PULSE FREQUENTLY ASKED QUESTIONS (FAQs)

General Questions

1. What is Pulse?
   a. Pulse is a state-of-the-art web-based business management system designed to help you gauge current performance, analyze business results, generate and manage leads, target messages to specific Consultants based on criteria you select, and drive sales and Consultant volume.

2. How much does Pulse cost?
   a. Every Consultant will get a 30-day free trial of Pulse when they enroll. After the trial, the cost to continue with this complete business management application, e-mail account, interactive reporting and two websites is $24.95 per month with 20 SV that counts toward the monthly 100 SV requirement for commissions.

3. What is offered with the paid version of Pulse?
   a. Pulse includes two Personal Websites (PWS) designed to target Customers and Prospects, a professional e-mail address, advanced interactive business reporting with easy to understand graphs and charts, timely alerts, and other custom business tools.

4. Is Pulse required?
   a. While we recommend you subscribe to Pulse to better manage your business, you are able to conduct your Rodan + Fields® business without purchasing Pulse. You are able to use www.rodanandfields.com to enroll Consultants and sell products online. It is imperative that you make sure all of your Customers and Consultants identify you as their Sponsor and that they log in so we can ensure their sales and enrollments are attributed to your account.

5. How do I subscribe to Pulse?
   a. New Consultants can subscribe to Pulse as part of enrollment. All Consultants may subscribe to Pulse at any time by logging into Pulse and clicking on the My Account tab.

6. Can I edit or cancel my Pulse subscription at anytime?
   a. You may edit your Pulse subscription at anytime by going to the My Account tab of Pulse or by contacting Sales Support. However, you may only cancel your Pulse subscription by contacting Sales Support.

7. What is my Pulse login information?
   a. Your Pulse login information is the same login and password that you currently use on the corporate site and your PWS sites.

8. How do I change my Pulse login information?
   a. You can change your login ID and password by going to the My Account tab within Pulse. Click on the “Change My Security Settings” link on the left hand side of the page.
9. How do I update my contact information?
   a. You can change your contact information displayed on your Personal Websites on the My Account tab of Pulse. Click on the “Edit” link in the “My Primary Account Record” section of the My Account Overview page to update and save.

10. What is my Pulse e-mail address?
   a. Your e-mail address is the first part of your current PWS URL @myrandf.com. For example: If your PWS URL is: http://susieq.myrandf.com your e-mail address is susieq@myrandf.com

11. How do I log in to Pulse?
   a. You may access Pulse by clicking on http://myrfpulse.com. You can also access Pulse through your PWS by logging into your PWS and clicking on the Check My Pulse tab.

12. How often is the information on Pulse updated?
   a. Most data in Pulse is updated in near real time. Please note that there may be some server delays in updating your information. For example, it may take up to an hour for Pulse to show your order if you’ve just placed it. To ensure that you are always viewing the most up-to-date data, refresh your page if you’ve been viewing that page for a while.

13. Can more than one person use a single Pulse account?
   a. Yes, more than one person can access Pulse at the same time; however, only one person at a time can make edits in the account (i.e., adding Contacts, sending e-mail, etc.). If you are sharing your Pulse account with another person, please be advised that Pulse contains privacy sensitive information including your billing information.

14. Are there any technical or system requirements for Pulse?
   a. Pulse requires an Internet connection and a Web browser. Pulse works on most browsers and computers (including Macs) and other Web-enabled devices such as smart phones and tablets.

15. Can I get Pulse on my smart phone?
   a. Yes. You can access Pulse on any smart phones, tablets and other Web-enabled devices. Please note that Pulse is optimized for Web browsers on computers so some features may not be completely compatible with other devices.

16. What types of support are available for Pulse?
   a. Pulse has several support mechanisms available:
      i. Online Tutorials – Short tutorial videos show you how to use select features of Pulse. These tutorials can be found in the Biz Dev Library of Pulse.
      ii. Pulse Training Documents – Pulse User Guide and Frequently Asked Questions (FAQs) on each section of Pulse are available in the Biz Dev Library of Pulse.
      iii. Sales Support – As always, your Sales Support Team stands ready to support you at 1415-273-8000 during published business hours.

**Technical Questions**

1. Can I access Pulse from my smart phone such as an iPhone or Andriod?
a. Yes. You can access Pulse on any smart phones, tablets and other Web-enabled devices. Please note that Pulse is optimized for Web browsers on computers so some features may not be completely compatible with other devices.

2. Can I forward my Pulse e-mail to another account?
   a. No. You can only access your Pulse e-mail online through Pulse.

3. What browsers can I use with Pulse?
   a. Pulse works on most browsers. If you have any technical difficulties accessing Pulse on your computer, please contact Sales Support.

4. Are there any technical or system requirements for Pulse?
   a. Pulse requires an Internet connection and a Web browser. Pulse works on most browsers and computers (including Macs) and other Web-enabled devices such as smart phones and tablets.

5. Are there any other technical requirements for Pulse?
   a. Pulse also uses pop-ups. Please disable any pop-up blockers for the Pulse website. Please refer to the Pulse User Guide for details on how to disable pop-up blockers just for Pulse.

6. Can I synchronize my Calendar or Contacts with my mobile phone?
   a. No, synchronization is not available with this version of Pulse.

