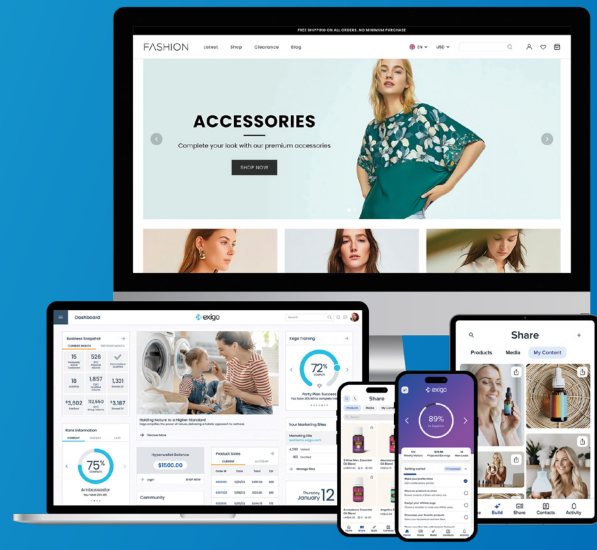
exigo

EXIGO CORE FEATURE LIST

Run Your Business Confidently with Commissions, Back Office, and Corporate Admin.



Exigo Core

CORPORATE ADMIN

Home:

This section manages information for logged-in users. The "Today" dashboard shows at-a-glance company information, including other online users, actions to complete, and the latest news. Client users can manage their passwords, notes, time sheets, contacts, calendars, actions, and documents.

Customer Management:

Exigo Admin allows client users to create and manage all customer aspects, including different address types, payment information, commissions, notes, statuses, and other details. Customer Management is detailed, versatile, and expansive, allowing clients to capture broad amounts of data regardless of operation location or custom customer needs. Searching for an end customer provides all related data in the Exigo Platform through customer-specific navigation portals. Within sub-navigation, clients can see all data related to the end customer, including order history, payment management, commission history, messaging, and key performance indicators unique to that customer.

- **Upline/Downline Management:** Upline/downline information can also be displayed for various trees applicable to the client. User-defined fields can also be used to capture non-standard data that is relevant to display.

Order Management:

These screens offer a streamlined way to create and manage end customer sales. Orders can be created by selecting items, shipping types, and payment. Orders are customizable and flexible to manage returns, replacements, and refunds. Order modifications use the Order Calculation SDK module to calculate complex and customizable needs like taxation, promotions, and international requirements in real time.

- **Overrides:** Allows specific values to be overridden that wouldn't be available to the end-user. Examples include tax/shipping overrides, price types (wholesale vs. retail), and warehouse. The system also provides admin users with the ability to select an order status/sub-status (ex. creating an order and manually setting to “accepted” or “shipped.”)

Payment Management:
This feature gives clients the ability to manage end customer payment transactions easily and with customization. Payment Management uses the Money-In SDK module to allow unique payment processing solutions for international markets, gateway and merchant selections, and specific data retention needs.

Item Management:
This broad subsystem allows clients to manage products into item codes (SKU), tax information, regional availability, warehouse availability, pricing, and customizable information. Item Management provides clients with the ability to manage complex products that may be part of a kit or items that need to be sold or taxed in specific regions or only specific customer types.

Messaging/Broadcasts:
Broadcasts allow clients to communicate with their end customers easily. Clients can create a message and configure send properties to choose the communication method, including email, SMS, or push notifications to the Exigo Platform mobile application. Broadcasts are filterable and can target a subset of end customers based on information obtained in the Customer Management subsystem.

Auto Responder Messaging:
This automated messaging feature sends messages to customers based on events triggered by changes in customer data (new customer, new orders, etc.) or by recurring data filtering that captures a significant event (expired credit card, etc.). Auto Responder Messaging templates can be customized with merged fields to personalize communication with customer information. Filtering can be refined to allow specific messages to reach the exact audience in complex situations.

- **Base Triggers:** New Customer, New Order, New Distributor Enrollment, and New Rank Advancement. Further custom triggers can be programmed.

