



Chapter 5: Making Changes

Because it will often be necessary for you to edit, modify, and/or add information within the Web Order Entry system, this chapter presents detailed information on how to go about making changes.



You can only make changes to your orders while the party has a status of "Not Submitted" and the orders have a "Pending" Status.

Adding Items to an Order

You may add items to any "Pending" customer order by implementing the following steps:

1. In the Party History section of the Welcome page, select the desired party by clicking on the corresponding party number in the **Ref#** column.

Welcome to Web Order Entry!
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Attention! Web Order Entry is available anytime except between the hours of 4 a.m. and 8 a.m. Eastern time on Sundays.

Welcome back, Chris! Select an existing party from the list below to review or change, or click on "Party Order" to enter a new party. For non-Party orders, click on the "Non-Party Order" button. For fundraiser orders, click on the "Fundraiser Order" button.

Week# 26 Cutoff: Wednesday, July 03rd 2002 at 2:00pm ET

Ref#	Type	Partial Linked	Description	Host	Date	Sales Credit	Sales Total	Status
275690	Party	No	Karen's Birthday Party	Karen Bush	05/29/2002	768.00	768.00	Not Submitted
275597	Party	No	Hannah's Housewarming - Set 1	Hannah Hall	05/19/2002	262.00	262.00	Not Submitted
275571	Party	No	Birthday Party	Sally Fox	05/21/2002	97.00	97.00	Not Submitted
275463	Party	No	Party For Lois	Lois Williams	05/14/2002	430.00	430.00	Not Submitted
275398	Party	No	Hannah's Housewarming-Set 1	Hannah Hall	04/29/2002	724.00	724.00	Not Submitted
274998	Party	No	Michael's Party	Hannah Hall	05/06/2002	629.00	629.00	Not Submitted

[Non-Party Order](#) [Party Order](#) [Fundraiser Order](#)

2. Click on the **Party Orders & Datings** button to view all of the orders associated with the party.

Party Setup		Chris Hughes	
Party Ref#:	275690	Description:	Karen's Birthday Party
Attendance:	15	# Orders:	3
Partial Party		# Datings:	2
		Host Gift Program:	SUMMER 2002
Cash & Carry Pool:		\$0.00	
Except for direct-to customer orders, this party will be shipped to:		<input checked="" type="radio"/> Host	<input type="radio"/> Consultant
Home Address		Ship Address	
First Name:	Karen		
Last Name:	Bush		
Address:	33 Pine Street		
City:	Orlando	State:	FL
Zip+4:	32802		
E-mail:			
Home Phone:	(407)555-1212		
Work Phone:	Ext:		
<input type="checkbox"/> PO Box <input type="checkbox"/> Military <input type="checkbox"/> Outside City		<input type="checkbox"/> PO Box <input type="checkbox"/> Military <input type="checkbox"/> Outside City	
<input type="checkbox"/> Previous <input type="checkbox"/> Party Summary <input checked="" type="checkbox"/> Party Orders & Datings <input type="checkbox"/> Delete Party		<input type="checkbox"/> Next	

3. Click on the desired order number in the **Order #** column.

4. Click the **Next** button once.
5. On the next available item line, choose an item type from the Item Type drop-down list.
6. Click in the first blank **Item #** field and enter the item # of the product you wish to add to the customer's order. Hit the Tab key and enter a quantity in the **Qty** field.

7. Continue entering additional items. When you've finished, click on the **Verify** button to confirm the availability of the item(s).
8. Follow the process for entering the order as outlined in **Chapter 4: Entering Your Party Orders and Payments**.

Deleting Items from an Order

You may delete items from any "Pending" customer order by implementing the following steps:

1. In the Party History section of the Welcome page, select the desired party by clicking on the corresponding party number in the **Party Ref #** column.

2. Click on the **Party Orders & Datings** button to view all of the orders associated with the party.

3. Click on the desired order number in the **Order #** column.
4. Click the **Next** button once.

5. Click the **Del** check box to the left of the item you wish to remove from the order. You can click in multiple check boxes — this allows you to delete multiple items at one time.

6. Click the **Verify** button to verify the deletions and to stay on the Item Entry page. Or, click the **Next** button to delete the items and move on to the Order Summary and Customer Payment page.

Adding Customer Orders

After you've already established a party in the system, you can add additional customer orders as desired as long as the party has a "Not Submitted" status.

1. In the Party History section of the Welcome page, select the desired party by clicking on the corresponding party number in the **Party Ref #** column.

