



Manually creating a new order

Syeda Khadija Phool - 2023-11-14 - Orders

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Manually creating an order is a rare case that occurs in the drop shipping business. 99% of the time, the order is placed through the website/online store by the customer. However, if you ever have to place an order on behalf of a customer from the backend of your Cartzy store, explained below is the process to do so.

Navigate to the **path: Orders > All Orders > Create Order**. The **Create Order** page will be opened as shown in the image below.



On the **Create Order** page, the following sections are available for you to add the details of the orders as well as to configure the total price and payment status.

1. Customer details
2. Products
3. Discounts & Shipping fee
4. Notes & Tags
5. Payment status

Add customer's details

Using the search bar given in the **Find Customer** section, you can search for the customer by customer name or email. If the customer is already registered in your store, their name will appear in the search results list from where you can select the customer's record.

As soon as you select the **customer**, their **contact details**, **shipping address**, and **billing address** will be populated as demonstrated in the image below.

Notes:

- If the customer is not registered on your store, they will not appear in the search results list. In this case, you will need to first register/add the customer on/to your store respectively.
- If you selected the wrong customer mistakenly, you can click on the Remove link to remove the customer from the order and search for the target customer again in the search bar.



Adding products

Under the **Add Products** section, you can add the requested products to the order by following these steps:

1. Search for the products by using the search bar or by clicking the **Browse Products** button. In both cases, the **Select Products** popup will appear.
2. In the **Select Products** popup, you can search the wanted products by name or product code.
3. Once the searched products are sorted, click the **checkbox(es)** to select the wanted **product(s)** from the list.
4. Click **Done**.



5. The selected product(s) will be added to the order as shown in the image below. The **Total price** will be updated to display the price of the **product(s)**. You can

further apply discounts and apply shipping fees as explained in the next section.



Notes:

- If you selected a product that was out of stock, then the product will be added to the order with the label "**Out of Stock.**" It will help you restock the product inventory before confirming the order placement.
- To remove a product from the order, click the bin icon next to the product name.



Discounts and Shipping Fee

Once you add the wanted product(s) to the order, you can apply the discounts and shipping fee to the order amount. These charges will be reflected in the Total price as well.

Discount

1. To give a discount to the customer on the added product(s), click on the **Add Discount** link. On the Add **Discount** popup, enter the discount amount (in digits only). For example, if you want to sell a product with \$10 off its original price, you will enter "10" in the field.
2. Also, type in the reason for the discount in the **Reason** field. For example, loyalty discounts, **Christmas** offers, etc.
3. Click **Apply**, and the added discount will be applied to the price of the **product(s)**. The discounted price will be reflected in the **Subtotal**, as well as in the Total price.

Shipping Fee

1. To apply shipping charges or to define if the shipping is free, click the link "**Add Shipping.**"
2. On the **Add Shipping** popup, the **Free Shipping** option will be checked by default. You can click **Apply** to confirm the free shipping of the added products.

3. The **Free Shipping** label will appear as illustrated in the image below. In this case, the Total price will be equal to the **Subtotal**.



The image below shows the two orders placed for the same item with and without discount.



Discounts and shipping charges can only be applied at the time of order creation. Once the order is created, you cannot apply any discount or shipping fees to the order in edit mode.

Notes and Tags

Notes

In the **Notes** section, you, as an admin/support rep/sales rep, can add the notes or additional instructions for the order that you are placing on behalf of the customer. For example, they don't want the order to be delivered before a certain date or so.

Tags

Tags help in the search of a record or define the status of a record. You can add your tags as per your requirements. For example, you want to remember that the person has been contacted already, or you can add the tag of the product name.



Create Order | Payment Status

Once you have added all the information required to create an order on behalf of your customer, you can proceed to the payment section "**Accept Payment.**"



If you have not received the payment, and you want to simply click on the **Create Order** button given at the top right corner of the page, even then you will have to define the

payment status of the order.

In short, defining the payment status of the order is a mandatory step for creating an order. Hence, whichever of the following buttons you click, the **Create Order** popup will appear asking for the payment status.

1. **Create Order**: Clicking this button will also take you to the steps where you have to define the payment status and payment medium as explained below.
2. **Mark as Paid**: In this case, the **Accept Payment** field will be pre-populated with the “**Mark as Paid**” option. If the customer has already paid the price for the ordered products, you can select this option.
3. **Mark as Pending**: In this case, the **Accept Payment** field will be pre-populated with the “**Mark as Pending**” option. This option will be selected if the customer has not paid the amount of the ordered products.

Type of Payment Expected:

Currently, Cartzy supports payment only through **Stripe**, that’s why only the option of **Stripe** will be available.

Once you have selected the appropriate payment status, click **Create Order** on the **Create Order** popup.



Order Created

Upon clicking the **Create Order** button, the following will occur:

1. The order will be created successfully.
2. A notification of success will appear at the top right corner of page.
3. The page will be refreshed to open the page of **Orders**. The newly created order will be listed at the top.



☐ All the newly created orders will have the fulfillment status as “**Unfulfilled**” as the order fulfillment is done manually in the dropshipping business that you are running through the **Cartzy** store.

Paid order

An order that was created with the payment status “**Payment Paid**” will be listed on the main **Orders** page, as demonstrated in the image above.

Order with payment pending

When the order is created with the payment status “**Payment Pending**”, the order is not listed on the main **Orders** page. Such an order will appear on the customer’s details page as demonstrated in the image below.

