

# globalleeHQ

## CUSTOMER REPORT

**Step 1.** Login to your Globallee HQ web office and click on "reports"

The screenshot shows the Globallee HQ dashboard. At the top, there is a navigation bar with 'My HQ' on the left and 'Welcome, Globallee Training (Not you?)' on the right. Below this is a main navigation area with 'SHOP', 'MY BUSINESS', and 'MY TEAM' tabs. A 'CREATE A LINK' and 'VIEW LINKS' button is also present. The main content area features four icons: 'Summary', 'Reports' (highlighted with a yellow box), 'Resources', and 'My Website'. Below the icons, there are two sections: 'Ranks' and 'Key Measures'. The 'Ranks' section shows 'Current Rank', 'Last Month Rank', and 'Lifetime Rank', all set to 'Independent BA'. The 'Key Measures' section displays two tables of data.

Active IBA's in your "2-4-8" Personal Sponsor Group			Active New Preferred Customers in your "2-4-8" Personal Sponsor Group		
	Count	Volume		Count	Volume
Level 1	0	0.00	My PC's	0	0.00
Level 2	0	0.00	Level 1	0	0.00

**Step 2.** Select the report drop down menu and then "customer report"

The screenshot shows the Globallee HQ dashboard with the 'Reports' menu open. The 'New Business' option is highlighted with a yellow box. Below the menu, there is a search bar and a 'Period' dropdown set to '08/21'. A table with columns for '#', 'ID', 'Name', 'First Order Date', 'Volume', 'Country', 'Levels', and 'Sponsor ID' is visible at the bottom.

The screenshot shows the Globallee HQ dashboard with the 'Reports' menu open. The 'Customer Report' option is highlighted with a yellow box. Other options in the menu include 'New Rank Advancements', 'Personal Enrollees', 'Personal Active Enrollments', 'Commission Summary', and 'New Business'. A 'Summa' icon is visible on the right side of the menu.

**Step 3.** Here you'll find all customer details related to your business + entire organization (including the consecutive autoship information for your customers)

The screenshot shows the 'My Reports' section of a dashboard. At the top, there are navigation icons for Summary, Reports, Resources, and My Website. Below this is a header for 'My Reports' with a 'Detailed' view toggle. A dropdown menu is set to 'Customer Report', and there is a search bar. A table below shows customer data with the following columns: #, ID, Name, Levels, Status, First Order Date, Next Auto-ship Date, Most Recent Order Date, Most Recent Order PV, Email, Phone Number, and Er ID. The first row of data is as follows:

#	ID	Name	Levels	Status	First Order Date	Next Auto-ship Date	Most Recent Order Date	Most Recent Order PV	Email	Phone Number	Er ID
1	878883	Nash test, Lauren test	1	P	07/12/2022	08/12/2022	20220712	0.00	laurenmcknight707123456@gmail.com	2142269410	86

This screenshot is similar to the first one but includes an additional column, 'Consecutive Autoship Counter', which is highlighted in yellow. The table structure is as follows:

#	ID	Name	Levels	Status	First Order Date	Next Auto-ship Date	Most Recent Order Date	Most Recent Order PV	Email	Phone Number	Enroller ID #	Consecutive Autoship Counter
1	Lauren test	1	P	07/12/2022	08/12/2022	20220712	0.00	laurenmcknight707123456@gmail.com	2142269410	867176	0.00	

**Report Tip:** Clicking on the column title will sort the report by that information. (For example if you click on "levels" it will filter the report to show your level 1 information first.)