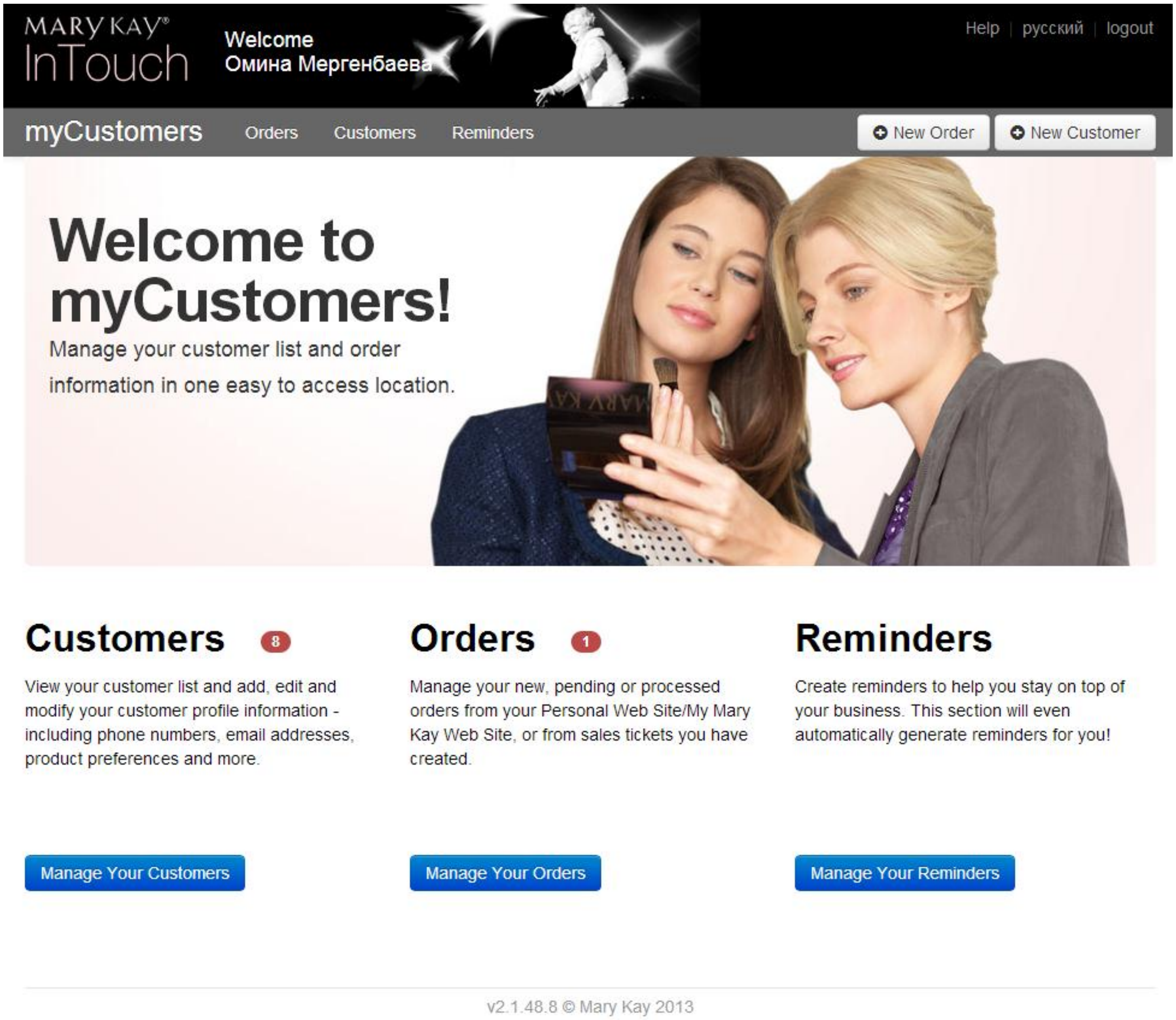
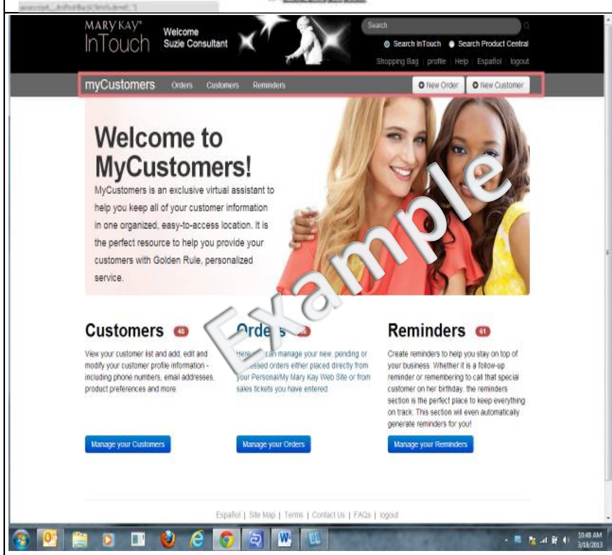


myCustomers Reference Guide

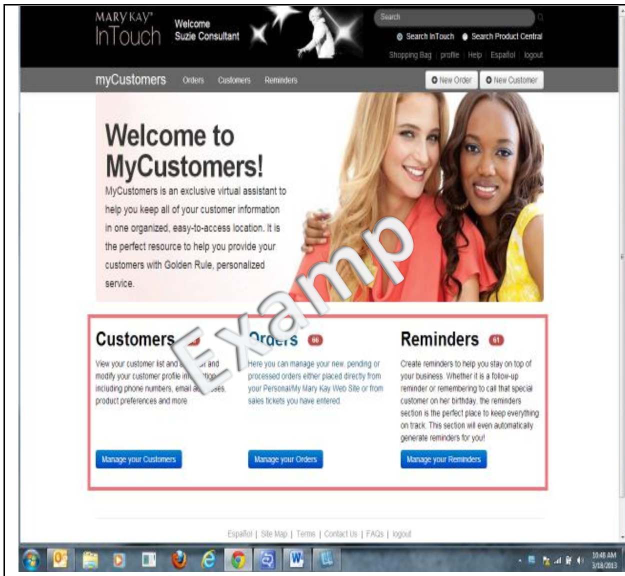
Section Links

myCustomers Dashboard

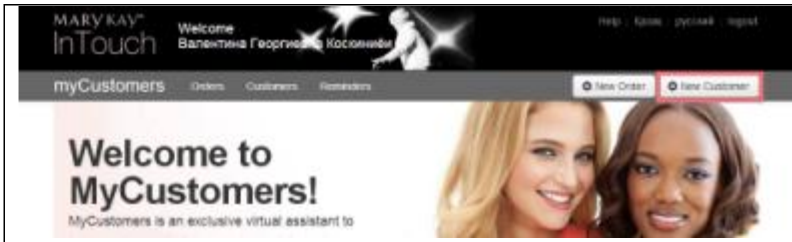
<table>
<tr>
<td>
</td>
<td>The first time you log in to myCustomers a Terms of Use Agreement displays. After reading through the agreement, if you agree with the terms and want to use myCustomers, click Accept. If you do not agree to the terms and do not want to use myCustomers, click Cancel.</td>
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

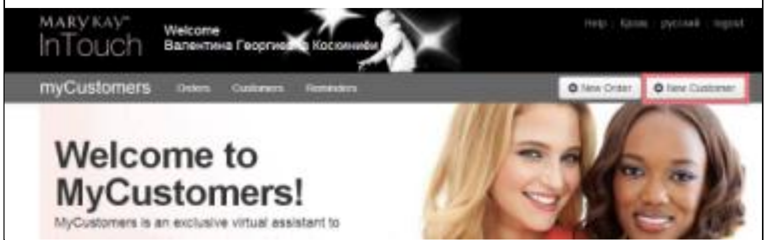
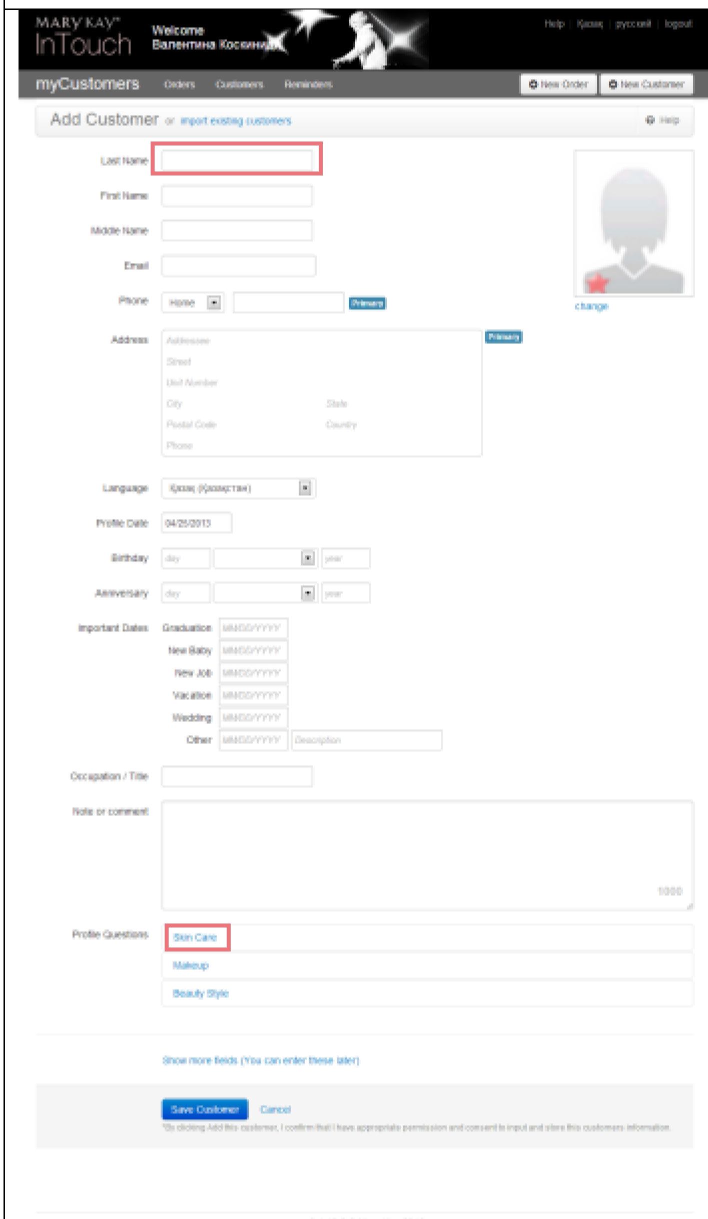
Click myCustomers to return to the Home page
Click Orders, Customers, or Reminders to go to their respective pages
Click New Order to select a customer from the customer list and create a new order
Click New Customer to add a new customer to your customer list or create and order for that customer
</td>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

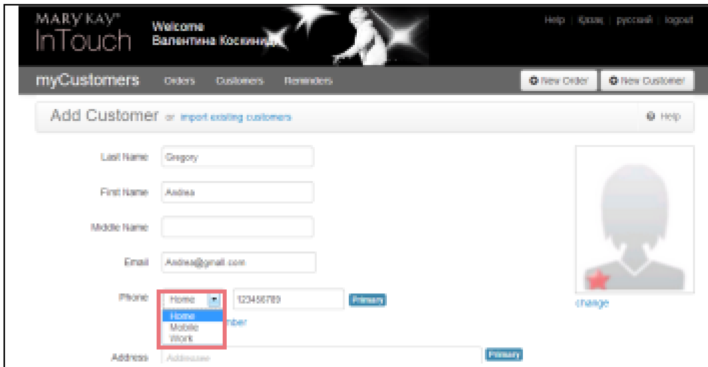
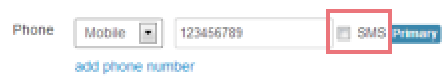
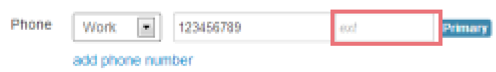
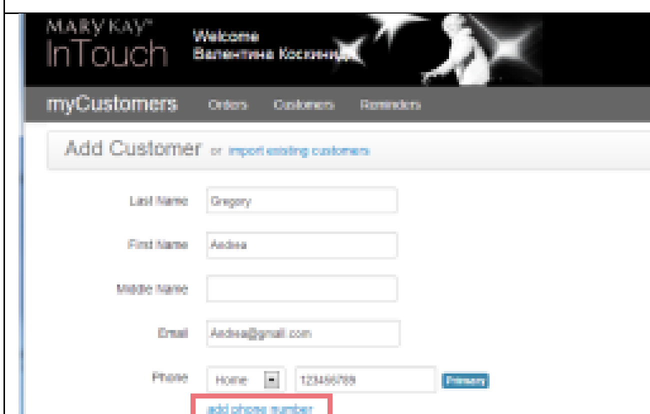
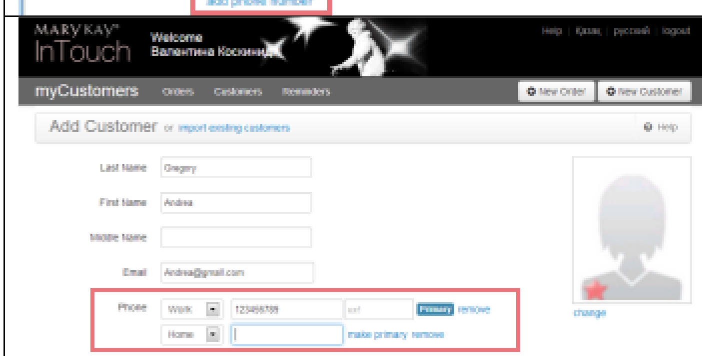
	**Dashboard section** • 3 options are available – **Customers**, **Orders** and **Reminders** • Click anywhere on **Customers**, **Orders** or **Reminders** to open the page you need or click the **Manage Your Customers**, **Manage Your Orders** or **Manage Your Reminders** buttons • The **Customers** 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**

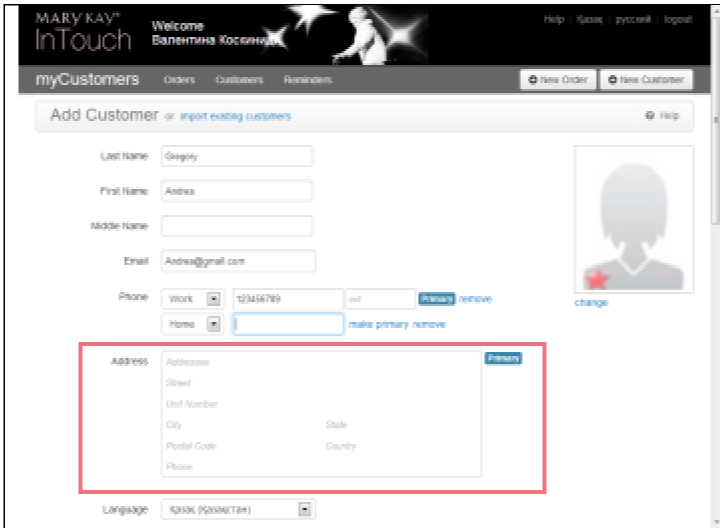
Adding Customers to myCustomers

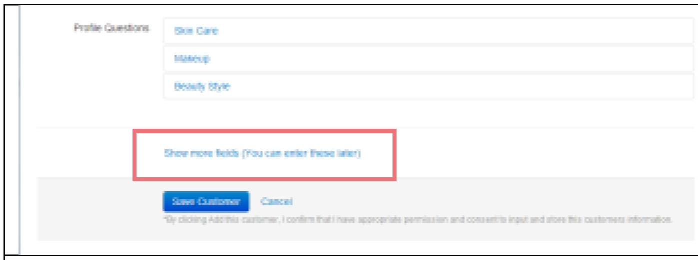
	myCustomers makes adding customers easy and quick. You can, • Add a new customer • Import customers from Facebook • Import customers from Email • Upload a picture

How to Add a New Customer

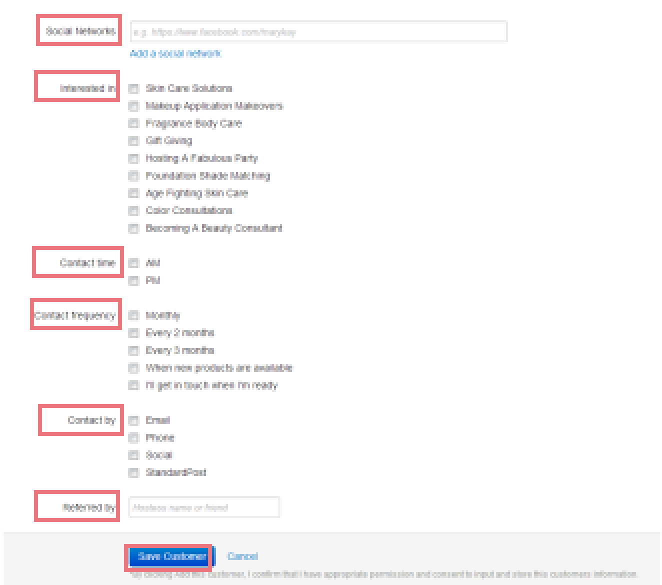
	To add a new customer in myCustomers on the **Navigation Bar**, click **New Customer.** The **Navigation Bar** is visible throughout myCustomers.
	The **Add Customer** page opens. The **Add Customer** page contains similar information to the **Customer Profile** so you can store all of your important 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. To begin, click inside each open field (or press the **Tab** key to move between fields) and enter the required information. To open and unopened field, click the "explanation." An open field displays.

	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.
	If **Mobile** is selected, an **SMS** checkbox is added.
	If Work is selected, the **Extension** field is added.
	To add a phone number, click the link**, Add Phone Number.**
	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**.

	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**.
	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.
	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.



The Additional fields are available by clicking **Show More Fields**.

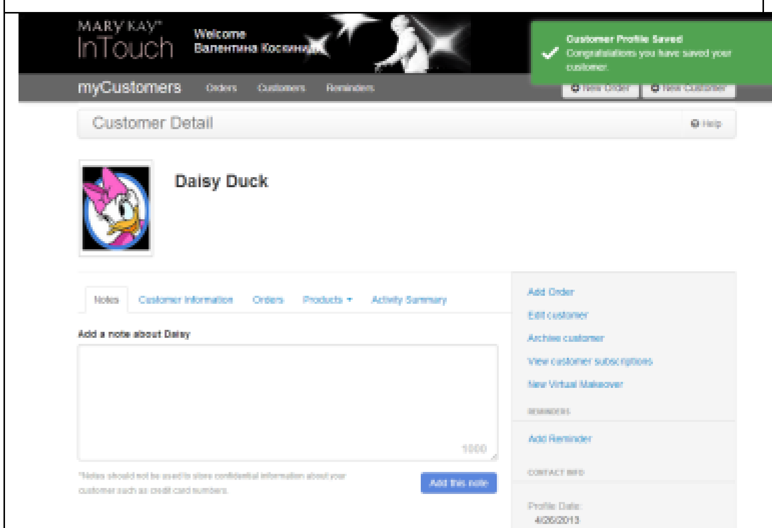


The following additional questions are displayed,

- Social Networks
- Interested in
- Contact Time
- Contact History
- Contact By
- Referred by

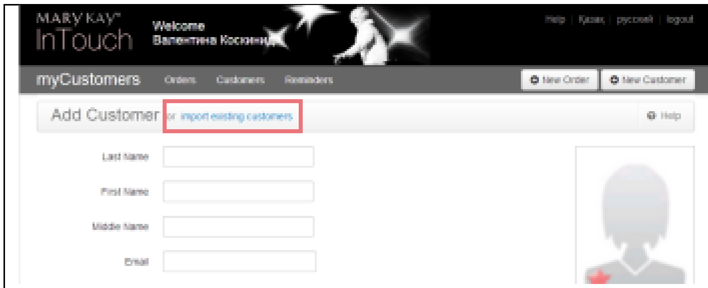
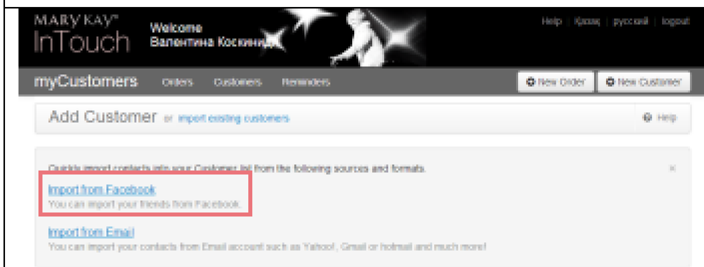
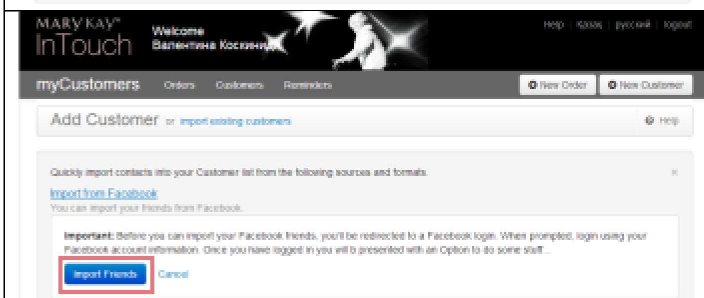
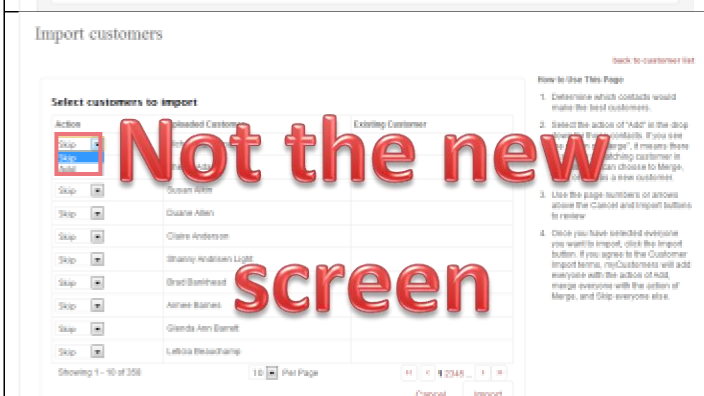
When you are finished, click **Save Customer**.

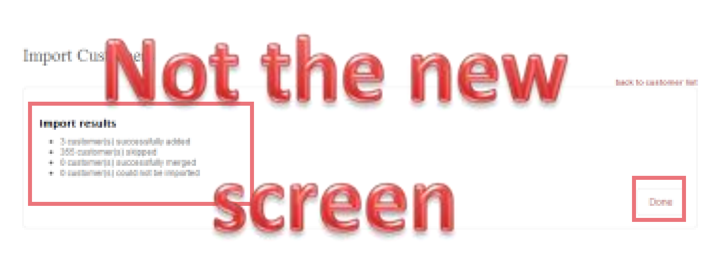
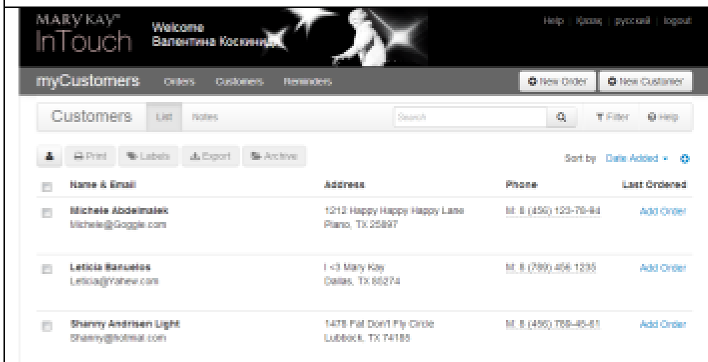
If you decide not to add the customer, click **Cancel**.



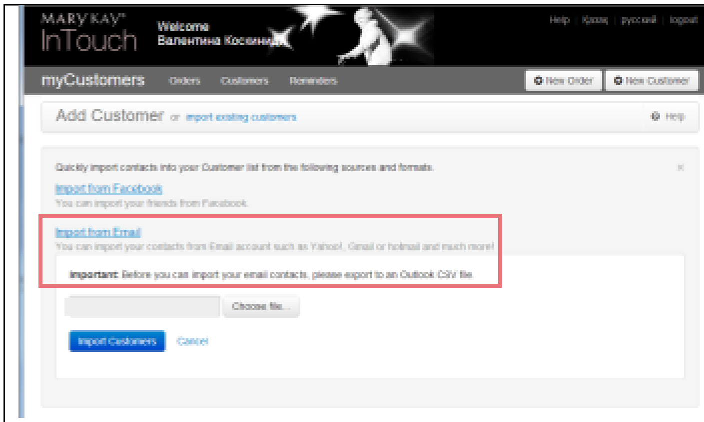
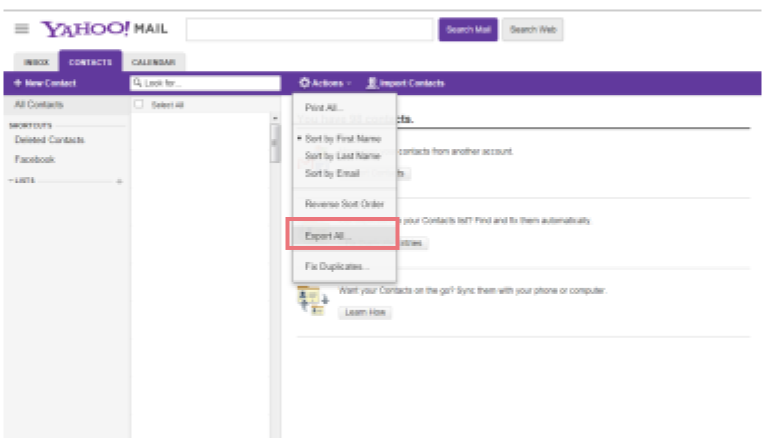
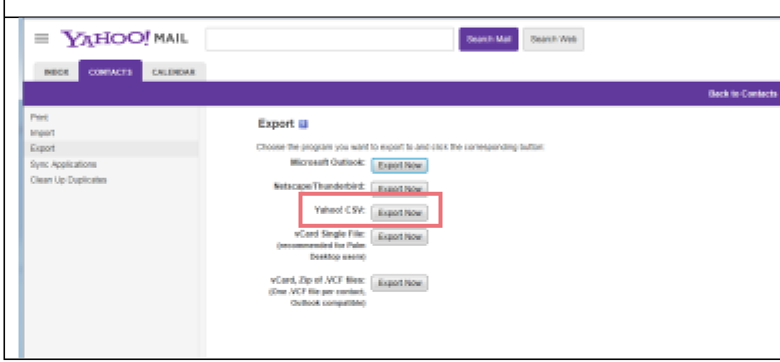
A **Confirmation** screen displays to confirm the customer's information was successfully saved.

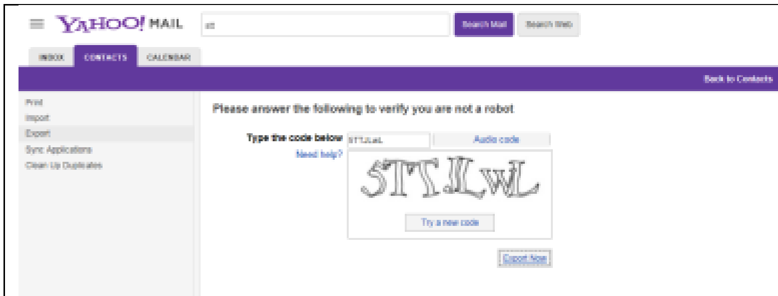
How to Import Customers from Facebook

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

	Actual procedure is not working. May need to redo once functioning as it should. A recap of the import is displayed. Click **Done**.
	The customer list displays. To view the customers you added, click Sort By and select Date Added from the drop-down menu. Customers who were added most recently are listed first.

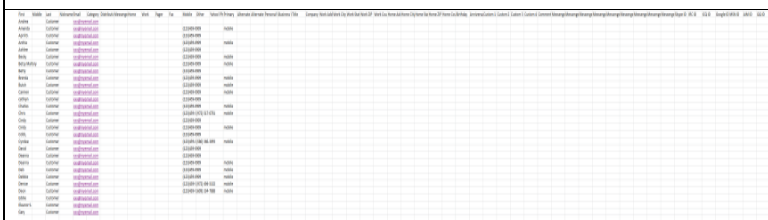
How to Import Customers from Email

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

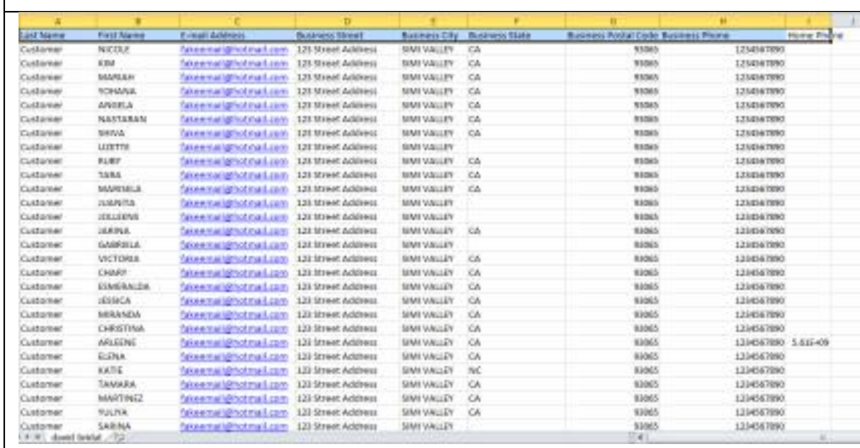


To ensure security, you may be asked to enter a code. If not, you may skip this step.

Click Export Now to complete creating the **CSV** file.

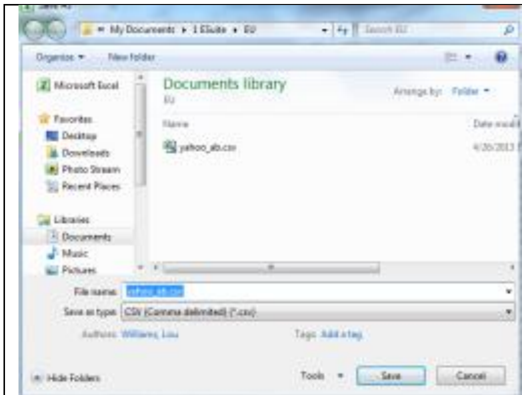
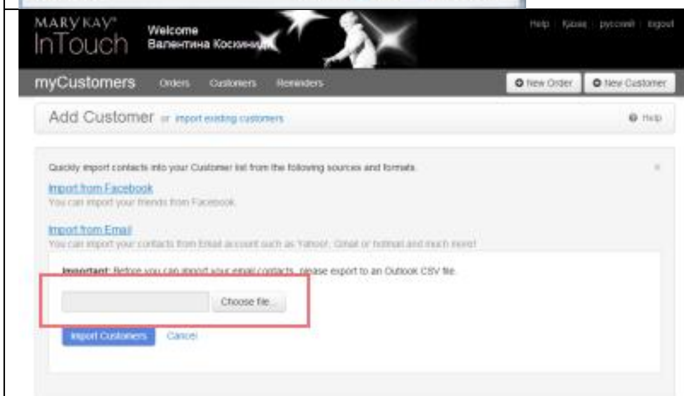
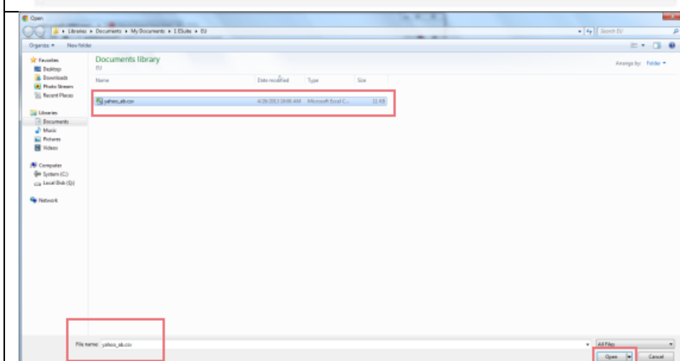
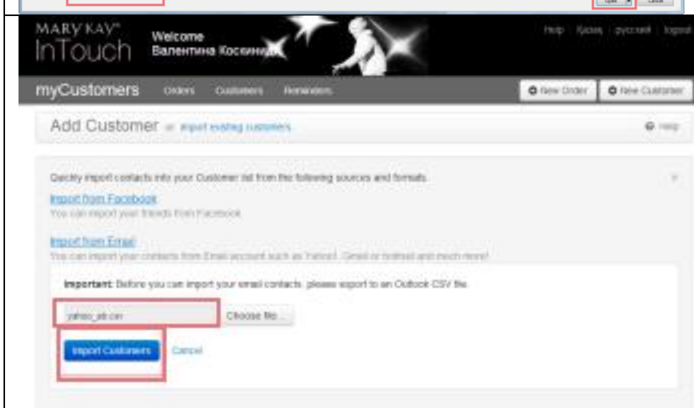


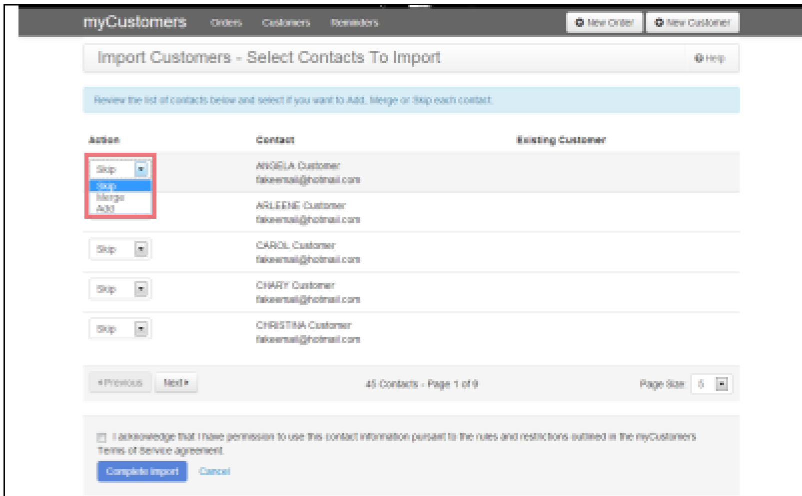
The file is automatically created in Excel.
However it still may not meet the requirement that it is in the Outlook CSV format.



To meet the Outlook CSV format requirement, column headers may need to be revised or columns deleted.
The required column headers are:

- Last Name
- First Name
- Email Address
- Business Street
- Business State
- Business Postal Code
- Business Phone
- Home Phone

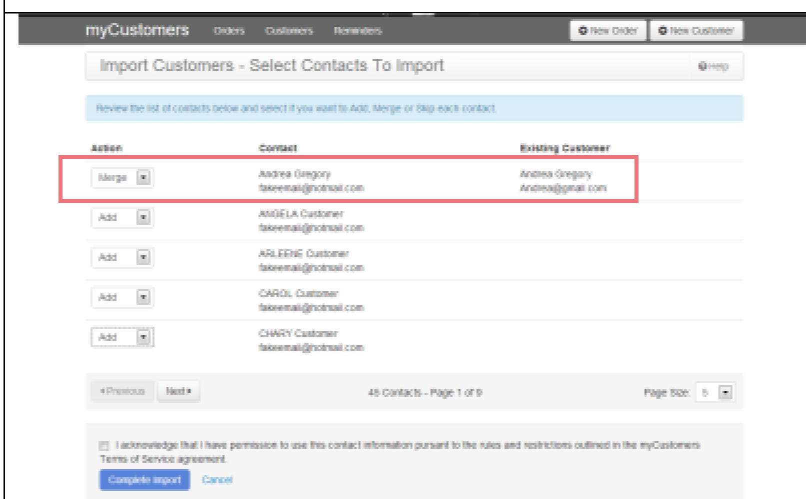
	You will be given the option to save the file. Be sure to save it where you can find it again under a name you will recognize in the CSV format. Click **Save**.
	Click Choose File to find the CSV file you created.
	The **Open File** screen displays. Click the CSV file to select it. The name of the file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

<table>
<tr>
<td>


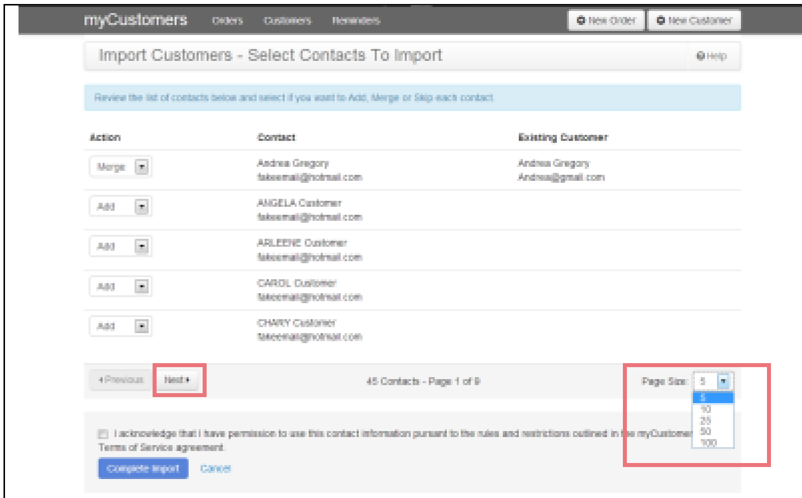
</td>
<td>
The Import Selection screen displays where you have the option to Skip, Merge or Add each customer

Use Skip if you don’t want to add a customer.

Use Merge to add additional information for an existing customer. Existing customers are

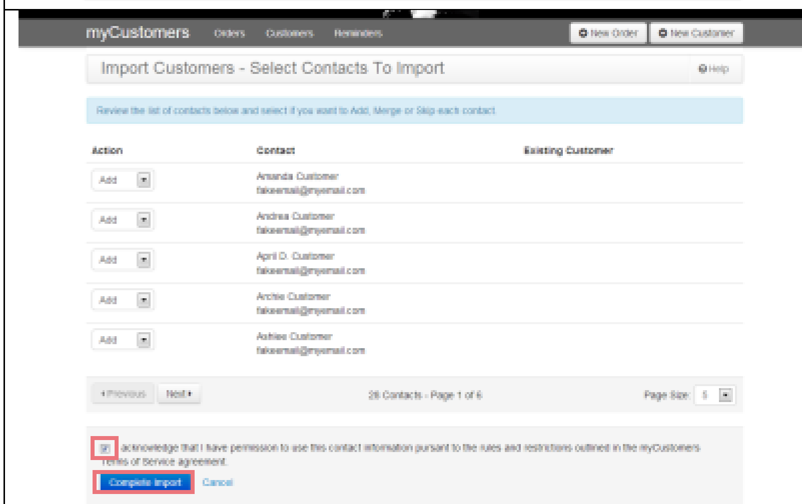
Use Add to enter a brand new customer.
</td>
</tr>
<tr>
<td>


</td>
<td>
Existing customers are recognized by the system and a notification is displayed.
</td>
</tr>
</table>



Increase the number of customers by changing the **Page View** number.

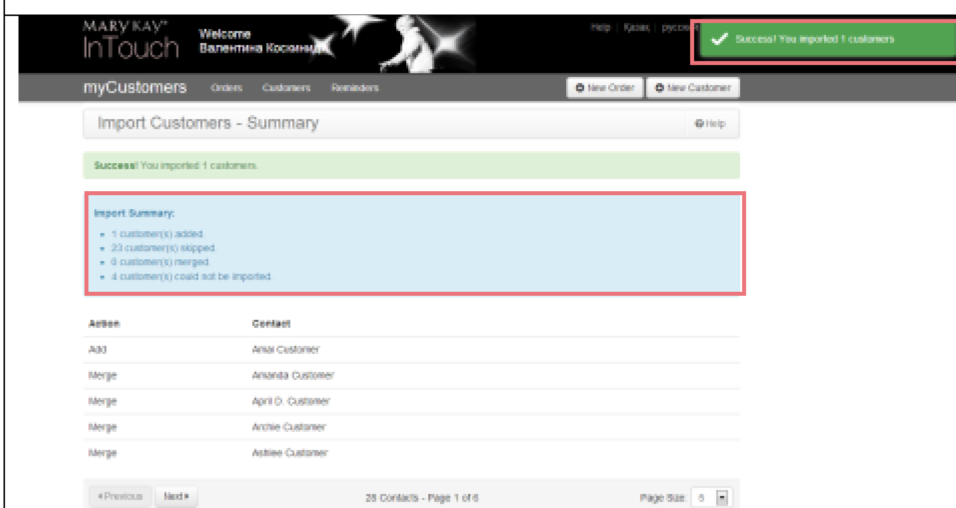
Click **Next** to move to the next page and continue.



When you are finished, if you agree and would like to continue, click the **Terms of Agreement** checkbox.

Click **Complete Import**.

This can take a few minutes, so please be patient.

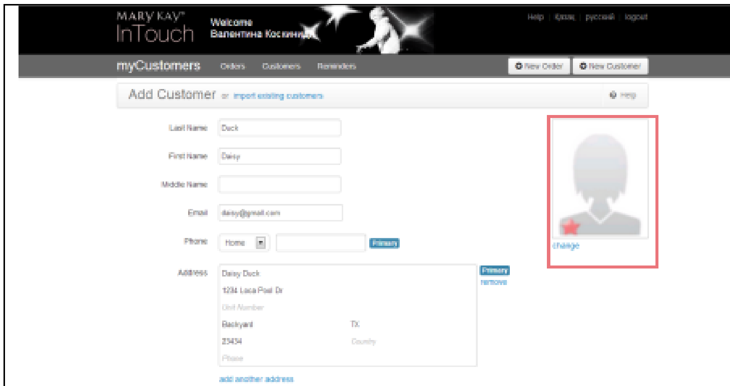
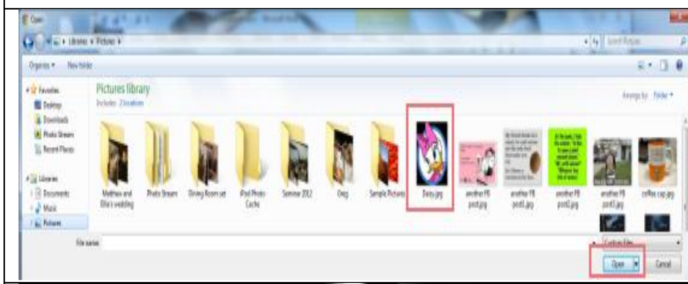
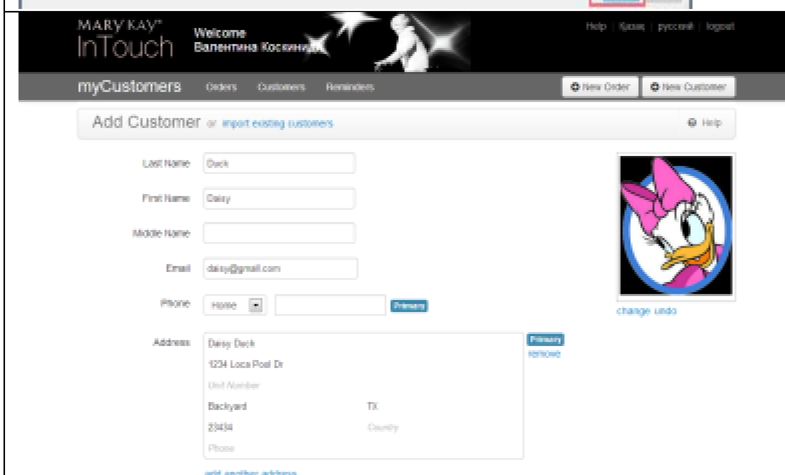


A **Confirmation** screen displays that the import was successful.

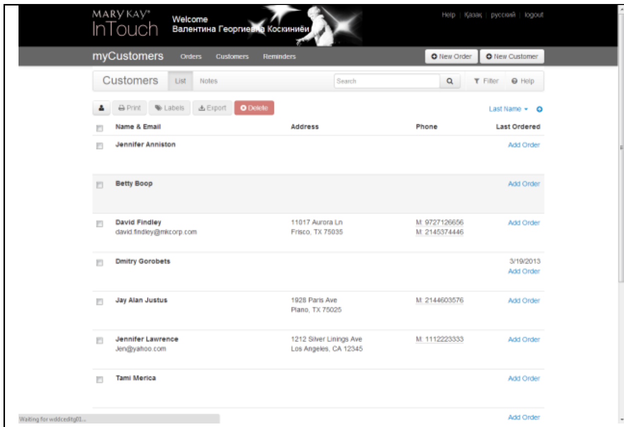
A recap displays to let you know which customers imported successfully and who did not.

To leave this screen click an option on the **Navigation** bar.

How to Add Your Customer’s Picture

	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. To add your customer’s picture, click **Change**.
	The **Open File** screen opens. Find the customer’s picture. Select the picture. Click **Open**.
	The customer’s picture you selected is displayed.

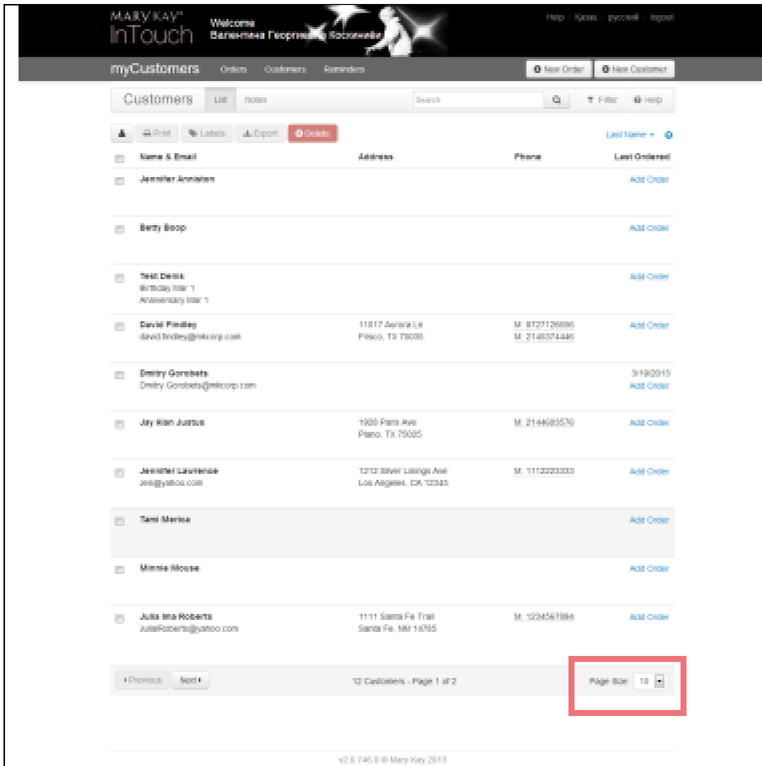
Customers



In the **Customers** page you can,

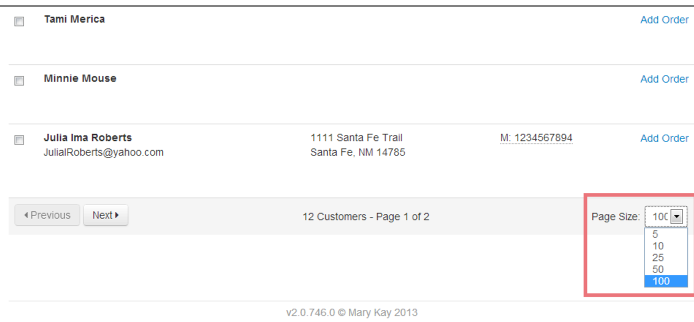
- How to View your Customer List
- How to use Search
- How to use Advanced Search
- Filter customers based on pre-defined criteria such as, *Date Added, Last Order Date, Birthday or Anniversary*.
- View customer notes
- Search customer notes
- Print customer lists for individually selected customers.
- 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

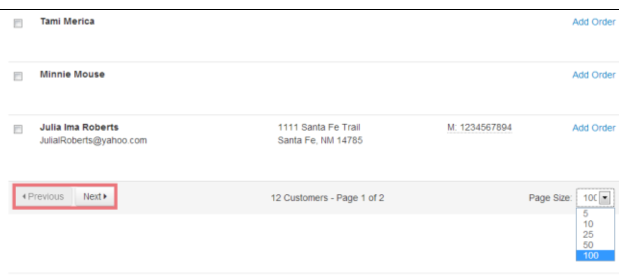


Click **Customers** to open a list of your customers.

The default number of customers viewable on a page is 10.

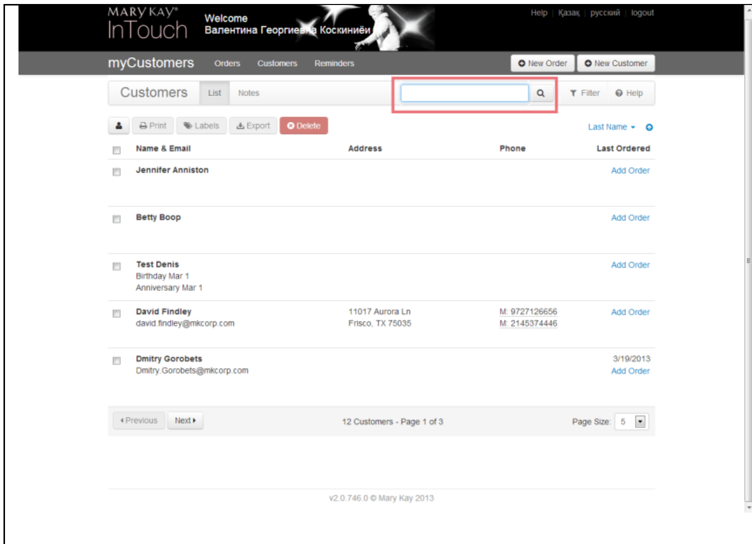
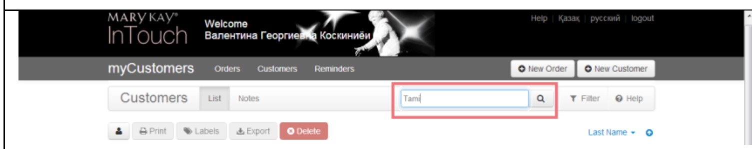
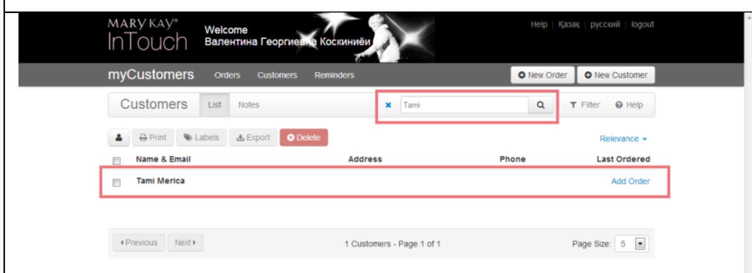


Change the number of customers viewable on a page to less or more than 10 by clicking the down arrow by the **Page Size** field and selecting the number of customers you would like to view on each page. The maximum number of customers that can be viewed on a single page is 100.

