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# Overview

The purpose of this document is to provide information about the features in our base backoffice and gather requirements for these features in your company’s backoffice.

The URL for the sample site this document is based on is <http://exigobackoffice.azurewebsites.net>.

Login credentials:

Username: www

Password: testpsswd

Please examine each piece discussed in this document while comparing it to the sample site. If you determine that you do not need a specific feature, please do not remove it from the document. Note this in red text to the right of the Feature’s title as a visible opt out.

Example: Feature (Remove)

Each feature will have 3 sections. The Summary section will provide information on what the feature does. The Functionality section will give specifications on how the feature is set up in our base code. The Client Specifications section is the place where you will provide input on anything that needs to be changed about a feature.

# Login

## Gate Keeper

### Summary

* The gate keeper feature is not shown in our base code and is not something that every company utilizes
* The concept of the gate keeper is to restrict access to the backoffice until certain criteria are met. Here are some example of what this can be used for:
  + Update information - the customer is forced to update their information in Exigo’s system. This is useful in enforcing new data restrictions like password strength or just to ensure the user’s information is current
  + Terms and Conditions – the latest date that the user has accepted the terms and conditions can be stored and compared to a date specified by your company. This allows us to force the user to accept the new terms

### Functionality

* No special functionality

### Client Specifications

* No specification

## Login

### Summary

* This is the page where the user logs in

### Functionality

* No special functionality

### Client Specifications

* No specification

## Silent Logins

### Summary

* When a user attempts to log in with a customer type that is intended to shop in the replicated site, they will be redirected and silently logged into the replicated site

### Functionality

* Customer types are company specific, so please provide us a list of customer types that should be redirected to the replicated site

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Dashboard

## Your Current Earnings

### Summary

* This card shows the customer’s Real Time Commissions, if they have any to show, for any unaccepted period
* It also shows the user’s current rank

### Functionality

* The rank shown is the Paid Rank for the oldest unaccepted period

### Client Specifications

* No specification

## Your Promotion Status

### Summary

* This card is an abbreviated version of the Ranks page

### Functionality

* The Payable As rank for the current period(using period type weekly) is used to determine the user’s current rank. This is then used to pull the user’s percentage complete of their next available rank

### Client Specifications

* No specification

## Your Metrics

### Summary

* This card shows specified volume bucket information for the current period

### Functionality

* Currently uses period type of Weekly

### Client Specifications

* No specification

## Your Recent Orders

### Summary

* This card shows the user’s last orders and their statuses

### Functionality

* Currently shows up to 4 orders

### Client Specifications

* No specification

## Your Newest Distributors

### Summary

* This card shows the newest customers in the user’s downline

### Functionality

* Currently shows up to 12 customers
* Pulls from the Unilevel Tree

### Client Specifications

* No specification

## Your Team’s Recent Activity

### Summary

* This card shows the user’s most recent Customer Wall activity

### Functionality

* Currently shows 50 records
* The items shown here are triggered through events which will need to be specified with the commissions team

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Commissions

## Commissions

### Summary

* This page’s purpose is to show the user their current commissions as well as their historical commissions. There is also a report on the page that breaks down the user’s bonuses
* The report being grouped by bonus allows the user to see some information on the customer’s that comprise that bonus

### Functionality

* The Current Commissions portion, shows all of the unaccepted real time commission’s details. The Bonus report is grouped by period and then by bonus
* The Historical Commissions portion, shows only the specified period’s commission details. The bonus report is only grouped by bonus
* Sample volumes are shown above the report. Please specify exactly what information about the commission and which volumes to display here

### Client Specifications

* No specification

## Rank Advancement

### Summary

* This feature is a way for the user to see the qualifications for the different ranks and their progress toward those qualifications
* If multiple qualification legs exist for a rank, all legs will be shown
* The code takes the titles for the qualifications provided in the Commission Plan and gives a more user friendly definition of the qualification
* The qualifications can be weighted (set up with the commissions team) to ensure the percentage shown more accurately reflects the user’s progress to the next rank

### Functionality

* The user’s Payable As rank for the current period is used to determine which rank is shown to begin with
* Currently uses period type of weekly

### Client Specifications

* No specification

## Volumes

### Summary

* This report shows specified volumes for a certain period type

### Functionality

* Currently uses period type of weekly
* Only shows periods where the start date is less than or equal to the current date
* Please specify which volumes you would like shown here

