



# **Order Management: Processing Replacement Orders**

v 1.0

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## Processing Replacement Orders

This training module will focus specifically on processing Replacement Orders within Exigo. Replacement Orders are typically only processed via Exigo Admin (Exigo.com). A few things to understand about Replacement Orders:

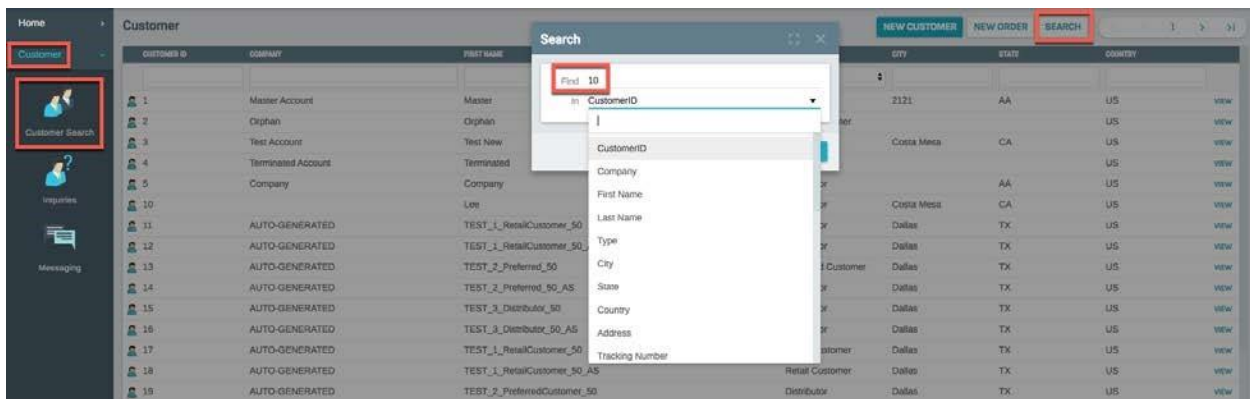
1. A Replacement Order in Exigo is a New Order with a New Order ID. The Replacement ID is tied to the Original Order ID in the Database for reporting purposes.
2. A Replacement will never show on the Original Order ID.

### How to process a replacement

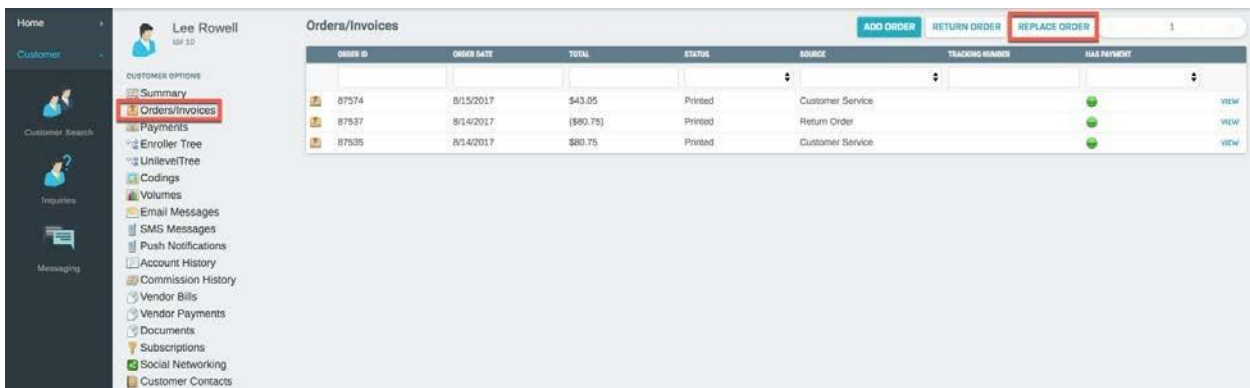
To process a replacement, locate the Order in Exigo. This may be done via the following process:

Click on Customer > Customer Search > Search

Enter the Customer ID in the 'Find' field.



After locating the Customer Record, click on "Orders/Invoices". This will display a list of all Orders for this Customer.



Clicking on "Replace Order" will display the following window. Enter the Order to be replaced and click on "Search".

