



Item Management

v 1.1

Contents

Item Management.....	2
What is an Item	2
How Items Connect to Other Components in Exigo.....	3
How to Create New Items	4
Step 1.....	4
Step 2 General Tab	4
Step 3 Warehouse Tab	6
Step 4 Pricing.....	7
Step 5 Availability	8
Step 6 Taxation	9
What is a Kit	10
How to Create Static Kits.....	11
Step 1 General Tab	11
Step 2 Bill of Materials.....	12
How to Create Dynamic Kits.....	13
Kit Categories.....	13
Step 1 General Tab	14
Step 2 Bill of Materials Tab.....	15

Item Management

Proper Item Management in Exigo is critical for accurate processing and reporting throughout the system – including Commissions. This training module will focus on the following:

- What is an Item
- How Items Connect to Other Components in Exigo
- How to Create New Items
- How to Create Static Kits
- How to Create Dynamic Kits

NOTE: This is Level 1 training and will cover the basics for Item Management. Levels 2 and above will cover additional details on Items.

What is an Item

Items in Exigo are the core building blocks of all other processes. Items in Exigo are commonly defined as products. These Items may be standalone products or may be a grouping of products to be sold together. Items may be physical or virtual. Physical Items are shipped from Warehouses to the end Customer. Virtual Items are not shipped from Warehouses. Virtual Items may include Items purchased at an event, Items that are downloadable, Items that give the Distributors access to their Web Site and Mobile App, etc.

Availability, Pricing, Taxation, and Volumes are defined at the Item Level. Each of these terms are defined below. We will build on these terms as we move through the training modules.

Availability: Where the Item can be sold. This may be defined at the State, Region, or Country level.

Pricing: How much the Item costs. This may be defined by multiple Price Types which may include Retail Price, Preferred Price, and Wholesale Price. Exigo also has the ability to define Price for multiple currencies.

Taxation: Where the Item is taxed. This may be defined at the State, Region, or Country level.

Volumes: The two most common volume types are Business Volume (BV) and Commissionable Volume (CV). Each type of volume may drive multiple processes throughout the system. Most commonly, Business Volume which may also be referred to as Qualification Volume (QV) drives advancement in Ranks. Commissionable Volume most commonly drives Bonuses and standard Commissions Payout.

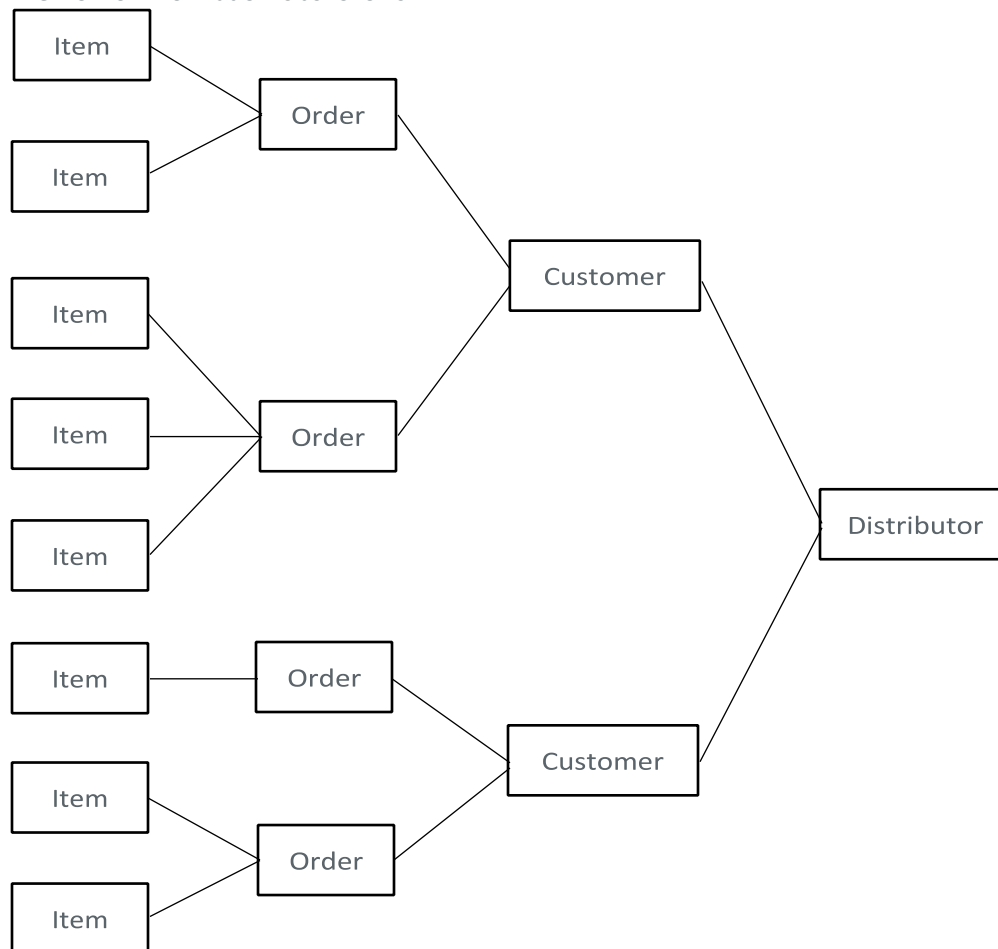
How Items Connect to Other Components in Exigo

For the purposes of this training module, we will focus on two Components in Exigo: The Order Calculation Engine and the Commissions Engine. A brief explanation of each is given below.

Order Calculation Engine: At its basic level, the Order Calculation Engine drives the calculation and placement of Orders. The engine calculates Order Price, Taxation, Volume, and Shipping. Calculation of the correct Order Total is dependent upon proper Item setup. Each Item feeds the Order Calculation Engine a Price, Tax on Price, Ship on Price, BV, and CV. Based on predefined rules, the Order Calculation Engine will then calculate the Order Total based on the input of the Items in the Order.

Commissions Engine: The Commissions Engine takes information calculated on Orders by the Order Calculation Engine and determines Rank Advancement, Bonuses, and Commissions. The Commissions Engine will be discussed in detail in a later module.

