Editing an Order

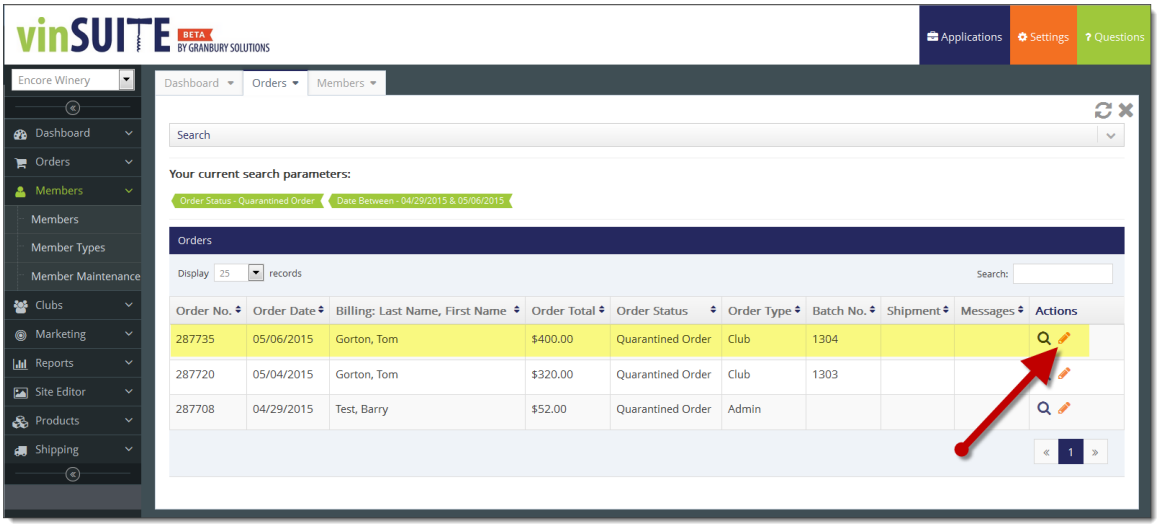
Only orders processed using vinSuite may be editing in vinSuite. Orders from integrated partners (NVPOS, VinoPro, Cellarpass, etc.) cannot be edited in vinSuite. Edits to these orders must be done in the systme of origin. Any vinSuite user may edit an order with an open status (Quarantine, Pending, Saved 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 Oder 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.

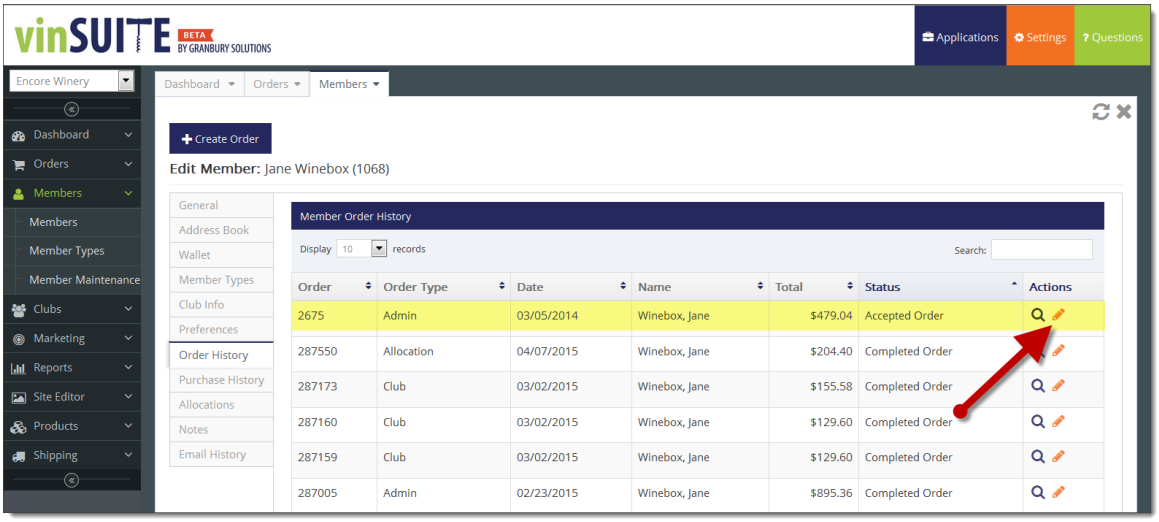
Editing an Order – Open Status

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.

