



# Core Admin Set Up

v 1.0

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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 differences 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. 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. 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 his downline. Distributors may also move up in Rank which provides additional incentives.

In order for the 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 his Customer Type.

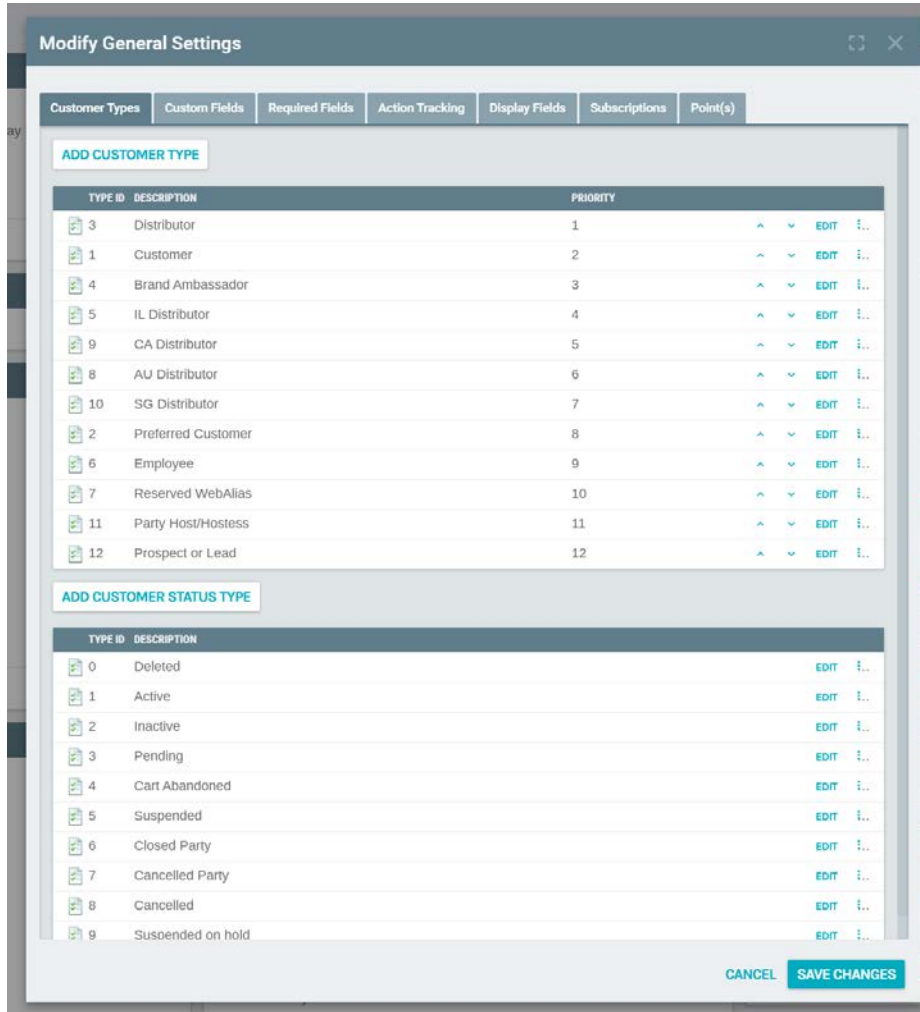
**Inactive:** The Customer is still in good standing but has not placed an Order within the specified timeframe (i.e. 1 month). This may affect the benefits of his Customer Type.

**Suspended:** The Customer is Not in good standing and all benefits of his 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.

## How to set up Customer Type and 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.



The screenshot shows the 'Modify General Settings' window with the 'Customer Types' tab selected. Below the tab are two tables for managing customer types and status types.