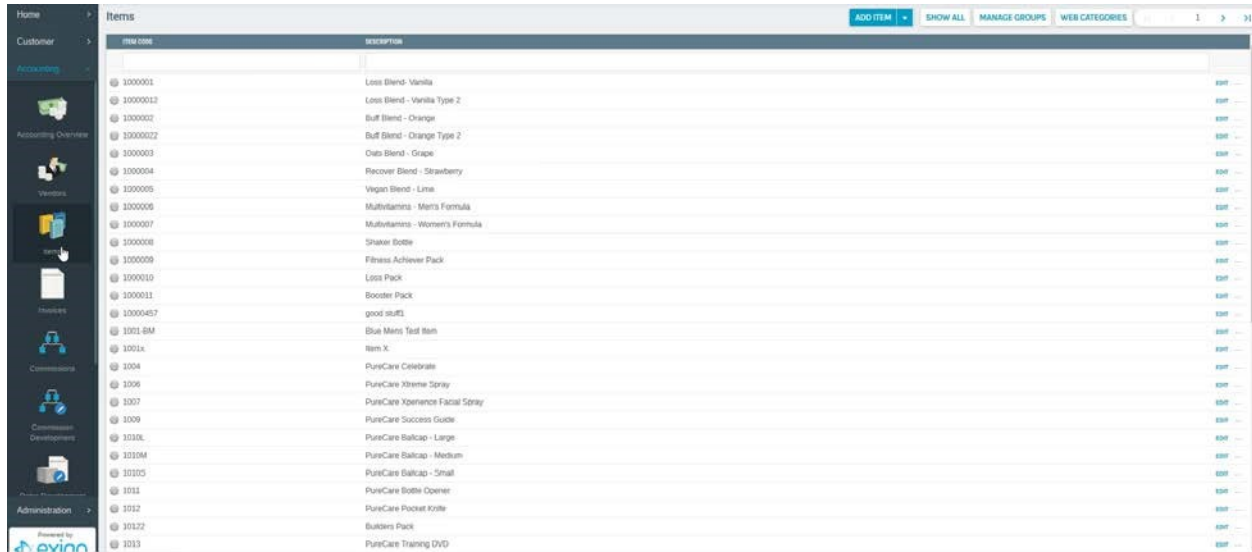
The Flow of information is as follows:



How to Create New Items

STEP 1

Sign in to Exigo.com and navigate to Accounting > Items.



STEP 2 GENERAL TAB

Click the "ADD ITEM" button. The following screen will open.

Add Product

General
Warehouse
Pricing
Availability
Taxation
Bill of Materials
Subs/Points
Kit Categories

Description

Item Code Weight

Notes

Available in all Countries / Regions

Taxable in all Countries / Regions

Allow for Recurring Order

Allow Partial Amounts

Print BOM on Invoice

Hide from Search

Virtual Item

Item Type Standard

User-defined Settings

Triggers when order is accepted:

Advance Subscription(s) (detail under Subs tab)

Increment Point Account(s) (detail under Points tab)

Create Payment Card -- Not Selected--

Create Gift Card

Upgrade Customer Type Retail Customer

Create Recurring Order Weekly

Stop Increment

CANCEL
SAVE CHANGES

Description: (Required) The name of the Item (i.e. Nutritional Shake).

Item Code: (Required) This is an alphanumeric field. Some clients refer to this as the SKU.

Weight: This field is required if calculating shipping by weight. This is the weight of the Item.

Notes: This field is commonly used to add notes about the Item for CSRs. Does not show on the Web.

Available in all Countries/Regions: (Availability) This box must be checked if the Item is available in all States, Regions, Countries. If this box is NOT checked, the Availability Tab must be filled out.

Taxable in all Countries/Regions: (Taxation) This box must be checked if the Item will be taxed in all States, Regions, Countries. If this box is NOT checked, the Taxation Tab must be filled out.

Allow for Recurring Order: This box must be checked if the Item can be included in a Recurring Order (i.e. Monthly Automatic Orders).

Allow Partial Amounts: Checking this box will allow the sale of partial Items (i.e. 4 pieces of a 6 piece Item). Clients sometimes use this to sale returned Items.

Print BOM on Invoice: This will be reviewed in the Dynamic Kits training.

Hide from Search: Checking this box will remove the Item from search in Exigo.com.

Virtual Item: This box is commonly used to note that an Item does not require shipping.

Item Type: Standard should always be used for Items not included in a Kit.

Advance Subscription: This will be reviewed in the Subscription training.

Increment Point Account: This will be reviewed in the Point Account training.

Create Payment Card: If this box is checked, the system will automatically create a Payment Card (i.e. Hyperwallet) for the Customer when this Item is purchased.

Create Gift Card: If this box is checked, the system will automatically create a Gift Card for the Customer when this Item is purchased.

Upgrade Customer Type: If this box is checked, the system will automatically upgrade the Customer to a higher level (i.e. Preferred Customer) when this item is purchased.

Create Recurring Order: If this box is checked, the system will automatically create a recurring Order when this Item is purchased (i.e. Monthly Shipment of the Item).

Stop Increment: This will be reviewed in Auto Order training.

STEP 3 WAREHOUSE TAB

Clicking on the Warehouse Tab will open the following window:

Add Product

General

Warehouse

Pricing

Availability

Taxation

Bill of Materials

Subs/Points

Kit Categories

Available in all Warehouses

WAREHOUSE	MANAGED BY	MAX QUANTITY ON ORDER
<input checked="" type="checkbox"/> US Warehouse	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> MX Warehouse	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> Hong Kong - China Capsule	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> CA Warehouse	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> AS Australia	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> CN China	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> EC Western Europe	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> EE Eastern Europe	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> HK Hong Kong	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> HU Hungary	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> ID Indonesia	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> IN India	Not Managed	▼ Max Quantity on Order
<input checked="" type="checkbox"/> IS Israel	Not Managed	▼ Max Quantity on Order

CANCEL
SAVE CHANGES

If the Item is available for Sale, then the warehouse(s) from which the Item is sold must be checked. For example, if you would like to Order the Item from CENI Colima, then CENI Colima must be checked on the Item. If no Warehouse is chosen, the Item will not be shown as Available for purchase. If Virtual Items are being sold, a Virtual Warehouse can be set up so that the Items show as available for purchase. Note for future training modules that Warehouses are required at the Item, Order, and Customer Levels.

Managed By: Exigo does not manage inventory. This field can be set to Not Managed.

Max Qty on Order: This field notes how many units of this Item may be purchased on 1 Order.

STEP 4 PRICING

Clicking on the Pricing Tab opens the following window:

Add Product

General

Warehouse

Pricing

Availability

Taxation

Bill of Materials

Subs/Points

Kit Categories

Currency Dollars (US) ▼ EXTENDED PRICING

	PRICE	TAX ON PRICE	SHIP ON PRICE	BV	CV
💰 Retail	0	0	0	0	0
💰 Preferred	0	0	0	0	0
💰 Wholesale	0	0	0	0	0

CANCEL
SAVE CHANGES

The proper completion of this screen is critical. It is the client’s responsibility to provide the values for these fields.

