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1. INTRODUCTION

1.1. Turbo-Marketing.net

Turbo-Marketing.net is a web-enabled direct marketing platform that puts list segmentation, selection, and processing in the hands of the customer. It was created in response to customer demands for a more powerful information processing tool. Private Label Turbo-Marketing.net was created to provide customers a platform that uses their own brand, pricing, and control. Turbo-Marketing.net eliminates the need for programmers and hardware.

- ***TurboList*** streamlines the selection of target audiences for direct marketing campaigns. It contains compiled and response lists that are updated and cleaned in a consistent, quality-oriented approach. Private Label Owners may place their own files on their own site and, optionally, on those sites selling brokered lists. TurboList provides customer-friendly list segmentation, counts, and order selection.
- ***TurboFiles*** allows the customer to upload and download files for processing or files ordered through Turbo.
- ***TurboAppend & Processing*** provides the means to enhance a marketing file provided by a customer. The enhancements may be demographics needed to segment the list, phones for customer contact, or Do-Not-Call flags for prospect suppression.
- ***TurboSuppression*** allows the customer to upload house files to be used as suppressions by either address or phone number.

1.2. Turbo Express

Turbo Express allows a novice to easily order lists for direct marketing campaigns.

1.3. How To Use This Manual

This Private Label Owner Manual describes how to use the marketing resources of Turbo-Marketing.net.

Each section of this manual describes a key feature of Private Label ownership of a Turbo site. The sections are organized as follows:

Section 2. Describes how to become a Private Label Owner and the steps involved in bringing a new Private Label site up and running. Explains special privileges given to the Owner of the Private Label site. These privileges include viewing customer counts and reviewing the billing and invoicing components of the system.

Section 3. Describes in detail the Managing Accounts functions that can be performed. Topics covered include online registration, management of customers as well as agents, and entry and maintenance of both system and customer pricing.

Section 4. Answers common questions, explains error handling, and deals with common requests from the perspective of the site Owner and from the site's customers.

1.4. Owner Manual Terms Defined

Terms defined here apply directly to this manual. Additional terms which may be used when working in Turbo are defined at the back of this manual.

Account

A unique customer established within your Turbo site: for example, your Owner account, your test customer account, and accounts for any of your customers that are added. Typically, an account will also include at least one agent assigned to that customer.

Agent

Regular Agent – An individual assigned to a customer account who may view and process only counts and orders that he/she created.

Supervisor Agent – An individual assigned to an account who may view and process all counts and orders created under that customer account (regardless of which agent created the count). A Supervisor agent will also be able to create and modify agents assigned to that customer account.

Owner Manager – An individual assigned to the Owner's account who may view and process all counts and orders under *any* customer account. An *Owner Manager* will also be able to create and modify customer accounts and agents, and may (optionally) be able to create and modify System and Customer Level Pricing and Quotes.

Owner Agent – An individual assigned to the Owner's account who may access counts and orders for any company or agent, but cannot access the Manage Accounts functions for customers, agents, and pricing.

Customer

Customer Account – A unique account created for each of the owner's customers.

Owner's Account – The unique customer account established for the Private Label Owner.

Prospect Only Customer – A customer account from which counts may be run, but orders cannot be run.

Regular Customer – A customer account from which counts and orders may be run.

VeriSign Customer – A regular customer account that requires payment by credit card at the time of any order, unless the order is initiated by an Owner Manager.

Customer Level Pricing

Includes individual customer pricing and (optionally) customer price quotes.

FTP

An acronym for File Transfer Protocol.

List ID

A unique identifier associated with a specific List.

Manager

An Agent level – see "Agent – *Owner Manager*" for details.

Online Registration

An optional feature within Turbo that enables new customers to access a Private Label site, create an account, and order without any intervention on the site owner's part.

Owner
Refers to the individuals and/or account for which this Private Label Turbo site was established.

Owner Level Costs Pricing
Registration as a Private Label Turbo Owner includes an agreement on charges for orders processed through that Private Label site, represented under the Owner Level Costs pricing.

Payflow Link
Payflow Link is the VeriSign product that facilitates secure processing of credit card payments over the Internet.

Private Label
The Turbo product that enables list brokers, list managers, ad agencies, and customers to have their own Turbo site that uses their own brand, pricing, and control, all without the need for programmers and additional software/hardware.

Private Label Manager
The individual agent(s) at a Private Label company responsible for the maintenance of that company's Private Label customers, agents, and pricing.

Prospect
A type of Customer – see "Customer – *Prospect Only Customer*" for details.

Quote
Exceptional customer pricing established for a specific order or series of orders. Any quote will expire after use and/or after a specified date.

Site
Refers to your Private Label Turbo system / website.

Supervisor
An Agent level – see "Agent – *Supervisor Agent*" for details.

System Level Pricing
Includes Owner Level Costs, System Minimum, and System Standard Pricing.

System Minimum Pricing
This represents the minimum prices that may be set for customer pricing and quotes, as well as for System Standard Pricing.

System Standard Pricing
This represents each Private Label site's customer default/retail pricing.

Transaction Processing Mode
A setting within a Private Label site's VeriSign Payflow Link configuration that determines whether credit card processing through that site's VeriSign account is to be treated as a Test or a Live transaction.

Turbo
The term that encompasses all functions of Turbo-Marketing.net and Turbo Express.

Turbo Support Manager
The customer service representative who will assist with the setup and ongoing operation of each Private Label Turbo site.

UOM
An acronym for Unit of Measurement.

URL
An acronym for Uniform Resource Locator. Each web page has a unique address. Any web page can be accessed by entering the URL in web browser software.

VeriSign
A company used by Turbo-Marketing.net that provides secure processing of credit card payments over the Internet.

VeriSign Partner
A credit card transaction processor from whom you get your account if you do not work directly with VeriSign.

2. Becoming a Private Label Owner

2.1. *Private Label – Owner Information Form*
2.2. *Managing Your Private Label Site*
2.2.1. *Turbo–Marketing.net Site ID*
2.2.2. *Logoff Website URL*
2.2.3. *Turbo-marketing.net Administrator*
2.2.4. *Site Contact Information*
2.2.5. *Support Information*
2.2.6. *Site Logos*
2.3. *Additional Options for Your Private Label Site*
2.3.1. *Online Registration Setting*
2.3.2. *Customer Invoice Setting*
2.3.3. *VeriSign Payflow Link Information*
2.4. *Taking Your Private Label Site "Live"*
2.4.1. *Owner "Walk-Thru"*
2.4.2. *Trying Out Your New Site*
2.4.3. *Links to Your New Site*
2.4.4. *Testing Procedures*
2.5. *Owner Privileges*
2.5.1. *Viewing Customer Counts and Orders*
2.5.2. *Billing and Invoicing Private Label Accounts*
2.5.3. *Order Disputes*
2.6. *Online Registration*
2.6.1. *Account Registration*
2.6.2. *Account Registration Confirmation*
2.6.3. *Customer Registration Confirmation eMAIL*
2.6.4. *Sales Registration Confirmation eMAIL*
2.7. *Purging Counts, Orders, and Accounts*

Following are highlights of the requirements to become a Private Label Owner on the Turbo System.

- **Complete the "Private Label Setup — Owner Information" form.** Your Sales Representative will provide this form for you to complete and return to start the process. A more-detailed explanation of each requirement and its use follows in the "2.2. Managing Your Private Label Site" section to assist your setup. Direct questions regarding the setup requirements to the Turbo Support Manager.

- **Establish your own VeriSign Payflow Link Account.** This is required only if you want to allow credit card payments through your Turbo site. Details on this setup can be found in the "2.3.3. VeriSign Payflow Link Information" subsection of the "Additional Options for Your Private Label Site" section of this manual.

- **Establish a link from your company website to your new Turbo site.** Details on setting up this link can be found in the "2.4.3. Links to Your New Site" subsection of the "Taking Your Private Label Site 'Live'" section of this manual.

- **Schedule a time for your Owner "Walk-Thru" once your site has been established.** All persons at your company who will be involved with maintaining your Private Label customer accounts, agents, and/or pricing should be included in this important training session. The "2.4.1. Owner "Walk-Thru"" subsection of the "Taking Your Private Label Site Live" section of this manual highlights the points that will be covered during this training.
- **Customize your System Level Pricing.** Once your "Walk-Thru" has been completed, adjust your System Standard and System Minimum Pricing to reflect your company's requirements. A more-detailed explanation of these pricing levels and how to modify them follows in the "3.4. Manage Pricing" subsection of the "Managing Accounts" section of this manual.
- **Create your own customer accounts, agents, and pricing.** Add your own customers to the system, along with their agents, and establish customer specific pricing as needed. Remember to add your own company's employees to the system as well. Refer to the "3. Managing Accounts" section of this manual for details.
- **Introduce your customers to your new Turbo site.** Provide your customers with the account, agents, and password information established for them, and train them on how to use the system.

2.1. Private Label — Owner Information Form

To become a Private Label Owner on the Turbo System, please supply the following information in the areas provided, and eMAIL this form to your Sales Representative at support@turbo-marketing.net. The letters on this form correspond to the sections of explanations found in the Owner Manual's "2.2. Managing Your Private Label Site."

Private Label – Owner Information Form

CAS will develop your Private Label site using the information you supply. Please fill in the information requested below. Talk to your sales representative if you have any questions.

Company Name: Date:

2.2.1. What would you like your new site ID to be?

Example: http://yourcompanyname.turbo-marketing.net

Your Private Label Web Address: .turbo-marketing.net

2.2.2. When a customer logs off Turbo-Marketing.net which URL do you wish to return them to?

Example: www.yourhomepage.com

Your Web Address: www.

2.2.3. Who do you want as your Technical Support Contact?

Name:

Email Address: @

Phone: - -

2.2.4. Please provide the Name, eMAIL address, and phone numbers for the following departments:

Sales	*Name:*	
	Email:	@
	Phone	- -
Customer Service	***Name:***	
	Email:	@
	Phone	- -
Accounting	***Name:***	
	Email:	@
	Phone	- -

2.2.5. What would you like your customer support message to be?

Example: *Our customer support hours are*
8 AM to 6 PM
CST Standard Time

Your Message:

2.2.6. Please eMAIL your logo(s) to **`support@turbo-marketing.net`** .

2.2. Managing Your Private Label Site

2.2.1. Turbo-Marketing.net Site ID

The **Site ID** is the unique identification of your Turbo-Marketing.net Private Label site. A website URL will be established by the Turbo Support Manager using this Site ID. The format of the URL is http://`xxxxxxxx.turbo-marketing.net` (where `xxxxxxxx` is your Site ID). If you do not supply a Site ID, the system will default to: your `companyname.turbo-marketing.net`.

Rules:

- Lower case alpha characters `a` through `z`.
- Numeric characters `0` through `9`.
- The only special character allowed is a hyphen (`-`).

Example:

New Private Label Owner "Demo Lists, Inc." may choose the Site ID to be `demolists`. The Turbo site URL would then be set up as: `http://demolists.turbo-marketing.net`.

Owners must provide a "link" from their company's website to their new Turbo site. Begin this process as soon as possible, so that you can implement the link as soon as your Turbo site is ready. See the "2.4.3. Links To Your New Site" subsection in the "Taking Your Private Label Site 'Live'" section of this manual for additional details on establishing this important link.

After you become a Private Label Owner, any changes to the Turbo Site ID need to be coordinated through and implemented by the Turbo Support Manager.

2.2.2. Logoff Website URL

When customers log off from your Turbo site, or when they click on the HOME key on your Turbo Login screen, they will be sent to this website/URL. You would typically specify your logoff URL to be your company's website URL. If you do not supply a website URL, the system will be set up using your corporate website address.

Example:

New Private Label Owner "Demo Lists, Inc." may choose the logoff URL to be `www.demolists.com`, which is the main website for Demo Lists, Inc.

After you become a Private Label Owner, any changes to the logoff URL need to be coordinated and implemented through the Turbo Support Manager.

2.2.3. Turbo-marketing.net Administrator

The Private Label Owner Manager is the person responsible for both control and maintenance of the accounts within your Private Label site. This Owner Manager will be established with full security access to create and maintain customers, agents, and pricing information for your company and for all customers within your Private Label site.

As a Private label Owner, you must identify, by name and eMAIL address, *at least one* individual to be set up as your Private Label Owner Manager.

NOTE: This is a *management* position, not a technical position.

The Private Label Owner Manager may establish additional Owner Managers. Please refer to the "3.3.2. Add an Agent" and "3.3.3. Modify an Agent" subsections of "Manage Agents*" in this manual for details.*

If no Private Label Owner manager is identified, the system will become operational using the contact name and eMAIL address of the individual who agreed to become a Private Label Owner.

2.2.4. Site Contact Information

Your site's contact information is used in various places within your Turbo site. The eMAIL addresses and phone numbers are used in correspondence sent to your customers and are displayed on certain screens within the Turbo system They control who is to receive this information. The following is an overview of when and how this information is used.

Note: If your company does not have separate eMAIL addresses and phone numbers for Sales, Customer Service, and Accounting, Turbo can use the same eMAIL address and phone number for all three contacts, or any combination you would prefer.

Turbo can also use multiple eMAIL addresses in each contact area (up to a maximum of 128 characters per eMAIL area) if you do not have "group" eMAIL addresses established.

2.2.4.1. The **Sales** eMAIL address and phone number will appear on the eMAIL sent to a new customer at registration through the Online Registration process. An eMAIL will also be sent to the Sales eMAIL address with notification that the new account was created. Your Sales Department can then follow up with that new customer.

2.2.4.2. The **Customer Service** eMAIL address will receive an eMAIL when a duplicate customer or agent is rejected during Online Registration. Your Customer Service team can then follow up with the person who was rejected to ensure they are added as an agent under the existing customer account. The Owner's Customer Service phone number will also be provided to the person who tried to create the duplicate account.

2.2.4.3. The **Accounting** eMAIL address will receive invoices for each order completed by your customers through your Turbo site.

2.2.5. Support Information

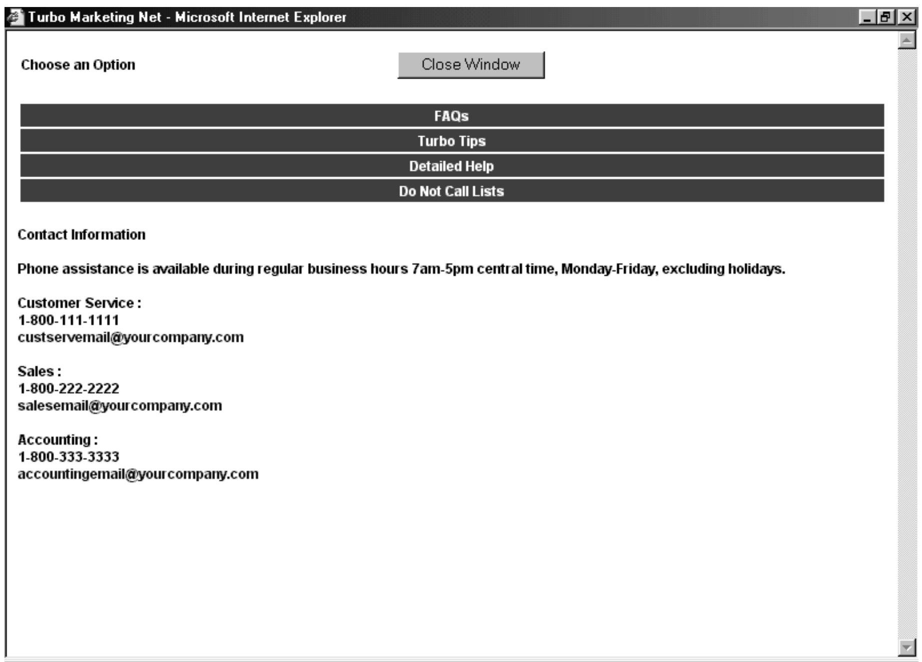
The **Support Message** typically would contain what hours of the day and days of the week your office will be open to receive phone calls. The support message is optional.

Example of a Support Message:

Phone assistance is available during regular business hours 7 a.m. to 5 p.m. Central time, Monday – Friday, excluding holidays.

All three departmental eMAIL addresses, phone numbers, and the support message are displayed within the Help window on the Turbo site when your agents click on the Help tab.

Example of a Help window:



After you become a Private Label Owner, any changes to the Site Contact Information need to be coordinated and implemented through the Turbo Support Manager.

2.2.6. Site Logos

The Turbo-Marketing.net Design Team will resize your logos to fit into the allocated space on the Turbo screens.

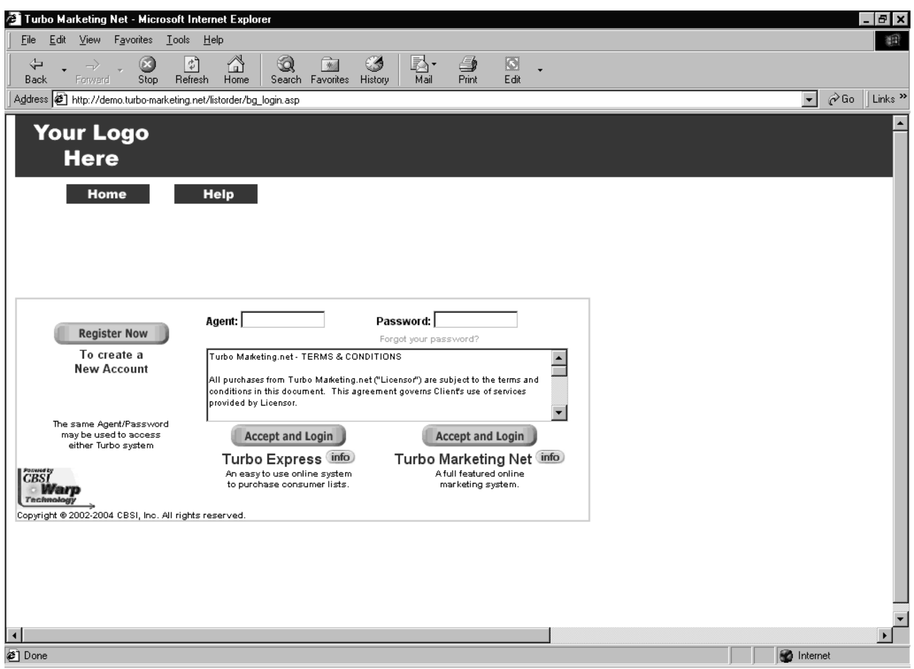
2.2.6.1. The **Login Screen Logo and optional background image** should be what you want to appear on your Turbo Login screen. This logo and optional background will appear only on the Login screen of your Private Label site. The Login Logo will appear across the top of your Login screen. This logo and background would typically be similar to the logo and background on your company's website.

Rules:

- Supply your Login Screen Logo in a jpeg file format.
- Preferred size of the Login Screen Logo is 110 pixels for height and 1280 pixels for width. Words or images on the left side of the logo should be limited to 800 pixels width to ensure they appear for any screen resolution customers may use.

  Supply a background image or color in a jpeg file format (optional). The background image or color can be sized to fill your entire Login screen. If no image or color is specified, the background will be white.
- If the logo and background are not available in jpeg file format, submit them on either letterhead or a business card that has a clear, sharp image to copy. If you do not supply logo or background images, the logo and color scheme from your corporate website will be used.

Example:

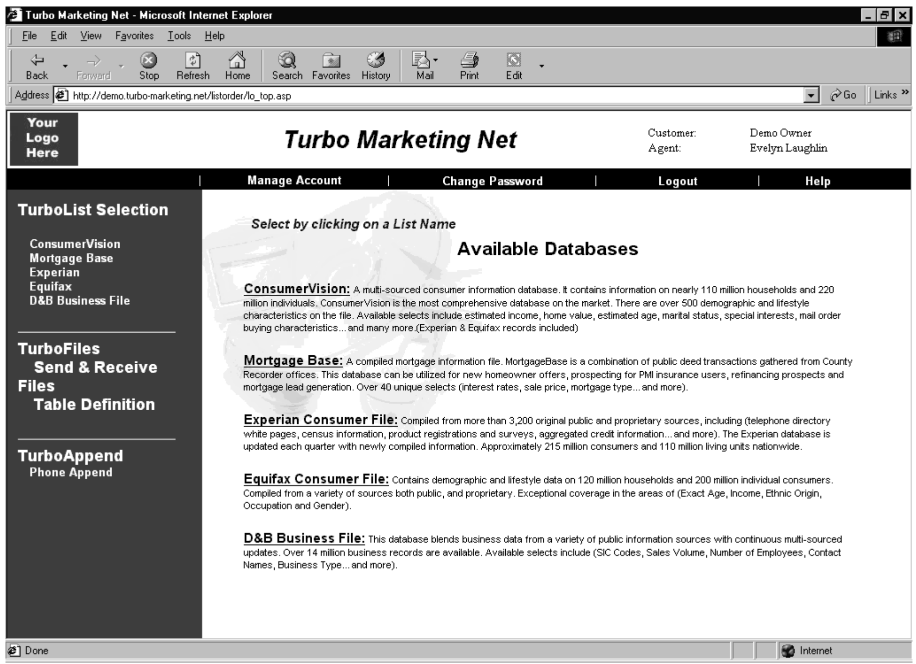


2.2.6.2. The **Screens Logo** which appears on each page should be smaller than what appears on the Login screen. This logo will appear in the upper left corner of the screens.

Rules:

- Supply your logo in a jpeg file format.
- Preferred size is 60 pixels for height and 70 to 140 pixels width.
- If the logo is not available in jpeg file format, submit it on either letterhead or a business card that has a clear, sharp image to copy. If you do not supply a screens logo, your Private Label system will be made operational using the logo and color scheme from your corporate website.

Example:



After you become a Private Label Owner, any changes to the Turbo Site Logos need to be coordinated through and implemented by the Turbo Support Manager.

2.3. Additional Options for Your Private Label Site

2.3.1. Online Registration Setting

Online Registration is a feature available on the Login screen of your Turbo site. This feature, if allowed, will provide a "Register Now" button on your Turbo Login screen. This button enables new customers to access your site, create a new customer account, and run counts and orders (if you so choose), all without any intervention on your part.

This Online Registration Setting applies only to Online Registration from the Login screen, and has no effect on accounts you create through the Manage Account area of your site. See the "2.6. Online Registration" section of the "Becoming a Private Label Owner" chapter of this manual for addition details.

