# Tips to Having a Great Webinar Experience

- View the webinar on your computer, but call from an outside phone line for better audio.
- Ensure you're internet connection is strong.
- Live streaming uses a lot of computer memory. To help with this, ensure you've closed all applications running on your computer except for the webinar.
- Print the PDF handout for note-taking and to jot your questions down to ask during the question and answer portion of the webinar.


*The webinar will begin shortly!*

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# Welcome

The following webinar will begin shortly:

## Customer Management

Learn about the different fields, settings and tool bar buttons on the customer profile as well as setting customers to inactive/active status and moving to a different list or the recycle bin. We'll also cover the List Builder and customer product usage to utilize these features for your next open house event.

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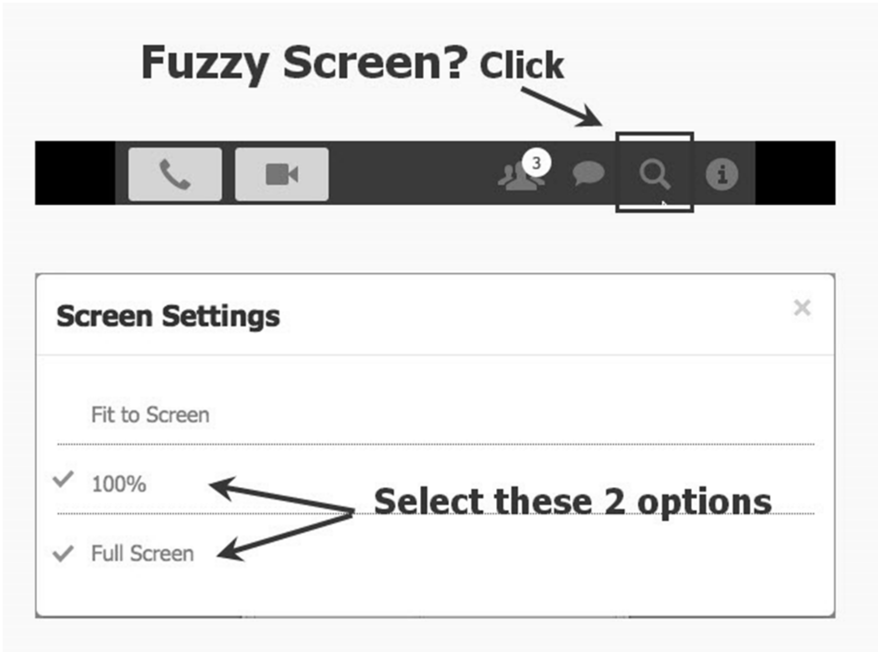


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## Customer List Tool Bar Buttons

1. **View**: Default views include Default, Birthdays and Cards
2. **Customize**: Add columns using Column Chooser; create or load views as well as deleting or resetting views
3. **Find**: Find customers in the list
4. **New**: Add a new customer profile
5. **Edit**: Opens the selected customer
6. **Delete**: Deletes the selected customer (Moves the profile to Boulevard's Recycle Bin)
7. **Invoice**: Initiates a new invoice for the selected customer
8. **Call**: Creates a new call note for the selected customer(s)
9. **Payment**: Post a payment for the selected customer. If multiple customers are selected it will clear all of the selected customers' account balances.
10. **Email**: Launches an email for the selected customer. If multiple customers are selected it will initiate a group email.
11. **List Builder**: Add the selected customer(s) to a new or existing List Builder list.
12. **Copy Special**: Copies various information for the selected customer(s)
13. **Send to/Print**: Print, preview or preview mailing labels for the selected customer(s) in the current view.
14. **Move to**: Mark multiple customers either active or inactive. This function is used in conjunction with the Inactive Customers filter.
15. **Settings**: Set if and/or when notifications appear for birthdays, anniversaries, upcoming auto deliveries, as well as the default language preference.

