

Order Management How to Transfer Old Volume

v 1.0



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How to Transfer Volume on an Order

Exigo has the ability to Transfer Volume at the Order Level from one Sponsor to another. This document will review this process.

First, locate the Order for which you wish to transfer volume. Search by Order ID by navigating to Customer > Customer Search > Search.

Home >	Customer					NEW CUSTOMER	NEW ORDER SEARCH	1	5 - 51
Customer -	CUSTOMEN ID	COMPANY	FIRST NAME	LAST NAME	CUSTOMER TYPE	anv	STATE	COUNTRY	
·						•			
	R 1	Master Account	Master	Account	Distributor	2121	AA.	US	WEW
Contractor Contractor	2 2	Orphan	Orphan	Account	Retail Customer			US	VIEW
Cardinate Constant	£ 3	Test Account	Test New	Account	Distributor	Costa Mesa	GA	US	VIEW
_?	£ 4	Terminated Account	Terminated	Account	Distributor			üs	VIEW
P	2 5	Company	Company	Account	Distributor		AA	us	WEW
loquities	2 10		Lee	Rowell	Distributor	Costa Mesa	CA	US	VEW
-	2 11	AUTO-GENERATED	TEST_1_RetailCustomer	_50	Distributor	Dallas	тх	US	VIEW
	L 12	AUTO-GENERATED	TEST_1_RecallCustomer	_50_AS	Distributor	Dallas	TX	US	VIEW
Mensaging	E 13	AUTO-GENERATED	TEST_2_Preferred_50		Preferred Customer	Dallas	TX	US	VIEW

Clicking on "Search" will display the following window:

Home >	Customer			Search			NEW CUSTOMER	NEW ORDER SEA	ясн	> >1
	CUITIMEN O	COMPANY	PRETAINE	Jearch		100 B	OTY	STATE	COUNTRY	
				Find			•			
4	E 1	Master Account	Master	in	Company		2121	AA	us	VIEW
	<u>a</u> z	Orphan	Orphan			- ner			US	TEW
Cuttomer Search	23	Test Account	Test New		Туре		Costa Mesa	CA	us	vitiw
_?	2.4	Terminated Account.	Terminated		City				us	SIL
e 🖉	g 5	Company	Company		State			AA	us	VIEW
	2 10		Lee		Country	×	Costa Mena	CA	US	VIEW
100	g u	AUTO-GENERATED	TEST_1_RetailC	customer_50	Address	×	Dates	TX	US	VIEW
	2 12	AUTO-GENERATED	TEST_1_RetailC	austomer_50	Tanalaing blumbas	×	Daflas	TX	US	VIIW
	£ 13	AUTO-GENERATED	TEST_2_Protect	ed_50	Tracking Number	1 Custor	wer Duillan	TX	US	ARM
	g 14	AUTO-GENERATED	TEST_2_Preferm	ed_50_A5	Order ID		Quilles	TX	us	VIEW
	g 15	AUTO-GENERATED	TEST_3_Datable	nor_50	Auto Order ID	*	Dallas	TX	US	VIEW
	£ 10	AUTO-GENERATED	TEST_3_Depres	101_50_AS	Customer Status	*	Durian	XT.	US	VIDW
	g 17	AUTO-GENERATED	TEST_1_RetailC	ustomer_50	Rank	istomer.	Dallas	TX	US.	VIEW
	£ 18	AUTO-GENERATED	TEST_1_Retail	ustomer_50	AS	Retail Customer.	Dallas	TX	us	WIRW -

To Search for an Order ID, first click on the drop down for the "In" field and choose "OrderID".

Populate the "Find" field with the OrderID.

Click "Search"



The following window will be displayed for the Order:

er Number 87594 Printed				
T ORDER RMA CHANGE STATUS - COMMISSIONS HISTORY				
Details				
oice 1 🔻 🚊 📖 🥵 🚉 🔂				
: Ground 3-5 Days	8	87594		
To Order Info				
Lee Rowell 130 McCormick Ave Costa Mesa, CA 92626-3316 Costa Mesa, CA 92626-3316 Costa Mesa, CA 92626-3316 Costa Mesa, CA 92626-3316 Customer Name: Lee Rowell Sales Tax ID: Date: 8/16/2017 8:59:46 A Email: leer@exigo.com Phone: 4698654984 Created By: leer Fulfilled By:	M -05:00			
Payment Info				
Payment Date: 8/16/2017 9:00:27 AM -05:00 Payment Method: Cash Payment Amount: \$53.80 Payee Name				
Quantity ItemID Description	Price	Total		
1 10-S002- MentaFocus 01	\$44.95	\$44.95		
	Subtotal:	\$44.95		
			С	



Click on "Edit Order". The following window will be displayed:

er Detail #8759	A Method Roumont			::
DD PAYMENT	Payment		ACCOUNT SHIPPING	TAX CHANGE STATU
ТҮРЕ	ACCOUNT			AMOUNT
🖭 Cash				\$53.80 EDIT DELET
SubTotal	\$44.95	Order Status	Printed	
Tax	\$3.48	Order Type	Customer Service	
Shipping	\$4.99	Order Date	8/16/2017 8:59:46 AM	-
Total	\$53.80	Last Modified	8/16/2017 9:30:00 AM -05:00	
FreeCreditItem		Modified By	API - API IntegraCore	
Freeoredittem		Created By	leer	
ExactorCalculate Date 64926662-22f4-4ad4-944b-e921d4fb5676			Supress packing slip price Do not display the price on the invoice	
			SCommissionable	
Transfer Order Volu	ume To Customer ID		Do not ship The invoice will be created manually	

Click on the "Payment Tab".

Populate the "Transfer Order Volume to Customer ID" with the Customer ID of the person to whom the volume from this Order should be transferred.

Click "Save Changes".