



Terminate Customer

v1.0

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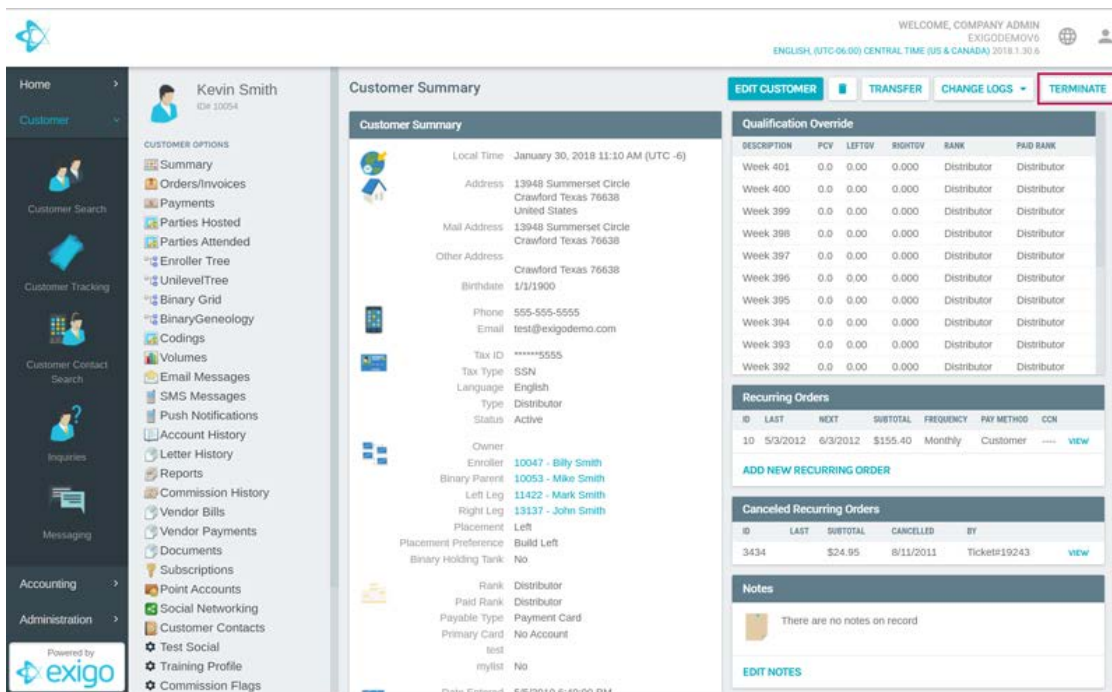
Terminate Customer

HOW DO I TERMINATE SOMEONE?

There is a feature in Exigo that is available with User permissions that will terminate customers based on company selection logic. You can terminate a customer **directly from their customer screen** so that you can confirm the process rules have been applied.

You can see it on the **User Menu** called "**Allow Terminate Customer**" when you **edit your permissions** in the **Customer** section.

Once enabled, go to the **customer screen** and on the top row of buttons there is a **new button for Terminate Customer**.



The screenshot shows the Exigo Customer Summary interface for Kevin Smith (ID# 10054). The top navigation bar includes 'EDIT CUSTOMER', 'TRANSFER', 'CHANGE LOGS', and 'TERMINATE' (highlighted with a red box). The main content area is divided into two columns: 'Customer Summary' and 'Qualification Override'.

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
- Placement Preference: Build Left
- Binary Holding Tank: No
- Rank: Distributor
- Paid Rank: Distributor
- Payable Type: Payment Card
- Primary Card: No Account
- mylist: test
- mylist: No
- Date Entered: 5/5/2010 6:48:00 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

