



Update Orders

Update an open sales order on the Wineshipping portal by selecting the dropdown arrow next to the order number. An Update option will display on all eligible orders.

Customer Order No	Customer	PO No./BOL	Ship to Contact	Ship to Company	State/Province	Order Date	Requested Ship Date	Ship Date	Warehouse	Status	Hold Reason	Order Type	Package Type	Carrier	Service	Service	Tracking No	Ice Pack	Ship To Phone
▼ Test MST1			Clay Leslie		CA	4/13/2020	4/29/2020	4/17/2020	Napa, CA	Released		Direct to Consumer	PULP	FedEx	Ground	Ground	No	No	707-968-3362
			Chris Hussey		CA	4/13/2020	4/24/2020	4/24/2020	Napa, CA	Released		Direct to Consumer	PULP	FedEx	Ground	Ground	No	No	310-612-3599
			Andy Johnson		IL	4/13/2020	4/17/2020	4/17/2020	Napa, CA	Released		Direct to Consumer	PULP	UPS	Temp Control-Ground	Temp Control-Ground	No	No	(510) 691-9570

PLEASE NOTE: If the option of **Update** does not display, the order is in a processing state that prevents us from making any changes. This may include the order already having been processed or canceled. Please check the **Status** of the order to verify.

Order statuses that cannot be Updated:

- Being Pick in Warehouse
- Ready to Ship
- Shipped
- Ready for Pickup
- Delivered

1. Select **Update Order** in the dropdown menu

General

Customer * Order Type *
Direct to Consumer

Order Info

Customer Order No * PO No./BOL
 Test MST1 Napa, CA

Order Date Requested Shipment Date *
 4/13/2020 4/29/2020

Warehouse * Inventory Type *
 Napa, CA Fulfillment (Tax Paid)

Ship To Contact * Ship to Company Email Address Phone
 Test Update test@wineshipping.com 707-993-69063

Street 1 * Street 2 City * State *
 50 Technology Ct Napa California

ZIP/Postal Code * Country *
 94574-2203 USA

Carrier * Carrier Service *
 FedEx Ground

Wineshipping Temp Control
 WS Will Call
FedEx
 UPS
 GSO

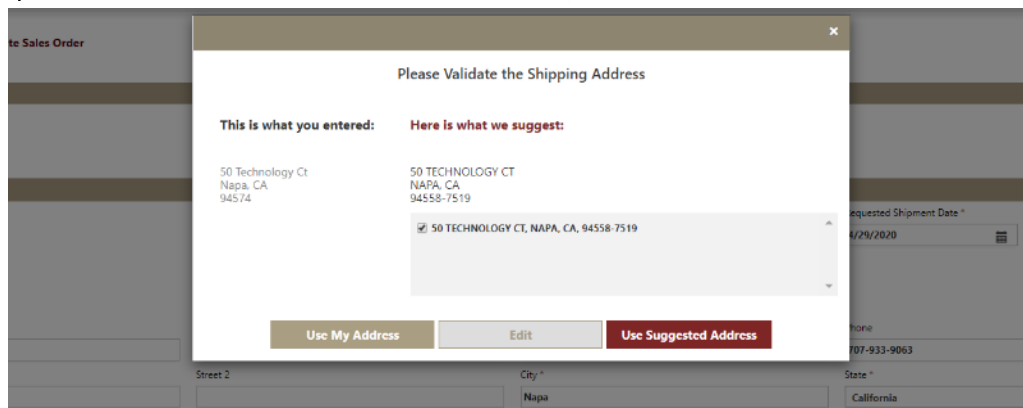
Product	Unit of Measure ↑	Item Category (Product)	Quantity
2016 SAUVIGNON BLANC CENTRAL COAST	750	Wine	1