**ADD CUSTOMER TYPE**

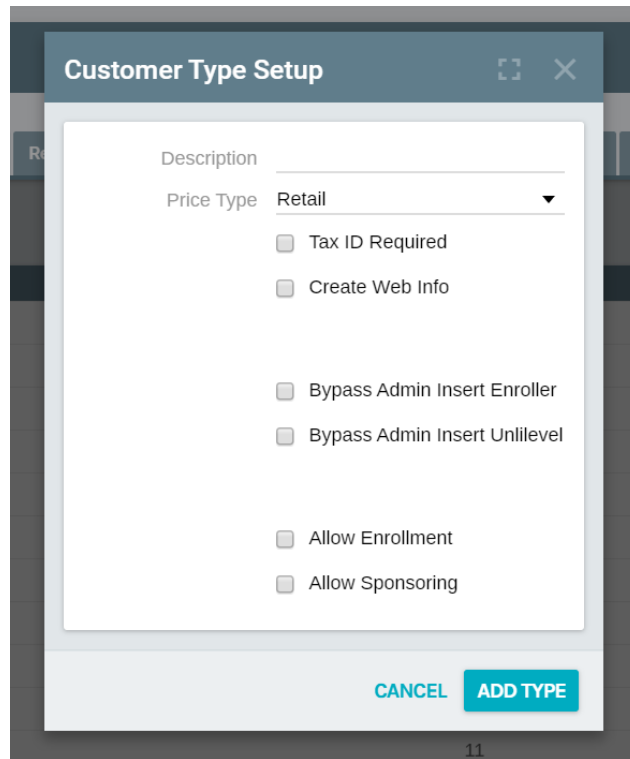
TYPE ID	DESCRIPTION	PRIORITY			EDIT	...
3	Distributor	1	▲	▼	EDIT	...
1	Customer	2	▲	▼	EDIT	...
4	Brand Ambassador	3	▲	▼	EDIT	...
5	IL Distributor	4	▲	▼	EDIT	...
9	CA Distributor	5	▲	▼	EDIT	...
8	AU Distributor	6	▲	▼	EDIT	...
10	SG Distributor	7	▲	▼	EDIT	...
2	Preferred Customer	8	▲	▼	EDIT	...
6	Employee	9	▲	▼	EDIT	...
7	Reserved WebAlias	10	▲	▼	EDIT	...
11	Party Host/Hostess	11	▲	▼	EDIT	...
12	Prospect or Lead	12	▲	▼	EDIT	...

**ADD CUSTOMER STATUS TYPE**

TYPE ID	DESCRIPTION	EDIT	...
0	Deleted	EDIT	...
1	Active	EDIT	...
2	Inactive	EDIT	...
3	Pending	EDIT	...
4	Cart Abandoned	EDIT	...
5	Suspended	EDIT	...
6	Closed Party	EDIT	...
7	Cancelled Party	EDIT	...
8	Cancelled	EDIT	...
9	Suspended on hold	EDIT	...

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

- To Add a new Customer Type, click Add. The following window will open.

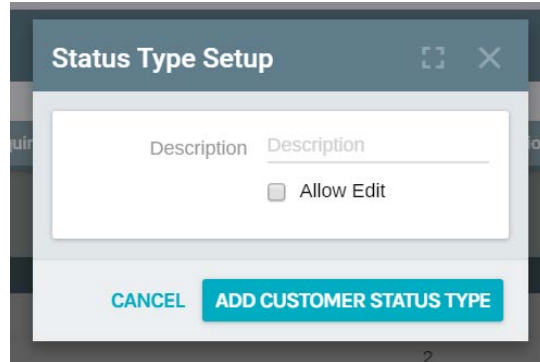


#### CUSTOMER TYPE FIELDS:

- **Description:** This is the name of the Customer Type (i.e. Retail). This will display throughout the system.
- **Price ID:** 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.
- **Automatically Create Web Info:** Check this box if this Customer Type should have Web information automatically generated at set up.
- **Bypass Admin Insert Enroller:** This will be reviewed in future training modules.
- **Bypass Admin Insert Unilevel:** This will be reviewed in future training modules
- **Do NOT allow enrollment:** This will be reviewed in future training modules
- **Do NOT allow sponsoring:** this will be reviewed in future training modules.
- Click OK 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. 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 OK to save your changes.

