



Item Maintenance

v1.0

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Items Management

Exigo Office allows you to quickly add, view, and edit Product Items. You may access Item records from the Accounting menu.

Note: Each function and section of Exigo requires security access. Only users with access to the menu will be able to see its functions.

ADDING OR EDITING A NEW PRODUCT ITEM

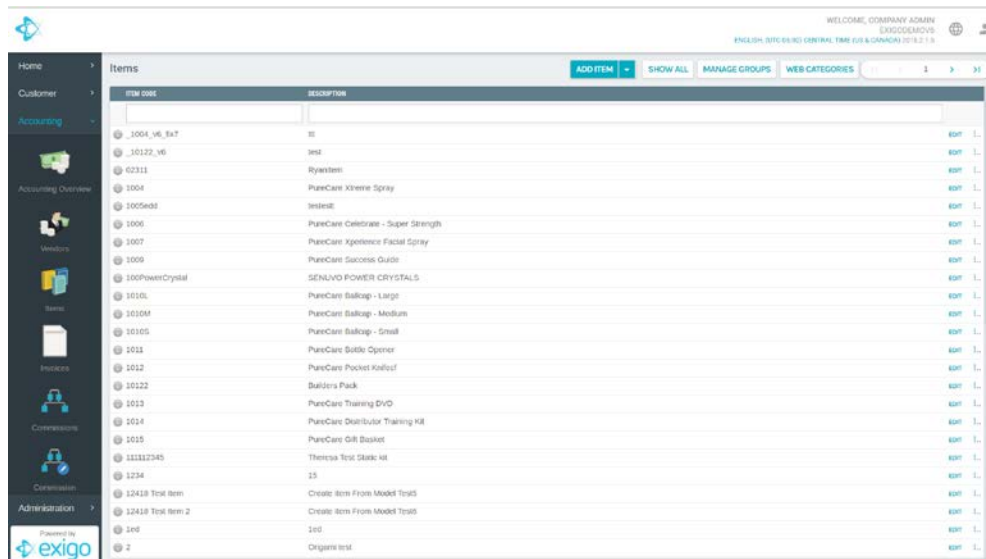
- You may add a new **Product Item** from the **Product List** screen.

Product Items Page

- Click on the **Items** button under the **Accounting Menu**.

Product List Screen

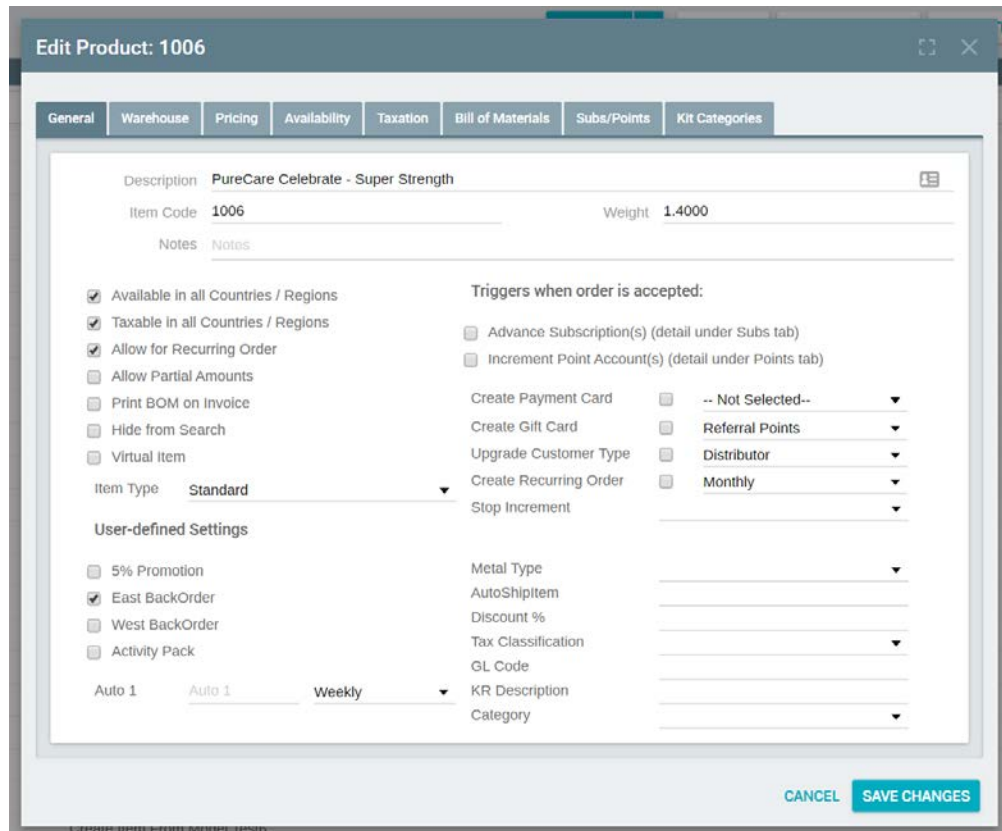
- The **Product List Screen** will open up.



The screenshot shows the 'Items' management interface. It features a sidebar with navigation options: Home, Customer, Accounting, Accounting Overview, Members, Items, Products, Commissions, and Administration. The main area displays a table of product items with columns for Item Code, Description, and Edit/Link options. The table contains various items such as 'test', 'RyanItem', 'PureCare Xlineer Spray', 'PureCare Celebrae - Super Strength', 'PureCare Agecence Facial Spray', 'PureCare Success Guide', 'SENJIVO POWER CRYSTALS', 'PureCare Backlog - Large', 'PureCare Backlog - Medium', 'PureCare Backlog - Small', 'PureCare Bottle Opener', 'PureCare Pocket Kallist', 'Bulders Pack', 'PureCare Training DVD', 'PureCare Distributor Training Kit', 'PureCare Gift Basket', 'Theresa Test Stalk Kit', 'IS', 'Create Item From Model Test', and 'Origam test'.

