Order Sub-Status

V2020.8.0.0

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Background Information

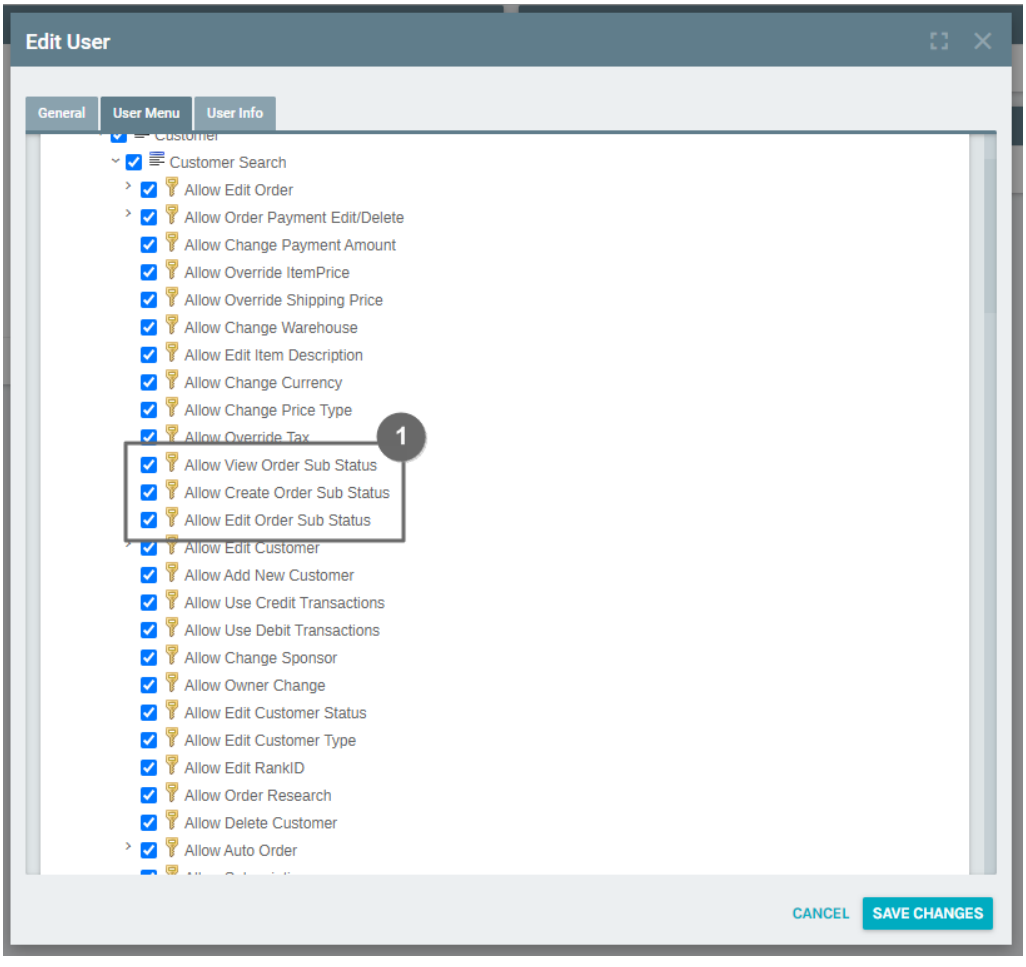
On Exigo Admin version TBA and greater, Exigo has a implemented a feature which allows users to use an order sub-status with main order status.

1. Order Sub-Status Manager
    a. The order sub-status manager allows a user with the right permissions to add/edit/delete an order sub-status.
2. Enabling a Sub-Status
    a. Users can access the order sub-status on the payment tab on an order and by using the "Change Status" dropdown on the invoice screen.
    b. Users must have the **"Allow Edit Order Status"** permission enabled to be able to change the order status and order sub-status.

Please see below for more details.

