Create a Manual Order

This article applies to:

Max Classic

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1. While viewing a contact record, click on the **Order** tab.
2. Click on the **Add Order** button.
3. Go to the *Order Information* section.
    - (Optional) **Order Title**: By default, this field is populated with order date. but you can edit it. The title is displayed in the person's order history as a hyperlink to access the order details.
    - (Optional) **Order Date**: By default, this field is populated with the current date, but you can edit it. Order Type: Select offline from the drop-down.
    - (Optional) **Order Notes**: Add order-specific notes if needed. These notes are only visible to your users.
    - (Optional) **Lead / Sale Referral Partner**: Type in the name of a referral partner to credit their partner commissions for this sale. This field is automatically populated if a referral partner is already associated with the customer's contact record.
    - (Optional) **Invoice Template**: Select a custom invoice template from the drop-down.
    - (Optional) **Promo Codes**: Click on the Edit Promo Codes link to select a promo code for the order. The promo code can be used to track ad effectiveness. It does not automatically apply a discount.
4. Click the **Save** button.
5. Click on the **Add Order Item** button to enter the first product for this order. Each product is added separately.
    - **Product ID**: Enter a product name to search for a product in your database. Max Classic will display a list of possible matches. Click on a product to select it.
    - **Type**: Select a type from the drop-down.
    - **Item Name**: This defaults to the product name, but you can edit it. This name is displayed on the order invoice.
    - **Item Description**: This defaults to the product's short description, but you can edit it. The description is also displayed on the order invoice.
    - (Optional) **Charge Inventory**: This defaults to Yes, meaning Max Classic will deduct this item from the inventory entered in the product record. This setting only applies if you are using Max Classic to track inventory levels and receive low inventory alerts.
    - **Qty**: The default quantity is 1. Change this number if the customer is buying more than one of an item.
    - **Price/Unit**: This defaults to the regular product price, but you can edit it to change the price of the product. This may be needed if you offer variable pricing.
    - (Optional) **Cost/Unit**: This defaults to the cost recorded in the product record, but you can edit it. This is your cost for creating and delivering the product.
    - (Optional) **Notes**: Add product-specific notes here. These notes are only visible to your users.
6. **Save** the first item. Repeat this process to add more items to the order.
7. **Save** the order. It has been created as an unpaid order.
8. Click on the **Preview Invoice** button to view the order invoice and send it to the customer.