



Core Admin Set Up

v 1.1

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What are Customer Types

Exigo refers to all types of Customers as Customers. All Customers receive a Customer ID. However, for other processes including Commissions, the Customer Type defines different types of Customers. The three most common Customer Types are: Retail, Preferred, and Distributor. This represents the hierarchy of Customer Type. The difference between the Customer Types is Business Process driven. The most common are reviewed briefly below.

Retail Customer receives the highest Pricing and has no opportunity to receive Bonuses or Commissions. *By default*, Retail Customers cannot enroll or sponsor any other Customer.

Preferred Customer receives better Pricing than the Retail Customer and some clients offer incentives. Typically, no Commissions are paid to this Customer Type. *By default*, Preferred Customers typically cannot enroll or sponsor any other Customer.

Distributor receives the best Pricing and can receive Bonuses and Commissions from the Orders of Customers in their downline. Distributors may also move up in Rank which provides additional incentives.

For Pricing, Bonuses, Commissions, and Ranks to calculate correctly, the Customer Type must be identified correctly.

What are Customer Status Types

Within each Customer Type there is also a need to distinguish the Status of the Customer. This Status may affect the Customer's ability to place Orders, Receive Commissions and Bonuses, Receive the correct Pricing, etc. The Client will define what Statuses are needed and will provide the rules for each. The most common Statuses are listed below with a brief explanation.

Active: The Customer is in good standing and can receive all benefits of their Customer Type.

Inactive: The Customer is still in good standing but has not placed an Order within the specified timeframe (i.e. 1 month). This may affect the benefits of their Customer Type.

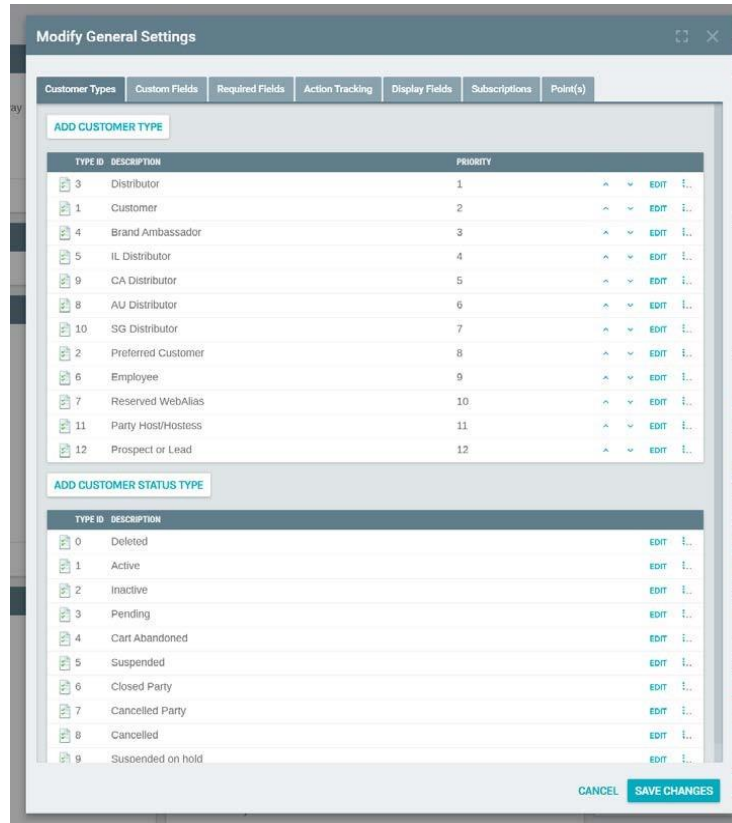
Suspended: The Customer is Not in good standing and all benefits of their Customer Type are temporarily stopped.

Terminated: The Customer is Not in good standing and is no longer be able to place Orders or receive benefits.

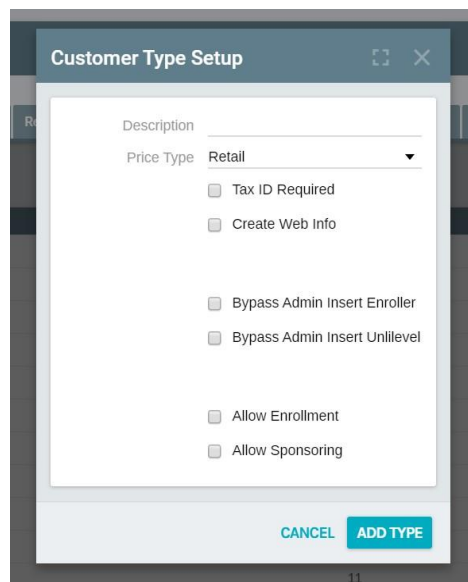
Clients can add additional customer status types through Admin to facilitate company needs.

How to set up Customer Type and Customer Status Type

- Log into Exigo.com, navigate to Administration > Settings > Company Settings > Customer Details
- Click on Modify Customer Settings



- To Add a new Customer Type, click **ADD CUSTOMER TYPE**. The following window will open.

