



Order Management: Editing Standard Orders

v 1.0

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Editing a Standard Order

Exigo allows the ability to Edit Orders. However, use caution when Editing an Order in Accepted, Printed, or Shipped Status.

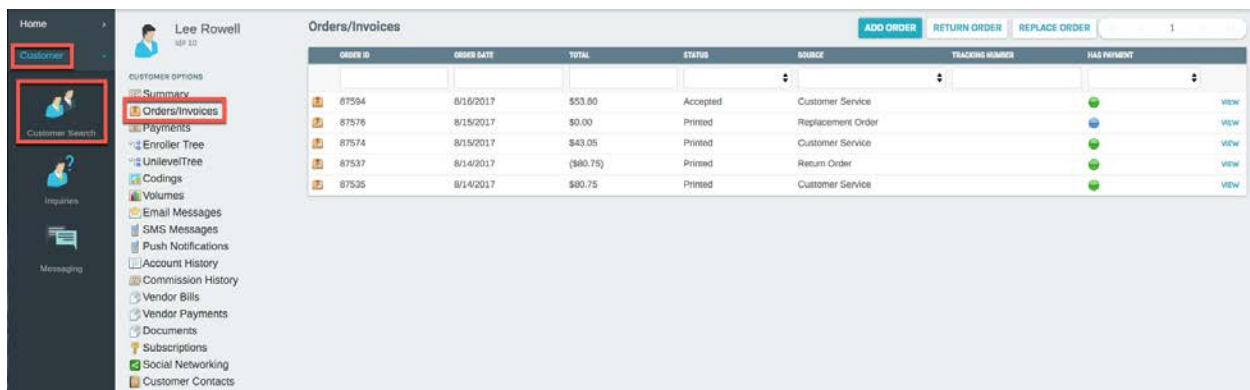
Edits may have unintended effects on other areas of the system.

If an Order is Edited, the Order Calculation Engine will recalculate the Order which may result in changes to taxes, shipping, etc.

To begin the process of Editing a Standard Order, navigate to the following:

Customer > Customer Search > Customer Record > Orders/Invoices

A list of Orders will be displayed as shown below:



The screenshot displays the 'Orders/Invoices' page for customer Lee Rowell. The left sidebar contains a navigation menu with 'Orders/Invoices' highlighted. The main content area shows a table of orders with the following data:

ORDER ID	ORDER DATE	TOTAL	STATUS	SERVICE	TRACKING NUMBER	HAS PAYMENT	
87594	8/16/2017	\$53.80	Accepted	Customer Service			VIEW
87576	8/15/2017	\$0.00	Printed	Replacement Order			VIEW
87574	8/15/2017	\$43.05	Printed	Customer Service			VIEW
87537	8/14/2017	(\$80.75)	Printed	Return Order			VIEW
87535	8/14/2017	\$80.75	Printed	Customer Service			VIEW

To edit a Standard Order, click on the appropriate Order.


The following window will be displayed:

Order Number 87594 Accepted

EDIT ORDER
RMA
CHANGE STATUS ▾
COMMISSIONS
HISTORY

Invoice Details

Invoice 1 🖨️ 🚚 📦 📄 📅


87594


: Ground 3-5 Days

To	Order Info
Lee Rowell 130 McCormick Ave Costa Mesa, CA 92626-3316	Order No.: 87594 Order Type: Customer Service Shipping Method: Ground 3-5 Days Customer ID: 10 Customer Name: Lee Rowell Sales Tax ID: Date: 8/16/2017 8:59:46 AM -05:00 Email: leer@exigo.com Phone: 4698654984 Created By: leer Fulfilled By:

Payment Info

Payment Date: 8/16/2017 9:00:27 AM -05:00
 Payment Method: Cash
 Payment Amount: \$53.80
 Payee Name

Quantity	ItemID	Description	Price	Total
1	10-S002-01	MentaFocus	\$44.95	\$44.95
			Subtotal:	\$44.95
			Shipping:	\$4.99
			Taxes:	\$3.86
			Total:	\$53.80
			Amount Paid:	\$53.80


87594

CLOSE

This screen displays the Invoice for the Order Template.

