



Exigo User Manual: Customer Maintenance

v1.1

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Customer Management

Exigo Admin enables you to quickly add, view, edit, and delete customer records and their corresponding orders. You may access customer records from multiple locations in Exigo Admin, such as the Today page or the Customer menu.

Note: Each function and section of Exigo requires security access. Only users with access to the menu will be able to see its functions.

Adding a New Customer

You may add a new customer from the **Today**, **Customer Search**, or **Customer Details** pages.

- While on the Today screen, click on **Add a New Customer** in the left column.

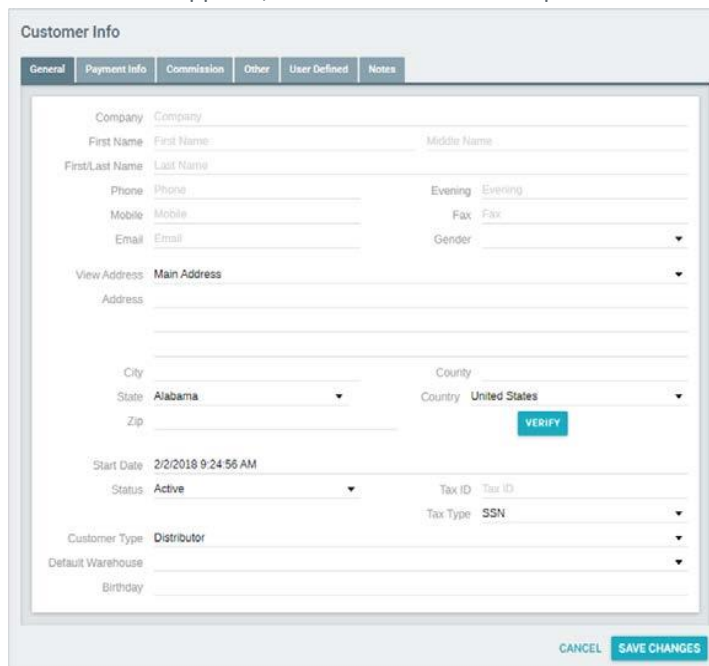


- While on the Customer Search or Customer Details page, click on **New Customer** in the upper right.



ADD CUSTOMER WINDOW – General tab

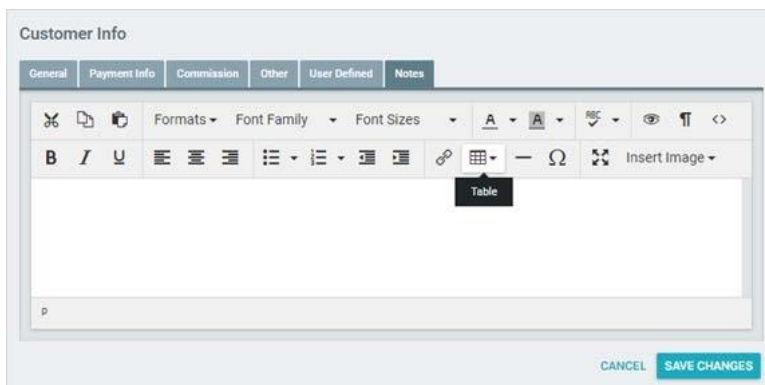
When the **Add Customer** window first appears, the **General** tab will be open.



1. In the General tab, enter the customer’s contact information.
2. You may verify the zip code by clicking on the button. *Note: Clients may designate required fields in the Administration section.*
3. Enter the customer information for the remaining tabs, shown on the following pages, and click OK to save the customer information. *Note: You may edit customer information once it is saved.*

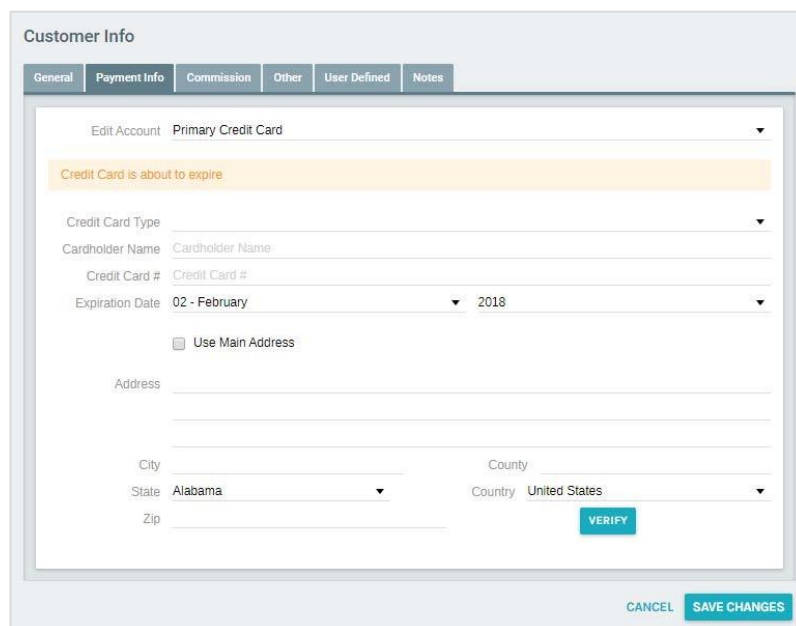
ADD CUSTOMER WINDOW - NOTES TAB

1. In the Add Customer window, click on the Notes tab.



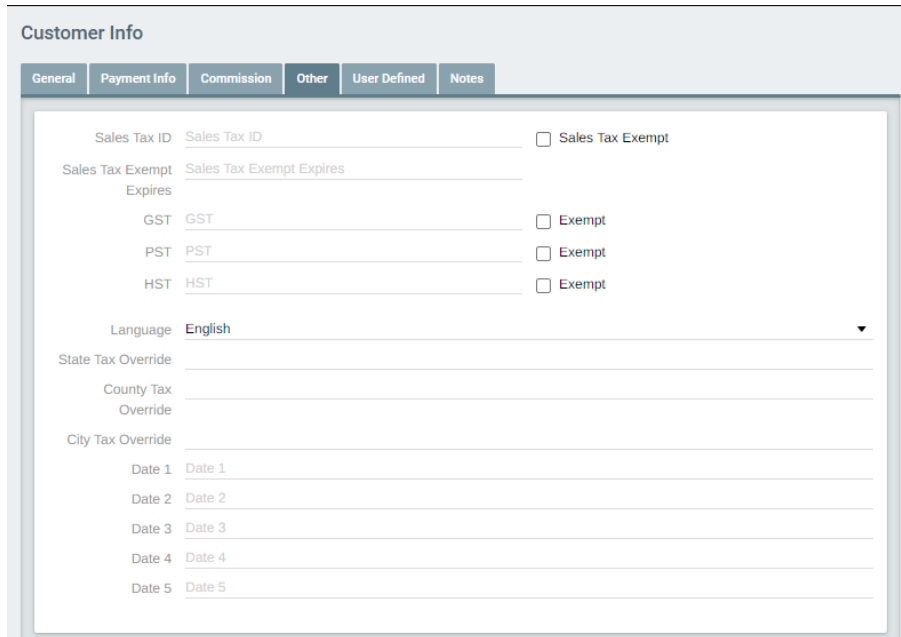
2. Enter the notes for the new customer.
3. Once the customer information is saved, the notes will appear in the Customer Details page.

ADD CUSTOMER WINDOW - PAYMENT INFO TAB



- Enter payment information for automatic billing and payment. In the Add Customer window, click on the Payment Info tab.

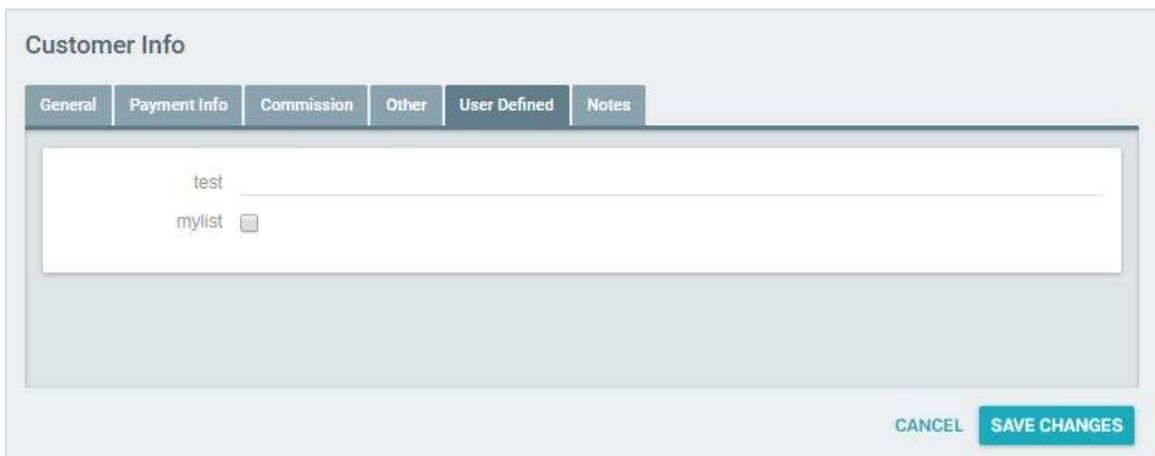
ADD CUSTOMER WINDOW - OTHER TAB



- You may enter the sales tax ID, and its expiring date.
- You may use the GST, PST and HST fields to denote sales exempt certificates for Canada.

ADD CUSTOMER WINDOW - USER DEFINED FIELDS TAB

1. In the Add Customer Window, click on the User-Defined Fields tab.

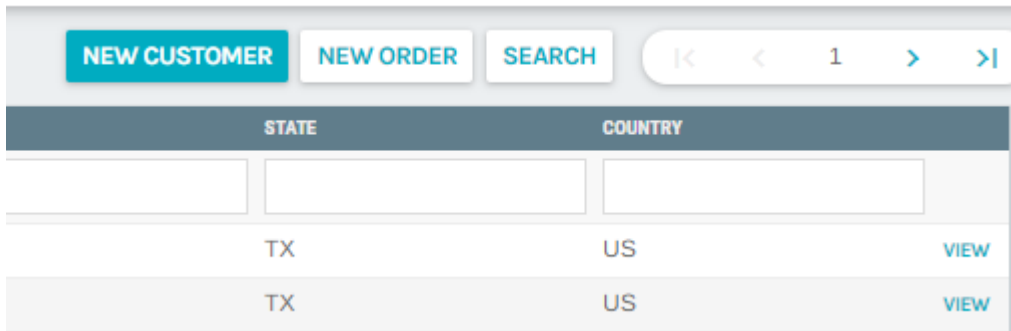


- You may define criteria unique to your individual company in Administration.

