Common Processes

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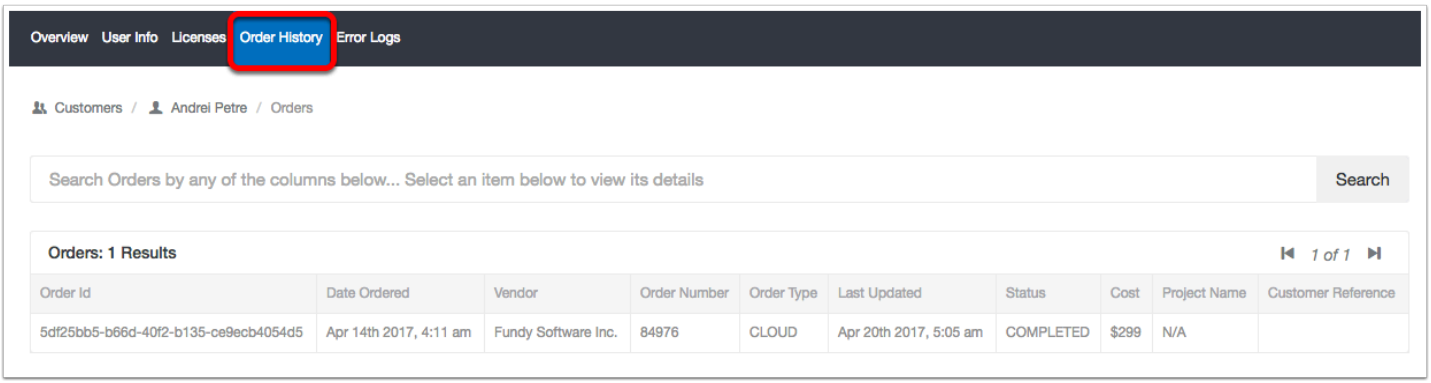
Support

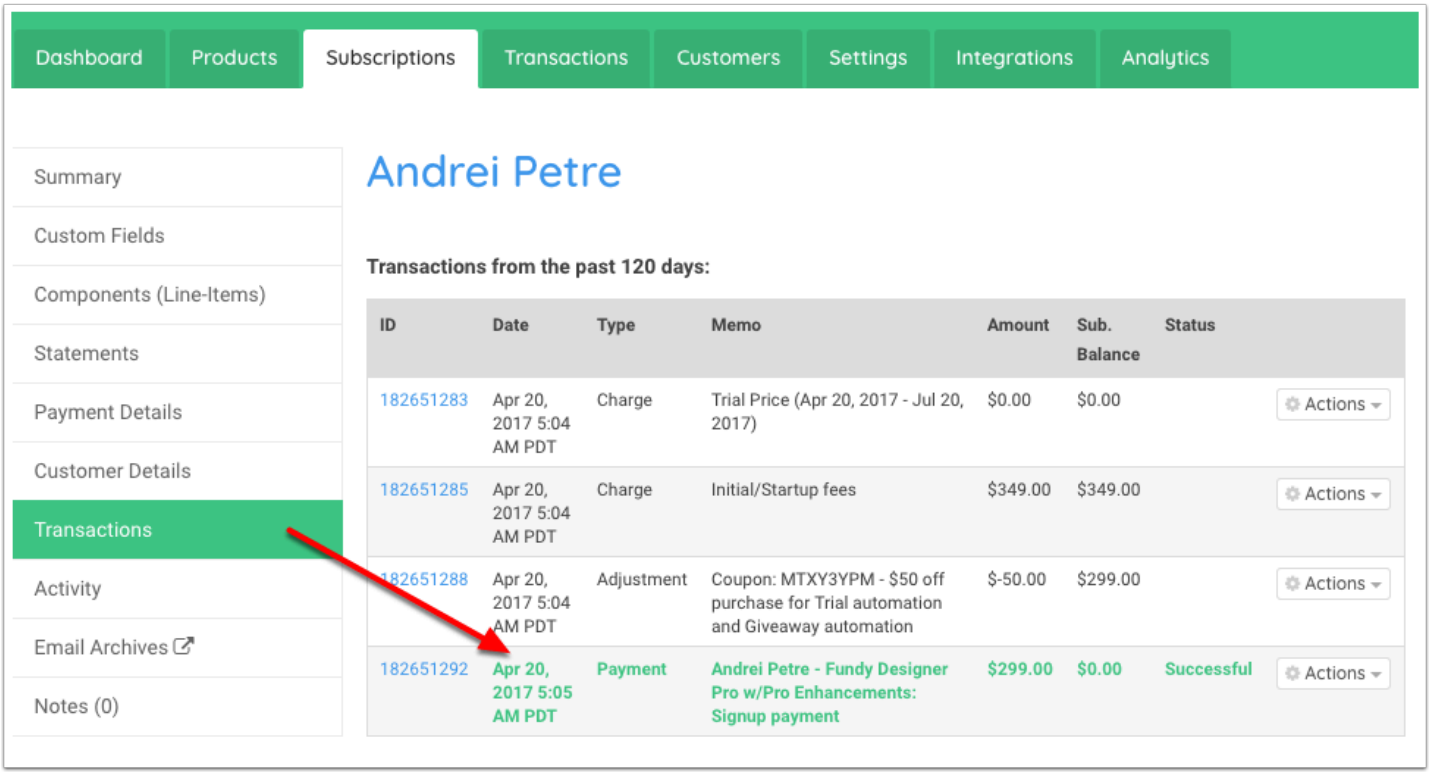
Process a Refund (Software)

Software can be refunded within 30 days of the purchase date and requires both refunding the charge and removing the license.

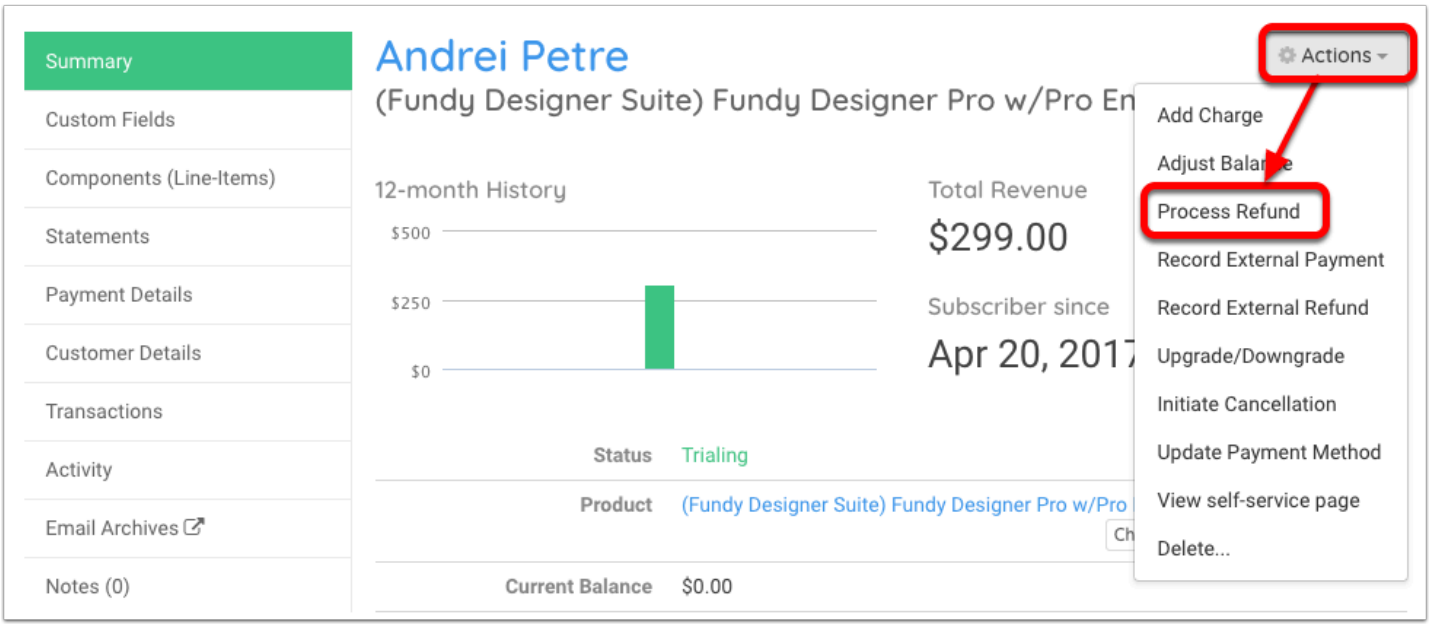
1. **Find transaction in Command Center** to confirm date or purchase and amount.

