



# **Order Management: Creating a New Order**

v 1.0

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## Order Management

Proper Order Management in Exigo is critical for accurate processing and reporting throughout the system – including Commissions. This training module will focus on the following:

1. What is an Order
2. How to Create a New Order

**NOTE: This is Level 1 training and will cover the basics for Order Management. Levels 2 and above will cover additional details on Orders.**

## What is an Order

In Exigo, an Order is defined as a purchase of an Item or Items by a Customer. The Order may originate from multiple sources including Exigo.com, a Distributor's Back Office (Web), or a Distributor's Replicated Site (Web). More information will be reviewed about the Web in future training modules.

Exigo has two primary types of orders: Standard Order and Recurring Order. This training module will focus solely on the Standard Order.

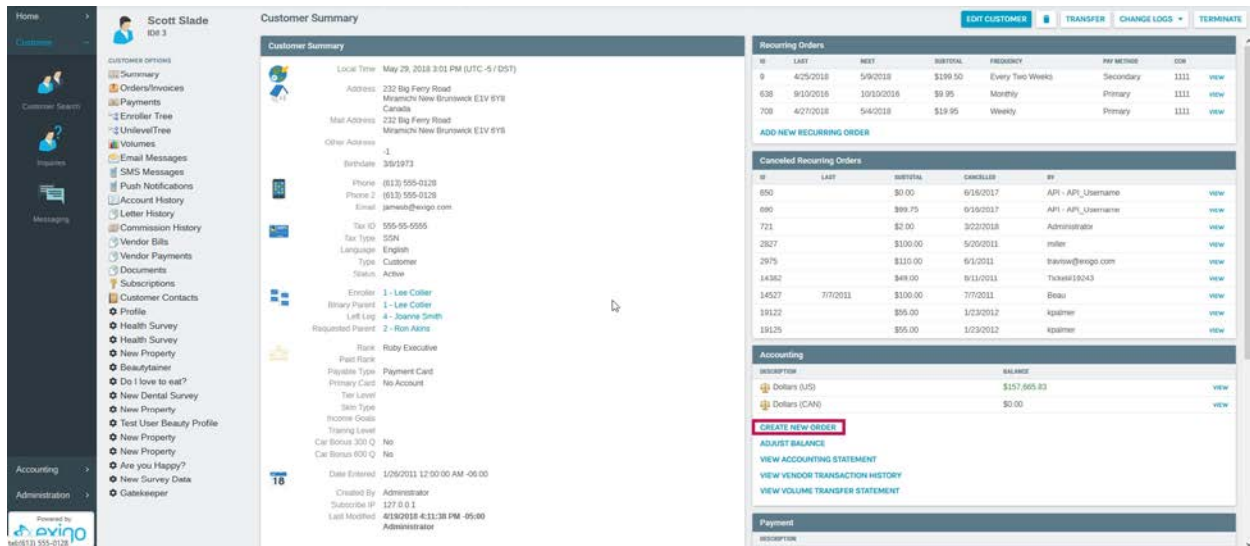
A Standard Order is a onetime purchase of an Item or Items. Exigo assigns a unique OrderID to each Order.

### **THE KEY COMPONENTS OF AN ORDER INCLUDE THE FOLLOWING:**

1. **Customer Information** – Who is buying the product.
2. **Order Information** – Includes high level Order fields such as: Order ID, Order Date, Order Type, Order Status, Sub-Total, Shipping, Taxation, Total, Currency, Warehouse, Volumes associated with the Order, etc. These fields will be reviewed in the Viewing Order Information training module.
3. **Order Detail** – Includes specifics on the Items within the Order such as: Item Code, Description, Quantity, Item Price, Volume, etc. These fields will be reviewed in the Viewing Order Information training module.
4. **Payment Information** – Includes Payment Type, Status of Payment, etc. Payments will be covered in a future training module.