**Pick Order** [Close] [Refresh]

Search by Order ID  [Dropdown] SEARCH

ORDER ID	NAME	TOTAL	ORDER DATE
8445	Joel, Test	10.82	3/2/2021

CLOSE

If the correct Order ID is found, click on the Order ID. This will open the following window to process a Replacement. The window will populate with all information from the Original Order.

Ensure all Tabs (Ship To, Items, Ship Method, and Payment) are complete prior to clicking on “Add Order”.

**Order Detail** [Close] [Refresh]

Ship To | 
 Items | 
 Ship Method | 
 Payment

Choose an address to Ship the Order to:

**Shipping Address**  
 Lee Rowell  
 130 McCormick Ave  
 Costa Mesa CA 92626-3316  
EDIT CHECK
Verified

**Mailing Address**  
 Lee Rowell  
 5427 W Flight Ave  
 Santa Ana CA 92704-1815  
EDIT CHECK

**Drop Ship Address**

Country United States

Company

First Name Lee

Last Name Rowell

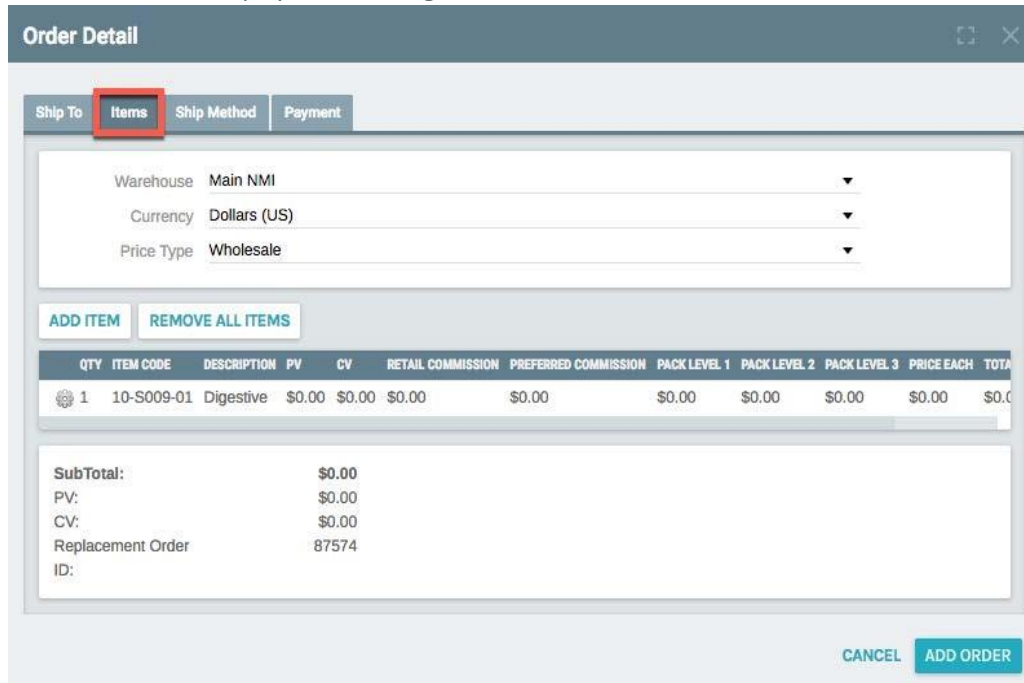
Address 130 McCormick Ave

City Costa Mesa California 92626-3316  
CHECK
Verified

CANCEL ADD ORDER

Choose the appropriate Ship To Address and Click on the Items Tab to move forward.

Clicking on the Items Tab will display the following window:



**Order Detail**

Ship To **Items** Ship Method Payment

Warehouse Main NMI  
 Currency Dollars (US)  
 Price Type Wholesale

ADD ITEM REMOVE ALL ITEMS

QTY	ITEM CODE	DESCRIPTION	PV	CV	RETAIL COMMISSION	PREFERRED COMMISSION	PACK LEVEL 1	PACK LEVEL 2	PACK LEVEL 3	PRICE EACH	TOTAL
1	10-S009-01	Digestive	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

