



# Items: Verification

v 1.0

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## Verification of Items

This document explains how to conduct verification on Items. Each of the following steps will be included in this document. Please note that it is the client's responsibility to verify all Item fields even though data may have been imported. Verification must occur on EACH Item.

1. General Item Settings
2. Item Warehouse Assignment
3. Item Pricing
4. Item Availability
5. Item Taxation

\*This document covers on Standard Items. A separate exercise will be conducted for all Kits.

## General Item Settings

To verify the general settings of the Items, log into Exigo.com and go to Accounting > Items.

Click on an Item. The following window will be displayed.

**Edit Product: 0000001**
⊞ ×

General

Warehouse

Pricing

Availability

Taxation

Bill of Materials

Subs/Points

Kit Categories

Description **1 POUCH OF HMS90**

Item Code **0000001** Weight **0.0300**

Notes 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**

DoNotChargeShipping

IESPSYS Cal Item

**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  **Consultant** ▼

Create Recurring Order  **Monthly** ▼

Stop Increment ▼

Product Type ▼

IESPSYS Liters

Stop Sell Amount **-100**

CANCEL
SAVE CHANGES

Ensure the following settings are correct on this Tab:

1. Description
2. Weight
3. Allow for Recurring Order

**Don't forget to "Save Changes" on each Page.**

## Item Warehouse Settings












To verify the warehouse settings of the Items, log into Exigo.com and go to Accounting > Items.

Click on an Item. The following window will be displayed. Click on Warehouse.

**Edit Product: 0000001** ⌵ ✕

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"/> California	Not Managed	▼ 1000000000
 <input checked="" type="checkbox"/> Canada	Not Managed	▼ 1000000000
 <input type="checkbox"/> Dallas TX	Not Managed	▼ Max Quantity on Order
 <input type="checkbox"/> Dermolab	Not Managed	▼ Max Quantity on Order
 <input type="checkbox"/>	Not Managed	▼ Max Quantity on Order
 <input type="checkbox"/> DuVar	Not Managed	▼ Max Quantity on Order
 <input type="checkbox"/> Europe	Not Managed	▼ Max Quantity on Order
 <input type="checkbox"/> Immunotec 2 fab	Not Managed	▼ Max Quantity on Order
 <input type="checkbox"/> Lallemand	Not Managed	▼ Max Quantity on Order
 <input type="checkbox"/> Others	Not Managed	▼ Max Quantity on Order
 <input type="checkbox"/> Pharmalab	Not Managed	▼ Max Quantity on Order

**CANCEL** **SAVE CHANGES**

Ensure that the Item is assigned to the proper Warehouses. NOTE: This is critical and will affect the ability to sell the Item if it is not assigned to the proper warehouses.

**Don't forget to "Save Changes" on each Page.**

## Item Pricing Settings

To verify the pricing settings of the Items, log into Exigo.com and go to Accounting > Items.

Click on an Item. The following window will be displayed. Click on Pricing.

Edit Product: 0000001
⌵ ✕

General

Warehouse

Pricing

Availability

Taxation

Bill of Materials

Subs/Points

Kit Categories

Currency Dollars (US) ▼
EXTENDED PRICING

	PRICE	TAX ON PRICE	SHIP ON PRICE	PV	CV
💰 Retail (0%)	0.0000	0.0000	0.0000	0.0000	0.0000
💰 Preferred (25%)	0.0000	0.0000	0.0000	0.0000	0.0000
💰 Wholesale (30%)	0.0000	0.0000	0.0000	0.0000	0.0000
💰 Entrepreneur (20%)	0.0000	0.0000	0.0000	0.0000	0.0000
💰 Employee (0\$)	0.0000	0.0000	0.0000	0.0000	0.0000