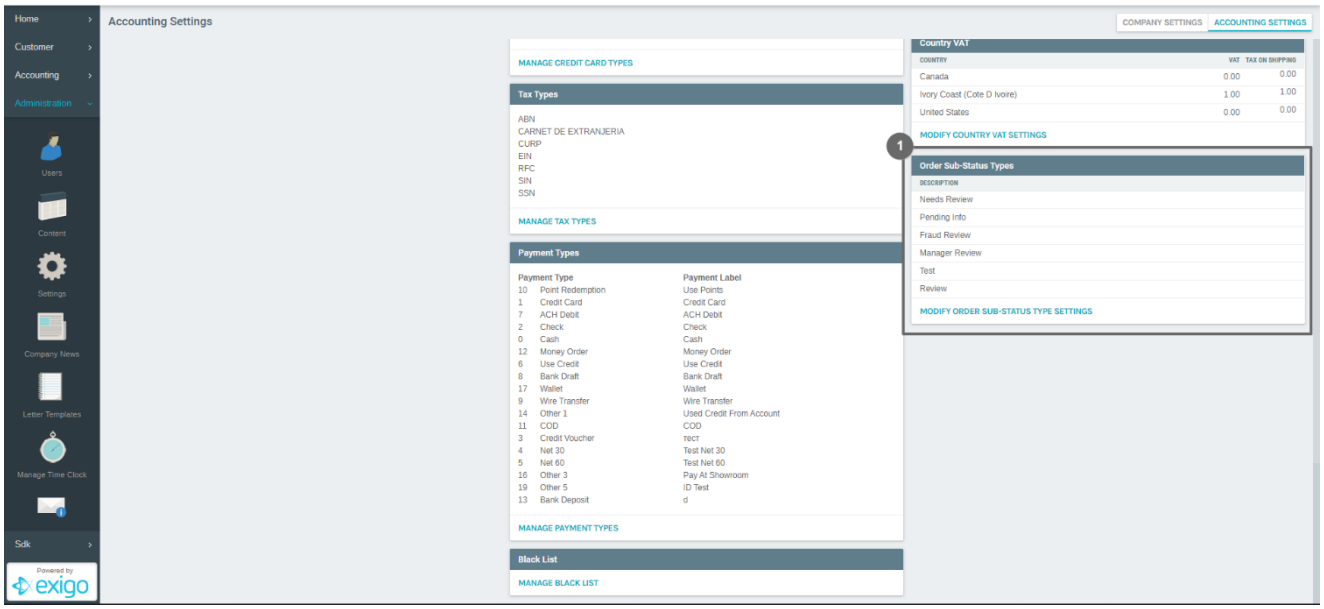
ORDER SUB-STATUS MANAGER PERMISSIONS

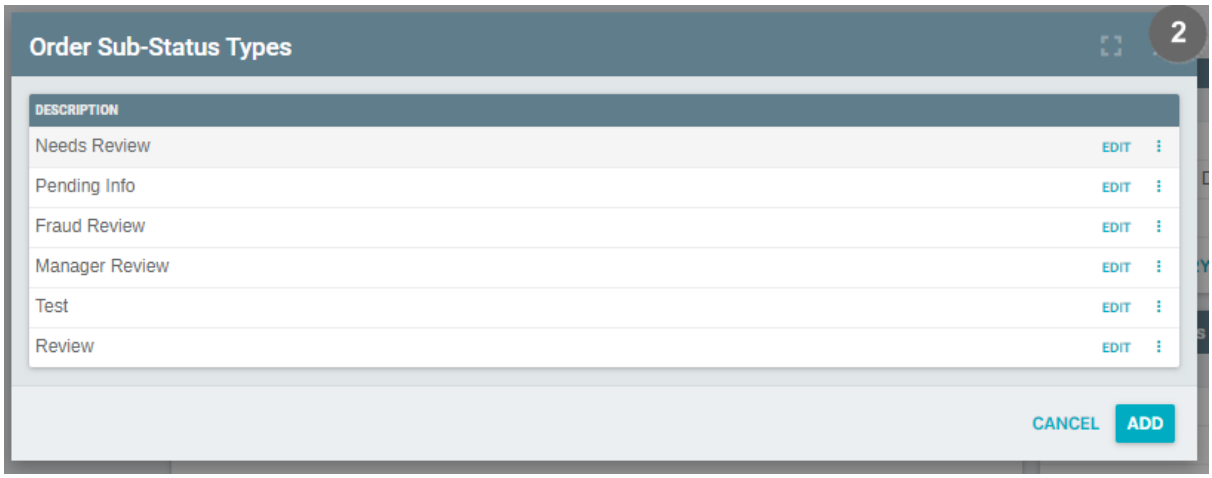
1. There are three permissions that allow the user to add/edit/delete an order sub-status.
    a. **Allow View Order Sub Status**
    b. **Allow Create Order Sub Status**
    c. **Allow Edit Order Sub Status**
2. Once the permission is enabled, the user will need to log out and back into the instance.

