

NCSS - Guthy Renker (Media) - [Contact History]

File Client Contact Operations Window Help

Primary Acct#: 269-997-177
 Customer Status: Active Jan 09, 2009
 Current as of: Jan 09, 2009
JACKLYN SMITH
 140 CHIMNEY ROCK DR
 VACAVILLE, CA 95687
 Telephone: (000) 000-0000

Total Balance: 0.00
 Donor/Donee: Ship To or Donee Exists
 Previous as of:

Tax Status: Taxed Total Paid: 27.81

SITE: NEO CSR: AGENT NAME
DATE: Feb 09, 2009 TIME: 10:09 pm
CONTACT REASON: PROACTIV SOLUTION
CONTACT COMMENT:
 CLMS NR RECIEVED
ACTIONS/RESPONSES/SUMMARY KEYS:
 CLMS NRCV: RPL = Y;801175 001;801183 001;801191 001;

SITE: NEO CSR: AGENT NAME
DATE: Jan 14, 2009 TIME: 06:15 pm
CONTACT REASON: PA TEST
CONTACT COMMENT:
 CCI- TOLD KIT WAS A 60D SUPPLY GOT A 30D SENT ANOTHER 30D SUPPLY FREE
ACTIONS/RESPONSES/SUMMARY KEYS:
 ORDER ENTRY: TOTAL ORDER = \$0.00

SITE: NEO CSR: JESSICA THURBER
DATE: Jan 11, 2009 TIME: 10:18 am
CONTACT REASON: PA TEST
CONTACT COMMENT:
 CCI CXL SHIPMENTS TOO OFTEN SAVE W INT CHNG
ACTIONS/RESPONSES/SUMMARY KEYS:

More Search Help

Scroll Up and Down the Customer Inquiry. v6.1.37 3/1/2009 5:57 PM

On January 14, our agent promised to send a compensation 30 day set to this customer. She used a Ship To address with her first kit.

Click [HERE](#) for the next screen and the question





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 140 CHIMNEY ROCK DR ← **HERE**
 VACAVILLE, CA 95687
 Telephone: (000) 000-0000

Total Balance: 0.00
 Donor/Donee: Ship To or Donee Exists
 Previous as of:
 ↑
To the Ship To
 Tax Status: Taxed Total Paid: 27.81

-ST	Seq	#	Number	Qty	Stat	Date	Price	Action	Qty	Amount	Balance
335-A	001	001	010579	001	COM	01/12/09	27.81	CC Payment	001	27.81	0.00
			PA1176	30D	3PC CLB W/ GT	01/12/09					
335-A	EMAIL SENT - PAYMENT RECEIVED 01/14/09										
335-A	EMAIL -ORDER CONFIRM INV#1001 01/13/09										
335-A	EMAIL SENT - PRODS ARE TBC 01/12/09										
335-A	PREAUTH# 100 SHIPMENT 001 01/09/09										
Marketing Program 335 BALANCE =											0.00
300	000	000	801175	001	COM	02/11/09	0.00				0.00
			PA0343	30	DAY CLEANSER 20Z						
			801183	001	COM	02/11/09	0.00				
			PA0344	30	DAY TONER 20Z						
			801191	001	COM	02/11/09	0.00				
			PA0347	30	DAY REP LOTION 10Z						
300	000	000	801175	001	COM	01/16/09	0.00	Not Receivd	001	0.00	0.00
			PA0343	30	DAY CLEANSER 20Z	02/10/09					
			801183	001	COM	01/16/09	0.00	Not Receivd	001	0.00	0.00
			PA0344	30	DAY TONER 20Z	02/10/09					
			801191	001	COM	01/16/09	0.00	Not Receivd	001	0.00	0.00
			PA0347	30	DAY REP LOTION 10Z	02/10/09					
Marketing Program 300 BALANCE =											0.00

Where did the January compensation order ship?

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SITE: NEO CSR: AGENT NAME
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More Search Help

Scroll Up and Down the Customer Inquiry. v6.1.37 3/1/2009 5:57 PM

On February 9, a second agent did a Claim Not Received, with Replacement for the 30 day compensation set to this customer.