7. Can two people be logged into a single Pulse account at the same time?
   a. Yes, two people can be logged into Pulse at the same time; however, it is critical that only one person at a time is making edits (i.e., creating or updating Contacts, managing eComms). Also, please note that if someone reads an e-mail from one login, it will appear as already read in the other login.

8. Will Pulse run on a Mac?
   a. Yes, it will run on a Mac.

9. My Pulse is running slowly, what can I do?
   a. There are many things that will cause a computer to run slowly, including your computer itself, your operating system or other software, your Internet connection or Internet service provider. If you have checked and there are no problems with your home computer setup, contact other Consultants to see if they are having a similar problem. If others are having similar issues, then contact Sales Support.

10. My data on Pulse is not updating, what should I do?
    a. On rare occasions, the computer system will run slowly and not update information immediately. Please contact Sales Support to report the issue.
1. What is a Dashboard?
   a. The Pulse Dashboard is the first screen you see after logging in. It represents your “launch pad” for all of your business tools.

2. What is “My Why”?
   a. You decided to start your own business for a reason. This is your “Why.” It is what keeps you moving forward despite obstacles and roadblocks that are bound to arise on your journey to success. At the heart of Pulse is your “Why.” You are able to customize your front page with an image that represents your “Why” so you are reminded why you are building your Rodan + Fields® business every time you check your Pulse.

3. How do I update “My Why”? 
   a. To update your photo, place your mouse over any part of the existing photo then click on the “Change Photo” link. To update your text, place your mouse over any part of the existing text then click on the “Change Text” link.

4. What do the colors mean on my Sales Volume graph & PSL1V graph?
   a. The colors green, yellow, and red give you a quick indication of your current volume qualifications status. If your SV or PSL1V graph shows a green, it means that you’ve met your respective volume requirement. If you see a yellow, it means that you have not currently met your volume requirement but you will meet it once the scheduled Autoships process successfully. If you see a red, it means that you will not meet your volume requirement for the month unless you acquire additional volume.

5. Why is my Sales Volume graph yellow?
   a. It indicates that although your current qualification SV is below 100, once your scheduled CRP Autoship processes successfully, you will be at or above 100. Since there’s a chance that the scheduled CRP could fail, you should check back after your CRP date to make sure it processed successfully.

6. How does Pulse “estimate” my PSLIV?
   a. When you click “Estimate My PSLIV,” Pulse displays your estimated PSLIV for the month if all scheduled Autoships from your Personally Sponsored Preferred Customers and Personally Sponsored Consultants and their Retail Customers process successfully.

7. Why is my PSL1V graph pointing to red?
   a. Your PSL1V for the month will be less than 600 (the amount needed to maintain Executive Consultant status) unless you acquire additional PSLIV.

8. What is the EC Leg Qualification graph showing?
   a. This graph shows you how you are tracking toward maintaining your title or achieving a new milestone. As Executive Legs qualify throughout the month, the achievement bar moves up. Your goal is to meet or exceed your performance last month, indicated with the light blue fill line.
9. Are Gracing ECs in my Personal Team counted in the EC Leg Qualification graph?
   a. If your Personal Team EC has satisfied his/her SV requirement and is using an available Grace to qualify for the PSL1V, that EC will count as an EC Leg for you starting on the 21st of the month. Additionally, any ECs in your Personal Team using an available Grace for their SV (and has satisfied their PSL1V) will be counted if their Downline EC has qualified for the month.

Alerts
1. Why am I seeing an urgent alert pop-up message when I log in to Pulse?
   a. You are seeing the urgent alert pop-up message because you have one or more of the following volume qualification alerts:
      i. Your SV is below 100 after the 20th of the month
      ii. If you are an EC+ and your PSL1V is below 600 after the 20th of the month
      iii. Your personal CRP has failed

2. How do I make the urgent alert pop-up message go away?
   a. By accepting the message, the pop-up message will go away and you will see the Dashboard of Pulse. The urgent message(s) will stay on the top of your Dashboard until the issues have been resolved.

3. Will I see the urgent alert pop-up message each time I log in to Pulse?
   a. No, once you have accepted the message, you will not see the pop-up message again unless a different urgent alert is present.

4. What alerts are available?
   a. There are two types of alerts on Pulse: urgent alerts and business alerts. Urgent alerts will be accompanied by the urgent alert pop-up message and will be displayed at the top of the Pulse Dashboard. Both urgent and business alerts will appear in the Alerts module on the left-hand column of the Dashboard until the issues have been resolved. For more detailed information, please refer to the Alerts section in the Pulse User Guide.

Performance – Overview
1. What reports are included in the Performance tab of Pulse?
   a. You can access your volume qualification graphs, your Road to RFx table and corporate reports including: Vital Signs Report, RFx Reports, Fast Start Reports, Autoship Reports, Promotions Report, Downline Report and Earnings Statement.

2. What do the colors mean on my Sales Volume graph & PSL1V graph?
   a. The colors green, yellow and red give you a quick indication of your current volume qualifications status. If your SV or PSL1V graph shows a green, it means that you’ve met your respective volume requirement. If you see a yellow, it means that you have not currently met your volume requirement but you will meet it once the scheduled Autoships process successfully. If you see a red, it means that you will not meet your volume requirement for the month unless you acquire additional volume.
3. What is the EC Leg Qualification graph showing?
   a. This graph shows you how you are tracking toward maintaining your title or achieving a new milestone. As Executive Legs qualify throughout the month, the achievement bar moves up. Your goal is to meet or exceed your performance last month, indicated with the light blue fill line.

