

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 My Profile Distributors Orders Invoices Reports

DASHBOARD

Smith, John & Donna 92156834

Personal Personal Org Total Org

NEW DISTRIBUTORS - JANUARY

2 0 ↓ last month

NEW DISTRIBUTORS - 2020

2 0% ↓ last year

CYCLE VOLUME

\$150,812.23 200% ↑ last month

12 CYCLE VOLUME

\$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

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

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

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) 345-7889	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	167,327.96
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.

CONCLIN Dashboard My Profile **Distributors** Orders Invoices Reports

DISTRIBUTORS

Filters

All Managers Distributor

All Active Inactive Cancelled

All Personal Organization Total Organization Development Organization

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	Windysville, MO	11765435	
11847945		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.

CONKLIN Dashboard My Profile Distributors **Orders** Invoices Reports

Orders for Davis Inc in cycle 2522

Order Id	Date	Vol. Total
A199244	8/17/2018	549.00
A227222	4/26/2019	107.00
A251902	12/18/2019	144.40
A252054	12/19/2019	5,278.00
A252056	12/19/2019	150.35
A252057	12/19/2019	268.80
A252102	12/19/2019	262.50
A252124	12/19/2019	100.64
A252125	12/19/2019	603.84
A252234	12/20/2019	96.00
A252413	12/26/2019	107.00
A252487	12/27/2019	176.70
A252520	12/27/2019	444.80
A252537	12/27/2019	1,055.45
A252655	12/30/2019	79.70
A252670	12/30/2019	240.88
A252684	12/30/2019	129.28
A252745	12/30/2019	278.30
A252763	12/31/2019	7,536.00
A252916	12/31/2019	121.75

Order A252057 PAID IN FULL

Ordered By: Johnson, Tim (45356987) **Shipped:** Yes
Order Date: 12/19/2019 **Weight:** 6.80 LB
Status: Closed **Carrier:** UPS
Comment: **Shipping Address:** Tim Johnson, 123 Eagle St, New Hope, MN 55428

Details Volume Payments Invoices

Line	Product	Description	Unit Price	Ordered	Shipped	Returned	Invoiced	Line Total
1	201103	Vital HF	\$53.10	2	2	0	2	\$106.20
2	201222	His Defense	\$32.10	2	2	0	2	\$64.20
3	041802	Fastrack Canine Gel Ultra 20 m/tube	\$8.20	12	12	0	12	\$98.40
Subtotal:								\$268.80
Freight:								\$31.56
Tax:								\$9.37
Total:								\$309.73

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.

CONKLIN Dashboard My Profile Distributors Orders **Invoices** Reports

Recent Personal Organization Invoices

Id	Date	Total
INV270538	3/20/2020	196.92
INV270507	3/19/2020	40,408.86
INV270499	3/19/2020	213.67
INV270389	3/19/2020	4,567.03
INV270380	3/19/2020	89.25
INV270098	3/18/2020	379.49
INV269800	3/16/2020	21,353.93
INV269786	3/16/2020	472.42
INV269782	3/16/2020	141.17
INV269621	3/13/2020	22.53
INV269243	3/12/2020	72.41
INV268890	3/10/2020	173.98
INV268804	3/10/2020	9.01
INV267725	3/2/2020	999.00
INV267672	3/2/2020	22,291.32
INV267620	3/2/2020	76.44
INV267368	2/27/2020	9.01
INV267108	2/25/2020	8,661.65

Invoice INV270538 PAID IN FULL

Ordered By: HRYCKO, OCTAVIO (11875127) **Invoice Date:** 3/20/2020
Sold To: HRYCKO, OCTAVIO, 59 Cart Mount, Yazoo City, ID 63409 **Ship To:** HRYCKO, OCTAVIO, 74 Catmar Buildings, Crapo, MN 55428

Details Orders

Line	Product Number	Product Description	Quantity	Price	Amount
1	050357	Sanox II	3	\$29.00	\$87.00
2	041275	Wauash Hypoallergenic	1	\$63.00	\$63.00
3	078557	Pump-64 Oz.	4	\$2.45	\$9.80
Subtotal:					\$159.80
Freight:					\$24.24
Tax:					\$12.88
Total:					\$196.92
Amount Paid:					\$196.92
Total Due:					\$0.00

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.

Distributor	Manager	Manager Level	Volume Needed	Date Needed
Tracy, Steven (22862962)	Tracy, Sam (22862967)	Sales Manager	\$100.00	01/08/2020
Benford, Chad & Renee (22862968)	Tracy, Sam & Renee (22862967)	District Manager	\$50.00	01/10/2020
Wheeler, Tom (22862969)	Tracy, Sam & Renee (22862967)	District Manager	\$50.00	01/10/2020
Wheeler, Reg (22862970)	Tracy, Sam & Renee (22862967)	Director	\$100.00	01/10/2020
Wheeler, Jonathan (22862971)	Tracy, Sam & Renee (22862967)	District Manager	\$50.00	01/10/2020
Wheeler, James (22862972)	Wheeler, Reg (22862970)	District Manager	\$100.00	01/09/2020
Wheeler, Tracy (22862973)	Wheeler, Jonathan (22862971)	Sales Manager	\$50.00	01/10/2020
Wheeler, Jonathan & Renee (22862974)	Wheeler, Tom (22862969)	District Manager	\$50.00	01/10/2020
Tracy, Sam (22862967)	Tracy, Sam & Renee (22862967)	District Manager	\$50.00	01/10/2020

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.

Distributor	Distributor Level	Manager	Volume Needed	Date Needed By
Sampson, Ad (34156987)	Sales Manager	Sampson, Brook (34156995)	52.00	4/11/2020
Shaw, Sam (34156996)	Distributor	Kojka, Anthony (34156623)	100.00	4/3/2020
Fowler, Deb (341567812)	Distributor	Johnson, Zack (34156453)	100.00	2/9/2020

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).

Standard	Requirement	Performance
Personal Volume	\$100.00 in last 12 cycles	✓ \$4,725.35
Performance Volume	\$1,600,000.00 in last 12 cycles	✓ \$2,897,075.54
Active Sponsor Count	12+	✓ 17
Frontline Manager Count	2	✓ 3
Voice Link Account Does Not Exist	Must be set up	✓ Set up

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
	John [Redacted]	SM	\$14,053	\$9,788	1	0	✓	Details
	John [Redacted]	DR	\$64,551	\$245,071	13	0	✓	Details
	John [Redacted]	DR	\$3,422	\$99,769	17	1	✓	Details
	John [Redacted]	DR	\$8,088	\$1,260,574	14	1	✓	Details
	John [Redacted]	DM	\$216,123	\$73,555	5	3	✓	Details
	John [Redacted]	DM	\$2,447	\$472,149	5	5	✓	Details
	John [Redacted]	DM	\$1,752	\$21,075	6	1	✓	Details
	John [Redacted]	DR	\$159,730	\$418,724	21	1	✓	Details
	John [Redacted]	DM	\$632	\$1,128	2	0	✓	Details
	John [Redacted]	DM	\$53,606	\$33,369	5	3	✓	Details
	John [Redacted]	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.