Click [HERE](#) for the next screen and the question





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 VACAVILLE, CA 95687
 Telephone: (000) 000-0000

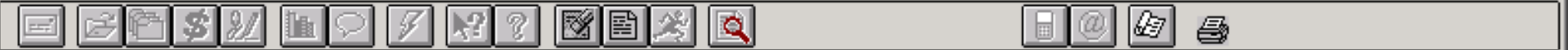
Total Balance: 0.00
 Donor/Donee: Ship To or Donee Exists
 Previous as of:
 ↑
To the Ship To
 Tax Status: Taxed Total Paid: 27.81

-ST	SeqN	#	Number	Qty	Stat	Date	Price	Action	Qty	Amount	Balance
335-A	001	001	010579	001	COM	01/12/09	27.81	CC Payment	001	27.81	0.00
			PA1176	30D	3PC CLB W/ GT	01/12/09					
335-A	EMAIL SENT - PAYMENT RECEIVED 01/14/09										
335-A	EMAIL -ORDER CONFIRM INV#1001 01/13/09										
335-A	EMAIL SENT - PRODS ARE TBC 01/12/09										
335-A	PREAUTH# 100 SHIPMENT 001 01/09/09										
Marketing Program 335 BALANCE =											0.00
300	000	000	801175	001	COM	02/11/09	0.00				
			PA0343	30	DAY CLEANSER 20Z						
			801183	001	COM	02/11/09	0.00				
			PA0344	30	DAY TONER 20Z						
			801191	001	COM	02/11/09	0.00				0.00
			PA0347	30	DAY REP LOTION 10Z						
300	000	000	801175	001	COM	01/16/09	0.00	Not Receivd	001	0.00	0.00
			PA0343	30	DAY CLEANSER 20Z	02/10/09					
			801183	001	COM	01/16/09	0.00	Not Receivd	001	0.00	0.00
			PA0344	30	DAY TONER 20Z	02/10/09					
			801191	001	COM	01/16/09	0.00	Not Receivd	001	0.00	0.00
			PA0347	30	DAY REP LOTION 10Z	02/10/09					
Marketing Program 300 BALANCE =											0.00

Where did the February replacement order ship?



Help



Primary Acct#: 269-997-177 Customer Status: Active Jan 09, 2009 Current as of: Jan 09, 2009 JACKLYN SMITH 140 CHIMNEY ROCK DR VACAVILLE, CA 95687 Telephone: (000) 000-0000	Total Balance: 0.00 Donor/Donee: Ship To or Donee Exists Previous as of:
Tax Status: Taxed	Total Paid: 27.81

Use Different Shipping Address

Customer Information

Title:

First Name: JACKLYN MI:

Last Name: SMITH

Suffix:

Address 1: 140 CHIMNEY ROCK DR

Address 2:

Country: US Zip: 95687 State:

City: VACAVILLE CA

Company Name:

Shipping Address

Title:

First Name: MI:

Last Name:

Suffix:

Address 1:

Address 2:

Country: Zip: State:

City:

Email

OK

Cancel

Where should you click next to make the compensation order ship to her Ship To address?

Phone Number	Type	Status	Created By	Created Date	Updated By	Updated Date
0000000000	Alternate	A	BOS			

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 Telephone: (000) 000-0000

Total Balance: 0.00
 Donor/Donee: Ship To or Donee Exists
 Previous as of:
 Tax Status: Taxed Total Paid: 27.81

