Editing Recurring Orders

v 1.1

Contents

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 auto-order. 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.

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:
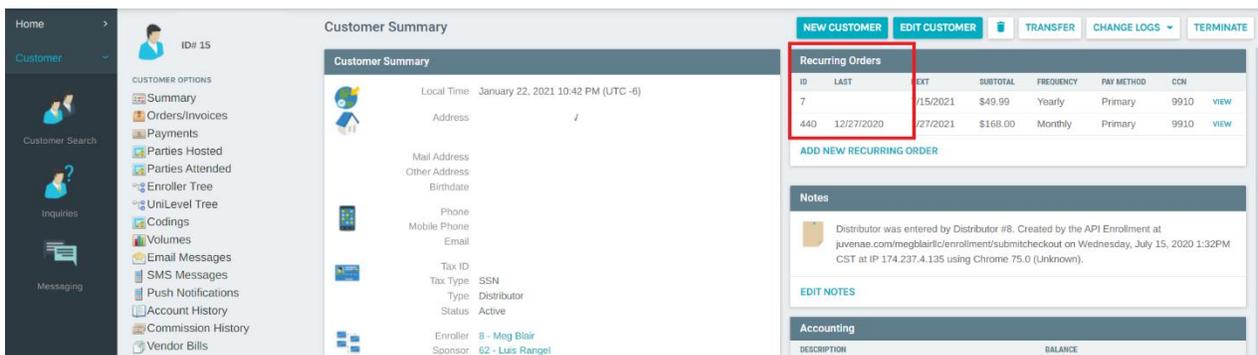
The recurring orders for the selected person are listed in the top right corner of the screen. Click on the ID that you want to modify. To cancel this recurring order, simply click the Red X.
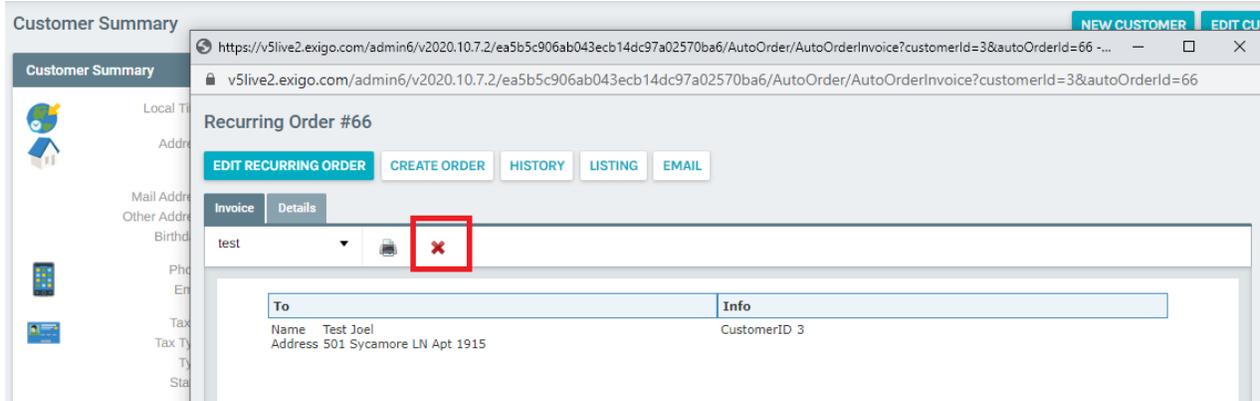
Once you have clicked on the Red X, you will be prompted to confirm that the recurring order is to be cancelled.
