



# Creating Recurring Orders

v 1.1

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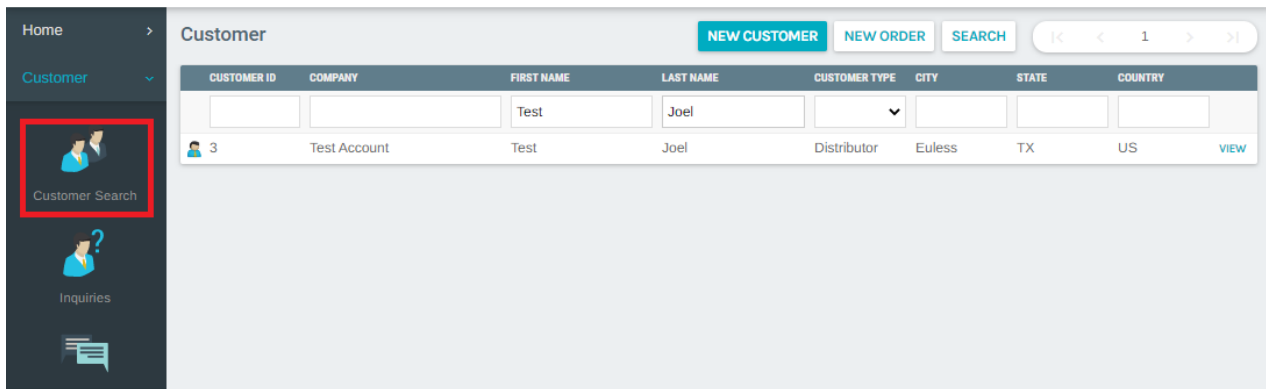
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## Recurring Orders

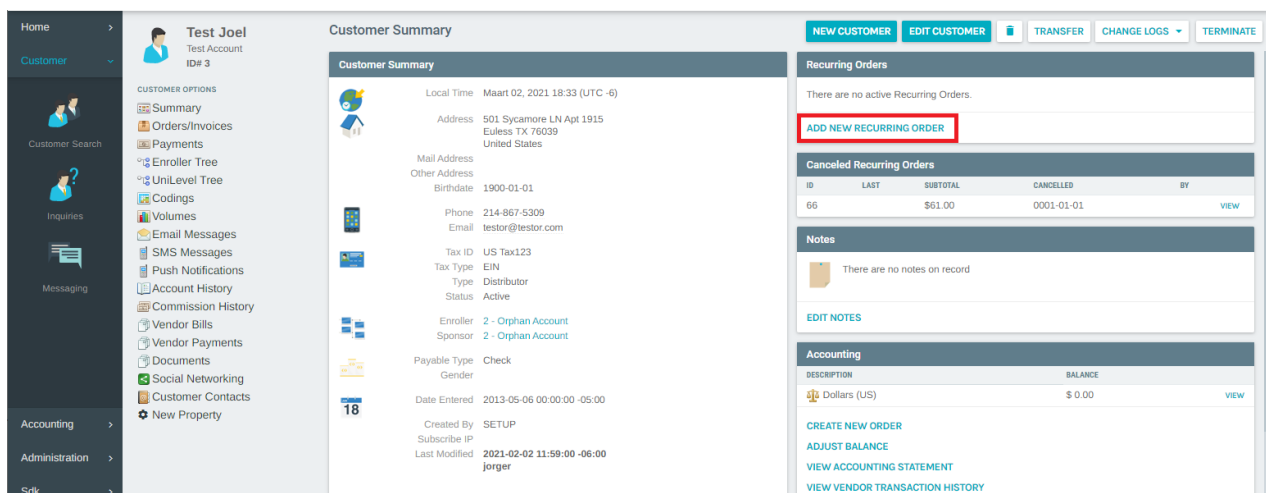
A recurring order can be defined as a template, and not as an order itself. This template will be used to generate an order for the same product or service depending on the frequency selected. Common frequencies are weekly, monthly, quarterly, or annual. Recurring orders are commonly referred to as an Autoship, Auto-order or a subscription. For most clients, a recurring order is required to enroll, achieve or maintain a rank, or to keep a subscription active.

## How to create a Recurring Order

Log in to Exigo.com and navigate to Customer > Customer Search. Next, search for the desired customer. For this exercise we will type as first name "Test" and Last name "Joel" and then simply click on the user record.



You will see the screen below displayed. In the upper right corner, click **ADD NEW RECURRING ORDER**.



The Auto Order screen will appear, which contains the Ship To, Items, Ship Method, Schedule, and Payment tabs. We will cover each tab in detail in the upcoming sections.

Auto Order

Ship To | Items | Ship Method | Schedule | Payment

Shipping Address  
 Test Joel  
 501 Sycamore LN Apt 1915  
 Euless TX 76039

Mailing Address  
 Test Joel

-1

Drop Ship Address

Country: United States

Company: Test Account

First Name: Test

Last Name: Joel

Address: 501 Sycamore LN Apt 1915

City: Euless Texas 76039

CHECK

Email: testor@testor.com  Auto Email Invoice

Phone: 214-867-5309  Personal Use

Process Type: Always Ship

CANCEL ADD RECURRING ORDER

## Recurring Order Details

**Ship To:** In this section three options available. The first two “Shipping Address” and “Mailing Address” display the information saved from the user profile and cannot be updated in this section. If you want to change these two options, then it can be modified at Customer Summary level. The third option, “Drop Ship Address”, can be updated in this tab. Once the Country, Company, First and Last name, Address are populated, the system will require you to click “Check” to validate the correct postal code.