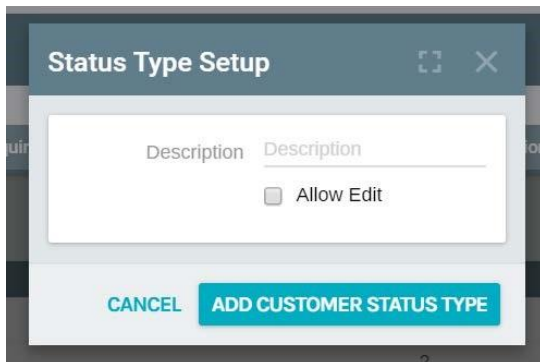


CUSTOMER TYPE FIELDS:

- **Description:** This is the name of the Customer Type (i.e. Retail). This will display throughout the system.
- **Price Type:** This is the relation of Customer Type to Price Type. Choose from the drop-down list.
- **Tax ID Required:** Check this box if this Customer Type will require a TAX ID at set up.
- **Create Web Info:** Check this box if this Customer Type should have Web information automatically generated at set up.
- **Bypass Admin Insert Enroller:** If toggled, this prevents Admin from automatically inserting the customer type you are creating into the enroller tree.
- **Bypass Admin Insert Unilevel:** If toggled, this prevents Admin from automatically inserting the customer type you are creating into the unilevel tree
- **Allow Enrollment:** If toggled, the customer type you are creating will be allowed to enroll other customers.
- **Allow sponsoring:** If toggled, the customer type you are creating will be allowed to sponsor other customers.
- Click **ADD TYPE** to save your changes.

How to Add a New Customer Status Type

- Log into Exigo.com and navigate to Administration > Settings > Company Settings > Customer Details
- Click on Modify Customer Settings in the Middle Column.
- To Add a new Customer Status Type, click **ADD CUSTOMER STATUS TYPE**. The following window will open.



- **Description:** This is the name of the Customer Status Type. This name will be displayed throughout the system.
- **Allow Edit:** If checked, the Customer Status Type will be editable.
- Click **ADD CUSTOMER STATUS TYPE** to save your changes.

What are Price Types

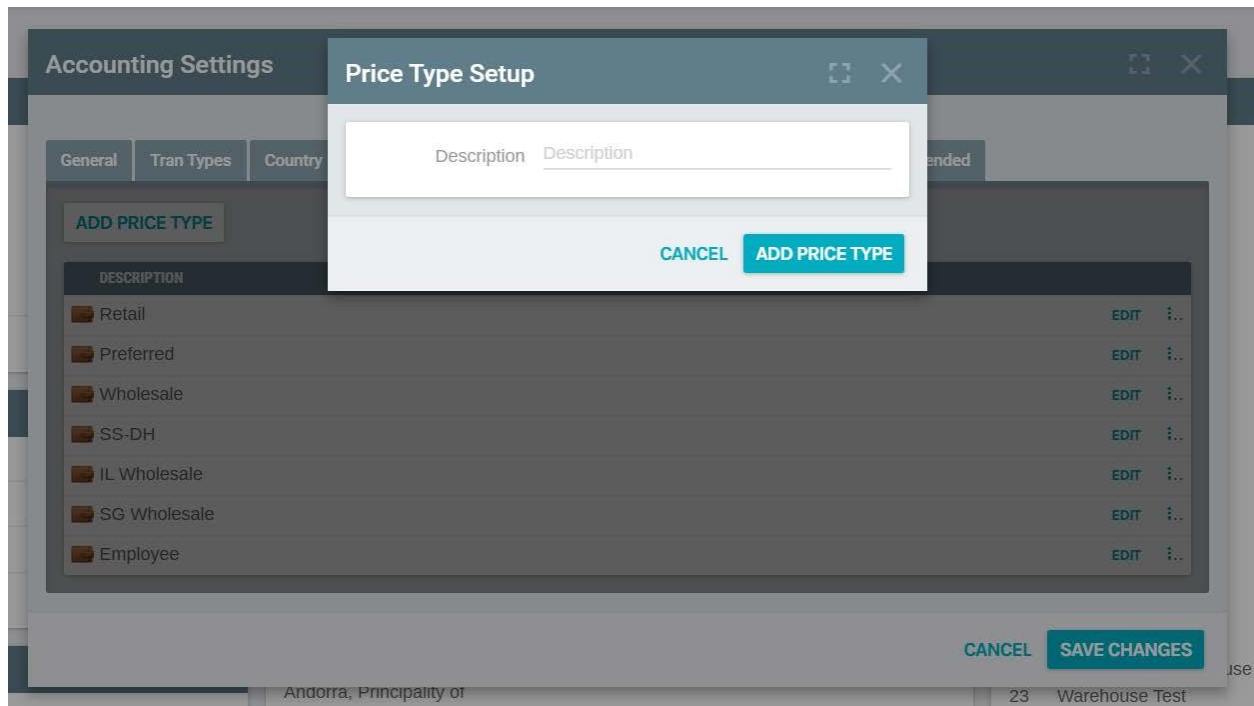
Clients often choose to give different Prices to different Customer Types. Distributors often pay wholesale prices while Retail Customers pay retail prices. Exigo will accept multiple Price Types to account for this. During Admin set up, the Price Types are named and tied to a Customer Type. The actual Prices are set up at the Item Level.