Item Code	Description	Edit	Link
1004_V6_Ext	test	EDIT	L
10122_V6	test	EDIT	L
02311	RyanItem	EDIT	L
1004	PureCare Xlineer Spray	EDIT	L
1005ext	testext	EDIT	L
1006	PureCare Celebrae - Super Strength	EDIT	L
1007	PureCare Agecence Facial Spray	EDIT	L
1009	PureCare Success Guide	EDIT	L
100PowerCrystal	SENJIVO POWER CRYSTALS	EDIT	L
1010L	PureCare Backlog - Large	EDIT	L
1010M	PureCare Backlog - Medium	EDIT	L
1010S	PureCare Backlog - Small	EDIT	L
1011	PureCare Bottle Opener	EDIT	L
1012	PureCare Pocket Kallist	EDIT	L
10122	Bulders Pack	EDIT	L
1013	PureCare Training DVD	EDIT	L
1014	PureCare Distributor Training Kit	EDIT	L
1015	PureCare Gift Basket	EDIT	L
11112345	Theresa Test Stalk Kit	EDIT	L
1234	IS	EDIT	L
12418 Test Item	Create Item From Model Test	EDIT	L
12418 Test Item 2	Create Item From Model Test	EDIT	L
149	test	EDIT	L
2	Origam test	EDIT	L

- Click on the **Add** button on the **Product Search toolbar** to add a new product to the list.
- The **New Product Screen** will open up to the **General Tab**.



Edit Product: 1006

General Warehouse Pricing Availability Taxation Bill of Materials Subs/Points Kit Categories

Description: PureCare Celebrate - Super Strength

Item Code: 1006 Weight: 1.4000

Notes: Notes

Available in all Countries / Regions
 Taxable in all Countries / Regions
 Allow for Recurring Order
 Allow Partial Amounts
 Print BOM on Invoice
 Hide from Search
 Virtual Item

Item Type: Standard

Triggers when order is accepted:

Advance Subscription(s) (detail under Subs tab)
 Increment Point Account(s) (detail under Points tab)

Create Payment Card -- Not Selected--
 Create Gift Card Referral Points
 Upgrade Customer Type Distributor
 Create Recurring Order Monthly
 Stop Increment

User-defined Settings

5% Promotion
 East BackOrder
 West BackOrder
 Activity Pack

Auto 1: Auto 1 Weekly

Metal Type
AutoShipItem
Discount %
Tax Classification
GL Code
KR Description
Category

CANCEL SAVE CHANGES

GENERAL TAB

- The **General Tab** is the **control center** of the **New Product Screen**. The boxes that are checked will affect the rest of the tabs in the screen.

Inputting Information to Add a New Product

To add a product you need to:

- Name the product
- Input the product code
- Input the weight
- Input any notes about the product

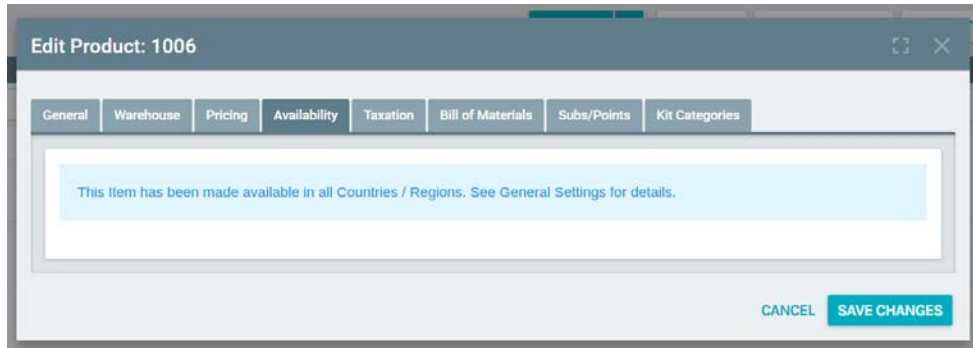
CHOOSING PRODUCT SPECIFICATION TO ADD OR EDIT A NEW PRODUCT

- To add a product, you need to choose the **product specifications** by clicking **into the box next to the desired specifications** in the **General Tab**.
- Remember: these specifications will affect the rest of the tabs in this screen!**
- The **User Defined Settings** are **Custom Settings** that will be created by specification.

AVAILABILITY

- You can make your product available in **all countries and regions**, by clicking **the box next to this specification** in the **General Tab**.

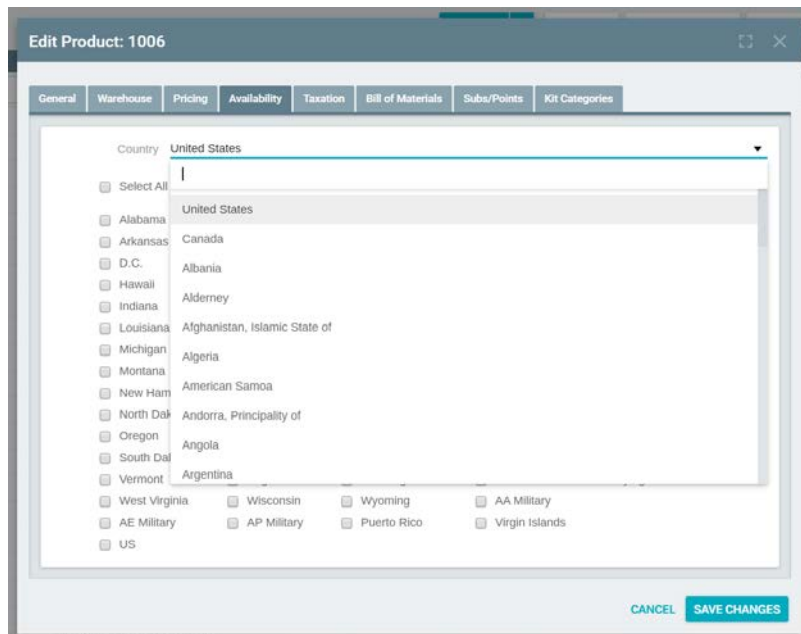
- Available in all Countries/Regions:
- If there **is** a check mark in this box, the **Availability Tab** will show that the item **is available in all countries and regions**.



CHOOSING A SPECIFIC LOCATION FOR PRODUCT AVAILABILITY

Available in all Countries / Regions

- If there is **not** a check mark in this box, the **Availability Tab** will allow you to choose the exact **locations** where the product will be available around the world.

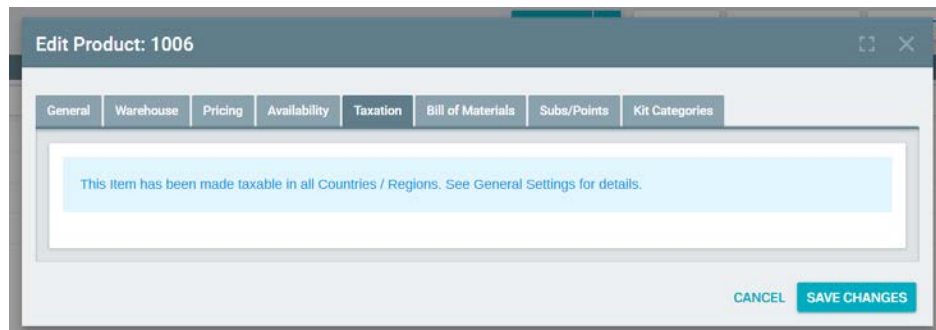


- Choose a country by clicking the **arrow next to the word Country** and **select and Highlight the desired country**.
- The **Availability Tab** will change for any country that is selected.
- The locations with the check marks will be the places the **Product will be available**.
- Click **SAVE CHANGES**

TAXATION

- You can input the **taxation of a product** in all countries and regions, by clicking **the box next to this specification** in the **General Tab**.

