

MARY KAY®
InTouch

Welcome
Омина Мергенбаева



Help | русский | logout

myCustomers Orders Customers Reminders

New Order New Customer

Welcome to myCustomers!

Manage your customer list and order
information in one easy to access location.



Customers 8

View your customer list and add, edit and
modify your customer profile information -
including phone numbers, email addresses,
product preferences and more.

[Manage Your Customers](#)

Orders 1

Manage your new, pending or processed
orders from your Personal Web Site/My Mary
Kay Web Site, or from sales tickets you have
created.

[Manage Your Orders](#)

Reminders

Create reminders to help you stay on top of
your business. This section will even
automatically generate reminders for you!

[Manage Your Reminders](#)

v2.1.48.8 © Mary Kay 2013

myCustomers Reference Guide

Section Links

[myCustomers Dashboard/Home](#)

[Add Customers](#)

[Customer List](#)

[Customer Profile](#)

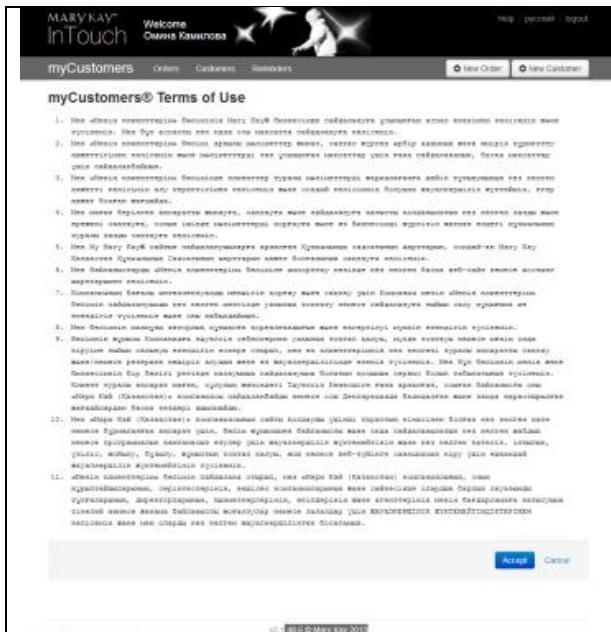
[Create a New Order for a Customer](#)

[Order List](#)

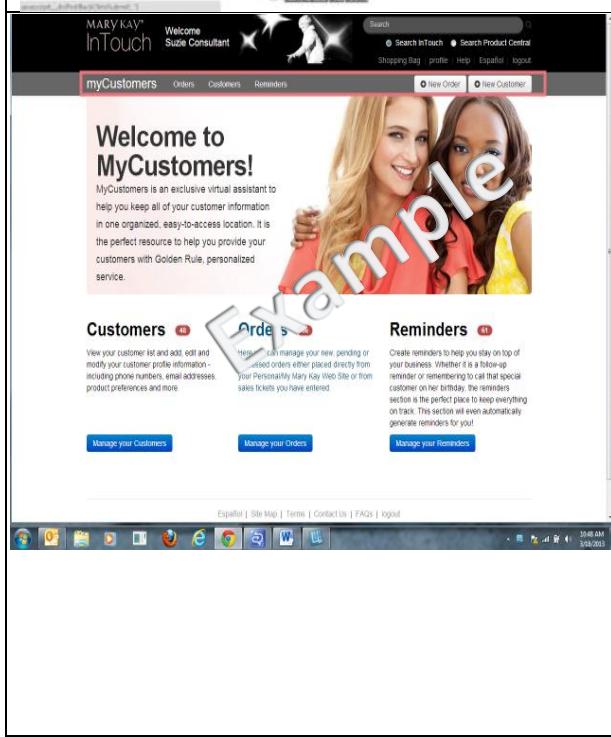
[Process an Online Order from a Customer](#)

[Reminders](#)

myCustomers Dashboard



The **first time** you log in to myCustomers a **Terms of Use Agreement** displays. After reading through the agreement, if you agree with the terms and want to use myCustomers, click **Accept**. If you do not agree to the terms and do not want to use myCustomers, click **Cancel**.

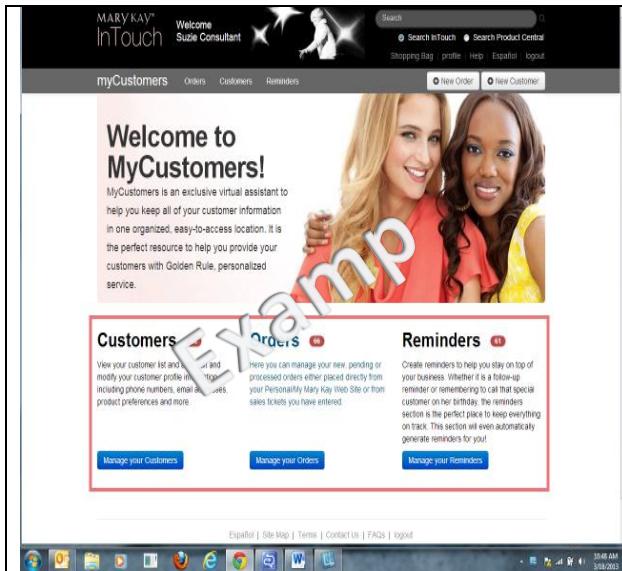


In myCustomers, customer management is as easy as 1-2-3!

Navigation Bar

The **Navigation Bar** is visible and available to use on every screen in myCustomers

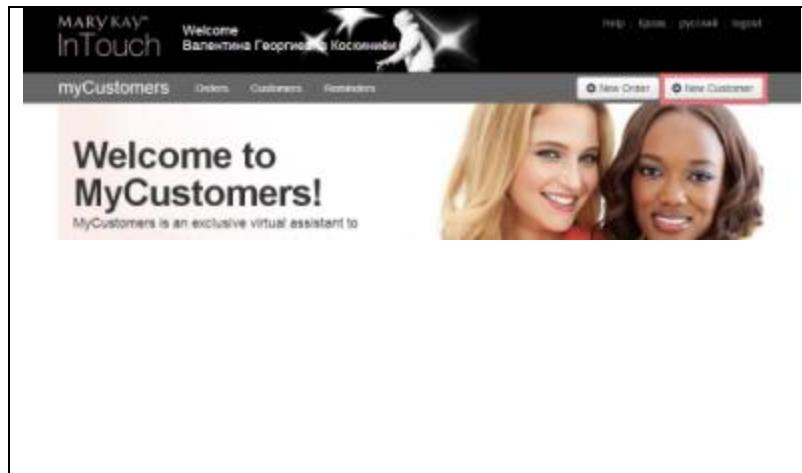
- Click **myCustomers** to return to the **Home** page
- Click **Orders, Customers, or Reminders** to go to their respective pages
- Click **New Order** to select a customer from the customer list and create a new order
- Click **New Customer** to add a new customer to your customer list or create and order for that customer



Dashboard section

- 3 options are available – **Customers**, **Orders** and **Reminders**
- Click anywhere on **Customers**, **Orders** or **Reminders** to open the page you need or click the **Manage Your Customers**, **Manage Your Orders** or **Manage Your Reminders** buttons
- The **Customers** option is where to view your customer list and add, edit or modify your customer profile information
- The **Orders** section is where to manage new, pending or processed orders from your My Mary Kay® Web Site, or from sales tickets
- The **Reminders** option is where to create your “To Do” list so you can provide the personalized customer service you are known for.
- Your total number of customers is displayed next to **Customers**
- The number of new orders from your Mary Kay Personal Web Site is displayed next to **Orders**

Adding Customers to myCustomers

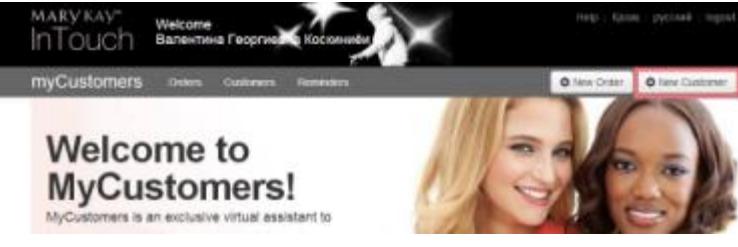
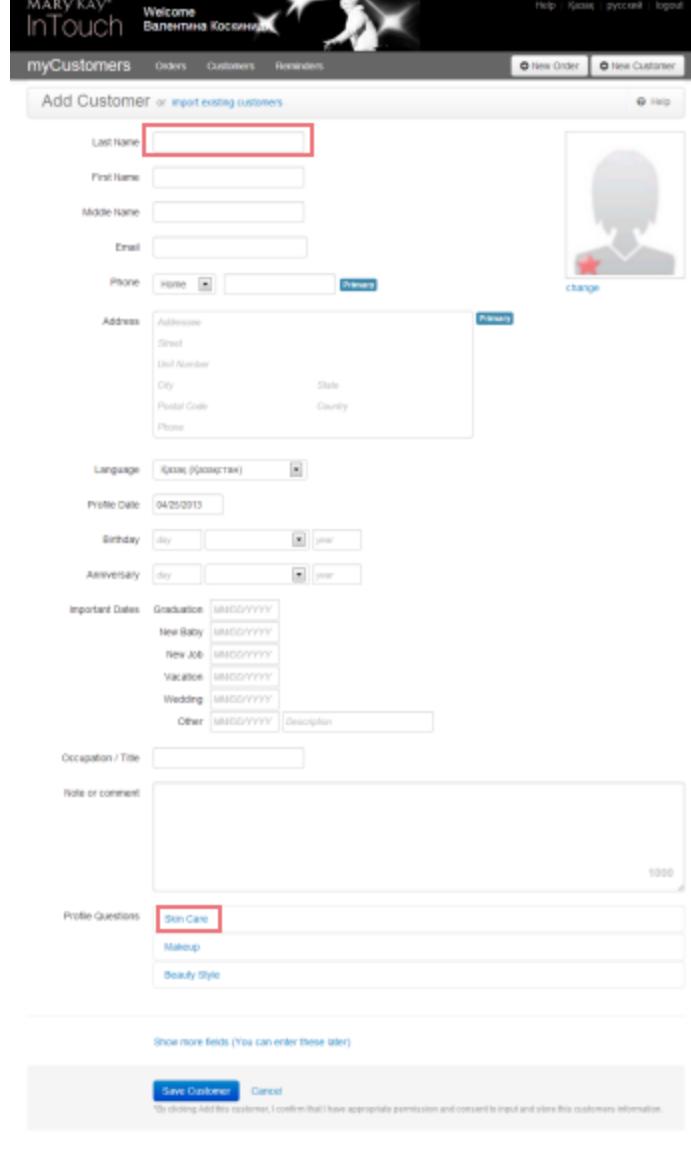
The screenshot shows the Mary Kay InTouch software interface. At the top, there's a dark header bar with the "MARY KAY® InTouch" logo, a "Welcome" message in Russian ("Валентина Георгиевна Костюнина"), and navigation links for "Help", "Logout", "Russian", and "Logout". Below the header is a menu bar with "myCustomers", "Orders", "Customers", and "Reminders". On the right side of the menu bar are two buttons: "New Order" and "New Customer", with "New Customer" being highlighted with a red border. The main content area has a title "Welcome to MyCustomers!" and a subtext "MyCustomers is an exclusive virtual assistant to". To the right of the text is a photograph of two women smiling. At the bottom of the screenshot, there's a horizontal bar with some icons.

myCustomers makes adding customers easy and quick.

You can,

- [Add a new customer](#)
- [Import customers from Facebook](#)
- [Import customers from Email](#)
- [Upload a picture](#)

How to Add a New Customer

	<p>To add a new customer in myCustomers on the Navigation Bar, click New Customer. The Navigation Bar is visible throughout myCustomers.</p>
 <p>The Add Customer page opens.</p> <p>The Add Customer page contains similar information to the Customer Profile so you can store all of your important customer information online. Some fields, like the name, phone and address fields are open and ready for you to enter the customer's information. However, all fields are not automatically open but every unopened field has an "explanation" in blue print beside it.</p> <p>To begin, click inside each open field (or press the Tab key to move between fields) and enter the required information.</p> <p>To open and unopened field, click the "explanation." An open field displays.</p>	

Last Name: Gregory
First Name: Andria
Middle Name:
Email: Andria@gmail.com
Phone: **Home** 123456789 Primary
Address: Address

Click the arrow beside the **Phone** field to select the type of phone number – **Home**, **Mobile** or **Work**. Select the phone number type and enter the phone number in the **Phone** field.

Phone: **Mobile** 123456789 SMS Primary
add phone number

If **Mobile** is selected, an **SMS** checkbox is added.

Phone: **Work** 123456789 **ext** Primary
add phone number

If **Work** is selected, the **Extension** field is added.

Last Name: Gregory
First Name: Andria
Middle Name:
Email: Andria@gmail.com
Phone: **Home** 123456789 Primary
[add phone number](#)

To add a phone number, click the link, **Add Phone Number**.

Last Name: Gregory
First Name: Andria
Middle Name:
Email: Andria@gmail.com
Phone: **Work** 123456789 **ext** Primary Remove
Home 123456789 [make primary remove](#)

An additional phone field opens where another phone number can be entered.

Select the type of phone number and enter the number. If it is the primary number, click the link, **Primary Number**.

To remove a phone number, click **Remove**.

Last Name: Gregory
First Name: Andrea
Middle Name:
Email: Andrea@gmail.com
Phone: Work 123456789, Home [redacted]
Address: Address, Street, Unit Number, City, State, Postal Code, Phone

Next is the **Address** field. Enter the required information. When you begin entering the address, a link to enter a second address displays. If there are 2 addresses you have the option to make either one the primary address.

Tip! Use the **Tab** key to move field to field.

To remove an address, click **Remove**.

Profile Questions
Skin Care
Makeup
Beauty Style

In the Profile Customers section, the questions are similar to those on the Profile Card.

To open a field, click the blue link. In this example we click the **Makeup** link.

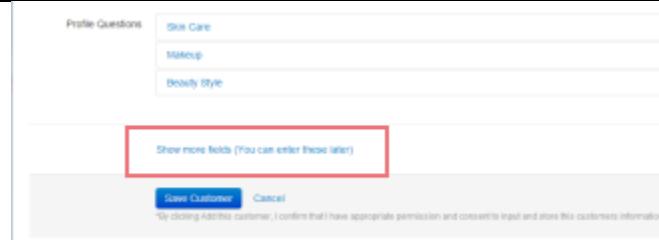
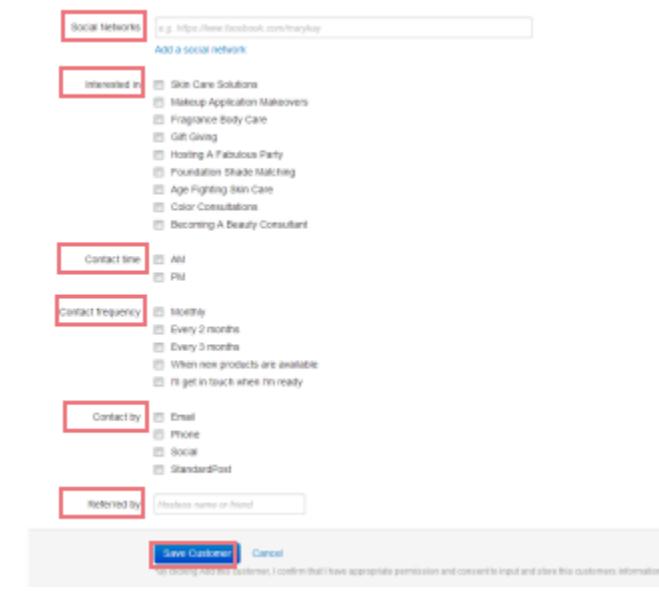
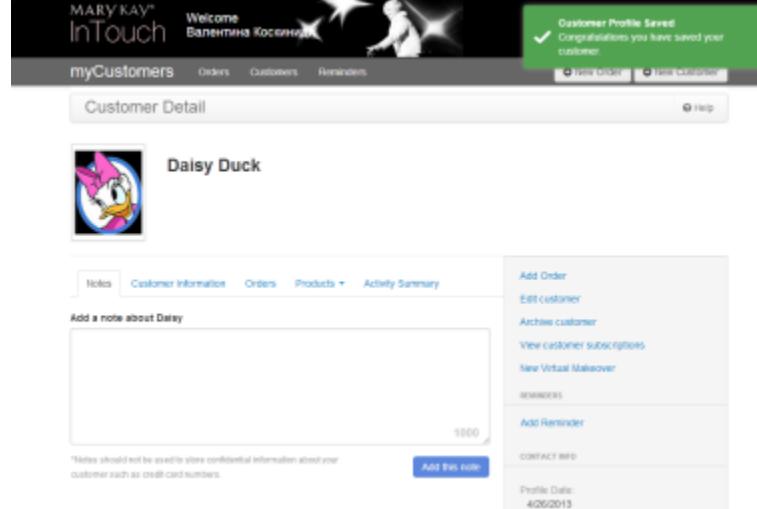
Profile Questions
Skin Care
Makeup
1. I think my skin tone is:
Light Ivory, Ivory, Light Beige, Beige, Light Bronze, Bronze
2. My eye color is:
Brown, Blue, Hazel, Green
3. My hair color is:
Brown, Black, Bleach, Grey, Red
4. My eyebrow color is:
Light Blonde, Dark Blonde, Brown, Red, Black, Grey
5. When considering foundation, what is THE most important benefit to you?
 Age-fighting
 Mineral
 Oil Control
 Long-Wearing
6. What type of foundation coverage do you prefer?
 Light: I prefer a natural sheer finish with no after-feel
 Medium: I want to even my skin tone with a little coverage that feels comfortable
 Full: I prefer more coverage to hide imperfections and provide a finished look without a cakey feel
Beauty Style

The link opens and displays a series of questions concerning the customer's skin tone, eye color, hair color, eyebrow color and more.

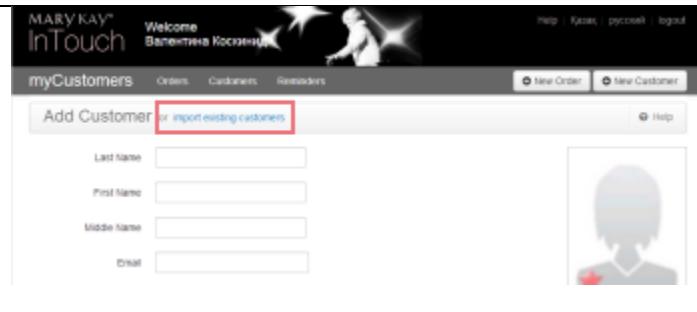
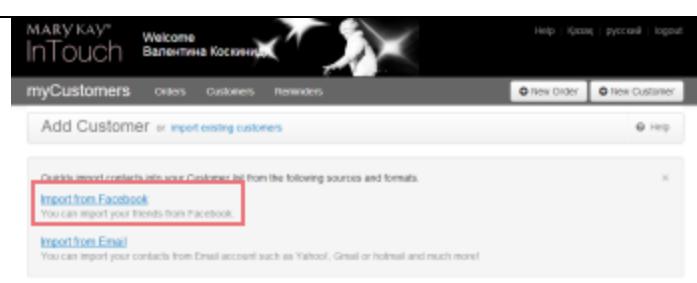
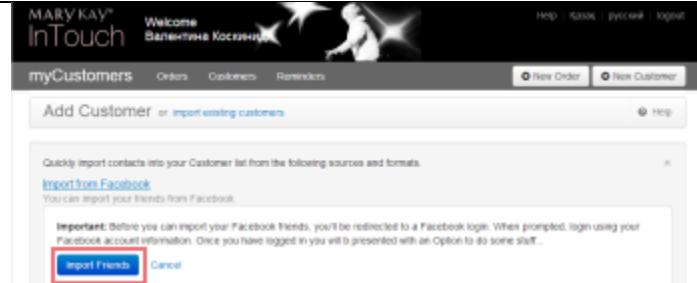
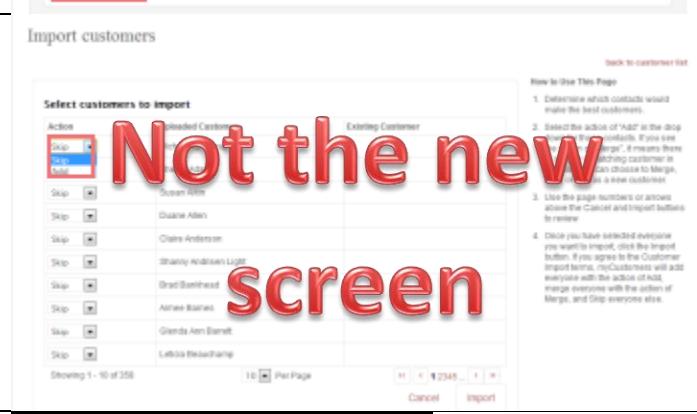
Complete the section by selecting the appropriate option for each item.

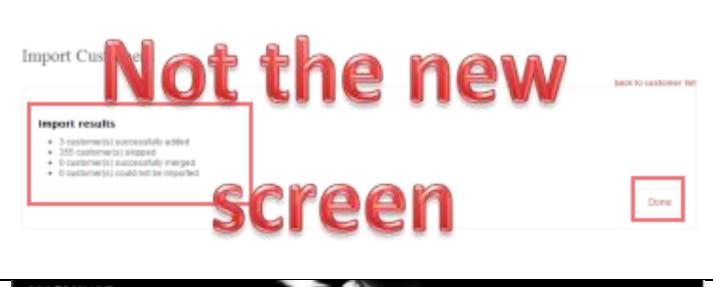
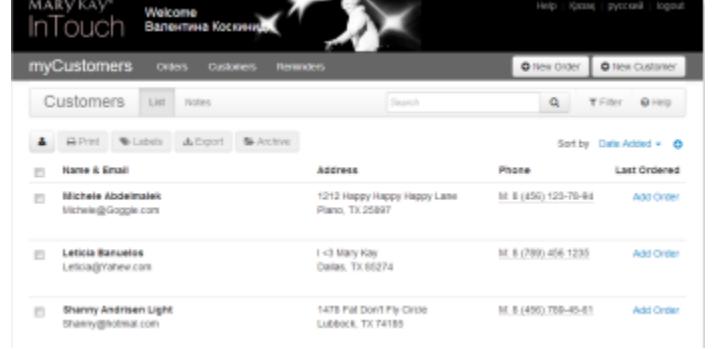
Tip! If you do not know all of the answers or have a profile for this customer, use this as an opportunity to connect with her and complete it together by phone. She has the same options under myMK on the Mary Kay Personal Website.

Close the section by clicking the link.

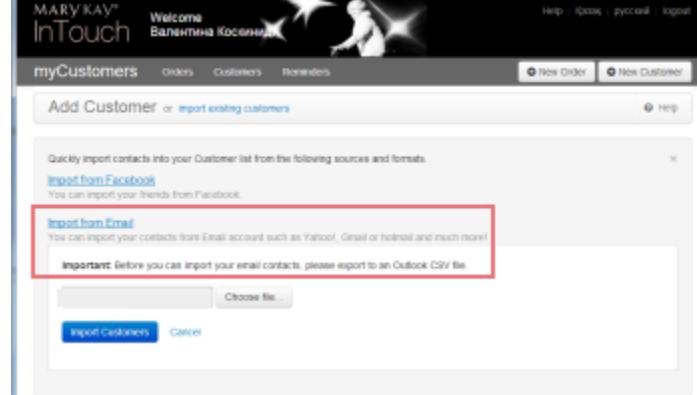
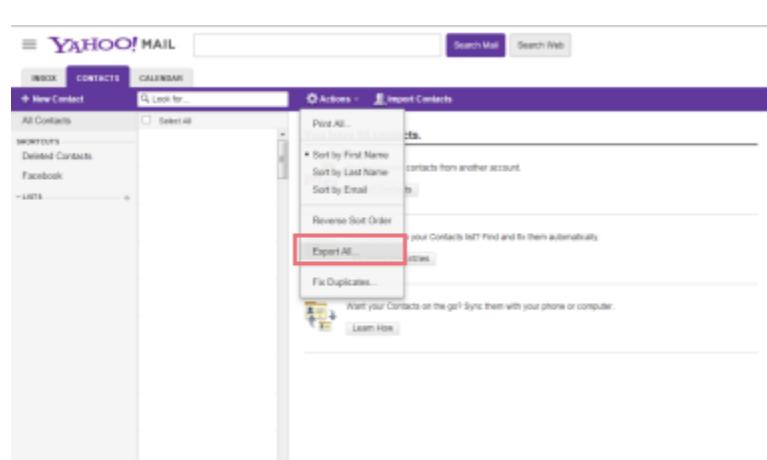
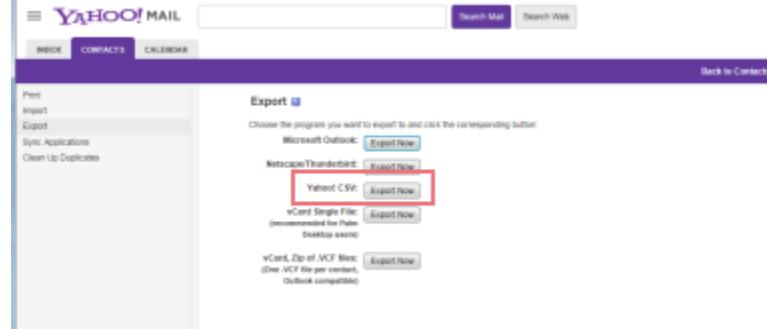
 <p>Show more fields (You can enter these later)</p> <p>Save Customer Cancel</p> <p><small>By clicking Add this customer, I confirm that I have appropriate permission and consent to input and store this customers information.</small></p>  <p>Social Networks e.g. https://www.facebook.com/marykay Add a social network</p> <p>Interested in</p> <ul style="list-style-type: none"> <input type="checkbox"/> Skin Care Solutions <input type="checkbox"/> Makeup Application Makeovers <input type="checkbox"/> Fragrance Body Care <input type="checkbox"/> Gift Giving <input type="checkbox"/> Hosting A Fabulous Party <input type="checkbox"/> Foundation Shade Matching <input type="checkbox"/> Age Fighting Skin Care <input type="checkbox"/> Color Consultations <input type="checkbox"/> Becoming A Beauty Consultant <p>Contact time</p> <ul style="list-style-type: none"> <input type="checkbox"/> AM <input type="checkbox"/> PM <p>Contact frequency</p> <ul style="list-style-type: none"> <input type="checkbox"/> Monthly <input type="checkbox"/> Every 2 months <input type="checkbox"/> Every 3 months <input type="checkbox"/> When new products are available <input type="checkbox"/> If get in touch when nn ready <p>Contact by</p> <ul style="list-style-type: none"> <input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Social <input type="checkbox"/> StandardPost <p>Referred By <input type="text" value="However name or friend"/></p> <p>Save Customer Cancel</p> <p><small>By clicking Add this customer, I confirm that I have appropriate permission and consent to input and store this customers information.</small></p>	<p>The Additional fields are available by clicking Show More Fields.</p> <p>The following additional questions are displayed,</p> <ul style="list-style-type: none"> • Social Networks • Interested in • Contact Time • Contact History • Contact By • Referred by <p>When you are finished, click Save Customer.</p> <p>If you decide not to add the customer, click Cancel.</p>
 <p>MARY KAY® InTouch Welcome Валентина Косарева</p> <p>myCustomers Orders Customers Reminders</p> <p>Customer Detail Help</p> <p>Daisy Duck</p> <p>Customer Information</p> <p>Add a note about Daisy</p> <p><small>*Notes should not be used to store confidential information about your customer such as credit card numbers.</small></p> <p>Add this note</p> <p>Add Order</p> <ul style="list-style-type: none"> Edit customer Archive customer View customer subscriptions New Virtual Makeover <p>REMINDERS</p> <p>Add Reminder</p> <p>CONTACT INFO</p> <p>Profile Date: 4/26/2013</p>	

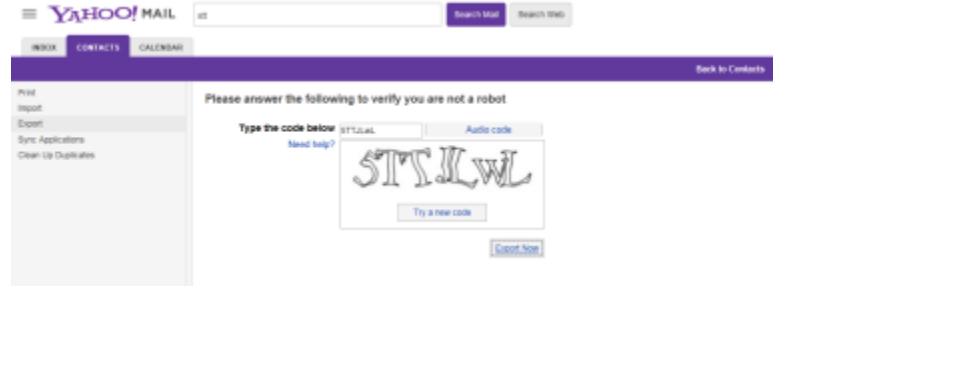
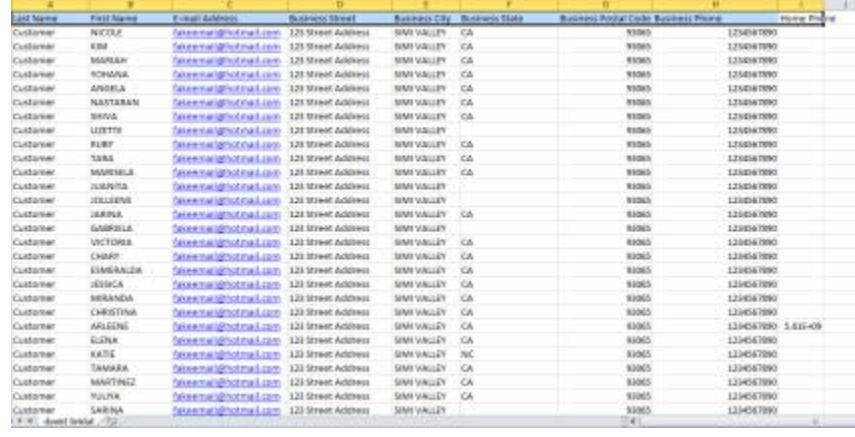
How to Import Customers from Facebook

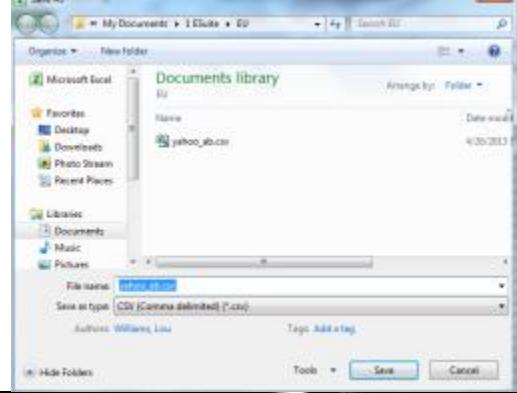
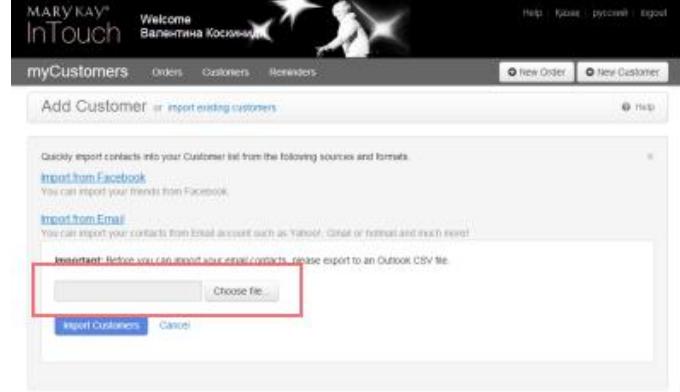
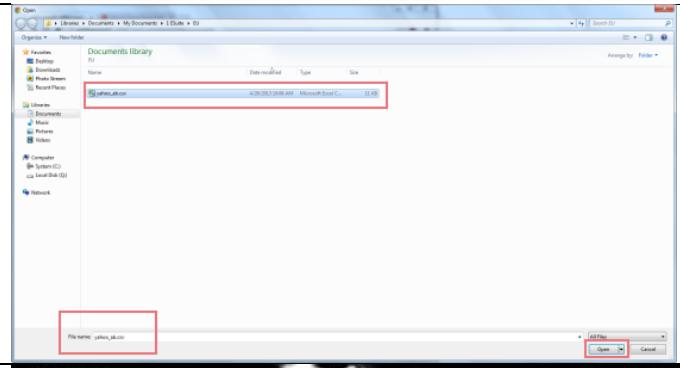
	<p>Do you have customers who are friends on Facebook but have not been added to your myCustomers Customer List? It's quick and easy to import customers using the import tool.</p> <p>On the Add Customers page, click the link, "Import Existing Customers."</p>
	<p>The Import Bar opens. Click the link, Import from Facebook.</p>
	<p>An alert displays to let you know that you may be required to login Facebook.</p> <p>Click Import Friends to continue. Click Cancel if you choose not to continue.</p>
	<p>Actual procedure is not working. May need to redo once functioning as it should.</p> <p>Once you have opened Facebook a list of your friends is displayed. You have 2 options – Skip or Add. The default setting is Skip.</p> <p>Once you have gone through the list on each page and selected the customer you wish to add, click Import.</p>
	<p>Actual procedure is not working. May need to redo once functioning as it should.</p> <p>A Confirmation screen displays to confirm you do want to import the selected customers. Click I Agree to continue.</p> <p>Click Cancel to stop the import.</p>

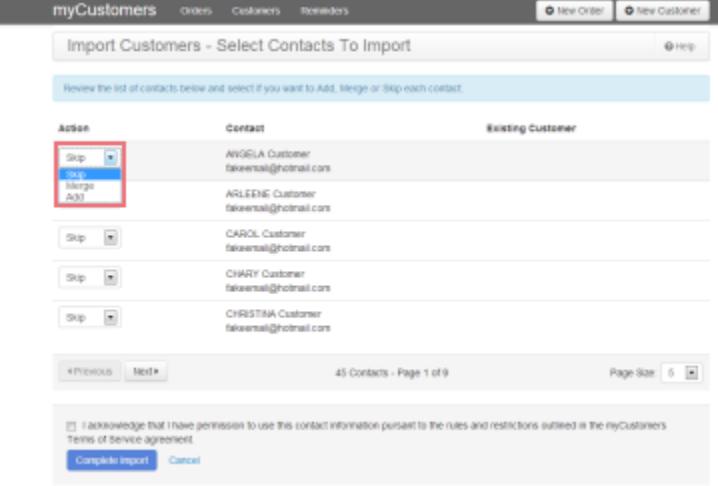
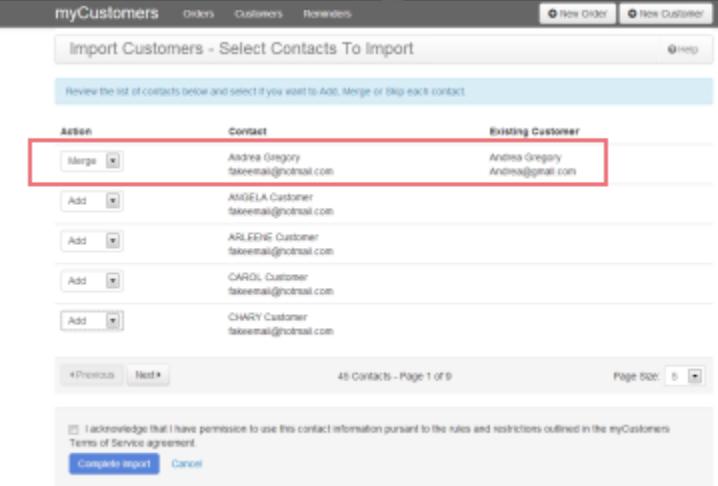
 <p>Not the new screen</p> <p>Import results</p> <ul style="list-style-type: none"> 3 customer(s) successfully added 355 customer(s) skipped 0 customer(s) successfully merged 0 customer(s) could not be imported <p>Done</p>	<p>Actual procedure is not working. May need to redo once functioning as it should.</p> <p>A recap of the import is displayed.</p> <p>Click Done.</p>																
 <p>MARY KAY® InTouch Welcome Бланкетта Косички Help Logout myCustomers Orders Customers Reminders New Order New Customer Customers List notes Search Filter Help</p> <p>Name & Email Address Phone Last Ordered</p> <table border="1"> <thead> <tr> <th>Name & Email</th> <th>Address</th> <th>Phone</th> <th>Last Ordered</th> </tr> </thead> <tbody> <tr> <td>Michelle Abdelsalek Michelle@Goggle.com</td> <td>1212 Happy Happy Happy Lane Plano, TX 25897</td> <td>Mr. B (450) 123-78-89</td> <td>Add Order</td> </tr> <tr> <td>Leticia Barreto Leticia@fonever.com</td> <td>I-3 Mary Kay Dallas, TX 65274</td> <td>Mr. B (799) 456 1235</td> <td>Add Order</td> </tr> <tr> <td>Sherry Andriksen Light Sherry@tulmat.com</td> <td>1478 Fall Don't Fly Circle Lubbock, TX 74185</td> <td>Mr. B (499) 789-45-81</td> <td>Add Order</td> </tr> </tbody> </table>	Name & Email	Address	Phone	Last Ordered	Michelle Abdelsalek Michelle@Goggle.com	1212 Happy Happy Happy Lane Plano, TX 25897	Mr. B (450) 123-78-89	Add Order	Leticia Barreto Leticia@fonever.com	I-3 Mary Kay Dallas, TX 65274	Mr. B (799) 456 1235	Add Order	Sherry Andriksen Light Sherry@tulmat.com	1478 Fall Don't Fly Circle Lubbock, TX 74185	Mr. B (499) 789-45-81	Add Order	<p>The customer list displays.</p> <p>To view the customers you added, click Sort By and select Date Added from the drop-down menu.</p> <p>Customers who were added most recently are listed first.</p>
Name & Email	Address	Phone	Last Ordered														
Michelle Abdelsalek Michelle@Goggle.com	1212 Happy Happy Happy Lane Plano, TX 25897	Mr. B (450) 123-78-89	Add Order														
Leticia Barreto Leticia@fonever.com	I-3 Mary Kay Dallas, TX 65274	Mr. B (799) 456 1235	Add Order														
Sherry Andriksen Light Sherry@tulmat.com	1478 Fall Don't Fly Circle Lubbock, TX 74185	Mr. B (499) 789-45-81	Add Order														

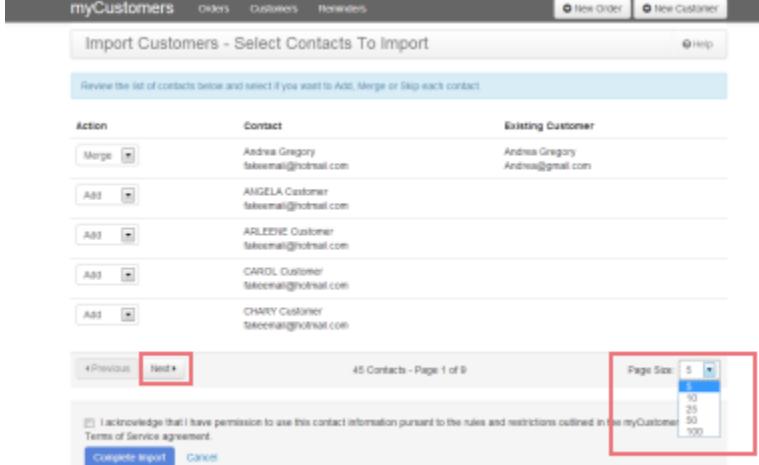
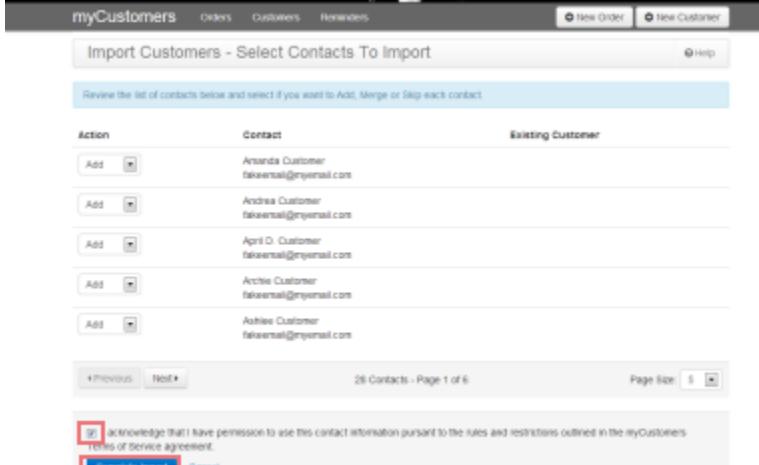
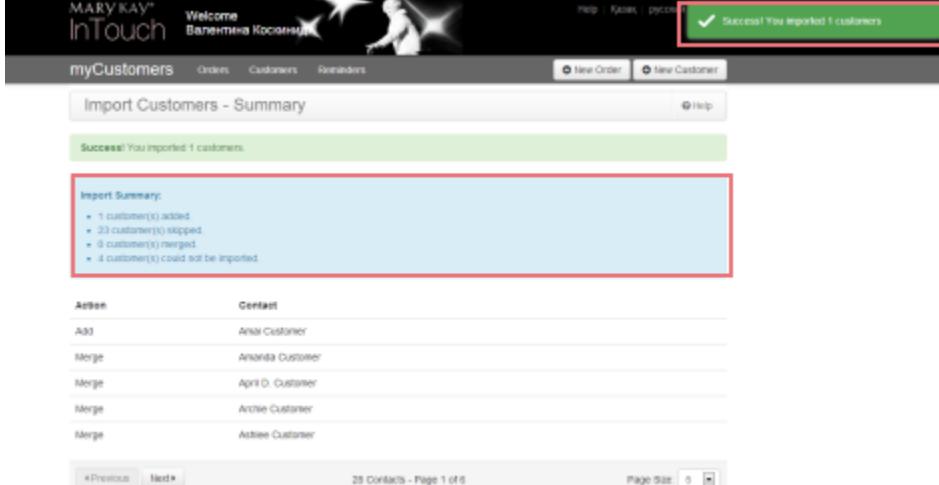
How to Import Customers from Email

	<p>Contacts in your email can be imported into myCustomers.</p> <p>However before you can start there is some preparation you will have to do first.</p> <p>In order to import your contacts they have to be in a CSV file. To create a CSV file, open your email service where your contacts are stored.</p>
	<p>For this example we will use Yahoo to illustrate how to export contacts into a CSV file.</p> <p>First locate the Export option in your email service. In Yahoo, it is located under Contacts and then Actions.</p> <p>From the drop-down menu, select Export.</p>
	<p>Several export options are available. We will choose Yahoo CSV and click Export Now.</p>

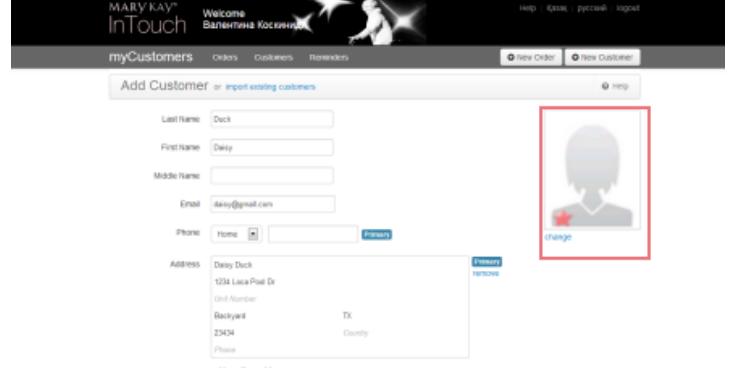
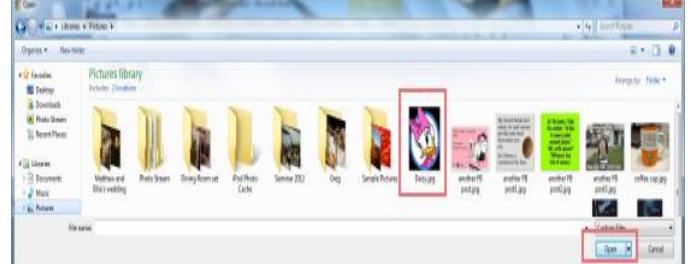
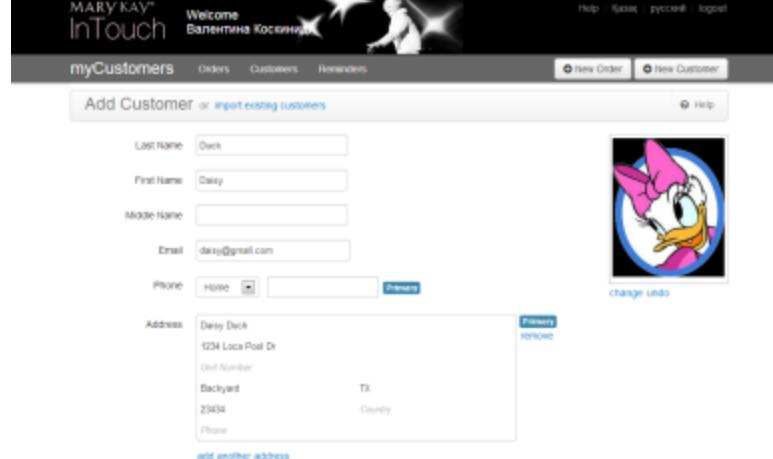
	<p>To ensure security, you may be asked to enter a code. If not, you may skip this step.</p> <p>Click Export Now to complete creating the CSV file.</p>
	<p>The file is automatically created in Excel. However it still may not meet the requirement that it is in the Outlook CSV format.</p>
	<p>To meet the Outlook CSV format requirement, column headers may need to be revised or columns deleted. The required column headers are:</p> <ul style="list-style-type: none"> • Last Name • First Name • Email Address • Business Street • Business State • Business Postal Code • Business Phone • Home Phone

	<p>You will be given the option to save the file. Be sure to save it where you can find it again under a name you will recognize in the CSV format.</p> <p>Click Save.</p>
	<p>Click Choose File to find the CSV file you created.</p>
	<p>The Open File screen displays.</p> <p>Click the CSV file to select it. The name of the file displays in the File Name field.</p>
	<p>Click Open.</p> <p>Back on the Add Customer page, the file name is displayed in the Choose File field.</p> <p>Click Import.</p>

 <p>The Import Selection screen displays where you have the option to Skip, Merge or Add each customer</p> <p>Use Skip if you don't want to add a customer.</p> <p>Use Merge to add additional information for an existing customer. Existing customers are</p> <p>Use Add to enter a brand new customer.</p>	
 <p>Existing customers are recognized by the system and a notification is displayed.</p>	

	<p>Increase the number of customers by changing the Page View number.</p> <p>Click Next to move to the next page and continue.</p>
	<p>When you are finished, if you agree and would like to continue, click the Terms of Agreement checkbox.</p> <p>Click Complete Import.</p> <p>This can take a few minutes, so please be patient.</p>
	<p>A Confirmation screen displays that the import was successful.</p> <p>A recap displays to let you know which customers imported successfully and who did not.</p> <p>To leave this screen click an option on the Navigation bar.</p>

How to Add Your Customer's Picture

	<p>If your customer hasn't added her picture using her MyMK account on the Personal Website, and if you have a picture of her, you can add it in the Add Customer page.</p> <p>To add your customer's picture, click Change.</p>
	<p>The Open File screen opens. Find the customer's picture.</p> <p>Select the picture.</p> <p>Click Open.</p>
	<p>The customer's picture you selected is displayed.</p>

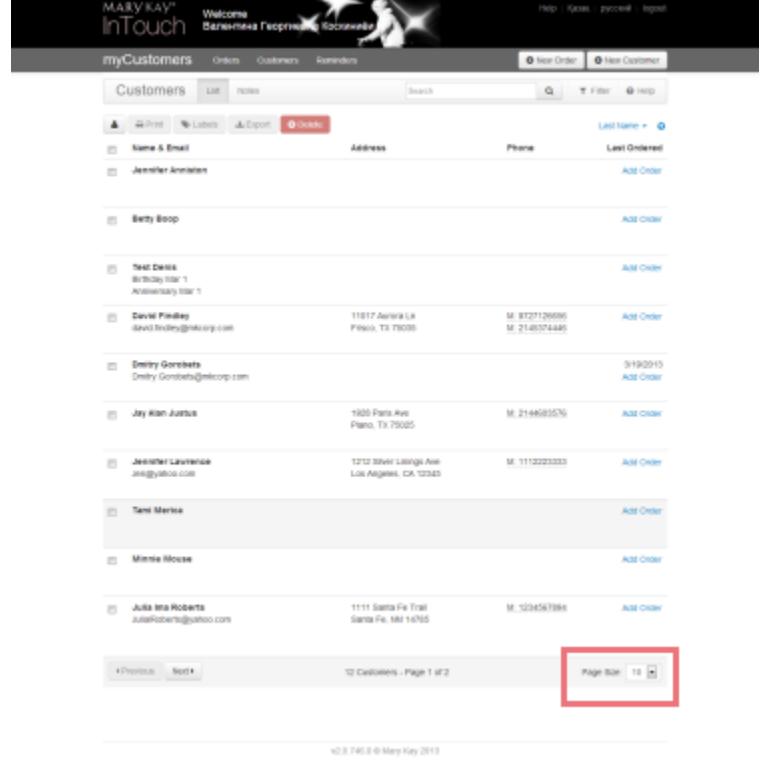
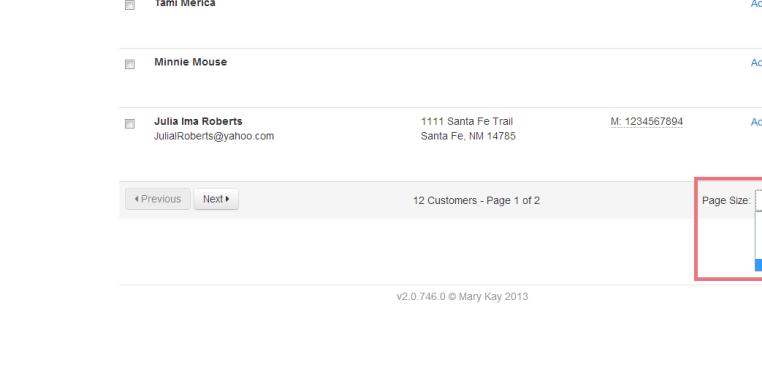
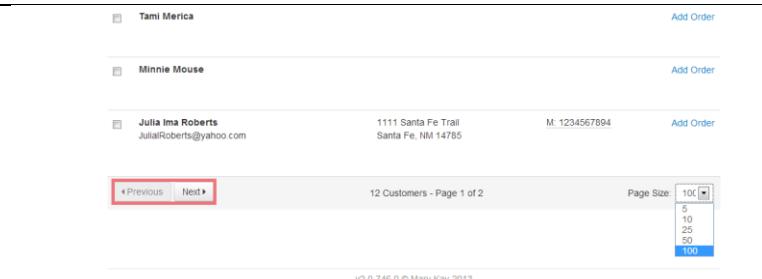
Customers

The screenshot shows the 'Customers' page of the MARY KAY InTouch software. At the top, there's a header with the MARY KAY logo and the text 'Welcome Екатерина Георгиева Косметолог'. Below the header is a navigation bar with links for 'myCustomers', 'Orders', 'Customers', 'Reminders', and buttons for 'New Order', 'New Customer', 'Print', 'Labels', 'Export', and 'Delete'. A search bar with a 'Filter' button is also present. The main area displays a list of customers with columns for 'Name & Email', 'Address', 'Phone', and 'Last Ordered'. Each customer entry includes a checkbox, a 'Print' link, and an 'Add Order' link. The list includes entries for Jennifer Anniston, Betty Boop, David Findley, Dmitry Gorobets, Jay Alan Justus, Jennifer Lawrence, and Tami Merica. At the bottom left, there's a message 'Waiting for validation...'. The background features a dark theme with some decorative elements.