Canceled Recurring Orders

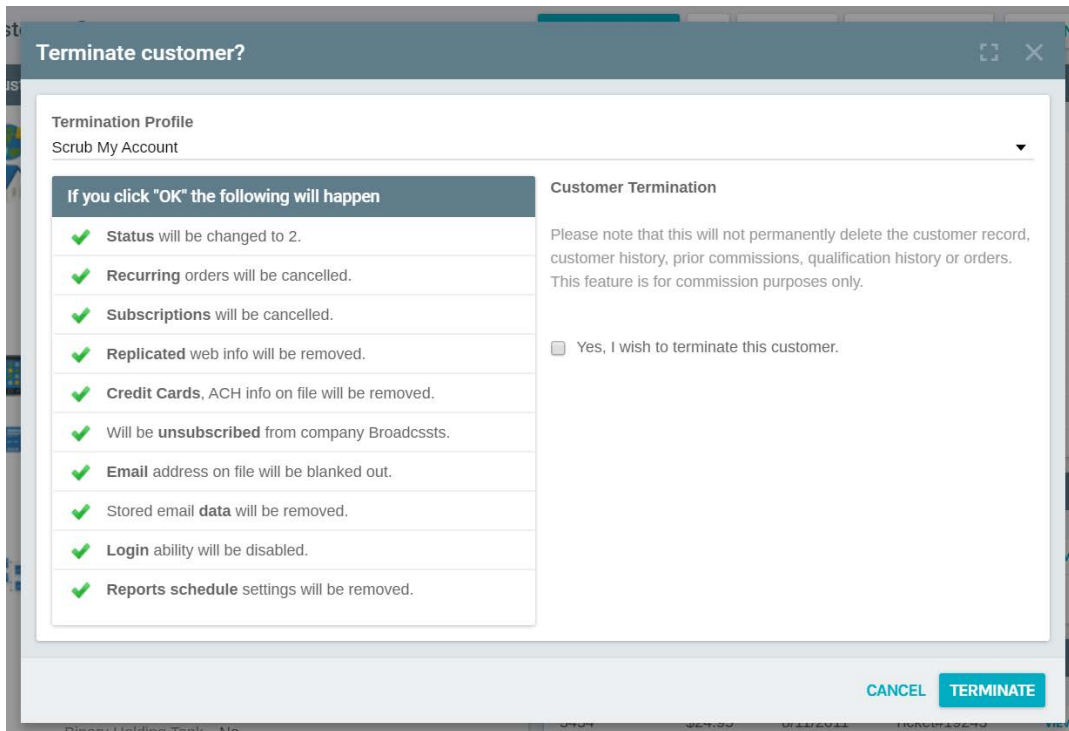
ID	LAST	SUBTOTAL	CANCELLED	BY
3434		\$24.95	8/11/2011	Ticket#19243

Notes

There are no notes on record

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 OK.

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.

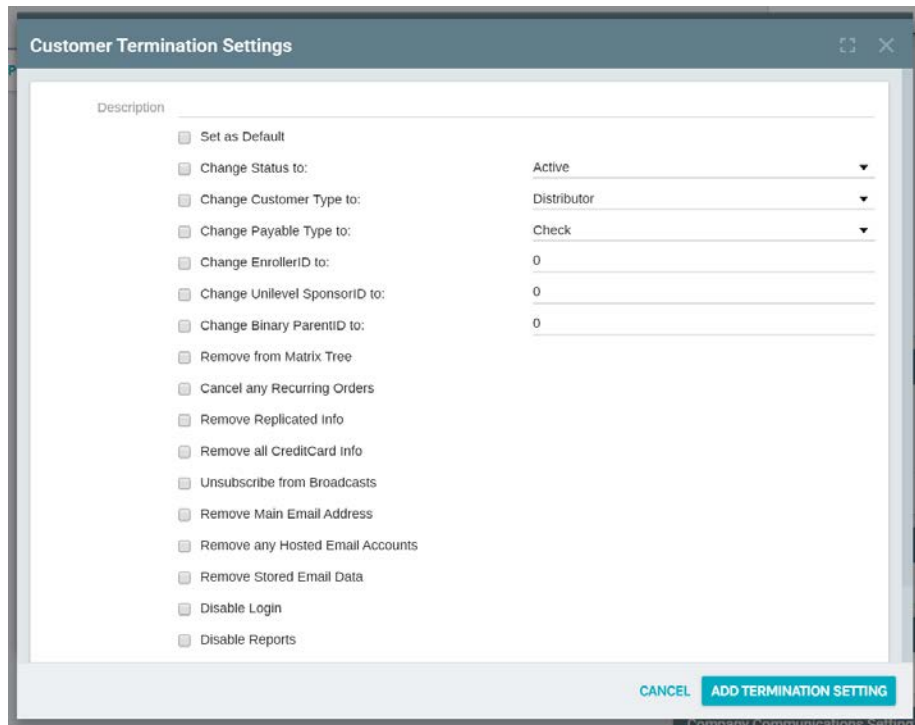
You can set these up for your company by going to **Administration>>Settings**. In the bottom of the right column, you will see a section for **Customer Termination Settings**. Click on **Modify Termination Settings**.

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.



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.