Ezymetics Business Builder - Help

Thank you for evaluating the ezymetics program. We trust this program will assist to you in developing a vibrant and lucrative nutrimetics business.

The ezymetics program consists of three major components:

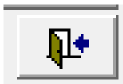
1. The main interface where details are entered, and viewed
2. The Data.mdb file where all the details and records are stored.
3. The Product Update file

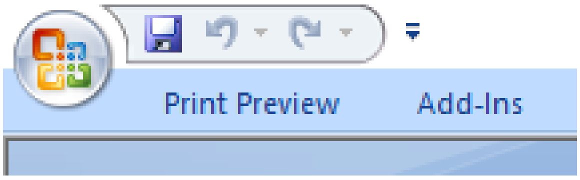
These three components are all located in the C:\ACA directory of your computer

Navigating through the program:
The main interface of the program consists of Forms (where details are entered) and Reports (where details are viewed and or printed.

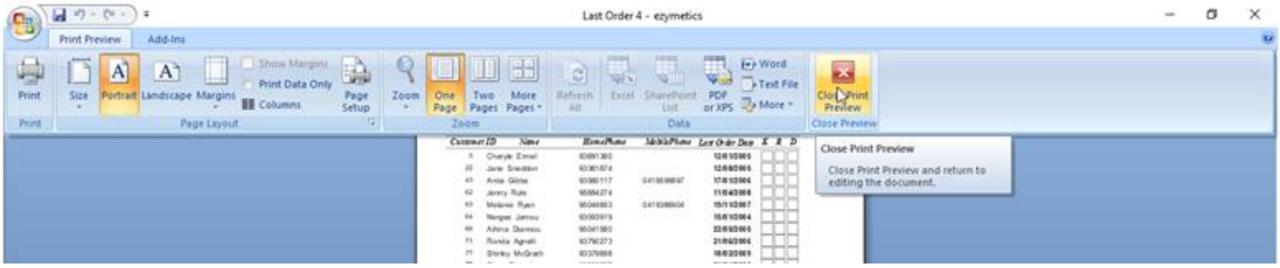
Command buttons throughout the program will open the various forms and or reports.

To close or exit from a form simply click the door button at the bottom right hand side of the form.



To close a report click Print Preview 

at the top of the Report Page this will open a wider menu bar. Then select Close Report Preview



What makes this program so special?
The ezymetics is a program that has evolved over a period of six years and has been Specifically Designed with the help of a Presidential Directorship, several Executive Sales Leaders and many Consultants to incorporate the tools and aids required to successfully maintain and build a nutrimetics business for consultants at all levels.

It is called ezymetics because it makes the bookwork and management of a nutrimetics business EASY.

A major functional advantage of this program, particularly in a business where we continually have changes in the product range and product pricing is that unlike other program such as MYOB or Quicken where we would need to change the product range and product pricing manually with each change in the brochure, the ezymetics program has been designed to simplify this problem by enabling you to receive the Product Update file each month.

The product update file You will receive an e-mail two or three days after the brochure is released, notifying you that the Product update file is available for download from the ezymetics web site, (www.ezymetics.com) simply visit the web site and download the Product update file.
When the Product file is downloaded and extracted into the ACA directory it replaces the existing product file consequently automatically updates the range and pricing within the ezymetics program.

The Product Update file contains the current brochure with the related Cross Over and Early Bird products and accessories it also contains the previous brochure period.
With the click of a button you can choose which brochure period you wish to enter customer orders from

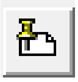
When the new product file is activated it does not affect or alter any existing orders placed by customers

The Product Rebate Program items for Customer Awards are also contained and updated as required from within Product Update file.

Personal Monthly specials: you can easily add your own items to the product list, for example if you create specials packs at various times throughout the year, from stock that you may have on your shelve.
Note: When you add your own specials packs to the monthly product update file these specials will only remain available until the new product file is installed.

Help :

Online video tutorials are available from the ezymetics web site
If you have any questions or concerns that are not answered in this instruction book or the online tutorials, contact Keith Watt on either 9 337 6613 or E-mail keith@ezymetics.com

In various sections of the program you will see  by clicking on that icon related specific will be displayed.

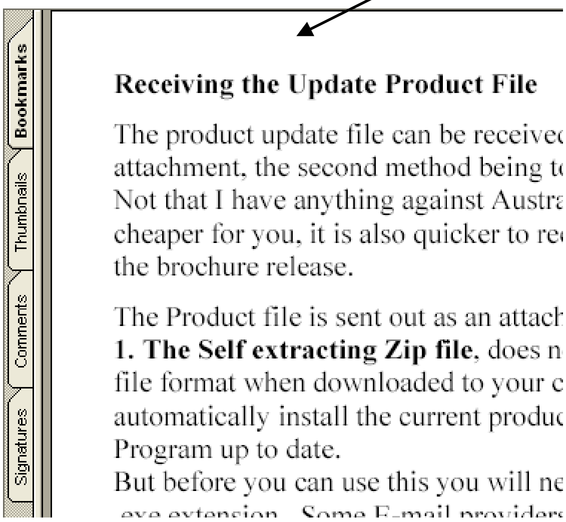
Also within the program you will see  by clicking on this icon you will able to reord descriptions which you can use in relation to the item which the icon is adjacent to.

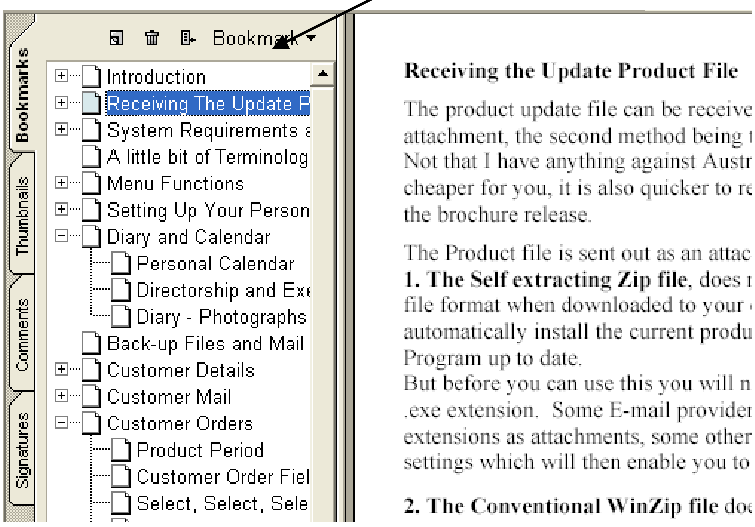
Help File document.

As you are aware the Help Document is an Acrobat Reader file, which can be printed as a personal hard copy document or can be accessed through the Desktop Help file link when required.

When you open the help file, the conventional way in which this file opens is with just the document open, a more convenient method to navigate to the relevant sections applicable to you is to open and display the bookmarks to the various sections, by clicking on the relevant bookmark you will open and display the specific notes.

Help File Sample - Standard opening format. Help File Sample - With Book Marks open.





Date Settings:

It is very important to ensure that your computer date settings are set up correctly

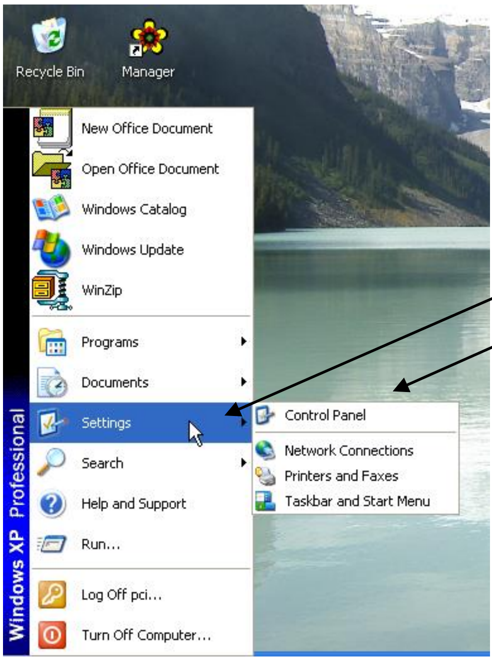
Microsoft is an American company; consequently the default date settings on computers are American format, therefore before using the program you should ensure that the date setting is displayed as Australian date rather than American date Australian date Day/Month/Year, as opposed to the American date Month/Day/Year.

The program has been designed to enter and display dates in numeric format 7/9/03 as opposed to 07-Sept-2003, If the computer is set to America Format it will interrupt that same date as 09-July-2001

If you use the American date display you may inadvertently delete or print a report using the wrong date or in using the program the date in different sections of the program may not display correctly.

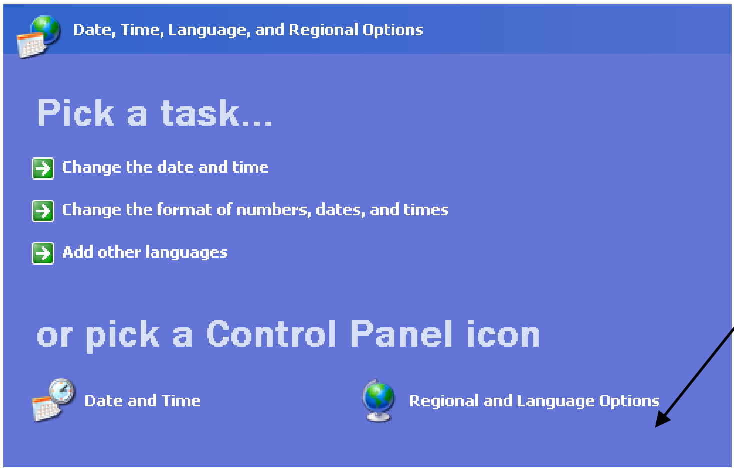
The images displayed may not appear as displayed due to variations in Windows Versions but it will enable you to alter the date settings through the text.

1. From the Desktop, Task Bar or Start button select My Computer - Control Panel

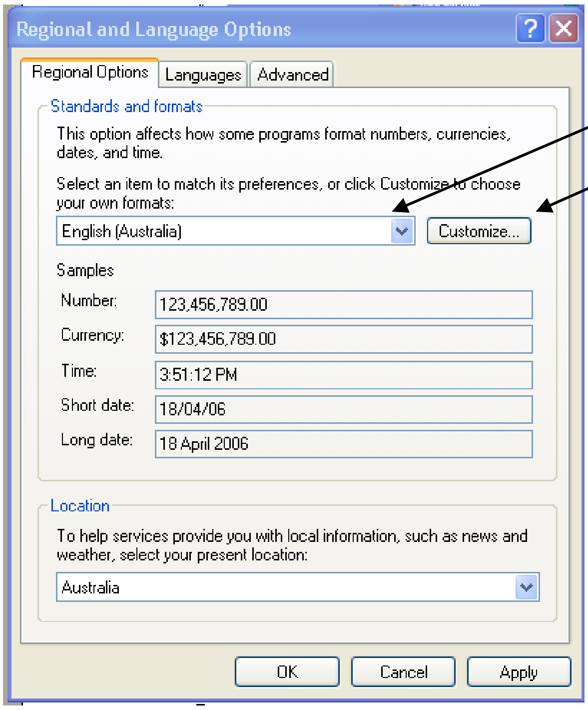


1. Click on Settings
2. Control Panel
3. Regional Settings

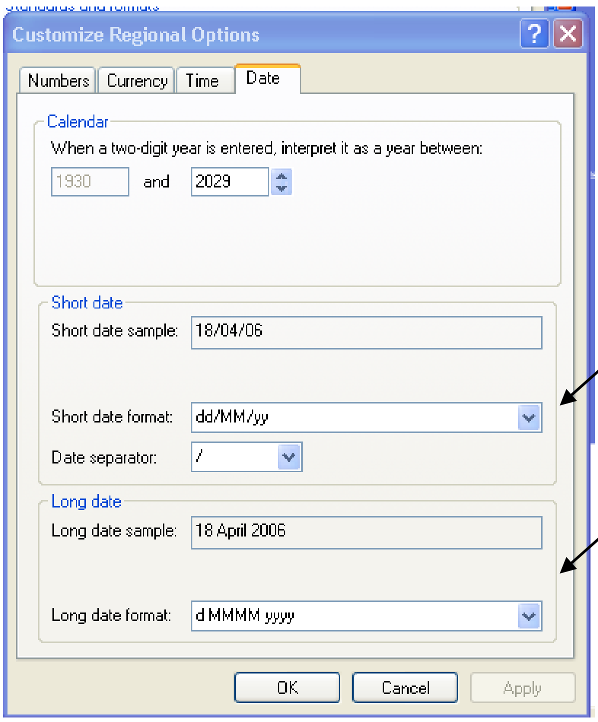
4. Date, Time, Language and Regional Options



5. Regional and Language Options

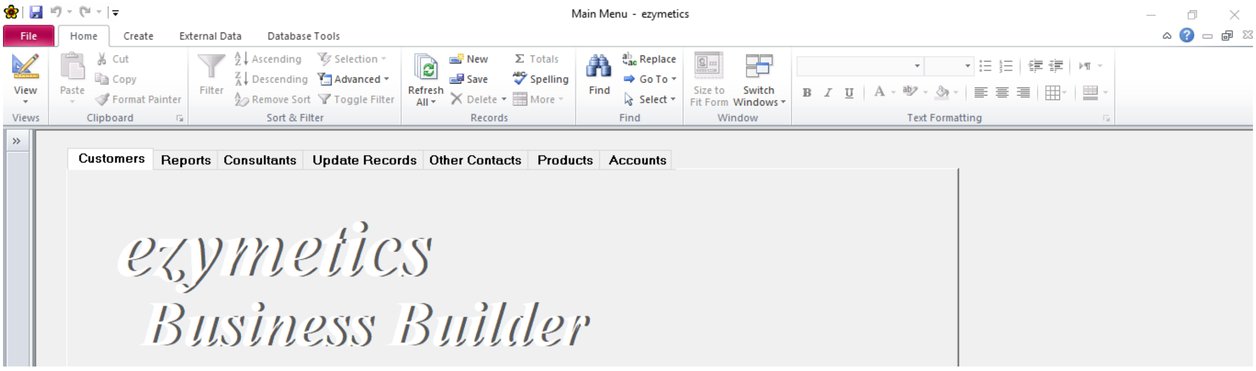


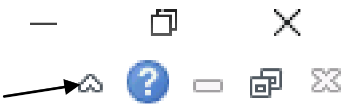
6. Use the Drop down arrow to select English (Australia)
7. Click on Customize



Short Date format
From the drop down arrow
select dd/MM/yy

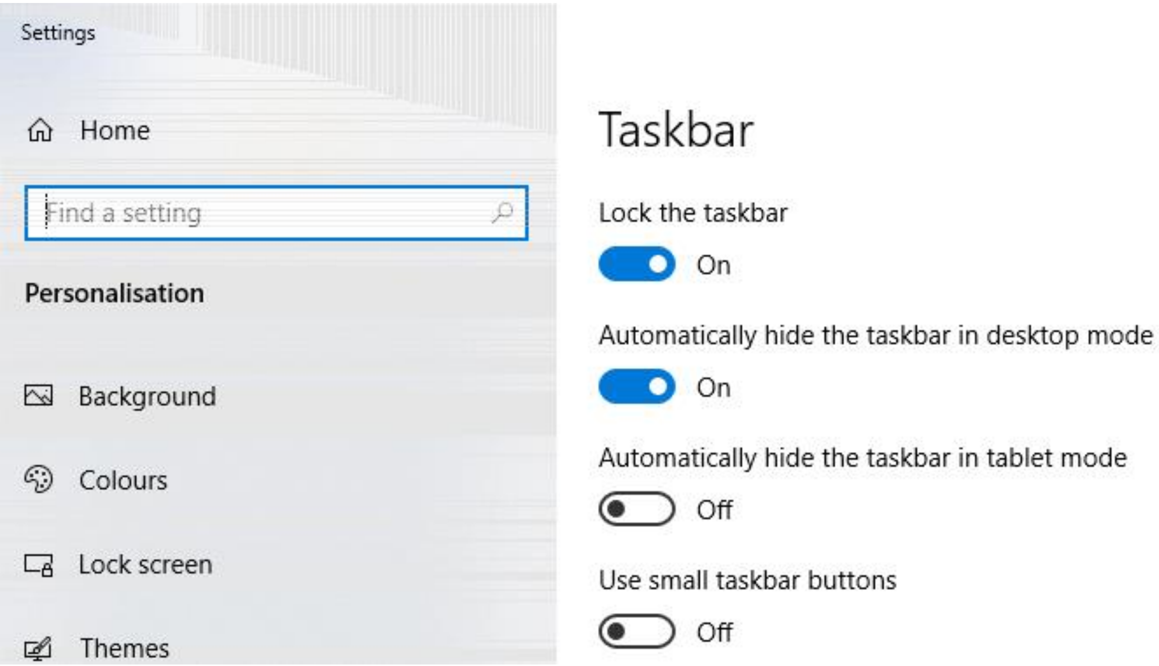
Long date formate
From the drop down arrow
select d MMMM yyyy





If the program opens with a large toolbar at the top, click on
Which is located at top right hand side to minimize the toolbar

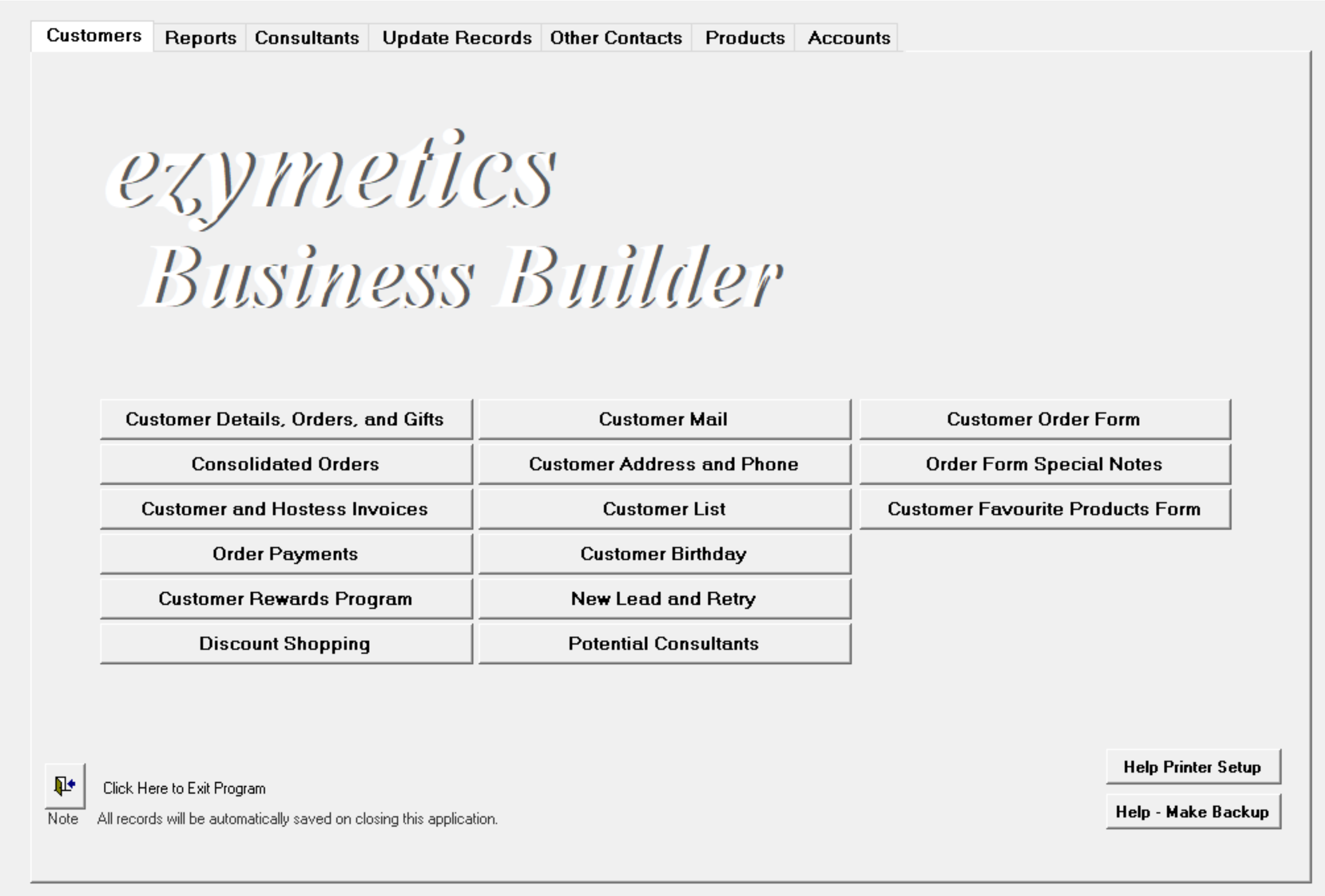
Also to maximize the program screen left click on the bottom taskbar – select Taskbar Settings
Then select automatically hide the taskbar in desktop mode.
This will minimize the bottom taskbar when not in use, but will automatically appear when you bring the mouse cursor to the bottom of screen.



Menu's:

On the next few pages I will briefly explain the primary functions contained within the various Tab Page Menu's.

Customers



Customer Details, Orders, and Host Gifts:

- Setup your customer details.
- Record customer purchases.
- Record Hostess gifts received as demonstration gifts.
- Enter Customer favorite products. Enables notification to customer when the product comes on special price or offer.

Consolidate Orders:

- Print or view customer orders, Consolidates customer purchases for selected period, use this option before placing your order to nutrimetics.
- Print or view customer awards, use this option before bulk ordering for period selected.
- Print or view hostess gifts placed or required between specified periods.

Order Payments:

- Record Customer Payments.
- View all entered payments – which enables you to change the status of a payments; from not deposited to deposited, and delete or exclude payments from reports.
- Print or view payments reports, which can display: – Credit Card payments, Credit cards payments not deposited to nutrimetics account, Payments made by cheque.
- Print or view all payments recorded during specific period.

Customer and Hostess Invoices:

- Enter both customer handling charge and GST registration option.
- Print either specific customer or hostess invoices, which are either GST registered, or plain invoice with the option of either single invoice date or multiple invoice dates.
- Print specific customer invoices with either credit card facility or with out credit card payments
- Print Host Gift statement to include with Host Invoice.
- A Host Note can also be printed with Host Gift Statement.

Customer Awards Program:

- View customers who have placed Brochure Orders.
- Enter items claimed by customers as awards.
- Award additional bonus Points – at your discretion
- View or Print Specific Customer Rewards Report.
- Displays items that have accumulated point’s value.
- Displays any additional points rewarded.
- Display items received or claimed as Customer Reward.
- Displays current Rewards value.

Discount Shopping

- Calculate Specific Sales Value of customers orders during selected period
- Establish discount amount applicable to customer order.
- Record items purchased at discount.
- Print Discount Order Invoice.

Customer Mail:

- Print Bulk Mail: Various Envelopes types e.g. print post, post paid, plain envelope.
- Print Bulk Mail Labels of various sizes.
- Last order Date - Print or view all customers on mailing list who have placed orders since specific date.
- Edit Mailing List. – Alter customer mailing, change if brochure already given, Check last order date by specific customer.
- Print or view Mailing List Report.
- Print various postage labels – Print post, Post Paid, Reply paid, Self Address Label, etc.
- Print specific Customer Mail, either envelopes or sheet.
- Reply Paid Return envelope.

Customer Address and Phone:

- Lookup customers by Home Phone or Mobile number.

Customer List:

- Print or view Customer list sorted by multitude of methods e.g.: Surname, First name,
- Postcode and Phone Number.
- Print or view Host list sorted by surname.
- Print or view Customers list where the Home address is different to the Mail Address.
- Print or view Customer E-mail list.

Customer Birthday:

- View or Print report of Customer Birthday Dates.
- Print Customer Birthday Envelopes by Month.
- Print Customer Letter by Month.

New Leads and Retry:

- New Leads list – Contact, Include or remove from Mail List, Delete record.
- New Leads Report – Print or view all new leads details.
- Retry List - Contact, Include or remove from Mail List, Delete record.
- Retry Report - Print or view all retry customer details.
- Specific Group – Report.

Potential Consultants:

- Print list of customers who you have recorded in customer details as P. Consultant

Customer Order Form:

- Print Customer order form to be included with brochure mail out or demonstrations.

Customer Order Form – Special Notes

- Record and or Edit Order form Special notes

Customer Favourite Products Form

- Print Customer Favourite Product Form
  Distribute this form either at Demonstrations or with mail out of Brochure.
  This enables flagging of product and enables you ring customer when the product is available at either lower prices or larger quantity e.g. two for the price of one.

  As the next two items are very important they are located at the bottom of each Tab Page

Help Printer Setup

As Microsoft Office is an American Program you may need Change printer configuration to set up for Australian Paper Sizes and margins

Help Make Backup

Computers are very good but you can never be 100% sure that your computer will not have a hard drive failure, for this reason it is essential to make a backup on a separate USB drive on a fairly regular basis to enable the restoration of records if required.

You can always download a replacement of the main program interface, if you lose your customer records there is sometimes very little which can be done to restore the hard drive, but if the records are on a separate removal able drive the records can be very easily restored.

Use a removable drive – you never know if somebody could steal your computer, nasty!

Reports

Sales Report:

- A variety of Sales Reports by:
- Category, Product Code, Sales Types, All Customers, Specific Customer, etc.
- Prints Report - Displaying last order date of customers currently on mailing list. And provide tick box to Keep, Remove from mailing list or Delete customer from customer records.

Customer Favorite Product Report:

- Relative to the current brochure - Print or view a report displaying all customers who have asked to be notified when their favourite products are on special.

Customer Contact:

- Print or view Report:
- Link to Original Contact: e.g. Regular Demonstration, Beauty Spa, Fund Raiser etc.
- Select Customer linked to Hostess.
- Select Customer by Consultant: - used if customers transferred to other consultant in your team.

Specific Customer Notes Report:

- Print or view customer details and notes, very handy for printing relevant notes re;
- Address directions, or other information relevant to demonstration.

All Notes by Selected Date

- Print or view customer details and notes when you are not sure of the customer name

Consultants

Personal Details:
- Setup your relevant details: e.g. Product Delivery Details, Mailing Labels,
- Customer Rewards Date, Consolidated Order Date, Invoice Handling Charges, etc.

Print - Mini Brochure Labels:
- Print Mini Brochure labels. - Name and Telephone Number

Print - Mini Return Address Labels:
- Print Mini Return Address labels.

Enter Consultant Details:
- Setup your personal consultant details, and consultants within your team.
- Record consultant training details.

Consultant List:
- Print or view consultant list by level.

Consultant Mail by Level:
- Print Labels or envelopes either: Plain, Print Post, or Post Paid by consultant level.

Consultant Mail by Group:
- Print Labels or envelopes either: Plain, Print Post, or Post Paid by Upline group.

Specific Consultant Mail:
- Print selected consultant envelope either: Plain, Print Post, or Post Paid.

Update Records

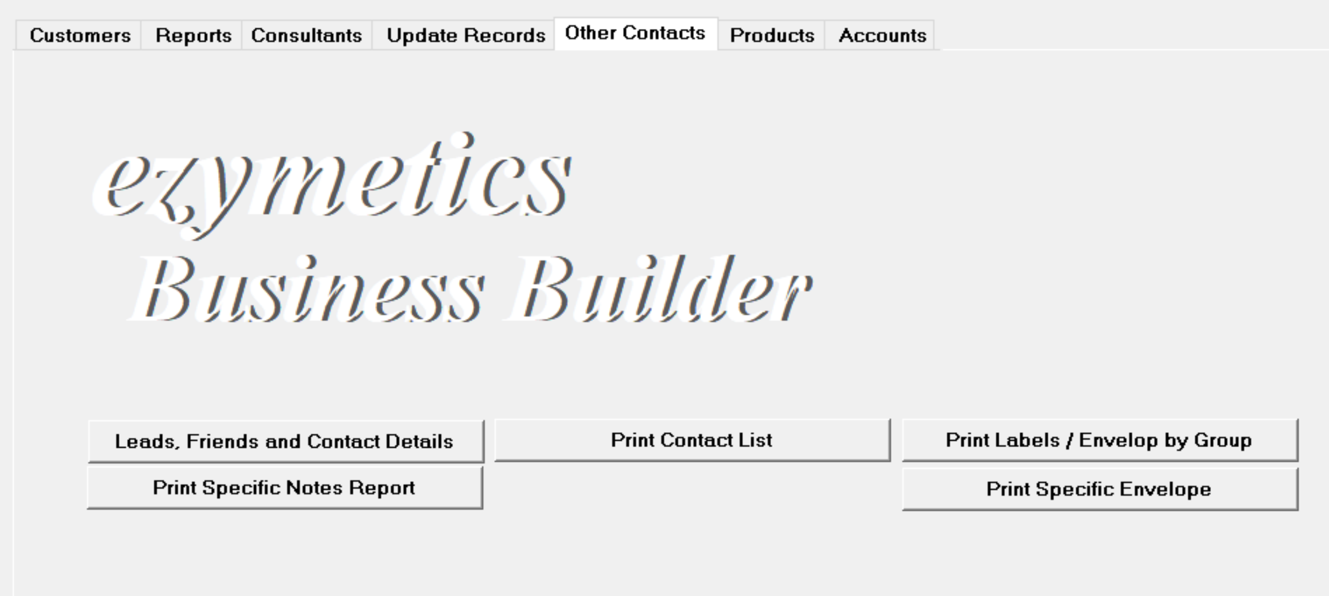
Remove Non Participating Customers:

- If required all selected Non Participating Customer can be removed from your records.
  It is important that non participating customers are removed properly along with any products they ordered

Merge Customer Address to Excel:

- All relevant records can be converted or backed up to individual Microsoft Excel spreadsheets
  Which can be used if required to create a relevant document.