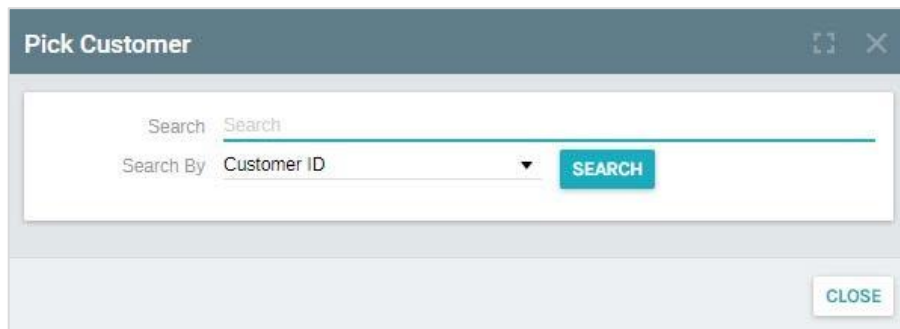
Searching for an Existing Customer

You may search for an existing customer from the Customer Search page.

1. On the top right User Menu, select Search.

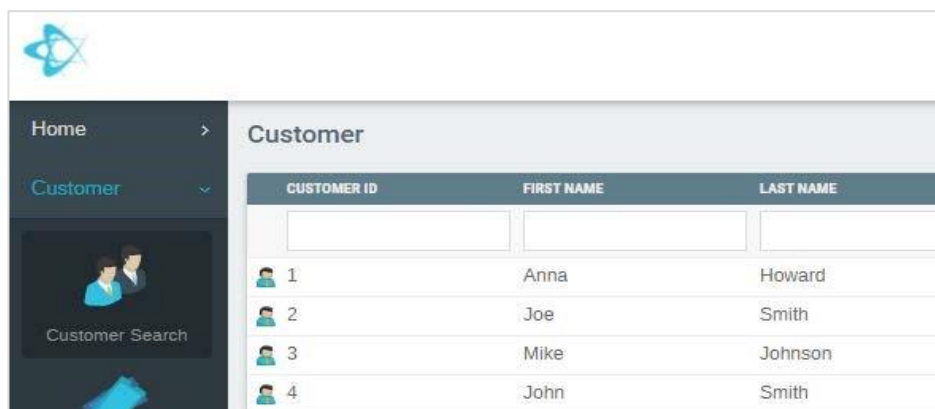


2. Select the field to search by and enter a value.



CUSTOMER SEARCH PAGE

- The Customer Search page will appear with all the existing customers listed.

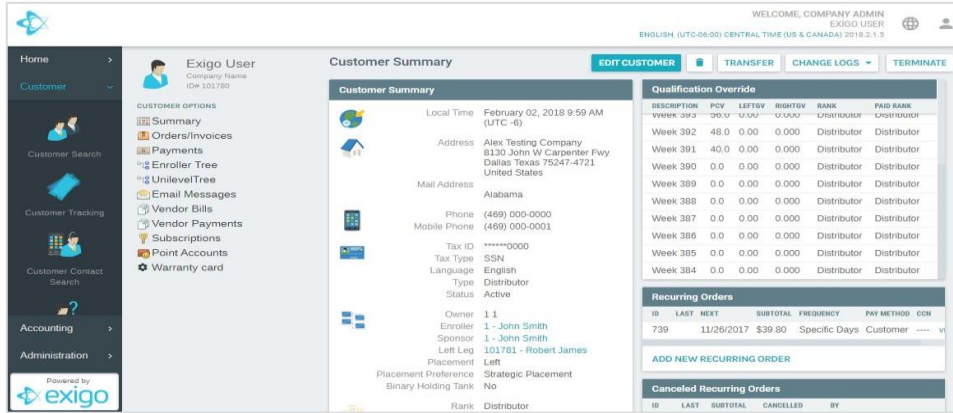


Viewing Customer Information

You may view the customer details by selecting a customer in the Customer Search page. The Customer Details page will appear.

CUSTOMER DETAILS PAGE

- You may edit the customer information as described on the following pages.



Viewing and Editing Customer Details

The contact and user-definable fields can be edited by clicking on Edit Customer in the Customer Information page.

EDIT CUSTOMER WINDOW

- The Edit Customer window will appear for you to make your changes.
- The Edit Customer window contains the same tabs and information as the Add New Customer window.

Customer Info

General Payment Info Commission Other User Defined Notes

Company: Test Company

First Name: Exigo Middle Name: _____

First/Last Name: User

Phone: (469) 000-0000 Evening: Evening

Mobile: (469) 000-0001 Fax: Fax

Email: _____ Gender: Male

View Address: Main Address

Address: Alex Testing Company
8130 John W Carpenter Fwy

City: Dallas County: Dallas

State: Texas Country: United States

Zip: 75247-4721

Start Date: 11/15/2017 12:00:00 AM

Status: Active Tax ID: *****0000

Customer Type: Distributor Tax Type: SSN

Default Warehouse: Main

Birthday: _____

Viewing Customer Change Log

1. View the Customer Change Log by clicking on Change Logs in the Customer Summary page.



2. The Customer Change Log window contains a history of changes made to different users.

Customer Change Log		
DATE	USER	CHANGES
1/31/2018 7:39:46 PM -06:00	Administrator	PayableTy changed from "Check" to "Payment Card".
11/22/2017 1:49:52 PM -06:00	Administrator	SMSUnsubscribeDate changed from "11/22/2017 1:49:00 PM" to "".
11/22/2017 1:49:52 PM -06:00	Administrator	EntityTy changed from "1" to "3".
11/22/2017 1:49:06 PM -06:00	Administrator	SMSUnsubscribeDate changed from "" to "11/22/2017 1:49:00 PM".
11/22/2017 1:47:55 PM -06:00	Administrator	UnsubscribeDate changed from "11/16/2017 10:01:00 AM" to "". SubscribeDate changed from "" to "11/22/2017 1:47:55 PM".
11/22/2017 12:48:40 PM -06:00	Administrator	CustomerStatus changed from "Inactive" to "Active".
11/16/2017 10:23:08 AM -06:00	Administrator	CanLogin changed from "False" to "True". LoginName changed from "Term_101780_20171116094420" to "Term_101780_20171116095534".
11/16/2017 10:00:33 AM -06:00	Administrator	LoginName changed from "Term_101780_20171116095534" to "Term_101780_20171116094420".
11/16/2017 9:55:32 AM -06:00	Administrator	LoginName changed from "Term_101780_20171116094420" to "Term_101780_20171116095534".
11/16/2017 9:54:44 AM -06:00	Administrator	CustomerStatus changed from "Inactive" to "Active".
11/16/2017 9:44:19 AM -06:00	Administrator	Email changed from "alexr@exigo.com" to "". CanLogin changed from "True" to "False".
11/16/2017 9:43:59 AM -06:00	Administrator	CanLogin changed from "False" to "True". LoginName changed from "" to "Alex Login".
11/15/2017 7:33:02 PM -06:00	Administrator	Address1 changed from "8130 John W Carpenter Fwy " to "Alex Testing Company". A


CLOSE

Viewing and Editing Customer Login Access

The login access for a customer can be changed by clicking on Edit Login in the Customer Details page.

EDIT LOGIN WINDOW—LOGIN TAB

The Edit Login window will appear.



The screenshot shows a window titled "Login". On the left is a dark sidebar with a white minus sign icon. The main content area contains the following text: "Login Name ExigoUserTest", "Password T*****123", a blue radio button followed by "Login to Test Back Office", and a blue "EDIT LOGIN" link at the bottom left.

1. Select if you want the customer to login.
2. Select the Login Profile for the customer. These are defined in the Administration section.
3. Enter the login name.
4. Enter the password.

Note: If you use a mail client other than Exigo, it may take up to an hour for the password changes to take effect.

Viewing and Editing the Customer's Web Alias

The customer's web alias, or user name appears throughout Exigo Office as well as in the Contacts.

The web alias and welcome greeting in the top right window of Exigo Office can be changed by clicking on Modify Web Info in the Customer Details page.

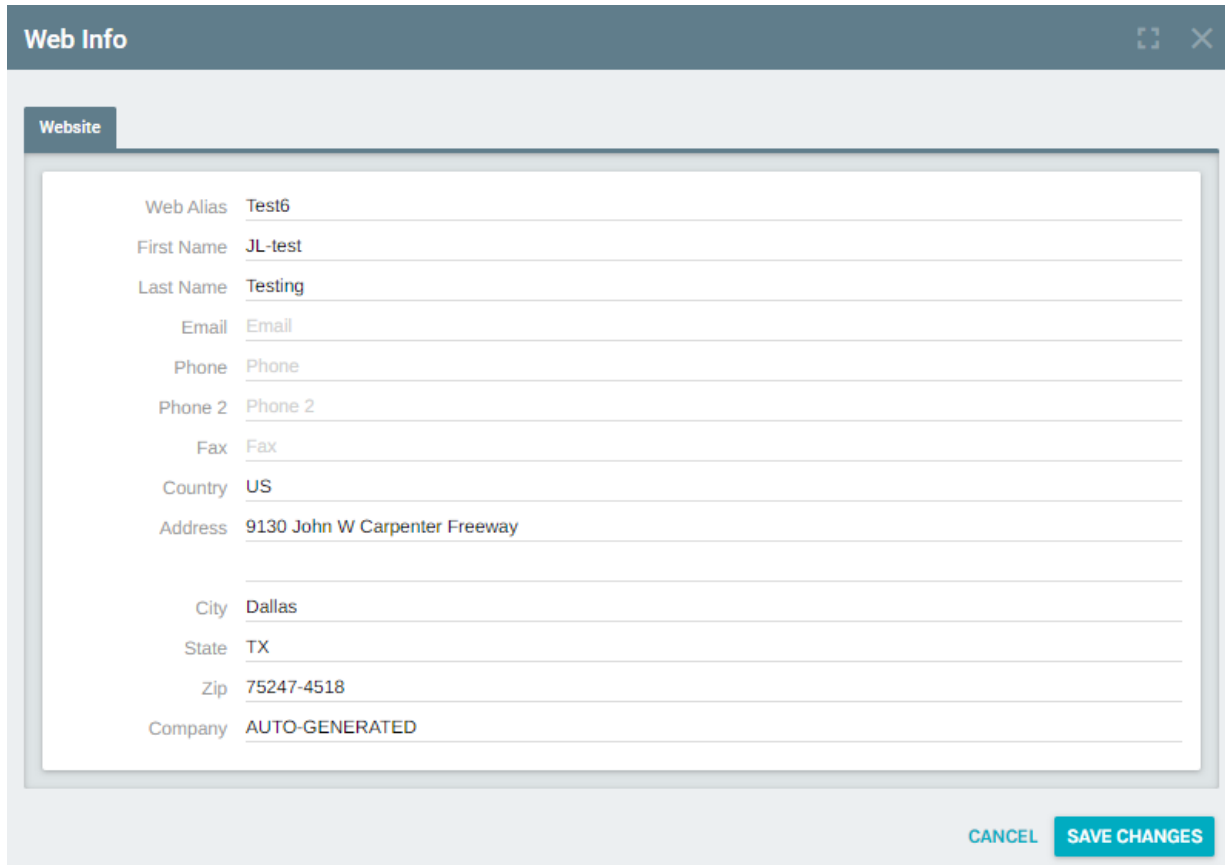


The screenshot shows a section titled "Website". The main content area contains the text "Customer does not have web info setup." and two blue links: "CREATE WEB INFO" and "CHANGE LOG".

