

Guide for Taking Orders on Credit in OFN

Although this feature is not-yet built into OFN, with a few quick steps it is possible to allow customers to pay with prepaid credit on OFN. In a nutshell, this involves first creating a credit product that the customer checks out with. The store manager will then go into the backoffice and 'delete' this product putting 'credit' on the customer account. Future orders can then be 'paid' with the credit on the account.

Details of the Steps

First create a credit product in the backend. When creating the product in the backend also create a variant named 'Place Holder credit' variant for \$0 and with '0' for 'on hand' available. It will come in handy later in the backend order admin. Then add all the variants to an order cycle to sell the prepaid credit to your customers.

▼	Prepaid Credit	Demo Shop	Farm Share	Items				15		  
▶			\$600 prepaid credit	1	1 item	600.0	5	▼	☐	  
▶			\$400 prepaid credit	1	1 item	400.0	5	▼	☐	  
▶			\$200 prepaid credit	1	1 item	200.0	5	▼	☐	  
⊕			Place Holder credit	1	1 item	0.0	0	▼	☐	  

Here is an example credit product in the storefront that the customer can choose to add 'credit' to their account.

Shop

About

Producers

Contact

Next order closing in a day

Order for Spring 2023

Search

PrePaid Credit

Farm Share

This prepaid amount will be applied to your account and it can be used to pay for future o...

from Demo Shop

\$200 prepaid credit

1 item

\$200.00 \$0.00

?

\$200.00 / item

Add

\$400 prepaid credit

1 item

\$400.00 \$0.00

?

\$400.00 / item

Add

\$600 prepaid credit

1 item

\$600.00 \$0.00

?

\$600.00 / item

Add

Filter by

Other

Instruct the customer to choose the amount of credit they want to apply to their account and check out their order. Make sure they ‘save’ their account info by choosing ‘LOGIN’ when checking out and creating an account with a password when they check-out.

Ok, ready to checkout?

Login

OR

Checkout as guest

Login

Sign up

Forgot Password?

Your email

Choose a password

Confirm password

Sign up now

Now in the backend you will have their order with the amount of credit they are purchasing.

☐	DISTRIBUTOR	COMPLETED AT ▼	NUMBER	STATE	PAYMENT STATE	SHIPMENT STATE	EMAIL	NAME	TOTAL	
☐	Demo Shop	December 06, 2022	R512631306	● COMPLETE	● BALANCE DUE (\$600.00)	● PENDING	customer1@openfoodnetwork.ca	Rose Berry	\$600.00	

Once they have paid the order you can ‘capture’ the payment by using the green checkmark.

☐	DISTRIBUTOR	COMPLETED AT ▼	NUMBER	STATE	PAYMENT STATE	SHIPMENT STATE	EMAIL	NAME	TOTAL	
☐	Demo Shop	December 06, 2022	R512631306	● COMPLETE	● PAID	● READY	customer1@openfoodnetwork.ca	Rose Berry	\$600.00	

Then you need to go in and 'edit' the order, but first you will have to add 'on hand' to the 'place holder credit' product. Add the amount of 'on hand' equal to the number of credit orders you are processing at that time (i.e. you have 1 credit orders, add '1' as 'on hand' to the 'place holder credit' variant and SAVE CHANGES).

Prepaid Credit	Demo Shop	Farm Share	Items	Item			16	
		\$600 prepaid credit	1	1 item	600.0	5		
		\$400 prepaid credit	1	1 item	400.0	5		
		\$200 prepaid credit	1	1 item	200.0	5		
		Place Holder credit	1	1 item	0.0	1		

Changes to one product remain unsaved.

SAVE CHANGES **CLOSE**

Now you can go back to your order list and choose to 'edit' the credit order.

☐	DISTRIBUTOR	COMPLETED AT ▼	NUMBER	STATE	PAYMENT STATE	SHIPMENT STATE	EMAIL	NAME	TOTAL	☐
☐	Demo Shop	December 06, 2022	R512631306	● COMPLETE	● PAID	● READY	customer1@openfoodnetwork.ca	Rose Berry	\$600.00	☐

First you will need to add the 'Farm Share - Place Holder credit' to the order.

