Training Manual

- **Wholesale Customers**
- **Accounts**
  - **Primary and Co-Applicants**
  - **Terminated Accounts**
  - **Account Transfers**
- **Checking Ranks**

Retail Customers

- Enjoy doTERRA products at retail prices

Wholesale Customers

- **Product Discounts**: 25% off retail prices
- **Loyalty Reward Points:** Option to receive 10–30% of orders back in points redeemable for free product
- **Shipping Reward Points:** Option to receive the cost of your shipping back in points redeemable for free product
- **Free Product:** Place a monthly order over 125 PV and receive the free product of the month
- **Renewal Fee "Covered"**: After becoming a Wholesale Member, the yearly renewal fee for a wholesale membership is $25.00. This renewal fee comes with a free bottle of Peppermint, one of the most popular oils dōTERRA offers, a retail value of $27.33.
- **This is the default selection for enrolments**.

Wellness Advocates

- **Bonuses & Compensation:** dōTERRA provides a business opportunity for those interested in creating an income
- **Personal Website:** Receive a personal website that can be used if you would like to share essential oils with others

Plus, all Wholesale Customer benefits:

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- **You must manually select this when enrolling**.

Notes: ....

So I've changed the Period to reflect 06/2017, then the rank to reflect Gold.

If any my qualifying legs have achieved their rank of Premier already in the month, the qualified legs will reflect as Blue.

If the qualifiers are showing as white -this means they have not yet achieved their rank of Premier. Using this tool is helpful during a month when you are aiming for rank advancement - it can provide you with a quick snapshot of your rank as it stands, and if any of your qualifiers has achieved their goal rank, It can allow for recognition and celebration - and for those that haven't yet achieved their goal rank it can allow leaders opportunity to check in and provide further support and assistance.

If you have any questions or you'd like assistance with any Virtual Office training, please reach out to your Account Manager, we really would love to help you.

How do I upgrade from Wholesale Customer to Wellness Advocate?

Upon login to the doterra.com back office, a Wholesale Customer will see a button in the upper right hand corner of the screen that is titled, “Become a Wellness Advocate.”

At this point, the Wholesale Customer can follow the prompts to enter their Social Security Number (SSN) securely, and agree to the Wellness Advocate Terms and Conditions. Then, there will be a prompt to save changes. Once this is done, the Wholesale Customer is instantly upgraded to a Wellness Advocate account.

Can a Wholesale Customer take advantage of the 90-day upgrade move more than one time?

No. A Wholesale Customer can only use the 90-day upgrade move one time. Their enroller will receive a 14-day sponsor move first as they enroll and again if they upgrade to a Wellness Advocate account after having a Wholesale Customer account for 90 days or more. If they subsequently convert their account back to a Wholesale Customer account and upgrade again to a Wellness Advocate account, their enroller will not receive another sponsor move.

Can a Wellness Advocate be converted to a Wholesale Customer after upgrading from a Wholesale Customer account?

Yes, if a Wellness Advocate decides not to enroll any team members, then they will eventually be converted back to a Wholesale Customer during their next renewal month. However, a Wellness Advocate can always opt out of this conversion process and decide to remain a Wellness Advocate.

As an enroller, why would I enroll a Wholesale Customer?

Wholesale Customers contribute to your team in many of the same ways as Wellness Advocates, and have additional advantages:

- Wholesale Customers can help you qualify for ranks and bonuses just as Wellness Advocates, including Power of Three and Fast Start.
- By signing up downline members as Wholesale Customers, you can better distinguish between users and builders on your team and support them accordingly.
- Wholesale Customers who upgrade their accounts to Wellness Advocate Accounts at least 90 days after signup will be eligible for an additional 14-day sponsor move.
- Social Security Numbers are not required to sign up a Wholesale Customer Account

Is the enroller notified if a Wholesale Customer upgrades to a Wellness Advocate account?

Yes, the enroller will receive an email whenever an enrollee upgrades their account from a Wholesale Customer Account to a Wellness Advocate Account.

Can a Wholesale Customer transfer into a Wellness Advocate position?

In select cases a Wholesale Customer may be allowed to transfer into a Wellness Advocate position. If the position they wish to transfer into is underneath the same enroller, then they may be allowed to transfer into a Wellness Advocate position with placements approval.

Can a Wholesale Customer purchase more than $5,000 in a year?

No. A Wholesale Customer purchasing more than $5,000 a year is considered to be a business, and therefore must be a Wellness Advocate. Any account with annual purchases over $5,000 must be reported to the IRS, so a Social Security Number or other Tax ID is required for these accounts.

Can a Wholesale Customer be placed anywhere in an organization?

Yes. A Wholesale customer can be sponsored under any Wellness Advocate in the enroller's organization.

Can a Wholesale Customer resell dōTERRA Products?

