Standing Orders Overview

Overview

Standing orders are recurring orders created by your customers. On your website, the function will be available only to Users who can order on account, e.g., Customer Users. However, your Customer may only want specific team members to be able to create a standing order, e.g., those responsible for reordering regularly used items. The creator of the standing order is the default 'Owner' of the standing order (but ownership can be changed). In addition, one or more Standing Order Users can be nominated to be Standing Order Administrators. When a standing order is created, it is selected as either : 'personal' or 'shared'. 'Personal' orders can only be edited, paused and deleted by the Owner and Standing Order Administrators. All other Standing Order Users can only view the order details. 'Shared' orders can be edited, paused and deleted by all Users with access to Standing Orders.

When Standing Orders was enabled for the Customer, your Administrator(s) will have configured settings that determine the following:

- which Customers, Users and/or Roles have access to Standing Orders,
- if a recurrence of a standing order that has been re-priced or adjusted will be processed when the order amount now exceeds the User or Customer budget,
- if and when (how many days before) Standing Order Owners are notified of a Standing Order nearing expiration
- if and when (how many days before) Standing Order Owners are notified of a recurring order due to be processed soon,
- which internal team member(s) receives notifications about your customers' standing orders.

Standing Orders and Order Approvals: If the Order Approvals feature is enabled for the Customer User, their Standing Order will be subject to the usual approval steps and processes if the order total exceeds budget, e.g., approver selection during order creation, approval request notification sent to approver, etc. The Standing Order will not be active until it has been approved.

Useful Standing Order Terms and Definitions

> ⓘ **Standing orders terms and definitions**
>
> - '**shared**' or '**personal**' standing order type: The type is set during the creation of the standing order. (**NOTE -** the type can be changed by Users who have editing rights to the standing order.)
>   - **Shared**: a shared standing order can be viewed, edited and deleted by all other Customer Users with access to the Standing Orders feature.
>   - **Personal:** a personal standing order can be viewed by all Users who have access to the Standing Orders feature. But only the creator (or current owner) and standing order administrators can edit and delete this type.
>
> - Standing Order **Owner**: by default, the Owner is the User who created the standing order. However, ownership can be changed by the creator or standing order administrators at a future date. When ownership has been changed, notification emails are sent to the old and new owners.
>
> - Standing Order **Administrator**: these administrators are Customer Users who can view, edit and delete all standing orders in their Customer account.

How Standing Orders work for your customers

Note - *Standing order messaging, including text on buttons, are customisable by your Administrator. Therefore the text you see in the Standing Orders screen may differ in places from what is detailed here.*

1. In the Cart, there will be a button option the User selects to save the order as a Standing Order instead of going through the usual checkout procedure. (**NOTE -** This button will not be displayed for Users who have not been given access to the Standing Orders feature.)

NEXT

1	2	3	4
Cart	Address & Delivery	Payment	Confirmation

🛒 Shopping Cart
Please review your cart before checkout.

CHANGE ACCOUNT | SAVE AS TEMPLATE | ⊘ CREATE STANDING ORDER | II HOLD ORDER | ⤤ EXPORT TO CSV | 🗑 REMOVE ALL | ⟳ UPDATE ORDER   🖨 PRINT | CONTINUE TO CHECKOUT ▶

≡+ Fast Order Entry ❓

Product	Qty	Your Notes	
Enter product code	− [ ] +	Your Notes	⊕ ADD TO CART

Product	Qty	Price (ex GST)	GST	Total (ex GST)
Brother ScanNCut Universal Pen Holder Code: 2557614 Each ✅ Shipped from Supplier Delivery Times Vary Notes ❓ Add Product Note	− 5 + ☆ Add to favourites ⟳ Update ⊗ Remove	$25.91	$19.43	$129.55

2. The User is taken to the **Standing Order** form, where they enter fulfilment details, e.g., address, order comments, etc. To progress to the next step, they click the **Standing Order Review** button.

