



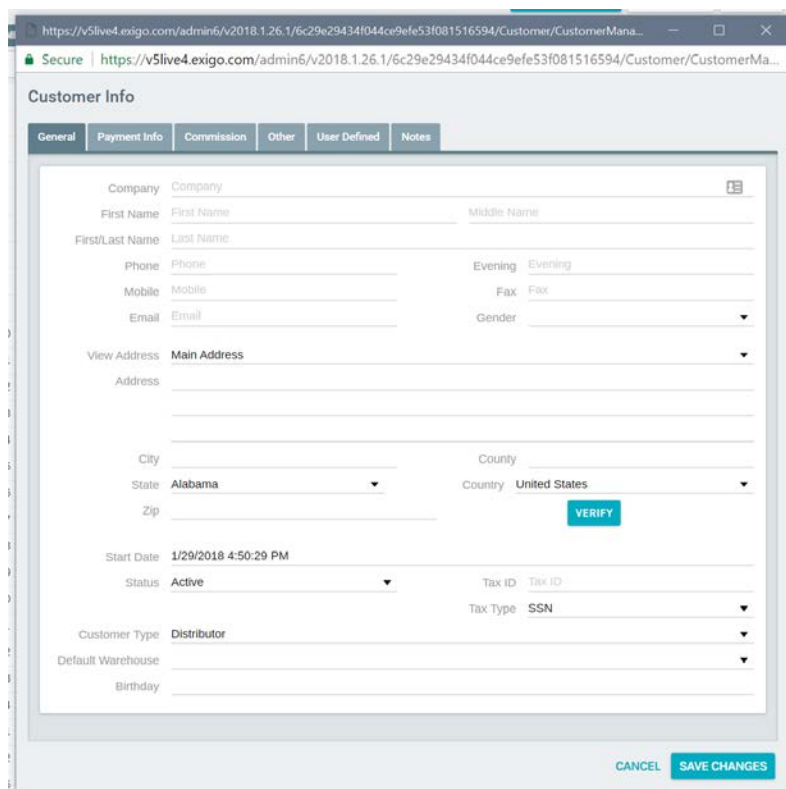
Transfer Customer Business

v1.0

Transferring Customer Business

When a distributor sells their business to another distributor, all the downline information needs to be transferred from the original distributor so that the new distributor can be set up on the existing account. **The vendor bills and payments need to be kept so that you can issue two 1099's at the end of the year.**

To begin the transfer process, create a new account for the distributor who is selling their business. Select **New Customer** from the **Customer Search** menu bar and complete the **Customer Info**.



The new account should include a company name such as: **ARCHIVE - DT # xxxxx**.

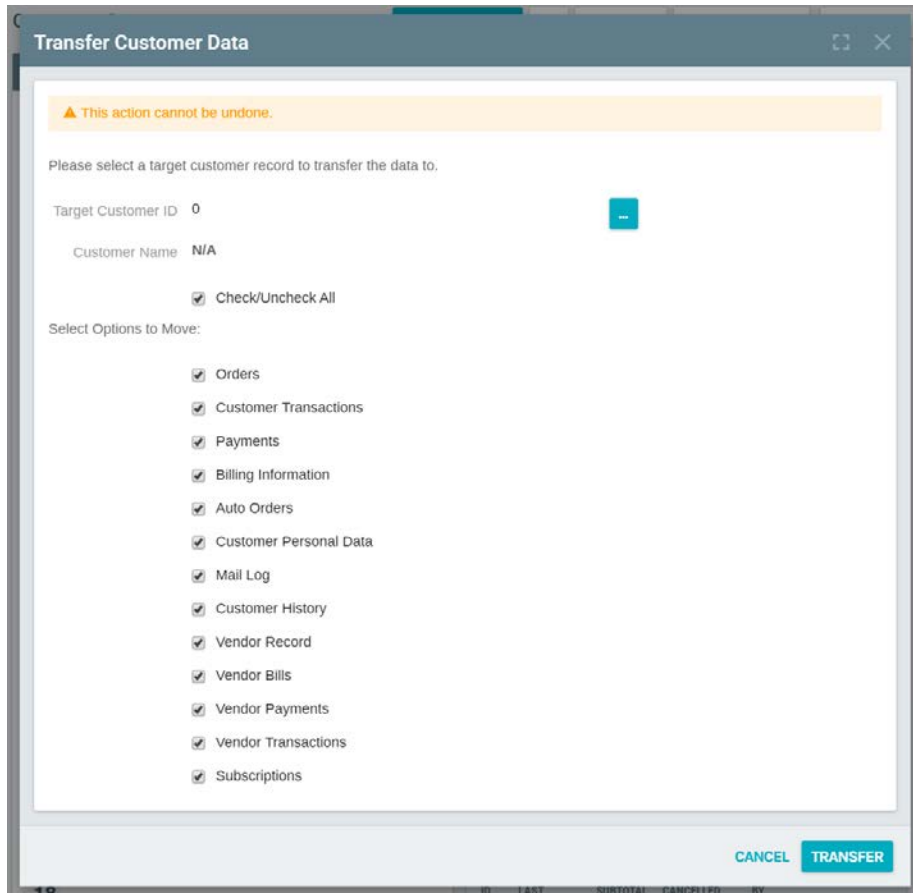
The only other information you need to enter is under the **Commissions** tab for **Enroller** and **Sponsor ID**. Enter the **existing account number** in both of these fields.

