

Standing Orders Settings

Is this feature disabled?



Contact To Enable

This feature needs to be switched on for your site by Commerce Vision.

Information

For administrators.

For non-admin Roles, see: [Standing Orders Overview](#)

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Customer Access to Standing Orders

Standing Orders has builtin flexibility in how you can control which customer accounts have access to Standing Orders as it is unlikely that all your buyers will need this feature. And if they are a large organisation, they may well want to limit this function to certain users.

Controlling access to Standing Orders uses one or a combination of these three properties:

- Only Users (and Roles) that can place orders on account can create recurring orders. This can be specified in each Customer account.
- Don't enable Standing Orders globally. Instead, use the [Overrides](#) system to enable access only to specific user groups: Customer (account), Role, User, Customer User

A user may have access to multiple Customer accounts, e.g., the user is a buyer for a large organisation with separate accounts for different regions or departments. Not all these Customer accounts may want or need Standing Orders enabled.

Customer User allows you to specify that a user must be currently in a certain Customer account to access this feature. If the user switches to another account while logged in, the feature is no longer available.

- The Standing Order Administrator role can be set against one or more website users. A user with this role can view, edit and delete all standing orders in their Customer account.

This special role becomes available when Standing Orders is enabled by Commerce Vision. It can be set against a user in User Maintenance Edit User page or in the Standing Orders Settings page.

Step-by-step guide

1. Configure Standing Orders

1. Go to **Settings** **Settings** **Feature Management** **Orders & Checkout** **Standing Orders**

- For the **Standing Order Feature Settings** page, click **Configure**.

- Enable Standing Orders:** leave OFF unless you want to enable Standing Orders for all Users (apart from any Overrides). Use [Overrides](#) to enable/disable for specific Customer/Role/User/Customer User. **TIP** - Businesses would not usually permit all users to create or be responsible for standing orders.

NOTE - If you're trying to disable an enabled user or customer user and the system will not allow it, it is likely that the user is the owner (usually the creator) of a current standing order.

- Place Standing Orders When Over Order Limit:** determines whether to place a repeat order with re-priced items or other adjustments that will push the order total over a user's budget limit. (Only if the Customer account uses [User Order Limits](#).)
Toggle **ON**: the order is placed (but future repeat orders will require approval if the limit is still exceeded).
Toggle **OFF**: the order is not placed and will be skipped (and future ones will require approval if the limit is still exceeded).
- Place Standing Orders When Over Customer Budget:** determines whether to place a repeat order with re-priced items or other adjustments that will push the order total over the Customer account's budget. **NOTE** - Use the Override feature if this varies from customer to customer.
Toggle **ON**: the order is placed (but future repeat orders cannot be placed until the budget limit is available)
Toggle **OFF**: the order is not placed (and future ones cannot be placed until the budget limit is available)
* (The Owner (usually creator) of the Standing Order will receive a notification email for this event.)
- Can Administer Standing Orders:** click Overrides to set the Roles or Users that will be Standing Order Administrators. This special role can view, edit and delete all standing orders in their Customer account. Enabling/disabling this role can also be done for a specific user on the Edit User page.
- Number of Days Before Expiry to Notify Users:** enter the number of days before a standing order expires for an alert to be emailed to the Owner and any cc'ed Users. Default: 14 days; **TIP** - To turn off this notification, set the number to '0'. (For this function to work, the Standing Order Days Expiry Notifier task must be scheduled. See: [Task Scheduler](#).)
- Standing Order Email Due Days:** enter the number of days before a standing order is to be placed for an alert to be emailed to the Owner and any cc'ed Users. Default: 5 days;
- Notification Email Address**, enter one or more internal (staff) email addresses to receive standing order notifications. Multiple email addresses must be semi-colon separated.

Notification about Inactive User Owner
If the Owner of a 'shared' standing order has been deactivated, these recipients will receive a notification that a 'shared' standing order exists for a deactivated user.

- Click **Save** or **Save & Exit** otherwise your changes including any overrides will not be saved.