Currency: Each Item may be sold in multiple currencies. This screen must be completed for each currency. The Currency is chosen from the dropdown list.

Extended Pricing: This will be covered in future training modules.

Price: This field controls the Pricing of the Item at multiple levels.

TOP (Tax on Price): This field controls the Price used to calculate Taxation. Note that this is not the Tax Amount in this field, rather the Price the system will use to calculate tax. This Price does not always match the value in the Price field.

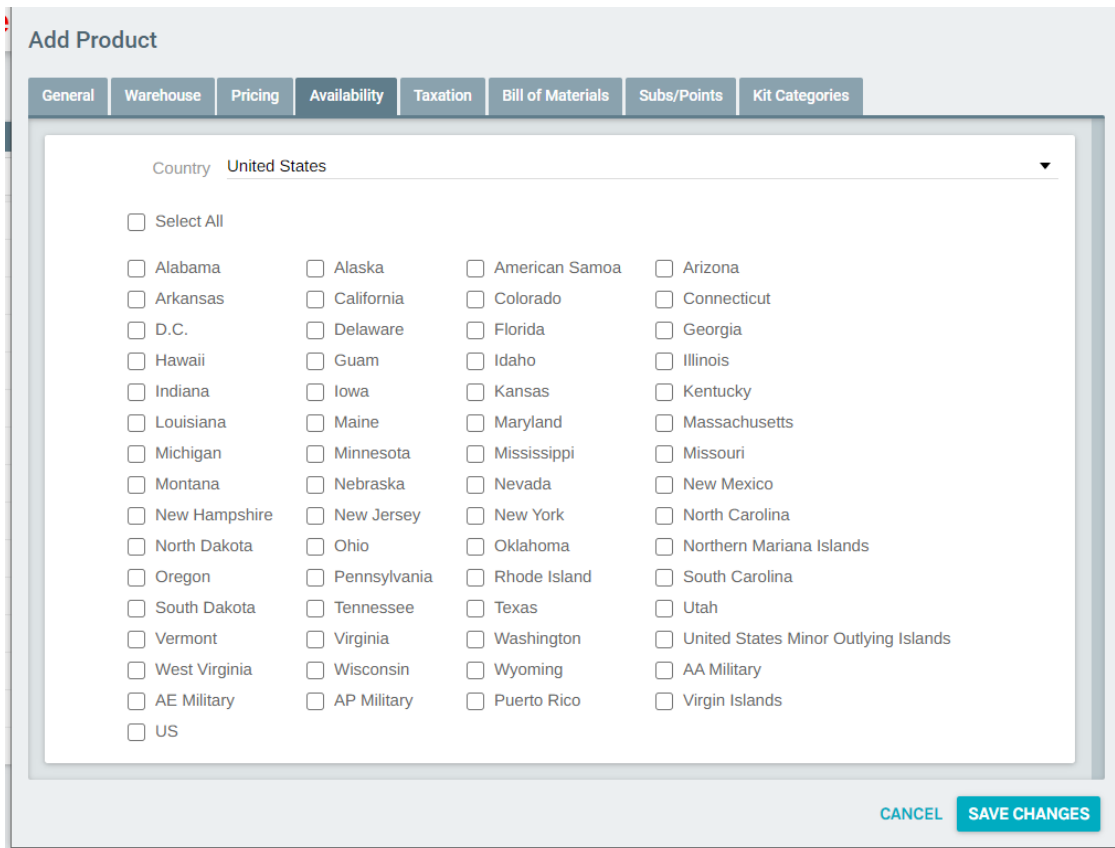
SOP (Ship On Price): If shipping is calculated by Price, this field will control the shipping calculation. Note that this is not the Shipping Price in this field, rather the Price the system will use to calculate shipping. This Price does not always match the value in the Price field.

QV/BV (Qualification Volume/Business Volume): This field affects the Volume calculations at the Order Level. This volume is commonly used for Rank Qualification.

CV (Commissionable Volume): This field affects the Volume calculations at the Order Level. This volume is commonly used for Bonus Qualification and Commissions.

STEP 5 AVAILABILITY

If “Available in All Countries/Regions” was not checked on the General Page, then this page must be completed.



Add Product

General Warehouse Pricing **Availability** Taxation Bill of Materials Subs/Points Kit Categories

Country **United States**

Select All

<input type="checkbox"/> Alabama	<input type="checkbox"/> Alaska	<input type="checkbox"/> American Samoa	<input type="checkbox"/> Arizona
<input type="checkbox"/> Arkansas	<input type="checkbox"/> California	<input type="checkbox"/> Colorado	<input type="checkbox"/> Connecticut
<input type="checkbox"/> D.C.	<input type="checkbox"/> Delaware	<input type="checkbox"/> Florida	<input type="checkbox"/> Georgia
<input type="checkbox"/> Hawaii	<input type="checkbox"/> Guam	<input type="checkbox"/> Idaho	<input type="checkbox"/> Illinois
<input type="checkbox"/> Indiana	<input type="checkbox"/> Iowa	<input type="checkbox"/> Kansas	<input type="checkbox"/> Kentucky
<input type="checkbox"/> Louisiana	<input type="checkbox"/> Maine	<input type="checkbox"/> Maryland	<input type="checkbox"/> Massachusetts
<input type="checkbox"/> Michigan	<input type="checkbox"/> Minnesota	<input type="checkbox"/> Mississippi	<input type="checkbox"/> Missouri
<input type="checkbox"/> Montana	<input type="checkbox"/> Nebraska	<input type="checkbox"/> Nevada	<input type="checkbox"/> New Mexico
<input type="checkbox"/> New Hampshire	<input type="checkbox"/> New Jersey	<input type="checkbox"/> New York	<input type="checkbox"/> North Carolina
<input type="checkbox"/> North Dakota	<input type="checkbox"/> Ohio	<input type="checkbox"/> Oklahoma	<input type="checkbox"/> Northern Mariana Islands
<input type="checkbox"/> Oregon	<input type="checkbox"/> Pennsylvania	<input type="checkbox"/> Rhode Island	<input type="checkbox"/> South Carolina
<input type="checkbox"/> South Dakota	<input type="checkbox"/> Tennessee	<input type="checkbox"/> Texas	<input type="checkbox"/> Utah
<input type="checkbox"/> Vermont	<input type="checkbox"/> Virginia	<input type="checkbox"/> Washington	<input type="checkbox"/> United States Minor Outlying Islands
<input type="checkbox"/> West Virginia	<input type="checkbox"/> Wisconsin	<input type="checkbox"/> Wyoming	<input type="checkbox"/> AA Military
<input type="checkbox"/> AE Military	<input type="checkbox"/> AP Military	<input type="checkbox"/> Puerto Rico	<input type="checkbox"/> Virgin Islands
<input type="checkbox"/> US			