Order # R512631306

Rose Berry -

ADD PRODUCT

NAME OR SKU (ENTER AT LEAST FIRST 4 CHARACTERS OF PRODUCT NAME)

Select a variant

Q farm

Farm Share - \$600 prepaid credit (1 item)
 Producer: Demo Shop
 SKU:
 On hand: 5
 Unit: 1 item

Farm Share - Place Holder credit (1 item)
 Producer: Demo Shop
 SKU:
 On hand: 1
 Unit: 1 item

INCLUDE VARIANTS WITH NO AVAILABLE STOCK ☐

SHIP

QUANTITY	TOTAL
1	\$600.00
	\$0.00

No tracking details provided.

No note provided

Order # R512631306

×

CANCEL

Rose Berry -

ADD PRODUCT

NAME OR SKU (ENTER AT LEAST FIRST 4 CHARACTERS OF PRODUCT NAME)

Farm Share - Place Holder credit (1 item)

INCLUDE VARIANTS WITH NO AVAILABLE STOCK

☐

SELECT STOCK

ON HAND	QUANTITY
1	1

Add

+

Now you can delete the other 'credit' product from the order (adding the 'place holder credit' variant first prevents the entire order from being canceled; that step would be unnecessary if the order already contained other products)

Order # R512631306

×

CAN

Rose Berry -

ADD PRODUCT

NAME OR SKU (ENTER AT LEAST FIRST 4 CHARACTERS OF PRODUCT NAME)

Select a variant

INCLUDE VARIANTS WITH NO AVAILABLE STOCK

☐

H58587265480 - READY -

→ SHIP

	ITEM DESCRIPTION	PRICE	QUANTITY	TOTAL	
PrePaid Credit	Farm Share - Place Holder credit (1 item)	\$0.00	1	\$0.00	✎ 🗑
PrePaid Credit	Farm Share - \$600 prepaid credit (1 item)	\$600.00	1	\$600.00	✎ 🗑 Delete
Shipping: Pick-up				\$0.00	✎

Now in your orders list the order will revert to 'credit owed' for the amount of the prepaid credit.

☐	DISTRIBUTOR	COMPLETED AT ▼	NUMBER	STATE	PAYMENT STATE	SHIPMENT STATE	EMAIL	NAME	TOTAL	✎ 👤
☐	Demo Shop	December 06, 2022	R512631306	● COMPLETE	● CREDIT OWED (\$-600.00)	● READY	customer1@openfoodnetwork.ca	Rose Berry	\$0.00	

It will also look like this in your Customer List for that customer.

customer2@openfoodnetwork.ca	Sarah	Brown		Add a tag	15 Maple St.	15 Maple St.	● CREDIT OWED \$600.00	
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And if you do a Order Cycle Management - Delivery Report, it will show a positive balance for the customer.

FIRST NAME	LAST NAME	HUB	CUSTOMER CODE	PAYMENT METHOD	AMOUNT	BALANCE
Rose	Berry	Demo Shop		Pay by etransfer	0.0	600.0

And if the customer logs in to their account on OFN and goes to Transactions they will see a running balance of their account with you.

Transaction History

Demo Shop				Credit: \$600.00			
Transaction	Date	Payment status	Shipping status	Value	Outstanding balance	Running balance	
Pay by etransfer	Dec 06, 2022 09:32	Completed		\$600.00			
Order R512631306	Dec 06, 2022 09:30	Credit owed	Ready	\$0.00	-\$600.00	-\$600.00	

To apply the credit to future orders you will need to create a payment option - 'pay by credit' that customers can choose when they checkout to indicate they want you to use their credits. You can use tags if you want this payment option only available/visible to those customers that have purchased prepaid credit with you.

New Payment Method

De-activating a payment method can make the payment method disappear from your list. Alternatively, you can hide a payment method from the checkout page by setting the option 'Display' to 'back office only'.

NAME	Pay by credit
DESCRIPTION	Your order total will be taken off of your prepaid credit. You can check your remaining credit balance by logging into your <u>OFN</u> customer account and choosing 'Account' then 'Transactions'.
DISPLAY	Both Checkout and Back office
ACTIVE	☒ YES ☐ NO
TAGS	Add a tag
PROVIDER	Cash/EFT/Bank Transfer etc. (payments for which automatic validation is not required)

This is what the customer will see when they checkout.

Payment

Pay by credit

Hide

☒ Pay by credit (Free)

Your order total will be taken off of your prepaid credit. You can check your remaining credit balance by logging into your OFN customer account and choosing 'Account' then 'Transactions'.

Place order now

We now have a 2nd order place by the customer for \$48.

