



# Distributor eSuite

## Back Office Administration

*This document provides an overview of the distributor's **eSuite** administrative system. The contents of this manual should be kept confidential to It Works! Global distributors.*



Version 1.0



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## I. Distributor eSuite

The It Works! **eSuite** system is your administrative back office that allows you to manage your business online. When you first login, the system dashboard will display as your home page. This dashboard provides you with key information about your business and is broken down into the following segments:

- My Rank Promotion Status
- Distributors closest to promotion
- Volumes
- Performance Overview
- Recent Activity
- Earnings

The dashboard features a top navigation bar with icons for Messages, Commissions, Reports, Rank, Document Library, Auto-Shipments, Settings, Calendar, Orders, Training Academy, and Support. The main content area is divided into several segments:

- My Rank Promotion Status:** Shows a 100% progress bar for Ambassador Diamond. Below this, it lists:
  - 8 Qualified Legs (100% to goal of 5)
  - 4 Double Diamond Legs (80% to goal of 5)
  - 4 Triple Diamond Legs (100% to goal of 3)
  - 3 Presidential Diamond Legs (100% to goal of 1)
- Distributor's closest to promotion:** A list of distributors with their progress towards the next rank:
  - 72% to promoting to Ambassador Diamond
  - 75% to promoting to Presidential Diamond
  - 98% to promoting to Diamond
  - 94% to promoting to Diamond
  - 89% to promoting to Diamond
- Volumes:** Includes a gauge for Personal Bonus Volume (644 PV out of 2400) and a counter for Qualified Legs (8). A table below shows volume data for August 2013 and July 2013.
- Performance Overview:** A summary table for the current period (August 2013):
 

Current Paid Rank	Ambassador Diamond
Previous Month Paid As	Ambassador Diamond
Highest Rank Achieved	Ambassador Diamond

If additional information is available, click on the link at the bottom of each segment to drill down into the information.

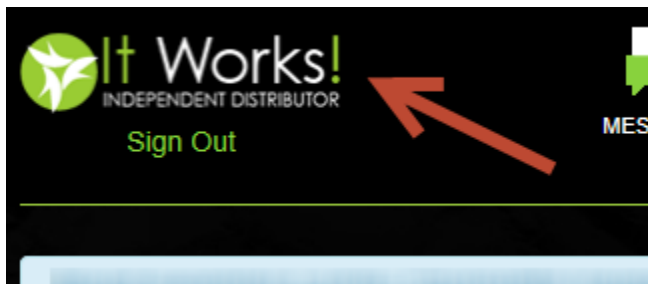
★ Learn More      View Volumes



To navigate through the system, click on the tabs at the top of the screen. These tabs include:

- Messages
- Commissions
- Reports
- Rank
- Document Library
- Auto-Shipments
- Settings
- Calendar
- Orders
- Training Academy

*To return to the dashboard from anywhere in the system, click on the It Works! logo on the top left-hand side of the screen.*

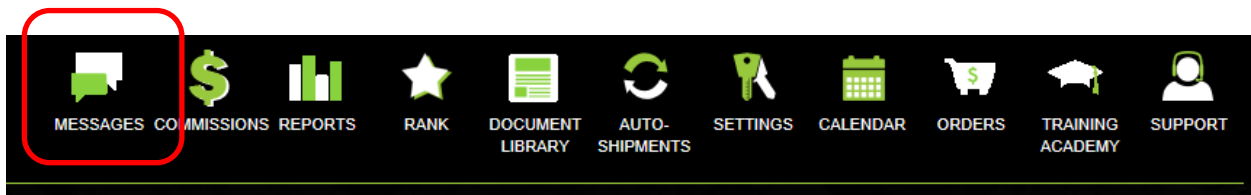


## II. eSuite Sections and Functionality

The following summarizes the functionality available under each tab.

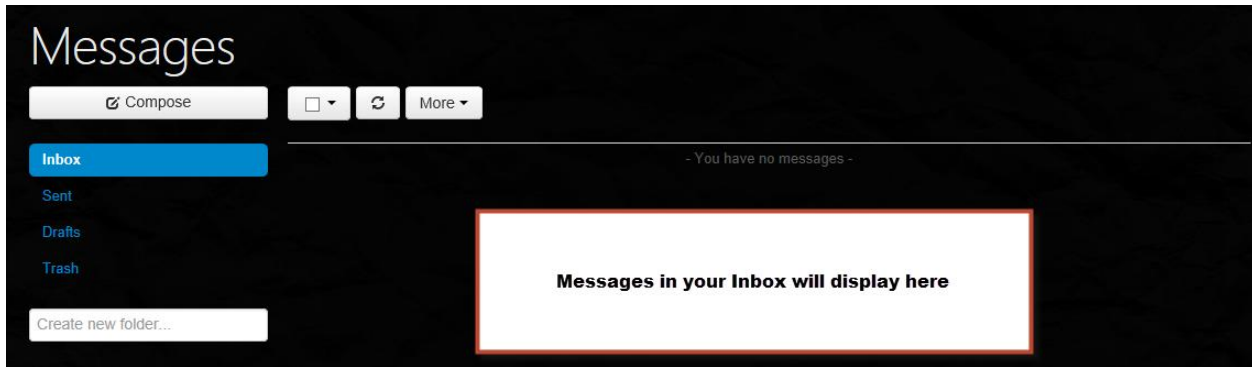
### A. Messages

The Messages section contains basic email functionality. It allows you to send emails to external users and anyone within your organization.

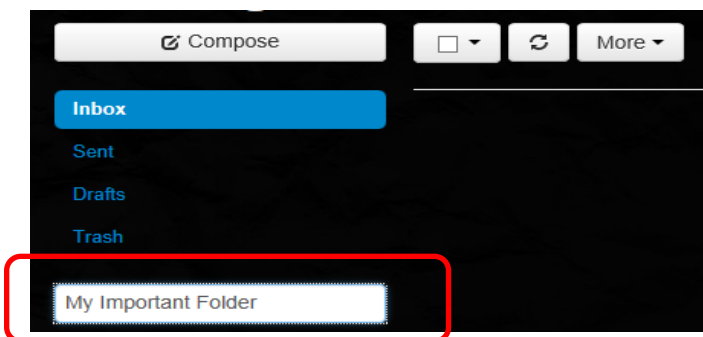


When you click on **MESSAGES**, the system will display your inbox screen. You can also navigate to you Sent, Drafts and Trash folders.

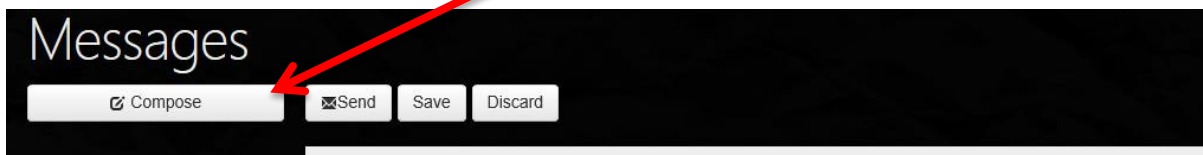




If you want to create your own folder, click on the **Create New Folder** box and enter the new folder name.

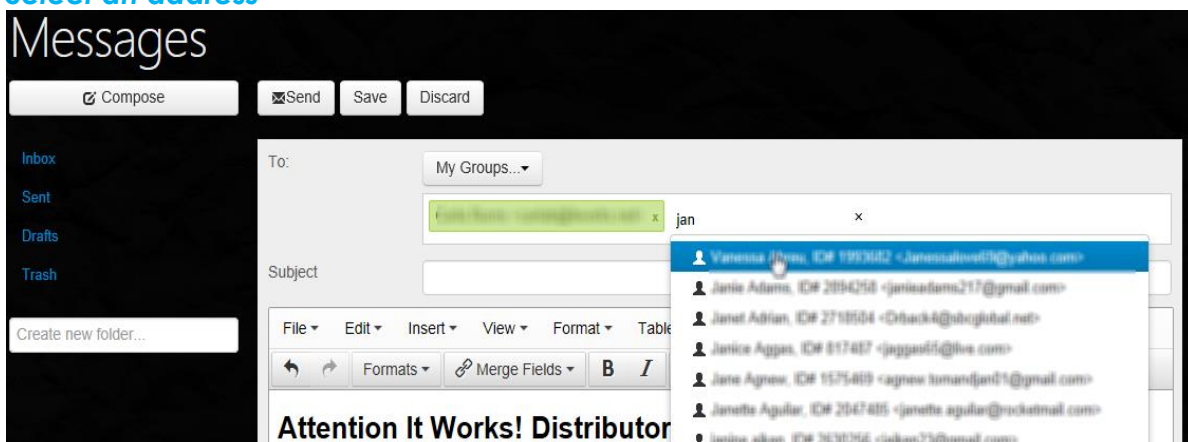


To create a new message, click on **Compose**.

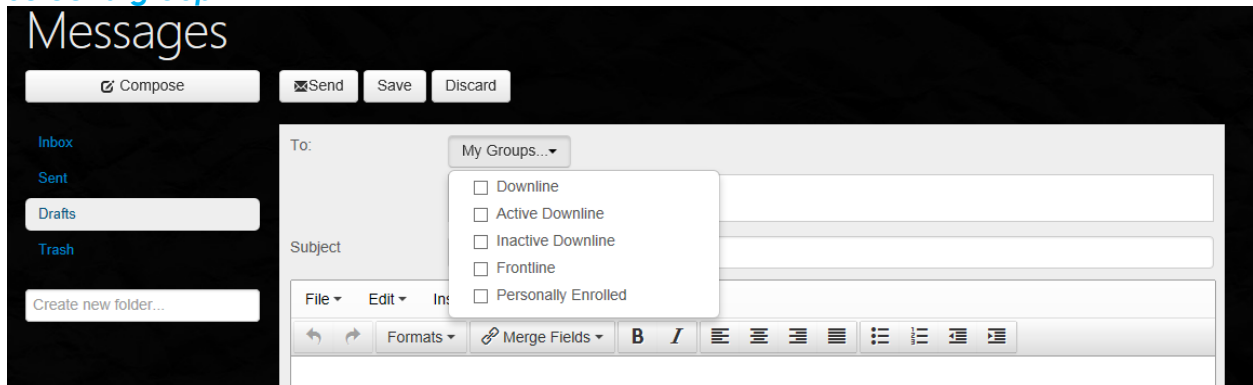


You can enter a specific email address or select a group. If you start typing in the TO box, the system will provide a selection list based on your entry.

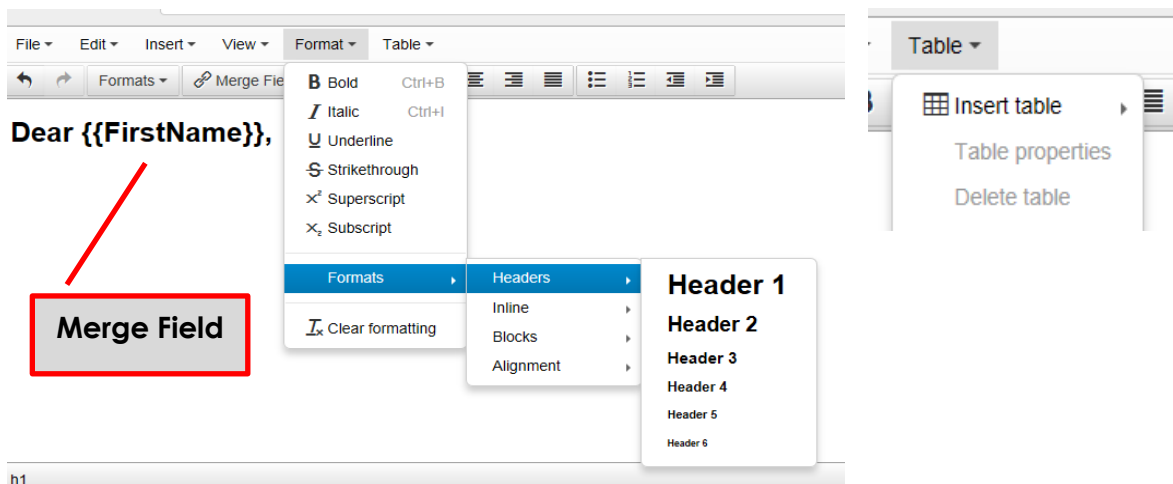
### Select an address



## Select a group

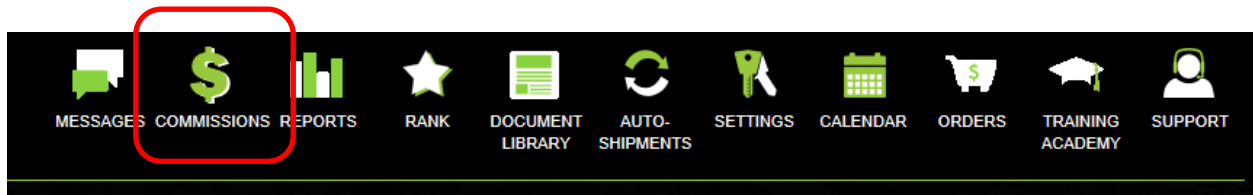


Message formatting is available along with the ability to insert tables and merge fields.

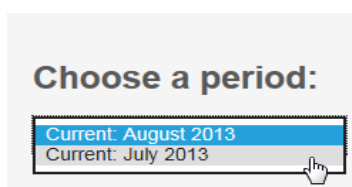


## B. Commissions

The Commissions section allows you to select any past commission run and view the associated volumes and payments that were earned during that period. You can also search for specific historical volumes and export the data to Excel for personal analysis.



When you click on **COMMISSIONS**, select the commission period to view.



The screen will display information about the period selected, volumes earned and the breakdown of the bonus payments.

**Choose a period:**

Current: July 2013

---

### Period Summary

Description	Value
Start Date	Monday, July 1, 2013
End Date	Wednesday, July 31, 2013
Paid As	Triple Diamond
Total Commissions	\$52,710.15

### Bonuses

Description	Earned
<a href="#">Emerald Bonus</a>	\$1,175.13
<a href="#">Level Bonus</a>	\$4,236.69
<a href="#">Enroller Bonus</a>	\$135.55
<a href="#">Generation Bonus</a>	\$2,205.91
<a href="#">Generational Enroller Bonus</a>	\$1,756.69
<a href="#">Double Diamond Bonus</a>	\$36,120.00
<a href="#">Diamond Bonus</a>	\$240.00
<a href="#">Triple Diamond Bonus</a>	\$195.00

### Volumes

Description	Earned
PBV	120
GV	14,105,650
Autoship Template	252

Bonus Type	Percentage
Double Diamond Bonus	78.4%
Level Bonus	9.2%
Emerald Bonus	4.8%
Other Bonuses	8.6%

To view details about each bonus, click on the bonus name.

### Bonuses

Description	Earned
<a href="#">Emerald Bonus</a>	\$1,175.13
<a href="#">Level Bonus</a>	\$4,236.69
<a href="#">Enroller Bonus</a>	\$135.55



The bonus breakdown will show who the bonus was earned on, order ids, rank levels, source amount and the amount earned.

## Bonus Breakdown

Search:

From: ID  Equals  Search by a number ...