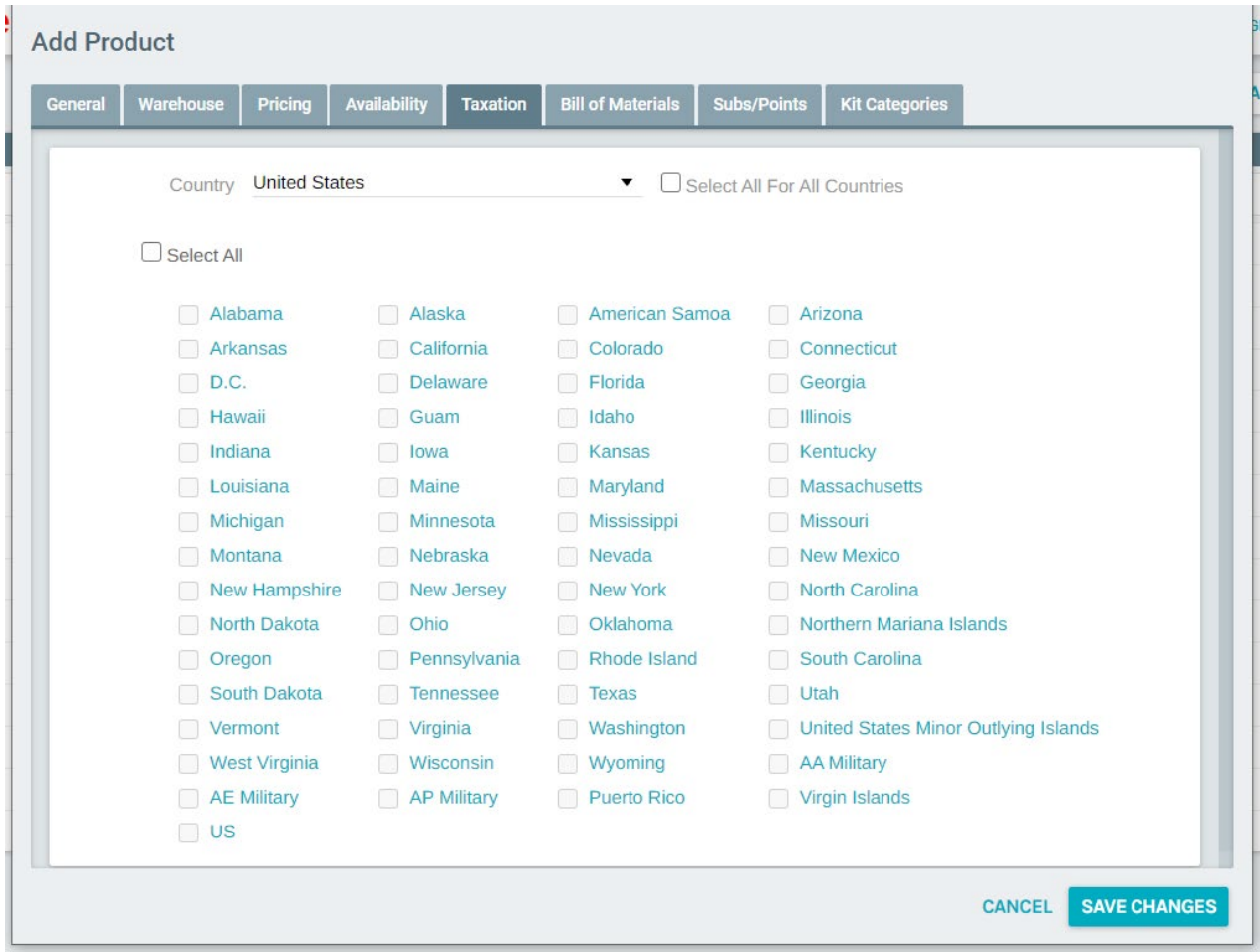
CANCEL **SAVE CHANGES**

The system compares the Customer’s Country/State with the Country/State from this page. Based on the page above, if the Customer is from the United States, then they cannot purchase this item.

Countries: The appropriate Country should be pulled from the dropdown list. This will display the States within that that Country. If Select All is chosen, this Item will be available to all US States. If Select All is not chosen, the States where the Item is available for purchase should be chosen. NOTE: This must be done for each Country where the Client operates.

STEP 6 TAXATION

If “Taxable in All Countries/Regions” was not checked on the General Page, then this page must be completed.



Add Product

General Warehouse Pricing Availability **Taxation** Bill of Materials Subs/Points Kit Categories

Country United States Select All For All Countries

Select All

<input type="checkbox"/> Alabama	<input type="checkbox"/> Alaska	<input type="checkbox"/> American Samoa	<input type="checkbox"/> Arizona
<input type="checkbox"/> Arkansas	<input type="checkbox"/> California	<input type="checkbox"/> Colorado	<input type="checkbox"/> Connecticut
<input type="checkbox"/> D.C.	<input type="checkbox"/> Delaware	<input type="checkbox"/> Florida	<input type="checkbox"/> Georgia
<input type="checkbox"/> Hawaii	<input type="checkbox"/> Guam	<input type="checkbox"/> Idaho	<input type="checkbox"/> Illinois
<input type="checkbox"/> Indiana	<input type="checkbox"/> Iowa	<input type="checkbox"/> Kansas	<input type="checkbox"/> Kentucky
<input type="checkbox"/> Louisiana	<input type="checkbox"/> Maine	<input type="checkbox"/> Maryland	<input type="checkbox"/> Massachusetts
<input type="checkbox"/> Michigan	<input type="checkbox"/> Minnesota	<input type="checkbox"/> Mississippi	<input type="checkbox"/> Missouri
<input type="checkbox"/> Montana	<input type="checkbox"/> Nebraska	<input type="checkbox"/> Nevada	<input type="checkbox"/> New Mexico
<input type="checkbox"/> New Hampshire	<input type="checkbox"/> New Jersey	<input type="checkbox"/> New York	<input type="checkbox"/> North Carolina
<input type="checkbox"/> North Dakota	<input type="checkbox"/> Ohio	<input type="checkbox"/> Oklahoma	<input type="checkbox"/> Northern Mariana Islands
<input type="checkbox"/> Oregon	<input type="checkbox"/> Pennsylvania	<input type="checkbox"/> Rhode Island	<input type="checkbox"/> South Carolina
<input type="checkbox"/> South Dakota	<input type="checkbox"/> Tennessee	<input type="checkbox"/> Texas	<input type="checkbox"/> Utah
<input type="checkbox"/> Vermont	<input type="checkbox"/> Virginia	<input type="checkbox"/> Washington	<input type="checkbox"/> United States Minor Outlying Islands
<input type="checkbox"/> West Virginia	<input type="checkbox"/> Wisconsin	<input type="checkbox"/> Wyoming	<input type="checkbox"/> AA Military
<input type="checkbox"/> AE Military	<input type="checkbox"/> AP Military	<input type="checkbox"/> Puerto Rico	<input type="checkbox"/> Virgin Islands
<input type="checkbox"/> US			

