

- The Customer Management Tool is located within your Business Center, under the Business Tab, on the left labeled Customer Management or just click on the Customer Management icon on your Business Center homepage.

Customer Management

2

3

4

First Name: <input type="text"/>	Last Name: <input type="text"/>	Customer #: <input type="text"/>
City: <input type="text"/>	State: <input type="text"/>	Postal Code: <input type="text"/>
Email: <input type="text"/>	Phone: <input type="text"/>	Item #: <input type="text"/>

5

<b>Order Date Range</b>	<b>Follow-up Range</b>	<b>Not Ordered Since Range</b>
Start Date: <input type="text"/>	Start Date: <input type="text"/>	Start Date: <input type="text"/>
End Date: <input type="text"/>	End Date: <input type="text"/>	Since End Date: <input type="text"/>

6

<b>7</b> Customer Management Report	<b>8</b> Orders	<b>9</b> Free Samples	<b>10</b> Last Order	<b>11</b> Next Follow Up	<b>12</b> Notes	
Jo	New / View	Free Samples	6/6/2017	8/3/2017 <input type="text"/>	Personal	
DeeAnn	New / View	Free Samples	8/10/2015	8/12/2018 <input type="text"/>	Personal	
Joanne	New / View	Free Samples		9/8/2018 <input type="text"/>	Personal	
Emily	New / View	Free Samples	8/4/2015	9/24/2018 <input type="text"/>	Personal	
Kathy	New / View	Free Samples	2/9/2015	<input type="text"/>	Personal	
Transferred	Orders	Free Samples	3/1/2015	<input type="text"/>	Personal	
Donald	New / View	Free Samples	7/30/2015	<input type="text"/>	Personal	
test	New / View	Free Samples	11/18/2016	8/29/2018 <input type="text"/>	Personal	
Amy	New / View	Free Samples		<input type="text"/>	Personal	
Jenny	New / View	Free Samples		<input type="text"/>	Personal	

items per page

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\* 1

L'BRI PURE n' NATURAL

Customer Management Key

1

12 13 14 →

Notes	Best Way to Reach	Phone	Email	City	State	Street1
Product	Text	262-363-9674	devon@lbri.com	WATERFORD	WI	611 State Road
Product		555-666-1234	dee@lbri.com	MUKWONAGO	WI	4500 Winter Rd
Product		896-564-8596	joanner@lbri.com	MUKWONAGO	WI	900 French St
Product		122-456-7896	emily@lbri.com	EAGLE	WI	789 English Rd
Product		123-456-7890	kathyw@lbri.com	MUKWONAGO	WI	8393 N Green D
Product			lucia@lbri.com	MUKWONAGO	WI	640 PERKINS D
Product		262-363-9674	Donald@lbri.com	MUKWONAGO	WI	641 PERKINS D
Product				SAINT PETERS...	FL	test 123
Product			AmySmith@lbri.com	MUKWONAGO	WI	640 Perkins Dr
Product				MUKWONAGO	WI	100 Park St

1 2 3 4 5 6 7 8 9 10 ... 10 items per page 1 - 10 of 197 items

## \*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. The Save and Cancel buttons are located at the bottom of the report.

## 2 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.

## 3 EXPORT

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

## 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.

## 6 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

- 7 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.
- 8 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.
- 9 FREE SAMPLES**

Here you can order free samples 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 or has not ordered since December 31, 2014. Click on the last order date to view specific details about their last order.
- 11 NEXT FOLLOW UP \***

*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.
- 12 PERSONAL NOTES AND PRODUCT NOTES \***

*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<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.
- 13 BEST WAY TO REACH**

*Remember to click "Save" after choosing an option from the dropdown menu.* 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. After choosing an option from the dropdown menu, click "Save."
- 14 CUSTOMER INFORMATION**

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

<sup>1</sup> Beauty Profile Form: New customer information form, located in the Learning Center.