-ST	Seq	#	Number	Qty	Stat	Date	Price	Action	Qty	Amount	Balance	
335-A	001	001	010579	001	COM	01/12/09	27.81	CC Payment	001	27.81	0.00	
			PA1176	30D	3PC CLB W/ GT	01/12/09						
335-A			EMAIL SENT - PAYMENT RECEIVED									01/14/09
335-A			EMAIL -ORDER CONFIRM INV#1001									01/13/09
335-A			EMAIL SENT - PRODS ARE TBC									01/12/09
335-A			PREAUTH# 100 SHIPMENT 001									01/09/09
			Market									0.00
300	000	000	801175	001	COM	02/11/09	0.00				0.00	
			PA0343	30	DAY CLEANSER 20Z							
			801183	001	COM	02/11/09	0.00				0.00	
			PA0344	30	DAY TONER 20Z							
			801191	001	COM	02/11/09	0.00				0.00	
			PA0347	30	DAY REP LOTION 10Z							
300	000	000	801175	001	COM	01/16/09	0.00	Not Receivd	001	0.00		
			PA0343	30	DAY CLEANSER 20Z						02/10/09	
			801183	001	COM	01/16/09	0.00	Not Receivd	001	0.00	0.00	
			PA0344	30	DAY TONER 20Z						02/10/09	
			801191	001	COM	01/16/09	0.00	Not Receivd	001	0.00	0.00	
			PA0347	30	DAY REP LOTION 10Z						02/10/09	
			Marketing Program 300 BALANCE =									0.00

Both the Compensation order and the Replacement order went to the 000 address, which is the Billing address. This customer wanted it sent to her different Ship To address.

Click HERE for the next question



Primary Acct#: 265-079-491 Customer Status: Active Nov 03, 2008 Current as of: Jan 13, 2009 ALEX MATHEY 3417 LEBANON PIKE APT F301 HERMITAGE, TN 37076 Telephone: (317) 538-5496	Total Balance: 59.80 Donor/Donee: Ship To or Donee Exists Previous as of: Dec 04, 2008 ALEX MATHEY 17102 WYNDCHASE CIR FRANKLIN, TN 37067 Tax Status: Taxed Total Paid: 135.50
---	---

ORDER HISTORY INQUIRY

Mpg	Addr	Shp	Product	Prod	Prod	Status	Product	Applied	Applied		
-ST	SegN	#	Number	Qty	Stat	Date	Price	Action	Qty	Amount	Balance
335-A	001	002	011239	001	COM	01/30/09	97.65	CC Payment	001	37.85	59.80
			PA4260	5PC	90DY	CONT	OEM DOC	01/30/09			
335-A	001	001	011130	001	COM	11/04/08	97.65	CC Payment	001	29.90	0.00
			PA1185	5PC	90D	AC W/	OEM DOC	12/30/08			
								CC Payment	001	29.90	
								12/02/08			
								CC Payment	001	37.85	
								11/04/08			
335-A	NEXT SHIPMENT DATE = 04/20/09					01/26/09					
335-A	PREAUTH# 100 SHIPMENT 001					11/03/08					
								Marketing Program 335	BALANCE =	59.80	
								TOTAL BALANCE =		59.80	

Where did the last kit ship?

Click HERE for the next screen and the optional answers

Names and Addresses

Acct Nbr: 265-079-491

Mktg Pgms: (All)

Addr Seq: 002 Ship-To 02-05-2009

Name: ALEX MATNEY

Address-1: 3417 LEBANON PIKE APT F

Address-2:

City: HERMITAGE

State Zip: TN 37076 US

Phone: (317) 538-5496

▲ To This Address

Names and Addresses

Acct Nbr: 265-079-491

Mktg Pgms: (All)

Addr Seq: 001 Ship-To 11-03-2008

Name: ALEX MATNEY

Address-1: 17102 WYNDCHASE CIR

Address-2:

City: FRANKLIN

State Zip: TN 37067 US

Phone: (317) 538-5496

▲ To This Address

Click [HERE](#) to go back and review the Order History Inquiry page.

NC55 - Guthy Renker (Phone) - [Name/Address & Phone]

Help

Primary Acct#: 265-079-491 Customer Status: Active Nov 03, 2008 Current as of: Jan 13, 2009 ALEX MATHEY 3417 LEBANON PIKE APT F301 HERMITAGE, TN 37076 Telephone: (317) 538-5496	Total Balance: 59.80 Donor/Donee: Ship To or Donee Exists Previous as of: Dec 04, 2008 ALEX MATHEY 17102 WYNDCHASE CIR FRANKLIN, TN 37067 Tax Status: Taxed Total Paid: 135.50
---	--

