



# Recurring Orders

V2.1

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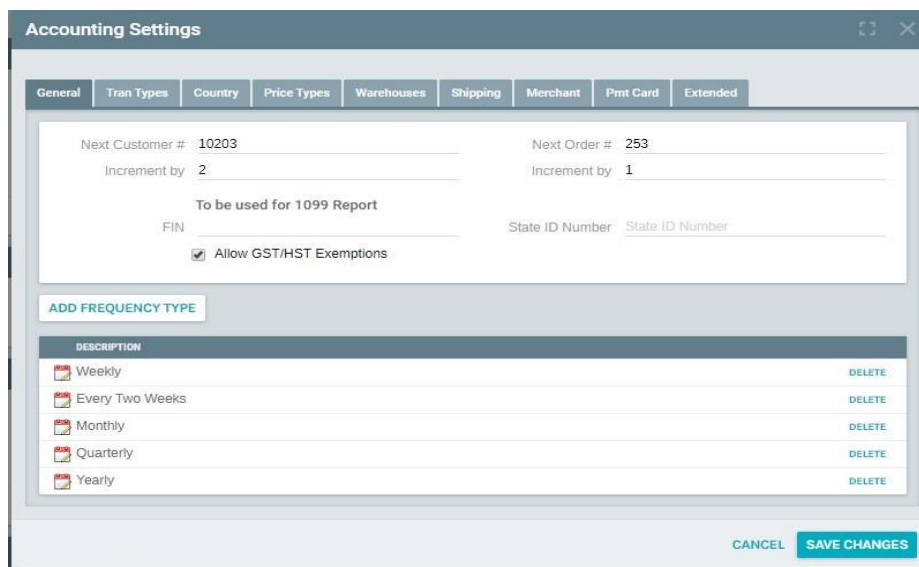
## What is a Recurring Order?

A recurring order in Exigo is a scheduled order that is created and billed on a pre-determined frequency, commonly referred to as an autoship or subscription.

## What Frequencies are Available?

Available order frequencies are weekly, bi-weekly, monthly, quarterly, bi-annually, annually, and bi-monthly. These options are enabled in Exigo Admin by navigating to:

Administration > Settings > Accounting Settings > Modify General Settings > Add Frequency Type.

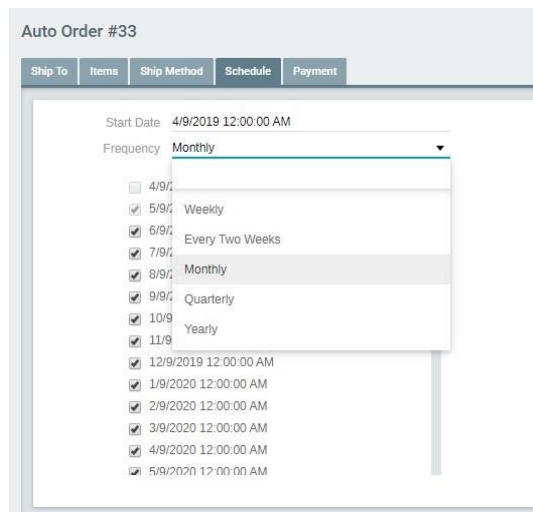


The screenshot shows the 'Accounting Settings' window with the 'General' tab selected. The 'ADD FREQUENCY TYPE' section is visible, containing a table of frequency options:

DESCRIPTION	
Weekly	DELETE
Every Two Weeks	DELETE
Monthly	DELETE
Quarterly	DELETE
Yearly	DELETE

Buttons for 'CANCEL' and 'SAVE CHANGES' are located at the bottom right of the window.