🕐 Standing Order
Please review your Standing Order details before submitting.

🚚 Delivery Details

Customer Reference *
12346

Please enter your business name and delivery address below. Please note we do not deliver to PO Box *
PA ARCHITECTS LTD

Building/Level/Department

5 SMITH STREET

Suburb

DUNEDIN

Post Code *
9014

Delivery Instructions (i.e. Department, Contact Name). Please also include a mobile number for contact should there be any issues at the point of delivery. Note: the delivery address cannot be changed by filling this field.

Delivery Instructions (i.e. Department, Contact Name). Please also include a mobile number for contact should there be any issues at the point of delivery. Note: the delivery address cannot be changed by filling this field.

Send Order Confirmation To Another Email Address
sarahl3.testing@gmail.com

◀ RETURN TO CART   STANDING ORDER REVIEW ▶

3. In the 'Standing Order' review page, the User can check the delivery information they just entered, and edit them if required. If Order Approvals is active for the User and the order amount will exceed their budget limit, the approver selection step is included. When the User is satisfied with their order details, they click the **Schedule Standing Order** button to move on to setting the schedule for order recurrence.

🕐 Standing Order
Please review your Standing Order details before submitting.

QUICK VIEW | EDIT

Subtotal (ex GST)	$142.48
Plus GST	$21.37
Total (inc GST)	**$163.85**

🚚 Delivery Address

EDIT

Customer Reference   SO_12350
Address   PA ARCHITECTS LTD
                        5 SMITH STREET
                        AUCKLAND
                        9014

Appears only if the Order Approvals feature is active

👥 Select Approver

Select Single Approver
Please Select .. ▼

4. In the 'Schedule Standing Order' screen, the User enters information about the order recurrence.

Schedule Standing Order

Standing Order Name: meaningful name for the standing order
CC Users: email addresses of others in the organisation who should receive order confirmation emails for this standing order. Email addresses must be semi-colon separated, e.g., johns@cv.com;sallyb@cv.com
Shared Order: default: ticked. Shared: all Customer Users including standing order administrators can edit the standing order. The standing order will still be active if the User who created it is inactive. If unticked, the standing order is 'Personal'. Only the User who created the standing order, the approver (if this option is used) and standing order administrators can edit it. All other Users can only view it. If the User who created the personal standing order becomes inactive, the standing order will not continue.
Recurrence pattern: (i) first, select 'daily', 'weekly', 'monthly' or 'yearly', then (ii) set the day the order is to recur.
Range of recurrence: enter the start date and if required, the end date of the standing order
Terms and Conditions: if set by Admin, the User must acknowledge they have read the Standing Order Terms and Conditions by ticking the checkbox before continuing. If your business does not require this consent, the T&C section may not be displayed.

5. When they have finished, they click the **Save Standing Order** button to save the standing order. If approval is not required, the standing order will be active! If approval is required, the order will be in 'awaiting approval' status and the approver will be notified by email.

Processing of recurring orders

A daily scheduled task will automatically check for recurring orders and submit them to be processed. A recurring order will be validated as per the usual process after order submission. Order totals and product availability will be checked and updated. If a product is no longer available, it will be listed in the order confirmation email and removed from the Standing Order.

A recurring order will not be processed if any of the following applies:

- The standing order is a 'personal' standing order and the Owner has been deactivated or is permanently inactive.
    - **Note -** for a shared order with deactivated/inactive Owner, orders will still be processed. Order notifications will be sent to the cc'ed Users and the notification recipient in your company (nominated by your Administrator).
- The standing order is suspended.
- The standing order requires approval selection.
- The standing order has expired.
- The standing order was created by:
    - a Role that no longer has standing orders enabled,
    - a Customer that no longer has standing orders enabled,
    - a User or User Customer that no longer has standing orders enabled.
- The Standing Orders function have been disabled at the system level (for your website).

