



Viewing Customer Information

v 1.1

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Viewing Customer Information

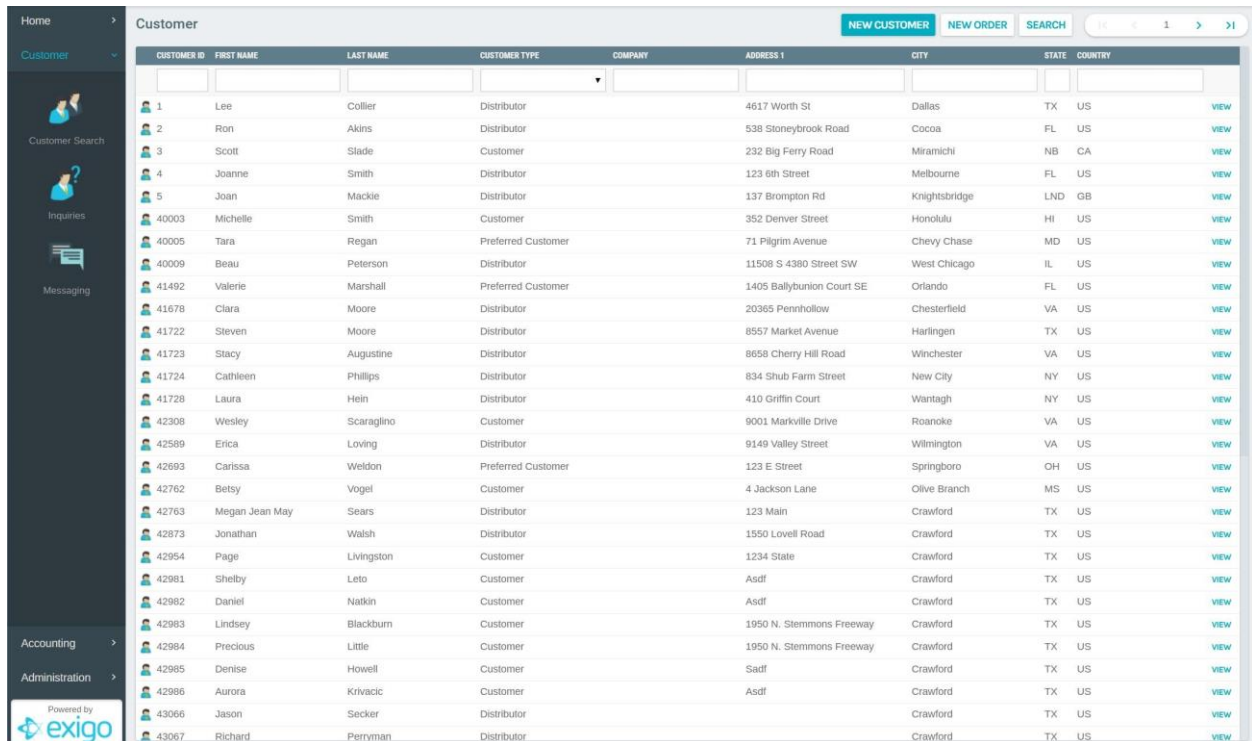
This training module focuses on Customer Data located in Exigo Admin. The following topics will be reviewed:

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

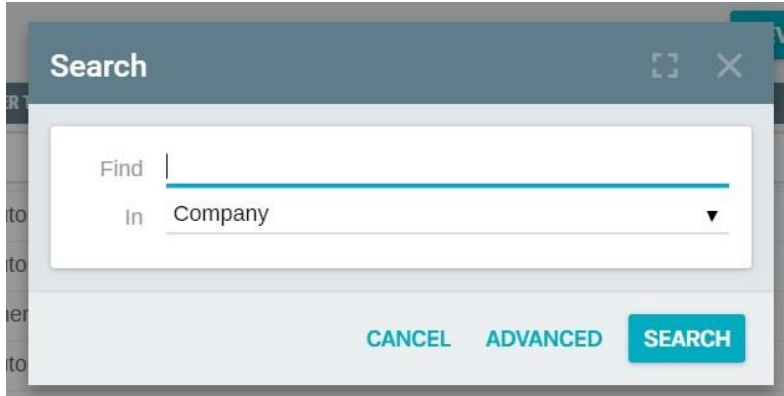
To search for a Customer, log in to Exigo.com and navigate to Customer > Customer Search. This will show the following window.