Maintain Mpgm Ship-To Addresses Marketing Program: 335-PROACTIV SOLUTION Ship-To: Yes Addr Seq#: 002 NEW ADDRESS
 Ship-To Action to Apply:

Prefix: None Addr Seq #: 000 Enter three position Ship To, or Donee OK Cancel

Customer Name: ALEX MATNEY

Names and Addresses

Acct Nbr: 265-079-491

Mktg Pgms: (All)

Addr Seq: 001 Ship-To 11-03-2008

Name: ALEX MATNEY

Address-1: 17102 WYNDCHASE CIR

Address-2:

City: FRANKLIN

State Zip: TN 37067 US

Phone: (317) 538-5496

Where is the next kit shipping?

← To This Address

To This Address →

Names and Addresses

Acct Nbr: 265-079-491

Mktg Pgms: (All)

Addr Seq: 002 Ship-To 02-05-2009

Name: ALEX MATNEY

Address-1: 3417 LEBANON PIKE APT F

Address-2:

City: HERMITAGE

State Zip: TN 37076 US

Phone: (317) 538-5496

Primary Acct#: 265-079-491 Customer Status: Active Nov 03, 2008 Current as of: Jan 13, 2009 ALEX MATHEY 3417 LEBANON PIKE APT F301 HERMITAGE, TN 37076 Telephone: (317) 538-5496	Total Balance: 59.80 Donor/Donee: Ship To or Donee Exists Previous as of: Dec 04, 2008 ALEX MATHEY 17102 WYNDCHASE CIR FRANKLIN, TN 37067 Tax Status: Taxed Total Paid: 135.50
---	---

<input type="checkbox"/> Maintain Mpgm Ship-To Addresses	Marketing Program 335-PROACTIV SOLUTION	Ship-To: Yes	Addr Seq#: 002	<input type="checkbox"/> NEW ADDRESS Ship-To Action to Apply
---	--	--------------	----------------	---

This Address ↘

Prefix: None	Addr Seq #: 001	Enter three position Ship To, or	<input type="button" value="OK"/>
Customer Name: ALEX MATHEY			<input type="button" value="Cancel"/>

Which address do you change to change the customer's ship To address?

Primary Acct#: 265-079-491 Customer Status: Active Nov 03, 2008 Current as of: Jan 13, 2009 ALEX MATHEY 3417 LEBANON PIKE APT F301 HERMITAGE, TN 37076 Telephone: (317) 538-5496	Total Balance: 59.80 Donor/Donee: Ship To or Donee Exists Previous as of: Dec 04, 2008 ALEX MATHEY 17102 WYNDCHASE CIR FRANKLIN, TN 37067 Tax Status: Taxed Total Paid: 135.50
---	---

<input type="checkbox"/> Maintain Mpgm Ship-To Addresses	Marketing Program 335-PROACTIV SOLUTION	Ship-To: Yes	Addr Seq#: 002	<input type="checkbox"/> NEW ADDRESS Ship-To Action to Apply
---	--	--------------	----------------	---

This Address ↘

Prefix: None	Addr Seq #: 002	Enter three position Ship To, or	<input type="button" value="OK"/>
Customer Name: ALEX MATHEY			<input type="button" value="Cancel"/>

Primary Acct#: 265-079-491 Customer Status: Active Nov 03, 2008 Current as of: Jan 13, 2009 ALEX MATHEY 3417 LEBANON PIKE APT F301 HERMITAGE, TN 37076 Telephone: (317) 538-5496		Total Balance: 59.80 Donor/Donee: Ship To or Donee Exists Previous as of: Dec 04, 2008 ALEX MATHEY 17102 WYNDCHASE CIR FRANKLIN, TN 37067 Tax Status: Taxed Total Paid: 135.50	
---	--	--	--

<input type="checkbox"/> Maintain Mpgm Ship-To Addresses	Marketing Program 335-PROACTIV SOLUTION	Ship-To Yes	Addr Seq# 002	<input type="checkbox"/> NEW ADDRESS Ship-To Action to Apply
---	--	----------------	------------------	--

