



**Integral
Party Plan Software**

Implementation Options – 2015

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.

We are committed to thoroughly understanding our Clients' 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 operating system utilizing Microsoft's SQL Server 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 Software Implementation Options

The *Integral* Enterprise solution gives client a 100% customizable approach to running their Party Plan business. Specific features are detailed in the next section of this document.

Software Features & Implementation Options

Consultant Online Tools

- Personal Web Sites / unlimited # pages and content / fully integrated with Google Analytics
- 100% Content Management System for Personal Websites / Online Offices
- Fully integrated Shopping Cart
- Branded Email Forwarding for Consultants
- Fully integrated new Consultant Enrollment
- Control of Profile information (phone, address, email address, etc.)
- Real-time, fully integrated Order Entry for Party Orders, Business Supply orders, or any other User defined type of order
- 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
- Hostess Portal – Allow Hostess' to participate with party planning tasks
- View Order History and track order shipments
- Mobile device credit card swiping integrations
- Mobile Interface Functionality
- Real time access to Returns/Exchanges information
- Genealogy (Downline) reporting in graphical / interactive indented format makes it easy to traverse the genealogy
- Basic Downline viewing and filtering options including: by period
- Advanced Downline filtering options including: by period, by state, by title, by level, active and inactive (includes email & export capabilities)
- View Commission Earnings Summary and transaction detail information by commission period
- Booking Manager for tracking and canceling bookings.
- Customer Contacts Database
- Customer Contacts Bulk Email Tools
- Account Transaction Viewing
- Display of Event Calendar (Scheduled parties, trainings, etc.) with contact information, directions and maps.
- Company "Tools" link for company documents, updates, brochures. All maintained by the company.
- Consultant Locator / Leads Assignment

Order Processing

- Real-time, fully integrated Order Entry for Party Orders, Business Supply orders, or any other User defined type of order
- 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 & Hostess buy/get specials based on quantities or dollar amounts purchased by guests
- Flexible Hostess Rewards system. Half-price items, booking awards, purchasing guest awards, Hostess Dollars, Hostess Exclusive items, Hostess free shipping (all levels User defined)
- Quantity Discounts based on purchases of individual items or items belonging to a category.
- Booking Tracking System allows for booking award redemption at time of original party entry or booked party entry
- Auto-Ship / Subscription processing for recurring orders

Software Features & Implementation Options

Order Processing (con't)

- *Allows for multiple price levels / commissionable volume per item*
- *Automatic Sales tax calculations (third-party database subscription recommended)*
- *Real-time Credit Card processing using PCI compliant tokenization*
- *Multiple payment types within an Order*
- *Gift Certificate Payment Option*
- *Order comments*
- *Orders can be flagged for shipping or commissions hold*
- *Returns Module with linking capabilities between refunded & original orders*
- *Items may be ordered from Personal Inventory*
- *Manage your own Order Rules*

Commissions Processing

- *Commission calculations according to the client's compensation plan*
- *Commission adjustment entry/change*
- *Hold commissions per order*
- *Commission transaction auditing system*
- *Commission check and statement printing*
- *Direct Deposit / ACH processing*
- *USA IRS Form 1099MISC reporting*
- *Unmatched retrieval speeds for any genealogy size*
- *Group view for breakaway-plans*
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Inventory Management

- *Unlimited number of products / pricing levels*
- *Backorder Management System*
- *Real-time, fully integrated stock allocation*
- *Multiple Warehouse support / warehouse transfers / adjustments*
- *Inventory Transaction History*
- *Item Selections for sizes, colors, fragrances, etc*
- *Item Personalization for monogramming, build-your-own products*
- *Real-time, fully integrated Purchase Order module*
- *Restrict product availability by State*

Shipping

- *Multiple freight carriers and shipping methods*
- *Orders may be shipped to Hostess, Customers, or Consultant or combination of all*
- *Custom Invoices & pick/pack documents for shipping orders*
- *Standard XML order export / import option for 3rd party systems*
- *Multiple shipping calculation options*
- *Standard ODBC Interface to UPS, FedEx and US Postal Service*
- *Manage your own shipping rules*

Software Features & Implementation Options

Customer Service Management

- Simple, direct navigation to Enter & view orders, edit Consultant information, view Genealogy
- Centralized customer service module provides single dashboard view of Consultant information, order history, commission history, account balances, volume information, subscriptions, and customer service Notes with drill-down option to view all details
- 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
- Event (Meeting) Registration System

Reporting

- Standard Reporting Module (See Appendix A.)
- Export capabilities to Excel, Word and Adobe PDF file formats

Security/Support

- Database tokenization of all credit card numbers / full PCI Compliance
- Configurable user menus / 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
- Unlimited email / phone support

INTEGRAL Software Implementation Investments

There are two fees associated with the *Integral* implementation option you select. These fees are described below:

The Setup Fee includes:

- Hardware, operating system and database licensing
- Hardware, operating system and database configuration
- Integral software license, setup and configuration of Employee, Consultant Virtual Office, Replicated Website and Host Portal applications.
- Compensation plan analysis, design, documentation, programming and testing.
- Hostess program setup.
- Online training.