| CUSTOMER ID | FIRST NAME | LAST NAME | CUSTOMER TYPE | COMPANY | ADDRESS 1 | CITY | STATE | COUNTRY | |
|-------------|----------------|------------|--------------------|---------|---------------------------|---------------|-------|---------|------|
| 1 | Lee | Collier | Distributor | | 4617 Worth St | Dallas | TX | US | VIEW |
| 2 | Ron | Akins | Distributor | | 538 Stonybrook Road | Cocoa | FL | US | VIEW |
| 3 | Scott | Slade | Customer | | 232 Big Ferry Road | Miramichi | NB | CA | VIEW |
| 4 | Joanne | Smith | Distributor | | 123 8th Street | Melbourne | FL | US | VIEW |
| 5 | Joan | Mackie | Distributor | | 137 Brompton Rd | Knightsbridge | LND | GB | VIEW |
| 40003 | Michelle | Smith | Customer | | 352 Denver Street | Honolulu | HI | US | VIEW |
| 40005 | Tara | Regan | Preferred Customer | | 71 Pilgrim Avenue | Chevy Chase | MD | US | VIEW |
| 40009 | Beau | Peterson | Distributor | | 11508 S 4380 Street SW | West Chicago | IL | US | VIEW |
| 41492 | Valerie | Marshall | Preferred Customer | | 1405 Ballybunion Court SE | Orlando | FL | US | VIEW |
| 41678 | Clara | Moore | Distributor | | 20365 Pennhollow | Chesterfield | VA | US | VIEW |
| 41722 | Steven | Moore | Distributor | | 8557 Market Avenue | Harlingen | TX | US | VIEW |
| 41723 | Stacy | Augustine | Distributor | | 8658 Cherry Hill Road | Winchester | VA | US | VIEW |
| 41724 | Cathleen | Phillips | Distributor | | 834 Shub Farm Street | New City | NY | US | VIEW |
| 41728 | Laura | Hein | Distributor | | 410 Griffin Court | Wantage | NY | US | VIEW |
| 42308 | Wesley | Scaraglino | Customer | | 9001 Markville Drive | Roanoke | VA | US | VIEW |
| 42589 | Erica | Loving | Distributor | | 9149 Valley Street | Wilmington | VA | US | VIEW |
| 42693 | Carissa | Weldon | Preferred Customer | | 123 E Street | Springboro | OH | US | VIEW |
| 42762 | Betsy | Vogel | Customer | | 4 Jackson Lane | Olive Branch | MS | US | VIEW |
| 42763 | Megan Jean May | Sears | Distributor | | 123 Main | Crawford | TX | US | VIEW |
| 42873 | Jonathan | Walsh | Distributor | | 1550 Lovell Road | Crawford | TX | US | VIEW |
| 42954 | Page | Livingston | Customer | | 1234 State | Crawford | TX | US | VIEW |
| 42981 | Shelby | Leto | Customer | | Asdf | Crawford | TX | US | VIEW |
| 42982 | Daniel | Natkin | Customer | | Asdf | Crawford | TX | US | VIEW |
| 42983 | Lindsey | Blackburn | Customer | | 1950 N. Stemmons Freeway | Crawford | TX | US | VIEW |
| 42984 | Precious | Little | Customer | | 1950 N. Stemmons Freeway | Crawford | TX | US | VIEW |
| 42985 | Denise | Howell | Customer | | Sadf | Crawford | TX | US | VIEW |
| 42986 | Aurora | Krivacic | Customer | | Asdf | Crawford | TX | US | VIEW |
| 43066 | Jason | Secker | Distributor | | | Crawford | TX | US | VIEW |
| 43067 | Richard | Perryman | Distributor | | | Crawford | TX | US | VIEW |

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 |
| Customer Status | Rank |
| Entry Date | Email |
| Phone | Zip |
| Login Name | Web Alias |
| Tax ID | User Defined Fields |

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

If there are more than one Customer ID's that meet the criteria provided, then a list of Customers will be shown that you can select from.

After selecting a user from the list shown you will be redirected to the Customer Summary screen.

If only one Customer meets the criteria for your search, then you will be redirected to the Customer Summary screen automatically.

