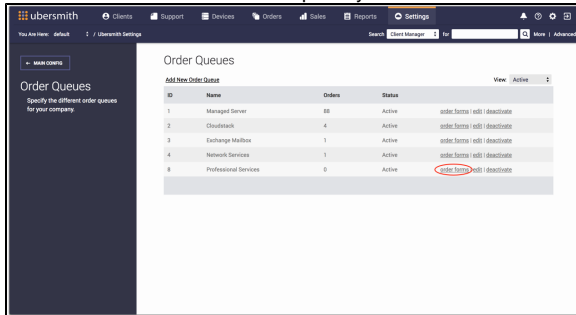


# Adding Order Forms

Once you have created an order queue, you must configure its corresponding order form, so your clients can place an online order.

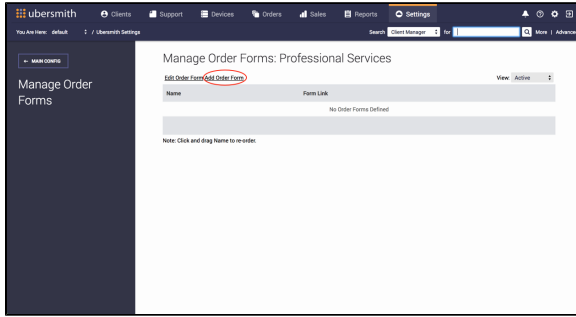
## Accessing Order Forms

1. [Access the Order Queues page.](#)
2. Click **Order Forms** for the order queue you want .



The *Manage Order Forms* page appears.

3. Click **Add Order Form**.



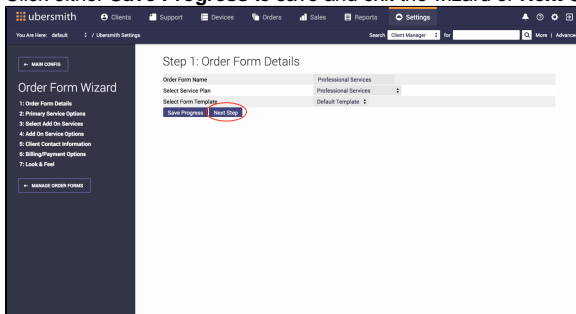
The *Order Form Wizard* appears.

## Complete the Order Form Wizard

The Order Form Wizard consists of seven steps. At any point, you can save your progress and come back to it. Any *Options* page can be skipped.

### Step 1: Order Form Details

1. In the **Order Form Name** field, enter the name of the order form.
2. In the **Select Service Plan** field, select which service plan the client will be signing up for when using this form.
3. In the **Select Form Template** field, select which html template the form should use. There are two standard options, the default template and the flexy-dynamic template. Custom templates can also be uploaded.
4. Click either **Save Progress** to save and exit the wizard or **Next Step**.



### Step 2: Primary Service Options

In Step 2, you can customize which service-related fields to include in the order form. The first displayed fields are standard input fields for the new service. Below those, any configured custom service fields display. The last set of fields are configured upgrade options, displayed by their upgrade group.

#### On this page:

On this page:

- [Accessing Order Forms](#)
- [Complete the Order Form Wizard](#)
  - [Step 1: Order Form Details](#)
  - [Step 2: Primary Service Options](#)
  - [Step 3: Select Add On Services](#)
  - [Step 4: Add On Service Options](#)
  - [Step 5: Client Contact Information](#)
  - [Step 6: Billing/Payment Options](#)
  - [Step 7: Look & Feel](#)
- [Related Topics](#)

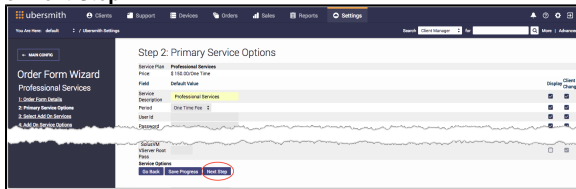
1. Click **2: Primary Service Options**
2. In the **Default Value** field for each appropriate service field to include, update the default value as appropriate.
3. Select the **Display** option for each field you want to display in the order form.
4. Select the **Client Change** option, if you want your client to be able to change the input value, for each field.