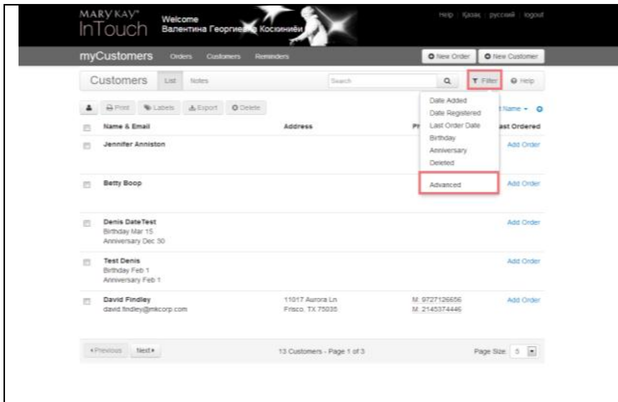
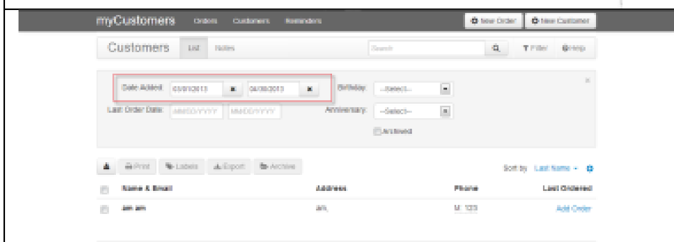
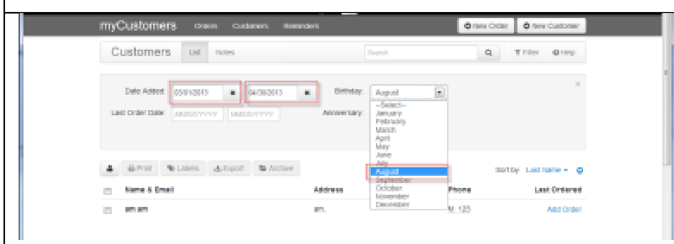
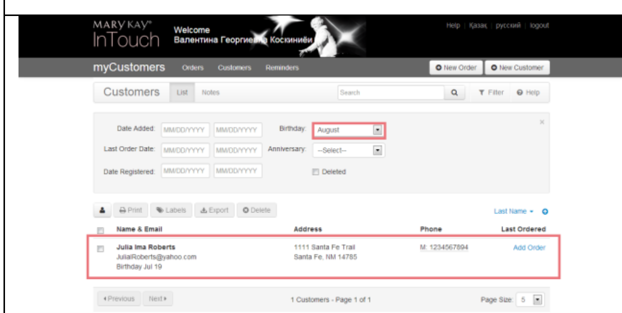


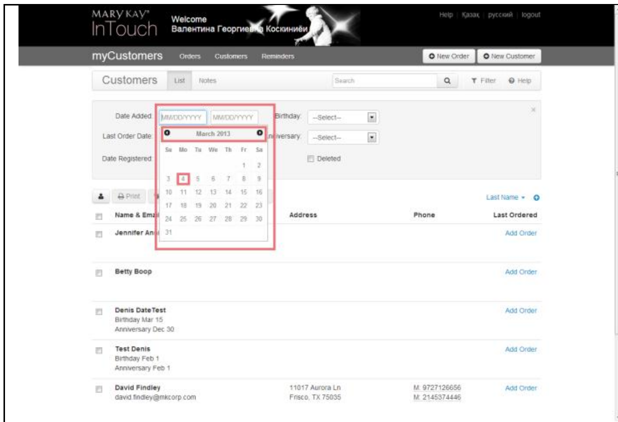
Click the **Previous** and **Next** buttons to move between pages

How to Search for a Customer

	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.
	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.
	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

	**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**.
	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.
	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.

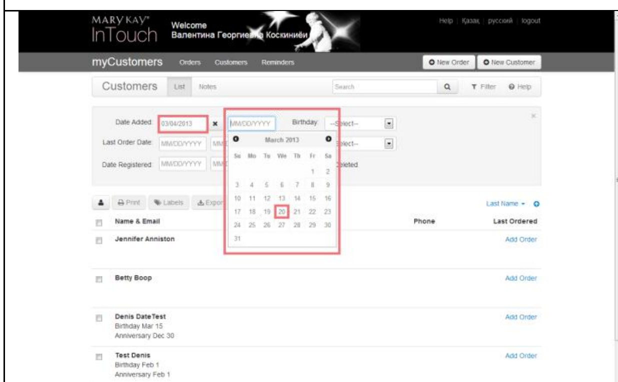


Searching a specific date range is easy. For this example, let's use the **DATE ADDED** date range fields.

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.

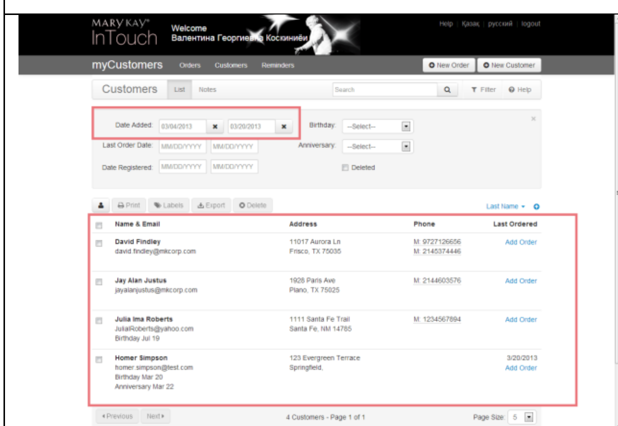
If you need a specific day, click the day. For this example we selected the 4th of March.



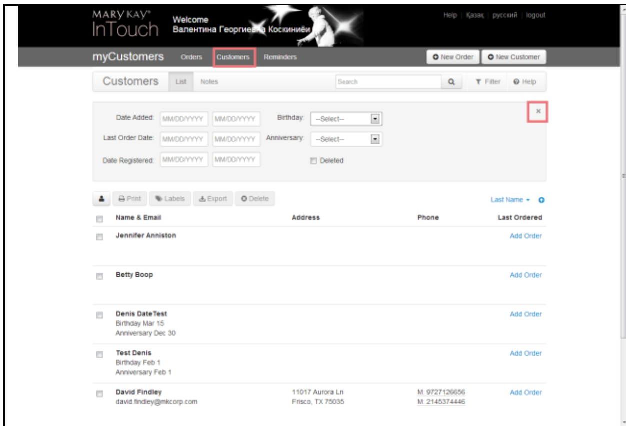
The date is added immediately after you selected the day.

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.



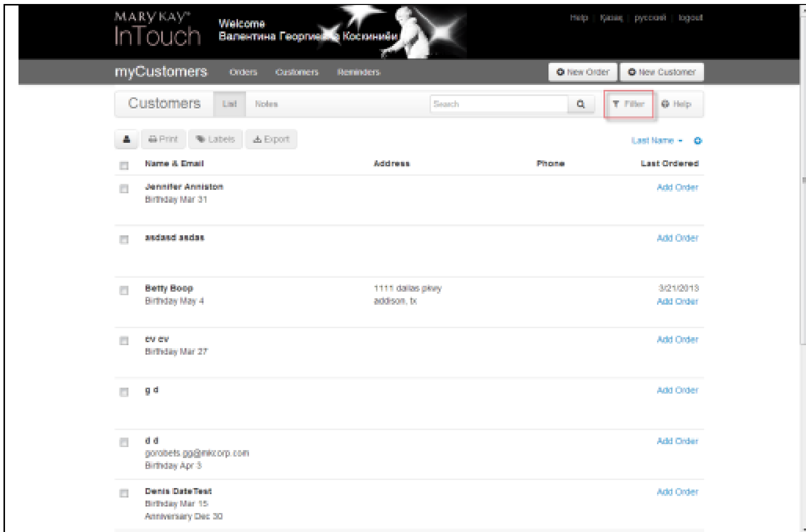
Anyone added to your customer list within the defined date range is automatically displayed.



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

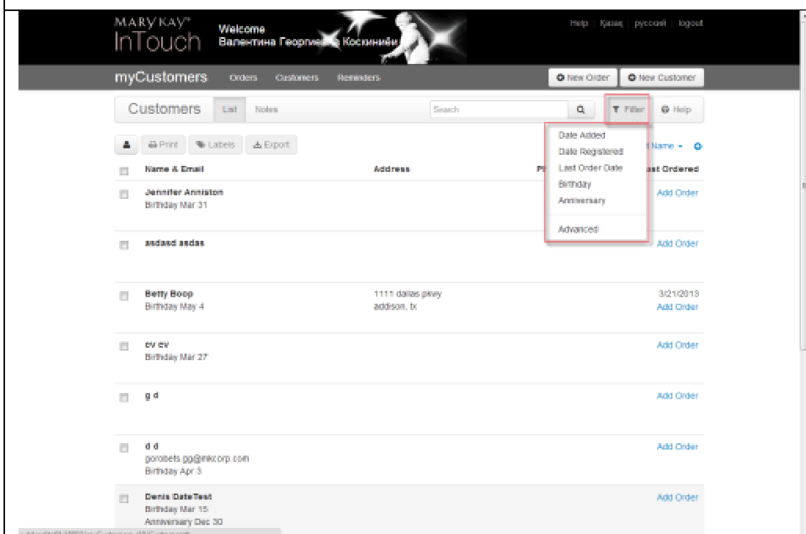
To return to the complete customer list, click **Customers** in the **Navigation Bar**.

How to Filter Customers



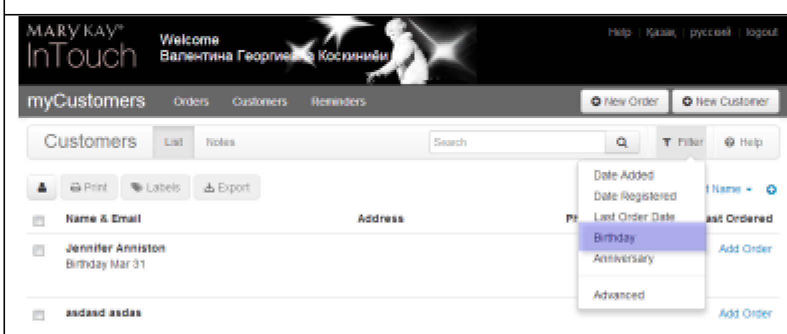
Use the filter on the **Customer List** page to quickly sort customers into a specified group.

To begin, click **Filter**.

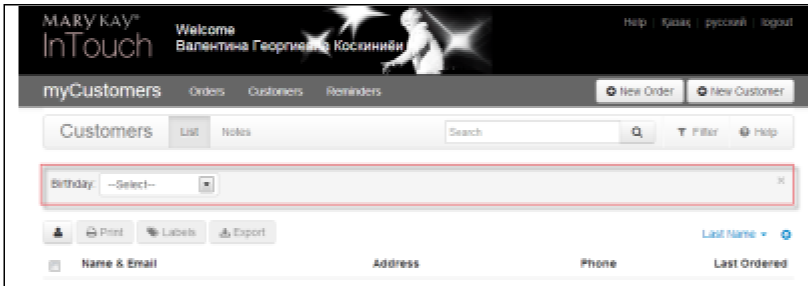
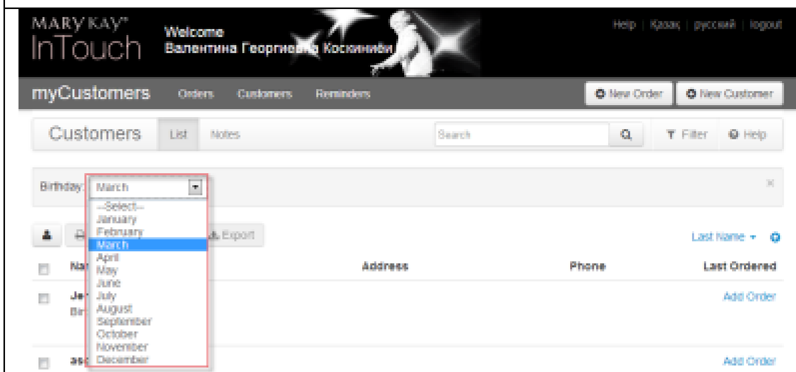
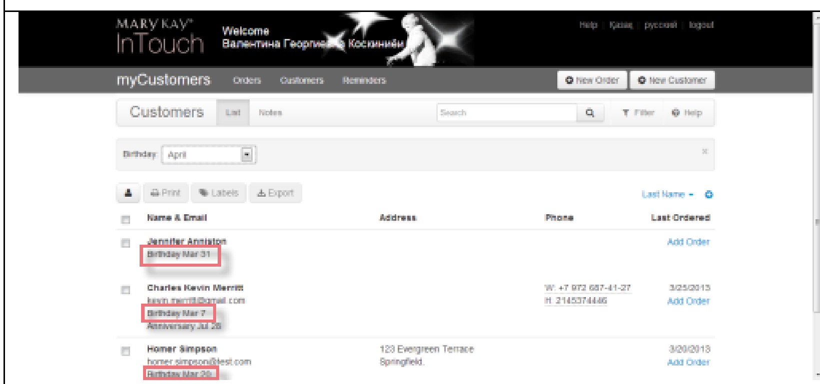


A drop-down menu displays featuring pre-defined filter criteria, such as *Date Added, Last Order Date, Birthday or Anniversary*.

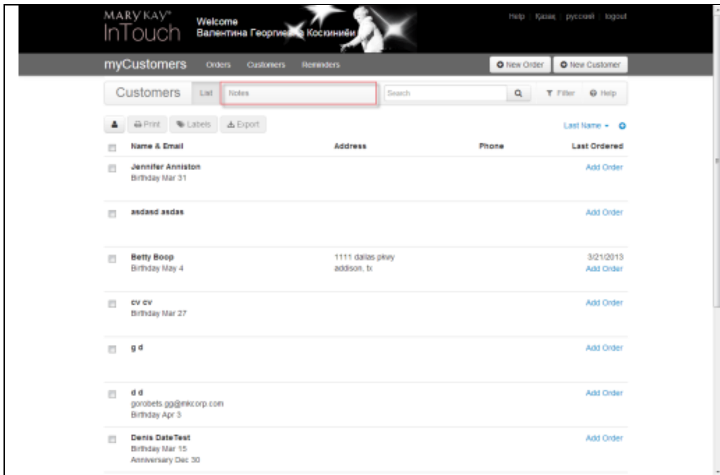
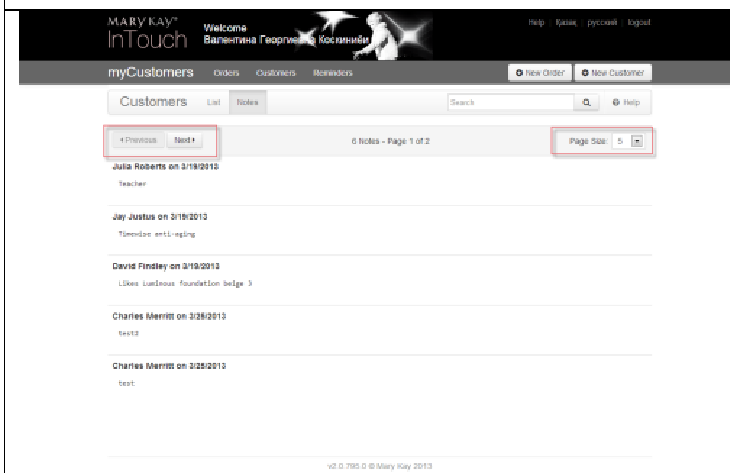
Select a category.



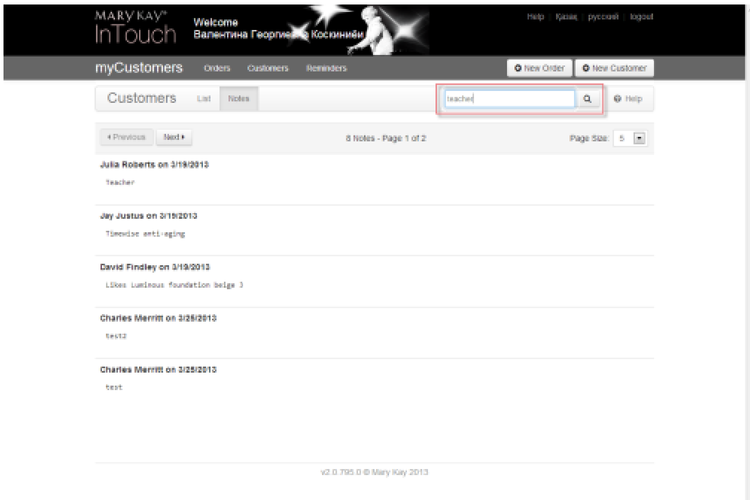
For this example we select "Birthdays"

	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

	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**.
	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.

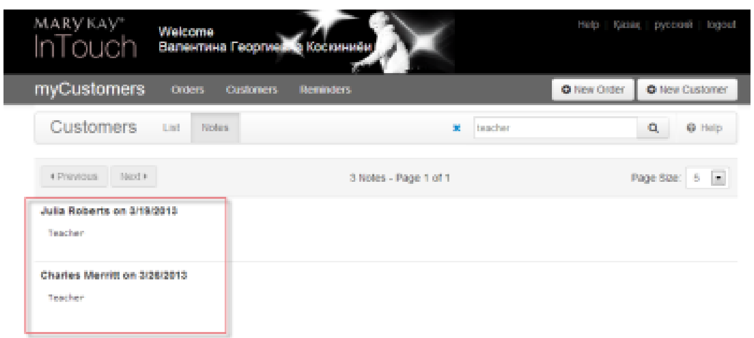
How to Search Customer Notes



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

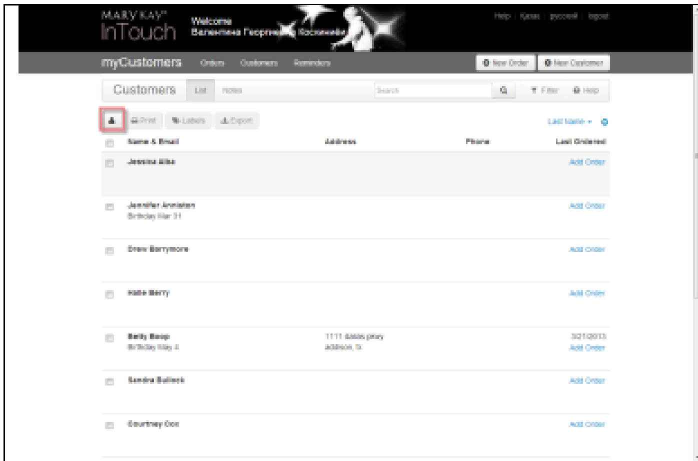
Type the word in the Search field. Press ENTER or select the magnifying glass.

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



The search results are displayed.

How to View the Customer List With or Without Pictures

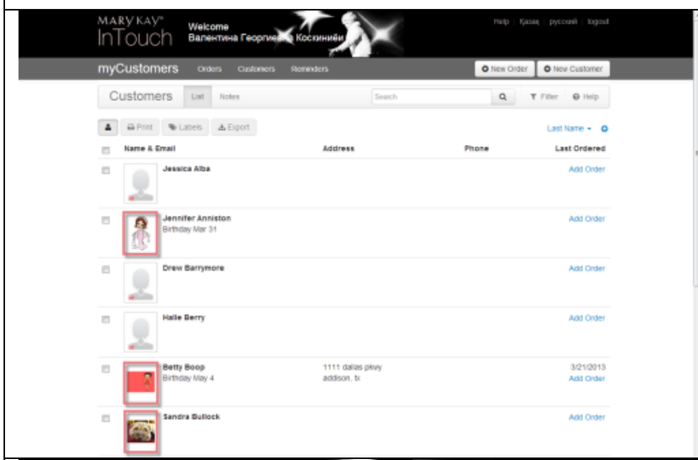


In myCustomers either you or the customer can upload the customer's picture.

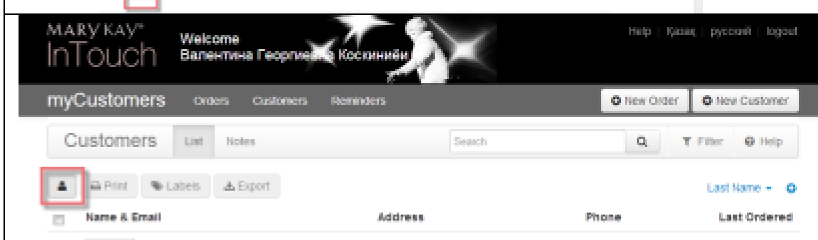
The Customer List can be viewed with or without customer pictures.

The default view is without pictures.

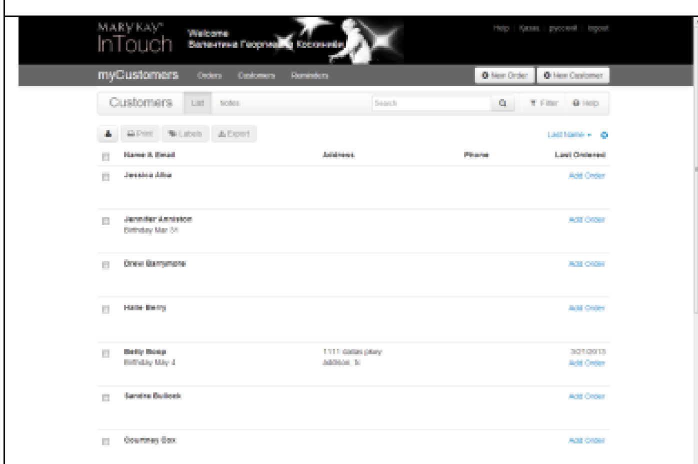
Click the "Person" icon to view the list with pictures.



Pictures are displayed. If a customer does not have a picture uploaded then a gray profile is displayed as a placeholder for the picture.

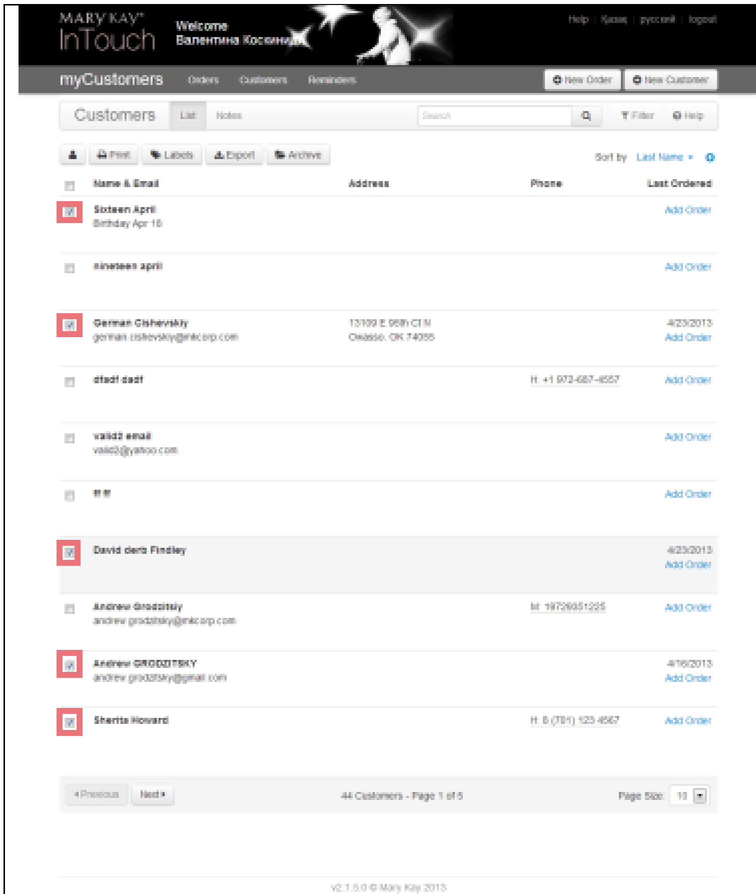
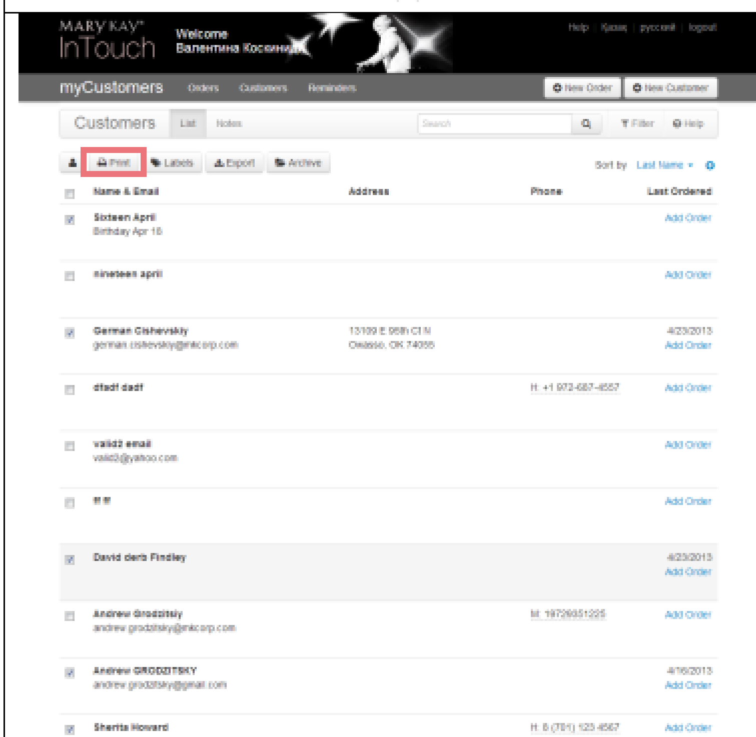


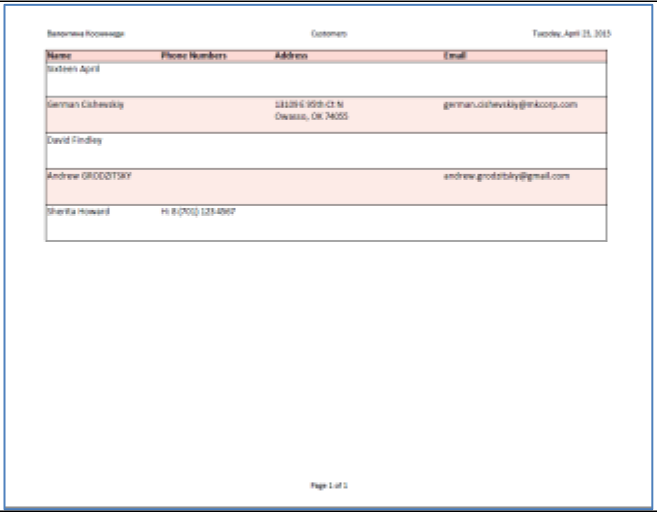
To return to just the list view, click the icon again.



The Customer List displays without pictures.

How to Print a List of Selected Customers

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



Customers

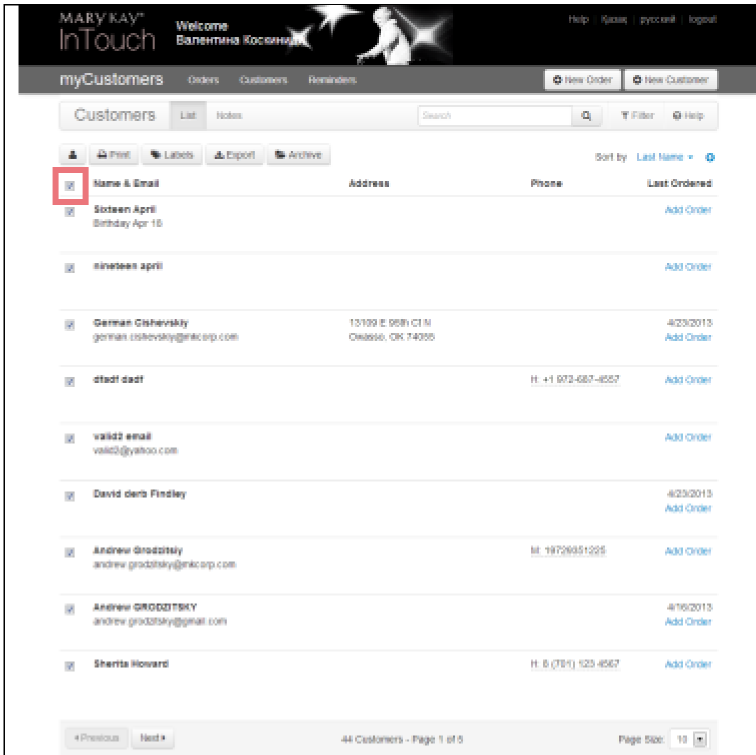
Name	Phone Numbers	Address	Email
Sixteen April			
German Cishevskiy		13109 E 95th Ct N Owasso, OK 74055	german.cishevskiy@mkcorp.com
David Findley			
Andrew GRODZITSKY			andrew.grodzitsky@gmail.com
Sherita Howard	H: 8 (701) 123-4567		

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.

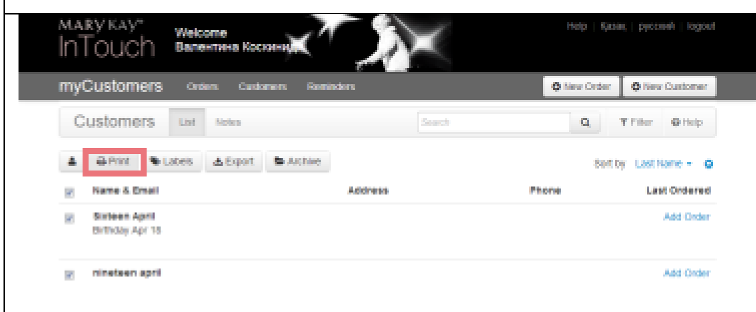
How to Print a Complete Customer List



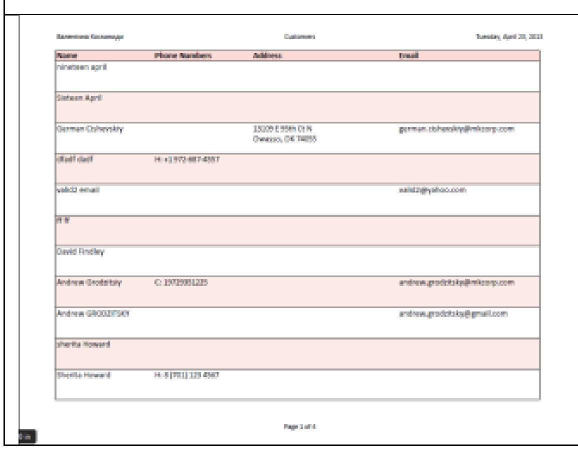
Use your Customer List to help you print a list of all of your customers.

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.



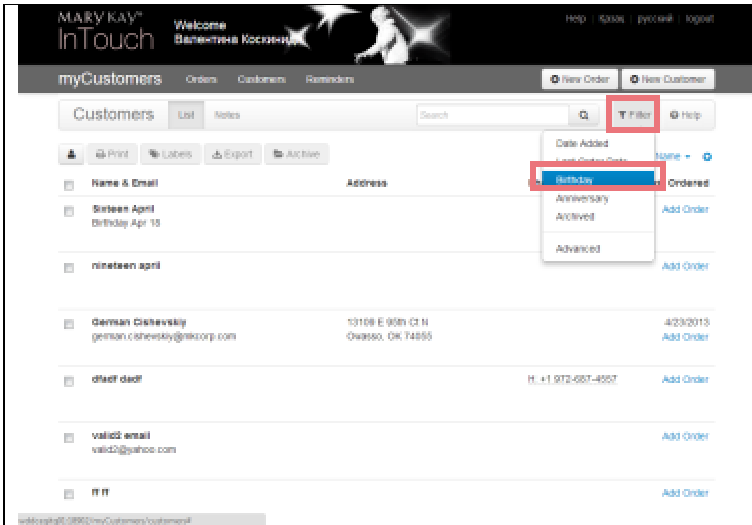
To print the list, click **Print.**



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.

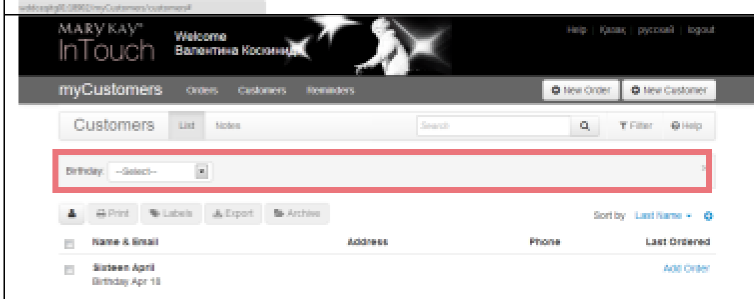
How to Print a Filtered Customer List



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

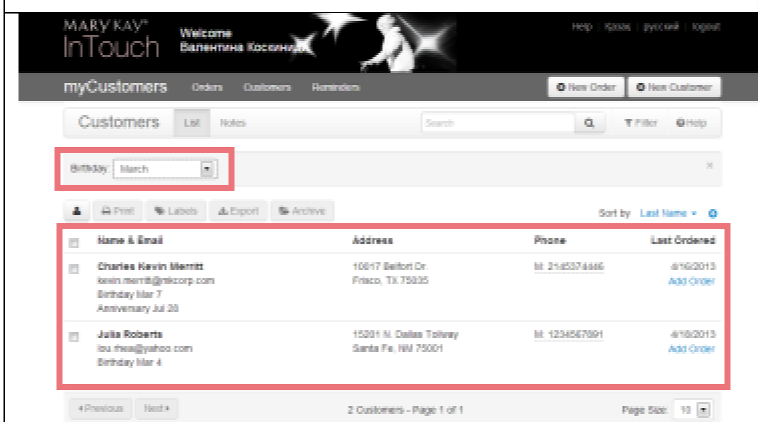
Click **Filter** and select the **category** from the drop-down menu.

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

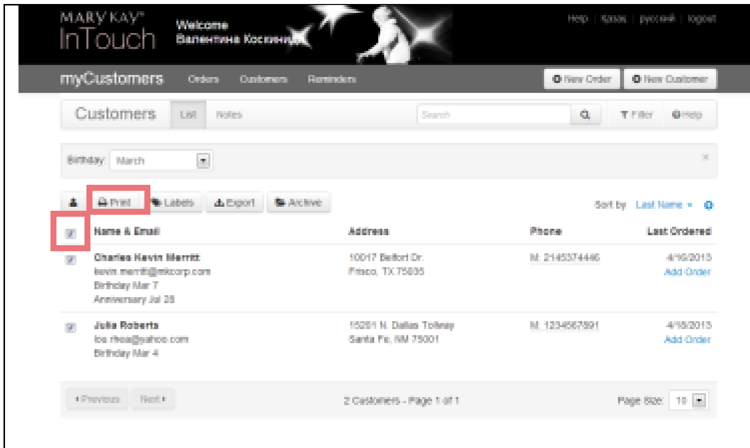


The Birthday selection field displays.

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

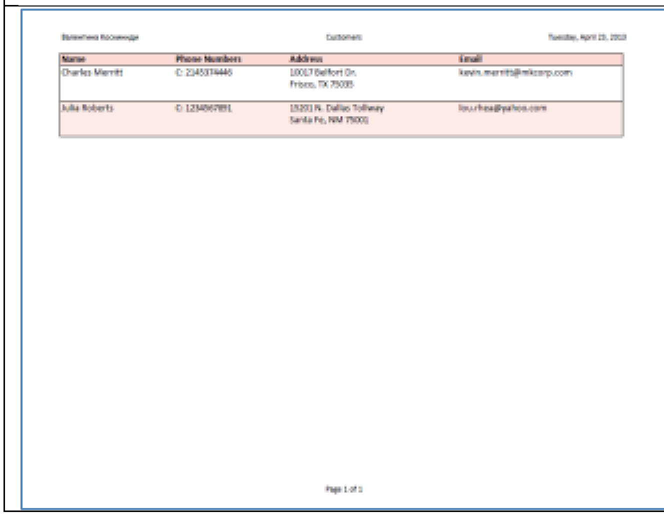


A list of customers with March birthdays is displayed.



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

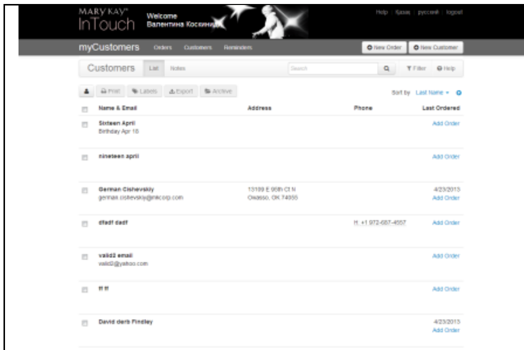
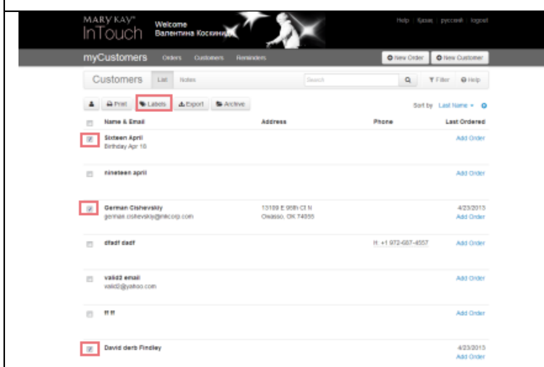
Click **Print.**



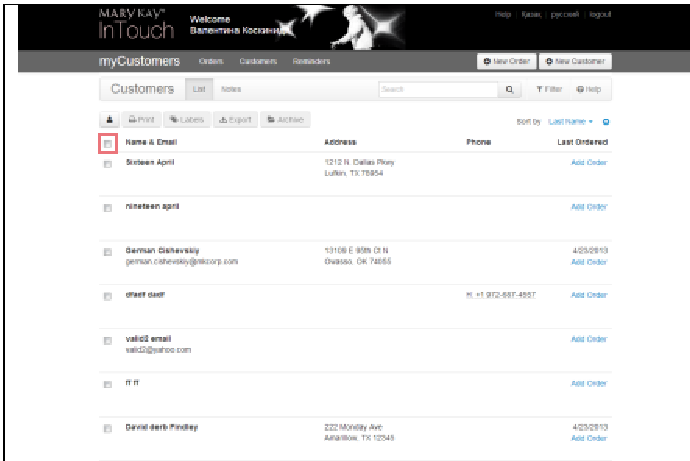
A list of your customers with March birthdays is created and displayed in a PDF format. The document can be saved or printed.

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

How to Create Labels Using Selected Customers

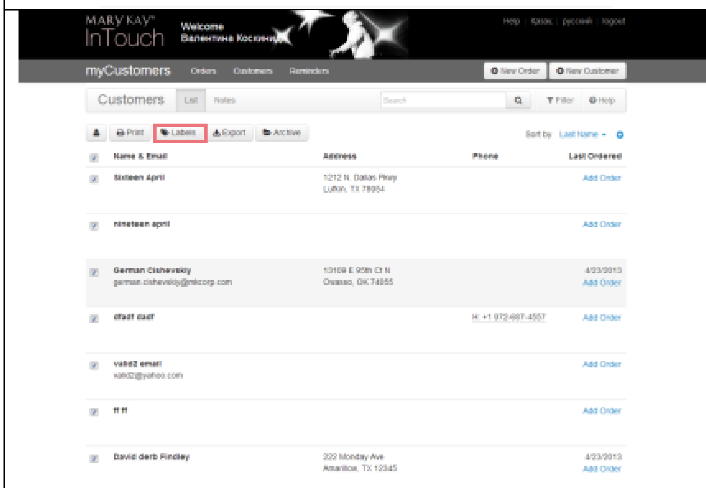
	Use the customer list to help you create a file to use for printing labels. Labels can be created for individual customers, all customers or groups of customers. If you wish to create labels for individual customers, select just the customers you for whom you need labels. Open **Customers.** The customer list is displayed.
	To select customers one by one, click the **checkbox** beside each customer. Selecting the checkbox also activates the **Labels** button. To create the label file, click **Labels**
Sixteen April 1212 N. Dallas Pkwy Lufkin, TX 78954 German Cishevskiy 13109 E 95th Ct N Owasso, OK 74055 David Findley 222 Monday Ave Amarillow, TX 12345	A PDF document you can save and use to print labels is created.

How to Create Labels for All Customers



Use the Customer List to help you to create a file of all of your customers that you can use to print label.

To begin, click the **Select All checkbox** beside the column header, Name & Email.



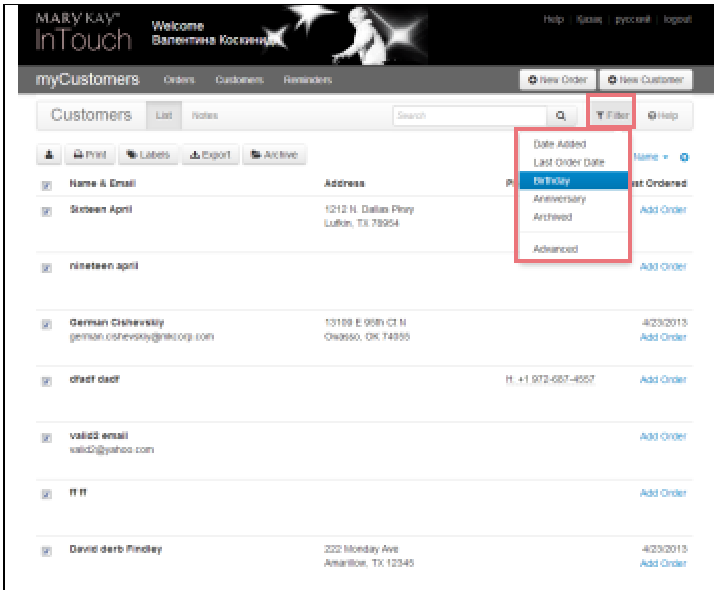
The **checkbox** for each customer on all pages is checked automatically and the **Labels** button is activated.

nineteen april	Sixteen April 1212 N. Dallas Pkwy Lufkin, TX 78954	German Cishevskiy 13109 E 95th Ct N Owasso, OK 74055
dfadf dadf	valid2 email	ff ff
David Findley 222 Monday Ave Amarillow, TX 12345	Andrew Grodzitsiy	Andrew GRODZITSKY
sherita Howard	Sherita Howard	Sherita Howard
Peter Jackson	Peyton Johnson	Shirley Jonsey

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

The layout of the file, 30 labels per page, corresponds to Avery 5160 Labels.

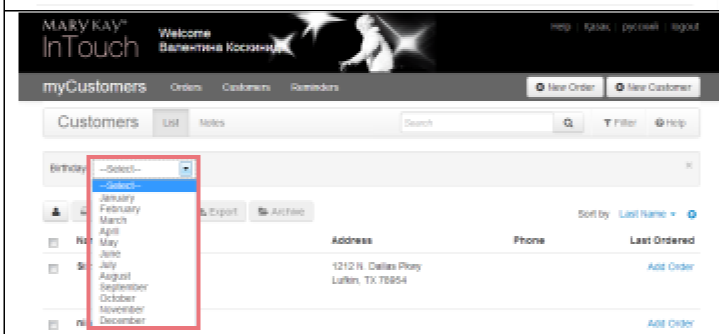
How to Create Labels from a Filtered Customer List



Use the Customer List to help you create a file to use for labels from a customer list that was created using the filter.

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

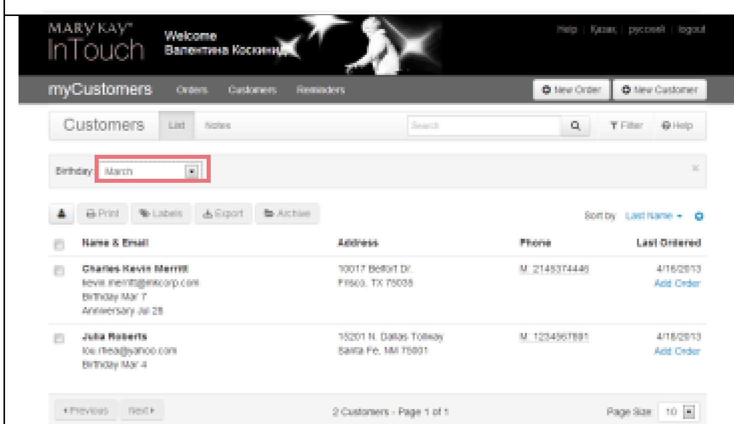
For this example we will use **Birthday.**



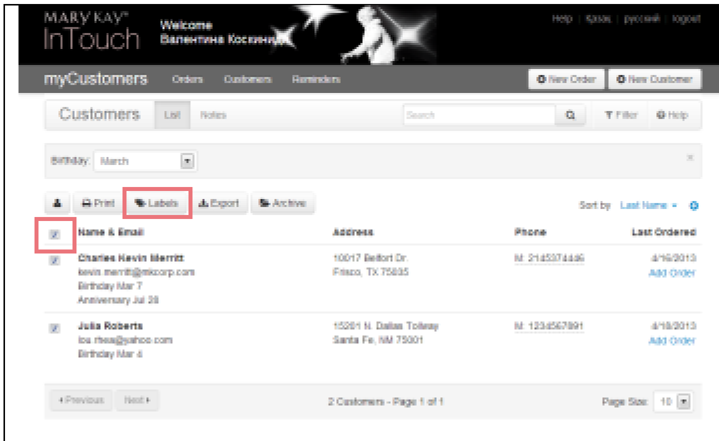
The **Birthday** selection field displays.

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

For this example we will select the month of March.

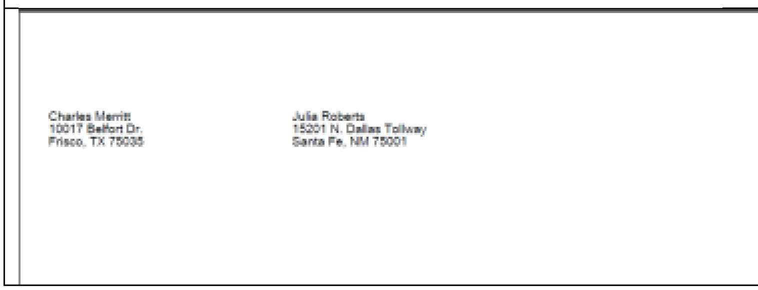


A list of customers with March birthdays is displayed.



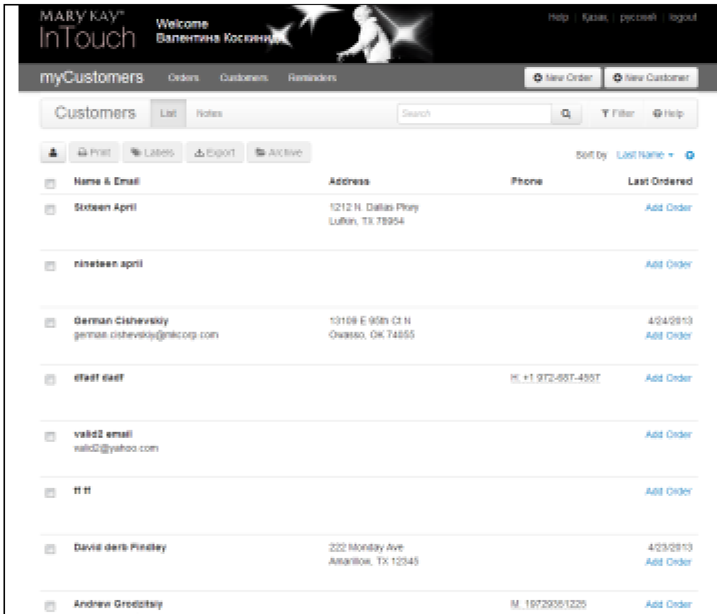
To print the complete list and activate the **Labels** button, click the **Select All checkbox** beside the Name & Email column header.

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



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

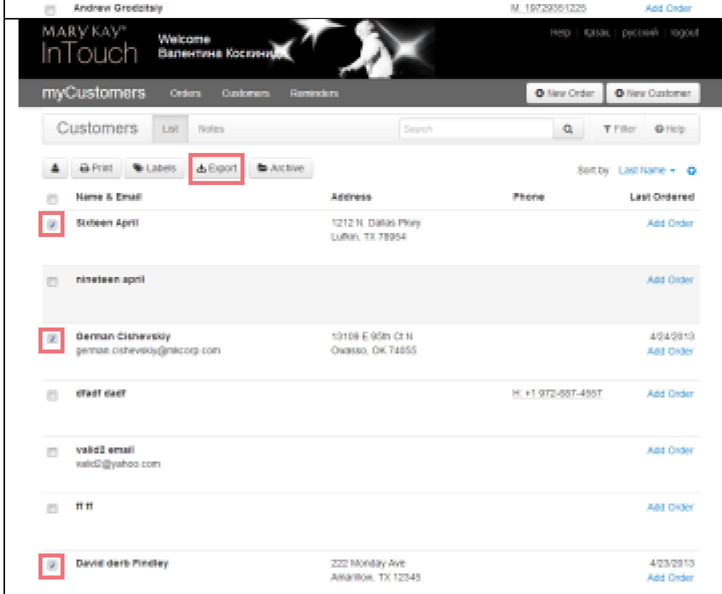
How to Export Selected Customers to an Excel Spreadsheet



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

Open **Customers.**

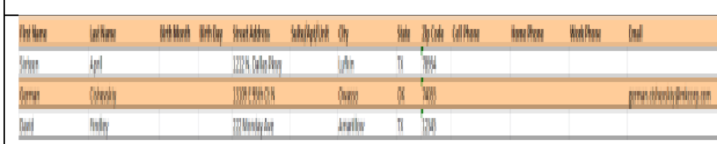
The customer list is displayed.



