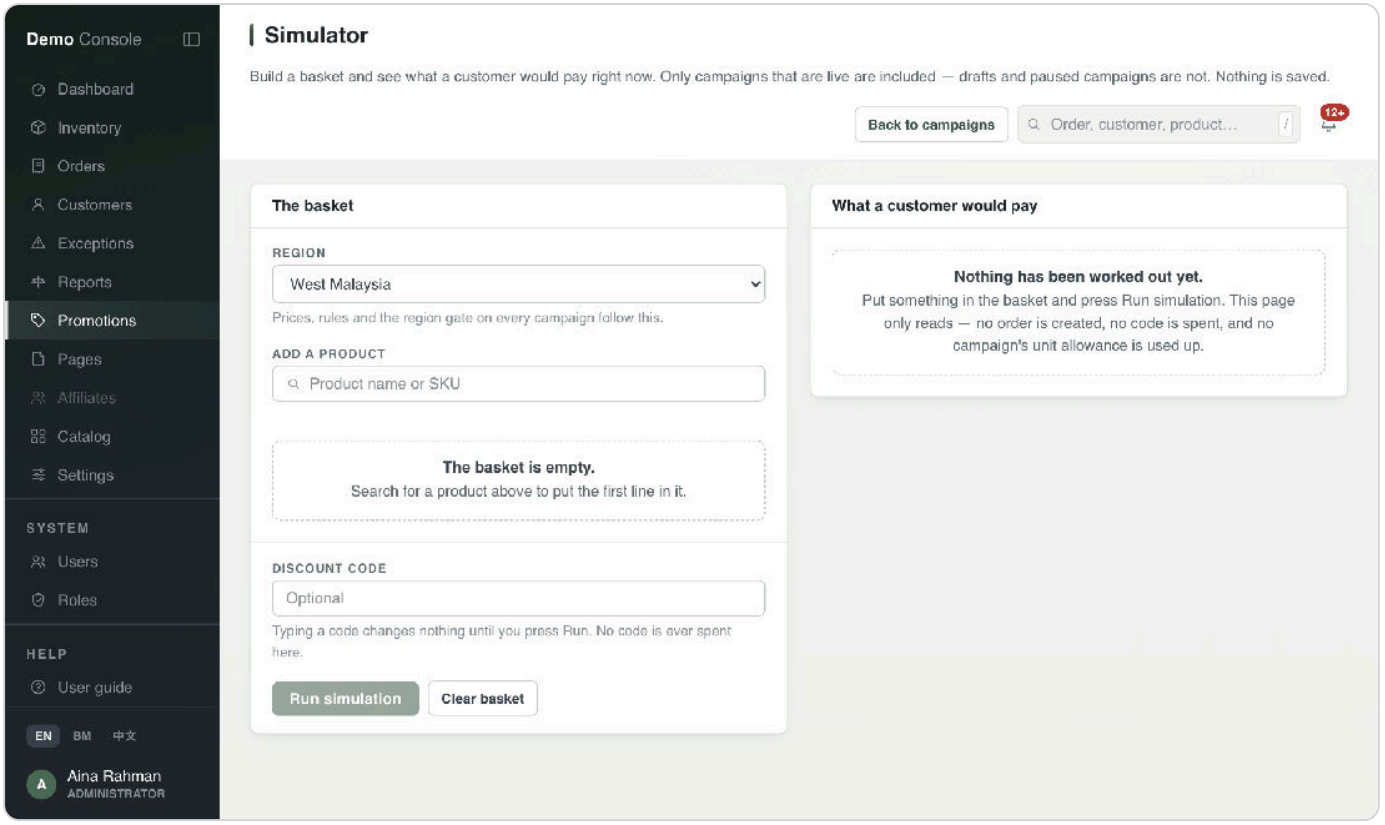
Status

A campaign is **Draft** until switched on, **Scheduled** until its start date, **Live** after that, **Ended** after its end date, and **Used up** once a code reaches its limit. **Pause** and **Delete** are locked while a campaign is a draft or once it has been used.

Only a discount code has a "total uses" limit. No campaign has a "uses per customer" limit.

Try it before customers do

Press **Simulator**. Choose a region, add products, type a discount code if you want, and press **Run simulation**. It shows what a customer would pay right now under the live campaigns. Drafts and paused campaigns are not included. Nothing is saved and no code is spent.



Finance staff are never allowed to create promotions.

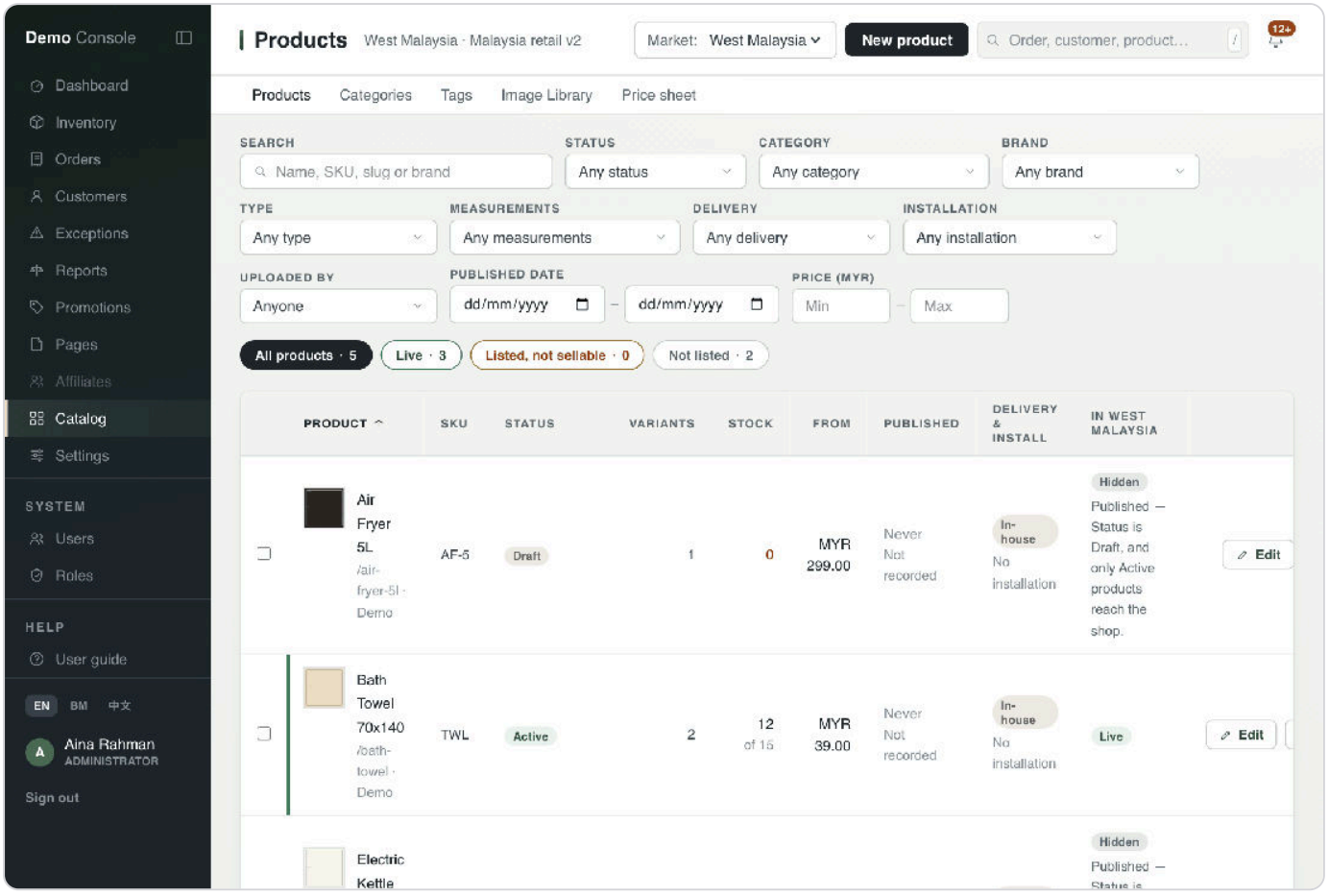
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Change products and categories

