



Viewing Customer Information

v 1.0

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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.

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		536 Skoneybrook Road	Cocoa	FL	US	VIEW
3	Scott	Slade	Customer		232 Big Ferry Road	Miramichi	NB	CA	VIEW
4	Joanne	Smith	Distributor		123 6th 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	Beriu	Peterson	Distributor		11508 S 4380 Street SW	West Chicago	IL	US	VIEW
41482	Valerie	Marshall	Preferred Customer		1405 Ballyunion Court SE	Orlando	FL	US	VIEW
41678	Clara	Moore	Distributor		20365 Penhollo	Cheserfield	VA	US	VIEW
41722	Steven	Moore	Distributor		3557 Market Avenue	Harlingen	TX	US	VIEW
41723	Stacy	Augustine	Distributor		9658 Cherry Hill Road	Winchester	VA	US	VIEW
41724	Cathleen	Philips	Distributor		834 Shub Farm Street	New City	NY	US	VIEW
41728	Laura	Hiett	Distributor		410 Griffin Court	Waukegan	NY	US	VIEW
42308	Wesley	Sciarigino	Customer		9001 Markville Drive	Roanoke	VA	US	VIEW
42569	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	Wash	Distributor		1550 Lovill 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		1550 N. Stemmons Freeway	Crawford	TX	US	VIEW
42984	Precious	Little	Customer		1550 N. Stemmons Freeway	Crawford	TX	US	VIEW
42985	Denise	Howell	Customer		Asdf	Crawford	TX	US	VIEW
42986	Aurora	Krivacic	Customer		Asdf	Crawford	TX	US	VIEW
43066	Jason	Secker	Distributor		Asdf	Crawford	TX	US	VIEW
43067	Richard	Perryman	Distributor		Asdf	Crawford	TX	US	VIEW

Click on "Search" in the upper right corner.

The following window will open:

Search ✖

Find

In Company ▼

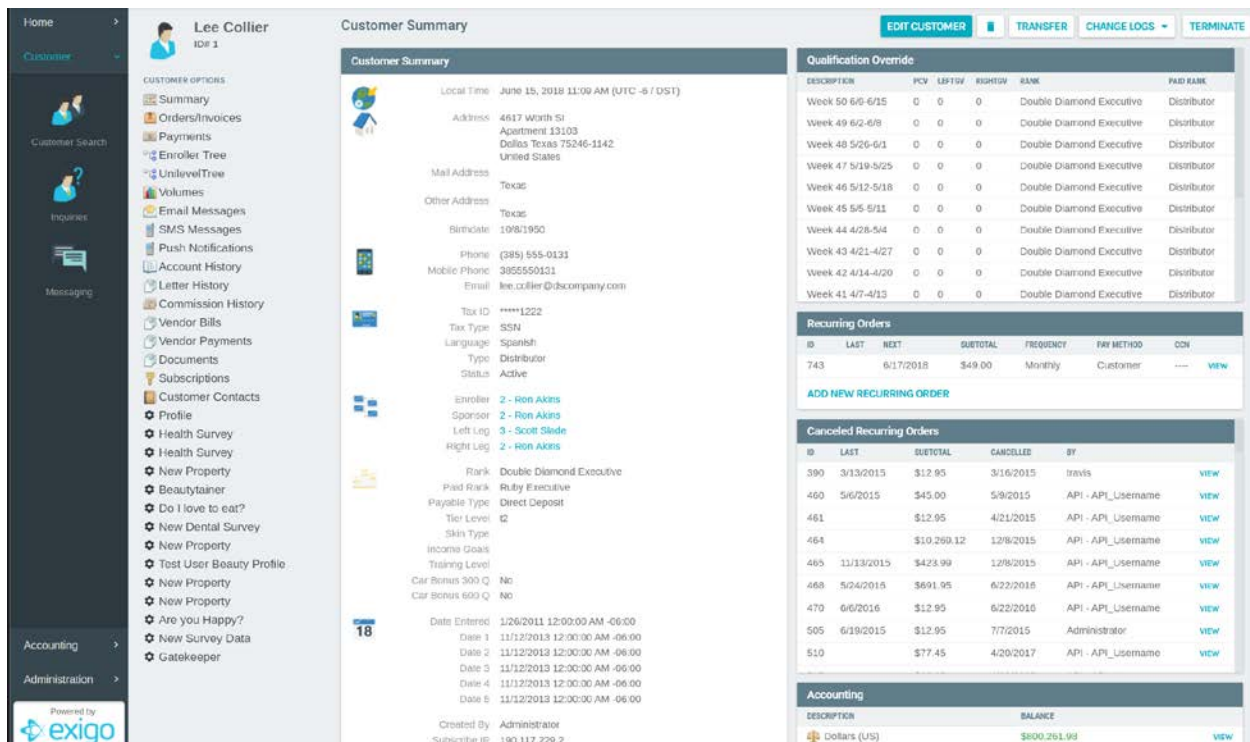
CANCEL
ADVANCED
SEARCH

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.



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: 19811950

Phone: (385) 555-0131

Mobile Phone: 3855550131

Email: lee.collier@disccompany.com

Tax ID: *****1222

Tax Type: SSN

Language: Spanish

Type: Distributor

Status: Active

enroller: 2 - Ron Akks

Sponsor: 2 - Ron Akks

Left Leg: 3 - Scott Skide

Right Leg: 2 - Ron Akks

Rank: Double Diamond Executive

Paid Rank: Ruby Executive

Payable Type: Direct Deposit

Tier Level: Q2

Skin Type:

Income Goals:

Training Level:

Car Bonus 300 Q: No

Car Bonus 600 Q: No

Date Entered: 1/26/2011 12:00:00 AM -06:00

Date 1: 11/2/2013 12:00:00 AM -06:00

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

Date 3: 11/2/2013 12:00:00 AM -06:00

Date 4: 11/2/2013 12:00:00 AM -06:00

Date 5: 11/2/2013 12:00:00 AM -06:00

Created By: Administrator

Subscribe IP: 190.117.229.2

Qualification Override

DESCRIPTION	PCV	LEFTOV	RIGHTOV	RANK	PAID RANK
Week 50 6/6-6/15	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

Recurring Orders

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

ADD NEW RECURRING ORDER

Cancelled Recurring Orders

ID	LAST	SUBTOTAL	CANCELLED	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	6/19/2015	\$12.95	7/7/2015	Administrator
510		\$77.45	4/20/2017	API - API_Username

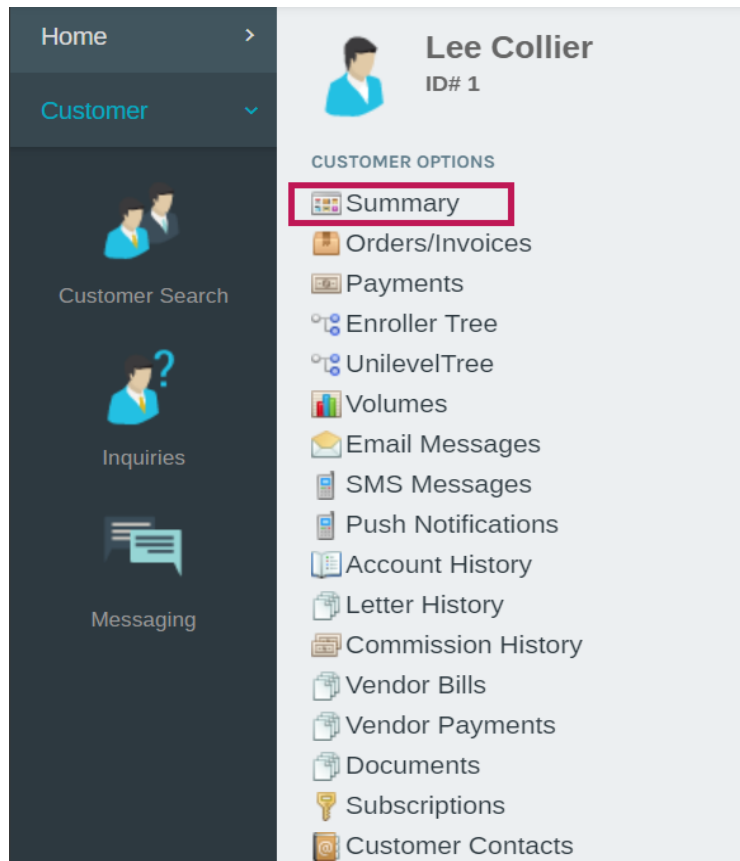
Accounting

DESCRIPTION	BALANCE
Dollars (US)	\$800,261.93

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.