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

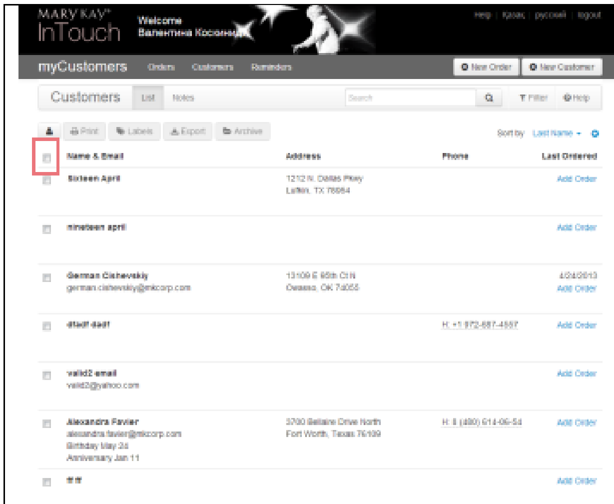
Selecting the checkbox activates the **Export** button.

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



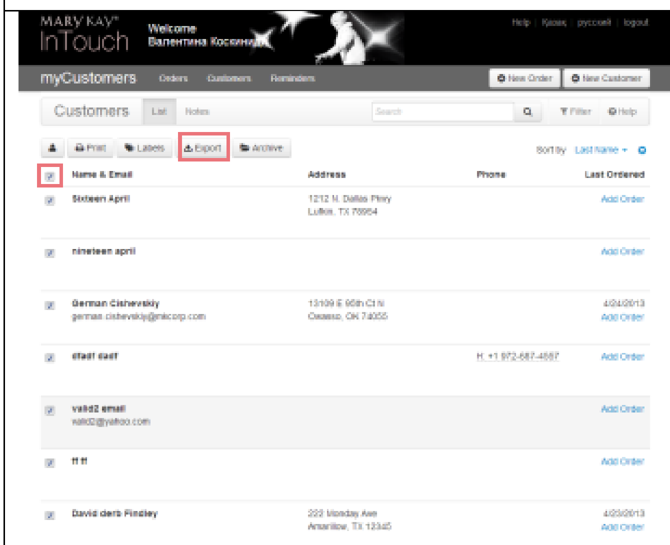
An list of the customers you selected is exported to Excel and is available for you to use.

How to Export All Customers to an Excel Spreadsheet

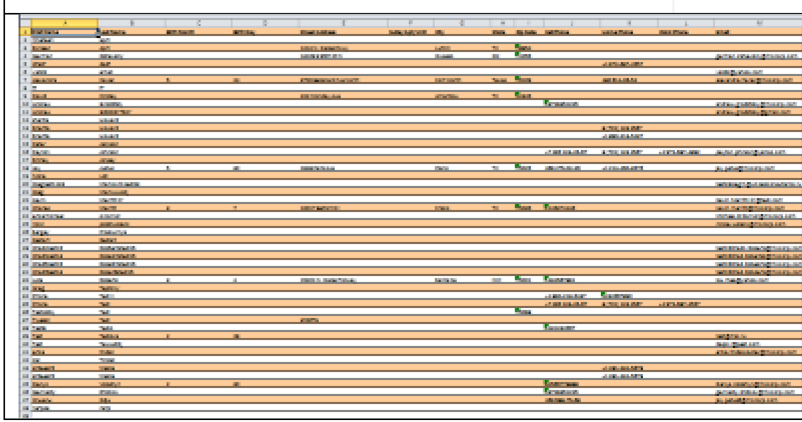


Use the Customer List to create a customer list in Excel of all of your customers.

To begin, click the **Select All checkbox** beside the column header, Name & Email.

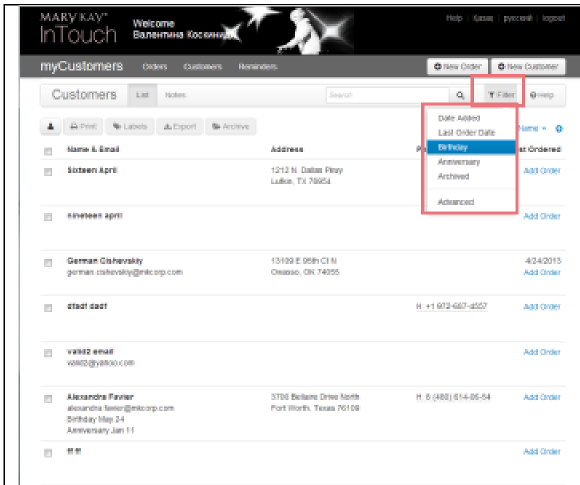
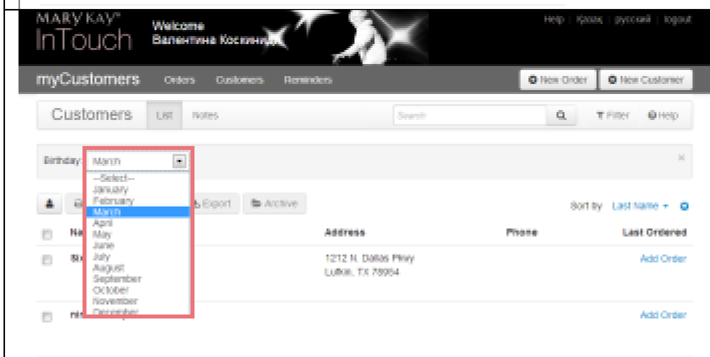
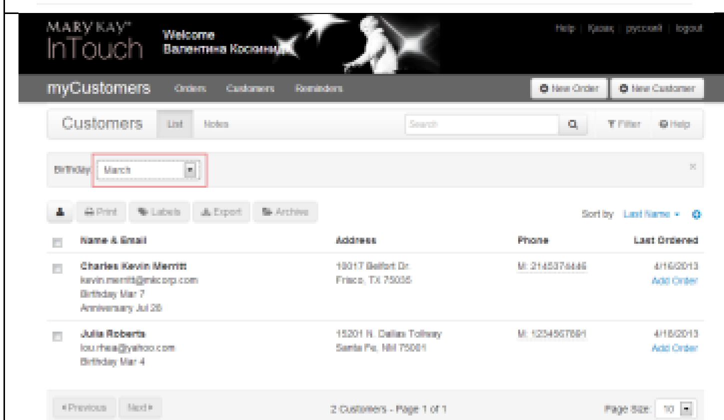


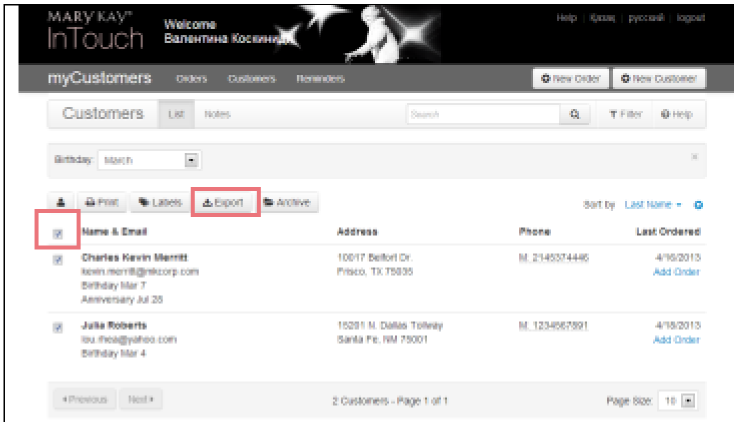
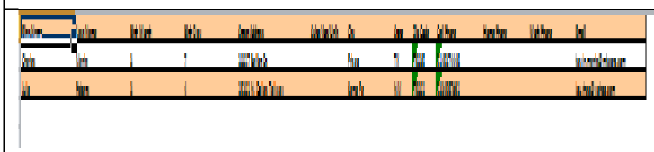
The **checkbox** for each customer on all pages is checked automatically and the **Export** button is activated.



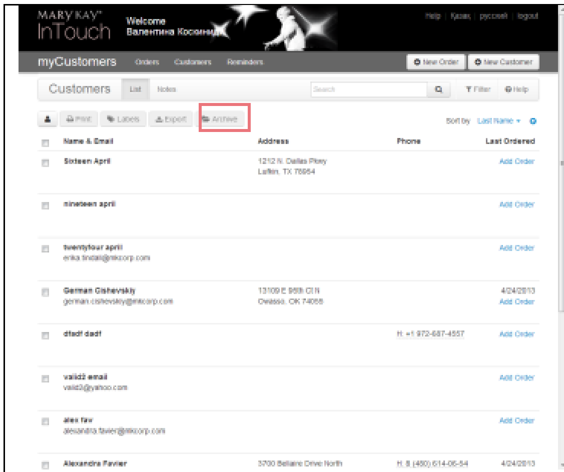
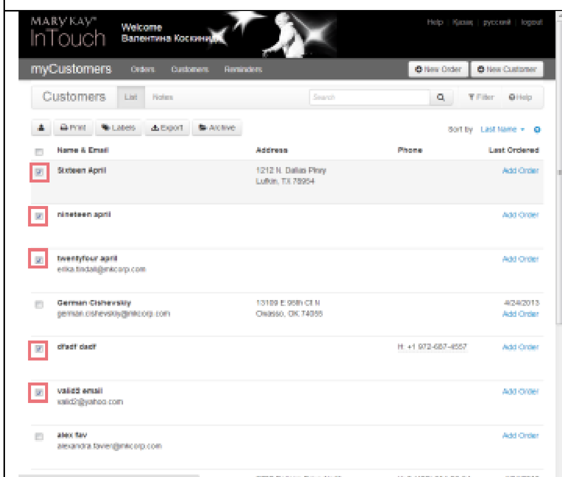
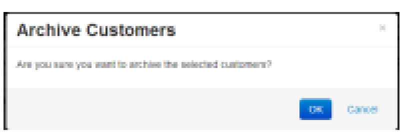
A complete list of your customers is exported to an Excel document and available for you to save and use.

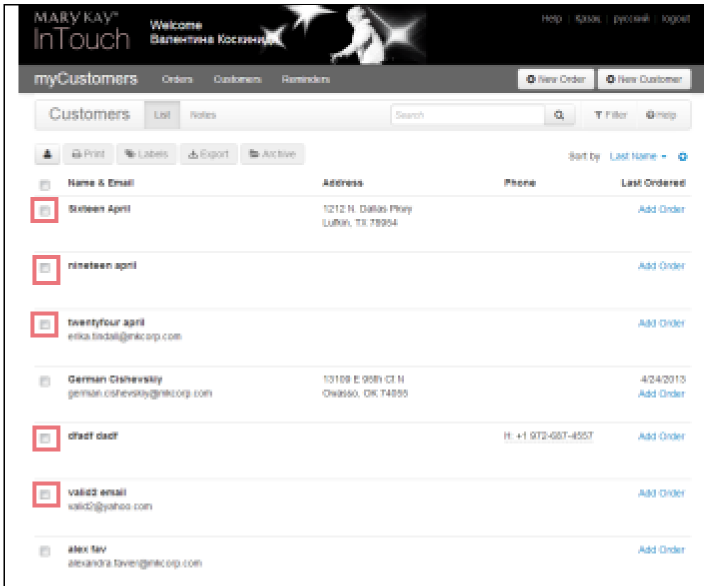
How to Export a Filtered List of Customers to an Excel Spreadsheet

	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.**
	The Birthday selection field displays. Click the **arrow** to view the drop-down menu. For this example we will select the month of March.
	A list of customers with March birthdays is displayed.

	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.

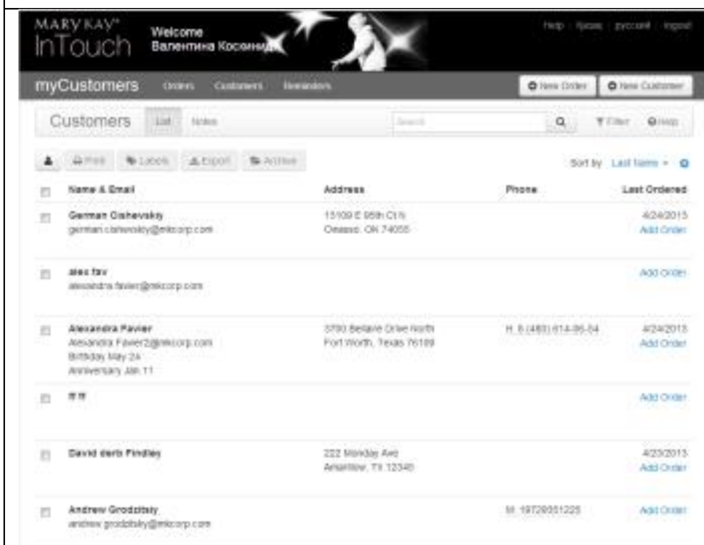
How to Select and Archive Customers

	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**. To begin, click **Customers.** The customer list is displayed.
	To select customers one by one, click the **checkbox** beside each customer. Selecting the checkbox activates the **Archive** button. To remove the customers from the **Active Customer List** and move them to the **Archived Customer List**, click **Archive.**
	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.** Click **Ok** to continue and move the customer. Click **Cancel** if you do not want to move the customer.



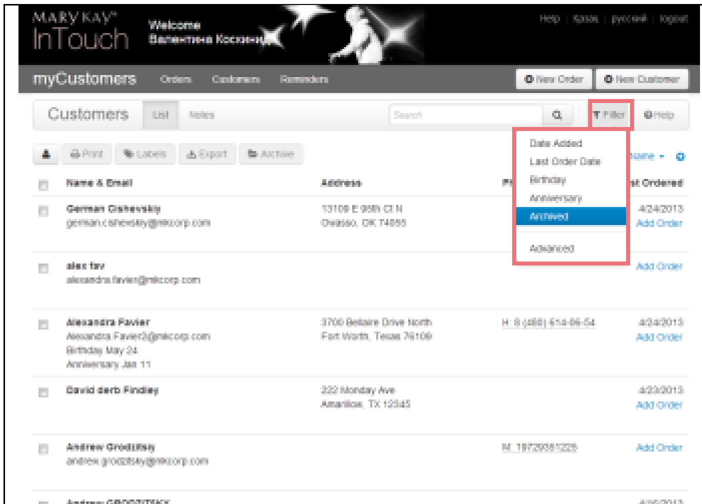
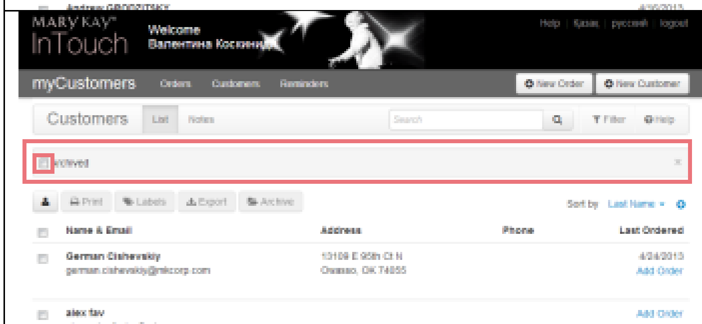
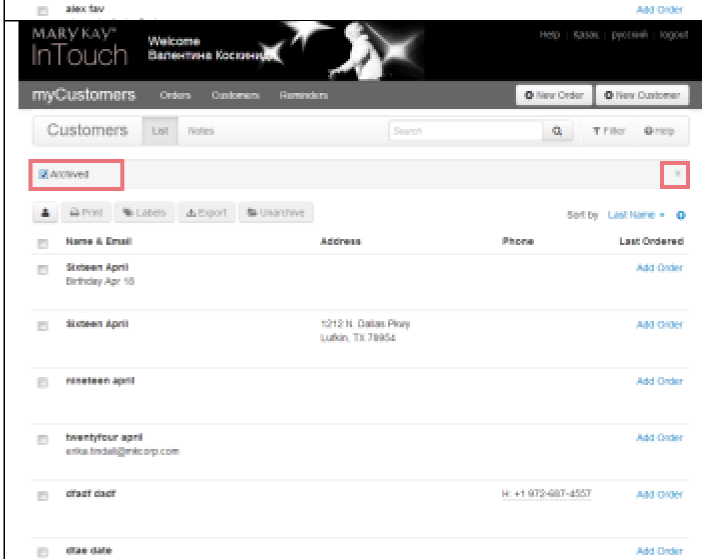
The checkmarks are cleared from the checkboxes but the names are still on the **Active Customer List**.

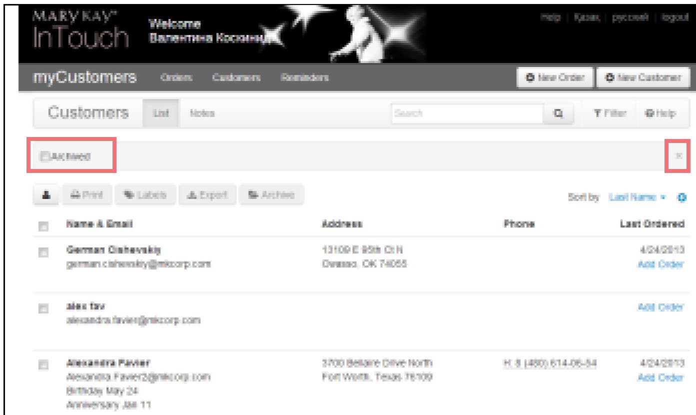
Before the changes will be visible, you will need to leave the Customer List and go to another page or click the **Refresh** icon located at the top of the browser.



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

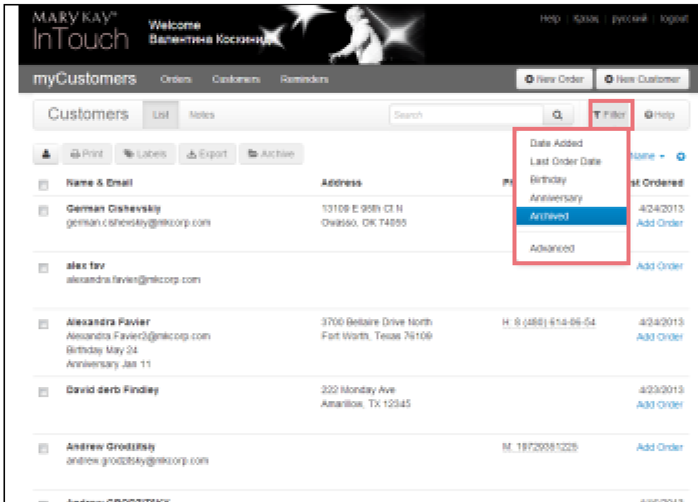
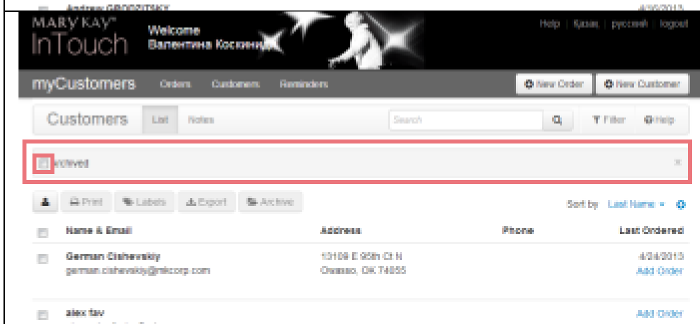
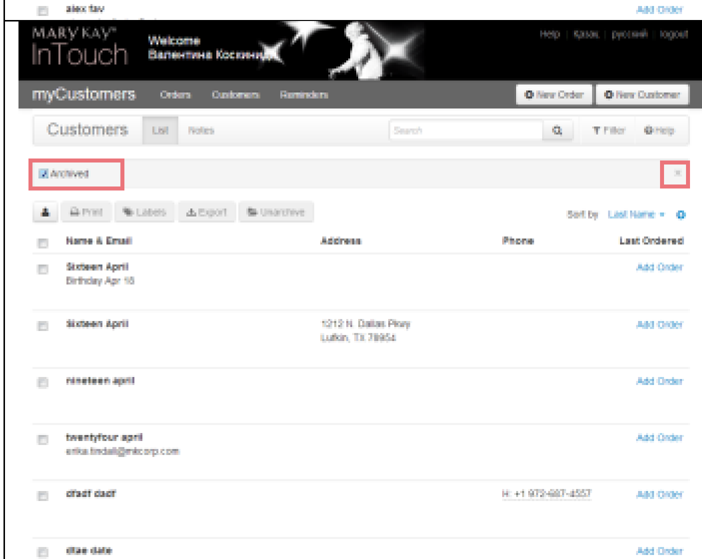
	Use the **Filter** to view your customers who are on the **Archived Customer List**. Click **Filter**. A drop-down menu displays. From the drop-down menu, select **Archived**.
	The **Archived Bar** displays. To view the **Archived Customer List**, click the checkbox beside **Archived**.
	The list immediately 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**.

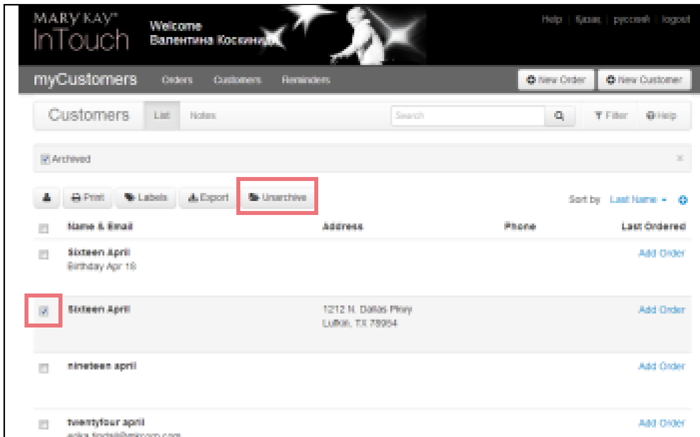
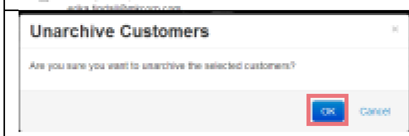
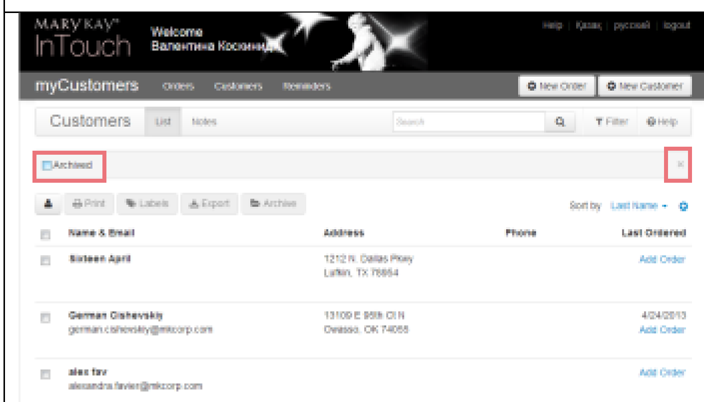


The **Active Customer List** is displayed.

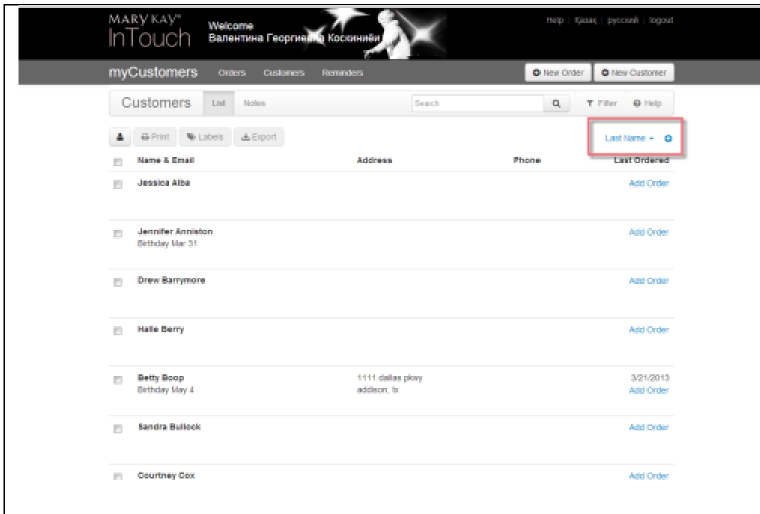
To remove the **Archived Bar**, click the **“X”.**

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

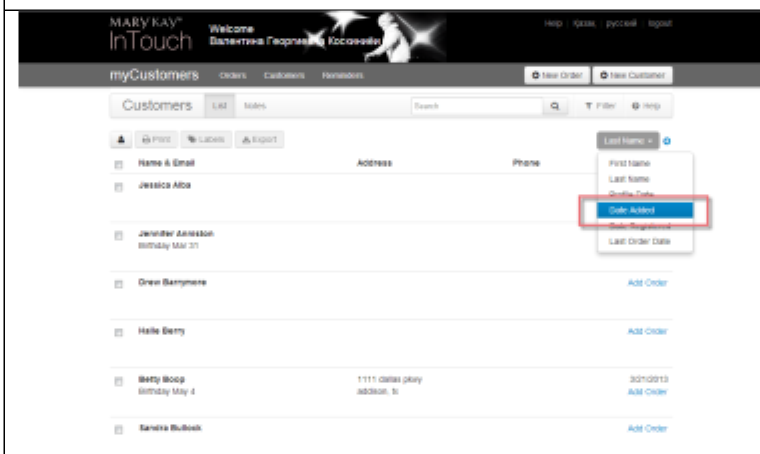
	It is easy to move a customer from the **Archived Customer List** to the **Active Customer List**. First open the Archived Customer List. To do this, click **Filter**. A drop-down menu displays. From the drop-down menu, select **Archived**.
	The **Archived Bar** displays. To view the **Archived Customer List**, click the checkbox beside **Archived**.
	The list immediately changes and displays the **Archived Customer List**.

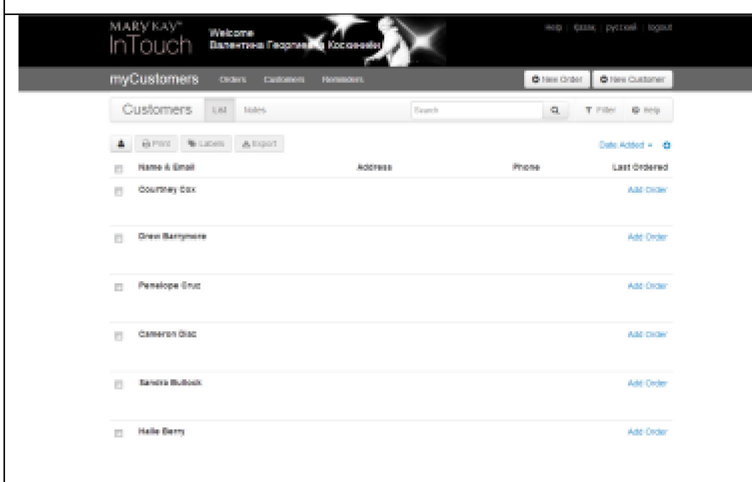
	To move a customer to the **Active Customer List**, click the **checkbox** next to the customer's name. Click **Unarchive.**
	A **Confirmation** screen displays to confirm you do want to remove the customer from the **Archived Customer List**. Click **Ok** to continue and move the customer. Click **Cancel** if you do not want to move the customer.
	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

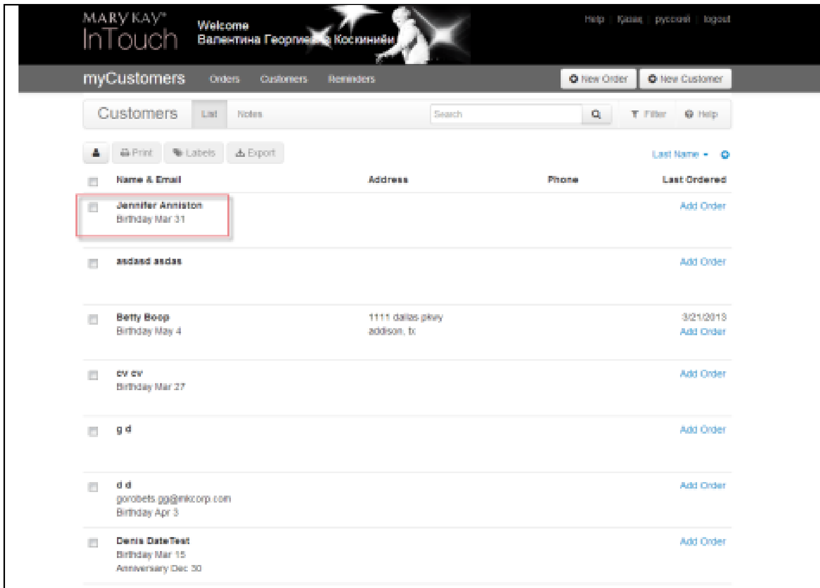
<table>
<tr>
<td>
</td>
<td>By default the customer list is sorted by the customer's last name.

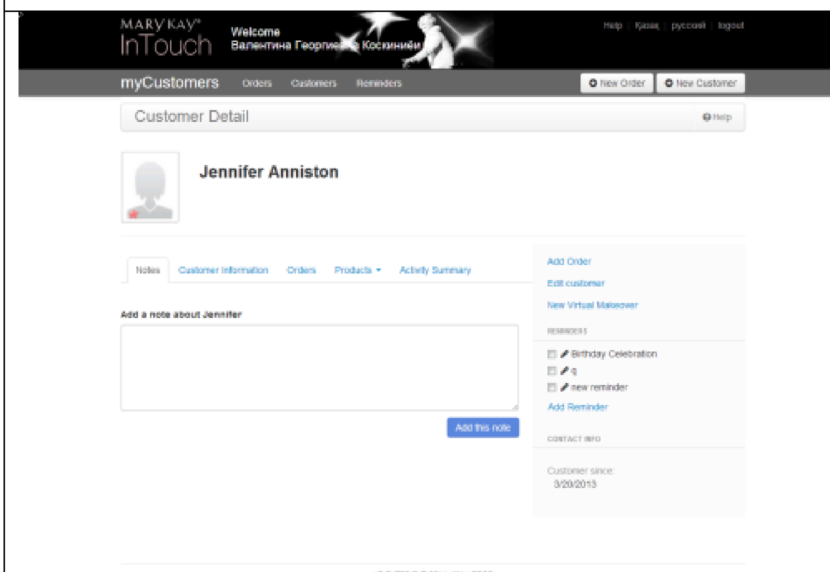
You can change it to sort by,
First Name
Profile Date
Date Added
Last Order Date

Click Last Name in the upper right-hand corner.</td>
</tr>
<tr>
<td>
</td>
<td>A drop-down menu displays.

Select the sort category. For this example, we will use Date Added.</td>
</tr>
<tr>
<td>
</td>
<td>The list is automatically sorted with the customer who was added most recently listed first.</td>
</tr>
</table>

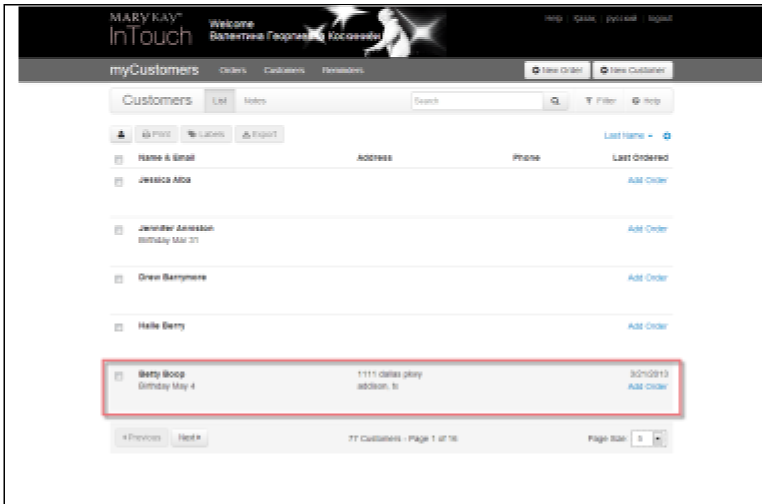
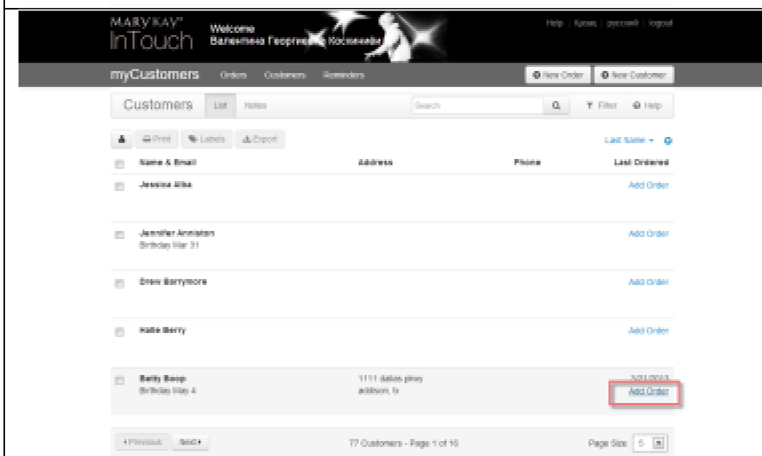
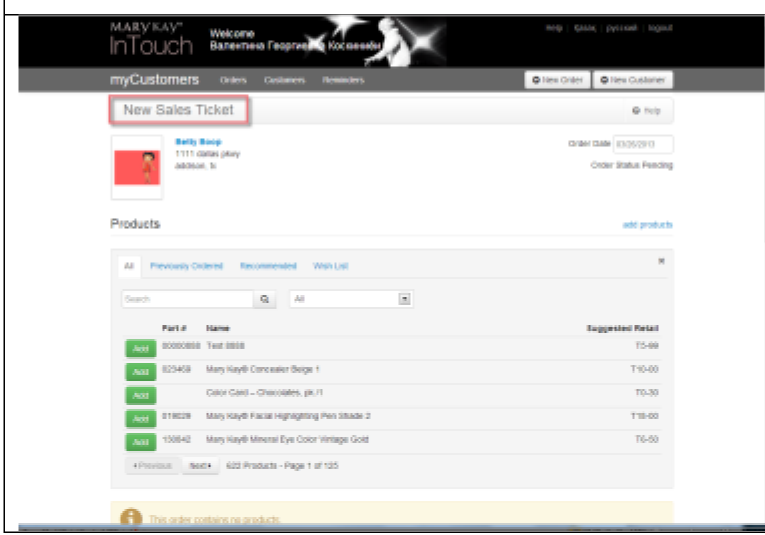
How to View a Customer’s Profile Page

<table>
<tr>
<td>


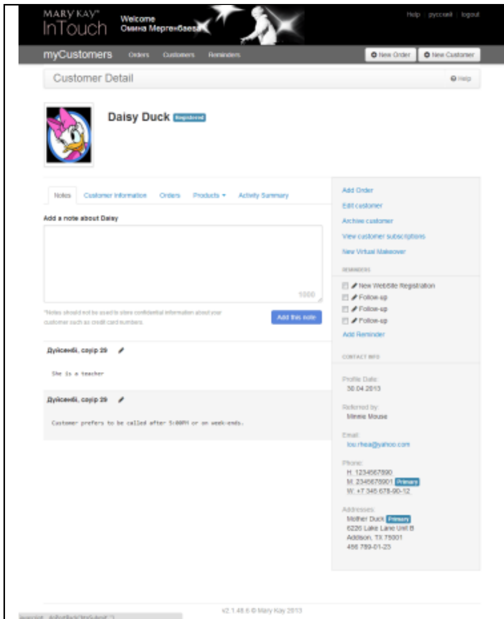
</td>
<td>From the Customer List you can open the customer’s Profile Page by clicking the line for the customer’s name.</td>
</tr>
<tr>
<td>


</td>
<td>The customer’s Profile Page displays defaulting to the Notes tab.</td>
</tr>
</table>

How to Open a Customer's Order

	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.
	Click **Add Order**
	The **New Sales Ticket** page is displayed. You are ready to start entering her order.

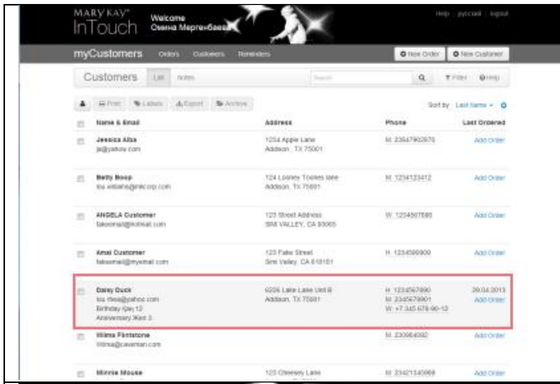
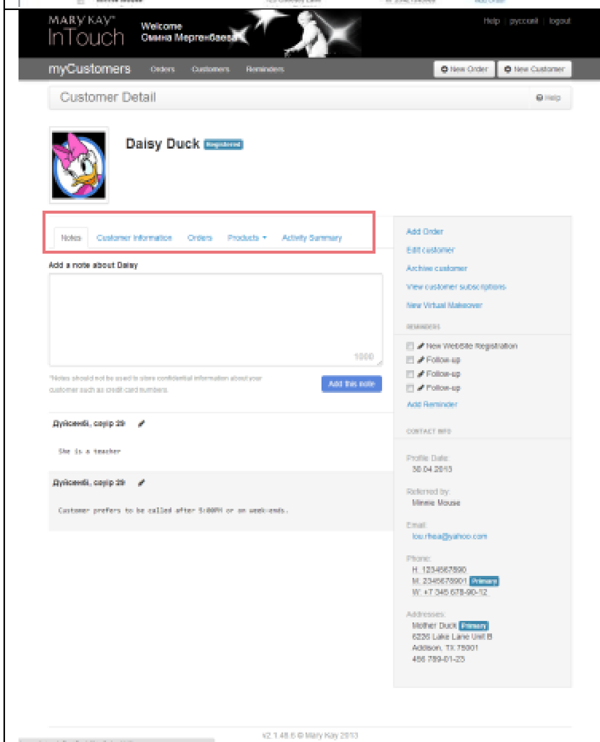
Customer Profile Page



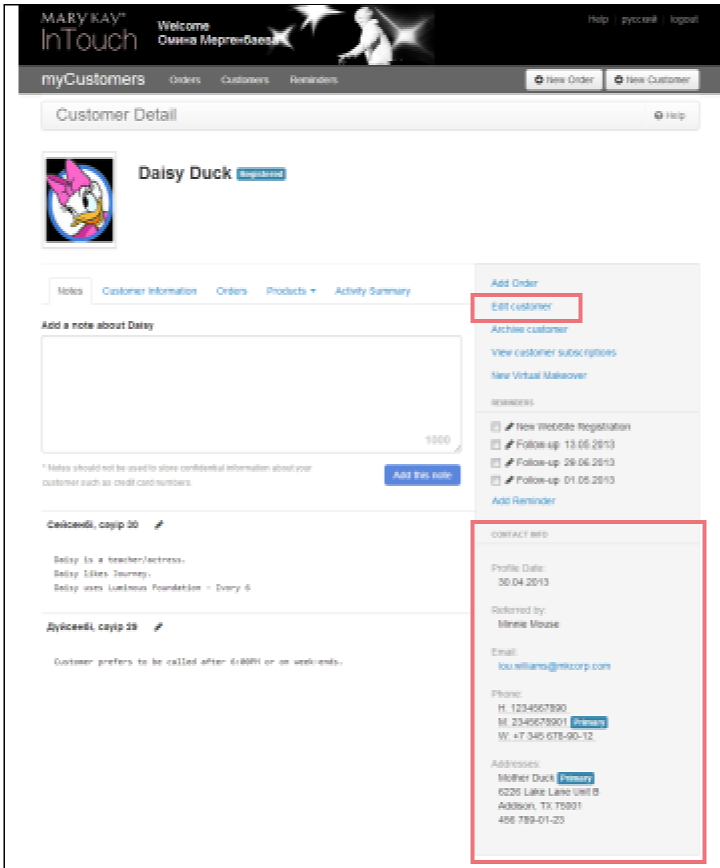
The customer's **Profile Page** is where you can,

- 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

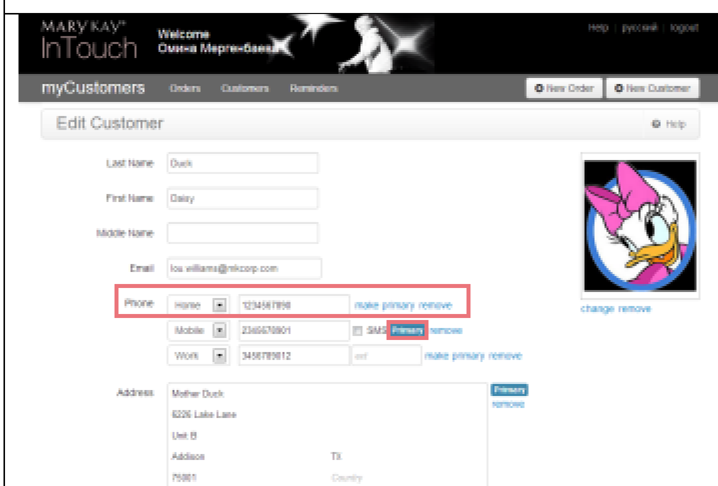
How to View the Customer’s Profile Page

	To open the customer’s **Profile Page**, click **Customers**. Click the line of a customer on the **Customer List**. *Tip!* You can click anywhere on the line to open the customer’s **Profile Page**.
	The customer’s Profile Page opens. **“Registered”** will appear by the customer’s name if she has registered on your Personal Website. 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. **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**. **Orders –** A list of her online orders or orders created using myCustomers that you can open and view. **Products** – There are 3 sections, • **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



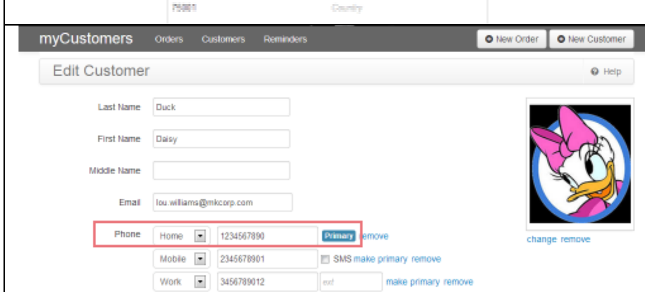
To make address, phone, email or other changes to the customer's personal information on the **Profile Page**, click the **Edit Customer** link.



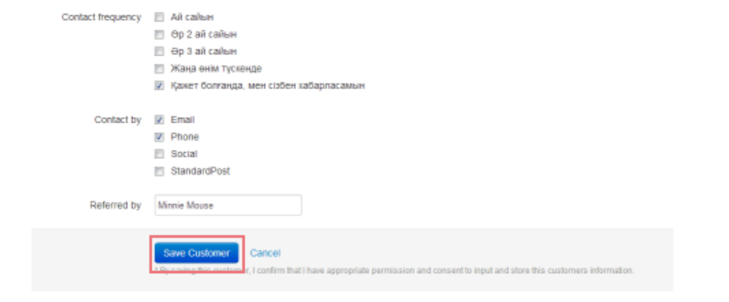
The **Edit Customer** page displayed.

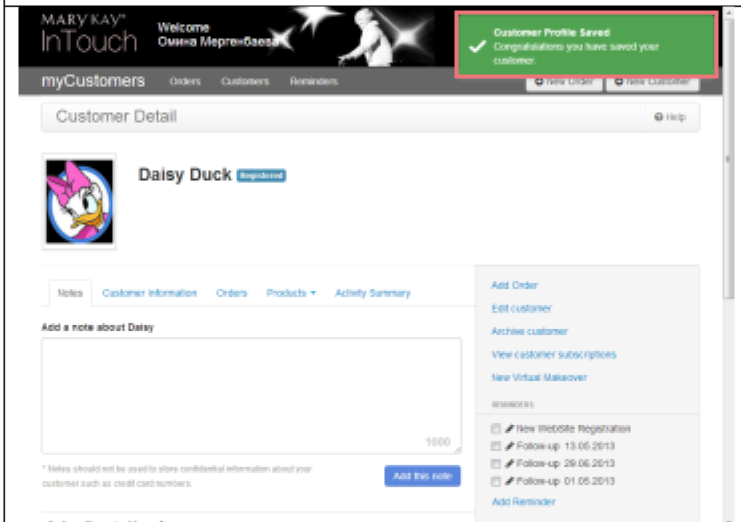
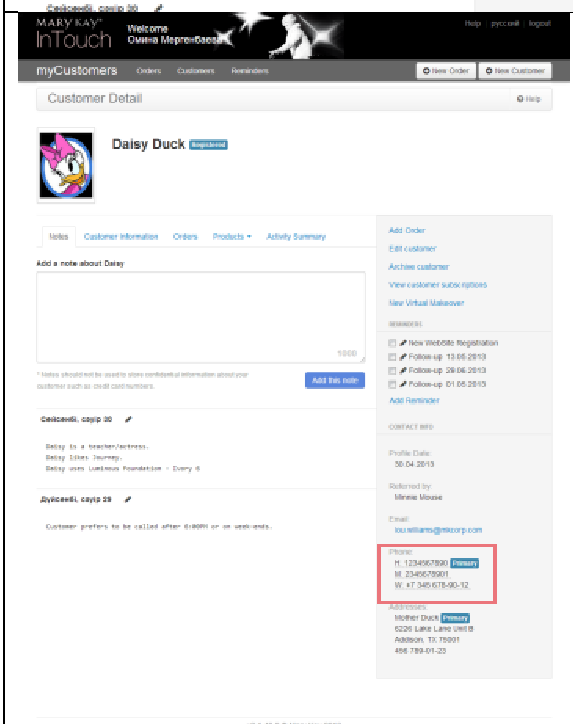
For this example, we will change the primary phone number from the second phone number to the first number listed.

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.

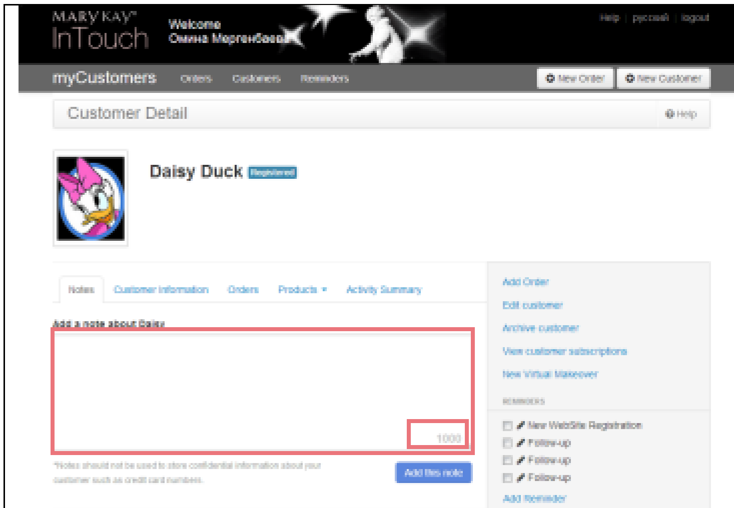
<table>
<tr>
<td>
</td>
<td>To save the changes, scroll down to the bottom of the screen and click the Save Changes button.

To return to the Profile Page and not save the changes, click Cancel.</td>
</tr>
<tr>
<td>
</td>
<td>A Confirmation screen displays to confirm the change was successful.</td>
</tr>
<tr>
<td>
</td>
<td>To view the changes, look in the Contact Information section.

For this example we changed the number marked as “primary” from the mobile number to the home number.

The Home number is designated as the Primary phone number.</td>
</tr>
</table>

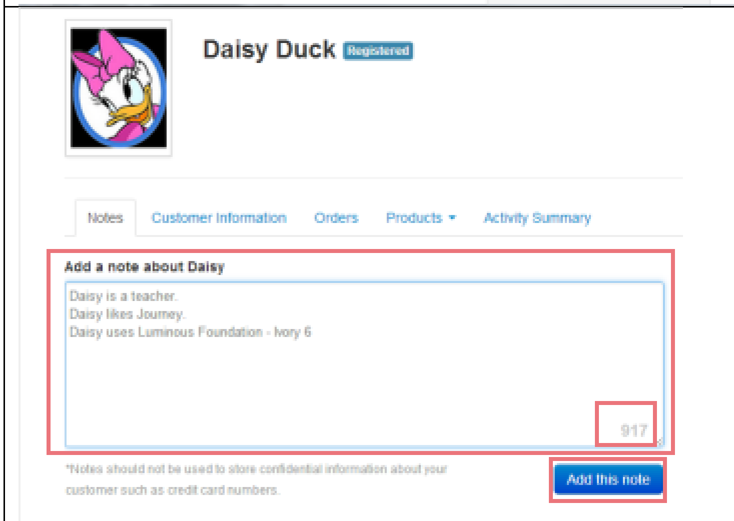
Add Customer Notes



Adding a note concerning your customer is quick and easy.

