New Customer Set Up

v 1.1

Contents

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

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What is a Customer?

In Exigo, Customers are defined as anyone who wishes to sign up or purchase products from the Client. A clear distinction needs to be made here between Client and Customer.

Client: A Company that runs their business through Exigo.

Customer: An end user of the Client. Specifically, an end user who purchases products from the Client. Customers within Exigo may have many different possible designations. Customer designations are determined by the Client.

The three most common types of Customers are:

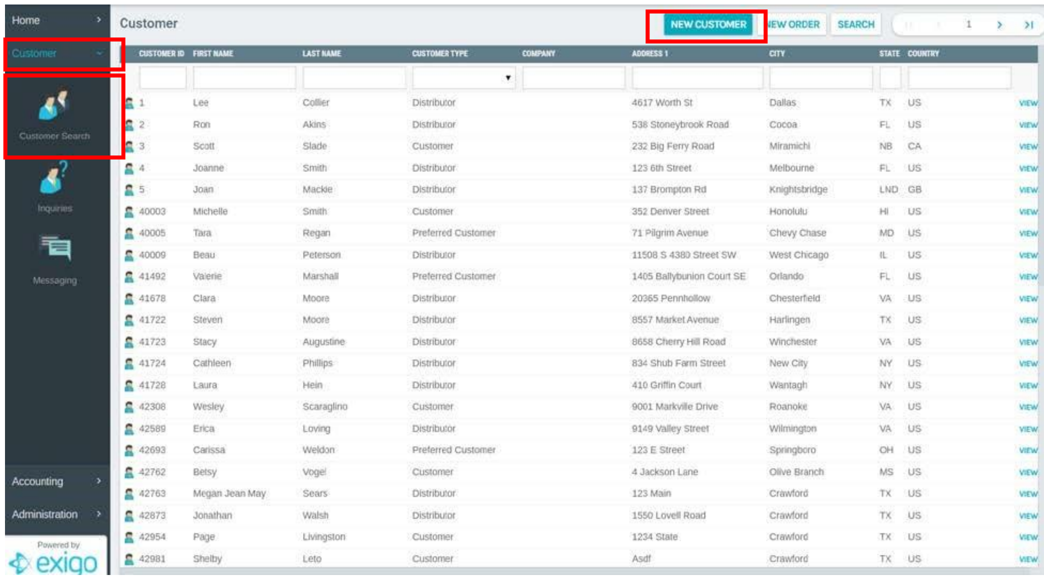
- **Retail**: These Customers typically receive Retail Pricing and do not have the ability to achieve Ranks, Bonuses, or Commissions. Retail Customers usually do not have the ability to Enroll new Customers.
- **Preferred**: These Customers typically receive lower Pricing than Retail Customers and may be eligible for other incentives as defined by the Client. In some cases, Preferred Customers can Enroll new Customers, but this is not the norm.
- **Distributor**: These Customers typically receive Wholesale Pricing and can achieve Ranks, Bonuses, and Commissions. Distributors are the Customers that Enroll new Customers and Sponsor them throughout their lifecycle. Distributors may be considered independent business owners who sell the products of the Client.

How to Create a Customer

To create a new Customer, log in to Exigo.com and navigate to:

Customer > Customer Search.