For: Merchandiser

Find a product

1. Open **Catalog** in the menu. The **Products** tab opens.
2. Choose the **Market** at the top. Each market has its own price list.
3. Search by name, SKU (the product code), slug or brand, or narrow the list with the filters. The pills split **Live**, **Listed, not sellable** and **Not listed** products.
4. Press **Edit** on a row, or **New product** to add one.

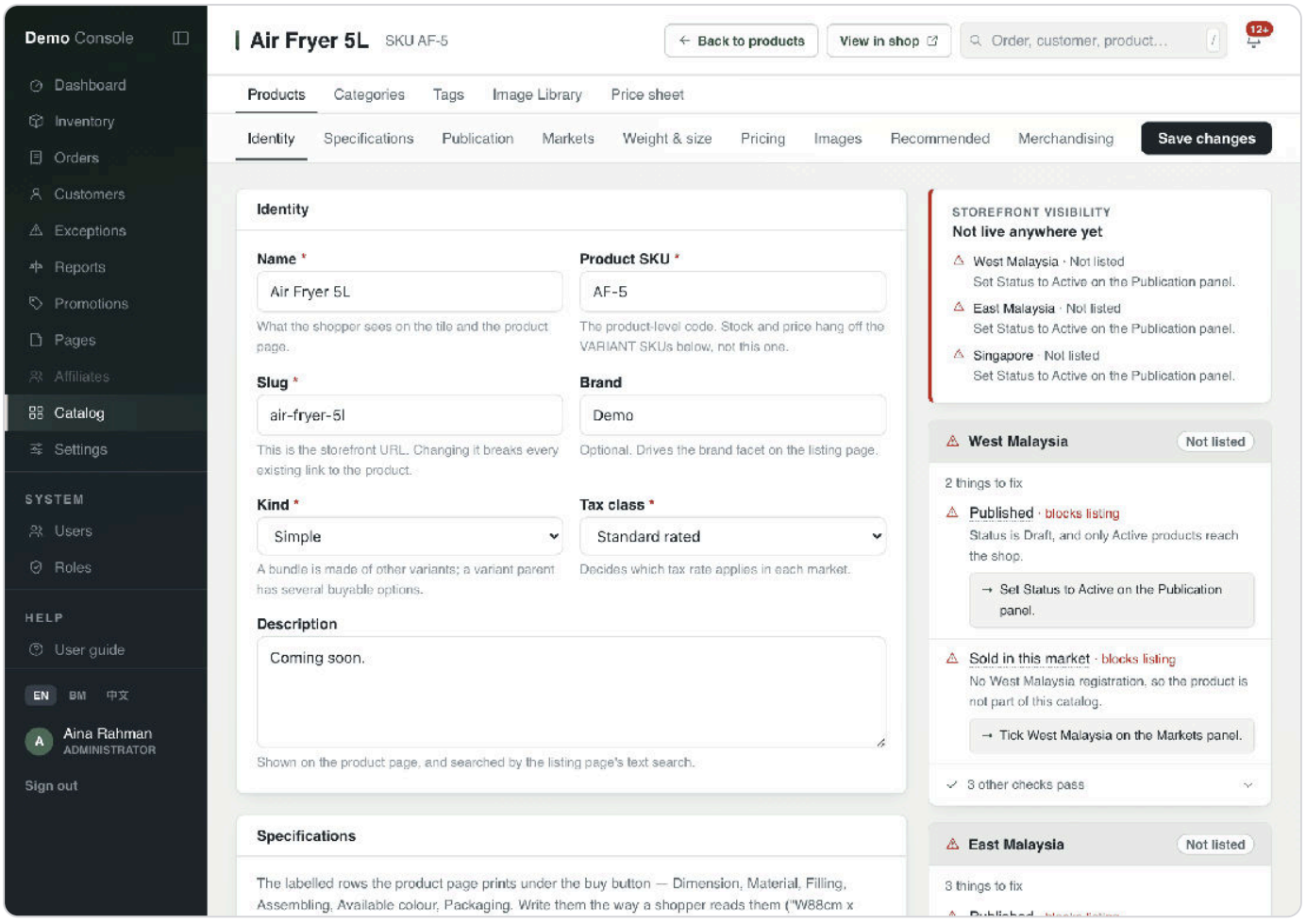


The last column shows whether the product is really on sale in that market. A product is live only when it is published, registered for that market, has an active option, and has a price on the market's current price list.

