



Terminate Customer

v1.0

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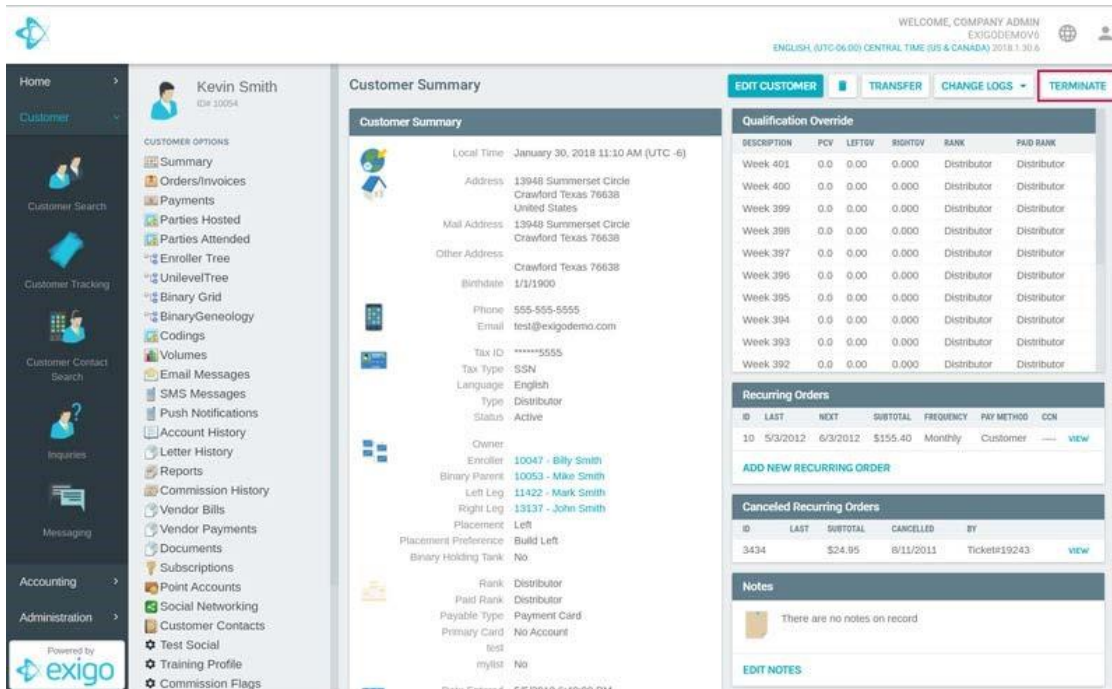
Terminate Customer

HOW DO I TERMINATE SOMEONE?

Within Exigo Admin you can terminate a customer based on your company's selection logic. You can terminate a customer **directly from their customer screen**. This allows you to confirm the process rules have been applied.

NOTE: If you do not see the **TERMINATE** button in the screen shot below, please see your company admin. This feature is enabled/disabled with user rights.

To terminate a customer, navigate to Customer > Customer Search > select desired customer and click TERMINATE in the upper right hand corner of the screen.



The screenshot displays the 'Customer Summary' page for Kevin Smith (ID# 10054). The page includes a navigation sidebar on the left, a main content area with customer details, and a right-hand panel with various tables and buttons. The 'TERMINATE' button is highlighted in a red box in the top right corner of the main content area.

Customer Summary

Local Time: January 30, 2018 11:10 AM (UTC -6)

