BACK OFFICE GUIDE

Welcome to your back office guide. The home page features 9 of the most frequently used reports. These reports can also be located under the "Personal Reports" and "Team Reports" section.

HOME PAGE REPORTS

Watch Back Office Training
With Cindi Kelly:
https://vimeo.com/565818815

"UNILEVEL TEAM"
Also located under "Team Reports".

This report is the most comprehensive report to view your organization. This is a go-to report that you should use daily to see all recent and past activity in your downline. Almost all aspects of your business can be managed from this report. Sorting the data in different ways can help you and your team achieve significant growth.

TIPS

-There are 2 ways to sort data. If you click on the title at the top of a column, you can sort any column, highest to lowest, or lowest to highest by clicking it again. Once you click another column and sort, it will not hold the previous sort.

-If you click the filter inside the circle (and choose one of the choices from the dropdown) you can sort the data and hold that information. You can sort multiple columns at once.

-You can move the order of columns by clicking the name of the column and dragging it. Use this if you want to see certain data next to other data. This will not save once you close the report.

-Click on "previous period" and see the organization the prior month, and so on.

Frequently used columns:

LEVEL
Level 1 is your direct enrollee (unless they were placed under another sponsor). Level 2 is a direct enrollee of someone on your level 1, and so on. You can choose to sort by level. If you put "equal to 1" then this report will show only your level 1. This is helpful in identifying the volume in each "leg", which is significant when you are qualifying at diamond and above (example provided under GV). Note- this follows the sponsor/placement tree, not the enrollment tree.

ID
Click the ID number to see activity, volumes, orders, back up orders, rank advancements, and upline of each member in your organization.

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TREE
By clicking the tree of someone on your team, you will now be looking only at the people that are in that person's organization. Use this to see your downline team member's organization through their eyes. You can then help manage their business, just like you manage your own.

PV
Personal volume that month. This can be used to make sure everyone has placed their order and that no one on your team is in jeopardy of losing a commission.

CUSTOMER $
Sort by customer volume, highest to lowest and see who on your team has the highest in customer sales for the month.

-Example- if you see your BP has $900 in customer sales, they are only $100 away from achieving the $1k club. You can use this report to help identify and motivate others that may not have known what was needed to achieve the next K club.

GV
The GV column shows the total group volume for a brand partner. Click GV twice (the word, not the filter/circle). This will sort highest to lowest.

*Example using *LEVEL and GV-* Sort your level using the example above (equal to 1). Then click GV twice. Since you are looking only at your level 1, you will now see your volume in each "leg" because you are sorting who in your organization has the highest volume and only looking at your level 1. This is very helpful when you are trying to figure out structure requirements (which begin at the diamond rank) and balance in your organization. Please consult the compensation plan or your mentor to learn more detail on structure.

This sorting method can be used with any data. Once you exit the report, your sorting is gone.

AE
Active enrolled - 50 or more PV, from your personally enrolled. Each rank in the compensation plan requires a minimum AE.

-Note- This may or may not be your level 1. If you placed a personally enrolled under a different sponsor they are still your personally enrolled but no longer your level 1.

START DATE
This is a way to sort your organization and see who has entered most recently. Note: If someone began as a customer and then upgraded to partner, this column will only show the original date when the customer first created their account.

UPGRADE DATE
This column shows the date that your customer upgraded their account to brand partner. The fast start window begins when they upgrade.

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LAST ORDER DATE
Click twice and you will get the most recent orders at the top of the report. Very quick and easy way to see the current activity that day. You can use this to congratulate your team for enrolling new partners/customers or even to welcome the new partner/customer yourself!

+/- MTD VOLUME
Manage your progression from the previous month. To manage your business effectively, you want to stay connected to your growth percentage. Green numbers are positive. Red are in decline. You can also sort this column to see who in your team is leading the way with the highest green numbers.

SMART ORDER BV
Easy way to see the smart order on file for all partners and customers. If a partner does not have a smart order they will not be eligible for most company promotions.

