



Point Accounts

v 1.0

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Point Accounts can be used in Exigo as part of a loyalty or reward program or to manage a virtual bank or wallet program where points can be created from commission earnings and then used to pay for product purchases or autoships.

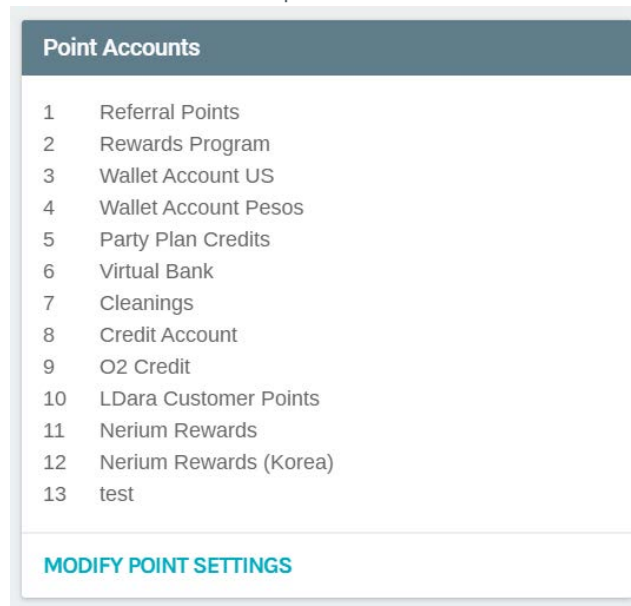
Loyalty/Reward Programs – points can be awarded based on the items that are purchased on an order using the Item configuration settings. Points can also be awarded for an order purchase based on the amount of the order. Custom logic can be added to the order calculation engine based on rules that you provide. In some instances, custom logic can also be added to the commission program to award points based on rank advancement or other qualification rules.

Virtual Bank or Wallet Programs – commission earnings can be converted to points so they can be used to pay for product or autoships. Customers can request withdrawals from their point account and get paid in the next commission payout process. The withdrawal process is managed in the back office web code. The Payable Type value on a customer record would determine how the withdrawal would be paid.

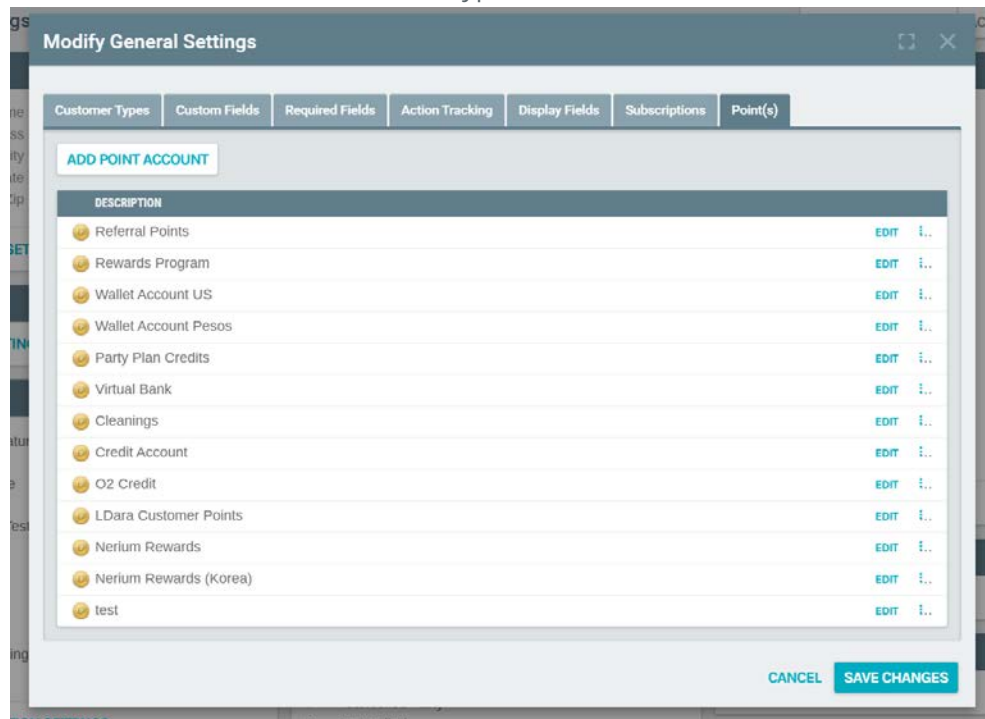
How to Define a Point Account

The first step is to setup the point account to be used for the program. Please keep in mind that the order entry system will only recognize points as currency from the first point account that is defined. So, if you plan to have more than one point account type, please make sure the one to be used for product purchases is created first.

