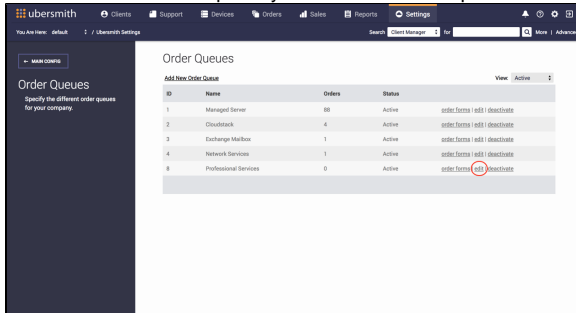


Configuring Order Queues

Once you have [created the default order queue](#), you must configure it to meet your business needs. You can customize the order process by adding steps and adding actions under those steps.

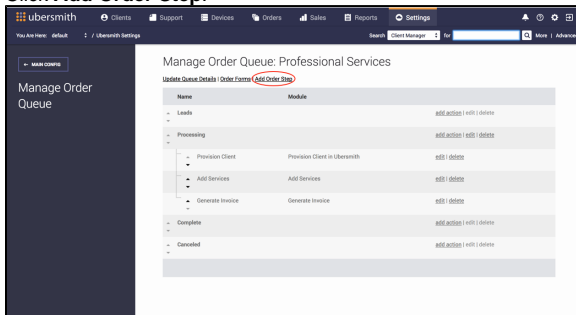
Adding Order Steps

1. [Access the Order Queues page.](#)
2. Click **edit** for the order queue you want to add a step for.



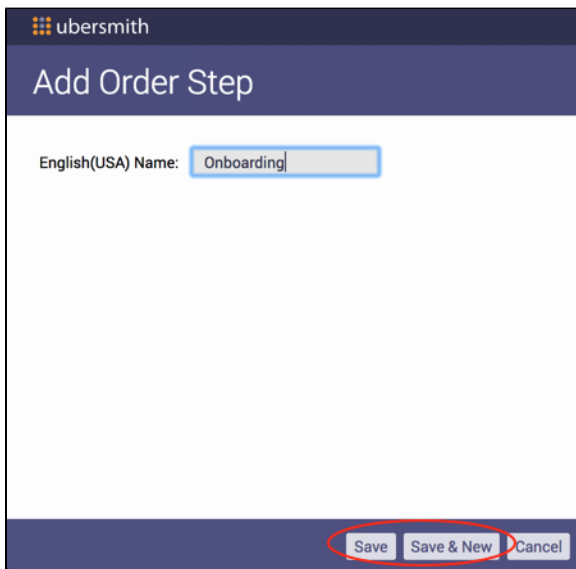
The *Manage Order Queue* page appears.

3. Click **Add Order Step**.



The *Add Order Step* page appears.

4. In the **Name** field, enter the name of your order step.
5. Click **Save** or **Save & New**.



Editing Order Steps

Note

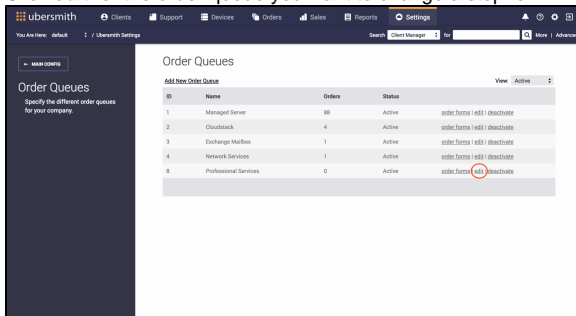
The Leads, Complete, and Canceled steps are system defaults and cannot be changed. You can change the Processing step and add more steps between the default steps.

On this page:

On this page:

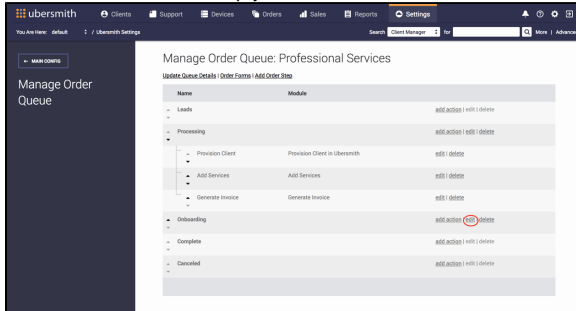
- [Adding Order Steps](#)
- [Editing Order Steps](#)
- [Adding Actions to Order Steps](#)
 - [Complete the Detail Tab](#)
 - [Complete the Prereqs Tab](#)
 - [Complete the Config Tab](#)
- [Editing Order Actions](#)
- [Reordering Order Steps and Order Actions](#)
- [Deleting Order Steps and Order Actions](#)
- [Related Topics](#)