Online Documents:
This management user interface (UI) allows clients to upload and organize company documents to share among team members. The Exigo Platform stores uploaded documents in client databases and allows different file types to be uploaded and managed.

- Upload and attach documents to individual user accounts, like acceptance of user agreements or Ts & Cs, etc.

Accounting Overview:
This module is used to pay commissions. It provides an overview of all money in and out of the company. It also offers a high-level view of various warehouse invoices, bills to pay, and miscellaneous tooling to help batch process orders or reprint lost invoices.

- **Commission Payments:** When ready to pay vendor bills (commission payables), the system uses a secure Multi-Factor Authentication flow to prevent mistakes. The vendor bills will be marked as Paid in the system and sent to the preferred financial institution for payout.

Invoices:
This provides an overview of all orders created across all regions and warehouses for a client. Clients can see data and manage order invoices in bulk. The Invoices function can create invoice batches to be fulfilled or managed in groups.

Vendor Management:

This is a straightforward way for clients to track, manage, and monitor third-party vendors. Vendor Management removes the complexity of tracking amounts paid to vendors, shared documents, and miscellaneous information that simplifies vendor relationship management. ***Note: Field Reps, Distributors, etc., are listed as "Vendors" in this case, so anyone who earned a commission will be listed as a "vendor."***

Commissions:

This interface rests on top of complex data that comprises a client's member reward. The commissions interface maintains a historical list of commission periods and runs used to pay members, and the ability to run periodic commission calculations to keep up with current period data. From this interface, clients can review core data that makes commission calculations, including period types, customer types, volumes, qualification overrides, bonuses, and hierarchical trees. Clients can also dig into granular data points to see member performance and generate specific reports on commission data.

Commission Development:

This provides a view into the Commission SDK used to calculate commission data. Historical revisions to the SDK module are maintained and can be compared against prior revisions and updates. From this view, clients can view changes, test new revisions, report issues, run reports, and deploy module revisions.

Order Development:

This tooling gives clients the ability to manage the Order Calculation SDK module. From Order Development, clients can compare changes between revisions, review change logs, and deploy the live plan.

Reports:

The Reports section contains a variety of standardized reports covering all aspects of client data on the Exigo Platform. Reports cover many areas, including sales, members, customers, orders, change management, auto responder logs, and products. Advanced report builder options allow clients to create reports targeting data using dynamic tools within the UI or with direct database access through SQL queries.

User Management:

This is a central location that allows clients to manage access within the Exigo Platform. Accounts created within User Management have granular permissions that can be applied to grant access to specific areas of the Admin Portal, the Exigo Web API, Exigo Portal, etc. Accounts created in User Management identify a single login used and tracked throughout the Exigo Platform to access client-related content.

Content:

This is a central location to manage client content. Content Management gives clients the ability to create new sets of resources, make changes to existing content, create new languages for translations or market targeting, create new environments for testing or new website types, and release changes directly into their marketing or ecommerce user interfaces. Content Management removes the need for developers to make content changes for clients and allows clients to manage their content dynamically.

Settings:

This is a combination of company and accounting-related settings that configure a client with granular controls. Settings can configure warehouses, accepted currencies, regional markets, merchant and gateway credentials, invoice templates, custom data fields, IP restrictions, and more. Settings is a central location to manage everything configurable with a client Exigo Platform instance.

Sync Database Users:

This feature creates and manages Sync destination database users in a secure way to limit access to Sync destinations.