Once the new account is set up, go back to the original account and select **Transfer**.

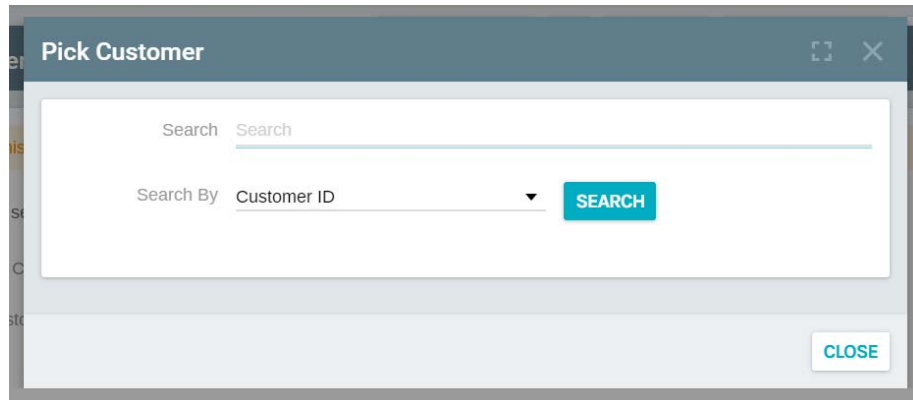


The following screen will display.

Click on the **box with the 3 dots** and from the popup, enter the target **customer ID** which is the **NEW account** you just set up.



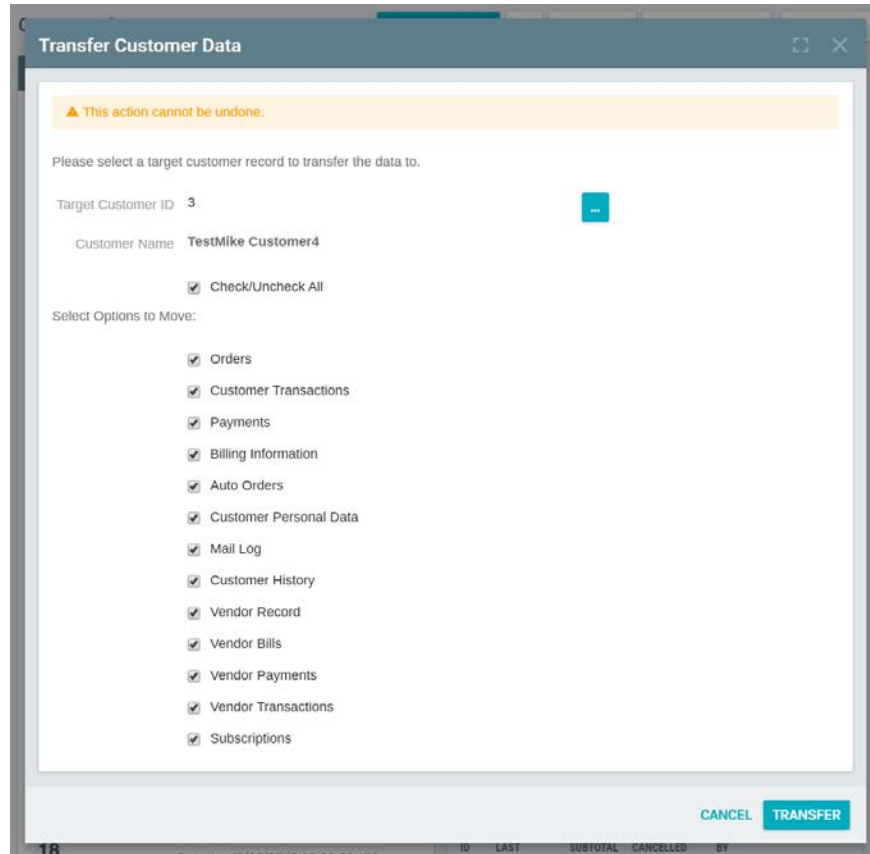
The screenshot shows a dialog box titled "Transfer Customer Data". At the top, there is a warning message: "▲ This action cannot be undone." Below this, the text reads: "Please select a target customer record to transfer the data to." The "Target Customer ID" field is currently set to "0" and has a dropdown menu icon (three dots) to its right. The "Customer Name" field is set to "N/A". There is a "Check/Uncheck All" checkbox which is checked. Under the heading "Select Options to Move:", there is a list of items, each with a checked checkbox: Orders, Customer Transactions, Payments, Billing Information, Auto Orders, Customer Personal Data, Mail Log, Customer History, Vendor Record, Vendor Bills, Vendor Payments, Vendor Transactions, and Subscriptions. At the bottom right of the dialog, there are two buttons: "CANCEL" and "TRANSFER".



