



Modifying Orders - Daycare packages, daycare products, sign-in/sign-out times.

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There are several different scenarios where you may want to modify an existing order in PetExec. It is important to know that changes made to orders happen in real time. Any changes made on modify order screen are in effect immediately.

In this document we will address some daycare scenarios. For the first example, we will:

- modify the order to add a daycare package to the order.
- use the package for the day of daycare.
- charge the customer for the package, rather than the day of daycare.

1. First step is to find the order that you need to modify. Begin in the PetExec menu under Order Processing-->Modify Order. Search for the order by Owner first name, last name, email address or order ID. Click on the order id you wish to modify. You can also access orders from the owner menu under "purchase history". Either way will take you the modify order screen.

## Modify Order i

**Search**

 Search

**Search Results**

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Order Id	Owner Name	Transaction Date	Charge	Tax	Discount	Amount Applied	Receipt	Delete
10805147	Jones, Susie	06/16/2016 07:50 AM	25.00	0.00	0.00	25.00	Receipt PDF Email	Delete
10805142	Jones, Susie	06/16/2016 07:49 AM	210.00	0.00	0.00	210.00	Receipt PDF Email	Delete
10729418	Jones, Susie	06/09/2016 03:48 PM	0.00	0.00	0.00	130.00	Receipt PDF Email	Delete
10472649	Jones, Susie	05/18/2016 09:38 PM	130.00	0.00	0.00	0.00	Receipt PDF Email	Delete

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2. This is the current order, id 10805147. You can see that owner Susie Jones paid \$25 for a full day of daycare.

Billing Information for Order Id: 10805147 [i](#)

Order Date  
06/16/2016 07:50 AM

Permanently Delete This Order

Receipt

Email Receipt

Purchase History

Modify Owner

Apply Refund

Click to Toggle Owner Information for Susie Jones

**Transaction Detail**

Product/Service	Price	Quantity	Subtotal	Delete
Full Day Daycare <small>06/16/2016 07:50 AM - 06/16/2016 07:50 AM</small> Roxy	25.00	1	\$25.00	Delete
Tip / Gratuity	0.00	1	\$ 0.00	Delete

**Discount**

Total Discount to Date : 0.00

Subtotal \$25.00

Tax \$ 0.00

**Total** **\$25.00**

[Add a Product](#)

**Account Balance**

As of 06/16/2016 07:52:37 AM, this account is in balance

**Payment Information**

Select a Payment Type \*

Select a Payment Type

Additional Notes

Skip Receipt  
 Email Receipt

Amount Applied

Amount Applied

[Process Order](#)

**Payment History**

Change the dates, additional info or amount applied as needed and press the "Update History" button to change the record. Selecting the "delete" checkbox will delete the record from the system and recalculate the totals.

Note: Once deleted, the record can not be recovered. You can always add a new history record above to fix it. Dates need to be in a readable format like mm/dd/yyyy hh:mm AM.

There has to be at least ONE history record. If there are none, they were all deleted. Please select at least a "No Payment" with a charge of \$0.00.

Changing the type to "Credit" DOES NOT charge external processors like First Data!

Order Date	Employee	Additional Info	Type	Amount Applied	Delete
06/16/2016 07:50 AM	PetExec Administration - Dori	Initial Transaction	Cash	25.00	Delete

[Update History](#)

[Return to Daily Stats](#)

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3. In this example, we will modify this order to purchase a daycare package and then use that daycare package for the day of daycare.
  1. First, from the order screen pictured earlier click on the "Add a Product" button;
  2. "select" the daycare package you wish to purchase,
  3. click purchase and return to modify orders:

<b>Discount</b>	<input type="text"/>
Total Discount to Date : 0.00	
Subtotal	\$100.00
Tax	\$ 0.00
Total	\$100.00

Add a Product 1

## Add a Product / Service (i)

### Available Products / Services

Return to Modify Order Page

Filter:  Filter

Product Name	SKU	Product Type	On-Hand	Qty	Price	Add
Boarding Package - 10 days Cat		Boarding Package		<input style="width: 50px;" type="text" value="1"/>	300.00	<span style="border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; background-color: #e0e0e0;">select</span>
Daycare Package - 10 Visits		Daycare Packages		<input style="width: 50px;" type="text" value="1"/>	200.00	<span style="border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; background-color: #e0e0e0;">select</span>
Daycare Package - 5 days		Daycare Packages		<input style="width: 50px;" type="text" value="1"/>	100.00	<span style="border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; background-color: #ffff00;">selected</span> <span style="font-size: 24px; font-weight: bold; border: 1px solid black; border-radius: 50%; padding: 2px 5px; margin-left: 5px;">2</span>

