



Creating a New Order

v 1.1

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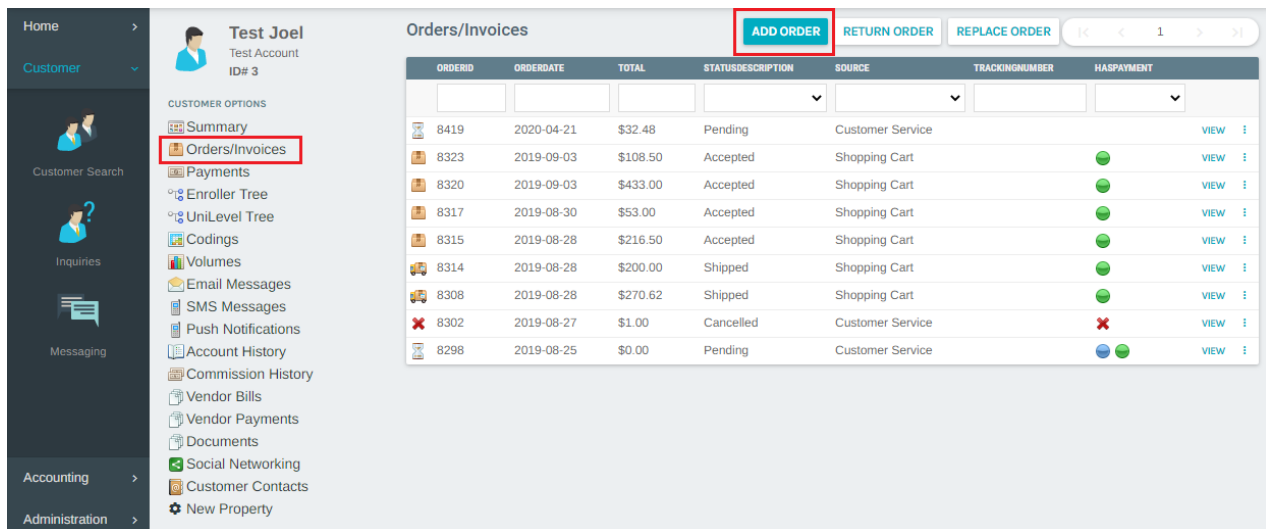
New Orders

Creating a new order in Exigo Admin is a simple process. The fields required to submit an order are displayed in the following tabs:

- Ship to
- Items
- Ship Method
- Payment

To Create a new Order

- Go to **Customer>>Customer Search** and select the customer that the order will be requested for, then in the left side column, click on **Order/Invoices**.
- In the top of the screen, locate the button **“ADD ORDER”**, a new pop-up screen will appear and display the first tab, the **Ship To** Information.



ORDERID	ORDERDATE	TOTAL	STATUSDESCRIPTION	SOURCE	TRACKINGNUMBER	HASPAYMENT	
8419	2020-04-21	\$32.48	Pending	Customer Service			VIEW
8323	2019-09-03	\$108.50	Accepted	Shopping Cart		●	VIEW
8320	2019-09-03	\$433.00	Accepted	Shopping Cart		●	VIEW
8317	2019-08-30	\$53.00	Accepted	Shopping Cart		●	VIEW
8315	2019-08-28	\$216.50	Accepted	Shopping Cart		●	VIEW
8314	2019-08-28	\$200.00	Shipped	Shopping Cart		●	VIEW
8308	2019-08-28	\$270.62	Shipped	Shopping Cart		●	VIEW
8302	2019-08-27	\$1.00	Cancelled	Customer Service		✘	VIEW
8298	2019-08-25	\$0.00	Pending	Customer Service		●	VIEW

Ship To

In the Ship To tab, you select where the items will be delivered to. Shipping Address, Mailing Address and Other Address are pulled from the user profile and cannot be updated in this section. To change one of these three addresses, you will need to update them at the Customer Summary level. The fourth option, Drop Ship Address, allows for a different address to be entered. Once this shipping information is entered, the system will require you to click “Check” to validate the correct postal code. You may also enter the Email and Phone.

Order Detail

Ship To | Items | Ship Method | Payment

Choose an address to Ship the Order to:

Shipping Address
Test Account
Test Joel
501 Sycamore LN Apt 1915
Euleless TX 76039
[EDIT](#) [CHECK](#)

Mailing Address
Test Account
Test Joel
Texas
[EDIT](#) [CHECK](#)

Other Address
Test Account
Test Joel
Texas
[EDIT](#) [CHECK](#)

Drop Ship Address

Country United States ▼

Company Test Account

First Name Test

Last Name Joel

Address 501 Sycamore LN Apt 1915

City Euleless Texas ▼ 76039
[CHECK](#)

Email testor@testor.com

Phone 214-867-5309

[CANCEL](#) [ADD ORDER](#)

Items

The products or Items for the order will be displayed in this section, which may be physical or virtual. Physical Items are shipped from Warehouses to the end Customer. Virtual Items are not shipped from Warehouses. Virtual Items may include items purchased at an event, items that are downloadable, items that give the Distributors access to their Web Site and Mobile App, etc.