Customer Summary

Local Time: June 15, 2018 11:09 AM (UTC -6 / DST)

Address: 4617 Worth St, Apartment 13103, Dallas, Texas 75246-1142, United States

Mail Address: Texas

Other Address: Texas

Birthdate: 10/8/1990

Phone: (381) 955-0131

Mobile Phone: 3855550131

Email: lee.collier@dscompany.com

Tax ID: *****1222

Tax Type: SSN

Language: Spanish

Type: Distributor

Status: Active

Enroller: 2 - Ron Atkins

Sponsor: 2 - Ron Atkins

Left Leg: 3 - Scott Slade

Right Leg: 2 - Ron Atkins

Rank: Double Diamond Executive

Paid Rank: Ruby Executive

Payable Type: Direct Deposit

Tier Level: I2

Skin Type: Income Goals

Training Level: Car Bonus 300 Q: No, Car Bonus 600 Q: No

Date Entered: 1/28/2011 12:00:00 AM -06:00

Date 1: 11/12/2013 12:00:00 AM -06:00

Date 2: 11/12/2013 12:00:00 AM -06:00

Date 3: 11/12/2013 12:00:00 AM -06:00

Date 4: 11/12/2013 12:00:00 AM -06:00

Date 5: 11/12/2013 12:00:00 AM -06:00

Created By: Administrator

Subscriber ID: 190.117.229.2

| RECEPTION | FCV | LEFTSV | RIGHTSV | RANK | Paid RANK |
|-------------------|-----|--------|---------|--------------------------|-------------|
| Week 50 6/9-6/15 | 0 | 0 | 0 | Double Diamond Executive | Distributor |
| Week 49 6/2-6/8 | 0 | 0 | 0 | Double Diamond Executive | Distributor |
| Week 48 5/26-6/1 | 0 | 0 | 0 | Double Diamond Executive | Distributor |
| Week 47 5/19-5/25 | 0 | 0 | 0 | Double Diamond Executive | Distributor |
| Week 46 5/12-5/18 | 0 | 0 | 0 | Double Diamond Executive | Distributor |
| Week 45 5/5-5/11 | 0 | 0 | 0 | Double Diamond Executive | Distributor |
| Week 44 4/28-5/4 | 0 | 0 | 0 | Double Diamond Executive | Distributor |
| Week 43 4/21-4/27 | 0 | 0 | 0 | Double Diamond Executive | Distributor |
| Week 42 4/14-4/20 | 0 | 0 | 0 | Double Diamond Executive | Distributor |
| Week 41 4/7-4/13 | 0 | 0 | 0 | Double Diamond Executive | Distributor |

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

| ID | LAST | SUBTOTAL | CANCELLER | BY |
|-----|------------|-------------|-----------|--------------------|
| 390 | 3/13/2015 | \$12.95 | 3/16/2015 | travis |
| 460 | 5/6/2015 | \$45.00 | 5/9/2015 | API - API_Username |
| 461 | | \$12.95 | 4/21/2015 | API - API_Username |
| 464 | | \$10,269.12 | 12/8/2015 | API - API_Username |
| 465 | 11/13/2015 | \$423.99 | 12/8/2015 | API - API_Username |
| 468 | 5/24/2016 | \$691.95 | 6/22/2016 | API - API_Username |
| 470 | 6/6/2016 | \$12.95 | 6/22/2016 | API - API_Username |
| 505 | 6/18/2015 | \$12.95 | 7/7/2015 | Administrator |
| 510 | | \$77.45 | 4/20/2017 | API - API_Username |

| DESCRIPTION | BALANCE |
|--------------|--------------|
| Dollars (US) | \$800,261.88 |

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 and you will be shown the page below.

Customer Summary

Local Time: December 10, 2020 9:02 AM (UTC -6)

Address: 352 Denver Street Ste 300, Crawford TX 76638, United States

Mail Address: 4004 Bellvue Rd, De Nue Strip, Suite 112, Crawford TX 76638

Other Address: Crawford TX 76638

Birthdate: 3/9/1973

Phone: 855-555-5555

Email: CorpTest@ExigoDemo.com

Tax ID: 123-45-6789

Tax Type: SSN

Language: English

Type: Distributor

Status: Active

Enroller: 2 - Ron Atkins

Binary Parent: 2 - Ron Atkins

Placement: Left

Placement Preference: Least Volume Leg Outside

Binary Holding Tank: No

Paid Rank: Ruby Executive

Payable Type: Direct Deposit

Car Applicant: No

Car Bonus Qual: No

Pack Purchase: Extra Ref: 0

Date Entered: 1/28/2011 1:20:00 PM -06:00

Created By: Administrator

Subscriber ID: 121.8.8.1

Last Modified: 12/10/2020 9:02:47 AM -06:00

Created By: Administrator

Subscriber ID: 190.117.229.2

| ID | LAST | NEXT | SUBTOTAL | FREQUENCY | PAY METHOD | CCN |
|----|------|-----------|----------|-----------|------------|------|
| 34 | | 1/10/2021 | \$250.00 | Monthly | Primary | ---- |

