



Order Management: Creating Recurring Orders

v 1.0

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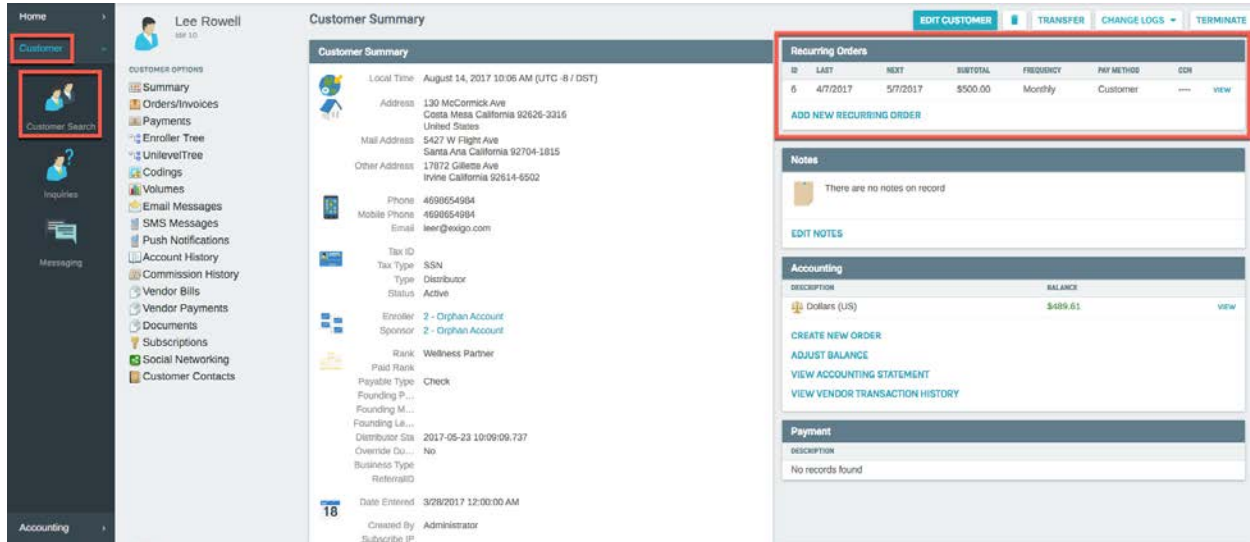
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Creating a Recurring Order

To create a new Recurring Order, first go to the Customer Record to whom the Recurring Order will belong.

Customer Search > Customer Record

The Recurring Order section is located in the upper right corner of the screen as shown below:

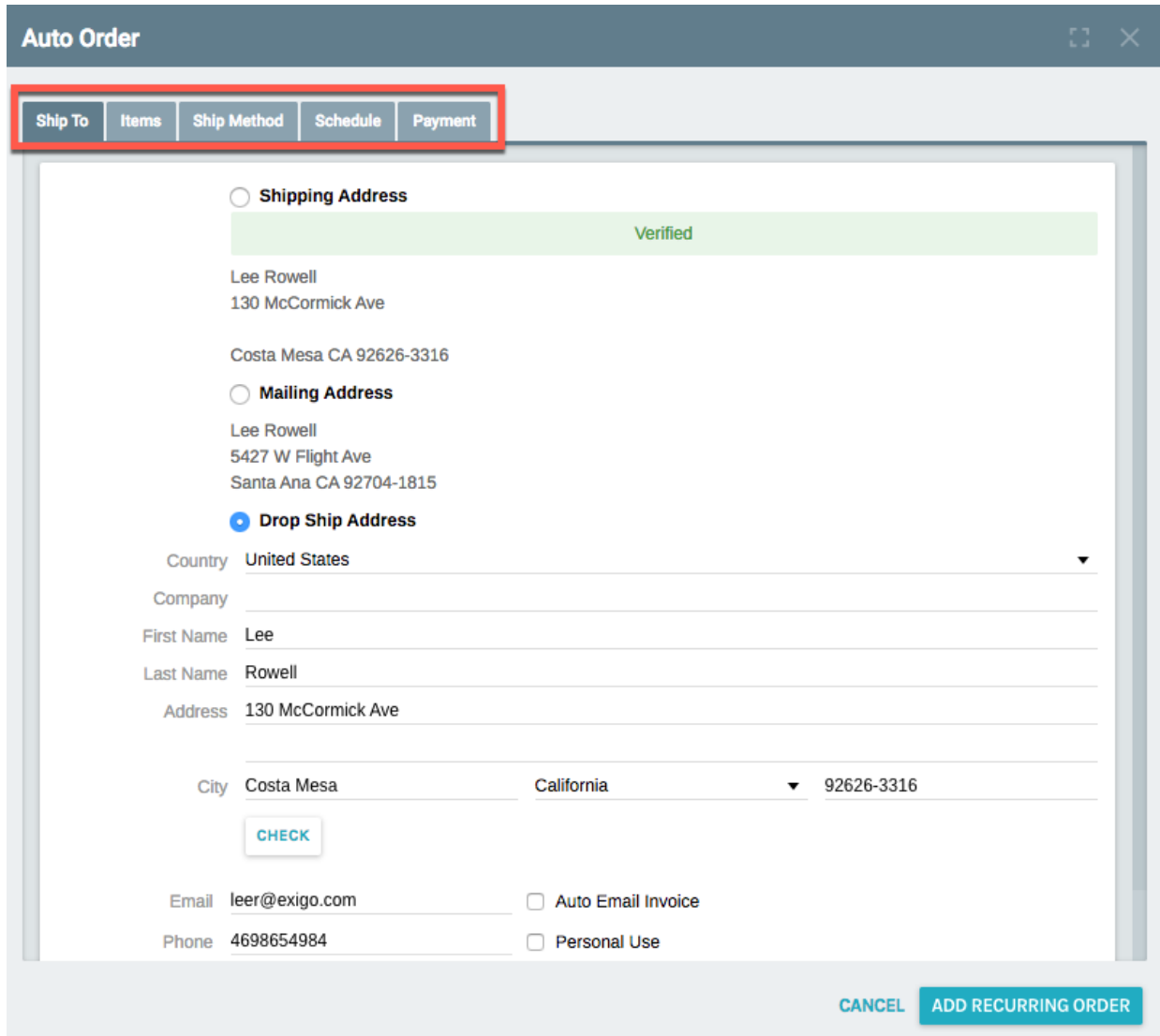


The screenshot displays the 'Customer Summary' page for Lee Rowell. The 'Recurring Orders' section is highlighted with a red box. It contains a table with the following data:

ID	LAST	NEXT	SUBTOTAL	FREQUENCY	PAY METHOD	CDR	
6	4/7/2017	5/7/2017	\$500.00	Monthly	Customer	---	VIEW

Below the table is an 'ADD NEW RECURRING ORDER' button. Other sections visible include 'Notes' (no notes on record), 'Accounting' (balance of \$489.61), and 'Payment' (no records found).

To create a New Recurring Order, click on “Add New Recurring Order”. The following window will be displayed:



Auto Order

Ship To | Items | Ship Method | Schedule | Payment

Shipping Address

Verified

Lee Rowell
130 McCormick Ave
Costa Mesa CA 92626-3316

Mailing Address

Lee Rowell
5427 W Flight Ave
Santa Ana CA 92704-1815

Drop Ship Address

Country United States

Company _____

First Name Lee

Last Name Rowell

Address 130 McCormick Ave

City Costa Mesa California 92626-3316

Email leer@exigo.com Auto Email Invoice

Phone 4698654984 Personal Use

NOTE: Each of the Tabs (Ship To, Items, Ship Method, Schedule, and Payment) must be completed prior to clicking on “Add Recurring Order”.

SHIP TO TAB

The Ship To Tab is shown on the previous screen shot.