## What are Price Types

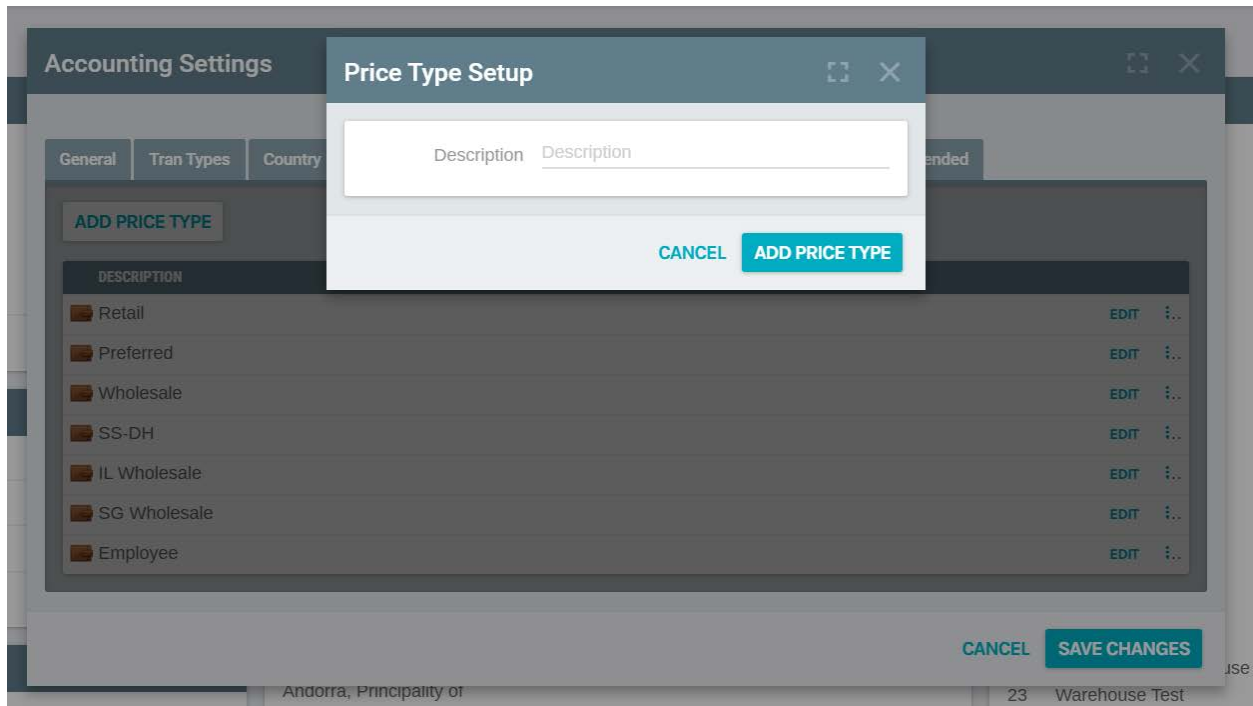
Clients often choose to give different Price levels to different Customer Types. Distributors often pay wholesale prices while Retail Customers pay retail prices. Exigo will accept multiple Price Types to account for this. During Admin set up, the Price Types are named and tied to a Customer Type. The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



**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 OK to save your changes.
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## Country, Language, and Currency