ⓘ **Remind emails**

Check with the Website Administrator whether the Owner and any cc'ed Users will receive a reminder email a certain number of days before the recurring order is placed. Receiving this notification will enable the Owner to decide whether the recurring order is needed or have quantities adjusted. A recurring order can always be cancelled, e.g., if supplies do not need to be replenished yet.
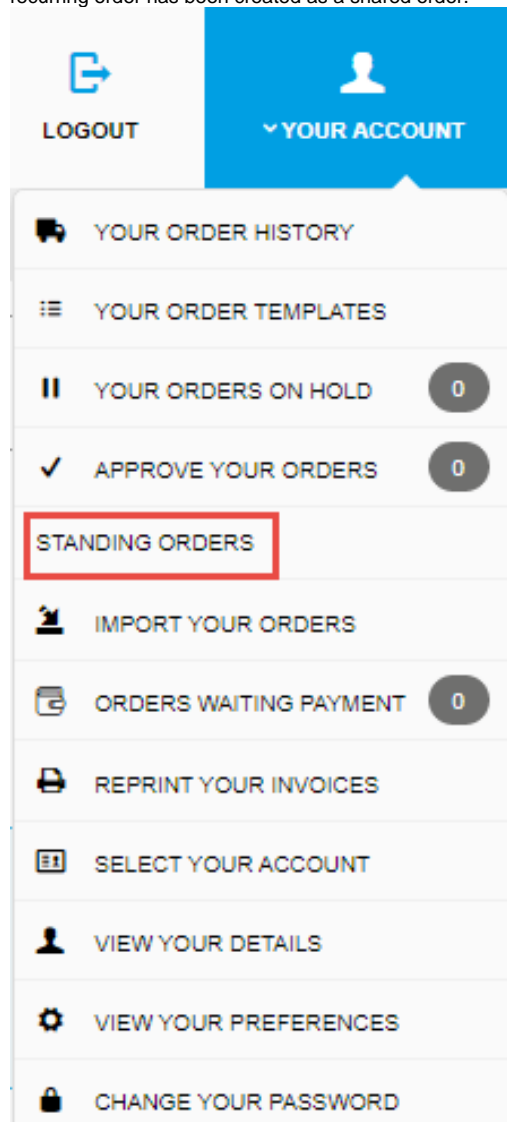
Email notifications

User type	Event	Notes
Owner (and any cc'ed recipients)	- Order confirmation/notification email for each recurring order, including - standing order details and schedule - details of any product not available for the order - details of suspension of order (if applicable) - details of approval triggered (if applicable). - Recurring order not processed - over budget - Change of standing order ownership. - Standing Order nearing expiry warning (X number of days before the expiry date). - Recurring order date due soon reminder (X number of days before the next recurrent order). If Order Approvals is active: - Standing order still awaiting approval (when approver has not approved by the scheduled ordering processing date) - Standing order approved	Change of standing order ownership email also sent to new owner
Approver (if used)	- Standing order awaiting approval - Standing order still awaiting approval (when approver has not approved by the scheduled ordering processing date)	

NOTE - in addition, team members internal in your organisation may be set to receive notifications about specific standing order events, e.g., owners that are now inactive Users.

Standing Orders screen

For Users with Standing Orders access, a **Standing Orders** menu item will appear on their Dashboard. Selecting this menu item allows the User to access standing orders and order details. They can also edit the order if they are the owner of the order. a standing order administrator, or the recurring order has been created as a shared order.

Clicking on **Standing Orders** takes the User to the '**Order Templates**' list.

View and edit the Standing Order

(**Note -** if the User is not the owner of a standing order, they cannot edit the order unless they are a standing order administrator or this order has been selected as 'shared'.)

A User can click the **View** button to view a standing order's details.