No. Wholesale Customers cannot resell dōTERRA products. This customer type is defined as purchasing product for personal use only. If a Wholesale Customer wants to resell products they must first upgrade their account to Wellness Advocate.

When the transfer is complete Rachelle will be able to see all my team in her downline and will now hold my rank, my position and my enrollments. If you are unsure of this process at any stage please call your account manager as it is always easier for us to walk you through the process that to try to rectify any errors if we can at all! REMEMBER an account transfer is a gift. When putting a new member in to an existing position make it clear to them that this is the case. Ensure they are ready to take on the responsibilities of the team already there. Offer them training prior to stepping into that role, and give them understanding of what it is like to be a leader in your team.

We love to be kept in the loop of what is happening with you, your team and your business so we can assist you in the most optimal way!

Tip – Account Management

Today's tip is in regards to contacting the Account Management team. We do not like missing any of your calls but if we do it's really helpful for you to leave a voicemail message with your full name, phone number and brief message to assist us with getting back to as quickly as possible. Also be mindful that when you are emailing your Account Manager to put in names/ID numbers screenshots if needed to be assist us with helping you with your enquiry

Checking Ranks

Today's Education is two-fold, using the same tool in the Virtual Office.

Firstly we are going to go through how to check rank- this is helpful for checking ranks for the previous month in case of a possible rank drop.
Secondly we are going to use this same tool to assist in rank advancement and identifying what requirements are still needed to reach the next rank.

Go to Dashboard Tab in your Virtual Office and in the middle column we are looking at the heading of Qualifications.

To check your rank for the previous month, change the Period in the drop down box - so for May, I'm going to change the Period to reflect 05/2017.

Then change the Rank in the drop down box to reflect your finished rank for that month.

The qualified legs are displayed as people icons directly below the drop down boxes. If they are reflecting the colour blue when you select a rank from the drop down box above, this means those Wellness Advocates have achieved that qualifying rank.
For example, if I've selected Silver in the Rank drop down box, the 3 qualified legs of Elite should be showing as blue - meaning I have ranked at Silver in May, and those qualifiers have ranked at Elite in May.

We would recommend all leaders teach this education training to their teams and encourage all members to create a healthy habit of regularly checking your rank, in the first two weeks of each new month, for the previous month, prior to commissions being paid out on the 15th.

On to our second way to use this same tool - using the drop down boxes again but here we're checking for rank advancement.

For example - If you are wanting to rank advance from Silver to Gold in June, change the Period first, then change the rank.

The process:

1. Enroll the new Member through your Virtual Office or Member Services. They need to be enrolled with the SAME enroller and sponsor as the member transferring out.

2. Encourage the member to enroll with at least a 100pv order, as that order will turned into a LRP order by placements.

3. Next both parties need to sign the Account Transfer form. Either pen to paper OR docusign (this is the only form of electronic signatures dōTERRA will accept). Then SUBMIT to placements the same day as the enrollment of the new member is processed. Placements do offer a 3 day grace period.

4. In your email include the new members name and ID for placements.

5. And feel free to copy your account manager in.

Extra Info:

1. Placements do not process account transfers between the 1st and 15th of the month, as this can effect volume for the previous month.

2. The person transferring IN will take over the transferor's position, rank and downline including enrollee's.

3. Points, percentages, AR balance and volume will NOT transfer to the new member so encourage the transferor to use them before signing the paperwork.

4. Fast Track enrollment orders CAN NOT be changed to LRP orders so the new member would need to process an additional 100pv standard order for Placements to change to an LRP order.

5. The person transferring out will not be able to have any access on an account for 6 months. This includes address, name or cc. If they would like product they are able to order through a retail account.

EXAMPLE:

Let's say I am happy to leave my account. You have found Rachelle, who is keen as punch to step into that position and take on the responsibilities of leader my team. My current enroller is you and my current sponsor is Deb. I would need to be willing, happy and consenting to leaving my position and account. Rachelle would also need to willing, happy and consenting to step into my account. I would need to use any or all of my points and AR before signing the paperwork as Rachelle as that will not be transferred to Rachelle.

BEFORE YOU PROCESS THE ACCOUNT TRANSFER, YOU OF COURSE CALL YOUR ACCOUNT MANAGER TO CHECK IN AND DOUBLE CHECK THE PROCESS.

You enroll Rachelle through your Virtual Office (or Member Services), with you as the enroller and Deb as the sponsor. And take note of Rachelle's new member ID.

Then you have myself and Rachelle fill out the account transfer form (which you found under the tools tab on dōTERRA every day).

Once that is filled out you email the form to placements@doterra.com. In your email you include Rachelle's full name and new Member ID. And of course you copy your account manager in.

Primary and Co-Applicants

A Primary Applicant is the person whose name is on the account and is the name that is associated with the address, email and government ID (ABN in Australia) on the account.