☐	DISTRIBUTOR	COMPLETED AT ▼	NUMBER	STATE	PAYMENT STATE	SHIPMENT STATE	EMAIL	NAME	TOTAL	
☐	Demo Shop	December 06, 2022	R316508042	● COMPLETE	● BALANCE DUE (\$48.00)	● PENDING	customer1@openfoodnetwork.ca	Rose Berry	\$48.00	 
☐	Demo Shop	December 06, 2022	R512631306	● COMPLETE	● CREDIT OWED (\$-600.00)	● READY	customer1@openfoodnetwork.ca	Rose Berry	\$0.00	 

This is what they will see if they login to their account. The negative amount means their remaining credit balance.

Transaction History

Demo Shop				Credit: \$552.00			⌵
Transaction	Date	Payment status	Shipping status	Value	Outstanding balance	Running balance	
Order R316508042	Dec 06, 2022 10:36	Balance due	Pending	\$48.00	\$48.00	-\$552.00	
Pay by etransfer	Dec 06, 2022 09:32	Completed		\$600.00			
Order R512631306	Dec 06, 2022 09:30	Credit owed	Ready	\$0.00	-\$600.00	-\$600.00	

And this is what you will see if you as a manager from your customer list.

customer1@openfoodnetwork.ca	Rose	Berry		Add a tag	25 Olive St.	25 Olive St.	● CREDIT OWED \$552.00	
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And if you run the Delivery Report.

							PRINT REPORT
FIRST NAME	LAST NAME	HUB	CUSTOMER CODE	PAYMENT METHOD	AMOUNT	BALANCE	
Rose	Berry	Demo Shop		Pay by etransfer	0.0	600.0	
Rose	Berry	Demo Shop		Pay by credit	48.0	-48.0	

IF you want to mark the new order as 'Paid' changing the payment state from 'Balance Due' to 'Paid'.

☐	DISTRIBUTOR	COMPLETED AT ▼	NUMBER	STATE	PAYMENT STATE	SHIPMENT STATE	EMAIL	NAME	TOTAL	
☐	Demo Shop	December 06, 2022	R316508042	● COMPLETE	● BALANCE DUE (\$48.00)	● PENDING	customer1@openfoodnetwork.ca	Rose Berry	\$48.00	 
☐	Demo Shop	December 06, 2022	R512631306	● COMPLETE	● CREDIT OWED (\$-600.00)	● READY	customer1@openfoodnetwork.ca	Rose Berry	\$0.00	 

You can click the green check mark to the right of the order.

(Note: You may first want to check your customer list to ensure the customer has enough 'credit owed' to cover the order cost. If they don't you can make a partial payment on the order with the 'credit owed' amount remaining and then send them an invoice for the balance on the order.)

Now the order is paid in your order list.

☐	DISTRIBUTOR	COMPLETED AT ▼	NUMBER	STATE	PAYMENT STATE	SHIPMENT STATE	EMAIL	NAME	TOTAL	
☐	Demo Shop	December 06, 2022	R316508042	● COMPLETE	● PAID	● READY	customer1@openfoodnetwork.ca	Rose Berry	\$48.00	 
☐	Demo Shop	December 06, 2022	R512631306	● COMPLETE	● CREDIT OWED (\$-600.00)	● READY	customer1@openfoodnetwork.ca	Rose Berry	\$0.00	 

But in the customer record and in your customer list the running balance will revert back to the full prepaid credit amount.

customer1@openfoodnetwork.ca	Rose	Berry		Add a tag	25 Olive St.	25 Olive St.	● CREDIT OWED \$600.00	
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My account [customer1@openfoodnetwork.ca](#)

ORDERS

CREDIT CARDS

TRANSACTIONS

ACCOUNT SETTINGS

Transaction History

Demo Shop				Credit: \$600.00		
Transaction	Date	Payment status	Shipping status	Value	Outstanding balance	Running balance
Pay by credit	Dec 06, 2022 10:47	Completed		\$48.00		
Order R316508042	Dec 06, 2022 10:36	Paid	Ready	\$48.00	\$0.00	-\$600.00
Pay by etransfer	Dec 06, 2022 09:32	Completed		\$600.00		
Order R512631306	Dec 06, 2022 09:30	Credit owed	Ready	\$0.00	-\$600.00	-\$600.00

To credit the payment on the 2nd order to the running balance of credit we must now go into that original credit order and make a negative payment in the amount of the 2nd order (i.e. - \$48).

First Edit that order.

☐	Demo Shop	December 06, 2022	R512631306	● COMPLETE	● CREDIT OWED (\$-600.00)	● READY	customer1@openfoodnetwork.ca	Rose Berry	\$0.00	
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Then choose Payments from the right side menu.