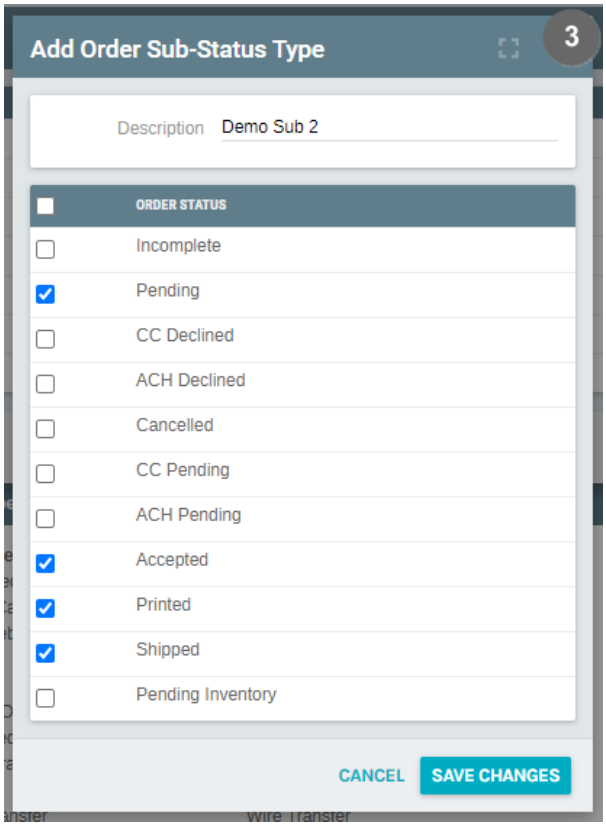


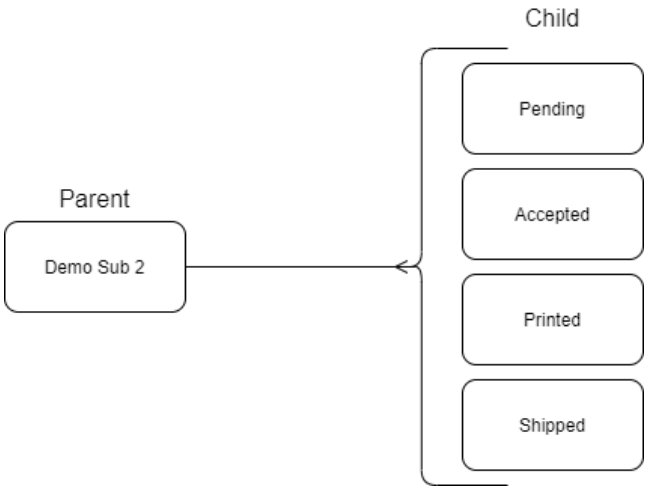
ORDER SUB-STATUS MANAGER

1. The order sub-status manager can be found under Administration>Settings>Accounting Settings.
2. The order sub-status manager allows a user to view, add, edit, and delete an order sub-status.
3. To add an order sub-status:
    a. Click on "Add".
    b. Enter the description of the order sub-status.
    c. Click the checkboxes of the main order status need to be tie to the sub-status.



