



Order Status and Type Definitions

v 2.0

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What are the Order Status Types in Exigo

The order status types for CCPending, ACHPending, CCDeclined and ACHDeclined are used to manage the monthly autoship batch charging and the recurring billing for any website subscriptions. Please refer to the RecurringOrder FAQ document for how these statuses are used. Here is a brief description of the other order statuses:

INCOMPLETE - status you can set with the API only for test orders. You cannot change an order to this status in the admin interface.

PENDING - order is entered in system and waiting for payment. All orders manually entered in the system start as Pending and once a payment is applied, it goes to Accepted status. The Pending status is also used for exception handling if you need to hold an order and do not want it released for commissions or fulfillment.

CANCELLED - don't ship or commission the order. We do not delete order records from the database, so this is the status you would use instead.

ACCEPTED - order is paid for or the order is released for fulfillment and commissioning. Order goes to Accepted status with the addition of a payment to the order or by a status override in the customer service admin screen. Once this status is achieved, the commission program will push the volume and calculate any commissions or rank advancement with the order data. The order is also considered as fulfill-able as most warehouses will pull Accepted or Printed orders.

PRINTED - pack slip has been printed in the warehouse for pick/pack/ship, no changes to order should occur. Order goes to Printed status when the warehouse or fulfillment house batch prints invoices or packing slips from Exigo Admin by going to Accounting>>Invoices and clicks on the Batch link to the right of the Accepted basket. The order status can be changed using the status override in customer service admin. Once an order goes to printed status using the batch print method, it gets assigned a batchid number and stored on the order. If you attempt to change the status to Accepted to try to print again, it will not batch process because it already has a batchid. You would need to go to the reprint batch section of the invoice screen to reprint it. Printing an individual order from the admin interface does not change the status to Printed.

SHIPPED - order is shipped, stock on hand count is decremented. Order goes to Shipped status when a tracking number is added to the order from the DBSync application, the API or the admin interface. When you go to Accounting>>Invoices and click on the Printed basket of orders, you will see a button at the top of the pop up report that allows you to manually enter a tracking number for an order. This will then change the status of the order to Shipped.

PENDING INVENTORY - this status is deprecated and no longer used.

For commission purposes, only those orders with Accepted, Printed or Shipped status are considered for volume and commissioning.

Order Types/Order Source

If a commission plan has different qualification rules based on retail sales volume or autoship volume, then the order type tells the commission program how to treat the volume. If an order type is Recurring Order or Web Recurring order, then the volume would collect as autoship volume. All other order types are treated as standard volume. A company could have the qualification requirement that you need 150 Personal Volume to qualify (including retail sales of personally enrolled customers) or 100 Autoship Personal Volume. Anytime there is a requirement for Autoship volume, then the order types become important. Return Order type tells the commission program to process an automatic clawback (if commission paid out is tied to the order). Replacement Order is ignored by the commission program altogether. Here is a brief description of the order source types:

CUSTOMER SERVICE - This is used any time an order is created from the Exigo Admin interface using the New Order screen.

SHOPPING CART - This is used only for legacy content engine websites that use the packaged Shopping Cart. This feature is being deprecated and only grandfathered clients will use this.

WEB WIZARD - This type is being deprecated and should not be used.

RECURRING ORDER - This is used when any order is generated from the Recurring Order template by the ARO Process.

Import - Used when historical order data is imported into the database.

BACK ORDER - This type is being deprecated and should not be used.

REPLACEMENT ORDER - This type is used when the Replacement Order feature in Exigo Admin customer screen is used.

RETURN ORDER - This type is used when the Return Order feature in Exigo Admin customer screen is used.

WEB RECURRING ORDER - This type is only used by the API web services if the Order Source Type is specified.

TICKET SYSTEM - This source is for Exigo use only and should not be used by any client.

API ORDER - This is the default order source type if the order is created from the API web service and the order source type is not specified or missing.

BACK ORDER PARENT NOSHIP - This type is being deprecated and should not be used.

CHILD ORDER - Used by custom procedures where a secondary order is generated from the primary order for purposes of fulfilling multiple products on one order from more than one warehouse.

Any of these order source types can be used when creating an order using the API web services. It is recommended that you not use any types that are scheduled for deprecation.