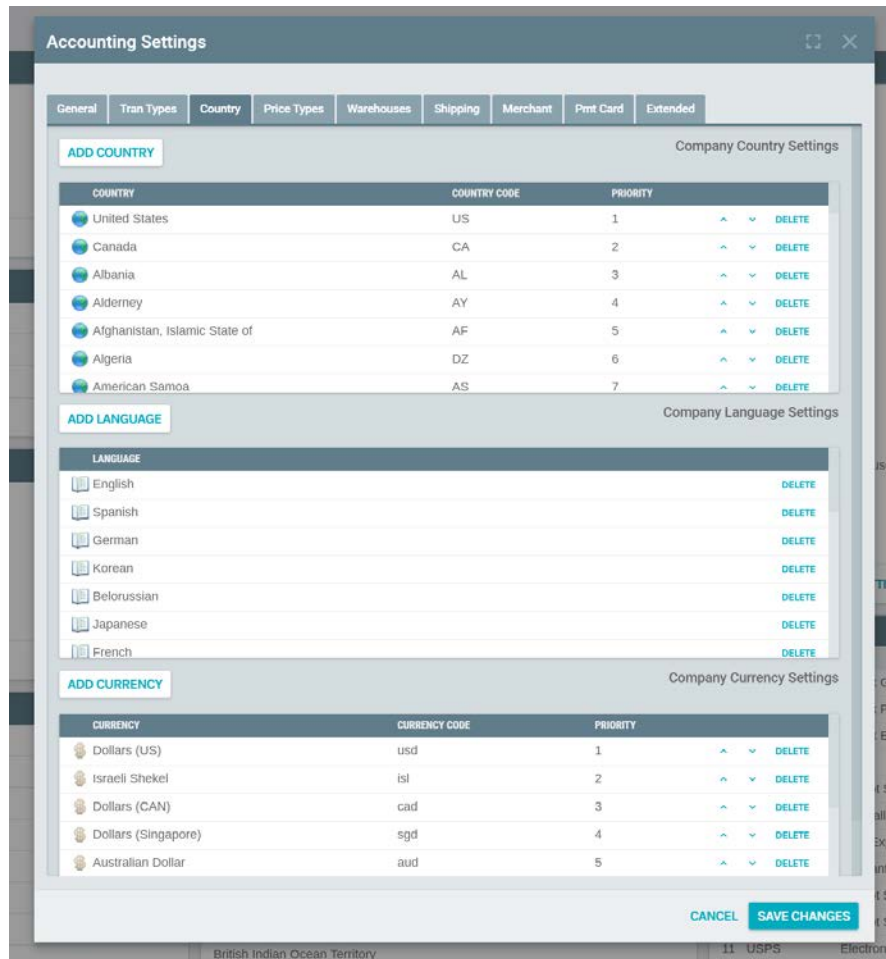
Countries, Languages, and Currencies are three of the core fields around which Exigo was built.

**These items must be set up correctly in order 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.



- **New Country:** Click Add. Choose a Country from the drop down list. Click OK.
- **New Language:** Click Add. Choose a Language from the drop down list. Click OK.
- **New Currency:** Click Add. Choose a Currency from the drop down list. Click OK.
- Click **OK** from the page above to save all changes.

## 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



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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 in order 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 Management Level 1 training module.
- **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. For more information on how Orders are tied to Warehouses, please see the Order Management Level 1 training module.
- **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 Level 1 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 Core Admin Set Up: Ship Methods Level 1 training module.
- **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 Core Admin Set Up: Invoices Level 1 training module.
- **Currencies:** All Warehouses must have a Currency chosen as a default. For more information on how to set up Currencies, please see the Core Admin Set Up: Currencies Level 1 training module.
- **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.

## HOW TO CREATE A NEW WAREHOUSE

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

Home

Customer

Accounting

Administration

Users

Settings

Company News

Manage Broadcast

DFS Admin

Do Sync Scripts

Sync Database Users

Security Templates

Powered by

### Accounting Settings

**Accounting Details**

There are 743 items in this company

Next Customer ID: 102358  
Next Order ID: 9943725

Item codes are generated manually

[MODIFY GENERAL SETTINGS](#)

**Bank Account**

Default Bank Account

Mexico Bank Account

RBC

[ADD NEW BANK ACCOUNT](#)

**Price Type**

- 1 Retail
- 2 Preferred
- 3 Wholesale
- 4 Employee
- 5 SO-01
- 6 IL Wholesale
- 7 SO Wholesale

[MODIFY PRICE TYPE SETTINGS](#)

**Invoice & Statement Setup**

Packing Slip

Get Receipt

Tax Document

Korea

South Africa

Test US Invoice

Christy Plunker Template

test5

Invoice

Label

**Customer**

Description	Type	Enabled
Manual Payment	Credit	True
Manual Refund	Debit	True
NSF Fee	Debit	True
General Credit	Credit	True
General Debit adjustment	Debit	True

[MODIFY CUSTOMER TRANSACTION SETTINGS](#)