Other Contacts



Leads, Friends and Contacts Details

- Record Contact Details – & contact by, Work or Social friend, Club member, Occupation etc.
- Add Contact Notes.
- Find Friend or Other Contact by search.

Specific Notes Report

- Print or view notes entered for Specific Contact.

Print Contact List

- Print or view All Friends or Other Contacts by selected contact type.

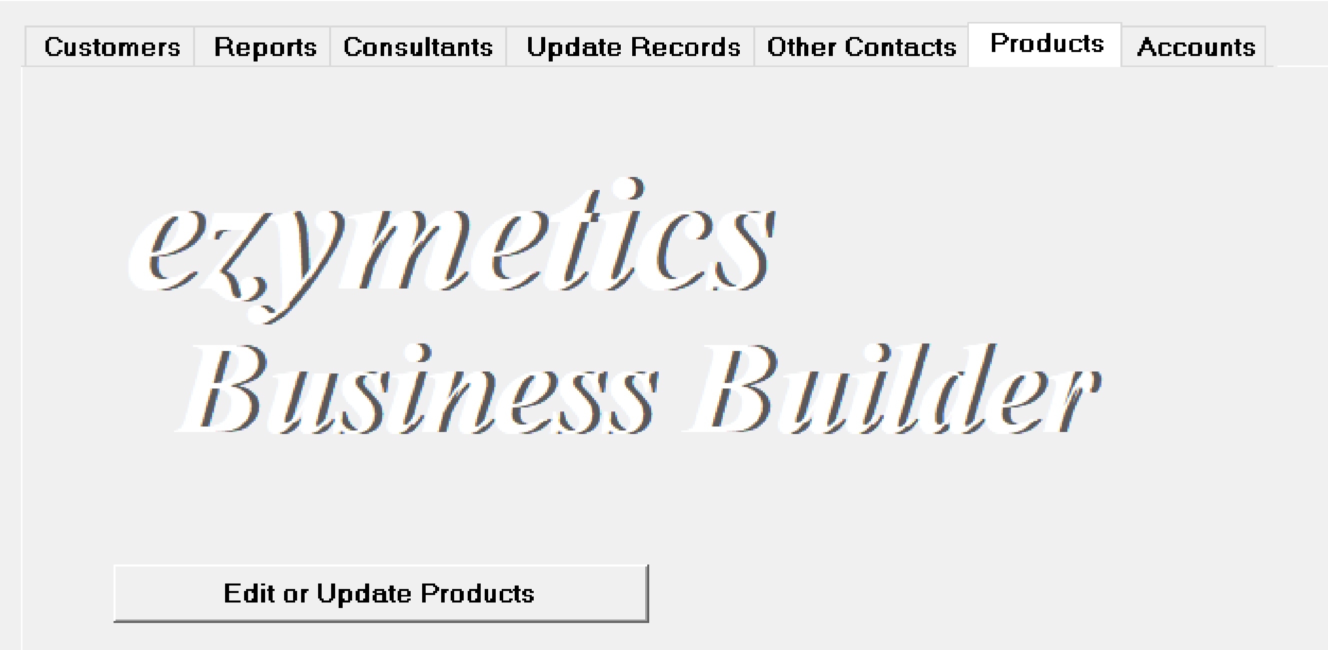
Print Contact Group

- Print Envelope or Labels for all members in selected contact group

Print Specific Envelope

- Print envelope to Specific Contact.

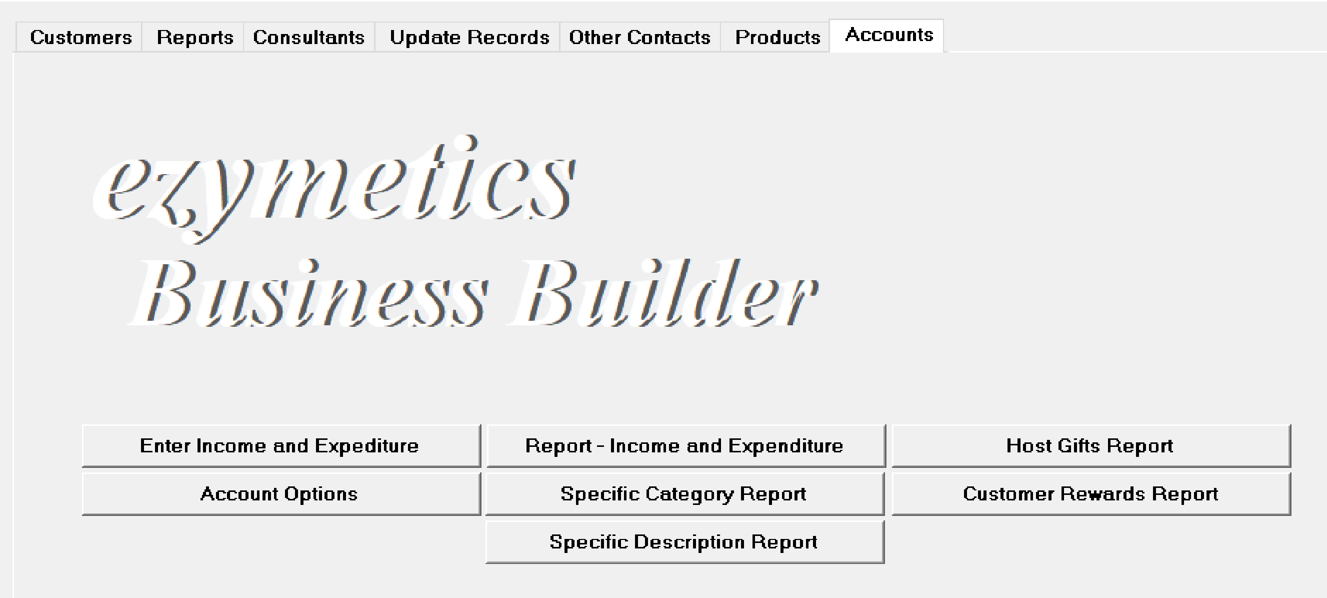
Products



Edit or Update Products:

- Add additional products from stock on hand, or make up specials packs for particular period of year, for example, Christmas, Mothers Day, etc.
  These additional items will only be available until the next Product Update file.

Accounts



Enter Income and Expenditure:
- Enter transaction details: View account balance.

Account Options:
- Edit Account Names.
- Edit Account Descriptions.
- View Chart of Accounts.
- Delete Accounts.
- Edit Payment methods.

Report – Income and Expediture:
- Transaction Summary: within selected period.
- Print or view accounts by Account Types e.g. Assets, Liability, Expenses, etc
- Transaction Detail: within selected period.

Specific Category Report
- Print or view accounts by Account Names: e.g. Photocopying, Postage, Phone, etc
- Specific Transaction: within selected period.

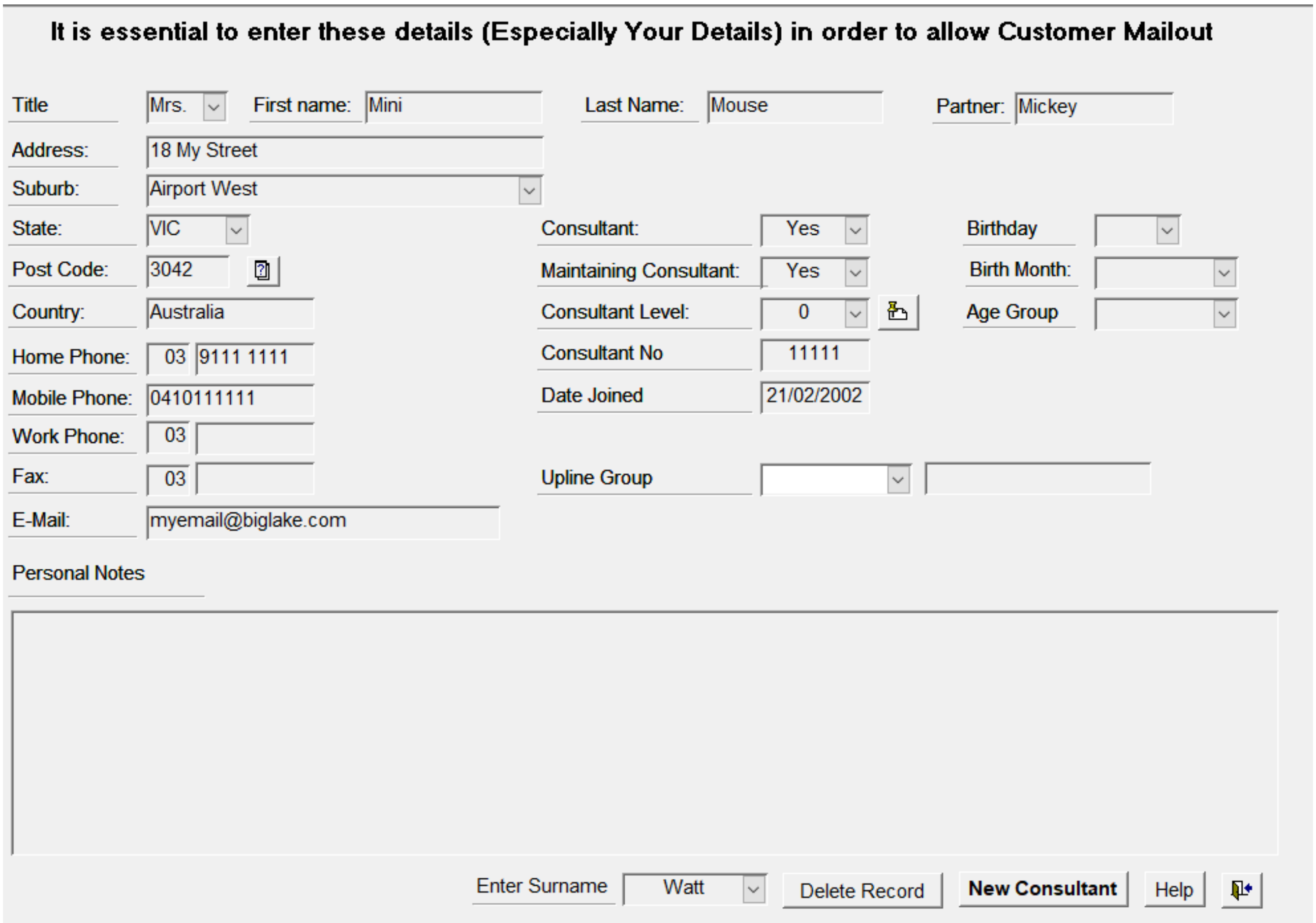
Specific Description Report
- Print or view specific account: e.g. Mobile Phone account

Host Gift Report:
- Print or view Hostess Gifts and Value received by hostess within selected period.

Customer Awards Report:
- Print or view Customer Awards and Value received by customers within selected period.

Personal Details

Having gone through the basic format of the various menu pages, we will now look at setting up your personal details and relevant details that may be required throughout the program.



It is important when entering your details to record your Consultant Level as 0 and then consultants in your team at the appropriate level under you.

By entering new consultant in your team, if required before they install their own version of the ezymetics program you can record their customer names and order under the new consultant name and a print their mailing envelopes or labels for them.
If the new consultant decides that nutrimetics is not a suitable career or part time business for them you can link those customers back to you or alternative consultant

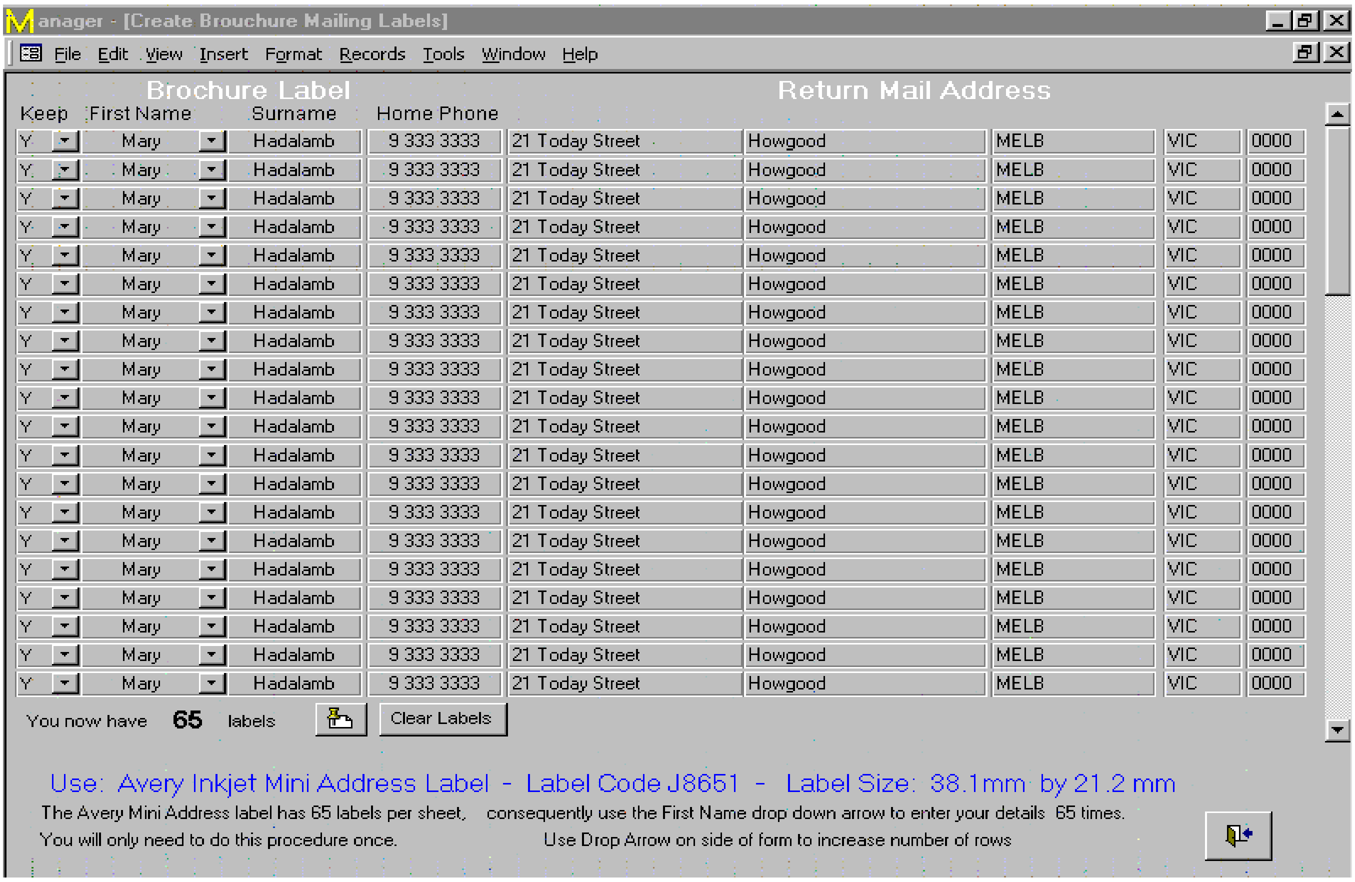
Also initially all your customers will be serviced by you, but as time progresses you may transfer some customers to consultants in your team but if that is not successful you can simply link them back to you.

This consultant details section of the program is not intended to record monthly sales figures as this information is easily obtained through the nutrimetics web site.

Brochure Stamp and Mini Return Address Labels

While we are on the Personal Details Form, let's setup a few personal options; starting with your brochure labels, and mini return address labels. Using a ink stamp gets on my goat, the ink smudges, or not enough ink on the paid, or even stamping in the wrong place, or upside down, done it all, it can be a real pain, and if you buy them already printed when you go to use them you can't find them, or you think you have got enough for your mail out and oops you run out of labels.

So let's print our own labels: Simply use the Setup Mini Labels button on the personal details form. You will only have to do this once, all you need to do is click on the First Name Drop down Button 65 times, there is a counter at the bottom of form to count the number of times you have entered you name. But be careful on the number of times you use the drop down button as the counter at the bottom of the form will not count the last entry until you have actually moved to somewhere else on the form. If you accidentally include too many entries simply select the right hand column and change to N this then select Clear Labels, only the entries set as N will be removed.



This will produce labels suitable for attaching to back of Specials Brochure.
Nothing fancy but at least the person reading the brochure will know whom to contact the ink wont be smudged, or be to faint to read.

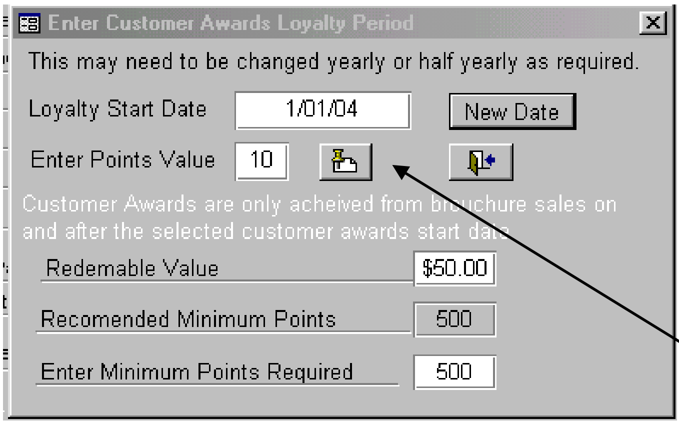
This form also setups your return address on envelopes and mail labels.

Mary Hadalamb
9 333 3333

Customer Rewards Period

As the form suggests it enables you to establish the start date from which you would like to record products purchased by customers who purchase through the brochure as part of your customer mail out, and as such you can reward the customers for their loyalty to you.

In establishing the point’s value you are actually DIVIDING the Sale value by the Point’s value.
So don’t make the mistake of offering fewer points when you actually want to decrease the awards value.

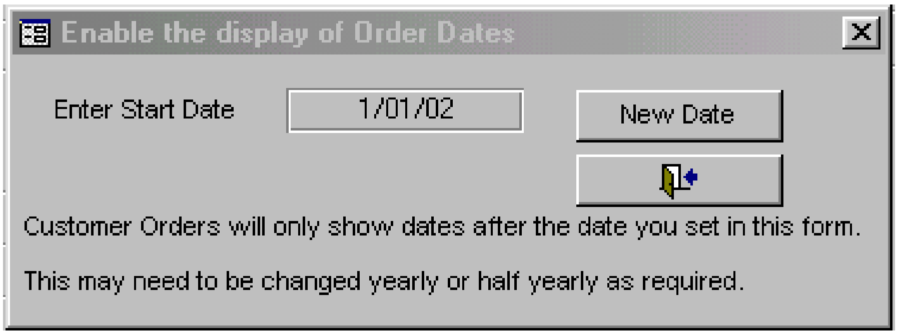


Dividing a dollar by the point’s value.

4 Point’s = 25 cents per dollar spent by customer.
5 Point’s = 20 cents per dollar.
6 Point’s = 16 cents per dollar.
7 Point’s = 14 cents per dollar.
8 Point’s = 12.5 cents per dollar.
9 Point’s = 11 cents per dollar.
10 Point’s = 10 cents per dollar.
Read the attached help in relation to Points Value

Consolidate Order Date

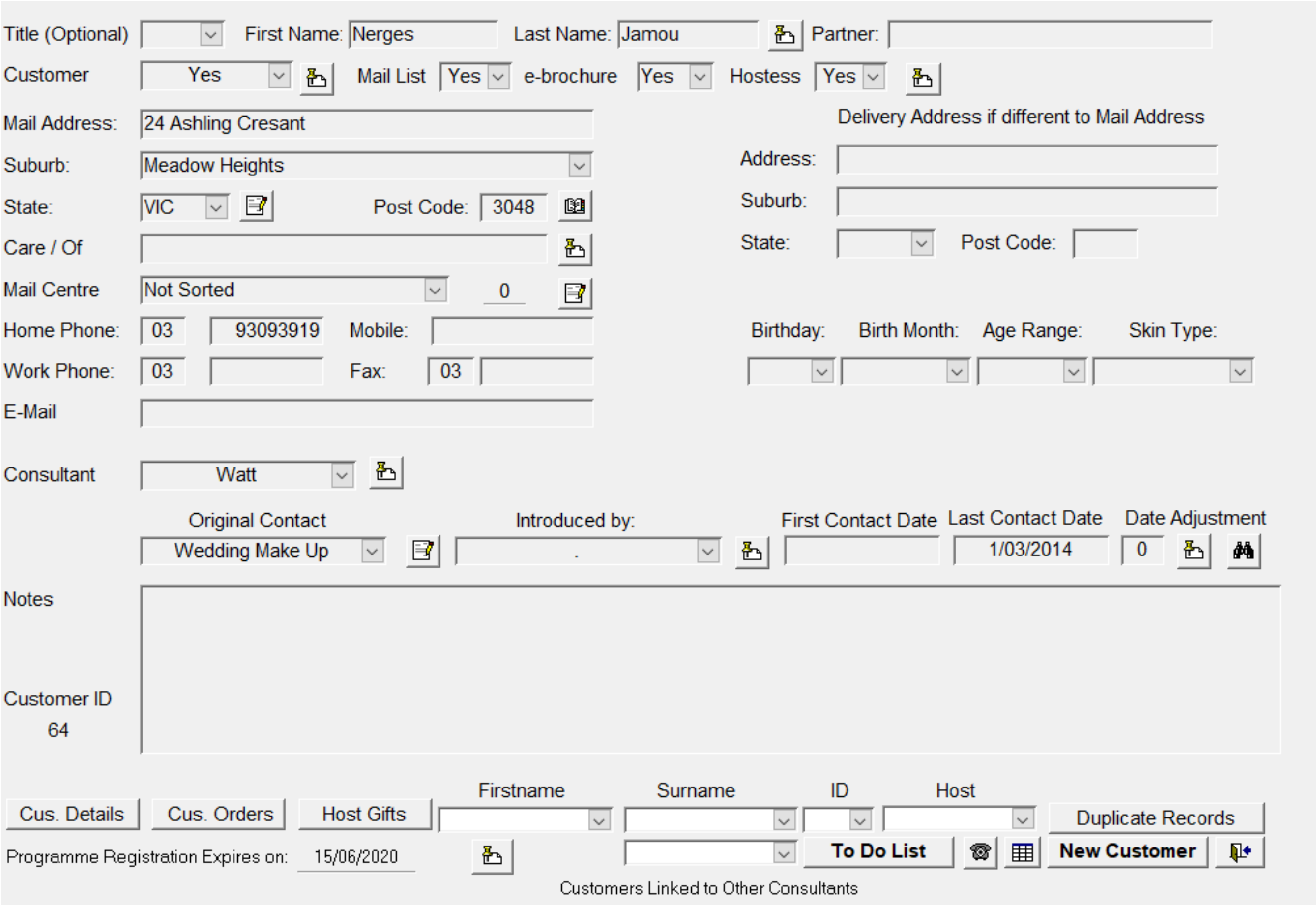
You can keep customer purchase records as long as it suits you, you may have a customer ring you up and ask you the colour that she selected for an item several years ago, to enable you to give the customer that information you can filter all products purchased by a specific customer between a specific period.



You don’t want to be confronted with all the previous dates when you don’t need them; consequently the program uses the Start Date as part of several filter factors in different sections of the program,
The Consolidated Order Periods will only display dates after Consolidate Order Start Date,
When you are entering Customer payments the program will only display names of customers who have placed orders after the Consolidate Orders Start Date, etc.

Entering Customer Details

To enter customer details use either the Customer Menu, and select the command button: Details, Orders, and Host Gifts, or from the Toolbar Menu select Customers\Customer Orders, either will open the Customer Details form.



Customer Details

The first customers we need to setup are our Hosts because we want to be able to link the customers at the demonstration with the hostess. The linking of customers to hostess will also enable the printing of a hostess invoice, which shows all customers who purchased items via the specific hostess and specific demonstration. The Host invoice displays all customers, their individual orders and amount applicable to that order.

The hostess invoice will assist the hostess in the collection of money due by the customers and confirmation of orders and the distribution of products. The invoice will also display the delivery date.

And you can include a brief note at the top of the invoice, which may assist you in many ways.

Only customers who have been entered as a Host will have the option to record Host Gifts

Linking Customers to your Consultant Number

When you enter either the first name or the last name of the new customer, your name should appear as the consultant, after you have entered consultants in your team through the Consultants menu, you can change who that customer is serviced by, by simply selecting from the drop down list. Customers that are not linked to your consultant number will not be available for mailing envelopes, labels or mailing sheets.

Customer Status

In the Customer field we have the option of (Yes, No, New Lead, Retry and Potential Consultant)

- The customer is a customer, (Yes)
- Does the customer want to be included on the mailing list (Yes or No)
- And is the customer a host (Yes or No)

New Lead and Retry Customers.

New Lead

You have just met a new potential customer; you could write all the details down on a scrap piece of paper or better still in your diary, but when you go to ring the potential customer you have to find the scrap of paper, or sort out the details in your diary because you have meet a few new people recently and you are not quite sure where in your diary you wrote the note, it can be a bit of a nuisance.

Alternatively, enter the potential customer details in the Customer Details section of this program, while the details are still fresh in your mind.

By selecting this option enables you perform two procedures:

1. It provides you with a separate report that will collate all the new leads into one list rather than having to look through you diary to find the relevant details.
2. It also creates a form, which enables you to quickly remove New Leads if the person decides not to either purchase product, or look at the business opportunity, or have a fundraiser, etc.

To enter the new lead details use the Customer Details, Orders, Awards and Gifts form, but instead of accepting the default value in the Customer field (Yes) select (New Lead). Latter if they do decide to become customers it is a simple task of changing their status to customers (Yes).

A Retry customer

If a customer has not purchased any items for some considerable time, and you may be considering removing them from your customer records, but before you remove the customer give then another try.

Select the customer and change their customer status to (Retry), this will enable you to print a report displaying those particular customers, which may be helpful both in reminding you to give them a call, or to include a special note in the next brochure mail out.

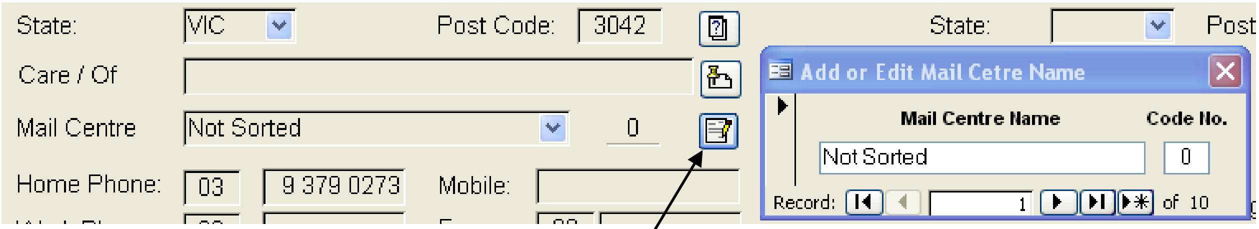
The Retry Customer list will enable you to delete retry customer easily if they decide they do not wish to be include on your mailing list, of they do not place an order after a reasonable period of time.

Potential Consultant

Some customers purchase significant quantities of nutrimetics products and often sell through the brochure to their friends and work colleges, this enables them to both help their friends to obtain nutrimetics products when they are on special and it also builds up their own customer rewards points.

These customers may like to earn money by selling nutrimetics products as a consultant, by selecting these customers as potential consultant a separate report is available to view or print of these potential consultants for you to follow up with.

Mail Center:
To enable cheaper postage rate, when entering the customer details the option is available to select a mail postage center, this will print a number on the envelope or label to enable sorting by mail center.
In addition we often hand deliver the brochure or other mail to our customers, to make sorting the mail to be hand delivered easy, use the mail centre option and select (Personal Delivery) as the mail center.
To simplify sorting, the labels, envelopes, A5 or A4 sheets will automatically print in mail center sequence and in postcode sequence.

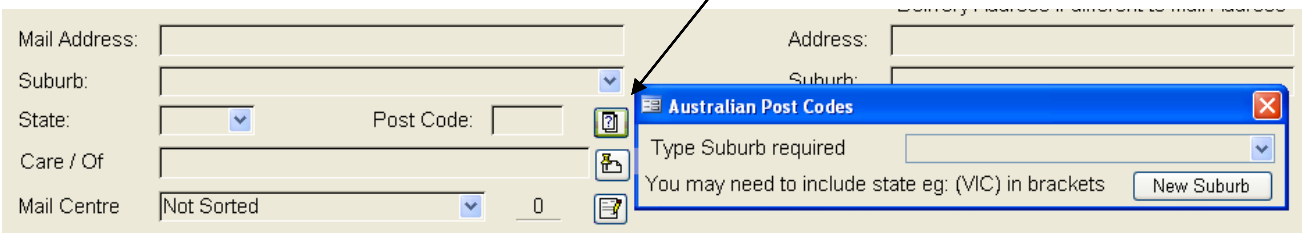


To change the names of the Mail Centre's click

If you change the names of the Mail Centers it is important that you leave Not Sorted as Zero

If you do not choice to sort your mail, no number will be printed on the label envelope, etc. The mail will then be sorted by Postcode only.

