

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.



Order Sub-Status Types		2
DESCRIPTION		
Needs Review	EDIT	
Pending Info	EDIT	
Fraud Review	EDIT :	
Manager Review	EDIT	
Test	EDIT	
Review	EDIT	
	CANCEL ADD	>



Description Demo Sub 2 Incomplete Pending CC Declined CC Declined ACH Declined Cancelled CC Pending ACH Pending ACH Pending Accepted Printed	
ORDER STATUS Incomplete Pending CC Declined ACH Declined Cancelled CC Pending ACH Pending ACH Pending ACH Pending Parent	Child
 Incomplete Pending CC Declined ACH Declined Cancelled CC Pending ACH Pending Accepted Printed 	_
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 ACH Declined Cancelled CC Pending ACH Pending Accepted Printed 	
Cancelled CC Pending ACH Pending Accepted Printed	Accepted
CC Pending ACH Pending Accepted Printed	
ACH Pending Accepted Printed	Printed
Accepted Printed	
Printed	Shipped
Shipped	
Pending Inventory	
CANCEL SAVE CHANGES	



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.

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ADD PAYMENT TYPE SubTotal Tax Shipping Total My Date	AC \$10.(\$0.4 \$0.(\$10.4	 Pendi O CCDe O ACHE O CARCI O CCPe O ACHE O ACHE	ng eclined beclined eled ending vted d ed Manager	Review	-	SHIPPING TAX	CHANGE STATUS
Manual Replacement							
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Manually Authorized	C)	Party ID	Supress packin	g slip price		
Alex - Test OP20		,		Is Commission	able		
Transfer Order Volume To C	ustomer ID			Do not ship The invoice will be	created manually		



	CHANGE	STATUS -	COMMISS	IONS	HISTOR	Y EMAIL			
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st US Invoice 🗸 🗸	<u> </u>	CC Decline	d	-					
		ACH Declin	ed						
	×	Cancelled							
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Payment Inf	o								
Quantity	ItemID	Descriptio	on					Price	Total
Quantity	ItemID PST1	Description Platform S	on upport Item					Price \$10.00	Total \$10.00
Quantity 1	ItemID PST1	Platform S	on upport Item					Price \$10.00 Subtotal:	Total \$10.00 \$10.00
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ADD PAYME	NT		ACCOUNT	SHIPPING TAX	CHANGE STATUS
ТҮРЕ	ACCOU	ग			AMOUNT
		No pa	lyments yet		
SubTota	\$10.00	Period	Week 532		
Tax	\$0.41	2 Order Status	Dending		
Shipping	\$0.00	Order Status	Manager Deview		
Total	\$10.41	Order Type	Customer Service		-
My Date		Order Type	8/5/2020 9:31:05 AM		•
		Last Modified	8/5/2020 2:31:00 PM -04:00		
Manual	Replacement	Modified By	idreesd		
Order D		Created By	idreesd		
Order P	urpose	 Party ID 	Party ID		
Manuall	Authorized		Supress packing slip price		
Alex T	-+ 0.020		Do not display the price on the invoice		
Alex - Te	SLOP20	•	Is Commissionable		
			Do not ship		
Transfer	Order Volume To Customer ID		The invoice will be created manually		
Alex - Te	st OP20 Drder Volume To Customer ID	•	 Is Commissionable Do not ship The invoice will be created manually 		

DIT ORDER RMA	CHANGE STATUS		S HISTORY E	MAIL			
voice Details							
est US Invoice 🔹 🔻	🚔 📢	😃 🖳 📑 I					
Order Data							
CompanyID	6	Other3	0.0000	WebCarrierID2	0	TaxLockDate	
OrderID JBSHB05G	4NOXTBMZ3861	Other4	0.0000	WebCarrierID3	0	TotalTaxable	5.0000
CustomerID	ABCDE-107497	Other5	0.0000	WebCarrierID4	0	Other11	
OrderDate 8/5/2	020 10:31:05 AM	Discount	0.0000	WebCarrierID5	0	Other12	
0.012			0.0000	Bature Order ID		Other13	
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OrderTy OrderStatusTy OrderSubStatusTy PriceTy Total SubTotal	1 1 5 1 10.4100 10.0000	DiscountPercent eight Notes FirstName LastName Company	1.5000 Kevin Koolridge Exigo Plat	DeclineCount AddressIsVerified County IsRMA BackOrderFromID	0 False Dallas False	Other14 Other15 Other16 Other17 Other18	0