



Order Management How to Transfer Old Volume

v 1.0

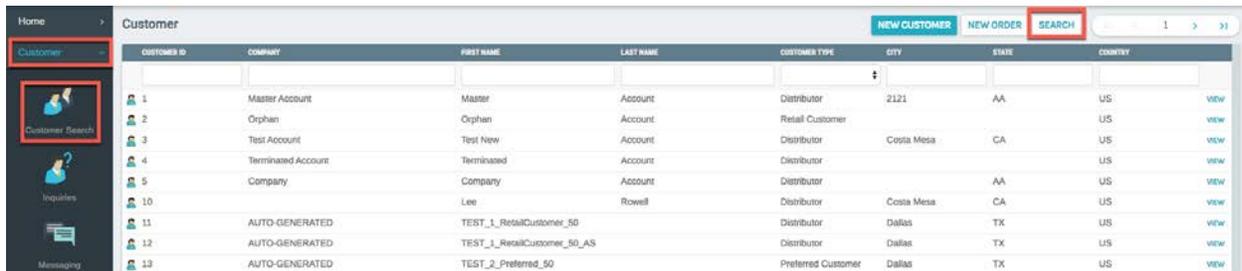
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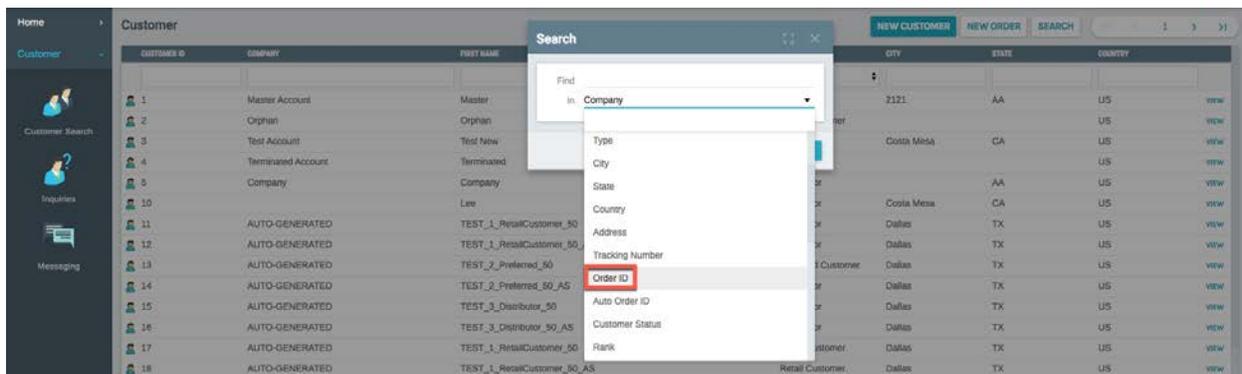
How to Transfer Volume on an Order

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.



Clicking on "Search" will display the following window:



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:

Order Number 87594 Printed
⌵ ×

EDIT ORDER

RMA

CHANGE STATUS ▾

COMMISSIONS

HISTORY

Invoice

Details

Invoice 1 ▾
🖨️
🚚
📦
📦
📄
📄

87594

: Ground 3-5 Days

To	Order Info
Lee Rowell 130 McCormick Ave Costa Mesa, CA 92626-3316	Order No.: 87594 Order Type: Customer Service Shipping Method: Ground 3-5 Days Customer ID: 10 Customer Name: Lee Rowell Sales Tax ID: Date: 8/16/2017 8:59:46 AM -05:00 Email: leer@exigo.com Phone: 4698654984 Created By: leer Fulfilled By:

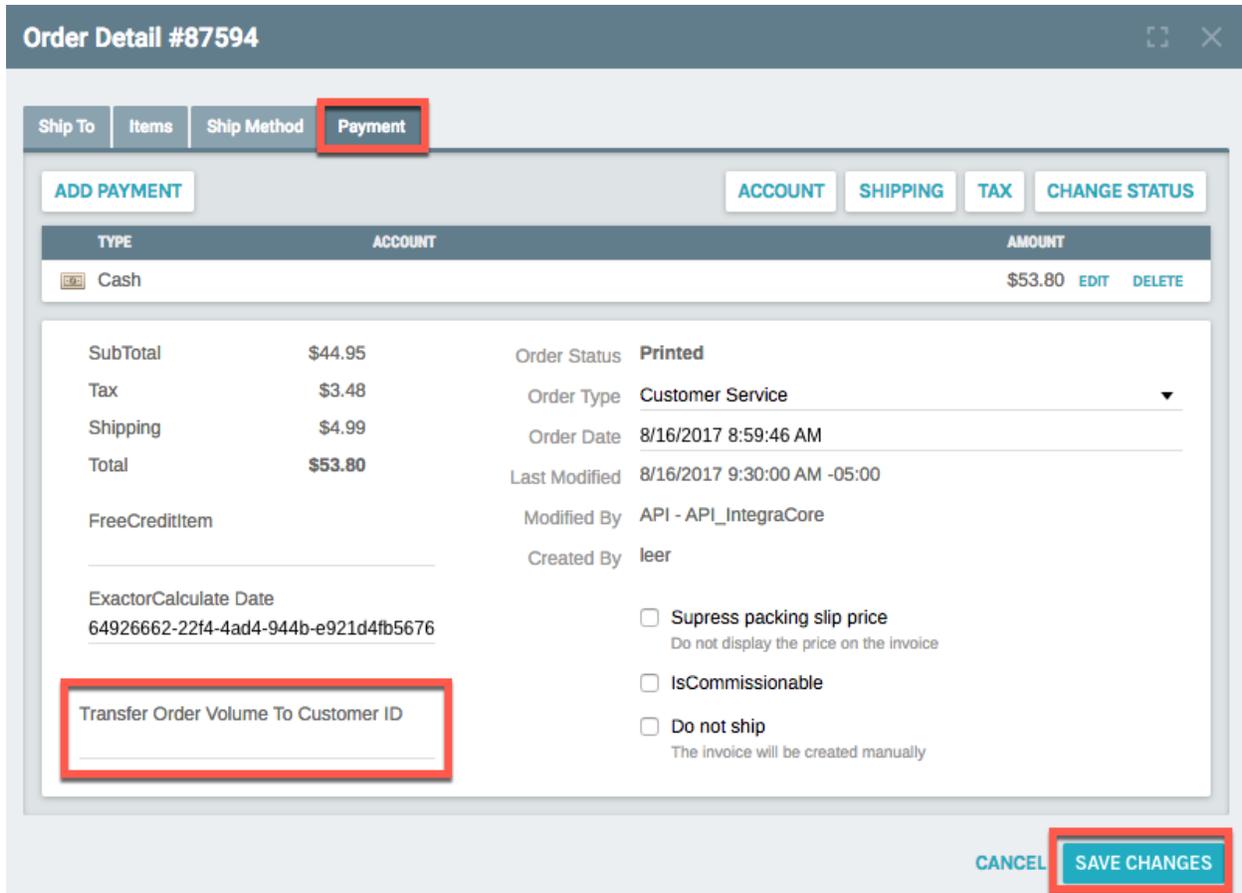
Payment Info

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-S002-01	MentaFocus	\$44.95	\$44.95
Subtotal:				\$44.95

CLOSE

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



The screenshot shows the "Order Detail #87594" window. The "Payment" tab is selected and highlighted with a red box. Below the tabs, there are buttons for "ADD PAYMENT", "ACCOUNT", "SHIPPING", "TAX", and "CHANGE STATUS". A table lists payment methods, with "Cash" selected and highlighted by a red box. The table has columns for TYPE, ACCOUNT, and AMOUNT. Below the table, there are order details including SubTotal (\$44.95), Tax (\$3.48), Shipping (\$4.99), and Total (\$53.80). Other details include Order Status (Printed), Order Type (Customer Service), Order Date (8/16/2017 8:59:46 AM), Last Modified (8/16/2017 9:30:00 AM -05:00), Modified By (API - API_IntegraCore), and Created By (leer). There are also checkboxes for "Supress packing slip price", "IsCommissionable", and "Do not ship". The "Transfer Order Volume To Customer ID" field is highlighted with a red box. At the bottom right, there are "CANCEL" and "SAVE CHANGES" buttons, with "SAVE CHANGES" highlighted by a red box.

TYPE	ACCOUNT	AMOUNT
Cash		\$53.80

SubTotal: \$44.95
Tax: \$3.48
Shipping: \$4.99
Total: \$53.80

Order Status: Printed
Order Type: Customer Service
Order Date: 8/16/2017 8:59:46 AM
Last Modified: 8/16/2017 9:30:00 AM -05:00
Modified By: API - API_IntegraCore
Created By: leer

FreeCreditItem: _____

ExactorCalculate Date: 64926662-22f4-4ad4-944b-e921d4fb5676

Transfer Order Volume To Customer ID: _____

Supress packing slip price
Do not display the price on the invoice

IsCommissionable

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".