The most common Price Types and relation to Customer Types are as follows:

- **Retail Price = Retail Customer**
- **Preferred Price = Preferred Customer**
- **Wholesale Price = Distributor**

HOW TO SET UP A NEW PRICE TYPE

- Navigate to Administration > Settings > Accounting Settings > Price Type > Modify Price Type Settings
- To Add a new Price Type, click **ADD PRICE TYPE**.



Description: The name of the new Price Type. This name will be visible throughout the system. The Price Type will be associated with a Customer Type during Customer Type set up.

- Click **ADD PRICE TYPE** to save your changes.

Country, Language, and Currency

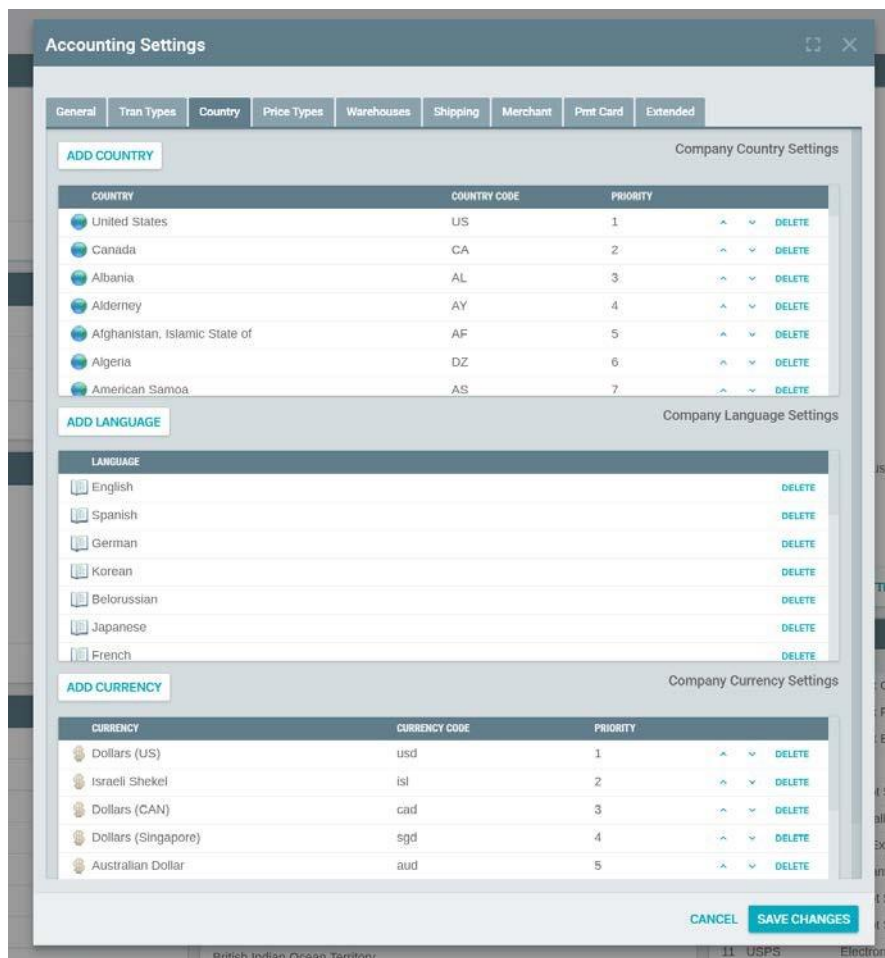
Countries, Languages, and Currencies are three of the core fields around which Exigo was built.

These items must be set up correctly for the system to function properly.

- **Countries:** The complete list of all Countries in which the Client will conduct business. This affects the ability to purchase products outside of the Countries listed.
- **Language:** The complete list of all Languages in which the Client will conduct business. This affects translations.
- **Currency:** The complete list of all Currencies in which the Client will conduct business. This affects Pricing at multiple points throughout the system. This also affects Warehouses, Customers, Items, Orders, Merchants, and Commissions.

HOW TO ADD A NEW COUNTRY, LANGUAGE AND CURRENCY

- Log in to Exigo.com and navigate to Administration > Settings > Accounting Settings > Country
- Click on **MODIFY COUNTRY SETTINGS**.



The screenshot shows the 'Accounting Settings' window with the 'Country' tab selected. It displays three sections: 'Company Country Settings', 'Company Language Settings', and 'Company Currency Settings'. Each section has an 'ADD' button and a table of existing items with 'DELETE' links.