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

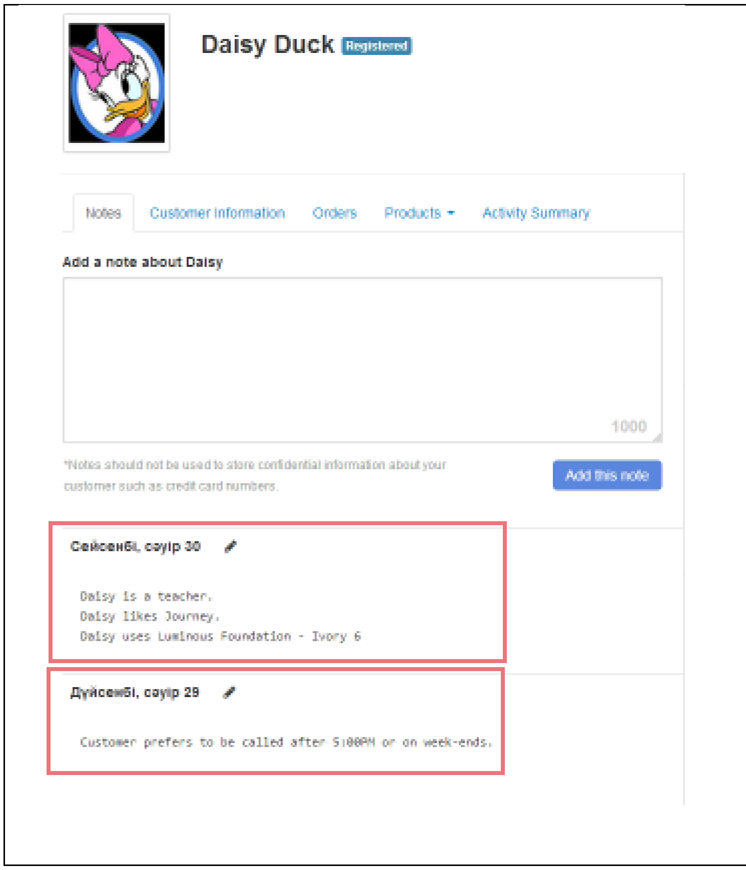
The **number** in the right-hand corner tells you how many characters can be typed in this field. The number decreases as characters are entered so you always know exactly how much text you can still enter.



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.

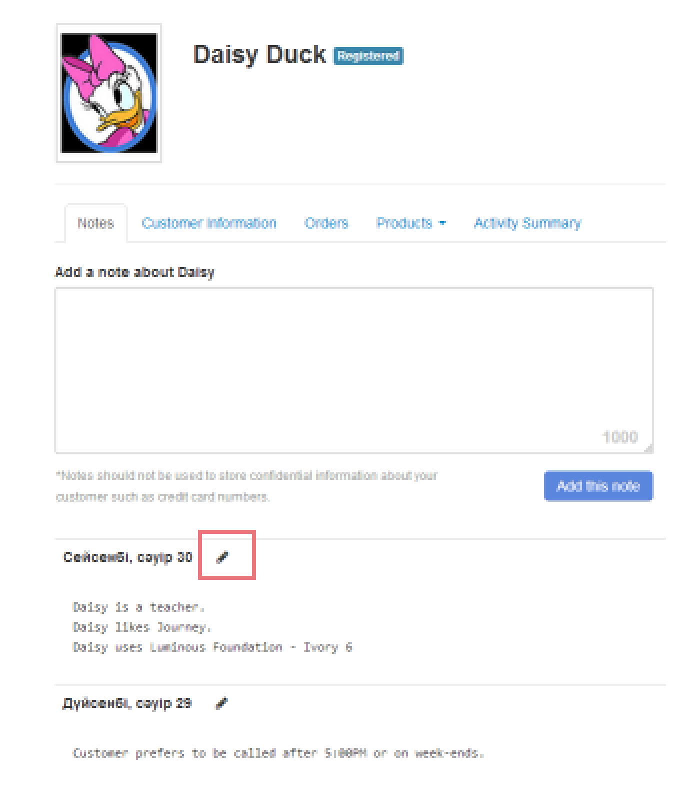
When you are finished, click **Add This Note.**



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

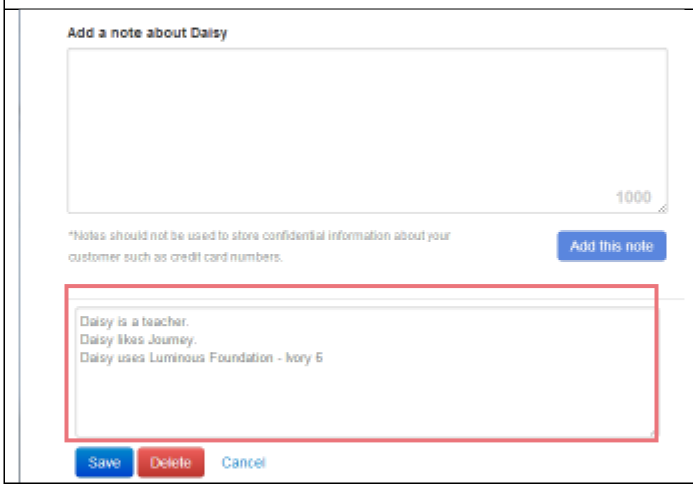
NOTE: The second note was automatically generated by the system when she was added as a customer. **Contact Preferences** are completed on the **MyMK** section of the Personal Website or on the **Add a Customer** screen in myCustomers and a note is automatically generated.

How to Edit Customer Notes

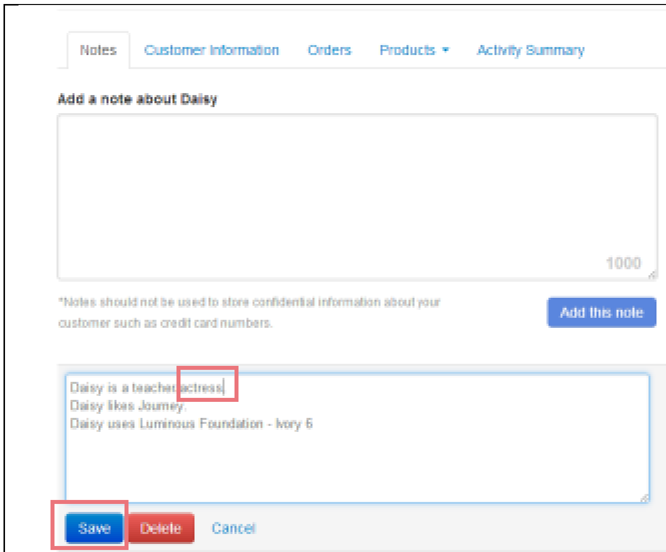


Notes created by you or notes generated by the system can be easily edited on the Profile Page.

To make changes to a notes,
click the **Pencil** icon located beside the date the note was created.



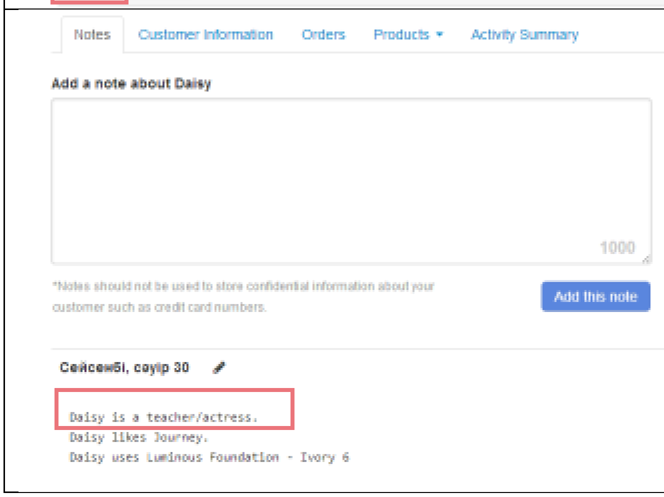
An editable **Note** field displays the current note.



Make the changes to the note.

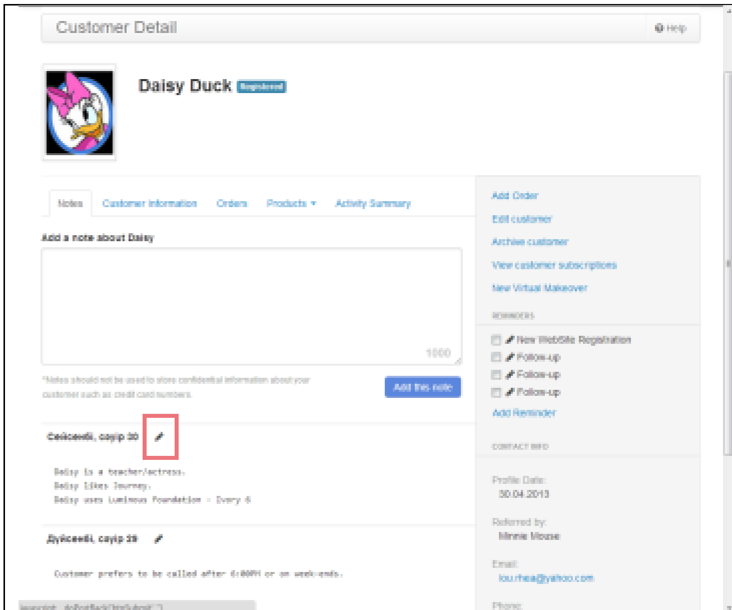
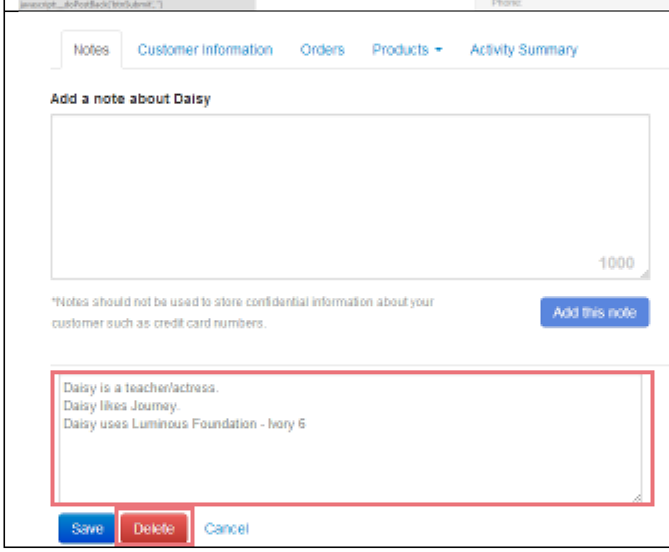
Click **Save** to save the changes.

To leave it as is and not make any changes, click **Cancel**.

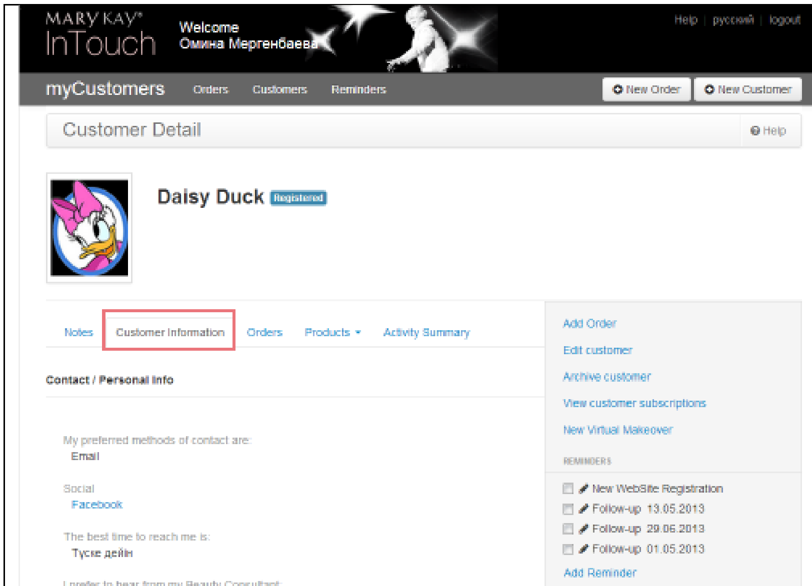


The note displays with the changes.

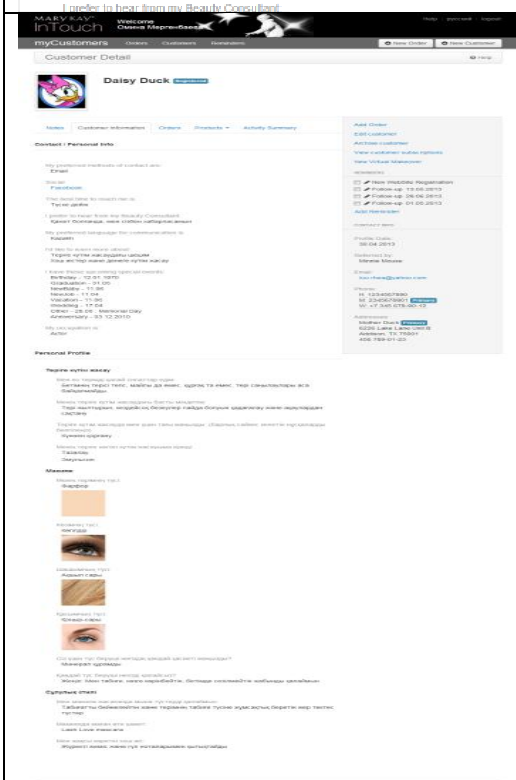
How to Delete Customer Notes

	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

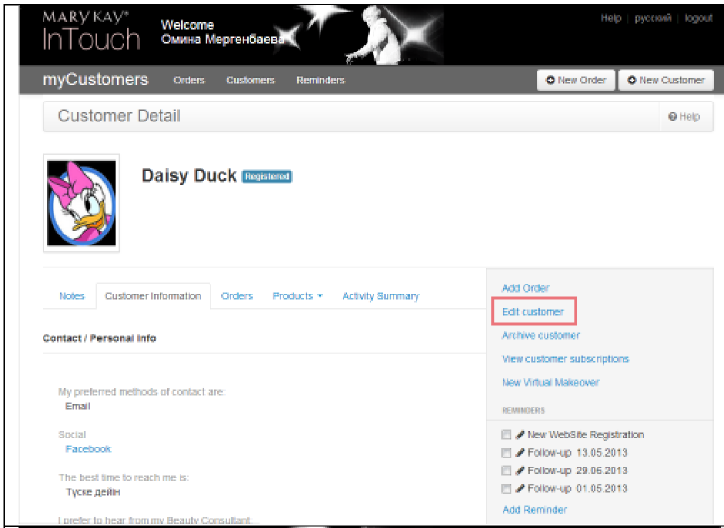
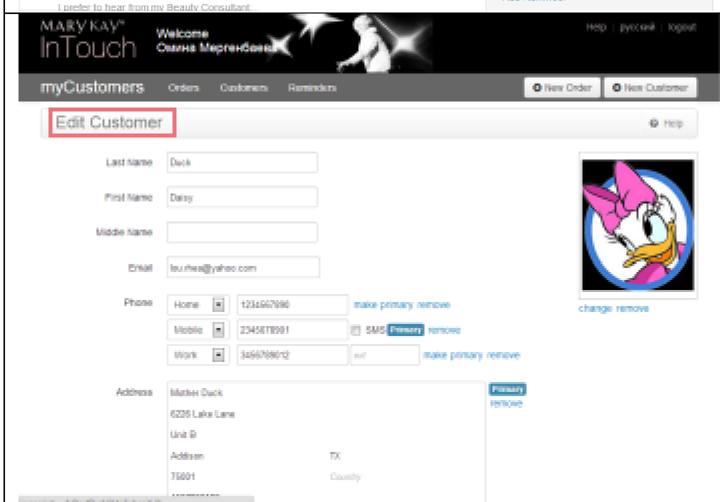
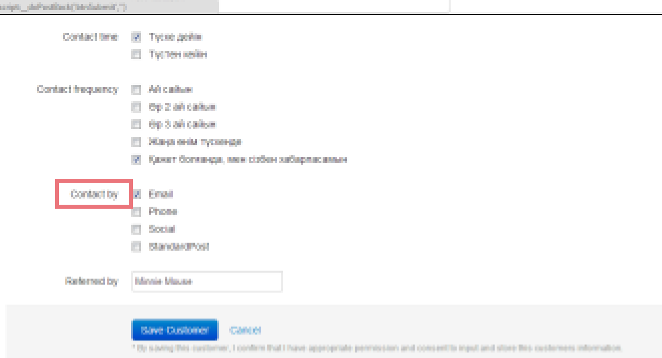


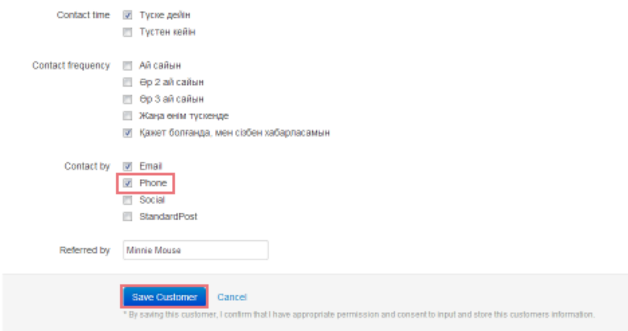
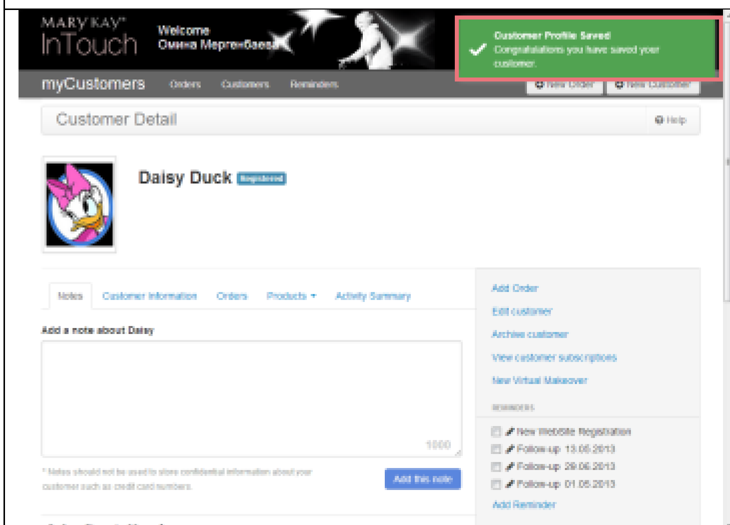
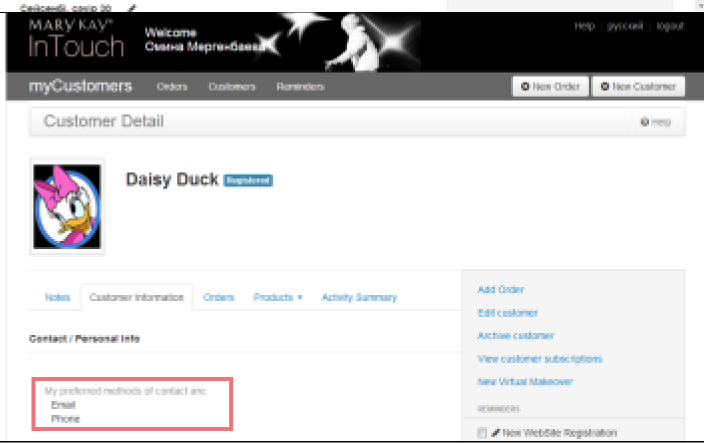
To view a customer's **Contact Preferences** and **Profile**, click the **Customer Information** tab.



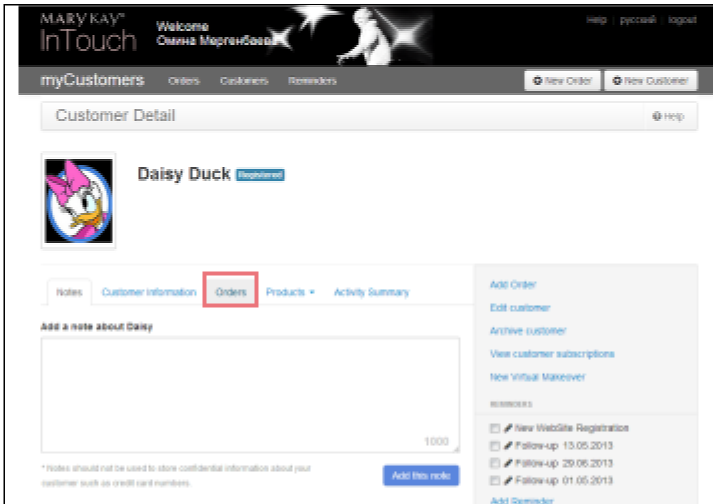
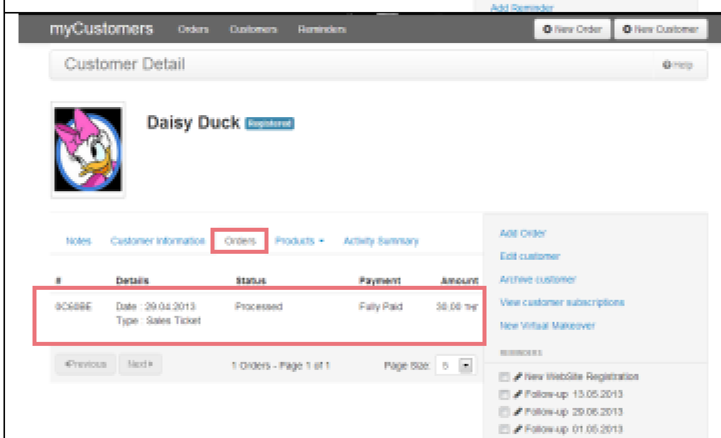
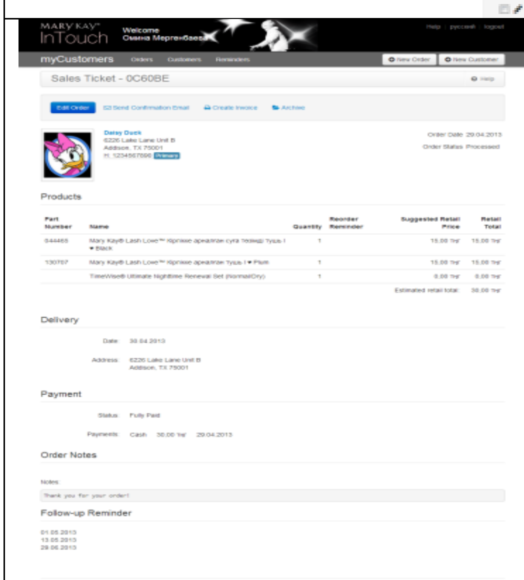
The information in this section is from the **Add a Customer** page or from the customer's MyMK page on the Personal WebSite.

How to Edit the Information on the Customer Information Tab

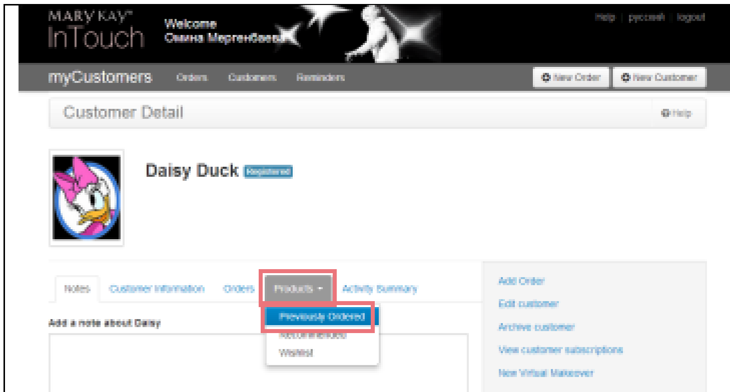
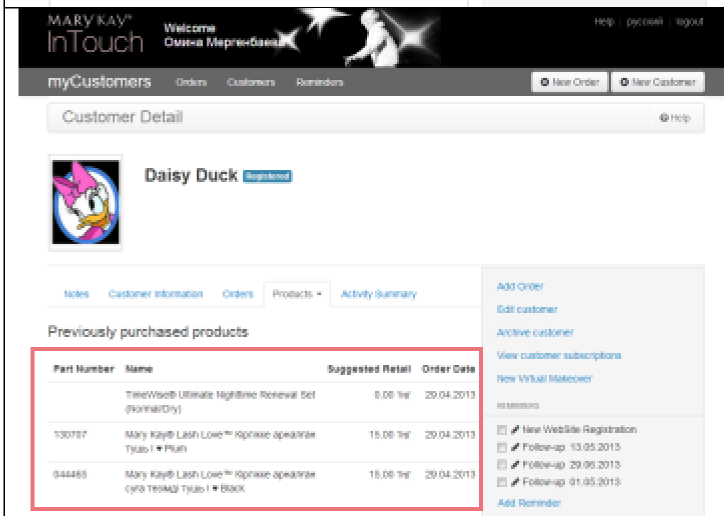
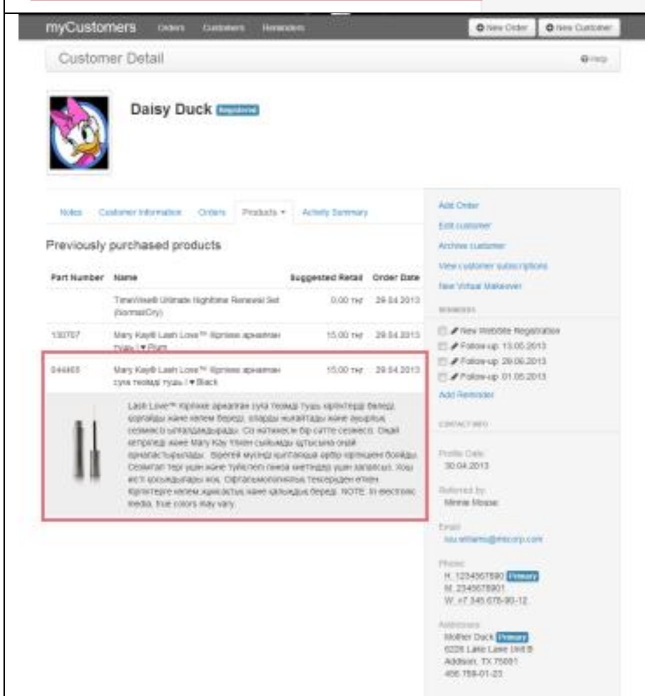
<table>
<tr>
<td>
</td>
<td>If something on the Customer Information tab needs to be changed, click the Edit Customer link on the right side of the Profile Page.</td>
</tr>
<tr>
<td>
</td>
<td>The Edit Customer screen displays.</td>
</tr>
<tr>
<td>
</td>
<td>Locate the field or selection that needs to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

	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**.
	A **Confirmation Screen** displays confirming the change was successful.
	To view the change, click the **Customer Information** tab and locate the change.

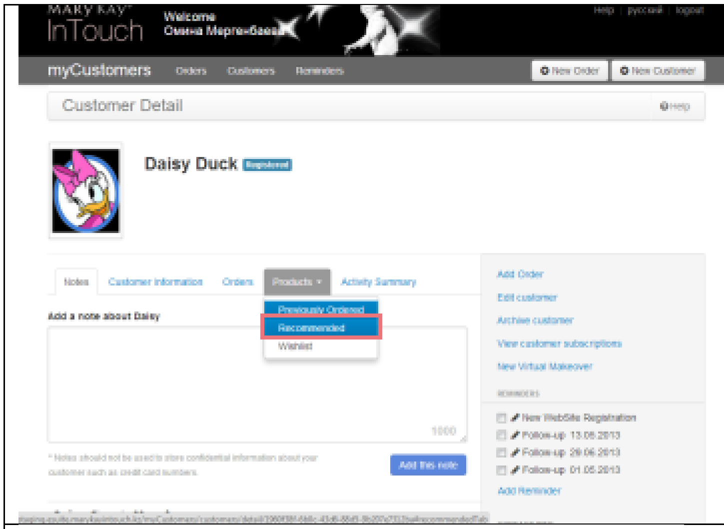
How to View and Open a Customer's Orders from the Profile Page

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

How to View the Products a Customer Has Previously Ordered

	To view the products a customer has ordered, click the **Products** tab. A drop-down menu displays. Select **Previously Ordered** from the drop-down menu.
	A list of the products the customer has ordered is displayed. Note: Only products ordered online or orders processed using myCustomers for the previous 2 years are displayed.
	Click the product to see a description of the product.

How to View a Customer’s Recommended Products

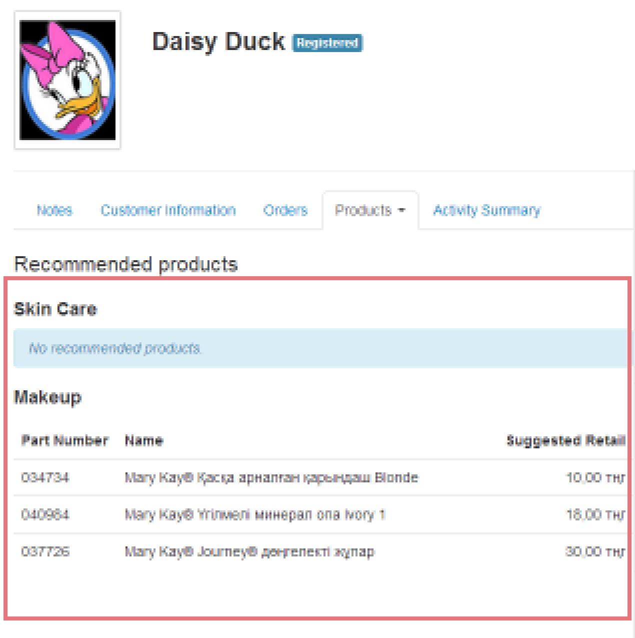


To view the products recommended for a customer, click the **Products** tab.

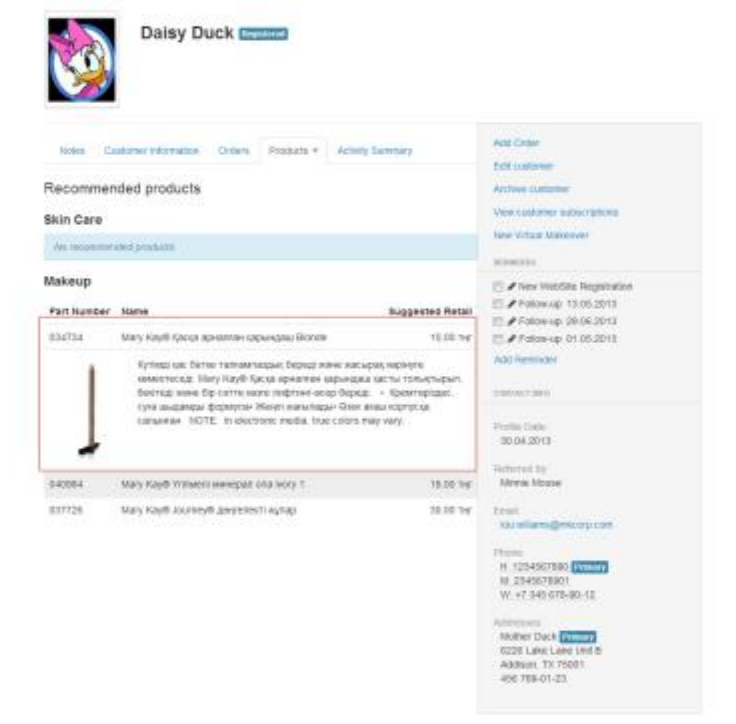
A drop-down displays.

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

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

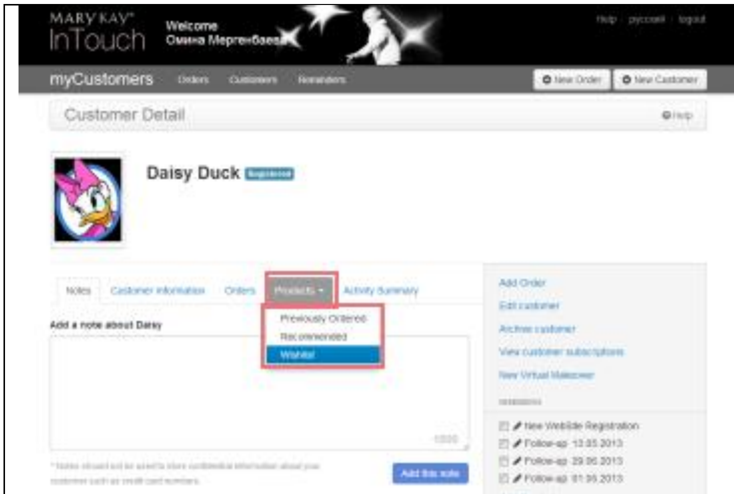


The **Recommended Products** screen displays with a list of recommended products displayed by category.



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

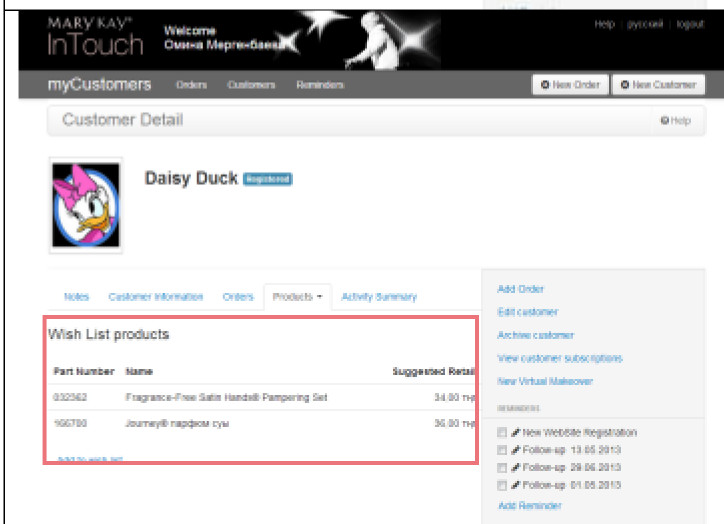
How to View the Customer's Wishlist



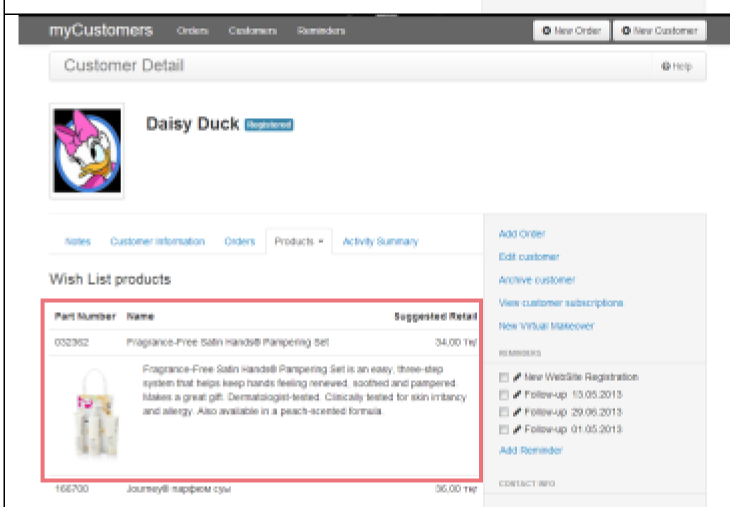
To view a customer's **Wishlist**, click the Products tab.

A drop-down menu displays.

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

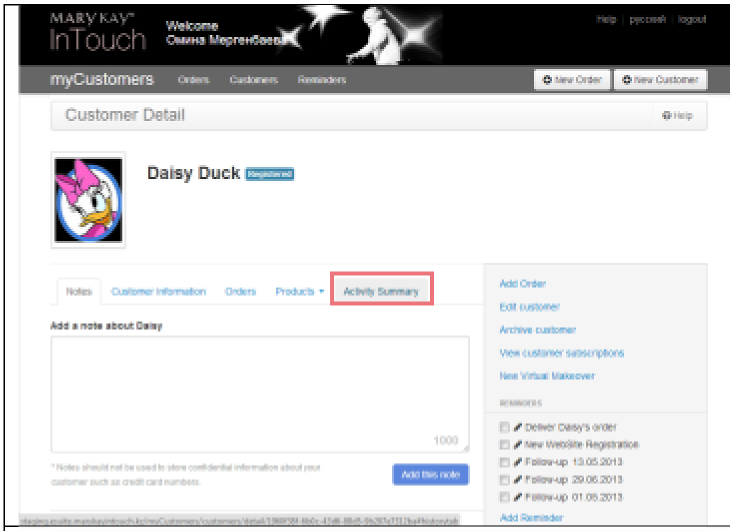


Products the customer has on her **Wishlist** are displayed.

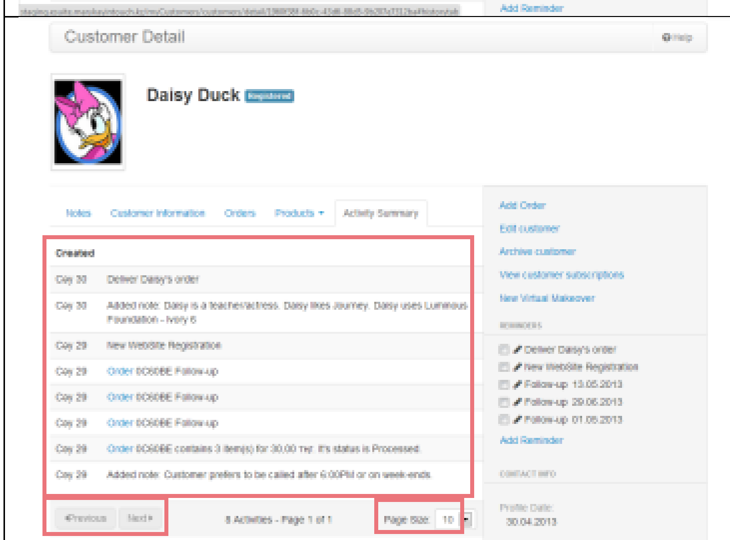


To view the details of a product, click the product and the product details are displayed.

View All of Your Interactions with a Customer



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

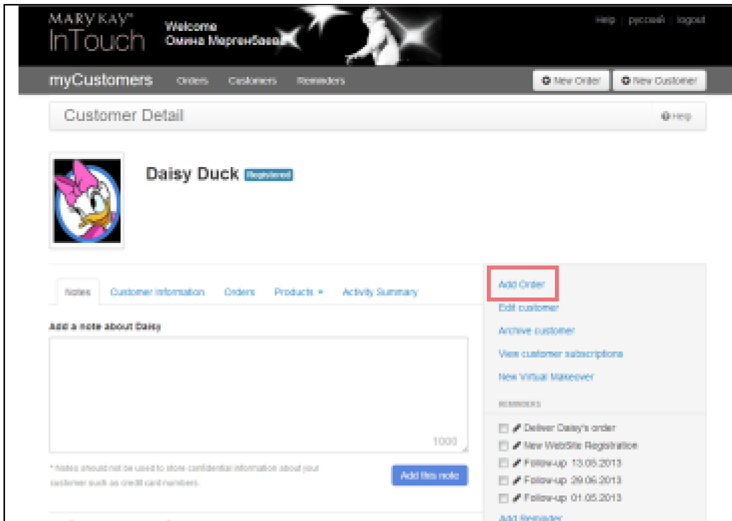


All interactions with the customer are displayed along with the date they were created.

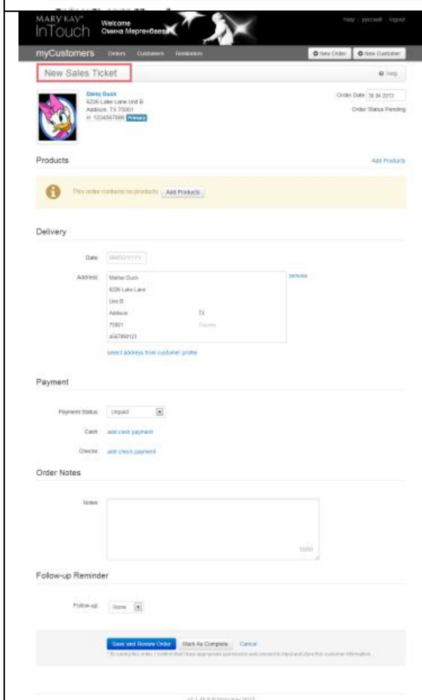
To view additional pages or return to the previous page, use the **Previous** and **Next** buttons.

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



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.

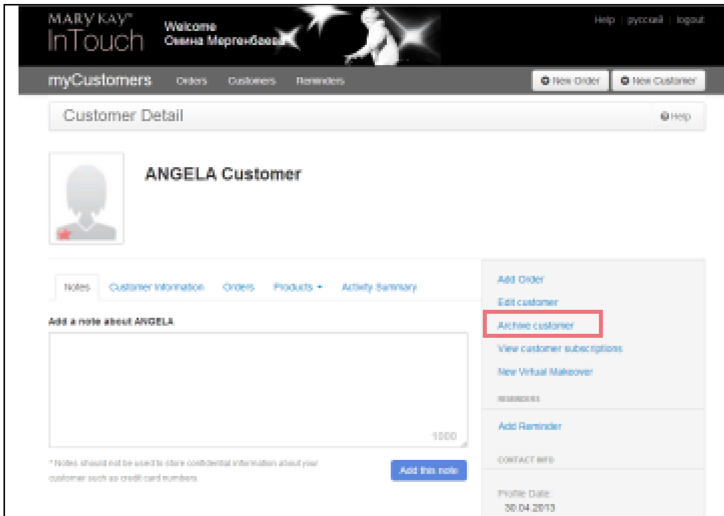
Once an order is marked complete the pending status changes to **Processed**. The **Processed** status means that the order is complete but not shipped or delivered.

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.

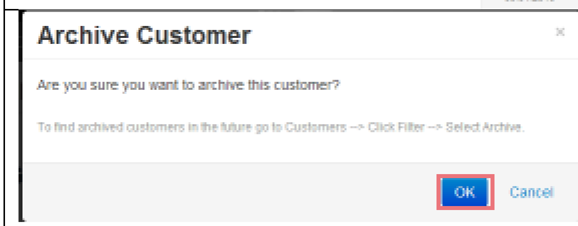
For additional instruction on how to create an order, see the module, **How to Create a New Order**.

How to Archive or Unarchive a Customer from the Profile Page



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.

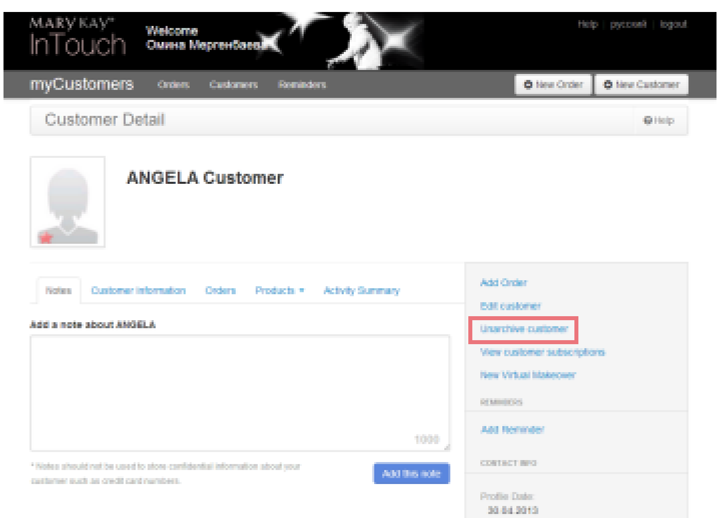
To add a customer to the archive list from the Profile Page, click the **Archive Customer** list.



A **Confirmation** screen displays to confirm you do want to archive this customer.

Click **OK** to continue and add her to the **Archived Customer List**.

Click **Cancel** if you do not want to add the customer to the **Archived Customer List**.

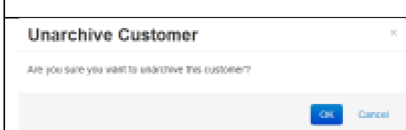


You are returned to customer's **Profile Page**.

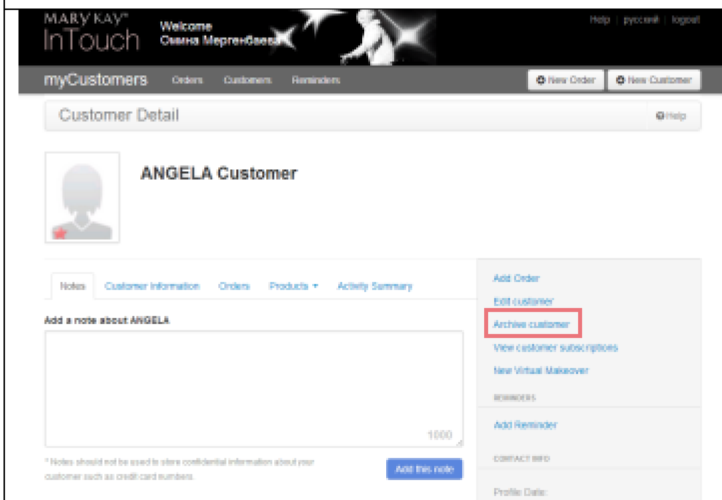
To confirm the customer has been archived, click the browser's **Refresh** icon.

The **Archive Customer** link changes to **Unarchive Customer**.

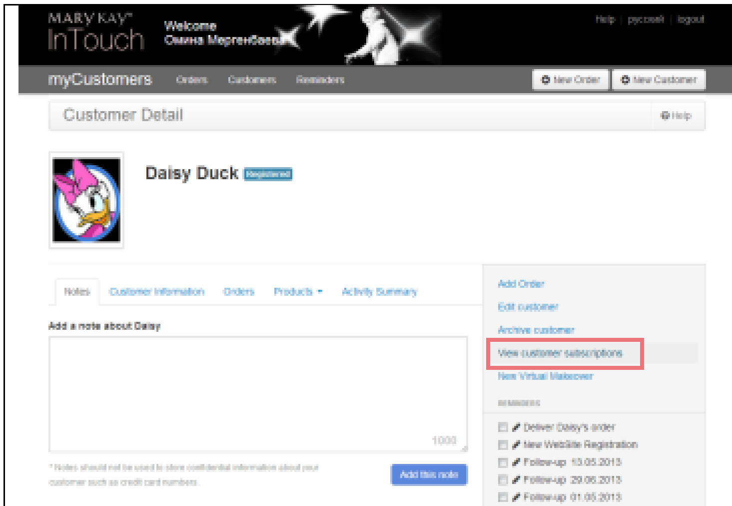
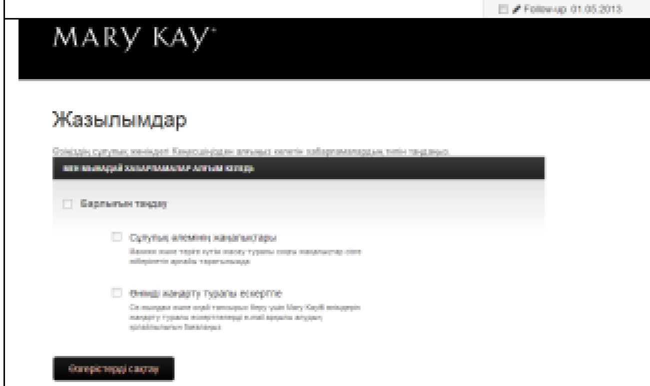
To remove a customer from the **Archived Customer List**, click the **Unarchive Customer** link.



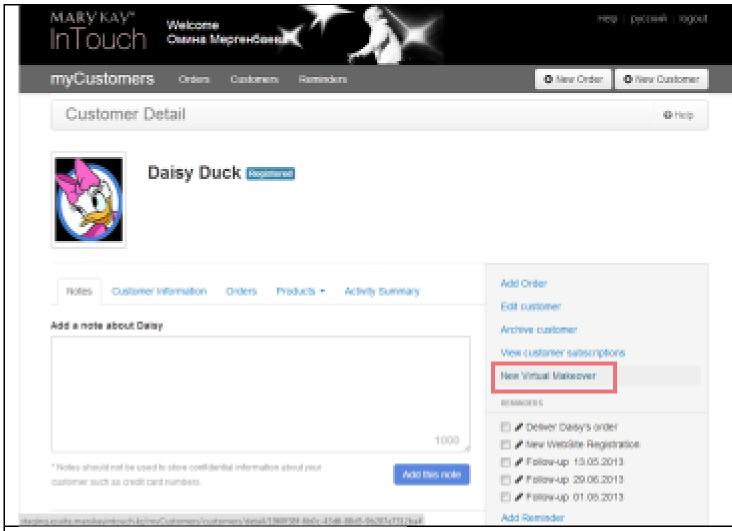
A **Confirmation** screen displays to confirm you do want to remove this customer

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

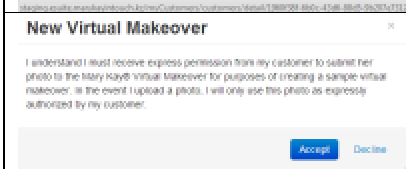
How to View a Customer’s Subscriptions

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

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



To upload your customer's picture to the Virtual Makeover, click the **New Virtual Makeover** link.

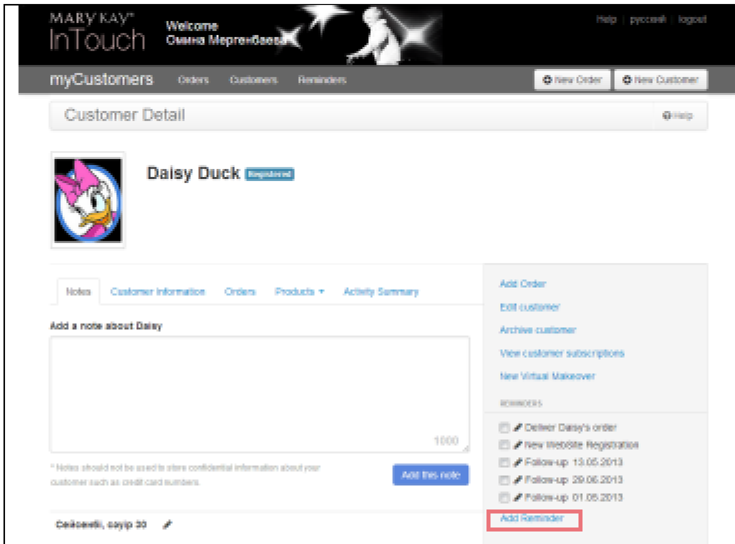


A confirmation screen displays to confirm you have the customer's permission to upload the customer's picture to the Virtual Makeover.

