

Create a Quick Sale Order

This article applies to:

Once you understand the manual order process, you may want to use the quick sale option to quickly create a single-item order for a one time only product (no subscriptions.)

This option gives you control over the following:

- Adjusting the product price
- Payment Option: No Payment, Auto Charge, Manual Payment (e.g. check)
- Payment Plan: Create a custom payment plan for the order
- Shipping: This method uses the order form shipping groups
- Applying referral partner commissions
- Actions: Quick sales do NOT trigger purchase actions. You will be able to select an action set to run.

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

2. Select a product from the quick sale drop-down.

3. Enter Sale Details:

- (Optional) **Adjustment:** Use this field to adjust the product price based on your agreement with the customer.
- (Optional) **Sale Notes:** Add order specific notes to maintain a record of any non-standard order requests or the reason for the price adjustment.
- (Optional) **Promo Code:** Select a promo code from the dropdown. These promo codes are used to track advertising effectiveness. They do not apply a discount.
- (Optional) **Order Type:** The order type is set to offline by default. You should not need to change this for a manual order.
- **Charge Sales Tax:** The default setting is *Yes* or *No* based on the choice you defined under **E-Commerce > Settings > Orders**. Select *Yes* to apply sales tax. Select *No* to exclude sales tax from the order.

4. Enter Payment & Auto-charge Details

- Choose a Payment Option from the following:
 - **I don't want to record a payment at this time**
 - **Pay with Credit Card:** Select an existing card or Add a new one to charge the credit card when you complete the order.
 - **Make a Manual Payment:** Choose a Payment Type from the dropdown that is not Credit Card (Charge Now). You will use this option to record cash, check, and credit card payments processed outside of Max Classic. No payment processing will take place when a manual payment type is selected, as this is only recording payment in the order.
- Enter the **Payment Amount**. This amount will be applied to the order total and, if the customer is paying with a credit card, charged automatically when you complete the order.
- (Optional) Add a **Note** about the payment.

- (Optional) **Apply to Commissions:** This is set to Yes by default, which means the system will automatically calculate and apply referral partner commissions to this order. Choose No if the lead and/or sale partner are not eligible for commissions on this order.
5. (Optional) Enter Payment Plan Details. You only need to use these settings if the customer is going to pay for the purchase in multiple installments.
- **Initial Payment Amount:** This amount generally includes up front fees, shipping, and taxes.
 - **Initial Payment Date:** Enter the payment date (usually today's date.)
 - **Plan Start Date:** Enter the date for the first charge of the remaining installments.
 - **# Payments:** Enter the number of remaining payments, excluding the initial payment amount you've already recorded (e.g. For a total sale of \$1200, the customer might pay an initial payment of \$500. The remaining \$700 may be broken into 2 payments of \$350 each.)
 - **Days Between Payments:** Enter the number of days to wait between the remaining payments. This defaults to 30 days, but you can change it.
6. (Optional) If this is a shippable product, enter **Shipping**
- **Shipping Group:** Select an existing group from the dropdown or click on Create to add a new shipping group.
 - **Shipping Option:** Select a Shipping Option from the choices assigned to the Shipping Group you selected.
7. (Optional) Assign Commissions
- Select the Lead and / or Sale Referral Partner who are eligible for commissions on this order.
8. (Optional) Apply Actions
- Select an [action set](#) from the dropdown. *A quick sale does not trigger purchase actions or order form actions. You must manually select an action set.*
9. Click the **Save** button to complete the order.
- Note: If the customer is paying by credit card, the charge will be applied when the order is saved or auto-charged in the future on the initial payment date.
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