

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!



Welcome

The following webinar will begin shortly:

Aspects of Invoicing

Learn about the different fields on the invoice as well as setting discount types, invoicing product collections, items for personal use or business supplies, handling gift certificates and posting payments.



Fuzzy Screen? Click



Screen Settings

Fit to Screen

✓ 100%

✓ Full Screen

Select these 2 options

Experiencing technical difficulties connecting to the webinar?

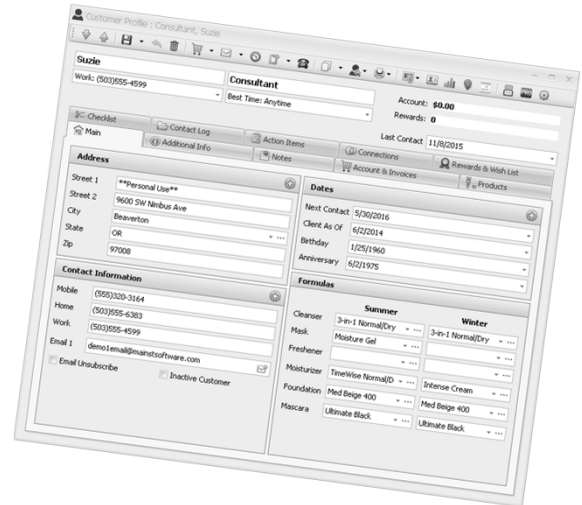
Call the webinar
Customer Support:
877-553-1680



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Advantages to Personal Use & Business Supplies Profiles

- Invoice follow up is set to 0 days
- 50% invoice discount
- Specific Discount Type
- Option to omit from weekly sales totals and/or Gross Receipts report for personal use
- Option to create an expense entry directly from the invoice using the one business supplies profile used for demos, items given to charity, gifts, and expired product
- View Sales Transactions for the different discount types

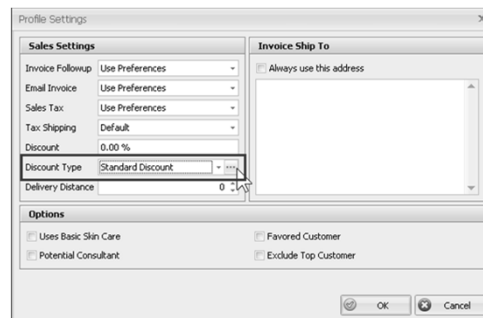
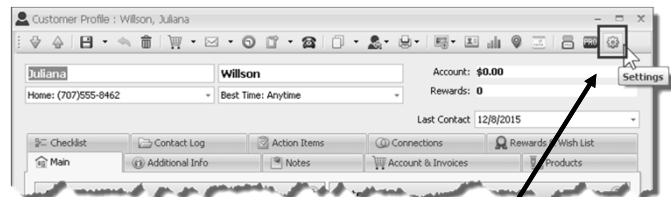


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Default Discount Types

- Standard Discount
- Native Indian *(Canadian version only)*
- Personal Use *(Labeled Own Use in Canadian version)*
- Hostess Credit
- Birthday/Anniversary
- Business Supplies



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Creating a New Invoice



- Shortcuts Form
- Profile Tool Bar (with historical option)
- Main Tool Bar (with historical option)
- Profile Products Tab
- Customer List Tool Bar
- Auto Delivery Form

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Invoice Tabs

Details		Subtotal	
Cash/Check	\$0.00	Subtotal	\$107.00
Check Number		Discount	\$0.00
Credit Card	\$0.00	Tax	\$8.29
On Account	\$115.29	Shipping	\$0.00
Memo		Total	\$115.29

Discount	
Discount Amount	Discount Type
<input checked="" type="radio"/> Percent 0.00 % <input type="radio"/> Flat Amount \$0.00	Standard Discount

Shipping / Delivery	
<input type="checkbox"/> Ship to address below <div></div>	<input type="checkbox"/> Add Trip Log Entry Distance 0