UBT ENROLEES and UBT PROMO GQV.
The enrollee column shows the number of qualified UBT enrollees MTD (qualifying pack and smart order apply). UBT GQV will show the QV from promotions during that month. GQV stand for *GROUP QUALIFYING VOLUME*. Qualifying volume is not commissionable volume but counts towards your rank in the compensation plan. This volume can help you unlock many areas of the comp plan. Use these 2 columns to help your team take advantage of the Widen Your Reach and UBT promo.

RANK/RANK ID/PAID RANK/PAID RANK ID
Rank is the highest title rank. Paid rank is the current rank that month. Note- Your brand partner will have the rank “member” next to them until they have their own PV that month. Paid rank resets monthly. The rank and paid rank ID are there for sorting purposes. Each rank has a numeric code. Because the title ranks are not alphabetical, we use the code to sort ranks in a logical order.

HIGHEST K CLUB
This data is there so you can see when a partner achieves a new k club rank for the first time. We always want to congratulate new milestone achievements. Shout out to wins like this in your team business page.

“FULL GROUP VOLUME”
Also located under “Team Reports”.

This is a great report to manage the growth in your organization on a percentage basis.

This is an easy report to use. Sort “*THIS MTD GV”* to see the total group volume, month to date, highest to lowest. Then look at the “*MTD DIFFERENCE”* and “*% DIFFERENCE”* columns. This will show you how much each person is up and what the % growth is. The “*LAST MTD GV”* column will show you the total GV at the current point in the previous month, for comparison. It is not possible to rank up in title every month. But measuring growth month after month will lead to new ranks. Celebrate the growth- not only the ranks. Steady consistent growth- regardless of pace- is a huge win.

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At the top of the report you will see *INCREASE IN GV*, *DECREASE IN GV* and *NO CHANGE IN GV*. That is how you can see the combined efforts of your team.

"RANK ADVANCEMENT"
Also located under Personal Reports.

This is a simple report identifying what you need to achieve the next rank. This has nothing to do with your highest rank achieved, only what is needed during the current month.

The first line will show you if you qualify for lifestyle/pool bonus at your current paid as rank. This applies to diamonds and above.

The next section shows you the % to the next rank and the requirements for the next rank. You can change the rank and look at what is needed for all upcoming ranks. It will then show you the % to that goal and also the requirements.

"ALL BRAND PARTNERS"
Also located under "Team Reports".

This report isolates only those that have a brand partner account in your organization. This is a simple report that can be sorted by date to see the day they joined as a partner. Your newest partners will be at the top of the list.

"ALL CUSTOMERS"
Also located under "Team Reports".

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"ALL RANKS ACHIEVED"
Also located under "Team Reports".

This report shows real time ranks achieved by partners with the newest ranks on top. A brand partner might appear more than once on this report if they have achieved more than one rank in the compensation plan.

"GOOGLE SHEETS"
View the live links to the current promotions and stay connected to important company news.
-Purium Releases and Updates
-Virtual Events and Calendar
-Social Posts and Calendar

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-Business Success Stories
-Leslie Zann Training Playbook
-Purium Rank Achievers
-Policies and Procedures

“COMMISSIONS”
Also located under “Personal Reports”.

This report shows your current commission, all previous commissions and breakdown of the commission.

The first thing you will see is the current week but if you click the arrow pointing down you will see the option to select all previous commissions. You will also see a pie chart breakdown that corresponds to the chosen week/month. Scroll down for details. If you click the arrow next to each component you can actually see a detailed breakdown, including the name of every customer paid during that period.

Action: Use this to understand your compensation and connect with your upline diamond/crown/mentor if further explanation is needed.

“UPCOMING RANK ADVANCEMENT”
Also located under “Team Reports”.

This report shows the upcoming rank advancements for the entire team.

Sort by *“Next Rank ID”*, highest to lowest, and you will see that highest paid-as ranks on top. From here you can click the name and see what is needed to achieve the next paid-as rank. By sorting the % complete column you can see who is closest on a % basis to the next paid-as rank.

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PERSONAL REPORTS

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“VOLUMES”
This report shows monthly totals and dates back to your first month as a brand partner. You can see the rank you qualified at, volume (8 and 9 level), PGV, and AE.

Action: Use this to see the trends in your business. Easy way to manage growth and to see a year at a glance. Compare growth not only month to month, but season to season, and year to year.