**Country**

United States

Canada

Albania

Algeria

Afghanistan, Islamic State of

Algeria

American Samoa

Andorra, Principality of

Angola

Argentina

Anguilla

Antigua and Barbuda

Armenia

Aruba

Australia

Austria

Azerbaijan

Bahrain

Bangladesh

Barbados

Belarus

Belgium

Belize

Berlin

Bermuda

Bhutan

Bolivia

Bosnia-Herzegovina

Bolivia

Bolivia

Bouvet Island

Brazil

British Indian Ocean Territory

Brunei Darussalam

Bulgaria

Burkina Faso

Burundi

**Warehouses**

- 1 Main
- 2 WI Call Warehouse
- 3 Issums
- 4 Conferences
- 5 Renewals
- 6 Israel
- 7 Canada
- 8 DOW - Alvarez
- 9 Singapore
- 10 Australia
- 11 VTM
- 12 Thailand
- 13 KR Main
- 14 East Warehouse
- 15 West Warehouse
- 16 MainTestWarehouse
- 17 test
- 20 Crossroads Main
- 21
- 22 Modern Test Warehouse
- 23 Warehouse Test
- 24 Warehouse Test
- 25 Warehouse Test
- 26 Test Warehouse 1

[MODIFY WAREHOUSE SETTINGS](#)

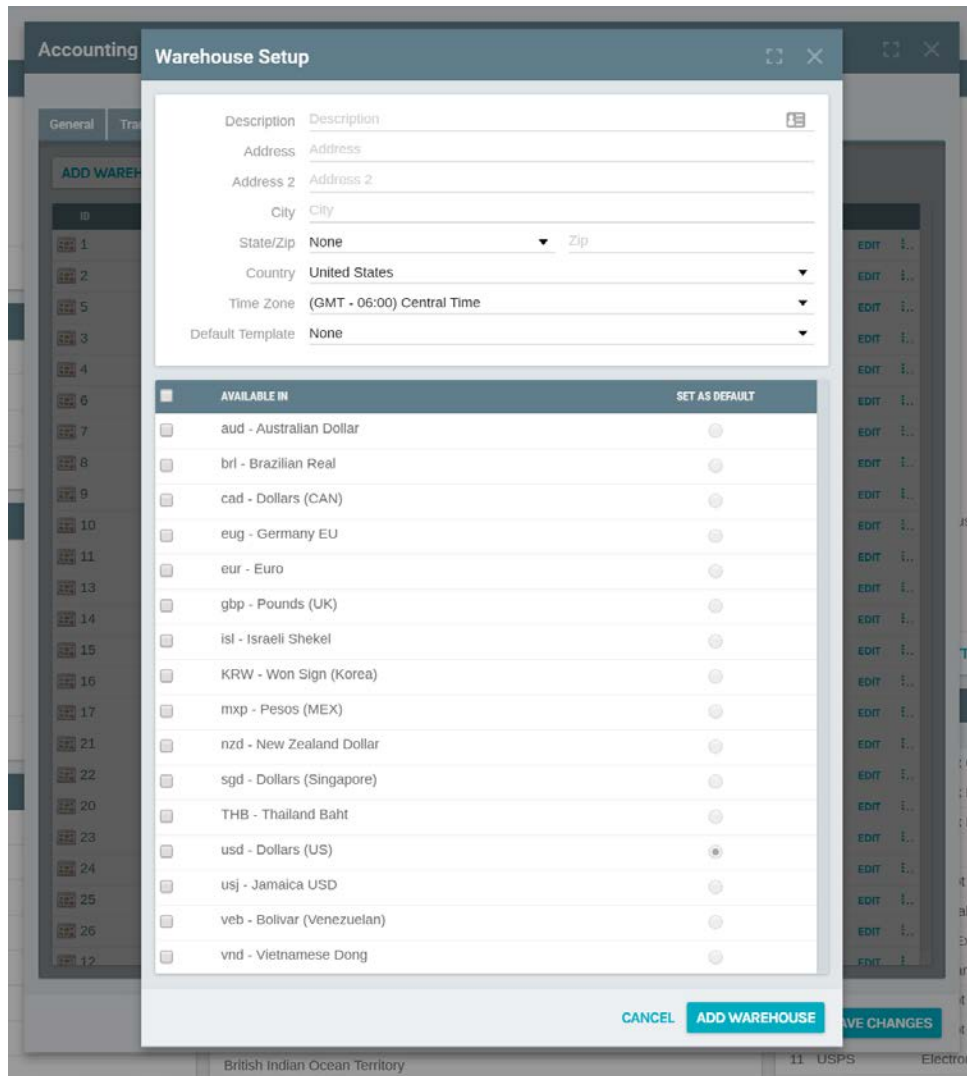
**Shipping**

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	WI Call Warehouse
7	UPS	CAN Express	Canada
8	Will Call	Daohantongwoon	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	Tham Express	IL Shipping	Israel

## Step 1

- Click on Modify Warehouse Settings.