#### Note

A field set to only display disables the field. A field without any options selected, removes it from the order form.

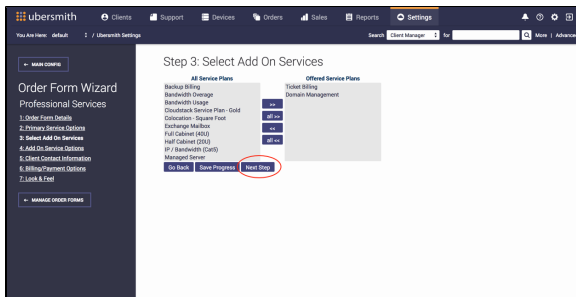
5. Click either **Go Back** to return to the previous step, **Save Progress** to save and exit the wizard or **Next Step**.



## Step 3: Select Add On Services

In Step 3, you can include any other related or complimentary service plan for the client to include in their order. For example, if the order form is a dedicated server, you could include a separate backup service as an optional add on.

1. Click **3: Select Add On Services**.
2. In the **All Service Plans** field, select a service to include in the order form, then click the arrow to move it to the **Offered Service Plans** field.
3. Click either **Go Back** to return to the previous step, **Save Progress** to save and exit the wizard or **Next Step**.



## Step 4: Add On Service Options

In Step 4, you can customize which service-related fields to include in the order form for the add on services you included from Step 3. If no add-ons were selected, you will move directly to Step 5.

The first displayed fields are standard input fields for the new service. Below those, any configured custom service fields display. The last set of fields are configured upgrade options, displayed by their upgrade group.

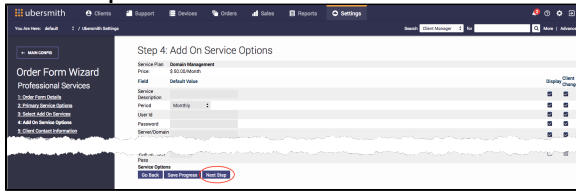
1. Click **4: Add On Service Options**.
2. In the **Default Value** field for each appropriate service field to include, update the default value as appropriate.
3. Select the **Display** option for each field you want to display in the order form.
4. Select the **Client Change** option, if you want your client to be able to change the input value, for each field.



#### Note

A field set to only display disables the field. A field without any options selected, removes it from the order form.

- Click either **Go Back** to return to the previous step, **Save Progress** to save and exit the wizard or **Next Step**.



## Step 5: Client Contact Information

In Step 5, you specify which client-specific fields to include in the order form.

The first field creates a login and password field, so existing clients can verify their accounts and add new services to their accounts. This field bypasses the Provision Client order step in the order queue. The second field creates a password for the client during the Lead order step and displays the password in the order form's password field. The next displayed fields are standard input fields for the client account information. Below those, any configured custom contact information fields display.

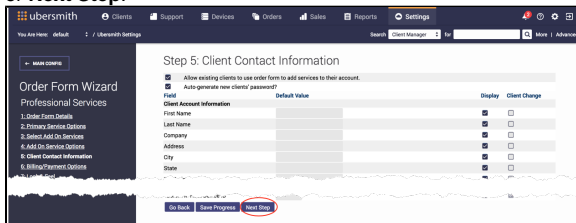
- Click **5: Add On Service Options**.
- Select **Allow existing clients to use order form to add services to their account** to add login and password fields to the order form, so existing clients can verify their account and add the service.
- Select **Auto-generate new clients' password** to create a default password for the client.
- In the **Default Value** field for each appropriate service field to include, update the default value as appropriate.
- Select the **Display** option for each field you want to display in the order form.
- Select the **Client Change** option, if you want your client to be able to change the input value, for each field.



### Note

A field set to only display disables the field. A field without any options selected, removes it from the order form.

- Click either **Go Back** to return to the previous step, **Save Progress** to save and exit the wizard or **Next Step**.



## Step 6: Billing/Payment Options

In Step 6, specify which payment methods the client can use and how the initial bill will be calculated.