ID	Name	Order	Level	Paid Level	Source Amount	Commission
276446	Kaylee Ram	13892413	6	6	\$54.00	\$1.00 (2%)
217107	Carvella Lynch	13892416	6	6	\$53.00	\$1.00 (2%)

Click on the **Volumes** selection to view historical volumes from past commission runs.

## Commissions

COMMISSIONS  
Commissions  
**Volumes**  
Back to dashboard

### Current Volumes

Qualified Legs	PBV	GV
4	1,190	10,386,302

### Historical Volumes

Search:

Period ID  Equals  -- Any --

Period	Highest Rank Achieved	Paid As Rank	Qualified Legs	PBV	GV
August 2013 8/1/2013 - 8/31/2013	Triple Diamond	Triple Diamond	4	1,190	10,386,302
July 2013	Triple Diamond	Triple Diamond	3	120	14,105,650

## C. Reports

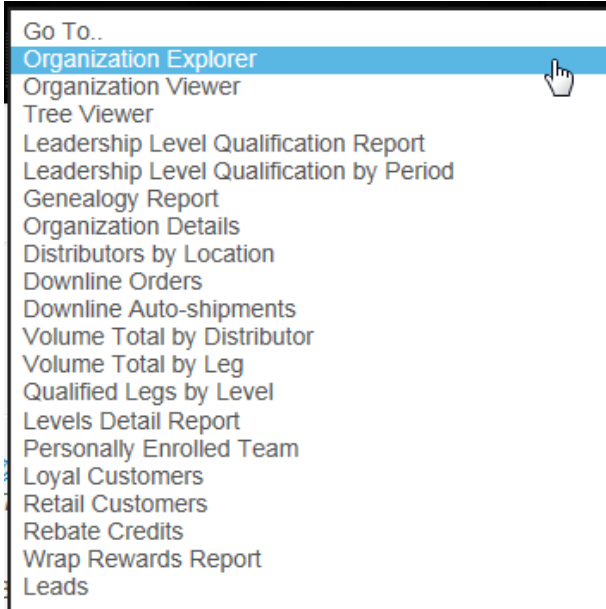
From the Reports section, you can run standard reports and export the data to Excel as needed.

MESSAGES COMMISSIONS **REPORTS** RANK DOCUMENT LIBRARY AUTO-SHIPMENTS SETTINGS CALENDAR ORDERS TRAINING ACADEMY SUPPORT



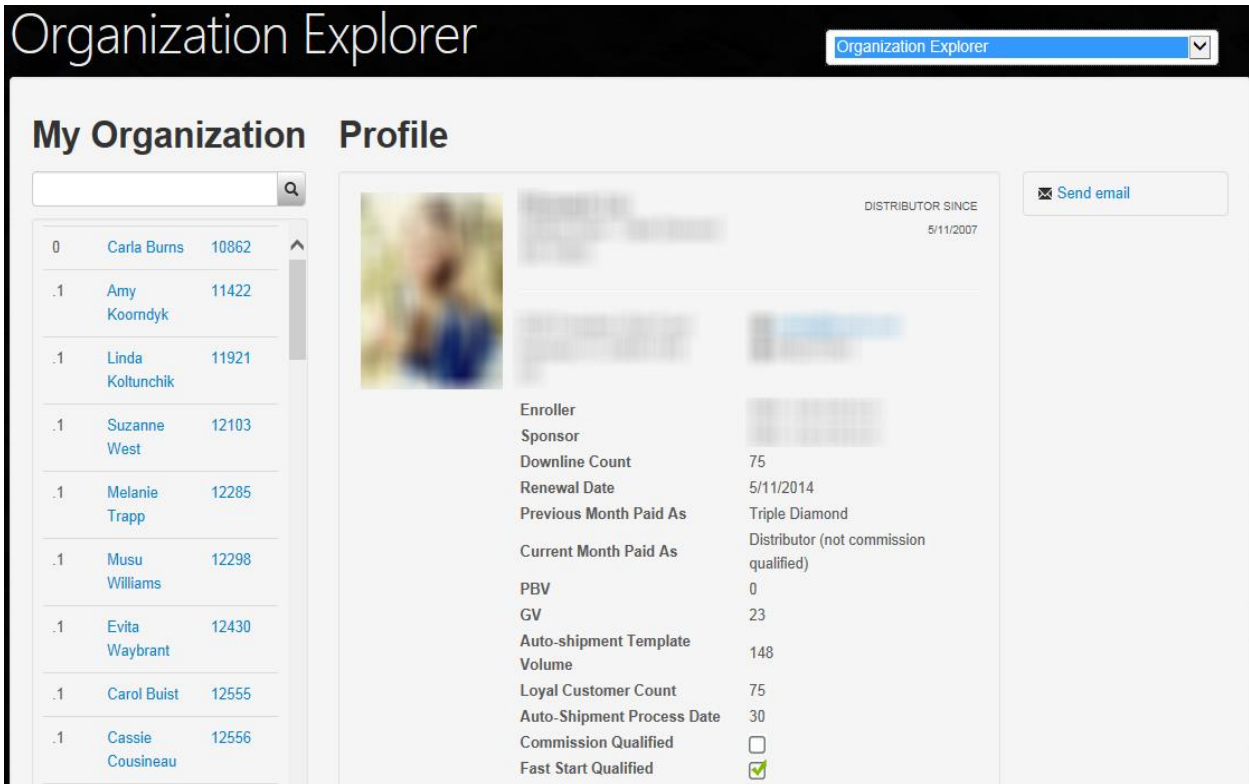


The reports currently available include the following:



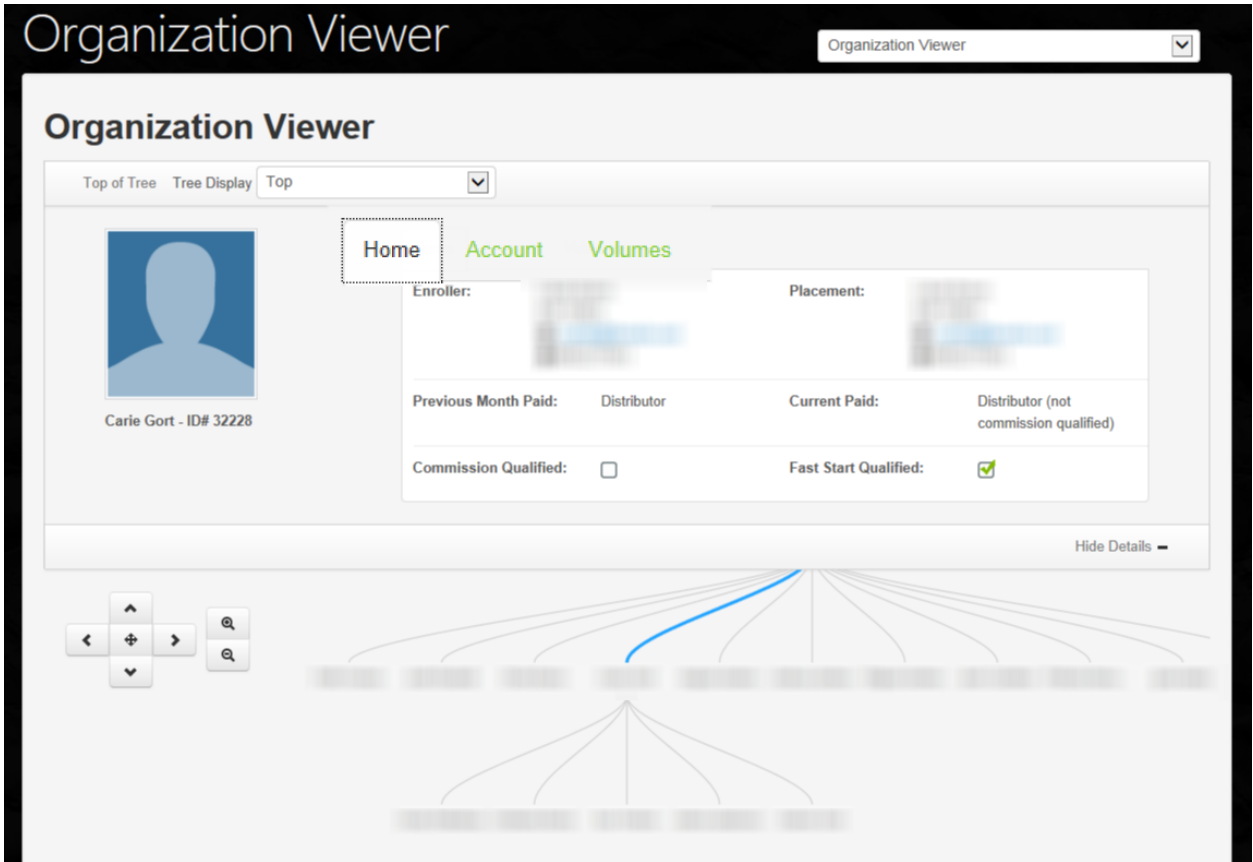
**a) Organization Explorer**

- a. This report provides a summary of your key information such as your account information, auto-shipments, rank promotions, recent activity, sponsor levels and recent orders



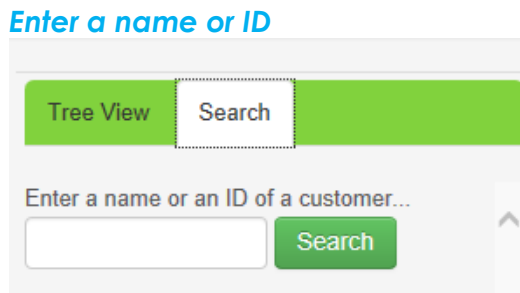
**b) Organization Viewer**

- a. The organization viewer provides a graphical view of your organization and allows you to select someone in your downline and get additional information.



**c) Unilevel Tree Viewer**

- a. The tree view report provides a graphical view of your downline and detailed information on each account. You can search for a specific distributor or loyal customer or display your entire downline list.





**e) Genealogy Report**

- a. The genealogy report displays levels, ranks, volumes, auto-shipment dates and whether or not the distributor is commission qualified.

Level	ID	First Name	Last Name	Email	Previous Month Paid As	Current Paid	PGV	PV	GV	Auto-Shipment Process Date	Commission Qualified
0					Triple Diamond	Triple Diamond				30	✓
....4					Distributor (not commission qualified)	Distributor (not commission qualified)	0	0	0	No auto-shipment set up	✗
.1					Distributor (not commission qualified)	Distributor (not commission qualified)	0	0	81	No auto-shipment set up	✗

**f) Organization Details**

- a. The genealogy report displays levels, ranks, volumes, auto-shipment dates and whether or not the distributor is commission qualified.

Level	ID / Name / Email	Previous Month Paid As	Current Paid	PBV	Auto-Shipment Template Volume	GV	Auto-Shipment Process Date	Commission Qualified	Actions
0		Triple Diamond	Distributor (not commission qualified)	0	148	23	No auto-shipment set up	✗	[Email] [Dropdown]
....4		Distributor (not commission qualified)	Distributor (not commission qualified)	0	0	0	No auto-shipment set up	✗	[Email] [Dropdown]
.1		Distributor (not commission qualified)	Distributor (not commission qualified)	0	0	0	No auto-shipment set up	✗	[Email] [Dropdown]

**g) Distributors by Location**

- a. The distributors by location report provides a graphical view of where your downline is located. It defaults to the country level where you can drill down to the state level. When you hover over a location, it will display a count of your distributors or loyal customers based on your selection.



# Distributors by Location

Distributors by Location

### Options

- Entire Downline
- Personally Enrolled

### Customer Type

- Distributors
- Loyal Customers
- All Customers

Zoom Out

US-TX  
Distributor Count: 114633

## h) Downline Orders

- This report provides a list of all your downline orders with the ability to search for specific accounts or orders.

# Downline Orders

Downline Orders

Export Report 962762 record(s) Search by name or ID...

### Advanced Search

ID# [v] Equals [v] Search... [Search] [Reset]

Name	Order ID	Total	BV	Date	Actions
[Name]	16370785	\$28.95	8	31 - AUG - 2013	[Email] [v]
[Name]	16370784	\$44.35	30	30 - AUG - 2013	[Email] [v]

## i) Downline Auto-Shipments

- This report provides a list of all your downline auto-shipments including next run date, order amount and BV total. It also provides the ability to search for a particular account.

# Downline Autoshipments

Downline Auto-shipments

Export Report 110243 record(s) Search by name or ID...

### Advanced Search

ID# [v] Equals [v] Search... [Search] [Reset]

ID	Name	Next Run Date	Total	BV	Actions
[ID]	[Name]	1 - JAN - 2079	\$20.00	0	[Email] [v]
[ID]	[Name]	28 - MAY - 2014	\$121.80	98	[Email] [v]



**j) Volume Total by Distributors / Leg**

- a. The volume total reports provide information on your downline's bonus and group volumes.

### Volume Total by Distributor

Volume Total by Distributor

Export Report 102954 record(s) Search by name or ID...

**Advanced Search**

Period [v] Equals [v] August 2013 [v] Search Reset

Level	ID	First Name	Last Name	Prior Month Paid As	Current Paid	PBV	GV	Actions
0	10000	John	Smith	Triple Diamond	Triple Diamond	1190	10,386,302	[x] [v]
.1	10001	John	Smith	Triple Diamond	Triple Diamond	1190	10,386,302	[x] [v]

### Volume Total by Leg

Volume Total by Leg

Export Report 10 record(s) Search by name or ID...

**Advanced Search**

Period [v] Equals [v] August 2013 [v] Search Reset

ID	First Name	Last Name	Prior Month Paid As	Current Paid	GV	Actions
10000	John	Smith	Presidential Diamond	Presidential Diamond	10,386,302	[x] [v]
10001	John	Smith	Distributor	Distributor (not commission qualified)	0	[x] [v]
10002	John	Smith	Distributor	Distributor	0	[x] [v]

**k) Qualified Legs by Level**

- a. This report shows the same basic information as the volume total reports.

### Qualified Legs by Level

Qualified Legs by Level

Export Report 102954 record(s) Search by name or ID...

**Advanced Search**

Period [v] Equals [v] August 2013 [v] Search Reset

Level	ID	First Name	Last Name	Prior Month Paid As	Current Paid	PBV	GV	Actions
0	10000	John	Smith	Triple Diamond	Triple Diamond	1190	10,386,302	[x] [v]
.1	10001	John	Smith	Presidential Diamond	Presidential Diamond	230	10,313,122	[x] [v]
.1	10002	John	Smith	Distributor (not commission qualified)	Distributor (not commission qualified)	0	0	[x] [v]



**l) Levels Detail Report**

a. This report lists your downline information by levels.

Level	ID	First Name	Last Name	Prior Month Paid As	Current Paid	PBV	POV	GV	Actions
0	10000	John	Smith	Triple Diamond	Triple Diamond	1190	1190	10,386,302	[X] [v]
.1	10001	John	Smith	Presidential Diamond	Presidential Diamond	230	230	10,313,122	[X] [v]

**m) Personally Enrolled Team**

a. This report provides information on accounts that you personally enrolled. This is also the report that you use to move eligible accounts to another distributor. If an account can be moved, it will be highlighted in green and you can use the Actions drop-down button to select **MOVE**.

