



Order Management: Editing Recurring Orders

v 1.0

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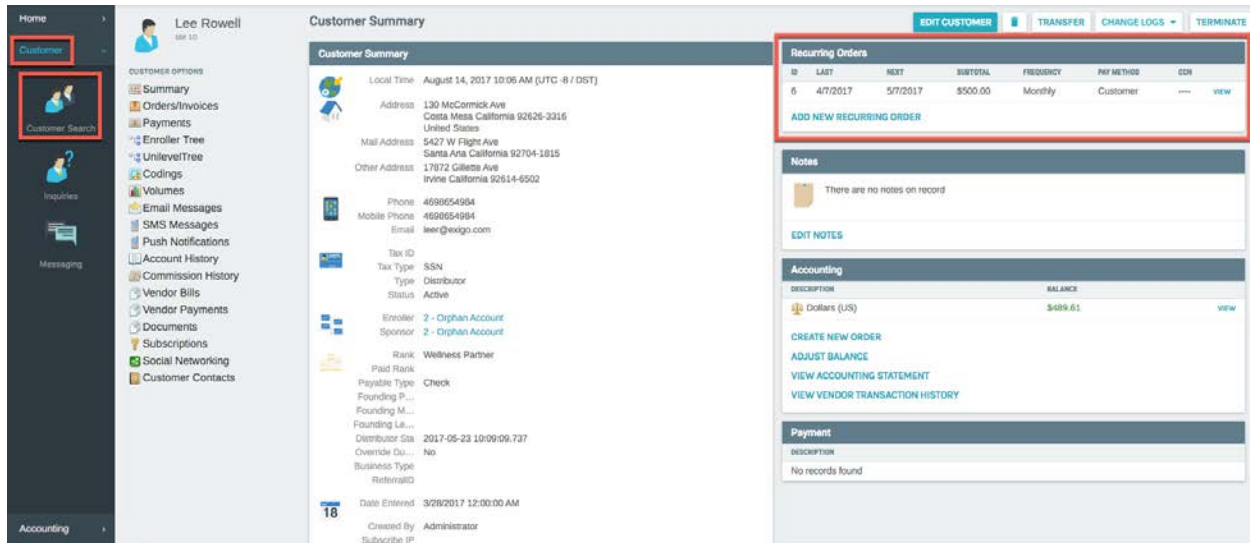
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Editing a Recurring Order

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

Customer > Customer Search > Customer Record

The Recurring Order section is located in the upper right corner of the screen as shown below:



The screenshot displays the 'Customer Summary' page for Lee Rowell. The 'Recurring Orders' section is highlighted with a red box and contains the following table:

ID	LAST	NEXT	SUBTOTAL	FREQUENCY	PAY METHOD	CDR	
6	4/7/2017	5/7/2017	\$500.00	Monthly	Customer	---	VIEW

Below the table, there are links for 'ADD NEW RECURRING ORDER', 'Notes', 'Accounting', and 'Payment'.

To edit a Recurring Order, click on the appropriate Recurring Order. The following window will be displayed:

Recurring Order #575
✖

EDIT RECURRING ORDER
CREATE ORDER
HISTORY
LISTING

Invoice | Details

Recurring Templ...
🖨️
✖
📄

To	Info
Lee Rowell 130 McCormick Ave Costa Mesa, CA 92626-3316 US	575 10 Lee Rowell leer@exigo.com 4698654984 Monthly N/A 8/15/2017 8:01:00 AM

10-P002-01	1	\$188.95Core Wellness Pack	151.00	151.00	\$188.95
					\$188.95
					\$17.74
					\$40.00
					\$246.69

CLOSE

This screen displays the Invoice for the Recurring Order Template.

To continue click on "Edit Recurring Order".

The following screen will be displayed:

Auto Order #575

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

Shipping Address

Verified

Lee Rowell
130 McCormick Ave
Costa Mesa CA 92626-3316

Mailing Address

Lee Rowell
5427 W Flight Ave
Santa Ana CA 92704-1815

Drop Ship Address

Country United States

Company _____

First Name Lee

Last Name Rowell

Address 130 McCormick Ave

City Costa Mesa California 92626-3316

Email leer@exigo.com Auto Email Invoice

Phone 4698654984 Personal Use

SHIP TO TAB

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.