Taxable in all Countries / Regions

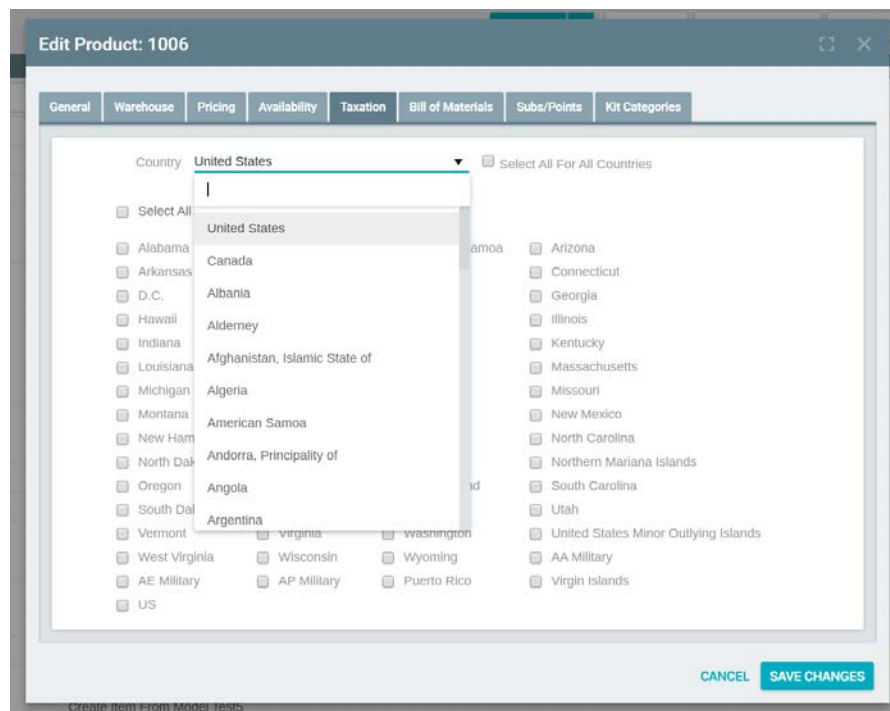


- If there **is** a check mark in this box, the Taxation Tab will show that the item **will be taxed in all countries and regions**.

Choosing a Specific Location for Product Taxation

Taxable in all Countries / Regions

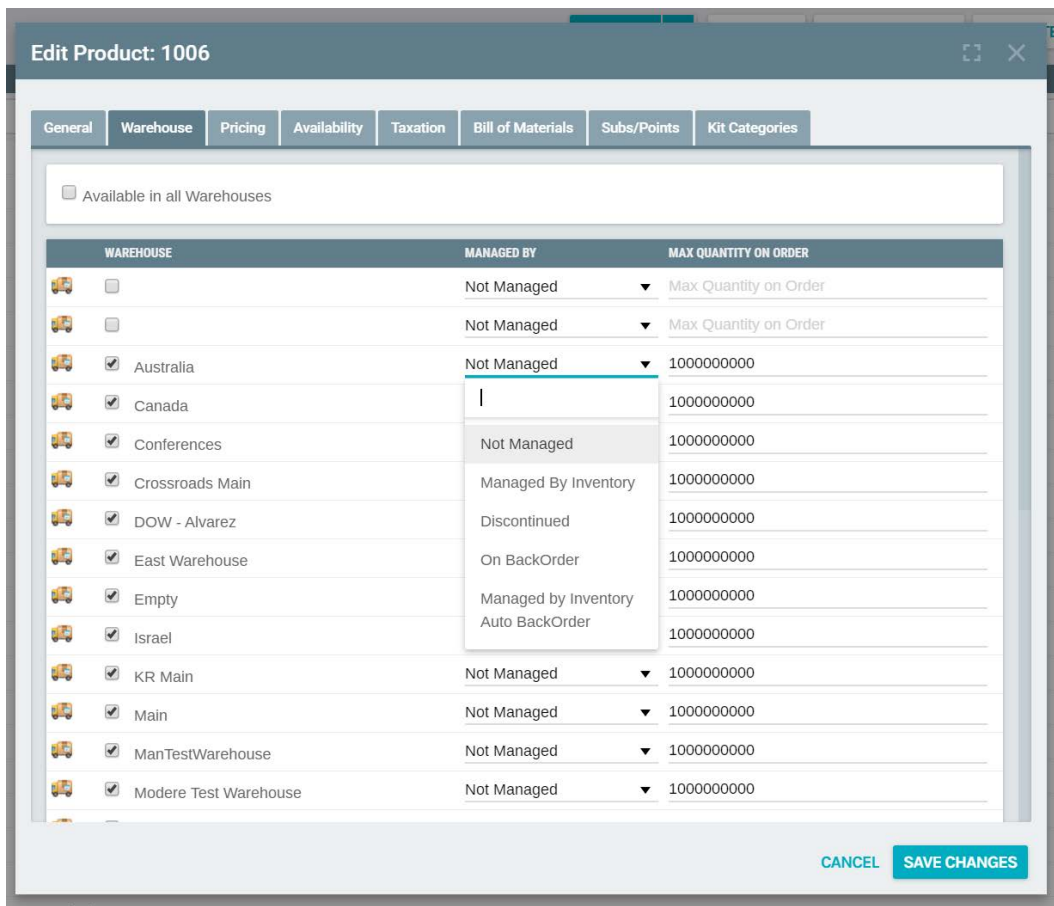
- If there is **not** a check mark in this box, the Taxation Tab **will allow you to choose the exact locations** where the product will be taxed around the world.



- Choose a country by clicking the **arrow next to the word Country** and **select and Highlight the desired country**. The Taxation Tab will change for any country that is selected.
- The locations with the check marks will be the places the product will be taxed.
- Click **SAVE CHANGES**
- The tax is **connected to the Ship to: Address**.
- All locations checked marked will be taxed according to **Domestic Tax Tables** or **International tax rules** found in your **Order Calculation Engine**.

