

Editing an Order

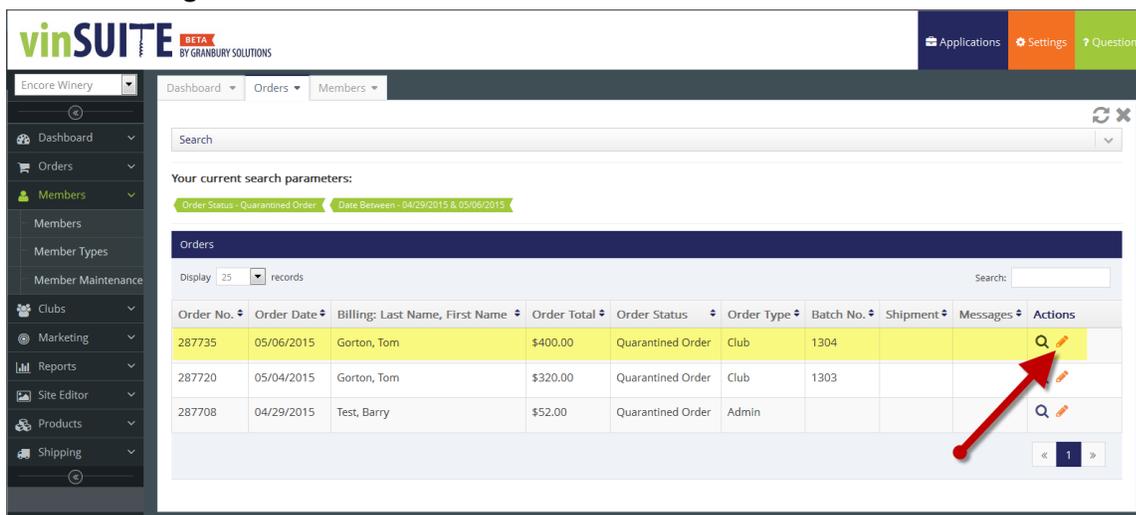
Only orders processed using vinSuite may be editing in vinSuite. Orders from integrated partners (NVPOS, VinoPro, Cellarpass, etc.) cannot be edited in vinSuite. Edits to these orders must be done in the system of origin. Any vinSuite user may edit an order with an open status (Quarantine, Pending, Saved or Accepted). Editing orders is done by selecting the option to edit the order either from the Order Management table or the 'Edit Order' button in the Order Detail screen.

The ability to edit orders in a 'Completed' status is permissions based and is defined by the users Role. User's must be very careful when editing Completed orders as payment has already been accepted on these orders. Certain changes to this order may affect the order total throwing off the reconciliation of the sales record in vinSuite versus the sales record in your payment gateway. Editing an order DOES NOT create a refund or void charges to a credit card, it only changes the information within the order record.

Editing an Order – Open Status

1. In vinSuite, locate the order you wish to edit. Order may be located via Order Management or the 'Order History' tab of the Member Record. In either case, locate the order in the orders list and click the orange pencil icon to edit the order.

In Order Management



The screenshot shows the vinSuite interface for Order Management. The top navigation bar includes 'Applications', 'Settings', and 'Questions'. The left sidebar contains various menu items like 'Dashboard', 'Orders', 'Members', 'Clubs', 'Marketing', 'Reports', 'Site Editor', 'Products', and 'Shipping'. The main content area displays a table of orders with columns for Order No., Order Date, Billing, Order Total, Order Status, Order Type, Batch No., Shipment, Messages, and Actions. A red arrow points to the edit icon (orange pencil) in the Actions column for the first order (Order No. 287735).

Order No.	Order Date	Billing: Last Name, First Name	Order Total	Order Status	Order Type	Batch No.	Shipment	Messages	Actions
287735	05/06/2015	Gorton, Tom	\$400.00	Quarantined Order	Club	1304			
287720	05/04/2015	Gorton, Tom	\$320.00	Quarantined Order	Club	1303			
287708	04/29/2015	Test, Barry	\$52.00	Quarantined Order	Admin				

In Members > Order History

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Applications Settings Questions

Encore Winery Dashboard Orders Members

+ Create Order

Edit Member: Jane Winebox (1068)

Order	Order Type	Date	Name	Total	Status	Actions
2675	Admin	03/05/2014	Winebox, Jane	\$479.04	Accepted Order	Q
287550	Allocation	04/07/2015	Winebox, Jane	\$204.40	Completed Order	Q
287173	Club	03/02/2015	Winebox, Jane	\$155.58	Completed Order	Q
287160	Club	03/02/2015	Winebox, Jane	\$129.60	Completed Order	Q
287159	Club	03/02/2015	Winebox, Jane	\$129.60	Completed Order	Q
287005	Admin	02/23/2015	Winebox, Jane	\$895.36	Completed Order	Q

- The Order Record will open in the OMS (Order Management System). From here users may make any changes to the order that they would like using the editing features provided.

