

## Steps to follow-up with 2+2+2 Customers

1. On your home page, you'll see a link for 2+2+2 Customers:

The screenshot shows the JordanEssentials dashboard. The top navigation bar includes links for Dashboard, Party, Alerts, Showcase, Messages, Autoship, New Order, Orders, Organization, and Commissions. The main content area is divided into several sections:

- JordanEssentials** profile information: Consultant ID: 1, Career Title: Essential Consultant, Paid as Title: Star 1 Consultant.
- Summary statistics: 24 New enrollments, 17 New customers, 6 New orders.
- News you can use: March Specials Announced, Important Updates Overview, Friday, February 26 News, Monday, February 22 News.
- Quick Links: Manage My Autoship, JE University, My Personal Jordan Site.
- 2+2+2 Customers**: A link highlighted with a red box.
- Search Distributors and Customers: A search bar.
- Personally Sponsored: A table listing sponsored customers.

Name	Career Title	AutoShip	Autoship Date
Essentials, Jordan (1398)	AD	No	
Harris, Shayla (841816)	EC	No	
Cahillo, Sandra (843541)	EC	No	
Raulston, Kevin (849555)	EC	No	
Slate, Kerri (853243)	EC	No	

2. When you click on that link, you'll be taken to a page where all of your Customer Groups are listed, including your 2+2+2 Groups:

The screenshot shows the Customer Groups page. The top navigation bar is the same as the dashboard. The main content area includes a search bar and a table of customer groups.

**Customer Groups**

Groups	Members	
Inactive Autoship	4648	<input type="checkbox"/>
Customers	1749	<input type="checkbox"/>
Have not Hosted	1749	<input type="checkbox"/>
Have never Ordered	1515	<input type="checkbox"/>
2+2+2: Customers who ordered 2 months ago	6	<input type="checkbox"/>
2+2+2: Customers who ordered 2 weeks ago	1	<input type="checkbox"/>
2+2+2: Customers who ordered 2 days ago	0	<input type="checkbox"/>
Have Hosted	0	

40 items per page | 1 - 8 of 8 Items

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- You can either use the checkbox on the right to send an email message to the entire group, or you can click on the group name to proceed to individual connections.
- After clicking on the name for any group, you'll be provided with a full listing of all Customers who fall within that group:

2+2+2: Customers who ordered 2 months ago

Search: Full Name

SEARCH SEND MESSAGE TO GROUP

Name ↑	Enrollment Date	
Deana Tranberg	2/6/2021	<input type="checkbox"/>
Jacki Lee	1/28/2021	<input type="checkbox"/>
Jane Perry	2/5/2021	<input type="checkbox"/>
Jessica Johns	1/15/2021	<input type="checkbox"/>
Nevada Young	1/15/2021	<input type="checkbox"/>
Tawnie H. Solpietro	7/3/2020	<input type="checkbox"/>

40 Items per page 1 - 6 of 6 items

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- Click on the name of the individual you're ready to connect with, and you'll be taken to the Contact Page for that person. On this contact page, you'll see the order history, including the order(s) from 2 Days/Weeks/Months ago:

2+2+2: Customers who ordered 2 months ago

Search: Full Name

SEARCH

Name ↑
Deana Tranberg
Jacki Lee
Jane Perry
Jessica Johns
Nevada Young
Tawnie H. Solpietro

40

SEND MESSAGE

Deana Tranberg

Billing Address

Customer: #863779

Shipping Address

Customer Type: Regular

Edit Profile

dlowe55temp@gmail.com

Fax: NOUPDATE

Mobile Phone: 6088640421

ACTIVITY TIMELINE

Date	Description
2/6/2021	Deana Tranberg signed up as a new Customer #863779
2/6/2021	Order #19607962 Placed

Displaying Items 1 - 2 of 2

NEW ORDER VIEW MORE ORDERS

Communication History

Date	Description
No records to display.	