SHIP TO TAB

To continue click on "Edit Order".

The following screen will be displayed:

Order Detail #87594

- Ship To**
- Items
- Ship Method
- Payment

Choose an address to Ship the Order to:

Shipping Address
Lee Rowell
130 McCormick Ave
Costa Mesa CA 92626-3316
[EDIT](#) [CHECK](#) Verified

Mailing Address
Lee Rowell
5427 W Flight Ave
Santa Ana CA 92704-1815
[EDIT](#) [CHECK](#)

Drop Ship Address

Country United States ▼

Company _____

First Name Lee

Last Name Rowell

Address 130 McCormick Ave

City Costa Mesa California ▼ 92626-3316
[CHECK](#) Verified

Email leer@exigo.com

Phone 4698654984

[CANCEL](#) [SAVE CHANGES](#)

Any needed changes to the Ship To Address may be made from this screen.

If you are only editing the Ship To Address, don't forget to click on "Save Changes" prior to closing screen. Otherwise, continue to the next tab for additional Edits.

ITEMS TAB

Click on the Items Tab to move forward.

The following window will be displayed:

Order Detail #87594

Ship To
Items
Ship Method
Payment

Warehouse **Main NMI**

Currency **Dollars (US)**

Price Type **Wholesale**

ADD ITEM
REMOVE ALL ITEMS

QTY	ITEM CODE	DESCRIPTION	PV	CV	RETAIL COMMISSION	PREFERRED COMMISSION	PACK LEVEL 1	PACK LEVEL 2	PACK LEVEL 3	PRICE EACH	TOTAL	
1	10-S002-01	MentaFocus	\$39.00	\$39.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$44.95	\$44.95	EDIT

SubTotal: \$44.95

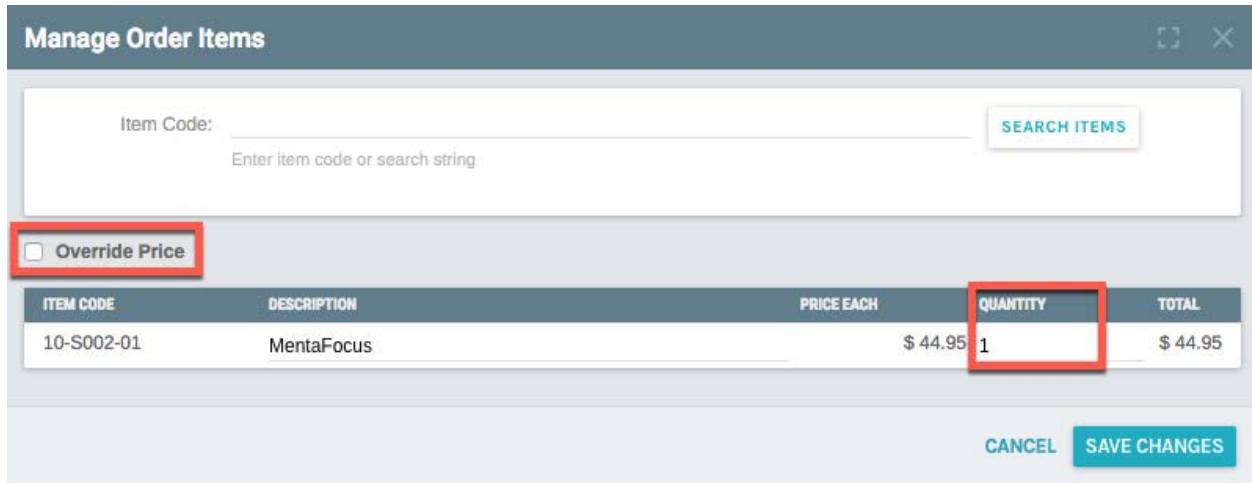
PV: \$39.00

CV: \$39.00

CANCEL
SAVE CHANGES

To Edit the Item currently on the Order – including quantity, price, volume, etc., click on Edit.