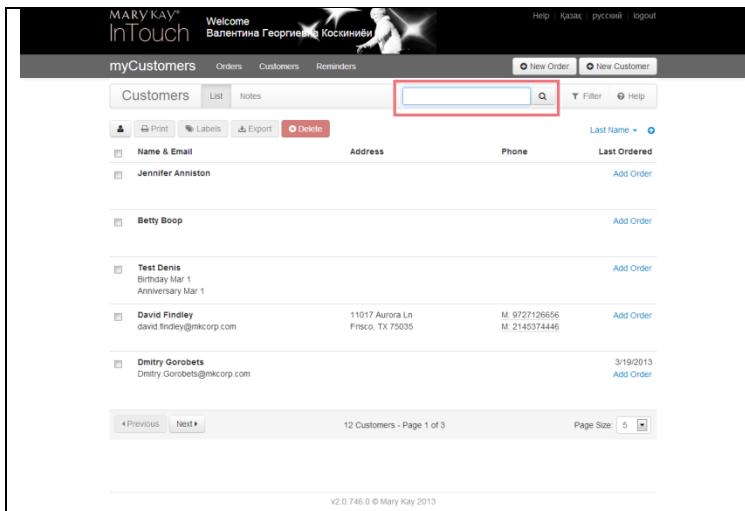
In the **Customers** page you can,

- [How to View your Customer List](#)
- [How to use Search](#)
- [How to use Advanced Search](#)
- [Filter customers based on pre-defined criteria such as, Date Added, Last Order Date, Birthday or Anniversary.](#)
- [View customer notes](#)
- [Search customer notes](#)
- [Print customer lists for individually selected customers.](#)
- [Print a customer list of all of your customers](#)
- [Print a customer list from a filtered list](#)
- [Create labels for individually selected customers](#)
- [Create labels for all customers](#)
- [Create labels for a filtered list of customers](#)
- [Export and create an Excel spreadsheet for individually selected customers](#)
- [Export and create an Excel spreadsheet for all customers](#)
- [Export and create an Excel spreadsheet for a filtered list of customers](#)
- [Archive specific customers](#)
- [View customers who are archived](#)
- [Move a customer from the Archived List](#)
- [Sort the customer list](#)
- [View the Profile Page for a specific customer](#)
- [Select a customer to create an order](#)

How to View the Customer List

 <p>The screenshot shows the 'Customers' list page in the Mary Kay InTouch software. At the top, there are navigation links for Help, Home, Account, and Logout. Below that is a search bar and a 'List' button. The main area displays 12 customer entries, each with a checkbox, Name & Email, Address, Phone, and Last Ordered. There are also 'Add Order' buttons next to each entry. At the bottom, there are 'Previous' and 'Next' buttons, a 'Page Size' dropdown set to 10, and a copyright notice: v2.0.746.0 © Mary Kay 2013.</p>	<p>Click Customers to open a list of your customers.</p> <p>The default number of customers viewable on a page is 10.</p>
 <p>This screenshot is identical to the one above, but the 'Page Size' dropdown is highlighted with a red box.</p>	<p>Change the number of customers viewable on a page to less or more than 10 by clicking the down arrow by the Page Size field and selecting the number of customers you would like to view on each page. The maximum number of customers that can be viewed on a single page is 100.</p>
 <p>This screenshot shows the same list page, but the 'Previous' and 'Next' navigation buttons at the bottom are highlighted with red boxes.</p>	<p>Click the Previous and Next buttons to move between pages</p>

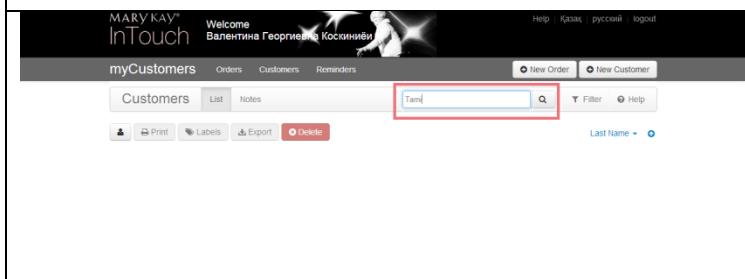
How to Search for a Customer



The screenshot shows the 'myCustomers' software interface. At the top, there's a navigation bar with links for 'Orders', 'Customers', and 'Reminders'. Below the navigation is a search bar with a magnifying glass icon. A red box highlights this search bar. The main area displays a list of customers with columns for 'Name & Email', 'Address', 'Phone', and 'Last Ordered'. Each customer entry includes a checkbox and an 'Add Order' link. At the bottom, there are buttons for 'Previous' and 'Next', a page size selector, and copyright information.

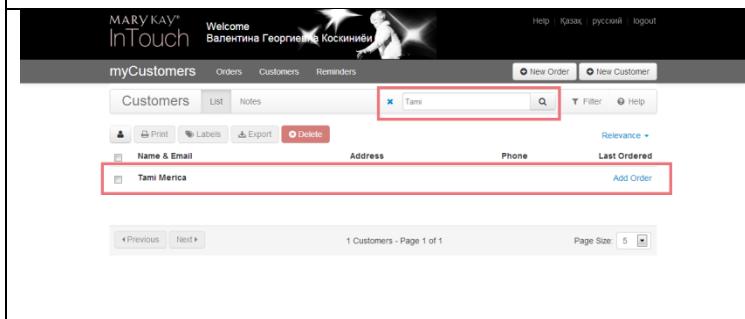
myCustomers provides a variety of search and filter options you can use to find the exact information you need.

To get started, click inside the **Search** field.



This screenshot shows the same software interface as the first one, but now the search bar contains the name 'Tami'. A red box highlights the search bar. The rest of the interface remains the same, showing the customer list.

To find a specific customer, type the customer name, first, last or both and press the **ENTER** key or click the **magnifying glass** search icon. Other search criteria you can use include phone number or street name.



This screenshot shows the search bar with 'Tami' typed in again. A red box highlights the search bar. To the left of the search bar, there is a small red box containing a white 'X' button, which has been clicked. The customer list below shows one result: 'Tami Merica'. A red box highlights this customer entry.

The customer is displayed.
Click **Add Order** to create an order for this customer.
Click the customer's name to open her/his **Profile** page.
Click the blue "X" beside the **Search** field to clear it and return to the customer list.

How to Use Advanced Search in the Customer List

This screenshot shows the 'Customers' list page in the Mary Kay InTouch software. At the top right, there is a 'Filter' button with a dropdown arrow. A red box highlights the 'Advanced' option in this dropdown menu. The main list area displays several customer entries, including Jennifer Anniston, Betty Boop, Dennis DateText, Test Denis, and David Pendley.

Advanced Search enables you to find a list of customers with the same birthday or anniversary month or to find customers who ordered, were added or registered on your Mary Kay Web Site within a specific date range.

To use Advanced Search, click **Filter**. From the drop-down menu, select **Advanced**.

This screenshot shows the 'Advanced' search filter settings. The 'Date Added' field has two date pickers set to '03/01/2013' and '04/03/2013'. The 'Birthday' field has a dropdown menu open, showing months from January to December, with 'August' highlighted by a red box. Other filter options like 'Last Order Date', 'Anniversary', and 'Deleted' are also visible.

The **Advanced Search** section is displayed. In this example we will look for customers who were added in March or April and have birthdays in August.

First click in the **Date Added** date fields. A calendar displays when you click inside the field. Choose the date you want to use from the calendar. The dates are entered automatically entered in the date range fields.

This screenshot shows the results of the advanced search. The 'Date Added' fields now show 'MM/DD/YYYY' values corresponding to the selected range. The 'Birthday' field dropdown is still open, with 'August' selected. The main list area shows one result: 'Julia Ima Roberts' with the note 'Birthday Jul 19'.

Next, click inside the **Birthday** field. A drop-down menu displays. Select the month to use for the search. For this example we are selecting August.

Immediately customers who were added in March or April and have birthdays in August are displayed.

Date Added: 03/04/2013 03/03/2013

Birthday: Select

04	05	06	07	08	09
10	11	12	13	14	15
16	17	18	19	20	21
22	23	24	25	26	27
28	29	30	31		

Searching a specific date range is easy. For this example, let's use the **DATE ADDED** date range fields.

Click inside the first field – the beginning date for the date range. A calendar automatically displays for the current month.

If you need to use a different month, click the arrows at the top of the calendar to scroll the months.

If you need a specific day, click the day. For this example we selected the 4th of March.

Date Added: 03/04/2013 03/15/2013

Birthday: Select

04	05	06	07	08	09
10	11	12	13	14	15
16	17	18	19	20	21
22	23	24	25	26	27
28	29	30	31		

The date is added immediately after you selected the day.

Repeat the steps for the next field – the end of the date range.

Select the month and day you want to use for the search.

Date Added: 03/04/2013 03/29/2013

Birthday: Select

04	05	06	07	08	09
10	11	12	13	14	15
16	17	18	19	20	21
22	23	24	25	26	27
28	29	30	31		

Name & Email	Address	Phone	Last Ordered
David Findley david.findley@mkcorp.com	11017 Aurora Ln Frisco, TX 75035	M: 9727126566 M: 2145374446	Add Order
Jay Alan Justus jayalanjustus@mkcorp.com	1828 Paris Ave Plano, TX 75025	M: 2144603576	Add Order
Julia Ina Roberts JuliaInaRoberts@yahoo.com Birthday Mar 19	1111 Santa Fe Trail Santa Fe, NM 14765	M: 1234567894	Add Order
Homer Simpson HomerSimpson@mktest.com Birthday Mar 20 Anniversary Mar 22	123 Evergreen Terrace Springfield	3/29/2013	Add Order

Anyone added to your customer list within the defined date range is automatically displayed.

The screenshot shows the MARY KAY® InTouch software interface. The top navigation bar includes links for Help, Logout, myCustomer, Orders, Customers (which is highlighted in red), and Reminders. Below the navigation bar is a search bar with fields for Date Added, Last Order Date, and Date Registered, along with dropdown menus for Birthday and Anniversary. The main content area displays a list of customers. Each customer entry includes a checkbox, a name (e.g., Jennifer Anniston, Betty Boop, Denis DateTest, Test Date, David Finley), their birthday and anniversary, and links for Add Order, Print, Labels, Export, and Delete. The last column shows the last ordered date.

Name & Email	Address	Phone	Last Ordered
Jennifer Anniston			Add Order
Betty Boop			Add Order
Denis DateTest Birthday Mar 15 Anniversary Dec 30			Add Order
Test Date Birthday Feb 1 Anniversary Feb 1			Add Order
David Finley david.finley@intecorp.com	11017 Aurora Ln Frisco, TX 75035	M: 9727126006 M: 2142574446	Add Order

To close the **Advanced Search** section, click the “X” in the upper right hand corner.

To return to the complete customer list, click **Customers** in the **Navigation Bar**.

How to Filter Customers

The image consists of three vertically stacked screenshots of the MARY KAY InTouch software interface, specifically the 'Customers' page.

Screenshot 1: Shows the main 'Customers' page with a list of customers. A red box highlights the 'Filter' button in the top right corner of the search bar.

Screenshot 2: Shows the 'Filter' button being clicked, which opens a dropdown menu. The dropdown menu is highlighted with a red box and contains the following options: Date Added, Date Registered, Last Order Date, Birthday, Anniversary, and Advanced. The 'Birthday' option is selected.

Screenshot 3: Shows the 'Filter' dropdown menu again, but this time the 'Birthday' option is highlighted with a blue selection bar.

Text on the right side:

- Use the filter on the Customer List page to quickly sort customers into a specified group.**
- To begin, click Filter.**
- A drop-down menu displays featuring pre-defined filter criteria, such as Date Added, Last Order Date, Birthday or Anniversary.**
- Select a category.**
- For this example we select "Birthdays"**

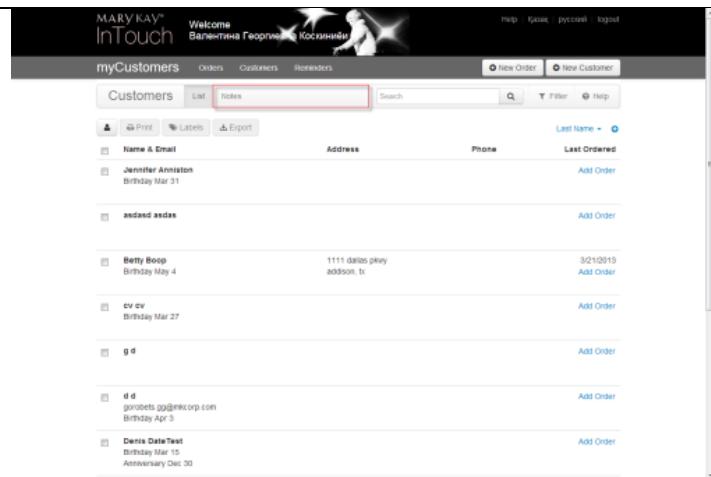
The Birthday field displays.

Click the down arrow to select a month.

For this example, we select "March"

A list of customers with birthdays in March is displayed.

How to View Customer Notes

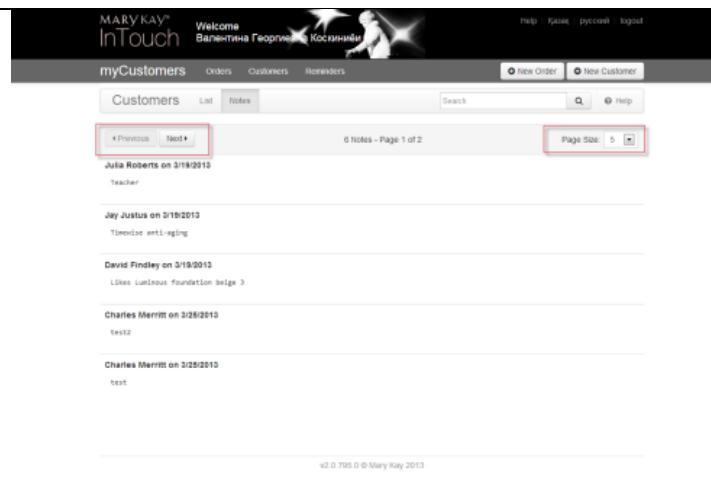


The screenshot shows the Mary Kay InTouch software interface. At the top, there's a navigation bar with links for 'Help', 'Logout', 'русский', and 'Logout'. Below it, a secondary navigation bar has tabs for 'Orders', 'Customers', and 'Reminders', with 'Customers' being the active tab. A sub-menu under 'Customers' shows 'List' and 'Notes', with 'Notes' being the active tab and highlighted with a red box. The main content area displays a list of customers with their names, email addresses, addresses, phone numbers, and last order dates. Each customer entry includes a link to 'Add Order'. The 'Notes' tab is currently selected.

In a customer's profile, notes can be added such as the type of foundation she uses or that she is a teacher or anything that you want to always remember about her.

Notes can be viewed or searched on in the customer list.

To view customer notes, click **Notes**. It is located beside **List**, at the top of the **Customer List**.



This screenshot shows the 'Notes' page of the Mary Kay InTouch software. At the top, it displays the same navigation bar as the previous screenshot. The 'Notes' tab is selected. Below the navigation bar, there are buttons for 'Previous' and 'Next', with 'Next' being highlighted with a red box. To the right of these buttons is a label '6 Notes - Page 1 of 2'. Further right is a 'Page Size' dropdown menu set to '5', with a red box around it. The main content area lists six customer notes, each with the customer's name, note content, and date. The notes are as follows:

- Julia Roberts on 3/19/2013: teacher
- Jay Justus on 3/19/2013: Timeline anti-aging
- David Findley on 3/19/2013: Likes: Luminous foundation beige 3
- Charles Merritt on 3/28/2013: test2
- Charles Merritt on 3/25/2013: test

At the bottom of the page, there's a copyright notice: '©2013 MK Corp. All rights reserved. ©2013 Mary Kay Inc.'

Notes for each customer are displayed.

Scroll through the note pages by clicking the Previous and Next buttons.

View more customer notes by increasing the number beside Page Size. Click the down arrow and select the number of customer notes you would like to see on each page.

How to Search Customer Notes

The screenshot shows the Mary Kay InTouch software interface. At the top, there's a dark header bar with the "MARY KAY® InTouch" logo, a "Welcome" message in Russian ("Валентина Георгиевна Косинский"), and navigation links for "Help", "Logout", "Logout", "Logout", and "Logout". Below the header is a menu bar with "myCustomers", "Orders", "Customers", and "Reminders". A sub-menu for "Customers" is open, showing "Customers", "List", and "Notes". On the right side of the sub-menu, there's a search field containing the word "teacher" with a magnifying glass icon next to it. Below the search field, there are buttons for "New Order" and "New Customer". The main content area displays a list of notes. The first note is for "Julia Roberts" dated "3/19/2013" with the text "Teacher". The second note is for "Jay Justus" dated "3/19/2013" with the text "Timewise anti-aging". The third note is for "David Findley" dated "3/19/2013" with the text "Likes Luminous foundation beige 3". The fourth note is for "Charles Merritt" dated "3/26/2013" with the text "test2". The fifth note is for "Charles Merritt" dated "3/26/2013" with the text "test". At the bottom of the screen, there's a footer with the text "v2.0.700.0 © Mary Kay 2013".

You can also search using specific words in the notes, such as Timewise® or teacher.

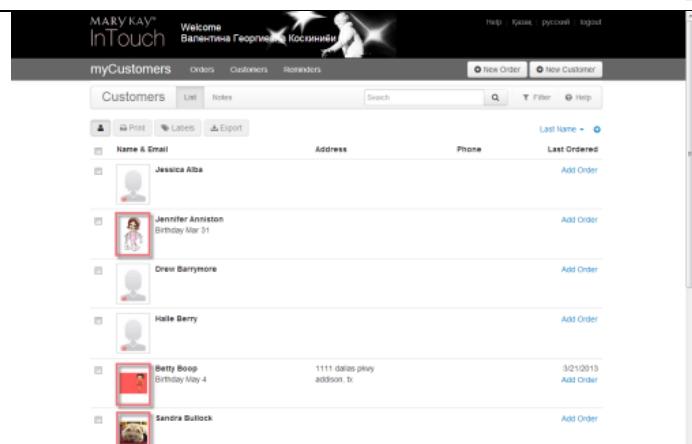
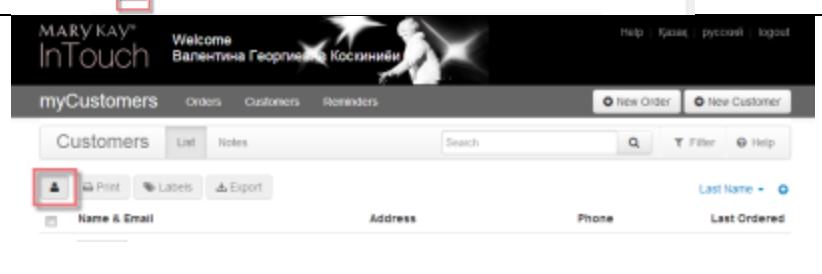
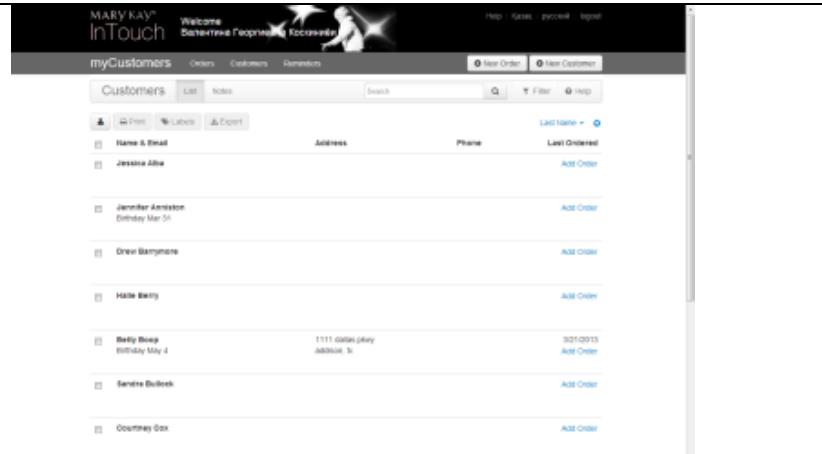
Type the word in the Search field. Press ENTER or select the magnifying glass.

For this example, I will use the word "teacher."

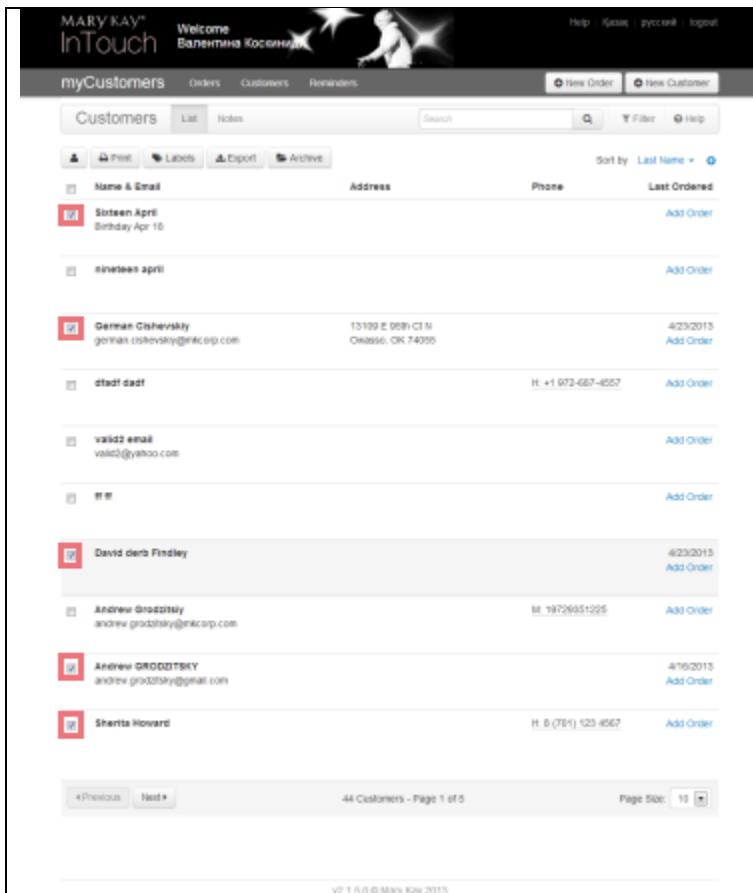
This screenshot shows the same Mary Kay InTouch interface as the previous one, but with a search result. The search field now contains "teacher". The results show two notes that contain the word "teacher": "Julia Roberts" on "3/19/2013" and "Charles Merritt" on "3/26/2013". Both of these notes are highlighted with a red rectangular box. The rest of the notes from the previous screenshot are no longer visible.

The search results are displayed.

How to View the Customer List With or Without Pictures

	<p>Pictures are displayed. If a customer does not have a picture uploaded then a gray profile is displayed as a placeholder for the picture.</p>
	<p>To return to just the list view, click the icon again.</p>
	<p>The Customer List displays without pictures.</p>

How to Print a List of Selected Customers

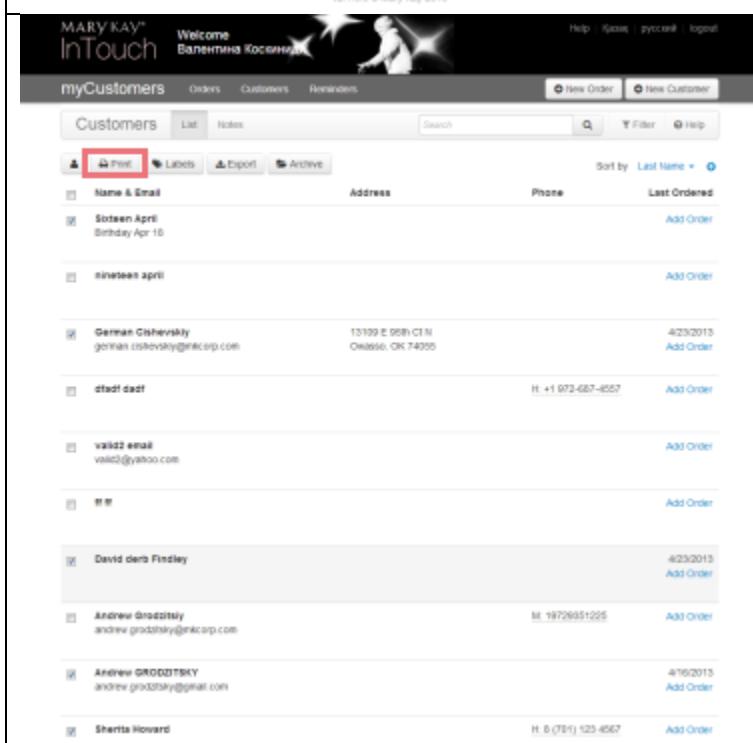


The screenshot shows the 'Customers' list page in the Mary Kay InTouch software. The page header includes the 'myCustomers' logo, 'Welcome' message, and navigation links for 'Orders', 'Customers', 'Reminders', 'New Order', and 'New Customer'. The main content area displays a table of 11 customer records. Each record includes a checkbox, a name, address, phone number, and a 'Last Ordered' date. The first customer, 'Sixteen April', has a checked checkbox next to their name. The 'Print' button in the top left of the table header is highlighted with a red box.

Print a list of selected customers from your Customer List.

To select customers one by one, click the **checkbox** beside each customer.

Selecting the checkbox also activates the **Print** button.



This screenshot is identical to the one above, showing the 'Customers' list page in the Mary Kay InTouch software. The 'Print' button in the top left of the table header is highlighted with a red box, indicating it is active due to the selected customer.

Click the Print button to create and print a list of the selected customers.

Business Reportage				Customer	Tuesday, April 23, 2013
Name	Phone Number	Address	Email		
Sidney April					
German Chechovskiy		11129 E. 95th -C N Olathe, KS 74025	german.chechovskiy@mkcorp.com		
David Findley					
Andrew GRODZITSKY			andrew.grodzitsky@gmail.com		
Sherita Howard	H: 8 (701) 231-4067				

Page 1 of 1

A list of all of your customers is created and displayed in a PDF format. The document can be saved or printed.

Use the save or print function in the PDF viewer to save or print the document.

How to Print a Complete Customer List

The screenshot shows the 'Customers' list page in the MARY KAY InTouch software. The 'Name & Email' column header is highlighted with a red box. The list includes various customer entries with columns for Name & Email, Address, Phone, and Last Ordered. At the bottom, there are navigation buttons for 'Previous' and 'Next', and a page size selector set to 10.

Use your Customer List to help you print a list of all of your customers.

To create a list and activate the **Print** button, click the **Select All checkbox** beside the column header, Name & Email.

The **checkbox** for each customer on all pages is checked automatically.

The screenshot shows the same customer list page as above, but the 'Print' button in the top toolbar is highlighted with a red box.

To print the list, click **Print**.

Name	Phone Numbers	Address	Email	Date
nineteen april				Tuesday, April 23, 2013
Sixteen April				
German Oshovsky	13109 E 95th Ct N	Oklahoma, OK 74055	german.oshovsky@mkcorp.com	
staff staff	H: +1 972-887-4557			
valid2 email			valid2@yahoo.com	
W.W.				
David Findley				
Andrew Grodotsky	C: 23729551225		andrew.grodotsky@mkcorp.com	
Andrew GRODOTSKY			andrew.grodotsky@gmail.com	
Sherrita Howard				
Sherrita Howard	H: 8 (781) 123-4567			

A list of all of your customers is created and displayed in a PDF format. The document can be saved or printed.

Use the save or print function in the PDF viewer to save or print the document.

How to Print a Filtered Customer List

The screenshot shows the 'Customers' list page in the MARY KAY InTouch software. A red box highlights the 'Filter' button in the top right corner of the search bar. A dropdown menu is open, showing categories: Date Added, Last Order Date, Name, Ordered, Anniversary, Arrived, and Advanced. The 'Birthday' option is highlighted with a blue box.

Use the Customer List to help you print a customer list created using the filter.

Click **Filter** and select the **category** from the drop-down menu.

For this example we will use **Birthday**.

The screenshot shows the 'Customers' list page with the 'Filter' button selected. A red box highlights the 'Birthday' input field, which contains the placeholder text '-Select-'.

The Birthday selection field displays.

Click the **arrow** to view the drop-down menu. For this example we will select the month of March.

The screenshot shows the 'Customers' list page with the 'Filter' button selected and the 'Birthday' field set to 'March'. A red box highlights the 'March' option in the dropdown menu. The list below shows two customers with March birthdays: Charles Kevin Merritt and Jake Roberts.

Name & Email	Address	Phone	Last Ordered
Charles Kevin Merritt kevin.merritt@mkcorp.com Birthday Mar 7 Anniversary Jul 28	10017 Bellfort Dr Friendswood, Tx 77593	M: 28185374446	8/16/2013 Add Order
Jake Roberts jake.mwag@yahoo.com Birthday Mar 4	15201 N Dallas Tollway Santa Fe, NM 87501	M: 1234567891	8/18/2015 Add Order

A list of customers with March birthdays is displayed.

The screenshot shows the MARY KAY InTouch software interface. At the top, there's a banner with the company logo and a welcome message. Below it, a navigation bar includes links for myCustomers, Orders, Customers, Reminders, and buttons for New Order and New Customer. The main area is titled 'Customers' and shows a list of 2 customers with March birthdays. The columns include Name & Email, Address, Phone, and Last Ordered. A 'Print' button is highlighted with a red box in the top right corner of the list area.

Name & Email	Address	Phone	Last Ordered
Charles Kevin Merritt kevin.merritt@mkcorp.com Birthday Mar 7 Anniversary Jul 28	10017 Bellfort Dr. Frisco, TX 75035	M. 2145374446	4/16/2015 Add Order
Julia Roberts jou.rhoad@yahoo.com Birthday Mar 4	15201 N. Dallas Tollway Santa Fe, NM 87501	M. 1234567891	4/16/2015 Add Order

At the bottom, there are buttons for Previous and Next, a page number (2 Customers - Page 1 of 1), and a page size selector (18).

To print the complete list and activate the **Print** button, click the **Select All checkbox** beside the Name & Email column header.

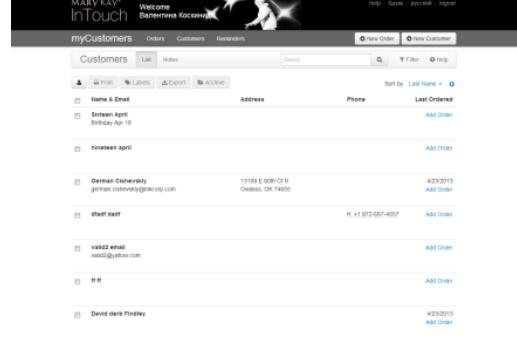
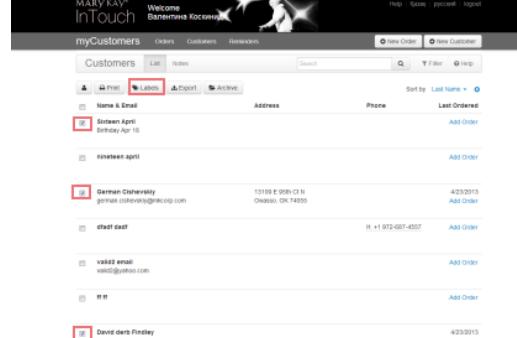
Click Print.

BIRTHDAY REMINDER			
Customer		Date	Comments
Charles Merritt	C: 2145374446	10017 Bellfort Dr. Frisco, TX 75035	kevin.merritt@mkcorp.com
Julia Roberts	C: 1234567891	15201 N. Dallas Tollway Santa Fe, NM 87501	jou.rhoad@yahoo.com

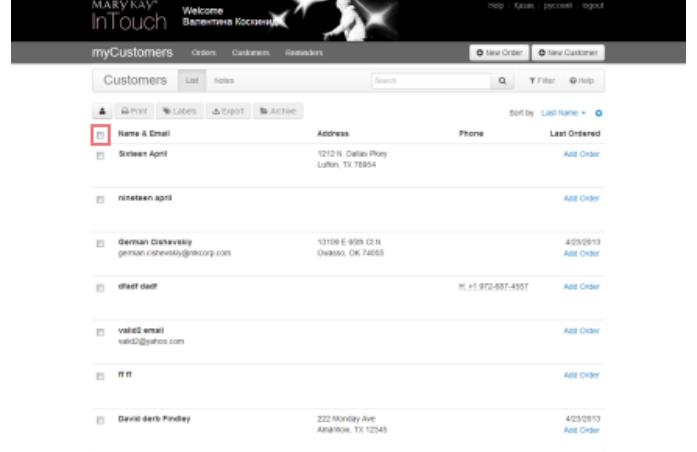
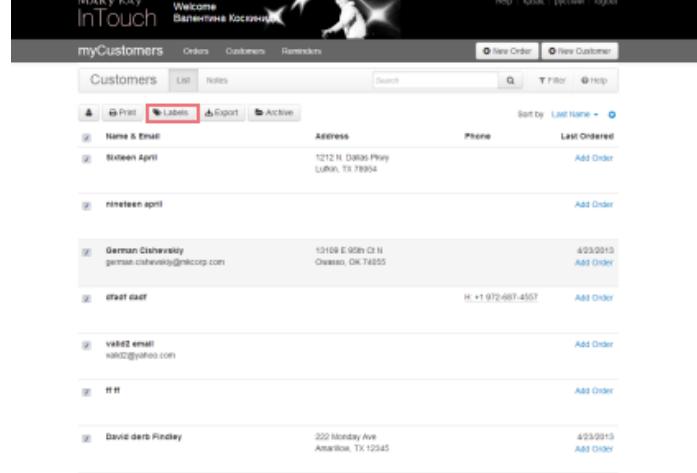
A list of your customers with March birthdays is created and displayed in a PDF format. The document can be saved or printed.

Use the save or print function in the PDF viewer to save or print the document.

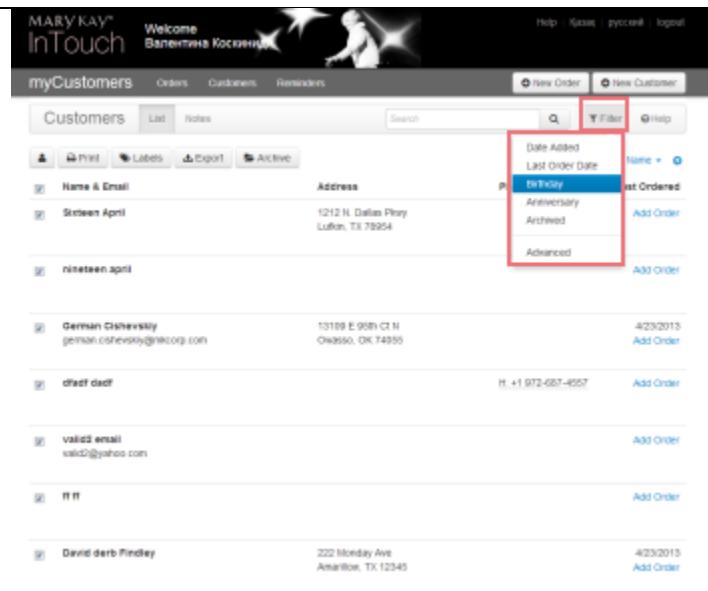
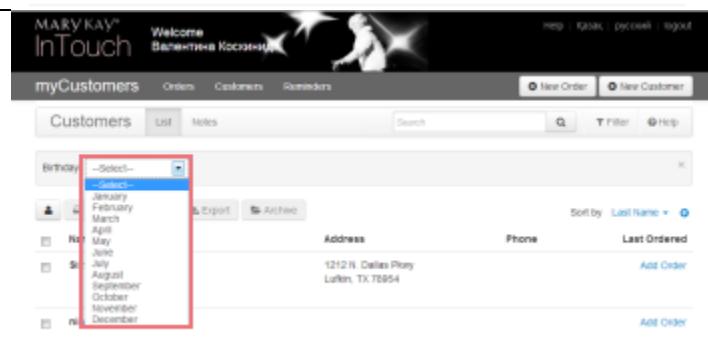
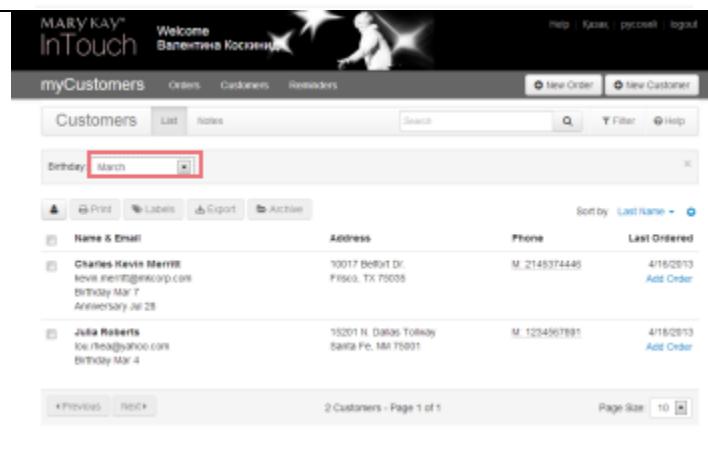
How to Create Labels Using Selected Customers

	<p>Use the customer list to help you create a file to use for printing labels. Labels can be created for individual customers, all customers or groups of customers.</p> <p>If you wish to create labels for individual customers, select just the customers you for whom you need labels.</p> <p>Open Customers.</p> <p>The customer list is displayed.</p>
	<p>To select customers one by one, click the checkbox beside each customer.</p> <p>Selecting the checkbox also activates the Labels button.</p> <p>To create the label file, click Labels</p>
Sixteen April 1212 N. Dallas Pkwy Lufkin, TX 75904	German Cishevskiy 13109 E 95th Ct N Owasso, OK 74055

How to Create Labels for All Customers

	<p>Use the Customer List to help you to create a file of all of your customers that you can use to print label.</p> <p>To begin, click the Select All checkbox beside the column header, Name & Email.</p>
	<p>The checkbox for each customer on all pages is checked automatically and the Labels button is activated.</p>
	<p>A PDF document you can save and use to print labels is created.</p> <p>The layout of the file, 30 labels per page, corresponds to Avery 5160 Labels.</p>

How to Create Labels from a Filtered Customer List

 <p>The screenshot shows the Mary Kay InTouch customer list interface. A red box highlights the 'T Filter' button, which is currently active, showing a dropdown menu. The 'Birthday' option is highlighted in blue and selected.</p>	<p>Use the Customer List to help you create a file to use for labels from a customer list that was created using the filter.</p> <p>To begin, click the filter and select the category from the drop-down menu.</p> <p>For this example we will use Birthday.</p>
 <p>The screenshot shows the same customer list interface after selecting 'Birthday'. A red box highlights the dropdown menu for 'Birthday', which now shows 'March' selected.</p>	<p>The Birthday selection field displays.</p> <p>Click the arrow to view the drop-down menu.</p> <p>For this example we will select the month of March.</p>
 <p>The screenshot shows the final result of the filter application. A red box highlights the 'Birthday' input field, which now contains 'March'. The customer list below shows two entries: Kevin Maffie and Julia Roberts, both of whom have March birthdays.</p>	<p>A list of customers with March birthdays is displayed.</p>

The screenshot shows the MARY KAY InTouch software interface. At the top, there's a banner with the brand name and a welcome message in Russian. Below the banner, the main menu includes 'myCustomers', 'Orders', 'Customers', and 'Reminders'. On the right side of the header, there are links for 'Help', 'Logout', and 'Logout'. The main content area is titled 'Customers' and shows a list of two customers: Charles Kevin Merritt and Julia Roberts. Each customer entry includes their name, email, address, phone number, and last order date. The 'Labels' button in the toolbar is highlighted with a red box. The bottom of the screen shows pagination controls and a page size selector.

Name & Email	Address	Phone	Last Ordered
Charles Kevin Merritt kevin.merritt@mkcorp.com Birthday Mar 7 Anniversary Jul 18	10017 Bellfort Dr. Frisco, TX 75035	M. 2145374486	4/16/2013 Add Order
Julia Roberts julia.roberts@juno.com Birthday Mar 4	15201 N. Dallas Tollway Santa Fe, NM 75001	M. 1234567891	4/18/2013 Add Order

To print the complete list and activate the **Labels** button, click the **Select All checkbox** beside the Name & Email column header.

To create the label file, click the **LABELS** button.

