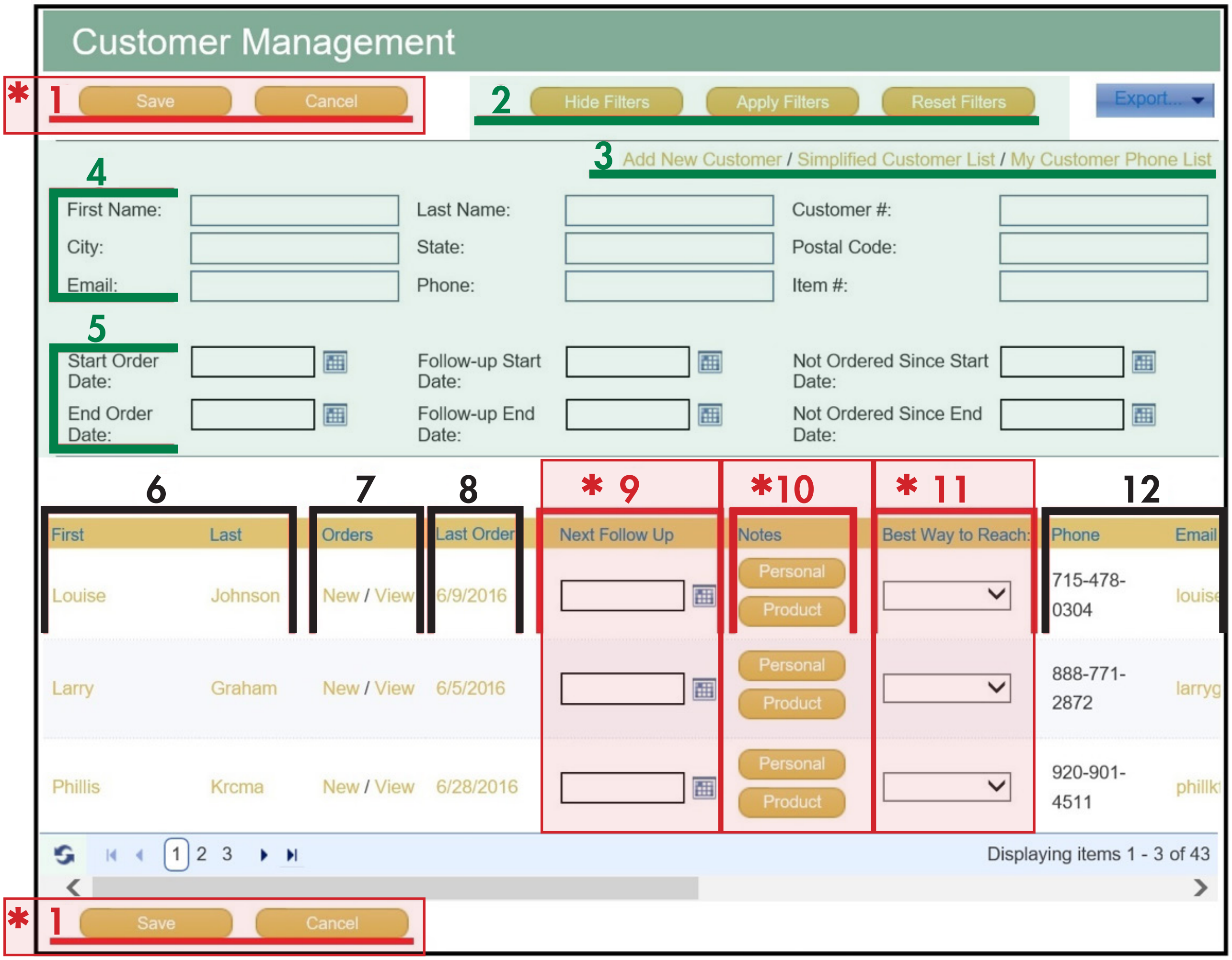
# CUSTOMER MANAGEMENT KEY

▸ **The Customer Management Tool is located within your Business Center, under the Business Tab, on the left labeled Customer Management.**




## 1 SAVE AND CANCEL BUTTON*

Click "Save" after making edits to the Next Follow Up Date or Best Way to Reach columns before moving on to another page or closing the window. For your convenience, the Save and Cancel buttons are located at the top and bottom of the report.

## 2 HIDE FILTERS, 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, or click on a search field and use the backspace button to delete text. Click "Hide Filters" to move the filters out of sight.

### 3 ADD NEW CUSTOMER, SIMPLIFIED CUSTOMER LIST AND MY CUSTOMER PHONE LIST

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.

### 4 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.

### 5 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.

## 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 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 or has not ordered since December 31, 2014. Click on the last order date to view specific details about their last order.

## 9 NEXT FOLLOW UP ✱

***Please remember to click "Save" after entering your Next Follow Up date.*** 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. Please remember to click "Save" after entering a date.

## 10 PERSONAL NOTES AND PRODUCT NOTES ✱

***Please remember to click "Save" after entering information in these fields.*** Use Personal and Product notes to enter information you gathered on the Beauty Profile Form[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 an extra $800-$1000 a 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.

## 11 BEST WAY TO REACH ✱

***Please remember to click "Save" after choosing an option from the dropdown menu.***
This column has a dropdown option that allows you to choose your customers preferred method of contact. Choose from Text, Call, Email or Facebook. Please remember, the best way to reach is not the only way. After choosing an option from the dropdown menu, click "Save."

## 12 CUSTOMER INFORMATION

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

[1] Beauty Profile Form: New customer information form, located in the Learning Center.

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