The following screen will be displayed:



Manage Order Items

Item Code: SEARCH ITEMS
Enter item code or search string

Override Price

ITEM CODE	DESCRIPTION	PRICE EACH	QUANTITY	TOTAL
10-S002-01	MentaFocus	\$ 44.95	1	\$ 44.95

CANCEL SAVE CHANGES

To Edit the Quantity, simply type in the new quantity.

To Edit the Price or Volumes, click the checkbox next to “Override Price”. This will open the following window:

Manage Order Items [] [X]

Item Code: SEARCH ITEMS
Enter item code or search string

Override Price

ITEM CODE	DESCRIPTION	PRICE EACH	QUANTITY	TOTAL
10-S002-01	MentaFocus	44.95	1	\$ 44.95

Item Price Details / Override

Tax On Price:	44.9500
Ship On Price:	44.9500
PV:	39.0000
CV:	39.0000
Retail Commission Each:	0.0000
Override PriceTy Each:	0.0000

CANCEL
SAVE CHANGES

To Edit, type in the new amount for any of the fields listed.

NOTE: This only changes this information on this Order. There will be no effect to the general setup of the Item or any other existing Orders or Recurring Orders.

Click "Save Changes".

Clicking "Save Changes" returns the following window:

Order Detail #87594

Ship To | **Items** | Ship Method | Payment

Warehouse: Main NMI
Currency: Dollars (US)
Price Type: Wholesale

ADD ITEM | REMOVE ALL ITEMS

QTY	ITEM CODE	DESCRIPTION	PV	CV	RETAIL COMMISSION	PREFERRED COMMISSION	PACK LEVEL 1	PACK LEVEL 2	PACK LEVEL 3	PRICE EACH	TOTAL	
1	10-S002-01	MentaFocus	\$39.00	\$39.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$44.95	\$44.95	EDIT

SubTotal: \$44.95
PV: \$39.00
CV: \$39.00

CANCEL SAVE CHANGES

From the Items Tab, you also have the ability to Add a New Item and/or Remove All Items by clicking on the appropriate button. Clicking on Add Item will open the Item Search window.

If this completes your Edits, don't forget to click "Save Changes" and move to the next tab.

SHIP METHOD TAB

To Edit the Ship Method, Click the "Ship Method" tab.

The following window will be displayed:

Order Detail #87594

Ship To | **Items** | **Ship Method** | Payment

Ship Method Ground 3-5 Days \$4.99

Pickup Name Lee Rowell

Instructions/Notes Notes

[CANCEL](#) [SAVE CHANGES](#)

To make an Edit, click on the new Ship Method to be used. If this completes your Edits, don't forget to click "Save Changes" and proceed to the next Tab.

PAYMENT TAB

Clicking on the Payment Tab displays the following window:

Order Detail #87594

[Ship To](#) | [Items](#) | [Ship Method](#) | **[Payment](#)**

[ADD PAYMENT](#)

[ACCOUNT](#) | [SHIPPING](#) | [TAX](#) | [CHANGE STATUS](#)

