

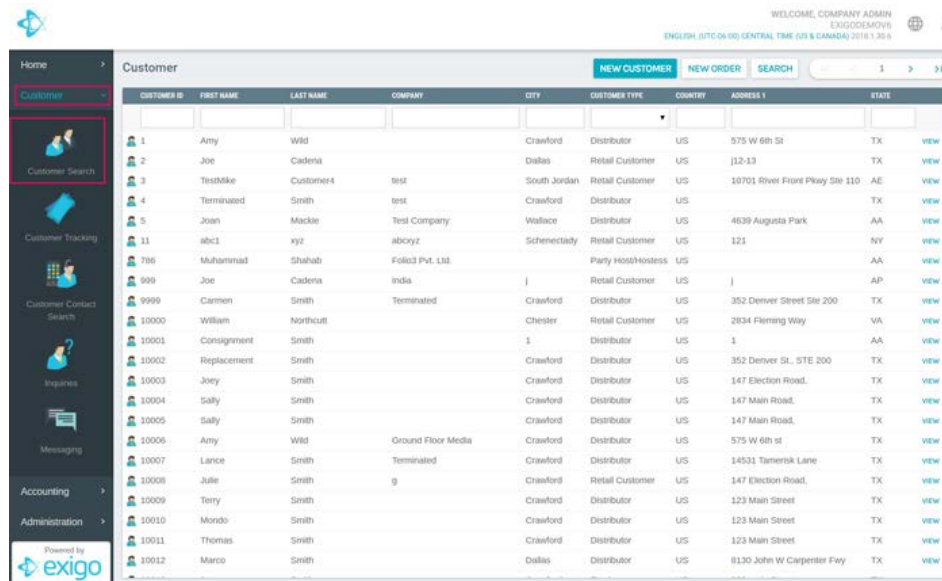


How to Move a Customer in the Tree

v1.0

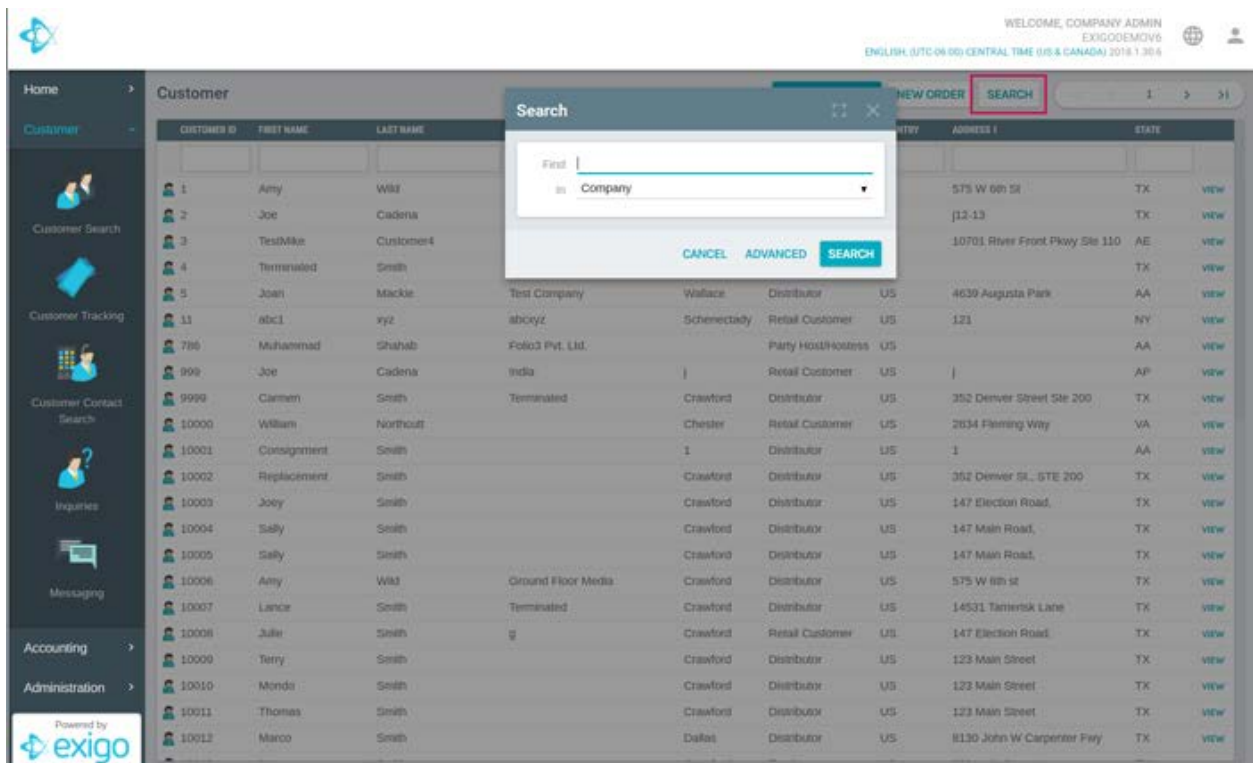
How to Move Customers in a Tree

- Locate the Customer you want to move. You can do this by clicking on the **Customer Section** in the right hand menu.
- Then Click on **Customer Search**.
- This will bring you to a screen with multiple customers listed:

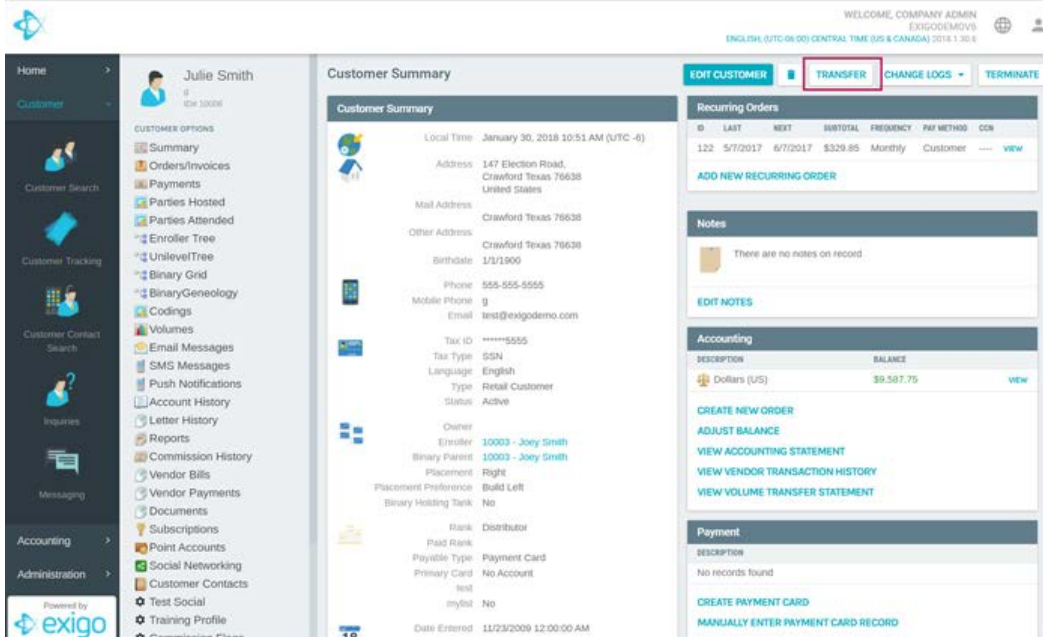


CUSTOMER ID	FIRST NAME	LAST NAME	COMPANY	CITY	CUSTOMER TYPE	COUNTRY	ADDRESS 1	STATE	
1	Amy	Wild		Crawford	Distributor	US	575 W 6th St	TX	VIEW
2	Joe	Cadena		Dallas	Retail Customer	US	112-13	TX	VIEW
3	TestMike	Customer4	test	South Jordan	Retail Customer	US	10701 River Front Pkwy Ste 110	AE	VIEW
4	Terminated	Smith	test	Crawford	Distributor	US		TX	VIEW
5	Joan	Mackie	Test Company	Wallace	Distributor	US	4639 Augusta Park	AA	VIEW
11	abc1	xyz	abxyz	Schenectady	Retail Customer	US	121	NY	VIEW
786	Muhammad	Shahab	Foliod Pvt. Ltd.		Party Host/Hostess	US		AA	VIEW
999	Joe	Cadena	India	J	Retail Customer	US	J	AP	VIEW
9999	Carmen	Smith	Terminated	Crawford	Distributor	US	352 Denver Street Ste 200	TX	VIEW
10000	William	Northcutt		Chester	Retail Customer	US	2834 Fleming Way	VA	VIEW
10001	Consignment	Smith			Distributor	US	1	AA	VIEW
10002	Replacement	Smith		Crawford	Distributor	US	352 Denver St., STE 200	TX	VIEW
10003	Joey	Smith		Crawford	Distributor	US	147 Election Road,	TX	VIEW
10004	Sally	Smith		Crawford	Distributor	US	147 Main Road,	TX	VIEW
10005	Sally	Smith		Crawford	Distributor	US	147 Main Road,	TX	VIEW
10006	Amy	Wild	Ground Floor Media	Crawford	Distributor	US	575 W 6th st	TX	VIEW
10007	Lance	Smith	Terminated	Crawford	Distributor	US	14531 Tamersok Lane	TX	VIEW
10008	Julie	Smith	g	Crawford	Retail Customer	US	147 Election Road,	TX	VIEW
10009	Terry	Smith		Crawford	Distributor	US	123 Main Street	TX	VIEW
10010	Mundo	Smith		Crawford	Distributor	US	123 Main Street	TX	VIEW
10011	Thomas	Smith		Crawford	Distributor	US	123 Main Street	TX	VIEW