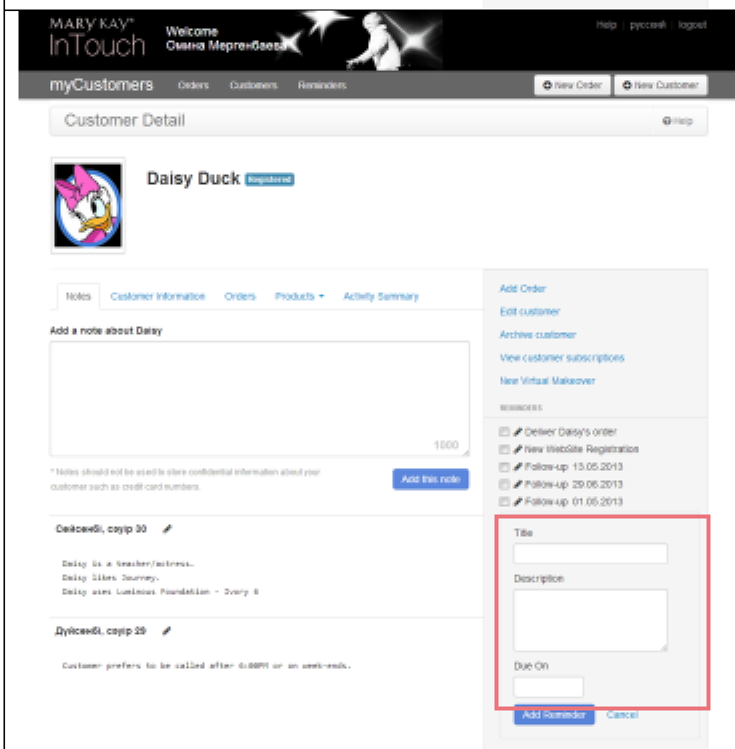
If you have her permission, click **Accept** and continue to open the Virtual Makeover.

If you do not have her permission, click **Decline**. You will not be able to upload her picture to the Virtual Makeover site.

How to Create a Reminder for a Customer



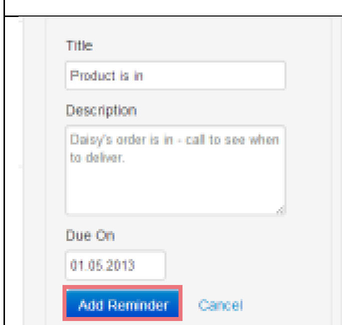
To create a reminder for a customer when you are on the Profile Page, click the **Add Reminder** link.



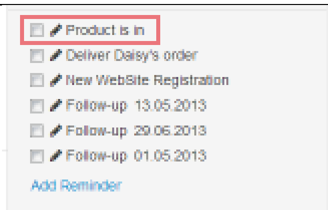
The section expands.

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

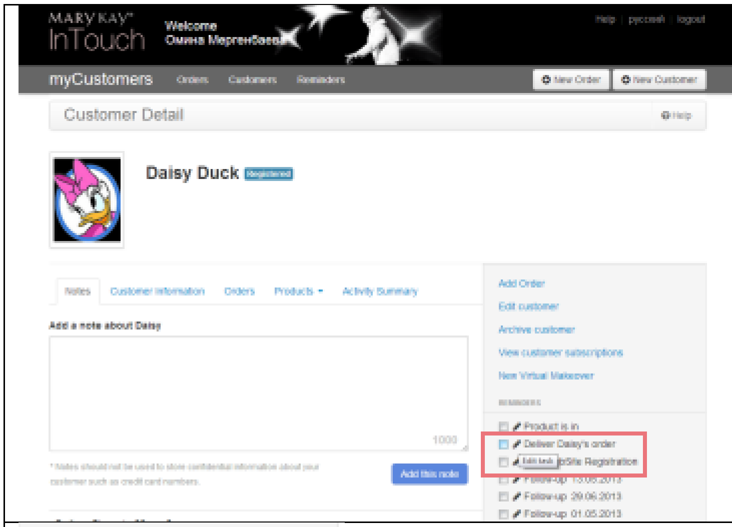
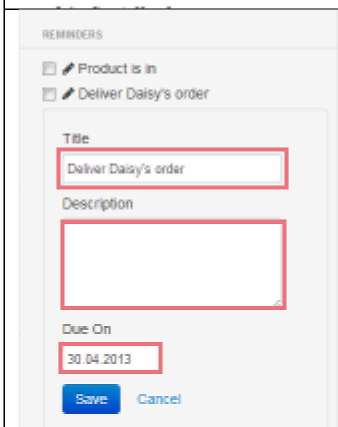
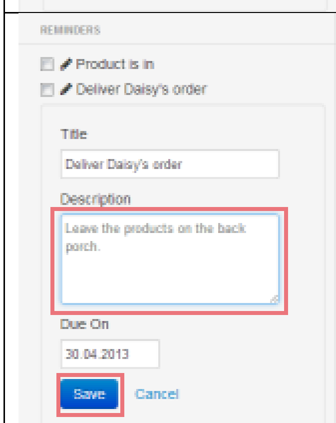
Click inside each field and enter the information for the reminder.

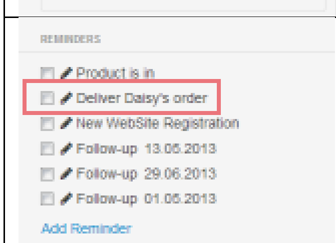


Click **Add Reminder** to add the customer's reminder.

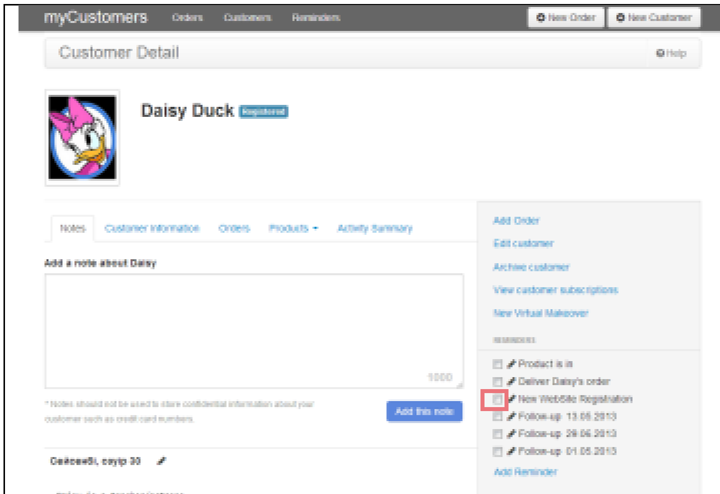
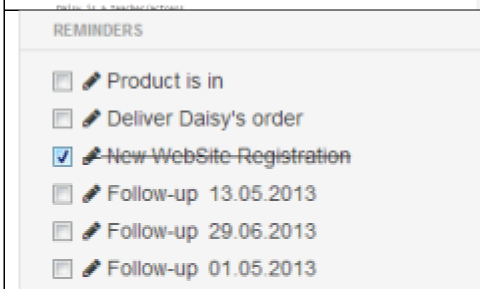
	The reminder is added to the **Reminder List**. Note: Reminders for all customers are displayed in the Reminders section of myCustomers.

How to Edit a Reminder for a Customer

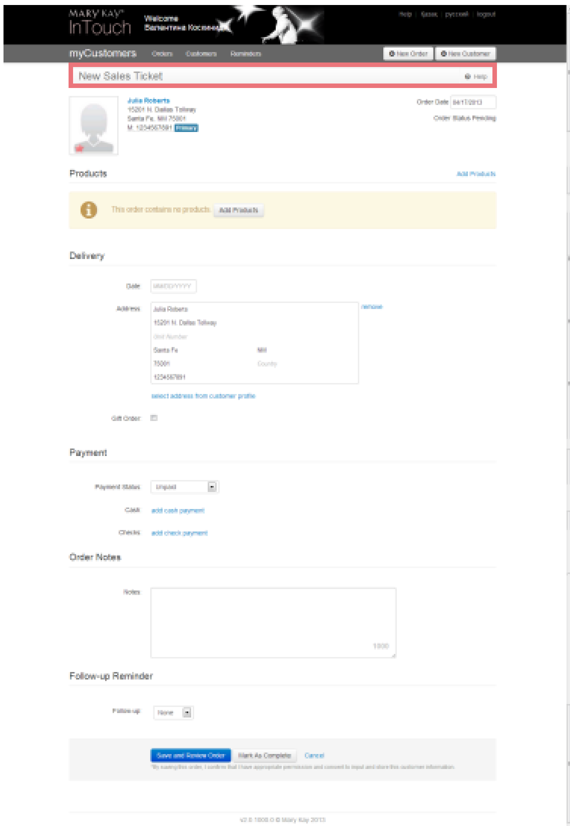
<table>
<tr>
<td>
</td>
<td>To make changes to a reminder, click the Pencil icon.</td>
</tr>
<tr>
<td>
</td>
<td>The Title, Description, and Due On fields for the selected reminder open.</td>
</tr>
<tr>
<td>
</td>
<td>Make the necessary changes to the reminder.

Click the Save button to save the changes.</td>
</tr>
<tr>
<td>
</td>
<td>The reminder is updated and added back to the Reminder List.</td>
</tr>
</table>

How to Delete a Customer Reminder

	To delete a reminder, click the checkbox beside the reminder you with to remove.
	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.

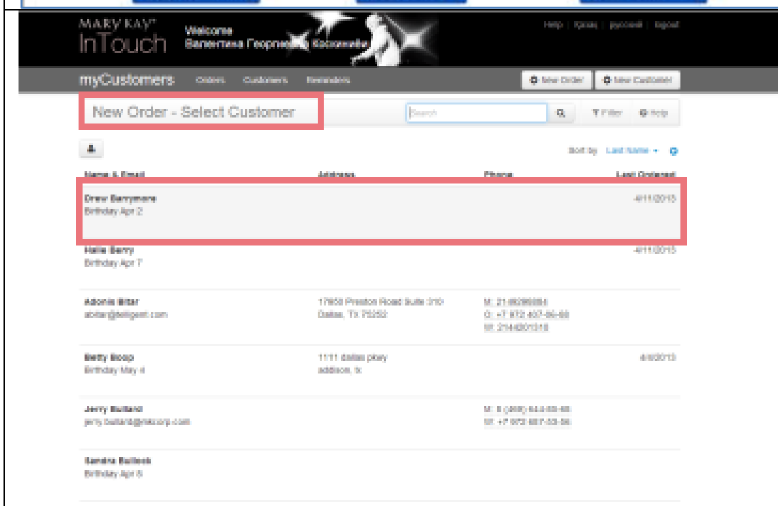
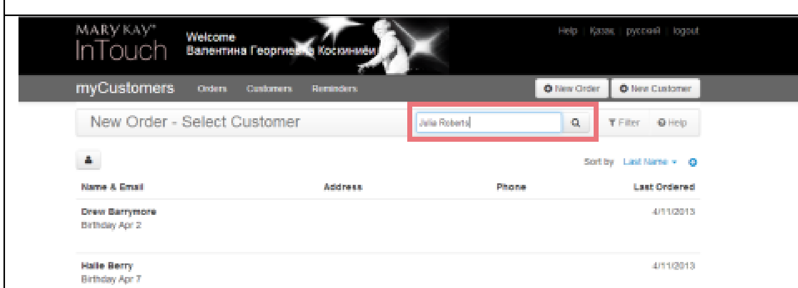
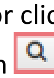
Create a New Order

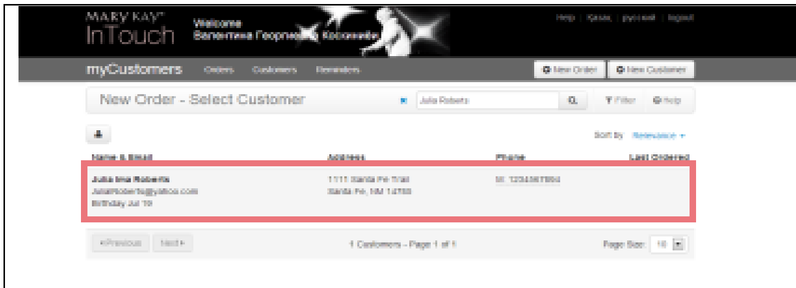


Creating a customer's order has never been easier. In this module you can see how to,

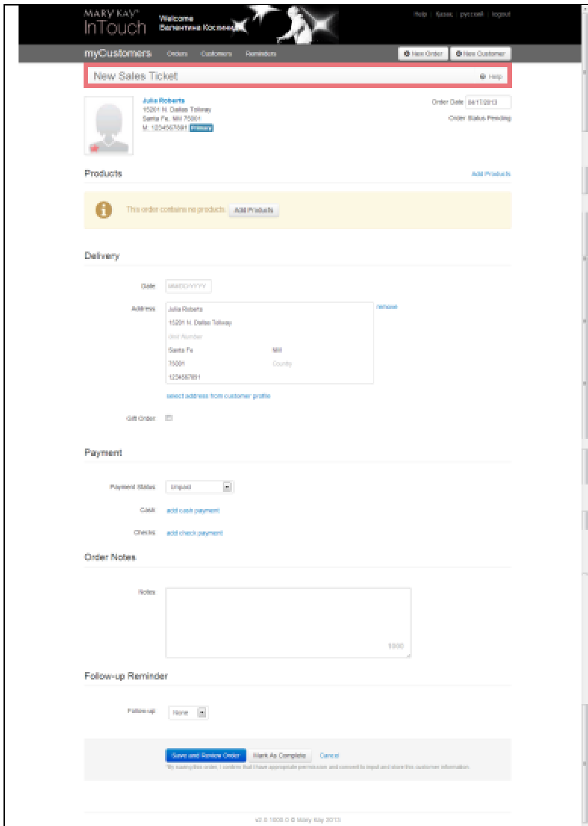
- Getting started
- Create the new order
- Add products to the order
- Removing products
- Reorder Reminders
- Adding a delivery address
- Add a gift note
- Payment
    - Cash payment
    - Payment by check
- Add order notes
- Add a follow-up
- Save, Complete or Cancel an order
- Review the order
- Editing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

How to Create a New Order – Getting Started

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

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

Create the New Order



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.

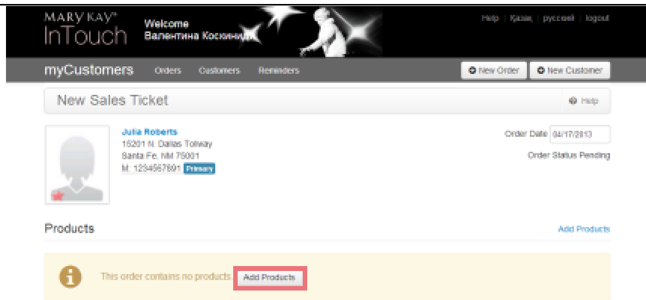
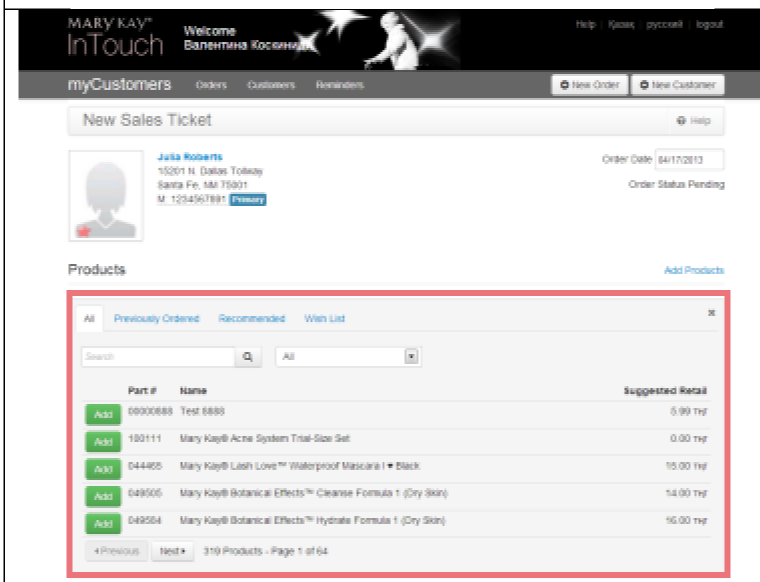
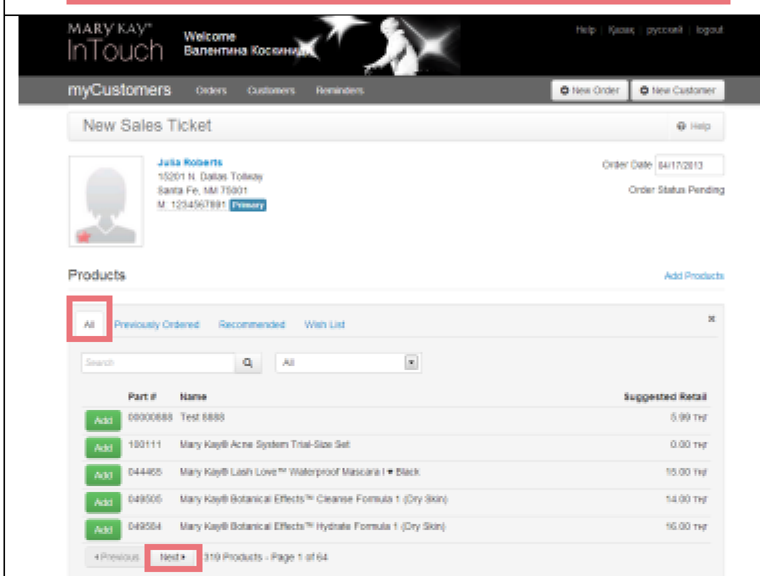
Until the order is marked complete, it remains in a **Pending** status. The **Pending** status means that the order is not complete.

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**.

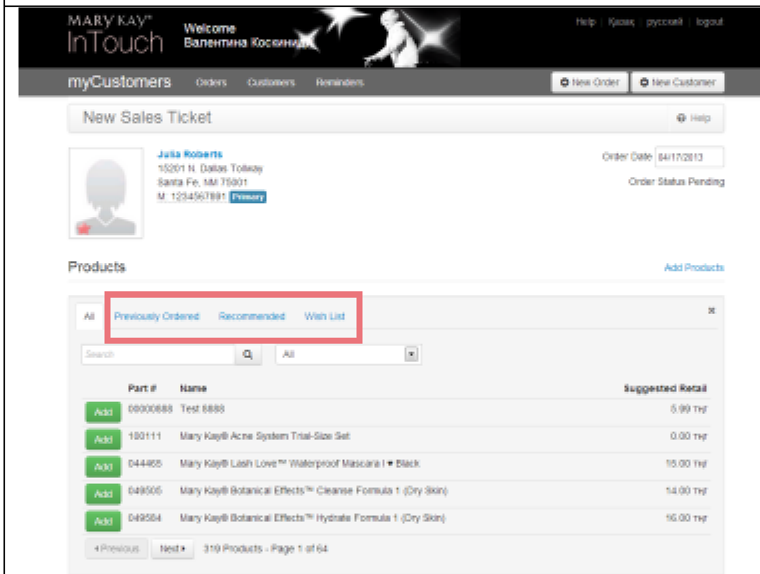
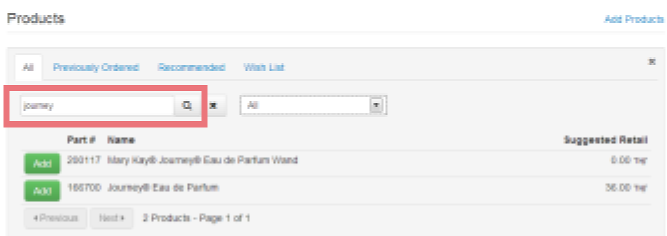
Note: The order can be reopened and edited at any time.

How to Add Products to an Order

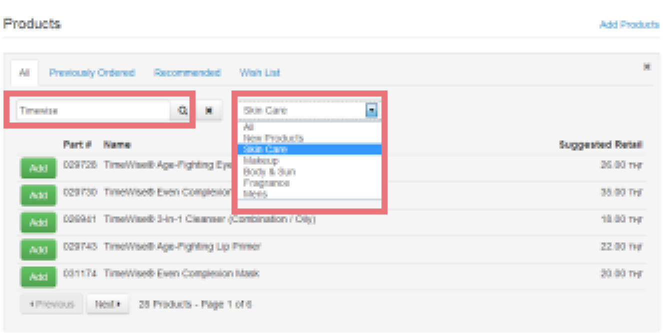
<table>
<tr>
<td>
</td>
<td>First click the Add Products button.</td>
</tr>
<tr>
<td>
</td>
<td>The Products section opens.</td>
</tr>
<tr>
<td>
</td>
<td>Add products to the order by,

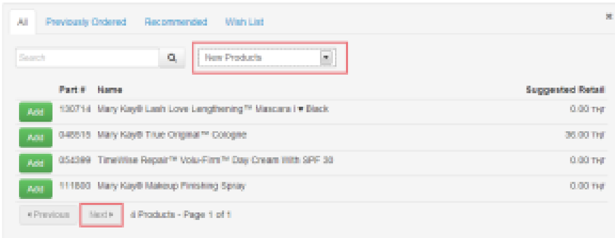
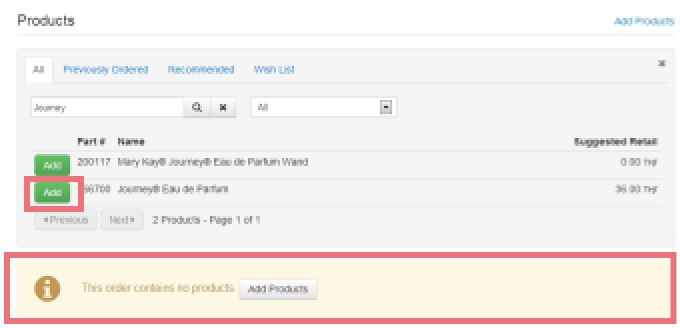
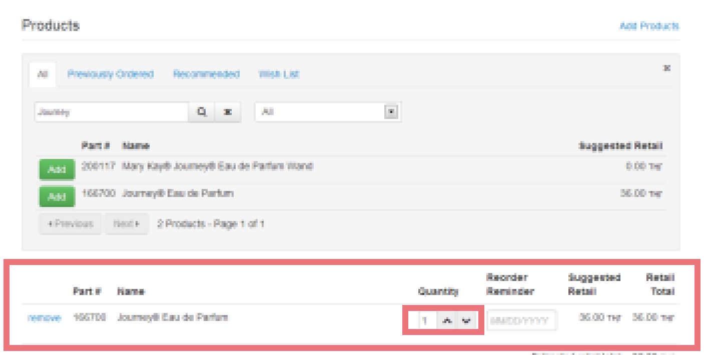
Using the All tab to view products and scroll between pages using the Previous and Next buttons
Opening the Previously Ordered, Recommended or Wish List tabs
Searching for a specific product using Search or Search combined with the Category Filter
Search for products in a specific category by selecting a category from the Category Filter

All is the default view.</td>
</tr>
</table>

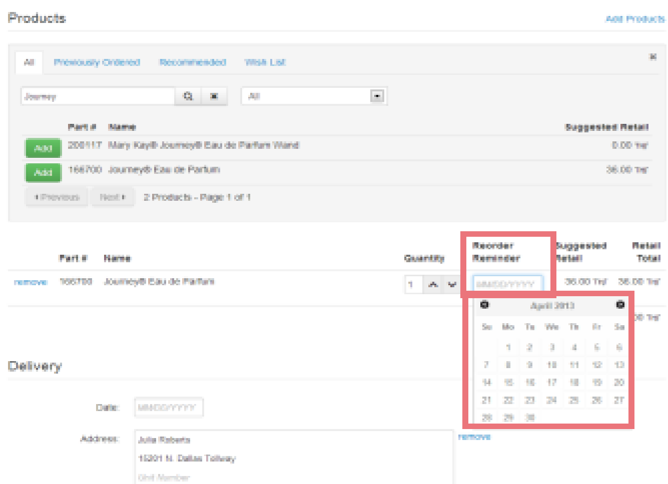
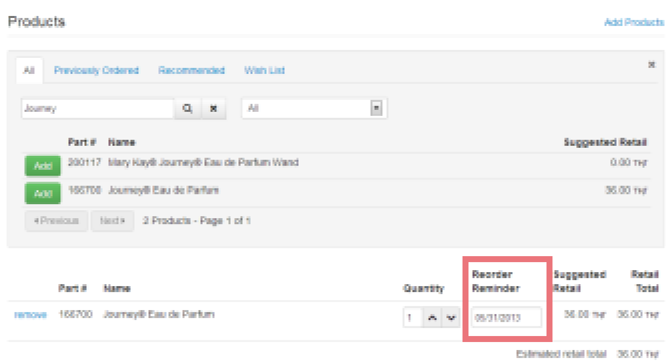
<table>
<tr><td></td><td>When you locate the product you need, click ADD to add the product to the order.</td></tr>
<tr><td>
</td><td>Click the Previously Ordered, Recommended, and Wish List tabs to view and quickly add products your customer has ordered in the past, products recommended for your customer based on her profile or products your customer has selected and added to her wish list.</td></tr>
<tr><td>
</td><td>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.

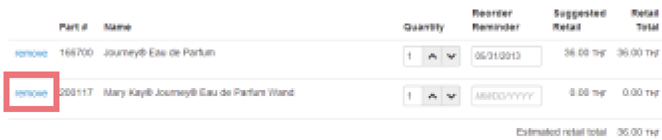
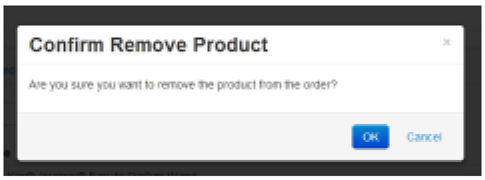
Click ADD to add the product to the order.</td></tr>
<tr><td>
</td><td>You can refine your search by using the Category Filter. After typing the name of the product in the Search field, click the drop-down arrow beside the Category Filter and a list of categories displays. Choose the category. Products matching the product name you entered and the chosen category are displayed automatically.</td></tr>
</table>

	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. 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.
	Once you have located the product, click **Add** to add the product to the order. When a product is added the **Add Products** (yellow bar) below will disappear.
	The **Add Products** bar is replaced with the product you added. Update the quantity by clicking the up or down arrows beside the **Quantity** field.

Adding a Reorder Reminder

	Add a reorder reminder. Click inside the **Reorder Reminder** field. A calendar displays. Select the date for the reorder reminder to be generated. To choose a different month, use the arrows at the top of the calendar to move between months.
	The **Reorder Reminder** field is automatically updated with the date you selected.

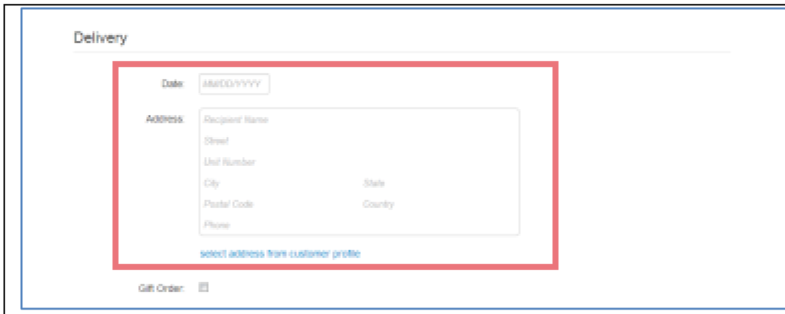
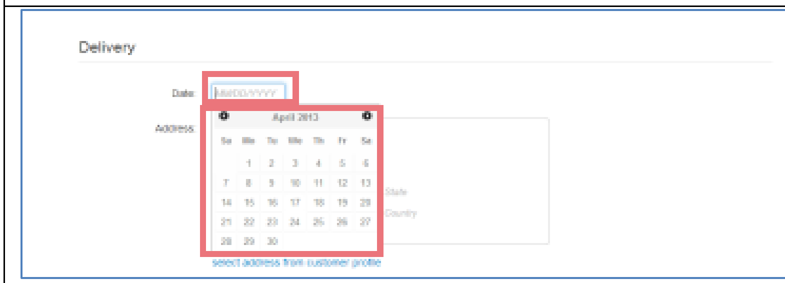
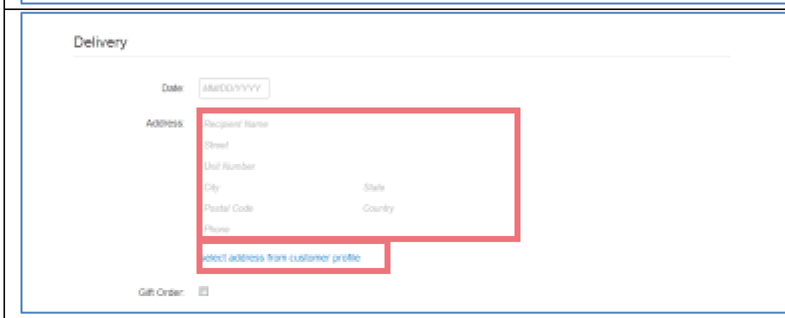
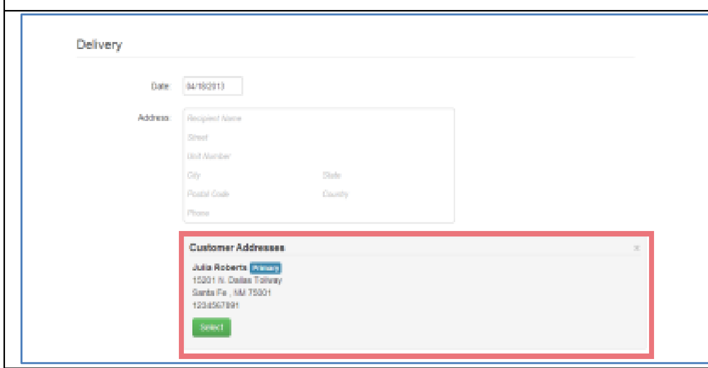
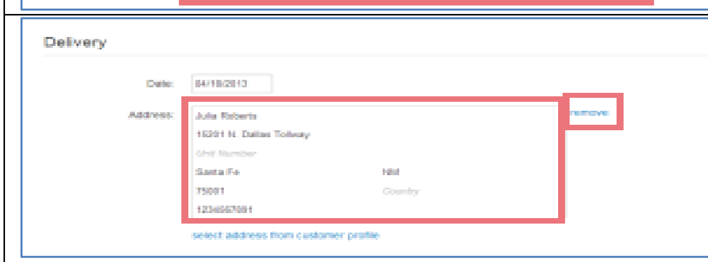
Remove a Product

<table>
<tr>
<td>
</td>
<td>Remove a product by clicking Remove beside the product you want to remove.</td>
</tr>
<tr>
<td>
</td>
<td>A confirmation screen displays.

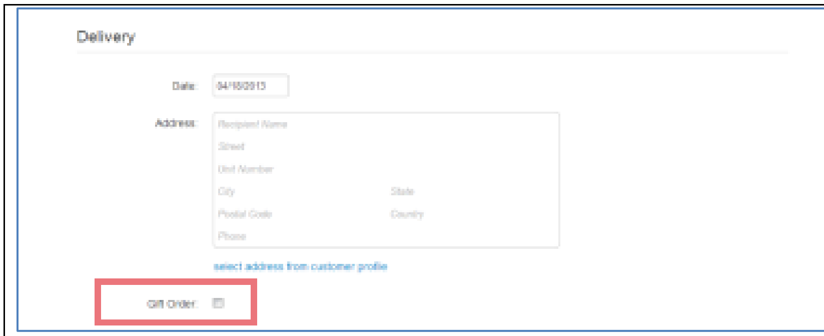
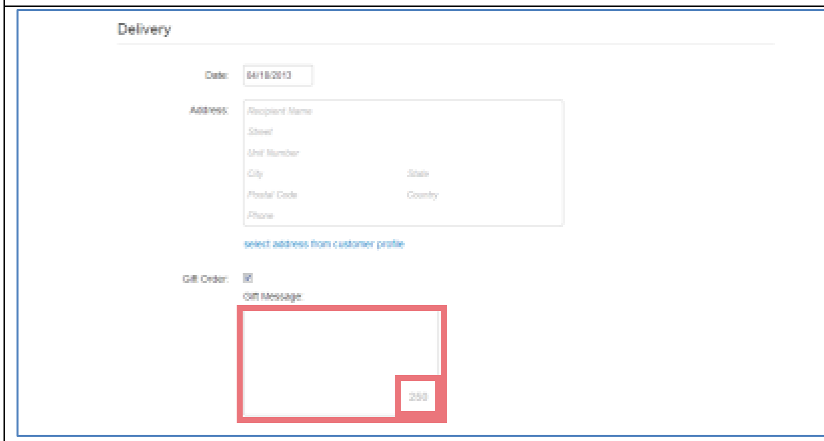
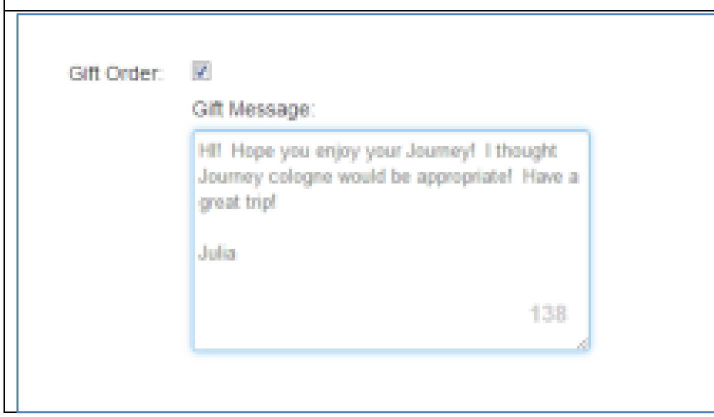
Click Ok to remove the product.

Click Cancel if you do not want to remove the product.</td>
</tr>
</table>

How to Deliver to Another Address

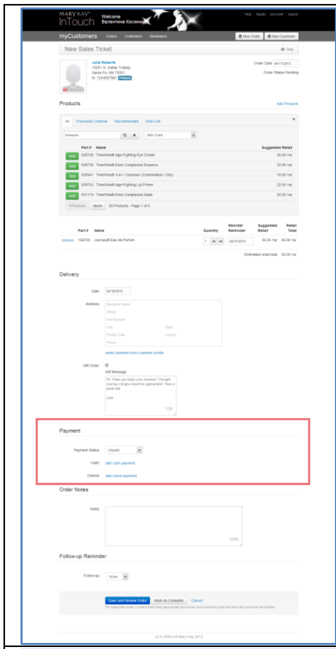
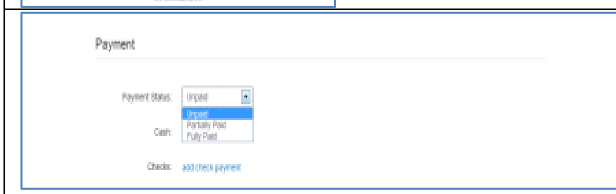
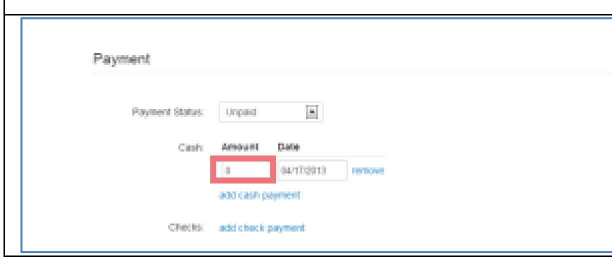
	If the order should be delivered to an address other than the customer's address, use the Delivery section to enter a different delivery address. Note: A different address can be setup in the Customer's Profile.
	Click in the Date field to enter a date. A calendar displays. Select the delivery date for the order.
	Enter the name, address and phone for the recipient in the appropriate fields. Note: If the address is in the customer's profile, click the link "Select address from customer's profile."
	A **Confirmation** box displays to confirm this is the address you want to add. Click **Select** to add the address or click the **"X"** to close the box and not add the address.
	The address is added after you have clicked **Select**. To remove the address, click **Remove**.

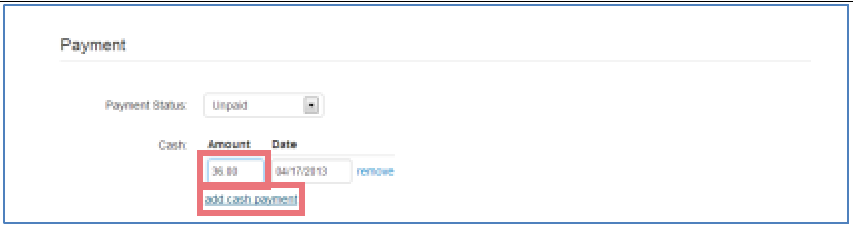
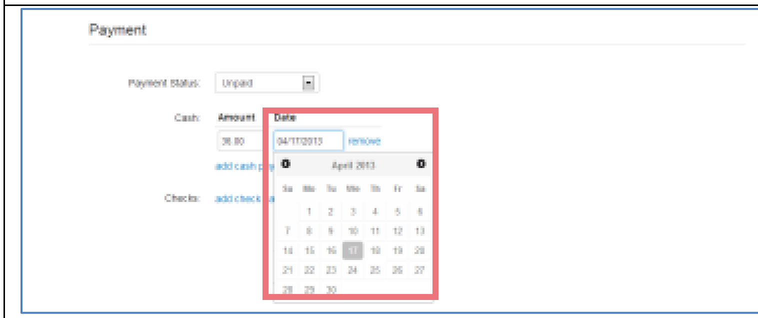
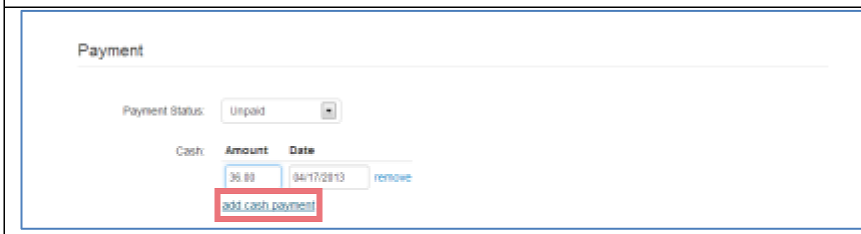
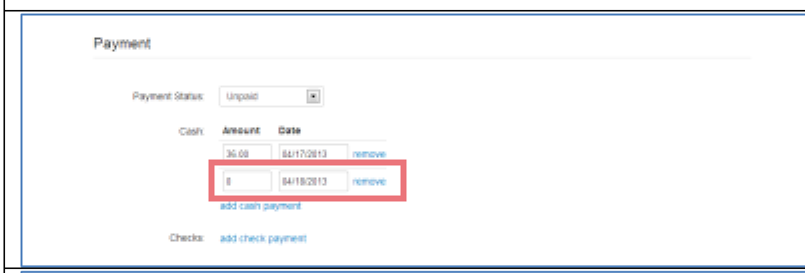
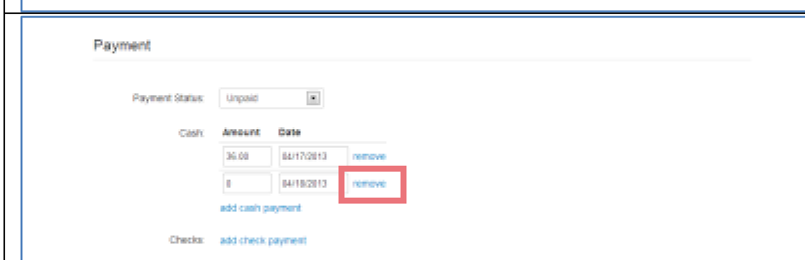
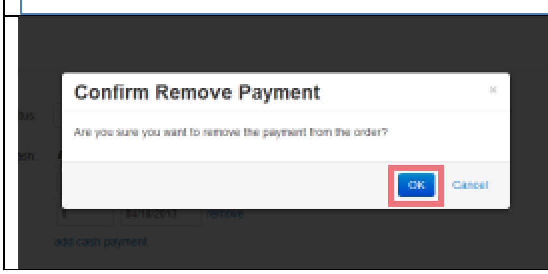
How to Add a Note for a Gift

	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.

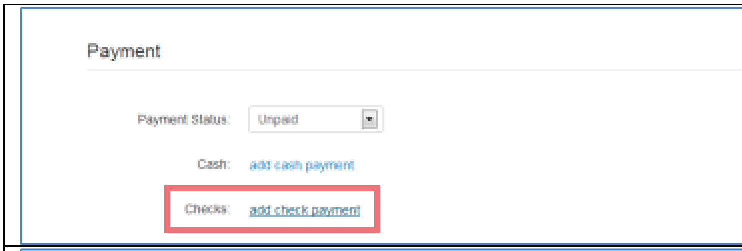
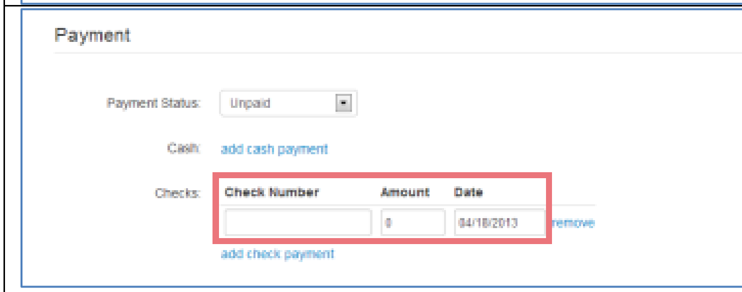
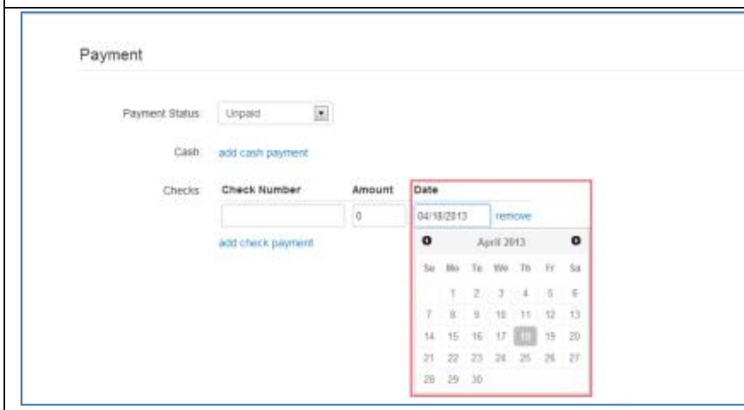
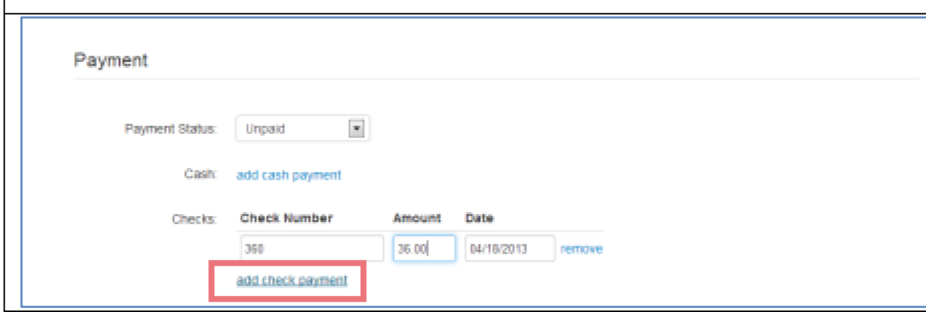
How to Add a Cash or Check Payment for an Order

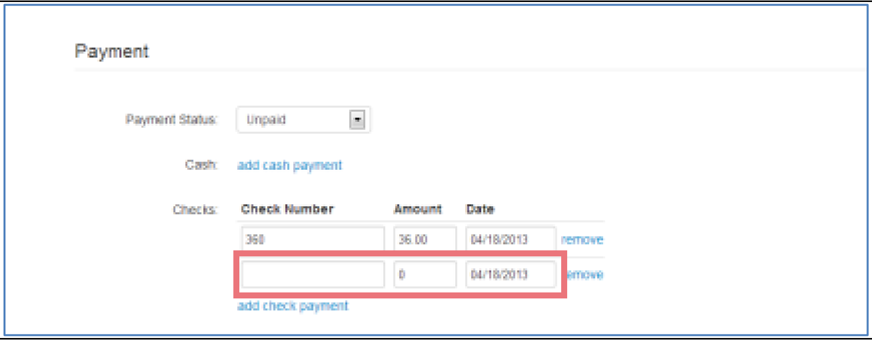
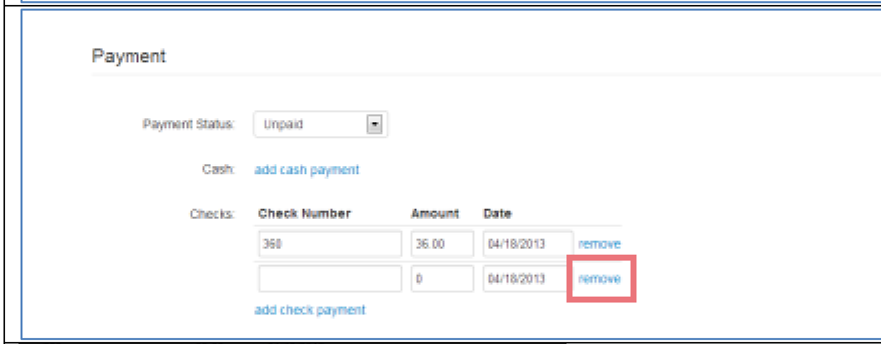
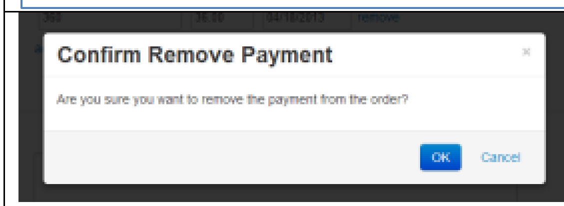
Cash Payment

	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.

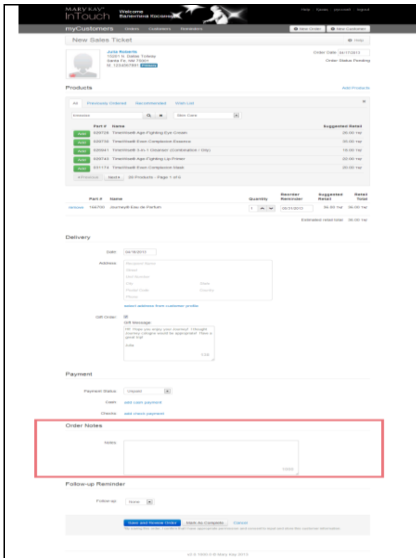
	Enter the amount of the order or a partial payment in the **Amount** field.
	For your convenience the current date is displayed in the **Date** field. To change the date, click inside the **Date** field. A calendar automatically displays. Choose the correct date. The date is immediately displayed in the **Date** field.
	When you have completed entering the payment click the link, "add cash payment."
	A second set of fields open to enter any additional payments.
	To remove a payment, click **Remove**.
	A confirmation screen displays. Click **OK** to continue and remove the payment. Click **Cancel** if you choose not to remove the payment.

