UpLine

Software for Network Marketing and Direct Sales Distributors

Income - 'The 40 Year Plan'   Income - Your own business
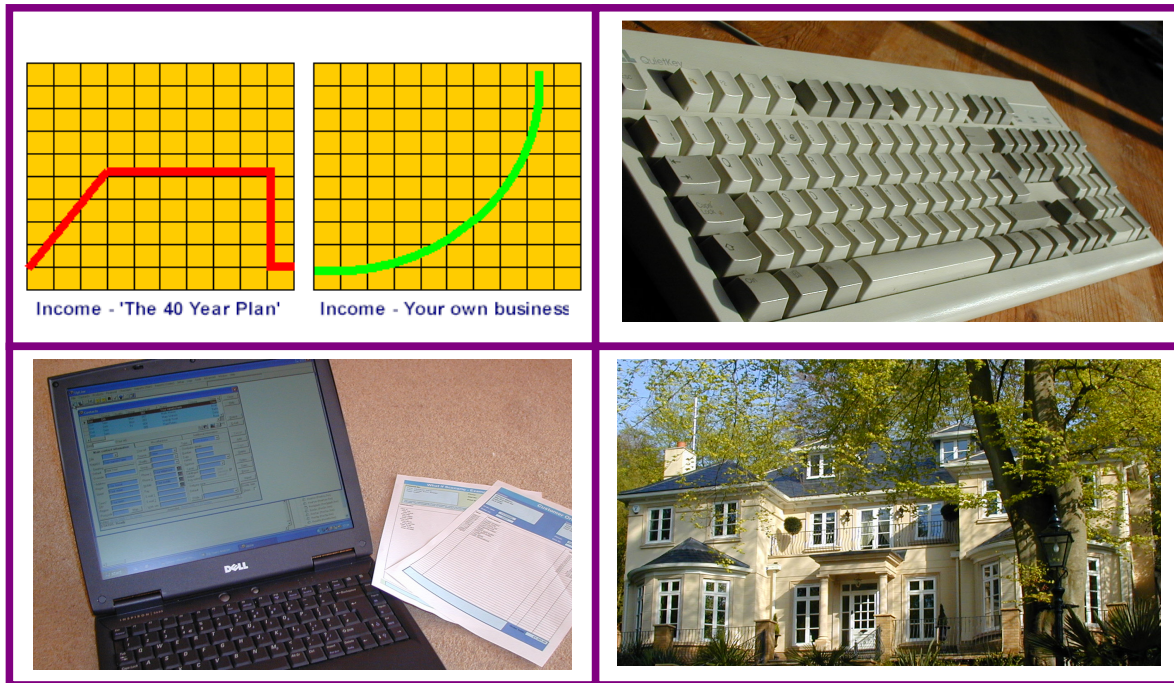
Direct selling is a growing industry. More individuals and couples are trying to find ways of subsidising their income by starting their own direct selling business. Others have higher goals and want to break free from the constraints of traditional employment and take full control of their own destiny by making their new business such a success that it becomes their sole source of income.

Whatever your ambitions, achieving that extra income will not come without some hard work. Our **UpLine** software is designed to keep that hard work to a minimum – whether your business is based on a **Network Marketing** model, **Party Plan** or just simply retail profit from **Direct Catalogue Sales**. **UpLine** is designed to help with:

- Introducing others to the same business opportunity
- Supporting fellow distributors
- Making dynamic presentations to prospects
- Delivering products & catalogues to customers/areas
- Managing, collating & analysing customer orders
- Organising marketing campaigns

- Organising events or parties
- Recording & monitoring retail profit, bonus & other income
- Recording & monitoring business related expenditure
- Maintaining a busy business diary
- Projecting income based on different expansion scenarios
- Bulk mailing & e-mailing

UpLine – the key benefits:

- Categorise your contacts – customers, downline, prospects etc
- View, navigate & print your downline hierarchy/genealogy
- Print or email personalised mailings to contacts
- Use the diary to trigger reminders & record key activities
- Use 'incentive scores' to monitor progress against targets
- Record & report business income and expenditure
- Over 50 built-in reports available – or generate your own
- Devise and save 'what if' scenarios for a downline hierarchy
- Organise your time & tasks with checklists & schedules
- Print your own catalogue collection slips or for another distributor
- Catalogues - build your own or import from supplier
- Use 'drop zones' to organise efficient delivery and collection
- Enter and store your customer orders offline
- Collate multiple orders to single supplier order
- Customisation – create your own reports & contact fields, modify document formats, adjust and save multiple 'window views'

UpLine – what users say:

"..fantastic and better than I could have imagined"

"Love the help file"

"I did not appreciate how powerful this feature (delivery zones) can be. Well done!"