Determine what level of Online Registration you want to allow on your Turbo Site:

- **None –** This setting will completely suppress the "To Create A New Account – Register Now" portion of your Login screen. Customers will need to contact you directly to open a new account.
- **Prospects Only –** This setting will allow Online Registration from your site, but will set these accounts up as a *Prospect Only* type of customer. They will be allowed to run counts, but will not be able to run orders. You will need to manually update these to a regular customer via the Manage Customer function, if you want to allow them to run orders. This is the default for non-VeriSign sites.
- **Full Customer Account –** This setting will allow Online Registration from your site, and will set these accounts up as regular customers. They will be able to run counts and orders. These accounts will default to being required to pay for any orders by credit card. They will also default to your System Standard Pricing. You will be able to modify the customer credit card setting, and establish other pricing for these accounts through the Manage Account area of the system. This is the default for VeriSign sites. New registrants can order *only one time*. The Owner Manager must change their status from New Registration to Regular in order to give them the ability to order again.

Your system will become operational using the Prospect Only setting if VeriSign Payflow Link is not established and activated.

After you become a Private Label Owner, any changes to the Online Registration Setting need to be coordinated and implemented through the Turbo Support Manager.

2.3.2. Customer Invoice Setting

All agents of a Private Label Owner who run an order through the Turbo system will, by default, receive an eMAIL containing the Customer Invoice for the order, in addition to the invoice available online within the Turbo system. As an Owner, you may choose to have the agents of your company receive this Customer Invoice eMAIL, or choose to have it suppressed. For more information about Private Label invoices, refer to “2.5.2. Billing and Invoicing Private Label Accounts” in chapter 2.

This setting pertains only to the Owner’s agents, and has no effect on the invoices your customers will receive *if* the customer’s agents run the order.

Do you want *your* company’s agents to receive the **Customer Invoice** by eMAIL for orders?

1 —Always generate the Customer Invoice eMAIL, even when it is for an Owner Manager, Owner Agent, Supervisor Agent, or Regular Agent.

2 —If a count/order resides under, and is run by, an Owner Manager, Supervisor Agent, Regular Agent, or Owner Agent, the Customer Invoice eMAIL will not be sent to the agent. The invoice will appear with the order online for viewing, but an eMAIL version will not be generated. The Owner Invoice will still be generated. This is the default.

3 —Never send a customer invoice.

After you become a Private Label Owner, any changes to the Customer Invoice Setting need to be coordinated and implemented through the Turbo Support Manager.

2.3.3. VeriSign Payflow Link Information

Note: It may take some time to establish the VeriSign Payflow Link account, so *you should begin this process immediately if you require credit card payments on your Turbo site*. You may fill out the VeriSign Payflow Link form and the Turbo Support Manager will create your account for you.

VeriSign, a company used by Turbo, provides secure processing of credit card payments over the Internet. Payflow Link is the VeriSign product that facilitates this process. Payflow Link must not be confused with the Payflow Pro product. Turbo uses *only* the Payflow Link product.

VERISIGN CONSIDERATIONS:

- A VeriSign Payflow Link account and a merchant account are required in order to accept credit cards for order payment by your customers. It is also required if you want to enable "Full Account" Online Registrations on your Turbo site. If you do not require acceptance of credit card orders or "Full Account" Online Registrations, neither is required.
- This VeriSign Payflow Link account will be owned by your company, so all fees associated with the setup and ongoing operation will be the responsibility of your company.

TURBO/VERISIGN FRAUD PROTECTION SERVICES REQUIREMENTS

All Turbo Marketing Private Label Owners that have VeriSign payment functionality are required to upgrade their VeriSign Payflow Link account to include the VeriSign Advanced Fraud Protection Services. The following Security Settings and Fraud Protection Filters must be set at that time:

- Maximum Amount per Transaction Setting (set to $1,500.00)
- AVS (Address Verification Service) Failure (set to FULL strength)
- CSC (Card Security Code) Failure (set to FULL strength)
- Account Number Velocity
- International IP Address
- International AVS

Note: You may be able to negotiate a better rate on your merchant account with the addition of the Advanced Fraud Protection Services.

General information on VeriSign's Fraud Protection Services, and the purpose and benefits of each filter are described in detail on the pages that follow.

ABOUT VERISIGN'S FRAUD PROTECTION SERVICES

Online fraud is a serious and growing problem, one that cost merchants an estimated $1 billion in 2002.

While liability for fraudulent card-present or in-store transactions lies with the credit card issuer, liability for card-not-present transactions, including transactions conducted online, falls to the merchant. As you probably know, this means that a merchant that accepts a fraudulent online transaction does not receive repayment for the transaction and additionally must often pay penalty fees and higher transaction rates.

VeriSign’s Fraud Protection Services, in conjunction with your Payflow service’s standard security tools, can help you to significantly reduce these costs and the resulting damage to your business.

Transaction Security Settings

Transaction Security Settings identify transactions that exceed the normal size for your business. Because fraudsters might not feel limited in their purchasing power, they sometimes place orders that are much larger than the norm.

High-Risk Payment Filters

High-risk Payment Filters identify transactions that show billing/shipping discrepancies or an indication that someone other than the legitimate account holder is initiating the transaction.

International Order Filters

International Order Filters identify transactions associated with risky international locations.

MAXIMUM AMOUNT PER TRANSACTION SETTING

What does the setting do?

This setting compares the total amount of the transaction (any Authorization, Sale, Delayed Capture, or Voice Authorization transaction) to the maximum amount (the ceiling) that you specify.

The transaction will be declined whenever a transaction amount exceeds the specified maximum amount ($1,500.00).

How does the filter protect me?

An unusually high purchase amount (compared to the average for your business) can indicate potential fraudulent activity. Because fraudsters are not paying with their own money, they are not price-sensitive.

AVS FAILURE FILTER

What does the filter do?

Address Verification Service (AVS), compares the street number and the ZIP code submitted by the customer against the data on file with the issuer.

The transaction will be declined whenever the street number or the ZIP code information submitted does not match information on file with account holder's bank.

HOW DOES THE FILTER PROTECT ME?

Buyers who can provide the street number and ZIP code on file with the issuing bank are more likely to be the actual account holder.

CSC FAILURE FILTER

What does the filter do?

The card security code (CSC) is a 3- or 4-digit number (not part of the credit card number) that appears on credit card. The CSC check compares the number provided by the customer with the number on file with the issuer.

The transaction will be declined whenever the CSC information submitted does not match information on file with account holder's bank.

How does the filter protect me?

Because the CSC appears only on the card and not on receipts or statements, the CSC provides some assurance that the physical card is in the possession of the buyer.

ACCOUNT NUMBER VELOCITY FILTER

What does the filter do?

This filter scans for repeated use of the same credit card account number. The transaction will be declined when the account number is used a fifth time within a three-day (72-hour) period.

Warning: **When triggered, this filter performs the action specified *only* on the transaction that triggered the filter. This filter does not retroactively hold or reject the previous four transactions.**

Review the Transaction Details report and click the Account Velocity link to view the previous four transactions.

What is "velocity"?

In the risk management industry, velocity is a term that refers to the frequency in which an event occurs. Velocity could indicate that a fraudster is making repeated attacks on a system.

How does the filter protect me?

Fraudsters often make multiple purchases or attempts with a single account number within a short time period in order to "crack the system." A fraudulent credit card user may repeatedly attempt a transaction with the same card number in order to discover the card's valid billing address or card security code, or more simply the fraudster may attempt to make many small purchases to bypass item or price ceiling filters.

INTERNATIONAL IP ADDRESS FILTER

What does the filter do?

This filter screens for international IP addresses. An IP (Internet protocol) address is a unique identifier for a computer that can identify a particular network and a particular computer on that network.

The transaction will be declined whenever the IP address indicates an international computer or network (*.ie.*: customers in foreign countries).

How does the filter protect me?

Orders from customers in foreign countries are more likely to be fraudulent than orders from domestic customers. This is due to the difficulty of authenticating foreign citizens as well as the difficulty of cross-border legal enforcement against fraudulent activities.

INTERNATIONAL AVS FILTER

What does the filter do?

The International Address Verification Service (IAVS) determines whether the issuer is domestic (US) or international.

The transaction will be declined whenever the card number is associated with an international issuer (*i.e.*: customers with cards issued in foreign countries).

How does the filter protect me?

Orders from customers in foreign countries are more likely to be fraudulent than orders from domestic customers. This is due to the difficulty of authenticating foreign citizens as well as the difficulty of cross-border legal enforcement against fraudulent activities.

VERISIGN CONTACT INFORMATION

If you decide that you want to enable credit card payments on your Turbo site, you must fill out the VeriSign Payflow Link form. Once the worksheet is completed, you may turn it in to the Turbo Support Manager so she/he will set everything up. If you choose to have the Turbo Support Manager set up your account, please forward any eMAILs from VeriSign to that person. Otherwise, the Turbo Support Manager will work with you and VeriSign to ensure everything is set up properly.
IN ORDER TO SET UP YOUR OWN PAYFLOW LINK ACCOUNT, CONTACT:

```
VeriSign, Inc.,
Payment Services
Matt Watts, Territory Mgr.
VeriSign, Inc.  http://www.verisign.com
408-967-0365
mwatts@paypal.com
```

We recommend that you download the *VeriSign Payment Services: Payflow Link User's Guide* and the *VeriSign Payment Services: VeriSign Manager's User's Guide* to help you to process transaction credits and reporting. These can be found within VeriSign's documentation on their website:

https://manager.paypal.com/home.do

If you prefer, the Turbo Support Manager can eMAIL the documents to you as attachments.

VERISIGN PAYFLOW LINK SETUP ON TURBO

Your VeriSign Payflow Link account must be live before your Turbo site can be enabled for credit card processing. You, the owner, or the Turbo Support Manager must contact VeriSign to activate your Payflow Link account. You will receive an eMAIL confirmation from VeriSign when your Payflow Link account has actually been taken live.

The following VeriSign Payflow Link information must be made available to the Turbo Support Manager to establish a VeriSign Payflow Link on your Turbo site. The Turbo part of the setup may be done while you are finalizing your VeriSign Payflow Link Account.

VERISIGN PAYFLOW LINK ACCOUNT ID AND PASSWORD AND PARTNER:

Ther Turbo Support Manager will initially need your Account ID and the password to configure the Payflow Link information. You can change the password after the account is live. If you get your account from a VeriSign "Partner" (*e.g.*, American Express) rather than directly from VeriSign, please supply the "Partner" name to the Turbo Support Manager as well.

VERISIGN DISPLAY OPTIONS:

Your VeriSign Display Receipt Header and Footer messages will appear on the receipt web page within VeriSign for credit card orders.

Example of a Display Receipt Header message:

> Thank you for placing your order on our Turbo Marketing Network. We strive to make your ordering process as convenient as possible. <<embed Company Name>> is a direct marketing organization with a full suite of products and services available. For additional information about our products, please call <<embed Sales phone number>>.

Example of a Display Receipt Footer message:

> Thank you for your order. If there is anything else that <<embed Company Name>> can help you with, please call <<embed Sales phone number>>.

VERISIGN EMAIL OPTIONS:

VeriSign eMAIL options determine what VeriSign receipt eMAILs are generated and the content for credit card orders.

Decide whether you want the customer to receive an **eMAIL receipt** generated from VeriSign following an order. Your choices are “Yes” or “No.”

The **From Merchant** eMAIL address will appear on the VeriSign receipt eMAIL sent to the customer. This identifies your company as the sender of the eMAIL. This address will receive the eMAIL message, should a customer reply to the eMAIL sent from VeriSign. We suggest this be the eMAIL address of your Accounting department.

> Example of a “From Merchant” eMAIL address:
> `accountingemail@yourcompany.com`

The **To Merchant** eMAIL address(es) will receive a copy of the customer’s VeriSign eMAIL receipt. You may select up to two eMAIL addresses. These addresses are optional.

> Example of a “To Merchant” eMAIL address:
> `custservemail@yourcompany.com`

The **Header and Footer eMAIL** messages appear on the VeriSign receipt eMAIL sent to the customer.

> Example of an eMAIL receipt header message:
>
> > Thank you for placing your order on Turbo-Marketing.net. The following is a receipt for your order. Please retain this eMAIL for your records.
>
> Example of an eMAIL receipt footer message:
>
> > Thank you for your order. If there is anything else that <<embed Company Name>> can help you with, please call <<embed Sales phone number>>.

CHANGES TO YOUR VERISIGN PAYFLOW LINK ACCOUNT INFORMATION

Your company's VeriSign Payflow Link account is yours to maintain. However, your Payflow Link information within VeriSign is configured specifically to function with your Turbo site. Most of the information set up for your Payflow Link should NOT be modified.

Below is a list of information that you may change without negatively impacting your Turbo site, and of what should *not* be altered.

Please notify the Turbo Support Manager if you make *any* changes to your VeriSign account.

Payflow Link Information you **can** change:

- "Transaction Processing Mode" (LIVE vs TEST) within the Form Configuration. See the "2.4.4. Testing Procedures" subsection of this manual for details before altering this mode.
- "Receipt Display Options" (Header and Footer text). This information is initialized by the Turbo Support Manager when your site was established/updated with VeriSign capabilities.
- "EMAIL Options" (Receipt to Customer, From/To Merchant eMAIL Addresses, eMAIL Receipt Header and Footer text). Be careful when updating eMAIL addresses to ensure a valid address is supplied. This information would have been supplied on the "Owner Checklist" and initialized by the Turbo Support Manager when your site was established/ updated with VeriSign capabilities.

Payflow Link Information you **should not** change:

☹ Any Form Configuration information (URLs, billing information, and shipping information). The Transaction Process Mode is the only item in this area that you could consider temporarily changing, if necessary.

☹ Any "General Display Options" information.

☹ Any "Security Options" information.

☹ If you feel a need to change any of the information listed here, please contact the Turbo Support Manager before making any change.

Any questions regarding changes to your VeriSign account should be directed to the Turbo Support Manager.

2.4. Taking Your Private Label Site "Live"

Once your Private Label Turbo Site has been established, the Turbo Support Manager will contact you to schedule a thorough "Walk-Thru" of your new Private Label site.

If you have chosen to enable VeriSign credit card processing on your Turbo site, you must have the VeriSign Payflow Link account in *live* mode. If this has not been done, please notify the Turbo Support Manager.

Note: You may also want to change your VeriSign password after the account is live and your "Walk-Thru" has been completed. Contact the Turbo Support Manager for assistance, if necessary.

2.4.1. Owner "Walk-Thru"

The Owner "Walk-Thru" is a training session that highlights the functionality within the Turbo site that comes with being an Owner. All individuals at your company who will be involved in maintaining your Private Label customer accounts, agents, and/or pricing should be available for this training.

The Turbo Support Manager will provide all the information you need to get up and running. In addition, you will receive your Owner Manager and test customer information and agent logins and passwords at this time.

Your "Walk-Thru" will cover the following topics:

- View customer counts and orders on the Turbo List order side of the site to experience the additional functionality available only to Owner Managers.
- Review customer and Owner invoices.
- Learn how to establish and maintain customer accounts.
- Learn how to establish and maintain agents for your customers, as well as for your own company.
- Review the various levels of security within the Turbo system.
- Review the different pricing levels within the system, and learn how to establish and maintain these prices. This includes your Owner Cost, System, and Customer Level Pricing, as well as establishing special customer quotes.

2.4.2. Trying Out Your New Site

Your Private Label Turbo Site is now live and available on the internet. Online Registration to your site is also active now if you chose this feature.

Owners should adjust their System Standard and System Minimum Pricing as soon as possible. Established using Owner Pricing as a default, these pricing lists are now fully available for you to modify to your company's needs.

The next step would be to run a few tests to see what your customers will experience. You should verify your invoices to check for the company name and address information . Also, be sure to verify that your site's Contact Information includes the proper eMAIL addresses and phone numbers. See the "2.4.4. Testing Procedures" section below for details on running test orders.

Create your customers and agents, and set specific customer pricing as needed. See "Managing Accounts " section 3 of this manual for details.

2.4.3. Links to Your New Site

Owners must link their company website to the Turbo site. This link must be direct to your Turbo site URL (http://xxxxxxxx.turbo-marketing.net). Owners may choose to have the link open up a new browser window or replace the current browser window. Remember that when customers logoff the Turbo site, they will be returned to the website identified as the Logoff URL, typically your company website.

This example will open a new browser window without browser buttons.

```
        <html>
        <head>

         <!---    insert this script within javascript  →

<script language="JavaScript" type="text/JavaScript">

function MM_openBigWindow(theURL,winName,features) {
w=800
h=600
if (window.screen) {
        w = window.screen.availWidth-15;
        h = window.screen.availheight-50;
        }

window.open(theURL,winName,features+',width='+w+',height='+h+',top=0,left=0'
);
}

</script>

</head>

<body>

<!---        use this for link to turbo site  →


<a href="#"
onClick="MM_openBigWindow('http://www.turbomarketing.net','TurboMarketing','
toolbar=no,location=no,status=yes,menubar=no,scrollbars=yes,resizable=yes')"
>Turbo Marketing Net</a>



</body>

</html>
```

Change shaded text as needed. The Turbo Support Manager can eMAIL this script to you if you choose.

To link directly to the Turbo registration page from your website, link to the URL http://xxxxxxxx.turbo-marketing.net/listorder/registration.htm where xxxxxxxx is your own Private Label Site ID.

Do NOT build into your company website any links to other parts of the Turbo site.

2.4.4. Testing Procedures

Any "test" order must be coordinated with the Turbo Support Manager. Tell the Turbo Support Manager *in advance* for any test order that is to be run so the order can be canceled and not charged to your account.

The Owner Manager is required to run any tests under the test company set up under the Owner Manager at implementation to avoid confusion with counts and orders actual customers did or did not make. An Owner Manager has the ability to change the test customer from a "VeriSign" customer to a "non-VeriSign" customer to test both types of customer order from this test company. See the "3.2. Manage Customers – Add/Modify a Customer" subsections of this manual for details.

VeriSign Considerations:

Please notify the Turbo Support Manager if you wish make *any* changes to VeriSign.

The VeriSign PayFlow Link Account is normally set to a "LIVE" Transaction Processing Mode. If a test order is run under your Private Label Turbo Site using a VeriSign customer while in the LIVE mode, you must back out and credit the charges according to the *VeriSign Manager's Guide*.

Owner Managers may optionally choose to temporarily put the Payflow Link Account into a "TEST" Transaction Processing Mode for a specific test, with the following considerations:

- When your PayFlow Link Account is in the TEST mode, ***all*** existing VeriSign customers (and any new online registrations) will be directly affected if they try to order during this time. They will fail when they enter a valid credit card number, leaving their order in a pending status.
- Using any credit card number other than one of the VeriSign test credit card numbers while in the TEST mode will cause an error message or Invalid Account Number. (The list of valid test credit card numbers can be found on the VeriSign Manager Help screen.)
- The processing platform on the Turbo site is unaware of the TEST mode and will be handled the same as for any live order.
- You must change back to the LIVE mode when finished with testing to allow actual funds to be transferred.

Consider all of the above issues before changing your Payflow Link account from "LIVE" to "TEST" mode.

Closely monitor any such test, and return the account to "LIVE" mode as soon as possible to ensure the least disruption to your Turbo site.

2.5. Owner Privileges

A **Regular Customer Agent** is assigned to a customer account and may view and process only counts and orders that he/she created.

A **Supervisor Agent** is assigned to a customer's account and may view and process all counts and orders created under that customer account, regardless of which customer agent created them. A Supervisor agent will also be able to create and modify agents assigned to that customer account.

A **Owner Manager** is assigned to the Owner's account and may view and process all counts and orders under *any* customer's account. An **Owner Manager** is also able to create and modify customer accounts and agents, and may (optionally) be able to create and modify System and Customer Level Pricing and Quotes.

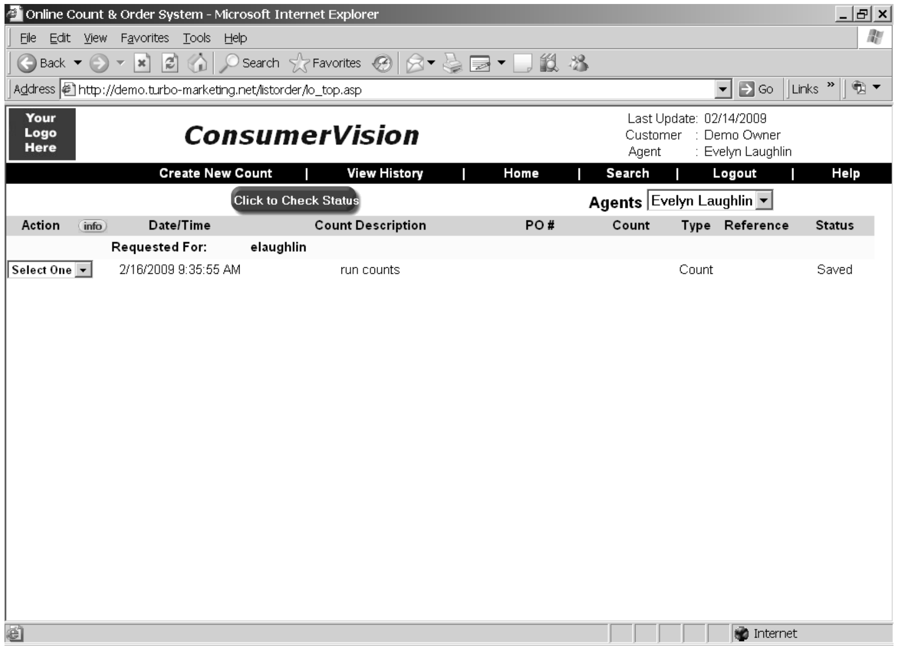
An **Owner Agent** is assigned to the Owner's account and may view and process all counts and orders under *any* customer's account. If an Owner Agent is running a count under the Private Label customer, they can optionally be restricted from seeing pricing or ordering, but they will see pricing and be able to order under any other customer.

An Owner Manager has access to special functionality within Manage Accounts, where they can add and maintain agents, customers, pricing, and promotions.

2.5.1. Viewing Customer Counts and Orders

There are occasions where the Owner Manager or Owner Agent will have to manage the order history of customer agents. This may include troubleshooting what a customer agent did on an order, removing old outdated counts, or reassigning them to another customer agent. Turbo provides this flexibility.

The Owner Manager and Owner Agent have special privileges on the Turbo View History screen. The Owner Manager or Owner Agent can view any customer account that exists within their Turbo site. The Owner Manager / Owner Agent can select any customer from the pull down menu. After the Owner Manager / Owner Agent selects a customer and *clicks on the Click to Check Status button*, the Owner Manager / Owner Agent can select an agent from the pull down box that relates directly to the customer selected. Once the agent has been selected and the *Click to Check Status button clicked again,* that agent's activity will be displayed.