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 utilize 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.

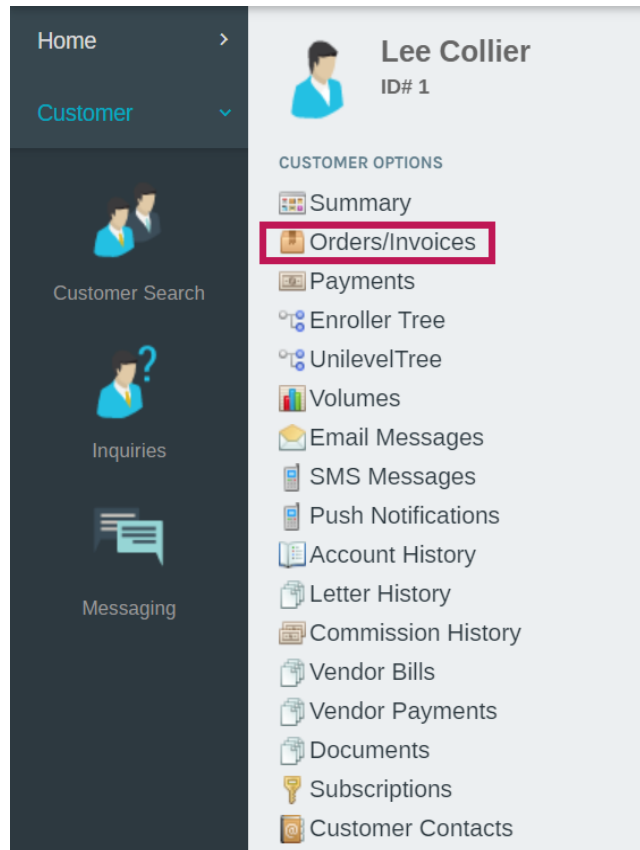
Notes: This section allows Customer Service Representatives to enter Notes related to the Customer. These Notes cannot be seen by the Customer.

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.



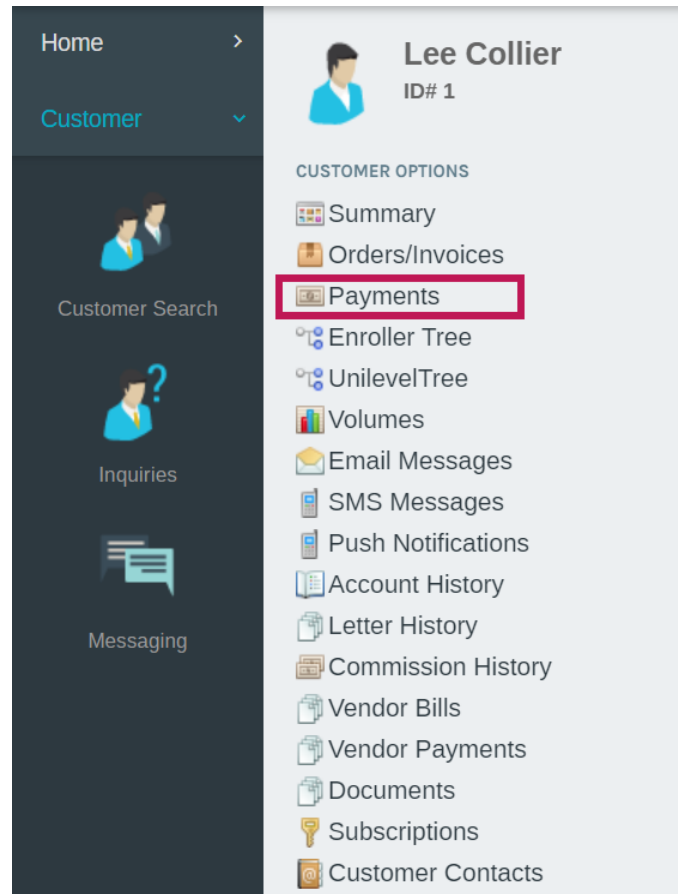
All Orders for this Customer are shown on the right side of the page. The basic information on the Order is shown here: OrderID, OrderDate, Total, StatusDescription, Source, etc. Even if an Order is Returned or Replaced, it will always be shown here unless deleted directly from the Database.

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