Charles Merritt
10017 Bellfort Dr.
Frisco, TX 75035

Julia Roberts
15201 N. Dallas Tollway
Santa Fe, NM 75001

A PDF document you can save and use to print labels is created.

How to Export Selected Customers to an Excel Spreadsheet

The screenshot shows the 'Customers' list in the Mary Kay InTouch software. The 'Export' button is highlighted with a red box. The list includes columns for Name & Email, Address, Phone, and Last Ordered.

Name & Email	Address	Phone	Last Ordered
Sixteen April	1212 N. Dallas Pkwy Lufkin, TX 75954		Add Order
nineteen april			Add Order
German Cishevskiy german.cishevskiy@mkccog.com	13108 E 90th Ct N Oklahoma, OK 74655	+1 972-587-4957	4/24/2013 Add Order
etadt east			Add Order
valid2 email valid2@yahoo.com			Add Order
tt tt			Add Order
David derb Pindley	222 Monday Ave. Amarillo, TX 12345		4/23/2013 Add Order
Andrew Gredotskiy	M-1972916/1225		Add Order

Use the Customer List to create a list in Excel of just the customers you want to have in the spreadsheet.

Open Customers.

The customer list is displayed.

The screenshot shows the 'Customers' list in the Mary Kay InTouch software. Several checkboxes next to customer names are checked, and the 'Export' button is highlighted with a red box.

Name & Email	Address	Phone	Last Ordered
Sixteen April	1212 N. Dallas Pkwy Lufkin, TX 75954		Add Order
nineteen april			Add Order
German Cishevskiy german.cishevskiy@mkccog.com	13108 E 90th Ct N Oklahoma, OK 74655	+1 972-587-4957	4/24/2013 Add Order
etadt east			Add Order
valid2 email valid2@yahoo.com			Add Order
tt tt			Add Order
David derb Pindley	222 Monday Ave. Amarillo, TX 12345		4/23/2013 Add Order

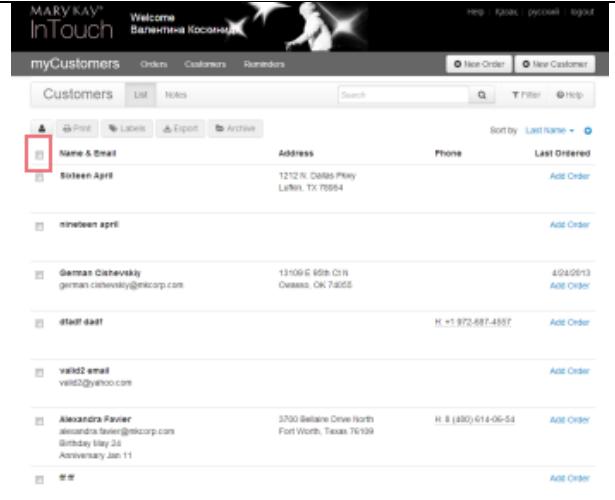
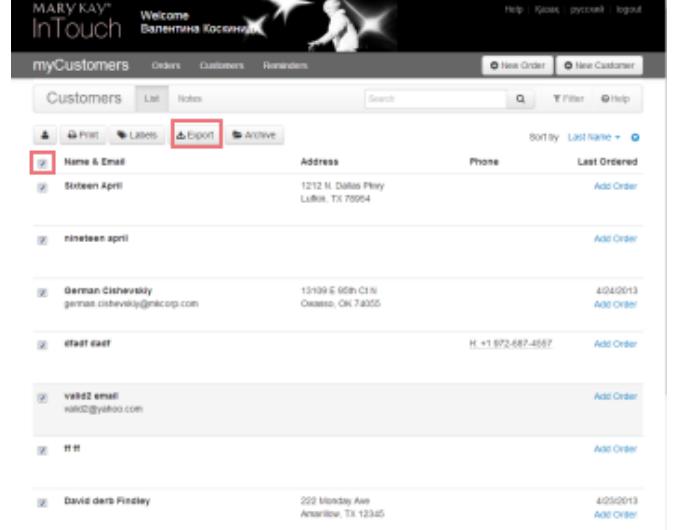
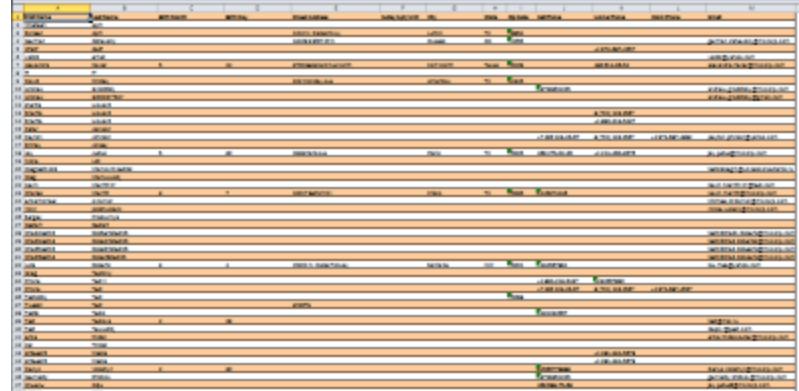
To select customers one by one, click the **checkbox** beside each customer.

Selecting the checkbox activates the **Export** button.

To create the label file, click **Export**.

An list of the customers you selected is exported to Excel and is available for you to use.

How to Export All Customers to an Excel Spreadsheet

	<p>Use the Customer List to create a customer list in Excel of all of your customers.</p> <p>To begin, click the Select All checkbox beside the column header, Name & Email.</p>
	<p>The checkbox for each customer on all pages is checked automatically and the Export button is activated.</p>
	<p>A complete list of your customers is exported to an Excel document and available for you to save and use.</p>

How to Export a Filtered List of Customers to an Excel Spreadsheet

This screenshot shows the 'Customers' list page in the Mary Kay InTouch software. At the top right, there is a 'Filter' button with a magnifying glass icon. A dropdown menu is open, showing several filter categories: Date Added, Last Order Date, Name, Birthday, Anniversary, Archived, and Advanced. The 'Birthday' option is highlighted with a blue background.

Use the Customer List to create a list of customers in an Excel spreadsheet from a customer list created using the filter.

To begin, click the filter and select the **category** from the drop-down menu.

For this example we will use **Birthday**.

This screenshot shows the same customer list page as the previous one, but with the 'Birthday' filter selected. The dropdown menu is open, and 'March' is highlighted with a red box. Other months listed include January, February, April, May, June, July, August, September, October, November, December, and All.

The Birthday selection field displays.

Click the **arrow** to view the drop-down menu.

For this example we will select the month of March.

This screenshot shows the customer list page with the 'March' filter applied. The dropdown menu is closed, and 'March' is selected. The list of customers now only includes those born in March.

A list of customers with March birthdays is displayed.

The screenshot shows the MARY KAY InTouch software interface. At the top, it says "MARY KAY® InTouch" and "Welcome Валентина Косинова". There are links for "Help", "Logout", "myCustomer", "Orders", "Customers", "Rewards", "New Order", "New Customer", and "Logout". Below this is a search bar with "Search" and "Filter" buttons. A dropdown menu shows "Birthday" and "MARCH". Underneath is a toolbar with icons for "Print", "Labels", "Export" (which is highlighted with a red box), and "Archive". A checkbox labeled "Name & Email" is also highlighted with a red box. The main area displays a table of customers with columns: "Name & Email", "Address", "Phone", and "Last Ordered". Two entries are shown:

Name & Email	Address	Phone	Last Ordered
Charles Kevin Merritt kevin.merrill@mkcorp.com Birthday Mar 7 Anniversary Jul 25	10017 Bellfort Dr. Plano, TX 75035	M. 2145374446	4/10/2013 Add Order
Juli Roberts juli.roberts@yahoo.com Birthday Mar 4	15291 N. Dallas Tollway Santa Fe, NM 79001	M. 1234567891	4/10/2013 Add Order

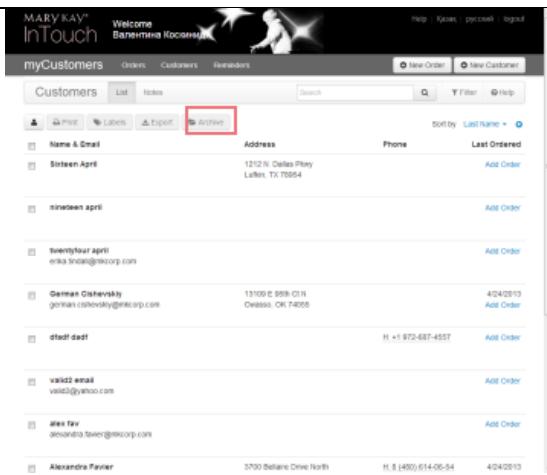
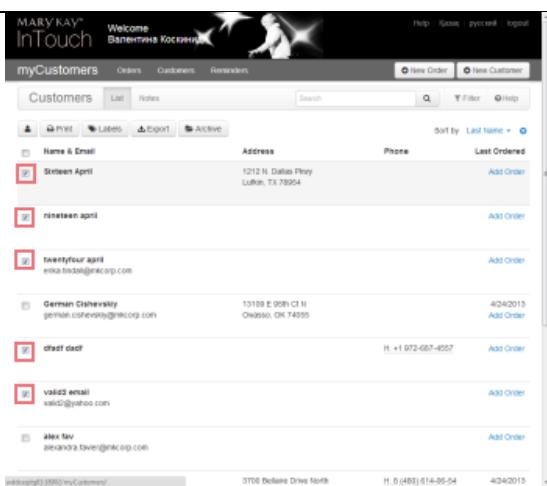
At the bottom, there are "Previous" and "Next" buttons, a page count "2 Customers - Page 1 of 1", and a "Page Size" dropdown set to 10.

To print the complete list and activate the **Export** button, click the **Select All checkbox** beside the Name & Email column header.

To create the label file, click the **LABELS** button.

The filtered customer list is exported to an Excel document and is now available for you to save and use.

How to Select and Archive Customers

	<p>Periodically you may want to review your customer list and remove anyone who has not ordered in a year or more or remove a customer for another reason. Use Archive to store customer information away without removing it completely. Then when the customer orders again you may not have to re-enter all of their information. Instead, you can re-activate them easily from the Archived Customer List.</p> <p>To begin, click Customers.</p> <p>The customer list is displayed.</p>
	<p>To select customers one by one, click the checkbox beside each customer.</p> <p>Selecting the checkbox activates the Archive button.</p> <p>To remove the customers from the Active Customer List and move them to the Archived Customer List, click Archive.</p>
	<p>A confirmation screen displays to confirm you do want to remove the selected customers from the active customer list and move them to the Archived Customer List.</p> <p>Click Ok to continue and move the customer. Click Cancel if you do not want to move the customer.</p>

The screenshot shows the 'Customers' list in the MARY KAY InTouch software. The customer 'Sister April' has a red checkmark next to her name. Other customers listed are nineteen.april, twentyfour.april, German.Chehevsky, dmitr.dmitr, valeri.enshi, and alex.taver. The interface includes tabs for Customers, Orders, Customers, Reminders, and buttons for New Order and New Customer.

The checkmarks are cleared from the checkboxes but the names are still on the Active Customer List.

Before the changes will be visible, you will need to leave the Customer List and go to another page or click the Refresh icon located at the top of the browser.

The screenshot shows the 'Customers' list in the MARY KAY InTouch software after changes. The customer 'Sister April' no longer has a red checkmark next to her name. Other customers listed are nineteen.april, twentyfour.april, German.Chehevsky, dmitr.dmitr, valeri.enshi, and alex.taver. The interface includes tabs for Customers, Orders, Customers, Reminders, and buttons for New Order and New Customer.

Once the page has been refreshed by leaving or using the Refresh icon, the selected customers are no longer displayed on the Active Customer List.

How to View the Archived Customer List

This screenshot shows the 'Customers' list in the Mary Kay InTouch software. At the top right, there is a 'Filter' button with a dropdown menu open. The 'Archived' option is highlighted with a red box. Other options in the dropdown include 'Data Added', 'Last Order Date', 'Birthday', 'Anniversary', and 'Last Ordered'. The main list displays several customer entries, each with a checkbox, name, address, phone number, and 'Add Order' link.

Use the **Filter** to view your customers who are on the **Archived Customer List**.

Click **Filter**. A drop-down menu displays.

From the drop-down menu, select **Archived**.

This screenshot shows the same customer list as the previous one, but with a red box highlighting the 'Archived' checkbox in the search bar. This indicates that the user has selected the 'Archived' filter.

The **Archived Bar** displays.

To view the **Archived Customer List**, click the checkbox beside **Archived**.

This screenshot shows the customer list with the 'Archived' filter applied. A red box highlights the 'Archived' checkbox in the search bar. Another red box highlights the 'X' button in the 'Archived' bar at the top of the list area, which is used to close the filter.

The list immediately changes and displays the **Archived Customer List**.

To return to the **Active Customer List**, click the **checkbox** beside **Archived** to remove the checkmark or click the “**X**” to close the **Archived Bar**.

The screenshot shows the MARY KAY® InTouch software interface. At the top, there's a banner with the text "MARY KAY® InTouch" and "Welcome Beatehna Kochan". Below the banner, the main menu includes "myCustomers", "Orders", "Customers", "Reminders", "Help", "Logout", "New Order", and "New Customer". The main content area is titled "Customers" with tabs for "List" and "Notes". A search bar with a magnifying glass icon and a filter button are also present. A red box highlights the "Archived" button in the toolbar. The table below lists three customers: German Oshavskiy, alex fav, and Alexandra Favier. Each customer entry includes a checkbox for "Name & Email", "Address", "Phone", and "Last Ordered", along with a "Add Order" link.

Name & Email	Address	Phone	Last Ordered
German Oshavskiy german.oshevskiy@mkcorp.com	13108 E 25th Ct N Oklahoma City, OK 74605		4/24/2013 Add Order
alex fav alexandra.favier@mkcorp.com			Add Order
Alexandra Favier alexandra.favier2@mkcorp.com Birthday May 24 Anniversary Jan 11	3700 Belaire Drive North Fort Worth, Texas 76109	H. S (480) 614-06-54	4/24/2013 Add Order

The **Active Customer List** is displayed.

To remove the **Archived Bar**, click the “X”.

How to Move a Customer from the Archived Customer List to the Active Customer List

This screenshot shows the 'Customers' list in the MARY KAY InTouch software. A red box highlights the 'Filter' button in the top right corner of the search bar. A dropdown menu is open, and another red box highlights the 'Archived' option under the 'Data Added' section.

Name & Email	Address	Phone	Last Ordered
German Cishevskiy german.cishevskiy@mkcorp.com	10108 E 95th Ct N Oklahoma City, OK 74855	(405) 233-1234	4/24/2013 Add Order
alex.fav alexandra.favien@mkcorp.com			Add Order
Alexandra Favier alexandra.Favier2@mkcorp.com	3700 Relaine Drive North Fort Worth, Texas 76109	H: (817) 614-06-04	4/24/2013 Add Order
David Barb Findley	222 Monday Ave Amarillo, TX 79105		4/23/2013 Add Order
Andrew Grodzinsky andrew.grodzinsky@mkcorp.com		M: 19720585225	Add Order

It is easy to move a customer from the **Archived Customer List** to the **Active Customer List**.

First open the Archived Customer List. To do this, click **Filter**. A drop-down menu displays.

From the drop-down menu, select **Archived**.

This screenshot shows the 'Customers' list with the 'Archived' checkbox selected in the filter bar. A red box highlights the 'Archived' checkbox. The list below shows only the customer 'German Cishevskiy' because he is the only one marked as archived.

Name & Email	Address	Phone	Last Ordered
German Cishevskiy german.cishevskiy@mkcorp.com	10108 E 95th Ct N Oklahoma City, OK 74855	(405) 233-1234	4/24/2013 Add Order

The **Archived Bar** displays.

To view the **Archived Customer List**, click the checkbox beside **Archived**.

This screenshot shows the 'Customers' list with the 'Archived' checkbox selected in the filter bar. A red box highlights the 'Archived' checkbox. The list now displays all five customers: German Cishevskiy, Alexandra Favier, David Barb Findley, Andrew Grodzinsky, and Stacie April.

Name & Email	Address	Phone	Last Ordered
German Cishevskiy german.cishevskiy@mkcorp.com	10108 E 95th Ct N Oklahoma City, OK 74855	(405) 233-1234	4/24/2013 Add Order
alex.fav alexandra.favien@mkcorp.com			Add Order
Alexandra Favier alexandra.Favier2@mkcorp.com	3700 Relaine Drive North Fort Worth, Texas 76109	H: (817) 614-06-04	4/24/2013 Add Order
David Barb Findley	222 Monday Ave Amarillo, TX 79105		4/23/2013 Add Order
Andrew Grodzinsky andrew.grodzinsky@mkcorp.com		M: 19720585225	Add Order
Stacie April stacie.april@mkcorp.com	1212 N. Dallas Pkwy Dallas, TX 75205	H: +1 972-687-4557	Add Order
nineteen.april erika.fordall@mkcorp.com			Add Order
twentyfour.april erika.fordall@mkcorp.com			Add Order
erika.fordall@mkcorp.com			Add Order

The list immediately changes and displays the **Archived Customer List**.

Customers List Notes Search Filter Help

Sort by: Last Name ▾

Name & Email	Address	Phone	Last Ordered
Sixteen April Birthday April 16	1212 N. Dallas Pkwy Lafkin, TX 77654		Add Order
nineteen.april			Add Order
twentyfour.april			Add Order

To move a customer to the **Active Customer List**, click the **checkbox** next to the customer's name.

Click **Unarchive**.

Are you sure you want to unarchive the selected customers?

OK Cancel

A **Confirmation** screen displays to confirm you do want to remove the customer from the **Archived Customer List**.

Click **Ok** to continue and move the customer. Click **Cancel** if you do not want to move the customer.

Archived

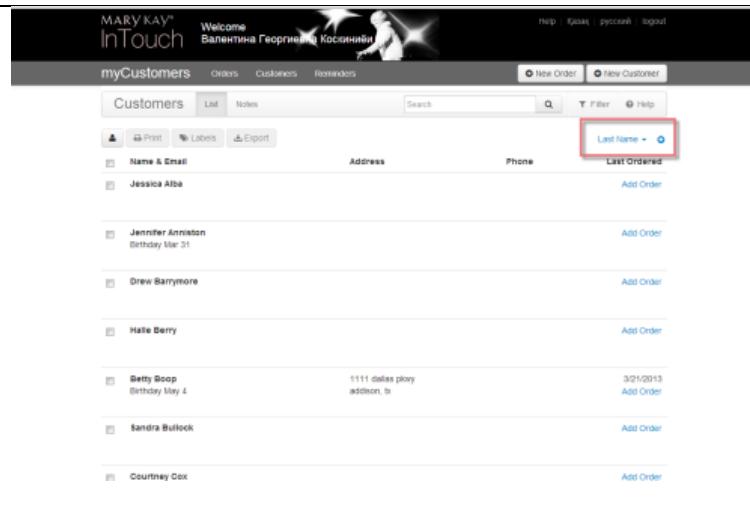
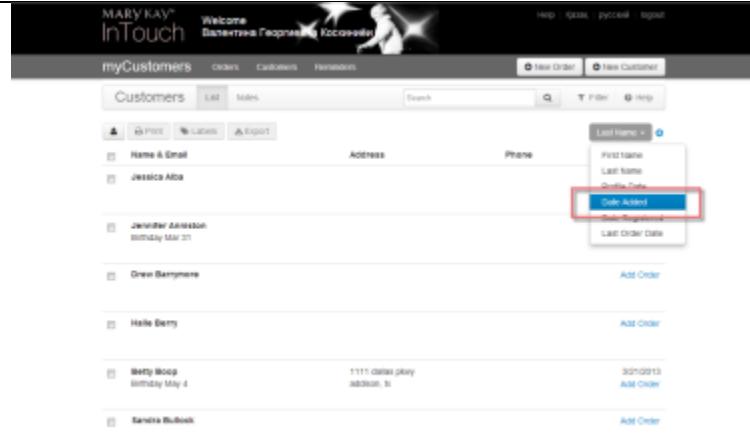
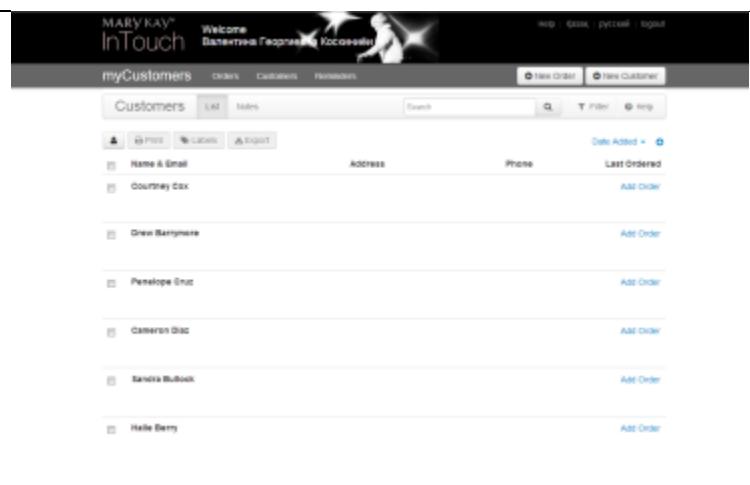
Sort by: Last Name ▾

Name & Email	Address	Phone	Last Ordered
Sixteen April	1212 N. Dallas Pkwy Lafkin, TX 77654		Add Order
German Gishevskiy german.gishevskiy@mkcorp.com	13109 E 95th St N Oklahoma, OK 74655	4/24/2013	Add Order
alex.fav			Add Order

To return to the **Active Customer List**, and see the change click the **checkbox** beside **Archived** to remove the checkmark or click the "X" to close the **Archived Bar**.

The customer is now displayed on the **Active Customer List**.

How to Sort the Customer List

 <p>The screenshot shows the 'Customers' list page. At the top right, there is a dropdown menu labeled 'Last Name'. A red box highlights this dropdown. Below it, a sub-menu is open with options: First Name, Last Name, Profile Date, Date Added, and Last Order Date. The 'Date Added' option is highlighted with a blue box.</p>	<p>By default the customer list is sorted by the customer's last name.</p> <p>You can change it to sort by, First Name Profile Date Date Added Last Order Date</p> <p>Click Last Name in the upper right-hand corner.</p>
 <p>The screenshot shows the same list page after selecting 'Date Added' from the dropdown. The sub-menu is still open, but 'Date Added' is now the active option, indicated by a blue box.</p>	<p>A drop-down menu displays.</p> <p>Select the sort category. For this example, we will use Date Added.</p>
 <p>The screenshot shows the final result of sorting by 'Date Added'. The list is now ordered from most recent addition at the top to oldest at the bottom. Courtney Cox is at the top, followed by Penelope Cruz, Cameron Diaz, Sandra Bullock, Halle Berry, Drew Barrymore, Jennifer Aniston, Betty Boop, Jessica Alba, and最后是Helen Hunt at the bottom.</p>	<p>The list is automatically sorted with the customer who was added most recently listed first.</p>

How to View a Customer's Profile Page

The screenshot shows the 'Customers' tab selected in the navigation bar. A red box highlights the entry for 'Jennifer Anniston' with the note 'Birthday Mar 31'. Other entries include 'Betty Boop' (Birthday May 4), 'cv cv' (Birthday Mar 27), 'g d' (no birthday listed), 'd d' (no birthday listed), and 'Denis DateTest' (Birthday Mar 15, Anniversary Dec 30). Each entry has a 'Last Ordered' column showing 'Add Order'.

From the **Customer List** you can open the customer's **Profile Page** by clicking the line for the customer's name.

The screenshot shows the 'Notes' tab selected in the navigation bar for Jennifer Anniston. The profile includes a placeholder photo, the name 'Jennifer Anniston', and a text area for notes with the placeholder 'Add a note about Jennifer' and a 'Add this note' button. To the right, there are links for 'Add Order', 'Edit customer', and 'New Virtual Makeover'. Under 'REMINDERS', there is a list with three items: 'Birthday Celebration' (checked), 'q' (unchecked), and 'new reminder' (unchecked). There is also an 'Add Reminder' link. At the bottom, it says 'Customer since: 3/20/2013'.

The customer's **Profile Page** displays defaulting to the **Notes** tab.

How to Open a Customer's Order

MARY KAY® InTouch Welcome Business Responds! Kosherella myCustomers Orders Customers Reminders Help Print Labels Export Search Filter Help New Order New Customer Customers List Notes

Name & Email Address Phone Last Ordered Add Order

Jessica Alba

Jennifer Aniston Birthday Mar 21 Add Order

Drew Barrymore Add Order

Halle Berry Add Order

Betty Boop Birthday May 4 1111 Dallas Pkwy Addison, Tx 3/21/2013 Add Order

← Previous Next → 77 Customers - Page 1 of 10 Page Size 5 10

To create an order from the Customer List, locate the customer. If the customer is not on the first page, use Search to quickly find the customer.

MARY KAY® InTouch Welcome Business Responds! Kosherella myCustomers Orders Customers Reminders Help Print Labels Export Search Filter Help New Order New Customer Customers List Notes

Name & Email Address Phone Last Ordered Add Order

Jessica Alba

Jennifer Aniston Birthday Mar 21 Add Order

Drew Barrymore Add Order

Halle Berry Add Order

Betty Boop Birthday May 4 1111 Dallas Pkwy Addison, Tx 3/21/2013 Add Order

← Previous Next → 77 Customers - Page 1 of 10 Page Size 5 10

Click Add Order

MARY KAY® InTouch Welcome Business Responds! Kosherella myCustomers Orders Customers Reminders Help Print Labels Export Search Filter Help New Order New Customer Customers List Notes

New Sales Ticket

Order Date: 3/30/2013 Order Status: Pending

Products

All Previously Ordered Recommended Wish List

Search All

Part #	Name	Suggested Retail
A00000808	Teal 0008	T\$-69
A02408	Mary Kay® Concealer Beige 1	T\$0-00
A033	Color Gels - Chocolates, pk./1	T\$0-30
A11629	Mary Kay® Facial Highlighting Pen shade 2	T\$0-00
A10840	Mary Kay® Mineral Eye Color Vintage Gold	T\$-50

← Previous Next → 622 Products - Page 1 of 10

The order contains no products.

The New Sales Ticket page is displayed.

You are ready to start entering her order.

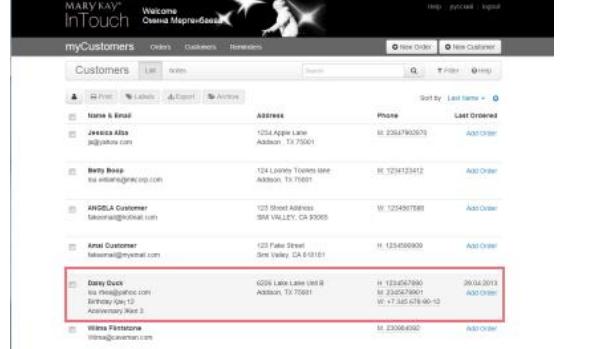
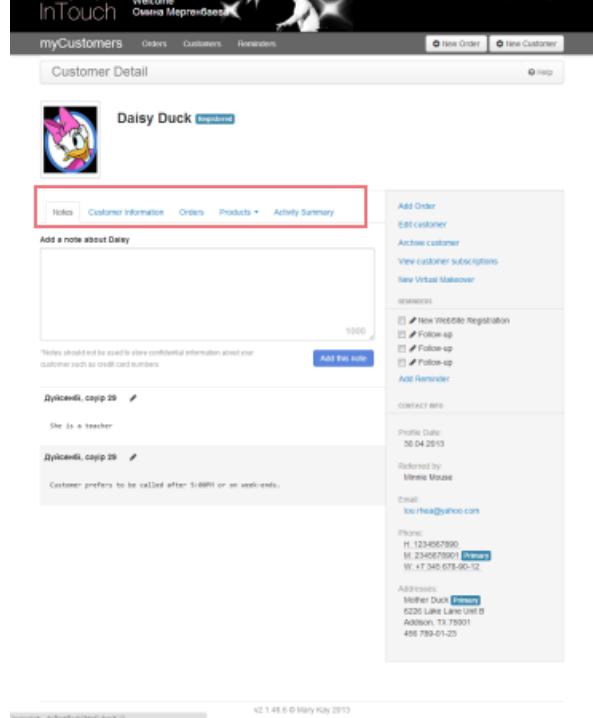
Customer Profile Page

The screenshot shows the Mary Kay InTouch software interface. At the top, there's a navigation bar with links for 'myCustomers', 'Orders', 'Customers', 'Reminders', 'Help', 'Logout', and 'Logout'. Below the navigation is a header for 'Daisy Duck' with a small profile picture. The main content area is titled 'Customer Detail' and shows a summary of customer information. It includes tabs for 'Notes', 'Customer Information', 'Orders', 'Products', and 'Activity Summary'. A note section allows adding notes about the customer. On the right side, there's a sidebar with options like 'Add Order', 'Edit Customer', 'Archive customer', 'View customer sub-profiles', 'New Virtual Makeover', and 'Addresses'. Below the sidebar, there's a contact info section with fields for 'Profile Date' (04/04/2013), 'Preferred by' (Minnie Mouse), 'Email' (michelle@yahoo.com), and 'Phone' (H: 1234567890, M: 234567890, O: 123-456-7890). At the bottom of the page, there's a footer with the URL 'http://www.marykay.com/lnk/lnk.asp?lnk=1&id=1000' and the copyright notice '©2013 Mary Kay Inc. All rights reserved.'

The customer's **Profile Page** is where you can,

- [View your customer's profile information](#)
- [Edit a customer's address, phone or email](#)
- [Add customer notes](#)
- [Edit customer notes](#)
- [Delete customer notes](#)
- [View your customer's contact preferences and profile](#)
- [Edit the information on the Customer Information tab](#)
- [View and open a customer's orders](#)
- [View the products a customer has previously ordered](#)
- [View products recommended for a customer](#)
- [View products on a customer's Wishlist](#)
- [View all of your interactions with a customer](#)
- [Create an order for a customer](#)
- [Archive or unarchive a customer](#)
- [View her subscriptions](#)
- [Upload a customer's photo to the Virtual Makeover](#)
- [Create a reminder for a customer](#)
- [Edit a reminder](#)
- [Delete a reminder](#)

How to View the Customer's Profile Page

	<p>To open the customer's Profile Page, click Customers.</p> <p>Click the line of a customer on the Customer List.</p> <p><i>Tip!</i> You can click anywhere on the line to open the customer's Profile Page.</p>
	<p>The customer's Profile Page opens.</p> <p>“Registered” will appear by the customer's name if she has registered on your Personal Website.</p> <p>Below her name are various tabs, Notes – a place you can record things you want to remember concerning products your customer uses, notes about her family etc.</p> <p>Customer Information – Contains contact, social media and profile information added from the Add A Customer page or from her MyMK profile page on your Personal Web site.</p> <p>Orders – A list of her online orders or orders created using myCustomers that you can open and view.</p> <p>Products – There are 3 sections,</p> <ul style="list-style-type: none"> • Previously ordered – a list of the products this customer has ordered in the past • Recommended – an automated list of product recommendations based on her answers to the Profile questions from the Add A Customer page or from her MyMK profile page. • Wishlist – A list of products she wants in the future. • Activity Summary - A list of the interactions you have had with this customer.

How to Change a Customer's Contact Information

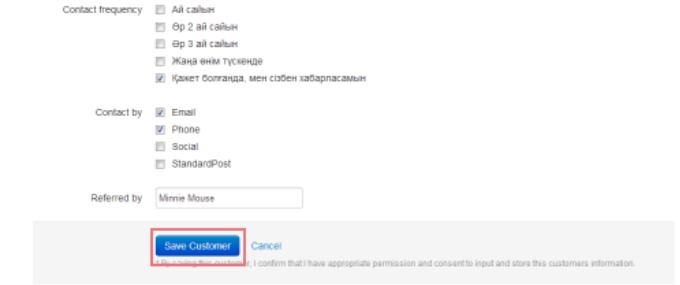
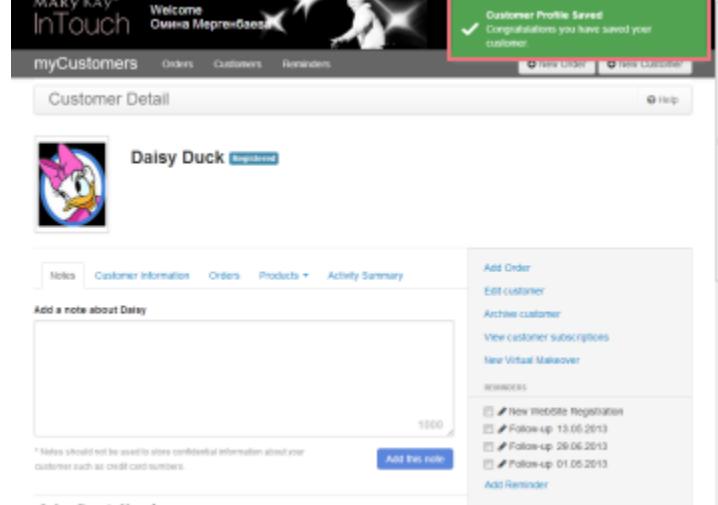
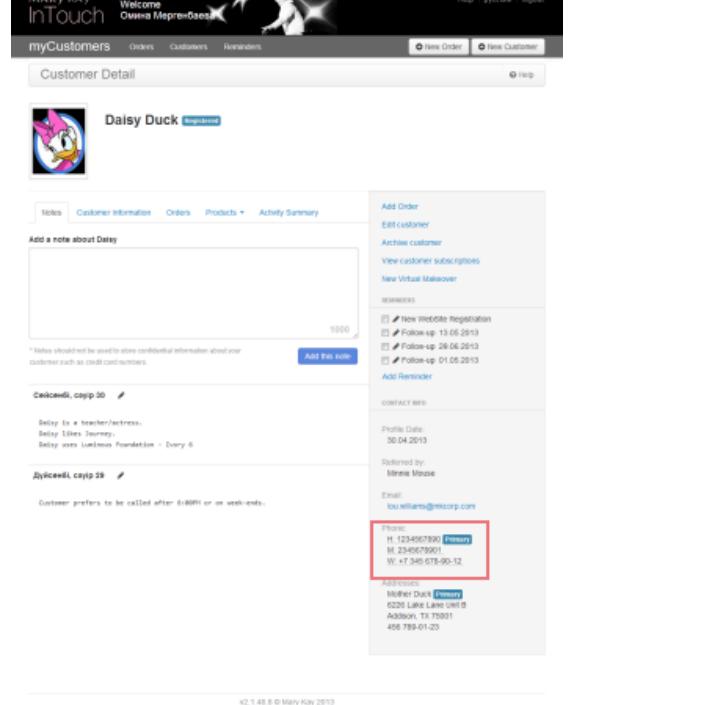
To make address, phone, email or other changes to the customer's personal information on the **Profile Page**, click the **Edit Customer** link.

The **Edit Customer** page displayed.

For this example, we will change the primary phone number from the second phone number to the first number listed.

To make another number the primary number, click the **Make Primary** link beside the new primary number.

The first number listed is now the primary phone number.

 <p>Contact frequency: <input type="checkbox"/> All calls <input type="checkbox"/> 2nd 2nd calls <input type="checkbox"/> 3rd 3rd calls <input type="checkbox"/> Жаңа еним түсінеді <input checked="" type="checkbox"/> Қажет болғанда, мен сабен хабарласамын</p> <p>Contact by: <input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> Phone <input type="checkbox"/> Social <input type="checkbox"/> StandardPost</p> <p>Referred by: Minnie Mouse</p> <p>Save Customer Cancel</p> <p>I confirm that I have appropriate permission and consent to input and store this customers information.</p>	<p>To save the changes, scroll down to the bottom of the screen and click the Save Changes button.</p> <p>To return to the Profile Page and not save the changes, click Cancel.</p>
 <p>MARY KAY® InTouch Welcome Омми Мергендәс myCustomers Orders Customers Reminders Customer Detail Daisy Duck Registered</p> <p>Add a note about Daisy</p> <p>Note: Customer Information Orders Products Activity Summary</p> <p>Add Order Edit customer Archive customer View customer subscriptions New Virtual Makeover</p> <p>REMINDERS</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> New Website Registration <input checked="" type="checkbox"/> Follow up: 13.06.2013 <input checked="" type="checkbox"/> Follow up: 26.06.2013 <input checked="" type="checkbox"/> Follow up: 01.05.2013 <p>Add Reminder</p> <p>* Notes should not be used to store confidential information about your customer such as credit card numbers.</p> <p>Add this note</p> <p>Customer Detail</p> <p>Daisy Duck Registered</p> <p>Notes Customer Information Orders Products Activity Summary</p> <p>Add a note about Daisy</p> <p>Note: Customer Information Orders Products Activity Summary</p> <p>Add Order Edit customer Archive customer View customer subscriptions New Virtual Makeover</p> <p>REMINDERS</p> <ul style="list-style-type: none"> <input type="checkbox"/> New Website Registration <input type="checkbox"/> Follow up: 13.06.2013 <input type="checkbox"/> Follow up: 26.06.2013 <input type="checkbox"/> Follow up: 01.05.2013 <p>Add Reminder</p> <p>* Notes should not be used to store confidential information about your customer such as credit card numbers.</p> <p>Add this note</p>	<p>A Confirmation screen displays to confirm the change was successful.</p>
 <p>MARY KAY® InTouch Welcome Омми Мергендәс myCustomers Orders Customers Reminders Customer Detail Daisy Duck Registered</p> <p>Add a note about Daisy</p> <p>Note: Customer Information Orders Products Activity Summary</p> <p>Add Order Edit customer Archive customer View customer subscriptions New Virtual Makeover</p> <p>REMINDERS</p> <ul style="list-style-type: none"> <input type="checkbox"/> New Website Registration <input type="checkbox"/> Follow up: 13.06.2013 <input type="checkbox"/> Follow up: 26.06.2013 <input type="checkbox"/> Follow up: 01.05.2013 <p>Add Reminder</p> <p>CONTACT INFO</p> <p>Profile Date: 30.04.2013</p> <p>Referred by: Minnie Mouse</p> <p>Email: lori.williams@ekcorp.com</p> <p>Phone: 1234567890 Primary M: 2345678901 W: +7 945 678-90-12</p> <p>Address:</p> <p>Mother Duck Primary 6229 Lake Lane Unit B Addison, TX 75001 468 789-01-23</p> <p>Customer prefers to be called after 6:00PM or on weekends.</p> <p>K2.1.48.8 © Mary Kay 2013</p>	<p>To view the changes, look in the Contact Information section.</p> <p>For this example we changed the number marked as “primary” from the mobile number to the home number.</p> <p>The Home number is designated as the Primary phone number.</p>

Add Customer Notes

The top screenshot shows the 'Customer Detail' page for 'Daisy Duck'. A red box highlights the 'Notes' input field where text can be typed. A small number '1000' is visible in the bottom right corner of the field, indicating the character limit. Below the input field is a note: '*Notes should not be used to store confidential information about your customer such as credit card numbers.' To the right of the notes field is a sidebar with links like 'Add Order', 'Edit customer', and 'Add reminder'. The bottom screenshot shows the same page after a note has been added: 'Daisy is a teacher. Daisy likes Journey. Daisy uses Luminous Foundation - Ivory 6'. The character count '917' is shown in the bottom right corner of the notes field, and the 'Add this note' button is highlighted with a red box.

Adding a note concerning your customer is quick and easy.

The **Notes** field is open by default when you open the **Profile Page**.

The **number** in the right-hand corner tells you how many characters can be typed in this field. The number decreases as characters are entered so you always know exactly how much text you can still enter.

To enter a note, click inside the **Notes** field and enter the note.

Note: Notice that the number in the right-hand corner is decreasing as text is entered.

When you are finished, click **Add This Note**.



Daisy Duck Registered

Notes Customer Information Orders Products Activity Summary

Add a note about Daisy

1000

*Note should not be used to store confidential information about your customer such as credit card numbers.

Add this note

Сейсембі, сауір 30 

Daisy is a teacher.
Daisy likes Journey.
Daisy uses Luminous Foundation - Ivory 6

Дүйсембі, сауір 28 

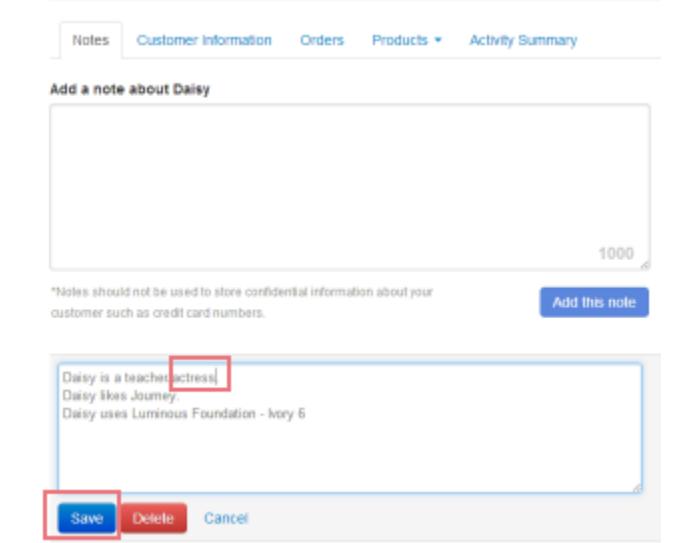
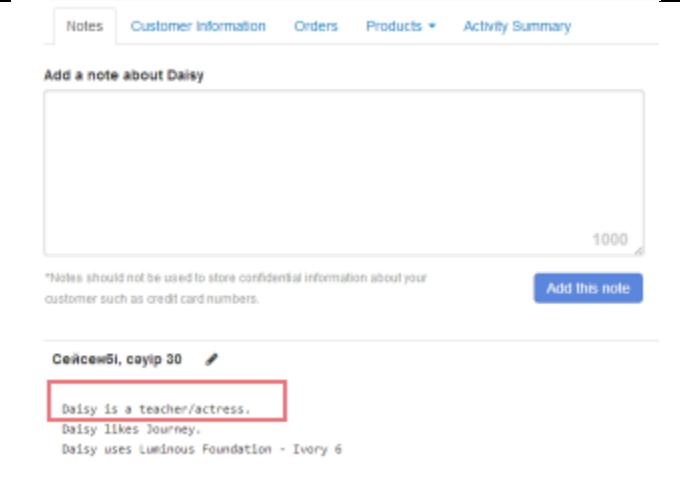
Customer prefers to be called after 5:00PM or on week-ends.

The note is displayed below the **Notes** field.

NOTE: The second note was automatically generated by the system when she was added as a customer. **Contact Preferences** are completed on the **MyMK** section of the Personal Website or on the **Add a Customer** screen in myCustomers and a note is automatically generated.

How to Edit Customer Notes

 <p>Daisy Duck <small>Registered</small></p> <p>Notes Customer Information Orders Products Activity Summary</p> <p>Add a note about Daisy</p> <div style="border: 1px solid #ccc; padding: 10px; min-height: 150px;"><p>Daisy is a teacher. Daisy likes Journey. Daisy uses Luminous Foundation - Ivory 6</p></div> <p>*Notes should not be used to store confidential information about your customer such as credit card numbers.</p> <p>Сейкенбі, соылғ 30 </p> <p>Daisy is a teacher. Daisy likes Journey. Daisy uses Luminous Foundation - Ivory 6</p> <p>Дүйкенбі, соылғ 29 </p> <p>Customer prefers to be called after 5:00PM or on week-ends.</p>	<p>Notes created by you or notes generated by the system can be easily edited on the Profile Page.</p> <p>To make changes to a notes, click the Pencil icon located beside the date the note was created.</p>
<p>Add a note about Daisy</p> <div style="border: 1px solid #ccc; padding: 10px; min-height: 150px;"><p>Daisy is a teacher. Daisy likes Journey. Daisy uses Luminous Foundation - Ivory 6</p></div> <p>*Notes should not be used to store confidential information about your customer such as credit card numbers.</p> <p>Save Delete Cancel</p>	<p>An editable Note field displays the current note.</p>

 <p>Notes Customer Information Orders Products Activity Summary</p> <p>Add a note about Daisy</p> <p>Daisy is a teacher/actress.</p> <p>Daisy likes Journey.</p> <p>Daisy uses Luminous Foundation - Ivory 6</p> <p>Save Delete Cancel</p>	<p>Make the changes to the note.</p> <p>Click Save to save the changes.</p> <p>To leave it as is and not make any changes, click Cancel.</p>
 <p>Notes Customer Information Orders Products Activity Summary</p> <p>Add a note about Daisy</p> <p>Daisy is a teacher/actress.</p> <p>Daisy likes Journey.</p> <p>Daisy uses Luminous Foundation - Ivory 6</p>	<p>The note displays with the changes.</p>

How to Delete Customer Notes

The screenshot shows a customer detail page for 'Daisy Duck'. The top section displays basic customer information: Name (Daisy Duck), Status (Registered), and a profile picture of Daisy Duck. Below this are tabs for Notes, Customer Information, Orders, Products, and Activity Summary. A note about Daisy is present in the Notes tab, which includes a note body, a note count (20), and a red-bordered delete button.

The right side of the screen shows a detailed view of the note. It includes sections for Add Order, Edit customer, Archive customer, View customer subscriptions, New Virtual Makeover, Reminders, Contact Info, and Profile Date (30.04.2013). The note itself contains the text: 'Daisy is a teacher/actress. Daisy likes Journey. Daisy uses Luminous Foundation - Ivory 6'.

The bottom section of the screenshot shows a confirmation dialog box with three buttons: Save, Delete, and Cancel. The Delete button is highlighted with a red border.

To delete a customer note is very easy.