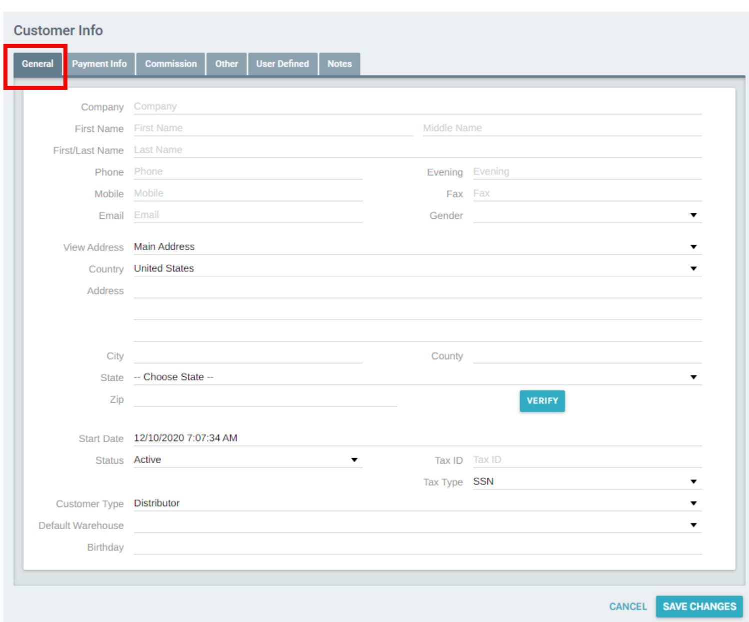
The following screen will be displayed showing all existing Customers.



Clicking on New Customer will open the window shown on the next page.

ADD A NEW CUSTOMER – GENERAL TAB

Clicking on New Customer opens the window below. Always start with the General Tab. Each field will be explained below.



Company: Some Distributors may choose to use a Company Name instead of their own name. This Company name is typically a "Doing Business As" Name. (Not Required)

First/Last Name: These two fields are required. For some Clients, the Name entered here must match the Name on the Paperwork/Legal Name.

Phone: This is also referred to as "Day Phone". This field may be required by the Client.

Evening: This is typically the Home Phone Number. (Not Required)

Mobile: This is the Mobile Phone Number. This field is often required to receive SMS messages.

Fax: This is the Fax Number. (Not Required)

Email: This is the main Email Address for the Customer. This field is often required by the Client to receive communications.

Gender: Values for this field are Male, Female, Unspecified. This field is typically not required.

View Address: This field allows the input of multiple Addresses. The Main Address is required. The other most common type of Address is the Mail Address (or Shipping Address). Mail Address is only required if it is different from the Main Address. Most clients prohibit the use of P.O. Boxes for Addresses.

Address (3 Lines): These fields are standard Address fields and are required for proper functioning of Orders.

Country: The Country associated with the Address. (Required)

City: The City associated with the Address. (Required)

County: The County is often not used but may be required by the client for internal purposes.

State: This is the Standard State associated with the Address. Basic functionality also includes State Codes for military addresses. (Required)

Zip: The Zip Code associated with the Address. (Required)

Verify: This button is used to Verify the Address entered with the USPS. A checkmark will appear if the Address is Verified.

Start Date: This is the date the Customer is enrolled. (Required)

Status: This is the Customer Status. Customer Status is defined by the Client. Choose the appropriate Customer Status from the drop-down menu. The most common Customer Statuses are Active, Inactive, Terminated.

Tax ID: This field will accept multiple types of Tax IDs including TIN and SSN. The field will accept dashes. Some Clients require this field – especially for Distributors.

Tax Type: This field identifies the Type of Tax ID. Choose the appropriate type from the drop down. (Required if the Tax ID is required).

Customer Type: This field identifies the Type of Customer and is required for proper system functioning. The Customer Types are defined by the Client. The three most common types are Distributor, Preferred, and Retail.