| ID | LAST | SUBTOTAL | CANCELLER | BY |
|----|----------|----------|-----------|------|
| 33 | 7/9/2019 | \$20.00 | 1/5/2001 | view |

Notes: This note 1

| DESCRIPTION | BALANCE |
|--------------|-----------|
| Dollars (US) | \$ 259.62 |
| Japan Yen | ¥ 00.00 |

CREATE NEW ORDER

ADJUST BALANCE

VIEW ACCOUNTING STATEMENT

VIEW VENDOR TRANSACTION HISTORY

VIEW VOLUME TRANSFER STATEMENT

Payment

No records found

CREATE PAYMENT CARD

MANUALLY ENTER PAYMENT CARD RECORD

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

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: Typically the Customer who referred or signed up the Customer. Required for all Customer Types.

Sponsor: 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: The Current Rank of the Customer. The value shown will always be the Highest Rank the Customer has achieved for a finalized period. This is commonly referred to as Highest Achieved Rank or Title Rank.

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. The field generally shows the Paid Rank for the last Accepted and Finalized pay period.

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

Co-Applicant – Extra Field: 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.

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

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

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

Page Header Buttons

Located at the top right of the Customer Summary page, this section contains various buttons that aid you in completing specific actions. Edit Customer – Terminate Customer will be covered in more detail in future training modules.



New Customer: This opens a window/modal used to create a new Customer. This will be covered in a separate training document.

Edit Customer: This opens a window/modal used to edit the Customer information for the Customer you are viewing. This will be covered in a separate training document.

Delete Customer (trashcan icon): This opens a window/modal used to edit the Customer information for the Customer you are viewing. You will be asked to confirm you want to make the change. This cannot be reversed and should be used with caution.

Change Logs: You can select either Customer or Account. The Customer Change Log shows a history of general changes made on the account. The Account Change Log shows a history of changes made to payment information in the account.

Terminate Customer: This opens a window/modal used to Terminate the Customer account based on preconfigured settings. This will be covered in a separate training document.

Login

This section is used to manage the Login information for the Customer.

A screenshot of a 'Login' form. It has a dark blue header with the word 'Login'. Below the header, there is a dark grey button with a white minus sign. To the right of the button, the text 'Login Name test' and 'Password password' is displayed. At the bottom left of the form, there is a blue link that says 'EDIT LOGIN'.

Login Name: This is the Username used by the Customer to login to the Web Back Office.

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

Edit Login: This is used to edit the login information for the user.

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

Website

Website



Web Alias test
 First Name Carmen
 Last Name Smith
 Email CorpTest@ExigoDemo.com

[EDIT WEB INFO](#)
[CHANGE LOG](#)
[DELETE](#)

Web Alias: This is used for the Customer’s Replicated Site as an extension to the Client’s URL.

Example: <https://bellezzabeauty.net/test>

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: This is used to edit Website information for a Customer.

Change Log: This is used to view changes made to the website information for a Customer.

Delete Web Info: This is used to delete the web information for the Customer.

Recurring Orders

How to create and cancel Recurring Orders will be covered in future training modules, for now we can see client’s current recurring orders. The critical items when viewing Customer data are reviewed below.

| Recurring Orders | | | | | | | |
|---|------|-----------|----------|-----------|------------|------|----------------------|
| ID | LAST | NEXT | SUBTOTAL | FREQUENCY | PAY METHOD | CCN | |
| 34 | | 1/10/2021 | \$250.00 | Monthly | Primary | ---- | VIEW |
| ADD NEW RECURRING ORDER | | | | | | | |

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.

Section A recurring order may be cancelled by clicking View > Delete Recurring order (Red X icon).