WEB INFO WINDOW

The Web Settings window will appear for you to make your changes to:

- Web Alias: the name identifying the user for online chats and emails.
- First and Last Name: the user's first and last names
- Contact Information



Web Info

Website

Web Alias	Test6
First Name	JL-test
Last Name	Testing
Email	Email
Phone	Phone
Phone 2	Phone 2
Fax	Fax
Country	US
Address	9130 John W Carpenter Freeway
City	Dallas
State	TX
Zip	75247-4518
Company	AUTO-GENERATED

CANCEL **SAVE CHANGES**

Viewing and Editing Customer Notes

You may edit the customer notes from the Customer Details page or the Edit Customer window.

CUSTOMER DETAILS

1. Click on the Edit Notes button in the Customer Details page.



Notes

 test note!

EDIT NOTES

At a Glance:

EDITING CUSTOMER INFORMATION

The table below quickly outlines how to change specific customer information.

If you want to edit...	Go to...
Address	Name/Address tab in the Edit Customer Window through the Customer Details page
Birthday	Other tab in the Edit Customer Window through the Customer Details page
Checking Account Information	Payment Info tab in the Edit Customer Window through the Customer Details page
Company Name	Name/Address tab in the Edit Customer Window through the Customer Details page
Company Owner	Other tab in the Edit Customer Window through the Customer Details page
Credit Card Information	Payment Info tab in the Edit Customer Window through the Customer Details page
Currency	Other tab in the Edit Customer Window through the Customer Details page
Customer Gender	Name/Address tab in the Edit Customer Window through the Customer Details page
Customer Notes	Notes tab in the Edit Customer Window through the Customer Details page OR Click on Modify Notes under the Notes section in the Customer Details page
Customer Status	Other tab in the Edit Customer Window through the Customer Details page.
Customer Title	Name/Address tab in the Edit Customer Window through the Customer Details page
Customer Type	Other tab in the Edit Customer Window through the Customer Details page
Demographic Information	Name/Address tab in the Edit Customer Window through the Customer Details page
Email Address	Name/Address tab in the Edit Customer Window through the Customer Details page
Email Group	Email Groups tab in the Edit Customer Window through the Customer Details page
Fax Number	Name/Address tab in the Edit Customer Window through the Customer Details page
Login Access	Customer Login section in the Customer Details page
Mail Broadcast Group	Email Groups tab in the Edit Customer Window through the Customer Details page
If you want to edit...	Go to...
Mailing Address	Name/Address tab in the Edit Customer Window through the Customer Details page
Name	Name/Address tab in the Edit Customer Window through the Customer Details page
Payment Information	Payment Info tab in the Edit Customer Window through the Customer Details page
Phone Number	Name/Address tab in the Edit Customer Window through the Customer Details page
Social Security Number	Other tab in the Edit Customer Window through the Customer Details page
Tax Exempt	Other tab in the Edit Customer Window through the Customer Details page
Tax Status	Other tab in the Edit Customer Window through the Customer Details page
User-Defined Fields	User Defined Fields tab in the Edit Customer Window through the Customer Details page
Web Alias	Web Info section in the Customer Details page
Welcome Greeting	Web Info section in the Customer Details page

Adding an Order

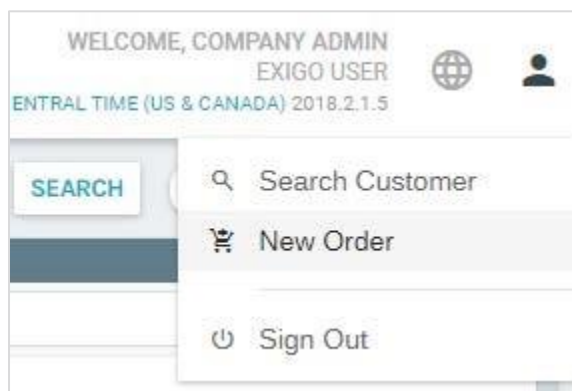
You may enter an order for a customer from the Customer Details page.

USER MENU

You may place a new order from the User Menu, Customer Search, Customer Summary or Order/Invoices pages.

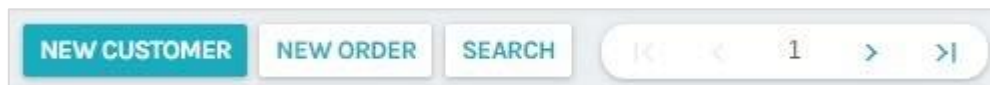
User Menu

1. On the top right User Menu, select New Order.



Customer Search

1. From the Customer Search page, click New Order on the top navigation.



2. Click on the New Order button.
3. The Order window will appear.


Orders/Invoices

1. From the Order/Invoices page, click the Add Order button on the top navigation.



Customer Summary

1. From the Accounting section, Click on Create a New Order.

Accounting		
DESCRIPTION	BALANCE	
 Dollars (US)	\$322.06	VIEW
CREATE NEW ORDER ADJUST BALANCE VIEW ACCOUNTING STATEMENT VIEW VENDOR TRANSACTION HISTORY VIEW VOLUME TRANSFER STATEMENT		

ORDER WINDOW - SHIP TO TAB

The Order window will appear with the Ship To tab open. Enter the information in the Ship To tab as well as the other tabs to complete the order. Once the order is saved, it will appear in the Order History list.

Order Detail

Ship To
Items
Ship Method
Payment

Choose an address to Ship the Order to:

Shipping Address
 Alex Testing Company
 Alex Tester Rivera
 Alex Testing Company
 8130 John W Carpenter Fwy
 Dallas TX 75247-4721
[EDIT](#) [CHECK](#)

Mailing Address
 Alex Testing Company
 Alex Tester Rivera
 AL
[EDIT](#) [CHECK](#)

Drop Ship Address

Country United States ▼

Company Alex Testing Company

First Name Alex Tester

Last Name Rivera

Address

City AA Military ▼

[CHECK](#)

Email

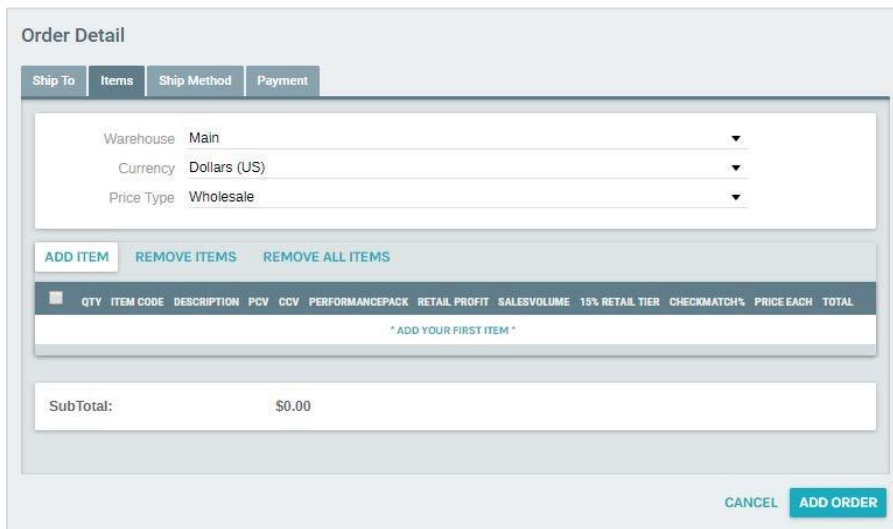
Phone (469) 000-0000

CANCEL
ADD ORDER

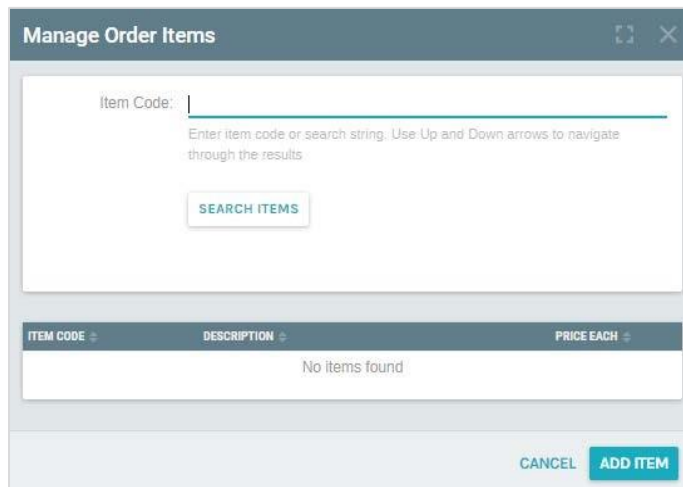
1. Select the shipping address for the order from:
 - The customer’s shipping address as entered in the Customer Details Add/Edit Customer window—Name and Address tab.
 - The customer’s mailing address as entered in the Customer Details Add/Edit Customer window—Name and Address tab.
 - A new mailing address.
2. Enter the email address and phone number.

ORDER WINDOW - ITEMS TAB

The Items tab will not have any items selected when it first appears.



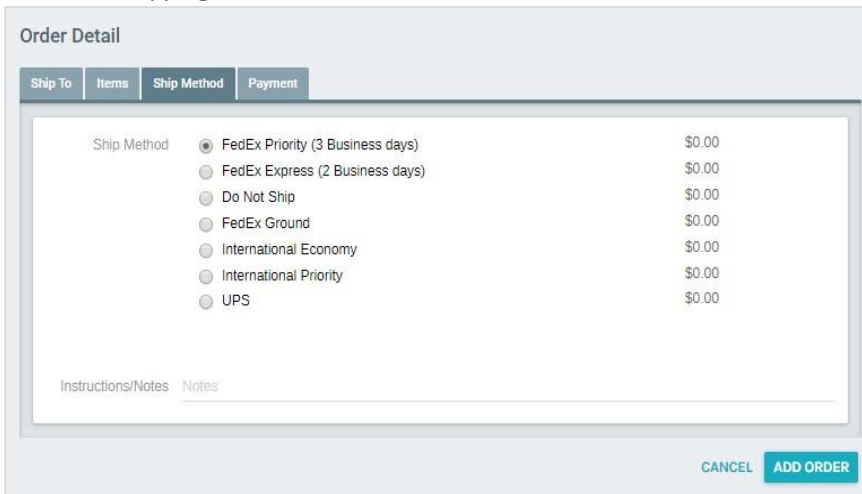
1. The default warehouse will appear. If you need to change the warehouse, and have access to do so, click on the arrow next to warehouse to select another warehouse.
2. The customer’s default currency will appear, as entered in the Customer Details—Other tab. You may change the customer currency by clicking on the arrow next to currency.
3. Click on the Add Item button to add an item to the order. The Order Item window will appear.