2. Add Configure for Schedule Standing Order Button Widget

This widget renders the **Schedule Standing Order** button on the Checkout page. This lets the user start a standing order.

⌚ Standing Order

Please review your Standing Order details before submitting.

QUICK VIEW

EDIT

Subtotal (ex GST)

\$129.55

Plus GST

\$19.43

Total (inc GST)

\$148.98

Delivery Address

EDIT

Customer Reference

Address

12346

PA ARCHITECTS LTD

5 SMITH STREET

DUNEDIN

9014

SCHEDULE STANDING ORDER

1. Go to the **Checkout** template (**Content** **Content** **Pages & Templates** **Checkout**).
2. Go to the zone where you want this button added. **TIP** - A good place is the bottom of the Step2 zone.
3. (optional) Edit the button text in the widget if needed. See: [Configure for Schedule for Standing Orders Button Widget](#)

3. Edit Standing Order widgets

When Standing Orders is enabled, standing order widgets are automatically added in various templates. These widgets render text, buttons and messages in Standing Orders templates. Text and messages can be edited.

(i) Schedule Standing Order Panel Widget

Location: Schedule Standing Order template (**Content** **Pages & Templates** **Orders**).

Purpose: Renders the text and messaging on the Schedule Standing Orders panel.

Schedule Standing Order

Standing Order Name *

SO_12348

CC Users

Semi colon separated list of email addresses

☒ Shared Order

Recurrence pattern

☐ Daily

☐ Weekly

☒ Monthly

☐ Yearly

Day

17

of every

1

month(s)

The

third

Wednesday

of every

1

month(s)

Range of recurrence

Start

18/03/2021

☒ No end date

☐ End after: 10 occurrences

☐ End by: 18/03/2022

User clicks here to view T&C

Terms and Conditions

☐ I confirm I have read and accept the Terms and Conditions.

CANCEL

SAVE STANDING ORDER

What you can do:

- Enable/disable force users to accept the Standing Order Terms and Conditions before they can save standing orders.
- Edit Terms and Conditions text and related messaging. **NOTE** - If the Terms and Conditions textbox is empty, the T&C section is not displayed to the User.

Guide to widget: [Schedule Standing Order Panel Widget](#)

(ii) Standing Order Schedule Information Widget

Location: Standing Order Summary [template](#) (Content Pages & Templates Orders).

Purpose: Renders the heading text of the recurrence order details for the order's detail screen and in emails that include recurrence details.

12345

[ADD TO STANDING ORDER](#) [OPTIONS *](#) [CLEAR QTY'S](#) [REMOVE ALL](#) [ADD ALL TO CART](#) [UPDATE](#) [RECALL CHANGES](#)

Product	Price (ex GST)	Ext. Price (ex GST)	Qty	Options
 Purex Toilet Tissue 2 Ply, Pack of 12 Code: 2054603 (Pack) Notes Add Product Note 170 in Stock Delivery 3-7 Working Days	\$8.08	\$16.16	- 2 +	☐ Delete
 BIC Clic Blue Retractable Ballpoint Pens Medium Tip Blue Barrel, Pack of 10 Code: 2054120 (Box) Notes This required 1099 in Stock Delivery 3-7 Working Days	\$7.44	\$7.44	- 1 +	☐ Delete

Recurrence Information

Name

 12345

CS Users

 sarah@testing@gmail.com

Next Schedule Date

 2021-03-17

Shake Type

 Personal

Recurrence

 Every 2 day(s)

Subtotal (ex GST)

 \$23.60

Charges

 \$6.67

Freight and Handling Charges

Plus GST

 \$4.54

Total (inc GST)

 \$34.81

What you can do: edit heading. (Click [here](#) for help on this widget.)

