exigo

Order Management:
Editing Standard Orders

v 1.0

Contents

Editing a Standard Order

Exigo allows the ability to Edit Orders. However, use caution when Editing an Order in Accepted, Printed, or Shipped Status.
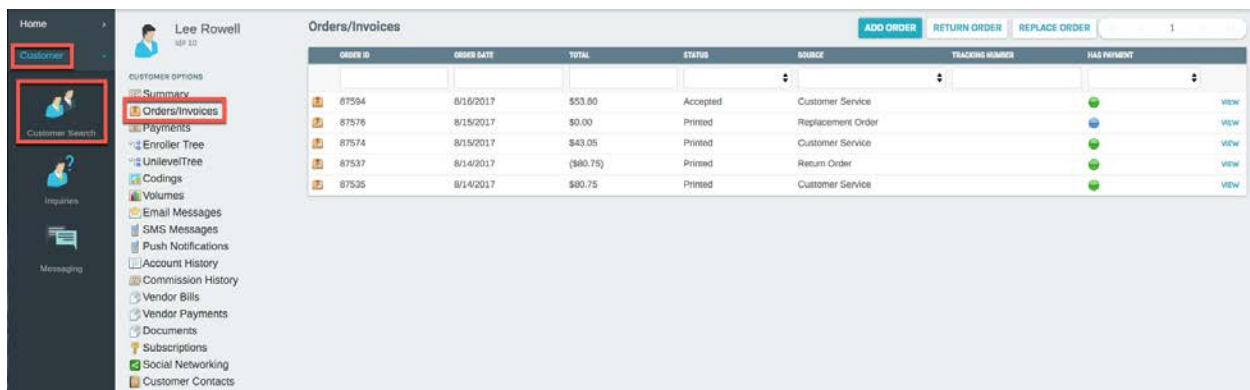
Edits may have unintended effects on other areas of the system.

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:

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

The following window will be displayed:

This screen displays the Invoice for the Order Template.

SHIP TO TAB

To continue click on "Edit Order".

The following screen will be displayed:

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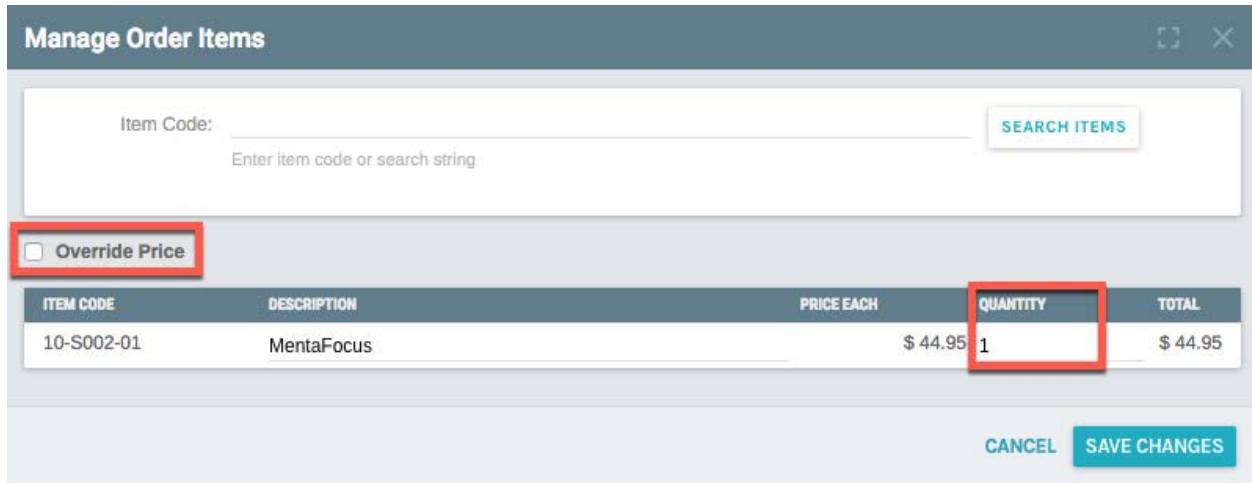
To Edit the Item currently on the Order – including quantity, price, volume, etc., click on Edit.

The following screen will be displayed:

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:

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:

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:

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:

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:
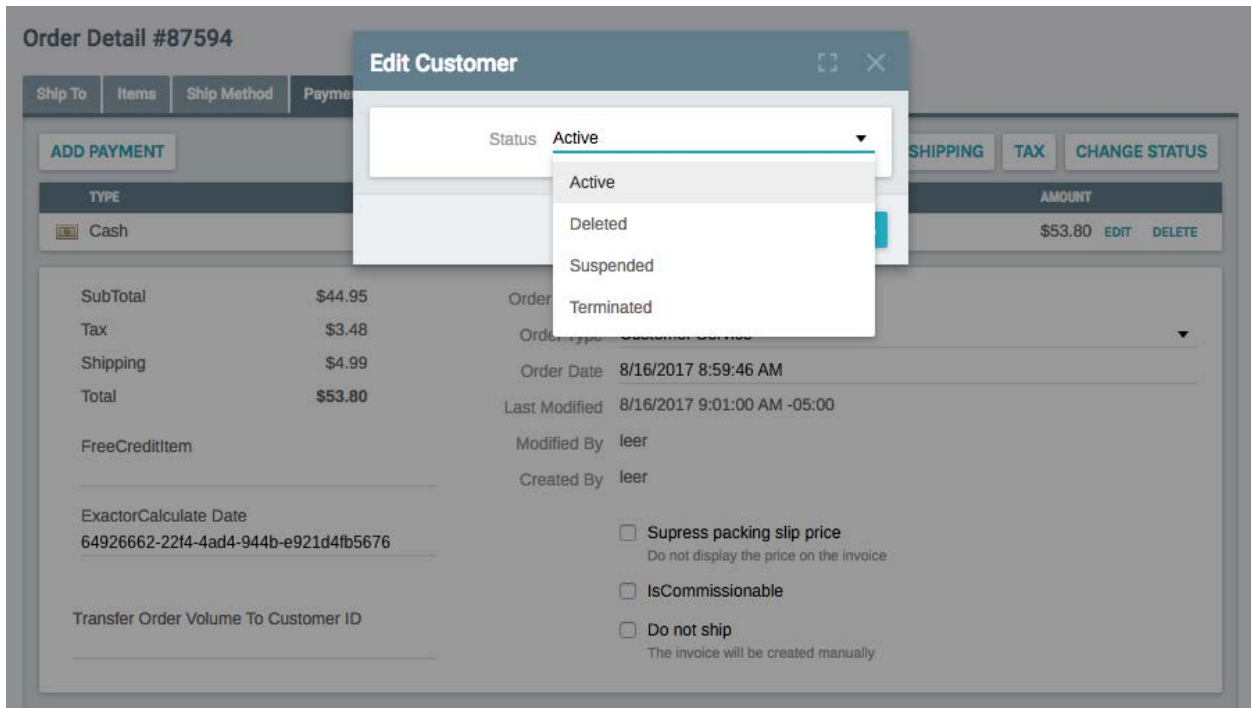
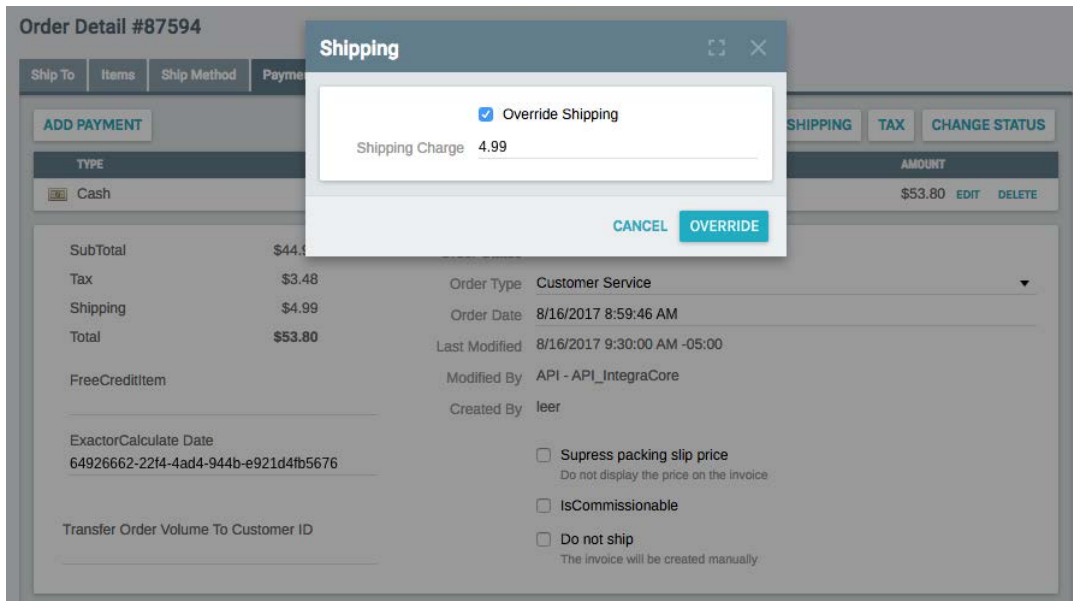This window allows the Customer Status to be changed.