Else, continue to the next tab for additional Edits.

ITEMS TAB

Click on the Items Tab to move forward.

The following window will be displayed:

Auto Order #575 ✖

Ship To
Items
Ship Method
Schedule
Payment

Warehouse **Main NMI**
Currency **Dollars (US)**

ADD ITEM REMOVE ALL ITEMS

QTY	ITEM CODE	DESCRIPTION	PV	CV	PRICE EACH	TOTAL	
1	10-P002-01	Core Wellness Pack	151.00	151.00	\$188.95	\$188.95	EDIT

SubTotal: **\$188.95**

PV: \$151.00

CV: \$151.00

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-P002-01	Core Wellness Pack	\$ 188.95	1	\$ 188.95

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
✖

By overriding the values of this item, you are setting permanent pricing and volumes for this recurring order. Future orders from this recurring order will ALWAYS have this pricing and will not be updated when you have a price change on the item.

Item Code: SEARCH ITEMS

Enter item code or search string

Override Price

ITEM CODE	DESCRIPTION	PRICE EACH	QUANTITY	TOTAL
10-P002-01	Core Wellness Pack	<input type="text" value="188.95"/>	1	\$ 188.95

Item Price Details / Override

Tax On Price:		188.9500
Ship On Price:		188.9500
PV:		151.0000
CV:		151.0000
Retail Commission		0.0000
Each:		
Override PriceTy		0.0000
Each:		

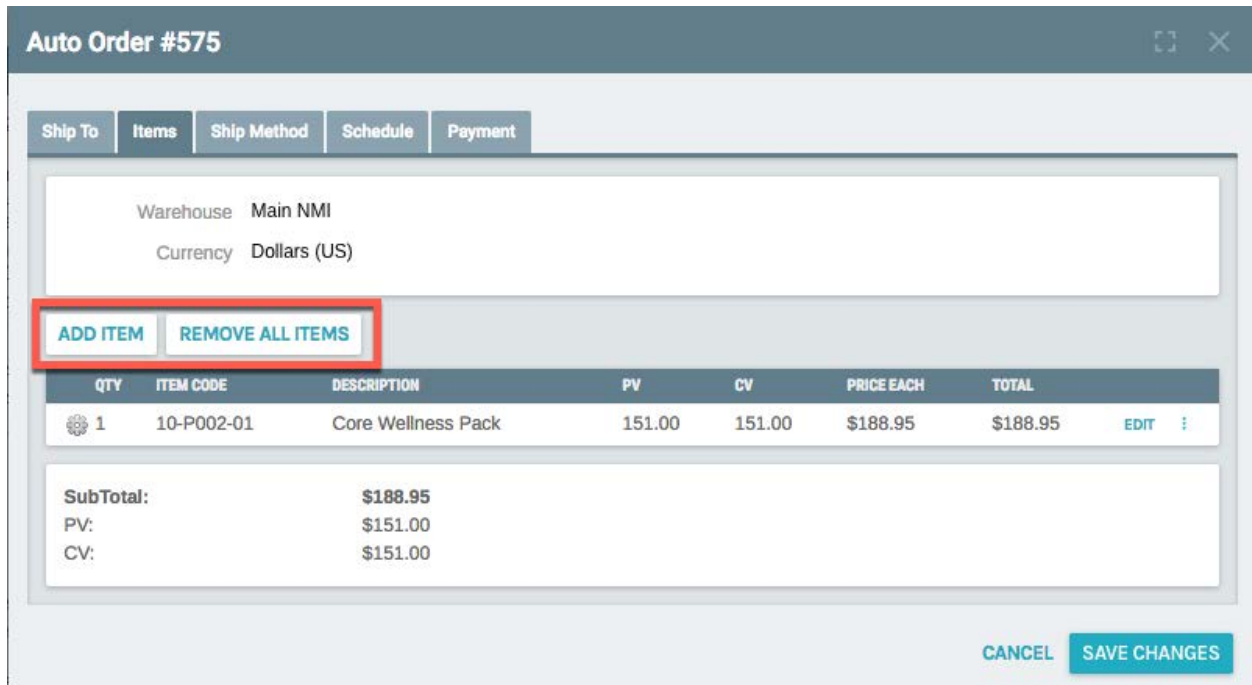
CANCEL
SAVE CHANGES

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

NOTE: This only changes this information on this Recurring 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:



Auto Order #575

Warehouse Main NMI
Currency Dollars (US)

ADD ITEM **REMOVE ALL ITEMS**

QTY	ITEM CODE	DESCRIPTION	PV	CV	PRICE EACH	TOTAL	
1	10-P002-01	Core Wellness Pack	151.00	151.00	\$188.95	\$188.95	EDIT

SubTotal: \$188.95
PV: \$151.00
CV: \$151.00

CANCEL **SAVE CHANGES**

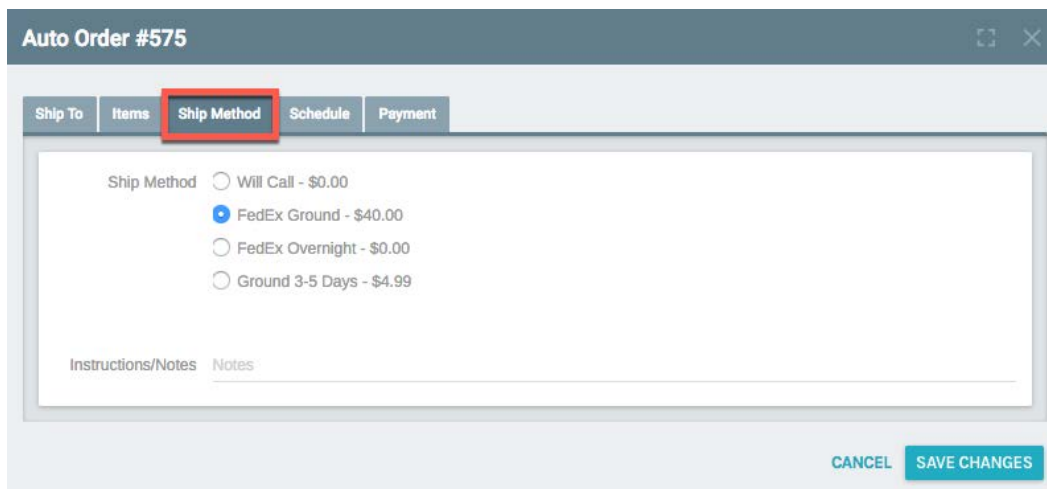
From the Items Tab, you also have the ability to Add a New Item and/or Remove All Items by clicking on the appropriate button. Clicking on Add Item will open the Item Search window.

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:



Auto Order #575

Ship To **Items** **Ship Method** Schedule Payment

Ship Method Will Call - \$0.00
 FedEx Ground - \$40.00
 FedEx Overnight - \$0.00
 Ground 3-5 Days - \$4.99