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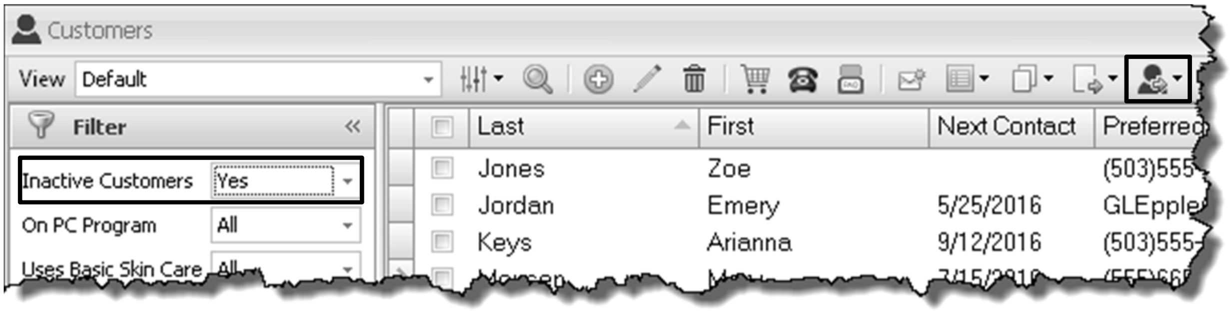
# Customer Active/Inactive Status




### Mark a Customer Inactive:

1. From the Customer List, select **No** from *Inactive Customers* filter.
2. Select the check box next to the customer.
3. Click the status button, and select **Inactive**.

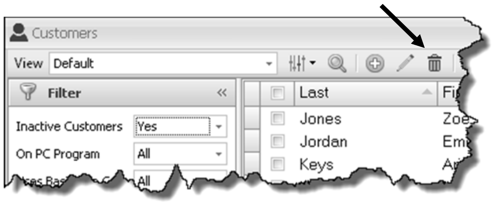
### Mark a Customer Active:

1. From the Customer List, select **Yes** from *Inactive Customers* filter.
2. Select the check box next to the customer.
3. Click the status button, and select **Active**.



# Recycle Bin

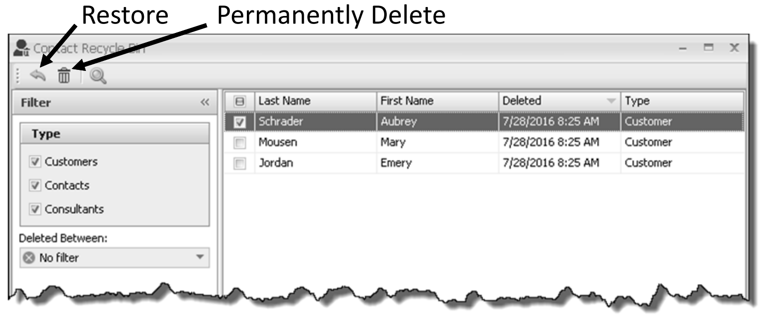
Move to Recycle Bin




### Move Customer to the Recycle Bin:

1. From the Customer List, select the check box next to the customer.
2. Click the delete button, then **Yes** to confirm deletion.

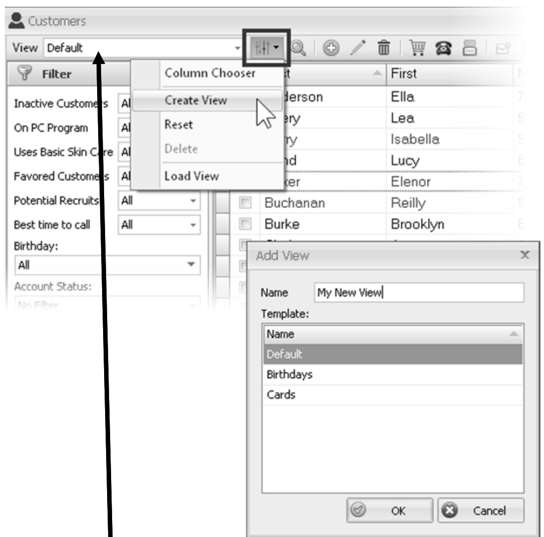
Restore    Permanently Delete




### Restore or Delete from the Recycle Bin:

1. From the Shortcuts form, select **Recycle Bin** (or from the *File* menu select *Recycle Bin*).
2. Select the check box next to the customer.
3. Click **restore** button, to move the contact back to the list it was deleted from or click the **delete** button to permanently delete the contact from Boulevard.
4. Click **Yes** to confirm the action to be taken.