Post Codes
To find the post code of a customer address simply double click on the question mark icon

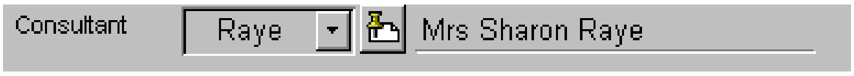


There are 14239 suburbs listed in the program, but as new suburbs develop you can enter additional suburbs and postcodes in the list by clicking on the New Suburb button.
Once a suburb and postcode have been entered and the customer details section closed and reopened, when you type the same suburb in the suburb field the postcode will be automatically inserted in the postcode field, it is important to type the suburb the same way each time,
example: East Keilor – Keilor East, or North Melbourne Nth. Melb. consistency is important.

Care / Of:
Sometimes a customer mail address may be related to a Business address, to include the additional address line use the Care/Of field, this additional line can only be added to A4, A5 Sheets, envelopes or similar items, they can not be added to labels due to the page layout format required for labels.

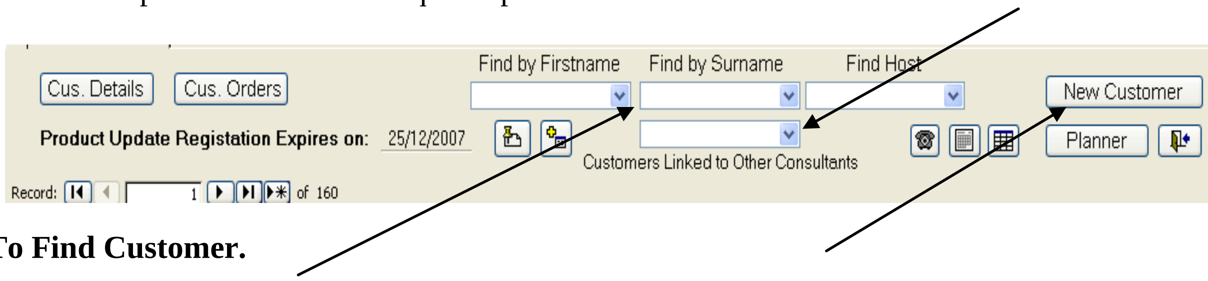
Different Delivery Address.
The customer mailing list is linked to the initial customer address on the left hand side of the form, but a customer may have a different delivery address.
If you enter a different delivery address to mail address – when you print customer or host invoices the delivery address will be printed on the invoice otherwise the mail address will be printed on the invoice.

Consultant Field



A customer may become a consultant and you may wish to transfer customers that are friends with that particular new consultant, to enable you to do this once you have enter the new consultant in the consultant details section of the ezymetics program, simply click at the bottom of the customers email address, use the drop down arrow or enter the surname of the new consultant, that customer will automatically be removed from your mailing list while they are linked to another consultant.

If the new consultant decides not to go ahead in the nutrimetics business you can print a report of customers linked to other consultants, enabling you to restore those customers back to your customer list. Also if you wish to find or look up the details of a customer who has been transferred to another consultant in your team, use the lower lookup arrow to find the required person.

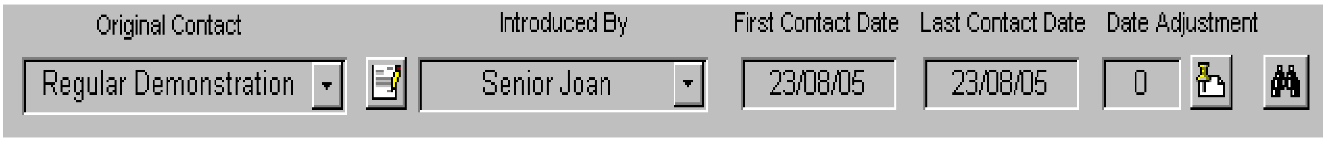


To Find Customer.

Enter the surname and first name of the required customer and press the enter key,
Or use the drop down arrow to select the required customer, if you have two or more customers with exactly the same name, use the drop down selector and choose by Customer ID.
Alternatively use the record select arrow at the bottom of the form to select the required customer.

If the customer is a new customer, simply select the [New Customer] button.

Original Demonstration.

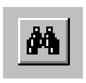


Where and when did you first meet this customer?
To keep track of customers by where you first meet them, for example Beauty Spa demonstration, Fund Raiser, Regular Demonstration use these fields to enable you to print a customer reports by specific demonstration type. You can also generate your own demonstration types, Color, Household cleaning, Skin Care, etc, simply click on the note pad icon next to Original Demonstration field.

It is important to select the person who introduced the new customer from the drop down selector, as by using the selector it links the customers by Customer ID, if you simply type the full name customer who introduced this customer to you, the customer will not be linked; as such always enter the details of the person who introduced this person to you first.

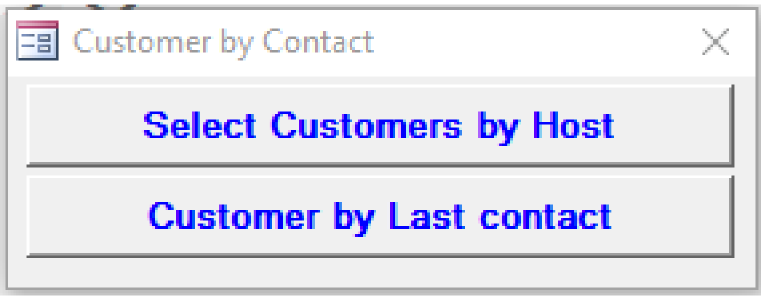
First Contact:
Enter the First contact date by double clicking on the field, use the Date Adjustment option if required to back date the current date.

Using this feature will also assist you in booking further demonstration, ask a customer from that demonstration, remind them who was with them at the demonstration, suggest possibly an alternative demonstration type.

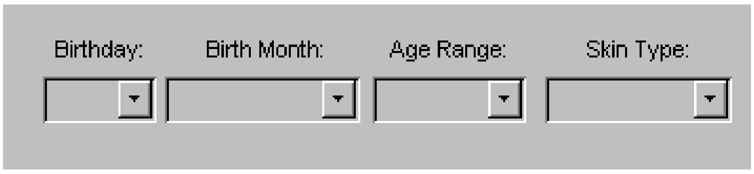
When was the last contact with this customer?

Double click on the last contact date, adjust the last c riodically as contact is made with that customer, this will provide a form listing all customer in ascending order of last contact, click on the binoculars to find customers by last contact date. The person at the top of the list will be the person that you spoke to or had contact with the longest period ago, and perhaps you should contact them next.

Customer Notes – Report by last contact.
If you enter notes in the customer details notes field then double click on last contact to activate that date, Then from the Reports Menu select All Notes by Selected Date this will enable you to print or view notes recorded on and after the date selected, a very handy function in lots of situations, for example: Delivery details, Directions on how to travel to customer's home, or other special information in relation to that customer.

Customer Contact
Use the Reports menu click on Customer Contact, this will enable you to view or print a variety of customer contact reports.



Birthdays



You may wish to send your customers a birthday card or a special gift voucher for their birthday, or offer them a free skin care facial treatment.
To enable you to print a birthday report and envelopes for specific month, use these fields to record the required information.
You only require the Birth Month to enable the sorting for the report, but if you want to put the report in descending order you will need the Birthday. Age Range and Skin Type are optional.

Customer Notes

The customer is the most important part of the business, we know that we are selling great products, but if we believe that the product is the most import object we are doomed for failure. We need to care about our customers, to make them special, to treat them in the way in which we like to be treated. We need to build and maintain customer relationships, without customers we haven't got a business.

Know your Customer
Don't just send them another brochure, give them a call, tell them that you were thinking about them, how was you trip, did your little boy get over the illness, has your skin improved since using particular product, how did your daughters wedding go?

Get to know your customers, and they will get to know you as a friend whose career or part time job happens to be having nutrimetics demonstrations. Perhaps they could join your team, because you always seem to enjoy it so much when you have a demonstration. It looks like fun, not work, you work the hours that best suit your needs, and you can get a company car to drive as well.

If you have kept some relevant information about the customer in the customer details section, a quick reflection on those notes before you make the phone call will enable you to reflect on some item within the customers history that may help you to create the goodwill and harmony between the customer and yourself, which may assist you in making a demonstration booking.

Future Orders

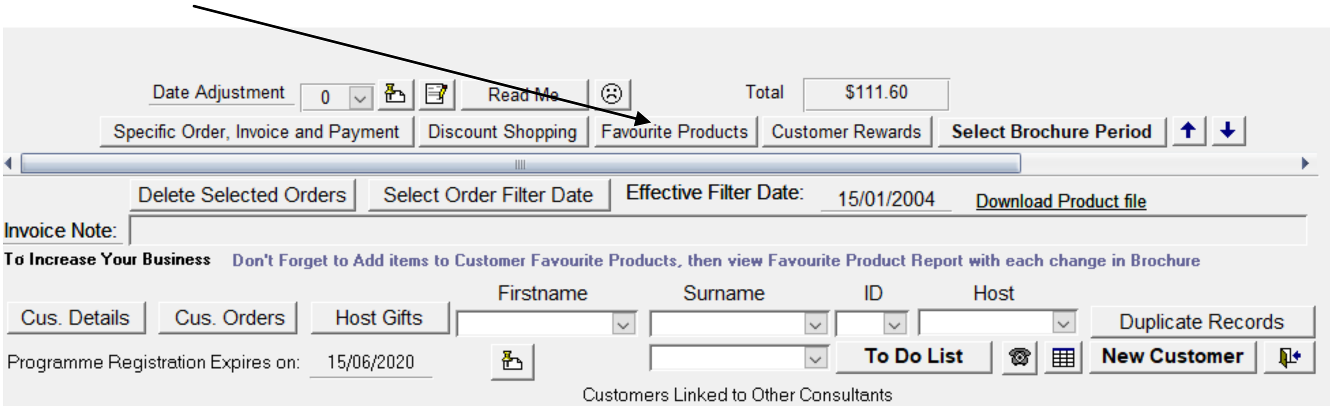
We need to know which customers are buying which specific products, by comparing the products specials with the products order by customers and the date that they last purchased the particular product can give you the correct time to suggestion to the customer that they might like to purchase the product again while it is on special.

Use the Reports Menu – Sales Reports – Sales by Specific Product Code, Note - only products that you have sold to a customer or customers at some time will be available for selection.

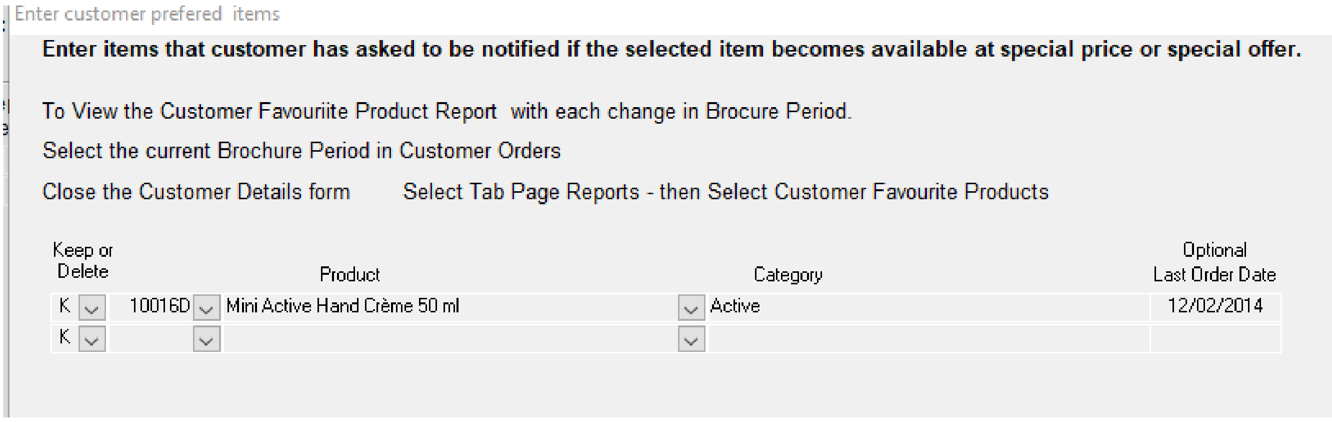
Favourite Products

Alternatively rather than looking through the customer history in sales reports – if a customer tells you or has other wise indicated that they really like a particular product, record the customers favourite products by using the options Customers Favourite Products .

Favorite Products are entered via the customer order section



Use the drop down selector to record the required product and enter Last Order Date



Products are linked by product by product name and category with each change in brochure update when that product is on special it will appear in the Reports section – Customer Favorite Products report linked to the customer name

Simply notify them and you should have an instant sale that product and possibly other products

To Enter Customer Orders.

Use the Customer Menu – Details, Orders and Host Gifts – Cus. Orders

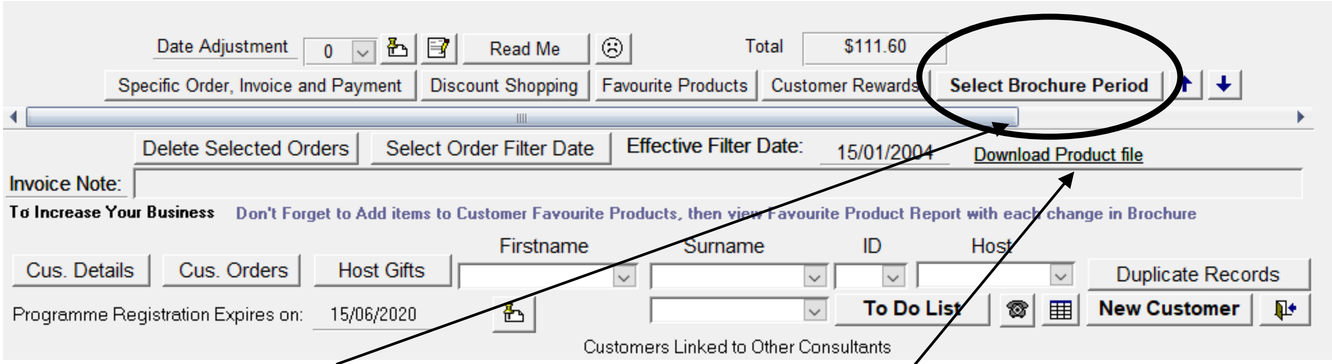
The essential thing to remember when using this section of the program is that we are not creating a simple invoice that records one or more items purchased by a customer on a specific day.

We are creating a more complex recording and reporting system to accept the following situations:

- Customers who purchase on several occasions.
- Customer may purchase at a variety of locations, e.g.: various demonstrations held by different host, or may host their own demonstration, or purchase from the catalogue by phone order.
- Items purchased by customer may be on back order.
- Tracks Customer Rewards –as part of your customer mail out:
- Link the customer purchase to a specific host and demonstration; this will enable calculation of hostess benefits.
- Sorting products sold and at specific types of demonstration, Regular Demonstration, Beauty Spa, Catalogue Sale, and Fund Raiser. This will show the amount sold through each sales type enabling you to evaluate the cost effectiveness of your customer mail-out, or fund raising expenses, etc.
- Enable the removal of an item or items if the customer returns the product or decides not to purchase product for some reason.
- Collation of all products sold over a specific period – to enable easy online ordering.
- Sorted report of all products sold over a specific period and to whom the product was sold.
- Report of customer purchase on specific date, will enable specific customer invoice to be printed.
- Report of all customers purchasing at specific demonstration, this will enable host invoices to be printed.
- Filter specific order to enable customer payments to be recorded.

Product Period

As we know nutrimetics changes the specials brochure monthly and in addition we have the cross over days and the early bird days to consider. By using the product update file, which can be received either as an e-mail attachment or through regular mail service, keeps the product range within the program up to date, and makes selection of the required products very easy.



Prior to selecting any particular customer order, you should select the Brochure period on the bottom of the customer order form, as after you have selected the brochure period the customer order section will close and then re-open again at the first customer in your record, you then select the required customer and enter their order from the selected brochure.

If you did not receive an email to inform you that the latest product file was available and it well past the 16th of month, click on the Download Product File

Customer Order Fields

Lets look at how we use the various entry fields on the customer order form

A/B Available or Back Order: The default setting is A - (Available) if when you place order to nutrimetics you find he product is on back order, you may wish to produce a report of customers with items on back order. Reselect the customer and the item ordered, use the drop down arrow to select B, (Back Order), this will display a new field where you can insert the back order reference number supplied by nutrimetics.

Keep Delete: the default setting is to keep the order, normally you not have to change the keep Delete field unless you entered a product to be purchased by the customer, the order total would be effected, if for some reason the customer decided shortly afterwards not to purchase that product you would need to remove that item from the order.

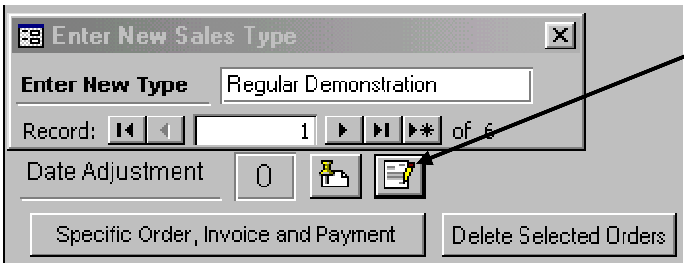
Simply change the field to D for Delete, and then select the Delete Selected Orders button.

This will close the Customer Order form, remove the selected item or items, and then return to the customer details form. If you want to continue editing or adding details to that customer you will need reselect that customer in the find customer field (Enter Surname at bottom of form).

It is essential that there is only one blank line at bottom of order form, and that all orders contain: Date, Qty, Code, Range, Product Name, Unit Price, Bonus Value, Special Offer and GST, if any section is left blank errors can occur in various reports. **Read the Read Me in the Order Details section**.

Hostess Name: to enable the printing of a host invoice, which will have all the customers who purchased items at that specific demonstration referenced by date, this will enable the host to collect any order money due, and although the customer orders will be packaged accordingly it will confirm if required that the customers receive the products they ordered.
It will also enable a report of customers associated with specific host, when you make a call to the host at a future date to ask if he or she would like another demonstration, you can reflect on the customers who where at the previous demonstration.

Sale Type: To enable us to filter and create a report on the amount of product sold through specific sales types, we need to use the drop down selector arrow to select the sales type, alternatively we can enter the sales type number e.g. 1 Regular Demonstration, 2 Catalogue sale, 3 Beauty Spa, 4 Facial, and 5 Fun Raiser.



To add to the sales types simply select the Sales Type button

Do not change the second type – Catalogue Sale as this item is used to filter products purchased in regard to Customer Rewards Program

Date Sold: the date the customer purchased the particular item.
Ensure that the date format on your computer is set as the Australian Date system as explained earlier.
If you double click on the date field the current date should automatically be inserted.
If you wish to alter the date to a previous date, for example you know you did the demonstration or took the order two days ago, use the Date Adjustment to subtract the number of days from the current date when you double click on the Date field.

Qty: Quantity, the amount of a particular product that the customer requires to purchase

1	18153	Botanicals Green Tea Range	Face Hydrator 60 ml	$6.00
1	18150	Botanicals Green Tea Range	Body Lotion 150 ml	$6.00
1	18011	Botanicals Range - Cleanser Toner	Grapefruit Crush 175 ml	$10.00
1	151679	Clear Range	Clean and Clear Skin Set	$56.00

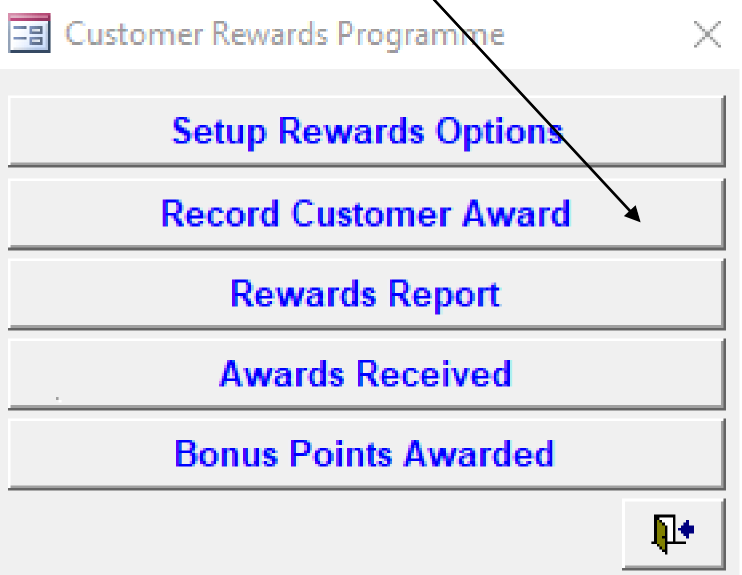
We have several options at this point on selecting the product that the customer requires

Code: Simply enter the product code. You will usually find that you need to only enter part of the product code and the program will make a suggestion to possible product, if the first suggestion is not correct simply keep entering product code numbers. If you enter a product code and the Range and Product Name do not enter automatically – please recheck the product code that you entered with a current nutrimetics order form or brochure. Be aware that the item may be entered several times with different prices depending on the brochure and the specials deal, as such check the price as you enter each item, the cheapest price should always appear first when you enter the code.
Alternatively if you are not sure of the product code number you can use the Drop down arrow next to Product Code to search and select the required product. Or enter the name of the product in the Product Name column, or use the drop down arrow to select the product name.

If you want to make specials packs example: from accumulated products on your shelve, you can also add these through the update product form. Use the update product form from the Update records menu to add the product to the product list. These special pack will only be available until the next product update file.

To record the value of previous orders (purchased prior to using this program): Select the Sale Type as Catalogue Sale, record the date to which those orders apply, enter the quantity as 1, then use the product code AP (Accumulated Rewards Points) then enter the total value of those previous orders.
Ensure that if you are entering previous rewards points, do not use the same date that the customer places an new order, other the amount rewarded will be added to the new invoice for that date.

To claim rewards points: select Rewards Redemption as the Sale Type, enter the Date, and Quantity as 1, then use the Product code CR to Credit Redemption, **before you press the Tab Key or Enter key**, click on the Product Name field, this will enable you to record the item that is being claimed by the customer at no charge.
To complete this procedure you must also record that item through the Customer Rewards Program \ Record Customer Award. Other wise you will not be deducting the rewards claimed from the customers total rewards points.



This will allow you show on the invoice that the customer is receiving an item or items at no price, and when you print the customer rewards report it will display the points accumulated minus the points and items claimed. The rewards report can be printed either as full report or an abbreviate report

Price: is an automatic field, but if you decide to alter the price of the product yourself, to offer a special customer a particular product at a reduced price, simply select the particular product price field and alter the price accordingly.

Total: Is the value of all the items purchased by the customer from the first order date to the current time. When entering the customer orders the total will not change until another row within the form is selected or the order is completed.

Demonstration Orders

If you are entering orders from a demonstration and you have new customers to include in your records, it is best if you enter all the customers at that show in the details section of the program first, before entering any purchases.
Ensure that the required brochure period is active, open any customer order section and check the brochure period (top right hand side) if necessary change the brochure period.

Entering Customer Orders.

Having selected the required customer, select the Host Name if applicable, the Sale Type, and enter the Date sold; The Host name, Sale type and Date sold should also appear below the customer name, these details will remain active while the order details form is active.
Then click on the Qty field, the default value for the quantity amount is set as 1, each time you enter or click on the quantity field the program will automatically enter the value 1, naturally you can alter the quantity amount if required. Having accepted or entered a different quantity press the Tab key again and enter the Product Code, when you enter the product code the item and price will automatically be entered into their respective fields.

You should check the price of the entered product is correct for that order as quite often the product will be available with different prices as per the monthly brochure, the cheapest price will appear first, if it is not the correct price as per the customer order use the drop down arrow along side product code, the same product with different prices will be grouped together and will be the first items that appear in the drop down list, alternatively you can alter the price of the product manually if required.

After you have entered the product code and checked the price, press the Tab key again twice, this will bring you back to the quantity field again.
On activating the quantity field the program will also automatically enter the Host name, Sale type, and Date in their respective fields on that row, the quantity will automatically be 1, which you can either except or alter, then press tab again and enter the required product code.

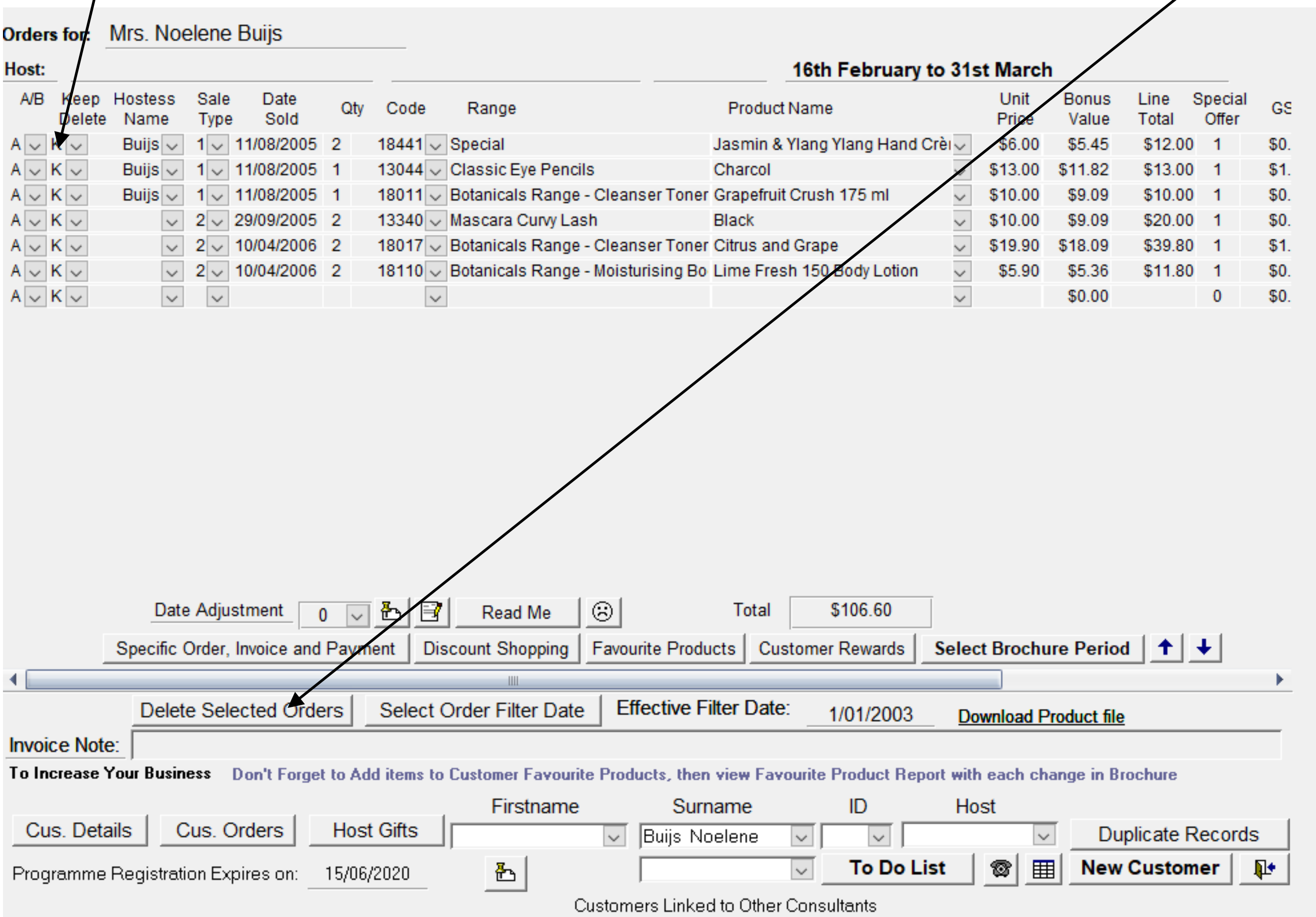
Having entered the last item required for that particular customer press the tab key only once.

While either the Qty or Product Field are selected you cannot change to another customer, this is to prevent you accidentally overwriting details on the first of the newly selected customer, you must complete the order first and either press the Enter key or the Tab key

If you select another customer who was at the same demonstration, the Host name, Demonstration type and Date will still be active, simply select the Qty field and Host name, Demonstration type and date will enter automatically, then simply proceed with the order as normal, this is the reason why you enter the customer details for all the customers at a particular demonstration before placing the orders for those customers, it makes linking the customer orders to the host much quicker and very easy.

If you select another customer who was at a different demonstration but the same date simply change the host name, if the customer purchased from the brochure simply delete the host name.