Instructions/Notes

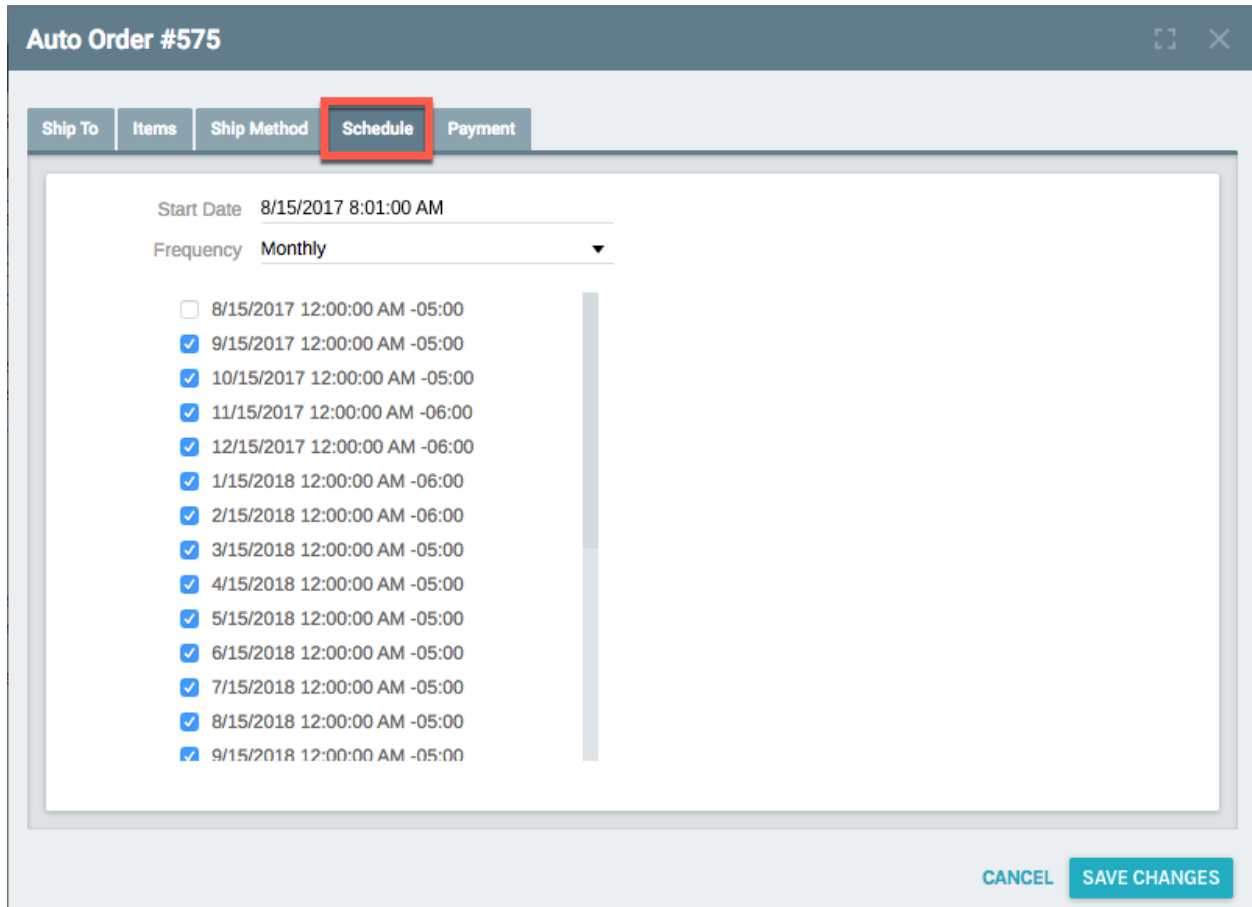
CANCEL **SAVE CHANGES**

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.

SCHEDULE TAB

Clicking on the "Schedule" tab will display the following window:



Auto Order #575

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

Start Date 8/15/2017 8:01:00 AM

Frequency Monthly

- 8/15/2017 12:00:00 AM -05:00
- 9/15/2017 12:00:00 AM -05:00
- 10/15/2017 12:00:00 AM -05:00
- 11/15/2017 12:00:00 AM -06:00
- 12/15/2017 12:00:00 AM -06:00
- 1/15/2018 12:00:00 AM -06:00
- 2/15/2018 12:00:00 AM -06:00
- 3/15/2018 12:00:00 AM -05:00
- 4/15/2018 12:00:00 AM -05:00
- 5/15/2018 12:00:00 AM -05:00
- 6/15/2018 12:00:00 AM -05:00
- 7/15/2018 12:00:00 AM -05:00
- 8/15/2018 12:00:00 AM -05:00
- 9/15/2018 12:00:00 AM -05:00