SubTotal: \$0.00  
 PV: \$0.00  
 CV: \$0.00  
 Replacement Order ID: 87574

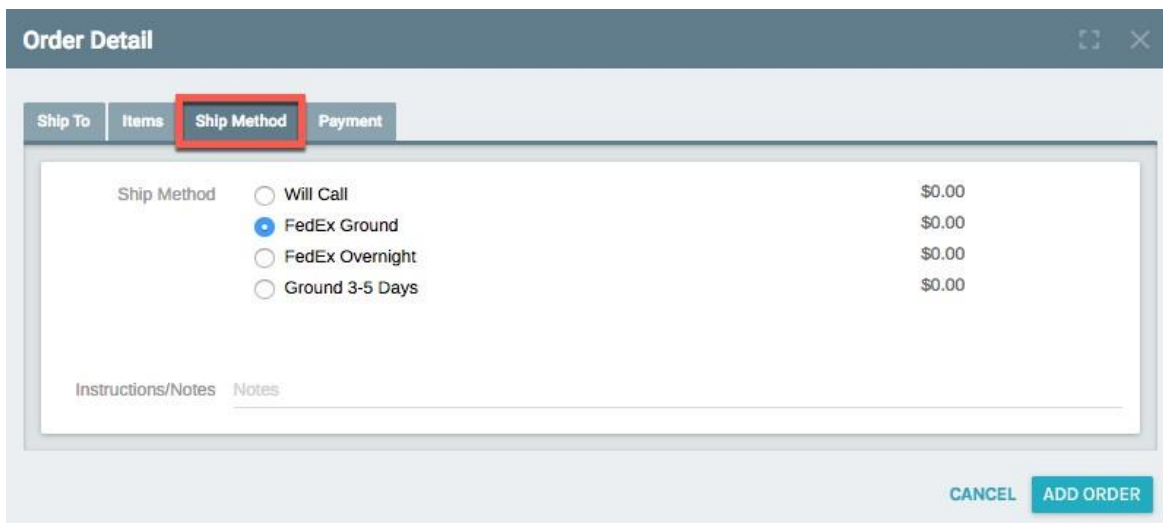
CANCEL ADD ORDER

Ensure that all information is correct. This is a free Replacement Order. All amounts should equal zero.

*NOTE: You may edit the items for partial replacements.*

To proceed click on the Ship Method Tab.

The following window will be displayed:



**Order Detail**

Ship To Items **Ship Method** Payment

Ship Method

- Will Call \$0.00
- FedEx Ground \$0.00
- FedEx Overnight \$0.00
- Ground 3-5 Days \$0.00

Instructions/Notes

CANCEL ADD ORDER

Choose the correct Ship Method and move forward by clicking on the Payment Tab.

Clicking on the Payment Tab will display the following window:

**Order Detail** ☰ ✕

Ship To
Items
Ship Method
Payment

ACCOUNT
SHIPPING
TAX
CHANGE STATUS

TYPE	ACCOUNT	AMOUNT
No payments yet		

SubTotal	\$0.00	Order Status	Accepted
Tax	\$0.00	Order Type	Replacement Order ▼
Manual Shipping	\$0.00	Order Date	8/15/2017 11:14:51 AM
<b>Total</b>	<b>\$0.00</b>	Last Modified	8/15/2017 11:15:00 AM -05:00
FreeCreditItem		Modified By	leer
ExtractorCalculate Date		Created By	leer
Transfer Order Volume To Customer ID		<input type="checkbox"/> <b>Supress packing slip price</b>	Do not display the price on the invoice
		<input type="checkbox"/> <b>Do not ship</b>	The invoice will be created manually

CANCEL
ADD ORDER

Click on "Add Order" to complete the Replacement Process. The following window will be displayed showing the Replacement Order Invoice.

Order Number 87576 Accepted
✖

EDIT ORDER
RMA
CHANGE STATUS ▾
COMMISSIONS
HISTORY

Invoice

Details

Invoice 1

Lee Rowell 130 McCormick Ave Costa Mesa, CA 92626-3316	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: 4698654984 Created By: leer Fulfilled By:
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**Payment Info**

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

CLOSE

As a final verification step, go back to the Customer Record and click on Orders/Invoices to ensure a Replacement Order displays.

Home

Customer

Customer Search

Inquiries

Lee Rowell  
SEP 10

CUSTOMER OPTIONS

- Summary
- Orders/Invoices
- Payments
- Enroller Tree
- UnilevelTree
- Codings
- Volumes
- Email Messages
- SMS Messages

ADD ORDER
RETURN ORDER
REPLACE ORDER
1

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

The Replacement Order Process is now complete.