CANCEL
SAVE CHANGES

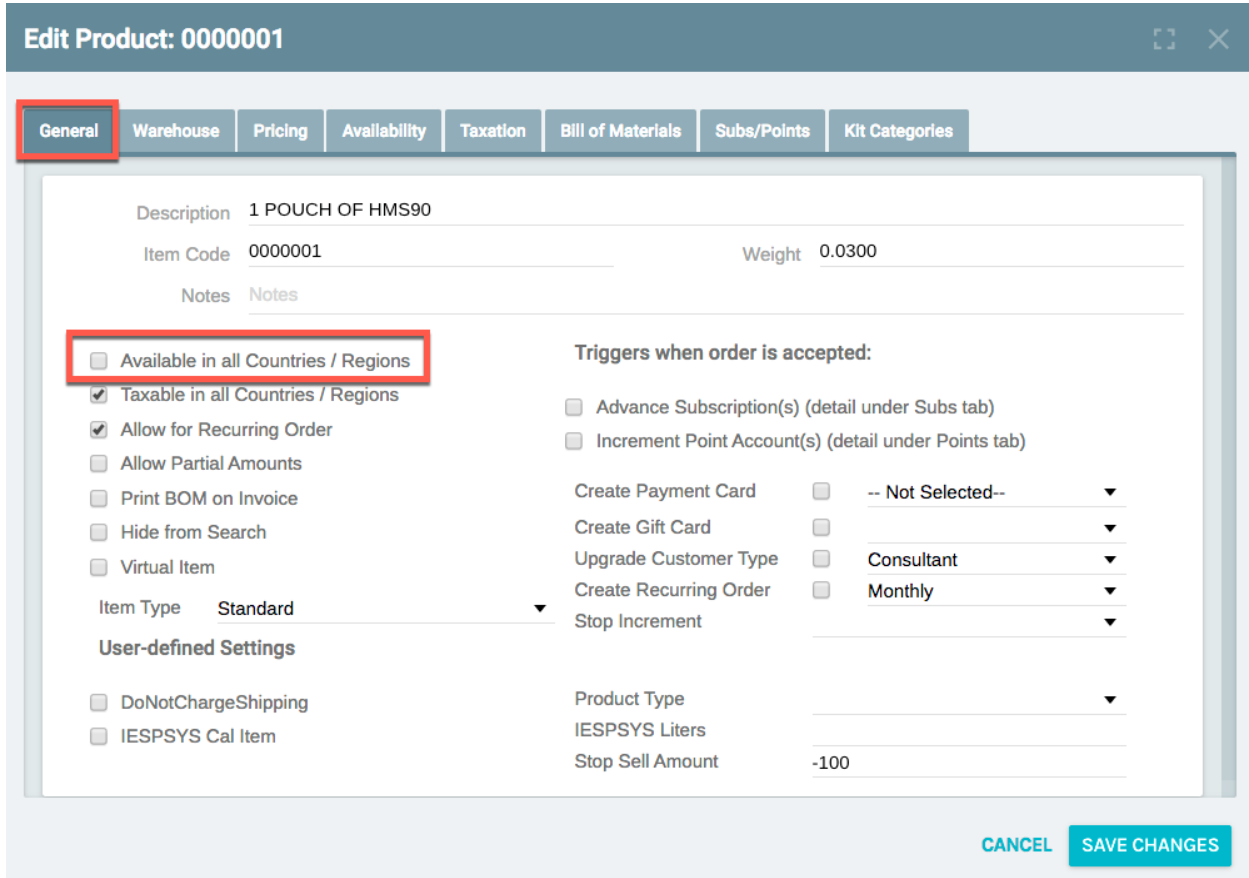
Ensure the following values are supplied for each Price Type: Retail, Preferred, Wholesale, Entrepreneur, and Employee. **NOTE: This screen must be filled out for EACH Currency using the drop down menu.**

1. **Price:** This is the Price at which the Item will be sold. Each Price Type may have a different value.
2. **Tax on Price:** This is the Price at which taxation is calculated for the Item. Without population of this value, no tax will be charged.
3. **Ship on Price:** This is the Price at which shipping is calculated for the Item. Without population of this value, Shipping will not be calculated if you calculation Shipping by Price.
4. **PV:** This value is commonly used to determine qualifications for Ranks and some Bonuses. If the value is blank, no volume will be awarded for the sale.
5. **CV:** This value is commonly used to determine Commissions Payout. If the value is blank, no volume will be awarded for the sale.

**Don't forget to "Save Changes" on each Page.**

## Item Availability Settings

To verify the availability settings of the Items, log into Exigo.com and go to Accounting > Items. Click on an Item. The following window will be displayed. Click on General first.