COMMISSIONS

Commission Management

- **Statistics/KPIs:** View Key Performance Indicators and other compensation plan data points
- **Comp Plan Types:** Automate the commissions calculation process with advanced customization based on the intricacies of your organization's compensation plan to reduce errors and keep consistency
  - **Unilevel:** Unilevel compensation plan compatibility
  - **Binary:** Binary compensation plan compatibility
  - **Matrix**: Matrix compensation plan compatibility
- **Profiling:** Get a snapshot of what the payout will be for the entire environment
- **Overrides:** Override a default bonus using existing compensation plan rules to alter the type of bonus to be paid out to individual distributors
- **Commit Commissions:** Finalize profiles to prepare for commission payouts
- **Commission Adjustments:** Customize any adjustment to an individual distributor's compensation plan
- **Commission Deferments (Pay, Hold, Forfeit):** Review which distributors are getting paid—hold or forfeit payments to delinquent accounts or remove those holds
- **Payment Approval:** View the quantity and destination of payouts and approve money transfers
- **Commission Auditing:** Audit profiles before committing them. View the destination of payments and segment by rank and review the logical structure of the compensation plan (including order history)
- **Tree Movement:** Manually edit an individual's location within the branches of your tree or remove nodes from it
- **Edit and Model Commission Plans:** Reconfigure your compensation plan on the fly—no need to roll code; make your changes live with a click. Model comp plan changes against real data to know the payout before ever making a change in production

Item Management

- **SKU Creation/Management:** Create unlimited product SKUs
- **Product Image:** Add images to replicate site product descriptions
- **Descriptions:** Add descriptive language to replicate site product pages
- **Specs:** Add specifications to replicate site product pages
- **Price Adjustments:** Change prices on replicate site product pages
- **Bonus**: Bypass the traditional compensation plan by offering bonuses on specific products like new releases.
- **Categories:** Aggregate relevant products into groups
- **Product Promotions:** Discount individual products

- **Multiple SKU Extensions:** Customize SKUs to include multiple colors, patterns, styles, or flavors of the same product
- **Product Kitting:** Group SKUs together to create kits that include multiple products and generate a unique kit ID
- **Dynamic Product Kitting at Purchase:** Allow kit creation with customer customization of flavors, sizes, etc.
- **Pricing Groups:** Segment product pricing for different customers and groups as well as pricing by market, region, account type, order type, and store

Customer Relationship Management (CRM)

- **User Management:** Edit and view distributor and customer contact information
- **User Audit Trail:** View changes to distributor and customer contact information
- **Impersonate Distributor:** See a distributor's back office from their perspective
- **Tree Movements:** Manually edit an individual's location within the branches of your tree or remove nodes from it
- **Autoship MGR:** View, edit, or delete and change the contents, timing, or payment of autoships
- **Corporate Reporting:** View company-wide reports on sales and other KPIs
- **Promotions:** Offer a specific user a coupon or ongoing discount
- **Field KPIs/Sales Stats:** View reports and statistics on individual distributors
- **Dist. Setting - Ship, Bill, Payout:** View and edit your distributors' shipping and billing addresses and manage their commissions payout methods
- **Order:** Place orders from within the corporate system
- **Returns (RMA):** Initiate and record the returns process
- **Commissions History:** View a log of commissions you've paid out in the past
- **Enrollment:** Manually enroll new distributors in your system
- **Personally Sponsored:** View the relationship of an individual to their enroller or sponsor

Financial

- **Sales Dashboard:** View company-wide sales and other statistics from the last month
- **Reports:** View a series of financial reports generated by the system
- **Invoices:** Generate and display invoices for payables
- **Payments Status Log:** View the history of payment status in real-time
- **Coupons:** Manage the creation and validity of coupon codes
- **Vendor Bills (Commissions):**
  - **Payable Status Management:** Edit the status of payables to distributors
  - **Commission Payment Approval:** Finalize the payout of approved distributor payables
  - **ACH (US) Money Out:** Set up direct deposits for distributor accounts and connect with 3rd-party providers
- **Payment Methods by Market:** Segment payment methods based on the market of a distributor
- **Currency:** Set defaults for currency exchange rate price adjustments

BACK OFFICE

Homepage

- **Point Balance Widget:** Shows the available commissions in the system's point account, if being used by the client.
- **Marketing Widget:** Static images in a banner carousel with links to internal or external URLs.
- **Associate Profile Widget:** Static information from Replicated Database available fields.