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Welcome back, Chris! Select an existing party from the list below to review or change, or click on "Party Order" to enter a new party. For non-Party orders, click on the "Non-Party Order" button. For fundraiser orders, click on the "Fundraiser Order" button.								
Week 26 Cutoff: Wednesday, July 03rd 2002 at 2:00pm ET								
Party History				Chris Hughes 				
Ref#	Party Type	Partial Linked	Description	Host	Date	Sales Credit	Sales Total	Status
275600	Party	No	Karen's Birthday Party	Karen Bank	05/28/2002	768.00	768.00	Not Submitted
275601	Party	Partial	Hannah's Housewarming - Set 1	Hannah Hall	05/19/2002	262.00	262.00	Not Submitted
275621	Party	No	Birthday Party	Sally Fur	05/21/2002	97.00	97.00	Not Submitted
275643	Party	No	Party For Lois	Lois Williams	05/14/2002	430.00	430.00	Not Submitted
275688	Party	No	Hannah's Housewarming - Set 1	Hannah Hall	04/28/2002	724.00	724.00	Not Submitted
274998	Party	No	Michael's Party	Hannah Hall	05/06/2002	629.00	629.00	Not Submitted

2. Click on the **Party Orders & Datings** button to view all of the orders associated with the party.

Party Setup				Chris Hughes			
Party Ref#	275690	Description:	Karen'S Birthday Party		Party Date: 05/28/2002		
Attendance	15	# Orders	3		# Datings 2		
Partial Party <input type="checkbox"/>		Host Gift Program SUMMER 2002					
Cash & Carry Pool: \$0.00		Pool Amount Applied to this Party \$ <input type="text"/>					
Except for direct-to customer orders, this party will be shipped to: <input checked="" type="radio"/> Host <input type="radio"/> Consultant							
<input checked="" type="checkbox"/> Home Address <input type="button" value="Host Search"/>		<input checked="" type="checkbox"/> Ship Address <input type="checkbox"/> Same as Home Address					
First Name	Karen			First Name	Karen		
Last Name	Bank			Last Name	Bank		
Address	33 Pine Street			Address	33 Pine Street		
Apt/Suite	<input type="text"/>			Apt/Suite	<input type="text"/>		
City	Orlando	State	<input type="text" value="FL"/>	City	Orlando	State	<input type="text" value="FL"/>
Zip+4	32802	-	<input type="text"/>	Zip+4	32802	-	<input type="text"/>
E-mail	<input type="text"/>			Work Phone	<input type="text"/>		
Home Phone	(407)555-1212			Extn.	<input type="text"/>		
Work Phone	<input type="text"/>			Extn.	<input type="text"/>		
<input type="checkbox"/> PO Box <input type="checkbox"/> Military <input type="checkbox"/> Outside City				<input type="checkbox"/> PO Box <input type="checkbox"/> Military <input type="checkbox"/> Outside City			
<input type="button" value="Previous"/>		<input type="button" value="Party Summary"/>		<input type="button" value="Party Orders & Datings"/>		<input type="button" value="Delete Party"/>	
<input type="button" value="Next"/>							

3. Click on the **New Order** button and enter the customer's order as outlined in **Chapter 4: Entering Your Party Orders and Payments**.

Deleting Customer Orders

Follow these steps to delete customer orders you've already established in the system on parties that are not yet submitted:

1. In the Party History section of the Welcome page, select the desired party by clicking on the corresponding party number in the **Party Ref #** column.

Ref#	Party Type	Partial Linked	Description	Host	Date	Sales Credit	Sales Total	Status
275690	Party	No	Karen's Birthday Party	Karen Bank	05/28/2002	768.00	768.00	Not Submitted
275597	Party	Partial	Hannah's Housewarming - Set 1	Hannah Hall	05/19/2002	262.00	262.00	Not Submitted
275571	Party	No	Birthday Party	Sally Farr	05/21/2002	97.00	97.00	Not Submitted
275463	Party	No	Party For Lois	Lois Williams	05/14/2002	450.00	450.00	Not Submitted
275088	Party	No	Hannah's Housewarming Set 1	Hannah Hall	04/28/2002	724.00	724.00	Not Submitted
274928	Party	No	Michael's Party	Hannah Hall	05/06/2002	629.00	629.00	Not Submitted