On this screen, a user can also create a new order based on the current one by clicking the **Add All to Cart** button. Before they do this, they can also change the quantity and add notes.

| ◀ RETURN TO LIST | | | GO TO CURRENT ORDER ▶ | 🖨 PRINT |

12345

| | | 🛒 ADD ALL TO CART | ↻ UNDO ALL CHANGES |

Product		Price (ex GST)	Ext. Price (ex GST)	Qty
	Purex Toilet Tissue 2 Ply, Pack of 12 Code: 2664933 (Pack) Notes ❓ [Add Product Note] ✅ 170 in Stock ✅ Delivery 3-7 Working Days	$8.08	$16.16	− 2 +

Recurrence Information

Name	12345
CC Users	sarahl3.testing@gmail.com
Next Schedule Date	2021-03-17
Share Type	Personal
Recurrence	Every 1 day(s)

Subtotal (ex GST)	$16.16
Charges	$6.67
Freight and Handling Charges	
Plus GST	$3.42
Total (inc GST)	**$26.25**

If the User has editing rights to this standing order, the screen will include editing options:

12345

| Search for products | ✔ ADD TO STANDING ORDER | | OPTIONS ▼ | ✖ CLEAR QTY'S | ✖ REMOVE ALL | 🛒 ADD ALL TO CART | ⟳ UPDATE | ⟳ UNDO ALL CHANGES |

Product		Price (ex GST)	Ext. Price (ex GST)	Qty	Options
	Purex Toilet Tissue 2 Ply, Pack of 12 Code: 2664933 (Pack) Notes ❓ Add Product Note ✅ 170 in Stock ✅ Delivery 3-7 Working Days	$8.08	$16.16	− 2 +	☐ Delete

Recurrence Information

Name	12345
CC Users	sarahl3.testing@gmail.com
Next Schedule Date	2021-03-17
Share Type	Shared
Recurrence	Every 1 day(s)

Subtotal (ex GST)	$16.16
Charges	$6.67
Freight and Handling Charges	
Plus GST	$3.42
Total (inc GST)	**$26.25**

This User can perform the following functions:

- edit the current products in the order
- add other products to the order
- edit the schedule
- change the standing order's owner
- suspend the order's recurrence
- cancel the next order
- delete the whole standing order.

Edit current products

For each order line,

Qty

1. Edit the quantity − 3 + . **NOTE -** *If you do not want to delete the order line from the saved standing order but want to omit an order line from the next order recurrence, change the quantity to '0'.*

2. *Add any product notes required.*

3. *Once you start editing the order, the* **Update** *button* ⟳ UPDATE *becomes active. When you are ready to save the edited order, click this button.*

Add other products

To add other products to the order,

1. *Go to the Search box in the top left of the screen.*

2. *Find the product code you wish to add, then click the* **Add to Standing Order** *button.*

3. *The product is added as a separate order line. Edit the quantity and add product notes if required.*

4. *When you are ready to save the edited order, click the Update button.*

Edit the schedule

To edit the standing order's schedule,

1. *Hover on the* **Options** *button and select* **Edit Schedule***.*

2. The 'Edit Schedule Standing Order' screen is displayed. Change the schedule details as required. (See *Schedule Standing Order* for assistance.)
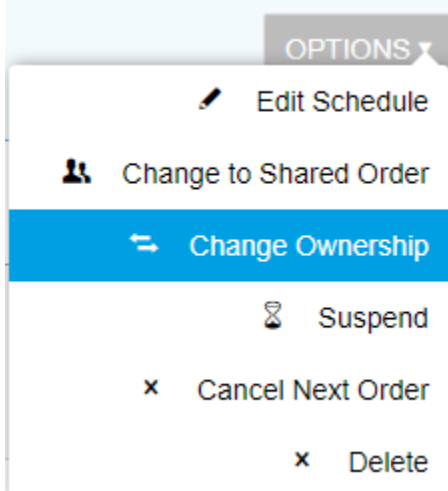

3. To save your changes, click **Save Standing Order**. You will be returned to the Order screen.

Change the standing order's owner

The owner defaults to the User who created the standing order. This can be changed to another User.