### Items for Purchase

Service Name	Price	Quantity	Delete
Daycare Package - 5 days	\$100.00	1	<span style="border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; background-color: #e0e0e0;">Delete</span>
<b>Subtotal (Pre-Tax):</b>	<b>\$100.00</b>		

Purchase and Return to Modify Orders 3

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4. When you return to the Modify Order screen you can do the following to complete the order modification:
  1. Click on the Daycare Package drop down list and select to use the daycare package, the full day daycare charge is changed to \$0. The daycare package selected will deduct a daycare day.
  2. The daycare package is added to the order, so you are now charging the customer for the package.
  3. The account now has a debit for \$75 resulting from the \$25 daycare they had paid for in the original order PLUS the cost of the \$100 package, resulting in a \$75 balance due.
  4. Select the payment type, enter amount applied and click "Process Order". If you are using integrated credit card processing, entering "credit card" as the payment type will process that credit card transaction.

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Billing Information for Order Id: 10805147 ?

Order Date

06/16/2016 07:50 AM

Permanently Delete This Order

Email Receipt

Modify Owner

Receipt

Purchase History

Apply Refund

Click to Toggle Owner Information for Susie Jones

Transaction Detail

Product/Service	Price	Quantity	Subtotal	Delete
Full Day Daycare	0.00	1	\$ 0.00	<input type="button" value="Delete"/>
06/16/2016 07:50 AM - 06/16/2016 07:50 AM Roxy				
Daycare Package - 5 days (4 left)				

Product/Service	Price	Quantity	Subtotal	Delete
Tip / Gratuity	0.00	1	\$ 0.00	<input type="button" value="Delete"/>

Product/Service	Price	Quantity	Subtotal	Delete
Daycare Package - 5 days	100.00	1	\$100.00	<input type="button" value="Delete"/>

Discount		
Discount (Discounts Against Entire Order)	0.00	
Subtotal		\$100.00
Tax		\$ 0.00
Total		\$100.00

Add a Product

Account Balance

This account has a DEBIT of (\$75.00).

Payment Information

Select a Payment Type \*

Cash

Fill out the amount applied below and optionally select an "Order Type". Press the "Process Order" button to record the transaction.

Additional Notes

Skip Receipt  
 Email Receipt

Amount Applied

75.00

Process Order

Payment History

Change the dates, additional info or amount applied as needed and press the "Update History" button to change the record. Selecting the "delete" checkbox will delete the record from the system and recalculate the totals.

Note: Once deleted, the record can not be recovered. You can always add a new history record above to fix it. Dates need to be in a readable format like mm/dd/yyyy hh:mm AM.

There has to be at least ONE history record. If there are none, they were all deleted. Please select at least a "No Payment" with a charge of \$0.00.  
Changing the type to "Credit" DOES NOT charge external processors like First Data!

Order Date	Employee	Additional Info	Type	Amount Applied	Delete
06/16/2016 07:50 AM	PetExec Administration - Dori	Initial Transaction	Cash	25.00	<input type="checkbox"/>

Update History

Order History

(Last 10 Changes Shown, Most Recent On Top)

Date: 06/16/2016 07:54:01 AM, added by PetExec Administration - Dori  
Added Daycare Package - 5 days for 100.00 to Order ID 10805147

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- When you have processed the order the payment history will be updated to reflect the additional payment for the package, and order history is updated to reflect the changes.

### Payment History

Change the dates, additional Info or amount applied as needed and press the "Update History" button to change the record. Selecting the "delete" checkbox will delete the record from the system and recalculate the totals.

Note: Once deleted, the record can not be recovered. You can always add a new history record above to fix it. Dates need to be in a readable format like mm/dd/yyyy hh:mm AM .

There has to be at least ONE history record. If there are none, they were all deleted. Please select at least a "No Payment" with a charge of \$0.00.  
Changing the type to "Credit" DOES NOT charge external processors like First Data!