SELECTING A WAREHOUSE

- You can select the **warehouse** or **warehouses a product can be shipped from** by clicking the **box next to this specification** in the **General Tab**.
 - Available in all Warehouses
- If there **is** a check mark in this box, the **Warehouse Tab** will show that the item ships from all the warehouses.
- **Manage a warehouse** by clicking the arrow under the **Managed By section** and **select and Highlight the Management style** for the product in the particular warehouse.



Edit Product: 1006

General Warehouse Pricing Availability Taxation Bill of Materials Subs/Points Kit Categories

Available in all Warehouses

WAREHOUSE	MANAGED BY	MAX QUANTITY ON ORDER
<input type="checkbox"/>	Not Managed	Max Quantity on Order
<input type="checkbox"/>	Not Managed	Max Quantity on Order
<input checked="" type="checkbox"/> Australia	Not Managed	1000000000
<input checked="" type="checkbox"/> Canada		1000000000
<input checked="" type="checkbox"/> Conferences	Not Managed	1000000000
<input checked="" type="checkbox"/> Crossroads Main	Managed By Inventory	1000000000
<input checked="" type="checkbox"/> DOW - Alvarez	Discontinued	1000000000
<input checked="" type="checkbox"/> East Warehouse	On BackOrder	1000000000
<input checked="" type="checkbox"/> Empty	Managed by Inventory Auto BackOrder	1000000000
<input checked="" type="checkbox"/> Israel		1000000000
<input checked="" type="checkbox"/> KR Main	Not Managed	1000000000
<input checked="" type="checkbox"/> Main	Not Managed	1000000000
<input checked="" type="checkbox"/> ManTestWarehouse	Not Managed	1000000000
<input checked="" type="checkbox"/> Modere Test Warehouse	Not Managed	1000000000

CANCEL SAVE CHANGES

- The ReOrder Level can also be inputted in the **ReOrder Level Box** next to the **desired warehouses.**
- Click **SAVE CHANGES**
- **If there is not a check mark in this box, the Warehouse Tab will show no warehouses selected. The warehouse must be selected by clicking in the box next to the desired warehouse.**
- Manage a warehouse by clicking the **arrow under the Managed By section** and **select and Highlight** the Management style for the product in the particular warehouse.
- The ReOrder Level can also be inputted in the ReOrder Level Box next to the desired warehouses Click OK

ALLOWING FOR CUSTOMER UPGRADE

- You can allow **different customer type upgrades** by clicking the **box next to this specification** in **the General Tab** of the **New Product Screen.**
- If there is **not** a check mark in this box, the **Customer Type box will not allow you** to choose a customer type for the upgrade.

Upgrade Customer Type Distributor ▼

- If there **is** a check mark in customer type upgrade box, the **Customer Type box will allow you** to choose a customer type for the upgrade.

Create Payment Card	<input type="checkbox"/>	-- Not Selected--	▼
Create Gift Card	<input type="checkbox"/>	Referral Points	▼
Upgrade Customer Type	<input checked="" type="checkbox"/>	Distributor	▼
Create Recurring Order	<input type="checkbox"/>		
Stop Increment			
Metal Type		Distributor	
AutoShipItem		CustomerType1	
Discount %		IL Distributor	
Tax Classification		Brand Ambassador	
GL Code		Retail Customer	
KR Description		CA Distributor	
Category		AU Distributor	
		SG Distributor	
		Preferred Customer	
		Employee	

CHANGES

ALLOWING FOR RECURRING ORDER

- You can allow for a **Recurring Order** by clicking the **box next to this specification** in the **General Tab** of the **New Product Screen**.
- When there is a checkmark in this box the product can be sent to a customer on a **periodic schedule**.

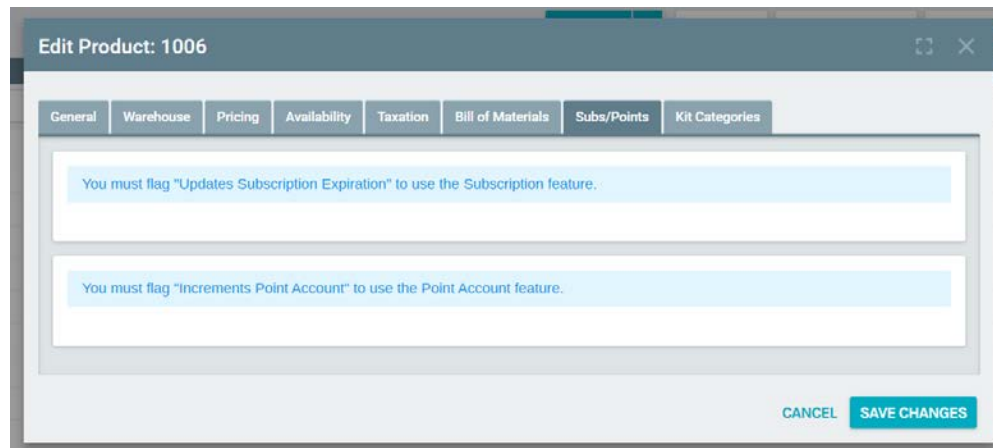
Allow for Recurring Order

UPDATES SUBSCRIPTIONS EXPIRATION

- You can allow for **Updates of subscriptions Expiration** by clicking the **box next to this specification** in the **General Tab** of the **New Product Screen**.

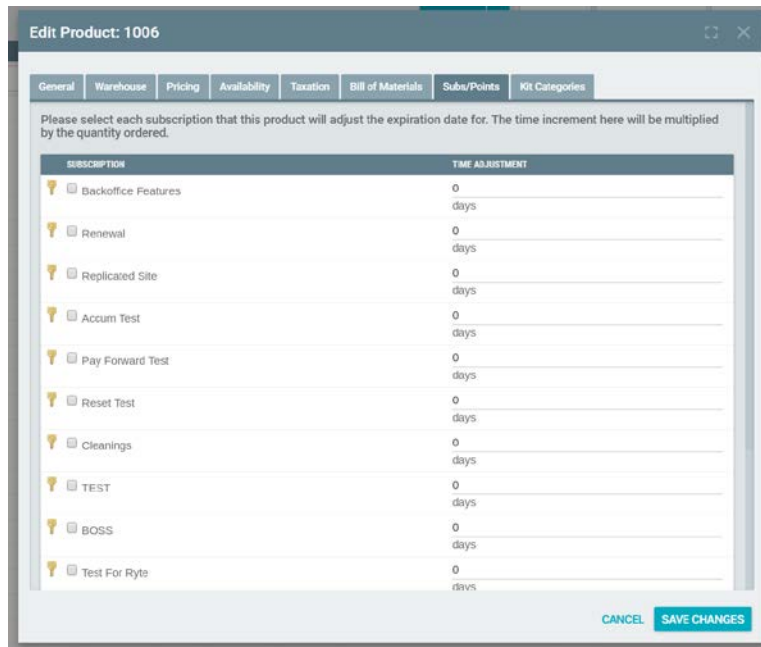
Advance Subscription(s) (detail under Subs tab)

- If there is **not** a check mark in this box, the **Sub/Points Tab will not allow** you to update subscriptions expirations.