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Organization

## Enroll New

### Summary

* This is a link that will take the user to the enrollment, which is normally in the public site

### Functionality

* No special functionality

### Client Specifications

No specification

## Reports

### Personally Enrolled Team

#### Summary

* Shows the personally enrolled distributors for the user

#### Functionality

* Pulls data from Enroller Tree
* Currently initially sorted(Z – A) by the customers’ email

#### Client Specifications

* No specification

### Upcoming Promotions

#### Summary

* Shows the upcoming ranks for customers in the user’s downline for the current period

#### Functionality

* Currently pulls data from Enroller Downline
* Uses period type Weekly

#### Client Specifications

* No specification

### Downline Ranks

#### Summary

* Shows the breakdown of the user’s downline by rank(right of the screen)
* Shows report for the user’s downline that shows rank basic information about the customers

#### Functionality

* Unilevel Downline is used for section on right
* Unilevel Tree is used for report

#### Client Specifications

* No specification

### Downline Orders

#### Summary

* Shows recent orders in the user’s downline

#### Functionality

* Pulls from Unilevel Downline
* Shows orders in the past 2 weeks
* Only shows orders with status IDs of 7 or greater(Accepted, Printed, Shipped, Pending Inventory)

#### Client Specifications

* No specification

### Downline Auto Orders

#### Summary

* Shows recent auto orders in the user’s downline

#### Functionality

* Pulls from Unilevel Downline
* Only shows auto orders with status IDs of 0 (Active)

#### Client Specifications

* No specification

### New Distributors

#### Summary

* Shows the distributors in the user’s downline, ordered by their created date

#### Functionality

* Pulls from Unilevel Downline

#### Client Specifications

* No specification

### Preferred Customers

#### Summary

* This report shows the preferred customers in the user’s downline

#### Functionality

* Currently only showing customers whose EnrollerID is the user that is logged in

#### Client Specifications

* No specification

## Tree Viewer

### Customer Details

#### Summary

* Shows basic information about the customer being viewed
* Optionally, a button can be shown in this section for customers who are personally enrolled so the user can view additional information about that person via the profile modal

#### Functionality

* The Paid Rank and Highest Rank are pulled from PeriodVolumes for the current period(period type of Weekly)

#### Client Specifications

* No specification

### Search

#### Summary

* The user can search for customers by customer ID, first name, or last name

#### Functionality

* No special functionality

#### Client Specifications

* No specification

### Upline

#### Summary

* This section shows the upline of the currently selected customer for the type of tree being used(Unilevel or Binary)

#### Functionality

* No special functionality

#### Client Specifications

* No specification

### Waiting Room

#### Summary

* If the concept of a waiting room exists for your company, this is where the customers in the user’s downline who meet waiting room criteria will appear
* Customers who appear in this list can be placed directly into the tree

#### Functionality

* Please specify the rules for customers that should appear in the waiting room

#### Client Specifications

* No specification

### Tree

#### Summary

* This is a graphical representation of the user’s downline based on the type of tree your company uses(Binary or Unilevel)
* Open positions can be shown for placements via the tree

#### Functionality

* The nodes are color coded against a key based on their rank(current period, Weekly type)
* Open nodes links to your company’s enrollment, passing along the needed placement information
* For display and loading time reasons, the current number of levels down in the selected customer’s downline that are pulled when a node is clicked is 3

#### Client Specifications

* No specification

## Recent Activity

### Summary

* This feature shows the user’s most recent Customer Wall activity

### Functionality

* Currently shows 50 records
* The items shown here are triggered through events which will need to be specified with the commissions team

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Events

## Create Event

### Summary

* This page is where the customer creates the events that will be displayed in the Calendar and Agenda pieces

### Functionality

* No special functionality

### Client Specifications

No specification

## Agenda

### Summary

* This is an alternate way to view the event from the calendar, shown in a day planner style

### Functionality

* No special functionality

### Client Specifications

* No specification

## Calendar

### Summary

* The calendar allows the user to see corporate events, create public or private events of their own, and subscribe to other distributor’s calendars to see their public events

### Functionality

* The corporate calendar events are managed through a specified account. Please provide the account ID of the user you intend to created corporate events with
* When a user logs into the backoffice, if they are not already subscribed to the corporate calendar, they are then subscribed to it
* The Calendar event types you would like to use will need to be specified as well as the colors you would like them to display on the calendar as
* In order to see the holidays on the calendar, you will need to create a google account and obtain an API key. See this site for more information on this <http://fullcalendar.io/docs/google_calendar>