- Enter the item code. And Click Search.
 - The product description assigned to the code will appear.
 - You may change the product description.
 - Enter the quantity to be purchased.
 - The item price will appear when the item code is entered. You may change the price by checking the box next to Override Price.
 - The total (quantity) (item price) will automatically appear.
 - Click Save Changes to close the window and add the item to the order.
4. Continue adding items to the order.
 5. You may remove an unwanted item by selecting it and clicking on the Remove Items.
 6. You may edit an item by selecting it and clicking on the Edit button.
 7. The Order Item window shown on the previous page will appear.

ORDER WINDOW - SHIP METHOD TAB

1. Select the shipping method for the order.



Order Detail

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

Ship Method		
<input checked="" type="radio"/> FedEx Priority (3 Business days)		\$0.00
<input type="radio"/> FedEx Express (2 Business days)		\$0.00
<input type="radio"/> Do Not Ship		\$0.00
<input type="radio"/> FedEx Ground		\$0.00
<input type="radio"/> International Economy		\$0.00
<input type="radio"/> International Priority		\$0.00
<input type="radio"/> UPS		\$0.00

Instructions/Notes

CANCEL **ADD ORDER**

Note: The shipping methods are entered in Administration.

2. Select the shipping method that will be used.
3. If you have any special handling instructions to be printed on the invoice or packing slip, you may enter them in Instructions/Notes.

ORDER WINDOW—PAYMENT TAB

Order Detail

Ship To
Items
Ship Method
Payment

ADD PAYMENT
ACCOUNT
SHIPPING
CHANGE STATUS

TYPE	ACCOUNT	AMOUNT
No payments yet		

SubTotal	\$14.53	Period	Week 401
Tax	\$0.35	Order Status	Pending
Shipping	\$14.85	Order Type	Customer Service
Total	\$29.73	Order Date	2/2/2018 11:27:29 AM
Manual Replacement		Last Modified	2/2/2018 5:27:00 PM -06:00
Order Purpose		Modified By	Administrator
Manually Authorized	<input type="checkbox"/>	Created By	Administrator
Transfer Order Volume To Customer ID		Party ID	Party 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>
		Expected Payment	None

...

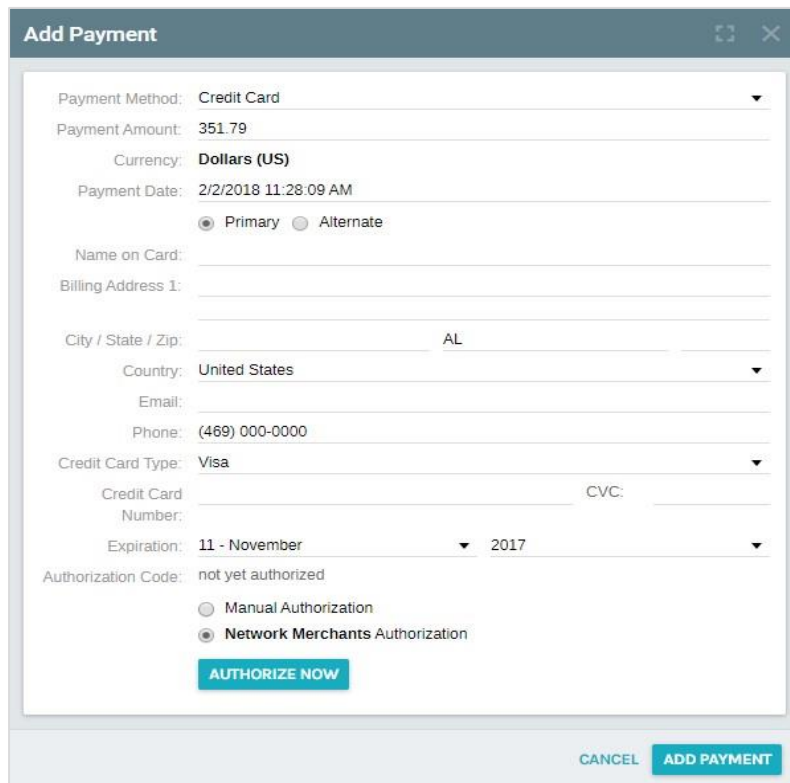
...

CANCEL
ADD ORDER

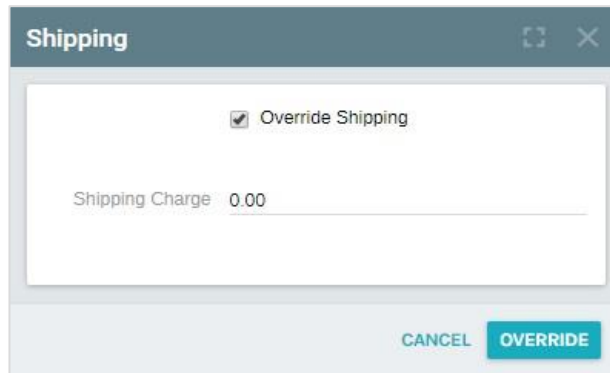
Note: You may select from multiple forms of payment.

1. Click on the Add Payment button to add payment.
2. The Add Payment window will appear.

Add Payment Window



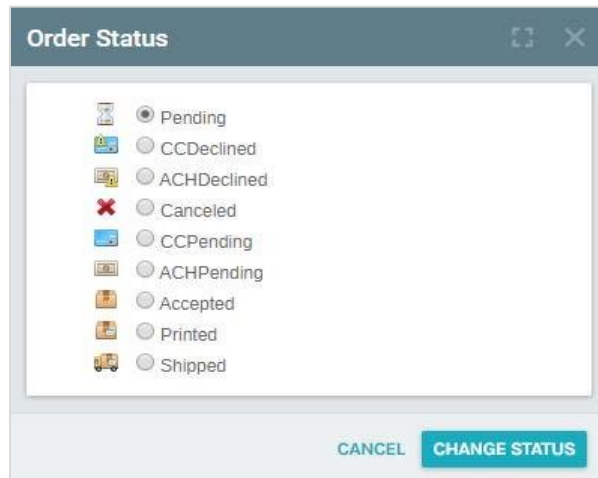
- The payment information will appear as it was entered in the Customer Details Window- Payment Info tab.
 - You may enter a manual authorization, or run an authorization through a gateway.
 - Click on the Authorize Now button to authorize payment and add the payment to the order history.
 - Click OK to close the Add Payment window and return to the Order—Payment Tab.
1. In the Order Window—Payment Tab, shown above, you may remove a payment by selecting it and clicking on the Remove button.
 2. You may edit a payment entry by selecting it and clicking on the Edit button. The Payment window shown on the previous page will appear for you to make your change.
 3. You may override the calculated shipping price by clicking on the Shipping button.



- The Override Shipping window will appear.
- The Override Shipping flag will already be activated.
- Enter the new total.
- Click OK to save the changes and return to the Order— Payment tab.

4. You may change the order status by clicking on the Change Order Status button.

CHANGE ORDER STATUS WINDOW




- The Change Order Status window will appear.
 - Select the order’s status.
 - Click OK to save the changes and return to the Order—Payment tab.
5. You may change the order date by clicking on the Browse button next to it. The Date and Time window will appear.
 6. You may exclude the invoice from being shipped (for gifts) by clicking on the Suppress Pack Slip Price flag.
 7. If you want to exclude the invoice from being printed in a batch print job, click on the Do Not Ship- invoice created manually flag.
 8. When all of the order information has been entered in the Order window, click on the Add Order button at the bottom.
 9. The Order Invoice window will appear.

Order Number 4920325 Shipped

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

Invoice Details

Gift Receipt




4920325

Ship Method: FedEx Priority (3 Business days)

To	Order Info
Test Company Tester Test Test Company 8130 John W Carpenter Fwy Dallas, TX 75247-4721	Order No.: 4920325 Customer Name: Tester Test Date: 2/2/2018 11:27:29 AM -06:00 Shipping Method: FedEx Priority (3 Business days) Created By: Administrator Fulfilled By:

Quantity	ItemID	Description	Total
1	301	Product 301	\$14.53



4920325

[CLOSE](#)

1. A formatted invoice for the saved order will appear.
2. You may access the following functions in Order Invoice window by clicking on its button.
 - **Print** – You may print the invoice.
 - **Edit Order** – You may edit the order. This will reopen the Order window and tabs.
 - **Details** – You may view a detailed report of the invoice.

Order Number 4920325 Shipped

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

Invoice Details

Gift Receipt

Order Data

CompanyID	6	Other4	0.0000	WebCarrierID3	0	TotalTaxab
OrderID	4920325	Other5	0.0000	WebCarrierID4	0	Other11
CustomerID	101780	Discount	0.0000	WebCarrierID5	0	Other12
OrderDate	2/2/2018 11:27:29 AM	DiscountPercent	0.0000	ReturnOrderID		Other13
OrderQty	1	Weight	1.0000	DeclineCount	0	Other14
OrderStatusTy	9	Notes	A previous debit has been applied to this order.		AddressIsVerified	False
PriceTy	3	FirstName	Tester	County	Dallas	Other16
Total	29.7300	LastName	Test	IsRMA	False	Other17
SubTotal	14.5300	Company	Test Company	BackOrderFromID		Other18
Shipping	14.8500	Address1	Test Company	CreditsEarned	0.0000	Other19
OrderTax	0.3500	Address2	8130 John W Carpenter Fwy	TotalFedTax	0.0000	Other20
ShippingTax	0.0000	City	Dallas	TotalStateTax	0.2688	ReturnCat
FedShippingTax	0.0000	State	TX	ManualShippingTax	0.0000	Replacem
StateShippingTax	0.0000	Zip	75247-4721	ReplacementOrderID		Calculated
CityShippingTax	0.0000	Country	US	LockedDate		HandlingF
CityLocalShippingTax	0.0000	Email		CommissionedDate		OrderProc
CountyShippingTax	0.0000	Phone	(469) 000-0000	Other6	0.0000	ActualCarr

[CLOSE](#)

Viewing Order History

You may view order history for a customer from the Customer Details page.

1. Click on Orders/Invoice in the Customer Options Menu

Note: The menu name changes depending upon the last function used. For example, if you viewed contacts last, the Contacts name would appear as the menu name.