1. Go to Administration > Settings and click on “Modify Point Settings” shortcut link in the Subscriptions section.

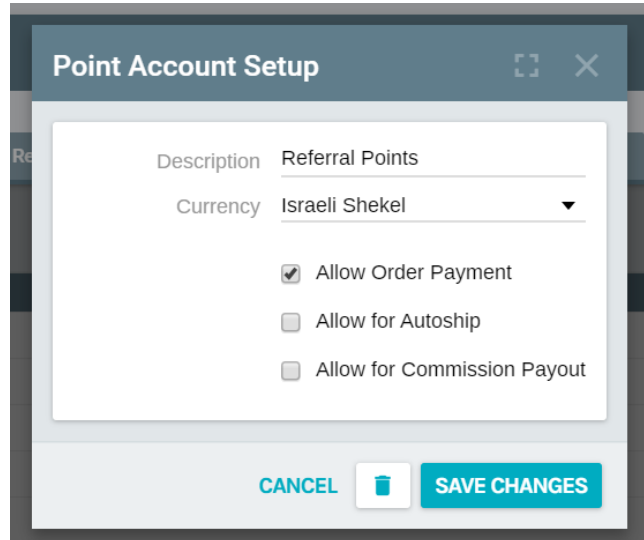


2. Image
3. From the Customer Settings popup screen, go to the Points Tab.
4. In the Point Account Types: section, Click on “Add”.



5. From the Add/Edit Point Account popup screen, enter the following information:
 - a. Description of the Point Account.
 - b. Select Currency to be used if planning to use for monetary purposes.
 - c. Allow Order Payment – check if you want to be able to use this point account to pay for product.

- d. Allow for Autoship – check if you want this account used to pay for Autoships.
- e. Allow for Commission Payout – check if you want this account used to load commission earnings as points.



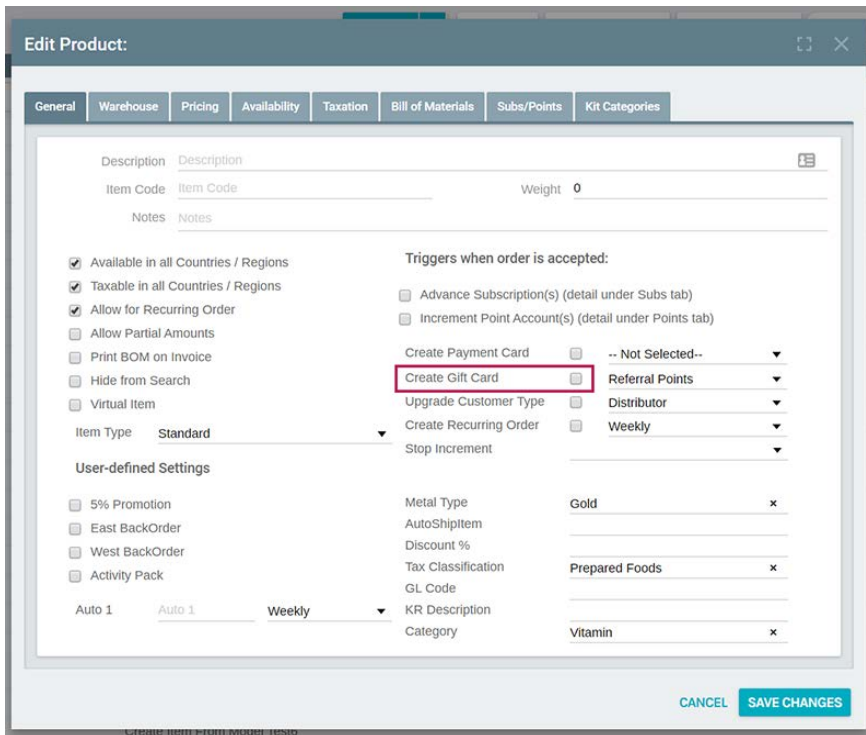
6. Click on OK to close the Customer Settings screen. You may now use this point account.

