



Order Management: Processing Replacement Orders

v 1.0

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Processing Replacement Orders

This training module will focus specifically on processing Replacement Orders within Exigo. Replacement Orders are typically only processed via Exigo Admin (Exigo.com). A few things to understand about Replacement Orders:

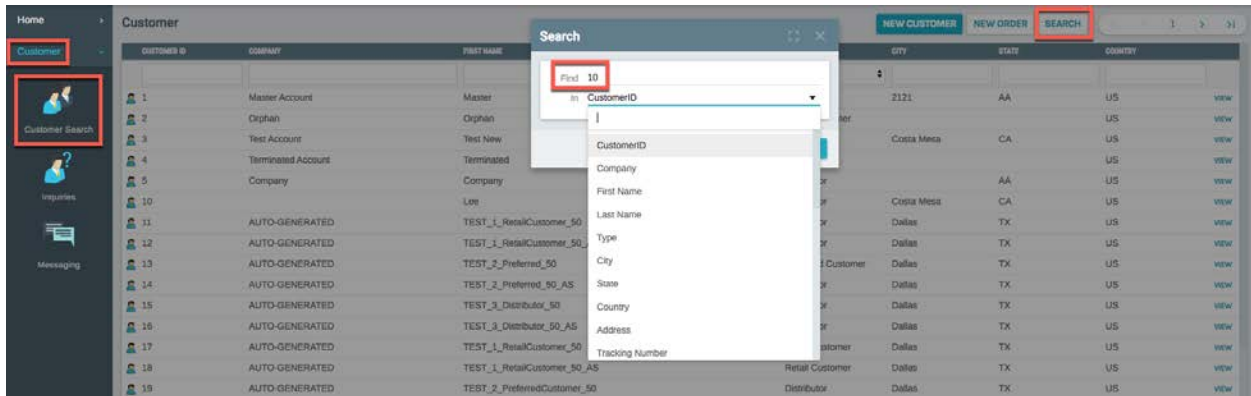
1. A Replacement Order in Exigo is a New Order with a New Order ID. The Replacement ID is tied to the Original Order ID in the Database for reporting purposes.
2. A Replacement will never show on the Original Order ID.

HOW TO PROCESS A REPLACEMENT

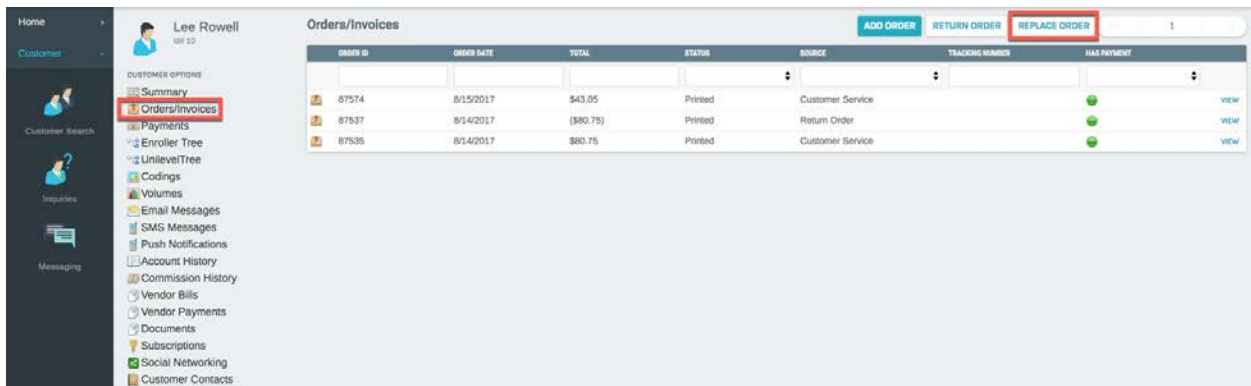
To process a replacement, locate the Order in Exigo. This may be done via the following process:

Click on Customer > Customer Search > Search

Enter the Customer ID in the 'Find' field.




After locating the Customer Record, click on "Orders/Invoices". This will display a list of all Orders for this Customer.



Clicking on “Replace Order” will display the following window. Enter the Order to be replaced and click on “Search”.

Pick Order

Search by Order ID

| ORDER ID | NAME | TOTAL | ORDER DATE | |
|-----------------------------------------------------------------------------------------|-------------|-------|------------|-------------------------------------------|
|  87574 | Rowell, Lee | 43.05 | 8/15/2017 | <input type="button" value="PICK ORDER"/> |

If the correct Order ID is found, click on “Pick Order”. This will open up the following window to process a Replacement. The window will populate with all information from the Original Order.

Ensure all Tabs (Ship To, Items, Ship Method, and Payment) are complete prior to clicking on “Add Order”.

Order Detail

Ship To Items Ship Method Payment

Choose an address to Ship the Order to:

Shipping Address
Lee Rowell
130 McCormick Ave
Costa Mesa CA 92626-3316
[EDIT](#) [CHECK](#) Verified

Mailing Address
Lee Rowell
5427 W Flight Ave
Santa Ana CA 92704-1815
[EDIT](#) [CHECK](#)

Drop Ship Address

Country United States

Company

First Name Lee

Last Name Rowell

Address 130 McCormick Ave

City Costa Mesa California 92626-3316
[CHECK](#) Verified

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

Choose the appropriate Ship To Address and Click on the Items Tab to move forward.