4. Are Gracing ECs in my Personal Team counted in the EC Leg Qualification graph?
   a. If your Personal Team EC has satisfied his/her SV requirement and is using an available Grace to qualify for the PSL1V, that EC will count as an EC Leg for you starting on the 21st of the month. Additionally, any ECs in your Personal Team using an available Grace for their SV (and has satisfied their PSL1V) will be counted if their Downline EC has qualified for the month.

5. What information is shown on the Road to RFx table?
   a. The Road to RFx table shows your qualification data to help you track your personal performance toward achieving/maintaining RFx title and Road to RFx Car Incentive Program. Please see the RFx flyer in the Biz Dev Library of Pulse for more information and how to qualify for RFx and Road to RFx.

6. What is L1-L6 Volume?
   a. Since Organization Volume is constantly changing throughout the month as Executives promote and generations emerge and we can’t show that in real time, we have added L1 – L6 Volume to help you gauge your performance. In most cases, your Organization Volume is at least the amount of your L1 – L6 Volume but could be more.

7. How are L1 + L2 Volume & L1 – L6 Volume calculated?
   a. These qualification volumes take any Roll Arounds in your Organization into calculation so they are the sum of commissionable volumes of your levels, with Roll Arounds.

8. Can I see my current Organization Volume in real time?
   a. No. Since Organization Volume is constantly changing throughout the month as Executives promote and generations emerge, we can’t show that in real time. Instead, we have added L1 – L6 Volume to help you gauge your performance. In most cases, your Organization Volume is at least the amount of your L1 – L6 Volume but could be more.

9. Where can I see my Grace Balance, next available Grace Period?
   a. You can click on your own name in the Flat Downline Tree or the Graphical Downline and see Grace-related information (i.e., Grace Balance, EC Anniversary for next available Grace Period) on the Info Card.

10. Will my ECs that are using their Grace Period for their PSL1V count as a qualified EC in the current month?
    a. Yes. If your ECs are using their Grace to qualify for their PSL1V (and have satisfied their SV), they will be counted and shown as qualified ECs for you in the month they are using Grace, after the 20th of the month.
11. What filtering options are available on reports?
   a. Depending on the report that you are viewing, you have a number of ways to filter your reports. Most have the option to search by a name, filter by Commission Period, and additional filters that correspond to the report column headers. To view additional filtering options, click on the “View More Filter Options” link above the report.

12. Can I export reports to Excel?
   a. Yes. You can export any of your Performance reports into Excel. Click on the “Export to Excel” button above the report to export.

13. Can I export filtered reports?
   a. Yes. Only the filtered data will be exported in Excel.

14. Can you see roll arounds in my Organization?
   a. Yes. You can see Roll Aroungs in your Downline from the Flat Downline Tree & Graphical Downline. They are indicated by a square shape in the viewers.

15. Can you tell if I have any pending Roll Arounds (Roll Arounds in a timer) in my Downline?
   a. Yes. You can tell if you have a pending Roll Around in your Downline by viewing your Flat Downline Tree & Graphical Downline. Any pending Roll Arounds will be shown with a Triangle at the root level of your EC Leg. For example, if the pending Roll Around exists in the third level down in your organization, and your first level is not an EC, your L1 will be shown as a triangle, indicating that there’s a pending Roll Around in that leg of your Organization.

Performance – Flat Downline Tree

1. What is a Flat Downline Tree?
   a. Linear representation of your organization that displays all your Downline and how your Executive Consultants (ECs) are tracking toward re-qualification.

2. Who is included in the Flat Downline Tree?
   Your Flat Downline Tree includes all your Consultants and Preferred Customers in your Organization. It will also include Team members who have compressed or rolled up to you. If you have “lost” a Downline Leg due to a Roll Around, the Consultant you personally sponsored will remain in your reports but the remainder of the EC Leg will not be visible to you.

3. How do I drill down in the Flat Downline Tree?
   a. To drill down, click on an arrow to the left of your Team member’s name. This action will expand the Team member’s Organization to his/her next level. Repeat the process to drill further down in the Leg.

4. Can I expand or collapse all levels at once?
   a. No. You need to expand or collapse one level at a time. If you are looking for a specific person, you can use the search functionality to jump down to the person without expanding one level at a time.
5. How do I search for a Team member?
   a. You can search for a Team member by using the Search by Name feature. Start entering the name (either first or last) into the Search box and select the name from the Auto-fill drop down menu then click the Search button.

6. Why are there no names listed in the Auto-fill drop down menu when I search for a name?
   a. Make sure that you are spelling the name correctly. You can use either the first name, last name or both. Also, the drop down menu will only return names of individuals who are in your Organization. So if you are searching for an individual who is not your Downline Consultant or PC, the name will not appear.

7. I have searched for a name and selected it from the Auto-fill drop down menu but why can’t I see that Team member?
   a. You must click the “Search” button to initiate the search functionality.