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Applications Settings Questions

Dashboard Orders Members

Save Recall Start Over Accept Process Order

Status: Accepted Order Total: \$560.40

Jane Winebox

Member # 1068
Date Added 01/07/2014
Total Spent
Total #
Average
Largest
Last 365 #
Most Recent

Order History
Purchase History
Preferences
Notes

Club Memberships
Member Types

Billing Information

My Address
Jane Winebox
100 Cabernet Street
Napa, CA 94558
555-555-5555
jane@wineboxesinc.com
01/01/1920

Shipping Information

Office
Jane Winebox
1700 Soscol Ave
Napa, CA 94559
707-253-7400 x1
jane@ewinerysolutions.com
01/01/1920

Add Items

Recent Featured Search Catalog

2008 Encore Cab
12 Encore Cab
2011 Estate Chardonnay
Sacramental Wine

2010 Estate Pinot Noir
2013 Encore Viognier
Lazy Will Call Shipping

12 Items in Order \$480.00

1234589 - 2012 Encore Cabernet Sauvignon - Bottle(s) 12 x \$ 40.00 = \$480.00

Update Order

Address Changes – Can be made by drawing a new address from the Address Book or by keying in new address information.

Billing Information

My Address

Jane Winebox
100 Cabernet Street
Napa, CA 94558
555-555-5555
jane@wineboxesinc.com
01/01/1920

Copy Shipping Add New

Shipping Information

Office

Jane Winebox
1700 Soscol Ave
Napa, CA 94559
707-253-7400 x1
jane@ewinerysolutions.com
01/01/1920

Copy Billing Add New

Product Changes – Add products using the 'Add Items' section on the left of your screen. Edit existing products in the items summary on the right.

Add Items

Recent | Featured | Search | Catalog

- 2008 Encore Cab
- 12 Encore Cab
- 2011 Estate Chardonnay
- Sacramental Wine
- 2010 Estate Pinot Noir
- 2013 Encore Viognier
- Lazy Will Call Shipping

2011 Estate Chardonnay Qty: 6 **+ Add**

998877 - Bottle(s) - 897.257 In stock

12 Items in Order \$480.00

1234589 - 2012 Encore Cabernet Sauvignon - Bottle(s) 12 x \$ 40.00 = \$480.00 **Update Order**

S&H \$38.40

Discounts \$0.00 Tax \$42.00

Payment \$560.40

Wallet: Miles Card 12 Items \$480.00
Shipping \$38.40

Fulfillment Changes – Make changes to how the order will be shipped (or picked up) in the ‘Shipping & Handling’ section.

S&H \$38.40

Order will be shipped? **YES**

Requested Ship Date: 5/6/2015

Wine: 2 Day - TEST (\$38.40) Shipping: \$38.40 Handling: \$0.00

750 ml

Override? **NO**

Save

Discounts – Add or remove discounts using the ‘Discounts’ section.

Discounts \$0.00

Apply

- \$5 Shipping
- 10% off
- 2010 Big Rock Block 30/30
- 50% Off Order
- CabernetGlass
- Club 20%
- Comp Tasting
- Encore Collection
- One Cent Shipping Club
- Take \$10 off

Payments – Add or change payments in the ‘Payments’ section. Here you may choose the tender type for the order and add new credit card information.

Payment **\$560.40** ^

Wallet: Miles Card	12 Items	\$480.00
Master Card	Shipping	\$38.40
1111	Tax	\$42.00
10	Total	\$560.40

2017 CV

Jane Winebox

**Learn more about the editable sections of an order in the OMS.*

3. When all required changes have been made, users may either Complete the order by clicking the 'Process Order' button at the bottom right of the screen. OR save their changes and leave the order in an open status by clicking 'Accept Order' in the bottom right of the screen.