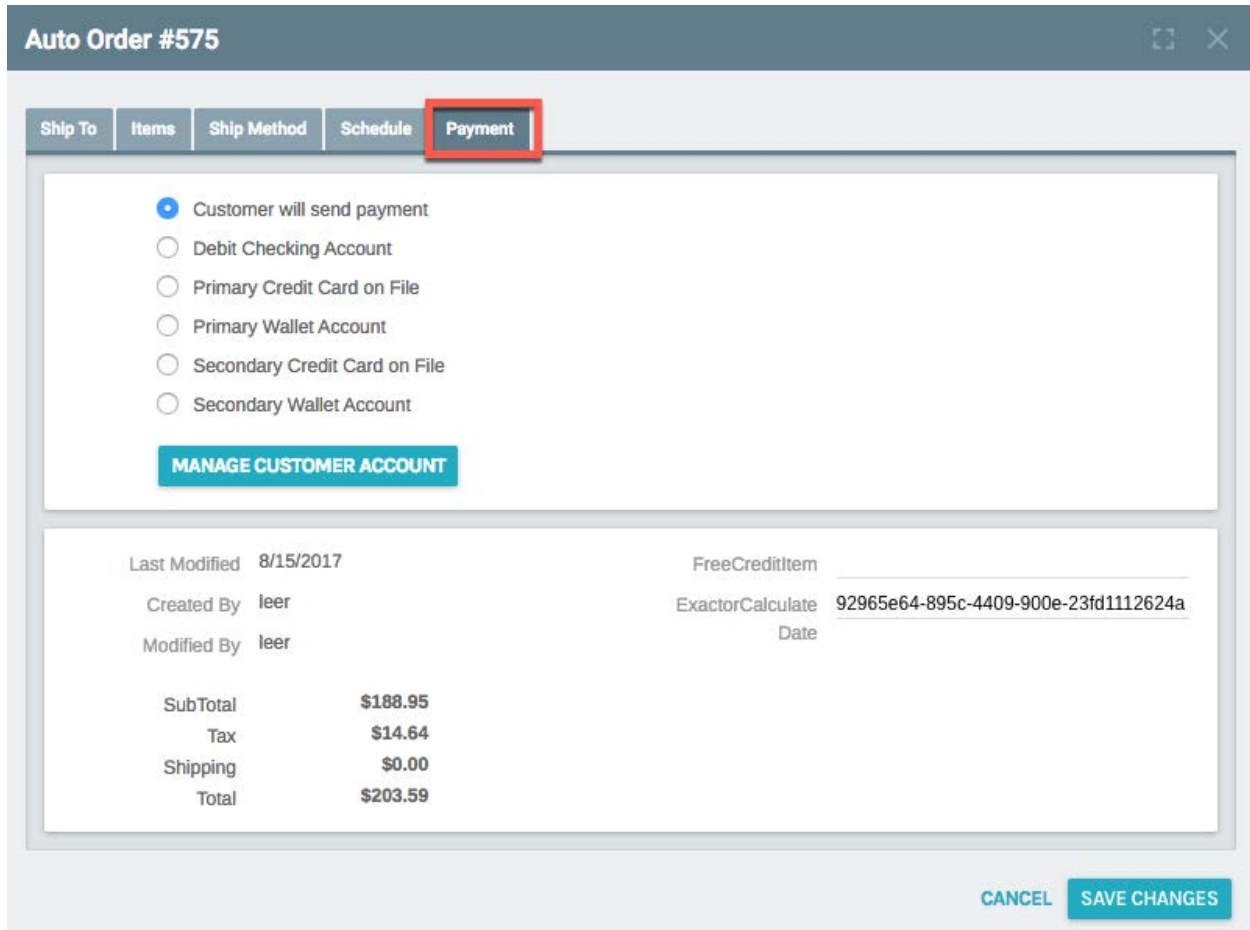
CANCEL SAVE CHANGES

From this screen, the following may be Edited: Start Date, Frequency, and Scheduled Dates. To skip specific months, simply unclick the checkbox next to the Date.

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

PAYMENT TAB

Clicking on the Payment Tab displays the following window:



Auto Order #575

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

- Customer will send payment
- Debit Checking Account
- Primary Credit Card on File
- Primary Wallet Account
- Secondary Credit Card on File
- Secondary Wallet Account

MANAGE CUSTOMER ACCOUNT

Last Modified: 8/15/2017
Created By: leer
Modified By: leer

FreeCreditItem: _____
ExtractorCalculate Date: 92965e64-895c-4409-900e-23fd1112624a

SubTotal	\$188.95
Tax	\$14.64
Shipping	\$0.00
Total	\$203.59

CANCEL **SAVE CHANGES**

This window allows the ability to update the Payment method associated with the Recurring Order.

You may simply click on a new method, or use "Manage Customer Account" to update the Payment Methods on file on the Customer Record.

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