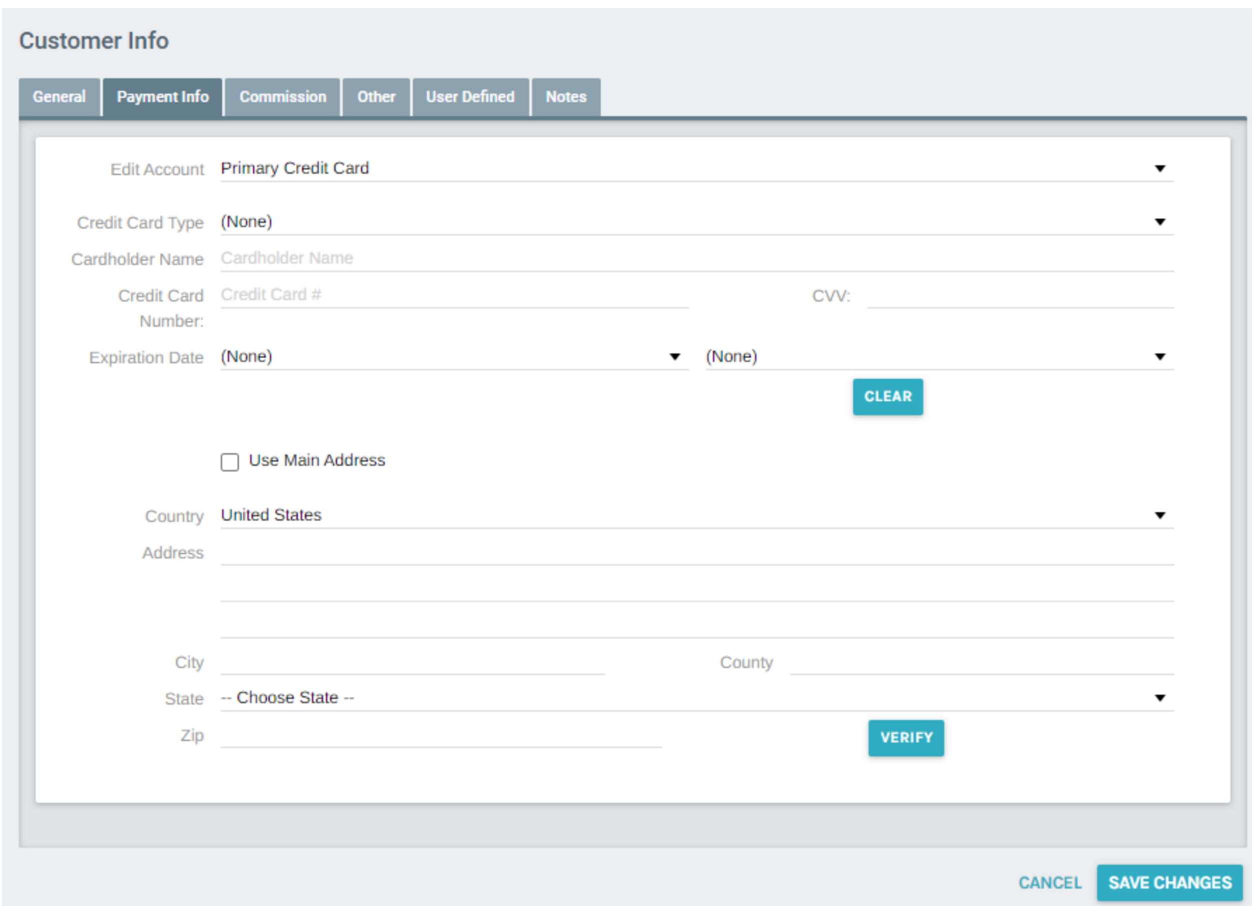
Default Warehouse: Each Customer is tied to a Warehouse. This is the Warehouse from which the Customer typically receives Orders. This can be overridden when placing an Order.

Birthday (Required): This is the Birth Date of the Customer. This is sometimes required by Clients so that special promotions and/or communications may be sent to the Customer around the time of their Birthday.

ADD A NEW CUSTOMER – PAYMENT INFO TAB

This screen allows the entry of up to 2 Credit Cards, a Checking Account, and 2 Wallet Accounts.

This Page is used for Payment of Orders. Each field will be explained on the following page.



Edit Account: Use this field to select the payment type you would like to add. You may enter multiple types of Payment Information: Primary Credit Card, Secondary Credit Card, Checking Account, Primary Wallet Account, and Secondary Wallet Account. This document will only cover the entry of Credit Cards.

Credit Card Type: This field identifies the type of Credit Card to be entered. The choices are: Unknown, Visa, MasterCard, Amex, Discover. The Credit Card Types used are defined by the Client.