8. Why can’t I see my Preferred Customers in the Flat Downline Tree?
   a. Make sure you have checked off the PCs display setting checkbox. By default, the Flat Downline Tree only displays your Consultants.

9. Why are my Consultants colored differently?
   a. Your Consultants are color coded to provide context for your Organization. Consultants who qualified as an EC+ in the previous month will start off the new month as a yellow circle. As the month progresses, their circle icon will change to green, orange or red. For detailed description of the legend, please review the color code section in the Pulse User Guide.

10. What is an Info Card?
    a. An Info Card contains detailed information on a Consultant or a Preferred Customer. It includes contact information, current performance information and title information for Consultants, and Autoship and Enrollment information. Additionally, it provides navigational links. For more information, go to the Info Card section of Pulse User Guide.

11. How do I see information about a Team member?
    a. You can click on a name and it will pull up the Info Card on that Team member.

12. How do I contact a specific Team member?
    a. Click on the Team member’s name to view his/her contact information on the Info Card.

**Performance – Graphical Downline**

1. What is a Graphical Downline?
   a. Visual representation of your organization that displays all of your Consultant Legs and how your Executive Consultants are tracking toward re-qualification.

2. Who is included in the Graphical Downline?
   a. Your Graphical Downline includes all your Consultants and Preferred Customers in your
Organization. It will also include any Team members who have compressed or rolled up to you. If you have “lost” a Downline Leg due to a Roll Around, the Consultant you personally sponsored will remain in your reports but the remainder of the EC Leg will not be visible to you.

3. What’s the difference between my Flat Downline Tree and Graphical Downline?
   a. The same information is shown in both views, the only difference is how they are displayed. Your Flat Downline Tree allows you to view your Organization in a linear structure, while your Graphical Downline allows you to get a bird’s eye view of your Organization.

4. Can I filter to only see my Executive Legs?
   a. Yes. As with the Flat Downline Tree, Graphical Downline results can be narrowed or expanded by using the Display settings. Uncheck the display checkboxes, then click the “Apply Filter” button to view only your Executive Legs.

5. How do I see my entire Organization, including my Preferred Customers?
   a. Check both the “PCs” and the “Non-Executive Consultants” display checkboxes to view everyone.

6. Are my Retail Customers included in this view?
   a. No. Only your Consultants and your Preferred customers are included.

7. How do I navigate to the next level?
   a. Clicking on the name of the Consultant/PC will bring up the Info Card on the individual where you can drill down into that individual’s Organization then click “Graphical Downline.”

8. How do I go back up a level?
   a. To go back to the Upline view of this member, click on the name of the Upline you wish to view in the breadcrumb in the top left corner. Note: Hitting the browser “Back” button will direct the Graphical Downline viewer to its default view (with you in the center), which may or may not be the page you previously were on.

9. Can I jump to Flat Downline Tree from the Graphical Downline?
   a. Yes. You can click “Flat Downline Tree” to navigate to that view.

10. Why does my L1, who is a Consultant, show up in my Executive Consultants view?
    a. The only time you would see a Consultant show up in your Executive Consultants view is if they are at the root level of an EC Leg with pending Roll Around(s). So even though that Consultant did not qualify as an EC for you, they are the root of an EC Leg until a permanent Roll Around occurs.

11. Why do I have some Team members show up as a triangle?
    a. A triangle indicates a Consultant (who is not an EC+) who is the root of an EC Leg in your Organization. While he/she is not an EC yet, they have a four month window to promote before the EC under them rolls around. During this four month window the Consultant at the root of the EC Leg will appear as a triangle.
12. What do the different colors mean on Team members showing up as a Triangle?
   a. The color of the Triangle indicates the qualification status of the EC in the Leg. If you have more than one pending Roll Around in that Leg, the color shown in the Triangle reflects the highest qualification status of the ECs in the pending Roll Around status.

13. What do Team members in Square mean?
   a. A Square indicates an Executive Consultant who has permanently Rolled Around in your Organization.

14. Why does my Team member who has rolled around a Consultant show up under the person he/she has rolled away from?
   a. If you have the “non-Executive Consultants” checked in the display setting, you are viewing all your Consultants in the full organization view that reflects the enrollment sponsor. To view just your EC Legs, make sure the “non-Executive Consultants” checkbox is unchecked.

15. Why do I see my Personally Sponsored L1 Consultant show up as a Black Circle?
   a. The Black Circle indicates that this Personally Sponsored Consultant’s Leg has rolled around you (this Leg is no longer part of your Organization but you still get your PSL1V & L1V from this individual).

16. Why do my Consultants show up with different colors?
   a. One of the most powerful features of the Graphical Downline viewer is quickly seeing the performance and qualification status of your Downline via the color and shape of the markers. Please refer to the 4.3.3: Understanding The Shape & Color Of Graphical Downline in the Pulse User Guide for detailed explanation.

17. How does it help me grow my business?
   a. The Graphical Dowline allows you to easily see where your organization is strong, where you are vulnerable and areas for growth. This is the ideal tool to help you coach leaders on where to focus their efforts for best results.

18. When I click on the Circle, why doesn’t it open up the Info Card?
   a. To view the information of a member in your Downline, click on the member’s name, not the Circle.

19. Can I look up order history on my Team members?
   a. Yes, click on the Team member’s name to bring up the Info Card on that individual. If he/she is in your Personal Team and the link is present, click “Order History.”

