



# Customer MANAGEMENT KEY

► The Customer Management Tool is located within your Business Center, under the Business Tab, just click on Customer Management in the list.

Customer Management

1

2
Export:

**Advanced Filter**

3

First Name:

City:

Email:

Last Name:

State:

Phone:

Customer #:

Postal Code:

Item #:

4

**Order Date Range**

Start Date:

End Date:

**Follow-up Range**

Start Date:

End Date:

**Not Ordered Since Range**

Start Date:

Since End Date:

5

Customer	6	7	8	9	10	11	12	13		
First	Last	Orders	Free Samples	Last Order	Next Follow Up	Personal	Product	Best Way to Reach	Phone	Email
Jessica	Meyer	New / View	Free Samples		<input type="text"/>	Notes 1	Notes	<input type="text"/>	2628576601	Meyerjess31@
Jo	White	New / View	Free Samples	11/6/2019	10/4/2019	Notes 1	Notes 6	Call	262-363-9674	devon@lbri.co
Doris	Newsby	New / View	Free Samples	8/10/2015	10/4/2019	Notes 1	Notes 1	Call	555-666-1234	deeneews@lbri.c
Joanne	Randall	New / View	Free Samples		9/12/2018	Notes 1	Notes 1	Call	896-564-8596	joanner@lbri.cc
Emily	Jahn	New / View	Free Samples	8/4/2015	9/29/2018	Notes	Notes	Call	122-456-7896	emily@lbri.com
Kathy	Wester	New / View	Free Samples	2/9/2015	10/1/2018	Notes	Notes	Call	123-456-7890	kathyw@lbri.co
Donald	McCracken	New / View	Free Samples	3/8/2019	11/2/2018	Notes	Notes	<input type="text"/>	262-363-9674	Donald@lbri.co
Freebird	Sherpard	New / View	Free Samples	11/18/2016	10/4/2018	Notes	Notes 1	<input type="text"/>	555-123-4444	boingboing@lb
Sally	White	New / View	Free Samples		10/22/2...	Notes	Notes	<input type="text"/>	1111111111...	



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 any 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 FREE SAMPLES

Here you can order free samples for your Customers.

### 9 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.

### 10 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.

### 11 PERSONAL NOTES AND PRODUCT NOTES

Use Personal and Product notes to enter information you gathered on the Client Profile & Game Card<sup>1</sup> 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 skincare 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.

### 12 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.

### 13 CUSTOMER INFORMATION

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

<sup>1</sup> Client Profile & Game Card: New customer information form, located in the Learning Center.