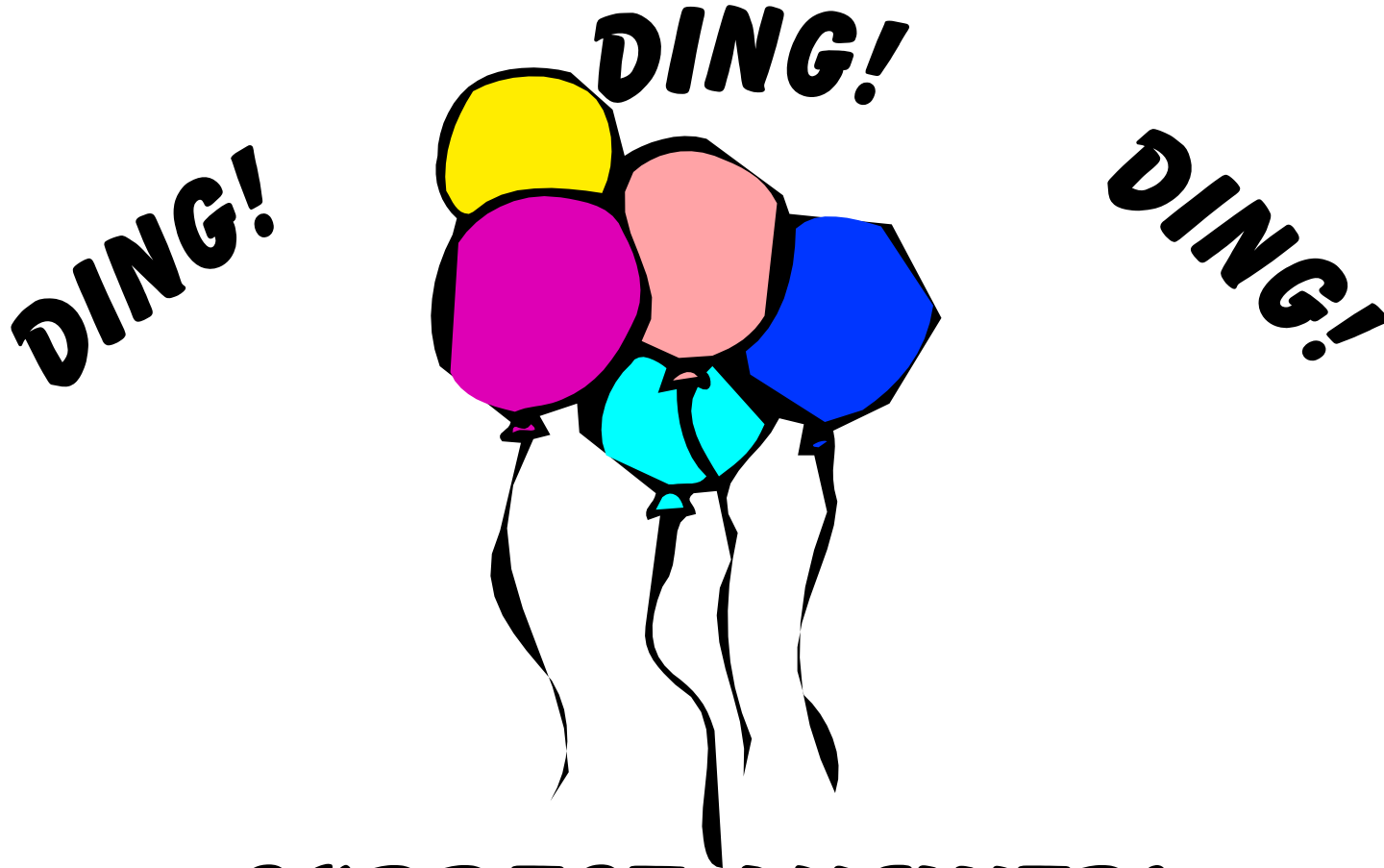
Prefix : None	Addr Seq # 002	Enter three position Ship To, or	<input type="button" value="OK"/>
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Customer Name : ALEX MATNEY

You can see that, **Yes**, a Ship To address is being used for the continuity shipments. You must match the **address blocks** to edit below, to the **sequence number** being used.