Weekly Accomplishment	
Hostess Name	
Time spent 0	Basics 0
Calls/Guests 0	Interviews held 0
Orders 1	New recruits 0
Bookings 0	

Sale Types

- Reorder
- Guest Checkout*
- EZ Ship*
- Web
- PC Program
- Facial
- Double Facial
- Class
- On the Go
- Shows
- Misc
- Seasonal
- Personal Use
- Business Supplies

* Product Order tab becomes visible

Product Order	
<input type="checkbox"/> Add Freight to Product Order	
Freight	\$5.50
Section 2 Tax	\$0.00

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Invoice Form Breakdown

Invoice: Wilson, Juliana

Previous Balance \$0.00 New Balance \$0.00 Reward Points 0

STATUS BAR

Number 1190 Date 7/6/2016 Sale Reorder

Part#	Description	Type	Qty	Price	Total	Discount%	Day Code	Product is For
MAIN INVOICE GRID								

0 Items

DETAILS Discount Shipping / Delivery Weekly Accomplishment INVOICE TABS

Cash/Check	<input checked="" type="checkbox"/>	\$0.00	Subtotal	\$0.00
Check Number			Discount	\$0.00
Credit Card	<input checked="" type="checkbox"/>	\$0.00	Tax	\$0.00
On Account		\$0.00	Shipping	\$0.00
Memo			Total	\$0.00

Buttons & Options: OK, Cancel, Email, Print, Copies, Lookup..., Item Delete, Note..., Import, Rewards...

BUTTONS
&
OPTIONS

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Reward Redemption

Invoice: Anderson, Ella

Previous Balance \$0.00 New Balance \$59.40 Reward Points 1269

Number 1192 Date 7/7/2016 Sale Reorder

Part#	Description	Type	Qty	Price	Total	Discount%	Day Code	Product is For
063588	Microdermabrasion Plus Set	Sale	1	\$55.00	\$55.00	0		

1 Items

DETAILS Discount Shipping / Delivery Weekly Accomplishment INVOICE TABS

Cash/Check	<input checked="" type="checkbox"/>	\$0.00	Subtotal	\$55.00
Check Number			Discount	\$0.00
Credit Card	<input checked="" type="checkbox"/>	\$0.00	Tax	\$4.40
On Account		\$59.40	Shipping	\$0.00
Memo			Total	\$59.40

Redeem Rewards Dialog:

Available Points 1,269

☒ Redeem Points

x \$0.01 Redemption Rate

= \$12.69 Discount

OK Cancel

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Product Collections

A Product Collection is a special grouping of products which contain both constant (brushes, compact, etc.), and variable items that are selected at the time of the sale for the individual customer (eye colors, lip colors).

Example

Mini Compact Complete Set

CONSTANTS:

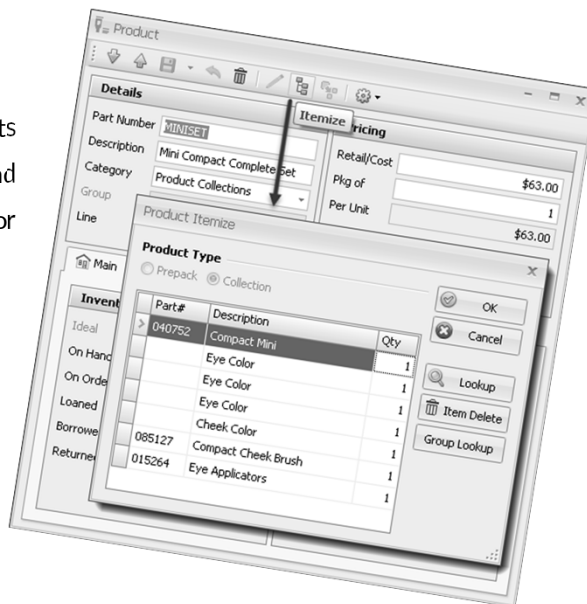
- Compact Mini
- Compact Cheek Brush
- Eye Applicators

VARIABLE ITEMS:

- 3 Eye Colors
- 1 Cheek Color

Only the retail price for the entire collection is displayed on the customer's invoice, not the individual items which allows for adding the cost of wrapping or other packaging!