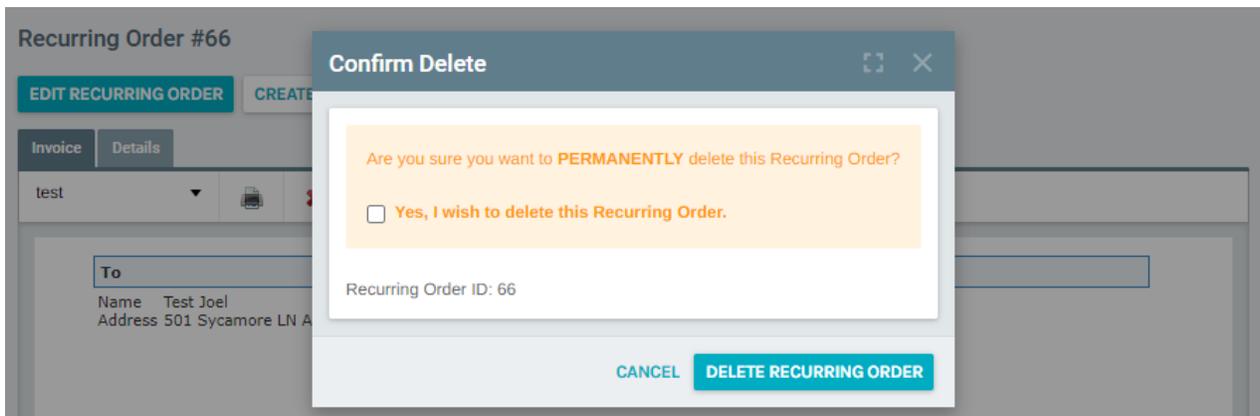
NOTE: Please keep in mind that this will only cancel the recurring order. Any orders that were already generated by the recurring order will remain in their current status.
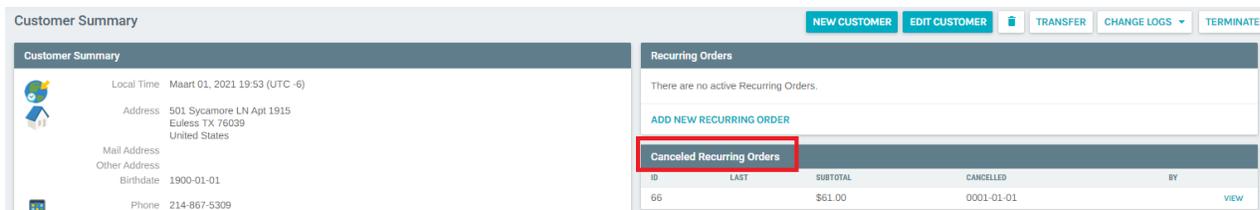
If you wish to restore a Recurring Order, simply click on the recurring order ID. When the recurring order screen appears, click on the **Restore Recurring Order** button at the top and confirm it.
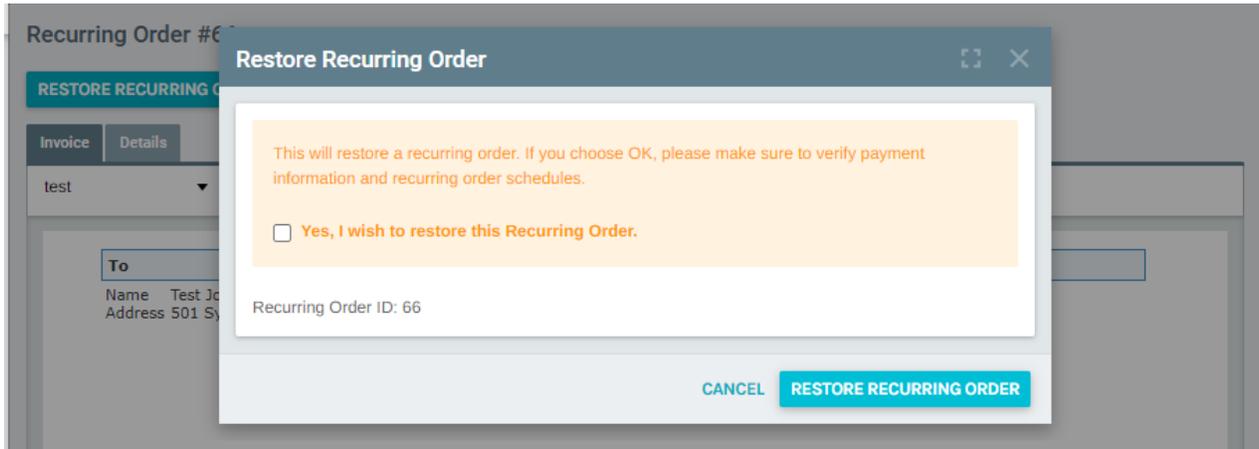
This completes the process of cancelling and restoring a recurring order.