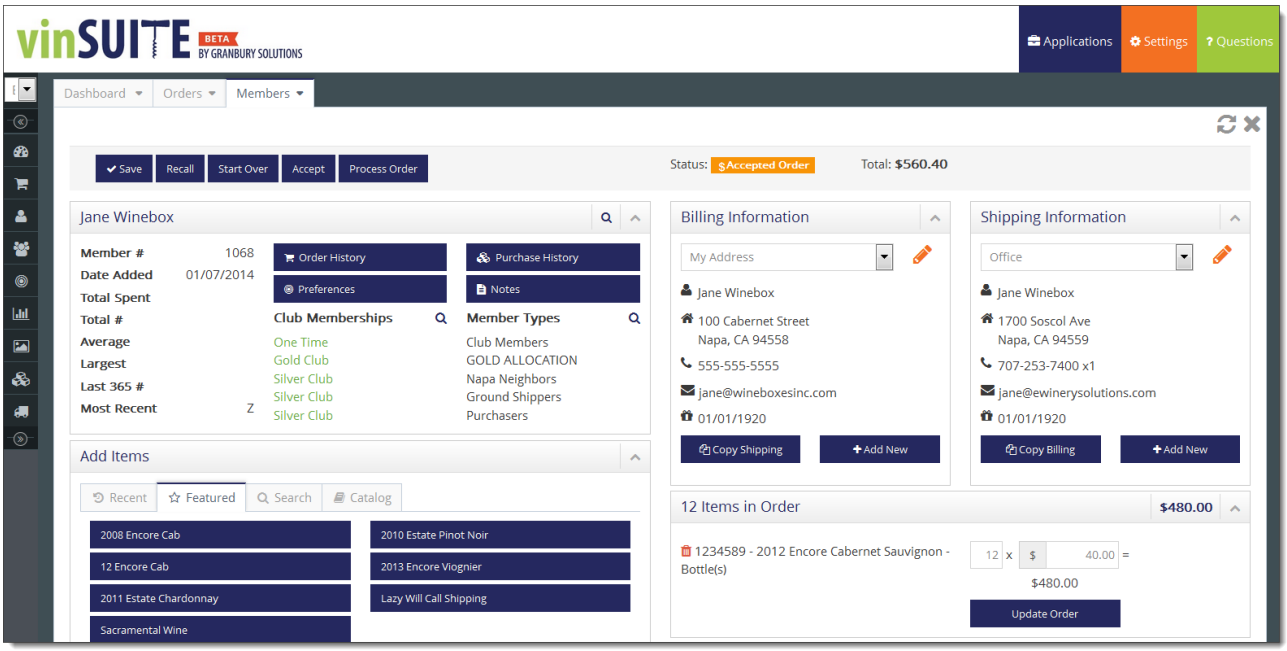
In Order Management



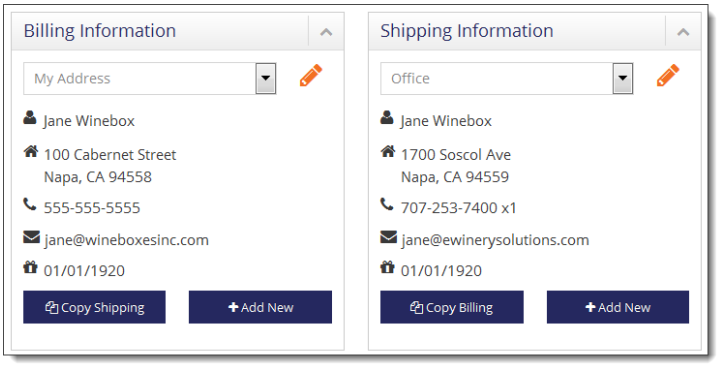
In Members > Order History



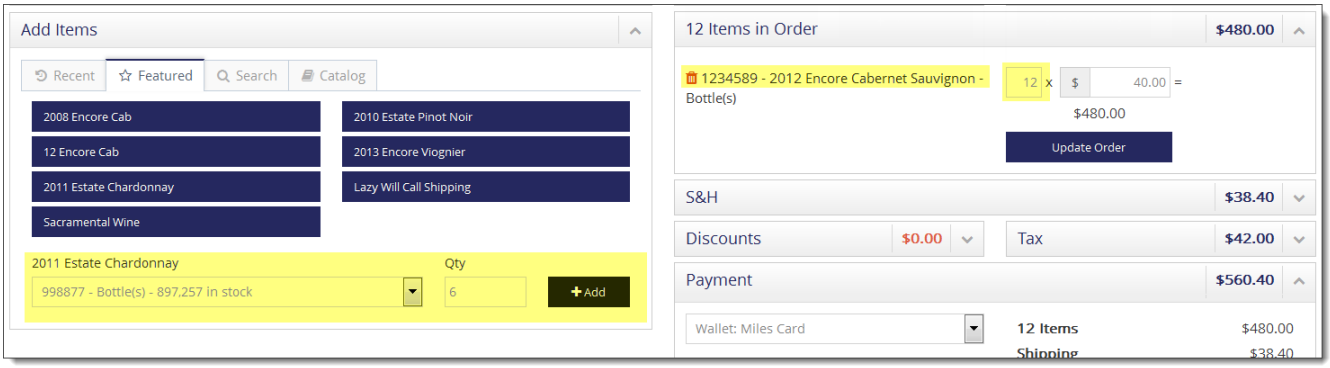
2. The Order Record will open in the OMS (Order Management System). From here users may make any changes to the order that they would like using the editing features provided.



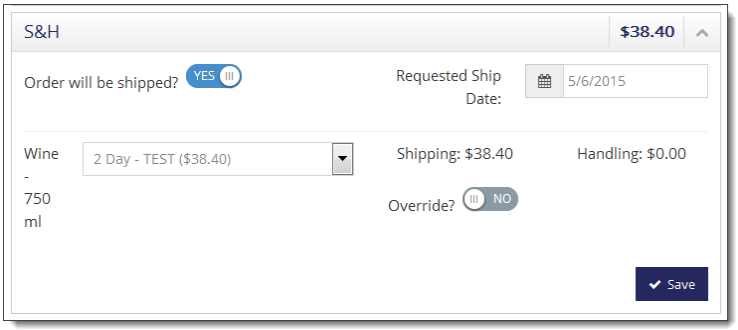