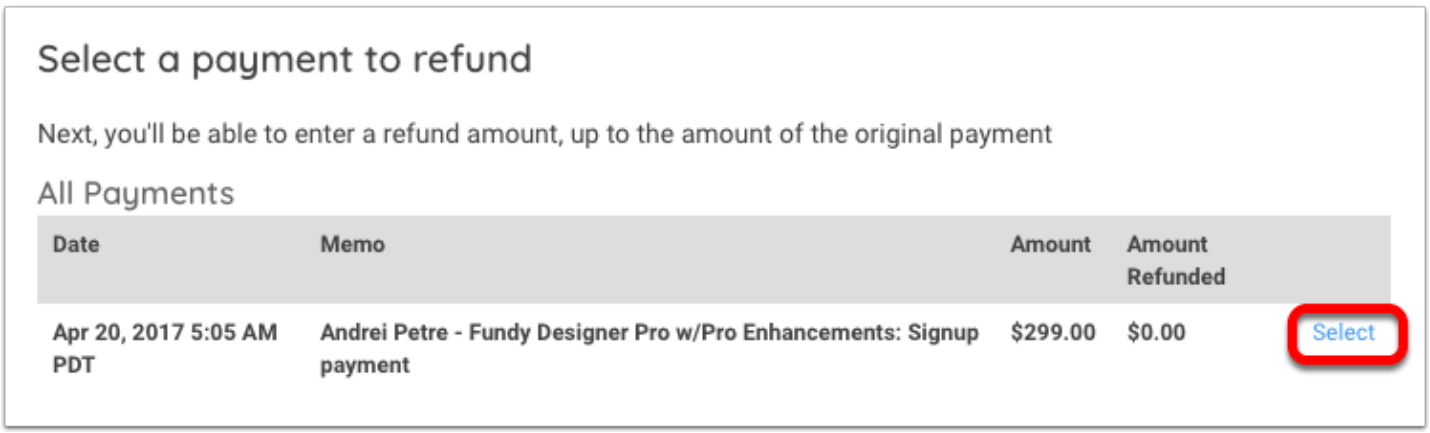


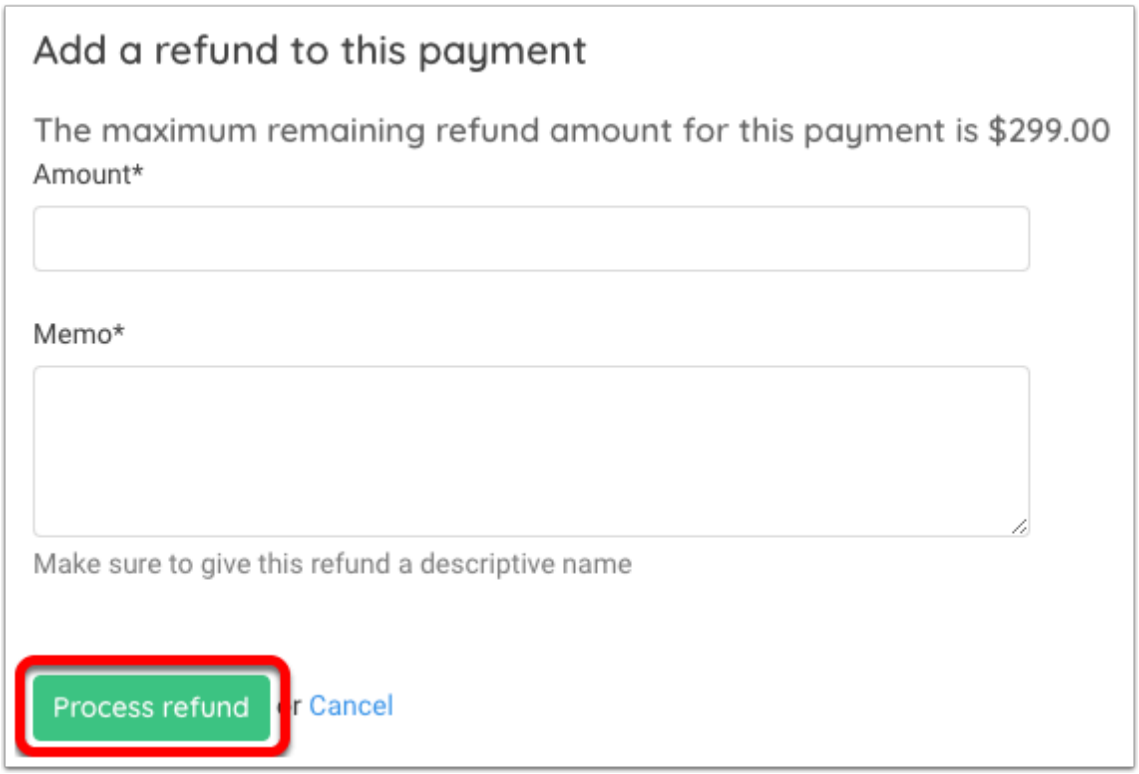
2. **Find transaction in Charigify**



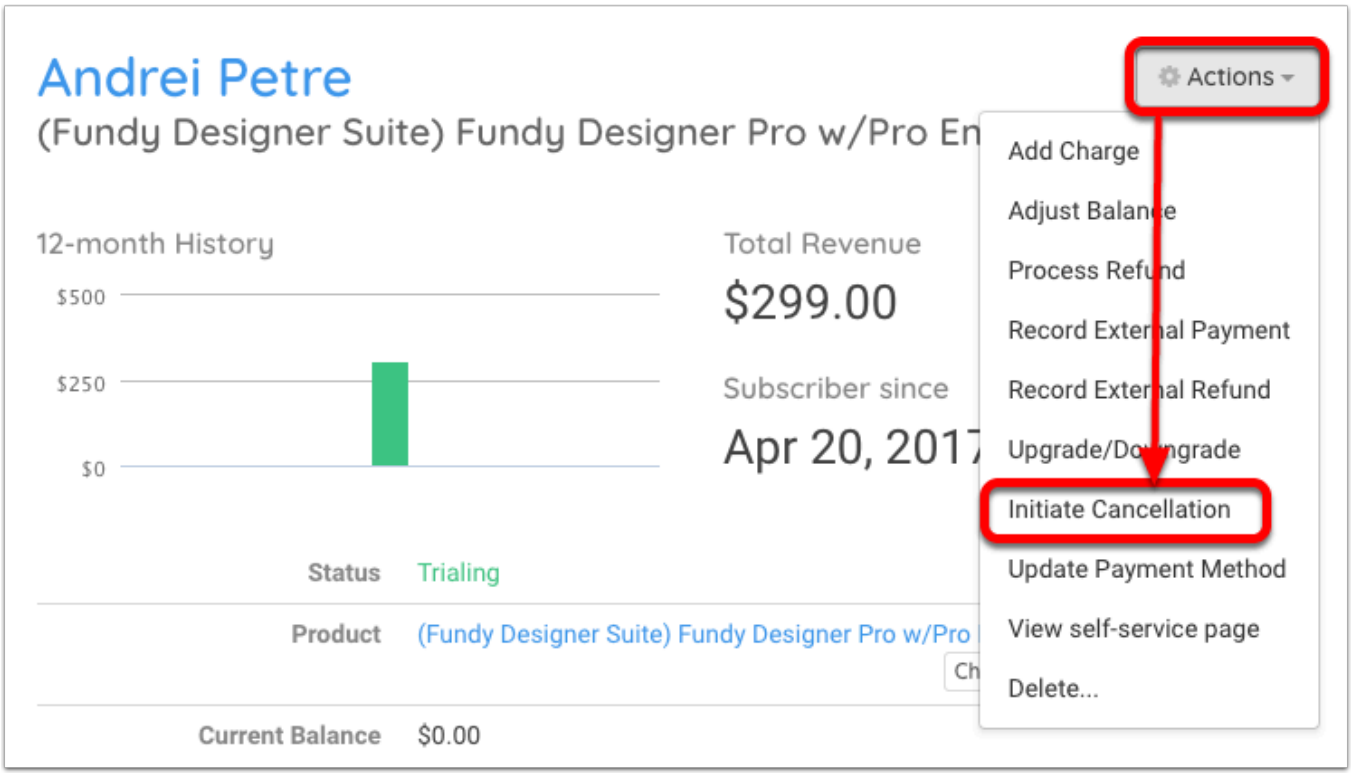
3. **On the Summary page of Chargify** use Actions > Process Refund

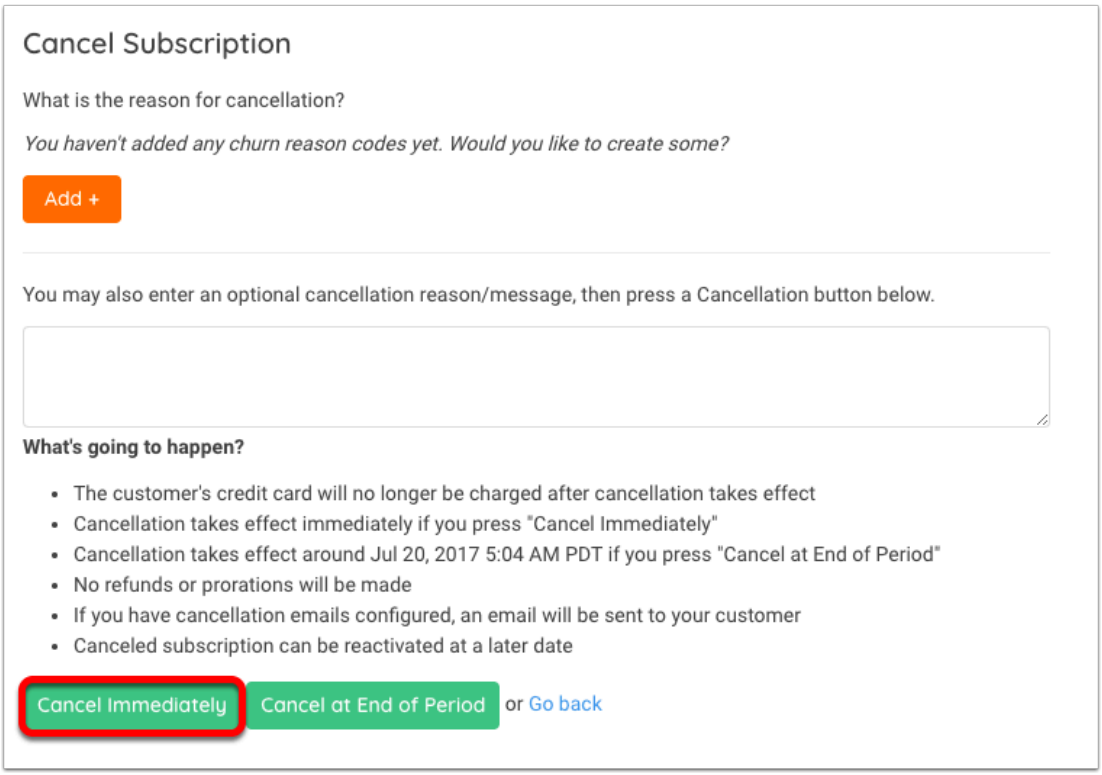

Summary
Custom Fields
Components (Line-Items)
Statements
Payment Details
Customer Details
Transactions
Activity
Email Archives
Notes (0)
Andrei Petre
(Fundy Designer Suite) Fundy Designer Pro w/Pro En
Actions
Add Charge
Adjust Bala
Process Refund
Record External Payment
Record External Refund
Upgrade/Downgrade
Initiate Cancellation
Update Payment Method
View self-service page
Delete...
12-month History
$500
$250
$0
Total Revenue
$299.00
Subscriber since
Apr 20, 201
Status
Trialing
Product
(Fundy Designer Suite) Fundy Designer Pro w/Pro
Current Balance
$0.00


Select a payment to refund
Next, you'll be able to enter a refund amount, up to the amount of the original payment
All Payments
Date
Memo
Amount
Amount Refunded
Apr 20, 2017 5:05 AM PDT
Andrei Petre - Fundy Designer Pro w/Pro Enhancements: Signup payment
$299.00
$0.00
Select

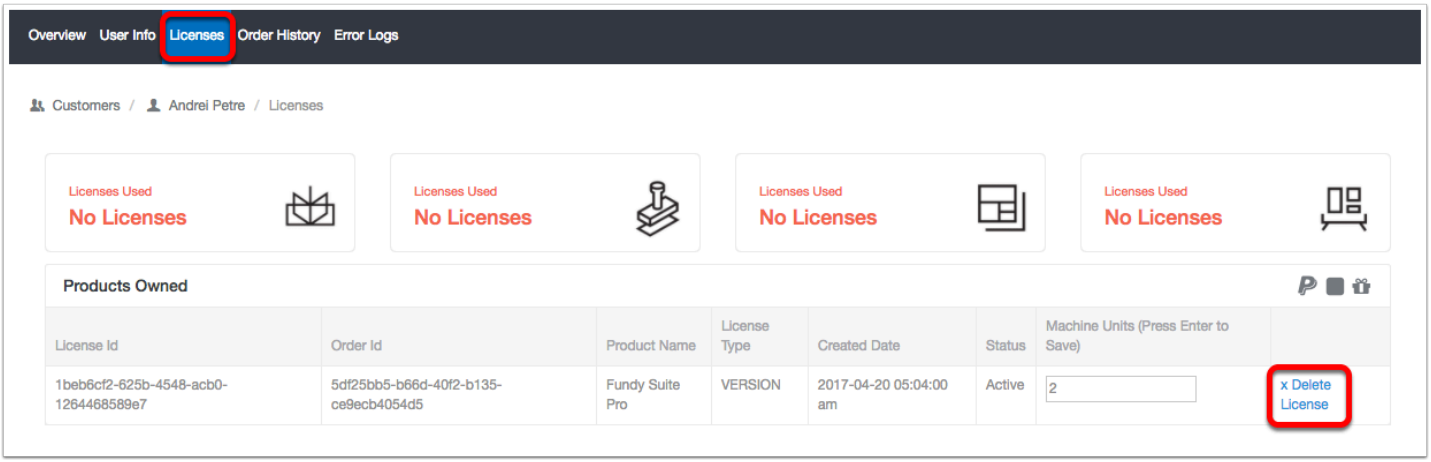


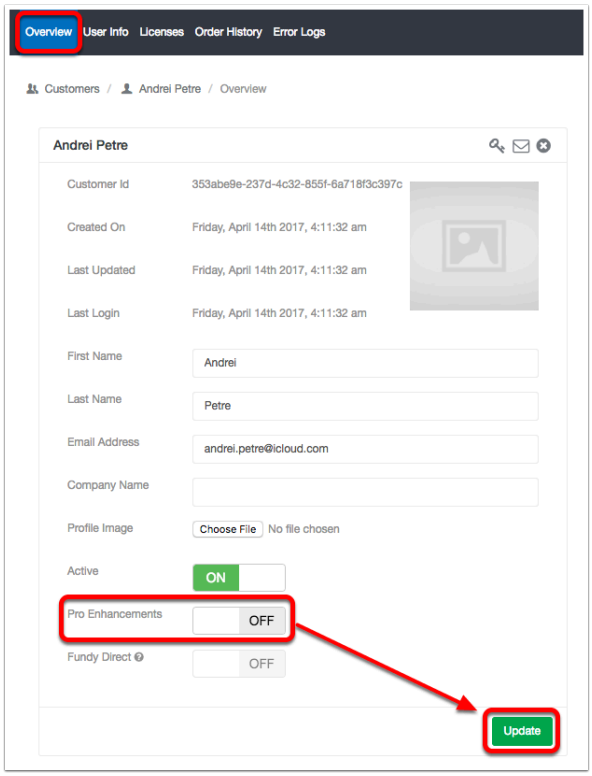
4. Cancel Pro Enhancements subscription using Actions > Initiate Cancellation. In most cases this will be "Immediately"