Advance Subscription(s) (detail under Subs tab)

- If there **is** a check mark in this box in the **General Tab**, the top half of the **Sub/Point Tab will allow you to select each subscription** that this product will adjust the expirations date for. The time increment here will be multiplied by the quantity ordered.



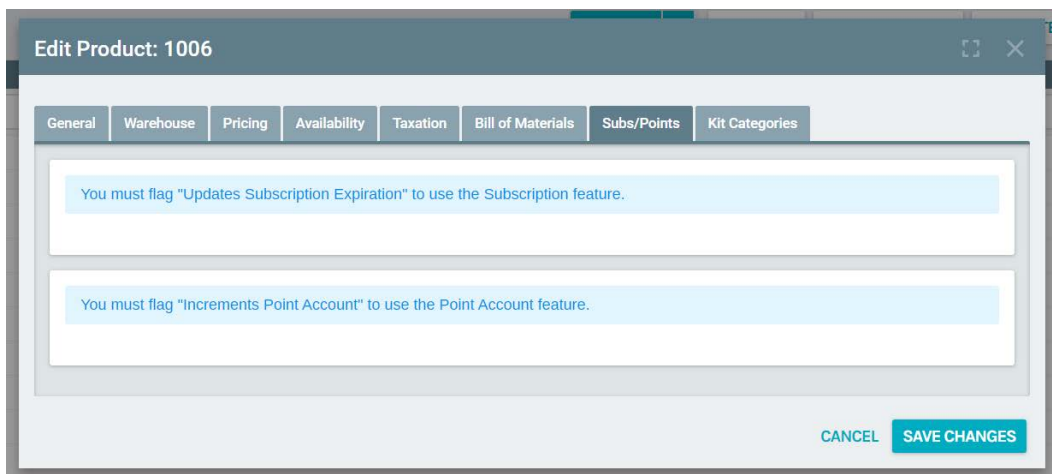
Subscriptions table:

SUBSCRIPTION	TIME ADJUSTMENT
<input type="checkbox"/> Backoffice Features	0 days
<input type="checkbox"/> Renewal	0 days
<input type="checkbox"/> Replicated Site	0 days
<input type="checkbox"/> Accum Test	0 days
<input type="checkbox"/> Pay Forward Test	0 days
<input type="checkbox"/> Reset Test	0 days
<input type="checkbox"/> Cleanings	0 days
<input type="checkbox"/> TEST	0 days
<input type="checkbox"/> BOSS	0 days
<input type="checkbox"/> Test For Ryte	0 days

- Click **SAVE CHANGES**

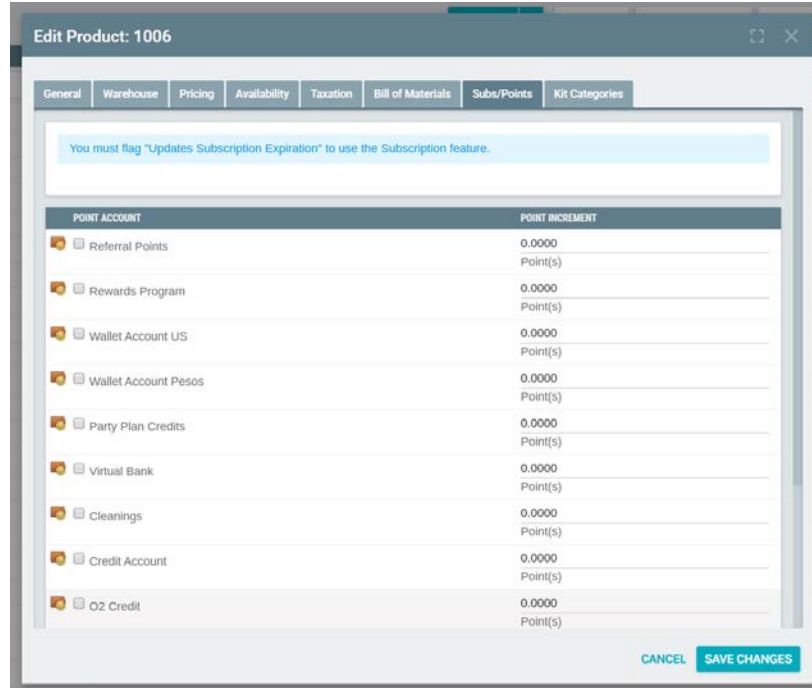
INCREMENTS POINTS ACCOUNTS

- You can allow for **increments on a points account** by clicking the **box next to this specification** in the **General Tab** of the **New Product Screen**.
 - Increment Point Account(s) (detail under Points tab)
- If there is **not** a check mark in this box in the **General Tab page**, the **Sub/Points Tab will not allow** you to Increment Point Accounts.



- Increment Point Account(s) (detail under Points tab)

- If there **is** a check mark in this box in the **General Tab** page, the **Sub/Points Tab** will allow you to Increment Point Accounts.



POINT ACCOUNT	POINT INCREMENT
<input type="checkbox"/> Referral Points	0.0000 Point(s)
<input type="checkbox"/> Rewards Program	0.0000 Point(s)
<input type="checkbox"/> Wallet Account US	0.0000 Point(s)
<input type="checkbox"/> Wallet Account Pesos	0.0000 Point(s)
<input type="checkbox"/> Party Plan Credits	0.0000 Point(s)
<input type="checkbox"/> Virtual Bank	0.0000 Point(s)
<input type="checkbox"/> Cleanings	0.0000 Point(s)
<input type="checkbox"/> Credit Account	0.0000 Point(s)
<input type="checkbox"/> O2 Credit	0.0000 Point(s)

- Click in the **box next to the Point Account** that is going to have point increments.
- Next specify the **amount of points** that will be incremented per purchase of the product.
- Click **OK**

