

Changing Customer Orders

To change an existing order, determine whether the order was authorized or captured and whether it is in Guest mode or connected to a registered customer account with credit card stored. Other payment gateways like PayPal also require different steps.

I. **Authorized** only (order On Hold), **Guest** customer

A. Credit Card Strategy:

Re-authorize only if you have their card data since it isn't stored

1. WP Admin > WooCommerce > Orders
2. Open the order in question
3. Change it to Pending Payment status, click Update
4. Edit the cart items and shipping in the order, Save and click Recalculate
5. Click Customer Payment Page link
6. Do not use a stored card, as this is stored on the admin account, not the customer's
7. Click the link Use a New Card and enter the credit card
8. Click Place Order and you now have an On Hold order authorized for the new amount
9. Go back to the order editing screen using your admin bar on top to find it again
10. Proceed as usual, likely clicking Capture Charge to put the order into Processing status

B. PayPal Strategy:

1. Switch the order to Credit Card by following the steps above
-or-
2. Make changes to the order and put into Pending Payment status, make the customer account and set that on the order. Then have them log in, find the order in their account, click Pay button to pay with their PayPal account

II. **Authorized** only (order On Hold), **Registered** customer

A. Credit Card Strategy:

Re-authorize their card for the new amount, provided card was stored

1. WP Admin > WooCommerce > Orders
2. Open the order in question
3. Change it to Pending Payment status, click Update
4. Edit the cart items and shipping in the order, Save and click Recalculate

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5. Click on the Profile link
6. Click the Switch To link to become the customer
7. Click the Orders link
8. Click on the Pay button adjacent the order in question
9. Scroll down and ensure that a stored CC is selected
10. Click Place Order button
11. Click the My account link in the header
12. Click the *Switch Back To...* footer link to get back to your admin account
13. Go back to the order editing screen using your admin bar on top to find it again
14. Proceed as usual, likely clicking Capture Charge to put the order into Processing status

B. PayPal Strategy

1. Switch the customer to Credit Card by following the steps above
-or-
2. Make changes to the order and put into Pending Payment status. Then have them log in, find the order in their account, click Pay button to pay with PayPal

III. Authorized and **Captured** (order Processing), **Guest** customer

A. Credit Card Strategy:

Create a new order and you must have their card data for a new order

1. WP Admin > WooCommerce > Orders
2. Click Add Order button
3. Click the pencil icons next to Billing and Shipping and complete these sections
4. Add cart items and shipping to the order and click Save button to save the cart and Recalculate button if needed
5. Click the Create button to save the order
6. Click Customer Payment Page link
7. Do not use a stored card, as this is stored on the admin account, not the customer's
8. Click the link Use a New Card and enter the credit card
9. Click Place Order and you now have an On Hold order authorized for the new amount
10. Go back to the order editing screen using your admin bar on top to find it again
11. Proceed as usual, likely clicking Capture Charge to put the order into Processing status

B. PayPal Strategy:

Create a new order in Pending Payment status, make and attach a customer account,.
Then have them log in, find the order in their account, click Pay to pay with PayPal

IV. Authorized and **Captured** (order Processing), **Registered** customer

A. Credit Card Strategy:

Create a new order and use their stored payment if they have it available

1. WP Admin > WooCommerce > Orders
2. Click Add Order button
3. Click the Customer field and search for the customer record by name
4. Add cart items and shipping to the order and click Save button to save the cart and Recalculate button if needed
5. Click the Create button to save the order
6. Click on the Profile link
7. Click the Switch To link to become the customer
8. Click the Orders link
9. Click on the Pay button adjacent the order in question
10. Scroll down and ensure that a stored CC is selected
11. Click Place Order button
12. Click the My account link in the header
13. Click the *Switch Back To...* footer link to get back to your admin account
14. Go back to the order editing screen using your admin bar on top to find it again
15. Proceed as usual, likely clicking Capture Charge to put the order into Processing status

B. PayPal Strategy:

Create a new order in Pending Payment status. Then have them log in, find the order in their account, click Pay to pay with PayPal