Auto Order

Ship To | Items | Ship Method | Schedule | Payment

Shipping Address  
 Test Joel  
 501 Sycamore LN Apt 1915  
 Euless TX 76039

Mailing Address  
 Test Joel  
 20 W 34th St # NEW YORK NY 10001 UNITED STATES  
 New York NY 10118-0114

Drop Ship Address

Country: United States

Company: Test Account

First Name: Test

Last Name: Joel

Address: 501 Sycamore LN Apt 1915

City: Euless Texas 76039

CHECK

Email: testor@testor.com  Auto Email Invoice

Phone: 214-867-5309  Personal Use

Process Type: Always Ship

CANCEL ADD RECURRING ORDER

**Items:** The products for the order will be displayed in this section. To add a new Item, simply click **ADD ITEM**. On the following screen, enter the item code and click **SEARCH ITEMS**. Any products matching the item code or description will be listed. Click on the desired product, add the Quantity, and finally click **ADD ITEM**.

Auto Order #8

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

Warehouse: Default Warehouse  
Currency: Dollars (US)

**ADD ITEM** REMOVE ITEMS REMOVE ALL ITEMS

<input type="checkbox"/>	QTY	ITEM CODE	DESCRIPTION	BV	CV	PRICE EACH	TOTAL	
<input type="checkbox"/>	1	201	Enrollment Pack 1	0.00	\$ 0.00	\$ 0.00	\$ 0.00	EDIT

SubTotal: \$ 0.00

Manage Order Items

Found: 3 Items

Add Product | **Advanced**

Item Code: enrollment **SEARCH ITEMS**  
Enter item code or search string. Use Up and Down arrows to navigate through the results

ITEM CODE	DESCRIPTION	PRICE EACH
200	Distributor Enrollment Fee	\$ 0.00
201	Enrollment Pack 1	\$ 0.00
202	Enrollment Pack 2	\$ 0.00

CANCEL **ADD ITEM**

If you need to remove an existing item from the template, select the check box of the items to delete and click **REMOVE ITEMS**. You will be prompted to confirm the deletion. You may delete all items form the template by clicking on the button **REMOVE ALL ITEMS**.

**Ship Method:** In the Ship Method tab you can select the shipping method. These ship methods are configured by the client during market setup. Instruction/Notes should be filled out if any additional information is needed to ensure delivery of the package.

### Auto Order

Ship To
Items
Ship Method
Schedule
Payment

Ship Method

Express Shipping \$ 0.00

Ground Shipping \$ 0.00

Instructions/Notes The package will be received at the front door

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CANCEL
ADD RECURRING ORDER

**Schedule:** We can define the frequency of the recurring order and the start date. The most common frequency is Monthly. Within Exigo admin, your company can configure additional frequencies such as: Quarterly, Yearly and Bi-Monthly. Below the field "Frequency", a list of upcoming orders to be processed are listed. To skip an order, uncheck the box next to the date to skip.

### Auto Order

Ship To
Items
Ship Method
Schedule
Payment

Start Date 2021-03-03 00:00:00

Frequency Every 4 weeks ▼

<input checked="" type="checkbox"/>	2021-03-03 00:00:00
<input checked="" type="checkbox"/>	2021-03-31 00:00:00
<input checked="" type="checkbox"/>	2021-04-28 00:00:00
<input checked="" type="checkbox"/>	2021-05-26 00:00:00
<input checked="" type="checkbox"/>	2021-06-23 00:00:00
<input checked="" type="checkbox"/>	2021-07-21 00:00:00
<input checked="" type="checkbox"/>	2021-08-18 00:00:00
<input checked="" type="checkbox"/>	2021-09-15 00:00:00
<input checked="" type="checkbox"/>	2021-10-13 00:00:00
<input checked="" type="checkbox"/>	2021-11-10 00:00:00
<input checked="" type="checkbox"/>	2021-12-08 00:00:00
<input checked="" type="checkbox"/>	2022-01-05 00:00:00
<input checked="" type="checkbox"/>	2022-02-02 00:00:00
<input checked="" type="checkbox"/>	2022-03-02 00:00:00

CANCEL
ADD RECURRING ORDER

**Payment:** On the payment tab you can select the payment method to be used when paying for a recurring order. The default option is “Primary Credit Card on File”, but additional options are available as configured by your administrator. Once all tabs have been populated click **ADD RECURRING ORDER** to add this Recurring Order template.

**Auto Order**

Ship To | Items | Ship Method | Schedule | Payment

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

MANAGE CUSTOMER ACCOUNT

Last Modified: 2021-03-02 PromoField: \_\_\_\_\_

Modified By: jorger

Created By: jorger

SubTotal	\$ 0.00
Tax	\$ 0.00
Shipping	\$ 0.00
<b>Total</b>	<b>\$ 0.00</b>

CANCEL
**ADD RECURRING ORDER**

**NOTE:** The totals displayed on the auto-order, such as subtotal, shipping, tax, and grand total are subject to change as they are only updated when the auto order is processed, or it is edited via Exigo admin. This means that the auto order totals may be outdated if the order calculation rules or item prices have changed since the last time it was recalculated.

Orders generated by the Recurring Order will appear on the Customer screen under Orders/Invoices. The status is based on the payment method to be used.

1. **CCPending** - If the Payment method to be used is Primary or Secondary Credit Card on File, then the order will be saved with this status.
2. **ACHPending** - If the Payment method to be used is Debit Checking Account, then the order will be saved with this status.
3. **Pending** - If the Payment method to be used is Customer Will Send Payment, then the order will be saved with this status.
4. **Accepted** - If the Payment method to be used is Create Bank Draft, then the order will be saved with this status. You would then need to go to Accounting>>Banking and then print the bank draft that was created at the time the order was generated. Please note that this practice is no longer being used by most clients since they want the bank draft to clear first before the order is released for fulfillment. Most clients use the ACHPending feature instead.