2. The order history will appear.

Viewing and Editing an Individual Order

You may view and edit an individual order for a customer from the Customer Details page.

1. From the order history page in the previous section, click on the order you wish to view or edit
2. The Order Invoice window will appear.
3. Click on the Edit Order button in the Invoice Window.
4. Make your changes when the Order window will appear.

Printing an Invoice

You may print an invoice for an individual order for a customer from the Customer Details page.

1. From the order history page in the previous section, click on the order you wish to print.
2. The Order Invoice window will appear.
3. Click on the Print button.

View Detail Report

You may view a detail report for an individual order for a customer from the Customer Details page.

1. From the order history page in the previous section, click on the order you wish to view or edit
2. The Order Invoice window will appear.
3. Click on the Details Tab

Emailing an Invoice

You may email an invoice for an individual order for a customer from the Customer Details page.

1. From the order history page in the previous section, click on the order you wish to email.
2. The Order Invoice window will appear.
3. Click on the EMAIL button.
4. The email window will appear, enter the recipient information, and send the email.

Moving an Order

You may move an order for an individual order for a customer from the Customer Details page.

1. From the order history page in the previous section, click on the order you wish to move.
2. The Order Invoice window will appear.
3. Click on the Move Order Button
4. The Move Order screen will open.
5. Click the three dots to open the search screen.
6. Choose where the order will be moved under and click Move

View Order Change History

You may view the order change history for an individual order for a customer from the Customer Details page.

1. From the order history page in the previous section, click on the order you wish to move.
2. The Order Invoice window will appear.
3. Click on the History Button

Adding a Recurring Order

You may enter a Recurring Order for a customer from the Customer Details page.

Recurring Order Section

1. From the Customer Details page, Click on Add a New Recurring Order

RECURRING ORDER WINDOW—SHIP TO TAB

1. The Recurring Order window will appear with the Ship To tab open.
2. Enter the information in the Ship To tab as well as the other tabs to complete the order. Once the order is saved, it will appear in the Recurring Order History list.
3. Select the shipping address for the order from:
 - The customer's shipping address as entered in the Customer Details Add/Edit Customer window—Name and Address tab.
 - The customer's mailing address as entered in the Customer Details Add/Edit Customer window—Name and Address tab.
 - A new mailing address.
4. Enter the email address and phone number.

RECURRING ORDER WINDOW—ITEMS TAB

1. The Items tab will not have any items selected when it first appears.
2. The default warehouse will appear. If you need to change the warehouse, and have access to do so, click on the arrow next to warehouse to select another warehouse.

3. The customer's default currency will appear, as entered in the Customer Details—Other tab. You may change the customer currency by clicking on the arrow next to currency.
4. Click on the Add Item button to add an item to the order. The Order Item window will appear.
 - Enter the item code and click search. The product description for that code will appear.
 - You may change the product description.
 - Enter the quantity to be purchased.
 - The item price will appear when the item code is entered. You may change the price by checking the box next to Override Price.
 - The total (quantity) (item price) will automatically appear.
 - Click Add Item to close the window and add the item to the order.
5. Continue adding items to the order.
6. You may remove an unwanted item by selecting it and clicking on the Remove button.
7. You may edit an item by selecting it and clicking on the Edit button.
8. The Order Item window shown on the previous page will appear.

RECURRING ORDER WINDOW—SHIP METHOD TAB

1. Select the shipping method for the order.

Note: The shipping methods are entered in Administration.

2. Select the shipping method that will be used.
3. If you have any special handling instructions to be printed on the invoice or packing slip, you may enter them in Instructions/Notes.

RECURRING ORDER WINDOW—SCHEDULE TAB

1. The Recurring Order Schedule Tab allows you to set the frequency of the Recurring Orders.
2. Set the start date by clicking the date. Then click the start date and time in the calendar screen.

RECURRING ORDER WINDOW—PAYMENT TAB

1. The Recurring Order Payment Tab allows you to choose a selected payment method.
2. To choose the selected payment method, just click the circle next to the desired payment method.
3. The Recurring Order Payment Tab also allows you to edit customer information by clicking the Modify Customer Account button.

RECURRING ORDER—INVOICE WINDOW

A formatted invoice for the saved order will appear.

1. **Print** – You may print the invoice.
2. **Edit Recurring Order** – You may edit the order. This will reopen the Order window and tabs.

Viewing and Editing an Individual Recurring Order

You may view or edit a Recurring Order for a customer from the Customer Details page.

Recurring Order Section

1. From the Customer Details page, Double-click on the Recurring Order number (ex: 10)
2. A formatted invoice for the saved order will appear.

PRINTING A RECURRING ORDER INVOICE

You may access the following functions in the Recurring Order Invoice window by clicking on its button.

Print

1. You may print the invoice.

CREATING AN ORDER FROM A RECURRING ORDER

You may access the following functions in the Recurring Order Invoice window by clicking on its button.

Create Order

1. You may create an order by clicking the Create Order Button.
2. Click Create Order in the Confirm Screen. A new Recurring Order will be created.

DELETE RECURRING ORDER

You may access the following functions in the Recurring Order Invoice window by clicking on its button.

Delete Recurring Order

1. You may delete an order by clicking the "Red X"(Delete Recurring Order Button).
2. The system will ask again if the Recurring Order is to be deleted. You must place a check mark by clicking in the box. Click Delete recurring order to confirm
3. The Recurring Order will then be deleted.

VIEW RECURRING ORDER CHANGE HISTORY

You may access the following functions in the Recurring Order Invoice window by clicking on its button.

History

1. You may view the history of the recurring order changes by clicking the History Button.
2. This screen shows the dates and times in which changes were made to the Recurring orders.

At a Glance:

ORDERS AND INVOICES

Orders are entered for an individual customer through the Customer Details page.

The table below quickly outlines how to enter and edit different aspects of a customer’s individual order.

If you want to add, edit or delete...	Go to...
Check	New Order/Edit Order, Payment Tab
Credit Card	New Order/Edit Order, Payment Tab
Credit Card	New Order/Edit Order, Payment Tab
Delivery Instructions	New Order/Edit Order, Shipping Method Tab
Item Description	New Order/Edit Order, Items Tab, Add Item Window
Item Price	New Order/Edit Order, Items Tab, Add Item Window
Item Quantity	New Order/Edit Order, Items Tab, Add Item Window
Items	New Order/Edit Order, Items Tab, Add Item Window
Serial Number	New Order/Edit Order, Items Tab, Add Item Window
Shipping Address	New Order/Edit Order, Ship To Tab
Shipping Costs	New Order/Edit Order, Payment Tab, Override Shipping Window
Shipping Method	New Order/Edit Order, Shipping Method Tab
Tax Rate	New Order/Edit Order, Payment Tab, Override Shipping Window

If you want to...	Go to...
Accept payment for an invoice	Order History, Edit Order or Double-click Order Number
Accept payment for multiple invoices	Accounting, Accept Payment
Email a statement of transaction history	Order History, Edit Order or Double-click Order Number Accounting, Accept Payment
Email an invoice	
Fax a statement of transaction history	Accounting, View Statement
Fax an invoice	
Print a statement of transaction history	Order History, Edit Order or Double-click Order Number
Print an invoice	Accounting, View Statement
	Order History, Edit Order or Double-click Order Number
	Accounting, View Statement
	Order History, Edit Order or Double-click Order Number

Viewing Customer Contacts

You may view, enter, edit, and delete contacts for a customer through the Customer Details page.

1. At the bottom of the Customer Options menu, click Customer Contacts
2. The list of Contacts will appear.

ADDING A NEW CONTACT

1. Click Add Customer Contact in the upper right corner.
2. The New Contact window will appear with the Contact Info tab open.
3. Enter the contact information in both tabs.
4. Click Add Contact to save your changes and close the window.

Note: The departments and user-defined fields are created and edited in Administration.

EDITING A CONTACT

1. Double-click on the contact you wish to edit.
2. The Contact Info window will appear.
3. Enter your changes.
4. Click Save Changes to update contact detail.

DELETING A CONTACT

1. Click on the three dots to the far right of the contact you wish to delete.
2. Select Delete from the menu.
3. Click Delete in the popup to confirm your deletion.

Viewing Customer Documents

You may view, upload, and delete customer documents through the Customer Details page.

1. Near the bottom of the Customer Options menu, click Documents
2. Documents associated with this customer will appear in the Customer Details page.

UPLOADING A DOCUMENT

1. Click the ADD FILE button in the top navigation.
2. The Add Files window will appear.
3. Select the files you wish to add.
4. Click ADD FILES to upload the files and close the window.

DELETING A DOCUMENT

1. Click on the DELETE button in the top navigation to delete it.

Viewing Customer History

You may view customer history from the Customer Options menu.

Customer History

1. Click on Account History under the Customer Options Menu.

Customer Details Toolbar

1. From the Customer Details toolbar Click on the far right menu on the Customers Details toolbar.

Entering Inquiries

You may enter an inquiry, or an action tracking item for a customer through the Account History Screen.

1. Navigate to the Account History page described in the previous section.
2. Click on the Add Inquiry button in the upper right corner.
3. The Customer History window will appear.
4. Select the inquiry category.

Note: Inquiry categories are created in Administration.

5. Select the user that will own this inquiry. The selected user will see the inquiries in the Today page.
6. Enter a brief description for the inquiry.
7. Enter more details for the inquiry, especially if assigning to another user.
8. The status will be automatically set to open, but can be changed.

Note: Closed inquiries appear in a lighter font on the inquiry history list.

VIEWING INQUIRIES FROM CUSTOMER DETAILS

1. Click on Account History under the Customer Options Menu.

My Actions

You may view a list of your action tracking items by clicking on the My Actions button in the Home Menu.

Note: Action tracking items, also known as inquiries, are created in the Customer section, and can be edited.

DEFINING REPORT CRITERIA

1. You may select which action tracking items appear by clicking on the Report Criteria button in the My Actions toolbar.
2. The Report Criteria window will appear.
3. Enter the start and end dates for the action tracking items.
4. Select how to sort the action items: by company, assigned to, assigned from, or category.

Note: Action Tracking Item status types are created in Administration.

5. Select the status you wish to view; open, closed, or all.
6. Click Close to close the window and view the search results in the Actions page.