### Client Specifications

* No specification

## Subscriptions

### Summary

* This is the page where the user will manage the calendars they are subscribed to
* The corporate account that all users are automatically subscribed to can optionally be shown

### Functionality

* Please specify whether or not to show the corporate account
* If the corporate account is shown, please specify if the user should be able to unsubscribe from this account
* The subscription search currently finds results for customer ID, first name, or last name

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Auto Orders

## Auto Order Preferences

### Summary

* This feature is where the user can manage their auto orders. They can stop an auto order, or modify the items/quantities on it. The payment, processing, shipping address, and ship method can also be changed here
* As a note, the item selection shown in the Edit/Add Items modal may not reflect the items shown on the auto order. This is data related and will not be the case in a real scenario

### Functionality

* Items shown in the Edit/Add Items modal are limited to items in the specified web category that have the AllowOnAutoOrder flag set to “true” and the price is greater than $0
* Please specify the available frequency types the user can choose from

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Orders

## Order History

### Summary

* This page shows the user all of their past orders and lets them see them categorized by the status of the order
* Users can also search for an order by order ID

### Functionality

* No special functionality

### Client Specifications

* No specification

## Order Invoice

### Summary

* This page shows invoice data for an order

### Functionality

* No special functionality

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Resources

## Resource Library

### Summary

* This feature is where the user will have access to any resources that your company uploads. These resources are shown in their respective categories

### Functionality

* No special functionality

### Client Specifications

* No specification

## Manage Resources

### Summary

* Only the specified Account IDs will have access to this feature
* An Extended Database table is used to store links to the content, which will need to be hosted externally to the site
* Categories are created to sort the different resources

### Functionality

* Please provide us with the account IDs that you want to have access to manage the resources

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Store

## Flow

The following features are the different steps in the sample site’s shopping process. They appear in the order they are listed here. If any restructuring of this process (other than simply removing steps) is needed please specify this here:

* No specification

## Item List

### Summary

* Displays items specified for the [Configuration](#Configurations) being used
* When items are clicked, the user is taken to the Item Detail page to add it

### Functionality

* No special functionality

### Client Specifications

* No specification

## Item Detail

### Summary

* This page shows more information on the chosen item and allows the user to add the item to the cart
* If the item’s AllowOnOrder flag is set to true, the option to add to auto order is shown here as well

### Functionality

* No special functionality

### Client Specifications

* No specification

## Cart

### Summary

* The cart shows all the items added to the order to be created today(if any) as well as the items to chosen for auto order(if any)
* The user can remove or modify the quantity of the items at this point
* The subtotal for the Today’s Order items is shown. At this point the shipping information may not have been stored, so we do not calculate the order just yet

### Functionality

* No special functionality

### Client Specifications

* No specification

## Shipping

### Summary

* The customer can choose an address they have on file(if any) or use a new address

### Functionality

* In our sample site, the shipping address will be used for the auto order if one is to be created. Optionally, we can break this out to where the auto order gets its own shipping information page

### Client Specifications

* No specification

## Auto Order Configuration

### Summary

* This page only appears if the user has added auto order items
* They can choose from the frequency types specified by your company and set the start date here

### Functionality

* Please specify the frequency types you want to display

### Client Specifications

* No specification

## Payment

### Summary

* The customer can choose a payment method they have on file(if any) or use a new payment method

### Functionality

* In our sample site, the shipping address will be used for the auto order if one is to be created. Optionally, we can break this out to where the auto order gets its own payment information page
* Credit Card and checking accounts are options in our sample site, please specify which payment types your company accepts

### Client Specifications

* No specification

## Review

### Summary

* This is a final review of the information the customer has chosen for the order
* Item can be removed or have their quantities modified here again
* The ship method can be chosen at this point
* The order and or auto order are calculated and the full summary(s) are shown on the right

### Functionality

* No special functionality

### Client Specifications

* No specification

## Order Complete

### Summary

* This is the final page that tells the customer their order has been place

### Functionality

* The sample site give a link to the Orders page at this point

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Account

* These pages are reached by clicking the Change Settings button in the dropdown in the top right of the site header.