To change the owner,

1. Hover on the **Options** button and select **Change Ownership**.

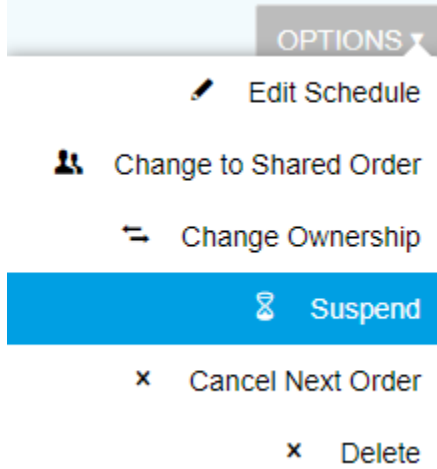2. In the Change Ownership screen, enter the email address of the new owner.
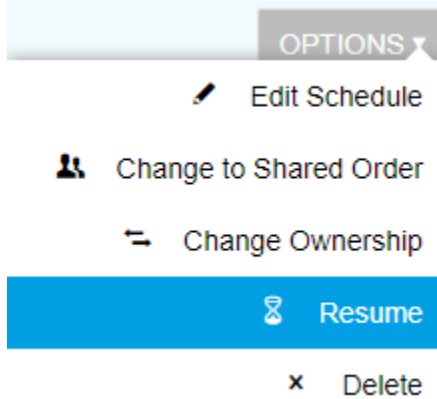

3. Click the **Confirm** button.

Suspend the order's recurrence

The standing order can be paused and restarted at any time. To pause the recurrence,

1. *Hover on the **Options** button and select **Suspend**.*

2. *The recurrence will pause immediately. The 'Suspend' menu item changes to **Resume**.*
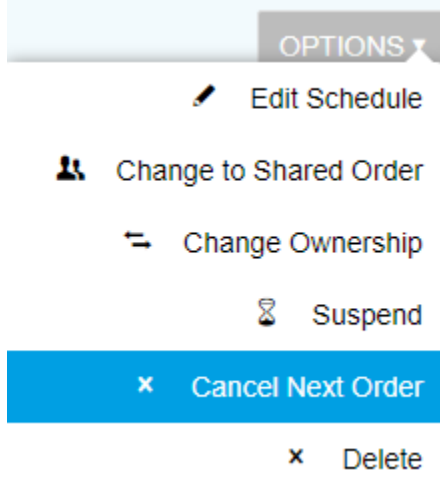

3. *The standing order's recurrence can be restarted at any time by selecting **Resume**.*
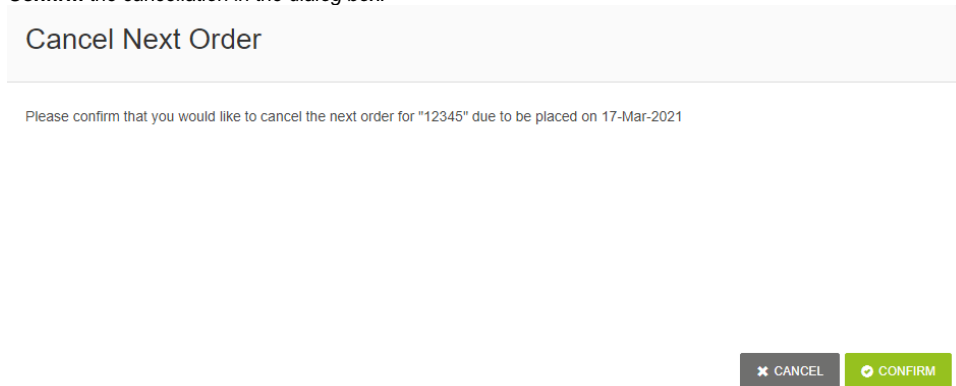
Cancel the next order

Only the next recurring order can be cancelled. Subsequent recurring orders will continue to be placed. **NOTE -** this option is not available if the standing order is currently suspended.