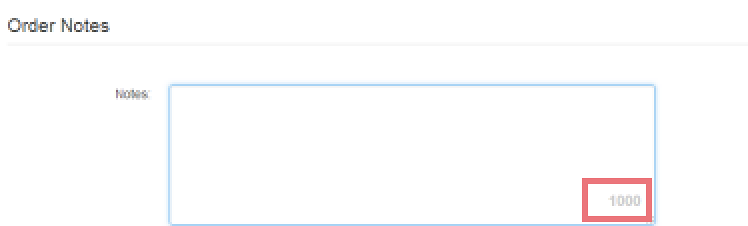
Check Payment

	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."**

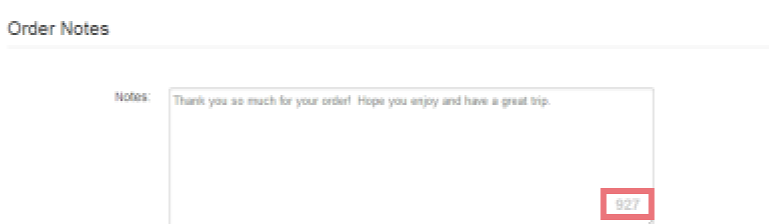
<table>
<tr>
<td>
</td>
<td>A second set of fields open to enter any additional payments.</td>
</tr>
<tr>
<td>
</td>
<td>To remove a payment, click Remove.</td>
</tr>
<tr>
<td>
</td>
<td>A confirmation screen displays. Click OK to continue and remove the payment. Click Cancel if you choose not to remove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

How to Add Notes to an Order

<table>
<tr>
<td>


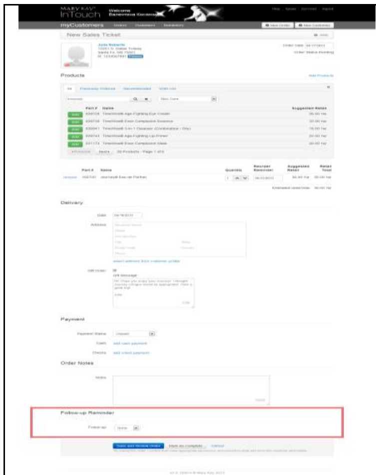
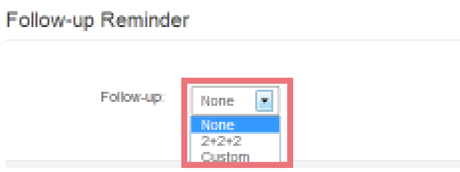
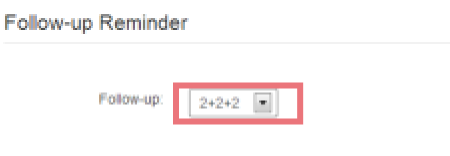
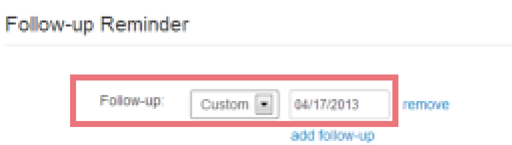
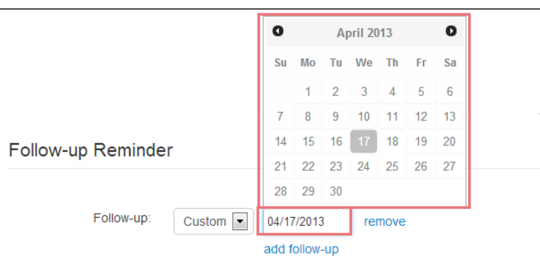
</td>
<td>In the Notes section, you can add a note to your customer that will be included on the invoice.</td>
</tr>
<tr>
<td>


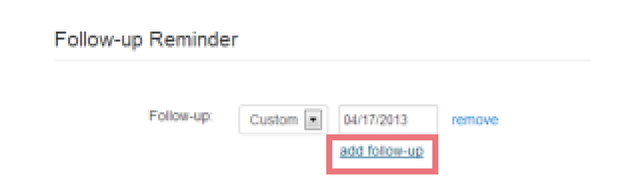
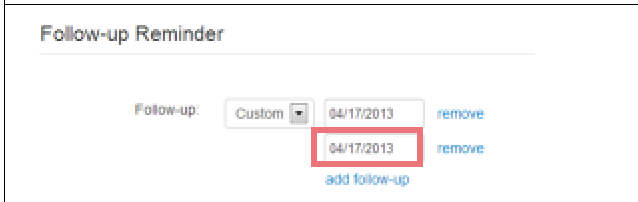
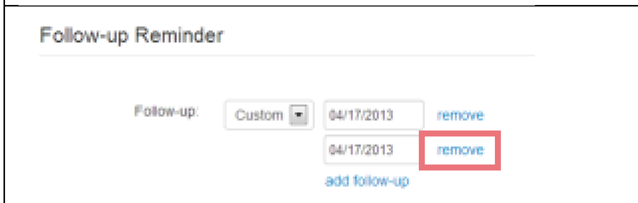
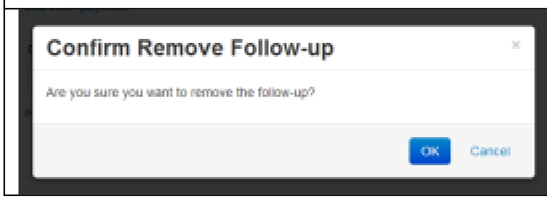
</td>
<td>To add notes, click inside the Notes field and enter the note.

In the corner of the field is 1000. This number represents the maximum number of characters allowed.</td>
</tr>
<tr>
<td>


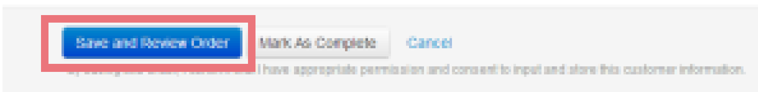
</td>
<td>Click inside the field and type your message. The number will decrease to let you know when you are close to the maximum limit.</td>
</tr>
</table>

How to Add a Follow-Up Reminder

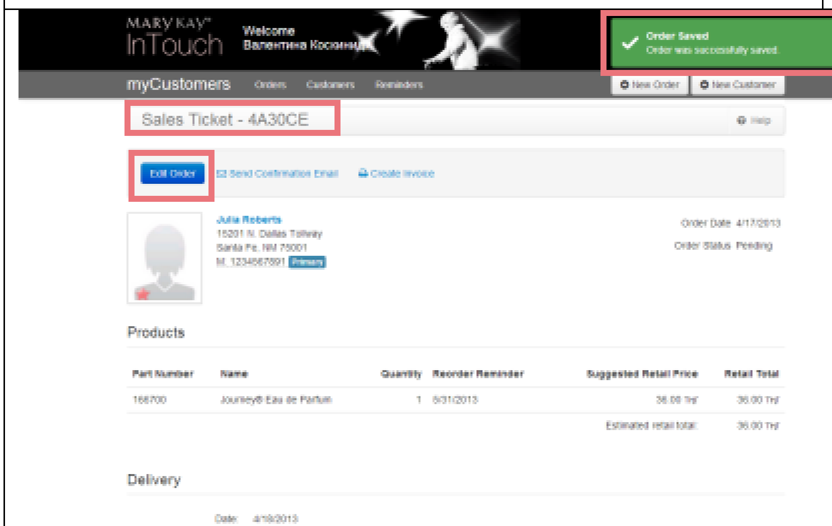
	Setup a **Follow-Up Reminder** to help you to remember when to follow up with your customer concerning her product purchase.
	Follow-up reminder options are None, 2+2+2 and Custom. Click the down arrow to select the follow-up option.
	To use a preset reminder, choose the **2+2+2** option. When you choose 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.
	To setup a custom follow-up reminder, select the **Custom** option. A date field opens with the current date.
	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.

<table>
<tr>
<td>
</td>
<td>To add another follow-up reminder, click the link, “add follow-up.”</td>
</tr>
<tr>
<td>
</td>
<td>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..</td>
</tr>
<tr>
<td>
</td>
<td>To remove a follow-up reminder, click Remove.</td>
</tr>
<tr>
<td>
</td>
<td>A confirmation screen displays. To remove the reminder, click Ok. If you choose not to remove the reminder, click Cancel.</td>
</tr>
</table>

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.

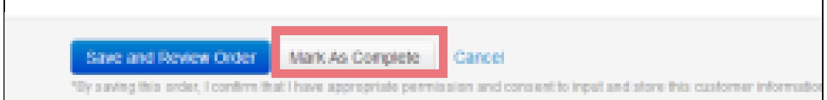


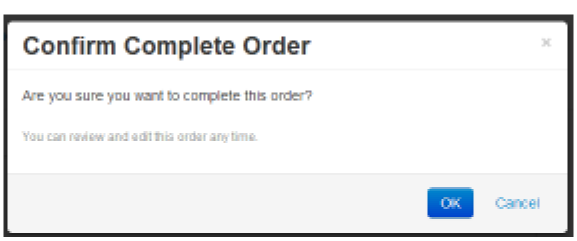
A confirmation displays on the **Review Order** page confirming the order was saved successfully.

An **Order Number** is assigned to the order.

To reopen the order and continue working, click **Edit Order**.

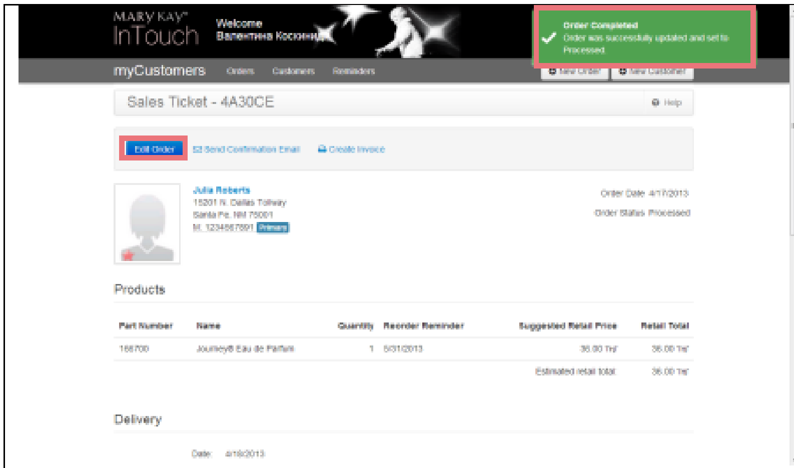
Once the order is complete, click Mark As Complete.





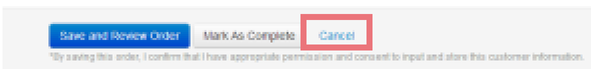
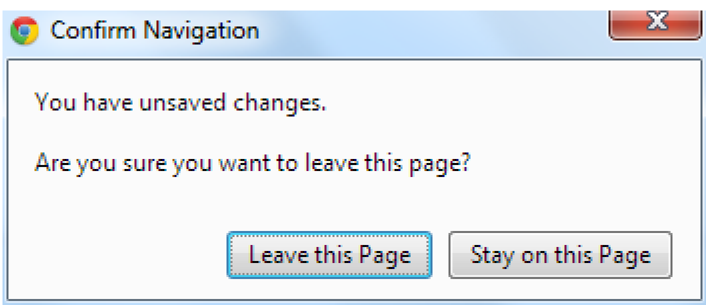
A confirmation screen displays to confirm you want to complete the order. Click Ok to continue and complete the order. Click Cancel if you don't want to complete the order.

Note: You can review and edit the order any time.

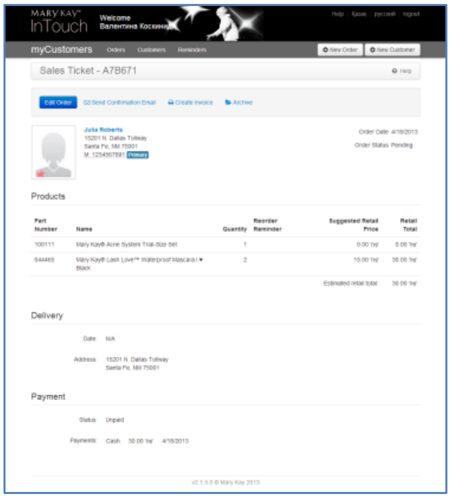
<table>
<tr>
<td>
</td>
<td>A confirmation displays on the Review Order page confirming the order was successfully completed.

An Order Number is assigned to the order.

The status has been changed from Pending to Processed.

To reopen the order and make changes, click the Edit Order button.</td>
</tr>
<tr>
<td>
</td>
<td>To cancel the order, click Cancel.</td>
</tr>
<tr>
<td>
</td>
<td>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.</td>
</tr>
</table>

How to Review A Order



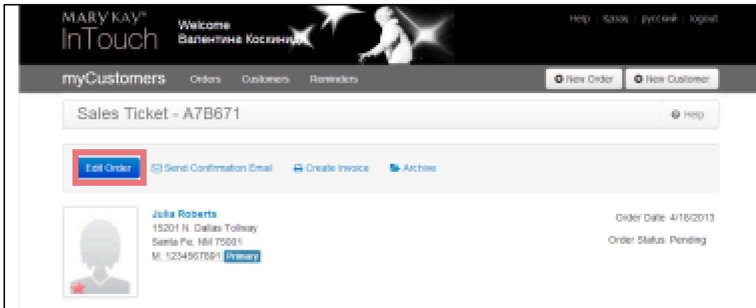
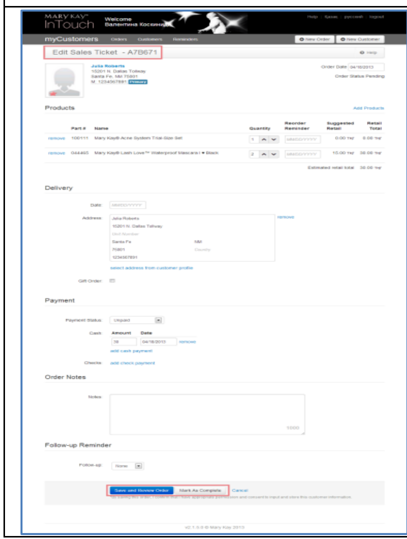
Clicking **Save and Review** or **Mark as Complete** opens the **Review Order** page.

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

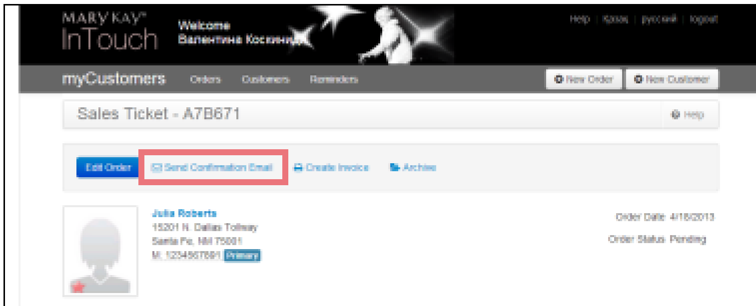
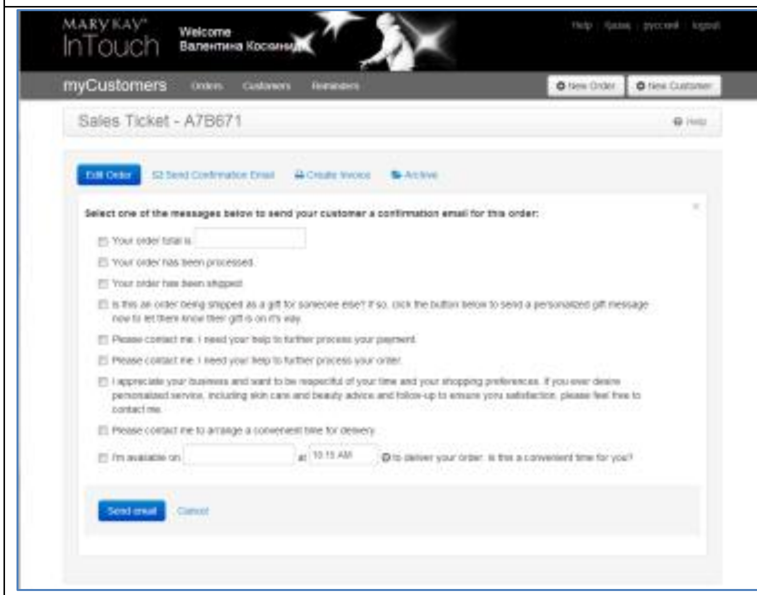
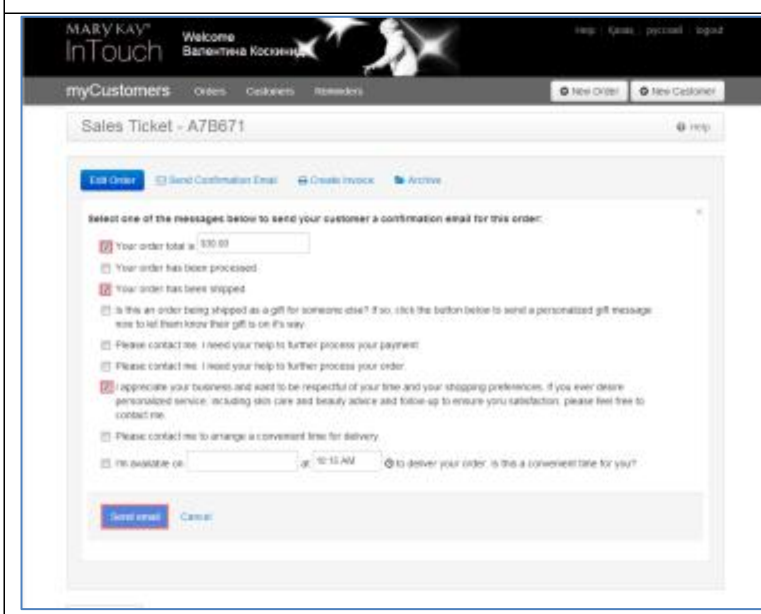
If the **Save and Review** button was used, the status on the **Review Order** page is **Pending**.

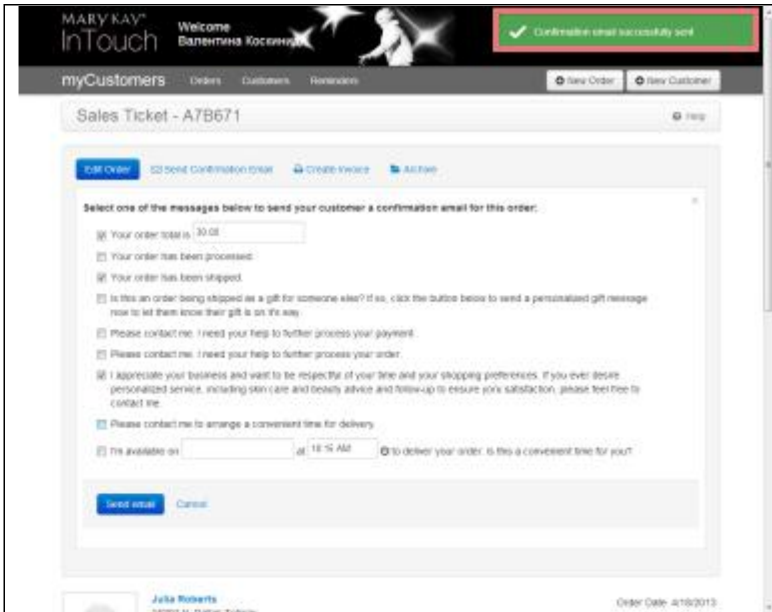
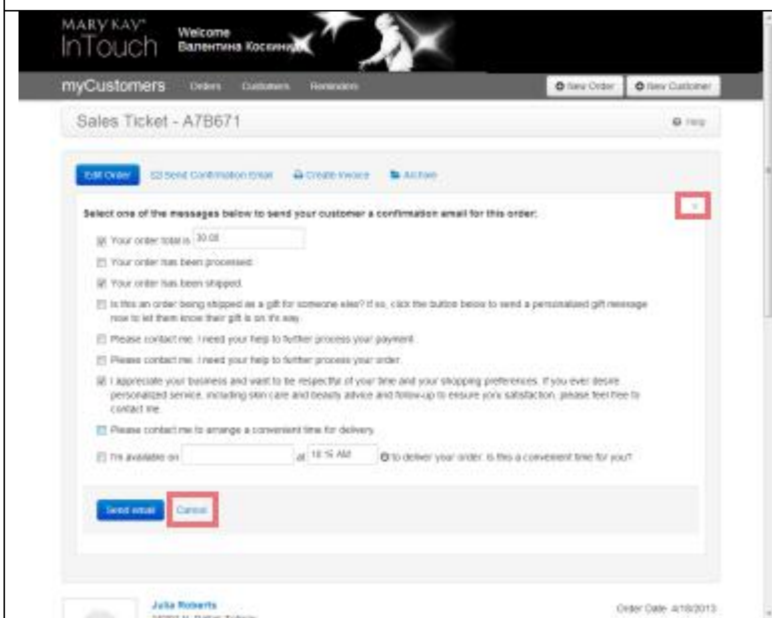
If the **Mark as Complete** button was used, the status on the **Review Order** page is **Processed**.

How to Make Changes to an Order

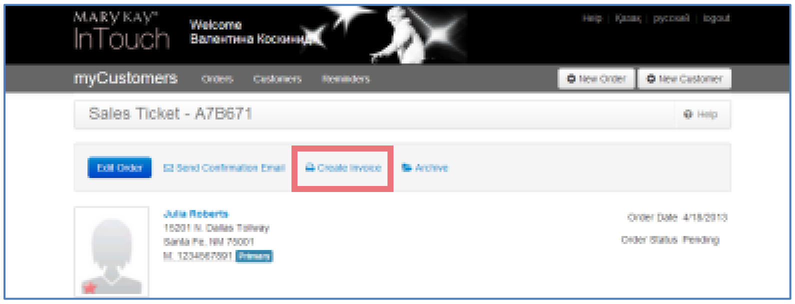
	Click **Edit Order** to make changes to the order.
	The **Edit Sales Ticket** page opens. Once you are finished making changes, click the **Save and Review** or **Mark as Complete** button to save your changes and go to the **Review Order** screen.

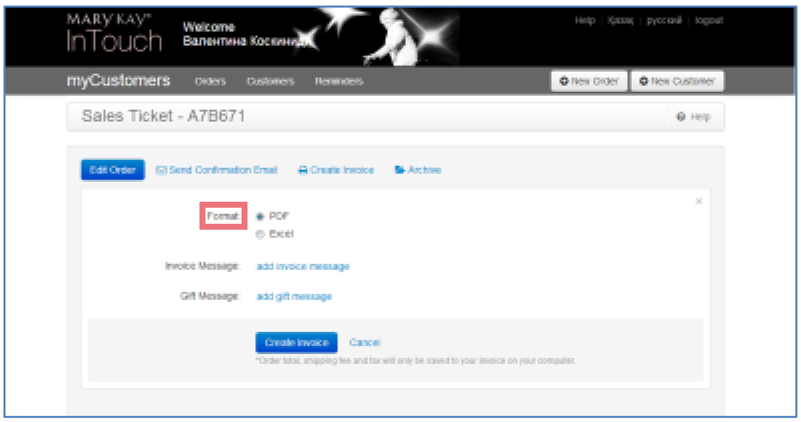
How to Send a Confirmation Email

	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.
	The **Confirmation Email** screen displays. Click the **checkbox** to select one or more of the messages to be included in the confirmation email.
	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

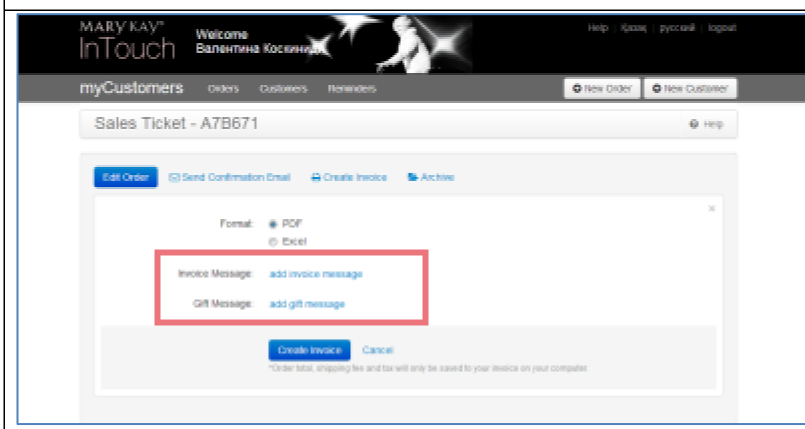
<table>
<tr>
<td>


</td>
<td>To create an invoice for the order, click Create Invoice.</td>
</tr>
<tr>
<td>


</td>
<td>The Create Invoice screen displays.

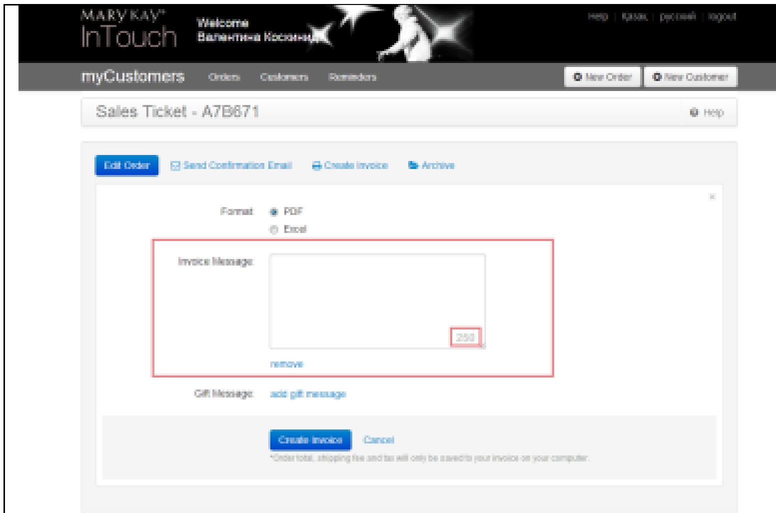
You have the option to create the invoice in a PDF or Excel format.

Note: If the invoice is created in a PDF format it will not be editable.

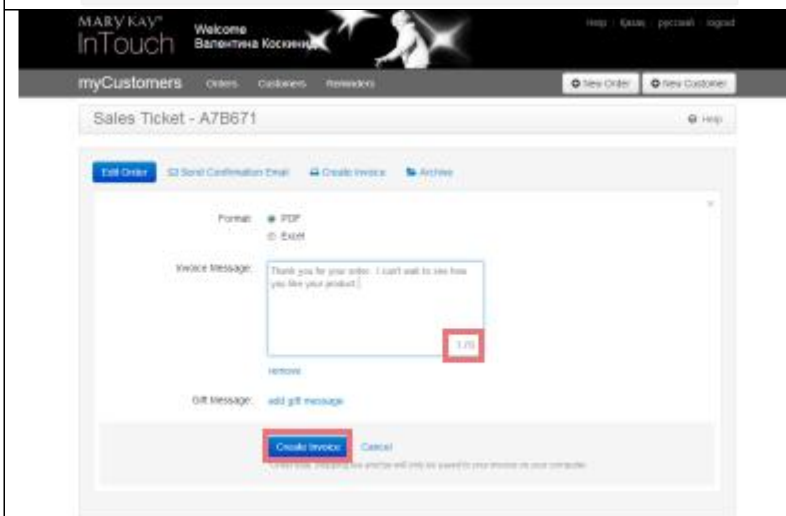
Choose the radio button beside the format you wish to use.</td>
</tr>
<tr>
<td>


</td>
<td>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.</td>
</tr>
</table>

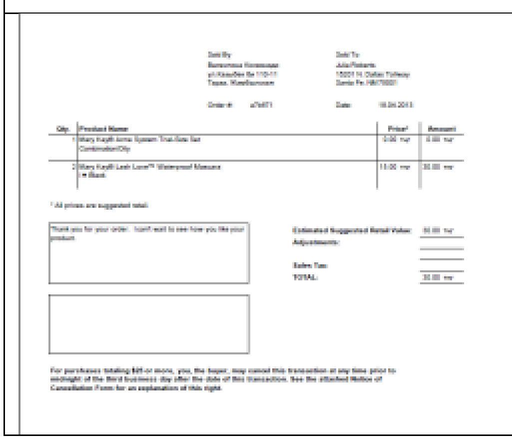


The **Message** box is displayed. Up to 250 characters can be entered.



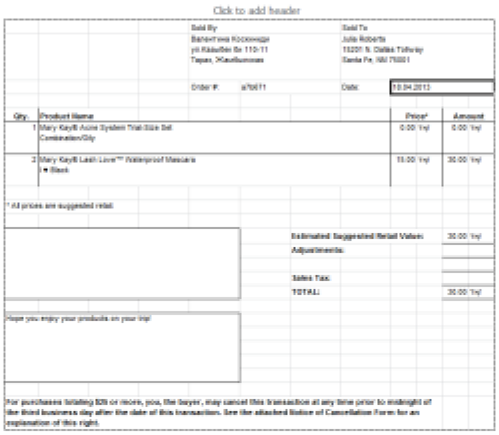
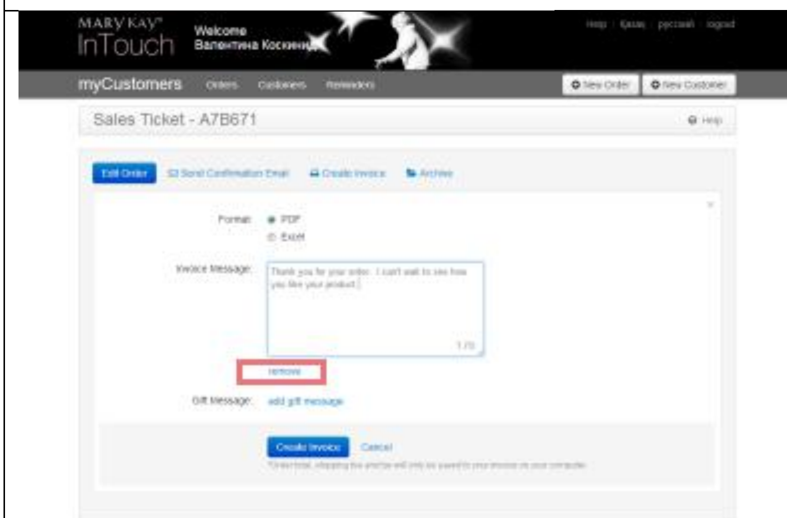
As the message is entered, the number in the right corner counts down the remaining number of characters available for the message.

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

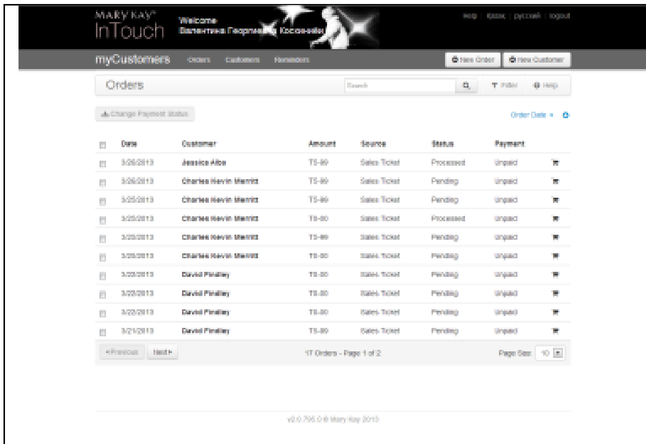


The invoice is created and available to open and print.

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

	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.

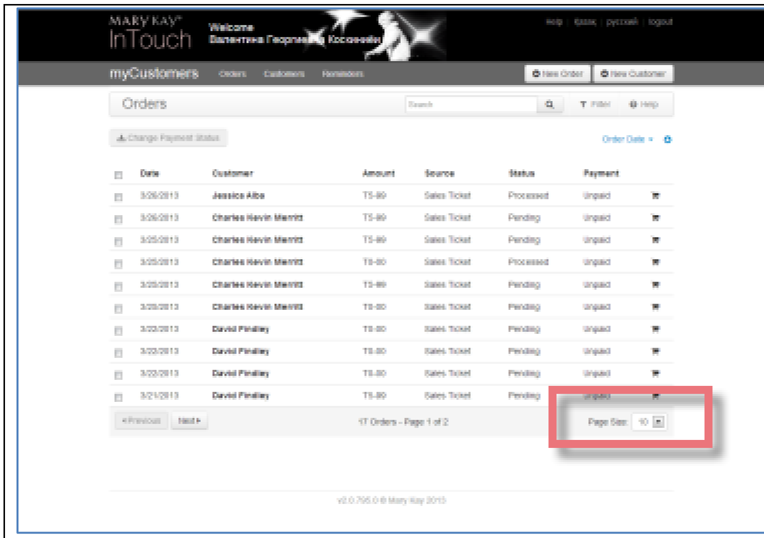
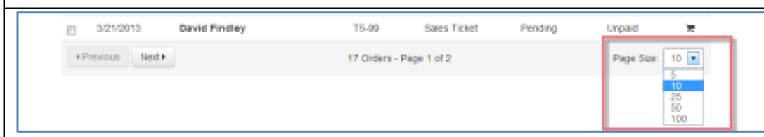
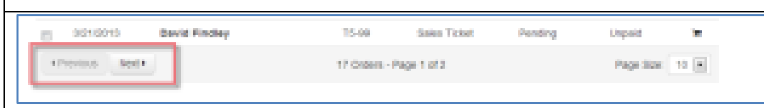
Orders Page



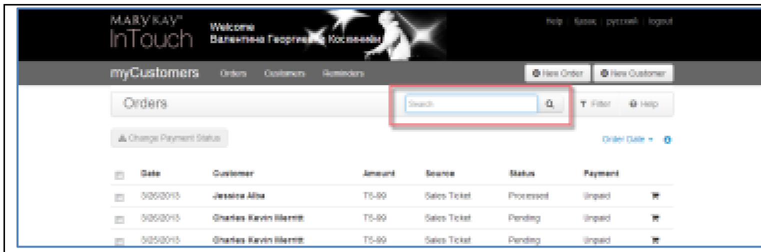
On the **Orders** page you can,

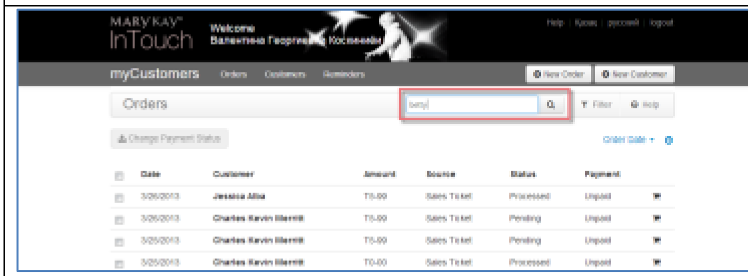
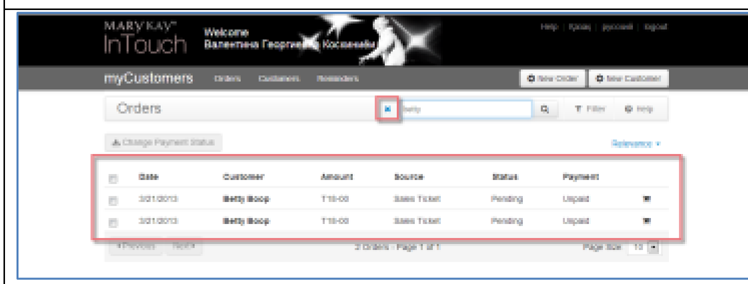
- Orders Page Overview
- Search
- Advanced Search
- Filter orders based on pre-defined criteria such as, Order Date, Order Status, Order Source, Payment Status or Archived.
- Change Payment Status of an order to Unpaid, Partially Paid or Fully Paid
- Archive orders you no longer want on your order list.
- 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

	The default number of customers orders displayed on each page is 10.
	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.
	Click the **Previous** and **Next** buttons to move between pages

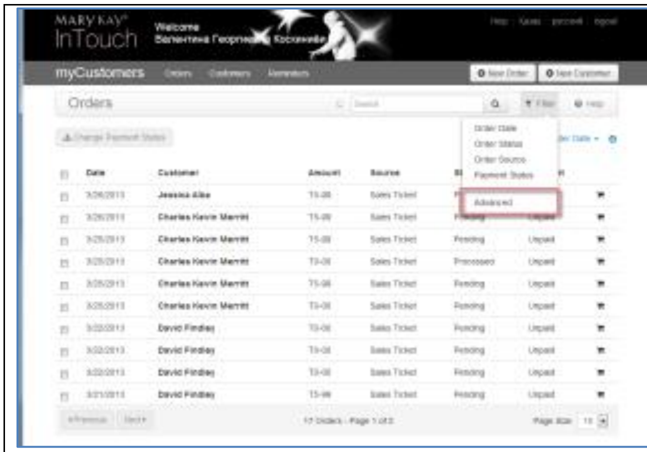
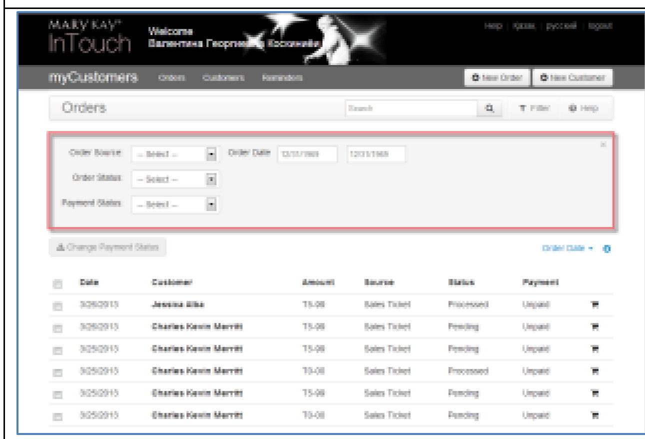
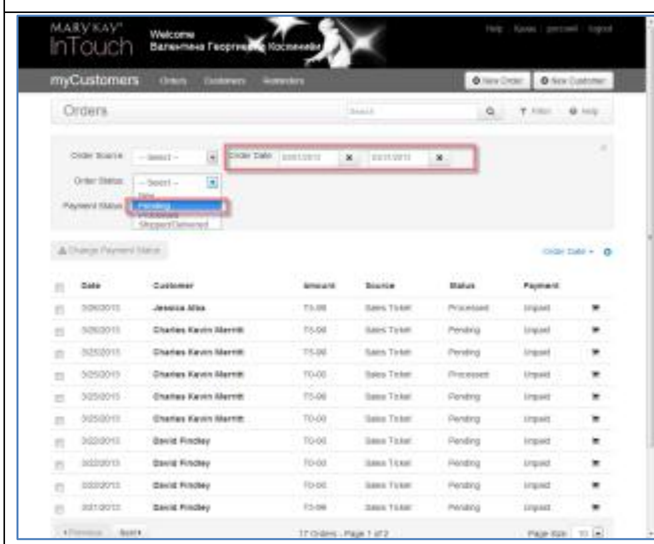
How to Search on the Orders Page

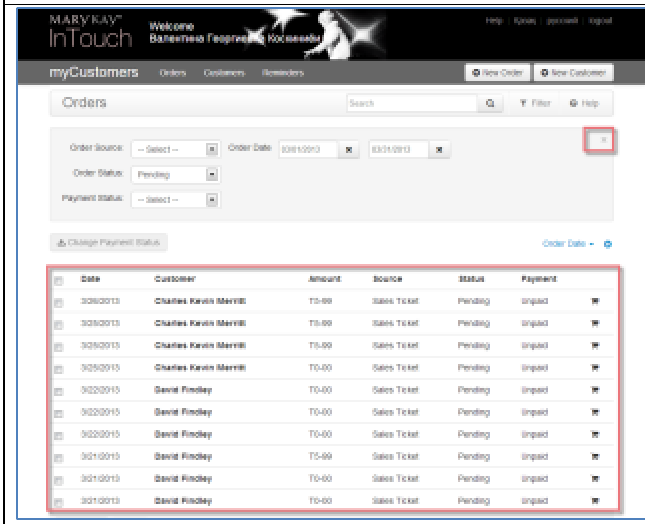
<table>
<tr>
<td>
</td>
<td>myCustomers provides a variety of search options you can use to find the exact information you need.

To get started, click inside the Search field.</td>
</tr>
<tr>
<td>
</td>
<td>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.)</td>
</tr>
<tr>
<td>
</td>
<td>The customer's orders are displayed.

Click the blue "X" beside the Search field to clear it and return to the Order List.</td>
</tr>
</table>

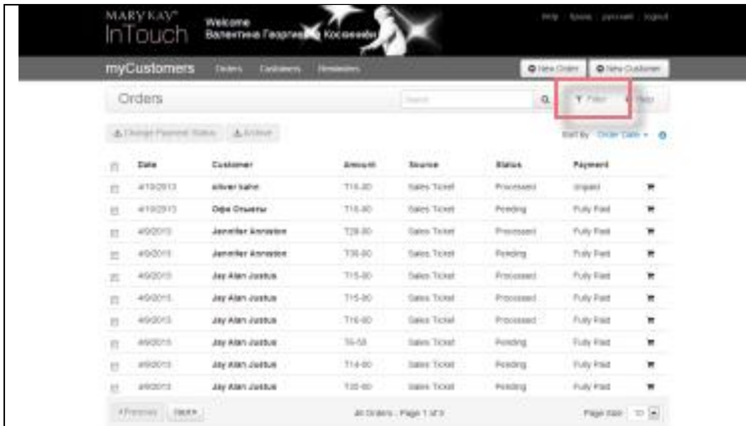
How to Use the Advanced Order Search

	**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**.
	The **Advanced Search** section is displayed.
	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.

<table>
<tr><td></td><td></td></tr>
<tr><td>
</td><td>Immediately the March orders with a pending order status are displayed

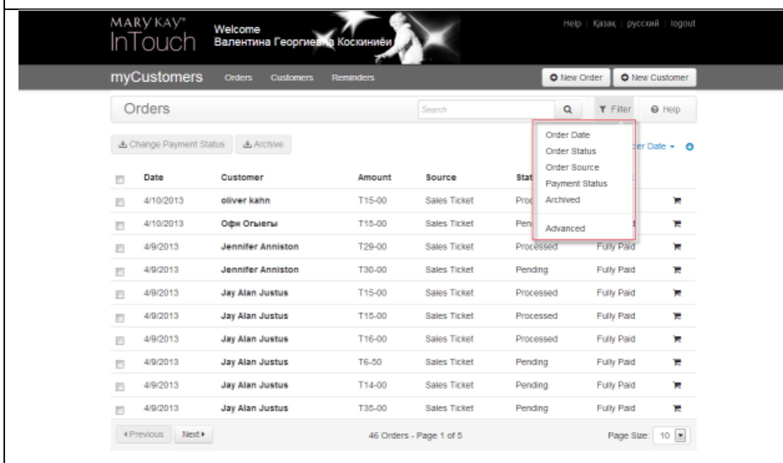
To close the Advanced Search section, click the “X” in the upper right hand corner and you are automatically returned to the original order list.</td></tr>
</table>

How to Filter Orders



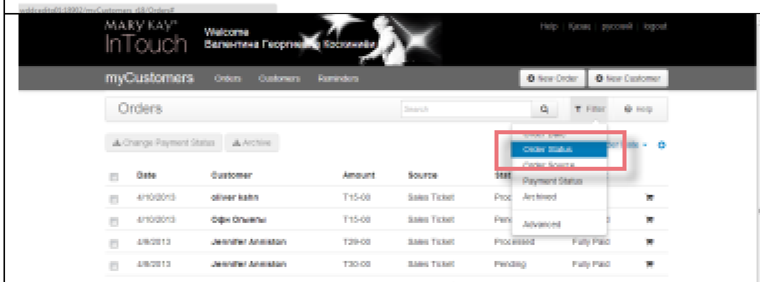
Use the **Filter** on the **Orders** page to quickly sort orders into a specified category.

To begin, click **Filter**.

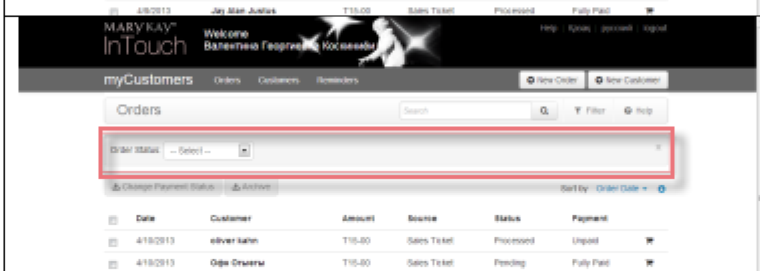


A drop-down menu displays.

Select one of the following categories from the list; **Order Date, Order Status, Order Source, Payment Status**, or **Archived**.

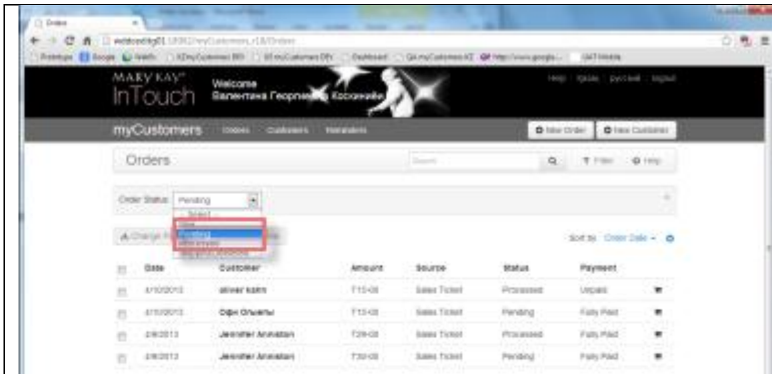
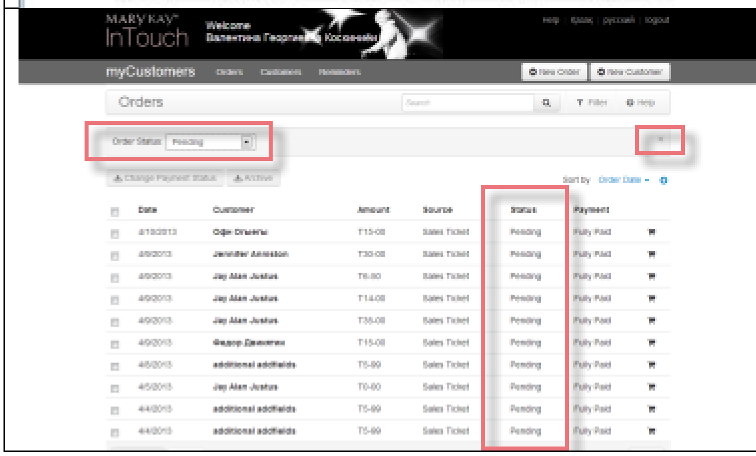


For this example we have selected “Order Status”.

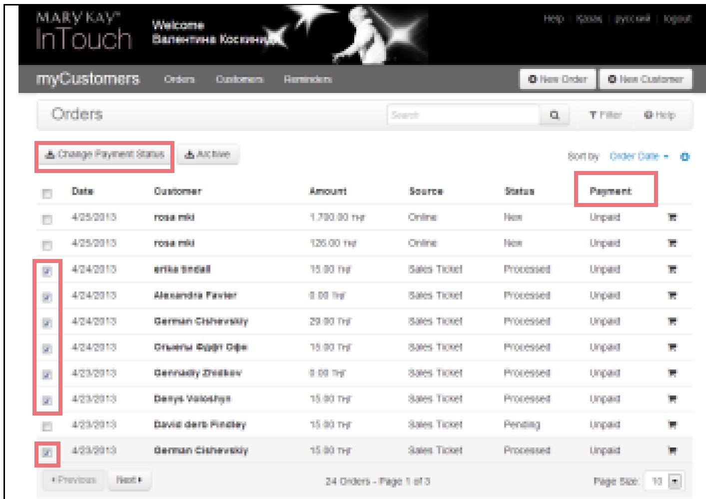
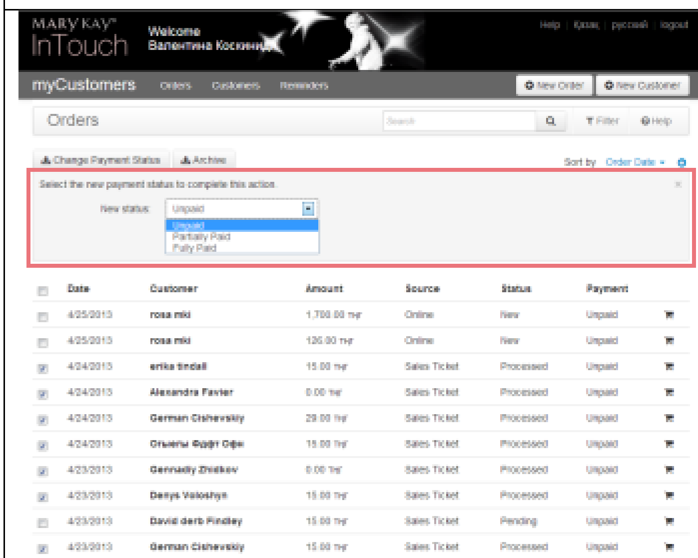
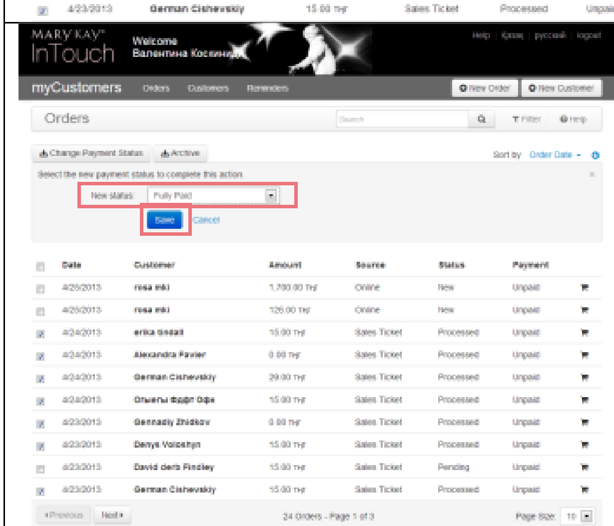


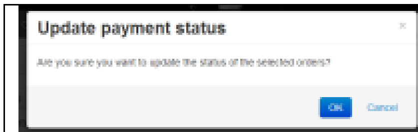
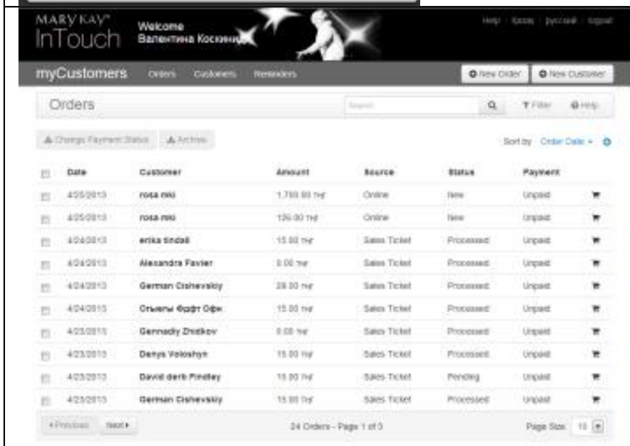
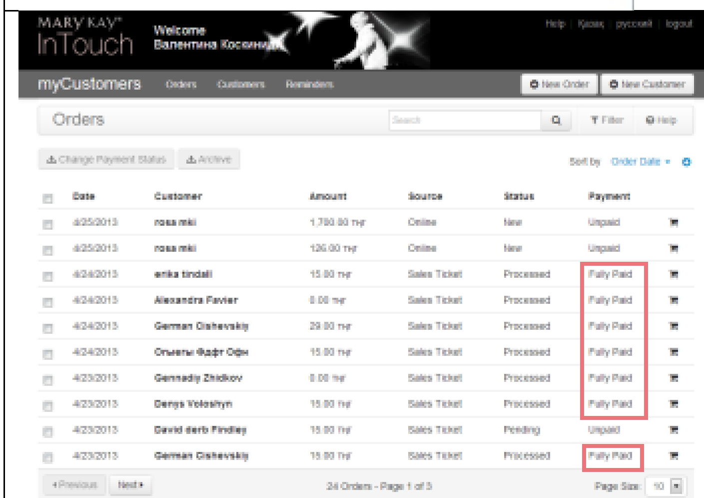
The **Order Status** field displays.