Non-Party Order Party Order Fundraiser Order

2. Click on the **Party Orders** button to view all of the orders associated with the party.

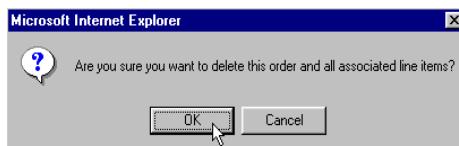
Party Ref#	275690	Description	Karen's Birthday Party	Party Date:	05/28/2002
Attendance	15	# Orders	3	# Datings	2
Partial Party <input checked="" type="checkbox"/>					
Host Gift Program: SUMMER 2002					
Cash & Carry Pool: \$0.00			Pool Amount Applied to this Party: \$ <input type="text"/>		
Except for direct-to customer orders, this party will be shipped to: <input checked="" type="radio"/> Host <input type="radio"/> Consultant					
Home Address <input type="button" value="Host Search"/> First Name: Karen Last Name: Bank Address: 33 Pine Street Apt/Suite: <input type="text"/> City: Orlando State: FL Zip+4: 32802 - <input type="text"/> E-mail: <input type="text"/> Home Phone: (407)555-1212 <input type="text"/> Extn: <input type="text"/> Work Phone: <input type="text"/> Extn: <input type="text"/>			Ship Address <input checked="" type="checkbox"/> Same as Home Address First Name: Karen Last Name: Bank Address: 33 Pine Street Apt/Suite: <input type="text"/> City: Orlando State: FL Zip+4: 32802 - <input type="text"/> Work Phone: <input type="text"/> Extn: <input type="text"/> Ship Instruction: <input type="text"/>		
<input type="checkbox"/> PO Box <input type="checkbox"/> Military <input type="checkbox"/> Outside City			<input type="checkbox"/> PO Box <input type="checkbox"/> Military <input type="checkbox"/> Outside City		
<input type="button" value="Previous"/> <input type="button" value="Party Summary"/> <input type="button" value="Party Orders & Datings"/> <input type="button" value="Delete Party"/>		<input type="button" value="Next"/>			

3. Click on the desired order number in the **Order #** column.

4. Click on the **Delete** button.

Customer Order		Chris Hughes 
Party Ref#	275690	Description: Karen'S Birthday Party
Order Ref#	82835097	Party Date: 05/28/2002
This order is for: <input checked="" type="radio"/> Customer <input type="radio"/> Host <input type="radio"/> Consultant		
This is a direct-ship order: <input type="checkbox"/> Dated a Party: <input type="checkbox"/>		Party Date <input type="text"/>
<input type="button" value="Home Address"/> <input type="button" value="Customer Search"/>		<input type="button" value="Ship Address"/>
First Name	<input type="text" value="Joe"/>	
Last Name	<input type="text" value="Goodman"/>	
Address	<input type="text" value="778 Sixth Avenue"/>	
Apt/Suite	<input type="text"/>	
City	<input type="text" value="Orlando"/>	State <input type="text" value="FL"/>
Zip+4	<input type="text" value="32802"/>	<input type="text"/>
E-mail	<input type="text"/>	
Home Phone	<input type="text" value="(407)888-1212"/>	
Work Phone	<input type="text"/>	Extn. <input type="text"/>
<input type="checkbox"/> PO Box <input type="checkbox"/> Military <input type="checkbox"/> Outside City		<input type="checkbox"/> PO Box <input type="checkbox"/> Military <input type="checkbox"/> Outside City
<input type="button" value="Previous"/>		<input type="button" value="Delete"/> 
<input type="button" value="Order Summary"/>		<input type="button" value="Next"/>

5. Click on the **OK** button when the following dialog appears:



The customer's order, along with all of its associated information, will then be deleted from the party. The system will then return you to the Party Orders page.

Deleting a Party

There may be times when you need to delete a party. Follow these steps after you've deleted all of the "Pending" orders associated with the party.:



Important! You must delete all orders associated with a Party before you can delete the Party.

1. In the Party History section of the Welcome page, select the desired party by clicking on the corresponding party number in the **Party Ref #** column.

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275463	Party	No	Party For Lois	Lois Williams	05/14/2002	450.00	450.00	Not Submitted	
275088	Party	No	Hannah's Housewarming Set 1	Hannah Hall	04/28/2002	724.00	724.00	Not Submitted	
274998	Party	No	Michael's Party	Hannah Hall	05/06/2002	629.00	629.00	Not Submitted	

Non-Party Order Party Order Fundraiser Order

2. Click on the **Delete Party** button.

Party Setup **Chris Hughes**

Party Ref#:	275690	Description:	Karen's Birthday Party	Party Date:	05/28/2002
Attendance:	15	# Orders:	3	# Datings:	2
Partial Party <input type="checkbox"/>			Host Gift Program: SUMMER 2002		
Cash & Carry Pool: \$0.00			Pool Amount Applied to this Party: \$ <input type="text"/>		
Except for direct-to customer orders, this party will be shipped to: <input type="radio"/> Host <input type="radio"/> Consultant					

Home Address **Ship Address** Same as Home Address

First Name:	Karen	
Last Name:	Bank	
Address:	33 Pine Street	
Apt/Suite:		
City:	Orlando	State:
Zip+4:	32802	-
E-mail:		
Home Phone:	(407)555-1212	
Work Phone:		
Extn: <input type="text"/>		
<input type="checkbox"/> PO Box <input type="checkbox"/> Military <input type="checkbox"/> Outside City		
<input type="checkbox"/> PO Box <input type="checkbox"/> Military <input type="checkbox"/> Outside City		

Previous **Party Summary** **Party Orders & Datings** **Delete Party** **Next**

3. Click on the **OK** button when the following dialog appears:



The party will then be deleted from the system.



Remember, all parties with a "Not Shipped" status will automatically be deleted by the system after 14 days.