**Go to the *How-To's* section to get more details on how to change a distributor's placement.**

ID	Name	Contact Info	Joined Date	PBV	Auto-Shipments Template Volume	GV	Auto-Shipments Process Date	Commission Qualified	Actions
10000	John Smith	john.smith@company.com	29 - Aug - 2013	0	54	0	25	X	[X] [v]
10001	John Smith	john.smith@company.com	30 - Aug - 2013	0	54	0	25	X	[X] [v]
10002	John Smith	john.smith@company.com	15 - Jul - 2013	419	108	419	15	✓	[X] [v]
10003	John Smith	john.smith@company.com	12 - Jan - 2008	230	109	10,313,122	22	✓	[X] [v]



**n) Loyal Customers**

- a. The loyal customers report provide a list of your loyal customers and their join dates.

Name	Contact Info	Joined Date	Actions
user	user@saadfi.com	8 - DEC - 2011	[X] [v]
Checkout	retail@itworks.net	16 - OCT - 2007	[X] [v]
Checkout	user@saadfi.com	2 - MAY - 2007	[X] [v]

**o) Retail Customers**

- a. The retail customers report provide a list of your retail customers and their join dates.

Name	Contact Info	Joined Date	Actions
saadfi	saadfi@saadfi.com	8 - FEB - 2012	[X] [v]
Checkout	retail@itworks.net	4 - JUN - 2013	[X] [v]

**p) Rebate Credits**

- a. This report provides a list of accounts that currently have rebate credits available.

ID	Name	Earned Date	Actions
----	------	-------------	---------





### q) Wrap Rewards Report

- a. The wrap rewards reports will show who you earned wrap rewards on, the earn date and when they expire.

ID	Name	Loyal Customer 1	Loyal Customer 2	Earned Date	Expire Date	Actions
1000	John Smith	1000001 John Smith	1000001 John Smith	Thursday, August 29, 2013	Monday, October 28, 2013	
1000	John Smith	1000001 John Smith	1000001 John Smith	Thursday, August 29, 2013	Monday, October 28, 2013	
1000	John Smith	1000001 John Smith	1000001 John Smith	Tuesday, August 27, 2013	Saturday, October 26, 2013	
1000	John Smith	1000001 John Smith	1000001 John Smith	Sunday, August 25, 2013	Thursday, October 24, 2013	
1000	John Smith	1000001 John Smith	1000001 John Smith	Thursday, August 22, 2013	Monday, October 21, 2013	

### r) Leads

- a. Use the leads report to keep track of any new business prospects. You can create new leads by selecting the **Create New Lead** button at the top of the report. You can also edit leads you have already entered.

Name	Contact Info	Actions
		Action ▾
		Action ▾
		Edit Lead
		Action ▾

Go to the **How-To's** section to get more details on how to create a new lead.

As with all the reports, you can export this list to Excel and format it as needed.

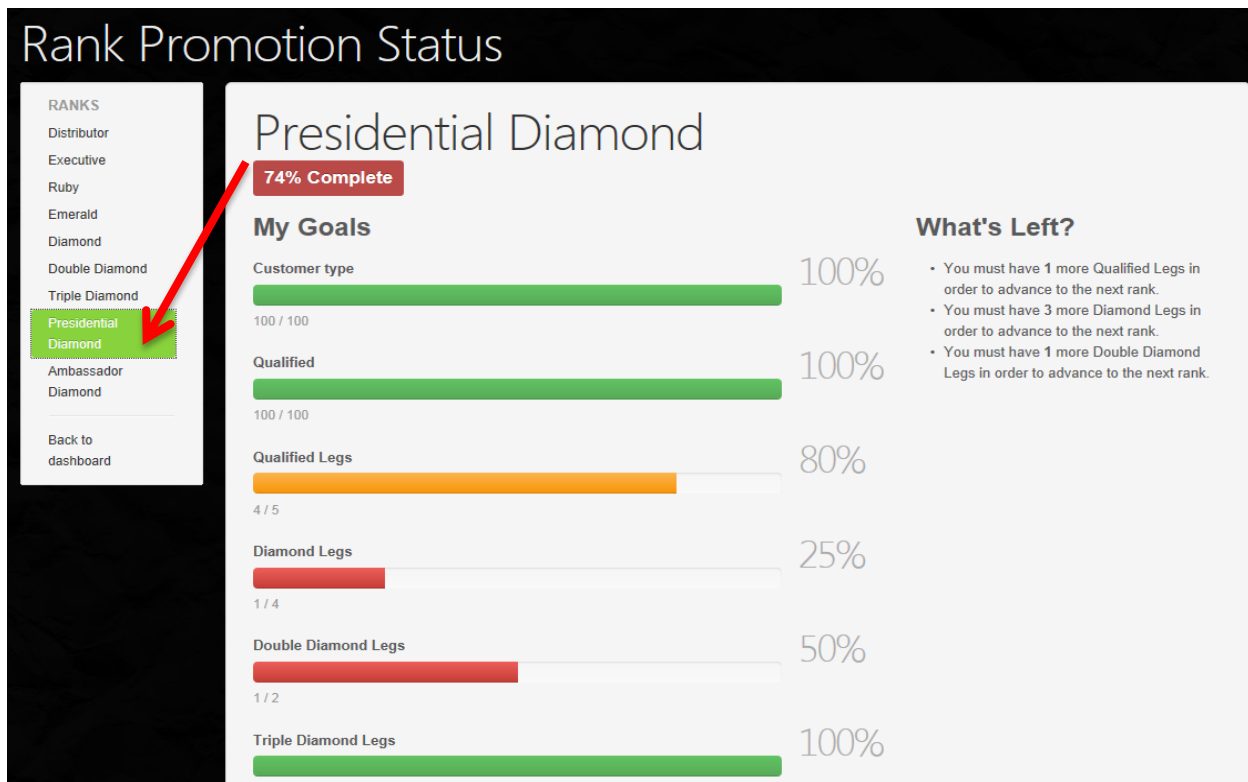


## D. Rank

The Rank section displays your current rank and what qualifications you need to achieve in order to promote to the next level. This provides a simple way to view your progress towards your organizational goals.

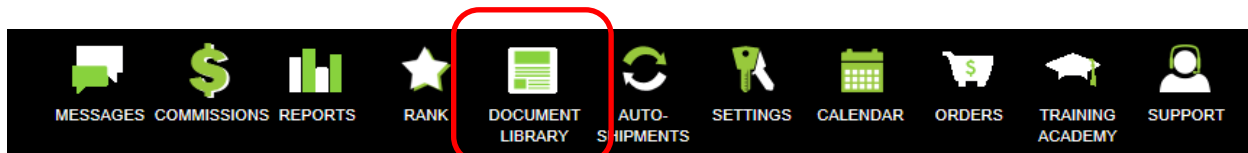


Select the rank from the left-hand menu to view where you stand on each rank.



## E. Document Library

The Document Library contains all corporate documents for downloading and viewing (not all current documents have been loaded yet).



Select the category you want and click on **Download** to view the document.










### Document Library

- All
- Awards and Certifications
- Commissions
- Events
- Forms
- Gives Back
- GOOD Bonus
- International
- Marketing Materials
- Policies and Regulations
- Product Info
- Training and Business Building


## Document Library


### AWARDS AND CERTIFICATIONS


	Certificate - Ambassador Diamond Certificate - Ambassador Diamond	<a href="#">Download</a>
	Certificate - Diamond Certificate - Diamond	<a href="#">Download</a>
	Certificate - Double Diamond Certificate - Double Diamond	<a href="#">Download</a>
	Certificate - Emerald Certificate - Emerald	<a href="#">Download</a>
	Certificate - Executive Certificate - Executive	<a href="#">Download</a>
	Certificate - Ruby Executive Certificate - Ruby Executive	<a href="#">Download</a>
	Certificate - Presidential Diamond Certificate - Presidential Diamond	<a href="#">Download</a>


## F. Auto-Shipments


Within the *Auto-Shipment* section, you can manage your auto-shipments which includes creating, editing and cancelling. You can also view a forecast of your downline's monthly auto-shipments to help estimate your future volumes.


  
MESSAGES


  
COMMISSIONS


  
REPORTS


  
RANK


  
DOCUMENT LIBRARY


  
AUTO-SHIPMENTS

  
SETTINGS

  
CALENDAR

  
ORDERS

  
TRAINING ACADEMY

  
SUPPORT

## My Auto-Shipments

AUTO-SHIPMENTS

- My Auto-Shipments
- My Auto-Shipment Cart
- Auto-Shipment Forecast

[Back to dashboard](#)

### Auto-Shipments

Create New Auto-Shipment
Manage e-Suite auto-shipment

#### Monthly Auto-Shipments

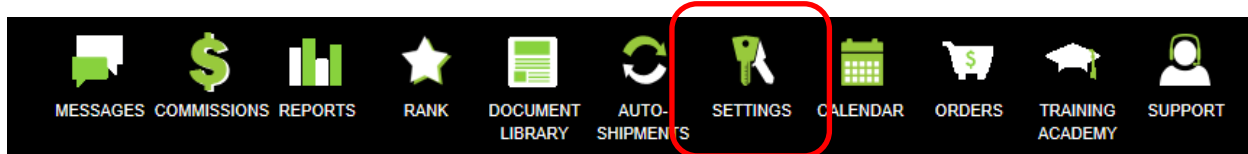
Description	Payment Method	Next Run Date	Total	BV	
Auto-Shipment #664953	Credit card ending in *****8920	10/21/2013	\$113.95	90	View Edit Cancel
Auto-Shipment #2340064	Credit card ending in *****8920	9/27/2013	\$67.36	54	View Edit Cancel
My Canada House	Credit card ending in *****8920	10/25/2013	\$73.78	54	View Edit Cancel
My Monthly Autoship	Credit card ending in *****8920	9/17/2013	\$72.71	54	View Edit Cancel

Go to the **How-To's** section to get more details on how to manage your product auto-shipments and eSuite subscription.



## G. Settings

The Settings section is where you manage your personal information including what is displayed on your replicated website. This includes setting up your shipping and billing profiles, payment information, website profile and more.



Click on the section you want to update from the left menu bar:

- **Settings** – personal information and addresses
- **Billing Profiles** – credit card set up
- **Login** – username and password
- **Website** – website information including picture and my story
- **Notifications** – subscribe / unsubscribe from company emails
- **Subscriptions** - eSuite subscription
- **Billing History** – view billing history
- **Commission Payment Method** – select payout method
- **Success on Demand** – access to Success on Demand

A screenshot of the 'My Account' page. The page has a dark header with 'My Account' in white. Below the header is a left sidebar with a white background and a dark border, containing a list of menu items: MY ACCOUNT, Settings, Billing Profiles, Login, Website (highlighted in green), Notifications, Subscriptions, Billing History, Commission Payment Method, Success On Demand, and Back to dashboard. The main content area has a dark header with 'Website Profile' in white. Below this is a form with a white background and a dark border. The form contains the following fields: a URL field with 'http://[redacted].myitworks.com', a 'Web Alias' field with a redacted value, 'First Name', 'Last Name', 'Company', 'Home Phone' (with a redacted value), and 'Office Phone' fields.

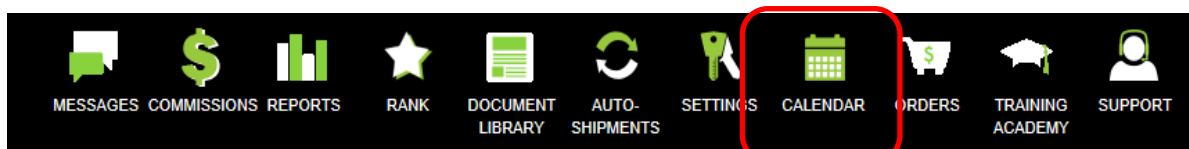
NOTE: Under the **Settings** section, if you change your main address, the system will ask you if you want to also change the address on your auto-shipment orders.



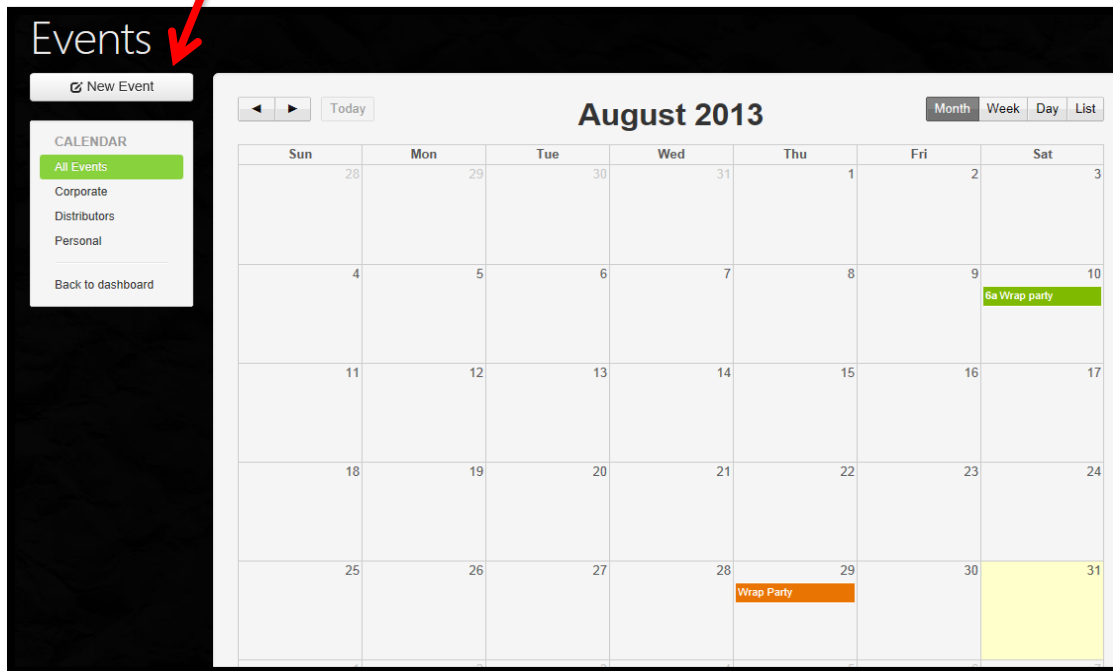
The screenshot shows the 'Personal Settings' page. On the left is a 'MY ACCOUNT' sidebar with links: Settings (highlighted), Billing Profiles, Login, Website, Notifications, Subscriptions, Billing History, Commission, Payment Method, Success On Demand, and Back to dashboard. The main content area is titled 'Personal Settings' and contains fields for First Name, Last Name, Company, Email, Home Phone, Mobile Phone, Office Phone, and Date of Birth. A modal window titled 'Address change detected' is overlaid, containing text: 'We noticed that you have made a change to one of your addresses on file. If you would like this change to reflect on your Auto-shipments as well, select the address that your Auto-shipments should be changed to and click Update Auto-shipments. Otherwise, click Just Save Changes to save your information without affecting your Auto-shipments.' Below the text are two radio buttons: 'Main Address' (selected) and 'Shipping Address'. The 'Main Address' is circled in red, and a red arrow points from it to the 'Main Address' form below. The 'Main Address' form includes fields for Country (United States), Address 1 (12345 State Street), Address 2, City (Bradenton), State (Florida), and Zip (34208), with a 'Verify Address' button. At the bottom of the modal are 'Just Save Changes' and 'Update Auto-shipments' buttons.

