# *Customer* MANAGEMENT KEY

**L'BRI** PURE n' NATURAL
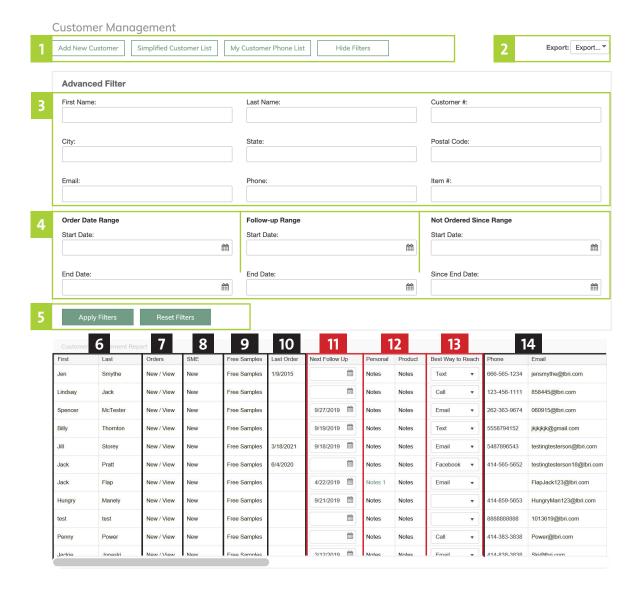
▶ **The Customer Management Tool is located within your Business Center, under the Business Tab, click on Customer Management in the list.**

## Customer Management

**1** | Add New Customer | Simplified Customer List | My Customer Phone List | Hide Filters

**2** | Export: | Export... ▾

### Advanced Filter

**3**

First Name:

Last Name:

Customer #:

City:

State:

Postal Code:

Email:

Phone:

Item #:

**4**

**Order Date Range**
Start Date:

**Follow-up Range**
Start Date:

**Not Ordered Since Range**
Start Date:

End Date:

End Date:

Since End Date:

**5** | Apply Filters | Reset Filters

Customer Management Report

| **6** First | **7** Last | Orders | **8** SME | **9** Free Samples | **10** Last Order | **11** Next Follow Up | **12** Personal | Product | **13** Best Way to Reach | **14** Phone | Email |
|---|---|---|---|---|---|---|---|---|---|---|---|
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| | | | | | | |
|---|---|---|---|---|---|---|
| MUKWONAGO | WI | 123 Nothing St | | 53149 | 8/19/2015 | 836900 |
| BEVERLY HILLS | CA | 123 Scare Avenue | | 90210 | 10/30/2015 | 849523 |
| BEVERLY HILLS | CA | street1 | | 90210 | 11/2/2015 | 849964 |
| BEVERLY HILLS | CA | dsfsd | | 90210 | 11/2/2015 | 849967 |
| BEVERLY HILLS | CA | street1 | | 90210 | 11/3/2015 | 850192 |
| BEVERLY HILLS | CA | street1 | | 90210 | 11/3/2015 | 850193 |
| BEVERLY HILLS | CA | street2 | | 90210 | 11/3/2015 | 850196 |
| MUKWONAGO | WI | 123 MAIN ST | | 53149- | 12/29/2015 | 858759 |
| WATERFORD | WI | S21 W283 Oak Dr | | 53185 | 1/4/2016 | 859263 |
| MUKWONAGO | WI | 1234 Perkins Dr | | 53149 | 1/6/2016 | 859396 |
| EAST TROY | WI | 123 Main | | 53120 | 2/15/2016 | 865520 |

**1**  **ADD NEW CUSTOMER, SIMPLIFIED CUSTOMER LIST, MY CUSTOMER PHONE LIST, HIDE FILTERS**

Click "Add New Customer" to add a new Customer to your L'BRI Business. Click "Simplified Customer List" to see a list of your customers, their last order information and their contact information. Click "My Customer Phone List" to see all your customer's first names, last names and phone numbers only. The Simplified Customer List and My Customer Phone list is printable. Click "Hide Filters" to move the filters out of sight.

**2**  **EXPORT**

Export your entire customer list in CSV (comma separated values format), which you can open in spreadsheet software such as Excel.

**3**  **SEARCH FIELDS BY ENTERING TEXT**

Search your customers by entering text in one or more fields. Type in a name, city, state, postal code, email address, phone number or product item number. Click "Apply Filter" to run search.

**4**  **SEARCH FIELDS BY ENTERING A DATE RANGE**

Search your customers by choosing from three date ranges. 1, Start Order Date and End Order Date. 2, Follow up Start Date and Follow up End Date. 3, Not Ordered Since Start Date and Not Ordered Since End Date. These three searches allow you to view your customers based on when they ordered, when you're scheduled to follow up with them, and view customers who have not ordered within a given date range.

**5**  **APPLY FILTERS AND RESET FILTERS**

Click "Apply Filters" to run a search on information you entered in the text fields. Click "Reset Filters" to clear all filters.

# CUSTOMER MANAGEMENT REPORT COLUMNS

**6  FIRST AND LAST NAME**

Your customer's first and last name will appear here. Click on either the customer's first or last name to edit your customer's profile. You can edit all aspects of your customer's profile except their password.

**7  ORDERS**

Click on "New" to place a new order for your customer, you do not need the customer's password to place their order. Click on "View" to view your customer's past order history.

**8  SME (SAMPLING MADE EASY)**

Here you can send samples using Sampling Made Easy.

**9  FREE SAMPLES**

Here you can order free sample sets for your customers.

**10  LAST ORDER**

In this column the last order date will appear. If this column is blank for any customer, this means your customer has not placed their first order yet, was transferred to your customer list or has not ordered since December 31, 2014.

**11  NEXT FOLLOW UP**

Enter a future date to follow up with your customer. Type in a date or click the calendar icon to select a date. The Next Follow Up date will vary, however you want to be sure you initially contact a new customer within the first 7–10 days of ordering.

**12  PERSONAL NOTES AND PRODUCT NOTES**

Use Personal and Product notes to enter information you gathered on the Client Profile & Game Card[1] or after you connect with your customer. Click on "Personal" note to enter personal information about your customer, for example her occupation, if she has children, or what she would do with extra income each month. Click on "Product" note to enter information about her skin, how her skin has responded to L'BRI, and if she has any skin care concerns. Tip: when you enter a new note, type a short message in the subject field to see all your notes at a glance. You can provide more details in the message box.

**13  BEST WAY TO REACH**

This column has a dropdown option that allows you to choose your customer's preferred method of contact. Choose from Text, Call, Email or Facebook. Please remember, the best way to reach is not the only way.

**14  CUSTOMER INFORMATION**

View your customer's phone number, email address, address, customer join date and customer identification number.

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[1] Client Profile & Game Card: New customer information form, located in the Learning Center.