Viewing Customer Information

v 1.0

Contents

Viewing Customer Information

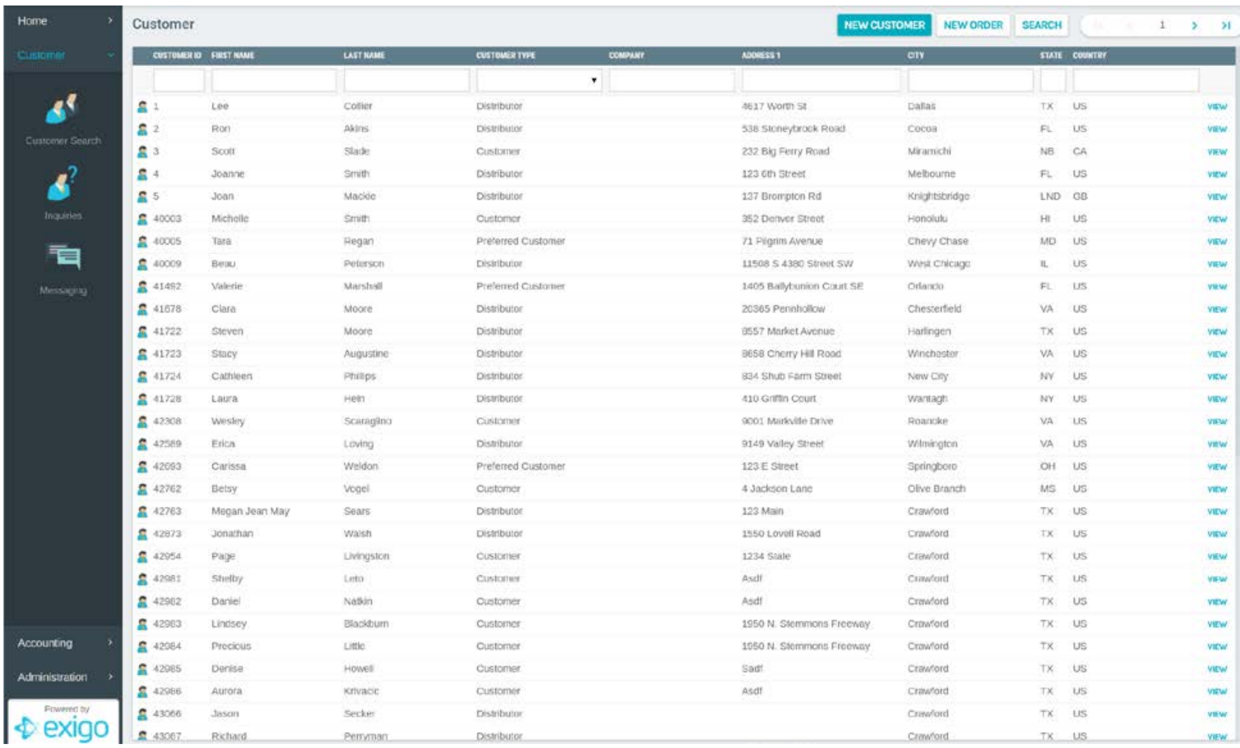
This training module focuses on Customer Data located inside Exigo.com. The following topics will be reviewed:

1. How to Search for a Customer
2. Summary Page
3. Orders/Invoices
4. Payments

*All other topics on the Customer Menu will be reviewed in future training modules.

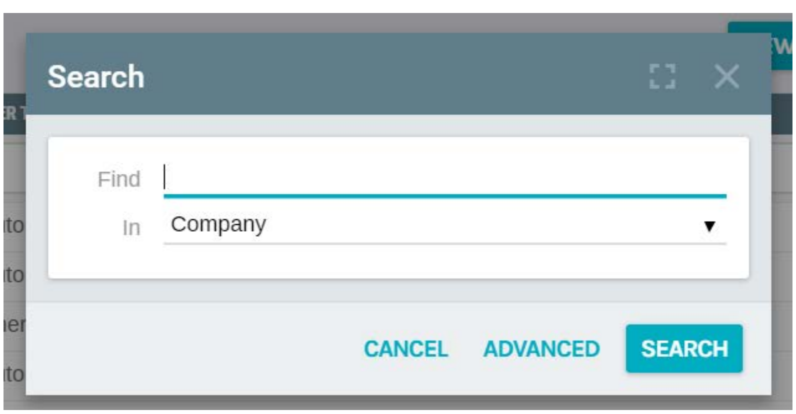
How to Search for a Customer

In order to search for a Customer, log in to Exigo.com and navigate to Customer > Customer Search. This will show the following window.