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## Step 2

- Click "Add". 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.

- 
- **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.

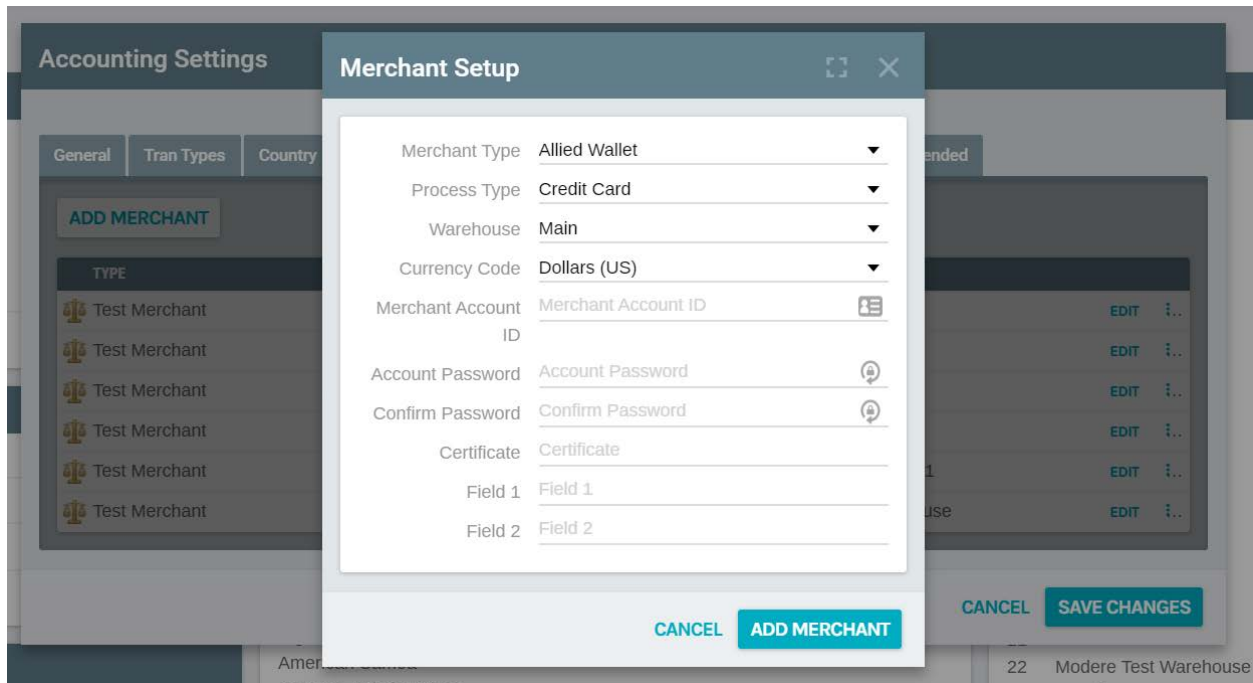
- **Edit:** This button allows the user to manage Warehouses after they are created. Clicking on this button will open a window very similar to the Add button. Changes to Warehouse Name, Address, Invoice Template, and Currency, may be made here.
- **Delete:** This button allows the user to delete a Warehouse. 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 **OK** 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.



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 from the drop down list in which this Merchant will conduct business at this Warehouse.
- **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 **OK** to Add the Merchant.

## What are Ship Methods

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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.