Change a product

1. The tabs across the top are **Identity**, **Specifications**, **Publication**, **Markets**, **Weight & size**, **Pricing**, **Images**, **Recommended** and **Merchandising**.

2. Make your change, then press **Save changes**. All tabs are saved together.
3. The box on the right says, per market, why the product is not on sale yet and what to fix.
4. **View in shop** opens the product page customers see.

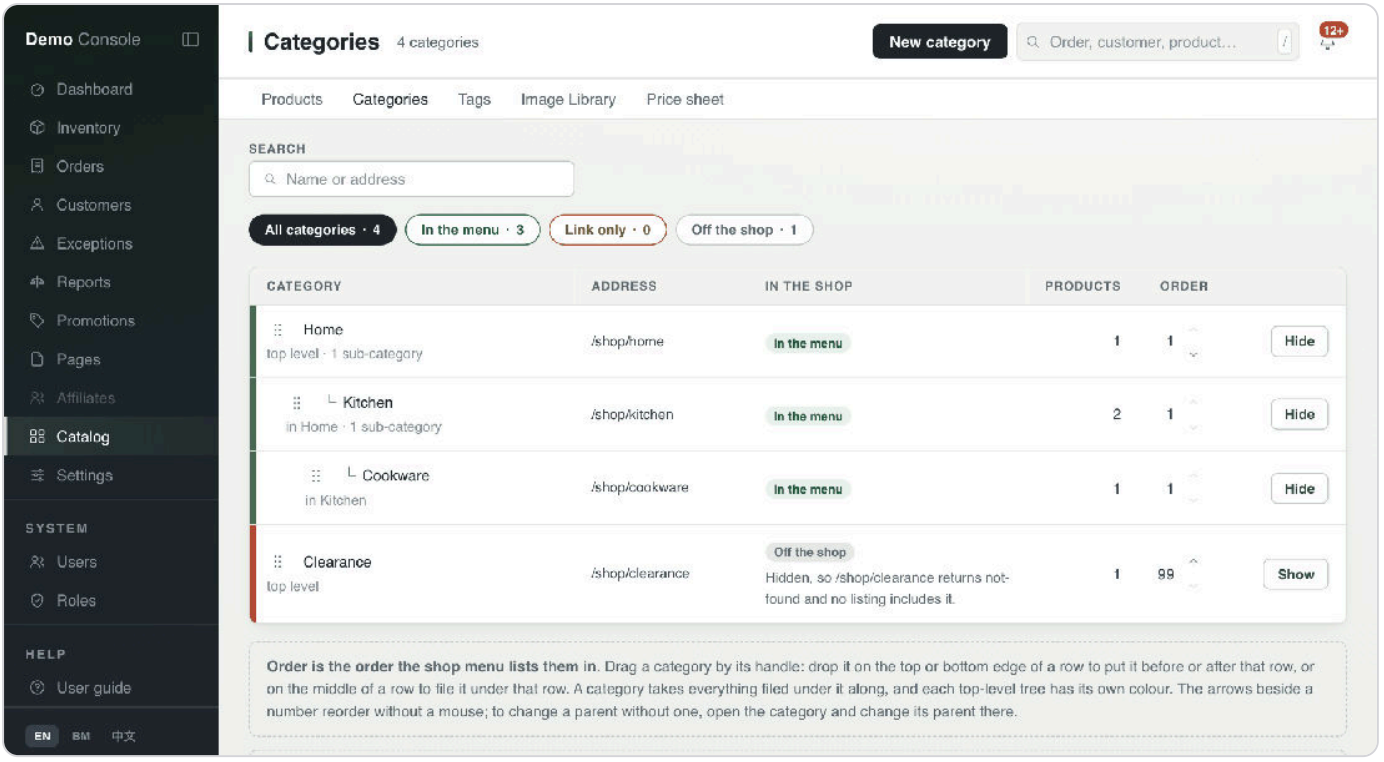


Changing a product's slug (its web address) breaks every existing link to it.

Stock is not changed here. A Merchandiser can shape products but never correct stock; that is done on the **Inventory** screens.

Categories

The **Categories** tab shows the shop's menu, in the order customers see it. Drag a category by its handle to move it. **Hide** takes a category off the shop without deleting it; **Show** puts it back. Press **New category** to add one.


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BM
中文
Categories
4 categories
New category
Order, customer, product…
12+
Products
Categories
Tags
Image Library
Price sheet
SEARCH
Name or address
All categories · 4
In the menu · 3
Link only · 0
Off the shop · 1
CATEGORY
ADDRESS
IN THE SHOP
PRODUCTS
ORDER
Home
top level · 1 sub-category
/shop/home
In the menu
1
1
Hide
Kitchen
in Home · 1 sub-category
/shop/kitchen
In the menu
2
1
Hide
Cookware
in Kitchen
/shop/cookware
In the menu
1
1
Hide
Clearance
top level
/shop/clearance
Off the shop
Hidden, so /shop/clearance returns not-found and no listing includes it.
1
99
Show
Order is the order the shop menu lists them in. Drag a category by its handle: drop it on the top or bottom edge of a row to put it before or after that row, or on the middle of a row to file it under that row. A category takes everything filed under it along, and each top-level tree has its own colour. The arrows beside a number reorder without a mouse; to change a parent without one, open the category and change its parent there.