HOW TO CONFIGURE AN ITEM FOR AWARDING POINTS

You can configure item codes so that they award points each time they are purchased.

1. Go to Accounting > Items and click on “Add” in the upper right tool bar
2. From the New Product screen, configure all properties of the Item on all tabs of the screen.

- Go to the General tab and select "Increment Point Accounts"



- Go to the "Subs/Points" tab and select the point account for this Item. An Item can apply to one or more point accounts. Specify the amount of points that should be awarded for each qty=1 purchase of this item.
- Click "OK" to close the New Product screen and save your settings.

Please note that the order has to be Accepted status or greater before the points are actually awarded from the purchase of the item code. When an order is Cancelled, the point transaction record is removed so that the point balance no longer includes the points from the cancelled order.

HOW TO CONVERT COMMISSION EARNINGS TO POINTS

Once the vendor bills are generated from a commission run that represents the earnings to be paid, the vendor bills need to be paid, a vendor payment created and the earnings amount transferred to the customer's point account.

There is a process for posting commission earning to vendor bills that can be modified with your custom logic for converting commission earnings to points. You will need to notify your commission programmer via a ticket request with the selection criteria for customers getting points instead of commission payouts. For example, you could provide logic like "for all customer type Representative, who live in either US or CA countries that have an opt in value set to yes (using a user defined field 12 to track this), please convert all earnings to points.

Once this logic is in place, then when you click on Accept for the commission run, all earnings for any customer that meets the selection criteria will have their vendor bill created with the status Pending Points.

At the time of your commission payout, you would want to convert the vendor bills that are Pending Points first and then pay out any remaining vendor bills.

From the Accounting>>Accounting Overview screen, click on the Pay with Points link

Bills To Pay - Israeli Shekel	
Within 10 days:	\$0.00
Within 15 days:	\$0.00
Within 30 days:	\$0.00
Within 15 days overdue:	\$0.00
15 days overdue:	\$0.00
30 days overdue:	\$0.00
60 days overdue:	\$0.00
90 days overdue:	\$1,250.00
PAY NET	
PAY WITH POINTS	

From the popup, enter the payment due date range of the vendor bills to be paid, the country and currency of the vendor bill. The Bills applicable will display on the bottom section of the screen, and you will be able to select the bills to convert.

Pay with Points ✖

Start Date: 1/31/2018 12:00:00 AM End Date: 2/2/2018 12:00 AM

Country: All Countries Currency: Dollars (US)

Reference: _____

Payment Date: 1/31/2018 1:21:02 PM

Bank: Usa (2) Bank Account

<input checked="" type="checkbox"/>	VENDOR ID	NAME	AMOUNT DUE
<input checked="" type="checkbox"/>	101780	Exigo Test	\$30.00

1 Bills Totaling \$30

CANCEL
PAY VENDORS POINTS

At this time, the vendor bills that were converted will be marked with Paid in Full status and a vendor payment will be created to be used for your 1099 processing. The points should now show in the customer's screen when you go to the Point Accounts view:

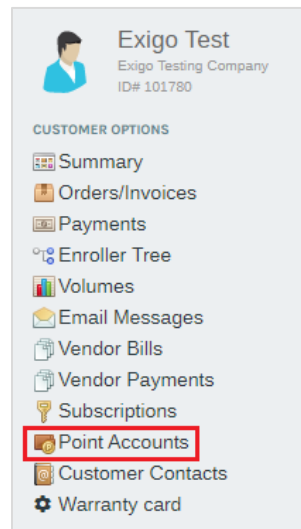
Point Account:	Wallet Account US
Point Balance:	276.00

Transaction Date	Points	Ref Type	Ref ID	Reason
8/6/2014	276.00			VendorBillID:18530