1. Access the [Order Queues](#) page.
2. Click **edit** for the order queue you want to change a step for.



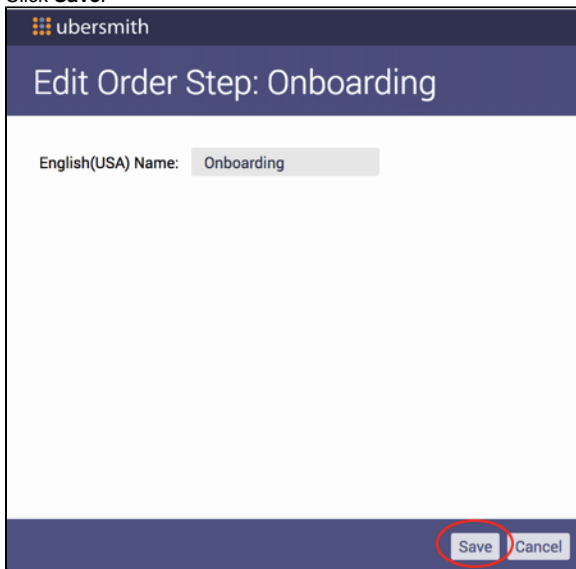
The *Manage Order Queue* page appears.

3. Click **edit** for the order step you want to edit.



The *Edit Order Step* page appears.

4. Make any necessary changes you need.
5. Click **Save**.

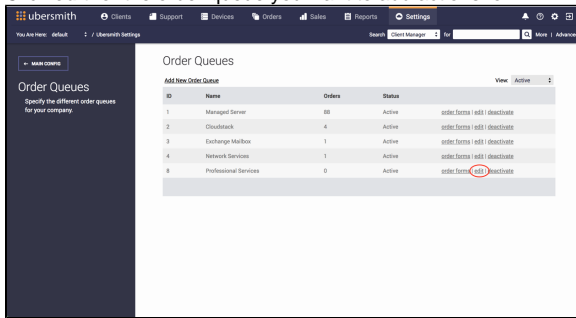


Adding Actions to Order Steps

In addition to the default order actions, any number of additional actions can be added to any step in the order queue.

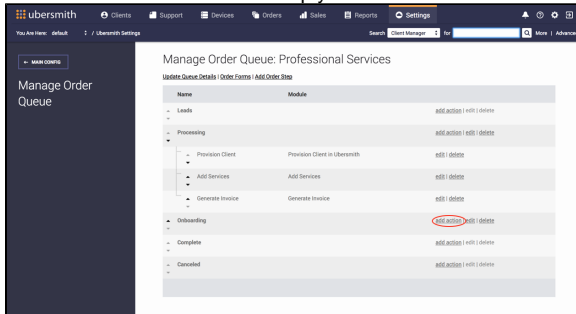
1. Access the [Order Queues](#) page.

- Click **edit** for the order queue you want to add actions for.



The *Manage Order Queue* page appears.

- Click **add action** for the order step you want to add actions.



The *Add Order Action* page appears.

Complete the Detail Tab

- In the **Name** field, enter the name of the action.
- In the **Module** field, select the appropriate module for the action.
- In the **Automatic** field, select **Yes** to have the action automatically run when the order reaches the order step the action belongs to and all prerequisites have been completed.
- In the **Optional** field, select **Yes** if you want the action to be optional, or able to be skipped. Actions that are not optional will keep an order from moving forward until it has been processed successfully.
- In the **Client Viewable** field, select **Yes** if you want the action to be visible to your clients in the Client Portal.
- In the **Persistent Display** field, select **Yes** if you want the action to always display regardless of the current status of the order.



Note

Some actions have output that is displayed in the online order form. So the order page does not get overly cluttered, the output is only displayed for as long as that order is in the same step as the action that generated it. Selecting Yes will keep the order action displayed.

