Viewing Customer Information

v 1.1

Contents

Viewing Customer Information

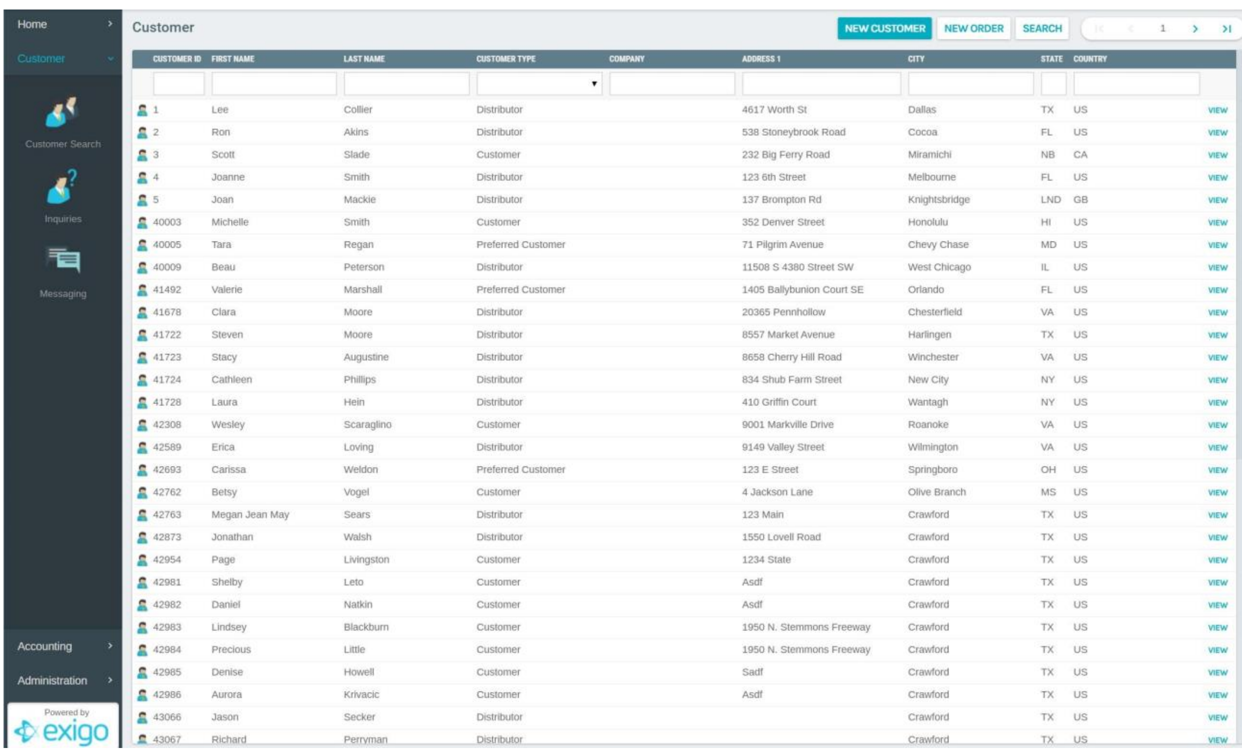
This training module focuses on Customer Data located in Exigo Admin. The following topics will be reviewed:

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.

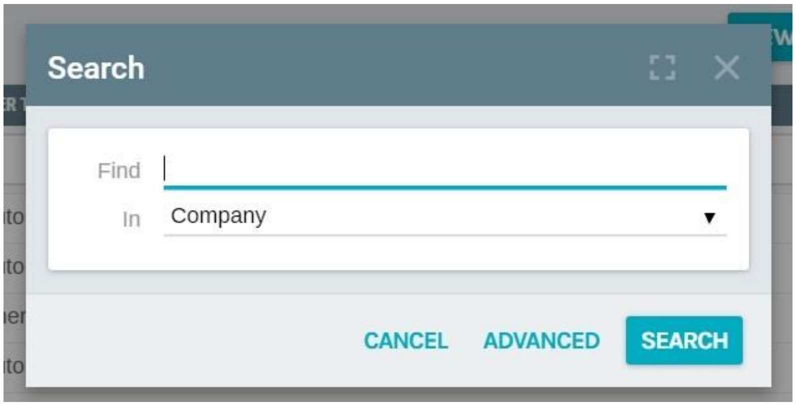
How to Search for a Customer

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



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:

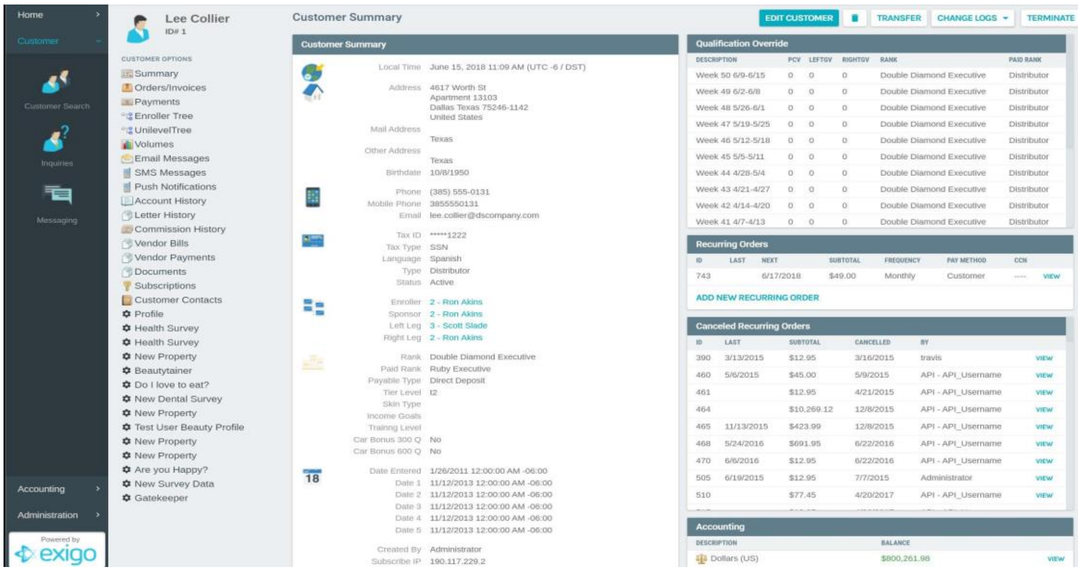
Customer ID	Company
First Name	Last Name
Customer Type	City
State	Country
Address	Tracking Number
Order ID	Auto Order ID
Customer Status	Rank
Entry Date	Email
Phone	Zip
Login Name	Web Alias
Tax ID	User Defined Fields

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.

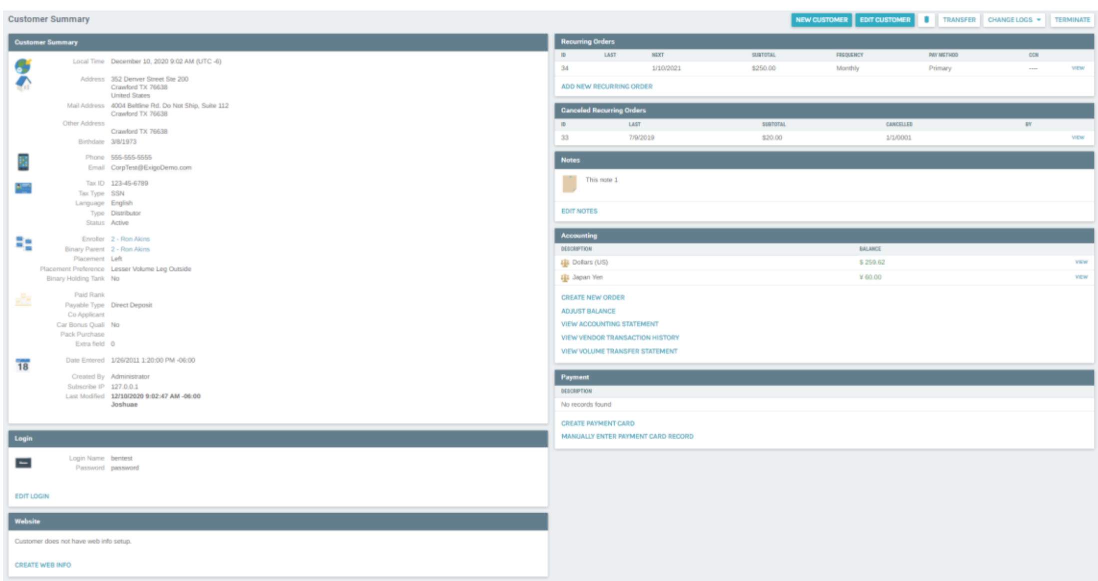
If only one Customer meets the criteria for your search, then you will be redirected to the Customer Summary screen automatically.



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.



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.