- To add a new Item, simply click “ADD ITEM”, enter the item code or description and click “SEARCH ITEMS”.

Manage Order Items ✕

Found: 3 Items

Item Code: SEARCH ITEMS

Enter item code or search string. Use Up and Down arrows to navigate through the results

ITEM CODE	DESCRIPTION	PRICE EACH
200	Distributor Enrollment Fee	\$ 0.00
201	Enrollment Pack 1	\$ 0.00
202	Enrollment Pack 2	\$ 0.00

CANCEL
ADD ITEM

- You will see the products that match the item code listed. Click on the product to add the Quantity and to save click “ADD ITEM”
- Repeat these steps for each item you would like to add to the order.

Ship Method

In the Ship Method tab you can select the shipping method. These ship methods are configured by the client during market setup. Instruction/Notes should be filled out if any additional information is needed to ensure delivery of the package.

Order Detail

Ship To

Items

Ship Method

Payment

Ship Method

Express Shipping \$0.00

Ground Shipping \$0.00

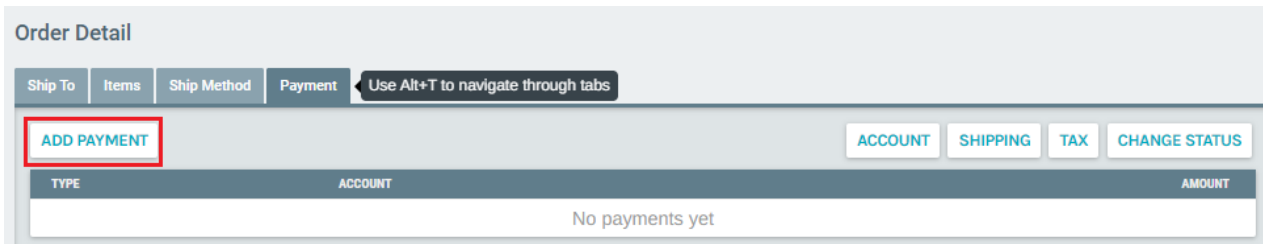
Instructions/Notes Leave the package at the front door

CANCEL
ADD ORDER

Payment

In the Payment tab you can validate the amount to be paid and the available payment options.

- Simply click on “ADD PAYMENT” to enter the payment information for the order.



Order Detail

Ship To | Items | Ship Method | **Payment** Use Alt+T to navigate through tabs

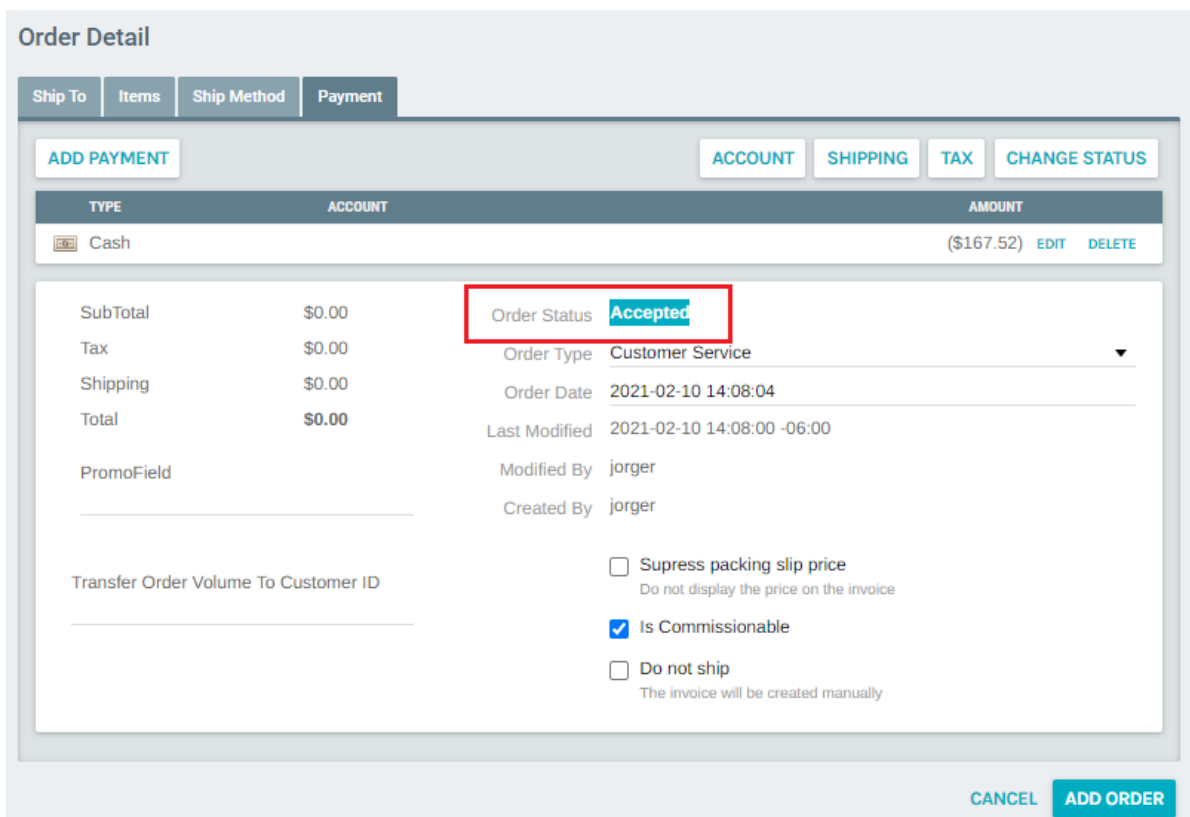
ADD PAYMENT ACCOUNT SHIPPING TAX CHANGE STATUS