## Account Settings

### Summary

* This is the area where the user can change information about their account

### Functionality

* The fields in the Website Information section are stored in the CustomerSite table. This is done so that the customer can provide alternate information about themselves (other than what is found in their Customer table). The information in this section is generally used in the customer’s replicated site (if your company has this)

### Client Specifications

* No specification

## Avatar

### Summary

* This feature allows the user to choose a stock image, upload a photo, or use an existing externally hosted image as their avatar, which is used throughout the site
* The stock avatars can be changed for your company if desired

### Functionality

* Allowable image formats include: jpg, jpeg, pjpeg, gif, x-ping, and png

### Client Specifications

* No specification

## Addresses

### Summary

* This is where the user will manage their addresses on file or add them if none exist.

### Functionality

* The primary(Main) address cannot be deleted, only edited
* If more than one address exists, the user can change any non-primary addresses to be their primary address
* The Add New Address button will show as long as the customer has less than 3 addresses stored in the system, they will need to delete one to add a different address

### Client Specifications

* No specification

## Payment Methods

### Summary

* This page allows the user to provide or update their payment methods. Credit cards and bank accounts can be managed here

### Functionality

* If a card is tied to any auto orders, it cannot be deleted and will be labeled an ”Auto Order Card”. If the card is edited, the customer will be shown a message telling them that the change will apply to all auto orders tied to that card

### Client Specifications

* No specification

## Direct Deposit

### Summary

* This feature allows the user to provide or update their direct deposit bank account information for commission payout

### Functionality

* No special functionality

### Client Specifications

* No specification

## Notifications

### Summary

* This is where the user will manage their email opt-in status

### Functionality

* The base code requires double opt-in, which means that once the customer chooses to opt in and receive emails, they will be sent an email that requires them to click a link to confirm they truly want to be opted in

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added. Be sure to include as many details as possible as it will help us to identify the best solution to adding these. If you currently have an existing backoffice, provide a URL so we can see the feature working.

* No Additional Features

# Profile

* This page is reached by clicking the View Profile button in the dropdown in the top right of the site header
* This page accepts a customer ID via an encrypted token that allows different customers information to be displayed
* This page can also be shown as a modal, which can be called from any page. You may want customers to be able to click a row in a report to show the information for that row’s customer. For an example of this, click a user in the Your Newest Distributor’s on the Dashboard page

## Activity

### Summary

* This tab shows the recent activity(Customer Wall) for the customer being viewed as well as some volumes and basic information for the user
* Sensitive information can be restricted for customers who are not personally enrolled by the user

### Functionality

* Please specify which volumes and information to use here
* The Rank in the sample information is pulled from the Highest Rank Achieved in the Customer table

### Client Specifications

* No specification

## Volumes

### Summary

* This report shows specified volumes for a certain period type

### Functionality

* Currently uses period type of weekly
* Only shows periods where the start date is less than or equal to the current date
* Please specify which volumes you would like shown here

### Client Specifications

* No specification

## Order List

### Summary

* Shows the customer’s orders, ordered by the most recent order date

### Functionality

* Only shows orders with status IDs of 7 or greater(Accepted, Printed, Shipped, Pending Inventory)

### Client Specifications

* No specification

## Auto Order List

### Summary

* Shows the customer’s auto orders, ordered by the next run date

### Functionality

* Only shows auto orders with status IDs of 0 (Active)

### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Global

* Elements that are site-wide will be listed here

## Language Selection

### Summary

* This dropdown is where the user will select the language they want to view the site in

### Functionality

* No special functionality

### Client Specifications

No specification

## Select a theme

* In our demo site, we have a Select Theme feature at the top. This feature is meant to show the ability to customize the site with your company’s style. This is demonstration feature and will not be an option your users will see.

## Expand Button

* This is located to the right of the Account/Profile dropdown above the cart button. This will expand the page to full screen

## Navigation

### Main Navigation

#### Summary

* Site navigation

#### Functionality

* In the demo site before the rest of the links, you will see the company’s logo(Bootstrap shown for Default Bootstrap Styles theme). This will show your company’s logo. The default action for this logo is to redirect back to the Dashboard page.

#### Client Specifications

* No specification

### Mobile Navigation

#### Summary

* Mobile version of the site navigation

#### Functionality

* No special functionality

#### Client Specifications

* No specification

## Additional Features

Please list any features that are not found in our base code that need to be added

* No Additional Features

# Questions

Please list any questions or concerns you have with any of the material listed or not listed here:

* (Questions here)