The Owner Manager is able to select and perform any Action to any order for that customer agent. Thus, the Owner Manager has complete control when it comes to managing their customers' accounts for troubleshooting and managing order reassignments.

An Owner Manager does not need to set up company employees as agents for each customer. **Owner Managers** and **Owner Agents** can access the agent history for all the Owner's customers. When an Owner Manager or Owner Agent is logged onto the system, Turbo automatically includes all **Owner Managers** and **Owner Agents** in a pull-down menu for all customers. If an Owner Manager or Owner Agent needs to perform a count or other action on behalf of a customer, they can locate their own agent name within the pull-down menu and run the count/order under themselves.

An **Owner Agent** can also perform a count or other action on behalf of a customer by locating their own agent name within the pull-down menu and then running the count/order under themselves.

WARNING! **If both an Owner Manager / Owner Agent and a Customer agent select the change action for the same count at the same time, both will be able to see the pages associated with that count, but only one can change or submit the count. If both make changes at the same time, results are unpredictable.**

2.5.2. Billing and Invoicing Private Label Accounts

Online Billing and Invoicing is an easy, convenient way to manage a Private Label account. Your customer's agent will receive an invoice by eMAIL, and a copy of that invoice showing your costs will be eMAILed to your designated Accounting eMAIL address. Owners will also receive a monthly statement with each invoice listed on the statement.

Invoices should be reviewed within 30 days of receipt in order for adjustments to be possible.

When an order has been paid by credit card using VeriSign, the customer's agent receives the invoice with a notation that the invoice is paid. The same notation is included on the Owner's invoice.

INVOICE SAMPLES

Customer Invoice (non-VeriSign)

```
Invoice
DEMO OWNER COMPANY                                Invoice Date   : MM/DD/CCYY
456 WASHINGTON ST
OMAHA NE 68102                                    Invoice Number : C3H00039
PHONE (402) 444-5555
                                                  Reference Number : X305809

Sold To       : DEMO TEST CUSTOMER
                123 MAIN ST
                OMAHA, NE 68114

Customer ID   : DEMOTES

Project       : phones in IA


Item                                   Quantity       Rate     Total Amount

CONSUMERVISION LIST RENTAL             30,000        .03500       1,050.00
CV PHONES ON OUTPUT                    30,000
ELECTRONIC OUTPUT MINIMUM                   1      25.00000          25.00

                                                  Total          1,075.00
```

Owner Invoice (non-VeriSign)

```
Invoice
DEMO OWNER COMPANY                                 Invoice Date   : MM/DD/CCYY
456 WASHINGTON ST
OMAHA NE 68102                                     Invoice Number : C3H00039
PHONE (402) 444-5555
                                                   Reference Number : X305809

Sold To       : DEMO TEST CUSTOMER
                123 MAIN ST
                OMAHA, NE 68114

Customer ID   : DEMOTES

Project       : phones in IA


Item                                  Quantity       Rate     Total Amount

CONSUMERVISION LIST RENTAL            30,000        .03500       1,050.00
CV PHONES ON OUTPUT                   30,000
ELECTRONIC OUTPUT MINIMUM                  1      25.00000          25.00

                                                 Total          1,075.00


    Cost to Account Owner


    Reference Number : B305809


CONSUMERVISION LIST RENTAL            30,000        .02500         750.00
CV PHONES ON OUTPUT                   30,000
ELECTRONIC OUTPUT (FTP EMAIL)         30,000                        15.00
                                                 Total             765.00
```

Customer Invoice (VeriSign)

```
Invoice
DEMO OWNER COMPANY                                 Invoice Date   : MM/DD/CCYY
456 WASHINGTON ST
OMAHA NE 68102                                     Invoice Number : C3H00039
PHONE (402) 444-5555
                                                   Reference Number : X305815

Sold To        : DEMO TEST CUSTOMER
                 123 MAIN ST
                 OMAHA, NE 68114

Customer ID    : DEMOTES

Project        : New Loans


Item                                   Quantity        Rate     Total Amount

CV HOME/MORTGAGE LIST                   4,745        .03500         166.07
LOAN AMT CODE                           4,745        .01000          47.45
GRANT DATE                              4,745        .01000          47.45
CV NTH SELECT                               1
ELECTRONIC OUTPUT MINIMUM                   1      25.00000          25.00

                                                  Total             285.97

*** Invoice has been Paid by Credit Card
```

Notice the `*** Invoice has been Paid by Credit Card` message at the bottom of the invoice.

Owner Invoice (VeriSign)

```
Invoice
DEMO OWNER COMPANY                                Invoice Date   : MM/DD/CCYY
456 WASHINGTON ST
OMAHA NE 68102                                    Invoice Number : C3H00039
PHONE (402) 444-5555
                                                  Reference Number : X305815

Sold To        : DEMO TEST CUSTOMER
                 123 MAIN ST
                 OMAHA, NE 68114

Customer ID    : DEMOTES

Project        : New Loans


Item                                   Quantity       Rate     Total Amount

CV HOME/MORTGAGE LIST                   4,745        .03500          166.07
LOAN AMT CODE                           4,745        .01000           47.45
GRANT DATE                              4,745        .01000           47.45
CV NTH SELECT                               1
ELECTRONIC OUTPUT MINIMUM                   1      25.00000           25.00

                                                 Total               285.97

*** Invoice has been Paid by Credit Card
          Transaction ID :     VEYA95111189


    Cost to Account Owner


    Reference Number : B305809


CV HOME/MORTGAGE LIST                   4,745        .02500          118.63
LOAN AMT CODE              C022         4,745        .00900           42,71
GRANT DATE                 D001         4,745        .00900           42.71
ELECTRONIC OUTPUT (FTP EMAIL)           4,745      15.00000           15.00

                                                 Total               219.05
```

Notice the *** Invoice has been Paid by Credit Card message on the invoice.

2.5.3. Order Disputes

CANCELED JOBS

A customer may order a list and realize that they did so incorrectly. The Owner Manager must contact the Turbo Support Manager to make the necessary adjustments to the canceled order. A cancellation charge may be applied.

HOLD PROCESSING

On the Turbo system, the message Please Contact Us Regarding Your Account appears when an agent attempts to login, and the Private Label Owner account has been placed on Hold. No further counts or orders can process until the customer is released from Hold status. The customer will need to contact the Private Label Owner to remedy this issue. Please refer to the "3.2. Manage Customers" subsection of this manual for details on the Customer Status field and putting a customer on or off "Hold."

2.6. Online Registration

The Online Registration feature of the Turbo site enables new customers to access your site, register an account, and order — all without any intervention on your part.

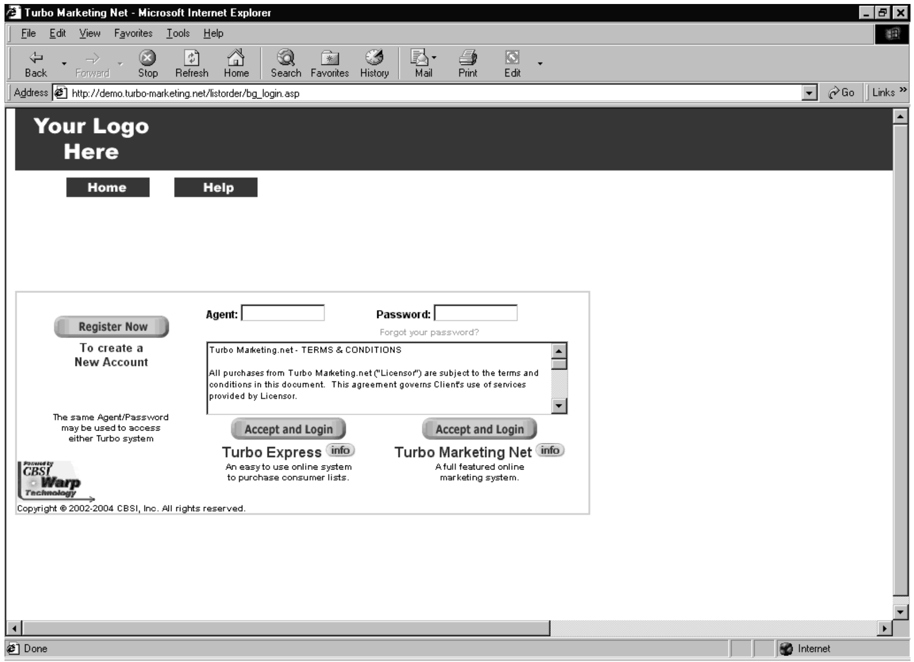
If you choose to allow Online Registrations on your site, your Turbo Login screen will include the To Create a New Account text and the Register Now button.

You may also choose to prohibit Online Registrations entirely from your site. If your site prohibits Online Registration, this area of the Login screen will be blank.

The Online Registration process, when enabled, will create:

- A **new customer account** based on the information supplied by the new agent.
  - These accounts will be established automatically as a "VeriSign" type of customer who is required to pay by credit card, if there is a VeriSign Payflow Link established on your site. They cannot order more than 50,000 records and are limited to one order until the Owner changes the registration type from New Registration to Regular.
  - If your site does not have VeriSign established, the system will allow new customers to register online only as a "Prospect," limiting them to running counts — but no orders. You may change the Prospect Customer account status to Regular Customer to allow them to run orders at a later time, if you so choose.
  - All accounts created through the Online Registration process will initially default to your System Standard Pricing. You may establish customer-specific pricing for these customers at a later time, if you so choose.
- A **new agent** under that customer account based on the information supplied by the agent.
- An **eMAIL notification** to your Sales Department of the new account so that they know to follow up with that customer.

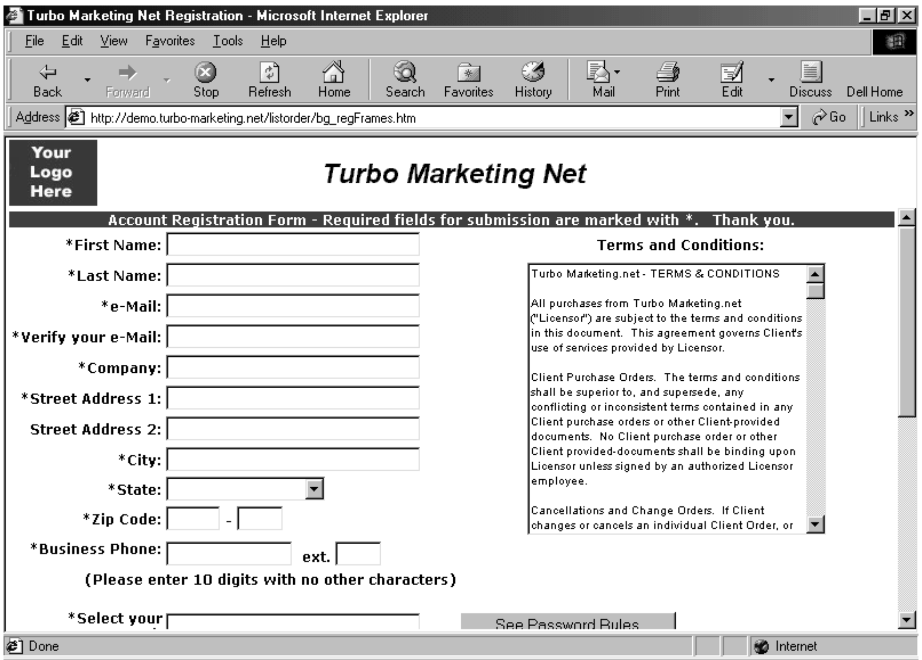
Example of a Turbo Login screen with Online Registration allowed:



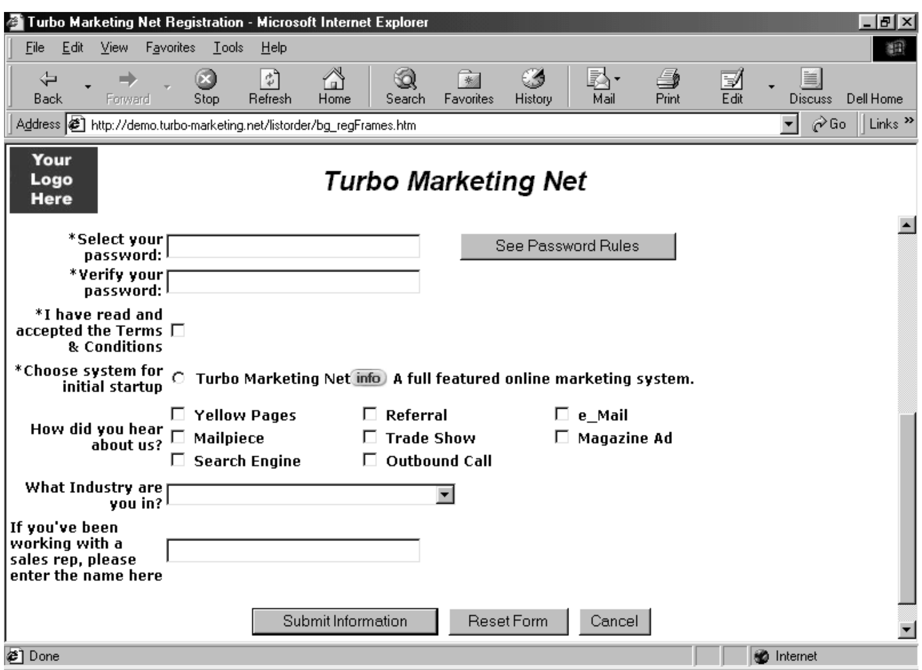
2.6.1. Account Registration

When a new customer clicks on the Register Now button, an account registration screen appears for them to fill out. This screen includes an area for the customer to state how they heard about you and to identify a salesperson that they may have been working with. All information on this screen will be included in the eMAIL that is sent automatically to your Sales Department eMAIL address.

Online Account Registration screen (top):



Online Account Registration screen (bottom):

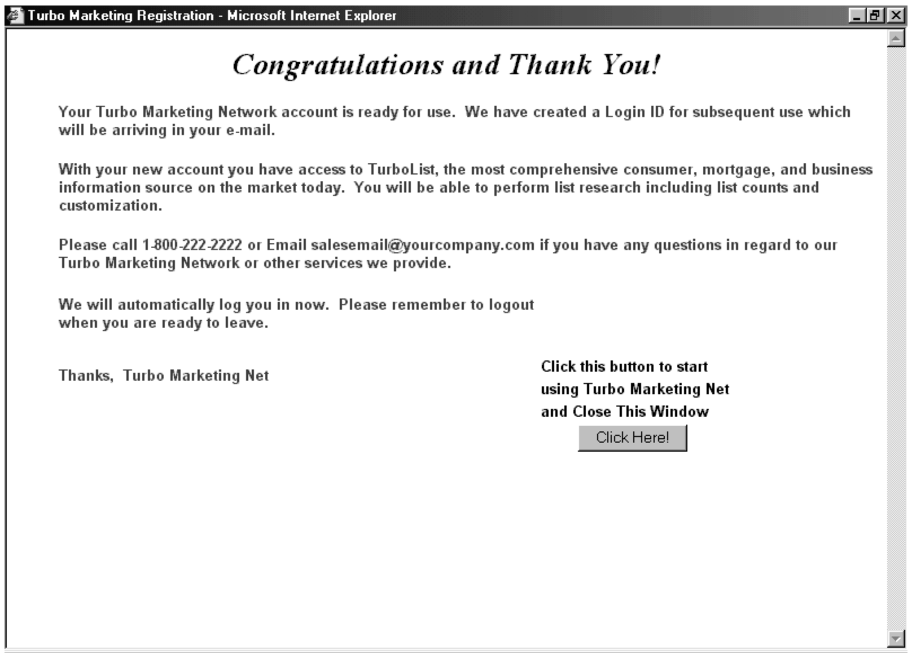


You may choose to allow the system to assign a valid password at registration time or let the customer choose a password.

2.6.2. Account Registration Confirmation

Upon successful completion of the registration screen, your new customer will be shown the following confirmation screen. Your Sales phone number and eMAIL address, established as your site's Sales Contact Information, will be inserted within the message.

Clicking on the button will log them into your Turbo site under the new customer and agent. Confirmation of the successful login will display:



REGISTRATION REJECTIONS

An Online Registration may be rejected if the customer account already exists or if the agent already has a login with an existing customer account with the same eMAIL address.

Please refer to the "4.3. Registration Problems" subsection of the "Common Questions, Errors, and Requests" chapter in this manual for details on the resolution of these problems.

2.6.3. Customer Registration Confirmation eMAIL

New customers will also receive an eMAIL containing their new account information, The customers should keep this eMAIL confirmation for future reference. Your Sales phone number and eMAIL address will be inserted within the message, as well as a link to your Turbo site.

New (Full) Account Registration EMAIL sent to the customer:

```
From: "Turbo Marketing Net" <salesemail@yourcompany.com>
To: "John Smith" <jsmith@xxxxxx.com>
Subject: Turbo Marketing Net - New Agent Registration
Date: Wed, 19 Nov 2003 16:33:00 -0600

Congratulations and Thank You!

Your Turbo Marketing Net account is ready for use.  We have created a Login
as follows:

Agent:          jsmith
Password:       letsgo7

With your new account you will have access to the most comprehensive
consumer, mortgage, and business information source on the market today.
You will be able to perform list research including list counts and
customization.

If you wish to use FTP for the delivery of output from orders, our site
address is ftp.turbo-marketing.net.
Detailed instructions can be found at http://ftp.turbo-
marketing.net/ftpinfo.html.

When logging into our ftp site, the following FTP Login ID and
Password will be required:

FTP Login ID:   democomp
FTP Password:   sales201

If you are a reseller of lists, or wish to discuss pricing, alternative
billing methods or learn about other services we provide, please call
1-800-222-2222 or (your Sales number here) or email to
salesemail@yourcompany.com

Thank you,
Turbo Marketing Net
http://xxxxxx.turbo-marketing.net
```

New Account Registration EMAIL sent to the *Prospect Only* customer:

```
From: "Turbo Marketing Net" <salesemail@yourcompany.com>
To: "John Smith" <jsmith@xxxxxx.com>
Subject: Turbo Marketing Net - New Agent Registration
Date: Wed, 19 Nov 2003 16:33:00 -0600


Congratulations and Thank You!

Your Turbo Marketing Net account is ready for use.  We have created a Login
as follows:

Agent:         jsmith
Password:      letsgo7

With your new account you will have access to the most comprehensive
consumer, mortgage, and business information source on the market today.
You will be able to perform list research including list counts and
customization.

If you are interested in ordering one of your counts, please email
salesemail@yourcompany.com with the reference number.

Thank you,
Turbo Marketing Net
http://xxxxxx.turbo-marketing.net
```

2.6.4. Sales Registration Information eMAIL

Your Sales Department, based on your site's Sales Contact Information, will receive an eMAIL for any Online Registrations that occur on your site. This will provide the information a salesperson will need to follow up with the new customer. The Sales Rep information at the bottom of the eMAIL, when supplied by the new customer, helps identify what salesperson should follow up with the customer.

New Account Registration eMAIL sent to the Owner's Sales Department:

```
From: "Turbo Marketing Net" <salesemail@yourcompany.com>
To: "Turbo Marketing Net" <salesemail@yourcompany.com>
Subject: Turbo Marketing Net - New Agent Registration
Date: Thu, 31 Jul 2003 16:33:43 -0500


New Turbo-Marketing Net Registration

Agent Name:                    John Smith
Employer ID:                DEMOCOMP
Customer Name:         Demo List Company
Address:                       1234 MAIN STREET
Address:
City:                          OMAHA
State:                         NE
Zip Code:                      68134 000
Phone:                         (402) 555-1212 Ext 9876
E-Mail Addr:                   jsmith@xxxxxx.com
Referred By:                   Yellow Pages - Y
                             Referral ----- N
                             E-Mail ------- N
                             Mail --------- N
                             Trade Show --- N
                             Magazine ----- N
                            Search Engine- N
                             Outbound Call- N
Industry Code:              BRKR
Sales Rep :  George Smith
```

2.7. Purging Counts, Orders, and Accounts

The Purge Process of the Turbo site automatically removes old and inactive counts, orders, agents, and customers from your site, so you can better manage your active ones.

The Purge Process occurs weekly, and will address the following:

- **List Counts and Orders**, including all reports, invoices and zip files.
    - Counts with a date ***over 6 months old*** will be purged from the Turbo system.
    - Orders with a date ***over 13 months old*** will be purged from the Turbo system.
- **Appends**, including all reports, invoices, *etc.*
    - Appends with a date ***over 6 months old*** will be purged from the Turbo system.
- **Account Agents and Customers**, that have no counts, orders, nor appends remaining within the Turbo site.
    - Agents that have had no activity ***in over 13 months*** will be purged from the Turbo system. They have not logged in to the system, nor has any activity occurred under their agent by another user in this timeframe.
    - Customers that have had no activity ***in over 13 months*** will be set to "Inactive." This customer has no agents remaining, no agent has logged into the system, nor has any activity occurred for this customer by another (Owner) user in this timeframe.
    - Customers that have had no activity ***in over 5 years*** will be purged from the Turbo system.

Prior orders where the Keep History box was checked are ***retained for 9 months*** from the date ordered.

3. Managing Accounts

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3.2 Manage Customers
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3.2.2. Modify a Customer
3.2.3. Reassign Count to Owner
3.2.4. Reassign Count to Another Customer
3.3. Manage Agents
3.3.1. Agent Security User Roles
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3.3.3. Modify an Agent
3.3.4. Delete an Agent
3.3.5. Reassign Activity to Another Agent
3.4. Manage Pricing
3.4.1. Manage Pricing Authority
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3.4.3. Customer Level Pricing
3.4.4. Display Pricing
3.4.5. View/Modify Pricing
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3.1. General Overview

Turbo gives Private Label Owner Managers total control over their customers' accounts. The Manage Account section of Turbo was designed to be simple to set up and use. This section controls three critical areas of your Private Label site: Customers, Agents, and Pricing.

Owner Managers can access the Manage Account section of their Private Label site from the Home page of their Turbo site. A navigation bar appears across the Home page, which includes access to Manage Account (if authorized), Change Password, Logout, and Help. Click on the Manage Account button to access this section of your Turbo site.

An Owner Manager may create customers and agents manually through the Manage Account section of the site and, optionally, customers and agents may be created through the Online Registration feature of the system. *Once created*, all customers and agents within your site will be maintained through the Manage Account section.

