



Order Management: Order Search

v 1.1

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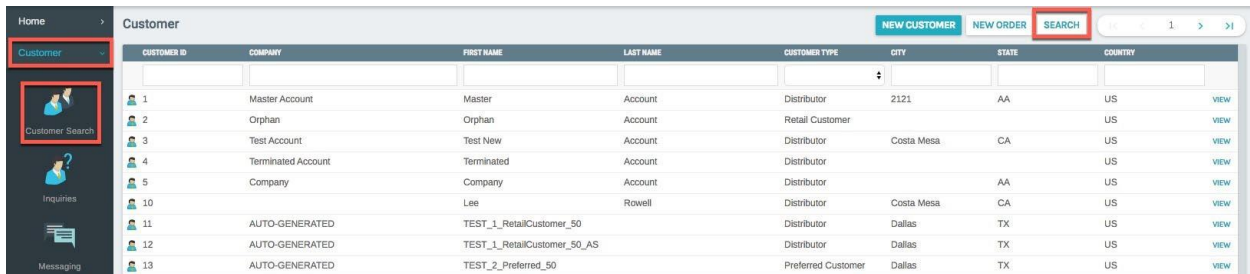
HOW TO SEARCH FOR AN ORDER

There are two primary methods to search for an Order in Exigo:

1. Search by Order ID
2. Search by Customer

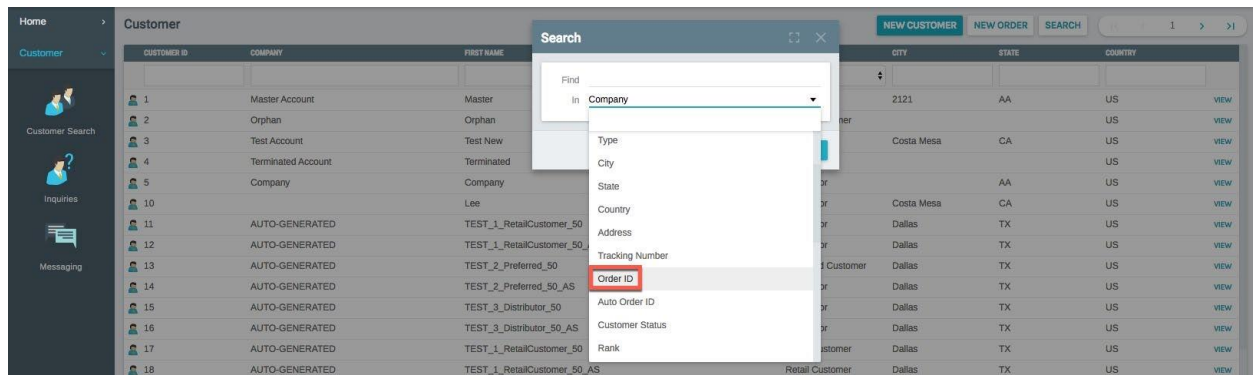
SEARCHING BY ORDER ID

If the Order ID is known, searching by Order ID is the fastest method for locating the details of the Order. To start a Search, navigate to **Customer > Customer Search > Search**.



| CUSTOMER ID | COMPANY | FIRST NAME | LAST NAME | CUSTOMER TYPE | CITY | STATE | COUNTRY | |
|-------------|--------------------|-----------------------------|-----------|--------------------|------------|-------|---------|------|
| 1 | Master Account | Master | Account | Distributor | 2121 | AA | US | VIEW |
| 2 | Orphan | Orphan | Account | Retail Customer | | | US | VIEW |
| 3 | Test Account | Test New | Account | Distributor | Costa Mesa | CA | US | VIEW |
| 4 | Terminated Account | Terminated | Account | Distributor | | | US | VIEW |
| 5 | Company | Company | Account | Distributor | | AA | US | VIEW |
| 10 | | Lee | Rowell | Distributor | Costa Mesa | CA | US | VIEW |
| 11 | AUTO-GENERATED | TEST_1_RetailCustomer_50 | | Distributor | Dallas | TX | US | VIEW |
| 12 | AUTO-GENERATED | TEST_1_RetailCustomer_50_AS | | Distributor | Dallas | TX | US | VIEW |
| 13 | AUTO-GENERATED | TEST_2_Prefered_50 | | Preferred Customer | Dallas | TX | US | VIEW |