The screenshot shows a payment form titled "Payment" with a total amount of \$560.40. The form includes fields for payment method (Wallet: Miles Card, Master Card), card number (masked with 1111), expiration date (10/2017), CVV (CW), and name (Jane Winebox). A summary table on the right lists 12 Items (\$480.00), Shipping (\$38.40), and Tax (\$42.00), totaling \$560.40. At the bottom right, there are two buttons: "Accept Order" and "Process Order". Red arrows point from the labels "Save Order" and "Complete Order" below to the "Accept Order" and "Process Order" buttons, respectively.

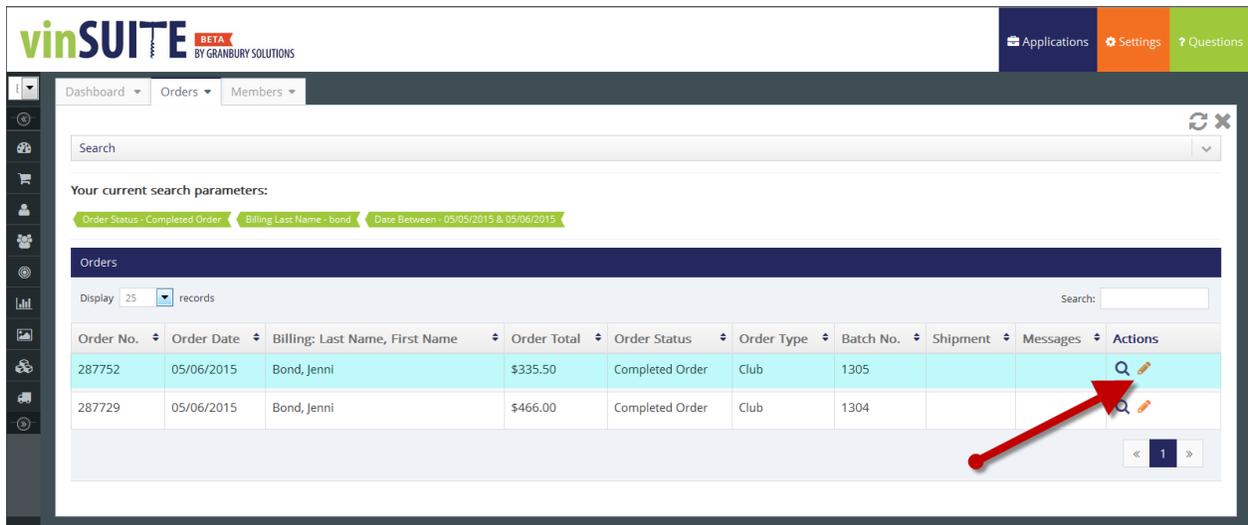
Item	Amount
12 Items	\$480.00
Shipping	\$38.40
Tax	\$42.00
Total	\$560.40

Buttons: **Accept Order** (Save Order), **Process Order** (Complete Order)

Editing an Order – Completed Status

1. In vinSuite, locate the order you wish to edit. Order may be located via Order Management or the 'Order History' tab of the Member Record. In either case, locate the order in the orders list and click the orange pencil icon to edit the order.

In Order Management



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Applications Settings Questions

Dashboard Orders Members

Search

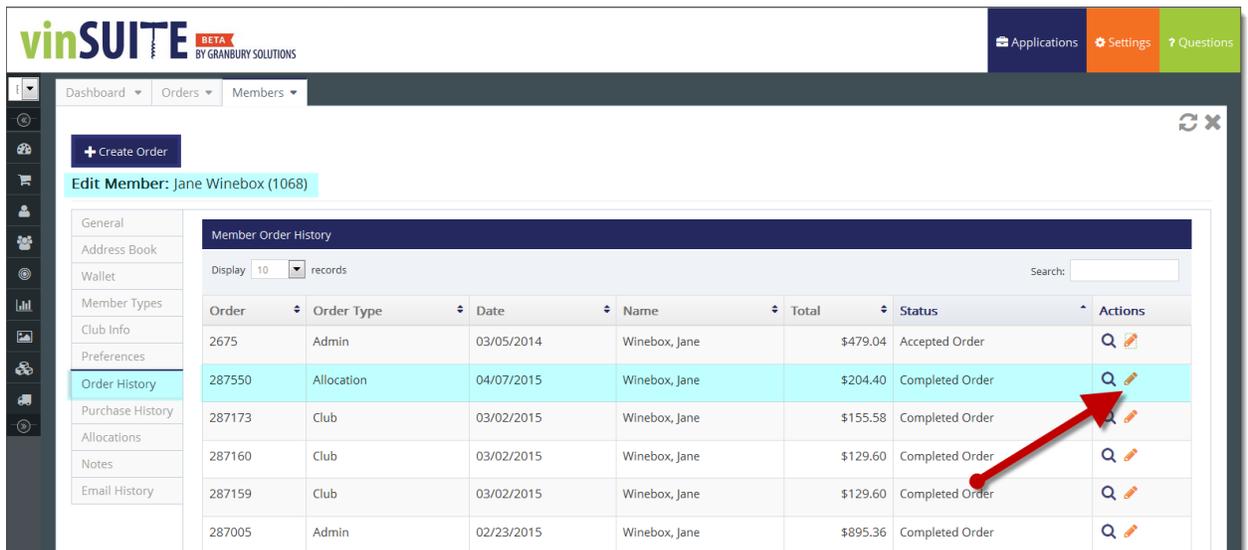
Your current search parameters:
Order Status - Completed Order | Billing Last Name - bond | Date Between - 05/05/2015 & 05/06/2015