Address: 13948 Summerset Circle
Crawford Texas 76638
United States

Mail Address: 13948 Summerset Circle
Crawford Texas 76638

Other Address: Crawford Texas 76638

Birthdate: 1/1/1900

Phone: 555-555-5555

Email: test@exigodemo.com

Tax ID: *****5555

Tax Type: SSN

Language: English

Type: Distributor

Status: Active

Owner: 10047 - Billy Smith

Enroller: 10053 - Mike Smith

Binary Parent: 11422 - Mark Smith

Left Leg: 13137 - John Smith

Right Leg: 13137 - John Smith

Placement: Left

Build Left: No

Placement Preference: No

Binary Holding Tank: No

Rank: Distributor

Paid Rank: Distributor

Payable Type: Payment Card

Primary Card: No Account

test

mylist: No

Date Entered: 5/5/2010 8:40:00 PM

Qualification Override

DESCRIPTION	PCV	LEFTOV	RIGHTOV	RANK	PAID RANK
Week 401	0.0	0.00	0.000	Distributor	Distributor
Week 400	0.0	0.00	0.000	Distributor	Distributor
Week 399	0.0	0.00	0.000	Distributor	Distributor
Week 398	0.0	0.00	0.000	Distributor	Distributor
Week 397	0.0	0.00	0.000	Distributor	Distributor
Week 396	0.0	0.00	0.000	Distributor	Distributor
Week 395	0.0	0.00	0.000	Distributor	Distributor
Week 394	0.0	0.00	0.000	Distributor	Distributor
Week 393	0.0	0.00	0.000	Distributor	Distributor
Week 392	0.0	0.00	0.000	Distributor	Distributor

Recurring Orders

ID	LAST	NEXT	SUBTOTAL	FREQUENCY	PAY METHOD	CCN
10	5/3/2012	6/3/2012	\$155.40	Monthly	Customer	VIEW

ADD NEW RECURRING ORDER

Cancelled Recurring Orders

ID	LAST	SUBTOTAL	CANCELLED	BY
3434		\$24.95	8/11/2011	Ticket#19243

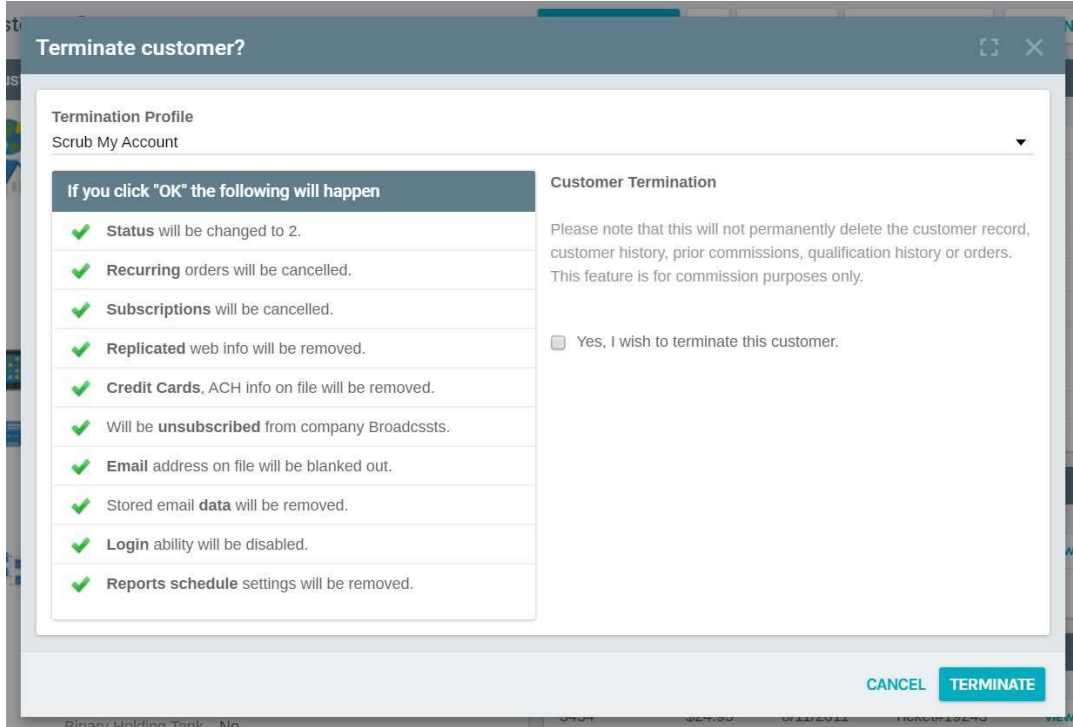
Notes

There are no notes on record

EDIT NOTES

Once you click on this link, a popup will appear to confirm the termination. **Review the information** and check the **“Yes”** box and click on **TERMINATE**. Select the **Termination profile** from the dropdown menu you wish to run against this Customer.

NOTE: This termination feature will not support mass updates of terminated customers. You would need to create a support ticket and request the mass update and provide the logic or selection criteria for the update.



HOW DO I SETUP TERMINATION RULES FOR THE COMPANY?

The termination routine is processed based on a set of rules enabled by your selection criteria.