Clicking on “Search” will display the following window:



Find

In Company

- Type
- City
- State
- Country
- Address
- Tracking Number
- Order ID**
- Auto Order ID
- Customer Status
- Rank

There are multiple fields from which to search.

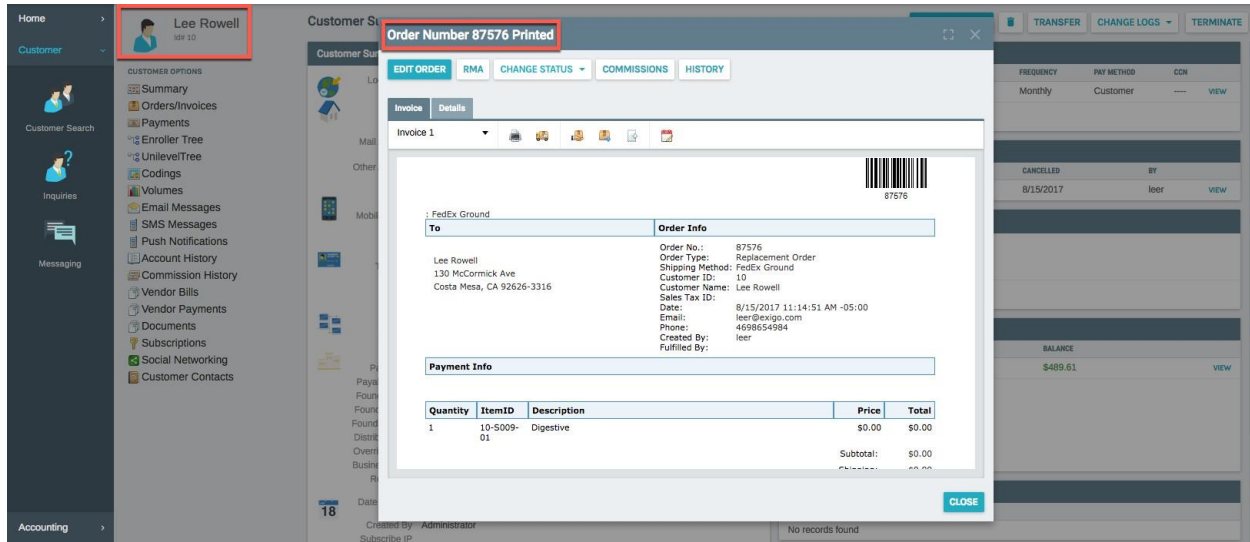
To Search for an Order ID first click on the drop down for the “In” field and choose “Order ID”.

Populate the “Find” field with the Order ID.

Click “Search”

Clicking on “Search” has two effects:

1. The Customer Record will be displayed in the background.
2. The Order Invoice will be displayed in the foreground.



SEARCHING BY CUSTOMER

If the Order ID is not known, it is possible to first locate the Customer and then the Order. This search process begins in the same place: **Customer > Customer Search > Search**. Refer to screen shots on the previous page. To use multiple fields to search for the customer, click on **Advanced** within the search window.

To locate the Customer, you may use any of the following fields to Search for the Customer:

Customer ID: Numeric Customer ID assigned by Exigo

Company: The Company or DBA name of the Customer

First Name: The First Name of the Customer

Last Name: The Last Name of the Customer

Type: The Customer Type (Distributor, Retail, Preferred, etc.)

