LULU STEP-BY-STEP GUIDE

# Set up pre-orders with Presale Pre-orders

For store owners: install the Presale Pre-orders app, build a pre-order campaign (products, when the Pre-order button shows, ship date, full payment or a deposit), publish it, see what shoppers see, collect the remaining balance and place a test order to check it all works.

For: Everyone · About 14 minutes · 13 steps · Updated November 20, 2026

**Before you start** You need access to Orders and Products in your store admin, and at least one active product to put on pre-order. Pre-orders are not built in: they come from the Presale Pre-orders app in the App Store (handle `presale-preorders`). Until the app is installed and a campaign is published, nothing changes on your storefront. Taking a deposit (split payment) and giving a pre-order discount need the app's Growth plan or higher; the Launch plan sells pre-orders at the full price.

## Steps at a glance

1. Install Presale Pre-orders
2. Get your products ready
3. Create a campaign
4. Choose the products
5. Set the rules: when Pre-order shows, dates and limits
6. Set the expected ship date
7. Choose how much shoppers pay at checkout
8. Customise the wording and mixed carts
9. Publish the campaign
10. Set reminders and other defaults
11. Know what shoppers see
12. Track pre-orders and collect the balance
13. Place a test order

STEP 1

## Install Presale Pre-orders

Open the App Store in your admin and find Presale Pre-orders, or go straight to `/admin/app-store/presale-preorders`. Click “Install”. A window shows what the app can access and what it costs; click “Install” again to confirm. Installing a paid app starts its free trial, and a message tells you when the trial ends. Once it is installed, “Pre-orders” appears under Orders in the left menu (`/admin/presale`).

- Before the app is installed, the Pre-orders page only shows “View in the App Store”.
- Plans: Launch sells pre-orders at the full price. Growth adds split payments (a deposit now, the rest later, or nothing now) and pre-order discounts. Scale adds “Advanced reporting”. Each plan has its own “Pre-orders a month” limit.
- Use “Start free trial” or “Choose plan” on the app's page to move to another plan.

STEP 2

## Get your products ready

A campaign can only cover active products. If you want Pre-order to show only once a product sells out, that product's inventory must be tracked and must not keep selling at zero: on the product page, in the “Inventory” card, turn on “Inventory tracked” and leave “Continue selling when out of stock” unticked. The Pre-order button then takes over when the quantity reaches 0.

- If a product keeps selling when out of stock, or its quantity is not tracked, it never counts as sold out. Choose “Always, whatever the stock level” for it instead (see step 5).
- On the product page, “Manage pre-orders in Presale” takes you to the Pre-orders page.

STEP 3

## Create a campaign

Go to Orders → Pre-orders and click “Create campaign”. Under “Basics”, type a “Campaign name”, for example Spring drop. The name labels the campaign in reports and on each order, and on the product page it is also the name of the pre-order option shoppers pick, so give it a name shoppers can read. Fill in the panels below (steps 4 to 8), then click “Create campaign”. The campaign is saved as a Draft and its page opens. Nothing changes on your storefront until you publish it.

- “Coming soon” shows a badge and a notify-me form instead of a buy button. It lasts until the campaign’s Starts date, when pre-orders open by themselves (checked every 15 minutes). With no start date, nothing can be bought until you turn it off. Use it to build interest before a launch.

STEP 4

## Choose the products

In the “Products” panel, click “Choose products”, search for products in the “Add products to this campaign” window and add them. They appear as chips, and you can remove one with ×. To put the whole catalogue on pre-order (a store-wide back-order), tick “Every product” instead.

- Every variant of a chosen product is covered. You can't pick single variants here.
- A unit cap applies to the whole campaign, not to each variant.

STEP 5

## Set the rules: when Pre-order shows, dates and limits

In the “Rules” panel, under “When Pre-order shows”, choose one option. “Only when out of stock”: Pre-order replaces Sold out when stock reaches 0, and Add to cart comes back when you restock. “Always, whatever the stock level”: Pre-order replaces both Add to cart and Sold out. “Only while stock lasts”: each pre-order uses up a unit of your stock when it is sold, so the offer closes when the stock runs out. Then set “Starts” and “Ends” if you want a fixed window. If you leave Starts blank, the campaign opens when you publish. If you leave Ends blank, it stays open until you end it.

