

## Business Intelligence Solutions

Use the SUMMIT Intelligence add-on option and the Executive and Regional Information Systems as fast, flexible ways to access the wealth of information SUMMIT V® stores.

## Summit V Core Features

Genealogy Management  
Commissions and Bonuses  
.Net Commission Programming Engine  
Promotions and Incentives  
Sales Order Processing  
Sales Tax Management  
International Business Module  
Executive Information  
Customer Service  
Inventory Control  
Autoship for Recurring Orders  
Product Returns and Exchanges  
Party Plan  
Accounts Receivable  
Financial Journal Reporting  
System Security  
Online Documentation  
Plus: Integrated Web Solutions

## Contact Information

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# Summit V®

standard reports

## Accounts Receivable

Posted Invoice Adjustment  
Detail [Adjustment] by Date;  
Distributor; GLA; Reason Code  
Invoice  
A/R Statement  
Invoice Activity  
Invoice Aging  
Invoice Aging by Invoice Date  
Invoice by Invoice Number;  
Distributor Name; Invoice Date  
Final Deposit  
Payment Batch  
Payment by Payment Date; Post  
Date; Distributor; Payment Type  
Unposted Payment by Payment  
Date  
Credit Transfer by Distributor; by  
Accounting Date  
Credit Transfer Batch  
Posted Credit Transfer  
Available COA by Distributor; by  
Reserve Code  
COA History by Distributor; by  
Reserve Code  
COA Activity

## AutoShip

AutoShip Order Summary by  
Warehouse; by Release Date  
AutoShip Order Volume Detail  
by Distributor  
AutoShip Order Summary by  
Type by Release Date; by  
Release Date by Type; by  
Release Date by Program; by  
Program by Release Date

## Commissions

Unposted Adjustments by  
Distributor; by Commission Date  
Unposted Adjustments Detail  
Posted Adjustments by  
Distributor ; by Commission  
Date  
Commission Statement  
Print Checks  
Preliminary Check Register  
Final Check Register  
Check Summary

Outstanding Check Register  
Voided Check Register  
Commission Audit by  
Distributor; by Document  
Commission Activity Genealogy  
Commission Due  
Distributor Negative Balance  
Commission Volume Detail by  
Distributor ; by Hold Code  
Historical Commission Volume  
by Distributor; by Commission  
Period; by Commission  
Category Code  
Commission Volume Detail by  
Commission Category Code  
Commission Volume Transfer  
Commission Exemption  
Promotion/Demotion  
Pending Commission  
Collection; Disbursements  
Commission Activity by Name;  
by Title  
Commission History by  
Distributor; by Period; by  
Commission Code  
Top PV Distributors  
Top GV Distributors  
Top Sponsoring Distributors  
TFC Audit  
1099 Audit  
T4A Audit

## Credit Card Processing

Credit Card Transaction Review  
Credit Card Transaction  
Credit Card Transaction by  
Sales Order  
Credit Card Preliminary Posting  
Credit Card Posted  
Credit Card Posted Summary  
Call Center Report

## Customer Service

New Contacts by Distributor  
Name; by Employee Name  
Open Contacts by Distributor  
Name; by Employee Name; by  
Reminder Date/Priority; by  
Employee/Reminder Date  
Closed Contacts by Employee  
Name; by Distributor Name  
Contact Summary by Close  
Date; by Contact Date; by  
Employee/Close Date; by  
Employee/Contact Date  
Contact Summary by Type  
Contact Feedback Form  
FAX Response Form

## Distributor

General Information Genealogy  
Distributor by Name; by Title  
Code  
Distributor Information Form  
Downline List Maker

## EFT

Distributor EFT Information  
Print PIN Notification Forms  
EFT Detail Draft by Distributor  
EFT Detail Prenote by  
Distributor  
EFT Detail Direct Deposit by  
Distributor  
EFT Detail Return Payment by  
Return Date  
EFT Detail Non-Transferred by  
Distributor  
EFT Detail Draft Review by  
Distributor  
EFT Summary by Transaction  
Date; by Transfer Date  
Direct Deposit Review  
Direct Deposit Information