**Edit Product: 0000001**

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

Description: 1 POUCH OF HMS90  
Item Code: 0000001 Weight: 0.0300  
Notes: 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  
 DoNotChargeShipping  
 IESPSYS Cal Item

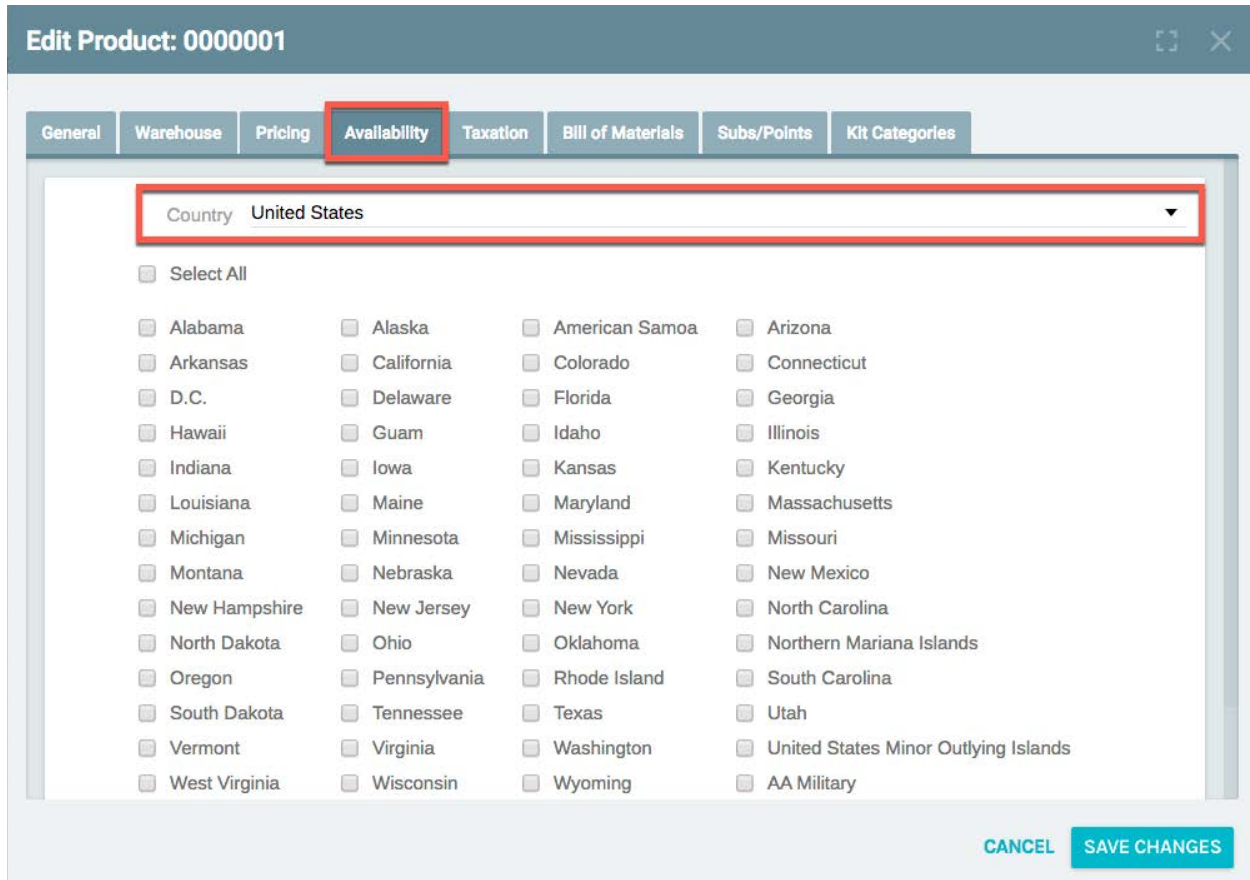
Triggers when order is accepted:  
 Advance Subscription(s) (detail under Subs tab)  
 Increment Point Account(s) (detail under Points tab)  
Create Payment Card: -- Not Selected--  
Create Gift Card:   
Upgrade Customer Type: Consultant  
Create Recurring Order: Monthly  
Stop Increment:   
Product Type:   
IESPSYS Liters:   
Stop Sell Amount: -100

CANCEL SAVE CHANGES

If the Item should be available for Sale in ALL Countries, check the box next to “Available in all Countries / Regions”.