Cardholder Name: This is the Name shown on the Credit Card. (Required)

Credit Card #: This is the full Credit Card Number. (Required)

Expiration Date: This is the Expiration Date shown on the Card. (Required)

NOTE: Exigo does not store CVV.

Use Main Address: This check box allows the use of the Main Address (previously entered on the General Tab) as the Billing Address for the Card. If the Billing Address is different from the Main Address, then the correct Billing Address must be entered.

Country: The Country associated with the Address. (Required)

Address (3 Lines): These fields are standard Address fields and are required for proper functioning of Orders.

City: The City associated with the Address. (Required)

County: The County is often not used but may be required by the client for internal purposes.

State: This is the Standard State associated with the Address. Basic functionality also includes State Codes for military addresses. (Required)

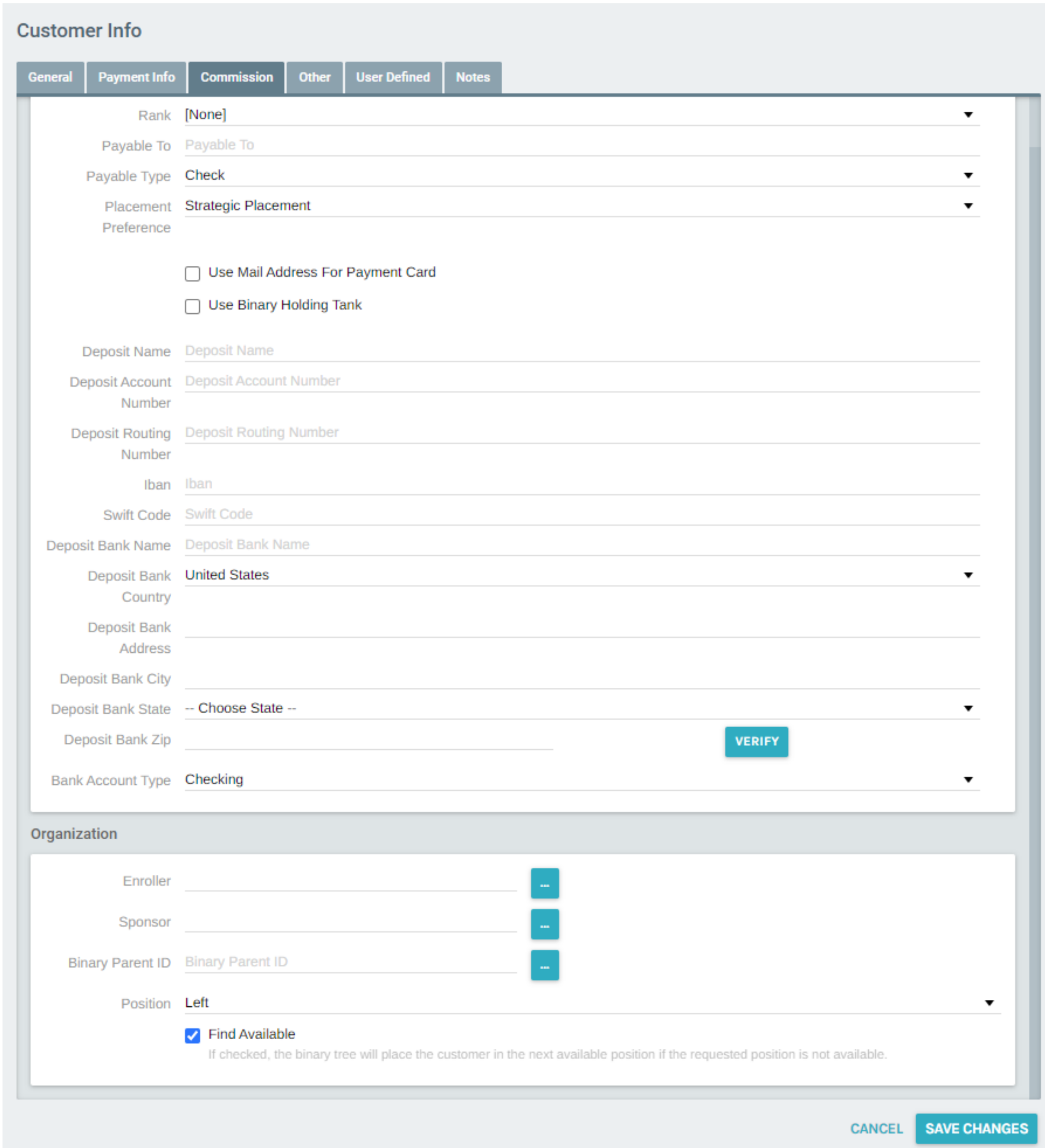
Zip: The Zip Code associated with the Address. (Required)