## How to Create a New Order

To create a New Order, Log in to Exigo.com and locate the Customer placing the Order. In order to do this, you will navigate to Customer > Customer Search > Double Click on your Customer. This will open the following screen:



**Customer Summary**

**Customer Summary**

Lock Time: May 29, 2018 3:01 PM (UTC -5 / DST)

Address: 232 Big Ferry Road  
Miramichi New Brunswick E1V 8Y8  
Canada

Mail Address: 232 Big Ferry Road  
Miramichi New Brunswick E1V 8Y8

Other Address: -1

Birthdate: 3/6/1973

Phone: (813) 555-0128  
Phone 2: (813) 555-0128  
Email: jamead@exigo.com

Tax ID: 995-95-9595

Tax Type: 5504  
Language: English  
Type: Customer  
Status: Active

Enroller: 1 - Lee Collier  
Binary Parent: 1 - Lee Collier  
Link Log: 4 - Joanne Smith  
Requested Parent: 2 - Ron Atkins

Rank: Ruby Executive  
Paid Rank:

Payable Type: Payment Card  
Primary Card: No Account  
Tier Level:

Skin Type:  
Income Goals:  
Training Level:

Car Bonus 200 Q: No  
Car Bonus 600 Q: No

Date Entered: 1/29/2011 12:00:00 AM -05:00  
Created By: Administrator  
Subcode IP: 127.0.0.1  
Last Modified: 4/18/2018 4:11:38 PM -05:00  
Administrator

**Recurring Orders**

ID	LAST	NEXT	SUBTOTAL	FREQUENCY	PP METHOD	LINK
9	4/29/2018	5/9/2018	\$190.50	Every Two Weeks	Secondary	1111 view
638	9/10/2018	10/10/2018	\$9.95	Monthly	Primary	1111 view
708	4/27/2018	5/4/2018	\$19.95	Weekly	Primary	1111 view