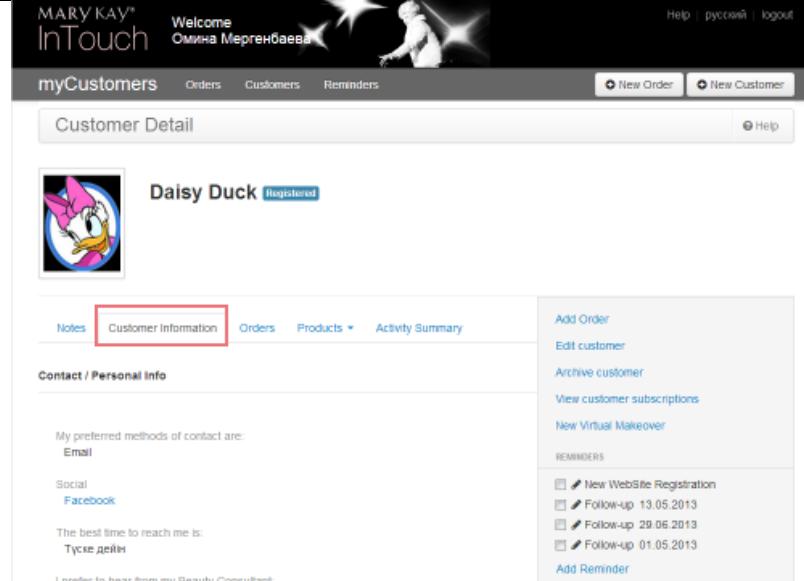
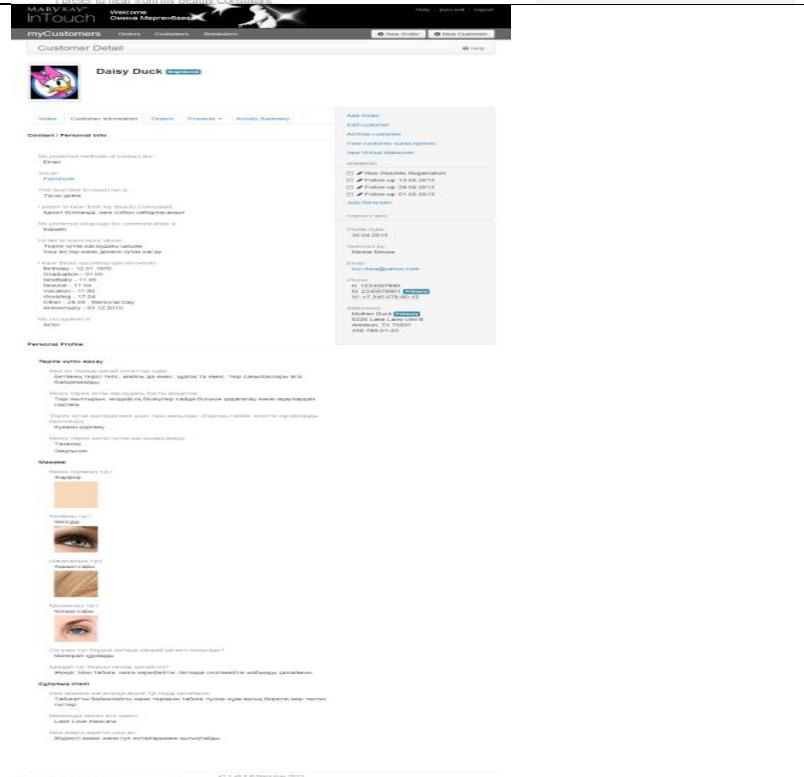
Click the **Pencil** icon to open the note.

The **Note** field opens.

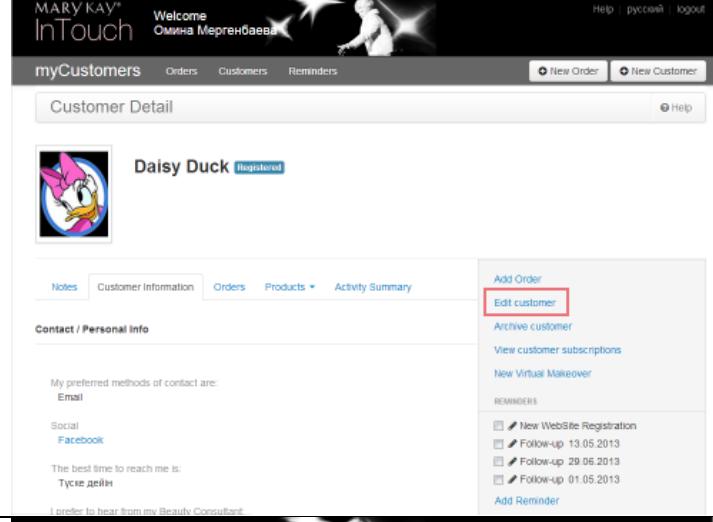
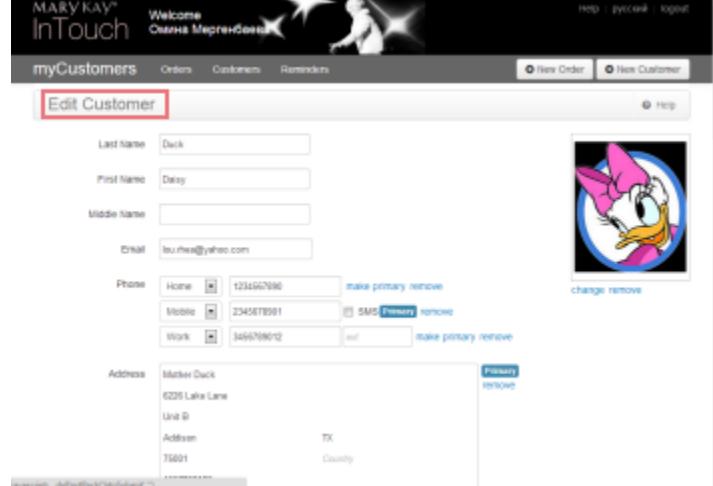
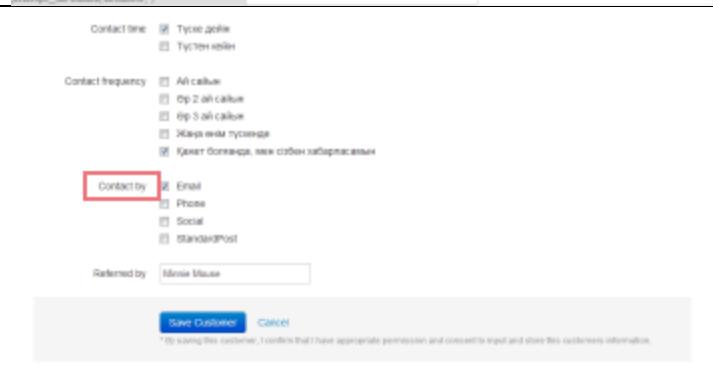
To delete the note completely, click the **Delete** button.

If you do not want to delete it completely, click **Cancel**.

How to View Your Customer's Contact Preferences and Profile

	<p>To view a customer's Contact Preferences and Profile, click the Customer Information tab.</p>
	<p>The information in this section is from the Add a Customer page or from the customer's MyMK page on the Personal WebSite.</p>

How to Edit the Information on the Customer Information Tab

	<p>If something on the Customer Information tab needs to be changed, click the Edit Customer link on the right side of the Profile Page.</p>
	<p>The Edit Customer screen displays.</p>
	<p>Locate the field or selection that needs to be changed.</p>

Contact time: Түзө деңгэ Түстен кейін

Contact frequency: Ай сайын Ер 2 ай сайын Ер 3 ай сайын Жауа етін түсінде Қажет болғанда, мен сибен хабарласамын

Contact by: Email Phone Social StandardPost

Referred by: Minnie Mouse

Save Customer Cancel

* By saving this customer, I confirm that I have appropriate permission and consent to input and store this customers information.

For this example we will add a method of contact to the **Contact By** section.

To save the change, scroll down to the bottom of the **Edit Customer** field.

Click **Save Customer**.

If you do not want to save the changes, click **Cancel**.

MARY KAY® InTouch Welcome Ольга Мергебаева

myCustomers Orders Customers Reminders

Customer Detail

Daisy Duck Registered

Notes Customer Information Orders Products Activity Summary

Add a note about Daisy

Add this note

* Notes should not be used to store confidential information about your customer such as credit card numbers.

Add Order Edit customer Archive customer View customer subscriptions New Virtual Makeover

REMINDERS

- New Website Registration
- Follow up: 13.06.2013
- Follow up: 28.06.2013
- Follow-up: 01.05.2013

Add Reminder

A **Confirmation Screen** displays confirming the change was successful.

MARY KAY® InTouch Welcome Ольга Мергебаева

myCustomers Orders Customers Reminders

Customer Detail

Daisy Duck Registered

Notes Customer Information Orders Products Activity Summary

Contact / Personal Info

My preferred methods of contact are:
Email
Phone

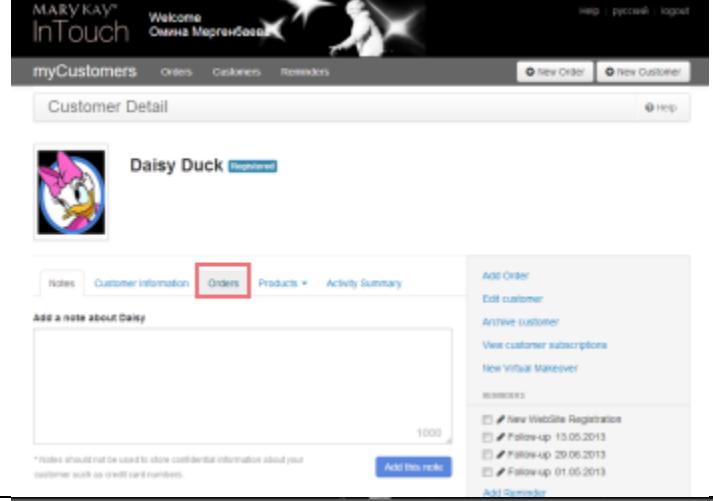
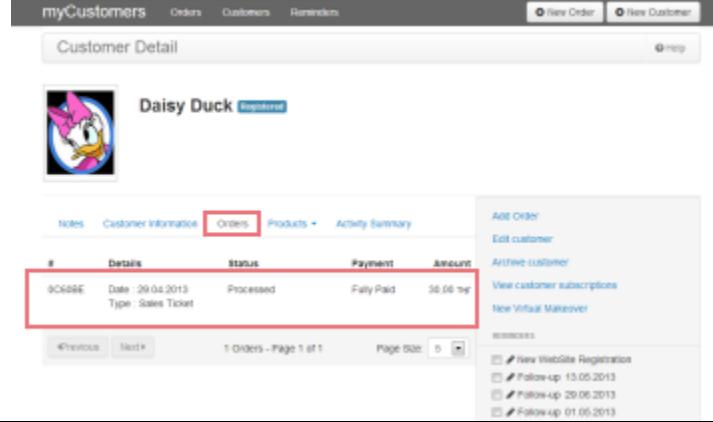
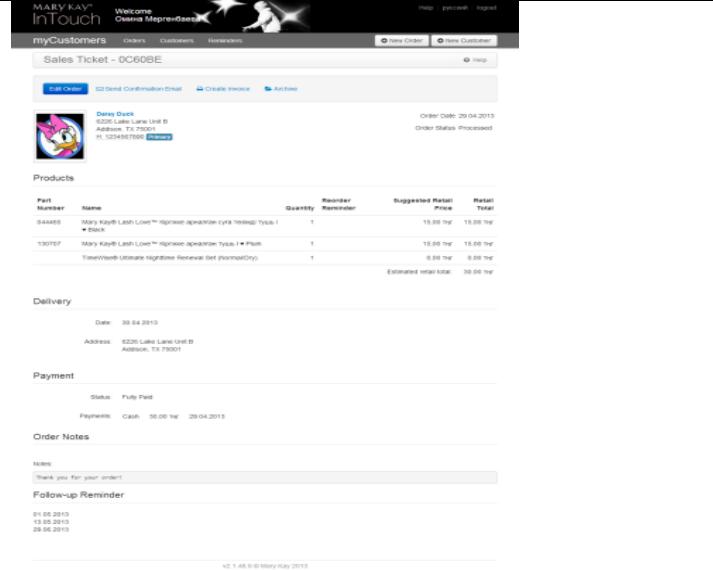
Add Order Edit customer Archive customer View customer subscriptions New Virtual Makeover

REMINDERS

- New Website Registration

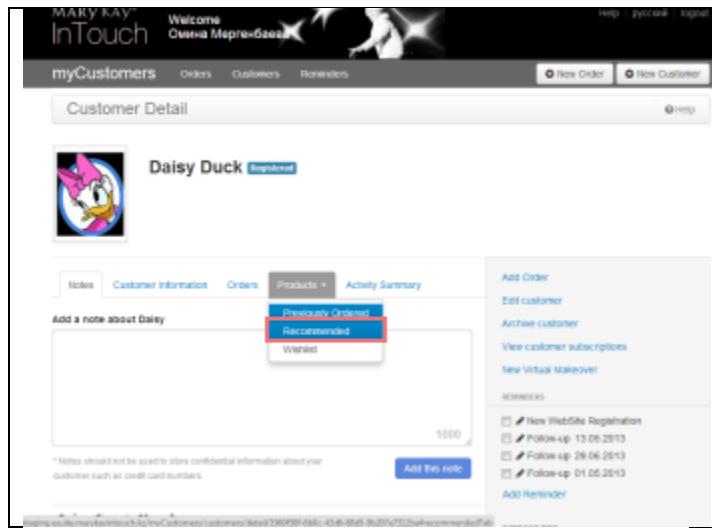
To view the change, click the **Customer Information** tab and locate the change.

How to View and Open a Customer's Orders from the Profile Page

	<p>To view a customer's orders, click the Orders tab on the Profile Page.</p>
	<p>Orders for this customer are displayed.</p> <p>To view the order details, click the order.</p>
	<p>The order is displayed. Click the browser Back button to return to the Profile Page.</p>

How to View the Products a Customer Has Previously Ordered

How to View a Customer's Recommended Products



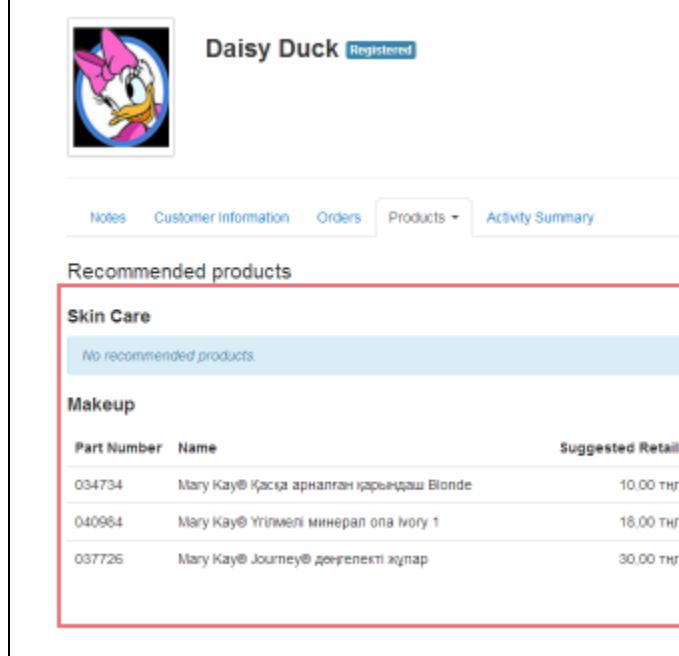
The screenshot shows the Mary Kay InTouch software interface. At the top, there is a navigation bar with links for 'myCustomers', 'Orders', 'Customers', 'Resources', 'New Order', and 'New Customer'. Below this is a 'Customer Detail' section for a customer named 'Daisy Duck' (status: Registered). The main content area has tabs for 'Notes', 'Customer Information', 'Orders', 'Products', and 'Activity Summary'. The 'Products' tab is currently selected and has a dropdown menu open, with the option 'Recommended' highlighted. Other options in the dropdown include 'Previously Ordered' and 'Wishlist'. To the right of the main content area is a sidebar with links for 'Add Order', 'Edit customer', 'Archive customer', 'View customer subscriptions', 'New Virtual Makeover', and 'Reminders'. There is also a list of recent activities.

To view the products recommended for a customer, click the **Products** tab.

A drop-down displays.

Select **Recommended** from the drop-down menu.

Note: Recommended products are automatically generated based on the customer's answers to the profile questions.



The screenshot shows the 'Recommended products' screen for the same customer, 'Daisy Duck'. The 'Products' tab is selected. The main content area is titled 'Recommended products' and contains a section for 'Skin Care'. A message states 'No recommended products.' Below this, there is a section for 'Makeup' with a table listing three products:

Part Number	Name	Suggested Retail
034734	Mary Kay® Каска арналған қарындаш Blonde	10.00 тнг
040984	Mary Kay® Үйінде мінерал ола Ivory 1	16.00 тнг
037726	Mary Kay® Journey® дәуілекті жұпар	30.00 тнг

The **Recommended Products** screen displays with a list of recommended products displayed by category.

Daisy Duck [Details](#)

Notes Customer Information Orders Products + Activity Summary

Recommended products

Skin Care

No recommended products

Makeup

Part Number	Name	Suggested Retail
834734	Mary Kay® Күсір аралық сарылдағыш	16.00 ҮШ
	Күтпіс іш бетте тұтасмадаған, беред және жасырақ көрнекте. Күтпіс: Mary Kay® Күсір аралық сарылдағыш толығырттық. Болттар инде Ер сатында шифрлелі болады. + Кремтердегі, сұл айдарлы формулалардан жасалғанынан-ғана анықталған. NOTE: In electronic media, this color may vary.	
940084	Mary Kay® Ушамен киндердің өзің күні	18.00 ҮШ
837726	Mary Kay® Жасырын дәулеттің күні	18.00 ҮШ

Add Order
Edit Customer
Archive Customer
View customer subscriptions
New Virtual Makeover

Comments

New Website Registration
 Follow-up 13.05.2013
 Follow-up 26.06.2013
 Follow-up 01.05.2013

Add Reminders

Customer Since

Profile Date: 30.04.2013

Referred by: Minna Morris

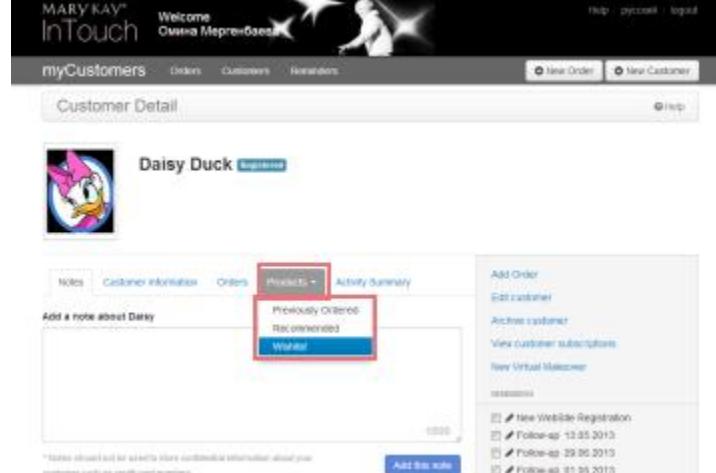
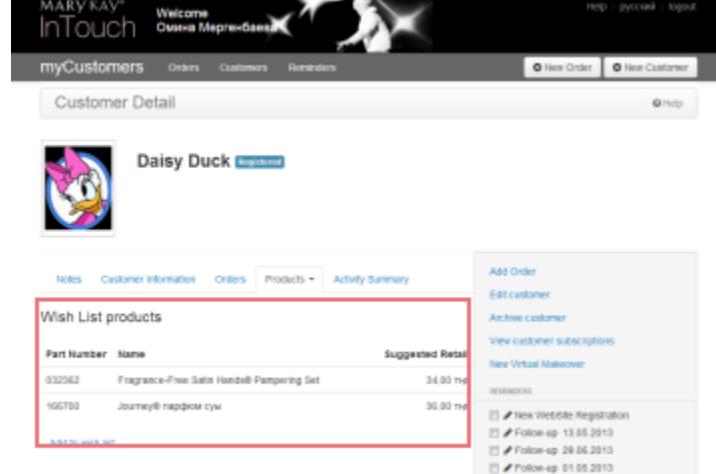
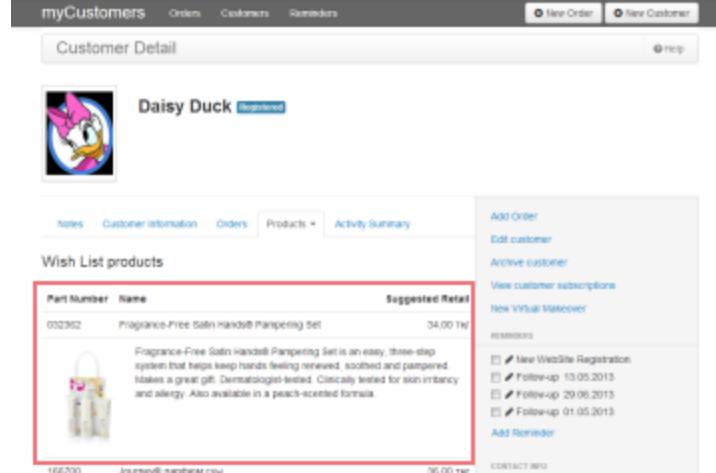
Email: kou.williams@mcicorp.com

Phone:
H: 1234567890 [Primary](#)
M: 2345678901
W: +7 349 678-90-12

Address:
Mother Duck [Primary](#)
6228 Lake Lane Unit B
Addison, TX 75001
406 789-01-23

To view details of the products, click the product. The details are displayed.

How to View the Customer's Wishlist

	<p>To view a customer's Wishlist, click the Products tab.</p> <p>A drop-down menu displays.</p> <p>Select Wishlist from the drop-down menu.</p>
	<p>Products the customer has on her Wishlist are displayed.</p>
	<p>To view the details of a product, click the product and the product details are displayed.</p>

View All of Your Interactions with a Customer

The top screenshot shows the 'Customer Detail' page for 'Daisy Duck'. The 'Activity Summary' tab is highlighted with a red box. A note field contains 'Add a note about Daisy'. The bottom screenshot shows the same page after adding a note: 'Added note: Daisy is a teacher/actress. Daisy likes Journey. Daisy uses Luminescent Foundation - Ivory 6'. Both screenshots show a sidebar with options like 'Add Order', 'Edit customer', and a list of recent activities.

To view all reminders, follow-ups and other interactions with a customer, click the **Activity Summary** tab.

All interactions with the customer are displayed along with the date they were created.

To view additional pages or return to the previous page, use the **Previous** and **Next** buttons.

To increase or decrease the number of items shown, use the **Page Size** field to select smaller or larger numbers from the drop-down menu. The default number displayed is 10.

How to Create an Order for a Customer from the Profile Page

The top screenshot shows the 'Customer Detail' page for 'Daisy Duck'. The sidebar menu on the right includes an 'Add Order' link, which is highlighted with a red box. The bottom screenshot shows the 'New Sales Ticket' page for the same customer, displaying the order details and status.

To create an order for a customer from the Profile Page, click the **Add Order** link.

The New Sales Ticket Page displays. For your convenience, some customer information is automatically included like **Customer Information** and the **Delivery** field, provided that field was completed on the customer's profile.

Until the order is marked complete or saved, it remains in a **New** status. Once an order is saved, the order status will change to Pending. The Pending status means the order is not complete.

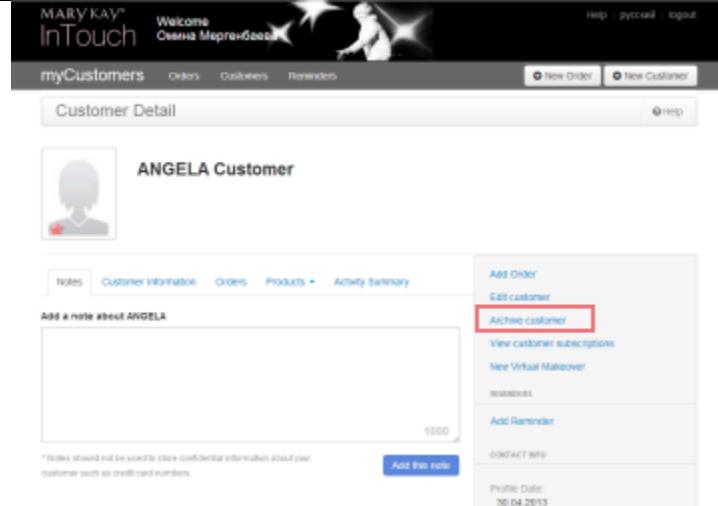
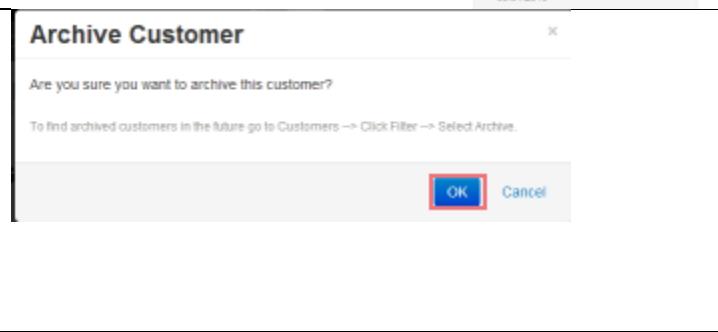
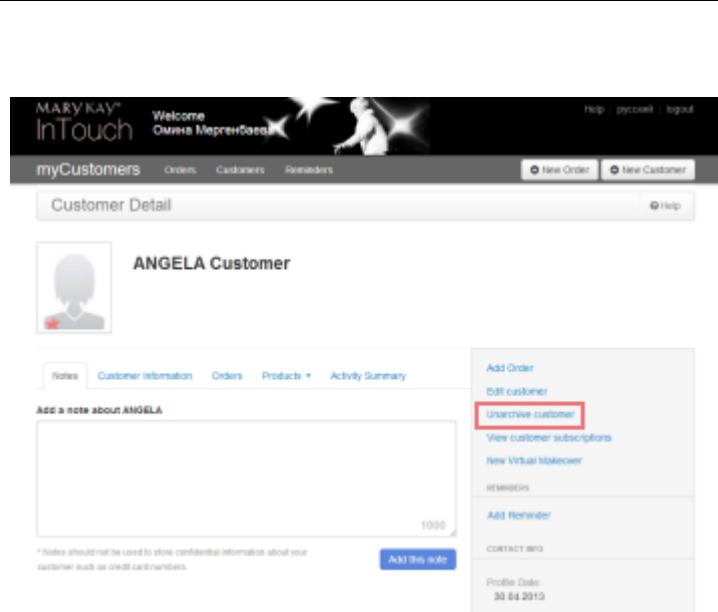
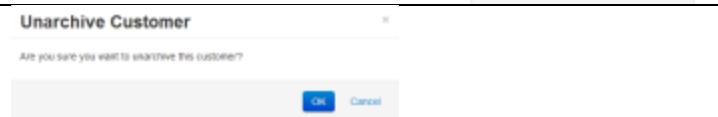
Once an order is marked complete the pending status changes to **Processed**. The **Processed** status means that the order is complete but not shipped or delivered.

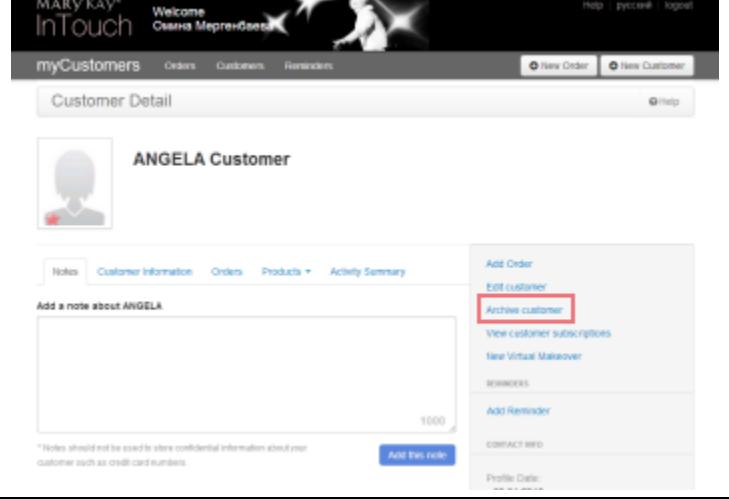
Once the order has been shipped or delivered you can change the status from **Processed** to **Shipped and Delivered**.

Note: The order can be reopened and edited at any time.

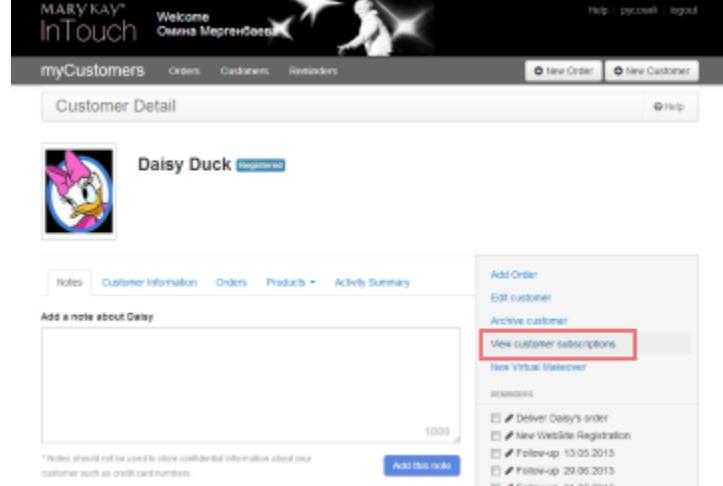
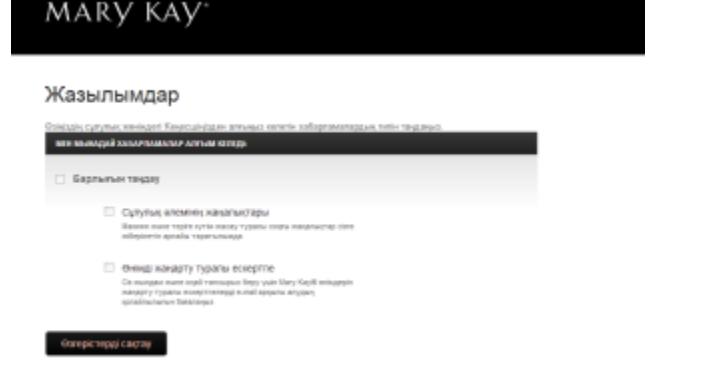
For additional instruction on how to create an order, see the module, **How to Create a New Order**.

How to Archive or Unarchive a Customer from the Profile Page

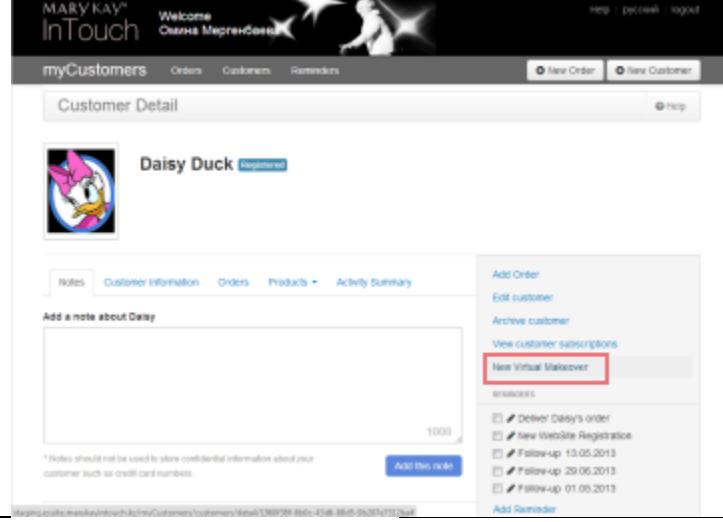
	<p>If a customer hasn't ordered for a long time you may want to store her along with her information in the Archived Customer List.</p> <p>To add a customer to the archive list from the Profile Page, click the Archive Customer list.</p>
	<p>A Confirmation screen displays to confirm you do want to archive this customer.</p> <p>Click OK to continue and add her to the Archived Customer List.</p> <p>Click Cancel if you do not want to add the customer to the Archived Customer List.</p>
	<p>You are returned to customer's Profile Page.</p> <p>To confirm the customer has been archived, click the browser's Refresh icon.</p> <p></p> <p>The Archive Customer link changes to Unarchive Customer.</p> <p>To remove a customer from the Archived Customer List, click the Unarchive Customer link.</p>
	<p>A Confirmation screen displays to confirm you do want to remove this customer</p>

	<p>from the Archived Customers List.</p> <p>Click OK to continue and remove her from the Archived Customer List.</p> <p>Click Cancel if you do not want to remove the customer from the Archived Customer List.</p>
	<p>You are returned to customer's Profile Page.</p> <p>To confirm the customer has been removed from the Archived Customer List, click the browser's Refresh icon.</p> <p>The Unarchive Customer link changes to Archive Customer.</p>

How to View a Customer's Subscriptions

	<p>To view a customer's subscriptions, click the View Customer Subscriptions link.</p>
	<p>A screen with the subscription options is displayed. If the customer has subscriptions selected a checkmark will be in the checkbox beside each option.</p>

How to Upload a Customer's Picture to the Virtual Makeover

	<p>To upload your customer's picture to the Virtual Makeover, click the New Virtual Makeover link.</p>
	<p>A confirmation screen displays to confirm you have the customer's permission to upload the customer's picture to the Virtual Makeover.</p> <p>If you have her permission, click Accept and continue to open the Virtual Makeover.</p> <p>If you do not have her permission, click Decline. You will not be able to upload her picture to the Virtual Makeover site.</p>

How to Create a Reminder for a Customer

MARY KAY® InTouch Welcome Осна Мережі
myCustomers Orders Customers Reminders Help | pycomit | logout

Customer Detail

Daisy Duck Registered

Add a note about Daisy

* Notes should not be used to store confidential information about your customer such as credit card numbers.

Add this note

Add Reminder

Deikewell, copyip 30

Daisy likes Disney.
Daisy uses Luminous Foundation - Every 4 weeks.

Dykeswell, copyip 29

Customer prefers to be called after 6:00PM or on week-ends.

To create a reminder for a customer when you are on the Profile Page, click the **Add Reminder** link.

MARY KAY® InTouch Welcome Осна Мережі
myCustomers Orders Customers Reminders Help | pycomit | logout

Customer Detail

Daisy Duck Registered

Add a note about Daisy

* Notes should not be used to store confidential information about your customer such as credit card numbers.

Add this note

Deikewell, copyip 30

Daisy likes Disney.
Daisy uses Luminous Foundation - Every 4 weeks.

Dykeswell, copyip 29

Customer prefers to be called after 6:00PM or on week-ends.

Title

Description

Daisy's order is in - call to see when to deliver.

Due On

01.05.2013

Add Reminder Cancel

The section expands.

The **Title**, **Description** and **Due On** fields display.

Click inside each field and enter the information for the reminder.

Title

Product is in

Description

Daisy's order is in - call to see when to deliver.

Due On

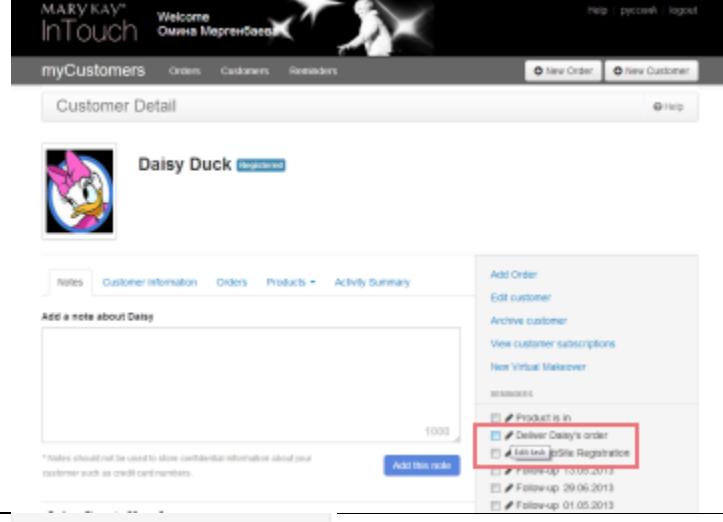
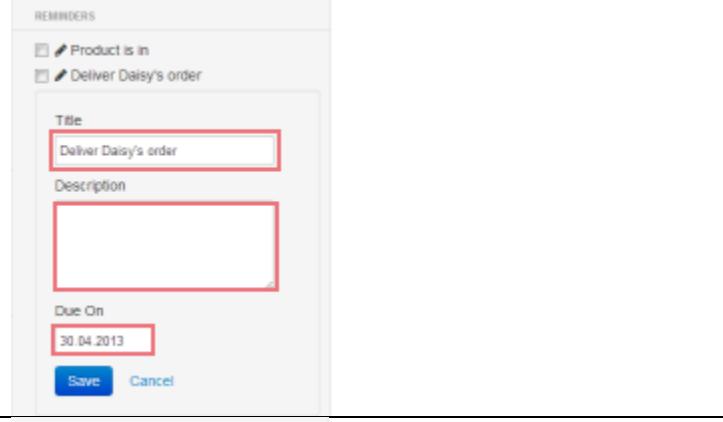
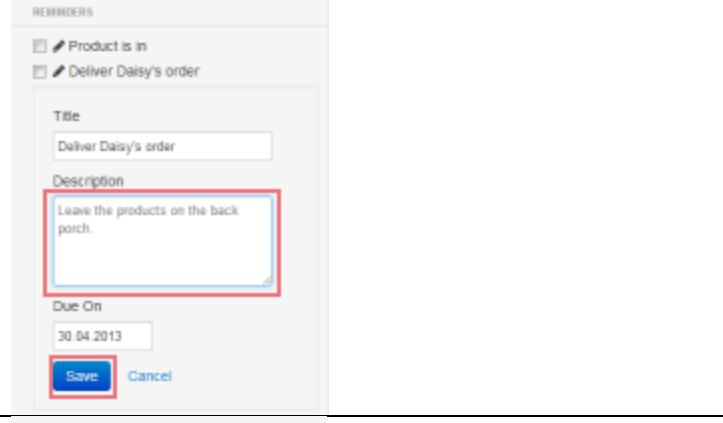
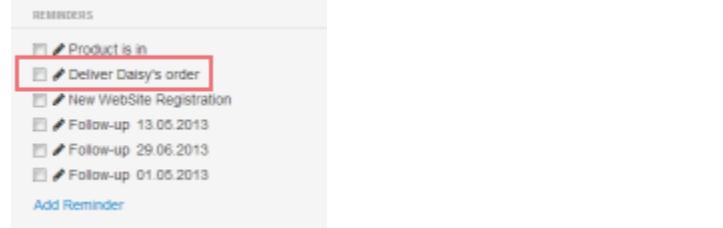
01.05.2013

Add Reminder Cancel

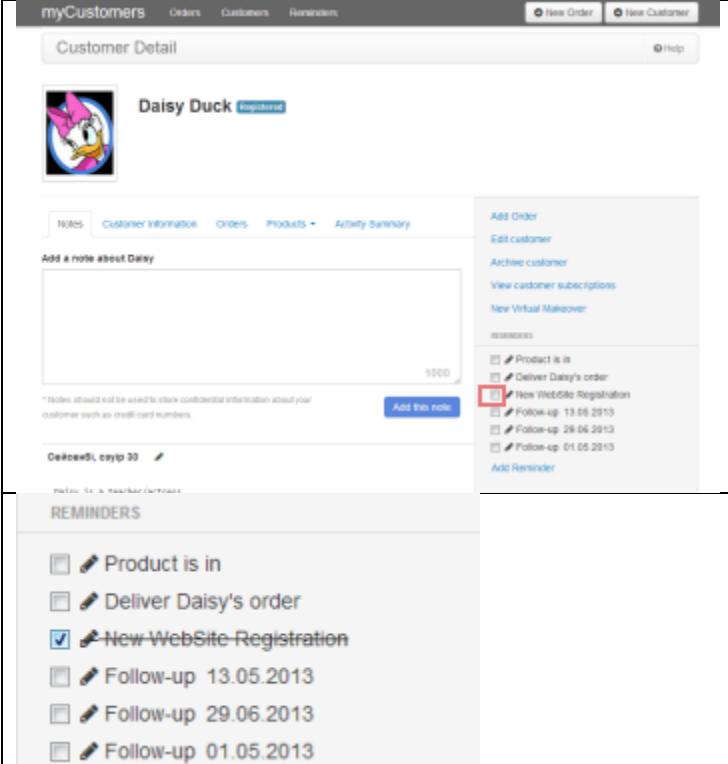
Click **Add Reminder** to add the customer's reminder.

	<p>The reminder is added to the Reminder List.</p> <p>Note: Reminders for all customers are displayed in the Reminders section of myCustomers.</p>
---	---

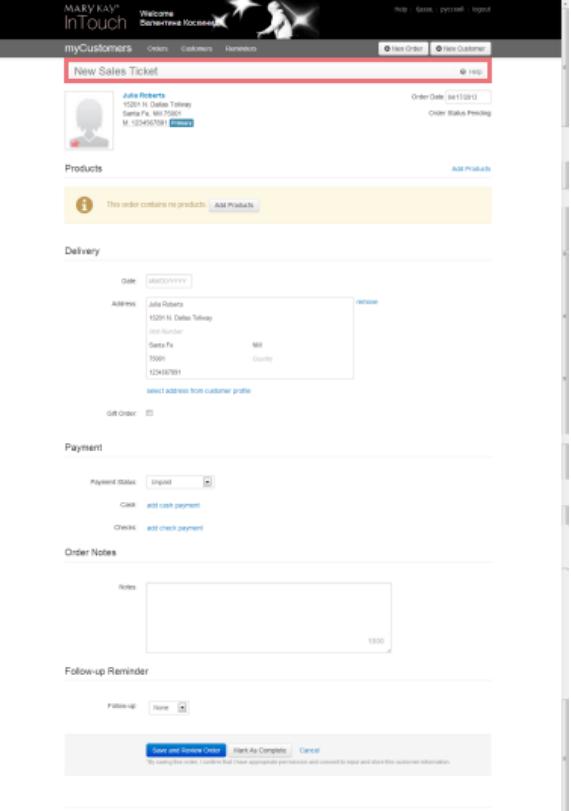
How to Edit a Reminder for a Customer

	<p>To make changes to a reminder, click the Pencil icon.</p>
	<p>The Title, Description, and Due On fields for the selected reminder open.</p>
	<p>Make the necessary changes to the reminder. Click the Save button to save the changes.</p>
	<p>The reminder is updated and added back to the Reminder List.</p>

How to Delete a Customer Reminder

	<p>To delete a reminder, click the checkbox beside the reminder you wish to remove.</p> <p>A line is marked through the reminder indicating it will be deleted once the page is refreshed by clicking the browser's Refresh button or by leaving the page and reopening it.</p>
--	---

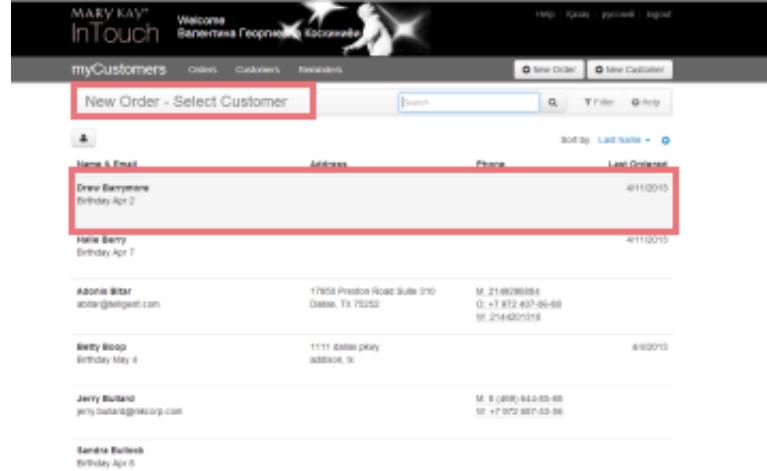
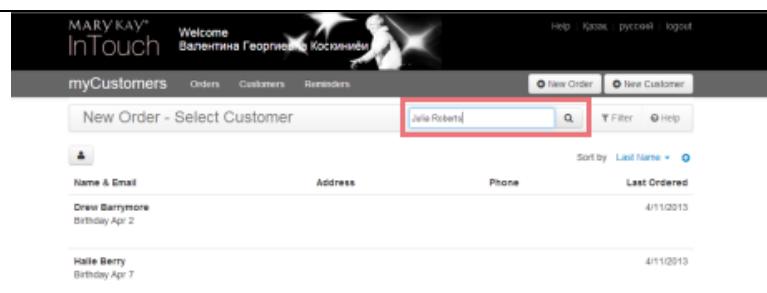
Create a New Order



Creating a customer's order has never been easier. In this module you can see how to,

- [Getting started](#)
- [Create the new order](#)
- [Add products to the order](#)
- [Removing products](#)
- [Reorder Reminders](#)
- [Adding a delivery address](#)
- [Add a gift note](#)
- [Payment](#)
 - [Cash payment](#)
 - [Payment by check](#)
- [Add order notes](#)
- [Add a follow-up](#)
- [Save, Complete or Cancel an order](#)
- [Review the order](#)
- [Editing the order](#)
- [Sending a confirmation email](#)
- [Creating an invoice](#)

How to Create a New Order – Getting Started

	<p>To enter an order, click the New Order button.</p> <p>The New Order button is located on the Navigation Bar in myCustomers which means it's easy to access from every page.</p>
	<p>The first step is to select the customer.</p> <p>If you see the customer on the first page, click her name and the New Sales Ticket page opens automatically.</p> <p>If the customer's name is not on the first page Search is the easiest and fastest way to locate her.</p>
	<p>Type the customer's name in the Search field and press the Enter key on the keyboard or click the Search icon.</p>

The screenshot shows the MARY KAY InTouch software interface. At the top, there's a navigation bar with links for 'Help', 'Logout', 'Printout', and 'Import'. Below the navigation is a search bar with fields for 'New Order' and 'New Customer'. The main area is titled 'myCustomers' and includes tabs for 'Owners', 'Customers', and 'Rewards'. A search bar at the top of this section allows filtering by name ('Julia Roberts') and includes 'Q', 'Y Filter', and 'Help' buttons. Below the search is a table header with columns: 'NAME & EMAIL', 'AGE/SEX', 'PHONE', and 'LAST ORDER DATE'. A single customer record is listed: 'Julia Anna Roberts' (juliaroberts@yahoo.com), 'Age: 18 Sex: F', 'Phone: 1111 Santa Fe Trail, Santa Fe, NM 12345', and 'Last Order Date: 06/12/2013'. The entire row for this customer is highlighted with a red box. At the bottom of the table, there are buttons for 'Previous', 'Next', and 'Print', along with a note '1 Customers - Page 1 of 1' and a 'Page Size' dropdown set to 10.