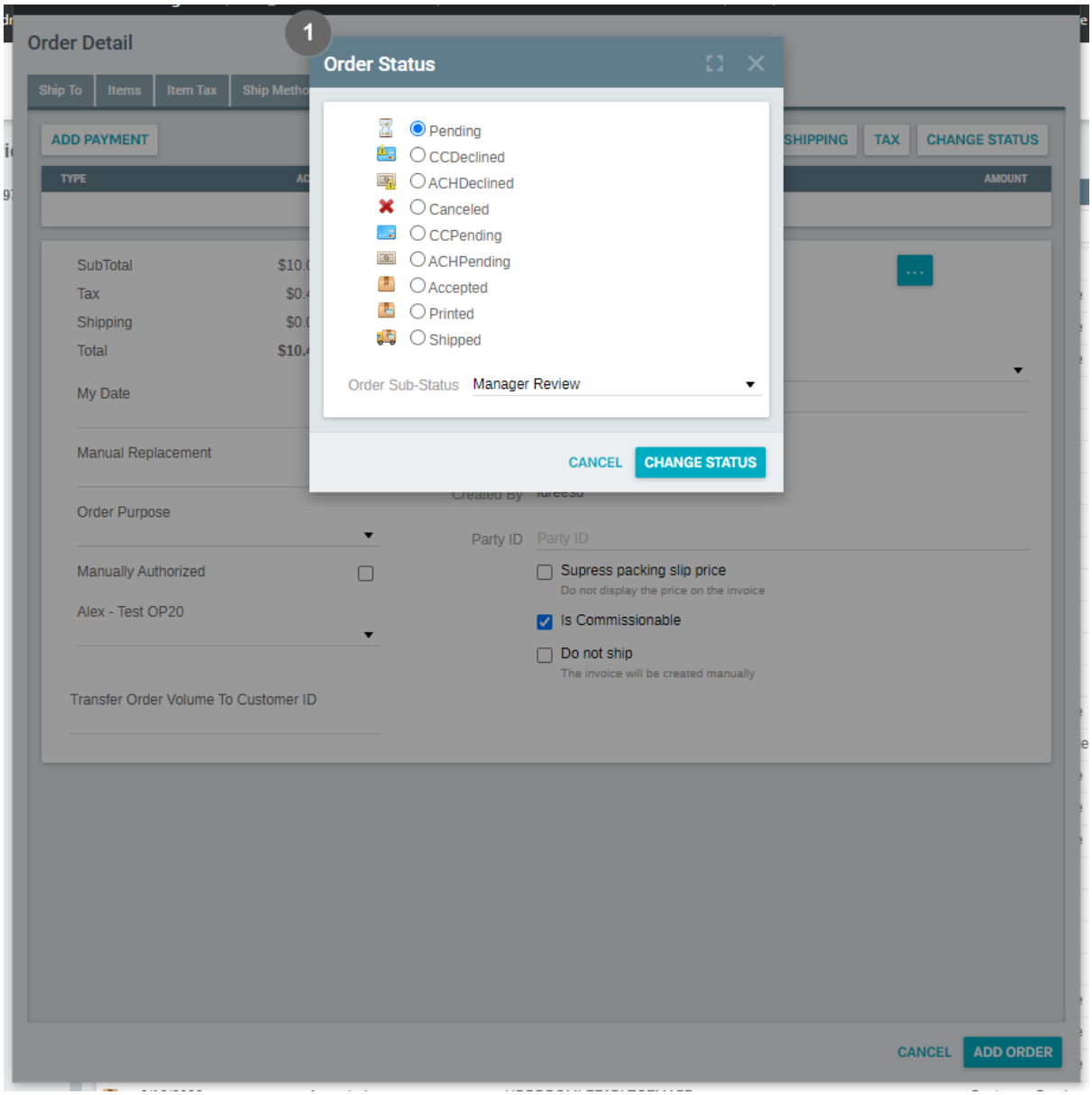


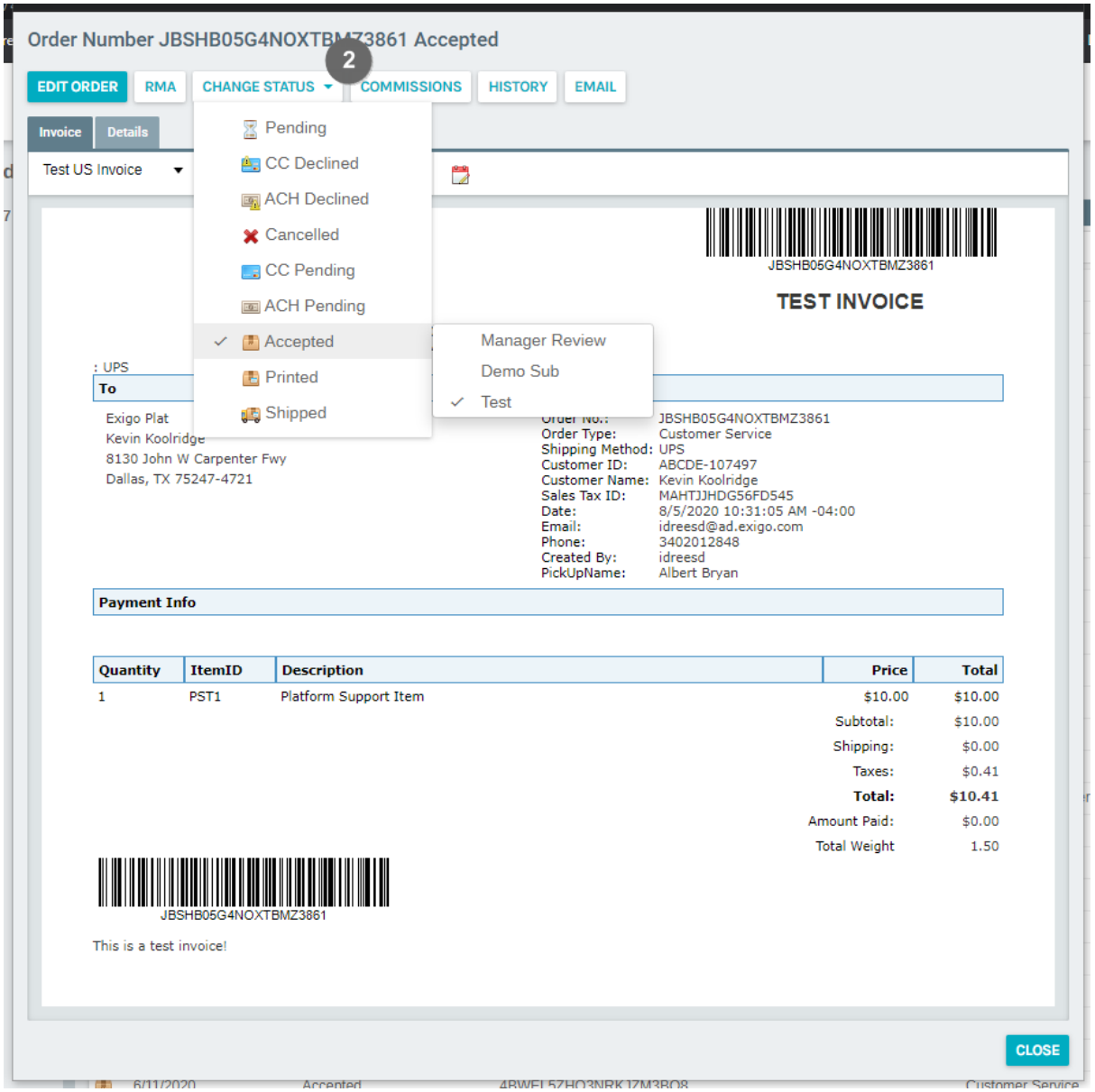

Add Order Sub-Status Type
3
Description
Demo Sub 2
ORDER STATUS
Incomplete
Pending
CC Declined
ACH Declined
Cancelled
CC Pending
ACH Pending
Accepted
Printed
Shipped
Pending Inventory
CANCEL
SAVE CHANGES