CANCEL **SAVE CHANGES**

The system compares the Customer’s Country/State with the Country/State from this page. Based on the page above, if the Customer is from the United States, then they will not be taxed on this Item.

Countries: The appropriate Country should be pulled from the dropdown list. This will display the States within that that Country. If Select All is chosen, this Item will be taxed in all US States. If Select All is not chosen, the States where the Item is available for purchase should be chosen. If Select All for All Countries is not chosen, then this page must be completed for each Country where the Client operates.

This marks the completion of Item Set Up for Standard Items.

The Bill of Material and Kit Categories will be reviewed in Item Kit training.

Subs/Points will be reviewed in Subscription/Point Account training.

What is a Kit

Kits in Direct Selling Terms refer to a grouping of products sold at a “Kit Price”. Kits usually include Items which can be used for a common purpose, such as a detox. Exigo commonly supports two types of Kits: Static Kits and Dynamic Kits.

Static Kits: Kits which include a pre-chosen set of Items. The Customer has no choice in the Items included in the Kit.

Dynamic Kits: Kits which include Items to be chosen by the Customer. This may include a choice of Items, quantities, flavors, sizes, etc.

An example of each is shown below.

<p style="text-align: center;">Static Kit Example</p> <p style="text-align: center;">30 Day Body Detox Kit</p> <p style="text-align: center;">4 Detox Smoothie</p> <p style="text-align: center;">1 Bottle Multi-Vitamin</p> <p style="text-align: center;">1 Bottle Transform Supplement</p> <p style="text-align: center;">1 Bottle Colon Cleanser</p> <p style="text-align: center;">1 Bottle Slim Down Support</p> <p style="text-align: center;">1 Bottle Appetite Support</p> <p style="text-align: center;">\$199.99</p>
--

<p style="text-align: center;">Dynamic Kit Example</p> <p style="text-align: center;">30 Day Weight Loss Kit</p> <p style="text-align: center;">4 Meal Replacement Shakes</p> <p style="text-align: center;">(Choose Flavors)</p> <p style="text-align: center;">4 Whey Protein Shakes</p> <p style="text-align: center;">(Choose Flavors)</p> <p style="text-align: center;">2 Bottles of Supplements</p> <p style="text-align: center;">(Choose Type)</p> <p style="text-align: center;">\$199.99</p>
--

How to Create Static Kits

All Kits include 1 Parent Item and multiple Child Items. The Parent Item name typically states that the Item is a Kit (i.e. 30 Day Body Detox Kit). The Parent Item and the Child Items should have the same Availability and Warehouse(s) chosen. Pricing and Taxation commonly occur at the Parent Item level.

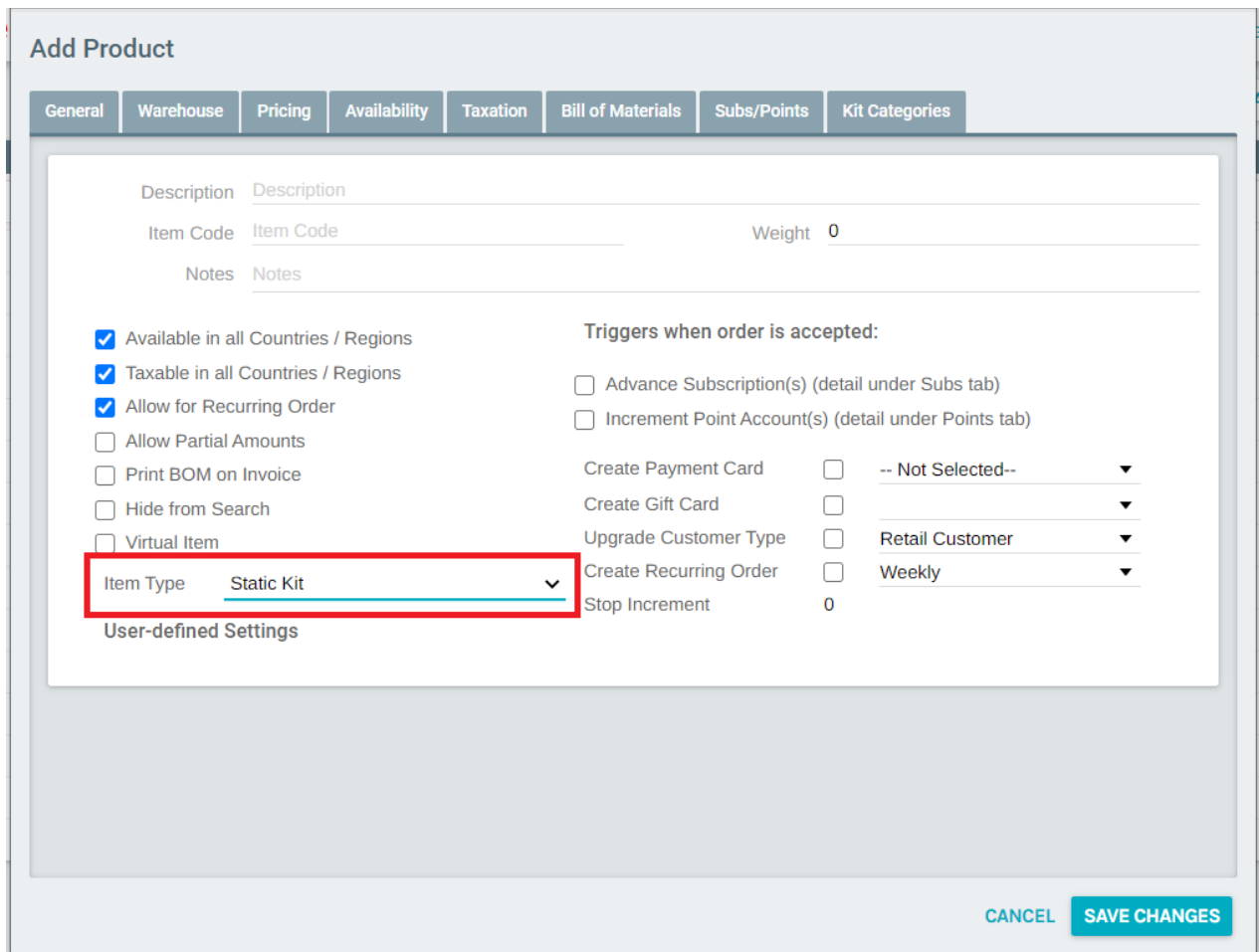
Before creating the Parent Item, you will need to ensure that your Child Items have already been created.