**Accounting**

DESCRIPTION	BALANCE
Dollars (US)	\$157,665.83
Dollars (CAN)	\$0.00

**CREATE NEW ORDER**

ADJUST BALANCE  
VIEW ACCOUNTING STATEMENT  
VIEW VENDOR TRANSACTION HISTORY  
VIEW VOLUME TRANSFER STATEMENT

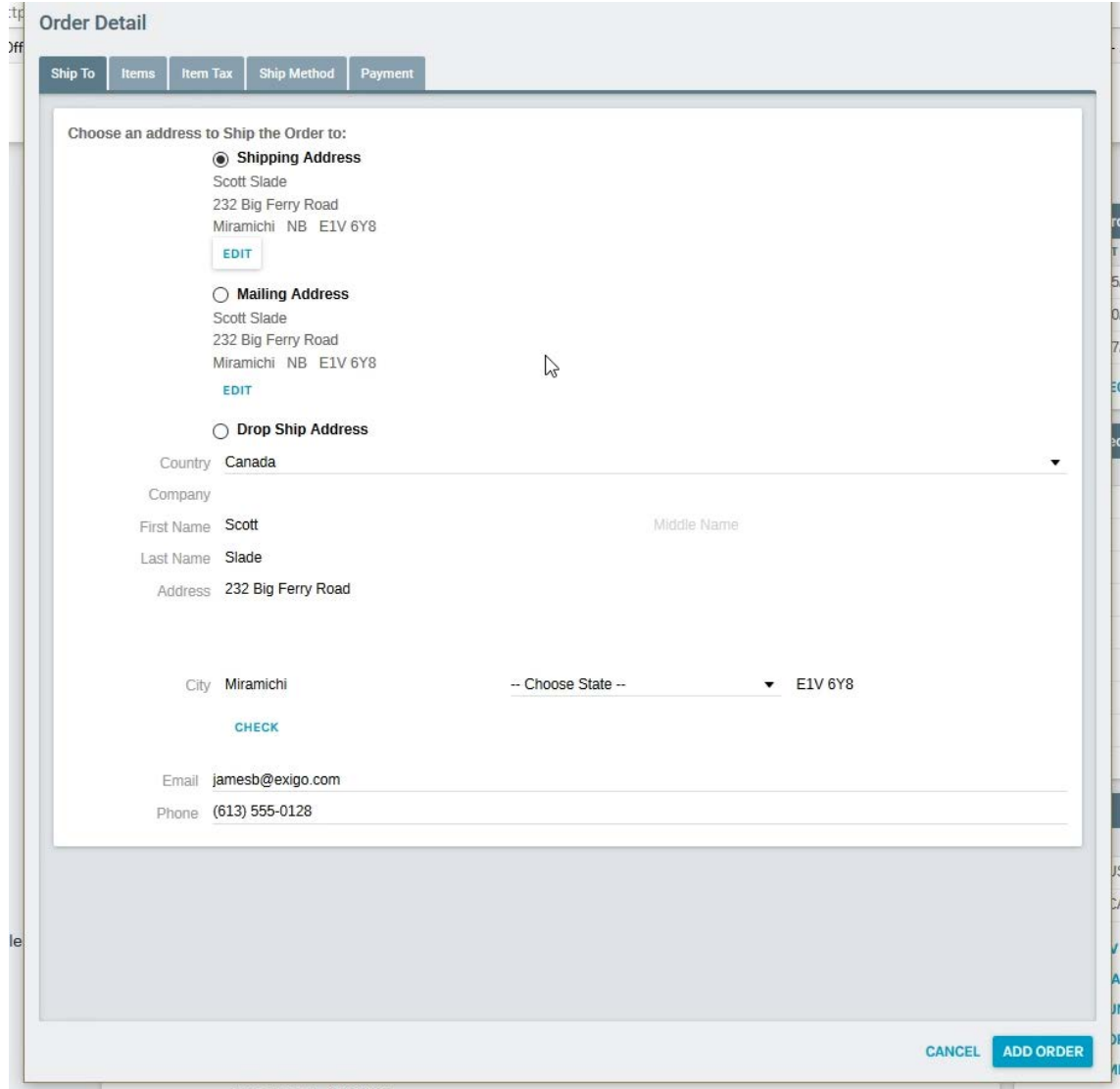
**Payment**

DESCRIPTION

Clicking on "Create New Order" will open the window shown on the next page.

## CREATING A NEW ORDER – SHIP TO TAB

The Ship To Tab is the first step in creating a new order. The fields are outlined below.



**Order Detail**

Ship To | Items | Item Tax | Ship Method | Payment

Choose an address to Ship the Order to:

- Shipping Address**  
 Scott Slade  
 232 Big Ferry Road  
 Miramichi NB E1V 6Y8  
 EDIT
- Mailing Address**  
 Scott Slade  
 232 Big Ferry Road  
 Miramichi NB E1V 6Y8  
 EDIT
- Drop Ship Address**

Country: Canada

Company: \_\_\_\_\_

First Name: Scott Middle Name: \_\_\_\_\_

Last Name: Slade

Address: 232 Big Ferry Road

City: Miramichi -- Choose State -- E1V 6Y8

CHECK

Email: jamesb@exigo.com

Phone: (613) 555-0128

CANCEL ADD ORDER

The Customer is given three options for Ship To Address:

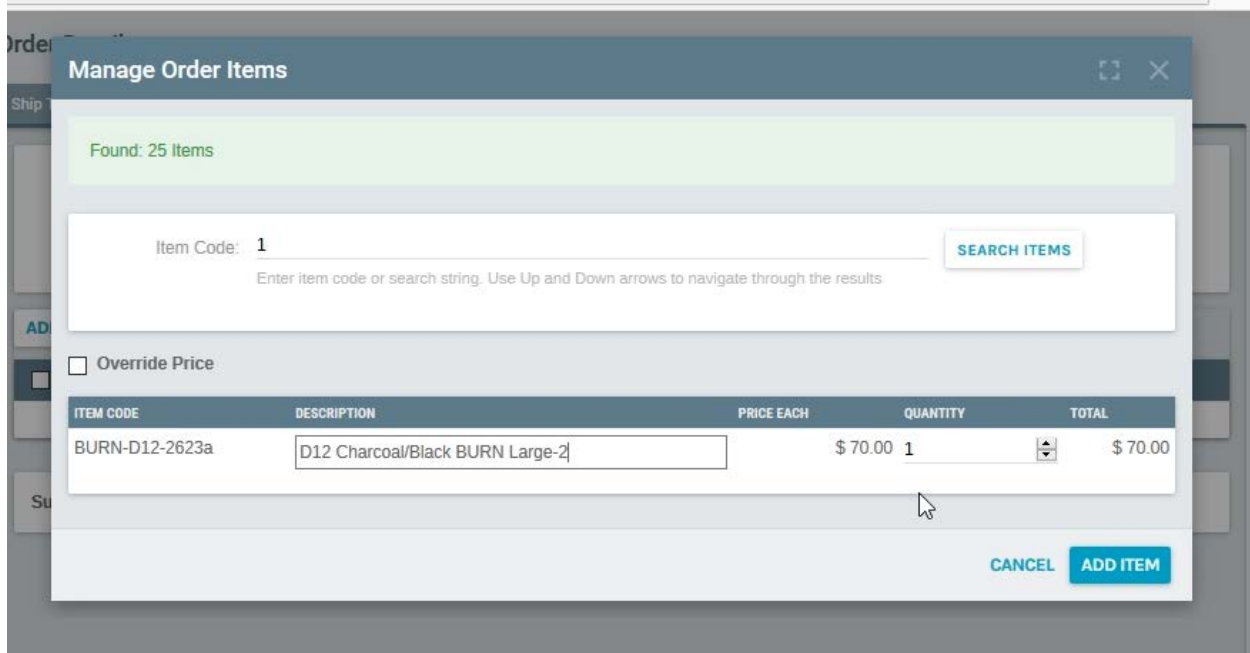
1. **Shipping Address** – This is the Main Address stored on the Customer Record.
2. **Mailing Address** – This is the Mailing Address stored on the Customer Record. This address is not required so may not be populated here.
3. **Drop Ship Address** – This gives the Customer the ability to have an Order shipped to an Address of his/her choosing. However, the ability to Order and Ship To other Countries is defined by the Client's business rules. If a Client is doing business only in the US, the Customer would not have the ability to enter an address outside of the US.