Guide: [Standing Order Schedule Information Widget](#)

(iii) Configure Schedule for Standing Order Button Widget

Location: Checkout template (Content Content Pages & Templates Checkout)

Purpose: renders the button that lets a user create the Standing Order schedule

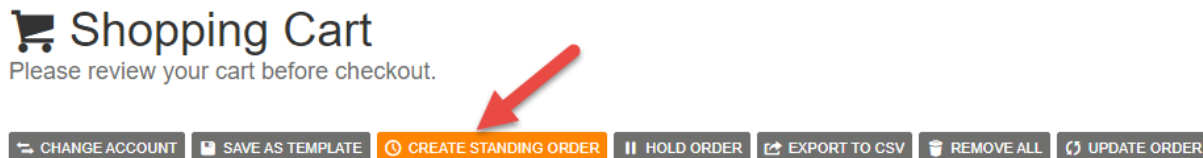
What you can do: edit the button label

Guide: [Configure for Schedule for Standing Orders Button Widget](#)

(iv) Cart Buttons Widget

Location: Cart template (Content Content Pages & Templates Checkout Cart)

Purpose: Renders the button that lets the user start a standing order. The button displays only for users enabled for Standing Orders. (**TIP** - The Widget includes buttons for other functions as well.)



What you can do: edit the text and icon displayed on the button.

Guide: [Cart Buttons Widget](#)

4. Create Scheduler Task for Standing Orders Emails

Whenever a repeat order is processed and placed, the usual order confirmation emails (and any approval-related ones) are sent to users. In addition, certain standing order events will trigger notification emails. Scheduler Maintenance tasks must be created to check for and send these emails. See: [Standing Order Emails](#)

Standing Orders scheduled tasks:

- **Standing Order Due Days Notifier:** schedules the recurring order due soon email to be sent to the Owner and any other cc'ed Users (MANDATORY if order placed due soon emails are to be sent),
- **Standing Order Expiring Soon Notifier:** schedules expiry warning soon email to be sent to the Owner and any other cc'ed Users (MANDATORY if standing order expiring soon emails are to be sent),
- **Standing Order Approver Notifier:** schedules emails for standing order approval events (ONLY IF ORDER APPROVALS IS ACTIVE ON YOUR SITE)
- **Standing Order Task:** schedules all other standing order-related emails. (MANDATORY)

1. Logged in on your website, go to **Settings Scheduler Task Maintenance**.
2. Select **New**.
3. **Begin the task:** select to send the email 'At Startup' or 'On a Schedule'. If on a schedule, this will be set up during the task.
4. **Name:** enter a descriptive name for this task.
5. **Active:** tick checkbox if this task is to be active immediately after saving.
6. **Task:** select one of the Standing Order tasks from the list.
7. **Schedule:** enter its details, e.g., start/end dates and times. **NOTE** - If task type is 'On a Schedule', enter the frequency details.
8. **Error Notification CC Emails:** enter the email address to receive failed send error notifications.
9. Click **Save**.
10. Repeat (steps 2-9) for other required scheduled tasks.

5. Edit Standing Order Emails

You can edit standing order email templates. Go to **Content Emails**.

Standing order approval emails

The Standing Order Approver Notifier task will trigger the following emails:

- **Standing Order Awaiting Approval Email:** notifies a user they are the approver for a standing order. (See [Approver Functions](#) for more information.)

The email content includes:

1. **Email title/subject:** alerts the recipient that this is an 'Awaiting Approval of Standing Order' email
2. **Order Details:** include the Order Number, Customer information, and the User who created the standing order
3. **Recurrence Information:** includes how often the order will recur, the next recurrence date, and which users if any will be alerted at each recurrence
4. **Order Summary:** includes order lines and order amount
5. **Order Address and delivery instructions** (not displayed)

The content can be edited and customised in various widgets in the Standing Order Awaiting Approval Email template.