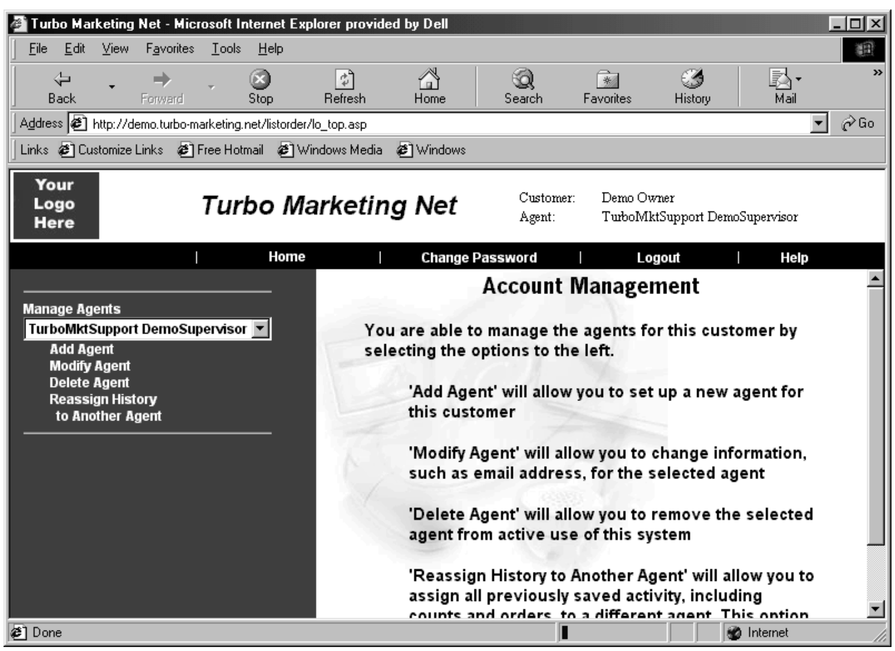
The security role assigned to an agent will dictate what, if any, access that agent has to the Manage Account section of the Turbo site. Refer to the "3.3. Manage Agents" subsection of this chapter for details on the security roles that can be assigned to an agent.

- A Regular Agent has the Manage Account selection suppressed from the display and cannot access this section of the site.
- A Supervisor Agent will have access limited only to the Manage Agents area.
- An Owner Agent is exclusively used for employees of an Owner, but this agent type has no rights within Manage Account.
- Owner Manager status is available to those designated to manage the company's Turbo site. Owner Managers will have access to all three areas of Manage Account (Customers, Agents, and Pricing).

The functions available within the Manage Account areas will also vary, depending upon what customer is selected to "manage." These differences will be covered in detail within each specific area of this chapter.

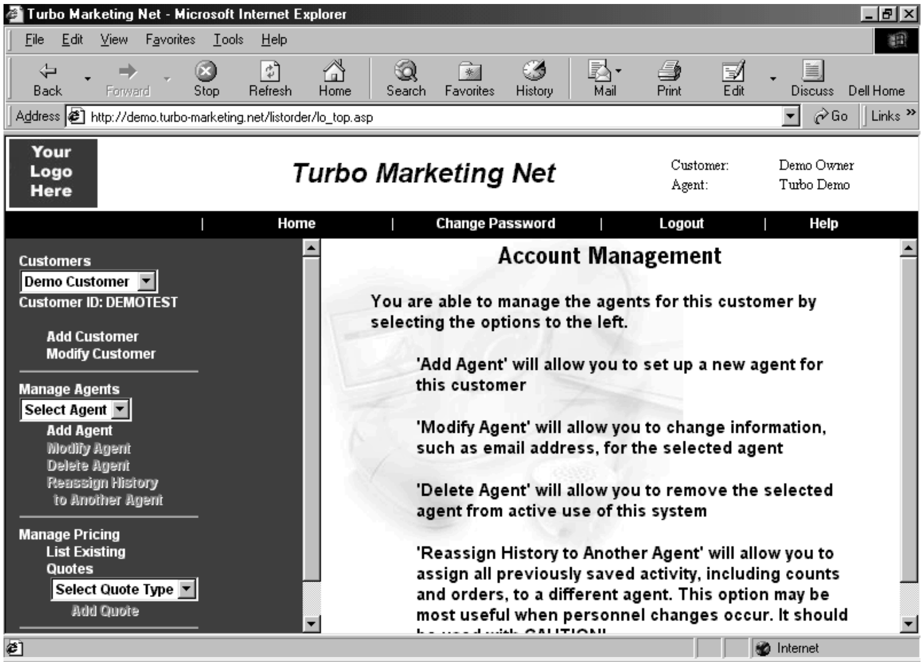
- Selecting the Owner's account will provide additional options that are available only when working within the Owner Manager level, such as reassigning accounts to another customer.
- Selecting a Customer will provide some options not applicable to the Owner Manager level, such as adding price quotes.

The example of the Manage Account display for a **Supervisor Agent** will be the same display regardless of whether the Supervisor agent is under the Owner account or under a customer:



Managing Accounts

Example of the Manage Account display for an **Owner Manager** with a **Customer** selected (Notice the Quotes/Add Quote feature under the Manage Pricing area.):



3.2. Manage Customers

The Customers area of the Manage Account section of a Turbo site provides total control of customer accounts. It enables you, as an Owner Manager, to create new customer accounts, modify information on existing accounts (such as name and address information, phone numbers, *etc*.), put a customer on hold, and transfer counts from the Owner to one of your customers. Regardless of whether you added the customer yourself or the customer was created through your Online Registration process, all your customer information is available to you under the Manage Customer area. You also have the ability to maintain your own Owner Manager's account information.

Within the Manage Account section of the site, the Manage Customer area is available only to Owner Managers.

Functions available within this customer area will vary depending upon what customer is selected (*e.g*, Owner vs. customer).

- The Add Customer function will always appear.
- Whatever customer is selected will control all the other areas under Manage Account.
- Agents and pricing will pertain exclusively to the customer selected here.
- The Modify Customer function will appear any time a customer has been selected.
- The Reassign Count to Another Customer function will appear only when the Owner is selected as the customer.

To select a Customer, click on the Customers drop-down box on the left of the screen. Customers are listed in alphabetical order by company name. If your list of customers is long, a scroll bar will be included with your drop-down box. You may enter the first character of the company name to advance the drop-down list to company names that begin with that character. Select the company by clicking on the company name.

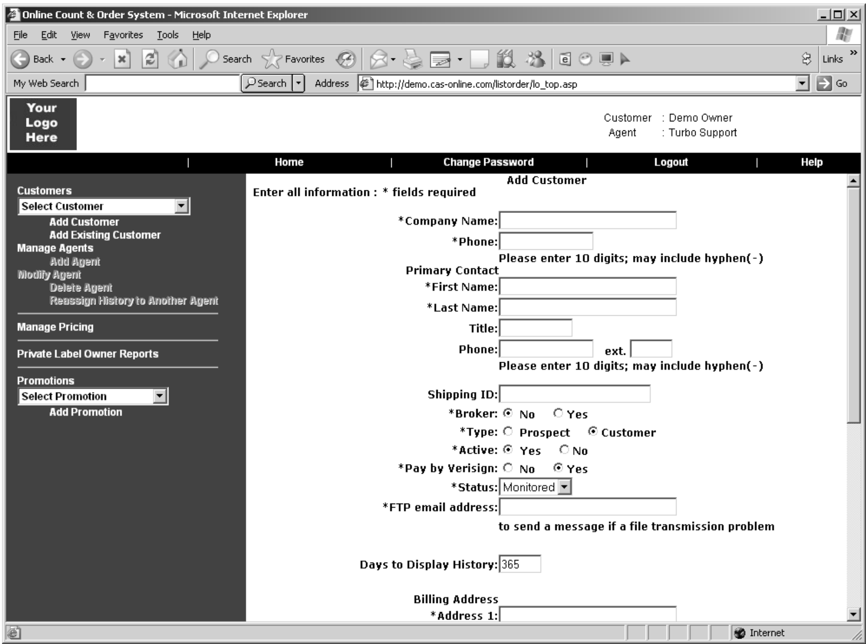
NOTE: Customers that have been inactivated by the Purge Process (see section "2.7. Purging Counts, Orders, and Accounts" in this manual for details) will appear gray in the drop-down box.

When a customer account is created, the account will be assigned a unique ID. This Customer ID appears under the customer's name when it is selected for account management. All agents, pricing, and orders are tied to this unique customer ID. The Customer ID may be used to properly identify the customer if you have two or more with similar names.

3.2.1. Add a Customer

Customers may be created through the Manage Account section of your site, or they may be created through the Online Registration process, if your site allows this. (See the "2.6. Online Registration" section of this manual for details.)

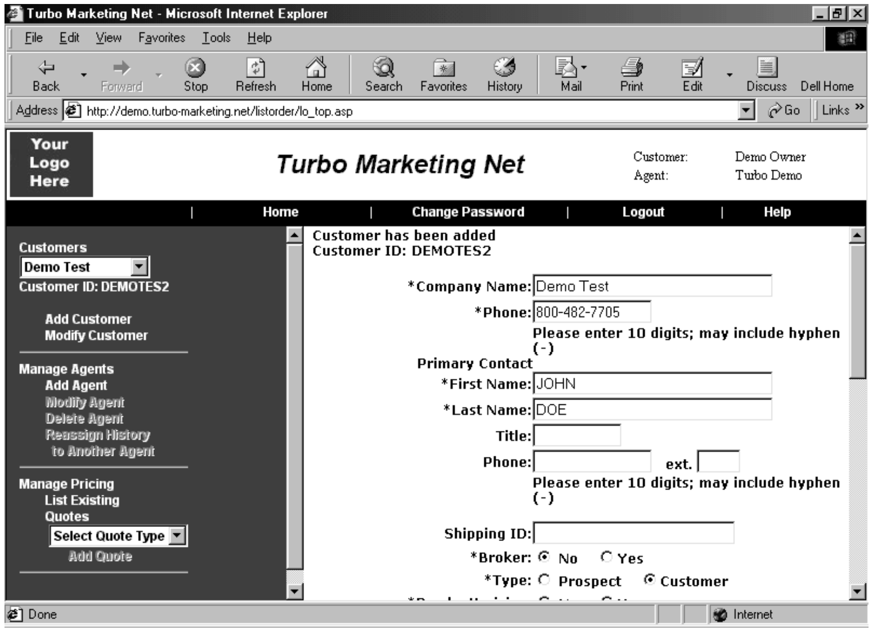
To create a new customer account through Manage Account, click on the Add Customer line on the left navigation menu, and the following screen will appear. Once a customer is added, that customer cannot be removed. You can suspend a customer, but *not* delete a customer.



Complete the information on the screen. You will need to scroll down to access all of the customer information required. At the bottom of the form is the Add Customer button. You must click on this button or hit the Enter↵ key to actually complete the creation of your new customer account.

If any of the required information is not supplied, a message box appears to notify you that more information is required. The cursor will be positioned to the field with the error.

Once all the required information has been supplied and the account created, the customer will be added to the list of customers you may select for account maintenance. The following screen will appear to confirm the add was successful:



The following information explains the customer fields available for maintenance, and how they are used within the Turbo system.

Company Name and Phone Number — required

The company name will appear throughout the Turbo system in the upper right corner of most screens. The company name will also be printed on invoices and packing slips.

While Online Registration blocks adding multiple customers with the same name and ZIP code, companies with the same name as an existing customer company may be added here.

Primary Contact Information — required

The primary contact is the first person who should be contacted in case of questions or problems.

3rd Party Account Number — optional

This is the customer's shipping ID number for FedEx or UPS. This is used when a customer chooses to have all shipping handled as 3rd party shipping so that shipping charges will be billed to this account. This ID value will be the default for the 3rd Party Acct # field on all orders that have physical output and will cause the order to be shipped as 3rd party. The Shipping ID can be blanked out by the customer on the order screen in cases where they do not want to ship 3rd party. A handling fee is charged when this field is used.

Broker — required / defaults

The broker flag indicates whether this customer is known to be a broker.

- *Yes* – Any reports generated from this customer's orders will not include identifiable information of you, the Owner.
- *No* – All reports generated from this customer's orders will include Owner information. This is the default setting when a customer is added through Manage Account.

Type — required / defaults

The customer type flag indicates what type of customer account within the Turbo system.

- *Prospect* – This customer account, and all agents established under this account, are allowed to run counts within the Turbo system, but cannot run any orders. This flag is automatically set to "Prospect" for all customer accounts created through the Online Registration process when the site is set to "Prospect Only" registrations.
- *Customer* – This customer account, and all agents established under this account, are allowed to run counts and orders within the Turbo system. This flag is automatically set to "Customer" for all customer accounts created through the Online Registration process when the site is set to "Full Account" registrations. This is the default setting when a customer is added through Manage Account.

Pay by VeriSign — required / defaults

The VeriSign flag indicates whether this customer is required to pay for all Turbo orders by credit card through VeriSign before any order will be processed.

- *Yes* – This Customer is required to pay for all Turbo orders by credit card through VeriSign. This flag is automatically set to "Yes" for all customer accounts created through the Online Registration process when the site is set to "Full Account" registrations. A valid VeriSign PayFlow Link Account must be established and implemented on your Turbo site in order to set this flag to a YES.

  If an Owner manager initiates an order for a customer with Pay by VeriSign set to YES, credit card processing is bypassed.
- *No* – This Customer will not be required to pay for their orders by credit card through VeriSign at the time they order. The Customer will be invoiced, and payment will be the responsibility of the Owner. This is the default setting when a customer is added through Manage Account.

Status — required / defaults

The Status flag indicates whether the customer is in good standing with you.

- *Regular* – The customer is in good-standing, and there are no restrictions on this customer. This is the default for customers created through Manage Account.
- *Monitored* – The customer is a new customer or should be monitored. This is the default for customers created through the Online Registration process.
- *Hold* – This customer has been put on hold because of problems with the account. No agents under this customer can log in to your Turbo site to run a count or order while the customer is set to a Hold status. When an agent under this customer attempts to login to Turbo, the message Please Contact Us Regarding Your Account! will display, and they will be returned to the Turbo Login screen. Refer to the "2.5.3. Order Disputes" subsection of this manual for additional information.

FTP eMAIL address — required

The eMAIL address provided here will receive a message if there is any problem with a file transmission for this customer. Use caution when entering the eMAIL address to ensure proper delivery of the message. This eMAIL address would typically be set to the Customer Service Department of the customer.

Billing Address Information — required

This primary address information for the customer will appear on invoices.

Shipping Address Information — optional

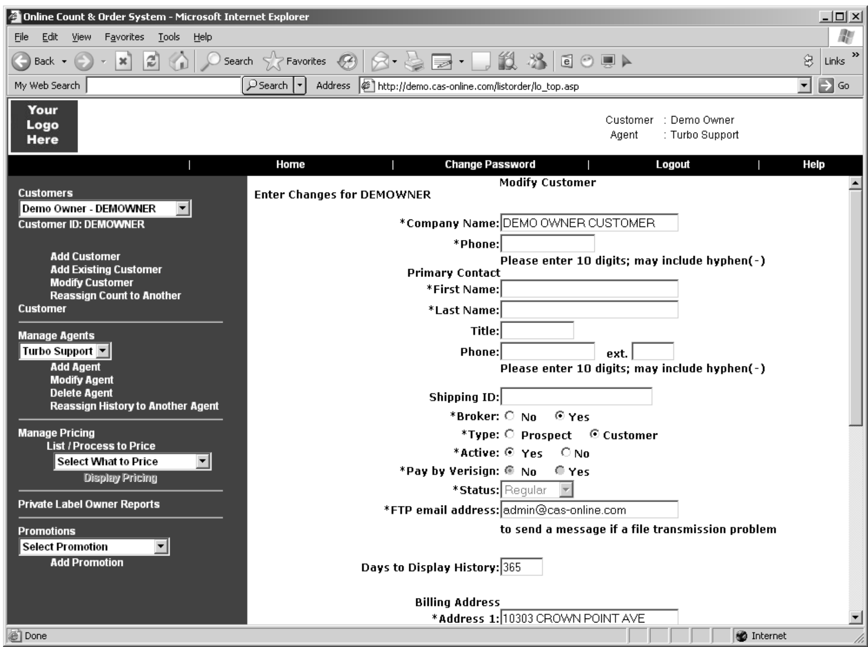
This is the address information to be used to send the packing slips and physical order output. This should be supplied only if this information is different from the Billing Address Information.

3.2.2. Modify a Customer

Whether customer accounts were created through Manage Account or through the Online Registration process, all of them are available for the Owner Manager to maintain in the Manage Customer area.

You may also maintain your own Owner/Customer information, with the exception of the Status field.

To modify (or view) an existing customer's information, first select the customer from the Customers drop-down list on the left of your screen. Select the company by clicking on the name. Click on the Modify Customer line on the left navigation menu, and the following screen will appear:



Enter or overtype the information on the screen. You will need to scroll down to access all available customer information. At the bottom of the screen is the Modify Customer button. You must click on this button or hit the Enter↵ key to actually complete the update to the customer account.

The same requirements for Add Customer apply to Modify Customer. Please refer to that subsection of this chapter for details on the individual fields available for maintenance.

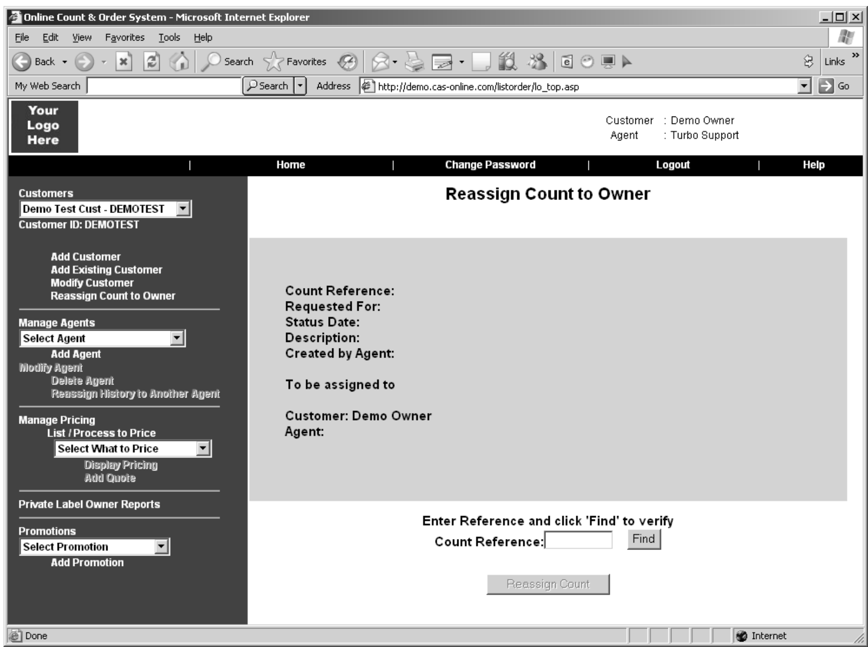
NOTE: Customers that have been inactivated by the Purge Process (see section" 2.7. Purging Counts, Orders, and Accounts" in this manual for details) can be reactivated here by changing Active to YES.

3.2.3. Reassign Count to Owner

The Reassign Count function is available only when the customer is not the Owner.

The Reassign Count to Owner function within Manage Account provides owners flexibility. All the Owner Manager has to do is enter the Count Reference number shown on the View History screen from Turbo List Order. The count referenced then becomes a count that can be managed under the Owner. The count can then be rerun under the Owner to pick up the company name, address, and pricing for the Owner.

To transfer a count from a customer to the Owner, first select the customer from the Customers drop-down list on the left of the screen. Click on the Reassign Count to Owner line on the left navigation menu, and the following screen will appear:



Enter the Count Reference number of the count to be reassigned that is currently residing under the customer.

Information regarding the count specified will be displayed for verification. In addition, a new Select Agent to Receive Count drop-down box will appear for you to select which agent under this Owner should get the transferred count. The list of valid agents will have all agents under the Owner.

The count now is listed under the Owner. As always, Supervisors, Owner Agents, and Owner Managers can access this count regardless of what customer/agent the count is listed under.

The status of the count is changed to “Expired” when it is reassigned, so that the count must be rerun under the Owner before an order can be made. This ensures proper pricing is applied to the count and subsequent order.

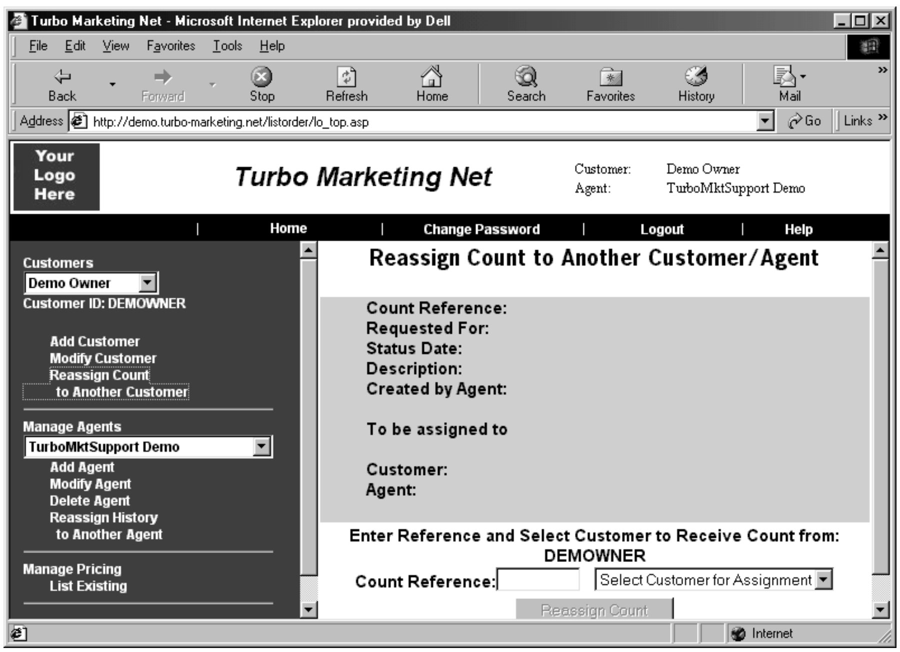
3.2.4. Reassign Count to Another Customer

The Reassign Count function is available only when the Owner is selected as the customer.