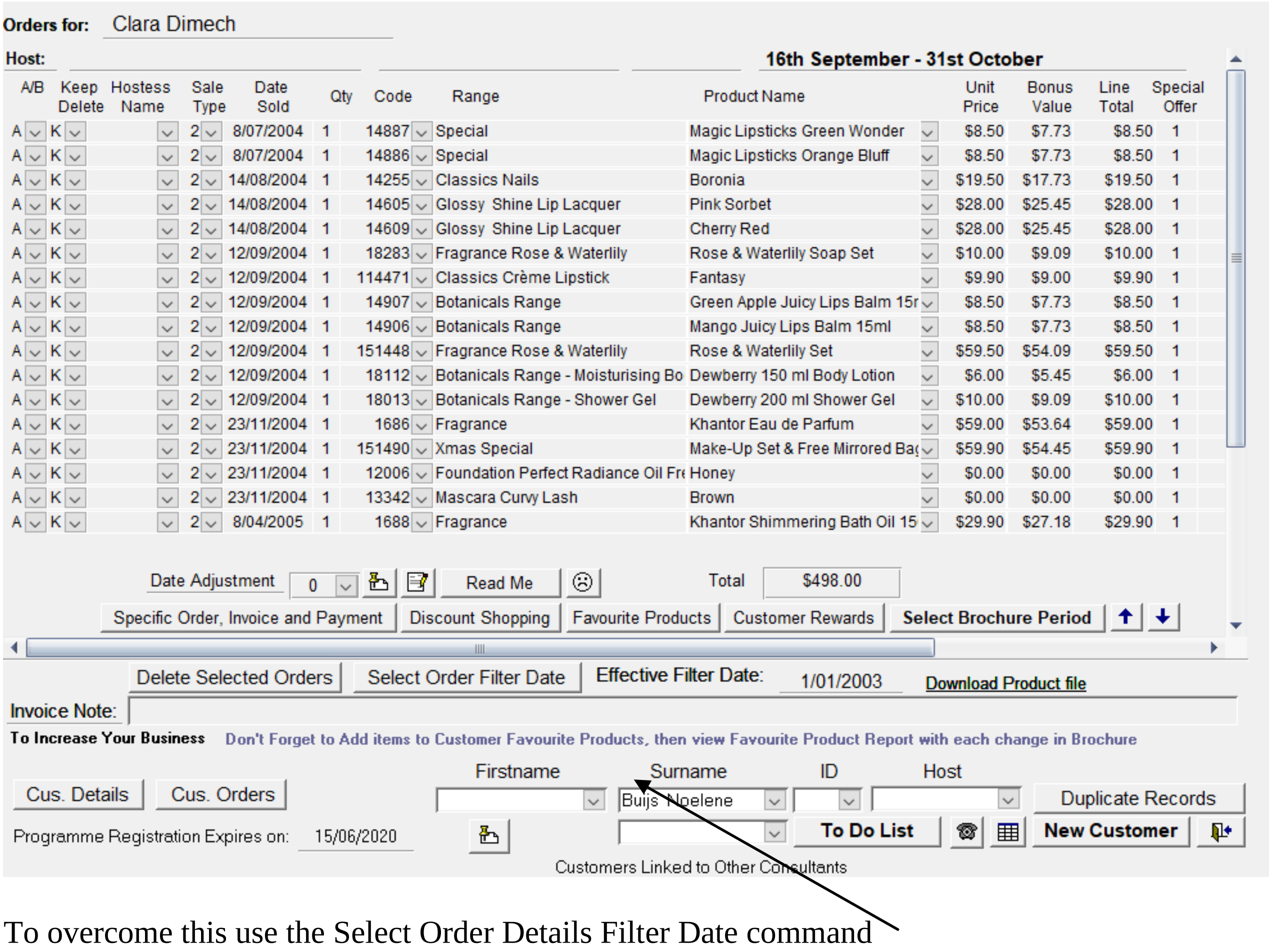
If you make a mistake and press the tab key more times than required, simply select the Keep Delete drop down and then use the Delete Selected Orders - located at bottom of customer odes form.



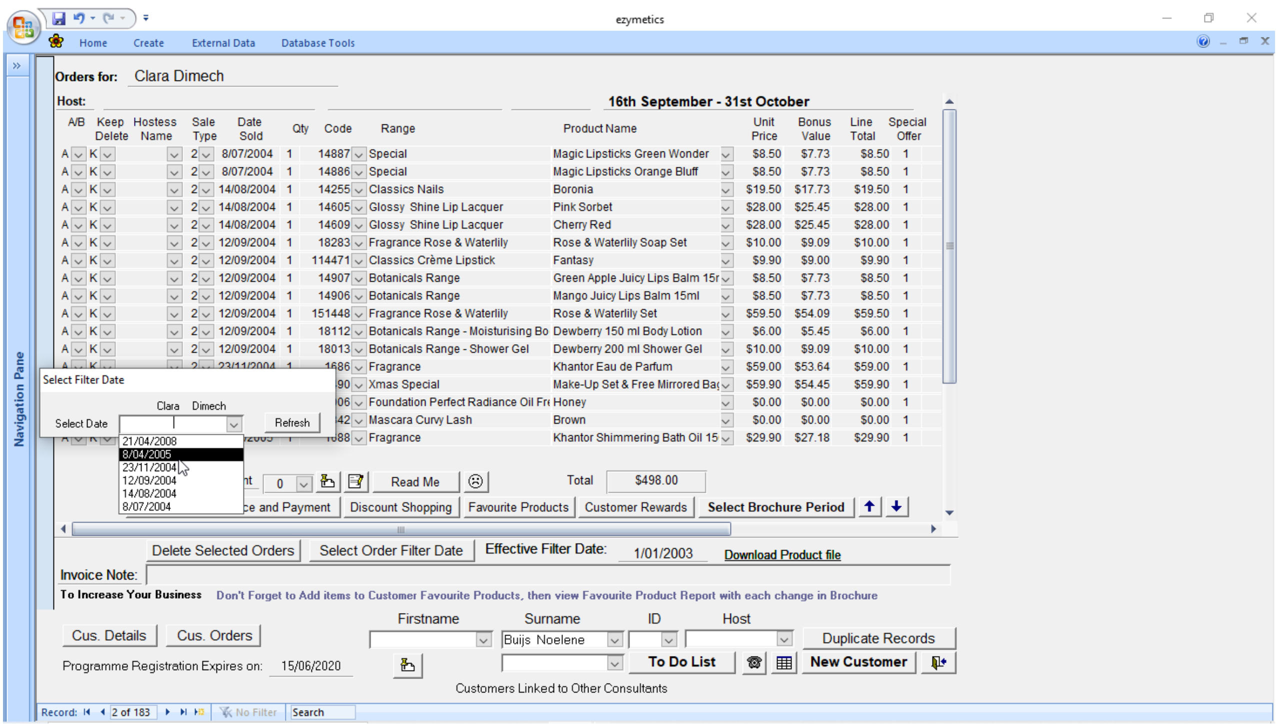
As this is very important I will repeat it again - It is essential that there is only one blank line at bottom of order form, and that all orders contain: Date, Qty, Code, Range, Product Name, Unit Price, Bonus Value, Special Offer and GST, if any section is left blank errors can occur in various reports. Please read the Read Me in the Order Details section. **It is not necessary to have a Host name.**

Order Filter

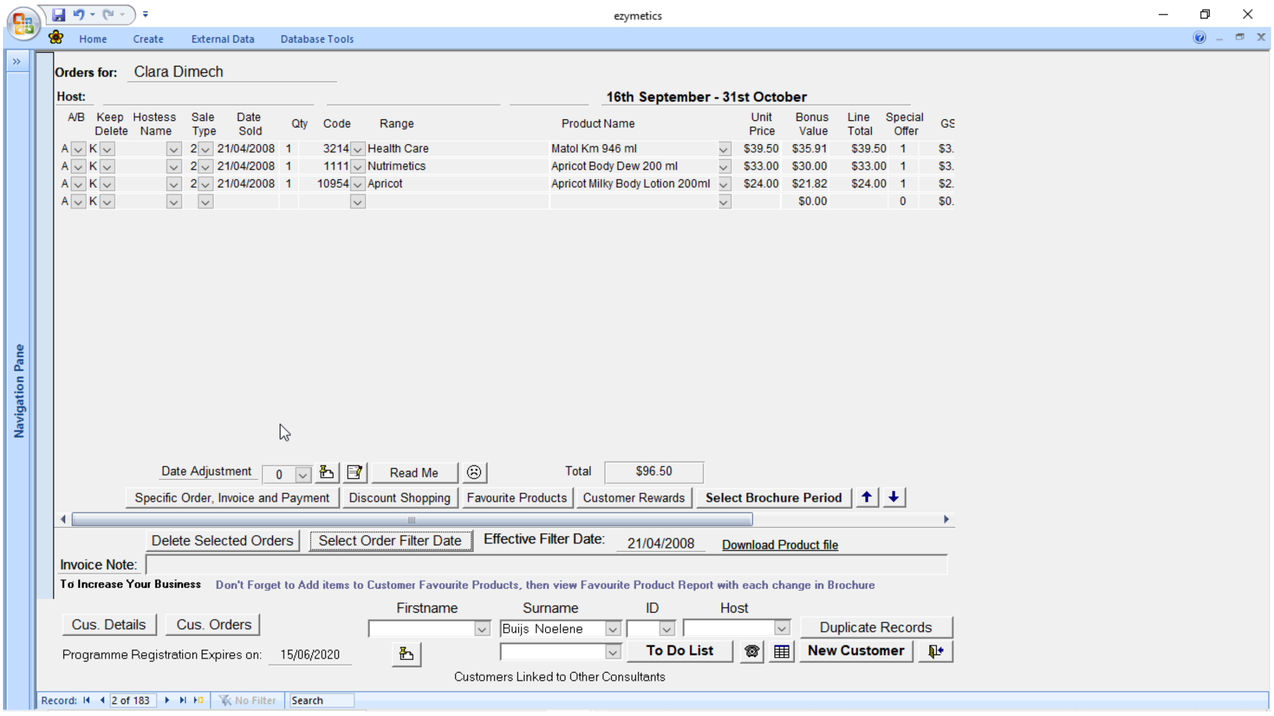
If a customer a customer has been ordering a lot of products regularly, their order details section may require scrolling down to put in new orders.



To overcome this use the Select Order Details Filter Date command
This will open the Date filter option



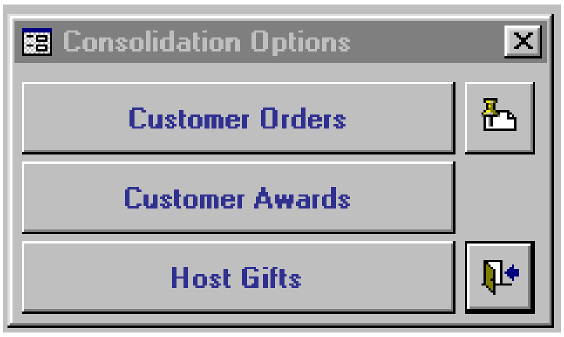
Simply select the first date that you want to show records from and click the refresh option and the previous records will not be displayed, the records are not deleted and can be re-displayed if required simply by reselecting the required earlier date


ezymetics
Home
Create
External Data
Database Tools
Navigation Pane
Orders for: Clara Dimech
Host:
16th September - 31st October
A/B
Keep Delete
Hostess Name
Sale Type
Date Sold
Qty
Code
Range
Product Name
Unit Price
Bonus Value
Line Total
Special Offer
GS
A K 2 21/04/2008 1 3214 Health Care Matol Km 946 ml $39.50 $35.91 $39.50 1 $3.
A K 2 21/04/2008 1 1111 Nutrimetics Apricot Body Dew 200 ml $33.00 $30.00 $33.00 1 $3.
A K 2 21/04/2008 1 10954 Apricot Apricot Milky Body Lotion 200ml $24.00 $21.82 $24.00 1 $2.
A K $0.00 0 $0.
Date Adjustment
0
Read Me
Total
$96.50
Specific Order, Invoice and Payment
Discount Shopping
Favourite Products
Customer Rewards
Select Brochure Period
Delete Selected Orders
Select Order Filter Date
Effective Filter Date:
21/04/2008
Download Product file
Invoice Note:
To Increase Your Business
Don't Forget to Add items to Customer Favourite Products, then view Favourite Product Report with each change in Brochure
Firstname
Surname
ID
Host
Cus. Details
Cus. Orders
Buijs Noelene
Duplicate Records
Programme Registration Expires on:
15/06/2020
To Do List
New Customer
Customers Linked to Other Consultants
Record: 2 of 183
No Filter
Search

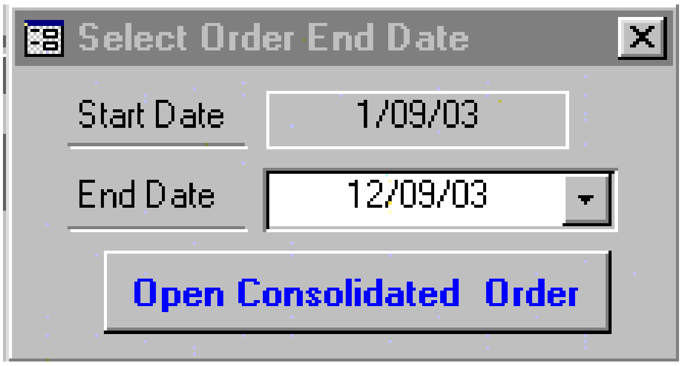
Consolidated Order

The consolidated order function filters all the orders that have been placed within the ezymetics progra; it then selects the orders placed between and including the dates you select.
It filters and collates all the selected products to display the number of each specific products required by customers during the selected period. This will allow you to print a report prior to placing your order to nutrimetics.

When you select Consolidate Orders from the Customer Menu, three options will be provided those being: Customer Orders, Customer Awards and Host Gifts; as the three options are not linked into one consolidated order but are separate reports, before placing your order to nutrimetics I would suggest that you print or view each of these options.



When you open the consolidate order Select Order First Date form, the dates of the previous consolidated order will be displayed. To avoid including items that have been ordered previously you must select a Start Date latter than the Previous End Date.



Either enter the date required or use the drop down arrow to select the consolidated order period.

In addition to the Consolidated Order Report you can print or view the Customer Order Report by Period; this may help you pack your orders for delivery rather than printing individual customer invoices, or a Hostess Invoice.

I have enclosed an example on the following page of the Consolidated Order Report,

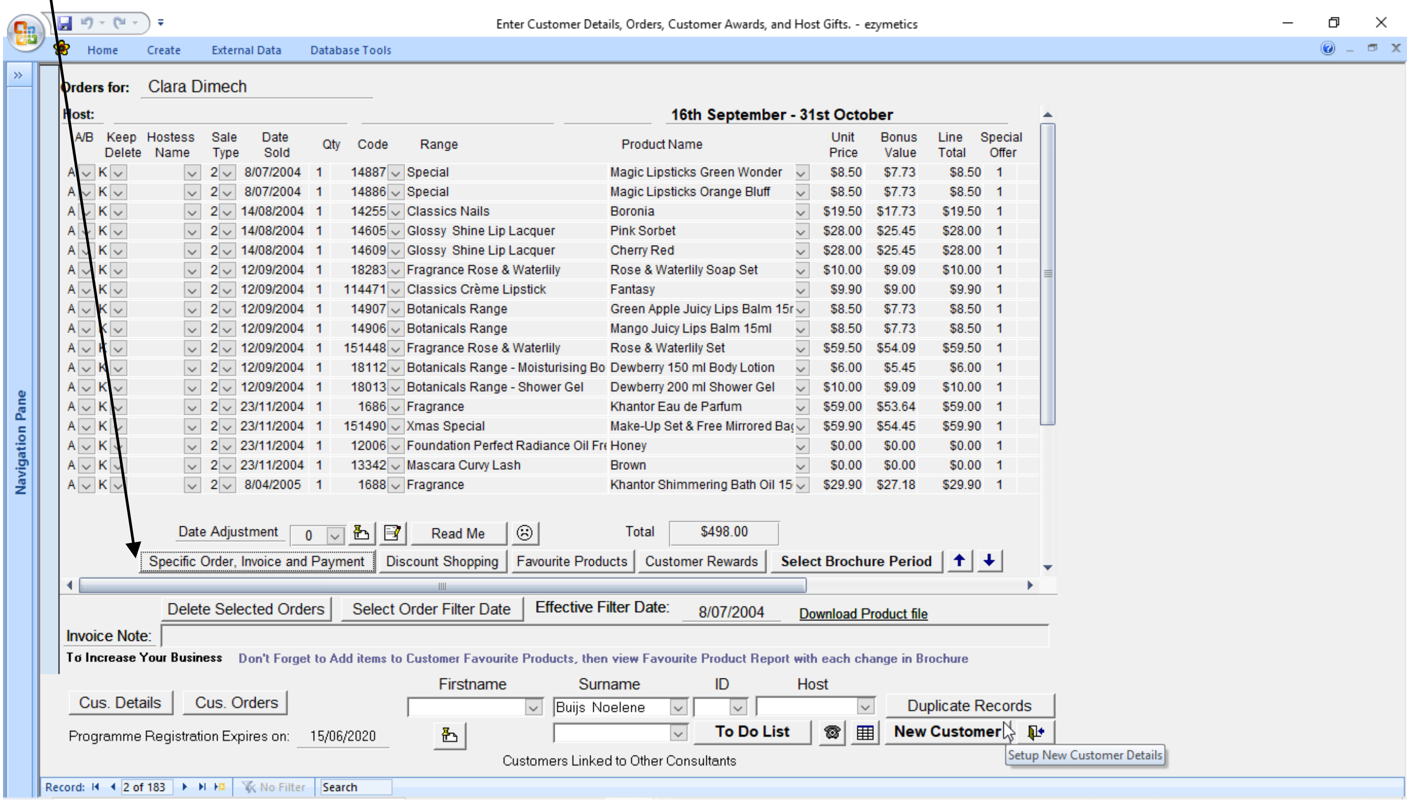
You will notice on the Consolidated Order Report, that there are two empty squares next to the quantity required, those boxes are provided to enable you to adjust the quantities required, as you may have product in your personal stock which can be used as part of the order.

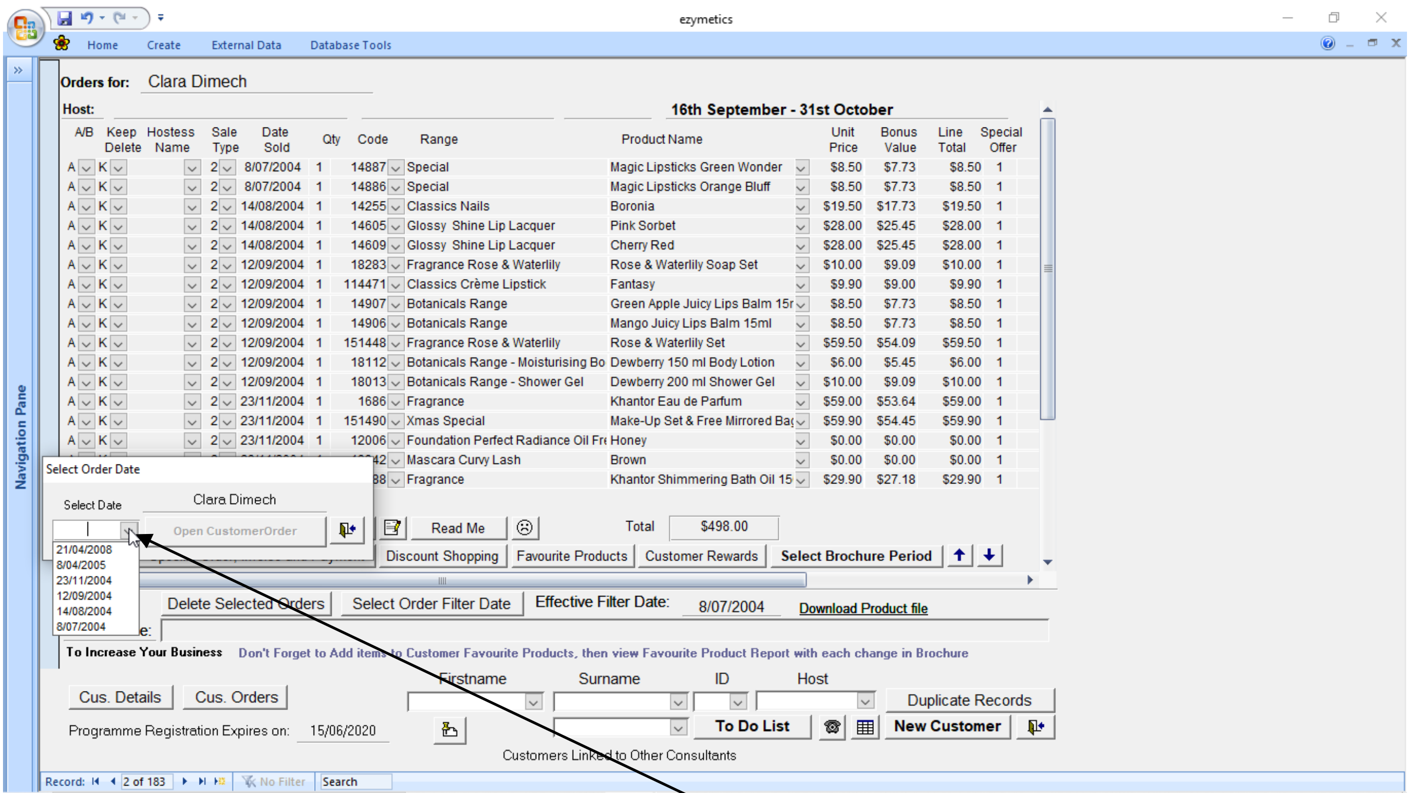
Consolidated Order Details for period 11/11/05 until 30/11/05

Code	Orderd By	Qty	Range	Product		Price
18/11/05	Joelle Meyepa	2	Body Care	Hand & Nail Treatment Crème 100 ml		$6.00
20/11/05	Justine Knott	1	Body Care	Hand & Nail Treatment Crème 100 ml		$6.00
24/11/05	Catherine Bressan	1	Body Care	Hand & Nail Treatment Crème 100 ml		$6.00
30/11/05	Sue Marchent	3	Body Care	Hand & Nail Treatment Crème 100 ml		$6.00
30/11/05	Gina Raich	2	Body Care	Hand & Nail Treatment Crème 100 ml		$6.00
1086	**Qty: 9** - =			Sub Total	$54.00	
24/11/05	Catherine Bressan	1	For Men	For Men After Shave Balm 100 ml		$17.00
11159	**Qty: 1** - =			Sub Total	$17.00	
18/11/05	Joelle Meyepa	6	Classics Moisturising Lipsticks	Mink - Navy Blue Case		$14.95
14742	**Qty: 6** - =			Sub Total	$89.70	
20/11/05	Colleen Farruiga	1	Botanicals Range - Lip Balm	Juicy Lips Balm Plum 15ml		$5.50
14905	**Qty: 1** - =			Sub Total	$5.50	
20/11/05	Colleen Farruiga	1	Botanicals Range - Lip Balm	Juicy Lips Balm Mango 15ml		$5.50
14906	**Qty: 1** - =			Sub Total	$5.50	
18/11/05	Joelle Meyepa	1	Skin Care	Nutri-Moist		$47.00
30/11/05	Gina Raich	1	Skin Care	Nutri-Moist		$47.00
30/11/05	Kina Zuin	1	Skin Care	Nutri-Moist		$47.00
150168	**Qty: 3** - =			Sub Total	$141.00	
18/11/05	Joelle Meyepa	1	Classics Moisturising Lipsticks	Color Caddy		$0.00
151351	**Qty: 1** - =			Sub Total	$0.00	
20/11/05	Colleen Farruiga	1	Special	Lip, Eye and Nail Colour Set + Free Bag		$36.90
151496	**Qty: 1** - =			Sub Total	$36.90	
29/11/05	Katrina Wurm	1	Nutri-Rich	Nutri-Rich Set plus Free Gold Gift Box		$69.90
151519	**Qty: 1** - =			Sub Total	$69.90	
29/11/05	Megan Sala	1	Special	Green Tea Skincare Set & Free Bag		$39.90
29/11/05	Sue Van Eyle	1	Special	Green Tea Skincare Set & Free Bag		$39.90
151537	**Qty: 2** - =			Sub Total	$79.80	
11/11/05	Amy Bickerdyke	1	Apricot Range	Apricot Set plus Free Backpack		$47.50
151700	**Qty: 1** - =			Sub Total	$47.50	

To print customer invoices.

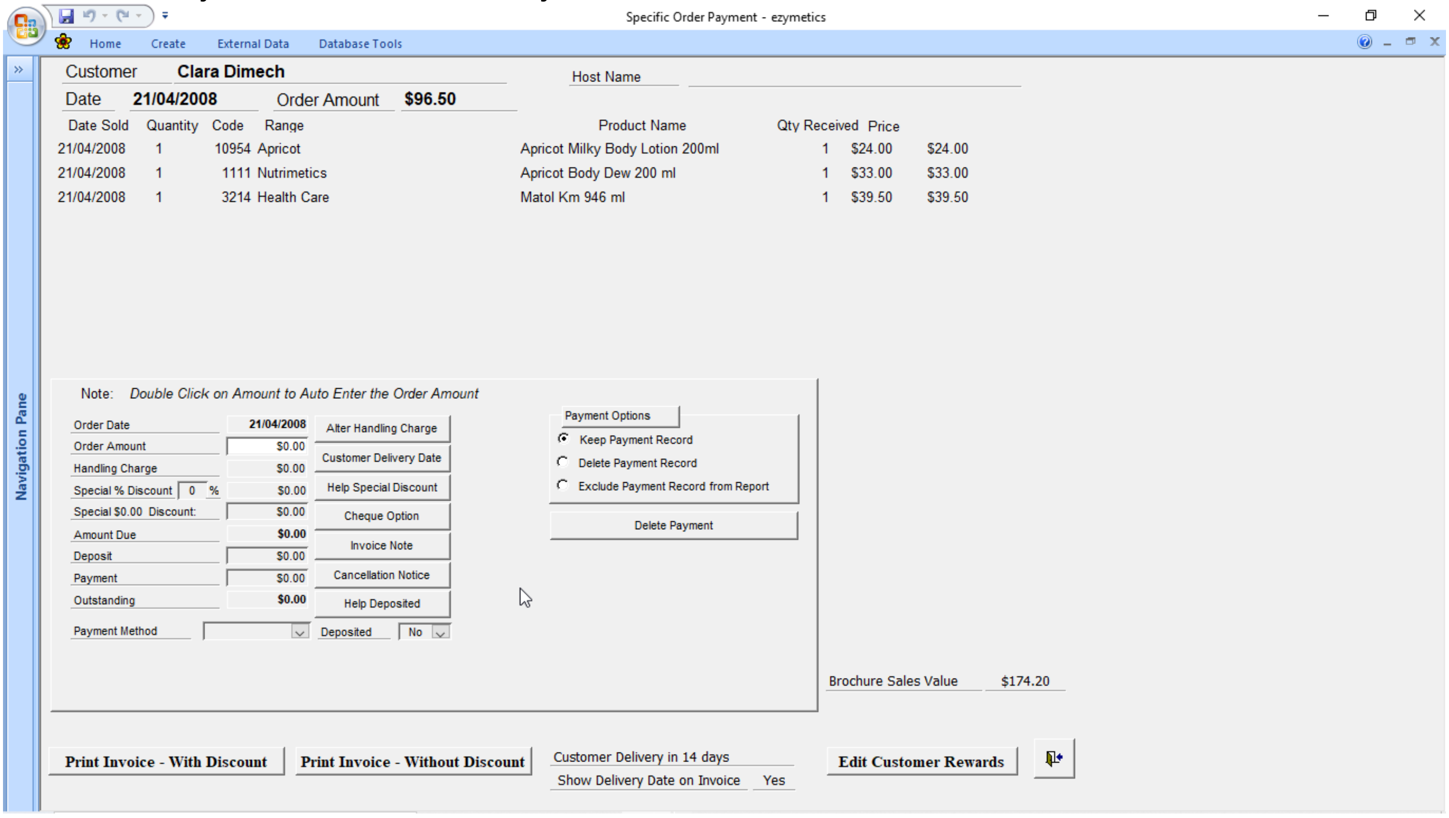
From the customer order section - select the Specific Order Invoice and Payment option.



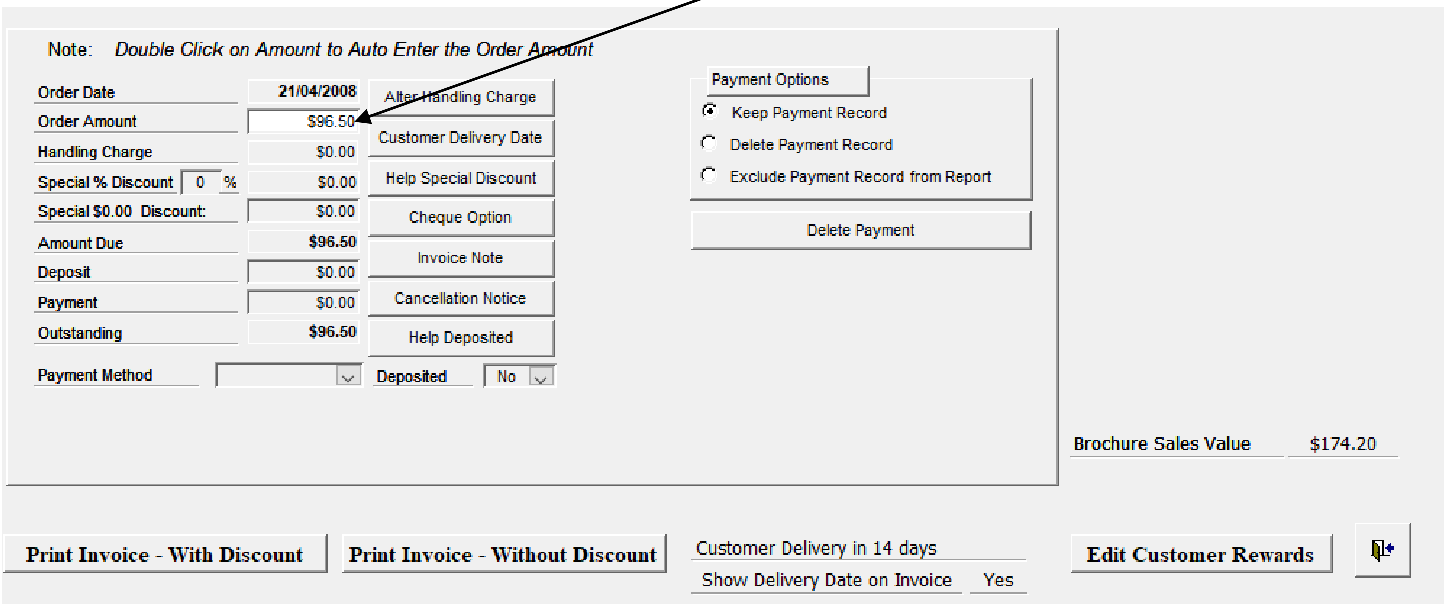


This will bring up a Select Order Date function, click on the drop down arrow to bring up the customer order dates, select the top date as this will be the most current order date.