Once enabled, they will appear as options on the Schedule tab when adding or editing a recurring order:

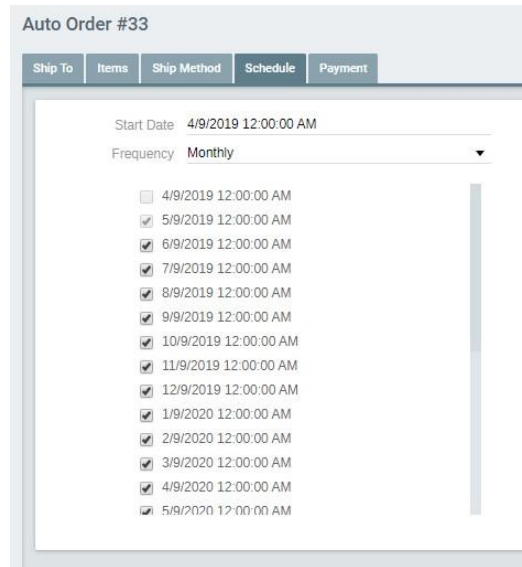


The screenshot shows the 'Auto Order #33' window with the 'Schedule' tab selected. The 'Frequency' dropdown menu is open, displaying the following options:

- 4/9/2019
- 5/9/2019 Weekly
- 6/9/2019 Every Two Weeks
- 7/9/2019
- 8/9/2019 Monthly
- 9/9/2019 Quarterly
- 10/9/2019 Yearly
- 11/9/2019
- 12/9/2019 12:00:00 AM
- 1/9/2020 12:00:00 AM
- 2/9/2020 12:00:00 AM
- 3/9/2020 12:00:00 AM
- 4/9/2020 12:00:00 AM
- 5/9/2020 12:00:00 AM

## How Often will Orders be Generated from Recurring Orders?

Once the recurring order is created, the schedule queue is updated with the next run date based on the Start Date and Frequency type entered. You can see the queue on the Schedule tab:



Auto Order #33

Ship To | Items | Ship Method | Schedule | Payment

Start Date: 4/9/2019 12:00:00 AM

Frequency: Monthly

- 4/9/2019 12:00:00 AM
- 5/9/2019 12:00:00 AM
- 6/9/2019 12:00:00 AM
- 7/9/2019 12:00:00 AM
- 8/9/2019 12:00:00 AM
- 9/9/2019 12:00:00 AM
- 10/9/2019 12:00:00 AM
- 11/9/2019 12:00:00 AM
- 12/9/2019 12:00:00 AM
- 1/9/2020 12:00:00 AM
- 2/9/2020 12:00:00 AM
- 3/9/2020 12:00:00 AM
- 4/9/2020 12:00:00 AM
- 5/9/2020 12:00:00 AM

## How are Recurring Orders Generated?

The Automated Recurring Order (ARO) service runs every two hours. This service looks for any recurring orders that have scheduled dates earlier than when the service is running. If a record exists in the queue, then an order will be generated, and the schedule is updated to show it has already processed. The Last Run Date and the Next Run Date values on the recurring order will be updated.

This means that any changes to the recurring orders throughout the day will be picked up on the next running of the service and you do not have to wait until after midnight for the recurring orders to process.

## What Status Will Appear on the Order?

Orders generated by the Recurring Order will appear on the Customer screen under Orders/Invoices. The status is based on the payment method the order is set to use:

Orders/Invoices						ADD ORDER	RETURN ORDER	REPLACE ORDER
ORDER ID	ORDER DATE	TOTAL	STATUS	SOURCE	TR			
254	5/16/2019	\$20.00	Pending	Recurring Order				
253	5/16/2019	\$0.00	Accepted	Replacement Order				
RMA-251	4/9/2019	\$20.00	Pending	Recurring Order				
231	7/13/2017	\$0.00	Pending	Customer Service				
225	5/24/2017	\$34.00	Printed	Replacement Order				
221	5/8/2017	\$307.28	Printed	Customer Service				
156	8/18/2016	\$22.00	Shipped	Customer Service				

**CCPENDING** - The order will be saved with this status if the payment method is Primary or Secondary Credit Card on File.

**ACHPENDING** - If the Payment method is Debit Checking Account, Primary Wallet Account or Secondary Wallet Account then the order will be saved with this status.