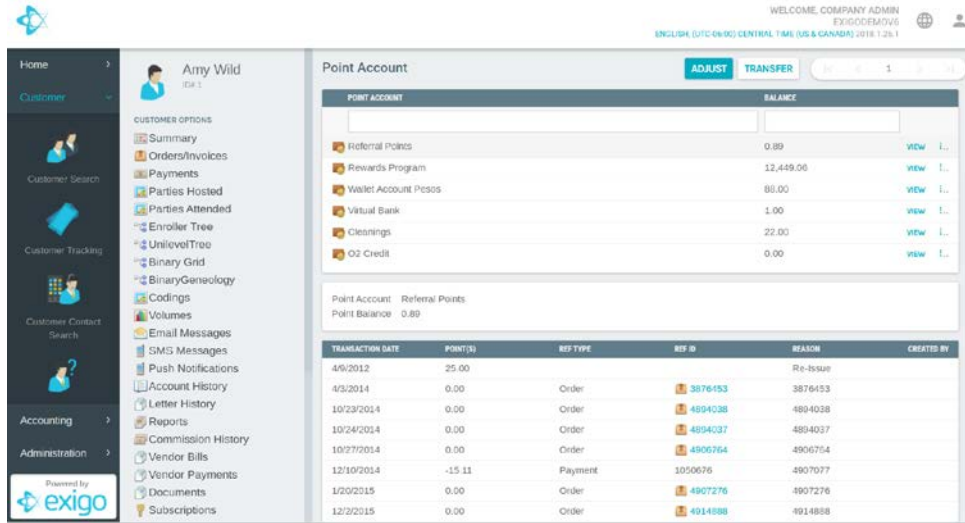
HOW TO CHECK THE BALANCE OF A POINT ACCOUNT IN EXIGO ADMIN

The history of how the points were awarded or redeemed can be found when clicking on the Point Account from the Customer screen and the point transaction records will be displayed. You can check the balance of a point account as well.

1. Go to Customer>>Customer Search and find the customer you want to check the point balance for.
2. From the customer's portal screen, go to the Customer Options left menu and select the Point Accounts option.



3. A list of Point Accounts that the customer has will be shown in the right results pane with the current point balance. At the bottom of the results pane, you will see the activity history for any point account that you click on from the results list.



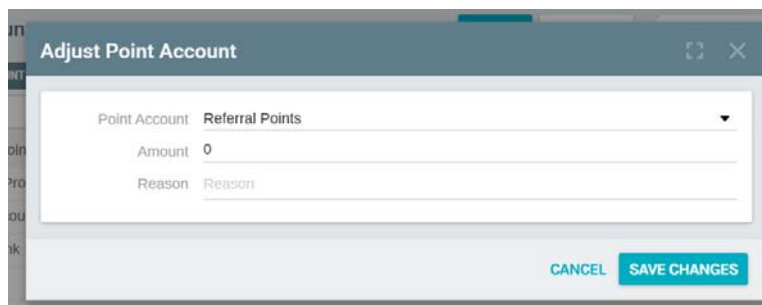
HOW TO CHECK THE BALANCE OF A POINT ACCOUNT FOR WEB CODE

Use the web service GetPointAccount from <http://api.exigo.com> to find the current balance for the point account and customer Id supplied.

HOW TO ADJUST POINT ACCOUNT BALANCES IN EXIGO ADMIN

You can make manual adjustments to add or remove points from a customer. Your user account will need to have permission to see this tool bar feature. From the customer's portal screen after you have clicked on the Point Accounts Customer Option, do the following:

1. Click on the Adjust icon in the top right tool bar and the Adjust Points popup screen will appear.



2. Select the point account from the drop down that you want to adjust points for.
3. Enter the amount of the point adjustment, positive if you want to add points, negative value if you want to take points way.
4. Enter a reason for the adjustment, realizing that this reason text may appear in the back office for the distributor.
5. Click on the OK button to save the adjustment.

