Working with Order Queues

Ubersmith can receive orders from the Sales Manager when a client signs a service contract, the API, when the order.create API function is called, or an online order form. When an order is received, it is sent to the appropriate order queue. An order queue consists of the steps and actions necessary to process that order.

An order queue has four default order steps: Leads, Processing, Complete and Canceled. Each step is essentially a state that an order in the queue can be in. Additional order steps can be added between Leads and Completed to customize your order processing.

Leads

The first step is Leads and is required in any order queue. The order is in the Leads step when it has begun but has not been submitted. It is created as soon as the client submits the first page of the order form, even if only one or two fields has been completed. Once the client completes the order, it moves to the next step, Processing.

Processing

The next step after Leads is Processing. Although the Processing step is created by default, it is not required and can be renamed or removed if necessary. When an order queue is first created, the Processing step has three default order actions to create new accounts, which are Provision Client, Add Services, and Generate Invoice. They can be changed or removed if necessary, though without them, new accounts will never be set up to be billed

Provision Client

The Provision Client order action creates a new client in the Client Manager from the contact data that has been submitted with an order. If any credit card or bank account information has been submitted, it also adds the payment method to the account. If the order is for a new client, this action is foundational and needs to run before any others. If the order is for an existing client, this action can still be run and will succeed without changing anything.

Add Services

The Add Services order action uses the details of the order to create the actual services. This step needs to run before any actions can be performed on those services. If the order does not include any service, this action can be skipped.

Generate Invoice

If the client paid for the new services with a credit card, a pre-authorization through the credit card gateway is run when the order is submitted. If the authorization is successful, the transaction is processed and completed. If the client paid with PayPal, it is automatically applied when this action is run. The Generate Invoice order action runs a capture transaction on success payment pre-authorizations, completing the charge.

Complete

Complete is one of two final steps. Complete means the order has been fully processed. These orders remain in the completed step, so ensure any necessary order action happens beforehand because it is easy to overlook the need if an order is marked as complete.

Canceled

The second final step of an order is Canceled, which a user can do at any time. A canceled order does not process any future actions and is essentially dead in the system. A canceled order cannot be reinstated so ensure that only orders that will never be fulfilled are canceled this way.

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