This will display the products purchased by the customer on that date and the order amount, and then allow you to record the Order Payment.

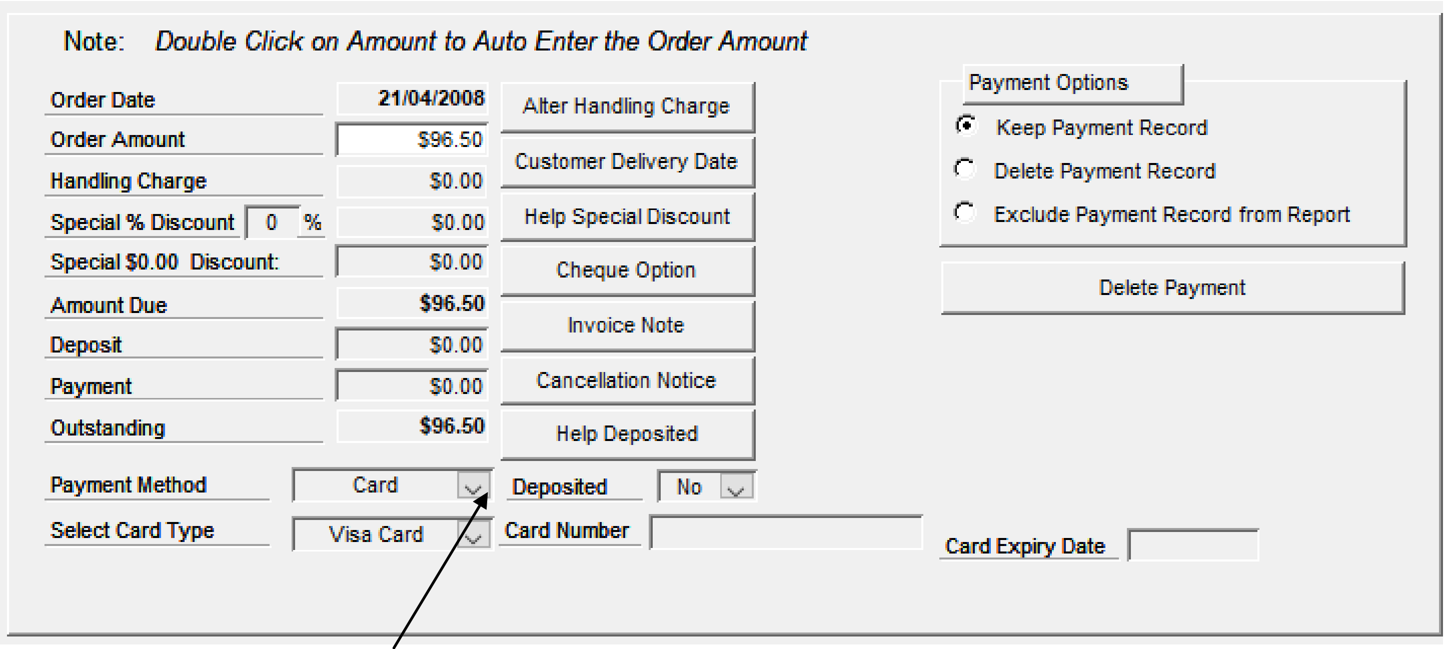


Double click on order amount and this insert the order total



If the customer has paid a deposit this can now be entered, also if you want to give the customer a discount – either a percentage discount or a dollar value discount this can now be included.

The handling charge can be included by clicking the Alter Handling Charge option, it is important that if no handling charge is included that the handling charge be set as 0 otherwise the program will not be able to calculate the total



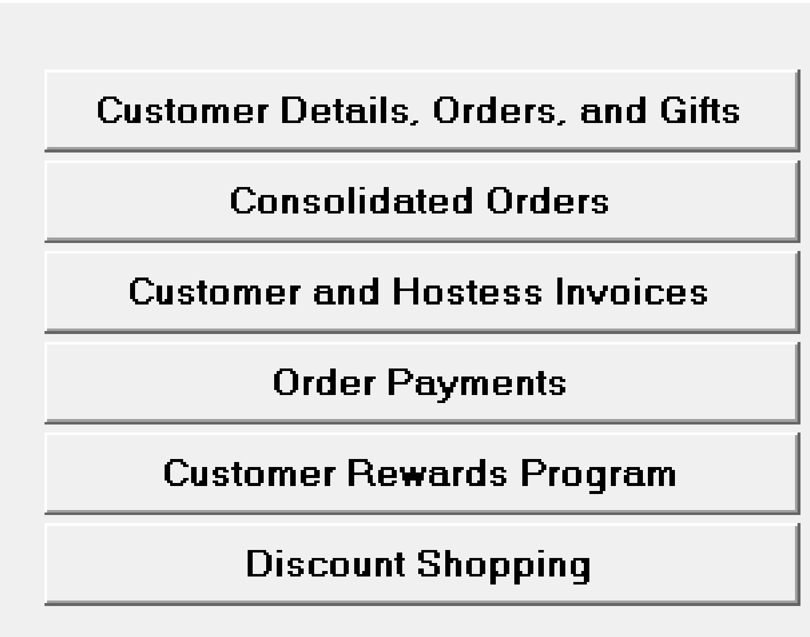
If a customer pays by credit card simply select Payment Method Card and the option to record the card details will be available.

You now have two options to print an invoice either showing the discount given or no discount invoice.

If the customer is eligibly for Customer Rewards the Brochure Sales Value would indicate the amount applicable and also additional buttons would be displayed allowing to you to Reward the customer if applicable.

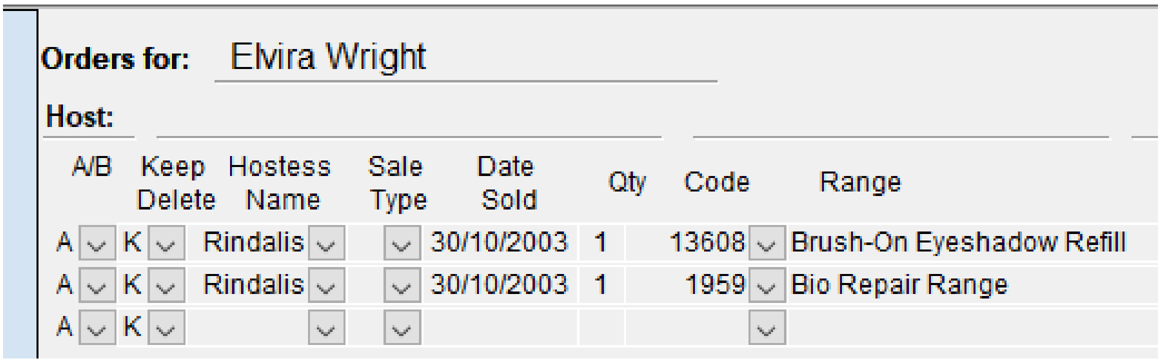
The individual customer delivery date can be changed by altering the Delivery in Days section at the bottom of the form.

To view order payments and or finalize the entering balance of payment:
Select the Order Payments option on the Customer tab page



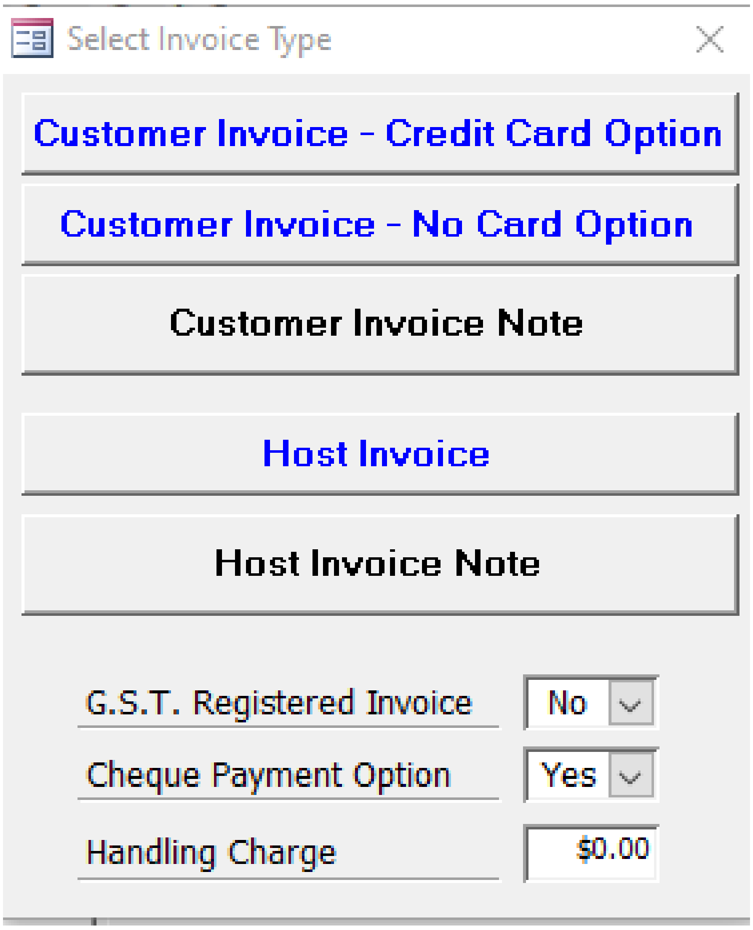
Host Invoices
Are also viewed and or printed from the Customer tab page

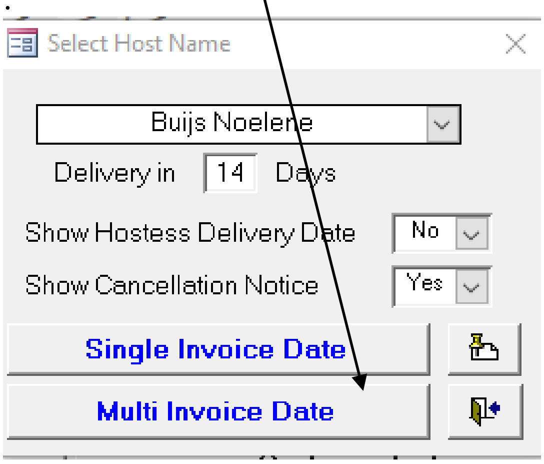
When orders are entered into the program, if the order was placed at a demonstration held by a host it is important to select the host name



This will link the customer with the host on that day and enable Host Invoices to be printed or viewed.

Host invoices can be either Single Invoice or date or Multi Invoice date if required – to display records pre or prior demonstration orders





The invoice will display all orders and amounts due by all customers in relation to the specific demonstration. The sample below is part of a Host invoice.
The note below the Satisfaction Guarantee is add by the Host Invoice Note function prior to selecting and printing the invoice.

Name	Product		Qty	Price	Total	G.S.T.
Chris Kerr	Home Ph	Mobile	Cheque ☐	Card ☐	Cash ☐	
RRP $61.30	GST $0.00	Handling $0.00	TOTAL $61.30	DEPOSIT $	BALANCE $	
18441 Special	Jasmin & Ylang Ylang Hand Crème		6	$6.00	$36.00	
14250 Classics Nails	Frosted Grape		1	$7.80	$7.80	
1848 Aromatherapy	Body Massage Oil (50ml)		1	$17.50	$17.50	
Helen Drayton	Home Ph	Mobile	Cheque ☐	Card ☐	Cash ☐	
RRP $50.40	GST $0.00	Handling $0.00	TOTAL $50.40	DEPOSIT $	BALANCE $	
1835 Body Care	Nutri-Soft Hand Cleanser 350 ml		1	$8.50	$8.50	
18441 Special	Jasmin & Ylang Ylang Hand Crème		1	$6.00	$6.00	
1759 Hair Care	Frizz Control Serum 25ml		1	$15.90	$15.90	
18011 Botanicals Range - Cleanser Toner	Grapefruit Crush 175 ml		2	$10.00	$20.00	
Margaret Williams	Home Ph 93377196	Mobile	Cheque ☐	Card ☐	Cash ☐	
RRP $15.60	GST $0.00	Handling $0.00	TOTAL $15.60	DEPOSIT $	BALANCE $	
14259 Classics Nails	Brocade		1	$7.80	$7.80	
14257 Classics Nails	Rose Dew		1	$7.80	$7.80	

SATISFACTION GUARANTEE

If for any reason you are are unhappy with this transaction, nutrimetics international will promptly refund the purchase price or exchange any product found unsatisfactory upon return of this product with proof of purchase within sixty days of purchase date.

CANCELLATION NOTICE

You May cancel this transaction at any time during the next ten days Simply Call, Fax, or Write to the Authorised Distributor shown above

What a great demonstration, it really was fun with all your good friends, we will have to do it again one day. Or perhaps one of your friends may like to have their own show.

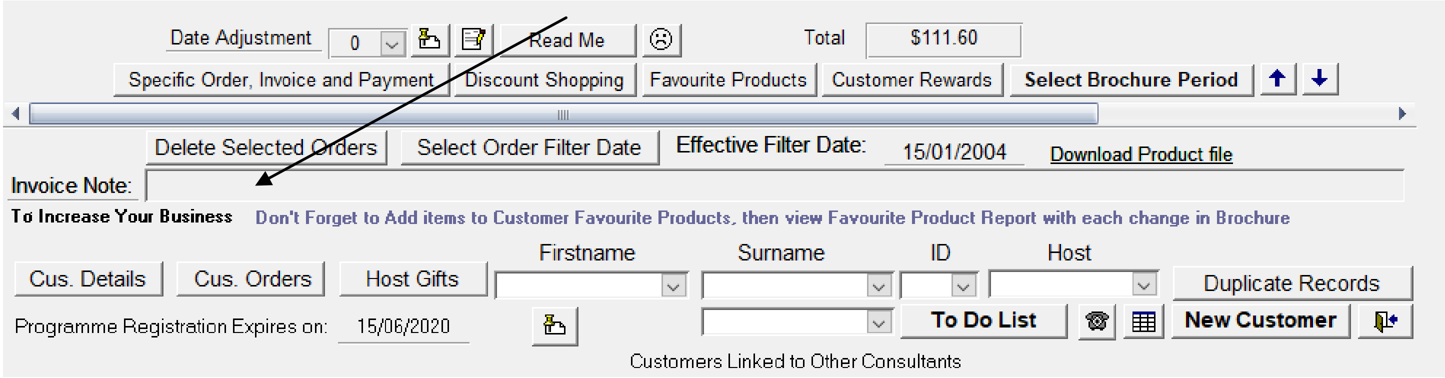
Please return the lower section of this invoice with your payment

Noelene Buijs
34 Tentaldra Drive
Keilor

Order Date	**11-Aug-05**
Order Amount:	$364.95
Handling Charge:	$0.00
Order Total:	**$364.95**

Invoice Note

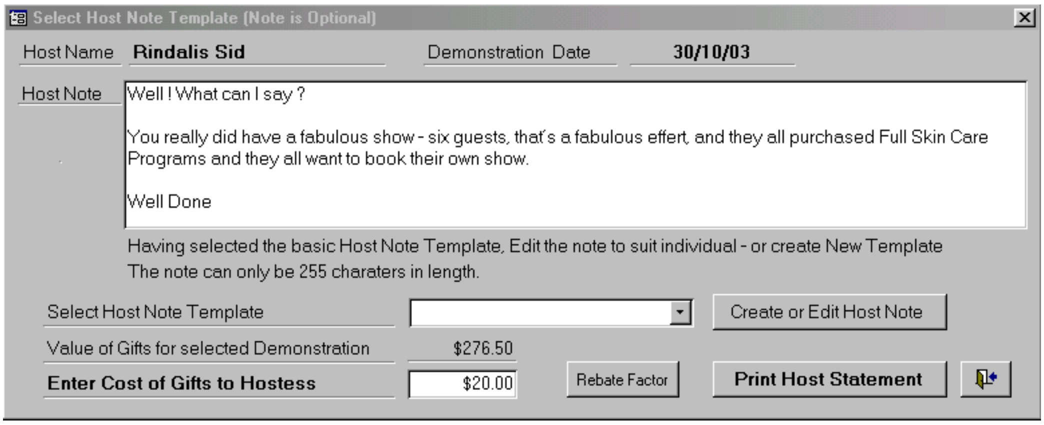
If when you are entering the customer order you record a brief note in the invoice note field this short note will be printed on the top of the invoice. Do not forget to remove the note if not applicable to that customer the next time he or she places an order.



Specific Host Gift Statement

A host is usually rewarded after the demonstration is held with full price items selected from the product rebate selector, to point's value depending on value of the demonstration.
The Host normally pays a reduced amount for these items.
The Host Gift Statement is included with the Host invoice and shows the value of the items selected and you can record the cost of those items to the host.
A short thank you or similar note can also be included on the statement if required.

From the Customer Menu select the Specific Host Gift Statement button, which will enable you to select the Host name and Demonstration Date, and Host note if required



You can either select an existing Host Note Template, which you can then edit to suit your needs at that time. Or you can create a new template or edit an existing host note template.
Due to the filter function which is applied to this function - notes can only be 255 characters in length

After you have selected the note you want to include with the Host Gift Statement simply click on the Print Host Statement button.

Demonstration Date 30/10/03

Host Gifts for Sid Rindalis

Address 135 Burrawyne Crescent
Keilor
VIC 3036

Home Ph 03 9 390 7461
Mobile 040 811 0422

Qty	Code	Range	Product Name	Price	Cost
1	14332	Classics Crème Lipstick	Frosted Grape	$26.50	$26.50
1	18041	Botanicals Range	Cucumber Eye Gel 25 ml	$31.00	$31.00
1	18153	Botanicals Green Tea Range	Face Hydrator 60 ml	$15.50	$15.50
1	1882	Ine-kari Range	Emollient 60 ml	$47.00	$47.00
1	1942	Restore Range	Revitalising Day Crème 60 ml	$49.50	$49.50
1	1943	Restore Range	Renewing Night Crème 60 ml	$57.50	$57.50
1	1944	Restore Range	Firming Eye Lift 15 ml	$49.50	$49.50

Value of Gifts $276.50
Special Price to you Sid $20.00

You really did have a fabulous show - twenty guests, that's a fabulous effert, and they all purchased Full Skin Care Programs and they all want to book their own show.

Well Done

Customer Order Form

To assist both you in the collection of customer orders and your customers to place orders use the order form which can be disturbed at demonstrations or included with you brochure mail.

The section on the bottom of the form displaying whom to make cheque payable to is established when you enter your personal details when you initially setup the program with password.

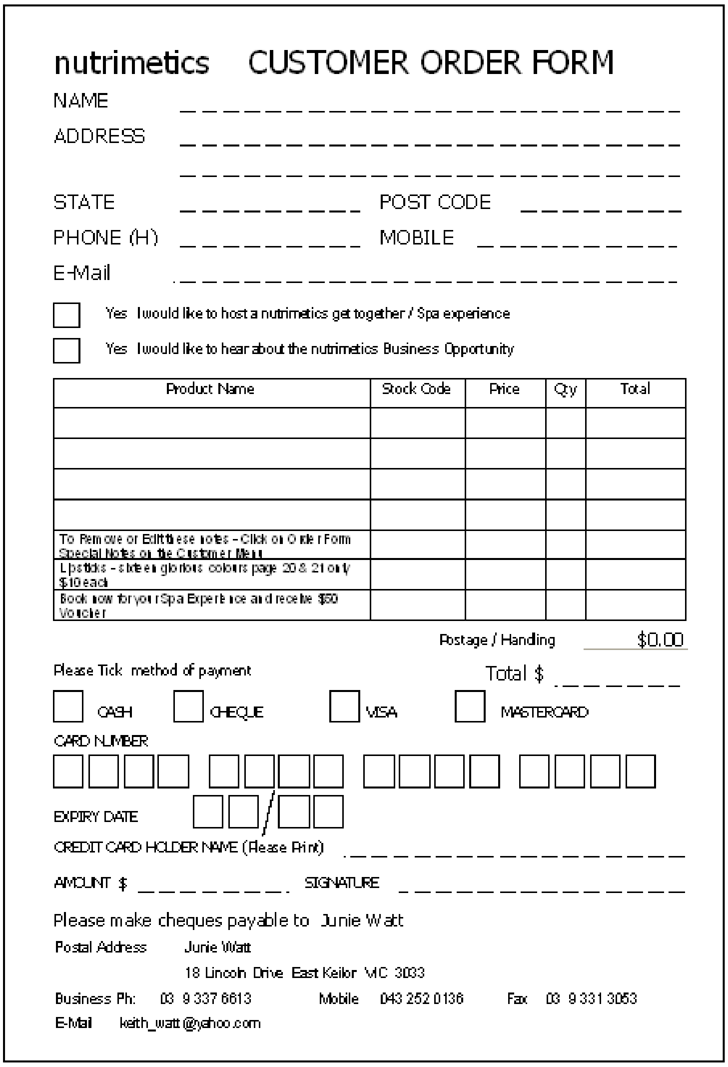
The Handling Charge amount can be adjusted from either the

Consultants Menu / Personal Details / Invoice Handling Charge
or the Customer Menu / Customer and Hostess Invoice
If you do not charge a handling fee you must enter the Zero numeric symbol

The Order form can be printed in two ways:

1. Two per A4 sheet, which can be cut and distributed at a demonstration - from the Customer Menu select Customer Order Form.
2. As part of your Mail out you can print an A4 Sheet with the order form included at the bottom half of the sheet.

You may need to adjust the printable page size to suit your printer.



nutrimetics CUSTOMER ORDER FORM

NAME ________________________

ADDRESS ________________________

____

STATE __________ POST CODE _________

PHONE (H) __________ MOBILE __________

E-Mail ________________________

☐ Yes I would like to host a nutrimetics get together / Spa experience

☐ Yes I would like to hear about the nutrimetics Business Opportunity

Product Name	Stock Code	Price	Qty	Total
To Remove or Edit these notes - Click on Order Form Special Notes on the Customer Menu				
Lipsticks - sixteen glorious colours page 20 & 21 only $10 each				
Book now for your Spa Experience and receive $50 Voucher				

Postage / Handling $0.00

Please Tick method of payment

Total $ ______

☐ CASH ☐ CHEQUE ☐ VISA ☐ MASTERCARD

CARD NUMBER

EXPIRY DATE /

CREDIT CARD HOLDER NAME (Please Print) ________________

AMOUNT $ ________ SIGNATURE ______________

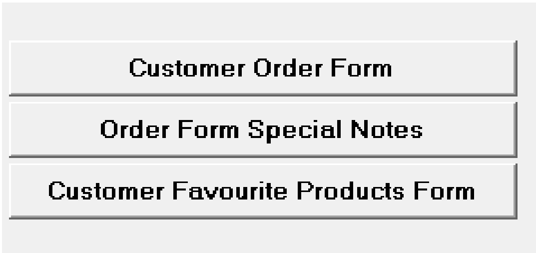
Please make cheques payable to Junie Watt

Postal Address Junie Watt

18 Lincoln Drive East Keilor VIC 3033

Business Ph: 03 9 337 6613 Mobile 043 252 0136 Fax 03 9 331 3053

E-Mail keith_watt@yahoo.com

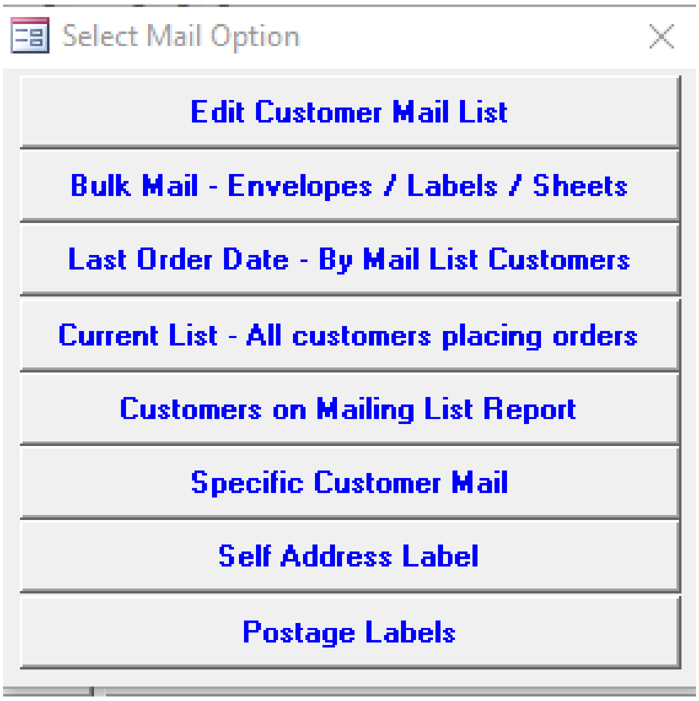


To open and print the Customer Order Form Click: Customer Order Form

To edit or remove the notes included in the Customer Order form.
Click on Order Form Special Notes

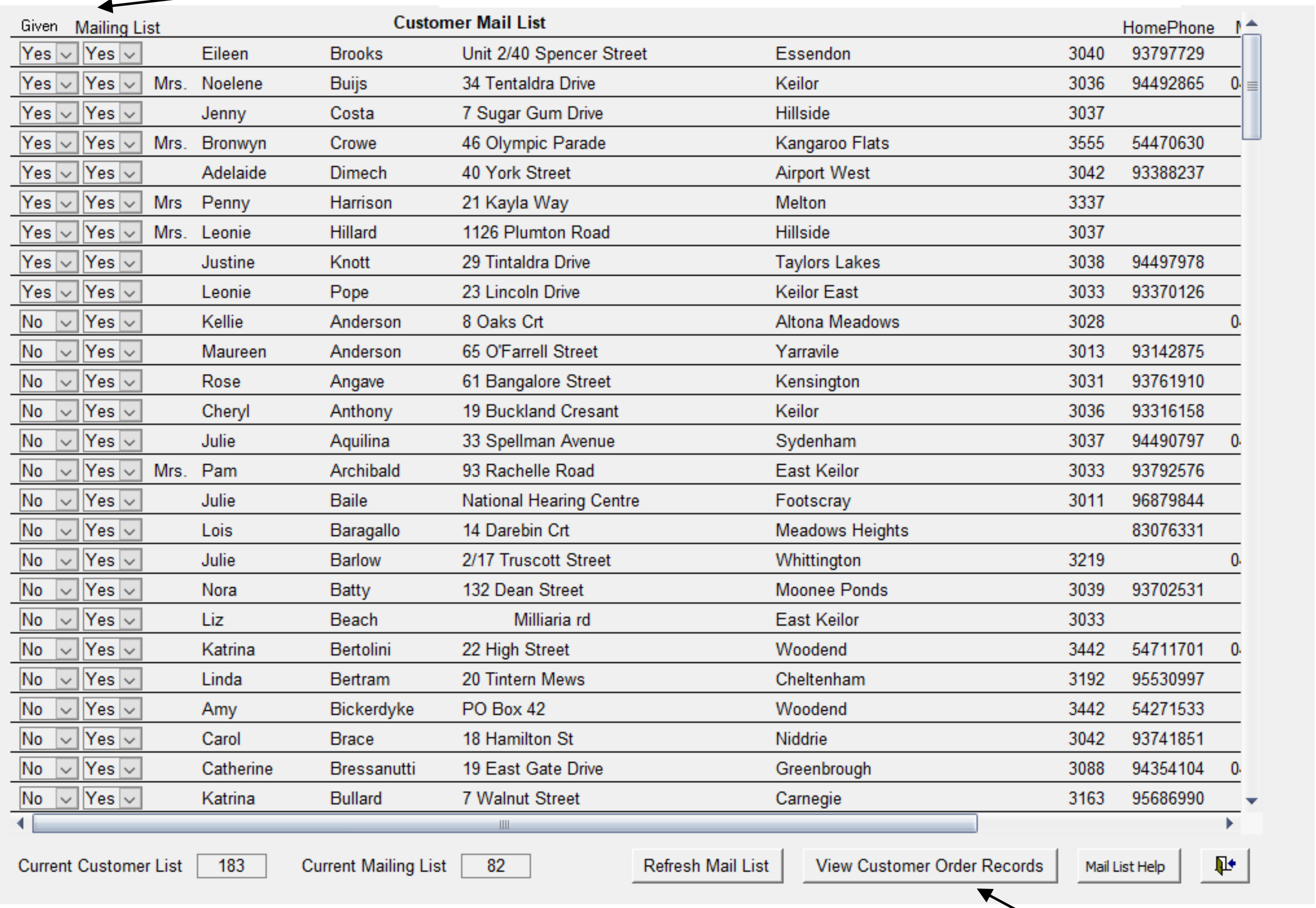
Customer Mail

To bulk edit your customer mailing list, click on Edit Customer Mail List. This will bring up a form showing your current mailing list, the number of customers currently on your records, and the current number to whom you have elected to mail to.
Although you may have transferred a customer to another consultant in your team, that customer name will still appear on your mailing list and will be added to your Mail-out Total, which is displayed at the bottom of the form. To remove them from that total you must change the option to not include them as part of your mail list. But even if you have not changed the option to include him or her as part of your mail list, no envelope or label will be printed, only customers that are linked to your consultant number and you have selected to be included on your mailing list will be available in any of the mailing types.
Customers are sorted by Last name but more importantly they are firstly sorted by the consultant number they are linked to, this will enable you to quickly remove customers from your mail list total if required by selecting the column [Mailing List] and select (No)



The list below provides an example of a mailing list showing the first two columns as Given and Mailing List.