City: City from the Main Address of the Customer

State: State from the Main Address of the Customer

Country: Country from the Main Address of the Customer

Address: Address from the Main Address of the Customer

Customer Status: Status of the Customer (Active, Inactive, Suspended, Terminated, etc.)

Rank: Rank of the Customer (Ranks specific to client)

Entry Date: Date the Customer was entered in the system

Email: Email Address of the Customer

Phone: Phone Number of the Customer

Zip: Zip Code of the Customer

Login Name: Login Name of the Customer

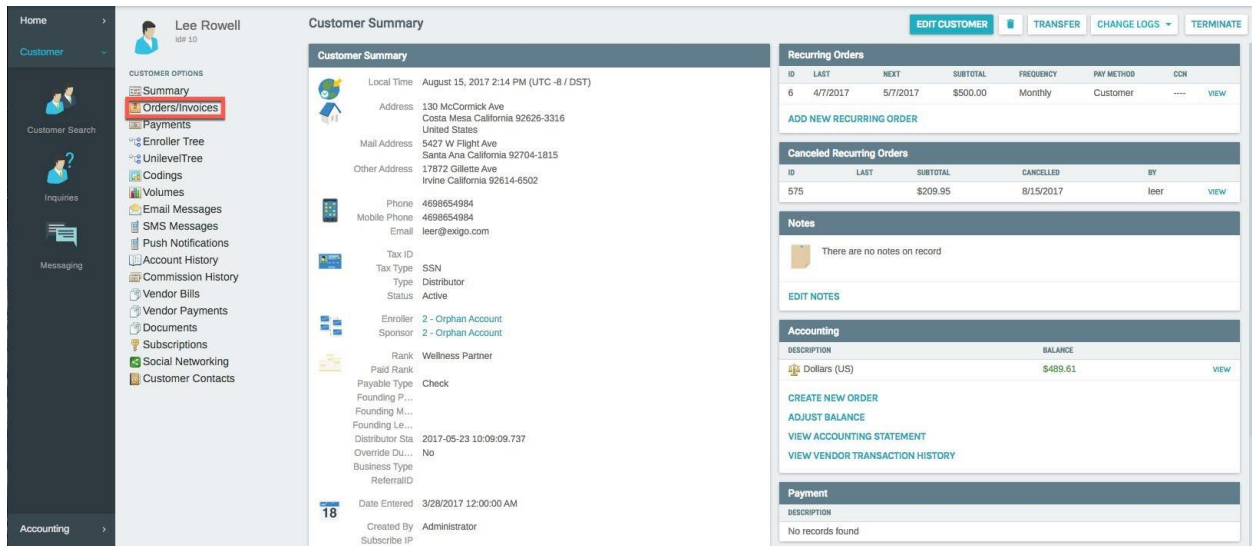
Mobile Phone: Mobile Phone Number of the Customer

Web Alias: Web Alias of the Customer

Tax ID: Tax ID of the Customer

And User Defined Fields created on the Customer Record

Once the Customer has been found, the following window (Customer Record) will be displayed:



Customer Summary

Local Time: August 15, 2017 2:14 PM (UTC -8 / DST)

Address: 130 McCormick Ave
Costa Mesa California 92626-3316
United States

Mail Address: 5427 W Flight Ave
Santa Ana California 92704-1815

Other Address: 17872 Gillette Ave
Irvine California 92614-6502

Phone: 4698654984
Mobile Phone: 4698654984
Email: leer@exigo.com

Tax ID: [Redacted]
Tax Type: SSN
Type: Distributor
Status: Active

Enroller: 2 - Orphan Account
Sponsor: 2 - Orphan Account

Rank: Wellness Partner

Paid Rank: [Redacted]
Payable Type: Check
Founding P...: [Redacted]
Founding M...: [Redacted]
Founding Le...: [Redacted]
Distributor Sta...: 2017-05-23 10:09:09.737
Override Du...: No
Business Type: ReferralID

