

# IN TOUCH HELP

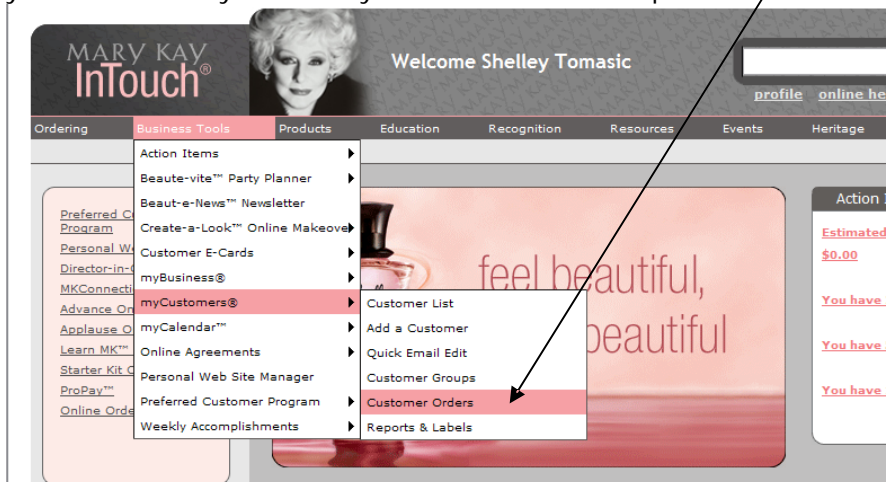


## WHAT TO DO AFTER EACH SALE:

1. Complete an order form. (Remember to calculate sales tax on TOTAL sale BEFORE any discounts.)
2. Fill the order.
3. Within 24 hours do the following on the InTouch Site ([www.marykayintouch.com](http://www.marykayintouch.com)):