“**LOYAL CUSTOMERS**”
This report makes it easy to see all your personal customers at a quick glance. Sort by “*LAST ORDER DATE*” to see your most recent customer orders. This report is great for isolating your personal clients and their contact info in one simple list. Keep connected to your customers, new and old. Customers that feel appreciated and valued are more likely to be repeat clients, and could potentially be a great referral source or even a future partner. You can also sort the “*CUSTOMER $*” column to see the dollars your personal customers have spent in the current month.

TEAM REPORTS

"UNILEVEL TEAM"
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“PERSONALLY ENROLLED TEAM”
This report is the go to report to view information based on the enroller tree- not the placement of the partner. The Unilevel GV column appears next to the Enroller Tree GV column. This will allow you to compare the total GV under someone by enrolled vs placement.

There are a lot of options to sort by (similar to the unilevel report). Sort by *LEVEL* and choose equal to 1, then sort by *ENROLLER TREE GV.* This will show you how much volume is brought in under each person you enrolled- not by the “leg” which the unilevel would show- that follows the placement tree.

“UBT PROMO”
This report can be used to view all promotional volume- UBT enrollees by week and by month, itemized by brand partner. Tip: If you are not seeing your BP, make sure both the enroller and enrollee have a qualified smart order on file of at least 50bv.

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UBT PROMO GQV
Total qualifying points awarded during the calendar month, itemized by brand partner.

SMART ORDER BV
Smart order BV must be over 50 to qualify for UBT promotions.

"CONSULTANT FAST START"
This report is to help you manage your newest partners. All partners that have joined your organization in the last 30 days will appear. Note: This report does not include new customers.

Note: Numbers on this report may be different from the numbers you see in your unilevel report. The consultant fast start window is a 10 day window, beginning the day after enrollment/ upgrade. At times that could time period could be in 2 different calendar months.

FAST START PV
This is the personal volume of your new partner. PV can be used toward the 1000 GV required in order to achieve the fast start consultant rank. This report shows the PV within the brand partner's Consultant Fast Start window (10 days after enrollment).

FAST START GV
This is the total group volume that your new partner has within their Consultant Fast Start window.

AE
An active enrolled is defined as either a brand partner or a customer with a minimum of 50PV. This column shows the total active during your 10 day window. Must be at least 2 AE in order to qualify for the consultant/fast start consultant rank.

SMART ORDER BV
In order to qualify for any of the FAST START bonus incentives, you must have a 50bv or more smart order on file. Use this column to make sure no one misses out on bonuses by not having the correct S.O. on file.

START DATE/UPGRADE DATE
This is the date they became a partner- not the date they first ordered as a customer.

CONSULTANT FAST START EXPIRATION

This is the last day to achieve their FAST START bonus. Must have 1000gv, 50pv and 2 AE by this date. Sort this column so you can monitor by date those nearing the end of their window and help them achieve their first FAST START goal.

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“NEW BRAND PARTNER 90 DAY RUN”

This report shows all brand partners that have enrolled in your organization within the past 90 days. The most recent enrollments will appear at the top.

Want to help your team achieve FAST START? Sort by *START DATE/UPGRADE DATE* and easily identify who is in their first, second or third month. You can then help them achieve the ranks within their FAST START window!

The RANK column will show you the highest rank they achieved so you know what rank is next. The SMART ORDER BV column will show you the smart order on file. This is very important because a 50bv minimum smart order must be on file to qualify for any of the FAST START bonuses.

“ALL BRAND PARTNERS”
This report isolates only those that have a brand partner account in your organization. This is a simple report that can be sorted by date to see the day they joined as a partner. Your newest partners will be at the top of the list.

“ALL CUSTOMERS”
This report isolates only those that have a customer account in your organization. This is a simple report that can be sorted by date to see the day they joined as a customer. Your newest customers will be at the top of the list.

“ALL RANKS ACHIEVED”
This report shows real time ranks achieved by partners with the newest ranks on top. A brand partner might appear more than once on this report if they have achieved more than one rank in the compensation plan. Every new rank is a big deal, and should be celebrated. And be sure and check the enroller name column and congratulate them for helping their partner win. This is a team sport. Celebrate ranks achieved in your team Facebook page. Recognition is vital.