Exit
Update Sales Order

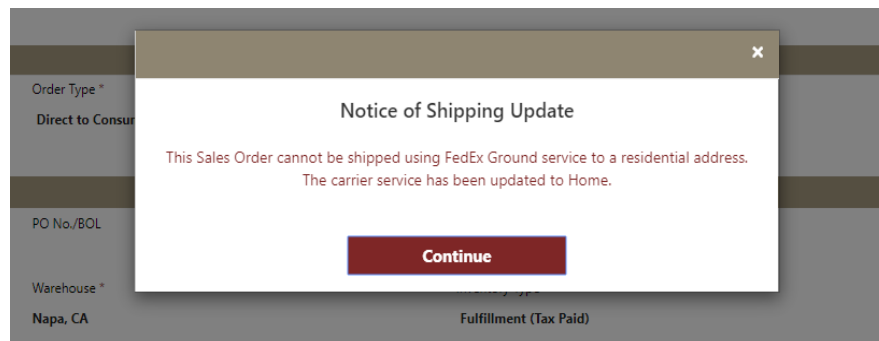
2. You can make the following **Updates** in the order details screen:

- Ship to Contact
- Ship to Company
- Street 1
- Street 2
- City
- State
- ZIP/Postal Code
- Phone
- Email Address
- Requested Shipment Date
- Carrier
- Carrier Service

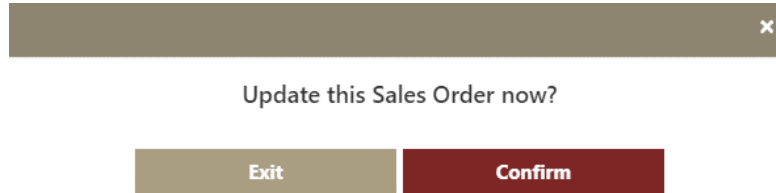
3. Click **Update Sales Order** in the bottom left corner of your screen



4. If applicable, when an order of FEX Ground is chosen for a residential delivery, we will automatically change the service to Home, providing a notification to the user as indicated.



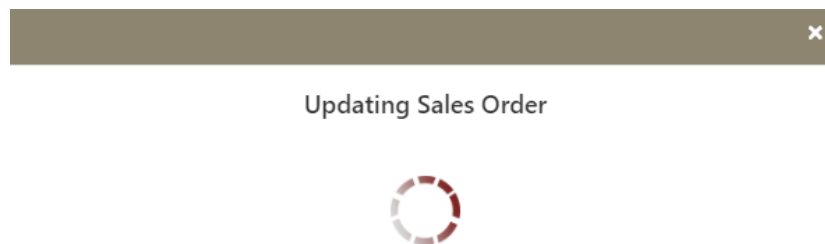
5. Upon selecting **Update Sales Order**, an address validation is happening with the carrier. A notification may appear and require you to confirm the address. You will have the option of selecting the suggested address provided by the carrier, **Edit** (change address), or **Use My Address**. You must select one of those option in order to continue with your Update.



Once confirmed, the update process will begin. In some instances, a Sales Order update will not be possible due to its current status.

Please check for a Connect Portal email which will indicate the status of the order. If the Sales Order update is not completed, please review the corresponding message.

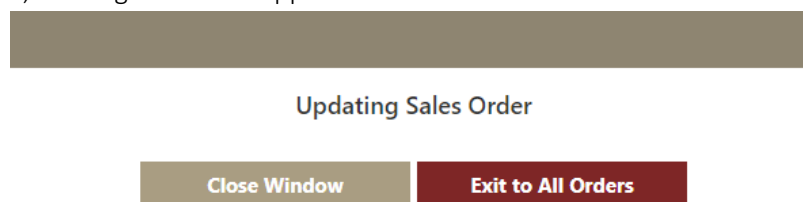
6. Click **Confirm** to continue or **Exit** if you don't want to proceed



Please note that in some instances, a Sales Order update is not possible due its current status of order processing.

Please check for a Connect Portal email which will indicate the status of the order. If the Sales Order update is not completed, please review the corresponding message.

7. Once completed, a dialogue box will appear to close the window or exit to all sales orders



Please check for a Connect Portal email which will indicate the status of the order. If the Sales Order update is not completed, please review the corresponding message.

A successful operation will receive an email notification confirming the Update.

Cancel Orders

Cancel an open sales order on the Wineshipping portal by selecting the dropdown arrow next to the order number. A Cancel option will display on all eligible orders.