# Create a Customer View




1. From the Customer list tool bar click then select **Create View**.
2. Give the new view a description under the **Name** field.
3. Decide which template to base the new view on, then click **OK**.
4. To add additional columns click then select **Column Chooser**.
5. Use the drag and drop method to add columns to the desired location on the current view.

Additional Info:

- To hide any unwanted columns, right click on the column header and select **Hide This Column**.
- Created views, can be deleted by selecting them from the **View** drop down. Click then select **Delete** and **Yes** to confirm.
- Default views cannot be deleted, but can be reset to their original state. Click then select **Reset** and **Yes** to confirm.

Access created views from the View drop down. It can then be printed as a report or used to create a List Builder list, send individual and group email, and mailing labels.

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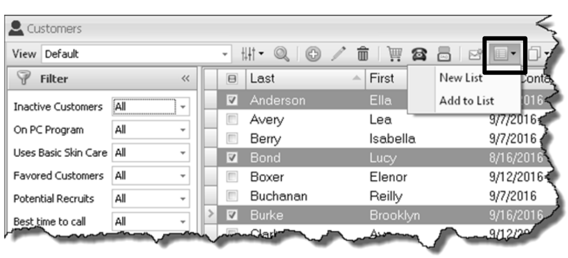
# List Builder




**Add Customer to a Name List:**

1. From the Customer List, select the check box next to the customers.
2. Click the List Builder button, then choose **New List** or **Add to List**.
3. If **New List**, enter a description of the new list name then select OK.
4. If **Add to List**, select a name list the customers will be added to.


**Use the List Builder to Create Individual or Multiple:**

- Send Email
- Contact Log Entry

And print to use as a guest list too!

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★ Indicates newly added in Boulevard 2017

1. Next/Previous
2. Save (Save only & Save and New)
3. Undo
4. Delete
5. **New Invoice** ★
   - Invoice
   - New Historical
6. Email
   - Primary
   - Spouse
   - Secondary
7. **Appointment** ★
8. **Action Item** ★
   - Multiple Action Items
9. **Call Note** ★
10. **Copy to Clipboard** ★
    - Name
    - Name & Address
    - Name, Address and Phone
11. **Move to** ★
    - Customer List
    - Address List
    - Unit List
    - International Unit List
12. **Print** ★
    - Profile
    - Products
    - Call History
    - Checklist
    - Statement of Account
    - Account Balance Transactions
13. **Photo** ★
    - Change Photo
    - Visible
14. Skin Care Profile
15. Chart
16. Map
17. Stamps.com
18. **Payment** ★
19. ProPay
20. **Settings** ★

## Profile Tool Bar Buttons

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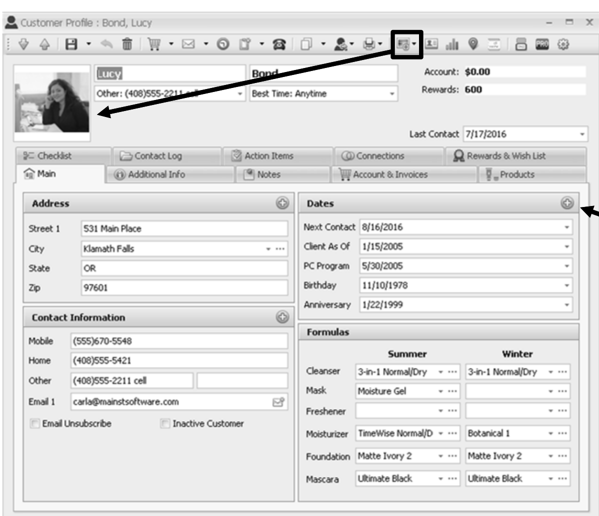
# Customer Profile