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4. **Email** – This is the email address found on the Customer Record. This field is not required so may not be populated here. This field is open for entry if the email address needs to be changed.
  5. **Phone** – This is the Main Phone Number listed on the Customer Record. This field is not required so may not be populated here. This field is open for entry if the Phone number needs to be changed.

Clicking “Next” will display the window shown on the next page.

## CREATING A NEW ITEM - ITEMS TAB

The Items Tab is the next step in the Order Process. The fields are outlined below the image.



There are three standard fields at the top of this tab:

1. **Location** – This is the Warehouse listed on the Customer Record. This may be changed by clicking on the Change Warehouse button. Warning: Changing Warehouses may change Item Availability. The Warehouse should never be changed after adding Items.
2. **Currency** – This is the Currency on the Customer Record and the Warehouse Record. This may be changed by clicking on the Change Currency button. Warning: Currency should never be changed after adding Items. Business rules may also prevent the change of Currency.
3. **Price Type** – This is the Type of Price tied to the Customer Type. Depending on business rules, Distributors usually receive Wholesale Pricing while Retail Customers usually receive Retail Pricing. Warning: Price Type should not be changed after adding Items.

Click the “Add” button to begin adding items to the Order. Clicking “Add” will open the Add Product window shown above. The fields for this section are reviewed below.

1. **Item Code** – Enter the Item Code to be added to the Order. If the Item Code is not known, the starting number or letter may be entered to display a list of items starting with this value. From this list you must double click to add to the Order.
2. **Description** – This field will automatically populate based on the Item Code entered. This is the commonly known as the Name of the Item.
3. **Quantity** – A quantity of the Item must be entered in the field in order to add the Item to the Order. Adding the Quantity will populate the Total field.