**Don't forget to “Save Changes” on each Page.**

If the Item should only be available for Sale in specific Countries, leave the box unchecked and click on the Availability Tab. Clicking on the Availability Tab will open the following window:



**Edit Product: 0000001**

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

**CANCEL** **SAVE CHANGES**

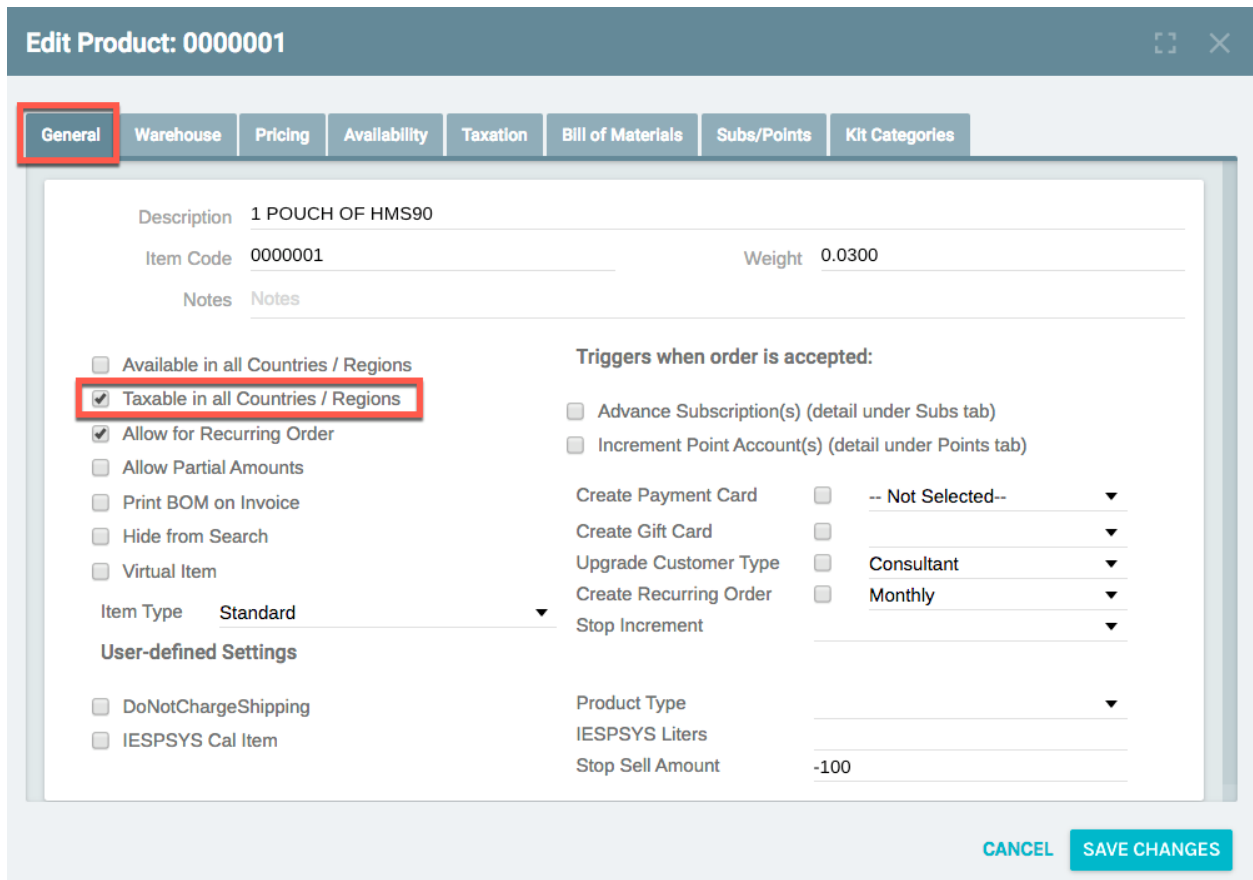
Use the drop-down menu to Select Country and then check the box next to the appropriate State/Province in order to make the Item Available. NOTE: If the checkbox next to "Alabama" is not checked, the Item cannot be sold to anyone with an Alabama address. Please ensure this is completed for each Country in the drop-down list.

**Don't forget to "Save Changes" on each Page.**

## Item Taxation Settings

To verify the taxation settings of the Items, log into Exigo.com and go to Accounting > Items.

Click on an Item. The following window will be displayed. Click on General first.