Click on “Search” in the upper right corner.

The following window will open:

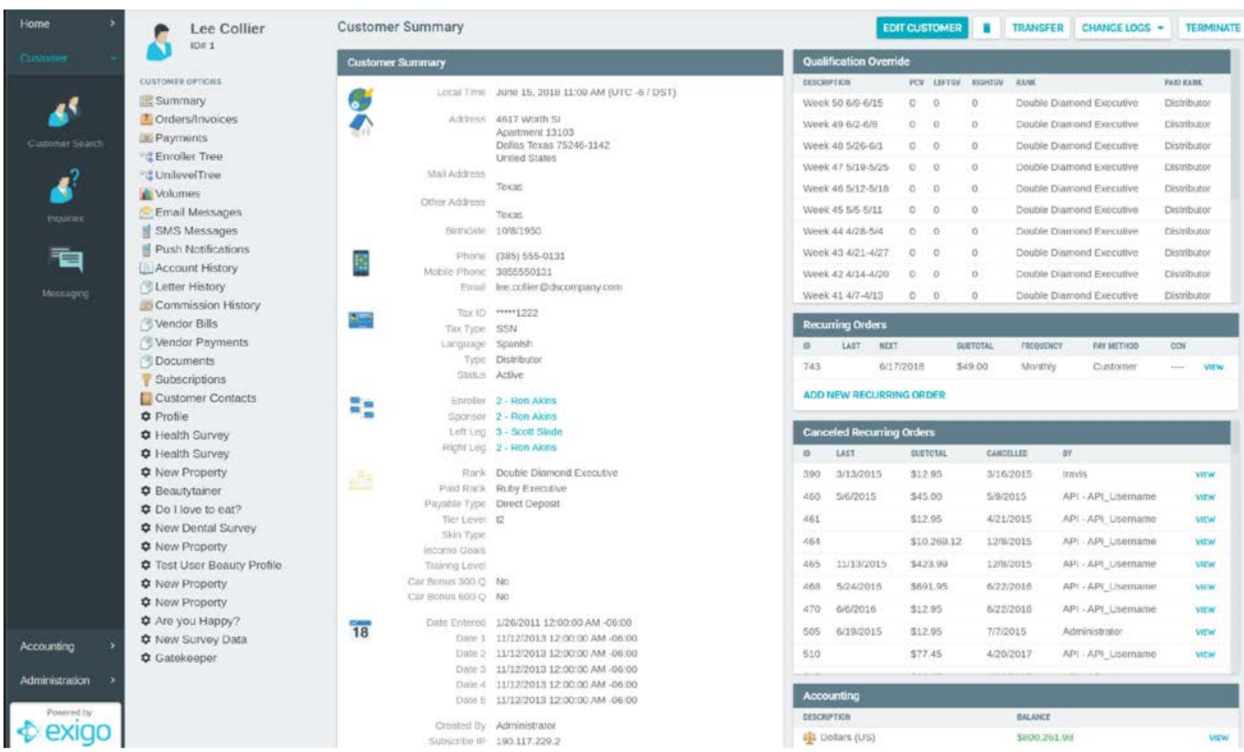


To complete a Search, enter the value for which you are searching in the Find Field. Exigo allows Customer Search based on values in the following fields:

Customer ID	Company
First Name	Last Name
Customer Type	City
State	Country
Address	Tracking Number
Order ID	Auto Order ID
Status	Rank
Entry Date	Email
Phone	Zip
Login Name	Web Alias
Tax ID	

Click "Search" when you have entered your value and chosen your field type.