## H. Calendar

The *Calendar* section can be used to track personal events as well as show corporate events posted by IWG headquarters. It will also show events posted by your downline distributors.



Click on **New Event** to set up a new personal entry.



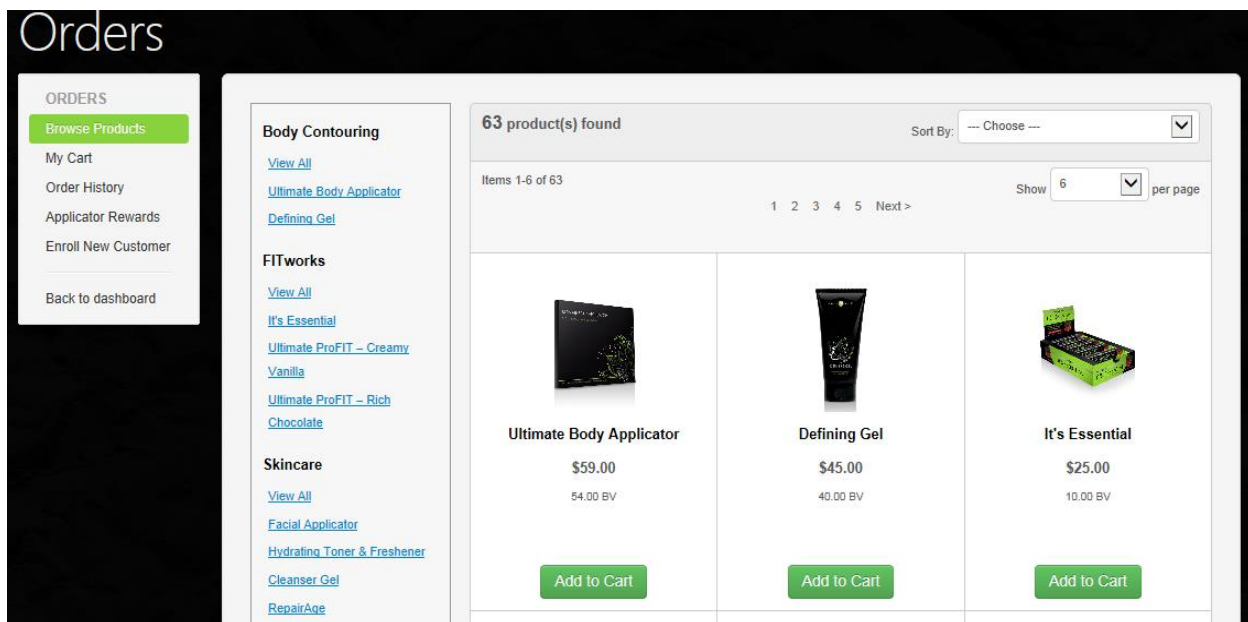
Enter the details on the entry screen and click **Save** to display your new event on the calendar. You can enter a different format for the date i.e. 9/10/13

The 'Create an Event' form is divided into two main sections: 'Event Date' and 'Event Details'.  
**Event Date:**  
- Calendar: Personal Calendar (dropdown)  
- Starts: Saturday, August 31, 2013 (text field) | 1:30 PM (text field)  
- Ends: Saturday, August 31, 2013 (text field) | 2:30 PM (text field)  
- Time Zone: Eastern Standard Time (EST) (dropdown)  
- Repeat Options: Do not repeat this event (dropdown)  
- Additional Settings:  All-day event,  Allow other distributors to see this event  
**Event Details:**  
- Event Type: Appointment (dropdown)  
- Title: Name your event. (text field)  
- Location: (text area with rich text editor toolbar)  
- Summary: (text area with rich text editor toolbar)



## I. Orders

The Orders section allows you to browse products, place a personal order, view your order history and redeem your applicator rewards. You will also be able to move order volume within 24 hours of placing an order (find orders eligible for moving under Order History, highlighted in green). This is also where you can access the new quick entry feature for setting up new customers and distributors.



Go to the **How-To's** section to get more details on how to place orders, redeem applicator rewards and enroll new customers.

## J. Training Academy

From the Training Academy section, you can access all the training materials designed to help you get started and to grow your business.





## K. Support

The support section is where you enter and track your Customer Service support ticket requests.



### My Account

**Support**

- Account Home
- Support
- Create new ticket

**Welcome** *First Name*

#### Support Tickets

Create New Ticket

**Attention** You have a new high priority ticket response. Please read it immediately.

Open Tickets Closed Tickets

Ticket#	Subject	Updated	Status
8080019	order Move	Saturday, August 31, 2013	New
8080006	New Ticket Create	Friday, August 30, 2013	New
8080003	<b>Important</b> Well Done	Friday, August 30, 2013	New





Go to the **How-To's** section to get more details on how to create and manage your support tickets.

### III. How-To's

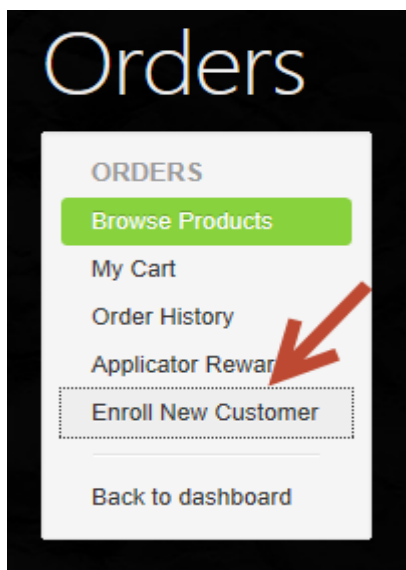
#### A. Enroll a Distributor, Loyal or Retail Customer (Quick Entry)

A new quick-entry feature is available where you can enter new distributors and customer without having to go through the replicated website to complete each enrollment.

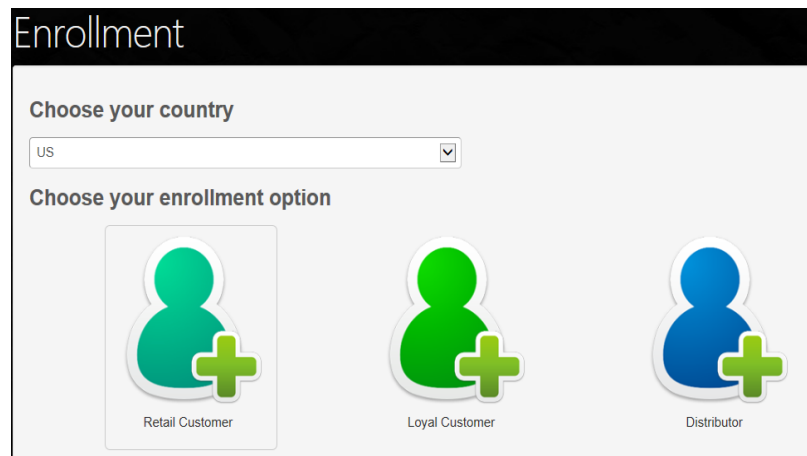
Select the **Orders** tab to display the main Order screen



From the left menu bar, select **Enroll New Customer**.



This will display the enrollment screen where you can select which type of account you want to enroll.



The enrollment products available and the quick-entry fields will change based on your country and the type of account you are setting up.

On the first screen, the system will allow you to enter the customer's enrollment order.

- If you are enrolling a distributor, the shopping cart will show the eSuite charge, products ordered today and products set up for auto-shipment.
- If you are enrolling a loyal customer, the shopping cart will show the products in both today's order and on the auto-shipment template.
- If you are enrolling a retail account, the shopping cart will only display the selected items.



Select the items you want for today's order by clicking on the **+1 Order** button or select the **+ 1 Auto-shipment** to add them to an auto-shipment order. *Click on the button(s) multiple times to increase the quantity.*

The screenshot displays the enrollment interface with a dark background. At the top left, the word "Enrollment" is followed by a US flag icon. In the top right, there are "Continue" and "< Go Back" buttons. The main content is organized into three columns. The left column features three category headers: "Business Builder Kits", "Boost!", and "Body Contouring". Under "Business Builder Kits", there is a card for "Business Builder Kit - US and Canada" priced at \$99.00 (0 BV) with an "Add Business Builder Kit - US and Canada" button. Under "Boost!", there are two cards: "Mini Booster Pack" at \$149.00 (60 BV) and "Booster Pack" at \$499.00 (400 BV), each with "+1 Auto-shipment" and "+1 Order" buttons. Under "Body Contouring", there are two cards: "Ultimate Body Applicator" at \$59.00 (54 BV) and "Defining Gel" at \$45.00 (40 BV), each with "+1 Auto-shipment" and "+1 Order" buttons. The right column contains three summary boxes: "Order" showing a subtotal of \$99.00 and BV Total of 0; "Auto-shipment" showing "Your cart is empty."; and "e-Suite" showing a subtotal of \$20.00 and a start date of 9/27/2013. At the bottom right, there are "Continue" and "< Go Back" buttons.

Once your order is complete, click **Continue** to enter the enrollment information.

The next screen provides all the fields required for setting up the type of account selected.

- a. If you are enrolling a **DISTRIBUTOR**, you will be required to enter the following information:

**Enrollment order (from prior screen)**

The shopping cart will include the products and business building kit selected. The auto-shipment and eSuite subscription will show in separate carts.

**Enroller & Placement**

This will default but you can change the placement (not the enroller)

**About You**

This includes name, phone numbers, tax id, email

**Your Address**

This will be the distributor's main address (during set up, the billing and



shipping address must be the same)

**Your Commissions**

This includes how you will receive your commission payments

**Your Replicated Website**

This is for setting up the distributor's website name and password

**Shipping Information**

This includes address and shipping method

**Billing / Payment Information**

Card name, number and expiration date

**Agreement to Terms and Conditions**

- b. If you are enrolling a **LOYAL CUSTOMER**, you will be required to enter the following information:

**Enrollment order**

The shopping carts will include any products selected for today's order or for the auto-shipment order

**Enroller & Placement**

This will default but you can change the placement (not the enroller)

**About You**

This includes name, phone numbers and email

**Your Address**

This will be the customer's main address (during set up, the billing and shipping address must be the same)

**Billing / Payment Information**

Card name, number and expiration date

**Agreement to Terms and Conditions**

- c. If you are enrolling a **RETAIL** account, you will be required to enter the following information:

**Your order**

The shopping cart will include any products selected

**About You**

This includes name and phone numbers

**Your Address**

This will be the customer's main address (during set up, the billing and shipping address must be the same)



## Example from Distributor Enrollment

### Application

Complete your distributor application below to complete your enrollment.

#### Enroller & Placement

Enroller ID	Placement ID	
<input type="text" value="10862"/>	<input type="text" value="10862"/>	<a href="#">Verify Placement ID</a>
Enroller	Sponsor	
Carla Burns Fitcoach LLC	Carla Burns Fitcoach Lic	

#### About You

Prefix:  Mr.  Ms.

First Name:

Last Name:

Daytime Phone:

Evening Phone (optional):

Mobile Phone (optional):

Fax Number (optional):

SSN/Tax ID:  SSN

Email:

I want to receive email communications.

#### Summary

**Your Order**

1 Business Builder Kit - US and Canada	
1 Ultimate Body Applicator	
Subtotal:	\$158.00
BV Total:	54

**Your AutoShip**

1 Defining Gel	
1 Ultimate Body Applicator	
Subtotal:	\$104.00
BV Total:	94
Start Date:	10/1/2013

**Your e-Suite Subscription**

1 eSuite and Personal Website (One month activation)	
Subtotal:	\$20.00
Start Date:	10/1/2013

## B. Manage Auto-Shipments

Under the Auto-Shipment tab, you now have more flexibility in managing your auto-shipment templates. You can create a new template, edit or cancel an existing template and/or change the date.

### 1. Create a New Auto-Shipment

Under the Auto-Shipment tab, select the **Create New Auto-Shipment**.

### Auto-Shipments

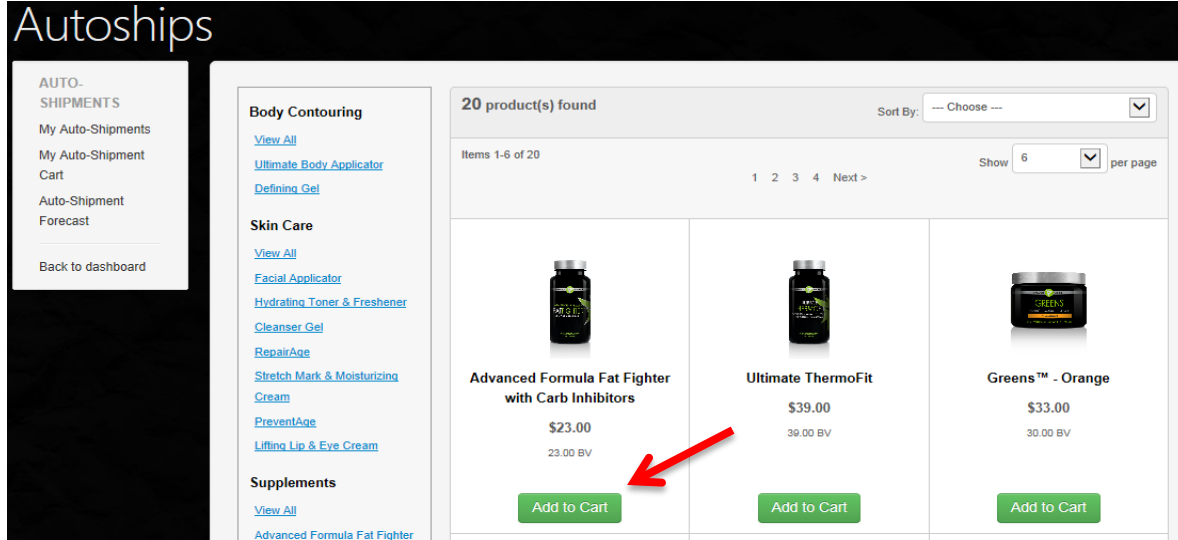
[Create New Auto-Shipment](#) [Manage e-Suite auto-shipment](#)

#### Monthly Auto-Shipments

Description	Payment Method	Next Run Date	Total	BV	
Auto-Shipment #664953	Credit card ending in *****8920	10/21/2013	\$113.95	90	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Cancel</a>
Auto-Shipment #2340064	Credit card ending in *****8920	9/27/2013	\$67.36	54	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Cancel</a>



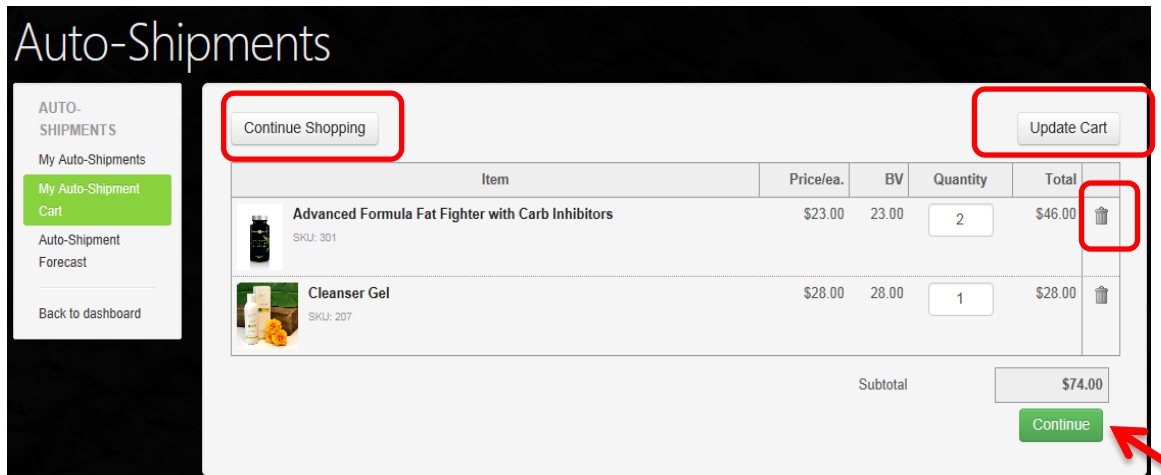
Select the items you want on your auto-shipment and click on **Add to Cart**



Once an item is selected, the shopping cart will display. From the cart, you can:

- Continue Shopping (this will take you back to the product listings)
- Change the quantity listed and Update Cart
- Delete items

Select **Continue** when you have completed your order.



