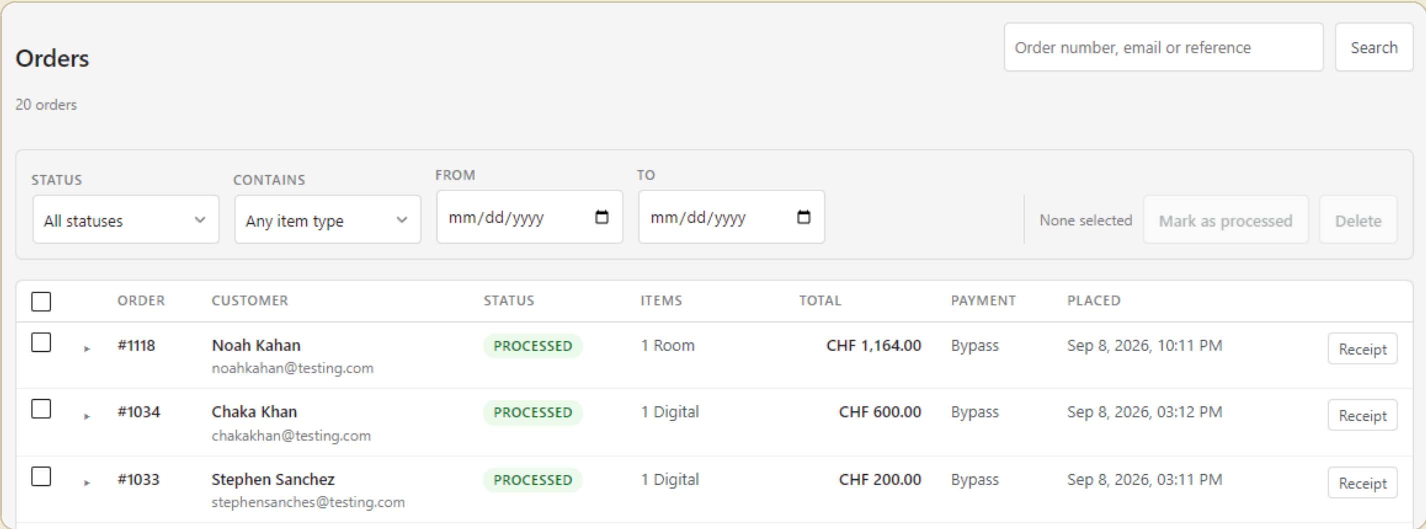
Managing Orders

DOCUMENTATION · ORDERS

What is an order?

Every completed transaction on your site creates an order. An order is the central record of what was purchased, who purchased it, what they paid, and the current status of that purchase. Whether a customer bought a single book or a course, an event ticket, and an accommodation booking in the same session — it all lives in one order record.

Orders are found under **Sales** → **Orders** in the Flowworx sidebar.



Every order across every product type, with the filter bar above and the bulk actions on the right of it.

The order list

The order list shows all orders across all product types, with the most recent at the top. Each row shows:

- **Order number** — a unique reference
- **Customer name and email**
- **Date**
- **Items purchased** — a summary of what was in the order
- **Total** — the amount paid, including any coupon discount applied
- **Status**

Filtering and searching

At the top of the orders list you can:

- **Search** by customer name or email

- **Filter by product type** — show only orders containing digital products, physical products, events, accommodation bookings, timeslot appointments, or subscriptions
- **Filter by status** — pending, confirmed, or processed
- **Filter by date range** — narrow orders to a specific period

These can be combined — for example, finding all confirmed event orders from last month.

Order statuses

The three you will see on almost every order:

STATUS	WHAT IT MEANS
Pending	Order created, payment not yet confirmed. This is the state while the customer is in the payment process — and the state a manual-payment order sits in until you confirm it.
Confirmed	Payment was successful. Access has been granted, bookings confirmed, subscriptions activated.
Processed	Everything has been fulfilled. Set automatically once confirmation and fulfilment are complete.

