Conklin Business Portal FAQ

DASHBOARD

The Conklin Business Portal Dashboard shows various information regarding the health and viability of your business, with three filter options described below. Toggling through the filter options will update all on-screen data to reflect the summarized data in the selected filter. Managers can quickly view new Wholesale Customers and Distributors sponsored in the current calendar month and year-to-date, as well as maintain volume for the current cycle and current rolling 12 cycles – with both compared against the same time period in the previous year.

Your scorecard shows the health of your account and, if applicable, management level performance. The number of Distributors represents the total number of operational (active or inactive) accounts in your organization (based on the filter). The scorecard also shows your current cycle maintain and commission volume, as well as the number of days left in the current cycle.

Personal

Focusing on your personal account, this view shows your personal orders and volume for the current cycle and the current rolling 12 cycles. The main dashboard widget shows your most recent ten (10) orders, shipments, and volume transactions – each of which is clickable for more detail.
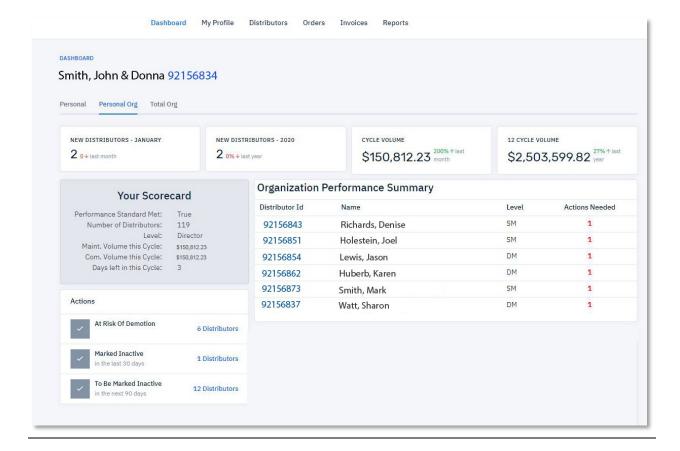
Personal Org (default)

The actions widget allows users to quickly see Managers in your personal organization who are at risk of demotion (not meeting their management level performance requirements), Distributors who have been marked inactive in the past 30 days, and accounts that will be marked inactive within the next 90 days without an order. Clicking on any of these actions will take you to a list of the Distributors or customers who require action, allowing you to target your management efforts.

The Organization Performance Summary widget shows a list of Managers in your personal organization who are at risk of demotion (not meeting their management level performance requirements), allowing you to click on their name to quickly see what activity must occur for those individuals to remain at their current management level.

The Top 10 Personal Volume shows the largest personal purchasers in your personal organization. The widget allows you to change filters based on various time frames, top performers for recognition or bottom performers for encouragement, and allows you to select manager levels to view personal purchases of your Managers (not their organizational volume) to ensure your Managers are leveraging the Conklin opportunity.

Total Org

The Total Org filter is substantially the same as the Personal Org filter (above), except that all values reflect your Total Organization (personal organization plus three development generations). This allows Managers to oversee and drive their development organizations with as much vigor as their personal organization.

DASHBOARD

Smith, John & Donna 92156834

Personal | **Personal Org** | Total Org

NEW DISTRIBUTORS - JANUARY	NEW DISTRIBUTORS - 2020	CYCLE VOLUME	12 CYCLE VOLUME
2 0↓ last month	2 0% ↓ last year	$150,812.23 200%↑ last month	$2,503,599.82 27%↑ last year

Your Scorecard

Performance Standard Met:	True
Number of Distributors:	119
Level:	Director
Maint. Volume this Cycle:	$150,812.23
Com. Volume this Cycle:	$150,812.23
Days left in this Cycle:	3

Actions

✓	At Risk Of Demotion	6 Distributors
✓	Marked Inactive in the last 30 days	1 Distributors
✓	To Be Marked Inactive in the next 90 days	12 Distributors

Organization Performance Summary

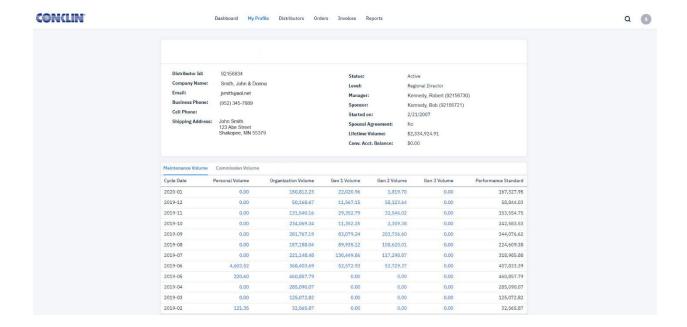| Distributor Id	Name	Level	Actions Needed
92156843	Richards, Denise	SM	1
92156851	Holestein, Joel	SM	1
92156854	Lewis, Jason	DM	1
92156862	Huberb, Karen	DM	1
92156873	Smith, Mark	SM	1
92156837	Watt, Sharon	DM	1