Verify: This button is used to Verify the Address entered with the USPS. A checkmark will appear if the Address is Verified.

ADD A NEW CUSTOMER – COMMISSION TAB

This tab is mainly used to enter account information for Commissions Payout. However, there are two key fields at the bottom of the tab related to the Client's Tree.

Each field will be explained below.



Use Mail Address for Payment Card: This box may be checked if the Mail Address is to be used for Payment Card Creation. Payment Cards are created by vendors such as Hyperwallet.

Use Binary Holding Tank: This box may be checked to indicate to the system that you want the account created without requiring Binary Placement.

Deposit Name: This is the Name listed on the Deposit Account. This may be different from the Customer Name.

Deposit Account Number: The Account Number where the Deposit will be made. If this number is not correct, payment cannot be made via Direct Deposit.

Deposit Routing Number: The Routing Number of the Bank where the Deposit will be made. If this number is not correct, payment cannot be made via Direct Deposit.

Iban: The International Bank Account Number is an internationally agreed system of identifying bank accounts across national borders to facilitate the communication and processing of cross border transactions with a reduced risk of transcription errors. If this is applicable, the Bank will supply the value.

Swift Code: This is a unique identification code for both financial and non-financial institutions established by the International Organization for Standardization. The acronym SWIFT stands for the Society for Worldwide Interbank Financial Telecommunication.

Deposit Bank Name: This is the name of the Financial Institution where the Deposit will be made (i.e. Bank of America).

Deposit Bank Address: This is the address of the Bank where the Deposit will be made.

Deposit Bank City: This is the City in which the Bank is located.

State: This is the State in which the Bank is located.

Country: This is the Country in which the Bank is located.

Deposit Bank Zip: This is the Zip Code of the Bank where the Deposit will be made.

Verify: This button may be used to verify the address with the USPS.

Bank Account Type: This identifies the type of account to which the Deposit will be made.

Enroller: This field identifies the Customer under which the New Customer will be added. This field must be filled out for all Customer Types. This field affects the Enroller Tree.

Sponsor: This field identifies the Customer under which the New Customer will be added. This field is only required for Customer Types that can Sponsor other Customers. This field affects the Unilevel/Binary Tree.

Position: This denotes which side of the indicated Binary Parent you want to place the new account on in the Binary Tree.