If you have given the brochure personally select Yes
If you wish to take them off your mailing list select No

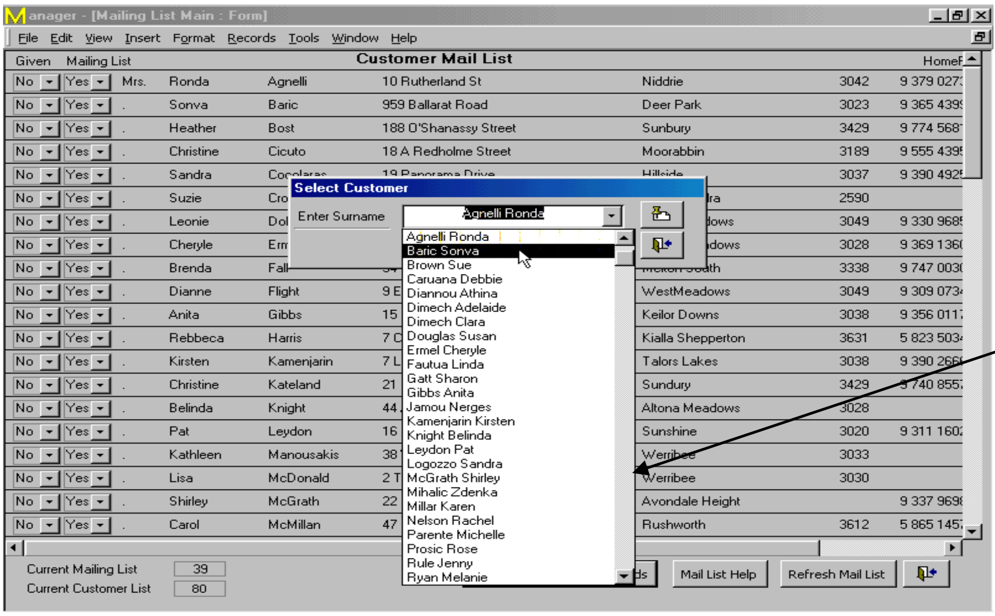


Customer Mail List

Given	Mailing List							HomePhone	
Yes	Yes		Eileen	Brooks	Unit 2/40 Spencer Street	Essendon	3040	93797729	
Yes	Yes	Mrs.	Noelene	Buijs	34 Tentaldra Drive	Keilor	3036	94492865	0.
Yes	Yes		Jenny	Costa	7 Sugar Gum Drive	Hillside	3037		
Yes	Yes	Mrs.	Bronwyn	Crowe	46 Olympic Parade	Kangaroo Flats	3555	54470630	
Yes	Yes		Adelaide	Dimech	40 York Street	Airport West	3042	93388237	
Yes	Yes	Mrs	Penny	Harrison	21 Kayla Way	Melton	3337		
Yes	Yes	Mrs.	Leonie	Hillard	1126 Plumton Road	Hillside	3037		
Yes	Yes		Justine	Knott	29 Tintaldra Drive	Taylors Lakes	3038	94497978	
Yes	Yes		Leonie	Pope	23 Lincoln Drive	Keilor East	3033	93370126	
No	Yes		Kellie	Anderson	8 Oaks Crt	Altona Meadows	3028		0.
No	Yes		Maureen	Anderson	65 O'Farrell Street	Yarravile	3013	93142875	
No	Yes		Rose	Angave	61 Bangalore Street	Kensington	3031	93761910	
No	Yes		Cheryl	Anthony	19 Buckland Cresant	Keilor	3036	93316158	
No	Yes		Julie	Aquilina	33 Spellman Avenue	Sydenham	3037	94490797	0.
No	Yes	Mrs.	Pam	Archibald	93 Rachelle Road	East Keilor	3033	93792576	
No	Yes		Julie	Baile	National Hearing Centre	Footscray	3011	96879844	
No	Yes		Lois	Baragallo	14 Darebin Crt	Meadows Heights		83076331	
No	Yes		Julie	Barlow	2/17 Truscott Street	Whittington	3219		0.
No	Yes		Nora	Batty	132 Dean Street	Moonee Ponds	3039	93702531	
No	Yes		Liz	Beach	Milliaria rd	East Keilor	3033		
No	Yes		Katrina	Bertolini	22 High Street	Woodend	3442	54711701	0.
No	Yes		Linda	Bertram	20 Tintern Mews	Cheltenham	3192	95530997	
No	Yes		Amy	Bickerdyke	PO Box 42	Woodend	3442	54271533	
No	Yes		Carol	Brace	18 Hamilton St	Niddrie	3042	93741851	
No	Yes		Catherine	Bressanutti	19 East Gate Drive	Greenbrough	3088	94354104	0.
No	Yes		Katrina	Bullard	7 Walnut Street	Carnegie	3163	95686990	

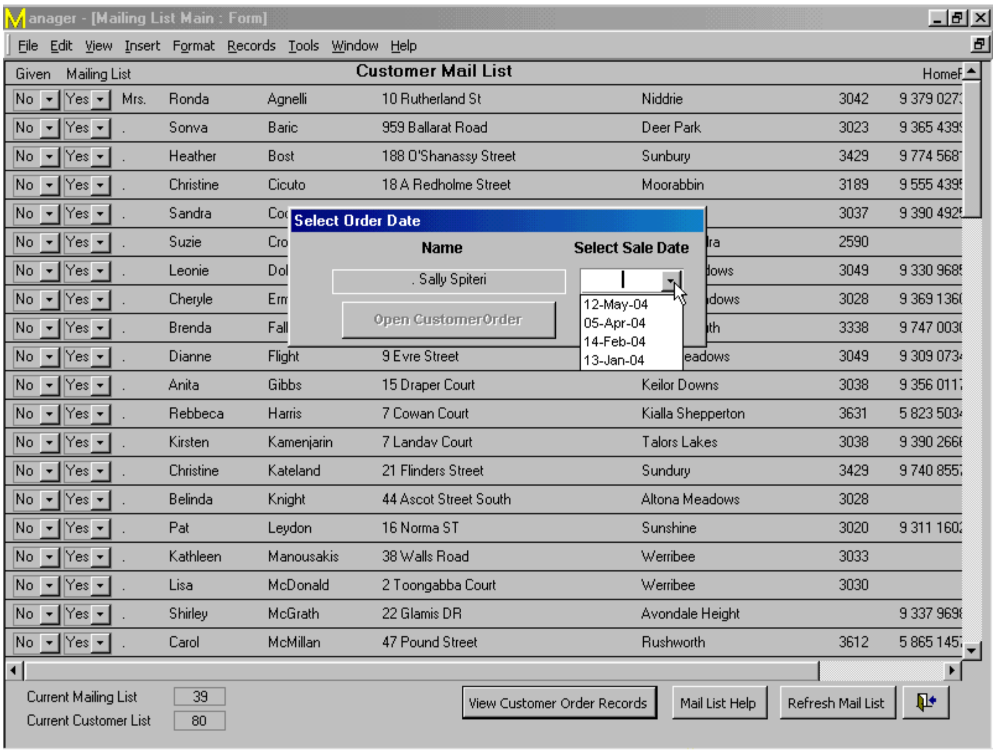
Current Customer List 183 Current Mailing List 82 Refresh Mail List View Customer Order Records Mail List Help

If in doubt as to whether to include a particular customer in your current mail list
Click on the View Customer Records button



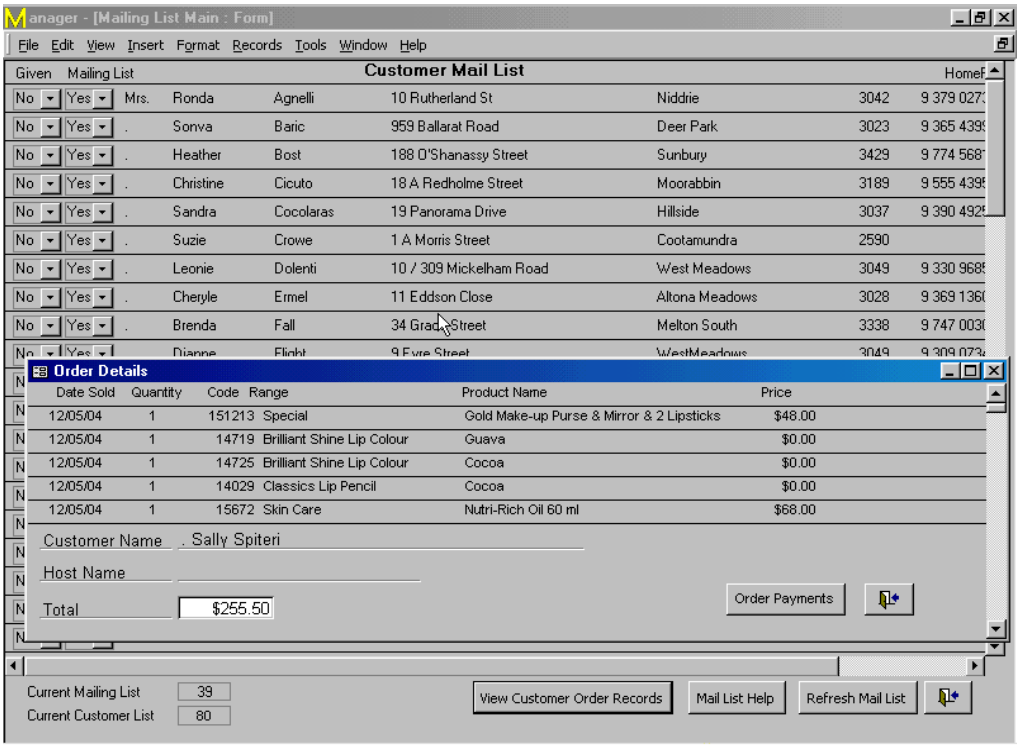
From the drop down list select the desired customer.

After you select the required customer the dates that orders have been placed by that customer will be displayed in the drop down list.



If you select the order date the products purchased on that date will be displayed, this may assist you in your decision whether to include the customer on your current mail out.

Another option in selecting if a customer is to continue on your mail list, is from the Reports Menu select Sales Report and then select Customer Purchase Dates Report, This will enable you to print or view a report of dates all customers have made purchases and the number of items purchased on those dates.



After you click on the Refresh Mail List or close and return to this form the list will be sorted to enable you to easily restore or edit the mailing list for future mailing.
When you refresh the list the customer name will be moved to the lower section of the form, and can be easily restored in future mail outs if required.

Two other sections to assist you with your mail out

1. Click on Customer on Mail List Report.

   This will display a list of all customers on your mail list, use this report after you have sent your mail to record: Have you rung the customer, did they place an order.

Customers on Mailing List

Have you made a follow-up phone call and has the customer placed an order

Name	Address	Home Ph:	Mobile	Work Ph:	Reply
Maureen Anderson	65 O'Farrell Street Yarraville . VIC 3013	9 314 2875			
Rose Angave	61 Bangalore Street Kensington . VIC 3031	9 376 1910			
Katrina Bertolini	22 High Street Woodend . VIC 3442	5 471 1701			
Carol Brace	18 Hamilton St Niddrie . VIC 3042	9 374 1851			
Catherine Bressanutti	19 East Gate Drive Greenbrough . VIC 3088	9 435 4104	040 213 0782		
Clara Dimech	40 York Street Airport West . VIC 3042	9 338 8237			
Cheryle Ermel	11 Eddson Close Altona Meadows Melb. VIC 3028	9 369 1360		9 869 1360	
Colleen Farruiga	101 Sickaworra Road Romsey . VIC 3434	5 429 6323	040 224 2089	5 427 1640	
Tania Garofalo	25 Petrik Drive Keilor . VIC 3036	9 390 9678			
Anita Gibbs	15 Draper Court Keilor Downs Melb. VIC 3038	9 356 0117	041 859 9897		

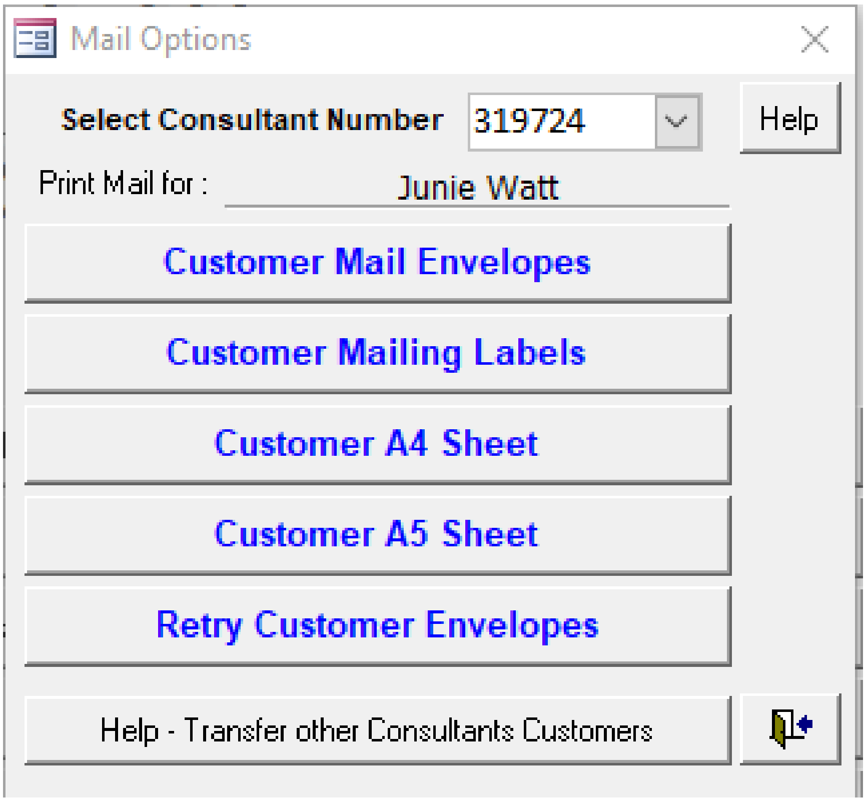
2. Click on Sales Reports – Mailing List Last Order Date.
   This will not only provide you with a list of customers currently on your mailing list but will display the date of their last order. From there you can decide if you wish to keep them on your mailing list , remove them from your mailing list or delete them from your customer list completely.

Mailing List Customers - Last Order Date

Note: This list is sorted by Customer ID as there may be more than one customer with the same surname. The list cannot be sorted by last order date as the last order date is a calculation or maximum of all the individual customers order dates. *K R D - Keep on Mail List, Remove from Mail List, Delete from Program*

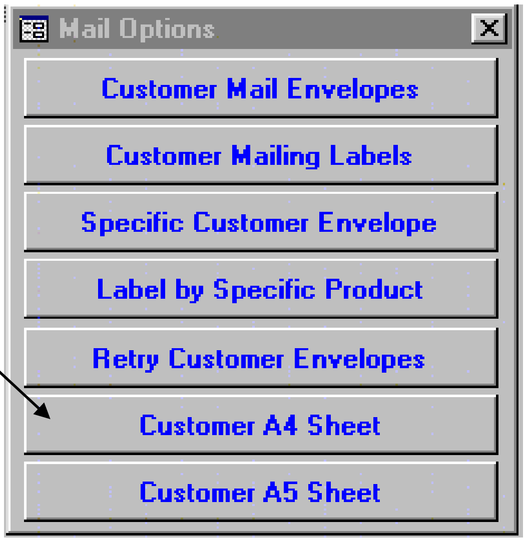
Customer ID	Name	HomePhone	MobilePhone	Last Order Date	K	R	D
5	Cheryle Ermel	9 369 1360		12/01/2005			
22	Jane Sneddon	9 336 1874		12/08/2005			
43	Anita Gibbs	9 356 0117	041 859 9897	17/01/2006			
62	Jenny Rule	9 568 4274		29/04/2006			
77	Shirley McGrath	9 337 9698		10/10/2007			
78	Clara Dimech	9 338 8237		8/04/2005			
92	Carol Brace	9 374 1851		19/07/2006			
97	Julia Swyrydan	9 370 7568		16/09/2005			
110	Tania Garofalo	9 390 9678		6/08/2005			
131	Sharon Skinner	5 429 6376		1/06/2007			
134	Belinda Harmes	8 361 6161		28/10/2005			
139	Jennifer Owen	8 390 0818		19/08/2005			
140	Kristy Wickham	9 734 6904	041 704 7089	23/11/2006			
166	Gina Raich	5 021 2469	041 425 3610	30/11/2005			
171	Rose Angave	9 376 1910		23/10/2005			
214	Tina Pirozzi	9 331 1737		3/04/2007			
219	Janelle Wright	9 749 0860	041 810 6251	21/02/2006			
220	Joelle Meyepa	9 449 2525		18/11/2005			
221	Colleen Farruiga	5 429 6323	040 224 2089	3/04/2007			
222	Catherine Bressanutti	9 435 4104	040 213 0782	26/11/2006			

When you decide to do your mail out, select – Bulk Mail – Envelopes / Labels / Sheets
This will bring up the types of mail out options.
But you need to select your consultant number or if you are doing the mail out for a member of your team – select their consultant number.



Mailing preferences
The program provides a wide variety of mailing methods; whether your preferences are labels, envelopes, A4, or A5 sheets.

The A4 sheet option allows you print the mailing address at top and a customer order form in the lower half of the sheet, in either Regular mail, Print post approved, or Post Paid.



Page Setup

Because there are so many printer brands available it has impossible for me to ensure that the Ezymetics program establishes the correct printer page setup for envelops and labels.

When you install the program it will establish your printer type, which may be set to a default paper size of A4 sheet, consequently your printer may set the envelopes and labels to print on A4 size paper.
As such you may be required to manually go through the program to setup the correct size for envelopes to make them either DL or No 10 envelope size, and alter the left margin to as close to 12mm as your printer will allow.

Once these changes are made they will be set and will not need to be altered again.

The Envelopes and labels are found on two menus, Customers, and Personal / Group Details

Within the Customer Menu you may be required to change envelope and label sizes for:
Customer Mail - Customer Birthday - Group Fund Raising and Mail to Nutrimetics

Customer Mail

Bulk Mail Options

Customer Mail Envelopes – Plain envelope – Postage Paid envelope
Change to DL or No 10 envelope size

Customer Mailing Labels 105 X 37 change page setup to size – legal
Leave 70 X 25 and 98 X25.4 as paper size A4

Specific Customer Mail

Plain Envelope and Postage Paid - Change to DL or No 10 envelope size

Customer Birthday

Plain Envelope - Change to DL or No 10 envelope size
with Left Margin approximately 12mm depending on printer

Group Fund Raising

Mail Options.

Plain envelope – Postage Paid envelop - Change to DL or No 10 envelope size

Mailing Labels
Customer Mailing Labels 105 X 37 change page setup to size – legal
Leave 70 X 25 and 98 X25.4 as paper size A4

Consultant Mail by Level

Plain envelope – Postage Paid envelope - Change to DL or No 10 envelope size
with Left Margin approximately 12mm depending on printer.

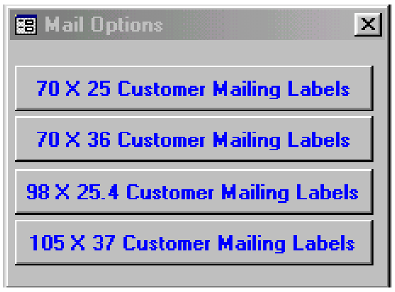
Consultant Mailing Labels 105 X 37 change page setup to size – legal
Leave 70 X 25 and 98 X25 as paper size A4

Consultant Birthday Envelopes

Plain envelope - Change to DL or No 10 envelope size
with Left Margin approximately 12mm depending on printer.

If when you are using the program other reports do not print as expected check to see
that the page setup for the report is A4 sheet.

Alter Label and Report Design.

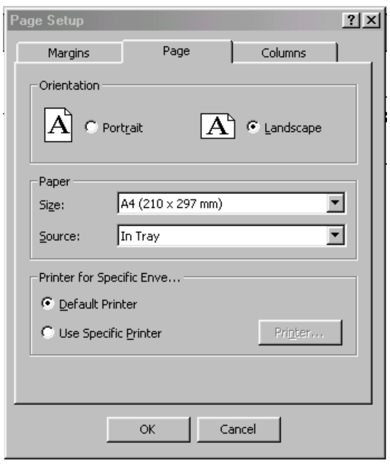


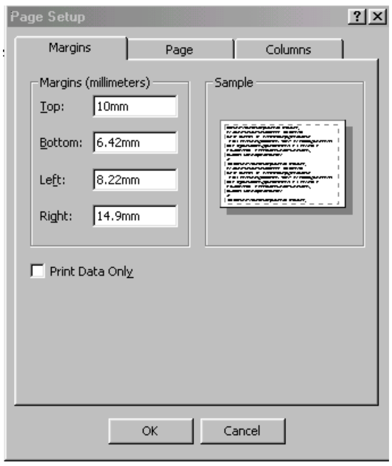
Within the ezymetics program there are four Customer Mailing Label formats, but if for example the label size you purchase is not exactly the size label that I set, you can alter the size and layout of the label.
This may take some experimental printing to establish that the changes you have made are correct to your needs. Select the size nearest to what you have purchased, open the label print preview which will display the labels, then click on the icon that looks like a triangle and a pencil this will take you into the design view where you can change the size of the label by dragging the edge of the design view of the label, you can also change the position of the label text.

Also in other reports and envelopes where you see the design icon being the triangle, rule and pencil, you can alter the layout and or wording in the report.

Alter Page Setup

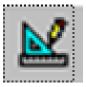
If when you view the envelope or report the page size appears incorrect, simply use the Page Setup command to readjust the page size to the correct size taking as per your computer and printer requirements. You may be required to alter the page size, orientation, and margins; you should not need to adjust the columns size.



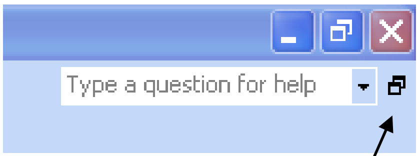


Change default paper size
You may find that your printer has been set to the American standard size being (*legal*) rather than Australian standard size A4.
To change the paper size for all reports, rather than change each report individually I would suggest that you alter your printer setup through the Control panel – Printers.
Select your default printer as you may have more than one printer installed on your computer.
Right click on the printer to bring up the options and then select properties. Click on the Setup tab – select Paper size and change it to A4 – then click on Apply, then click OK.
Restart your computer; the page setup for all your programs including the Ezymetics should now be set to A4

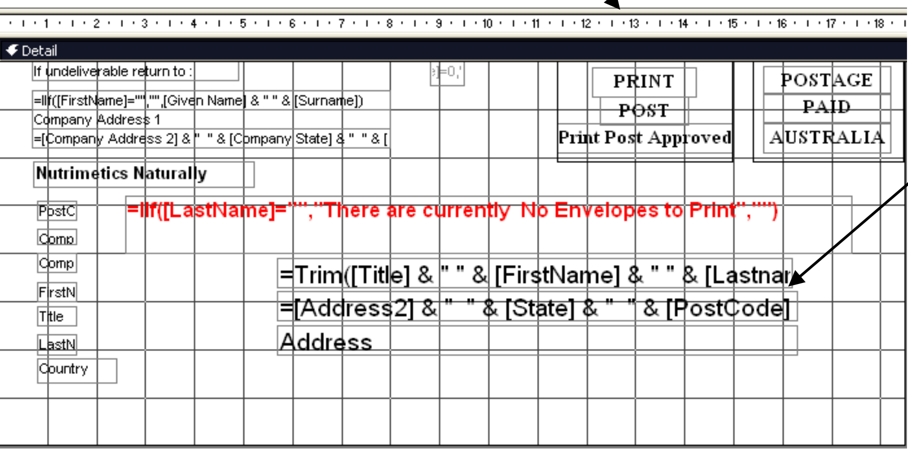
Customizing the Mail Page Design

On the various reports and Mailing preferences where ever you see  icon it means you can enter the design view of that report and make some changes to the way the report appears.

Sample of Design view layout

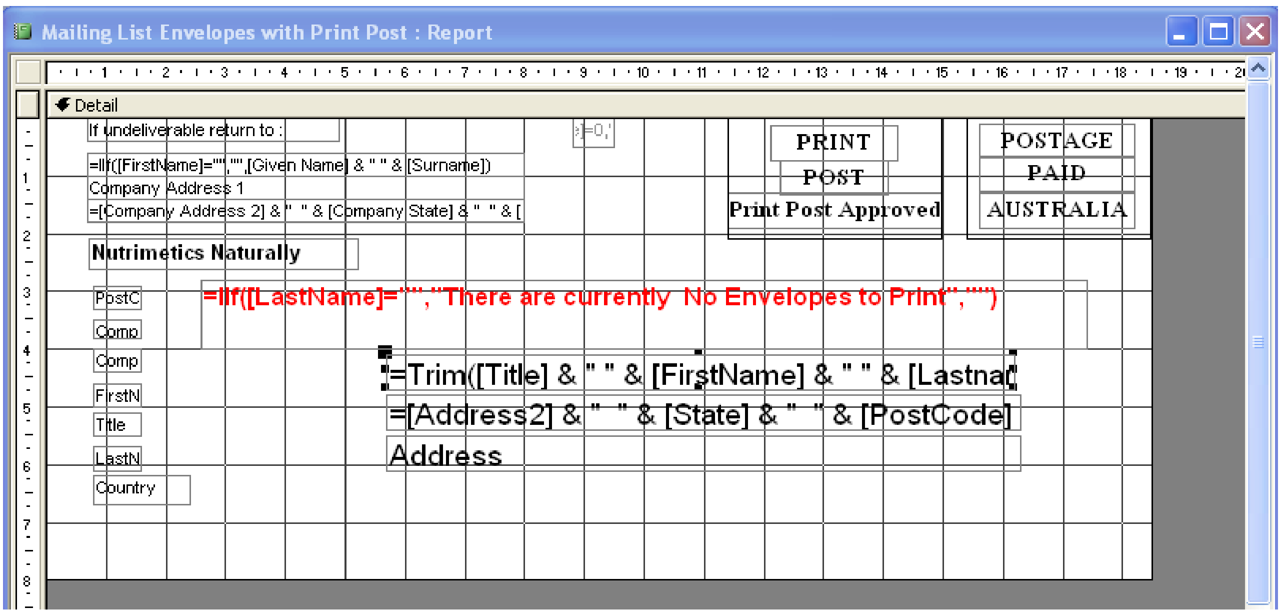


Resore Icon



Be aware on the mail envelopes and sheets there is an additional thin line to accommodate when required the Care / of field, this line located between the Trim (Title & FirstName & LastName and the Address 2 line,
The Care / of field has the ability to expand when required.

You can change the position and size of field within the design view, but you cannot add new items or change the font size of text. If you need any major alterations give me a call and I will see if that can be altered for you. If you make any alterations click on the restore icon to minimize the report, and then click on the close icon on the altered report and you will be asked if you want to save the changes.



By holding the Shift key while selecting you can select several items at the same time and either move or alter size of selected items simultaneously.