Order # R512631306

CANCEL

ACTIONS

BACK TO ORDER LIST

Rose Berry -

ADD PRODUCT

NAME OR SKU (ENTER AT LEAST FIRST 4 CHARACTERS OF PRODUCT NAME)

☐ INCLUDE VARIANTS WITH NO AVAILABLE STOCK

H58587265480 - READY -

SHIP

ITEM DESCRIPTION	PRICE	QUANTITY	TOTAL
Prepaid Credit Farm Share - Place Holder credit (1 item)	\$0.00	1	\$0.00
Shipping: Pick-up			\$0.00
No tracking details provided.			
No note provided			

ORDER ADJUSTMENTS

ORDER INFORMATION

STATUS: COMPLETE
TOTAL: \$0.00
SHIPMENT: READY
PAYMENT: CREDIT OWED
DATE COMPLETED: December 06, 2022 9:30 AM

CUSTOMER DETAILS

ORDER DETAILS

PAYMENTS

ADJUSTMENTS

RETURN AUTHORATIONS

Choose New Payment from the top right menu.

Order # R512631306 → Payments

+ NEW PAYMENT

ACTIONS

BACK TO ORDER LIST

Rose Berry -

CREDIT OWED : \$-600.00

DATE/TIME	AMOUNT	PAYMENT METHOD	PAYMENT STATUS
December 06, 2022 9:30 AM	\$600.00	Pay by etransfer	COMPLETED

ORDER INFORMATION

STATUS: COMPLETE
TOTAL: \$0.00
SHIPMENT: READY
PAYMENT: CREDIT OWED
DATE COMPLETED: December 06, 2022 9:30 AM

CUSTOMER DETAILS

ORDER DETAILS

PAYMENTS

ADJUSTMENTS

RETURN AUTHORATIONS

Enter the amount of the order paid by credit precede with a minus sign (i.e. -\$48.0) and choose 'Pay by Credit', then 'Update'.

Order # R512631306 → New Payment

Rose Berry -

AMOUNT

-48.0

PAYMENT METHOD

☒ Pay by credit

UPDATE

'Capture' that payment with the green check mark.

Order # R512631306 → Payments

+ NEW PAYMENT

Rose Berry -

CREDIT OWED : **\$-600.00**

DATE/TIME	AMOUNT	PAYMENT METHOD	PAYMENT STATUS	Capture
December 06, 2022 10:57 AM	\$-48.00	Pay by credit	● CHECKOUT	☒
December 06, 2022 9:30 AM	\$600.00	Pay by etransfer	● COMPLETED	☐

Now the 'credit owed' has been reduced by the correct amount on the credit order.

☐	Demo Shop	December 06, 2022	R512631306	● COMPLETE	● CREDIT OWED (\$-552.00)	● READY	customer1@openfoodnetwork.ca	Rose Berry	\$0.00
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And the running balance is correct in your customer list.

customer1@openfoodnetwork.ca	Rose	Berry		Add a tag	25 Olive St.	25 Olive St.	● CREDIT OWED \$552.00
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And the Delivery Report will show the up-to-date balance for the customer. The 2nd order has been paid (so it is no longer negative) and the credit or positive balance has been reduced.

PRINT REPORT

FIRST NAME	LAST NAME	HUB	CUSTOMER CODE	PAYMENT METHOD	AMOUNT	BALANCE
Rose	Berry	Demo Shop		Pay by etransfer	0.0	552.0
Rose	Berry	Demo Shop		Pay by credit	48.0	0.0

And when the customer logs into their account the running balance and credit amount will be accurate.

My account customer1@openfoodnetwork.ca

- ORDERS
- CREDIT CARDS
- TRANSACTIONS
- ACCOUNT SETTINGS

Transaction History

Demo Shop				Credit: \$552.00		
Transaction	Date	Payment status	Shipping status	Value	Outstanding balance	Running balance
Pay by credit	Dec 06, 2022 10:47	Completed		\$48.00		
Order R316508042	Dec 06, 2022 10:36	Paid	Ready	\$48.00	\$0.00	-\$552.00
Pay by credit	Dec 06, 2022 10:58	Completed		-\$48.00		
Pay by etransfer	Dec 06, 2022 09:32	Completed		\$600.00		
Order R512631306	Dec 06, 2022 09:30	Credit owed	Ready	\$0.00	-\$552.00	-\$552.00