



Editing Recurring Orders

v 1.1

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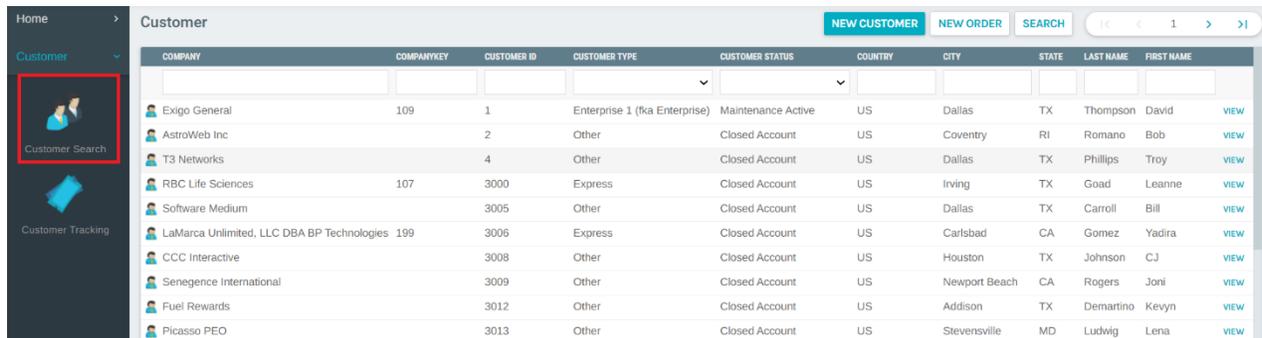
Recurring Orders

This training module focuses on modifying recurring orders. First let us briefly describe a Recurring Order, also known as: Auto Order or Auto Ship. 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. Many clients require customers to have at least one recurring order to enroll, earn commissions, or be part of a new rank group.

How to Search for a Recurring Order

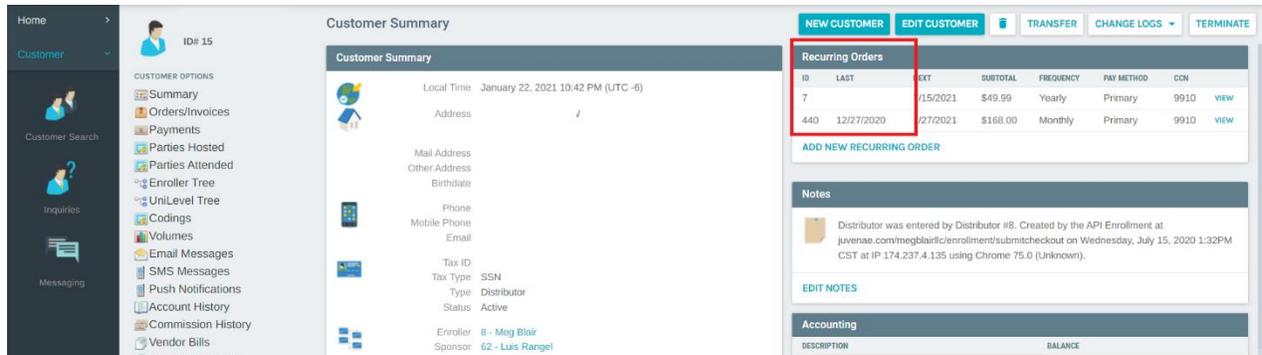
First, we need to log in to Exigo.com and navigate to Customer > Customer Search. This will display the following screen.

In this window type the name, customer id or other search criteria to locate the customer



COMPANY	COMPANYKEY	CUSTOMER ID	CUSTOMER TYPE	CUSTOMER STATUS	COUNTRY	CITY	STATE	LAST NAME	FIRST NAME
Exigo General	109	1	Enterprise 1 (fka Enterprise)	Maintenance Active	US	Dallas	TX	Thompson	David
AstroWeb Inc		2	Other	Closed Account	US	Coventry	RI	Romano	Bob
T3 Networks		4	Other	Closed Account	US	Dallas	TX	Phillips	Troy
RBC Life Sciences	107	3000	Express	Closed Account	US	Irving	TX	Goad	Leanne
Software Medium		3005	Other	Closed Account	US	Dallas	TX	Carroll	Bill
LaMarca Unlimited, LLC DBA BP Technologies	199	3006	Express	Closed Account	US	Carlsbad	CA	Gomez	Yadira
CCC Interactive		3008	Other	Closed Account	US	Houston	TX	Johnson	CJ
Senegence International		3009	Other	Closed Account	US	Newport Beach	CA	Rogers	Joni
Fuel Rewards		3012	Other	Closed Account	US	Addison	TX	Demartino	Keilyn
Picasso PEO		3013	Other	Closed Account	US	Stevensville	MD	Ludwig	Lena

Once you have located the customer, click on the username and the screen below will be displayed. You can view this customer's recurring orders in the upper right section.