Address Changes – Can be made by drawing a new address from the Address Book or by keying in new address information.



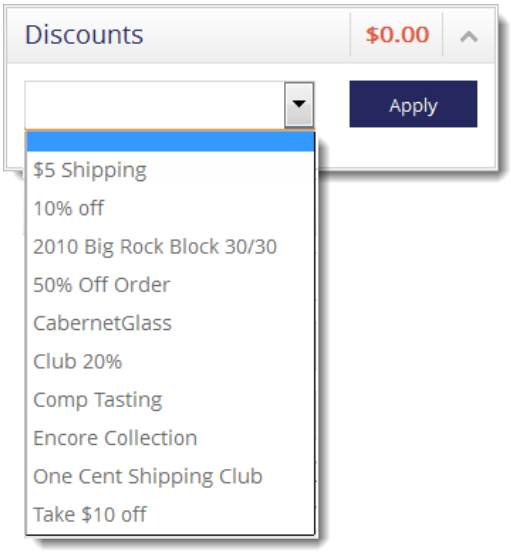
Product Changes – Add products using the 'Add Items' section on the left of your screen. Edit existing products in the items summary on the right.



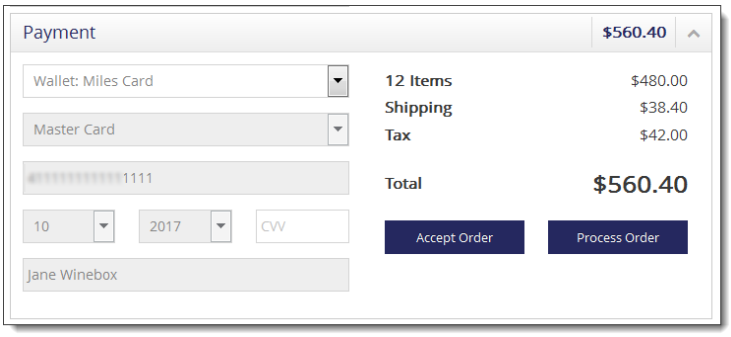
Fulfillment Changes – Make changes to how the order will be shipped (or picked up) in the 'Shipping & Handling' section.