- **Business Snapshot:** Defaults to 9 volume buckets show in 9 tiles in widget.
  - Definition Modal pop-up is client controllable from resource sets in the Back Office Configuration (BOC).
  - Tiles available are configurable through BOC.
  - Configurable to have as few or as many tiles as desired.
- **Product Sales Grid:** List of past Orders and AutoOrders in the database.
  - The data available in this grid is customizable, like the other grids.
- **Calendar Summary Widget:** Summary Calendar Page/Report.
- **Training Progress Summary Widget:** Summary of Training Progress Page/Report.
  - Training Courses/Steps/Tasks are client configurable through the screens in Back Office BOC.
- **Rank Information Widget:** Displays progress percentage based on compensation plan rules.
  - Details on rank qualifications are available via the link at the bottom of the widget.
- **Customer Wall Widget:** By default, the list shows all available Custom Events in the system.
  - Can be customized to filter the events listed or broken out to show multiple widgets with multiple filters by widget.
- **Social Networking Widget:** Links to the Company's social networking sites.
  - Client configurable through the BOC.
- **Replicated Marketing Site Widget:** Displays link to the Distributor's replicated marketing site. Copy available by clicking the share link.
- **Messaging:** Allows review of historical, internal Back Office messages.
  - Allows creation of new one-to-one messages.
  - All messaging is contained within the back office.
- **Distributor Search:** Allows users to search for individuals in their downline.
- **Profile Shortcut:** Includes Profile Information, Settings Access, Sign Out, and Localization (Language choice)
- **Current Projected Commission Widget:** Uses commission Volume Push to project the commissions that will be earned for the current open period.
  - Can customize to add different projection for different period types in a compensation plan.
- **Last Accepted Commission Widget:** Pulls the summary of all commissions earned for the last accepted run.
  - Can customize to add display for all period types in a compensation plan.

Business

- **Team Dashboard:** View home page information for a Distributor in the logged in user's downline.
  - Provides most of the widgets found on the home page.
  - Availability and visibility of the widgets are controlled separately from the home page in the BOC.
- **Visual Tree:** Visual representation of each tree used within a compensation plan. The Default view shows cards with avatar image and placement. It can also color-code nodes using Heatmap and include status, rank, and AutoOrder status.
  - Allows for pan and zoom throughout the user's organization.
  - Click to see more information about the distributor or focus them to the top of the tree.
  - Holding tank or delayed placement is supported but must be customized to the client's specifications.
  - Views may be customized.
- **Report Center:** Grid based reporting that allows:
  - Sorting
  - Filtering
  - Searching the report results

- Export to CSV or Excel and copying of the data
- Messaging to customers/distributors listed in the reports
- **Default Reports in base spin-up:**
  - Personally Enrolled Team
  - My Customers
  - Upcoming Rank Advancements
  - Downline's Orders
  - Downline's Auto-Orders
  - New Distributors List
  - Order History
  - Pay History
  - Volume History
  - Downline Activity
  - Downline Viewer

- **Commissions Report:** Detailed view of commissions earnings by period.
  - Lists all orders by bonus with order amount and resulting commissions where possible.

Tools

- **Documents & Media:** Repository for uploaded documents and media.
- **Calendar:** Calendar system used to track events uploaded by Distributors or the Corporate Team.
- **Training:** Training system, controlled by the BOC/client.
  - Allows for Course broken into Step broken into Tasks.
  - Management of the Training Courses is done through the BOC and features an HTML builder to create the training courses.
  - The progress of the courses is recorded in the database.

Orders

- **Place an Order:** Single order placement and auto order setup pages.
  - Grid based product listings with categorization and filtering.
  - Product detail pages support full HTML for product details and multiple images.
- **Manage Auto Orders:** Allows for management of active auto orders setup on an account.
  - Changing products
  - Updating order frequency
  - Modifying payment methods
- **Order History:** Listing of past orders for review. Includes shipping and billing information as well as products ordered.

