



# A Guide to Processing Orders with Spree Commerce

How a typical retail store uses Spree to process orders (and what to do if you're not "typical").

# Background and Definitions

## Authorize/Capture

Processing a credit card payment occurs in two steps: Authorize and capture. A payment is “authorized” when the credit card company confirms that the customer has sufficient funds available. It’s “captured” when the company actually transfers the funds.

Some eCommerce platforms do the capture step automatically when authorization is confirmed. Others require the storekeeper to check each authorized order and manually confirm that they’re ready to capture funds. Manual capture is the default.

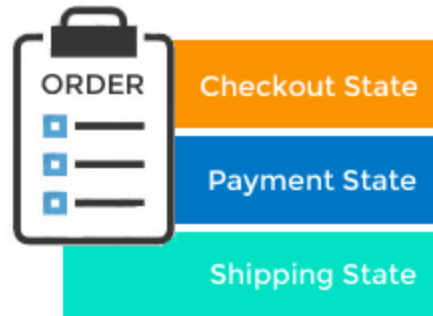
### **Should I use automatic or manual capture?**

The choice between automatic and manual capture depends on the nature of your business. If you deal in a high volume of orders that can be processed quickly and require little customer interaction, automatic capture can make your business very efficient.

If you often need to discuss orders with clients and adjust them, have long lead times before you can deliver, or need to manage stock outside of Spree, manual capture may be a better option.

# Order States

Each order in Spree has three states that define where it is in the sales process: Checkout, payment, and shipping.



## 1. Checkout State

Sometimes referred to as just “State,” it’s where the customer has gotten to.

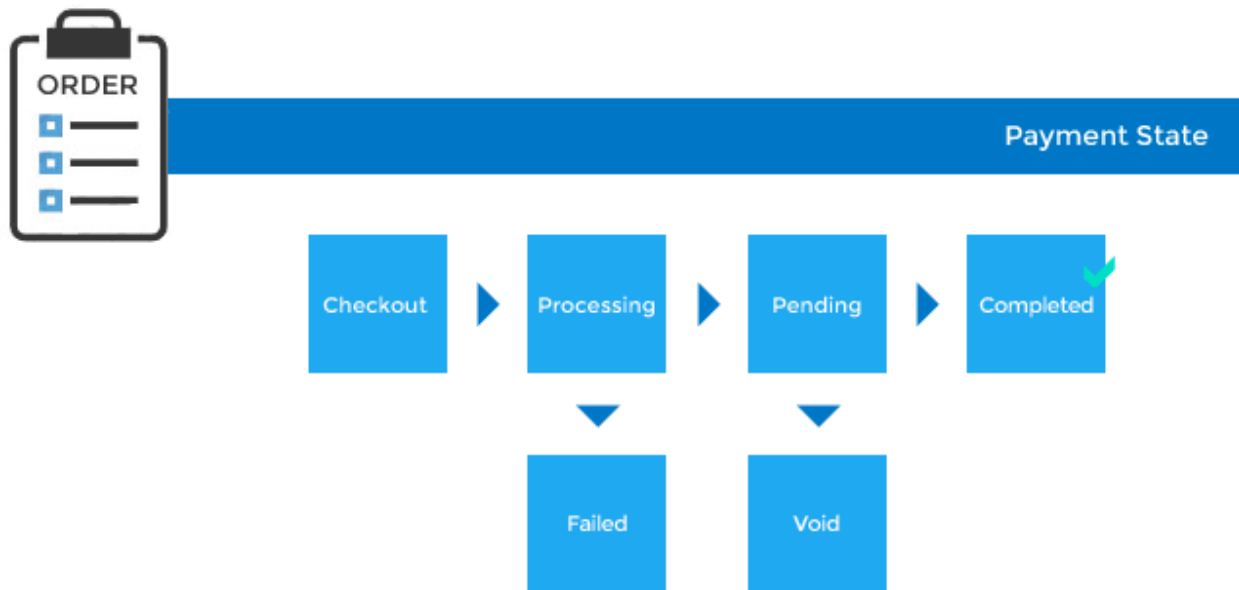


Most of these steps are about collecting information from the customer through the checkout process (note that “payment” here means collecting the customer’s credit card details or similar, not processing the payment).