Discounts – Add or remove discounts using the 'Discounts' section.

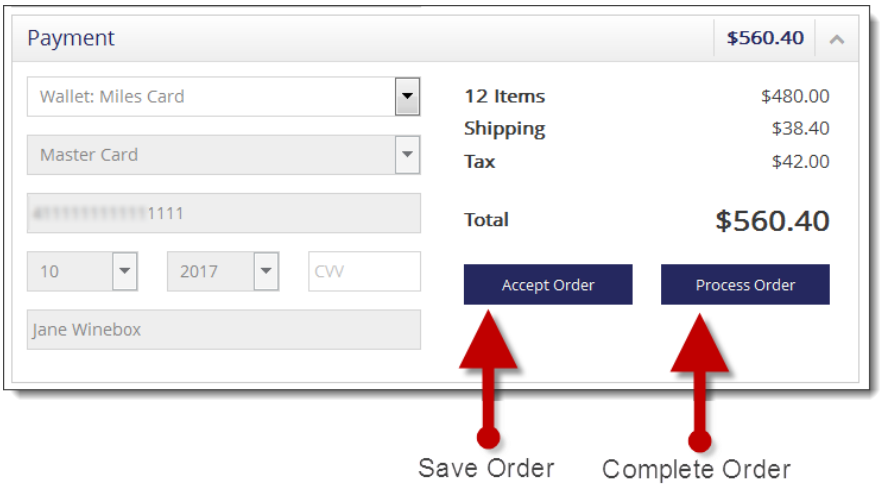


Payments – Add or change payments in the 'Payments' section. Here you may choose the tender type for the order and add new credit card information.



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

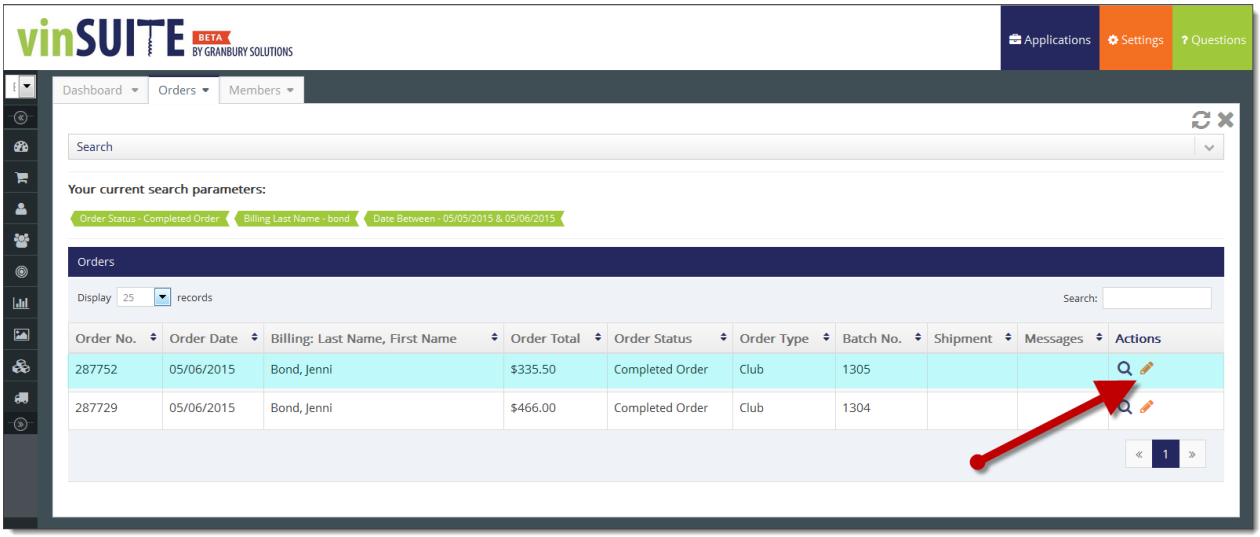
3. When all required changes have been made, users may either Complete the order by clicking the 'Process Order' button at the bottom right of the screen. OR save their changes and leave the order in an open status by clicking 'Accept Order' in the bottom right of the screen.



