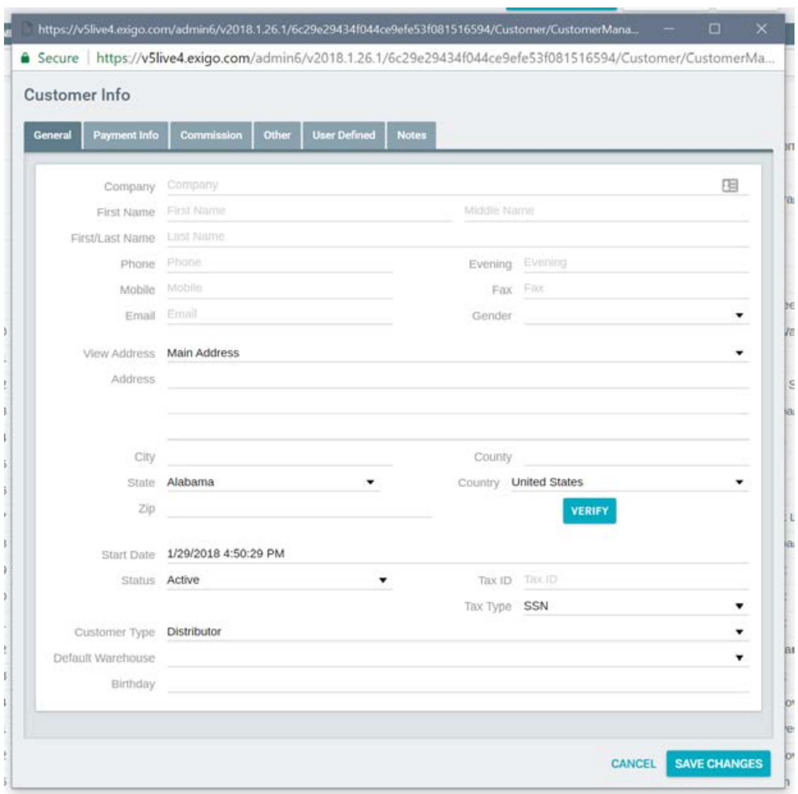
Transfer Customer Business

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.

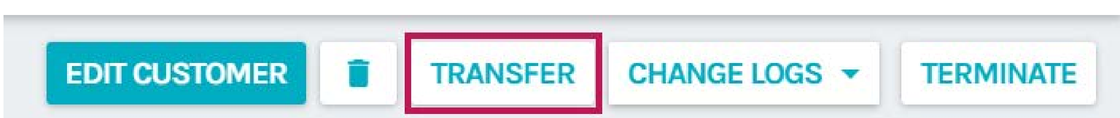
To begin the transfer process, create a new account for the distributor who is selling their business. Select **New Customer** from the **Customer Search menu** bar and complete the **Customer Info.**