**PENDING** - If the Payment method is Customer Will Send Payment, the order will be saved with this status.

## How Do I Process Payments for the Orders Generated by Recurring Orders?

Once the Automated Recurring Order (ARO) service runs, all orders will appear under the appropriate warehouse. You can see this by going to Accounting > Invoices.

Invoices	
<b>Default</b>	
Incomplete	1
Pending	10
CC Declined	0
ACH Declined	0
Cancelled	2
CC Pending	6
ACH Pending	0
Accepted	7 <a href="#">Create New Batch</a>
Printed	55
Shipped	35
Pending Inventory	0
<b>USA</b>	
Incomplete	0
Pending	1

## CREDIT CARD PAYMENTS

To process credit card payments for CC Pending orders, click on “CC Pending”. At the top of the popup window, click on the “Charge Credit Cards” button.

CC Pending Orders for Default

<input type="checkbox"/>	ORDERID	ORDER DATE	CUSTOMERID	COMPANY	NAME	CITY	STATE	CO
<input type="checkbox"/>	236	8/7/2017	10004		Sally Smith	Crawford	TX	US
<input type="checkbox"/>	234	8/7/2017	10017		Matthias Test	Arlington	TX	US
<input type="checkbox"/>	212	2/23/2017	10017		Matthias Test	IRWIN	PA	US
<input type="checkbox"/>	206	2/6/2017	10017		Matthias Test	IRWIN	PA	US
<input type="checkbox"/>	194	12/8/2016	10017		Matthias Test	IRWIN	PA	US
<input type="checkbox"/>	171	10/11/2016	10017		Matthias Test	Arlington	TX	US

After you confirm the charge attempt:

### Process Credit Card Transactions

#### WARNING:

You are about to charge all customer's CREDIT CARDS for ALL orders in this warehouse with an order status of "CC Pending". If you would like to exclude any order from this process, click the "Cancel" button and change the status type of the orders you do not wish to process. Clicking the "OK" button will begin CREDIT CARD batch processing.

Would you like to proceed?

The Credit Card Batch Charge screen will appear:

**Credit Card Batch Charge**
⌵

**Charge batch completed successfully**

Percent Complete: 100%

Authorized Count:	0
Authorized Amount:	\$0.00
Declined Count:	1
Declined Amount:	\$10.00
Misc Error Count:	5
Misc Error Amount:	\$160.00

**VIEW RESULTS**

DATE	DESCRIPTION
3:14:49 PM	Charging card for Matthias Test
3:14:49 PM	Charging card for Matthias Test
3:14:49 PM	Charging card for Matthias Test
3:14:49 PM	Charging card for Matthias Test
3:14:49 PM	Charging card for Matthias Test
3:14:49 PM	Charging card for Sally Smith
3:14:49 PM	Charge batch completed successfully

**CLOSE**

You can then monitor the batch charging of the payments. If another User attempts to process the CC Pending orders by clicking on the same button, they will be redirected to this Batch Charge screen.

As the batch charge process runs, any payment attempt that is authorized by your credit card gateway will automatically create the Payment record for the order and will change the Order status to Accepted.

For any payment attempt that is declined, no payment record is created, and the order status will be changed to CC Declined.

If there is a miscellaneous error the order may stay in CC Pending status.

## ACH (ECHECK OR WALLET) PAYMENTS

To process payments for ACH Pending orders, click on ACH Pending and a popup will appear. At the top of the screen, click on the “Run ACH Debit” button.