20. Can I e-mail a specific Team member?
   a. To e-mail a particular member in your Downline, click on the member’s name. Once the Info Card pops up, click on the e-mail address link. You will be directed to the EComms tab to compose your e-mail.
21. How can I e-mail my Downline?
   a. There are several ways to e-mail your Downline: 1) You can e-mail all your Consultants as a group by going to the Vital Signs report and clicking the “E-mail All In This Report” button; 2) to email all your personal Preferred Customers, use the “E-mail My Preferred Customers” button in the Contacts tab; and 3) if you only want to e-mail your Personal Team Consultants, use the “Email My Personal Team Consultants” button in the Contacts tab.

22. How can you tell if I have any pending Roll Arounds?
   a. It will be indicated by a Triangle. (Please see the qualification Status Colors section of the Roll Around Shapes in section 4.3.3: Understanding The Shape & Color Of Graphical Downline in the Pulse User Guide.

23. How can I tell if I have Roll Arounds?
   a. If your non-Personal Team EC has rolled around her/his direct Sponsor, you will see her/him appear as a Square. If your Personally Sponsored EC has rolled away from you, then he/she will appear as a Black Circle indicating that his/her Leg has rolled around you (this leg is no longer part of your Organization but you still get your PSL1V & L1V from this individual.)

24. Will my Downline count as an EC Leg for me if he/she graces on PSL1V?
   a. Yes. If she/he has an available Grace and has satisfied her/his SV requirement, she/he will count as an EC Leg for you. You will see her/him appear as an Orange Circle after the 20th of the month indicating that he/she is using her/his only Grace and may not count as an EC Leg for you the next month if she/he doesn’t meet her/his PSL1V requirement for that month as well.

25. Will my Downline count as an EC Leg for me if she/he graces on SV?
   A. An Orange Circle will indicate a Consultant who has qualified as an EC for you for the current month by using an available Grace for PSL1V or by using an available Grace for SV, if the Consultant has a qualifying EC Leg in her/his Downline.

Performance - Vital Signs

1. What is the "Vital Signs" Report?
   a. The Vital Signs Report allows you to easily track the progress of and communicate with all Consultants in your Organization. Please note this report does not include your Preferred Customers. You can track Preferred Customer activity in the PC Perks Autoship Report.

2. Are Preferred Customers included in my Vital Signs report?

3. What kind of information is available in the Vital Signs Report?
   a. The Vital Signs Report shows you information about your personal performance and the performance of your Team.
4. How often is the information in the Vital Signs Report updated?
   a. The Vital Signs Report is updated in near real time. As transactions occur within your Organization, the information in the Vital Signs Report is updated right away.

5. Where is the Vital Signs Report located?
   a. The Vital Signs Report is located under the Performance tab.

6. How do I sort a report?
   a. Sorting is easy. Simply click on a column header to sort the report by the data in that column. Click once and the report is sorted in ascending order. Click again and the report will be sorted in descending order. Please note that not all columns are sortable.

7. How do I filter a report?
   a. To filter a report, click on “+ Show More Filter Options” link. Enter your filter criteria and the report will automatically filter your results. For detailed explanation of available filters, refer to the Pulse User Guide.

8. Can I export my Vital Signs Report to Excel?
   a. Yes, you can export the Vital Signs Report using the “Export to Excel” button at the top of the report.

9. How can I filter for more than one state at a time?
   a. To narrow your results by state, click on the “+ Show More Filter Options” link. This will display the “More Filters” panel with the filter for “State.” Multiple selection is allowed.

10. How can I filter a range of Volume or Title?
    a. First, click on the “+ Show More Filter Options” link. For filters with “Min” and “Max” ranges, entered values are inclusive, and you can filter by entering a range with both minimum & maximum values (Ex: to see who enrolled last year enter Min: 1/1/2010; Max: 12/31/2010).

11. Can I export filtered reports?
    a. Yes. Only the filtered data will be exported in Excel.

12. How do I e-mail all my Consultants?
    a. To e-mail all Consultants in your organization, click on the “E-mail All In This Report” button. The email will be sent to each recipient individually, making it a conversation between you and each individual recipient. Your name will show in the “From” field and “To” field will never include any other names in the communication.

13. How do I e-mail certain Consultants as a group?
    a. Click the box in the far left column to check desired members of the report then click the “E-mail Selected On Page” button. Clicking the checkbox at the top of the column will select everyone on the page. Please note that if you have more than one page of Consultants, this method will only include Consultants on the current page.
14. Can I e-mail a specific Consultant?
   a. Yes. Click the box in the far left column to check desired member you wish to e-mail and then click the “E-mail Selected On Page” button. Alternatively, you can click on the row to bring up the Consultant’s Info Card and use the e-mail link on the Info Card.

15. How can I send an e-mail to targeted people?
   a. One of the advantages of using the Vital Signs Report is that you can communicate to targeted groups within your organization. Simply filter your report to show people that you want to target then use the “E-mail All In This Report” button to send them an e-mail.

Performance _ RF² Reports

1. What RF² Reports are available?
   a. There are two different RF² reports available on Pulse: Executive Performance and Current Performance.