5. Remove license and Pro Enhancements from Command Center and make sure to save the change!

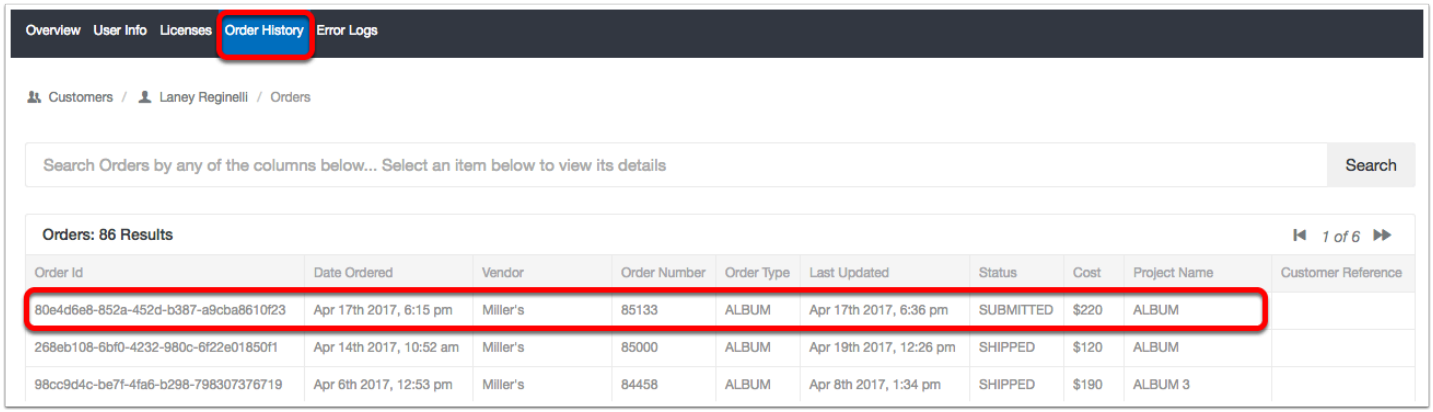



Overview
User Info
Licenses
Order History
Error Logs
Customers / Andrei Petre / Overview
Andrei Petre
Customer Id
353abe9e-237d-4c32-855f-6a718f3c397c
Created On
Friday, April 14th 2017, 4:11:32 am
Last Updated
Friday, April 14th 2017, 4:11:32 am
Last Login
Friday, April 14th 2017, 4:11:32 am
First Name
Andrei
Last Name
Petre
Email Address
andrei.petre@icloud.com
Company Name
Profile Image
Choose File
No file chosen
Active
ON
Pro Enhancements
OFF
Fundy Direct
OFF
Update

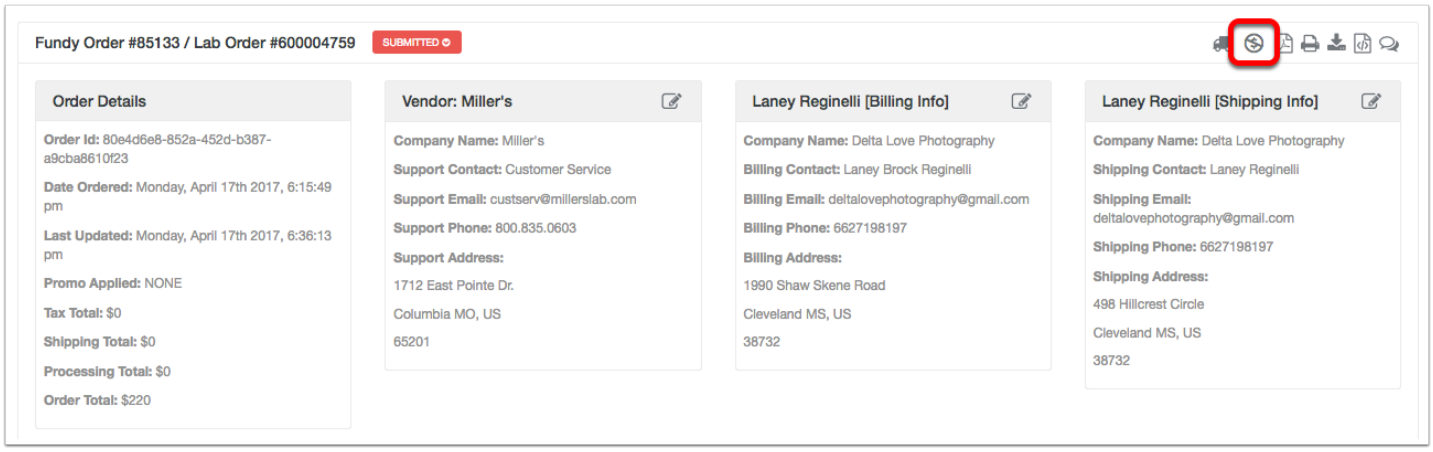
Process a Refund (Direct Order)

Fundy Direct orders are through Braintree, not Chargify, and can be processed in Command Center.

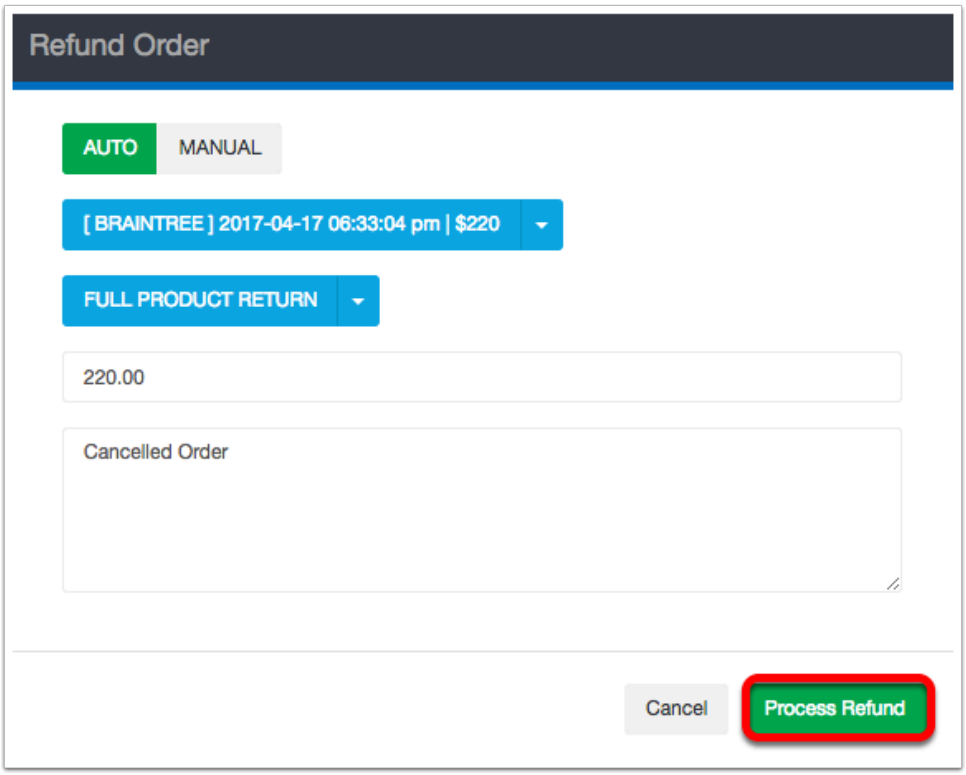
1. **Confirm the exact amount and order number** with the lab in question
2. **Find and select the order** in Command Center

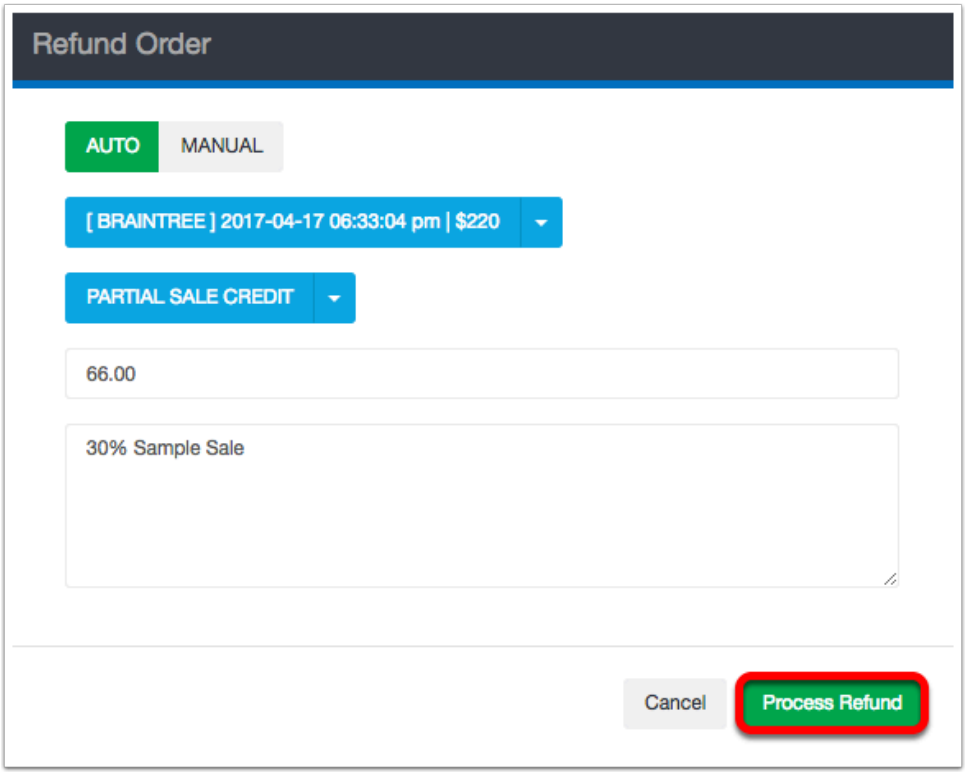


3. **Click the $ icon at the top right corner**. If that icon doesn't appear, it's because the charge was through Chargify.



4. **Input details.** This is an "Auto" refund. You'll choose the transaction and reason, and then enter the amount and reason. For example:



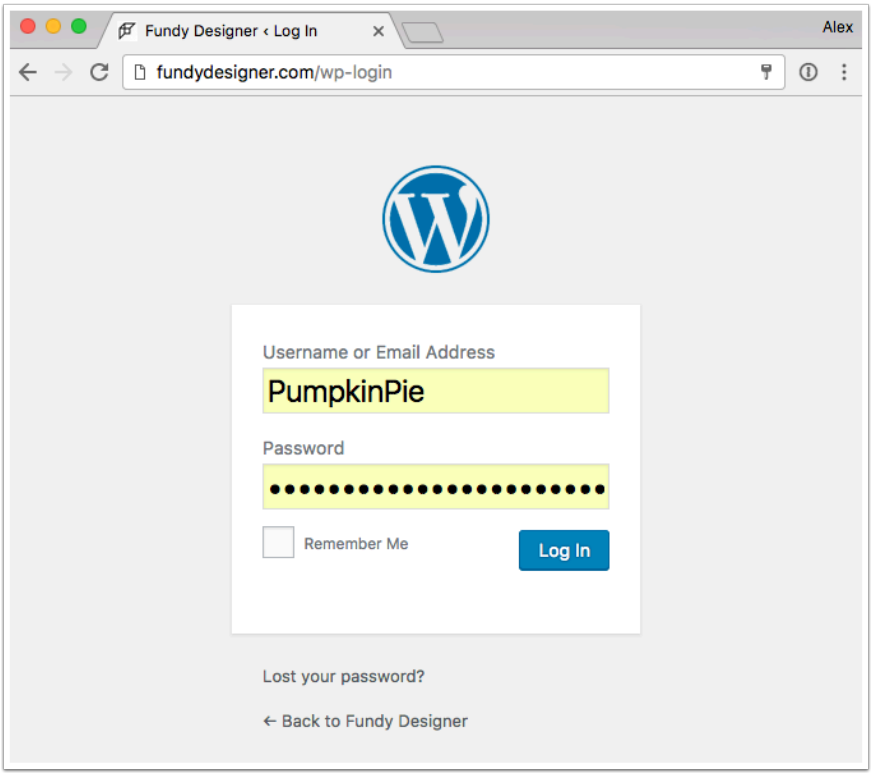


5. A green confirmation should appear and the status will change to "Refunded". **If a red "Error" appears**, the charge has not settled and you need to wait until the next business day to process the refund.