MY PROFILE

This view is the default for any Conklin account selected, showing the account number, name, contact, and other pertinent information including the convenience account balance.
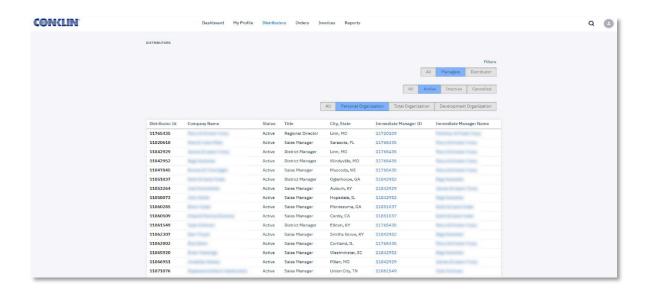
The balance of the page displays the customer or Distributor's 12-cycle volume information. Personal volume represents the personal purchases of the individual selected. Organizational Volume represents the account's personal organization volume (including foam), with up to three generations shown as well. Filters are available to allow you to view various other time periods or volume levels, as well as moving from cycle to monthly time periods. Note the commission volume tab as well, which shows the commission volume in each generation. Clicking on any volume amount takes you to the orders page, which is pre-filtered to show the orders which comprise that volume amount, allowing you to track payment application and volume activity.

The My Profile page also includes a tree view of the account's personal and total organizations (up to three generations). Each name is clickable to allow the Manager to view contact and other information for simplified organization management.

Distributor Id:	92156834			Status:	Active
Company Name:	Smith, John & Donna			Level:	Regional Director
Email:	jsmith@aol.net			Manager:	Kennedy, Robert (92156730)
Business Phone:	(952) 345-7689			Sponsor:	Kennedy, Bob (92156721)
Cell Phone:				Started on:	2/21/2007
Shipping Address:	John Smith 123 Abe Street Shakopee, MN 55379			Spousal Agreement:	No
				Lifetime Volume:	$2,334,924.91
				Conv. Acct. Balance:	$0.00

Maintenance Volume   Commission Volume

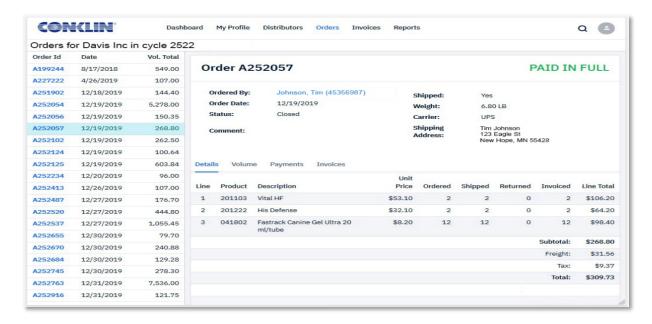| Cycle Date	Personal Volume	Organization Volume	Gen 1 Volume	Gen 2 Volume	Gen 3 Volume	Performance Standard
2020-01	0.00	150,812.23	22,020.96	1,819.70	0.00	167,327.95
2019-12	0.00	50,168.67	11,567.15	58,123.64	0.00	58,844.03
2019-11	0.00	131,540.16	29,352.79	32,546.02	0.00	153,554.75
2019-10	0.00	234,069.34	11,352.25	2,309.38	0.00	242,583.53
2019-09	0.00	281,767.19	83,079.24	203,736.60	0.00	344,076.62
2019-08	0.00	157,158.04	89,935.12	108,620.01	0.00	224,609.38
2019-07	0.00	221,148.48	130,449.86	117,298.87	0.00	318,985.88
2019-06	4,603.52	368,403.69	52,572.93	53,729.37	0.00	407,833.39
2019-05	220.60	460,857.79	0.00	0.00	0.00	460,857.79
2019-04	0.00	285,090.07	0.00	0.00	0.00	285,090.07
2019-03	0.00	125,072.82	0.00	0.00	0.00	125,072.82
2019-02	121.35	32,565.87	0.00	0.00	0.00	32,565.87

DISTRIBUTORS

This tab provides a list of Distributors in your organization. The view defaults to active Managers in your personal organization, but these filters allow you to easily search all, Managers, or Distributors (including cancelled individuals). The Title, City/State, and Immediate Manager information allows you to quickly find the correct individual.