Occasionally, customers do not want to run counts and orders themselves and would rather someone within the Owner's company do the processing for them. In these cases, the Owner Manager may choose to run preliminary counts for a customer under themselves (the Owner Manager). Once the customer has decided to order, transfer the count from your "Owner" customer to that specific customer set up on your site.

The Reassign Count to Another Customer function within Manage Account provides owners this flexibility. All the Owner Manager has to do is enter the Count Reference number shown on the View History screen from Turbo List Order and select the customer to receive the count. The count referenced then becomes a count that can be managed under the reassigned customer. The count can then be rerun under the customer to pick up the company name, address, and pricing specific to that customer.

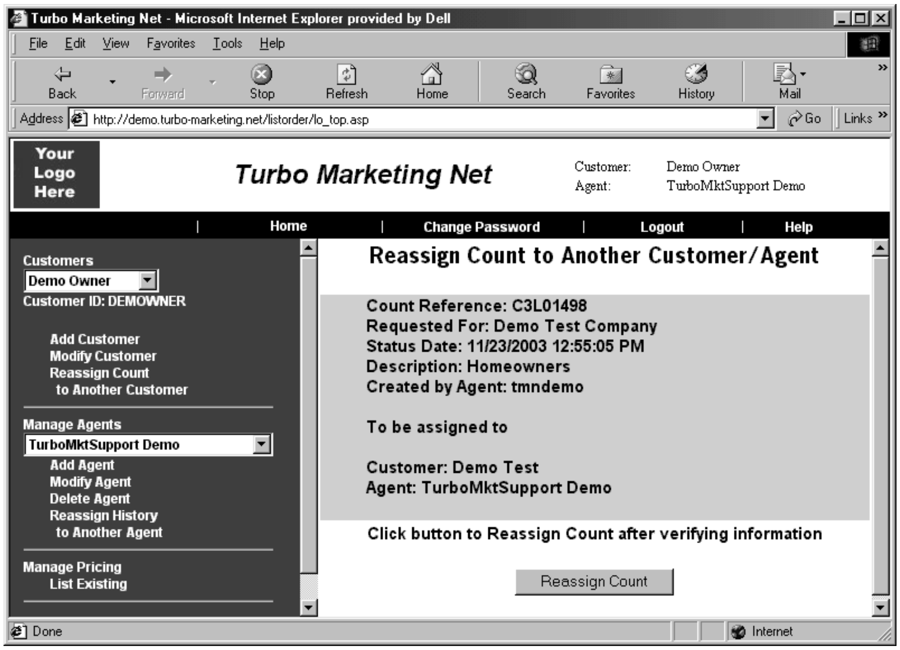
To transfer a count from the Owner to a customer, first select the Owner as the customer from the Customers drop-down list on the left of the screen. Click on the Reassign Count to Another Customer line on the left navigation menu, and the following screen will appear:



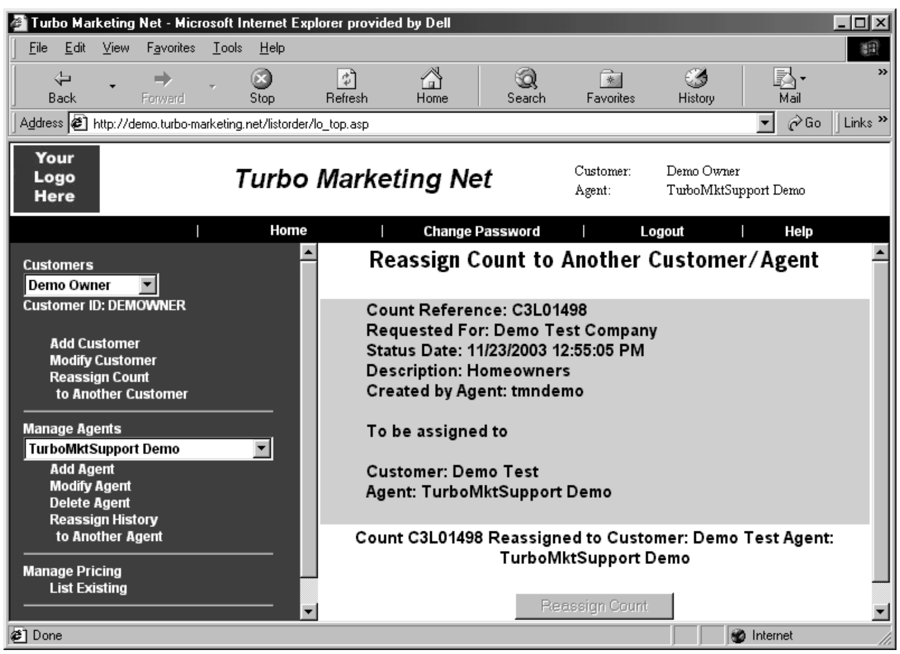
Enter the Count Reference number of the count to be reassigned that is currently residing under the Owner. Then select the customer to which you want to transfer the count from the Customer for Assignment drop-down box which displays the complete list of customers you have established within your site (excluding the Owner).

Information regarding the count specified will be displayed for verification. In addition, a new Select Agent to Receive Count drop-down box will appear for you to select which agent under this customer should get the transferred count. The list of valid agents will have all agents under the receiving customer, as well as all Owner Managers under the Owner.

Once all the count, customer, and agent information has been specified, the following screen displays:



Verify the information presented, and click on the Reassign Count button to complete the process. The following screen confirms the transfer was completed:



The count now is listed under the customer/agent specified and no longer exists under the Owner. As always, Owner Managers can access this count regardless of what customer/agent the count is listed under.

The status of the count changes to "Expired" when it is reassigned, so that the count must be rerun under the new customer before an order can be made. This ensures proper pricing is applied to the count and subsequent order.

3.3. Manage Agents

The Manage Agents area of your Turbo site provides both you, as an Owner Manager, and your customers (if you choose), total control over the customer's agents. You can create a new agent for a customer, change information, such as eMAIL addresses or security settings, and remove an agent from active use on the Turbo site. In addition, you can reassign all previously saved activity, including counts and orders, from one agent to another. This option may be useful when personnel changes occur.

Within the Manage Account section of the site, the Manage Agents area is available to Owner Manager and Supervisor Agents. Supervisor Agents will automatically be pre-set under their own customer and will have the ability to manage only agents under their customer. Owner Managers have access to any agent under any customer.

3.3.1. Agent Security User Roles

The security role assigned to an agent will dictate what, if any, access that agent has to the Manage Account section of the Turbo site, as well as control certain other site functions.

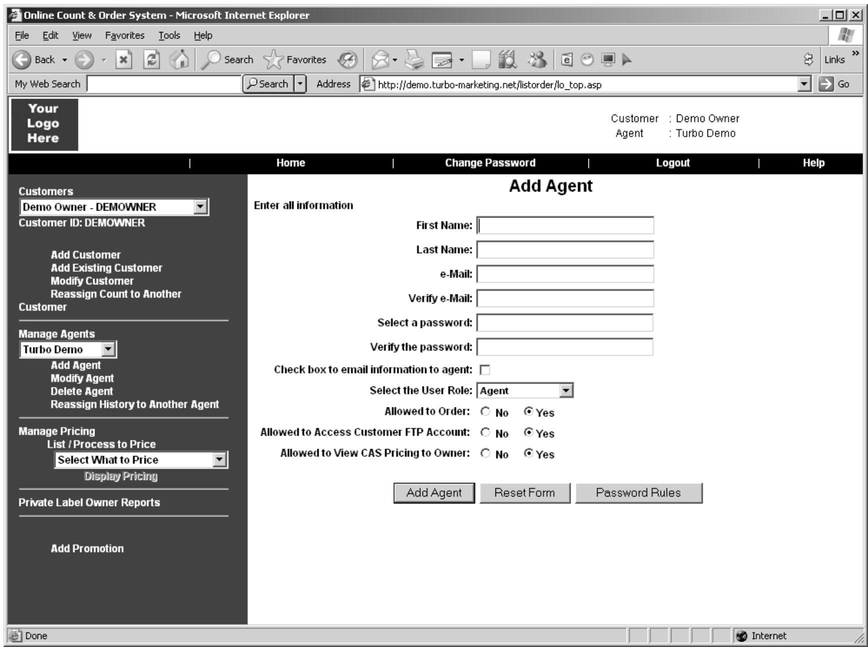
- Agent
  - A Regular Agent level role will **not** have access to the Manage Account section of the site. That choice will not even appear as a selection on the Turbo screen.
  - Regular Agents will have access to the other areas of the site so that they can run counts and/or orders, but they will be able to access only their own counts and orders.
  - Regular Agent is the default setting for anyone who uses the Online Registration process to create an account, and for any agent created through the Manage Agents area.
- Supervisor Agent
  - An agent set up with a Supervisor level role will be allowed to access the Manage Account section of the site, but will have access to the Manage Agents area only for the customer under which they are established.
  - Supervisor Agents will **not** have access to any other customer information (including their own), nor to any pricing information.
  - Within the other areas of the Turbo site, Supervisor Agents are able to access the counts and orders of any agent under their specific company.
  - A Supervisor Agent may only create an agent with Regular Agent security user role within their company.
  - A Supervisor Agent can remove an agent's ability to order counts.

- Owner Agent
  - An Owner Agent can access counts and orders for any company agent, but cannot access Manage Accounts.
  - Owner Agents will **not** have the ability to change to any other customer information (including their own), nor to any pricing information.
  - Within the other areas of the Turbo site, Owner Agents will be able to access the counts and orders of *all agents under any customer* within your Private Label site. This special Owner Agent privilege eliminates the need to create an agent under each of your customers. As an Owner Agent, *YOU ARE AUTOMATICALLY AN AUTHORIZED AGENT UNDER EACH OF YOUR CUSTOMERS*! There is no need to have or use multiple agent logins to access your customers' activity.
- Owner Manager
  - This level can be assigned only to agents established under the Owner.
  - An agent with a Owner Manager level role will be able to access all areas of the Manage Account section of the site.
  - An Owner Manager will have full access to all customer and agent information. They may, however, be limited in what they can do within the Manage Pricing area. They may be restricted to view only the pricing information, or may be allowed to also modify various pricing information (System Level, Customer Level, and/or Quotes).
  - The primary Private Label Owner Manager is always established with full maintenance access to all pricing information.
  - Within the other areas of the Turbo site, Owner Managers will be able to access the counts and orders of *all agents under any customer* within your Private Label site. This special Owner Manager privilege eliminates the need to create an agent under each of your customers. As an Owner Manager, *YOU ARE AUTOMATICALLY AN AUTHORIZED AGENT UNDER EACH OF YOUR CUSTOMERS*! There is no need to have or use multiple agent logins to access your customers' activity.
  - Only Owner Managers have the authority to assign Supervisor and/or Manager Security User Roles to an agent. An Owner Manager may choose to set up their own company's agents as Supervisors to enable them to access each others' counts and orders. Owner Managers are able to assign this role to agents and customers to enable them to control the agents under that company and alleviate the need for personally managing the agents. An Owner Manager can do this through the Manage Agents area of the site.
  - An Owner Manager can remove any agent's ability to order. An option that is set only for Owner Managers controls the Owner Agent's ability to view pricing or invoices for counts and orders run under the Private Label Owner. This prevents the Owner Agent from seeing the Private Label's cost. Since the invoice is displayed as part of ordering a count, setting Allowed to view CAS Pricing to Owner to No will also prohibit the Owner Agent from ordering under the Owner's account.

3.3.2. Add an Agent

Agents may be created through the Manage Account section of your site, or they may be created through the Online Registration process, when a new customer account is created, if your site allows this.

To create a new agent, first select the customer under which the agent is to be assigned from the Customers drop-down list on the left of the screen. Select the company by clicking on the name. Click on the Add Agent line on the left navigation menu. A similar screen will be displayed, depending upon the customer selected and the security level of the agent logged on.



The Select the User Role option will be included on the display only for an Owner Manager. It will not appear for Supervisor agents.

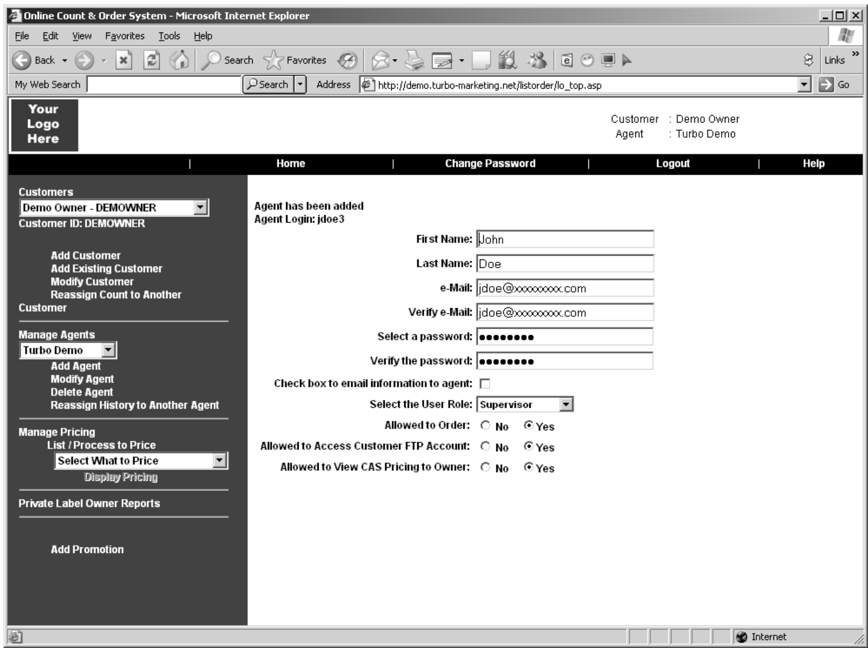
Supervisor agents may create only a regular agent, so any agent they create is automatically established with a user role of Agent.

The Manage Pricing Options For line may appear for an Owner Manager, but only when an agent is being created (or modified) under the Owner, and only if the Owner Manager has Maintenance authority for that Pricing option. If the customer selected is not the Owner, Manage Pricing Options will not appear on the Add Agent display because they will not be applicable for the agent being created.

Complete the information on the screen, scrolling down to access all of the agent information fields, if needed. At the bottom of the screen is the Add Agent button. You must click on this button or hit the Enter↵ key to actually complete the creation of the new agent. There is also a Password Rules button that you may click on to access details on the rules for creating a password.

If any of the required information is not supplied, a message box will appear to call attention to which information is still needed. The cursor will be positioned to the field in error:

Once all required information has been supplied and the agent created, the agent will be added to the list of agents available for management under that customer. The following (or similar) screen will confirm the add was successful and identify the agent login ID established:



The following information explains the agent fields available for maintenance and tells how they are used within the Turbo system.

First and Last Name — required

The agent's name will appear throughout the Turbo system following Agent: in the upper right corner of most screens . The agent's name will also appear in various agent drop-down boxes.

eMAIL Information — required

The agent's eMAIL address will be the default for any count or order where output is eMAILed. This address will also be used to communicate with this agent for changes to agent information, notification of changes to the Turbo system, notification if the agent forgets his/her password, *etc*. Use caution when entering the agent's eMAIL address to ensure proper communication with this agent. You will be required to enter this address twice, to verify accuracy. While Online Registration does not allow adding agents with duplicate eMAIL addresses, there is no such restriction here.

Password Information — required

The agent will use his/her password to log in to your Turbo site. You will be required to enter this password twice to verify accuracy. Use caution when entering the agent's password, because you will not be able to view this information after the agent is created (or modified).

The password is *not* case sensitive.

These password rules are enforced for security:

- Must be between 6 and 30 characters
- Must contain at least one alpha character and at least one numeric character
- Permissible special characters are $ # ! or period
- Cannot equal agent login
- Cannot contain 3 or more repeating characters or patterns (*e.g.*, ababab).

eMAIL Information to the Agent — optional

At the time an agent is created or modified, you have the option of sending the agent an eMAIL which will contain all of the agent information you have created. This is determined by the Check box to eMAIL Information to agent field. If this box is checked, the following eMAIL will be automatically generated to the agent's eMAIL address on record. Your Customer Service phone number and eMAIL address will be inserted within the message as well as a link to your Turbo site.

```
From: "TurboMktSupport Demo" <custservemail@yourcompany.com>
To: "John Doe" <jdoe@xxxxxx.com>
Subject: Turbo Marketing Net – Agent Information
Date: Thu, 20 Nov 2003 17:33:00 -0600

Agent Name:     John Doe

Agent ID:       jdoe1

Agent Password: lost2found

Agent EMAIL:    jdoe@xxxxxx.com

To Login, visit http://xxxxxxxx.turbo-marketing.net
________________________________________________________________________

If you have any questions, our friendly Customer Service team is available
by calling 1-800-111-1111 or eMAIL to custservemail@yourcompany.com

Thank you,
Turbo Marketing Net
http://xxxxxxxx.turbo-marketing.net
```

User Role — required when present

A Supervisor or Owner Manager will have this option available on the Add/Modify Agent display, but the Supervisor is limited to the choices of Agent or Supervisor.

The User Role assigned to an agent dictates what access that agent has to various sections of your Private Label site, and what functions that agent can perform within those areas.

The Select the User Role options that can be assigned to an agent include an *Owner Manager*, an *Owner Agen* role, a *Supervisor Agent*, and a *Regular Agent* . A drop-down box contains the available roles that may be assigned to the agent being created.

Please refer to the "3.3.1. Agent Security User Roles" subsection in this chapter for details on these user roles.

Manage Pricing Options — required when present

Manage Pricing Options controls what access an Owner Manager has within the Manage Pricing area of Manage Account. The pricing options are applicable only if the agent being created or modified is a Manager under the Owner. These pricing options cannot be assigned to customers' agents, nor to your own Supervisor agents.

Only an Owner Manager may have this option available on the Add/Modify Agent display, and only *if* that Owner Manager has Modify authority on at least one of the pricing options. Owner Managers can assign only authority that they themselves possess. Therefore, only the Manage Pricing Options to which an Owner Manager has Modify authority will appear on the Add/Modify Agent display. If the Owner Manager has only View authority for an option of Manage Pricing, that option will not appear for assignment and is assumed to be View access for the Owner Manager being created.

Manage Pricing Options consist of View, Modify, or Override/Modify the Owner's System Level Pricing, Customer Pricing, and the company's Customer Quotes. A drop-down box will be available for each pricing option that may be assigned to the Owner Manager being created.

Please refer to the "3.4. Manage Pricing" section in this chapter for details on these summarized pricing options: Quote, Customer, and System.

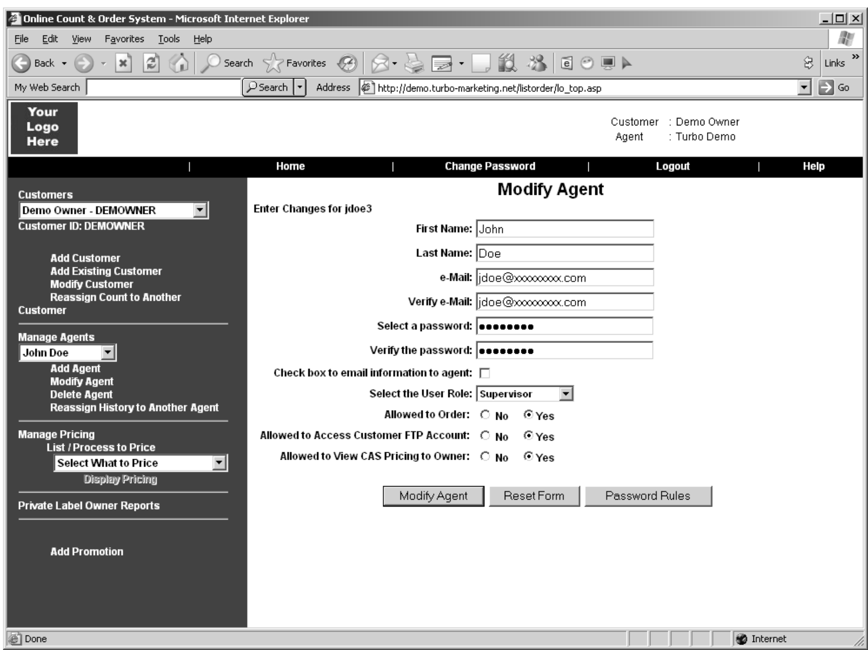
3.3.3. Modify an Agent

The Modify Agent function is available to Supervisor and Owner Managers. Supervisor agents will be restricted to agents under their company.

Whether your agents were created through Manage Account, or through the Online Registration process, all are available for you to maintain in the Manage Agents area, with two limitations:

- Modifying an agent record can occur only when that agent is not logged onto the Turbo site.
- Any agent that has been “Deleted” (marked as “Inactive” within the site) cannot be modified.

To modify or view an existing agent’s information, select the customer from the Customers drop-down list on the left of the screen. Select the company by clicking on the name. Then select the agent from the Agent drop-down list on the left of your screen by clicking on the name. Click on the Modify Agent line on the left navigation menu. A similar screen will be displayed, depending upon the customer selected and the security level of the agent logged on.



The agent’s login ID displays at the top of the Modify Agent screen when the agent is selected.

Enter or overtype the information on the screen. You may need to scroll down to access all of the agent information. At the bottom of the screen is the Modify Agent button. You must click on this button or hit the Enter↵ key to actually complete the update to the agent information. There is also a Password Rules button to click on to access details on the rules for modifying a password.

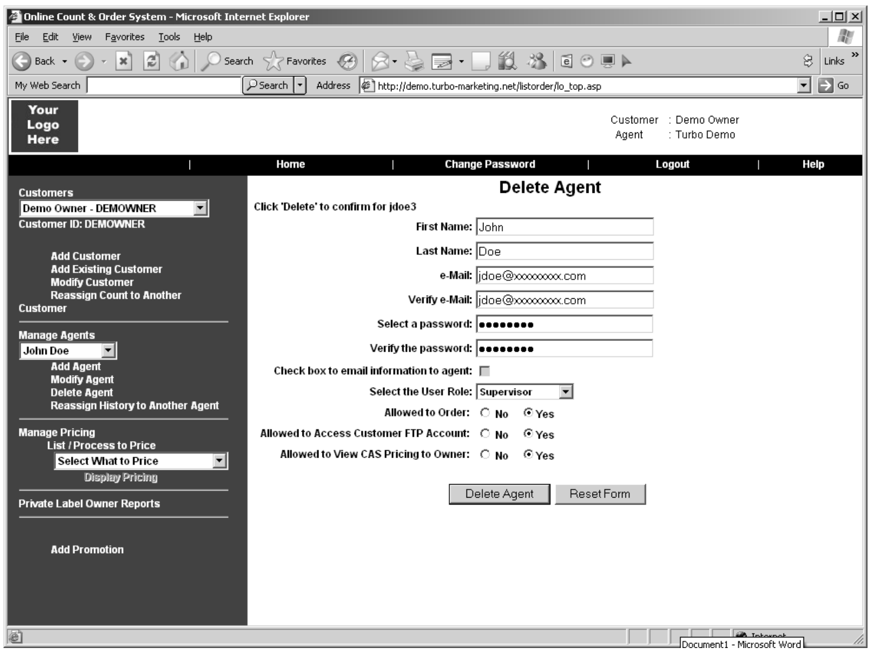
The same requirements for Add Agent apply to Modify Agent. Please refer to that subsection for details and restrictions on the individual fields available for maintenance.