Updating Wordpress

The main Support page is hosted by Wordpress. To add a notice, update FAQ's, etc. you'll need to log in and edit the appropriate page.

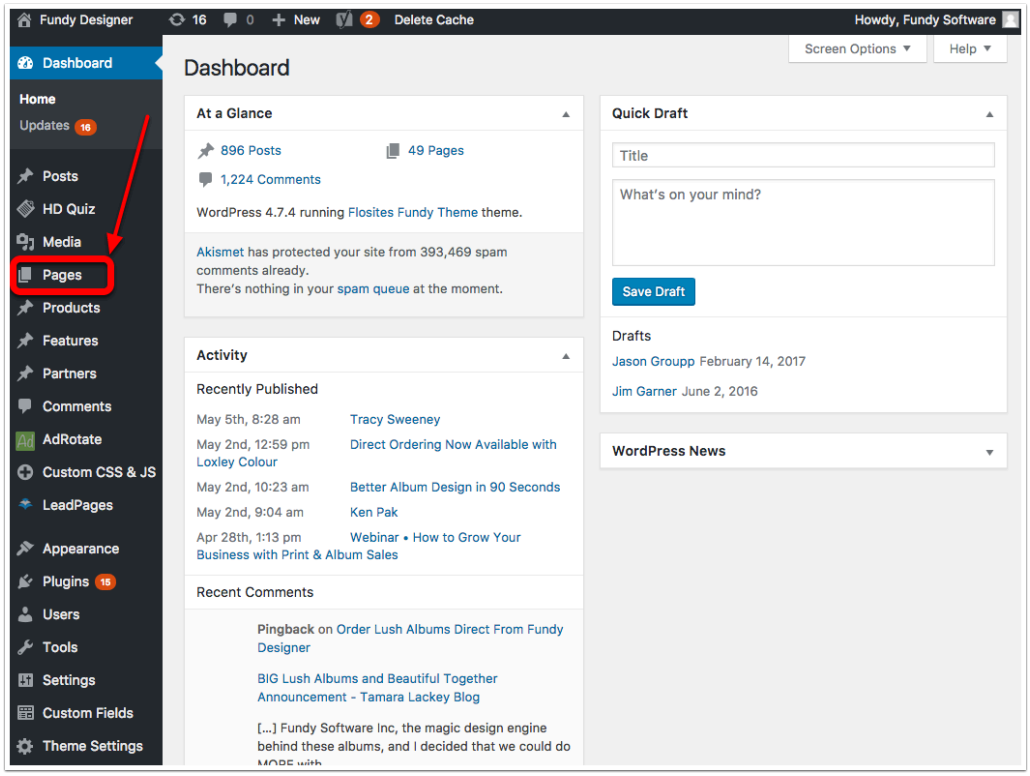
Login



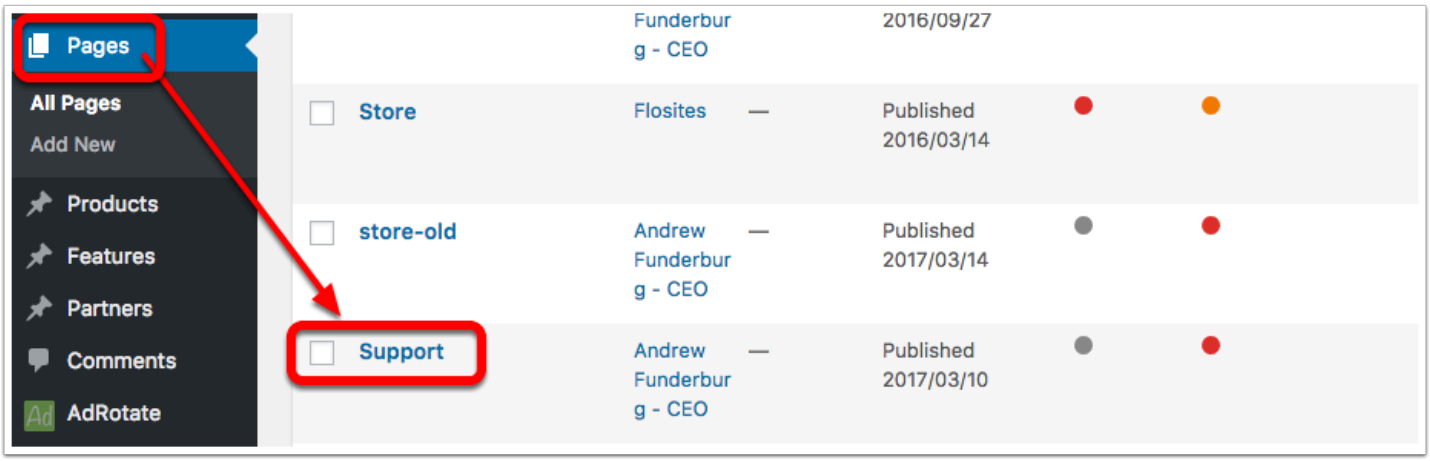
Access the Wordpress login information in 1password or Common Key. The site is:

fundydesigner.com/wp-admin

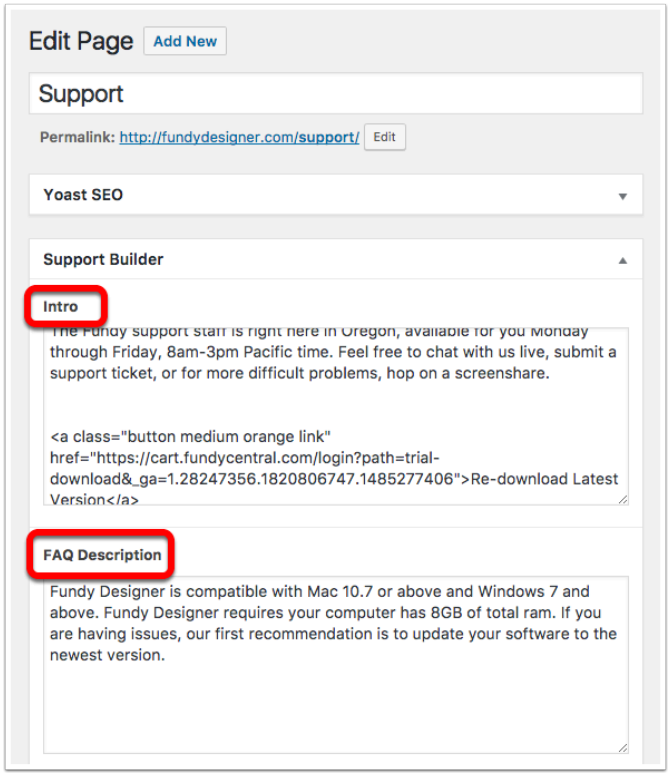
Pages



The Support site is a "Page". Everything else is Marketing so be careful!

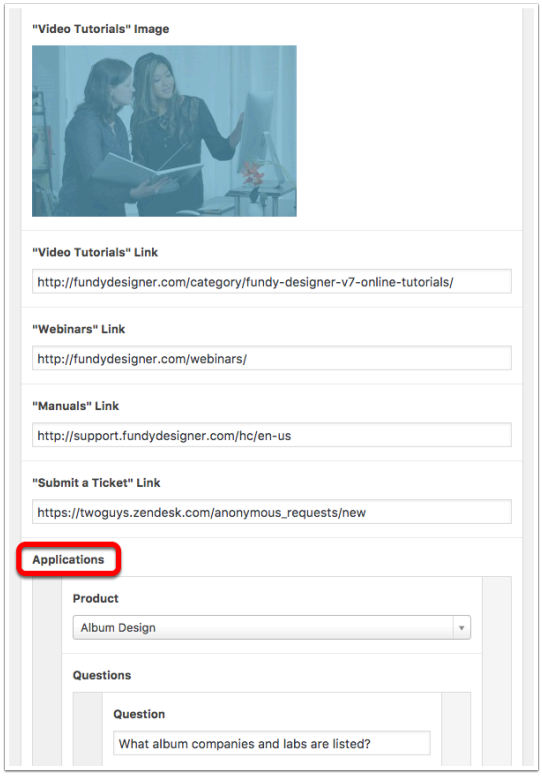


Items on Support Page



If necessary, a holiday or office closure notice would go in the Intro.

The FAQ should stay short and to the point.



Images and links won't be changed often.

Applications is where you'll find product specific FAQ- this is the most likely reason to access Wordpress.

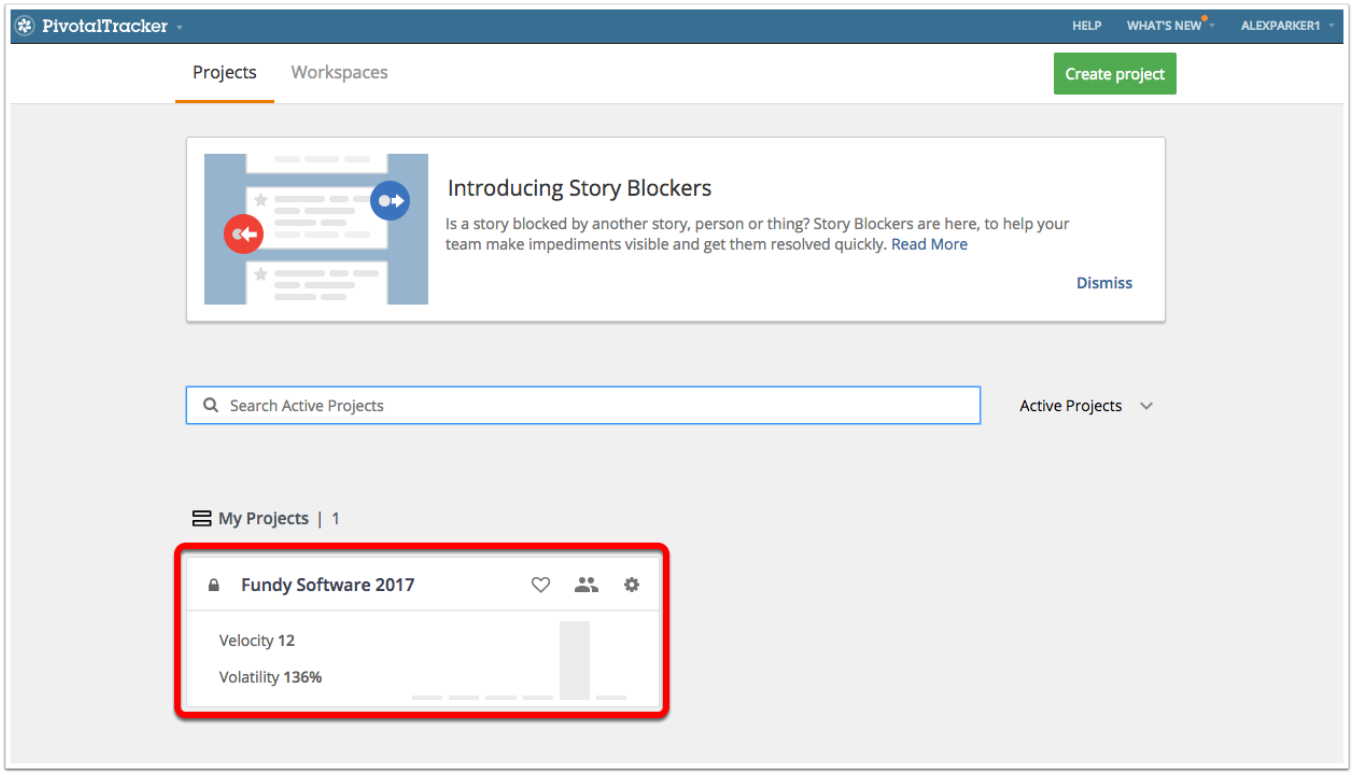
Use the drop down menu, question, or answer space to edit existing questions.