The customer is displayed.
Click the customer's name
to open the **New Sales
Ticket** page.

Create the New Order

The screenshot shows the 'New Sales Ticket' page in the Mary Kay InTouch software. It displays a customer profile for 'Julia Roberts' with the address '1528 N Dallas Tollway, Suite 700, Plano, TX 75024, 462567891'. The 'Delivery' section includes a date field set to '04/01/2013' and a dropdown menu for 'Method'. The 'Payment' section shows 'Pending' status with options for 'Cash' and 'Check'. The 'Order Notes' section has a notes input field. The 'Follow-up Reminder' section has a dropdown set to 'None'. At the bottom, there are buttons for 'Save and Review Later', 'Mark As Complete', and 'Cancel'.

The New Sales Ticket page is where the order is entered.

For your convenience, some customer information is automatically included like **Customer Information** and the **Delivery** field, provided that field was completed on the customer's profile.

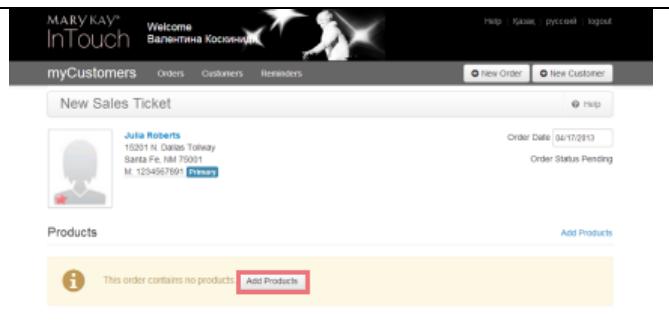
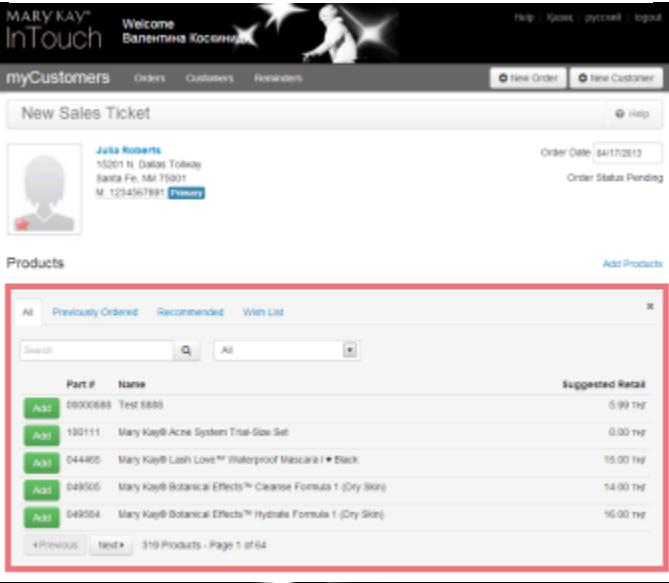
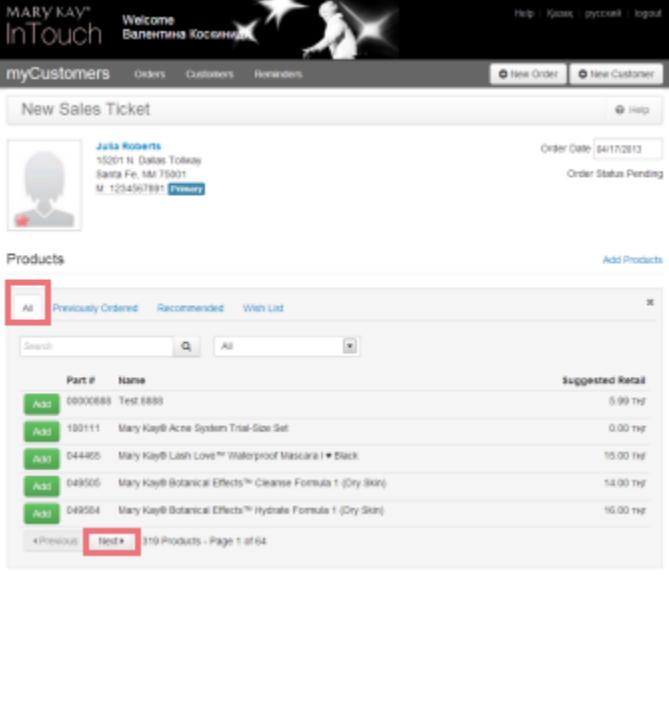
Until the order is marked complete, it remains in a **Pending** status. The **Pending** status means that the order is not complete.

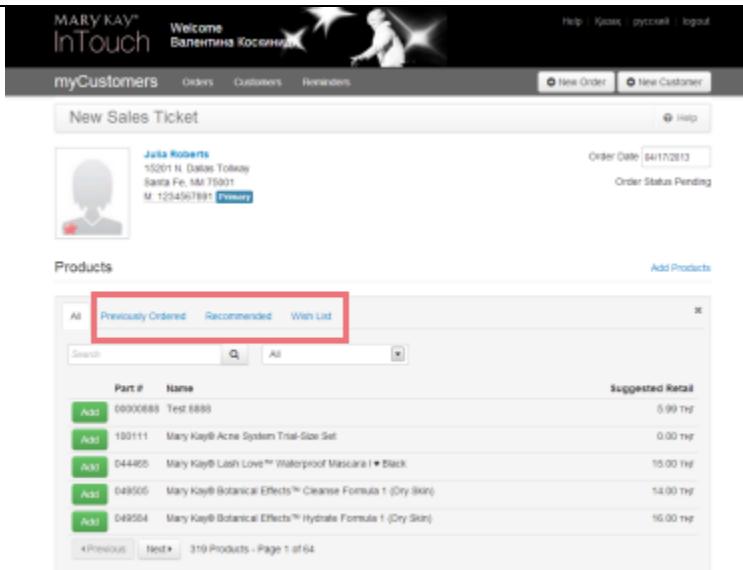
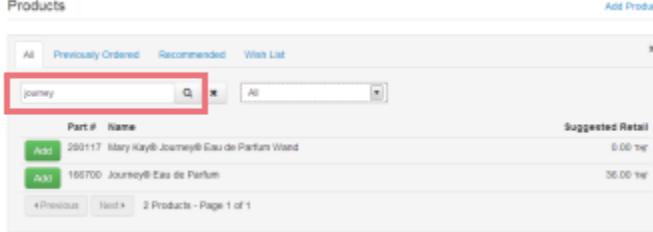
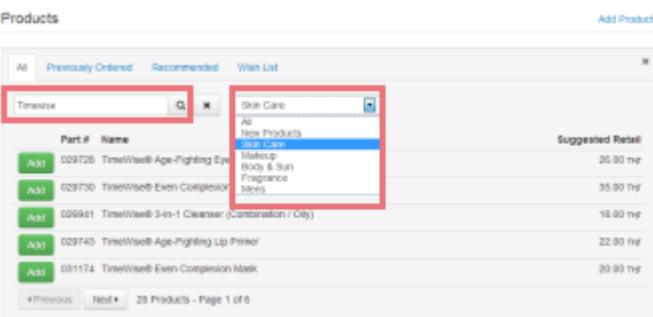
Once an order is marked complete the pending status changes to **Processed**. The **Processed** status means that the order is complete but not shipped or delivered.

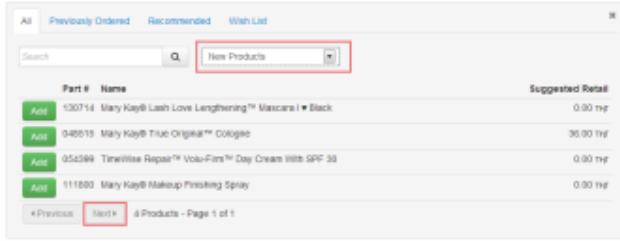
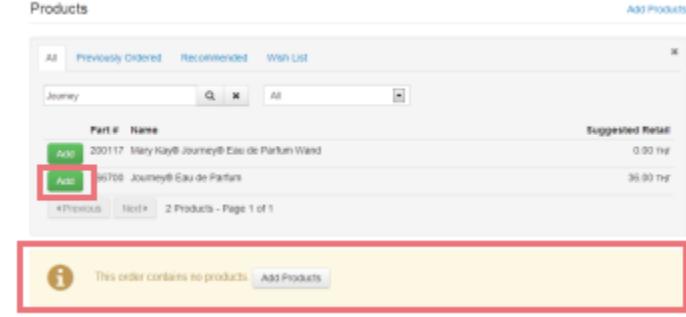
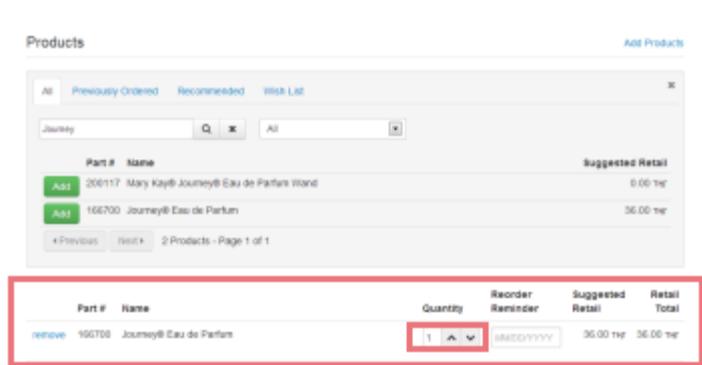
Once the order has been shipped or delivered you can change the status from **Processed** to **Shipped and Delivered**.

Note: The order can be reopened and edited at any time.

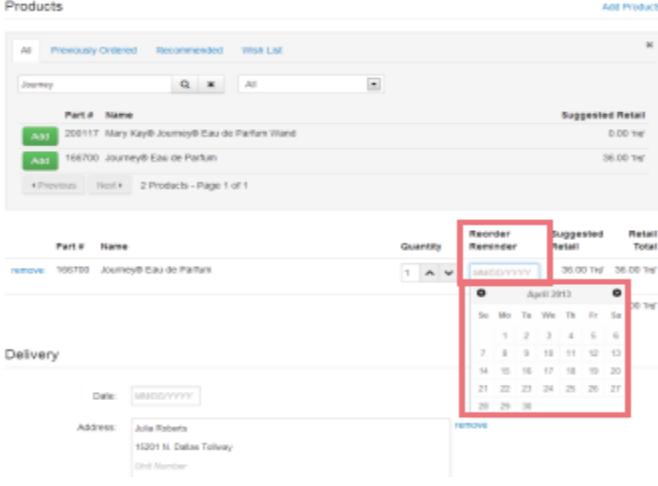
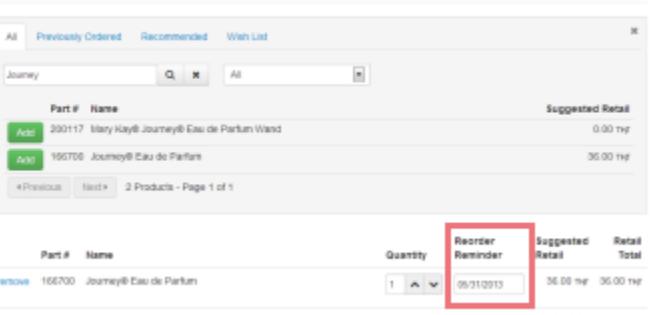
How to Add Products to an Order

	<p>First click the Add Products button.</p>
	<p>The Products section opens.</p>
	<p>Add products to the order by,</p> <ul style="list-style-type: none"> Using the All tab to view products and scroll between pages using the Previous and Next buttons Opening the Previously Ordered, Recommended or Wish List tabs Searching for a specific product using Search or Search combined with the Category Filter Search for products in a specific category by selecting a category from the Category Filter <p>All is the default view.</p>

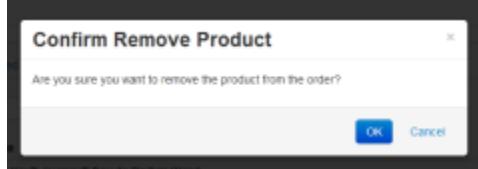
	<p>When you locate the product you need, click ADD to add the product to the order.</p> 
	<p>Click the Previously Ordered, Recommended, and Wish List tabs to view and quickly add products your customer has ordered in the past, products recommended for your customer based on her profile or products your customer has selected and added to her wish list.</p>
	<p>Searching for a product is a great tool to help you quickly find the product you need. Type the product name in the Search field. Click the Search icon  or press the Enter key on the keyboard. A list of products with the name you entered is displayed.</p> <p>Click ADD to add the product to the order.</p> 
	<p>You can refine your search by using the Category Filter. After typing the name of the product in the Search field, click the drop-down arrow beside the Category Filter and a list of categories displays. Choose the category. Products matching the product name you entered and the chosen category are displayed automatically.</p> 

	<p>The Category Filter can be used alone to view a specific category of products. Click the down arrow to view the drop-down menu. Select a category. Products in the selected category are automatically displayed.</p> <p>If the product you need isn't on the first page click the Next button to scroll through each page of products or use Search along with the category to find the product you need.</p>
 <p>Once you have located the product, click Add to add the product to the order.</p> <p>When a product is added the Add Products (yellow bar) below will disappear.</p>	
 <p>The Add Products bar is replaced with the product you added.</p> <p>Update the quantity by clicking the up or down arrows beside the Quantity field.</p>	

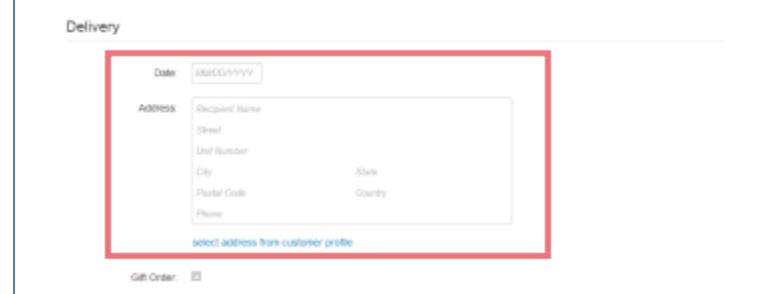
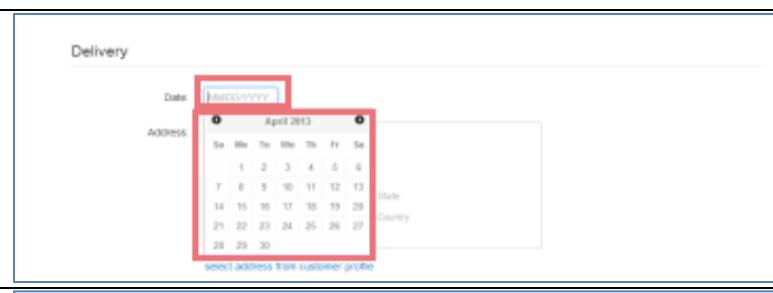
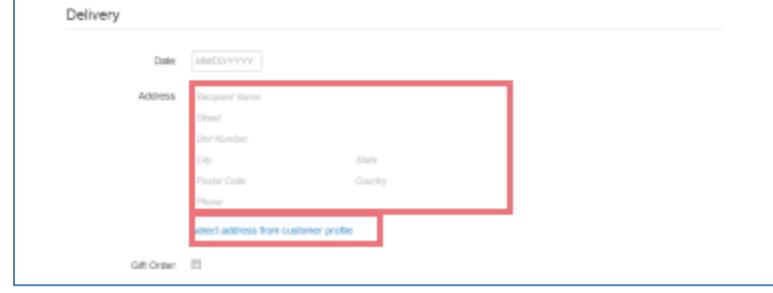
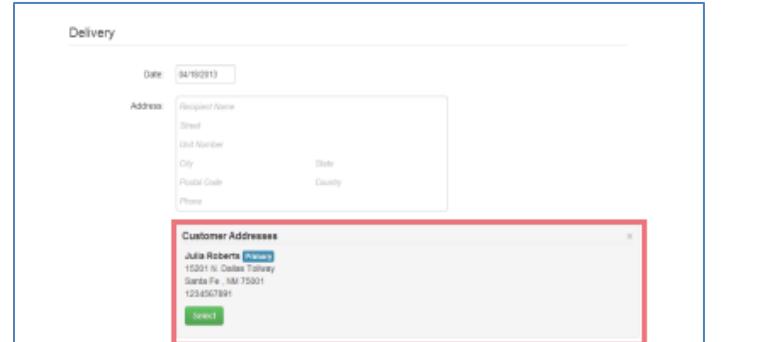
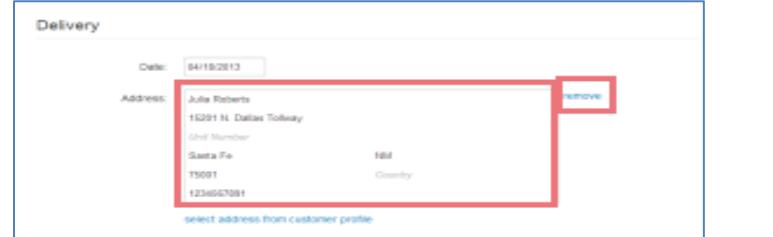
Adding a Reorder Reminder

 <p>The screenshot shows a product search interface for 'Journey'. Below it is a delivery form with a date field set to 'MM/DD/YYYY'. The 'Reorder Reminder' field is highlighted with a red box, and a calendar dropdown is open over it, showing the month of April 2013.</p>	<p>Add a reorder reminder. Click inside the Reorder Reminder field. A calendar displays. Select the date for the reorder reminder to be generated.</p> <p>To choose a different month, use the arrows at the top of the calendar to move between months.</p>
 <p>The screenshot shows the same product search and delivery form as the first row. The 'Reorder Reminder' field now contains the date '09/21/2013', indicating the reminder has been set.</p>	<p>The Reorder Reminder field is automatically updated with the date you selected.</p>

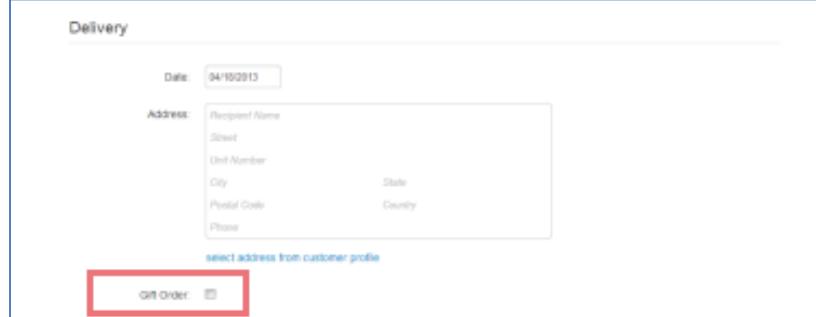
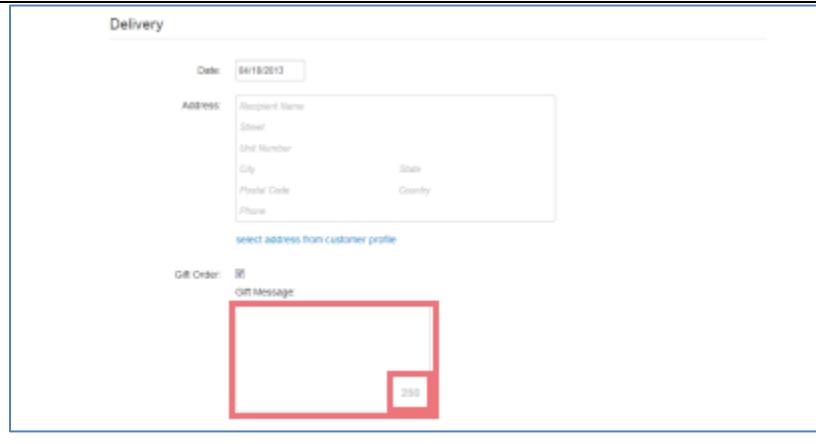
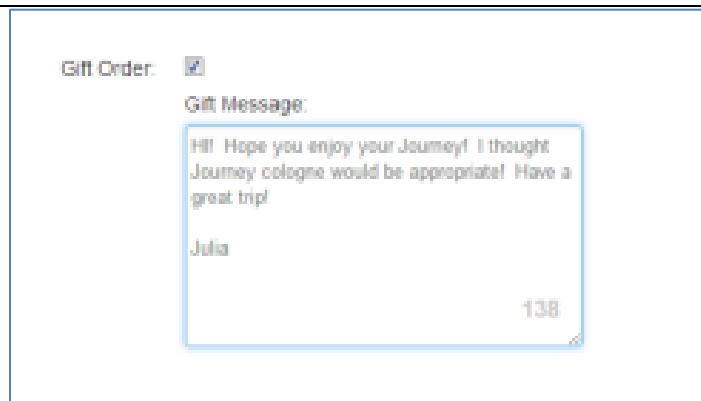
Remove a Product

	<p>Remove a product by clicking Remove beside the product you want to remove.</p>
	<p>A confirmation screen displays. Click Ok to remove the product. Click Cancel if you do not want to remove the product.</p>

How to Deliver to Another Address

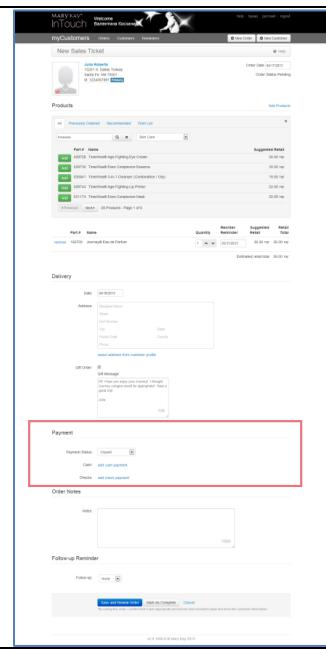
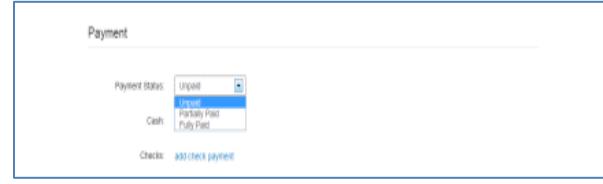
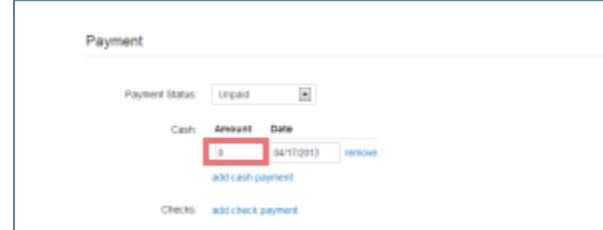
 <p>The screenshot shows the 'Delivery' section of an order form. It includes fields for 'Date' (MM/DD/YYYY), 'Recipient Name', 'Street', 'Unit Number', 'City', 'State', 'Postal Code', and 'Country'. A link 'select address from customer profile' is visible below the address fields.</p>	<p>If the order should be delivered to an address other than the customer's address, use the Delivery section to enter a different delivery address.</p> <p>Note: A different address can be setup in the Customer's Profile.</p>
 <p>The screenshot shows the 'Delivery' section with the 'Date' field populated with '04/18/2013'. A calendar dialog box is overlaid, showing the month of April 2013 with the 18th selected. Below the date field is a link 'select address from customer profile'.</p>	<p>Click in the Date field to enter a date. A calendar displays. Select the delivery date for the order.</p>
 <p>The screenshot shows the 'Delivery' section with the 'Address' section highlighted by a red box. It includes fields for 'Recipient Name', 'Street', 'Unit Number', 'City', 'State', 'Postal Code', and 'Country'. A link 'select address from customer profile' is visible below the address fields.</p>	<p>Enter the name, address and phone for the recipient in the appropriate fields.</p> <p>Note: If the address is in the customer's profile, click the link "Select address from customer's profile."</p>
 <p>The screenshot shows the 'Delivery' section with the 'Address' section highlighted by a red box. A confirmation dialog box titled 'Customer Addresses' is displayed, listing an address for 'Julia Roberts' at '16291 N. Dallas Tlwy Santa Fe NM 87501 1234567891'. A 'Select' button is at the bottom of the dialog.</p>	<p>A Confirmation box displays to confirm this is the address you want to add.</p> <p>Click Select to add the address or click the "X" to close the box and not add the address.</p>
 <p>The screenshot shows the 'Delivery' section with the 'Address' field containing the address information for 'Julia Roberts' and a 'remove' link next to it. Below the address field is a link 'select address from customer profile'.</p>	<p>The address is added after you have clicked Select.</p> <p>To remove the address, click Remove.</p>

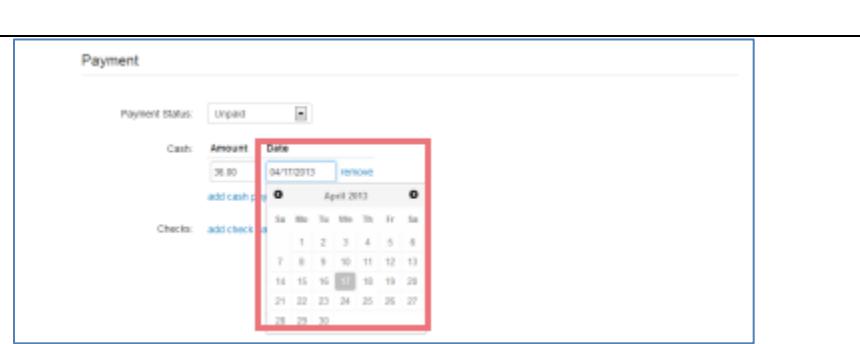
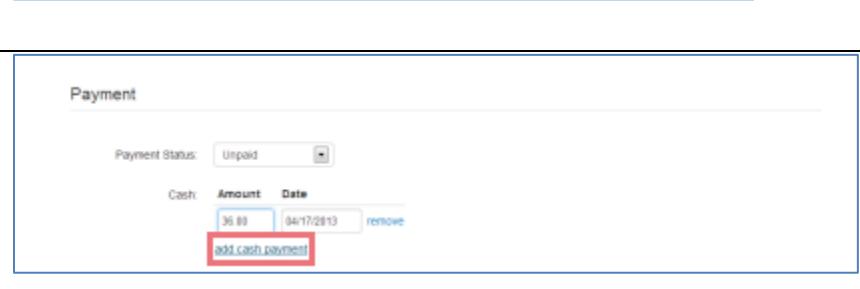
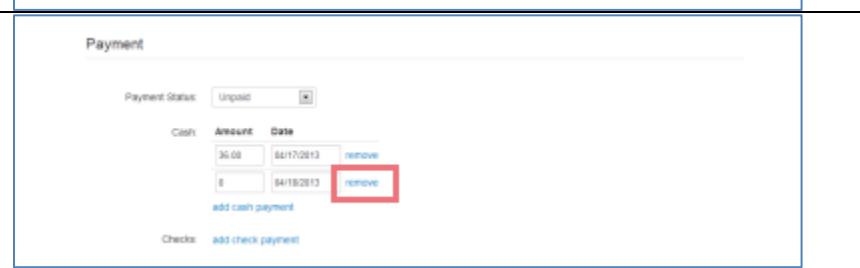
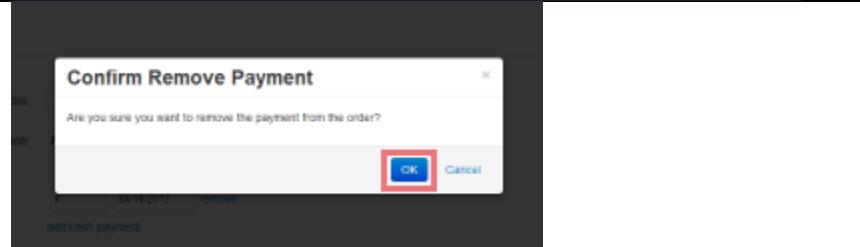
How to Add a Note for a Gift

	In the Delivery section below the Address field is Gift Order and a checkbox . If this order is a gift and the customer would like a note added to the order, click the checkbox .
	The Gift Message field is displayed. In the corner of the field is 250. This number represents the maximum number of characters that can be entered.
	Click inside the field and type your message. The number will decrease to let you know when you are close to the limit.

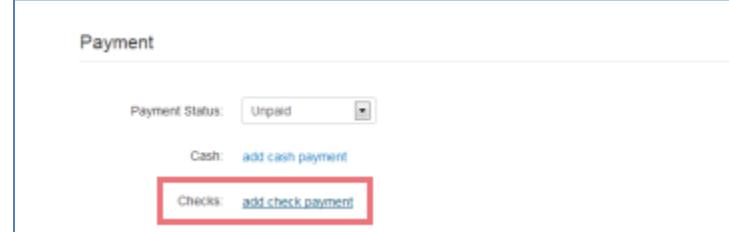
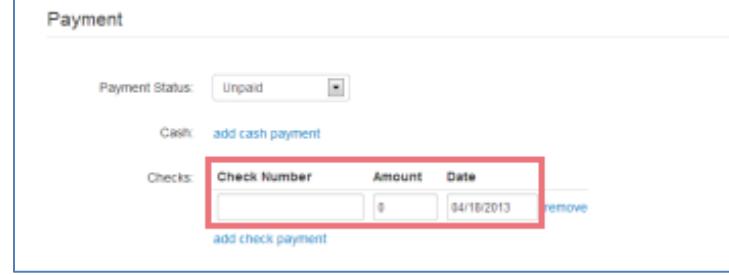
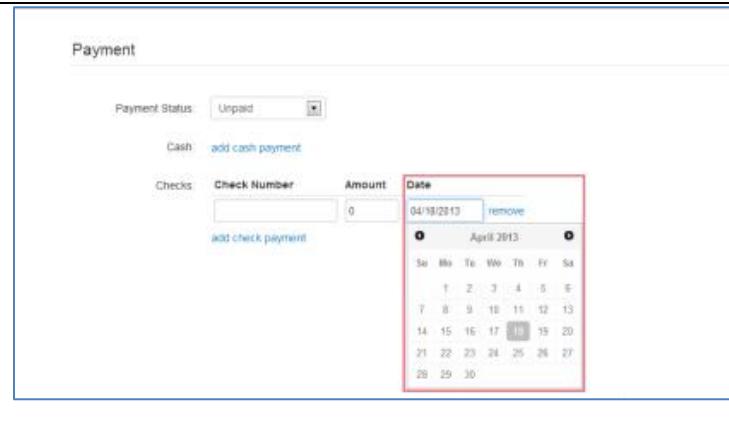
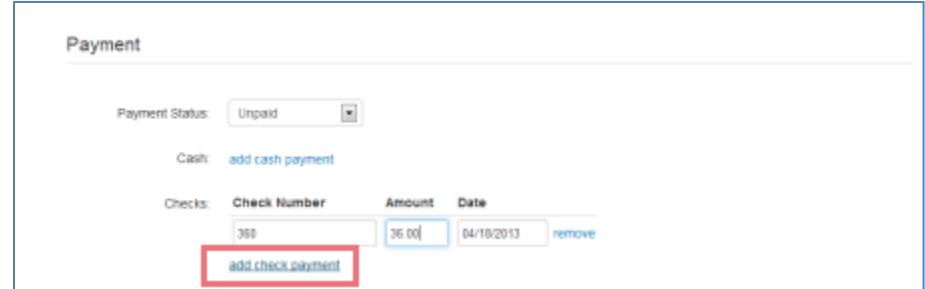
How to Add a Cash or Check Payment for an Order

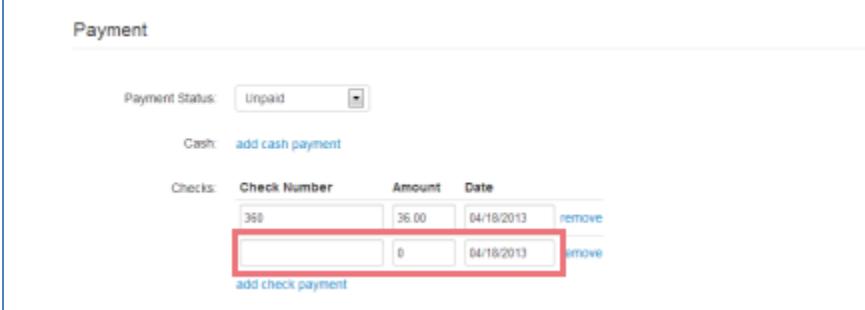
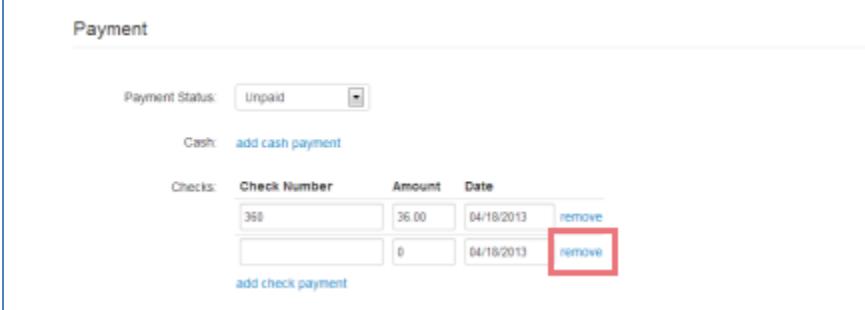
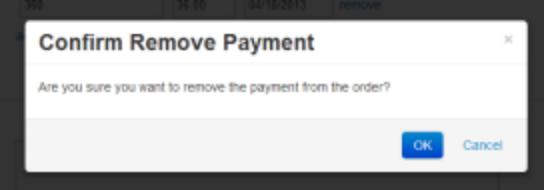
Cash Payment

	To enter a payment for an order, go to the Payment section of the New Sales Ticket page.
	There are 2 payment statuses, Partially Paid and Fully Paid . Choose the payment status from the Payment Status drop-down menu.
	There are 2 methods of payment, Check and Cash . A customer can pay using only cash, only a check or a combination of both. Select the appropriate payment type by clicking either the link “ Add cash payment ” or “ Add check payment .”
	Click “add cash payment.” The Amount and Date fields display.

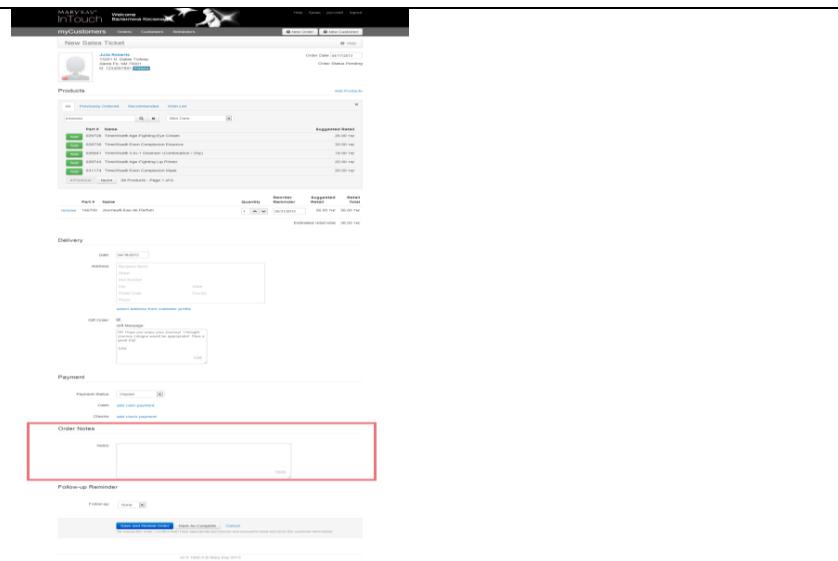
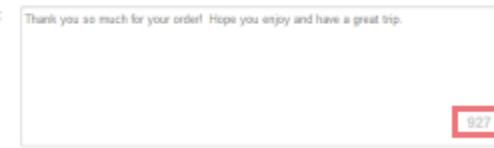
 <p>A screenshot of the "Payment" screen. It shows a table with one row for a cash payment. The fields are: Cash, Amount (36.00), Date (04/17/2013). Below the table is a "Date" button with a calendar icon, which has been clicked to open a calendar window. The calendar shows the month of April 2013. A red box highlights the date "04/17/2013" in the calendar grid.</p>	<p>For your convenience the current date is displayed in the Date field.</p> <p>To change the date, click inside the Date field. A calendar automatically displays. Choose the correct date. The date is immediately displayed in the Date field.</p>
 <p>A screenshot of the "Payment" screen. It shows a table with one row for a cash payment. The fields are: Cash, Amount (36.00), Date (04/17/2013). Below the table is a button labeled "add cash payment" with a red box around it.</p>	<p>When you have completed entering the payment click the link, "add cash payment."</p>
 <p>A screenshot of the "Payment" screen. It shows a table with two rows for cash payments. The first row has fields: Cash, Amount (36.00), Date (04/17/2013). The second row has fields: Cash, Amount (0), Date (04/18/2013). Below the table is a button labeled "add cash payment" with a red box around it.</p>	<p>A second set of fields open to enter any additional payments.</p>
 <p>A screenshot of the "Payment" screen. It shows a table with two rows for cash payments. The first row has fields: Cash, Amount (36.00), Date (04/17/2013) with a "remove" link. The second row has fields: Cash, Amount (0), Date (04/18/2013) with a "remove" link. Below the table is a button labeled "add cash payment" with a red box around it.</p>	<p>To remove a payment, click Remove.</p>
 <p>A screenshot of a confirmation dialog box titled "Confirm Remove Payment". The message inside says "Are you sure you want to remove the payment from the order?". At the bottom are two buttons: "OK" (highlighted with a red box) and "Cancel".</p>	<p>A confirmation screen displays. Click OK to continue and remove the payment. Click Cancel if you choose not to remove the payment.</p>

Check Payment

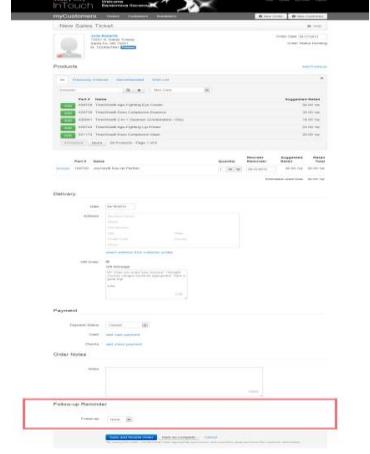
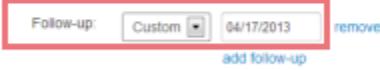
	To enter a payment by check, click the link, " add check payment. "
	The Check Number , Amount and Date fields are displayed. Enter the check number and amount in the appropriate fields.
	For your convenience the current date is displayed in the Date field. To change the date click inside the Date field. A calendar automatically displays. Choose the correct date. The date is immediately displayed in the Date field.
	After the payment information has been entered, click the link, " add check payment. "

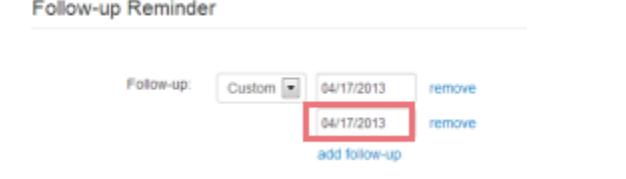
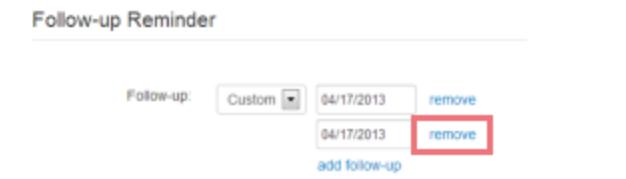
	<p>A second set of fields open to enter any additional payments.</p>
	<p>To remove a payment, click Remove.</p>
	<p>A confirmation screen displays. Click OK to continue and remove the payment. Click Cancel if you choose not to remove the payment.</p>

How to Add Notes to an Order

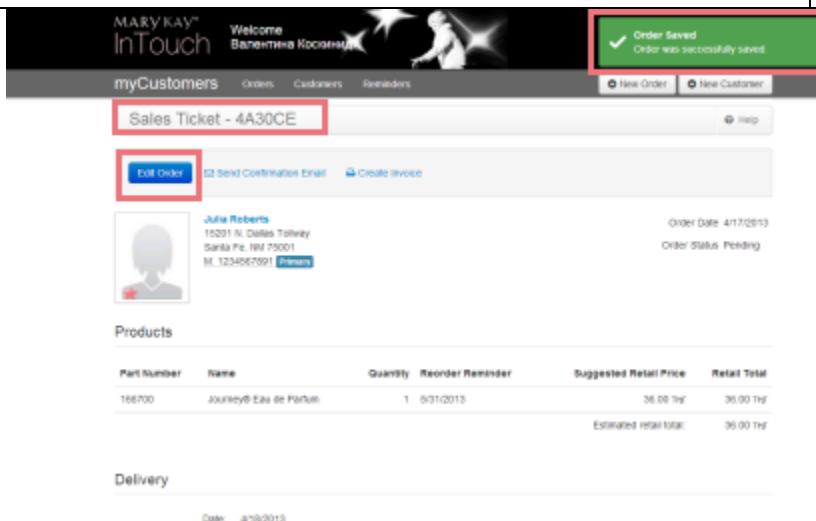
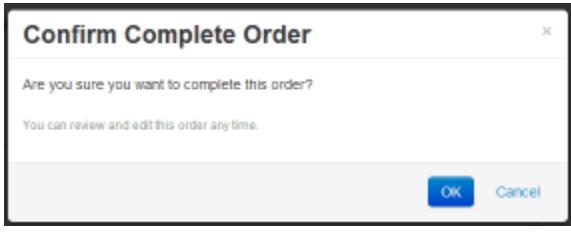
	<p>In the Notes section, you can add a note to your customer that will be included on the invoice.</p>
<p>Order Notes</p> <p>Notes:</p> 	<p>To add notes, click inside the Notes field and enter the note.</p> <p>In the corner of the field is 1000. This number represents the maximum number of characters allowed.</p>
<p>Order Notes</p> <p>Notes:</p> 	<p>Click inside the field and type your message. The number will decrease to let you know when you are close to the maximum limit.</p>

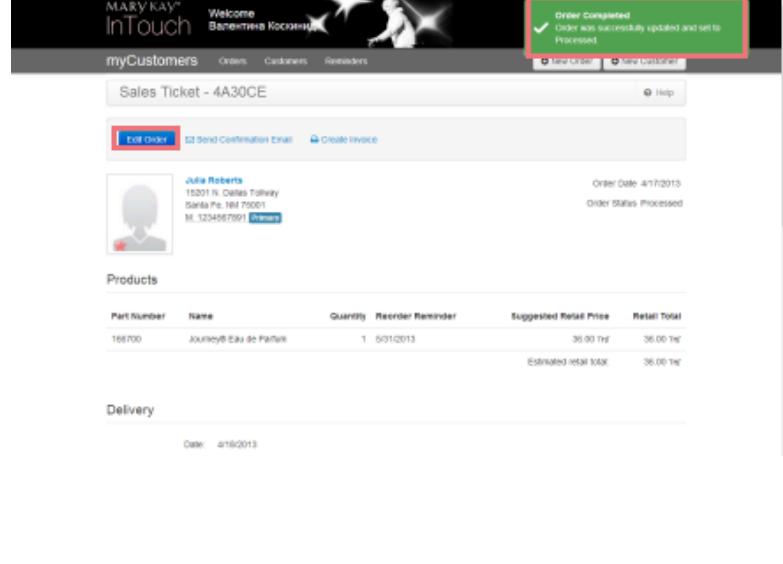
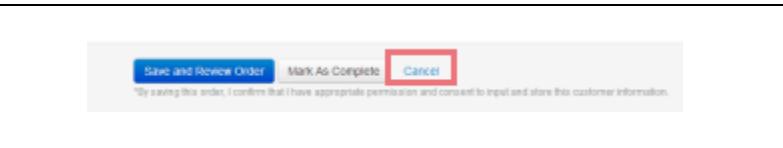
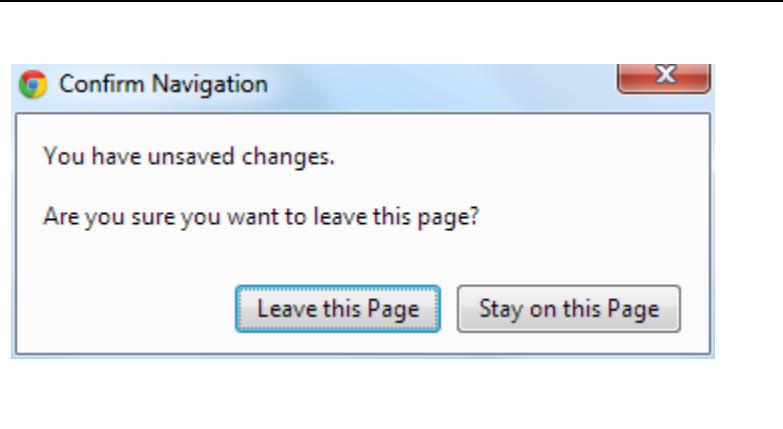
How to Add a Follow-Up Reminder

	<p>Setup a Follow-Up Reminder to help you to remember when to follow up with your customer concerning her product purchase.</p>
<p>Follow-up Reminder</p> 	<p>Follow-up reminder options are None, 2+2+2 and Custom.</p> <p>Click the down arrow to select the follow-up option.</p>
<p>Follow-up Reminder</p> 	<p>To use a preset reminder, choose the 2+2+2 option. When you choose the follow-up reminder for 2+2+2 you will automatically receive 3 reminders to follow-up with your customer. The first reminder is 2 days after the date of the order, the second is 2 weeks following the order date and the third reminder is 2 months following the order date.</p>
<p>Follow-up Reminder</p> 	<p>To setup a custom follow-up reminder, select the Custom option. A date field opens with the current date.</p>
<p>Follow-up Reminder</p>  	<p>Choose to use the current date or change the date by clicking inside the Date field. A calendar displays. Select a date from the calendar.</p>

	<p>To add another follow-up reminder, click the link, “add follow-up.”</p>
	<p>Another Date field is displayed to set another reminder. Change the date as described above. Additional reminders can be added using the same method described above..</p>
	<p>To remove a follow-up reminder, click Remove.</p>
	<p>A confirmation screen displays. To remove the reminder, click Ok. If you choose not to remove the reminder, click Cancel.</p>

How to Save, Complete or Cancel an Order

	To save the order and complete it later, click the Save and Review Order button. The order is saved and the Review Order page displays.
	A confirmation displays on the Review Order page confirming the order was saved successfully.
	An Order Number is assigned to the order.
	To reopen the order and continue working, click Edit Order .
	Once the order is complete, click Mark As Complete .
	A confirmation screen displays to confirm you want to complete the order. Click Ok to continue and complete the order. Click Cancel if you don't want to complete the order. Note: You can review and edit the order any time.