**Edit Product: 0000001**

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

Description **1 POUCH OF HMS90**

Item Code **0000001** Weight **0.0300**

Notes **Notes**

Available in all Countries / Regions

**Taxable in all Countries / Regions**

Allow for Recurring Order

Allow Partial Amounts

Print BOM on Invoice

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Virtual Item

Item Type **Standard**

**User-defined Settings**

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**Triggers when order is accepted:**

Advance Subscription(s) (detail under Subs tab)

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Create Payment Card  **-- Not Selected--**

Create Gift Card

Upgrade Customer Type  **Consultant**

Create Recurring Order  **Monthly**

Stop Increment

Product Type

IESPSYS Liters

Stop Sell Amount **-100**

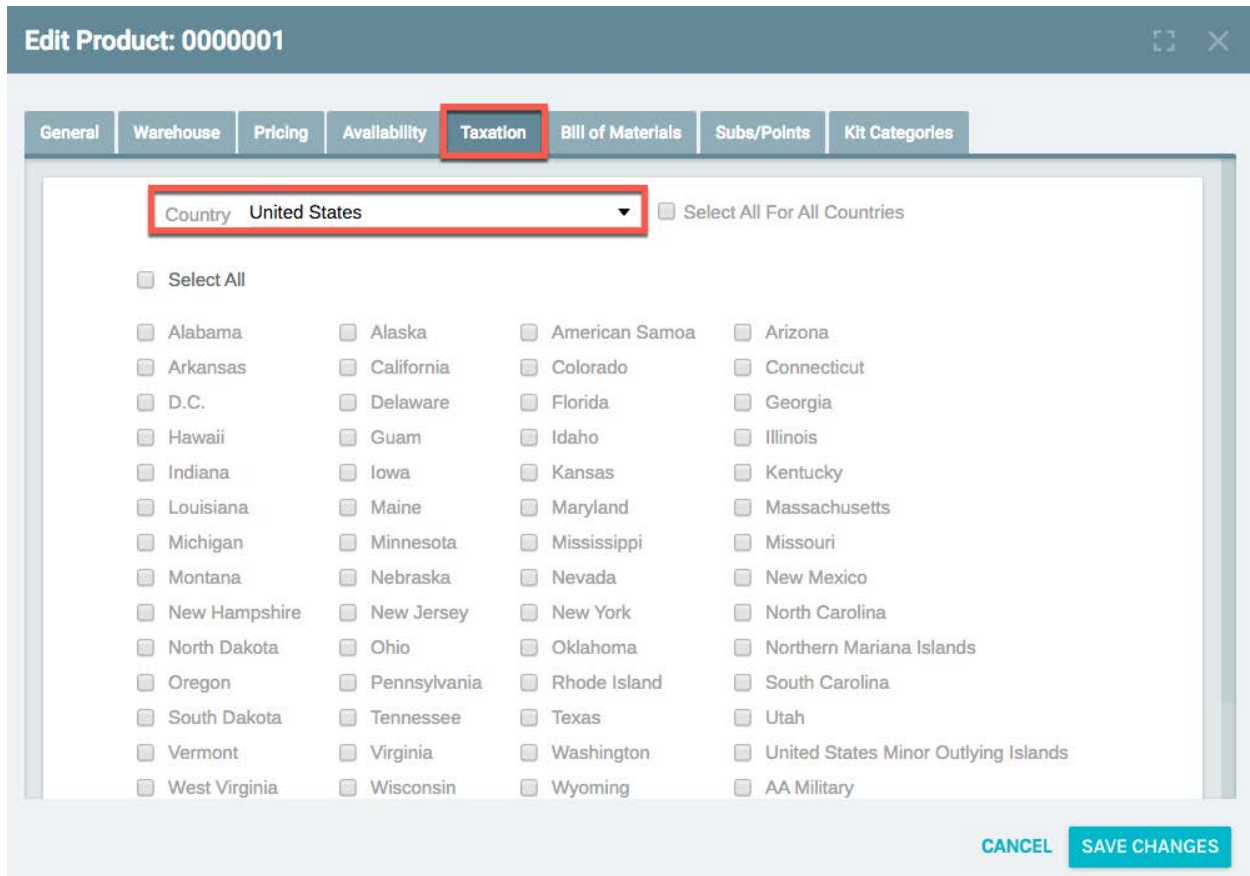
**CANCEL** **SAVE CHANGES**

If the Item should be Taxable in ALL Countries, check the box next to “Taxable in all Countries / Regions”.

**Don't forget to “Save Changes” on each Page.**



If the Item should only be Taxable in specific Countries, leave the box unchecked and click on the Taxation Tab. Clicking on the Taxation Tab will open the following window:



**Edit Product: 000001**

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

**CANCEL** **SAVE CHANGES**

Use the drop-down menu to Select Country and then check the box next to the appropriate State/Province in order to make the Item Taxable. NOTE: If the checkbox next to "Alabama" is not checked, the Item will not be sold taxed if sold to anyone with an Alabama address. Please ensure this is completed for each Country in the drop-down list.

**Don't forget to "Save Changes" on each Page.**