Use the "Add Question" button at the bottom to add a new one!

Logging Bugs and Feature Requests

Access the Project

There can be multiple active projects at a time when you log in to Pivotal. Make sure you're logging things in the correct project!

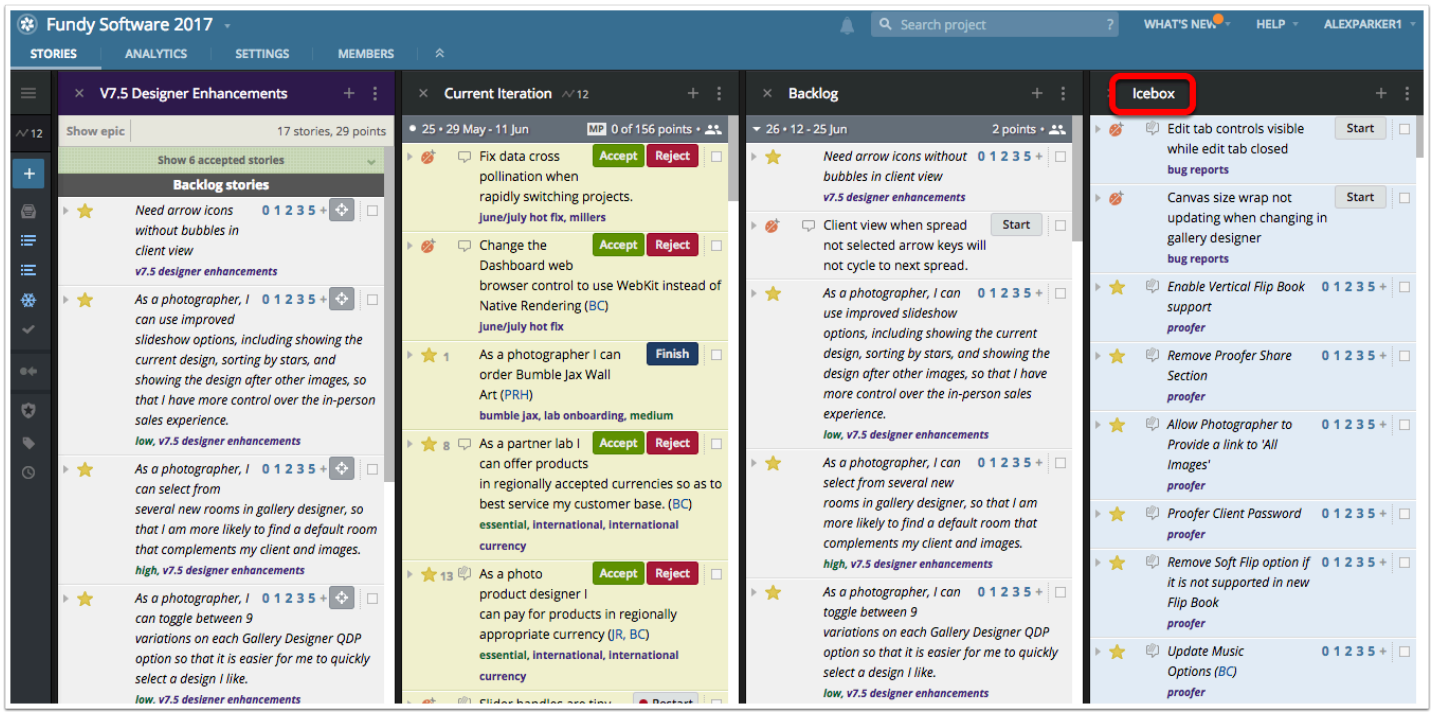


Where to log your item

Once you've logged in you can see different stories within the project.

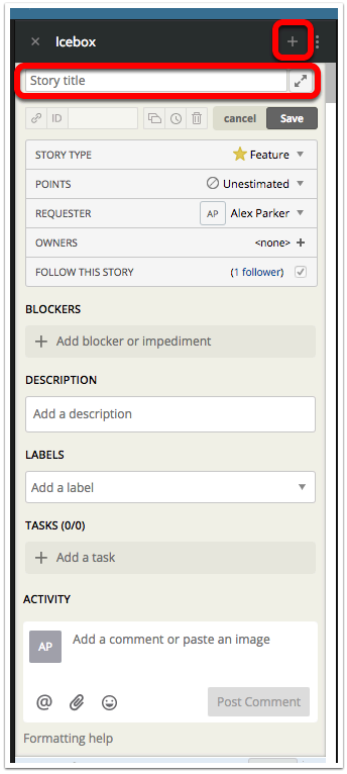
We log things in the **Icebox**

Everything else should be left to Development :)



Adding a Story

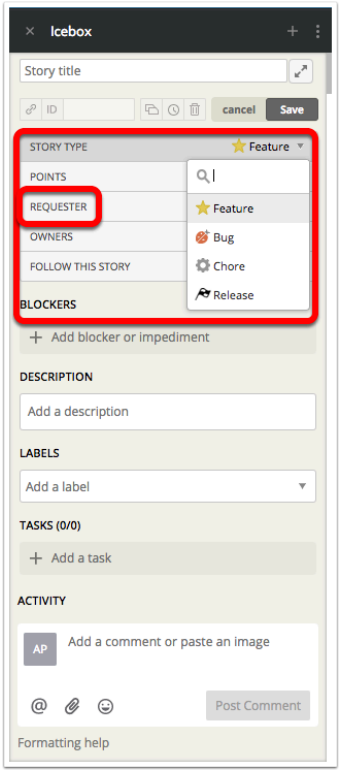
Feature Requests and Bugs are "Stories". Use the + to add a story, and give it a title.



Designate Story as a Feature Request or Bug Fix

You can also assign yourself as the Requester.

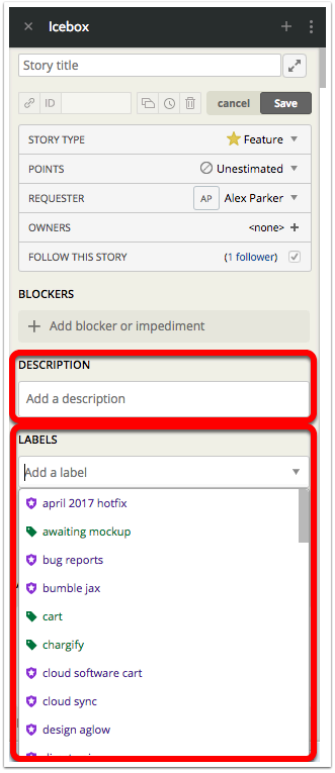
Don't worry about Points, Owners, or Following.



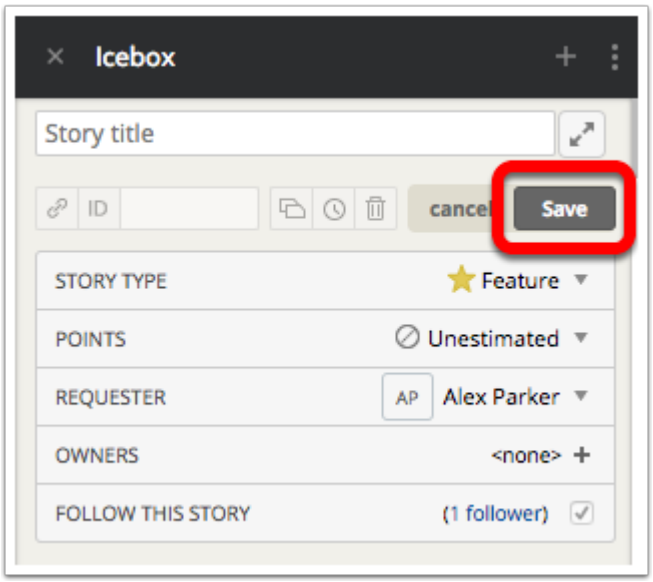
Describe the Addition

Add a description of the Feature Request, or steps to recreate a Bug

Label the Story. Use tags like "Low/Medium/High", "Proofer", etc.


Icebox
Story title
ID
cancel
Save
STORY TYPE
Feature
POINTS
Unestimated
REQUESTER
AP
Alex Parker
OWNERS
<none>
FOLLOW THIS STORY
(1 follower)
BLOCKERS
Add blocker or impediment
DESCRIPTION
Add a description
LABELS
Add a label
april 2017 hotfix
awaiting mockup
bug reports
bumble jax
cart
chargify
cloud software cart
cloud sync
design aglow

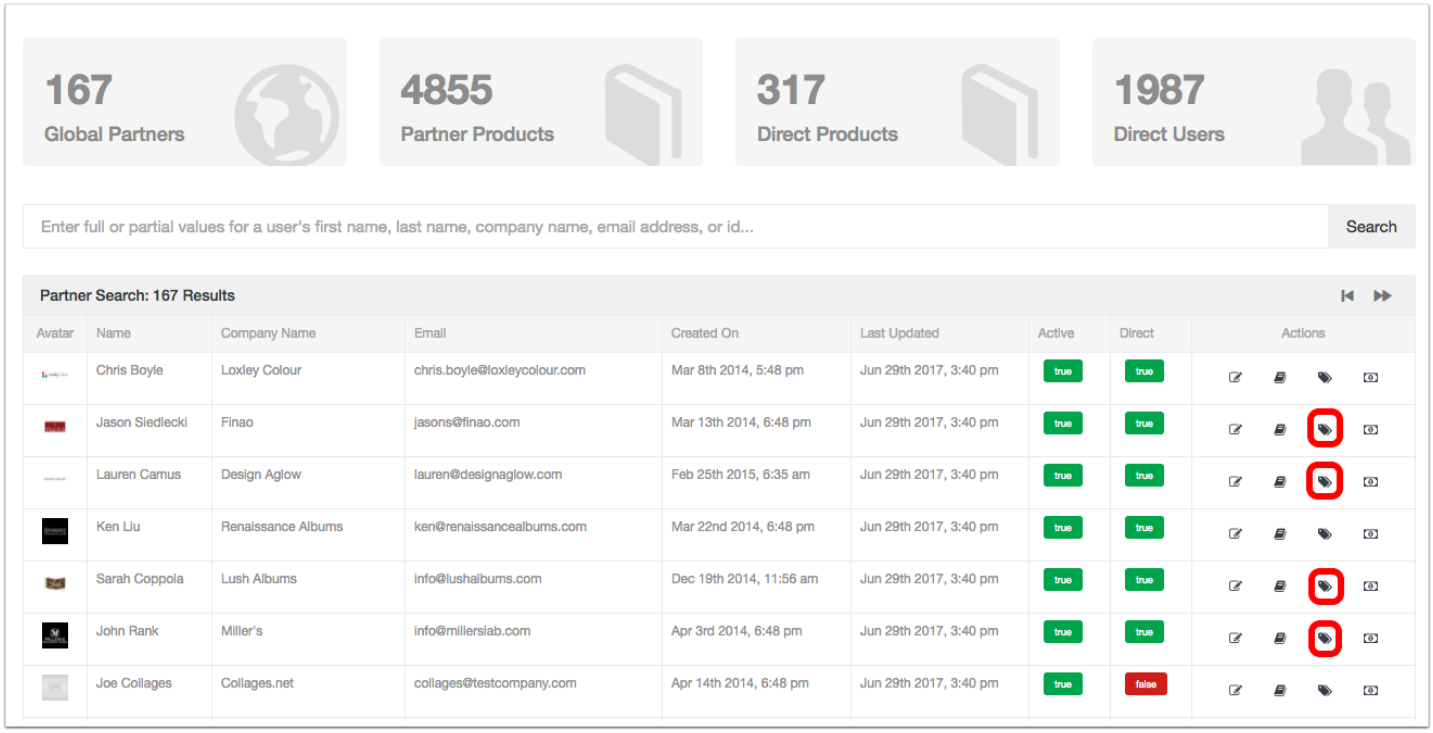
Save!


