



Order Calculation Survey

v 1.0

Please review the scenarios outlined below and advise Exigo if any of these apply to your business. We would then request the specific details of your order calculation rules and then review for programming estimates. You can elect to program the rules yourself using the Order Calculation Engine plugin for Visual Studio, or request Exigo to program it after you have received the estimate.

1) Warehouse Change

- a) Need ability to change the warehouse on the order after committed based on the following:
 - i) ship to country
 - ii) ship to state
 - iii) ship method selected
 - iv) specific ship to address
 - v) specific item on the order

2) Ship Method Change

- a) Need ability to change the ship method options available based on the following:
 - i) ship to country
 - ii) ship to state
 - iii) specific item on the order
 - iv) total weight of the order
 - v) total value of the order

3) Shipping Rate Calculation

- a) Need to be able to charge shipping based on the following:
 - i) Static schedule by SOP
 - ii) Static schedule by Weight
 - iii) Get price from Web using FedEx/UPS API
 - iv) Get price from Web using third party shipping rate calculator API
 - v) Static schedule by ship to zip
 - vi) Static schedule by ship to state/region
 - vii) Static schedule by ship to country
 - viii) Zone lookup table provided by client
 - ix) Static schedule with combination of weight, zip, state or country
 - x) Static schedule based on specific items

4) Handling Fee

- a) Need to be able to add a handling fee at the order level based on the following:
 - i) Ship to Country

- ii) Ship to State
- iii) Warehouse ID
- iv) Specific item on order
- v) Ship method selected
- b) Need to be able to add a handling fee at the order detail level based on the following:
 - i) specific item
 - ii) other field setting on the item

5) Tax Rate Calculation

- a) For domestic, need ability to charge tax based on:
 - i) Tax rate tables provided by Exigo for US
 - ii) Tax rates provided through third party API
- b) For International, need to be able to set the flat rate values by:
 - i) Country
 - ii) Region
 - iii) Zone
- c) Need to set taxation rules for each item as taxable, exempt or reduced by
 - i) Country
 - ii) Federal
 - iii) State/Region
 - iv) County
 - v) City
- d) Charge tax on shipping using either the same rate as the ship to address or a different rate hard coded.
- e) Charge tax on the taxable price of the product or some other value type defined by client
- f) Charge tax based on the category of an item (defined using OtherCheck# or Field# on Item)
- g) Need to set tax exemptions by:
 - i) Customer tax exempt flag (individual)
 - ii) Customer Type
 - iii) Customer Status
 - iv) Customer Rank
- h) Need to set flat VAT rates for country and regions
- i) Need tax rate of the order based on the warehouse address and not the ship to address when specific rules in place:
 - i) Will Call ship method uses warehouse address

- ii) Specific Ship To address uses hard coded value.
- j) Need to tax child items in a kit based on individual item rules and then roll up the sum to the order level.

6) Discounts

- a) Need to be able to calculate discount and apply to order as:
 - i) Discount value that is deducted from the order and stored in the discount field.
 - ii) Add item code with negative quantity to indicate the discounted amount.
- b) Need ability to discount the order with:
 - i) Reduction in price paid for individual item
 - ii) Reduction in price paid for overall order
 - iii) Reduction in BV or CV of order
 - iv) Reduction in taxable price
 - v) Reduction in value used for shipping rate calculation
- c) Need to discount an order based on the following:
 - i) Value of specific volume bucket at time of order based on previous period (would be nice to capture this on the order somewhere)
 - ii) Subtotal exceeds thresholds per static schedule
 - iii) Volume of order falls within thresholds of static schedule
 - iv) Value of user defined field on the item falls within a static schedule (for example, total number of bottles purchased in a month)
 - v) Cumulative volume of orders placed in current month exceeds thresholds
 - vi) Discount value is determined by
 - (1) static values tied to a threshold schedule
 - (2) Price of item code matched with discount rules
 - (3) Percentage discount of the item price
 - (4) Percentage discount of the order subtotal or total

7) Add items to order

- a) Need to add items to an order based on the following:
 - i) Specific Customer Type
 - ii) Specific Warehouse
 - iii) Specific items already on the order
 - iv) First Order
 - v) First Order of the Month
 - vi) Item to offset shipping costs
 - vii) Item needed for discount offset (see 6.a.ii above)

8) Order Status Overrides*

- a) Override the status of an order based on the following:
 - i) Payment method used
 - ii) Warehouse Used
 - iii) Specific Item on order
 - iv) Subtotal of order exceeds static value
 - v) Virtual item on order forces shipped status
 - vi) Subtotal of order exceeds customer user defined field threshold

9) Restrictions

- a) Restrict the purchase of product or adding items to an order based on the following:
 - i) Inventory levels
 - ii) Order source ty
 - iii) Order total that exceeds max value
 - iv) Max quantity on order
 - v) Availability of item in that region/state/country
 - vi) Cumulative total for month exceeds max value
 - vii) Order total exceeds value in customer user defined field.

10) Dynamic Price Types

- a) Change the price type of an order based on the following rules:
 - i) Rank level
 - ii) Order Source ty
 - iii) User defined field of customer
 - iv) User defined field of item
 - v) This autoorder flag is set to true (upgrade from retail to preferred if say yes to autoship during shopping).

11) Create AutoOrder from Order*

- a) Need to create an autoorder record with a new order trigger based on the following:
 - i) Item rule set to generate same item on recurring order
 - ii) Item rule in user defined field set to generate different item on recurring order

12) Parent/Child Orders*

- a) Split the order after calculation into two orders based on the following:

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- i) Warehouse used
 - ii) Specific items on the order
 - iii) Ship method used

*These custom processes can be programmed but would also require some additional programming outside the calculation engine. Depending upon the nature of your custom rule, you may not be able to program these yourself.