COUNTRY	COUNTRY CODE	PRIORITY	
United States	US	1	DELETE
Canada	CA	2	DELETE
Albania	AL	3	DELETE
Alderney	AY	4	DELETE
Afghanistan, Islamic State of	AF	5	DELETE
Algeria	DZ	6	DELETE
American Samoa	AS	7	DELETE

LANGUAGE	
English	DELETE
Spanish	DELETE
German	DELETE
Korean	DELETE
Belorussian	DELETE
Japanese	DELETE
French	DELETE

CURRENCY	CURRENCY CODE	PRIORITY	
Dollars (US)	usd	1	DELETE
Israeli Shekel	isi	2	DELETE
Dollars (CAN)	cad	3	DELETE
Dollars (Singapore)	sgd	4	DELETE
Australian Dollar	aud	5	DELETE

At the bottom right of the window are 'CANCEL' and 'SAVE CHANGES' buttons.

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- **New Country:** Click **ADD COUNTRY**. Choose a Country from the drop-down list. Click **ADD COUNTRY**.
 - **New Language:** Click **ADD LANGUAGE**. Choose a Language from the drop-down list. Click **ADD LANGUAGE**.
 - **New Currency:** Click **ADD CURRENCY**. Choose a Currency from the drop-down list. Click **ADD CURRENCY**.
 - Click **SAVE CHANGES** from the page above to save all changes.

If you do not see the desired Country, Language, or Currency in the dropdowns, open a ticket to have the desired items added to your DB.

What is a Warehouse

The most common types of Warehouses in Exigo are Physical and Virtual Warehouses. A brief explanation is given below for each. Warehouse set up is required in Exigo. There must be at least one Warehouse listed, else Orders will not function properly.

- **Physical Warehouses:** These are warehouses which hold inventory and ship Orders from Exigo.
- **Virtual Warehouses:** These are warehouses which do not hold physical inventory and do not ship orders. Virtual Warehouses are commonly used for Orders containing Items that do not need to be shipped. Examples of this include Items which may be downloaded, or Items purchased at an Event or Party. The Items are already delivered and do not need Shipping.

WHAT ARE WAREHOUSE TOUCHPOINTS

Warehouses touch many components of Exigo.

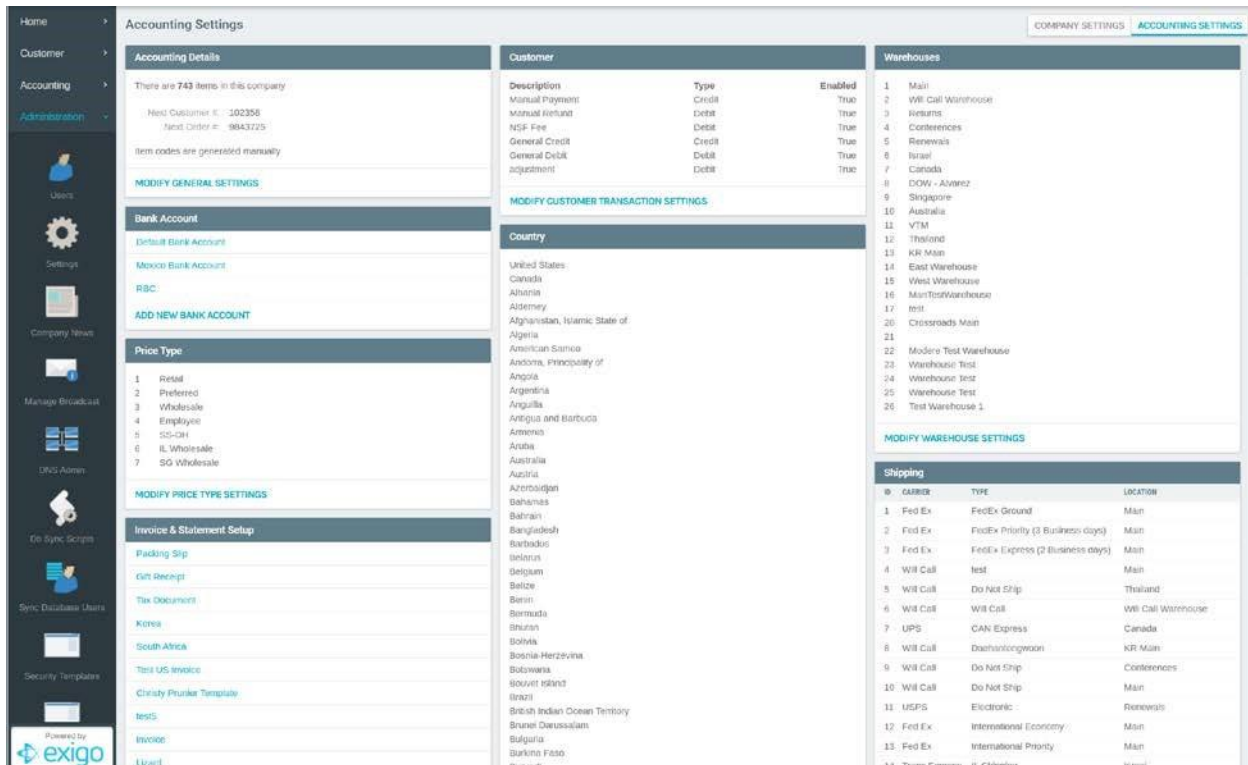
In this section, we will cover the basics of those touchpoints.

