exigo

Adding a New Country

v 1.1

Contents

Introduction

Exigo has the functionality to support multiple countries and/or languages. When adding a country or language, it is important to consider the impact on websites, shopping or signup, and configuration settings within Exigo. This document provides information on the areas of Exigo you will need to update to support your International Expansion.

Before getting started, review the list of questions below to help you determine your requirements, and which updates you will need to make:

Common Questions

1) **Do I need to add another 'Price Type'?**
   a) You can keep the retail vs. wholesale price types if you plan to use different currencies. You can configure pricing by currency type for the current price types that you have.
   b) In most cases, it would **not** be necessary to create a new price type unless you are offering a discounted program for the new country that is not available in current countries.

2) **Is there going to be one 'Invoice' for all languages or will I be offering a different invoice in this new language?**
   a) You may need to create a new invoice template and recurring order template that is formatted for the new country using the local language. Using our template editor tool, you can create multi-language invoice templates.
   b) Any government invoices that are regulated and require pre-assigned numbers or regulated formatting may require customizations. Please notify Exigo ASAP should this apply to your new country. Keep in mind that custom invoices may be billable depending upon the magnitude of the customization.

3) **How will the shopping cart be different for the new country?**
   a) It is recommended that you create a new warehouse location for the new country.
   b) You can then set the following items that would be different from other shopping carts already in place:
      i) Currency for Order Payments
      ii) Ship Methods specific to the country
      iii) Merchant Accounts
      iv) Language (The language ID for the warehouse is set by Exigo and you will need to notify us if you plan to store product information in multiple languages for the same SKU/item code).
      v) Invoice Template

4) **Will customers be paid the same or will there be a new check format?**
   a) Please remember to notify Exigo as soon as possible if there are any planned variances in your commission earning processing. If you have country specific rules for your rank advancement or bonus qualification, they can be programmed into your commission engine. b) Here is a checklist of what to consider:
      i) Check Formatting
      ii) Minimum check threshold amounts
      iii) Any government tax withholding
      iv) Will other country earners be paid in different cycles (i.e, no weekly pay unless USD vs monthly only for non USD earnings)

5) **What are the taxation rules for the new country/language?**

   a) You can set a flat VAT amount for all regions in the country for all items in the Item Maintenance taxation tab?

   b) If you need to charge tax on shipping, then you will need to notify Exigo so that the setting can be configured for you in the database.

6) **Are there any changes that need to be made in the Order Calculation Engine?**

   a) Any new shipping calculations?

   b) Any new taxation rules?

   c) Any changes to discounts or promotions?

   d) Any changes to how your AutoOrders are setup?

7) **Do you need to distinguish these new language customers by adding a new customer type?**

   a) Remember that a customer type controls the following:

      i) Which website or back office that is used.

      ii) Which price type is used when they purchase products?

      iii) Which email auto responder is sent for order confirmations or welcome letters?

      iv) Does the commissions team need to treat this customer type differently in the qualification rules?

   b) If you need to segregate the new country customers for any of these reasons, then you may want to introduce new customer types.

8) **Can I have a back office in the new language?**

   a) Yes, you can. We recommend making a copy of your current back office and then use resource files to manage the translations. Exigo does not provide any translation services.

   b) Please keep in mind that you will need to change some settings of the shopping you are using in the back office:

      i) Make sure the Order History and Shopping Carts are configured to use the new Invoice template you have created in the new language, if applicable.

      ii) Remember to configure your shopping cart to use the new ship methods and countries you have added.

9) **How will my online signup application change?**

   a) It may not be applicable to collect the tax ID.

   b) If you have email address as a required field, you may want to make this optional depending upon the country you are adding (For example, members in Mexico do not always have email).

   c) You may want to change the state/region and country drop downs.

   d) Remember to change the item codes if you have new ones for the country.

   e) Remember to set the currency code and any other settings that are specific to the new warehouse you are using.

10) **What about auto-responders?**

   a) You will want to revisit your auto responders you have in place to see if it is necessary to make new ones for the new country or language.

   b) Make sure you configure the settings with your new customer type, currency codes, or warehouse settings you may have added.

11) Will you need a new payment gateway for Credit Card or ACH that will need to be programmed?

    a)   Will you charge the local currency for product purchases?

    b)   Is the new gateway PCI compliant?

    c)   Will any of your payment processes for Web Orders, Customer Service orders or Autoship orders change because of the new gateway?

Adding a Language for Products

You will need to notify Exigo if you wish to support a non-English language for a warehouse and want to store multi-language data for the same item code.

There are four different text areas where you can add information about each product to be displayed on the website. You can enter a Short Descpriton1, Short Description2, Long Descrption1 and Long Descpriton2. You can store this information in multiple languages if you plan to use the same item code/SKU across multiple countries.

Each warehouse by default will pull the default Web information for each product dynamically from the database. A language can be added to a warehouse that will instruct the system to only pull product information in that language. Once you have associated a language for a warehouse, then only that data will be pulled. You will not be able to support more than one language once this feature is turned on.