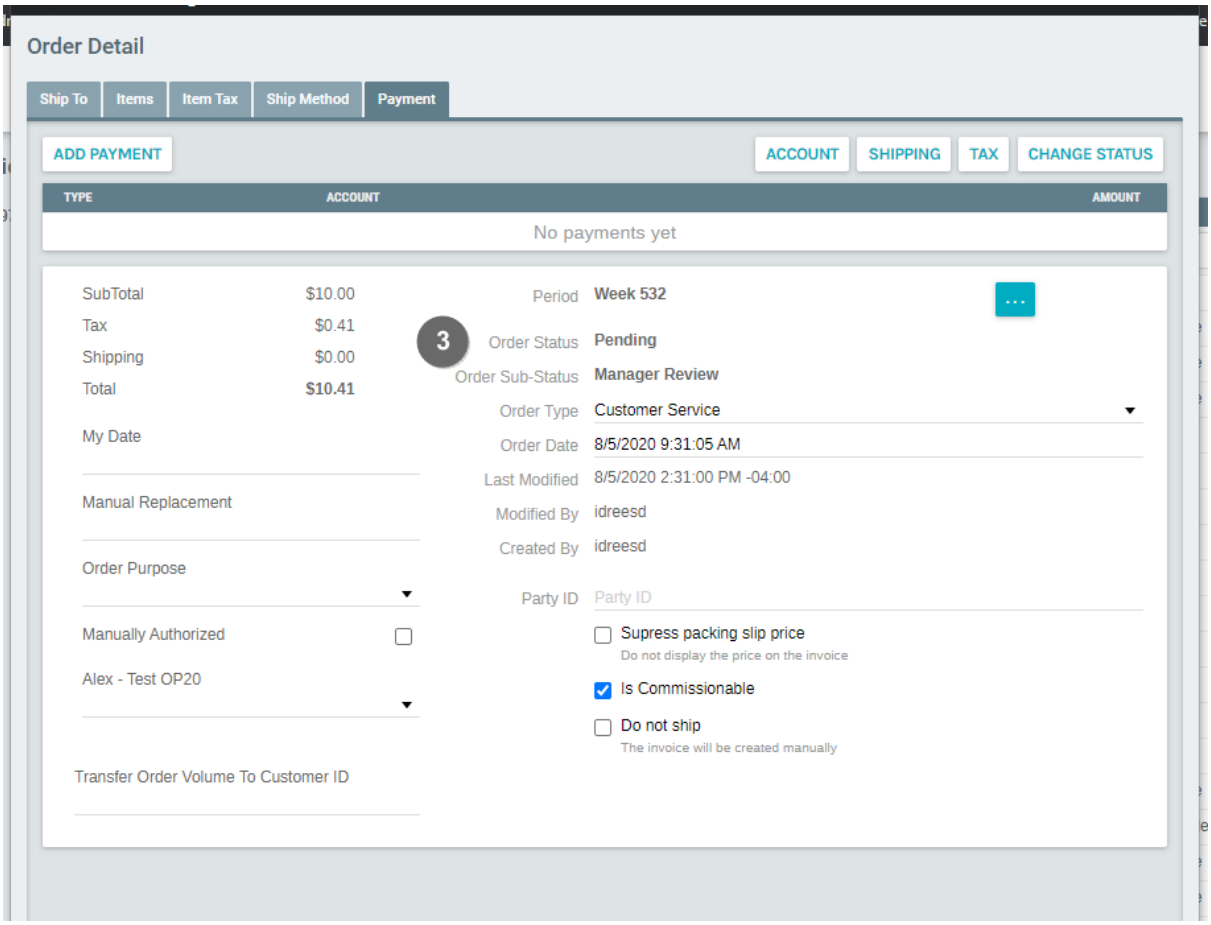

Child
Pending
Accepted
Printed
Shipped
Parent
Demo Sub 2

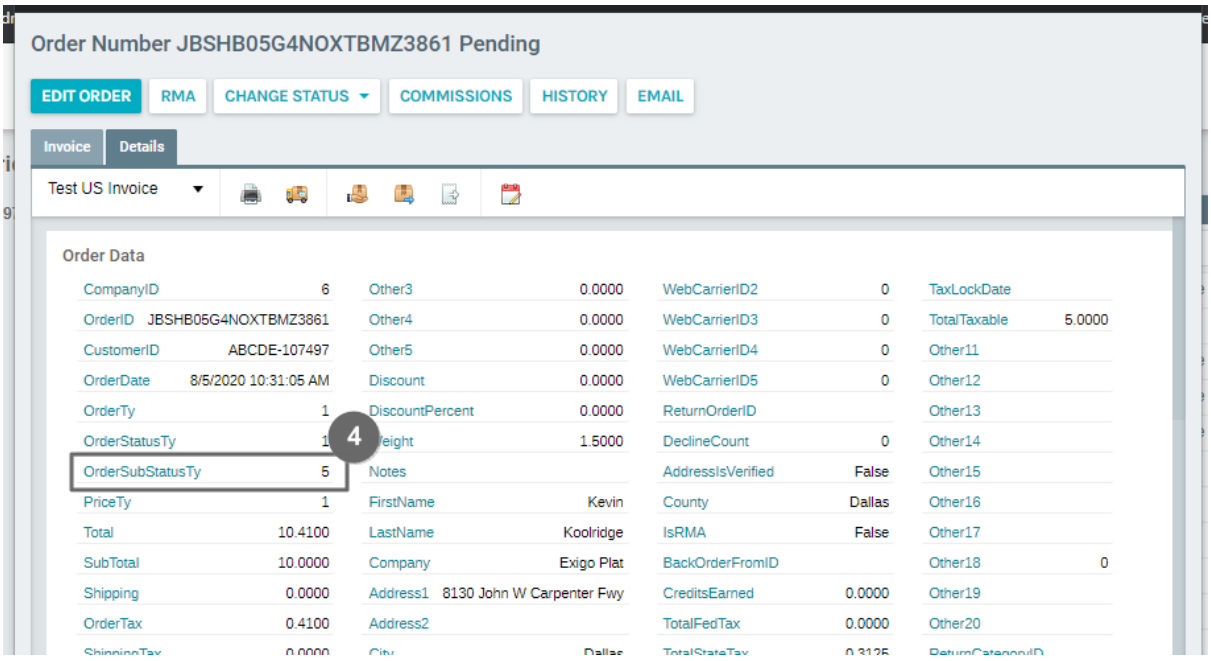
ENABLING A SUB-STATUS

1. The order sub-status can be enabled on the "Change Status" button on the payment tab on an order.
    a. Use the "Order Sub-Status" dropdown to select sub-status.
2. The order sub-status can be enabled by using the "Change Status" dropdown on the order invoice window.
3. The order sub-status can be viewed on the payment tab on the order and in the order details.




Order Number JBSHB05G4NOXTBMZ3861 Accepted
2
EDIT ORDER
RMA
CHANGE STATUS
COMMISSIONS
HISTORY
EMAIL
Invoice
Details
Test US Invoice
Pending
CC Declined
ACH Declined
Cancelled
CC Pending
ACH Pending
Accepted
Printed
Shipped
Manager Review
Demo Sub
Test
JBSHB05G4NOXTBMZ3861
TEST INVOICE
: UPS
To
Exigo Plat
Kevin Koolridge
8130 John W Carpenter Fwy
Dallas, TX 75247-4721
JBSHB05G4NOXTBMZ3861
Order Type: Customer Service
Shipping Method: UPS
Customer ID: ABCDE-107497
Customer Name: Kevin Koolridge
Sales Tax ID: MAHTJJHDG56FD545
Date: 8/5/2020 10:31:05 AM -04:00
Email: idreesd@ad.exigo.com
Phone: 3402012848
Created By: idreesd
PickUpName: Albert Bryan
Payment Info
Quantity
ItemID
Description
Price
Total
1
PST1
Platform Support Item
$10.00
$10.00
Subtotal: $10.00
Shipping: $0.00
Taxes: $0.41
Total: $10.41
Amount Paid: $0.00
Total Weight 1.50
JBSHB05G4NOXTBMZ3861
This is a test invoice!
CLOSE


Order Detail
Ship To
Items
Item Tax
Ship Method
Payment