Icebox
Story title
ID
cancel
Save
STORY TYPE
Feature
POINTS
Unestimated
REQUESTER
AP
Alex Parker
OWNERS
<none>
FOLLOW THIS STORY
(1 follower)

Updating Direct Tracking Numbers

All Direct orders are sent to the lab under the "Fundy Direct" account, which allows us to access the statuses and receive email updates. These updates need to be put into Command Center manually for **Millers, Finao, Lush,** and **Design Aglow**

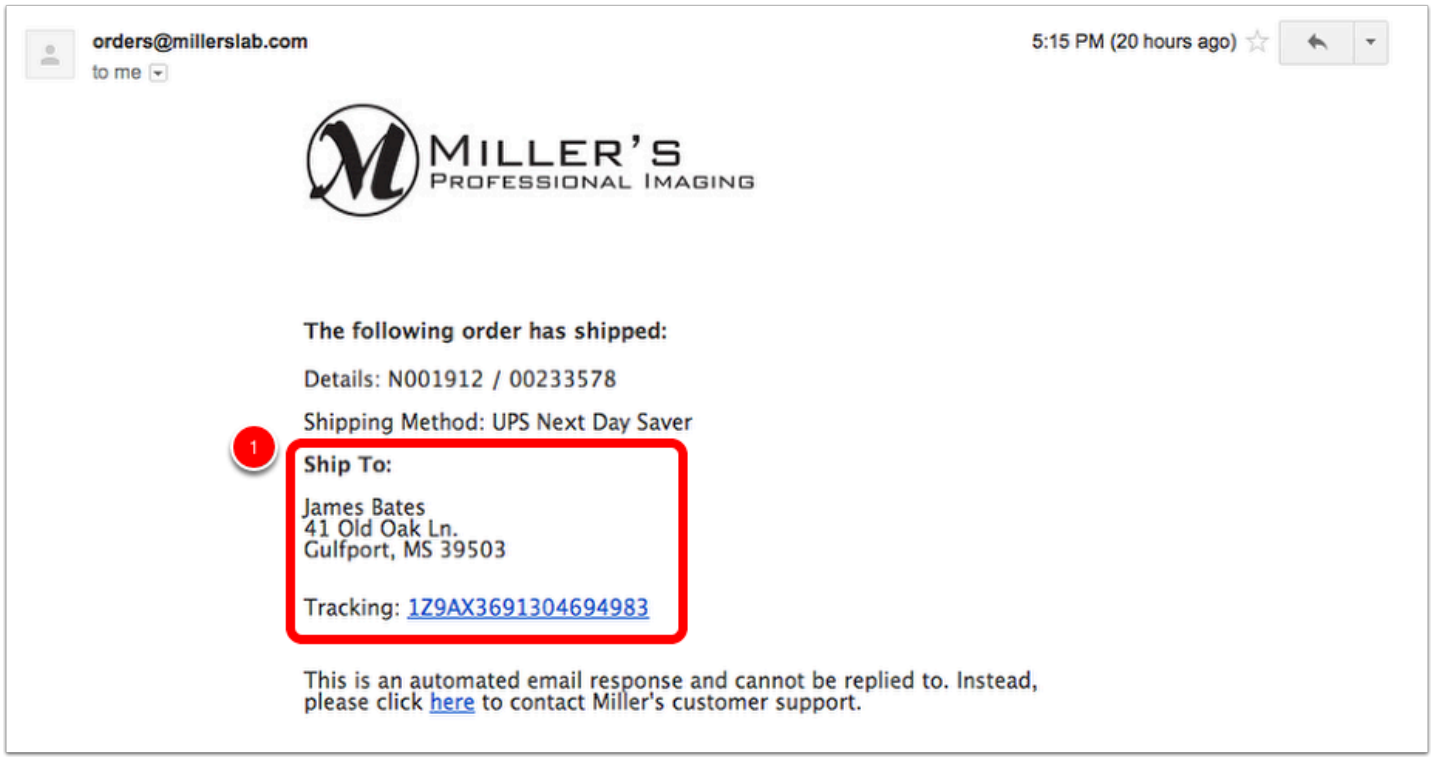
Use the icon of a price tag for the lab you're currently updating.



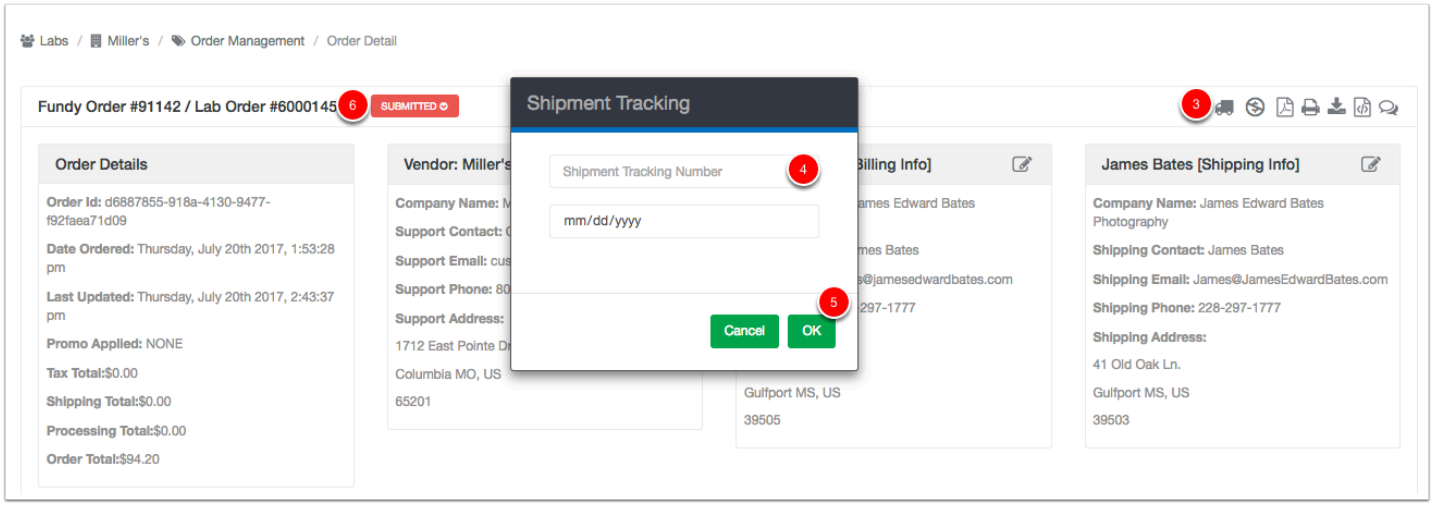
Miller's

The UPS tracking number for each customer is sent to **fundydirect@fundysoftware.com** and should be transferred to the order in Command Center.

It can be tricky if the shipping contact is not the same as the photographer who ordered the album, or if the photographer submitted multiple albums over a short period of time. In those circumstances, search for the shipping name in the "Project Name" and start with the oldest album ordered.



Payment Date	User Name	User Email	Fundy Order Id	Lab Order Id	Order Type	Last Updated	Status	Cost	Project Name
Jul 21st 2017, 1:33 pm	Elena Blair	elenasblair@gmail.com	91188	600014606	ALBUM	Jul 21st 2017, 1:36 pm	SUBMITTED	$62.60	Baby Austin
Jul 21st 2017, 12:50 pm	Anna Vickroy	anna@ultra-spective.com	91185	600014603	ALBUM	Jul 21st 2017, 12:56 pm	SUBMITTED	$48.10	RamosHP20170615
Jul 20th 2017, 2:38 pm	James Bates	James@JamesEdwardBates.com	91142	600014530	ALBUM	Jul 20th 2017, 2:43 pm	SUBMITTED	$94.20	GCCA 2017 12x8 Ray Wesson
Jul 20th 2017, 9:33 am	Caroline Talbot	caroline@carolinetalbotphoto.com	91124	600014507	ALBUM	Jul 20th 2017, 9:36 am	SUBMITTED	$219.50	Ashley B
Jul 20th 2017, 6:32 am	Caroline Talbot	caroline@carolinetalbotphoto.com	91111	600014487	ALBUM	Jul 20th 2017, 6:36 am	SUBMITTED	$210.00	Kerry
Jul 19th 2017, 11:51 pm	Darryl Felton	darfel1@mac.com	91098	600014480	ALBUM	Jul 19th 2017, 11:58 pm	SUBMITTED	$337.50	The Graduation of Ariana



1. Copy the tracking number from the email

2. Find the matching name in the lab's "Order Management" page. If you can't find it, try "Refunded".

3. Click the icon of a truck

4. Paste the tracking number (don't worry about the date)

5. OK to save

6. Change the order status from **Submitted** to **Shipped.** Miller's is fast enough that they won't be in a "Production" status.

Finao, Lush, and Design Aglow

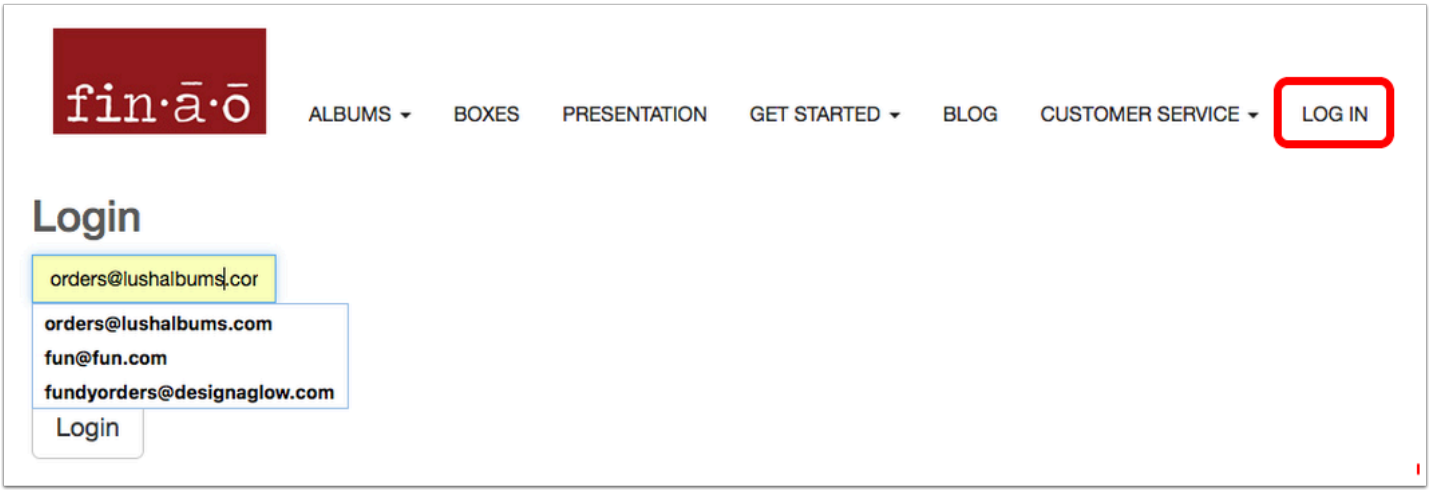
The process for these three labs is almost exactly the same as for Miller's. Instead of an email with a name, you will find the status and tracking number organized by order number at finao.com