10012	Marco	Smith		Dallas	Distributor	US	8130 John W Carpenter Fwy	TX	VIEW

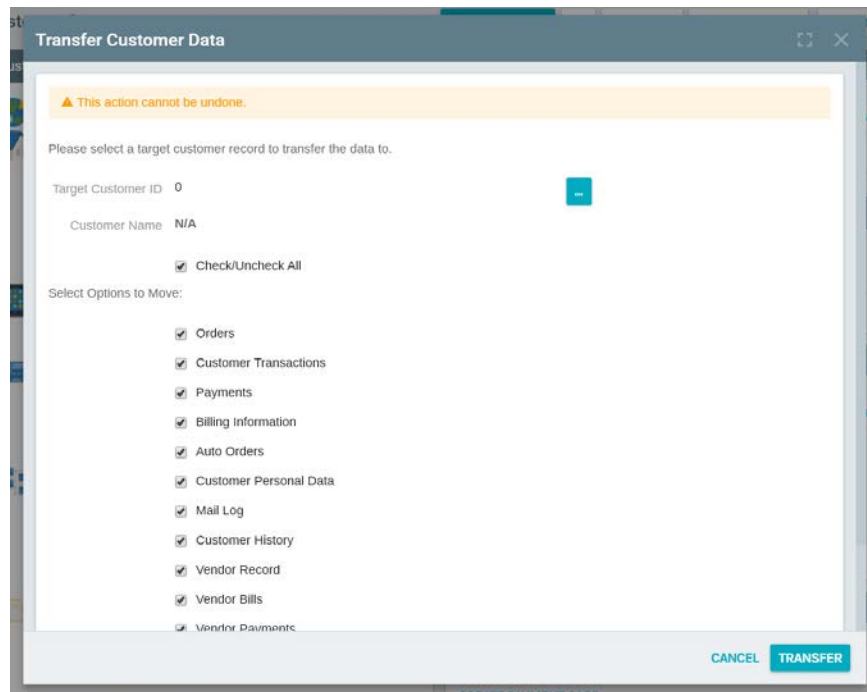
- Next: Click on **Search** in the upper right hand corner, **or** simply **click on the customer** you want to change if he is on the screen.
- You can search by several criteria including **First Name, Company, Last Name,** and **CompanyId** to name a few.



- After entering in the correct search criteria, click on **Search.** (or double click on the **customerid in the list**) and you will see the following screen. Next you will want to **select the correct tree** that you want to make a move in. By clicking on the **item marked #1** select the Tree that you wish to change.
NOTE: This label changes according to what section you are in. If it says orders, it will show all the orders in the right most pane. If it says History, it will show all the customer history in the right hand pane, and so on.
- Click on the label, and **select Unilevel Tree.**
- You will now see something similar to the image below. To make a move in this tree simply click on the word **Transfer.**



- After clicking on the word move, you will see something like the image below.



- Simply **enter the CustomerID** you wish to move this customer under.
If you do not know the CustomerID you can click on **the blue box with three dots**, and search for a customer using some of the same search criteria mentioned above.
- **If you wish to move someone in the enroller tree**, use the same steps, but **select Enroller tree instead** of unilevel.