- “Total units” caps how many units the whole campaign can sell. Leave it blank for no limit. Checkout refuses the unit that would go over the cap.
- “Per customer” caps how many units one shopper can pre-order, counted across all of that shopper's orders in this campaign.
- For “Only when out of stock” and “Always, whatever the stock level”, the stock you hold isn't reserved when a pre-order is placed.

STEP 6

## Set the expected ship date

In the “Shipping” panel, choose “Exact date” and pick a “Shipping date”, or choose “To be finalised” if you don't have a date yet. Shoppers then see “Ship date to be confirmed”. You can also add a “Ship note”, for example Ships in 2–3 weeks. It is shown with the date, or on its own when the date is to be finalised. The estimate appears under the buy button, in the cart and on the order.

- “Hold these orders from fulfillment” (on by default) keeps pre-orders out of your Unfulfilled queue until they are ready. Held orders are listed in Orders under the “On hold” tab.
- “Release the hold on the ship date” (on by default) releases the hold automatically on the shipping date. If you turn it off, or the date is “To be finalised”, you release each order yourself.
- If you later move a live campaign's ship date to a later day, Lulu updates the orders already taken and emails the affected shoppers the new date.

STEP 7

## Choose how much shoppers pay at checkout

In the “Billing” panel, choose “Full amount” to charge everything at checkout, or “Split payment” to charge part now and the rest later. With “Split payment”, type the “First charge” as a percentage (“% of the price”). Enter 0 to take nothing now. A deposit is always a percentage; there is no fixed-amount deposit. Then choose “When to charge the rest”. “When you fulfil the order”: the balance falls due when the fulfillment hold releases. “On a specific date”: pick a “Balance date”. “A set time after checkout”: enter the number of “Days after checkout”.

- “Split payment” and “Pre-order discount” need the Growth plan or higher. On a lower plan, the Billing panel shows “Split payment” switched off with a “Growth plan” label and an upgrade line before you save, and a banner names the locked feature.
- “Pre-order discount” takes a percentage off the price (0 to 90) as a reward for ordering early. 0 means the normal price.
- Lulu never charges a saved card for the balance. When the balance falls due, the shopper gets an email with a link to pay it through your normal checkout, and you can send that request yourself at any time (step 12).
- Shipping, tax and tips are always charged in full at checkout. Only the product price is split.

STEP 8

## Customise the wording and mixed carts

In the “Customisation” panel you can type your own “Button text” and “Badge text” (left blank, they use the defaults from Pre-orders → Settings, and then the standard “Pre-order”). Under “Mixed carts”, choose “Allow” to let shoppers buy in-stock items and pre-orders together (the whole order waits for the pre-order), or “Pre-orders only” so that a cart with a pre-order holds nothing else. “Countdown” adds a clock to the Pre-order launch banner section. The “Preview” box beside the fields shows the badge, the button and the payment and shipping lines.

- Your Button text replaces “Pre-order” on the product page buy button and the sticky bar; your Badge text replaces the “Pre-order” chip on product cards and the pre-order option on the product page, and also shows on the Coming soon chip and launch banner. Long text is shortened with “…”. Shoppers browsing in another language keep the translated “Pre-order”.
- Set defaults for new campaigns under Pre-orders → “Settings” → “Default storefront copy”.

STEP 9

## Publish the campaign

On the campaign's page, click “Publish”. If the start date is in the future, the campaign becomes Scheduled and goes live on its own on that date. Otherwise it is Live straight away. If something is missing, a red banner says “Fix the highlighted fields, then publish.” and each field shows what to fix.

- Once the campaign is live, edits apply only to new pre-orders. Orders already placed keep the terms they were sold on.
- “End campaign” stops new pre-orders and leaves the orders already placed as they are. An ended campaign shows “Reopen”.
- “Delete” removes the campaign. Pre-orders it already took, and their holds and balances, stay in Commitments.
- The page header shows the status (Draft, Scheduled, Live or Ended), the “Campaign ID” and the units sold.

STEP 10

## Set reminders and other defaults

Go to Pre-orders → “Settings” (`/admin/presale/settings`). Under “Balance reminders”, “Remind this many days before” takes a comma-separated list. The default `3, 0` sends one reminder three days before the balance is due and one on the day. “Chase an overdue balance after” (default 3 days) sends one overdue email. Each shopper gets each reminder once. Under “Delay notice”, the “Extra line” is added to the email shoppers get when you move a ship date later. Click “Save”.