Settings

- **Distributors personal information management including:**
  - Name
  - Company Name
  - Addresses
  - Contact information
  - Saved Payment Information
  - And more

Support

- **Simple display of available support options:**
  - Company Support
  - Enrollment Contact Information
  - Sponsor Contact Information

BACK OFFICE CONFIGURATION (BOC)

- The Exigo Admin Back Office Configuration (BOC) screens allow the client to customize and manage many components of the Distributor Back Office. This configuration tool is available through Exigo Admin only, and access is controlled through user-based access control managed by the client.
- While the configuration tool does not let you manage the base code itself, there are many tools that allow you to effectively manage most of the reports, training, navigation, and other areas easily. See the default configuration features below.

Asset Management

Exigo allows you to control many parts of the Back Office in a simple interface. The interface allows you to change the visibility of widgets, reports, menu items, documents/media, and training. These controls allow you to hide/show based on the following:

- On/Off
- Date/Time
- Languages
- Customer Types
- Customer Statuses
- Customer Ranks
- Custom:
  - Any table or field in the client's replicated database (RepDB) can be used to control the Asset System.
  - Write a simple lambda-based query to indicate if the item should be visible or not.

Configurable Sections/Pages

Many pages, widgets, and sections can be managed through the BOC. These pages include:

- Homepage
- Support
- Team Dashboard
- Document and Resources
- Training Courses
- Navigation
- Data Grids
- And more

Data Grids Management

- The Data Grids are configurable through the BOC. This allows a client to create, change, limit visibility, or remove any grid-based report from their Back Office.
- The steps to create a grid-based report are simple:
  - Click Add Report.
  - Choose your options.

- Define the columns with sorting, filtering, and grouping.
- Drop in the SQL query written against your RepDB.
- Save the report.

Releases

- The BOC has a release management tool that allows users to easily create Environments and Releases. This allows your marketing and development teams to create a new release, make changes, and deploy it to a testing environment to allow the business to review and test prior to deployment.
- Once tested, deployment is as easy as setting the Production environment to the tested release.

Languages/Localization

- Being able to support different international locations and languages is critical to the success of many businesses. Built into the BOC are language files that control all the resourced text, images, widgets, and other assets within your instance.
- If a new language is needed, simply copy the default, and provide an export of the language files to your translator. Once complete, upload that document to the BOC and the pages will then translate based on the values uploaded.

APIs and SDKs

Exigo Web API:

Exigo's Web API is built on Representational State Transfer (REST) protocols and is available to all Exigo Platform clients. The Web API grants access to methods using the User Management system. The Web API can be IP whitelist restricted to secure data access to only approved IP addresses. Access to client data via the API is managed by the client. API usage is metered, and the volume of usage is at the client's discretion. The Exigo Web API can be used with Exigo Sync to limit reliance on the Web API and instead use a Sync destination to pull data that does not need to create or retrieve data from the production environment.

- ***Note: Some Exigo clients use Simple Object Access Protocol (SOAP)***

Exigo's Web API can be used to manage all aspects of the Exigo Platform, including:

- **Customers:** Used to create, manage, and retrieve customer data, including extended information like billing details or detailed extended properties. This section also contains tools for tree placement, billing, social media integration, and customer site management.
- **Orders/Payments:** Used to manage all aspects of order entry from the Exigo Web API. The Exigo Web API can create, update, cancel, or recalculate orders from external applications. Payments can be sent to the Exigo Web API and can use the Money-In SDK with a token provider to create a customizable environment for a client's end ecommerce website or application.
- **Auto Order (Recurring Orders):** Auto Order can create, update, and retrieve Auto Order templates for clients to allow the setup of scheduled/recurring order subscriptions for end customers.
- **Items:** Manages all aspects of Exigo Items, including content, pricing, availability, and categories used in back offices.
- **Tree Movement:** Tree Movement can place and update members of an end customer's hierarchical tree.
- **Payout:** Payout can manage, create, and fund vendor bills and cards.
- **Reporting:** Reporting allows clients to retrieve built-in or customized reports for third-party scenarios, such as internal