Sample of A4 Mailing Sheet with Order Form

If undeliverable return to :
Junie Watt
18 Lincoln Drive
EAST KEILOR VIC 3033

PRINT POST PP255003 / 06844	POSTAGE PAID AUSTRALIA

To Edit or Remove these note click on A4 Sheet - Order Form Special Notes

Special Rewards! Choose $50 worth of product for FREE
receive a lavendar infused neck wrap & New embroided summer Kaftan - yours to keep.
Plus 1/2 price shopping voucher - No Limit

To Edit or Remove these notes click on A4 Order Form Special Notes

Maureen Anderson
65 O'Farrell Street
YARRAVILE VIC 3013

nutrimetics CUSTOMER ORDER FORM

Product Description	Stock Code	Price	Qty	Total
To Edit or Remove these notes Click on Order Form Special notes on the Customer Menu				
Lipsticks - sixteen glorious colours page 20 & 21 only $10 each				
Book now for your Spa Experience and receive $50 Voucher				
		HANDLING CHARGE		$2.00

PAYMENT METHOD: ☐ CHEQUE ☐ CASH ☐ VISA ☐ MASTERCARD

Total $ ______

CARD NUMBER ☐☐☐☐ ☐☐☐☐ ☐☐☐☐ ☐☐☐☐

EXPIRY DATE ☐☐/☐☐ AMOUNT $ _________

CREDIT CARD HOLDER NAME (Please Print) _______________ SIGNATURE ________________

Please make cheques payable to Junie Watt

Postal Address Junie Watt
18 Lincoln Drive East Keilor VIC 3033

Business Phone: Mobile: Fax

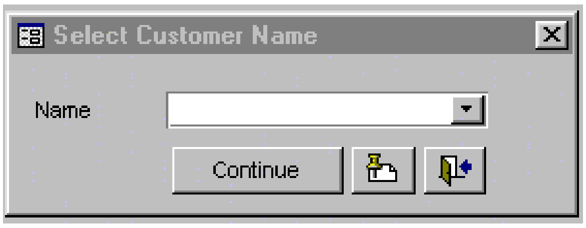
☐ I would like to know how I can start my own nutrimetics career (Part Time / Full Time)

Customer Rewards

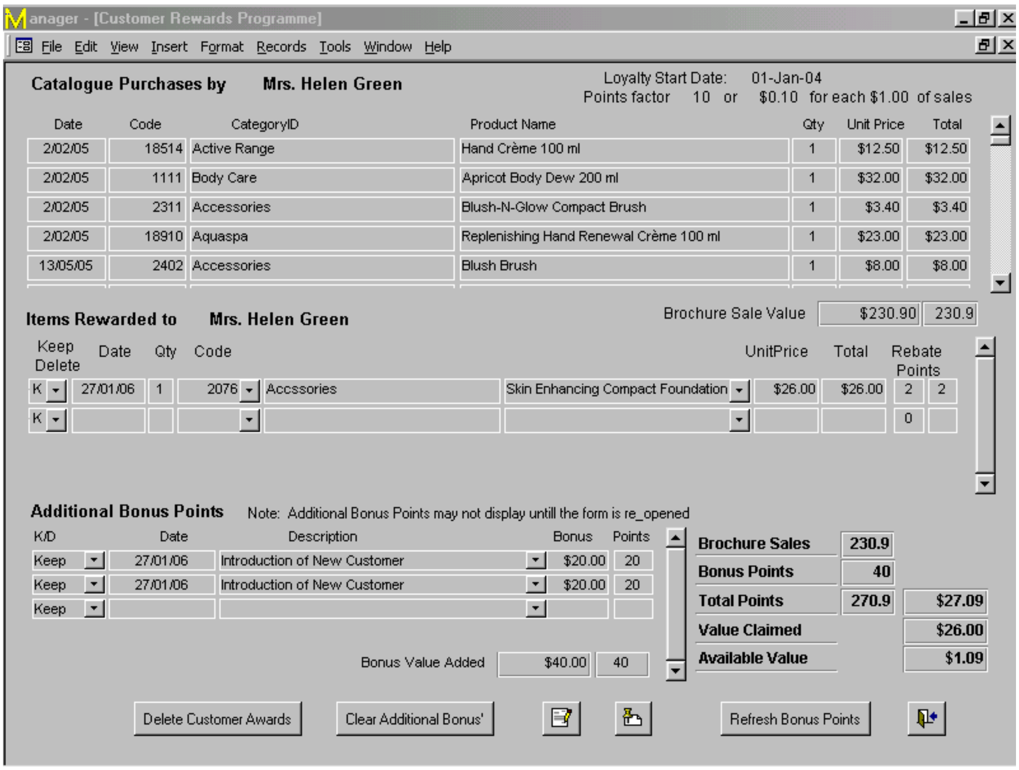
Customer rewards are only achieved by customers who purchase from the Mail-Out brochure and only apply during the period you set as your customer awards period.

There are two methods in which to view and edit specific customer rewards details. As mentioned briefly earlier – when enter customer orders and subsequently recording Order Payment and printing a the Order Invoice if a customer is eligible for customer rewards you can continue to the rewards section for that customer.
(Refer to Page 34 for additional information in relation to claiming Customer Rewards)

The alternative method is from the Customer Menu \ click Customer Rewards Program



Use the drop down List to select specific customer.
Only those customers who have placed orders through the brochure mail out will be available for selection.



The form will

- Display all items purchase by the selected customer via the Mail-out Brochure since the change of Customer Loyalty Period
- Display the Brochure Sales Value and Points Value.
- Display any products previously given to that customer since the change in Customer Loyalty Period.
- Enable you to select and enter Rebate Program Items that the customer may desire.
- Calculate the Rewards Claimed
- Display the Current Available Amount.
- Enable you to add additional Rewards points for applicable reasons, eg: introduction of new Hostess, large group order, etc.
- Enable you to delete a customer reward if required.

Customer Rewards Reports

To print or view a full display of all customers who meet the Customer Awards criteria, there are several options, which are available from the Reports menu.

Customer Awards Available: This will display a full listing of all customers who have purchased from various brochures, any additional bonus points that have been added, and any rewards points they have claimed; this could be a fairly lengthy report.

Abbreviated Brochure sales by period: As the name indicates reduces the customer rewards report, and will only display the value of the brochure sales by each applicable customer, it does not include any additional points or display rewards points that may have been already claimed by the customer.
To assist you calculating the current value using the abbreviated report you will need use the Additional Bonus Points Rewarded option to print or view those additional customer points and then use Customer Rewards Received Report, by collating this information you can quickly calculate the current value of individual customers rewards.

To print or view a specific customer rewards report – from the Customer menu use the Specific Customer Rewards Report option.

Adelaide Dimech Wednesday, 22 February 2006

Customer Reward Programme

SPECIAL REWARDS FOR SPECIAL PEOPLE
$50.00 OF FREE PRODUCTS

For the valued customers of

This reward cannot be credited or redeeemed with other Nutrimetics Consultants
Points can only be redeemed for items at Regular Retail Price

Thank you for you continued support Adelaide - it is appreciated.

* Receive 1 point for every dollar you spend, and earn Bonus points with special promotions from time to time.
* Accumulate 500 points minimum to choose your $ 50 free products.
* Place your own orders, and order for your family and friends to achieve your reward more quickly.
* Make sure you show your brochure around. You will be amazed at how soon you will have $ 50 to spend.

Note: Only orders purchursed and recorded as a Brochure Sale will be displayed

Date	Qty	Code	Description		Price	Total
08-Jul-04	1	18394	Botanicals Range - Exfoliating Soaps	Passionfruit Fantasy	$5.00	$5.00
08-Jul-04	1	18393	Botanicals Range - Exfoliating Soaps	Burst of Tangerine	$5.00	$5.00
08-Jul-04	1	18391	Botanicals Range - Exfoliating Soaps	Lime Delight	$5.00	$5.00
08-Jul-04	1	18390	Botanicals Range - Exfoliating Soaps	Berry Twist	$5.00	$5.00
08-Jul-04	1	151345	Fragrance Georgie On Ice	Georgie on Ice Pink Duo	$39.90	$39.90
14-Aug-04	1	1270	Crème Blush	Wine	$19.60	$19.60
23-Nov-04	1	151494	Xmas Special	Rose & Waterlily Set	$49.90	$49.90
23-Nov-04	2	1079	Xmas Special	Nutri-Rich Intensive Lip Treatment SPF 18	$19.90	$39.80
23-Nov-04	1	151521	Xmas Special	Aromatherapy Skin Soft Duo	$49.50	$49.50
23-Nov-04	1	1686	Fragrance	Khantor Eau de Parfum	$59.00	$59.00
02-Apr-05	1	14775	Classics Moisturising Lipsticks	Crystal Bronze - Navy Blue Case	$11.00	$11.00
02-Apr-05	1	14774	Classics Moisturising Lipsticks	Magenta Glow- Navy Blue Case	$11.00	$11.00
02-Apr-05	1	14777	Classics Moisturising Lipsticks	Radiant Blush - Navy Blue Case	$11.00	$11.00
02-Apr-05	1	14776	Classics Moisturising Lipsticks	Mauve Shimmer - Navy Blue Case	$11.00	$11.00
07-Apr-05	1	12431	Powders - Translucent Powder Jar	Medium 50 g	$27.90	$27.90
						$349.60

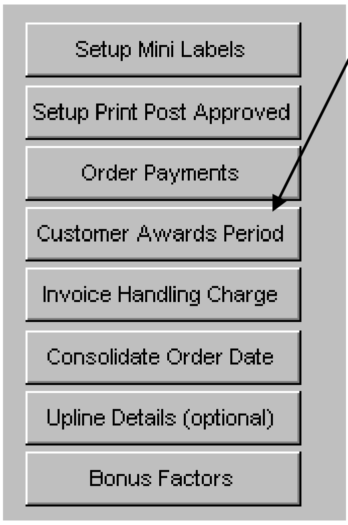
Points Value = Points Available divided by 10

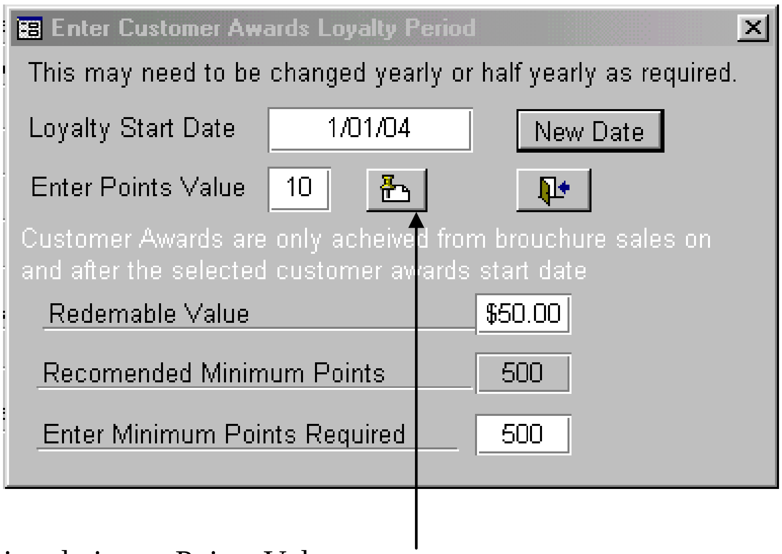
Brochure Points	**349.6**		
Bonus Points	**0**		
Total Points Achieved	**349.6**	=	**$34.96**
Points Claimed	**0**	=	**$0.00**
Points Available	**349.6**	=	**$34.96**

To edit the Rewards Points Details

The value of points rewarded for customer purchases and the points required to enable a customer to claim a specific cash value in product reward can be edited from two locations within the program.

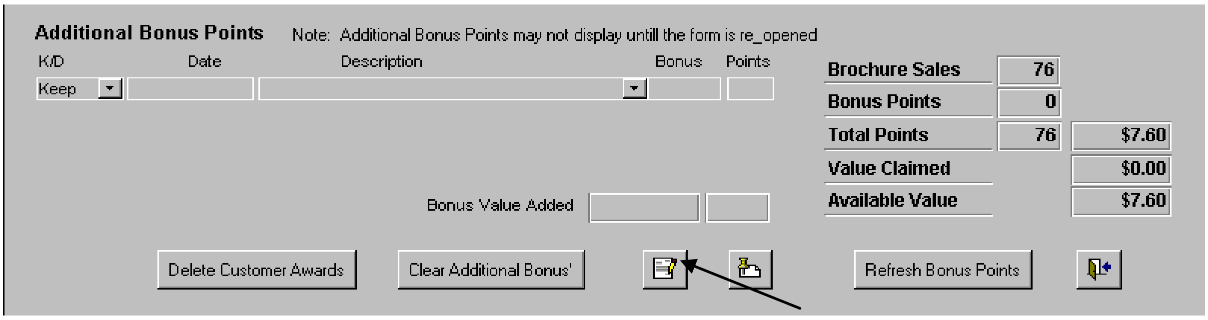
1. Using the Consultant Menu click on the Personal Details command button
   This will open the section where you can edit your personal details
   and options applicable to the running of your business
   to edit the Customer Rewards Period and value click on
   Customer Rewards Period



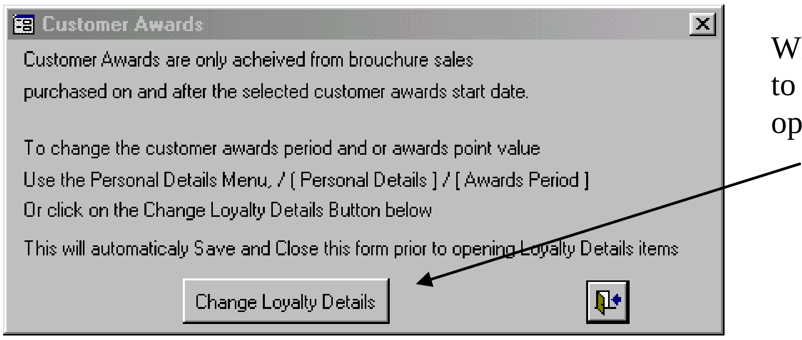


I would suggest reading the Help details in relation to Points Value.

2. When you activate Print Specific Order Invoice and Payment command from the customer order section, and a customer has accumulated brochure sales, click on the Edit Customer Rewards command button.

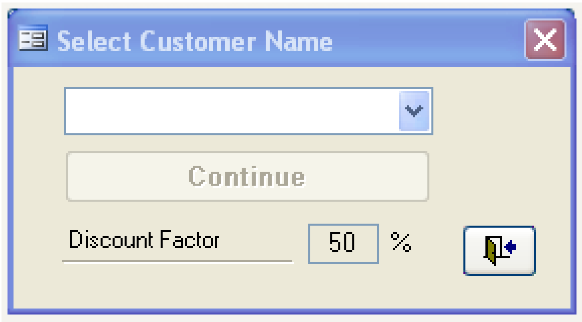


At the bottom of Customer Rewards form is a Help or note pad icon.

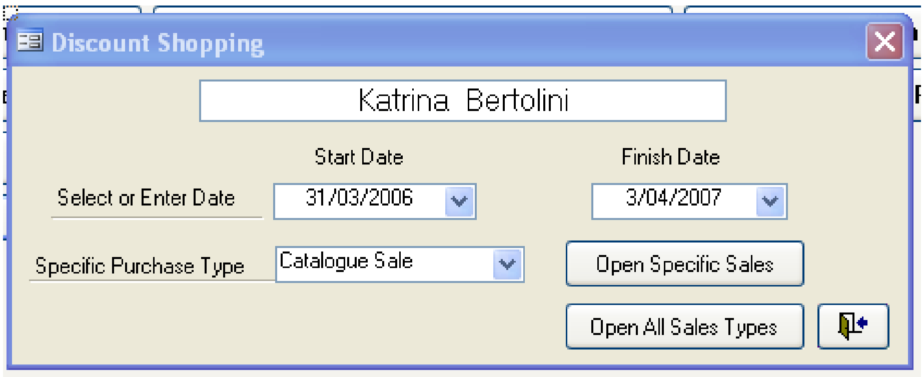


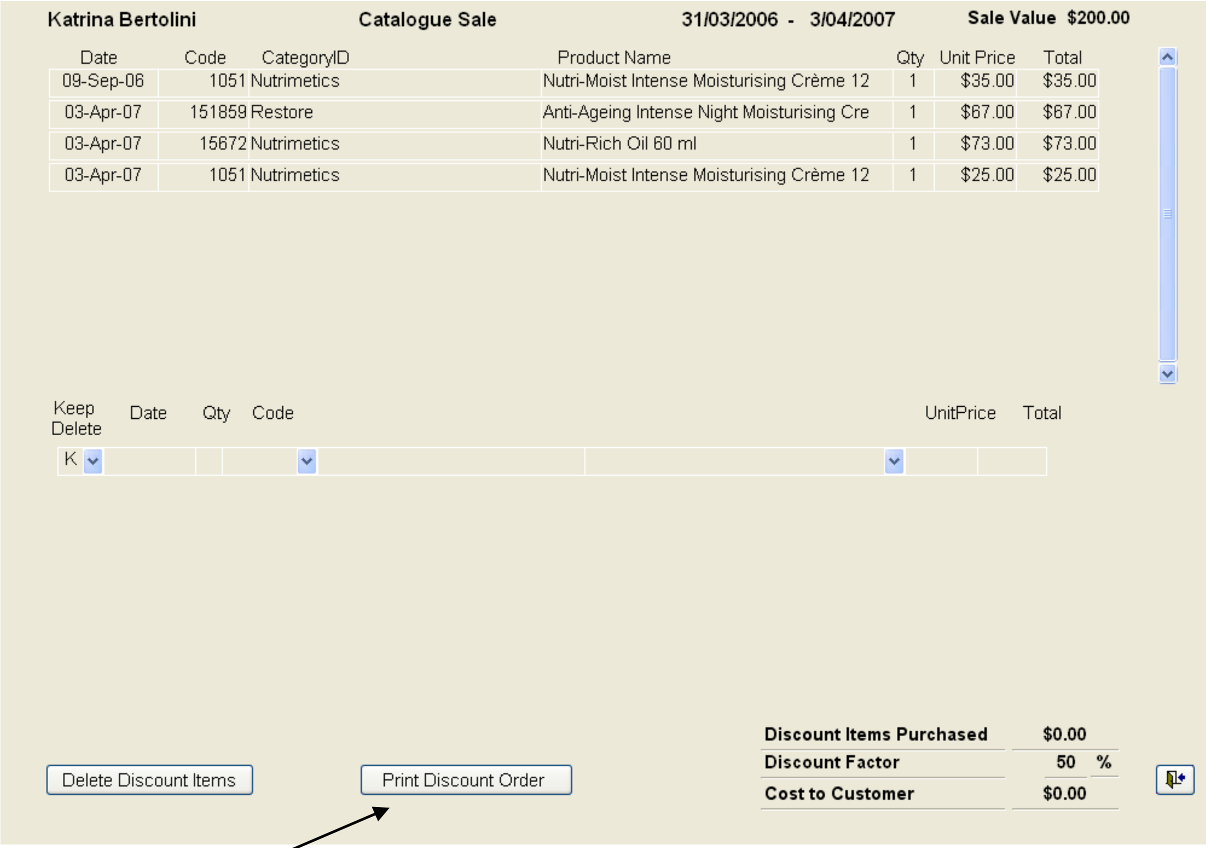
When the Help icon is activated it allows you to proceed to the form where you can change options related to Customer Rewards.

Discount Shopping
As an alternative or in conjunction with the Customer Rewards Programme there is the Discount Shopping option, this enables you to track the sales value of individual customers either on a specific sales type such as Beauty Spa, Regular Demonstration, Brochure Sales, etc during a selected period.
The discount factor is variable to suit your needs.



To use the Discount Shopping function, use the Customer Menu and select Discount Shopping
This will bring up a form where by you select the customer name and where you can vary the discount amount.
Then select the period of sale required for the selected customer.
You then have the option of selecting Specific sales type during the selected period, or selecting all Sales types.





Katrina Bertolini | Catalogue Sale | 31/03/2006 - 3/04/2007 | Sale Value $200.00

Date	Code	CategoryID	Product Name	Qty	Unit Price	Total
09-Sep-06	1051	Nutrimetics	Nutri-Moist Intense Moisturising Crème 12	1	$35.00	$35.00
03-Apr-07	151859	Restore	Anti-Ageing Intense Night Moisturising Cre	1	$67.00	$67.00
03-Apr-07	15672	Nutrimetics	Nutri-Rich Oil 60 ml	1	$73.00	$73.00
03-Apr-07	1051	Nutrimetics	Nutri-Moist Intense Moisturising Crème 12	1	$25.00	$25.00

Keep Delete	Date	Qty	Code		UnitPrice	Total
K						

Discount Items Purchased	$0.00
Discount Factor	50 %
Cost to Customer	$0.00

Delete Discount Items | Print Discount Order

Having selected the sales option required will produce a form in which you can enter the products selected by the customer to be purchased at discount.
Having selected the items simply, then select Print Discount Order.
The invoice will display the regular price the discount applied to the order and the Amount Payable.

AUTHORISED DISTRIBUTOR FOR THE PRODUCT OF: Nutrimetics

Distributor Details

	Junie Watt	Katrina Bertolini	
	18 Lincoln Drive		22 High Street
	East Keilor		Woodend
	VIC 3033		VIC 18290
Business Phone :		Home Ph:	5 471 1701
Home Phone :	03 93376613		0423 511 985
Mobile Phone :			
Fax			
E-Mail :			
ABN			

Discount Shopping items Purchased

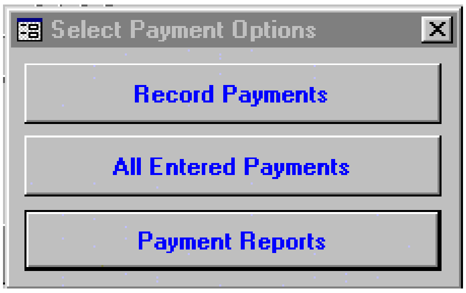
Date	Quantity	Product			Price
26-Jan-08	1	18290	Home Fragrance Oil - Lily 10ml	Aromatherapy	$19.00
26-Jan-08	1	18912	Rejuvenating Body Polish 200 ml	Aquaspa	$37.00

Total of Purchase	**$56.00**
Discount	**50 %**
Amount Payable	**$28.00**

Edit Customer Payments – and view / print Payment Reports

We need to keep track of our customer payments not only to record how much money is being received by customers, but also to enable us to include customer credit card details to consultant orders, either when placing orders to Nutrimetics via the Internet or when mailing or faxing an order to Nutrimetics.

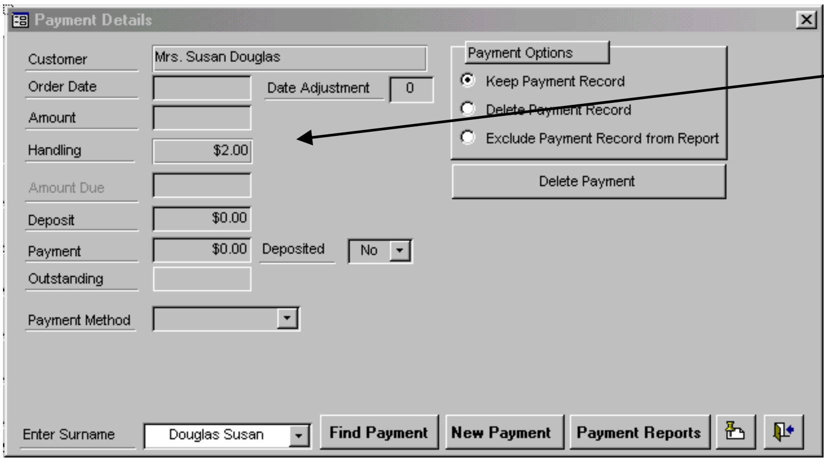
The program also allows for customers who place a deposit prior to delivery, and payments can paid by Credit Card, (Bank Card, Visa Card, and Master Card) Cash, and Money Order.



To Record a Customer Payment

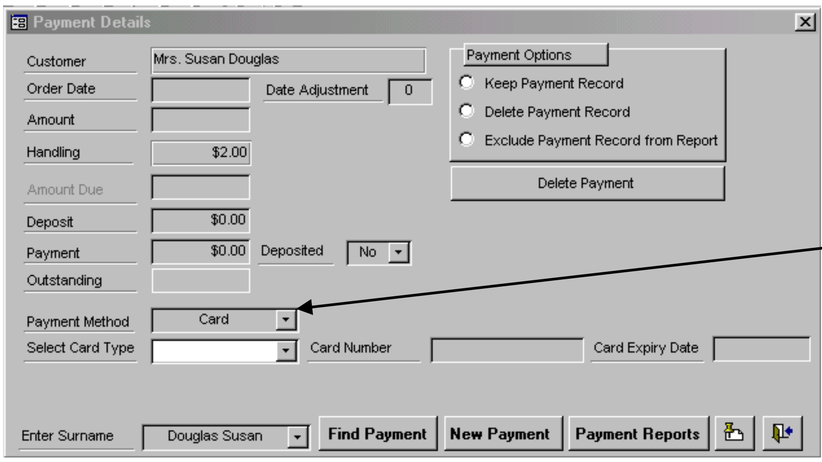
There are two methods of recording payments,

1. From the Customer Order – Print Invoice, which has been mention in a previous section.
2. From the Customers Menu select Order Payments
   Select the Record Payments button.



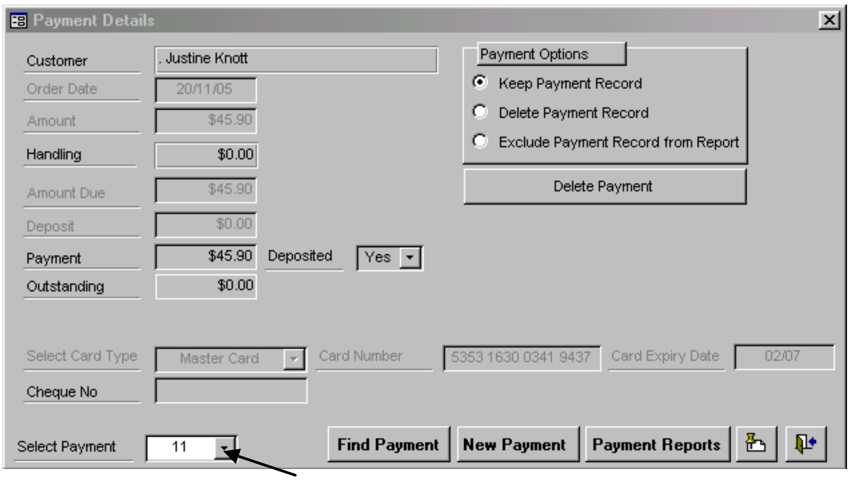
If you do not charge a Handling cost, it is essential that you enter the value $0.00 do not leave the handling charge blank.

Select New Payment – This will enable you to select the customer name from the drop down list.
Only customers who have placed orders after the Order Loyalty Period will be available for selection.
The Order Loyalty Period is established from the Personal Details Menu
When the customer name has been enter the payment method option is available



If you select either Card or Cheque the relevant entry details are displayed.

To Edit Customer Payments

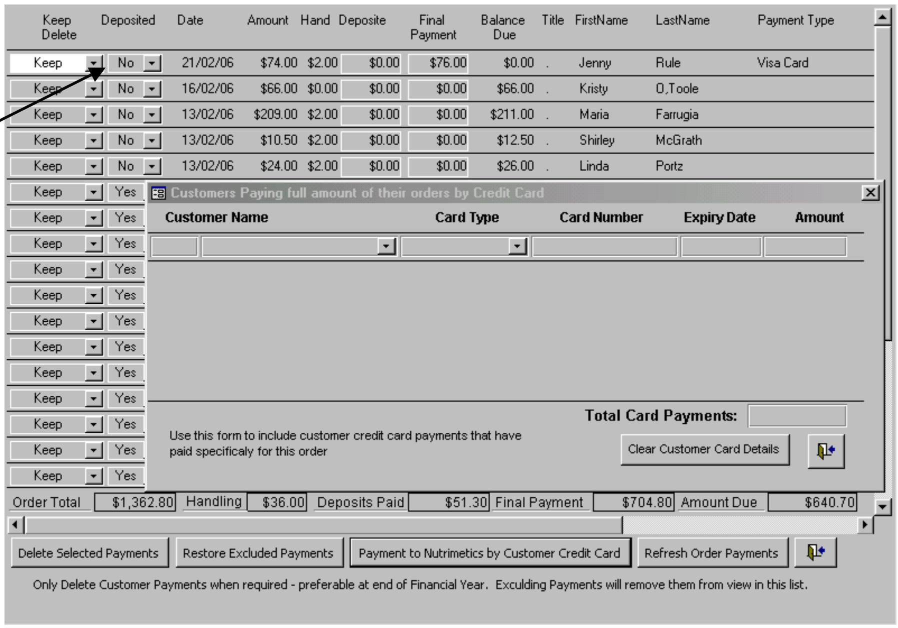


As a customer hopefully will make several purchases within your Order Loyalty Period the customer payments must be located using the Select Payment List.
The Payment selector will display all the customer payments; they will be sorted with the most recent payment at the top of list. It will display the Date, Amount and the Customer name

When finding existing payments the only options available will be to enter the final payment amount and if the payment is made by cheque you can record the cheque number.
You can also change the payment options of keep, delete, or exclude.
I would suggest that you do not delete customer payments until the end of the financial year.

All Entered Payments
From the payments options select All Entered Payments, this form will enable you to view and edit all customer payments not set as exclude.
The excluded payments can be restored to view by selecting Restore Excluded Payments.
From this form you can also include customer credit card payments when placing a consultant order, simply click Payment to Nutrimetics by Customer Credit Card.

Payments that have not been deposited will be displayed at top of form



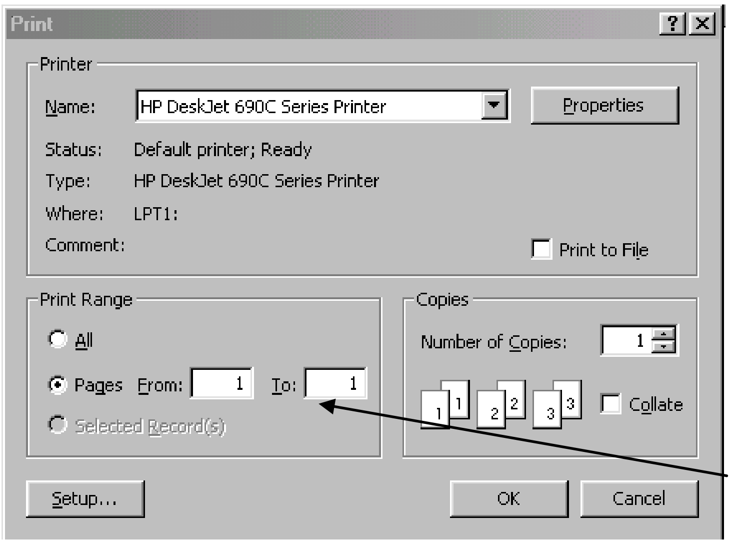
This will enable you to view the required customer or customers and their credit card details along with the date of order and the order amount on the main form, while entering the customer name card details and amount on the minor form. The credit card payments will then be included on the front cover of your consultant order, which can then be faxed or mailed to nutrimetics when placing your order.