The first section sets the pricing for the initial sign up period. You can select a specific day of the month that all new orders should be prorated to. For example, setting the prorate date to 1 prorates all incoming orders to the first of the following month.

You can also specify the cutoff day for the prorated service to begin during the next full renewal period. If all orders are prorated to the first of the following month, setting the second field to 20 prorates the service so orders received on or after the 20<sup>th</sup> would prorate to the second following month. For example, if an order is received on October 20<sup>th</sup>, the service will be prorated to December 1, instead of November 1.

The third option inserts a discount coupon code field that either applies the discount to just the requested service or the entire order. Any order submitted with a valid code, will automatically have the discount applied. Coupon codes need to be predefined in Settings beforehand.

The Payment Types to be Accepted section is a list of various payment types for your clients to pay with. Depending on which types are enabled, additional fields are necessary. The Affiliates section adds support for calls to iDevAffiliate, included on the last page of the order form, after the order has been completed.

- Click **6: Billing/Payment Options**.
- Select **Automatically pro-rate orders to the [number]** to include an option for the client to select the day of the month to prorate, and then enter the day of the month.

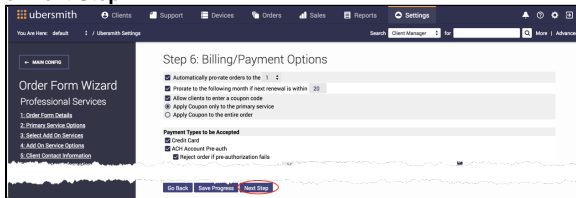
3. Select **Prorate to the following month if next renewal is within [number]** to apply a cutoff date when orders should begin on the next full renewal period and enter the day of the month.
4. Select **Allow clients to enter a coupon code** and then select either **Apply only to the primary service** or **Apply Coupon to the entire order**.
5. In the **Payment Types to be Accepted** section, select one or more payment types you accept.
6. In the **Affiliates** section, select **iDevAffiliate** to display seven fields for to enter the variables and values to include in the call to iDevAffiliate when the order is submitted.
7. In the **Credit Card Payment Details** section, update the default value as appropriate.
8. Select the **Display** option for each field you want to display in the order form.
9. Select the **Client Change** option, if you want your client to be able to change the input value, for each field.



#### Note

A field set to only display disables the field. A field without any options selected, removes it from the order form.

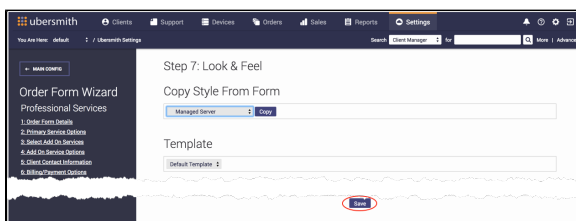
10. Click either **Go Back** to return to the previous step, **Save Progress** to save and exit the wizard or **Next Step**.



## Step 7: Look & Feel

In Step 7, you set the overall design of the form. The Copy Style From Form section lists all your order forms so you can select a specific form's style and apply it. In the Template section, you can select a template to apply. The Header/Footer contains the HTML for the header and footer of the order form. The CSS Styles section contains specific values for the various CSS controls to be used by the order form. The advanced link toggles the CSS Styles from individual entry fields to a field to enter HTML and CSS code of your preference.

1. Click **7: Look & Feel**.
2. In the **Copy Style From Form** section, select an existing order form to copy the style from and apply to the order form.
3. In the **Template** section, select a template to apply to the order form.
4. In the **Header** field, enter the HTML code to display as the header of your order form.
5. In the **Footer** field, enter the HTML code to display as the footer of your order form.
6. In the **CSS Styles** field, enter the HTML and CSS code to use for the individual order form elements, or click advanced and enter you complete HTML and CSS code.
7. Click **Save**.



## Related Topics

[Working With Order Queues](#)

[Adding Order Queues](#)

[Configuring Order Queues](#)

[Managing Order Queues](#)

[Managing Order Forms](#)

[Using the Order Manager](#)