	<p>A confirmation displays on the Review Order page confirming the order was successfully completed.</p> <p>An Order Number is assigned to the order.</p> <p>The status has been changed from Pending to Processed.</p> <p>To reopen the order and make changes, click the Edit Order button.</p>
	<p>To cancel the order, click Cancel.</p>
	<p>A confirmation screen displays confirming that the changes have not been saved and you do want to leave the page. To continue and cancel the order click Leave this Page. To stay on the page and not cancel the order, click Stay on this Page.</p>

How to Review A Order

The screenshot shows the Mary Kay InTouch software interface. At the top, there's a navigation bar with links for 'Welcome', 'Logout', 'Logout', 'myCustomers', 'Orders', 'Customers', 'Reminders', 'New Order', and 'New Customer'. Below the navigation is a header for 'Sales Ticket - A7B671'. The main area contains sections for 'Products', 'Delivery', and 'Payment'. Under 'Products', there's a table with two items:

Part Number	Name	Quantity	Reminder	Suggested Retail Price	Retail Total
700111	Mary Kay® Acne Systems Trial-size Set	1		0.00/hr	0.00/hr
844493	Mary Kay® Last Love™ Lipgloss/Mascara Back	2		10.00/hr	20.00/hr

Under 'Delivery', the address is listed as '15201 N Dallas Tollway Santa Fe, NM 87501'. Under 'Payment', the status is 'Unpaid' and the payment method is 'Cash - 20.00/hr - 4/18/2013'.

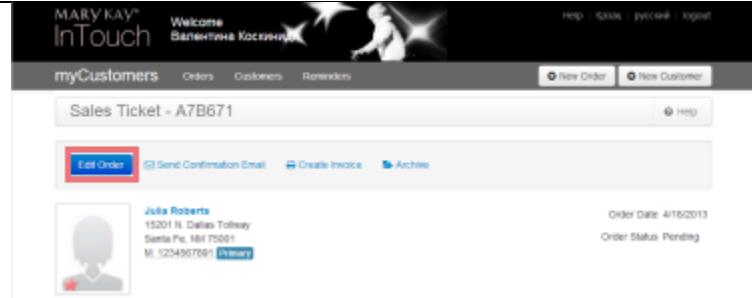
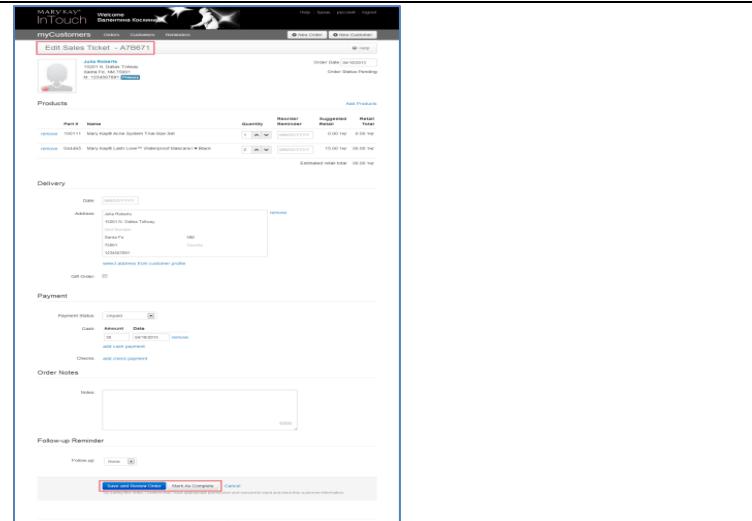
Clicking Save and Review or Mark as Complete opens the **Review Order** page.

The **Review Order** page gives you an opportunity to review the order to be sure it is correct and ready.

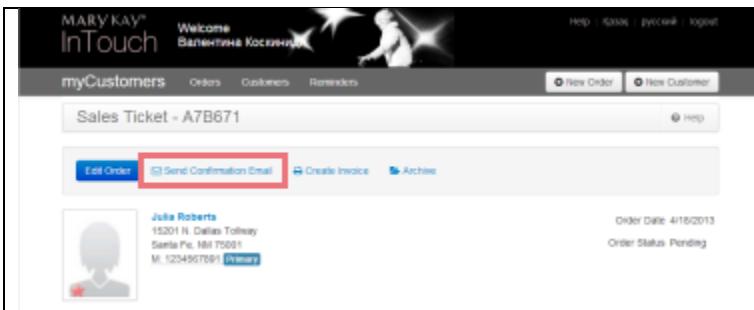
If the **Save and Review** button was used, the status on the **Review Order** page is **Pending**.

If the **Mark as Complete** button was used, the status on the **Review Order** page is **Processed**.

How to Make Changes to an Order

	<p>Click Edit Order to make changes to the order.</p>
	<p>The Edit Sales Ticket page opens. Once you are finished making changes, click the Save and Review or Mark as Complete button to save your changes and go to the Review Order screen.</p>

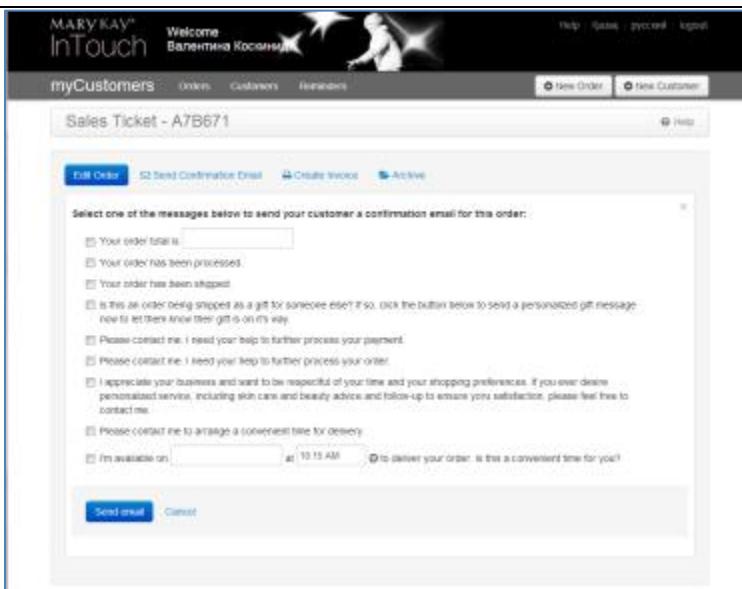
How to Send a Confirmation Email



The screenshot shows the Mary Kay InTouch software interface. At the top, there's a navigation bar with links for Help, Status, myCustomer, and Logout. Below that is a sub-navigation bar with links for myCustomers, Orders, Customers, and Rewards. A banner at the top features the Mary Kay logo and the text "Welcome Валентина Косынка". The main content area displays a sales ticket for "Sales Ticket - A7B671". On the left, there's a customer profile for "Julee Roberts" with an address: 15201 N. Dallas Tollway, Suite Pk. #6175881, M. 1234567891. To the right, it shows "Order Date: 4/16/2013" and "Order Status: Pending". Below the profile, there are buttons for Edit Order, Send Confirmation Email (which is highlighted with a red box), Create Invoice, and Archive.

It's easy to let the customer know the status of her order or that you need additional information.

Click **Send Confirmation Email** to send an email to the customer.



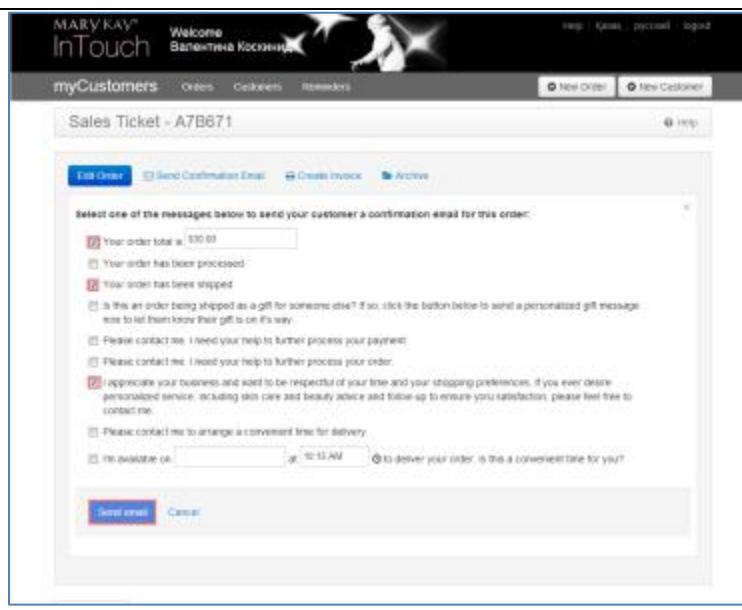
This screenshot shows the "Send Confirmation Email" dialog box. It starts with the message "Select one of the messages below to send your customer a confirmation email for this order:". Below this, there's a list of checkboxes for different messages:

- Your order total is: \$30.00
- Your order has been processed.
- Your order has been shipped.
- Is this an order being shipped as a gift for someone else? If so, click the button below to send a personalized gift message now to let them know their gift is on its way.
- Please contact me. I need your help to further process your payment.
- Please contact me. I need your help to further process your order.
- I appreciate your business and want to be respectful of your time and your shopping preferences. If you ever desire personalized service, including skin care and beauty advice and follow-up to ensure your satisfaction, please feel free to contact me.
- Please contact me to arrange a convenient time for delivery.
- I'm available on: to deliver your order. Is that a convenient time for you?

At the bottom of the dialog box are two buttons: "Send Email" and "Cancel".

The **Confirmation Email** screen displays.

Click the **checkbox** to select one or more of the messages to be included in the confirmation email.

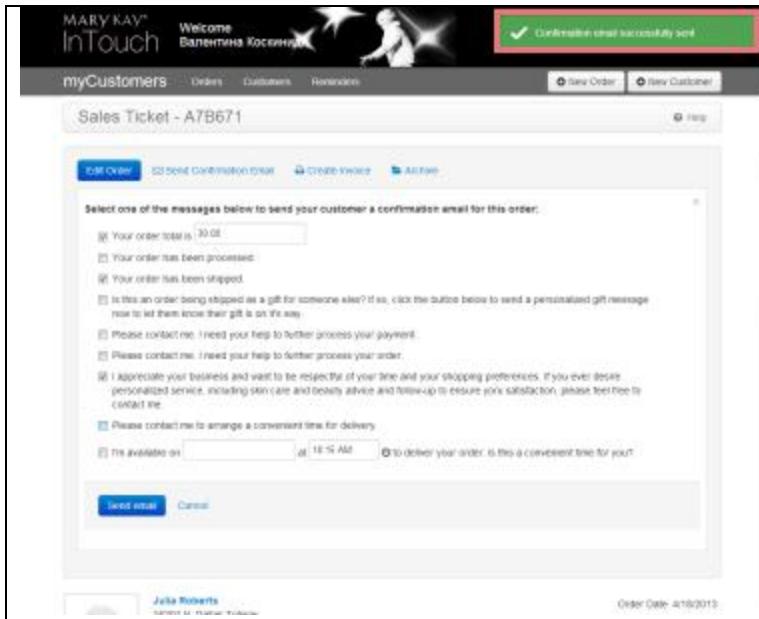


This screenshot shows the same "Send Confirmation Email" dialog box as the previous one, but with several checkboxes checked:

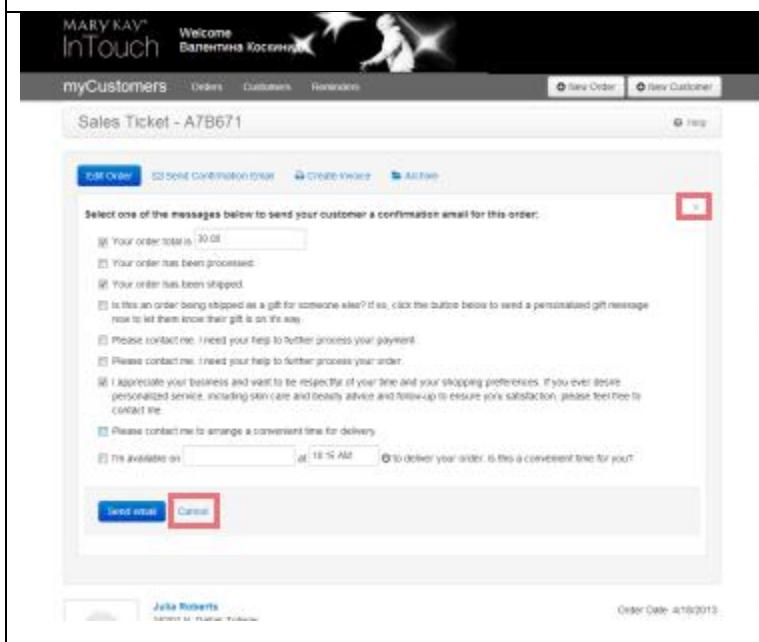
- Your order total is: \$30.00
- Your order has been processed.
- Your order has been shipped.
- Is this an order being shipped as a gift for someone else? If so, click the button below to send a personalized gift message now to let them know their gift is on its way.
- Please contact me. I need your help to further process your payment.
- Please contact me. I need your help to further process your order.
- I appreciate your business and want to be respectful of your time and your shopping preferences. If you ever desire personalized service, including skin care and beauty advice and follow-up to ensure your satisfaction, please feel free to contact me.
- Please contact me to arrange a convenient time for delivery.
- I'm available on: to deliver your order. Is that a convenient time for you?

At the bottom of the dialog box are two buttons: "Send Email" and "Cancel".

Click **Send Email** to send the confirmation email to the customer.



A confirmation displays confirming the email was sent successfully.



To cancel the confirmation email before it has been sent, click **Cancel**.

Note: Once the email has been sent there is no way to cancel it.

Close the **Confirmation Email** screen by click the “X”

How to Create an Invoice

	<p>To create an invoice for the order, click Create Invoice.</p>
	<p>The Create Invoice screen displays. You have the option to create the invoice in a PDF or Excel format. Note: If the invoice is created in a PDF format it <i>will not</i> be editable. Choose the radio button beside the format you wish to use.</p>
	<p>A message from you to the customer or a gift message from the customer to the recipient can be included on the invoice. To include a message to the customer or a gift message, click the appropriate link.</p>

MARY KAY®
InTouch

Welcome
Валентина Косинки

Help | Logout | [Logout](#)

myCustomers Orders Customers Reminders

[New Order](#) [New Customer](#)

Sales Ticket - A7B671 [Help](#)

[Edit Order](#) [Send Confirmation Email](#) [Create Invoice](#) [Archive](#)

Format PDF
 Excel

Invoice Message:

remove 250

Gift Message: [add gift message](#)

[Create Invoice](#) [Cancel](#)

*Order total, shipping, tax and tax will only be credited your invoice on your computer.

The **Message** box is displayed. Up to 250 characters can be entered.

Sales Ticket - A7B671

[New Order](#) [New Customer](#) [Help](#)

Print Order [Send Confirmation Email](#) [Create Invoice](#) [Archive](#)

Format: PDF
 EXE

Vehicle Message:

Notes:

Gift Message: [add gift message](#)

[Cancel](#)

Copyright © 2009 Mary Kay Inc. All rights reserved. Mary Kay® is a registered trademark of Mary Kay Inc.

As the message is entered, the number in the right corner counts down the remaining number of characters available for the message.

When you are ready, click **Create Invoice**.

Sku By Product Name		Date To John Doe 123 Main St. Santa Fe, NM 87501
Qty	Product Name	Price! Amount!
1	Many Hands Home System Trial-Size Set CombinationClip	1.00 per 1.00 per
2	Many Hands Leak-Lock™ Waterproof Measures in Black	15.00 per 30.00 per

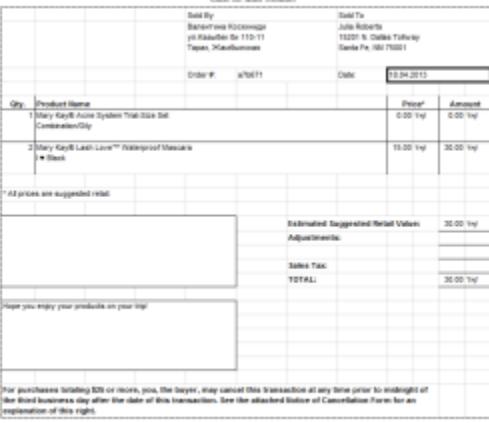
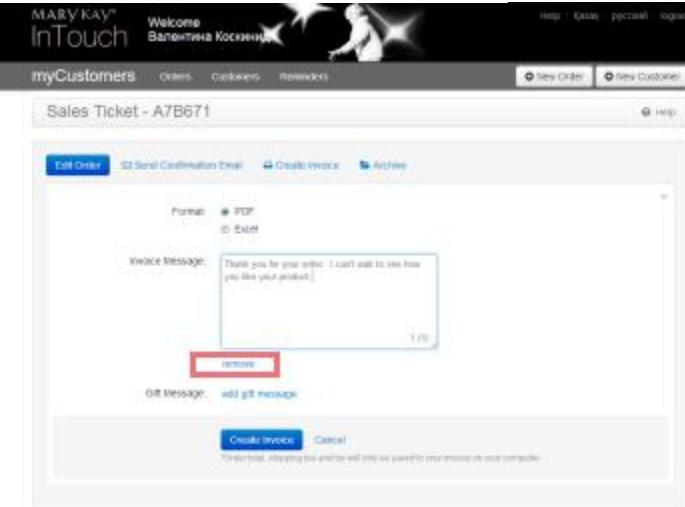
100% prices are suggested retail.

Thank you for your order. I can't wait to see how you like your product.	Estimated Suggested Retail Value: Advertisements: Sales Tax: TOTAL:	88.00 per

For purchases totaling \$49 or more, you, the buyer, may cancel this transaction at any time prior to midnight of the third business day after the date of this transaction. See the attached Notice of Cancellation Form for an explanation of this right.

The invoice is created and available to open and print.

This is the PDF version of the invoice with a note from the Independent Beauty Consultant to the customer.

 <p>This is the Excel version of the invoice with a gift message included.</p>	 <p>To remove a message, click Remove and the field closes and the message is removed.</p>
---	---

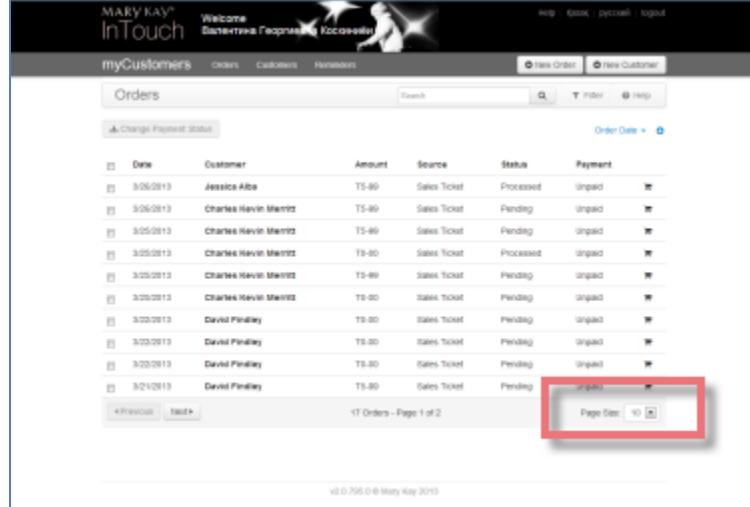
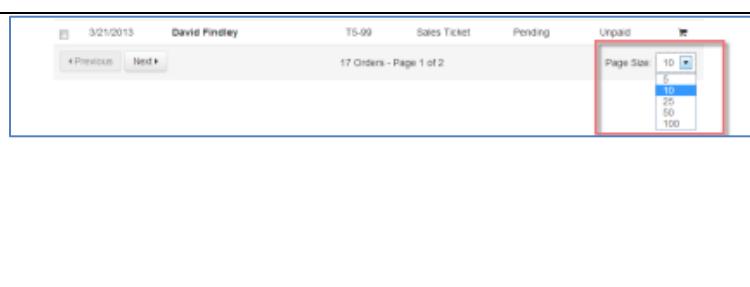
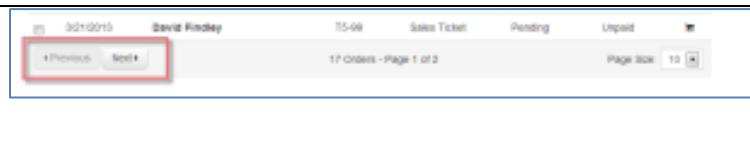
Orders Page

The screenshot shows the Mary Kay InTouch myCustomers Orders page. At the top, there's a navigation bar with links for Help, Logout, myCustomer, Orders, Customers, Vendors, New Order, and New Customer. Below the navigation is a search bar and a date filter section labeled 'Order Date'. The main content area displays a table of orders with columns for Date, Customer, Amount, Source, Status, and Payment. The table lists 17 entries, mostly from Charles Kevin Merritt, with amounts ranging from \$5.00 to \$5.99 and various statuses like Processed, Pending, and Unpaid. At the bottom of the table, there are buttons for 'Previous' and 'Next', and a note indicating '17 Orders - Page 1 of 2'. The page footer includes the version information 'v2.0.705.0-B Mary Kay 2013'.

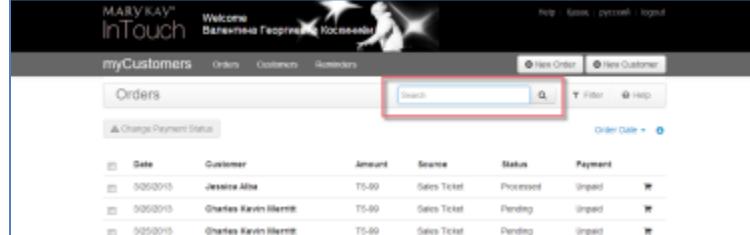
On the **Orders** page you can,

- [Orders Page Overview](#)
- [Search](#)
- [Advanced Search](#)
- [Filter orders based on pre-defined criteria such as, Order Date, Order Status, Order Source, Payment Status or Archived.](#)
- [Change Payment Status of an order to Unpaid, Partially Paid or Fully Paid](#)
- [Archive orders you no longer want on your order list.](#)
- [View your Archived Order List](#)
- [Sort the order list by, Order Date, Order Status, Order Source, Payment Status and Archived or Amount](#)
- [Open an existing order](#)

Orders Page Overview

	<p>The default number of customers orders displayed on each page is 10.</p>
	<p>Change the number of orders displayed, on a page, by clicking the down arrow by the Page Size field and selecting the number. The maximum number of orders displayed on a page is 100.</p>
	<p>Click the Previous and Next buttons to move between pages</p>

How to Search on the Orders Page

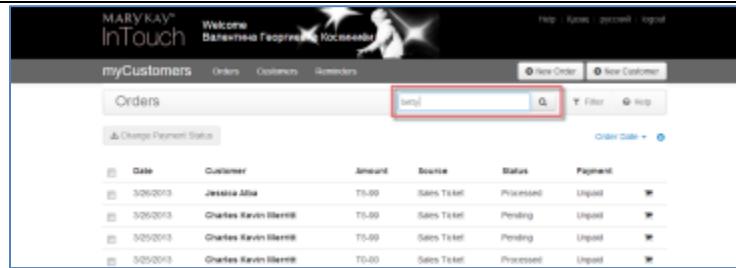


This screenshot shows the 'Orders' page of the myCustomers system. At the top, there's a navigation bar with links for 'Help', 'Logout', and 'myCustomers'. Below the navigation is a search bar with a placeholder 'Search' and a magnifying glass icon. A red box highlights this search bar. To the right of the search bar are buttons for 'New Order' and 'New Customer'. Underneath the search bar is a table header with columns: Date, Customer, Amount, Source, Status, and Payment. Below the header is a table containing four rows of order data.

Date	Customer	Amount	Source	Status	Payment
3/26/2013	Jessica Allie	T\$-00	Sales Ticket	Processed	Unpaid
3/26/2013	Charles Kevin Merrill	T\$-00	Sales Ticket	Pending	Unpaid
3/26/2013	Charles Kevin Merrill	T\$-00	Sales Ticket	Pending	Unpaid

myCustomers provides a variety of search options you can use to find the exact information you need.

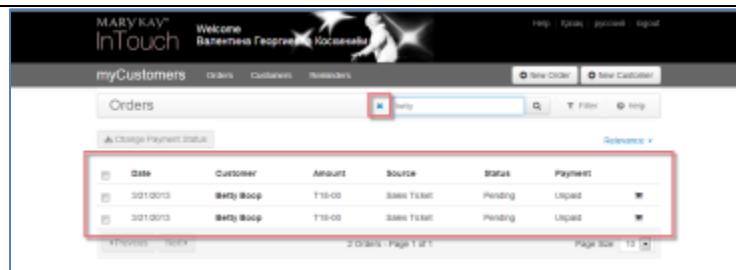
To get started, click inside the **Search** field.



This screenshot shows the same 'Orders' page as the first one, but now the search bar contains the text 'billy'. A red box highlights the search bar. The rest of the page, including the table of orders, remains the same.

Date	Customer	Amount	Source	Status	Payment
3/26/2013	Jessica Allie	T\$-00	Sales Ticket	Processed	Unpaid
3/26/2013	Charles Kevin Merrill	T\$-00	Sales Ticket	Pending	Unpaid
3/26/2013	Charles Kevin Merrill	T\$-00	Sales Ticket	Pending	Unpaid
3/26/2013	Charles Kevin Merrill	T\$-00	Sales Ticket	Processed	Unpaid

To find a specific customer's orders, type the customer name, first, last or both, and press the **ENTER** key or click the **Search Icon** (magnifying glass.)



This screenshot shows the search results for 'billy'. The search bar now has a blue 'X' button next to it, indicating it's cleared. The table below shows two results for 'Bilby Bloop'. A red box highlights the search bar again. The rest of the page, including the table of orders, remains the same.

Date	Customer	Amount	Source	Status	Payment
3/21/2013	Bilby Bloop	T\$0-00	Sales Ticket	Pending	Unpaid
3/21/2013	Bilby Bloop	T\$0-00	Sales Ticket	Pending	Unpaid

The customer's orders are displayed.

Click the blue “X” beside the **Search** field to clear it and return to the **Order List**.

How to Use the Advanced Order Search

This screenshot shows the Mary Kay InTouch software interface. At the top, there's a navigation bar with links for 'myCustomers', 'Orders', 'Customers', and 'Kneadless'. Below this is a search bar with a dropdown menu. A red box highlights the 'Filter' button in the dropdown menu, which is currently set to 'Advanced'. The main area displays a table of orders with columns for Date, Customer, Amount, Source, Status, and Payment. The status column shows various states like 'Sales Ticket', 'Pending', 'Processed', and 'Unpaid'.

Advanced Search enables you to search for orders created online or with a sales ticket and orders with a specific order or payment status within a specified date range.

To use **Advanced Search**, click **Filter**. From the drop-down menu, select **Advanced**.

This screenshot shows the 'Advanced Search' section of the Mary Kay InTouch software. The search bar at the top includes fields for 'Order Status' (with a dropdown menu open), 'Order Date' (set to 12/15/1969), and 'Payment Status' (set to Select). Below the search bar is a table of orders with columns for Date, Customer, Amount, Source, Status, and Payment. The status column shows various states like 'Sales Ticket', 'Pending', 'Processed', and 'Unpaid'.

The **Advanced Search** section is displayed.

This screenshot shows the 'Advanced Search' section of the Mary Kay InTouch software. The search bar at the top includes fields for 'Order Status' (with a dropdown menu open), 'Order Date' (set to 03/01/2013), and 'Payment Status' (set to Select). Below the search bar is a table of orders with columns for Date, Customer, Amount, Source, Status, and Payment. The status column shows various states like 'Sales Ticket', 'Pending', 'Processed', and 'Unpaid'.

In this example we will look for orders with a pending status in March.

First, click inside the **Order Status** field. A drop-down menu displays. Select pending.

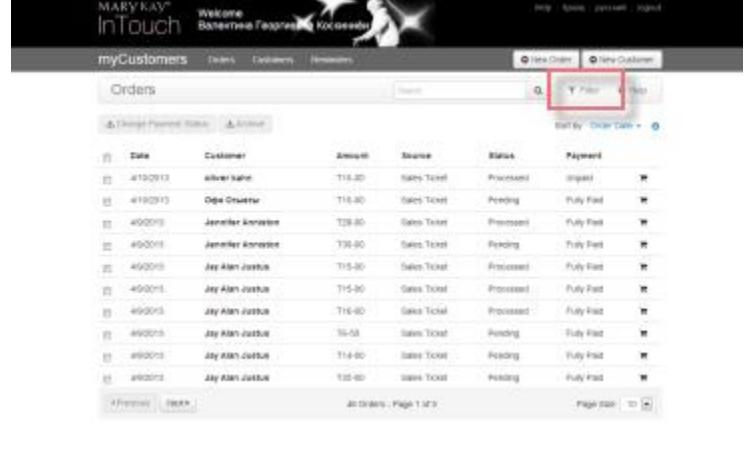
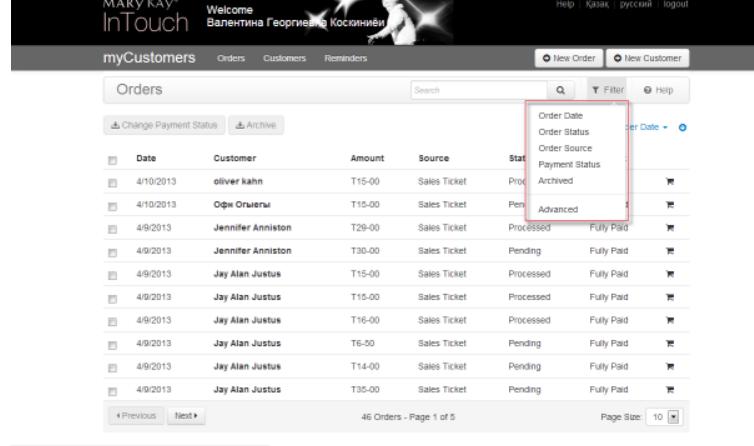
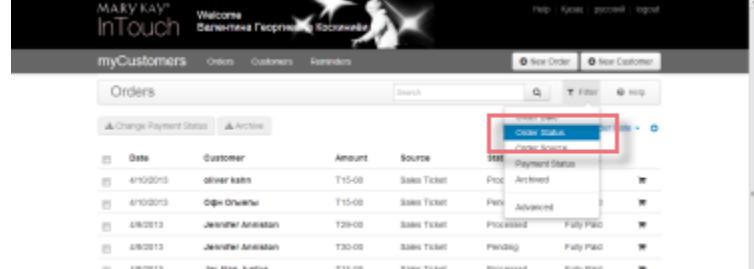
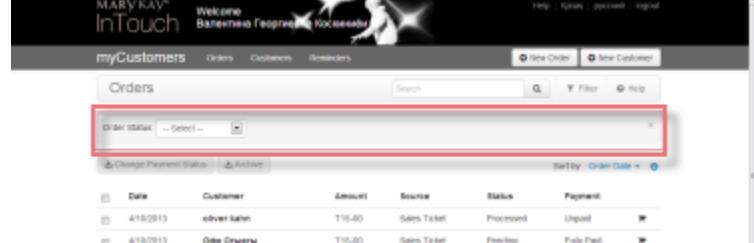
Next select a date range. Click inside the first **Order Date** field – the “beginning date” for the date range. A calendar automatically displays for the current month.

To select a different month, click the arrows at the top of the calendar to scroll the months.

To select a specific day, click the day. For this example we selected a date range of the 1-30th of March.

<p>The screenshot shows the MARY KAY InTouch software interface. At the top, there's a navigation bar with links for Help, Logout, myCustomers, Orders, Customers, and Remedies. Below this is a sub-navigation bar for Orders, featuring buttons for New Order, New Customer, and Help. The main area is titled 'Orders' and includes a search bar with fields for Order Source, Order Date (set to 3/01/2013 to 3/31/2013), Order Status (set to Pending), and Payment Status (set to Unpaid). A red box highlights the close ('X') button in the top right corner of the search panel. Below the search panel is a table with columns: DATE, CUSTOMER, AMOUNT, SOURCE, STATUS, and PAYMENT. The table lists ten orders, all of which are pending and unpaid. The first few rows are highlighted with a red background.</p>	<p>Immediately the March orders with a pending order status are displayed</p> <p>To close the Advanced Search section, click the “X” in the upper right hand corner and you are automatically returned to the original order list.</p>
---	---

How to Filter Orders

	<p>Use the Filter on the Orders page to quickly sort orders into a specified category.</p> <p>To begin, click Filter.</p>
	<p>A drop-down menu displays.</p> <p>Select one of the following categories from the list; Order Date, Order Status, Order Source, Payment Status, or Archived.</p>
	<p>For this example we have selected "Order Status".</p>
	<p>The Order Status field displays.</p> <p>Click the down arrow to select a status.</p>

The screenshots illustrate the process of filtering orders by status. In the top screenshot, the 'Pending' status is selected in the dropdown menu. In the bottom screenshot, the 'Pending' status has been removed from the dropdown, and the list of orders no longer includes any pending items.

For this example, we have selected "Pending".

A list of customers who have orders with a "Pending" order status is displayed.

Click the "X" to close the **Order Status** field and return to the original order list.

How to Change the Payment Status of an Order

The screenshot shows the 'Orders' screen in the MARY KAY InTouch software. At the top, there are buttons for 'New Order' and 'New Customer'. Below that is a search bar and a filter button. The main area displays a table of orders with columns: Date, Customer, Amount, Source, Status, and Payment. The 'Payment' column header is highlighted with a red box. The table lists various customers with their transaction details. A red box also highlights the 'Change Payment Status' button located above the table.

You can easily change the payment status for one or more orders.

To activate the **Change Payment Status** button and change the status for one or more orders, click the **checkbox** beside the order or orders that need a status change.

Click the **Change Payment Status** button.

This screenshot shows the 'Change Payment Status' dialog box overlaid on the main Orders screen. The dialog box has a title 'Select the new payment status to complete this action.' It contains a dropdown menu labeled 'New status' with three options: 'Unpaid', 'Partially Paid', and 'Fully Paid'. The 'Fully Paid' option is highlighted with a red box. The background table of orders is visible through the dialog box.

The **Payment Status Bar** displays.

To view the payment status options, click the arrow for the **New Status** drop-down menu.

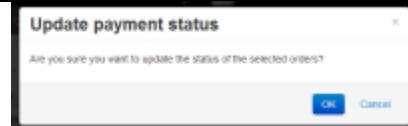
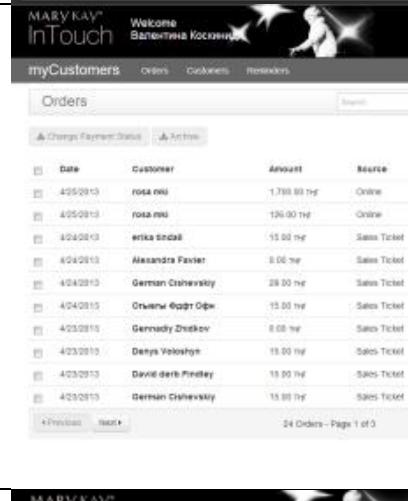
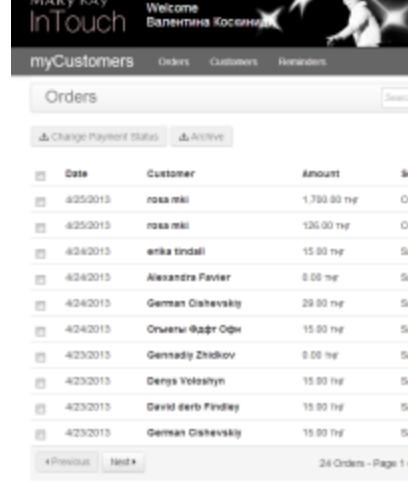
The payment options are:

- Unpaid
- Partially Paid
- Fully Paid

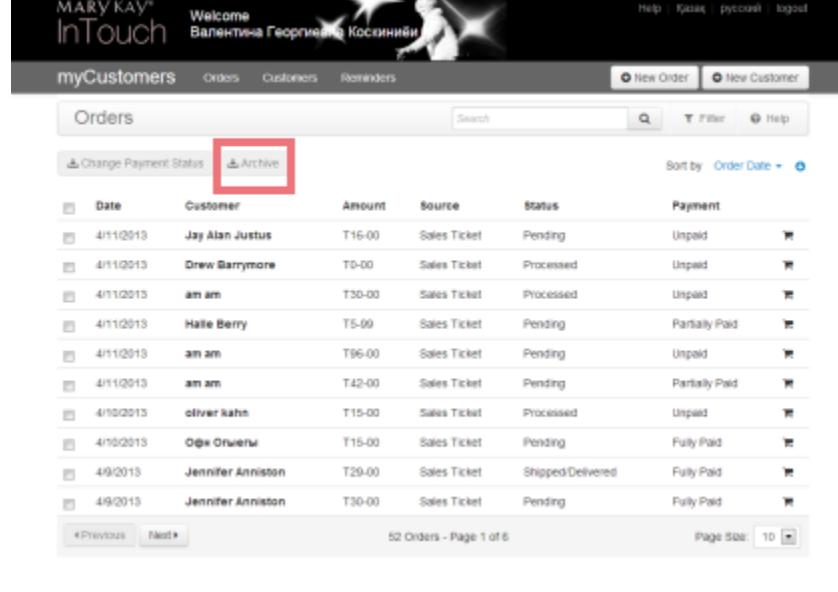
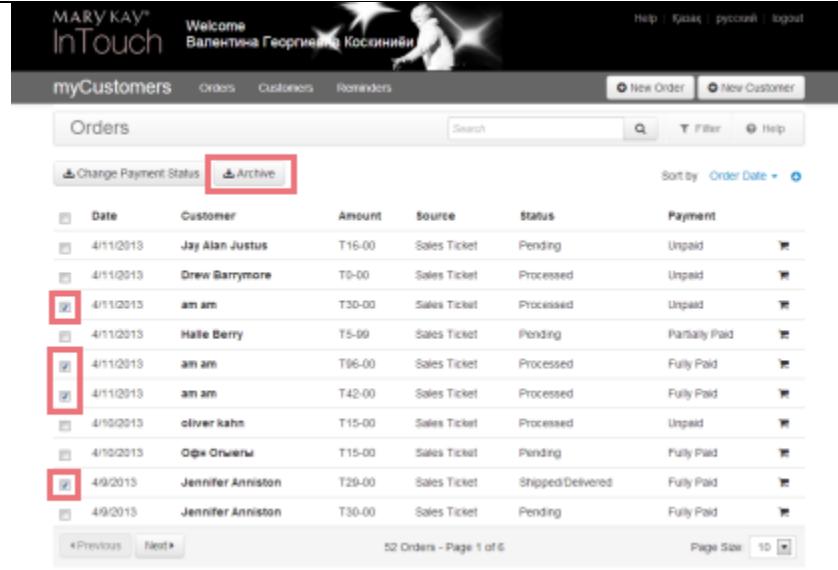
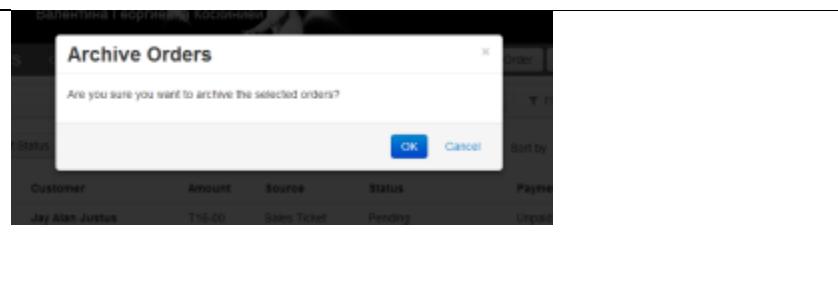
This screenshot shows the 'Change Payment Status' dialog box again. The 'New status' dropdown now shows 'Fully Paid'. Below it are 'Save' and 'Cancel' buttons, with 'Save' highlighted with a red box. The background table of orders is visible.

For this example we will select Fully Paid.

Click **Save**.

		<p>A Confirmation screen displays to confirm that we really do want to change the payment status for the selected orders.</p>
		<p>The Save is completed but the payment status appears not to have changed. To see the change you must leave and return to this page or click the Refresh icon  located at the top of the browser.</p>
		<p>After the page is refreshed the changes are displayed.</p>

How to Archive Orders

 <p>The screenshot shows the 'Orders' screen in the Mary Kay InTouch software. At the top, there's a navigation bar with 'myCustomers', 'Orders', 'Customers', and 'Reminders'. Below that is a search bar and a 'New Order' button. The main area is titled 'Orders' and contains a table with columns: Date, Customer, Amount, Source, Status, and Payment. The table lists various orders from April 11, 2013, to April 10, 2013, for customers like Jay Alan Justus, Drew Barrymore, and Halle Berry. The 'Archive' button is located at the top right of the table area, with a red box drawn around it.</p>	<p>Archiving orders is a great way to manage orders that are complete and required no additional work.</p>
 <p>This screenshot shows the same 'Orders' screen as above, but with several checkboxes checked next to specific order rows. A red box highlights the 'Archive' button again. The table data is identical to the first screenshot.</p>	<p>To archive one or more orders, click the checkbox beside each of the orders you want to archive. Click the Archive button</p>
 <p>A confirmation dialog box titled 'Archive Orders' is shown. It asks 'Are you sure you want to archive the selected orders?'. The 'OK' button is highlighted with a red box. The background shows the same 'Orders' screen with checked checkboxes.</p>	<p>A confirmation screen displays to confirm you want to archive the selected orders. Click OK to continue.</p>

The orders were successfully archived.

Date	Customer	Amount	Source	Status	Payment
4/11/2013	Jay Alan Justus	T16-00	Sales Ticket	Pending	Unpaid
4/11/2013	Drew Barrymore	T0-00	Sales Ticket	Processed	Unpaid
4/11/2013	am am	T30-00	Sales Ticket	Processed	Unpaid
4/11/2013	Halle Berry	T5-99	Sales Ticket	Pending	Partially Paid
4/11/2013	am am	T96-00	Sales Ticket	Processed	Fully Paid
4/11/2013	am am	T42-00	Sales Ticket	Processed	Fully Paid
4/10/2013	oliver kahn	T15-00	Sales Ticket	Processed	Unpaid
4/10/2013	Ольга Ольгина	T15-00	Sales Ticket	Pending	Fully Paid
4/9/2013	Jennifer Anniston	T20-00	Sales Ticket	Shipped/Delivered	Fully Paid
4/9/2013	Jennifer Anniston	T30-00	Sales Ticket	Pending	Fully Paid

52 Orders - Page 1 of 6 Page Size: 10

A confirmation screen displays to confirm the archive was successful.

The archived orders appear to still be on the page.

The archived orders will remain on the page until the page is refreshed by clicking the **Refresh** button in the browser menu or when you leave the page and return.

46 Orders - Page 1 of 5 Page Size: 10

Once the page is refreshed the archived orders are no longer on the page.

How to View Archived Orders

To view archived orders, open the order list by clicking Orders on the navigation bar.

Click Filter.

Select Archived from the drop-down menu.

The Archived selection bar displays.

Click the **checkbox** beside Archived.

Date	Customer	Amount	Source	Status	Payment
4/11/2013	Jay Alan Justus	T15-00	Sales Ticket	Pending	Unpaid
4/11/2013	Drew Barrymore	T0-00	Sales Ticket	Processed	Unpaid
4/11/2013	Halle Berry	T5-99	Sales Ticket	Pending	Partially Paid
4/10/2013	oliver kahn	T15-00	Sales Ticket	Processed	Unpaid
4/10/2013	София Овсянки	T15-00	Sales Ticket	Pending	Fully Paid
4/9/2013	Jennifer Anniston	T30-00	Sales Ticket	Pending	Fully Paid
4/9/2013	Jay Alan Justus	T15-00	Sales Ticket	Processed	Fully Paid
4/9/2013	Jay Alan Justus	T15-00	Sales Ticket	Processed	Fully Paid
4/9/2013	Jay Alan Justus	T6-50	Sales Ticket	Pending	Fully Paid

Date	Customer	Amount	Source	Status	Payment
4/11/2013	Jay Alan Justus	T15-00	Sales Ticket	Pending	Unpaid
4/11/2013	am am	T30-00	Sales Ticket	Processed	Unpaid
4/11/2013	am am	T95-00	Sales Ticket	Processed	Fully Paid
4/11/2013	am am	T42-00	Sales Ticket	Processed	Fully Paid
4/9/2013	Jennifer Anniston	T29-00	Sales Ticket	Shipped/Delivered	Fully Paid
3/26/2013	Jessica Alba	T5-99	Sales Ticket	Processed	Fully Paid

The Archived selection bar displays.

Click the **checkbox** beside Archived.

The list of archived orders automatically displays.

To close the archived order list and return to your current order list, click the “X” in the archive selection bar.

How to Sort the Order List

The screenshot shows the 'Orders' section of the MARY KAY InTouch software. At the top, there are tabs for 'Orders', 'Customers', and 'Reminders'. Below the tabs, there is a search bar and a 'Sort by' dropdown menu. The dropdown menu is open, showing options: Order Date, First Name, Last Name, Order Source, Order Status, Payment Status, and Amount. The 'Sort by' dropdown itself is also highlighted with a red box.

Date	Customer	Amount	Source	Status	Pa
4/11/2013	Jay Alan Justus	T15-00	Sales Ticket	Pending	Order Date
4/11/2013	am am	T30-00	Sales Ticket	Processed	First Name
4/11/2013	am am	T96-00	Sales Ticket	Processed	Last Name
4/11/2013	am am	T42-00	Sales Ticket	Processed	Order Source
4/9/2013	Jennifer Anniston	T29-00	Sales Ticket	Shipped/Delivered	Order Status
3/26/2013	Jessica Alba	T5-00	Sales Ticket	Processed	Payment Status

At the bottom of the list, there are buttons for 'Previous' and 'Next', and a page indicator '6 Orders - Page 1 of 1'. A 'Page Size' dropdown is also present.