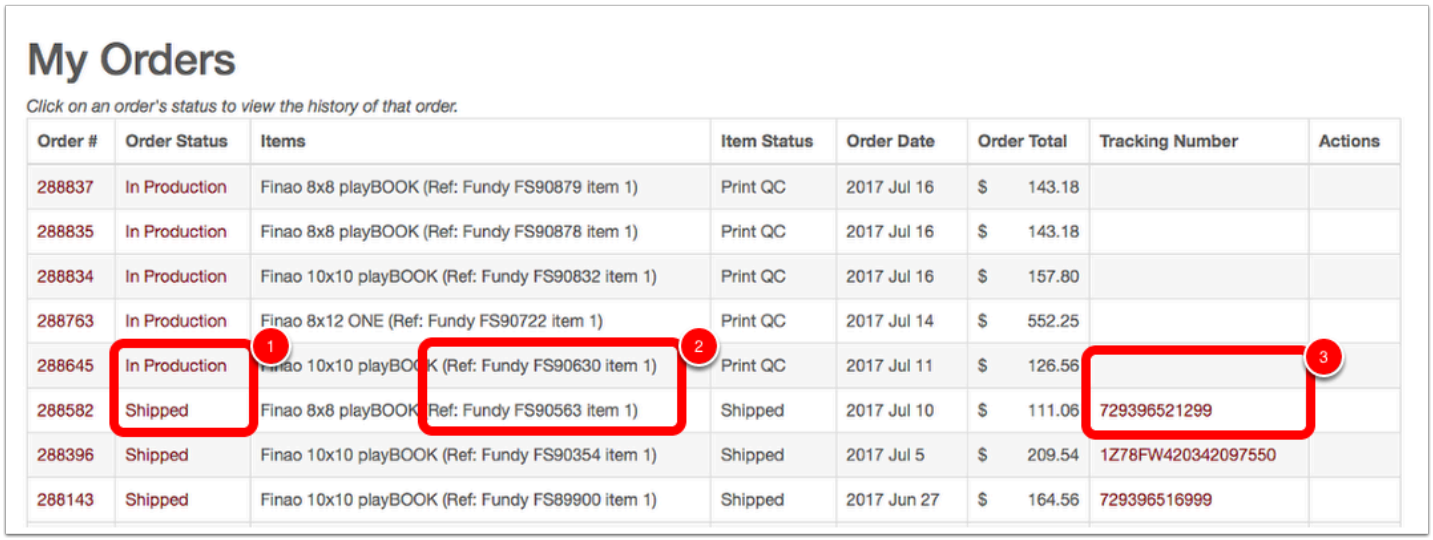
Finao prints for all three labs, you just have to log in with three different emails;

Finao: fun@fun.com

Lush: orders@lushalbums.com

Design Aglow: fundyorders@designaglow.com

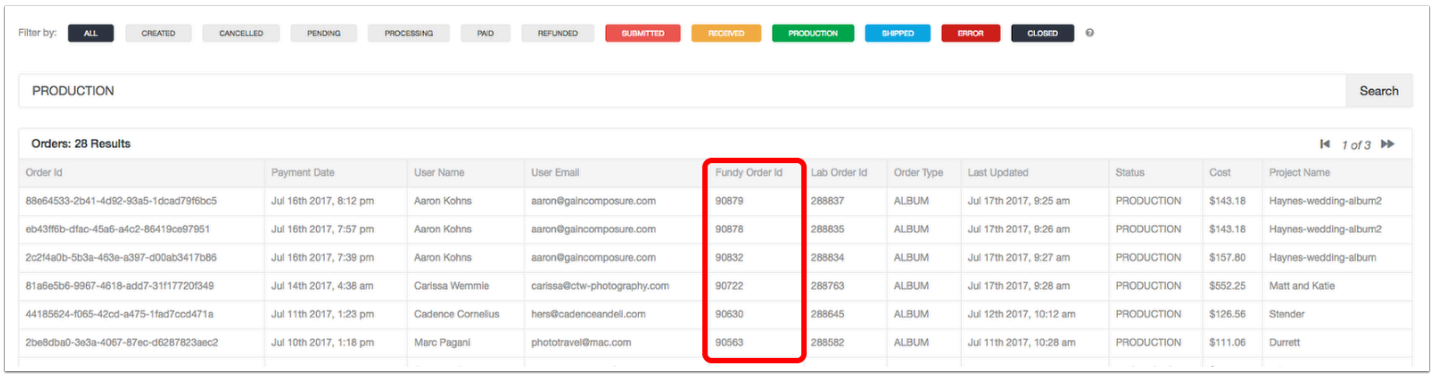




My Orders

Click on an order's status to view the history of that order.

Order #	Order Status	Items	Item Status	Order Date	Order Total	Tracking Number	Actions
288837	In Production	Finao 8x8 playBOOK (Ref: Fundy FS90879 item 1)	Print QC	2017 Jul 16	$ 143.18		
288835	In Production	Finao 8x8 playBOOK (Ref: Fundy FS90878 item 1)	Print QC	2017 Jul 16	$ 143.18		
288834	In Production	Finao 10x10 playBOOK (Ref: Fundy FS90832 item 1)	Print QC	2017 Jul 16	$ 157.80		
288763	In Production	Finao 8x12 ONE (Ref: Fundy FS90722 item 1)	Print QC	2017 Jul 14	$ 552.25		
288645	In Production	Finao 10x10 playBOOK (Ref: Fundy FS90630 item 1)	Print QC	2017 Jul 11	$ 126.56		
288582	Shipped	Finao 8x8 playBOOK (Ref: Fundy FS90563 item 1)	Shipped	2017 Jul 10	$ 111.06	729396521299	
288396	Shipped	Finao 10x10 playBOOK (Ref: Fundy FS90354 item 1)	Shipped	2017 Jul 5	$ 209.54	1Z78FW420342097550	
288143	Shipped	Finao 10x10 playBOOK (Ref: Fundy FS89900 item 1)	Shipped	2017 Jun 27	$ 164.56	729396516999	



Filter by: ALL CREATED CANCELLED PENDING PROCESSING PAID REFUNDED SUBMITTED RECEIVED PRODUCTION SHIPPED ERROR CLOSED

PRODUCTION Search

Orders: 28 Results 1 of 3

Order Id	Payment Date	User Name	User Email	Fundy Order Id	Lab Order Id	Order Type	Last Updated	Status	Cost	Project Name
88e64533-2b41-4d92-93a5-1dcad79f6bc5	Jul 16th 2017, 8:12 pm	Aaron Kohns	aaron@gaincomposure.com	90879	288837	ALBUM	Jul 17th 2017, 9:25 am	PRODUCTION	$143.18	Haynes-wedding-album2
eb43ff6b-dfac-45a6-a4c2-86419ce97951	Jul 16th 2017, 7:57 pm	Aaron Kohns	aaron@gaincomposure.com	90878	288835	ALBUM	Jul 17th 2017, 9:26 am	PRODUCTION	$143.18	Haynes-wedding-album2
2c2f4a0b-5b3a-463e-a397-d00ab3417b86	Jul 16th 2017, 7:39 pm	Aaron Kohns	aaron@gaincomposure.com	90832	288834	ALBUM	Jul 17th 2017, 9:27 am	PRODUCTION	$157.80	Haynes-wedding-album
81a6e5b6-9967-4618-add7-31f17720f349	Jul 14th 2017, 4:38 am	Carissa Wemmie	carissa@ctw-photography.com	90722	288763	ALBUM	Jul 17th 2017, 9:28 am	PRODUCTION	$552.25	Matt and Katie
44185624-f065-42cd-a475-1fad7ccd471a	Jul 11th 2017, 1:23 pm	Cadence Cornelius	hers@cadenceandeil.com	90630	288645	ALBUM	Jul 12th 2017, 10:12 am	PRODUCTION	$126.56	Stender
2be8dba0-3e3a-4067-87ec-d6287823aec2	Jul 10th 2017, 1:18 pm	Marc Pagani	phototravel@mac.com	90563	288582	ALBUM	Jul 11th 2017, 10:28 am	PRODUCTION	$111.06	Durrett

1. The status of each album will be shown and should be updated in Command Center to match

2. Use the "Fundy Reference Number" to find the order in Command Center

3. If a tracking number is available it will be there!

Other Labs

Renaissance updates orders themselves, but fundydirect@fundysoftware.com still receives shipping updates.

Application Database

You'll hear the term "App Database" a lot in Support. So, what is an App Database? Well, every application on your computer has a corresponding database that tracks the background history of your application. This is a lot like your internet browser history. It is super helpful if you need to backtrack to see sites you've been to, but after a while of not clearing your history, it can cause browser slowness or other adverse issues. The same thing happens with your Fundy Software app database. In order to correct this, you can do a simple reset.

How to reset an app database in:

MAC:

- Make sure your Fundy Designer application is closed
- Open Finder
- Go to "Go" in the menu bar
- Hold down the option key so the Library Option appears
- Click on Library (you can let go of the option key now)
- Click Application Support
- Click Fundy Software
- Click Fundy Designer
- Change the name of the Data Folder to DataOLD
- You have now reset the App Database

WINDOWS:

- Click your Start menu
- Click your User Name (most commonly in the upper right-hand corner)
- Click AppData (if you do not see this folder, follow this link http://windows.microsoft.com/en-us/windows/show-hidden-files for details on how to "unhide" it. note, you will want to hide your folders again after this process so you don't accidentaly change anything at a later date)
- Click Roaming
- Select the FundySoftware folder and rename it FundySoftwareOLD
- You have now reset the App Database

You probably should avoid deleting an app database, but if you see one that was reset over a few months previous, it is safe to delete the old database.

Command Center

This article will review Command Center and how best to use it to help customers, apply licenses, and utilize analytics.

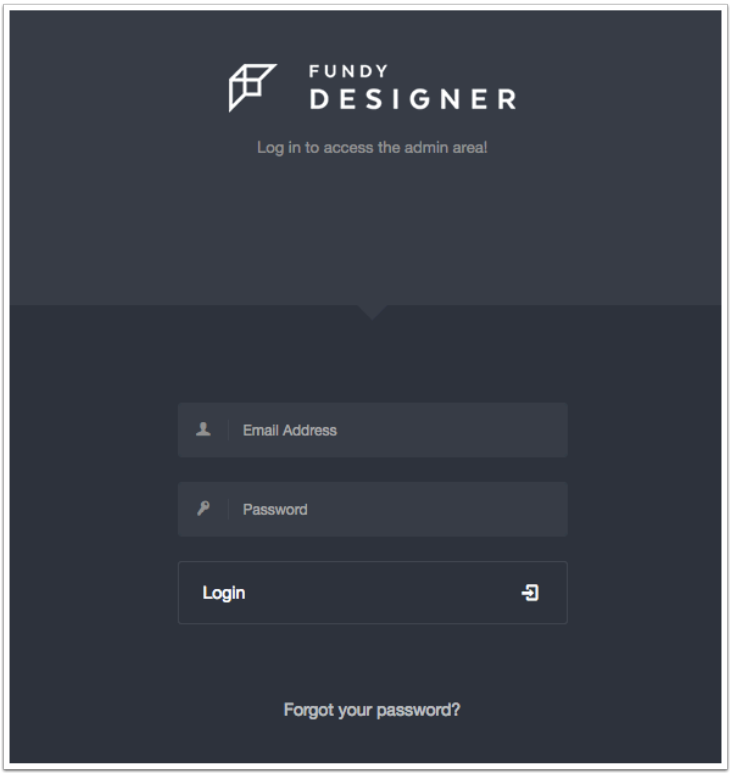
What is Command Center? It is an in-house developed dashboard where all of our customer information is housed. There are three Command Center databases:

1. **https://ccpro.fundycentral.com**
This is the database you will use most often, as it is correlated to the desktop application that customers use. Whenever a customer makes a purchase, the purchase is reflected in this database, most commonly referred to as Production or PRO.