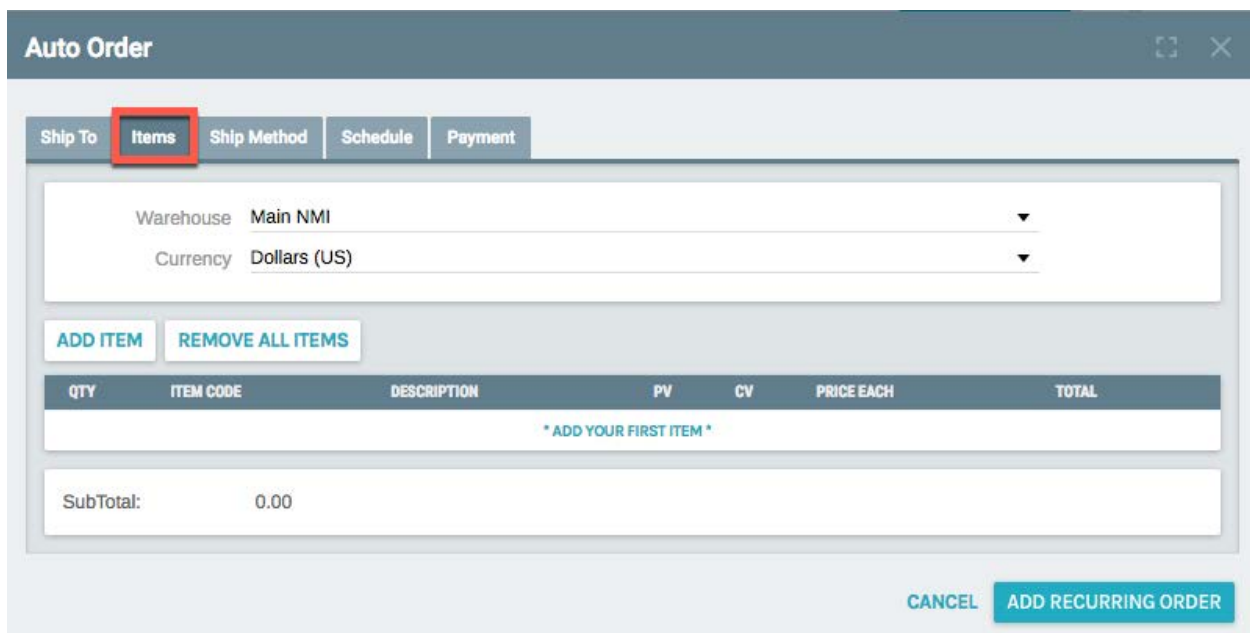
Exigo has the ability to store up to 3 addresses for each Customer.

Addresses are prepopulated into the Order Template when creating a new order. The Address may be changed for this Order from this screen.

Once the Ship To information has been completed, click on the "Items" Tab.

ITEMS TAB

The Items Tab allows the selection of one or more Items to be added to the Auto Order Template.



The screenshot shows the 'Auto Order' window with the 'Items' tab selected. The 'Warehouse' is set to 'Main NMI' and the 'Currency' is set to 'Dollars (US)'. There are buttons for 'ADD ITEM' and 'REMOVE ALL ITEMS'. Below is a table with columns: QTY, ITEM CODE, DESCRIPTION, PV, CV, PRICE EACH, and TOTAL. The table is currently empty with a message '* ADD YOUR FIRST ITEM *'. At the bottom, there is a 'SubTotal: 0.00' and buttons for 'CANCEL' and 'ADD RECURRING ORDER'.

QTY	ITEM CODE	DESCRIPTION	PV	CV	PRICE EACH	TOTAL
* ADD YOUR FIRST ITEM *						

SubTotal: 0.00

Before choosing any Items to be added to the Order, ensure that the Correct Warehouse and Currency are chosen.

After you add Items, changing Warehouse and Currency will not be allowed and may result in an error.

To begin adding Items to the Recurring Order, click on "Add Item".

The following window will open:

Manage Order Items ✕

Add Product Advanced

Item Code:

Enter item code or search string

SEARCH ITEMS

CANCEL ADD ITEM

Enter the Item Code or the first few characters of the Item Code, then click “Search Items” to locate the Item.