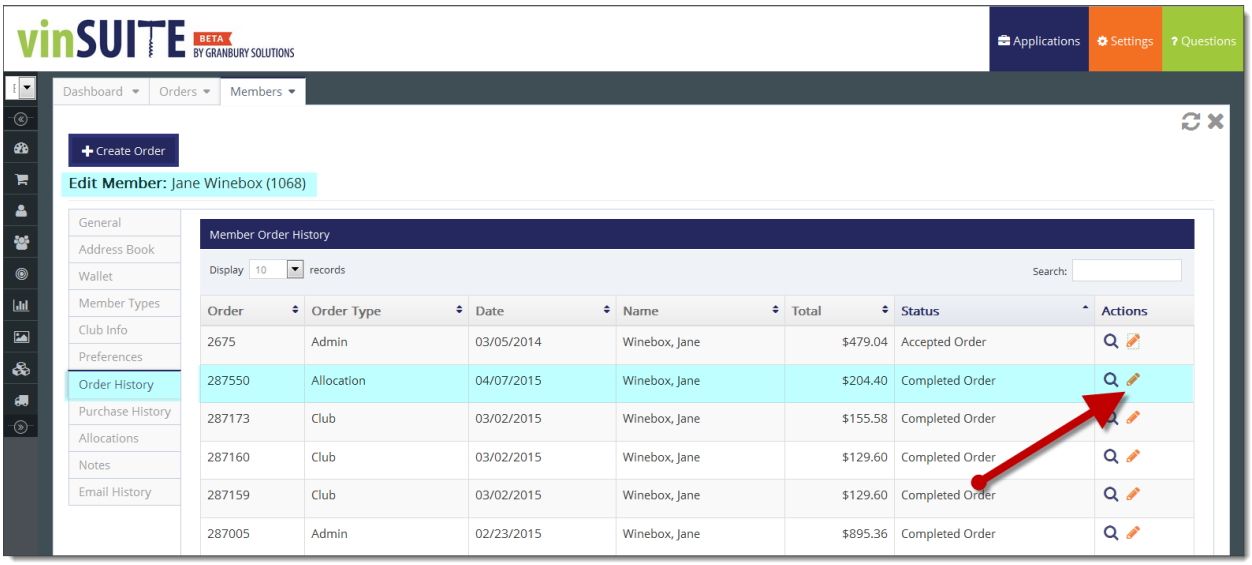
Editing an Order – Completed Status

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.

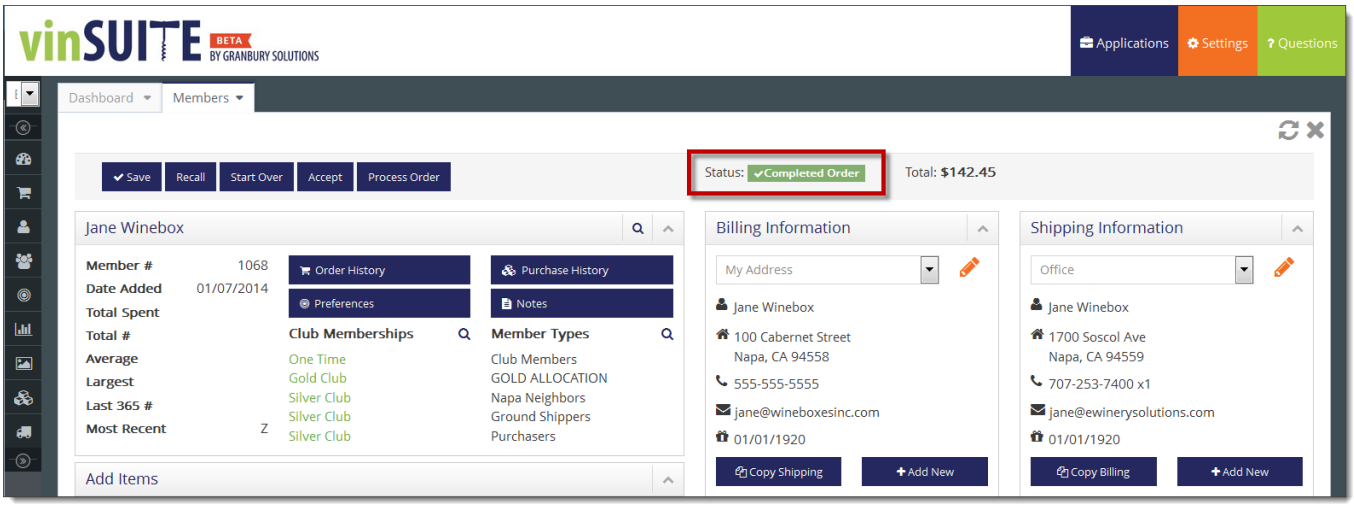
In Order Management



In Members > Order History



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.