By default the order list is sorted by the date that orders are received.

Sort by options include,
Order Date
First Name
Order Source
Order Status
Payment Status
Amount

To see the list, click the down arrow next to the **Sort by** field.

This screenshot is similar to the one above, showing the 'Orders' section of the MARY KAY InTouch software. The 'Sort by' dropdown menu is open, and the 'Payment Status' option is highlighted with a red box.

Date	Customer	Amount	Source	Status	Pa
4/11/2013	Jay Alan Justus	T15-00	Sales Ticket	Pending	Order Date
4/11/2013	am am	T30-00	Sales Ticket	Processed	First Name
4/11/2013	am am	T96-00	Sales Ticket	Processed	Last Name
4/11/2013	am am	T42-00	Sales Ticket	Processed	Order Source
4/9/2013	Jennifer Anniston	T29-00	Sales Ticket	Shipped/Delivered	Order Status
3/26/2013	Jessica Alba	T5-00	Sales Ticket	Processed	Payment Status

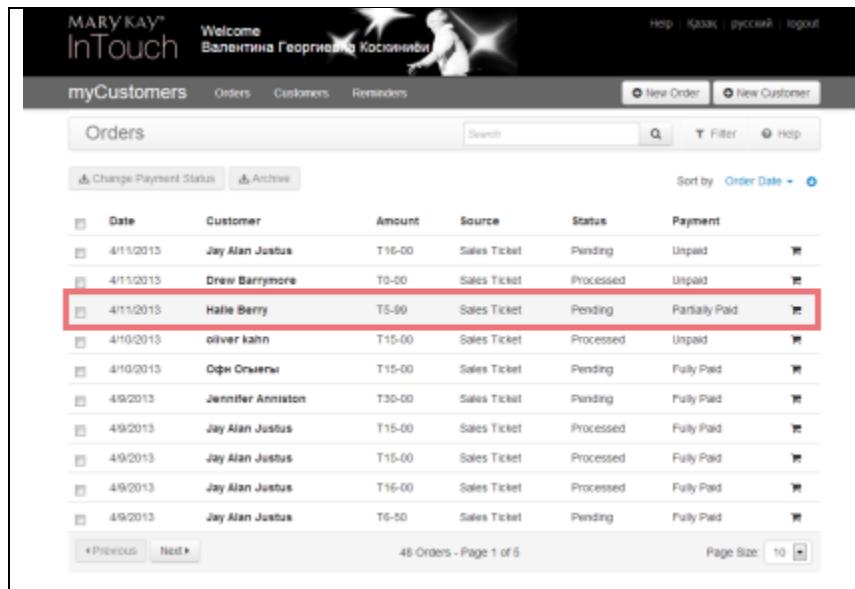
Select the sort category. For this example, we will use **Payment Status**.

This screenshot shows the 'Orders' section of the MARY KAY InTouch software. The 'Sort by' dropdown menu is set to 'Payment Status'. The 'Status' column header is highlighted with a red box. The data in the table reflects this sorting, with rows grouped by payment status: Pending, Processed, and Fully Paid.

Date	Customer	Amount	Source	Status	Payment
4/11/2013	Halle Berry	T5-00	Sales Ticket	Pending	Partially Paid
4/10/2013	oliver kahn	T15-00	Sales Ticket	Processed	Unpaid
4/11/2013	Drew Barrymore	T9-00	Sales Ticket	Processed	Unpaid
4/11/2013	Jay Alan Justus	T16-00	Sales Ticket	Pending	Unpaid
4/10/2013	Olya Olyova	T15-00	Sales Ticket	Pending	Fully Paid
4/9/2013	Jay Alan Justus	T15-00	Sales Ticket	Processed	Fully Paid
4/9/2013	Jay Alan Justus	T15-00	Sales Ticket	Processed	Fully Paid
4/9/2013	Jay Alan Justus	T16-00	Sales Ticket	Processed	Fully Paid
4/9/2013	Jay Alan Justus	T14-00	Sales Ticket	Pending	Fully Paid
4/9/2013	Jay Alan Justus	T35-00	Sales Ticket	Pending	Fully Paid

The list is automatically sorted by **Payment Status**.

How to Open an Existing Order



The screenshot shows the MARY KAY InTouch software interface. At the top, there's a banner with the text "MARY KAY® InTouch" and "Welcome Валентина Георгиевна Костюшко". On the right side of the banner are links for "Help", "Logout", and "Russian". Below the banner, there's a navigation bar with tabs for "myCustomers", "Orders", "Customers", and "Reminders". To the right of the navigation bar are buttons for "New Order" and "New Customer". The main area is titled "Orders" and contains a table with columns: Date, Customer, Amount, Source, Status, and Payment. The table lists several orders, with the row for "Halle Berry" highlighted by a red box. The table also includes sorting options ("Sort by Order Date") and filtering options ("Filter"). At the bottom of the table, there are buttons for "Previous" and "Next", and a message "46 Orders - Page 1 of 6". There's also a "Page Size" dropdown set to "10".

Date	Customer	Amount	Source	Status	Payment
4/11/2013	Jay Alan Justus	T16-00	Sales Ticket	Pending	Unpaid
4/11/2013	Drew Barrymore	T0-00	Sales Ticket	Processed	Unpaid
4/11/2013	Halle Berry	T5-00	Sales Ticket	Pending	Partially Paid
4/10/2013	oliver kahn	T15-00	Sales Ticket	Processed	Unpaid
4/10/2013	Одри Ослепая	T15-00	Sales Ticket	Pending	Fully Paid
4/9/2013	Jennifer Anniston	T30-00	Sales Ticket	Pending	Fully Paid
4/9/2013	Jay Alan Justus	T15-00	Sales Ticket	Processed	Fully Paid
4/9/2013	Jay Alan Justus	T15-00	Sales Ticket	Processed	Fully Paid
4/9/2013	Jay Alan Justus	T16-00	Sales Ticket	Processed	Fully Paid
4/9/2013	Jay Alan Justus	T6-50	Sales Ticket	Pending	Fully Paid

To open an order from the Order List is easy.

Whenever your cursor is hovering over an item on the order list, that row is automatically highlighted.

Click anywhere on the highlighted line to open the order.

Online Orders

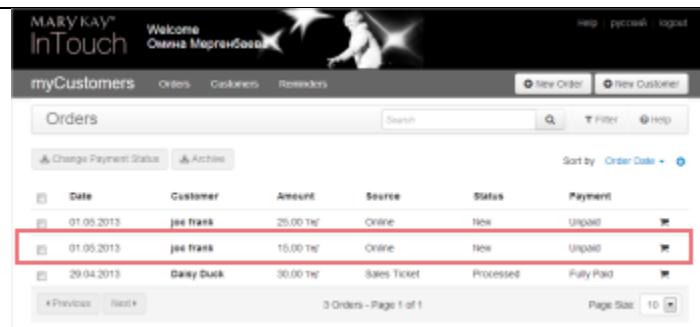
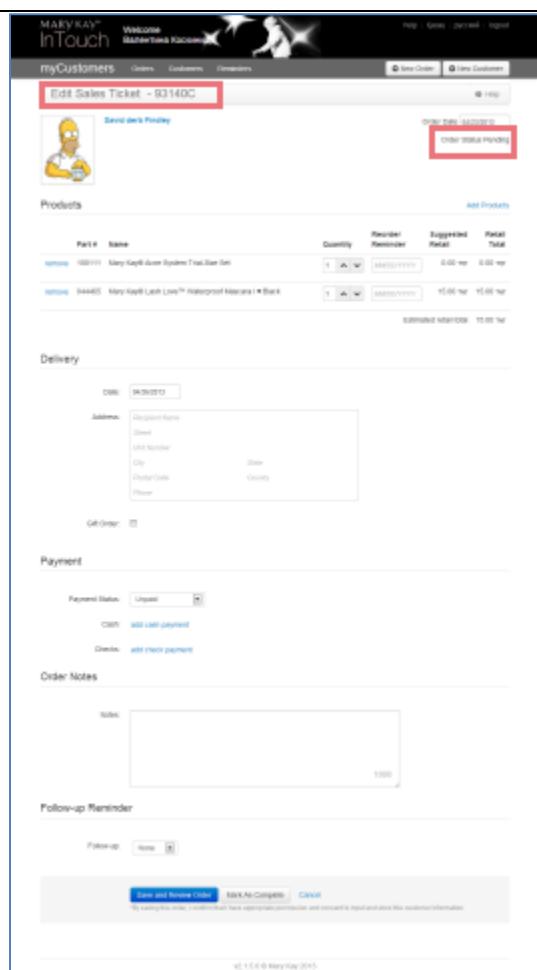
Date	Customer	Amount	Source	Status	Payment
01.05.2013	joe frank	25.00 TIR	Online	New	Unpaid
01.05.2013	joe frank	15.00 TIR	Online	New	Unpaid
29.04.2013	Daisy Duck	30.00 TIR	Sales Ticket	Processed	Fully Paid

Online orders are orders you created by your customer online in your Personal Website and submitted to you. They are displayed on the **Order List** and the source is **Online**.

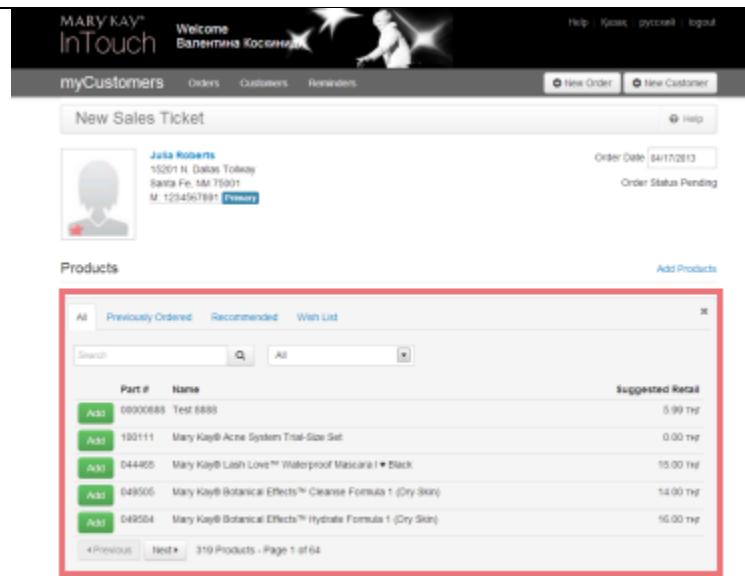
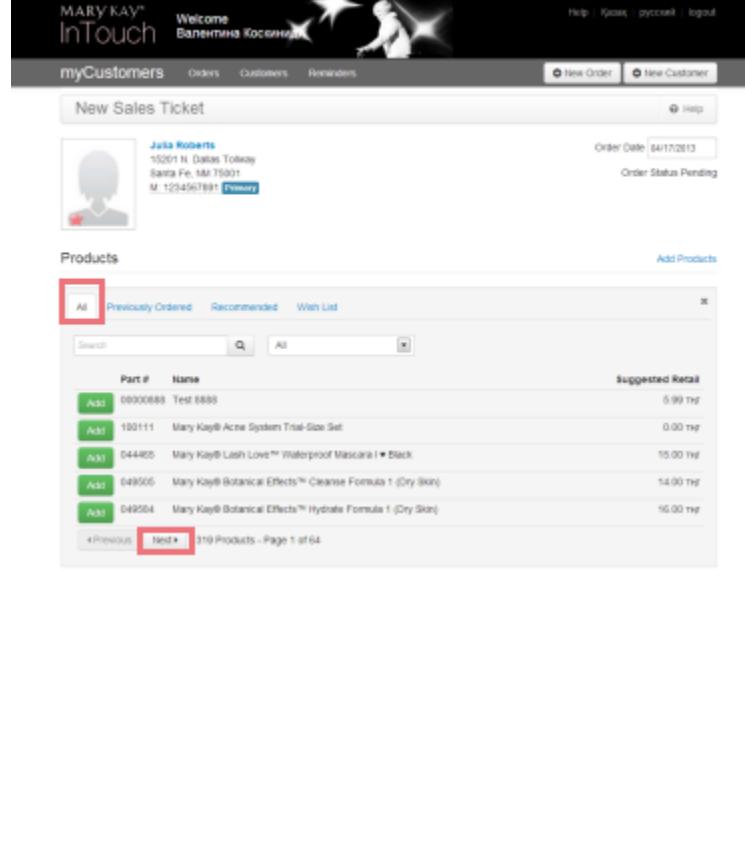
In this guide you will see how to,

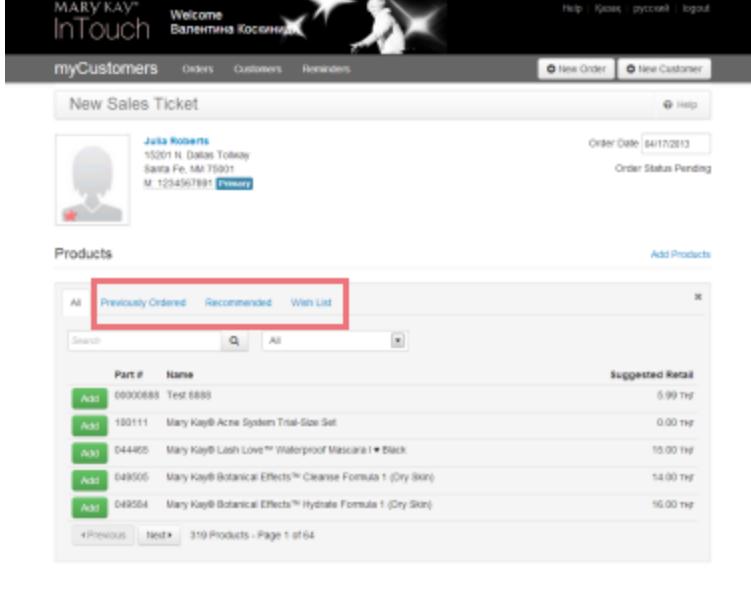
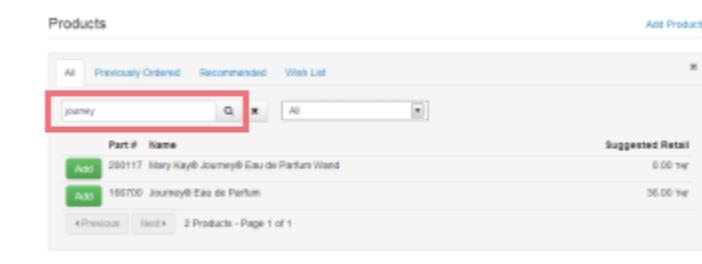
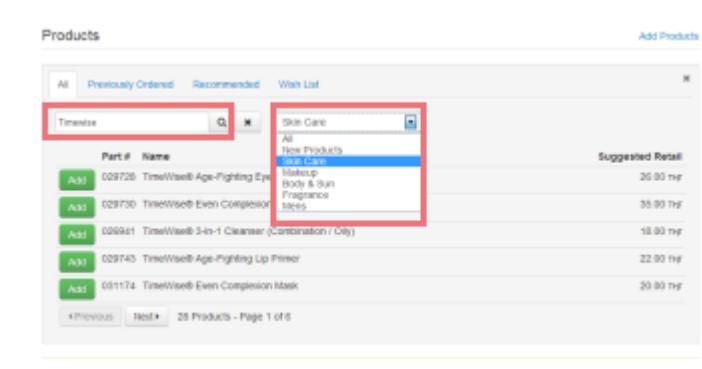
- [Get started processing an online order](#)
- [Add products to the order](#)
- [Add a reorder reminder](#)
- [Remove products](#)
- [Add or change the delivery address](#)
- [Add a gift note](#)
- [Cash or check payment](#)
 - [Cash](#)
 - [Check](#)
- [Add order notes](#)
- [Add a follow-up](#)
- [Save, Complete or Cancel the order](#)
- [Review the order](#)
- [Edit the order](#)
- [Send a confirmation email](#)
- [Create an invoice](#)

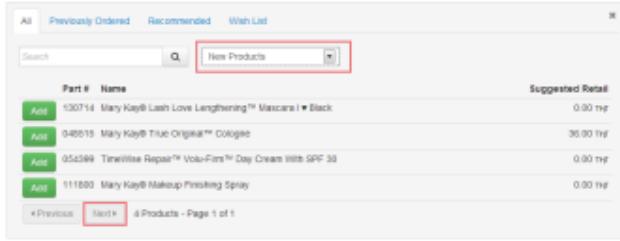
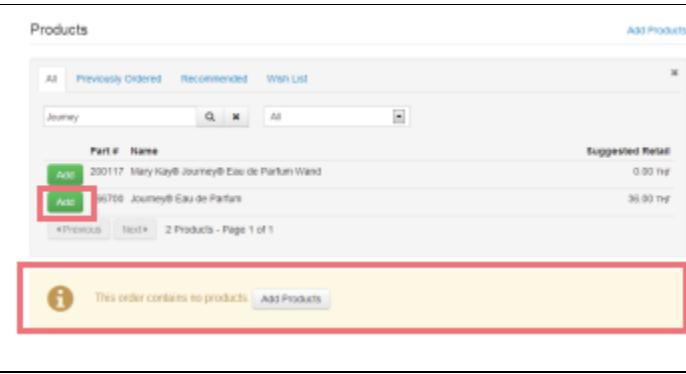
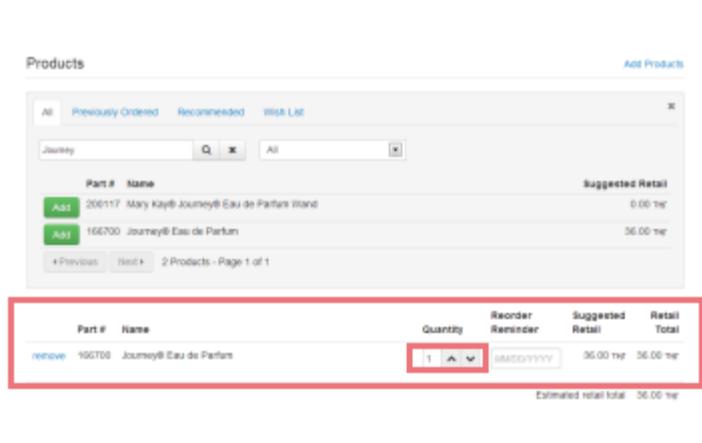
How to Process an Online Order – Getting Started

	<p>To open an order from the Order List is easy.</p> <p>Whenever your cursor is hovering over an item on the order list, that row is automatically highlighted.</p> <p>Click anywhere on the highlighted line to open the order.</p>
	<p>The Edit Sales Ticket page opens.</p> <p>Until the order is marked complete, it remains in a Pending status. The Pending status means that the order is not complete.</p> <p>Once an order is marked complete the pending status changes to Processed. The Processed status means that the order is complete but not shipped or delivered.</p> <p>Once the order has been shipped or delivered you can change the status from Processed to Shipped and Delivered.</p> <p>Note: The order can be reopened and edited at any time.</p>

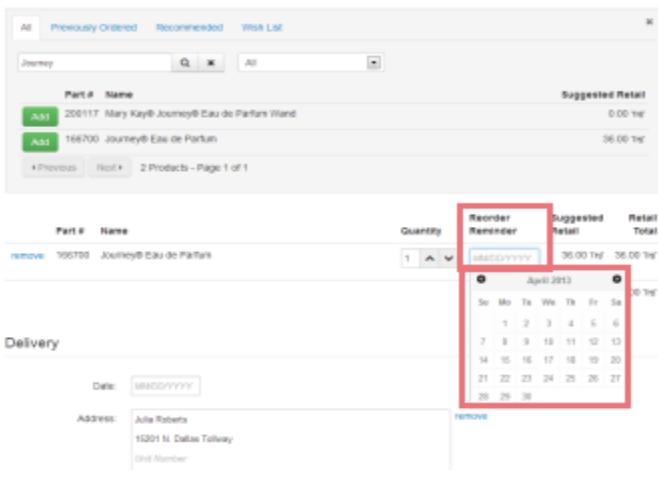
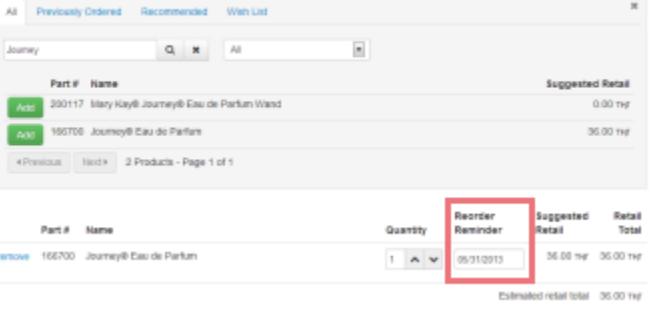
How to Add Products to an Order

	<p>It may be necessary to add additional products to the order. To add products to an existing order, click the Add Products link.</p> <p>The Products section opens.</p>
	<p>Products can be added using several methods such as</p> <ul style="list-style-type: none"> • Using the All tab to view products and scroll between pages using the Previous and Next buttons • Opening the Previously Ordered, Recommended or Wish List tabs • Searching for a specific product using Search or Search combined with the Category Filter • Search for products in a specific category by selecting a category from the Category Filter <p>All is the default view.</p> <p>When you locate the product you need, click ADD to add the product to the order.</p>

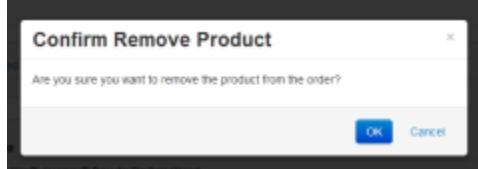
 <p>New Sales Ticket</p> <p>Jana Roberts 15201 N. Dallas Tollway Santa Fe, MI 75001 M: 1234567891 Primary</p> <p>Order Date: 04/17/2013 Order Status: Pending</p> <p>Products</p> <p>All Previously Ordered Recommended Wish List</p> <p>Search: Q All</p> <table border="1"> <thead> <tr> <th>Part #</th> <th>Name</th> <th>Suggested Retail</th> </tr> </thead> <tbody> <tr> <td>08000888</td> <td>Test 8888</td> <td>5.99 hr*</td> </tr> <tr> <td>180111</td> <td>Mary Kay® Acne System Trial-Size Set</td> <td>0.00 hr*</td> </tr> <tr> <td>044465</td> <td>Mary Kay® Lash Love™ Waterproof Mascara I • Black</td> <td>15.00 hr*</td> </tr> <tr> <td>049506</td> <td>Mary Kay® Botanical Effects™ Cleanse Formula 1 (Dry Skin)</td> <td>14.00 hr*</td> </tr> <tr> <td>049504</td> <td>Mary Kay® Botanical Effects™ Hydrate Formula 1 (Dry Skin)</td> <td>16.00 hr*</td> </tr> </tbody> </table> <p>319 Products - Page 1 of 64</p>	Part #	Name	Suggested Retail	08000888	Test 8888	5.99 hr*	180111	Mary Kay® Acne System Trial-Size Set	0.00 hr*	044465	Mary Kay® Lash Love™ Waterproof Mascara I • Black	15.00 hr*	049506	Mary Kay® Botanical Effects™ Cleanse Formula 1 (Dry Skin)	14.00 hr*	049504	Mary Kay® Botanical Effects™ Hydrate Formula 1 (Dry Skin)	16.00 hr*	<p>Click the Previously Ordered, Recommended, and Wish List tabs to view and quickly add products your customer has ordered in the past, products recommended for your customer based on her profile or products your customer has selected and added to her wish list.</p>
Part #	Name	Suggested Retail																	
08000888	Test 8888	5.99 hr*																	
180111	Mary Kay® Acne System Trial-Size Set	0.00 hr*																	
044465	Mary Kay® Lash Love™ Waterproof Mascara I • Black	15.00 hr*																	
049506	Mary Kay® Botanical Effects™ Cleanse Formula 1 (Dry Skin)	14.00 hr*																	
049504	Mary Kay® Botanical Effects™ Hydrate Formula 1 (Dry Skin)	16.00 hr*																	
 <p>Products</p> <p>All Previously Ordered Recommended Wish List</p> <p>Search: journey Q All</p> <table border="1"> <thead> <tr> <th>Part #</th> <th>Name</th> <th>Suggested Retail</th> </tr> </thead> <tbody> <tr> <td>280117</td> <td>Mary Kay® Journey® Eau de Parfum Wand</td> <td>0.00 hr*</td> </tr> <tr> <td>186700</td> <td>Journey® Eau de Parfum</td> <td>56.00 hr*</td> </tr> </tbody> </table> <p>2 Products - Page 1 of 1</p>	Part #	Name	Suggested Retail	280117	Mary Kay® Journey® Eau de Parfum Wand	0.00 hr*	186700	Journey® Eau de Parfum	56.00 hr*	<p>Searching for a product is a great tool to help you quickly find the product you need. Type the product name in the Search field. Click the Search icon or press the Enter key on the keyboard. A list of products with the name you entered is displayed.</p> <p>Click ADD to add the product to the order.</p>									
Part #	Name	Suggested Retail																	
280117	Mary Kay® Journey® Eau de Parfum Wand	0.00 hr*																	
186700	Journey® Eau de Parfum	56.00 hr*																	
 <p>Products</p> <p>All Previously Ordered Recommended Wish List</p> <p>Search: TimeWise Q</p> <p>Skin Care</p> <ul style="list-style-type: none"> All New Products Skincare Makeup Hair & Skin Fragrance Starter <table border="1"> <thead> <tr> <th>Part #</th> <th>Name</th> <th>Suggested Retail</th> </tr> </thead> <tbody> <tr> <td>029728</td> <td>TimeWise® Age-Fighting Eye Cream</td> <td>26.00 hr*</td> </tr> <tr> <td>029730</td> <td>TimeWise® Even Complexion Mask</td> <td>35.00 hr*</td> </tr> <tr> <td>026941</td> <td>TimeWise® 3-in-1 Cleanser (Combination / Oily)</td> <td>18.00 hr*</td> </tr> <tr> <td>029745</td> <td>TimeWise® Age-Fighting Lip Primer</td> <td>22.00 hr*</td> </tr> <tr> <td>001174</td> <td>TimeWise® Even Complexion Mask</td> <td>39.00 hr*</td> </tr> </tbody> </table> <p>25 Products - Page 1 of 5</p>	Part #	Name	Suggested Retail	029728	TimeWise® Age-Fighting Eye Cream	26.00 hr*	029730	TimeWise® Even Complexion Mask	35.00 hr*	026941	TimeWise® 3-in-1 Cleanser (Combination / Oily)	18.00 hr*	029745	TimeWise® Age-Fighting Lip Primer	22.00 hr*	001174	TimeWise® Even Complexion Mask	39.00 hr*	<p>You can refine your search by using the Category Filter. After typing the name of the product in the Search field, click the drop-down arrow beside the Category Filter and a list of categories displays. Choose the category. Products matching the product name you entered and the chosen category are displayed automatically.</p>
Part #	Name	Suggested Retail																	
029728	TimeWise® Age-Fighting Eye Cream	26.00 hr*																	
029730	TimeWise® Even Complexion Mask	35.00 hr*																	
026941	TimeWise® 3-in-1 Cleanser (Combination / Oily)	18.00 hr*																	
029745	TimeWise® Age-Fighting Lip Primer	22.00 hr*																	
001174	TimeWise® Even Complexion Mask	39.00 hr*																	

	<p>The Category Filter can be used alone to view a specific category of products. Click the down arrow to view the drop-down menu. Select a category. Products in the selected category are automatically displayed.</p> <p>If the product you need isn't on the first page click the Next button to scroll through each page of products or use Search along with the category to find the product you need.</p>
 <p>Once you have located the product, click Add to add the product to the order.</p> <p>When a product is added the Add Products (yellow bar) below will disappear.</p>	
 <p>The Add Products bar is replaced with the product you added.</p> <p>Update the quantity by clicking the up or down arrows beside the Quantity field.</p>	

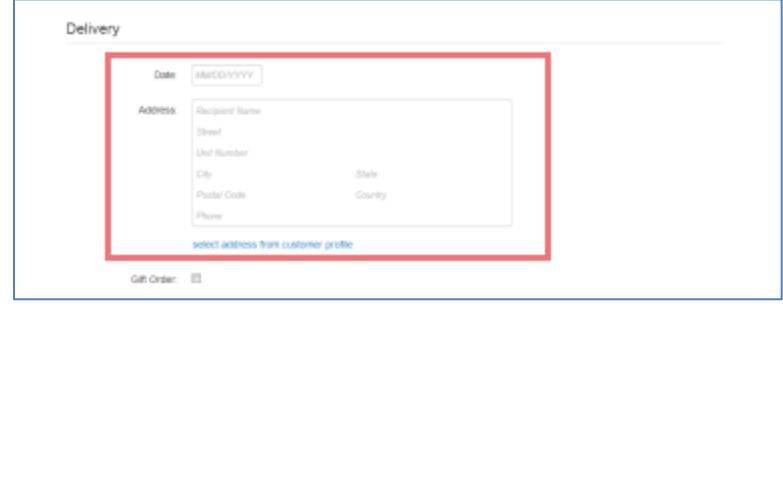
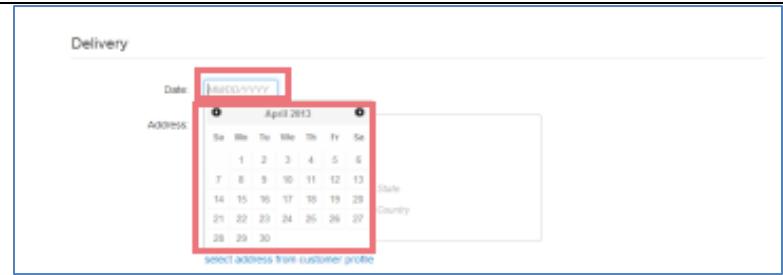
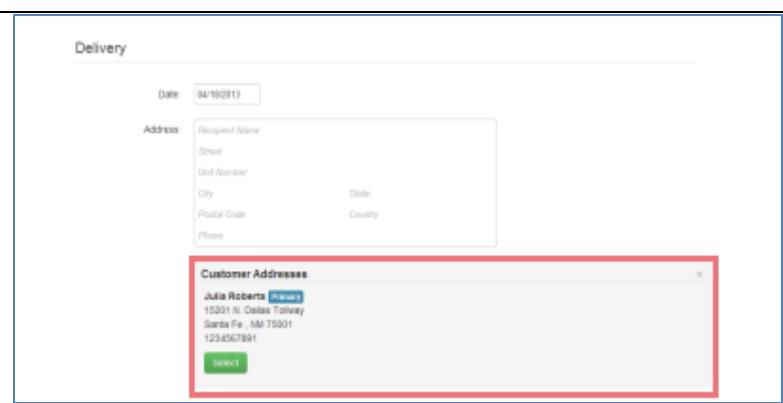
Adding a Reorder Reminder

 <p>The screenshot shows the 'Products' screen in the Mary Kay software. A search bar at the top has 'Journey' entered. Below it, a table lists two products: '200117 Mary Kay® Journey® Eau de Parfum Wand' and '166700 Journey® Eau de Parfum'. The 'Reorder Reminder' field for the second product is highlighted with a red box. A calendar modal is overlaid on this field, showing the month of April 2013. The date '05/21/2013' is selected and highlighted with a blue box.</p>	<p>Add a reorder reminder. Click inside the Reorder Reminder field. A calendar displays. Select the date for the reorder reminder to be generated.</p> <p>To choose a different month, use the arrows at the top of the calendar to move between months.</p>
 <p>The screenshot shows the same 'Products' screen as the first one, but the 'Reorder Reminder' field for the 'Journey® Eau de Parfum' product now contains the date '05/21/2013', which is highlighted with a red box. The rest of the interface remains the same, showing the search bar, product list, and quantity dropdown.</p>	<p>The Reorder Reminder field is automatically updated with the date you selected.</p>

Remove a Product

	<p>Remove a product by clicking Remove beside the product you want to remove.</p>
	<p>A confirmation screen displays. Click Ok to remove the product. Click Cancel if you do not want to remove the product.</p>

How to Deliver to Another Address

	<p>The Delivery field should be pre-populated with the address the customer has listed on her profile.</p> <p>If the order should be delivered to an address other than the customer's address, use the Delivery section to enter a different delivery address.</p> <p>Note: A different address can be setup in the Customer's Profile.</p>
	<p>Click in the Date field to enter a date. A calendar displays. Select the delivery date for the order.</p>
	<p>Enter the correct information for the recipient in the appropriate fields.</p> <p>Note: If the address is in the customer's profile, click the link "Select address from customer's profile."</p>
	<p>A Confirmation box displays to confirm this is the address you want to add.</p> <p>Click Select to add the address or click the "X" to close the box and not add the address.</p>

Delivery

Date: 04/18/2013

Address: Julia Roberts
15201 N. Dallas Tollway
Unit Number:
Santa Fe
75091
1234567891

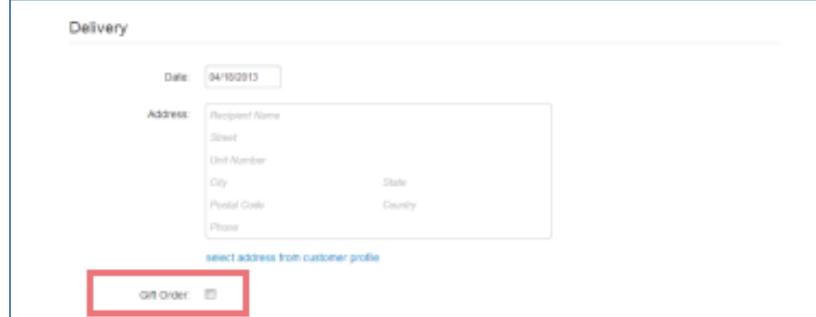
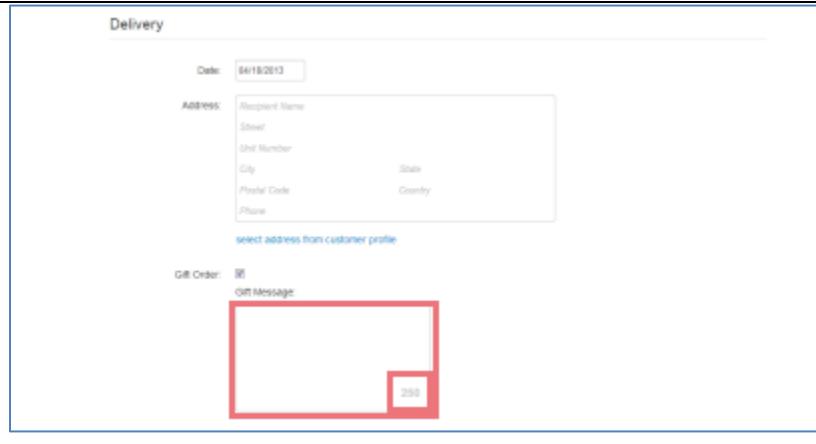
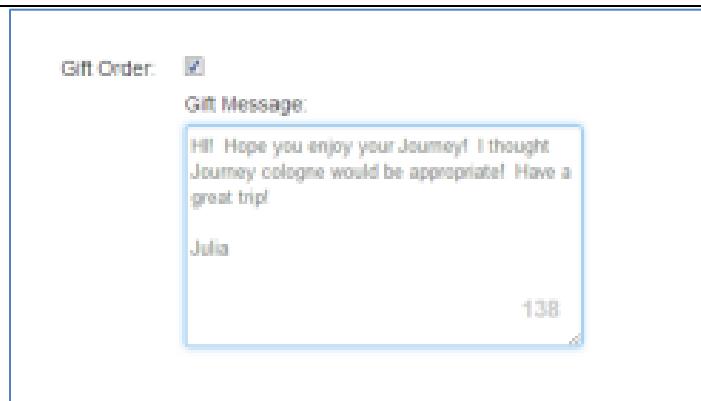
remove

select address from customer profile

The address is added after you have clicked **Select**.

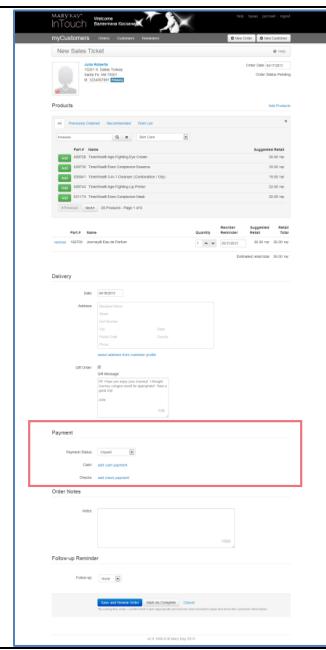
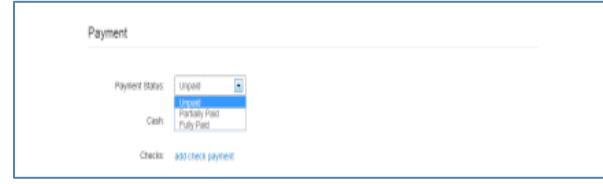
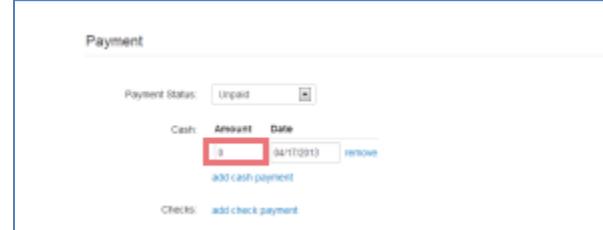
To remove the address, click **Remove**.

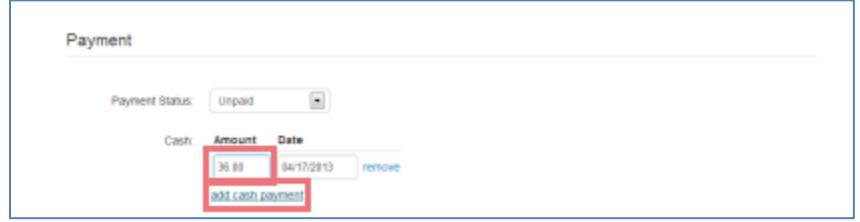
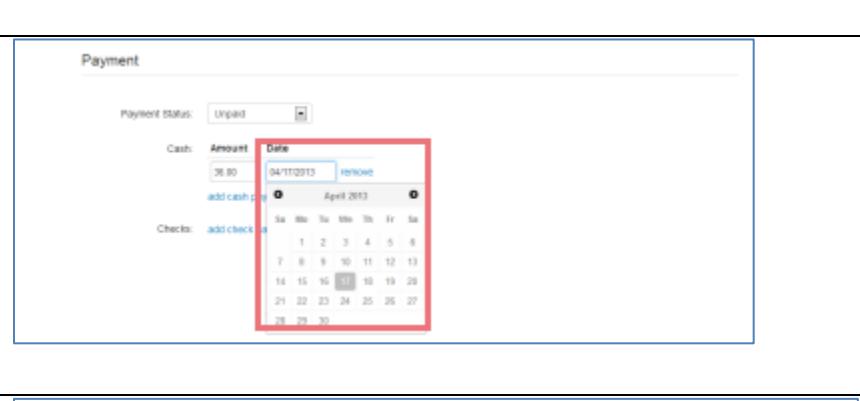
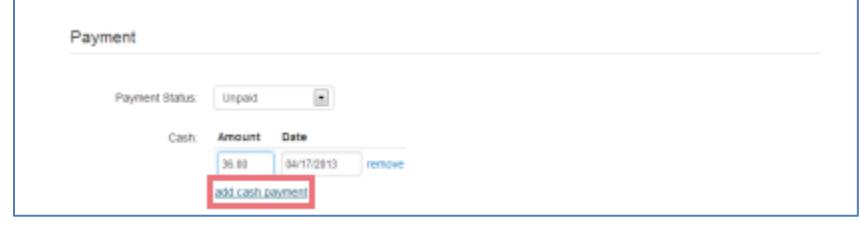
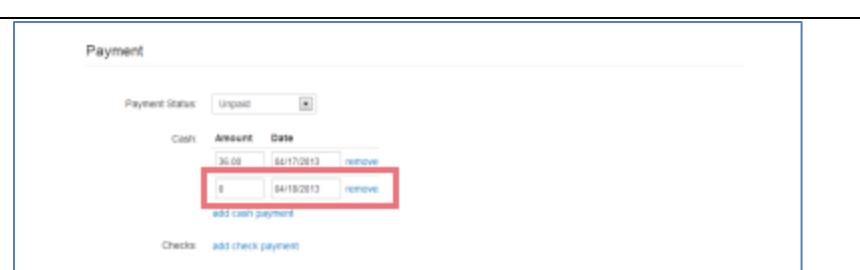
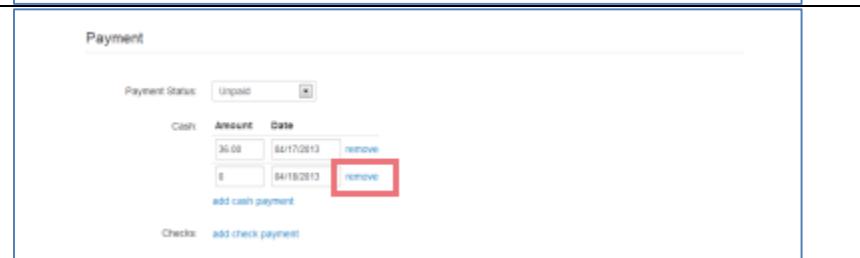
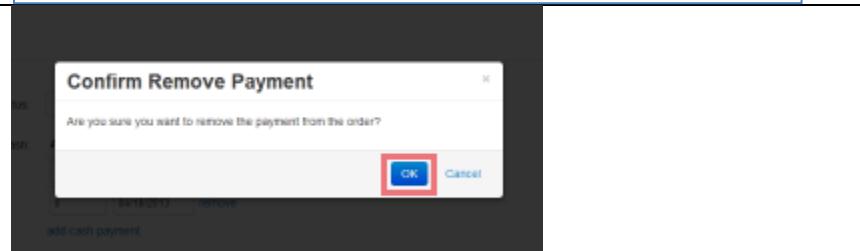
How to Add a Note for a Gift

	In the Delivery section below the Address field is Gift Order and a checkbox . If this order is a gift and the customer would like a note added to the order, click the checkbox .
	The Gift Message field is displayed. In the corner of the field is 250. This number represents the maximum number of characters that can be entered.
	Click inside the field and type your message. The number will decrease to let you know when you are close to the limit.

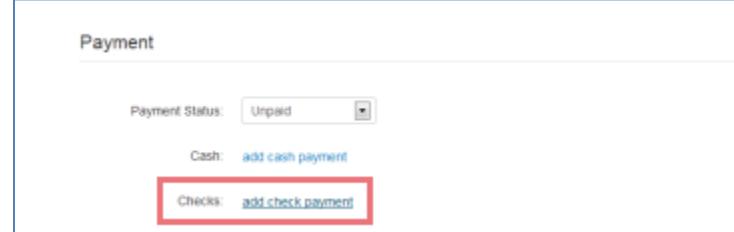
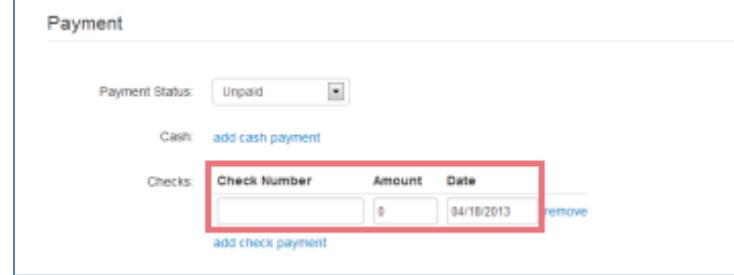
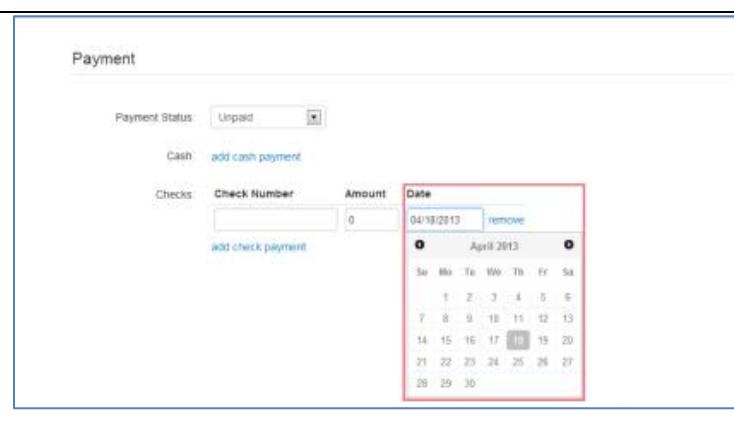
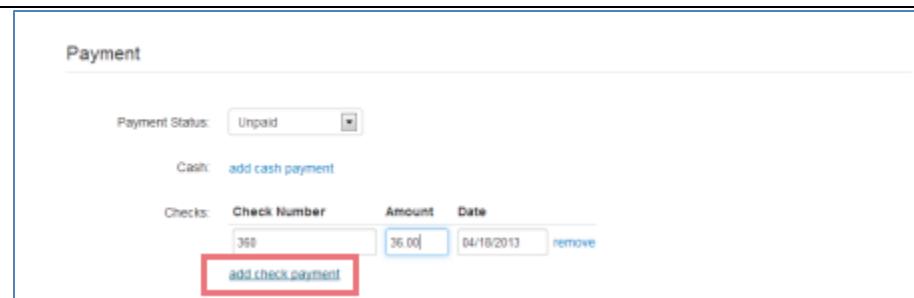
How to Add a Cash or Check Payment for an Order

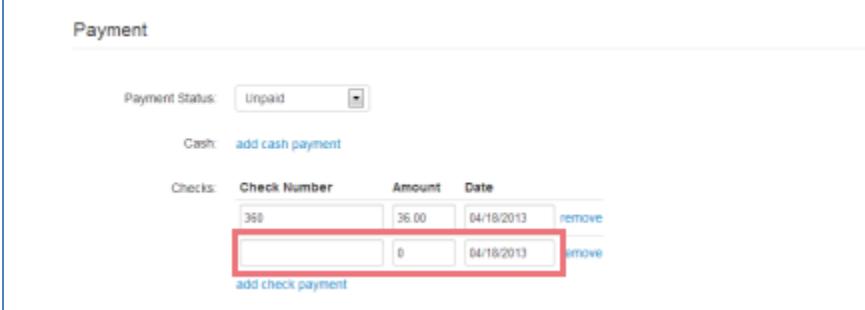
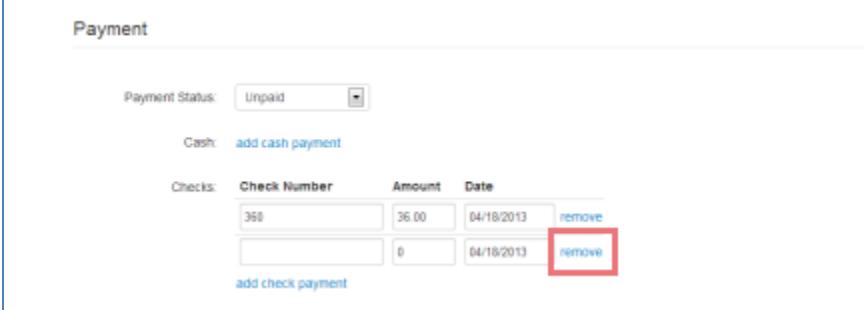
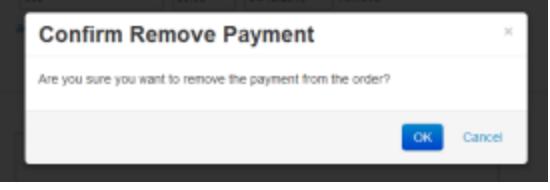
Cash Payment

	To enter a payment for an order, go to the Payment section of the New Sales Ticket page.
	There are 2 payment statuses, Partially Paid and Fully Paid . Choose the payment status from the Payment Status drop-down menu.
	There are 2 methods of payment, Check and Cash . A customer can pay using only cash, only a check or a combination of both. Select the appropriate payment type by clicking either the link “ Add cash payment ” or “ Add check payment .”
	Click “add cash payment.” The Amount and Date fields display.