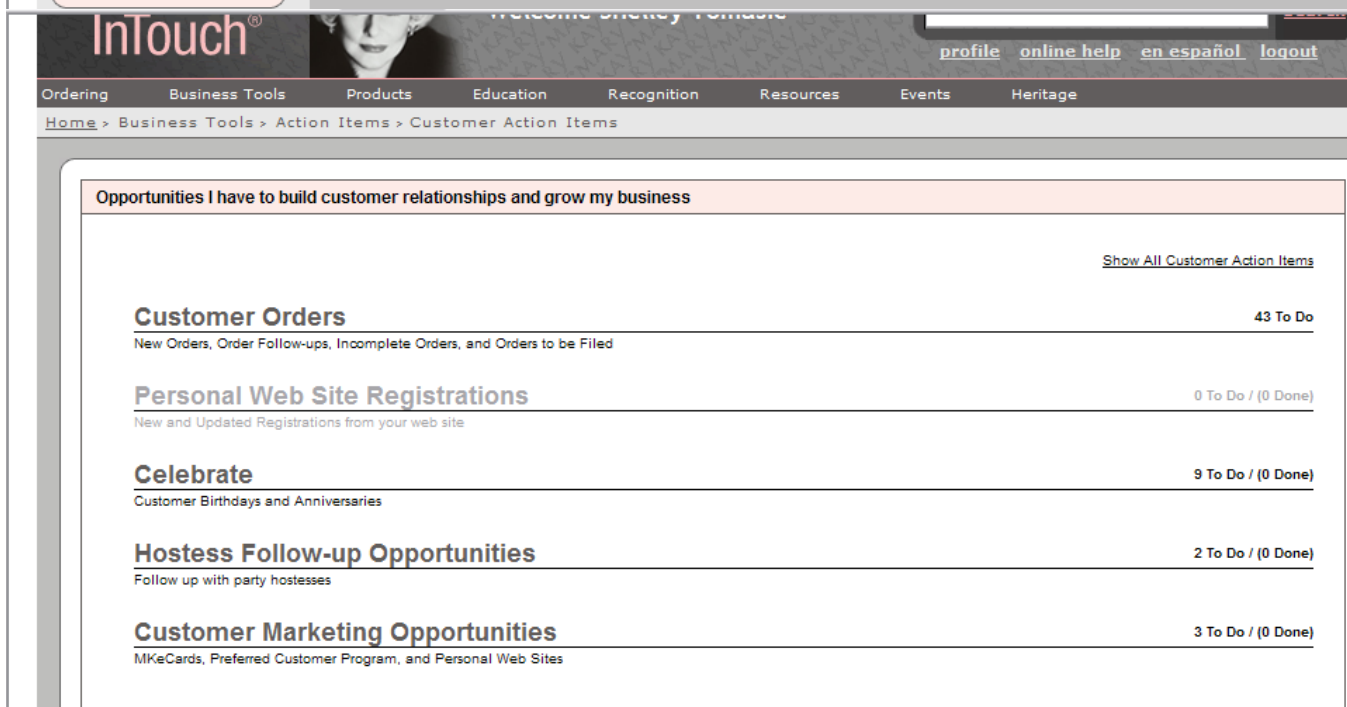
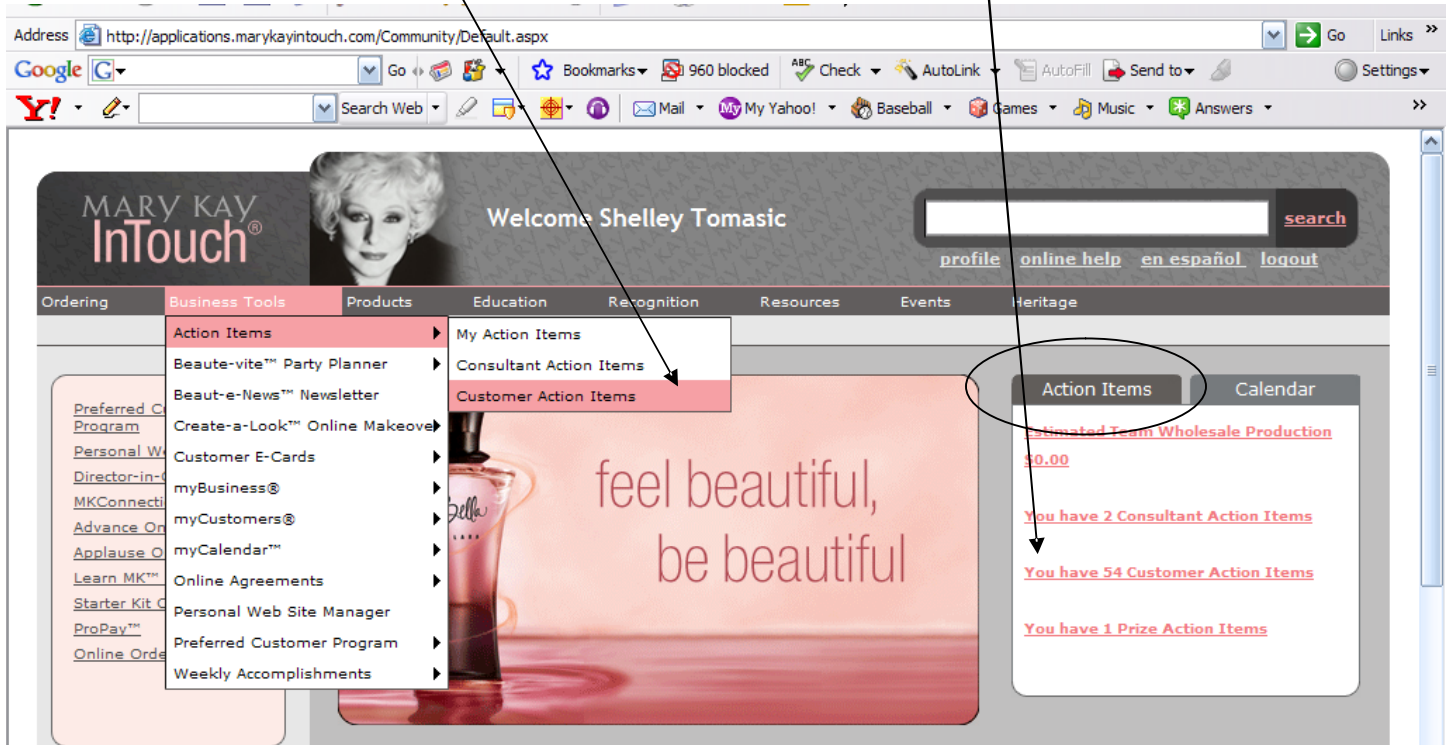
### First:

- From the InTouch home page, go to Business Tools, then myCustomers, then Customer Orders.
- From My Customers Orders, click the box "Create a New Sales Ticket"
- Choose from existing customer or new (NOTE: If it is a new customer you will need to enter some customer information and eventually enter the profile info as well.)
- Complete the different sections of the screen. NOTE: You'll want to mark a follow-up with the customer approximately 2 days after their order.
- Enter products (or part number) for everything that was sold to the customer. (Be patient, as you do this more it will get much faster and easier!)
- If customer has paid already by check or cash, mark as paid. If using a credit card, you can enter the total amount to charge the credit card and then click on "Enter Credit Card" information. If the customer has not paid yet, simply click on "Update" so everything is saved. (You can come back to this via the Action Items screen. **See the top of page 3 for this info.**)
- NOTE: the total will not match exactly since discounts and sales tax are not included in here. However the information that is entered in this section is stored under each customer's records so you know exactly what they have ordered in the past.



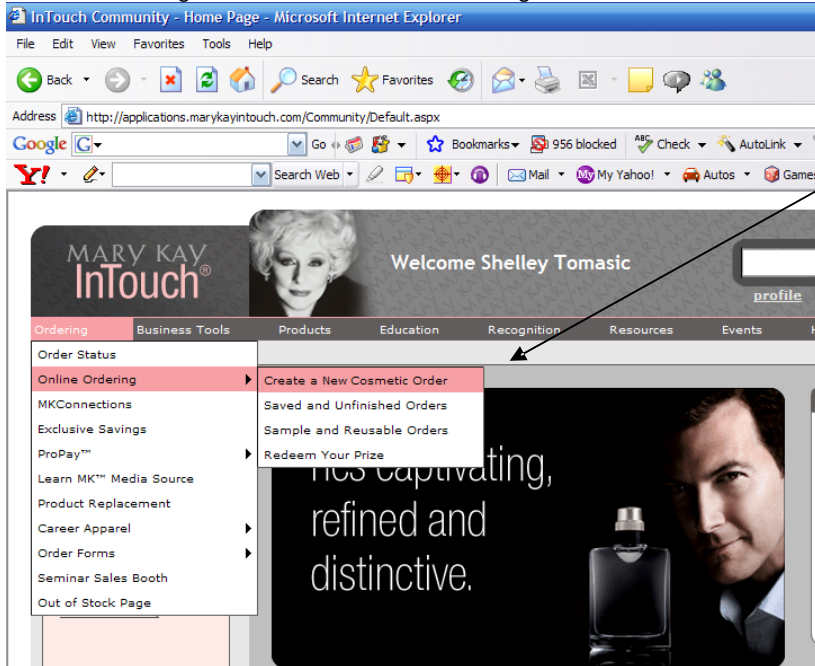
EVERY DAY OR EVERY OTHER DAY - to stay on top of customers:

- From the InTouch home page, you can either go to Business Tools, then Action Items, then Customer Action Items, OR from the home page click on Action Items on the right side of the screen.
- This will give you all of the items you need to follow-up on (see second screen shot below).
  - Customer Orders (new, follow-up, etc.)
  - Personal Web Site Registrations
  - Celebrate (birthdays and anniversaries)
  - Hostess Follow-up
  - Customer Marketing Opportunities (i.e. e-cards that can be sent, etc.), and