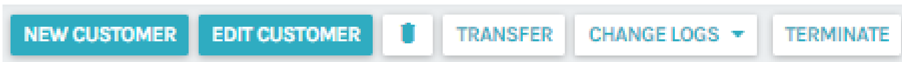
Created By: This field shows which User created the Customer. If this field shows a value such as "API_WEB", the Customer was likely created on the Web.

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.

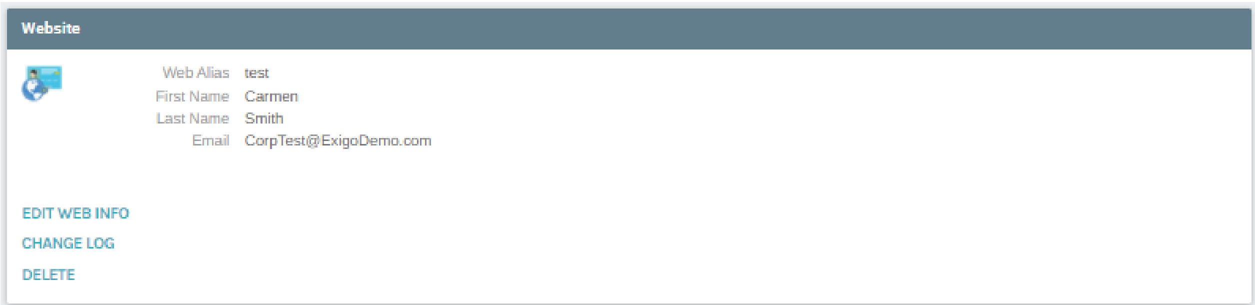
Login Name: This is the Username used by the Customer to login to the Web Back Office.

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.

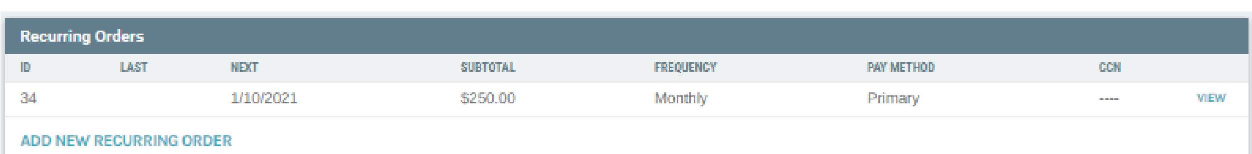
Edit Web Info: This is used to edit Website information for a Customer.

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.

Canceled 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

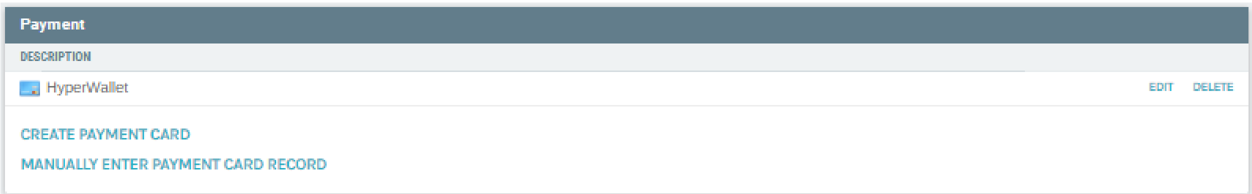
Accounting will be covered in future training modules. The critical items when viewing the Accounting section data are reviewed below.

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.

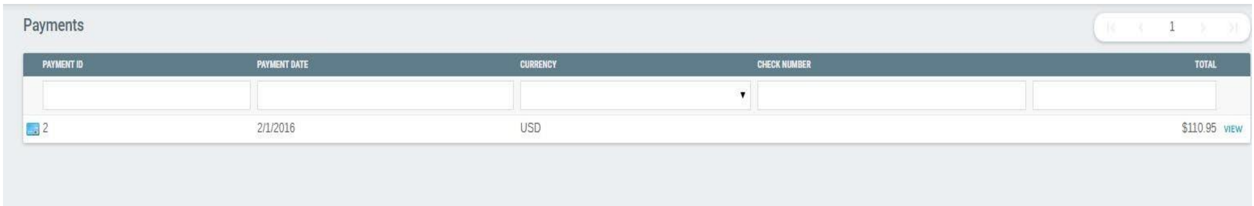
The basic information on all Orders for this customer is shown here: OrderID, OrderDate, Total, StatusDescription, and Source. Even if an Order is Returned or Replaced, it will always be shown here unless deleted directly from the Database.

**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 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