Standing Order Processing - Awaiting Approval ¹

This Standing Order is awaiting your approval

Order Details ²

Order Number 224537352
Customer Reference 12345
Entered By Sarah T
Email Address sarah.t.testing@gmail.com
Contact Phone 0490767993
User Account 9310613 PALMER
Order Total (ex. GST) \$30.27
plus GST \$4.54
Order Total (inc. GST) \$34.81

Recurrence Information ³

Name 12345
CC Users sarah.t.testing@gmail.com
Next Schedule Date 2021-03-17
Share Type Personal
Recurrence Every 2 day(s)

Order Summary ⁴

Item	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)
 Purix Toilet Tissue 2 Ply Pack of 12 Code: 2061931 170 in Stock	2	30.00	Pack	0.00%	\$16.16
 BIG City Blue Retractable Ballpoint Pens Medium Tip Blue Barrel Pack of 10 Code: 2384120 1099 in Stock This required.	1	\$7.44	Box	0.00%	\$7.44
Subtotal (ex GST)					\$22.60
Plus GST					\$4.54
Total (inc GST)					\$34.81

- **Standing Order Awaiting Approver Selection Email:** notifies the standing order Creator/Owner they need to select an approver. Email content can be edited or customised in various widgets in the Standing Order Awaiting Approver Selection Email template.

Standing Order - Awaiting Approver Selection

This Standing Order is awaiting approver selection

Order Details

Order Number 224537352
Customer Reference 12345
Entered By Sarah Testing
Email Address sarah.t.testing@gmail.com
Contact Phone 0490767993
User Account 93106136 PALMER & PALMER ARCHITECTS LTD
Order Total (ex. GST) \$33.46
plus GST \$3.54
Order Total (inc. GST) \$37.14

Recurrence Information

Name 12345
CC Users sarah.t.testing@gmail.com
Next Schedule Date 2021-03-19
Share Type Personal
Recurrence Every 2 day(s)

Order Summary

Item	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)
 Purix Toilet Tissue 2 Ply Pack of 12					

The email content includes:

1. **Email title/subject:** alerts the recipient that this is an 'Awaiting Approver Selection' email
2. **Order Details:** include the Order Number, Customer information, and the User who created the standing order
3. **Recurrence Information:** includes how often the order will recur, the next recurrence date, and which users if any will be alerted at each recurrence
4. **Order Summary:** includes order lines and order amount
5. **Order Address and delivery instructions** (not displayed)

The content can be edited and customised in various widgets in the Standing Order Awaiting Approver Selection Email template.

Emails for Standing Order Due and Expiry

The Standing Order Due Days Notifier task will trigger the following email:

- **Standing Order Due Days Notification Email:** notifies the current owner and any cc'ed Users to remind them that a recurring order is due to be placed in 'X' number of days. Email content can be edited in the Standing Orders Due Days Widget.

The Standing Order Expiry Soon Notifier task will trigger the following email:

- **Standing Order Expiry Email:** notifies current owner and any cc'ed Users 'X' number of days before the standing order expires. The number of days is set in [standing order settings](#). Email content can be edited in the Standing Order Expiry Widget.

The email content includes:

- Date of expiry
- Email order details
- Recurrence information
- Order summary
- Order address and delivery instructions

Standing Order is About to Expire

The standing order "12345" will expire on 2021-09-19

Order Details

Order Number 224537352
Customer Reference 12345
Entered By Sarah T
Email Address sarah@testing@gmail.com
Contact Phone 0490767933
User Account 9310613 PALMER
Order Total (ex. GST) \$80.27
plus GST \$4.54
Order Total (inc. GST) \$84.81

Recurrence Information

Name 12345
CC Users sarah@testing@gmail.com
Next Schedule Date 2021-09-17
Share Type Personal
Recurrence Every 2 day(s)

Order Summary

Item	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)
 Parker Toilet Tissue 2 Ply Pack of 32					

The content can be edited in various widgets in the Standing Order Expiry Email template.

All other emails for Standing Order

The Standing Order Task will trigger the following emails:

- **Standing Order Changed Ownership Email:** notifies old owner, new Owner, and any cc'ed Users when ownership of a standing order is transferred to another user. Email content can be edited in various widgets in the Standing Order Expiry Email template.