Manage Order Items ✕

Found: 10 Items

Add Product Advanced

Item Code:

Enter item code or search string

SEARCH ITEMS

ITEM CODE	DESCRIPTION	PRICE EACH	QUANTITY	
10-P002-01	Core Wellness Pack	\$ 209.95	Not Specified	SELECT ONE
10-S009-01	Digestive	\$ 29.95	Not Specified	SELECT ONE
10-S005-01	Energy+	\$ 44.95	Not Specified	SELECT ONE
10-P003-01	Family Wellness Pack	\$ 419.95	Not Specified	SELECT ONE
10-P004-01	Founders Pack	\$ 699.95	Not Specified	SELECT ONE
10-P001-01	FundaMentals Pack	\$ 149.95	Not Specified	SELECT ONE
10-S001-01	MentaBiotics	\$ 74.95	Not Specified	SELECT ONE
10-S002-01	MentaFocus	\$ 44.95	Not Specified	SELECT ONE
10-S003-01	MentaSync	\$ 54.95	Not Specified	SELECT ONE
10-S006-01	Mood+	\$ 59.95	Not Specified	SELECT ONE

CANCEL ADD ITEM

Select an Item by clicking on "Select One".

The following window will be displayed:

Manage Order Items ✕

Found: 10 Items

Add Product
Advanced

Item Code: SEARCH ITEMS

Enter item code or search string

Override Price

ITEM CODE	DESCRIPTION	PRICE EACH	QUANTITY	TOTAL
10-P002-01	Core Wellness Pack	\$ 209.95	1	\$ 209.95

CANCEL
ADD ITEM

Type the appropriate Quantity and then click "Add Item".

The following window will be displayed:

Auto Order ✕

Ship To
Items
Ship Method
Schedule
Payment

Warehouse Main NMI ▼

Currency Dollars (US) ▼

ADD ITEM
REMOVE ALL ITEMS

QTY	ITEM CODE	DESCRIPTION	PV	CV	PRICE EACH	TOTAL
1	10-P002-01	Core Wellness Pack	151.00	151.00	\$188.95	\$188.95

SubTotal: **\$188.95**

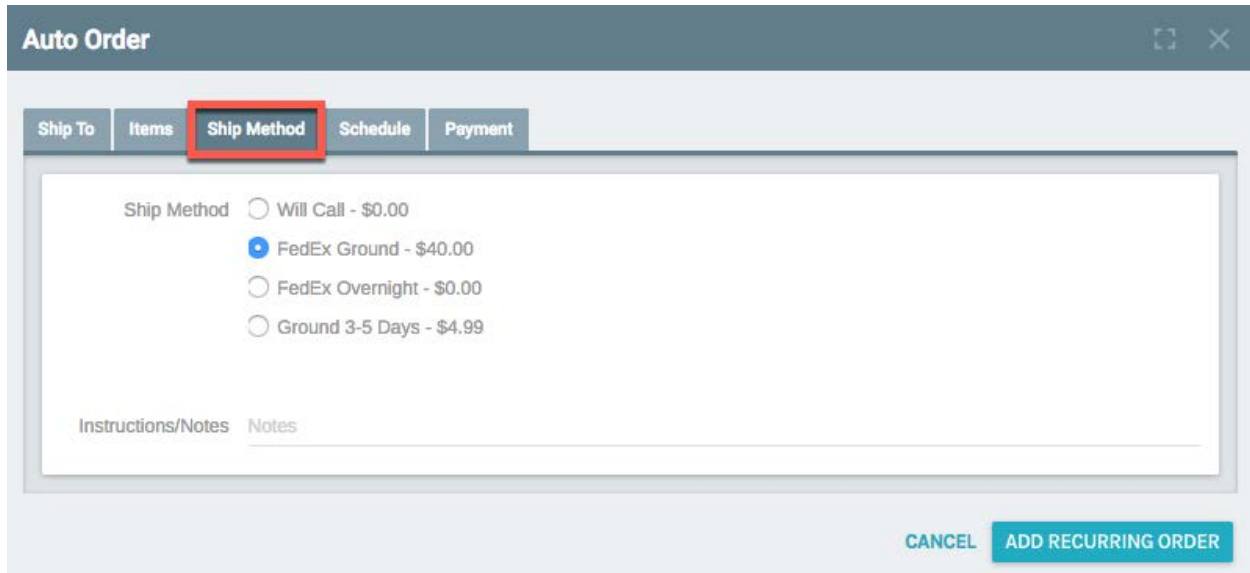
PV: \$151.00

CV: \$151.00

CANCEL
ADD RECURRING ORDER

SHIP METHOD TAB

Clicking on the Ship Method Tab will display the following window:

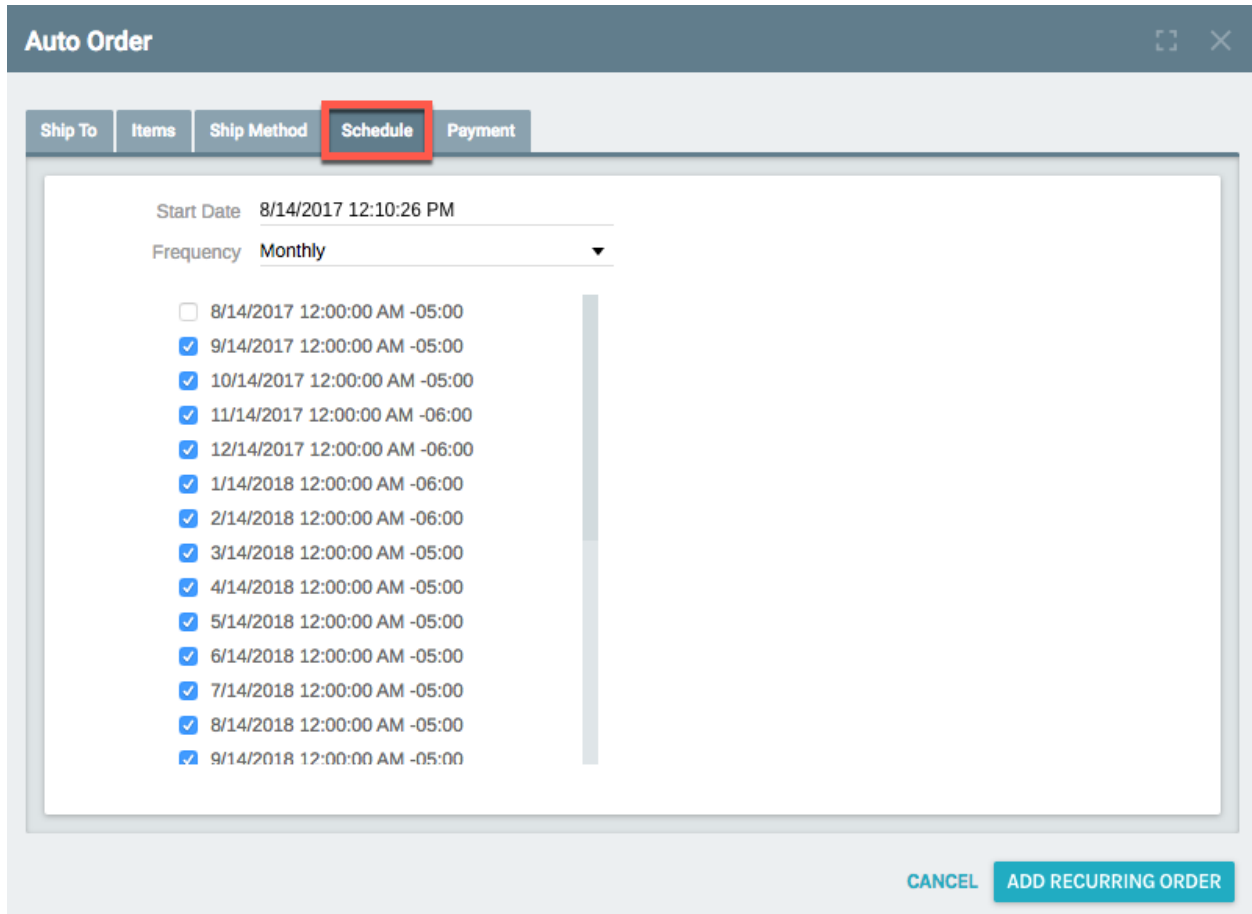


The screenshot shows a window titled "Auto Order" with a dark header bar. Below the header is a tabbed interface with five tabs: "Ship To", "Items", "Ship Method", "Schedule", and "Payment". The "Ship Method" tab is selected and highlighted with a red border. The content of the "Ship Method" tab includes a "Ship Method" label followed by four radio button options: "Will Call - \$0.00", "FedEx Ground - \$40.00", "FedEx Overnight - \$0.00", and "Ground 3-5 Days - \$4.99". Below these options is a text area for "Instructions/Notes" and "Notes". At the bottom right of the window are two buttons: "CANCEL" and "ADD RECURRING ORDER".

Choose the appropriate Ship Method and continue to the Schedule Tab.

SCHEDULE TAB

Clicking on the Schedule Tab will display the following window:



Auto Order

Ship To | Items | Ship Method | **Schedule** | Payment

Start Date 8/14/2017 12:10:26 PM

Frequency Monthly

- 8/14/2017 12:00:00 AM -05:00
- 9/14/2017 12:00:00 AM -05:00
- 10/14/2017 12:00:00 AM -05:00
- 11/14/2017 12:00:00 AM -06:00
- 12/14/2017 12:00:00 AM -06:00
- 1/14/2018 12:00:00 AM -06:00
- 2/14/2018 12:00:00 AM -06:00
- 3/14/2018 12:00:00 AM -05:00
- 4/14/2018 12:00:00 AM -05:00
- 5/14/2018 12:00:00 AM -05:00
- 6/14/2018 12:00:00 AM -05:00
- 7/14/2018 12:00:00 AM -05:00
- 8/14/2018 12:00:00 AM -05:00
- 9/14/2018 12:00:00 AM -05:00

CANCEL ADD RECURRING ORDER

From this screen, a Start Date for the Recurring Order must be entered. This can be today's date or a date in the future.

Frequency must then be selected. Some Companies only have one Frequency while others have multiple.

The schedule is then displayed based on the Frequency.

NOTE: If there is a need to skip a month, then uncheck the box next to the date to be skipped.

Proceed to the Payment Tab

