Manually create an order for a subscription

Before you can create a manual order, you must create a contact record for the customer. After you create a contact record, there are two ways you can enter the person's order: you can add the order from the main navigation menu, or from the order tab in the 2nd row of tabs in the contact record.

> Note: These instructions apply to subscription orders. You will need to create a separate order for any products.

1. While viewing the contact record, click on the **Order** tab.

2. Click on the **Add Subscription** button.

3. Go to the *Subscription Setup* section.
   - **Program:** Select a subscription program from the dropdown.
   - **Qty**: The default quantity is one. Change this number if the customer wants to purchase more than one of the same program.
   - (Optional) **Billing Cycle**: This defaults to the billing cycle you defined when you set up the subscription program, but you can change it.
   - (Optional) **Billing Amt**: This defaults to the price you defined when you set up the subscription program, but you can change it.
   - (Optional) **Charge Tax**: This defaults to the tax setting in the subscription program record. If the default is Yes, you can change it to No to override the default.
   - (Optional) **Lead / Sale Referral Partner**: Type in the name of a referral partner to credit their referral partner commissions for this sale.
   - **Order Type**: Select offline from the dropdown.
   - (Optional) **Invoice Template**: Select a custom invoice template from the drop-down.

4. Go to the *Recharge Information* section.
   - **Auto Charge**: The default auto charge setting is *Yes*. This means the system will charge each recurring fee automatically, based on the billing cycle you defined. Set this to *No* if you want to manually charge and record each payment.
   - **Credit Card 1**: Select an existing credit card from the drop-down, or click on the **Add** button to enter a new one. This is the primary credit card.
   - (Optional) **Credit Card 2**: Select an existing credit card from the drop-down, or

click on the **Add** button to enter a new one. *Note: This is a backup credit card. It will be billed if Credit Card 1 fails.*
    - **Merchant Account**: Select a Merchant Account from the dropdown.
    - (Optional) **Max Charge Attempts**: This number is the maximum number of times the system will try to run a charge if the first attempt fails. The default you defined under **E-Commerce > Settings > Orders** is displayed, but you can change it.
    - (Optional) **Num Days Between Retry**: This is the number of days the system will wait before trying to run a charge again, when the previous attempt fails. The default you defined under **E-Commerce > Settings > Orders** is displayed, but you can change it.
    - (Optional) **Email Invoice to customer upon successful payment**: When this checkbox is marked, the customer will receive an email notification for each successful recurring subscription charge. The default invoice you defined under **E-Commerce > Settings > Orders** is displayed, but you can change it.

5. Go to the *Current Status* section.
    - (Optional) **Status**: This defaults to active, which means the customer will get charged. You would only select Inactive to cancel a subscription and stop the automatic billing.
    - (Optional) **Start Date**: This defaults to the current date. You can change this date to represent the true start date.
    - **First Bill Date**: Enter the date for the first subscription charge. Enter the current date to charge it immediately or enter a future date to delay billing (i.e. free trial, arrears billing.)
    - (Optional) **End Date**: Enter an end date if this is a micro-continuity program that has a limited duration (like 6 months). Leave this blank if the customer remains in the program until asking to cancel.
    - **Reason Stopped**: This field is only relevant when canceling a subscription. Leave it blank when you create a new one.

6. Click the **Save** button to create the subscription. Saving generates the last bill date, next bill date, and next bill amount.

7. Click on the **Invoice** button to generate the first charge. This will initiate one of the following scenarios:
    - **If Auto Charge is set to Yes and Email Invoice is checked**: The customer's credit card is billed and the system will automatically email the customer a paid invoice.
    - **If Auto Charge is set to Yes and Email Invoice is unchecked**: The customer's credit card is billed, but you must click on the Invoice link to manually generate / send an invoice to the customer.
    - **If Auto Charge is set to No and Email Invoice is unchecked**: You must click on

the **Invoice** link to manually enter the payment and generate / send an invoice to the customer.

- **If Auto Charge is set to No and Email Invoice is checked**: You must click on the **Invoice** link to manually enter the payment. When the payment is recorded, the system will automatically send an invoice to the customer.