Displaying Items 0 - 0 of 0

SEND MESSAGE

6. Click on the order to see exactly what was ordered:

The screenshot shows the 'Order Detail - 10607682' page. At the top, there is a navigation bar with icons for Dashboard, Party, Alerts, Showcase, Messages, Autoship, New Order, Orders, Organization, and Commissions. The main content area includes a 'PRINT' button and a summary section with the following details:

<b>Ship To</b> Deana Tranberg 648 E Olson St Blair, WI 54616 USA	<b>Bill To</b> Deana Tranberg 648 E Olson St Blair, WI 54616 USA 6088640421	<b>Ordered By:</b> Deana Tranberg <b>Order Date:</b> 2/6/2021 <b>Status:</b> Shipped <b>Shipping:</b> Jordan Essentials Shipping	<b>Sub Total:</b> (\$5.50) <b>Volume Total:</b> 15.00 <b>Shipping Total:</b> \$5.50 <b>Tax Total:</b> \$0.00 <b>Grand Total:</b> \$0.00
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Below the summary is a payment table:

Payment Date	Payment Type	Amount
2/6/2021	Unknown	\$26.90

The order items section displays two identical items:

- Lotion Bar - Oatmeal Milk & Honey (11009)**  
Price: \$10.00  
Volume: 7.50  
Quantity: 1  
Total Volume: 7.50  
Total: \$10.00
- Lotion Bar - Oatmeal Milk & Honey (11009)**  
Price: \$10.00  
Volume: 7.50  
Quantity: 1  
Total Volume: 7.50  
Total: \$10.00

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7. On the Order Detail Page, click on the Customer's name to view their mobile number (if they provided it at checkout). If you are working on your computer, you can now use that mobile number to send a text/call. If you are working on your phone, you can simply click on the phone number to text/call.

The screenshot shows the customer profile for 'Deana Tranberg (#863779)'. The profile is categorized as 'Regular' and includes contact information:

- Fax:** NOUPDATE
- Mobile Phone:** (608) 864-0421 (highlighted with a red box)
- Email:** dlowe85trem@gmail.com

Navigation options include Billing, Shipping, and Notepad. The right side of the page shows a summary of the order, including the 'Ordered By' field which is also highlighted with a red box and contains the name 'Deana Tranberg'. The summary details are:

<b>Ordered By:</b> Deana Tranberg	<b>Sub Total:</b> (\$5.50)
<b>Order Date:</b> 2/6/2021	<b>Volume Total:</b> 15.00
<b>Status:</b> Shipped	<b>Shipping Total:</b> \$5.50
<b>Shipping:</b> Jordan Essentials Shipping	<b>Tax Total:</b> \$0.00
	<b>Grand Total:</b> \$0.00

Below the summary is a table with one item:

Amount
\$26.90

The order items section displays one item:

- Lotion Bar - Oatmeal Milk & Honey (11009)**  
Price: \$10.00  
Volume: 7.50  
Quantity: 1  
Total Volume: 7.50  
Total: \$10.00

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8. After you've connected with this Customer, return to the Customer Group to move on to the next Customer. This can be done by either:
  - a. Clicking the back button 2x (you'll first go to the Customer's Profile page, then back to the Group page)
  - b. Using the top navigation: Under ORGANIZATION>CUSTOMER GROUPS

The screenshot shows the Jordan Essentials software interface. At the top, there is a navigation bar with icons for Dashboard, Party, Alerts, Showcase, Messages, Autoship, New Order, Orders, Organization, and Commissions. The main header area displays "2+2+2: Customers who ordered 2 months ago". Below this is a search bar with a "Full Name" dropdown and a "SEARCH" button. A table lists customer information:

	Name ↑	Enrollment Date	
	Deana Tranberg	2/6/2021	
	Jacki Lee	1/28/2021	
	Jane Perry	2/5/2021	
	Jessica Johns	1/15/2021	
	Nevada Young	1/15/2021	
	Tawnie H. Solpietro	7/3/2020	

At the bottom of the table, there is a pagination control showing "40 items per page" and "1 - 6 of 6 items". A dropdown menu is open on the right side of the screen, with "Customer Groups" highlighted in red. Other options in the menu include Summary, Enroll New, Downline Groups, Customer Management, Downline Report, Graphical Downline, Tree View Downline, Personally Enrolled, and Advanced Genealogy Report. A "PAGE TO GROUP" button is also visible.

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