2. Who is included in these reports?
   a. Your Executive Consultants in your Personal Team are included in the reports.

3. What information is included in the Executive Consultants RF² Report?
   a. The Executive Consultants Report shows key milestones of Executives in your Personal Team and how they are tracking toward key milestones on the Road to RF² in the last closed commission period. In addition, it provides RF² title qualification data for the last closed commission period for your Personal Team ECs.

4. What information is included in the Current Performance RF² Report?
   a. The Current Performance Report shows key milestones of Executives in your Personal Team and how they are tracking toward key milestones on the Road to RF² in the current month. In addition, it provides RF² title qualification data for the current month for your Personal Team ECs.

5. How are L1 + L2 Volume & L1 – L6 Volume calculated?
   a. These qualification volumes are the sum of Commissionable Volumes of your physical levels but it does take into account Roll Arounds.

6. Why can’t I see my current Organization Volume in the Current Performance Report?
   a. Since Organization Volume is constantly changing throughout the month as Executives promote and generations emerge, we can’t show that in real time. Instead, we have added L1 – L6 Volume to help you gauge your performance. Your Organization Volume is at least the amount of your L1 – L6 Volume but could be more.

7. Can I export to excel?
   a. Yes, as with other Corporate Reports, you will be able to export to Excel.
8. Can I e-mail my ECs?
   a. Yes, you will be able to e-mail selected individuals as well as e-mail to all on the report.

9. Can I see who is in their Leg?
   a. No, each report will only show you the number of “EC Legs in Personal Team” and the number of “LV EC Legs in Personal Team.” To view who’s in their Leg, go to the Flat Downline Tree or the Graphical Downline and search for their name.

Performance – Fast Start Reports

1. What is Fast Start?
   A. Fast Start reports are designed to help you easily track your Fast Start earning potential.

2. What types of reports are available?
   A. There are two different Fast Start reports available on Pulse: Team Development Bonus and Team Advancement Bonus.

3. Who is included in the Team Development Bonus Report?
   A. This report shows all your Personally Sponsored Consultants in the last 60 days and their Enrollment data.

4. Who is included in the Team Advancement Bonus Report?
   A. This report shows all your Personally Sponsored Consultants who have never achieved a Recognition Title of LII EC or higher.

5. How does the Team Development Bonus Report help me?
   A. You can use this report to determine which of your newly enrolled Consultants are eligible for the Fast Start Team Development Bonus.

6. How does the Team Advancement Bonus Report help me?
   A. Since the Fast Start Team Advancement Bonus is awarded when a Consultant reaches the Recognition Title of LII EC or higher for the first time, you can use this report to determine which of your Consultants have the potential to earn the Fast Start Team Advancement Bonus for you and the Consultant.

Performance – Autoship Reports

1. What Autoship Reports are available?
   a. Autoship orders are broken into two types of reports: CRP (for your own and your Consultant CRP & Pulse Subscription Autoship orders) and PC Perks (for your Preferred Customer Autoship orders).
2. What orders are included in the Autoship Reports?
   a. The CRP Autoship report lists all pending, processed, first month and failed Autoship orders for the Commission Period, including Pulse Subscription orders. The PC Perks Autoship report lists all pending, processed, off-month and failed PC Perk orders of your L1-L3 Preferred Customers.

3. How do I filter for just the Failed Orders?
   a. To narrow your results by Failed Orders, click on the “+ Show More Filter Options” link. This will display the “More Filters” panel. Click on the Status drop down menu and choose the “Failed” option.

4. How do I e-mail my Consultants or Preferred Customers with failed Autoships?
   a. Filter your report to show only the Failed Orders then use the “E-mail Selected On This Page” or “E-mail All In This Report” button to send your e-mail.

5. How do I see just the PC Perks that are off-month to plan for the next month?
   a. To narrow your results by off-month, click on the “+ Show More Filter Options” link to display the “More Filters” panel. Click on the PC Perks Status drop down menu and choose the “Off-Month” option.

6. Can I see more information about the Consultant/PC?
   a. Yes, clicking on the name of the Consultant/PC will bring up the Info Card on that individual.

7. Can I export to excel?
   a. Yes, as with other Corporate Reports, you will be able to export to Excel.

Performance – Promotions Report

1. What information is provided in the Promotions Report?
   a. The Promotions Report shows all Downline Team members who have ever promoted to an Executive Consultant Title or higher and the date they achieved their specific Recognition Title(s).

2. What date is shown if a Consultant has promoted to an EC Title more than once?
   a. The report displays the first date a Consultant has achieved a specific Recognition Title.

3. For what Titles does this report display corresponding promotion dates?
   a. You will see corresponding promotion dates (again, the very first time a Consultant has achieved the specific Recognition Title) for: EC, LI EC, LII EC, LIII EC, LIV EC and LV EC Titles.

4. Can I filter this report?
   a. Yes, you can filter this report by searching by name and additional filter options including: Level, Recognition Title, Prior Month Title, Current Month Qualification Title, Enrollment Date and specific Recognition Title achievement months.
5. How do I filter for just the newly promoted Consultants?
   a. To find new promotions in your Organization, filter by specific Recognition Title achievement
      months in the “View More Filter Options” panel. For example, if you’d like to know who has
      promoted to an EC Title last month, click on the “Min” field for EC Date and select the last
      month from the calendar picker. Then, hit “Run Report.”