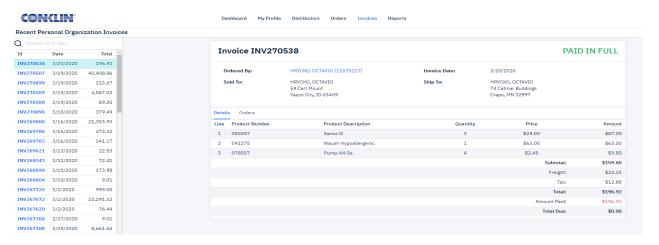| Distributor Id	Company Name	Status	Title	City, State	Immediate Manager ID	Immediate Manager Name
11765435		Active	Regional Director	Linn, MO	11720109	
11820610		Active	Sales Manager	Sarasota, FL	11765435	
11842929		Active	District Manager	Linn, MO	11765435	
11842952		Active	District Manager	Windyville, MO	11765435	
11847845		Active	Sales Manager	Muscoda, WI	11765435	
11851037		Active	District Manager	Oglethorpe, GA	11842952	
11853264		Active	Sales Manager	Auburn, KY	11842929	
11858073		Active	Sales Manager	Hopedale, IL	11842952	
11860285		Active	Sales Manager	Montezuma, GA	11851037	
11860509		Active	Sales Manager	Canby, CA	11851037	
11861549		Active	District Manager	Elkton, KY	11765435	
11862307		Active	Sales Manager	Smiths Grove, KY	11842952	
11862802		Active	Sales Manager	Cortland, IL	11765435	
11865920		Active	Sales Manager	Westminster, SC	11842952	
11866951		Active	Sales Manager	Milan, MO	11842929	
11871076		Active	Sales Manager	Union City, TN	11861549	

ORDERS

The Orders tab shows the last 100 orders placed within your personal organization. You can also search by order number, allowing you to quickly find the order information.

Once an order is selected, the customer and shipping information is shown in the header, as well as the order lines and pricing detail. Various tabs show the volume application, payments against the order, and invoices – all neatly organized for your records.
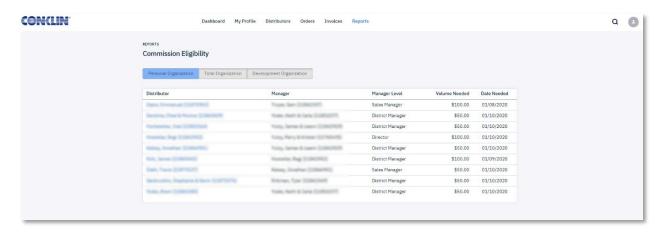

INVOICES

The Invoices tab shows the last 100 invoices (shipments) within your personal organization. You can also search by invoice number or date, allowing you to quickly find the invoice information. Once an invoice is selected, the customer and shipping information is shown in the header, as well as the invoice lines and pricing detail. The Orders tabs show associated orders to view order-related information – all neatly organized for your records.
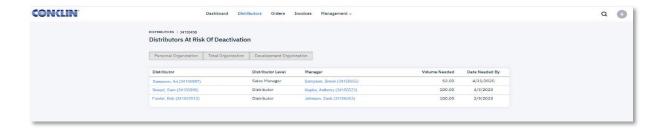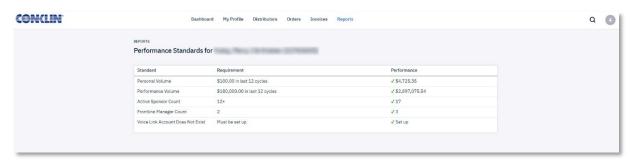
REPORTS

Commission Eligibility - This report provides a list of Managers who are not currently meeting the commission eligibility requirements, as well as the amount they need to order to be commission eligible for the current cycle. Note the filter for various organizational views.

Distributors at Risk of Deactivation - View accounts at risk of being deactivated within the next 90 calendar days. This gives the day they need to place an order by and how much volume they need to maintain their active status. Note the filter for various organizational views.

Performance Standards - View detailed requirements to maintain your current management position. Any deficiencies will be noted with the required corrective action (subject to change prior to cycle-end).

Total Organization Performance - View the Managers in your entire organization in one spot – this report shows all Managers in your entire organization and the performance requirements for them to maintain their current management level. Deficiencies are highlighted in red for easy review and action. Clicking on any name will take you to the customer's My Profile screen, while the Details link will show you the customer's detailed performance requirements, with any deficiencies noted with the required corrective action (subject to change prior to cycle-end).

Distributor Id	Name	Level	Personal Volume	Performance Volume	Active Sponsors	Frontline Managers	Voice Link	Link to Detail
		SM	$14,053	$9,788	1	0	✓	Details
		DR	$64,551	$245,071	13	0	✓	Details
		DR	$3,422	$99,769	17	1	✓	Details
		DR	$8,088	$1,260,574	14	1	✓	Details
		DM	$216,123	$73,555	5	3	✓	Details
		DM	$2,447	$472,149	5	5	✓	Details
		DM	$1,752	$21,075	6	1	✓	Details
		DR	$159,730	$418,724	21	1	✓	Details
		DM	$632	$1,128	2	0	✓	Details
		DM	$53,606	$33,369	5	3	✓	Details
		DR	$5,423	$7,758,418	11	2	✓	Details

Note: All volume amounts reported are current as of the close of the previous business day and are subject to change without notice based on daily activity in customer accounts.