Main tab




- The fields at the top of the profile remain visible when moving through the different tabs of the customer profile
- Choose whether or not to display images for everyone
- Add additional information using the section add buttons

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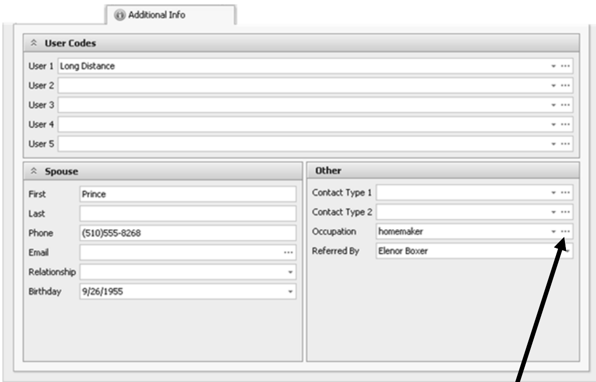
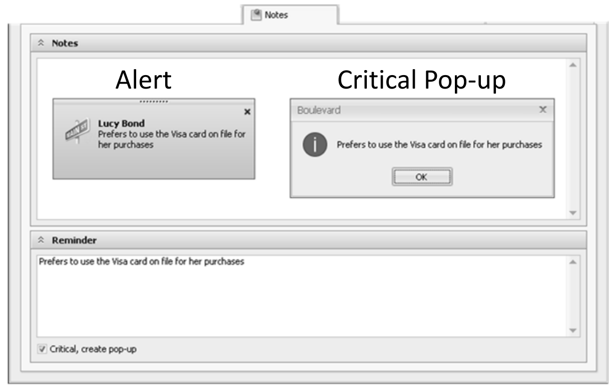
Additional Info & Notes tabs




- User Code fields allow you to add contacts to custom groups
- Any time an ellipsis button is displayed the field options can be globally edited

- Option to add an Alert, or Critical Pop-up

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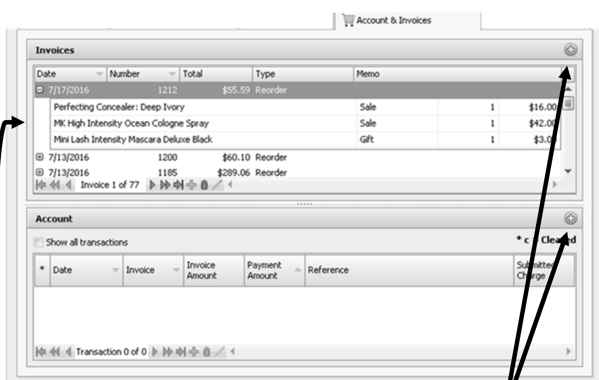
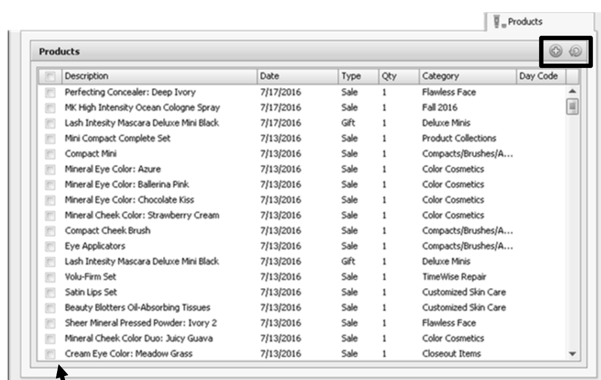
Account & Invoices & Products tabs




- The section add buttons can be used to create a new invoice or add a payment
- Expand the invoice to get a quick view of the items contained in the invoice