6. Is there a way to look up a Consultant’s phone number so I can call to congratulate them on their
   promotion?
   a. Yes. To look up a Consultant’s contact information, including their phone number and their
      address, click on the specific Consultant’s name. Their Info Card will pop up where you can view
      their contact information along with other Consultant-related information.

7. Can I e-mail Team members from this report?
   a. Yes. You can e-mail your Team members in three ways:
      1) **To e-mail one person at a time**: click on the individual Team member’s
         name and click on the E-mail Address field displayed on the Team
         member’s Info Card.
      2) **To e-mail multiple people**: check the checkboxes to the left of the Team
         members’ names then click on the “E-mail Selected On This Page” button.
      3) **To e-mail everyone in the report**: click on the “E-mail All In This Report”
         button.

8. How do I export this report?
   a. To export this report, click on the “Export to Excel” button above the column headers.

**Performance – Downline Report**

1. What is a Downline Report?
   a. The Downline Report shows the current month’s performance data of yourself and your Downline,
      including SV, PSL1V and Grace balance.

2. Who is included in the Downline Report?
   a. All Consultants and Preferred Customers in your Organization.

3. What information is included in the report?
   a. All information on your Consultants/PCs is included on the report: level, name, title, when they
      joined, complete contact information, their Sponsor, present/last/next Grace information, Active
      status, CRP/SV/PCV L1/PCV and PSL1V information.

4. Is the Downline Report available to non-Pulse Pro accounts?
   a. Yes. The Downline Report is available to all Consultants.
Performance – Earnings Statement

1. What is the Earnings Statement?
   a. The Earnings Statement is a summary statement of overall commission earnings for the selected month.

2. What information is included in the report?
   a. This report displays your earnings information for the last closed commission including your titles, organization volumes, any qualified bonuses and the earnings breakdown of each individual in your Organization on which you earned commissions.

3. Can you see past Earnings Statements?
   a. Yes. To view your past Earnings Statement, select the month you wish to view from the Period drop down menu.

4. Can you see a current month’s Earnings Statement real time?
   a. No. The Earnings Statement is only available once a commission period has closed. This typically happens around the 10th – 15th of the month.

5. Why does it show my Earnings Statement from two months ago as my latest report, not from the last month?
   a. Because your Earnings Statement is made available after the close of the commission period, If the prior month has not been closed, then your latest Earnings Statement would be from two months ago.

Biz Dev Library

1. What is available under the Biz Dev Library tab?
   a. The Biz Dev Library houses all business forms, training, frequently asked questions, videos and other business support.

2. How do I find the file I am looking for in the Biz Dev Library?
   a. You are able to easily find files by typing the title or a keyword into the “Search” bar. This will pull up all files with your search criteria. You can narrow your search by selecting a category and filtering documents within that category.

3. What types of files are available in the Biz Dev Library?
   a. All approved files are in the library including PDF files, audio files, videos and webinars.

4. How are documents sorted in the Biz Dev Library?
   a. There are three sort options at the top of the Biz Dev Library. You are able to sort alphabetically by name, date added or category. By default, the documents are sorted alphabetically by name, but you can easily change this by clicking on the sort option you prefer.
5. Can I attach files from the Biz Dev Library to an e-mail?
   a. Not directly. You must first download the document you wish to e-mail onto your computer, then e-mail it as an attachment.

6. Can I customize my PDFs?
   a. Yes. You can customize the PDFs found in Biz Dev Library. Click into form fields where you can add your own information and save the file to your computer.

Contacts

1. In creating my Contact list, do I have to enter my Downline Consultants individually?
   a. Your Contacts will be pre-populated with Consultants in your Personal Team and your Preferred Customers. This will include their name, e-mail, address, and phone number, as well as their order history. You can add other Consultants in your organization as Contacts manually.

2. Will every Consultant in my Downline be automatically imported into my Contacts?
   a. Consultants outside your Personal Team will not be populated in your Contacts. However, you are able to e-mail all of the Consultants in your Downline by going to the Vital Signs report under the Performance tab and clicking on the “E-mail All On This Report” button.

3. Will my Retail Customers automatically be imported into Pulse?
   a. No. You will need to add your Retail Customers to your Contacts. You are able to access Contact information for Retail Customers by going to the Order tab and clicking on the retail order of that Customer.

4. What should I do if there is no address displayed for my Personal Team Consultant or Preferred Customer?
   a. When there is no main address associated with an account, you will not see any address information listed. Please be advised that since there can be multiple Shipping and Billing Addresses, we cannot automatically assign them as a main address for the account.
      • Please encourage your Consultants to log into Pulse and update their “Main Address” information under the “My Account” tab.
      • For Preferred Customers, please instruct them to e-mail the PC Perks Support at PCPerks@rodanandfields.com to update their main address.

5. How do I enter my personal Contacts?
   a. You can enter them one by one as you build your “list” by clicking the “Add a New Contact” button on the left navigation panel. You can also import your personal Contacts from other programs using a CSV file.