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

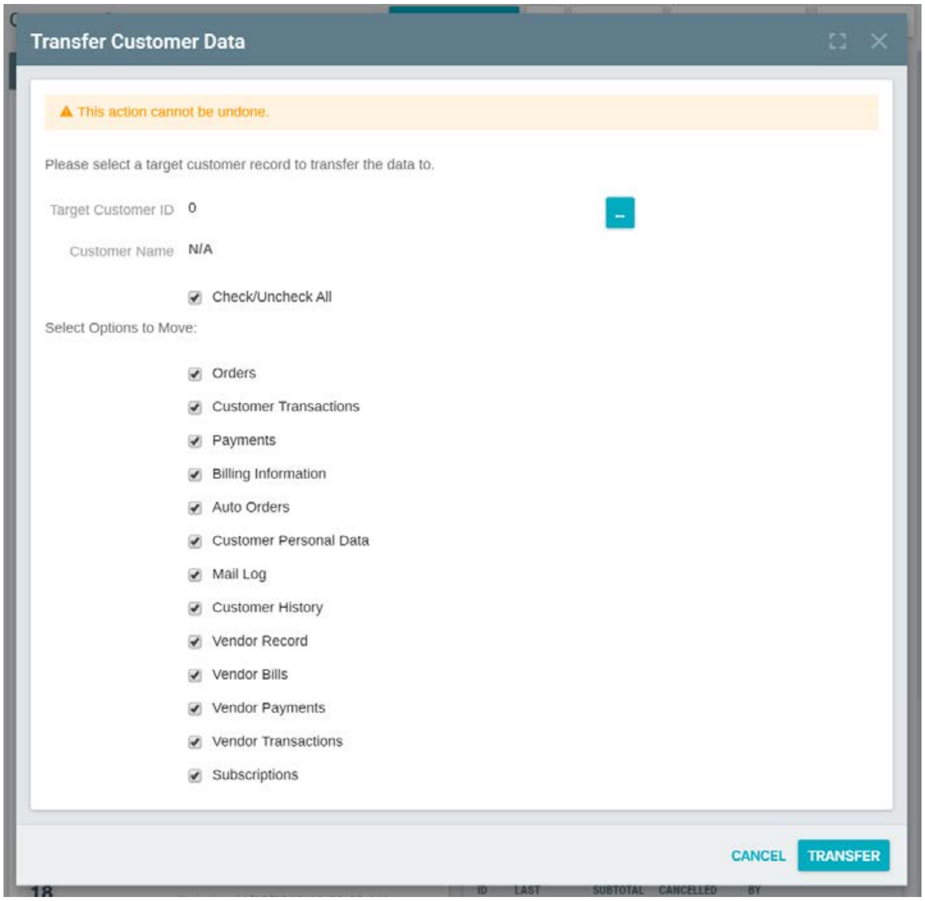
The only other information you need to enter is under the **Commissions tab** for **Enroller** and **Sponsor ID.** Enter the **existing account number** in both of these fields.

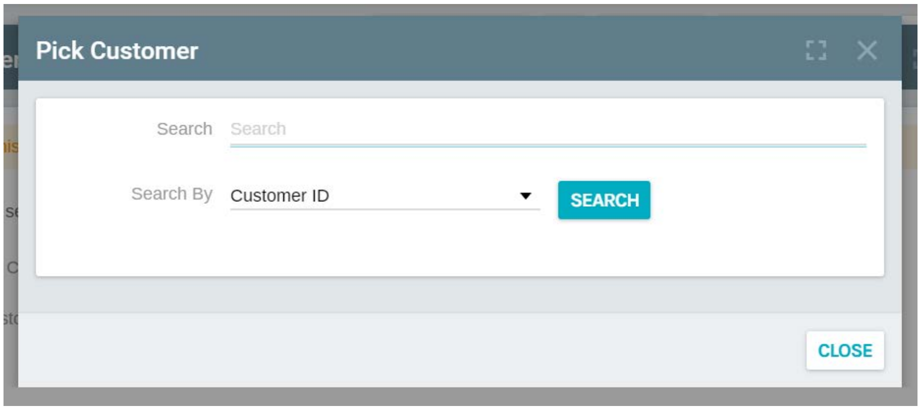
Once the new account is set up, go back to the original account and select **Transfer.**



The following screen will display.