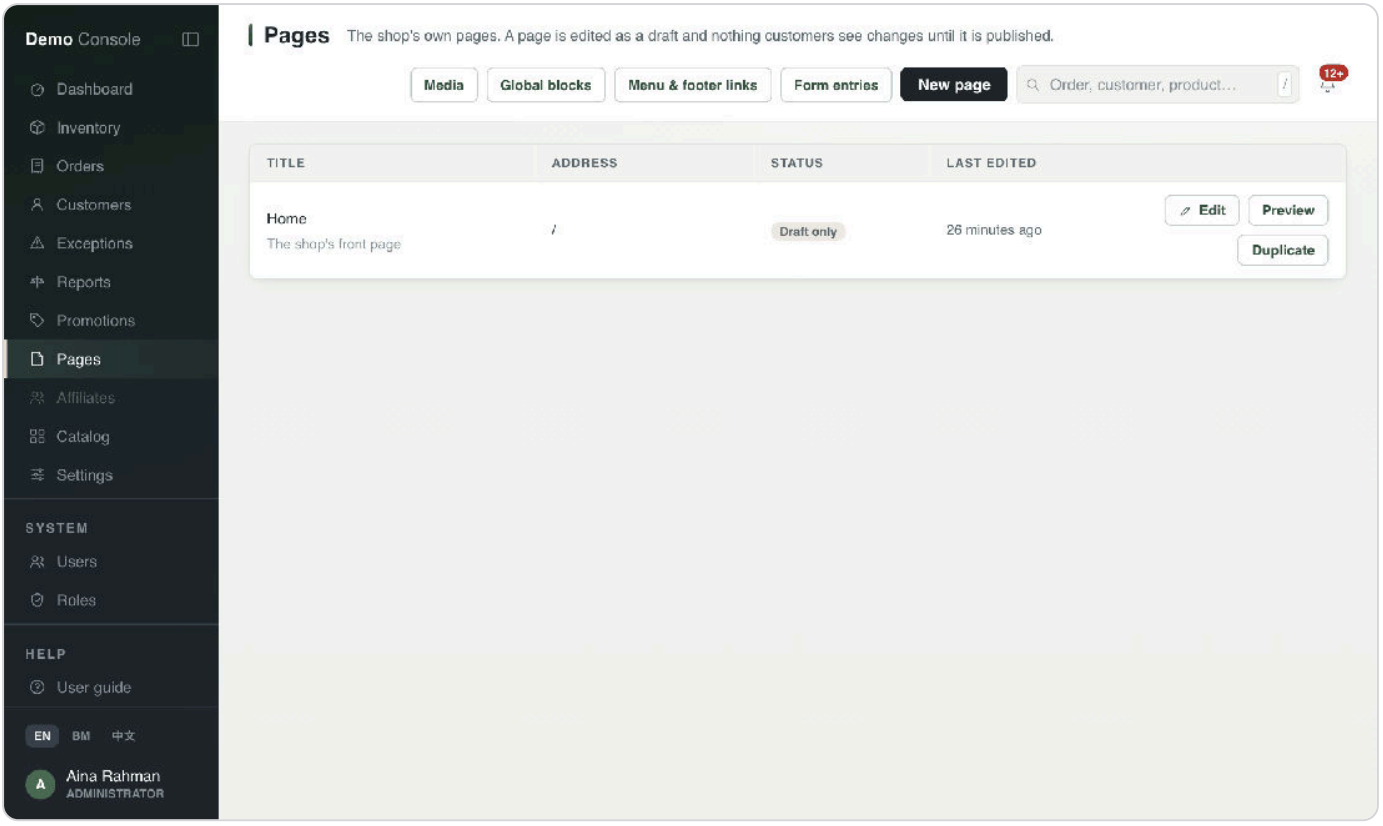
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Edit the shop's pages

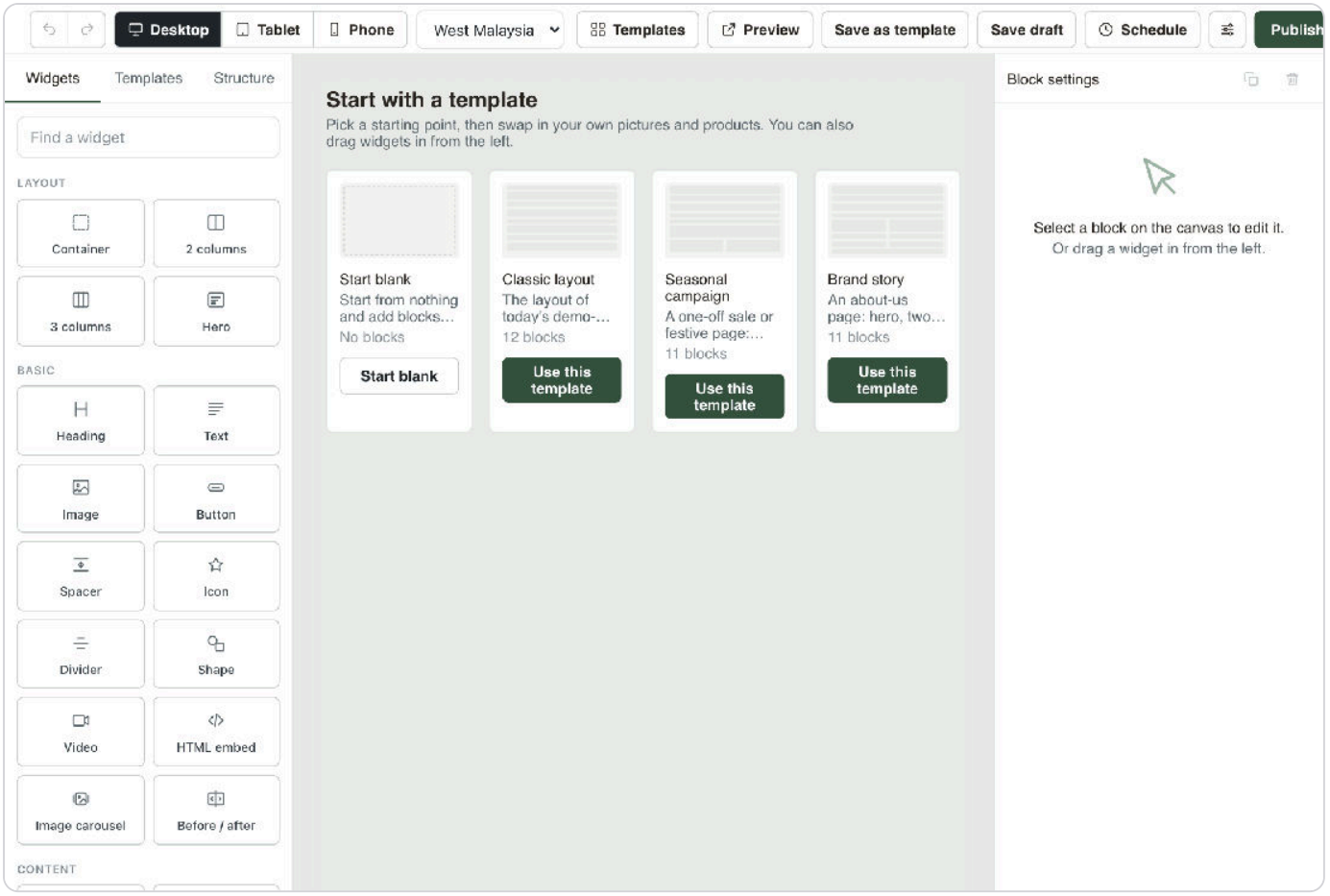
For: Marketing

The shop's own pages, such as the home page, are built here. You edit a draft; customers see nothing until you publish it.