A Co-Applicant is a second person on the account, such as a spouse or a business partner.

Co-applicants can be added at the time of enrolment or at a later date.

If it happens at a later date here is what the primary account holder needs to do.

They need to send in 2 forms.

1. Account Information Change form – filling in the section "Adding a Co-applicant" and signing the bottom of the form.

2. Wellness advocate agreement form – this needs to be updated with both the current account holder and the new co-applicants details.

These forms can both be found on the dōTERRA every day page under the tools tab in the forms section.

The forms need to be sent to dataentry@doterra.com

Removing a co-applicant.

If a co-applicant wishes to leave the account, here is what the primary account holder needs to do. Again they need to send in 2 forms.

1. Account Information Change form – filling in the section "Adding a Co-Applicant". You can cross out the adding and write removing on the form for clarification and signing the bottom of the form – BOTH primary and co applicants need to sign when removing a person off the form.

2. Voluntary Termination Form with the co-applicants signature.

These forms can both be found on the dōTERRA every day page under the tools tab in the forms section.

The forms need to be sent to dataentry@doterra.com

If a member would like to switch the position of the Primary and Co-applicant there are 3 forms that the Primary Account Holder needs to send in dataentry@doterra.com.

A primary and co-applicant and ONLY switch if they were placed on the account at the time of enrolment.

1. Wellness Advocate Agreement form – this needs to be filled in with the current coapplicant's details.

2. Account Transfer Request Form – filling it out as it currently and then in the transferee part as the account wants to be.

3. Account Information Change Form – Switching the account holders section.

These forms can be found on doTERRA everyday site under the tools tab in the forms section.If you have any questions or doubts about this process, please call your account manager to talk it through. It's always easy as some errors are not always fixable.

Tip

Today's tip is just come clarification surrounding wording when emailing the Placement team and the Account Management team.

REACTIVATION- when a member has not had any activity on their account for over 6 months they can request to reactivate.

ACCOUNT TRANSFER- An Account Transfer is when you can transfer a new member into an existing position.

ENROLLER CHANGE- An enroller change is when you need to hand over enrollership of one of your enrollments.

When emailing into either Placements or Account Management using this wording is really helpful so we can have an accurate and prompt response.

Terminated Accounts

If a member wishes to terminate their account they must do so by completing a Voluntary termination form and then submitting the form into our Placements team via emailing placements@doterra.com.

Wellness Advocates may-

Request to have their account terminated after 6 months of inactivity; however, their account will not automatically terminate after 6 months.

If, after 6 months, the member wishes to terminate their account, they will need to email Placements with their request. Placements will calculate 6 months of inactivity based on the order history and not the date the voluntary termination form was received.

If the member does not request to terminate after 6 months, their account will remain at a suspended status until the account automatically terminates after 12 months.

One important thing to be mindful of is that when members move into a Terminated Tree, either at a 6 or 12 month point, their downline will roll up. For example- let's say I am on your front line and I have had 12 months of inactivity then I would move into a Terminated Tree but then what would happen to my downline? MY DOWNLINE WOULD ROLL UP. So my frontline leaders will become your frontline leaders.

Also when a member moves into a Terminated Tree you will no longer be able to see them in your tree or have access to their contact information via your Virtual Office.

Please note that even if a member has moved out of your team and you can no longer see them in Virtual Office that doesn't mean there account no longer exists. doTERRA can still see the members account and they can reactive that account by emailing Placements. They do not create another account re enrolling as this will be seen as a duplicate account which is against policy.

If you have any questions surrounding what I have just ran through, please reach out to your Account Manager and they will be happy to answer any questions you may have.

Tip – Account Management

One of the benefits of being a leader with dōTERRA is that you have access to the Account Management Team.

The Account Management team is here to assist and support you with your dōTERRA business and journey.

We can help you with:

- Goal Setting
- Explain and help maximize the compensation plan,
- Rank Qualifications,
- Commission Inquiries.
- Assist Silvers and above with their Personal Accounts.

The best way to contact your account manager is via their email or direct line. If you are unsure who your account manager is or their contact details, you can email through to leadershipaustralia@doterra.com or call 03 8540 3105.

Account Transfers

What is an Account Transfer?

An Account Transfer is a process where by a current Wellness Advocate is happy to step away from their account and a BRAND NEW enrollee steps into that position.

Account Transfers can be a positive thing for your business, but they do have a very specific process and one that if isn't followed correctly, may not be able to be rectified.

What do you need?

1. Account Transfer Form (found on the tools tab of dōTERRA everyday)

Who can transfer in and out?

2. An account transfer can occur between someone who is happy to leave their account position (the Transferor) and a BRAND NEW enrollee (he transferee).

3. Both parties need to consent and sign the paperwork.