PAYMENT TAB

Auto Order
⌵

Ship To
Items
Ship Method
Schedule
Payment

Customer will send payment
 Debit Checking Account
 Primary Credit Card on File
 Primary Wallet Account
 Secondary Credit Card on File
 Secondary Wallet Account

MANAGE CUSTOMER ACCOUNT

Last Modified 8/14/2017	FreeCreditItem _____
Created By leer	ExactorCalculate _____
Modified By leer	Date _____

SubTotal	\$188.95
Tax	\$17.74
Shipping	\$40.00
Total	\$246.69

CANCEL
ADD RECURRING ORDER

Choose the appropriate payment method from the list.

NOTE: Companies may allow different types of payment. The most common payment method is the Primary or Secondary Credit Card on File. If Credit Card is chosen as payment method, a Credit Card must be on file in the Customer Record. Cards may be added to the Customer Record using the "Manage Customer Account" button.

The bottom section of the screen shows the basic information about the Recurring Order: Who Created/Modified the Order, Totals, Tax, and Shipping.

If your company has User Defined Fields at the Order Level, they will be shown on the right. These are client specific, so will not be covered in this training.

Completing the Recurring Order

Once all tabs are complete, click on “Add Recurring Order”. This will complete the setup process of the Recurring Order Template.

To verify that the Recurring Order Template has been set up correctly, return to the Customer Record.

In the Recurring Order section, you should see a new Recurring Order as shown below.

Recurring Orders							
ID	LAST	NEXT	SUBTOTAL	FREQUENCY	PAY METHOD	CCN	
6	4/7/2017	5/7/2017	\$500.00	Monthly	Customer	----	VIEW
575		8/15/2017	\$188.95	Monthly	Customer	----	VIEW

[ADD NEW RECURRING ORDER](#)

Click on “View” to see the details of the Recurring Order.

This completes Recurring Order Setup.