“UPCOMING RANK ADVANCEMENTS ”
This report shows the upcoming rank advancements for the entire team.

Sort by *“Next Rank ID” ,* highest to lowest, and you will see that highest paid-as ranks on top. From here you can click the name and see what is needed to achieve the next paid-as rank. By sorting the % complete column you can see who is closest on a % basis to the next paid-as rank.

“RECENT ACTIVITY LIST”
This is a combination of new brand partners and new rank advancements. Customers are not included and it does not show any other achievements.

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“TREE VIEWER”
This report is used to place your personally enrolled under a different sponsor. You can not place customers and can not place brand partners unless they are personally enrolled by you. Placements are not allowed during the first week of a calendar month and placements can only occur within a limited window after enrollment. When you “place” under a different sponsor there are some advantages, and some disadvantages. Please consult your up line mentor/ diamond/crown before doing a placement because these are not reversible.

“**DOWNLINE CHARTS**”
VOLUME BY PERIOD
5 month graphic history GV

DOWNLINE BY TYPE
Pie chart and number of each customer/partner type

DOWNLINE BY RANK
Pie chart of each brand partner by rank (title rank). Below is a the number in each position. By clicking a rank name and “go!”, a report will load with the rank of each person holding that title rank.

SIGNUPS PER MONTH
This shows the number of brand partner signups per month with a 5 month look back. This shows both group and personal numbers.

“DOWNLINE RANKS”
This report shows the number of people you have at each title rank in your organization.

“DOWNLINE ORDERS, LAST 14 DAYS”
This report shows ALL orders in the last 14 days. Brand partners, customers, new and old. Most recent orders begin at the top. You can always sort by *DATE* to see the most recent orders. Sort by *TOTAL* to see the amount spent. Once you see who is shopping, reach out and thank them! You can sort by level and see your personally enrolled (customers and partners) and you can see down through your organization. If you appreciate their business, let them know!

DOWNLINE’S SMART ORDERS
Sort by BV to see the total BV of their order. Sort by TOTAL to see the dollar amount of their order.   Smart order is the way to manage the health of your residual income.

“RANK ADVANCEMENT BY MONTH”

Shows the rank advancement by month. Use this to see who achieved a new rank in your organization. Important to shout out all new ranks in your team Facebook page and recognize this achievement. Note- the current month is not available on this report and the previous month will only show once the monthly commission report has been closed.

"DOWNLINE ENROLLMENTS"

This report is used to track enrollment behavior. *THIS MONTH MTD* shows the enrollments for the current month (enrollments = brand partner) for each person in your organization. The column *LAST MONTH MTD* shows the previous month enrollments, itemized by partner, through the current day. The *DIFFERENCE* column is a great tool to see who has increased their enrollments and who has decreased from the previous month. Green is a gain, red is a loss.

At the top of the report you will see *INCREASE IN ENROLLMENTS*, *DECREASE IN ENROLLMENTS* and *NO CHANGE IN ENROLLMENTS*. That is how you can see the combined efforts of your team.

"FULL GROUP VOLUME"

This is a great report to manage the growth in your organization on a percentage basis.

This is an easy report to use. Sort "*THIS GV MTD"* to see the total group volume, month to date, highest to lowest. Then look at the "*MTD DIFFERENCE"* and "*% DIFFERENCE"* columns. This will show you how much each person is up and what the % growth is. The "*LAST GV MTD"* column will show you the total GV at the current point in the previous month, for comparison. It is not possible to rank up in title every month. But measuring growth month after month will lead to new ranks. Celebrate the growth- not only the ranks. Steady consistent growth- regardless of pace- is a huge win.

At the top of the report you will see *INCREASE IN GV*, *DECREASE IN GV* and *NO CHANGE IN GV*. That is how you can see the combined efforts of your team.

"RETURNS"

This report shows you all returns in your organization over the last 6 months. Sort by *DATE* to see your most recent returns. Click the *ID* column and then choose the ID number listed. Then click up line to identify what brand partner is the level above the returned order. Sometimes returns can be prevented with proper coaching. Reach out to the sponsor/partner and make sure they know their customer returned a product and offer support to minimize future returns, if possible.