- These reminders cover balances due on a date (“On a specific date” or “A set time after checkout”). A balance due when the order ships is requested in the “ready to ship” email sent when the hold releases.
- Lulu checks for due campaigns, holds and reminders every 15 minutes. “Run now” on the Pre-orders page runs that check straight away.
- Emails go out only if your store's email sending is set up.

STEP 11

## Know what shoppers see

On a covered product, under “Purchase options”, shoppers see an option named after your campaign with a “Pre-order” tag. Under it is a payment line such as “Pay 30% now, rest when it ships” or “Pay in full now”, and a shipping line such as “Ships by 12 Nov 2026”. The buy button reads “Pre-order”. When few units are left on a capped campaign, it also says “Only 3 left for pre-order”. In collections and search, a sold-out product that can still be pre-ordered shows a “Pre-order” chip instead of Sold out.

- Cart and checkout: each pre-order line reads “Pre-order · Ships by … · … due later”. With a deposit, checkout shows “Due today” and “Due later”.
- Checkout asks the shopper to tick a box confirming what is charged today and when the rest is due. The order can't be placed until it is ticked.
- The pay button reads “Pay” plus today's amount, or “Place pre-order” when nothing is due today.
- A “Coming soon” campaign shows a “Coming soon” chip (or your Badge text), a “Launches …” date if you set a start date, and a notify-me form instead of the buy button.
- Optional: in the theme editor, add the “Pre-order launch banner” section and enter the Campaign ID to show the ship date, a countdown and a notify-me form.

STEP 12

## Track pre-orders and collect the balance

The Pre-orders page shows “Units on pre-order”, “Pre-order orders”, “Collected”, “Balance outstanding” and “Overdue”, plus a “Fulfil next” list and your “Campaigns”. “All commitments” opens the Commitments page, with one row per pre-ordered line. You can filter by “On hold”, “Balance due” or “Overdue”, use “Release” to free a hold, use “Collect payment” to open the order, and download everything with “Export CSV”. An order that has paid its deposit has the payment status “Partially paid” and is listed under the “Unpaid” tab in Orders.

- On the order page, a card shows “Balance due”, “Payment received” and “Due”. “Collect payment” emails the shopper a link to pay the balance. It doesn't charge anything by itself.
- The shopper pays from their order status page with “Pay balance”. The button appears only if the order was paid through a redirect payment gateway that is still switched on in your store. Orders paid by card (Stripe), PayPal, bank transfer or cash on delivery can't pay the balance online. Collect that money yourself and record it with “Mark as paid”.
- “Edit due date” changes when the balance is due. Leave the date blank to make it due when the order ships.
- When the whole balance is in, the card shows “Paid in full”.

STEP 13

### Place a test order

Publish a test campaign on one product, for example “Only when out of stock” on a product whose tracked quantity you set to 0, with an exact ship date. Open the product on your storefront in a private window. Check the “Pre-order” button and the shipping and payment lines, add it to the cart, tick the confirmation box at checkout and pay with a payment method in test or sandbox mode, or with a manual method such as cash on delivery. Then check the admin: the order is on hold under the “On hold” tab and appears on the Pre-orders page and in Commitments.

- To test a deposit, use a campaign with “Split payment” (Growth plan or higher) and pay with a redirect gateway in sandbox mode. Check that the order shows “Partially paid”, then click “Collect payment” and pay the balance from the link in the email.
- To test a full-payment pre-order on any plan, use “Full amount”.
- When you're done, cancel and refund the test order, end or delete the test campaign, and put the product's stock back.

## Check your work

- Presale Pre-orders is installed and “Pre-orders” shows under Orders.
- You are on the Growth plan or higher if you want a deposit or a pre-order discount.
- Products set to “Only when out of stock” have “Inventory tracked” on and “Continue selling when out of stock” off.
- The campaign has products (or “Every product”), a ship date or a ship note, and a valid billing setup.
- The campaign shows Live (or Scheduled) after you click “Publish”.
- A covered product shows the “Pre-order” button with a shipping and payment line.
- Balance reminders and the delay notice are set under Pre-orders → “Settings”.
- A test order was placed, held, listed in Commitments and, for a deposit, collected with “Collect payment” or “Mark as paid”.