Date Entered: 3/28/2017 12:00:00 AM
Created By: Administrator
Subscriber IP: [Redacted]

Recurring Orders

| ID | LAST | NEXT | SUBTOTAL | FREQUENCY | PMF METHOD | CCN | |
|----|----------|----------|----------|-----------|------------|------|------|
| 6 | 4/7/2017 | 5/7/2017 | \$500.00 | Monthly | Customer | ---- | VIEW |

ADD NEW RECURRING ORDER

Cancelled Recurring Orders

| ID | LAST | SUBTOTAL | CANCELLED | BY | |
|-----|------|----------|-----------|------|------|
| 575 | | \$209.95 | 8/15/2017 | leer | VIEW |

Notes

There are no notes on record

EDIT NOTES

Accounting

| DESCRIPTION | BALANCE | |
|--------------|----------|------|
| Dollars (US) | \$489.61 | VIEW |

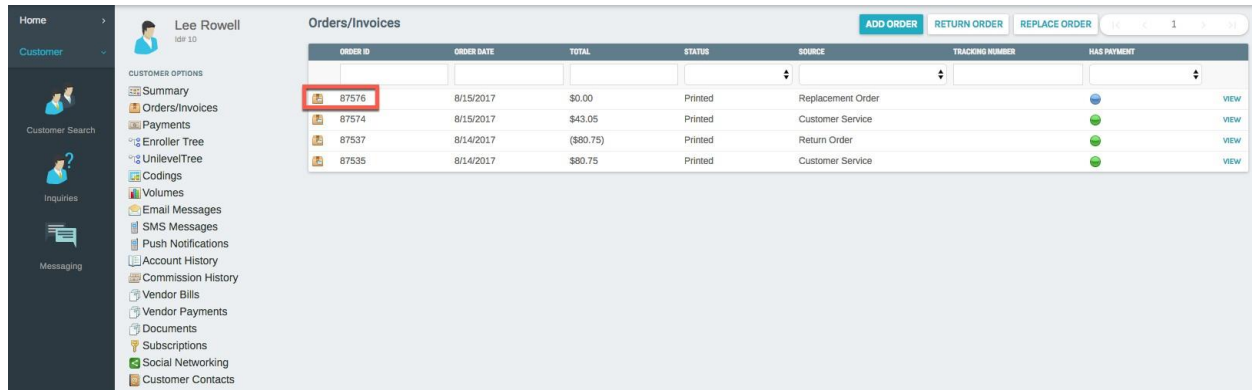
CREATE NEW ORDER
ADJUST BALANCE
VIEW ACCOUNTING STATEMENT
VIEW VENDOR TRANSACTION HISTORY