- **Items:** All Items in Exigo must be assigned to Warehouses to be sold. Items may be assigned to one Warehouse or multiple Warehouses. This is determined by the Client. *For more information on how to tie Items to Warehouses, please see the [Item Maintenance](#) resource.*
- **Orders:** All Orders in Exigo are assigned to a Warehouse. Typically, only Items available in the specified Warehouse are available to purchase on the Order. This is determined by the Client.
- **Customers:** All Customers in Exigo are assigned to a Warehouse. However, during the Order process, the Warehouse may be changed. If the Warehouse should be changed, this should be completed PRIOR to choosing Items for the Order. Not all Items are available in all Warehouses. The Customer's default Warehouse is determined at the time of Customer Set Up. *For more information on how Customers are tied to Warehouses, please see the [Customer Management](#) training module.*

- **Ship Methods:** All Ship Methods must be tied to a Warehouse. For example, a Warehouse may allow Will Call, UPS Ground, UPS Overnight, FedEx Ground, and FedEx Overnight. Each of these Ship Methods will be set up for the specified Warehouse. Not all Warehouses will offer the same Ship Methods. *For more information on how Ship Methods are tied to Warehouses, please see the [Shipping Setup](#) documentation.*
- **Invoices:** All Warehouses must be tied to an Invoice Template. These templates may be specific to the Warehouse, Country, etc. *For more information on how Invoice Templates are set up, please see the [Creating New Invoice Template](#) documentation.*
- **Currencies:** All Warehouses must have a Currency chosen as a default.
- **Merchant Accounts:** In Exigo Merchant Accounts are used to process payments for Orders (i.e. Credit Card Payments). Each Warehouse must be tied to at least one Merchant Account for Order purposes. *For more information on setting up merchant accounts, please see the [Merchant Account Setup for Credit Card and ACH](#) documentation.*

HOW TO CREATE A NEW WAREHOUSE

- Warehouses are located under Administration > Settings > Accounting Settings.

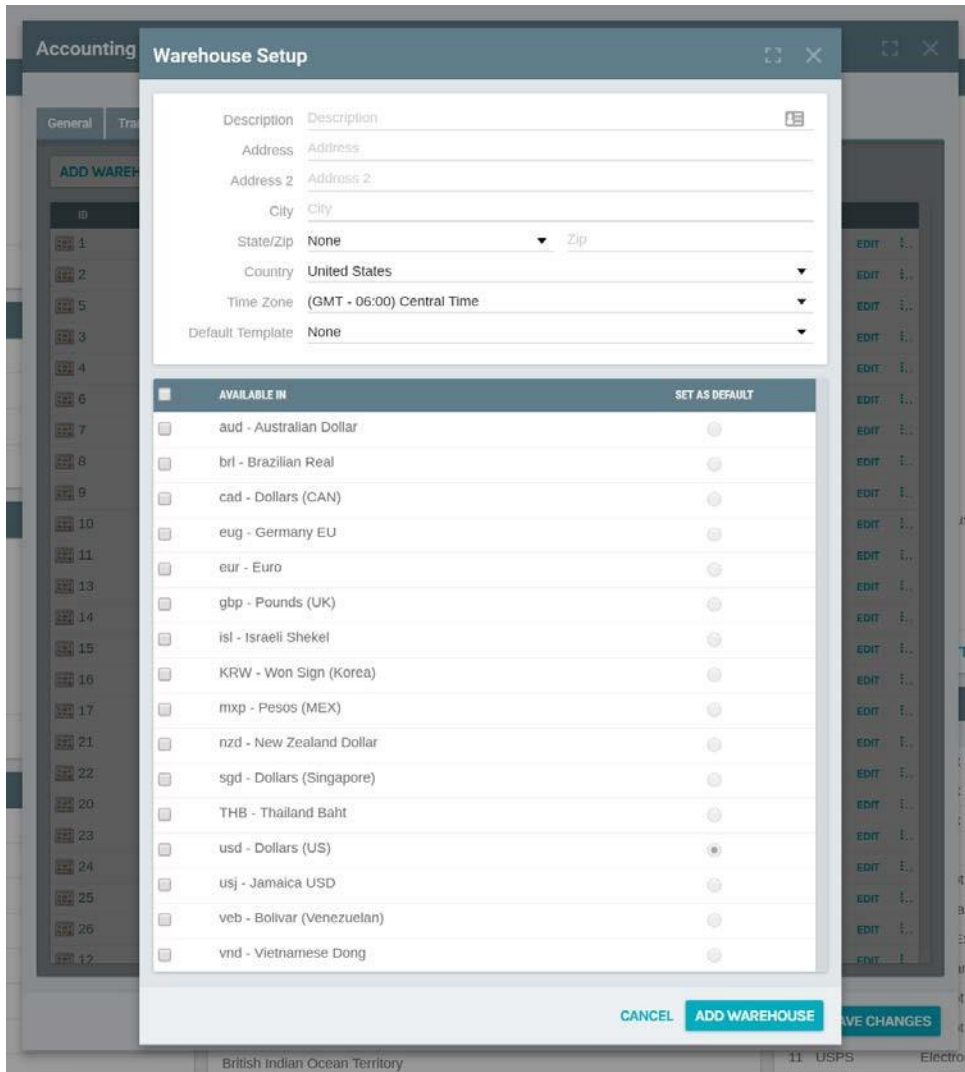


The screenshot shows the 'Accounting Settings' page in the Exigo system. The 'Warehouses' section is highlighted, displaying a list of 26 warehouses. Below this, the 'Shipping' table is visible, showing various carriers and their associated locations.