**ACH Pending Orders for Main**

ORDERID	ORDER DATE	CUSTOMERID	COMPANY	NAME	CITY	STATE	COUNTRY
<input type="checkbox"/>							
<input type="checkbox"/> 9829038	4/21/2017	3	TEST TREE	TEST Smith	Crawford	TX	US
<input type="checkbox"/> 9828229	4/21/2017	3	TEST TREE	TEST Smith	Crawford	TX	US
<input type="checkbox"/> 9827390	4/21/2017	3	TEST TREE	TEST Smith	Crawford	TX	US
<input type="checkbox"/> 9827243	4/21/2017	3	TEST TREE	TEST Smith	Crawford	TX	US
<input type="checkbox"/> 9827038	4/21/2017	3	TEST TREE	TEST Smith	Crawford	TX	US
<input type="checkbox"/> 9826906	4/21/2017	3	TEST TREE	TEST Smith	Crawford	TX	US
<input type="checkbox"/> 9826750	4/21/2017	3	TEST TREE	TEST Smith	Crawford	TX	US

After you confirm the charge attempt:

### Process ACH Debit

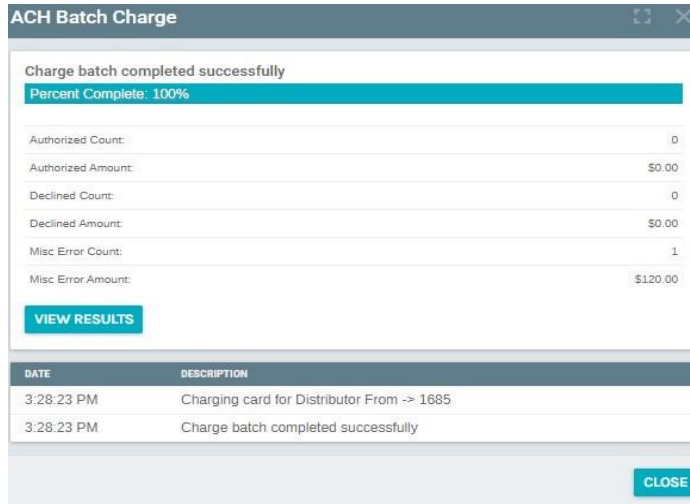
**WARNING:**

You are about to run ACH DEBIT for ALL customer order's in this warehouse with an order status of "ACH Pending".If you would like to exclude any order from this process, click the "Cancel" button and change the status type of the orders you do not wish to process.Clicking the "OK" button will begin ACH DEBIT batch processing.

Would you like to proceed?



The ACH Batch Charge screen will appear:



You can then monitor the batch charging of the payments. If another User attempts to process the ACH Pending orders by clicking on the same button, they will be redirected to this Batch Charge screen.

As the batch charge process runs, any payment attempt that is authorized by your ACH gateway will automatically create the Payment record for the order and will change the Order status to Accepted.

For declined payments, no payment record is created, and the order status will be changed to ACH Declined.

For miscellaneous errors (missing checking account, bad wallet account), the order may stay in ACH Pending status.

## How Do I Retry the Payment?

For Declined orders, you can retry the payment by changing the orders back to CC Pending status. To do this navigate Accounting > Invoices > CCDeclined. A popup will appear showing the orders and a Declined Count column. You can then mass select the orders from this screen that you want to retry and click on the Change Order Status button at the top of the screen and select CCPending.

**CC Declined Orders for Main**

**PRINT** **CHANGE ORDER STATUS**

ORDERID	ORDER DATE	CUSTOMERID	COMPANY	NAME	CITY	STATE	COUNTRY	PHONE	TOTAL	DECLINED COUNT
<input type="checkbox"/>										
<input type="checkbox"/>	9843586	8/23/2017	102251	MLB Concepts	Beth Warren	The Colony TX	US	9726705734	\$75.00	0
<input type="checkbox"/>	9839063	4/21/2017	1			AA	US	3855550131	\$91.00	0
<input type="checkbox"/>	9834214	4/21/2017	2	Ron Akins	Cocoa	FL	US	321-455-2884	\$106.50	1
<input type="checkbox"/>	9833196	4/21/2017	2	Ron Akins	Cocoa	FL	US	321-455-2884	\$106.50	1

## How Do I Change the Process Day?

To change the process day, navigate to the recurring order > Edit Recurring Order. Change the start date to the date you **next** want the order to process. Selecting a date in the past may impact the schedule queue that has already been established for the recurring order.