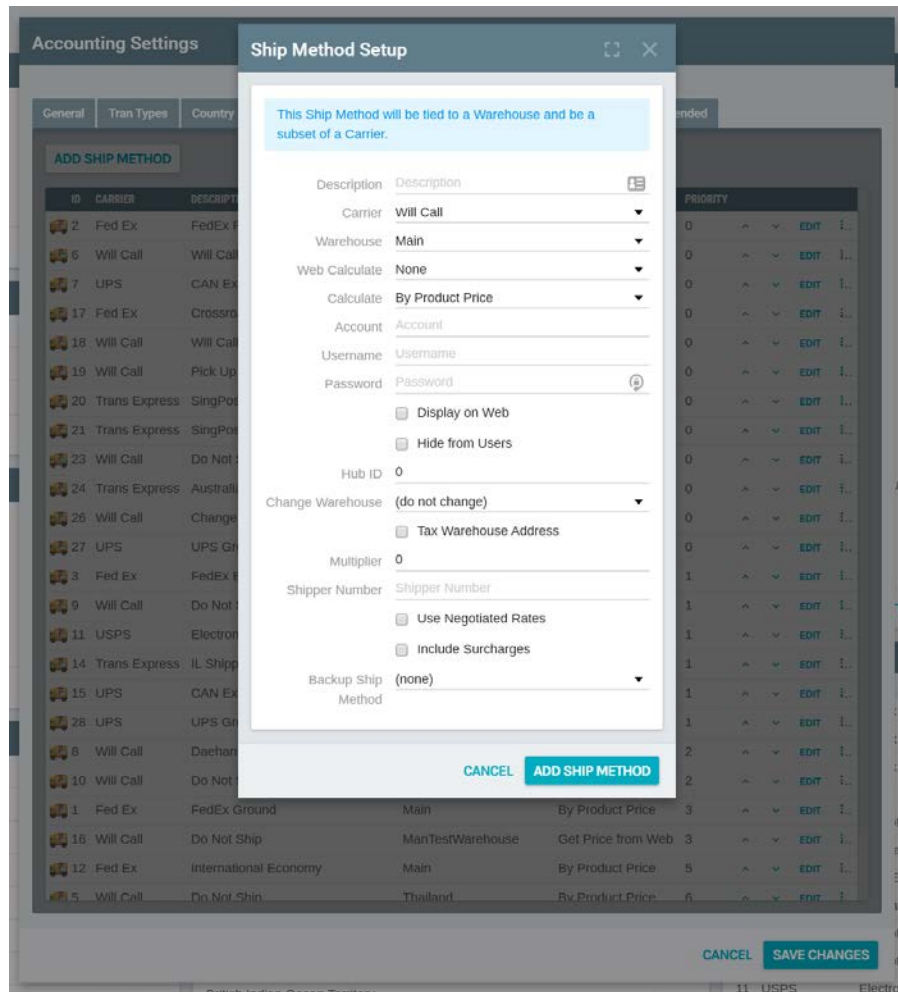
## SHIPPING CALCULATIONS

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.

