

Order Details

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Creating an Order or Invoice

To create a manual order or invoice, click on the green “New Order” button. You will be prompted to provide the following information:

- Customer: Select an existing contact or create a new one
- Order Status - Select from Approved, Cancelled, Complete, Delivered, Draft, In Progress, Ordered, Packing, Pending Approval, Picking, or Shipped.
- Date Ordered
- Order Items (see below)
- Option to automatically record this order as income in the Accounting section
- Payment Status - select from Cancelled, Due, or Paid
- PO Number for your internal tracking
- Payment Method
- Delivery Type- Choose from Delivery, Pick up, or Shipped
- Delivery Date
- Customer Message: Add an note that you'd like included on the invoice

Once you've completed this dialog, simply press “Save” to create the order.

Invoices will automatically include your farm name and address that you've specified in Your Account Settings

Note: Online orders automatically record the sale as income in the Accounting section.

Adding Order Items

You'll need to add one or more products to an order. To add a product, select it from the drop down menu under “Add Order Item”, then enter the number of products being sold in the “Quantity” field and click “Add Item”.

Products included in the order will be listed and can be removed by clicking on the red “X”. Additionally the total for all the adding products is automatically calculated.

Managing Existing Orders

When you select an existing order from the orders grid or from a Customer's Orders Tab you can view details about the order. Details include:

- The date the order was placed
- The products, price, and quantity sold
- The customer details
- Order total

- Order status (including the transaction ID if an online credit card payment)
- Ability to edit the order
- Print packing slip button

Printing and Emailing Invoices

Printing an invoice is an easy and convenient way either include a receipt and inventory record when delivering or products or to help you fulfill the order when packing a box with products or produce, simply click the "Print" link at the top right of the order details screen.

If you've attached a customer to your order / invoice, and that customer has an email address you can email them. To email the customer, simply click the "Email Customer" button in the bottom right and your customer will receive an email with the invoice included.