3.3.4. Delete an Agent

The Delete Agent function is available to Supervisor and Owner Managers. Supervisor agents are restricted to agents under their company.

The Delete Agent function allows removal of a selected agent from active use of the Turbo system. An agent cannot be deleted while he/she is actively logged onto the site.

To delete (inactivate) an existing agent, select the customer from the Customers drop-down list on the left of the screen. Select the company by clicking on the name. Then select the agent from the Agent drop-down list by clicking on the name. Click on the Delete Agent line on the left navigation menu. A similar screen will be displayed, depending upon the customer selected and the security level of the agent logged on.



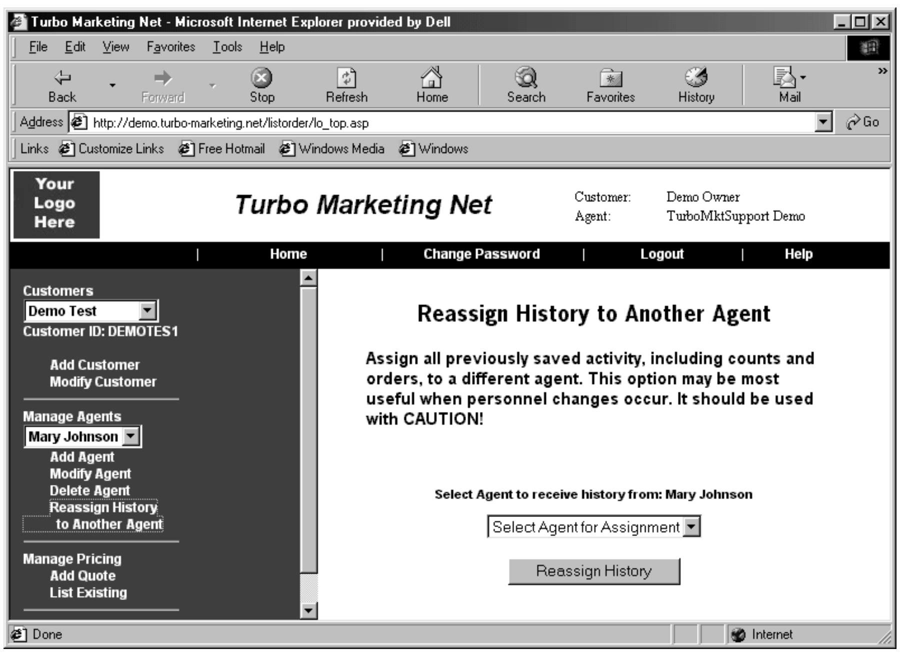
The agent's login ID will be displayed at the top of the Delete Agent screen to assist in verification, if needed. You may need to scroll down to access the Delete Agent button at the bottom of the screen. You must click on this button or hit the Enter↵ key for the action to be completed.

The Agent record is not physically deleted from the system. Instead, it is flagged as Inactive and will no longer be available for use. The agent will still appear in your list of agents for that customer; however, that agent's name will be gray. Attempting to select them for modification will display a message noting that they are inactive and cannot be modified.

3.3.5. Reassign Activity to Another Agent

Reassign History to Another Agent allows assignment of all previously saved activity, including counts and orders, from one agent to another agent within the same company. This option may be most useful when personnel changes occur. It should be used with great CAUTION, since this is a process which cannot be reversed. All history of counts and orders is transferred to the receiving agent. No reference to the prior agent remains to help selectively “undo” this change once it has been completed.

To reassign all available activity of an existing agent, select that agent’s customer from the Customers drop-down list on the left of the screen. Select the company by clicking on the name. Then select the agent from the Agent drop-down list by clicking on the name. Click on the Reassign History to Another Agent line on the left navigation menu. The following screen will appear:



The Reassign History screen contains a drop-down box, listing all available agents within that company that may receive the history. Select the agent that is to receive the history by clicking on the name. Click on the Reassign History button on the bottom of the screen or hit the Enter↵ key to complete the action.

The bottom of the screen will display All work history reassigned to xxxxxxxx (where xxxxxxxx is the name of the receiving agent) when the history has been successfully reassigned.

3.4. Manage Pricing

Within the Manage Pricing area of the Manage Account section of your Turbo site, you have complete control over what you charge each of your customers. The Owner Manager has the power to manage System Standard (Default/Retail) Pricing, as well as to set System Minimum Pricing. This ensures that lists are not being sold below pre-determined pricing levels. In addition, you can decide and control what to charge each customer, item by item, on an individual customer basis. You also have the ability, through the customer Quote function, to lower a customer's charges on a special "one-time" or extended basis for exceptional processing needs.

The Manage Pricing area is available only to Owner Managers.

Functions available within the Manage Pricing area will vary, depending upon what customer is selected (*i.e.*, the Owner or a customer of that Owner).

- The List / Process to Price drop-down box will always appear and present all the types of pricing available for the customer. It will include all lists available on your site, in alphabetical order by list name, followed by any processes available on your site.
- The Display Pricing function will always appear and present the List display showing a list of all the applicable pricing entries for the customer, based on the List/Process selected.
- The Add Quote function will be available only when the customer selected is *not* the Owner. Quotes may be established only under a customer — not under the Owner.

Separate pricing entries for *each List and Process* will be available under each List/Process found within the drop-down box. The pricing for one is completely independent of all other pricing. It is used exclusively for that specific list or process. This includes miscellaneous pricing (*e.g.*, outputs, shipping) found across most lists and processes.

The pricing set for one list does not carry over to the pricing for another list/process.

- The System Level and Customer pricing includes all the items necessary for the selected List/Process only.
- Quotes are also created under the *unique* List/Process entry and contain all the items necessary for this List/Process only.
- The List/Process description is displayed in the View/Modify/Email Pricing screen header.

3.4.1. Manage Pricing Authority

The actions available within the Manage Pricing area will vary depending upon what pricing authority the individual Owner Manager has been assigned through the Manage Pricing Options on the Add/Modify Agents screen. The authorized actions are available in the drop-down box to select on the List screen.

Note: Any Manager authorized for View will automatically have Email (Pricing Report) authority.

- Quote
  - An Owner Manager may have View, Modify, or Override/Modify authority on all Customer Quotes within the Manage Pricing area of Manage Account.
  - If the Owner Manager is authorized only for View, that person will be able to view existing Customer Quote Pricing, but will not be able to add a new quote or to modify an existing one.
  - If the Owner Manager has Modify authority, that person will be able to view and modify existing customer quotes as well as create new customer quotes.
  - If the Owner Manager is authorized for Override/Modify, he/she will be able to view and modify existing customer quotes as well as create new customer quotes. This type of Owner Manager will ***not** be restricted by the System Minimums* in place. Any price set by this person will be accepted, regardless of whether it falls below the System Minimum.
- Customer
  - An Owner Manager may have View, Modify, or Override/Modify authority on all Customer Level Pricing within the Manage Pricing area of Manage Account.
  - If the Owner Manager is authorized only for View, that person will be able to view existing Customer Level Pricing, but will not be able to establish or modify customer pricing.
  - If the Owner Manager has Modify authority, that person will be able to view and modify existing customer pricing as well as establish Customer Level Pricing.
  - If the Owner Manager is authorized for Override/Modify, he/she will be able to view and modify existing customer pricing as well as establish Customer Level Pricing. This type of Owner Manager will ***not** be restricted by the System Minimums* in place. Any price set by this Owner Manager will be accepted, regardless of whether it falls below the System Minimum.
- System
  - An Owner Manager may have View, Modify, or Override/Modify authority on the Owner's System Level Pricing within the Manage Pricing area of Manage Account. This includes the Owner's Cost Level Pricing, the System Standard Pricing, and the System Minimum Pricing.

- If the Owner Manager is authorized only for View, that person will be able to view existing Owner's System Level Pricing, but will not be able to modify any of these prices.
- If the Owner Manager has Modify authority, that Manager will be able to view and modify System Standard and System Minimum Pricing.
- If the Owner Manager is authorized for Override/Modify, he/she will be able to view and modify System Standard and System Minimum Pricing. This type of Owner Manager will ***not*** *be restricted by the System Minimums* in place. Any price set by this Owner Manager will be accepted, regardless of whether it falls below the System Minimum.
- The Modify and Override/Modify authority should be restricted only to the Private Label Owner Manager and the persons responsible for managing your company's System Level Pricing to ensure that lists are not being sold below your company's costs.
- The Owner Cost Level Pricing can never be modified by the Owner Manager.

3.4.2. Owner Costs and System Level Pricing

Owner Costs

When you registered as a Private Label Turbo Owner, an agreement was reached to determine your charges for orders processed through your Private Label site. Your costs are represented under the Owner Costs level pricing. There will be a separate Owner Level Costs pricing entry for *each* list and process that is available on your site.

What you will actually be charged as an Owner is available for review when you select the Owner as the customer for Manage Pricing. This is available to use as a guide when establishing your System Standard and System Minimum pricing.

System Standard Pricing

This is your site's "default/retail" pricing. When your Private Label site was established, System Standard Pricing was created for you. There will be a separate Standard List/Process Prices entry for *each* list and process on your site.

Modify your System Standard Pricing to reflect what you consider suggested retail pricing.

System Minimum Pricing

System Minimum Pricing guarantees that your minimum pricing standards are met. You're your Private Label site was established, System Minimum Pricing was created for you. There will be a separate Minimum List/Process Prices entry for *each* list and process on your site. They represent your site's "minimum" pricing for that specific list/process.

Modify your System Minimum Pricing to reflect what you consider to be the *lowest* pricing your company will allow for that service. The system will not allow entry of Customer Level Pricing or Quotes for less than the System Minimum prices that are in place at the time. The only exception to this rule is for authorized Owner Managers with Override/Modify authority.

3.4.3. Customer Level Pricing

Each customer of a Private Label Owner may have special pricing considerations. You, as an Owner Manager, have the flexibility to set specific pricing for any customer, for any or all lists and processes, on an item-by-item basis. These prices, once established, will be used in place of the System Standard prices for all counts and orders run by this customer for that specific list/process. Customers without Customer Level Pricing established for a given list/process will use the System Standard Pricing for that list/process.

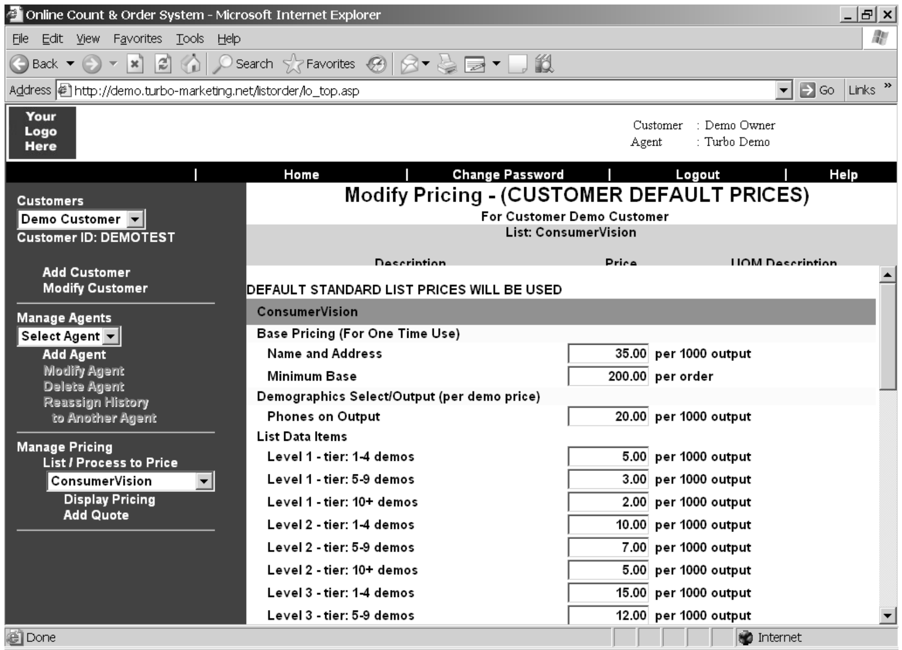
On occasion, even a customer with established pricing may have an order that calls for exceptional pricing. The Owner Manager may create a special price quote for that order. This special feature provides the flexibility to allow the customer to use this pricing one time, or for an extended, specified period of time, for a special circumstance. You decide what type of quote, and how long the quote is to be available for the customer's use. When the price quote is created, it will be assigned a unique Quote ID that you provide to the customer for selection when submitting a count. This will ensure the special pricing is applied to the order. It's that simple!

Quotes may be created even when Customer Level Pricing has not been established. You may choose to set up a quote for an extended period of time to see whether you get the promised volume on orders *before* you establish or modify Customer Level Pricing.

There will be a separate customer pricing entry for *each* list and process available on your site. This is your pricing to that customer for that specific list/process. Your System Standard prices for this list/process will be used for all counts and orders run by this customer against this list/process, until you establish Customer Level Pricing for that list/process. Quotes may also be created for this customer for this specific list/process.

Establishing Customer Specific Pricing

On the List display of Manage Pricing, you will see a description of Customer Default Prices (instead of Customer List/Process Prices) when a customer's pricing is defaulting to System Standard prices. When this entry is selected, the View/Modify Pricing screen will also include the message DEFAULT STANDARD LIST/PROCESS PRICES WILL BE USED directly above the first price entry line.



This message indicates that this customer will receive System Standard prices. Any changes to System Standard prices will automatically affect this customer, without the need to specifically update this customer.

If, however, you would like to lock in these prices, and/or set different prices for this customer, save these prices under the Modify Prices option for this customer. Once the Customer Level prices have been established for a customer, they are locked in and will not be affected by any changes made to the System Standard prices. You would have to specifically update this customer's pricing for any future price changes.

Once Customer Level Pricing is established, the DEFAULT STANDARD LIST/PROCESS PRICES WILL BE USED message no longer appears. When Customer Level Pricing is saved successfully, the display automatically changes from Modify to View. The customer description will still show Customer Default Prices at that time. Returning to the List display will refresh the customer's description to reflect the new status of Customer List/Process Prices.

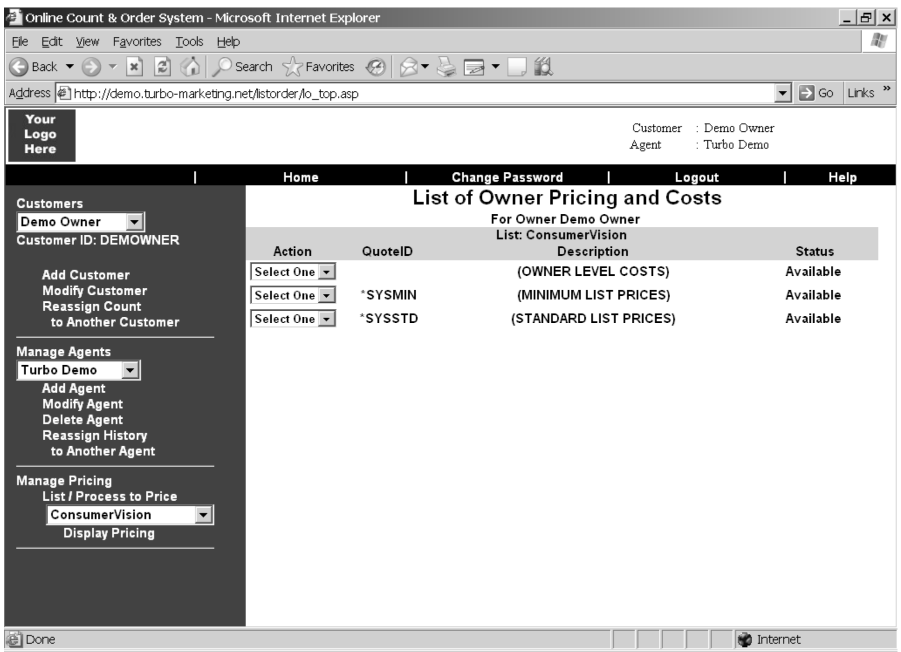
There will be a separate customer pricing entry for each list and process available on your Private Label site. You may establish Customer Level Pricing for any or all of the pricing entries listed, as you see fit.

3.4.4. Display Pricing

To see the pricing available for a specific customer, select the customer from the Customers drop-down list on the left of the screen. Select the customer by clicking on the company name. Then select the specific List/Process of interest from the List / Process to Price drop-down box under Manage Pricing on the left navigation menu. All Lists available on your Private Label site will be displayed within the drop-down box, in alphabetical order by list name. In addition, any Processes available on your site will follow the lists in the drop-down box. Select the List or Process by clicking on the name. Then click on Display Pricing under Manage Pricing on the left navigation menu.

The List screen will always display all applicable pricing, based on the customer and List/Process selected. It is from this List display that you select a specific pricing entry for viewing, for modification, or for an eMAIL report of pricing.

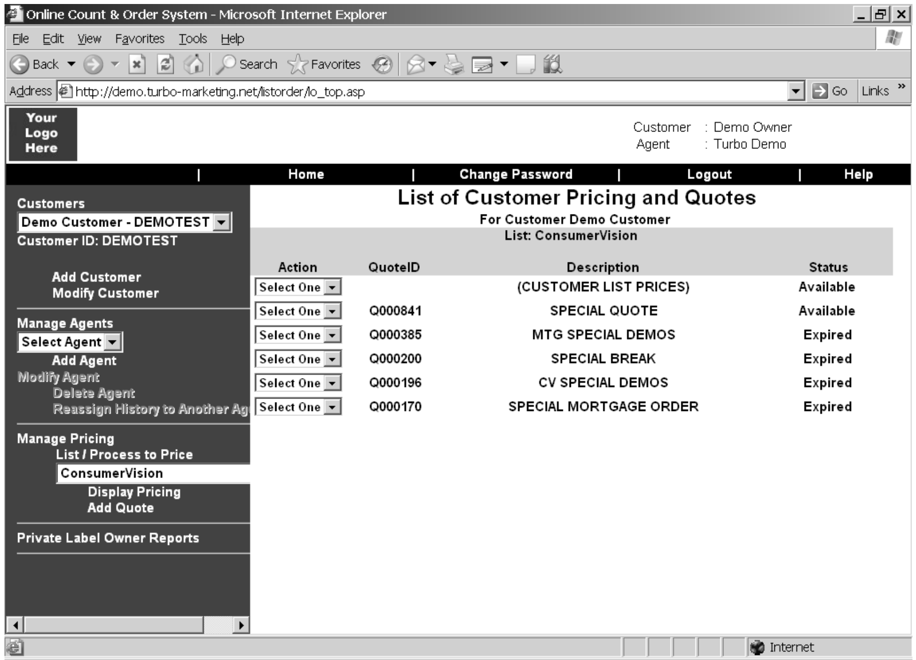
If the Owner was selected as the customer, the Owner Costs and System Level Pricing will be listed:



When the Owner is selected as the customer, you will always have the three system level entries for the selected List or Process displayed: Owner Level Costs, Minimum List/Process Prices, and Standard List/Process Prices. These entries represent pricing for the specific List or Process selected only.

A separate set of the three system level entries are available under *each* unique List or Process. This pricing is completely independent of all other pricing, and is used exclusively for that specific List or Process.

If one of your customers was selected, the Customer Pricing and any quotes established for that customer and List/Process selected will be listed:



When a customer is selected, you will always have at least the Customer Pricing entry listed. The description Customer List/Process Prices displays when customer prices have been established and saved for this customer. If the description Customer Default Prices displays, this customer will receive your company's System Standard Pricing. In addition, any quotes that have previously been created for this customer will be listed, with the most recent quotes displayed at the top of the screen. There is a maximum of 150 quotes that can be displayed.

The following information explains the fields displayed and how they are used within the Turbo system.

Action — required

The Action drop-down box will vary depending upon the pricing authority the Owner Manager has, and the entry selected. There are three possible actions available for the List entry:

- *View* – The View action will always be available to select from the drop-down box. Selecting this action for an entry listed will result in the View Pricing screen being displayed. All pricing information on that screen is protected from modification.
- *Modify* – The Modify action will be available only for an Owner Manager that is authorized to perform pricing maintenance on that customer/quote level. (See “Manage Pricing Options” under the “3.3.2. Add an Agent” subsection of this manual for additional details on pricing authority.) The Modify action will not be available on the Owner Level Costs entry, nor for any quote that is closed or expired. In addition, any “Multiple Use” type quote that has been used one time will no longer be available for the Modify action.

  Selecting the action of Modify for an entry listed will display the Modify Pricing screen. All pricing information on that screen is available for you to modify.
- *Email* – The Email action will always be available to select from the drop-down box. Selecting this action for an entry listed will result in the Email Pricing screen being displayed.

Quote ID — display only

The quote ID on the List display identifies special pricing established for that customer.

In the case of the Owner, the System Minimum Level will show a quote ID of *SYSMIN. This represents System Minimum Pricing. *SYSSTD represents System Standard Pricing.

For a customer, any entry with a quote ID identifies special pricing. This quote ID is the unique identification of this special pricing that the customer must select when running a count to receive this pricing. The system automatically assigns this unique quote ID when a customer quote is created.

Description — display only

This describes the pricing entry. The system provides the description for owner and customer pricing. The description for a customer quote is entered when it is created.