After the Credit Card payment has been entered into the Customer Payment by Card Form, and has sent to nutrimetics to pay for customer order change the option from Deposited NO to Deposited YES.

Sales Reports

Rather than go into detail on each aspect of each individual Sales Report, I shall explain basically how to create the reports.

From the Reports Menu select Sales Reports; this will display an options form, where you can select the type of report required.



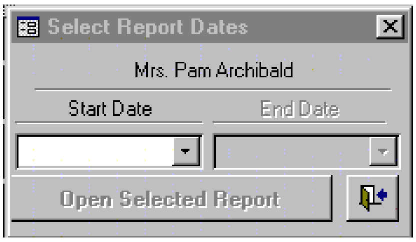
Print Options

When the report opens, if you select the printer icon top left hand corner you will print all the available information.

Full Sales Reports will be more lengthy reports than a Specific Sales Report, consequently rather than print a complete report it might be convenient to simply view the report and print the last page only.

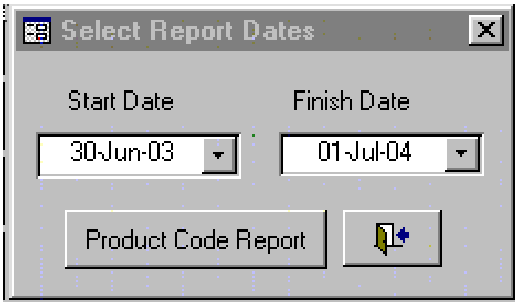
To print specific pages of a report, using the main menu toolbar select File, then the Print option, this will open a form from where you can enter the pages you wish to print

Sales Report by specific customer:



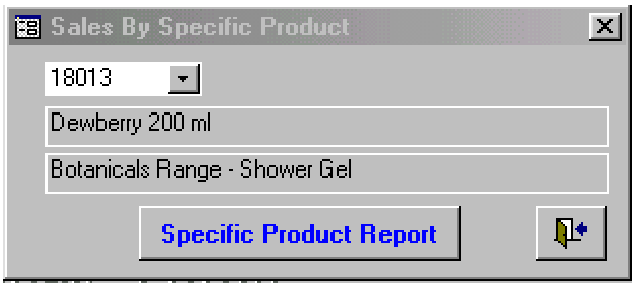
Enter or select the customer from the drop down list.
Then Select the Start and End Date of the Report

Sales Report by Product Code



This will display all products sold sorted by product code, if you want to know how many of a particular product you have sold, this will enable you to print or view the results.

Sales by Specific Product Code



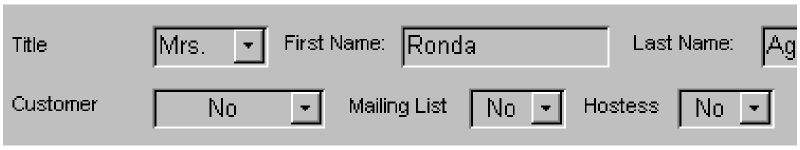
This will display only the selected product,

Excellent when comparing the monthly brochure with customer purchases.

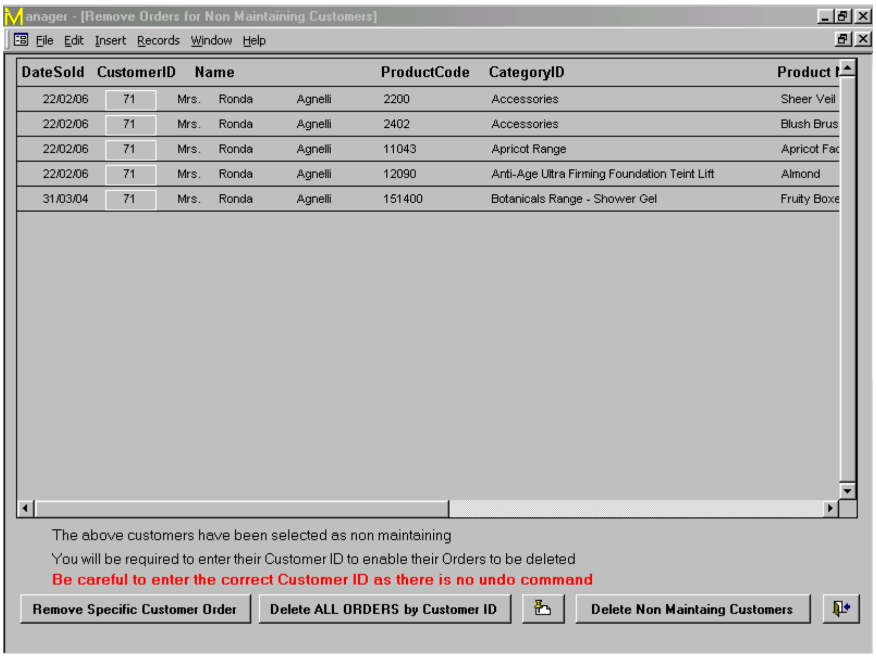
Removing Customer Records

It is not necessary to remove customer names from your records, in preference to removing the customer from your records entirely, simply remove the customer from your mailing list, you never know if that customer may contact you latter and wish to purchase product or hold a demonstration.

But if you do decide to remove a customer from your records, - from the Customer Details form list the customer as N0 and Hostess as No,

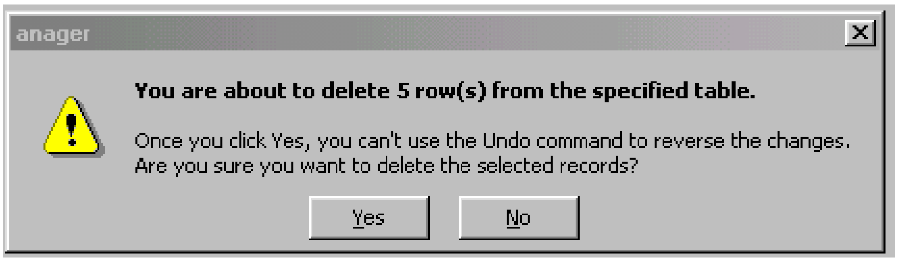


But before you remove the customer name from your records it is very important that you also remove any orders placed by that customer.
From the Update Records Menu use Delete Orders by Customer ID



Only orders belonging to customers listed as No will be displayed on this form,
This will enable you to quickly find their Customer ID

When you need to remove records of any type, you may receive two warning messages informing you that are about to delete some records. The first message will tell you that you are about to delete some records, the second message will tell you how many records you are about to delete.
You can have this message appear each time or you can choose not to display the message.



Accounts

The account-keeping component of the Ezymetics Program has been designed for simplicity of use. Being a single entry accounting system rather than a double entry system it does not show for example if money is taken to purchase stock, consequently the cash asset has decrease but the stock assets have increased. Being single entry it will only show that the cash asset has decreased. The reports printed when required will enable your accountant to establish the business value, the business earnings and the tax applicable. Naturally it is still important to file your receipts.

I have set up a comprehensive chart of accounts, which may be sufficient to fulfill the needs of your business. You can easily edit or add accounts types using the form linked to the Accounts Menu

Chart of Account

The chart of accounts reflects the various categories of both debit and credit items,
For example Money may be money in cash, money invested short tem, money invested long term, Cheque account, etc; consequently money can flow and out of the various accounts.
The description would describe where the money came from or went to,
For example *(Debit)* account *(Cash on hand)* description *(Purchase nutrimetics product for resale)*
(Credit) account *(Cash on hand)* description *(Sale of nutrimetics products)*
Telephone there may be only one account, but you could have a home phone, business phone, mobile phone, all these could reflect on the telephone account but would be sorted using the description;
For example *(Debit)* accounts *(Telephone)* description *(mobile phone)*
Over a period of time establish a list of descriptions, to assist your account to reflect on the various transaction made throughout the year.

Using the chart of accounts, in conjunction with established descriptions will enable you or your accountant to separate and claim taxation deductions applicable

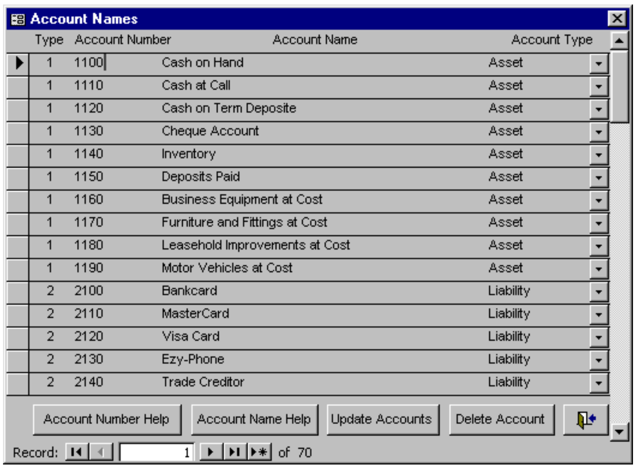
Edit Chart of Accounts

You may need to adjust the account names in the Chart of Accounts,
Use this form to the edit the Chart of Accounts,

If you enter New Account Names it is important to number them correctly.

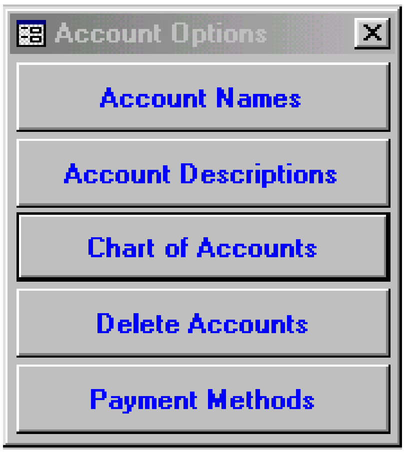
The first cell of Account Number (Type) is linked to the Account type, when the Account Type is changed using the drop down arrow, The Type number on the left of the Account Number will change automatically.

When entering numbers into the next section (Account Number), it is essentially that the first number is the same as Account Type number, for example all Asset accounts must start with a 1 followed by three other numbers

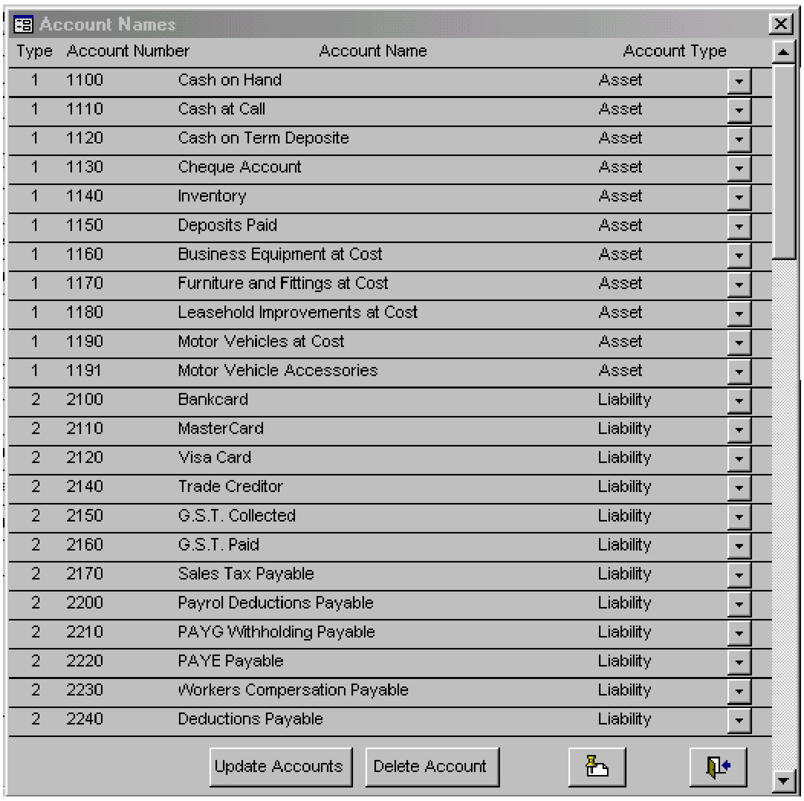


Account Options

Use the various Account Options to establish your personal preferences



Account Names



Type	Account Number	Account Name	Account Type
1	1100	Cash on Hand	Asset
1	1110	Cash at Call	Asset
1	1120	Cash on Term Deposite	Asset
1	1130	Cheque Account	Asset
1	1140	Inventory	Asset
1	1150	Deposits Paid	Asset
1	1160	Business Equipment at Cost	Asset
1	1170	Furniture and Fittings at Cost	Asset
1	1180	Leasehold Improvements at Cost	Asset
1	1190	Motor Vehicles at Cost	Asset
1	1191	Motor Vehicle Accessories	Asset
2	2100	Bankcard	Liability
2	2110	MasterCard	Liability
2	2120	Visa Card	Liability
2	2140	Trade Creditor	Liability
2	2150	G.S.T. Collected	Liability
2	2160	G.S.T. Paid	Liability
2	2170	Sales Tax Payable	Liability
2	2200	Payrol Deductions Payable	Liability
2	2210	PAYG Withholding Payable	Liability
2	2220	PAYE Payable	Liability
2	2230	Workers Compersation Payable	Liability
2	2240	Deductions Payable	Liability

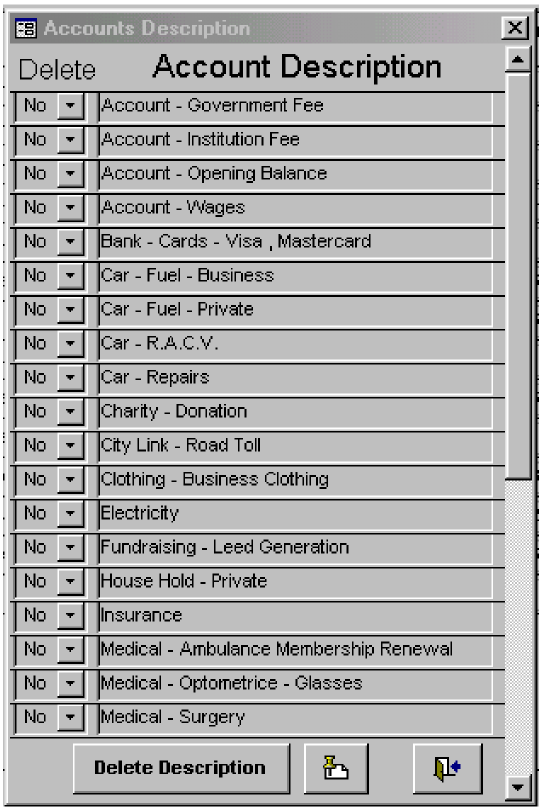
Account names or Chart of Accounts can be added to the bottom of this form or edited as required.

Click on the notepad button to read the associated help

Account Descriptions.

The Description is used in conjunction with the Account Name to create greater detail to the Credit or Debit item.

You can enter as many account descriptions, as you need but try to restrict your description list,
for example don't enter a description
(Calls for business purposes)
then latter enter another new description
(Business calls)
Try to create a simple description list and use the same description for similar items, as it will only complicate your transactions reports if you have a multitude of the same item descried in a different ways.
To delete a description simply select Delete (Yes) then click the Delete Description button.



Delete	Account Description
No	Account - Government Fee
No	Account - Institution Fee
No	Account - Opening Balance
No	Account - Wages
No	Bank - Cards - Visa , Mastercard
No	Car - Fuel - Business
No	Car - Fuel - Private
No	Car - R.A.C.V.
No	Car - Repairs
No	Charity - Donation
No	City Link - Road Toll
No	Clothing - Business Clothing
No	Electricity
No	Fundraising - Leed Generation
No	House Hold - Private
No	Insurance
No	Medical - Ambulance Membership Renewal
No	Medical - Optometrice - Glasses
No	Medical - Surgery

Transaction Entry

Date
To record the date of item double click on the date field to record the current date, to alter the date yes the Date Adjustment at the bottom of form, alternatively you can enter the required date within the date field manually.

Ensure that the computer is set to Australian Date preference, as the program has been designed to enter and display dates in numeric format 7/9/03 as opposed to 07-Sept-2003,
If the computer is set to America Format it will interrupt that same date as 09-July-2001

Account
The program allows you to record Income and debit items in different accounts which are set up via Account Options. The primary financial reports eg; (Financial Year Report) are reported through the Primary default account (Account 1)

Category
IT IS ESSENTIAL to use the Category drop down list which taken from your chart of account that is established or edited through Account Options when recording an income or expense item as items are linked by account number.

Description
Can be selected from the description list which is established or edited through Account Options and Account lists, select choices through the drop down arrow lists, or you can type your own description for that item..

Reconciled
By comparing with your bank statement if the payment or withdrawal collates with the statement select Y in the reconciled column.

GST
If GST is applied to the item, insert the letter Y in the GST column.
This will display the amount of G.S.T. which has been either received and or paid throughout the transaction periods

Delete	Date	Account	Category	Description	Reconciled	GST	W/draw	Method	Chq No	Deposit	Receipt
N	1/07/2002	1	Cash at Call	Account - Opening Balance	Y	N	$0.00	Cash		$100,000.00	
N	9/07/2002	1	Telephone 9 331 3053	Phone - 9 331 3053 - Optus	Y	N	$9.47			$0.00	
N	9/07/2002	1	Nutrimetics Training	Business Training - Nutrimetics	Y	N	$460.00			$0.00	
N	9/07/2002	1	Nutrimetics Training	Business Training - Nutrimetics	Y	N	$460.00			$0.00	
N	15/07/2002	1	Telephone 9 337 6613	Phone - 9 337 6613 - Primus Teleco	Y	N	$111.96	Cash		$0.00	
N	25/07/2002	1	Motor Vehicle	Car - R.A.C.V.	Y	N	$119.00	Cash		$0.00	
N	26/07/2002	1	Office Supplies	Office - Supplies - Stationary	Y	N	$15.00			$0.00	
N	31/07/2002	1	Gas	AGL Gas	Y	N	$219.60			$0.00	
N	7/08/2002	1	Telephone 9 331 3053	Phone - 9 331 3053 - Optus	Y	N	$7.98			$0.00	
N	9/08/2002	1	Telephone 9 331 3053	Phone - 9 331 3053 - Optus	Y	N	$46.30			$0.00	
N	9/08/2002	1	Postage	Office - Australia Post - Stationary &	Y	N	$2.75			$0.00	
N	13/08/2002	1	Telephone 9 337 6613	Phone - 9 337 6613 - Primus Teleco	Y	N	$108.31	Cash		$0.00	
N	28/08/2002	1	Postage	Office - Australia Post - Stationary &	Y	N	$4.60	Cash		$0.00	
N	1/09/2002	1	Office Supplies	Office - Supplies - Stationary	Y	N	$13.00			$0.00	
N	7/09/2002	1	Electricity	AGL Electricity	Y	N	$603.33			$0.00	
N	9/09/2002	1	Rental Property Maintenance	Rental Property - Maintanence - Pai	Y	N	$26.15	Cash		$0.00	
N	12/09/2002	1	Telephone 9 337 6613	Phone - 9 337 6613 - Primus Teleco	Y	N	$236.86	Cash		$0.00	
N	22/09/2002	1	Gas	AGL Gas	Y	N	$207.35			$0.00	
N	27/09/2002	1	Motor Vehicle	Car - Repairs	Y	N	$458.45			$0.00	
N	10/10/2002	1	City Link	City Link - Road Toll	Y	N	$75.00	Cash		$0.00	
N	15/10/2002	1	Telephone 9 337 6613	Phone - 9 337 6613 - Primus Teleco	Y	N	$22.76			$0.00	
N	24/10/2002	1	Entertainment - Optus Televevi	Optus Pay TV	Y	N	$54.65			$0.00	

Double Click to Enter Date Date Adjustment 0 Go to First Date Go to Last Date

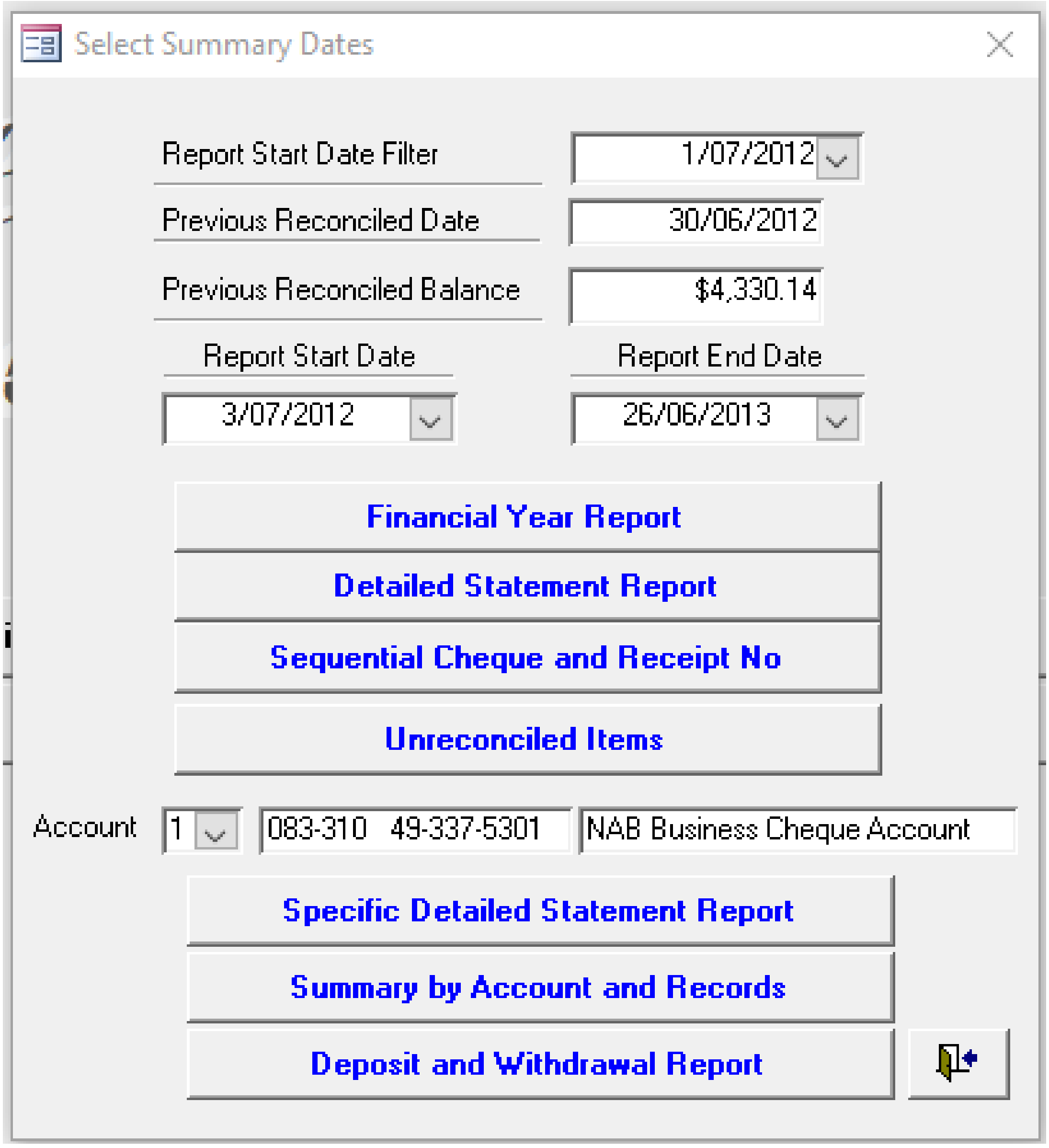
It is Essential that each Transaction Record uses only Chart of Account Categories as they are linked by Chart of Account Number.

Use: Ctrl C to Copy and Ctrl V to Paste Categories - or use Drop Down selector only - Do Not Edit or modify Categories unless through Chart of Accounts Setup - See Account Options

Total Deposit	$100,000.00	**Total W/Draw**	$105,494.44	**Un- Reconciled Balance**	-$5,494.44	Enter Statement Balance
Total Reconciled Deposit	$100,000.00	**Total Reconiled Debit:**	$105,494.44	**Reconciled Balance**	-$5,494.44	
Total G.S.T. Received	$0.00	**Total G.S.T. Paid**	$0.00	**Cash on Hand - Float**	$40.00	

Delete Selected Transactions Account Options Calculator

Account Reports



Financial Year Report
This report Debit and Credit listings separately and shows a yearly profit or loss amount

Financial Report for Period - 3/07/2018 - 26/11/2019

Previous Year Reconciled Balance at 30/06/2018 $3,714.72

Expense Items

1	Income	Weight Fee	$6.10
72	Cost of Sales	Incentive	$450.00
69	Cost of Sales	King / Queen	$608.60
1	Cost of Sales	State Night Payment	$10.00
2	Expense	Gift - Token of appreciation	$315.00
3	Expense	Gift - Award	$166.50
1	Expense	Government Tax	$43.00
1	Expense	Legal and Accounting Fees	$50.00
3	Expense	Office Equipment - Purchase	$76.30
25	Expense	Office Supplies	$1,056.49
1	Expense	Training	$225.00
2	Expense	Town Club Australia Inc.	$705.00
5	Expense	Town Club - Membership Registration	$2,388.00
5	Expense	Hall / Building Hire	$4,356.10
		Total Yearly Expenses	**$10,456.09**

Income Items

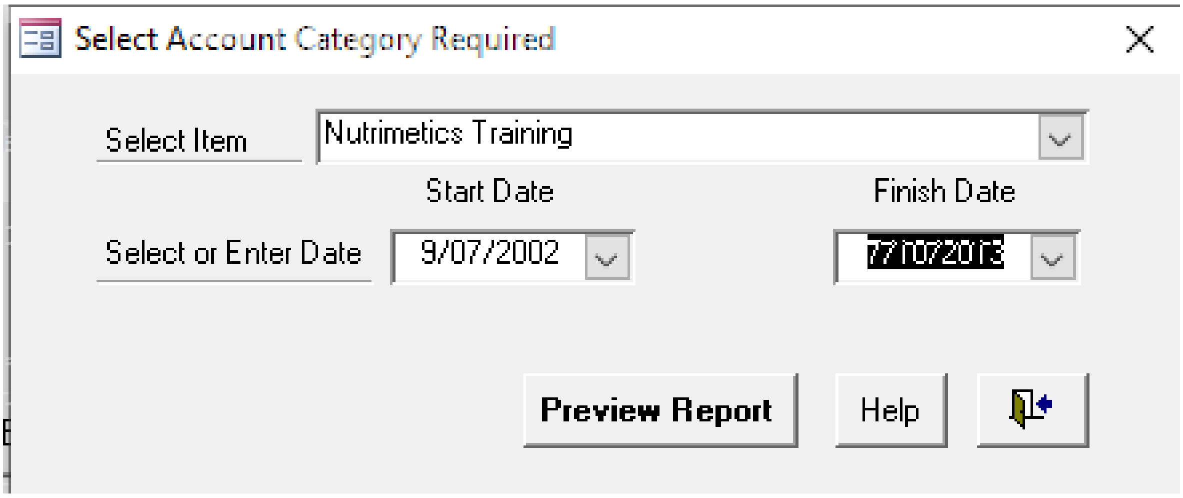
1	Liability	Deposit Received	$125.00
2	Liability	State Night Payment Received	$190.00
68	Liability	Registration Fee Collected	$2,200.00
1	Income	Bank Deposit	$0.09
4	Income	Interest Income	$0.43
71	Income	Members Dues	$7,702.00
67	Income	Raffle	$1,470.40
1	Income	Sale	$6.00
1	Income	Undeposited Previous Income	$10.00
65	Income	Weight Fee	$341.30
2	Income	Joining Member Fee	$100.00
10	Income	Special Levy	$290.00
1	Cost of Sales	State Night Payment	$260.00
		Total Yearly Income	**$12,695.22**

Total Yearly Income :	$12,695.22		**GST Received :**	$0.00
Total Yearly Expenses :	$10,456.09			
Balance :	**$2,239.13**		**GST Paid :**	$0.00
Previous Year End Balance :	$3,714.72			
Current Reconciled Balance :	**$5,193.00**			
Bank Statement Balance :	**$5,037.88**		**Cash at Call / Float :**	$24.10
Statement Variation Amount :	**-$155.12**	**Debit Variation**		
Profit / Loss for year 2019 :	**$1,478.28**	**Profit for Year**		

Specific Detailed Statement Report
Produces a report that is sorted by Account names as listed in the Chart of Accounts.

Summary by Accounts and Records Report.
The reports are primarily sorted and grouped by account types which include: Asset, Liability, Equity, Income, Cost of Sales, Expense, Other Income, and Other Expense.
The individual transactions within each account type are sorted by account name as entered in the Chart of accounts.

Specific Category Report
Select the required category and only those items in the selected category will be reported



Specific Description Report
This Report enables you to select from the available account descriptions and give a detailed report in relation to that item for the selected period.