- Check boxes can be used to create a quick Reorder or Return invoice, or add an item to Auto Delivery

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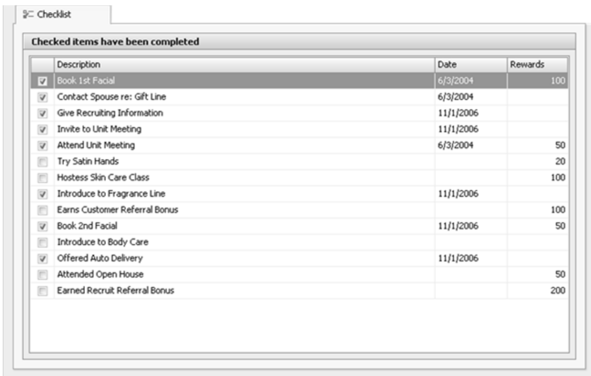
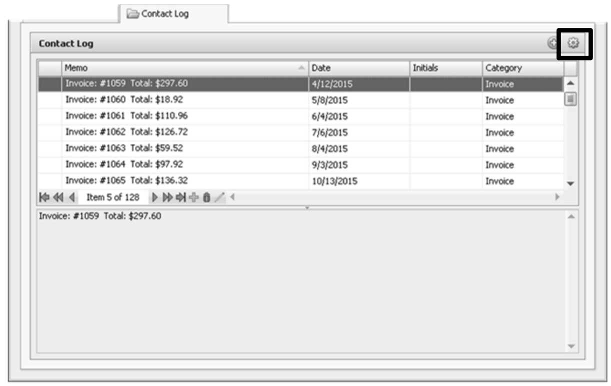
Checklist & Contact Log tabs




- A Date field has been added to track when an item has been completed
- Option to give Reward Points when items have been completed

Edit menu > Settings > Checklist

- System-generated entries are added to give additional information such as invoices created and payments made
- Options to choose to hide the system entries and whether the entry is collapsed

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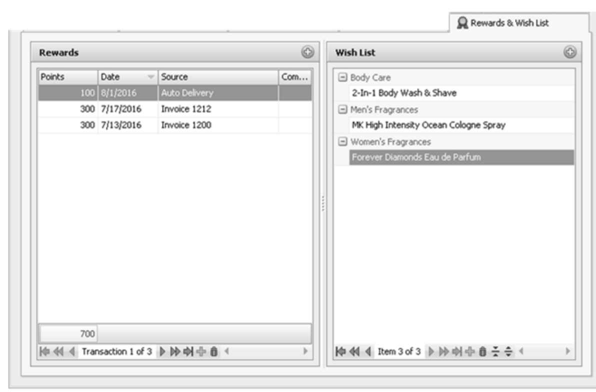
Rewards & Wish List and Connections tabs


- Link Address contacts to customer or consultant profiles
- Great tracking for follow ups with skin care party guests that did not purchase, or potential consultants

- Rewards will only be displayed if tracking Reward points

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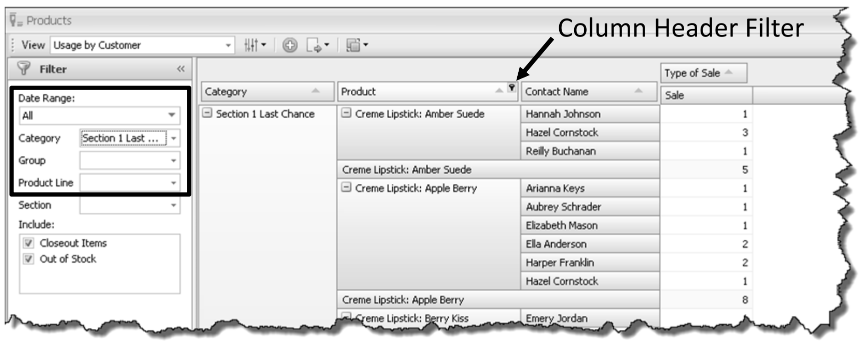
## Customer Product Usage for a Group of Products




1. From the Product List, select the **Usage by Customer** view.
2. On the **Filter** side bar select the **Date Range** you'd like included.
3. Choose the applicable **Category**, **Group** or **Product Line** *(for example **Section 1 Last Chance** from the Category drop-down).*

Filter from column header to refine the information further.