The system will prompt you to enter your first ship date. This date will be used as the monthly ship date for all future orders. Due to company policy, you will only be allowed to enter a date between the 1<sup>st</sup> of each month and the 25<sup>th</sup>. The 25<sup>th</sup> is a change from our current rule to set them up no later than the 28<sup>th</sup>.



# Autoships

**AUTO-SHIPMENTS**

My Auto-Shipments

My Auto-Shipment Cart

Auto-Shipment Forecast

---

Back to dashboard

## Configure your autoship

When should your Auto-Shipment start?

Note: your processing date cannot be in the past.

Continue

The next step is to confirm your shipping address. You can select one that is already on file or enter a new address.

# Auto-Shipments

**AUTO-SHIPMENTS**

My Auto-Shipments

My Auto-Shipment Cart

Auto-Shipment Forecast

---

Back to dashboard

## Shipping Address

Is the address you'd like to use displayed below? If so, click the corresponding "Ship to this address" button. Or you can enter a new shipping address.

Ship to this address

Country/Region

12345 Main Street

Memphis, TN 38101-1234

USA

Phone: (901) 777-1234

Email: user@work.com

Ship to this address

Country/Region

12345 Main Street

Memphis, TN 38101-1234

USA

Phone: (901) 777-1234

Email: user@work.com

---

### Or enter a new shipping address

Be sure to click "Ship to this address" below when done.

Your name

First Name                      Last Name

Your email

Email Address

Your phone number

Primary

Your address

Street Address                      City                      State                      Zip Code

Country

Ship to this address

Based on the shipping address entered, the system will provide a list of the available shipping methods in your area. Select the shipping method and click **Continue**.



# Auto-Shipment

AUTO-SHIPMENTS

My Auto-Shipments

**My Auto-Shipment Cart**

Auto-Shipment Forecast

---

Back to dashboard

## Shipping Method

Choose a shipping speed:

- US Standard (7-14 business days) (\$3.95)
- US Ground (3-7 business days) (\$8.95)
- US 2Day (2 business days) (\$17.45)
- US Next Day (1 business day) (\$27.45)

[Continue](#)

The next step is to enter the payment information. Any existing credit card information on file will be displayed or you can add a new card.

# Autoships

AUTO-SHIPMENTS

My Auto-Shipments

**My Auto-Shipment Cart**

Auto-Shipment Forecast

---

Back to dashboard

## Choose a payment method

Is the payment method you'd like to use displayed below? If so, click the corresponding button. Or you can choose a new payment method.

Your stored payment methods	Name on card/account	Expires on
<a href="#" style="background-color: #4CAF50; color: white; padding: 5px 10px; border-radius: 3px;">Use my primary card</a>	Credit/Debit Card ending in 9696	Test Card
<a href="#" style="background-color: #4CAF50; color: white; padding: 5px 10px; border-radius: 3px;">Use my secondary card</a>	Credit/Debit Card ending in 1111	Master Account

### Or select a new payment method

**Credit or Debit Cards**

ItWorks accepts all American Express, Discover, MasterCard and Visa credit and debit cards.

[Use a new card](#)

Once the payment option is selected, the system will display a summary of your order. If everything is correct, click on **Save your Auto-Shipment**.



# Auto-Shipments

**Auto-Shipment Details**

**My Monthly Autoship**  
You will be billed for this Auto-Shipment monthly starting on Wednesday, September 25, 2013.  
(Change)

Shipping Information	Billing Information	Shipping Options
Shipping Address: (Change) 12345 Main St PO Box 12345 City, State, ZIP Phone: (555) 123-4567 Email: customer@domain.com	Payment Method: (Change) Primary credit/debit card ending in 8920  Billing Address: 12345 Main St PO Box 12345 City, State, ZIP Phone: (555) 123-4567 Email: customer@domain.com	Choose a shipping speed: <input checked="" type="radio"/> US Standard (7-14 business days) (\$6.95) <input type="radio"/> US Ground (3-7 business days) (\$9.95) <input type="radio"/> US 2Day (2 business days) (\$17.45) <input type="radio"/> US Next Day (1 business day) (\$27.45)

Item	Price/ea.	BV	Quantity	Total
<b>Advanced Formula Fat Fighter with Carb Inhibitors</b> SKU: 301	\$23.00	23.00	1	\$23.00
<b>Defining Gel</b> SKU: 214	\$45.00	40.00	1	\$45.00

Change Items

**Save your Auto-Shipment**

**Auto-Shipment Summary**

Subtotal \$68.00  
Estimated Shipping US Standard (7-14 business days) \$6.95  
Estimated Taxes \$3.48  
Estimated Total \$78.43  
BV Total 63

With this new functionality, you have total control over your auto-shipment orders (adding, canceling, changing dates, addresses and payment information).

## 2. Edit your existing Auto-Shipment(s)

Change your date, shipping address, billing address or cancel the auto-shipment.

Click on the **My Auto-Shipments** tab on the left menu bar. Under the monthly auto-shipment transactions listed, you have the option to **View**, **Edit** or **Cancel** the auto-shipment.

**My Auto-Shipments**

**Auto-Shipments**

Create New Auto-Shipment Manage e-Suite auto-shipment

**Monthly Auto-Shipments**

Description	Payment Method	Next Run Date	Total	BV	
Auto-Shipment #664953	Credit card ending in *****8920	10/21/2013	\$113.95	90	View Edit Cancel
Auto-Shipment #2340064	Credit card ending in *****8920	9/27/2013	\$67.36	54	View Edit Cancel
My Canada House	Credit card ending in *****8920	10/25/2013	\$73.78	54	View Edit Cancel
My Monthly Autoship	Credit card ending in *****8920	9/17/2013	\$72.71	54	View Edit Cancel







Click on **Edit** to view the current transaction. From this screen, you can edit your shipping and billing information, change your shipment date and/or change the items on your order. You can also choose to cancel your auto-shipment from this screen.

**Auto-Shipment Details**

**My Monthly Autoship**  
You will be billed for this Auto-Shipment monthly starting on Friday, August 23, 2013.  
[\(Change\)](#)

Shipping Information	Billing Information	Shipping Options
Shipping Address: <a href="#">(Change)</a>	Payment Method: <a href="#">(Change)</a>	Choose a shipping speed: <input type="radio"/> US Standard (7-14 business days) (\$6.95) <input checked="" type="radio"/> US Ground (3-7 business days) (\$9.95) <input type="radio"/> US 2Day (2 business days) (\$15.95) <input type="radio"/> US Next Day (1 business day) (\$25.95)

Item	Price/ea.	BV	Quantity	Total
 <b>Advanced Formula Fat Fighter with Carb Inhibitors</b> SKU: 301	\$23.00	23.00	1	\$23.00
 <b>Defining Gel</b> SKU: 214	\$45.00	40.00	1	\$45.00

[Change Items](#)

Save your Auto-Shipment

**Auto-Shipment Summary**

Subtotal \$68.00

Estimated Shipping  
US Ground (3-7 business days) \$9.95

Estimated Taxes \$4.43

Estimated Total \$82.38

BV Total 63

Cancel Auto-shipment

Once you complete your updates, click on **Save Your Auto-Shipment**.

**Auto-Shipment Details**

**My Monthly Autoship**  
You will be billed for this Auto-Shipment monthly starting on Friday, August 23, 2013.  
[\(Change\)](#)

Shipping Information	Billing Information	Shipping Options
Shipping Address: <a href="#">(Change)</a>	Payment Method: <a href="#">(Change)</a>	Choose a shipping speed: <input type="radio"/> US Standard (7-14 business days) (\$6.95) <input checked="" type="radio"/> US Ground (3-7 business days) (\$9.95)

Save your Auto-Shipment

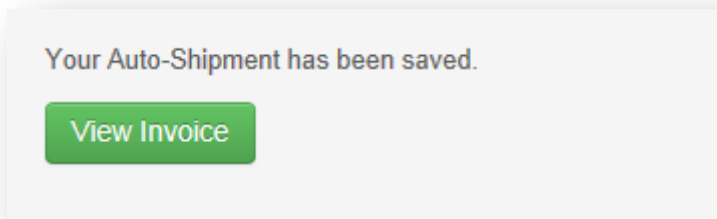
**Auto-Shipment Summary**

Subtotal \$68.00

Estimated Shipping  
US Ground (3-7 business days) \$9.95

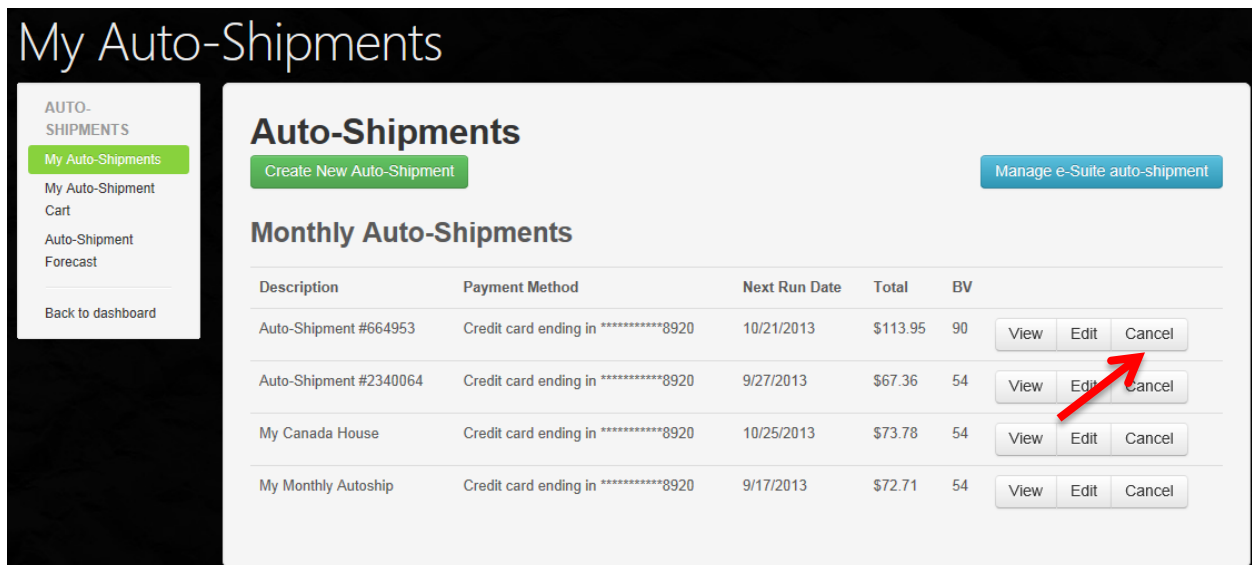


This will show that your auto-shipment has been saved and allow you to view the invoice for confirmation.



### 3. Cancel your Auto-Shipment(s)

Click on the **My Auto-Shipments** tab on the left-hand side bar. Select which auto-shipment order you want to cancel by clicking on **Cancel**.



## My Auto-Shipments

AUTO-SHIPMENTS

- My Auto-Shipments
- My Auto-Shipment Cart
- Auto-Shipment Forecast

Back to dashboard

### Auto-Shipments

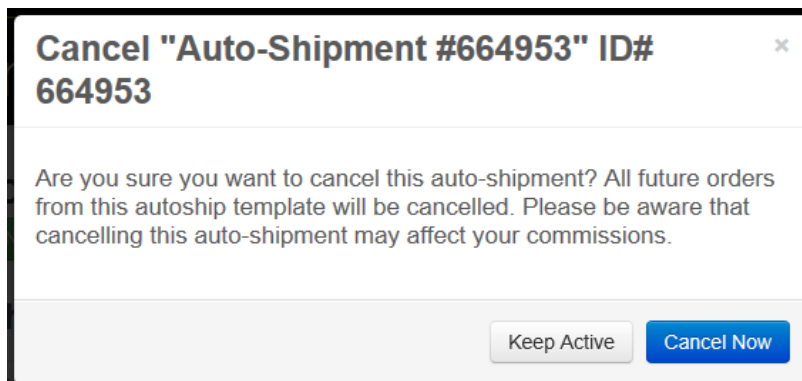
Create New Auto-Shipment

Manage e-Suite auto-shipment

#### Monthly Auto-Shipments

Description	Payment Method	Next Run Date	Total	BV	
Auto-Shipment #664953	Credit card ending in *****8920	10/21/2013	\$113.95	90	View Edit Cancel
Auto-Shipment #2340064	Credit card ending in *****8920	9/27/2013	\$67.36	54	View Edit Cancel
My Canada House	Credit card ending in *****8920	10/25/2013	\$73.78	54	View Edit Cancel
My Monthly Autoship	Credit card ending in *****8920	9/17/2013	\$72.71	54	View Edit Cancel

Once selected, you will be asked to confirm your cancellation.



### Cancel "Auto-Shipment #664953" ID# 664953

Are you sure you want to cancel this auto-shipment? All future orders from this autoship template will be cancelled. Please be aware that cancelling this auto-shipment may affect your commissions.

Keep Active Cancel Now



If you click on **Cancel Now**, the system will ask why you are cancelling.

## Cancel Auto-Shipment

- ID# 288

I agree that It Works! can cancel my auto-shipment order.

**Please tell us the reason you would like to cancel your auto-shipment.**

- Business is slow
- Completed 3 months
- Credit Card Problem (lost, stolen)
- Doesn't Want an Automatic Payment
- Doesn't want products any longer
- Duplicate/Secondary
- Enough PV
- Financial Reasons
- Health Reasons
- Moving
- Not doing business anymore
- Product Doesn't Work
- Reached Desired Results
- Too Expensive
- Too Much Product
- Unable to accept package
- Unhappy with company/DT
- Vacation
- Will not divulge reason
- Will order when they want to

Once **I agree, cancel my auto shipment** is selected, the system will display a confirmation number.