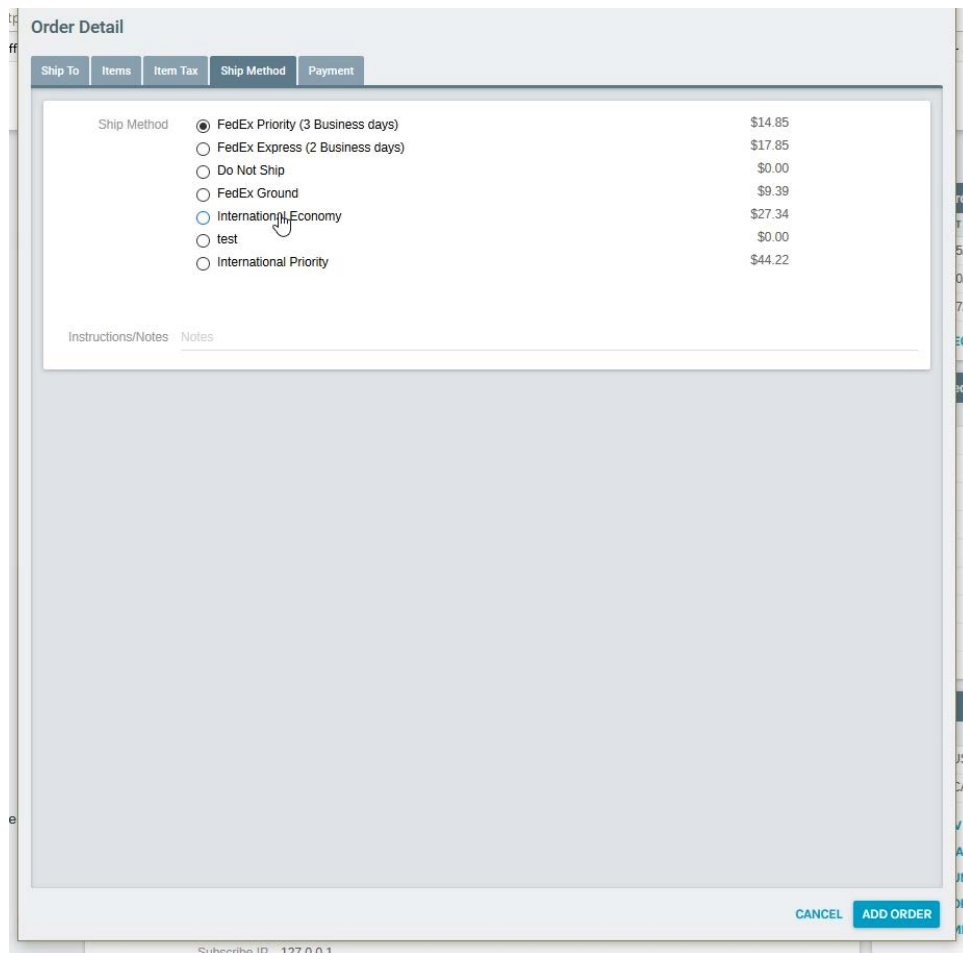
4. **Price Each** – This is the Price shown on the Item Record for this Customer’s Price Type. This Price may be overridden using the Edit button. Warning: Use caution when Editing values as this may affect Commissions and other Client specific processes.
5. **Total** – This field displays the currency total for the Item being added. This field will populate automatically with entry into the Quantity field.

Click the **“Add”** button again to add Items to the Order.

Click **“OK”**, then **“Next”** to proceed with the Order Process. Clicking **“Next”** will open the window on the following page.

### CREATING A NEW ORDER – SHIP METHOD TAB

The Ship Method Tab is the next step in the Order Process. The fields are outlined below the image.



**Order Detail**

Ship To | Items | Item Tax | **Ship Method** | Payment

Ship Method	Price
<input checked="" type="radio"/> FedEx Priority (3 Business days)	\$14.85
<input type="radio"/> FedEx Express (2 Business days)	\$17.85
<input type="radio"/> Do Not Ship	\$0.00
<input type="radio"/> FedEx Ground	\$9.39
<input type="radio"/> International Economy	\$27.34
<input type="radio"/> test	\$0.00
<input type="radio"/> International Priority	\$44.22

Instructions/Notes: \_\_\_\_\_  
Notes: \_\_\_\_\_

CANCEL ADD ORDER

Subscribe IP: 127.0.0.1



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**Available Ship Methods:** This section shows all available Ship Methods based on business rules. The Shipping Method choice should be selected via Radio Buttons.

**Pickup Name:** This field allows input of a Name of the Customer who will pick up the item if Will Call is available and selected.