You can set these up for your company by going to **Administration > Settings**. In the bottom of the right column, you will see a section for **Customer Termination Settings**. Click on **Modify Termination Settings**.

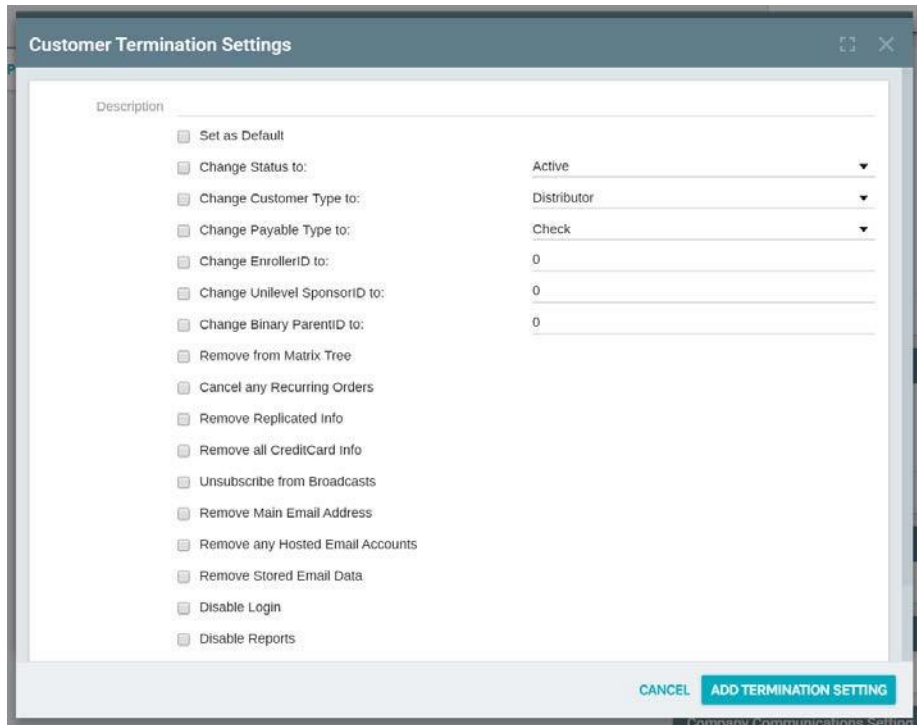
You can set up multiple termination profiles. Each profile would execute different processes based on options selected.

From the popup, you can check the rules that you would like to have processed when a customer is terminated.

NOTE: the option for Change Binary ParentID to: will only appear for customers who are running a binary compensation plan.

If you use the **Change EnrollerID** or the **Unilevel SponsorID**, please note that when the customer is moved to this node in the tree, any downline that shows the terminated customer as their enroller or sponsor will be reassigned to the terminated customer's enroller or sponsor.

For example, customer Jane Doe enrolled John Smith. John Smith enrolled Betty Smith. If John Smith is terminated, then the enroller for Betty Smith will change from John Smith to Jane Doe.



Description	Value
<input type="checkbox"/> Set as Default	
<input type="checkbox"/> Change Status to:	Active
<input type="checkbox"/> Change Customer Type to:	Distributor
<input type="checkbox"/> Change Payable Type to:	Check
<input type="checkbox"/> Change EnrollerID to:	0
<input type="checkbox"/> Change Unilevel SponsorID to:	0
<input type="checkbox"/> Change Binary ParentID to:	0
<input type="checkbox"/> Remove from Matrix Tree	
<input type="checkbox"/> Cancel any Recurring Orders	
<input type="checkbox"/> Remove Replicated Info	
<input type="checkbox"/> Remove all CreditCard Info	
<input type="checkbox"/> Unsubscribe from Broadcasts	
<input type="checkbox"/> Remove Main Email Address	
<input type="checkbox"/> Remove any Hosted Email Accounts	
<input type="checkbox"/> Remove Stored Email Data	
<input type="checkbox"/> Disable Login	
<input type="checkbox"/> Disable Reports	

HOW DO I “UN” TERMINATE A CUSTOMER?

All changes made at the time of termination will be recorded in the customer change log.

You will need to review the information and **manually edit** the **customer record**, the **login information** and the **web information** and change the data values **to match what existed prior to the termination**.

You will also need to use the **Move feature** in the **Tree tool** to put the customer back into the tree and then reassign their downline back to the original enroller or sponsor.