STEP 1 GENERAL TAB

Log in to Exigo.com and navigate to Accounting > Items > ADD ITEM

In order to create the Parent Item, follow the instructions given previously in this training module (Complete the General, Warehouse, Pricing, Availability, and Taxation Tabs).

There is one difference on the Static Kit's General Tab:

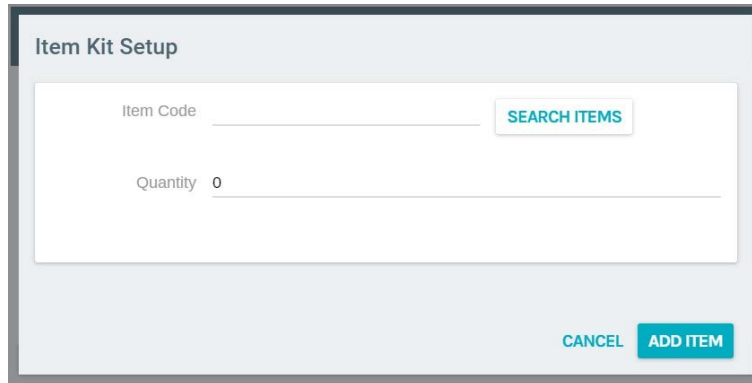


The screenshot shows the 'Add Product' form with the 'General' tab selected. The form contains several input fields and checkboxes. The 'Item Type' dropdown menu is highlighted with a red box and is set to 'Static Kit'. Below the dropdown is the 'User-defined Settings' section. At the bottom right of the form, there are 'CANCEL' and 'SAVE CHANGES' buttons.

The Item Type must be Static Kit.

STEP 2 BILL OF MATERIALS

On this tab, you will choose the Child Items to be included in the Kit. On the Bill of Materials tab, click “Add” to add Child Items.



The dialog box titled "Item Kit Setup" contains the following elements:

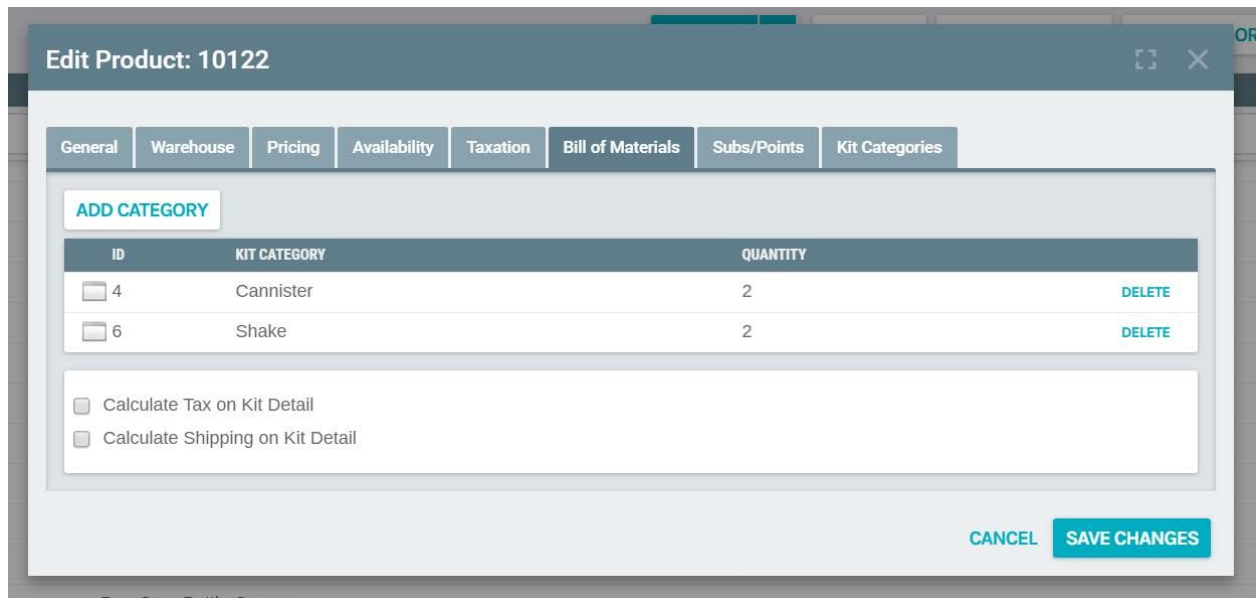
- An input field for "Item Code" with a "SEARCH ITEMS" button to its right.
- An input field for "Quantity" with the value "0" displayed.
- "CANCEL" and "ADD ITEM" buttons at the bottom right.

In this window, enter the Item Code of the Child Item and Quantity to be added to the Kit. Then click on Add Item button.

If Changes are needed to the Quantity after the Item has been added to the Kit, click on “Edit”. This will open a screen like the one above which will allow the Quantity to be changed.

If an Item needs to be removed from the Kit, click on “Remove”. This will open a screen like the one above which will prompt you to confirm that you would like to Remove the Item from the Kit.

Once Child Items are added, the Bill of Materials window for this Kit will be like the screen shot below.



The screenshot shows the "Edit Product: 10122" window with the "Bill of Materials" tab selected. The interface includes the following components:

- Navigation tabs: General, Warehouse, Pricing, Availability, Taxation, **Bill of Materials**, Subs/Points, Kit Categories.
- An "ADD CATEGORY" button.
- A table with columns: ID, KIT CATEGORY, QUANTITY, and a "DELETE" button for each row.
- Checkboxes for "Calculate Tax on Kit Detail" and "Calculate Shipping on Kit Detail".
- "CANCEL" and "SAVE CHANGES" buttons at the bottom right.

