



Order Management: Order Search

v 1.0

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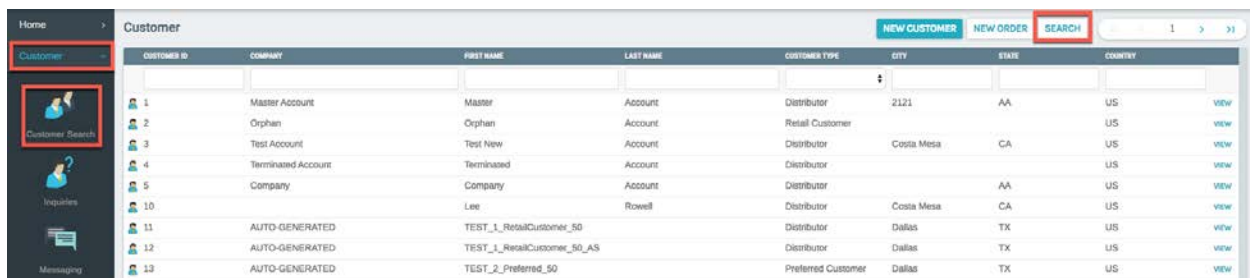
How to Search for an Order

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

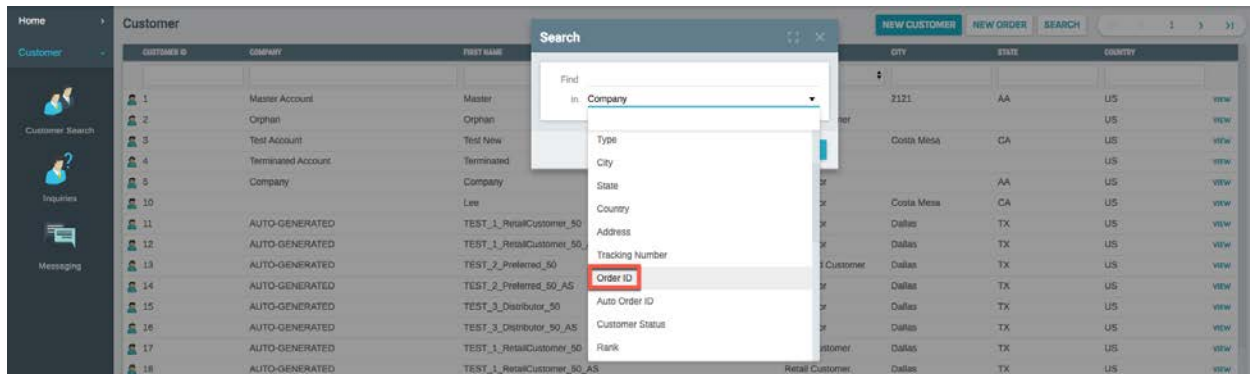
1. Search by Order ID
2. Search by Customer
- 3.

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. In order to start a Search, navigate to Customer > Customer Search > Search.



Clicking on "Search" will display the following window:



There are multiple fields from which to search.