1. Open **Pages** in the menu.
2. Press **Edit** on a page, **Duplicate** to copy one, or **New page**.



3. A new page can start from a template: press **Use this template**, or **Start blank**.
4. Drag blocks from **Widgets** on the left onto the page, such as **Heading**, **Text**, **Image** or **Button**. Click a block to change it in **Block settings** on the right.
5. **Desktop**, **Tablet** and **Phone** at the top show how the page looks on each screen.
6. Press **Save draft** to keep your work, **Preview** to see it as customers will, **Schedule** to publish at a set time, or **Publish** to put it live now.



The buttons above the page list open the shared **Media** library, **Global blocks** (blocks reused on many pages), **Menu & footer links**, and **Form entries** (what customers sent through forms on your pages).

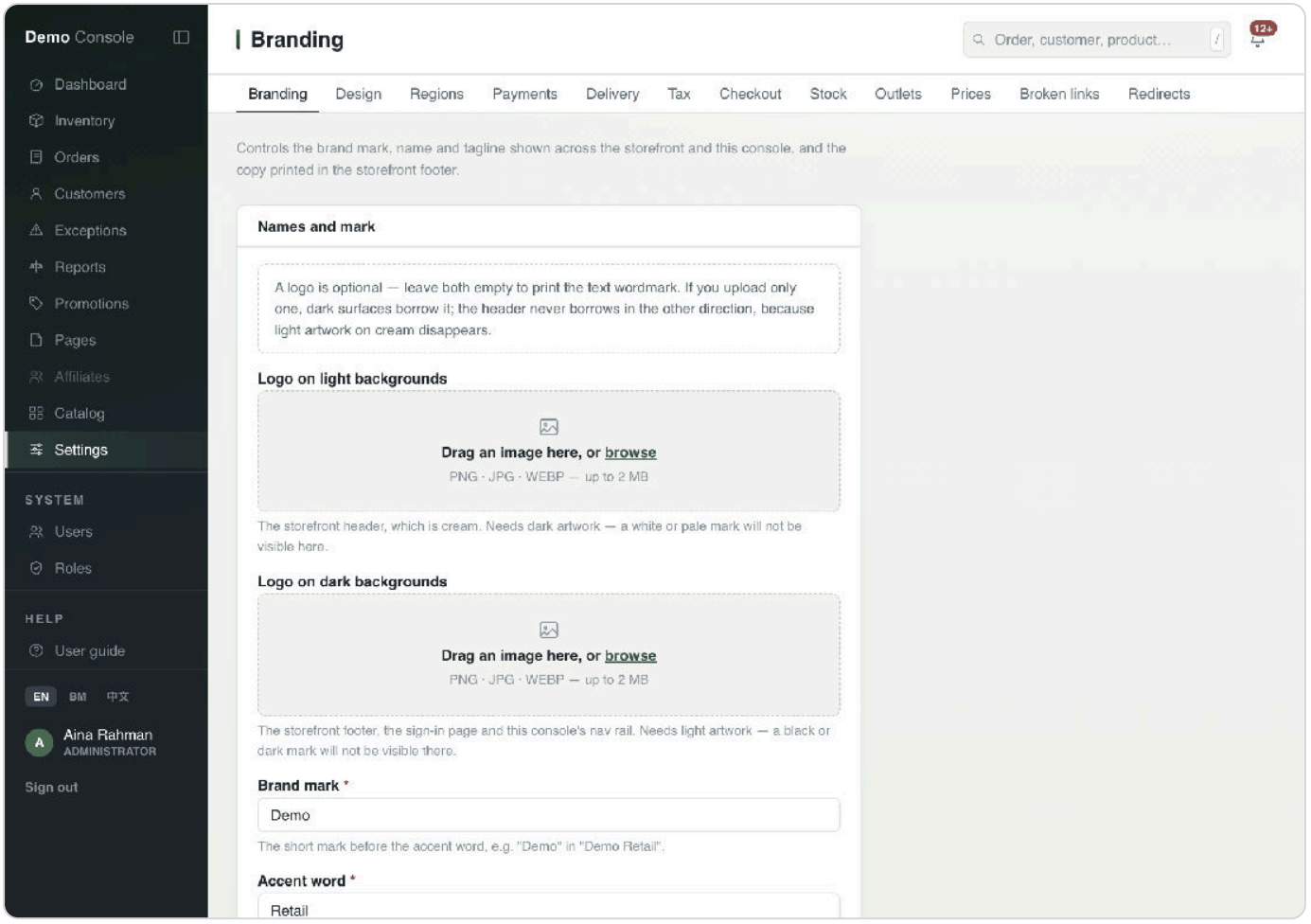
E-COMMERCE

Shop settings

For: Administrators

Open **Settings** in the menu. The tabs across the top hold the shop's set-up. Most staff never need them.