Site design is not included in the Setup Fee. Party Plan Solutions will provide a site design guideline document which includes a template to be completed by the client website designer. The application of the site design from the template to the actual site is included in the setup fee.

The Monthly Hosting / Support Fee covers all hosting costs, unlimited email and telephone support, and scheduled software upgrades. Each *Integral* implementation option includes a set number of active Consultants in the Monthly Hosting / Support Fee. Once you exceed the respective active Consultant threshold within the billing month, an additional per active Consultant Fee assessed. A Consultant is considered active if at any time during the billing month they have placed an order or have logged into their virtual-office.

Third-Party / Other Cost Considerations

Credit Card Gateway *

Integral supports a seamless integration to both the Pivotal Payments GlobalOne and the ProPay ProtectPay® Gateway APIs. Both solutions provides an end-to-end tokenization approach to credit card processing which addresses many of the challenges for meeting and sustaining PCI compliance and ensures cardholder data never touches the *Integral* environment.

Sales Tax Database Subscription *

Managing sales tax rates within *Integral* is a simple process when you subscribe to a national sales tax database service. *Integral* supports interfaces with both CCH Zip Sales Jr. sales tax database and Tax Data Systems Basic Edition II database.

Secure Socket Layer (SSL) Certificate*

In order to accept orders online with *Integral*, you will need to purchase a Secure Socket Layer (SSL) certificate(s). This special security certificate must be installed on your *Integral* web server. The certificate is issued by companies called Certificate Authorities (CA's). Examples of CA's are Thawte, GoDaddy and Network Solutions. The presence of a security certificate on a web server is the guarantee to the internet user that the web site is legitimate and controlled by you. The fee for a one (1) year SSL certificate for transaction processing is \$444.00 which includes installation by Party Plan Solutions.

Domain Name Registration

You'll need to purchase a domain name for your *Integral* web sites. The same domain name can be used for your Consultant Replicated Sites / Consultant Virtual Office Sites and Employee Console Site. You can purchase your domain name from companies such as GoDaddy and Network Solutions.

Data Conversion Services*

If you are bringing data over from another software platform, data conversion services are available for an additional fee.

Direct Deposit / ACH Payments

If you pay your sales force via direct deposit (ACH), Party Plan Solutions can provide a file to your financial institution's specifications. An hourly fee will be charged for creation of this file.

Graphic Design Services

Site design is not included in the Setup Fee. Party Plan Solutions will provide a site design guideline document which includes a template to be completed by your website designer. The application of the site design from the template to the actual site is included in the setup fee.

Third-Party Integration & Custom Programming Services *

Third-party integration and custom programming solutions are available for Enterprise Plus installations and requires a Dedicated Hosting environment.

*Available through Party Plan Solutions

Appendix A.

Integral Reporting Module

<i>Report Category / Name</i>
Accounting Reports
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
Commission Reports
Check Register
Commission Earnings By Pay Code
Commission Reason Codes Auditing
Commission Trx Audit
Commission Statement
Commission Summary
Consultant Reports
Active Consultant Count by State
Active Consultants
Consultant Activity
Consultant Birthdays
Consultant Groupings
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
Enroller List
Enroller List Mailing Labels
Sponsor List
Sponsor List Mailing Labels

<i>Report Category / Name</i>
Employee Reports
Commissions Processing and Rollbacks
Consultant Account Creation and Modifications
CSR Account Modifications
Employee Roster
Next Id Changes
Order Audits
Various Audits
Inventory Reports
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
Kit Breakdown
Pending Returns
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
Order Reports
Event Date - Order Date Comparison
Order Details
Deleted Orders
Orders Marked Do Not Pay Commissions
Scheduled Bookings
Scheduled Events

<i>Report Category / Name</i>
UnSubmitted Orders
Unused Bookings
Sales Reports
Active Subscriptions
Commissionable Sales
Daily Sales Breakdown By Category
Daily Sales Breakdown by Item and Pricing Level
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 Reports
Orders Marked Do Not Ship
Orders Printed But Not Shipped
Shipping Charges vs. Shipping Costs