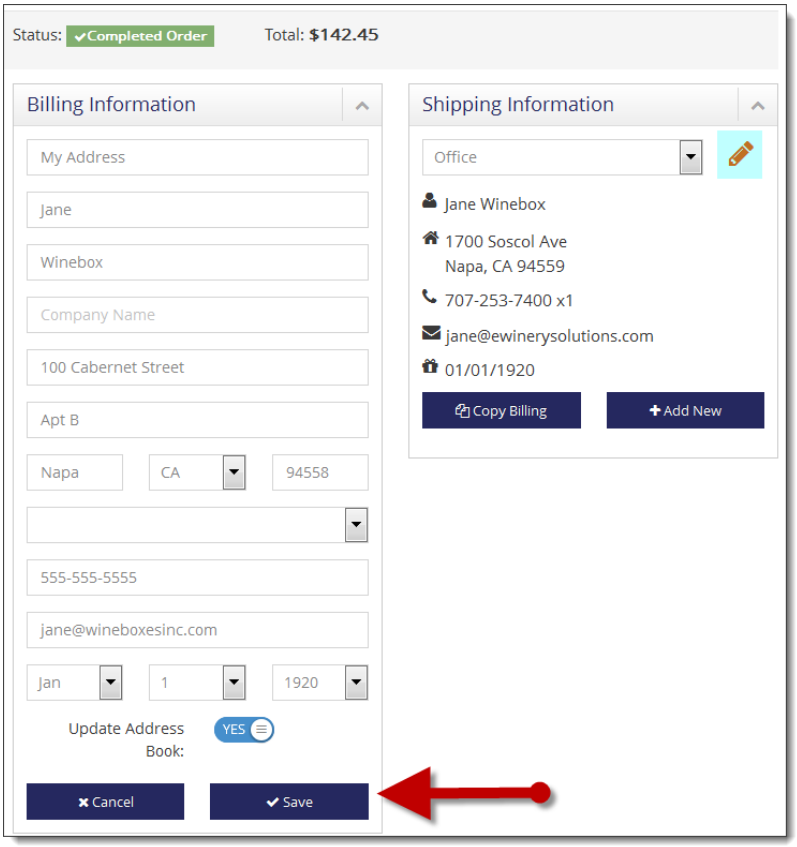
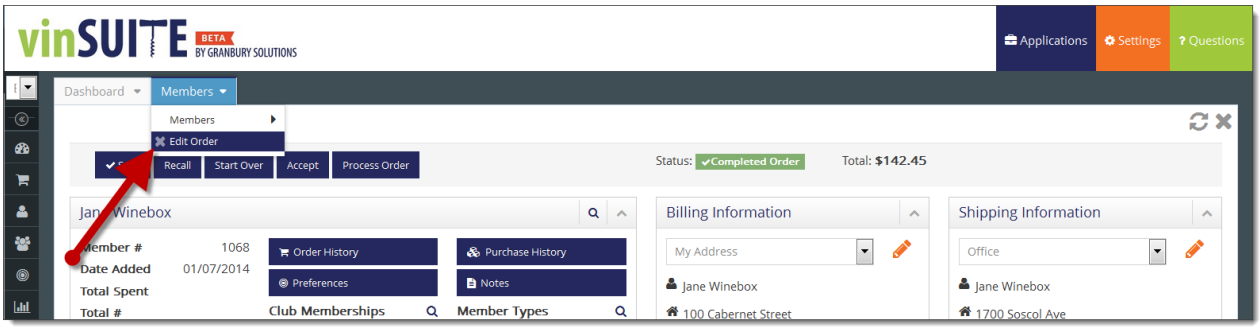


As mentioned above, exercising caution when editing Completed orders is strongly recommended. Changes made here could affect the order total, throwing your reconciliation with the bank off balance. Also, note that changes made here do not create refunds or affect the payment amount collected in any way.

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.



4. 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.