"The Income / Expenditure feature of your program is brilliant"

"Simple to use and powerful enough for both the beginner and more experienced Network Marketer"
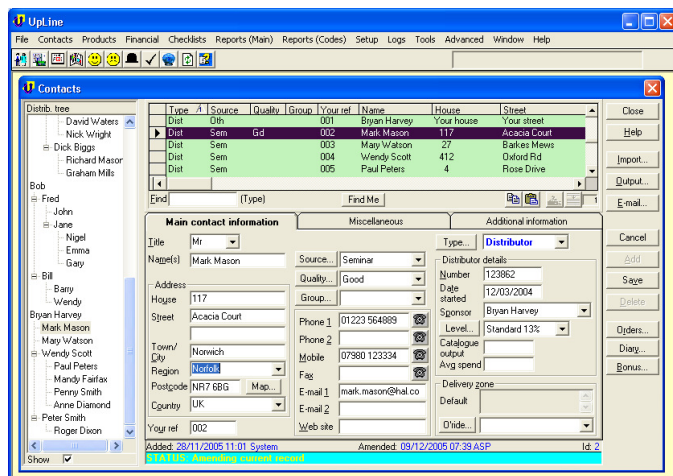
"..some brilliant features that left me quite in awe"

"The What-If scenario tool is excellent"

"The features just get better and better"

"..this is a quality program"

Contents

Your contacts **are** your business. They are the customers who buy the products, the distributors in your group vital to your success & growth and the prospects who may become your customers or future group members. With **UpLine** you can:

- Handle all types of contacts including *contact types* **you** define
- 'Rate' contacts using your own *quality codes*
- Use *source codes* to record how the contact was originally made
- Use *group* codes to allocate contacts to a 'campaign' or party
- Group, sort, view, print or email contacts by name, *type*, *quality*, *source* or almost any other criteria including custom criteria
- Direct dial contacts with one click using your modem
- Automatically generate contact records for a range of addresses
- View customer orders, relevant diary entries and distributor bonus & volume details
- View your distributor 'tree' (your group's genealogy) in an intuitive hierarchical format or 'traditional' chart
- Import contacts from other applications

Email, letters, forms, labels, reports

With **UpLine** you can print:

- Address labels
- Personalised letters
- Catalogue drop-off slips
- Monthly business expenditure
- 50+ standard reports
- Customer & collated orders

and...

- Build & store your own reports
- Send a standard email to selected contacts
- Adapt form designs using, e.g., Microsoft ® Word
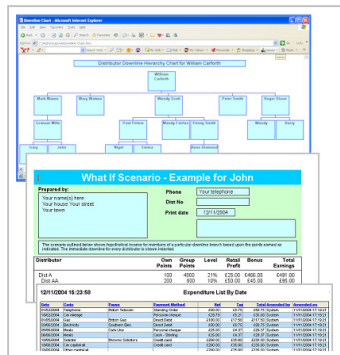
Your business diary

You can use the **UpLine** diary for many different purposes:

- To remind you to make calls, attend seminars, collect catalogues
- Record details of meetings or telephone conversations
- Cross reference emails received
- Remembering anniversaries, birthdays and special dates
- Attach incentive scores to tasks to monitor performance

And once details of a recurring event (e.g. tax return deadline, business year end, 4 week period end) have been entered once, you can rely on **UpLine** to remember them each year/period thereafter.

Income, expenditure & tax

You can use **UpLine** to track all your business income and expenditure and produce reports listing and totalling figures for any period you choose. If you are a UK taxpayer, there is further tax related capability for storing data used in preparation of tax returns.

Planning, projecting & organising

Does your business involve:

- Scribbling diagrams to demonstrate to fellow and prospective distributors the heights they can achieve?
- Preparing business presentations?
- Projecting group income based upon different growth scenarios?

The 'what if' planning tool can be used to construct, demonstrate, print, adjust, save and retrieve such scenarios/plans. Also, you can use the 'checklist' feature to, for example:

- Plan a schedule for an evening with tasks for each time slot
- Prepare a list of questions for a phone call and store responses
- Drive the agenda for a meeting
- Store and check off tasks on a simple to do list

Orders, catalogues and delivery

Perhaps you can already key orders directly into your supplier's web site? But do you have a record of them and can you review purchasing habits, product popularity and catalogue popularity? With **UpLine** orders and catalogues, you can:

- Enter, modify, print and interrogate contact order records
- Load catalogues from CD, PDF, web, comma delimited files or load on-the-fly as you enter orders †
- Collate multiple orders into a single supplier order
- Copy and paste orders to duplicate an order then modify
- Manage multiple catalogues – e.g. summer, Christmas etc
- Put 'self-help' books, tapes & tools in a dedicated catalogue
- Generate product and catalogue popularity reports
- Map 'your patch' into drop zones then use to organise catalogue drops, collection & product deliveries
- Let **UpLine** deduce the drop zone to which a contact belongs
- Build your own library of maps and link these to your drop zones
- Let **UpLine** deduce points/volume figures from retail †

† supplier dependent

Looking forward

We don't want to leave it there! There are other features we are considering for future inclusion including:

- Production of UK tax return forms (sample in current version)
- Further party-planning & campaign management features
- Automated order uploads to supplier web sites
- Extended import and export capabilities

But we are interested in your ideas too. Please feel free to contact us with your suggestions via email using the contact details provided below.

Phase Software - the company

Phase Software is a professional UK-based software provider that has been offering sophisticated software solutions and support for over two decades.

In developing software for corporate customers, we have built an extensive portfolio of software tools that we have used to develop **UpLine**. The result is a robust and comprehensive software package with many features that would normally only be found in considerably more expensive commercial applications.

What now?

UpLine is available for purchase and direct download on our website – please visit the site for the latest prices. A free 30 day trial is also available.

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