



## **DIRECT SELLING PARTY PLAN SOFTWARE**

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## **PARTY PLAN SOLUTIONS OVERVIEW**

Party Plan Solutions is a software development and business consulting firm dedicated to serving direct selling companies who market their products and services primarily through home parties. Because the culture and business requirements of direct selling party plan companies are so unique, we exclusively focus all of our products and services on serving home party plan companies.

From a product standpoint, our primary goals are usability and value. Our software development platform and practices enable us to provide reliable, scalable, feature rich software at a great value.

Our staff has significant Direct Selling Party Plan software development, executive management, operations, and IT management experience, which enables us to provide a high level of value to our clients.

To our clients, we are committed to thoroughly understanding their business, maintaining our technology advantage, and continually improving our products and services. We are a proactive partner and consider it a responsibility to help our clients succeed.

## **INTEGRAL SOFTWARE OVERVIEW**

*Integral* is a 100% web-based software application developed in the latest Microsoft.Net framework. *Integral* is a hosted software application, which runs on the Microsoft Windows 2003 operating system utilizing Microsoft's SQL Server 2005 database. This software offers a wide range of user configuration options, which allows flexibility and helps to minimize software customization requests.

*Integral* is designed exclusively for Direct Selling Party Plan businesses and provides the industry's most flexible configuration options for Hostess Plans and guest purchasing specials. Changes to Hostess Plans and Hostess and guest incentive specials often need to be implemented on a very short schedule. With *Integral's* strong configuration capabilities, many changes can be implemented, easily, without any programming. Party Plan companies are able to make changes quickly to capitalize on sales and marketing strategies.

Since *Integral* is web based, there are no hardware requirements to use the software. Only a web browser, Internet connection, and the appropriate security credentials are required to access the application from anywhere in the world.

## **INTEGRAL STANDARD FEATURES**

### **Order Processing**

- Process multiple order types including: party orders, individual orders, and business supply orders.
- Commissions (retail profits) can be taken at time of order entry or as part of commission processing.

- Orders may be shipped to Hostess, Customers, or Consultant or combination of all.
- Customer “bonus buys” and specials
  - Buy/get specials based on quantities or dollar amounts purchased by guests.
  - Quantity Discounts based on purchases of individual items or items belonging to a category.
- Flexible Hostess Rewards system. Half price items, booking awards, purchasing guest awards, Hostess Dollars, Hostess Exclusive items, Hostess free shipping. All award levels and reward percentages/amounts are user defined.
- Booking Tracking System allows for booking award redemption at time of original party entry or booked party entry.
- Backorder Management System
- Allows for multiple price levels/commissionable volume per item
- Automatic Sales tax calculations via database subscription.
- Multiple freight carriers and shipping methods
- Multiple shipping calculation options
- Multiple payment types
- Real-time credit card processing
- User-defined commissionable volumes
- Order comments
- Orders can be flagged for shipping or commissions hold
- Standard Interface to UPS Worldship, Fedex Ship Manager, DHL
- Autoship module included
- Items may be ordered from Personal Inventory

## **Inventory Management**

- Multiple Warehouses
- Available Inventory personalization options for colors, monogramming, etc.
- Item selections for sizes, colors, groups, etc.
- Unlimited number of pricing levels supported.
- Percentage pricing setup automation
- Real-time stock allocation
- Kit creation/components
- Bin locations
- Inventory transaction history
- Integrated purchase order module
- Warehouse transfers
- Returns Module with optional reversal of commissions/bonuses paid.

## **Genealogy Management**

- Graphical/interactive indented genealogy format
- Easily traverse the genealogy.
- Default price levels by rank
- Placement/enroller change
- Title/Rank change
- Manage status (Active, inactive, terminated)
- Audits all genealogy changes.
- Automated monitoring of genealogy integrity
- Current and historical period performance information
- Unmatched retrieval speeds for any genealogy size.

- Viewing options include filtering by geographical location, by title, sales and recruiting activity, and genealogy depth.

## **Accounts Receivable**

- Track AR by invoice or customer.
- Invoice shortages may be collected from commissions.
- Account statements can be printed.
- Enter invoice debits or credits

## **Commissions Processing**

- Commission calculations according to the client's compensation plan.
- Commission adjustment entry/change.
- Commission transaction auditing system
- Commission check and statement printing
- Hold commissions per order
- USA 1099 reporting

## **Customer Service Management**

- Centralized customer service module provides single dashboard view of order history, commission history, account balances, and customer service "Notes" with "drill down" option to view all details.
- Simple, direct navigation to enter orders, edit Consultant information, view genealogy, view Consultant website.
- Unlimited time/date/user stamped notes.
- Follow-up creation for assigning leads and tasks to Consultants. Consultants are notified of the follow-up record in the back office portion of their personal website.