Payment

| DESCRIPTION | |
|------------------|--|
| No records found | |

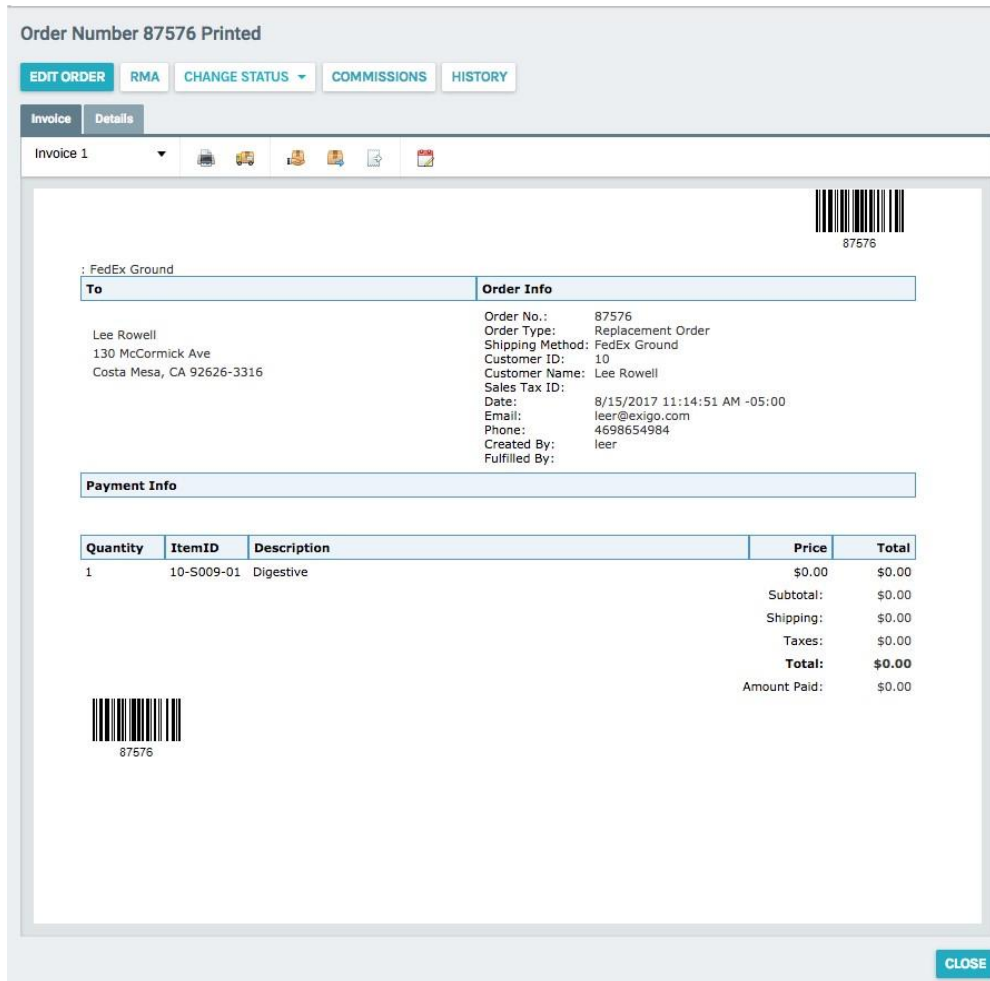
To show all Orders for this Customer, click on "Orders/Invoices"

Clicking on “Orders/Invoices” will display the following window:



| ORDER ID | ORDER DATE | TOTAL | STATUS | SOURCE | TRACKING NUMBER | HAS PAYMENT |
|----------|------------|-----------|---------|-------------------|-----------------|-------------|
| 87576 | 8/15/2017 | \$0.00 | Printed | Replacement Order | | |
| 87574 | 8/15/2017 | \$43.05 | Printed | Customer Service | | |
| 87537 | 8/14/2017 | (\$80.75) | Printed | Return Order | | |
| 87535 | 8/14/2017 | \$80.75 | Printed | Customer Service | | |

From this window, click on the appropriate Order ID. This will display the following window:



Order Number 87576 Printed

EDIT ORDER | RMA | CHANGE STATUS | COMMISSIONS | HISTORY

Invoice | Details

Invoice 1

FedEx Ground

| To | Order Info |
|--|--|
| Lee Rowell 130 McCormick Ave Costa Mesa, CA 92626-3316 | Order No.: 87576 Order Type: Replacement Order Shipping Method: FedEx Ground Customer ID: 10 Customer Name: Lee Rowell Sales Tax ID: Date: 8/15/2017 11:14:51 AM -05:00 Email: leer@exigo.com Phone: 4598654984 Created By: leer Fulfilled By: |

| Quantity | ItemID | Description | Price | Total |
|----------|------------|-------------|---------------|---------------|
| 1 | 10-S009-01 | Digestive | \$0.00 | \$0.00 |
| | | | Subtotal: | \$0.00 |
| | | | Shipping: | \$0.00 |
| | | | Taxes: | \$0.00 |
| | | | Total: | \$0.00 |
| | | | Amount Paid: | \$0.00 |

CLOSE

This concludes the training module on Order Search