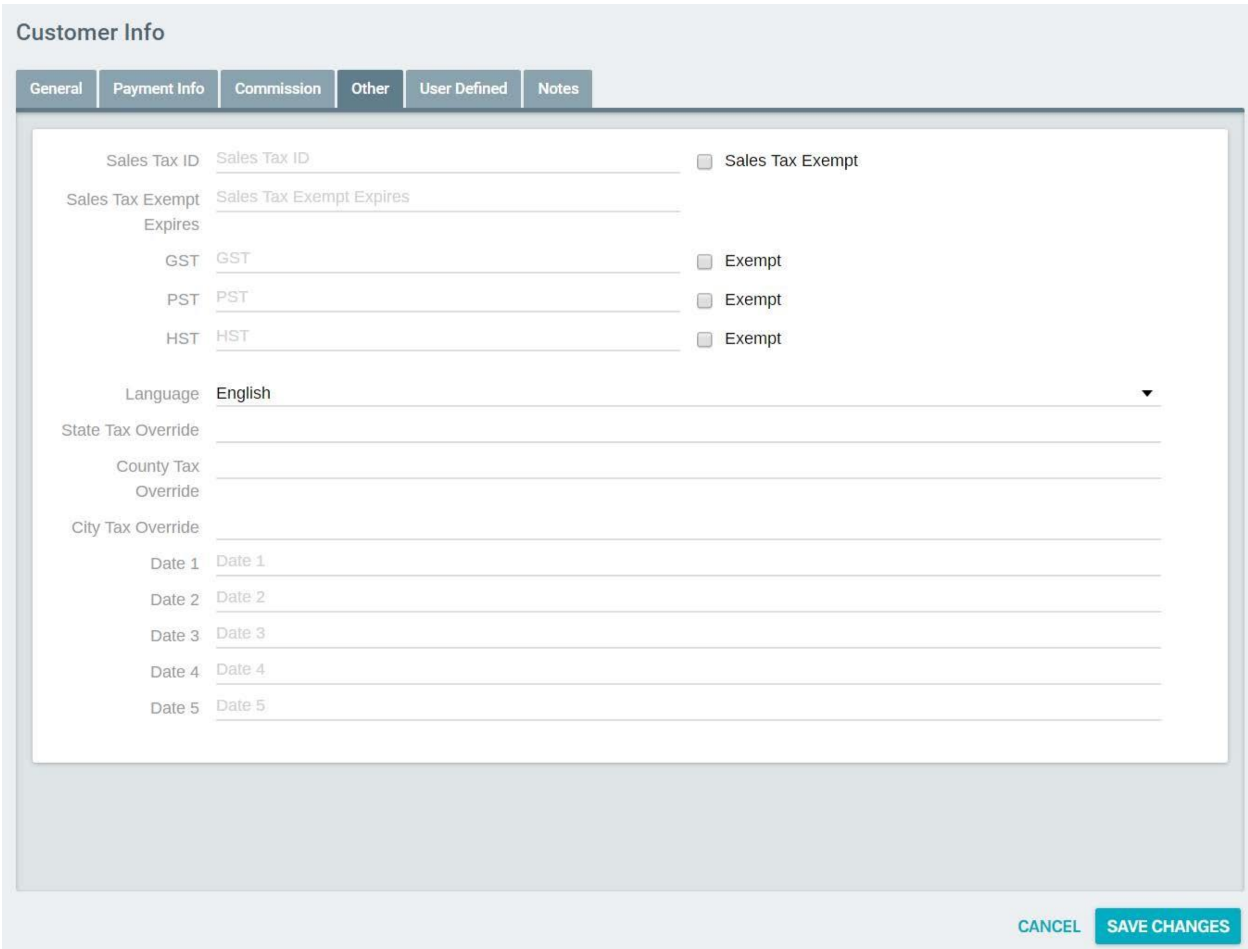
Find Available: If checked, the binary tree will place the customer in the next available position if the requested position is not available.

ADD A NEW CUSTOMER – OTHER TAB

The two most important aspects of this tab are Sales Tax Exemption and Language. The remainder of the fields will be covered in future training modules.

To identify a Customer as Sales Tax Exempt, ensure the Sales Tax ID and Sales Tax Exempt Expires fields are completed and the Sales Tax-Exempt box is checked.

To select Language Preference, choose the appropriate language from the drop-down menu.