To make a change, click on the new status from the drop down window and click "Save Changes".
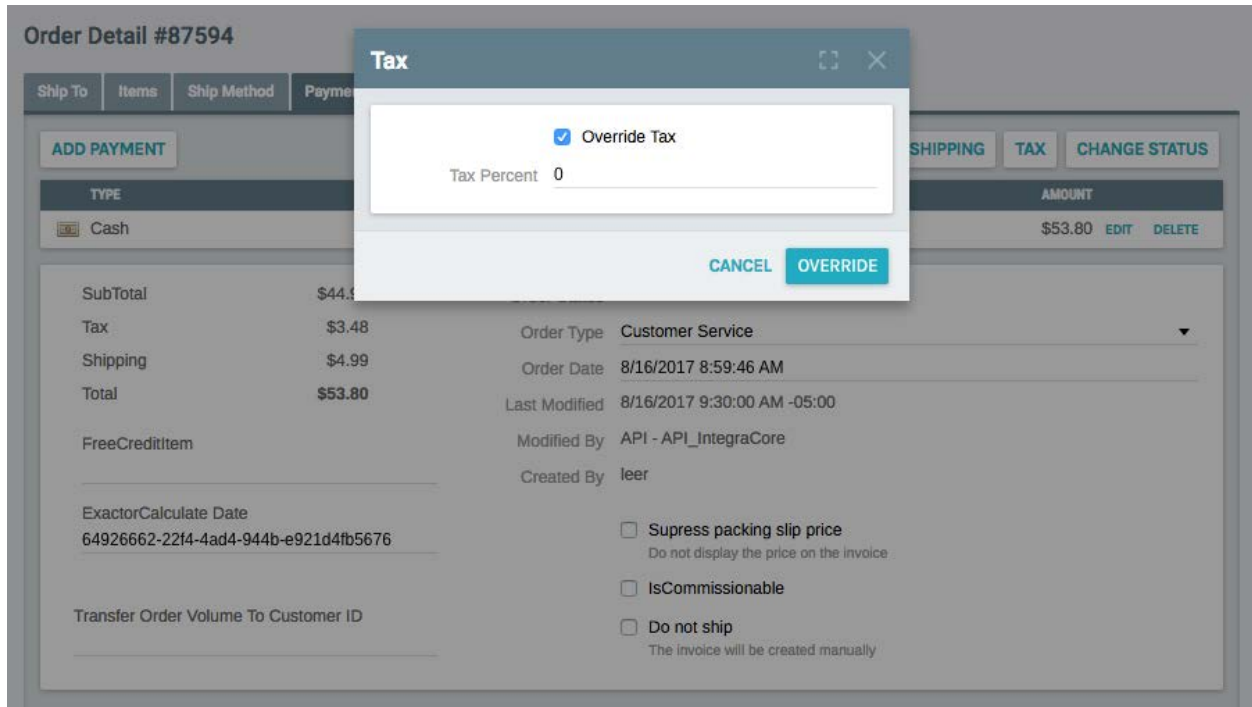
Clicking on the Shipping Tab displays the following window:

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:

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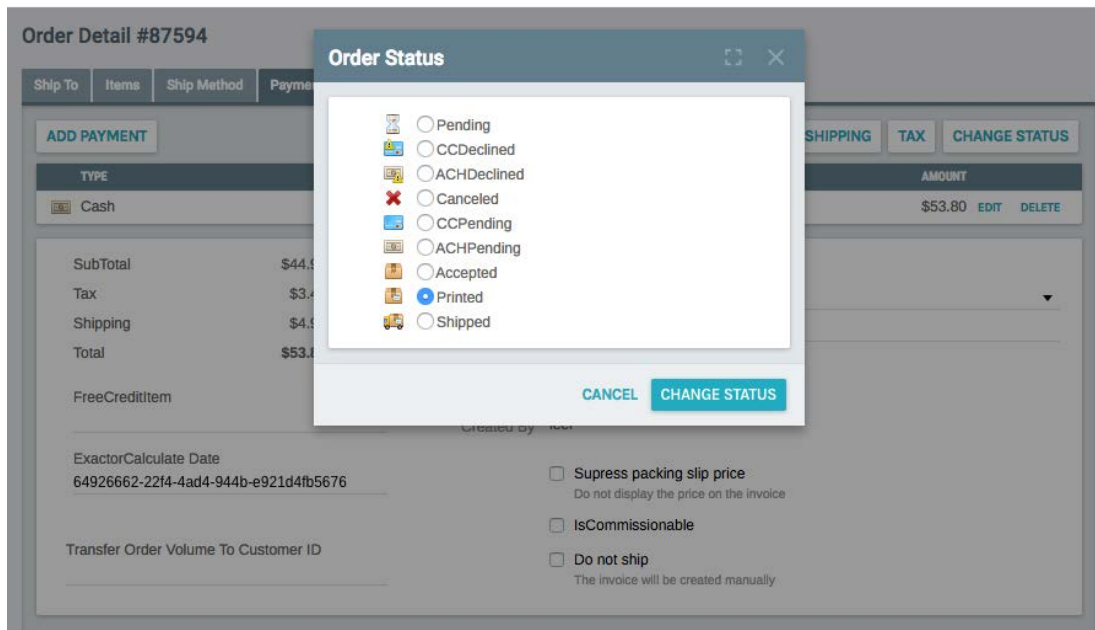
This window allows the ability to change the Status of the Order.

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.