## Troubleshooting

**Publishing fails with “Fix the highlighted fields, then publish.”**

Fix the message shown under each field: “Choose the products this campaign covers, or turn on “Every product”.”, “Set the expected ship date, or write a note explaining that it is still to be finalised.”, “Choose the date the rest is charged.”, “Enter how many days after checkout the rest is charged.”, “The end date must be after the start date.” or “The balance falls due after the ship date — collect it before you ship.” If it says “This campaign’s end date has already passed. Move it before publishing.”, change or clear “Ends”.

**I can't select “Split payment” or set a pre-order discount.**

Deposits, pay-later and pre-order discounts need the Growth plan or higher. On a lower plan the option is switched off with a “Growth plan” label from the start. Change your plan on the app's App Store page, then return to the campaign. On Launch you can still publish with “Full amount”.

**The product page doesn't show the Pre-order button.**

Check four things. The campaign must be Live: Draft, Scheduled and Ended campaigns offer nothing, and a “Coming soon” campaign shows Coming soon instead until its Starts date (or until you untick Coming soon and save). Today must fall between “Starts” and “Ends”. The product must be in the campaign and active. With “Only when out of stock”, the product must actually be sold out, meaning “Inventory tracked” is on, “Continue selling when out of stock” is off and the quantity is 0. A product that is in stock keeps its normal Add to cart. Also check that “Total units” hasn't been reached.

**I changed the Button text but the product page still says “Pre-order”.**

Check that the campaign is published and live (not Coming soon) and that the product is in it. Custom text only shows to shoppers browsing in the store's default language; other languages keep the translated “Pre-order”. Reload the page after saving.

**A shopper sees “This item is back in stock — remove the pre-order line and add it normally”.**

The campaign uses “Only when out of stock” and the product was restocked after the shopper added it. They need to remove the pre-order line and add the product again at the normal price.

**A shopper sees “Pre-order items in this campaign are purchased on their own — remove the other items to continue”.**

The campaign's “Mixed carts” is set to “Pre-orders only”. The shopper has to buy the pre-order in its own order, or you can switch the campaign to “Allow”.

**Checkout says “Pre-order sold out”, “You can pre-order up to … of this item” or “Pre-orders are temporarily unavailable”.**

The first means the campaign's “Total units” cap is reached. The second is the “Per customer” limit. The third means your plan's monthly pre-order allowance is used up; move to a bigger plan or wait for the next month.

**Checkout says “Pay-later instalments aren’t available for pre-orders” or “Instalment plans aren’t available for pre-orders”.**

Buy-now-pay-later rails and bank instalment plans can't be combined with a deposit or pay-later pre-order. The shopper needs to pick another payment method, or you can use “Full amount” billing for that campaign.

**Checkout says “Please confirm the payment schedule to continue.”**

Every cart with a pre-order asks the shopper to tick the box that states what is charged today and when the rest is due. The order can't be placed until they tick it.

**“Collect payment” shows an error, or the button is greyed out.**

The order needs a customer email; add one to the order first. If it says “Could not send the payment request — check Settings → Notifications”, your store's email sending isn't working. “There is nothing left to collect on this order” means the balance is already paid, and canceled orders can't be collected.

**The shopper has no “Pay balance” button on their order page.**

Shoppers can pay the balance online only for orders paid through a redirect payment gateway that is still switched on in your store. If the order was paid by card (Stripe), PayPal, bank transfer or cash on delivery, the page says “The store will contact you when the balance is due.” Collect the money yourself and click “Mark as paid” on the order.

**Balance reminders were not sent.**

Reminders go only for balances due on a date, at the days set in “Remind this many days before”, and each one is sent once. A balance due when the order ships is requested in the ready-to-ship email when the hold releases. The check runs every 15 minutes, and “Run now” on the Pre-orders page runs it straight away. Your store's email sending must be set up.

**Pre-orders stay on hold after the ship date.**

Holds release automatically only when the campaign has an exact “Shipping date” and “Release the hold on the ship date” is on. Otherwise click “Release” in Commitments, or “Release hold” on the order page.

Need a hand? Contact support at https://lulu.us.com/contact. Screenshots use demonstration accounts; personal details were replaced.