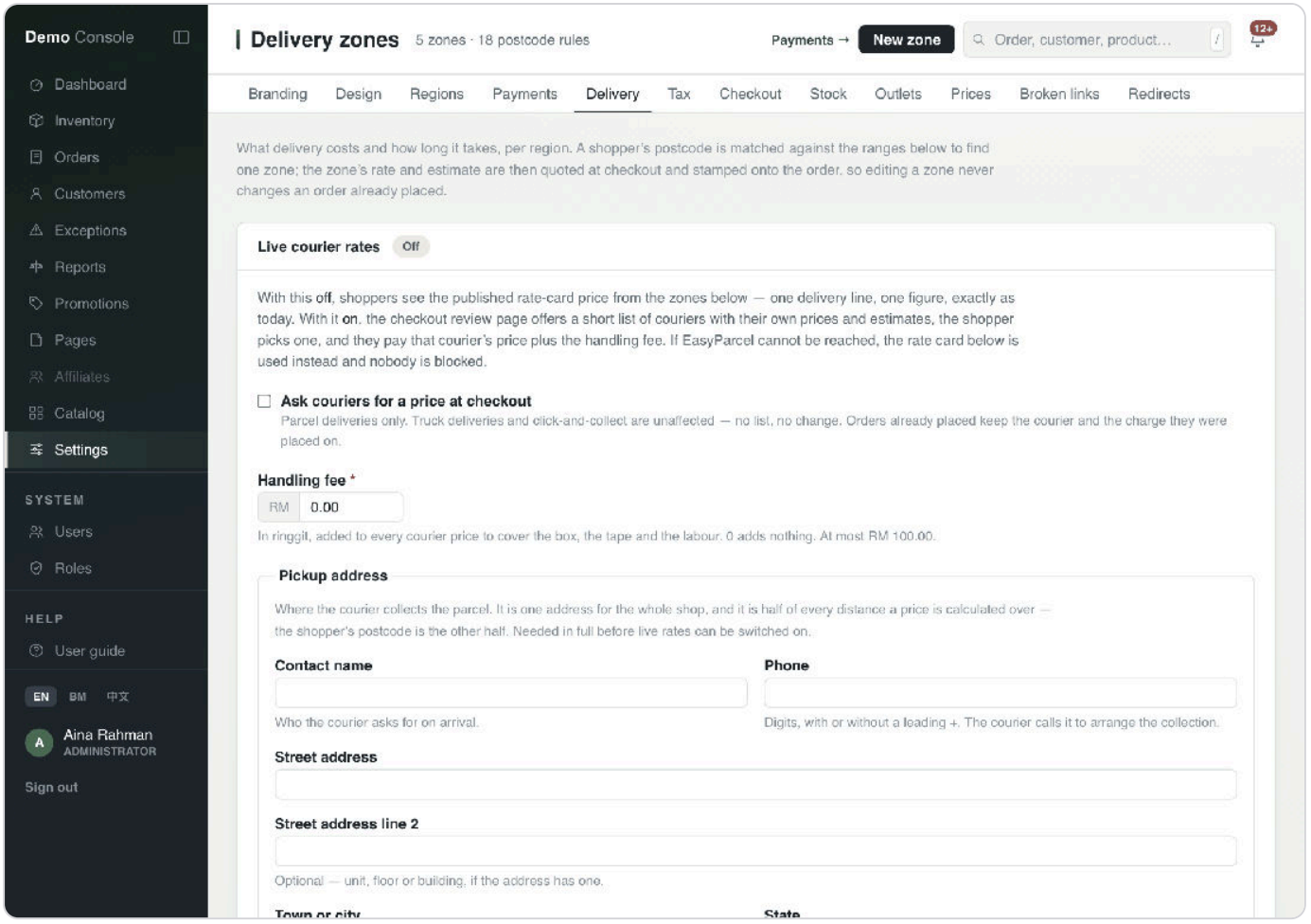
Tab	What it controls
Branding	Your logos, the shop's name, tagline and footer text.
Design	Named colours every shop page can use. Changing one repaints every page that uses it.
Regions	The markets the shop sells in, each with its currency, tax and language.
Payments	Which payment methods each region offers, and in what order.
Delivery	Delivery zones and prices by postcode, and live courier prices.
Tax	Tax rates per region. A change starts a new rate from a date; old rates are kept.
Checkout	How long stock is held for a customer who is paying, between 3 and 240 minutes.
Stock	Keep a number of units of every item back from the online shop, so the last units on the shelf are not sold online.
Outlets	Every outlet and warehouse, whether customers can buy from it or collect there, and which is used first.
Prices	The price lists per market. One is live; older ones are kept.
Broken links, **Redirects**	Old web addresses customers still visit, and where to send them.



Delivery

Each delivery zone covers a set of postcodes in one region, with its price and how many working days it takes. Press **New zone** to add one.

With **Live courier rates** off, customers see the zone price. Tick **Ask couriers for a price at checkout** to show customers a list of couriers with their own prices instead. You then need a **Pickup address** and can add a **Handling fee**. This works for parcels only, not truck deliveries or click-and-collect.


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Branding Design Regions Payments Delivery Tax Checkout Stock Outlets Prices Broken links Redirects
What delivery costs and how long it takes, per region. A shopper's postcode is matched against the ranges below to find one zone; the zone's rate and estimate are then quoted at checkout and stamped onto the order, so editing a zone never changes an order already placed.
Live courier rates
Off
With this off, shoppers see the published rate-card price from the zones below — one delivery line, one figure, exactly as today. With it on, the checkout review page offers a short list of couriers with their own prices and estimates, the shopper picks one, and they pay that courier's price plus the handling fee. If EasyParcel cannot be reached, the rate card below is used instead and nobody is blocked.
Ask couriers for a price at checkout
Parcel deliveries only. Truck deliveries and click-and-collect are unaffected — no list, no change. Orders already placed keep the courier and the charge they were placed on.
Handling fee *
RM 0.00
In ringgit, added to every courier price to cover the box, the tape and the labour. 0 adds nothing. At most RM 100.00.
Pickup address
Where the courier collects the parcel. It is one address for the whole shop, and it is half of every distance a price is calculated over — the shopper's postcode is the other half. Needed in full before live rates can be switched on.
Contact name
Who the courier asks for on arrival.
Phone
Digits, with or without a leading +. The courier calls it to arrange the collection.
Street address
Street address line 2
Optional — unit, floor or building, if the address has one.
Town or city
State