Orders

Display 25 records

Order No.	Order Date	Billing: Last Name, First Name	Order Total	Order Status	Order Type	Batch No.	Shipment	Messages	Actions
287752	05/06/2015	Bond, Jenni	\$335.50	Completed Order	Club	1305			 
287729	05/06/2015	Bond, Jenni	\$466.00	Completed Order	Club	1304			 

In Members > Order History



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Applications Settings Questions

Dashboard Orders Members

+ Create Order

Edit Member: Jane Winebox (1068)

General
Address Book
Wallet
Member Types
Club Info
Preferences
Order History
Purchase History
Allocations
Notes
Email History

Member Order History

Display 10 records

Order	Order Type	Date	Name	Total	Status	Actions
2675	Admin	03/05/2014	Winebox, Jane	\$479.04	Accepted Order	 
287550	Allocation	04/07/2015	Winebox, Jane	\$204.40	Completed Order	 
287173	Club	03/02/2015	Winebox, Jane	\$155.58	Completed Order	 
287160	Club	03/02/2015	Winebox, Jane	\$129.60	Completed Order	 
287159	Club	03/02/2015	Winebox, Jane	\$129.60	Completed Order	 
287005	Admin	02/23/2015	Winebox, Jane	\$895.36	Completed Order	 

2. The Order Record will open in the OMS (Order Management System). From here users may make any changes to the order that they would like using the editing features provided.

The screenshot shows the vinSUITE OMS interface. At the top, there's a navigation bar with 'Applications', 'Settings', and 'Questions'. Below that, a 'Dashboard' and 'Members' dropdown menu is visible. The main content area displays a member profile for 'Jane Winebox' with details like Member # 1068, Date Added 01/07/2014, and Total Spent. There are buttons for 'Save', 'Recall', 'Start Over', 'Accept', and 'Process Order'. A red box highlights the 'Status: Completed Order' indicator. To the right, there are sections for 'Billing Information' and 'Shipping Information', both with edit icons. The total amount is \$142.45.

As mentioned above, exercising caution when editing Completed orders is strongly recommended. Changes made here could affect the order total, throwing your reconciliation with the bank off balance. Also, note that changes made here do not create refunds or affect the payment amount collected in any way.

Suggested areas available to be edited are as follows;

- Adjustments to spelling of names and addresses.
- Addition of apartment or suite numbers.
- Change of email address or phone number.

3. Make your required changes, clicking 'Save' where required.

This is a close-up of the 'Billing Information' and 'Shipping Information' forms. The 'Billing Information' form has fields for 'My Address', 'Jane Winebox', 'Company Name', '100 Cabernet Street', 'Apt B', 'Napa CA 94558', '555-555-5555', and 'jane@wineboxesinc.com'. There are dropdown menus for month (Jan), day (1), and year (1920). An 'Update Address Book' section has a 'YES' button. The 'Shipping Information' form has a dropdown for 'Office' and an edit icon. It shows 'Jane Winebox', '1700 Soscol Ave Napa, CA 94559', '707-253-7400 x1', 'jane@winerysolutions.com', and '01/01/1920'. At the bottom, there are 'Cancel' and 'Save' buttons. A red arrow points to the 'Save' button.

- When all changes have been made. Close out of the order screen using the drop down menu in the 'Orders' (or 'Members', depending on how you accessed the order) tab.