ID	CARRIER	TYPE	LOCATION
1	Fed Ex	FedEx Ground	Main
2	Fed Ex	FedEx Priority (3 Business days)	Main
3	Fed Ex	FedEx Express (2 Business days)	Main
4	Will Call	test	Main
5	Will Call	Do Not Ship	Thailand
6	Will Call	Will Call	Will Call Warehouse
7	UPS	CAN Express	Canada
8	Will Call	Dashinkongwan	KR Main
9	Will Call	Do Not Ship	Conferences
10	Will Call	Do Not Ship	Main
11	USPS	Electronic	Renewals
12	Fed Ex	International Economy	Main
13	Fed Ex	International Priority	Main
14	Thomson Reuters	Electronic	Iran

Step 1

- Click on Modify Warehouse Settings.



Step 2

- Click **ADD WAREHOUSE**. A new window will open as shown above. The information for the Warehouse should be fully completed to avoid any issues in processing.

Three key fields are reviewed below.

- **Description:** This field is the name of the Warehouse that will show at the Item, Order, and Customer Level. This name will be visible in the Admin and may be visible on the Invoice. A common name for a Warehouse may be "Dallas Distribution Center". Clients may choose to identify the Country in the naming convention (i.e. "US – Dallas").
- **Default Template:** This field refers to the Invoice Template to be used for this Warehouse. A Template must be chosen for processing to work correctly. Templates may be selected from the Drop-Down list.

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- **Currency:** All available Currencies will be listed in the bottom section of the screen. These are listed in 3-digit Currency Codes. You may choose "Select All" or select specific Currencies from the list. One Currency must be marked as the default for the Warehouse.
 - Once you have completed this page, click OK.

Step 3

The following options are also available on the Warehouses Tab: Edit, Delete, Move Up, and Move Down. A brief explanation of each is given below.

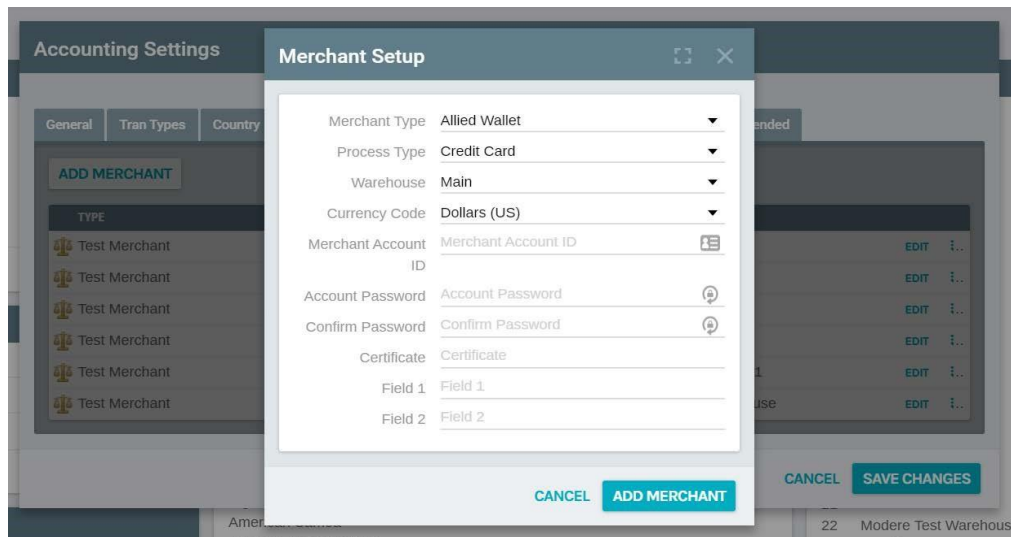
- **Edit:** This button allows the user to manage Warehouses after they are created. Clicking on this button will open a window very similar to the Add button. Changes to Warehouse Name, Address, Invoice Template, and Currency, may be made here.
- **Delete:** This button allows the user to delete a Warehouse. However, if any Orders are tied to this Warehouse an error will be received. Deletions will be covered in more detail in higher training level modules.
- **Move Up:** This button allows the user to change the order of Warehouses shown on the screen. This is commonly used to place Warehouses used the most at the top of the list. To Move a Warehouse up, simply click on the Warehouse and move it up the list.
- **Move Down:** This button allows the user to change the order of Warehouses shown on the screen. This is commonly used to place Warehouses used less often to the bottom of the list. To Move a Warehouse down, simply click on the Warehouse and move it down the list.
- After each change, remember to click **SAVE CHANGES** so that no changes are lost.