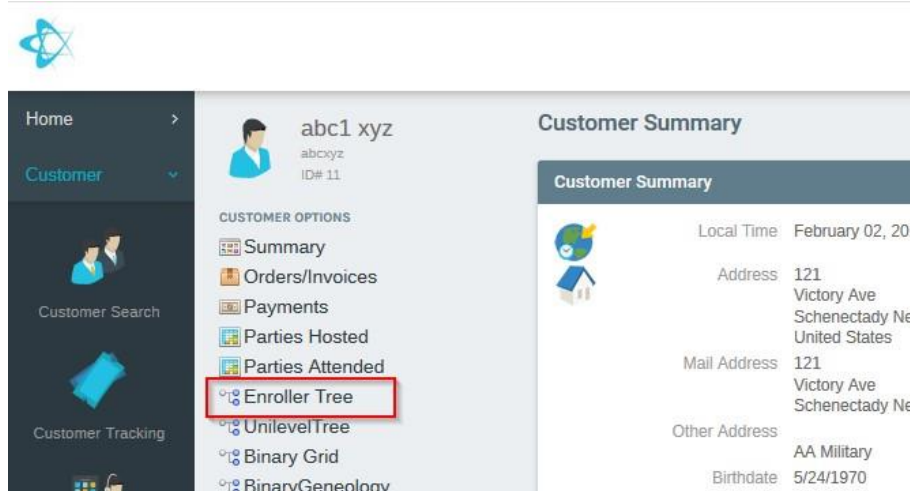
Viewing Payment History

You may view payment history by clicking on Payments under the Customer Options menu. Select the payment you wish to view for additional details

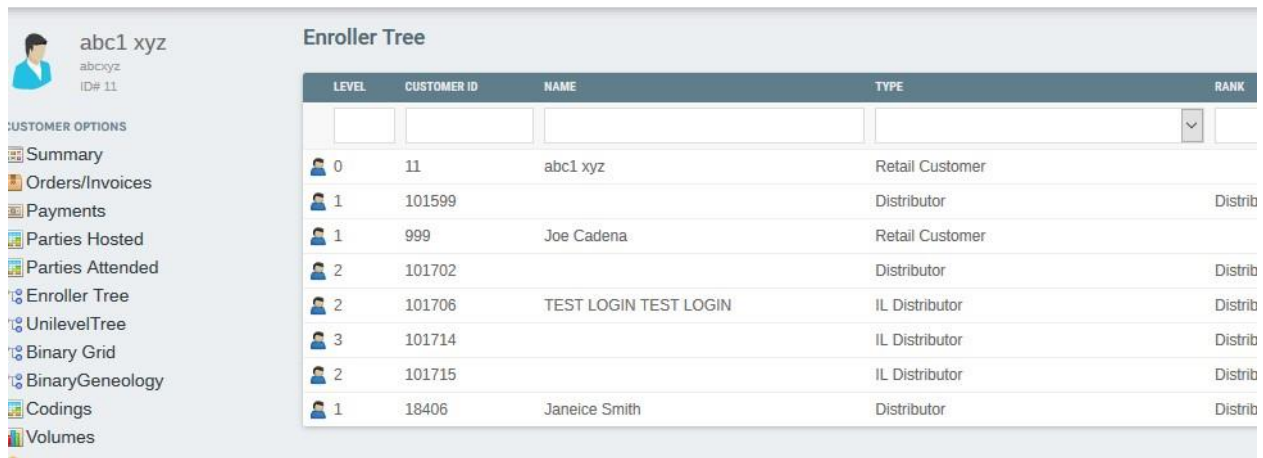
Viewing Customer Enroller Tree

You may view Customer Enroller Tree from the Customer menu.

1. From the Customer Options Menu click on Enroller Tree.



2. The Enroller Tree window will appear on the right side of the customer’s details page.



The screenshot shows the 'Enroller Tree' window for customer 'abc1 xyz' (ID# 11). The window displays a table with the following data:

LEVEL	CUSTOMER ID	NAME	TYPE	RANK
0	11	abc1 xyz	Retail Customer	
1	101599		Distributor	Distrib
1	999	Joe Cadena	Retail Customer	
2	101702		Distributor	Distrib
2	101706	TEST LOGIN TEST LOGIN	IL Distributor	Distrib
3	101714		IL Distributor	Distrib
2	101715		IL Distributor	Distrib
1	18406	Janeice Smith	Distributor	Distrib

NAVIGATION UP THE TREE

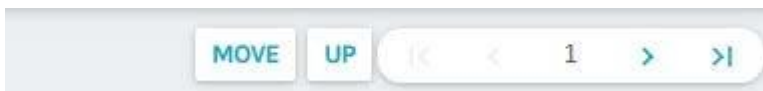
You may navigate a customer Up the Enroller Tree from the Customer Details Toolbar menu.

1. Click on the customer ID number of the customer who will navigate up the Enroller Tree.
2. Click the Up Button
3. The Enroller Tree window will appear on the right side of the page with the navigation up the tree.

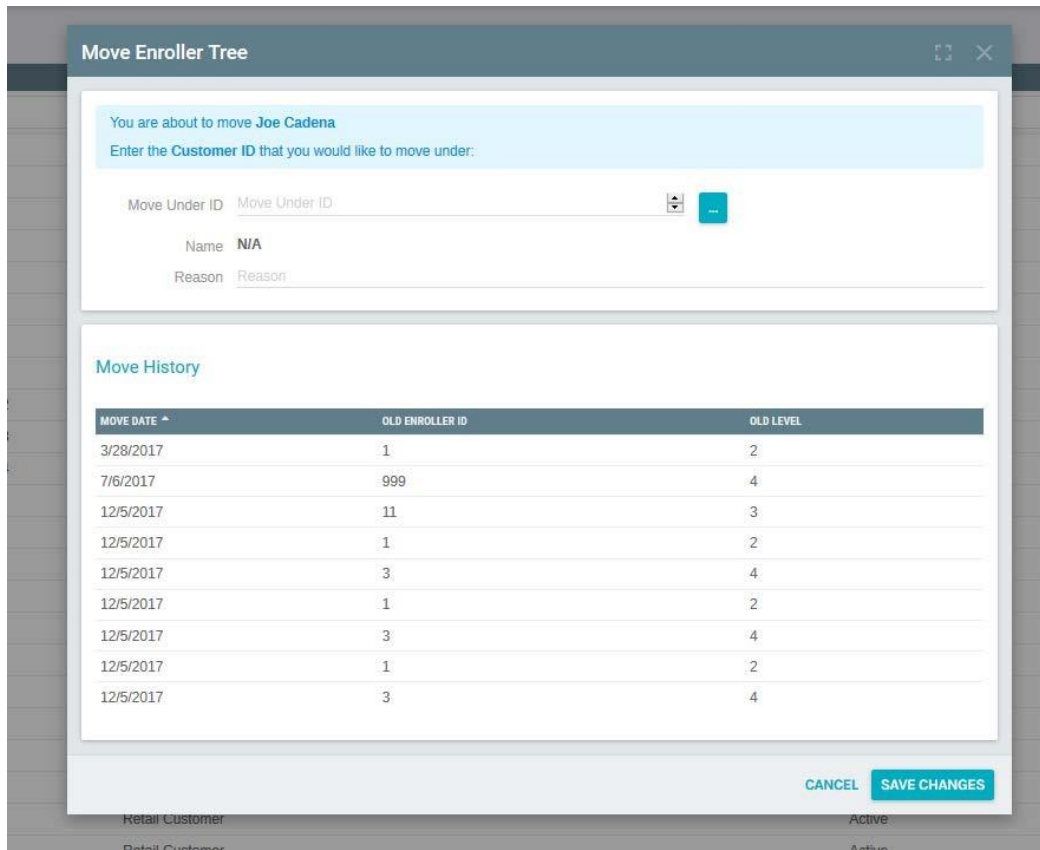
PERFORMING A TREE MOVE


You may perform a tree move from the Customer Details Toolbar menu.

1. Click on the customer ID number of the customer who will be moving in the Enroller Tree.
2. Click the Move Button



- The Enroller Placement Move window will open.



- In this screen you must enter the customer ID number of the customer you wish to move under.
- You can Browse by clicking  Next to the move under box.
- Enter the reason for the move then click OK
- The Enroller Tree window will appear on the right side of the page with the move.

NAVIGATE THROUGH THE TREE

You may navigate through the tree in two different ways.

- The first way to navigate through the tree is to click on the Next on the top or bottom of the Enroller Tree.



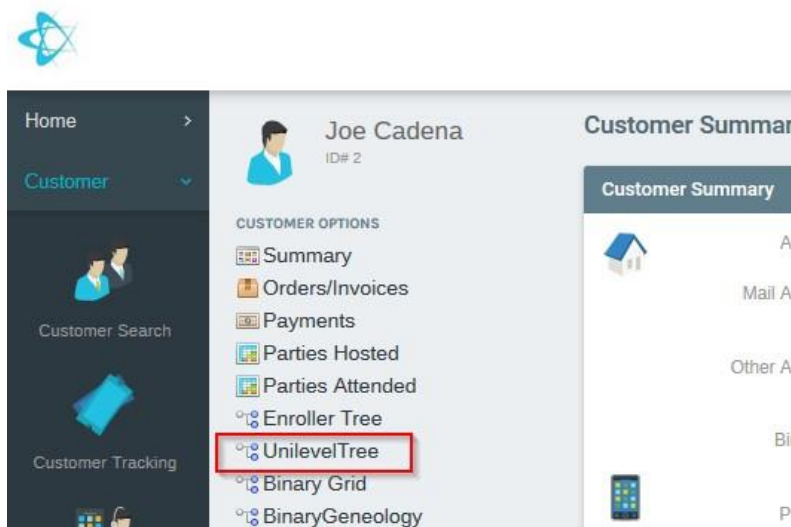
- The Second way to navigate through the tree is to click on the customer ID number.

STATUS	START DATE	
Active	12/4/2013	JUMP TO CUSTOMER
Active	12/0/2013	JUMP TO CUSTOMER

Viewing Customer Unilevel Tree

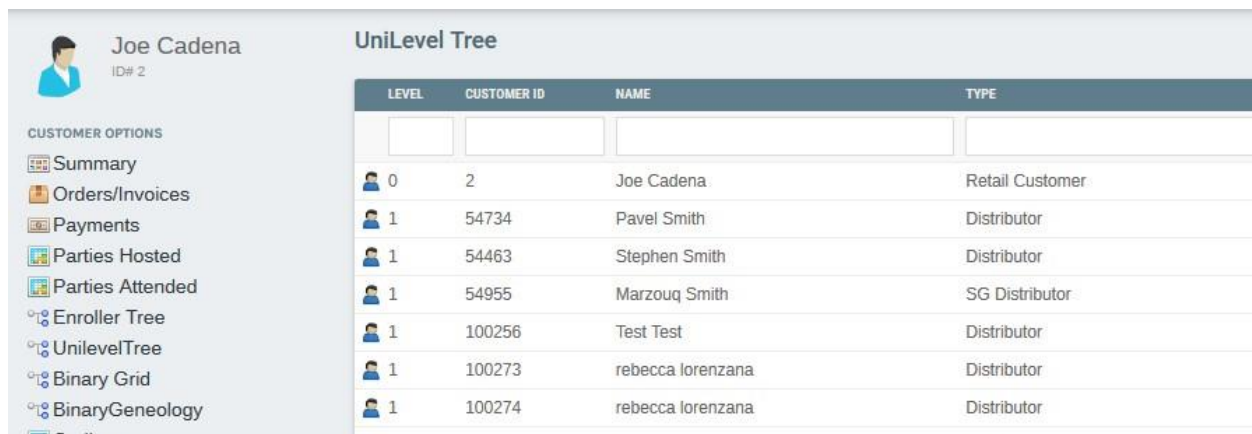
You may view Customer Unilevel Tree from the Customer menu.