## My Auto-Shipments

AUTO-SHIPMENTS

- My Auto-Shipments
- My Auto-Shipment Cart
- Auto-Shipment Forecast

Back to dashboard

### Cancel Auto-Shipment

**Success**

Your cancellation number is: 21720130729141246. Each auto-shipment order must be cancelled individually. If you have additional auto-shipment orders that you wish to cancel, please complete this cancellation process for each order. Please be aware that your eSuite subscription is still active. This tool provides you with access to your personal website and allows you to manage your business online. If you wish to cancel your monthly eSuite subscription, please submit a new Support Ticket or contact Customer Service at 952-540-5700.

**Auto-shipment cancelled**

[Return to Auto-shipments](#)



#### 4. Manage eSuite Auto-Shipment

Click on the **Manage eSuite auto-shipment** button to view your current eSuite subscription.

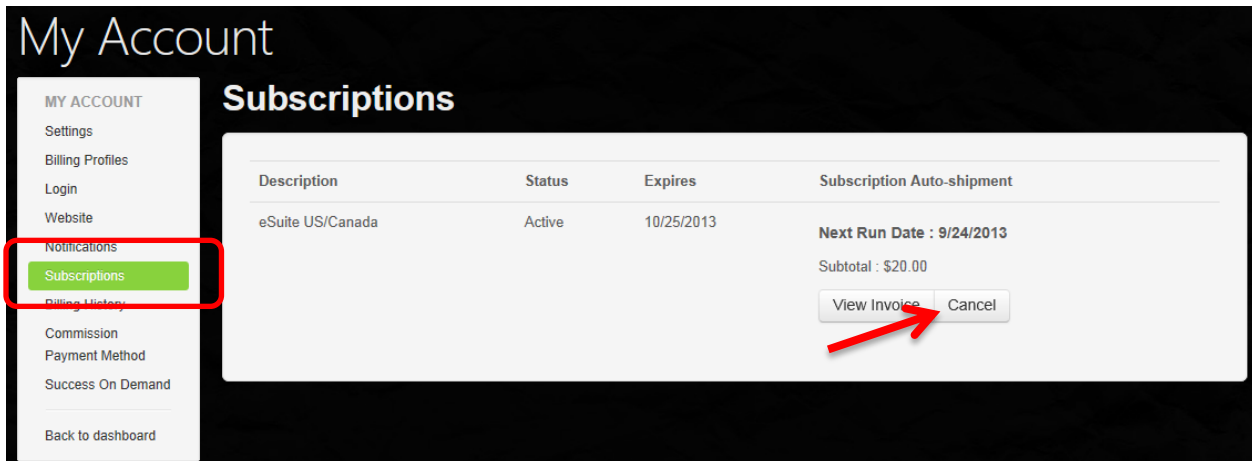


The screenshot shows the 'Auto-Shipments' section of a user interface. At the top left, there is a green button labeled 'Create New Auto-Shipment'. To the right, there is a blue button labeled 'Manage e-Suite auto-shipment', which is highlighted by a red arrow. Below this is the 'Monthly Auto-Shipments' section, which contains a table with the following data:

Description	Payment Method	Next Run Date	Total	BV	
Auto-Shipment #664953	Credit card ending in *****8920	10/21/2013	\$113.95	90	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Cancel"/>

This will take you to the settings area under **Subscriptions**. This will show your current eSuite subscription, next run date, current status and when it expires.

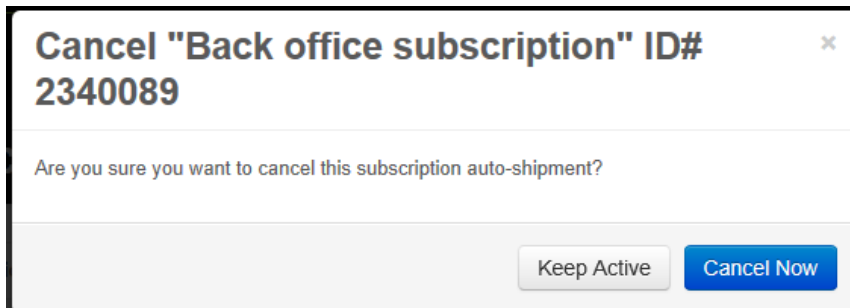
From here you can view your invoice or cancel your subscription. *If you cancel this subscription, you will no longer have access to eSuite* for managing your business. If you cancel then want to reactive it, you will have to contact Customer Service.



The screenshot shows the 'My Account' page with the 'Subscriptions' section active. On the left, a sidebar menu has 'Subscriptions' highlighted with a red box. The main content area shows the following subscription details:

Description	Status	Expires	Subscription Auto-shipment
eSuite US/Canada	Active	10/25/2013	<b>Next Run Date : 9/24/2013</b> Subtotal : \$20.00 <input type="button" value="View Invoice"/> <input type="button" value="Cancel"/>

If you select **Cancel**, the system will confirm that you want to cancel, ask why you are cancelling and then provide a confirmation.



The screenshot shows a confirmation dialog box with the following text:

**Cancel "Back office subscription" ID# 2340089**

Are you sure you want to cancel this subscription auto-shipment?



## 5. View your downline Auto-Shipment Forecast

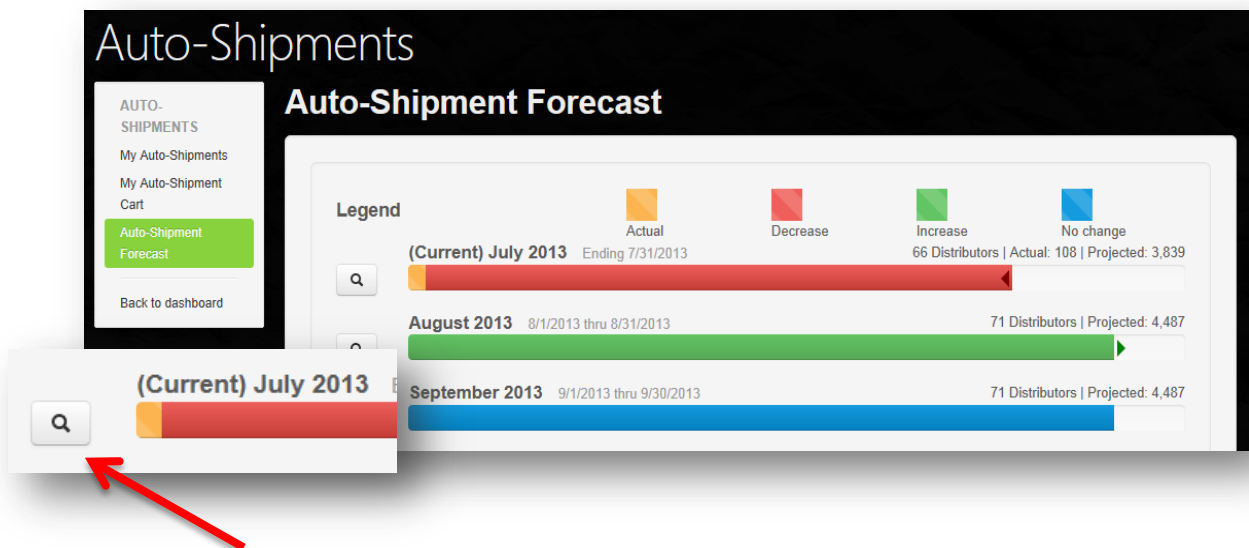
Click on the **Auto-Shipment Forecast** tab on the left-hand side bar. The system will display a total estimate by month of your downline auto-shipment orders with the ability to drill-down into each month.

Based on the previous month, if the monthly forecast is:

- Less than, the line will be RED
- Greater than, the line will be GREEN
- Equal to, the line will be BLUE

Actual shipments for the current month will be in ORANGE.

This chart should help you determine how much volume to expect from your downline each month based on what is currently set up in the system.



You can click on the zoom key (magnifying glass) on the left-hand side of each bar to see the details for that month.

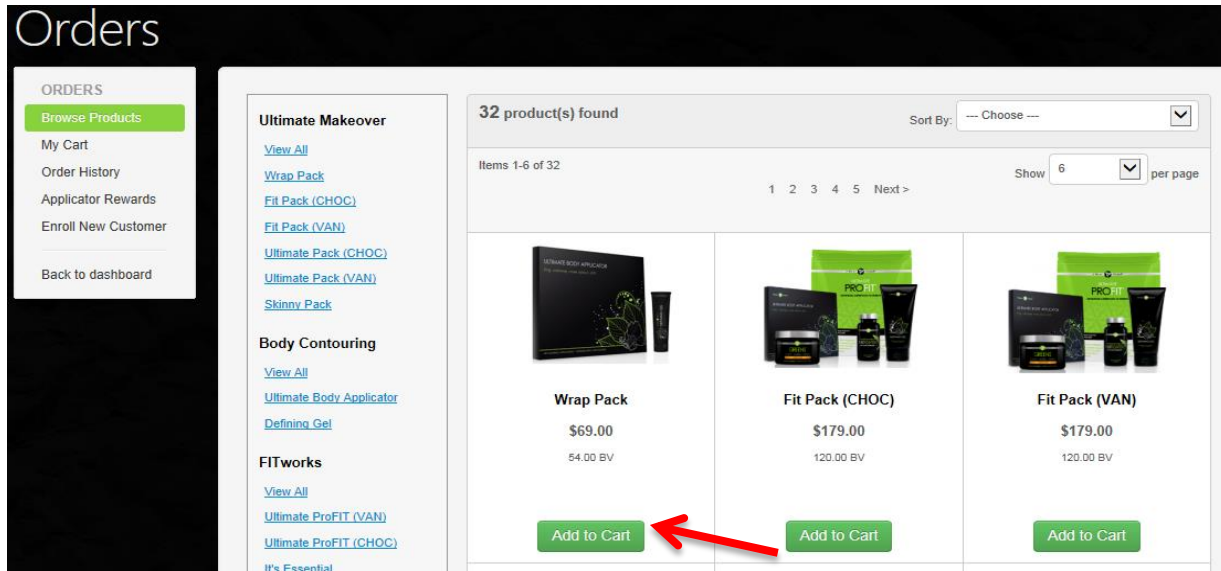
**Auto-Shipment Forecast Details - July 2013**

Distributor	Shipped	Volume	Ship Date
Amy LC Test Dup 1 ID# 885		54	7/8/2013
Amy LC Dup Test 2 ID# 888		54	7/8/2013



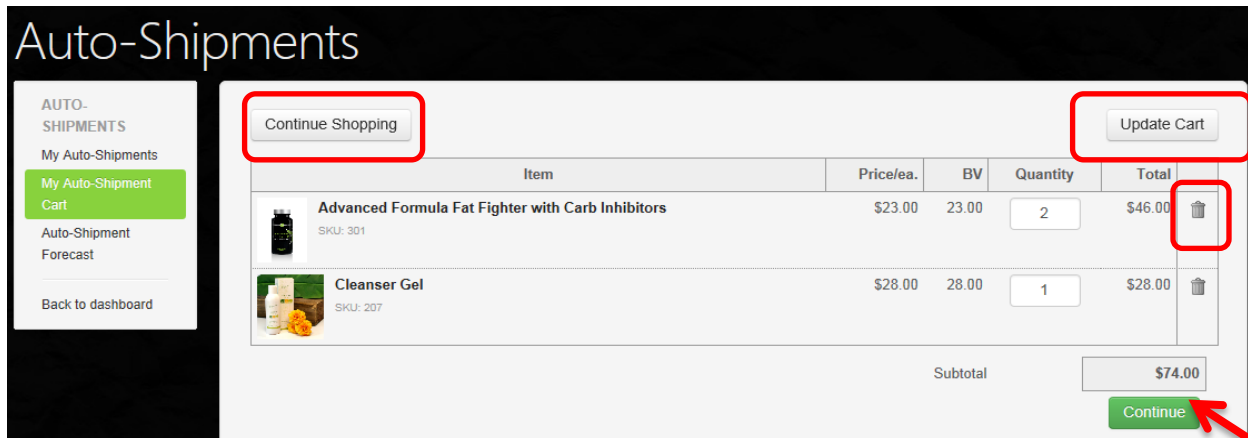
## C. Place an order

Select the Orders tab at the top of the screen to begin a new order.



The screenshot shows the 'Orders' section of a website. On the left is a navigation menu with options like 'Browse Products', 'My Cart', 'Order History', 'Applicator Rewards', 'Enroll New Customer', and 'Back to dashboard'. The main content area is titled 'Orders' and displays '32 product(s) found'. Below this, there are three product listings: 'Wrap Pack' (\$69.00, 54.00 BV), 'Fit Pack (CHOC)' (\$179.00, 120.00 BV), and 'Fit Pack (VAN)' (\$179.00, 120.00 BV). Each listing has an 'Add to Cart' button. A red arrow points to the 'Add to Cart' button for the 'Wrap Pack'.

Select the items you want to order by clicking on **Add to Cart**. This will display your shopping cart where you can continue shopping for additional items, change the quantity of the items selected or delete items.



The screenshot shows the 'Auto-Shipments' section of a website. On the left is a navigation menu with options like 'My Auto-Shipment Cart', 'Auto-Shipment Forecast', and 'Back to dashboard'. The main content area is titled 'Auto-Shipments' and displays a shopping cart. At the top, there are 'Continue Shopping' and 'Update Cart' buttons. The cart contains two items: 'Advanced Formula Fat Fighter with Carb Inhibitors' (SKU: 301) and 'Cleanser Gel' (SKU: 207). The 'Advanced Formula Fat Fighter' item has a quantity of 2 and a total of \$46.00. The 'Cleanser Gel' item has a quantity of 1 and a total of \$28.00. At the bottom, there is a 'Subtotal' of \$74.00 and a 'Continue' button. Red boxes highlight the 'Continue Shopping', 'Update Cart', and 'Continue' buttons, and a red arrow points to the 'Continue' button.

If your order is complete, click on **Checkout** and the system will ask for your shipping address. Once selected, you can review your order and make additional changes or select **Continue**.

The next screen will be for payment.



## Review your order



Shipping Information	Shipping Options
Shipping Address: <a href="#">(Change)</a> Kyle DT Main 5325 E State Road 64 Bradenton, FL 34208-5534 US  Phone: 6165551212 Email: kyledtmain@gmail.com	Choose a shipping speed: <input checked="" type="radio"/> Test (\$15.00)

[Continue](#)

### Order Summary

Subtotal	\$51.00
Shipping	\$15.00
Test	
Taxes	\$3.32
<b>Order Total</b>	<b>\$69.32</b>

### Today's Order

Item	Price/ea.	Quantity	Total
 <b>Advanced Formula Fat Fighter with Carb Inhibitors</b> SKU: 301	\$23.00	1	\$23.00
 <b>Cleanser Gel</b> SKU: 207	\$28.00	1	\$28.00

[Change Items](#)

You can choose to pay the order using an existing credit card on file or by setting up a new one. You can also choose to apply existing points/credits to your order.

### Payments Made: \$0.00

#### Choose your payment method:

[Credit Card](#)

Primary Card - Ending in \*\*\*\*\*8920

New Credit Card

[Point Account](#)

### Payments Made: \$0.00

#### Choose your payment method:

[Credit Card](#)

[Point Account](#)

Point Account: **\$120.00**

Description: **Perk Points**

Amount:  [Apply](#)

Since you have the option to use different accounts, you must enter the amount you want charged on each card or points account.