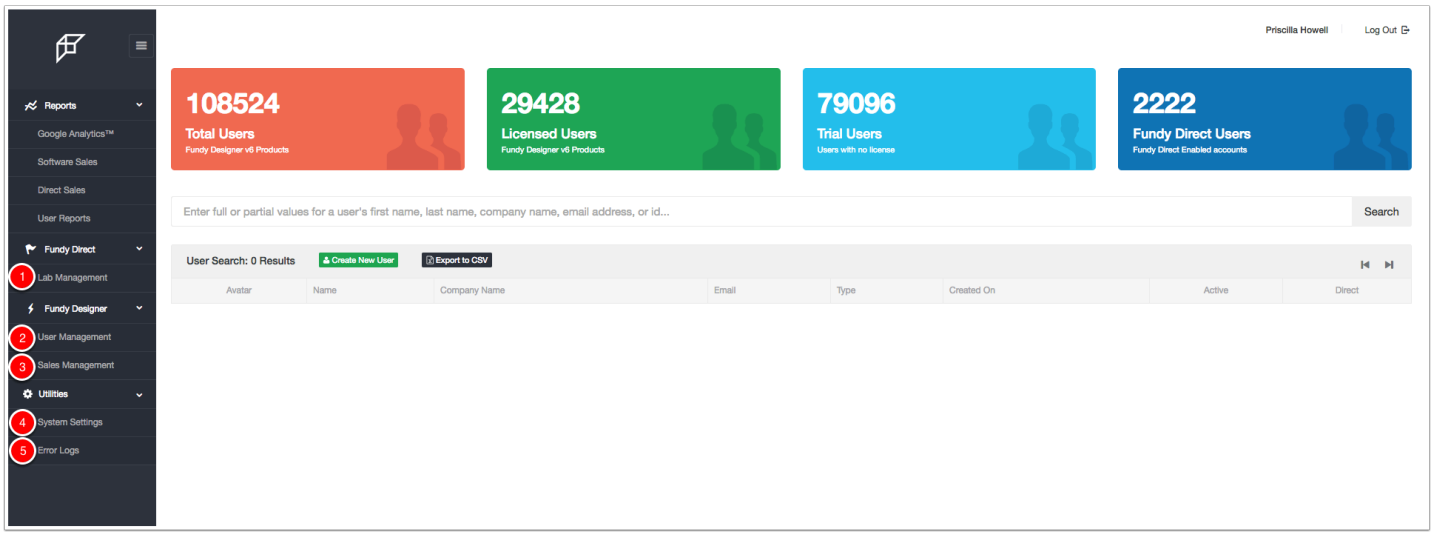
2. **https://cctest.fundycentral.com**
This database, most commonly referred to as TEST, is used for internal and external testing. Labs will download the test build of our software to verify that their specs are presenting correctly. Sometimes our beta build is connected to this database. This database is primarily used by the support and development teams.

3. **https://ccdev.fundycentral.com**
This database, referred to as DEV, is considered to be a "sandbox". A **sandbox** is a **testing** environment that isolates untested code changes and outright experimentation from the production environment or repository, in the context of **software development** including Web **development** and revision control. The development server is primarily used by the development team.

First, let's log into Command Center:



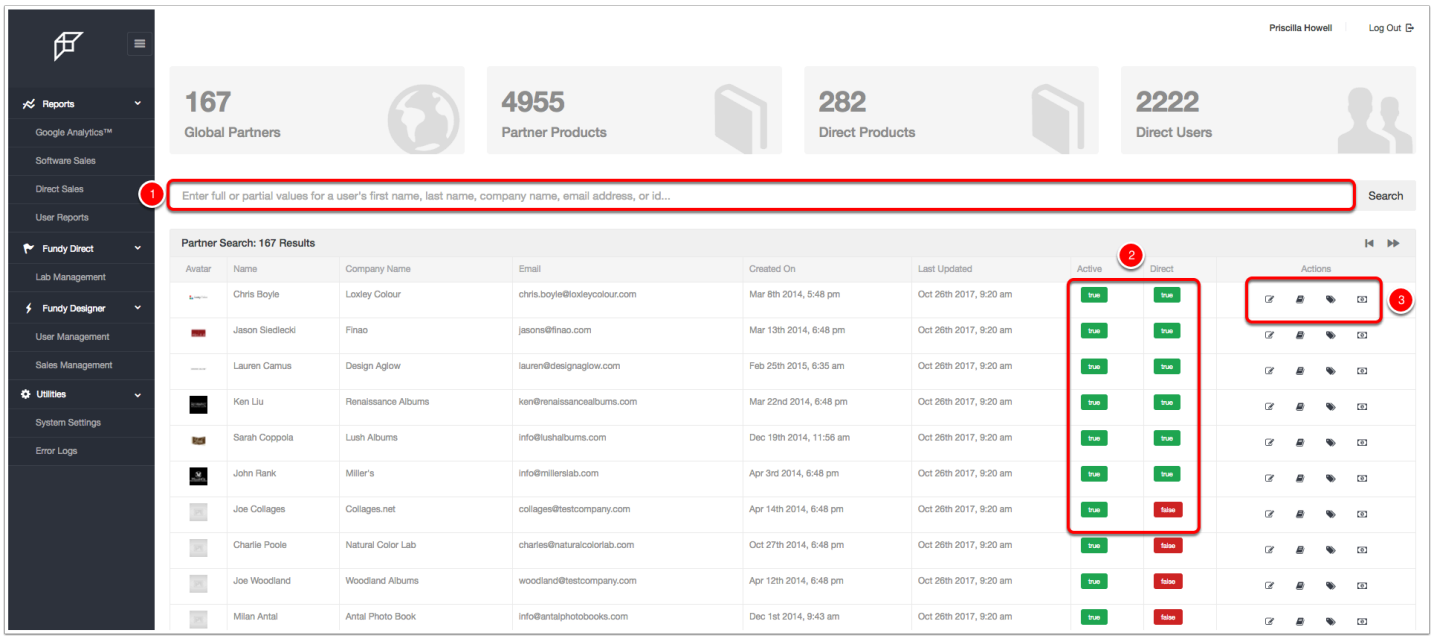
You will need to enter your email and the password used to set up your account. Once you log in, you can change your password, if necessary. First, we will review the most used links in CC. Once logged in, you can view the dashboard:



1. Lab Management: Click here to manage Lab information, specs, promotions and accounting.
2. User Management: This is the most utilized section of Command Center, as this is how clients accounts are managed locally.
3. Sales Management: Most utilized by the markteting team, this is where the pricing for our site is referenced.
4. System Settings: This is managed by the dev and operations teams. This is wehre the download links listed on the site are located.
5. Error Logs: If you want to view user crashes for reporting, you will find them here.

Let's review these links in more detail.

LAB MANAGEMENT



Labs are listed in this view with the Fundy Direct labs listed first, and after that, in alphabetical order.

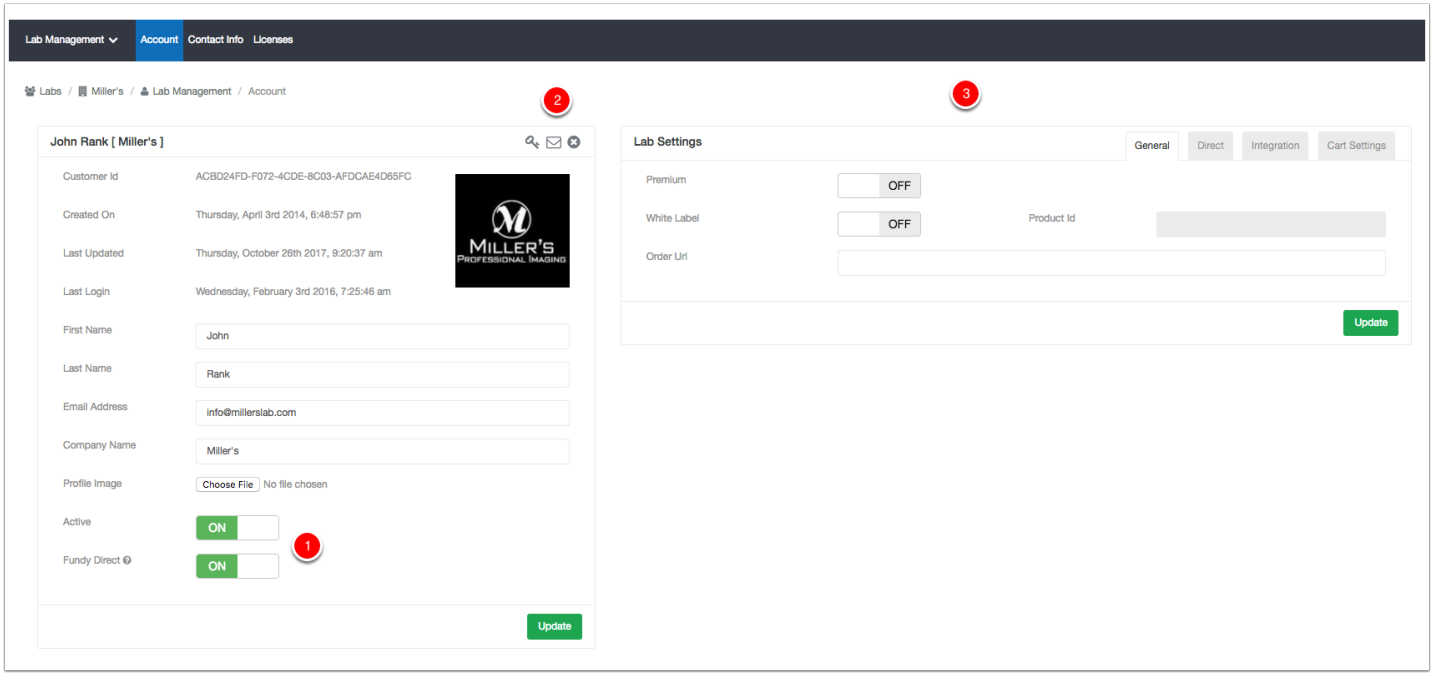
1. If you know which lab you are looking for, you can search for that lab using the search bar.
2. You can see if a lab is a Direct lab and/an active lab in this column.
3. The actions column contains 4 icons.

a. The pencil/notepad icon will take you to the main lab information page. This page allows you to change the lab name, email, status, etc.

b. The book icon takes you to the lab sizes and offerings. You can edit album sizes, names, etc.

c. The price tag icon takes you to the accounting tab for the lab. Here you can view all uploaded, pending and submitted orders, as well as process remittances and other accounting functions.

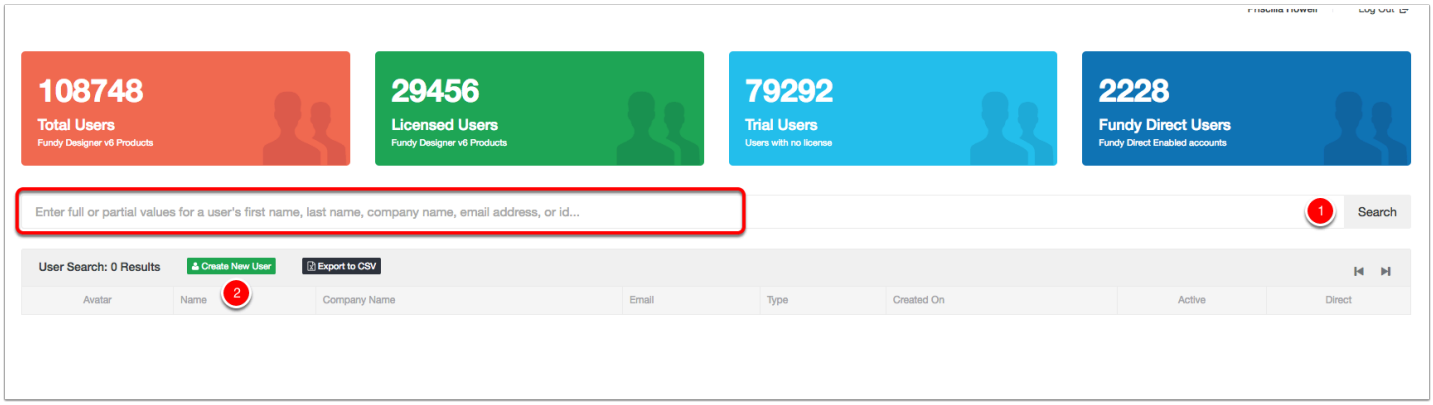
d. The dollar icon takes you to the lab promotion page. This only applies to Direct labs and discounts the orders processed through Fundy Direct, but automatically applies the promotion to the client's order.



Above, you can see the lab information page. As this example indicates, Millers lab is an active Direct lab.

1. You can toggle the lab on and off here.
2. You can click the key icon to change the password for this account, click the envelope icon to send an email to the email on file with instructions to change the password, or click the X to delete the account (but don't delete the account).
3. The lab settings panel is mostly utilized by development and data management. It is not recommended that you utilize this area without specific instruction.

USER MANAGEMENT



Enter the customer's name or email in the search box and click search. Sometimes, you may need to try a couple searches before you