

Editing Recurring Orders

v 1.1



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Canceling Recurring Orders

This training module focuses on cancelling recurring orders. Let us briefly describe what is a Recurring Order or as it is also known: Auto Orders or Auto Ships. These Orders are set up one time via a template and automatically kick off at a specified Frequency. A key set up in Exigo is the definition of this Frequency. The most common Frequency is Monthly, but Exigo supports a variety of other Frequencies. It is mostly asked to any client to have at least one recurrent order to enroll or be part of a new rank group.

For several clients it is mandatory that a customer must have at least one recurring order with certain minimum requirements, to keep an active status. Please be aware of this situation before cancelling your only active autoorder. If you want to remove or add new items to your recurring order, there is the option to simply edit the Auto Order instead of cancelling and creating a new one.

How to Search for a Recurring Order to Cancel it

First, we need to log in to Exigo.com and navigate to Customer > Customer Search.

This will display the following screen.

Home >	Customer					NEW CUSTOMER	NEW ORDER	SEARCH		1	> >I
Customer ~	COMPANY	COMPANYKEY	CUSTOMER ID	CUSTOMER TYPE	CUSTOMER STATUS	COUNTRY	CITY	STATE	LAST NAME	FIRST NAME	
				~		~					
25	Sector Se	109	1	Enterprise 1 (fka Enterprise)	Maintenance Active	US	Dallas	ТХ	Thompson	David	VIEW
	StroWeb Inc		2	Other	Closed Account	US	Coventry	RI	Romano	Bob	VIEW
Customer Search	T3 Networks		4	Other	Closed Account	US	Dallas	ТХ	Phillips	Troy	VIEW
	RBC Life Sciences	107	3000	Express	Closed Account	US	Irving	ТХ	Goad	Leanne	VIEW
	Software Medium		3005	Other	Closed Account	US	Dallas	ТХ	Carroll	Bill	VIEW
Customer Tracking	LaMarca Unlimited, LLC DBA BP Technologies	199	3006	Express	Closed Account	US	Carlsbad	CA	Gomez	Yadira	VIEW
	CCC Interactive		3008	Other	Closed Account	US	Houston	ТХ	Johnson	CJ	VIEW
	Senegence International		3009	Other	Closed Account	US	Newport Beach	CA	Rogers	Joni	VIEW
	Evel Rewards		3012	Other	Closed Account	US	Addison	ТХ	Demartino	Kevyn	VIEW
	R Picasso PEO		3013	Other	Closed Account	US	Stevensville	MD	Ludwig	Lena	VIEW

In the Customer Search window, type the name or customer id of the customer you wish to cancel the recurring order. If you click on the username, the client summary will be displayed as shown in the below screen:

Home >		Customer	Summary			NEW	CUSTOMER E	EDIT CUSTOM	R	TRANSFER	CHANGE LOGS	T 1	ERMINATE
Customer ~	ID# 15	Customer S	ummary			Recu	rring Orders	1					
Cuistomer Search	CUSTOMER OPTIONS Summary Orders/Invoices Payments	*	Local Time Address	January 22, 2021 1	10:42 PM (UTC -6)	10 7 440	LAST 12/27/2020	EXT 7/15/2021 727/2021	SUBTOTAL \$49.99 \$168.00	FREQUENCY Yearly Monthly	PAY METHOD Primary Primary	CCN 9910 9910	VIEW
Anquiries	Reprise Hosted Reprise Attended Conception for the second Conception for the second for the second Codings		Mail Address Other Address Birthdate Phone Mobile Phone			ADD Note	NEW RECURRING	ORDER	tributer #0. C				
Messaging	Volumes Email Messages SMS Messages Push Notifications		Email Tax ID Tax Type Type Status	SSN Distributor Active		EDIT	juvenae.com/m CST at IP 174.2 NOTES	entered by Dis egblairlic/enrol 237.4.135 usini	Iment/submiti g Chrome 75.	checkout on W .0 (Unknown).	ednesday, July 1	1 15, 2020 1	:32PM
	Commission History	30	Enroller Sponsor	8 - Meg Blair 62 - Luis Rangel		Acco	unting PTION			BALANCE			



The recurring orders for the selected person are listed in the top right corner of the screen. Click on the ID that you want to modify. To cancel this recurring order, simply click the Red X.

Customer Summary	NEW CUSTOMER EDIT	сυ
	🕲 https://v5live2.exigo.com/admin6/v2020.10.7.2/ea5b5c906ab043ecb14dc97a02570ba6/AutoOrder/AutoOrderInvoice?customerId=3&autoOrderId=66 – 🛛 🖉	<
Customer Summary	Sv5live2.exigo.com/admin6/v2020.10.7.2/ea5b5c906ab043ecb14dc97a02570ba6/AutoOrder/AutoOrderInvoice?customerId=3&autoOrderId=66	
Local Ti	Recurring Order #66	
Addr	EDIT RECURRING ORDER CREATE ORDER HISTORY LISTING EMAIL	
Mail Addr Other Addr	Invoice Details	
Birthd	test 🔹 📾 🗶	
En		
	To Info	
Tax T	Name Test Joel CustomerID 3 Address 501 Svcamore LN Apt 1915	
Ty		

Once you have clicked on the Red X, you will be prompted to confirm that the recurring order is to be cancelled.

Recurring Order #66	Confirm Delete	×
Invoice Details	Are you sure you want to PERMANENTLY delete this Recurring Order?	
To Name Test Joel Address 501 Sycamore LN A	Recurring Order ID: 66	
	CANCEL DELETE RECURRING ORDER	R

NOTE: Please keep in mind that this will only cancel the recurring order. Any orders that were already generated by the recurring order will remain in their current status.

Custome	er Summary				NEW CUSTOMER	EDIT CUSTOMER TRANSFER	CHANGE LOGS - TERMINATE
Custome	r Summary		Recurring Or	ders			
S	Local Time	Maart 01, 2021 19:53 (UTC -6)	There are no	active Recurring	Orders.		
	Address	501 Sycamore LN Apt 1915 Euless TX 76039 United States	ADD NEW RE		R		
	Mail Address		Canceled Re	curring Orders			
	Birthdate	1900-01-01	ID	LAST	SUBTOTAL	CANCELLED	BY
	Phone	214-867-5309	66		\$61.00	0001-01-01	VIEW

If you wish to restore a Recurring Order, simply click on the recurring order ID. When the recurring order screen appears, click on the **Restore Recurring Order** button at the top and confirm it.



ecurring Order #6	Restore Recurring Order	0	×	
Invoice Details	This will restore a recurring order. If you choose OK, please make sure to verify payment information and recurring order schedules.			
Name Test Jc Address 501 Sy	Recurring Order ID: 66			
		IG ORL	JER	

This completes the process of cancelling and restoring a recurring order.