Customer Order No	Customer	PO No./BOL	Ship to Contact	Ship to Company	State/Province	Order Date	Requested Ship Date	Ship Date	Warehouse	Status	Hold Reason	Order Type	Package Type	Carrier	Service	Service	Tracking No	Ice Pack	Ship To Phone
Test MST1			Clay Leslie		CA	4/13/2020	4/29/2020	4/17/2020	Napa, CA	Released		Direct to Consumer	PULP	FedEx	Ground	Ground		No	707-968-3362
			Chris Hussey		CA	4/13/2020	4/24/2020	4/24/2020	Napa, CA	Released		Direct to Consumer	PULP	FedEx	Ground	Ground		No	310-612-3599
442			Andy Johnson		IL	4/13/2020	4/17/2020	4/17/2020	Napa, CA	Released		Direct to Consumer	PULP	UPS	Temp Control-Ground	Temp Control-Ground		No	(510) 691-9570

PLEASE NOTE: If the option of **Cancel** does not display, the order is in a processing state that prevents us from making any changes. This may include the order already having been processed or canceled. Check the **Status** of the order to verify.

Order statuses that cannot be Canceled:

- Being Pick in Warehouse
- Ready to Ship
- Shipped
- Ready for Pickup
- Delivered

1. Select **Cancel** in the dropdown menu
2. Select **Cancel Sales Order**
3. Select **Exit** to stop the request or **Confirm** to proceed



Cancel this Sales Order now?



Once confirmed, the cancel process will begin. In some instances, a Sales Order cancel will not be possible due to its current status.

Please check for a Connect Portal email which will indicate the status of the order. If the Sales Order cancellation is not completed, please review the corresponding message. Please note that when a Sales Order cancellation is completed, it cannot be reversed.

4. Once completed, a dialogue box will appear to close the window or exit to all sales orders



Cancelling Sales Order



Please check for a Connect Portal email which will indicate the status of the order. If the Sales Order cancellation is not completed, please review the corresponding message.

A successful operation will receive an email notification confirming the Cancellation.

Order History

If an order has been Updated or Canceled, an Order History box will be displayed in the order details. This will allow the user to see the original order content and who made the Update or Cancel request when you click on the hyper link.

General			
Customer *	Order Type *		
Orin Swift	Direct to Consumer		

Order Info			
Customer Order No *	PO No./BOL	Order Date	Requested Shipment Date *
MOUADDITEMTST-442		4/13/2020	4/17/2020
	Warehouse *	Inventory Type *	
	Napa, CA	Fulfillment (Tax Paid)	
Ship To Contact *	Ship to Company	Email Address	Phone
Andy Johnson		ajohnson@wineshipping.com	(510) 691-9570
Street 1 *	Street 2	City *	State *
1691 ROOSA LN		ELK GROVE VILLAGE	Illinois
ZIP/Postal Code *	Country *		
60007-3138	USA		
Carrier *	Carrier Service *		Order History
UPS			MOUADDITEMTST-442 April 13, 2020 3:08 PM
			MOUADDITEMTST-442 April 13, 2020 8:58 AM

Example:

Home / Orders / [View Sales Order](#)