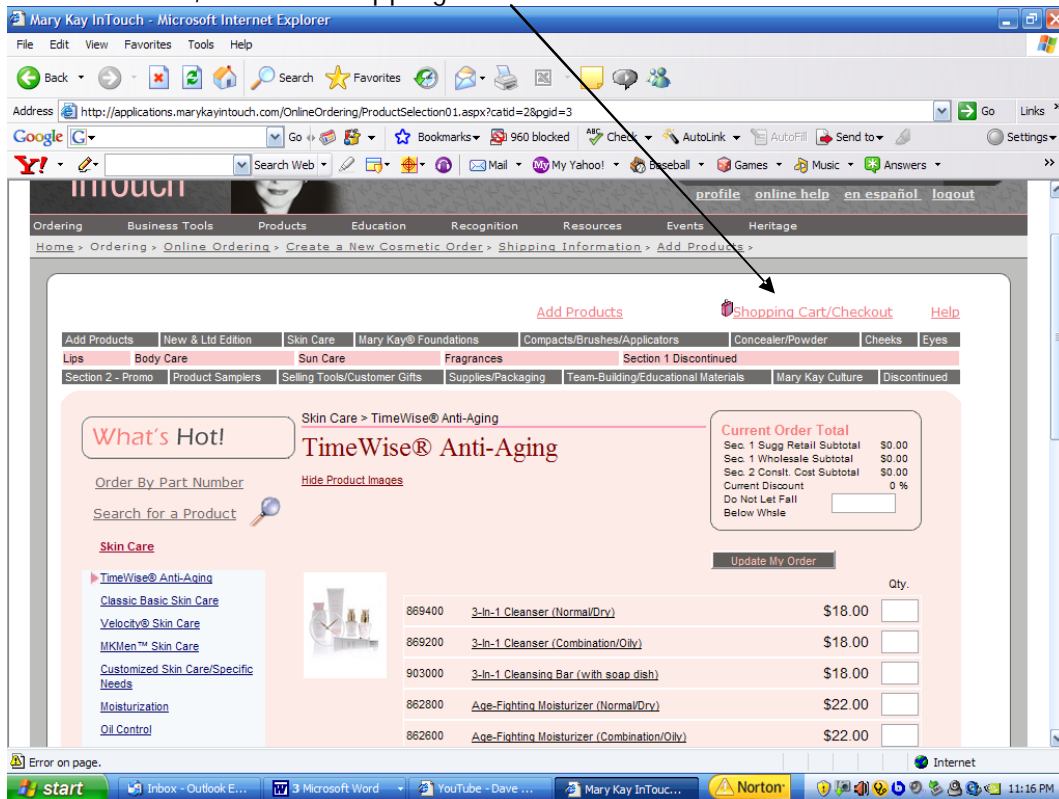


## ONLINE ORDERING:

- If ordering online, click on Ordering, then Online Ordering, then Create a New Cosmetic Order



- Click Accept, then confirm correct shipping address, click Continue.
- Click on the appropriate headings and you'll get a list of available products (see below). It takes a little time to get comfortable where it all is, but once you do it's fairly easy. As you enter items be sure to "Update Your Order."
- When finished, click on Shopping Cart/Checkout





**Reorders & Other Accomplishments!**

My Goal:  
DIQ \$2000 in Sales

Enter YTD from LAST MONTH:	Sales:	\$4,798.75
Given Away:	Rec. Tax:	