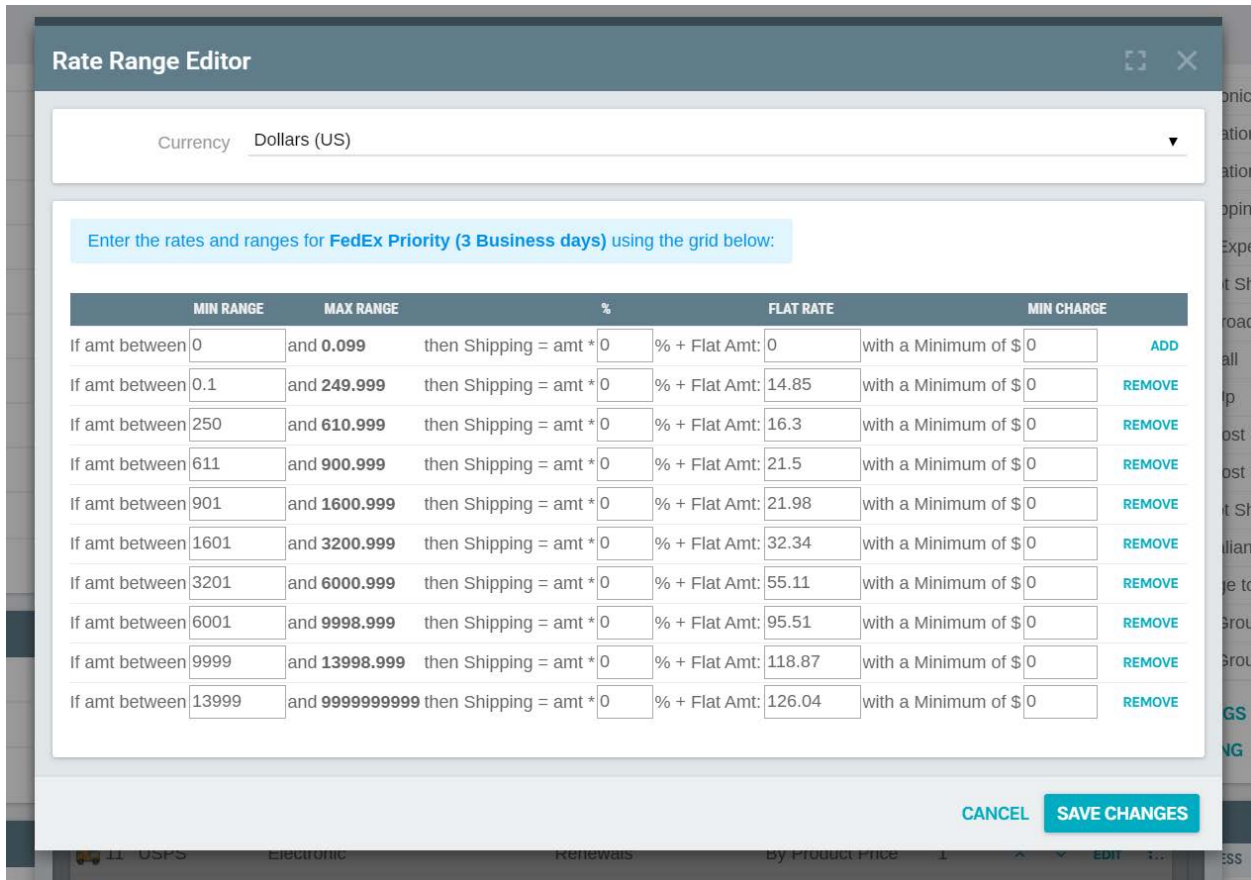
- **User Name:** This identifies the User Name associated with the Account Number. This information is provided by the Client.
- **Password:** This identifies the Password of the User Name associated with the Account Number. This information is provided by the Client.

## 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 in order 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 > Select Ship Method > 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	<b>ADD</b>
If amt between 0.1 and 249.999		then Shipping = amt * 0 % + Flat Amt: 14.85	with a Minimum of \$ 0	<b>REMOVE</b>
If amt between 250 and 610.999		then Shipping = amt * 0 % + Flat Amt: 16.3	with a Minimum of \$ 0	<b>REMOVE</b>
If amt between 611 and 900.999		then Shipping = amt * 0 % + Flat Amt: 21.5	with a Minimum of \$ 0	<b>REMOVE</b>
If amt between 901 and 1600.999		then Shipping = amt * 0 % + Flat Amt: 21.98	with a Minimum of \$ 0	<b>REMOVE</b>
If amt between 1601 and 3200.999		then Shipping = amt * 0 % + Flat Amt: 32.34	with a Minimum of \$ 0	<b>REMOVE</b>
If amt between 3201 and 6000.999		then Shipping = amt * 0 % + Flat Amt: 55.11	with a Minimum of \$ 0	<b>REMOVE</b>
If amt between 6001 and 9998.999		then Shipping = amt * 0 % + Flat Amt: 95.51	with a Minimum of \$ 0	<b>REMOVE</b>
If amt between 9999 and 13998.999		then Shipping = amt * 0 % + Flat Amt: 118.87	with a Minimum of \$ 0	<b>REMOVE</b>
If amt between 13999 and 9999999999		then Shipping = amt * 0 % + Flat Amt: 126.04	with a Minimum of \$ 0	<b>REMOVE</b>

**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



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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 Level 1 training module.