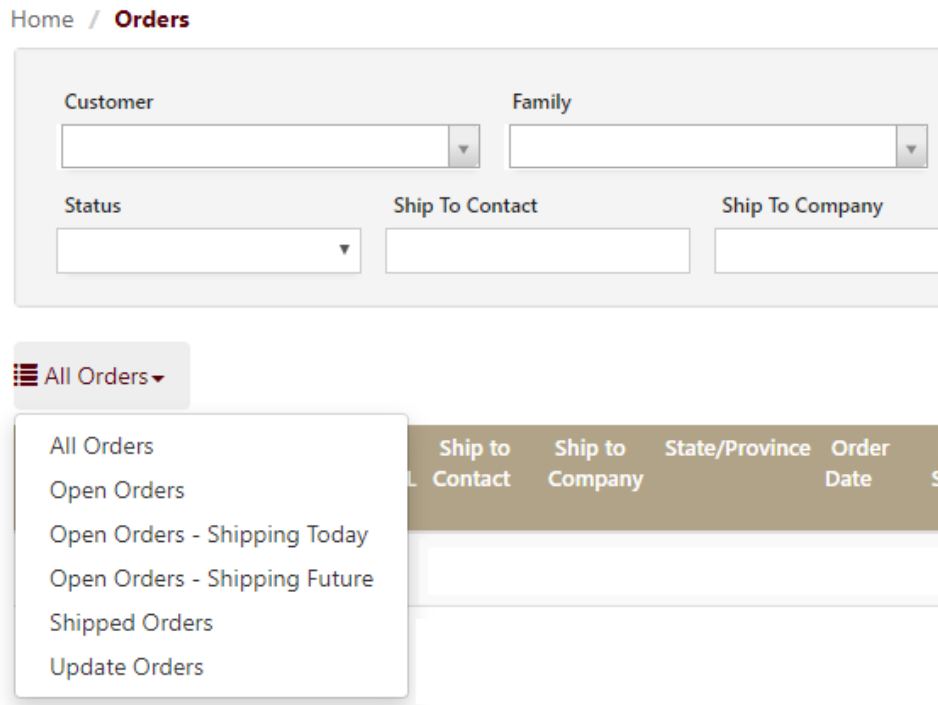
General			
Customer *	Order Type *	Send an order confirmation copy	Order Status
	Direct to Consumer		Canceled
Requestor First Name	Requestor Last Name	Requestor Email	Requestor Phone Number
Andy	Johnson	ajohnson@wineshipping.com	707-927-1388

Order Info			
Customer Order No *	PO No./BOL	Order Date	Requested Shipment Date *
MOUADDITEMTST-442		4/12/2020	4/20/2020
Select from Address Book	Warehouse *	Inventory Type *	Is it a Bonded Transaction
	Napa, CA	Fulfillment (Tax Paid)	<input checked="" type="radio"/> No <input type="radio"/> Yes
Ship To Contact	Ship to Company	Email Address	Phone
Tina E Holtzclaw		tinasckeekside@aol.com	(510) 691-9570
Street 1	Street 2	City *	State
2300 SAN PABLO AVE		PINOLE	CA
ZIP/Postal Code	Country *	Is it a Bonded Facility	Bonded Number
94564-1705	USA	<input checked="" type="radio"/> No <input type="radio"/> Yes	
<input type="checkbox"/> Save to Address Book	Include Card	Message in Card	Additional Insurance Value
Package Type	<input checked="" type="radio"/> No <input type="radio"/> Yes		
PULP		Freight Delivery Instructions	
Carrier *	Carrier Service *		
UPS	Ground		
Tracking No	Total Insurance Value		

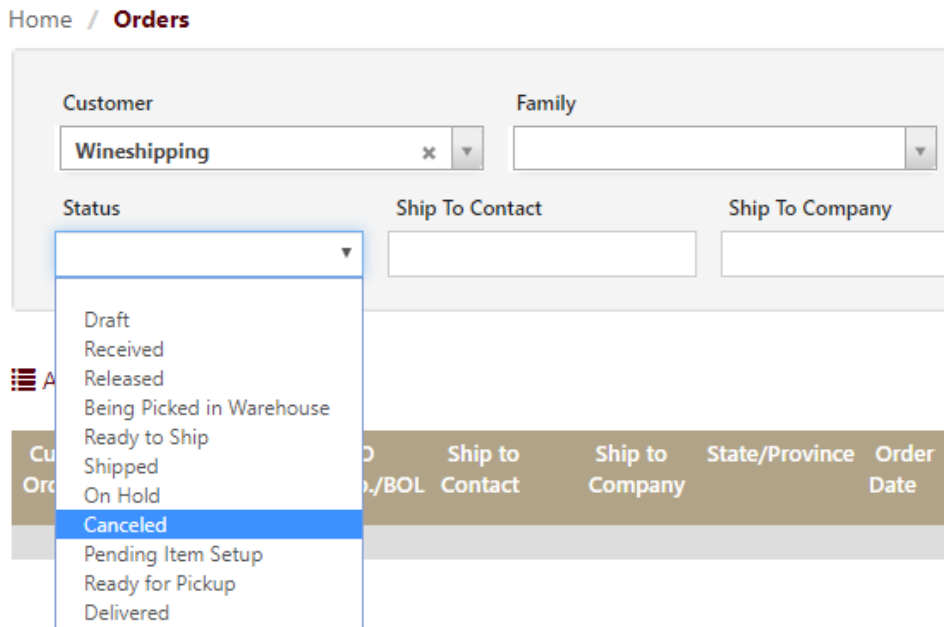
Item No	Description	Unit of Measure ↑	Item Category	Quantity
000000000210004649	2017 Mercury Head	750	Wine	1
OSCTISSUE	ORIN SWIFT TISSUE PAPER	EACH	Marketing Material	1