ID	LAST	EXT	SUBTOTAL	FREQUENCY	PAY METHOD	CCN
7		15/2021	\$49.99	Yearly	Primary	9910
440	12/27/2020	27/2021	\$168.00	Monthly	Primary	9910

Click on the order that you want to modify. To modify this recurring order, click **EDIT RECURRING ORDER**.

Recurring Order #440

EDIT RECURRING ORDER CREATE ORDER HISTORY LISTING EMAIL

Invoice Details

.. [Printer Icon] [Close Icon]

To		Info		
Company Name				
Customer Name				
Address				
CityStateZip				
ItemID	Description	Quantity	Price	Total
c0001	Product 123	1	\$33.00	\$33.00
c0002	Product XYZ	1	\$135.00	\$135.00
			Subtotal	\$168.00
			Taxes	\$13.86
			Shipping	\$6.99
			Total	\$188.85

Recurring Order Details

In the recurring order screen, you can view or edit shipping information, items or products, shipping method, the frequency and the start date, and the payment information.

Each tab is broken out in more detail below:

Ship To: In this section you select the address to ship product to. Shipping Address and Mailing Address are pulled from the user profile and cannot be updated in this section. To change either of these two addresses, this needs to be modified at Customer Summary level. The third option, Drop Ship Address, allows for a different address to be entered. Once this shipping information is entered, the system will require you to click “Check” to validate the correct postal code. You may also enter the email, Phone and Process Type (Always Ship and Backup AutoOrder).

Auto Order #8

Ship To Items Ship Method Schedule Payment

Shipping Address
JL-test
9130 John W. Carpenter Freeway
Dallas TX 75247

Mailing Address
JL-test
8130 John W Carpenter Fwy
Dallas TX 75247-4721

Drop Ship Address

Country

Company

First Name

Last Name

Address

City

Email Auto Email Invoice

Phone Personal Use

Process Type

Items: The products for the order will be displayed in this section. If you want to add a new Item, simply click “ADD ITEM”, enter the item code and click “SEARCH ITEMS”. You will see the products that match the item code listed. Click on the product to add the Quantity and to save 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**

To remove an existing item from the list, select the check box to the left of the item to be deleted and click “REMOVE ITEMS. You will be prompted to confirm if you are sure you want to delete the item. There is another option to delete all items form the order, simply click on the button “REMOVE ALL ITEMS”

Ship Method: In this 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 #66

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

Ship Method Express Shipping \$0.00
 Ground Shipping \$0.00

Instructions/Notes Leave the package at the front door.

CANCEL **SAVE CHANGES**

Schedule: In this tab, you can define the frequency of the recurring order and the start date. Frequency options are defined by the client. Below Frequency, the orders associated with this this recurring order template are shown. If a customer wishes to skip an order, uncheck the box next to the desired date.

Auto Order #59707

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

Start Date 11/1/2018 12:00:00 AM
 Frequency Yearly

11/1/2008 12:00:00 AM
 11/1/2009 12:00:00 AM
 11/1/2010 12:00:00 AM
 11/1/2013 12:00:00 AM
 11/1/2014 12:00:00 AM
 11/1/2015 12:00:00 AM
 11/1/2016 12:00:00 AM
 11/1/2017 12:00:00 AM
 11/1/2018 12:00:00 AM
 11/1/2019 12:00:00 AM
 11/1/2020 12:00:00 AM
 11/1/2021 12:00:00 AM
 11/1/2022 12:00:00 AM
 11/1/2023 12:00:00 AM

To disable a certain date, simply uncheck it.
 If you change the Frequency or Start Date, it will reset the schedule and re-enable any dates you may have deselected.

Bill Period Offset
 Use this if you are billing for a service that involves a period. For example if you wish to bill 10 days prior to the month that the service is to be rendered, you would set the Start Date to the 20th and the Period Start date to the 1st of the following month.

Offset Period

Payment: In this tab the payment method is defined. These payment methods are configured at the customer level. To modify stored payment methods, simple click on MANAGE CUSTOMER ACCOUNT and navigate to the Payment Info tab. Once you have updated your payment info, click Save Changes. Be sure to select the payment method on the screen below and Click Save changes to complete the process.

Auto Order #59707

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 11/1/2020 Shipment On Hold

Modified By AROProcess

Created By daryl

SubTotal	\$35.00
Tax	\$0.00
Shipping	\$0.00
Total	\$35.00

CANCEL **SAVE CHANGES**