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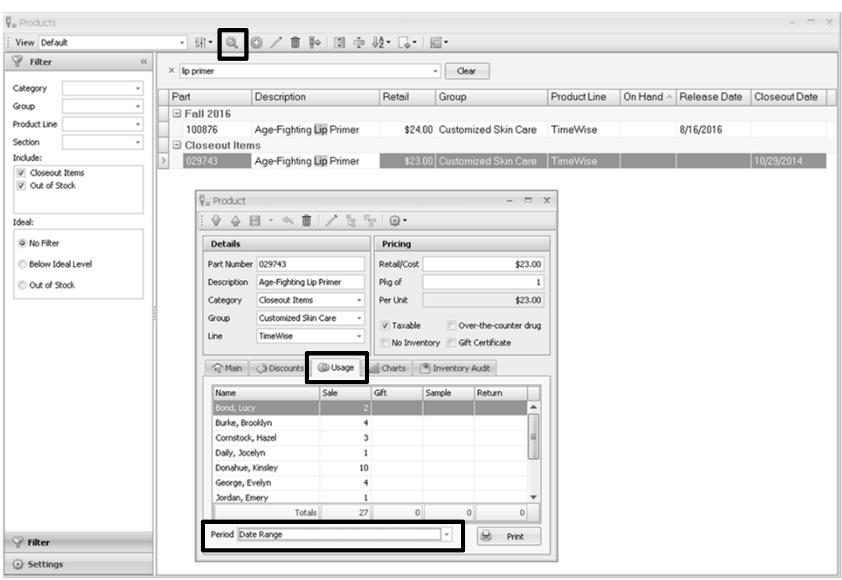
## Customer Product Usage for an Specific Product



1. From the Product List tool bar, click the Find button, and enter a partial description.
2. After locating the item, open the product's profile form.
3. Click on the **Usage** tab, then from the **Period** drop-down select an option for the desired date range.

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# Questions?

## We're Happy to Answer Them!

- This is a live broadcast; so that everyone may hear you, please ensure you're in a quiet area.
- We want to respect everyone's time and try to answer as many questions as possible. Please keep the questions to the topics covered.
- Dial ***6**


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## Additional Questions?

Email, Facebook post or tweet a message using the hashtag:

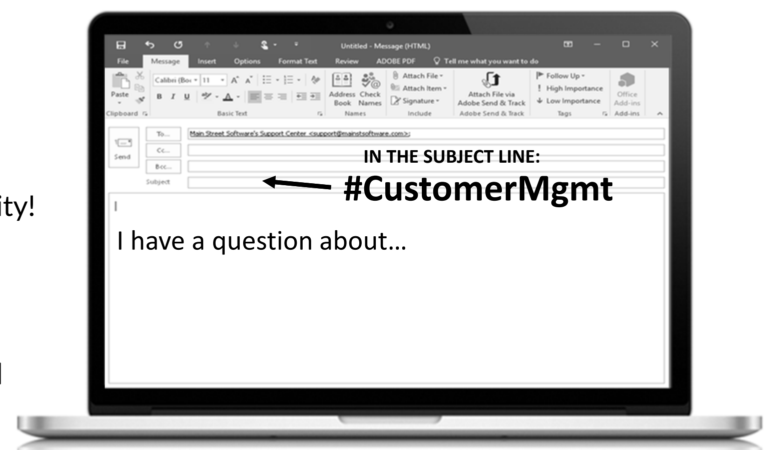
**#CustomerMgmt**

Your question will receive top priority!

## Upcoming Webinar

**Getting a Fresh Start in Boulevard**

- Customers
- Inventory
- Entering historical info (company product orders, customer sales and expenses)

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