Order Date	Employee	Additional Info	Type	Amount Applied	Delete
06/16/2016 07:55 AM	PetExec Administration - Dori		Cash	75.00	<input type="checkbox"/>
06/16/2016 07:50 AM	PetExec Administration - Dori	Initial Transaction	Cash	25.00	<input type="checkbox"/>

[Update History](#)

### Order History

(Last 10 Changes Shown, Most Recent On Top)

Date: 06/16/2016 07:54:09 AM, changed by PetExec Administration - Dori  
Changed Daycare Package status for Full Day Daycare via Modify Orders.

Date: 06/16/2016 07:54:01 AM, added by PetExec Administration - Dori  
Added Daycare Package - 5 days for 100.00 to Order ID 10805147

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You can also use this same method to modify the order if an owner used a package, but they change their mind and decide they would rather pay for the day of daycare (i.e. picked up early, and so only charged for 1/2 day of daycare, wants to save full day daycare package visit).

- Simply open the order you wish to modify, change from package to no package.
- The daycare charge will then appear, and the account will show the amount owed.
- You can then simply process the payment for the amount owed and complete the transaction. Again, if you are using integrated credit card processing, entering "credit card" as the payment type will process that credit card transaction.

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# Billing Information for Order Id: 10961764 i

Order Date

06/29/2016 10:37 AM

Permanently Delete This Order

Email Receipt

Modify Owner

Receipt

Purchase History

Apply Refund

Click to Toggle Owner Information for Susie Jones

## Transaction Detail

Product/Service	Price	Quantity	Subtotal	Delete
1/2 Day Daycare	10.00	1	\$10.00	Delete
06/29/2016 10:37 AM - 06/29/2016 10:37 AM				
No Package	Roxy			

Product/Service	Price	Quantity	Subtotal	Delete
Tip / Gratuity	0.00	1	\$ 0.00	Delete

Discount	
Discount (Discounts Against Entire Order)	0.00
Subtotal	\$10.00
Tax	\$ 0.00
Total	\$10.00

Add a Product

## Account Balance

This account has a DEBIT of (\$10.00).

## Payment Information

Select a Payment Type \*

Cash

Fill out the amount applied below and optionally select an "Order Type". Press the "Process Order" button to record the transaction.

Additional Notes

Skip Receipt

Email Receipt

Amount Applied

10.00

Process Order

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You can also change the daycare product from the modify order screen. If that creates a debit or a credit on the account you can then balance the account by either processing a payment or issuing a refund. Click here for more information on [refunding an order](#).

And finally, you can change the daycare sign in and sign out times from the order screen as well. From the modify order screen, click on the sign in or sign out button. Update the time and click "OK".

## Billing Information for Order Id: 10805147 ⓘ

Order Date: 06/16/2016 07:50 AM

Click to Toggle Owner Information for Susie Jones

Buttons: Permanently Delete This Order, Email Receipt, Modify Owner, Receipt, Purchase History, Apply Refund

### Transaction Detail

Product/Service	Price	Quantity	Subtotal	Delete
Full Day Daycare	0.00	1	\$ 0.00	<input type="button" value="Delete"/>
06/18/2016 07:50 AM - 06/18/2016 07:50 AM				
Roxy				
Daycare Package - 5 days (4 left)				

Enter the new end date/time

06/16/2016 04:00 PM

Buttons: Cancel, OK

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These times will appear on the customer receipt, so it may be important to the customer that they reflect the accurate time of drop off and pick up.

**PetExec Training - Order Receipt: 10805147**

Order Date/Time 06/16/2016 07:50 AM  
Name Susie Jones  
Address 555 South Drive  
City City  
State VA  
Zip Code 99999  
Email dori@petexec.net  
Work Phone

Signature \_\_\_\_\_

**Transaction Detail**

Transaction Type	Price	Qty	Subtotal
Full Day Daycare	\$ 0.00	1	\$ 0.00
Roxy			
06/16/2016 07:50 AM - 06/16/2016 04:00 PM (Original Unit Price: \$25.00)			
Daycare Package - 5 days	\$100.00	1	\$100.00
Discount	\$ 0.00		
Subtotal			\$100.00
Tax			\$ 0.00
Total			\$100.00