For detailed instructions, search **Create a Product Collection** from the Boulevard Support Center website.



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Product Prepacks

A Product Prepack is a special grouping of products which contain the same items when sold to any customer.

Example

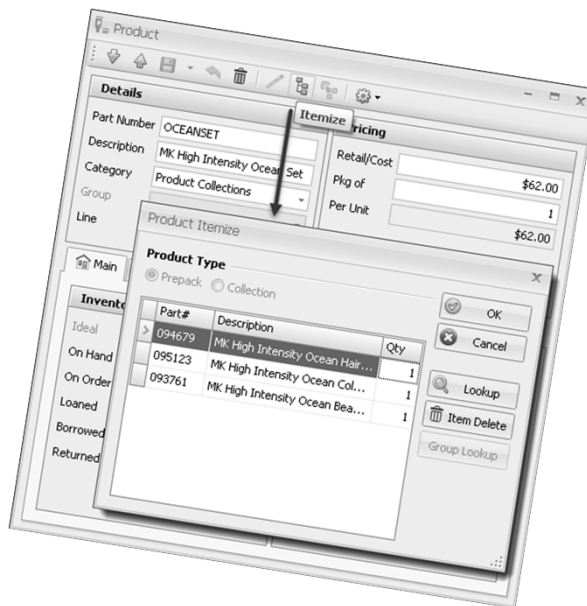
MK High Intensity Ocean Set

CONSTANTS:

- MK High Intensity Ocean Hair & Body Wash
- MK High Intensity Ocean Cologne Spray
- MK High Intensity Ocean Beach Towel

Only the retail price for the entire collection is displayed on the customer's invoice, not the individual items which allows for adding the cost of wrapping or other packaging!

For detailed instructions, search **Create a Product Prepack** from the Boulevard Support Center website.



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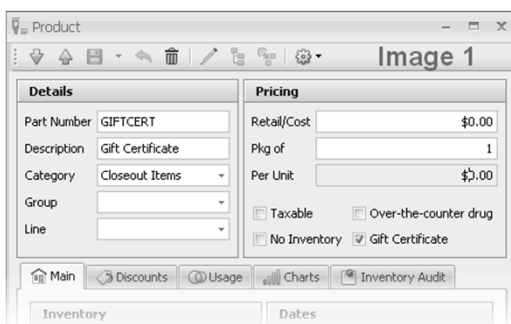
Gift Certificates

Find Out First...

Before adding an expiration date to gift certificates you are selling, we recommend that you find out from your local taxing authority whether or not it is legal.

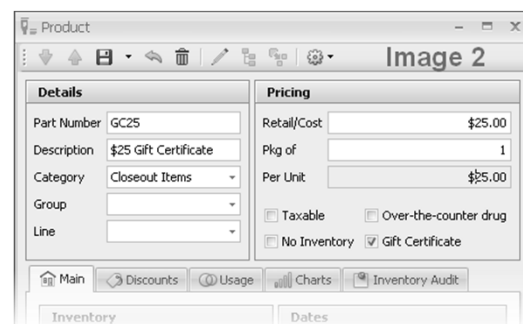
Add a Gift Certificate Part Number

For detailed instructions, search **Handling Gift Certificates** from the Boulevard Support Center website.



Product window (Image 1) showing the Details and Pricing tabs. The Part Number is GIFTCERT, Description is Gift Certificate, Category is Closeout Items, and the Price is \$0.00. The Gift Certificate checkbox is checked.

- Set the price at the time of the sale



Product window (Image 2) showing the Details and Pricing tabs. The Part Number is GC25, Description is \$25 Gift Certificate, Category is Closeout Items, and the Price is \$25.00. The Gift Certificate checkbox is checked.

- Ability to track sales quantities for specific denominations

With either option, ensure that the **Taxable** field is *not* checked and that **Gift Certificate** is checked.