TYPE	ACCOUNT	AMOUNT
No payments yet		

- Select the desired payment method from the dropdown list next to “**Payment Method**”.
- Populate the remaining required fields; Amount, Name on card and billing Address, etc.
- Available Payment Methods are configured by your system administrator.

Once the Payment method is added, it will display the amount to be paid.

In the screenshot below, please note the order status is set to “Accepted”. When selecting Cash as the payment method, the order will default to an Accepted Status. The next section covers Payment Statuses in more detail.



Order Detail

Ship To | Items | Ship Method | **Payment**

ADD PAYMENT ACCOUNT SHIPPING TAX CHANGE STATUS

TYPE	ACCOUNT	AMOUNT
Cash		(\$167.52) EDIT DELETE

SubTotal	\$0.00	Order Status Accepted
Tax	\$0.00	Order Type Customer Service
Shipping	\$0.00	Order Date 2021-02-10 14:08:04
Total	\$0.00	Last Modified 2021-02-10 14:08:00 -06:00
PromoField		Modified By jorger
		Created By jorger
Transfer Order Volume To Customer ID		<input type="checkbox"/> Suppress packing slip price <small>Do not display the price on the invoice</small>
		<input checked="" type="checkbox"/> Is Commissionable
		<input type="checkbox"/> Do not ship <small>The invoice will be created manually</small>

[CANCEL](#) [ADD ORDER](#)

Order Statuses

- a. **Pending:** All Orders Begin in a Pending Status.
- b. **CC Declined:** This Status is utilized when a Credit Card is Declined – most often found in Auto Orders.
- c. **ACH Declined:** This Status is utilized when a Bank Draft is Declined – most often found in Auto Orders.
- d. **Cancelled:** This Status is used when a Customer decides they do not wish to complete the Order. Orders are never deleted. Caution: Placing an Order into Cancelled Status does not process a Return of Funds.
- e. **CC Pending:** This Status is used exclusively for Auto Orders to be paid with a Credit Card.
- f. **ACH Pending:** This Status is used exclusively for Auto Orders to be paid with a Bank Draft.
- g. **Accepted:** This Status is used when an Order receives Payment in Full. This Status is Commissionable.
- h. **Printed:** This Status is used when an Order has been sent to the Warehouse for fulfillment. This Status is Commissionable.
- i. **Shipped:** This Status is used when the Warehouse ships the Order and returns the Tracking Number(s) to Exigo. This Status is Commissionable


Once all the required information was populated the final step is to click “ADD ORDER” the system will submit the order to be shipped accordingly to the shipping method selected.

Order Number 8441 Accepted

[EDIT ORDER](#)
[RMA](#)
[CHANGE STATUS](#)
[COMMISSIONS](#)
[HISTORY](#)
[EMAIL](#)

Invoice Details

Test Order




: Express Shipping

To	Order Info
Test Account Test Joel 501 Sycamore LN Apt 1915 Euless, TX 76039	Order No.: 8441 Order Types: Customer Service Shipping Method: Express Shipping Customer ID: 3 Customer Name: Test Joel Sales Tax ID: Date: 2021-02-10 14:08:04 -06:00 Email: testor@testor.com Phone: 214-867-5309 Created By: Jorger Fulfilled By:

Payment Info

Payment Date: 2021-02-10 14:09:15 -06:00
 Payment Method: Cash
 Amount: \$-167.52
 Payee Name:

Quantity	ItemID	Description	Price	Total
1	201	Enrollment Pack 1	\$0.00	\$0.00
			Subtotal:	\$0.00
			Shipping:	\$0.00
			Taxes:	\$0.00
			Total:	\$0.00
			Amount Paid:	\$-167.52



[CLOSE](#)