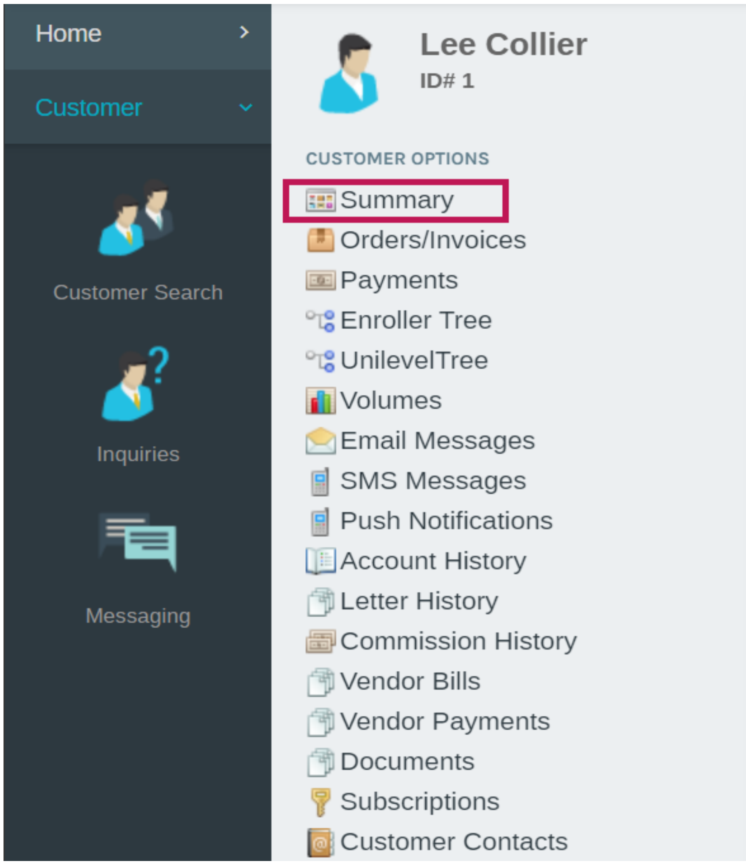
The following screen will be displayed.



This screen will be broken down into detail in the following pages.

Customer Summary

For a summary of the Customer's information, click on "Summary" in the Customer Options Menu shown below.



Clicking on Summary will show the following information in the middle section of the screen.

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CUSTOMER INFORMATION SECTION FIELDS

Local Time: Local Date and Time

Address: This is the Main Address entered at time of Customer creation.

Mail Address: If the Mail Address was entered at time of Customer creation, it will be shown here.

Birthdate: If Birthdate was entered at time of Customer creation, it will be shown here.

Phone: This is the main or day phone number for the Customer.

Mobile Phone: This is the mobile number for the Customer.

Email: This is the email for the Customer.

Tax ID: If entered at time of Customer creation, Tax ID will be displayed here.

Tax Type: If a Tax ID was entered at time of Customer creation, the Tax Type field identifies the specific kind of Tax ID entered.

Language: This is the primary language of the Customer.

Type: This is the Customer Type which drives pricing and commissions.

Status: This is the Customer Status which drives multiple areas of system functionality including the ability to place an Order and earn commissions.

Enroller: This will be discussed in more detail in future training modules. The Enroller is typically the Customer who referred or signed up the Customer. Required for all Customer Types.

Sponsor: This will be discussed in more detail in future training modules. The Sponsor is required for any Customer Type that can refer or sign up other Customers. This field may or may not be the same as the Enroller field.

Rank: This will be discussed in more detail in future training modules. This field is the Current Rank of the Customer.

Paid Rank: This will be discussed in more detail in future training modules. This field is the Rank at which the Customer will be paid commissions.

Payable Type: This field identifies how the Customer will be paid commissions.

Distributor ID – Other Address C: These are User Defined Fields at the Customer Level. Each of these fields is defined by the Client and may drive functionality within Exigo.

Date Entered: This is the Date and Time the Customer was created.

First Login: This is the Date and Time the Customer first logged in.

Created By: This field shows which User created the Customer. If this field shows a value such as "API_WEB", the Customer was created on the Web.

Subscribe IP: This is the last IP Address of the Customer.

Last Modified: This is the Date, Time, and Name of the User that made the last update to this Customer record.

Edit Customer – Terminate Customer: Will be covered in future training modules.

Login Fields

Login Name: This is the User Name used by the Customer to Log In to the Web Back Office.

Password: This is the Password used by the Customer to Log In to the Web Back Office.

*NOTE: If the Client chooses to utilized Silent Logins, the Login Name and Password will be replaced by a link to the Web Back Office.

Modify Login Details: This will be covered in future training modules.

Website Fields

Web Alias: This is used for the Customer's Replicated Site as an extension to the Client's URL: https://purecare.com/leerowell. Only Customer Types that can sell products should have information in this section.