TYPE	ACCOUNT	AMOUNT	
Cash		\$53.80	EDIT DELETE

SubTotal \$44.95

Tax \$3.48

Shipping \$4.99

Total \$53.80

FreeCreditItem

ExactorCalculate Date
64926662-22f4-4ad4-944b-e921d4fb5676

Transfer Order Volume To Customer ID

Order Status **Accepted**

Order Type **Customer Service**

Order Date 8/16/2017 8:59:46 AM

Last Modified 8/16/2017 9:01:00 AM -05:00

Modified By leer

Created By leer

Supress packing slip price
Do not display the price on the invoice

IsCommissionable

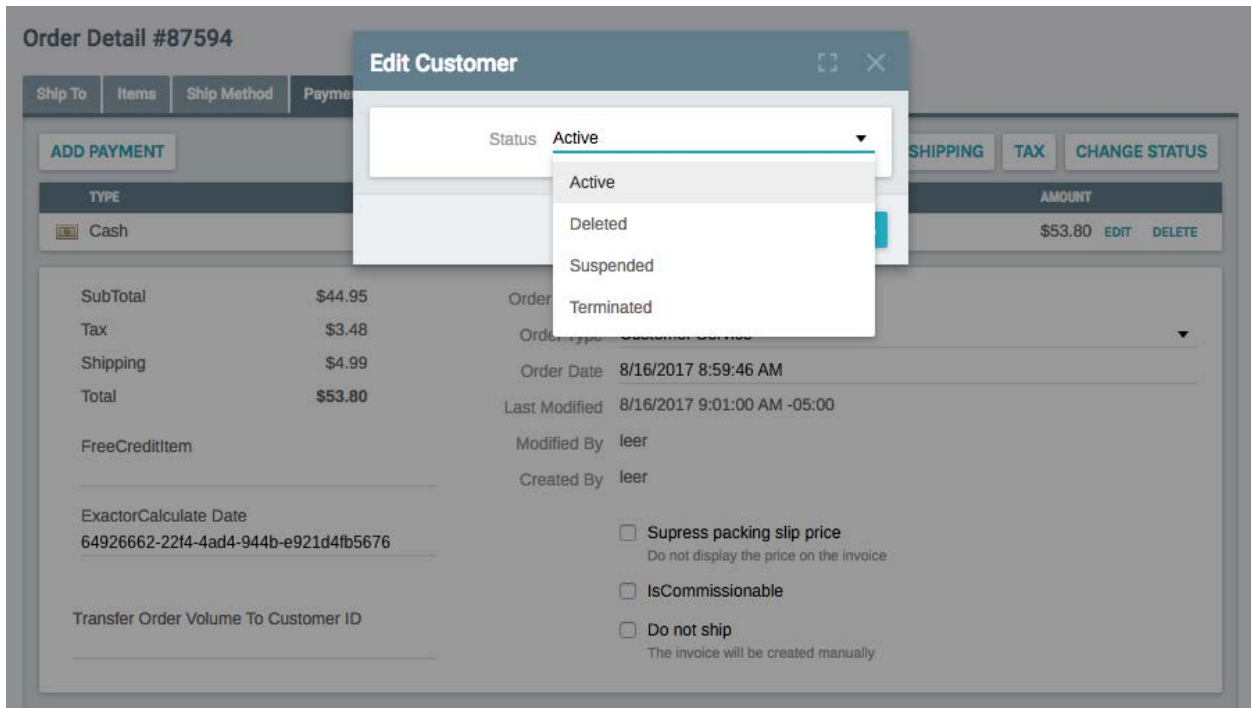
Do not ship
The invoice will be created manually

[CANCEL](#) [SAVE CHANGES](#)

This window allows the ability to update the Account, Shipping, Tax, Order Status, and Payment Information.

ACCOUNT TAB

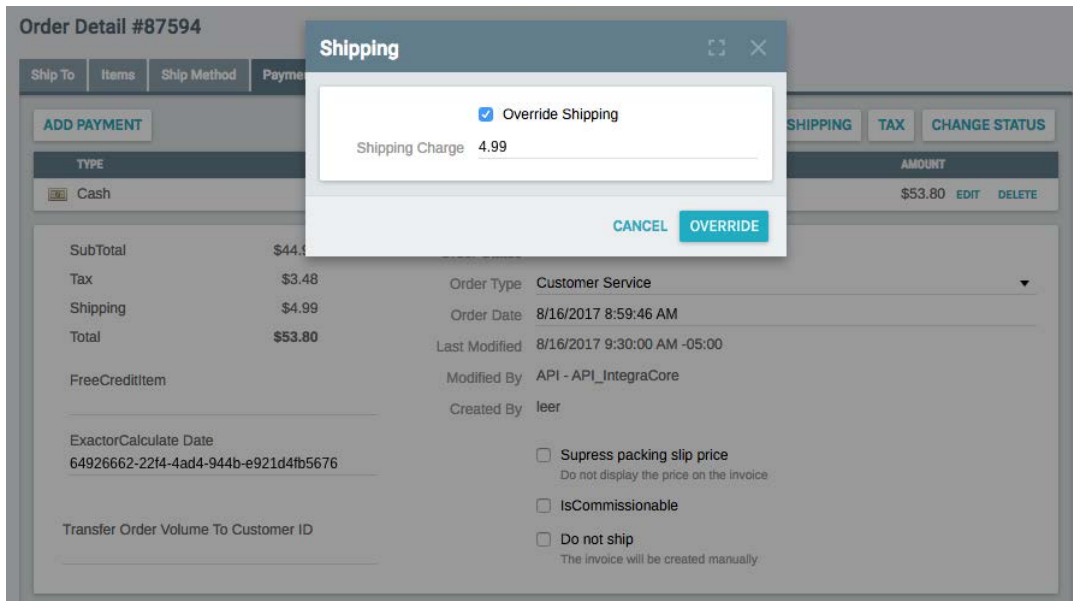
Clicking on the Account Tab will open the following window:



This window allows the Customer Status to be changed.

To make a change, click on the new status from the drop down window and click "Save Changes".

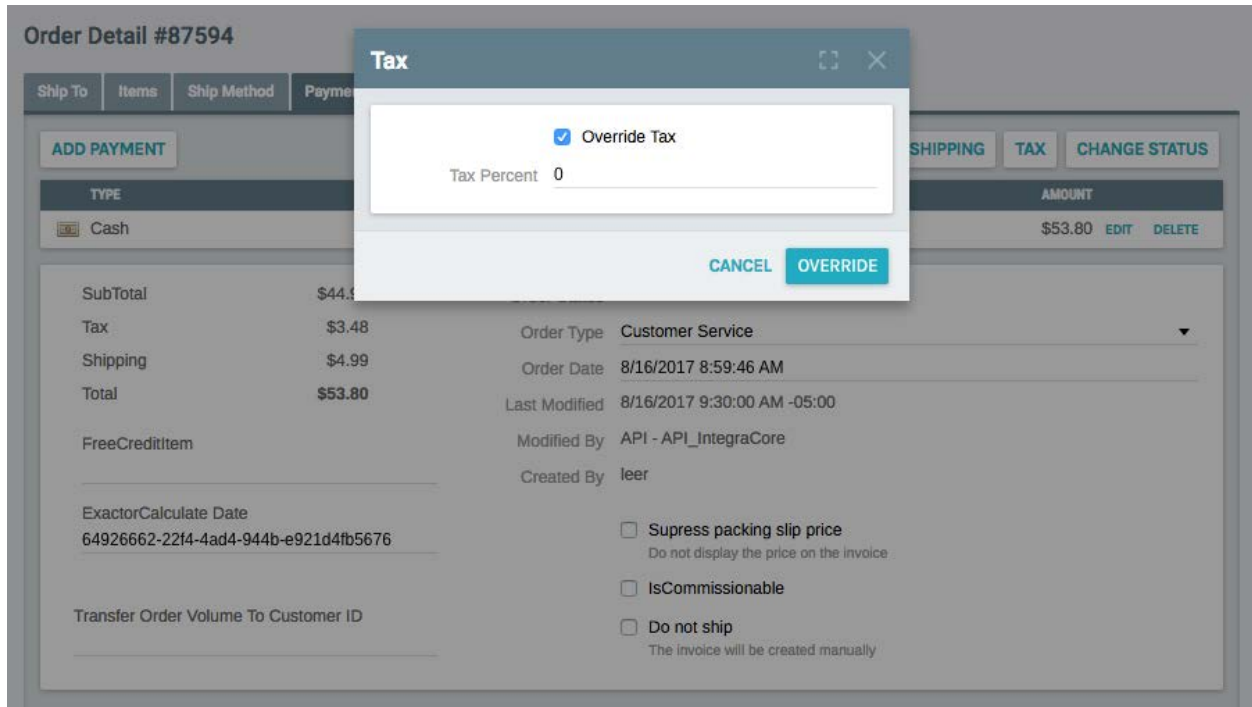
Clicking on the Shipping Tab displays the following window:



From this window, Shipping may be Overridden. Simply type in the amount you would like to charge for Shipping and click on "Override".