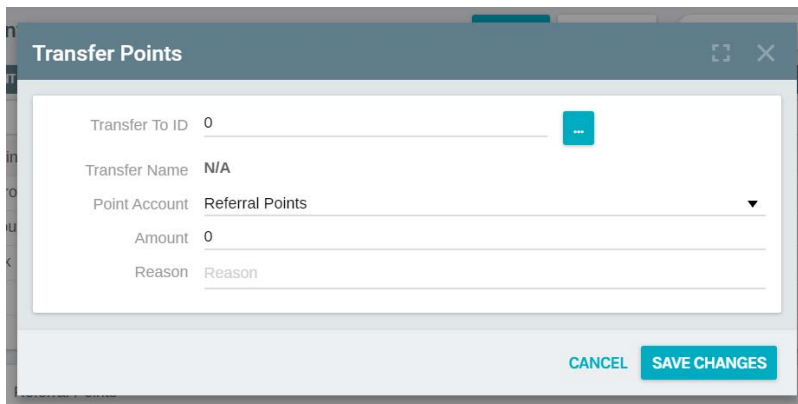
HOW TO ADJUST POINTS USING WEB CODE

Use the web service CreatePointTransaction from <http://api.exigo.com> to find the current balance for the point account and customer Id supplied. You can use the Transaction Type value to indicate if the transaction should deduct points from the balance using Redemption or Adjustment. A positive number for the Amount will add points to the account and a negative number will deduct points from the account. You would also use this web service to transfer points from a custom and award them to another customer.

HOW TO TRANSFER POINTS TO ANOTHER CUSTOMER IN EXIGO ADMIN

You can transfer points from a customer to another customer. Your user account will need to have permission to see this tool bar feature. From the customer’s portal screen after you have clicked on the Point Accounts Customer Option, do the following:

1. Click on the Transfer icon in the top right tool bar and the Transfer Points popup screen will appear.

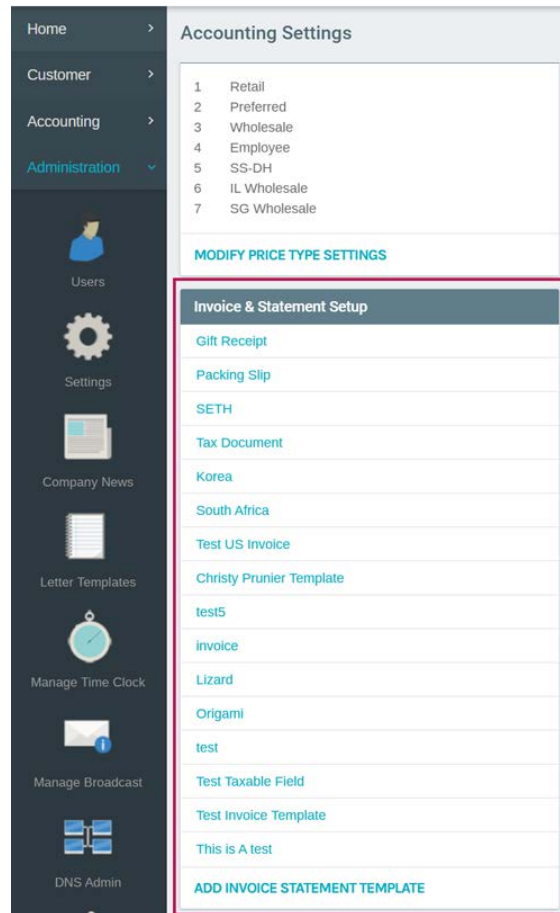


2. Enter the ID number of the customer that will be getting the points. You may also click on the binocular icon to search for the customer if you do not know their ID number.
3. Select the point account from the drop down that you want to Transfer points from.
4. Enter the amount of the point transfer as a positive amount.
5. Enter a reason for the transfer, realizing that this reason text may appear in the back office for the distributor.
6. Click on the OK button to save the transfer.

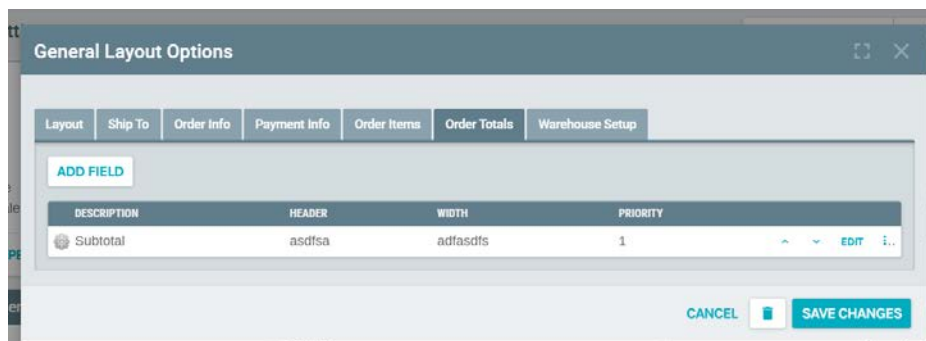
HOW TO GET POINTS EARNED FROM PRODUCT PURCHASES DISPLAYED ON ORDER INVOICE

If you have item codes configured to award points when they are purchased, you can show the points on the order invoice template.