Selling a Gift Certificate

(Purchaser's Invoice & Profile Shown)

- Add the invoice number to the actual gift certificate
- Reference the gift certificate in the Memo field

Invoice: Daily, Jocelyn

Previous Balance \$0.00 New Balance \$25.00 Reward Points 0

Number 1210 Date 7/11/2016 Sale Reorder

Part#	Description	Type	Qty	Price	Total	Discount%	Day Code	Product is For
GC25	\$25 Gift Certificate	Sale	1	\$25.00	\$25.00	0		Lea Avery

Optional: To display the Gift Certificate under the Recipient's Product History instead of the Purchaser's Product History.

Details Discount Shipping / Delivery Weekly Accomplishment

Cash/Check ☒ \$0.00 Subtotal \$25.00

Check Number Discount \$0.00

Credit Card ☒ \$0.00 Tax \$0.00

On Account \$25.00 Shipping \$0.00

Memo GC: Lea Avery Total \$25.00

Customer Profile: Daily, Jocelyn

Jocelyn Daily Account: \$11.91 Rewards: 1025

Home: (408)555-1468 Best Time: Anytime Last Contact: 7/11/2016

Invoices

Date	Number	Total	Type	Memo
7/11/2016	1210	\$25.00	Reorder	GC: Lea Avery
7/11/2016	1210	\$25.00	Sale	1 \$25.00

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Redeeming a Gift Certificate

Invoice: Avery, Lea

Previous Balance \$0.00 New Balance \$16.20 Reward Points 0

Number 1218 Date 7/18/2016 Sale Reorder

Part#	Description	Type	Qty	Price	Total	Discount%	Day
093239	Creme Lipstick: Hearts Together	Sale	1	\$15.00	\$15.00	0	

Details Discount Shipping / Delivery Weekly Accomplishment

Cash/Check ☒ \$0.00 Subtotal \$15.00

Check Number Discount \$0.00

Credit Card ☒ \$0.00 Tax \$1.00

Gift Certificate \$16.20

On Account \$0.00

Memo GC Redeemed: Inv#1210

Note

Gift Certificate Redeemed. New Balance: \$8.72

- Enter amount used under the new payment option **Gift Certificate**
- For cross reference tracking, add **Memo** with the invoice number
- Add new balance **Note** on invoice and gift certificate

(Recipient's Invoice)



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Posting Payments

- Tool Bar Button
- Right-Click Menu
- Clear Multiple Accounts



For detailed instructions, search **Posting a Customer Payment** from the Boulevard Support Center website.

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



Additional Questions?

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

#Invoicing

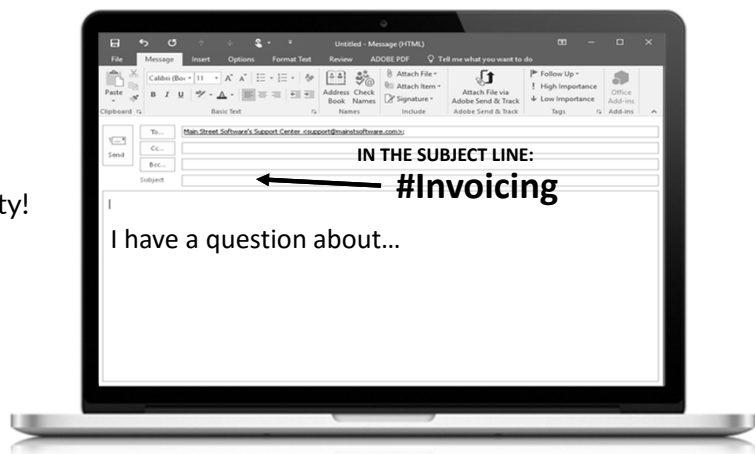
Your question will receive top priority!



Upcoming Webinar

Customer Management:

- Profiles
- Checklists
- Active & Inactive Status
- Moving profiles between lists
- Add a contact note for multiple profiles
- Filters and Settings



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