ID	KIT CATEGORY	QUANTITY	
<input type="checkbox"/> 4	Cannister	2	DELETE
<input type="checkbox"/> 6	Shake	2	DELETE

The Subs/Points Tab and Kit Categories Tab will be reviewed in future training modules.

Click “OK” and your Static Kit is complete.

How to Create Dynamic Kits

All Kits include 1 Parent Item and multiple Child Items. The Parent Item name typically states that the Item is a Kit (i.e. 30 Day Body Detox Kit). The Parent Item and the Child Items should have the same Availability and Warehouse(s) chosen. Pricing and Taxation commonly occur at the Parent Item level.

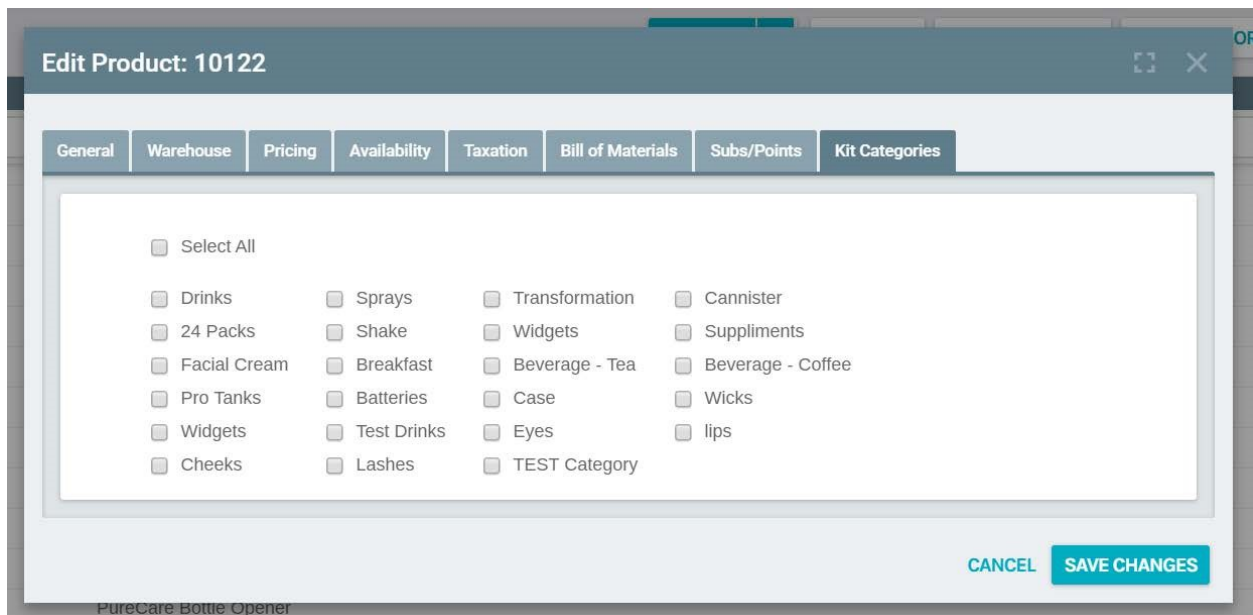
Before creating the Parent Item, you will need to ensure that your Child Items have already been created.

KIT CATEGORIES

Kit Categories apply only to Dynamic Kits and their purpose is to segment your Child Items into specific Categories. Kit Categories are commonly Nutritional Supplements, Shakes, Skin Care, etc.

Before the Dynamic Kit is set up, you will need to ensure that each of the Child Items to be included in the Dynamic Kit are placed in the appropriate Kit Category.

To do this, double click on each Item and choose the Kit Categories Tab. Then, check the box of the appropriate Categories. Items may be listed in multiple Categories if needed. For the purposes of this training module, we will ensure that “Test1” Kit Category is chosen for each Child Item.