websites or applications. The reporting section can also retrieve real-time commission reports or update rank qualification overrides.
- **Communications:** Communications allows end customers to opt in/out from receiving marketing or messages from the Exigo Platform customer and send company news and/or messages to end customers over email or SMS to communicate essential information.
- **Customer Leads:** Customer leads create and manage customer leads.
- **Files/Folders**: Files/folders is an online document management portal. Exigo Platform customers can create, update, and manage files and folders.
- **Web Content:** Web Content provides language translations, content, and resource-set management operations.
- **Extended DB:** Extended DB allows clients to retrieve, update, and manage Exigo Sync extended DB entity information.
- **Other:** A variety of resources are available to assist in managing the Exigo Platform environment, including sending single emails and managing Exigo Web API or Admin IP whitelists. This section includes tools to help manage Exigo Platform environments.

Software Development Kits (SDKs)

The Exigo Platform allows clients to create and use custom business rules and calculations using one or more SDKs provided by the Exigo Platform. SDKs are standardized under the Microsoft .NET framework and provide a complete toolkit for clients to carry out specific tasks within the Exigo Platform. APIs are included in each SDK and provide a common surface area to bridge between the core Exigo Platform and custom implementation code.

- **Commission Engine SDK:** Commission calculations are a vital component in the payout subsystem of the Exigo Platform. These calculations figure out how members of a client's organization are rewarded for their sales efforts. The Commission Engine SDK offers a way for highly customized rulesets and calculations to be maintained. It is made up of the following components:
  - **Commission Engine Host:** A dedicated server process that maintains a proprietary in-memory database tuned for speed. Exigo handles ensuring the host process is available and responsive.
  - **Commission Engine API:** Contains the common interface between the host and custom implementation code. This API contains methods to traverse trees, iterate through sales transactions, and expose qualification decision grids. The API also exposes storage methods for implementation code calls to persist calculation results. Exigo handles the maintenance and design of the API.
  - **Commission Implementation Code:** Clients use a Visual Studio plugin to create and maintain commission implementation code, which holds all the calculation logic for payout amounts. Clients handle granting security rights for users to make changes and for changes deployed into the production environment. The Commission Engine Host pulls in the version of commission implementation logic authorized by the client.

- **Order Calculation Engine SDK:** The Order Calculation Engine SDK handles taxation, shipping, discounting, and pricing of an order, and gives the client a method to control the business rules contributing to the order calculation. It is made up of the following components:
  - **Order Calculations Host:** A dedicated server process that hosts the implementation code and provides access to the source data via the Order Calculation API. Exigo handles ensuring the host process is available and responsive.
  - **Order Calculations API:** Contains the common interface between the host and custom implementation code. This API exposes the current order calculation and access to related data, including pricing and client records. Exigo handles the maintenance and design of the API.

- **Order Calculation Implementation Code:** Clients use a Visual Studio plugin to maintain implementation code, which handles all variables that make up an order. The implementation code may call out to third-party providers such as tax or shipping service providers. The client handles the security, access, and version release decisions.

- **Money-In Engine SDK:** The Money-In Engine SDK is called by the Exigo Platform when a credit card, ACH, or Wallet collection transaction occurs. For PCI compliance, the Exigo Platform does not accept credit card data; tokenization is performed by a PCI-compliant third-party. Tokens are passed to the Exigo Platform and to the implementation code, which relays tokens along with the amount and billing information to a trusted third-party gateway. The Money-In Engine is made up of the following:
  - **Money-In Host:** A dedicated server process that hosts the implementation code and provides access to the core transaction data via the Money-In API. Exigo handles ensuring the host process remains online and responsive.
  - **Money-In API:** Contains the common interface between the host and implementation code. This API exposes the current collection transaction request, which may be a credit card token authorization, refund request, ACH request, or an alternative payment method like Wallet requests. Exigo handles the maintenance and design of the API.
  - **Money-In Implementation Code:** Responsible for taking the collection request and calling the trusted third-party merchant gateway. The implementation code then parses the response from the third-party gateway and translates this into a success or failure reply to the Money-In API. The client handles releasing the implementation code into production through the Exigo Platform Admin Portal.