Standing Order Owner has Changed

Order "224537352" named "12345" has had it's owner changed from "sarah@testing@gmail.com" to "sarah@testing@gmail.com"

Order Details

Order Number 224537352
Customer Reference 12345
Entered By Sarah T
Email Address sarah@testing@gmail.com
Contact Phone 0490767933
User Account 9310613 PALMER
Order Total (ex. GST) \$23.82
plus GST \$3.54
Order Total (inc. GST) \$27.34

Recurrence Information

Name 12345
CC Users sarah@testing@gmail.com
Next Schedule Date 2021-09-19
Share Type Personal
Recurrence Every 2 day(s)

Order Summary

Item	Qty	Price (ex GST)	Unit	Discount	Total (ex GST)
 Parker Toilet Tissue 2 Ply Pack of 32					

The email content includes:

- Ownership change details
- Order details
- Recurrence information
- Order summary
- Order address

The content can be edited in various widgets in the Standing Order Changed Ownership template.

- **Standing Order No Products Email:** notifies the current Owner of a standing order and any cc'ed users that a recurring order was not placed because of product unavailability.) Email content can be edited in various widgets in the Standing Order No Products email template.

Example:

Standing Order Processing - Order Has No Products

This standing order was not processed because it does not have at least 1 product with a quantity of 1 or more.

Order Details

Order Number 224537352
Customer Reference 12345
Entered By Sarah Testing

- **Standing Order Over Budget Email:** notifies the current Owner of a standing order and any cc'ed Users that due to re-pricing or re-adjustment to a standing order, the next processed order will be over budget. Email content can be edited in various widgets in the Standing Order Over Budget email template.

6. Add Standing Order Messages in Order Email Templates

Every time a recurring order is placed, the usual order notification emails are automatically sent. The most common would be the order confirmation email.

Add these widgets to order email templates to insert standing order messages.

- [Standing Order Message Widget](#) - when applicable, inserts one or more of these messages: the order is from a standing order, the next scheduled recurring order date, the order is the last scheduled order, the order needs approval.
- [Standing Order Removed Lines Widget](#) - inserts the message that one or more order lines (products) were removed from this recurrent order due to unavailability

A message will display *only* for placed orders from standing orders and when relevant to the order.

Example:

Your Order Confirmation

Thanks for your order

Please find your order details below

Order Details

Order Number	224537352
Customer Reference	12345
Entered By	Sarah Testing
Email Address	sarah13.testing@gmail.com
Contact Phone	0490767933
User Account	93936136 PALMER & PALMER ARCHITECT<D
Order Total (ex. GST)	\$23.60
Plus GST	\$3.54
Order Total (inc. GST)	\$27.14

This order was generated from Standing Order: '12345'
The next date that this Standing Order will be processed will be '2021-03-19'

To add these widgets,

1. Go to **Content Emails** and find the required email template, e.g., Order Confirmation Email
2. Go to the zone to add the message, and click **Add Widget**.
3. Find the **Standing Order Message Widget**, and click **Add Widget**.
4. Find the **Standing Order Removed Lines Widget** and click **Add Widget**.
5. (Optional) Edit the messages in the widgets and change their locations.
6. (Optional) Send a test email to view the email content. Click **Test Email** in the top right corner of the screen.

Standing Orders Reporting (option)

NOTE - standing order reports are typically custom-designed and implemented to suit your business. Please consult Commerce Vision to discuss any standing order reporting requirements.

Standing order reports can be created to track standing order information such as the following:

- Current list of standing orders
- Standing orders for closed accounts
- Standing orders for inactive users.

Additional Information

Minimum Version Requirements	4.25.00
Prerequisites	**
Self Configurable	yes
Business Function	Ordering
BPD Only?	Yes
B2B/B2C/Both	B2B
Third Party Costs	n/a

Related Resources

- [Standing \(Recurring\) Orders](#)
- [Standing Orders Overview](#)
- [Standing Order Message Widget](#)
- [Schedule Standing Order Panel Widget](#)
- [Standing Order Schedule Information Widget](#)
- [Standing Order Removed Lines Widget](#)
- [Standing Order Due Days Widget](#)
- [Configure Schedule for Standing Order Button Widget](#)