What is a Merchant

Exigo refers to a Merchant as a Third Party who will securely receive, process, and return payment information. Merchants are required to be able to charge credit cards or use ACH debit as a payment form. At least one merchant must be set up in the Admin.

HOW TO SET UP A MERCHANT

- Sign in to Exigo.com.
- Navigate to Administration > Settings > Accounting Settings > Merchant.
- Click on Modify Merchant Settings.
- Click **ADD MERCHANT**.



Field Descriptions:

- **Merchant Type:** Choose the Merchant to be added from the drop down list.
- **Process Type:** Choose the Type of processing to be done by the Merchant (i.e. Credit Card) from the drop down list.
- **Warehouse:** Choose the Warehouse to which the Merchant will be tied.
- **NOTE:** Because Merchants are set up by Warehouse, the Merchant may be repeated if it is tied to multiple Warehouses. If 10 Warehouses are using CMS as a Merchant, CMS will be listed 10 times.
- **Currency:** Choose the Currency in which this Merchant will conduct business at this Warehouse from the drop-down list
- **Merchant Account ID:** This information will be provided to the Client by the Merchant.
- **Account Password:** This information will be provided to the Client by the Merchant.
- **Confirm Password:** Re-entry of the Account Password for verification purposes.
- **Certificate:** This information will be provided to the Client by the Merchant.
- Click **ADD MERCHANT** to Add the Merchant.

What are Ship Methods

Ship Methods identify How an Order will be delivered and how the Shipping Calculation will be completed. The most common ship methods are FedEx Ground, UPS Ground, and Will Call. Don't confuse Ship Methods with Ship Carriers.

Ship Methods must be tied to Warehouses.

NOTE: Because Ship Methods are set up by Warehouse, the Ship Method may be repeated if it is tied to multiple Warehouses. If 10 Warehouses are using Will Call as a Ship Method, Will Call will be listed 10 times.

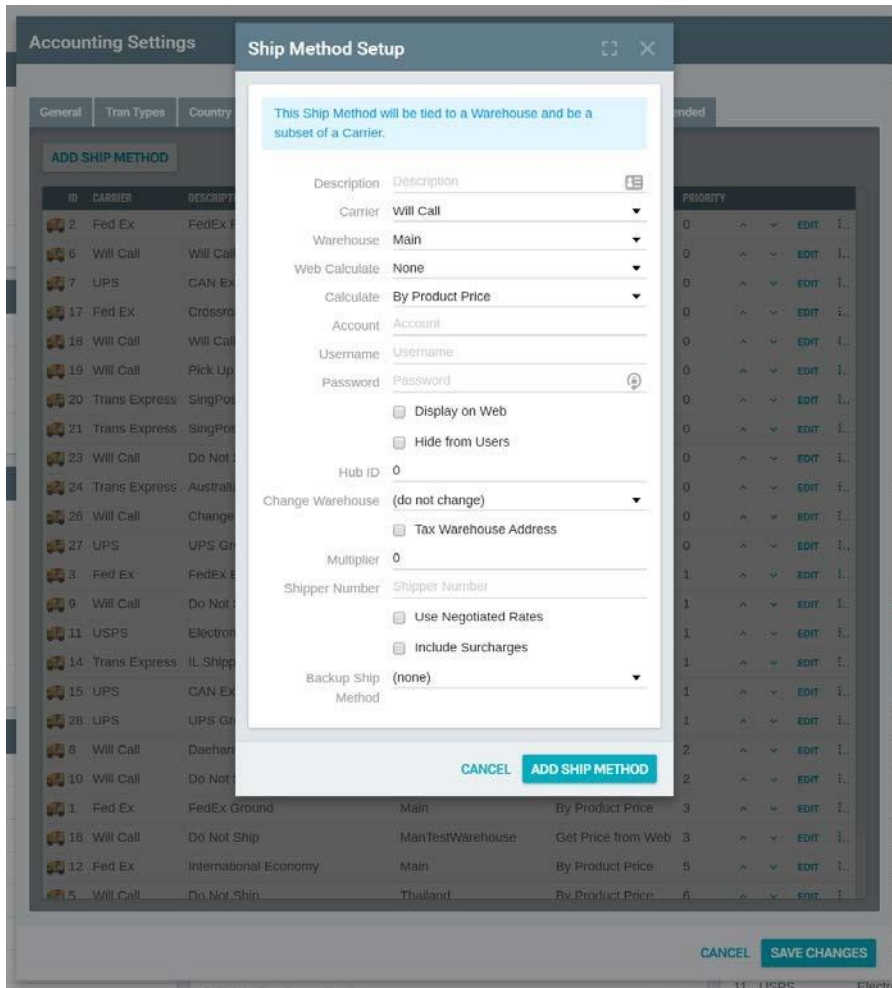
SHIPPING CALCULATIONS

Shipping Calculations may be done in one of three ways: By Product Price, By Product Weight, or by Get Price from the Web.