Status — display only

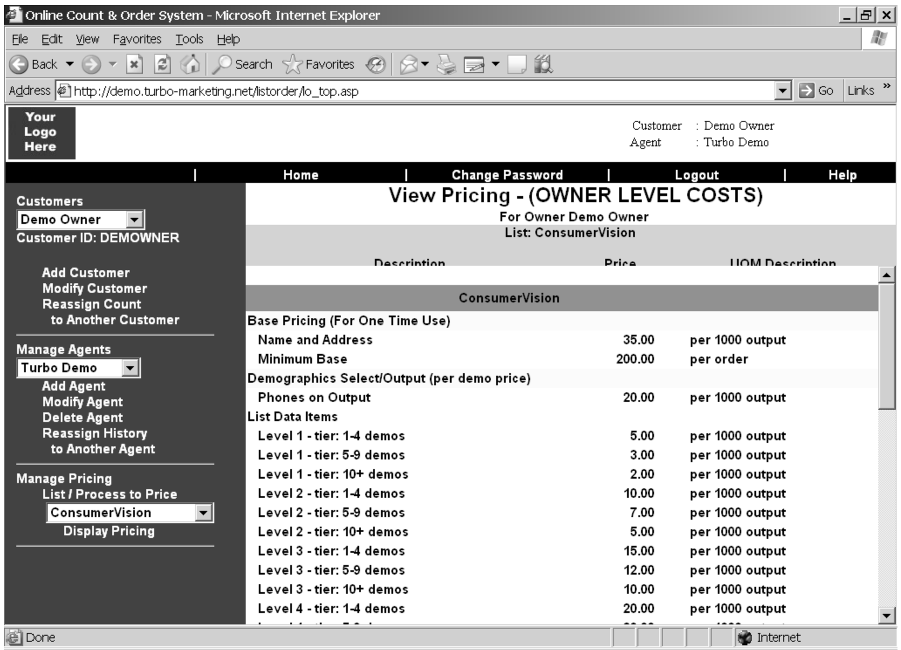
The Status will vary depending upon the entry. There are three possible status values available for the list entry:

- *Available* – All owner/system level entries, and all customer level entries will always be set to a status of Available. Any customer quote that has not yet expired, or has not yet been closed due to use will be set to Available status. Entries with an Available status can be selected when submitting counts.
- *Closed* – The status of Closed is reserved for customer quotes. When a quote is no longer available for use, the system will automatically set the status to Closed. (See “Usage Type” under the “3.4.6. Add a Customer Quote” subsection of this manual for details.)
- *Expired* – The status of Expired is also reserved for customer quotes. When a quote has passed its expiration date and has *never* been used, the system will automatically set the status to Expired. This quote is no longer available for use within the Turbo site for counts and/or orders.

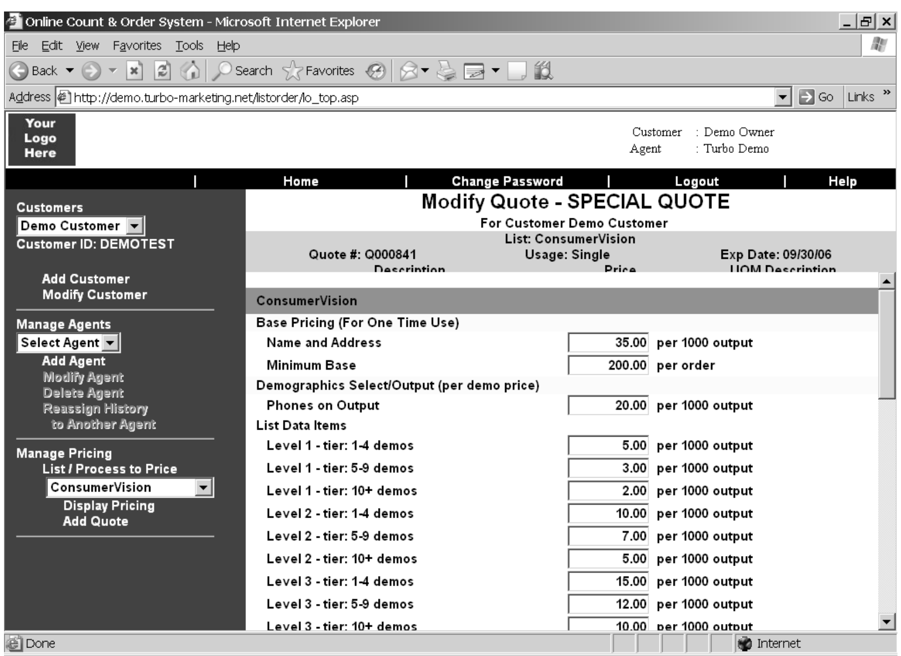
3.4.5. View/Modify Pricing

The View/Modify Pricing displays are available only to Owner Managers with the proper pricing authority. The action selected from the List display will determine whether the Owner Manager is presented with the View or the Modify display. The same basic display is used for owner, system, customer, and/or quote level pricing. There is some additional Quote Control information at the top of the display when a customer quote is selected.

Example of a View Owner Level Costs screen (top of screen):



Example of a Modify Customer Quote screen (top of screen):



When the Modify action is selected for an entry on the List display, the Modify Pricing screen will appear. All pricing fields will be presented with the values currently in use for this entry. Enter the necessary changes. Scroll down to access all the pricing information available. At the bottom of the screen is the Save Prices button. Click on this button to actually apply any changes made to prices. To “cancel” the modifications *before* clicking on the Save Prices button, click on any function available on the left navigation menu or black navigation bar.

The Owner Manager has the flexibility to change the prices, but can never enter prices below the System Minimum prices that are already in place, unless they are authorized for Override/Modify pricing. Refer to the “Manage Pricing Authority” information earlier in this subsection for details on the pricing security settings. The *only other* exception to this rule is the modification of the System Minimum Prices entry itself, which has no restrictions.

When an entry is successfully modified and the Save Prices button has been clicked on, the following pop-up window will appear:

If the Save Prices button is clicked on and no changes were made, the following pop-up will appear:

After an update successfully occurs, the system automatically goes to the View mode for the record that was just updated. If you want to look at another customer's pricing, change the customer selected from the Customers drop-down box, select the List/Process of interest from the drop-down box, and click on Display Pricing to view that customer’s current pricing entries.

Informational Messages

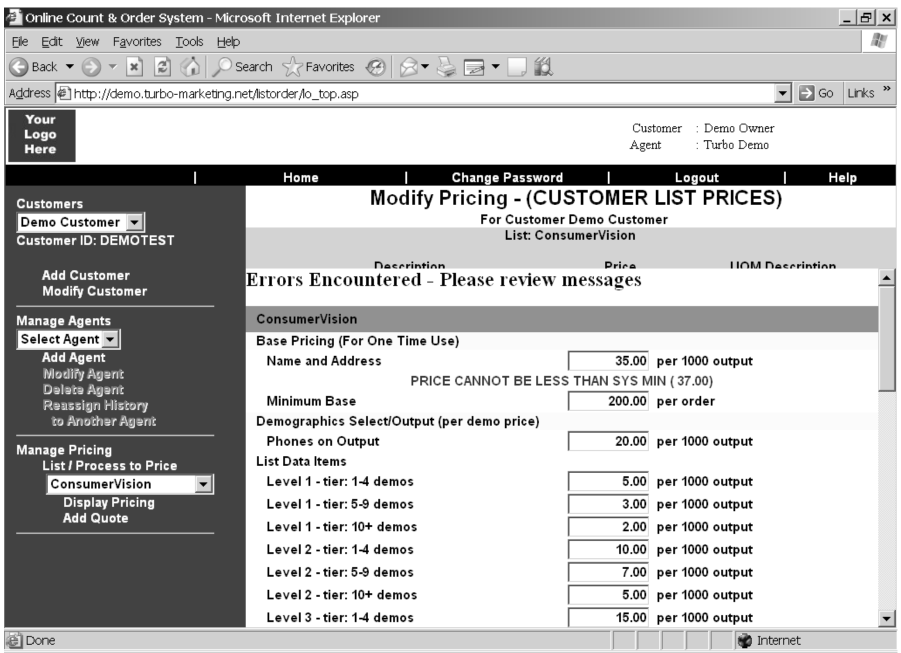
On both the View and Modify Pricing displays, if the current price falls below the System Minimum price an *informational message* will appear directly under the price field at issue. example: NOTE: PRICE LESS THAN SYS MIN (150.00) This is to alert the user to the fact that the price is below the current System Minimum.

If the Owner Manager is authorized for Override/Modify pricing, he/she will be able to modify any prices on this entry, regardless of what the System Minimum is set to. Anyone *not* authorized with the Override/Modify setting who attempts to modify this entry will receive an error message on those prices until the prices have been adjusted to match or exceed the System Minimum.

Error Handling

There are two possible error handling methods, depending upon the type of pricing error encountered. Most errors will be identified by a pop-up window describing the actual error, followed by the cursor positioned to the price in error. This type of error may need to be corrected before you can exit from the form. Example:

Other errors that are the result of changes outside the established prices may appear with a generic error message directly above the first pricing line at the top of the screen, followed by the specific error message located directly under the field(s) in error. This type of error is most common when the System Minimum prices have been raised, but the customer pricing has not been adjusted to reflect those increases. Example:



If a system problem or inconsistency is encountered, the entire data area of the View/Modify screen will be blank, and a message System Problem Encountered will be displayed, followed by a more specific technical error message (example: C-REC: CUSTOMERID INVALID). If you receive this type of error, notify the Turbo Support Manager, and provide all the information displayed on the screen.

The following information explains the pricing fields available for maintenance (or view):

QUOTE CONTROL INFORMATION — DISPLAY ONLY

When the entry selected is a customer quote, additional information is presented at the top of the form that identifies unique information specific to that quote. This information will be presented only on Quotes and may not be modified.

Please refer to the “3.4.6. Add a Customer Quote“ subsection of this manual for details on those fields.

PRICING INFORMATION

Description — display only

The Description column of the View/Modify Pricing form lists each pricing field’s description and categorizes the pricing fields by type, breaking them apart with a category sub-title, as applicable. These descriptions may not be modified.

The pricing categories typically consist of the following:

- *Base Pricing* – Consists of the base name and address and minimum pricing.
- *Demographics* – The select/output per demographic prices. When there are multiple tiers present, details on what level a particular demographic falls into can be found in the Turbo Help / Detailed Help, Count Demographics area of the system.
- *Processing Options* – May include Keycoding, Nth Select, save orders for suppression, *etc.*
- *Output Options* – Includes electronic, print, and other media formats.
- *Other* – Consists of shipping and handling, programming, and cancellation charges.

Price — requirements based on System Minimum prices

The Price column identifies the current price for this field, presented in the applicable unit of measure. You may enter or overtype the desired pricing. It must be defined in the proper unit of measure (each, per thousand, *etc*.).

If the System Minimum Pricing entry’s price for that equivalent field contains a value at the time of this modification, this price field will be required, and must not fall below the System Minimum’s value. This restriction will *not* apply if the Owner Manager is authorized for Override/Modify pricing.

All price fields must pass the validation *before* *any* modifications are accepted.

UOM Description

The UOM Description column of the form identifies the unit of measure for that particular price field: quoted, stored, and charged. These UOM descriptions may not be modified.

Valid Units Of Measure are as follows:

- *Per 1000 Input* – Price for every thousand records input. Value cannot exceed $999.99.
- *Per 1000 Matched* – Price for every thousand records matched. Value cannot exceed $999.99.
- *Per 1000 Output* – Price for every thousand records output. Value cannot exceed $999.99.
- *Per Order* – Flat price for each order. Value cannot be less than $1.00 and cannot exceed $9999.99.
- *Each* – Flat price for each item. Value cannot be less than $1.00 and cannot exceed $9999.99.
- *%* – Percentage represented in whole percents – *e*.g., 15% would be entered as 15.00. Value cannot exceed 100%.
- *Per Hour* – Price for every hour. Value cannot be less than $1.00 and cannot exceed $9999.99.
- *X One-Time Price* – Price ratio/multiplier used against one-time pricing – *e.g.*, one and a half times the one-time pricing would be entered as 1.50. Value cannot be less than 1.00 and cannot exceed 999.99.

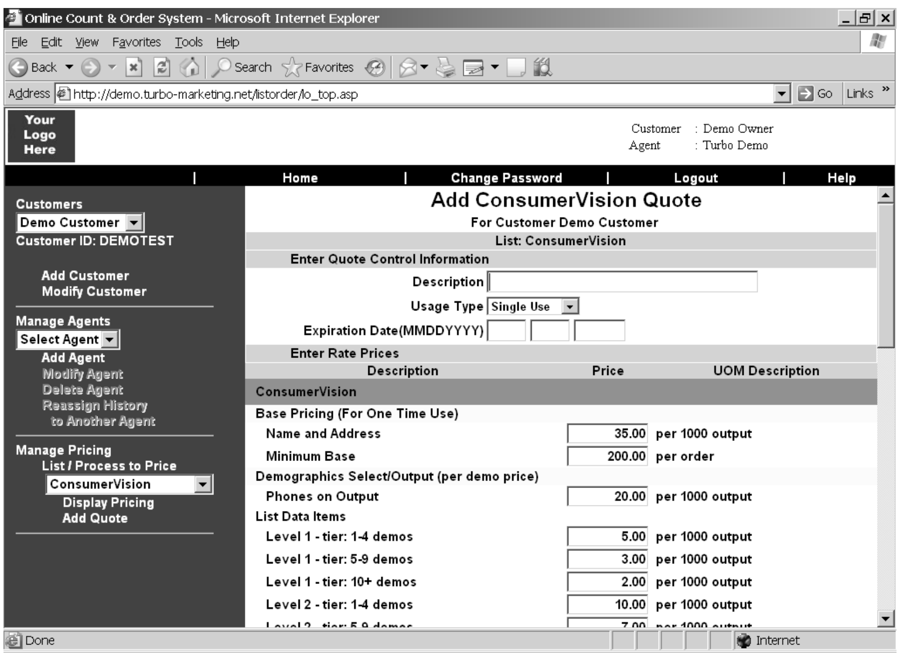
3.4.6. Add a Customer Quote

To create a new price quote for a customer, select the customer from the Customers drop-down list on the left of the screen. Select the customer by clicking on the company name. Then select the type of quote from the Manage Pricing List / Process to Price drop-down list on the left of the screen. Once a specific type of quote has been selected, the Add Quote line will be available to select. Click on this Add Quote line on the left navigation menu.

Note: **The Add Quote function will appear only when the customer selected is *not* the Owner.**

The Manage Pricing List / Process to Price drop-down box always includes all lists and processes available on this site, for selection.

The Add Quote screen is similar to the Modify Pricing screen, with the exception of the Quote Control Information located at the top of the screen:



The initial Add Quote screen displays default prices, based upon the customer's pricing. A customer quote will always start with whatever the customer's *current pricing* is when the quote is created. If the customer receives Customer Level Pricing, quotes for this customer are initialized to Customer Level prices. If the customer receives System Standard prices, quotes for this customer are initialized to System Standard prices. Any changes to System Standard prices or to Customer Level prices after a quote is created will have no effect on the quote's established prices. Those prices are locked-in and must be individually adjusted.

The Quote Control Information is unique to each quote and dictates the specifics of the quote being created.

All the additional pricing fields are identical to the Modify Pricing form. Enter the Quote Control Information, and enter or overtype the necessary changes to the prices. Scroll down to access all the pricing information available. At the bottom of the screen is the Save Quote button. You must click on this button or hit the Enter ↵ key to actually create the quote. To cancel the add *before* clicking on the Save Quote button, click on any function available on the left navigation menu or the black navigation bar.

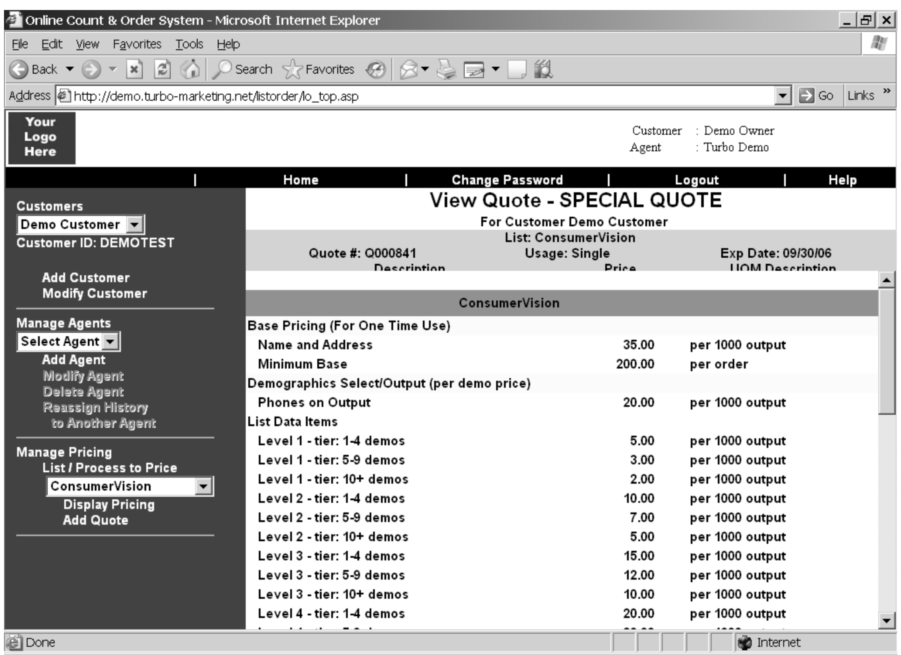
When creating a quote, the prices entered can never fall below the System Minimum prices that are already in place *unless* the Owner Manager is authorized for Override/Modify pricing.

Error messages will be handled in the same fashion as for the "Modify Prices" function, with a message box identifying the error, and the cursor being positioned to the field in error.

When a quote is successfully entered, and the Save Quote button clicked on or the Enter ↵ key hit, the following pop-up window will appear:

This is the unique Quote Number that you will need to provide to your customer for selection when submitting a count.

Once you click on OK, you will go into the View Pricing mode for the quote just created:



The following information explains the fields available for adding a quote:

QUOTE CONTROL INFORMATION

Description — required

The quote description will appear on the List display as well as on the top of the View/Modify Pricing forms when a quote entry is selected. It should be descriptive.

Usage Type — required

The Usage Type determines whether this quote may be used by the customer for more that one order.

- *Single Use* – The quote may be used only one time for a single order. After it has been used (supplied on the Submit Order form), the system will automatically close this quote to prevent any further use of these special prices.
- *Multiple Use* – The quote may be used an unlimited number of times for an unlimited number of orders until the quote expires. The system will automatically close this quote to prevent any further use of these special prices after the expiration date has passed. A Multiple Use quote will be available for modification until it has been used *once*. After that, the quote's prices are locked and may not be altered, even if it is not expired.

Expiration Date — required

The intent of the expiration date is to set up a quote for a specific number of days. After the expiration date has passed, the system will automatically close or expire the quote so that it is no longer usable. This will occur whether or not the quote was used. A new quote will have to be created if the customer did not place the order the quote was intended for.

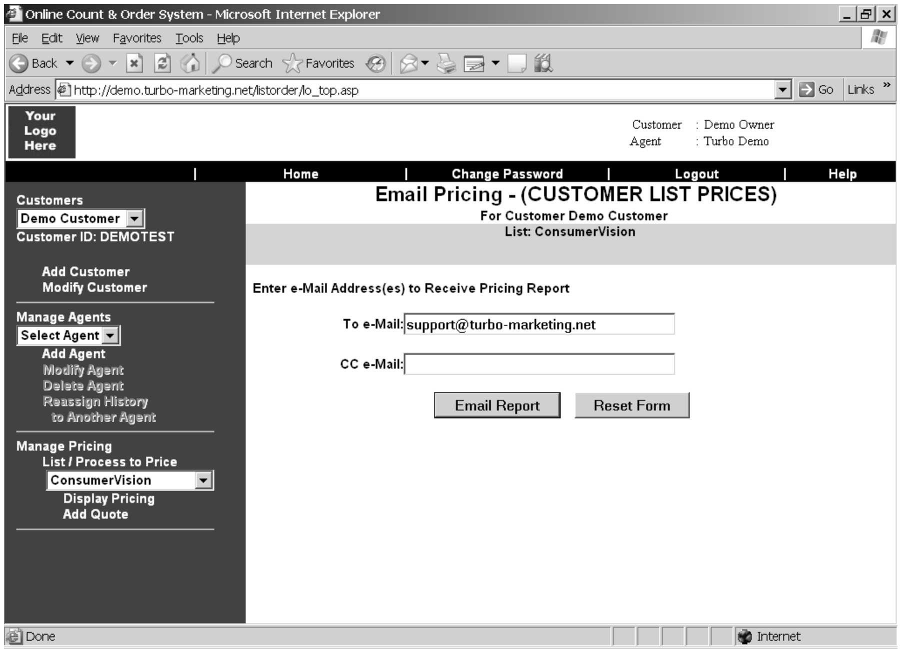
The expiration date cannot exceed 90 days from the creation date. It must be entered in MM/DD/CCYY format. The year must include the century.

PRICING INFORMATION

The rules for the individual pricing fields are the same for a customer quote as they are for the Modify Pricing function. Please refer to the "3.4.5. View/Modify Pricing" subsection of this manual for details on those fields.

3.4.7. Email Pricing Report

To email a Pricing Report to yourself, or to a customer, select the Email action from the List display, for the pricing entry you wish to email. The Email Pricing screen will appear.



The To e-Mail address defaults to the Owner Manager. Overtype a different To e-Mail address, if desired, and optionally enter the CC e-Mail address. Then click on the Email Report button. To cancel the Email *before* clicking on the Email Report button, click on any function available on the left navigation menu or the black navigation bar.

When the email address(es) is successfully entered, and the Email Report button clicked on or the Enter ↵ key hit, the following pop-up window will appear:

Once you click on OK, you will be returned to the Email Pricing screen.

The following is an example of the Email generated.

```
From: tdemo@demowner.com
To: jdoe@xxxxxx.com
Subject: PRICING: DEMOTEST CONSUMERVISION PRICES
Date: Mon 14 Aug 2006 16:00:50 -0500

SEE ATTACHED FOR TURBO MARKETING NET – PRICING REPORT

CUSTOMER: Demo Customer
LIST: CONSUMERVISION
```

```
(PDF) PQRP0030.16139.PDF
```

The pricing report is sent as a PDF attachment.

The format of the report is similar to the Pricing screens. The title of the pricing report will identify the type of pricing (customer level, owner level, quotes, *etc*.).

The signoff for the report will always identify the owner that controls this particular pricing entry. For example, the System Minimum prices will always signoff with the Private Label Owners name, since they maintain their own minimum prices. Customer pricing will always identify the Private Label Owner.

