

Orders Guide: From Cart to Completed Order

Daily Operations | Counter staff and managers

Work the full order lifecycle in FlintPOS: create the cart, finish checkout, find the order later, collect open balances, print paperwork, and move quotes, pickups, deliveries, and portal requests to completion.

What This Guide Helps You Do

- Move cleanly between cart work, order management, and corrections.
- Use the Orders page as the operational hub after checkout.
- Handle quotes, portal requests, pickups, and unpaid orders without guessing.

MOVE FROM CART WORK TO ORDER FOLLOW-UP

The POS page is where you build the transaction. The Orders page is where you manage what already exists. Once the sale is created, staff should stop trying to recreate it from memory and instead use the saved order record.

- Use POS to build the cart and collect the payment or delivery details.
- Use Orders to find, review, print, email, edit, refund, or complete the order later.
- Use one saved order as the source of truth instead of keeping parallel notes.

FIND THE RIGHT ORDER FAST

Use search, status filters, type filters, and date ranges together. Start broad, then narrow. For example, search by order number or customer name first, then filter to delivery or unpaid if needed.

1 Search by the most stable identifier

Order number is best. Customer name or phone works when the customer is standing with you.

2 Use status and type to narrow the list

Separate quotes, deliveries, complete sales, and portal requests instead of scrolling a mixed queue.

3 Open the detail pane before acting

Check balance, payment history, notes, and status before printing, refunding, or voiding.

USE THE ORDER RECORD FOR QUOTES, PICKUPS, AND REQUEST APPROVALS

FlintPOS keeps these flows on the same order so staff can move work forward without rebuilding anything from scratch.

1 Accept quotes from the saved quote record

Only quote orders can be accepted. Use Accept Quote and choose the live type you need instead of creating a new sale by hand.

2 Approve portal requests from the Requests tab

Delivery approvals can include earliest date, latest date, and a time window. Will-call approvals mark the order ready and notify the customer by email.

3 Mark will-call pickup complete only after release

Approval means the order is ready. Mark pickup complete after the goods leave and yard staff finish the order.

DAILY ORDER TASKS AFTER CHECKOUT

The common follow-up jobs are collecting a remaining balance, printing a receipt or slip, emailing the customer, and updating the order type or status as the work moves forward.

- Use the payment action when an order was left unpaid or COD.
- Use the print actions for receipts, slips, or invoices instead of manual summaries.
- Use send receipt when the customer wants a copy later or a field contact needs the paperwork.

SPECIAL FLOWS THAT NEED DELIBERATE HANDLING

Quotes, pickups, and portal requests are not edge cases in FlintPOS. They are built-in flows and should be handled with the same order record instead of creating replacement orders.

- Accept a quote as sale or delivery when the customer is ready to proceed.
- Mark will-call pickup complete when the goods leave your yard.
- Approve or deny portal requests from the requests tab so the customer gets a system-driven answer.

CORRECTIONS BELONG ON THE ORDER RECORD

Choose refund, void, discard, or delete based on the event you need to correct. A second sale or an off-book note will leave the records wrong.

- Void is for stopping an order while keeping the history and the reason.



- Delete is admin-only and permanent. FlintPOS asks for confirmation because it cannot be undone.
- If an order still needs follow-up instead of removal, leave it in the system and use the correct status or payment workflow.

Manager control

Void, delete, and write-off actions should be restricted and documented because they change financial history.

Keep Going

Use the FlintPOS Docs hub to search for related guides by role, category, or job to be done. Open the interactive walkthrough at </quickstart/order.html> when you want a screen-by-screen visual refresher.