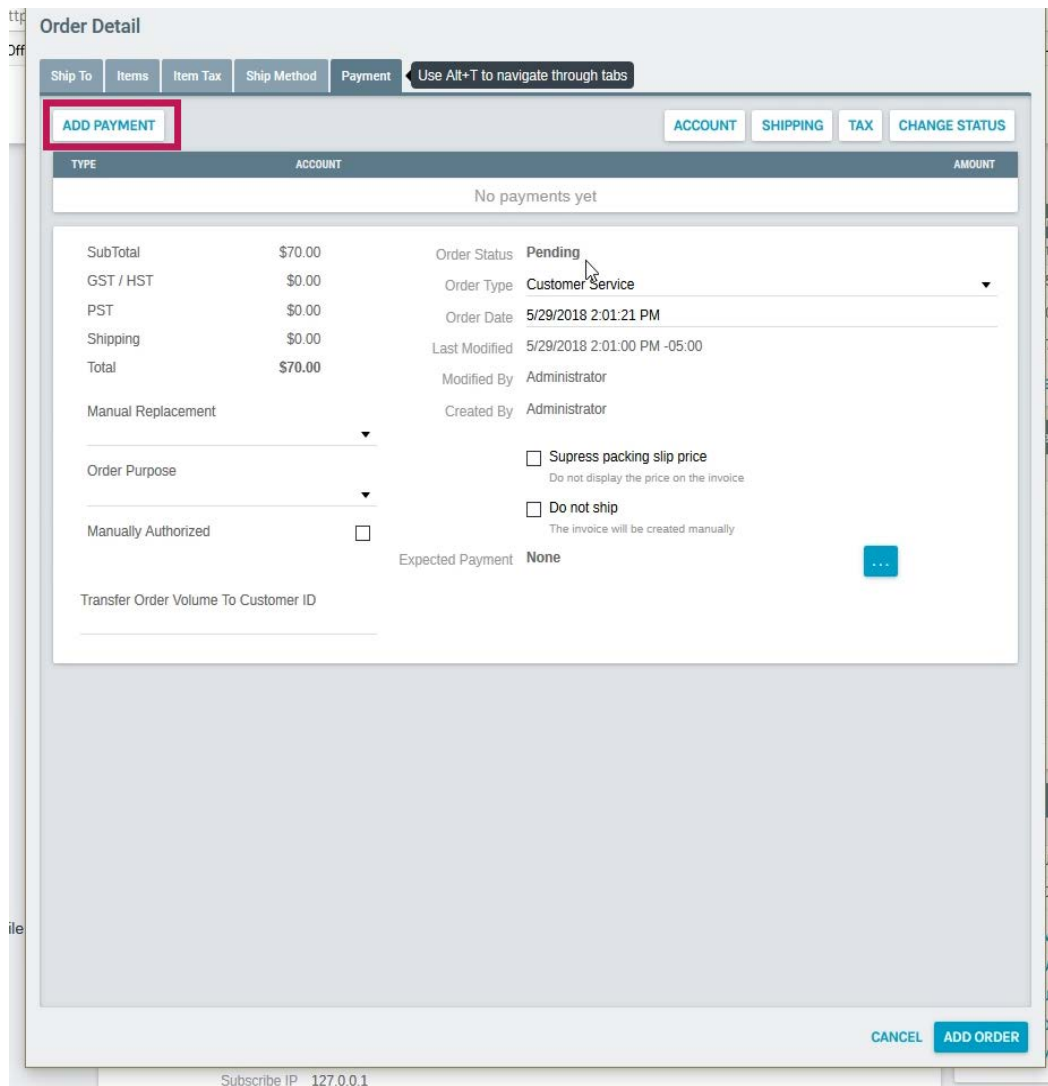
**Instructions/Notes:** This field allows the Customer to enter any necessary notes/instructions for the warehouse.

Click **"Next"** to proceed to the next screen shown on the next page.

### **CREATING A NEW PAYMENT – PAYMENT TAB**

The Payment Tab is the next step in the Order Process. The fields are outlined below the image.

NOTE: The Order Status before a Payment is added is "Pending".



Order Detail

Ship To Items Item Tax Ship Method Payment Use Alt+T to navigate through tabs

ADD PAYMENT ACCOUNT SHIPPING TAX CHANGE STATUS

TYPE	ACCOUNT	AMOUNT
No payments yet		

SubTotal \$70.00  
GST / HST \$0.00  
PST \$0.00  
Shipping \$0.00  
Total \$70.00

Order Status Pending  
Order Type Customer Service  
Order Date 5/29/2018 2:01:21 PM  
Last Modified 5/29/2018 2:01:00 PM -05:00  
Modified By Administrator  
Created By Administrator