The screenshot shows the 'Add Order Action' form in the Ubersmith interface. The 'Details' tab is selected. The form contains the following fields and options:

- English(USA) Name:** Send Client Welcome
- Module:** Send Welcome Letter
- Automatic:** ☒ Yes ☐ No
- Optional:** ☐ Yes ☒ No
- Client Viewable:** ☐ Yes ☒ No
- Persistent Display:** ☐ Yes ☒ No

At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

Complete the Prereqs Tab

All the order actions for the selected order step are displayed on this tab. The options on this page will be different based on how your order steps are configured. Actions that have not had their prereqs processed are not available to process or will not be run automatically.

1. Click the *Prereqs* tab.
2. Select the actions that are prerequisites to this action.

The screenshot shows the 'Add Order Action' form in the Ubersmith interface, with the 'Prereqs' tab selected. The 'Module' section shows a checkbox labeled 'Assign an Account Manager' which is checked. At the bottom of the form are three buttons: 'Save', 'Save & New', and 'Cancel'.

Complete the Config Tab

These settings determine what happens when the selected order module on the Detail tab is run. Order modules are custom PHP files that run specific code for order-related events. They carry out customized functions or integrate with third party systems. Ubersmith provides order modules that only need to be enabled and properly configured. You can also create custom modules and uploaded them directly to your Ubersmith instance without any special code or intervention from the Ubersmith team. Examples are available at [Example Order Modules](#).

Click here to see topics related to adding order modules

[Configuring AVS Check Order Module](#)

[Configuring Activate Services Order Module](#)

[Configuring Add Bank Account Order Module](#)

Configuring Add Client Order Module

Configuring Add Credit Card Order Module

Configuring Add SSL Cert Order Module

Configuring Add Services Order Module

Configuring Assign IP Addresses Order Module

Configuring Change Step Order Module

Configuring Check Fields Order Module

Configuring Control Panel Account Integration Order Module

Configuring Create Pardot Prospect Order Module

Configuring Edit Services Order Module

Configuring Email Blacklist Order Module

Configuring Find Similar Clients Order Module

Configuring Generate Invoice Order Module

Configuring Google Maps Order Module

Configuring Issue Refund Order Module

Configuring MaxMind minFraud Order Module

Configuring OnApp Integration Order Module

Configuring Open Ticket Order Module

Configuring Order cPanel License Order Module

Configuring Provision 4PSA DNS Manager Account Order Module

Configuring Provision Client in Ubersmith Order Module

Configuring Provision CloudStack Account Order Module

Configuring Provision InterWorx Account Order Module

Configuring Provision Lead in Ubersmith Order Module

Configuring Provision Services Order Module

Configuring Provision Zimbra Domain Order Module

Configuring Register Domain Order Module

Configuring Send Notification to Admins Order Module

Configuring Send Templated Email Order Module

Configuring Send Welcome Letter Order Module

Configuring Simple Process Order Module

Configuring Simple Question Order Module

Configuring SolusVM Client Integration Order Module

Configuring Telco Data Lookup Order Module

Configuring Time Difference Lookup Order Module

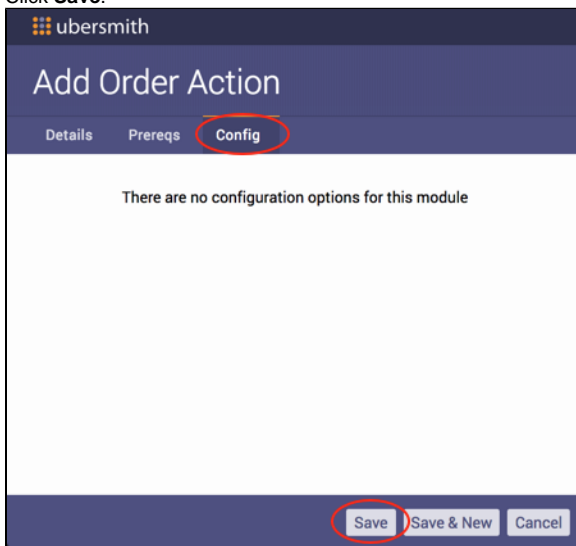
Configuring Update Fields Order Module

Configuring Verify Payment Order Module

Configuring WHOIS Domain Lookup Order Module

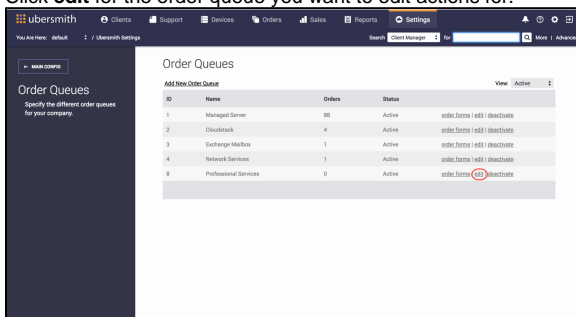
1. Click the *Config* tab.