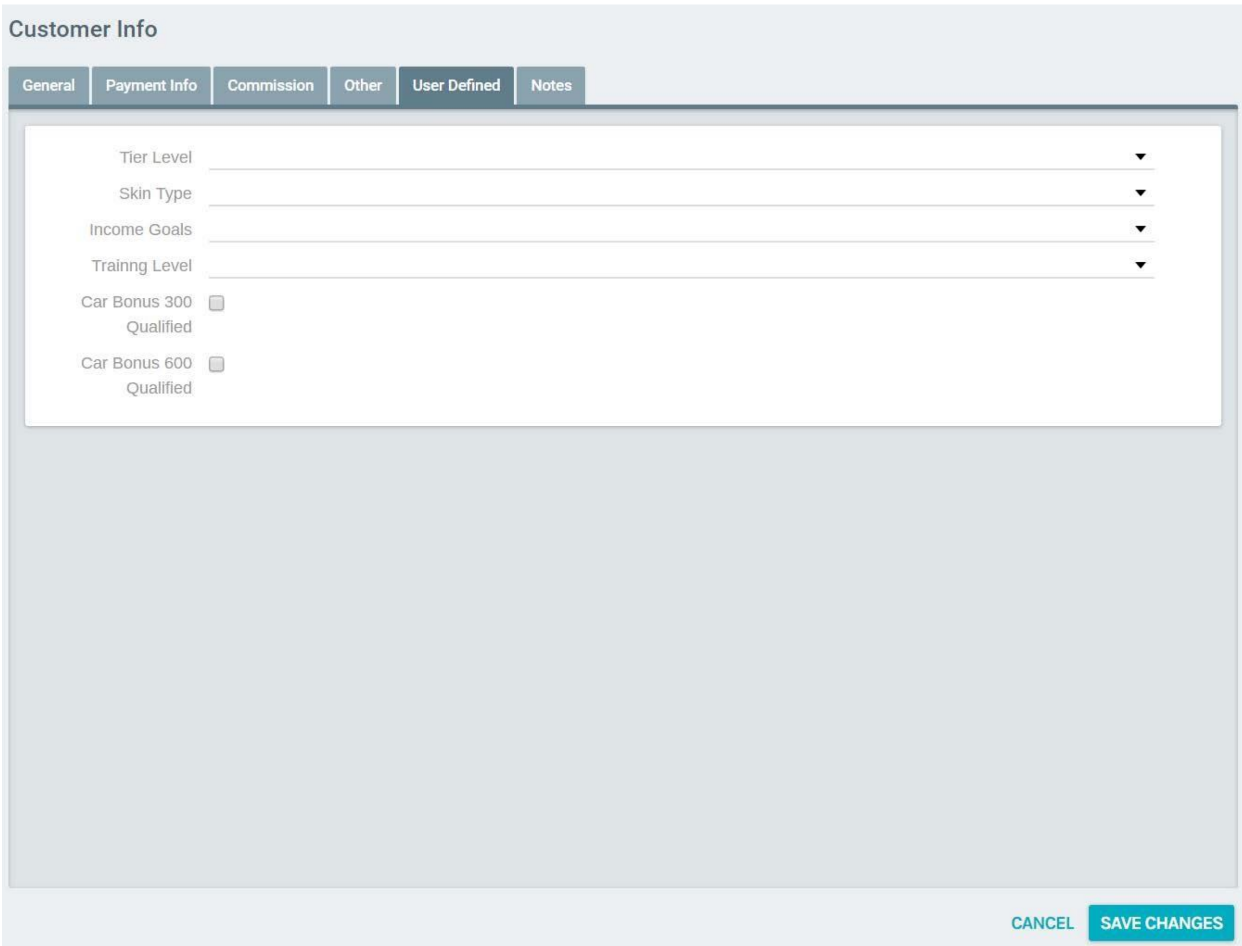


ADD A NEW CUSTOMER – USER DEFINED TAB

This tab houses the User Defined Fields at the Customer Level. Each client has a limited number of User Defined Fields at the Customer Level (15 total). These fields are defined by the Client.

To configure User Defined Fields, go to Administration > Settings > Modify Customer Settings > Custom Fields.

Below are examples of User Defined Fields at the Customer Level.



ADD A NEW CUSTOMER – NOTES TAB

This tab allows the ability to enter notes on the Customer. The Customer will not see these notes. These are often helpful for Customer Service Teams. The notes are free form. It is always recommended that the person entering the note include their name and date.