Click the down arrow to select a status.

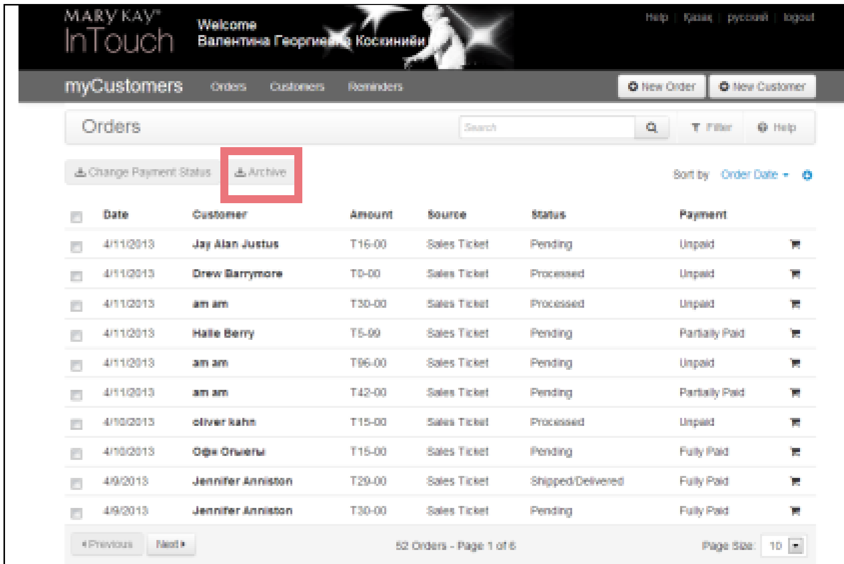
	For this example, we have selected "Pending".
	A list of customers who have orders with a "Pending" order status is displayed. Click the **"X"** to close the **Order Status** field and return to the original order list.

How to Change the Payment Status of an Order

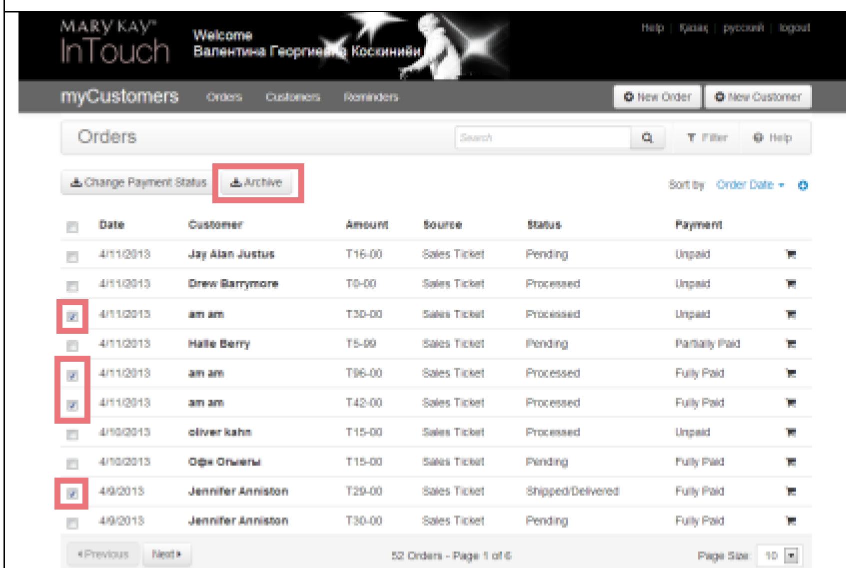
	You can easily change the payment status for one or more orders. To activate the **Change Payment Status** button and change the status for one or more orders, click the **checkbox** beside the order or orders that need a status change. Click the **Change Payment Status** button.
	The **Payment Status 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
	For this example we will select Fully Paid. Click **Save.**

	A **Confirmation** screen displays to confirm that we really do want to change the payment status for the selected orders.
	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.
	After the page is refreshed the changes are displayed.

How to Archive Orders

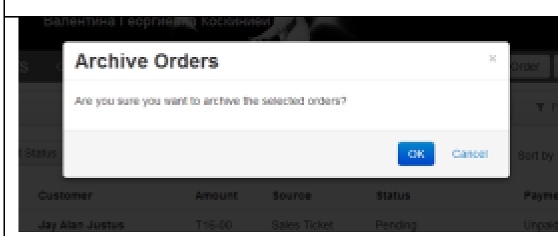


Archiving orders is a great way to manage orders that are complete and required no additional work.



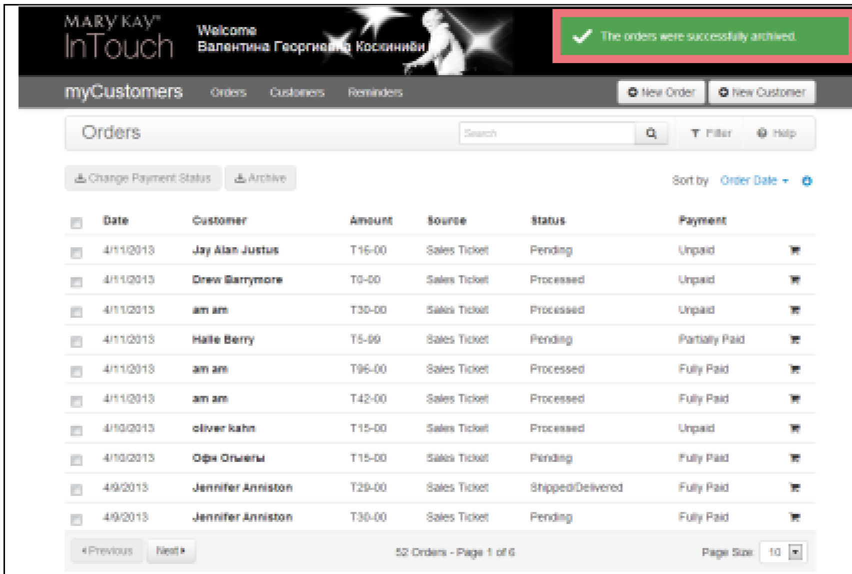
To archive one or more orders, click the **checkbox** beside each of the orders you want to archive.

Click the **Archive** button



A confirmation screen displays to confirm you want to archive the selected orders.

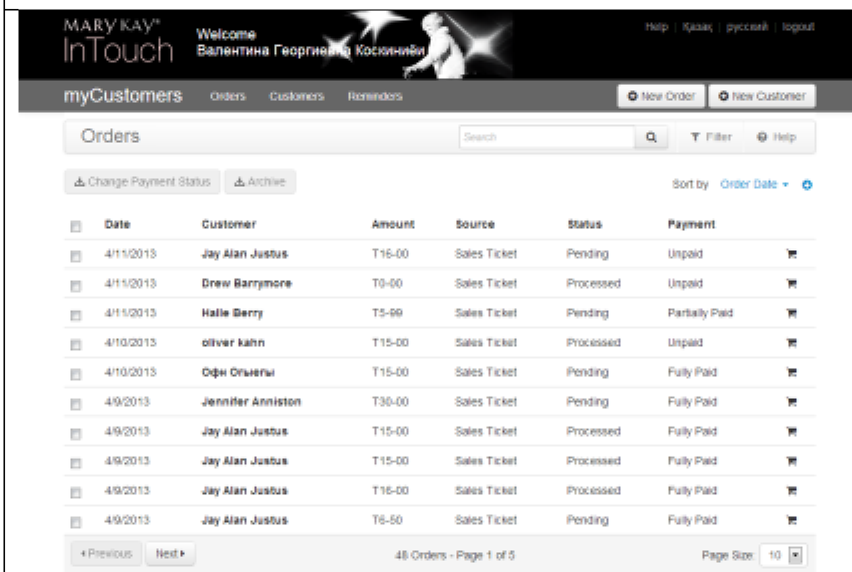
Click **OK** to continue.



A confirmation screen displays to confirm the archive was successful.

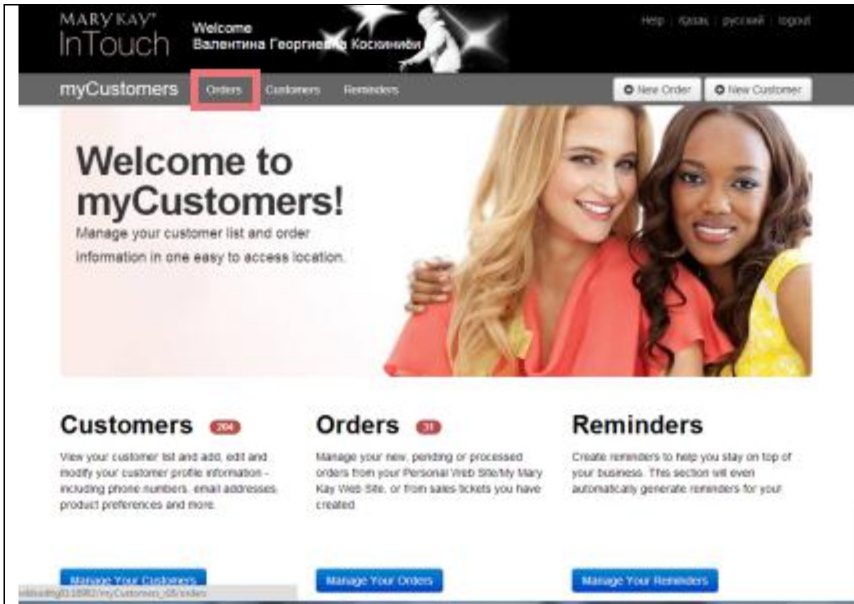
The archived orders appear to still be on the page.

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.

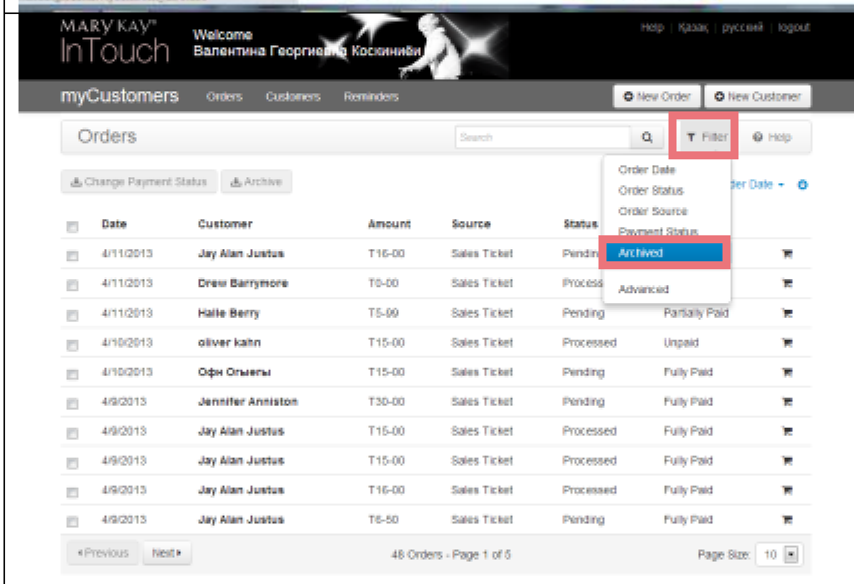


Once the page is refreshed the archived orders are no longer on the page.

How to View Archived Orders

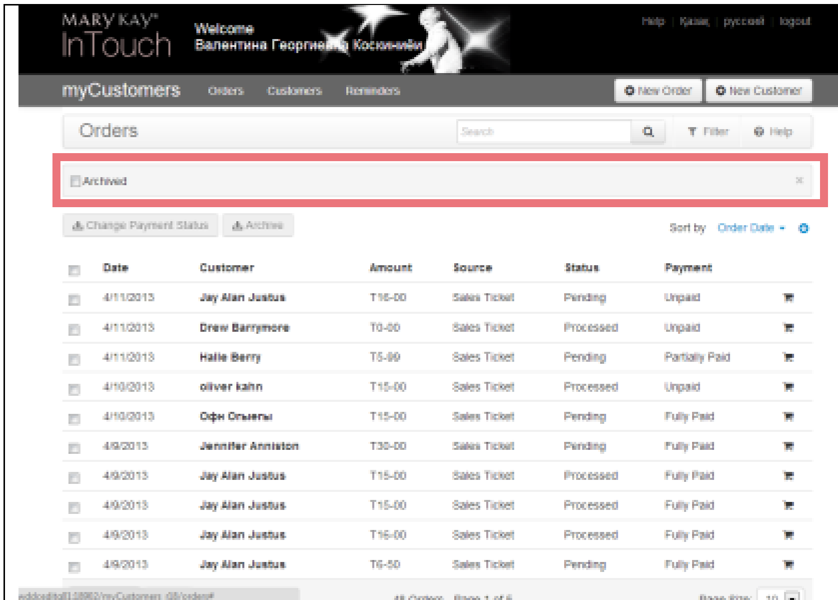


To view archived orders, open the order list by clicking Orders on the navigation bar.



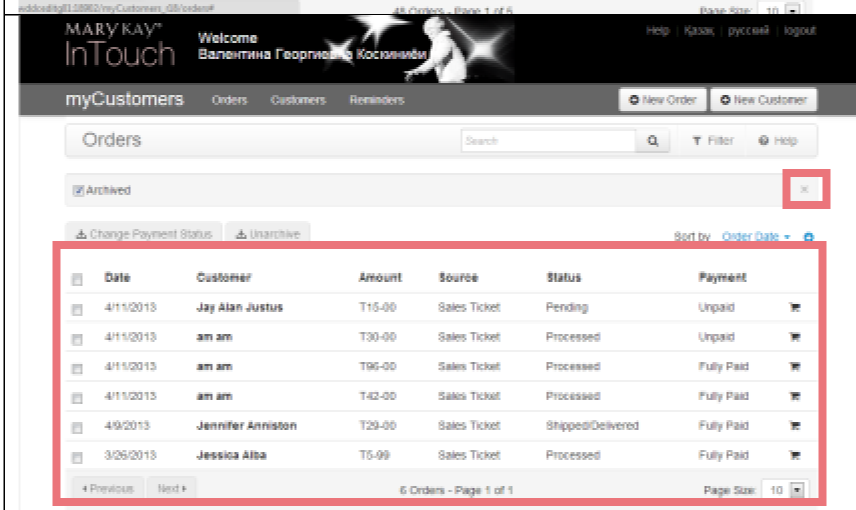
Click **Filter.**

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



The Archived selection bar displays.

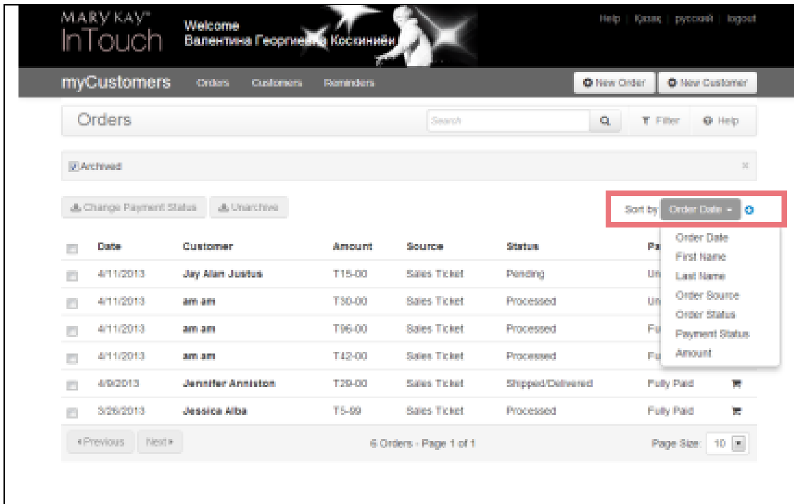
Click the **checkbox** beside Archived.



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.

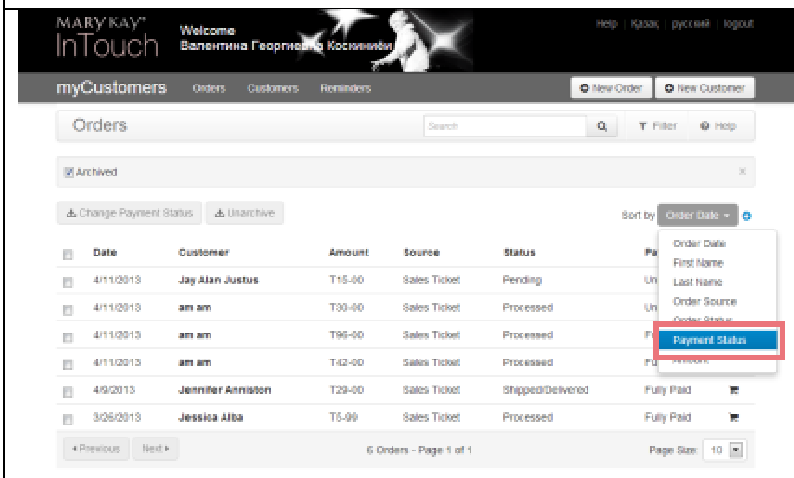
How to Sort the Order List



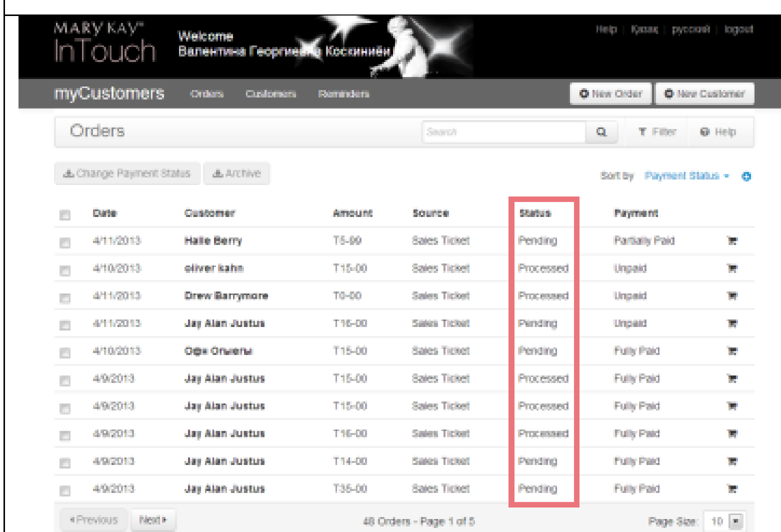
By default the order list is sorted by the date that orders are received.

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.

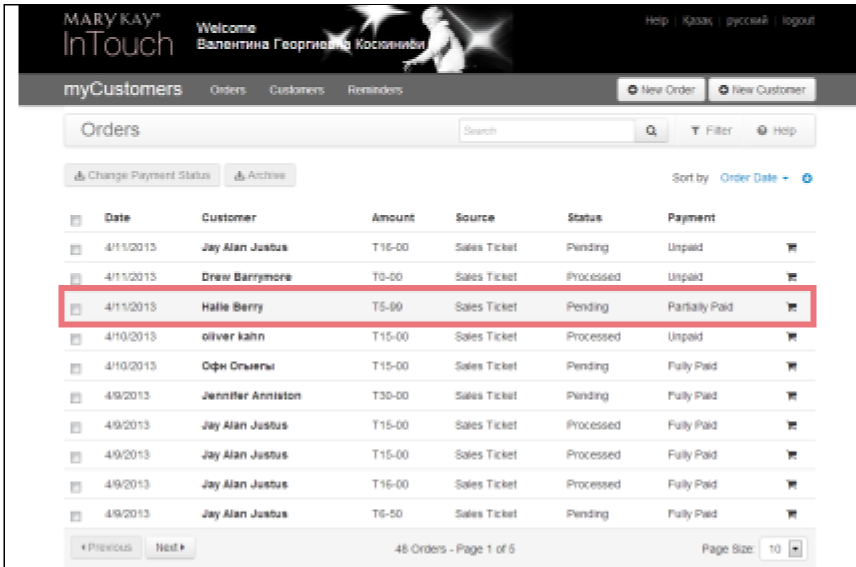


Select the sort category. For this example, we will use **Payment Status**.



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

How to Open an Existing Order

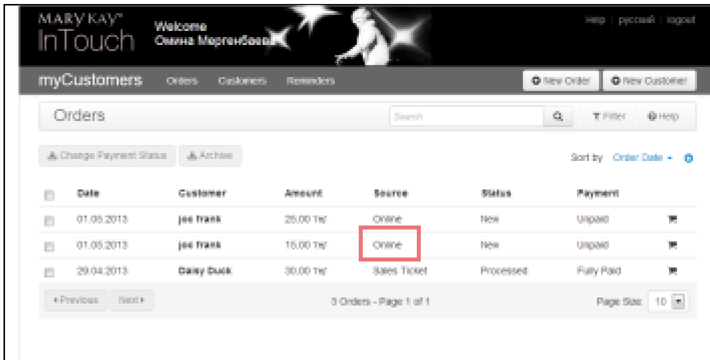


To open an order from the Order List is easy.

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

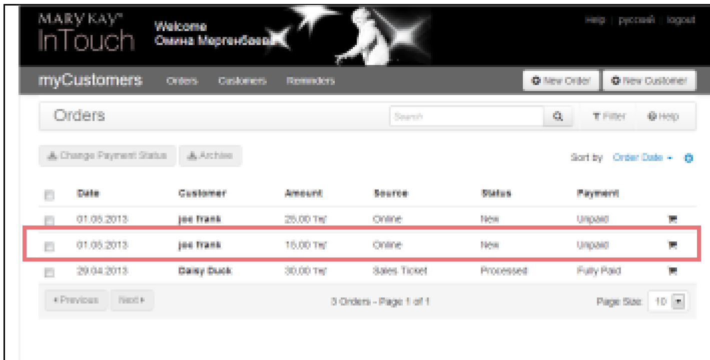


Online orders are orders you created by your customer online in your Personal Website and submitted to you. They are displayed on the **Order List** and the source is **Online**.

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



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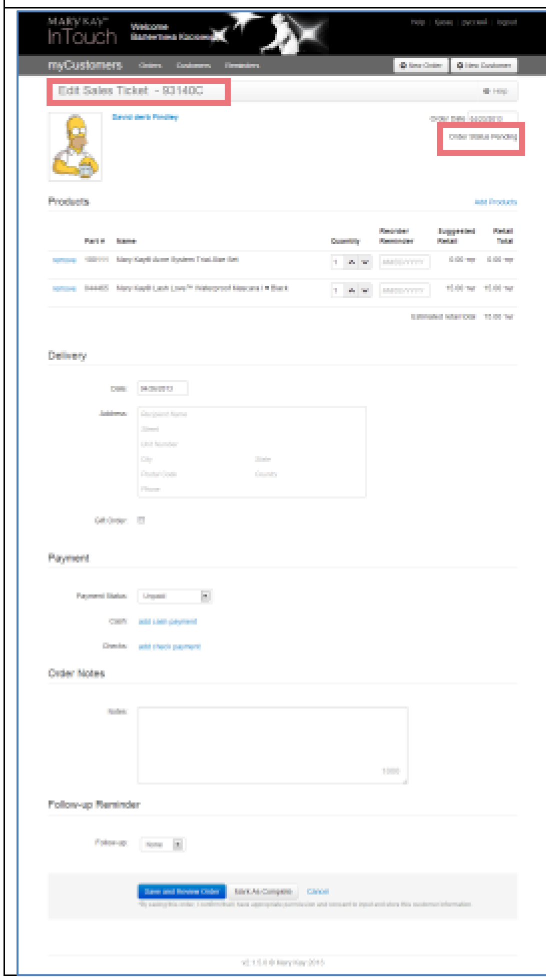


The **Edit Sales Ticket** page opens.

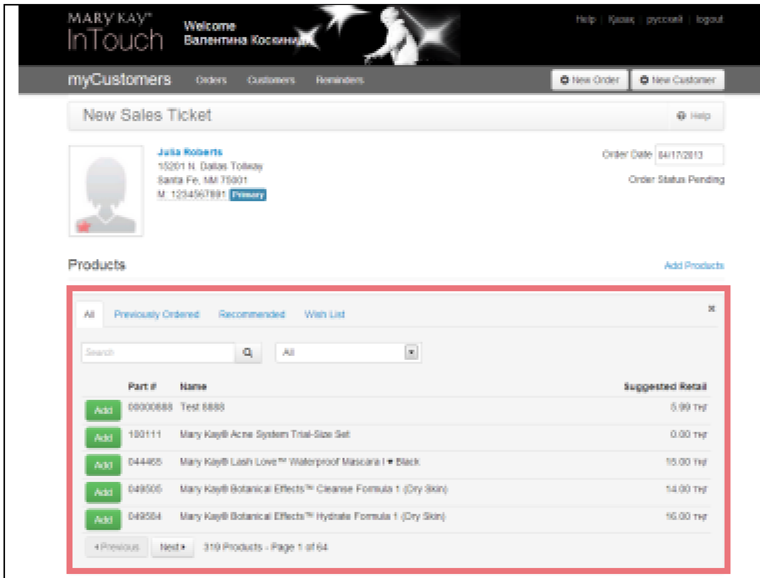
Until the order is marked complete, it remains in a **Pending** status. The **Pending** status means that the order is not complete.

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**.

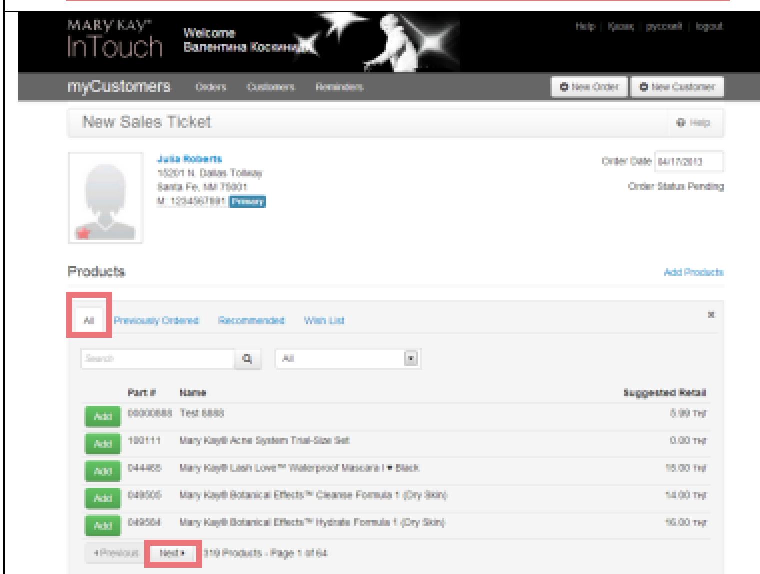
Note: The order can be reopened and edited at any time.

How to Add Products to an Order



It may be necessary to add additional products to the order. To add products to an existing order, click the **Add Products** link.

The **Products** section opens.

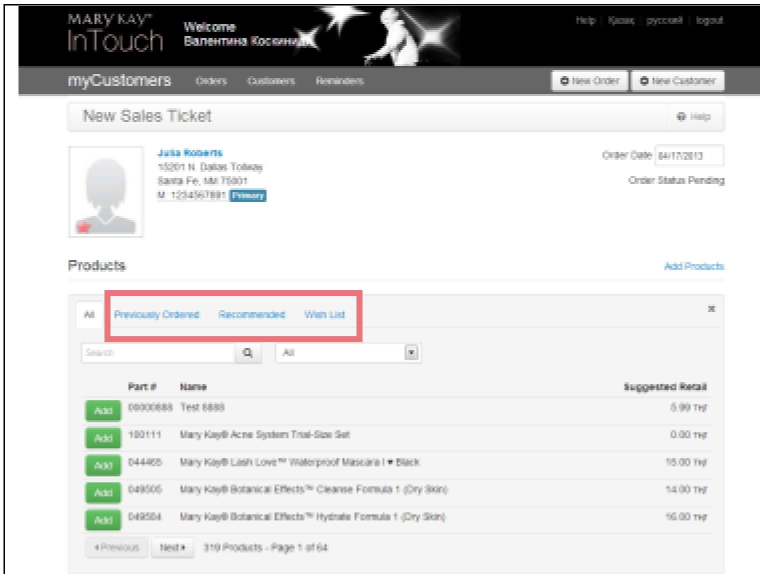
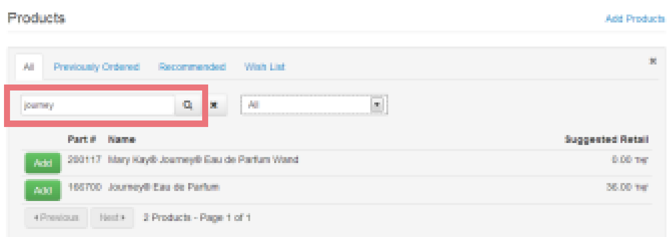
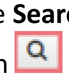
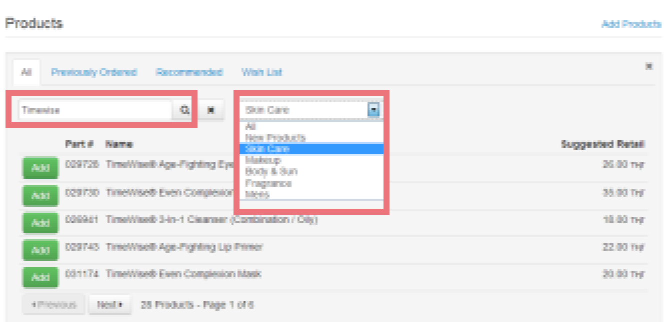


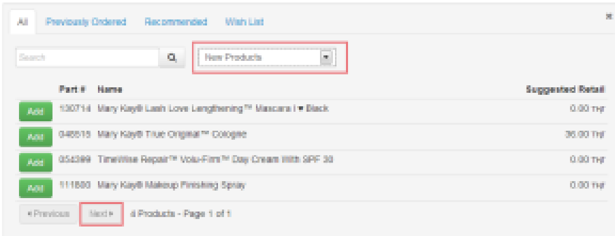
Products can be added using several methods such as

- 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**

All is the default view.

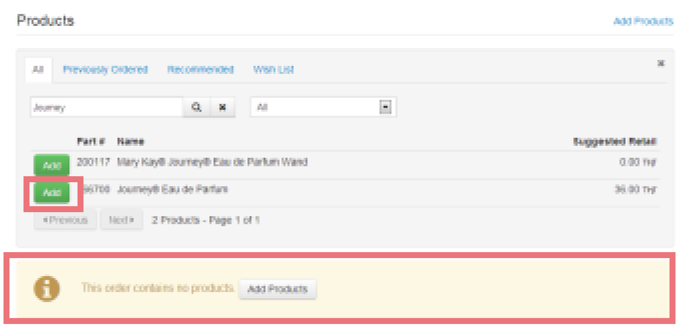
When you locate the product you need, click **ADD** to add the product to the order.

	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.
	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. Click **ADD** to add the product to the order.
	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.



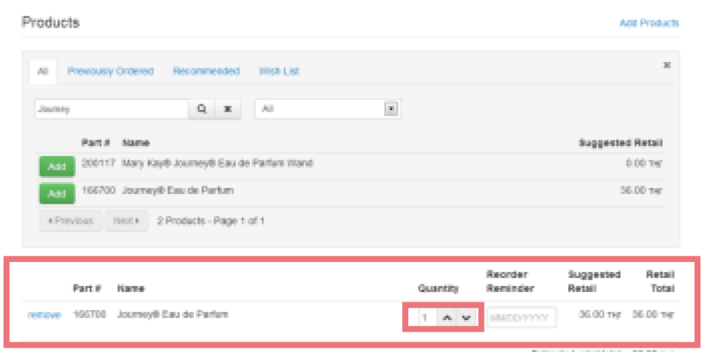
The **Category Filter** can be used alone to view a specific category of products. Click the down arrow to view the drop-down menu. Select a category. Products in the selected category are automatically displayed.

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.



Once you have located the product, click **Add** to add the product to the order.

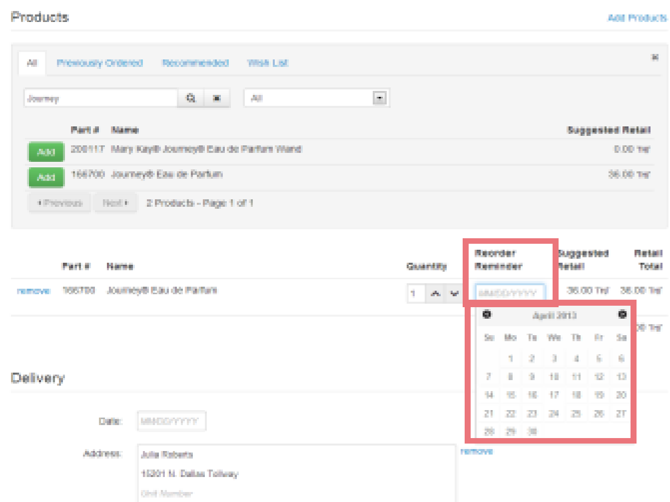
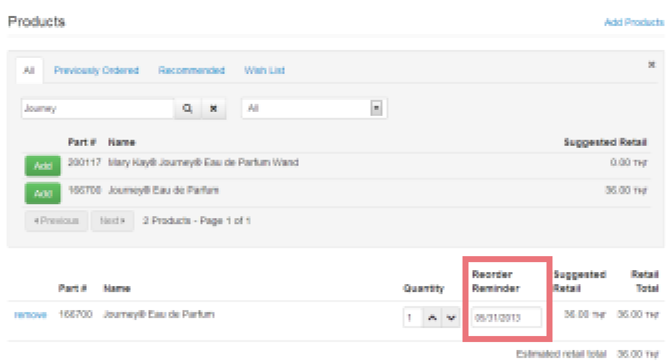
When a product is added the **Add Products** (yellow bar) below will disappear.



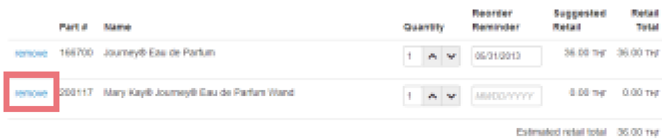
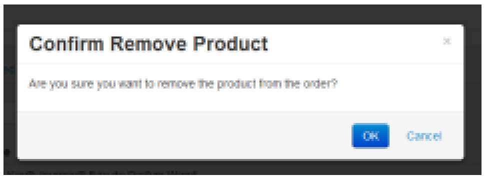
The **Add Products** bar is replaced with the product you added.

Update the quantity by clicking the up or down arrows beside the **Quantity** field.

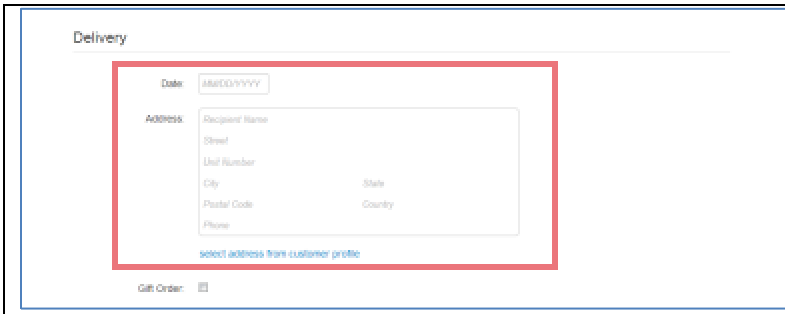
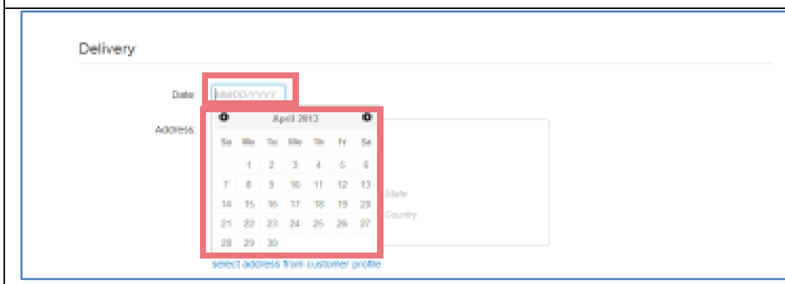
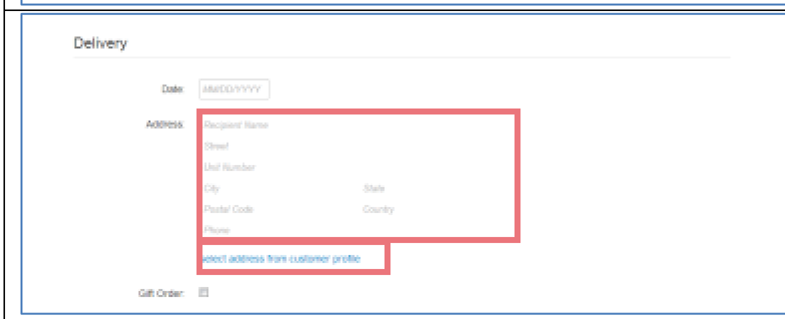
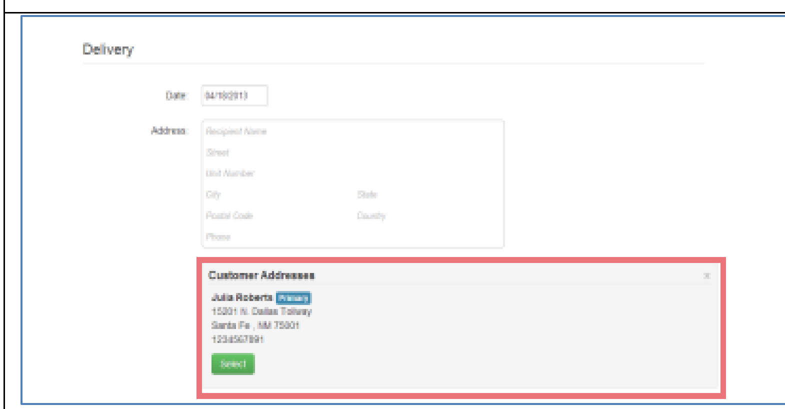
Adding a Reorder Reminder

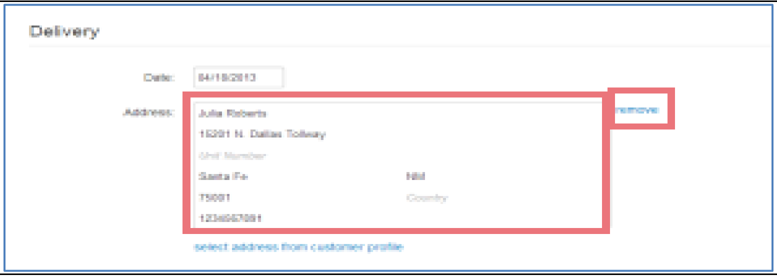
	Add a reorder reminder. Click inside the **Reorder Reminder** field. A calendar displays. Select the date for the reorder reminder to be generated. To choose a different month, use the arrows at the top of the calendar to move between months.
	The **Reorder Reminder** field is automatically updated with the date you selected.

Remove a Product

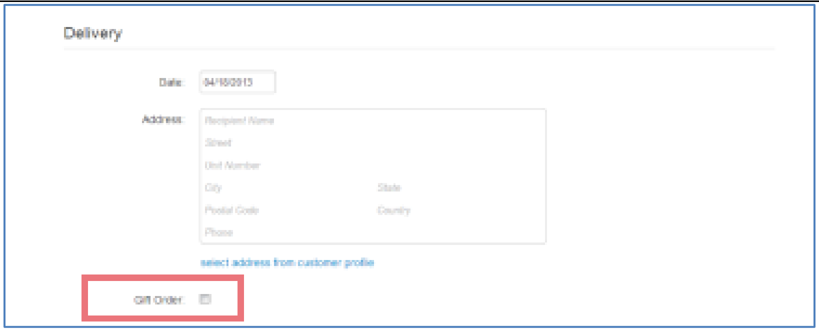
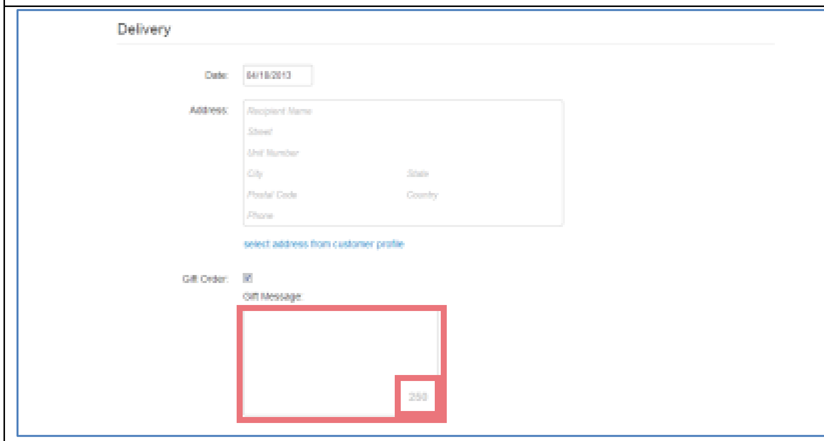
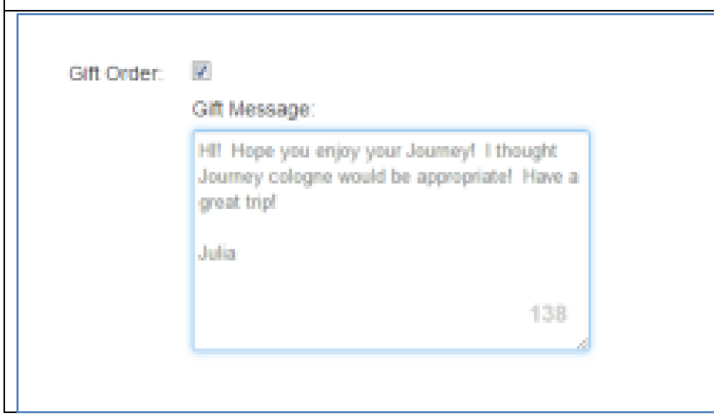
	Remove a product by clicking **Remove** beside the product you want to remove.
	A confirmation screen displays. Click **Ok** to remove the product. Click **Cancel** if you do not want to remove the product.

How to Deliver to Another Address

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

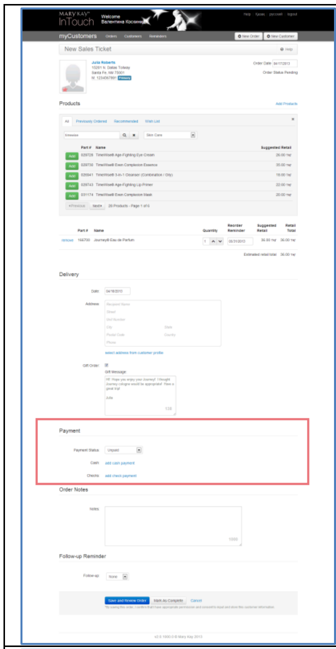
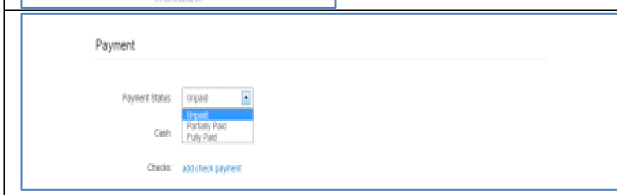
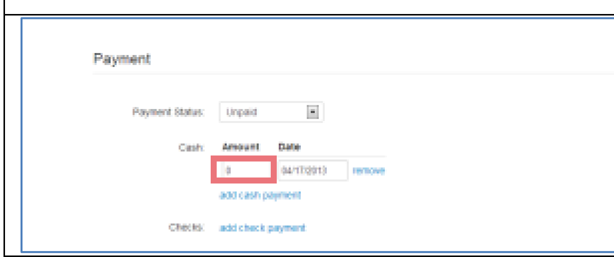
 	The address is added after you have clicked **Select**. To remove the address, click **Remove**.

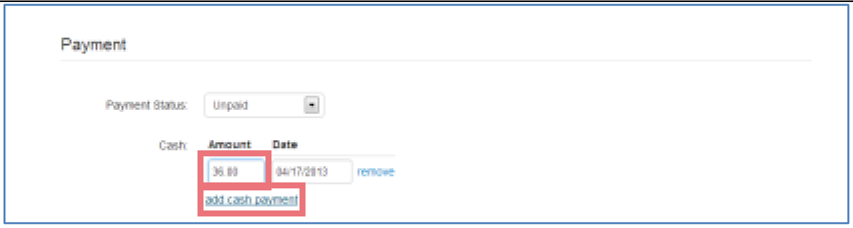
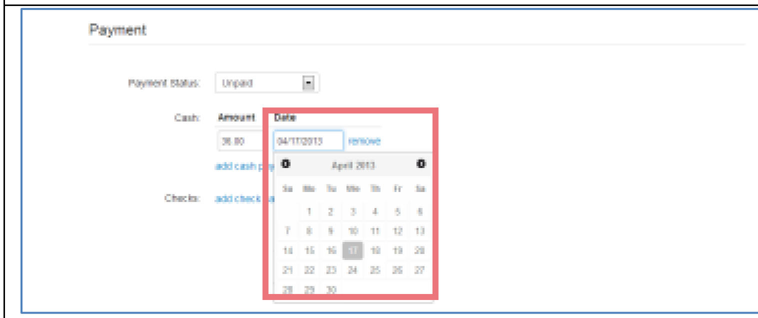
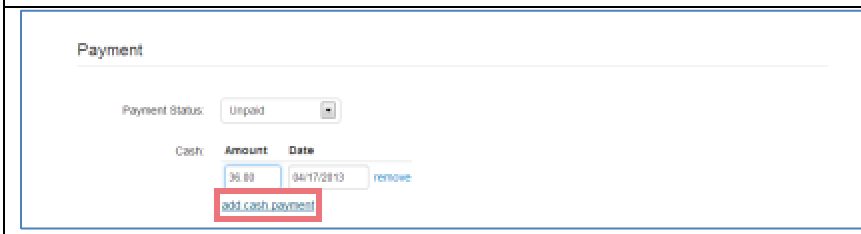
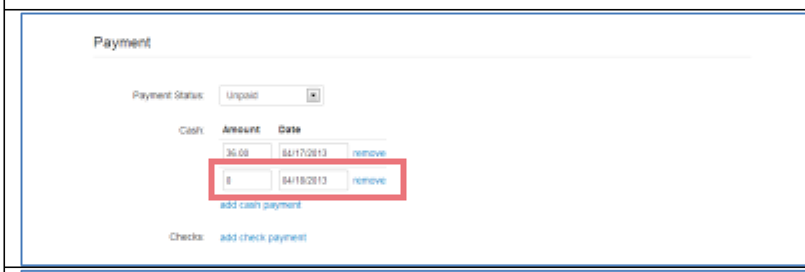
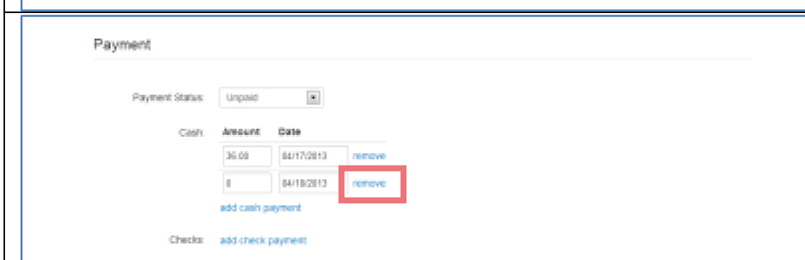
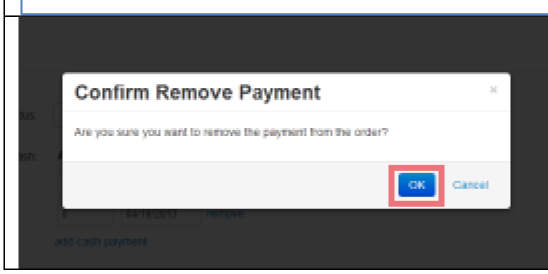
How to Add a Note for a Gift

	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.

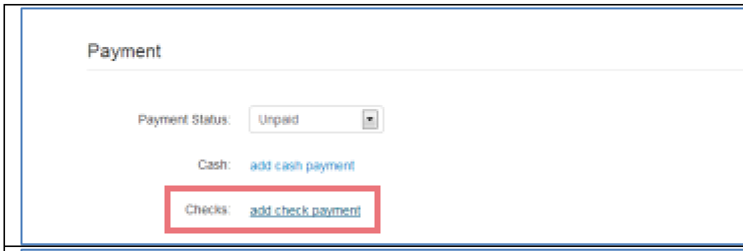
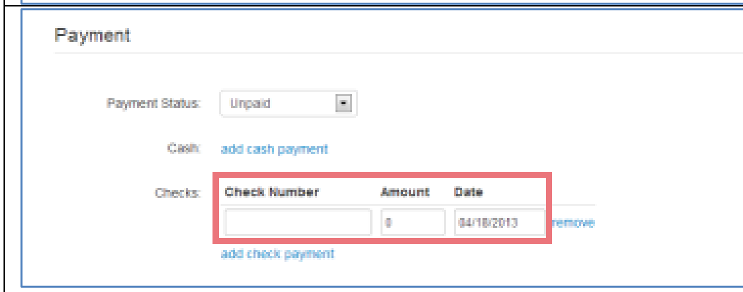
How to Add a Cash or Check Payment for an Order

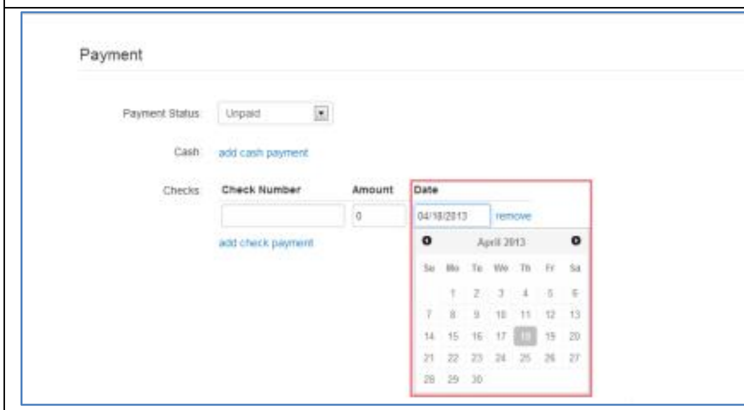
Cash Payment

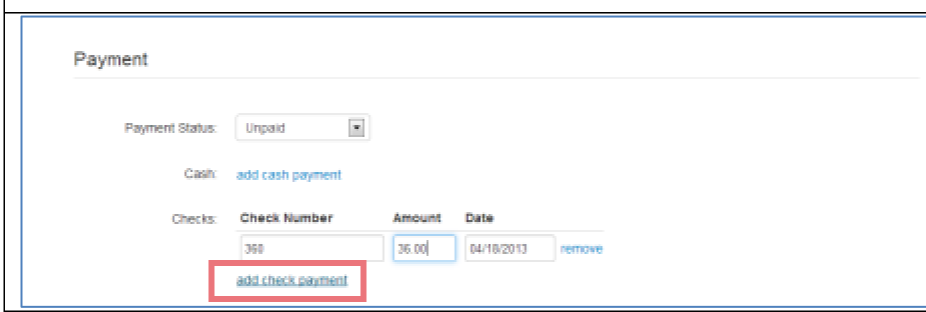
	To enter a payment for an order, go to the **Payment** section of the **New Sales Ticket** page.
	There are 2 payment statuses, **Partially Paid** and **Fully Paid**. Choose the payment status from the **Payment Status** drop-down menu.
	There are 2 methods of payment, **Check** and **Cash**. A customer 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.