To cancel the next order,

1. Hover on the **Options** button and select **Cancel Next Order**.

OPTIONS ▾

✎ Edit Schedule

👥 Change to Shared Order

⇄ Change Ownership

⧗ Suspend

✕ Cancel Next Order

✕ Delete

2. **Confirm** the cancellation in the dialog box.

Cancel Next Order

Please confirm that you would like to cancel the next order for "12345" due to be placed on 17-Mar-2021
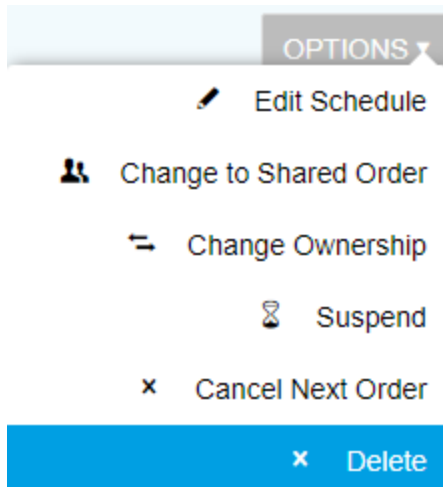
✕ CANCEL   **⊘ CONFIRM**

> ✓ If you want to send the order but want to omit particular order lines, go to Edit the Standing Order and change the quantity of the product to '0'.
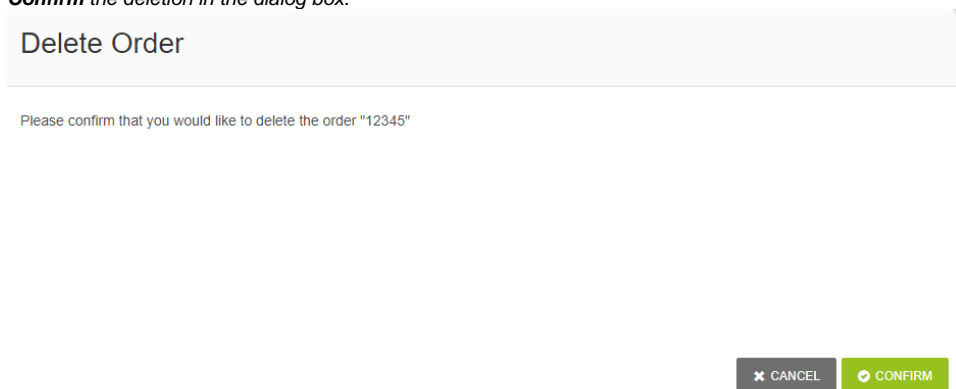
Delete the standing order

To delete the standing order,

1. Hover on the **Options** button and select **Delete**.

OPTIONS

✎ Edit Schedule

👥 Change to Shared Order

⇆ Change Ownership

⧗ Suspend

✕ Cancel Next Order

✕ Delete

2. **Confirm** the deletion in the dialog box.

Delete Order

Please confirm that you would like to delete the order "12345"

✕ CANCEL   ⊘ CONFIRM

3. Once the standing order is deleted, it will disappear from the **Standing Orders** screen.

Additional Information

With order tracking enabled, it's possible to customise the order status descriptions that users see. Refer to How to customise Order Status descriptions for further information.

Minimum Version Requirements	** ** ** . . .
Prerequisites	**
Self Configurable	Yes
Business Function	Ordering
BPD Only?	Yes
B2B/B2C/Both	B2B
Third Party Costs	n/a

Related help

- Preferred Delivery Date
- How Order Integration Works
- Standing Orders Settings
- Order Templates
- Online Returns
- Enforce Pack Quantities Globally
- Backordered Products & Ordering