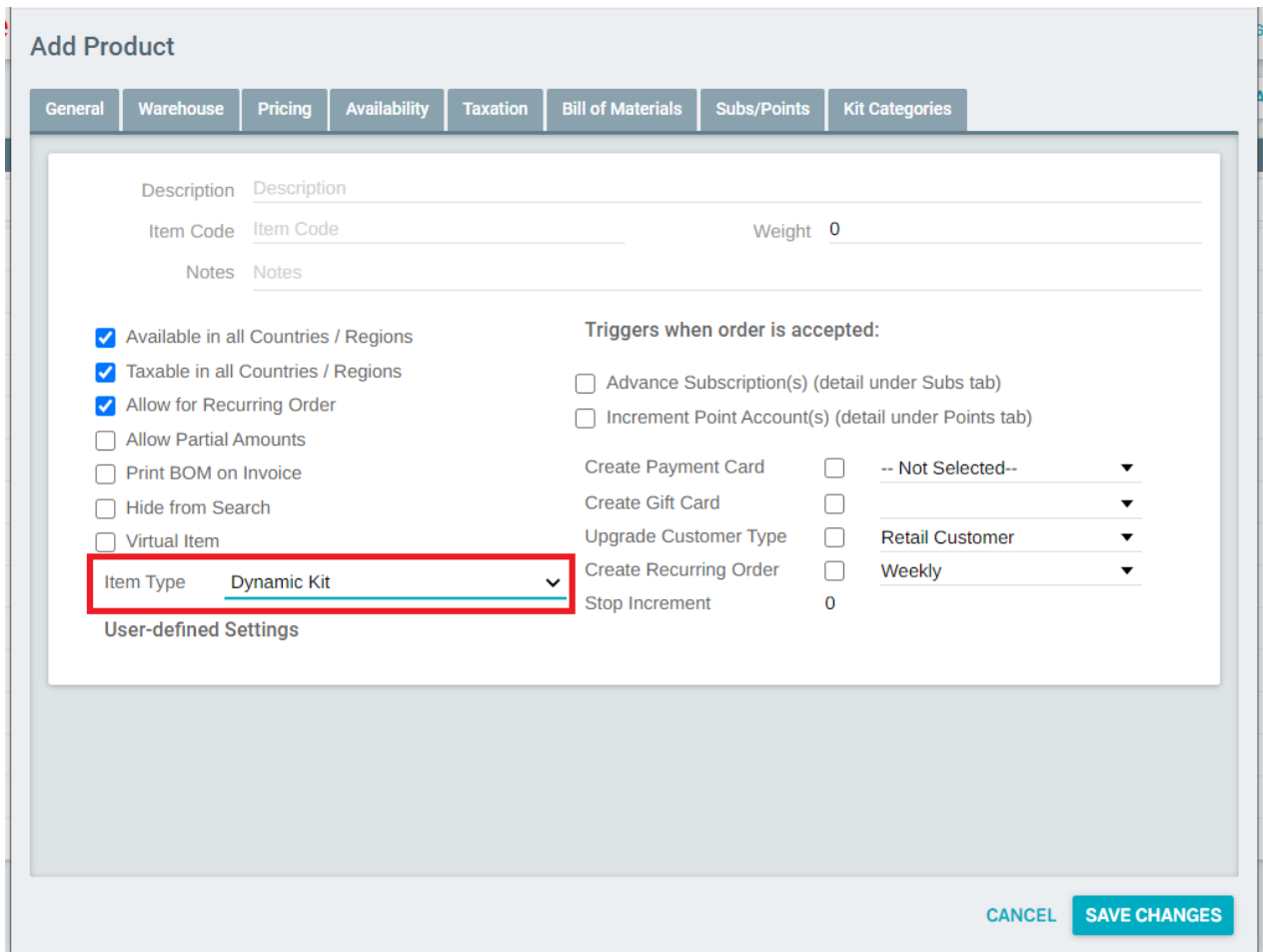


STEP 1 GENERAL TAB

Log in to Exigo.com and navigate to Accounting > Items > ADD ITEM

In order to create the Parent Item, follow the instructions given previously in this training module (Complete the General, Warehouse, Pricing, Availability, and Taxation Tabs).

There are two differences on the Dynamic Kit's General Tab:



The screenshot shows the 'Add Product' form with the following details:

- General Tab:** Description, Item Code, Weight (0), Notes.
- Checkboxes:**
 - Available in all Countries / Regions
 - Taxable in all Countries / Regions
 - Allow for Recurring Order
 - Allow Partial Amounts
 - Print BOM on Invoice
 - Hide from Search
 - Virtual Item
- Item Type:** Dynamic Kit (highlighted with a red box)
- Triggers when order is accepted:**
 - Advance Subscription(s) (detail under Subs tab)
 - Increment Point Account(s) (detail under Points tab)
 - Create Payment Card: -- Not Selected--
 - Create Gift Card: [Dropdown]
 - Upgrade Customer Type: Retail Customer
 - Create Recurring Order: Weekly
 - Stop Increment: 0
- User-defined Settings:** (Empty)
- Buttons:** CANCEL, SAVE CHANGES

Item Type must be set to Dynamic Kit. The system may prompt you to save the Item before checking the Print BOM on Invoice box.

Print BOM on Invoice must be checked in order to fully set up the Dynamic Kit.

NOTE: Do not choose a Kit Category for the Parent Item. For further details about the Static and Dynamic Kits there is a special material available named "Dynamic Kits vs Static Kits".

STEP 2 BILL OF MATERIALS TAB

By clicking on the Bill of Materials Tab, you will notice immediately that this tab looks different for Dynamic Kits. For the purposes of this training module, only the “Test 1” Kit Category will be utilized.

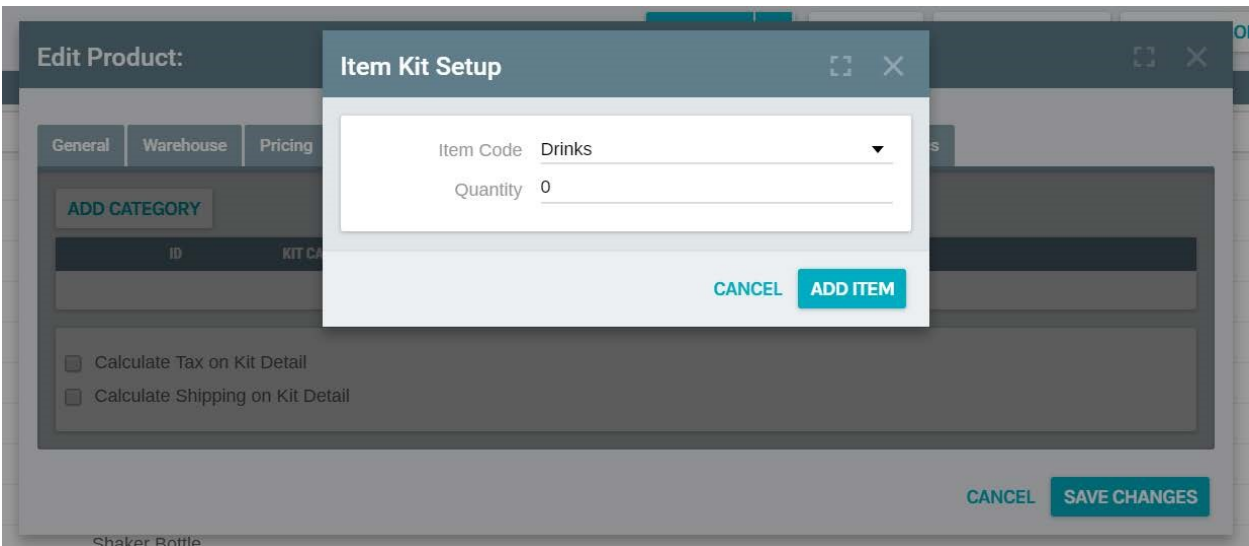
As you can see from the screen shot above, this Kit will contain a Quantity of “2” Items for this Kit. The Customer will have the opportunity to choose the Child Items specified in this Category during the Order process.

Notice the boxes at the bottom of the screen. We said previously that Taxation and Shipping Costs are commonly calculated at the Parent Item Level. However, Exigo has the ability to calculate at the Child Item Level. Checking these boxes will cause the system to calculate at the Child Item Level. This is a Business Decision that will need to be made by the Client.

To Remove a Category from the BOM, highlight the Category and click Remove. A window will appear to confirm your choice. You will then click OK to remove the Category.

Adding Categories will be outlined on the next page.

To Add Categories Click the ADD CATEGORY button. The following window will open.



From this window, you will choose the Category from the drop down list and the Quantity of Items to be included in the Kit. Once you have made these selections, click OK on the small window and then OK on the larger window.

The Subs/Points Tab and Kit Categories Tab will be reviewed in future training modules.

This completes the basic set up of a Dynamic Kit.

Congratulations! You have completed Level 1 Training on Item Management.