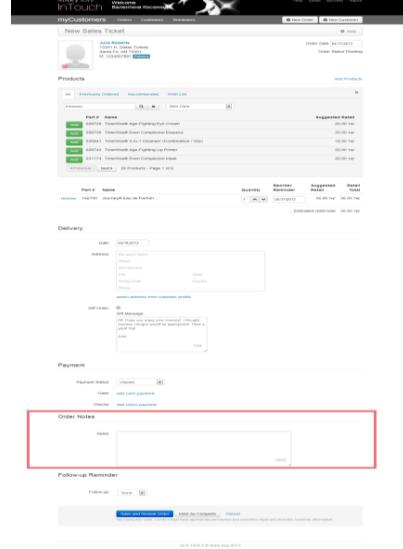
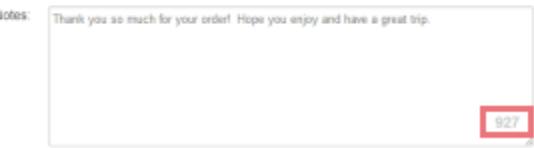
 <p>A screenshot of the Payment screen. It shows a table with one row for a cash payment. The first column is 'Cash:', the second is 'Amount' with the value '36.00', and the third is 'Date' with the value '04/17/2013'. A calendar dropdown is open over the date field, showing the month of April 2013. Below the table is a link 'add cash payment'.</p>	<p>For your convenience the current date is displayed in the Date field.</p>
 <p>A screenshot of the Payment screen. It shows a table with one row for a cash payment. The first column is 'Cash:', the second is 'Amount' with the value '36.00', and the third is 'Date' with the value '04/17/2013'. Below the table is a link 'add cash payment'.</p>	<p>To change the date, click inside the Date field. A calendar automatically displays. Choose the correct date. The date is immediately displayed in the Date field.</p>
 <p>A screenshot of the Payment screen. It shows two rows for cash payments. The first row has an amount of '36.00' and a date of '04/17/2013'. The second row has an amount of '0' and a date of '04/18/2013'. Below the table is a link 'add cash payment'.</p>	<p>When you have completed entering the payment click the link, "add cash payment."</p>
 <p>A screenshot of the Payment screen. It shows two rows for cash payments. The first row has an amount of '36.00' and a date of '04/17/2013'. The second row has an amount of '0' and a date of '04/18/2013'. The second row is highlighted with a red box around its entire row. Below the table is a link 'add cash payment'.</p>	<p>A second set of fields open to enter any additional payments.</p>
 <p>A screenshot of the Payment screen. It shows two rows for cash payments. The first row has an amount of '36.00' and a date of '04/17/2013'. The second row has an amount of '0' and a date of '04/18/2013'. The second row is highlighted with a red box around its entire row. Below the table is a link 'add cash payment'.</p>	<p>To remove a payment, click Remove.</p>
 <p>A screenshot of a confirmation dialog box titled 'Confirm Remove Payment'. It contains the question 'Are you sure you want to remove the payment from the order?'. At the bottom are two buttons: 'OK' (highlighted with a red box) and 'Cancel'.</p>	<p>A confirmation screen displays. Click OK to continue and remove the payment. Click Cancel if you choose not to remove the payment.</p>

Check Payment

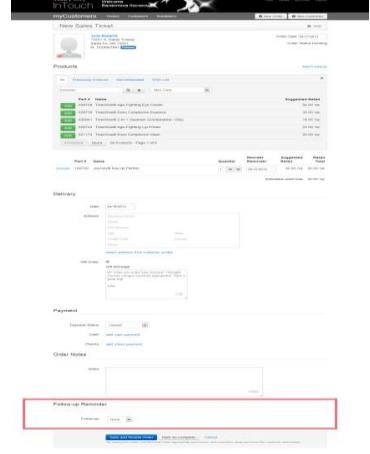
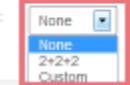
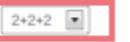
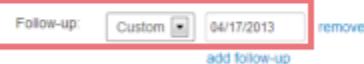
	To enter a payment by check, click the link, “add check payment.”
	The Check Number , Amount and Date fields are displayed. Enter the check number and amount in the appropriate fields.
	For your convenience the current date is displayed in the Date field. To change the date click inside the Date field. A calendar automatically displays. Choose the correct date. The date is immediately displayed in the Date field.
	After the payment information has been entered, click the link, “add check payment.”

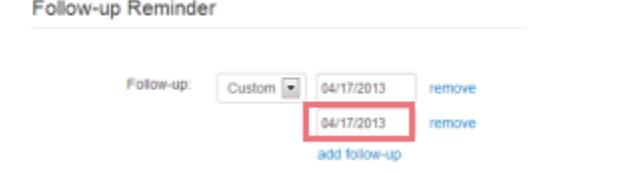
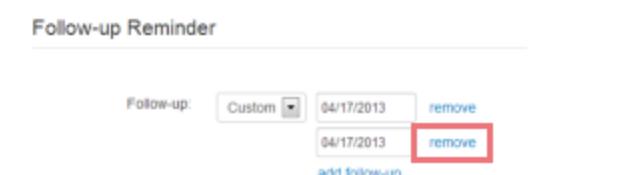
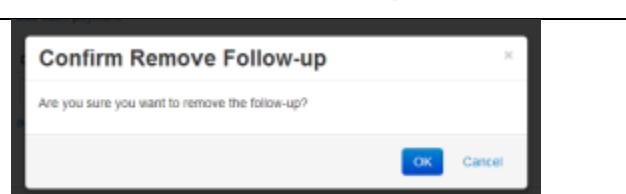
 <p>Payment</p> <p>Payment Status: Unpaid</p> <p>Cash: add cash payment</p> <p>Checks:</p> <table border="1"> <thead> <tr> <th>Check Number</th> <th>Amount</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>360</td> <td>36.00</td> <td>04/18/2013</td> <td>remove</td> </tr> <tr> <td></td> <td>0</td> <td>04/18/2013</td> <td>remove</td> </tr> </tbody> </table> <p>add check payment</p>	Check Number	Amount	Date	360	36.00	04/18/2013	remove		0	04/18/2013	remove	<p>A second set of fields open to enter any additional payments.</p>
Check Number	Amount	Date										
360	36.00	04/18/2013	remove									
	0	04/18/2013	remove									
 <p>Payment</p> <p>Payment Status: Unpaid</p> <p>Cash: add cash payment</p> <p>Checks:</p> <table border="1"> <thead> <tr> <th>Check Number</th> <th>Amount</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>360</td> <td>36.00</td> <td>04/18/2013</td> <td>remove</td> </tr> <tr> <td></td> <td>0</td> <td>04/18/2013</td> <td>remove</td> </tr> </tbody> </table> <p>add check payment</p>	Check Number	Amount	Date	360	36.00	04/18/2013	remove		0	04/18/2013	remove	<p>To remove a payment, click Remove.</p>
Check Number	Amount	Date										
360	36.00	04/18/2013	remove									
	0	04/18/2013	remove									
 <p>Confirm Remove Payment</p> <p>Are you sure you want to remove the payment from the order?</p> <p>OK Cancel</p>	<p>A confirmation screen displays. Click OK to continue and remove the payment. Click Cancel if you choose not to remove the payment.</p>											

How to Add Notes to an Order

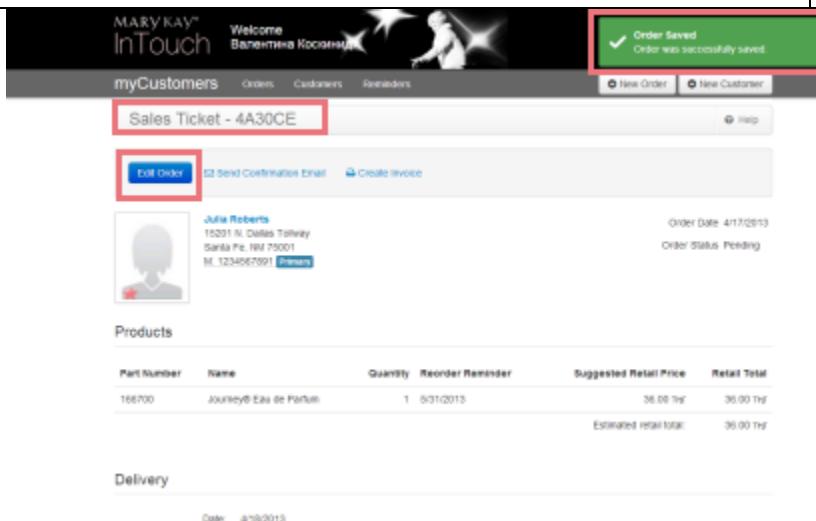
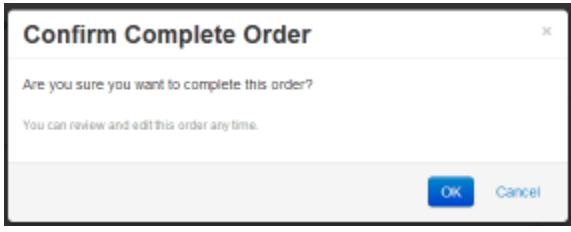
	<p>In the Notes section, you can add a note to your customer that will be included on the invoice.</p>
<p>Order Notes</p> <p>Notes:</p> 	<p>To add notes, click inside the Notes field and enter the note.</p> <p>In the corner of the field is 1000. This number represents the maximum number of characters allowed.</p>
<p>Order Notes</p> <p>Notes:</p> 	<p>Click inside the field and type your message. The number will decrease to let you know when you are close to the maximum limit.</p>

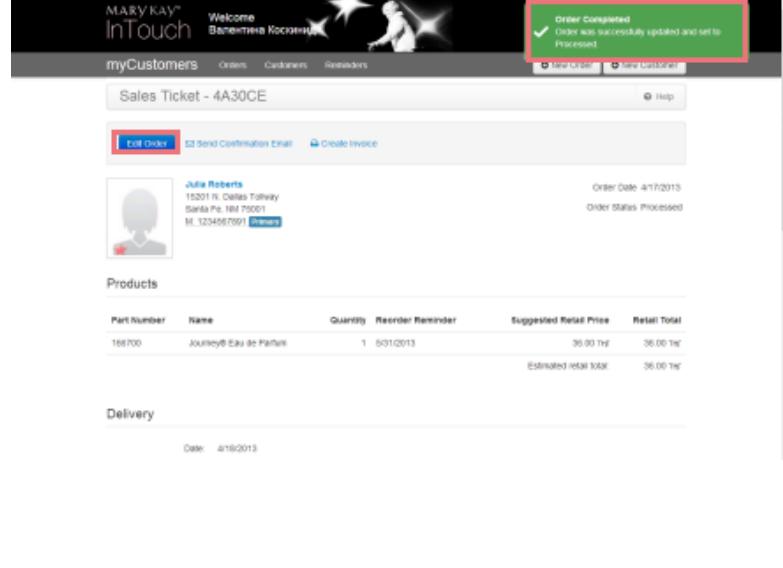
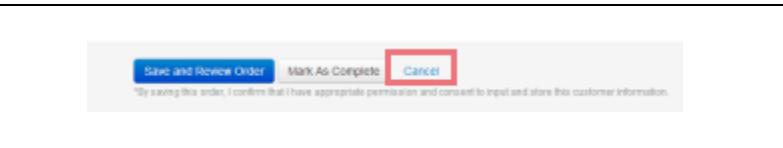
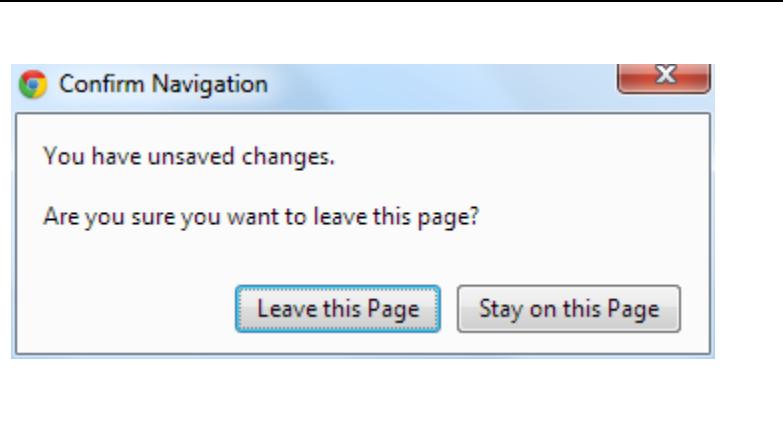
How to Add a Follow-Up Reminder

	<p>Setup a Follow-Up Reminder to help you to remember when to follow up with your customer concerning her product purchase.</p>
<p>Follow-up Reminder</p> <p>Follow-up:</p> 	<p>Follow-up reminder options are None, 2+2+2 and Custom.</p> <p>Click the down arrow to select the follow-up option.</p>
<p>Follow-up Reminder</p> <p>Follow-up:</p> 	<p>To use a preset reminder, choose the 2+2+2 option. When you choose the follow-up reminder for 2+2+2 you will automatically receive 3 reminders to follow-up with your customer. The first reminder is 2 days after the date of the order, the second is 2 weeks following the order date and the third reminder is 2 months following the order date.</p>
<p>Follow-up Reminder</p> <p>Follow-up:</p> 	<p>To setup a custom follow-up reminder, select the Custom option. A date field opens with the current date.</p>
<p>Follow-up Reminder</p> <p>Follow-up:</p> 	<p>Choose to use the current date or change the date by clicking inside the Date field. A calendar displays. Select a date from the calendar.</p>

	<p>To add another follow-up reminder, click the link, "add follow-up."</p>
	<p>Another Date field is displayed to set another reminder. Change the date as described above. Additional reminders can be added using the same method described above..</p>
	<p>To remove a follow-up reminder, click Remove.</p>
	<p>A confirmation screen displays. To remove the reminder, click Ok. If you choose not to remove the reminder, click Cancel.</p>

How to Save, Complete or Cancel an Order

	To save the order and complete it later, click the Save and Review Order button. The order is saved and the Review Order page displays.
	A confirmation displays on the Review Order page confirming the order was saved successfully.
	An Order Number is assigned to the order.
	To reopen the order and continue working, click Edit Order .
	Once the order is complete, click Mark As Complete .
	A confirmation screen displays to confirm you want to complete the order. Click Ok to continue and complete the order. Click Cancel if you don't want to complete the order. Note: You can review and edit the order any time.

	<p>A confirmation displays on the Review Order page confirming the order was successfully completed.</p> <p>An Order Number is assigned to the order.</p> <p>The status has been changed from Pending to Processed.</p> <p>To reopen the order and make changes, click the Edit Order button.</p>
	<p>To cancel the order, click Cancel.</p>
	<p>A confirmation screen displays confirming that the changes have not been saved and you do want to leave the page. To continue and cancel the order click Leave this Page. To stay on the page and not cancel the order, click Stay on this Page.</p>

How to Review An Order

The screenshot shows the Mary Kay InTouch software interface. At the top, it says "Welcome Barbara Kocman". Below that is a navigation bar with links for "myCustomers", "Orders", "Customers", "Resources", "New Order", and "New Customer". A sub-menu for "Sales Ticket" is open, showing "A7B671". The main content area displays a customer profile for "Julie Roberts" with address information: 1520 N. Dallas Today, Santa Fe, NM 87501. The order date is 4/19/2013 and the status is Pending. The "Products" section lists two items: "Mary Kay® Acne System Trial Size Set" (Quantity 1) and "Mary Kay® Lash Love™ Waterproof Mascara" (Quantity 2). The total estimated retail price is \$8.00. The "Delivery" section shows the address again. The "Payment" section indicates the payment status is "Unpaid" and shows a payment record for "Cash" amount \$8.00 on 4/19/2013.

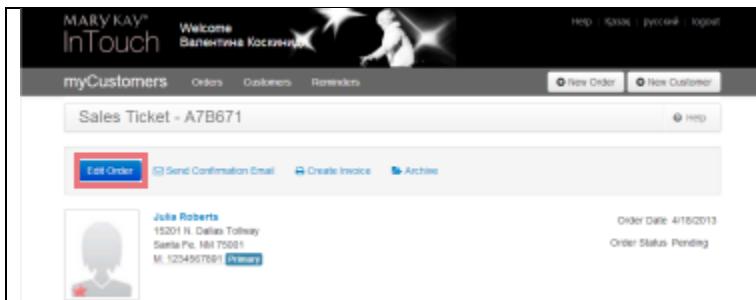
Clicking Save and Review or Mark as Complete opens the Review Order page.

The **Review Order** page gives you an opportunity to review the order to be sure it is correct and ready.

If the **Save and Review** button was used, the status on the **Review Order** page is **Pending**.

If the **Mark as Complete** button was used, the status on the **Review Order** page is **Processed**.

How to Make Changes to an Order



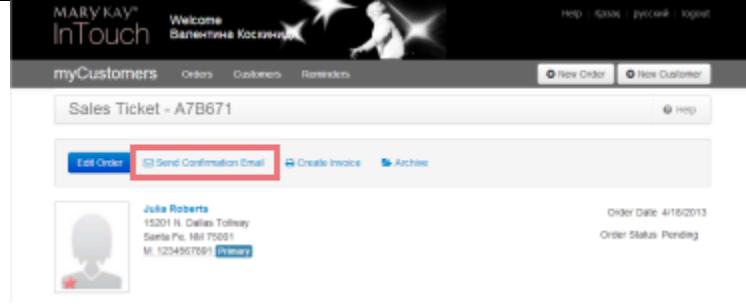
Click **Edit Order** to make changes to the order.

A screenshot of the "Edit Sales Ticket" page for Sales Ticket A7B671. The page is titled "Edit Sales Ticket - A7B671". It shows a list of products with their descriptions, quantities, and prices. Under "Delivery", there are fields for "Date", "Address", "City", "State", "Zip", and "Comments". Under "Payment", there are dropdown menus for "Payment Status" (set to "Unpaid"), "Card", "Amount", and "Date". There are also buttons for "Check" and "Check Payment". Under "Order Notes", there is a text input field. At the bottom, there are buttons for "Save and Review" and "Mark as Complete".

The **Edit Sales Ticket** page opens.

Once you are finished making changes, click the **Save and Review** or **Mark as Complete** button to save your changes and go to the **Review Order** screen.

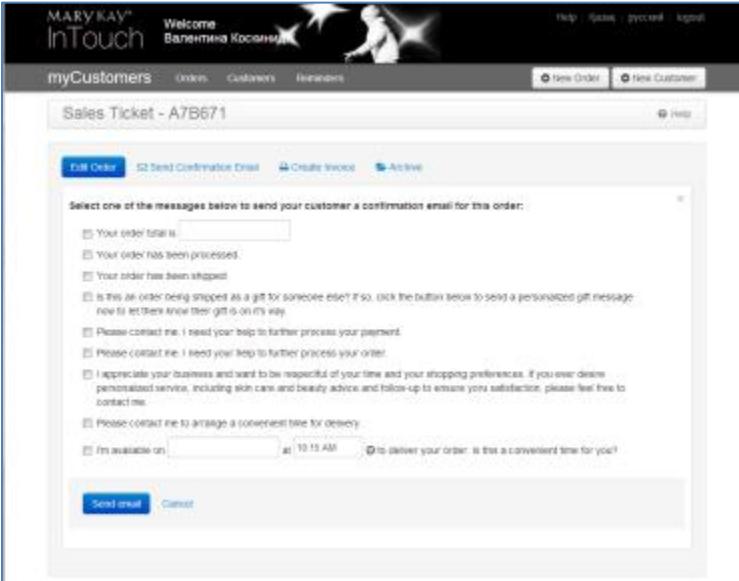
How to Send a Confirmation Email



The screenshot shows the Mary Kay InTouch software interface. At the top, there's a navigation bar with links for Help, Status, myCustomer, and Logout. Below that is a sub-navigation bar with links for myCustomers, Orders, Customers, and Rewards. A banner at the top features the Mary Kay logo and the text "Welcome Валентина Косынка". The main area displays a sales ticket for Sales Ticket - A7B671. On the left, there's a customer profile for "Julee Roberts" with an address: 15201 N. Dallas Tollway, Suite Pk. #6175081, M. 1234567891. To the right, it shows Order Date: 4/16/2013 and Order Status: Pending. Below the profile, there are buttons for Edit Order, Send Confirmation Email (which is highlighted with a red box), Create Invoice, and Archive.

It's easy to let the customer know the status of her order or that you need additional information.

Click **Send Confirmation Email** to send an email to the customer.



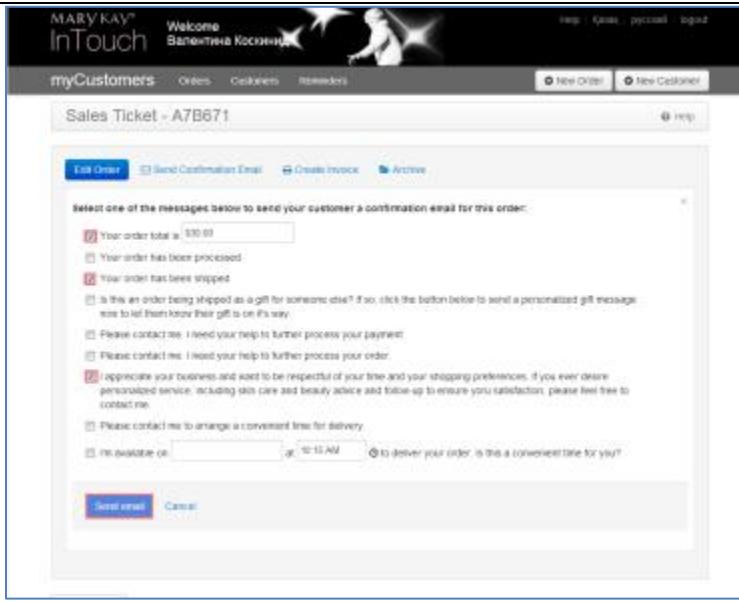
This screenshot shows the "Send Confirmation Email" dialog box. It starts with the message "Select one of the messages below to send your customer a confirmation email for this order:". Below this, there's a list of checkboxes for different messages:

- Your order total is: \$30.00
- Your order has been processed.
- Your order has been shipped.
- Is this an order being shipped as a gift for someone else? If so, click the button below to send a personalized gift message now to let them know their gift is on its way.
- Please contact me. I need your help to further process your payment.
- Please contact me. I need your help to further process your order.
- I appreciate your business and want to be respectful of your time and your shopping preferences. If you ever desire personalized service, including skin care and beauty advice and follow-up to ensure your satisfaction, please feel free to contact me.
- Please contact me to arrange a convenient time for delivery.
- I'm available on: to deliver your order. Is that a convenient time for you?

At the bottom of the dialog box are two buttons: "Send Email" and "Cancel".

The **Confirmation Email** screen displays.

Click the **checkbox** to select one or more of the messages to be included in the confirmation email.



This screenshot shows the same "Send Confirmation Email" dialog box as the previous one, but with several checkboxes selected. Specifically, the first four checkboxes (about order status) and the last checkbox (about delivery time) are checked. The other checkboxes are unselected.

Click **Send Email** to send the confirmation email to the customer.

The screenshot shows the Mary Kay InTouch software interface. At the top, there's a banner with the company logo and a welcome message for 'Valentina Kosyina'. Below the banner, the main menu includes 'myCustomers', 'Orders', 'Database', 'Resources', 'New Order', and 'View Customer'. A green success message box at the top right says 'Confirmation email successfully sent!'. The main content area is titled 'Sales Ticket - A7B671' and contains a sub-menu with 'Edit Order', 'Send Confirmation Email', 'Create Invoice', and 'Actions'. A large pop-up window titled 'Select one of the messages below to send your customer a confirmation email for this order:' is displayed. It lists several options, with the first one, 'Your order total is: 30.00', checked. Other options include: 'Your order has been processed.', 'Your order has been shipped.', 'Is this an order being shipped as a gift for someone else? If so, click the button below to send a personalized gift message now to let them know their gift is on its way.', 'Please contact me. I need your help to further process your payment.', 'Please contact me. I need your help to further process your order.', 'I appreciate your business and want to be respectful of your time and your shopping preferences. If you ever desire personalized service, including skin care and beauty advice and follow-up to ensure your satisfaction, please feel free to contact me.', 'Please contact me to arrange a convenient time for delivery.', and 'My available on _____ at _____ AM/PM To deliver your order, is this a convenient time for you?'. At the bottom of the pop-up are two buttons: 'Send Email' and 'Cancel'. Below the pop-up, the customer information 'Julia Roberts' and 'Order Date: 4/18/2013' are visible.

A confirmation displays confirming the email was sent successfully.

This screenshot is identical to the one above, showing the 'Confirmation Email' screen. However, the 'Cancel' button at the bottom of the pop-up window is now highlighted with a red box, indicating it has been selected or is the focus of the instruction.

To cancel the confirmation email before it has been sent, click **Cancel**.

Note: Once the email has been sent there is no way to cancel it.

Close the **Confirmation Email** screen by click the "X"

How to Create an Invoice

	<p>To create an invoice for the order, click Create Invoice.</p>
	<p>The Create Invoice screen displays. You have the option to create the invoice in a PDF or Excel format.</p> <p>Note: If the invoice is created in a PDF format it <i>will not</i> be editable.</p> <p>Choose the radio button beside the format you wish to use.</p>
	<p>A message from you to the customer or a gift message from the customer to the recipient can be included on the invoice.</p> <p>To include a message to the customer or a gift message, click the appropriate link.</p>

Sales Ticket - A7B671

Invoice Message:

Gift Message: add gift message

Create Invoice Cancel

*Note: Clicking this button will only be available once you have entered your message.

The **Message** box is displayed. Up to 250 characters can be entered.

Sales Ticket - A7B671

Invoice Message:

Gift Message: add gift message

Create Invoice Cancel

*Note: Clicking this button will only be available once you have entered your message.

As the message is entered, the number in the right corner counts down the remaining number of characters available for the message.

When you are ready, click **Create Invoice**.

Ship To	Bill To
Business Nameless #12321 N. Dallas Parkway Suite Pk #807/808	Addressee 12321 N. Dallas Parkway Suite Pk #807/808

Order #: A7B671 Date: 10/24/2013

Qty	Product Name	Price*	Amount
1	Mary Kay® Acne System Trial Size Set	\$1.00 incl. tax	\$1.00 incl. tax
1	Mary Kay® Lash Love™ Waterproof Mascara w/ Brush	\$2.00 incl. tax	\$2.00 incl. tax

All prices are suggested retail.

Estimated Suggested Retail Value: \$1.00 incl. tax
Adjustments:
Sales Tax: \$0.00 incl. tax
TOTAL: \$3.00 incl. tax

*For purchases totaling \$25 or more, you, the buyer, may cancel this transaction at any time prior to midnight of the third business day after the date of this transaction. See the attached Notice of Cancellation Form for an explanation of this right.

The invoice is created and available to open and print.

This is the PDF version of the invoice with a note from the Independent Beauty Consultant to the customer.

Click to add header										
Sold By Barbara Koschmiga P.O. Box 110-11 Tucson, MA 85734	Sold To Julie Roberts 11221 N. Dallas Turnpike Santa Fe, NM 87501									
Order # a7B671	Date 12/14/2013									
Gty Product Name	Price	Amount								
1 Mary Kay® Acne System Trial Size Set Combination/Oily	0.00 / kg	0.00 / kg								
2 Mary Kay® Lash Love™ Waterproof Mascara • Black	35.00 / kg	35.00 / kg								
All prices are suggested retail.										
<table border="1"> <tr><td>Estimated Suggested Retail Values</td><td>30.00 / kg</td></tr> <tr><td>Adjustments</td><td></td></tr> <tr><td>Sales Tax</td><td></td></tr> <tr><td>TOTAL:</td><td>30.00 / kg</td></tr> </table>			Estimated Suggested Retail Values	30.00 / kg	Adjustments		Sales Tax		TOTAL:	30.00 / kg
Estimated Suggested Retail Values	30.00 / kg									
Adjustments										
Sales Tax										
TOTAL:	30.00 / kg									
<p>Hope you enjoy your products on your trip!</p> <p>For purchases totaling \$20 or more, you, the buyer, may cancel this transaction at any time prior to midnight of the third business day after the date of this transaction. See the attached Notice of Cancellation Form for an explanation of this right.</p>										

MARY KAY® InTouch		Welcome Барбара Косчмига	Help Logout printout logout
myCustomers	Orders Customers Reminders		New Order New Customer Help
Sales Ticket - A7B671			
Edit Order Send Confirmation Email Create Invoice Archive			
Format: <input checked="" type="radio"/> PDF <input type="radio"/> EXH			
Message: Thank you for your order. I can't wait to see how you like your product.			
Remove			
Gift Message: add gift message			
Create Invoice Cancel			

This is the Excel version of the invoice with a gift message included.

To remove a message, click **Remove** and the field closes and the message is removed.

Reminders

The screenshot shows the Mary Kay InTouch software interface. At the top, there's a navigation bar with links for 'myCustomers', 'Orders', 'Customers', and 'Rewards'. Below the navigation is a banner with two women looking at a smartphone. The main content area has three sections: 'Customers' (with a link to 'Manage Your Customers'), 'Orders' (with a link to 'Manage Your Orders'), and 'Reminders' (with a link to 'Manage Your Reminders'). The 'Reminders' section is highlighted with a red box.

Reminders help you to stay organized and on top of your Mary Kay business with reminders you create and reminders automatically generated by myCustomers. The types of reminders you see range from customers who have registered or updated their information on your website, product follow-ups, sample deliveries, and the list goes on and on.

You can,

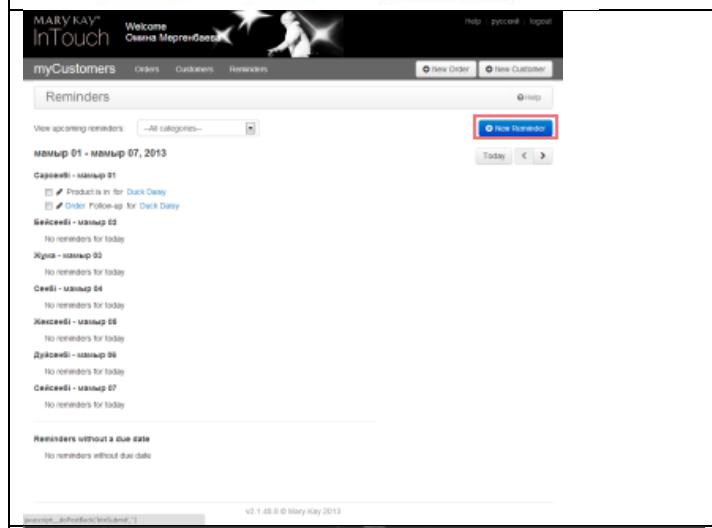
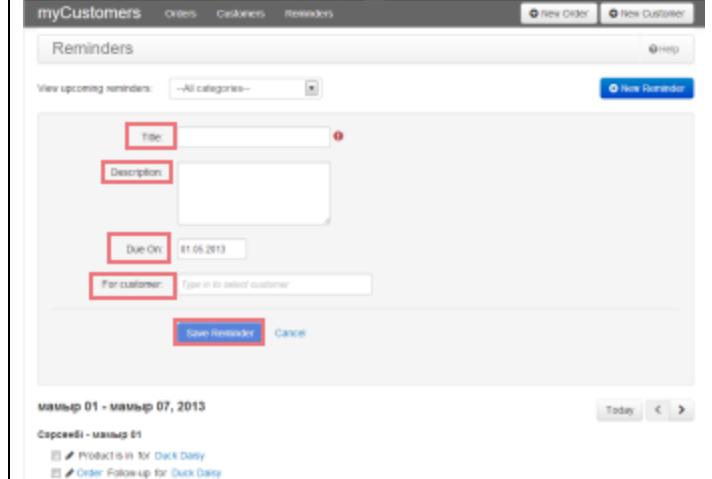
- [Add a reminder](#)
- [Edit a reminder](#)
- [Close or complete a reminder](#)
- [Sort reminders with the filter](#)
- [Viewing reminders](#)

This screenshot is similar to the one above, showing the myCustomers home page. The 'Reminders' section is again highlighted with a red box. The 'Manage Your Reminders' button is also specifically highlighted with a red box.

To open Reminders from the Home page, click **Reminders** or the **Manage Reminders** button.

Reminders is also on the **Navigation Bar** so you can open the **Reminders** section regardless of where you are in myCustomers.

How to Add a Reminder

	<p>Open Reminders from the Navigation Bar or from the Home page.</p>
	<p>The current week of reminders is shown on by default.</p> <p>To add a new reminder, click the New Reminder button.</p>
	<p>The following fields display,</p> <ul style="list-style-type: none"> Title (required) – what is the topic or main point of the reminder Description – additional information Due on – the date the reminder should display so you will see it For customer – To who or what does the reminder refer?

The screenshot shows the 'Reminders' section of the myCustomers software. A new reminder is being created with the following details:

- Title:** Minnie's order is ready
- Description:** (empty)
- Due On:** 01.06.2013
- For customer:** A dropdown menu lists 'Minnie Mouse' twice; the second entry is highlighted with a blue selection bar.
- Buttons:** Save Reminder (highlighted with a red box) and Cancel.

Enter information in the various fields.

Note: The **Title** field is a required field so something has to be entered in the **Title** field to complete the reminder.

As you enter the customer's name in the **Customer** field the system will automatically create a list of customers with that name. Instead of continuing to enter the name, just select your customer from the list!

Once all of the information has been entered, click the **Save Reminder** button.

myCustomers	Orders	Customers	Reminders
Reminders			
View upcoming reminders: --All categories--			
Мамыр 01 - мамыр 07, 2013			
Серсенбі - мамыр 01			
<input type="checkbox"/> Product is in for Duck Daisy <input type="checkbox"/> Order Follow-up for Duck Daisy <input checked="" type="checkbox"/> Minnie's order is ready for Minnie Mouse			
Берілген - мамыр 02			
No reminders for today			

The reminder is saved and because our reminder was created for today, it is displaying under today's reminders.

How to Edit a Reminder

	<p>Once a reminder has been created you may need to make changes to it.</p> <p>To edit a reminder, click the Pencil icon located beside the reminder.</p>
	<p>Editable fields are displayed below the reminder you are editing.</p>
	<p>Once your changes are complete, click the Save Changes button to complete the change.</p> <p>If you do not want to save the changes, click Cancel.</p>

The screenshot shows the myCustomers software interface with the 'Reminders' tab selected. The main area displays a list of reminders categorized by date:

- May 01 - May 07, 2013**
 - Сервисы - маябр 01
 - Product B is for [Duck Dally](#)
 - Order: Followup for [Duck Dally](#)
 - Делови - маябр 02
 - No reminders for today
 - Игра - маябр 03
 - No reminders for today
 - Сервиси - маябр 04
 - Order is ready for [Inhouse Minnie](#)
 - Компани - маябр 05
 - No reminders for today
 - Документи - маябр 06
 - No reminders for today
 - Делови - маябр 07
 - No reminders for today

Reminders without a due date

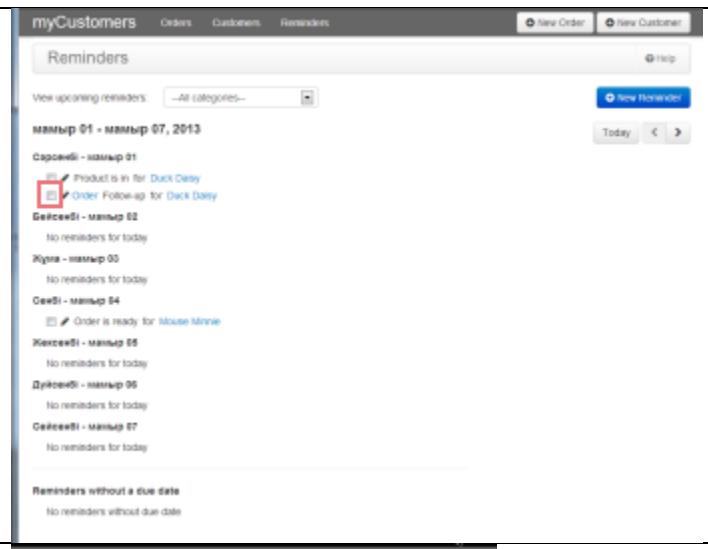
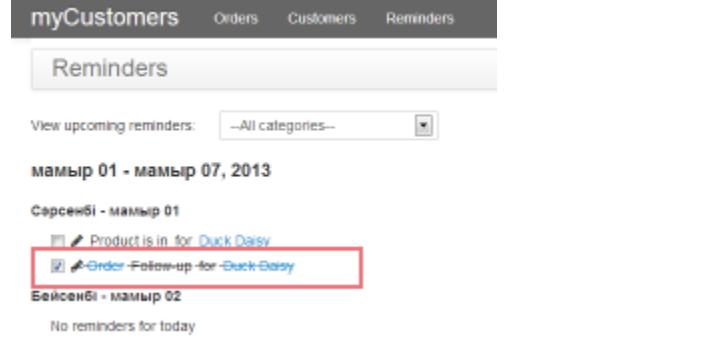
- No reminders without due date

A specific reminder entry for "Order is ready for Inhouse Minnie" is highlighted with a red rectangular box.

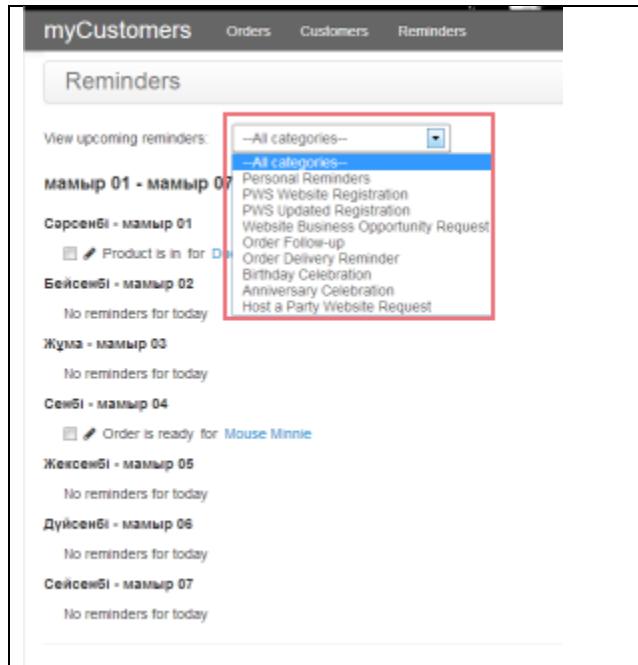
The right side of the interface contains a large empty white area with the following text:

The reminder is updated and was moved under the updated date.

How to Close or Complete a Reminder

 <p>The screenshot shows the 'Reminders' section of the myCustomers software. It lists several reminders for today, each with a checkbox. The second reminder, 'Order Follow-up for Duck Daisy', has its checkbox checked and is highlighted with a red box.</p>	<p>To close or complete a reminder, click the checkbox beside the reminder.</p>
 <p>The screenshot shows the same 'Reminders' section after the reminder 'Order Follow-up for Duck Daisy' has been completed. The checkbox is checked and the entire line for that reminder is crossed out with a thick red line.</p>	<p>A line is drawn through the reminder to indicate it will be removed once the page is refreshed by leaving and returning to the page or by clicking the browser's  Refresh icon</p>

How to Sort Reminders



The screenshot shows the 'Reminders' section of the myCustomers application. At the top, there are tabs for 'Orders', 'Customers', and 'Reminders'. Below the tabs, a heading says 'Reminders' and 'View upcoming reminders:'. A dropdown menu is open, showing 'All categories' selected. A red box highlights this selection. The menu also lists other categories: Personal Reminders, PWS Website Registration, PWS Updated Registration, Website Business Opportunity Request, Order Follow-up, Order Delivery Reminder, Birthday Celebration, Anniversary Celebration, and Host a Party Website Request. The main content area displays customer reminder counts for the week:

- Мамыр 01 - мамыр 07: 0 reminders for today, with a note 'Product is in for' and a link 'Mouse Minnie'.
- Сарсенбі - мамыр 01: 0 reminders for today.
- Бейсембі - мамыр 02: 0 reminders for today.
- Жұма - мамыр 03: 0 reminders for today.
- Сәнбі - мамыр 04: 0 reminders for today.
- Жекесенбі - мамыр 05: 0 reminders for today.
- Дүйсенбі - мамыр 06: 0 reminders for today.
- Сейсембі - мамыр 07: 0 reminders for today.

Reminders are displayed in a weekly view meaning that all reminders for a week are displayed on a page.

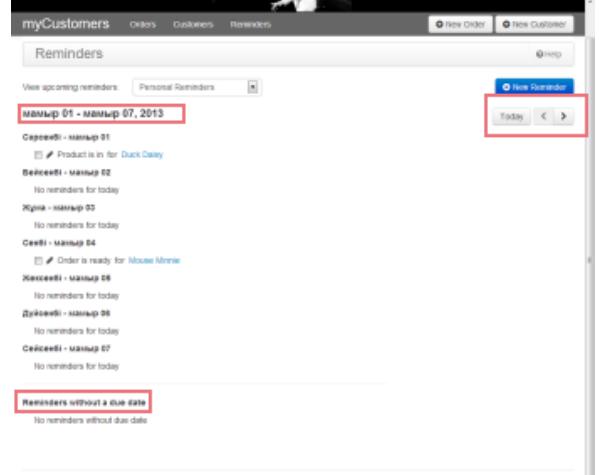
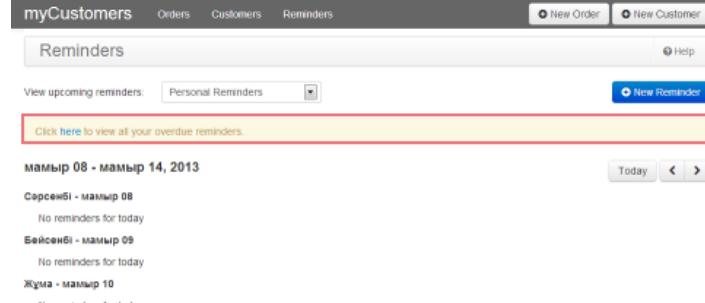
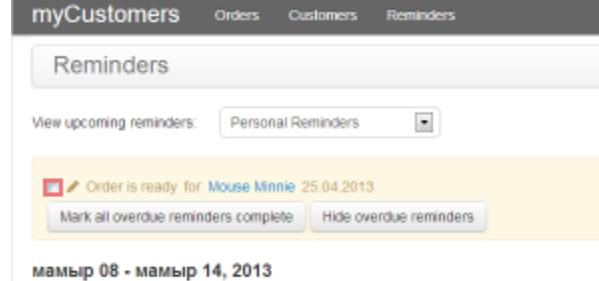
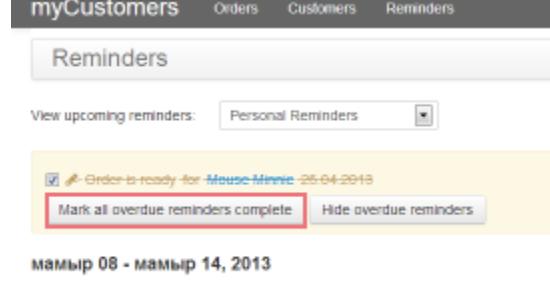
Another way to view reminders is to use the **View Upcoming Reminders** filter to sort reminders using pre-defined categories.

Click the arrow to view the drop-down menu.

Select the category.

All reminders that correspond to the selected category are displayed.

How to View Reminders

	<p>Reminders by default, are displayed a week at a time.</p> <p>Use the scroll buttons to move between weeks.</p> <p>Reminders created without a due date are located in the Reminders Without a Due Date section located below the weekly reminders.</p>
	<p>A reminder for any overdue reminders that have not been marked as closed is displayed as a yellow bar.</p> <p>To view the overdue reminders, click the Here link.</p>
	<p>All overdue reminders are displayed.</p>
	<p>A line is drawn through the reminder to indicate it will be removed.</p> <p>Click the Mark all overdue reminders complete button to remove the reminder.</p> <p>To close the Overdue Reminder bar, without removing a reminder, click Hide Overdue reminders.</p>