Clicking on the Items Tab will display the following window:

Order Detail ✖

Ship To
Items
Ship Method
Payment

Warehouse **Main NMI** ▼

Currency **Dollars (US)** ▼

Price Type **Wholesale** ▼

ADD ITEM
REMOVE ALL ITEMS

| QTY | ITEM CODE | DESCRIPTION | PV | CV | RETAIL COMMISSION | PREFERRED COMMISSION | PACK LEVEL 1 | PACK LEVEL 2 | PACK LEVEL 3 | PRICE EACH | TOTAL |
|-----|------------|-------------|--------|--------|-------------------|----------------------|--------------|--------------|--------------|------------|--------|
| 1 | 10-S009-01 | Digestive | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

SubTotal: **\$0.00**

PV: \$0.00

CV: \$0.00

Replacement Order 87574

ID:

CANCEL
ADD ORDER

Ensure that all information is correct. This is a free Replacement Order. All amounts should equal zero.

To proceed click on the Ship Method Tab.

The following window will be displayed:

Order Detail

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

| | | |
|-------------|-----------------------------------------------|--------|
| Ship Method | <input type="radio"/> Will Call | \$0.00 |
| | <input checked="" type="radio"/> FedEx Ground | \$0.00 |
| | <input type="radio"/> FedEx Overnight | \$0.00 |
| | <input type="radio"/> Ground 3-5 Days | \$0.00 |

Instructions/Notes

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

Choose the correct Ship Method and move forward by clicking on the Payment Tab.

Clicking on the Payment Tab will display the following window:

Order Detail

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

ACCOUNT SHIPPING TAX CHANGE STATUS

| TYPE | ACCOUNT | AMOUNT |
|-----------------|---------|--------|
| No payments yet | | |

| | | | |
|--------------------------------------|--------|------------------------------------------------------|-----------------------------------------|
| SubTotal | \$0.00 | Order Status | Accepted |
| Tax | \$0.00 | Order Type | Replacement Order |
| Manual Shipping | \$0.00 | Order Date | 8/15/2017 11:14:51 AM |
| Total | \$0.00 | Last Modified | 8/15/2017 11:15:00 AM -05:00 |
| FreeCreditItem | | Modified By | leer |
| | | Created By | leer |
| ExactorCalculate Date | | <input type="checkbox"/> Suppress packing slip price | Do not display the price on the invoice |
| Transfer Order Volume To Customer ID | | <input type="checkbox"/> Do not ship | The invoice will be created manually |

CANCEL ADD ORDER

Click on "Add Order" to complete the Replacement Process. The following window will be displayed showing the Replacement Order Invoice.

Order Number 87576 Accepted
⊞ ⊗

EDIT ORDER
RMA
CHANGE STATUS ▾
COMMISSIONS
HISTORY

Invoice

Details

Invoice 1 ▾

| | |
|--------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lee Rowell 130 McCormick Ave Costa Mesa, CA 92626-3316 | Order Type: Replacement Order Shipping Method: FedEx Ground Customer ID: 10 Customer Name: Lee Rowell Sales Tax ID: Date: 8/15/2017 11:14:51 AM -05:00 Email: leer@exigo.com Phone: 4698654984 Created By: leer Fulfilled By: |
|--------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Payment Info

| Quantity | ItemID | Description | Price | Total |
|----------|------------|-------------|---------------------|---------------|
| 1 | 10-S009-01 | Digestive | \$0.00 | \$0.00 |
| | | | Subtotal: | \$0.00 |
| | | | Shipping: | \$0.00 |
| | | | Taxes: | \$0.00 |
| | | | Total: | \$0.00 |
| | | | Amount Paid: | \$0.00 |

CLOSE

As a final verification step, go back to the Customer Record and click on Orders/Invoices to ensure a Replacement Order displays.

Home

Customer

Customer Search

Inquiries

Lee Rowell

(99 10)

CUSTOMER OPTIONS

- Summary
- Orders/Invoices
- Payments
- Enroller Tree
- Unilevel Tree
- Codings
- Volumes
- Email Messages
- SMS Messages

Orders/Invoices
ADD ORDER
RETURN ORDER
REPLACE ORDER
1

| ORDER ID | ORDER DATE | TOTAL | STATUS | SOURCE | TRACKING NUMBER | HAS PAYMENT | |
|----------|------------|-----------|----------|-------------------|-----------------|-------------|------|
| 87576 | 8/15/2017 | \$0.00 | Accepted | Replacement Order | | | VIEW |
| 87574 | 8/15/2017 | \$43.05 | Printed | Customer Service | | | VIEW |
| 87537 | 8/14/2017 | (\$80.75) | Printed | Return Order | | | VIEW |
| 87535 | 8/14/2017 | \$80.75 | Printed | Customer Service | | | VIEW |

The Replacement Order Process is now complete.