Manual Replacement  
Order Purpose  
Manually Authorized

Supress packing slip price  
Do not display the price on the invoice

Do not ship  
The invoice will be created manually

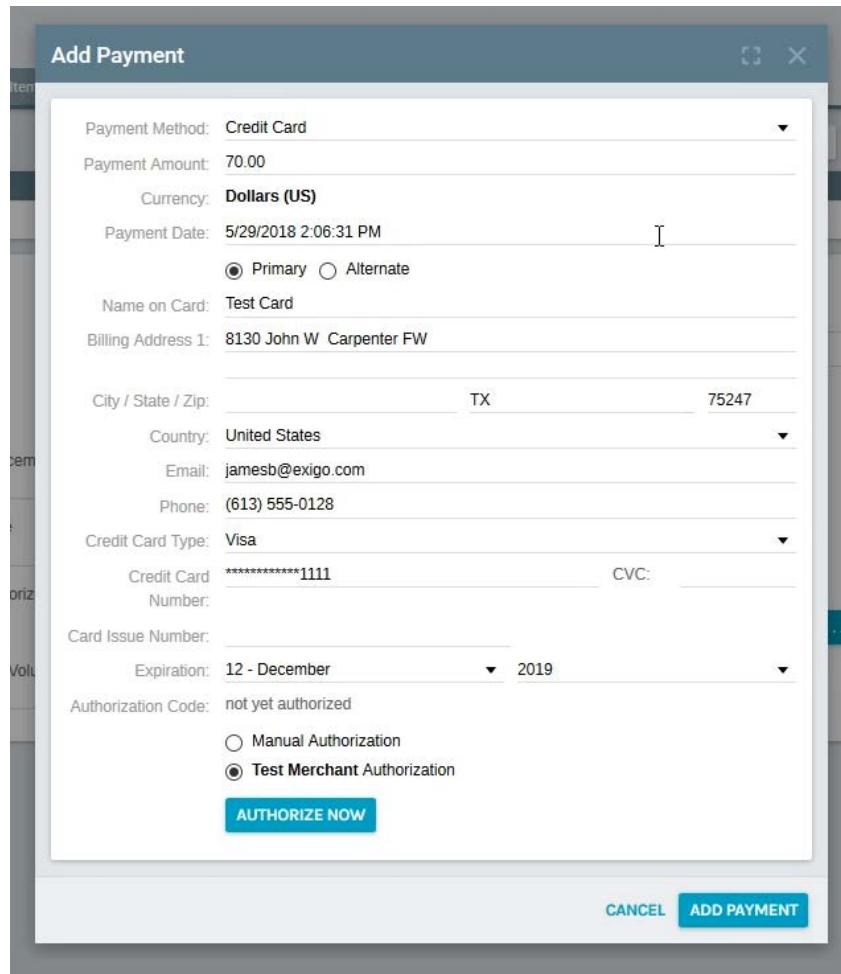
Expected Payment None

Transfer Order Volume To Customer ID

CANCEL ADD ORDER

Subscribe IP 127.0.0.1

For purposes of this training module, we will focus only on Adding a Payment to complete the Order. In order to do so, click on the **"Add"** button. Doing so will open the following window.



Allowable Payment Methods are Client specific based on Client rules. The individual fields are reviewed below.

**Payment Method:** Payment Method defaults to Credit Card. However, depending on business rules other options may be available. This module will maintain the Credit Card path.

**Payment Amount:** The Payment Amount will default to the amount owed on the Order. This may be changed, but doing so may create a positive or negative balance on the account.

**Currency:** This field is pulled from the Items Tab and may not be changed on this page.

**Payment Date:** This field defaults to the current Date and Time. This may be changed if needed.

**Primary/Alternate Card:** If Primary or Alternate Credit Cards are on file, the Radio Buttons will pull in the information by choosing the appropriate Card. If Cards are not on file, the Credit Card information will need to be entered.

**Name on Card:** This field is the Customer's Name as it appears on the Card.

**Billing Address:** This is the Customer's Billing Address associated with the Card.

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**City/State/Zip:** These fields are associated with the Billing Address on the Card.

**Country:** This is the Country associated with the Billing Address on the Card.

**Email:** This is the Email Address associated with the Card.

**Phone:** This is the Main Phone Number associated with the Card.

**Credit Card Type:** Values for this field may be chosen from the drop down list. Values in this field are commonly Visa, MasterCard, Amex, etc.

**Credit Card Number:** This