Consultant:	Susie Consultant		Ph #:	555-1212		Email:	susie@email.com					
Address:			Director:	Allison LaMarr								
CUSTOMER (Reorder, Online/Website, Show, On-the-Go, Phone Call, etc.)	Phone Number	Date	\$ Sold (Retail)	\$ Product Given Away at Suggested Retail (Section 1)	\$ Sold MINUS retail = product given away	\$ Tax Received	\$ Non-Recovered Tax	Hostess Purchase (Section 2)	Booking (A=Asked) # of bookings	PLACEMENT (Section 3)	24-48 Hr. Follow-Up (C/D)	Recruit (Date of agreement)
1 Jane Customer	555-2121	8/6	\$115.00	\$6.50	\$108.50	\$9.49	\$0.00	\$4.00	A	1 on 1	C	
2 Amber Customer	555-3131	8/15	\$42.00	\$0.00	\$42.00	\$3.47	\$0.00	\$4.00	1	Phone	D	8/16
3				\$0.00	\$0.00		\$0.00					
4				\$0.00	\$0.00		\$0.00					
5				\$0.00	\$0.00		\$0.00					
6				\$0.00	\$0.00		\$0.00					
7				\$0.00	\$0.00		\$0.00					
8				\$0.00	\$0.00		\$0.00					
9				\$0.00	\$0.00		\$0.00					
10				\$0.00	\$0.00		\$0.00					
11				\$0.00	\$0.00		\$0.00					
12				\$0.00	\$0.00		\$0.00					
13				\$0.00	\$0.00		\$0.00					
14				\$0.00	\$0.00		\$0.00					
15				\$0.00	\$0.00		\$0.00					
16				\$0.00	\$0.00		\$0.00					
17				\$0.00	\$0.00		\$0.00					
18				\$0.00	\$0.00		\$0.00					
19				\$0.00	\$0.00		\$0.00					
20				\$0.00	\$0.00		\$0.00					
21				\$0.00	\$0.00		\$0.00					
22				\$0.00	\$0.00		\$0.00					
23				\$0.00	\$0.00		\$0.00					
24				\$0.00	\$0.00		\$0.00					
25				\$0.00	\$0.00		\$0.00					
26				\$0.00	\$0.00		\$0.00					
27				\$0.00	\$0.00		\$0.00					
28				\$0.00	\$0.00		\$0.00					
29				\$0.00	\$0.00		\$0.00					
30				\$0.00	\$0.00		\$0.00					
<b>TOTALS:</b>			\$157.00	\$6.50	\$150.50	\$12.96	\$0.00	\$8.00	1	2	2	1
Totals from Page 1:			\$740.00	\$54.00	\$686.00	\$59.47	\$1.59	\$30.00	4	7	7	1
TOTALS to date for the month:			\$897.00	\$60.50	\$836.50	\$72.43	\$1.59	\$38.00	5	9	9	2

**Reorders & Weekly Page 2 Information:**

1. Enter your monthly Goal & YTD from prior month in top right fields.
2. Enter customer/potential team member information completely as reorders/interviews take place throughout the month.
3. Enter the weekly dates given to you from your Director (weeks run from Sun. - Sat.)
4. Manually enter weekly activity from both pages into the fields: sales, classes, faces, interviews, follow-up, bookings, & new contacts. Your Director will use the information for weekly recognition, and it will help you to see your weekly progress towards your Perfect 10!!!
5. You may copy & paste the weekly box every Monday into an email or you may attach the file.

<b>Week 1:</b>		7/25-8/4	
Total Retail Sales:	\$382.00	+ YTD Total:	\$4,798.75
		+ New YTD Total:	\$5,180.75
Total Classes:	1	Faces:	4
Interviews Held:	4	With Follow-Up:	4
Bookings: S M T W Th F s		Total:	2
Contacts: S M T W Th F s		Total:	4
Daily iPA Goal: 2 New Bookings & 5 New Contacts+			
<b>Week 2:</b>		8/5-8/11	
Total Retail Sales:	\$515.00	+ YTD Total:	\$5,180.75
		+ New YTD Total:	\$5,695.75
Total Classes:	0	Faces:	3
Interviews Held:	3	With Follow-Up:	3
Bookings: S M T W Th F s		Total:	2
Contacts: S M T W Th F s		Total:	3
Daily iPA Goal: 2 New Bookings & 5 New Contacts+			
<b>Week 3:</b>		8/12-8/18	
Total Retail Sales:		+ YTD Total:	\$5,695.75
		+ New YTD Total:	\$5,695.75
Total Classes:		Faces:	
Interviews Held:		With Follow-Up:	
Bookings: S M T W Th F s		Total:	0
Contacts: S M T W Th F s		Total:	0
Daily iPA Goal: 2 New Bookings & 5 New Contacts+			
<b>Week 4:</b>		8/19-8/25	
Total Retail Sales:		+ YTD Total:	\$5,695.75
		+ New YTD Total:	\$5,695.75
Total Classes:		Faces:	
Interviews Held:		With Follow-Up:	
Bookings: S M T W Th F s		Total:	0
Contacts: S M T W Th F s		Total:	0
Daily iPA Goal: 2 New Bookings & 5 New Contacts+			
<b>Week 5:</b>			
Total Retail Sales:		+ YTD Total:	\$5,695.75
		+ New YTD Total:	\$5,695.75
Total Classes:		Faces:	
Interviews Held:		With Follow-Up:	
Bookings: S M T W Th F s		Total:	0
Contacts: S M T W Th F s		Total:	0
Daily iPA Goal: 2 New Bookings & 5 New Contacts+			