- From the Customer Options Menu click on Unilevel Tree.



The screenshot shows the Exigo interface for a customer named Joe Cadena (ID# 2). On the left, a dark sidebar contains a 'Customer' menu with options like 'Customer Search' and 'Customer Tracking'. In the center, a 'CUSTOMER OPTIONS' menu lists various actions: Summary, Orders/Invoices, Payments, Parties Hosted, Parties Attended, Enroller Tree, **UnilevelTree** (highlighted with a red box), Binary Grid, and BinaryGenealogy. On the right, a 'Customer Summary' panel is partially visible, showing a list of items with icons and labels like 'A', 'Mail A', 'Other A', 'Bi', and 'P'.

- The Unilevel Tree window will appear on the right side of the customer's details page.



The screenshot shows the 'Unilevel Tree' window for Joe Cadena (ID# 2). The window displays a table with the following data:

LEVEL	CUSTOMER ID	NAME	TYPE
0	2	Joe Cadena	Retail Customer
1	54734	Pavel Smith	Distributor
1	54463	Stephen Smith	Distributor
1	54955	Marzouq Smith	SG Distributor
1	100256	Test Test	Distributor
1	100273	rebecca lorenzana	Distributor
1	100274	rebecca lorenzana	Distributor

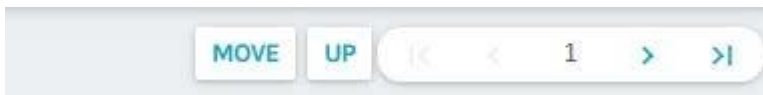
NAVIGATION UP THE TREE

1. Click on the customer ID number of the customer who will navigate up the Unilevel Tree.
2. Click the Up Button
3. The Unilevel Tree window will appear on the right side of the page with the navigation up the tree.

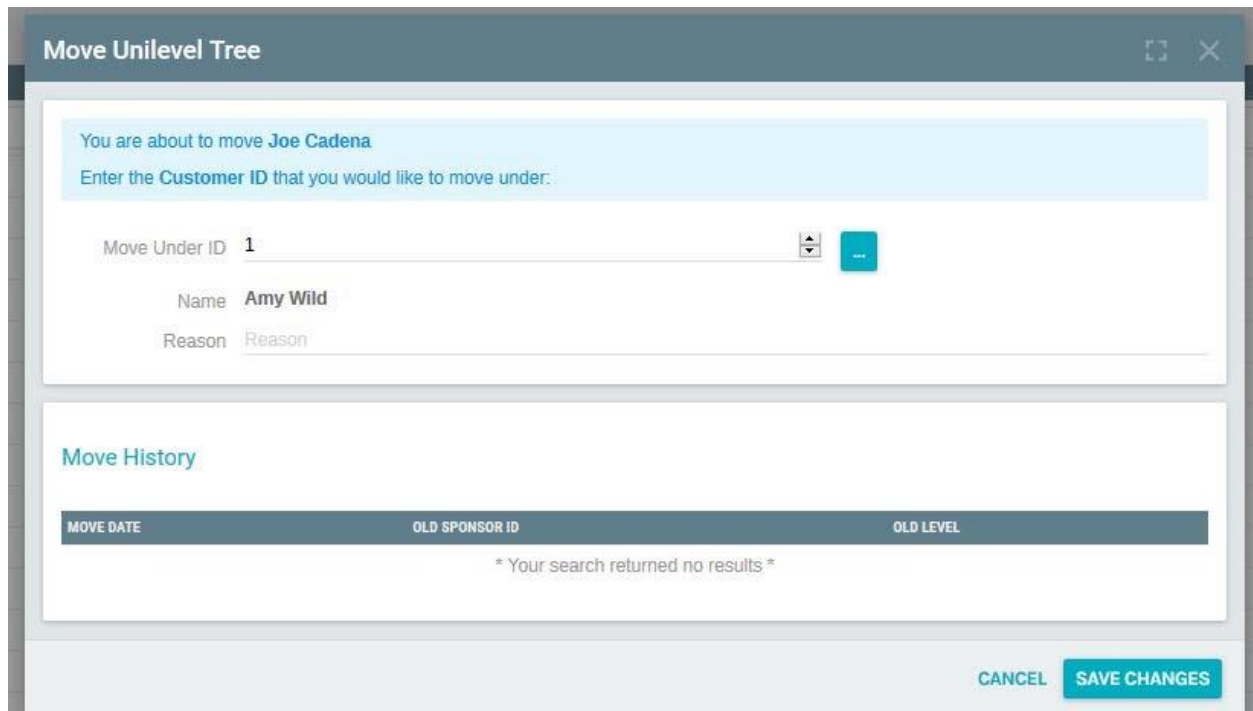
PERFORMING A TREE MOVE


You may perform a tree move from the Customer Details Toolbar menu.

1. Click on the customer ID number of the customer who will be moving.
2. Click on the Move button.



3. The Unilevel Placement Move window will open up.



4. In this screen you must enter the customer ID number of the customer you wish to move.
5. You can Browse by clicking  Next to the move under box.
6. Enter the reason for the move, click OK
7. The Unilevel Tree window will appear on the right side of the page with the move.

NAVIGATE THROUGH THE TREE

You may navigate through the tree in two different ways.

1. The first way to navigate through the tree is to click on the Next on the top or bottom of the Unilevel Tree.



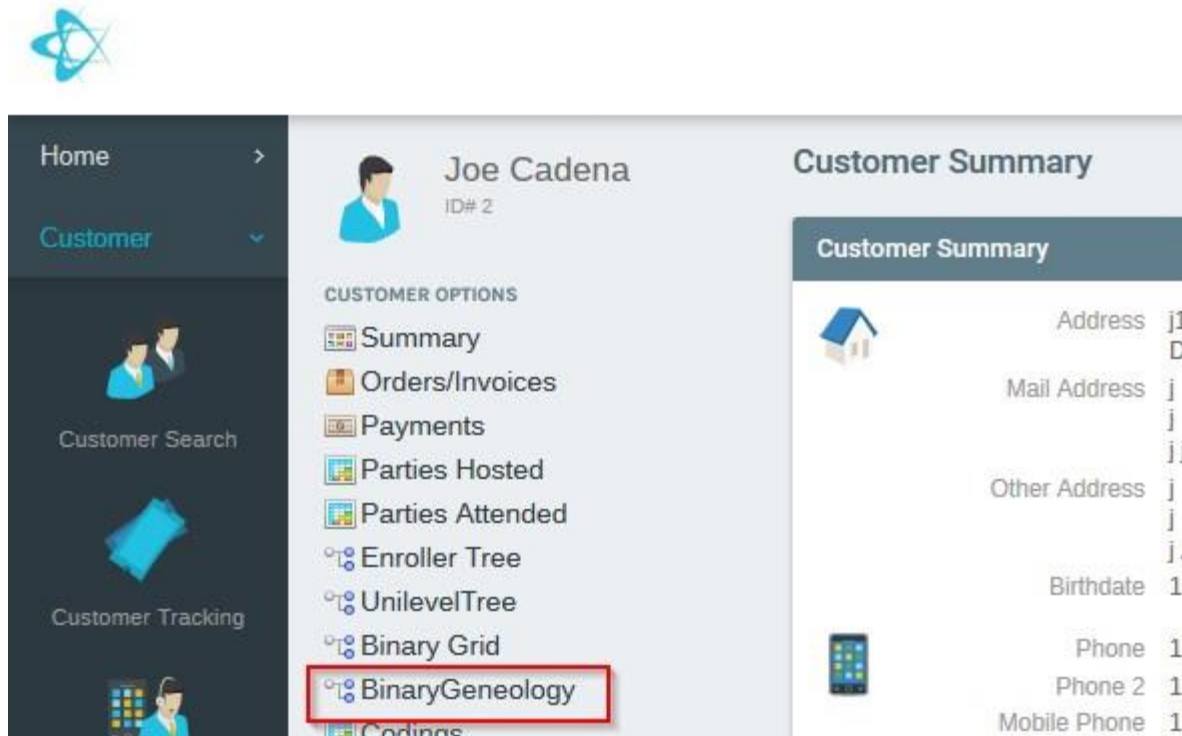
2. The Second way to navigate through the tree is to click on the customer ID number.



Viewing Customer Binary Tree

You may view Customer Binary Tree from the Customer menu.

1. From the Customer Options Menu click on Binary Genealogy.



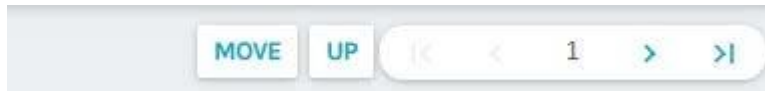
2. The Binary Tree window will appear on the right side of the customer's details page.

NAVIGATION UP THE TREE

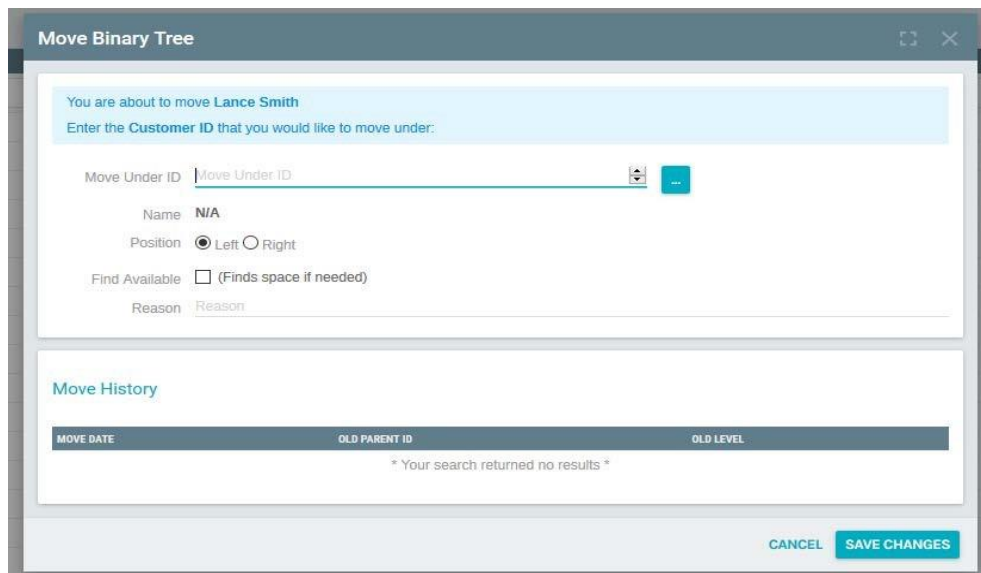
1. You may navigate a customer Up the Binary Tree from the Customer Details Toolbar menu.
2. Highlight the name of the customer who will navigate up the Binary Tree.
3. Click on the Up button.
4. The Binary Tree window will appear on the right side of the page with the navigation up the tree.