2. Click **Save**.



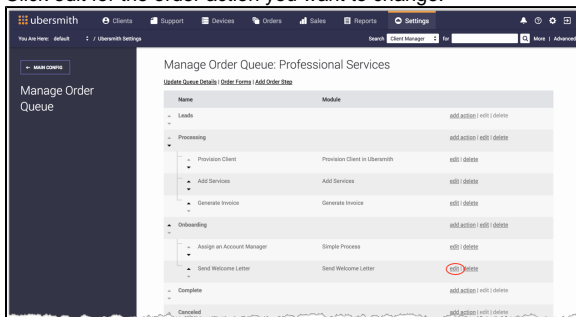
Editing Order Actions

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



The *Manage Order Queue* page appears.

3. Click edit for the order action you want to change.



The Edit Order Action page appears.

4. Make any necessary changes you need.

- Click **Save**.

Reordering Order Steps and Order Actions

Order steps and their order actions are run from top to bottom. Order steps and order actions can be moved up or down in order.



Note

The Leads, Complete, and Canceled steps are system defaults and cannot be moved. You can change the order of any steps between them.

- Access the [Order Queues](#) page.
- Click **edit** for the order queue you want to reorder steps for.

| ID | Name | Orders | Status | Actions |
|----|-----------------------|--------|--------|--------------------------|
| 1 | Managed Server | 88 | Active | order:status:edit/delete |
| 2 | Cloudwatch | 4 | Active | order:status:edit/delete |
| 3 | Exchange Mailbox | 1 | Active | order:status:edit/delete |
| 4 | Network Services | 1 | Active | order:status:edit/delete |
| 5 | Professional Services | 0 | Active | order:status:edit/delete |

The *Manage Order Queue* page appears.

- Click the **up** or **down** arrow to move the order step or order action to the desired location.

| Name | Module | Actions |
|---------------------------|-------------------------------|------------------------|
| Leads | | add:action:edit/delete |
| Processing | | add:action:edit/delete |
| Provision Client | Provision Client in Ubersmith | add/delete |
| Add Services | Add Services | add/delete |
| Generate Invoice | Generate Invoice | add/delete |
| Onboarding | | add:action:edit/delete |
| Send Welcome Letter | Send Welcome Letter | add/delete |
| Assign an Account Manager | Simple Process | add/delete |
| Complete | | add:action:edit/delete |
| Canceled | | add:action:edit/delete |

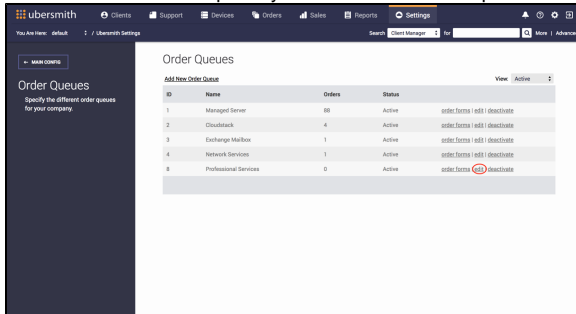
Deleting Order Steps and Order Actions



Note

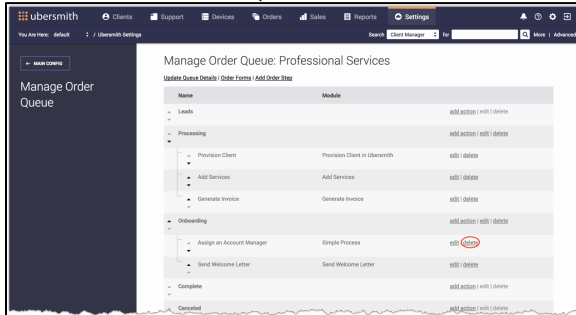
The Leads, Complete, and Canceled steps are system defaults and cannot be deleted. You can delete any steps and actions between them.

1. [Access the Order Queues page.](#)
2. Click **edit** for the order queue you want to delete a step or action for.



The *Manage Order Queue* page appears.

3. Click **delete** for the order step or action.



Related Topics

[Working With Order Queues](#)

[Adding Order Queues](#)

[Managing Order Queues](#)

[Adding Order Forms](#)

[Managing Order Forms](#)

[Using the Order Manager](#)