Orders move through this lifecycle automatically based on payment events. Under normal card payments you never advance a status by hand.

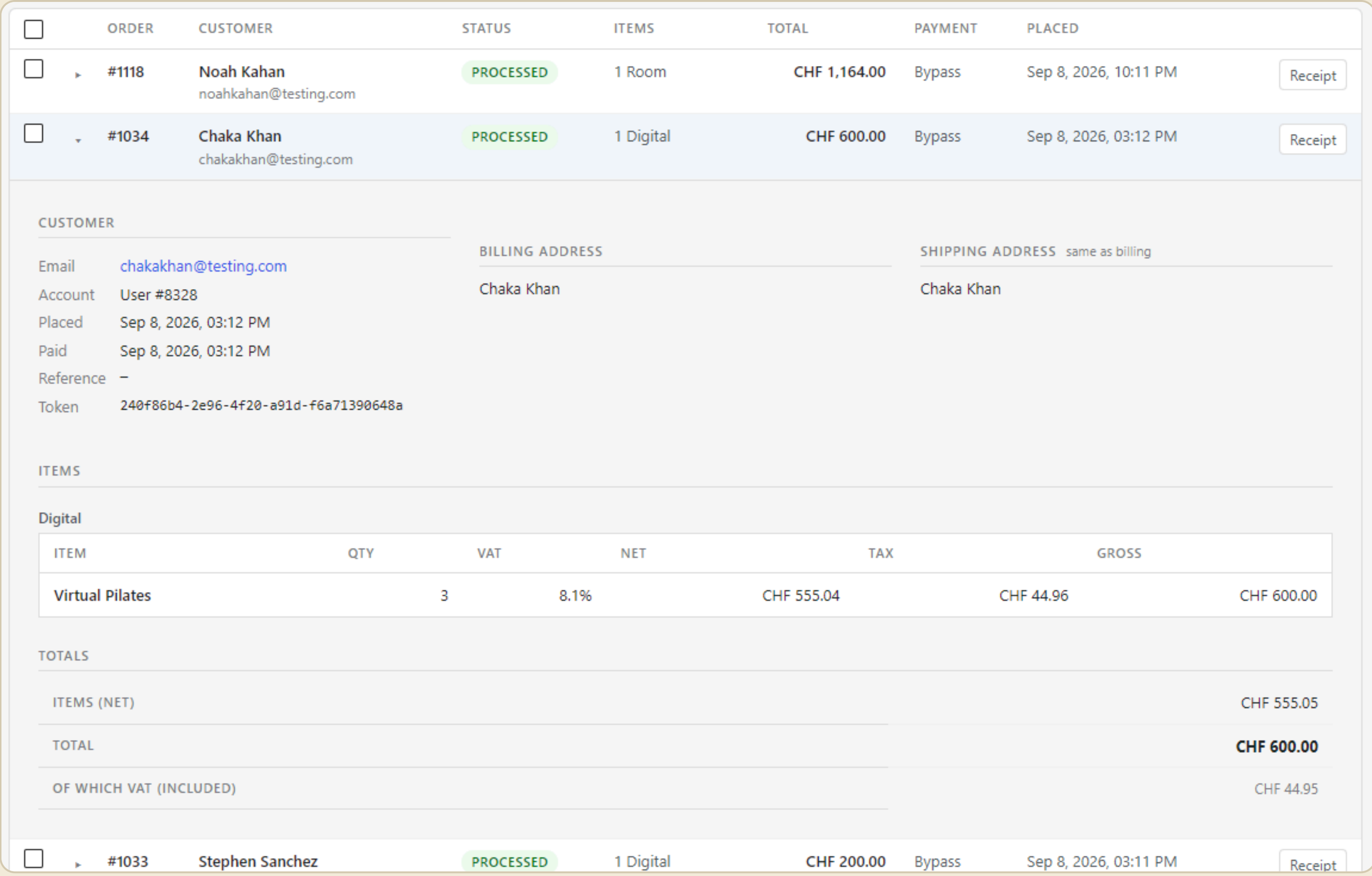
The payment gateway can also report other outcomes, which you will occasionally see on the list:

STATUS	WHAT IT MEANS
Waiting	The gateway is waiting on the payment — common with bank-transfer-style methods that do not settle instantly.
Authorized / **Reserved**	The amount is held on the customer's card but not yet captured. Treated as paid for fulfilment purposes.
Declined / **Error**	The payment did not go through. Reservations and stock are released.
Cancelled	The payment was abandoned or the order was cancelled.
Refunded / **Partially refunded**	Money was returned to the customer through the gateway.

> 📌 *A refund recorded here reflects what happened at the payment gateway. It does not automatically revoke course access or cancel a booking — if a refund should also withdraw what was delivered, do that in the relevant admin section yourself.*

Viewing an order in detail

Click any order's row to expand its full detail **in place**, underneath the row — the list stays where it is, so you keep your position and can open one order after another without navigating away. Click again to collapse it.



An order expanded in place, showing its items, totals and — on a payment plan — the installment schedule.

The detail shows:

- Customer name, email, and billing address
- Every item in the order with quantity and price
- Coupon code and discount amount, if a coupon was used
- Shipping cost, if applicable
- Tax amount
- Grand total
- Order status and timestamps

For orders containing accommodation bookings, the detail view expands to show the full booking information — accommodation name, check-in and check-out dates, number of nights, guest details, and any add-on services selected.

For orders containing timeslot appointments, the detail view shows the calendar, date, time, and the client's intake form answers.

Invoices and receipts

Every order has a PDF, downloadable from a button on its row in the order list and from the detail view. Customers can download their own copy from their profile at any time — this is self-service and does not require you to send anything manually.

Which document you get depends on whether the order is paid. The button itself tells you which one it will produce:

- **Invoice** — on an unpaid order. Headed *Invoice*, with the total shown as *Amount Due*, and carrying whatever you put in *Invoice custom content* (your bank details or payment QR code).

- **Receipt** — once the order is paid. Headed *Receipt*, showing the total paid, and carrying *Receipt custom content*.

Both include your business name, address and VAT ID, all order items, any discount, tax, and the total. There is nothing to switch — the same order produces an invoice before payment and a receipt after, and the button label follows.

> 📌 *The customer's copy follows the same rule. A customer who downloads their document before you confirm their payment gets an invoice; after you confirm, the same link gives them a receipt.*

Confirming a payment in manual payment mode

If your site runs in **manual payment mode**, this is the most important routine in this guide.

In manual mode the platform never learns that money arrived — there is no gateway to tell it. Orders are created as **Pending** and **nothing is fulfilled** until you confirm them. No course access, no confirmed booking, no activated membership, no fulfilment email.

The routine, once payment lands in your bank account:

1. Go to **Sales → Orders** and find the order — search by the customer's name or email, or filter the list to *Pending*.
2. Check the amount received matches the order total.
3. Click **Process** on that order's row (or open the order and use the same button) and confirm.

That single action runs the whole fulfilment chain at once: the order moves to Confirmed and then Processed, access is granted, bookings are confirmed, subscriptions activate, stock is decremented, and the customer receives their confirmation email and receipt.

> 📌 *Until you press Process, a paying customer has nothing. This is the step that most often gets missed — customers who "paid but can't access anything" are almost always unconfirmed orders sitting in Pending. It is worth working through the Pending list on a fixed schedule rather than reacting to complaints.*

> 📌 *Process is not reversible from the admin. Confirm the money actually arrived before you click it — the fulfilment emails go out immediately.*

Under standard card payments none of this applies: confirmation is automatic, and Pending orders are simply checkouts that were abandoned or failed.