ALLOWING PARTIAL AMOUNTS

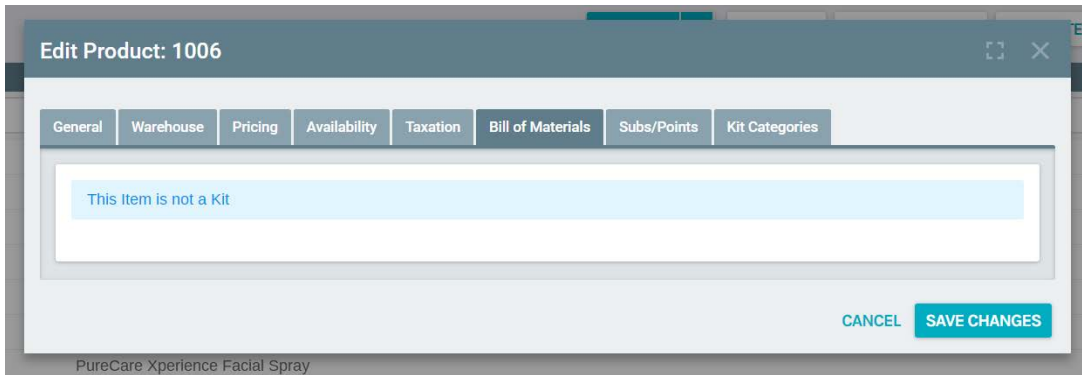
- If you plan to allow for **decimal quantities**, you would need to **check mark this**.
- For example, if I can order 2.5 units of a product, **this feature needs to be checked**.

ITEM IS A KIT

- You can create **Items as kits** or **group products** that are sold together as one by **clicking the box next to this specification** in the **General Tab** of the **New Product Screen**.

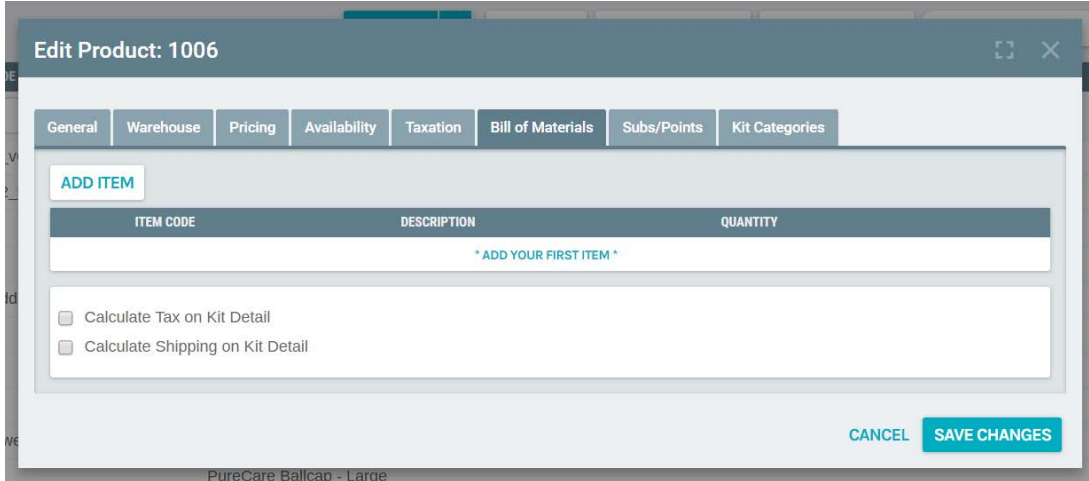
Item Type Standard ▼

- If there is **not** a check mark in this box in the General Tab page, the **Bill of Material Tab will show** that the **Item is not a Kit**.



Item Type Static Kit ▼

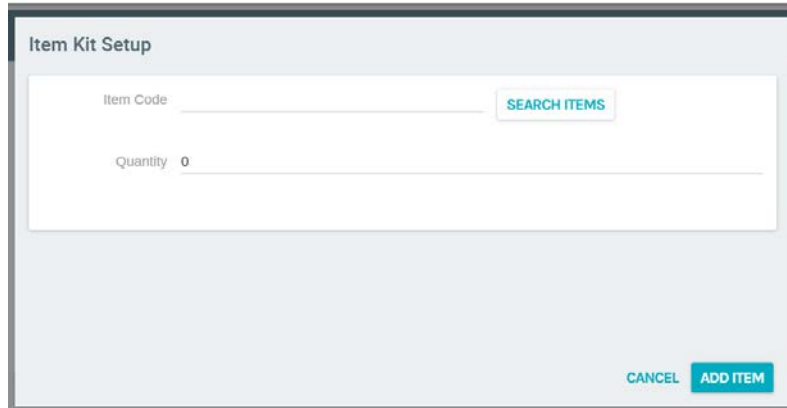
- If there **is** a check mark in this box in the General Tab page, the **Bill of Material Tab will allow you to create the Kit**.



- You can **Add, Remove, or Edit an Item in a Kit** by clicking on the **specific Buttons** on the top of the **Bill of Material Tab Screen**.
- When **all of the Items and Quantities** have been selected, your Kit will be created.
- Click **OK**

ADDING A PRODUCT TO A KIT

- You can **add a product to a kit** by clicking on the **Add Item Button** in the **Bill of Materials Tab Screen**. The **Add Product Screen** will appear.

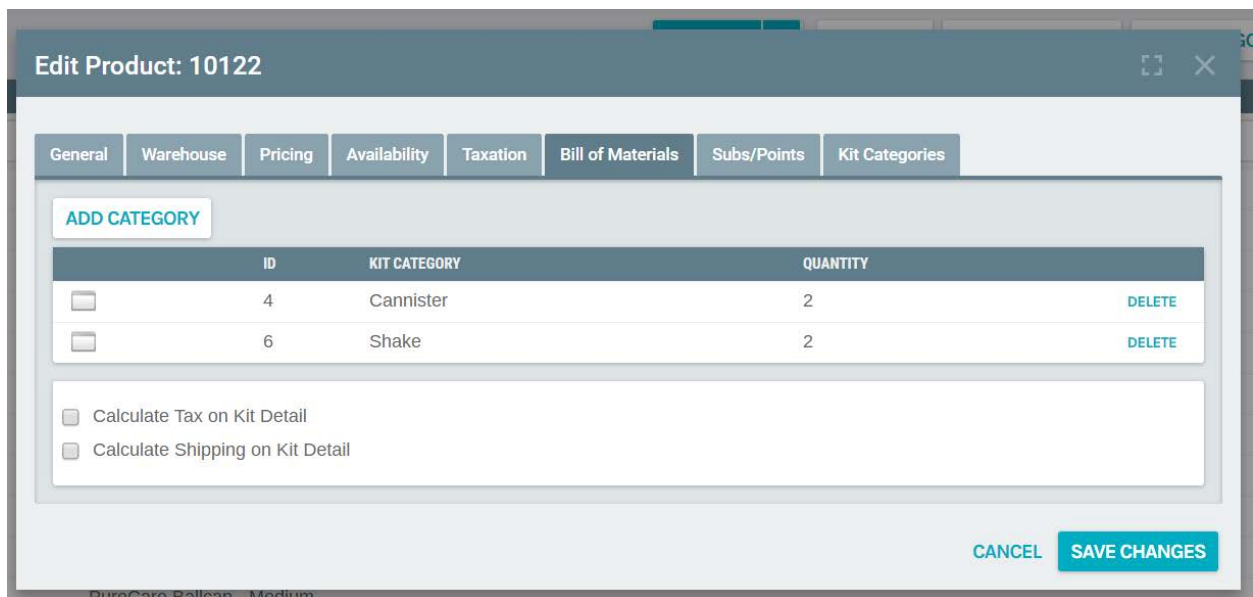


The dialog box titled "Item Kit Setup" contains two input fields: "Item Code" and "Quantity". The "Quantity" field has a value of "0". A "SEARCH ITEMS" button is located to the right of the "Item Code" field. At the bottom right, there are "CANCEL" and "ADD ITEM" buttons.