If it says **No**, you must either edit the Billing address or add a new Ship To address.

Click [HERE](#) for the next question



CORRECT ANSWER!

It went to the Billing address, (000).
Score 1 and click to move to the next question.

BZZZZZ!



WRONG ANSWER!

Click Here to move to the next question,

or Click [HERE](#) to try again.

OH HAPPY DAY!



CORRECT ANSWER!

It also went to the Billing address, (000).
Score 1 and click to move to the next question.

BZZZZZZ!



WRONG ANSWER!

Click Here to move to the next question,

or Click [HERE](#) to try again.

YOU MAKE ME PROUD!



CORRECT ANSWER!

You know you must type in a different Ship To address, each time a comp or one-shot needs to go to a different address than the billing.

Score 1 and click to move to the explanation.

BZZZZZZ!



WRONG ANSWER!

Click Here to move to the explanation,

or Click [HERE](#) to try again.

WONDERFUL!



CORRECT ANSWER!

The kit went to Ship To address 001.
Score 1 and click to move to the next question.

BZZZZZZ!



WRONG ANSWER!

Click Here to move to the next question,

or Click [HERE](#) to try again.



CORRECT ANSWER!

The Ship To address is being used,
and it shows 002 will be the address.

Score 1 and click to move to the next question.

BZZZZZ!

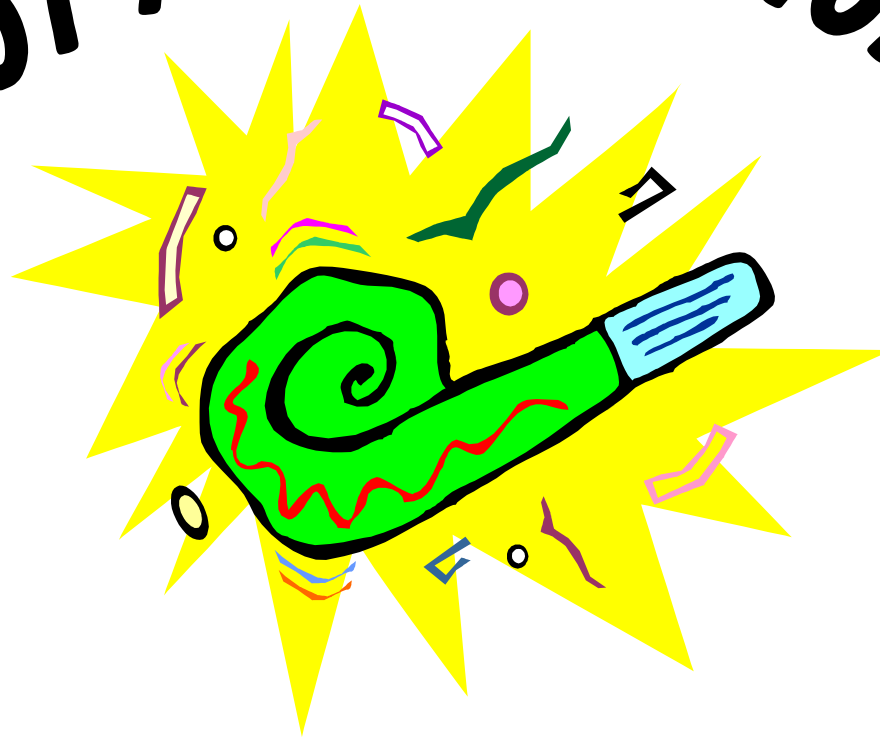


WRONG ANSWER!

Click Here to move to the next question,

or Click [HERE](#) to try again.

TOOT YOUR OWN HORN!



CORRECT ANSWER!

It is quickest to simply update and validate the Ship To being used. In this account it is 002. Score 1 and click to move to the explanation.

BZZZZZZ!



WRONG ANSWER!

Click Here to move to the explanation,

or Click [HERE](#) to try again.

EXCELLENT!



CORRECT ANSWER!

Score 1 and click to move to the next question.

BZZZZZZ!



WRONG ANSWER!

Click Here to move to the next question,

or Click [HERE](#) to try again.

END OF THE EXERCISE!