## **Security/Support**

- Database encryption of all credit card numbers.
- Configurable user menus
- Configurable user permissions.
- System lockout function for employees and web users to prevent access to the application.
- Automated monitoring and reporting of abnormal software or database conditions.
- Support email link

## **Reporting**

- Accounting
  - Account Adjustments By Reason Code
  - Account Balances
  - Cash Receipts Register
  - Cash Receipts Summary
  - Consultant Transactions
  - Sales Tax Collected - Detail
  - Sales Tax Collected -Summary
  - Year End Volume and Taxable Earnings

- **Commissions**
  - Check Register
  - Commission Earnings By Pay Code
  - Commission Transaction Audit
  - Commission Statement
  - Commission Summary
  
- **Consultants**
  - Active Consultants
  - Consultant List By ID Number
  - Consultant List By Name
  - Consultant Order History
  - Consultant Rank Chart
  - Consultant Rank Summary
  - Consultant Volume Summary
  - Consultant Websites
  - Enrollments by Month
  - Locator Lead Assignment
  - Recruiting
  - Top Parties
  - Top Sponsors
  
- **Employees**
  - Commissions Processing and Rollbacks
  - Consultant Account Creation and Modifications
  - CSR Account Modifications
  - Employee Roster
  - Next Id Changes
  - Order Deletion And Recovery
  - Order Edits
  - Order Status Changes
  - Print Order Usage
  - Ship Verify Usage
  - Various Audits
  
- **Inventory**
  - Cost of Goods
  - Inventory Below Min On Hand
  - Inventory By Vendor
  - Inventory By Warehouse
  - Inventory On Hand By Date
  - Inventory On Hand
  - Inventory Out Of Stock
  - Inventory Pricing
  - Inventory Transaction Detail
  - Inventory Transaction Summary
  - Product Detail
  - Product Transaction Detail
  - Products By Category
  - Products By Pricing Category
  - Products By Product Type

- Products On Backorder
- Products On Order
- Purchase Order Summary
- Return Detail
- Returned Product By Reason Code
- Returned Products
- Returns Summary By ID Number
- Returns Summary
  
- **Orders**
  - Event Date - Order Date Comparison
  - Orders Marked Do Not Pay Commissions
  - Scheduled Bookings
  - Scheduled Events
  - UnSubmitted Orders
  - Unused Bookings
  
- **Sales**
  - Auto Shipments List
  - Commissionable Sales
  - Daily Sales Breakdown By Category
  - Daily Sales Breakdown By Item
  - Gift Certificate Listing
  - Party Sales Statistics
  - Sales By Consultant State
  - Sales By Entry Date
  - Sales By Order Date
  - Sales By Order Type
  - Sales Order Listing - Detail
  - Sales Order Listing - Summary
  - Sales Order Report by Order Date
  - Sales Register Report
  
- **Shipping**
  - Orders Marked Do Not Ship
  - Orders Printed But Not Shipped
  - Shipping Charges versus Shipping Costs
  
- Online Database Schema
- User defined data driven query tool for exporting of data.

## **Consultant Web based Tools**

- Personal Web sites (Single Template)\*
  - Real-time, fully integrated shopping cart
  - Upload personal story and photo
  - Control of contact info (phone, address, email address, etc.)
  - Customize keyword and description meta tags used in search engine submission
  - Real-time, fully integrated new Consultant enrollment

- Display of Event Calendar (Scheduled parties, trainings, etc.) with contact information, directions, and maps.
- Online Event Management System – Schedule parties and other events. Send electronic invitations to guests including RSVP options and ability to shop online with order counting toward party total.
- Consultant Back Office (Available to all Consultants)
  - Edit profile to change address, phone number, email address.
  - View commission qualification, earnings summary, and transaction detail information by commission period.
  - Real-time, integrated order entry for Party Orders, Business Supply orders, or any user defined type of order.
  - Un-Submitted order functionality to resume entry of suspended orders or orders terminated due to lost connections.
  - Genealogy advanced filtering options including: by period, by state, by title, by level, active and inactive.
  - View order history and track order shipments.
  - Real time access to Returns/Exchanges information.
  - Booking Manager for tracking and canceling bookings.
  - Company “Tools” link for company documents, updates, brochures. All maintained by the company.
  - Help link for emailing company customer service mailbox.

\*Replicating websites are included with the standard Party Plan Solutions software package at **no additional charge** to the client or to the client’s field sales force. Clients may charge Consultants for replicating websites as a way to offset the Monthly Hosting and Support fee charged by Party Plan Solutions. Any monies collected by the client belong entirely to the client.