Orders with a payment plan

Some orders are paid in installments rather than all at once — events and digital products can both be sold this way (see the Payment Plans & Installments guide for the full picture). These orders behave a little differently in the order area:

- **In the order list**, the Total column shows what has been paid against the full amount, with a "Plan · X of Y paid" note — so you can see at a glance how far along an installment plan is.
- **In the order detail**, a Payment Schedule panel lists every installment, its amount, its due date, and whether it is paid, pending, overdue, or cancelled.
- **On the receipt**, the total is broken into Order total, Paid today, and Remaining, followed by the full schedule — never a single misleading figure.

To manage installments across all orders — see what is due or overdue, send reminders, or record a payment — use the dedicated dashboard at **Sales → Installment Payments**.

> 📌 *If an order with a payment plan is cancelled or its payment fails, every still-outstanding installment is cancelled automatically. Payments already collected are left untouched — cancelling a plan does not trigger a refund.*

Orders that did not come through card payment

Orders are always created by a checkout — there is no "add order" form in the admin. What varies is how payment is handled, and that is a site-wide setting rather than a per-order choice:

- **Manual payment mode** — the customer checks out normally, receives an invoice, pays you directly, and you confirm the order with **Process** as described above. This is the right route for invoiced or bank-transfer sales.
- **Bypass payment mode** — payment is skipped and orders are fulfilled immediately. Suitable for testing or a site that charges nothing, not for recording a real sale.

Both are configured under **Settings → General Settings**. See the Platform Settings guide.

> 📌 *To give one specific customer access to something without a payment — a complimentary place, an invoice you settled outside the platform, a fix for a support case — do not change the site's payment mode. Grant it directly in the relevant admin section instead:* ***Courses → User Assignments*** *for course access, or the booking admin for a booking. That affects one person rather than every checkout on the site.*

What happens automatically when an order is confirmed

When a payment is confirmed, the platform handles fulfilment automatically:

- **Digital products** — course or content access is granted to the customer
- **Events** — ticket is recorded in the customer's profile; stock is decremented
- **Accommodation bookings** — the booking is confirmed and the dates are blocked in the calendar
- **Timeslot appointments** — the booking slot is confirmed and removed from availability
- **Subscriptions** — the membership tier is activated and the customer's role is assigned
- **Emails** — confirmation email and receipt are sent to the customer

You do not need to trigger any of this manually — it all happens on payment confirmation.

> 📌 *In manual payment mode, "payment confirmation" means* ***you*** *pressing Process. The list above then runs in full, in one go. Nothing on it happens earlier.*

When a payment fails

If a payment fails:

- The order remains in **Pending** status
- Accommodation bookings are released — availability is restored
- Timeslot slots are released
- Stock is restored for physical products and events
- No access or confirmation is sent

The customer can attempt checkout again. No manual cleanup is needed on your side.

Row actions and bulk actions

Each row in the order list carries two buttons:

- **Invoice** / **Receipt** — downloads the PDF (the label reflects whether the order is paid)
- **Process** — confirms and fulfils the order. Disappears once the order is processed.

Selecting several orders with the checkboxes gives you two bulk actions, at the right-hand end of the same bar that holds the search and filters:

- **Mark as processed** — runs the same confirmation as the Process button, across every selected order. The efficient way to clear a batch of confirmed bank transfers in manual payment mode.
- **Delete** — permanently removes the selected orders.

Each order is attempted independently, and mixed results are reported honestly. Selecting twelve orders where two are already processed gives you something like "*10 orders processed. 2 skipped — #7: already processed*" rather than a blanket failure. That is the normal case, not an edge case: you will often sweep a selection that includes orders already dealt with.

The selection is per page. Moving to another page, or changing the search or any filter, clears it — so "delete 12 orders" can never quietly include rows you can no longer see.

> 📌 **Delete does more than remove a row.** Deleting an order also deletes all of its line items, cancels any accommodation or timeslot bookings it created, cancels any subscription it started, and returns reserved stock to inventory. It cannot be undone, and there is no trash to recover from.

> 📌 *Do not use Delete to tidy up abandoned checkouts you might want to account for later. Pending orders are a record of intent, and they are the only trace of a customer who tried to buy and failed.*