ADD PAYMENT
ACCOUNT
SHIPPING
TAX
CHANGE STATUS
TYPE
ACCOUNT
AMOUNT
No payments yet
SubTotal $10.00
Tax $0.41
Shipping $0.00
Total $10.41
My Date
Manual Replacement
Order Purpose
Manually Authorized
Alex - Test OP20
Transfer Order Volume To Customer ID
3
Period Week 532
Order Status Pending
Order Sub-Status Manager Review
Order Type Customer Service
Order Date 8/5/2020 9:31:05 AM
Last Modified 8/5/2020 2:31:00 PM -04:00
Modified By idreesd
Created By idreesd
Party ID
Supress packing slip price
Do not display the price on the invoice
Is Commissionable
Do not ship
The invoice will be created manually


Order Number JBSHB05G4NOXTBMZ3861 Pending
EDIT ORDER
RMA
CHANGE STATUS
COMMISSIONS
HISTORY
EMAIL
Invoice
Details
Test US Invoice
Order Data
CompanyID 6
OrderID JBSHB05G4NOXTBMZ3861
CustomerID ABCDE-107497
OrderDate 8/5/2020 10:31:05 AM
OrderTy 1
OrderStatusTy 1
OrderSubStatusTy 5
PriceTy 1
Total 10.4100
SubTotal 10.0000
Shipping 0.0000
OrderTax 0.4100
Other3 0.0000
Other4 0.0000
Other5 0.0000
Discount 0.0000
DiscountPercent 0.0000
Freight 1.5000
Notes
FirstName Kevin
LastName Koolridge
Company Exigo Plat
Address1 8130 John W Carpenter Fwy
Address2
City Dallas
WebCarrierID2 0
WebCarrierID3 0
WebCarrierID4 0
WebCarrierID5 0
ReturnOrderID
DeclineCount 0
AddressIsVerified False
County Dallas
IsRMA False
BackOrderFromID
CreditsEarned 0.0000
TotalFedTax 0.0000
TaxLockDate
TotalTaxable 5.0000
Other11
Other12
Other13
Other14
Other15
Other16
Other17
Other18 0
Other19
Other20
4