Enter the amount and click on **Apply**. It will show what payments were applied per account.

**Payments Made: \$205.36**

Credit Card *****1111	\$205.36
-----------------------	----------

Your order will be confirmed and you can view the invoice (if you want to print, use the windows print functionality).

## Orders

ORDERS

Browse Products

My Cart

Order History

Applicator Rewards

### Thank you for your order!

Your order has been placed.

[View Invoice](#)

Click on **View Invoice** to display the order details.

**ItWorks**

5325 State Road 64 East  
 Bradenton, Florida 34208  
 United States  
 (555)555-5555

# INVOICE

Date: July 29, 2013  
 Invoice #: 1344

---

**Ship To:** Kyle DT Main  
 5325 E State Road 64  
 Bradenton, FL 34208-5534, US

**Fulfillment Center:** Test  
 Dallas, TX 75247, US

Customer #	Source	Status	Ship Via	Shipped Date	Tracking
217	API Order	Accepted	Test	---	---

SKU	Description	Quantity	Unit Price	Unit BV	Unit CV	Line Total
301	Advanced Formula Fat Fighter with Carb Inhibitors	1	\$23.00	23.00	23.00	\$23.00

**Notes:**

Subtotal	\$23.00
Shipping & Handling	\$15.00
Tax	\$1.50
<b>GRAND TOTAL</b>	<b>\$39.50</b>
TOTAL PAID	\$39.50
TOTAL DUE	\$0.00

THANK YOU FOR YOUR BUSINESS!





## D. Move an order

Under the Orders section, select the **Order History** tab from the menu bar on the left-hand side.

This will display all orders placed by you or where you are the designated distributor on the order. If an order is eligible to move (based on current business rules), it will be highlighted in green.

You can see how many orders you can still move within the current month on the left-hand side of the screen.

The screenshot shows the 'Order History' interface. On the left, there is a sidebar with navigation options: 'ORDERS', 'Browse Products', 'My Cart', 'Order History' (highlighted), 'Applicator Rewards', and 'Back to dashboard'. Below this, it shows 'Max allotted moves: 5' and 'Max allotted BV: 1000'. Further down, under 'Order Moves', it states 'Number of order moves this period: 0' and 'BV total of the orders moved this period: 0'. The main area features a search bar with 'Order' selected, 'Equals' as the operator, and a search input field. There are 'Search' and 'Reset' buttons, and an 'Export to Excel' button. A checkbox for 'Orders in the past 24 hours' is present. The table below has columns for Order, Status, Type, Date, Total, BV, and Actions. Several rows are highlighted in green, indicating they are eligible to be moved. A callout box with a blue border and a blue arrow pointing to the 'API Order' type in the third row contains the text: 'API Order is an order placed from your eSuite'.

Order	Status	Type	Date	Total	BV	Actions
1344	Accepted	API Order	7/29/2013 1:47:06 PM	\$39.50	23	Actions
1342	Accepted	API Order	7/29/2013 1:46:27 PM	\$39.50	23	Actions
1341	Accepted	API Order	7/29/2013 1:43:05 PM	\$39.50	23	Actions
1340	Incomplete	API Order	7/29/2013 1:41:03 PM	\$69.32	51	Actions
1309	Accepted	API Order	7/24/2013 9:00:00 AM			Actions
1308	Incomplete	API Order	7/24/2013 9:00:00 AM			Actions
1294	Accepted	Customer Service	7/23/2013 10:44:59 AM	\$197.46	162	Actions
1281	CC Pending	Recurring Order	7/23/2013 1:00:00 AM	\$155.49	136	Actions

If an order is eligible to move, click on the **Actions** button and select **Move**.

This screenshot shows the same 'Order History' interface as above, but with the 'Actions' dropdown menu open for the first highlighted order (1344). The dropdown menu contains two options: 'Move' (with a plus icon) and 'No Tracking Available'. A red arrow points to the 'Move' option, indicating it is the correct action to take.

Order	Status	Type	Date	Total	BV	Actions
1344	Accepted	API Order	7/29/2013 1:47:06 PM	\$39.50	23	Actions
1342	Accepted	API Order	7/29/2013 1:46:27 PM	\$39.50	23	Actions
1341	Accepted	API Order	7/29/2013 1:43:05 PM	\$39.50	23	Actions



The system will confirm that you want to move this order.

### Move Order ID# 1344

Are you sure you want to move this order? This move can not be undone.

Select **Yes, Move the Order**. You will need to enter the name or the id of the distributor that you want to move the order to.

### Move Order

Order ID# 1344

Search for a distributor by entering their name or customer id.

Select the distributor you want and confirm the order move.

### Move Order

Order ID# 1344

Search for a distributor by entering their name or customer id.

Select a customer from the list below to move the order to:

Are you sure you want to move this order to Kyle DT Level 4 (7) - #277 - GV total 0 - ID# 277? This move can not be undone.

The system will confirm that the order has been moved.

### Move Order

Success

Order # 1344 has been moved to Account #277 - kyle dt level 4 (7) .

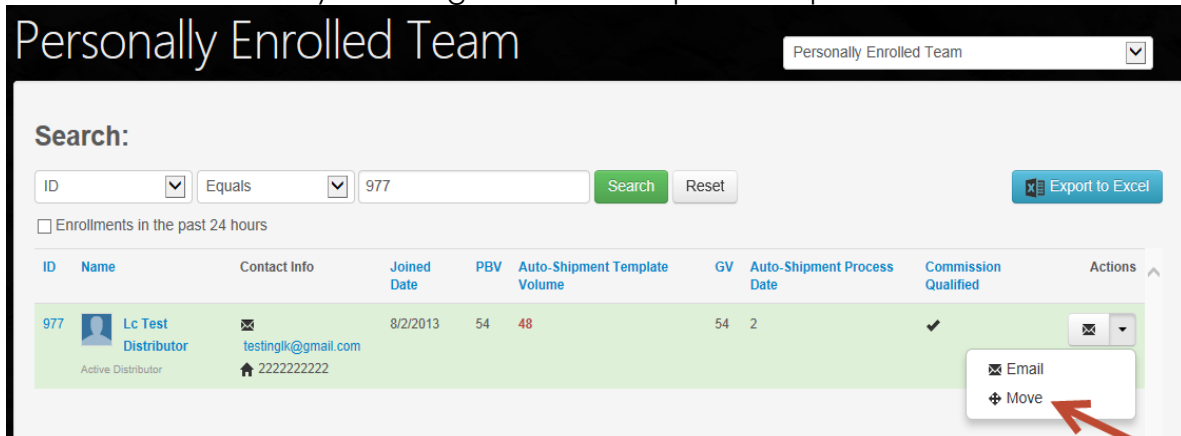
Order Moved



## E. Move Distributor Placement

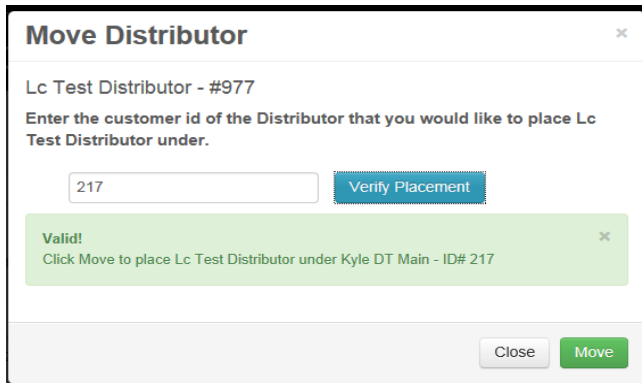
You can move a distributor or a loyal customer placement personally enrolled by you in your downline by going to the **Reports** section and running the report for your **Personally Enrolled Team**. If newly added distributors or loyal customers are eligible to move, they will be highlighted in green.

Move this distributor by selecting the **MOVE** drop down option from the action button.



The screenshot shows the 'Personally Enrolled Team' interface. At the top, there's a search bar with 'ID' selected, 'Equals' as the operator, and '977' as the search term. Below the search bar, there's a table of distributors. The first row is highlighted in green, indicating it's eligible for moving. The distributor is 'Lc Test Distributor' with ID 977. The 'Actions' column for this distributor has a dropdown menu open, showing 'Email' and 'Move' options. A red arrow points to the 'Move' option.

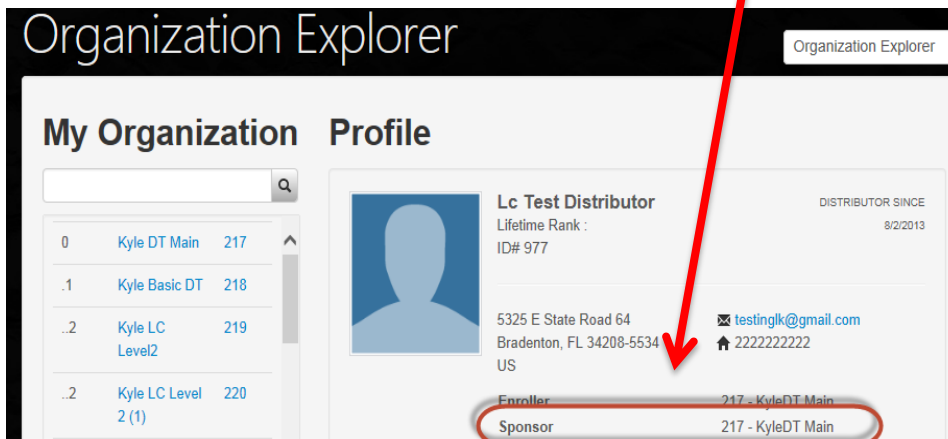
You will be prompted to enter and verify the distributor id that you want to move to. Once the new distributor is confirmed, select **Move**.



The 'Move Distributor' dialog box is shown. It contains the text 'Lc Test Distributor - #977' and 'Enter the customer id of the Distributor that you would like to place Lc Test Distributor under.' Below this, there's a text input field containing '217' and a 'Verify Placement' button. A green message box says 'Valid! Click Move to place Lc Test Distributor under Kyle DT Main - ID# 217'. At the bottom, there are 'Close' and 'Move' buttons.

Once moved, the system will notify you that the move was successful.

You can verify this by going to the new distributor's profile and confirming the listed Sponsor (same as placement)



The 'Organization Explorer' interface is shown. On the left, there's a 'My Organization' tree with 'Kyle DT Main' selected. The main area shows the profile of 'Lc Test Distributor'. The 'Sponsor' field is highlighted with a red circle and a red arrow pointing to it from the text above. The sponsor is '217 - KyleDT Main'.

## F. Redeem Applicator Rewards

Under the Orders section, select the **Applicator Rewards** tab from the menu bar on the left-hand side. The number of rewards you have available will be displayed with the option to select the number you want to redeem.

The screenshot shows the 'Applicator Rewards' interface. On the left is a navigation menu with 'Applicator Rewards' selected. The main area is divided into two steps: 'STEP 1 Choose your rewards' and 'STEP 2 Shipping'. In Step 1, there are two reward options: 'Ultimate Applicator Wrap Rewards' (1 point each) and 'Facial Applicator Wrap Rewards' (1 point each). Both have a quantity selector set to 0. A red arrow points to the 'Facial' option. To the right, a box labeled 'Your Applicator Rewards' shows a green '2'. In Step 2, the shipping address is '5325 E State Road 64, Bradenton, FL 34208-5534, US' and the shipping preference is 'US Standard (7-14 Business Days) (Free)'. A green 'Submit Order' button is at the bottom.

Once you select rewards to redeem, it will subtract the total from your balance.

This screenshot shows the 'Applicator Rewards' page after selection. The quantity for 'Ultimate Applicator Wrap Rewards' is now set to 2, and the quantity for 'Facial Applicator Wrap Rewards' remains at 0. The 'Your Applicator Rewards' box on the right now shows a green '0', indicating that the available balance has been updated.

You will be notified if you try to redeem more rewards than you currently have available.

This screenshot shows an error message at the top: 'Oops! You do not have enough points to cover your selected items. Please remove 2 item(s) before proceeding.' Below the message, the 'Applicator Rewards' page is shown with the 'Ultimate Applicator Wrap Rewards' quantity set to 2 and the 'Facial Applicator Wrap Rewards' quantity set to 0. The 'Your Applicator Rewards' box now shows a green '-2', indicating that the system has attempted to deduct more points than were available.



You then select your shipping address and preference and **Submit Order**.

STEP 2 Shipping

**Shipping Address**

SHIPPING ADDRESS

5325 E State Road 64, Bradenton, FL 34208-5534, US

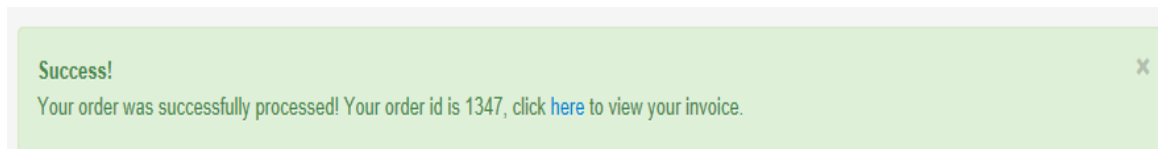
**Shipping Preference**

US Standard (7-14 Business Days) (Free)

US Standard (Free)

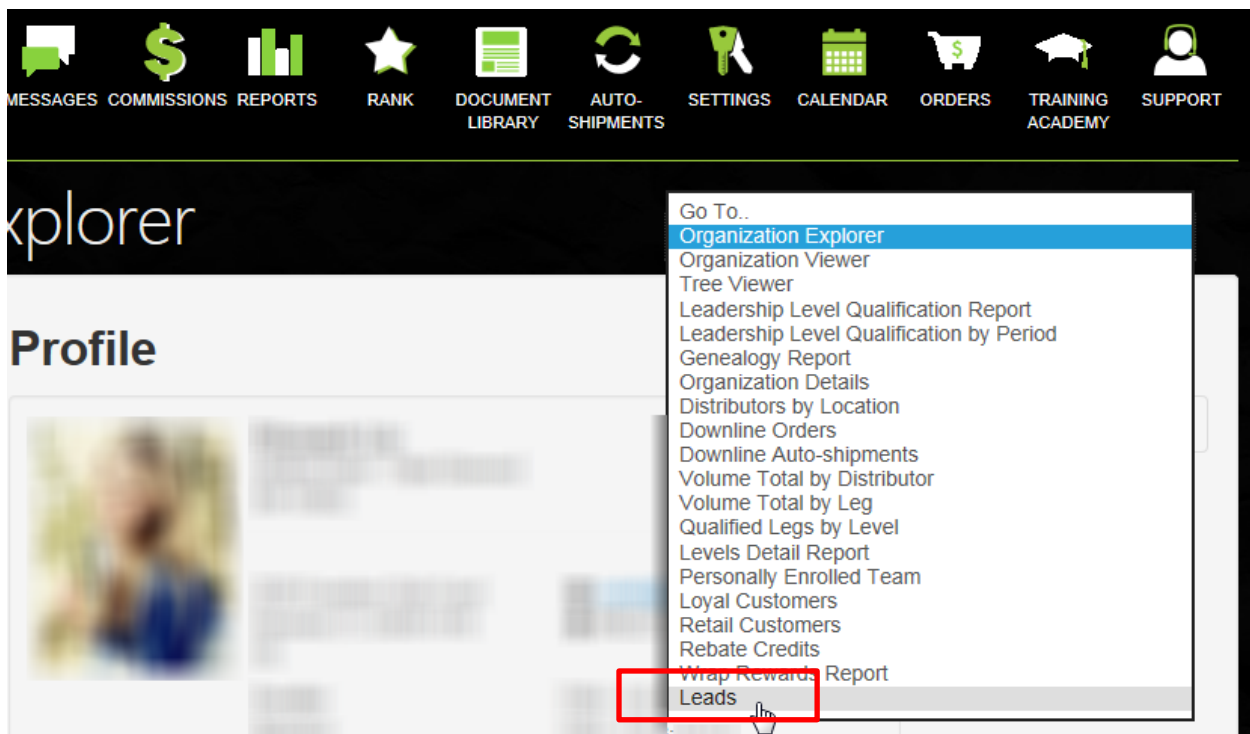
Submit Order

The system will confirm your order and provide a link for viewing the invoice.