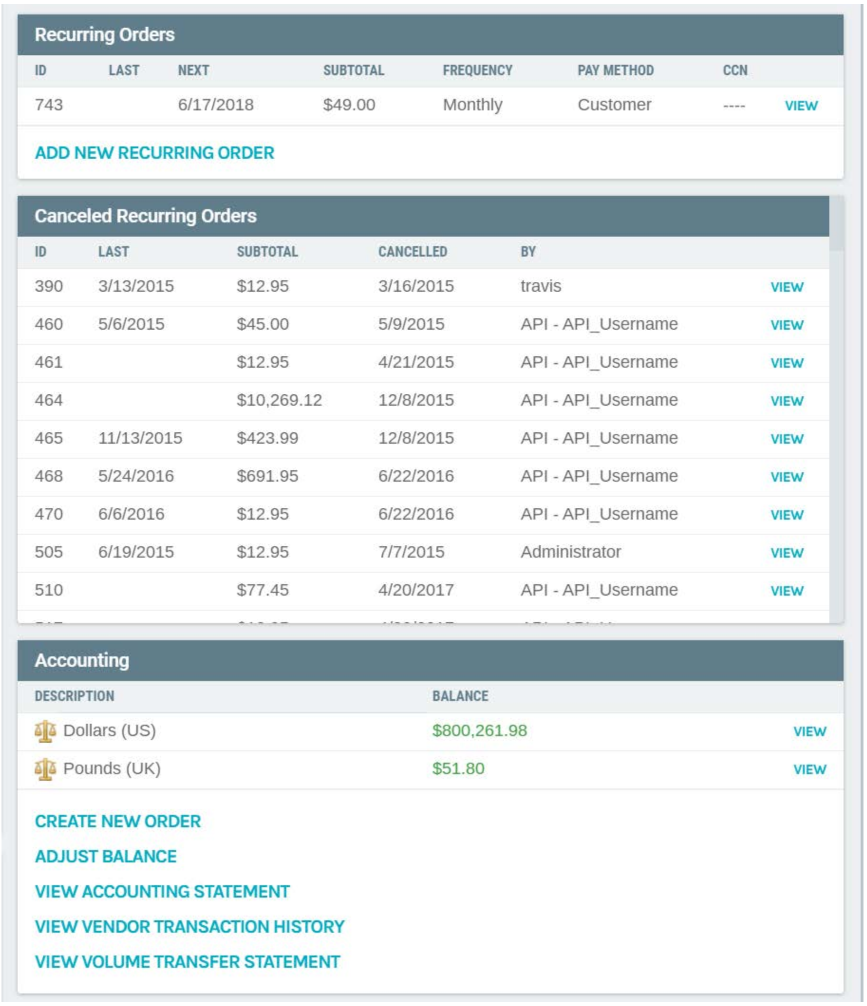
First Name: The First Name of the Customer as shown on the Customer's Replicated Site.

Last Name: The Last Name of the Customer as shown on the Customer's Replicated Site.

Email: The Customer's Email Address as shown on the Customer's Replicated Site.

Edit Web Info – Delete Web Info: This will be covered in future training modules.

The following fields are located on the right side of the Summary Page:



Recurring Orders

ID	LAST	NEXT	SUBTOTAL	FREQUENCY	PAY METHOD	CCN	
743		6/17/2018	$49.00	Monthly	Customer	----	VIEW

ADD NEW RECURRING ORDER

Canceled Recurring Orders

ID	LAST	SUBTOTAL	CANCELLED	BY	
390	3/13/2015	$12.95	3/16/2015	travis	VIEW
460	5/6/2015	$45.00	5/9/2015	API - API_Username	VIEW
461		$12.95	4/21/2015	API - API_Username	VIEW
464		$10,269.12	12/8/2015	API - API_Username	VIEW
465	11/13/2015	$423.99	12/8/2015	API - API_Username	VIEW
468	5/24/2016	$691.95	6/22/2016	API - API_Username	VIEW
470	6/6/2016	$12.95	6/22/2016	API - API_Username	VIEW
505	6/19/2015	$12.95	7/7/2015	Administrator	VIEW
510		$77.45	4/20/2017	API - API_Username	VIEW

Accounting

DESCRIPTION	BALANCE	
Dollars (US)	$800,261.98	VIEW
Pounds (UK)	$51.80	VIEW

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

Recurring Orders and Accounting will be covered in future training modules. The critical items when viewing Customer data are reviewed below.

Recurring Orders: This section shows how many Recurring Orders the Customer currently has set up. Note the Last Date the Recurring Order ran and the Next Date the Recurring Order will run.