- Enter the **Item Code** and the **Quantity**.
- Click **Add Item**
- The Item will appear on the **Bill of Materials Tab Screen** as **part of the Kit**.

REMOVING A PRODUCT FROM A KIT

- You can **remove a product from a kit** in the **Bill of Materials Tab**.
- You can **remove a product from a kit** by clicking on the **Delete Button**,

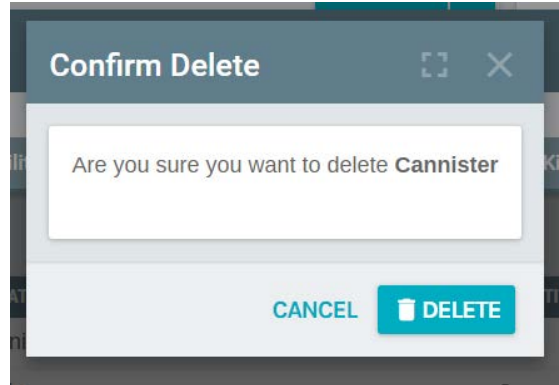


The screenshot shows the "Edit Product: 10122" interface with the "Bill of Materials" tab selected. The "Kit Categories" section contains a table with the following data:

	ID	KIT CATEGORY	QUANTITY	
<input type="checkbox"/>	4	Cannister	2	DELETE
<input type="checkbox"/>	6	Shake	2	DELETE

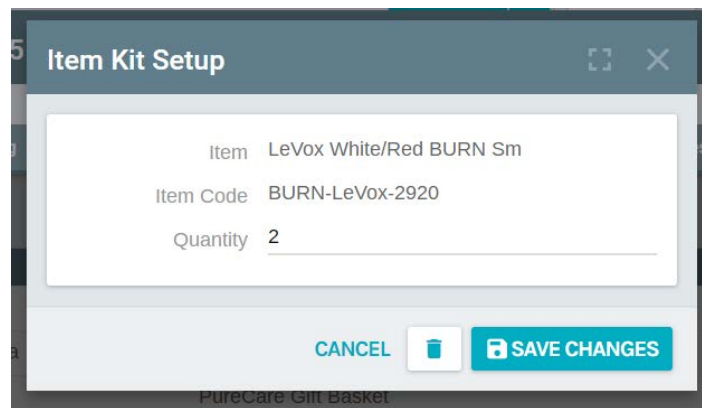
Below the table, there are two checkboxes: "Calculate Tax on Kit Detail" and "Calculate Shipping on Kit Detail". At the bottom right, there are "CANCEL" and "SAVE CHANGES" buttons.

- Click **Save Changes** when the screen prompts you and the Item will be removed from the kit.



EDITING A PRODUCT IN A KIT

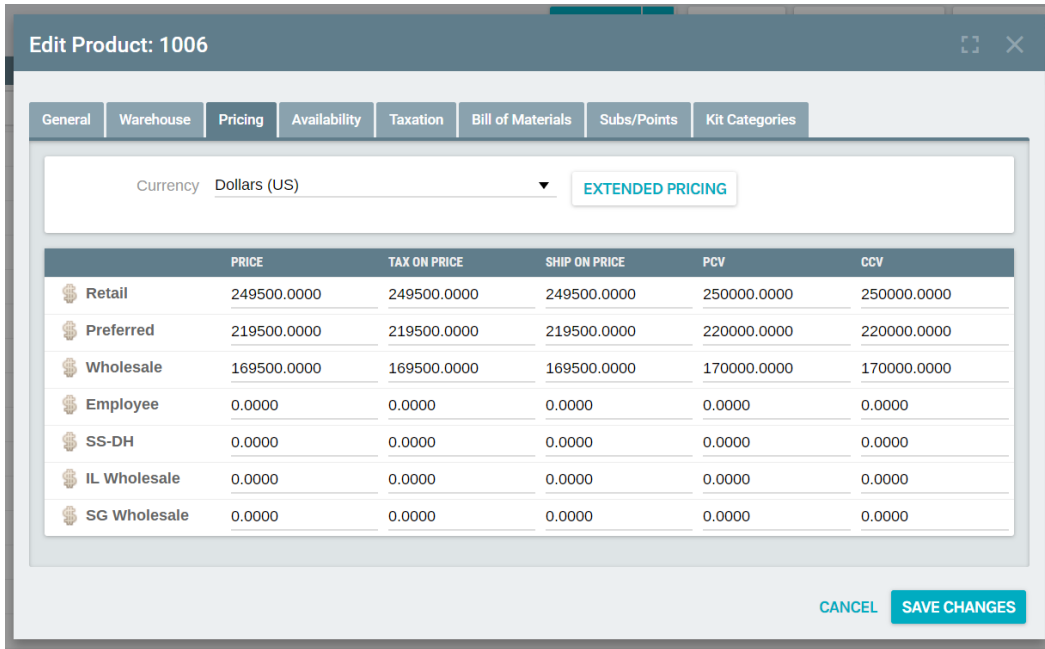
- You can **Edit a product from a kit** in the **Bill of Materials Tab**.
- You can **edit a product from a kit** by **highlighting the product** then clicking on the **Edit Button**, in the **Bill of Materials Tab Screen**



- The Edit Product Screen will open. **Adjust the Quantity**. Then
- Click **OK**
- The Product will be Edited in the Kit.
- This **edit will show** on the **Bill of Materials Tab Screen**.