E-COMMERCE

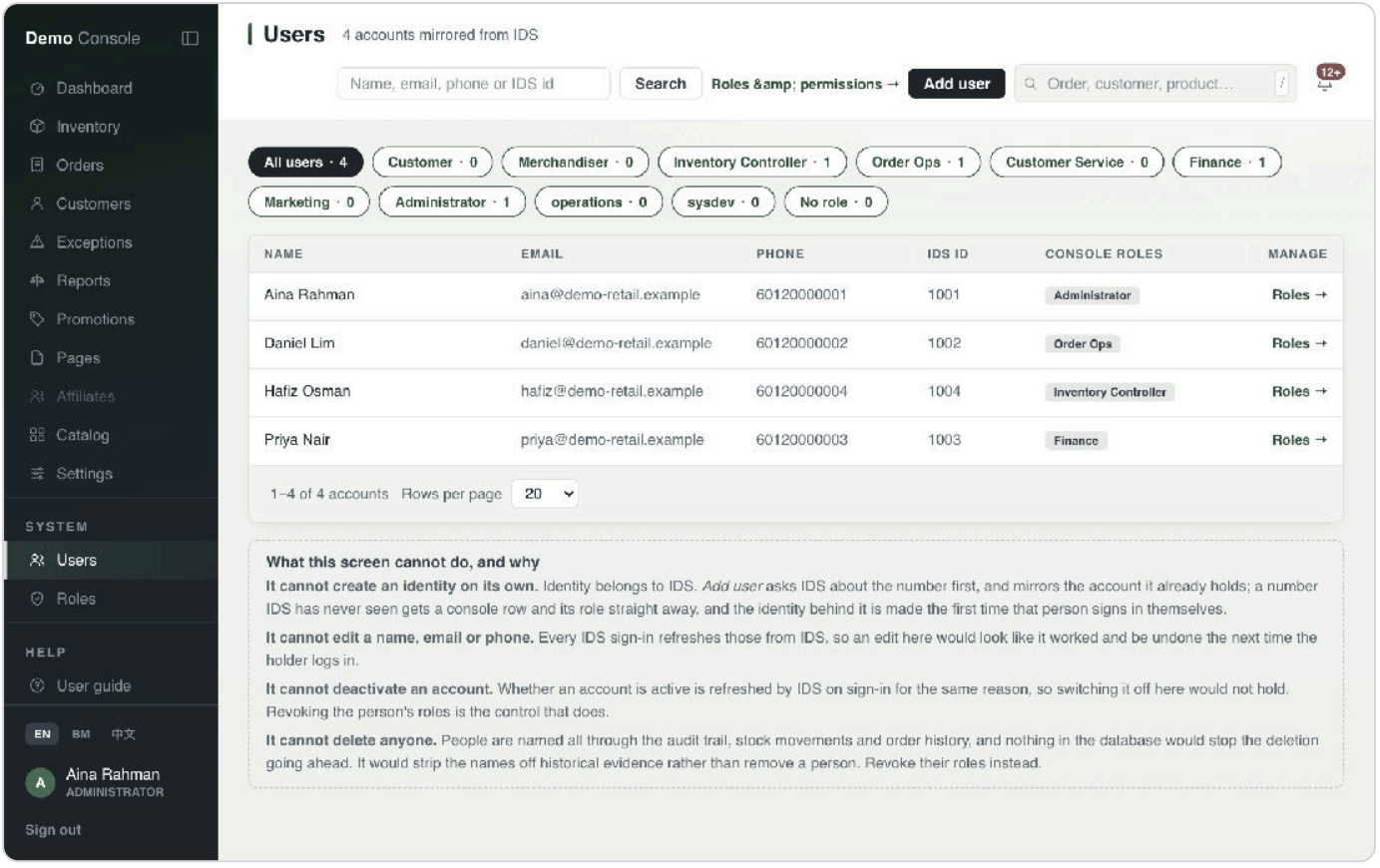
Give staff access

For: Administrators

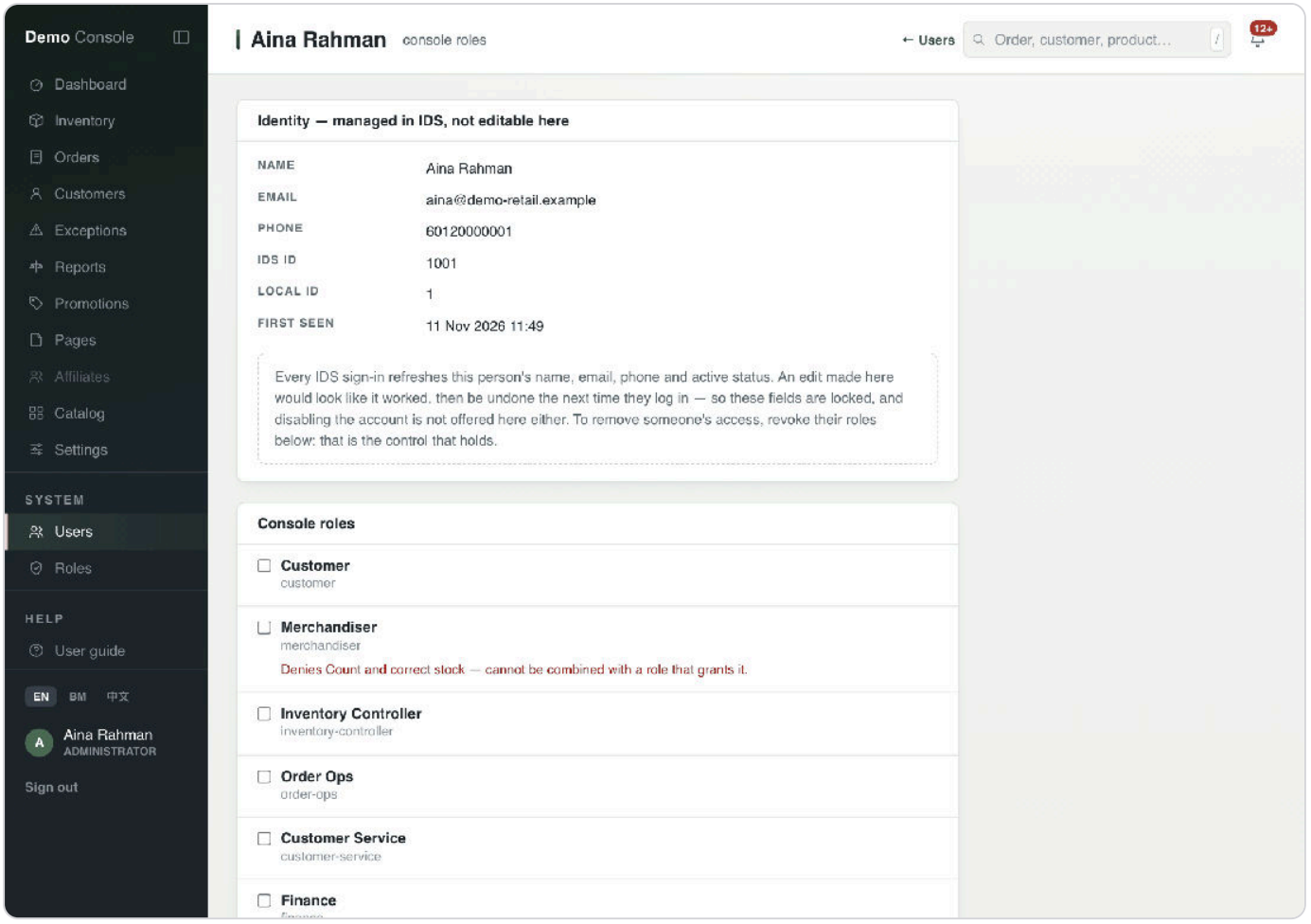
People sign in with your company's shared sign-in account (IDS). This screen only decides what each person can do in the console.