Example:

```
THANK YOU FOR YOUR BUSINESS,
DEMO OWNER
```

The following is an example of the end of a Pricing Report generated:

```
EFFECTIVE 08/14/2006 16:00            TURBO MARKETING NET - CUSTOMER LEVEL PRICES
FOR CUSTOMER: Demo Customer
    LIST:     CONSUMERVISION

MISC PRICING
   List Options (For Special Use)
         (One Year) Unlimited Use Multiplier ..............   2.50  X One-Time price
   Processing Options
         Zip File Input (Lists) ..........................     .00  per order
         Nth Select (Lists) ..............................     .00  per order
         Keycoding (Lists) ...............................     .00  per order
         Save Order For Suppression (Lists) ..............   10.00  per order
   Output Options
         Electronic Transmission (FTP, Email) .............    .10  per 1000 output
         Electronic Minimum ...............................  25.00  per order
         Print: Manuscript ................................   5.00  per 1000 output
         Print: Cheshire Labels ...........................   1.75  per 1000 output
         Print: Pressure Sensitive Labels .................   7.00  per 1000 output
         Print: 3X5, 4X6 Cards ............................  25.00  per 1000 output
         Print Output Minimum .............................  50.00  per order
         Tape/Cartridge/Diskette ..........................  25.00  each
         CD Rom or Zip Disk ...............................  50.00  each
   Other
         Shipping/Handling (Fedex, UPS) ...................  25.00  per order
         3rd Party Shipping ...............................   5.00  per order
         Programming Setup ................................ 100.00  per hour
         Cancel Run Charge ................................   1.00  per 1000 output
         Cancel Run Charge Minimum ........................  25.00  per order

THANK YOU FOR YOUR BUSINESS,

DEMO OWNER
```

4. Common Questions, Errors, Requests

4.1. *General Questions*
4.2. *Sign-On Problems*
4.3. *Registration Problems*
4.4. *Turbo System Errors – Page Cannot Be Displayed*

Full documentation of all features of Turbo can be found in online Help. To access online Help, select Help from the black bar menu selections. Once inside Help you will find Do Not Call File Information, Frequently Asked Questions (FAQs), Turbo-Marketing.net Tips, and Detailed Help. Also available is contact information for Customer Service, Sales, and Accounting.

4.1. General Questions

What information do I need to have available when I call in for support?

Resolving Problems – Information is the Key. To expedite problem resolution, please try to have all of the following information available.

- Your Turbo website/URL.
- The name and/or agent login ID of the person signed on that was experiencing the problem.
- The customer and agent ID that was in effect at the time of the problem.
- A clear explanation of the problem and any error messages received.
- Screen prints of the error messages, if possible.

How do I get support for my Private Label Turbo-Marketing.net site?

If you experience any problems or have questions relating to your site, call 1-888-420-7171 or eMAIL us at support@turbo-marketing.net. Customer Support hours are Monday through Friday between the hours of 7:00 a.m. and 5:00 p.m. Central time.

What eMAIL address are agent registrations sent to?

Turbo will use the eMAIL address you provided as your Sales eMAIL for your site's contact information.

Can we add our House File or managed files to the Private Label Site?

You will be able to bring your House or managed files up on your Private Label site. Your sales representative can work with you through this process.

Who is my contact for setting up my VeriSign registration?

The Turbo Support Manager will be involved with you and VeriSign through the initial set-up process. During the initial set-up, you will be provided the name and contact information of your VeriSign Account Manager.

Is it a requirement to use VeriSign?

No, you do not have to use VeriSign to use the Turbo system if you do not require acceptance of credit card orders.

VeriSign is required if you require acceptance of credit cards for order payment by your customers. Currently, VeriSign is the *only* credit card transaction service in place on Turbo-Marketing.net.

Who supports my customers?

One of the most significant benefits of having your own Private Label site is that *YOU* have control in your hands. If your customers have questions, they can address them directly to you. They do not have to deal with a third party. If you, the Owner, and your customer cannot resolve an issue, the Turbo Support Manager is available during business hours to lend support by calling 1-888-420-7171 (7a.m. – 5 p.m. Central time, Monday through Friday). The Owner should always have a representative on the conference call to ensure the customer's problem is being resolved satisfactorily.

What time of day is the system available?

System backups are done between 3 a.m. and 5 a.m. Central time. The system may not be available during that time.

How will I be notified of changes?

There are several ways that Turbo members will be notified of changes.

- *Screen Pop-Ups* – From time to time, changes are required that will affect all users of Turbo-Marketing.net. These changes may be a combination of legislative/privacy issues, existing data changes, or system changes that will dramatically impact the user's immediate use of the system. When entering the appropriate areas within Turbo, screen pop-ups will appear for your immediate notification.
- *Help Screens* – With Turbo a web-based system, it is easy to provide documentation updates. The online Help screens change frequently to include up-to-date information relating to the system.
- *eMAIL Broadcasts* – Periodically, a new version of Turbo will be installed. This installation will provide enhancements, make maintenance changes, and allow new data elements or entirely new files to be added to the system. When significant changes occur, information about them will be eMAILed to all registered agents.
- *Website Updates* – The Turbo website is continuously updated with information about the system. It includes Frequently Asked Questions, Turbo Tips, Updates, Release Dates, and more.

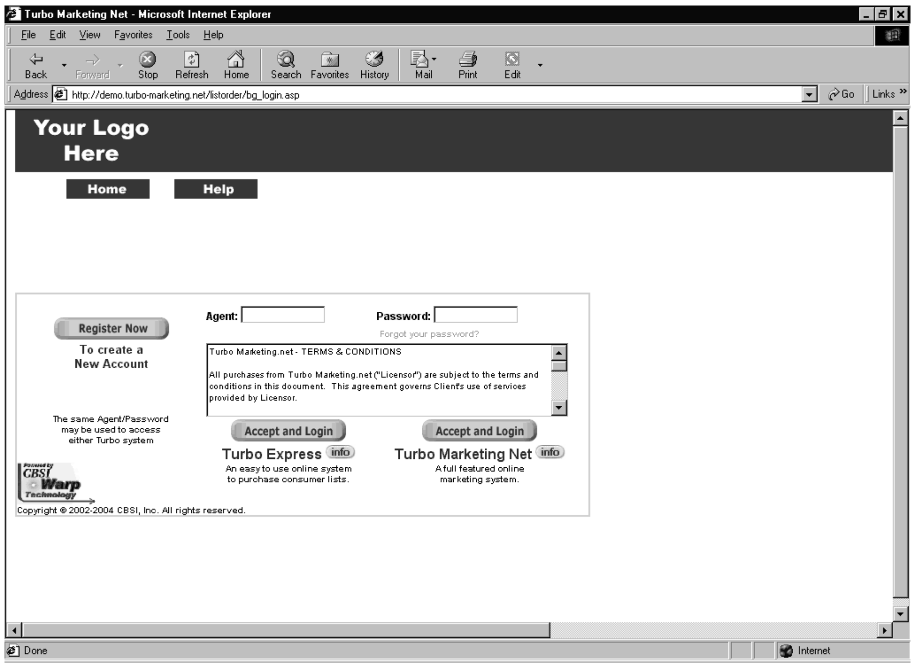
How can my customer be removed from eMAIL Broadcasts?

Once an Owner, Customer, or Agent is registered on Turbo, they become eligible to receive eMAIL broadcasts of new features, benefits, privacy updates, and more. An Owner must receive the messages to remain aware of changes to their site. If one of your customers wishes to be removed from future communications, contact the Turbo Support Manager at 1–888–420–7171 or eMAIL `support@turbo-marketing.net` to have that eMAIL address removed from future communications.

4.2. Sign-on Problems

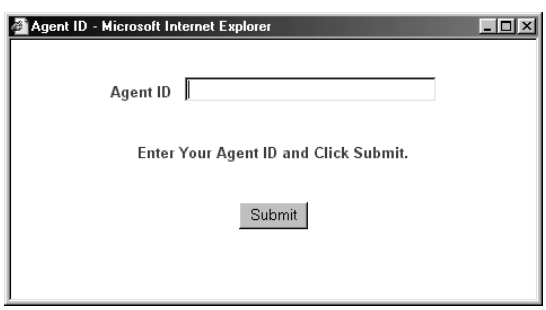
TROUBLE SIGNING ON

An eMAIL confirmation message will be sent to you after you complete registration on the site. This confirmation should be printed out and stored for future use. If this information is misplaced, you can contact your assigned Turbo Support Manager to receive your Agent name again. Because of privacy concerns, there is a separate step required to receive your password.



FORGOT PASSWORD

If you forget your password, the system can re-send it to you. To receive your password , enter your Agent ID. Your password will be eMAILed to you.



Below is an example of the message received when you are requesting your password.

x

ALREADY SIGNED ON

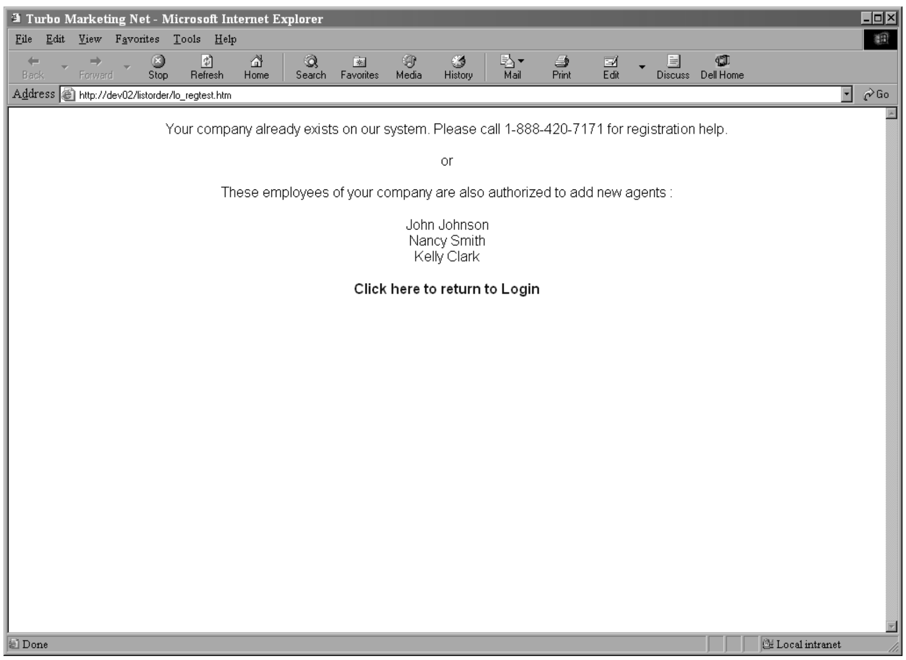
There will be times when a user may have signed into the Turbo site and has forgotten to log out. Returning to the site, they attempt to open a new Turbo session and receive an error message stating that Our system indicates Agent “XYZ” is currently logged in. Multiple sessions using the same login will cause unpredictable results.

The user can then close the error message window and go to the active session to continue working. The user could also click on the reset button which closes all previous sessions and allows login again.

4.3. Registration Problems

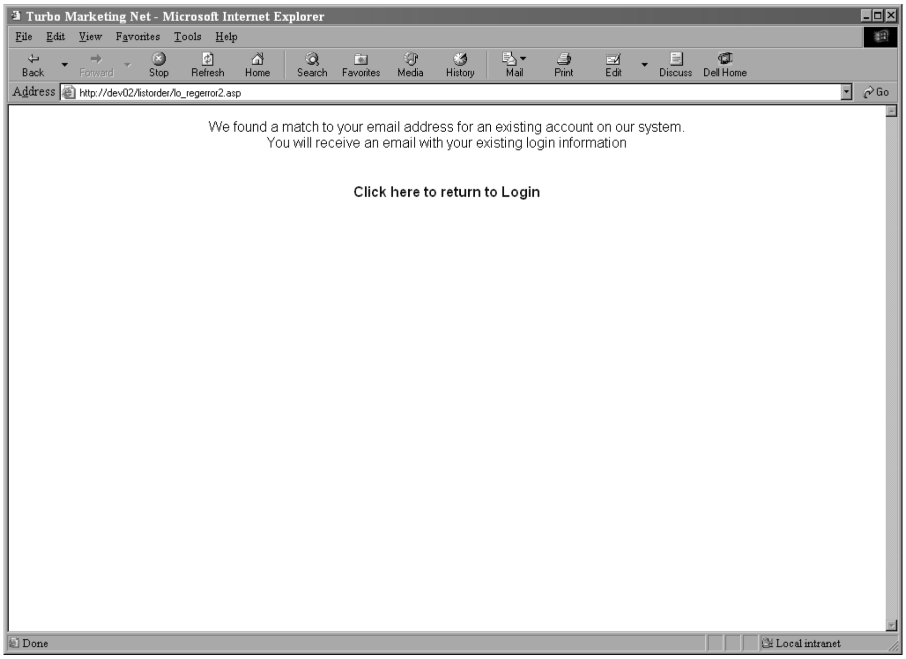
DUPLICATE CUSTOMER

There may be times when an agent is registering for a customer name and ZIP code combination that is already on file. When this is the case, an eMAIL will be sent to the Owner's Customer Service department (based on the site's Customer Service Contact Information) notifying them of this condition, with all of the account information the customer filled in on the Online Registration screen. In addition, the customer will receive the following screen to notify them of the condition. The customer may be added via Manage Account, based on the registration information eMAILed to Customer Service, if it is determined not to be a duplicate customer, and/or if the need to create a separate customer account is determined. Otherwise, a new agent should be created under the existing customer account for this individual through Manage Account.



DUPLICATE AGENT/EMAIL ADDRESS

When Agents forget the entry for the Agent field on the login screen, they may attempt to register a second time, which would create a duplicate account. If the system finds a match to an eMAIL address for an existing account, an eMAIL message is sent with the current Agent and password to that agent's eMAIL address, and the following screen is displayed to the agent. If it is determined that the Agent in fact needs a separate login for a separate customer account, or even for the same customer account, the new agent can be added with a duplicate eMAIL address via Manage Account.



4.4. Turbo System Errors

THE PAGE CANNOT BE DISPLAYED

This message at the top of the screen indicates there is a problem with the page you are trying to reach and it cannot be displayed. The screen will look somewhat like the contents of the box below.

Copy and paste the *entire* error screen into an eMAIL and send it to the Turbo Support Manager. If that is not possible, print the *entire* error screen and fax it to the Turbo Support Manager. There may not be a scroll bar when this system error occurs, so the user may need to highlight with the cursor to get the screen to move down to include all the error information and then copy the highlighted area to the eMAIL or to print.

```
The page cannot be displayed

There is a problem with the page you are trying to reach and it cannot be
displayed.

Please try the following:
   * Click the <http://www.turbo-
marketing.net/listorder/javascript:location.reload()>Refresh button, or try
again later.
   * Open the <http://www.turbo-marketing.net>www.turbo-marketing.net home
page, and then look for links to the information you want.


HTTP 500.100 - Internal Server Error - ASP error
Internet Information Services


Technical Information (for support personnel)
   * Error Type:
   * Microsoft OLE DB Provider for ODBC Drivers (0x80004005)
   * [Viaserv][ODBC Driver]DG23153: TCP/IP Socket - read failed.
   * /listorder/include/GetJobNumber.asp, line 51
   * Browser Type:
   * Mozilla/4.0 (compatible; MSIE 5.5; Windows 95)
   * Page:
   * POST 19 bytes to /listorder/lo_ordersubmit.asp
   * POST Data:
   * submit=Submit+Order
   * Time:
   * Thursday, November 06, 2003, 9:44:09 AM
   * More information:
   *
<http://www.microsoft.com/ContentRedirect.asp?prd=iis&sbp=&pver=5.0&ID=500;1
00&cat=Microsoft+OLE+DB+Provider+for+ODBC+Drivers&os=&over=&hrd=&Opt1=&Opt2=
%2D2147467259&Opt3=%5BViaserv%5D%5BODBC+Driver%5DDG23153%3A+TCP%2FIP+Socket+
%2D+read+failed%2E>Microsoft Support
```

TERMS AND DEFINITIONS

Address Correction Requested
When printed below the return address of a mail piece, the USPS is authorized to provide the new address, if known, of an addressee no longer at the address on that mail piece.

Address Standardization
Creating a universal format for coding addresses. This optimizes the processing capability of automated equipment to enhance deliverability and provides the potential for postage rate savings. Adding a ZIP+4 to an address is one example.

Behavioral Data
Consists of individual lifestyle, product usage, and psychographic information compiled from response surveys as well as interactive registration files.

Business List
A compilation of individuals or companies, based upon a business interest, inquiry, membership, subscription, or purchase.

CASS Certification
The Coding Accuracy Support System is a USPS program by which addresses can be certified and standardized to increase accuracy of addresses and deliverability of mail. It improves the accuracy of delivery point codes, ZIP+4 codes, 5–digit ZIP codes, and carrier route information on mail pieces. CASS provides a common platform to measure the quality of address matching software and useful diagnostics to correct software problems.

Compiled List
Names and addresses derived from directories, newspapers, public records, retail sales slips, trade show registrations, *etc.*, to identify groups of people with something in common.

Consumer List
A list of names compiled or resulting from a common inquiry or buying activity, indicating a general or specific buying interest.

C.P.M.
An acronym for Cost Per Thousand (think "Roman numeral" where M = 1,000). This refers to the total cost per thousand pieces of direct mail.

Data Appending
The process of adding consumer or business database information to customer lists to match specific marketing criteria.

Data Enhancement
The process of appending a file with consumer or business database information.

Decile
One of the points on a scale of the frequency distribution of data which divide the data into ten parts, each having the same frequency.

Demographics
Socioeconomic characteristics pertaining to a geographic unit (*e.g.*, country, city, sectional center, ZIP code, group of households, education level, ethnicity).

Direct Marketing
A system of marketing that uses one or more advertising medium to effect a measurable response and/or transaction at any location.

DNC
An acronym for Do-Not-Call.

DPV
An acronym for Delivery Point Validation. This validates addresses that are confirmed USPS delivery points that have ZIP+4 codes. It helps ascertain whether an address is for a commercial mail receiving agent.

eMAIL
Electronic mail.

FedEx
The shipping company Federal Express.

Footer
Information displayed at the bottom of a page.

FTC
An acronym for the Federal Trade Commission.

Fund Raising List
Any compilation or list of individuals or companies, based on a known contribution to one or more fund raising appeals.

Header
Information displayed at the top of a page.

Hot-Line List
The most recent names/addresses available on a specific list, usually a separate, standalone file.

House List or House File
A list of names owned by a company as a result of compilation, inquiry, buyer action, or acquisition, that is used to promote that company's products or services.

Inter-List Duplicate
Duplication of name and address records between two or more lists, other than House Lists.

Intra-List Duplicate
Duplication of name and address records within a given list.

jpeg
A graphics file notable for the high quality of color pictures it provides. It is commonly used for logos.

Key Code
A group of letters and/or numbers, colors, or other markings, used to measure specific effectiveness of media, lists, advertisements, offers, *etc.*

Lifestyle Segmentation
Provide outgoing direct mail into coded lifestyle groups for testing or to improve response.

List Broker
A specialist who makes all necessary arrangements for one company to use the list(s) of another company.

List Buyer
One who orders mailing lists for either one-time or multiple use.

List Compiler
One who develops lists of names and addresses from directories, newspapers, public records, sales slips, trade show registrations, and other sources for identifying groups of people or companies with something in common.

List Manager
A business entity of a list owner or an outside agent that is responsible for the use by others of specific lists.

List Rental
An arrangement whereby a list owner furnishes names to another person or company who has the privilege of using the list on a one-time or multi-use arrangement.

List Royalty
Payment to list owners for the privilege of using their list of names on a one-time or multi-use arrangement.

List Segmentation or List Selection
Characteristics used to define smaller groups within a list.

Master File
A file that is of a permanent nature or regarded in a particular job as authoritative. It may be one that contains all sub-files.

Match Code
A code determined either by the creator or by the user of a file for matching records contained in another file.

Merge/Purge
A process that combines two or more lists into a single unit and then identifies and/or purges the master list of all duplicates.

Mortgage Data
Information gathered from public and private sources relating to the characteristics dealing with the mortgage industry. It is helpful in finding candidates for refinancing, second mortgages, and such.

NCOA

An acronym for National Change of Address System. Changed addresses are maintained here for 36 months. The file contains individual move, family move, and firm move records.

NCOA^{Link}

A USPS system for updating address records. The NCOA^{Link} file contains more than 40 million permanent change of address records filed with the USPS covering an eighteen-month period.

Net Name Arrangement

An agreement, at or before the time of ordering, whereby the list Owner agrees to accept adjusted payment for less than the total names shipped to the list user. For example, such arrangements may be for a percentage of the names shipped or for the names actually mailed or called.

Net Names

The actual names used in a mailing, after removing the duplicates and matches to the customer's list. In some cases, names can be rented on a net-name basis.

Nth

A number used to limit the output records to a specified number selected throughout the input file. This ensures an even distribution of usage among the names.

Overlay

A process that enables the user to selectively add data from a consumer or business database to the customer's files to create better targeted marketing efforts. Also called data appending and data enhancement.

Phone Append

A process that adds consumer or business phone numbers to a customer's files. The process can also verify phone numbers already present on the customer's files.

Postal Pre-Sort

The process by which a mailer prepares mail so that it is sorted to at least the finest extent required by the standards for the rate claimed. Generally, presort is performed sequentially, from the lowest (finest) level to the highest level, to those destinations specified by standard and is completed at each level before the next level is prepared. Not all presort levels are applicable in all situations.

Pressure Sensitive Label

An adhesive label affixed to a non-adhesive computer form.

Sample Mail Piece

An example or reasonable facsimile of the piece to be mailed by the user of a particular list. This sample piece must be submitted to the list Owner or Manager for approval before the mail date.

SCF

An acronym for Sectional Center Facility.

Segmentation

Provide outgoing direct mail in coded groups for testing or to improve response. The practice is also used to classify customers into groups for varying tactics.

State/CF/ZIP Count
The number of names and addresses for a specific geographic unit.

Suppression File
A specific list of people who are not to be sent promotional mail, such as the marketer's current customers, bad debt customers, people who have requested not to receive direct mail promotions, and people who do not wish to receive telemarketing calls.

UPS
The shipping company United Parcel Service.

USPS
An acronym for the United States Postal Service.

ZIP
An acronym for Zoning Improvement Plan. This system of 5–digit codes identifies geographic locations and specific delivery post offices, stations, branches, buildings, or other large mailing groups in the United States.

ZIP+4
ZIP+4 adds onto the original 5–digit ZIP code. These four add-on digits pinpoint the sector and segment of a specific delivery area.