PRICING TAB

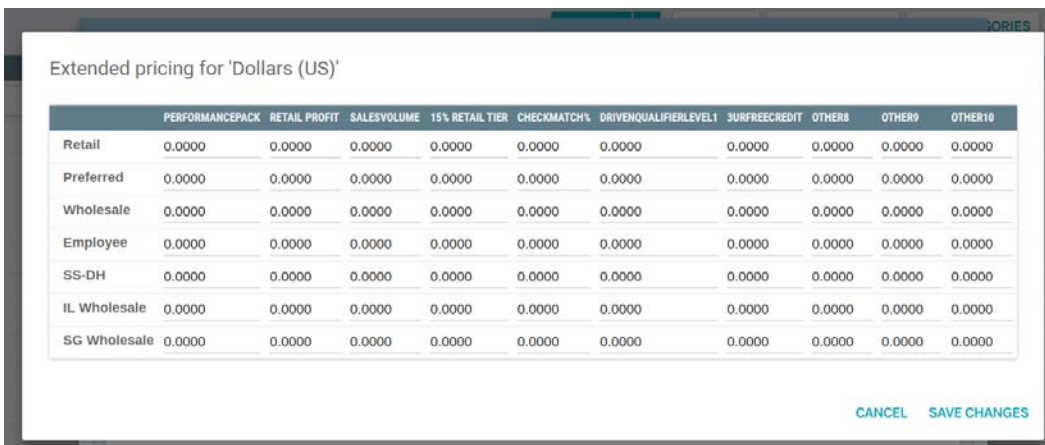
- The Pricing Tab allows you to **set the price of an Item** at different levels for **different customer Types**.



- You must **first select the Currency** your product will be sold in. This can be done by **clicking the arrow** next to where it says **Currency** and **highlighting the selected currency**.
- The **BV** and **CV Prices** can be set.
- You can set the **TOP** or **Tax on Product**.
- The **SOP** or **Ship on Price** can also be set in the **Pricing Tab Screen**.

EXTENDED PRICING

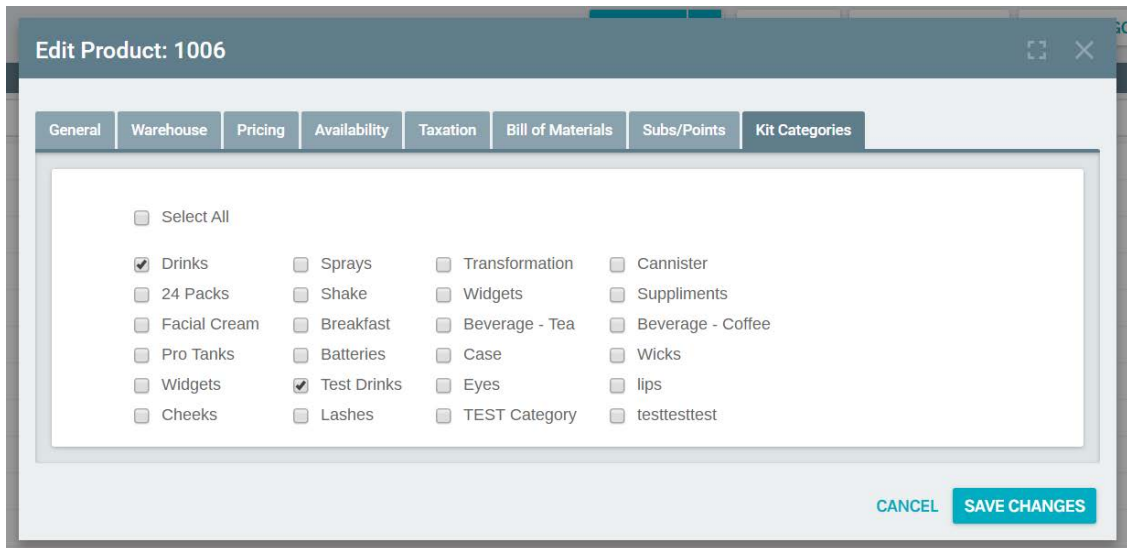
- You can **access Extended Pricing** by clicking on the **Extend Pricing Button** in the **Pricing Tab**. You can **define up to 5 additional extended price types**.
- The **Extended Pricing Screen** will open.



- Enter the **Retail Difference** and **Bonus Pricing** for the **selected customer types**.
- Click **Save Changes**

KIT CATEGORIES TAB

- This tab allows you to associate the item to any of your **dynamic kit categories** so that the item will **appear in any dynamic kit drop down selection**.



Select All
 Drinks Sprays Transformation Cannister
 24 Packs Shake Widgets Suppliments
 Facial Cream Breakfast Beverage - Tea Beverage - Coffee
 Pro Tanks Batteries Case Wicks
 Widgets Test Drinks Eyes lips
 Cheeks Lashes TEST Category testtestest

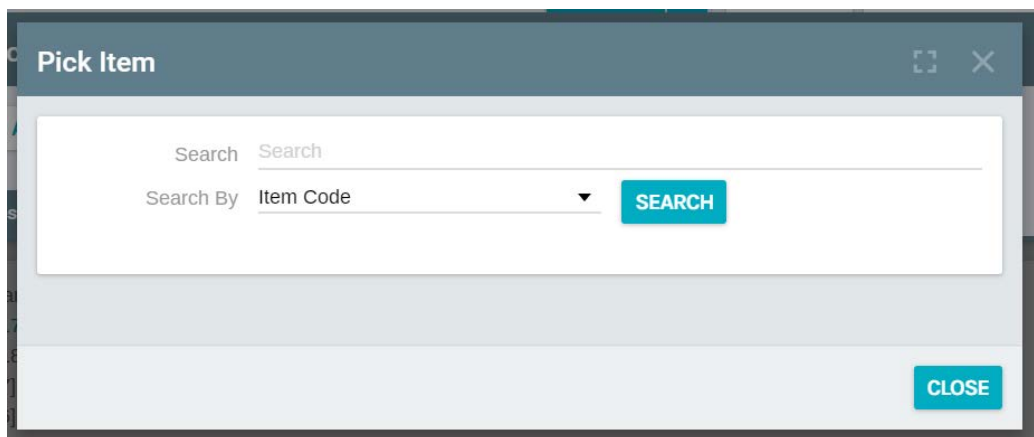
CANCEL **SAVE CHANGES**

WEB CATEGORIES

- Once an item has been created, you can then make this item **available for the web** by **adding it to the applicable Web Categories**.
- In the top right tool bar, click on **Web Categories** and the popup screen will appear.



- **Select the category** you need to add the item to in order to **highlight it** and then **click on Add Product button**. A search screen will appear.



-
- **Find the item** you want to add and **double click on the item**. It will then **appear on the list under the category**.
 - You can do this as many times as you need if the item belongs to more than one category.
 - **Please keep in mind that the moment you add the item to the category, it will now appear on your website as long as other filter criteria is met (warehouse, price type, etc).**