Give someone a role

1. Open **Users** in the menu. Use the pills to see who holds each role.
2. Press **Roles →** on a person's row. To add someone not on the list, press **Add user** and type their mobile number; the console looks the number up first.
3. Tick their roles and press **Save roles**.



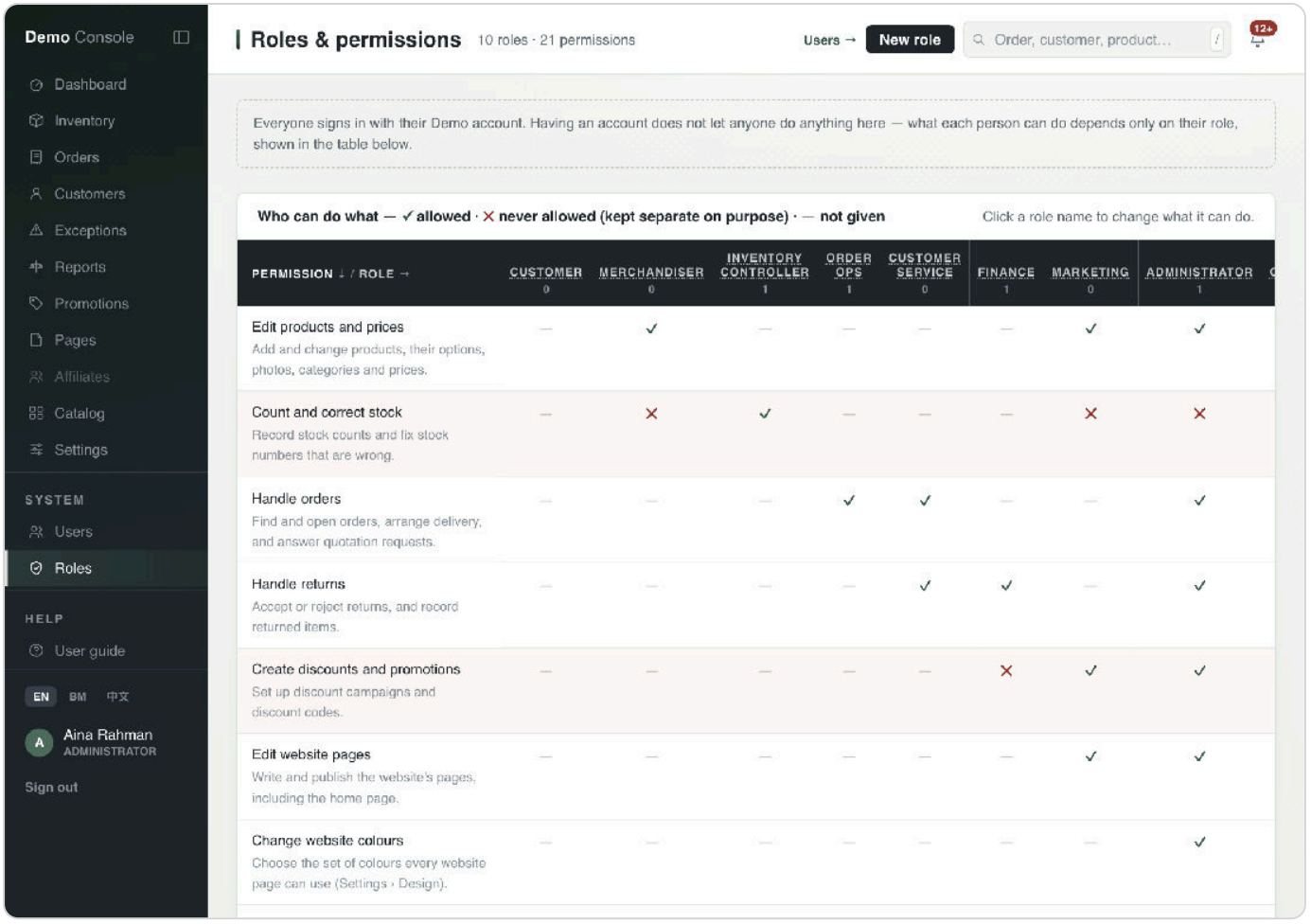
A person's name, email and phone cannot be edited here. They come from the sign-in account and are refreshed every time the person signs in. To remove someone's access, untick all their roles. People cannot be deleted, because their name stays on orders and stock records.



Some roles cannot be combined. For example, a person cannot hold Administrator and Inventory Controller together, because an Administrator is never allowed to correct stock. The page says so under the role before you save.

See what each role can do

Open **Roles**. The table shows every permission down the side and every role across the top: ✓ allowed, ✕ never allowed (kept separate on purpose), — not given. Click a role name to change it, or press **New role**.


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Roles & permissions
10 roles · 21 permissions
Users →
New role
Order, customer, product…
/
12+
Everyone signs in with their Demo account. Having an account does not let anyone do anything here — what each person can do depends only on their role, shown in the table below.
Who can do what — ✓ allowed · ✕ never allowed (kept separate on purpose) · — not given
Click a role name to change what it can do.
PERMISSION ↓ / ROLE →
CUSTOMER 0
MERCHANDISER 0
INVENTORY CONTROLLER 1
ORDER OPS 1
CUSTOMER SERVICE 0
FINANCE 1
MARKETING 0
ADMINISTRATOR 1
Edit products and prices
Add and change products, their options, photos, categories and prices.
Count and correct stock
Record stock counts and fix stock numbers that are wrong.
Handle orders
Find and open orders, arrange delivery, and answer quotation requests.
Handle returns
Accept or reject returns, and record returned items.
Create discounts and promotions
Set up discount campaigns and discount codes.
Edit website pages
Write and publish the website's pages, including the home page.
Change website colours
Choose the set of colours every website page can use (Settings › Design).