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The **ideal enterprise solution** for  
the **direct selling industry**

## General Ledger

Preliminary GL Detail; Summary  
GL Summary  
Chart of Accounts

## Incentives

Incentive Program Master by  
Program ID; by Name; by Status;  
by Begin Date

Incentive Program Period Run  
Data

Definition by Program by Rule  
Type and Number

Point Adjustment by Program ID  
and Distributor ID; by Distributor  
ID

Incentive Target by Program ID;  
Incentive Target by Distributor ID

Exemption by Program ID;  
Exemption by Exempt Code;  
Exemption by Distributor ID

Audit by Program ID; Audit by  
Distributor ID

Commission Transaction by  
Distributor ID

Point Summary by Point Code; by  
Program by Distributor ID

Point Summary by Program by  
Point Code; by Rule Number

By Distributor ID by Incentive  
Period

By Distributor ID by Program,  
Period and Rule

Point Code by Point Code; by  
Type Code; by Program ID

Message Master by Message  
Number

Award Master by Award Code; by  
User Type Code; by Award Type

Award Detail by Award Code

Award Redemption by Award  
Code and Distributor; by  
Distributor and Award Code

Award Redemption Summary

Batch Redemption

Batch Redemption Stock; COA;

Comments Inventory

Unconfirmed Packslip

Detail Shipping

Shipping Summary by Stock  
Number; by Carrier

Shipment Cost Analysis

Stock Reorder by Vendor; by  
Stock Number

Quantity on Hand by Stock  
Number

Stock Count Worksheet; by Bin  
by Stock Number; by Stock Count  
Group

Stock History by Warehouse

Inventory Form; Master

Inventory Transactions by Stock  
Number

Value of Inventory

Stock Count Variance

Kit/Serial Control by Customer; by  
Distributor; by Stock Number by  
Customer; by Warranty Expiration  
Date; by Stock Number by  
Customer by Serial Number by  
Customer; by Stock Number by  
Serial Number by Distributor

## Returns & Exchanges

Returns & Exchanges Authoriza-  
tion Form; by Entry Date; by Post  
Date (Detail, Summary or both)

Returns & Exchanges Refundable  
Amount by Entry Date

Unposted Returns & Exchanges  
by Entry Date

Returns & Exchanges by  
Distributor; by Customer; by  
Stock Number

Refund Credit Note

## RIS

Region Information by Level/  
Assigned To

Region ZIP Code Assignments by  
Assign To; by ID

Distributor Counts by Region/  
Level

Sales Order EIS by Region/Level

Sales Order by Region/Level

## Sales Order

Sales Order Form

Sales Order by Order Date

Sales Order by Entry Date

Sales Order by Invoice Date; by  
Distributor, by Customer

Sales Order Validation by Entry  
Date; by Invoice Date

Sales Order Backorder

Sales Order Stock Summary by  
Order Date

Sales Order by Stock Number  
and Order Date; by Entry Date  
and Stock Number; by Invoice  
Date and Stock Number

Unpackslipped Sales Order

Backorder Packslip

Packslip Validation

Shows by Hostess Name; by  
Distributor Name; by Show Type;  
by Show Date; by Order Date

Bookings by Booking Date; by  
Distributor Name; by Hostess  
Name

Gift Certificates by Original Sales  
Order; by Expiration Date; by  
Redemption Date; by Gift ID; by  
Issue Date; by Redemption Sales  
Order

Outstanding Gift Certificates

Tax Information

Tax Exception

## Security and Control

Audit Detail by File Name; by  
Attribute; by Employee Name

Printers by Location by Printer ID;  
by Printer ID; by Available  
Stationery

Employee by Branch Name; by  
Employee Name

Employee Transaction by Branch  
by Employee; by Branch by  
Program; by Employee; by  
Program

Port by Branch by Department;  
by Employee; by Location; by Port  
Number

Group Security by Group ID

Prompt Security

Menu

Program by Module; by Feature

Department by Branch

E-mail group by Description/  
Employee

Error Log by Employee/Program

Chart of Accounts

Reason Codes by Category

Warehouse by Country