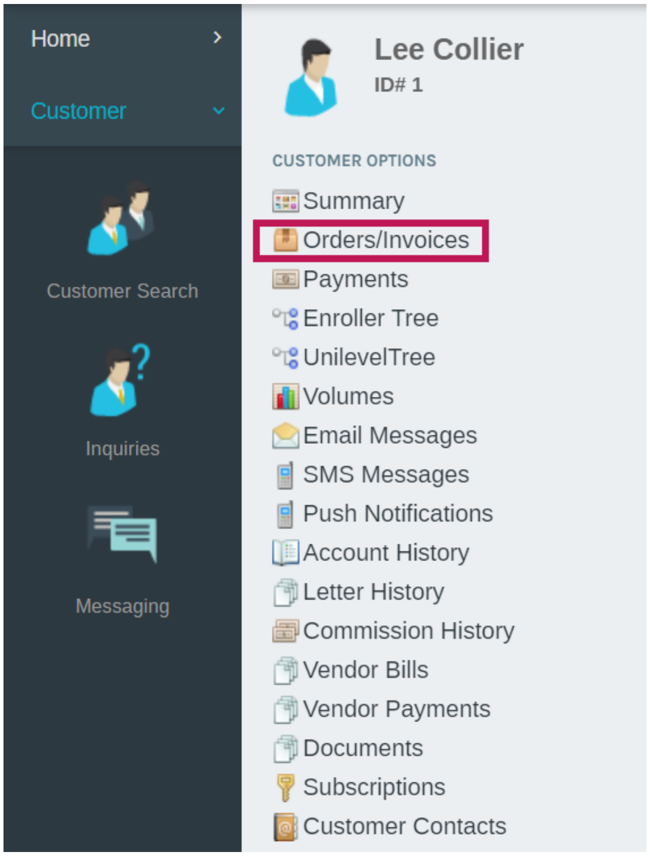
Notes: This section allows Customer Service Representatives to enter Notes related to the Customer. These Notes cannot be seen by the Customer.

Accounting: The most important feature to point out with this training module is the Balance on the Account. In this example, the Customer has a negative balance which will be used to pay for future Orders.

Orders/Invoices

Orders will be covered in detail in Order Management Training. This section will give a brief snapshot of the information available on the Customer Record.

Clicking on “Orders/Invoices” will open the screen below.



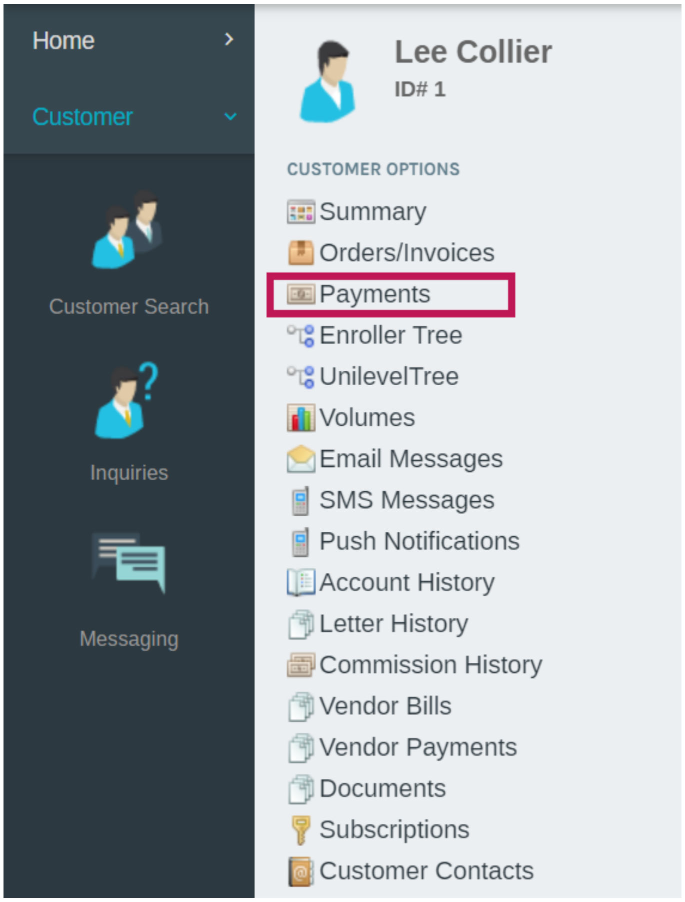
All Orders for this Customer are shown on the right side of the page. The basic information on the Order is shown here: OrderID, OrderDate, Total, StatusDescription, Source, etc. Even if an Order is Returned or Replaced, it will always be shown here unless deleted directly from the Database.

StatusDescription impacts other functionality within the system including Fulfillment.

Payments

Payments will be covered in detail in Order Management Training. This section will give a brief snapshot of the information available on the Customer Record. These Payments are related to Orders.

Clicking on "Payments" will open the screen below.



All Payments for this Customer are shown on the right side of the page. The basic information on the Payment is shown here: Payment ID, Payment Date, Currency, and Total.

All other Customer Options will be covered in future training modules:

Enroller Tree

Unilevel/Binary Tree

Codings

Volumes

Email Messages

SMS Messages

Account History

Commission History

Vendor Bills

Vendor Payments

Documents

Subscriptions

Social Networking

Customer Contacts