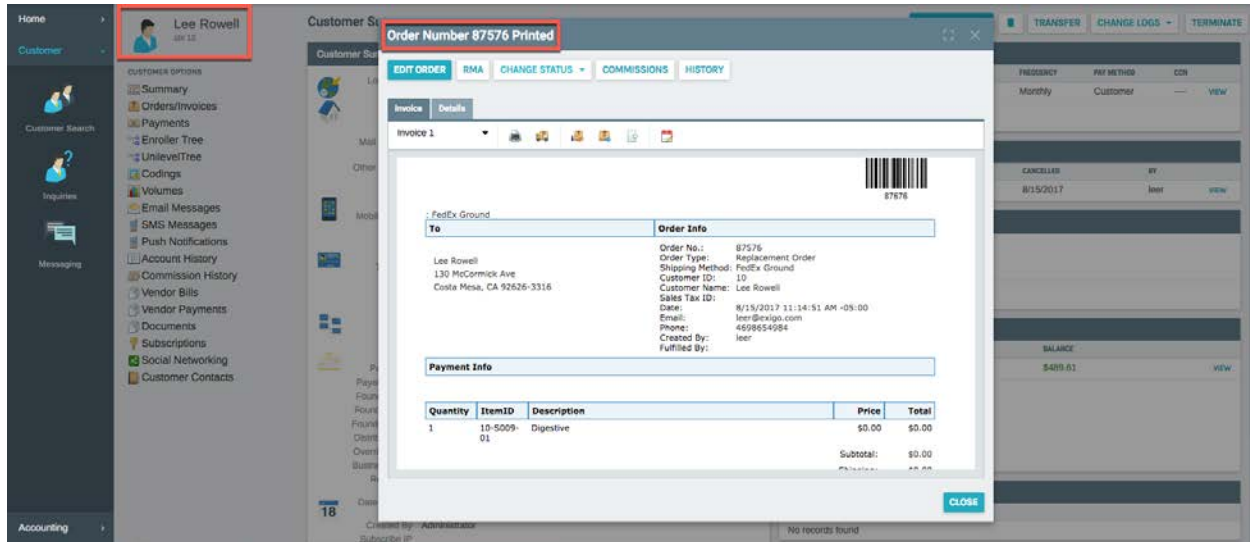
To Search for an Order ID, first click on the drop down for the "In" field and choose "OrderID".

Populate the "Find" field with the OrderID.

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 above.

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

CustomerID: 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

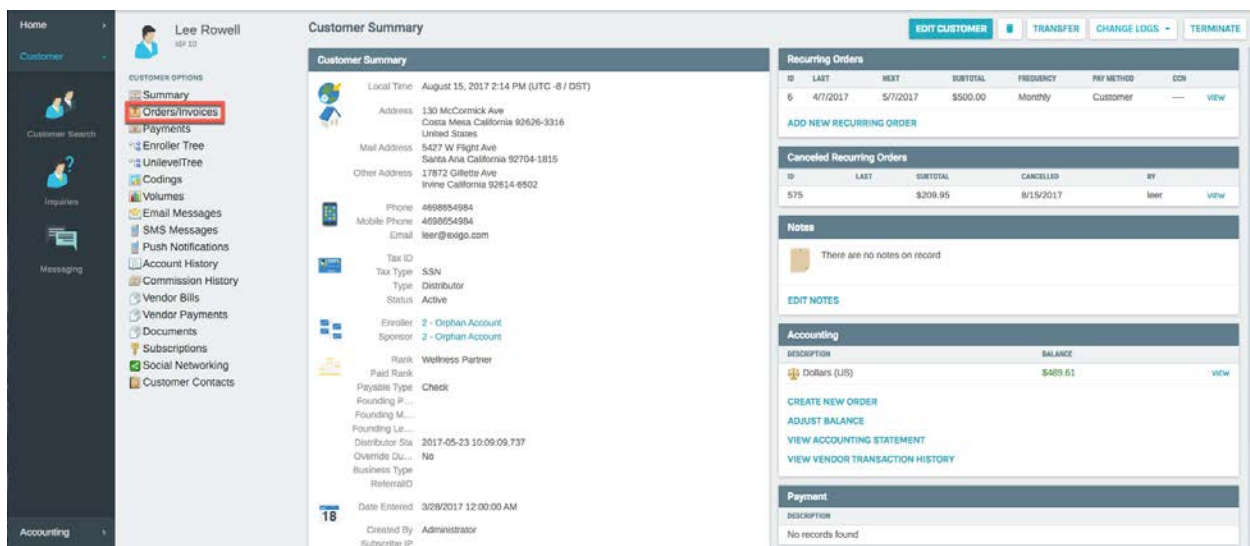
Mobile Phone: Mobile Phone Number of the Customer

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:



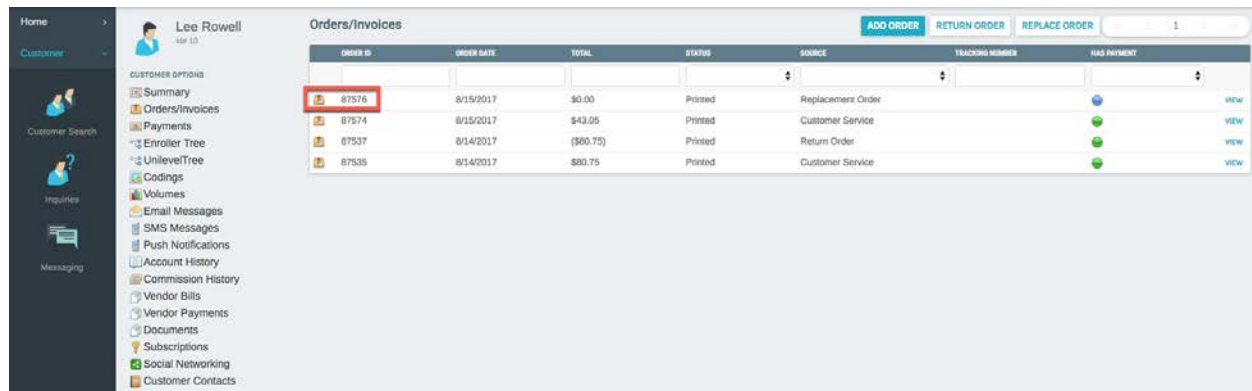
The screenshot shows the 'Customer Summary' page for Lee Rowell (ID: 18710). The interface includes a left-hand navigation menu with options like Summary, Orders/Invoices, Payments, and Enroller Tree. The main content area is divided into several sections:

- Customer Summary:** Displays local time (August 15, 2017 2:14 PM UTC -8 / DST), address (130 McCormick Ave, Costa Mesa, CA 92626-3316), mail address (5427 W Flight Ave, Santa Ana, CA 92704-1815), other address (17872 Gillette Ave, Irvine, CA 92614-6502), phone (4698854984), mobile phone (4698054584), email (leer@exigo.com), tax ID, tax type (SSN), tax type (Distributor), status (Active), enroller (2 - Orphan Account), sponsor (2 - Orphan Account), rank (Wellness Partner), paid rank, payable type (Check), founding #, founding m..., founding le..., distributor sta (2017-05-23 10:09:09.737), override du..., business type, referencID, date entered (3/28/2017 12:00:00 AM), created by (Administrator), and subscribe IP.
- Recurring Orders:** A table with columns: ID, LAST, NEXT, SUBTOTAL, FREQUENCY, PAY METHOD, CDR. One record is shown: ID 6, LAST 4/7/2017, NEXT 5/7/2017, SUBTOTAL \$500.00, FREQUENCY Monthly, PAY METHOD Customer, CDR ---. A 'VIEW' link is present for this record.
- Cancelled Recurring Orders:** A table with columns: ID, LAST, SUBTOTAL, CANCELLED, BY. One record is shown: ID 575, LAST ---, SUBTOTAL \$208.95, CANCELLED 8/15/2017, BY leer. A 'VIEW' link is present.
- Notes:** A section indicating 'There are no notes on record' with an 'EDIT NOTES' link.
- Accounting:** A table with columns: DESCRIPTION, BALANCE. One record is shown: Dollars (US), BALANCE \$489.61. A 'VIEW' link is present. Below this are links for 'CREATE NEW ORDER', 'ADJUST BALANCE', 'VIEW ACCOUNTING STATEMENT', and 'VIEW VENDOR TRANSACTION HISTORY'.
- Payment:** A section indicating 'No records found'.

At the top right of the main content area, there are buttons for 'EDIT CUSTOMER', 'TRANSFER', 'CHANGE LOGS', and 'TERMINATE'.

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

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



The screenshot shows the Exigo web interface. On the left is a navigation sidebar with options like Home, Customer Search, and Messaging. The main area is titled "Orders/Invoices" and contains a table with columns: ORDER ID, ORDER DATE, TOTAL, STATUS, SOURCE, TRACKING NUMBER, and HAS PAYMENT. The first row, with ORDER ID 87576, is highlighted with a red box. The table also includes buttons for "ADD ORDER", "RETURN ORDER", and "REPLACE ORDER" at the top right.







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	(\$60.75)	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      



87576

: 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:

Payment Info

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


87576

[CLOSE](#)

This concludes the training module on Order Search.