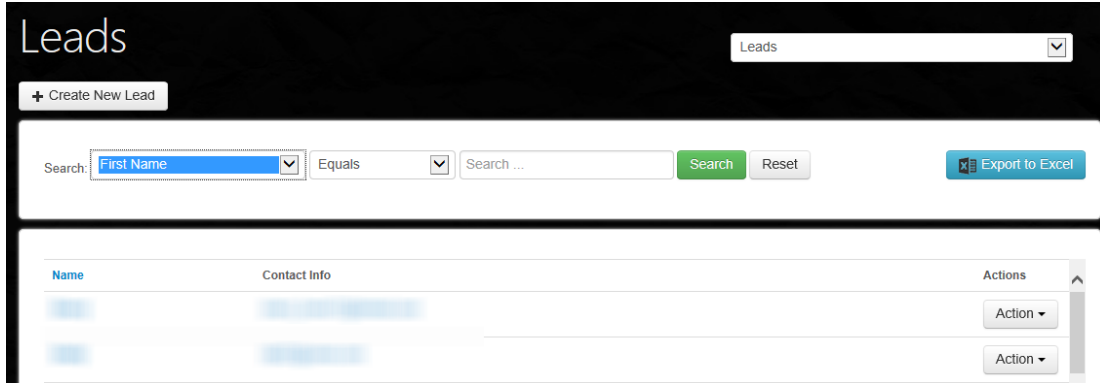
## G. Create a Customer Lead

To create a new customer lead (prospect), go to the Reports section and select the report **LEADS**



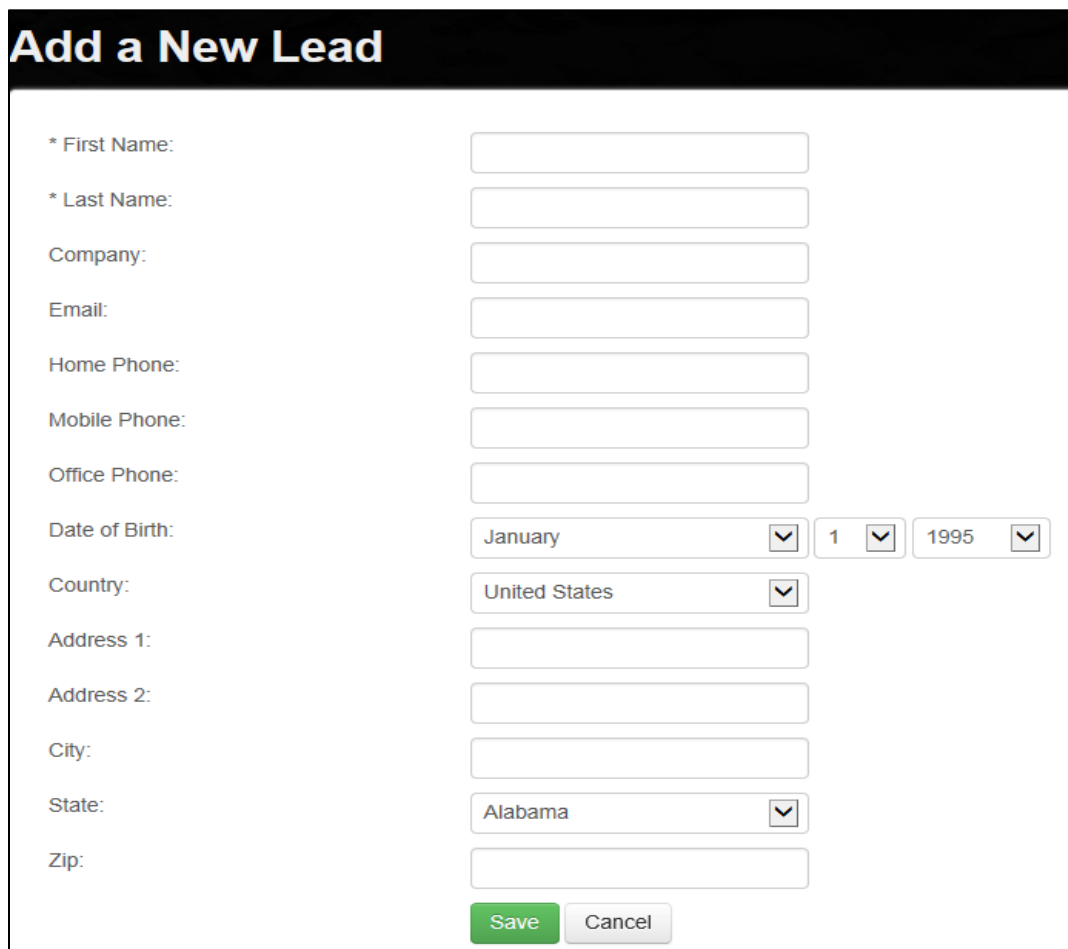
All your existing leads will be listed in the report with the ability to create a new lead or search for an existing name.

Click on **Create New Lead**



The screenshot shows a web interface for managing leads. At the top left, the word "Leads" is displayed in a large font. To its right is a dropdown menu currently set to "Leads". Below this, there is a button labeled "+ Create New Lead". A search bar is present with a dropdown menu set to "First Name", followed by an "Equals" dropdown, a "Search ..." text input, a green "Search" button, and a grey "Reset" button. To the right of the search bar is a blue button with an Excel icon labeled "Export to Excel". Below the search bar is a table with columns for "Name", "Contact Info", and "Actions". Two rows of data are visible, each with an "Action" dropdown menu.

On the data entry form, enter the information you need on that prospect and click **SAVE**.



The screenshot shows a form titled "Add a New Lead". The form contains the following fields and controls:

- \* First Name:
- \* Last Name:
- Company:
- Email:
- Home Phone:
- Mobile Phone:
- Office Phone:
- Date of Birth:
- Country:
- Address 1:
- Address 2:
- City:
- State:
- Zip:

At the bottom of the form are two buttons: a green "Save" button and a grey "Cancel" button.



The new prospect will be added in alphabetical order on the report. To edit an existing lead, select the **ACTION** button to the right of the name.

Leads

Leads

+ Create New Lead

Search: First Name Equals Search ... Search Reset Export to Excel

Name	Contact Info	Actions
		Action
		Action
		Action

This will reopen the data entry form so changes can be made.

### Edit - Ann-Test Thompson

\* First Name: Ann-Test

\* Last Name: Thompson

Company:

Email: annthompson@hotmail.com

Home Phone:

Mobile Phone:

Office Phone:

Date of Birth: January 1, 1983

Country: United States

Address 1: 12234 State Street

Address 2:

City: Bradenton

State: Florida

Zip: 34208

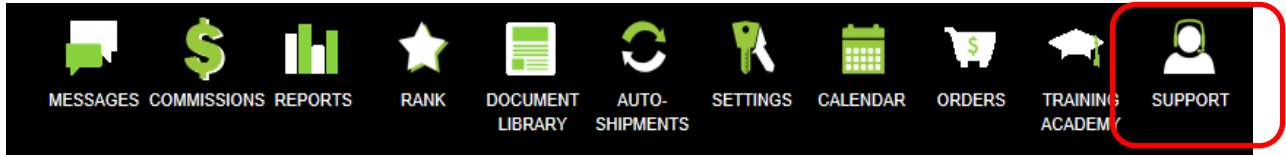
Save Cancel

Edit the data and click on **SAVE**.



## H. Create a Support Ticket

To create and manage your customer service support tickets, click on the **Support** tab.



The home page will list all your open tickets with the option to view closed tickets from a separate tab. The system will notify you if you have a high priority ticket to view. Any tickets that have recent activity i.e. a new comment, will be highlighted with BOLD text.

My Account

SUPPORT

- Account Home
- Support
- Create new ticket

Welcome [Name]

### Support Tickets

Create New Ticket

Attention You have a new high priority ticket response. Please read it immediately.

Open Tickets Closed Tickets

Ticket#	Subject	Updated	Status
8080019	order Move	Saturday, August 31, 2013	New
8080006	New Ticket Create	Friday, August 30, 2013	New
8080003	<b>Important</b> Well Done	Friday, August 30, 2013	New

To create a new ticket, click on **Create New Ticket** from the create new ticket button in the upper right corner or from the left menu selection.

The ticket entry screen will allow you to select a category / sub-category to better define your request. You can also enter an Order ID if the ticket is related to a specific order.

From -- select category first --

Category **Compensation**

Sub Category

Order ID

Sub Category **Applicator Rewards**

Order ID

Subject

- Autoship
- Compliance
- eSuite
- Information Change
- Month End
- Orders
- Shipping
- Smiles/Suggestions

- Bonuses
- Diamond Bonuses
- Fast Start Bonuses
- Monthly Commissions
- Product Credit
- Promotions
- MyItWorksPay / Payoneer





When submitting a ticket request, provide as much detail as possible so that the customer service rep can correctly address your need.

Enter your information and click on **Create Ticket** to complete your request.

## Create Ticket

Get top notch support using our ticket system. Help us better serve you by assigning your ticket to the appropriate category and describing your issue including specific details. If the issue is related to a specific order, you can enter the order # in the OrderID field.

**Category**

**From**

**Category** -- select category first --

**Sub Category** -- select category first --

**Order ID**

**Details**

**Subject**

**Message**

Once you create the ticket, the information will display for your review.

## Issue with Bonus

Ticket ID# 8080022

Assigned To

Last Updated Saturday, August 31, 2013

Priority **Standard**

---

Comments - [Add New Reply](#)

**Issue/Bonus**

Saturday, August 31, 2013 - 1 second ago.

Have a question ...see details...



When you return to the home page, the new ticket will display.

Ticket#	Subject	Updated	Status
8080022	Issue with Bonus	Saturday, August 31, 2013	New
8080019	order Move	Saturday, August 31, 2013	New

Click on a ticket to add new comments and information as needed.

← Back to tickets

**Issue with Bonus**

Ticket ID# 8080022  
Assigned To  
Last Updated Saturday, August 31, 2013  
Priority **Standard**

Comments - [Add New Reply](#)

Comments - [Add New Reply](#)

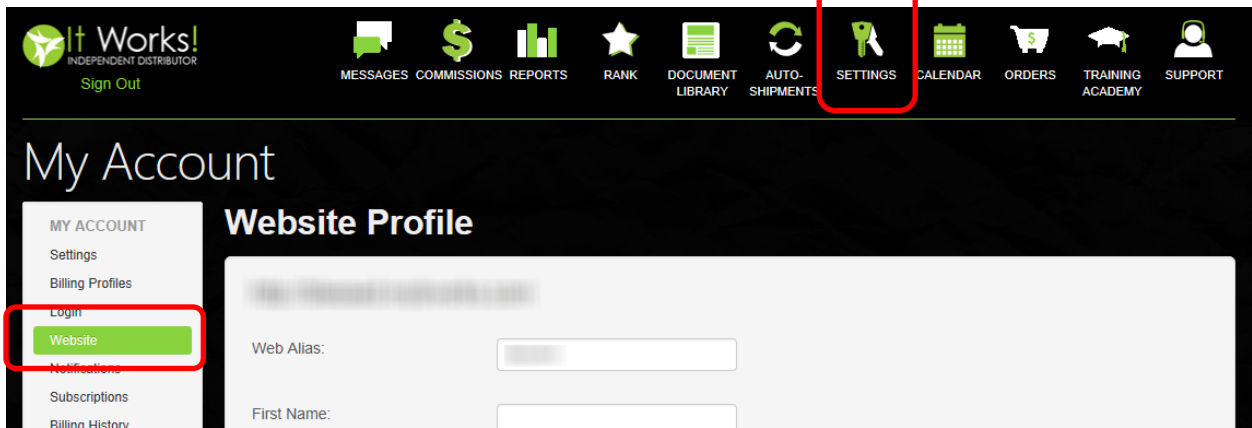
Submit

Any replies from a customer service rep will display in a conversational format for easier viewing and tracking.

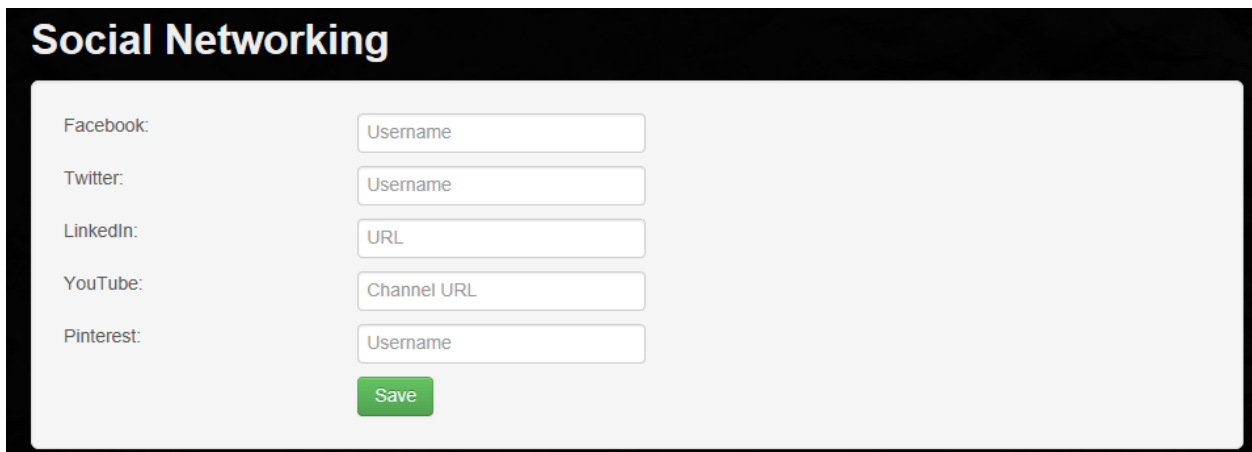
## I. Adding Social Media Links

Under **Settings**, then **Website**, enter the social media links that you want to display on your replicated website.





At the bottom of the screen, enter the social media links.



NOTE: Some of these links require you to enter the full URL as shown below.