All Orders – Navigation and Filters

There is a new filter option in the Orders grid that allows filtering to all Sales Orders that can be Updated or Canceled. Additionally, the default sorting for the Orders grid is now newest to oldest based on Order Date.



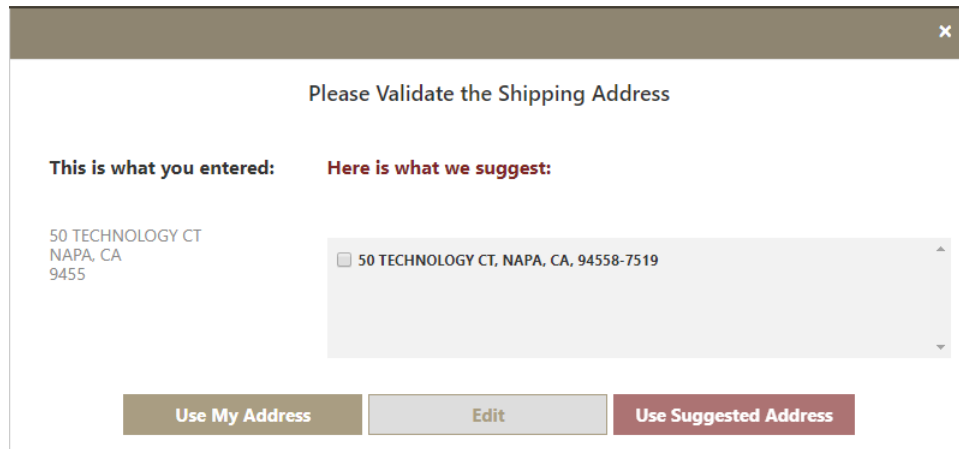
Under the Status filter, all previously Canceled Orders can be viewed by selecting Canceled.



Address Validation

As part of adding Update capabilities for Sales Orders, there is now integrated Address Validation built into the Connect Portal that will ensure the entered address information is validated against the chosen carrier as follows:

- UPS & TMC will be validated using Wineshipping's Address Validation service, which references UPS directly.
- FEX & FCC will be validated using the service, which references FEX directly.
- All other carriers for domestic USA addresses will be validated using the domestic validation service.



The screenshot shows a modal dialog box titled "Please Validate the Shipping Address". It is divided into two columns. The left column is headed "This is what you entered:" and contains the text "50 TECHNOLOGY CT", "NAPA, CA", and "9455" on separate lines. The right column is headed "Here is what we suggest:" and contains a single suggestion: "50 TECHNOLOGY CT, NAPA, CA, 94558-7519" with a small square icon to its left. At the bottom of the dialog, there are three buttons: "Use My Address" (dark blue), "Edit" (grey), and "Use Suggested Address" (red).

Address validation will function as described in each of the following scenarios.

- When an address validated using our service results in no errors and a single match, the validation will be transparent to the user and automatically performed, allowing the Portal user to continue the Update Sales Order process uninterrupted.
- When an address validated using our service results in no errors and more than a single match, suggested address matches are returned in the order of best match. Portal users will have the option to edit or use the address they entered or select from one of Wineshipping's suggestions and continue.
- When an address validated using our service results in no errors and no matches, Portal users will have the option to edit or use the address they entered and continue.

Note: All form address fields are checked for errors during submission.