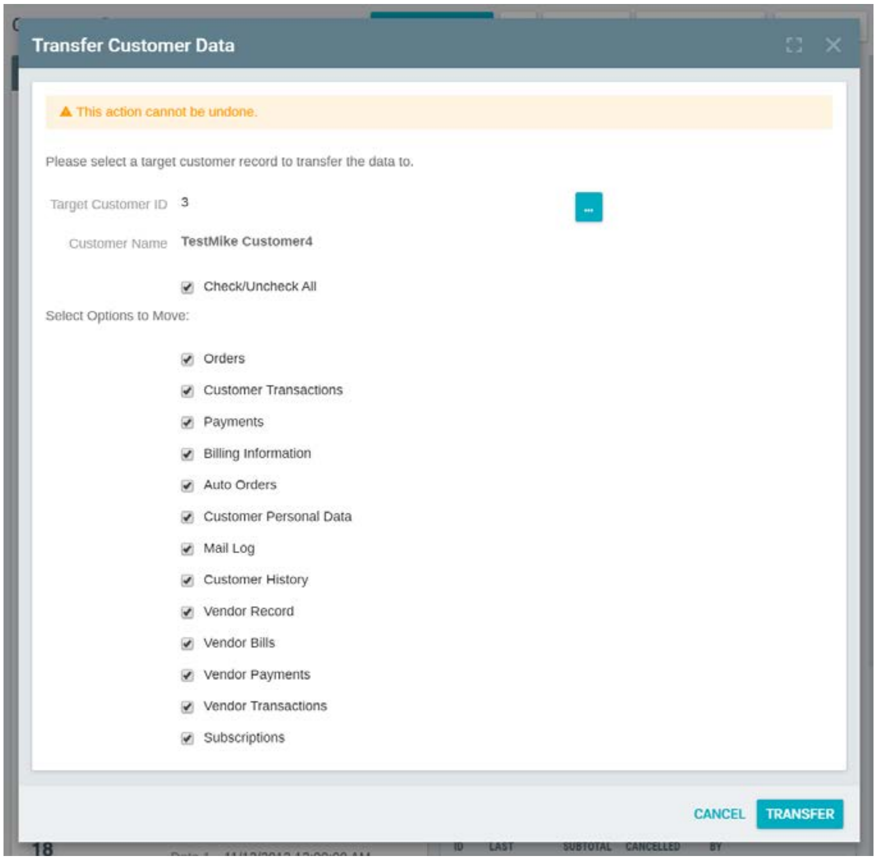
Click on the **box with the 3 dots** and from the popup, enter the target **customer ID** which is the **NEW account** you just set up.



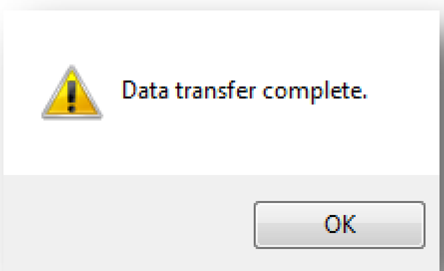


Once selected, the new account will show in the **Target Customer ID field.**

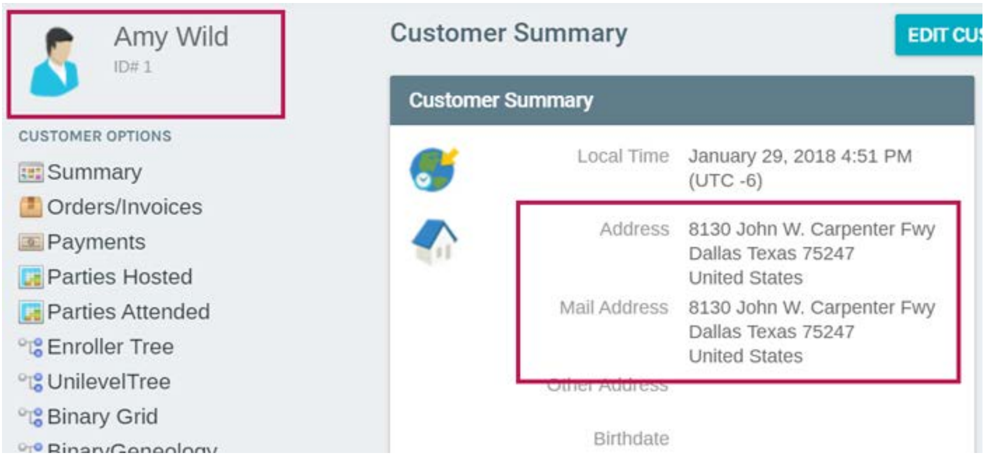
Select the items you want to **MOVE** to the **new account (Target):**



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



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



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.