Cancelled Recurring Orders


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

| Cancelled Recurring Orders | | | | |
|----------------------------|----------|----------|-----------|----------------------|
| ID | LAST | SUBTOTAL | CANCELLED | BY |
| 33 | 7/9/2019 | \$20.00 | 1/1/0001 | VIEW |

Cancelled Recurring Orders: This section shows how many Recurring Orders the Customer currently has set up. Note the Last Date the Recurring Order ran is the Date the Recurring Order was cancelled.

A cancelled Recurring Order may be restored to Active by clicking View > Restore Recurring Order.



Notes

| Notes | |
|---|-------------|
|  | This note 1 |
| EDIT NOTES | |

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

Accounting

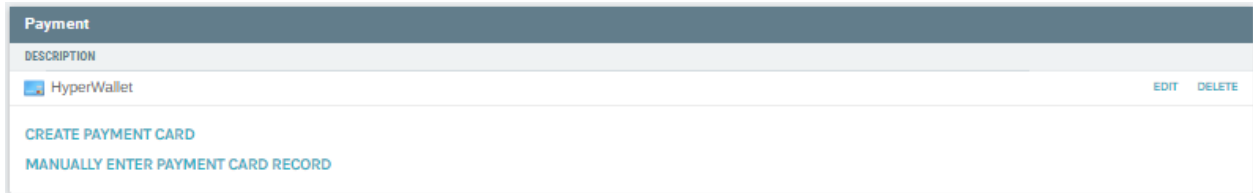
Accounting will be covered in future training modules. The critical items when viewing the Accounting section data are reviewed below.

| Accounting | |
|--|--------------------------------|
| DESCRIPTION | BALANCE |
|  Dollars (US) | \$ 259.62 VIEW |
|  Japan Yen | ¥ 60.00 VIEW |
| CREATE NEW ORDER | |
| ADJUST BALANCE | |
| VIEW ACCOUNTING STATEMENT | |
| VIEW VENDOR TRANSACTION HISTORY | |
| VIEW VOLUME TRANSFER STATEMENT | |

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 balance which will be used to pay for future Orders.

Payment

The Payment section will be covered in future training modules. The critical items when viewing the Accounting section data are reviewed below.



Payment: The most important feature to point out with this module is the Ability to create Payment Cards on the Account.

In this example, the user has a Hyper Wallet payment card. Depending on the specific Client configuration, this payment card account can be configured to pay for orders being placed, the destination where Commissions are paid to during the Payout process, or both.

From here you can View, Create, Edit, or Delete payment card information.

Orders/Invoices

Orders are covered in more 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.



| ORDER ID | ORDER DATE | TOTAL | STATUS | SOURCE | TRACKING NUMBER | HAS PAYMENT |
|----------|------------|----------|----------|------------------|-----------------|-------------|
| 249 | 6/14/2018 | \$0.00 | Printed | Customer Service | | VIEW |
| 248 | 6/14/2018 | \$0.00 | Printed | Customer Service | | VIEW |
| 247 | 6/14/2018 | \$0.00 | Accepted | Customer Service | | VIEW |
| 246 | 6/14/2018 | \$0.00 | Accepted | Customer Service | | VIEW |
| 245 | 6/14/2018 | \$7.54 | Printed | Customer Service | | VIEW |
| 244 | 6/14/2018 | \$0.00 | Printed | Customer Service | | VIEW |
| 235 | 8/7/2017 | \$0.00 | Printed | Recurring Order | | VIEW |
| 219 | 5/8/2017 | \$846.07 | Pending | Customer Service | | VIEW |
| 190 | 10/21/2016 | \$13.95 | Accepted | Customer Service | | VIEW |
| 189 | 10/21/2016 | \$13.95 | Accepted | Customer Service | | VIEW |

The basic information on all Orders for this customer is shown here: OrderID, OrderDate, Total, StatusDescription, and Source. 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 are covered in more 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.



The screenshot shows a web interface titled "Payments". At the top right, there is a pagination control showing "1" of 1 items. Below this is a table with the following columns: PAYMENT ID, PAYMENT DATE, CURRENCY, CHECK NUMBER, and TOTAL. The table contains one row with the following data: Payment ID 2, Payment Date 2/1/2016, Currency USD, and Total \$110.95. There is a "view" link next to the total amount.

| PAYMENT ID | PAYMENT DATE | CURRENCY | CHECK NUMBER | TOTAL |
|------------|--------------|----------|--------------|-------------------------------|
| 2 | 2/1/2016 | USD | | \$110.95 view |

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

Documents

Subscriptions

Social Networking

Customer Contacts