PERFORMING A TREE MOVE

1. You may perform a tree move from the Customer Details Toolbar menu.
2. Highlight the name of the customer who will move in the Binary Tree.
3. Click on the Move button.



4. The Binary Move window will open up.



5. In this screen you must enter the customer ID number of the customer you wish to move.
6. You can Browse by clicking  Next to the move under box.
7. Click in circle next to desired position, left or right.
8. Enter the reason for the move, click OK
9. The Binary Tree window will appear on the right side of the page with the move.

NAVIGATE THROUGH THE TREE

Expand or Collapse Tree

To navigate in the Binary Tree you can expand or collapse the tree by clicking on the Face icons in the Binary Tree.

Viewing Customer Binary Grid

You may view Customer Binary Grid from the Customer menu.

1. From the Customer Options Menu click on Binary Grid.
2. The Binary Grid window will appear on the right side of the customer's details page.

NAVIGATION UP THE TREE

You may navigate a customer Up the Binary Grid from the Customer Details Toolbar menu.

1. Click on the Grid Box of the customer who will become the top of the Binary Grid.
2. Click on the Up button to see which customer is up from the chosen customer in the Binary Grid.
3. The Binary Grid window will appear on the right side of the page with the navigation up the tree.

PERFORMING A TREE MOVE

1. You may perform a tree move from the Customer Details Toolbar menu.
2. Then click on the Grid Box of the customer who will be moving.
3. Click on the Move button.
4. The Binary Move window will open up.
5. In this screen you must enter the customer ID number of the customer you wish to move under.
6. You can Browse by clicking Next to the move under box.
7. Click in circle next to desired position, left or right.
8. Enter the reason for the move, click OK
9. The Binary Grid window will appear on the right side of the page with the move.

NAVIGATE THROUGH THE TREE

1. **Click on Customer ID Number**
2. To navigate in the Binary Grid, you can navigate the tree by clicking on the Customer ID Number in the Grid Box.
3. **Click on Customer Name**
4. To navigate in the Binary Grid, you can also navigate the tree by clicking on the Customers name in the Grid Box.

Report Builder

You may use the report builder to create custom reports using different report fields, filters, sort orders, and options.

Important: All orders and actions are date and time stamped. All days end and begin at Midnight (00:00), to include the current day in a report you must use the next calendar date as your report end date!

Report Builder Documentation

CREATE NEW REPORT

1. Click on the Reports button under the Accounting Menu on the left menu of the page.
2. Click on Build a Report in the upper right corner of the page.
3. Click on Create a New Report in the My Report section of the page.
4. The Report Designer screen will open to the Query tab.
5. Name the Report that is going to be created on the top of this page.
6. This is where the reports are created. You can enter the desired Report Fields, Filter, and Sort Order to build a custom Report. See the following sections for additional details

REPORT FIELDS

Adding a Report Field

1. To Add a field to your report, click on the Add Field button.
2. The Add Field screen will open.
3. Check the box next to the desired field, then click add field Button or double the desired field.
4. To see additional fields, click ">" next to the parent folder.
5. The added fields will show up in the Report Designer screen.

Removing a Report Field

1. To Remove a field from your report, click the three dots to the right of the desired field, then click on Delete.
2. The Field will be removed from the Report Designer screens and will no longer be part of the report.

Editing a Report Field

1. To Edit a field in your report, click the three dots to the right of the desired field, then click on Edit.
2. The Report Field Setup screen will open and displays the following options:
 - Field Title
 - Optional Format
 - Allows Text Wraps
 - Subgroup Headers
3. Make edits to the Edit Field Properties screen and press OK.

Moving a Report Field Up

1. To move a Report Field Up in the report, click the "^" to the right of the desired field.
2. The Field will be moved up one space in the Report Designer screen.

Note: The order of Report fields in the Report Designer screen is the same order they will appear in the report.

Moving a Report Field Down

1. To move a Report Field Down in the report, click the “v” to the right of the desired field.
2. The Field will be moved down one space in the Report Designer screen.

Note: The order of Report fields in the Report Designer screen is the same order they will appear in the report.

REPORT FILTERS

Adding a Report Filter

1. To Add a filter to your report, click on the Add Filter button.
2. Click the arrow to scroll to the desired Field
3. Click the arrow to scroll to the desired Filter condition.
4. Enter a default value if needed.
5. Click OK
6. The added fields will show up in the Report Designer screen.

Removing a Report Filter

1. To Remove a filter from your report, click the three dots to the right of the desired filter, then click on Delete.
2. The filter will be removed from the Report Designer screens and will no longer be part of the report.

Editing a Report Filter

1. To Edit a filter in your report, click the three dots to the right of the desired filter, then click on Edit.
2. The Report Field Setup screen will open and allows you to edit values configured for this filter.
3. Click Save Changes when complete.
4. The Edited filter will show up in the Filter Section of the Report Designer screen.

Moving a Report Filter Up

1. To move a Filter Up in the report, click the “^” to the right of the desired filter.
2. The filter will be moved up one space in the Report Designer screen.

Note: The order of Report filter in the Report Designer screen is the same order they will appear in the report.

Moving a Report Filter Down

1. To move a Filter down in the report, click the “v” to the right of the desired filter.
2. The filter will be moved down one space in the Report Designer screen.

Note: The order of Report filters in the Report Designer screen is the same order they will appear in the report.

REPORT SORT ORDER

Adding a Report Sort Order

1. To Add a sort order to your report, click on the Add Sort Order button.
2. The Sort Field Setup screen will open.
3. Click the arrow to scroll to the desired Sort by Field.
4. Click the arrow to scroll to the desired Sort.
5. Click Add Field
6. The added Report Sort Order will show up in the Report Designer screen.

Removing a Report Sort Order

1. To Remove a Sort Order from your report, click the three dots to the right of the desired Sort Order, then click on Delete.
2. The Sort Order will be removed from the Report Designer screens and will no longer be part of the report.

Editing a Report Sort Order

1. The Edit Sort Order screen allows you to edit the Sort information in a report.
2. To Edit a sort order in your report, click the three dots to the right of the desired sort order, then click on Edit.
3. The Sort Field Setup screen will open and allows you to edit values configured for this Sort Order.
4. Click Save Changes when complete.
5. The Edited Report Sort Order will show up in the Report Designer screen.

Moving a Report Sort Order Up

1. To move a Sort Order Up in the report, click the “^” to the right of the desired Sort Order.
2. The Sort Order will be moved up one space in the Report Designer screen.

Note: The order of Report Sort Order in the Report Designer screen is the same order they will appear in the report.

Moving a Report Sort Order Down

1. To move a Sort Order down in the report, click the “v” to the right of the desired Sort Order.
2. The Sort Order will be moved down one space in the Report Designer screen.

Note: The order of Report Sort Order in the Report Designer screen is the same order they will appear in the report.

REPORT OPTIONS TAB

In the Report Designer Screen, the Report can be refined under the Options Tab.

The Options Tab allows you to:

- Display Details in a variety of Rows and/or Columns.
- Return a maximum number of rows
- Group Fields as Headers
- Display Record Count on Sub Groups.

SHARING A REPORT

In the Report Designer Screen, the Report can be shared under the Sharing Tab.

1. Click Add User
2. Select the User(s) to share this report with by placing a check mark next to their User.
3. Click Add User

CREATING THE FINISHED REPORT

- When all sections are completed with the desired Report fields, Filters, Order Sorts, and Options on the Report Designer Screen Click SAVE and the Report will be generated.

Important: All orders and actions are date and time stamped. All days end and begin at Midnight (00:00), to include the current day in a report you must use the next calendar date as your report end date!

COPY EXISTING REPORT

You can Copy an existing report under a different Report Name and Edit it to build a new report.

1. Click on the Reports button under the Accounting Menu on the left menu of the page.
2. Click on Build a Report in the upper right-hand corner of the Accounting Reports page.
3. Click on Report that is to be copied in the My Report section of the Company Reports page.
4. The Report will be generated, and the Report Screen will open.
5. To Copy the Report, click on the Copy Report Button at the bottom of the window.
6. The Report Designer Screen will open with the words "Copy of (and the Report name)" in the report name section of the screen.
7. Edits can be made from the Report Designer Screen or an exact Copy can be made and saved.
8. Click on Save and a New Copy of an existing report or a new Edited Report will be Generated.

IMPORT REPORTS, SHARED, AND TEMPLATES

You can Import an existing report, shared reports, and templates into the Report Designer Screen to Edit or build on an existing report.

-
1. Click on the Reports button under the Accounting Menu on the left menu of the page.
 2. Click on Build a Report in the upper right-hand corner of the Accounting Reports page.
 3. Click on Create a New Report in the My Report section of the Company Reports page.
 4. The Report Designer screen will open to the Query section.
 5. Name the Report that is going to be imported.
 6. Click the Import Button at the bottom of this window.
 7. A list of reports you can use to import from will display.
 8. Click Import next to the report you would like to use.
 9. The reports, shared reports, or templates will be imported into the Report Designer Screen.
 10. Click Save and the report will be generated.

EXPORTING DATA FROM A REPORT

You can export data report to an Excel file.

1. Click on the Reports button under the Accounting Menu on the left menu of the page.
2. Click on Build a Report in the upper right-hand corner of the Accounting Reports page.
3. Click on Report that is to be Exported in the My Report section of the Company Reports page.
4. The screen will open the generated report.
5. The Report can be exported by clicking the Export to Excel Button at the bottom of the window.

REMOVING A REPORT

You can remove a report from the system.

1. Click on the Reports button under the Accounting Menu on the left menu of the page.
2. Click on Build a Report in the upper right-hand corner of the Accounting Reports page.
3. Click on the Report that is to be Removed.
4. The screen will open to the generated report.
5. Clicking the Edit Button at the bottom of this window.
6. The Report Designer screen will open to the Query section.
7. To Delete the Report, click the Trash Can icon at the bottom of the window.
8. Click Delete in the pop-up window.
9. The Report will be removed from the system.