TAX TAB

Clicking on the Tax Tab will display the following window:



The screenshot displays the 'Tax' window for Order #87594. The window is titled 'Tax' and has a close button. It contains a checked checkbox for 'Override Tax', a text input field for 'Tax Percent' with the value '0', and 'CANCEL' and 'OVERRIDE' buttons. The background shows order details for Order #87594, including a table of charges (SubTotal, Tax, Shipping, Total) and order metadata.

TYPE	AMOUNT
Cash	\$53.80

SubTotal	\$44.4
Tax	\$3.48
Shipping	\$4.99
Total	\$53.80

Order Type: Customer Service
Order Date: 8/16/2017 8:59:46 AM
Last Modified: 8/16/2017 9:30:00 AM -05:00
Modified By: API - API_IntegraCore
Created By: leer

ExactorCalculate Date: 64926662-22f4-4ad4-944b-e921d4fb5676

Transfer Order Volume To Customer ID

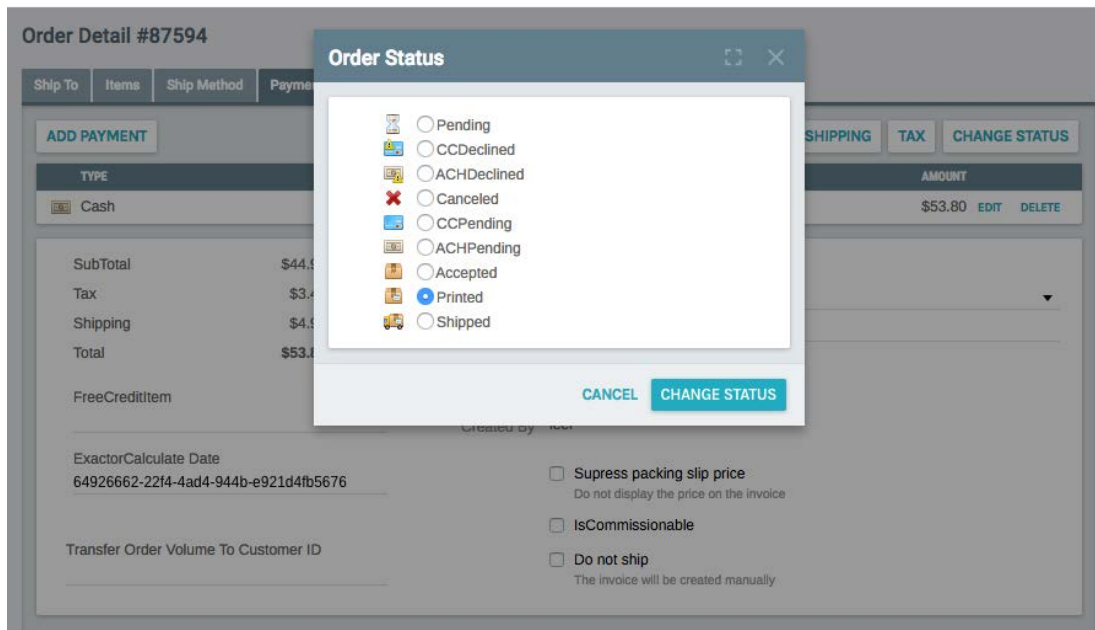
Suppress packing slip price
Do not display the price on the invoice

IsCommissionable

Do not ship
The invoice will be created manually

From this window, the Tax amount may be changed by entering the Tax Percent you would like to charge on the Order. Once the new Tax Percent has been entered, click on "Override" to save the change.

Clicking on Change Status will display the following window:



This window allows the ability to change the Status of the Order.

Note that changing an Order Status to Canceled does NOT perform a Refund. If a refund is needed, follow the Refund Process.

Once the new Status has been selected, click on "Change Status" to save the change.

Don't forget to click "Save Changes" prior to exiting the screen.