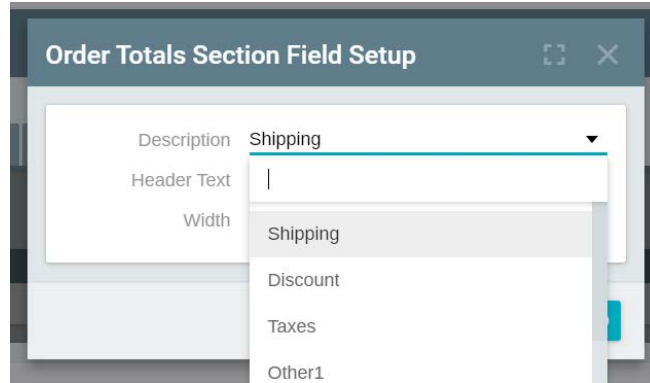
1. Go to Administration>>Settings and then click on Accounting Settings in the top right tool bar.
2. In the left column, go to Invoice & Statement Setup section and click on the invoice template that you would like to modify.



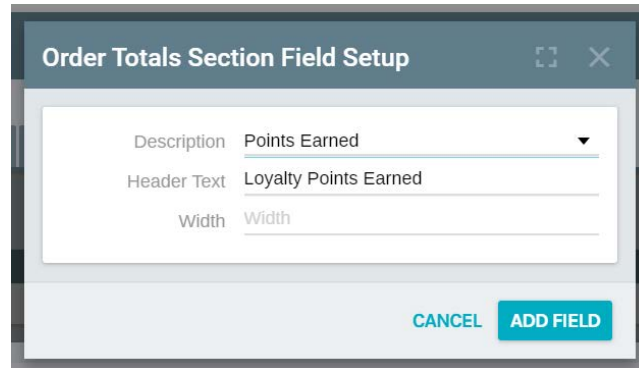
3. From the Invoice popup screen, go to the Order Totals tab.



4. Click on the Add button to go to the Template Item Options popup screen.



5. For the description field, use the drop down to scroll down to the Points Earned field.
6. Enter Header Text for the label you want displayed on the invoice.



7. Click on OK to save the field.
8. You can then use the Move Up or Move Down buttons on the Order Totals tab to position the field where you want it to appear.
9. Click on Save at the top left of the Order Template screen to save your settings.

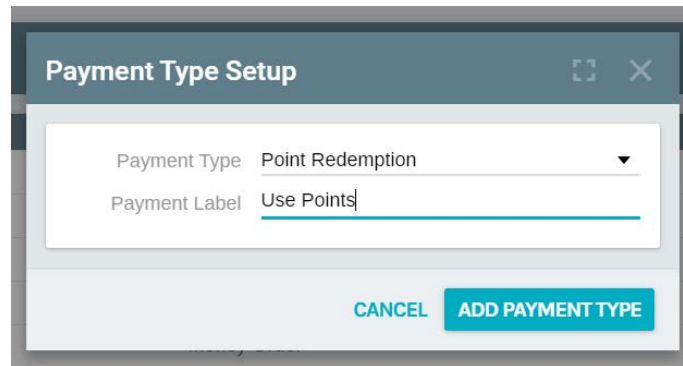
HOW TO SETUP THE PAYMENT METHOD TO BE USED FOR POINTS

Go to Administration>>Settings>>Accounting Settings and click on Manage Payment Types in the middle column:

Payment Types		
Payment Type		Payment Label
1	Credit Card	Credit Card
7	ACH Debit	ACH Debit
2	Check	Check
0	Cash	Cash
12	Money Order	Money Order
6	Use Credit	Use Credit
8	Bank Draft	Bank Draft
9	Wire Transfer	Wire Transfer
14	Used Credit From Account	Other 1
15	Other 2	Other 2
16	Other 3	Other 3
17	Wallet	Wallet
10	Use Points	Point Redemption
11	COD	COD
3	TECT	Credit Voucher

[MANAGE PAYMENT TYPES](#)

From the Payment Types pop-up, click on the **Add Payment Type** button and the **Payment Type Setup** screen will appear:



The screenshot shows the 'Payment Type Setup' dialog box. It has a title bar with 'Payment Type Setup' and window control icons. Inside, there are two fields: 'Payment Type' with a dropdown menu showing 'Point Redemption' and a downward arrow, and 'Payment Label' with a text input field containing 'Use Points'. At the bottom, there are two buttons: 'CANCEL' and 'ADD PAYMENT TYPE'.