When the order reaches the **complete** stage the customer has finished submitting their order. The order is sent to be authorized, and shows up in the store’s admin interface. ready for the storekeeper to handle it.

## 2. Payment State

Payment states are more complex. Orders aren't always completed in one transaction. Sometimes an order has more than one payment associated with it, most commonly if one payment is declined before another is authorized. Each payment is processed separately, and has its own independent states for Spree to track.



In this context, **checkout** means the order isn't ready to be paid yet (usually because it's still in checkout). **Processing** means it's been sent to the payment gateway for authorization. If it doesn't pass authorization it's **failed**. If it does pass, it goes to the **pending** state, awaiting a decision on whether it should be captured and become **completed**, or canceled and made **void**.

## Overall payment state (for the whole order)

The states of all payments are combined to determine the overall payment state. This is what the storekeeper sees on the main order admin page. It guides the storekeeper to what they need to do next.

Possible overall payment states for an order are

- **Balance due** when there aren't enough captured payments to meet the order total yet. This might mean that there's an authorized payment ready to manually capture, or it may be that no payment has been made yet and the customer needs to be contacted to discuss the order.
- **Paid** when the captured payments cover the order. Payment is done and it's time to ship the order.
- **Credit owed** when the captured payments add up to more than the order total, and the customer is owed a refund. This might happen if items are removed from an order after it has been paid.
- **Failed** when the most recent payment for an order is in the failed state.

### 3. Shipping State

Just as an order might have more than one payment, it might have more than one shipment. Different items might need to be shipped by different methods, or you may want to deliver stock on hand immediately while you backorder other items. For the sake of this document, however, we'll assume everything can be done in a single shipment.

Combined, the shipments determine the shipping state for the whole order, and you'll most often see the states:

- **Ready** when stock is on hand and the order can be shipped
- **Backorder** when some items need to be backordered
- **Shipped** when you've confirmed that all shipments have been made

# Processing an Order

## 1. Log in to Spree Admin

You'll be taken to the orders page. A list of completed orders shows the most recently completed at the top.

## 2. Select an order for payment

Choose an order you need to process and click on the payment state (usually "Balance Due" or "Failed" – click right on the text). This will take you straight to a page listing the payments for that order.

## 3. Capture the payment

In the most common case, there'll be an authorized payment ready to capture for the full amount of the order. Click on the checkmark button to capture the payment.

If the order has a failed payment you can edit the amount for each payment, or void it with the cross button. You can also create a new payment to record payments made in cash or credit cards outside Spree.

When the payments add up to the order total, you're done. Click on "Back to Orders List" to return to the list of orders. The Payment State for your order has changed to "Paid."

## 4. Select an order for shipping

From the Orders list, click on the edit button. This will take you to the main order edit page. You can edit the order, add or remove products, apply discounts or extra charges (adjustments) and change shipping details.

## 5. Ship

You should see something like "[Code number] Ready Package From [Stock location]" and a SHIP button. Click on SHIP, and the order will be recorded as shipped. Click on "Back to Orders List" to return to the list of orders, and you'll see the Shipment State for your order has changed to "Shipped."



# Learn more

Like every eCommerce platform, Spree is designed around certain assumptions about how a “typical” business processes orders. Often this means little or no customization is required. But for other businesses, particularly those with a bricks-and-mortar legacy, the customizations may be extensive.

The key is finding the right balance between customizations (with their initial and long-term costs) and your ability to modify business processes to better align with Spree’s model whenever possible. If you have comments, questions or would like to discuss your project please get in touch.



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