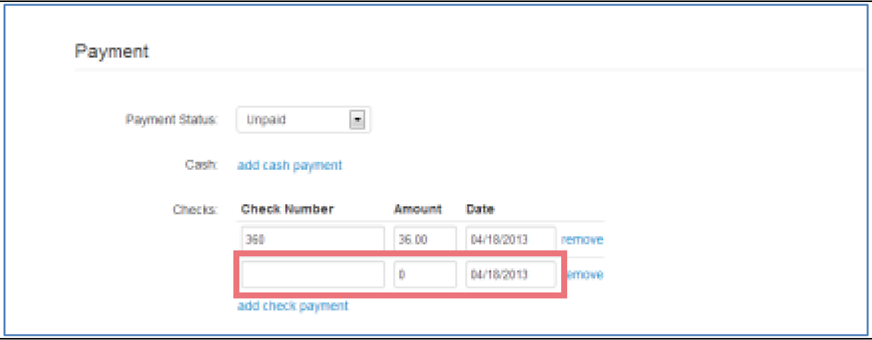
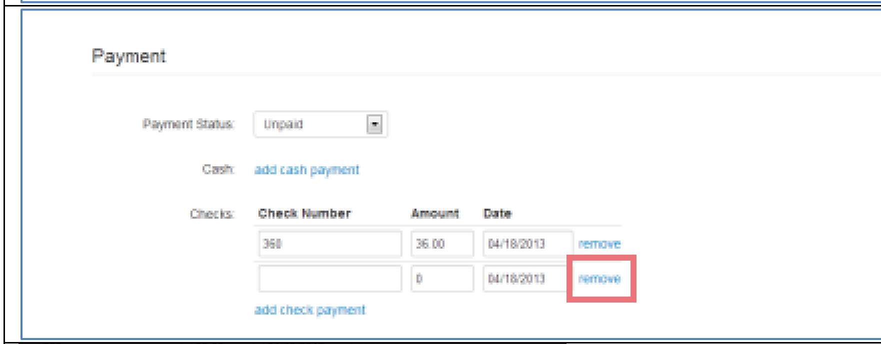
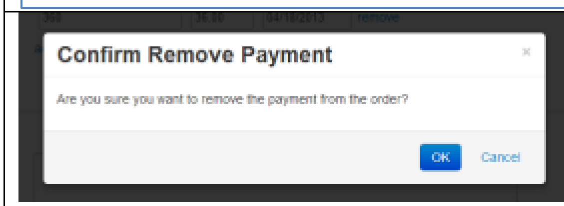
	Enter the amount of the order or a partial payment in the **Amount** field.
	For your convenience the current date is displayed in the **Date** field. To change the date, click inside the **Date** field. A calendar automatically displays. Choose the correct date. The date is immediately displayed in the **Date** field.
	When you have completed entering the payment click the link, "add cash payment."
	A second set of fields open to enter any additional payments.
	To remove a payment, click **Remove**.
	A confirmation screen displays. Click **OK** to continue and remove the payment. Click **Cancel** if you choose not to remove the payment.

Check Payment

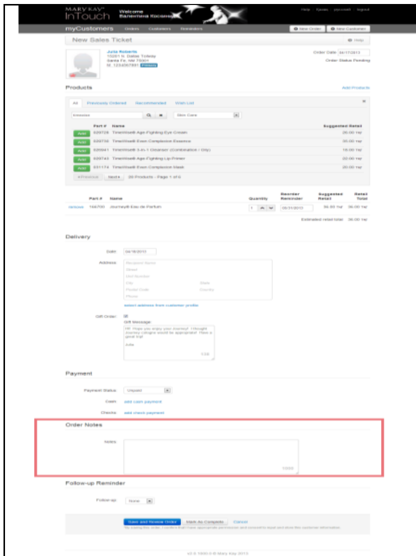
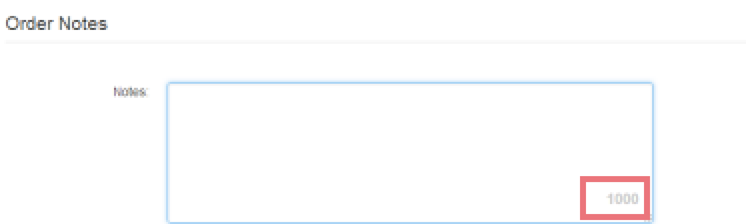
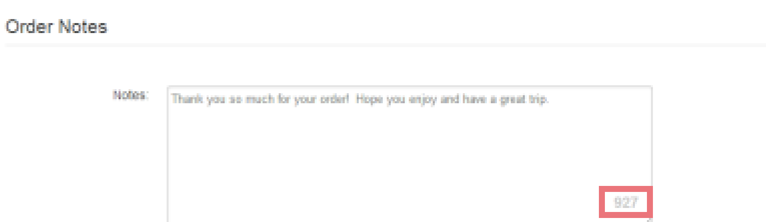
<table>
<tr>
<td>
</td>
<td>To enter a payment by check, click the link, “add check payment.”</td>
</tr>
<tr>
<td>
</td>
<td>The Check Number, Amount and Date fields are displayed.

Enter the check number and amount in the appropriate fields.</td>
</tr>
<tr>
<td>
</td>
<td>For your convenience the current date is displayed in the Date field.

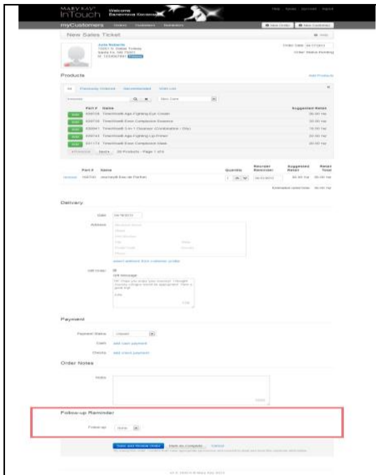
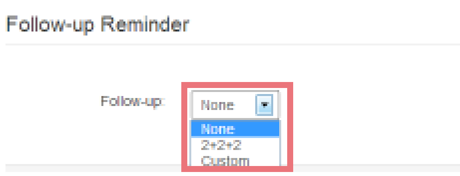
To change the date click inside the Date field. A calendar automatically displays. Choose the correct date. The date is immediately displayed in the Date field.</td>
</tr>
<tr>
<td>
</td>
<td>After the payment information has been entered, click the link, “add check payment.”</td>
</tr>
</table>

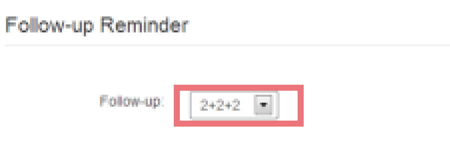
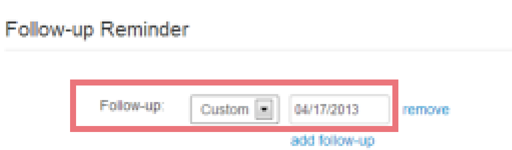
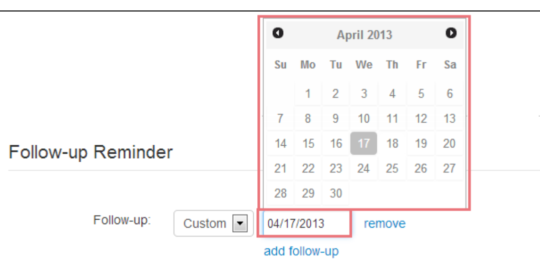
<table>
<tr>
<td>
</td>
<td>A second set of fields open to enter any additional payments.</td>
</tr>
<tr>
<td>
</td>
<td>To remove a payment, click Remove.</td>
</tr>
<tr>
<td>
</td>
<td>A confirmation screen displays. Click OK to continue and remove the payment. Click Cancel if you choose not to remove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

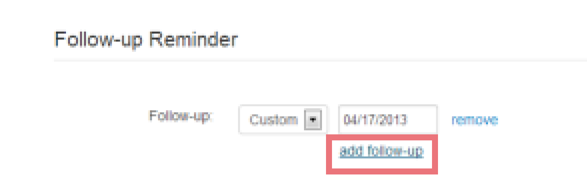
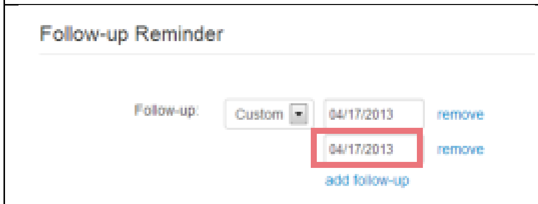
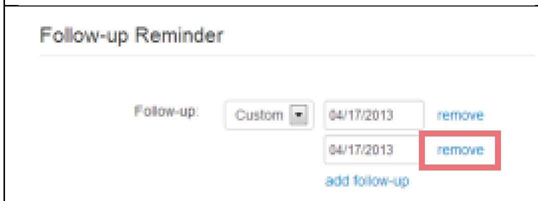
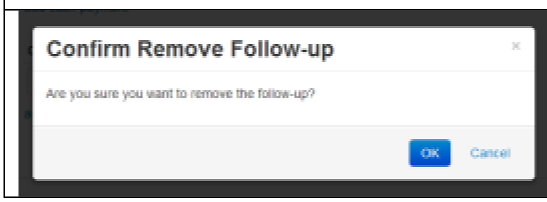
How to Add Notes to an Order

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

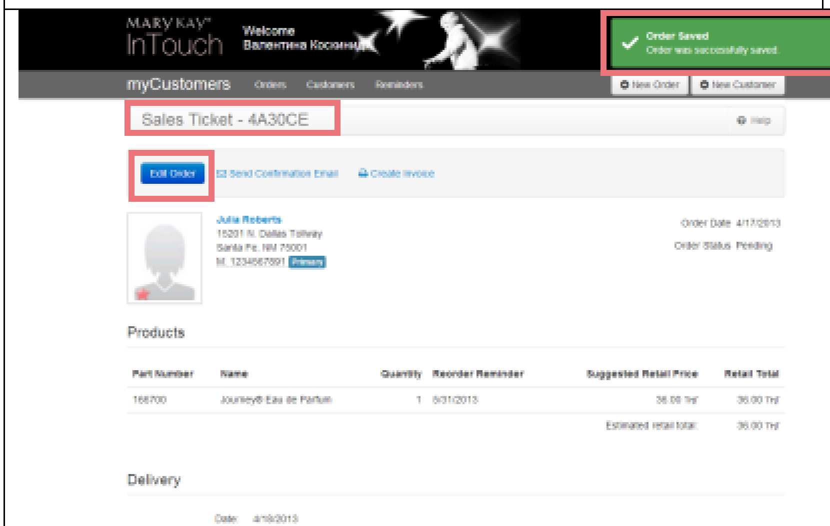
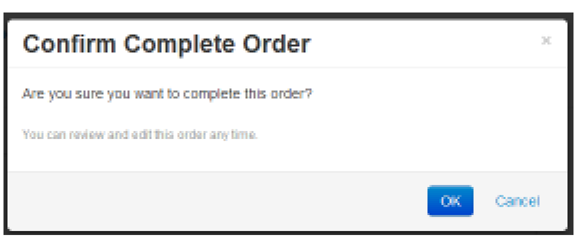
How to Add a Follow-Up Reminder

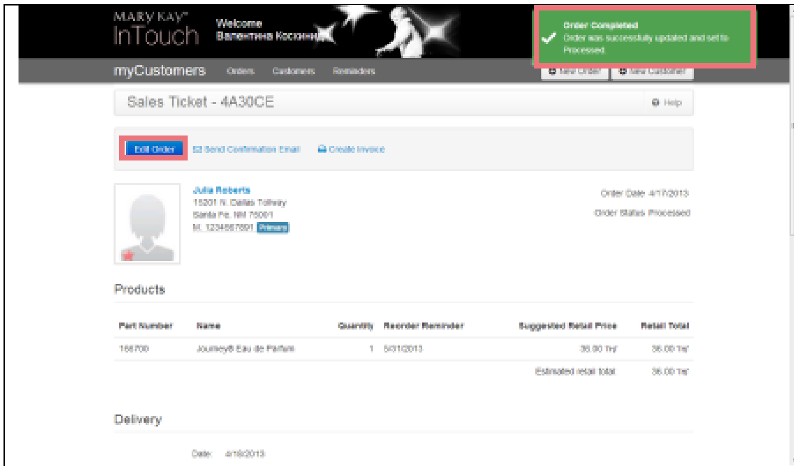
<table>
<tr><td></td><td>Setup a Follow-Up Reminder to help you to remember when to follow up with your customer concerning her product purchase.</td></tr>
<tr><td>
</td><td>Follow-up reminder options are None, 2+2+2 and Custom.

Click the down arrow to select the follow-up option.</td></tr>
<tr><td>
</td><td>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.</td></tr>
<tr><td>
</td><td>To setup a custom follow-up reminder, select the Custom option. A date field opens with the current date.</td></tr>
<tr><td>
</td><td>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.</td></tr>
</table>

	To add another follow-up reminder, click the link, **“add follow-up.”**
	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..
	To remove a follow-up reminder, click **Remove**.
	A confirmation screen displays. To remove the reminder, click **Ok**. If you choose not to remove the reminder, click **Cancel**.

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.

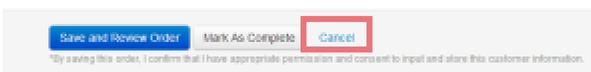


A confirmation displays on the **Review Order** page confirming the order was successfully completed.

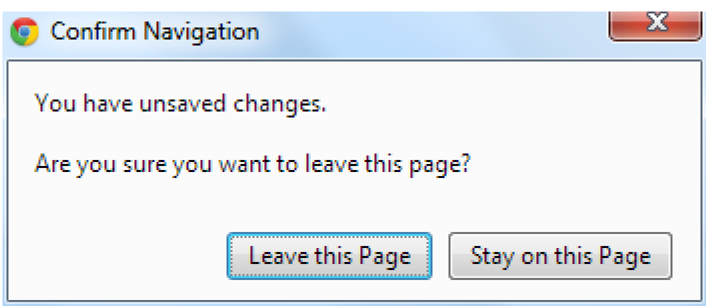
An **Order Number** is assigned to the order.

The status has been changed from **Pending** to **Processed.**

To reopen the order and make changes, click the **Edit Order** button.

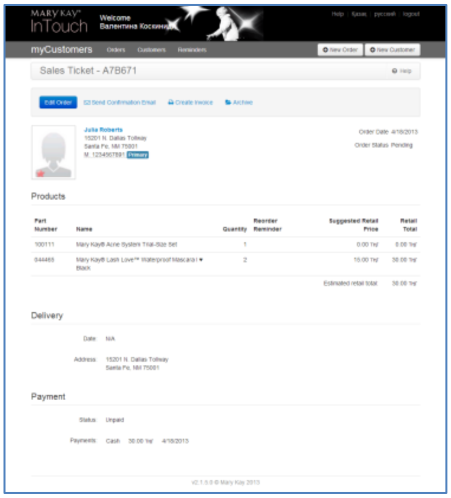


To cancel the order, click **Cancel**.



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**.

How to Review An Order



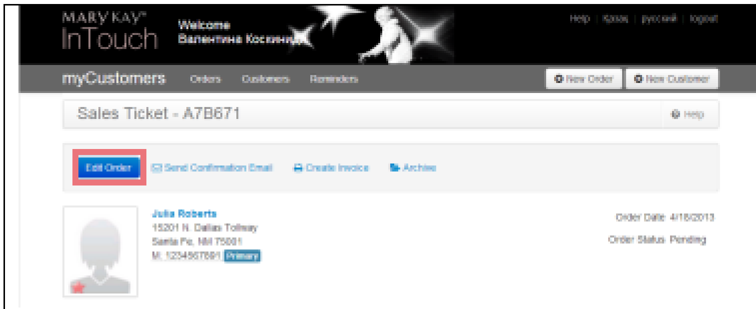
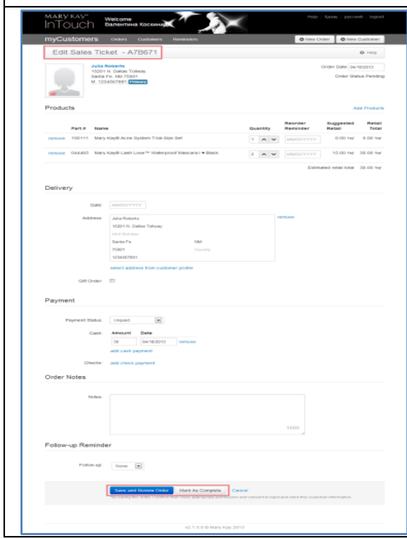
Clicking **Save and Review** or **Mark as Complete** opens the **Review Order** page.

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

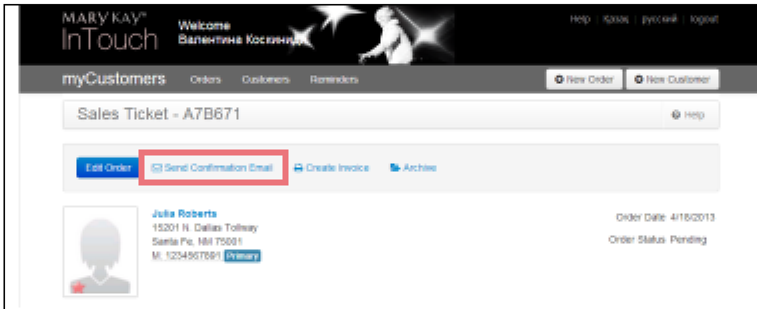
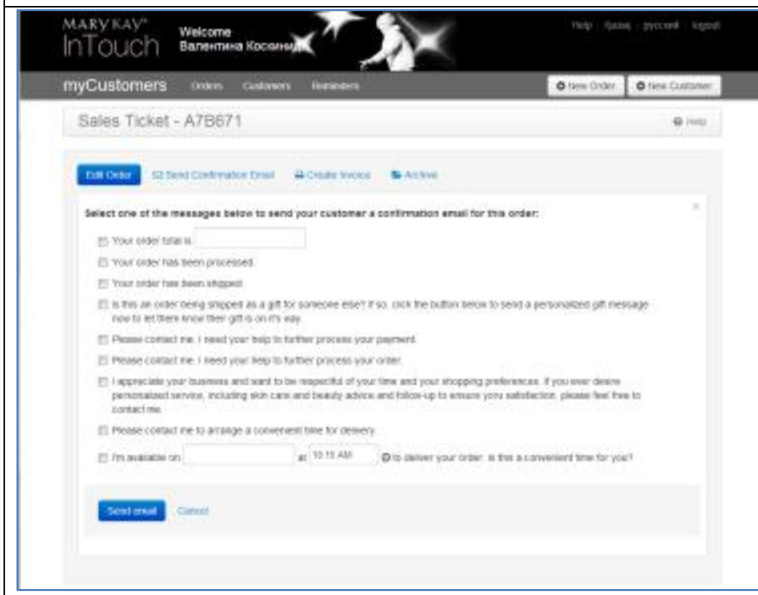
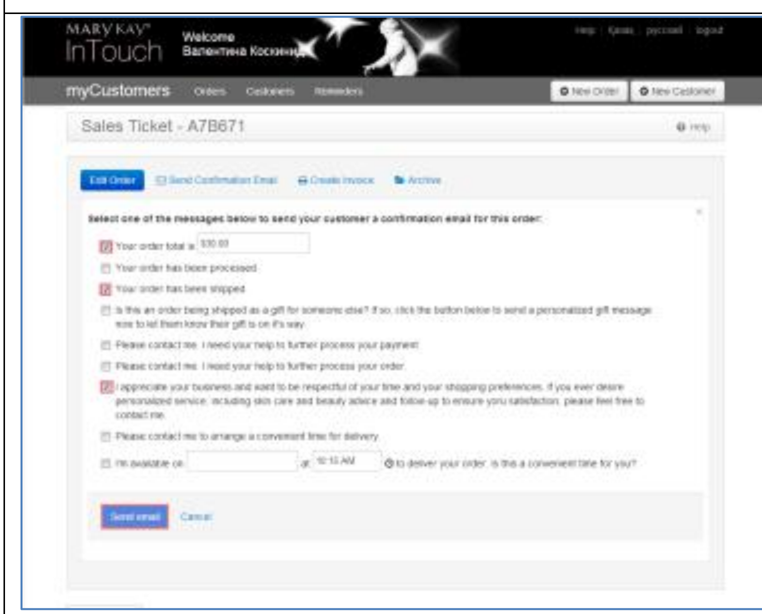
If the **Save and Review** button was used, the status on the **Review Order** page is **Pending**.

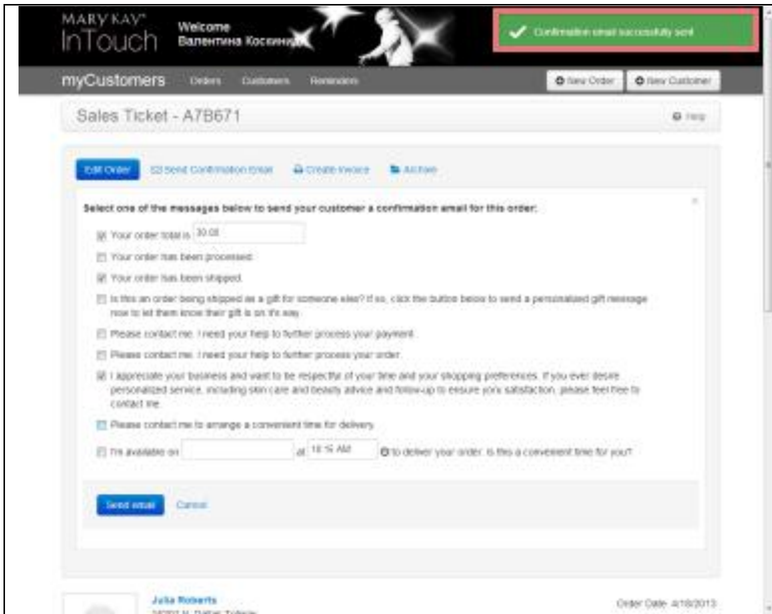
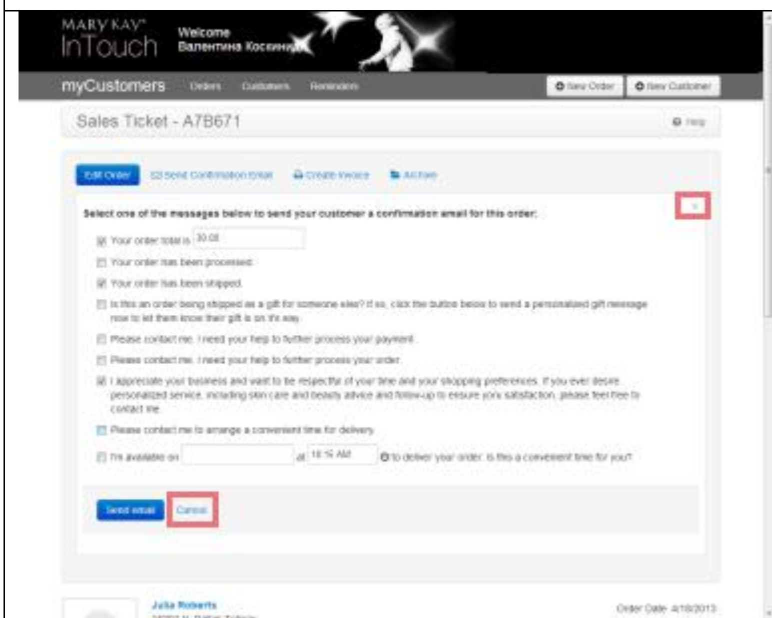
If the **Mark as Complete** button was used, the status on the **Review Order** page is **Processed**.

How to Make Changes to an Order

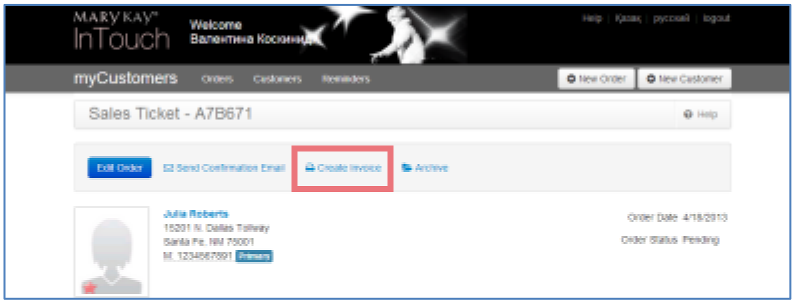
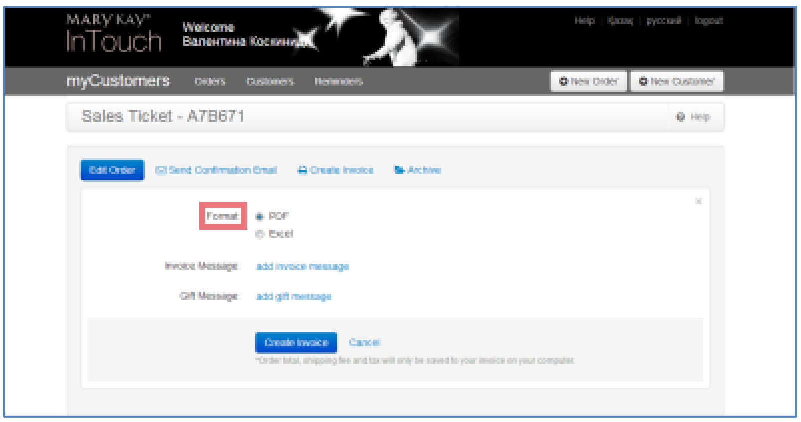
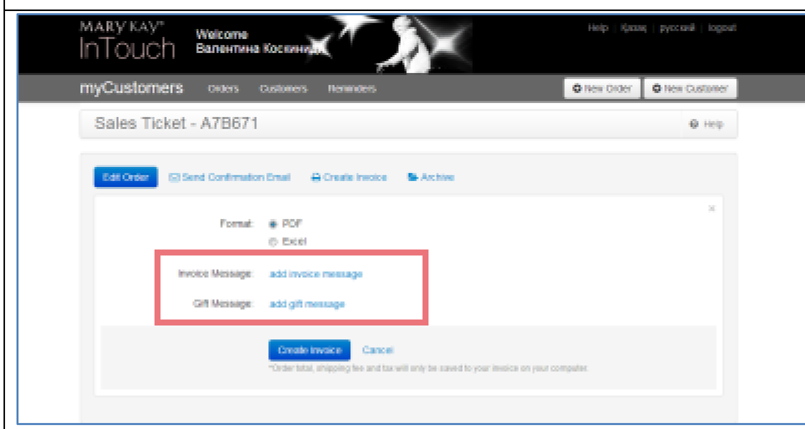
	Click **Edit Order** to make changes to the order.
	The **Edit Sales Ticket** page opens. Once you are finished making changes, click the **Save and Review** or **Mark as Complete** button to save your changes and go to the **Review Order** screen.

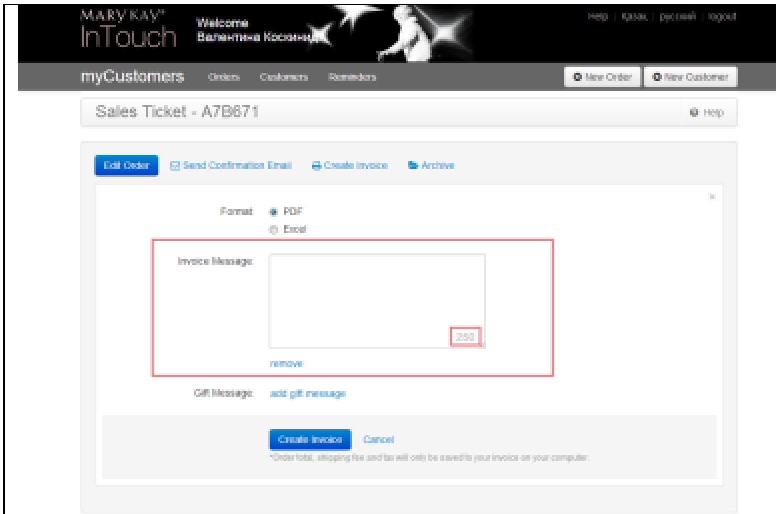
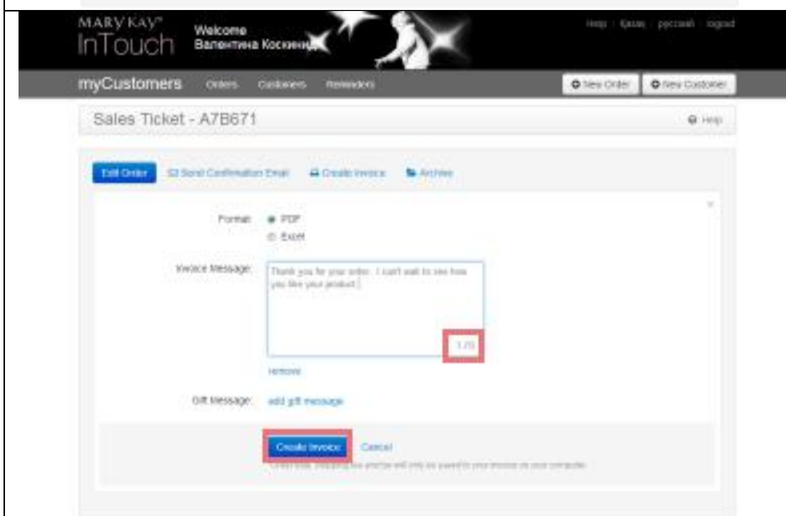
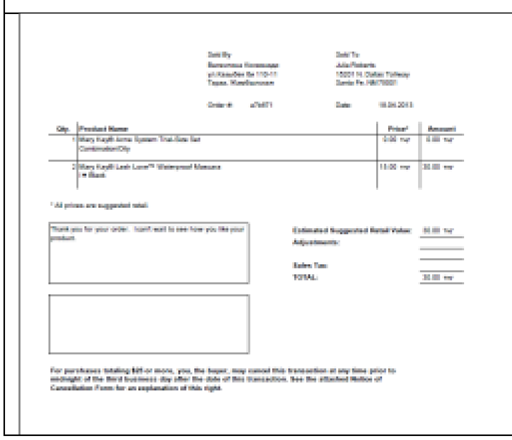
How to Send a Confirmation Email

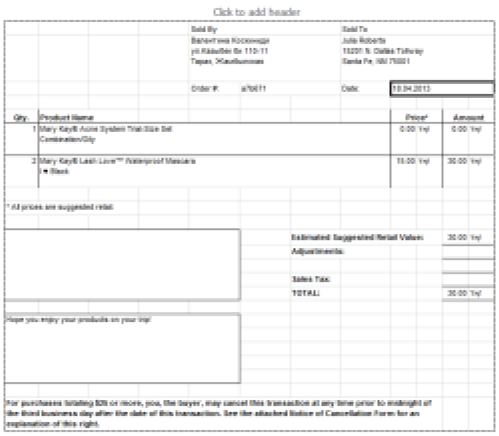
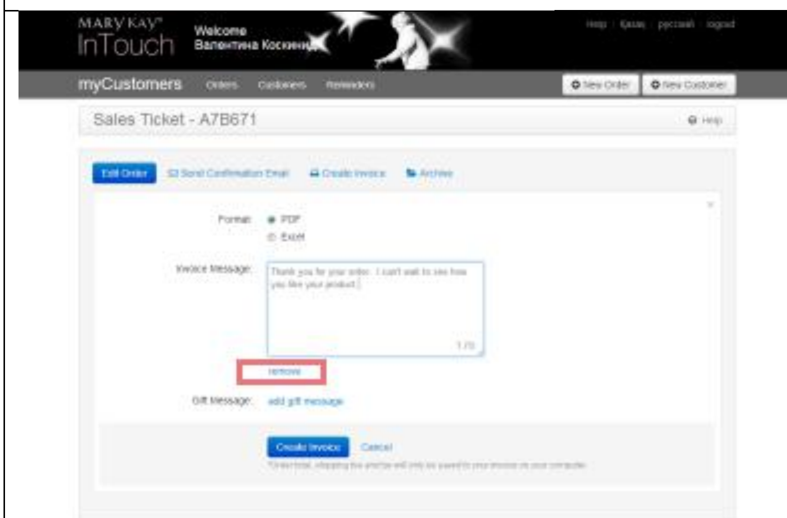
	It's easy to let the customer know the status of her order or that you need additional information. Click **Send Confirmation Email** to send an email to the customer.
	The **Confirmation Email** screen displays. Click the **checkbox** to select one or more of the messages to be included in the confirmation email.
	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

	To create an invoice for the order, click **Create Invoice**.
	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 *will not* be editable. Choose the **radio** button beside the format you wish to use.
	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.

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

	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

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.

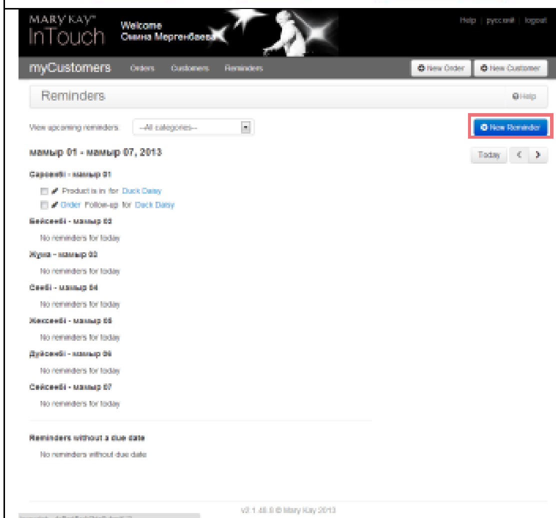
You can,

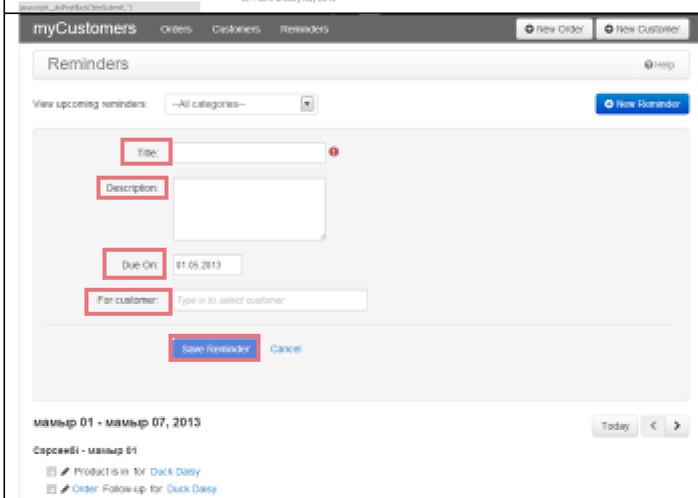
- Add a reminder
- Edit a reminder
- Close or complete a reminder
- Sort reminders with the filter
- Viewing reminders

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

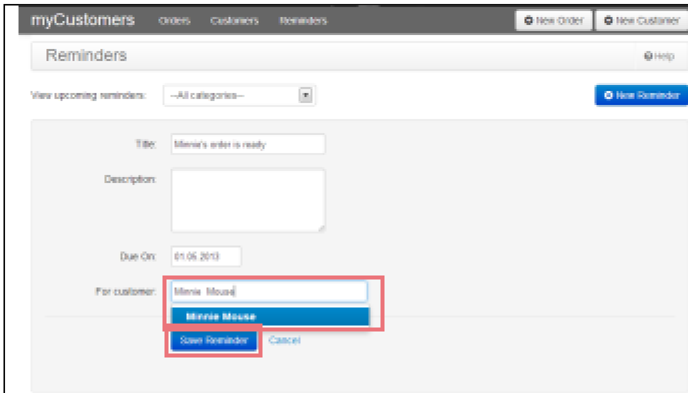
Reminders is also on the **Navigation Bar** so you can open the **Reminders** section regardless of where you are in myCustomers.

How to Add a Reminder

<table>
<tr>
<td>
</td>
<td>Open Reminders from the Navigation Bar or from the Home page.</td>
</tr>
<tr>
<td>
</td>
<td>The current week of reminders is shown on by default.

To add a new reminder, click the New Reminder button.</td>
</tr>
<tr>
<td>
</td>
<td>The following fields display,

• 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?</td>
</tr>
</table>

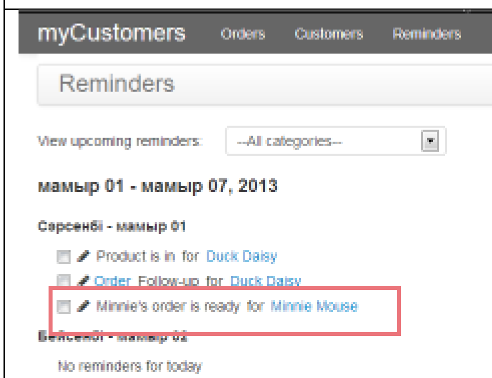


Enter information in the various fields.

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

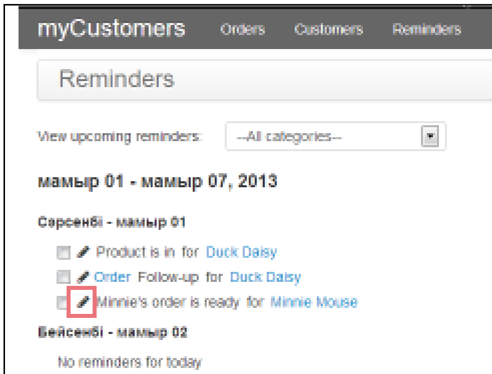
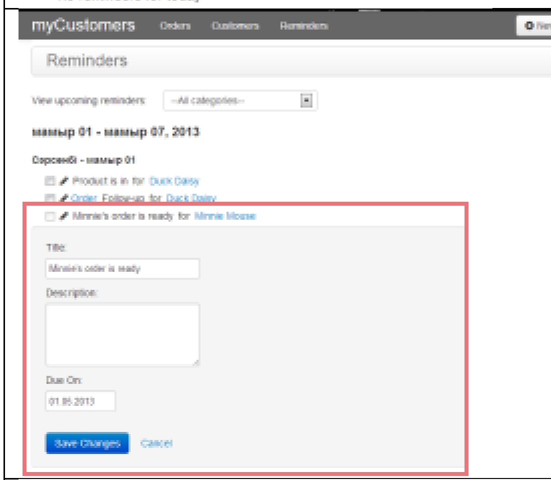
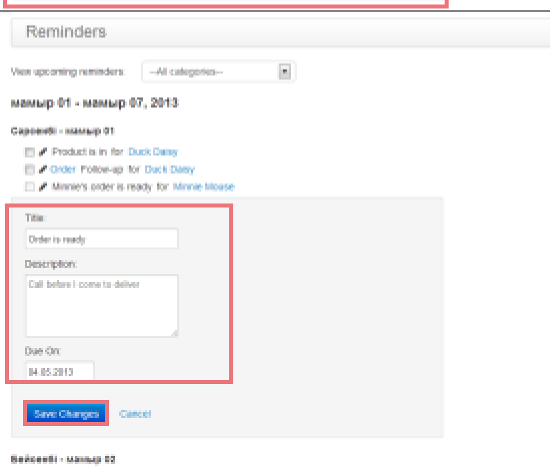
As you enter the customer's name in the **For Customer** field the system will automatically create a list of customers with that name. Instead of continuing to enter the name, just select your customer from the list!

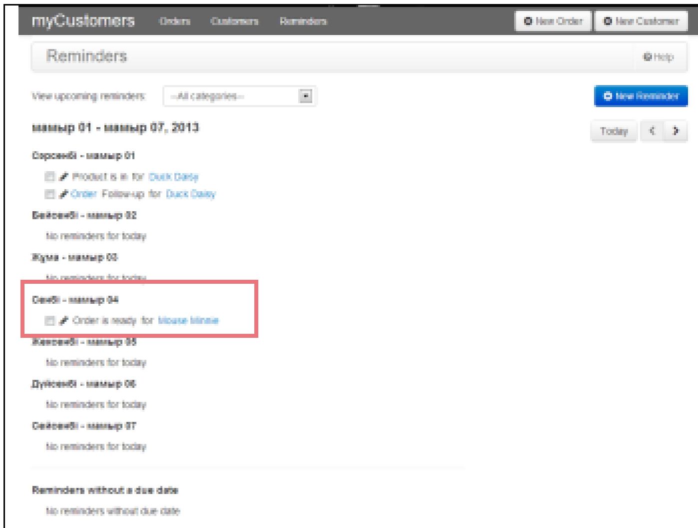
Once all of the information has been entered, click the **Save Reminder** button.



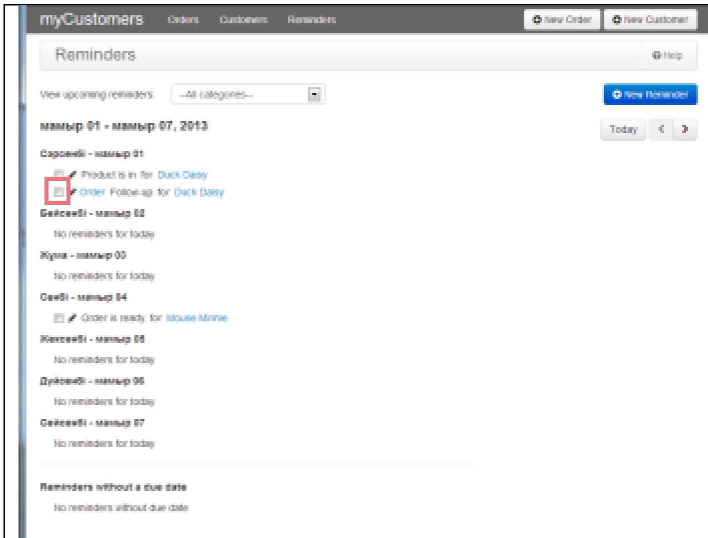
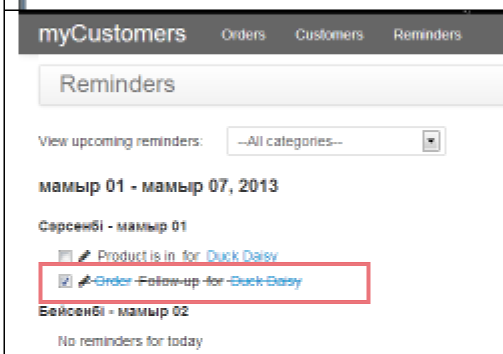
The reminder is saved and because our reminder was created for today, it is displaying under today's reminders.

How to Edit a Reminder

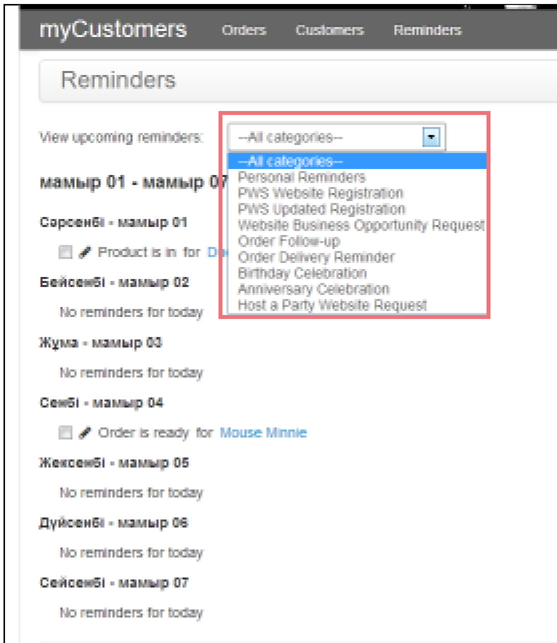
	Once a reminder has been created you may need to make changes to it. To edit a reminder, click the **Pencil** icon located beside the reminder.
	Editable fields are displayed below the reminder you are editing.
	Once your changes are complete, click the **Save Changes** button to complete the change.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

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

How to Close or Complete a Reminder

	To close or complete a reminder, click the checkbox beside the reminder.
	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

How to Sort Reminders



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

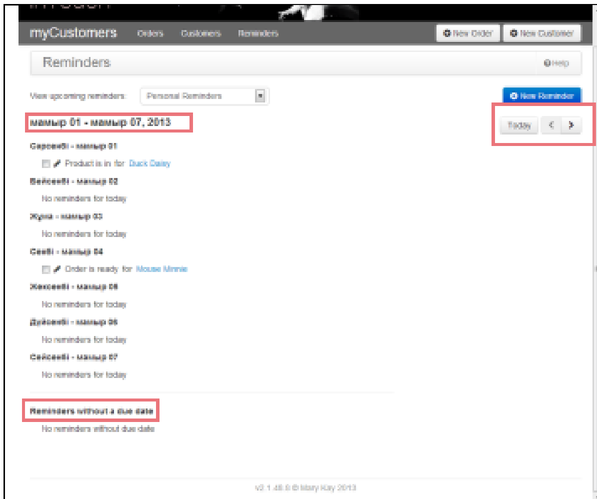
Another way to view reminders is to use the **View Upcoming Reminders** filter to sort reminders using pre-defined categories.

Click the arrow to view the drop-down menu.

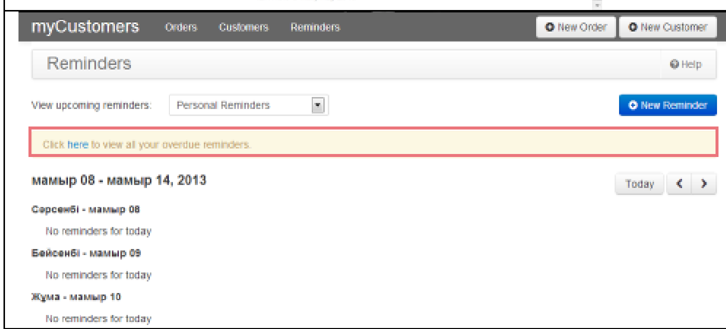
Select the category.

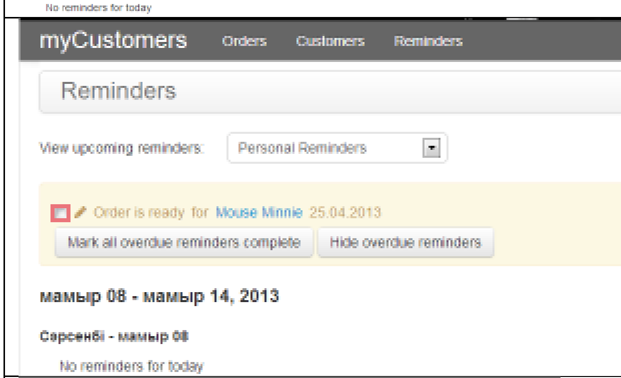
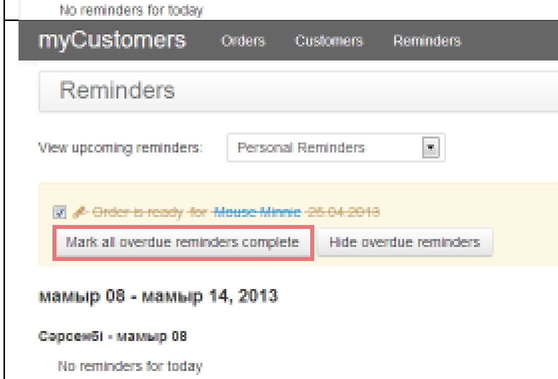
All reminders that correspond to the selected category are displayed.

How to View Reminders

<table>
<tr>
<td>
</td>
<td>Reminders by default, are displayed a week at a time.

Use the scroll buttons to move between weeks.

Reminders created without a due date are located in the Reminders Without a Due Date section located below the weekly reminders.</td>
</tr>
<tr>
<td>
</td>
<td>A reminder for any overdue reminders that have not been marked as closed is displayed as a yellow bar.

To view the overdue reminders, click the Here link.</td>
</tr>
<tr>
<td>
</td>
<td>All overdue reminders are displayed.</td>
</tr>
<tr>
<td>
</td>
<td>A line is drawn through the reminder to indicate it will be removed.

Click the Mark all overdue reminders complete button to remove the reminder.

To close the Overdue Reminder bar, without removing a reminder, click Hide Overdue reminders.</td>
</tr>
</table>