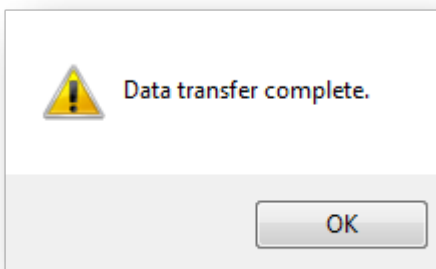
The screenshot shows a dialog box titled "Pick Customer". It features a search bar with the placeholder text "Search" and a "SEARCH" button to its right. Below the search bar, there is a "Search By" dropdown menu currently set to "Customer ID" and another "SEARCH" button. At the bottom right of the dialog, there is a "CLOSE" button.

Once selected, the new account will show in the **Target Customer ID** field.

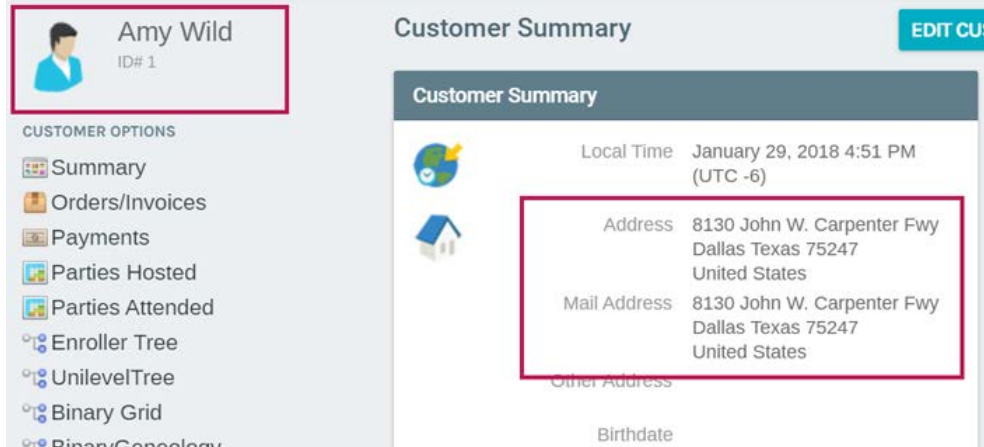
Select the items you want to **MOVE** to the **new account (Target)**:



Click **OK**; the system will say the transfer is complete.



Check the new account and **verify the correct information** is showing.



Amy Wild
ID# 1

Customer Summary [EDIT CUS](#)

Customer Summary

Local Time: January 29, 2018 4:51 PM (UTC -6)

Address: 8130 John W. Carpenter Fwy
Dallas Texas 75247
United States

Mail Address: 8130 John W. Carpenter Fwy
Dallas Texas 75247
United States

Other Address

Birthdate

The existing account will still show the old distributor's personal information so **you will need to edit the account and update** it with the **new distributor's information**. The downline information is still in place but all orders/invoices, payments, commissions, recurring orders, etc. have been **removed**.

Go back to the original account. Set up the new distributor's information and auto-shipment order by clicking on **Edit Customer** to change the distributor information to the new owner and click on **New Recurring order** to setup the autoship.

Update and verify that all the new information is correct.

Note: If a transfer is done in the middle of the year, a 1099 form will be sent to both the original owner and the new owner based when they had ownership of the account.