\*Place Recruiting Information In every re-order bag (any Mary Kay team-building flyer).

Section 2 Sales Aids:	Section 1 Wholesale:
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- Customer - enter the name of your reordering customer or prospect interviewed but not facialed
- Phone - customer primary phone number
- Date - date of the order or interview
- \$ Retail Sold - this is the total amount of the sales ticket
- Product given away - enter the retail amount of any section 1 products given away
- Sold minus retail - do nothing, the spreadsheet will enter this figure for you
- Tax received - enter the amount of tax received from the sale
- Non recovered Tax - do nothing, the spreadsheet will enter this figure for you
- Hostess Gifts/PCP - enter your cost of PCP gifts or hostess gifts given (section 2)
- Booking A=Asked - if you asked for a booking enter an A in this field
- # of new bookings - enter the number of appointments booked for each guest
- Recruiting info - did you give team building flyer or CD with the order
- Place interviewed - where & who did the interview
- 24-48 hour follow up - Enter C if you the consultant followed up, or D if your Director did
- Recruit - enter the date of the agreement for your new team member
- Weekly boxes - enter dates given to you from your Director
  - o Total Retail Sales - Total sales for the week from page 1 & 2 of your tracking sheet
  - o YTD & New YTD - do nothing, the spreadsheet will enter this figure for you
  - o Enter your weekly accomplishments - classes, faces, bookings, Int., new contacts

EVERY MONDAY - #'s for the week need to be in to Allison:

Every Monday copy & paste the weekly box into an email and send to your Director.  
 The weekly box is located on page 2 of the Perfect 10 Tracking sheet. You will need to manually enter the information from your weekly activity into the weekly box.

Week 2:		8/5-8/11													
Total Retail Sales:		\$515.00					+ YTD Total:		\$5,180.75						
							= New YTD Total:		\$5,695.75						
Total Classes:		0					Faces:		3						
Interviews Held:		3					With Follow-Up:		3						
Bookings:			S	M		T		W		Th		F	s	Total:	2
Contacts:			S	M		T		W		Th		F	s	Total:	3

EVERY MONTH END - #'s for the month need to be in to Allison:

At the end of each month copy & paste the monthly re-cap box into an email and send to your Director for proper recognition, challenges, winning prizes, etc.. Be sure to double check your numbers. The spreadsheet will figure the totals for you.

MONTHLY RECAP TOTALS			
Retail Sales:	\$897.00	YTD:	\$5,695.75
Given Away:	\$60.50	YTD:	\$60.50
Non-Rec. Tax:	\$1.59	YTD:	\$1.59
x 50% - Discount = Profit		\$418.25	
Total GWP (Section 2):		\$38.00	
Selling Appts. Held:	5	Full Circle Appts. Held:	7
Total Classes Held:		1	Total Faces: 7
Total Bookings:	8	Total Interviews:	7
Total New Recruits:	2		

A copy of the Perfect 10 Tracking sheet is emailed out weekly and may also be found on Allison's website.  
[www.allisonsallstars.com](http://www.allisonsallstars.com)