Each calculation type is defined below:

- **By Product Price:** This calculation method looks at the Sub-Total of the Order to determine Shipping Costs. If this method is chosen, then the Rate Ranges must be set up in the Admin. Directions for set up will be given with Ship Method Set Up.
- **By Product Weight:** This calculation method looks at the total weight of all Items in the Order to determine Shipping Costs. If this method is chosen, then the Rate Ranges must be set up in the Admin. Directions for set up will be given with Ship Method Set Up.
- **Get Price from Web:** This calculation method utilizes APIs to communicate with Carriers to determine Shipping Costs. If this method is chosen, Account Information must be set up in the Admin. Directions for set up will be given with Ship Method Set Up.

HOW TO CREATE A SHIP METHOD



Critical Ship Method Fields:

- **Description:** This is the Name of the Ship Method. This should be more descriptive than just the Carrier Name. A commonly used example is "FedEx Ground".
- **Carrier:** This is the name of the Carrier providing the Shipping. Choose the Carrier from the drop-down list.
- **Warehouse:** This is the Warehouse from which the Carrier will Ship. Choose the Warehouse from the drop-down list.
- **Calculate:** This is the method of Shipping Cost calculation. Choose the Calculate Method from the drop-down list. If "By Product Price" or "By Product Weight" is chosen, Rate Range Set Up is required. If Get Price from Web is chosen, the following fields are required.
- **Web Calculate:** This identifies the type of service to be calculated (i.e. FedEx Ground). Choose the correct value from the drop-down list.

- **Account:** This identifies the Account Number to be used in the call to the Carrier. This information is provided to the Client from the Carrier.
- **User Name:** This identifies the User Name associated with the Account Number. This information is provided by the Client.
- **Password:** This identifies the Password of the User Name associated with the Account Number. This information is provided by the Client.

How to Set Up Rate Ranges

If "By Product Price" or "By Product Weight" was chosen as the Calculate Method, then the Rate Ranges must be set up for Shipping to calculate correctly.

A Rate Range must be set up for each Currency.

- To Add a Rate Range, Navigate to Administration > Settings > Accounting Settings > Shipping > Modify Shipping Settings > To the right of the desired Ship Method, click the three dots > Click Edit Rate Range > Choose Currency. The following window will open.

Rate Range Editor

Currency: Dollars (US)

Enter the rates and ranges for **FedEx Priority (3 Business days)** using the grid below:

MIN RANGE	MAX RANGE		%	FLAT RATE	MIN CHARGE	
If amt between 0	and 0.099	then Shipping = amt * 0	% + Flat Amt: 0	with a Minimum of \$ 0		ADD
If amt between 0.1	and 249.999	then Shipping = amt * 0	% + Flat Amt: 14.85	with a Minimum of \$ 0		REMOVE
If amt between 250	and 610.999	then Shipping = amt * 0	% + Flat Amt: 16.3	with a Minimum of \$ 0		REMOVE
If amt between 611	and 900.999	then Shipping = amt * 0	% + Flat Amt: 21.5	with a Minimum of \$ 0		REMOVE
If amt between 901	and 1600.999	then Shipping = amt * 0	% + Flat Amt: 21.98	with a Minimum of \$ 0		REMOVE
If amt between 1601	and 3200.999	then Shipping = amt * 0	% + Flat Amt: 32.34	with a Minimum of \$ 0		REMOVE
If amt between 3201	and 6000.999	then Shipping = amt * 0	% + Flat Amt: 55.11	with a Minimum of \$ 0		REMOVE
If amt between 6001	and 9998.999	then Shipping = amt * 0	% + Flat Amt: 95.51	with a Minimum of \$ 0		REMOVE
If amt between 9999	and 13998.999	then Shipping = amt * 0	% + Flat Amt: 118.87	with a Minimum of \$ 0		REMOVE
If amt between 13999	and 9999999999	then Shipping = amt * 0	% + Flat Amt: 126.04	with a Minimum of \$ 0		REMOVE

CANCEL
SAVE CHANGES

-
- **Amt Between:** The Amt is a unit of measure. If "By Product Price" was chosen, the unit of measure will be Prices by Currency. Each Amt must have a low value and high value. If "By Product Weight" was chosen, the unit of measure may be in ounces, grams, pounds, etc. The system is agnostic to units of measure. However, the unit of measure must be consistent throughout the range (i.e. utilize ounces).
 - **Amt * %:** This Amt field may be used if the Shipping Calculation will utilize a percentage of the unit of measure.
 - **Flat Amt:** This Amt field may be used if the Shipping Calculation will utilize a Flat Amount based on the unit of measure.
 - **Minimum of:** This is the Minimum Shipping Cost to be used for a specific unit of measure range.
 - [+] Clicking on this symbol will add another line.
 - [X] Clicking on this symbol will delete the line.

Congratulations! You have completed the Core Admin Set Up training module.