

Action Tracking:

Creating and Managing Categories

v 1.1



MANAGING Categories

- 1. Log in to Exigo.com.
- 2. To set up Action Tracking Categories, Go to Administration > Settings > Action Tracking Categories.
- 3. Click on "MODIFY CATEGORIES".

Home >	Company Settings	Modify Canaral Sattin	aa		ANY SETTIN	GS ACCOUNTING SETTINGS
Customer >	Subscriptions	Woully General Setun	<u>h</u> a	84		
Accounting >	No subscriptions defined	Customer Types Custom Fi	elda Required Fields Action Tracking Display Fields Subscriptions Poin	t(=)	_	
Administration -	MODIFY SUBSCRIPTION SETTINGS	ADD TYPE				
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Company News	Back Office Replicated Size Fullfilment MODIFY CATEGORIES User Password MODIFY USER PASSWORD Extended Properties MODIFY EXTENDED PROPERTIES			Damaged Product Product Not Received MODIFY RETURN REAS Replacement Remon Description Damaged Product Not Satelind with Product Product Not Received MODIFY REPLACEMEN	ICONS Inc. T REASONS	True True Enabled True True True
Powered by Powered by exigo				Customer Termination	1 Settings	

4. To Add a new category, click on "ADD TYPE".

Modify General Settings	Action Tracking Type Setup		8	×
Customer Types Custom Fields	Description Description		oint(a)	
TYPE		CANCEL ADD TYPE	EDIT	1. 1.
Commissions			EDIT	1
Replicated Site			EDIT	1
			CANCEL SAVE CHA	NGES



- 5. Type a Description.
- 6. Click "Enabled".
- 7. Click "SAVE CHANGES".
- 8. To Modify existing Categories, click "EDIT" on the Category.

Modify General Settings	ction Tracking Type Setup	S - 5
Customer Types Custom Fields Require	Description Refunds Ions Point(s)	
TYPE	CANCEL SAVE CHANGES	EDIT I
Commissions		EDIT I
Replicated Site		EDIT 1
Eufillment		EDIT i
	CANCEL	SAVE CHANGES

- 9. To Delete the Category, click the Trash Can Icon.
- 10. To Edit the Description, Type the new Description and Click "SAVE CHANGES".

The new "Action Tracking Category" will be available when submitting a new "INQUIRY". For further details refer to the document "Action Tracking – Creating and Managing Entries"

Home >	Test Joel	Account History	
Customer ~	CUSTOMER OPTIONS	New Tracking Category: Test CLOSED Delete History Entry To: Jorge Rodriguez, From: Jorge Rodriguez 2020-12-31 11:01:00 -06:00	
-	Orders/Invoices	🗅 https://v5live2.exigo.com/admin6/v2020.10.7.2/fde479b7d8a74162ae51f9abd1d5df89/CustomerHistory/CustomerHistoryManage? —	
Customer Search	🕮 Payments °t Enroller Tree	A https://v5live2.exigo.com/admin6/v2020.10.7.2/fde479b7d8a74162ae51f9abd1d5df89/CustomerHistory	/Custo
<u></u>	ଂଅ UniLevel Tree 🔚 Codings	Customer History	
Inquiries	Volumes Email Messages	Customer ID 3	
1	SMS Messages	Customer Name Test Joel	
	Push Notifications	Category (General)	•
Messaging	Account History Commission History	Assigned To (General)	
	🗇 Vendor Bills	New Tracking Category	
	🗇 Vendor Payments	Refunds	
	Documents	Description Test Tracking Category	
	Social Networking	Detail Detail	
	-	Status OPEN	•
Accounting >		Reference Reference	
Administration >			