Once the feature is turned on, you will now see in the Web section of the Item Details screen a link for each language. This means that the warehouse will pull the translation version of the item data based on the language ID.

Website

You may need to create new folders on the ftp site or get with your vendor to review all changes needed for the new country. Exigo can provide support as needed.

Configuration Settings

From Administration>> Settings, stay on the Company Settings screen and you can change the following items:

- **Adding a New Customer Type**
  - Click on 'Modify Customer Settings' in the center column
  - Click 'New' and use the new popup window to configure the settings for this new customer type.
  - You will need to select the price type to be used for the new customer type. o You will need to select the default back office website for this customer type.

From Administration >> Settings, select the Accounting Settings from the upper right tool bar and you can change the following items:

- **Creating a New Invoice** – Click on 'Add Order Template' in the left column in the section Invoice & Statement Setup
- **Creating a New Recurring Order Template** – Click on 'Add Recurring Statement Template' in the left column in the section Recurring Template Setup
- **Adding Another Country** – Click on 'Modify Country Settings' in the center column
- **Adding Additional Currency -** Click on 'Modify Currency Settings' in the center column, then click 'Add' under the word 'currency' on the right hand side
  - If you do not see the currency that you will need, please notify Exigo so that we may enable it for you.
- **Creating a New Warehouses -** Click on 'Modify Warehouse Settings' in the top right column. Click 'add' on the left hand side
  - Remember to enable to currency codes you plan to use
- **Setup New Ship Methods -** Click on 'Modify Carrier Settings' in the right column and click 'Add' to setup new ship methods
  - Do not forget to enable the Display on Web feature if you plan to use the ship method for autoships.
  - Do not forget to setup the rate range in the currency you will be using.
- **Merchant Account -** Click on 'Modify Merchant Settings' in the right column to add the merchant account for your new country warehouse
  - Remember to set the correct currency.
- **Creating a New Bank Account -** If you plan to use a different bank for printing commission checks for the new country, you will want to add a new bank. Click on 'Add New Bank Account" in the left column.
- **Creating a New Commission Check Template -** You can setup a new style format for each bank account you have defined. A link will appear in the Check Templates section for each bank. Click on the account to configure the style you plan to use with the bank information.

Product Information

- **Adding or Updating Products**
    - o   In the left navigation, **c**lick on Accounting >> Items
    - o   Click on 'Add' from the top navigation or find the product you want to update and double click
    - o   Update or Add the appropriate information and click on 'ok' to save
- **Adjusting Product Prices with New Currency** o
    - o   Click on Accounting >> Items
    - o   Search for the product and double click on it to modify the price
    - o   Click on the 'price tab'
    - o   Change the currency code in the drop down.
    - o   Edit the corresponding text boxes to adjust the pricing or price types
    - o   Click 'ok' to save the changes

Multi-Currency Considerations for Commissions

If a company does business in more than one country, they will probably be taking orders and paying out their distributors in multiple currencies. Here is how the system handles this:

- At each run, confirmation of currency conversion rate is requested. This is all done against US Dollars in the form of $1 USD = x of foreign currency.
- Commission source is stored in the source currency that it came from. However there are "Exchanged" fields corresponding to each volume field where the exchanged to USD amount is stored.
- Commissions are then calculated and written to the commission detail to two fields storing the original source amount and the exchanged amount to the currency that the distributor is to be paid in.
- These then cleanly aggregates up to the total commission record for the distributor.
- The distributor, on his statement can still see the source currency of the order as well as his exchanged amount and earning amount.
- The first time a customer transacts with the company, the currency of the transaction will be stored in their Customer record as their 'home currency.' This is found in the Currency field. The commission program will pay out in the 'home currency.'

Volume vs. Currency for Commissions, Rank Advancement and Volume Push

As you introduce new items with volumes and currencies for other countries, please keep the following in mind, Volumes are CURRENCY NEUTRAL!
The volume amounts used for qualification should always be currency neutral.

It should be based on the level of effort. For example, it is easier to sell an item in the US so the qualification volume is your base (40 for example) and it is harder to sell the item in Mexico, so the base volume could be a little more. This volume is generally a point system that is adjusted for each country based on the scale of economy. Then, you have the same qualification rules for everyone, regardless of country.

If you use volume amounts to determine what the payout should be (5% of BV for example), then you still need to keep the volume currency neutral. Once the commission earning is determined (40 x 5% = $2), then the $2 earning would be converted to the home currency based on the exchange rate.

The exchange rate that is entered at the time of commissions is used to convert any dollar amounts from orders that are used for qualification or pools or retail rebates, it does not convert any volume values. The dollar amounts are converted to US dollars for the purpose of calculation so there is a base currency to work with.

Once the final commission earning is determined, then the exchange rate is used again to convert the US dollar amounts to the local currency that is set on the customer's record as their home currency.

You may need to add some instructions to the back office to explain to your members how the volumes are collecting as 'points' instead of 'dollars.'