You can select the Point Redemption option from the drop down in the Description field and then provide the label you want to use for this payment method.

REDEEM POINTS FOR ORDER PAYMENTS IN THE EXIGO ADMIN

Points can be redeemed through Customer Service orders using the Order Entry screen in the Exigo admin. From the Payment tab of the order, click on Add under Payments and you will get the Add Payment popup. Select the point payment method from the first drop down. If there is more than one point account configured with the same currency code and is enabled to use for product purchases, you will see a second drop down field for Point Account. Choose the one that you want to use:

Add Payment ✖

Payment Method: **Use Points** ▼

Payment Amount: **2.48**

Currency: **Dollars (US)**

Payment Date: **1/31/2018 1:29:13 PM**

Point Account: **Wallet Account US** ▼

Available Balance: **2710.4200**

CANCEL
ADD PAYMENT

You can adjust the payment amount if you do not want to use points to pay for all of the order. The available balance for the point account selected will be displayed.

Once you click on OK and Finish the order, you will see the points deducted from their point account view on the customer page:

Point Account:	Wallet Account US
Point Balance:	182.37

Transaction Date	Points	Ref Type	Ref ID	Reason
8/6/2014	276.00			VendorBillID:18530
8/6/2014	-93.63	Payment	1050503	4561468

REDEEM POINTS FOR ORDER PAYMENTS IN WEB CODE

Use the web service CreatePointTransaction from <http://api.exigo.com> using the transaction type 'Redemption' and it will decrement the point balance. The OrderID number could be passed as part of the Reference field so there is a record of which order the points were used against. Once the points are deducted, you would then use the web service CreatePayment for the order and the payment type would be PointRedemption.

REDEEM POINTS FOR AUTOSHIPS IN THE EXIGO ADMIN

The recurring orders will generate order records in pending status based on the payment type to be used for the autoship. If the payment type is Primary/Secondary Card on file, the order will be saved as CCPending status. If the payment type is Primary/Secondary Wallet on file or Debit Checking account, the order will be saved as ACHPending status. Once you batch charge the pending orders in each status, the process will first look to see if the customer that belongs to the order you are about to charge has a point account balance in the same currency code as the order that is enabled for Allow for Autoships. The points will be used first as the payment of the order up to the subtotal and any remaining balance will be charged to the planned payment method. For example, the customer has a CCPending autoship order for \$187.65 and their point balance is 95.00. The order will have a payment of \$95.00 using the Point Redemption payment method and the difference of \$92.65 will

be charged to their credit card as a second payment. If the credit card charge declines, the order will stay in CCDeclined status and there will be no point payment. The order can be retried or cancelled.

WITHDRAW FROM POINT ACCOUNTS WITH CONVERTED COMMISSION EARNINGS

If you are using the point account to manage a virtual bank or wallet program, you can use the web services found at <http://api.exigo.com>. Here is a typical process flow for how you would manage this in the web code:

Use `GetPointAccount` to display the balance of the account.

Once a withdrawal request is made, then deduct the points from the account using `CreatePointTransaction` with the transaction type 'Adjustment' and use the Reference field to note the withdrawal request.

Then create a vendor bill to represent the amount of the withdrawal that should be paid in the next commission payout. Use `CreateBill` and `IsOtherIncome` should be set to False. The income for the 1099 is tracked on the original Vendor Payment that was created when the earnings were originally converted to points. Any subsequent withdrawals from the point account should not be reported as income. This would also eliminate any potential of point transfers between accounts also counting as income.

Leave the default `billstatustypeid` as Unpaid.

Optionally, you can set the payable type for the customer using `UpdateCustomer` and set the payable type to be the method to use for paying out withdrawal requests.