6. What programs allow me to import my Contacts?
   a. You can import from any program that allows the creation of a CSV or comma-separated values file. For example, these files can be created from Constant Contact, Outlook, Gmail, Hotmail and Yahoo. Instructions on importing Contacts from specific programs can be found in the Pulse User Guide in the Biz Dev Library.
7. **How do I edit a Contact?**
   a. You can only edit your own Contacts (not your Preferred Customers or your Consultants) in your My Contacts group. Click the edit icon in the display window for the Contact you want to edit. You are then able to edit all the fields in the Contact file.

8. **Can I export my Contacts?**
   a. No. You cannot export your Contacts.

9. **What are Solution Tool Contacts?**
   a. These contacts include your Customers and Prospects who have e-mailed themselves the personalized skincare routine from your PWS link to the Rodan + Fields Solution Tool. From this list, you can view their name, e-mail address and also their recommended regimen so you can follow up easily. For more information about the Solution Tool, refer to the Solution Tool flyer in the Biz Dev Library.

**EComms**

1. **Can I add a rich text to my e-mail signature?**
   a. Yes. You can style your signature using the rich text editor in the eComms tab. Simply click on the “Signature” link on the left-hand side navigation menu and follow instructions.

2. **Can I add a photo to my e-mail signature?**
   a. No. You cannot add a photo but you can use one of our HTML templates that will display your photo on your PWS and contact information. Additionally, you can use the rich text editor to style your signature.

3. **Can I create my own distribution lists?**
   a. Unfortunately we do not currently offer this feature. There are a number of distribution groups that you can utilize. From the Contacts tab, you can click on the E-mail My Personal Team Consultants or E-mail My Preferred Customers to e-mail your Personal Team as a group. Additionally, from your Performance Reports, you can select and filter people on the report and e-mail them as a group.

4. **How do I attach files to my e-mail?**
   a. You can attach files to your outgoing e-mail by clicking on the “Attach” button from the Compose a New Message screen.

5. **Can I forward my Pulse e-mail to another account?**
   a. You can only access your Pulse e-mail online through Pulse; however, you can manually forward your e-mails to another account. At this point, it is not possible to automatically forward your e-mail to another account.

6. **Are there customizable e-mail templates available?**
   a. Yes. We have a number of HTML templates that you can customize with your own text and contact information. To preview and select the template you want, click on the Compose a New Message button then click on the “Template” link.
7. What is my Pulse e-mail address?
   a. Your e-mail address is the first part of your current PWS URL @myrandf.com. For example: If your
      PWS URL is: http://susieq.myrandf.com your e-mail address is susieq@myrandf.com

Orders

1. What orders am I able to see in Pulse?
   a. Pulse allows you to see the order history of your personal orders, your Retail Customer orders,
      your Preferred Customer orders, your L1 Consultant orders and their Retail Customer orders. Go
      to the Orders tab to view the Order History.

2. How can I see the order details?
   a. You can see the order details of your own orders, your PCs' orders, and your Retail Customers'
      orders. You can access the details by going to the Orders tab then clicking on the “View Details”
      link next to the specific order that you want to see. You will see an Order Details screen that
      includes order details, as well as shipping and tracking information.

3. What do I do if the status of a Preferred Customer Autoship or CRP Autoship has failed?
   a. This means there is a problem with the credit card on file. We recommend you contact your
      Preferred Customer or Consultant to help them resolve the issue.

4. How can I see pending Autoship orders?
   a. Use the Autoship report under the Performance tab to view pending and off-month Autoship
      orders. Please remember to click on the appropriate report tab (CRP vs. PC Perks) to view the
      information.

5. How soon will orders appear in Pulse?
   a. Orders are updated immediately. As orders are placed in your Organization, the information is
      updated right away. If you do not see your order in Pulse right away, try refreshing the page in a
      few minutes.

6. Can I manage multiple shipping profiles and billing profiles from Pulse?
   a. Yes. You can add, edit and delete multiple shipping and billing profiles in the My Account tab. You
      can also make any one of them your default shipping or billing profile. Please note that
      changing your default shipping or billing profiles will not automatically update your existing
      Autoship orders.

My Account

1. How do I update my contact information?
   a. Go to the Admin tab and click "Edit" under My Primary Account Record.
2. Where do I manage my CRP order?
   a. You are able to manage your CRP order including changes to your order, credit card and/or shipping address in Pulse under the Admin tab. Click the “Edit My CRP” link on the left navigation panel.

3. Why do you need my “address of record”?
   a. Your “address of record” is where we will send all corporate communications, including tax forms and other business correspondence.

4. Where do I edit my PWS?
   a. To edit your PWS, click on the “Edit My PWS” link on the left navigation panel. Alternatively, you can select the “Edit My PWS” link from the drop down menu below your name on the top right corner of the header area.

5. How do I change my direct deposit information?
   a. If you want to change your direct deposit information, please complete a new Direct Deposit Enrollment Form and fax it in. We will process your change as quickly as possible and send you e-mail confirmation when the update is complete.

6. If I change my password, how soon will the change be effective?
   a. Passwords are changed right away.

7. If I change my password in Pulse, does my password for my PWS change too?
   a. Yes, your PWS and Pulse password are always the same.

8. Can I manage multiple shipping profiles and billing profiles from Pulse?
   a. Yes. You can add, edit and delete multiple shipping and billing profiles in the My Account tab. You can also make any one of them your default shipping or billing profile. Please note that changing your default shipping or billing profiles will not automatically update your existing Autoship orders.